

NMDA

NATIONAL MOTORCYCLE DEALERS ASSOCIATION

NATIONAL MOTORCYCLE DEALERS ASSOCIATION

DEALER ATTITUDE SURVEY RESULTS

SPRING 2021

DEALER ATTITUDE SURVEY SPRING 2021

We are pleased to reveal the findings of the latest Motorcycle Dealer Attitude Survey conducted in March 2021 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).

NB:

**National Motorcycle Dealers Association
Paddy O'Connell – Head of Association**

TEL: 07436 404102 Email: Patrick.oconnell@rmif.co.uk



**BMW
MOTORRAD**



lexmoto



Kawasaki

TRIUMPH

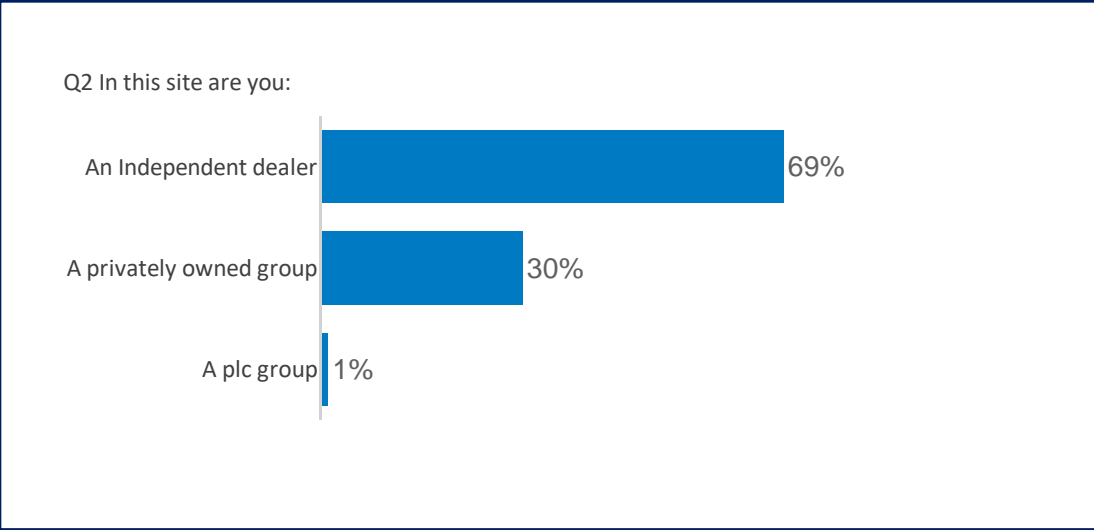


NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2021 SURVEY

BREAKDOWN OF RESPONSES

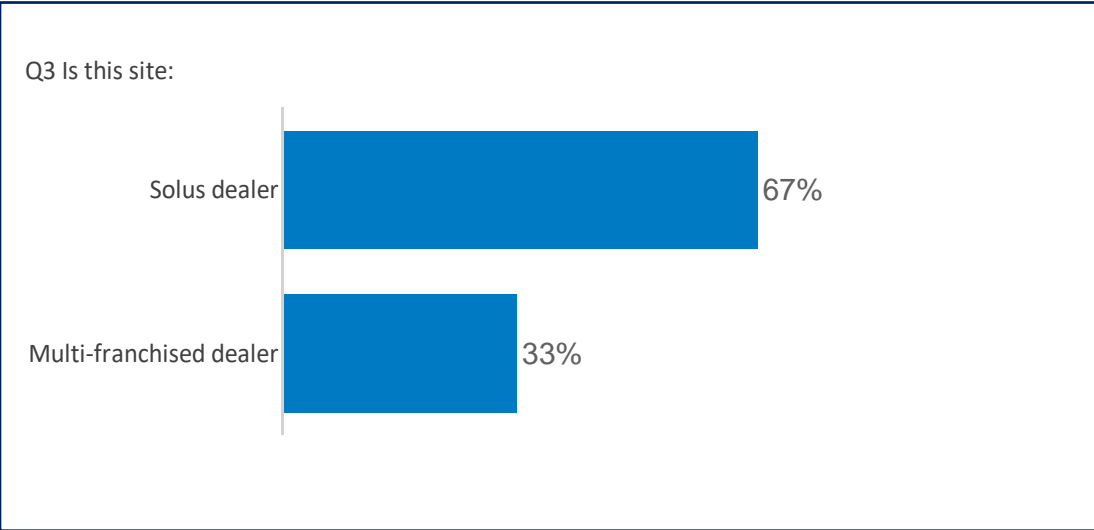
FRANCHISE	NUMBER OF RESPONDENTS	TOTAL NETWORK SIZE	RESPONSE RATE %
BMW	14	45	31
DUCATI	19	30	63
HARLEY DAVIDSON	15	29	52
HONDA	36	72	50
KAWASAKI	12	60	20
KTM	11	45	24
LEXMOTO	10	124	8
PIAGGIO GROUP	18	53	34
ROYAL ENFIELD	8	59	14
SUZUKI	17	87	20
TRIUMPH	22	48	46
YAMAHA	33	93	35
TOTAL	215	745	29

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2021 SURVEY



AUTUMN 2020 SURVEY RESULTS

INDEPENDENT	76%
PRIVATELY OWNED	22%
PLC GROUP	2%

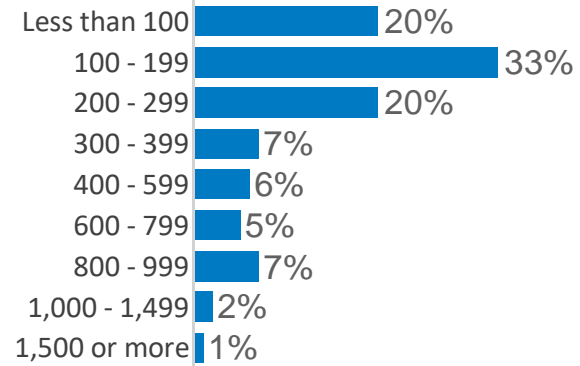


AUTUMN 2020 SURVEY RESULTS

SOLUS	60%
MULTI-FRANCHISED	40%

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2021 SURVEY

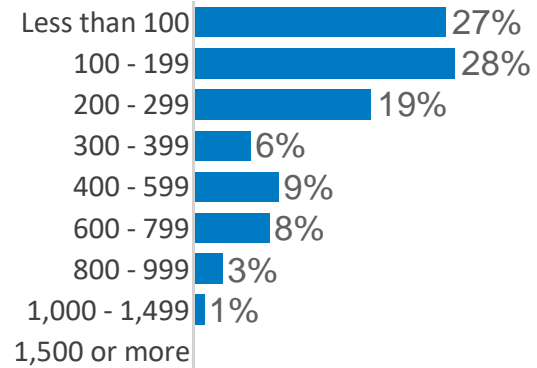
Q4 How many new motorcycles do you sell per annum?



AUTUMN 2020 SURVEY RESULTS

Less than 100	23%	400-599	4%
100-199	32%	600-799	4%
200-299	22%	800-999	4%
300-399	10%	1000-1499	0%
1500 or more	1%		

Q5 How many used motorcycles do you sell per annum?

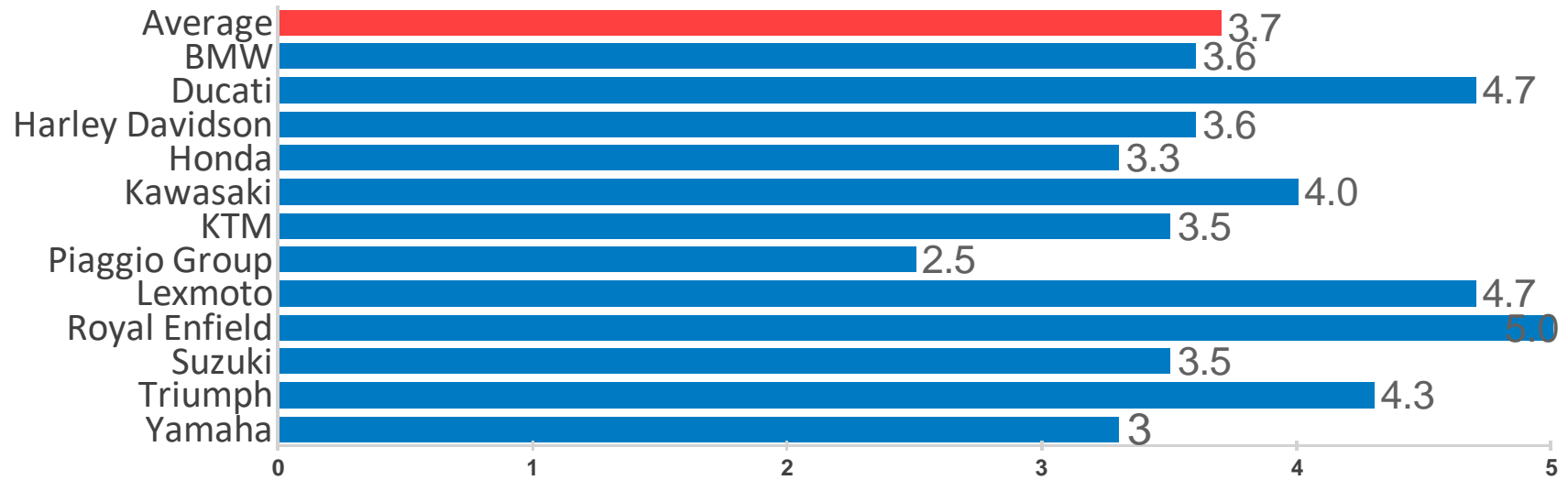


AUTUMN 2020 SURVEY RESULTS

Less than 100	26%	400-599	17%
100-199	30%	600-799	2%
200-299	17%	800-999	0%
300-399	7%	1000-1499	2%
1500 or more	0%		

