



**National Franchised  
Dealers Association**

# **Dealer Attitude Survey**

**Summer 2023**

**Brand Performance Summary**

# DAS Brand Performance Summary

**New for the Summer 2023 edition** are the inclusion of Manufacturer Summaries to enable a fast and efficient overview of each brand’s franchise ratings.

In addition to ‘Overall Brand Rating’ taken from Question 12, the summaries include ‘**Top 6 and Bottom 6**’ visuals for each manufacturer when compared to the survey average - this enables a quick summary of strong performance areas and those needing potential focus for improvement.

For those looking for **additional manufacturer analysis**, a ‘**Brand Deep Dive**’ pack is available together with custom data analysis services via our analytics partner. Please contact **Metryx** directly at [nfda@metryx.co.uk](mailto:nfda@metryx.co.uk) for further information.

Abarth	3 - 5	Lexus	51 - 53
Alfa Romeo	6 - 8	Mazda	54 - 56
Audi	9 - 11	Mercedes-Benz	57 - 59
BMW	12 - 14	MG	60 - 62
Citroen	15 - 17	MINI	63 - 65
Cupra	18 - 20	Nissan	66 - 68
Dacia	21 - 23	Peugeot	69 - 71
DS	24 - 26	Renault	72 - 74
Fiat	27 - 29	Seat	75 - 77
Ford	30 - 32	Skoda	78 - 80
Honda	33 - 35	Subaru	81 - 83
Hyundai	36 - 38	Suzuki	84 - 86
Jaguar	39 - 41	Toyota	87 - 89
Jeep	42 - 44	Vauxhall	90 - 92
Kia	45 - 47	Volkswagen	93 - 95
Land Rover	48 - 50	Volvo	96 - 98

## Overall Manufacturer Rating

Q12: How would you rate your manufacturer overall on a scale of 1 to 10?

Winter 2022

4.2

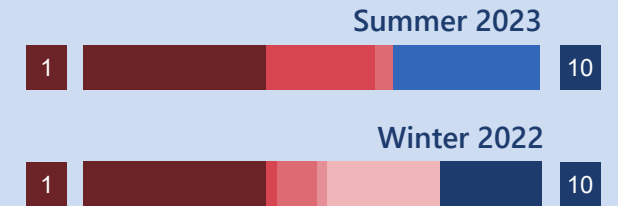
Summer 2023

3.9

Ranking vs. Winter 22  
24 vs. 24

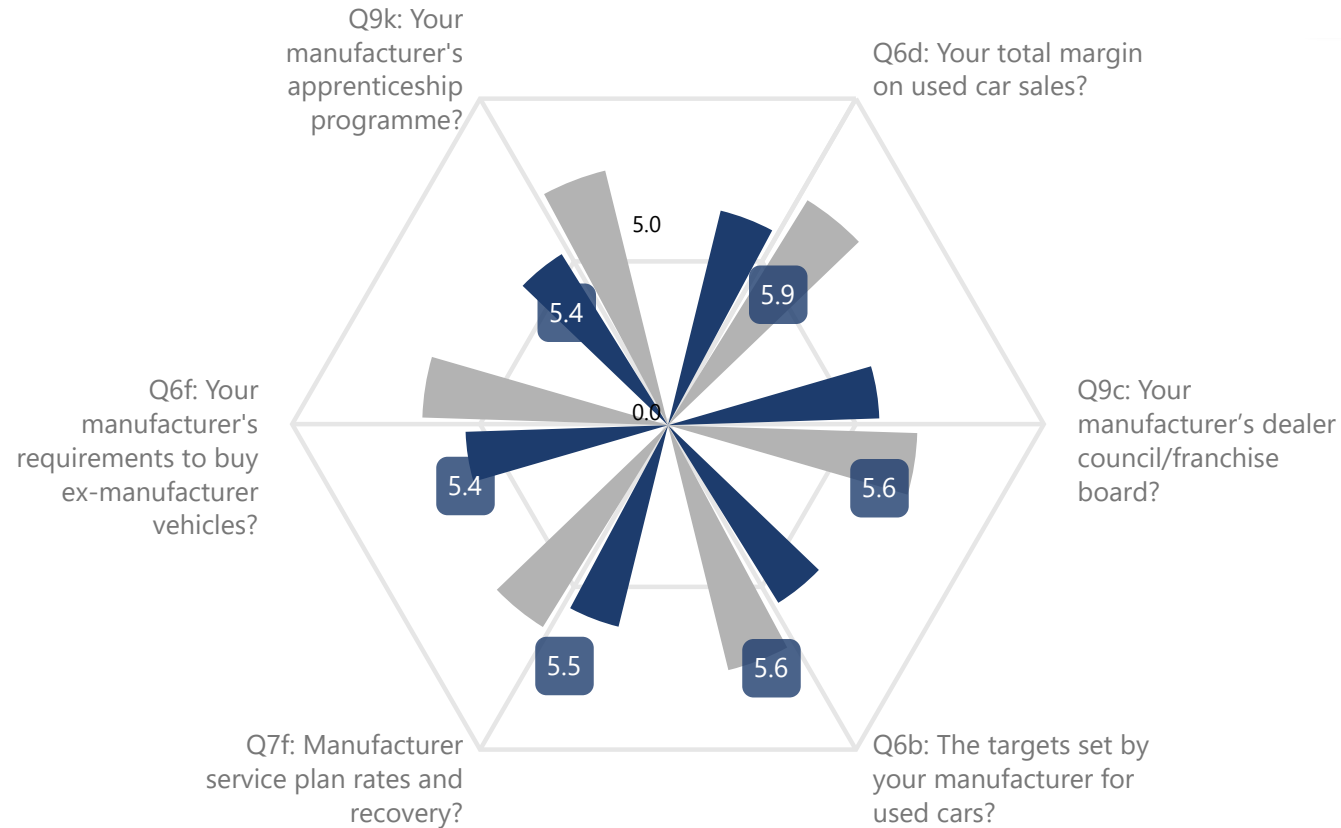
% Change  
-7.1%

Score Change  
-0.3 pts



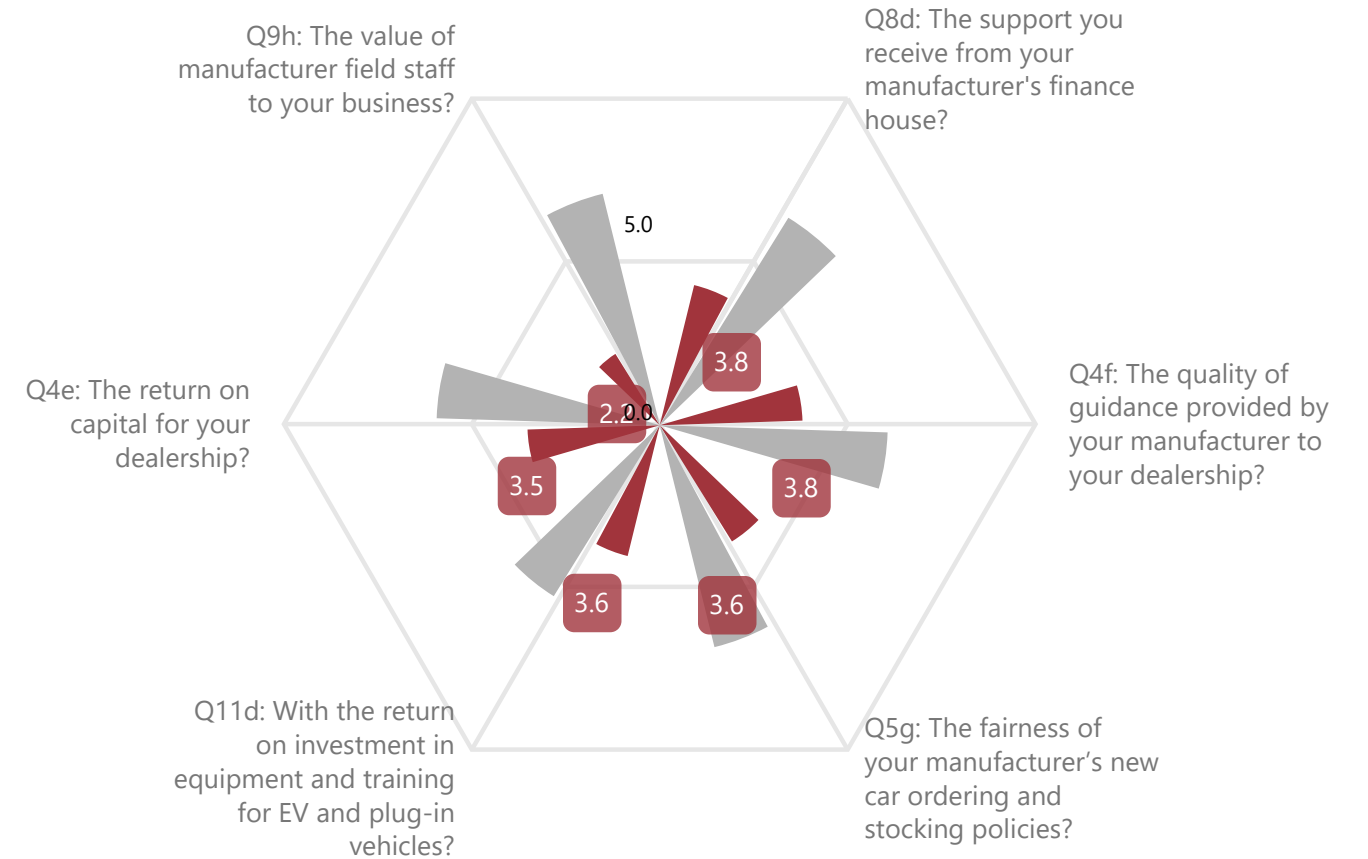
## Top 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



## Bottom 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



Question 4 - Value of the franchise	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	4.2	3.9	-0.3	-2.3
Q4b: The future profit return from representing your franchise?	4.4	4.5	+0.1	-1.3
Q4c: The required level of capital investment?	5.1	4.1	-1.0	-2.0
Q4d: The cost required in your dealership to meet franchised standards?	5.1	5.0	-0.1	-1.0
Q4e: The return on capital for your dealership?	4.5	3.5	-1.0	-2.4
Q4f: The quality of guidance provided by your manufacturer to your dealership?	4.3	3.8	-0.5	-2.3
Q4g: The financial support available to your dealership from your manufacturer?	3.8	3.9	+0.1	-1.7

Question 5 - New car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	4.3	5.0	+0.7	-1.2
Q5b: Your new car targeting process?	3.9	4.4	+0.5	-1.6
Q5c: Your total margin on new vehicles?	5.0	4.2	-0.8	-1.9
Q5d: Your current bonus and rebate rates on new car sales?	4.1	4.3	+0.2	-1.7
Q5e: Manufacturer inducement to self register vehicles?	5.0	5.0	0.0	-1.2
Q5f: Manufacturer's new vehicle supply?	3.4	3.9	+0.5	-1.7
Q5g: The fairness of your manufacturer's new car ordering and stocking policies?	4.1	3.6	-0.5	-2.4
Q5h: The fairness of your manufacturer's demonstrator programme?	4.9	5.1	+0.2	-1.3

Question 6 - Used car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	4.5	4.9	+0.4	-2.2
Q6b: The targets set by your manufacturer for used cars?	5.1	5.6	+0.5	-1.1
Q6c: The cost and quality of your manufacturer's used car warranties?	4.3	4.8	+0.5	-1.8
Q6d: Your total margin on used car sales?	4.9	5.9	+1.0	-1.2
Q6e: Your manufacturer's used car programme?	4.3	4.7	+0.4	-2.1
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	5.2	5.4	+0.2	-1.2

Question 7 - Aftersales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	4.5	5.2	+0.7	-1.2
Q7b: Quality of technical support?	5.8	4.9	-0.9	-1.4
Q7c: Availability of parts?	5.0	4.9	-0.1	-0.8
Q7d: Price of manufacturer parts compared with parts factors?	4.8	4.7	-0.1	-1.1
Q7e: Service profitability earnings?	5.0	5.2	+0.2	-1.2
Q7f: Manufacturer service plan rates and recovery?	4.1	5.5	+1.4	-0.8
Q7g: The fairness of your manufacturer's warranty policy for you and your cust...	5.4	4.1	-1.3	-2.5
Q7h: Your manufacturer's stocking policy for parts/accessories?	5.4	5.0	-0.4	-1.6

### Question 8 - Finance

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	4.9	4.0	-0.9	-2.4
Q8b: The reasonableness of the finance targets set by your manufacturer?	4.8	4.0	-0.8	-2.7
Q8c: The earnings potential of your manufacturer's finance programme?	5.0	4.0	-1.0	-1.9
Q8d: The support you receive from your manufacturer's finance house?	5.0	3.8	-1.2	-2.7

### Question 9 - Dealer/Manufacturer relationships

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	4.3	4.7	+0.4	-1.8
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	4.2	5.0	+0.8	-1.2
Q9c: Your manufacturer's dealer council/franchise board?	4.5	5.6	+1.1	-1.0
Q9d: Your manufacturer's response to your communications with them?	3.9	5.2	+1.3	-1.2
Q9e: Your manufacturer dealer standards are fair and reasonable?	4.3	4.8	+0.5	-1.8
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	4.0	4.7	+0.7	-1.5
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	4.2	4.8	+0.6	-1.5
Q9h: The value of manufacturer field staff to your business?	4.4	2.2	-2.2	-4.1
Q9i: The quality of your manufacturer's training?	4.5	4.7	+0.2	-2.2
Q9j: The cost of manufacturer's training?	4.4	4.1	-0.3	-2.2
Q9k: Your manufacturer's apprenticeship programme?	4.4	5.4	+1.0	-1.6
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	3.9	4.1	+0.2	-1.9

### Question 10 - Product and marketing

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q10a: Frequency of introduction of new models?	3.4	4.4	+1.0	-2.2
Q10b: Product value and pricing?	4.4	4.5	+0.1	-2.0
Q10c: Product advertising?	4.1	4.2	+0.1	-2.2

### Question 11 - Electric vehicle/Plug-in vehicles

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q11a: Battery Electric Vehicle products your manufacturer currently offers?	4.0	4.8	+0.8	-1.1
Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	5.0	5.1	+0.1	-1.5
Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	4.1	4.8	+0.7	-1.5
Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	4.1	3.6	-0.5	-1.8
Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	4.1	4.1	0.0	-1.1
Q11f: With your manufacturer's support with on-site EV charging infrastructure?		3.9	-	-1.0

### Question 12 & 13 - Overall Rating

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	4.2	3.9	-0.3	-2.4
Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	4.1	4.4	+0.3	-2.0

## Overall Manufacturer Rating

Q12: How would you rate your manufacturer overall on a scale of 1 to 10?

Winter 2022

4.5

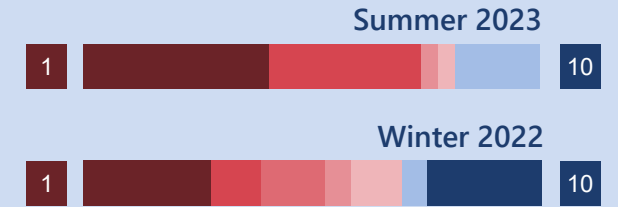
Summer 2023

2.5

Ranking vs. Winter 22  
**29 vs. 23**

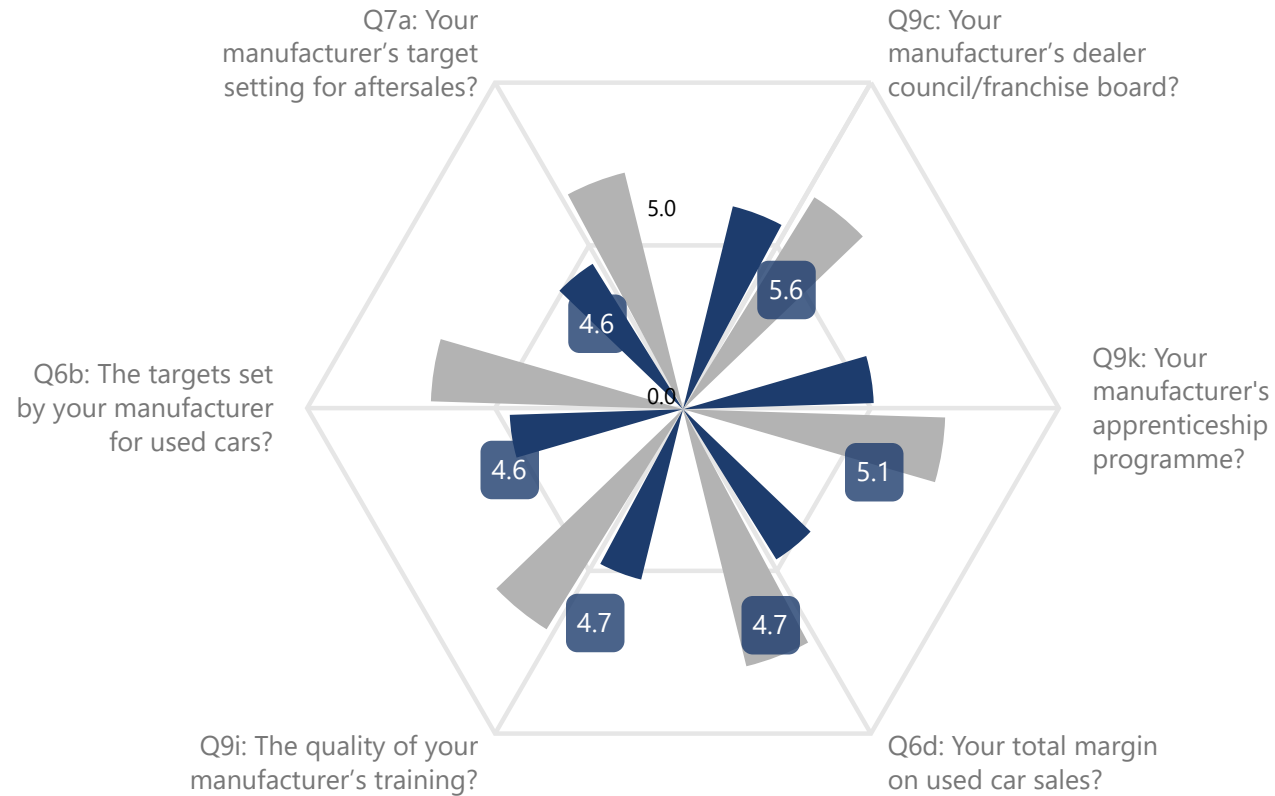
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**-44.4%**

Score Change  
**-2.0 pts**



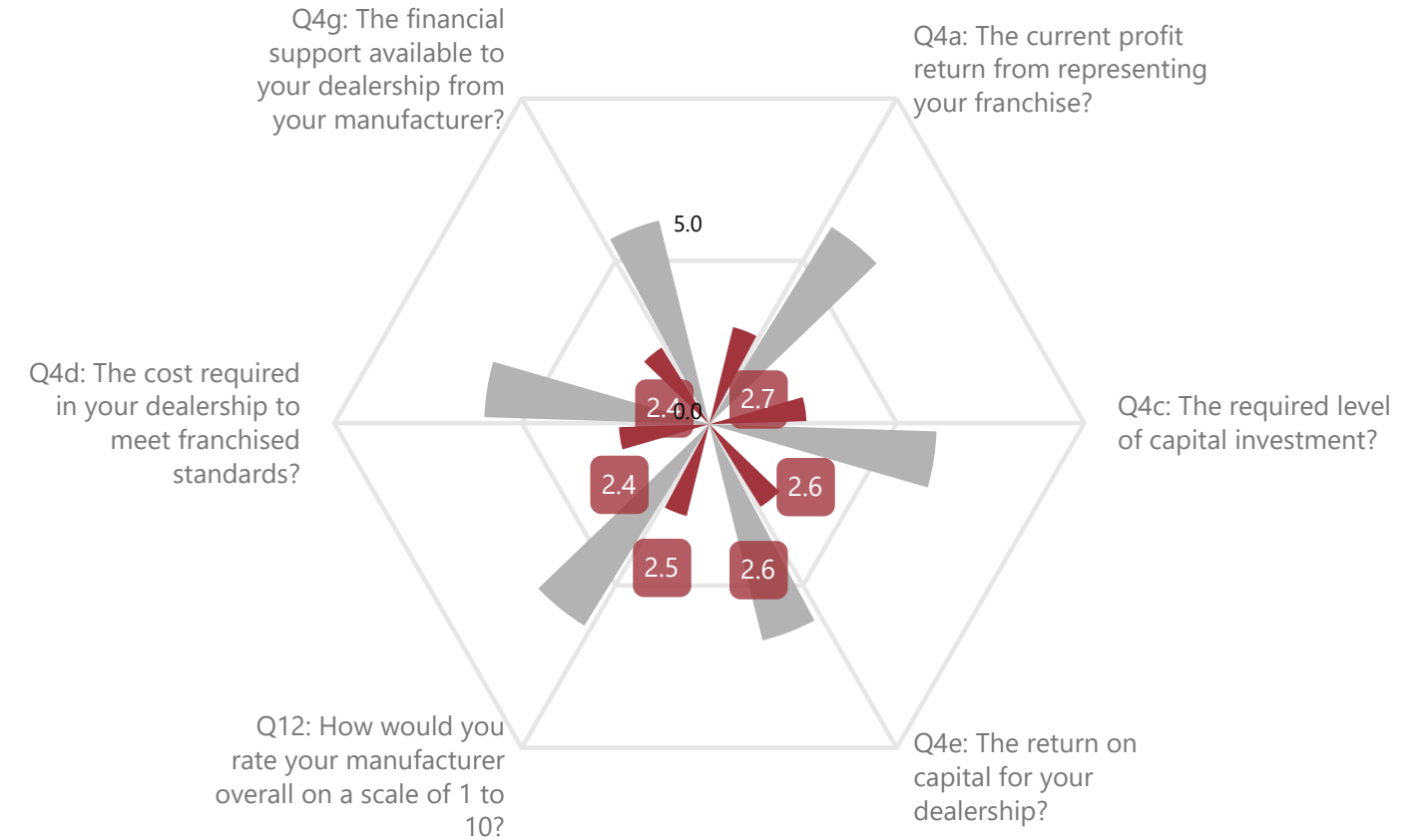
### Top 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



### Bottom 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



Question 4 - Value of the franchise	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	3.8	2.7	-1.1	-3.5
Q4b: The future profit return from representing your franchise?	4.7	2.8	-1.9	-3.0
Q4c: The required level of capital investment?	4.9	2.6	-2.3	-3.5
Q4d: The cost required in your dealership to meet franchised standards?	5.0	2.4	-2.6	-3.6
Q4e: The return on capital for your dealership?	3.7	2.6	-1.1	-3.3
Q4f: The quality of guidance provided by your manufacturer to your dealership?	4.2	2.7	-1.5	-3.3
Q4g: The financial support available to your dealership from your manufacturer?	4.0	2.4	-1.6	-3.2

Question 5 - New car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	4.6	4.0	-0.6	-2.2
Q5b: Your new car targeting process?	4.8	3.9	-0.9	-2.1
Q5c: Your total margin on new vehicles?	5.8	3.6	-2.2	-2.5
Q5d: Your current bonus and rebate rates on new car sales?	5.0	3.0	-2.0	-3.0
Q5e: Manufacturer inducement to self register vehicles?	5.2	3.3	-1.9	-2.9
Q5f: Manufacturer's new vehicle supply?	4.5	3.9	-0.6	-1.7
Q5g: The fairness of your manufacturer's new car ordering and stocking policies?	4.9	2.9	-2.0	-3.2
Q5h: The fairness of your manufacturer's demonstrator programme?	6.5	3.8	-2.7	-2.6

Question 6 - Used car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	5.0	3.2	-1.8	-3.9
Q6b: The targets set by your manufacturer for used cars?	8.7	4.6	-4.1	-2.1
Q6c: The cost and quality of your manufacturer's used car warranties?	5.6	3.3	-2.3	-3.3
Q6d: Your total margin on used car sales?	5.8	4.7	-1.1	-2.3
Q6e: Your manufacturer's used car programme?	5.5	3.4	-2.1	-3.4
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	8.3	3.5	-4.8	-3.1

Question 7 - Aftersales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	5.7	4.6	-1.1	-1.9
Q7b: Quality of technical support?	6.6	3.3	-3.3	-3.0
Q7c: Availability of parts?	5.0	3.2	-1.8	-2.5
Q7d: Price of manufacturer parts compared with parts factors?	4.9	3.1	-1.8	-2.6
Q7e: Service profitability earnings?	5.3	4.0	-1.3	-2.4
Q7f: Manufacturer service plan rates and recovery?	4.6	3.7	-0.9	-2.6
Q7g: The fairness of your manufacturer's warranty policy for you and your cust...	6.6	3.7	-2.9	-2.9
Q7h: Your manufacturer's stocking policy for parts/accessories?	6.7	4.1	-2.6	-2.5

## Question 8 - Finance

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	5.5	3.4	-2.1	-3.1
Q8b: The reasonableness of the finance targets set by your manufacturer?	6.5	3.6	-2.9	-3.2
Q8c: The earnings potential of your manufacturer's finance programme?	5.6	3.3	-2.3	-2.7
Q8d: The support you receive from your manufacturer's finance house?	6.8	3.5	-3.3	-3.0

## Question 9 - Dealer/Manufacturer relationships

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	5.6	4.0	-1.6	-2.6
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	4.9	3.4	-1.5	-2.8
Q9c: Your manufacturer's dealer council/franchise board?	5.8	5.6	-0.2	-1.1
Q9d: Your manufacturer's response to your communications with them?	5.1	3.6	-1.5	-2.8
Q9e: Your manufacturer dealer standards are fair and reasonable?	5.2	3.5	-1.7	-3.0
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	4.2	3.5	-0.7	-2.7
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	5.4	3.3	-2.1	-3.0
Q9h: The value of manufacturer field staff to your business?	5.5	2.7	-2.8	-3.7
Q9i: The quality of your manufacturer's training?	5.6	4.7	-0.9	-2.2
Q9j: The cost of manufacturer's training?	5.4	3.8	-1.6	-2.5
Q9k: Your manufacturer's apprenticeship programme?	6.2	5.1	-1.1	-1.9
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	5.6	3.2	-2.4	-2.8

## Question 10 - Product and marketing

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q10a: Frequency of introduction of new models?	3.7	3.7	0.0	-3.0
Q10b: Product value and pricing?	3.9	3.9	0.0	-2.7
Q10c: Product advertising?	3.6	3.6	0.0	-2.8

## Question 11 - Electric vehicle/Plug-in vehicles

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q11a: Battery Electric Vehicle products your manufacturer currently offers?	3.8	3.3	-0.5	-2.6
Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	4.6	3.5	-1.1	-3.1
Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	4.8	3.7	-1.1	-2.6
Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	5.1	3.2	-1.9	-2.2
Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	4.7	3.1	-1.6	-2.1
Q11f: With your manufacturer's support with on-site EV charging infrastructure?		2.9	-	-2.0

## Question 12 & 13 - Overall Rating

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	4.5	2.5	-2.0	-3.8
Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	4.6	2.7	-1.9	-3.7



## Overall Manufacturer Rating

Q12: How would you rate your manufacturer overall on a scale of 1 to 10?

Winter 2022

5.0

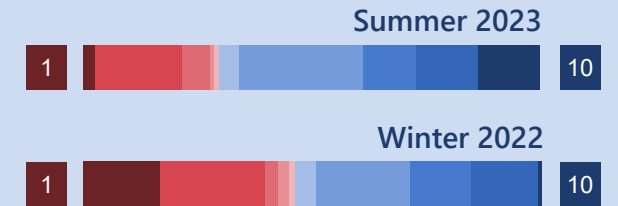
Summer 2023

6.3

Ranking vs. Winter 22  
15 vs. 22

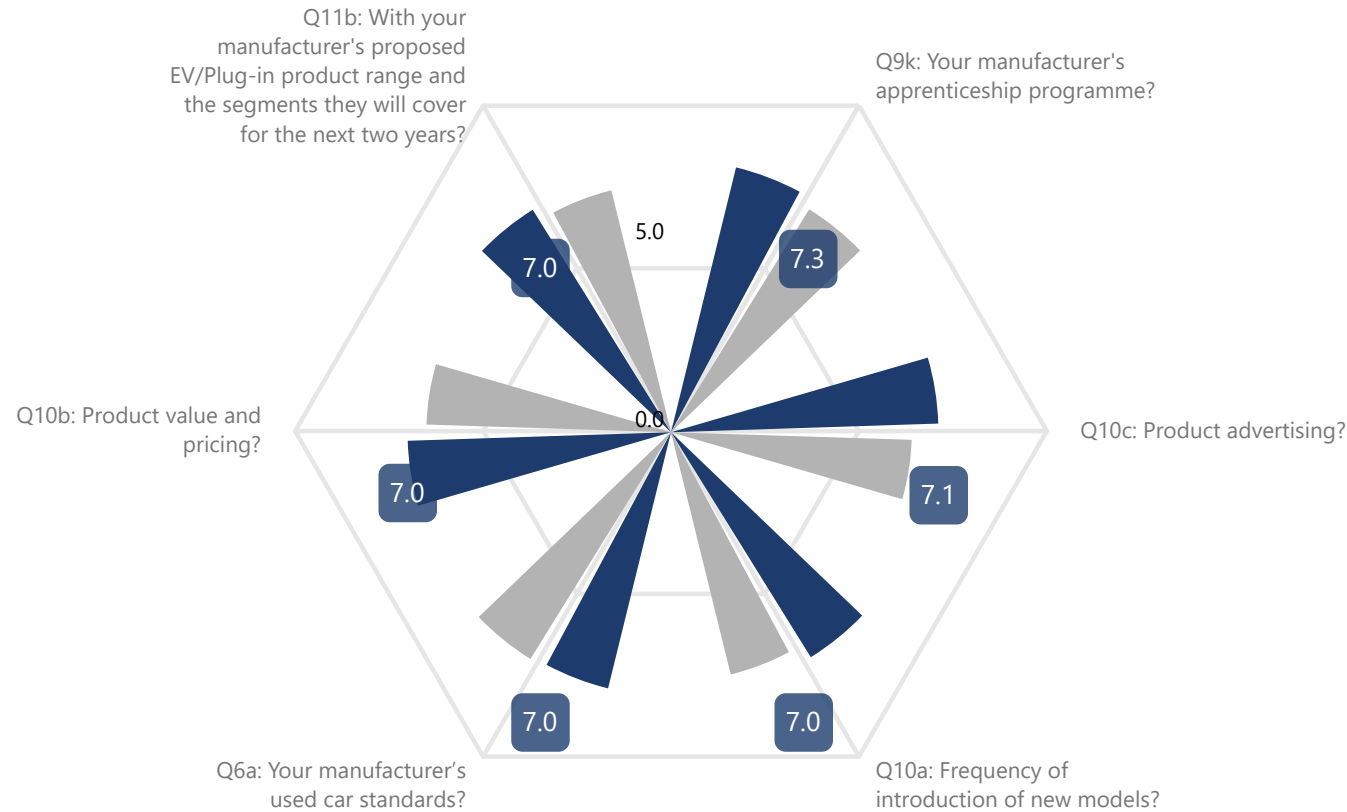
% Change  
**+26.0%**

Score Change  
**+1.3 pts**



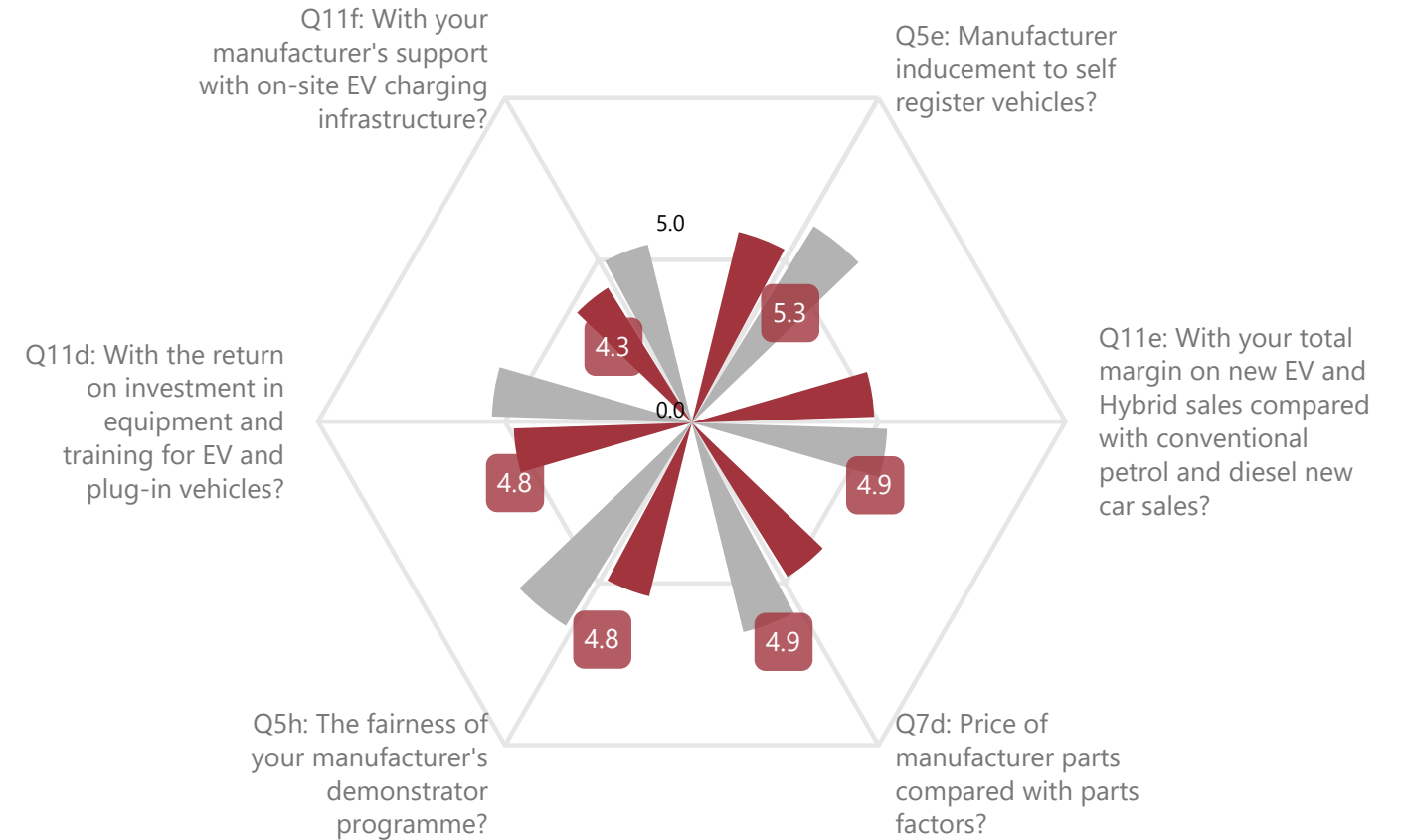
### Top 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



