

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY



NATIONAL MOTORCYCLE DEALERS ASSOCIATION

DEALER ATTITUDE SURVEY RESULTS

AUTUMN 2018

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NATIONAL MOTORCYCLE DEALERS ASSOCIATION

DEALER ATTITUDE SURVEY AUTUMN 2018

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

NB: BMW and Ducati are not included in this survey as they did not meet the 15% minimum response rate criteria

National Motorcycle Dealers Association

November 2018

Tel: Stephen Latham: 07515 975157 Email: stephenlatham@rmif.co.uk

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY



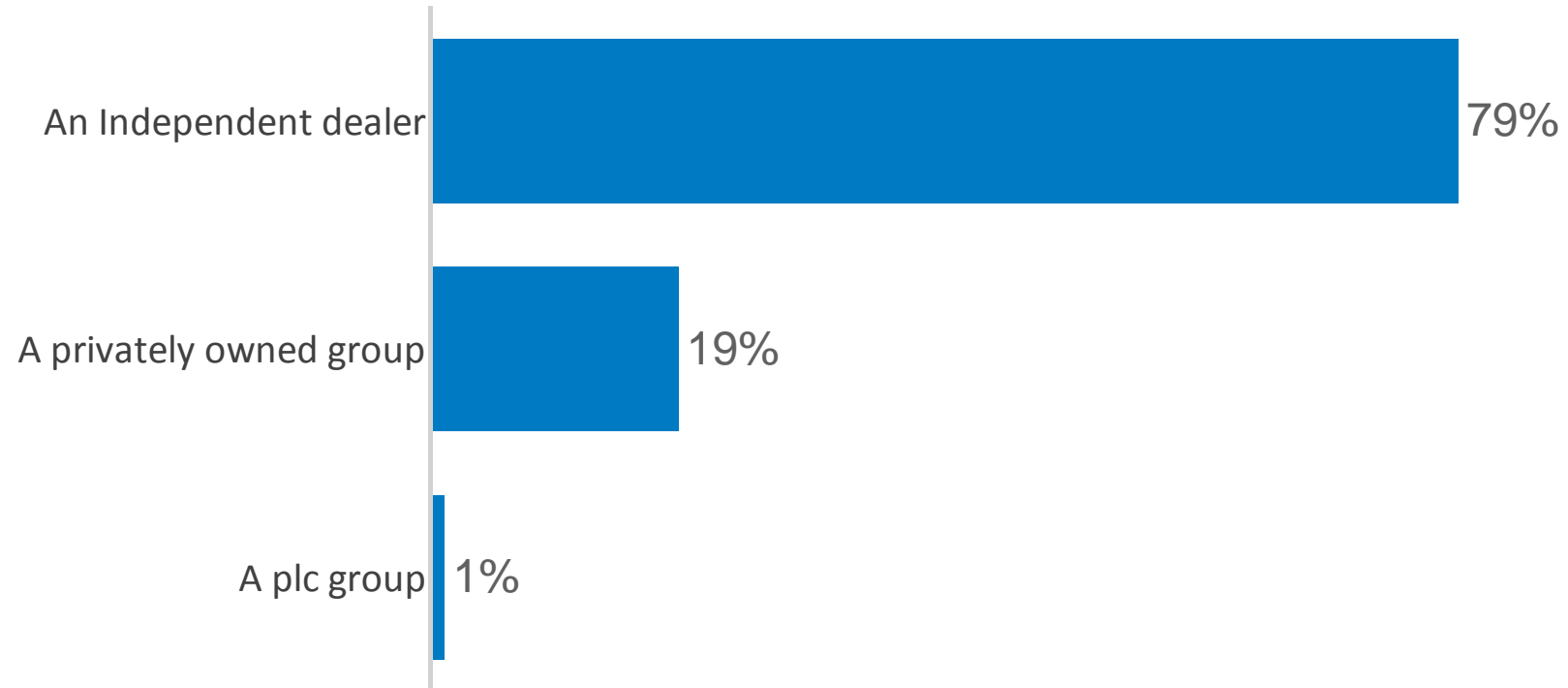
NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY

BREAKDOWN OF RESPONSES

FRANCHISE	NUMBER OF RESPONDENTS	TOTAL NETWORK SIZE	RESPONSE RATE %
HARLEY DAVIDSON	9	30	30
HONDA	39	65	60
KAWASAKI	13	60	22
KTM	9	31	29
PIAGGIO GROUP	25	66	38
SUZUKI	23	114	20
TRIUMPH	20	47	43
YAMAHA	25	113	22
TOTAL	163	520	30

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY

Q2 In this site are you:



SPRING 2018 SURVEY RESULTS

INDEPENDENT	90%
PRIVATELY OWNED	10%
PLC GROUP	0%

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY

Q3 Is this site:

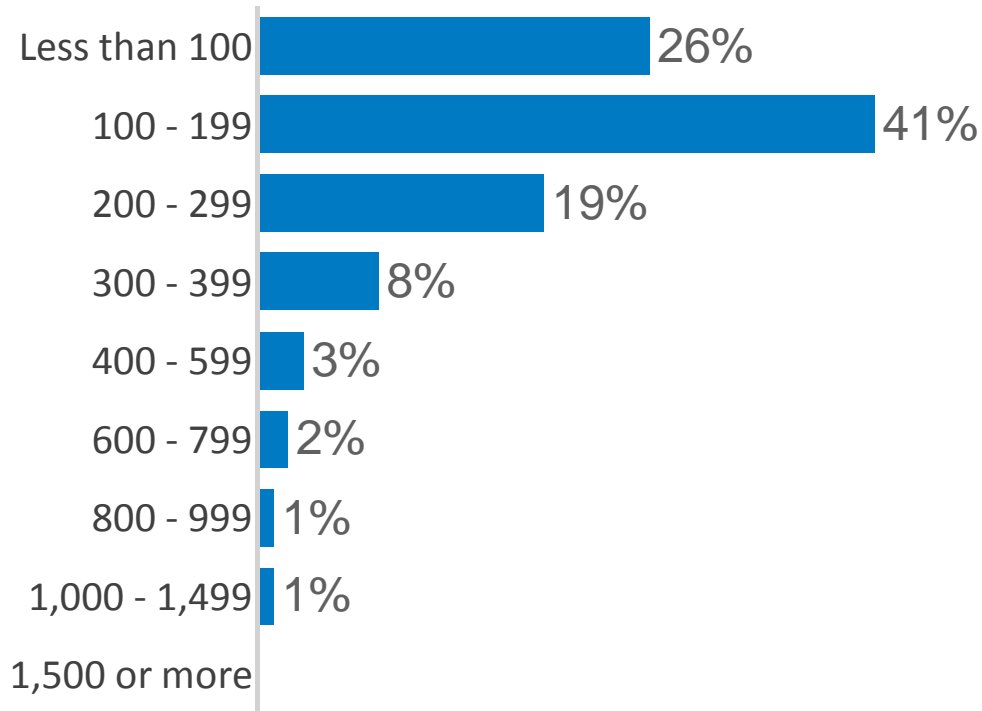


SPRING 2018 SURVEY RESULTS

SOLUS	53%
MULTI-FRANCHISED	47%

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY

Q4 How many new motorcycles do you sell per annum?

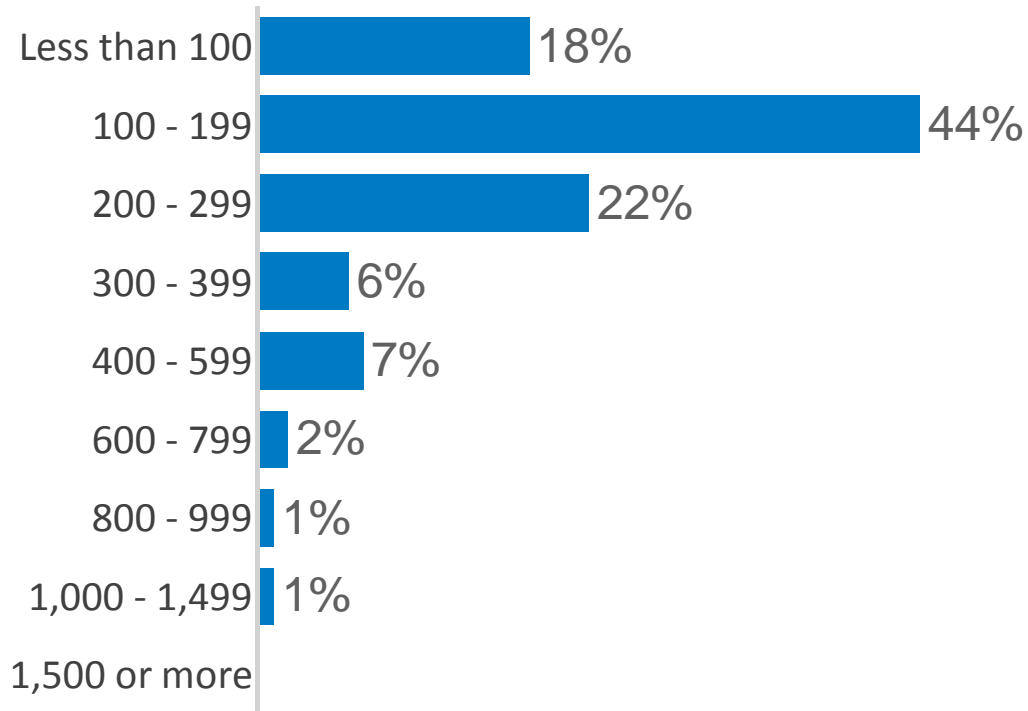


SPRING 2018 SURVEY RESULTS

Less than 100	25%	400 – 599	2%
100 – 199	39%	600 – 799	1%
200 – 299	21%	800 – 999	0%
300 – 399	11%	1000 – 1499	1%
1500 or more	0%		

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY

Q5 How many used motorcycles do you sell per annum?

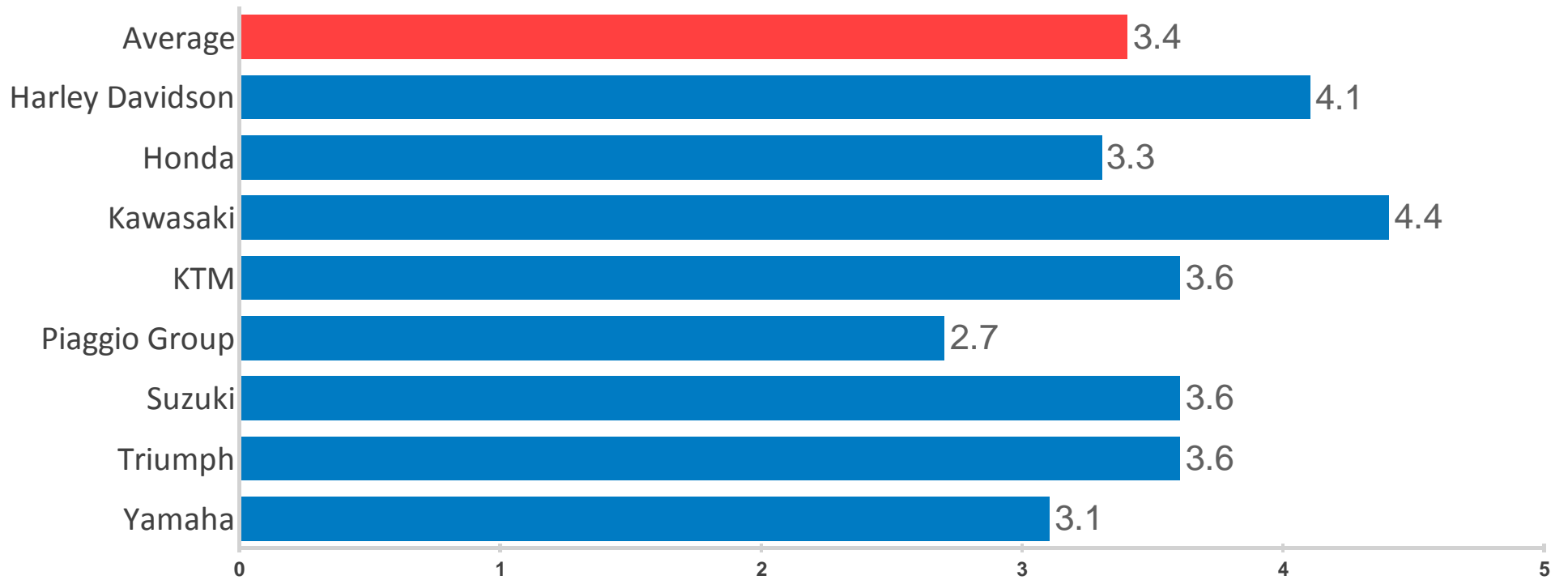


SPRING 2018 SURVEY RESULTS

Less than 100	23%	400 – 599	5%
100 – 199	45%	600 – 799	5%
200 – 299	16%	800 – 999	1%
300 – 399	5%	1000 – 1499	1%
1500 or more	0%		

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY

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

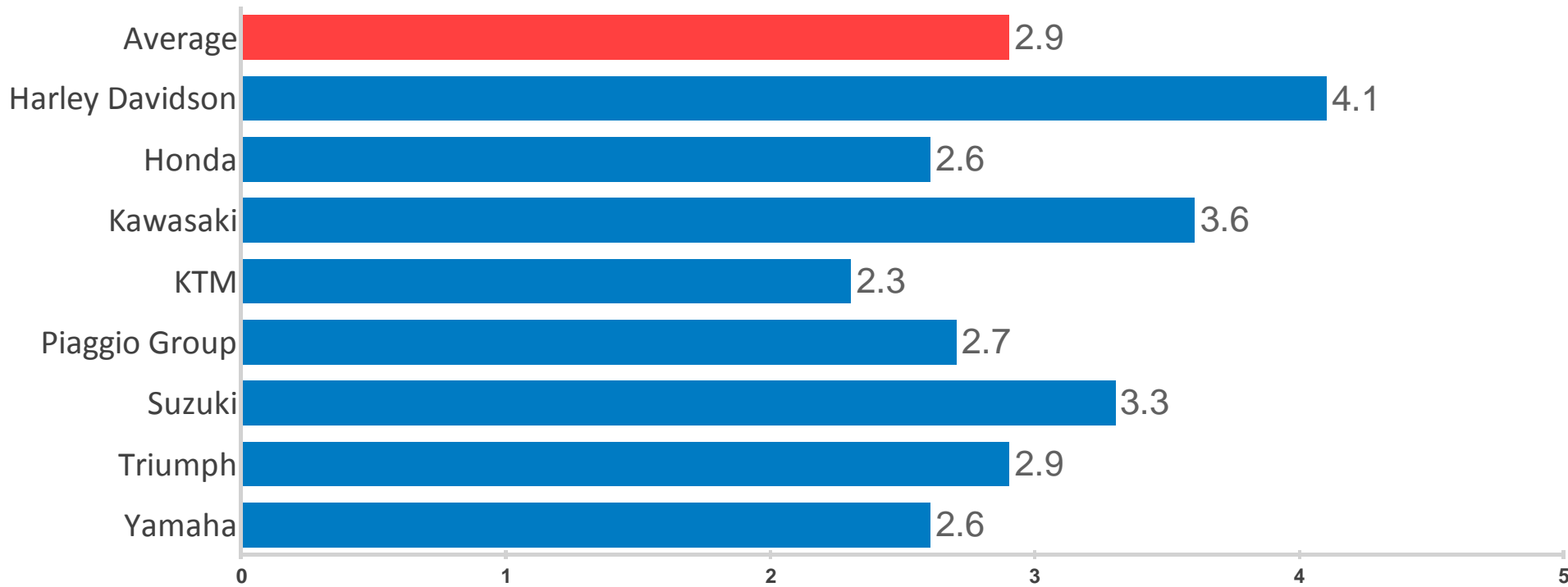


PREVIOUS SURVEY RESULTS – SPRING 2018

6a: The product's price and value against other brands			
		Triumph	3.5
Harley Davidson	4.6	Yamaha	3.3
Honda	3.3		
Kawasaki	4.0		
KTM	4.0		
Piaggio Group	2.4		
Suzuki	3.6	AVERAGE	3.4