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2021 SURVEY

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

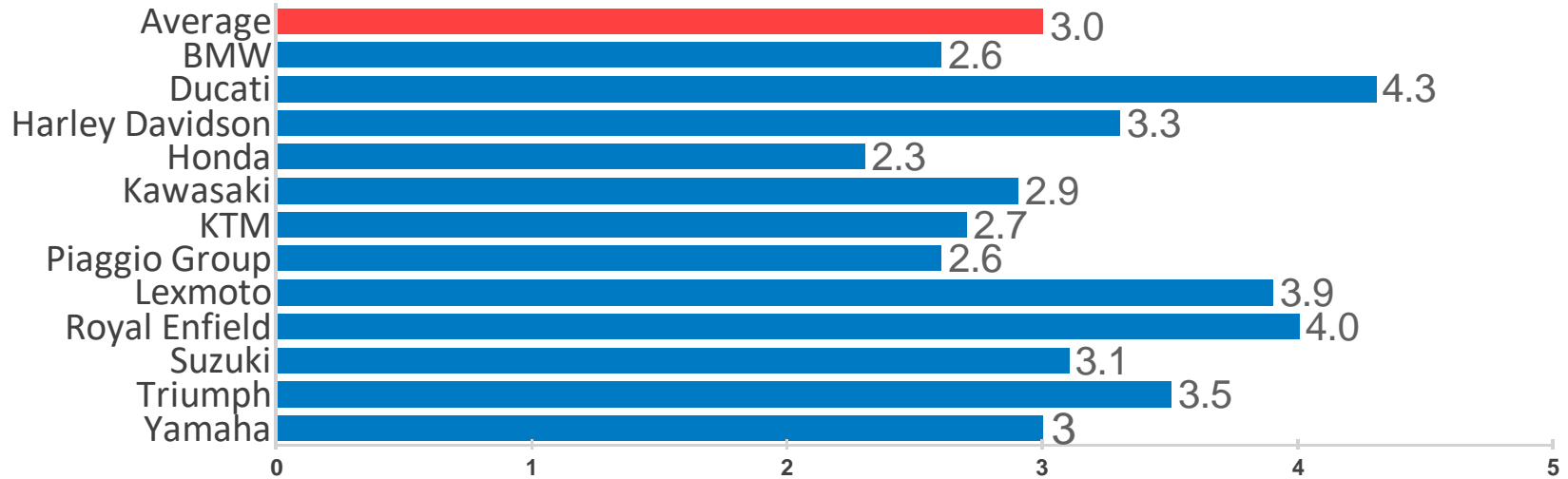


PREVIOUS SURVEY RESULTS – AUTUMN 2020

6a: The product's price and value against other brands			
BMW	3.5	Lexmoto	4.7
Ducati	3.9	Royal Enfield	2.0
Harley Davidson	3.6	Suzuki	3.3
Honda	3.3	Triumph	4.0
Kawasaki	4.0	Yamaha	3.1
KTM	3.8		
Piaggio Group	3.0	AVERAGE	3.5

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2021 SURVEY

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

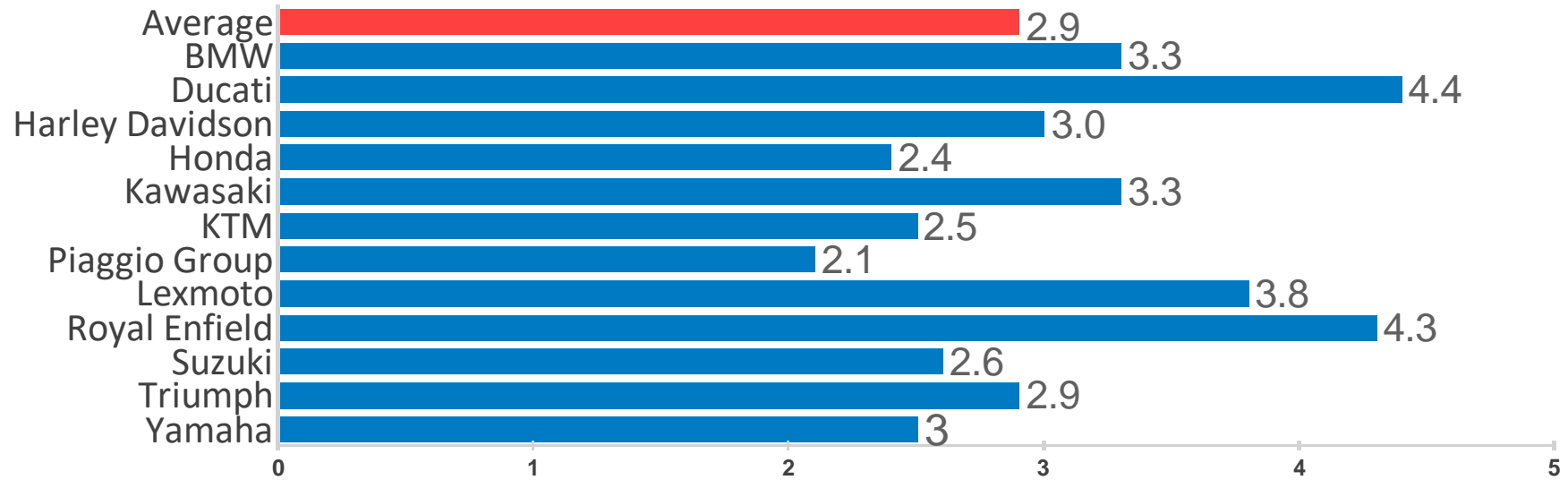


PREVIOUS SURVEY RESULTS – AUTUMN 2020

6b: How realistic is your target and performance related bonus in terms of achievement			
BMW	2.5	Lexmoto	4.0
Ducati	4.0	Royal Enfield	4.0
Harley Davidson	3.4	Suzuki	3.3
Honda	2.7	Triumph	3.9
Kawasaki	3.1	Yamaha	2.6
KTM	3.1		
Piaggio Group	2.6	AVERAGE	3.1

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2021 SURVEY

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



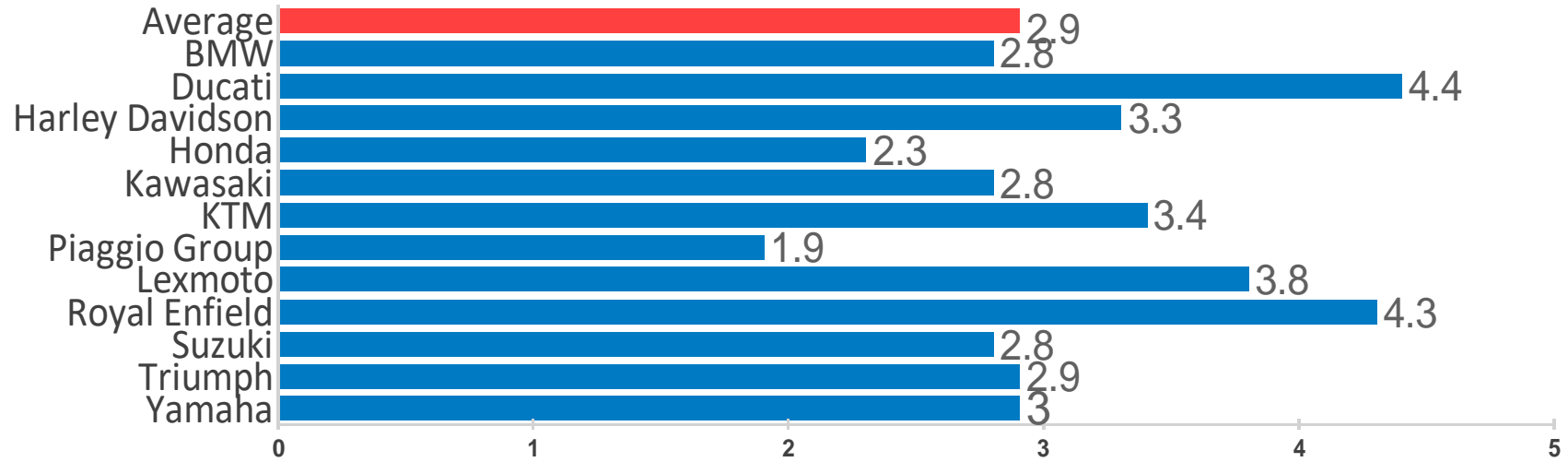
PREVIOUS SURVEY RESULTS – AUTUMN 2020

7a: The fairness of your manufacturer's policy for the supply and stocking of motorcycles

BMW	3.5	Lexmoto	4.0
Ducati	4.0	Royal Enfield	4.6
Harley Davidson	2.4	Suzuki	2.8
Honda	2.4	Triumph	3.2
Kawasaki	3.2	Yamaha	2.2
KTM	3.2		
Piaggio Group	2.6	AVERAGE	2.9

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2021 SURVEY

Q7 c) How realistic is your target negotiations and performance related bonus in terms of achievement



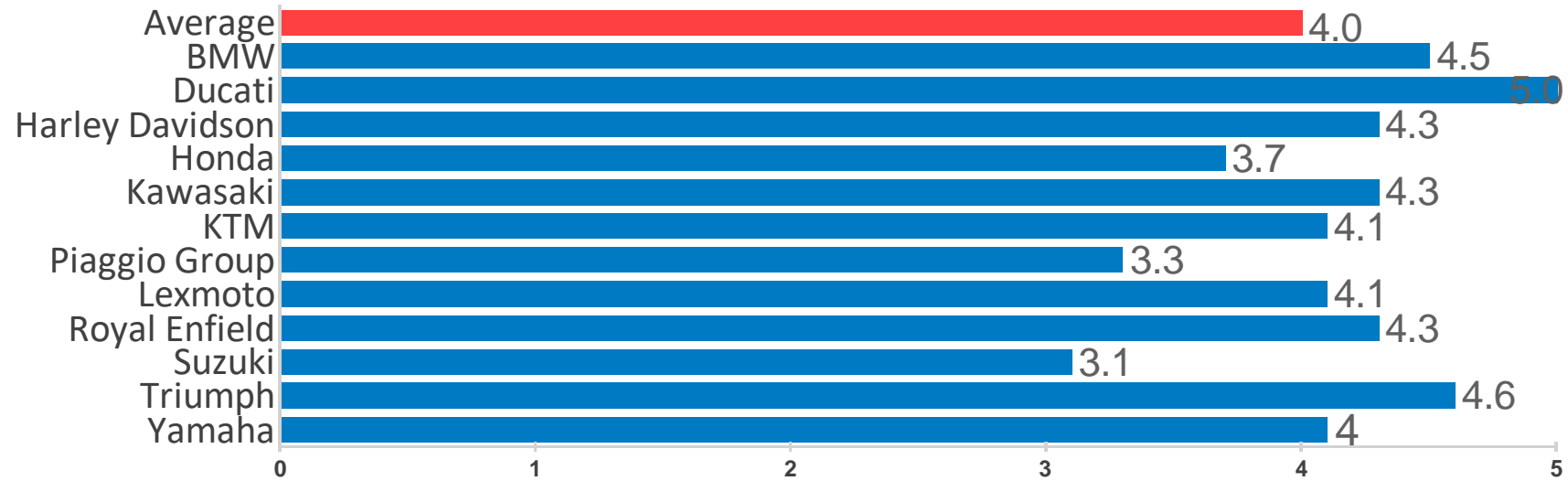
PREVIOUS SURVEY RESULTS – AUTUMN 2020

7c: Your target negotiations and performance related bonus in terms of achievement

