

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2016 SURVEY



NATIONAL MOTORCYCLE DEALERS ASSOCIATION

DEALER ATTITUDE SURVEY RESULTS

SPRING 2016

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NATIONAL MOTORCYCLE DEALERS ASSOCIATION

DEALER ATTITUDE SURVEY SPRING 2016

We are pleased to reveal the findings of the latest Motorcycle Dealer Attitude Survey conducted in April 2016 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.

The charts on the following pages set out the views from dealers in ten networks. Each rating reflects the consensus view based on responses from typically one in four dealers.

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 2016

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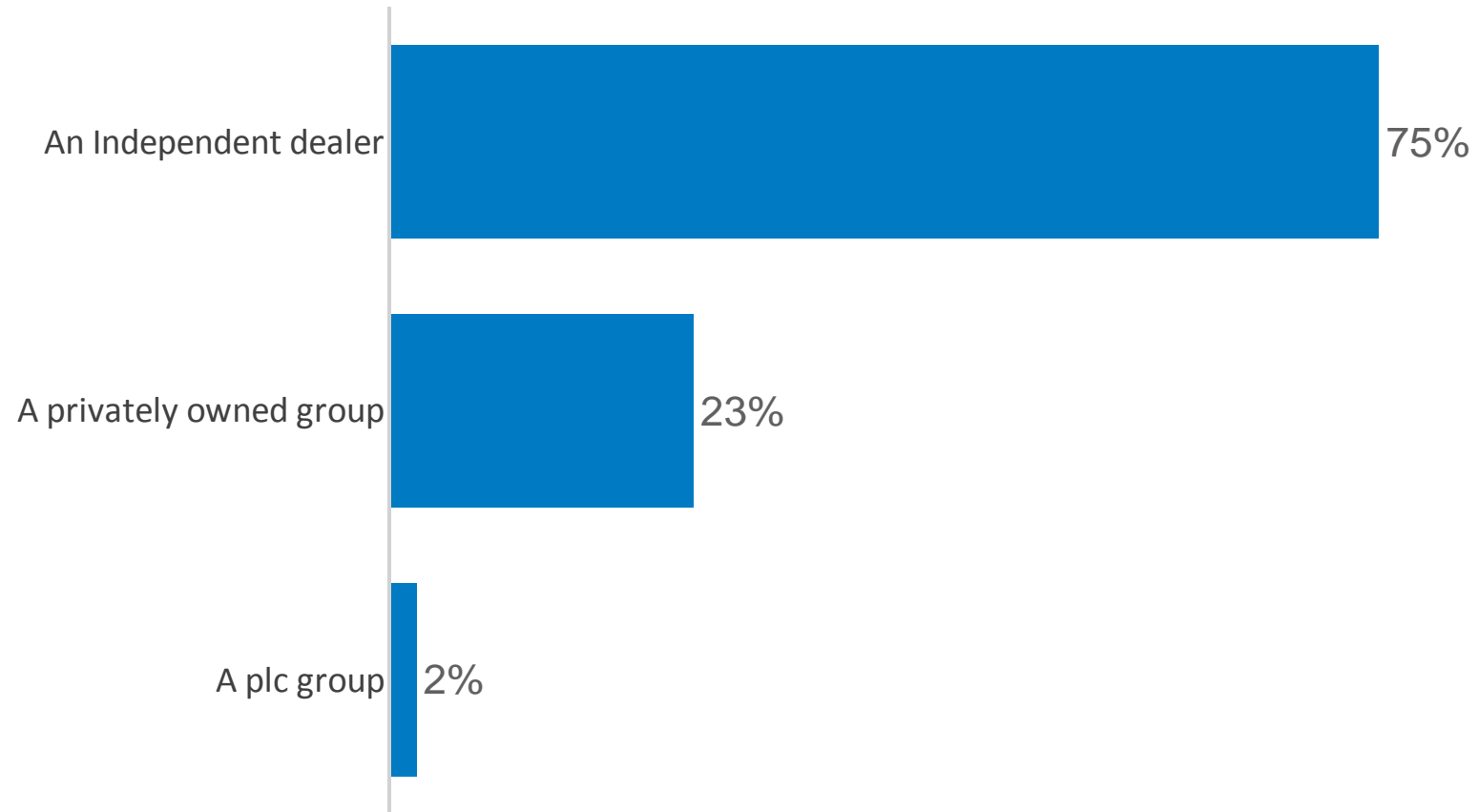
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BREAKDOWN OF RESPONSES

FRANCHISE	NUMBER OF RESPONDENTS	TOTAL NETWORK SIZE	RESPONSE RATE %
BMW	25	36	69
DUCATI	12	31	39
HARLEY DAVIDSON	4	28	14
HONDA	43	65	66
KAWASAKI	17	59	29
KTM	8	35	23
KYMCO	8	104	8
LEXMOTO	8	118	7
PIAGGIO GROUP	18	76	24
SUZUKI	20	83	24
TRIUMPH	12	49	24
YAMAHA	27	119	23
TOTAL	202	803	25

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Q2 In this site are you:

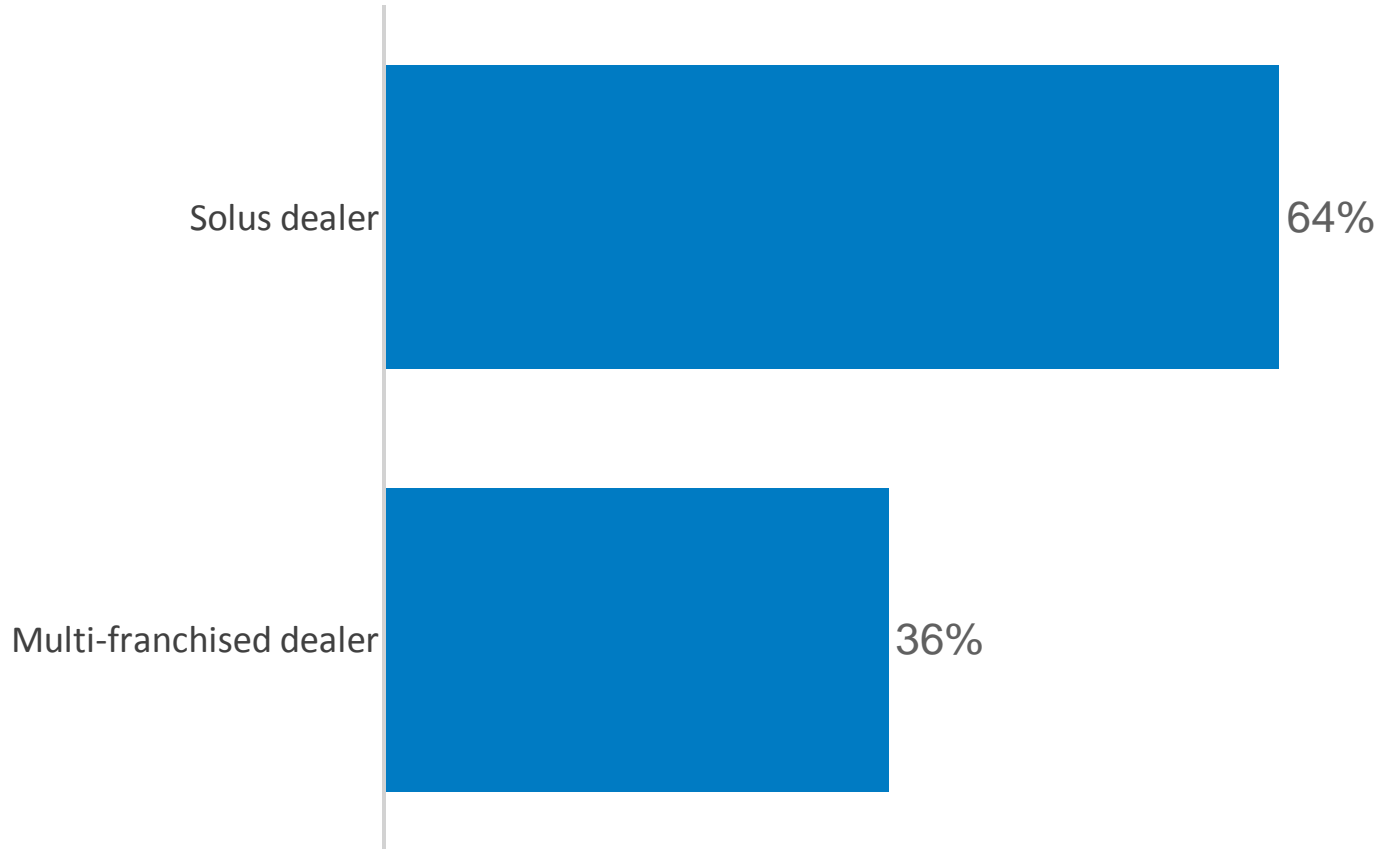


AUTUMN 2015 SURVEY RESULTS

INDEPENDENT	83%
PRIVATELY OWNED	17%
PLC GROUP	0%

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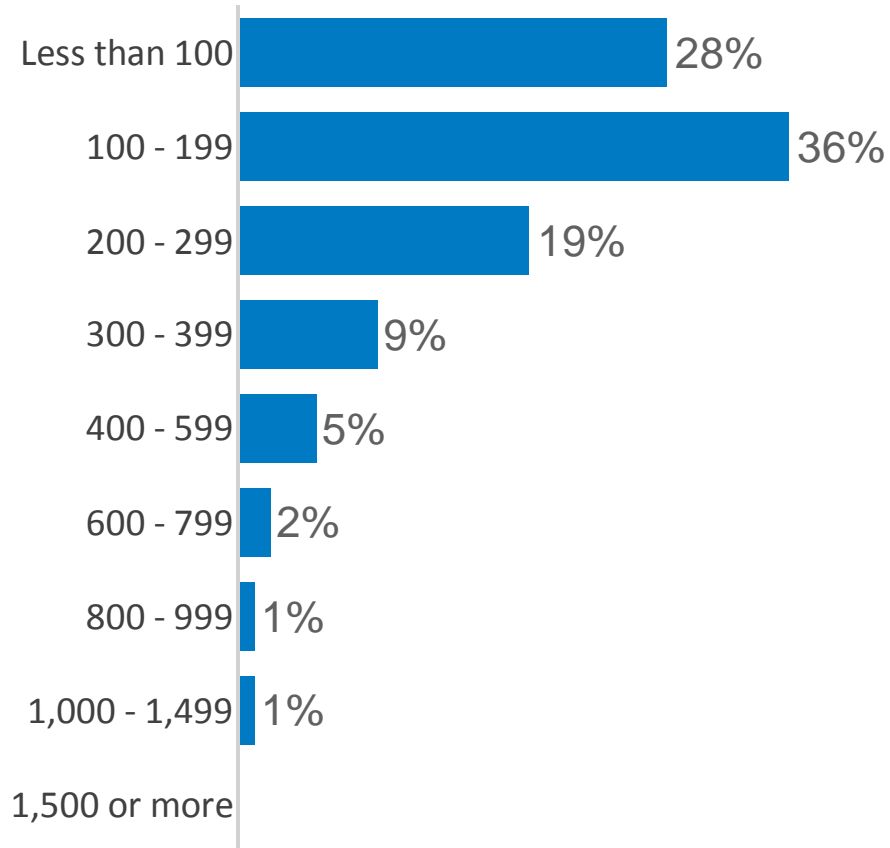
Q3 Is this site:



AUTUMN 2015 SURVEY RESULTS	
SOLUS	64%
MULTI-FRANCHISED	36%

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Q4 How many new motorcycles do you sell per annum?

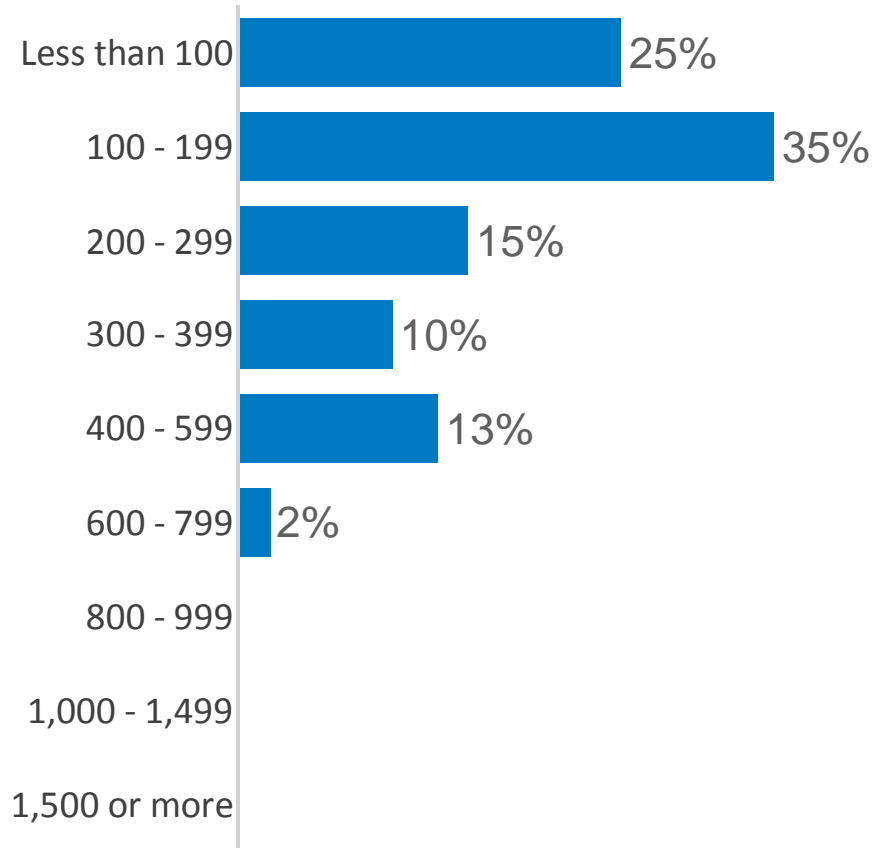


AUTUMN 2015 SURVEY RESULTS

Less than 100	33%	400 – 599	2%
100 – 199	36%	600 – 799	2%
200 – 299	20%	800 – 999	0%
300 – 399	7%	1000 – 1499	0%
1500 or more	0%		

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Q5 How many used motorcycles do you sell per annum?

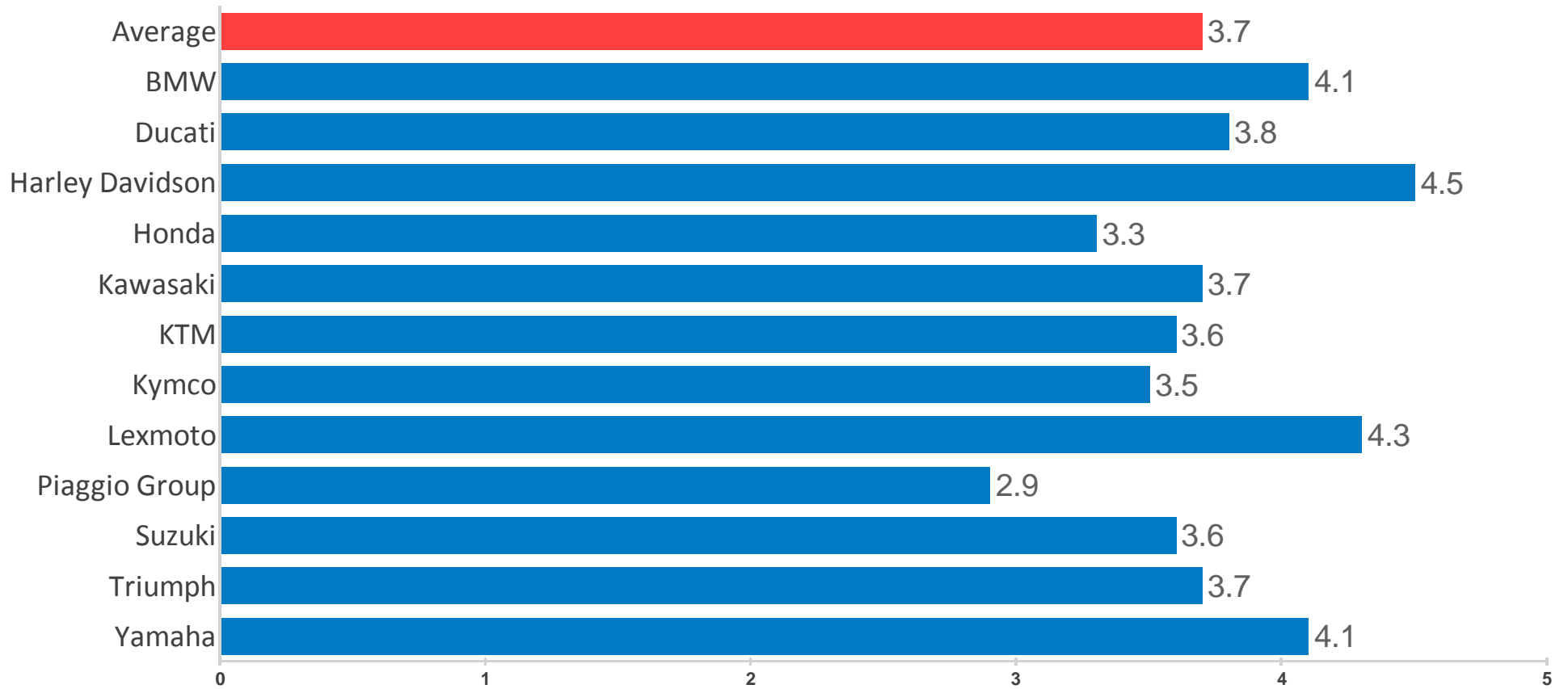


AUTUMN 2015 SURVEY RESULTS

Less than 100	37%	400 – 599	5%
100 – 199	36%	600 – 799	2%
200 – 299	11%	800 – 999	2%
300 – 399	5%	1000 – 1499	1%
1500 or more	0%		

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

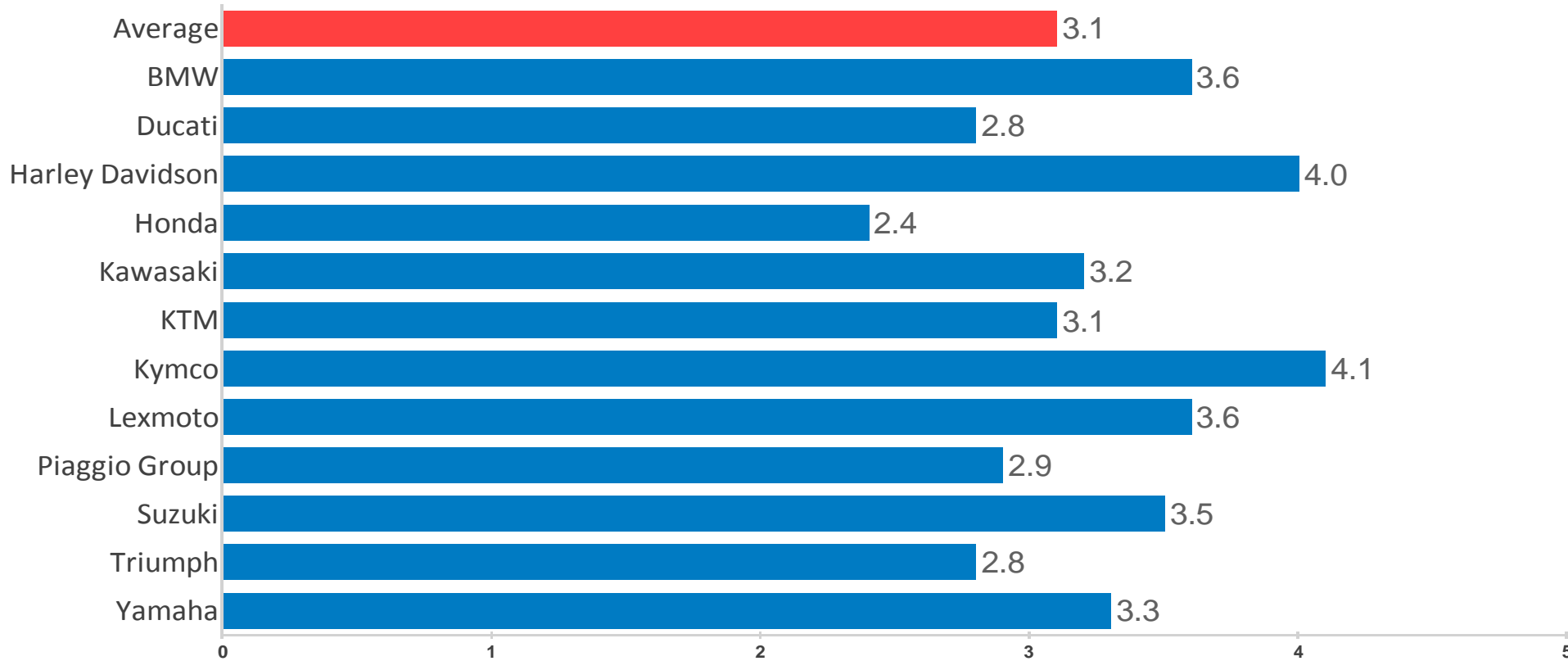


PREVIOUS SURVEY RESULTS – AUTUMN 2015

6a: The product's price and value against other brands			
BMW	4.0	Lexmoto	4.8
Ducati	3.3	Piaggio Group	3.1
Harley Davidson	4.5	Suzuki	3.6
Honda	2.9	Triumph	3.4
Kawasaki	4.1	Yamaha	3.9
KTM	4.2		
Kymco	4.1	AVERAGE	3.6