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY

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

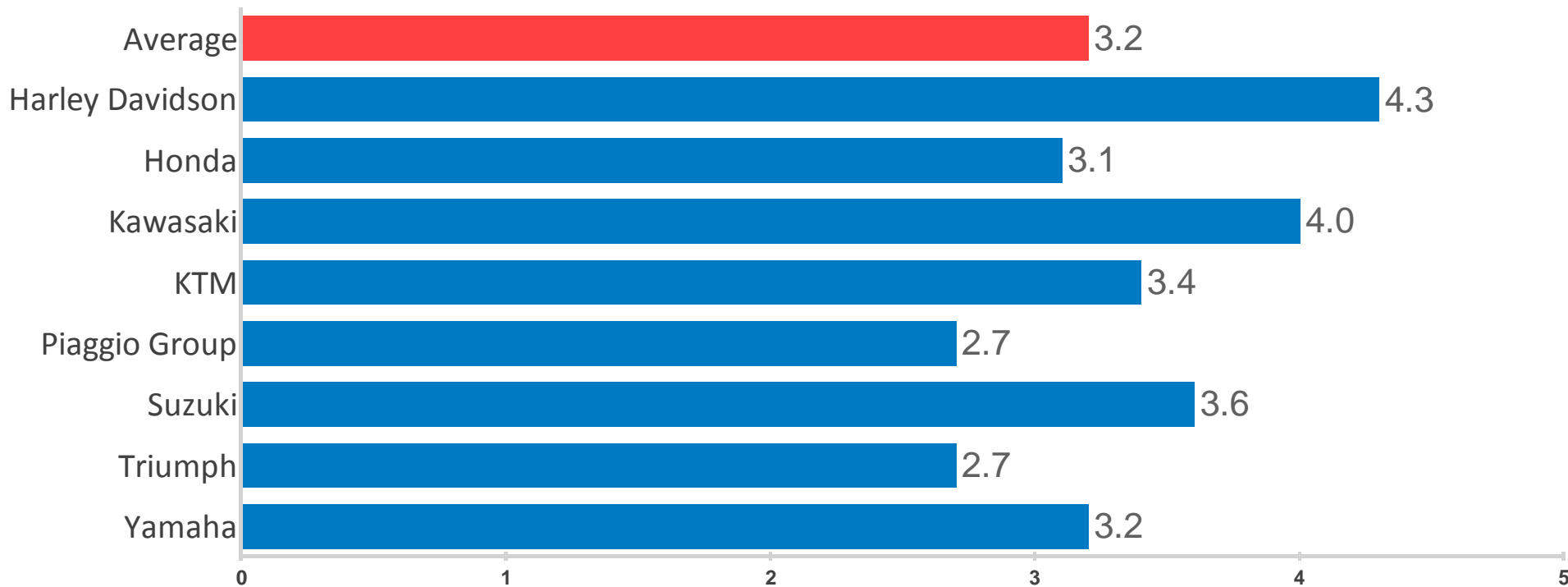


PREVIOUS SURVEY RESULTS – SPRING 2018

6b: How realistic is your target and performance related bonus in terms of achievement			
		Triumph	2.2
Harley Davidson	4.4	Yamaha	2.7
Honda	2.7		
Kawasaki	3.3		
KTM	3.3		
Piaggio Group	3.0		
Suzuki	3.1	AVERAGE	2.9

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY

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

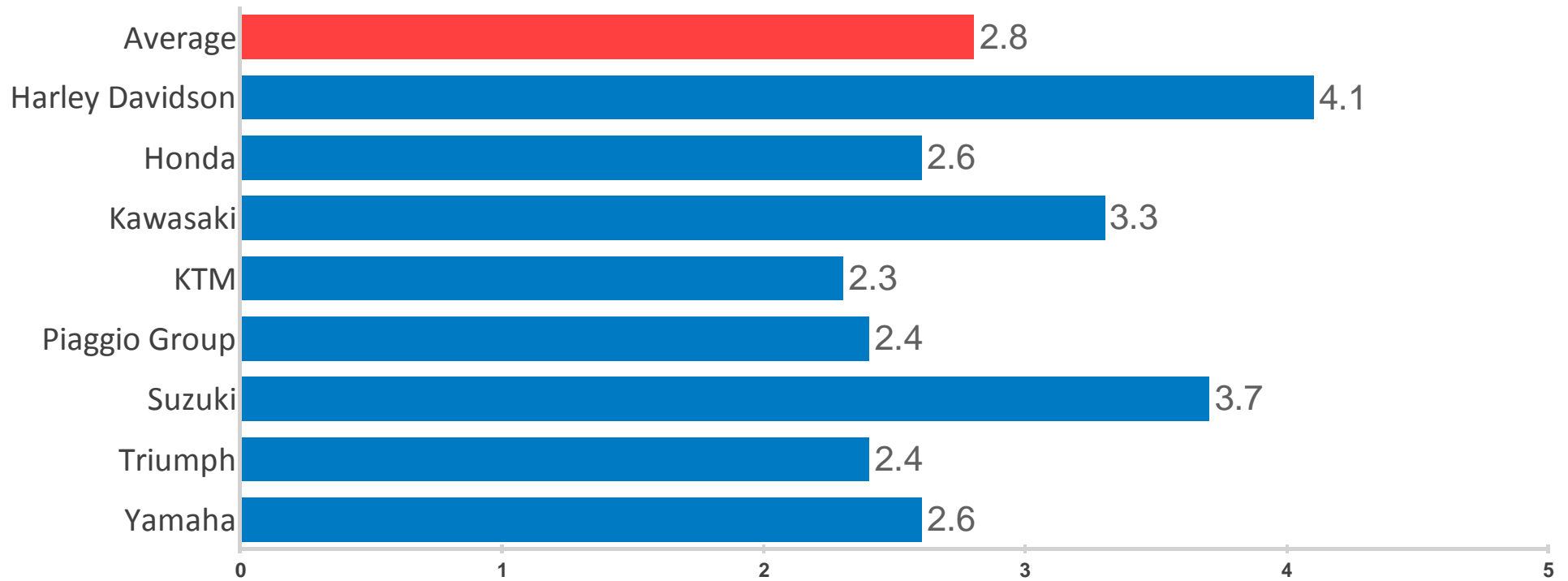


PREVIOUS SURVEY RESULTS – SPRING 2018

7a: The fairness of your manufacturer's policy for the supply and stocking of motorcycles			
		Triumph	2.7
Harley Davidson	4.0	Yamaha	3.1
Honda	3.0		
Kawasaki	3.3		
KTM	2.9		
Piaggio Group	2.9		
Suzuki	2.8	AVERAGE	3.0

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY

Q7 b) The new motorcycle target negotiating process

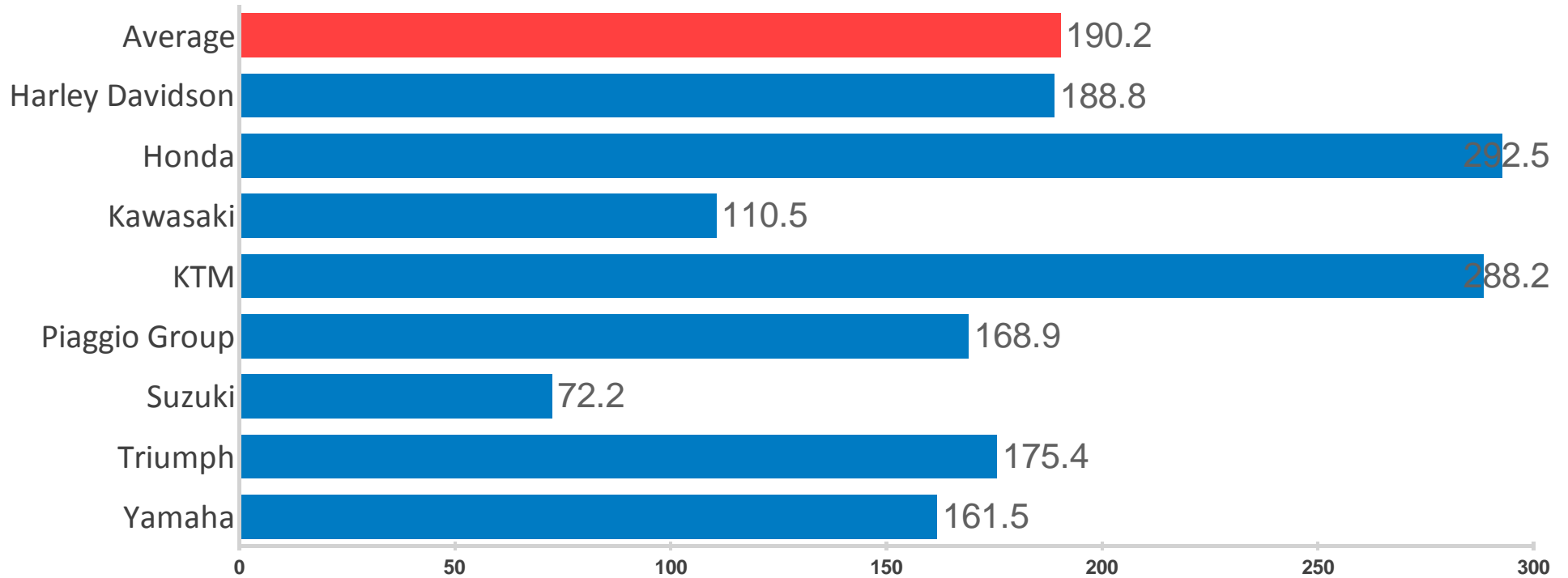


PREVIOUS SURVEY RESULTS – SPRING 2018

7b: Your new motorcycle target negotiating process			
		Triumph	1.8
Harley Davidson	4.4	Yamaha	2.5
Honda	2.8		
Kawasaki	2.9		
KTM	2.6		
Piaggio Group	2.9		
Suzuki	3.1	AVERAGE	2.7

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY

Q7c) What is your annual target for this brand?

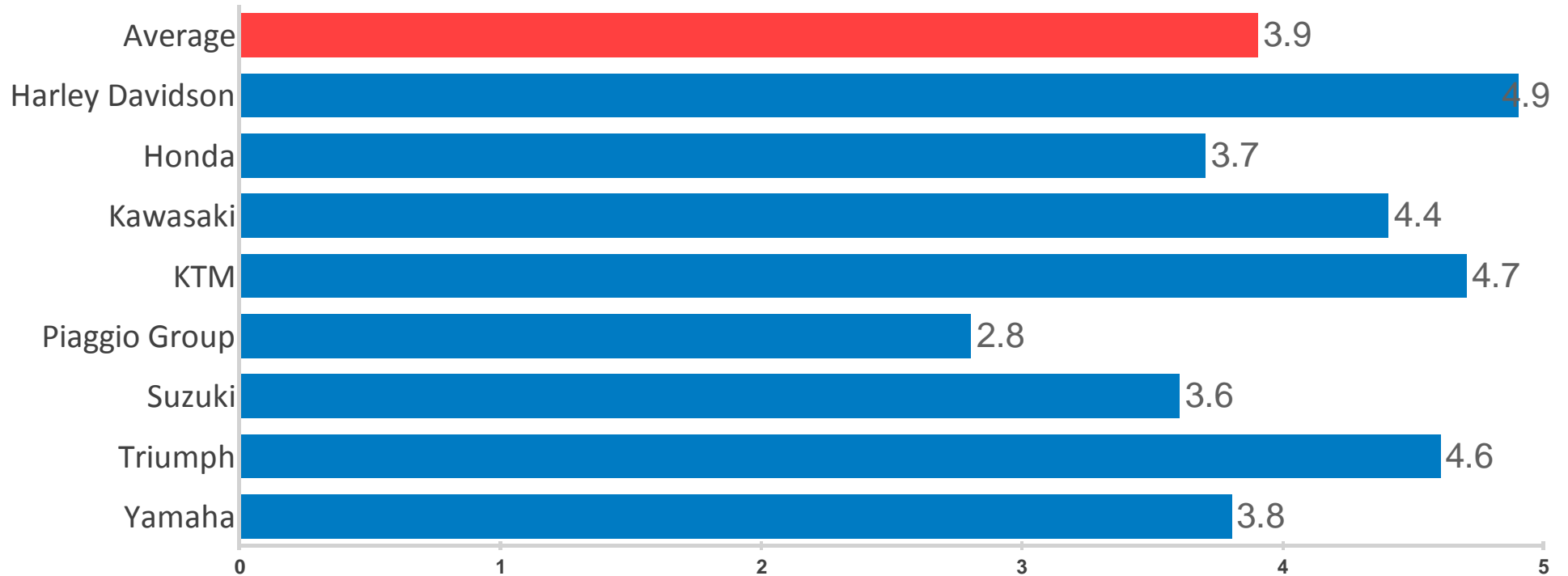


PREVIOUS SURVEY RESULTS – SPRING 2018

7c: What is your annual target for this brand			
		Triumph	208.9
Harley Davidson	128.8	Yamaha	145.8
Honda	280.4		
Kawasaki	119.8		
KTM	259.3		
Piaggio Group	104.3		
Suzuki	88.3	AVERAGE	169.0

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY

Q8 a) The brand image

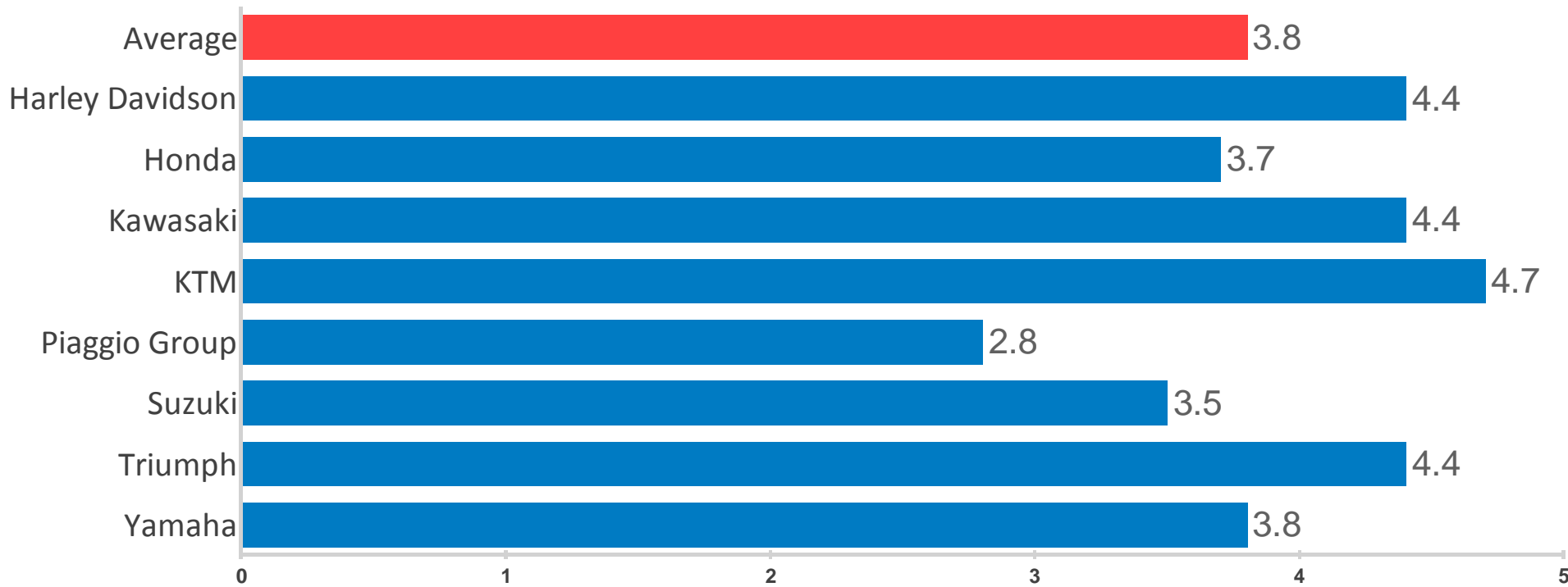


PREVIOUS SURVEY RESULTS – SPRING 2018

8a: The brand image			
		Triumph	4.4
Harley Davidson	5.0	Yamaha	3.9
Honda	4.0		
Kawasaki	4.4		
KTM	4.4		
Piaggio Group	3.5		
Suzuki	3.5	AVERAGE	4.0