BMW	2.3	Lexmoto	3.9
Ducati	3.9	Royal Enfield	3.9
Harley Davidson	3.1	Suzuki	3.0
Honda	2.4	Triumph	3.2
Kawasaki	3.0	Yamaha	2.4
KTM	3.0		
Piaggio Group	2.6	AVERAGE	2.9

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2021 SURVEY

Q8 a) The brand image

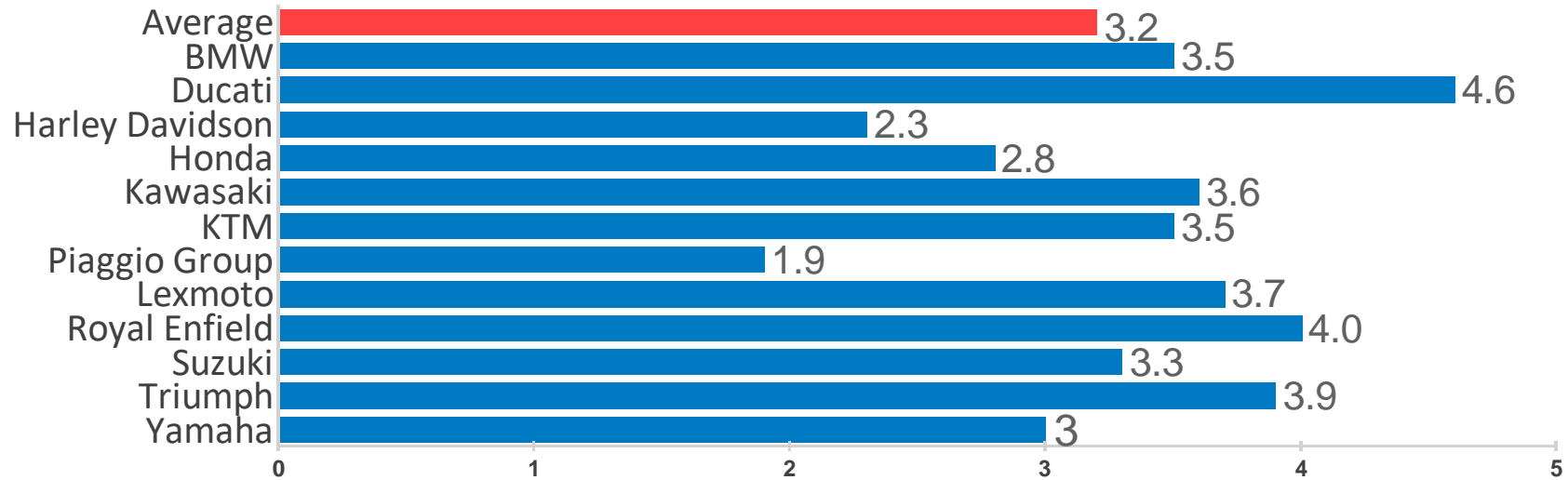


PREVIOUS SURVEY RESULTS – AUTUMN 2020

8a: The brand image			
BMW	4.0	Lexmoto	3.9
Ducati	5.0	Royal Enfield	5.0
Harley Davidson	3.6	Suzuki	3.1
Honda	3.9	Triumph	4.9
Kawasaki	4.6	Yamaha	3.9
KTM	4.2		
Piaggio Group	3.1	AVERAGE	4.0

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2021 SURVEY

Q8 c) Retail sales incentives and promotions

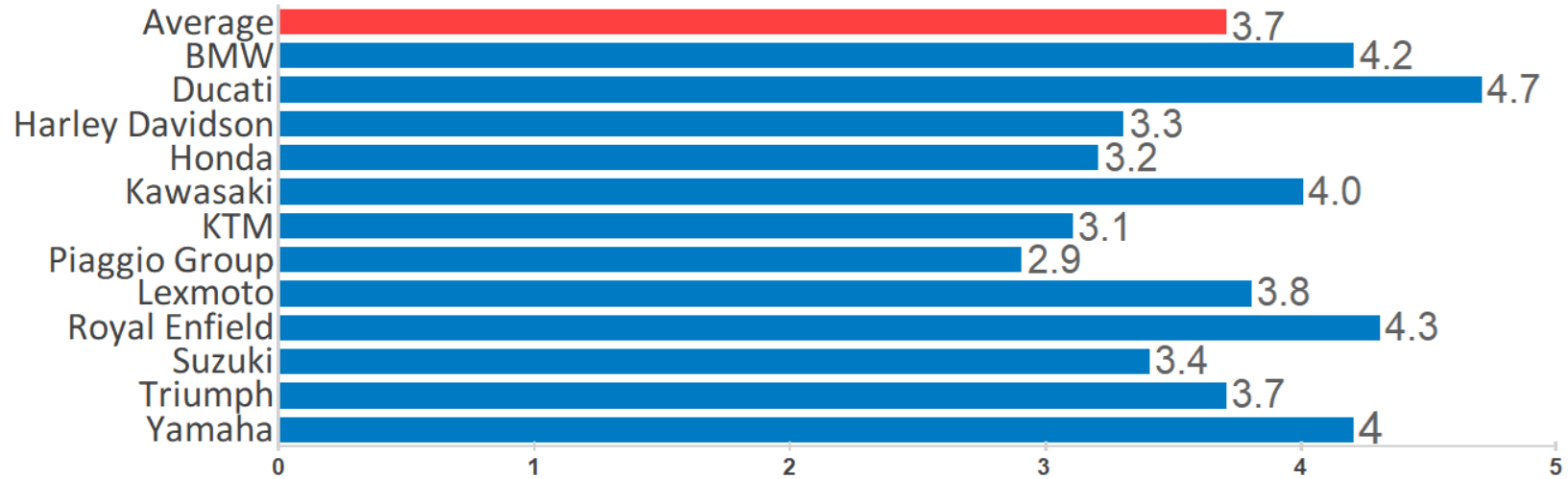


PREVIOUS SURVEY RESULTS – AUTUMN 2020

8c: Frequency of introduction of new models			
BMW	4.2	Lexmoto	3.6
Ducati	4.9	Royal Enfield	4.6
Harley Davidson	2.7	Suzuki	1.5
Honda	3.6	Triumph	4.6
Kawasaki	4.2	Yamaha	3.1
KTM	4.0		
Piaggio Group	2.5	AVERAGE	3.4

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2021 SURVEY

Q9) How satisfied are you with your manufacturers warranty policy

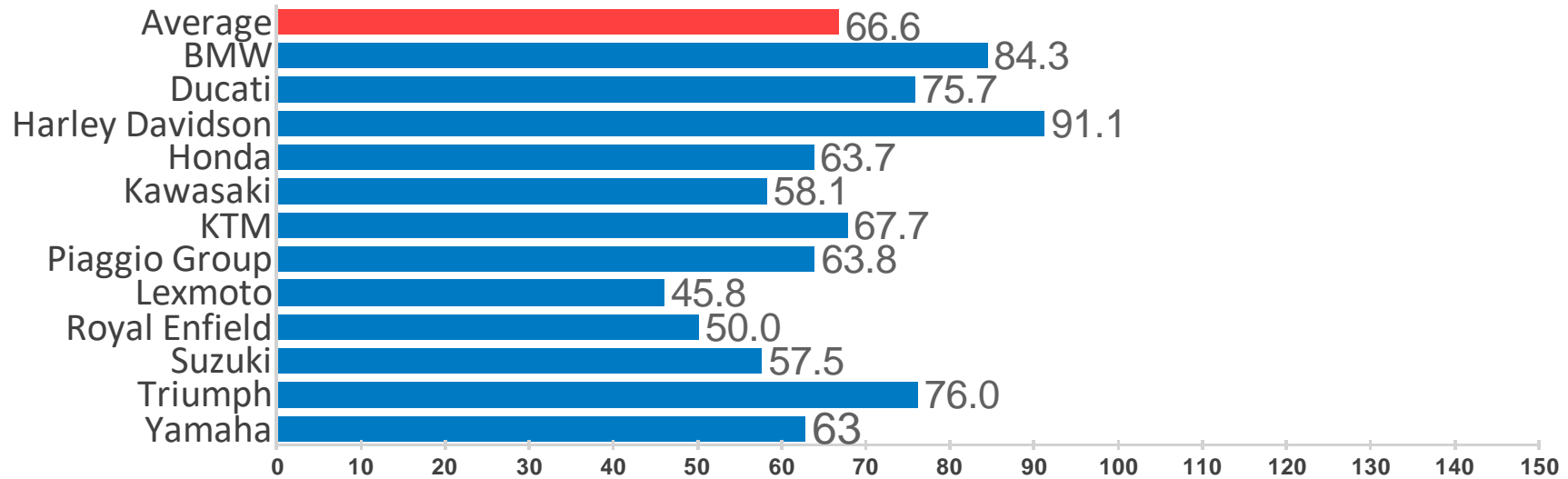


PREVIOUS SURVEY RESULTS – AUTUMN 2020

9: Satisfaction with your manufacturer's warranty policy			
BMW	3.6	Lexmoto	3.9
Ducati	2.1	Royal Enfield	2.9
Harley Davidson	2.5	Suzuki	3.8
Honda	3.5	Triumph	4.1
Kawasaki	4.4	Yamaha	4.0
KTM	3.4		
Piaggio Group	3.4	AVERAGE	3.6

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2021 SURVEY

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

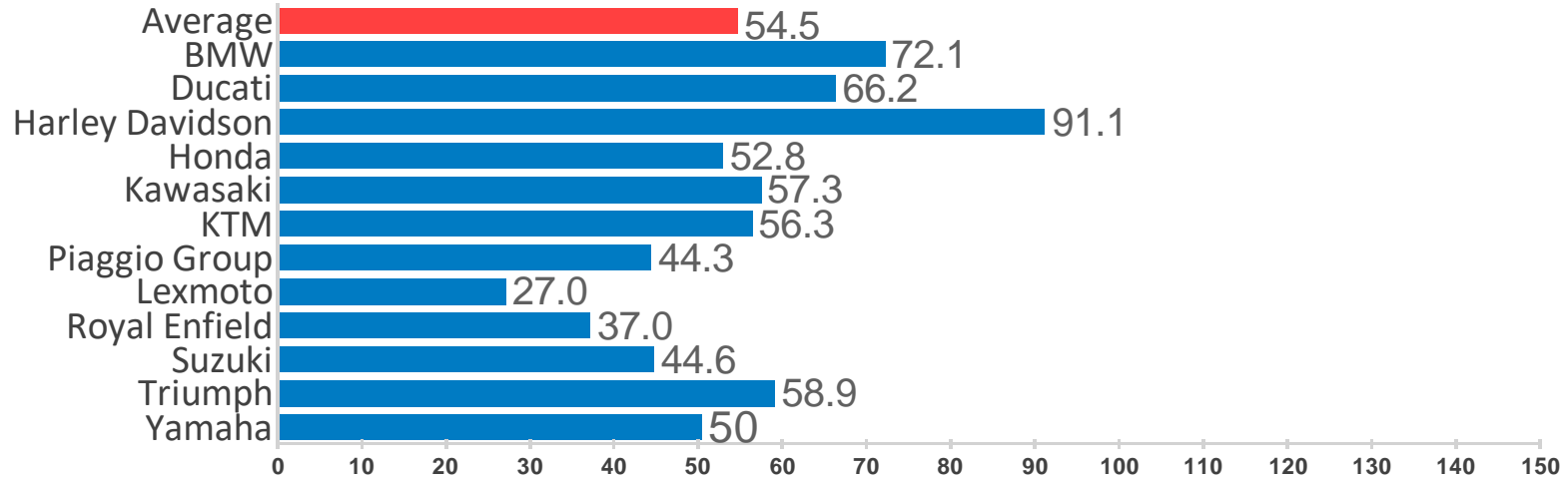


PREVIOUS SURVEY RESULTS – AUTUMN 2020

10: What is your labour rate for retail (£)			
BMW	87.5	Lexmoto	37.9
Ducati	67.3	Royal Enfield	48.0
Harley Davidson	81.6	Suzuki	61.5
Honda	66.0	Triumph	68.0
Kawasaki	61.6	Yamaha	66.3
KTM	67.7		
Piaggio Group	68.0	AVERAGE	66.2

