

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY



**NATIONAL MOTORCYCLE DEALERS ASSOCIATION**

**DEALER ATTITUDE SURVEY RESULTS**

**SPRING 2018**

## **NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY**

### **NATIONAL MOTORCYCLE DEALERS ASSOCIATION**

#### **DEALER ATTITUDE SURVEY SPRING 2018**

We are pleased to reveal the findings of the latest Motorcycle Dealer Attitude Survey conducted in April 2018 by the National Motorcycle Dealers Association (NMDA), which represents the interests of the UK's franchised motorcycle dealer sector through business support to its members and parliamentary lobbying on behalf of the industry.

This survey is carried out on a twice-yearly basis, and examines how dealers view the major issues currently affecting them, while also evaluating how these views are changing over time. It also offers motorcycle dealers and their respective manufacturers a clear idea of the balance of opinion held on a range of views within their networks.

Dealers were asked to respond to questions covering significant aspects of their business relationship with their manufacturer. From these responses scores have been produced on a simple five point scale, running from 1 - very dissatisfied/very poor to 5 - very satisfied/very good (question 18 is rated from 1 - very poor to 10 - excellent).

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

**National Motorcycle Dealers Association**

**May 2018**

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NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY



**Kawasaki**



**PIAGGIO®**



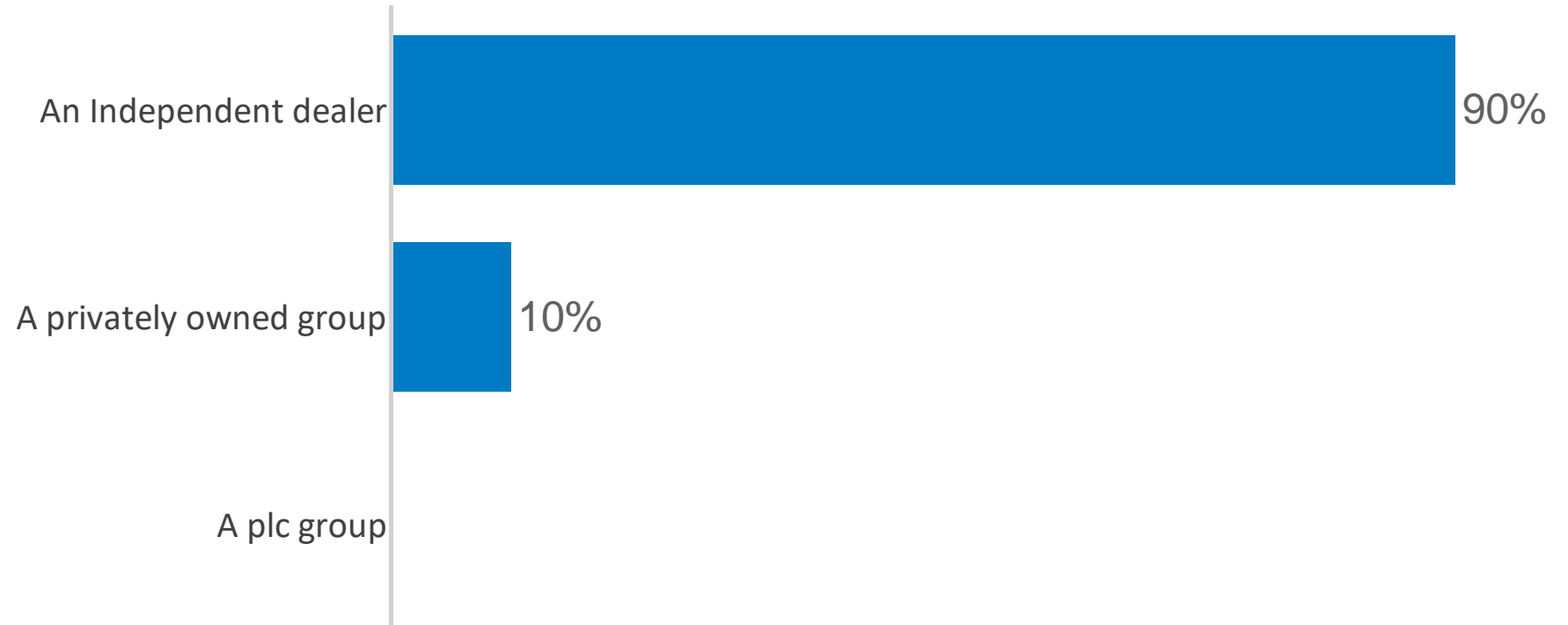
## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY

### BREAKDOWN OF RESPONSES

FRANCHISE	NUMBER OF RESPONDENTS	TOTAL NETWORK SIZE	RESPONSE RATE %
DUCATI	2	33	6
HARLEY DAVIDSON	5	29	17
HONDA	28	65	43
KAWASAKI	16	63	25
KTM	9	44	20
PIAGGIO GROUP	21	66	32
SUZUKI	17	101	17
TRIUMPH	15	48	31
YAMAHA	38	113	34
<b>TOTAL</b>	<b>151</b>	<b>547</b>	<b>28</b>

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY

Q2 In this site are you:

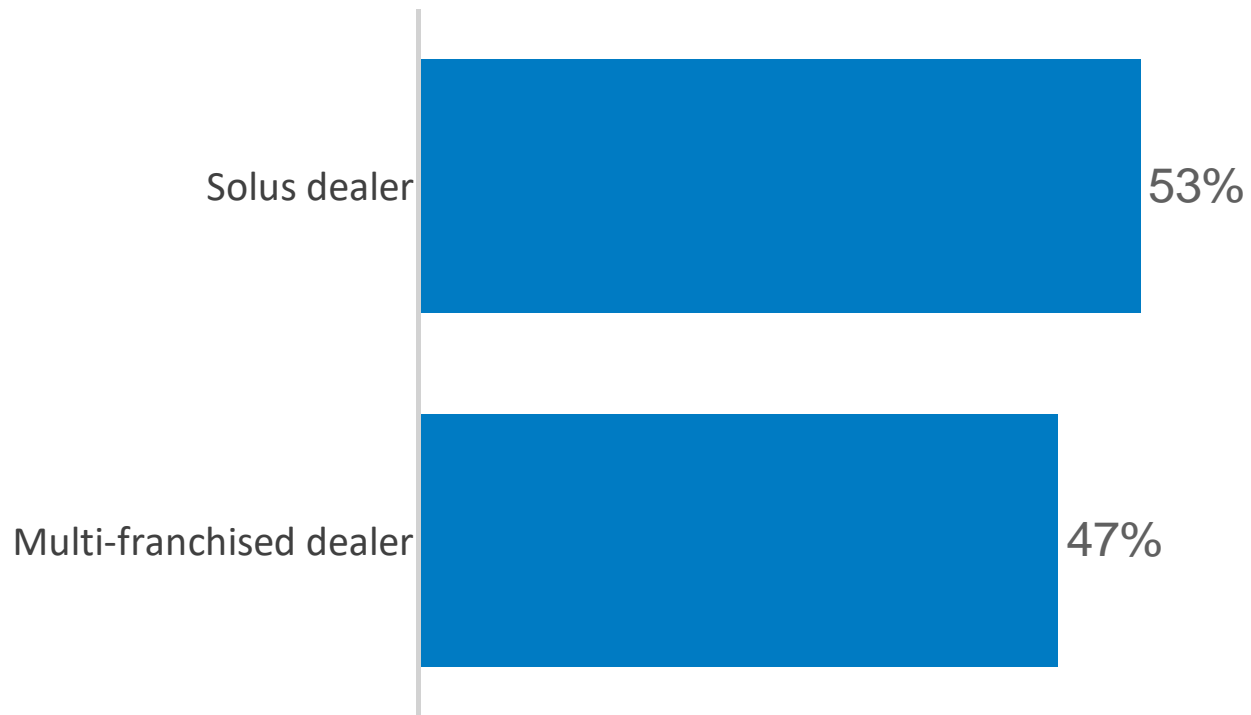


### AUTUMN 2017 SURVEY RESULTS

<b>INDEPENDENT</b>	<b>75%</b>
<b>PRIVATELY OWNED</b>	<b>22%</b>
<b>PLC GROUP</b>	<b>2%</b>

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY

Q3 Is this site:

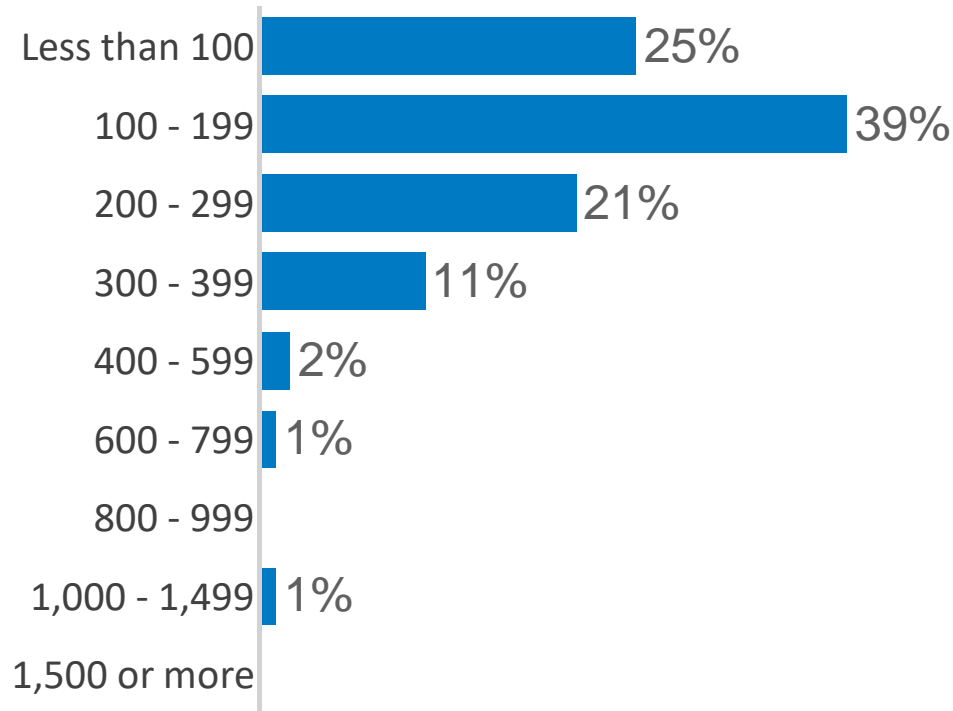


### AUTUMN 2017 SURVEY RESULTS

<b>SOLUS</b>	<b>61%</b>
<b>MULTI-FRANCHISED</b>	<b>39%</b>

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY

Q4 How many new motorcycles do you sell per annum?

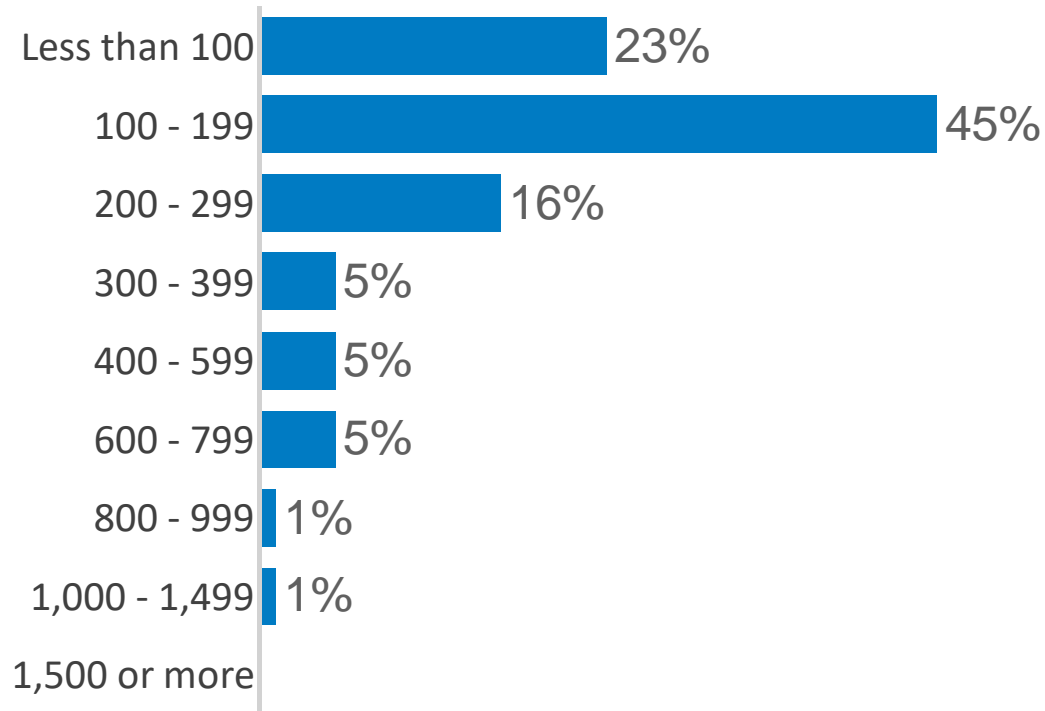


### AUTUMN 2017 SURVEY RESULTS

Less than 100	22%	400 – 599	5%
100 – 199	37%	600 – 799	0%
200 – 299	27%	800 – 999	0%
300 – 399	7%	1000 – 1499	2%
1500 or more	0%		

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY

Q5 How many used motorcycles do you sell per annum?



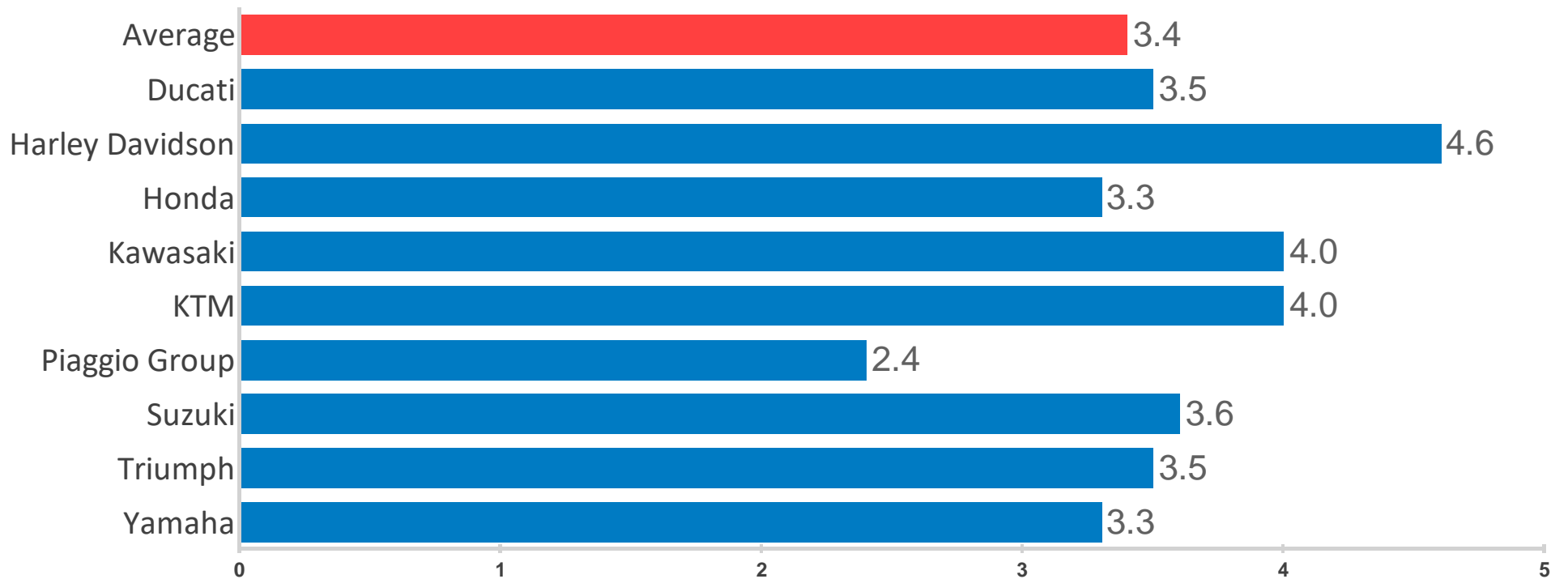
### AUTUMN 2017 SURVEY RESULTS

Less than 100	27%	400 – 599	9%
100 – 199	36%	600 – 799	3%
200 – 299	19%	800 – 999	1%
300 – 399	6%	1000 – 1499	0%
1500 or more	0%		



## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY

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

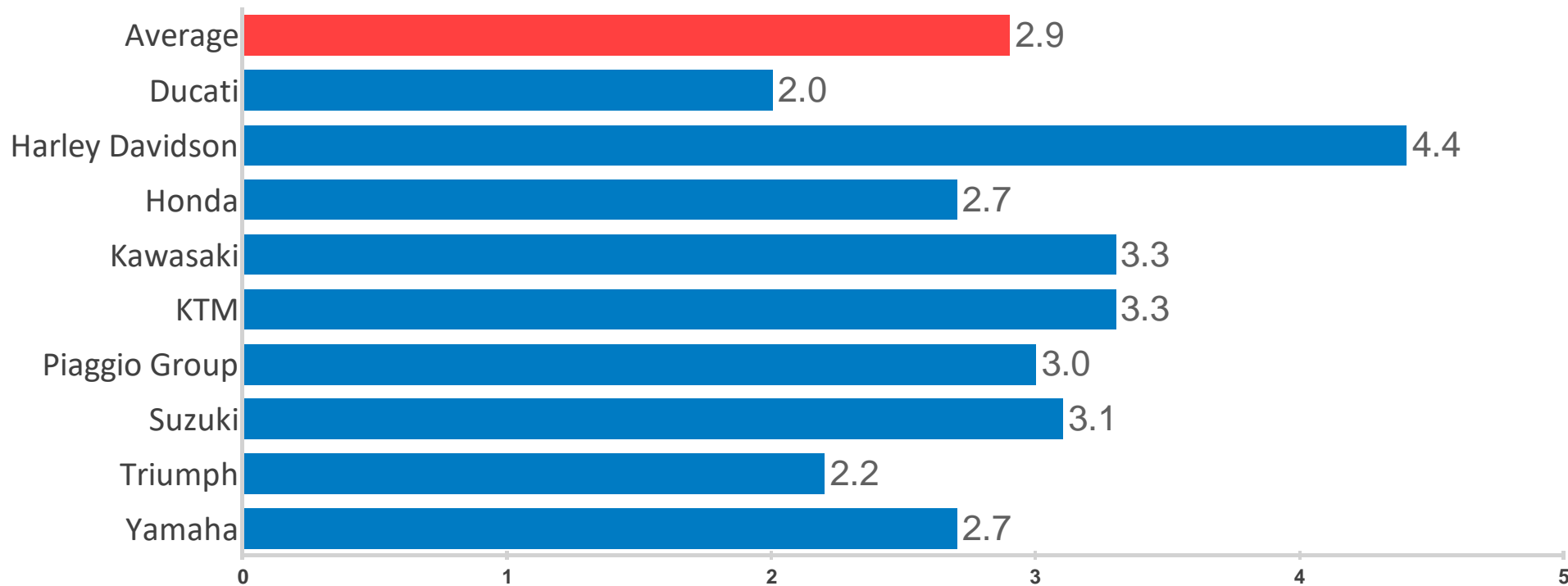


### PREVIOUS SURVEY RESULTS – AUTUMN 2017

6a: The product's price and value against other brands			
Ducati	3.3	Triumph	3.8
Harley Davidson	4.0	Yamaha	3.4
Honda	3.8		
Kawasaki	3.6		
KTM	3.8		
Piaggio Group	2.0		
Suzuki	3.6	AVERAGE	3.5

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY

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

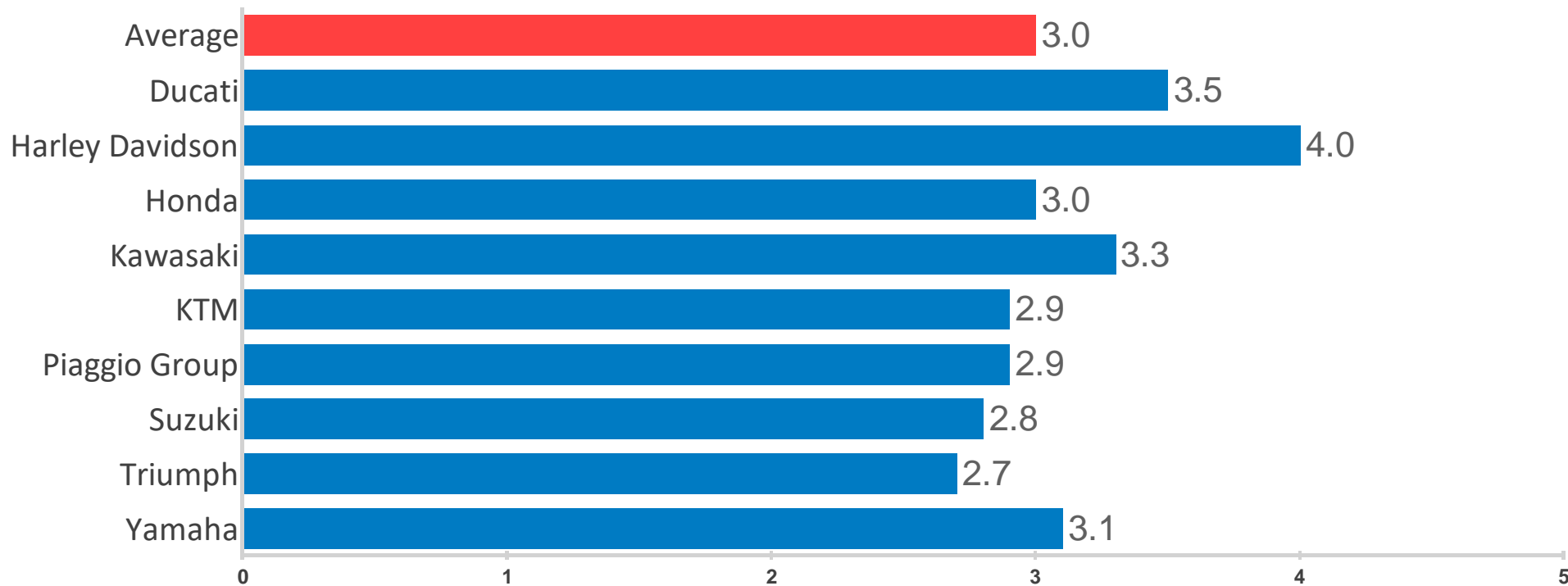


### PREVIOUS SURVEY RESULTS – AUTUMN 2017

6b: How realistic is your target and performance related bonus in terms of achievement			
Ducati	3.0	Triumph	2.6
Harley Davidson	4.1	Yamaha	2.8
Honda	2.7		
Kawasaki	2.9		
KTM	3.3		
Piaggio Group	2.5		
Suzuki	3.2	AVERAGE	2.9

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY

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

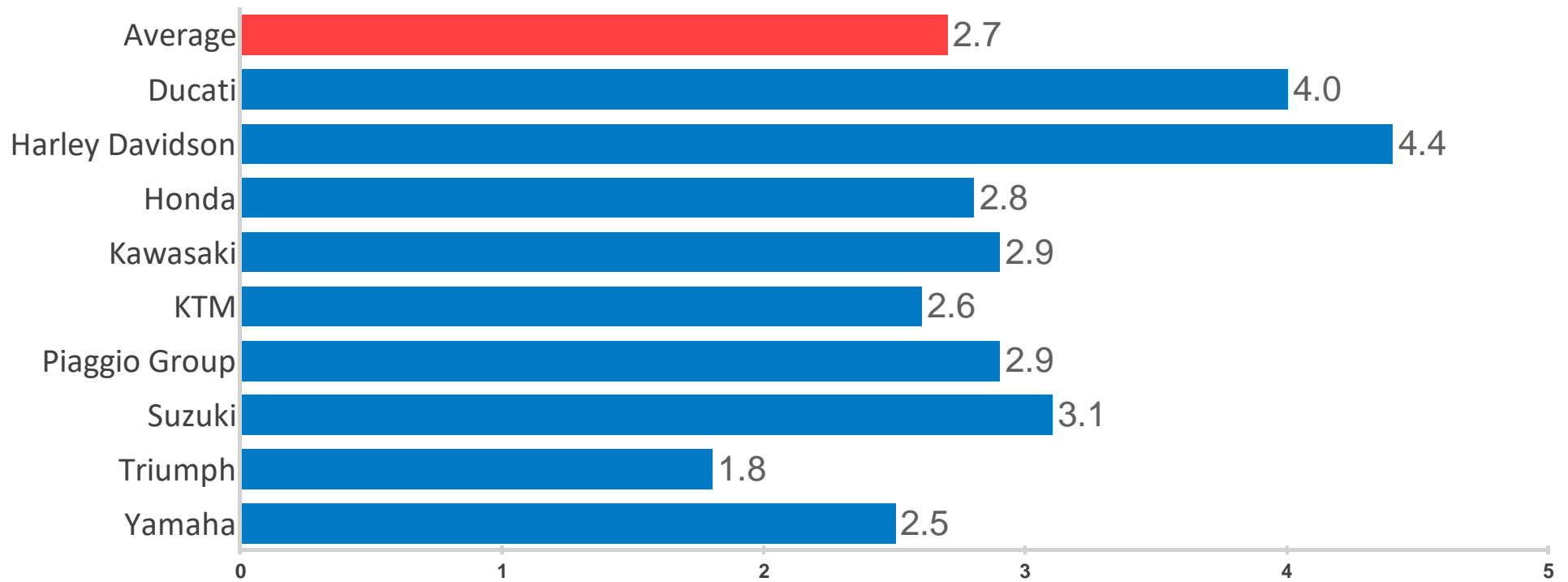


### PREVIOUS SURVEY RESULTS – AUTUMN 2017

7a: The fairness of your manufacturer's policy for the supply and stocking of motorcycles			
Ducati	2.8	Triumph	2.9
Harley Davidson	4.3	Yamaha	2.8
Honda	3.5		
Kawasaki	3.3		
KTM	3.1		
Piaggio Group	2.1		
Suzuki	3.0	AVERAGE	3.1

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY

Q7 b) The new motorcycle target negotiating process

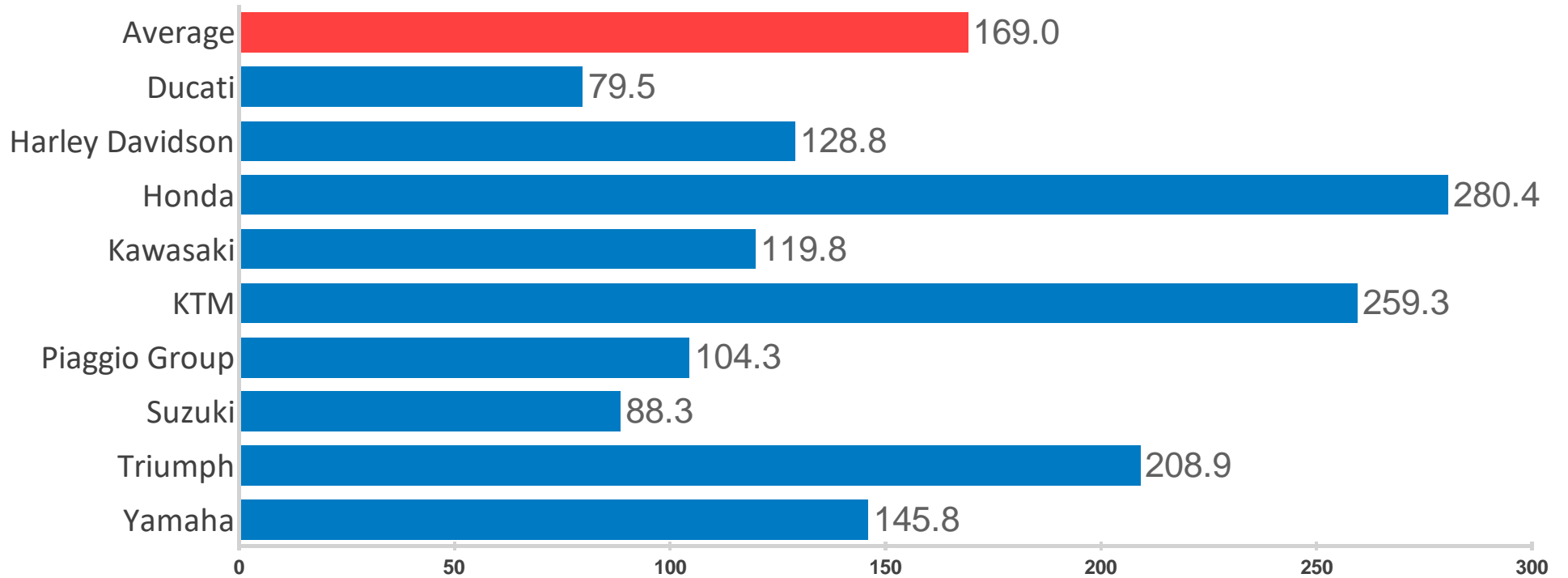


### PREVIOUS SURVEY RESULTS – AUTUMN 2017

7b: Your new motorcycle target negotiating process			
Ducati	3.1	Triumph	2.2
Harley Davidson	4.0	Yamaha	2.7
Honda	2.5		
Kawasaki	2.8		
KTM	3.1		
Piaggio Group	2.0		
Suzuki	3.3	AVERAGE	2.7

**NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY**

Q7c) What is your annual target for this brand?

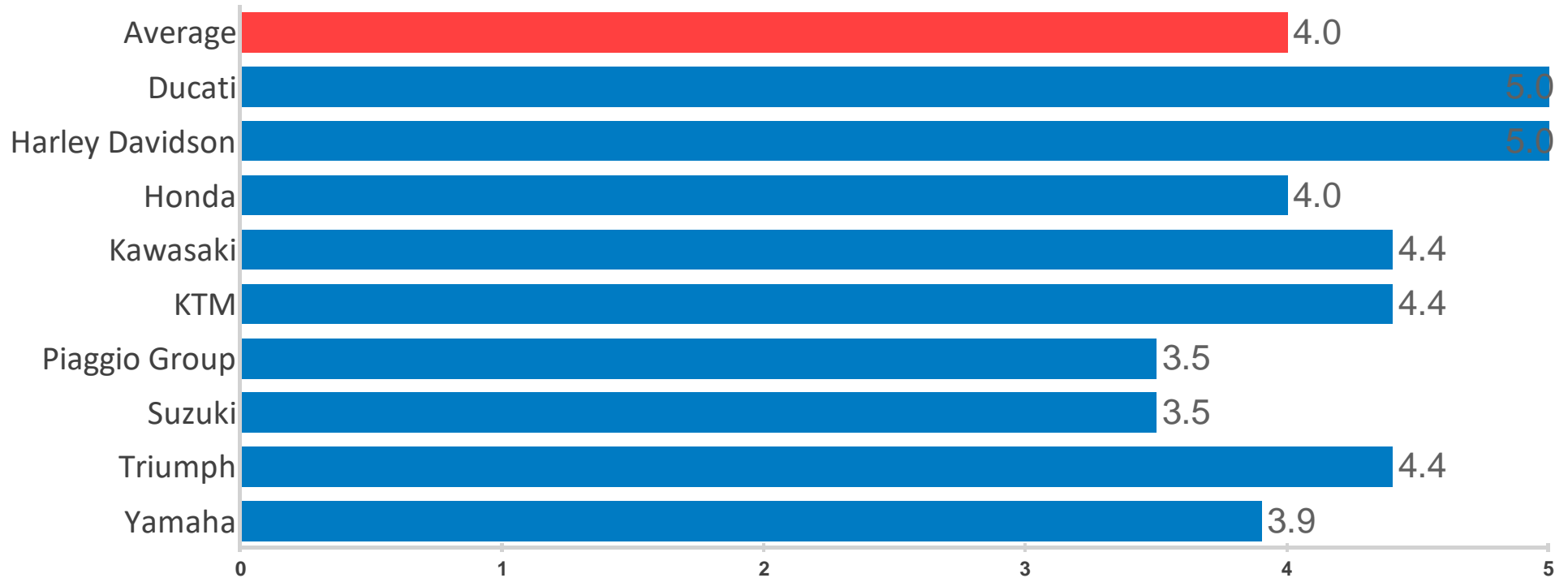


**PREVIOUS SURVEY RESULTS – AUTUMN 2017**

7c: What is your annual target for this brand			
Ducati	129.0	Triumph	190.4
Harley Davidson	237.1	Yamaha	152.4
Honda	274.8		
Kawasaki	115.4		
KTM	213.6		
Piaggio Group	141.4		
Suzuki	81.2	AVERAGE	176.1

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY

Q8 a) The brand image

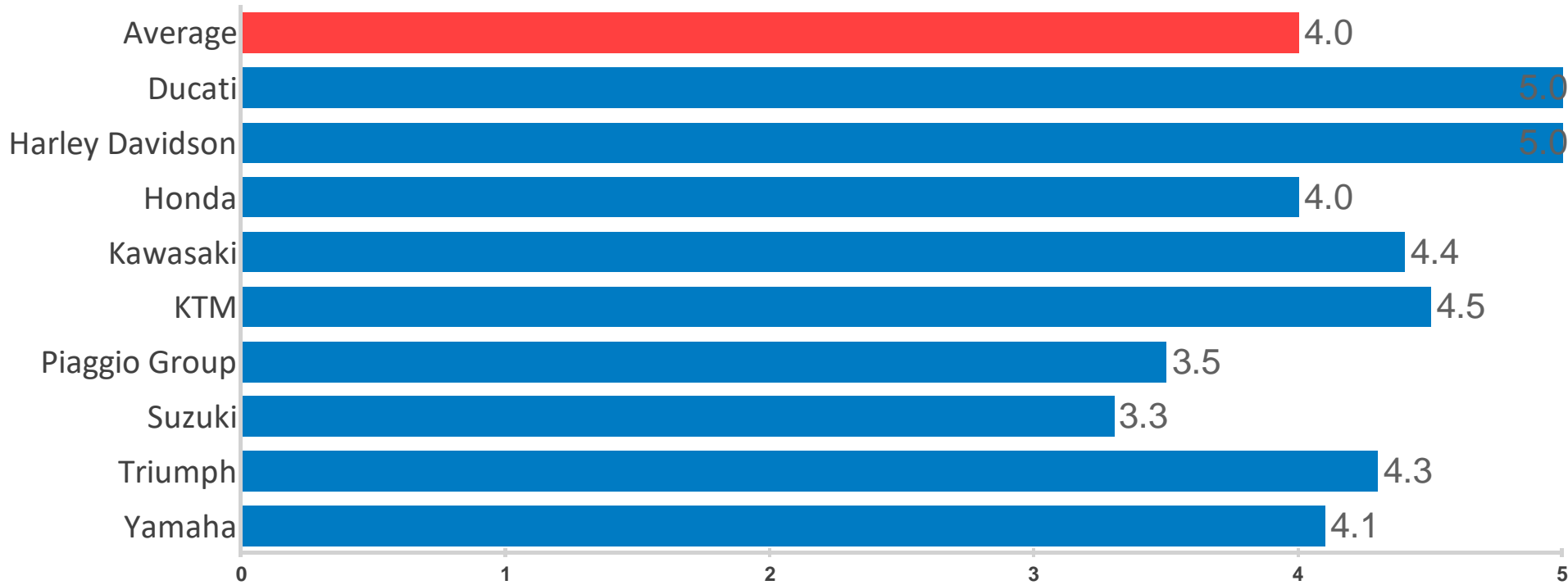


### PREVIOUS SURVEY RESULTS – AUTUMN 2017

8a: The brand image			
Ducati	4.4	Triumph	4.5
Harley Davidson	4.8	Yamaha	3.9
Honda	4.1		
Kawasaki	4.1		
KTM	4.4		
Piaggio Group	2.6		
Suzuki	3.7	AVERAGE	4.0