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY

Q8 b) The product image

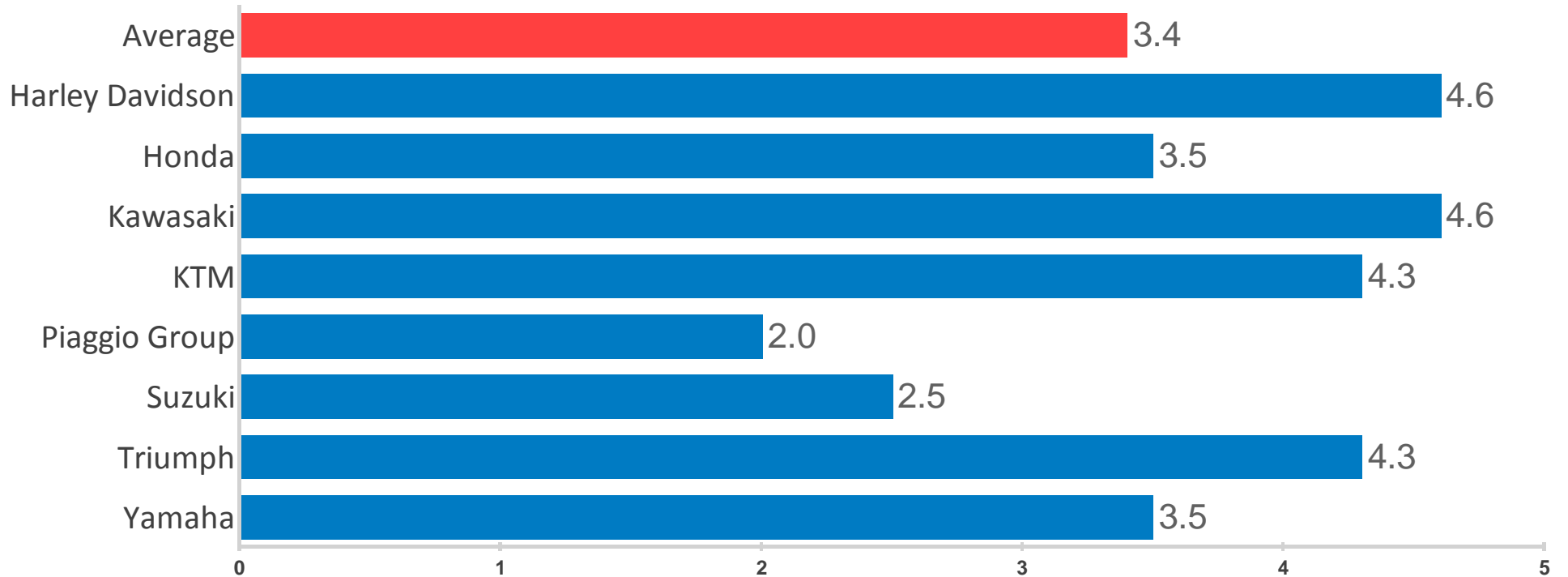


PREVIOUS SURVEY RESULTS – SPRING 2018

8b: The product image			
		Triumph	4.3
Harley Davidson	5.0	Yamaha	4.1
Honda	4.0		
Kawasaki	4.4		
KTM	4.5		
Piaggio Group	3.5		
Suzuki	3.3	AVERAGE	4.0

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY

Q8 c) Frequency of introduction of new models

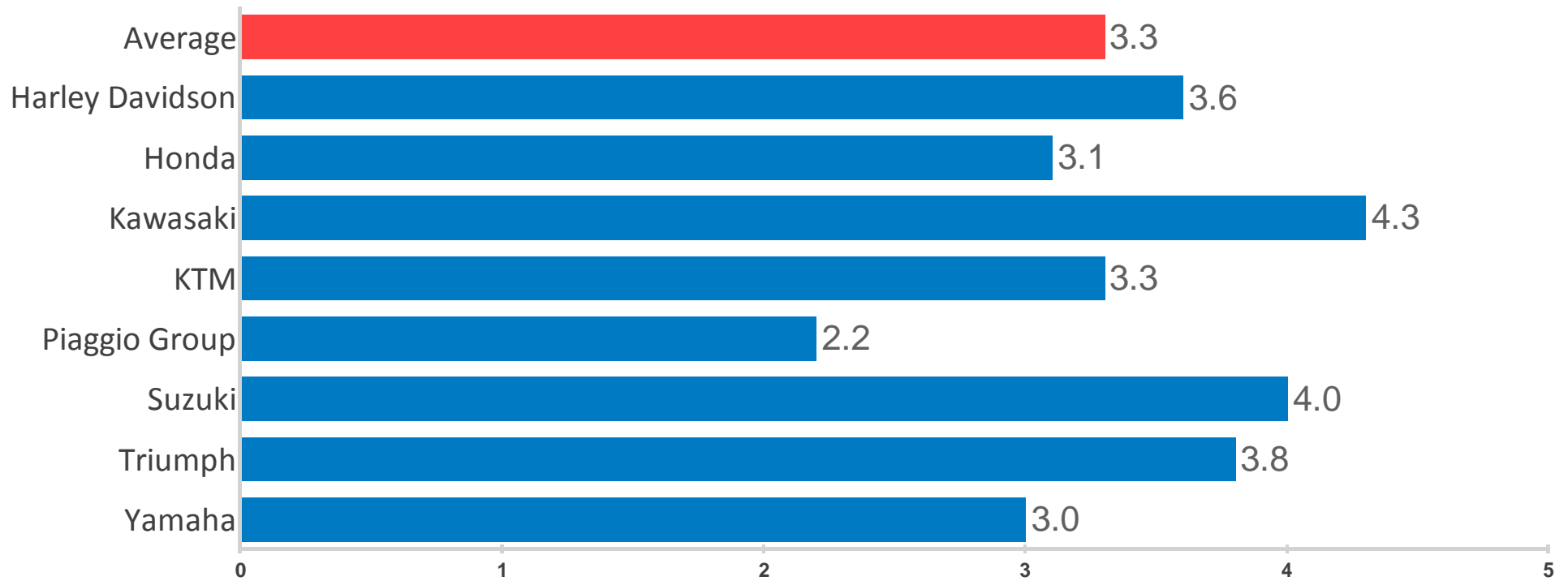


PREVIOUS SURVEY RESULTS – SPRING 2018

8c: Frequency of introduction of new models			
		Triumph	4.1
Harley Davidson	5.0	Yamaha	3.8
Honda	3.9		
Kawasaki	4.4		
KTM	4.3		
Piaggio Group	2.5		
Suzuki	2.5	AVERAGE	3.7

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY

Q8 d) Retail sales incentives and promotions

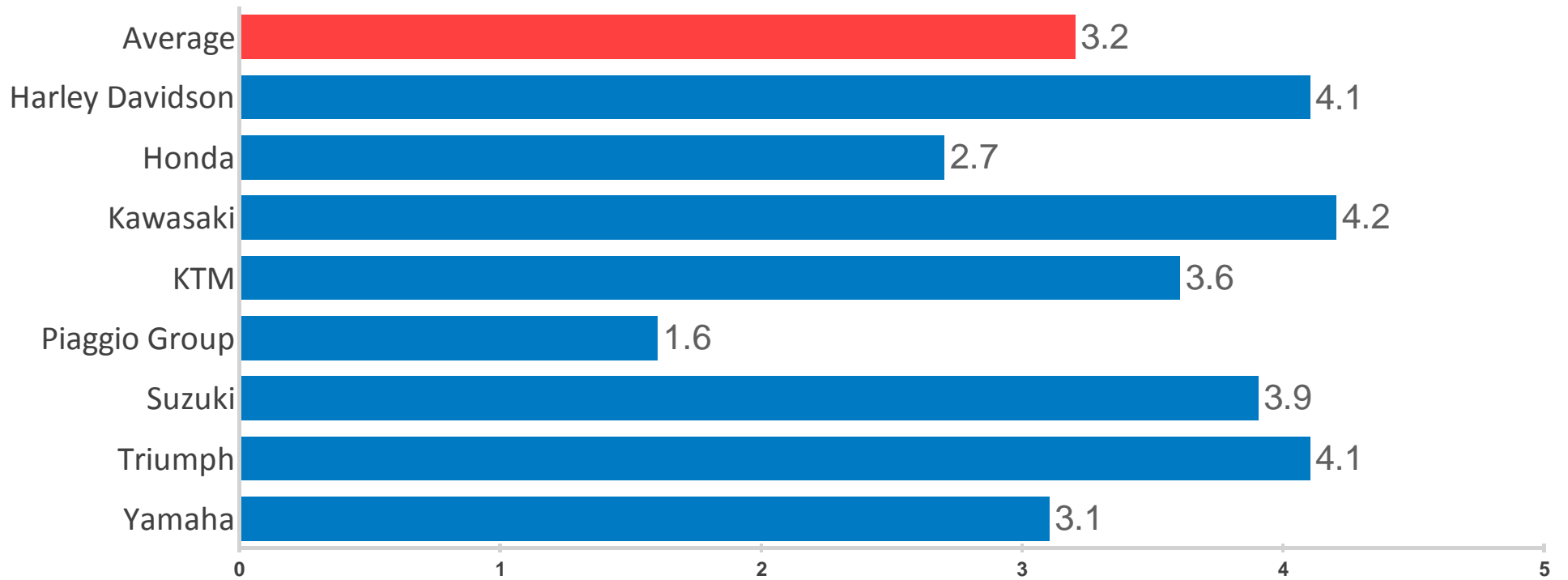


PREVIOUS SURVEY RESULTS – SPRING 2018

8d: Retail sales incentives and promotions			
		Triumph	3.1
Harley Davidson	3.8	Yamaha	2.9
Honda	3.2		
Kawasaki	3.9		
KTM	3.9		
Piaggio Group	3.4		
Suzuki	3.9	AVERAGE	3.3

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY

Q8 e) Product advertising

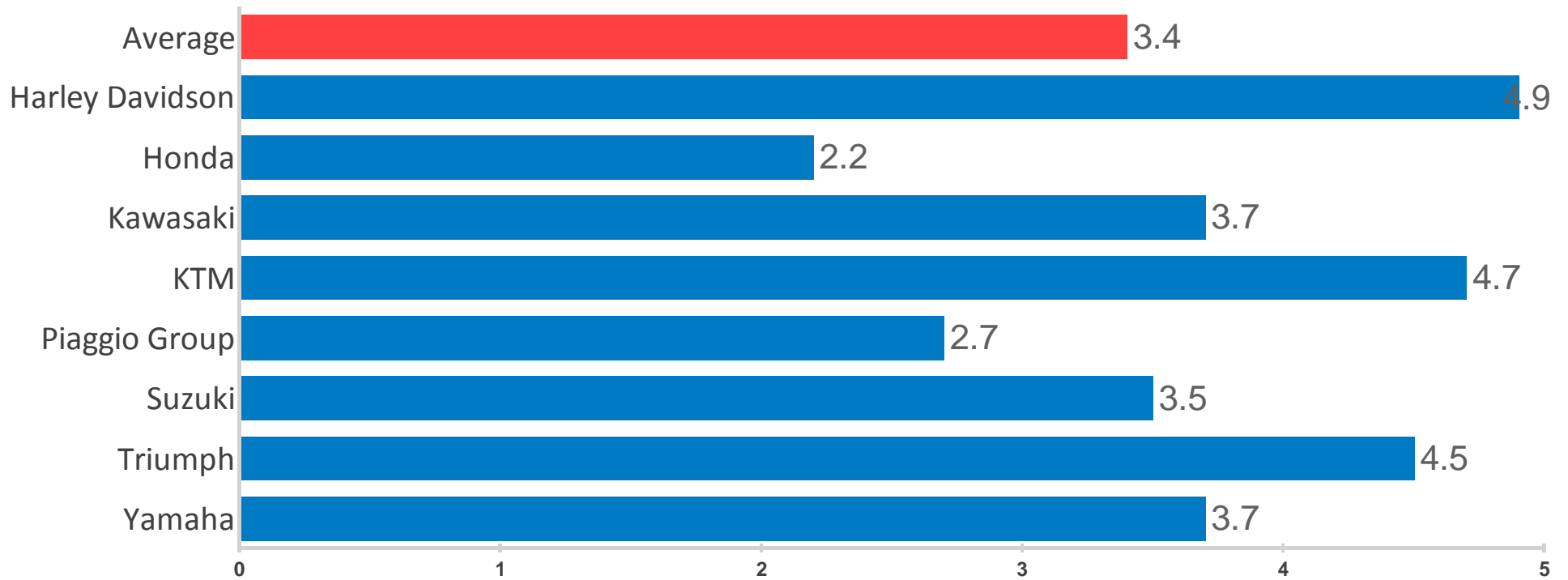


PREVIOUS SURVEY RESULTS – SPRING 2018

8e: Product advertising			
		Triumph	3.6
Harley Davidson	3.8	Yamaha	3.2
Honda	3.0		
Kawasaki	3.8		
KTM	3.6		
Piaggio Group	2.3		
Suzuki	3.7	AVERAGE	3.2

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY

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

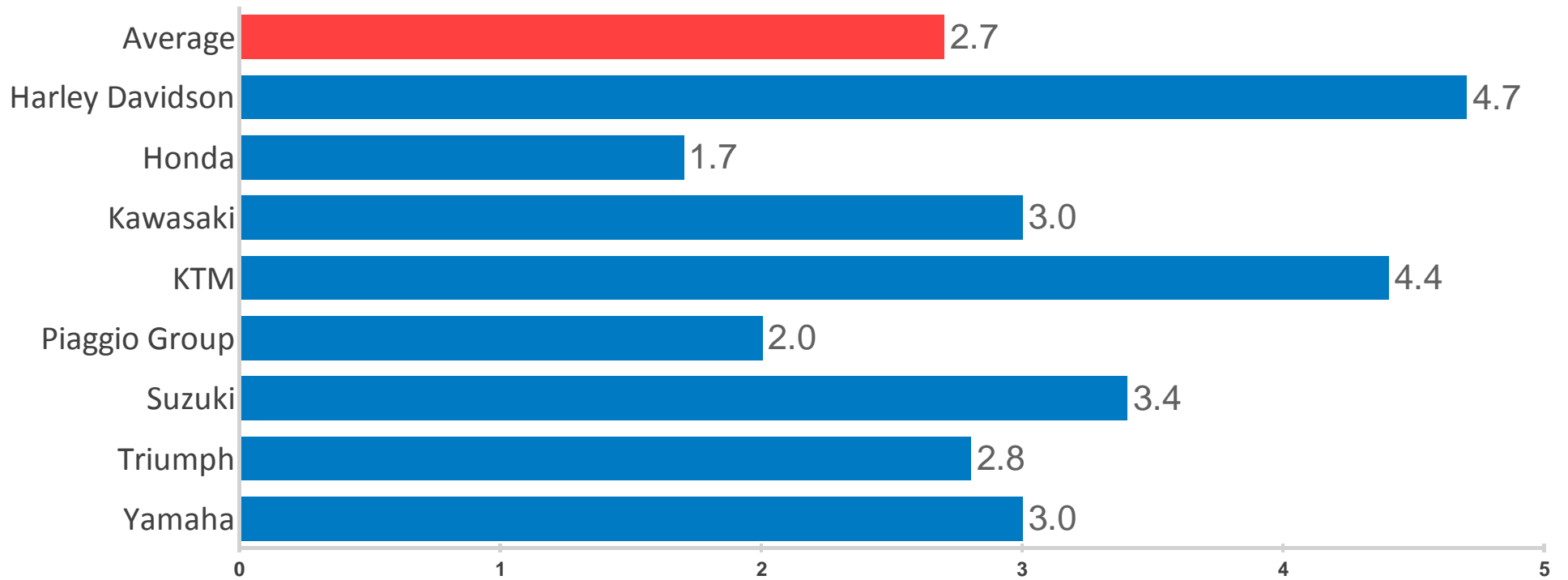


PREVIOUS SURVEY RESULTS – SPRING 2018

8f: Have a comprehensive accessory offering that appeals to customers			
		Triumph	4.2
Harley Davidson	4.4	Yamaha	4.0
Honda	2.1		
Kawasaki	3.7		
KTM	4.5		
Piaggio Group	3.3		
Suzuki	3.7	AVERAGE	3.6