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2021 SURVEY

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

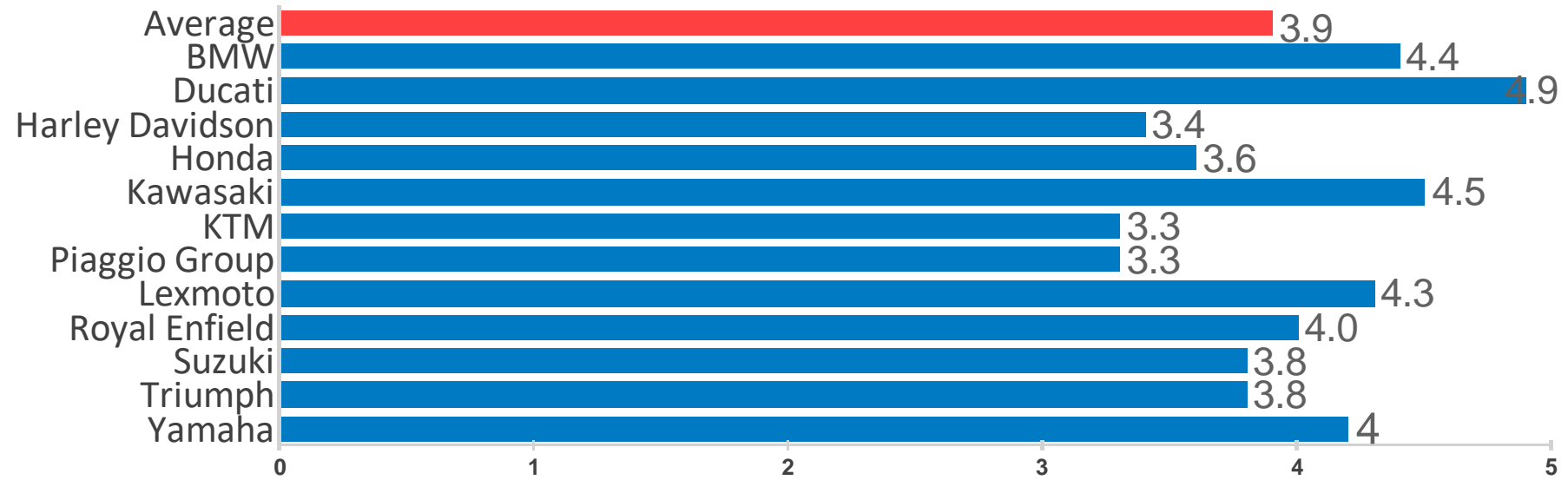


PREVIOUS SURVEY RESULTS – AUTUMN 2020

11. What is your labour rate for warranty before VAT (£)			
BMW	67.3	Lexmoto	23.6
Ducati	53.7	Royal Enfield	42.6
Harley Davidson	81.6	Suzuki	45.0
Honda	52.9	Triumph	58.6
Kawasaki	54.6	Yamaha	51.2
KTM	53.3		
Piaggio Group	51.5	AVERAGE	53.8

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2021 SURVEY

Q12 a) Timely and fair settlement of warranty claims

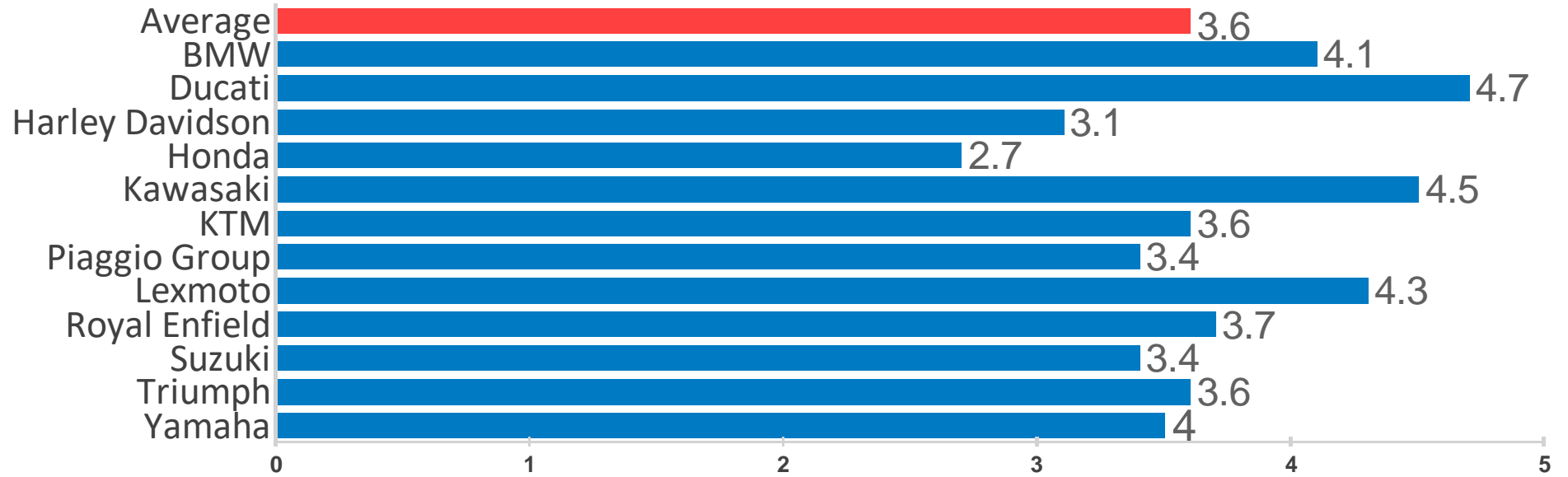


PREVIOUS SURVEY RESULTS – AUTUMN 2020

12d: Timely and fair settlement of warranty claims			
BMW	4.1	Lexmoto	3.9
Ducati	3.8	Royal Enfield	4.0
Harley Davidson	3.1	Suzuki	3.9
Honda	3.6	Triumph	4.4
Kawasaki	4.3	Yamaha	3.5
KTM	3.3		
Piaggio Group	2.9	AVERAGE	3.7

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2021 SURVEY

Q12 b) Availability of technical support

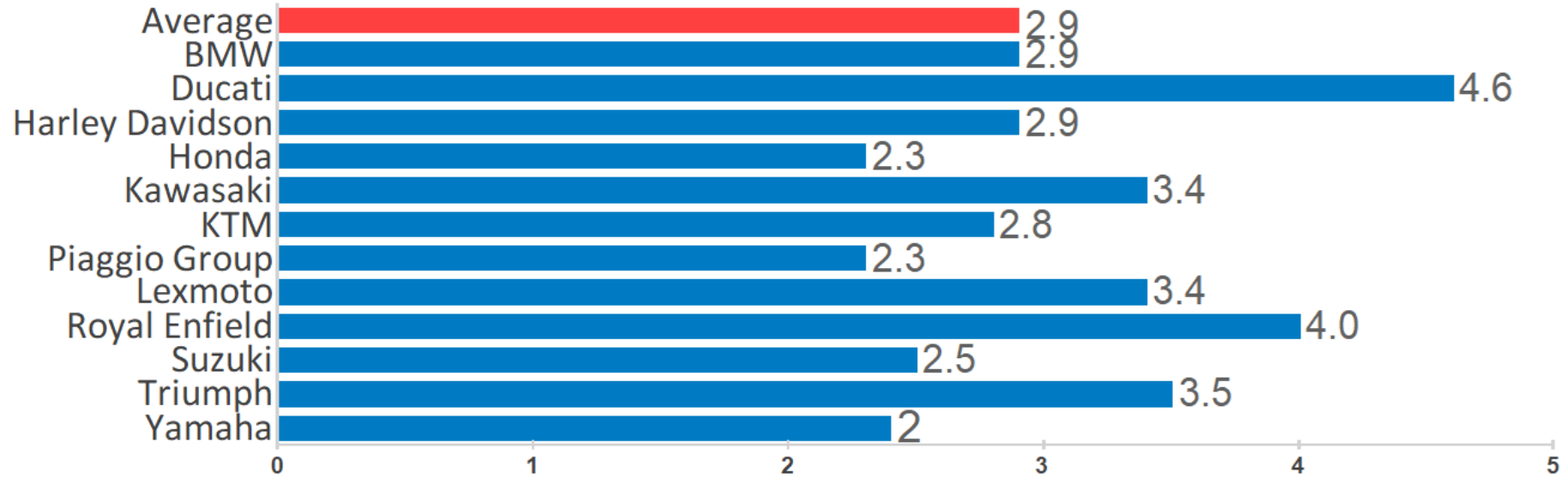


PREVIOUS SURVEY RESULTS – AUTUMN 2020

12b: The availability of technical support			
BMW	3.5	Lexmoto	3.7
Ducati	2.8	Royal Enfield	4.0
Harley Davidson	2.6	Suzuki	3.8
Honda	3.2	Triumph	3.9
Kawasaki	4.3	Yamaha	3.3
KTM	4.0		
Piaggio Group	3.5	AVERAGE	3.5