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2016 SURVEY

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

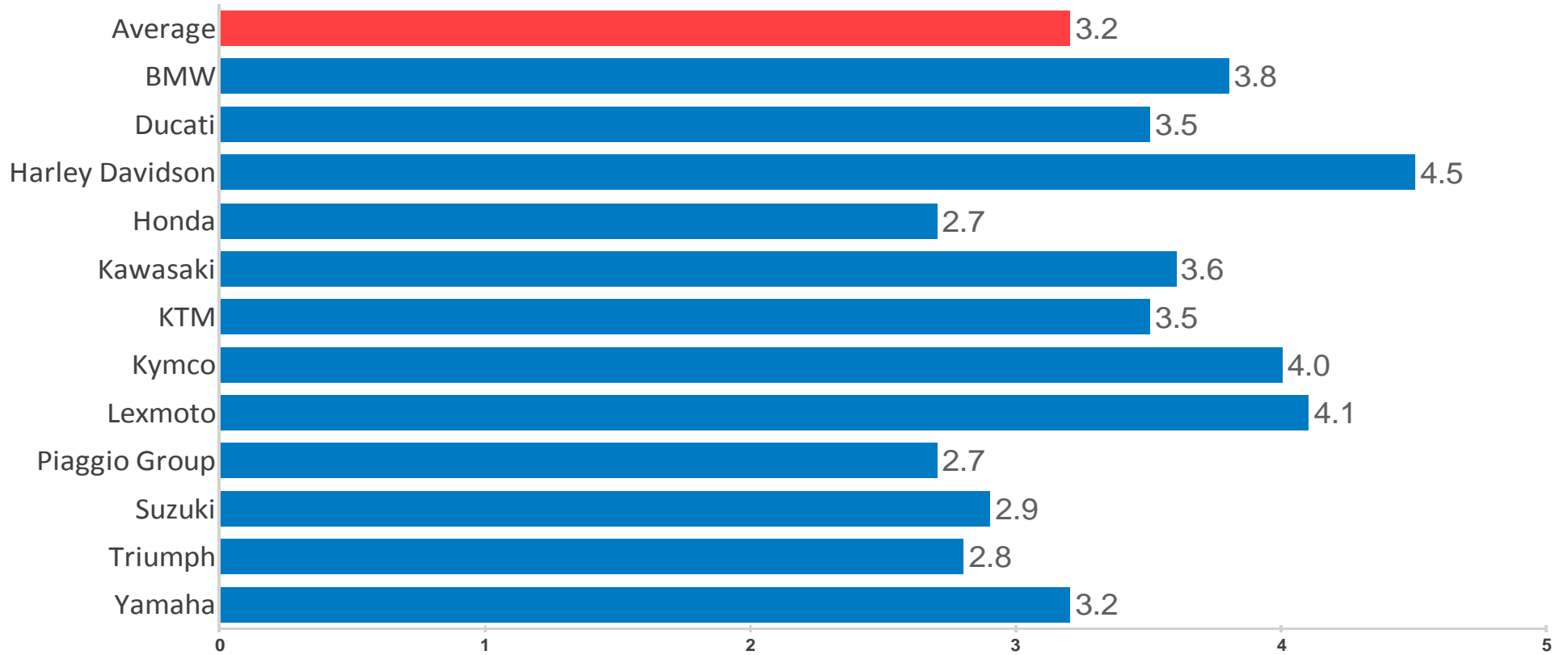


PREVIOUS SURVEY RESULTS – AUTUMN 2015

6b: How realistic is your target and performance related bonus in terms of achievement			
BMW	3.0	Lexmoto	4.5
Ducati	2.7	Piaggio Group	3.0
Harley Davidson	4.3	Suzuki	3.5
Honda	2.4	Triumph	3.0
Kawasaki	3.8	Yamaha	3.5
KTM	3.7		
Kymco	3.7	AVERAGE	3.2

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

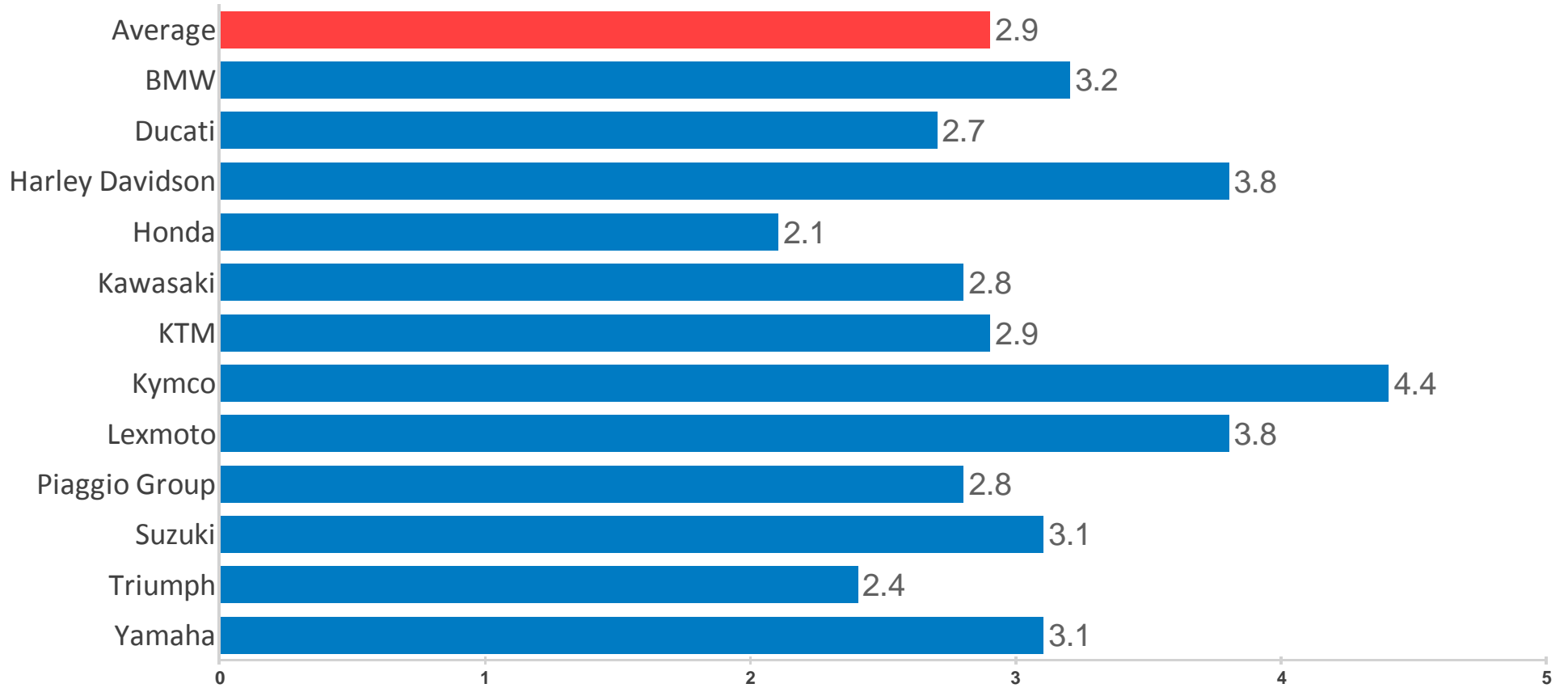


PREVIOUS SURVEY RESULTS – AUTUMN 2015

7a: The fairness of your manufacturer's policy for the supply and stocking of motorcycles			
BMW	3.6	Lexmoto	4.4
Ducati	2.6	Piaggio Group	2.8
Harley Davidson	4.5	Suzuki	3.8
Honda	2.1	Triumph	3.8
Kawasaki	3.7	Yamaha	3.2
KTM	3.6		
Kymco	4.0	AVERAGE	3.2

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Q7 b) The new motorcycle target negotiating process

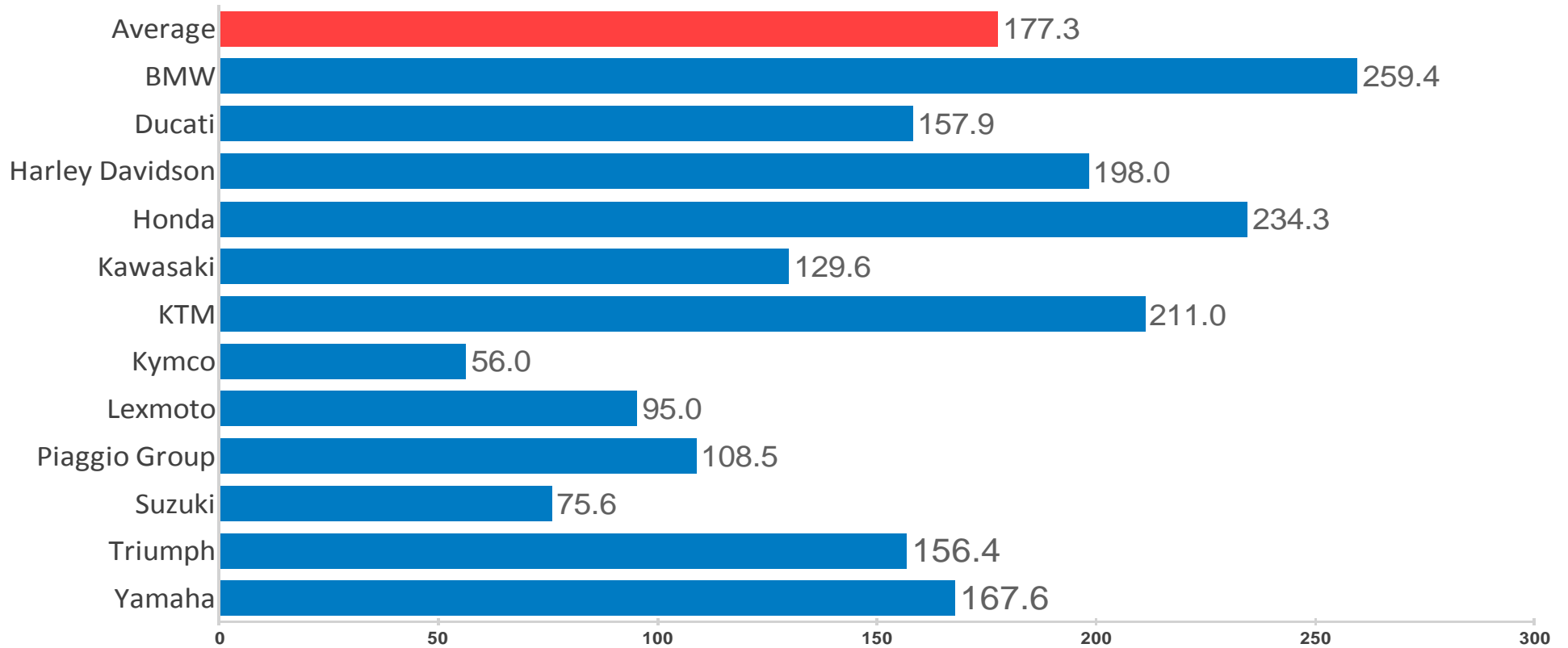


PREVIOUS SURVEY RESULTS – AUTUMN 2015

7b: Your new motorcycle target negotiating process			
BMW	1.8	Lexmoto	4.4
Ducati	3.1	Piaggio Group	2.2
Harley Davidson	4.0	Suzuki	3.5
Honda	1.8	Triumph	2.7
Kawasaki	3.4	Yamaha	2.9
KTM	3.3		
Kymco	3.7	AVERAGE	2.8

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Q7 c) What is your annual target for this brand?

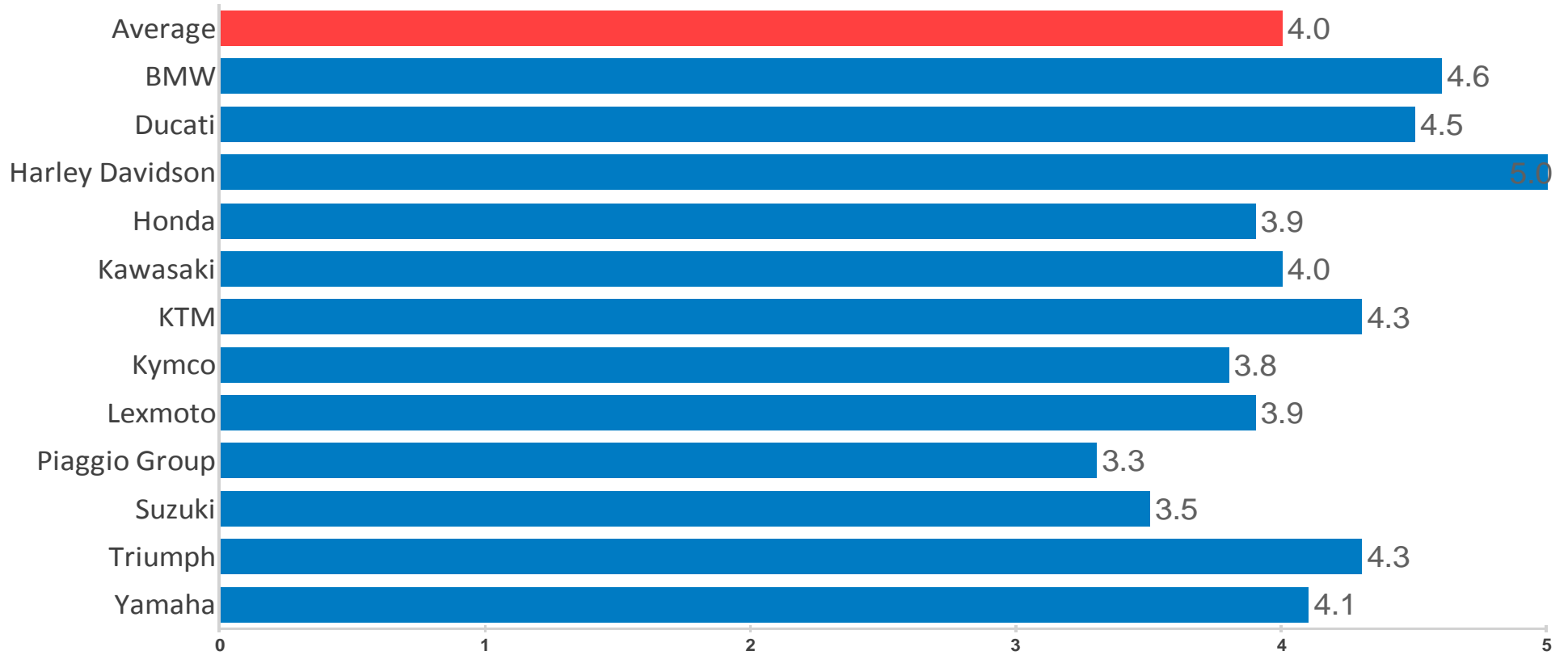


PREVIOUS SURVEY RESULTS – AUTUMN 2015

7c: What is your annual target for this brand			
BMW	200.0	Lexmoto	86.1
Ducati	99.3	Piaggio Group	123.1
Harley Davidson	168.5	Suzuki	68.9
Honda	223.5	Triumph	179.5
Kawasaki	109.3	Yamaha	135.6
KTM	247.0		
Kymco	11.3	AVERAGE	149.0

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Q8 a) The brand image

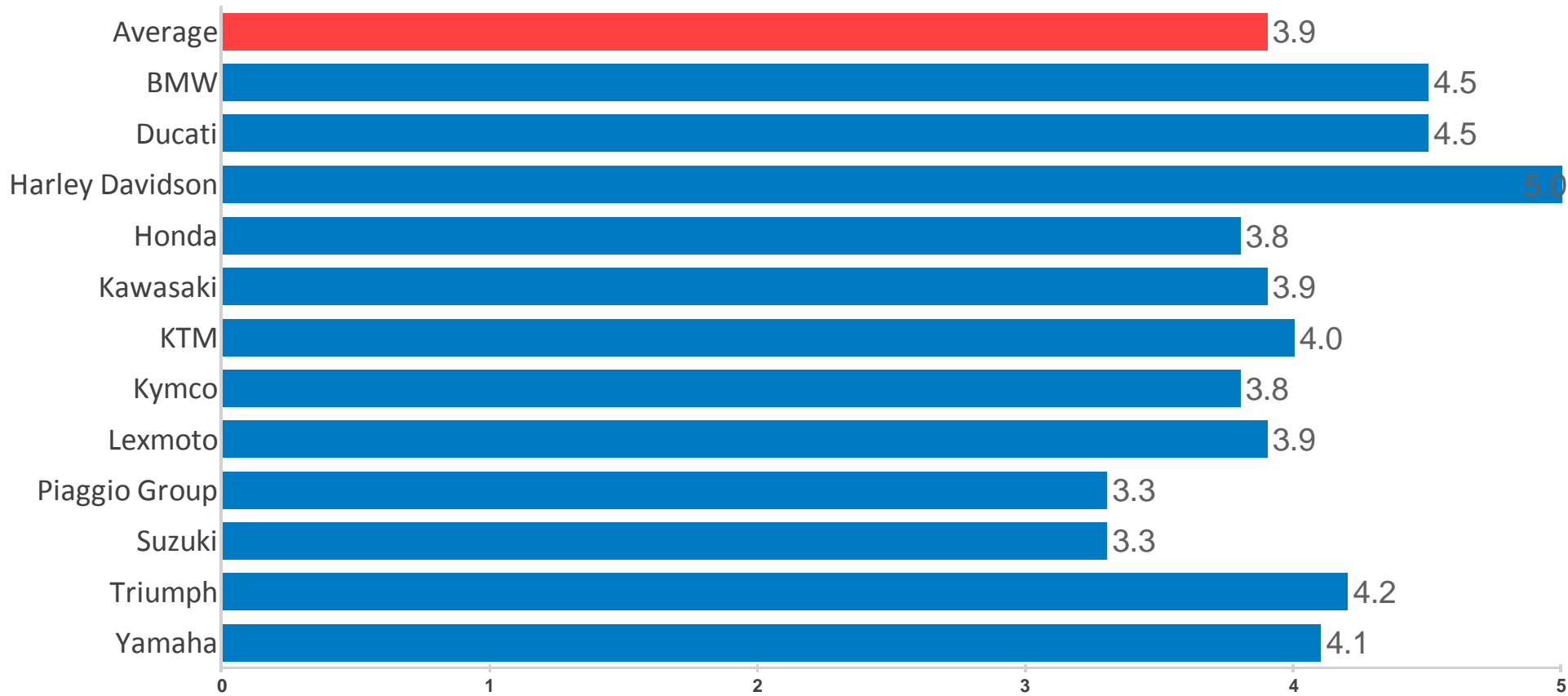


PREVIOUS SURVEY RESULTS – AUTUMN 2015

8a: The brand image			
BMW	3.8	Lexmoto	4.4
Ducati	4.7	Piaggio Group	3.3
Harley Davidson	5.0	Suzuki	3.8
Honda	3.8	Triumph	4.3
Kawasaki	4.1	Yamaha	4.3
KTM	4.7		
Kymco	3.6	AVERAGE	4.0