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY

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

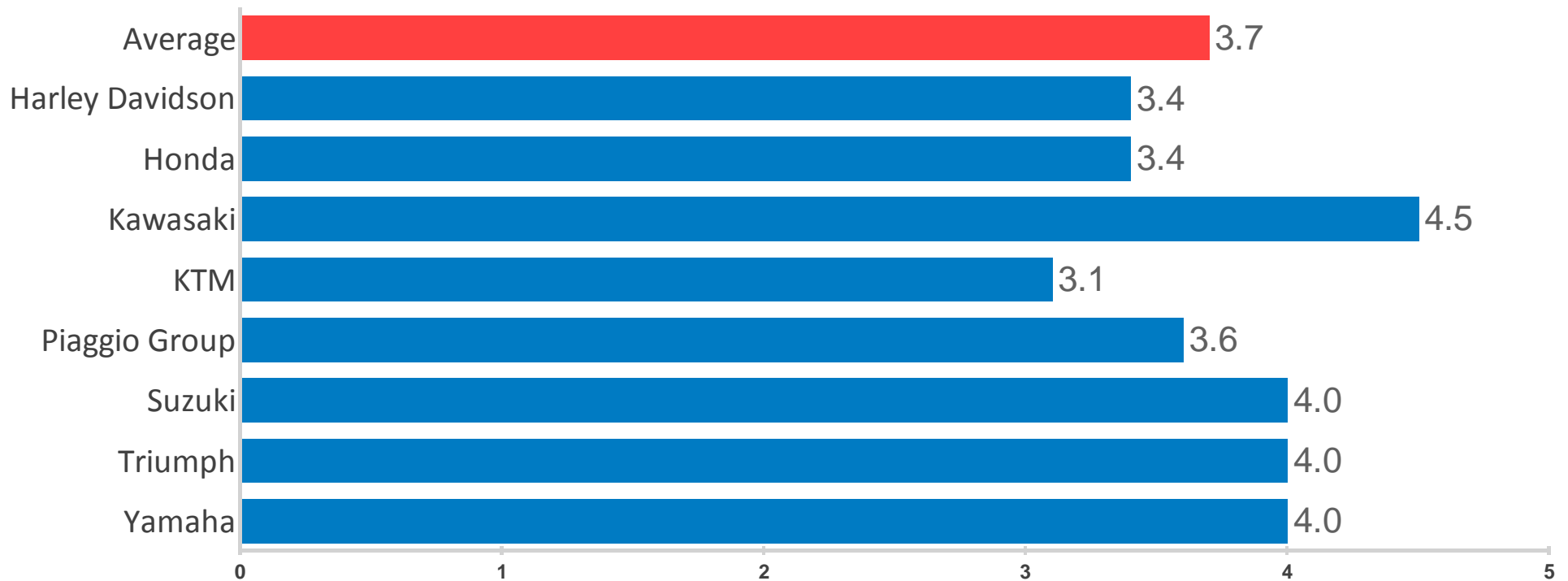


PREVIOUS SURVEY RESULTS – SPRING 2018

8g: Have a comprehensive clothing offering that appeals to customers			
		Triumph	3.3
Harley Davidson	4.6	Yamaha	3.3
Honda	1.6		
Kawasaki	3.2		
KTM	3.8		
Piaggio Group	2.7		
Suzuki	3.2	AVERAGE	2.9

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY

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



PREVIOUS SURVEY RESULTS – SPRING 2018

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

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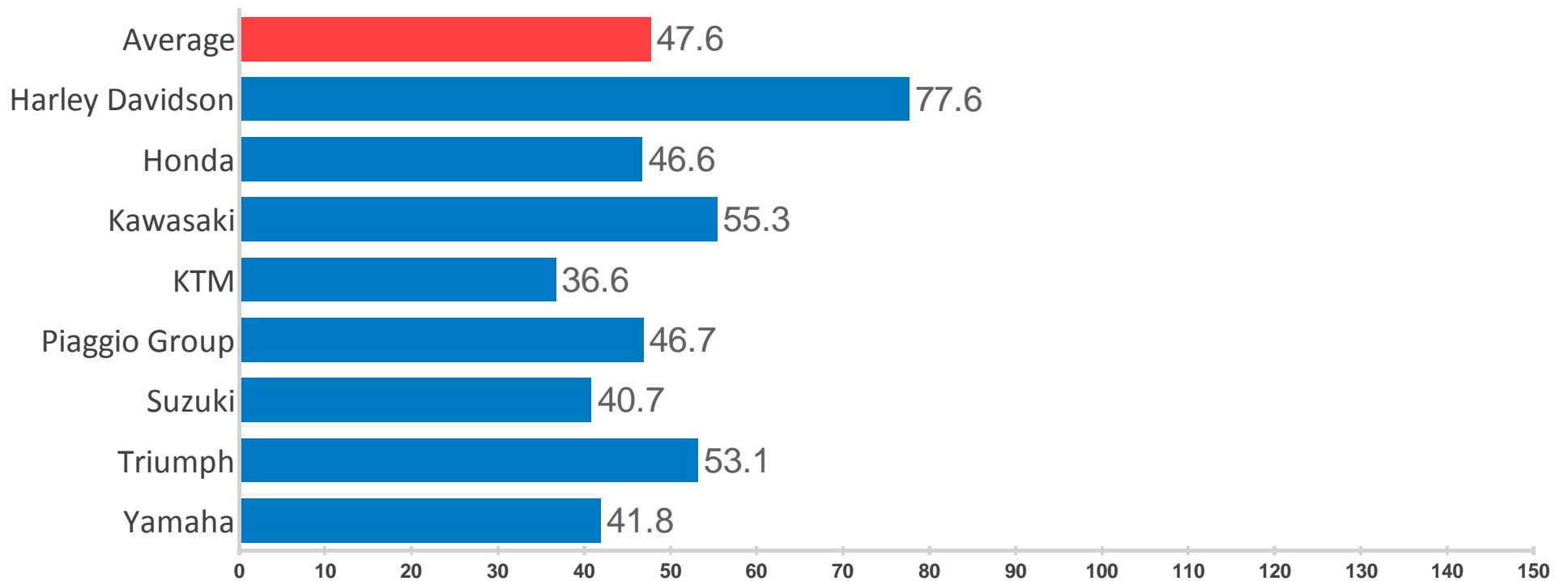
PREVIOUS SURVEY RESULTS – SPRING 2018

10: What is your labour rate for retail (£)			
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		Triumph	60.6
Harley Davidson	73.6	Yamaha	56.3
Honda	58.2		
Kawasaki	56.4		
KTM	49.3		
Piaggio Group	57.6		
Suzuki	55.8	AVERAGE	57.5

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



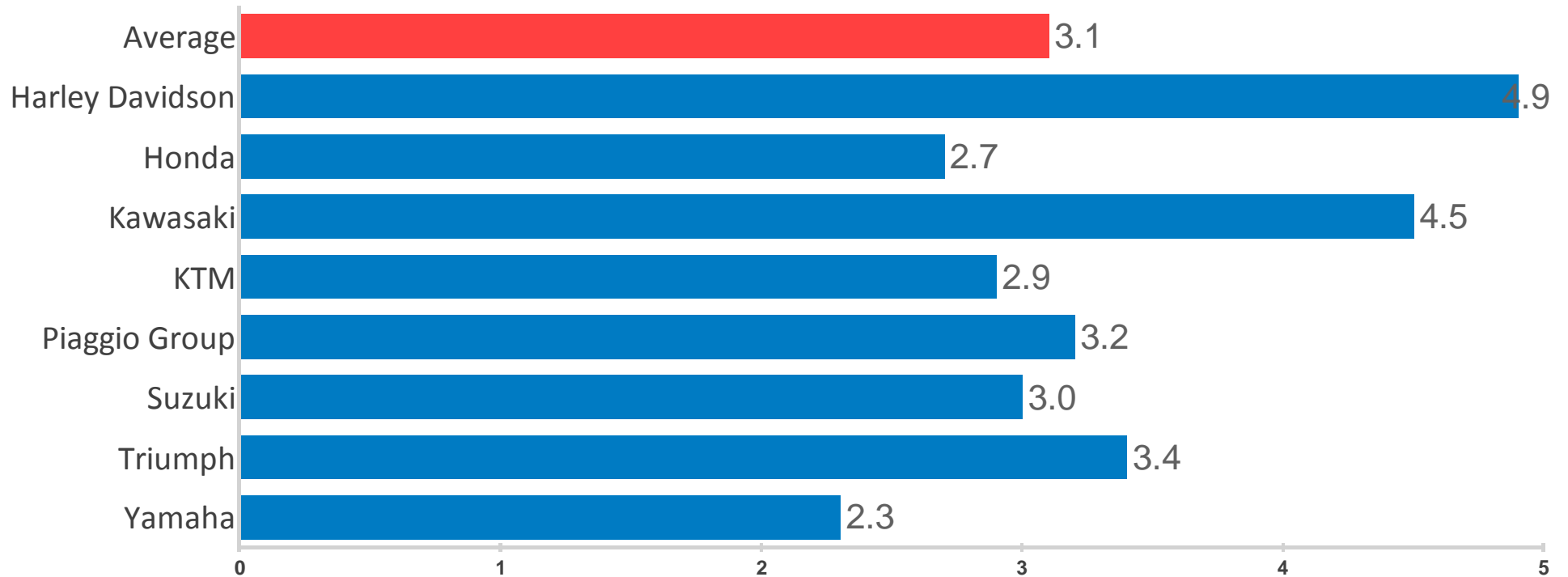
PREVIOUS SURVEY RESULTS – SPRING 2018

11. What is your labour rate for warranty (£)			
		Triumph	54.4
Harley Davidson	73.6	Yamaha	42.3
Honda	45.9		

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Kawasaki	57.6		
KTM	40.0		
Piaggio Group	44.3		
Suzuki	38.8	AVERAGE	46.7

Q12 a) Warranty labour rate



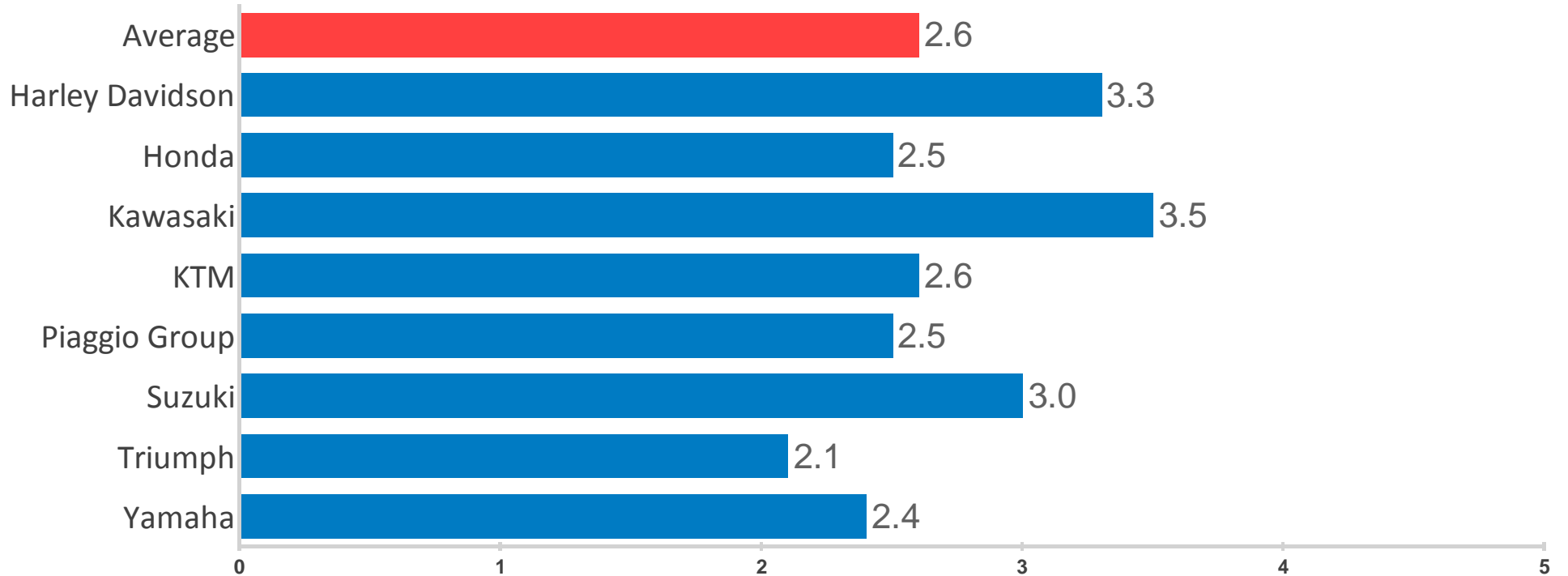
PREVIOUS SURVEY RESULTS – SPRING 2018

12a: Warranty labour rate			
		Triumph	3.4
Harley Davidson	4.8	Yamaha	2.6
Honda	2.9		
Kawasaki	4.1		
KTM	3.0		
Piaggio Group	3.3		

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Suzuki	2.6	AVERAGE	3.1
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Q12 b) Warranty time allowances

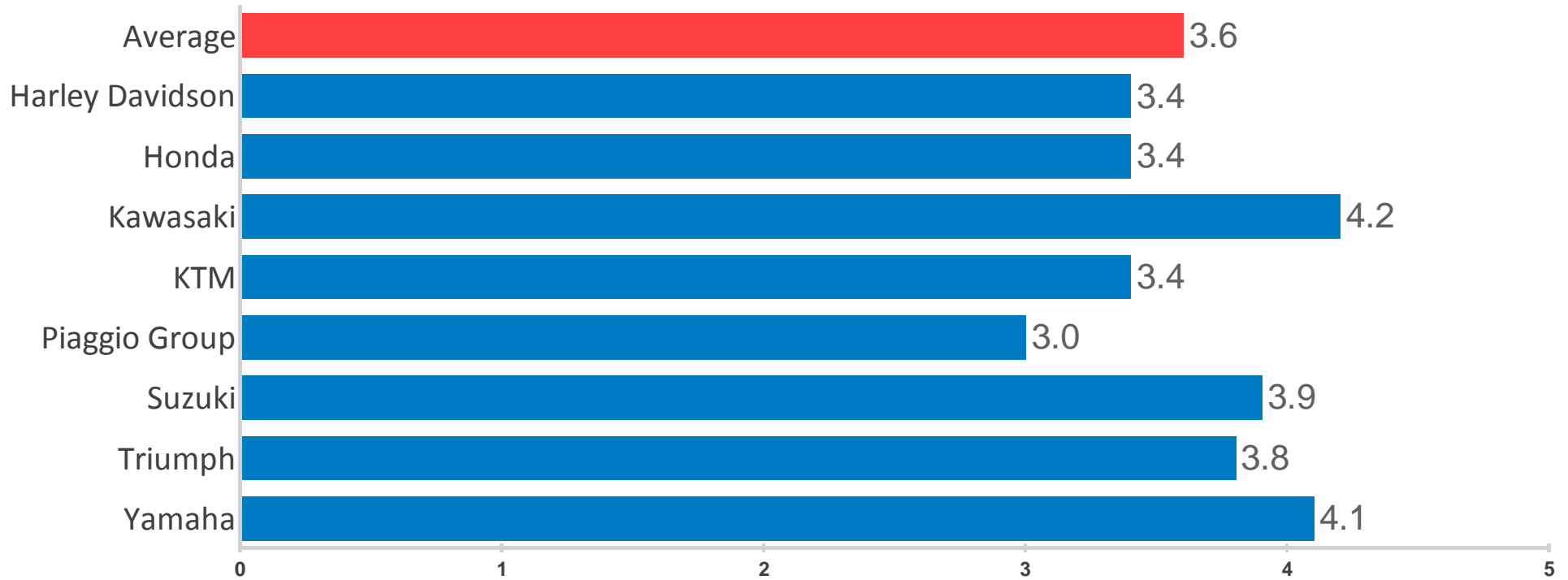


PREVIOUS SURVEY RESULTS – SPRING 2018

12b: Warranty time allowances			
		Triumph	2.4
Harley Davidson	4.4	Yamaha	2.6
Honda	2.5		
Kawasaki	3.4		
KTM	2.3		
Piaggio Group	2.8		
Suzuki	2.8	AVERAGE	2.7

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Q12 c) Warranty replacement parts policy