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2021 SURVEY

Q13) How satisfied are you with the profit return of your franchise

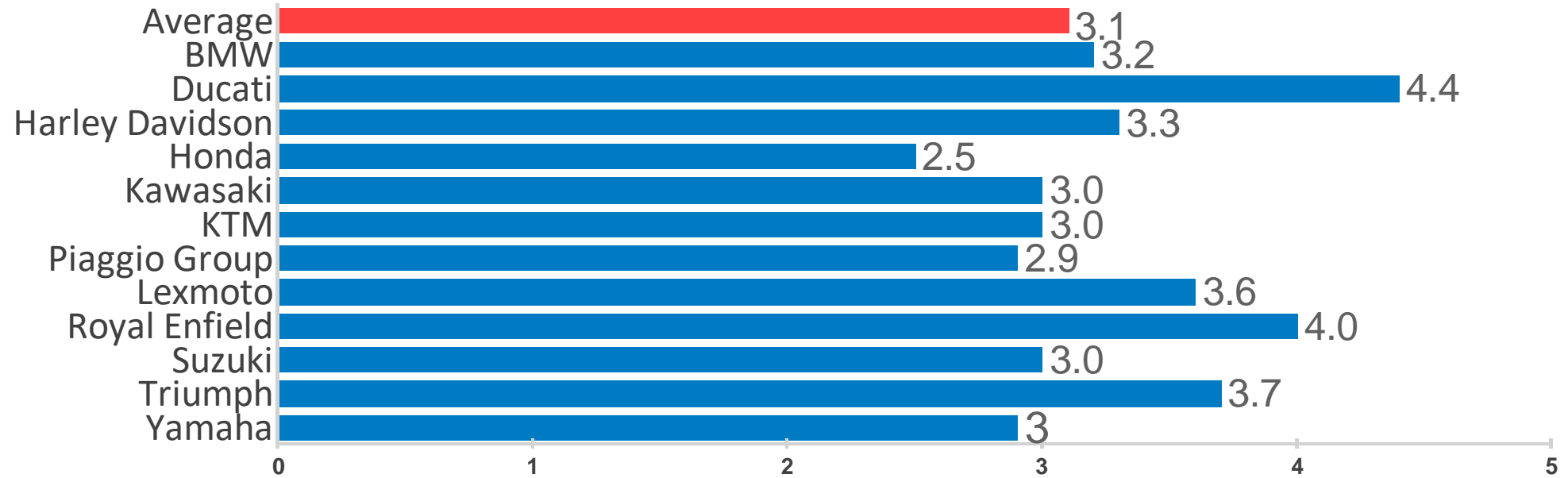


PREVIOUS SURVEY RESULTS – AUTUMN 2020

13: The profit return by representing your franchise			
BMW	2.7	Lexmoto	3.3
Ducati	3.8	Royal Enfield	3.1
Harley Davidson	3.2	Suzuki	2.7
Honda	2.4	Triumph	4.2
Kawasaki	3.3	Yamaha	2.3
KTM	3.0		
Piaggio Group	2.4	AVERAGE	2.9

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2021 SURVEY

Q14 a) The future profitability of your business

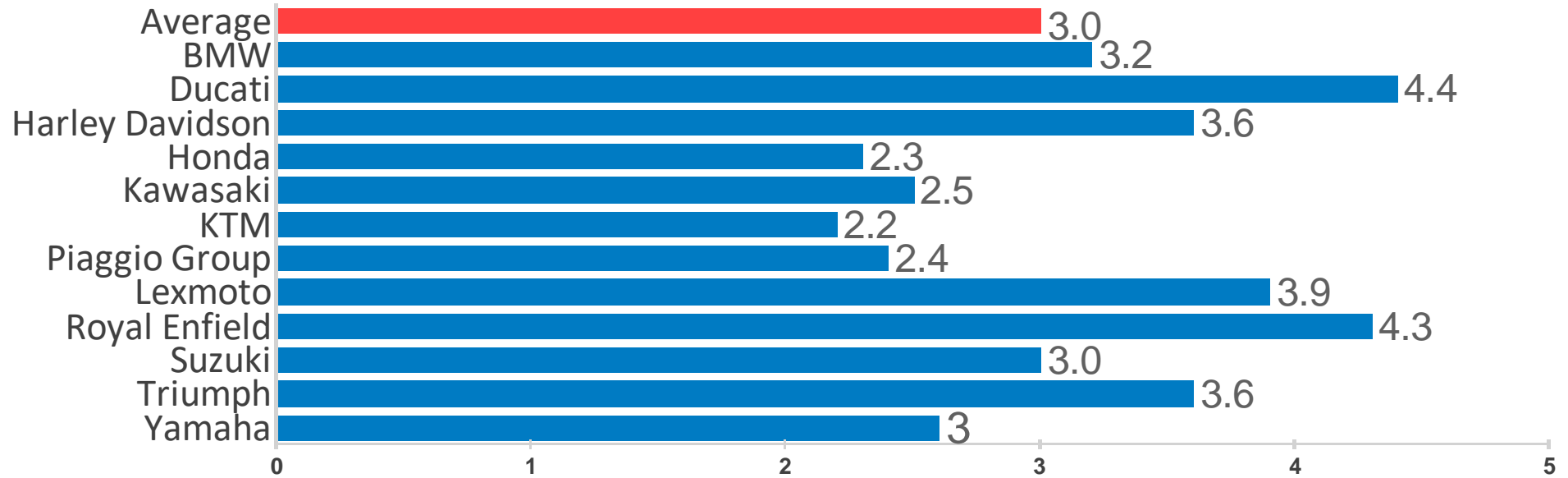


PREVIOUS SURVEY RESULTS – AUTUMN 2020

14a: The future profitability of your business			
BMW	2.5	Lexmoto	3.7
Ducati	3.9	Royal Enfield	4.0
Harley Davidson	2.8	Suzuki	2.7
Honda	2.6	Triumph	3.8
Kawasaki	3.2	Yamaha	2.5
KTM	3.4		
Piaggio Group	2.9	AVERAGE	3.0

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2021 SURVEY

Q15 a) The dealer standards expected by your manufacturer

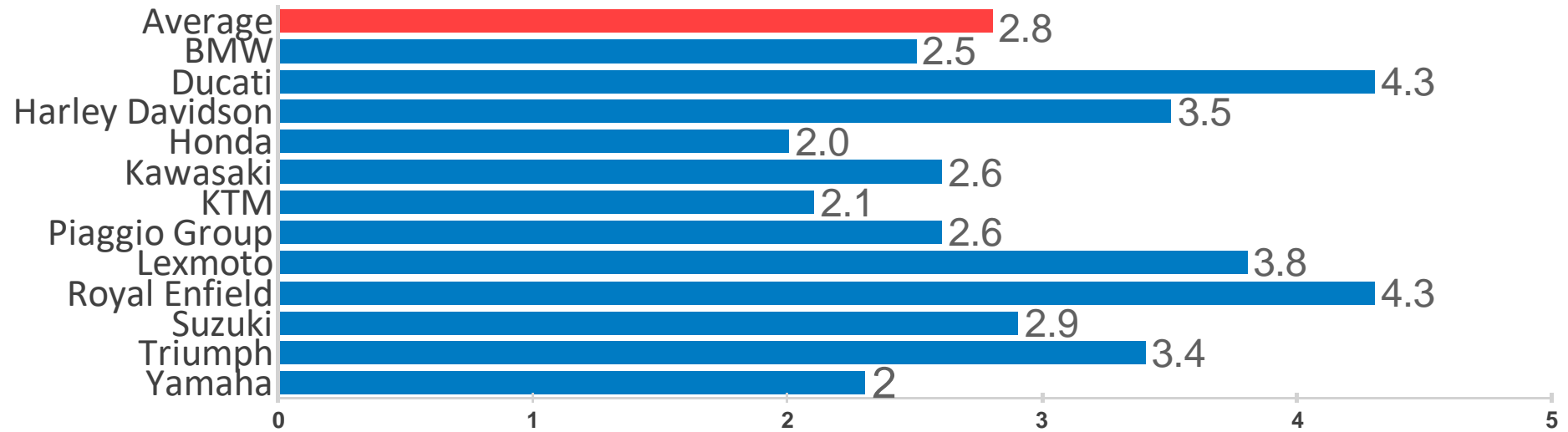


PREVIOUS SURVEY RESULTS – AUTUMN 2020

15a: The dealer standards expected by your manufacturer			
BMW	2.7	Lexmoto	4.0
Ducati	3.8	Royal Enfield	4.0
Harley Davidson	3.6	Suzuki	3.4
Honda	2.3	Triumph	3.6
Kawasaki	2.9	Yamaha	2.3
KTM	3.7		
Piaggio Group	3.0	AVERAGE	3.0

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2021 SURVEY

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

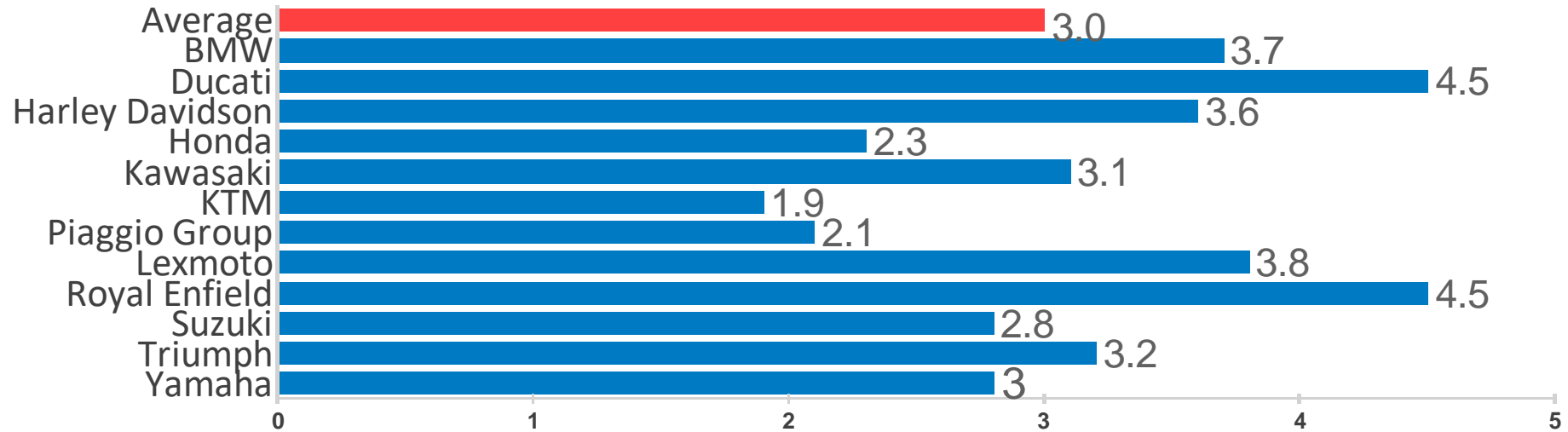


PREVIOUS SURVEY RESULTS – AUTUMN 2020

15b: How realistic do you feel your manufacturer's standards are compared with the return on investment/reward			
BMW	2.3	Lexmoto	3.7
Ducati	3.9	Royal Enfield	4.0
Harley Davidson	3.5	Suzuki	2.8
Honda	2.1	Triumph	3.6
Kawasaki	2.7	Yamaha	1.7
KTM	3.3		
Piaggio Group	2.5	AVERAGE	2.7