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2016 SURVEY

Q8 b) The product image

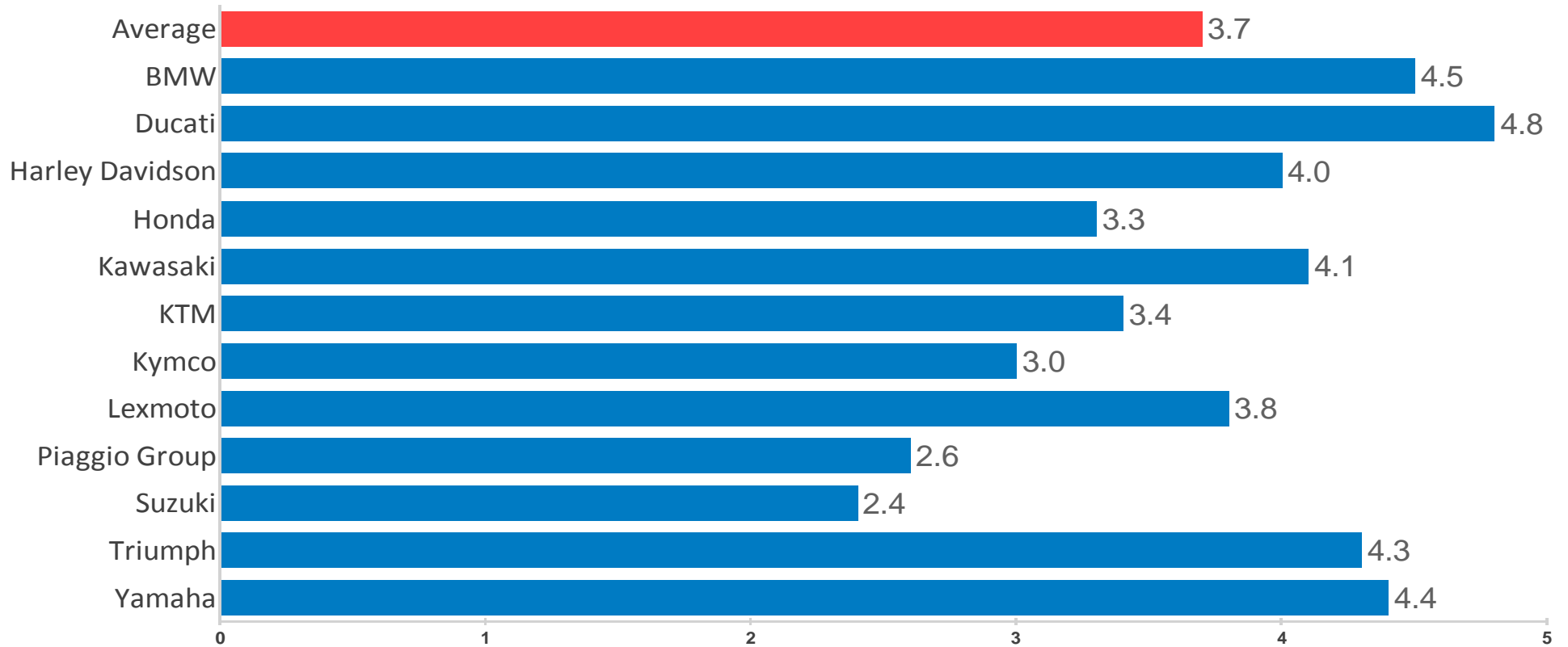


PREVIOUS SURVEY RESULTS – AUTUMN 2015

8b: The product image			
BMW	4.2	Lexmoto	4.5
Ducati	4.6	Piaggio Group	3.6
Harley Davidson	4.8	Suzuki	3.6
Honda	3.5	Triumph	4.3
Kawasaki	4.2	Yamaha	4.3
KTM	4.6		
Kymco	3.6	AVERAGE	3.9

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2016 SURVEY

Q8 c) Frequency of introduction of new models

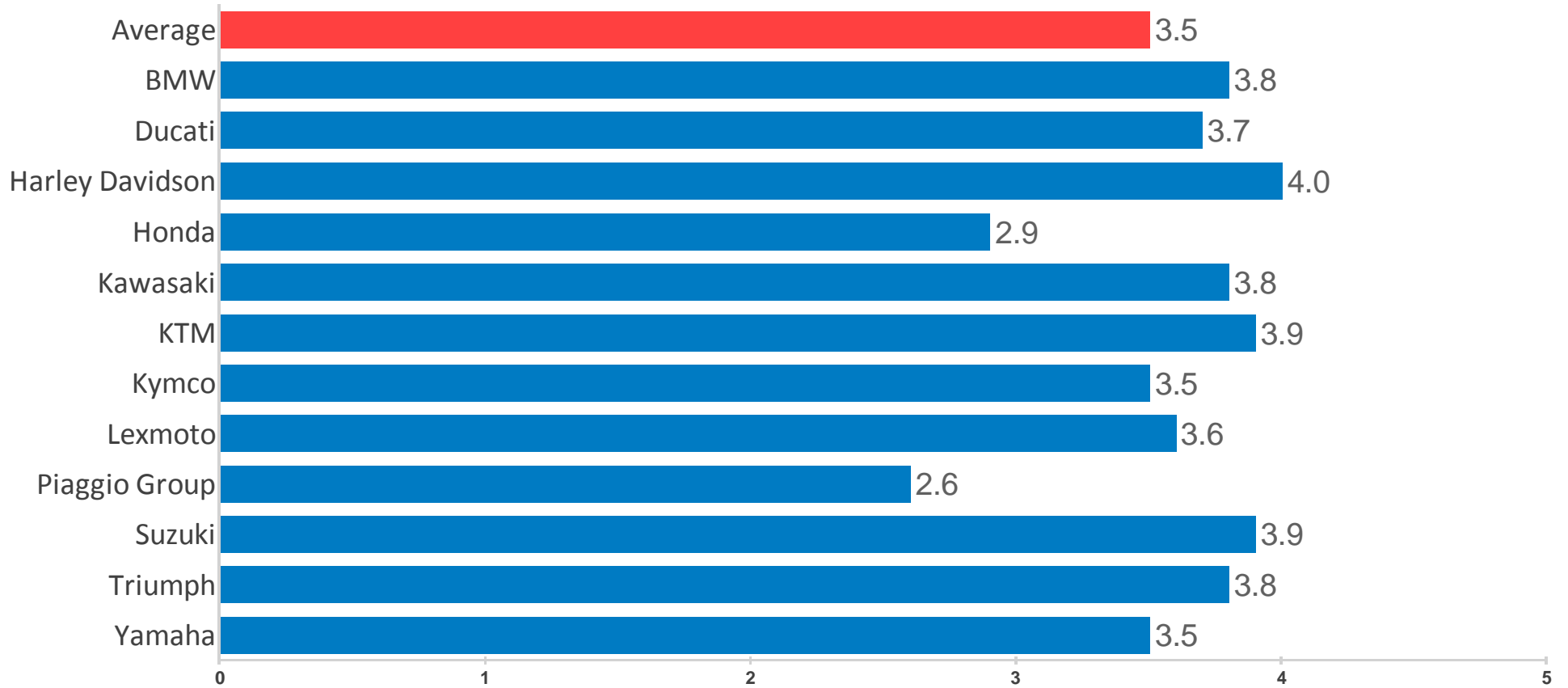


PREVIOUS SURVEY RESULTS – AUTUMN 2015

8c: Frequency of introduction of new models			
BMW	3.8	Lexmoto	4.6
Ducati	4.7	Piaggio Group	2.6
Harley Davidson	4.3	Suzuki	2.6
Honda	2.9	Triumph	3.7
Kawasaki	4.0	Yamaha	4.2
KTM	3.8		
Kymco	3.3	AVERAGE	3.4

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Q8 d) Retail sales incentives and promotions

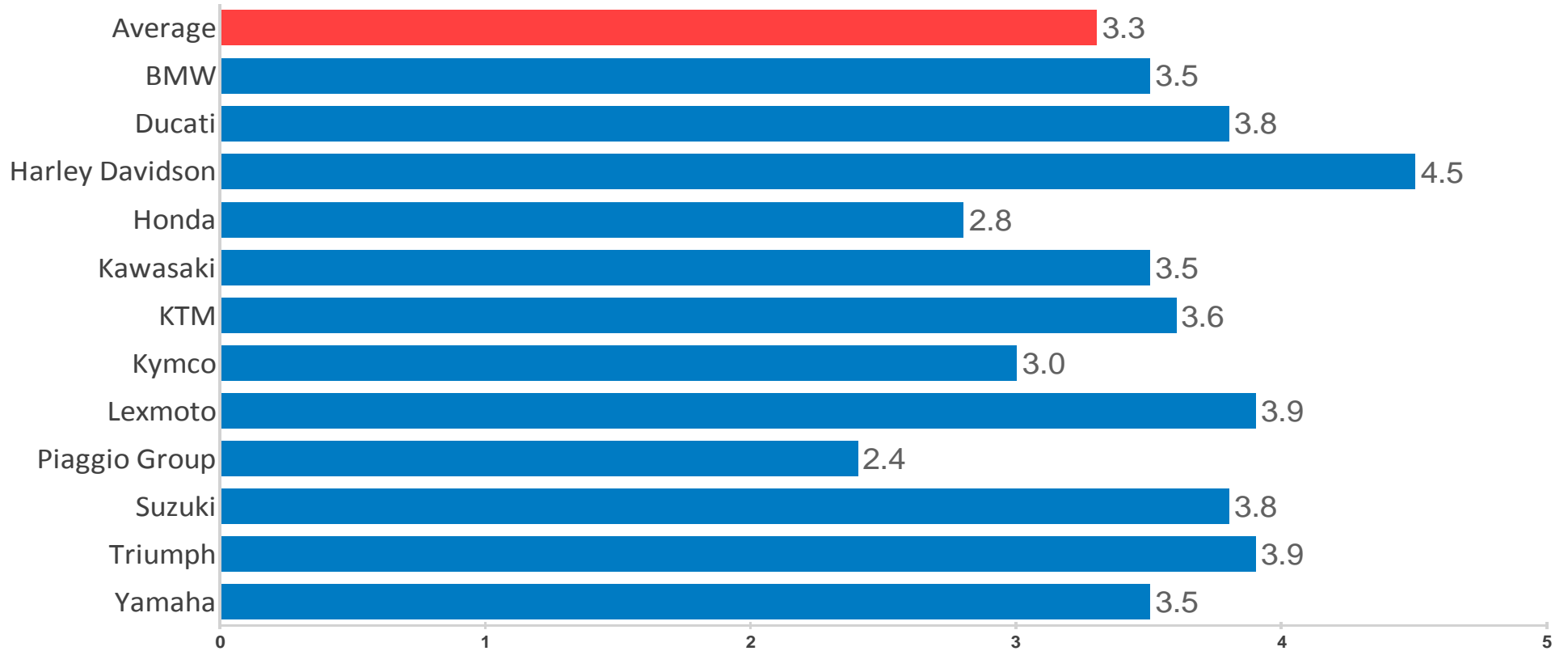


PREVIOUS SURVEY RESULTS – AUTUMN 2015

8d: Retail sales incentives and promotions			
BMW	3.2	Lexmoto	3.9
Ducati	3.0	Piaggio Group	2.4
Harley Davidson	3.8	Suzuki	3.9
Honda	2.6	Triumph	3.4
Kawasaki	4.2	Yamaha	3.9
KTM	4.0		
Kymco	3.4	AVERAGE	3.3

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Q8 e) Product advertising

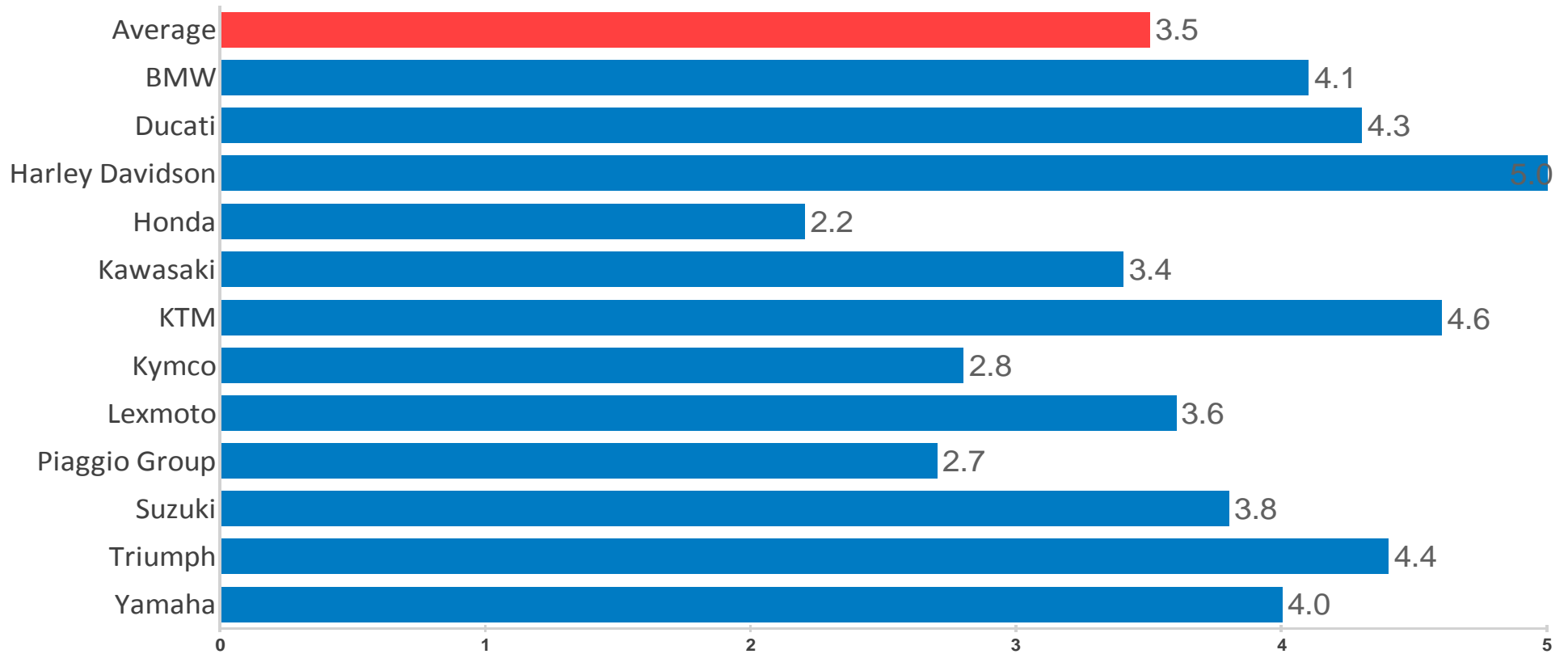


PREVIOUS SURVEY RESULTS – AUTUMN 2015

8e: Product advertising			
BMW	3.0	Lexmoto	3.9
Ducati	3.3	Piaggio Group	2.0
Harley Davidson	3.8	Suzuki	3.8
Honda	2.4	Triumph	3.7
Kawasaki	3.6	Yamaha	3.5
KTM	4.0		
Kymco	3.2	AVERAGE	3.1

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

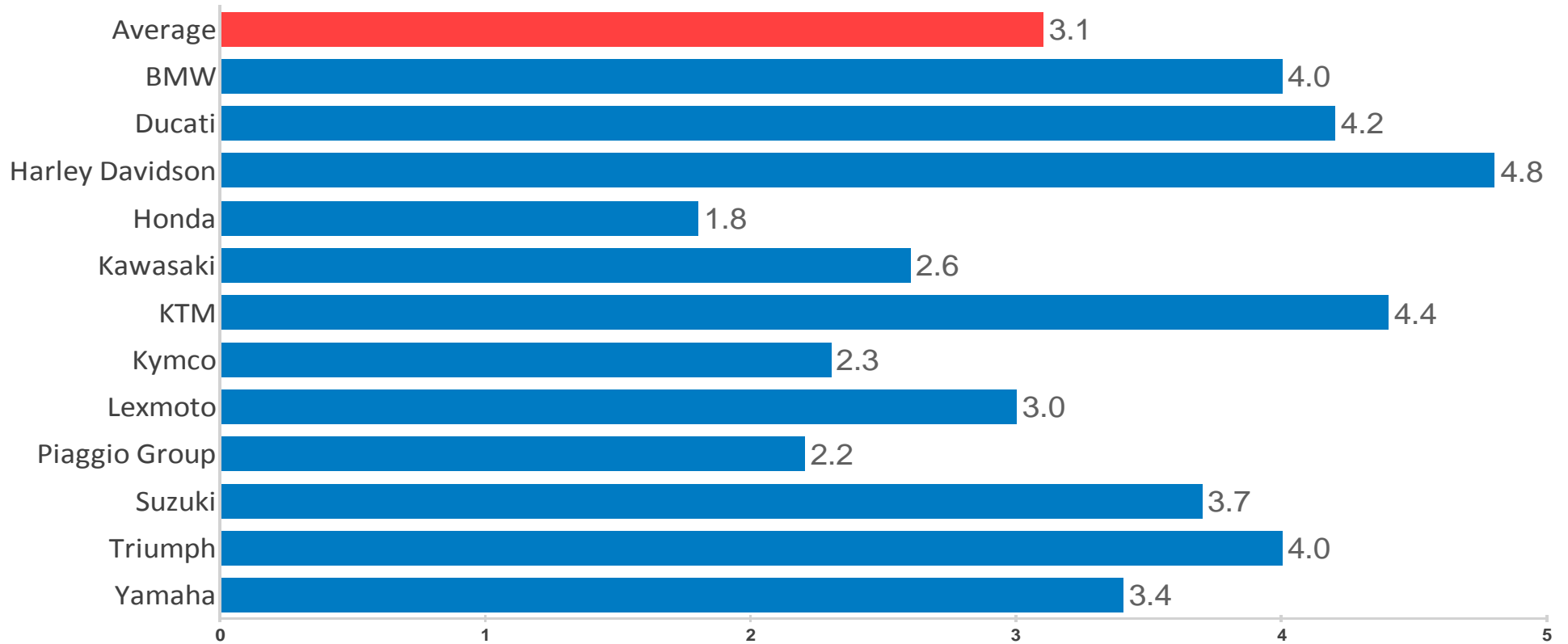


PREVIOUS SURVEY RESULTS – AUTUMN 2015

8f: Have a comprehensive accessory offering that appeals to customers			
BMW	3.0	Lexmoto	4.3
Ducati	3.6	Piaggio Group	2.9
Harley Davidson	4.8	Suzuki	3.9
Honda	1.9	Triumph	4.5
Kawasaki	3.0	Yamaha	4.0
KTM	4.6		
Kymco	2.8	AVERAGE	3.3

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2016 SURVEY

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

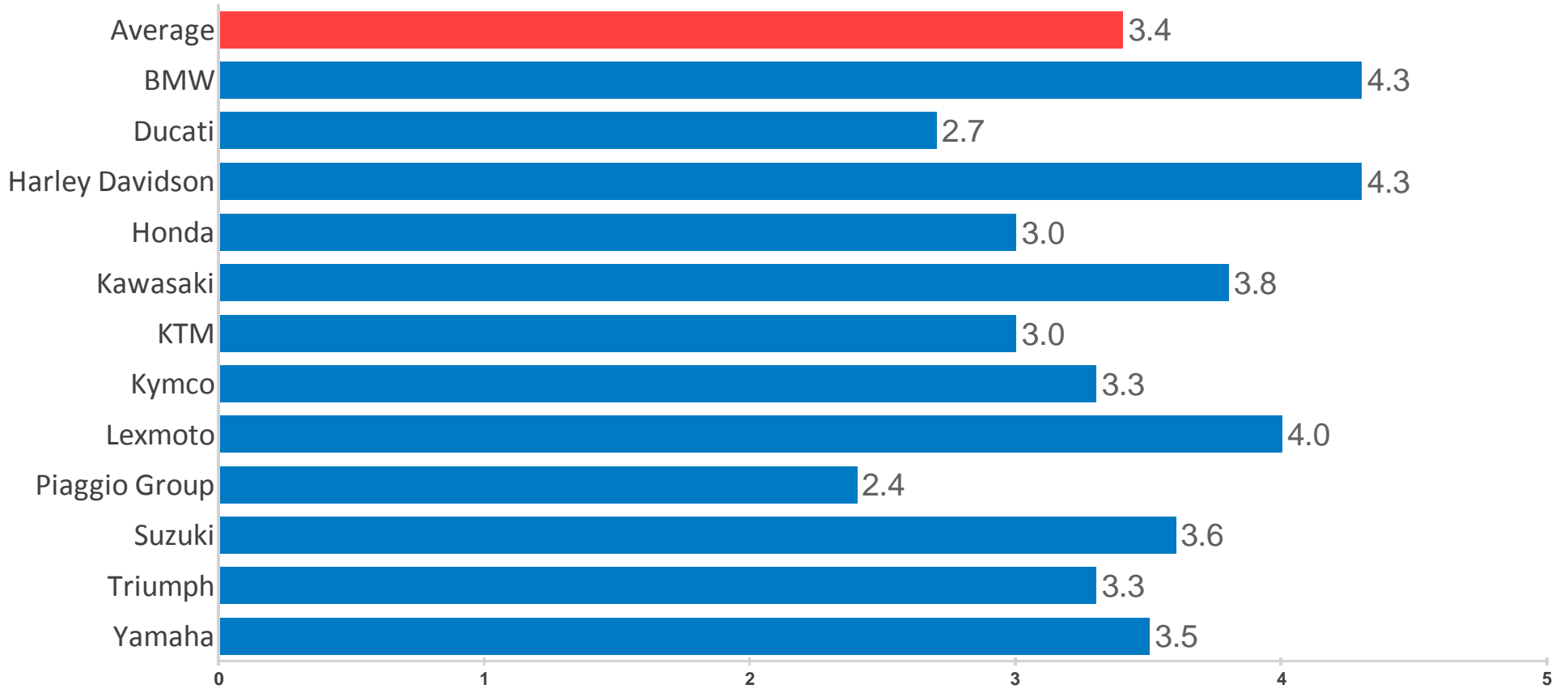


PREVIOUS SURVEY RESULTS – AUTUMN 2015

8g: Have a comprehensive clothing offering that appeals to customers			
BMW	2.6	Lexmoto	2.7
Ducati	3.3	Piaggio Group	2.0
Harley Davidson	4.5	Suzuki	3.6
Honda	1.6	Triumph	4.2
Kawasaki	2.8	Yamaha	3.7
KTM	4.4		
Kymco	1.8	AVERAGE	2.8