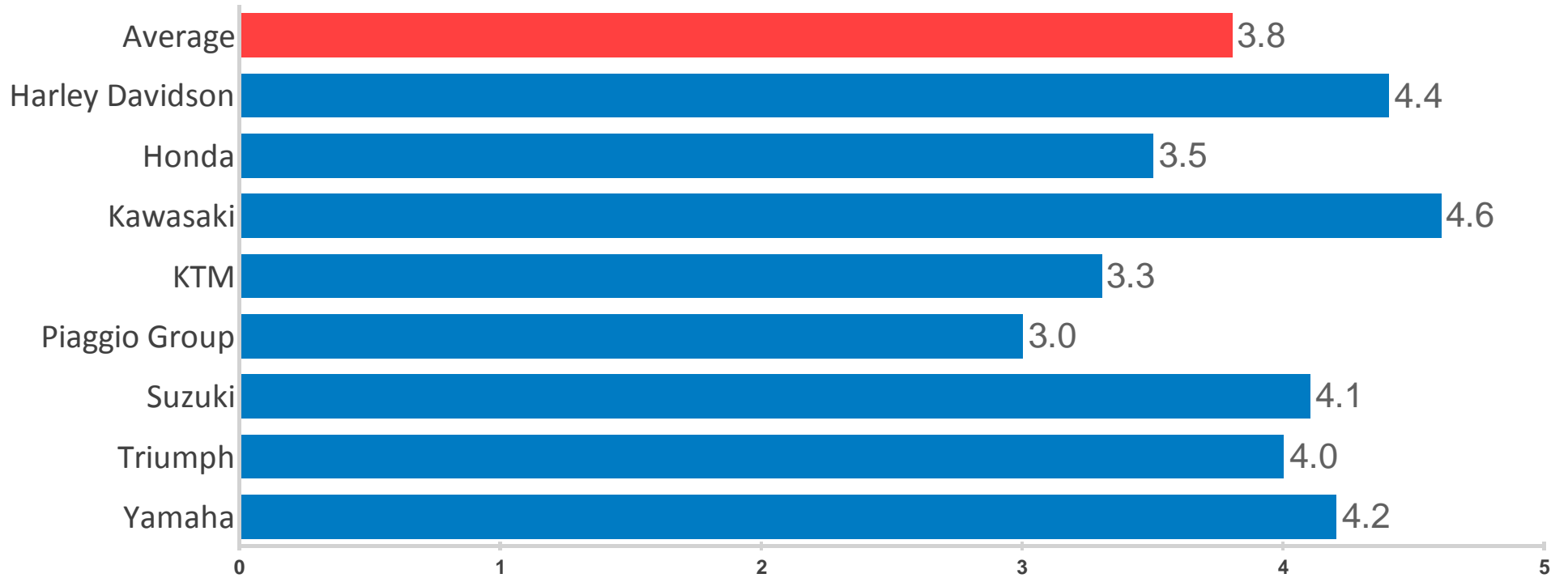


PREVIOUS SURVEY RESULTS – SPRING 2018

12c: Warranty replacement parts policy			
		Triumph	3.5
Harley Davidson	4.4	Yamaha	4.3
Honda	3.6		
Kawasaki	4.2		
KTM	3.5		
Piaggio Group	3.2		
Suzuki	3.6	AVERAGE	3.8

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY

Q12 d) Timely and fair settlement of warranty claims

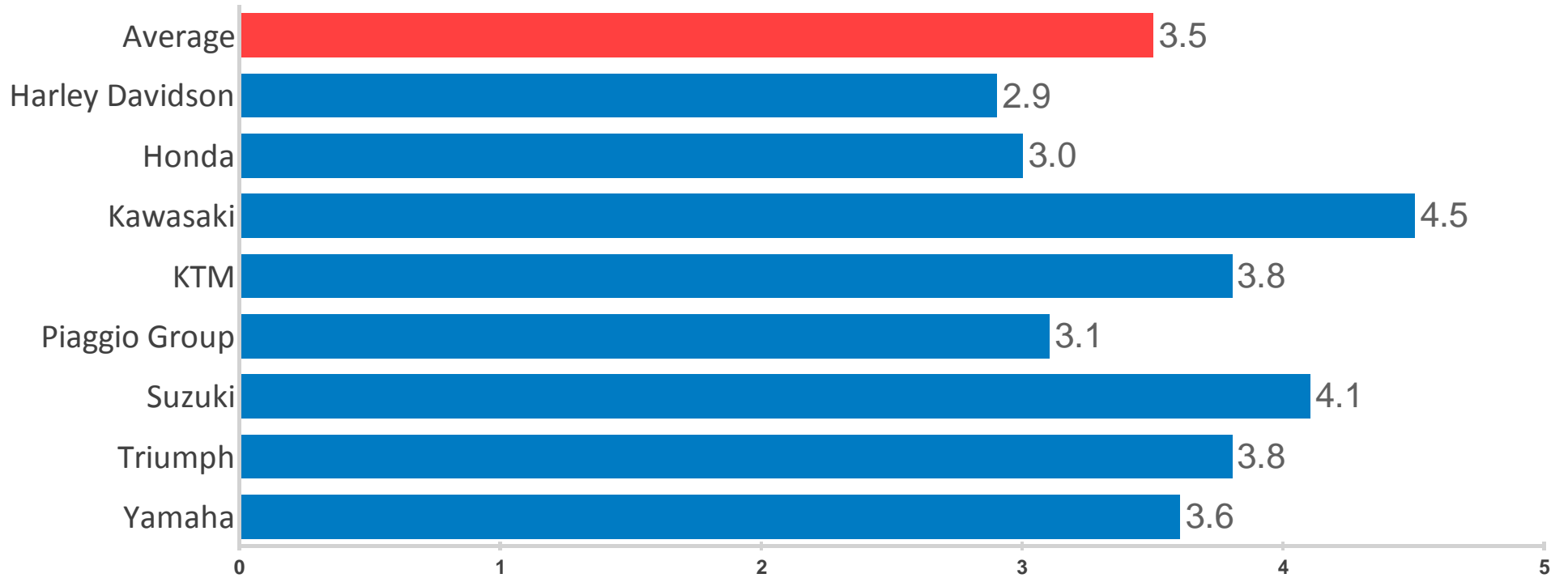


PREVIOUS SURVEY RESULTS – SPRING 2018

12d: Timely and fair settlement of warranty claims			
		Triumph	3.8
Harley Davidson	4.2	Yamaha	4.1
Honda	3.8		
Kawasaki	4.3		
KTM	3.8		
Piaggio Group	3.1		
Suzuki	3.9	AVERAGE	3.8

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY

Q12 e) Quality and availability of technical support

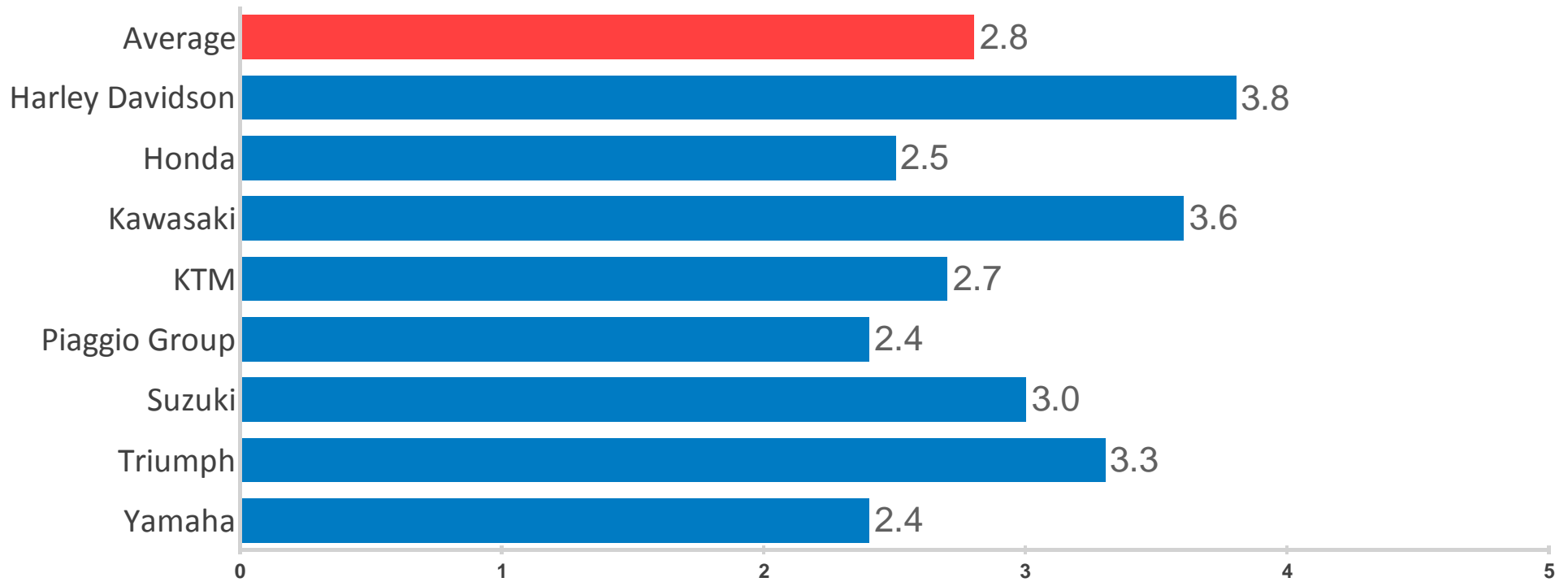


PREVIOUS SURVEY RESULTS – SPRING 2018

12e: Quality and availability of technical support			
		Triumph	3.3
Harley Davidson	3.8	Yamaha	3.7
Honda	3.1		
Kawasaki	4.3		
KTM	4.1		
Piaggio Group	3.3		
Suzuki	3.7	AVERAGE	3.5

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY

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

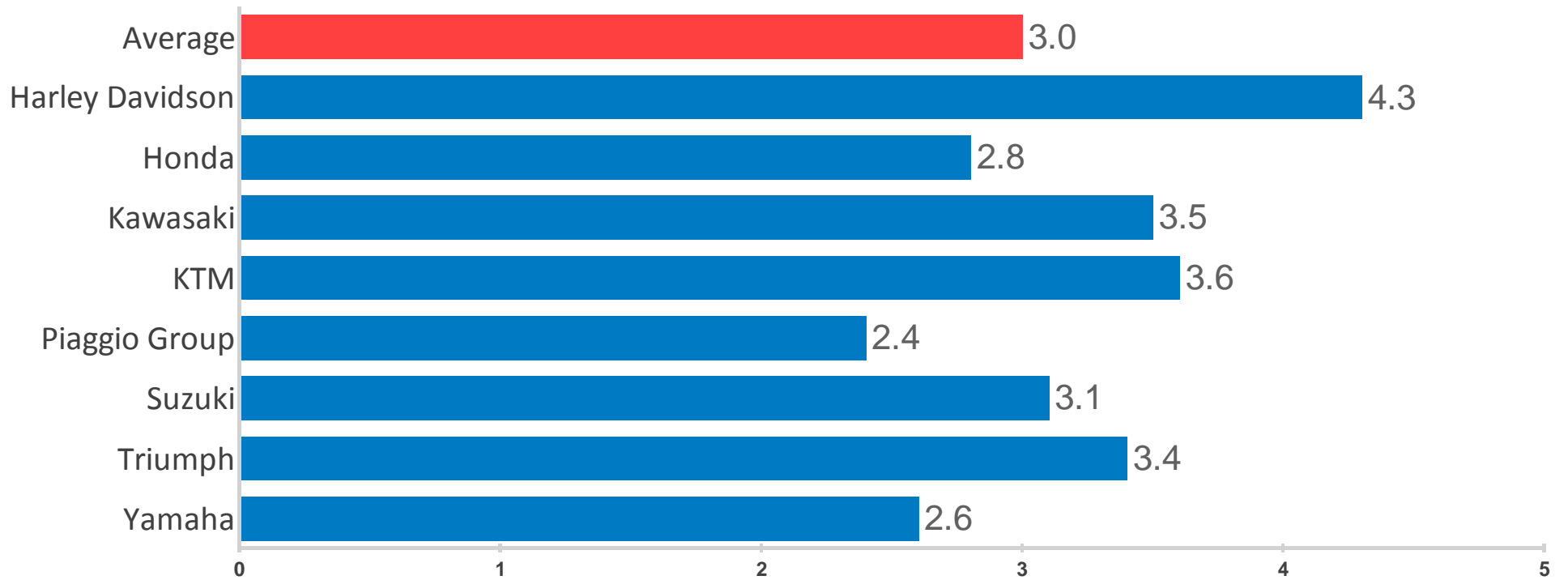


PREVIOUS SURVEY RESULTS – SPRING 2018

13: The profit return by representing your franchise			
		Triumph	2.9
Harley Davidson	4.2	Yamaha	2.7
Honda	3.0		
Kawasaki	3.4		
KTM	3.9		
Piaggio Group	2.7		
Suzuki	2.5	AVERAGE	2.9

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY

Q14 a) The future profitability of your business

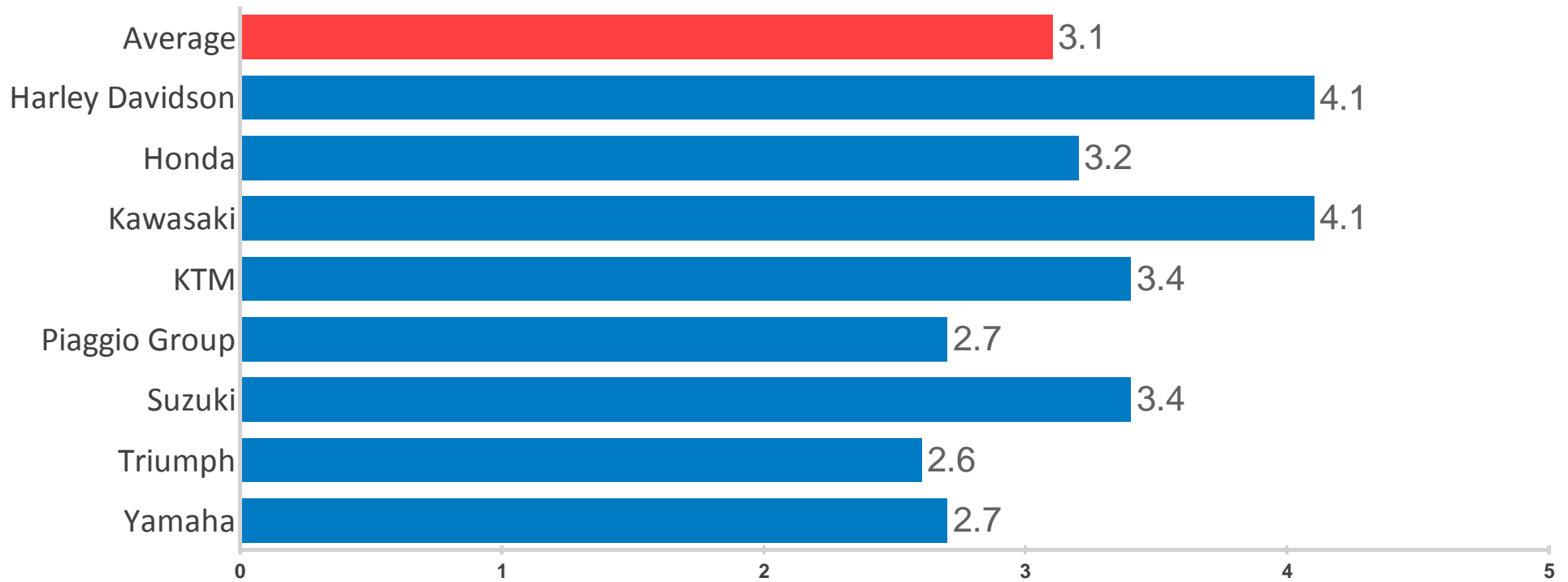


PREVIOUS SURVEY RESULTS – SPRING 2018

14a: The future profitability of your business			
		Triumph	2.8
Harley Davidson	4.2	Yamaha	2.8
Honda	2.9		
Kawasaki	3.6		
KTM	4.0		
Piaggio Group	3.1		
Suzuki	3.2	AVERAGE	3.1

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY

Q14 b) Your stocking plan for this franchise

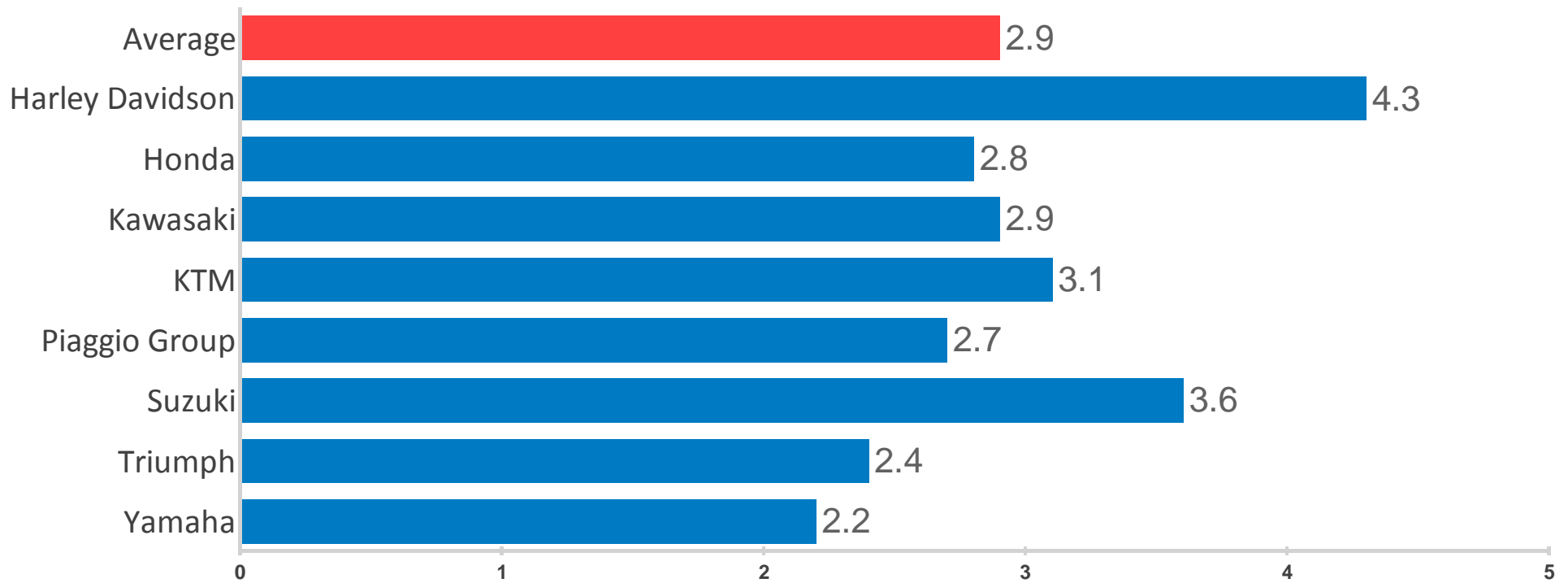


PREVIOUS SURVEY RESULTS – SPRING 2018

14b: Your stocking plan for this franchise			
		Triumph	2.4
Harley Davidson	4.2	Yamaha	3.1
Honda	3.0		
Kawasaki	3.6		
KTM	3.3		
Piaggio Group	2.8		
Suzuki	3.1	AVERAGE	3.1