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2021 SURVEY

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

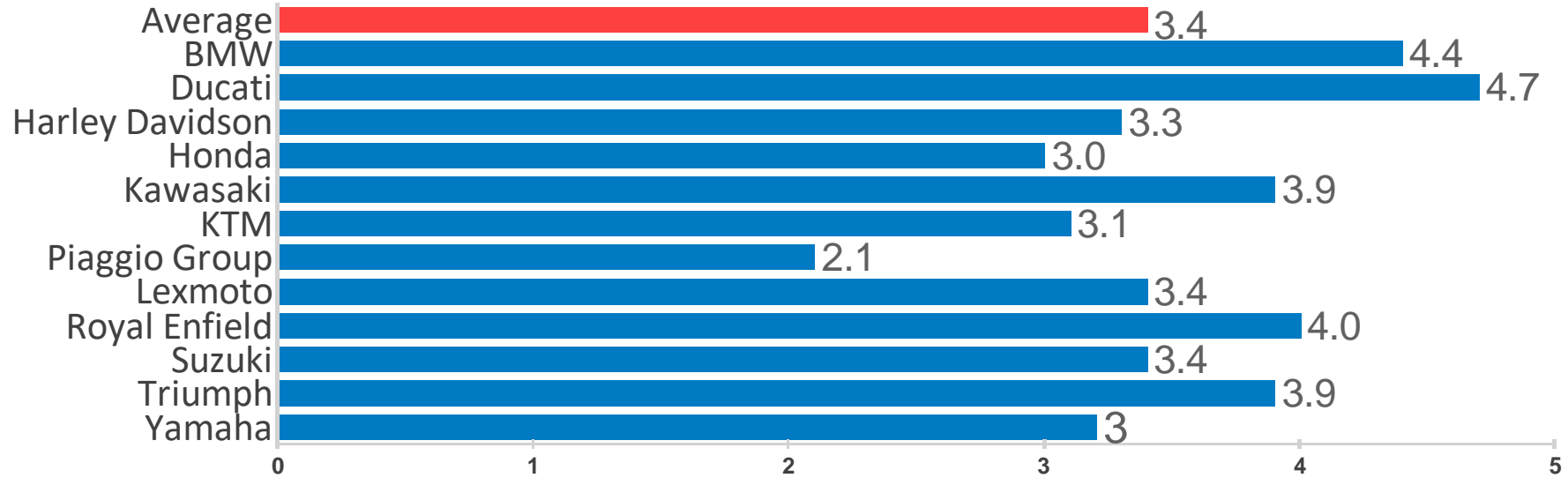


PREVIOUS SURVEY RESULTS – AUTUMN 2020

16a: That the management of your manufacturer takes dealers' views and opinions into account			
BMW	3.5	Lexmoto	3.7
Ducati	3.4	Royal Enfield	4.0
Harley Davidson	2.9	Suzuki	3.2
Honda	2.3	Triumph	3.5
Kawasaki	3.4	Yamaha	2.2
KTM	2.3		
Piaggio Group	2.1	AVERAGE	2.9

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2021 SURVEY

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

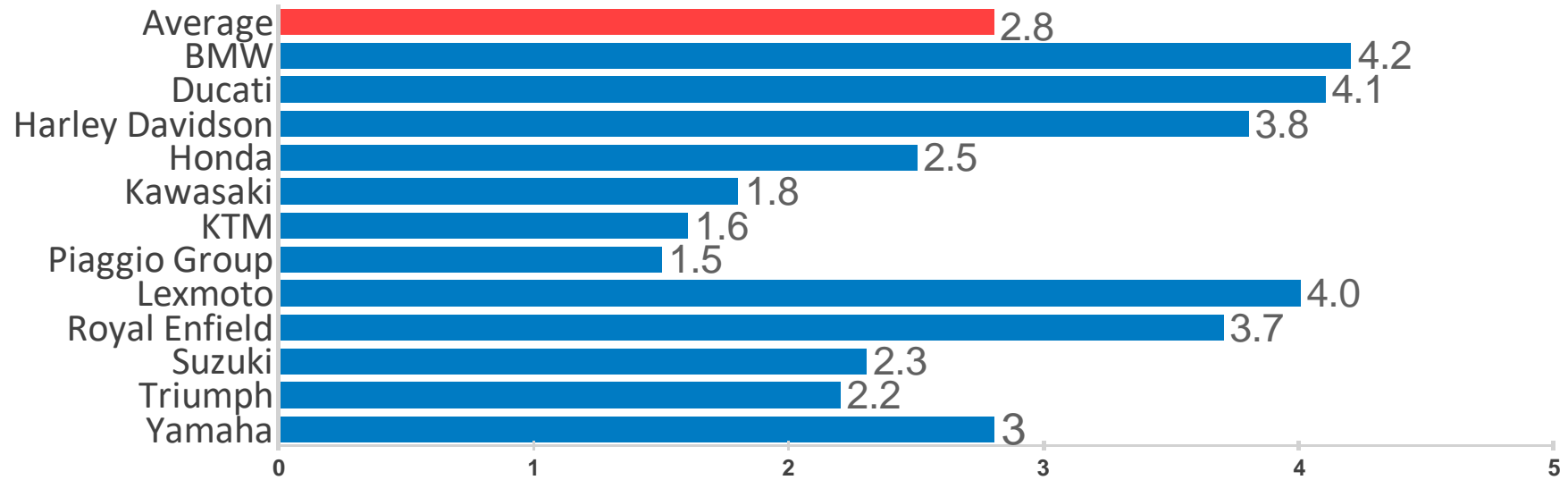


PREVIOUS SURVEY RESULTS – AUTUMN 2020

16d: The effectiveness of your manufacturer's retail finance programme			
BMW	3.7	Lexmoto	3.0
Ducati	3.9	Royal Enfield	4.6
Harley Davidson	3.1	Suzuki	3.5
Honda	3.1	Triumph	3.6
Kawasaki	3.9	Yamaha	3.0
KTM	3.2		
Piaggio Group	2.5	AVERAGE	3.3

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2021 SURVEY

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

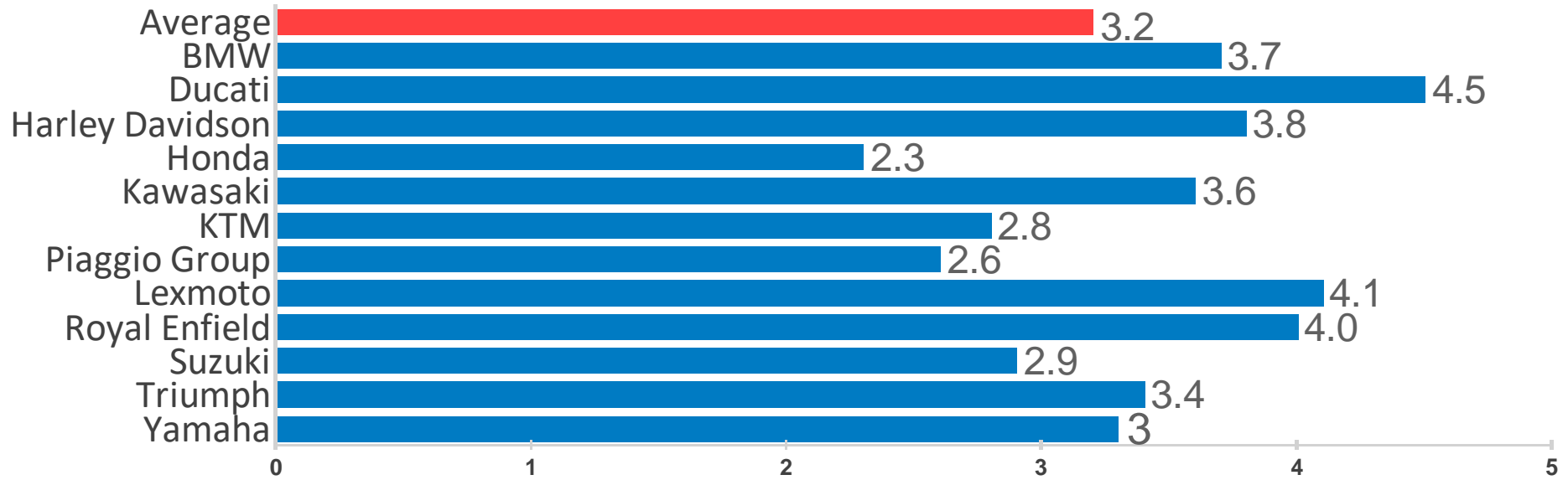


PREVIOUS SURVEY RESULTS – AUTUMN 2020

16e: The effectiveness of your dealer council and dealer forums			
BMW	3.7	Lexmoto	3.0
Ducati	4.4	Royal Enfield	4.7
Harley Davidson	3.2	Suzuki	2.5
Honda	2.5	Triumph	2.7
Kawasaki	2.5	Yamaha	2.1
KTM	1.2		
Piaggio Group	2.3	AVERAGE	2.7