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2016 SURVEY

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

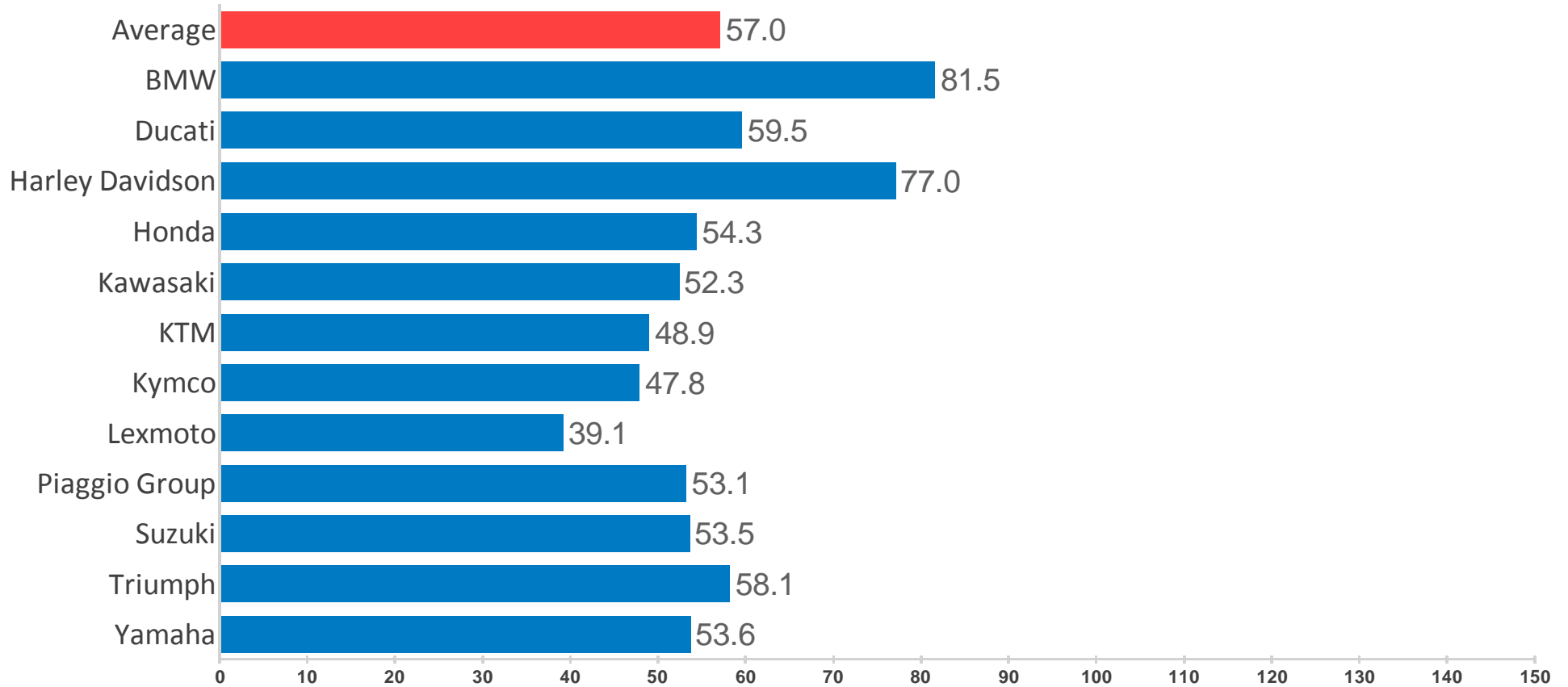


PREVIOUS SURVEY RESULTS – AUTUMN 2015

9: The fairness of your manufacturer's warranty policy			
BMW	3.6	Lexmoto	3.3
Ducati	1.9	Piaggio Group	2.8
Harley Davidson	4.0	Suzuki	3.7
Honda	3.0	Triumph	3.8
Kawasaki	3.8	Yamaha	4.2
KTM	4.0		
Kymco	4.1	AVERAGE	3.4

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2016 SURVEY

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

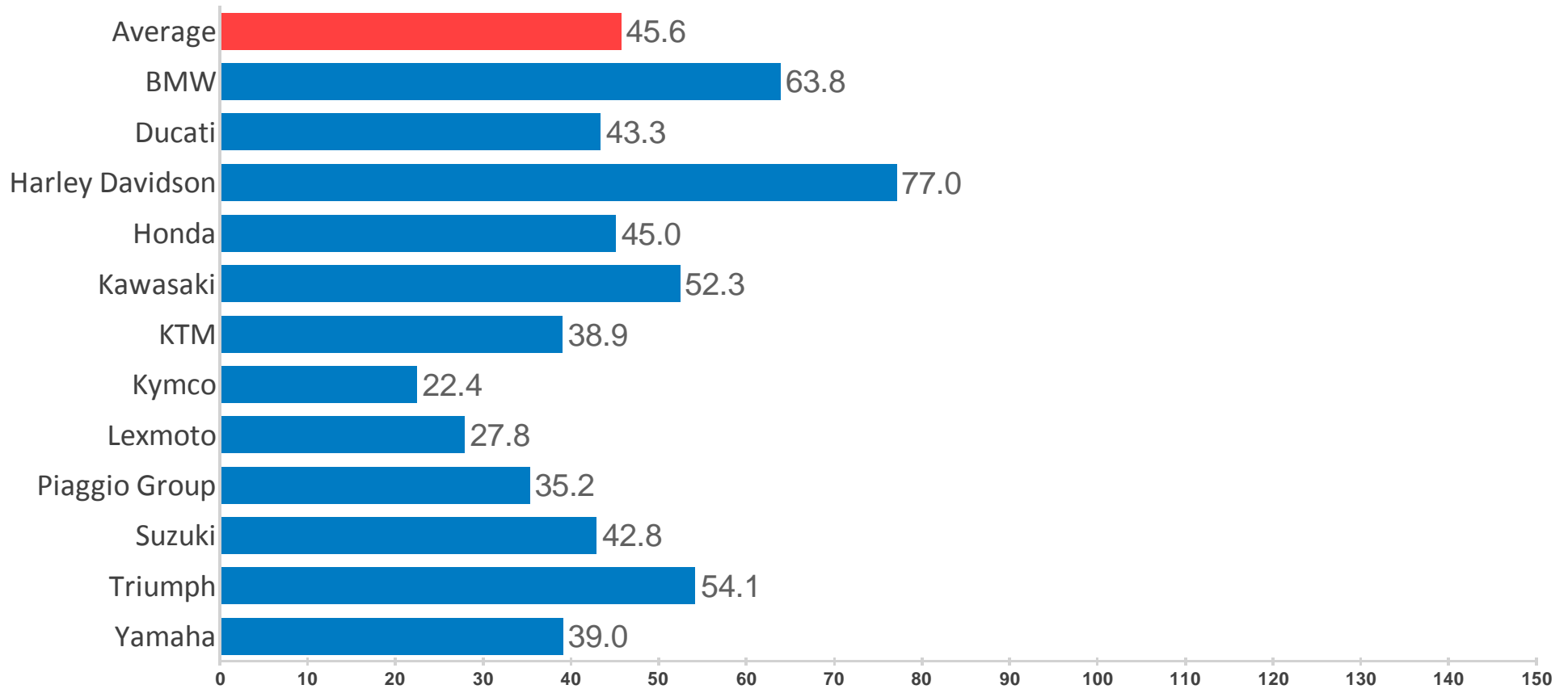


PREVIOUS SURVEY RESULTS – AUTUMN 2015

10: What is your labour rate for retail (£)			
BMW	89.2	Lexmoto	40.7
Ducati	60.3	Piaggio Group	50.2
Harley Davidson	76.8	Suzuki	52.2
Honda	54.1	Triumph	60.3
Kawasaki	53.1	Yamaha	52.5
KTM	50.9		
Kymco	48.3	AVERAGE	53.5

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

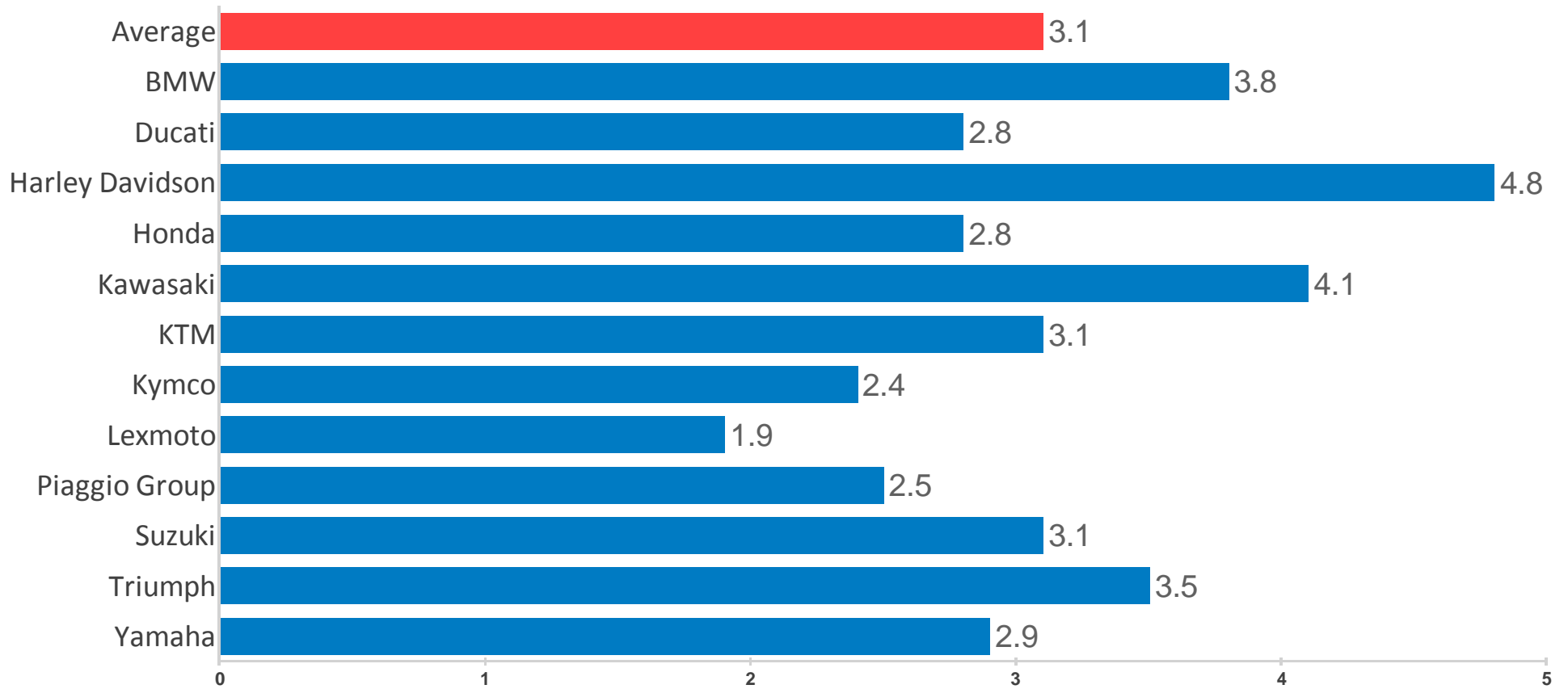


PREVIOUS SURVEY RESULTS – AUTUMN 2015

11. What is your labour rate for warranty (£)			
BMW	70.8	Lexmoto	36.7
Ducati	39.9	Piaggio Group	33.2
Harley Davidson	76.8	Suzuki	37.8
Honda	43.0	Triumph	52.4
Kawasaki	51.5	Yamaha	38.1
KTM	34.7		
Kymco	24.0	AVERAGE	41.2

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2016 SURVEY

Q12 a) Warranty labour rate

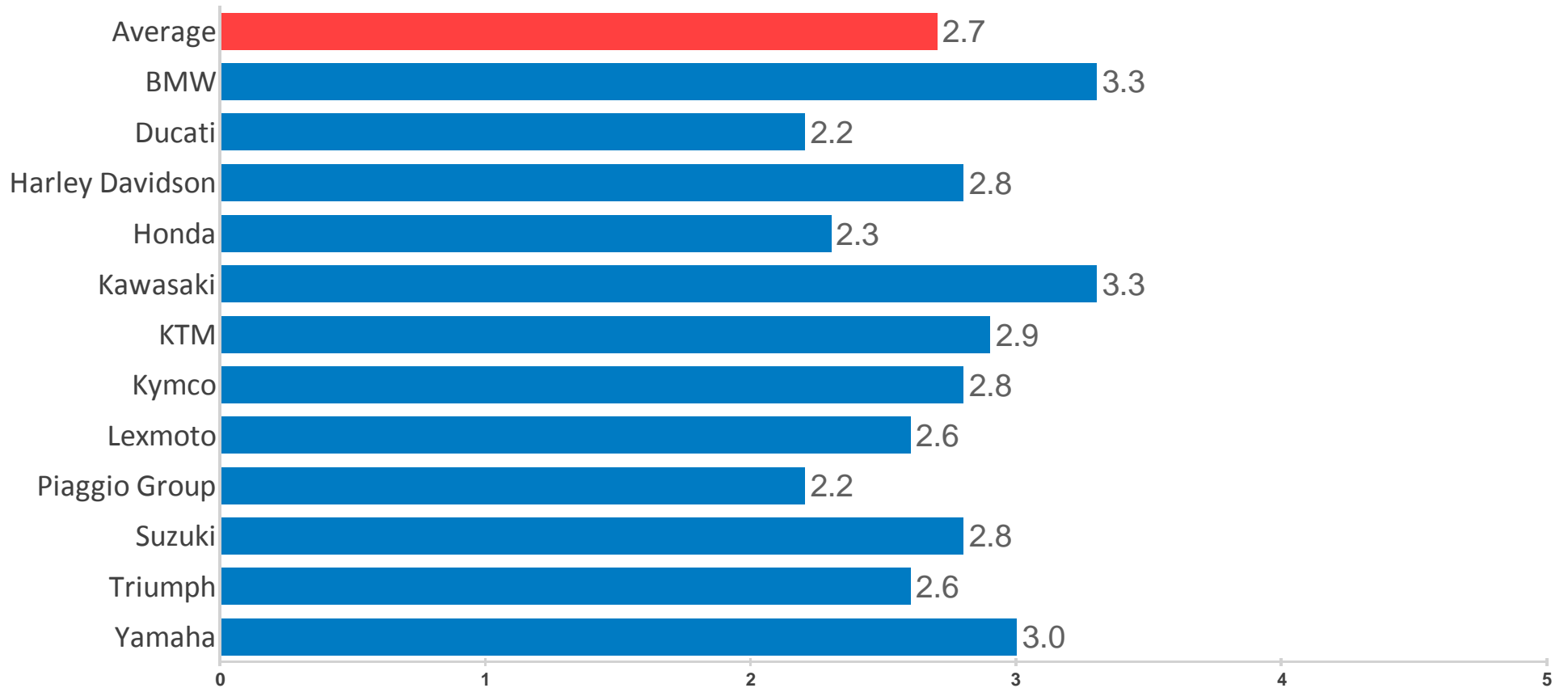


PREVIOUS SURVEY RESULTS – AUTUMN 2015

12a: Warranty labour rate			
BMW	2.4	Lexmoto	2.1
Ducati	1.4	Piaggio Group	2.2
Harley Davidson	4.8	Suzuki	3.2
Honda	3.1	Triumph	4.0
Kawasaki	3.8	Yamaha	2.7
KTM	3.0		
Kymco	2.4	AVERAGE	2.9

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2016 SURVEY

Q12 b) Warranty time allowances

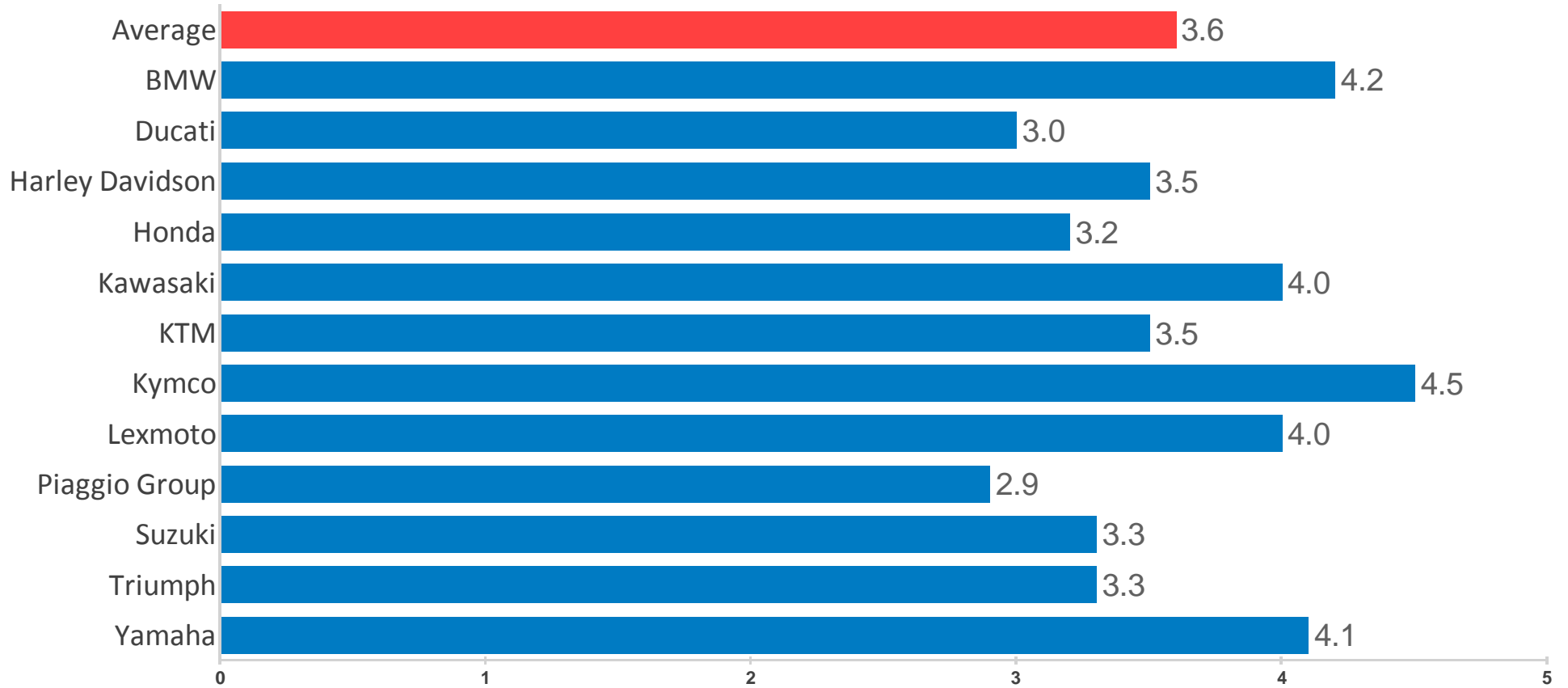


PREVIOUS SURVEY RESULTS – AUTUMN 2015

12b: Warranty time allowances			
BMW	2.2	Lexmoto	3.1
Ducati	1.6	Piaggio Group	2.0
Harley Davidson	4.0	Suzuki	3.2
Honda	2.4	Triumph	2.8
Kawasaki	3.3	Yamaha	2.6
KTM	2.6		
Kymco	3.1	AVERAGE	2.7