### Bottom 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



Question 4 - Value of the franchise	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	7.9	6.9	-1.0	+0.7
Q4b: The future profit return from representing your franchise?	5.0	5.3	+0.3	-0.5
Q4c: The required level of capital investment?	5.7	5.9	+0.2	-0.2
Q4d: The cost required in your dealership to meet franchised standards?	5.6	5.5	-0.1	-0.5
Q4e: The return on capital for your dealership?	6.7	5.9	-0.8	-0.0
Q4f: The quality of guidance provided by your manufacturer to your dealership?	4.6	6.0	+1.4	-0.0
Q4g: The financial support available to your dealership from your manufacturer?	4.6	5.8	+1.2	+0.3

Question 5 - New car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	5.3	5.7	+0.4	-0.5
Q5b: Your new car targeting process?	4.7	5.4	+0.7	-0.6
Q5c: Your total margin on new vehicles?	5.6	5.8	+0.2	-0.3
Q5d: Your current bonus and rebate rates on new car sales?	5.2	6.2	+1.0	+0.2
Q5e: Manufacturer inducement to self register vehicles?	4.5	5.3	+0.8	-0.9
Q5f: Manufacturer's new vehicle supply?	4.7	5.3	+0.6	-0.2
Q5g: The fairness of your manufacturer's new car ordering and stocking policies?	4.8	5.7	+0.9	-0.3
Q5h: The fairness of your manufacturer's demonstrator programme?	4.6	4.8	+0.2	-1.6

Question 6 - Used car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	6.6	7.0	+0.4	-0.1
Q6b: The targets set by your manufacturer for used cars?	5.0	5.7	+0.7	-1.0
Q6c: The cost and quality of your manufacturer's used car warranties?	6.3	6.1	-0.2	-0.5
Q6d: Your total margin on used car sales?	6.5	5.9	-0.6	-1.2
Q6e: Your manufacturer's used car programme?	6.1	6.5	+0.4	-0.3
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	4.8	5.6	+0.8	-0.9

Question 7 - Aftersales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	5.6	6.5	+0.9	+0.0
Q7b: Quality of technical support?	4.8	5.7	+0.9	-0.5
Q7c: Availability of parts?	4.6	5.3	+0.7	-0.5
Q7d: Price of manufacturer parts compared with parts factors?	4.1	4.9	+0.8	-0.9
Q7e: Service profitability earnings?	5.4	6.3	+0.9	-0.2
Q7f: Manufacturer service plan rates and recovery?	5.7	5.6	-0.1	-0.7
Q7g: The fairness of your manufacturer's warranty policy for you and your cust...	6.1	6.3	+0.2	-0.3
Q7h: Your manufacturer's stocking policy for parts/accessories?	6.0	6.1	+0.1	-0.5

### Question 8 - Finance

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	5.3	6.5	+1.2	+0.1
Q8b: The reasonableness of the finance targets set by your manufacturer?	5.8	6.9	+1.1	+0.1
Q8c: The earnings potential of your manufacturer's finance programme?	5.9	6.9	+1.0	+1.0
Q8d: The support you receive from your manufacturer's finance house?	4.4	6.5	+2.1	-0.0

### Question 9 - Dealer/Manufacturer relationships

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	5.0	6.4	+1.4	-0.2
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	4.6	5.7	+1.1	-0.4
Q9c: Your manufacturer's dealer council/franchise board?	5.8	6.4	+0.6	-0.2
Q9d: Your manufacturer's response to your communications with them?	4.6	6.1	+1.5	-0.3
Q9e: Your manufacturer dealer standards are fair and reasonable?	5.3	6.2	+0.9	-0.3
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	4.6	6.0	+1.4	-0.2
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	5.1	6.4	+1.3	+0.0
Q9h: The value of manufacturer field staff to your business?	4.7	6.3	+1.6	-0.0
Q9i: The quality of your manufacturer's training?	5.9	6.8	+0.9	-0.1
Q9j: The cost of manufacturer's training?	5.2	6.0	+0.8	-0.3
Q9k: Your manufacturer's apprenticeship programme?	7.1	7.3	+0.2	+0.3
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	4.4	5.6	+1.2	-0.4

### Question 10 - Product and marketing

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q10a: Frequency of introduction of new models?	6.2	7.0	+0.8	+0.4
Q10b: Product value and pricing?	5.9	7.0	+1.1	+0.5
Q10c: Product advertising?	6.0	7.1	+1.1	+0.7

### Question 11 - Electric vehicle/Plug-in vehicles

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q11a: Battery Electric Vehicle products your manufacturer currently offers?	5.7	6.4	+0.7	+0.5
Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	6.4	7.0	+0.6	+0.3
Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	5.9	6.5	+0.6	+0.1
Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	4.9	4.8	-0.1	-0.6
Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	4.4	4.9	+0.5	-0.3
Q11f: With your manufacturer's support with on-site EV charging infrastructure?		4.3	-	-0.7

### Question 12 & 13 - Overall Rating

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	5.0	6.3	+1.3	+0.0
Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	5.2	6.9	+1.7	+0.4

## Overall Manufacturer Rating

Q12: How would you rate your manufacturer overall on a scale of 1 to 10?

Winter 2022

8.6

Summer 2023

8.7

Ranking vs. Winter 22  
4 vs. 5

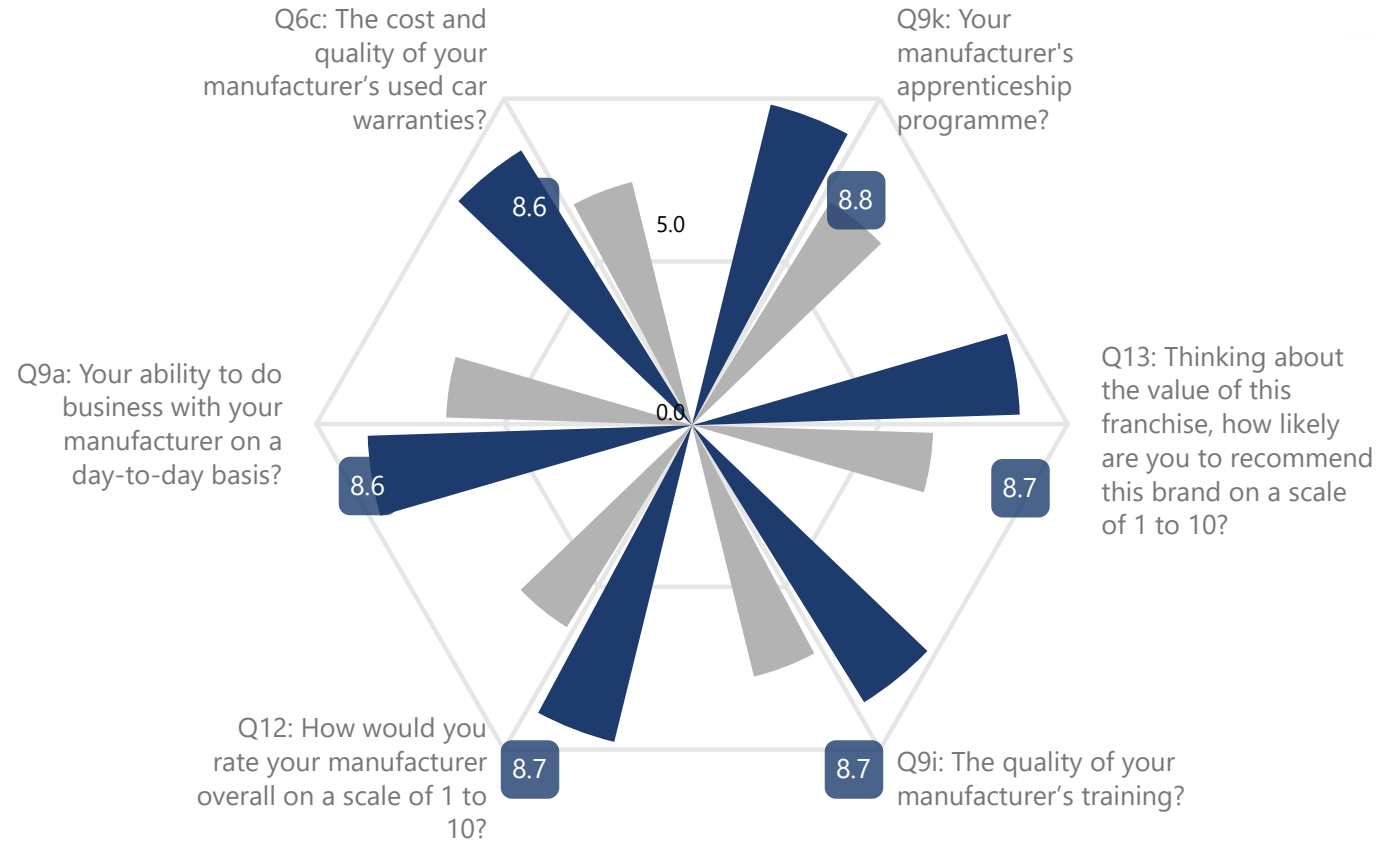
% Change  
**+1.2%**

Score Change  
**+0.1 pts**



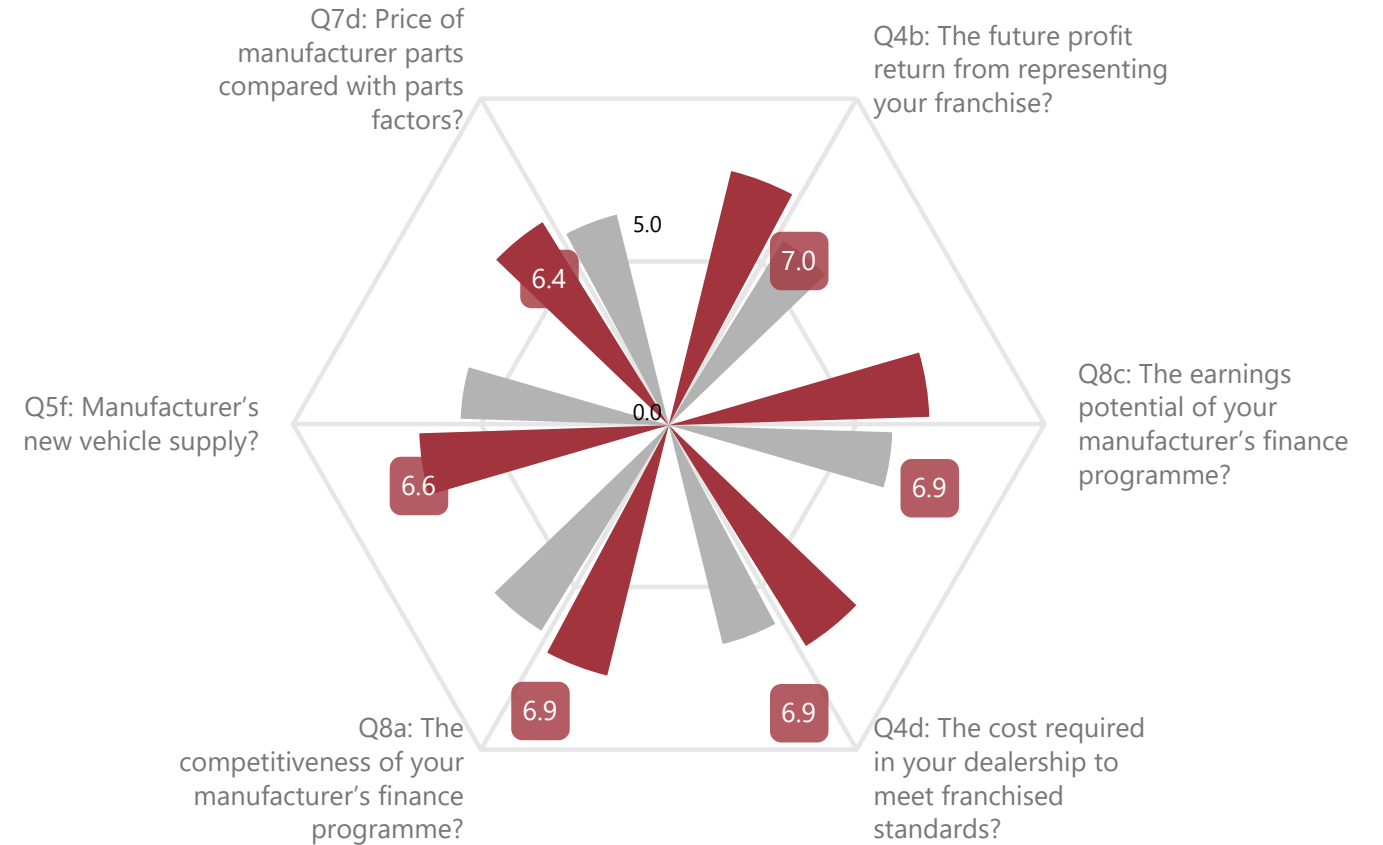
### Top 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



### Bottom 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



Question 4 - Value of the franchise	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	9.0	8.3	-0.7	+2.1
Q4b: The future profit return from representing your franchise?	7.4	7.0	-0.4	+1.2
Q4c: The required level of capital investment?	7.2	7.1	-0.1	+1.1
Q4d: The cost required in your dealership to meet franchised standards?	6.9	6.9	0.0	+0.9
Q4e: The return on capital for your dealership?	7.9	7.6	-0.3	+1.7
Q4f: The quality of guidance provided by your manufacturer to your dealership?	8.1	8.2	+0.1	+2.1
Q4g: The financial support available to your dealership from your manufacturer?	7.8	7.6	-0.2	+2.0

Question 5 - New car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	8.1	7.7	-0.4	+1.6
Q5b: Your new car targeting process?	7.5	7.6	+0.1	+1.6
Q5c: Your total margin on new vehicles?	8.2	7.7	-0.5	+1.6
Q5d: Your current bonus and rebate rates on new car sales?	8.1	7.6	-0.5	+1.6
Q5e: Manufacturer inducement to self register vehicles?	7.8	7.6	-0.2	+1.4
Q5f: Manufacturer's new vehicle supply?	6.8	6.6	-0.2	+1.1
Q5g: The fairness of your manufacturer's new car ordering and stocking policies?	7.5	7.8	+0.3	+1.7
Q5h: The fairness of your manufacturer's demonstrator programme?	8.3	8.1	-0.2	+1.7

Question 6 - Used car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	8.0	7.9	-0.1	+0.8
Q6b: The targets set by your manufacturer for used cars?	8.7	8.4	-0.3	+1.7
Q6c: The cost and quality of your manufacturer's used car warranties?	8.3	8.6	+0.3	+1.9
Q6d: Your total margin on used car sales?	7.9	8.1	+0.2	+1.0
Q6e: Your manufacturer's used car programme?	8.0	8.4	+0.4	+1.6
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	8.1	8.1	0.0	+1.6

Question 7 - Aftersales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	6.7	7.1	+0.4	+0.7
Q7b: Quality of technical support?	8.1	7.8	-0.3	+1.5
Q7c: Availability of parts?	7.6	7.3	-0.3	+1.6
Q7d: Price of manufacturer parts compared with parts factors?	6.1	6.4	+0.3	+0.6
Q7e: Service profitability earnings?	7.7	7.7	0.0	+1.3
Q7f: Manufacturer service plan rates and recovery?	7.0	7.2	+0.2	+0.9
Q7g: The fairness of your manufacturer's warranty policy for you and your cust...	8.1	8.2	+0.1	+1.6
Q7h: Your manufacturer's stocking policy for parts/accessories?	7.5	7.9	+0.4	+1.2

**Question 8 - Finance**

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	6.6	6.9	+0.3	+0.4
Q8b: The reasonableness of the finance targets set by your manufacturer?	7.4	7.5	+0.1	+0.7
Q8c: The earnings potential of your manufacturer's finance programme?	7.0	6.9	-0.1	+1.0
Q8d: The support you receive from your manufacturer's finance house?	7.2	7.1	-0.1	+0.6

**Question 9 - Dealer/Manufacturer relationships**

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	8.5	8.6	+0.1	+2.1
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	8.2	8.2	0.0	+2.1
Q9c: Your manufacturer's dealer council/franchise board?	7.2	7.9	+0.7	+1.3
Q9d: Your manufacturer's response to your communications with them?	8.0	8.1	+0.1	+1.7
Q9e: Your manufacturer dealer standards are fair and reasonable?	8.2	8.1	-0.1	+1.6
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	8.1	7.7	-0.4	+1.5
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	8.0	8.1	+0.1	+1.7
Q9h: The value of manufacturer field staff to your business?	8.1	8.4	+0.3	+2.0
Q9i: The quality of your manufacturer's training?	8.9	8.7	-0.2	+1.8
Q9j: The cost of manufacturer's training?	7.6	7.8	+0.2	+1.5
Q9k: Your manufacturer's apprenticeship programme?	8.9	8.8	-0.1	+1.8
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	7.9	7.9	0.0	+1.9

**Question 10 - Product and marketing**

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q10a: Frequency of introduction of new models?	8.9	8.6	-0.3	+1.9
Q10b: Product value and pricing?	8.0	7.5	-0.5	+1.0
Q10c: Product advertising?	8.2	7.5	-0.7	+1.1

**Question 11 - Electric vehicle/Plug-in vehicles**

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q11a: Battery Electric Vehicle products your manufacturer currently offers?	8.2	7.8	-0.4	+2.0
Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	8.6	8.5	-0.1	+1.8
Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	8.6	8.3	-0.3	+2.0
Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	7.7	7.2	-0.5	+1.9
Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	7.8	7.1	-0.7	+1.9
Q11f: With your manufacturer's support with on-site EV charging infrastructure?		7.5	-	+2.6

**Question 12 & 13 - Overall Rating**

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	8.6	8.7	+0.1	+2.4
Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	8.7	8.7	0.0	+2.3

## Overall Manufacturer Rating

Q12: How would you rate your manufacturer overall on a scale of 1 to 10?

Winter 2022

2.7

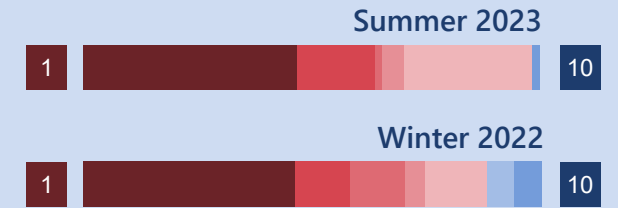
Summer 2023

2.6

Ranking vs. Winter 22  
28 vs. 32

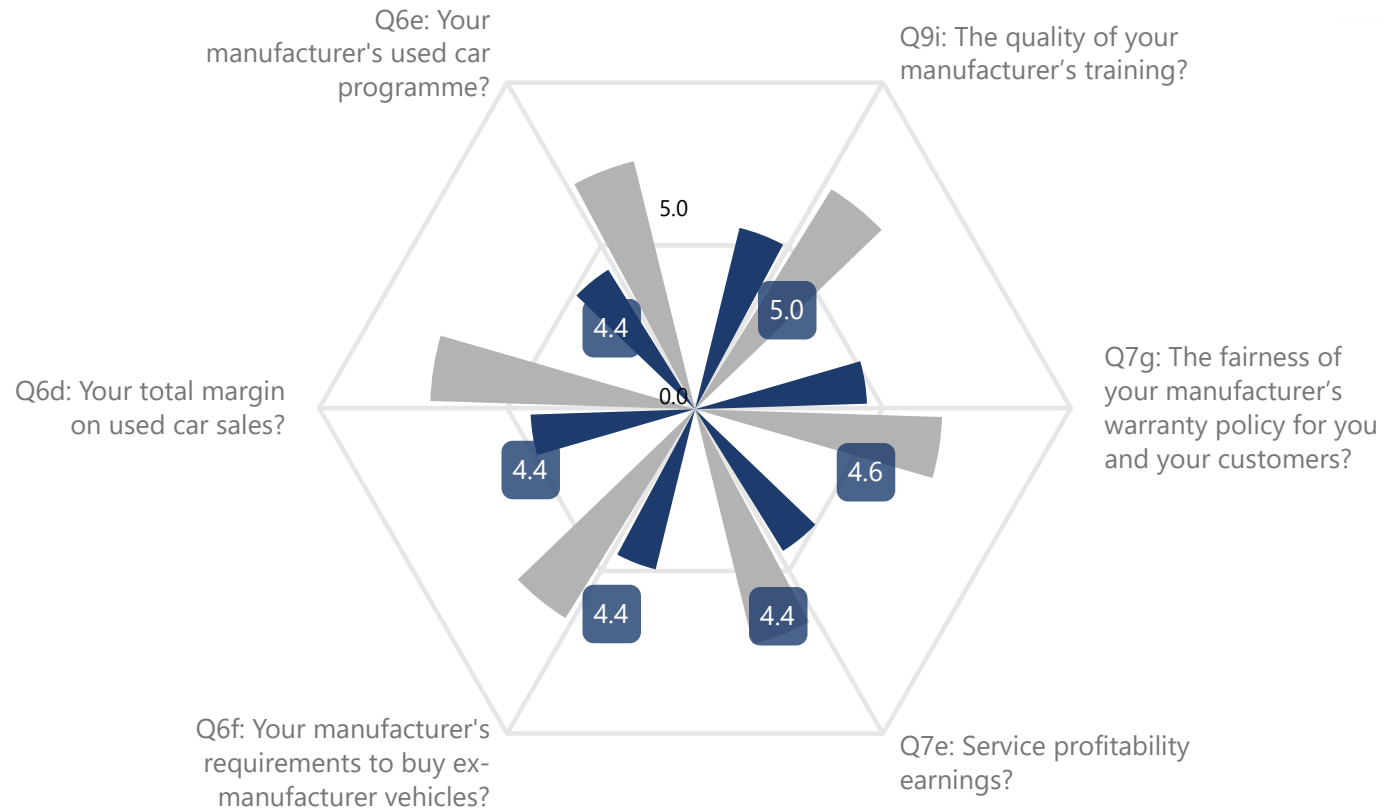
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Score Change  
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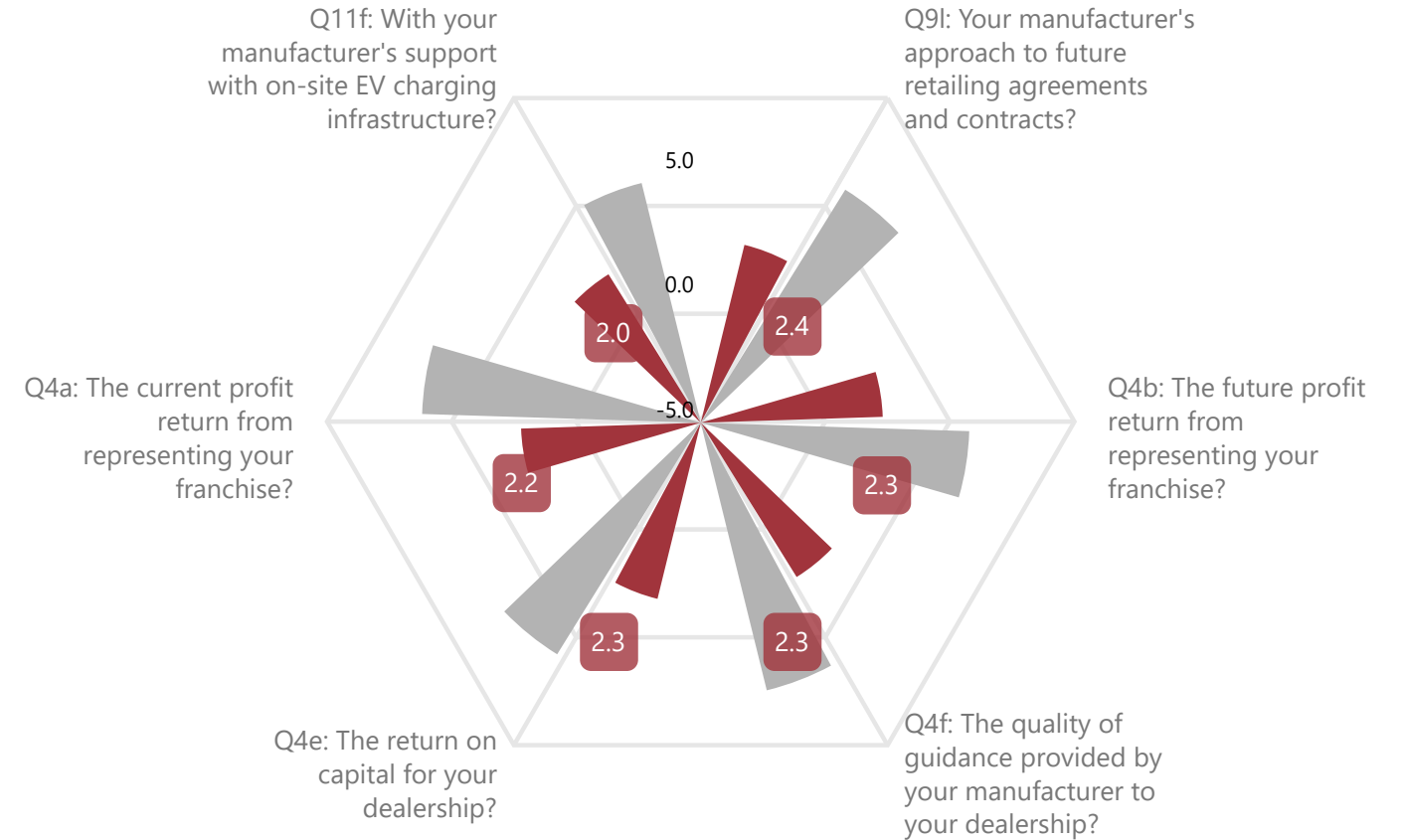
### Top 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



### Bottom 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



Question 4 - Value of the franchise	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	2.7	2.2	-0.5	-4.0
Q4b: The future profit return from representing your franchise?	2.7	2.3	-0.4	-3.5
Q4c: The required level of capital investment?	3.7	2.9	-0.8	-3.2
Q4d: The cost required in your dealership to meet franchised standards?	3.4	2.8	-0.6	-3.2
Q4e: The return on capital for your dealership?	2.7	2.3	-0.4	-3.7
Q4f: The quality of guidance provided by your manufacturer to your dealership?	2.7	2.3	-0.4	-3.8
Q4g: The financial support available to your dealership from your manufacturer?	2.6	2.5	-0.1	-3.1

Question 5 - New car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	3.3	2.9	-0.4	-3.3
Q5b: Your new car targeting process?	3.5	2.9	-0.6	-3.2
Q5c: Your total margin on new vehicles?	3.2	2.5	-0.7	-3.6
Q5d: Your current bonus and rebate rates on new car sales?	3.2	2.5	-0.7	-3.5
Q5e: Manufacturer inducement to self register vehicles?	3.2	3.1	-0.1	-3.1
Q5f: Manufacturer's new vehicle supply?	2.5	3.2	+0.7	-2.3
Q5g: The fairness of your manufacturer's new car ordering and stocking policies?	2.2	3.0	+0.8	-3.1
Q5h: The fairness of your manufacturer's demonstrator programme?	3.4	2.9	-0.5	-3.5

Question 6 - Used car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	5.0	4.2	-0.8	-2.9
Q6b: The targets set by your manufacturer for used cars?	5.3	3.9	-1.4	-2.8
Q6c: The cost and quality of your manufacturer's used car warranties?	4.9	4.0	-0.9	-2.7
Q6d: Your total margin on used car sales?	5.5	4.4	-1.1	-2.7
Q6e: Your manufacturer's used car programme?	5.4	4.4	-1.0	-2.4
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	5.7	4.4	-1.3	-2.2

Question 7 - Aftersales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	4.9	4.3	-0.6	-2.1
Q7b: Quality of technical support?	4.2	4.1	-0.1	-2.1
Q7c: Availability of parts?	2.6	3.3	+0.7	-2.4
Q7d: Price of manufacturer parts compared with parts factors?	3.6	3.8	+0.2	-1.9
Q7e: Service profitability earnings?	4.6	4.4	-0.2	-2.0
Q7f: Manufacturer service plan rates and recovery?	4.3	3.5	-0.8	-2.8
Q7g: The fairness of your manufacturer's warranty policy for you and your cust...	5.0	4.6	-0.4	-2.0
Q7h: Your manufacturer's stocking policy for parts/accessories?	4.5	3.9	-0.6	-2.8



### Question 8 - Finance

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	3.4	3.3	-0.1	-3.2
Q8b: The reasonableness of the finance targets set by your manufacturer?	4.2	3.4	-0.8	-3.4
Q8c: The earnings potential of your manufacturer's finance programme?	3.6	2.8	-0.8	-3.1
Q8d: The support you receive from your manufacturer's finance house?	4.0	3.0	-1.0	-3.5

### Question 9 - Dealer/Manufacturer relationships

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	3.0	2.5	-0.5	-4.1
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	2.4	2.4	0.0	-3.7
Q9c: Your manufacturer's dealer council/franchise board?	4.1	3.8	-0.3	-2.9
Q9d: Your manufacturer's response to your communications with them?	2.4	2.4	0.0	-3.9
Q9e: Your manufacturer dealer standards are fair and reasonable?	3.4	3.0	-0.4	-3.5
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	2.3	2.8	+0.5	-3.4
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	3.1	2.7	-0.4	-3.6
Q9h: The value of manufacturer field staff to your business?	3.0	2.5	-0.5	-3.8
Q9i: The quality of your manufacturer's training?	4.4	5.0	+0.6	-1.9
Q9j: The cost of manufacturer's training?	3.5	3.4	-0.1	-2.9
Q9k: Your manufacturer's apprenticeship programme?	4.3	3.8	-0.5	-3.2
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	2.5	2.4	-0.1	-3.7

### Question 10 - Product and marketing

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q10a: Frequency of introduction of new models?	3.7	3.3	-0.4	-3.4
Q10b: Product value and pricing?	3.4	3.6	+0.2	-2.9
Q10c: Product advertising?	3.5	2.7	-0.8	-3.7

### Question 11 - Electric vehicle/Plug-in vehicles

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q11a: Battery Electric Vehicle products your manufacturer currently offers?	3.3	2.7	-0.6	-3.2
Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	3.9	3.4	-0.5	-3.2
Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	4.1	3.1	-1.0	-3.3
Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	3.4	2.8	-0.6	-2.5
Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	2.9	2.5	-0.4	-2.7
Q11f: With your manufacturer's support with on-site EV charging infrastructure?		2.0	-	-2.9

### Question 12 & 13 - Overall Rating

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	2.7	2.6	-0.1	-3.8
Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	2.5	2.5	0.0	-3.9

## Overall Manufacturer Rating

Q12: How would you rate your manufacturer overall on a scale of 1 to 10?