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2021 SURVEY

Q17 a) The routine procedures and controls expected

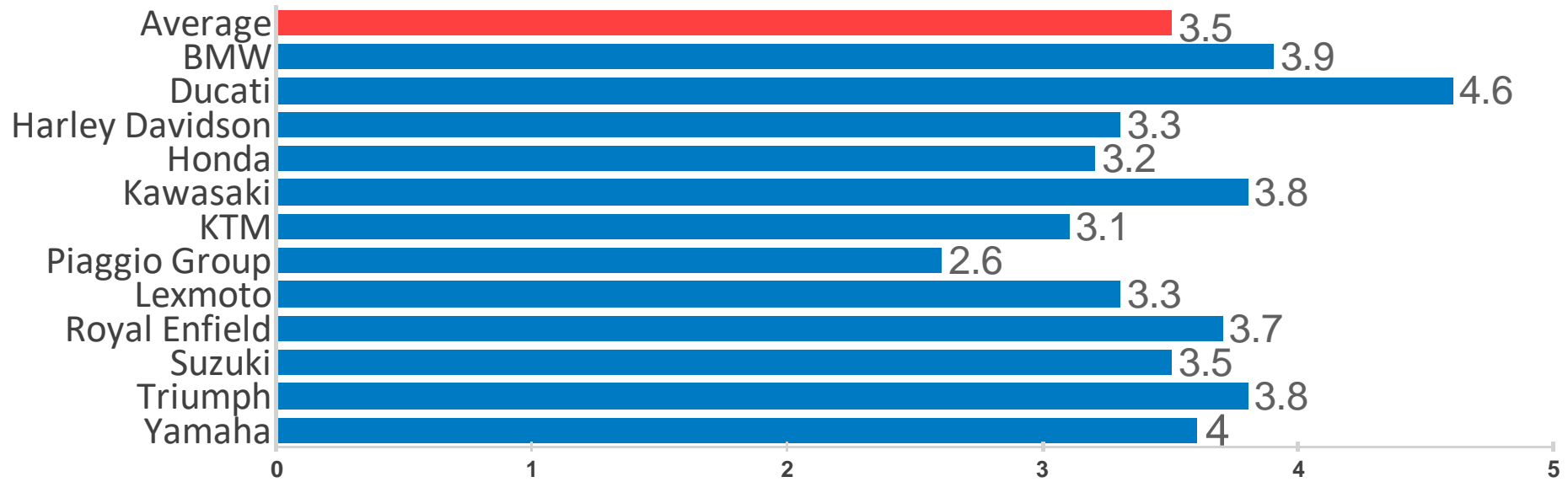


PREVIOUS SURVEY RESULTS – AUTUMN 2020

17a: The routine procedures and controls expected			
BMW	3.8	Lexmoto	3.7
Ducati	3.9	Royal Enfield	4.6
Harley Davidson	3.2	Suzuki	3.3
Honda	2.3	Triumph	3.8
Kawasaki	3.1	Yamaha	2.7
KTM	3.1		
Piaggio Group	2.8	AVERAGE	3.1

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2021 SURVEY

Q17 b) The quality of your manufacturer's training

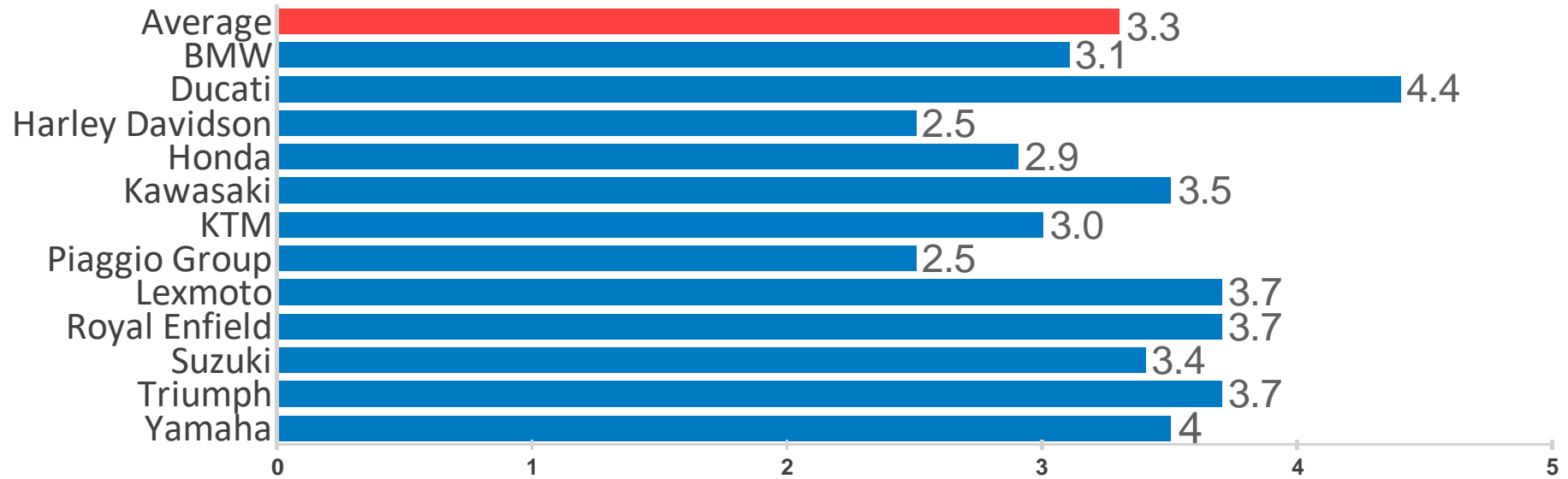


PREVIOUS SURVEY RESULTS – AUTUMN 2020

17b: The quality of your manufacturer's training			
BMW	3.7	Lexmoto	2.7
Ducati	3.7	Royal Enfield	4.8
Harley Davidson	3.2	Suzuki	3.4
Honda	3.2	Triumph	3.6
Kawasaki	4.2	Yamaha	3.1
KTM	3.3		
Piaggio Group	3.0	AVERAGE	3.4

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2021 SURVEY

Q17 c) The cost of your manufacturer's training

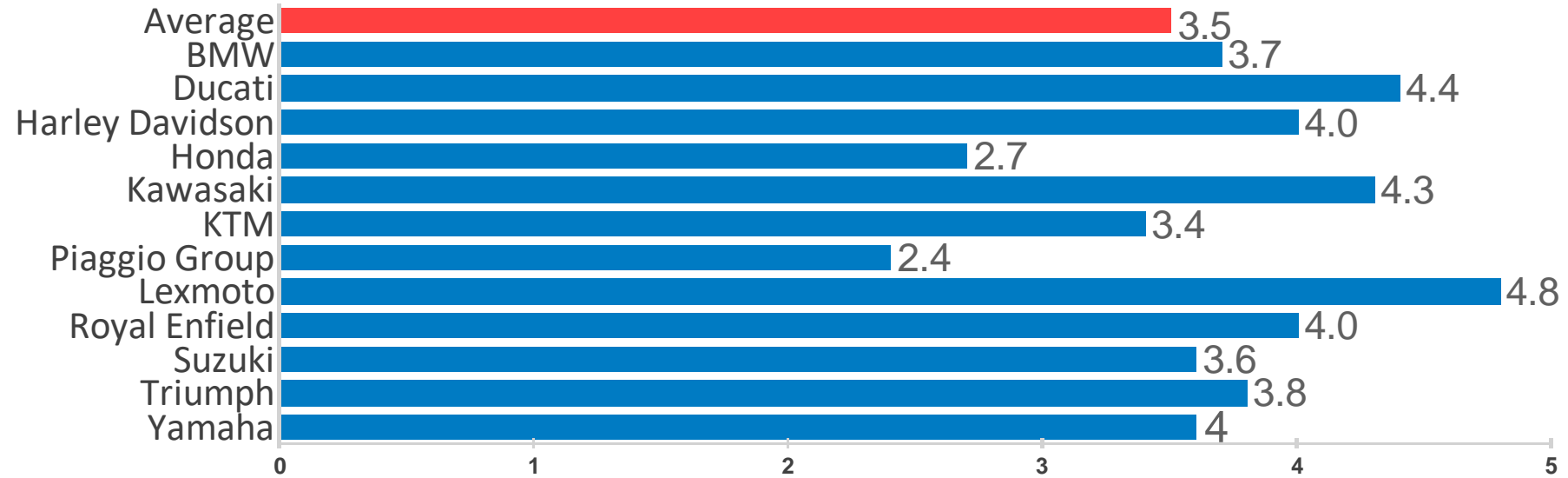


PREVIOUS SURVEY RESULTS – AUTUMN 2020

17c: The cost of your manufacturer's training			
BMW	2.5	Lexmoto	3.0
Ducati	3.4	Royal Enfield	4.9
Harley Davidson	2.9	Suzuki	3.6
Honda	3.0	Triumph	4.1
Kawasaki	3.4	Yamaha	2.9
KTM	3.3		
Piaggio Group	2.9	AVERAGE	3.3

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2021 SURVEY

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

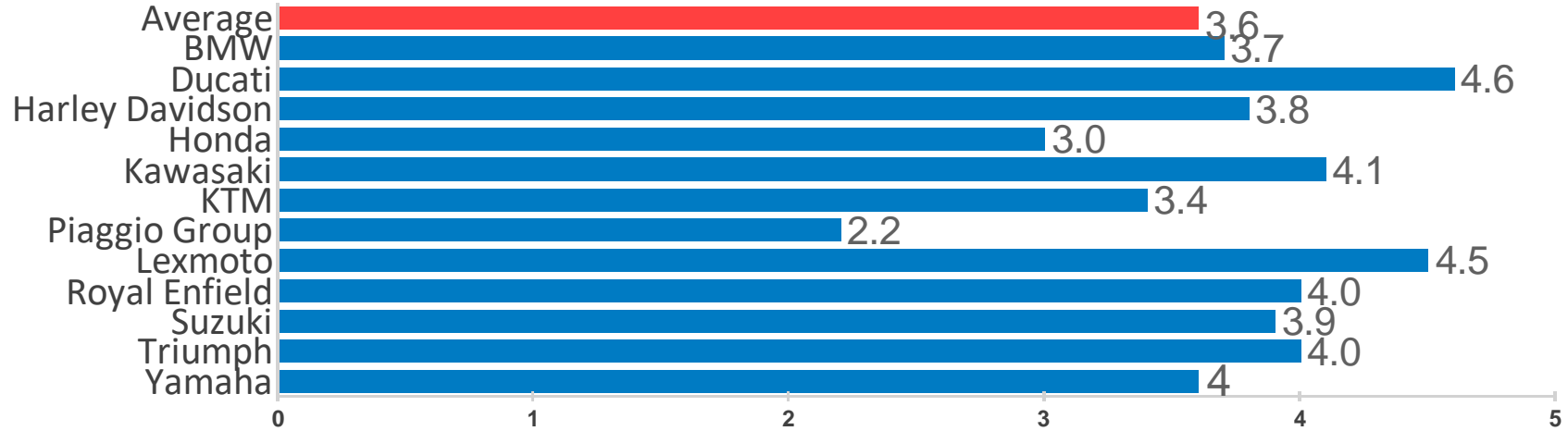


PREVIOUS SURVEY RESULTS – AUTUMN 2020

17d: Your ability to do business with your manufacturer on a day-to-day basis			
BMW	3.8	Lexmoto	4.1
Ducati	3.8	Royal Enfield	4.8
Harley Davidson	3.5	Suzuki	3.6
Honda	2.8	Triumph	4.1
Kawasaki	3.9	Yamaha	2.9
KTM	3.3		
Piaggio Group	2.5	AVERAGE	3.4