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY

Q15 a) The dealer standards expected by your manufacturer

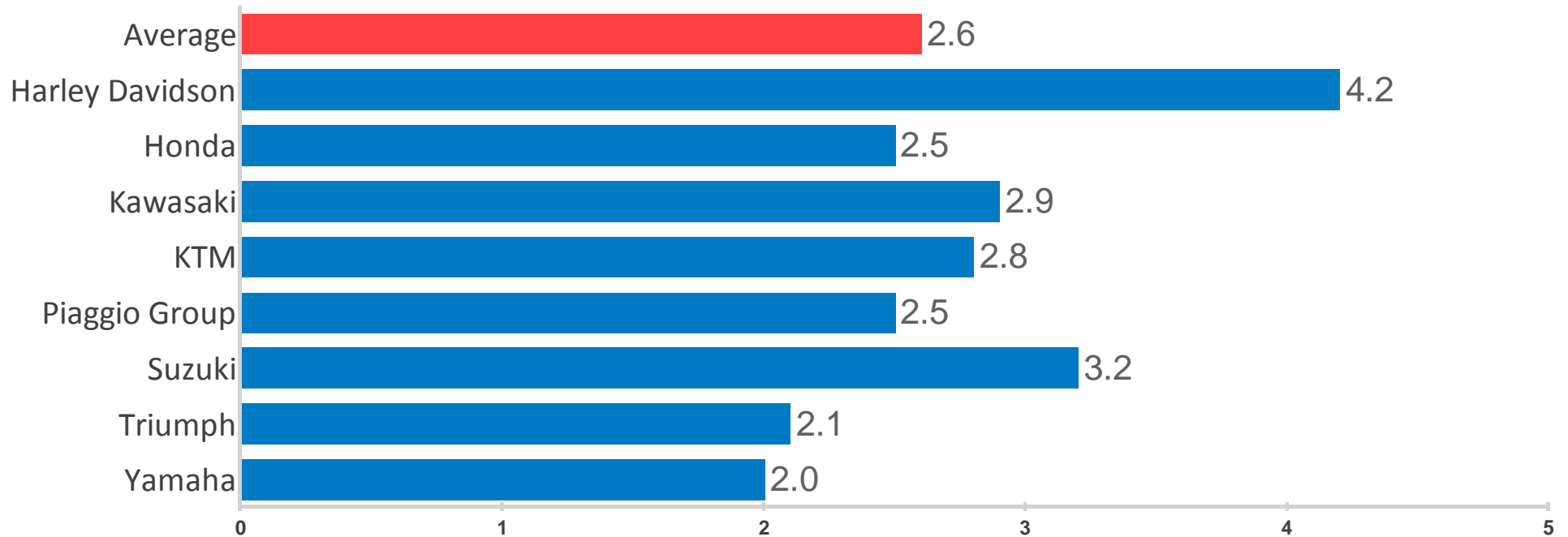


PREVIOUS SURVEY RESULTS – SPRING 2018

15a: The dealer standards expected by your manufacturer			
		Triumph	2.3
Harley Davidson	4.0	Yamaha	2.4
Honda	2.9		
Kawasaki	2.6		
KTM	2.9		
Piaggio Group	3.0		
Suzuki	3.2	AVERAGE	2.8

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY

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

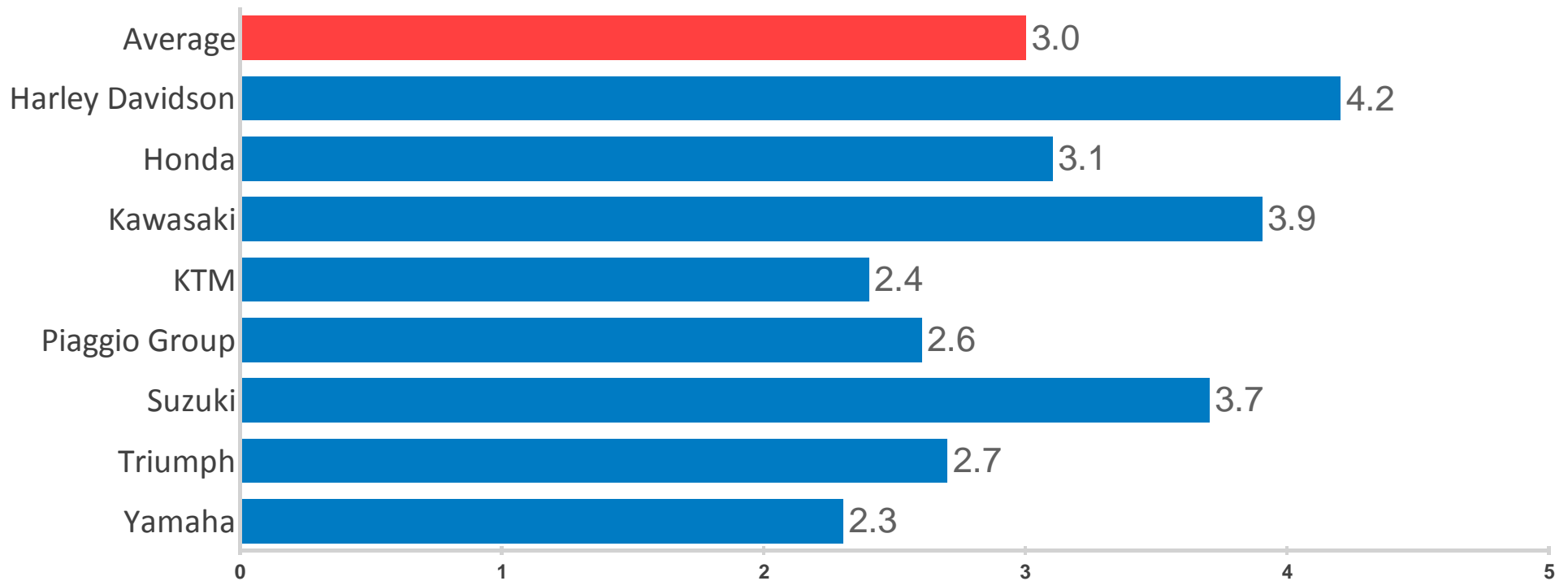


PREVIOUS SURVEY RESULTS – SPRING 2018

15b: How realistic do you feel your manufacturer's standards are compared with the return on investment/reward			
		Triumph	2.1
Harley Davidson	4.2	Yamaha	2.3
Honda	2.7		
Kawasaki	2.6		
KTM	2.9		
Piaggio Group	2.8		
Suzuki	3.1	AVERAGE	2.6

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

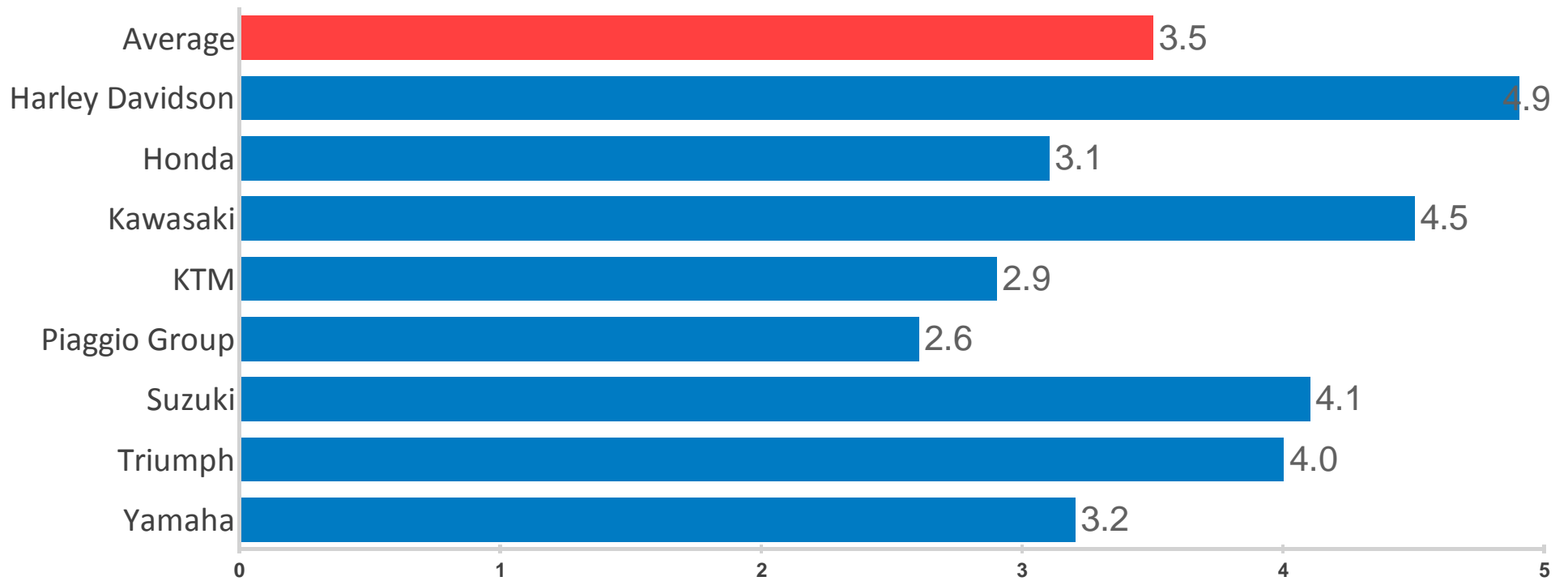


PREVIOUS SURVEY RESULTS – SPRING 2018

16a: That the management of your manufacturer takes dealers' views and opinions into account			
		Triumph	2.3
Harley Davidson	4.2	Yamaha	2.7
Honda	3.0		
Kawasaki	3.3		
KTM	3.3		
Piaggio Group	3.3		
Suzuki	3.5	AVERAGE	3.0

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY

Q16 b) The effectiveness of the field sales team

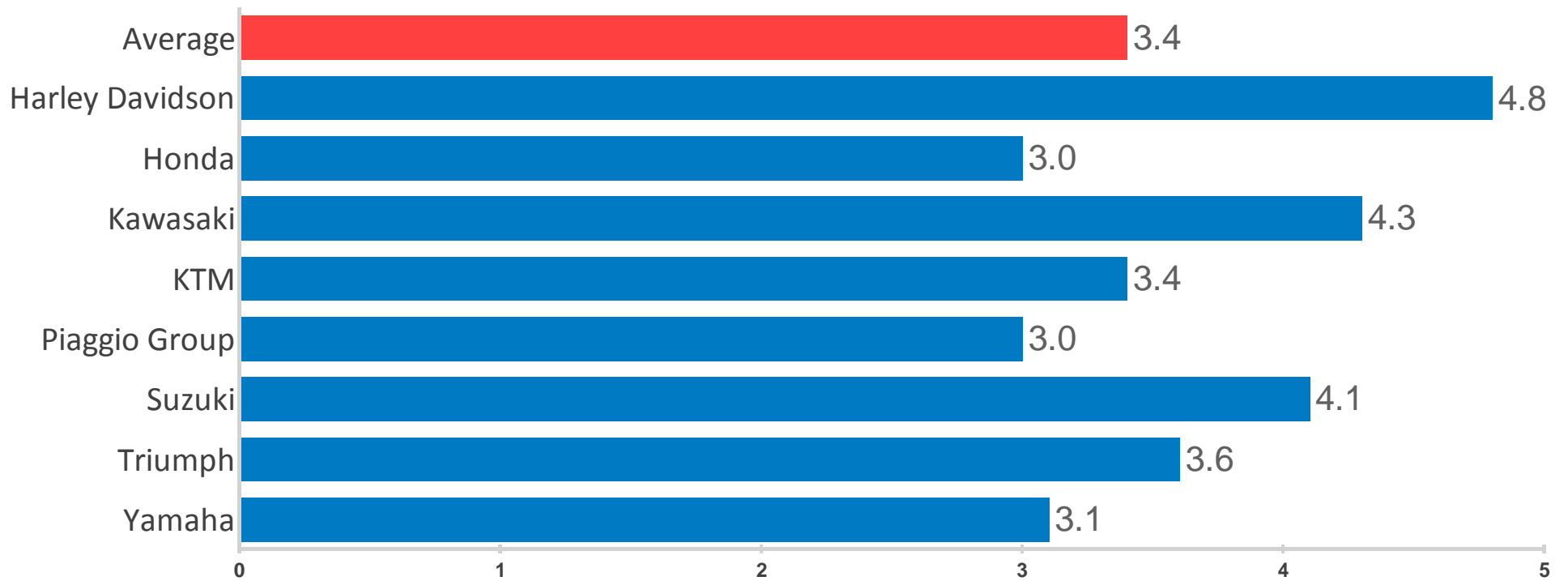


PREVIOUS SURVEY RESULTS – SPRING 2018

16b: The effectiveness of your field sales team			
		Triumph	3.9
Harley Davidson	4.2	Yamaha	3.6
Honda	3.1		
Kawasaki	4.2		
KTM	2.9		
Piaggio Group	3.4		
Suzuki	3.6	AVERAGE	3.6

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY

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

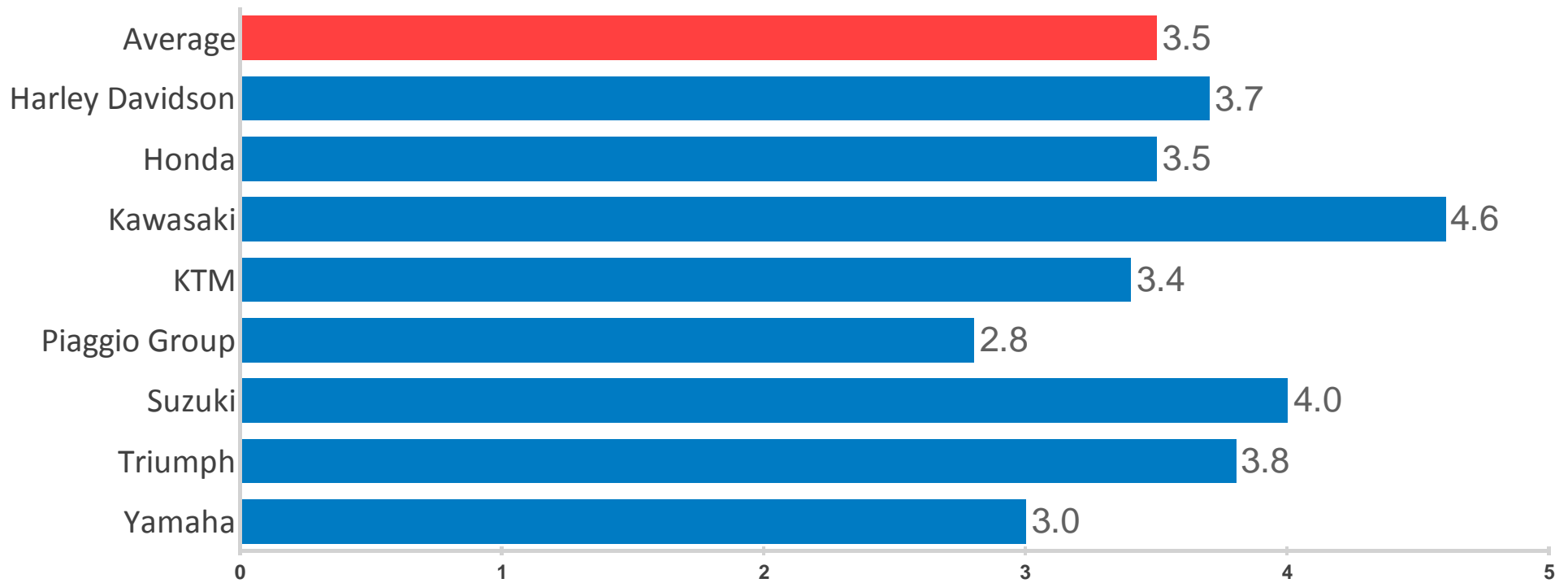


PREVIOUS SURVEY RESULTS – SPRING 2018

16c: The effectiveness of the field service and parts staff			
		Triumph	3.5
Harley Davidson	4.0	Yamaha	3.4
Honda	2.8		
Kawasaki	3.9		
KTM	3.4		
Piaggio Group	3.5		
Suzuki	3.8	AVERAGE	3.4