Winter 2022

5.5

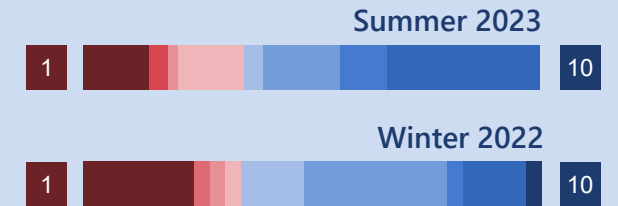
Summer 2023

6.3

Ranking vs. Winter 22  
**16 vs. 20**

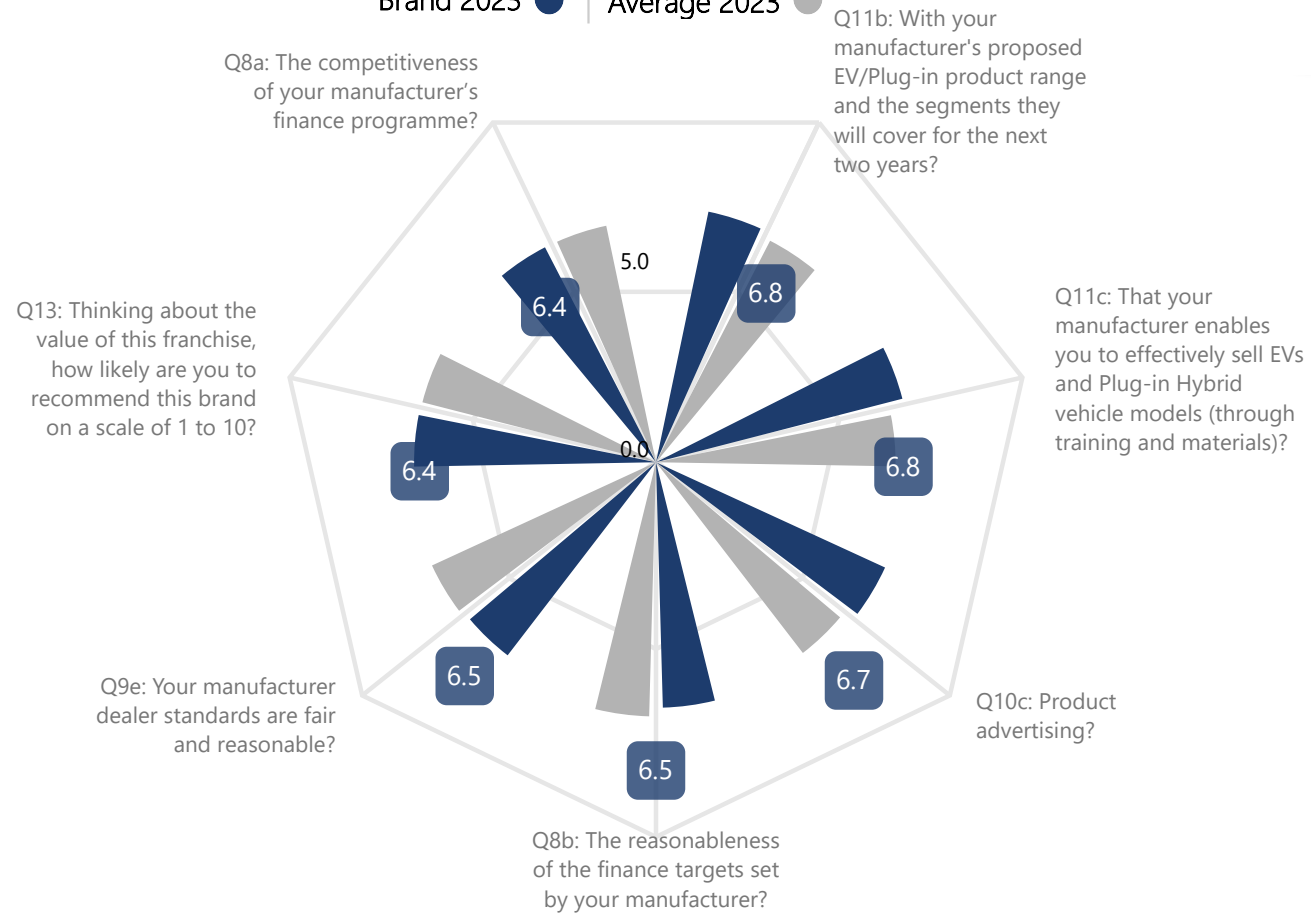
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Score Change  
**+0.8 pts**



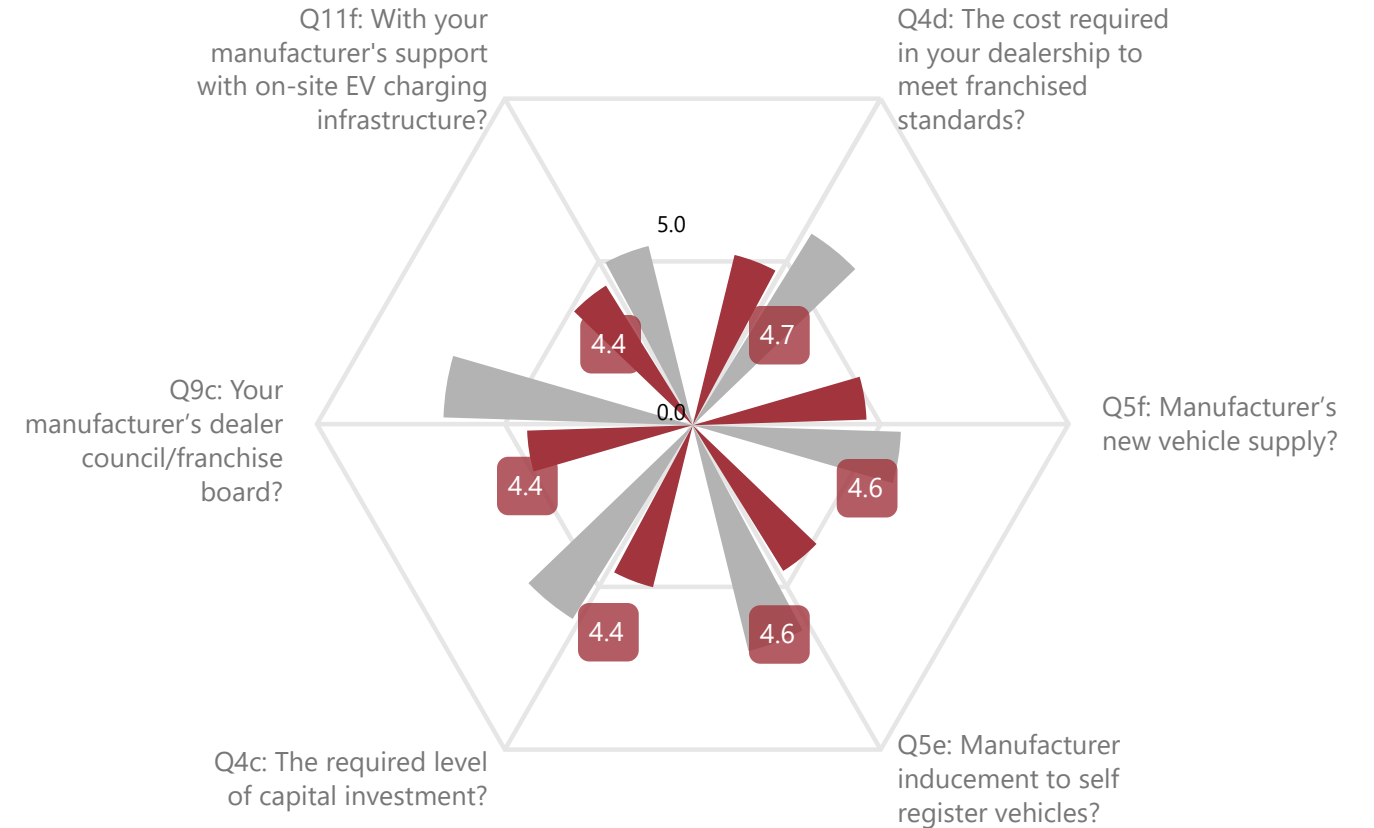
### Top 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



### Bottom 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



Question 4 - Value of the franchise	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	5.5	5.0	-0.5	-1.1
Q4b: The future profit return from representing your franchise?	6.0	6.1	+0.1	+0.3
Q4c: The required level of capital investment?	5.0	4.4	-0.6	-1.6
Q4d: The cost required in your dealership to meet franchised standards?	5.0	4.7	-0.3	-1.3
Q4e: The return on capital for your dealership?	4.7	4.9	+0.2	-1.0
Q4f: The quality of guidance provided by your manufacturer to your dealership?	5.2	6.0	+0.8	-0.1
Q4g: The financial support available to your dealership from your manufacturer?	4.7	5.3	+0.6	-0.3

Question 5 - New car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	5.8	5.8	0.0	-0.4
Q5b: Your new car targeting process?	5.8	5.9	+0.1	-0.1
Q5c: Your total margin on new vehicles?	4.6	5.2	+0.6	-0.8
Q5d: Your current bonus and rebate rates on new car sales?	4.9	5.0	+0.1	-1.0
Q5e: Manufacturer inducement to self register vehicles?	5.4	4.6	-0.8	-1.6
Q5f: Manufacturer's new vehicle supply?	4.3	4.6	+0.3	-0.9
Q5g: The fairness of your manufacturer's new car ordering and stocking policies?	5.3	5.9	+0.6	-0.1
Q5h: The fairness of your manufacturer's demonstrator programme?	5.8	6.1	+0.3	-0.3

Question 6 - Used car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	5.8	5.8	0.0	-1.3
Q6b: The targets set by your manufacturer for used cars?	6.7	5.7	-1.0	-1.1
Q6c: The cost and quality of your manufacturer's used car warranties?	6.7	5.5	-1.2	-1.1
Q6d: Your total margin on used car sales?	5.8	5.9	+0.1	-1.2
Q6e: Your manufacturer's used car programme?	5.2	5.4	+0.2	-1.4
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	5.6	5.1	-0.5	-1.4

Question 7 - Aftersales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	4.8	5.7	+0.9	-0.8
Q7b: Quality of technical support?	5.0	5.0	0.0	-1.3
Q7c: Availability of parts?	4.4	5.3	+0.9	-0.5
Q7d: Price of manufacturer parts compared with parts factors?	5.0	5.8	+0.8	-0.0
Q7e: Service profitability earnings?	5.4	5.3	-0.1	-1.1
Q7f: Manufacturer service plan rates and recovery?	5.1	5.5	+0.4	-0.8
Q7g: The fairness of your manufacturer's warranty policy for you and your cust...	5.4	5.6	+0.2	-0.9
Q7h: Your manufacturer's stocking policy for parts/accessories?	5.4	6.3	+0.9	-0.3

### Question 8 - Finance

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	5.9	6.4	+0.5	+0.0
Q8b: The reasonableness of the finance targets set by your manufacturer?	6.4	6.5	+0.1	-0.2
Q8c: The earnings potential of your manufacturer's finance programme?	5.3	5.4	+0.1	-0.6
Q8d: The support you receive from your manufacturer's finance house?	5.8	5.5	-0.3	-1.0

### Question 9 - Dealer/Manufacturer relationships

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	5.2	6.4	+1.2	-0.1
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	4.9	6.2	+1.3	+0.0
Q9c: Your manufacturer's dealer council/franchise board?	5.0	4.4	-0.6	-2.2
Q9d: Your manufacturer's response to your communications with them?	5.6	5.8	+0.2	-0.5
Q9e: Your manufacturer dealer standards are fair and reasonable?	5.5	6.5	+1.0	-0.1
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	4.9	5.9	+1.0	-0.3
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	5.2	6.4	+1.2	+0.1
Q9h: The value of manufacturer field staff to your business?	5.5	5.6	+0.1	-0.7
Q9i: The quality of your manufacturer's training?	6.0	5.9	-0.1	-1.0
Q9j: The cost of manufacturer's training?	5.1	5.8	+0.7	-0.5
Q9k: Your manufacturer's apprenticeship programme?	6.0	5.9	-0.1	-1.1
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	5.0	5.5	+0.5	-0.5

### Question 10 - Product and marketing

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q10a: Frequency of introduction of new models?	6.4	6.4	0.0	-0.3
Q10b: Product value and pricing?	6.0	6.3	+0.3	-0.3
Q10c: Product advertising?	6.3	6.7	+0.4	+0.3

### Question 11 - Electric vehicle/Plug-in vehicles

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q11a: Battery Electric Vehicle products your manufacturer currently offers?	5.9	6.1	+0.2	+0.2
Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	7.0	6.8	-0.2	+0.2
Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	6.1	6.8	+0.7	+0.4
Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	5.1	5.4	+0.3	+0.0
Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	5.3	4.9	-0.4	-0.3
Q11f: With your manufacturer's support with on-site EV charging infrastructure?		4.4	-	-0.5

### Question 12 & 13 - Overall Rating

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	5.5	6.3	+0.8	-0.0
Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	5.3	6.4	+1.1	+0.0

## Overall Manufacturer Rating

Q12: How would you rate your manufacturer overall on a scale of 1 to 10?

Winter 2022

7.1

Summer 2023

7.6

Ranking vs. Winter 22  
9 vs. 13

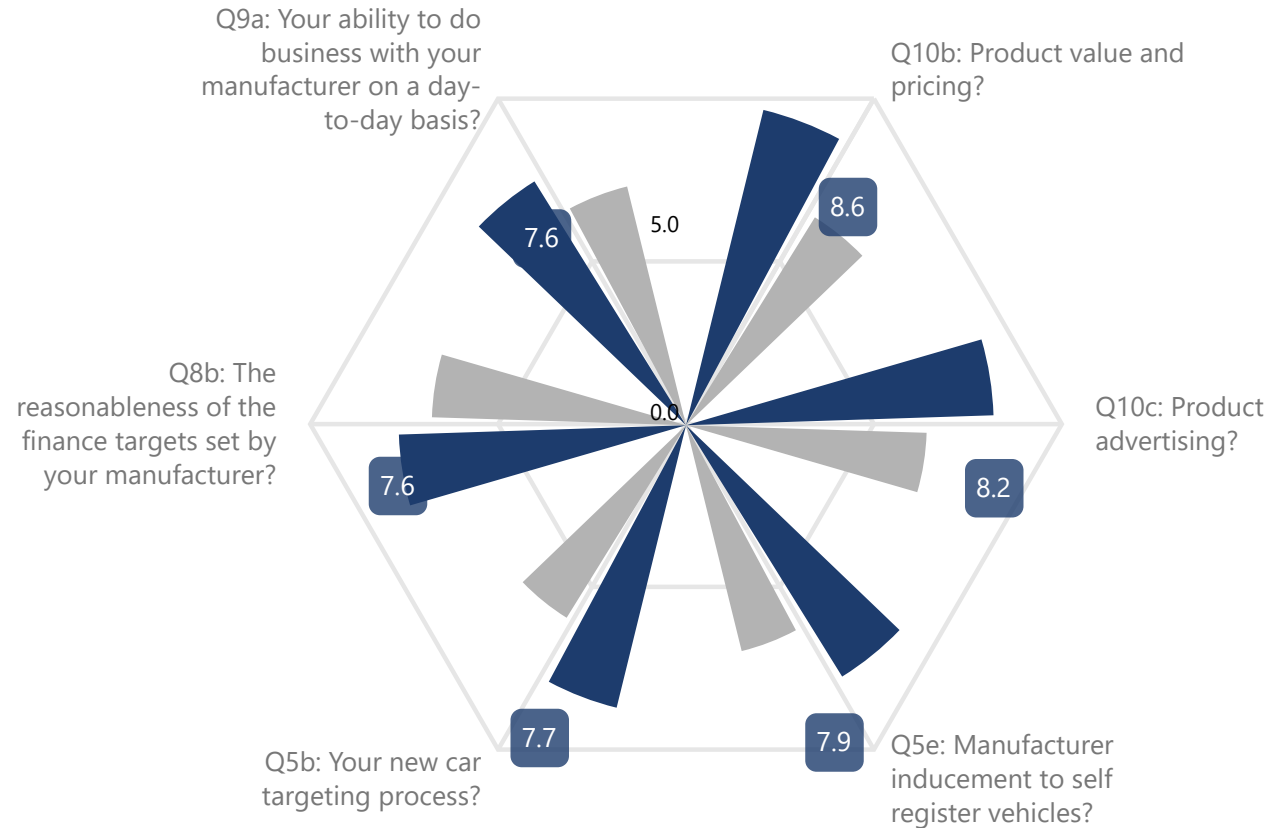
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**+7.0%**

Score Change  
**+0.5 pts**



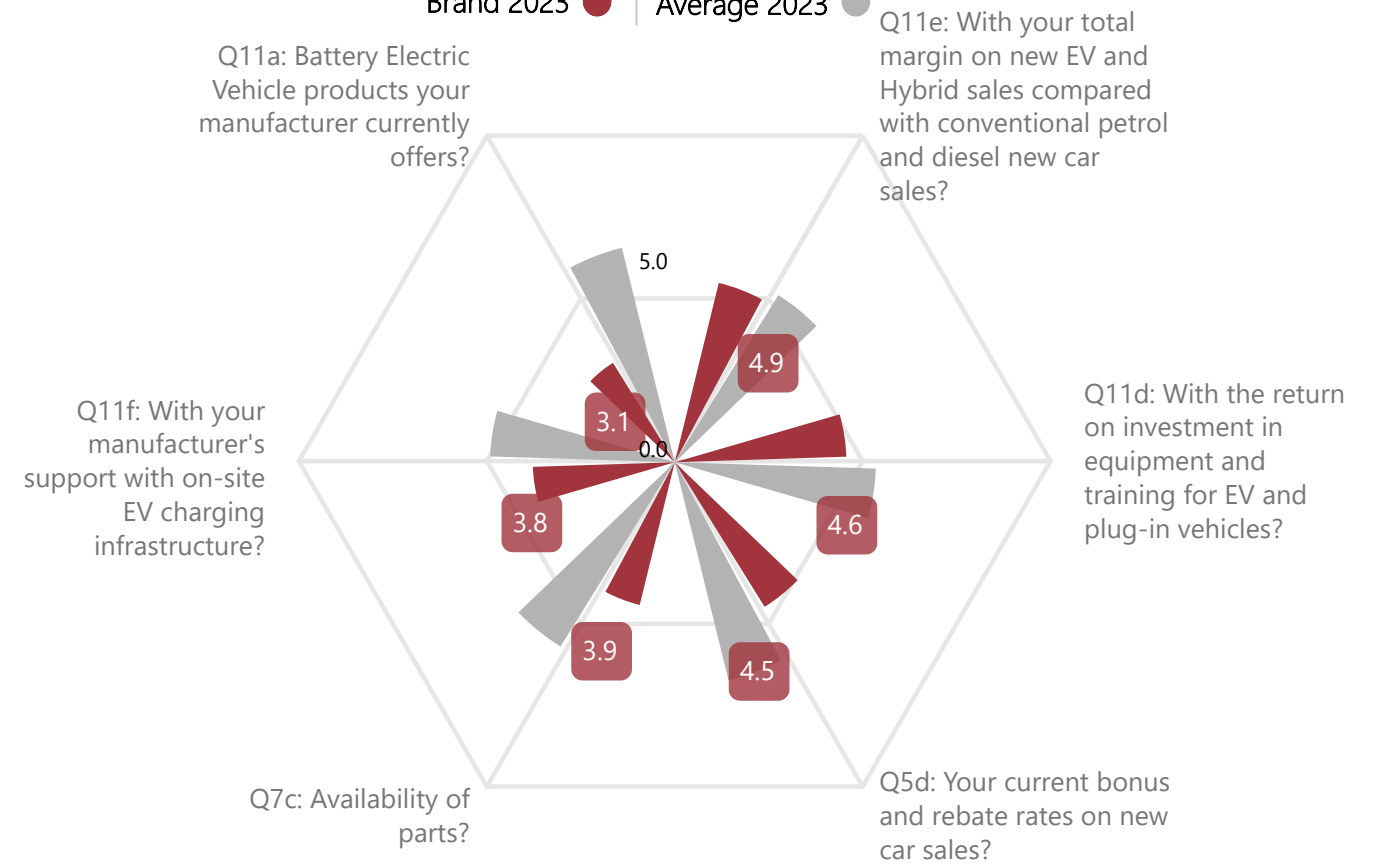
### Top 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



### Bottom 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



Question 4 - Value of the franchise	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	6.5	6.9	+0.4	+0.7
Q4b: The future profit return from representing your franchise?	6.7	7.2	+0.5	+1.4
Q4c: The required level of capital investment?	6.5	7.0	+0.5	+0.9
Q4d: The cost required in your dealership to meet franchised standards?	7.1	6.7	-0.4	+0.7
Q4e: The return on capital for your dealership?	6.8	7.2	+0.4	+1.2
Q4f: The quality of guidance provided by your manufacturer to your dealership?	6.8	7.3	+0.5	+1.2
Q4g: The financial support available to your dealership from your manufacturer?	5.5	5.6	+0.1	+0.1

Question 5 - New car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	7.1	7.6	+0.5	+1.4
Q5b: Your new car targeting process?	7.0	7.7	+0.7	+1.7
Q5c: Your total margin on new vehicles?	4.8	5.7	+0.9	-0.3
Q5d: Your current bonus and rebate rates on new car sales?	3.9	4.5	+0.6	-1.4
Q5e: Manufacturer inducement to self register vehicles?	6.4	7.9	+1.5	+1.7
Q5f: Manufacturer's new vehicle supply?	4.8	6.3	+1.5	+0.8
Q5g: The fairness of your manufacturer's new car ordering and stocking policies?	6.8	7.2	+0.4	+1.1
Q5h: The fairness of your manufacturer's demonstrator programme?	6.7	7.1	+0.4	+0.7

Question 6 - Used car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	5.8	7.2	+1.4	+0.1
Q6b: The targets set by your manufacturer for used cars?	5.3	6.9	+1.6	+0.2
Q6c: The cost and quality of your manufacturer's used car warranties?	5.2	6.9	+1.7	+0.2
Q6d: Your total margin on used car sales?	7.1	7.2	+0.1	+0.2
Q6e: Your manufacturer's used car programme?	4.1	6.9	+2.8	+0.1
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	3.1	7.5	+4.4	+0.9

Question 7 - Aftersales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	5.4	6.7	+1.3	+0.2
Q7b: Quality of technical support?	6.0	6.4	+0.4	+0.2
Q7c: Availability of parts?	4.2	3.9	-0.3	-1.9
Q7d: Price of manufacturer parts compared with parts factors?	4.7	5.9	+1.2	+0.1
Q7e: Service profitability earnings?	5.9	5.6	-0.3	-0.8
Q7f: Manufacturer service plan rates and recovery?	5.4	6.6	+1.2	+0.2
Q7g: The fairness of your manufacturer's warranty policy for you and your cust...	6.8	6.4	-0.4	-0.2
Q7h: Your manufacturer's stocking policy for parts/accessories?	6.2	6.1	-0.1	-0.5

Question 8 - Finance	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	7.0	7.1	+0.1	+0.7
Q8b: The reasonableness of the finance targets set by your manufacturer?	7.0	7.6	+0.6	+0.9
Q8c: The earnings potential of your manufacturer's finance programme?	5.8	6.1	+0.3	+0.2
Q8d: The support you receive from your manufacturer's finance house?	6.2	6.5	+0.3	-0.0

Question 9 - Dealer/Manufacturer relationships	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	7.4	7.6	+0.2	+1.1
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	6.1	6.6	+0.5	+0.4
Q9c: Your manufacturer's dealer council/franchise board?	6.2	6.8	+0.6	+0.2
Q9d: Your manufacturer's response to your communications with them?	6.2	7.0	+0.8	+0.7
Q9e: Your manufacturer dealer standards are fair and reasonable?	6.7	7.2	+0.5	+0.6
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	5.4	6.3	+0.9	+0.1
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	6.1	6.8	+0.7	+0.4
Q9h: The value of manufacturer field staff to your business?	6.3	6.3	0.0	-0.0
Q9i: The quality of your manufacturer's training?	6.3	7.5	+1.2	+0.6
Q9j: The cost of manufacturer's training?	5.1	6.3	+1.2	-0.0
Q9k: Your manufacturer's apprenticeship programme?	6.4	5.9	-0.5	-1.1
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	6.5	6.9	+0.4	+0.9

Question 10 - Product and marketing	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q10a: Frequency of introduction of new models?	6.1	7.2	+1.1	+0.6
Q10b: Product value and pricing?	8.3	8.6	+0.3	+2.1
Q10c: Product advertising?	8.1	8.2	+0.1	+1.8

Question 11 - Electric vehicle/Plug-in vehicles	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q11a: Battery Electric Vehicle products your manufacturer currently offers?	1.7	3.1	+1.4	-2.8
Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	4.1	6.5	+2.4	-0.2
Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	6.2	4.9	-1.3	-1.4
Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	5.7	4.6	-1.1	-0.8
Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	3.9	4.9	+1.0	-0.3
Q11f: With your manufacturer's support with on-site EV charging infrastructure?		3.8	-	-1.1

Question 12 & 13 - Overall Rating	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	7.1	7.6	+0.5	+1.3
Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	7.4	7.6	+0.2	+1.2

**Overall Manufacturer Rating**

Q12: How would you rate your manufacturer overall on a scale of 1 to 10?

Winter 2022

4.0

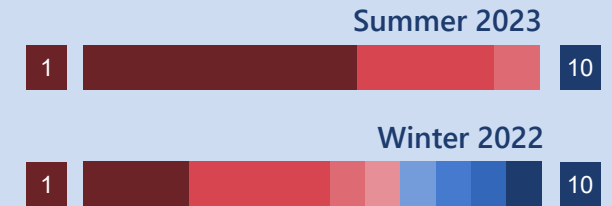
Summer 2023

1.5

Ranking vs. Winter 22  
32 vs. 26

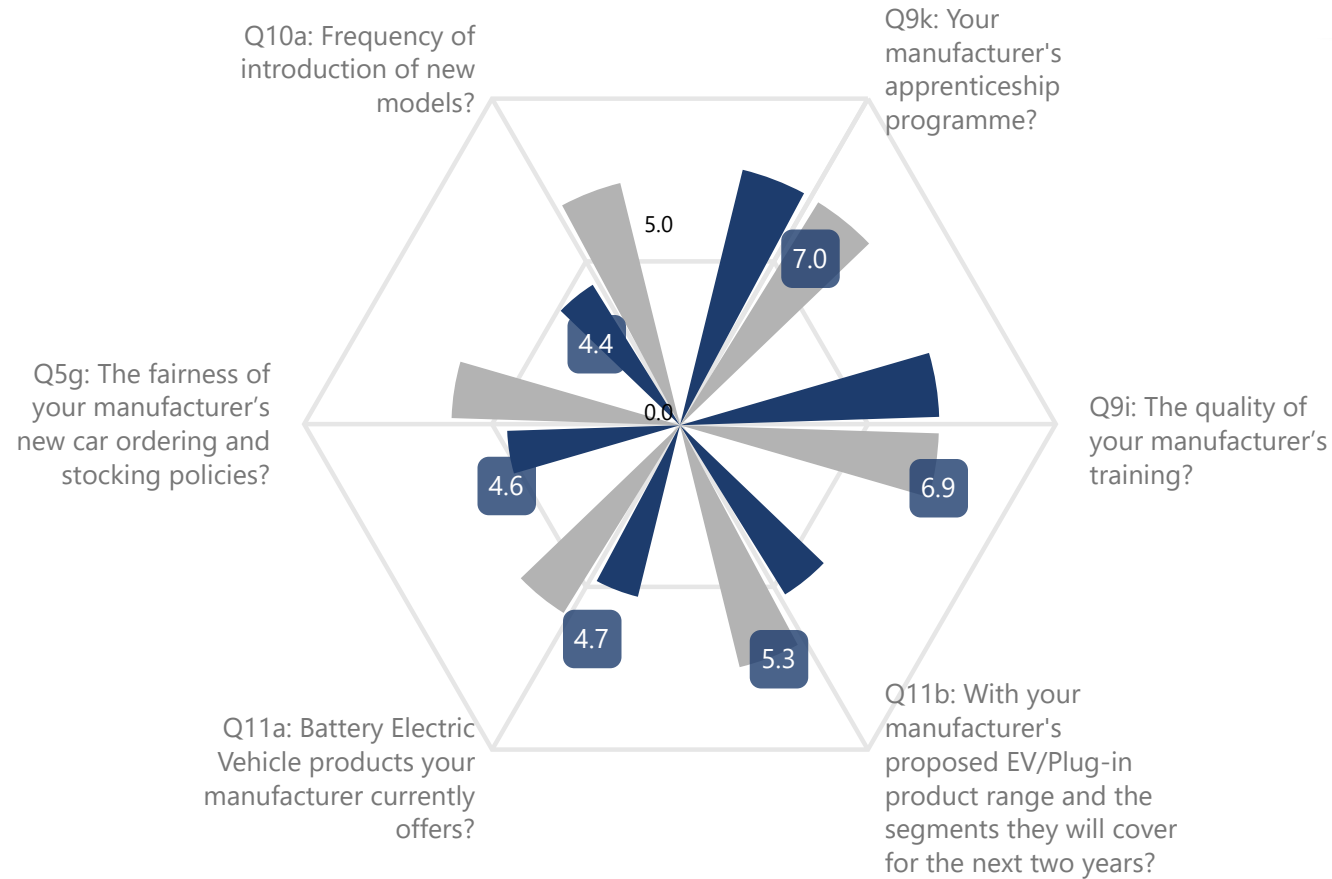
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Score Change  
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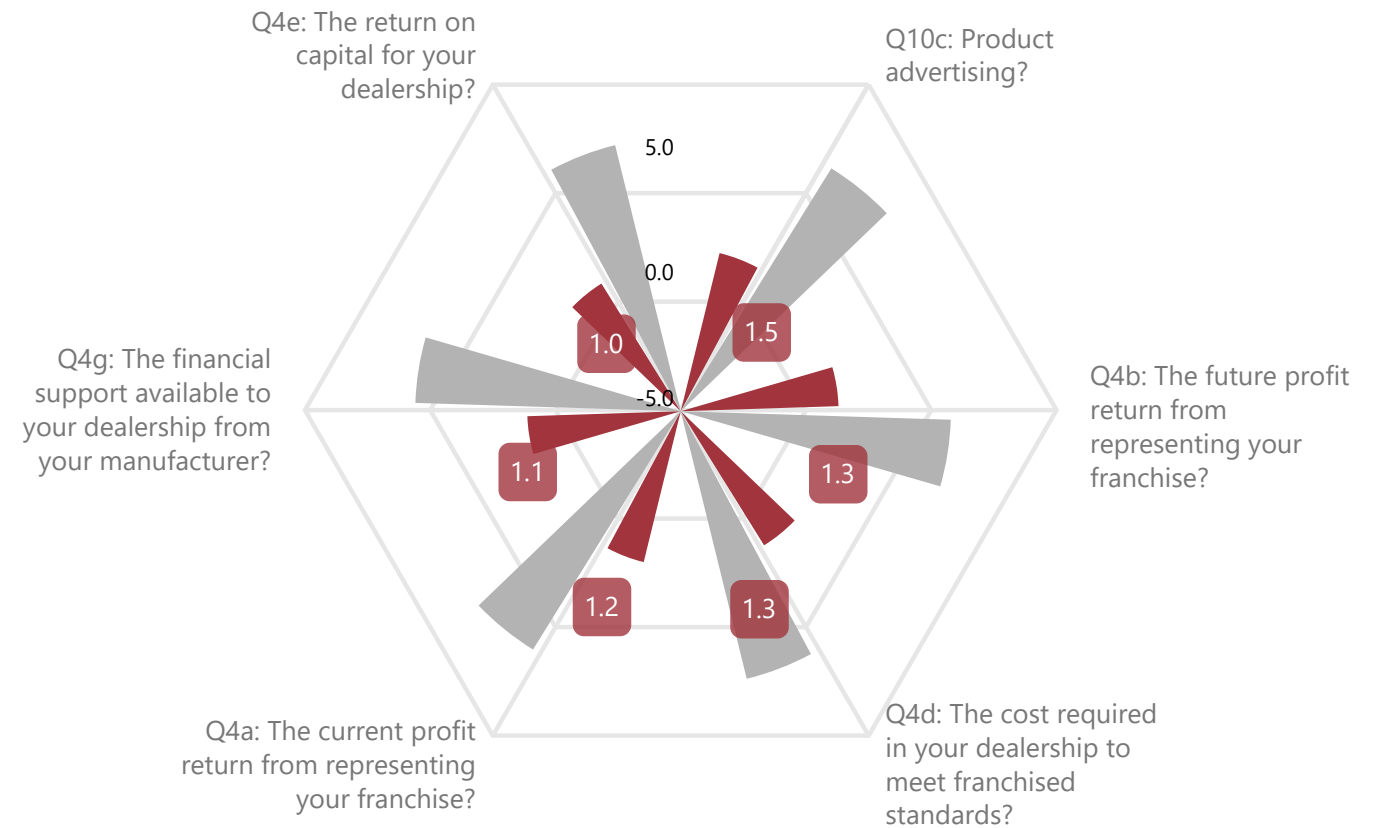
**Top 6 Questions vs Average**

Brand 2023 ● | Average 2023 ●



**Bottom 6 Questions vs Average**

Brand 2023 ● | Average 2023 ●





Question 4 - Value of the franchise	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	3.7	1.2	-2.5	-5.0
Q4b: The future profit return from representing your franchise?	4.2	1.3	-2.9	-4.5
Q4c: The required level of capital investment?	3.6	2.2	-1.4	-3.9
Q4d: The cost required in your dealership to meet franchised standards?	3.6	1.3	-2.3	-4.7
Q4e: The return on capital for your dealership?	3.3	1.0	-2.3	-4.9
Q4f: The quality of guidance provided by your manufacturer to your dealership?	4.3	1.8	-2.5	-4.3
Q4g: The financial support available to your dealership from your manufacturer?	4.5	1.1	-3.4	-4.5

Question 5 - New car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	3.9	1.9	-2.0	-4.3
Q5b: Your new car targeting process?	3.5	1.7	-1.8	-4.3
Q5c: Your total margin on new vehicles?	6.0	3.2	-2.8	-2.9
Q5d: Your current bonus and rebate rates on new car sales?	5.3	2.1	-3.2	-3.9
Q5e: Manufacturer inducement to self register vehicles?	4.9	3.0	-1.9	-3.2
Q5f: Manufacturer's new vehicle supply?	4.6	3.0	-1.6	-2.5
Q5g: The fairness of your manufacturer's new car ordering and stocking policies?	6.4	4.6	-1.8	-1.5
Q5h: The fairness of your manufacturer's demonstrator programme?	5.6	2.8	-2.8	-3.6

Question 6 - Used car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	7.8	3.7	-4.1	-3.4
Q6b: The targets set by your manufacturer for used cars?	7.3	2.0	-5.3	-4.7
Q6c: The cost and quality of your manufacturer's used car warranties?	7.7	3.0	-4.7	-3.7
Q6d: Your total margin on used car sales?	7.3	3.9	-3.4	-3.1
Q6e: Your manufacturer's used car programme?	7.8	3.7	-4.1	-3.1
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	6.9	2.9	-4.0	-3.7

Question 7 - Aftersales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	6.4	4.0	-2.4	-2.5
Q7b: Quality of technical support?	6.1	3.5	-2.6	-2.8
Q7c: Availability of parts?	4.0	2.5	-1.5	-3.3
Q7d: Price of manufacturer parts compared with parts factors?	5.5	3.3	-2.2	-2.5
Q7e: Service profitability earnings?	6.0	2.8	-3.2	-3.6
Q7f: Manufacturer service plan rates and recovery?	5.5	3.3	-2.2	-3.1
Q7g: The fairness of your manufacturer's warranty policy for you and your cust...	7.1	3.3	-3.8	-3.3
Q7h: Your manufacturer's stocking policy for parts/accessories?	6.4	3.4	-3.0	-3.2

**Question 8 - Finance**

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	5.2	3.9	-1.3	-2.5
Q8b: The reasonableness of the finance targets set by your manufacturer?	6.1	1.9	-4.2	-4.9
Q8c: The earnings potential of your manufacturer's finance programme?	4.8	2.1	-2.7	-3.9
Q8d: The support you receive from your manufacturer's finance house?	5.4	2.1	-3.3	-4.4

**Question 9 - Dealer/Manufacturer relationships**

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	5.6	2.6	-3.0	-3.9
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	5.4	2.0	-3.4	-4.1
Q9c: Your manufacturer's dealer council/franchise board?	5.5	4.0	-1.5	-2.6
Q9d: Your manufacturer's response to your communications with them?	4.7	1.6	-3.1	-4.8
Q9e: Your manufacturer dealer standards are fair and reasonable?	6.2	2.0	-4.2	-4.6
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	4.5	2.4	-2.1	-3.8
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	6.0	2.0	-4.0	-4.3
Q9h: The value of manufacturer field staff to your business?	4.6	2.8	-1.8	-3.5
Q9i: The quality of your manufacturer's training?	6.5	6.9	+0.4	+0.0
Q9j: The cost of manufacturer's training?	5.1	1.6	-3.5	-4.7
Q9k: Your manufacturer's apprenticeship programme?	5.8	7.0	+1.2	+0.0
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	4.3	1.9	-2.4	-4.1

**Question 10 - Product and marketing**

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q10a: Frequency of introduction of new models?	4.9	4.4	-0.5	-2.2
Q10b: Product value and pricing?	4.1	2.8	-1.3	-3.7
Q10c: Product advertising?	2.8	1.5	-1.3	-4.9

**Question 11 - Electric vehicle/Plug-in vehicles**

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q11a: Battery Electric Vehicle products your manufacturer currently offers?	4.8	4.7	-0.1	-1.2
Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	5.5	5.3	-0.2	-1.3
Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	7.0	3.8	-3.2	-2.6
Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	5.3	1.8	-3.5	-3.6
Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	4.7	2.3	-2.4	-2.9
Q11f: With your manufacturer's support with on-site EV charging infrastructure?		2.1	-	-2.8

**Question 12 & 13 - Overall Rating**

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	4.0	1.5	-2.5	-4.8
Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	2.9	1.5	-1.4	-4.9

## Overall Manufacturer Rating

Q12: How would you rate your manufacturer overall on a scale of 1 to 10?