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY

Q8 b) The product image

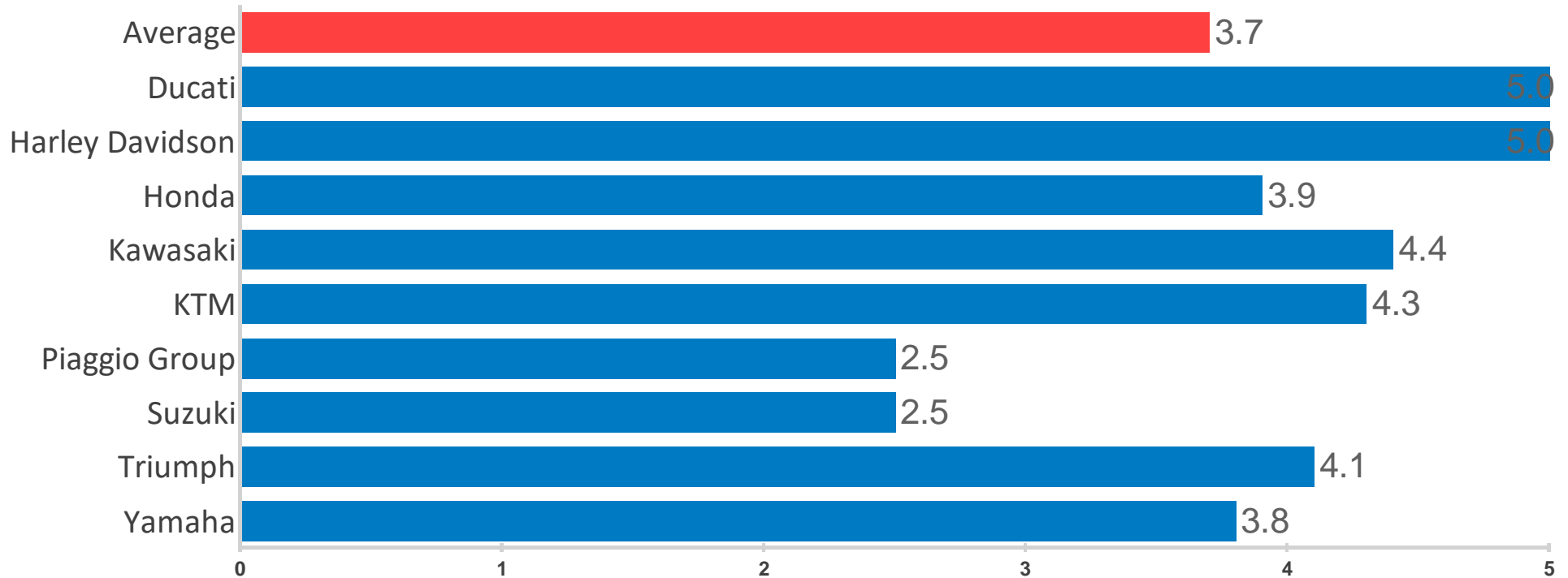


### PREVIOUS SURVEY RESULTS – AUTUMN 2017

8b: The product image			
Ducati	4.3	Triumph	4.3
Harley Davidson	4.8	Yamaha	4.0
Honda	4.1		
Kawasaki	4.2		
KTM	4.4		
Piaggio Group	2.8		
Suzuki	3.6	AVERAGE	4.0

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY

Q8 c) Frequency of introduction of new models



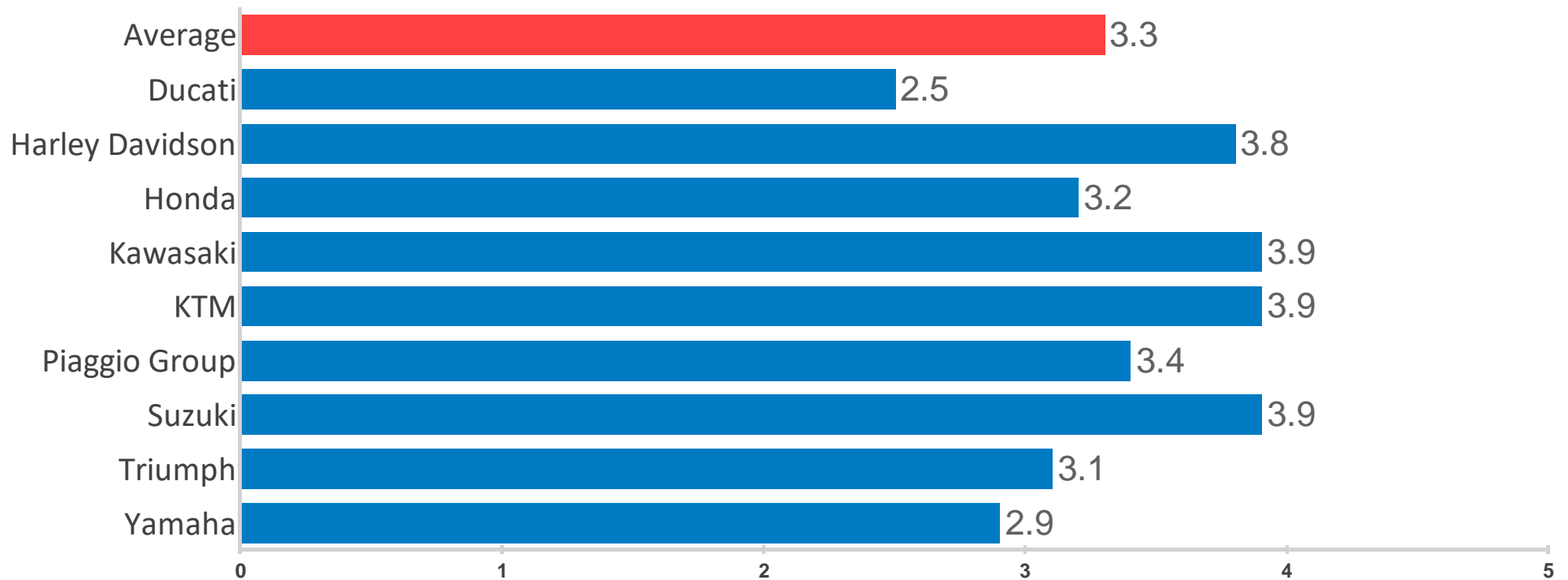
### PREVIOUS SURVEY RESULTS – AUTUMN 2017

8c: Frequency of introduction of new models			
Ducati	4.1	Triumph	4.2
Harley Davidson	4.5	Yamaha	3.9
Honda	3.9		
Kawasaki	4.0		
KTM	3.9		
Piaggio Group	2.1		
Suzuki	3.1	AVERAGE	3.7



## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY

Q8 d) Retail sales incentives and promotions

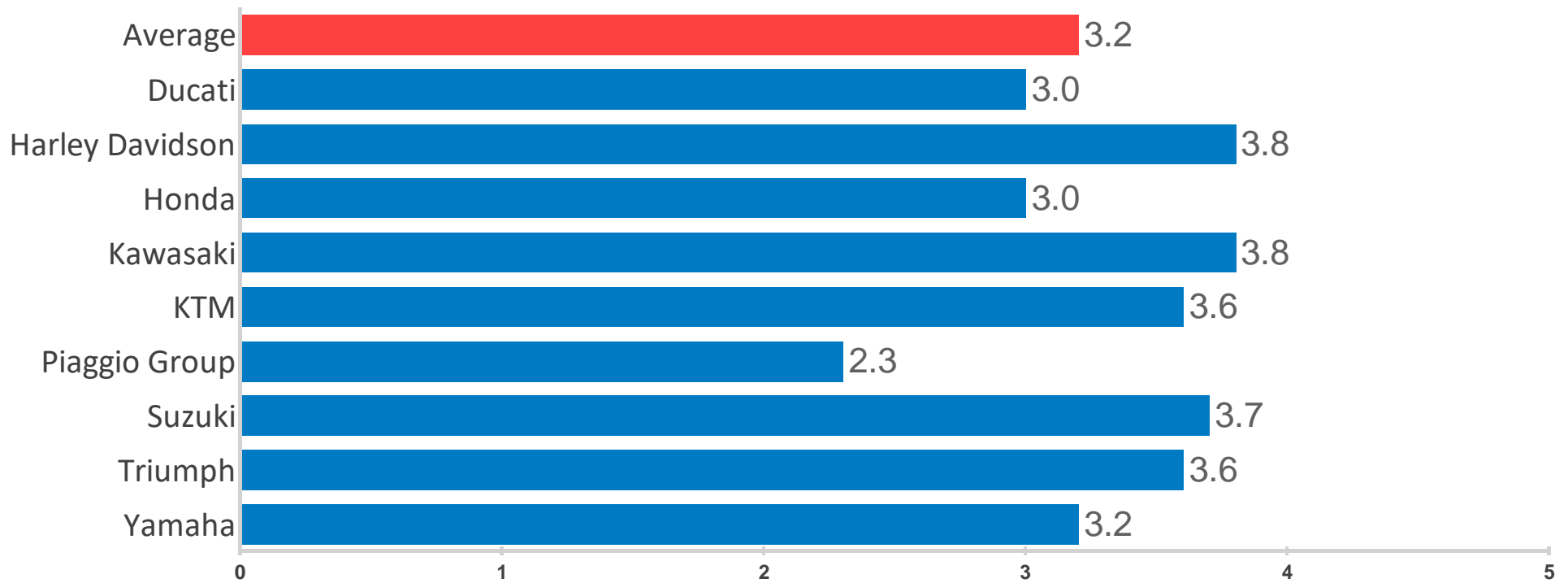


### PREVIOUS SURVEY RESULTS – AUTUMN 2017

8d: Retail sales incentives and promotions			
Ducati	3.3	Triumph	3.8
Harley Davidson	4.3	Yamaha	3.1
Honda	3.8		
Kawasaki	3.4		
KTM	3.5		
Piaggio Group	2.1		
Suzuki	3.6	AVERAGE	3.4

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY

### Q8 e) Product advertising

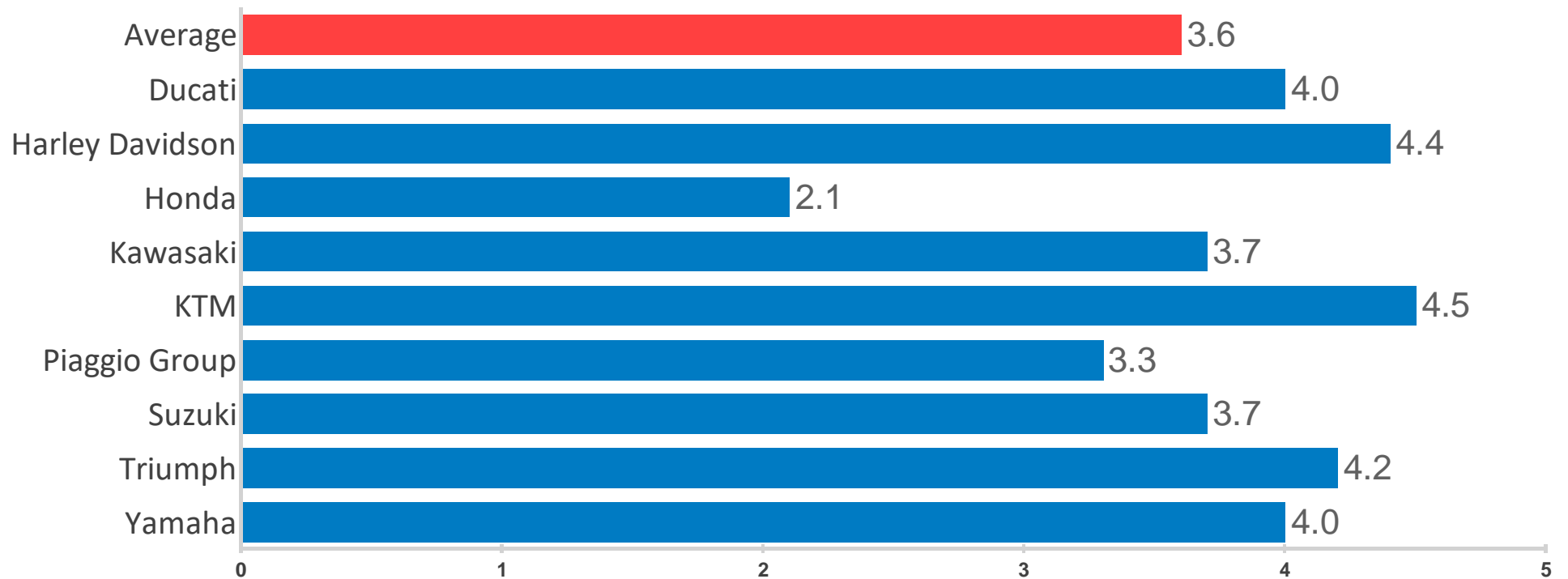


### PREVIOUS SURVEY RESULTS – AUTUMN 2017

8e: Product advertising			
Ducati	3.5	Triumph	3.9
Harley Davidson	4.0	Yamaha	3.2
Honda	3.5		
Kawasaki	3.3		
KTM	3.9		
Piaggio Group	1.5		
Suzuki	3.4	AVERAGE	3.3

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY

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

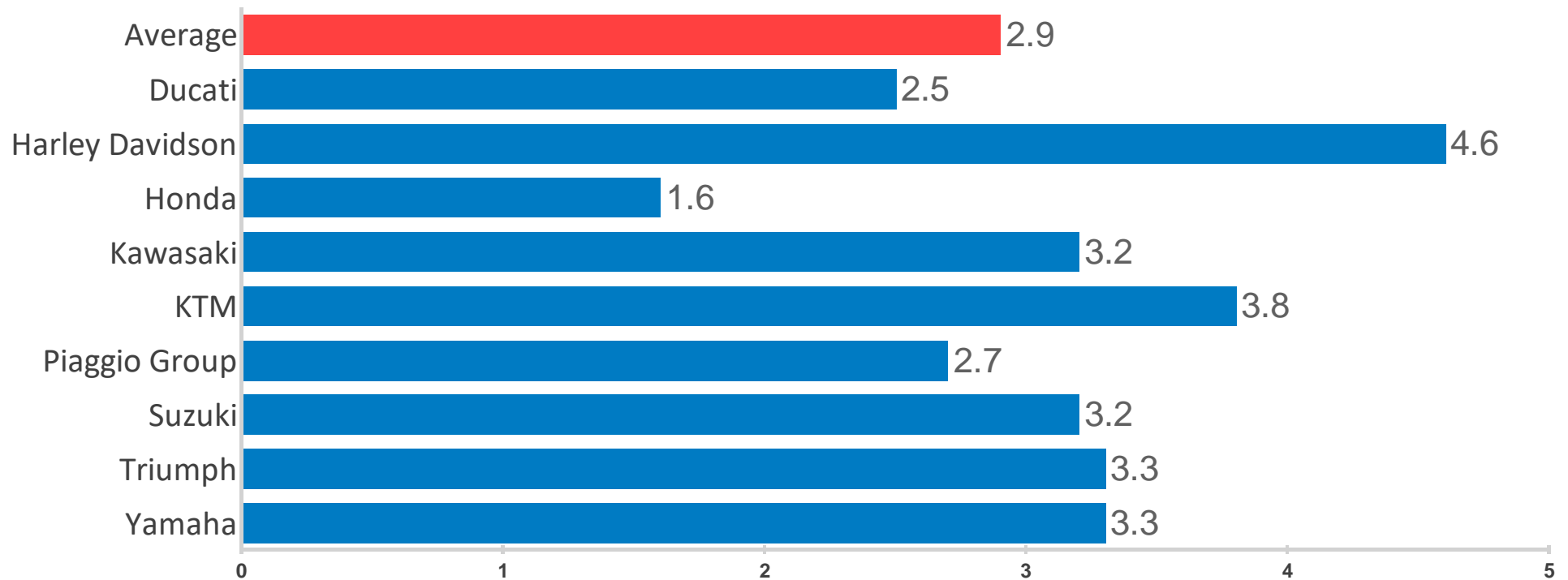


### PREVIOUS SURVEY RESULTS – AUTUMN 2017

8f: Have a comprehensive accessory offering that appeals to customers			
Ducati	3.8	Triumph	4.3
Harley Davidson	4.8	Yamaha	3.7
Honda	2.7		
Kawasaki	3.0		
KTM	4.3		
Piaggio Group	2.5		
Suzuki	3.5	AVERAGE	3.4