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2021 SURVEY

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

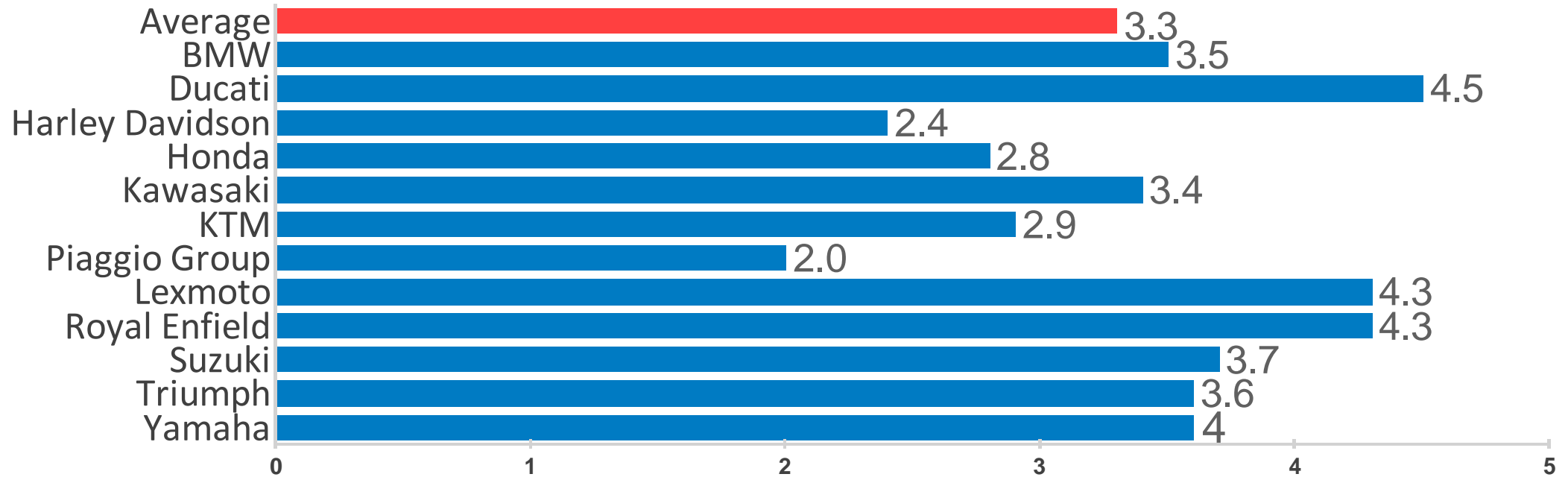


PREVIOUS SURVEY RESULTS – AUTUMN 2020

17e: The support and assistance provided by your manufacturer to enable you to follow a professional sales process			
BMW	3.2	Lexmoto	4.0
Ducati	3.8	Royal Enfield	4.9
Harley Davidson	3.5	Suzuki	3.6
Honda	3.0	Triumph	4.0
Kawasaki	3.8	Yamaha	2.7
KTM	3.4		
Piaggio Group	2.5	AVERAGE	3.3

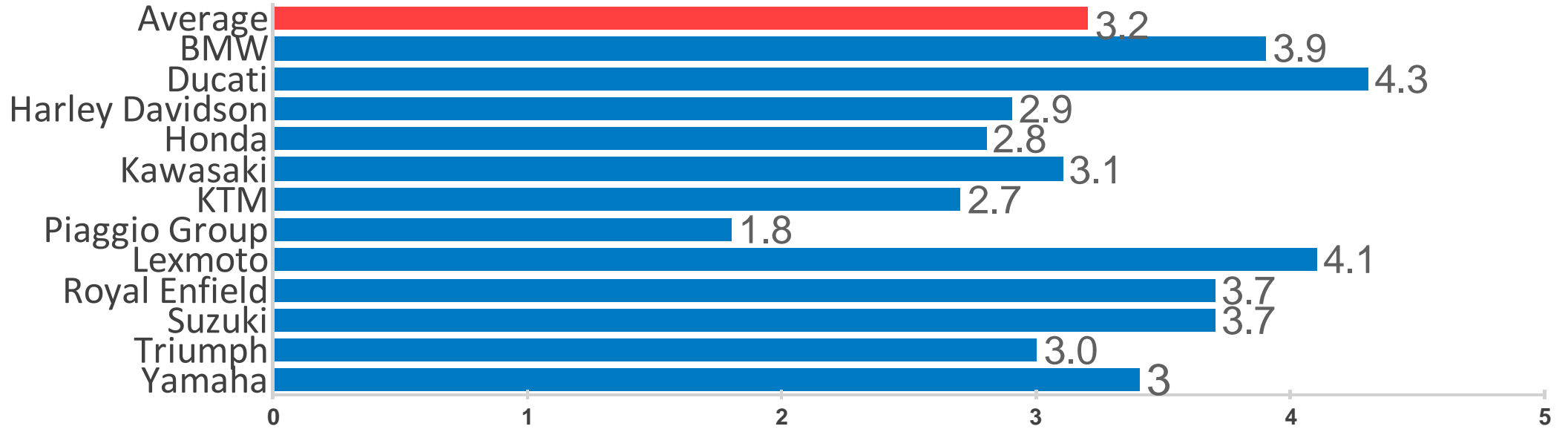
NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2021 SURVEY

Q17 f) The level of your manufacturers support throughout the Covid-19 crisis



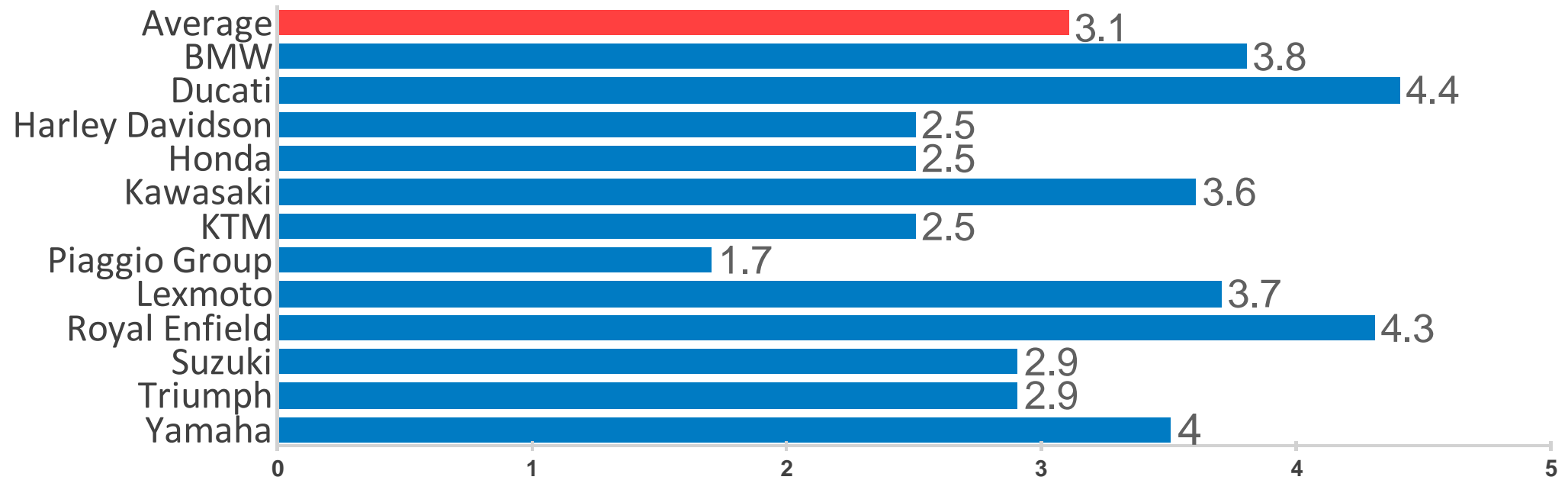
NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2021 SURVEY

Q17 g) The quality of guidance provided by your manufacturer to your dealership during the Covid-19 crisis



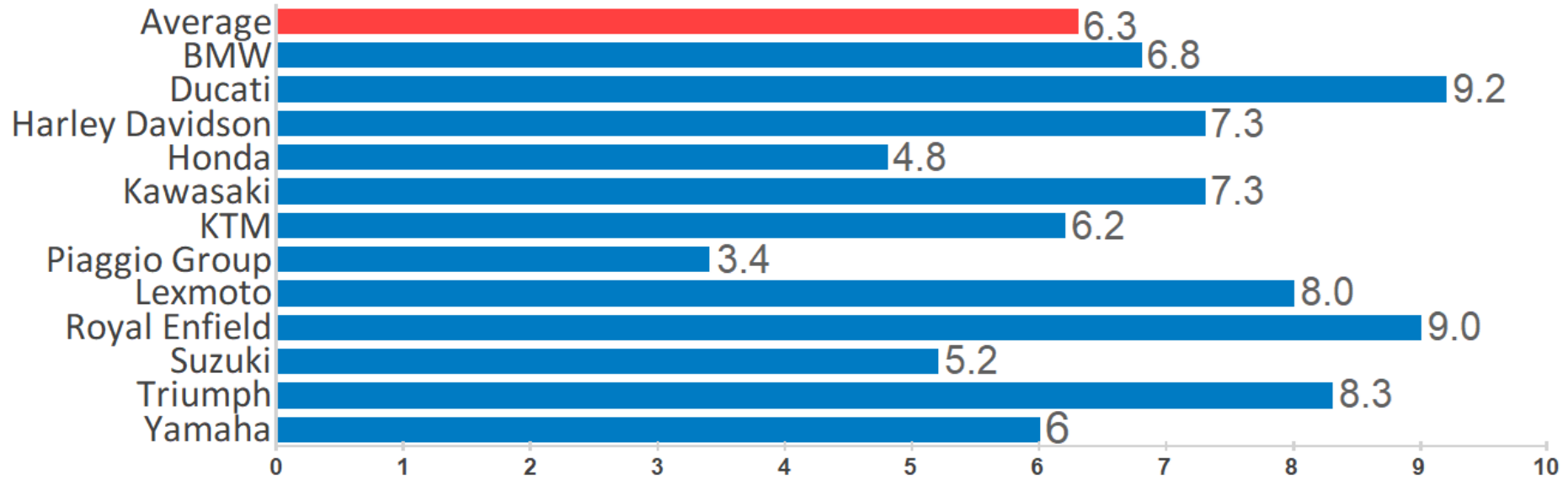
NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2021 SURVEY

Q17 h) The financial support available to your dealership from your manufacturer



NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2021 SURVEY

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



PREVIOUS SURVEY RESULTS – AUTUMN 2020

18: Overall, how do you rate the value of holding your motorcycle franchise			
BMW	7.5	Lexmoto	8.0
Ducati	8.2	Royal Enfield	9.5
Harley Davidson	6.5	Suzuki	5.7
Honda	5.3	Triumph	8.9
Kawasaki	7.7	Yamaha	4.9
KTM	7.1		
Piaggio Group	4.3	AVERAGE	6.4



NMDA

NATIONAL MOTORCYCLE DEALERS ASSOCIATION

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