Winter 2022

3.9

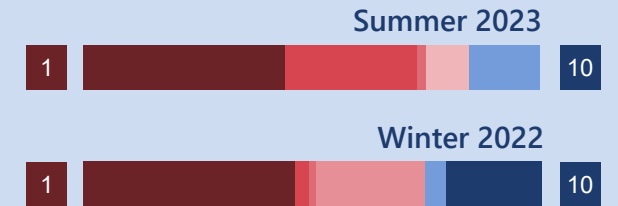
Summer 2023

2.6

Ranking vs. Winter 22  
**27 vs. 28**

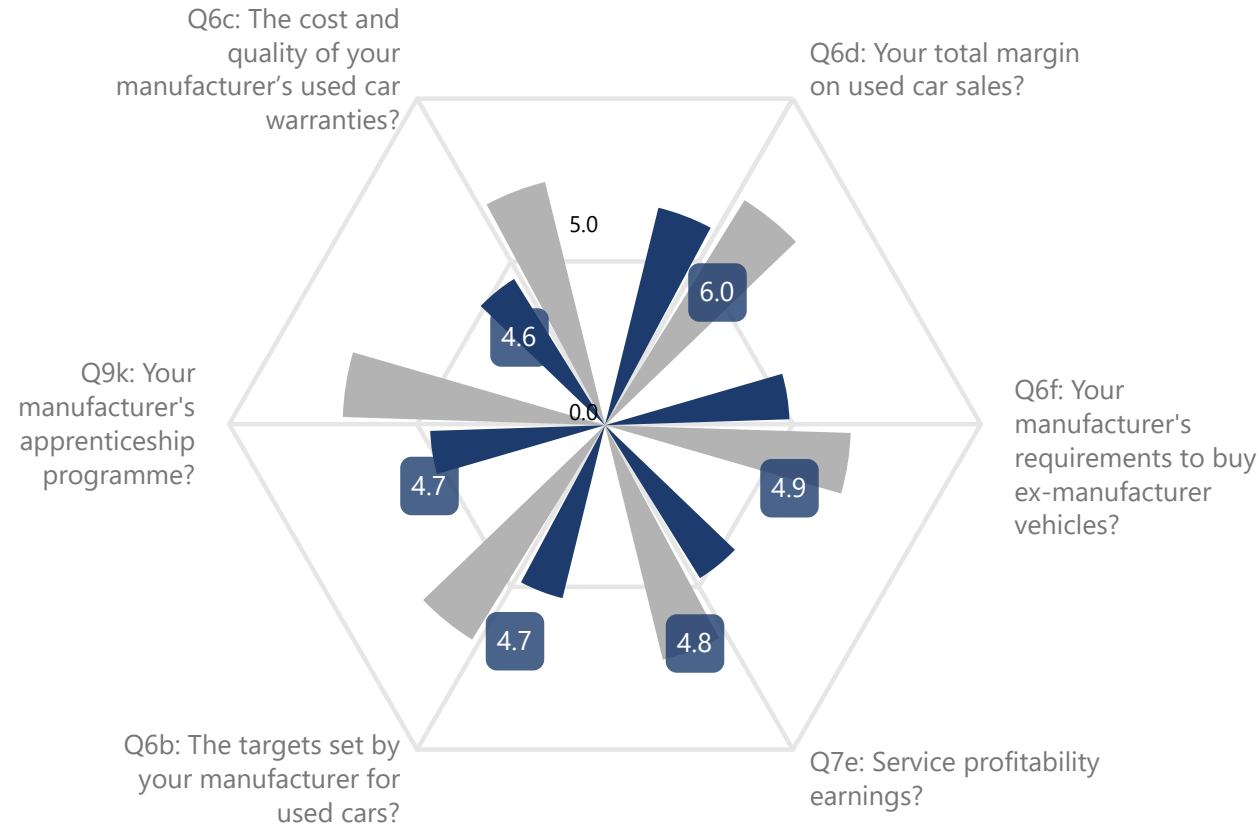
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Score Change  
**-1.3 pts**



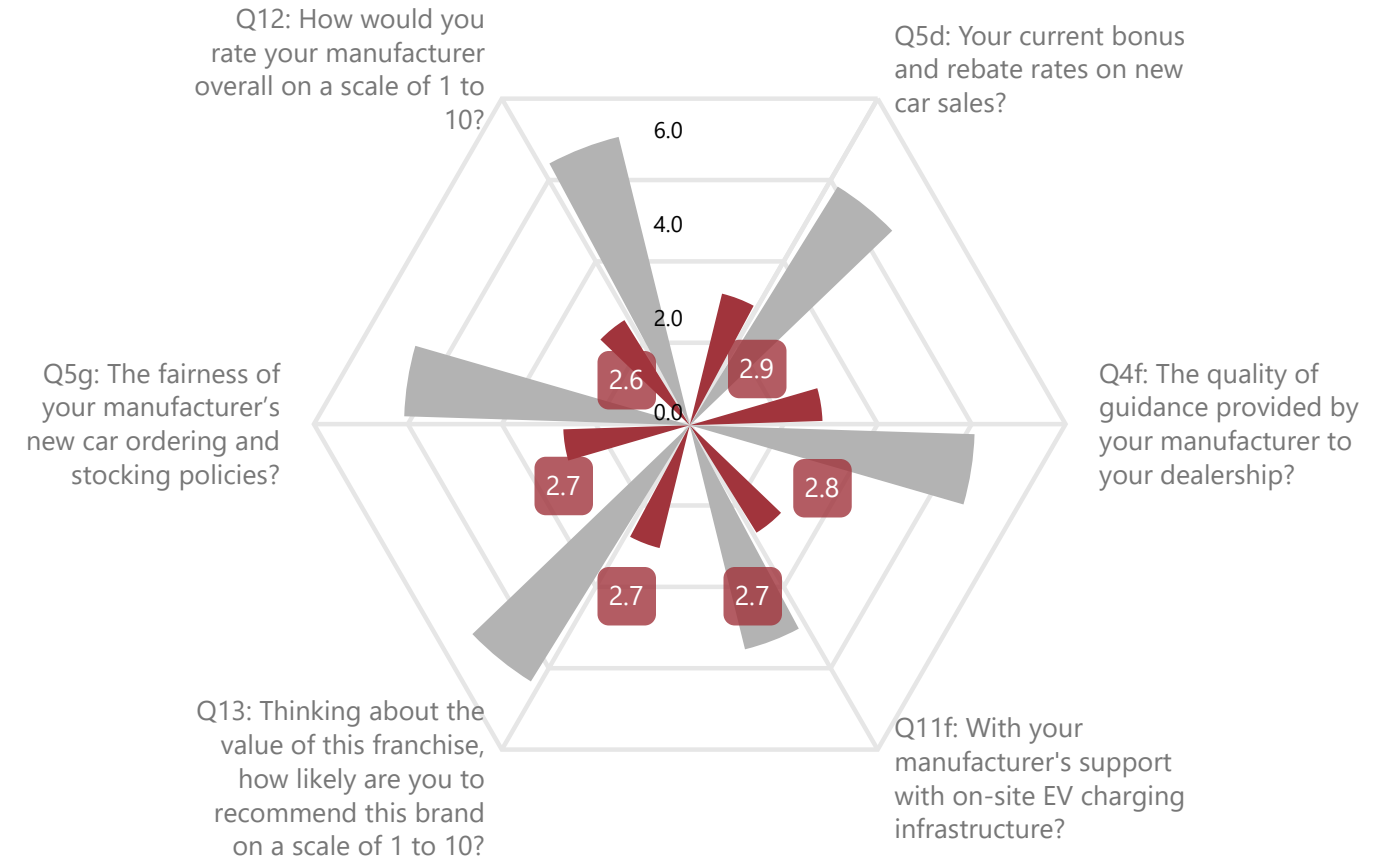
## Top 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



## Bottom 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



Question 4 - Value of the franchise	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	4.6	2.9	-1.7	-3.3
Q4b: The future profit return from representing your franchise?	4.4	3.5	-0.9	-2.3
Q4c: The required level of capital investment?	5.3	3.3	-2.0	-2.7
Q4d: The cost required in your dealership to meet franchised standards?	5.1	3.6	-1.5	-2.4
Q4e: The return on capital for your dealership?	4.7	3.0	-1.7	-2.9
Q4f: The quality of guidance provided by your manufacturer to your dealership?	4.2	2.8	-1.4	-3.2
Q4g: The financial support available to your dealership from your manufacturer?	3.3	3.0	-0.3	-2.6

Question 5 - New car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	4.1	3.2	-0.9	-3.0
Q5b: Your new car targeting process?	3.9	3.1	-0.8	-3.0
Q5c: Your total margin on new vehicles?	3.9	3.0	-0.9	-3.1
Q5d: Your current bonus and rebate rates on new car sales?	3.9	2.9	-1.0	-3.1
Q5e: Manufacturer inducement to self register vehicles?	4.4	3.2	-1.2	-3.0
Q5f: Manufacturer's new vehicle supply?	4.0	4.1	+0.1	-1.5
Q5g: The fairness of your manufacturer's new car ordering and stocking policies?	3.9	2.7	-1.2	-3.4
Q5h: The fairness of your manufacturer's demonstrator programme?	5.7	4.4	-1.3	-2.0

Question 6 - Used car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	5.1	4.3	-0.8	-2.8
Q6b: The targets set by your manufacturer for used cars?	5.4	4.7	-0.7	-2.0
Q6c: The cost and quality of your manufacturer's used car warranties?	4.6	4.6	0.0	-2.1
Q6d: Your total margin on used car sales?	5.0	6.0	+1.0	-1.1
Q6e: Your manufacturer's used car programme?	4.5	4.0	-0.5	-2.8
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	5.7	4.9	-0.8	-1.6

Question 7 - Aftersales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	5.1	4.2	-0.9	-2.3
Q7b: Quality of technical support?	5.8	3.8	-2.0	-2.5
Q7c: Availability of parts?	5.2	3.8	-1.4	-2.0
Q7d: Price of manufacturer parts compared with parts factors?	5.1	3.2	-1.9	-2.6
Q7e: Service profitability earnings?	5.5	4.8	-0.7	-1.6
Q7f: Manufacturer service plan rates and recovery?	4.5	3.9	-0.6	-2.4
Q7g: The fairness of your manufacturer's warranty policy for you and your cust...	5.8	3.7	-2.1	-2.9
Q7h: Your manufacturer's stocking policy for parts/accessories?	5.7	4.4	-1.3	-2.2

**Question 8 - Finance**

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	4.7	2.9	-1.8	-3.5
Q8b: The reasonableness of the finance targets set by your manufacturer?	5.0	3.7	-1.3	-3.1
Q8c: The earnings potential of your manufacturer's finance programme?	4.6	3.5	-1.1	-2.5
Q8d: The support you receive from your manufacturer's finance house?	4.9	3.2	-1.7	-3.3

**Question 9 - Dealer/Manufacturer relationships**

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	4.2	3.9	-0.3	-2.7
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	4.2	3.0	-1.2	-3.2
Q9c: Your manufacturer's dealer council/franchise board?	4.8	4.3	-0.5	-2.3
Q9d: Your manufacturer's response to your communications with them?	4.0	3.2	-0.8	-3.1
Q9e: Your manufacturer dealer standards are fair and reasonable?	5.0	3.9	-1.1	-2.6
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	4.0	3.6	-0.4	-2.5
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	4.7	3.0	-1.7	-3.3
Q9h: The value of manufacturer field staff to your business?	4.4	3.1	-1.3	-3.2
Q9i: The quality of your manufacturer's training?	4.6	3.5	-1.1	-3.4
Q9j: The cost of manufacturer's training?	4.4	3.0	-1.4	-3.3
Q9k: Your manufacturer's apprenticeship programme?	5.3	4.7	-0.6	-2.3
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	4.2	2.9	-1.3	-3.1

**Question 10 - Product and marketing**

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q10a: Frequency of introduction of new models?	3.9	3.3	-0.6	-3.3
Q10b: Product value and pricing?	4.0	3.7	-0.3	-2.8
Q10c: Product advertising?	4.0	3.2	-0.8	-3.2

**Question 11 - Electric vehicle/Plug-in vehicles**

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q11a: Battery Electric Vehicle products your manufacturer currently offers?	4.8	3.6	-1.2	-2.3
Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	4.8	4.1	-0.7	-2.6
Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	4.8	3.5	-1.3	-2.9
Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	4.0	3.1	-0.9	-2.2
Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	4.1	3.3	-0.8	-2.0
Q11f: With your manufacturer's support with on-site EV charging infrastructure?		2.7	-	-2.2

**Question 12 & 13 - Overall Rating**

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	3.9	2.6	-1.3	-3.7
Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	3.9	2.7	-1.2	-3.7

## Overall Manufacturer Rating

Q12: How would you rate your manufacturer overall on a scale of 1 to 10?

Winter 2022

6.3

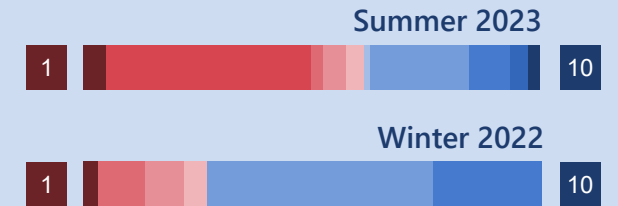
Summer 2023

4.3

Ranking vs. Winter 22  
22 vs. 18

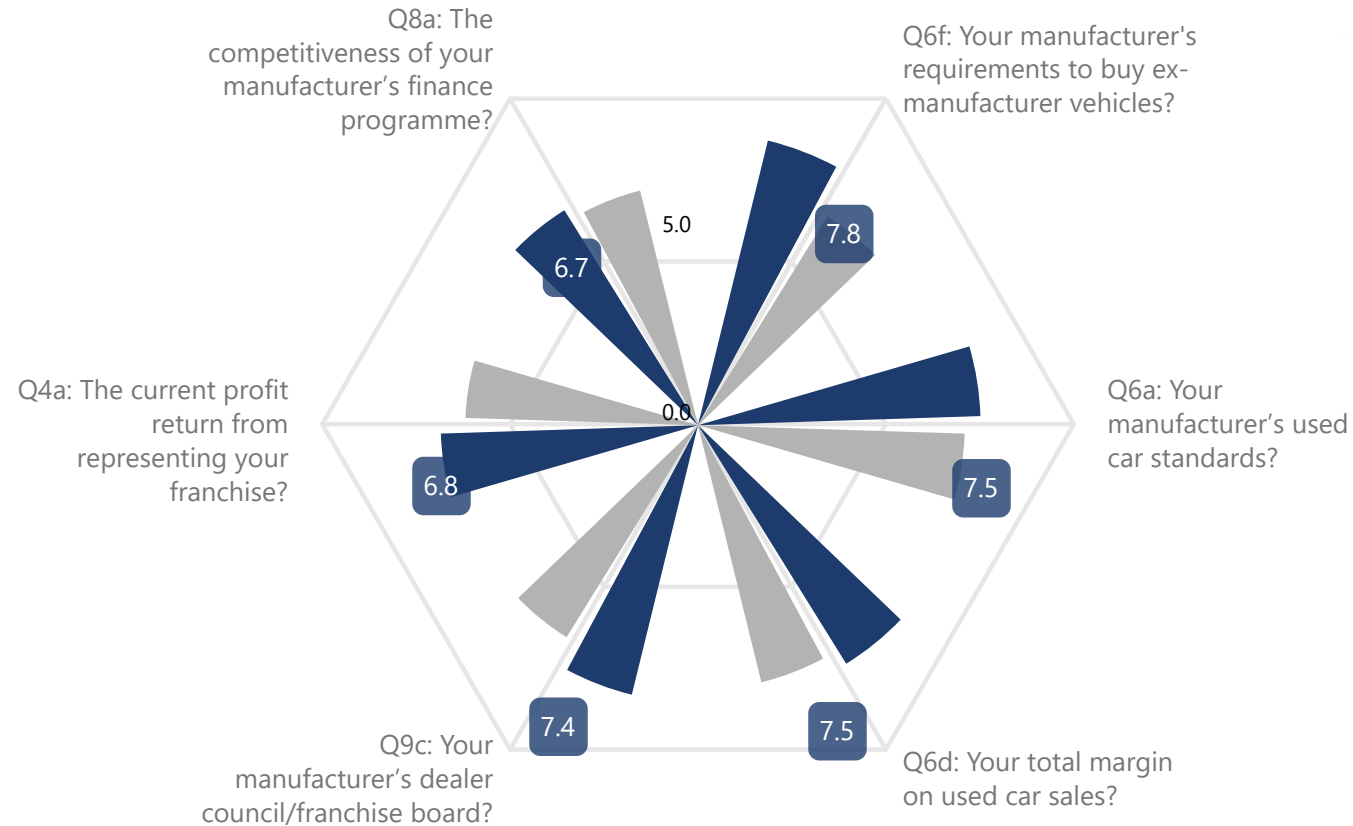
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Score Change  
**-2.0 pts**



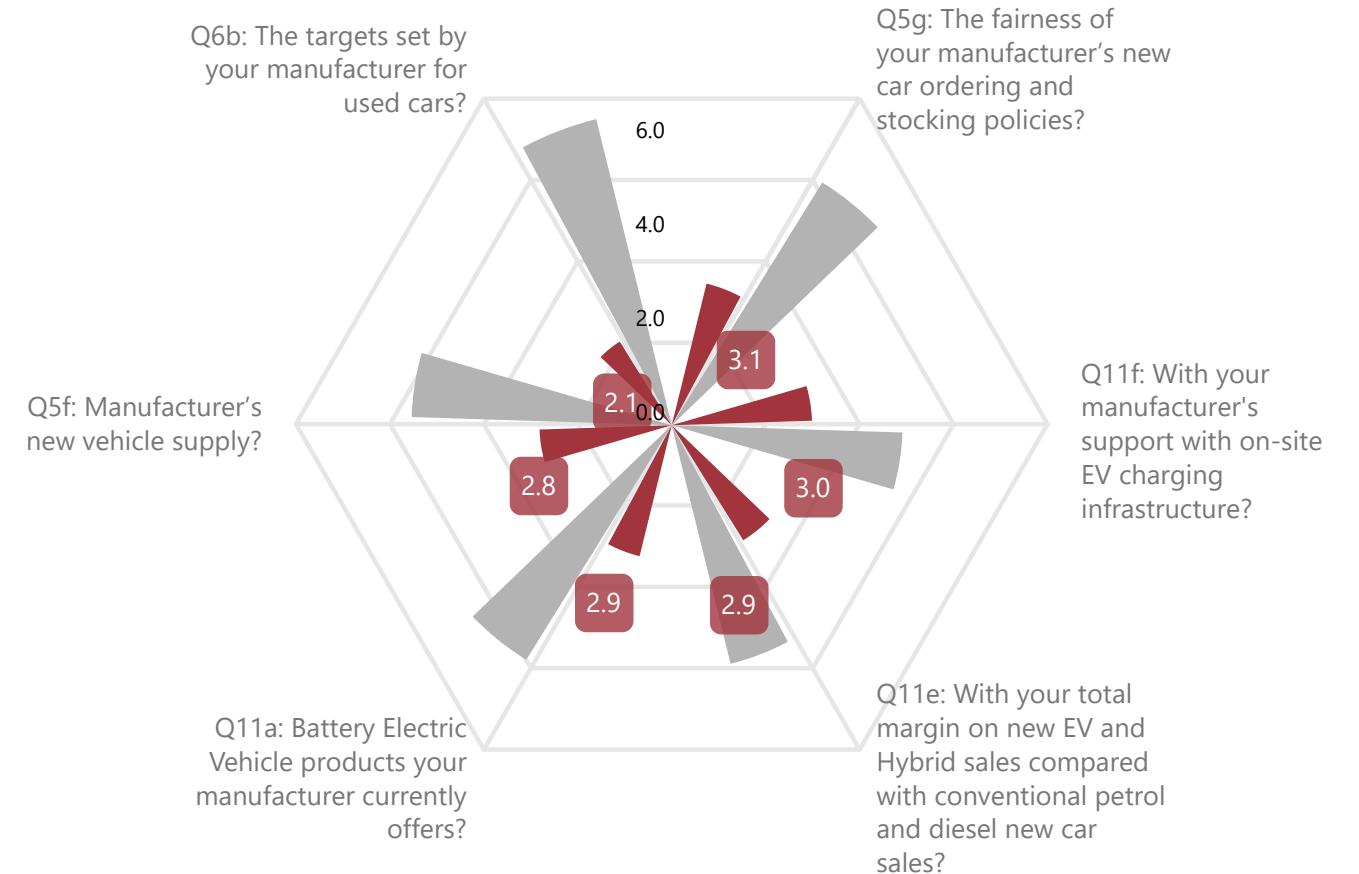
## Top 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



## Bottom 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



Question 4 - Value of the franchise	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	7.2	6.8	-0.4	+0.7
Q4b: The future profit return from representing your franchise?	5.0	4.9	-0.1	-0.9
Q4c: The required level of capital investment?	6.0	5.4	-0.6	-0.7
Q4d: The cost required in your dealership to meet franchised standards?	5.0	4.0	-1.0	-2.0
Q4e: The return on capital for your dealership?	5.6	5.3	-0.3	-0.6
Q4f: The quality of guidance provided by your manufacturer to your dealership?	6.4	4.5	-1.9	-1.5
Q4g: The financial support available to your dealership from your manufacturer?	4.5	4.8	+0.3	-0.8

Question 5 - New car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	6.9	3.5	-3.4	-2.7
Q5b: Your new car targeting process?	6.5	5.7	-0.8	-0.3
Q5c: Your total margin on new vehicles?	7.3	5.1	-2.2	-0.9
Q5d: Your current bonus and rebate rates on new car sales?	7.3	5.3	-2.0	-0.7
Q5e: Manufacturer inducement to self register vehicles?	7.5	6.1	-1.4	-0.1
Q5f: Manufacturer's new vehicle supply?	3.0	2.8	-0.2	-2.7
Q5g: The fairness of your manufacturer's new car ordering and stocking policies?	5.8	3.1	-2.7	-3.0
Q5h: The fairness of your manufacturer's demonstrator programme?	7.0	5.5	-1.5	-0.9

Question 6 - Used car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	5.8	7.5	+1.7	+0.4
Q6b: The targets set by your manufacturer for used cars?	4.5	2.1	-2.4	-4.6
Q6c: The cost and quality of your manufacturer's used car warranties?	5.7	4.3	-1.4	-2.3
Q6d: Your total margin on used car sales?	7.9	7.5	-0.4	+0.4
Q6e: Your manufacturer's used car programme?	3.5	5.2	+1.7	-1.6
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	3.8	7.8	+4.0	+1.3

Question 7 - Aftersales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	6.6	4.3	-2.3	-2.2
Q7b: Quality of technical support?	6.3	4.1	-2.2	-2.1
Q7c: Availability of parts?	5.4	3.8	-1.6	-2.0
Q7d: Price of manufacturer parts compared with parts factors?	5.0	3.5	-1.5	-2.2
Q7e: Service profitability earnings?	5.6	4.1	-1.5	-2.3
Q7f: Manufacturer service plan rates and recovery?	5.1	3.8	-1.3	-2.5
Q7g: The fairness of your manufacturer's warranty policy for you and your cust...	6.5	4.5	-2.0	-2.1
Q7h: Your manufacturer's stocking policy for parts/accessories?	7.2	4.0	-3.2	-2.6

**Question 8 - Finance**

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	7.8	6.7	-1.1	+0.3
Q8b: The reasonableness of the finance targets set by your manufacturer?	7.4	6.7	-0.7	-0.1
Q8c: The earnings potential of your manufacturer's finance programme?	5.9	6.4	+0.5	+0.4
Q8d: The support you receive from your manufacturer's finance house?	7.1	6.4	-0.7	-0.1

**Question 9 - Dealer/Manufacturer relationships**

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	6.7	4.6	-2.1	-2.0
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	5.6	3.2	-2.4	-3.0
Q9c: Your manufacturer's dealer council/franchise board?	8.2	7.4	-0.8	+0.7
Q9d: Your manufacturer's response to your communications with them?	6.1	3.8	-2.3	-2.6
Q9e: Your manufacturer dealer standards are fair and reasonable?	7.0	4.1	-2.9	-2.5
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	6.8	4.1	-2.7	-2.1
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	6.0	3.5	-2.5	-2.8
Q9h: The value of manufacturer field staff to your business?	6.3	4.0	-2.3	-2.3
Q9i: The quality of your manufacturer's training?	7.4	4.5	-2.9	-2.4
Q9j: The cost of manufacturer's training?	6.9	4.2	-2.7	-2.1
Q9k: Your manufacturer's apprenticeship programme?	7.0	4.2	-2.8	-2.8
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	5.6	3.5	-2.1	-2.5

**Question 10 - Product and marketing**

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q10a: Frequency of introduction of new models?	5.2	4.6	-0.6	-2.1
Q10b: Product value and pricing?	4.8	4.1	-0.7	-2.5
Q10c: Product advertising?	6.7	4.6	-2.1	-1.8

**Question 11 - Electric vehicle/Plug-in vehicles**

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q11a: Battery Electric Vehicle products your manufacturer currently offers?	4.0	2.9	-1.1	-3.0
Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	5.8	6.1	+0.3	-0.5
Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	6.8	4.4	-2.4	-2.0
Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	4.6	3.2	-1.4	-2.2
Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	4.8	2.9	-1.9	-2.3
Q11f: With your manufacturer's support with on-site EV charging infrastructure?		3.0	-	-1.9

**Question 12 & 13 - Overall Rating**

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	6.3	4.3	-2.0	-2.0
Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	4.8	6.2	+1.4	-0.2



## Overall Manufacturer Rating

Q12: How would you rate your manufacturer overall on a scale of 1 to 10?

Winter 2022

6.8

Summer 2023

7.1

Ranking vs. Winter 22  
12 vs. 16

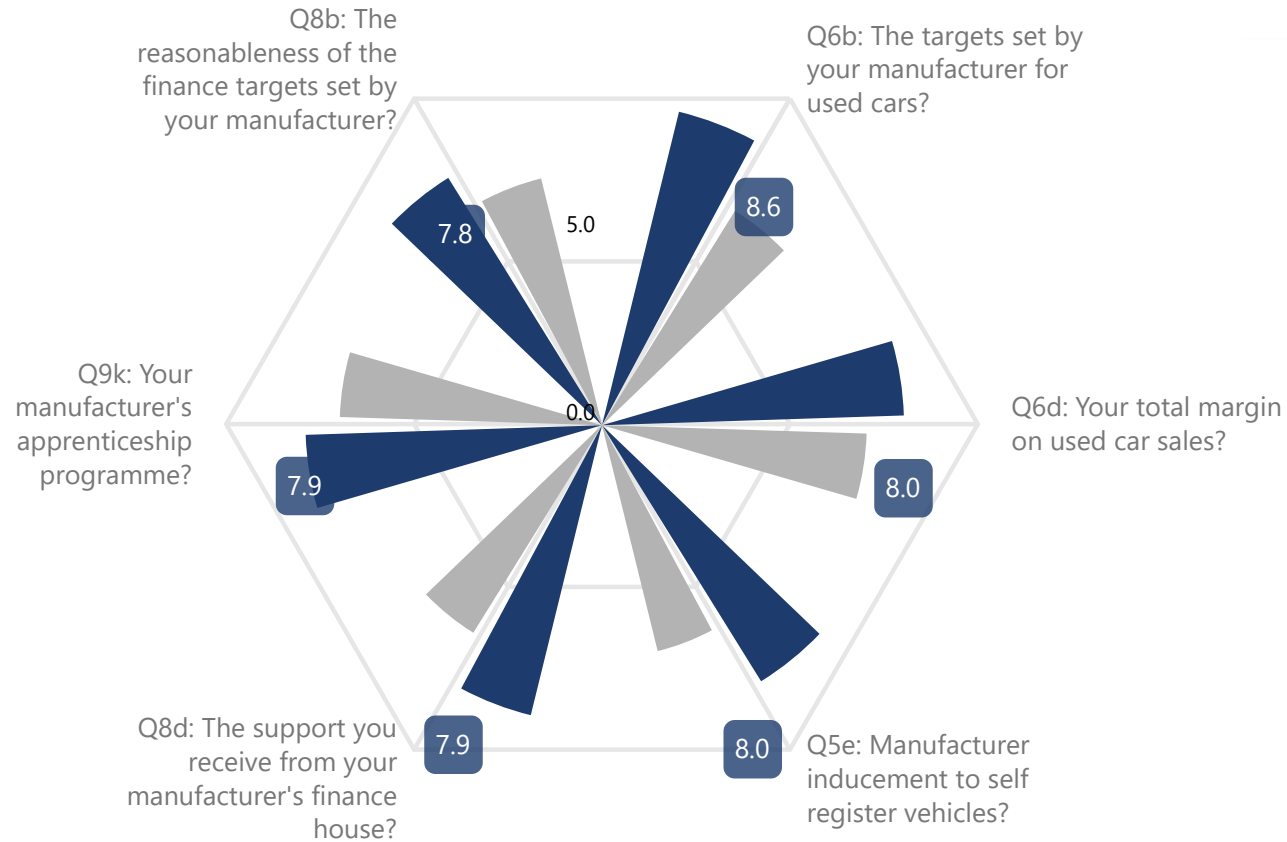
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Score Change  
**+0.3 pts**



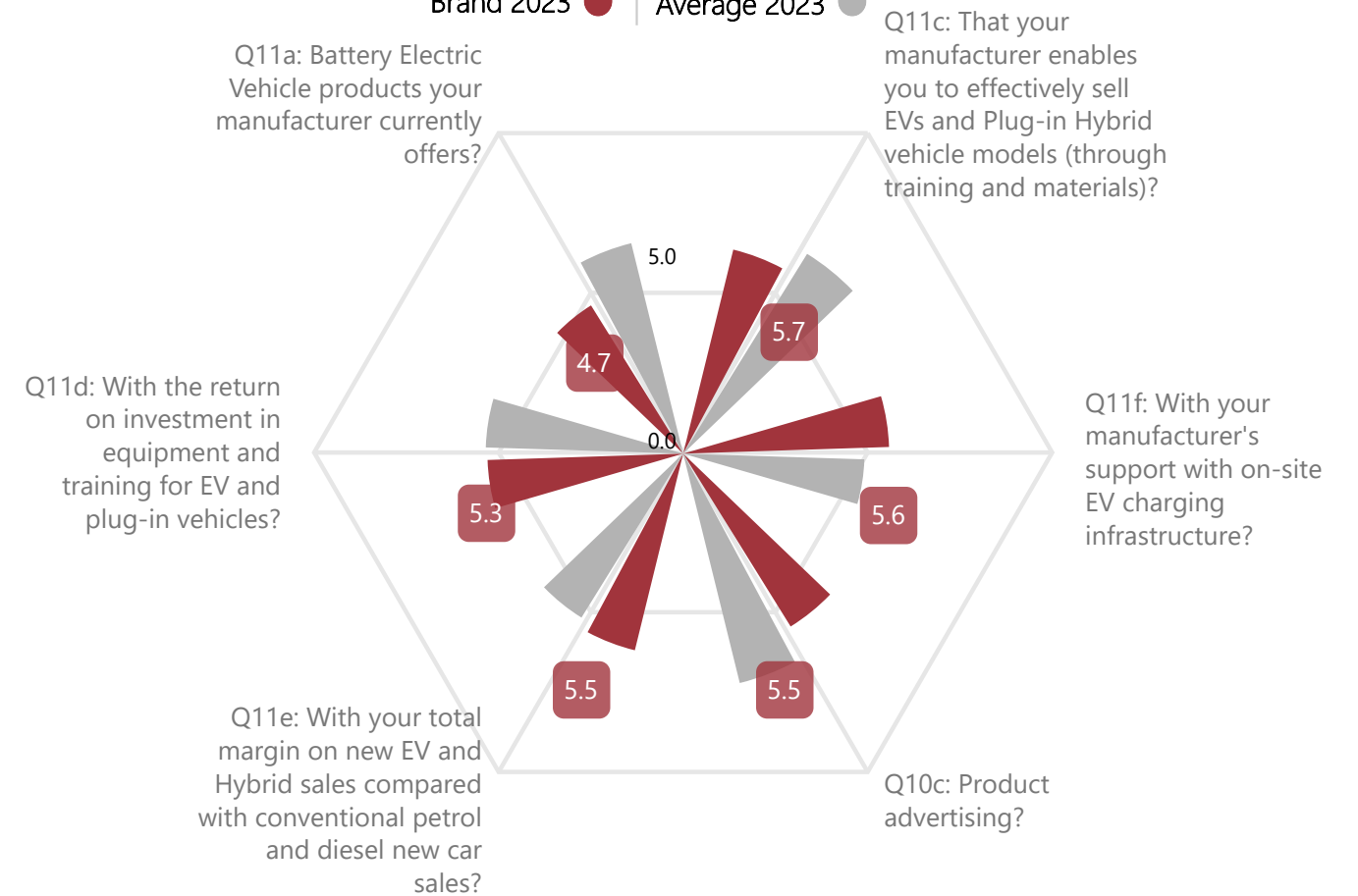
## Top 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



## Bottom 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



Question 4 - Value of the franchise	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	6.9	6.8	-0.1	+0.6
Q4b: The future profit return from representing your franchise?	7.3	6.7	-0.6	+0.9
Q4c: The required level of capital investment?	8.1	7.2	-0.9	+1.1
Q4d: The cost required in your dealership to meet franchised standards?	8.0	7.1	-0.9	+1.1
Q4e: The return on capital for your dealership?	7.9	7.3	-0.6	+1.4
Q4f: The quality of guidance provided by your manufacturer to your dealership?	7.3	6.5	-0.8	+0.5
Q4g: The financial support available to your dealership from your manufacturer?	7.3	6.8	-0.5	+1.2

Question 5 - New car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	7.1	6.5	-0.6	+0.4
Q5b: Your new car targeting process?	7.2	6.6	-0.6	+0.5
Q5c: Your total margin on new vehicles?	6.1	6.6	+0.5	+0.5
Q5d: Your current bonus and rebate rates on new car sales?	6.1	6.8	+0.7	+0.8
Q5e: Manufacturer inducement to self register vehicles?	8.1	8.0	-0.1	+1.8
Q5f: Manufacturer's new vehicle supply?	5.0	5.9	+0.9	+0.4
Q5g: The fairness of your manufacturer's new car ordering and stocking policies?	7.2	7.1	-0.1	+1.1
Q5h: The fairness of your manufacturer's demonstrator programme?	8.2	7.1	-1.1	+0.7

Question 6 - Used car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	8.1	7.6	-0.5	+0.5
Q6b: The targets set by your manufacturer for used cars?	9.1	8.6	-0.5	+1.9
Q6c: The cost and quality of your manufacturer's used car warranties?	7.9	7.7	-0.2	+1.0
Q6d: Your total margin on used car sales?	8.4	8.0	-0.4	+1.0
Q6e: Your manufacturer's used car programme?	7.4	7.6	+0.2	+0.8
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	8.2	7.7	-0.5	+1.2

Question 7 - Aftersales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	7.9	6.9	-1.0	+0.4
Q7b: Quality of technical support?	7.2	6.3	-0.9	+0.0
Q7c: Availability of parts?	7.7	7.0	-0.7	+1.2
Q7d: Price of manufacturer parts compared with parts factors?	6.3	6.0	-0.3	+0.2
Q7e: Service profitability earnings?	7.9	7.3	-0.6	+0.8
Q7f: Manufacturer service plan rates and recovery?	8.0	7.2	-0.8	+0.9
Q7g: The fairness of your manufacturer's warranty policy for you and your cust...	7.5	7.3	-0.2	+0.8
Q7h: Your manufacturer's stocking policy for parts/accessories?	8.2	7.1	-1.1	+0.5

### Question 8 - Finance

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	7.3	7.3	0.0	+0.9
Q8b: The reasonableness of the finance targets set by your manufacturer?	8.3	7.8	-0.5	+1.0
Q8c: The earnings potential of your manufacturer's finance programme?	7.2	7.1	-0.1	+1.2
Q8d: The support you receive from your manufacturer's finance house?	8.0	7.9	-0.1	+1.4

### Question 9 - Dealer/Manufacturer relationships

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	7.3	7.1	-0.2	+0.6
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	7.2	7.2	0.0	+1.0
Q9c: Your manufacturer's dealer council/franchise board?	8.0	7.4	-0.6	+0.8
Q9d: Your manufacturer's response to your communications with them?	7.6	7.1	-0.5	+0.7
Q9e: Your manufacturer dealer standards are fair and reasonable?	7.7	7.4	-0.3	+0.9
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	7.6	7.4	-0.2	+1.2
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	7.3	7.1	-0.2	+0.8
Q9h: The value of manufacturer field staff to your business?	7.0	6.9	-0.1	+0.5
Q9i: The quality of your manufacturer's training?	7.0	6.7	-0.3	-0.2
Q9j: The cost of manufacturer's training?	6.7	6.5	-0.2	+0.2
Q9k: Your manufacturer's apprenticeship programme?	7.9	7.9	0.0	+0.9
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	7.1	6.3	-0.8	+0.2

### Question 10 - Product and marketing

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q10a: Frequency of introduction of new models?	6.4	7.1	+0.7	+0.5
Q10b: Product value and pricing?	6.8	6.0	-0.8	-0.5
Q10c: Product advertising?	6.1	5.5	-0.6	-0.9

### Question 11 - Electric vehicle/Plug-in vehicles

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q11a: Battery Electric Vehicle products your manufacturer currently offers?	5.3	4.7	-0.6	-1.1
Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	7.7	6.3	-1.4	-0.3
Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	6.6	5.7	-0.9	-0.7
Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	6.2	5.3	-0.9	-0.0
Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	6.7	5.5	-1.2	+0.3
Q11f: With your manufacturer's support with on-site EV charging infrastructure?		5.6	-	+0.7

### Question 12 & 13 - Overall Rating

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	6.8	7.1	+0.3	+0.8
Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	6.9	7.2	+0.3	+0.7

## Overall Manufacturer Rating

Q12: How would you rate your manufacturer overall on a scale of 1 to 10?