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2016 SURVEY

Q12 c) Warranty replacement parts policy

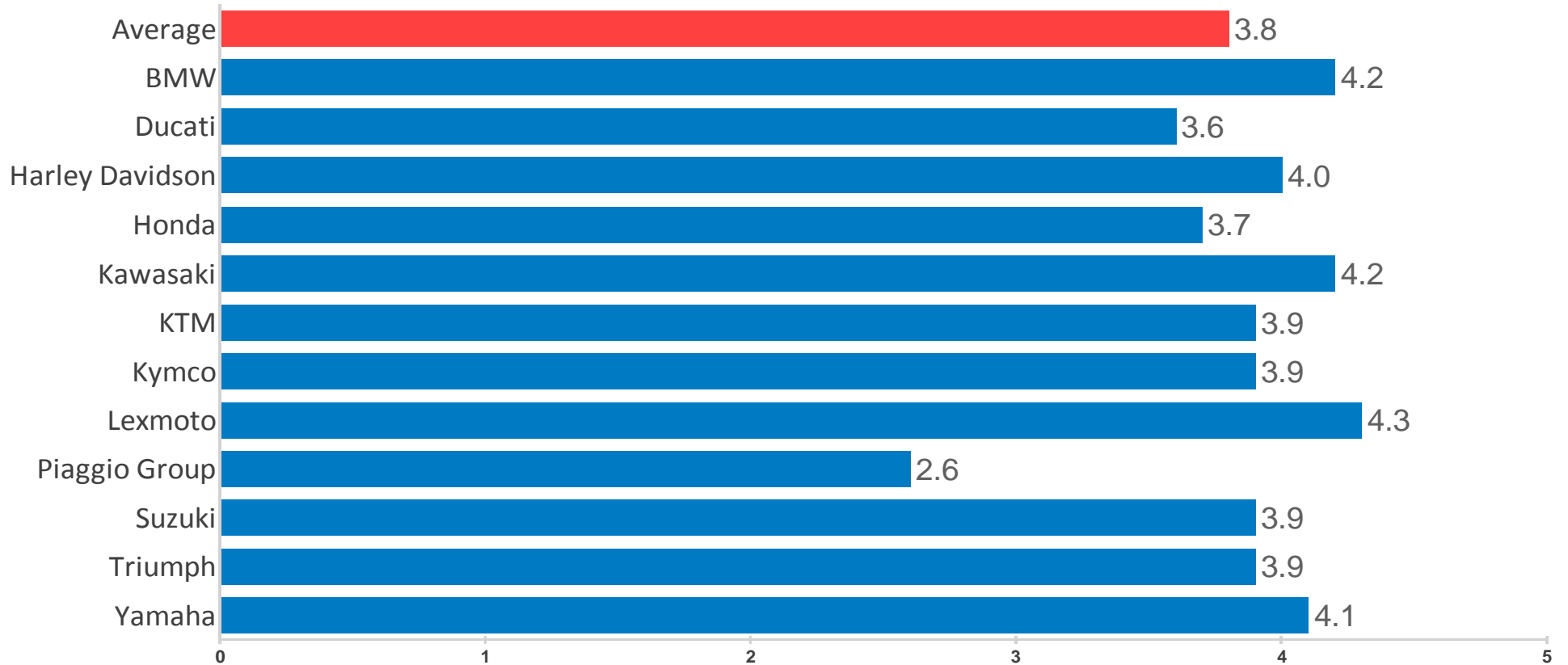


PREVIOUS SURVEY RESULTS – AUTUMN 2015

12c: Warranty replacement parts policy			
BMW	2.8	Lexmoto	4.3
Ducati	2.7	Piaggio Group	2.5
Harley Davidson	4.5	Suzuki	3.7
Honda	3.3	Triumph	4.1
Kawasaki	4.2	Yamaha	4.1
KTM	4.0		
Kymco	4.6	AVERAGE	3.6

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2016 SURVEY

Q12 d) Timely and fair settlement of warranty claims

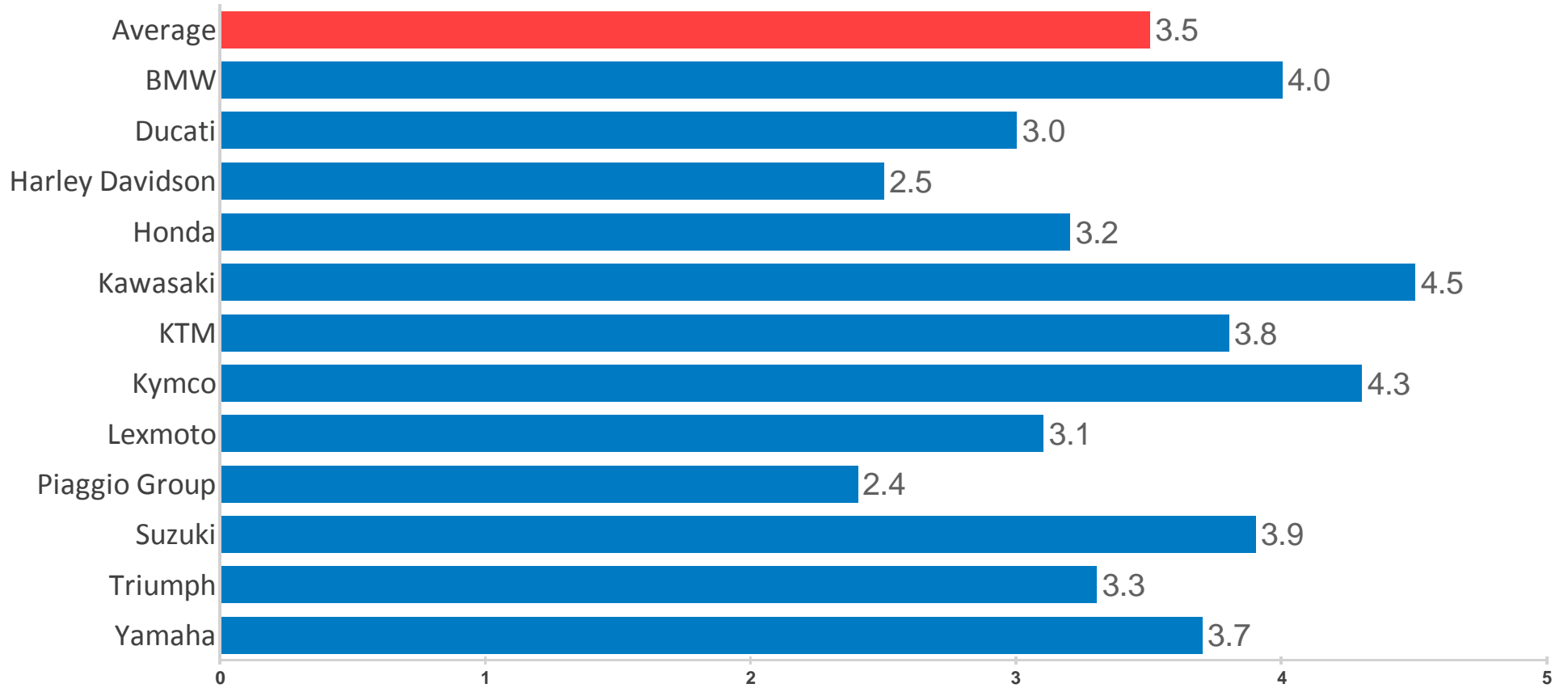


PREVIOUS SURVEY RESULTS – AUTUMN 2015

12d: Timely and fair settlement of warranty claims			
BMW	2.8	Lexmoto	3.9
Ducati	2.9	Piaggio Group	2.1
Harley Davidson	4.5	Suzuki	3.8
Honda	3.6	Triumph	4.4
Kawasaki	4.3	Yamaha	4.3
KTM	4.4		
Kymco	4.5	AVERAGE	3.7

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2016 SURVEY

Q12 e) Quality and availability of technical support

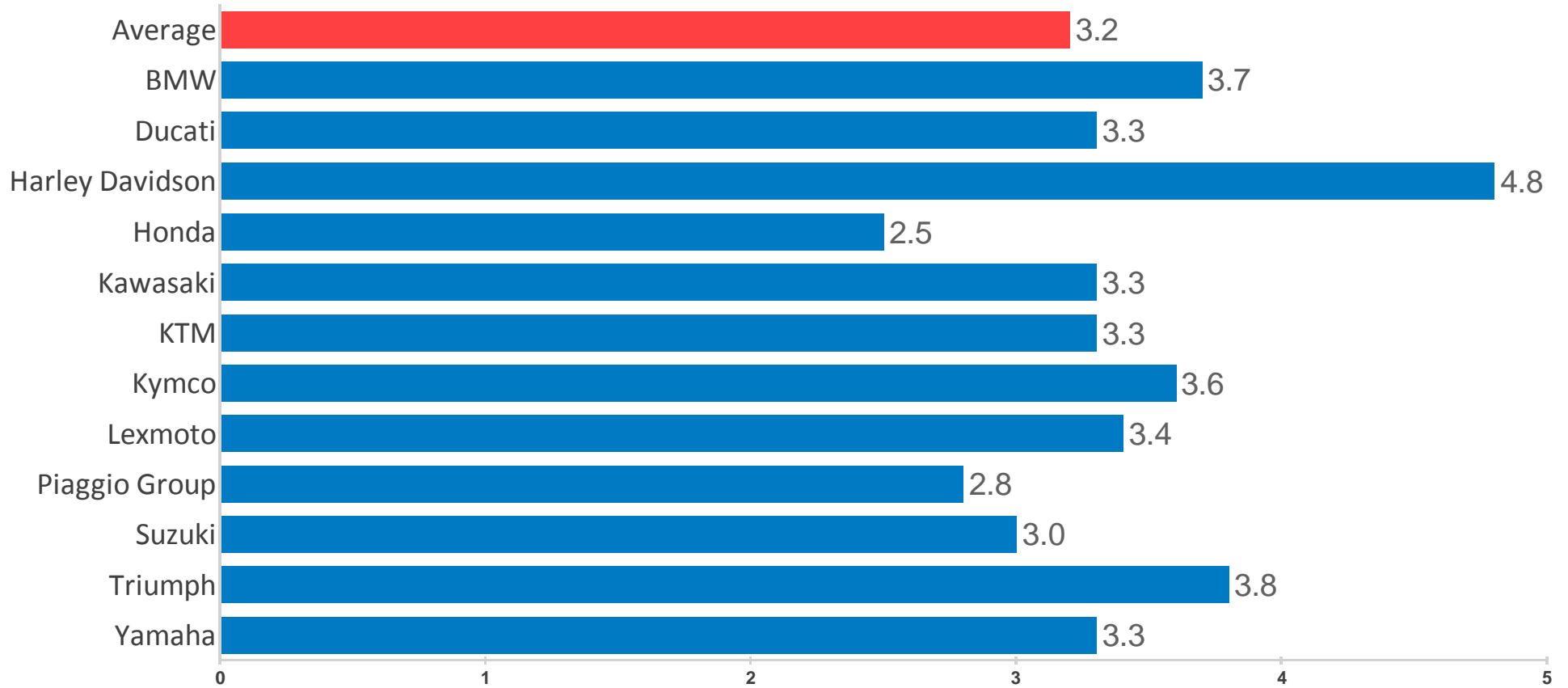


PREVIOUS SURVEY RESULTS – AUTUMN 2015

12e: Quality and availability of technical support			
BMW	2.4	Lexmoto	3.7
Ducati	2.1	Piaggio Group	2.5
Harley Davidson	3.5	Suzuki	4.0
Honda	3.5	Triumph	3.8
Kawasaki	4.2	Yamaha	3.6
KTM	3.8		
Kymco	4.7	AVERAGE	3.5

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2016 SURVEY

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

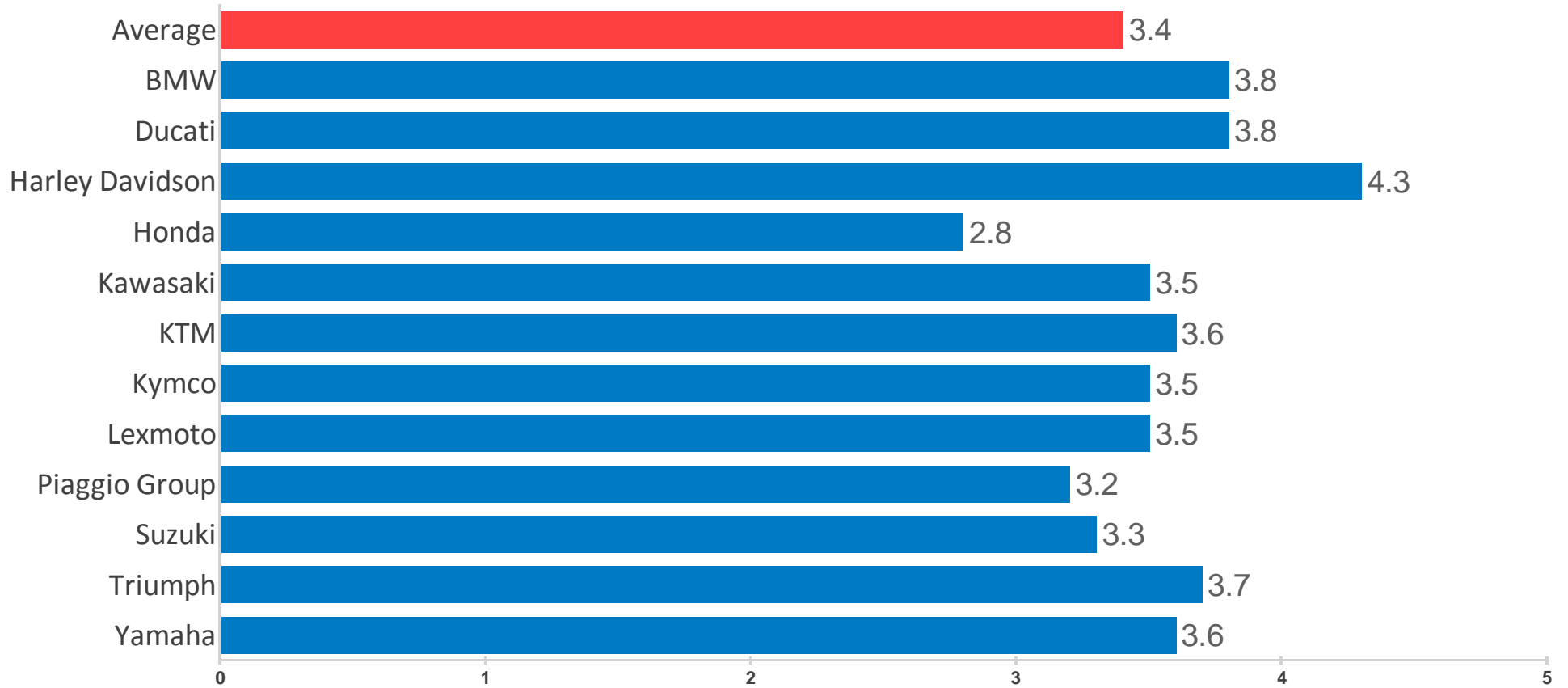


PREVIOUS SURVEY RESULTS – AUTUMN 2015

13: The profit return by representing your franchise			
BMW	3.2	Lexmoto	3.5
Ducati	2.9	Piaggio Group	2.8
Harley Davidson	4.0	Suzuki	3.4
Honda	2.2	Triumph	3.5
Kawasaki	3.5	Yamaha	3.5
KTM	3.8		
Kymco	3.6	AVERAGE	3.1

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Q14 a) The future profitability of your business

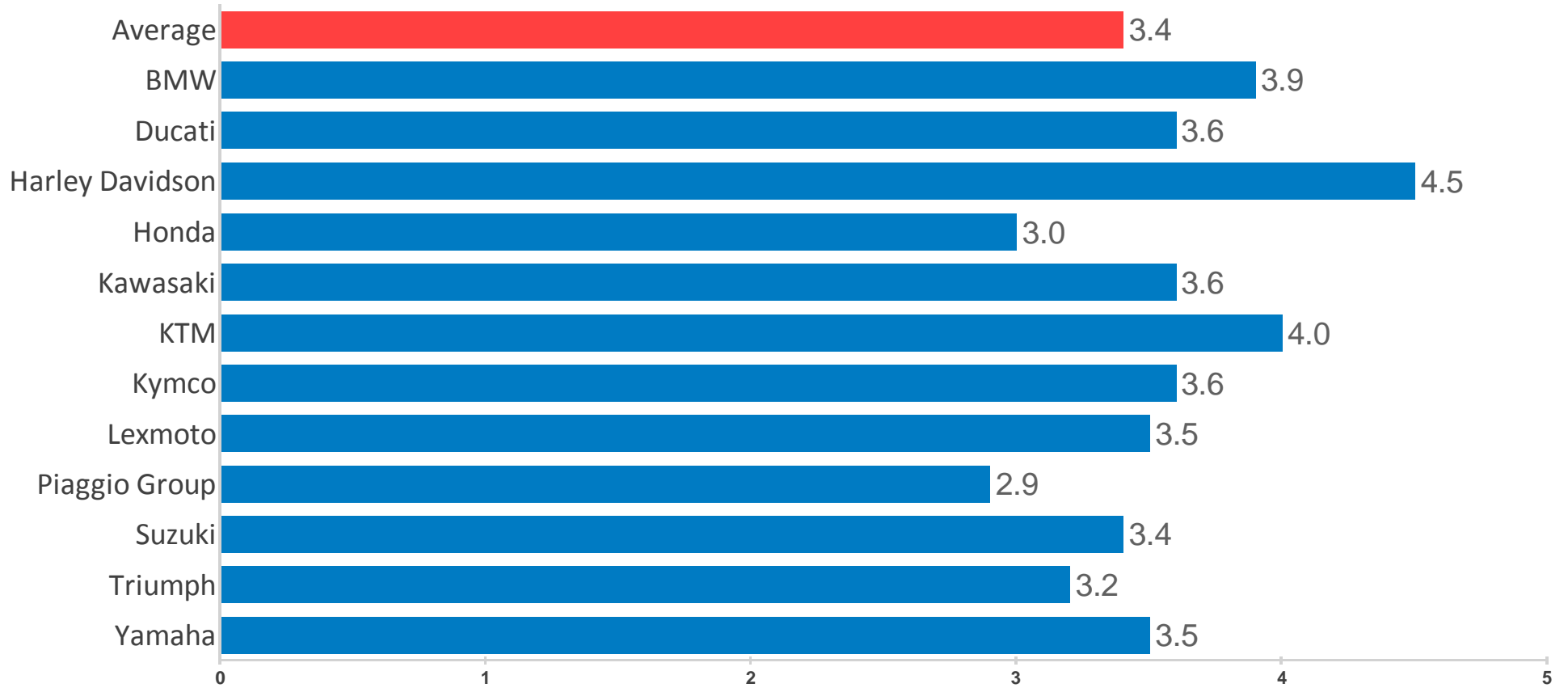


PREVIOUS SURVEY RESULTS – AUTUMN 2015

14a: The future profitability of your business			
BMW	2.4	Lexmoto	3.8
Ducati	3.1	Piaggio Group	3.1
Harley Davidson	4.5	Suzuki	3.4
Honda	2.5	Triumph	3.8
Kawasaki	4.0	Yamaha	3.5
KTM	4.0		
Kymco	3.2	AVERAGE	3.3