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY

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

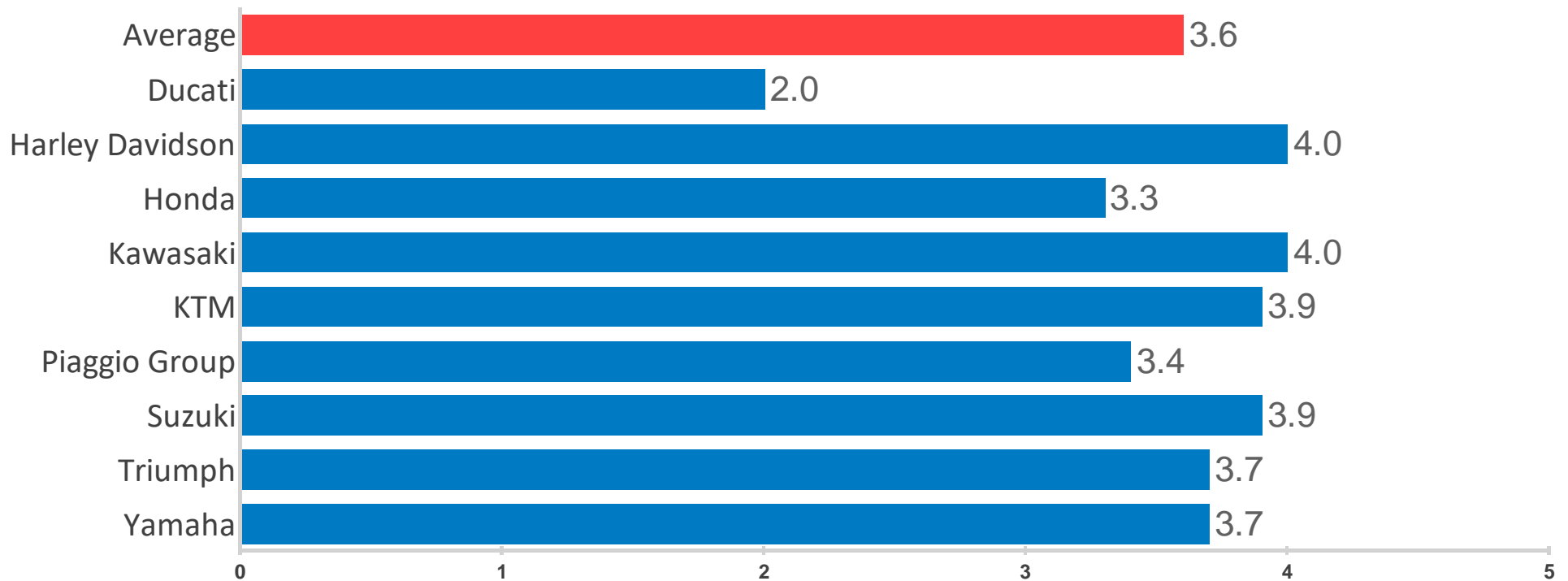


### PREVIOUS SURVEY RESULTS – AUTUMN 2017

8g: Have a comprehensive clothing offering that appeals to customers			
Ducati	3.2	Triumph	3.6
Harley Davidson	4.9	Yamaha	3.3
Honda	2.5		
Kawasaki	2.6		
KTM	4.2		
Piaggio Group	1.7		
Suzuki	3.1	AVERAGE	3.0

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY

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

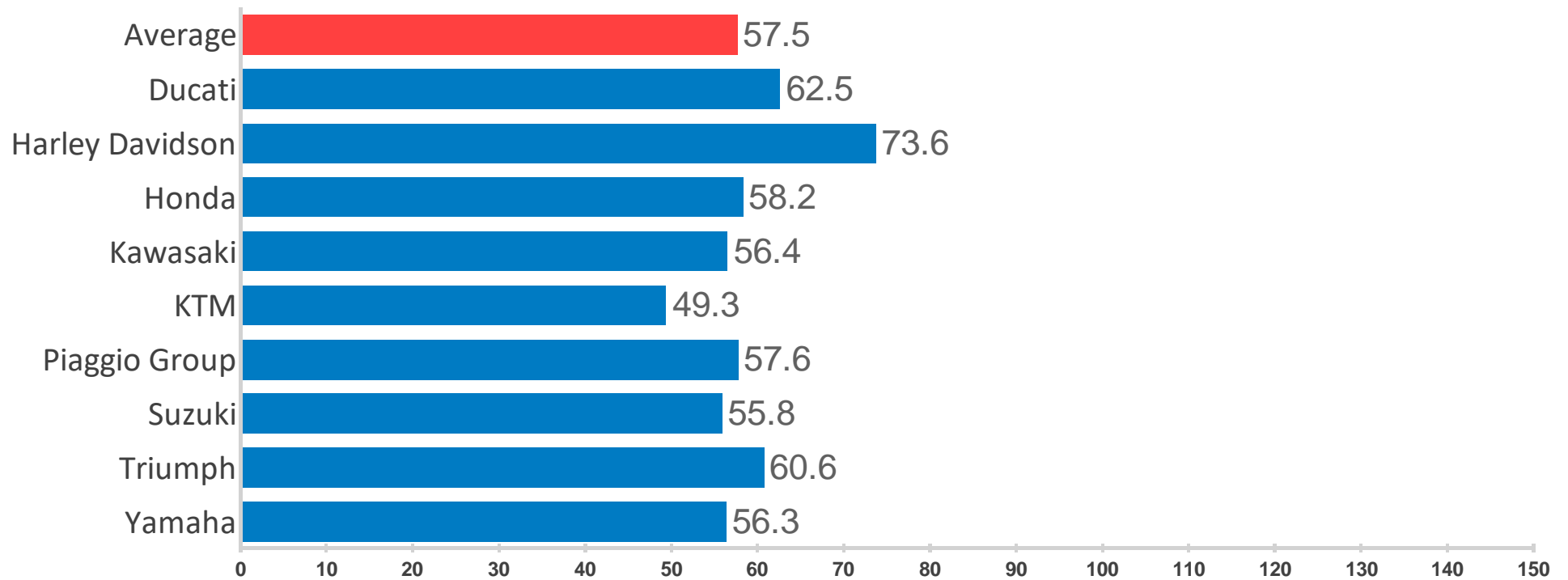


### PREVIOUS SURVEY RESULTS – AUTUMN 2017

9: The fairness of your manufacturer's warranty policy			
Ducati	2.3	Triumph	3.4
Harley Davidson	4.2	Yamaha	3.5
Honda	3.8		
Kawasaki	3.7		
KTM	3.6		
Piaggio Group	3.1		
Suzuki	3.7	AVERAGE	3.5

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY

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

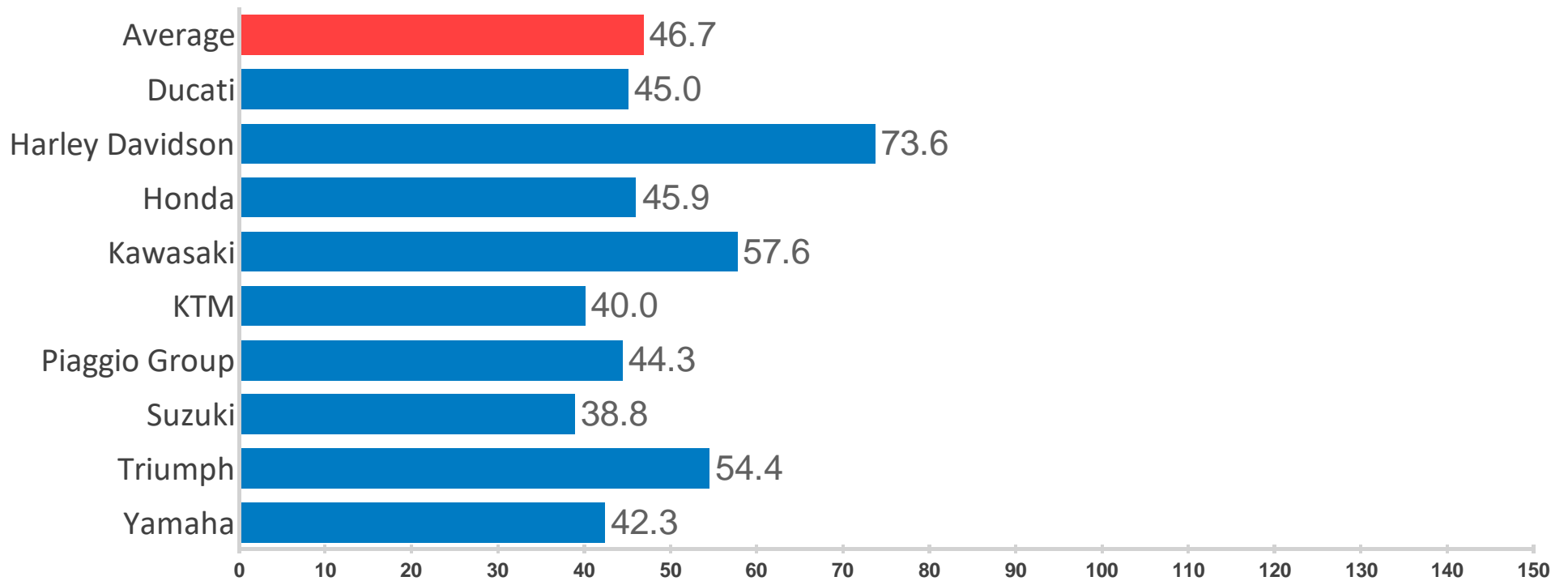


### PREVIOUS SURVEY RESULTS – AUTUMN 2017

10: What is your labour rate for retail (£)			
Ducati	70.1	Triumph	60.7
Harley Davidson	75.1	Yamaha	54.4
Honda	56.8		
Kawasaki	52.1		
KTM	55.2		
Piaggio Group	58.0		
Suzuki	50.6	AVERAGE	57.2

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY

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

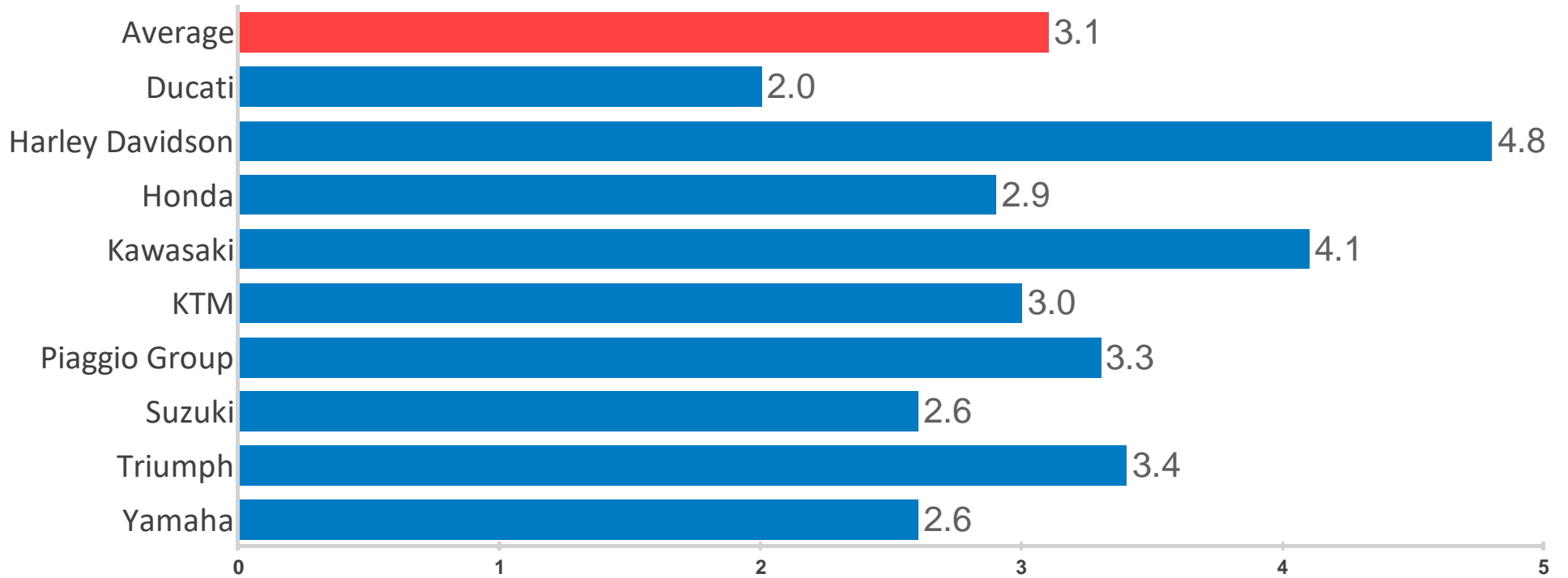


### PREVIOUS SURVEY RESULTS – AUTUMN 2017

11. What is your labour rate for warranty (£)			
Ducati	51.6	Triumph	50.4
Harley Davidson	75.1	Yamaha	37.1
Honda	46.0		
Kawasaki	48.3		
KTM	40.6		
Piaggio Group	40.2		
Suzuki	36.9	AVERAGE	44.9

**NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY**

Q12 a) Warranty labour rate



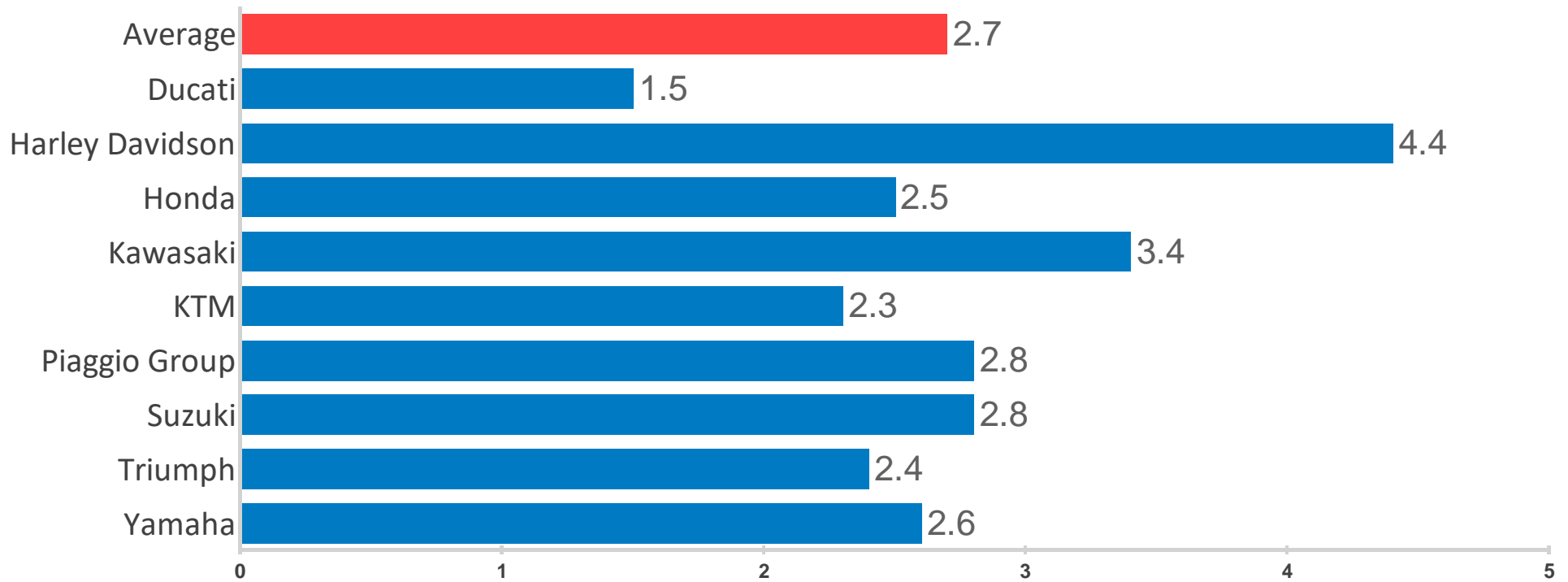
**PREVIOUS SURVEY RESULTS – AUTUMN 2017**

12a: Warranty labour rate			
Ducati	2.3	Triumph	3.6
Harley Davidson	5.0	Yamaha	2.3
Honda	3.2		
Kawasaki	3.5		
KTM	3.0		
Piaggio Group	3.0		
Suzuki	3.0	AVERAGE	3.1



## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY

Q12 b) Warranty time allowances

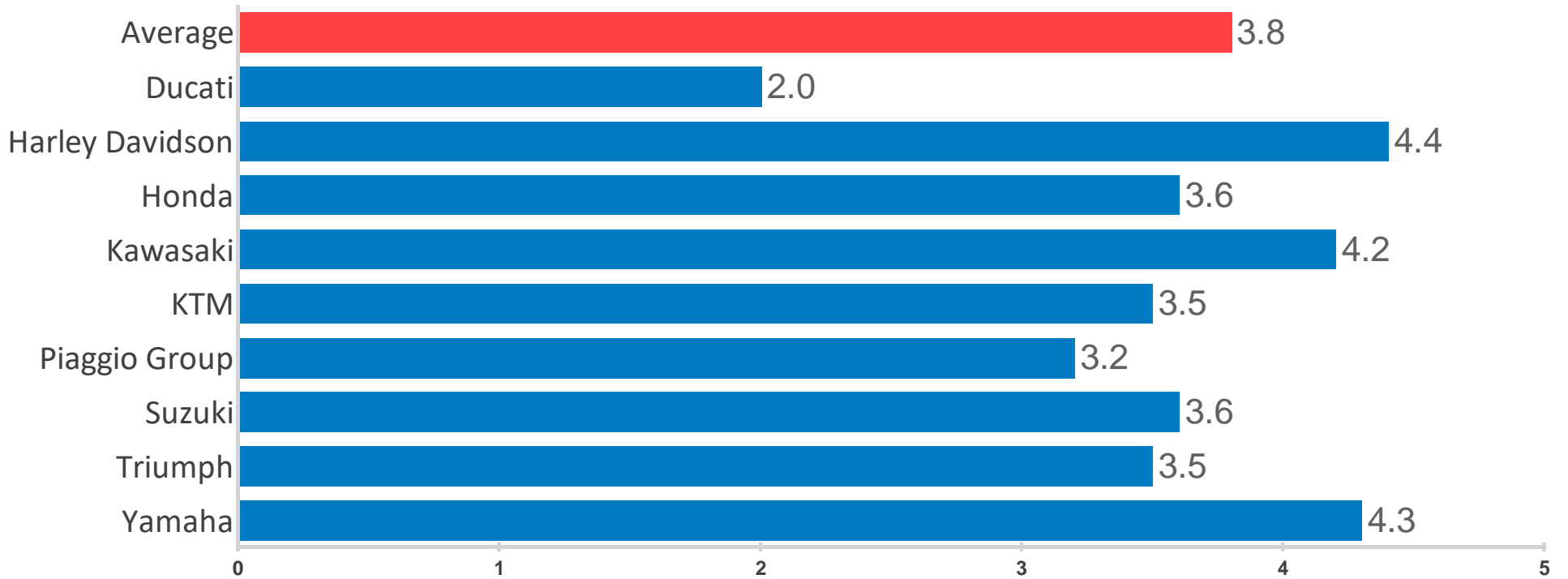


### PREVIOUS SURVEY RESULTS – AUTUMN 2017

12b: Warranty time allowances			
Ducati	1.7	Triumph	2.6
Harley Davidson	4.1	Yamaha	2.5
Honda	2.5		
Kawasaki	2.8		
KTM	2.5		
Piaggio Group	2.1		
Suzuki	2.9	AVERAGE	2.6

**NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY**

Q12 c) Warranty replacement parts policy

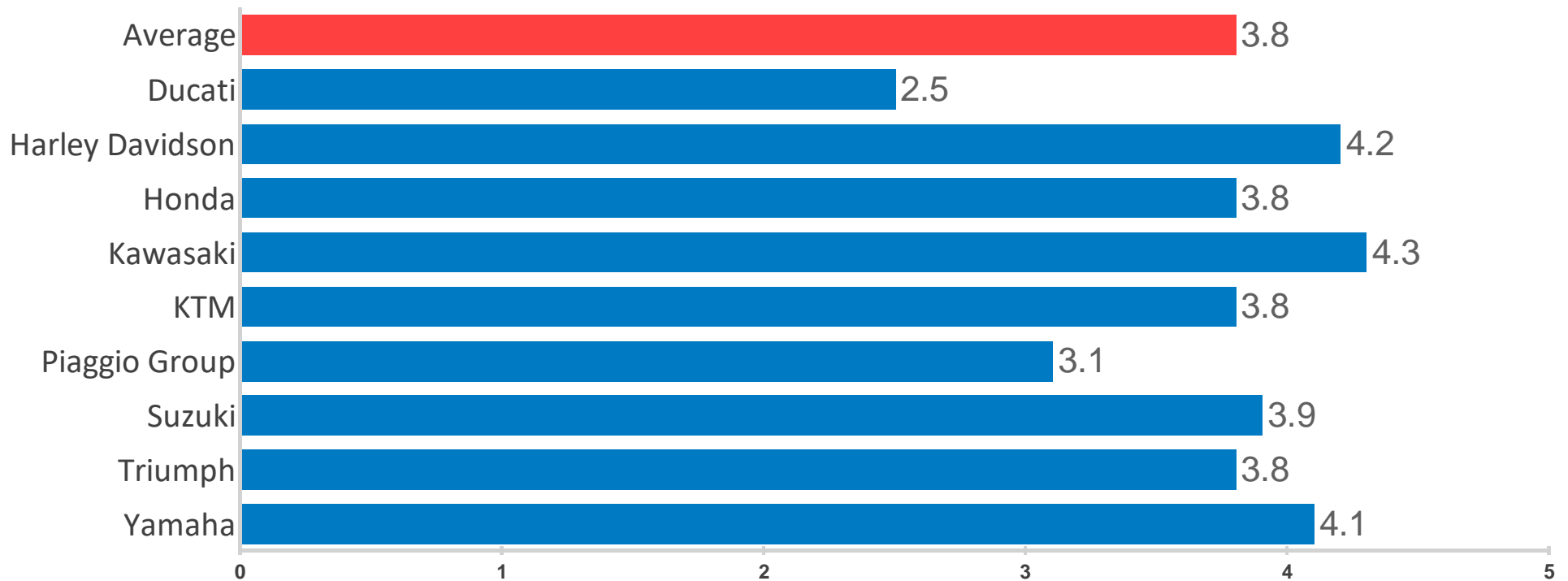


**PREVIOUS SURVEY RESULTS – AUTUMN 2017**

<b>12c: Warranty replacement parts policy</b>			
Ducati	2.8	Triumph	3.8
Harley Davidson	4.4	Yamaha	4.0
Honda	3.5		
Kawasaki	3.8		
KTM	3.5		
Piaggio Group	2.4		
Suzuki	3.5	AVERAGE	3.5

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY

Q12 d) Timely and fair settlement of warranty claims

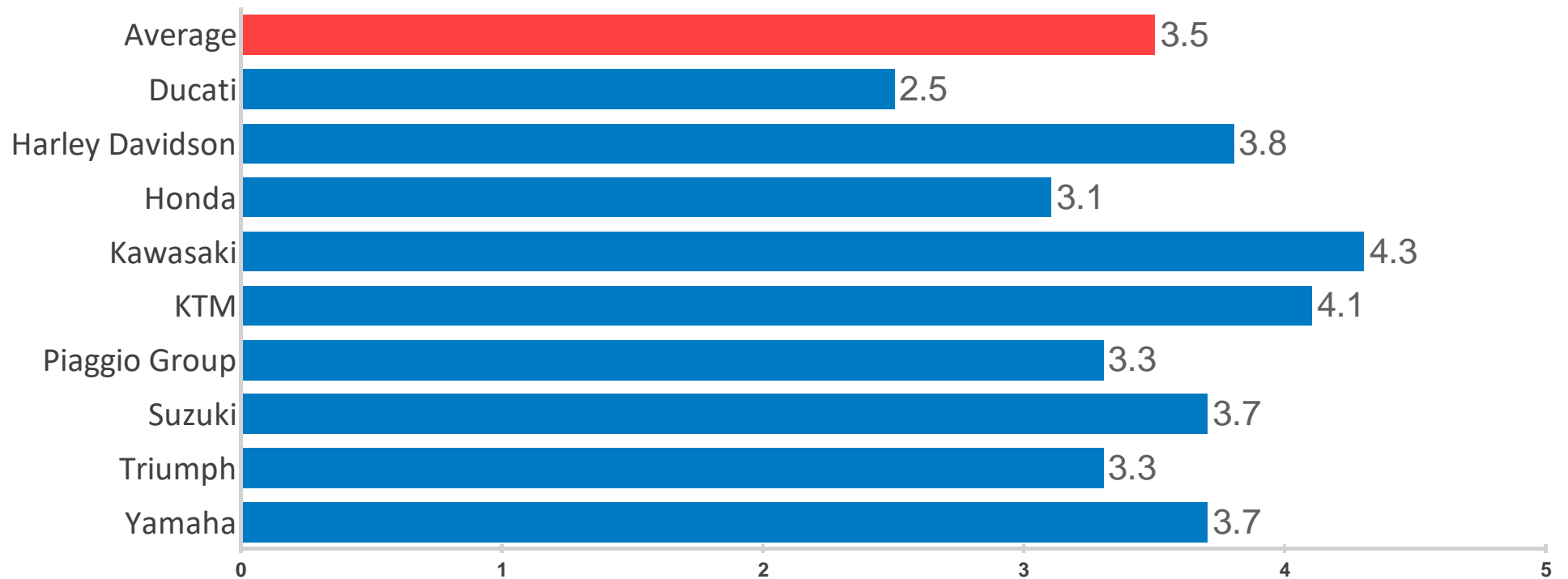


### PREVIOUS SURVEY RESULTS – AUTUMN 2017

12d: Timely and fair settlement of warranty claims			
Ducati	2.9	Triumph	3.8
Harley Davidson	4.9	Yamaha	3.9
Honda	3.7		
Kawasaki	3.9		
KTM	3.6		
Piaggio Group	2.6		
Suzuki	3.8	AVERAGE	3.6

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY

Q12 e) Quality and availability of technical support

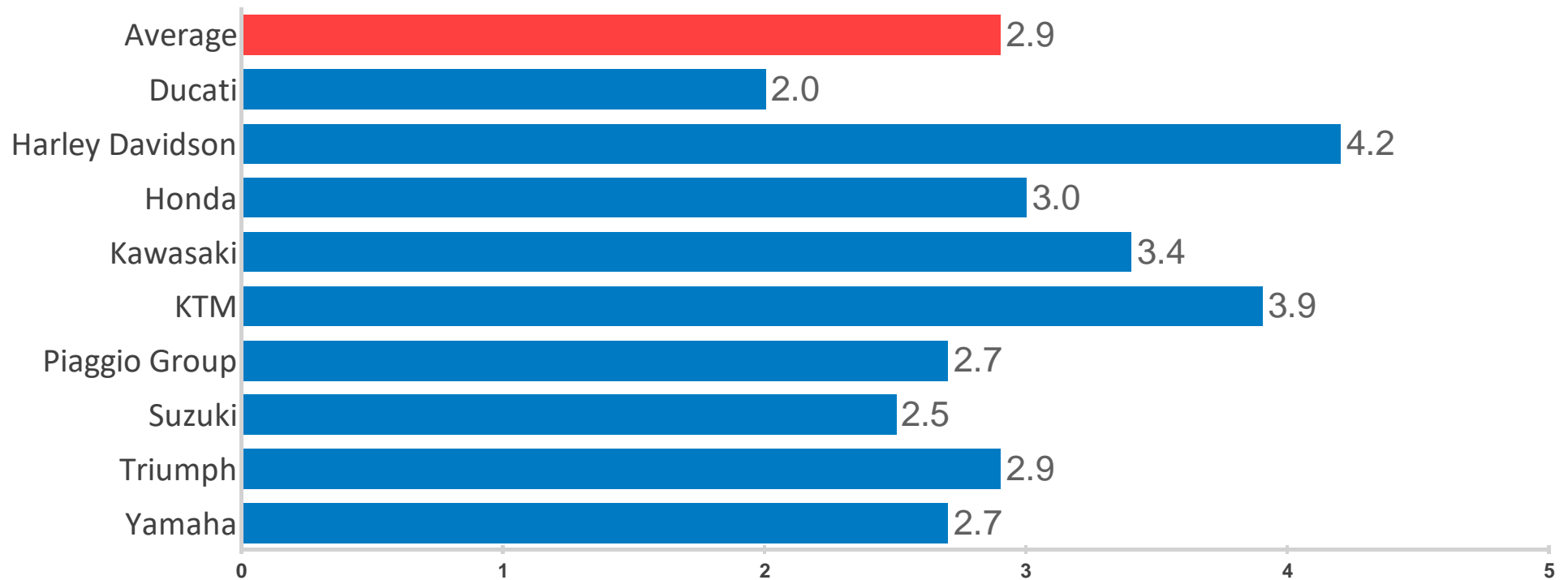


### PREVIOUS SURVEY RESULTS – AUTUMN 2017

12e: Quality and availability of technical support			
Ducati	2.3	Triumph	3.2
Harley Davidson	3.8	Yamaha	3.3
Honda	3.4		
Kawasaki	3.7		
KTM	3.7		
Piaggio Group	2.3		
Suzuki	3.6	AVERAGE	3.3

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY

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

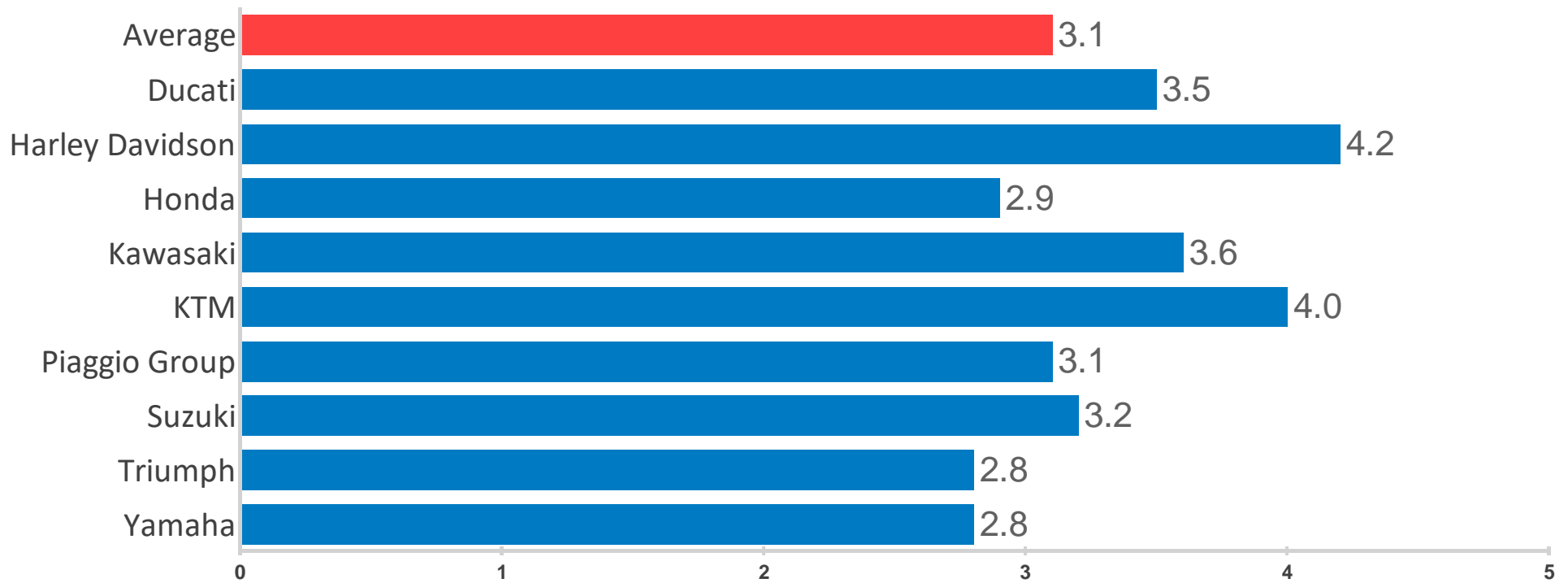


### PREVIOUS SURVEY RESULTS – AUTUMN 2017

13: The profit return by representing your franchise			
Ducati	2.4	Triumph	3.4
Harley Davidson	4.2	Yamaha	3.1
Honda	3.0		
Kawasaki	3.0		
KTM	3.5		
Piaggio Group	2.1		
Suzuki	2.8	AVERAGE	3.0

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY

Q14 a) The future profitability of your business

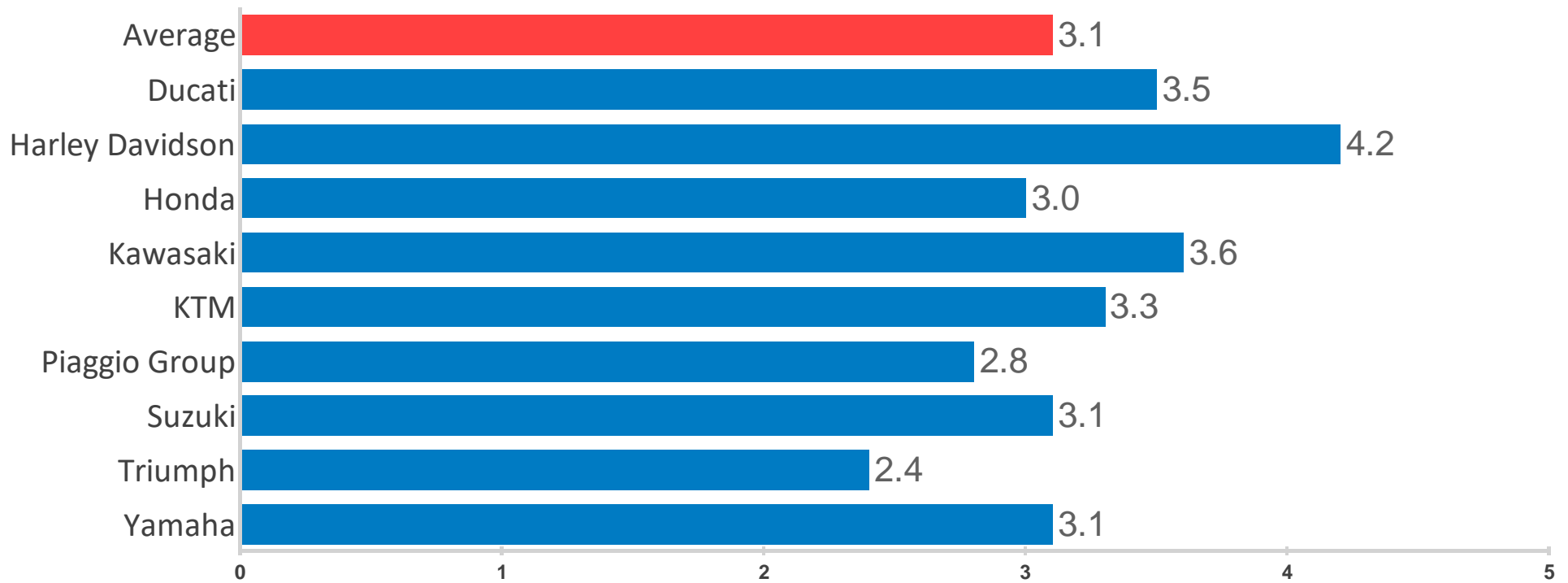


### PREVIOUS SURVEY RESULTS – AUTUMN 2017

14a: The future profitability of your business			
Ducati	3.1	Triumph	3.5
Harley Davidson	4.3	Yamaha	3.3
Honda	3.1		
Kawasaki	3.1		
KTM	3.7		
Piaggio Group	2.3		
Suzuki	2.9	AVERAGE	3.1