Winter 2022

7.5

Summer 2023

8.1

Ranking vs. Winter 22  
**6 vs. 11**

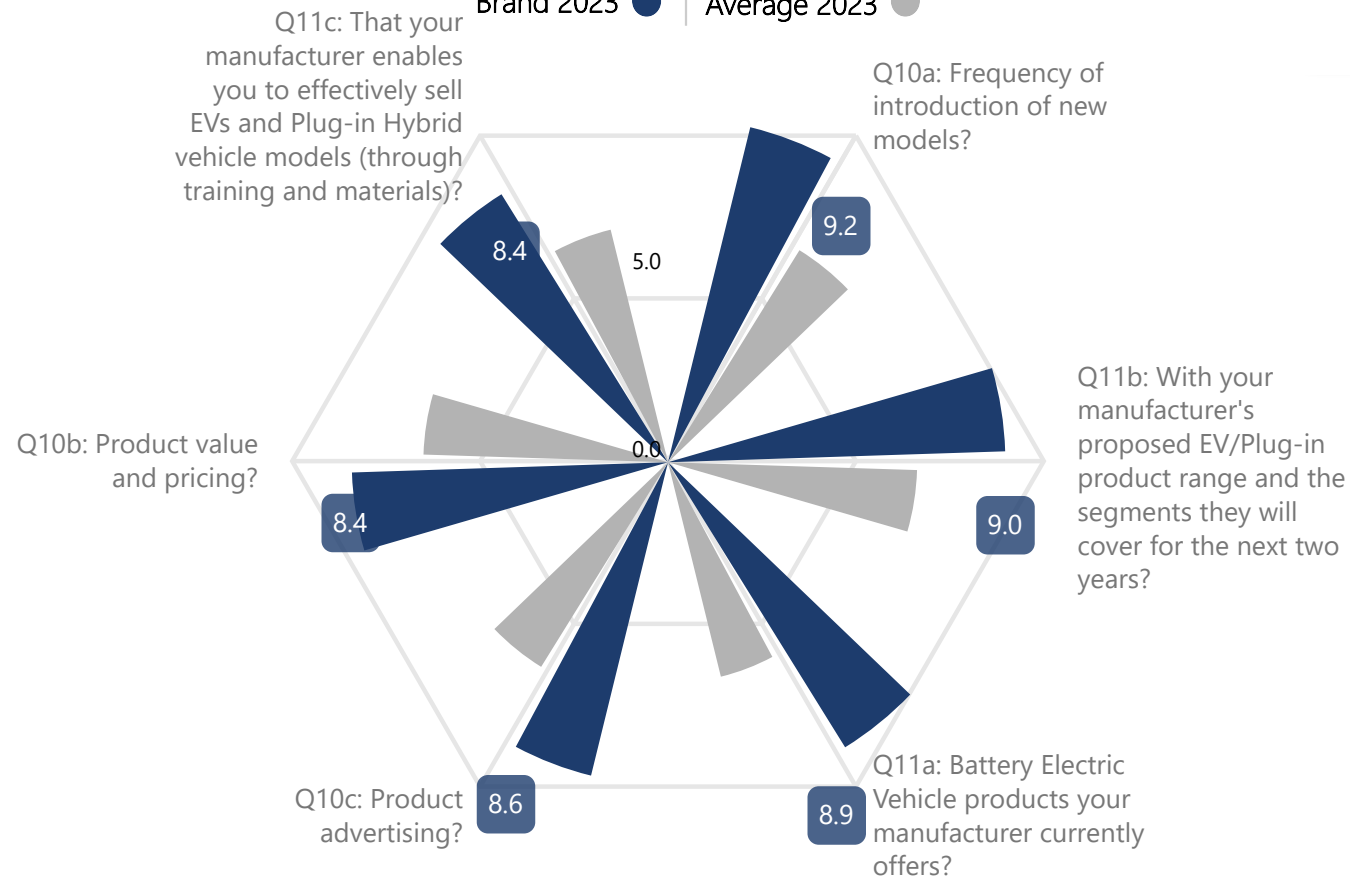
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**+8.0%**

Score Change  
**+0.6 pts**



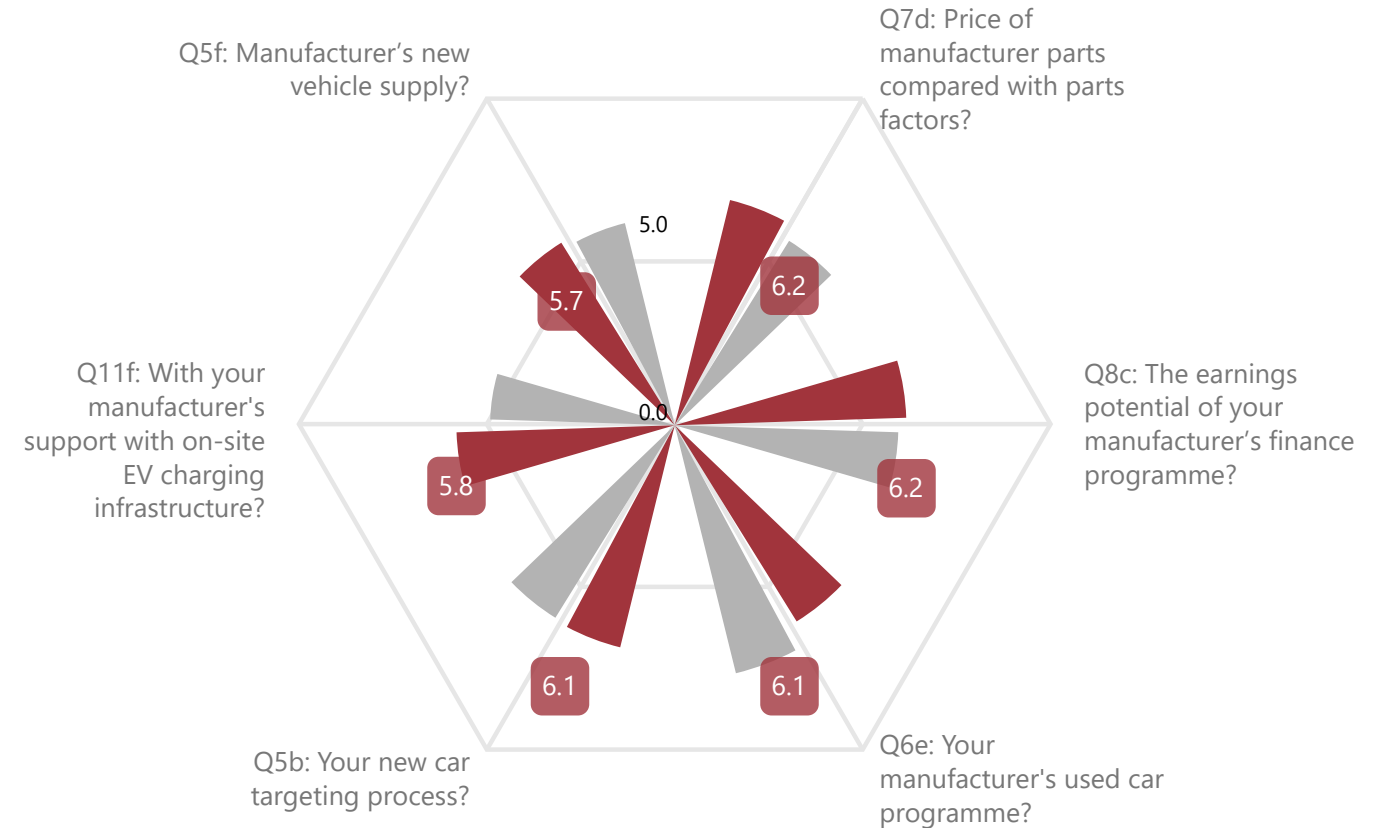
### Top 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



### Bottom 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



Question 4 - Value of the franchise	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	7.5	7.5	0.0	+1.3
Q4b: The future profit return from representing your franchise?	7.3	7.6	+0.3	+1.9
Q4c: The required level of capital investment?	6.9	7.7	+0.8	+1.6
Q4d: The cost required in your dealership to meet franchised standards?	7.1	7.7	+0.6	+1.7
Q4e: The return on capital for your dealership?	7.3	7.3	0.0	+1.3
Q4f: The quality of guidance provided by your manufacturer to your dealership?	6.7	7.1	+0.4	+1.1
Q4g: The financial support available to your dealership from your manufacturer?	6.2	6.6	+0.4	+1.0

Question 5 - New car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	5.8	6.4	+0.6	+0.3
Q5b: Your new car targeting process?	5.5	6.1	+0.6	+0.1
Q5c: Your total margin on new vehicles?	7.5	7.4	-0.1	+1.3
Q5d: Your current bonus and rebate rates on new car sales?	7.2	7.5	+0.3	+1.5
Q5e: Manufacturer inducement to self register vehicles?	7.1	6.8	-0.3	+0.6
Q5f: Manufacturer's new vehicle supply?	5.6	5.7	+0.1	+0.2
Q5g: The fairness of your manufacturer's new car ordering and stocking policies?	5.9	6.3	+0.4	+0.2
Q5h: The fairness of your manufacturer's demonstrator programme?	6.9	7.6	+0.7	+1.2

Question 6 - Used car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	6.7	7.0	+0.3	-0.1
Q6b: The targets set by your manufacturer for used cars?	6.1	7.1	+1.0	+0.4
Q6c: The cost and quality of your manufacturer's used car warranties?	6.8	6.9	+0.1	+0.3
Q6d: Your total margin on used car sales?	7.4	7.7	+0.3	+0.7
Q6e: Your manufacturer's used car programme?	5.6	6.1	+0.5	-0.7
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	6.6	7.3	+0.7	+0.8

Question 7 - Aftersales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	6.6	7.0	+0.4	+0.5
Q7b: Quality of technical support?	6.4	7.0	+0.6	+0.7
Q7c: Availability of parts?	5.7	6.4	+0.7	+0.6
Q7d: Price of manufacturer parts compared with parts factors?	5.8	6.2	+0.4	+0.4
Q7e: Service profitability earnings?	6.7	6.7	0.0	+0.3
Q7f: Manufacturer service plan rates and recovery?	6.3	6.7	+0.4	+0.3
Q7g: The fairness of your manufacturer's warranty policy for you and your cust...	7.1	7.3	+0.2	+0.8
Q7h: Your manufacturer's stocking policy for parts/accessories?	6.9	7.0	+0.1	+0.4

### Question 8 - Finance

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	7.1	7.1	0.0	+0.6
Q8b: The reasonableness of the finance targets set by your manufacturer?	7.4	7.6	+0.2	+0.8
Q8c: The earnings potential of your manufacturer's finance programme?	6.0	6.2	+0.2	+0.2
Q8d: The support you receive from your manufacturer's finance house?	7.6	7.3	-0.3	+0.8

### Question 9 - Dealer/Manufacturer relationships

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	7.2	7.6	+0.4	+1.1
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	6.1	6.8	+0.7	+0.7
Q9c: Your manufacturer's dealer council/franchise board?	7.2	6.9	-0.3	+0.3
Q9d: Your manufacturer's response to your communications with them?	6.6	7.0	+0.4	+0.6
Q9e: Your manufacturer dealer standards are fair and reasonable?	7.2	7.7	+0.5	+1.1
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	7.2	7.4	+0.2	+1.3
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	7.2	7.3	+0.1	+0.9
Q9h: The value of manufacturer field staff to your business?	6.9	7.6	+0.7	+1.2
Q9i: The quality of your manufacturer's training?	6.6	7.2	+0.6	+0.3
Q9j: The cost of manufacturer's training?	6.2	6.7	+0.5	+0.4
Q9k: Your manufacturer's apprenticeship programme?	6.6	7.2	+0.6	+0.3
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	6.9	7.3	+0.4	+1.2

### Question 10 - Product and marketing

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q10a: Frequency of introduction of new models?	8.9	9.2	+0.3	+2.5
Q10b: Product value and pricing?	7.6	8.4	+0.8	+1.9
Q10c: Product advertising?	8.2	8.6	+0.4	+2.2

### Question 11 - Electric vehicle/Plug-in vehicles

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q11a: Battery Electric Vehicle products your manufacturer currently offers?	8.6	8.9	+0.3	+3.1
Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	8.7	9.0	+0.3	+2.3
Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	8.4	8.4	0.0	+2.0
Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	7.8	7.1	-0.7	+1.8
Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	6.9	6.4	-0.5	+1.2
Q11f: With your manufacturer's support with on-site EV charging infrastructure?		5.8	-	+0.9

### Question 12 & 13 - Overall Rating

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	7.5	8.1	+0.6	+1.8
Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	7.6	8.2	+0.6	+1.8

## Overall Manufacturer Rating

Q12: How would you rate your manufacturer overall on a scale of 1 to 10?

Winter 2022

3.7

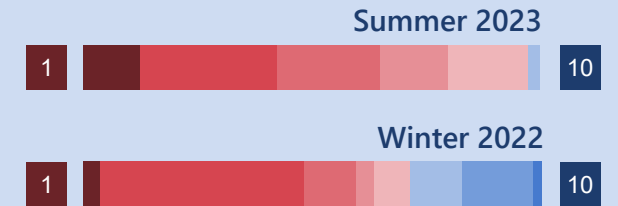
Summer 2023

3.0

Ranking vs. Winter 22  
26 vs. 30

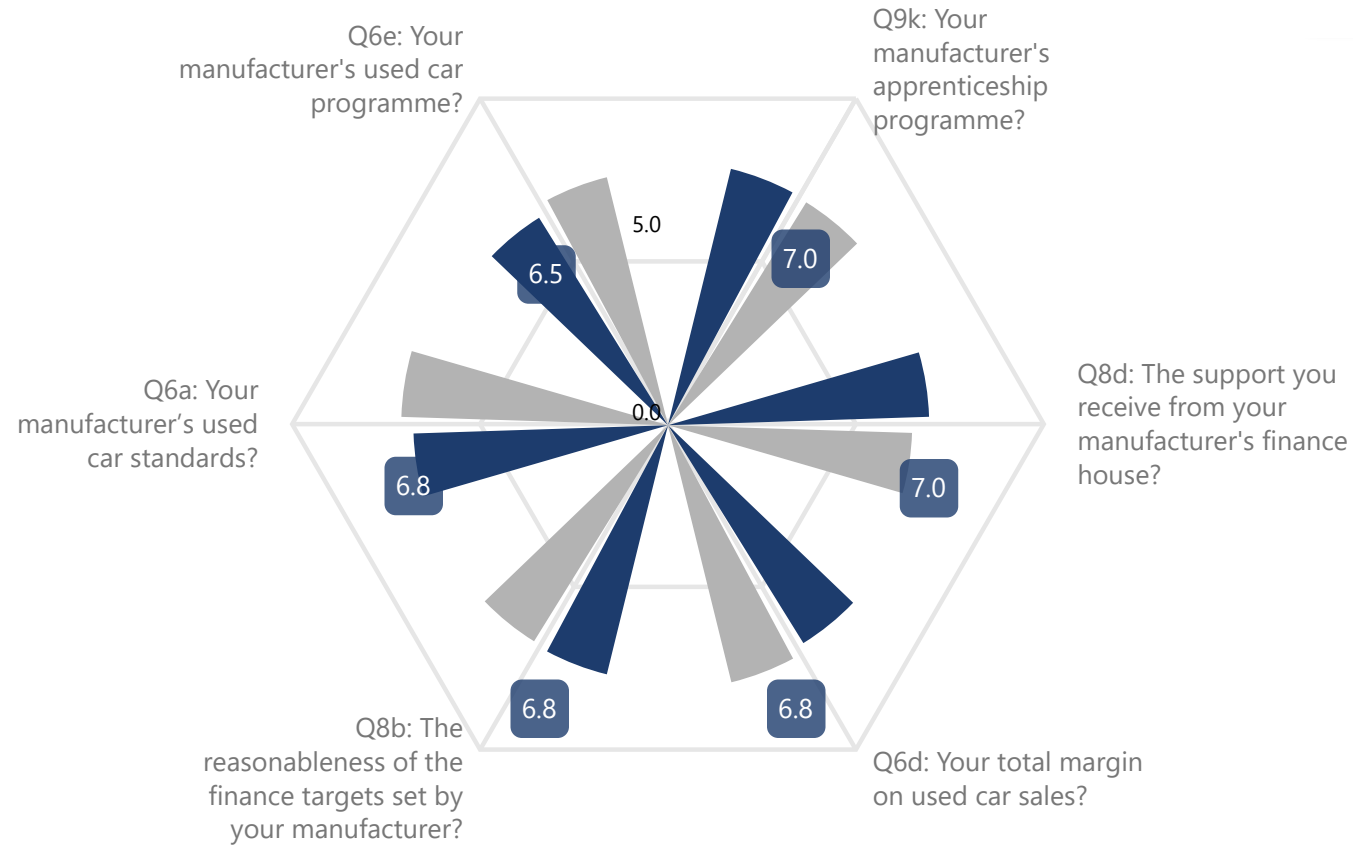
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Score Change  
**-0.7 pts**



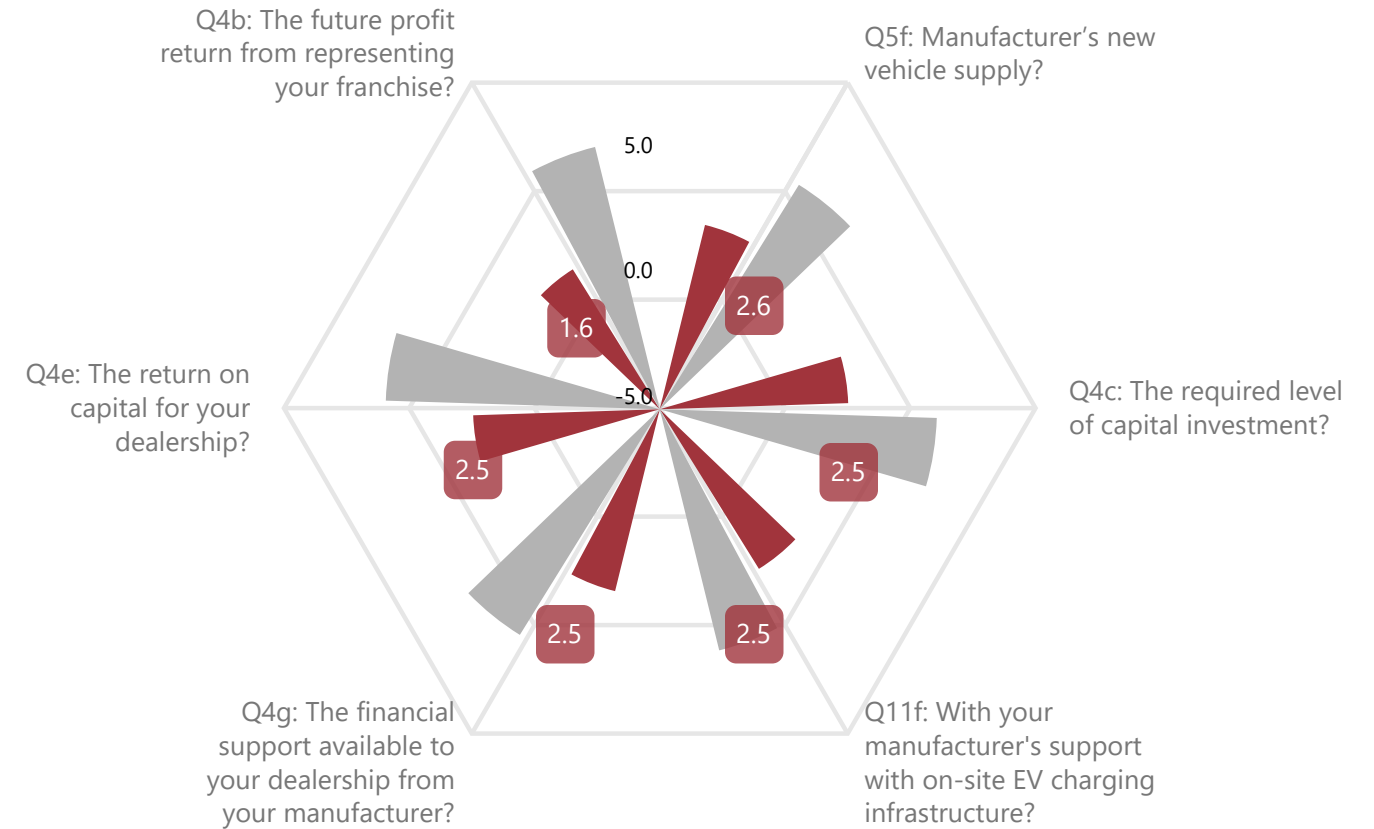
### Top 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



### Bottom 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



Question 4 - Value of the franchise	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	3.6	2.6	-1.0	-3.6
Q4b: The future profit return from representing your franchise?	3.0	1.6	-1.4	-4.2
Q4c: The required level of capital investment?	3.4	2.5	-0.9	-3.5
Q4d: The cost required in your dealership to meet franchised standards?	3.2	2.6	-0.6	-3.4
Q4e: The return on capital for your dealership?	2.8	2.5	-0.3	-3.5
Q4f: The quality of guidance provided by your manufacturer to your dealership?	3.2	3.1	-0.1	-3.0
Q4g: The financial support available to your dealership from your manufacturer?	2.5	2.5	0.0	-3.1

Question 5 - New car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	3.7	3.8	+0.1	-2.4
Q5b: Your new car targeting process?	4.4	4.5	+0.1	-1.6
Q5c: Your total margin on new vehicles?	4.6	5.1	+0.5	-0.9
Q5d: Your current bonus and rebate rates on new car sales?	4.2	4.5	+0.3	-1.5
Q5e: Manufacturer inducement to self register vehicles?	5.9	5.4	-0.5	-0.8
Q5f: Manufacturer's new vehicle supply?	1.8	2.6	+0.8	-3.0
Q5g: The fairness of your manufacturer's new car ordering and stocking policies?	3.8	4.5	+0.7	-1.6
Q5h: The fairness of your manufacturer's demonstrator programme?	4.9	4.6	-0.3	-1.8

Question 6 - Used car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	6.7	6.8	+0.1	-0.3
Q6b: The targets set by your manufacturer for used cars?	6.3	6.5	+0.2	-0.3
Q6c: The cost and quality of your manufacturer's used car warranties?	6.3	5.3	-1.0	-1.4
Q6d: Your total margin on used car sales?	7.4	6.8	-0.6	-0.2
Q6e: Your manufacturer's used car programme?	6.5	6.5	0.0	-0.3
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	4.4	5.5	+1.1	-1.1

Question 7 - Aftersales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	5.4	6.0	+0.6	-0.5
Q7b: Quality of technical support?	5.7	6.2	+0.5	-0.1
Q7c: Availability of parts?	3.5	3.0	-0.5	-2.8
Q7d: Price of manufacturer parts compared with parts factors?	4.1	4.0	-0.1	-1.8
Q7e: Service profitability earnings?	4.9	4.9	0.0	-1.5
Q7f: Manufacturer service plan rates and recovery?	4.1	5.6	+1.5	-0.7
Q7g: The fairness of your manufacturer's warranty policy for you and your cust...	5.1	6.4	+1.3	-0.2
Q7h: Your manufacturer's stocking policy for parts/accessories?	6.3	6.1	-0.2	-0.6



### Question 8 - Finance

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	4.9	6.0	+1.1	-0.4
Q8b: The reasonableness of the finance targets set by your manufacturer?	5.2	6.8	+1.6	+0.1
Q8c: The earnings potential of your manufacturer's finance programme?	5.3	6.3	+1.0	+0.3
Q8d: The support you receive from your manufacturer's finance house?	5.6	7.0	+1.4	+0.5

### Question 9 - Dealer/Manufacturer relationships

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	4.8	5.7	+0.9	-0.9
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	4.0	4.9	+0.9	-1.3
Q9c: Your manufacturer's dealer council/franchise board?	5.0	5.6	+0.6	-1.0
Q9d: Your manufacturer's response to your communications with them?	4.2	5.9	+1.7	-0.5
Q9e: Your manufacturer dealer standards are fair and reasonable?	5.8	4.9	-0.9	-1.6
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	4.4	5.5	+1.1	-0.7
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	4.8	5.2	+0.4	-1.1
Q9h: The value of manufacturer field staff to your business?	5.0	5.0	0.0	-1.3
Q9i: The quality of your manufacturer's training?	6.3	5.9	-0.4	-1.0
Q9j: The cost of manufacturer's training?	5.2	4.9	-0.3	-1.4
Q9k: Your manufacturer's apprenticeship programme?	7.4	7.0	-0.4	+0.0
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	2.7	2.8	+0.1	-3.2

### Question 10 - Product and marketing

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q10a: Frequency of introduction of new models?	2.7	3.7	+1.0	-3.0
Q10b: Product value and pricing?	3.4	4.1	+0.7	-2.5
Q10c: Product advertising?	3.2	3.8	+0.6	-2.6

### Question 11 - Electric vehicle/Plug-in vehicles

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q11a: Battery Electric Vehicle products your manufacturer currently offers?	5.3	4.0	-1.3	-1.9
Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	4.1	3.5	-0.6	-3.2
Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	5.3	5.6	+0.3	-0.8
Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	4.3	3.3	-1.0	-2.1
Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	5.0	4.2	-0.8	-1.0
Q11f: With your manufacturer's support with on-site EV charging infrastructure?		2.5	-	-2.4

### Question 12 & 13 - Overall Rating

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	3.7	3.0	-0.7	-3.3
Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	3.4	2.9	-0.5	-3.6

## Overall Manufacturer Rating

Q12: How would you rate your manufacturer overall on a scale of 1 to 10?

Winter 2022

4.0

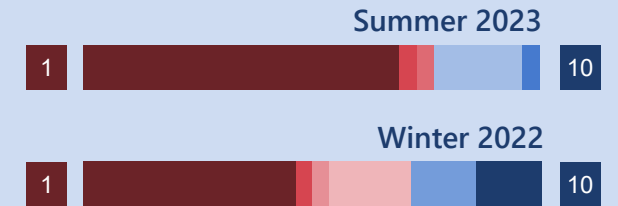
Summer 2023

2.3

Ranking vs. Winter 22  
**31 vs. 26**

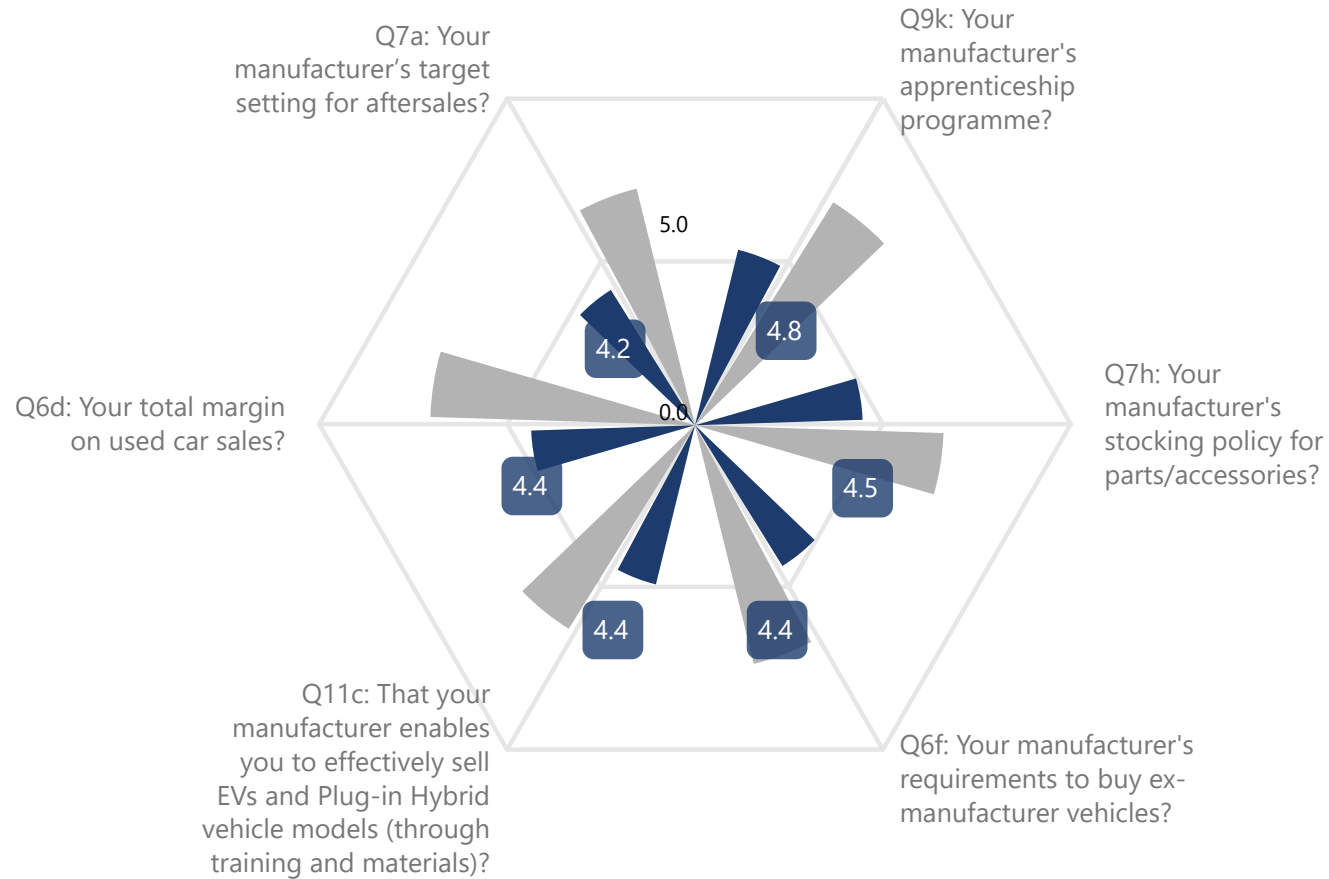
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Score Change  
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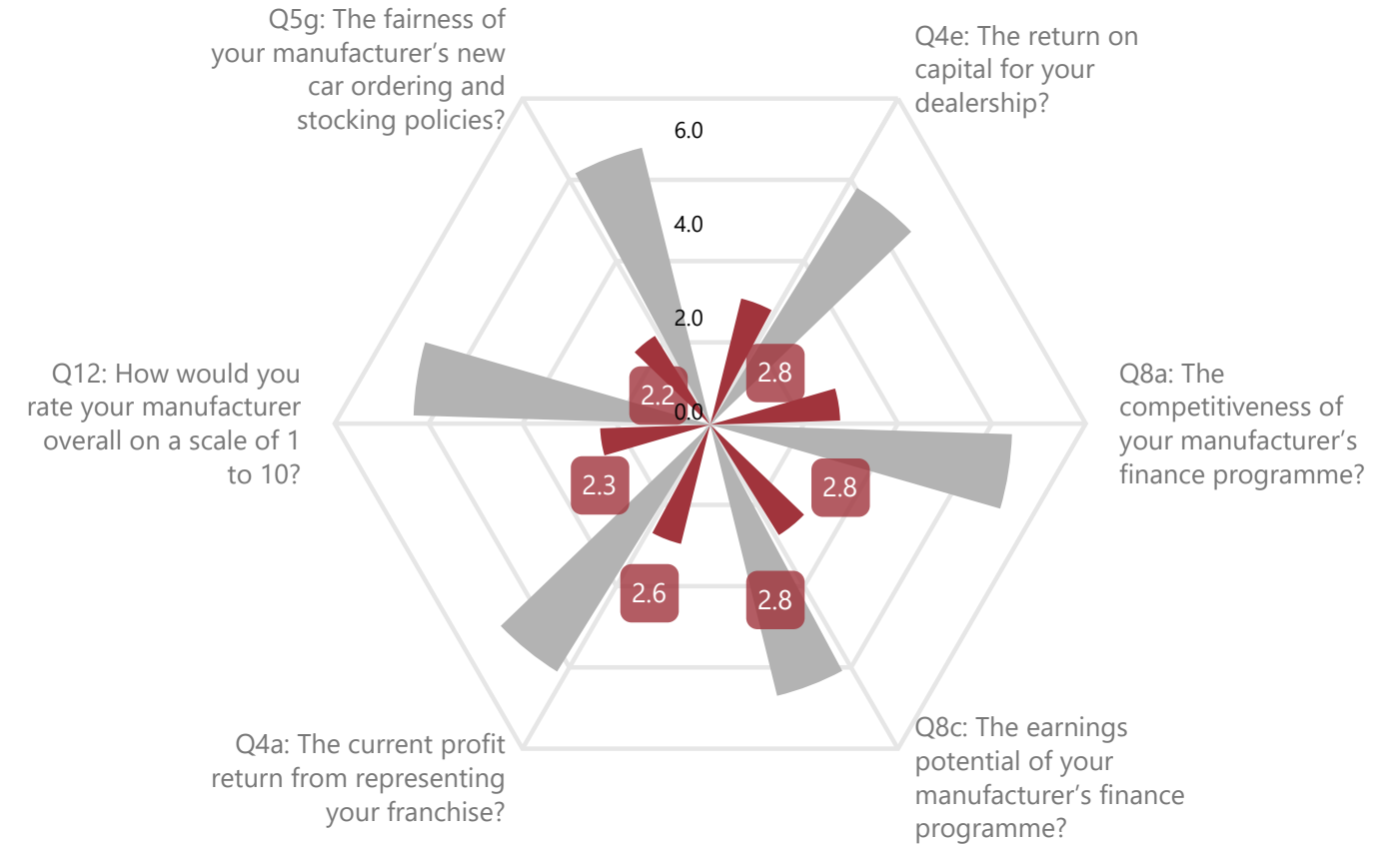
### Top 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