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2016 SURVEY

Q14 b) Your stocking plan for this franchise

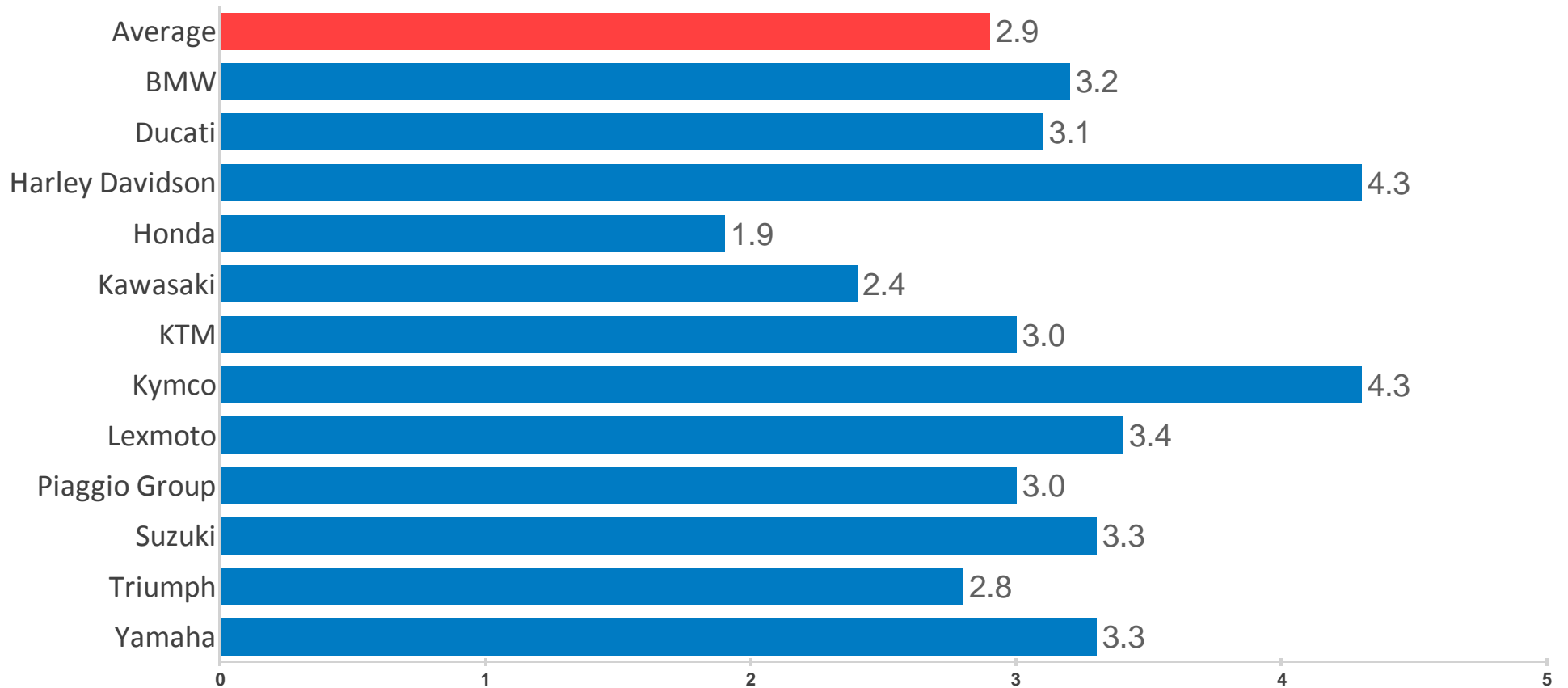


PREVIOUS SURVEY RESULTS – AUTUMN 2015

14b: Your stocking plan for this franchise			
BMW	2.5	Lexmoto	4.2
Ducati	3.0	Piaggio Group	2.9
Harley Davidson	4.5	Suzuki	3.4
Honda	2.4	Triumph	3.7
Kawasaki	3.6	Yamaha	3.5
KTM	3.6		
Kymco	3.6	AVERAGE	3.2

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2016 SURVEY

Q15 a) The dealer standards expected by your manufacturer

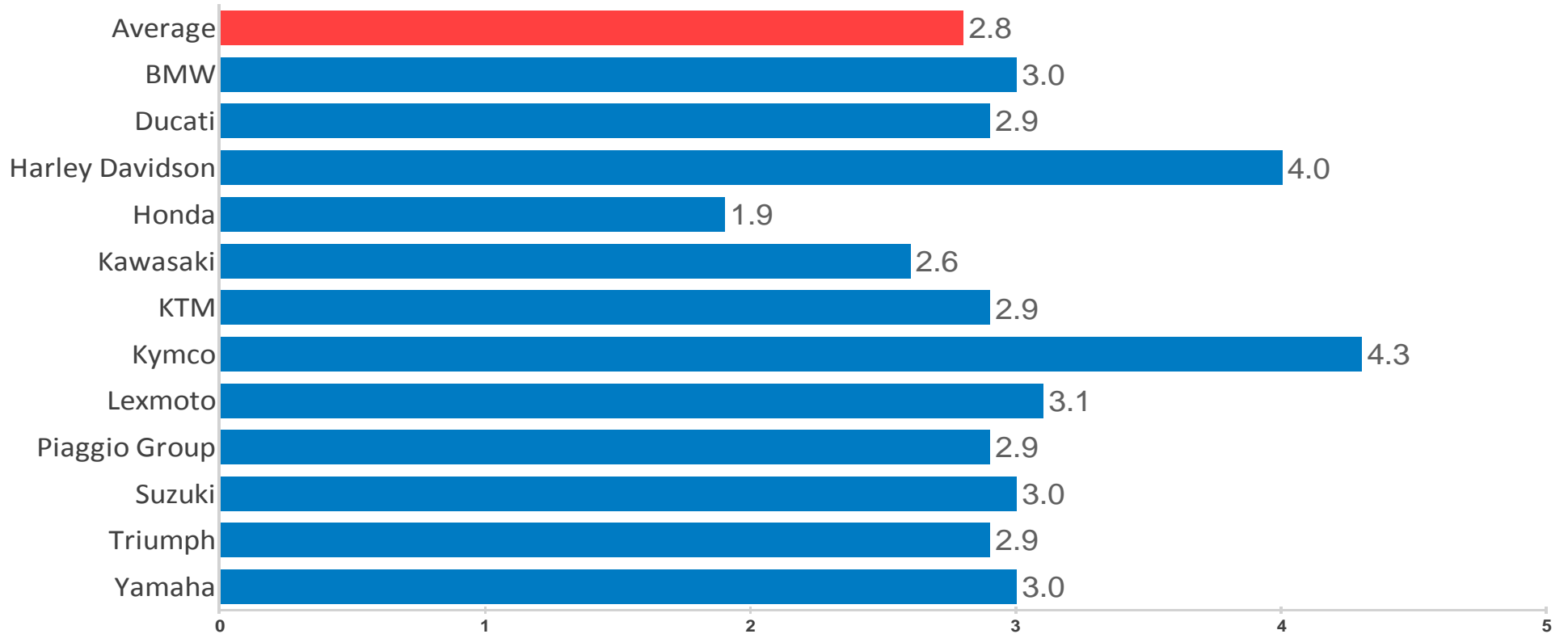


PREVIOUS SURVEY RESULTS –AUTUMN 2015

15a: The dealer standards expected by your manufacturer			
BMW	2.0	Lexmoto	3.8
Ducati	3.0	Piaggio Group	2.6
Harley Davidson	4.0	Suzuki	3.5
Honda	2.0	Triumph	3.2
Kawasaki	3.3	Yamaha	3.4
KTM	3.3		
Kymco	4.0	AVERAGE	3.0

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2016 SURVEY

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

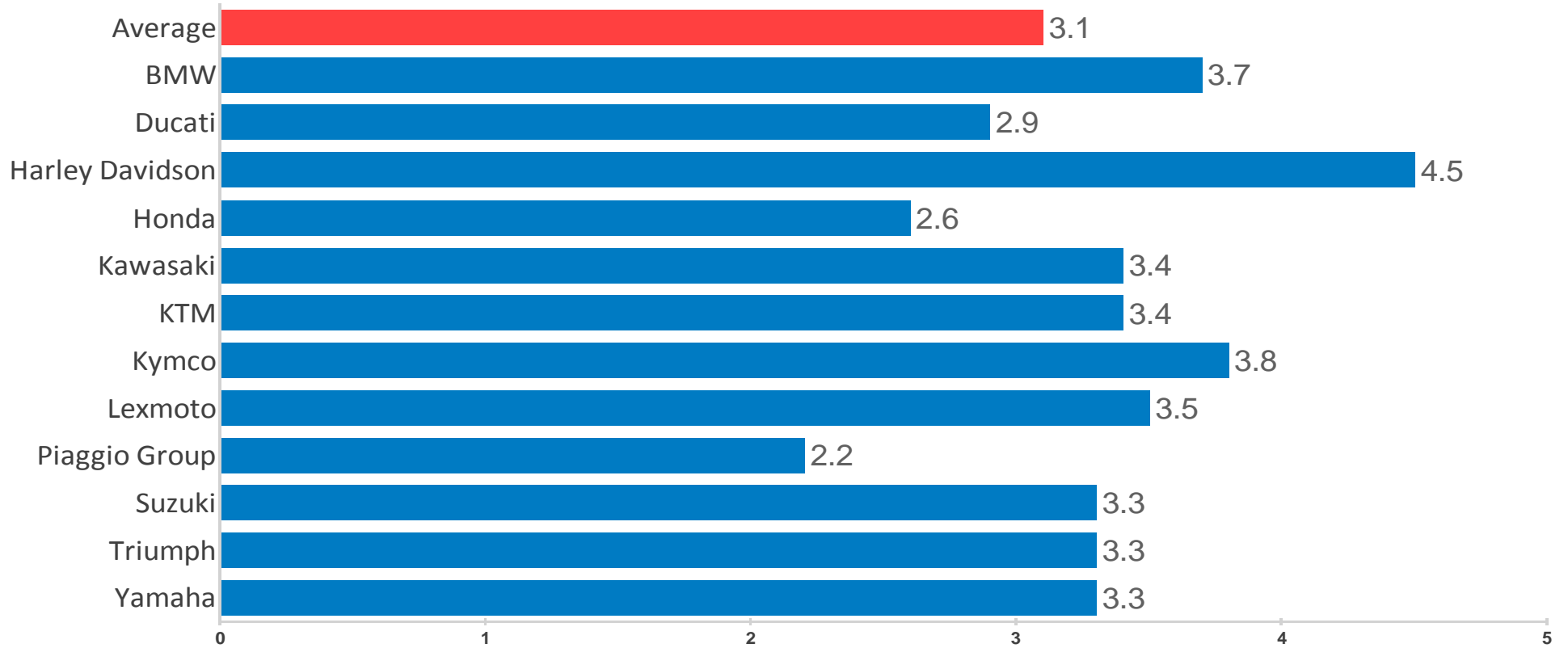


PREVIOUS SURVEY RESULTS – AUTUMN 2015

15b: How realistic do you feel your manufacturer's standards are compared with the return on investment/reward			
BMW	1.6	Lexmoto	3.7
Ducati	2.6	Piaggio Group	2.5
Harley Davidson	4.0	Suzuki	3.3
Honda	1.8	Triumph	3.1
Kawasaki	3.2	Yamaha	3.3
KTM	3.1		
Kymco	4.1	AVERAGE	2.8

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

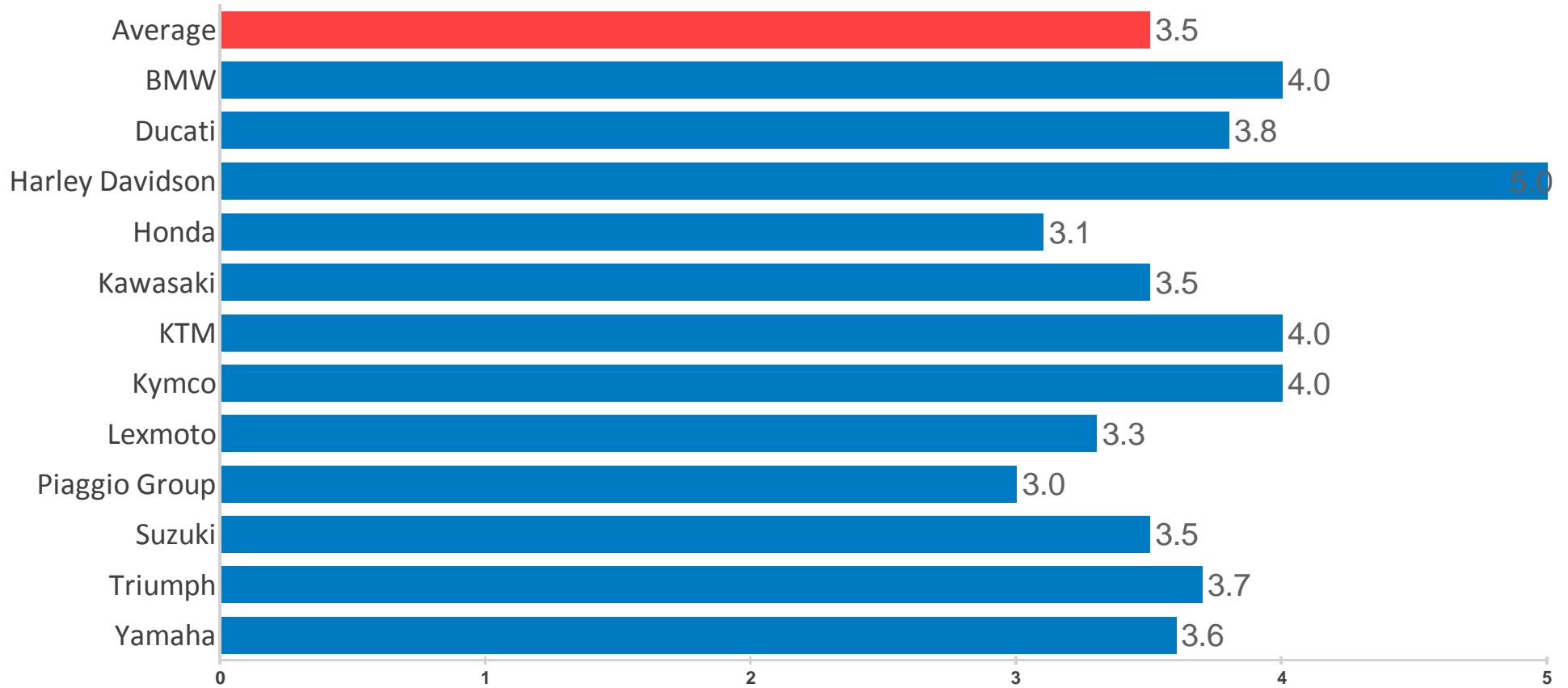


PREVIOUS SURVEY RESULTS – AUTUMN 2015

16a: That the management of your manufacturer takes dealers' views and opinions into account			
BMW	2.0	Lexmoto	3.7
Ducati	2.3	Piaggio Group	2.3
Harley Davidson	4.5	Suzuki	3.5
Honda	2.3	Triumph	3.7
Kawasaki	3.9	Yamaha	3.3
KTM	3.7		
Kymco	4.0	AVERAGE	3.1

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2016 SURVEY

Q16 b) The effectiveness of the field sales team

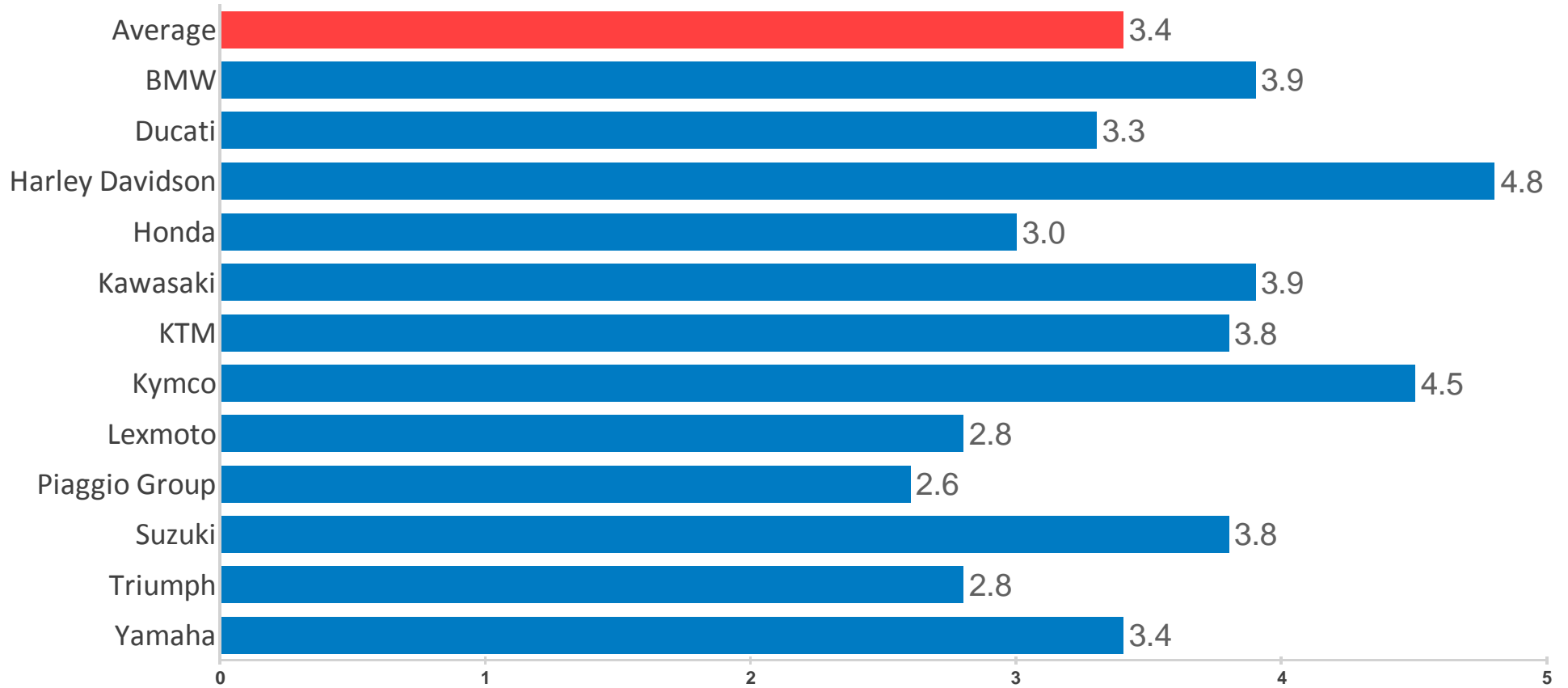


PREVIOUS SURVEY RESULTS – AUTUMN 2015

16b: The effectiveness of your field sales team			
BMW	2.4	Lexmoto	4.2
Ducati	2.7	Piaggio Group	3.4
Harley Davidson	4.3	Suzuki	4.2
Honda	3.0	Triumph	4.0
Kawasaki	3.7	Yamaha	3.8
KTM	4.1		
Kymco	4.2	AVERAGE	3.6

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2016 SURVEY

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

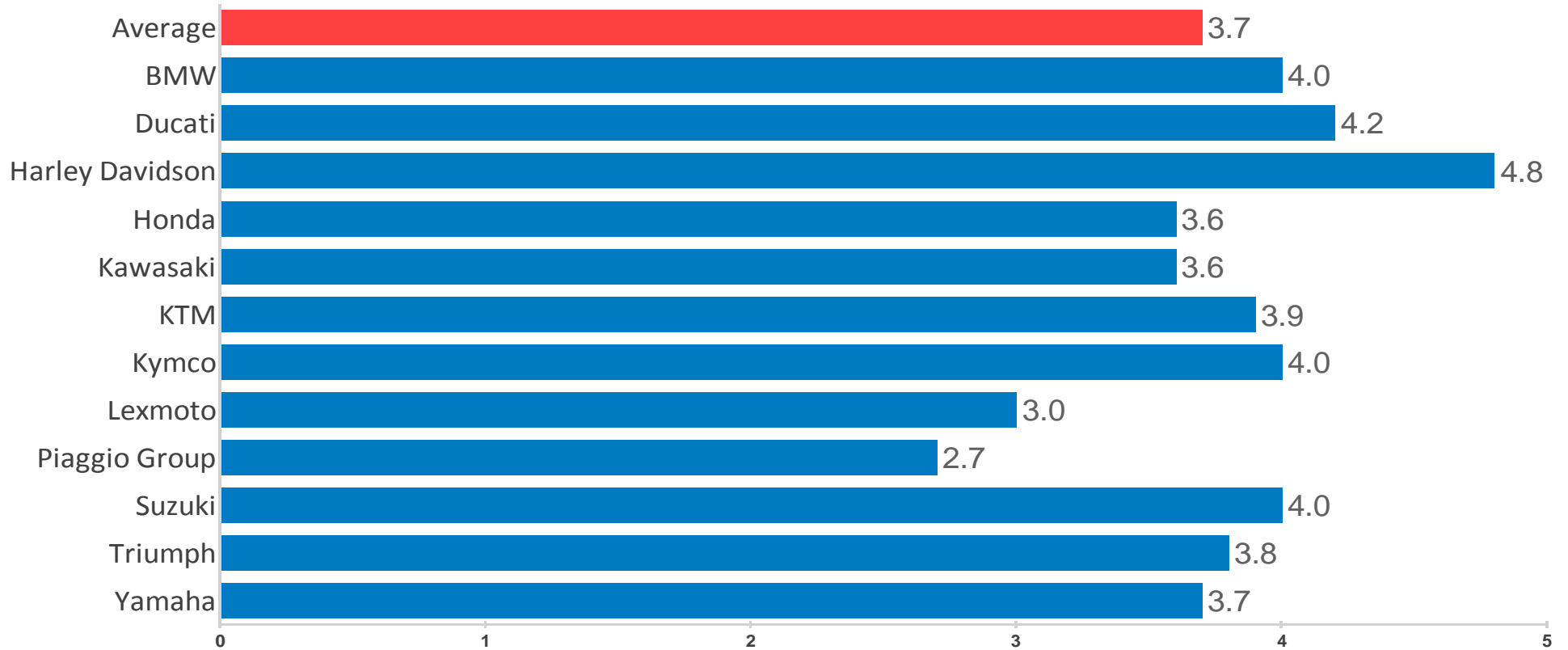


PREVIOUS SURVEY RESULTS – AUTUMN 2015

16c: The effectiveness of the field service and parts staff			
BMW	2.5	Lexmoto	4.1
Ducati	2.3	Piaggio Group	3.1
Harley Davidson	4.3	Suzuki	4.0
Honda	2.7	Triumph	3.8
Kawasaki	3.8	Yamaha	3.5
KTM	4.0		
Kymco	4.4	AVERAGE	3.4