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY

Q14 b) Your stocking plan for this franchise

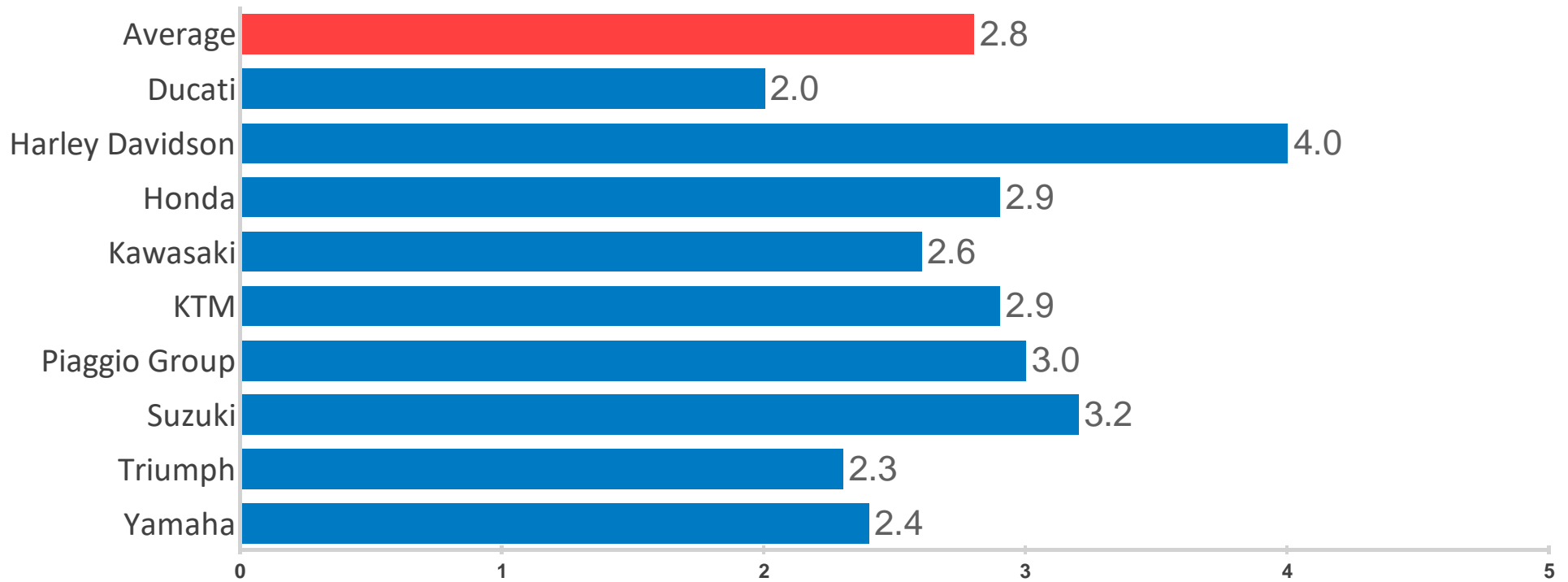


### PREVIOUS SURVEY RESULTS – AUTUMN 2017

14b: Your stocking plan for this franchise			
Ducati	2.9	Triumph	3.3
Harley Davidson	4.6	Yamaha	3.2
Honda	3.4		
Kawasaki	3.1		
KTM	3.5		
Piaggio Group	2.4		
Suzuki	3.0	AVERAGE	3.2

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY

Q15 a) The dealer standards expected by your manufacturer



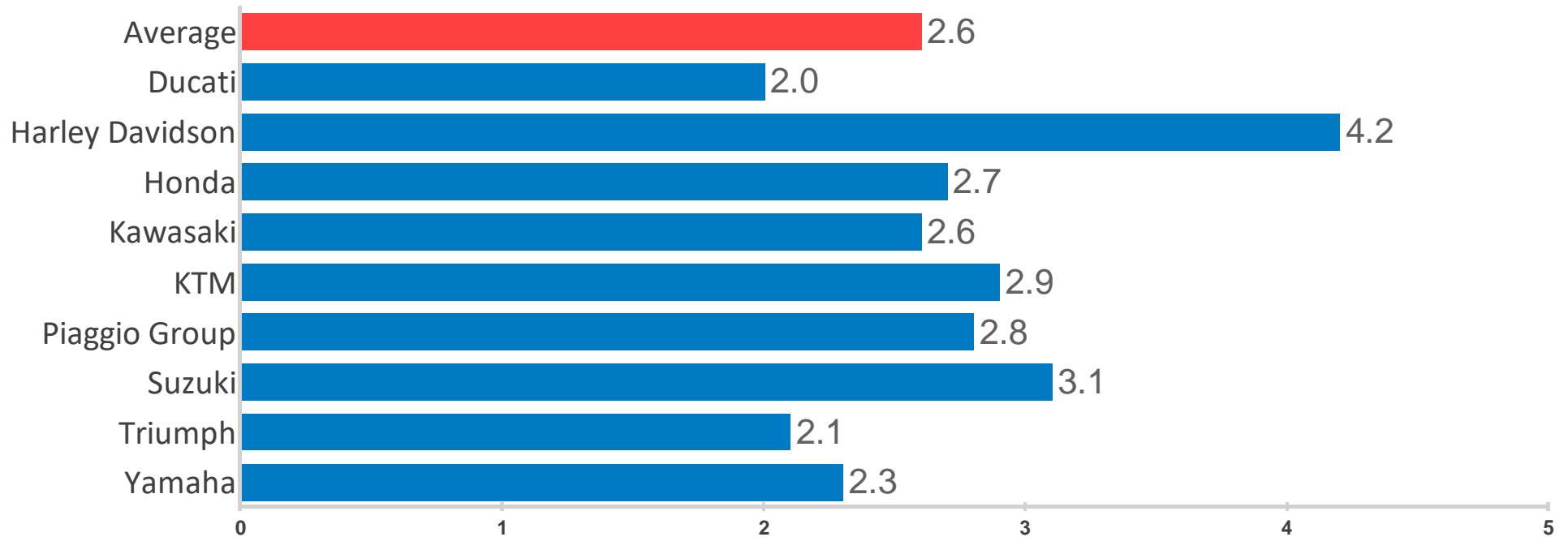
### PREVIOUS SURVEY RESULTS – AUTUMN 2017

15a: The dealer standards expected by your manufacturer			
Ducati	2.9	Triumph	2.7
Harley Davidson	4.1	Yamaha	2.4
Honda	3.0		
Kawasaki	2.2		
KTM	3.3		
Piaggio Group	2.3		
Suzuki	3.2	AVERAGE	2.8



## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY

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

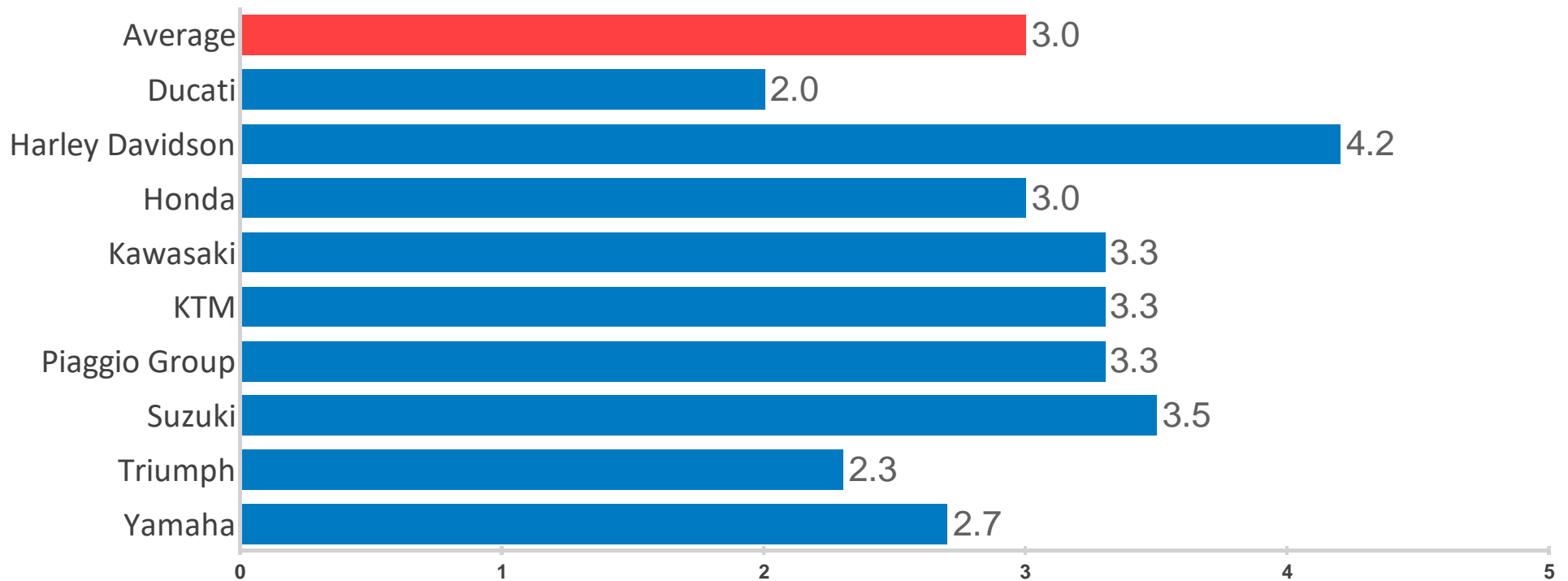


### PREVIOUS SURVEY RESULTS – AUTUMN 2017

15b: How realistic do you feel your manufacturer's standards are compared with the return on investment/reward			
Ducati	2.9	Triumph	2.4
Harley Davidson	4.2	Yamaha	2.2
Honda	2.8		
Kawasaki	2.4		
KTM	3.3		
Piaggio Group	2.0		
Suzuki	3.0	AVERAGE	2.7

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY

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

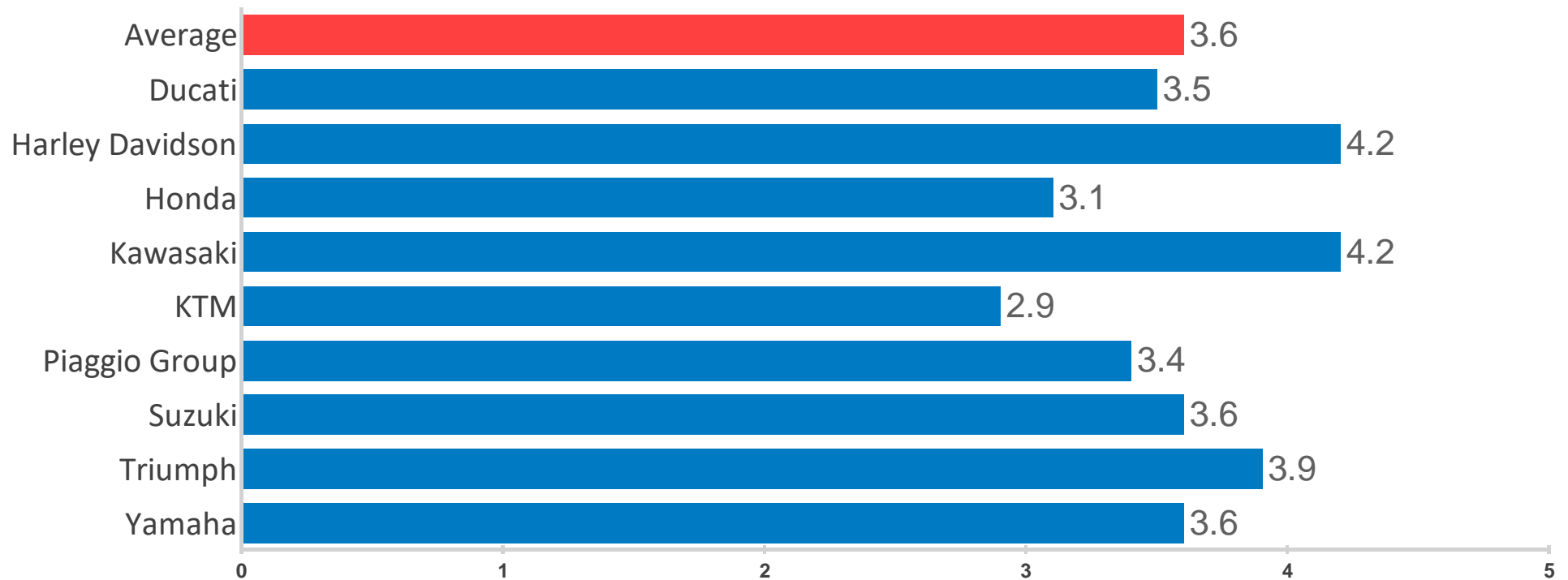


### PREVIOUS SURVEY RESULTS – AUTUMN 2017

16a: That the management of your manufacturer takes dealers' views and opinions into account			
Ducati	2.0	Triumph	2.9
Harley Davidson	4.0	Yamaha	3.0
Honda	3.2		
Kawasaki	3.4		
KTM	3.5		
Piaggio Group	2.3		
Suzuki	3.3	AVERAGE	3.0

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY

Q16 b) The effectiveness of the field sales team

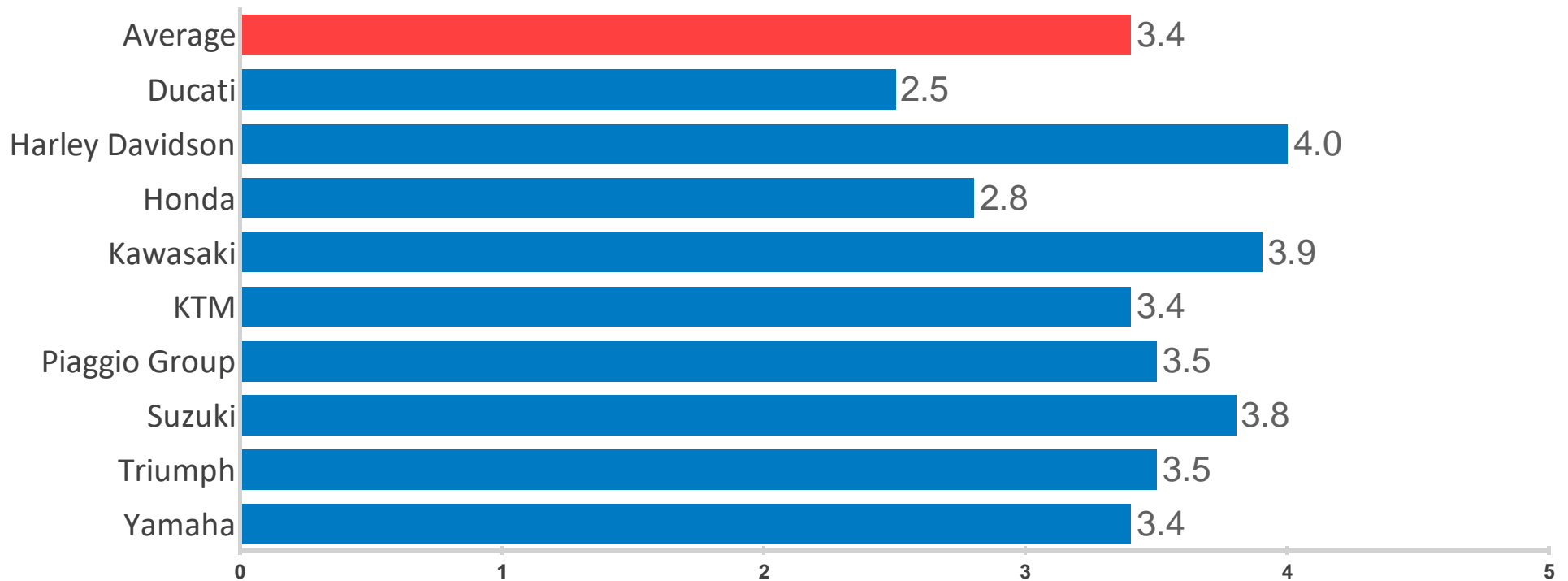


### PREVIOUS SURVEY RESULTS – AUTUMN 2017

16b: The effectiveness of your field sales team			
Ducati	3.6	Triumph	3.8
Harley Davidson	5.0	Yamaha	3.2
Honda	3.7		
Kawasaki	4.1		
KTM	3.6		
Piaggio Group	2.3		
Suzuki	3.6	AVERAGE	3.5