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY

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

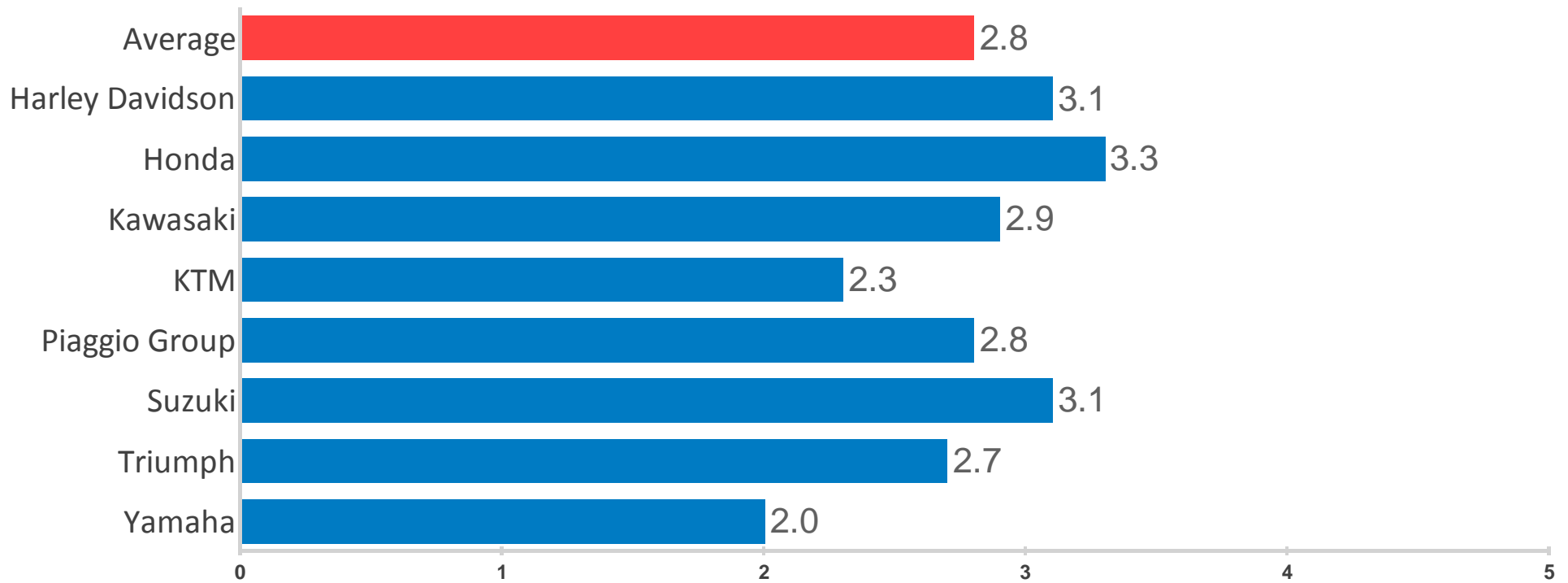


PREVIOUS SURVEY RESULTS – SPRING 2018

16d: The effectiveness of your manufacturer's retail finance programme			
		Triumph	3.1
Harley Davidson	4.0	Yamaha	3.0
Honda	3.5		
Kawasaki	4.2		
KTM	3.5		
Piaggio Group	3.4		
Suzuki	4.2	AVERAGE	3.5

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY

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

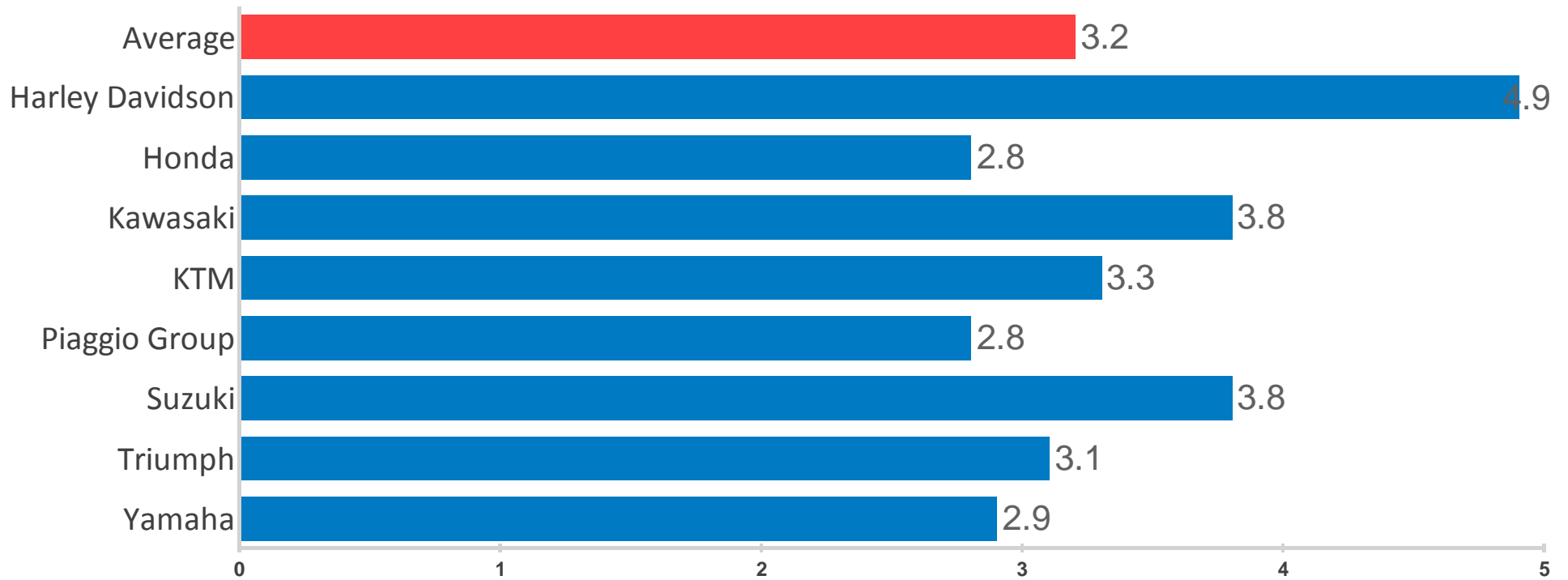


PREVIOUS SURVEY RESULTS – SPRING 2018

16e: The effectiveness of your dealer council and dealer forums			
		Triumph	1.9
Harley Davidson	3.3	Yamaha	2.2
Honda	3.0		
Kawasaki	3.1		
KTM	2.4		
Piaggio Group	3.5		
Suzuki	2.6	AVERAGE	2.7

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY

Q17 a) The routine procedures and controls expected

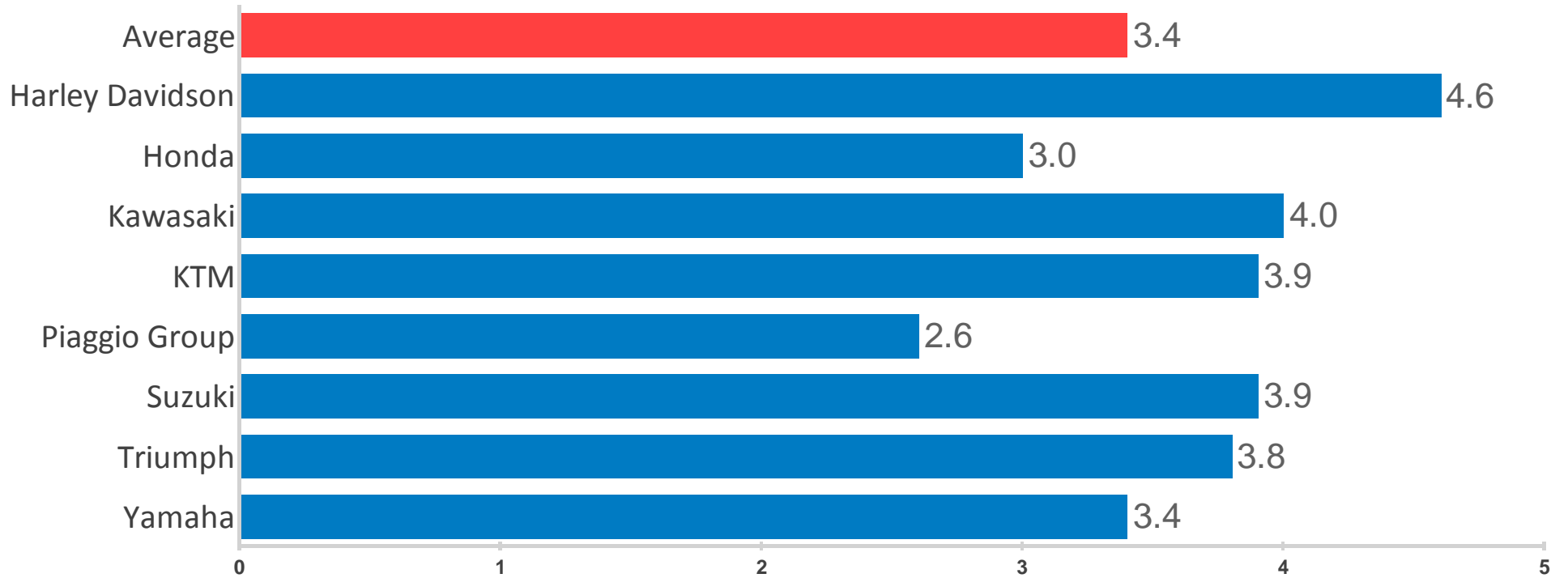


PREVIOUS SURVEY RESULTS – SPRING 2018

17a: The routine procedures and controls expected			
		Triumph	2.9
Harley Davidson	4.4	Yamaha	3.3
Honda	3.2		
Kawasaki	3.1		
KTM	3.5		
Piaggio Group	3.2		
Suzuki	3.5	AVERAGE	3.3

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY

Q17 b) The quality of your manufacturer's training

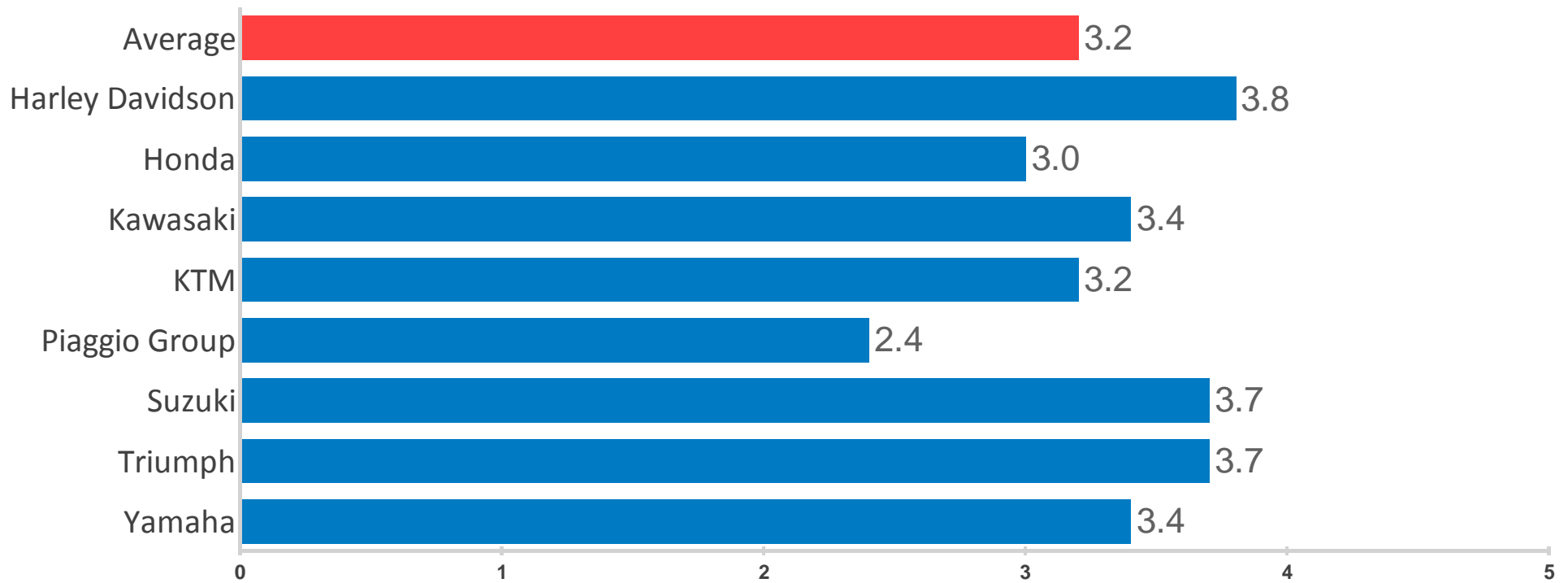


PREVIOUS SURVEY RESULTS – SPRING 2018

17b: The quality of your manufacturer's training			
		Triumph	3.6
Harley Davidson	4.0	Yamaha	3.8
Honda	3.2		
Kawasaki	3.7		
KTM	4.1		
Piaggio Group	3.3		
Suzuki	3.8	AVERAGE	3.6

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY

Q17 c) The cost of your manufacturer's training

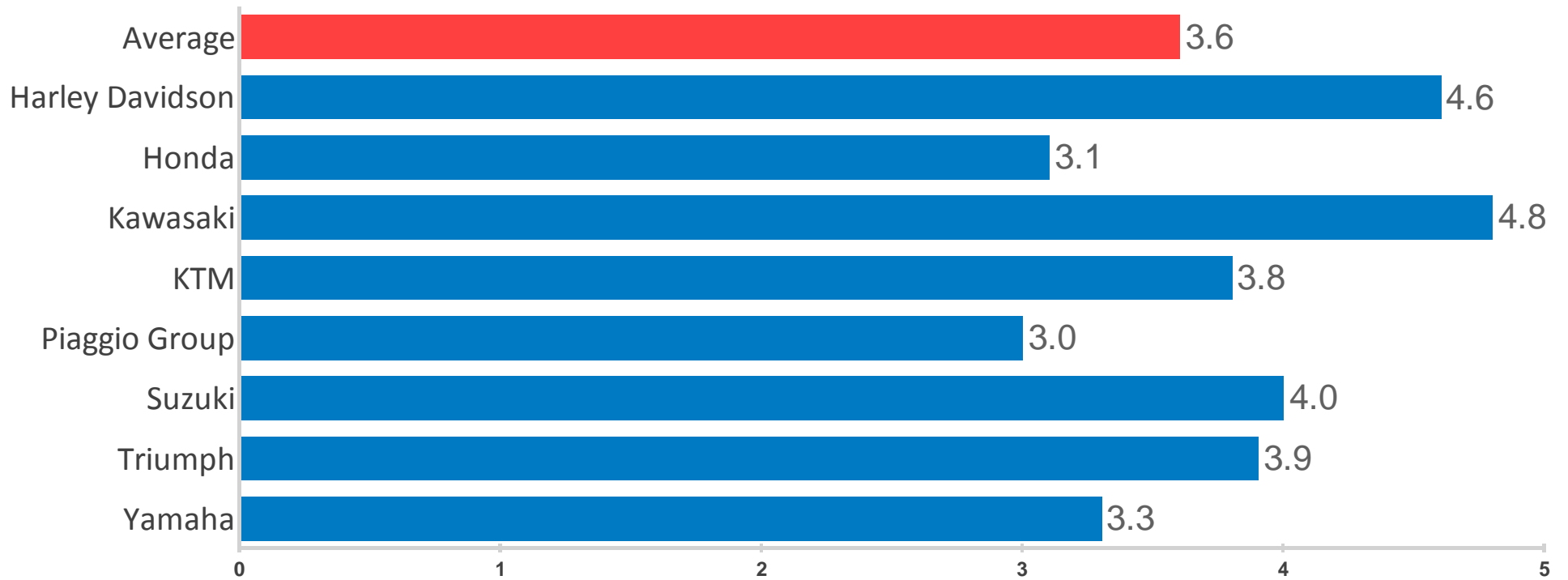


PREVIOUS SURVEY RESULTS – SPRING 2018

17c: The cost of your manufacturer's training			
		Triumph	3.4
Harley Davidson	3.6	Yamaha	3.3
Honda	3.1		
Kawasaki	3.0		
KTM	3.1		
Piaggio Group	3.1		
Suzuki	3.5	AVERAGE	3.2