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2016 SURVEY

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

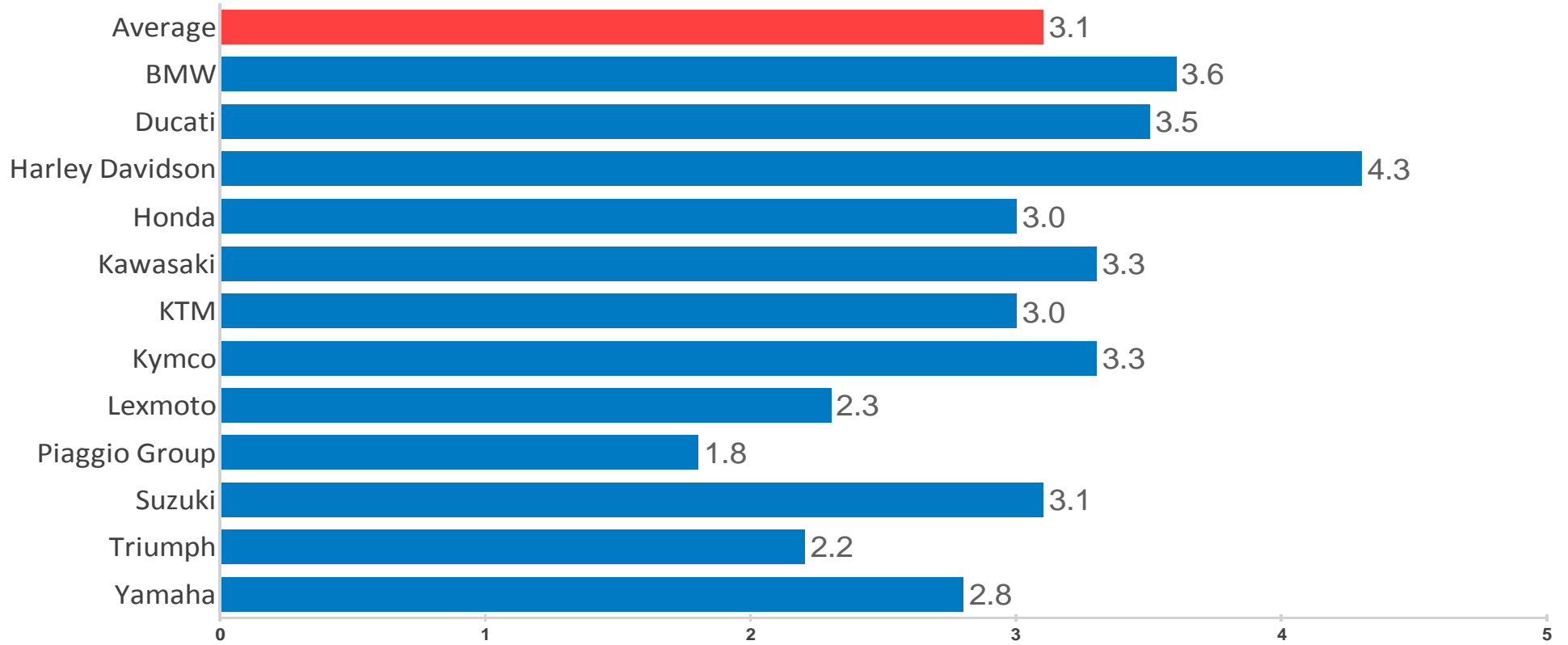


PREVIOUS SURVEY RESULTS – AUTUMN 2015

16d: The effectiveness of your manufacturer's retail finance programme			
BMW	3.2	Lexmoto	3.4
Ducati	3.0	Piaggio Group	3.0
Harley Davidson	4.0	Suzuki	4.0
Honda	3.0	Triumph	3.8
Kawasaki	4.3	Yamaha	3.8
KTM	3.9		
Kymco	3.7	AVERAGE	3.5

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2016 SURVEY

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

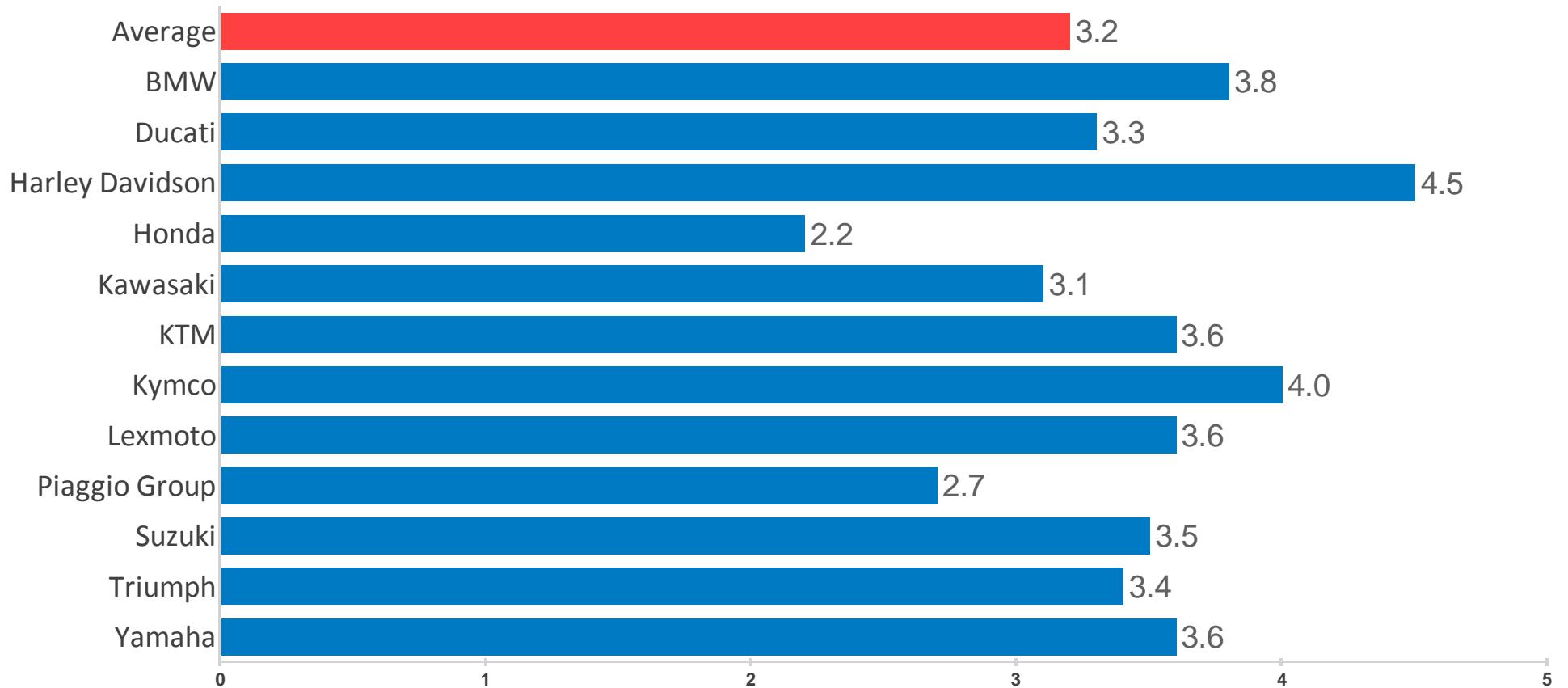


PREVIOUS SURVEY RESULTS – AUTUMN 2015

16e: The effectiveness of your dealer council and dealer forums			
BMW	3.0	Lexmoto	4.0
Ducati	1.8	Piaggio Group	2.1
Harley Davidson	4.0	Suzuki	3.2
Honda	2.7	Triumph	3.1
Kawasaki	3.2	Yamaha	3.0
KTM	3.1		
Kymco	3.3	AVERAGE	2.9

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2016 SURVEY

Q17 a) The routine procedures and controls expected

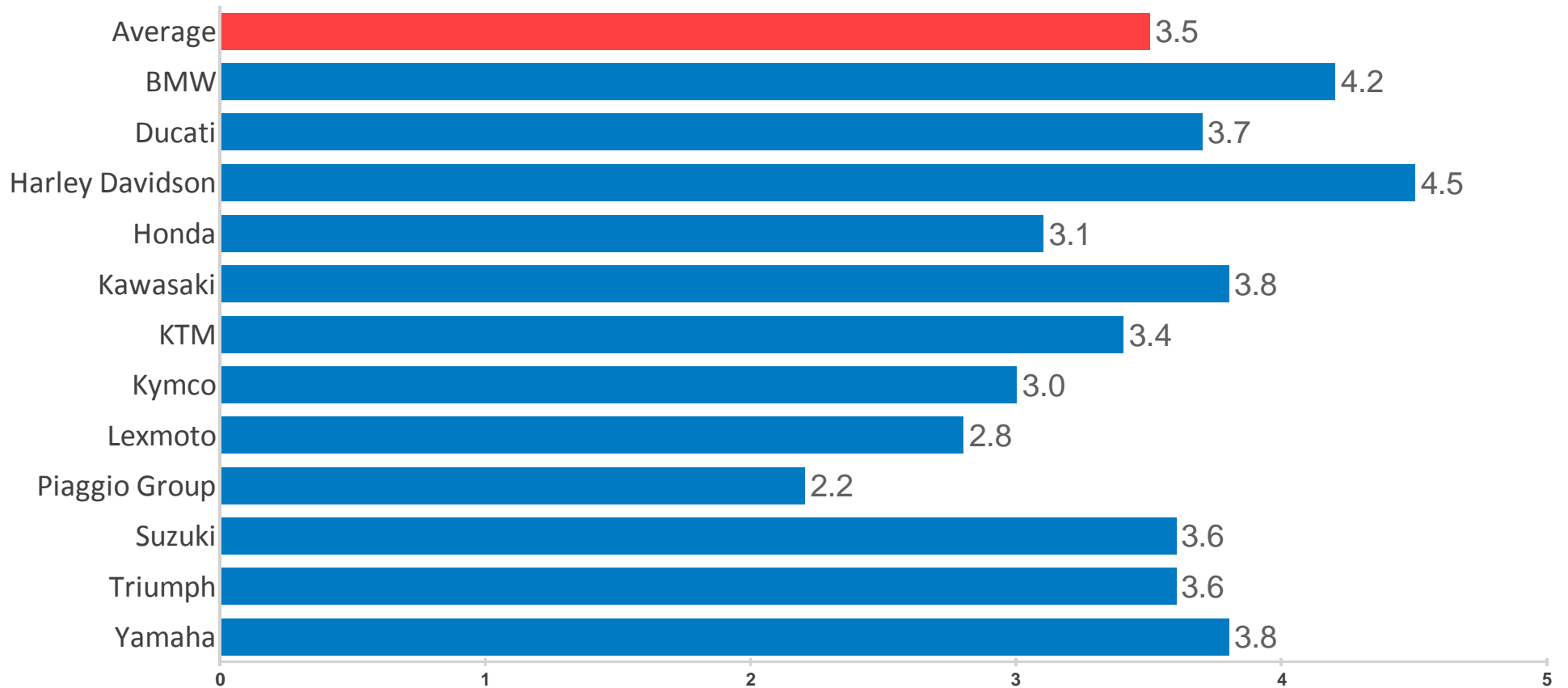


PREVIOUS SURVEY RESULTS – AUTUMN 2015

17a: The routine procedures and controls expected			
BMW	3.0	Lexmoto	4.2
Ducati	3.0	Piaggio Group	2.8
Harley Davidson	4.8	Suzuki	3.6
Honda	2.2	Triumph	3.9
Kawasaki	3.4	Yamaha	3.5
KTM	3.8		
Kymco	4.1	AVERAGE	3.2

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2016 SURVEY

Q17 b) The quality of your manufacturer's training

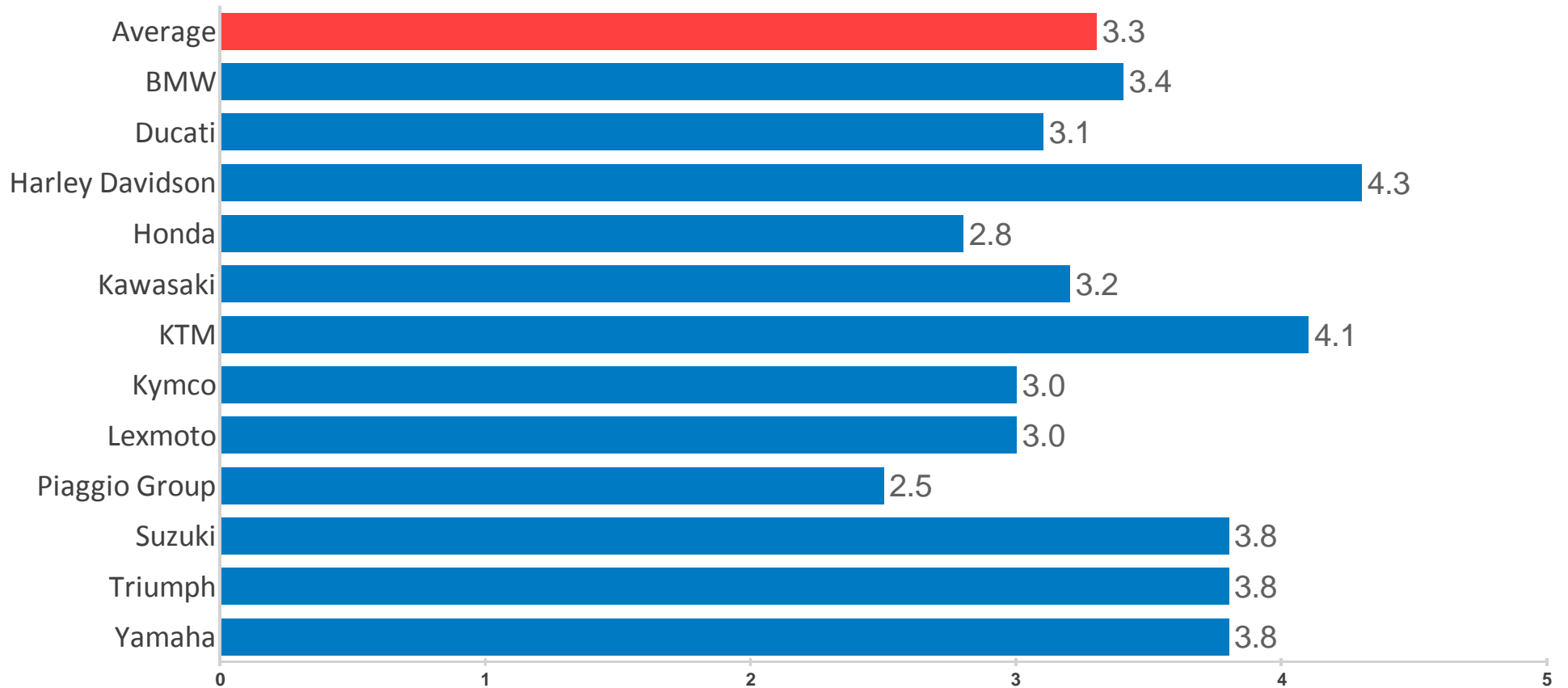


PREVIOUS SURVEY RESULTS – AUTUMN 2015

17b: The quality of your manufacturer's training			
BMW	3.4	Lexmoto	3.0
Ducati	2.4	Piaggio Group	1.9
Harley Davidson	4.0	Suzuki	3.6
Honda	3.1	Triumph	4.2
Kawasaki	3.5	Yamaha	3.6
KTM	4.1		
Kymco	3.0	AVERAGE	3.2

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2016 SURVEY

Q17 c) The cost of your manufacturer's training

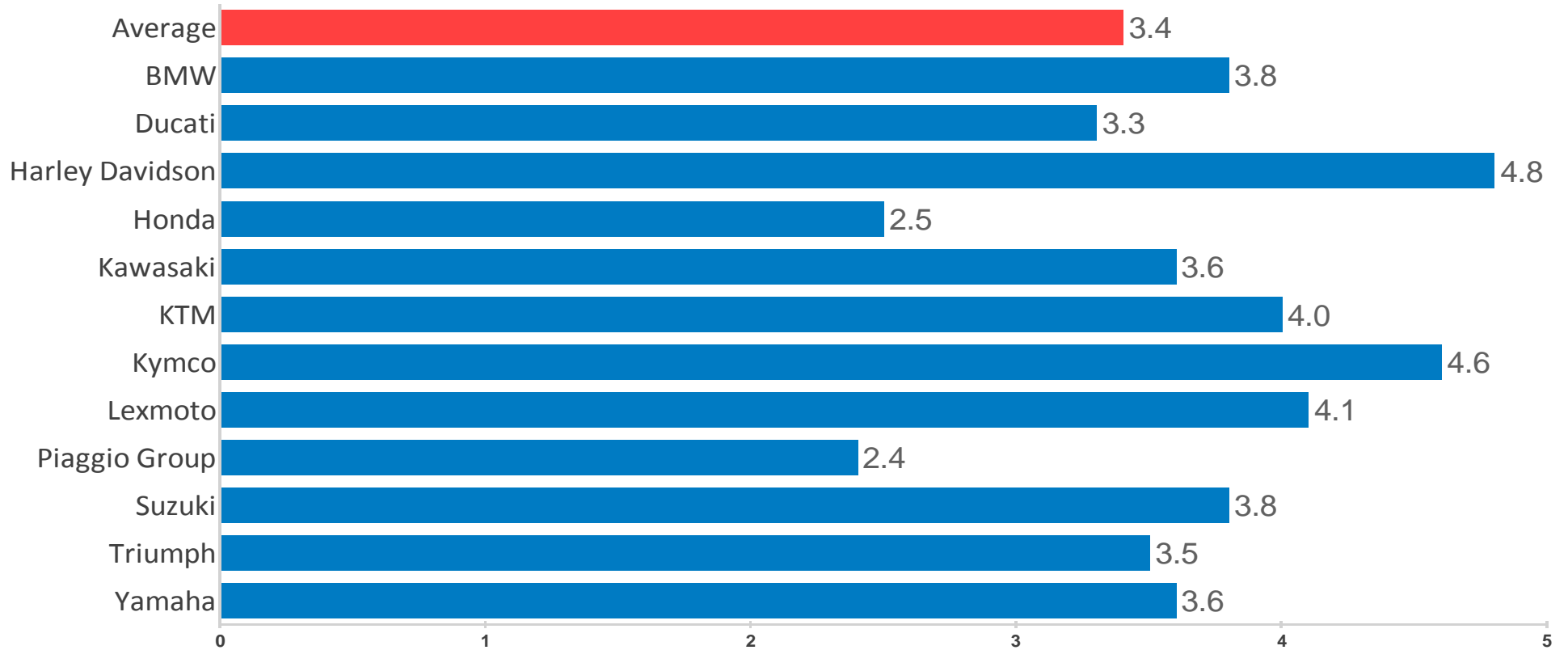


PREVIOUS SURVEY RESULTS – AUTUMN 2015

17c: The cost of your manufacturer's training			
BMW	2.8	Lexmoto	3.3
Ducati	1.9	Piaggio Group	2.4
Harley Davidson	3.5	Suzuki	3.6
Honda	2.9	Triumph	3.8
Kawasaki	3.3	Yamaha	3.8
KTM	4.4		
Kymco	3.6	AVERAGE	3.2