### Bottom 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



Question 4 - Value of the franchise	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	3.1	2.6	-0.5	-3.6
Q4b: The future profit return from representing your franchise?	4.0	3.5	-0.5	-2.3
Q4c: The required level of capital investment?	4.1	3.1	-1.0	-2.9
Q4d: The cost required in your dealership to meet franchised standards?	4.2	3.2	-1.0	-2.8
Q4e: The return on capital for your dealership?	3.4	2.8	-0.6	-3.2
Q4f: The quality of guidance provided by your manufacturer to your dealership?	3.9	2.8	-1.1	-3.2
Q4g: The financial support available to your dealership from your manufacturer?	3.4	3.0	-0.4	-2.6

Question 5 - New car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	3.6	3.0	-0.6	-3.2
Q5b: Your new car targeting process?	3.5	3.0	-0.5	-3.0
Q5c: Your total margin on new vehicles?	4.4	3.5	-0.9	-2.5
Q5d: Your current bonus and rebate rates on new car sales?	4.3	2.9	-1.4	-3.1
Q5e: Manufacturer inducement to self register vehicles?	4.5	3.3	-1.2	-2.8
Q5f: Manufacturer's new vehicle supply?	3.0	3.6	+0.6	-1.9
Q5g: The fairness of your manufacturer's new car ordering and stocking policies?	3.6	2.2	-1.4	-3.9
Q5h: The fairness of your manufacturer's demonstrator programme?	5.1	4.1	-1.0	-2.3

Question 6 - Used car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	4.2	3.9	-0.3	-3.2
Q6b: The targets set by your manufacturer for used cars?	5.0	3.8	-1.2	-2.9
Q6c: The cost and quality of your manufacturer's used car warranties?	4.1	3.8	-0.3	-2.9
Q6d: Your total margin on used car sales?	4.7	4.4	-0.3	-2.7
Q6e: Your manufacturer's used car programme?	4.3	3.7	-0.6	-3.1
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	5.4	4.4	-1.0	-2.1

Question 7 - Aftersales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	4.6	4.2	-0.4	-2.2
Q7b: Quality of technical support?	5.6	3.2	-2.4	-3.1
Q7c: Availability of parts?	4.1	3.2	-0.9	-2.6
Q7d: Price of manufacturer parts compared with parts factors?	4.1	3.4	-0.7	-2.4
Q7e: Service profitability earnings?	4.7	4.0	-0.7	-2.5
Q7f: Manufacturer service plan rates and recovery?	4.1	3.6	-0.5	-2.7
Q7g: The fairness of your manufacturer's warranty policy for you and your cust...	5.4	3.3	-2.1	-3.3
Q7h: Your manufacturer's stocking policy for parts/accessories?	5.1	4.5	-0.6	-2.2

### Question 8 - Finance

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	4.1	2.8	-1.3	-3.7
Q8b: The reasonableness of the finance targets set by your manufacturer?	4.4	3.1	-1.3	-3.7
Q8c: The earnings potential of your manufacturer's finance programme?	4.3	2.8	-1.5	-3.2
Q8d: The support you receive from your manufacturer's finance house?	4.7	2.8	-1.9	-3.7

### Question 9 - Dealer/Manufacturer relationships

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	4.1	3.5	-0.6	-3.1
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	4.0	3.2	-0.8	-2.9
Q9c: Your manufacturer's dealer council/franchise board?	5.1	4.2	-0.9	-2.5
Q9d: Your manufacturer's response to your communications with them?	4.2	3.4	-0.8	-2.9
Q9e: Your manufacturer dealer standards are fair and reasonable?	4.1	3.9	-0.2	-2.7
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	4.6	3.3	-1.3	-2.8
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	4.3	4.0	-0.3	-2.3
Q9h: The value of manufacturer field staff to your business?	4.5	3.8	-0.7	-2.6
Q9i: The quality of your manufacturer's training?	4.2	4.2	0.0	-2.7
Q9j: The cost of manufacturer's training?	4.3	3.0	-1.3	-3.3
Q9k: Your manufacturer's apprenticeship programme?	4.8	4.8	0.0	-2.2
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	4.0	3.1	-0.9	-2.9

### Question 10 - Product and marketing

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q10a: Frequency of introduction of new models?	3.9	3.3	-0.6	-3.4
Q10b: Product value and pricing?	3.9	3.2	-0.7	-3.3
Q10c: Product advertising?	4.5	3.2	-1.3	-3.3

### Question 11 - Electric vehicle/Plug-in vehicles

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q11a: Battery Electric Vehicle products your manufacturer currently offers?	3.9	3.7	-0.2	-2.2
Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	4.9	3.9	-1.0	-2.7
Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	4.4	4.4	0.0	-2.0
Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	3.9	3.1	-0.8	-2.2
Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	3.9	3.2	-0.7	-2.0
Q11f: With your manufacturer's support with on-site EV charging infrastructure?		3.0	-	-1.9

### Question 12 & 13 - Overall Rating

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	4.0	2.3	-1.7	-4.0
Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	4.0	2.8	-1.2	-3.6

## Overall Manufacturer Rating

Q12: How would you rate your manufacturer overall on a scale of 1 to 10?

Winter 2022

9.3

Summer 2023

9.5

Ranking vs. Winter 22  
**1 vs. 1**

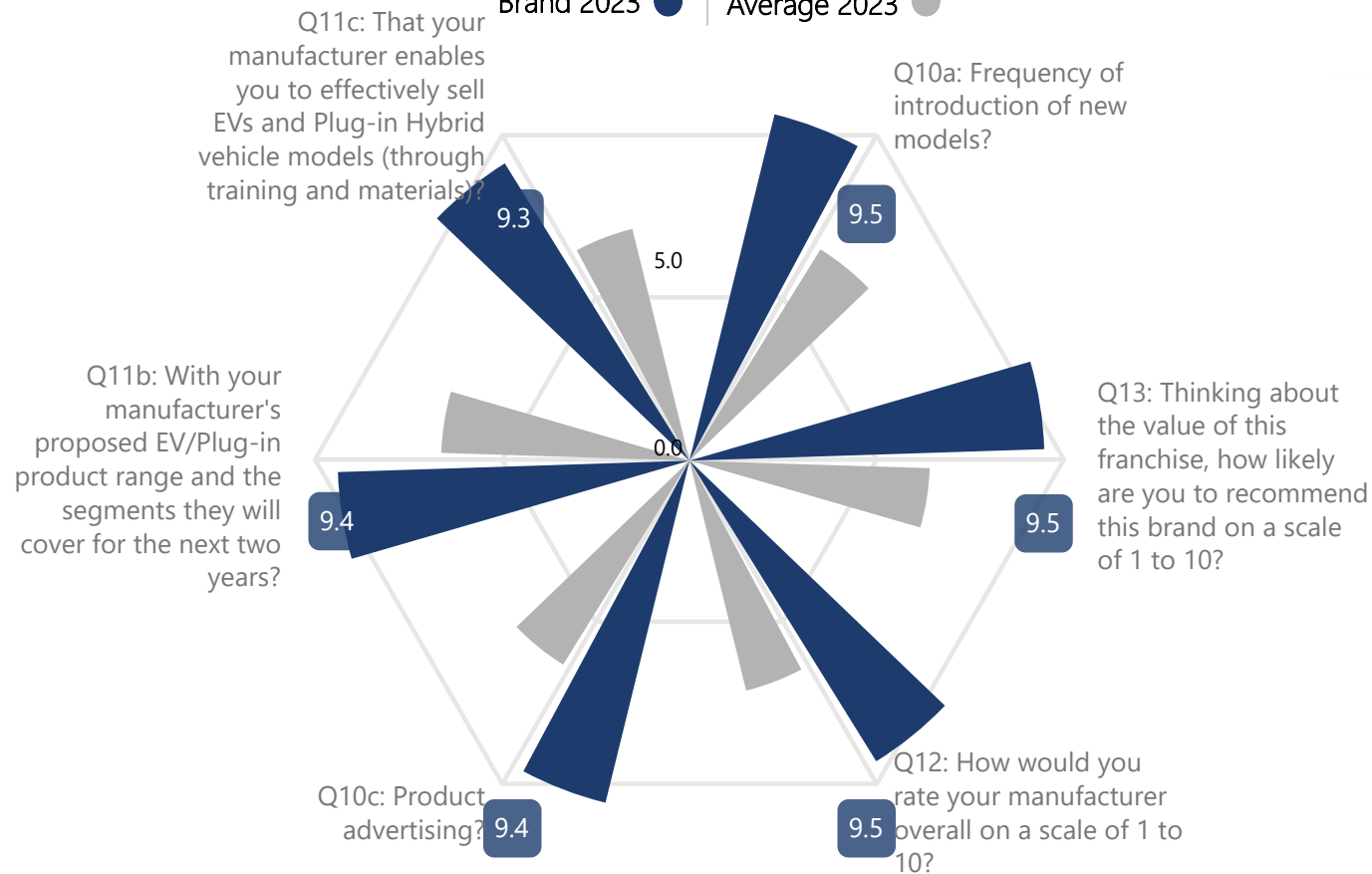
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Score Change  
**+0.2 pts**



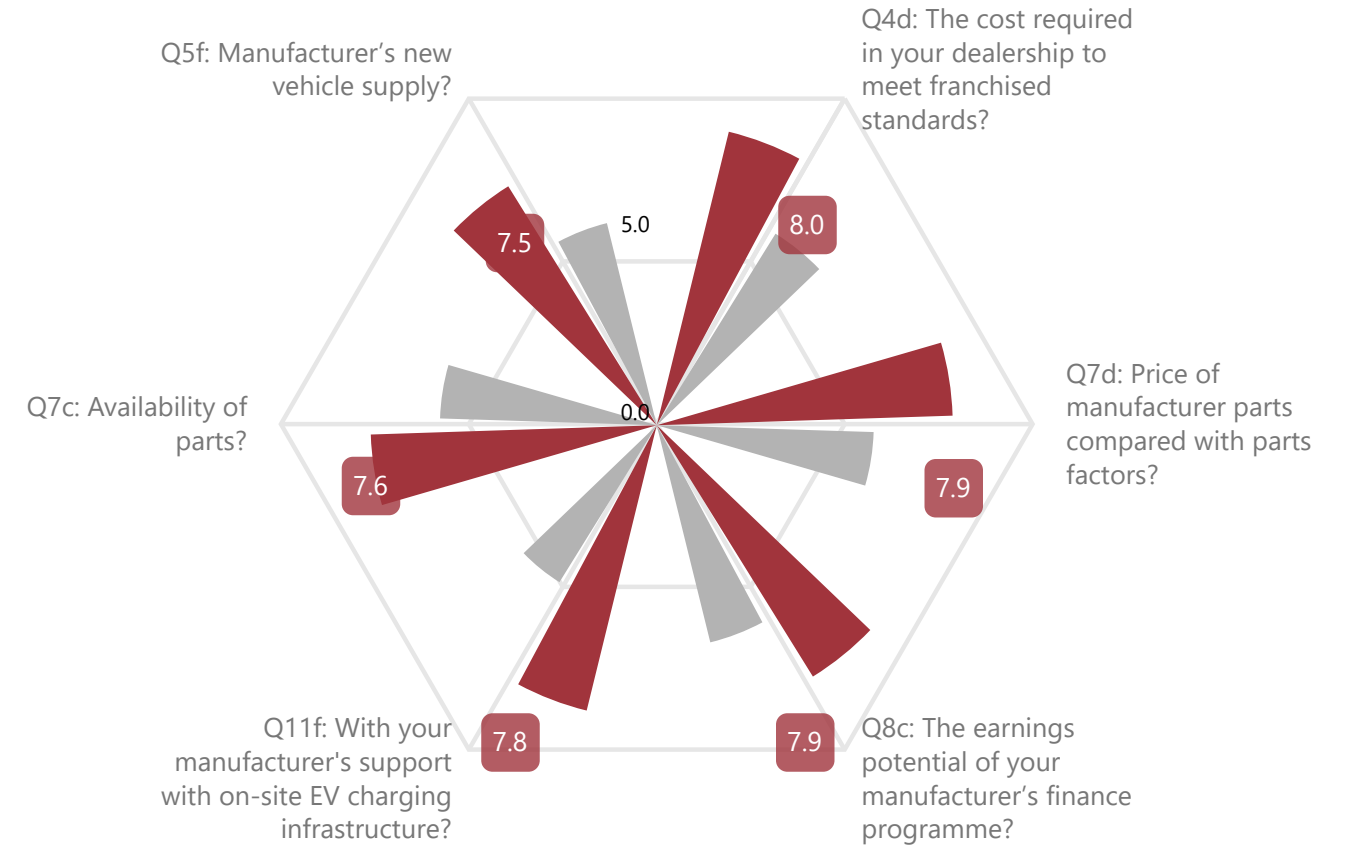
### Top 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



### Bottom 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



Question 4 - Value of the franchise	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	9.0	9.1	+0.1	+2.9
Q4b: The future profit return from representing your franchise?	8.9	9.0	+0.1	+3.2
Q4c: The required level of capital investment?	8.0	8.3	+0.3	+2.2
Q4d: The cost required in your dealership to meet franchised standards?	8.2	8.0	-0.2	+2.0
Q4e: The return on capital for your dealership?	8.7	8.7	0.0	+2.7
Q4f: The quality of guidance provided by your manufacturer to your dealership?	8.9	8.9	0.0	+2.8
Q4g: The financial support available to your dealership from your manufacturer?	8.4	8.2	-0.2	+2.6

Question 5 - New car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	8.3	8.6	+0.3	+2.4
Q5b: Your new car targeting process?	7.9	8.2	+0.3	+2.2
Q5c: Your total margin on new vehicles?	8.8	8.5	-0.3	+2.4
Q5d: Your current bonus and rebate rates on new car sales?	8.5	8.5	0.0	+2.6
Q5e: Manufacturer inducement to self register vehicles?	8.7	8.9	+0.2	+2.7
Q5f: Manufacturer's new vehicle supply?	7.5	7.5	0.0	+1.9
Q5g: The fairness of your manufacturer's new car ordering and stocking policies?	8.2	8.7	+0.5	+2.6
Q5h: The fairness of your manufacturer's demonstrator programme?	8.4	8.7	+0.3	+2.3

Question 6 - Used car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	9.2	9.3	+0.1	+2.2
Q6b: The targets set by your manufacturer for used cars?	9.1	9.2	+0.1	+2.5
Q6c: The cost and quality of your manufacturer's used car warranties?	9.5	9.0	-0.5	+2.3
Q6d: Your total margin on used car sales?	9.1	8.9	-0.2	+1.8
Q6e: Your manufacturer's used car programme?	8.9	9.1	+0.2	+2.3
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	9.2	8.8	-0.4	+2.2

Question 7 - Aftersales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	8.3	8.4	+0.1	+1.9
Q7b: Quality of technical support?	8.3	8.1	-0.2	+1.9
Q7c: Availability of parts?	7.6	7.6	0.0	+1.8
Q7d: Price of manufacturer parts compared with parts factors?	8.0	7.9	-0.1	+2.1
Q7e: Service profitability earnings?	8.1	8.2	+0.1	+1.8
Q7f: Manufacturer service plan rates and recovery?	8.4	8.1	-0.3	+1.8
Q7g: The fairness of your manufacturer's warranty policy for you and your cust...	8.5	8.5	0.0	+1.9
Q7h: Your manufacturer's stocking policy for parts/accessories?	8.7	8.4	-0.3	+1.8

**Question 8 - Finance**

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	8.5	8.4	-0.1	+2.0
Q8b: The reasonableness of the finance targets set by your manufacturer?	8.7	8.7	0.0	+1.9
Q8c: The earnings potential of your manufacturer's finance programme?	7.9	7.9	0.0	+1.9
Q8d: The support you receive from your manufacturer's finance house?	8.4	8.5	+0.1	+2.0

**Question 9 - Dealer/Manufacturer relationships**

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	9.3	9.3	0.0	+2.7
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	8.9	8.9	0.0	+2.8
Q9c: Your manufacturer's dealer council/franchise board?	8.7	8.6	-0.1	+2.0
Q9d: Your manufacturer's response to your communications with them?	8.9	8.7	-0.2	+2.3
Q9e: Your manufacturer dealer standards are fair and reasonable?	9.0	9.3	+0.3	+2.7
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	9.1	9.0	-0.1	+2.8
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	8.9	9.0	+0.1	+2.6
Q9h: The value of manufacturer field staff to your business?	8.8	8.6	-0.2	+2.2
Q9i: The quality of your manufacturer's training?	8.8	9.0	+0.2	+2.1
Q9j: The cost of manufacturer's training?	8.7	8.6	-0.1	+2.3
Q9k: Your manufacturer's apprenticeship programme?	8.9	8.9	0.0	+1.9
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	9.2	9.1	-0.1	+3.1

**Question 10 - Product and marketing**

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q10a: Frequency of introduction of new models?	9.3	9.5	+0.2	+2.9
Q10b: Product value and pricing?	8.8	9.0	+0.2	+2.5
Q10c: Product advertising?	9.2	9.4	+0.2	+3.0

**Question 11 - Electric vehicle/Plug-in vehicles**

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q11a: Battery Electric Vehicle products your manufacturer currently offers?	9.3	9.3	0.0	+3.4
Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	9.4	9.4	0.0	+2.8
Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	9.2	9.3	+0.1	+3.0
Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	8.9	8.5	-0.4	+3.1
Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	8.6	8.1	-0.5	+2.9
Q11f: With your manufacturer's support with on-site EV charging infrastructure?		7.8	-	+2.9

**Question 12 & 13 - Overall Rating**

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	9.3	9.5	+0.2	+3.1
Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	9.4	9.5	+0.1	+3.1

## Overall Manufacturer Rating

Q12: How would you rate your manufacturer overall on a scale of 1 to 10?

Winter 2022

7.0

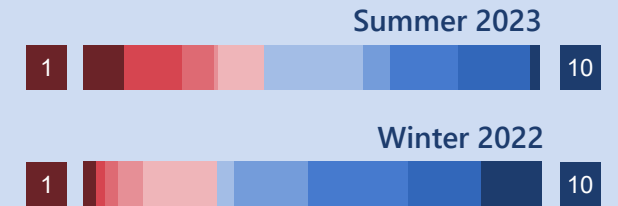
Summer 2023

5.6

Ranking vs. Winter 22  
19 vs. 14

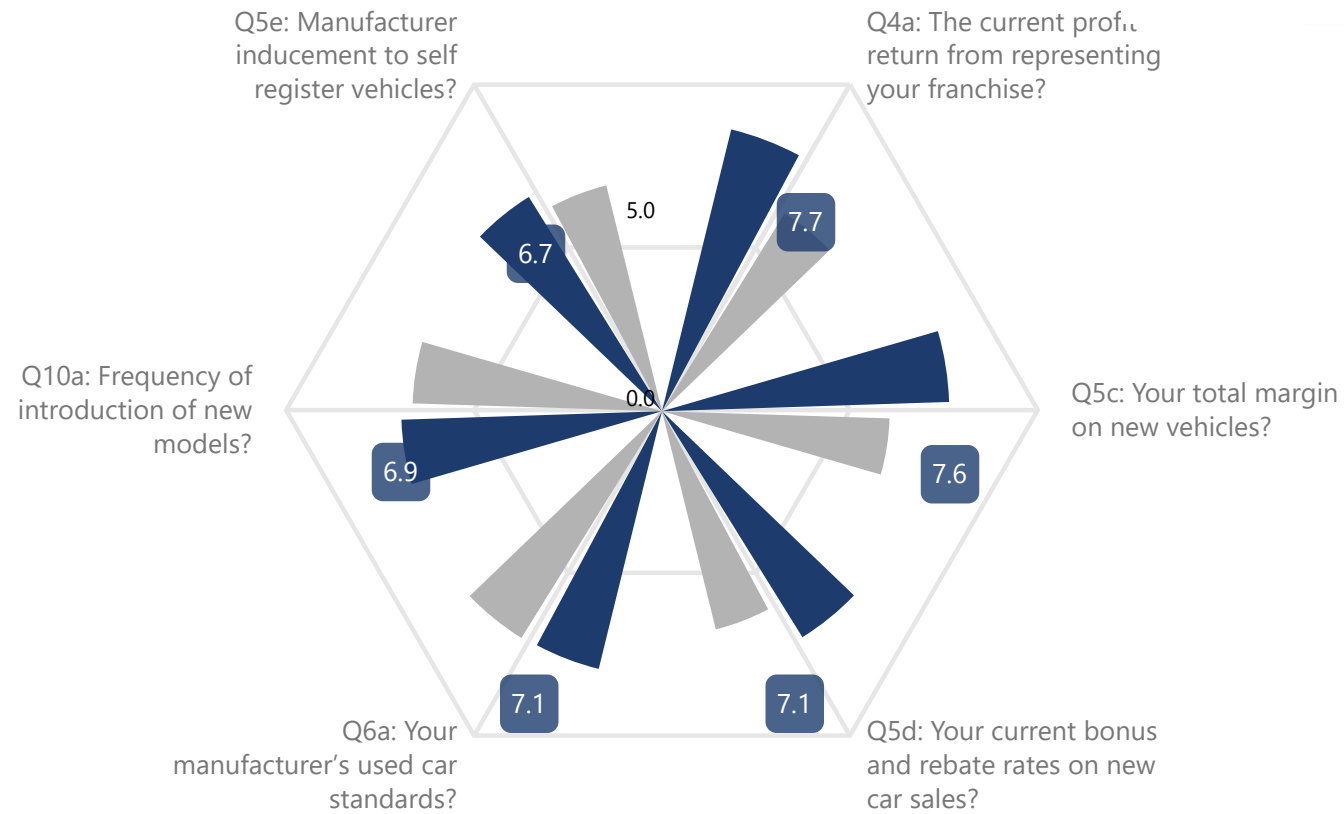
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Score Change  
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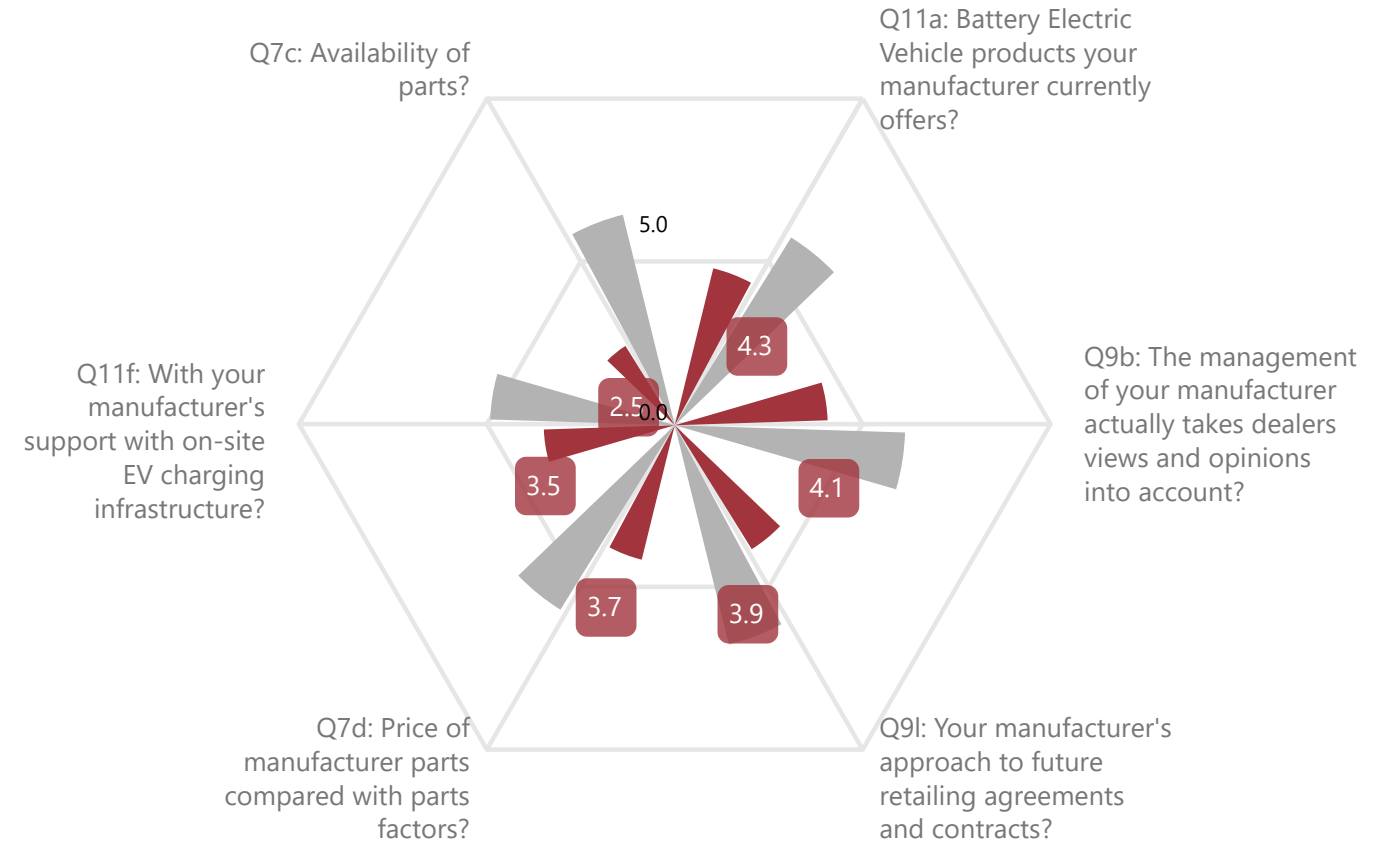
### Top 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



### Bottom 6 Questions vs Average

Brand 2023 ● | Average 2023 ●





Question 4 - Value of the franchise	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	8.1	7.7	-0.4	+1.5
Q4b: The future profit return from representing your franchise?	7.5	4.4	-3.1	-1.3
Q4c: The required level of capital investment?	6.5	4.7	-1.8	-1.4
Q4d: The cost required in your dealership to meet franchised standards?	6.4	4.5	-1.9	-1.5
Q4e: The return on capital for your dealership?	7.3	6.3	-1.0	+0.4
Q4f: The quality of guidance provided by your manufacturer to your dealership?	6.3	4.8	-1.5	-1.3
Q4g: The financial support available to your dealership from your manufacturer?	5.5	4.3	-1.2	-1.3

Question 5 - New car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	7.2	5.8	-1.4	-0.4
Q5b: Your new car targeting process?	6.8	5.4	-1.4	-0.6
Q5c: Your total margin on new vehicles?	8.0	7.6	-0.4	+1.6
Q5d: Your current bonus and rebate rates on new car sales?	7.2	7.1	-0.1	+1.1
Q5e: Manufacturer inducement to self register vehicles?	6.9	6.7	-0.2	+0.5
Q5f: Manufacturer's new vehicle supply?	3.8	4.8	+1.0	-0.8
Q5g: The fairness of your manufacturer's new car ordering and stocking policies?	6.0	5.2	-0.8	-0.9
Q5h: The fairness of your manufacturer's demonstrator programme?	6.5	5.4	-1.1	-1.0

Question 6 - Used car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	7.2	7.1	-0.1	-0.0
Q6b: The targets set by your manufacturer for used cars?	7.1	6.2	-0.9	-0.5
Q6c: The cost and quality of your manufacturer's used car warranties?	5.8	5.4	-0.4	-1.2
Q6d: Your total margin on used car sales?	7.7	6.4	-1.3	-0.7
Q6e: Your manufacturer's used car programme?	6.6	6.0	-0.6	-0.8
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	5.4	4.7	-0.7	-1.9

Question 7 - Aftersales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	6.1	5.8	-0.3	-0.7
Q7b: Quality of technical support?	5.9	5.3	-0.6	-1.0
Q7c: Availability of parts?	4.0	2.5	-1.5	-3.3
Q7d: Price of manufacturer parts compared with parts factors?	4.6	3.7	-0.9	-2.1
Q7e: Service profitability earnings?	5.5	5.3	-0.2	-1.2
Q7f: Manufacturer service plan rates and recovery?	4.7	5.1	+0.4	-1.2
Q7g: The fairness of your manufacturer's warranty policy for you and your cust...	6.2	5.5	-0.7	-1.1
Q7h: Your manufacturer's stocking policy for parts/accessories?	6.2	5.4	-0.8	-1.2

### Question 8 - Finance

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	7.1	6.0	-1.1	-0.5
Q8b: The reasonableness of the finance targets set by your manufacturer?	7.0	6.1	-0.9	-0.7
Q8c: The earnings potential of your manufacturer's finance programme?	6.9	6.1	-0.8	+0.1
Q8d: The support you receive from your manufacturer's finance house?	7.4	6.5	-0.9	+0.0

### Question 9 - Dealer/Manufacturer relationships

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	6.1	4.9	-1.2	-1.7
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	5.5	4.1	-1.4	-2.1
Q9c: Your manufacturer's dealer council/franchise board?	6.9	5.6	-1.3	-1.0
Q9d: Your manufacturer's response to your communications with them?	6.0	4.9	-1.1	-1.5
Q9e: Your manufacturer dealer standards are fair and reasonable?	6.6	5.0	-1.6	-1.5
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	5.9	4.8	-1.1	-1.4
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	5.9	5.1	-0.8	-1.2
Q9h: The value of manufacturer field staff to your business?	6.2	5.4	-0.8	-1.0
Q9i: The quality of your manufacturer's training?	7.5	6.3	-1.2	-0.6
Q9j: The cost of manufacturer's training?	6.6	5.4	-1.2	-0.9
Q9k: Your manufacturer's apprenticeship programme?	7.4	6.4	-1.0	-0.6
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	6.1	3.9	-2.2	-2.1

### Question 10 - Product and marketing

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q10a: Frequency of introduction of new models?	7.6	6.9	-0.7	+0.3
Q10b: Product value and pricing?	7.0	5.6	-1.4	-0.9
Q10c: Product advertising?	6.8	6.3	-0.5	-0.1

### Question 11 - Electric vehicle/Plug-in vehicles

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q11a: Battery Electric Vehicle products your manufacturer currently offers?	4.8	4.3	-0.5	-1.6
Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	6.8	5.5	-1.3	-1.1
Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	6.8	5.4	-1.4	-1.0
Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	5.6	4.8	-0.8	-0.6
Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	6.4	5.3	-1.1	+0.0
Q11f: With your manufacturer's support with on-site EV charging infrastructure?		3.5	-	-1.4

### Question 12 & 13 - Overall Rating

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	7.0	5.6	-1.4	-0.7
Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	7.6	5.4	-2.2	-1.0

## Overall Manufacturer Rating

Q12: How would you rate your manufacturer overall on a scale of 1 to 10?