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY

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

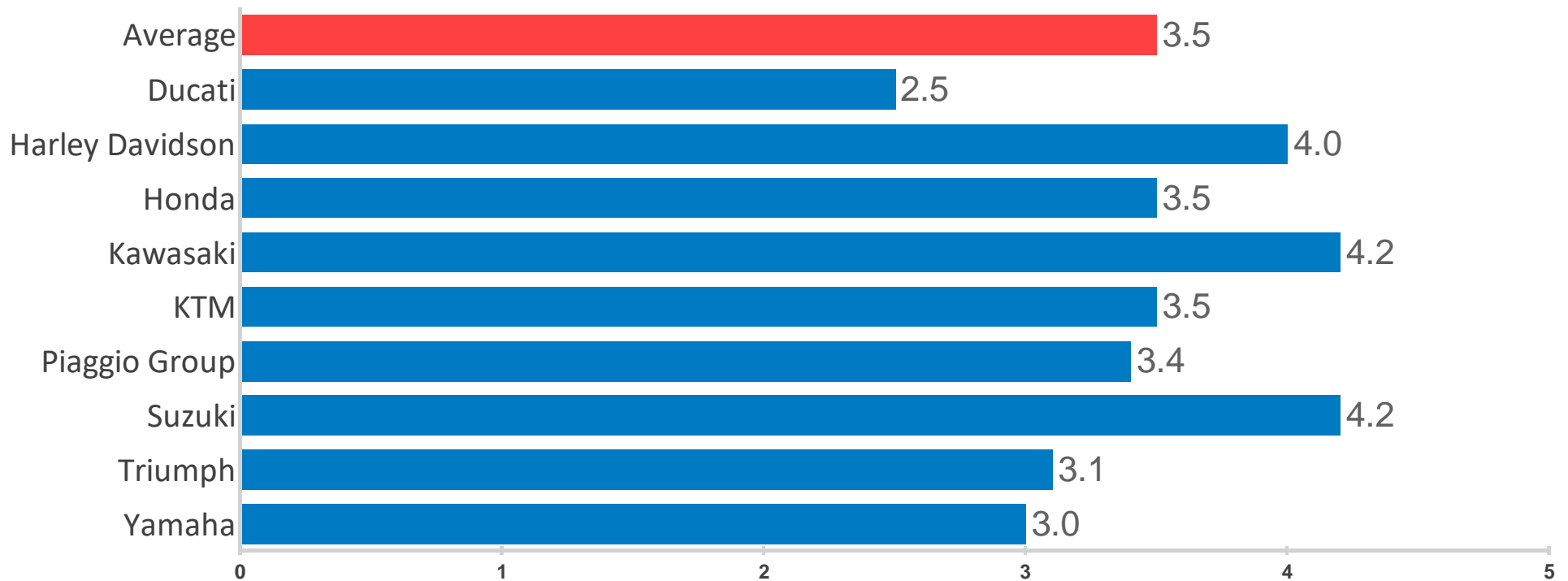


### PREVIOUS SURVEY RESULTS – AUTUMN 2017

16c: The effectiveness of the field service and parts staff			
Ducati	2.6	Triumph	3.4
Harley Davidson	4.9	Yamaha	2.9
Honda	3.3		
Kawasaki	3.7		
KTM	3.5		
Piaggio Group	2.8		
Suzuki	3.6	AVERAGE	3.3

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY

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

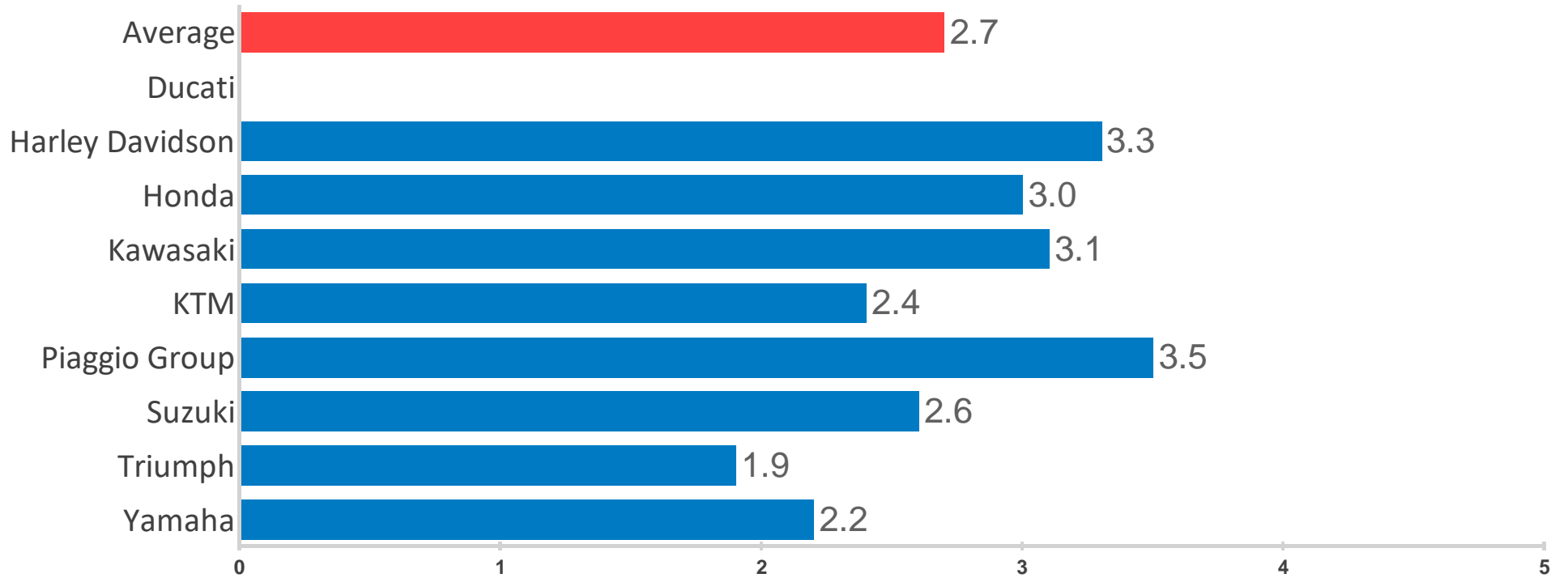


### PREVIOUS SURVEY RESULTS – AUTUMN 2017

16d: The effectiveness of your manufacturer's retail finance programme			
Ducati	3.5	Triumph	3.6
Harley Davidson	4.5	Yamaha	3.2
Honda	3.9		
Kawasaki	3.8		
KTM	3.5		
Piaggio Group	2.4		
Suzuki	3.6	AVERAGE	3.5

**NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY**

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

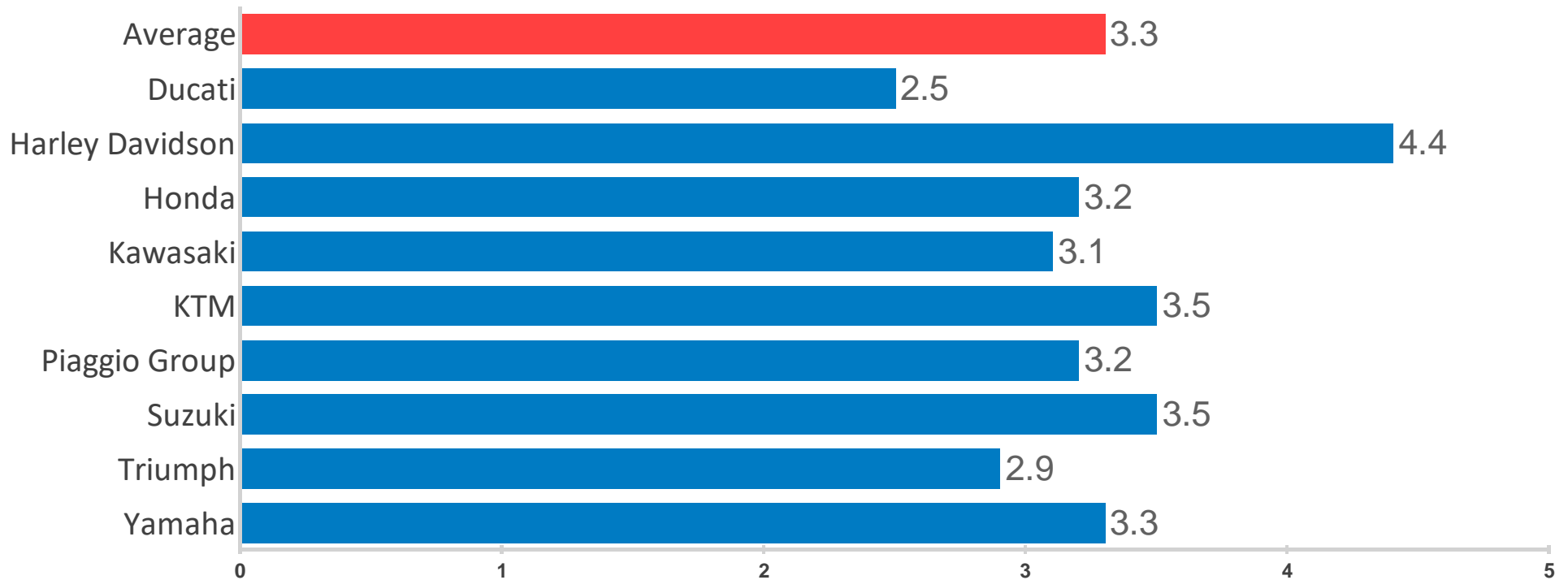


**PREVIOUS SURVEY RESULTS – AUTUMN 2017**

<b>16e: The effectiveness of your dealer council and dealer forums</b>			
Ducati	2.8	Triumph	2.3
Harley Davidson	3.6	Yamaha	1.9
Honda	3.6		
Kawasaki	2.6		
KTM	2.8		
Piaggio Group	1.4		
Suzuki	3.0	AVERAGE	2.8

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY

Q17 a) The routine procedures and controls expected

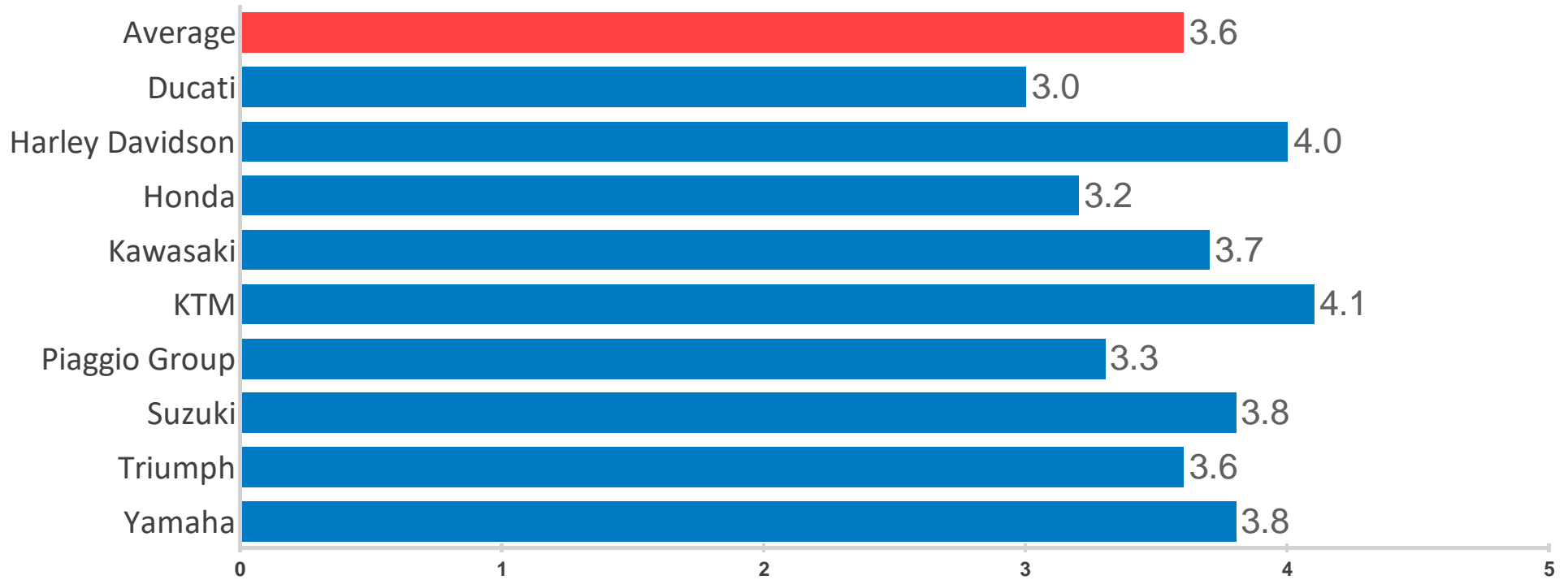


### PREVIOUS SURVEY RESULTS – AUTUMN 2017

17a: The routine procedures and controls expected			
Ducati	3.1	Triumph	3.5
Harley Davidson	4.8	Yamaha	2.8
Honda	3.1		
Kawasaki	3.0		
KTM	3.5		
Piaggio Group	2.2		
Suzuki	3.3	AVERAGE	3.1

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY

Q17 b) The quality of your manufacturer's training



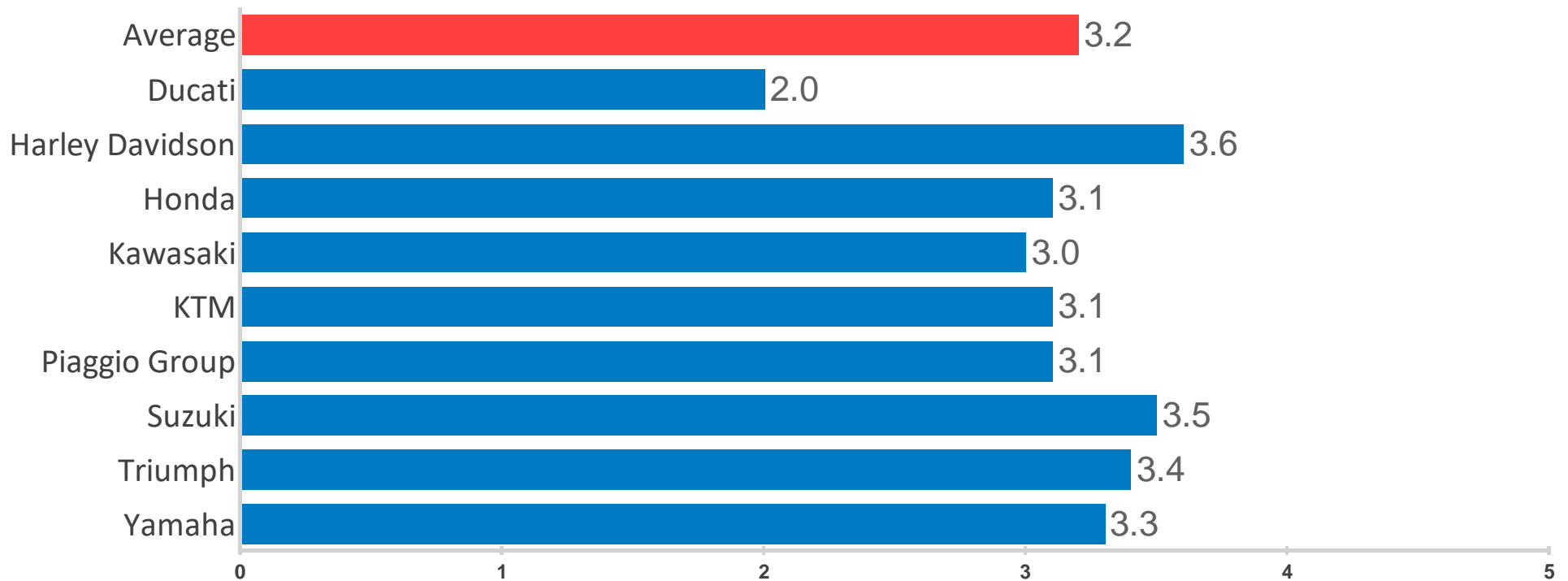
### PREVIOUS SURVEY RESULTS – AUTUMN 2017

17b: The quality of your manufacturer's training			
Ducati	3.5	Triumph	3.5
Harley Davidson	4.5	Yamaha	3.5
Honda	3.4		
Kawasaki	3.6		
KTM	3.9		
Piaggio Group	2.3		
Suzuki	3.6	AVERAGE	3.5



## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY

Q17 c) The cost of your manufacturer's training

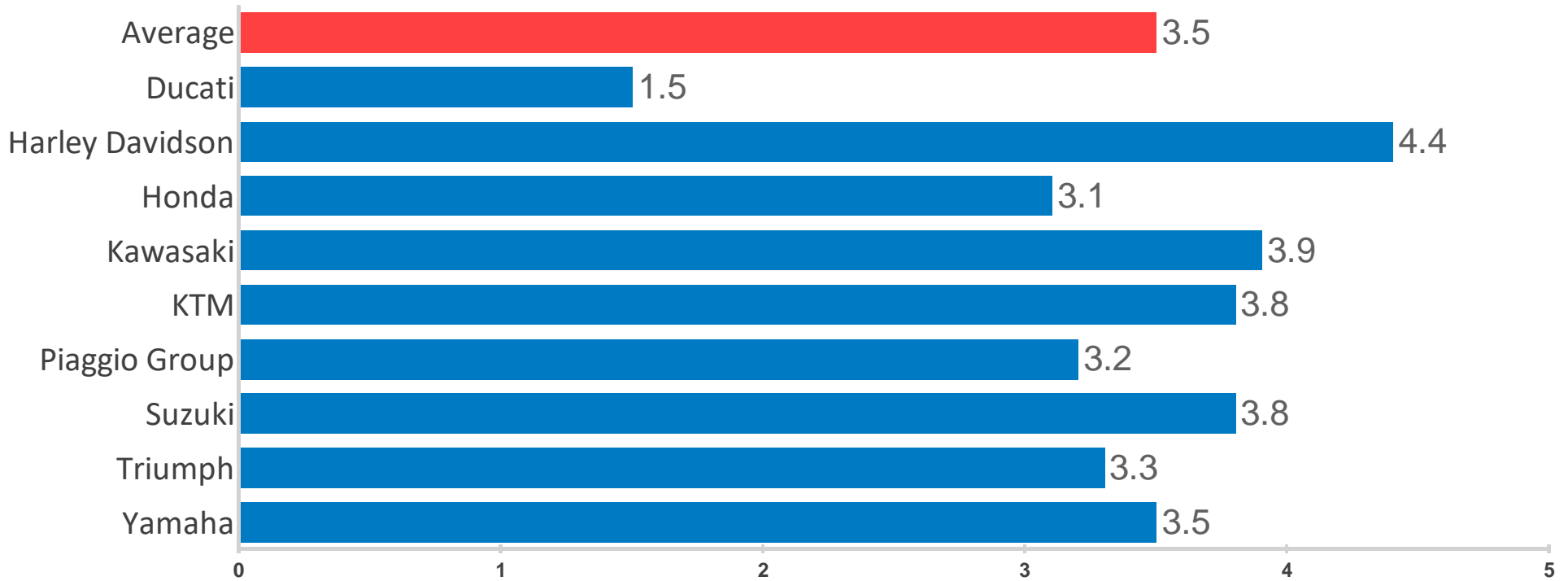


### PREVIOUS SURVEY RESULTS – AUTUMN 2017

17c: The cost of your manufacturer's training			
Ducati	2.8	Triumph	3.4
Harley Davidson	4.1	Yamaha	3.3
Honda	3.2		
Kawasaki	3.1		
KTM	3.1		
Piaggio Group	2.1		
Suzuki	3.4	AVERAGE	3.1

**NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY**

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

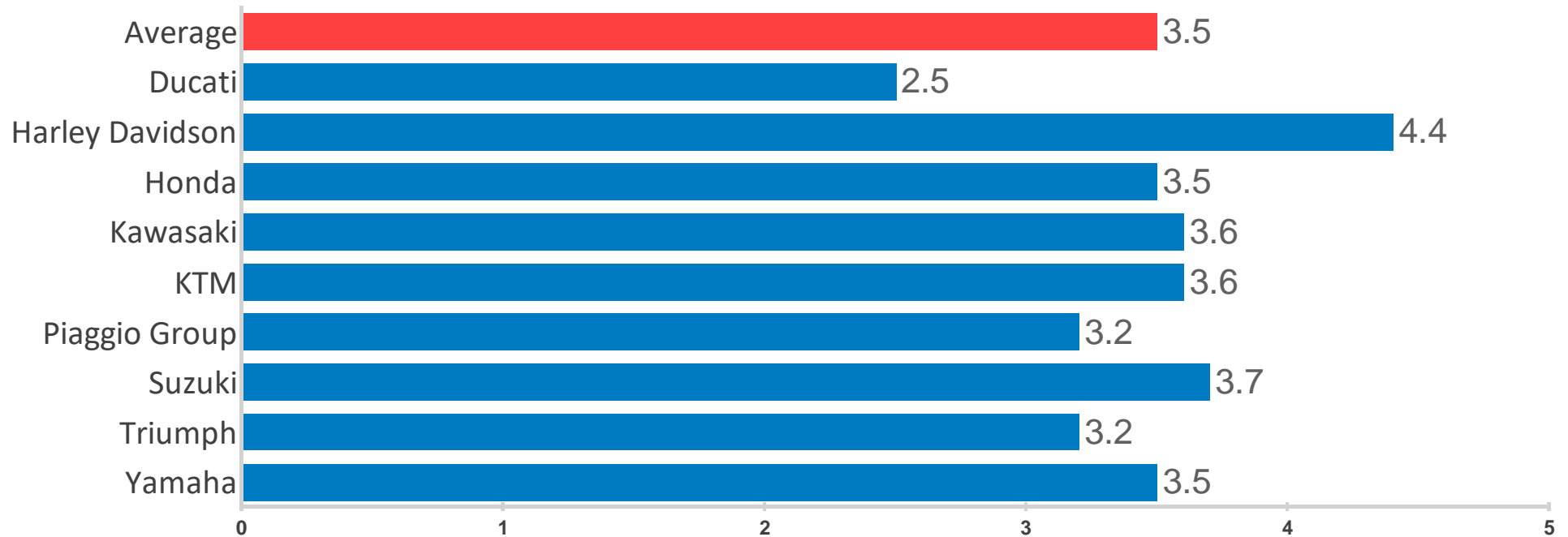


**PREVIOUS SURVEY RESULTS – AUTUMN 2017**

17d: Your ability to do business with your manufacturer on a day-to-day basis			
Ducati	2.6	Triumph	3.5
Harley Davidson	4.8	Yamaha	3.1
Honda	3.5		
Kawasaki	3.7		
KTM	3.6		
Piaggio Group	2.1		
Suzuki	3.5	AVERAGE	3.3

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY

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

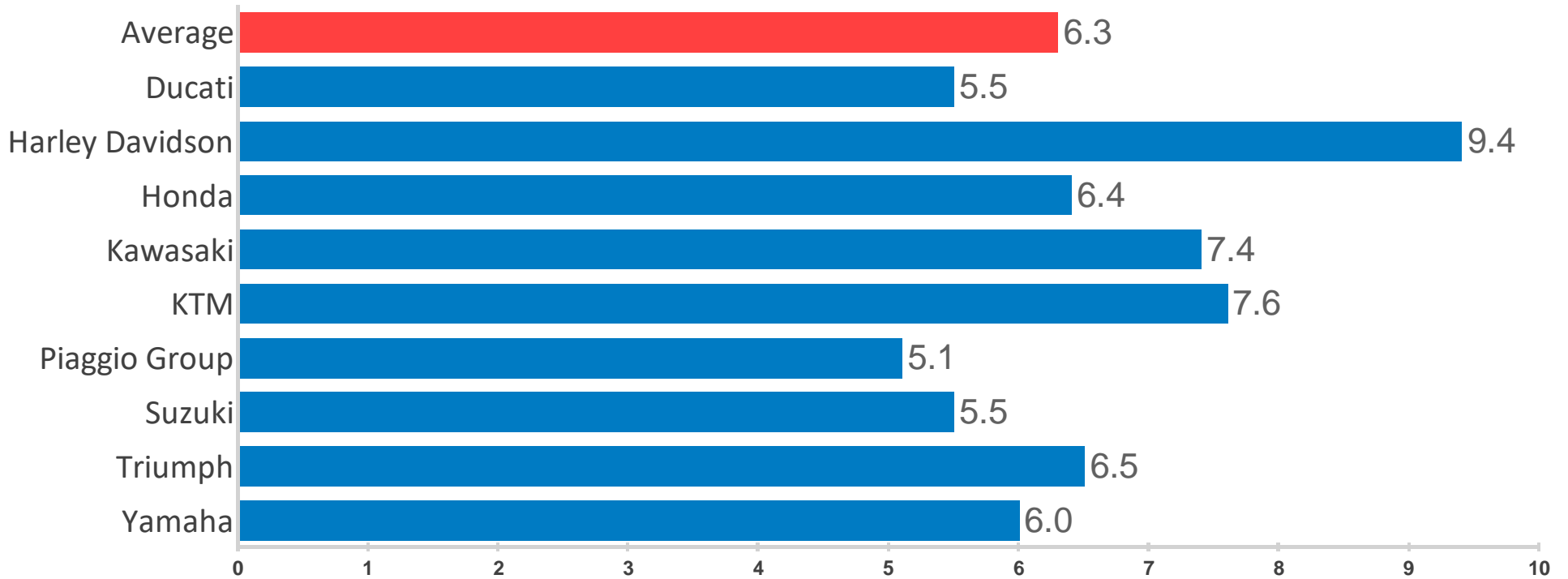


### PREVIOUS SURVEY RESULTS – AUTUMN 2017

17e: The support and assistance provided by your manufacturer to enable you to follow a professional sales process			
Ducati	3.4	Triumph	3.6
Harley Davidson	4.8	Yamaha	3.3
Honda	3.6		
Kawasaki	3.5		
KTM	3.4		
Piaggio Group	1.9		
Suzuki	3.4	AVERAGE	3.3

**NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY**

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



**PREVIOUS SURVEY RESULTS – AUTUMN 2017**

<b>18: Overall, how do you rate the value of holding your motorcycle franchise</b>			
Ducati	5.8	Triumph	7.2
Harley Davidson	9.0	Yamaha	5.9
Honda	6.6		
Kawasaki	6.8		
KTM	7.3		
Piaggio Group	3.7		
Suzuki	6.4	AVERAGE	6.3

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 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	4.6	Yamaha	3.3	Harley Davidson	4.4	Triumph	2.2
Kawasaki	4.0	Piaggio Group	2.4	Kawasaki	3.3	Ducati	2.0
KTM	4.0			KTM	3.3		
Suzuki	3.6			Suzuki	3.1		
Ducati	3.5			Piaggio Group	3.0		
Triumph	3.5			Honda	2.7		
Honda	3.3	Average	3.4	Yamaha	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	4.0	Suzuki	2.8	Harley Davidson	4.4	Yamaha	2.5
Ducati	3.5	Triumph	2.7	Ducati	4.0	Triumph	1.8
Kawasaki	3.3			Suzuki	3.1		
Yamaha	3.1			Kawasaki	2.9		
Honda	3.0			Piaggio Group	2.9		
KTM	2.9			Honda	2.8		
Piaggio Group	2.9	Average	3.0	KTM	2.6	Average	2.7

7c: What is your annual target for this brand				8a: The brand image			
Harley Davidson	280.4	Suzuki	88.3	Ducati	5.0	Piaggio Group	3.5
KTM	259.3	Ducati	79.5	Harley Davidson	5.0	Suzuki	3.5
Triumph	208.9			Kawasaki	4.4		
Yamaha	145.8			KTM	4.4		
Harley Davidson	128.8			Triumph	4.4		
Kawasaki	119.8			Honda	4.0		
Piaggio Group	104.3	Average	169.0	Yamaha	3.9	Average	4.0

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY

8b: The product image				8c: Frequency of introduction of new models			
Ducati	5.0	Piaggio Group	3.5	Ducati	5.0	Piaggio Group	2.5
Harley Davidson	5.0	Suzuki	3.3	Harley Davidson	5.0	Suzuki	2.5
KTM	4.5			Kawasaki	4.4		
Kawasaki	4.4			KTM	4.3		
Triumph	4.3			Triumph	4.1		
Yamaha	4.1			Honda	3.9		
Honda	4.0	Average	4.0	Yamaha	3.8	Average	3.7

8d: Retail sales incentives and promotions				8e: Product advertising			
Kawasaki	3.9	Yamaha	2.9	Harley Davidson	3.8	Honda	3.0
KTM	3.9	Ducati	2.5	Kawasaki	3.8	Piaggio Group	2.3
Suzuki	3.9			Suzuki	3.7		
Harley Davidson	3.8			KTM	3.6		
Piaggio Group	3.4			Triumph	3.6		
Honda	3.2			Yamaha	3.2		
Triumph	3.1	Average	3.3	Ducati	3.0	Average	3.2

8f: Have a comprehensive accessory offering that appeals to customers				8g: Have a comprehensive clothing offering that appeals to customers			
KTM	4.5	Piaggio Group	3.3	Harley Davidson	4.6	Ducati	2.5
Harley Davidson	4.4	Honda	2.1	KTM	3.8	Honda	1.6
Triumph	4.2			Triumph	3.3		
Ducati	4.0			Yamaha	3.3		
Yamaha	4.0			Kawasaki	3.2		
Kawasaki	3.7			Suzuki	3.2		
Suzuki	3.7	Average	3.6	Piaggio Group	2.7	Average	2.9

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY

9: Your manufacturer's warranty policy				10: What is your labour rate for retail before VAT (£)			
Harley Davidson	4.0	Honda	3.3	Harley Davidson	73.6	Suzuki	55.8
Kawasaki	4.0	Ducati	2.0	Ducati	62.5	KTM	49.3
KTM	3.9			Triumph	60.6		
Suzuki	3.9			Honda	58.2		
Triumph	3.7			Piaggio Group	57.6		
Yamaha	3.7			Kawasaki	56.4		
Piaggio Group	3.4	Average	3.6	Yamaha	56.3	Average	57.5

11: What is your labour rate for warranty before VAT (£)				12a: Warranty labour rate			
Harley Davidson	73.6	KTM	40.0	Harley Davidson	4.8	Yamaha	2.6
Kawasaki	57.6	Suzuki	38.8	Kawasaki	4.1	Ducati	2.0
Triumph	54.4			Triumph	3.4		
Honda	45.9			Piaggio Group	3.3		
Ducati	45.0			KTM	3.0		
Piaggio Group	44.3			Honda	2.9		
Yamaha	42.3	Average	46.7	Suzuki	2.6	Average	3.1

12b: Warranty replacement parts policy				12c: Warranty time allowances			
Harley Davidson	4.4	KTM	2.3	Harley Davidson	4.4	Piaggio Group	3.2
Kawasaki	3.4	Ducati	1.5	Yamaha	4.3	Ducati	2.0
Piaggio Group	2.8			Kawasaki	4.2		
Suzuki	2.8			Honda	3.6		
Yamaha	2.6			Suzuki	3.6		
Honda	2.5			KTM	3.5		
Triumph	2.4	Average	2.7	Triumph	3.5	Average	3.8

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY

12d: Timely and fair settlement of warranty claims				12e: Quality and availability of technical support			
Kawasaki	4.3	Piaggio Group	3.1	Kawasaki	4.3	Honda	3.1
Harley Davidson	4.2	Ducati	2.5	KTM	4.1	Ducati	2.5
Yamaha	4.1			Harley Davidson	3.8		
Suzuki	3.9			Suzuki	3.7		
Honda	3.8			Yamaha	3.7		
KTM	3.8			Piaggio Group	3.3		
Triumph	3.8	Average	3.8	Triumph	3.3	Average	3.5

13: The profit return by representing your franchise				14a: The future profitability of your business			
Harley Davidson	4.2	Suzuki	2.5	Harley Davidson	4.2	Triumph	2.8
KTM	3.9	Ducati	2.0	KTM	4.0	Yamaha	2.8
Kawasaki	3.4			Kawasaki	3.6		
Honda	3.0			Ducati	3.5		
Triumph	2.9			Suzuki	3.2		
Piaggio Group	2.7			Piaggio Group	3.1		
Yamaha	2.7	Average	2.9	Honda	2.9	Average	3.1

14b: Your stocking plan for this franchise				15a: The dealer standards expected by your manufacturer			
Harley Davidson	4.2	Piaggio Group	2.8	Harley Davidson	4.0	Triumph	2.3
Kawasaki	3.6	Triumph	2.4	Suzuki	3.2	Ducati	2.0
Ducati	3.5			Piaggio Group	3.0		
KTM	3.3			Honda	2.9		
Suzuki	3.1			KTM	2.9		
Yamaha	3.1			Kawasaki	2.6		
Honda	3.0	Average	3.1	Yamaha	2.4	Average	2.8



## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 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	Triumph	2.1	Harley Davidson	4.2	Triumph	2.3
Suzuki	3.1	Ducati	2.0	Suzuki	3.5	Ducati	2.0
KTM	2.9			Kawasaki	3.3		
Piaggio Group	2.8			KTM	3.3		
Honda	2.7			Piaggio Group	3.3		
Kawasaki	2.6			Honda	3.0		
Yamaha	2.3	Average	2.6	Yamaha	2.7	Average	3.0

16b: The effectiveness of your field sales team				16c: The effectiveness of the field service and parts staff			
Harley Davidson	4.2	Honda	3.1	Harley Davidson	4.0	Honda	2.8
Kawasaki	4.2	KTM	2.9	Kawasaki	3.9	Ducati	2.5
Triumph	3.9			Suzuki	3.8		
Suzuki	3.6			Piaggio Group	3.5		
Yamaha	3.6			Triumph	3.5		
Ducati	3.5			KTM	3.4		
Piaggio Group	3.4	Average	3.6	Yamaha	3.4	Average	3.4

16d: The effectiveness of your manufacturer's retail finance programme				16e: The effectiveness of your dealer council and dealer forums			
Kawasaki	4.2	Yamaha	3.0	Piaggio Group	3.5	Triumph	1.9
Suzuki	4.2	Ducati	2.5	Harley Davidson	3.3		
Harley Davidson	4.0			Kawasaki	3.1		
Honda	3.5			Honda	3.0		
KTM	3.5			Suzuki	2.6		
Piaggio	3.4			KTM	2.4		
Triumph	3.1			Yamaha	2.2	Average	2.7

## NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2018 SURVEY

17a: The routine procedures and controls expected				17b: The quality of your manufacturer's training			
Harley Davidson	4.4	Triumph	2.9	KTM	4.1	Honda	3.2
KTM	3.5	Ducati	2.5	Harley Davidson	4.0	Ducati	3.0
Suzuki	3.5			Suzuki	3.8		
Yamaha	3.3			Yamaha	3.8		
Honda	3.2			Kawasaki	3.7		
Piaggio Group	3.2			Triumph	3.6		
Kawasaki	3.1	Average	3.3	Piaggio Group	3.3	Average	3.6

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	3.6	Kawasaki	3.0	Harley Davidson	4.4	Honda	3.1
Suzuki	3.5	Ducati	2.0	Kawasaki	3.9	Ducati	1.5
Triumph	3.4			KTM	3.8		
Yamaha	3.3			Suzuki	3.8		
Honda	3.1			Yamaha	3.5		
KTM	3.1			Triumph	3.3		
Piaggio Group	3.1	Average	3.2	Piaggio Group	3.2	Average	3.5

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	4.4	Ducati	2.5	Harley Davidson	9.4	Suzuki	5.5
Suzuki	3.7			KTM	7.6	Piaggio Group	5.1
Kawasaki	3.6			Kawasaki	7.4		
KTM	3.6			Triumph	6.5		
Honda	3.5			Honda	6.4		
Yamaha	3.5			Yamaha	6.0		
Piaggio Group	3.2	Average	3.5	Ducati	5.5	Average	6.3