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2016 SURVEY

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

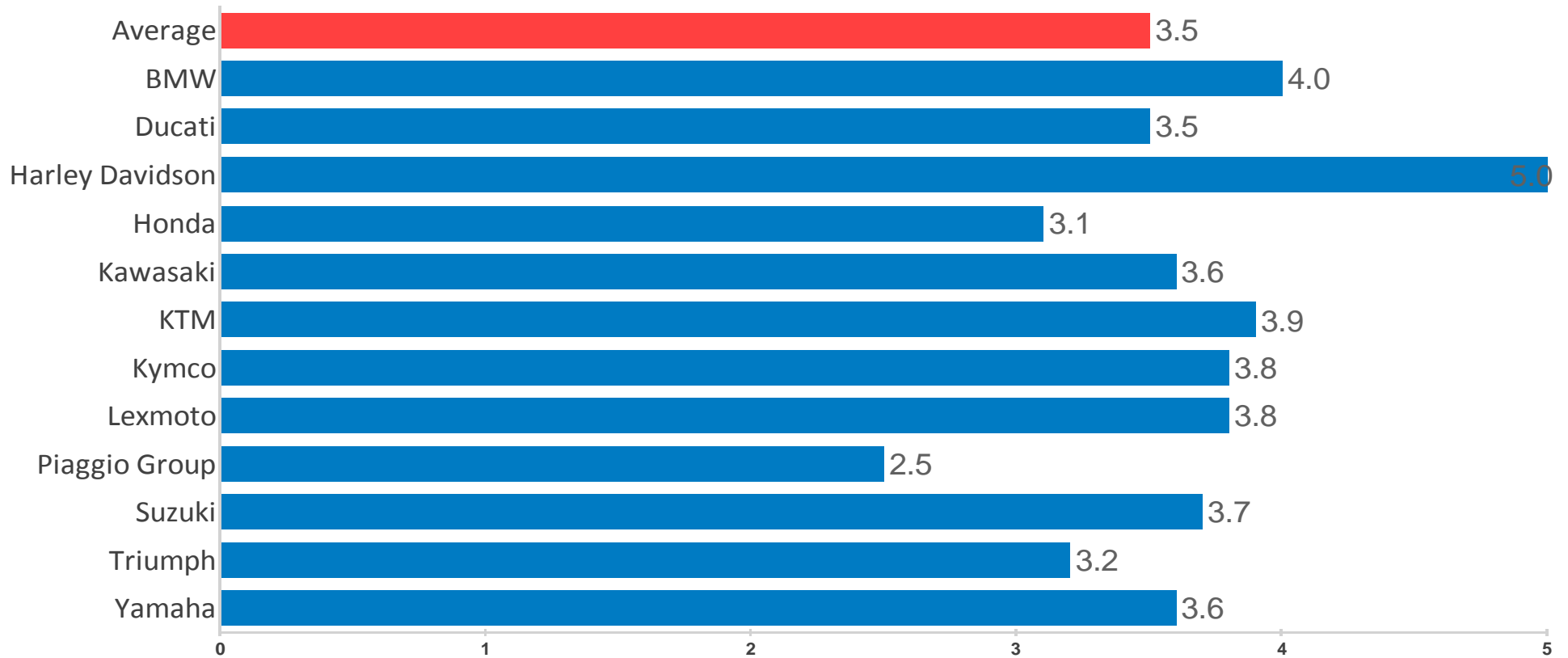


PREVIOUS SURVEY RESULTS – AUTUMN 2015

17d: Your ability to do business with your manufacturer on a day-to-day basis			
BMW	2.2	Lexmoto	4.5
Ducati	3.0	Piaggio Group	2.6
Harley Davidson	4.5	Suzuki	4.1
Honda	2.3	Triumph	4.1
Kawasaki	4.2	Yamaha	4.0
KTM	4.5		
Kymco	4.7	AVERAGE	3.5

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2016 SURVEY

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

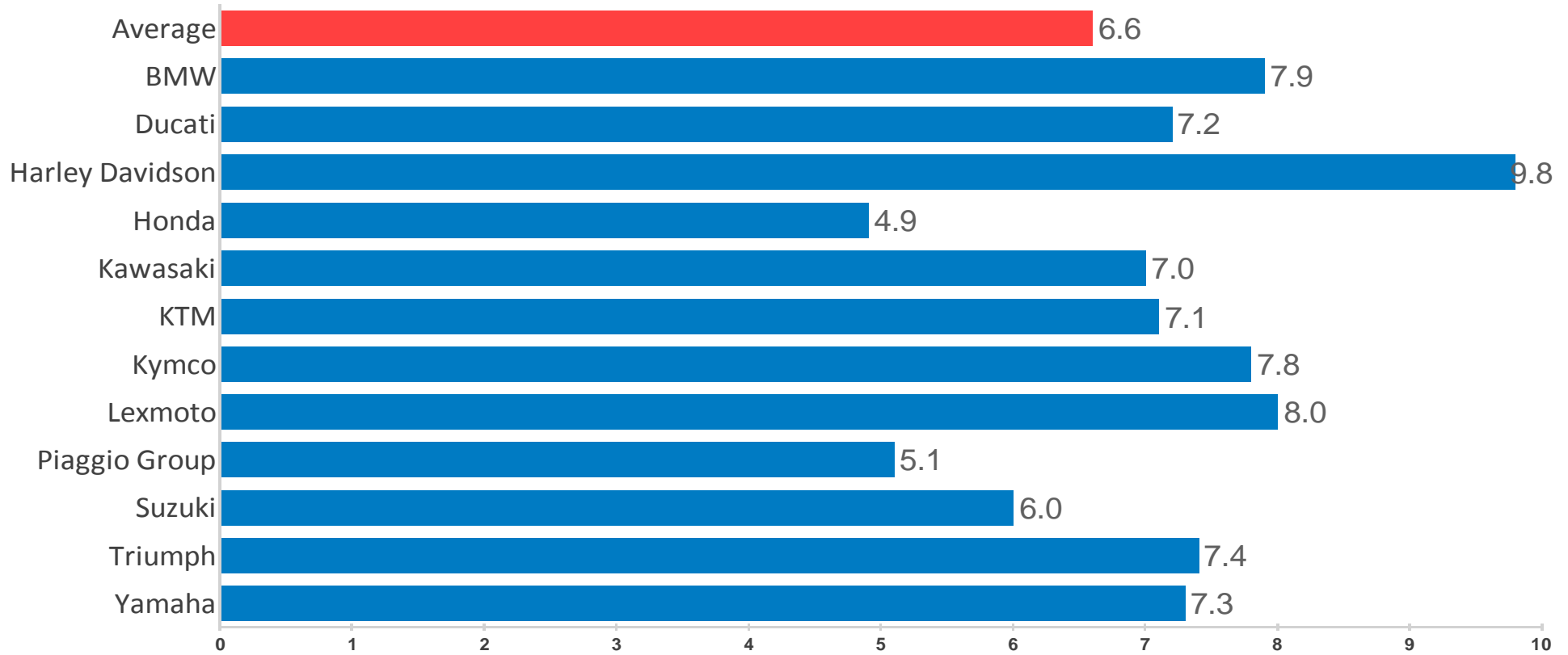


PREVIOUS SURVEY RESULTS – AUTUMN 2015

17e: The support and assistance provided by your manufacturer to enable you to follow a professional sales process			
BMW	2.8	Lexmoto	4.1
Ducati	2.4	Piaggio Group	2.4
Harley Davidson	4.8	Suzuki	3.5
Honda	2.4	Triumph	4.0
Kawasaki	3.8	Yamaha	3.9
KTM	4.2		
Kymco	4.5	AVERAGE	3.3

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2016 SURVEY

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



PREVIOUS SURVEY RESULTS – AUTUMN 2015

18: Overall, how do you rate the value of holding your motorcycle franchise			
BMW	5.4	Lexmoto	7.9
Ducati	6.0	Piaggio Group	5.2
Harley Davidson	9.5	Suzuki	7.1
Honda	4.7	Triumph	7.8
Kawasaki	8.3	Yamaha	7.6
KTM	8.6		
Kymco	7.9	AVERAGE	6.6

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2016 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	4.5	KTM	3.6	Kymco	4.1	KTM	3.1
Lexmoto	4.3	Suzuki	3.6	Harley Davidson	4.0	Piaggio Group	2.9
BMW	4.1	Kymco	3.5	BMW	3.6	Ducati	2.8
Yamaha	4.1	Honda	3.3	Lexmoto	3.6	Triumph	2.8
Ducati	3.8	Piaggio Group	2.9	Suzuki	3.5	Honda	2.4
Kawasaki	3.7			Yamaha	3.3		
Triumph	3.7	Average	3.7	Kwasaki	3.2	Average	3.1

7a: Your manufacturer's policy for the supply and stocking of motorcycles				7b: The new motorcycle target negotiating process			
Harley Davidson	4.5	Yamaha	3.2	Kymco	4.4	Kawasaki	2.8
Lexmoto	4.1	Suzuki	2.9	Harley Davidson	3.8	Piaggio Group	2.8
Kymco	4.0	Triumph	2.8	Lexmoto	3.8	Ducati	2.7
BMW	3.8	Honda	2.7	BMW	3.2	Triumph	2.4
Kawasaki	3.6	Piaggio Group	2.7	Suzuki	3.1	Honda	2.1
Ducati	3.5			Yamaha	3.1		
KTM	3.5	Average	3.2	KTM	2.9	Average	2.9

7c: What is your annual target for this brand				8a: The brand image			
BMW	259.4	Kawasaki	129.6	Harley Davidson	5.0	Honda	3.9
Honda	234.3	Piaggio Group	108.5	BMW	4.6	Lexmoto	3.9
KTM	211.0	Lexmoto	95.0	Ducati	4.5	Kymco	3.8
Harley Davidson	198.0	Suzuki	75.6	KTM	4.3	Suzuki	3.5
Yamaha	167.6	Kymco	56.0	Triumph	4.3	Piaggio Group	3.3
Ducati	157.6			Yamaha	4.1		
Triumph	156.4	Average	177.3	Kawasaki	4.0	Average	4.0

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2016 SURVEY

8b: The product image				8c: Frequency of introduction of new models			
Harley Davidson	5.0	Lexmoto	3.9	Ducati	4.8	KTM	3.4
BMW	4.5	Honda	3.8	BMW	4.5	Honda	3.3
Ducati	4.5	Kymco	3.8	Yamaha	4.4	Kymco	3.0
Triumph	4.2	Piaggio Group	3.3	Triumph	4.3	Piaggio Group	2.6
Yamaha	4.1	Suzuki	3.3	Honda	4.1	Suzuki	2.4
KTM	4.0			Harley Davidson	4.0		
Kawasaki	3.9	Average	3.9	Lexmoto	3.8	Average	3.7

8d: Retail sales incentives and promotions				8e: Product advertising			
Harley Davidson	4.0	Lexmoto	3.6	Harley Davidson	4.5	Kawasaki	3.5
KTM	3.9	Kymco	3.5	Lexmoto	3.9	Yamaha	3.5
Suzuki	3.9	Yamaha	3.5	Triumph	3.9	Kymco	3.0
BMW	3.8	Honda	2.9	Ducati	3.8	Honda	2.8
Kawasaki	3.8	Piaggio Group	2.6	Suzuki	3.8	Piaggio Group	2.4
Triumph	3.8			KTM	3.6		
Ducati	3.7	Average	3.5	BMW	3.5	Average	3.3

8f: Have a comprehensive accessory offering that appeals to customers				8g: Have a comprehensive clothing offering that appeals to customers			
Harley Davidson	5.0	Lexmoto	3.6	Harley Davidson	4.8	Lexmoto	3.0
KTM	4.6	Kawasaki	3.4	KTM	4.4	Kawasaki	2.6
Triumph	4.4	Kymco	2.8	Ducati	4.2	Kymco	2.3
Ducati	4.3	Piaggio Group	2.7	BMW	4.0	Piaggio Group	2.2
BMW	4.1	Honda	2.2	Triumph	4.0	Honda	1.8
Yamaha	4.0			Suzuki	3.7		
Suzuki	3.8	Average	3.5	Yamaha	3.4	Average	3.1

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2016 SURVEY

9: Your manufacturer's warranty policy				10: What is your labour rate for retail before VAT (£)			
BMW	4.3	Triumph	3.3	BMW	81.5	Piaggio Group	53.1
Harley Davidson	4.3	Honda	3.0	Harley Davidson	77.0	Kawasaki	52.3
Lexmoto	4.0	KTM	3.0	Ducati	59.5	KTM	48.9
Kawasaki	3.8	Ducati	2.7	Triumph	58.1	Kymco	47.8
Suzuki	3.6	Piaggio Group	2.4	Honda	54.3	Lexmoto	39.1
Yamaha	3.5			Yamaha	53.6		
Kymco	3.3	Average	3.4	Suzuki	53.5	Average	57.0

11: What is your labour rate for warranty before VAT (£)				12a: Warranty labour rate			
Harley Davidson	77.0	Yamaha	39.0	Harley Davidson	4.8	Ducati	2.8
BMW	63.8	KTM	38.9	Kawasaki	4.1	Honda	2.8
Triumph	54.1	Piaggio Group	35.2	BMW	3.8	Piaggio Group	2.5
Kawasaki	52.3	Lexmoto	27.8	Triumph	3.5	Kymco	2.4
Honda	45.0	Kymco	22.4	KTM	3.1	Lexmoto	1.9
Ducati	43.3			Suzuki	3.1		
Suzuki	42.8	Average	45.6	Yamaha	2.9	Average	3.1

12b: Warranty replacement parts policy				12c: Warranty time allowances			
BMW	3.3	Lexmoto	2.6	Kymco	4.5	Suzuki	3.3
Kawasaki	3.3	Triumph	2.6	BMW	4.2	Triumph	3.3
Yamaha	3.0	Honda	2.3	Yamaha	4.1	Honda	3.2
KTM	2.9	Ducati	2.2	Kawasaki	4.0	Ducati	3.0
Harley Davidson	2.8	Piaggio Group	2.2	Lexmoto	4.0	Piaggio Group	2.9
Kymco	2.8			Harley Davidson	3.5		
Suzuki	2.8	Average	2.7	KTM	3.5	Average	3.6

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2016 SURVEY

12d: Timely and fair settlement of warranty claims				12e: Quality and availability of technical support			
Lexmoto	4.3	Suzuki	3.9	Kawasaki	4.5	Honda	3.2
BMW	4.2	Triumph	3.9	Kymco	4.3	Lexmoto	3.1
Kawasaki	4.2	Honda	3.7	BMW	4.0	Ducati	3.0
Yamaha	4.1	Ducati	3.6	Suzuki	3.9	Harley Davidson	2.5
Harley Davidson	4.0	Piaggio Group	2.6	KTM	3.8	Piaggio Group	2.4
KTM	3.9			Yamaha	3.7		
Kymco	3.9	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	4.8	KTM	3.3	Harley Davidson	4.3	Kymco	3.5
Triumph	3.8	Yamaha	3.3	BMW	3.8	Lexmoto	3.5
BMW	3.7	Suzuki	3.0	Ducati	3.8	Suzuki	3.3
Kymco	3.6	Piaggio Group	2.8	Triumph	3.7	Piaggio Group	3.2
Lexmoto	3.4	Honda	2.5	KTM	3.6	Honda	2.8
Ducati	3.3			Yamaha	3.6		
Kawasaki	3.3	Average	3.2	Kawasaki	3.5	Average	3.4

14b: Your stocking plan for this franchise				15a: The dealer standards expected by your manufacturer			
Harley Davidson	4.5	Yamaha	3.5	Harley Davidson	4.3	KTM	3.0
KTM	4.0	Suzuki	3.4	Kymco	4.3	Piaggio Group	3.0
BMW	3.9	Triumph	3.2	Lexmoto	3.4	Triumph	2.8
Ducati	3.6	Honda	3.0	Suzuki	3.3	Kawasaki	2.4
Kawasaki	3.6	Piaggio Group	2.9	Yamaha	3.3	Honda	1.9
Kymco	3.6			BMW	3.2		
Lexmoto	3.5	Average	3.4	Ducati	3.1	Average	2.9

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2016 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			
Kymco	4.3	KTM	2.9	Harley Davidson	4.5	Triumph	3.3
Harley Davidson	4.0	Piaggio Group	2.9	Kymco	3.8	Yamaha	3.3
Lexmoto	3.1	Triumph	2.9	BMW	3.7	Ducati	2.9
BMW	3.0	Kawasaki	2.6	Lexmoto	3.5	Honda	2.6
Suzuki	3.0	Honda	1.9	Kawasaki	3.4	Piaggio Group	2.2
Yamaha	3.0			KTM	3.4		
Ducati	2.9	Average	2.8	Suzuki	3.3	Average	3.1

16b: The effectiveness of your field sales team				16c: The effectiveness of the field service and parts staff			
Harley Davidson	5.0	Kawasaki	3.5	Harley Davidson	4.8	Ducati	3.3
BMW	4.0	Suzuki	3.5	Kymco	4.5	Honda	3.0
KTM	4.0	Lexmoto	3.3	BMW	3.9	Lexmoto	2.8
Kymco	4.0	Honda	3.1	Kawasaki	3.9	Triumph	2.8
Ducati	3.8	Piaggio Group	3.0	KTM	3.8	Piaggio Group	2.6
Triumph	3.7			Suzuki	3.8		
Yamaha	3.6	Average	3.5	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			
Harley Davidson	4.8	Yamaha	3.7	Harley Davidson	4.3	KTM	3.0
Ducati	4.2	Honda	3.6	BMW	3.6	Yamaha	2.8
BMW	4.0	Kawasaki	3.6	Ducati	3.5	Lexmoto	2.3
Kymco	4.0	Lexmoto	3.0	Kawasaki	3.3	Triumph	2.2
Suzuki	4.0	Piaggio Group	2.7	Kymco	3.3	Piaggio Group	1.8
KTM	3.9			Suzuki	3.1		
Triumph	3.8	Average	3.7	Honda	3.0	Average	3.1

NMDA DEALER ATTITUDE SURVEY - RESULTS OF THE SPRING 2016 SURVEY

17a: The routine procedures and controls expected				17b: The quality of your manufacturer's training			
Harley Davidson	4.5	Triumph	3.4	Harley Davidson	4.5	KTM	3.4
Kymco	4.0	Ducati	3.3	BMW	4.2	Harley Davidson	3.1
BMW	3.8	Kawasaki	3.1	Kawasaki	3.8	Kymco	3.0
KTM	3.6	Piaggio Group	2.7	Yamaha	3.8	Lexmoto	2.8
Lexmoto	3.6	Honda	2.2	Ducati	3.7	Piaggio Group	2.2
Yamaha	3.6			Suzuki	3.6		
Suzuki	3.5	Average	3.2	Triumph	3.6	Average	3.5

17c: The cost of your manufacturer's training				17d: Your ability to do business with your manufacturer on a day-to-day basis			
Harley Davidson	4.3	Ducati	3.1	Harley Davidson	4.8	Yamaha	3.6
KTM	4.1	Kymco	3.0	Kymco	4.6	Triumph	3.5
Suzuki	3.8	Lexmoto	3.0	Lexmoto	4.1	Ducati	3.3
Triumph	3.8	Honda	2.8	KTM	4.0	Honda	2.5
Yamaha	3.8	Piaggio Group	2.5	BMW	3.8	Piaggio Group	2.4
BMW	3.4			Suzuki	3.8		
Kawasaki	3.2	Average	3.3	Kawasaki	3.6	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			
Honda	5.0	Yamaha	3.6	Harley Davidson	9.8	KTM	7.1
BMW	4.0	Ducati	3.5	Lexmoto	8.0	Kawasaki	7.0
KTM	3.9	Triumph	3.2	BMW	7.9	Suzuki	6.0
Kymco	3.8	Honda	3.1	Kymco	7.8	Piaggio Group	5.1
Lexmoto	3.8	Piaggio Group	2.5	Triumph	7.4	Honda	4.9
Suzuki	3.7			Yamaha	7.3		
Kawasaki	3.6	Average	3.5	Ducati	7.2	Average	6.6