Winter 2022

9.2

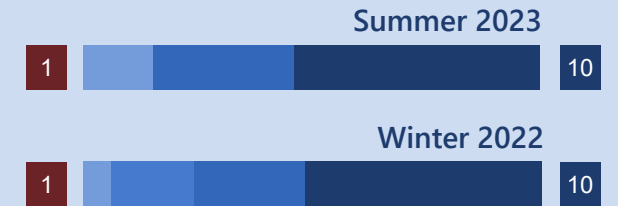
Summer 2023

9.2

Ranking vs. Winter 22  
2 vs. 2

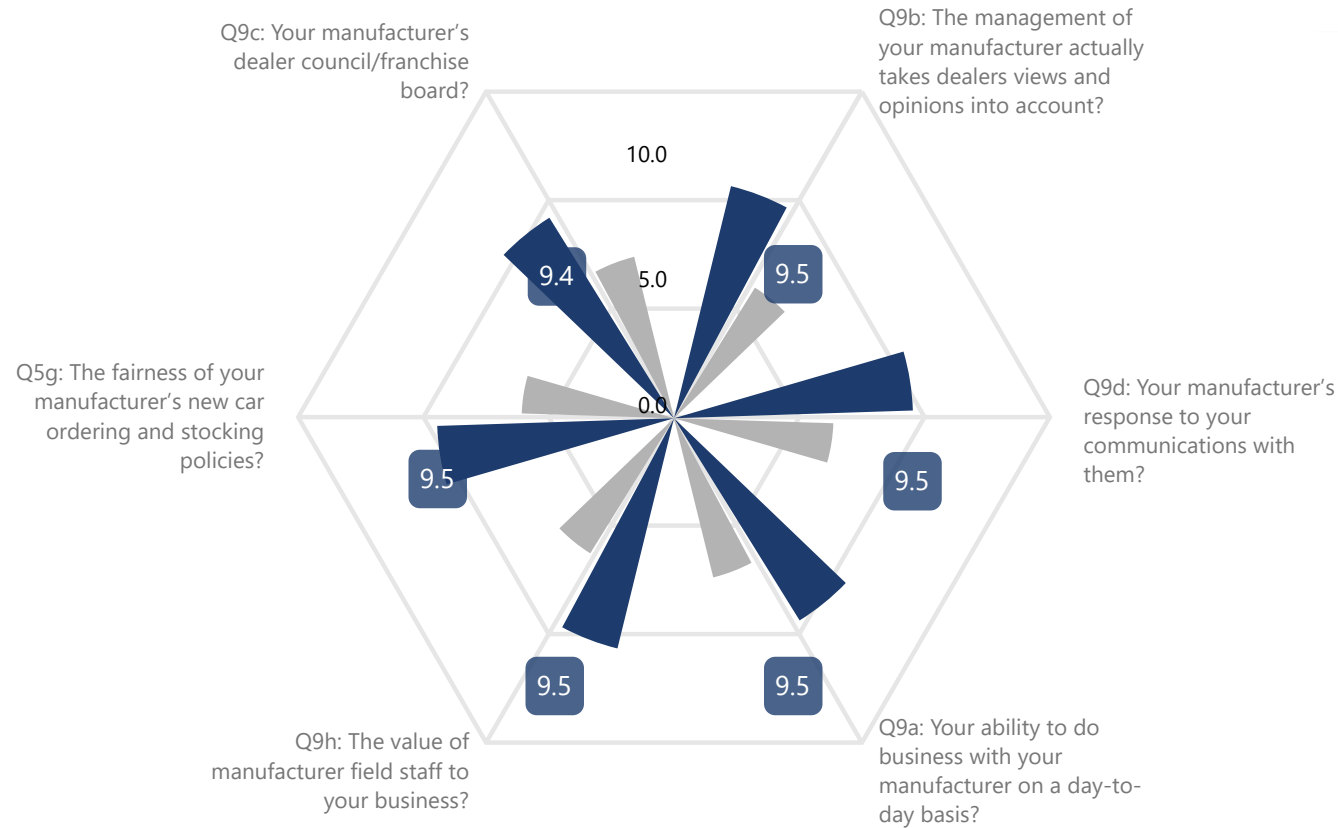
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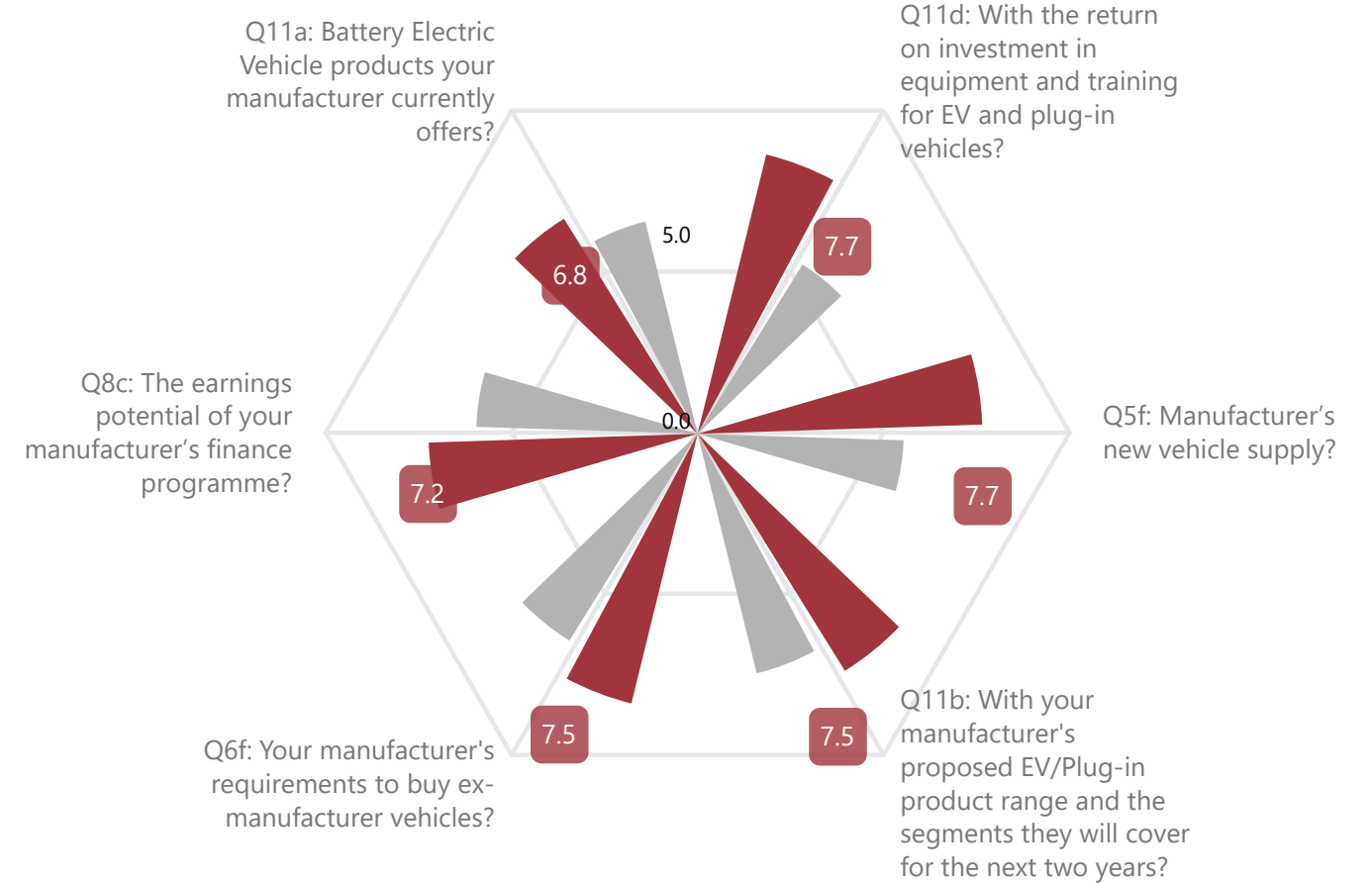
### Top 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



### Bottom 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



Question 4 - Value of the franchise	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	8.1	8.0	-0.1	+1.8
Q4b: The future profit return from representing your franchise?	8.6	8.5	-0.1	+2.8
Q4c: The required level of capital investment?	8.4	8.5	+0.1	+2.5
Q4d: The cost required in your dealership to meet franchised standards?	8.6	8.6	0.0	+2.6
Q4e: The return on capital for your dealership?	8.3	8.4	+0.1	+2.4
Q4f: The quality of guidance provided by your manufacturer to your dealership?	9.1	9.1	0.0	+3.0
Q4g: The financial support available to your dealership from your manufacturer?	8.9	9.0	+0.1	+3.4

Question 5 - New car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	8.8	8.7	-0.1	+2.6
Q5b: Your new car targeting process?	8.7	8.5	-0.2	+2.5
Q5c: Your total margin on new vehicles?	9.0	8.5	-0.5	+2.4
Q5d: Your current bonus and rebate rates on new car sales?	9.0	8.5	-0.5	+2.6
Q5e: Manufacturer inducement to self register vehicles?	8.8	8.9	+0.1	+2.7
Q5f: Manufacturer's new vehicle supply?	5.5	7.7	+2.2	+2.1
Q5g: The fairness of your manufacturer's new car ordering and stocking policies?	8.5	9.5	+1.0	+3.4
Q5h: The fairness of your manufacturer's demonstrator programme?	8.9	8.7	-0.2	+2.3

Question 6 - Used car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	9.0	9.2	+0.2	+2.1
Q6b: The targets set by your manufacturer for used cars?	9.2	9.1	-0.1	+2.4
Q6c: The cost and quality of your manufacturer's used car warranties?	9.1	8.8	-0.3	+2.2
Q6d: Your total margin on used car sales?	9.0	9.0	0.0	+2.0
Q6e: Your manufacturer's used car programme?	8.9	9.0	+0.1	+2.2
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	7.8	7.5	-0.3	+0.9

Question 7 - Aftersales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	8.5	8.9	+0.4	+2.4
Q7b: Quality of technical support?	9.4	9.0	-0.4	+2.7
Q7c: Availability of parts?	9.0	9.1	+0.1	+3.3
Q7d: Price of manufacturer parts compared with parts factors?	8.5	8.5	0.0	+2.8
Q7e: Service profitability earnings?	8.8	8.7	-0.1	+2.3
Q7f: Manufacturer service plan rates and recovery?	8.7	8.7	0.0	+2.4
Q7g: The fairness of your manufacturer's warranty policy for you and your cust...	9.3	9.1	-0.2	+2.5
Q7h: Your manufacturer's stocking policy for parts/accessories?	9.2	9.1	-0.1	+2.5

### Question 8 - Finance

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	8.7	8.5	-0.2	+2.1
Q8b: The reasonableness of the finance targets set by your manufacturer?	9.2	8.7	-0.5	+1.9
Q8c: The earnings potential of your manufacturer's finance programme?	7.5	7.2	-0.3	+1.3
Q8d: The support you receive from your manufacturer's finance house?	8.9	8.5	-0.4	+2.0

### Question 9 - Dealer/Manufacturer relationships

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	9.6	9.5	-0.1	+3.0
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	9.7	9.5	-0.2	+3.4
Q9c: Your manufacturer's dealer council/franchise board?	9.4	9.4	0.0	+2.8
Q9d: Your manufacturer's response to your communications with them?	9.5	9.5	0.0	+3.2
Q9e: Your manufacturer dealer standards are fair and reasonable?	9.4	9.4	0.0	+2.9
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	9.2	9.4	+0.2	+3.2
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	9.2	9.3	+0.1	+2.9
Q9h: The value of manufacturer field staff to your business?	8.8	9.5	+0.7	+3.1
Q9i: The quality of your manufacturer's training?	9.2	9.0	-0.2	+2.1
Q9j: The cost of manufacturer's training?	8.8	8.6	-0.2	+2.3
Q9k: Your manufacturer's apprenticeship programme?	9.4	8.8	-0.6	+1.8
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	9.2	9.2	0.0	+3.1

### Question 10 - Product and marketing

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q10a: Frequency of introduction of new models?	8.2	8.7	+0.5	+2.1
Q10b: Product value and pricing?	8.9	8.6	-0.3	+2.1
Q10c: Product advertising?	8.7	8.3	-0.4	+1.9

### Question 11 - Electric vehicle/Plug-in vehicles

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q11a: Battery Electric Vehicle products your manufacturer currently offers?	6.4	6.8	+0.4	+0.9
Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	8.7	7.5	-1.2	+0.9
Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	9.2	8.6	-0.6	+2.2
Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	8.9	7.7	-1.2	+2.4
Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	8.6	7.9	-0.7	+2.7
Q11f: With your manufacturer's support with on-site EV charging infrastructure?		8.0	-	+3.1

### Question 12 & 13 - Overall Rating

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	9.2	9.2	0.0	+2.9
Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	9.4	9.2	-0.2	+2.7

## Overall Manufacturer Rating

Q12: How would you rate your manufacturer overall on a scale of 1 to 10?

Winter 2022

7.7

Summer 2023

7.5

Ranking vs. Winter 22  
10 vs. 8

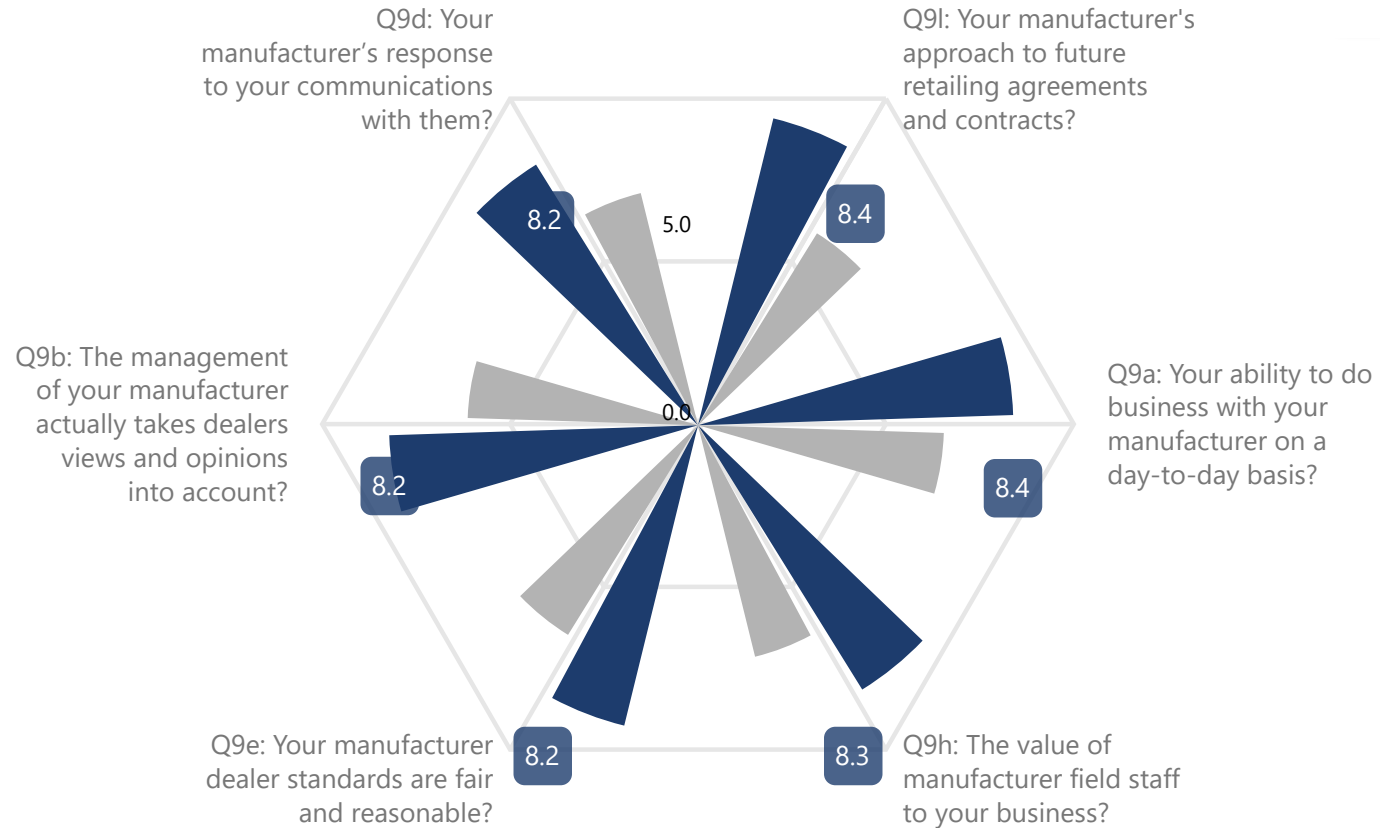
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Score Change  
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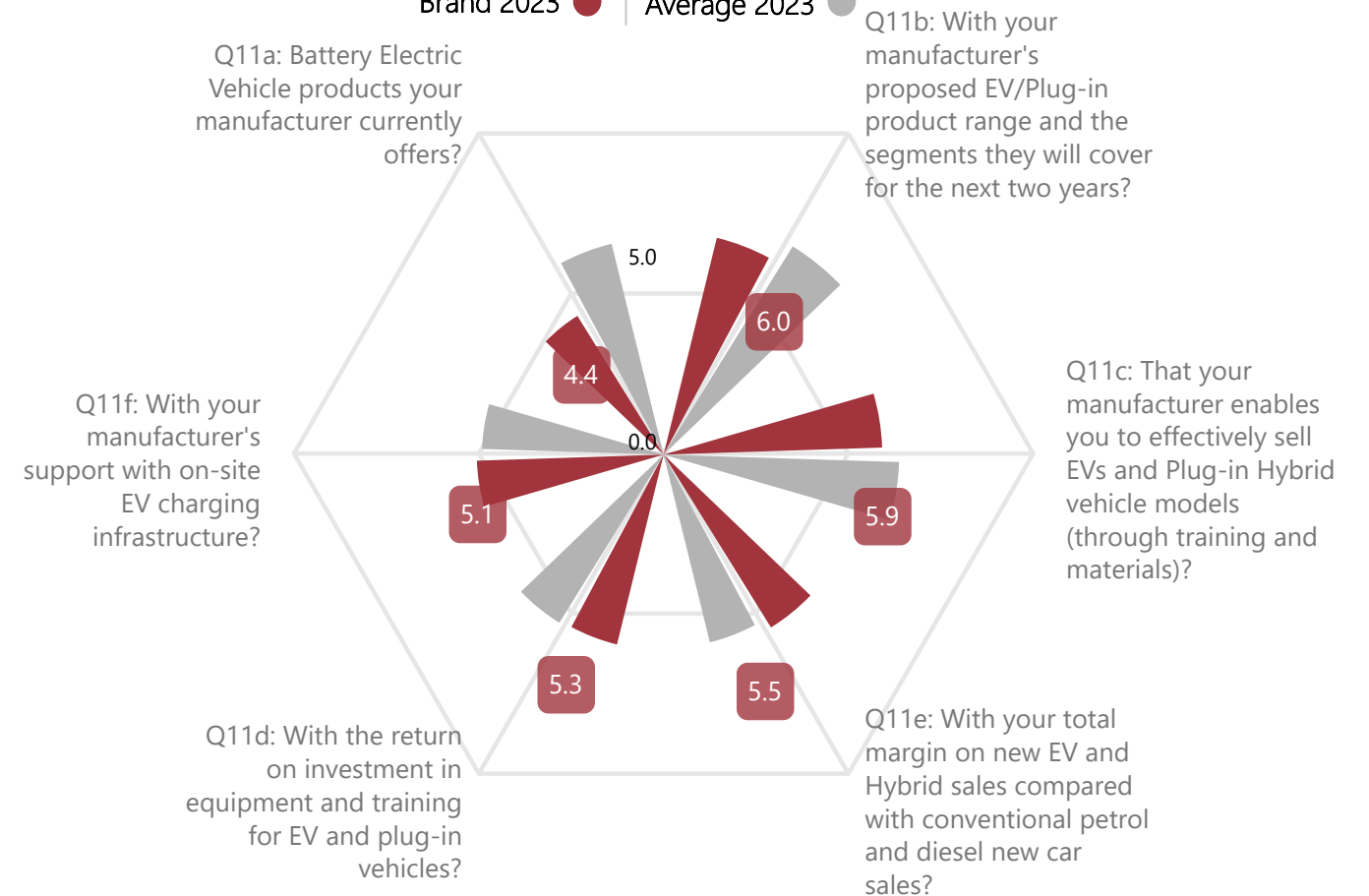
## Top 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



## Bottom 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



Question 4 - Value of the franchise	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	7.0	6.7	-0.3	+0.6
Q4b: The future profit return from representing your franchise?	7.1	6.8	-0.3	+1.0
Q4c: The required level of capital investment?	7.8	7.5	-0.3	+1.5
Q4d: The cost required in your dealership to meet franchised standards?	7.7	7.3	-0.4	+1.3
Q4e: The return on capital for your dealership?	7.0	6.7	-0.3	+0.8
Q4f: The quality of guidance provided by your manufacturer to your dealership?	7.7	7.6	-0.1	+1.6
Q4g: The financial support available to your dealership from your manufacturer?	6.6	6.4	-0.2	+0.8

Question 5 - New car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	6.4	6.7	+0.3	+0.6
Q5b: Your new car targeting process?	6.5	6.7	+0.2	+0.6
Q5c: Your total margin on new vehicles?	8.0	7.3	-0.7	+1.3
Q5d: Your current bonus and rebate rates on new car sales?	7.6	7.1	-0.5	+1.1
Q5e: Manufacturer inducement to self register vehicles?	8.0	7.3	-0.7	+1.1
Q5f: Manufacturer's new vehicle supply?	7.2	7.0	-0.2	+1.5
Q5g: The fairness of your manufacturer's new car ordering and stocking policies?	7.5	7.3	-0.2	+1.2
Q5h: The fairness of your manufacturer's demonstrator programme?	7.8	7.3	-0.5	+0.9

Question 6 - Used car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	8.1	7.9	-0.2	+0.8
Q6b: The targets set by your manufacturer for used cars?	8.8	8.1	-0.7	+1.4
Q6c: The cost and quality of your manufacturer's used car warranties?	7.9	7.9	0.0	+1.2
Q6d: Your total margin on used car sales?	8.6	8.0	-0.6	+0.9
Q6e: Your manufacturer's used car programme?	7.9	7.9	0.0	+1.1
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	8.7	7.9	-0.8	+1.4

Question 7 - Aftersales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	8.1	7.8	-0.3	+1.3
Q7b: Quality of technical support?	8.0	7.8	-0.2	+1.5
Q7c: Availability of parts?	7.2	7.8	+0.6	+2.0
Q7d: Price of manufacturer parts compared with parts factors?	6.8	6.9	+0.1	+1.1
Q7e: Service profitability earnings?	7.6	7.8	+0.2	+1.4
Q7f: Manufacturer service plan rates and recovery?	7.4	7.6	+0.2	+1.3
Q7g: The fairness of your manufacturer's warranty policy for you and your cust...	8.0	8.0	0.0	+1.4
Q7h: Your manufacturer's stocking policy for parts/accessories?	7.9	7.8	-0.1	+1.2

### Question 8 - Finance

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	7.8	7.4	-0.4	+0.9
Q8b: The reasonableness of the finance targets set by your manufacturer?	8.0	7.7	-0.3	+0.9
Q8c: The earnings potential of your manufacturer's finance programme?	7.2	6.6	-0.6	+0.7
Q8d: The support you receive from your manufacturer's finance house?	8.0	7.3	-0.7	+0.8

### Question 9 - Dealer/Manufacturer relationships

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	8.3	8.4	+0.1	+1.8
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	8.2	8.2	0.0	+2.1
Q9c: Your manufacturer's dealer council/franchise board?	7.7	7.5	-0.2	+0.9
Q9d: Your manufacturer's response to your communications with them?	8.2	8.2	0.0	+1.8
Q9e: Your manufacturer dealer standards are fair and reasonable?	8.3	8.2	-0.1	+1.7
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	7.6	7.9	+0.3	+1.7
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	7.9	8.1	+0.2	+1.8
Q9h: The value of manufacturer field staff to your business?	8.5	8.3	-0.2	+1.9
Q9i: The quality of your manufacturer's training?	7.7	7.9	+0.2	+1.0
Q9j: The cost of manufacturer's training?	7.6	7.5	-0.1	+1.2
Q9k: Your manufacturer's apprenticeship programme?	7.5	7.8	+0.3	+0.8
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	8.3	8.4	+0.1	+2.4

### Question 10 - Product and marketing

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q10a: Frequency of introduction of new models?	7.1	6.2	-0.9	-0.4
Q10b: Product value and pricing?	7.7	7.3	-0.4	+0.8
Q10c: Product advertising?	7.3	6.9	-0.4	+0.5

### Question 11 - Electric vehicle/Plug-in vehicles

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q11a: Battery Electric Vehicle products your manufacturer currently offers?	5.2	4.4	-0.8	-1.5
Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	6.2	6.0	-0.2	-0.6
Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	6.5	5.9	-0.6	-0.5
Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	5.8	5.3	-0.5	-0.1
Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	6.2	5.5	-0.7	+0.3
Q11f: With your manufacturer's support with on-site EV charging infrastructure?		5.1	-	+0.1

### Question 12 & 13 - Overall Rating

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	7.7	7.5	-0.2	+1.2
Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	7.7	7.4	-0.3	+1.0



## Overall Manufacturer Rating

Q12: How would you rate your manufacturer overall on a scale of 1 to 10?

Winter 2022

8.7

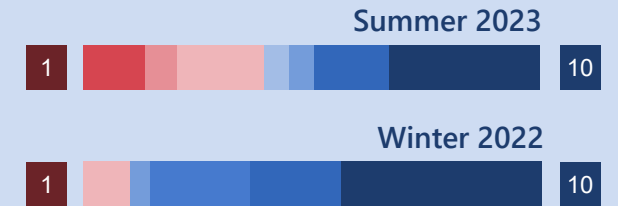
Summer 2023

7.0

Ranking vs. Winter 22  
**13 vs. 4**

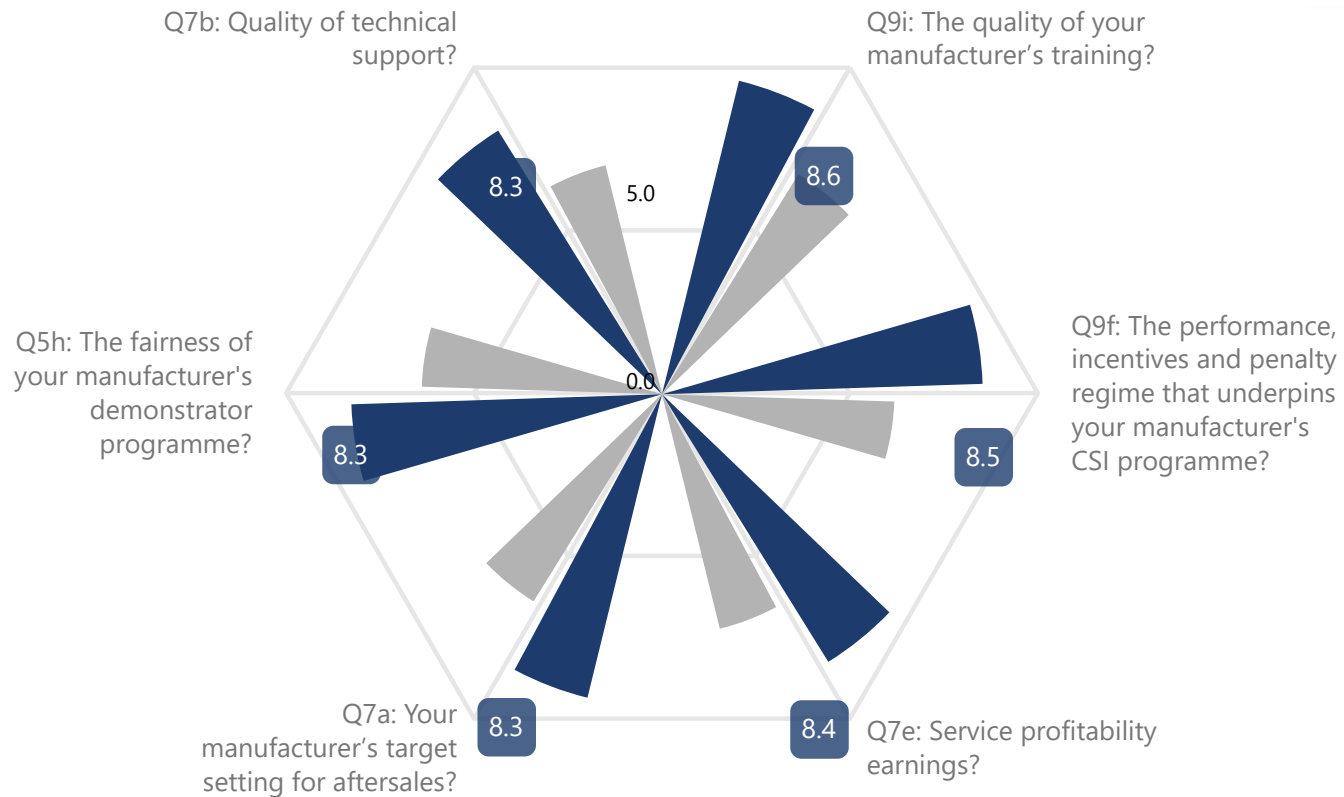
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Score Change  
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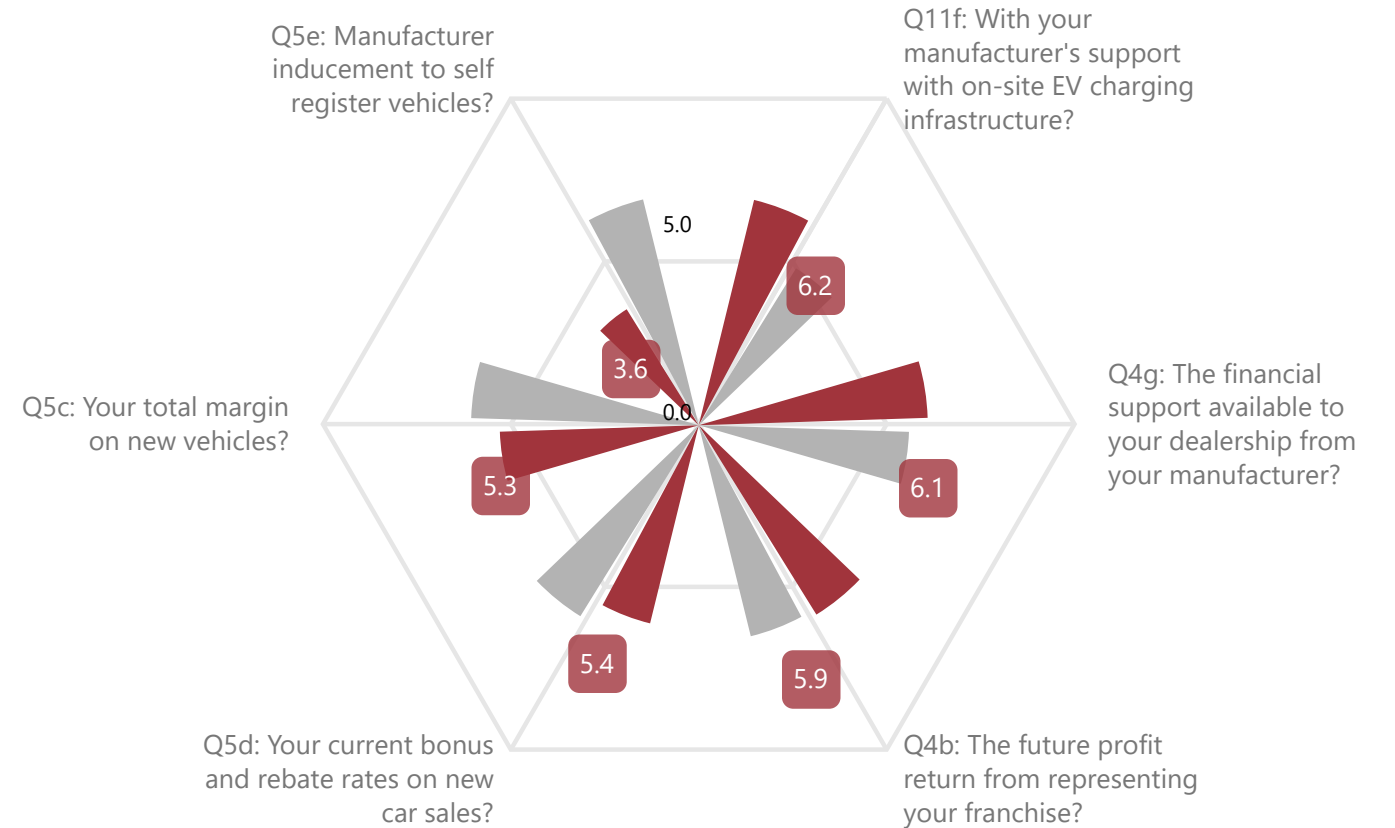
## Top 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



## Bottom 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



Question 4 - Value of the franchise	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	8.7	6.5	-2.2	+0.3
Q4b: The future profit return from representing your franchise?	6.6	5.9	-0.7	+0.1
Q4c: The required level of capital investment?	8.1	6.7	-1.4	+0.6
Q4d: The cost required in your dealership to meet franchised standards?	7.8	6.7	-1.1	+0.7
Q4e: The return on capital for your dealership?	8.3	6.2	-2.1	+0.3
Q4f: The quality of guidance provided by your manufacturer to your dealership?	8.8	7.4	-1.4	+1.3
Q4g: The financial support available to your dealership from your manufacturer?	7.7	6.1	-1.6	+0.5

Question 5 - New car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	8.0	6.3	-1.7	+0.2
Q5b: Your new car targeting process?	7.9	7.2	-0.7	+1.2
Q5c: Your total margin on new vehicles?	4.9	5.3	+0.4	-0.8
Q5d: Your current bonus and rebate rates on new car sales?	4.6	5.4	+0.8	-0.5
Q5e: Manufacturer inducement to self register vehicles?	10.0	3.6	-6.4	-2.6
Q5f: Manufacturer's new vehicle supply?	6.1	7.4	+1.3	+1.9
Q5g: The fairness of your manufacturer's new car ordering and stocking policies?	8.1	7.2	-0.9	+1.1
Q5h: The fairness of your manufacturer's demonstrator programme?	9.7	8.3	-1.4	+1.9

Question 6 - Used car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	9.2	8.2	-1.0	+1.1
Q6b: The targets set by your manufacturer for used cars?	9.1	8.0	-1.1	+1.3
Q6c: The cost and quality of your manufacturer's used car warranties?	9.2	7.8	-1.4	+1.2
Q6d: Your total margin on used car sales?	9.1	7.6	-1.5	+0.6
Q6e: Your manufacturer's used car programme?	8.8	7.8	-1.0	+1.0
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	8.9	7.0	-1.9	+0.4

Question 7 - Aftersales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	8.6	8.3	-0.3	+1.8
Q7b: Quality of technical support?	8.6	8.3	-0.3	+2.0
Q7c: Availability of parts?	6.7	6.9	+0.2	+1.2
Q7d: Price of manufacturer parts compared with parts factors?	8.0	7.8	-0.2	+2.1
Q7e: Service profitability earnings?	9.0	8.4	-0.6	+2.0
Q7f: Manufacturer service plan rates and recovery?	8.5	7.8	-0.7	+1.5
Q7g: The fairness of your manufacturer's warranty policy for you and your cust...	9.1	8.1	-1.0	+1.6
Q7h: Your manufacturer's stocking policy for parts/accessories?	9.1	8.1	-1.0	+1.5

### Question 8 - Finance

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	8.9	7.3	-1.6	+0.8
Q8b: The reasonableness of the finance targets set by your manufacturer?	9.2	7.6	-1.6	+0.8
Q8c: The earnings potential of your manufacturer's finance programme?	8.8	7.5	-1.3	+1.6
Q8d: The support you receive from your manufacturer's finance house?	8.6	7.4	-1.2	+0.9

### Question 9 - Dealer/Manufacturer relationships

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	8.8	7.8	-1.0	+1.2
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	8.5	7.7	-0.8	+1.6
Q9c: Your manufacturer's dealer council/franchise board?	8.1	8.1	0.0	+1.5
Q9d: Your manufacturer's response to your communications with them?	8.3	8.2	-0.1	+1.8
Q9e: Your manufacturer dealer standards are fair and reasonable?	8.9	8.1	-0.8	+1.5
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	8.9	8.5	-0.4	+2.4
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	9.0	8.1	-0.9	+1.7
Q9h: The value of manufacturer field staff to your business?	8.7	7.8	-0.9	+1.4
Q9i: The quality of your manufacturer's training?	9.2	8.6	-0.6	+1.7
Q9j: The cost of manufacturer's training?	9.4	8.1	-1.3	+1.8
Q9k: Your manufacturer's apprenticeship programme?	9.1	8.1	-1.0	+1.1
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	8.6	7.3	-1.3	+1.3

### Question 10 - Product and marketing

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q10a: Frequency of introduction of new models?	8.9	8.0	-0.9	+1.3
Q10b: Product value and pricing?	8.0	6.4	-1.6	-0.1
Q10c: Product advertising?	8.5	6.6	-1.9	+0.2

### Question 11 - Electric vehicle/Plug-in vehicles

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q11a: Battery Electric Vehicle products your manufacturer currently offers?	8.9	7.7	-1.2	+1.8
Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	8.9	8.1	-0.8	+1.5
Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	8.9	7.7	-1.2	+1.4
Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	8.6	6.8	-1.8	+1.5
Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	7.9	7.0	-0.9	+1.7
Q11f: With your manufacturer's support with on-site EV charging infrastructure?		6.2	-	+1.3

### Question 12 & 13 - Overall Rating

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	8.7	7.0	-1.7	+0.7
Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	8.7	6.6	-2.1	+0.2

**Overall Manufacturer Rating**

Q12: How would you rate your manufacturer overall on a scale of 1 to 10?