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY

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

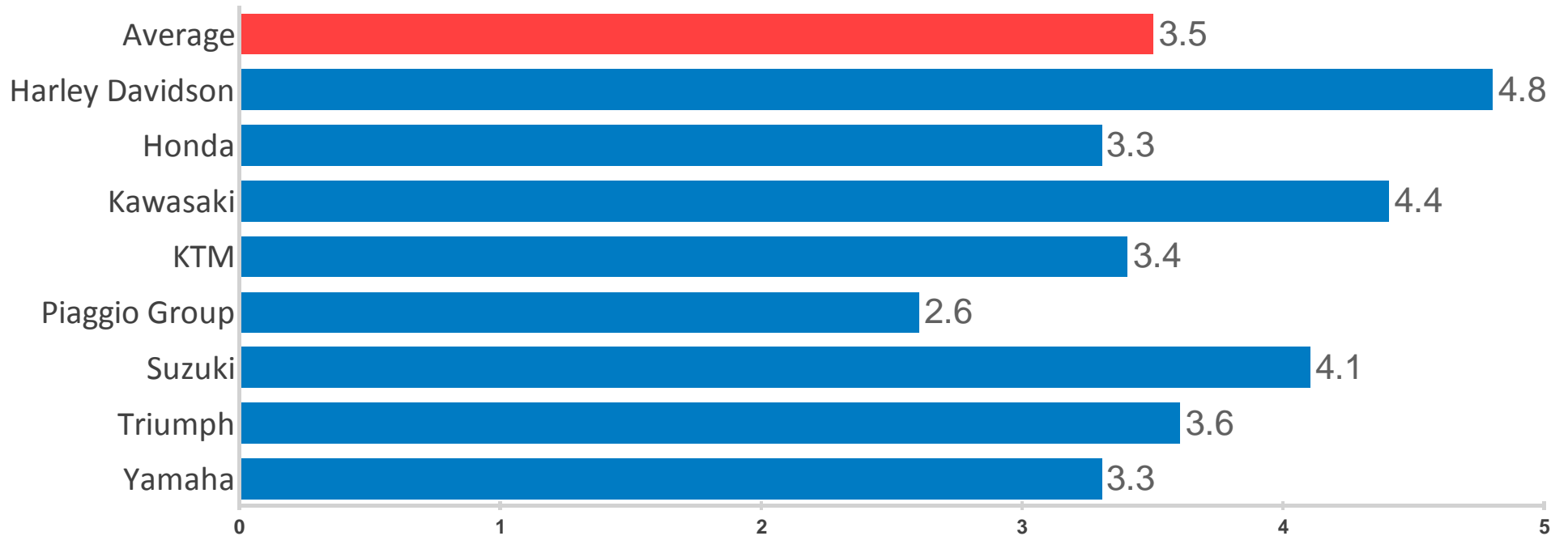


PREVIOUS SURVEY RESULTS – SPRING 2018

17d: Your ability to do business with your manufacturer on a day-to-day basis			
		Triumph	3.3
Harley Davidson	4.4	Yamaha	3.5
Honda	3.1		
Kawasaki	3.9		
KTM	3.8		
Piaggio Group	3.2		
Suzuki	3.8	AVERAGE	3.5

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY

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

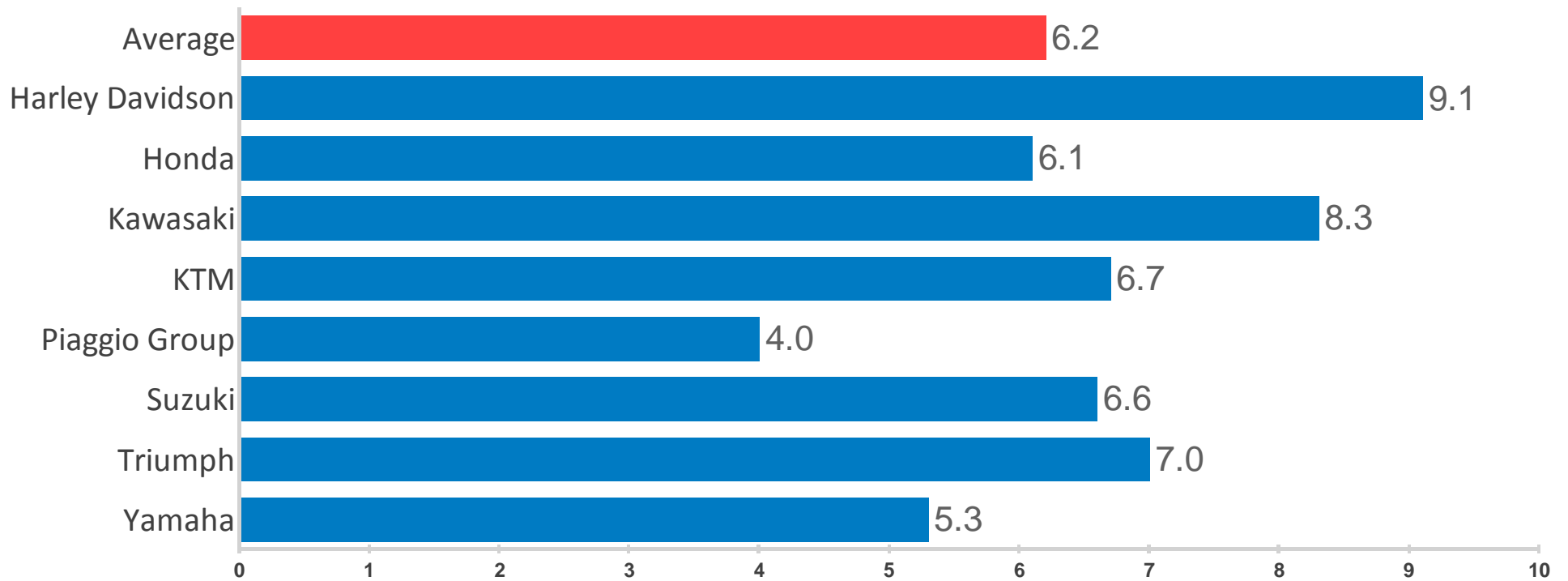


PREVIOUS SURVEY RESULTS – SPRING 2018

17e: The support and assistance provided by your manufacturer to enable you to follow a professional sales process			
		Triumph	3.2
Harley Davidson	4.4	Yamaha	3.5
Honda	3.5		
Kawasaki	3.6		
KTM	3.6		
Piaggio Group	3.2		
Suzuki	3.7	AVERAGE	3.5

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY

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



PREVIOUS SURVEY RESULTS – SPRING 2018

18: Overall, how do you rate the value of holding your motorcycle franchise			
		Triumph	6.5
Harley Davidson	9.4	Yamaha	6.0
Honda	6.4		
Kawasaki	7.4		
KTM	7.6		
Piaggio Group	5.1		
Suzuki	5.5	AVERAGE	6.3

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 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			
Kawasaki	4.4	Piaggio Group	2.7	Harley Davidson	4.1	KTM	2.3
Harley Davidson	4.1			Kawasaki	3.6		
KTM	3.6			Suzuki	3.3		
Suzuki	3.6			Triumph	2.9		
Triumph	3.6			Piaggio Group			
Honda	3.3			Honda	2.7		
Yamaha	3.1	Average	3.4	Yamaha	2.6	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	Triumph	2.7	Harley Davidson	4.1	KTM	2.3
Kawasaki	4.0			Suzuki	3.7		
Suzuki	3.6			Kawasaki	3.3		
KTM	3.4			Honda	2.6		
Yamaha	3.2			Yamaha	2.6		
Honda	3.1			Piaggio Group	2.4		
Piaggio Group	2.7	Average	3.2	Triumph	2.4	Average	2.8

7c: What is your annual target for this brand				8a: The brand image			
Honda	292.5	Suzuki	72.2	Harley Davidson	4.9	Piaggio Group	2.8
KTM	288.2			KTM	4.7		
Harley Davidson	188.8			Triumph	4.6		
Triumph	175.4			Kawasaki	4.4		
Piaggio Group	168.9			Yamaha	3.8		
Yamaha	161.5			Honda	3.7		
Kawasaki	110.5	Average	190.2	Suzuki	3.6	Average	3.9

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY

8b: The product image				8c: Frequency of introduction of new models			
KTM	4.7	Piaggio Group	2.8	Harley Davidson	4.6	Piaggio Group	2.0
Harley Davidson	4.4			Kawasaki	4.6		
Kawasaki	4.4			KTM	4.3		
Triumph	4.4			Triumph	4.3		
Yamaha	3.8			Honda	3.5		
Honda	3.7			Yamaha	3.5		
Suzuki	3.5	Average	3.8	Suzuki	2.5	Average	3.4

8d: Retail sales incentives and promotions				8e: Product advertising			
Kawasaki	4.3	Piaggio Group	2.2	Kawasaki	4.2	Piaggio Group	1.6
Suzuki	4.0			Harley Davidson	4.1		
Triumph	3.8			Triumph	4.1		
Harley Davidson	3.6			Suzuki	3.9		
KTM	3.3			KTM	3.6		
Honda	3.1			Yamaha	3.1		
Yamaha	3.0	Average	3.3	Honda	2.7	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	4.9	Honda	2.2	Harley Davidson	4.7	Honda	1.7
KTM	4.7			KTM	4.4		
Triumph	4.5			Suzuki	3.4		
Kawasaki	3.7			Kawasaki	3.0		
Yamaha	3.7			Yamaha	3.0		
Suzuki	3.5			Triumph	2.8		
Piaggio Group	2.7	Average	3.4	Piaggio Group	2.0	Average	2.7

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY

9: Your manufacturer's warranty policy				10: What is your labour rate for retail before VAT (£)			
Kawasaki	4.5	Honda	3.1	Harley Davidson	78.3	KTM	48.8
Suzuki	4.0			Triumph	62.6		
Triumph	4.0			Piaggio Group	61.2		
Yamaha	4.0			Yamaha	58.9		
Piaggio Group	3.6			Kawasaki	54.3		
Harley Davidson	3.4			Honda	54.2		
Honda	3.4	Average	3.7	Suzuki	51.3	Average	57.8

11: What is your labour rate for warranty before VAT (£)				12a: Warranty labour rate			
Harley Davidson	77.6	KTM	36.6	Harley Davidson	4.9	Yamaha	2.3
Kawasaki	55.3			Kawasaki	4.5		
Triumph	53.1			Triumph	3.4		
Piaggio Group	46.7			Piaggio Group	3.2		
Honda	46.6			Suzuki	3.0		
Yamaha	41.8			KTM	2.9		
Suzuki	40.7	Average	47.6	Honda	2.7	Average	3.1

12b: Warranty replacement parts policy				12c: Warranty time allowances			
Kawasaki	3.5	Triumph	2.1	Kawasaki	4.2	Piaggio Group	3.0
Harley Davidson	3.3			Yamaha	4.1		
Suzuki	3.0			Suzuki	3.9		
KTM	2.6			Triumph	3.8		
Honda	2.5			Harley Davidson	3.4		
Piaggio Group	2.5			Honda	3.4		
Yamaha	2.4	Average	2.6	KTM	3.4	Average	3.6

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY

12d: Timely and fair settlement of warranty claims				12e: Quality and availability of technical support			
Kawasaki	4.6	Piaggio Group	3.0	Kawasaki	4.5	Harley Davidson	2.9
Harley Davidson	4.4			Suzuki	4.1		
Yamaha	4.2			KTM	3.8		
Suzuki	4.1			Triumph	3.8		
Triumph	4.0			Yamaha	3.6		
Honda	3.5			Piaggio Group	3.1		
KTM	3.3	Average	3.8	Honda	3.0	Average	3.5

13: The profit return by representing your franchise				14a: The future profitability of your business			
Harley Davidson	3.8	Yamaha	2.4	Harley Davidson	4.3	Piaggio Group	2.4
Kawasaki	3.6			KTM	3.6		
Triumph	3.3			Kawasaki	3.5		
Suzuki	3.0			Triumph	3.4		
KTM	2.7			Suzuki	3.1		
Honda	2.5			Honda	2.8		
Piaggio Group	2.4	Average	2.8	Yamaha	2.6	Average	3.0

14b: Your stocking plan for this franchise				15a: The dealer standards expected by your manufacturer			
Harley Davidson	4.1	Triumph	2.6	Harley Davidson	4.3	Yamaha	2.2
Kawasaki	4.1			Suzuki	3.6		
KTM	3.4			KTM	3.1		
Suzuki	3.4			Kawasaki	2.9		
Honda	3.2			Honda	2.8		
Piaggio Group	2.7			Piaggio Group	2.7		
Yamaha	2.7	Average	3.1	Triumph	2.4	Average	2.9

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 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	Yamaha	2.0	Harley Davidson	4.2	Yamaha	2.3
Suzuki	3.2			Kawasaki	3.9		
Kawasaki	2.9			Suzuki	3.7		
KTM	2.8			Honda	3.1		
Honda	2.5			Triumph	2.7		
Piaggio Group	2.5			Piaggio Group	2.6		
Triumph	2.1	Average	2.6	KTM	2.4	Average	3.0

16b: The effectiveness of your field sales team				16c: The effectiveness of the field service and parts staff			
Harley Davidson	4.9	Piaggio Group	2.6	Harley Davidson	4.8	Piaggio Group	3.0
Kawasaki	4.5			Kawasaki	4.3		
Suzuki	4.1			Suzuki	4.1		
Triumph	4.0			Triumph	3.6		
Yamaha	3.2			KTM	3.4		
Honda	3.1			Yamaha	3.1		
KTM	2.9	Average	3.5	Honda	3.0	Average	3.4

16d: The effectiveness of your manufacturer's retail finance programme				16e: The effectiveness of your dealer council and dealer forums			
Kawasaki	4.6			Honda	3.3	Yamaha	2.0
Suzuki	4.0	Piaggio Group	2.8	Harley Davidson	3.1		
Triumph	3.8			Suzuki	3.1		
Harley Davidson	3.7			Kawasaki	2.9		
Honda	3.5			Piaggio Group	2.8		
KTM	3.4			Triumph	2.7		
Yamaha	3.0	Average	3.5	KTM	2.3	Average	2.8

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE AUTUMN 2018 SURVEY

17a: The routine procedures and controls expected				17b: The quality of your manufacturer's training			
Harley Davidson	4.9	Piaggio Group	2.8	Harley Davidson	4.6	Piaggio Group	2.6
Kawasaki	3.8			Kawasaki	4.0		
Suzuki	3.8			KTM	3.9		
KTM	3.3			Suzuki	3.9		
Triumph	3.1			Triumph	3.8		
Yamaha	2.9			Yamaha	3.4		
Honda	2.8	Average	3.2	Honda	3.0	Average	3.4

17c: The cost of your manufacturer's training				17d: Your ability to do business with your manufacturer on a day-to-day basis			
Harley Davidson	3.8	Piaggio Group	2.4	Kawasaki	4.8	Piaggio Group	3.0
Suzuki	3.7			Harley Davidson	4.6		
Triumph	3.7			Suzuki	4.0		
Kawasaki	3.4			Triumph	3.9		
Yamaha	3.4			KTM	3.8		
KTM	3.2			Yamaha	3.3		
Honda	3.0	Average	3.2	Honda	3.1	Average	3.6

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	Piaggio Group	2.6	Harley Davidson	9.1	Piaggio Group	4.0
Kawasaki	4.4			Kawasaki	8.3		
Suzuki	4.1			Triumph	7.0		
Triumph	3.6			KTM	6.7		
KTM	3.4			Suzuki	6.6		
Honda	3.3			Honda	6.1		
Yamaha	3.3	Average	3.5	Yamaha	5.3	Average	6.2