Winter 2022

8.2

Summer 2023

7.9

Ranking vs. Winter 22  
8 vs. 6

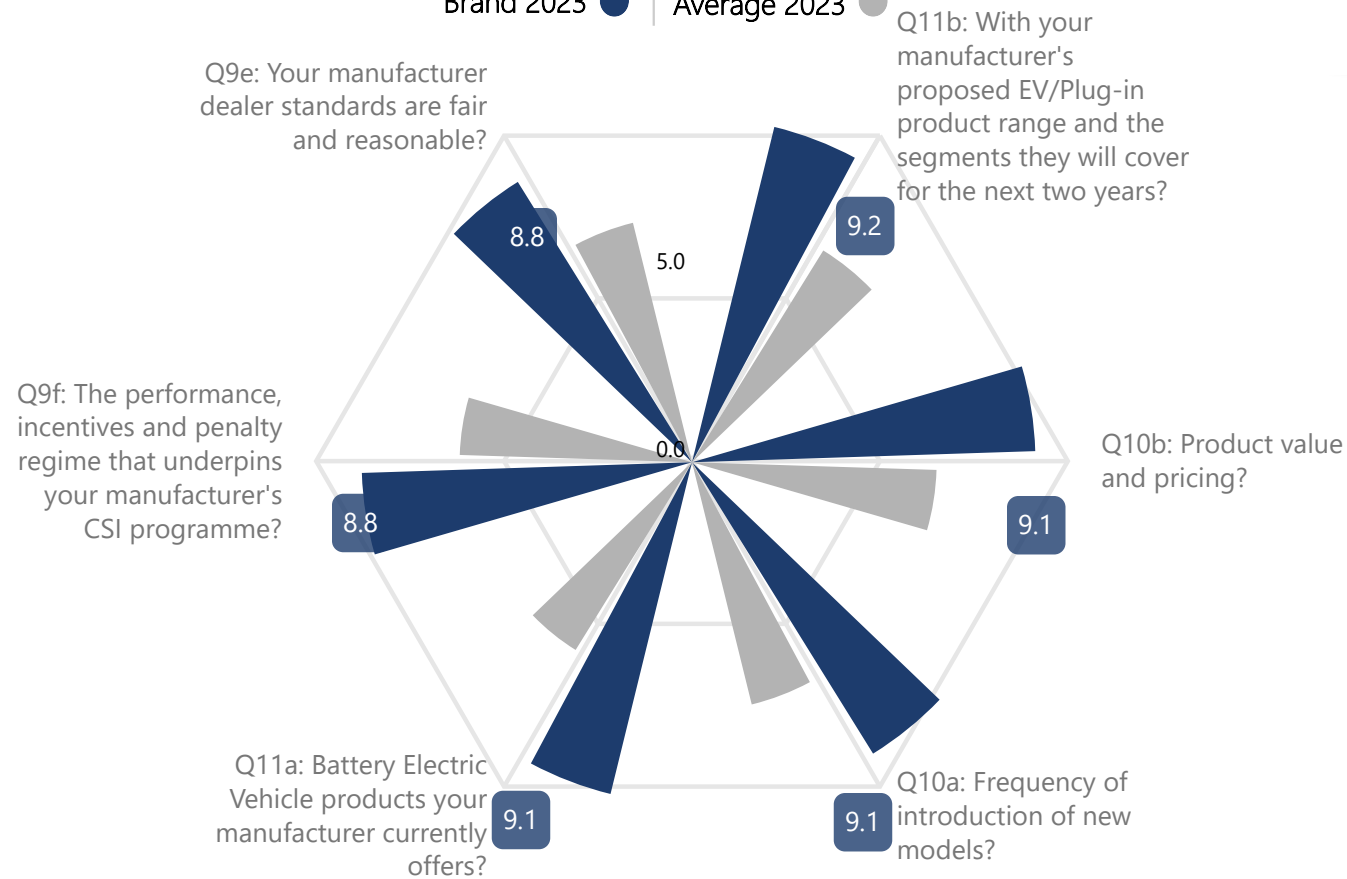
% Change  
-3.7%

Score Change  
-0.3 pts



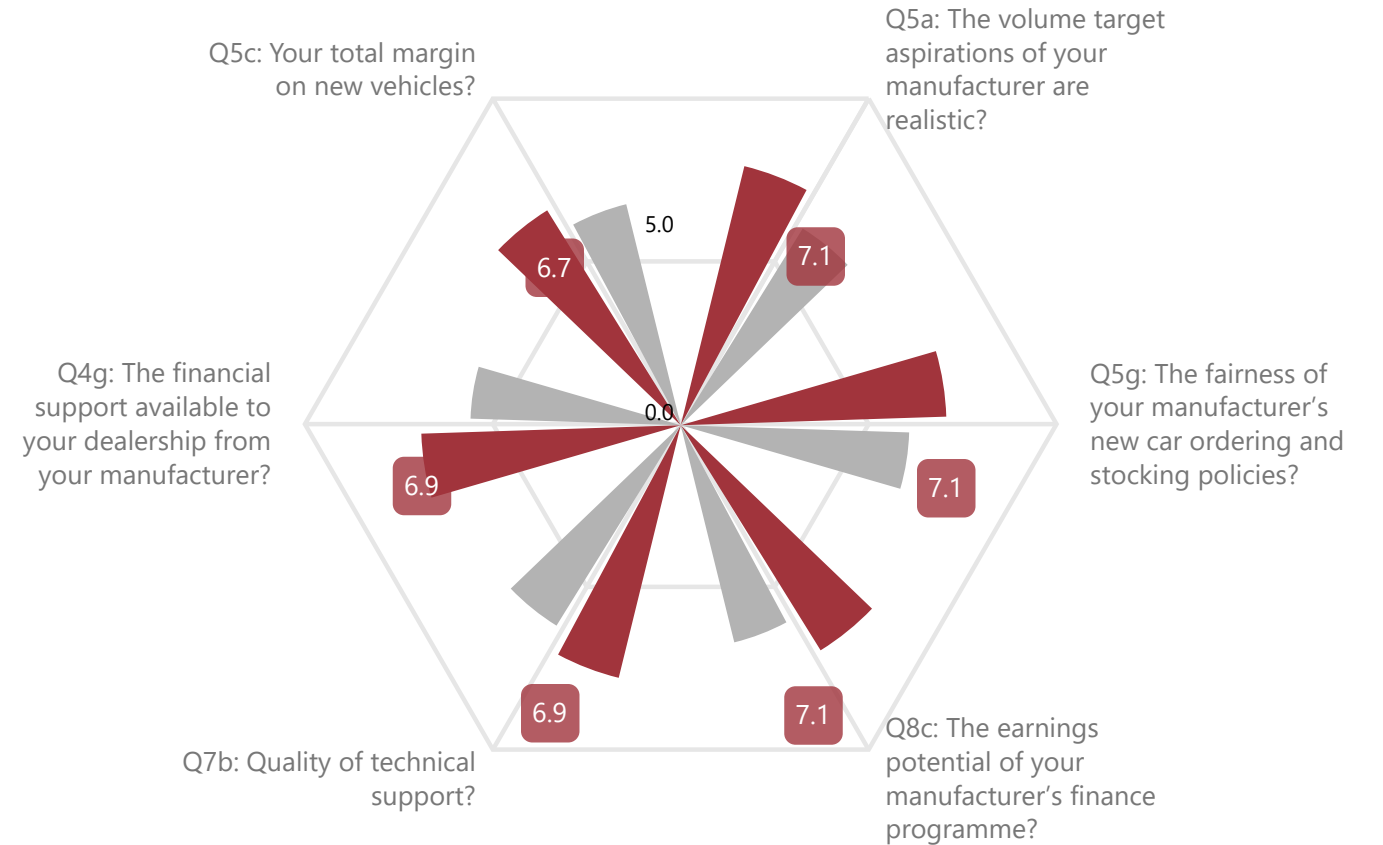
**Top 6 Questions vs Average**

Brand 2023 ● | Average 2023 ●



**Bottom 6 Questions vs Average**

Brand 2023 ● | Average 2023 ●



Question 4 - Value of the franchise	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	7.4	7.2	-0.2	+1.0
Q4b: The future profit return from representing your franchise?	7.7	7.6	-0.1	+1.8
Q4c: The required level of capital investment?	8.1	8.5	+0.4	+2.5
Q4d: The cost required in your dealership to meet franchised standards?	8.3	8.6	+0.3	+2.6
Q4e: The return on capital for your dealership?	7.7	7.2	-0.5	+1.3
Q4f: The quality of guidance provided by your manufacturer to your dealership?	7.4	7.2	-0.2	+1.2
Q4g: The financial support available to your dealership from your manufacturer?	6.8	6.9	+0.1	+1.3

Question 5 - New car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	7.7	7.1	-0.6	+0.9
Q5b: Your new car targeting process?	7.5	7.1	-0.4	+1.1
Q5c: Your total margin on new vehicles?	7.1	6.7	-0.4	+0.7
Q5d: Your current bonus and rebate rates on new car sales?	7.3	7.5	+0.2	+1.5
Q5e: Manufacturer inducement to self register vehicles?	7.9	7.7	-0.2	+1.5
Q5f: Manufacturer's new vehicle supply?	7.5	7.4	-0.1	+1.9
Q5g: The fairness of your manufacturer's new car ordering and stocking policies?	7.5	7.1	-0.4	+1.0
Q5h: The fairness of your manufacturer's demonstrator programme?	7.9	7.9	0.0	+1.5

Question 6 - Used car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	8.0	8.4	+0.4	+1.3
Q6b: The targets set by your manufacturer for used cars?	8.0	8.6	+0.6	+1.9
Q6c: The cost and quality of your manufacturer's used car warranties?	8.6	8.6	0.0	+2.0
Q6d: Your total margin on used car sales?	7.9	7.8	-0.1	+0.8
Q6e: Your manufacturer's used car programme?	7.7	7.8	+0.1	+1.0
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	7.8	8.1	+0.3	+1.5

Question 7 - Aftersales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	8.1	8.6	+0.5	+2.1
Q7b: Quality of technical support?	6.8	6.9	+0.1	+0.6
Q7c: Availability of parts?	7.1	7.5	+0.4	+1.7
Q7d: Price of manufacturer parts compared with parts factors?	7.4	7.7	+0.3	+1.9
Q7e: Service profitability earnings?	7.2	7.1	-0.1	+0.7
Q7f: Manufacturer service plan rates and recovery?	7.3	7.5	+0.2	+1.1
Q7g: The fairness of your manufacturer's warranty policy for you and your cust...	7.7	7.1	-0.6	+0.5
Q7h: Your manufacturer's stocking policy for parts/accessories?	7.9	8.2	+0.3	+1.5

**Question 8 - Finance**

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	7.7	7.9	+0.2	+1.4
Q8b: The reasonableness of the finance targets set by your manufacturer?	8.1	8.4	+0.3	+1.6
Q8c: The earnings potential of your manufacturer's finance programme?	6.9	7.1	+0.2	+1.1
Q8d: The support you receive from your manufacturer's finance house?	7.9	8.2	+0.3	+1.7

**Question 9 - Dealer/Manufacturer relationships**

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	7.8	8.0	+0.2	+1.5
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	7.4	7.8	+0.4	+1.6
Q9c: Your manufacturer's dealer council/franchise board?	7.1	7.9	+0.8	+1.3
Q9d: Your manufacturer's response to your communications with them?	7.5	7.8	+0.3	+1.5
Q9e: Your manufacturer dealer standards are fair and reasonable?	8.5	8.8	+0.3	+2.2
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	8.4	8.8	+0.4	+2.6
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	8.2	8.3	+0.1	+2.0
Q9h: The value of manufacturer field staff to your business?	7.6	8.1	+0.5	+1.7
Q9i: The quality of your manufacturer's training?	7.5	7.5	0.0	+0.6
Q9j: The cost of manufacturer's training?	8.0	8.5	+0.5	+2.2
Q9k: Your manufacturer's apprenticeship programme?	8.1	8.6	+0.5	+1.6
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	8.1	8.3	+0.2	+2.3

**Question 10 - Product and marketing**

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q10a: Frequency of introduction of new models?	8.9	9.1	+0.2	+2.5
Q10b: Product value and pricing?	8.9	9.1	+0.2	+2.6
Q10c: Product advertising?	8.6	8.0	-0.6	+1.6

**Question 11 - Electric vehicle/Plug-in vehicles**

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q11a: Battery Electric Vehicle products your manufacturer currently offers?	8.9	9.1	+0.2	+3.2
Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	8.9	9.2	+0.3	+2.6
Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	8.5	8.6	+0.1	+2.3
Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	8.5	8.3	-0.2	+2.9
Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	8.2	8.2	0.0	+3.0
Q11f: With your manufacturer's support with on-site EV charging infrastructure?		7.6	-	+2.6

**Question 12 & 13 - Overall Rating**

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	8.2	7.9	-0.3	+1.6
Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	8.3	7.8	-0.5	+1.4

## Overall Manufacturer Rating

Q12: How would you rate your manufacturer overall on a scale of 1 to 10?

Winter 2022

8.8

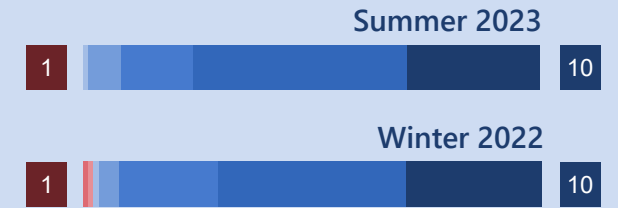
Summer 2023

9.0

Ranking vs. Winter 22  
**3 vs. 3**

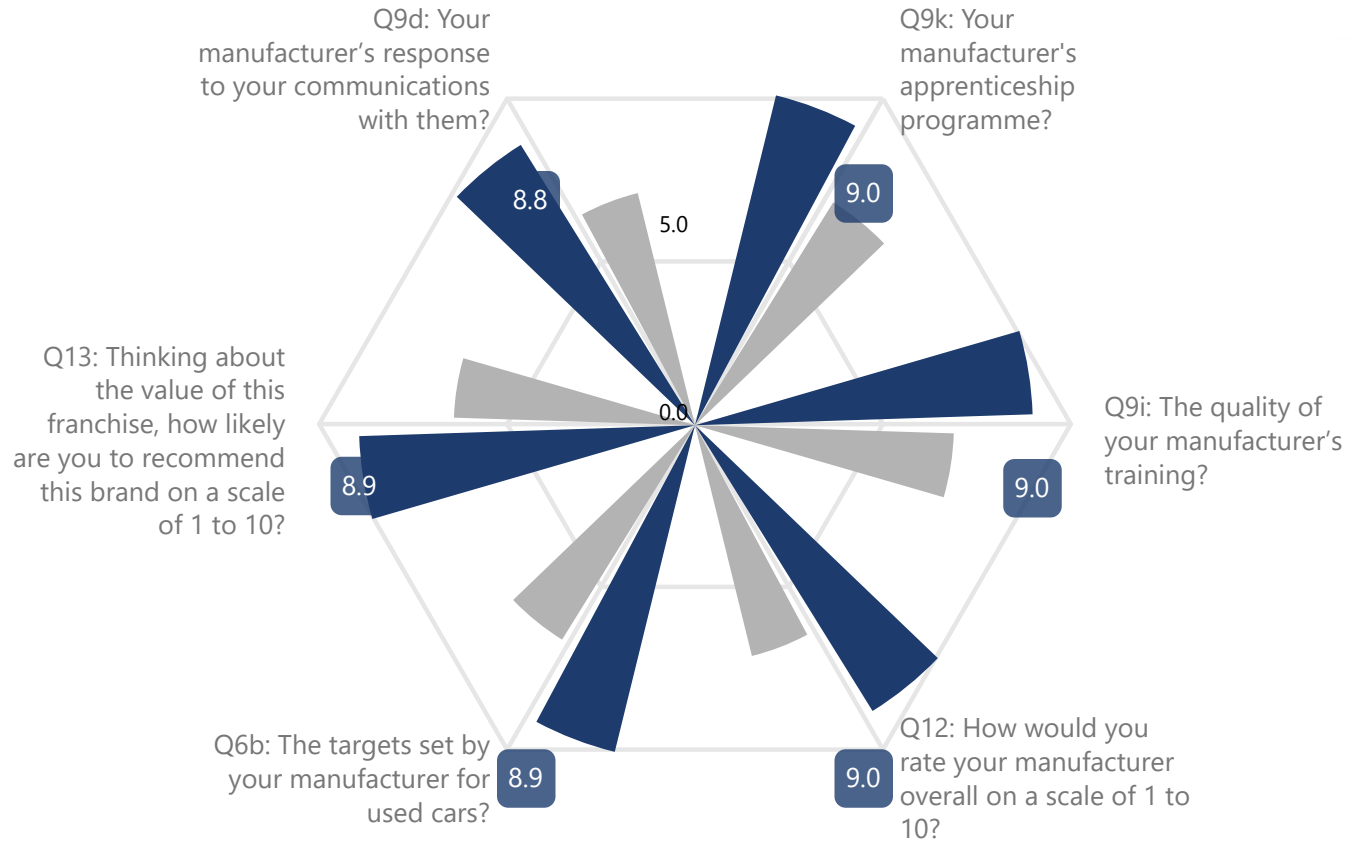
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**+2.3%**

Score Change  
**+0.2 pts**



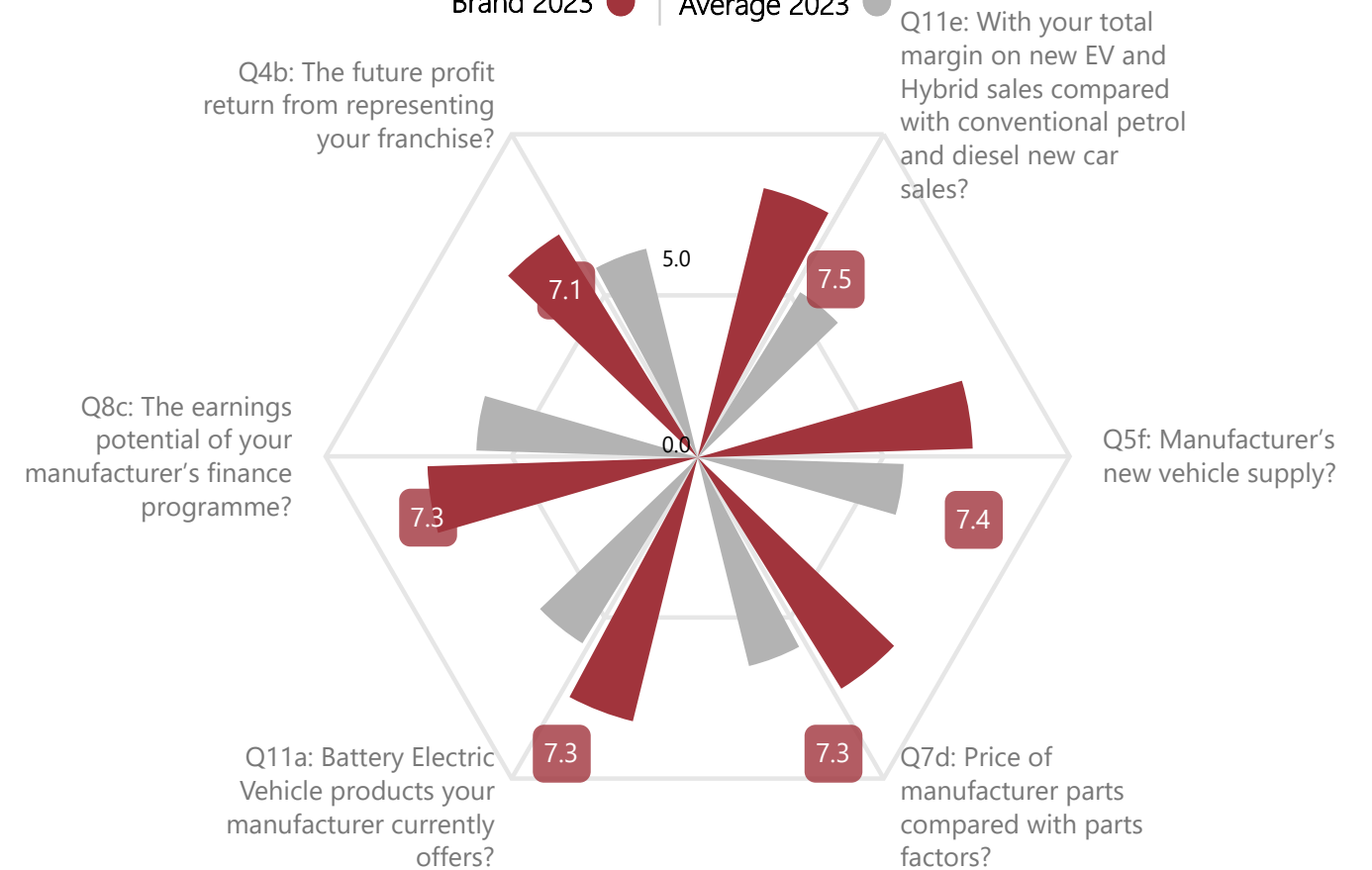
### Top 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



### Bottom 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



Question 4 - Value of the franchise	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	8.5	8.2	-0.3	+2.0
Q4b: The future profit return from representing your franchise?	7.4	7.1	-0.3	+1.3
Q4c: The required level of capital investment?	8.2	7.8	-0.4	+1.7
Q4d: The cost required in your dealership to meet franchised standards?	8.1	7.8	-0.3	+1.8
Q4e: The return on capital for your dealership?	8.0	7.9	-0.1	+1.9
Q4f: The quality of guidance provided by your manufacturer to your dealership?	8.7	8.5	-0.2	+2.4
Q4g: The financial support available to your dealership from your manufacturer?	8.5	8.0	-0.5	+2.4

Question 5 - New car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	8.7	8.5	-0.2	+2.4
Q5b: Your new car targeting process?	8.6	8.5	-0.1	+2.4
Q5c: Your total margin on new vehicles?	8.6	8.1	-0.5	+2.1
Q5d: Your current bonus and rebate rates on new car sales?	8.5	8.3	-0.2	+2.3
Q5e: Manufacturer inducement to self register vehicles?	8.4	8.6	+0.2	+2.4
Q5f: Manufacturer's new vehicle supply?	7.5	7.4	-0.1	+1.9
Q5g: The fairness of your manufacturer's new car ordering and stocking policies?	8.4	8.4	0.0	+2.4
Q5h: The fairness of your manufacturer's demonstrator programme?	8.9	8.5	-0.4	+2.1

Question 6 - Used car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	8.6	8.5	-0.1	+1.4
Q6b: The targets set by your manufacturer for used cars?	8.8	8.9	+0.1	+2.2
Q6c: The cost and quality of your manufacturer's used car warranties?	8.5	8.6	+0.1	+1.9
Q6d: Your total margin on used car sales?	8.2	8.1	-0.1	+1.1
Q6e: Your manufacturer's used car programme?	8.5	8.4	-0.1	+1.6
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	8.5	8.7	+0.2	+2.2

Question 7 - Aftersales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	7.7	7.9	+0.2	+1.4
Q7b: Quality of technical support?	8.5	8.6	+0.1	+2.3
Q7c: Availability of parts?	8.2	8.1	-0.1	+2.3
Q7d: Price of manufacturer parts compared with parts factors?	7.1	7.3	+0.2	+1.5
Q7e: Service profitability earnings?	8.2	7.9	-0.3	+1.5
Q7f: Manufacturer service plan rates and recovery?	7.9	8.0	+0.1	+1.6
Q7g: The fairness of your manufacturer's warranty policy for you and your cust...	8.8	8.6	-0.2	+2.0
Q7h: Your manufacturer's stocking policy for parts/accessories?	8.2	8.2	0.0	+1.6



### Question 8 - Finance

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	7.3	7.5	+0.2	+1.1
Q8b: The reasonableness of the finance targets set by your manufacturer?	8.1	8.1	0.0	+1.4
Q8c: The earnings potential of your manufacturer's finance programme?	7.5	7.3	-0.2	+1.3
Q8d: The support you receive from your manufacturer's finance house?	7.8	7.6	-0.2	+1.1

### Question 9 - Dealer/Manufacturer relationships

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	8.9	8.7	-0.2	+2.2
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	8.7	8.7	0.0	+2.5
Q9c: Your manufacturer's dealer council/franchise board?	8.2	8.4	+0.2	+1.8
Q9d: Your manufacturer's response to your communications with them?	8.6	8.8	+0.2	+2.4
Q9e: Your manufacturer dealer standards are fair and reasonable?	8.8	8.7	-0.1	+2.2
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	8.5	8.4	-0.1	+2.2
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	8.6	8.6	0.0	+2.3
Q9h: The value of manufacturer field staff to your business?	8.5	8.5	0.0	+2.2
Q9i: The quality of your manufacturer's training?	9.1	9.0	-0.1	+2.1
Q9j: The cost of manufacturer's training?	8.1	8.2	+0.1	+1.9
Q9k: Your manufacturer's apprenticeship programme?	9.1	9.0	-0.1	+2.1
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	8.0	8.2	+0.2	+2.2

### Question 10 - Product and marketing

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q10a: Frequency of introduction of new models?	8.0	8.4	+0.4	+1.8
Q10b: Product value and pricing?	8.1	8.3	+0.2	+1.8
Q10c: Product advertising?	8.5	8.5	0.0	+2.1

### Question 11 - Electric vehicle/Plug-in vehicles

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q11a: Battery Electric Vehicle products your manufacturer currently offers?	7.4	7.3	-0.1	+1.4
Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	8.5	8.7	+0.2	+2.0
Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	8.4	8.3	-0.1	+2.0
Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	7.9	7.6	-0.3	+2.2
Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	7.9	7.5	-0.4	+2.2
Q11f: With your manufacturer's support with on-site EV charging infrastructure?		7.8	-	+2.8

### Question 12 & 13 - Overall Rating

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	8.8	9.0	+0.2	+2.6
Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	8.9	8.9	0.0	+2.5

## Overall Manufacturer Rating

Q12: How would you rate your manufacturer overall on a scale of 1 to 10?

Winter 2022

7.6

Summer 2023

8.0

Ranking vs. Winter 22  
7 vs. 10

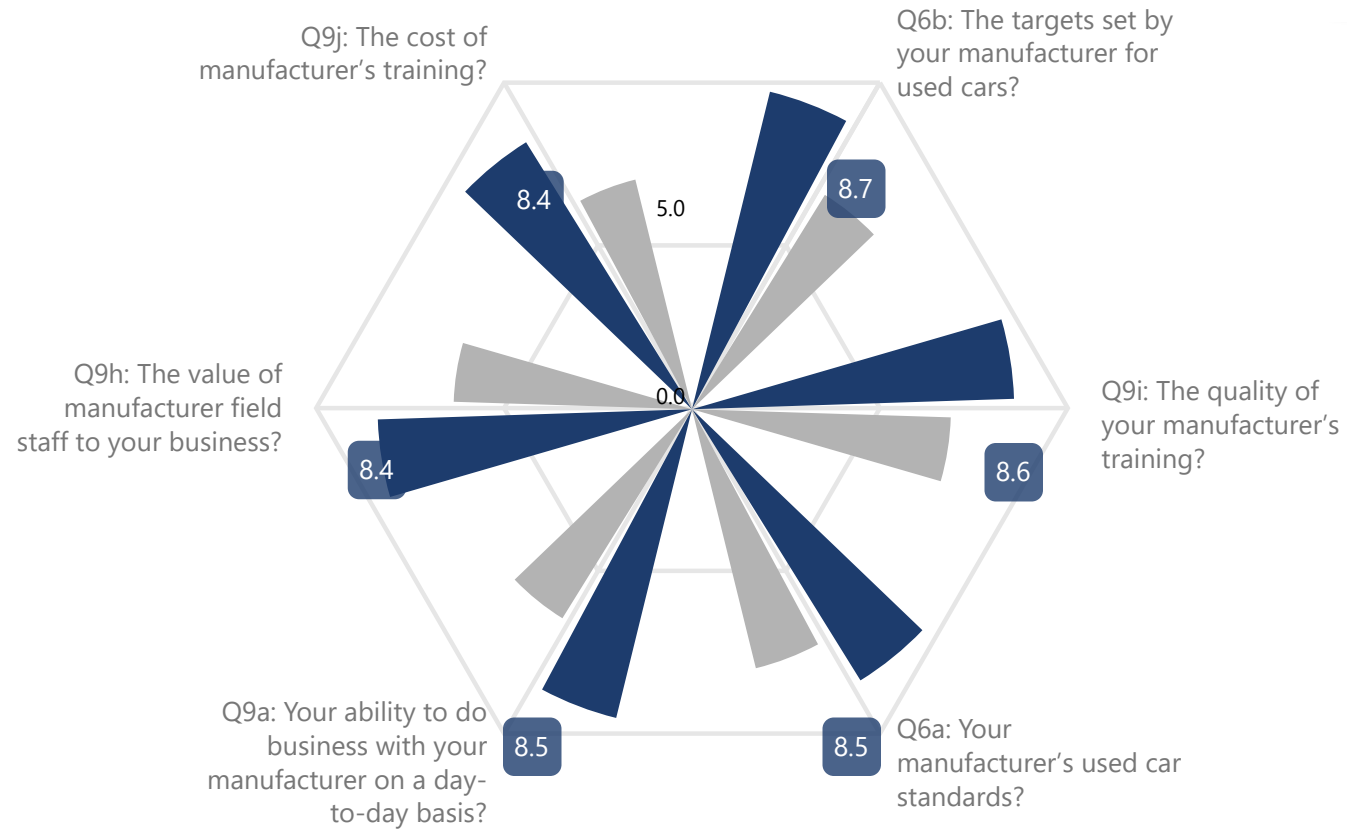
% Change  
**+5.3%**

Score Change  
**+0.4 pts**



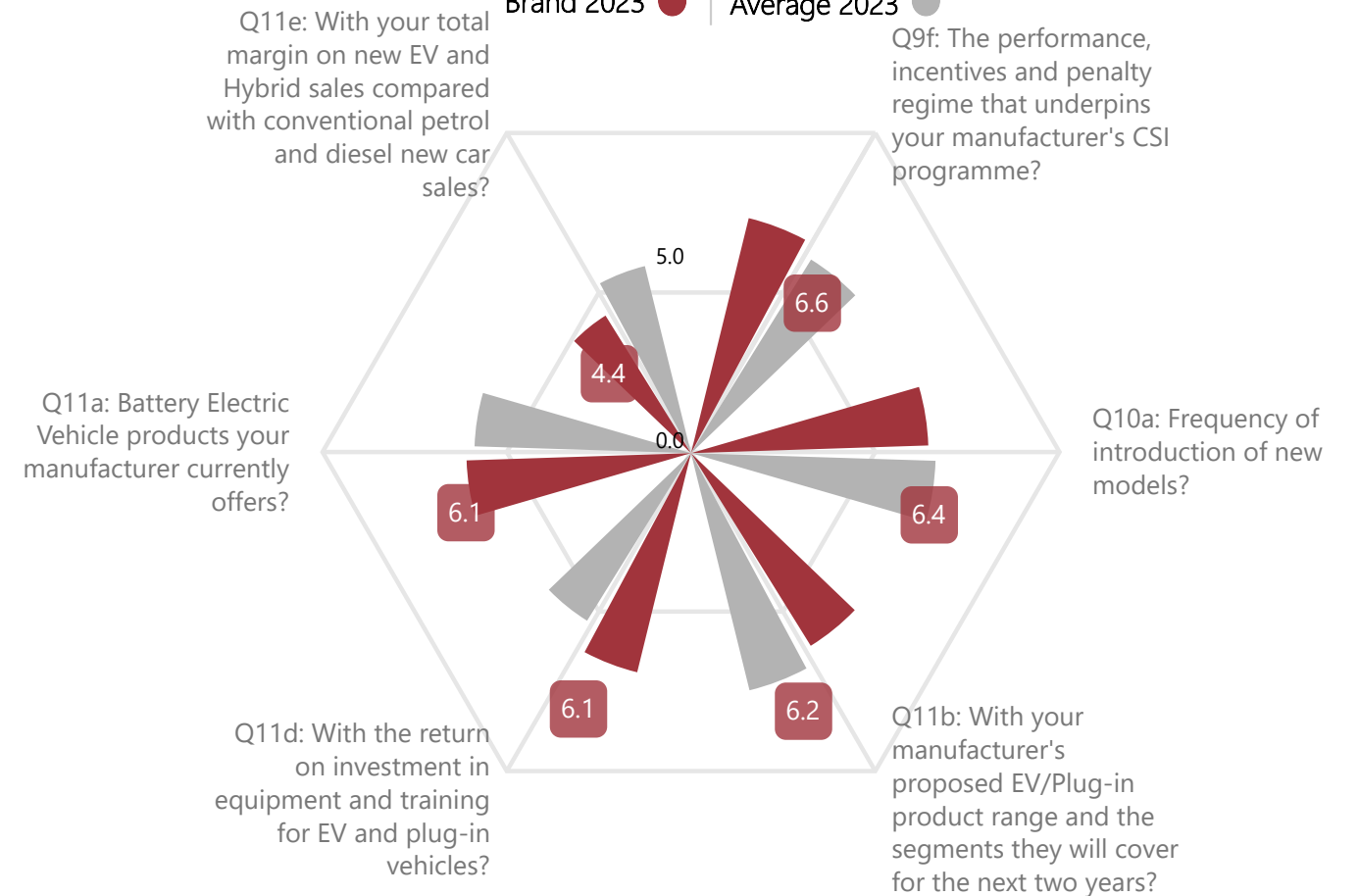
## Top 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



## Bottom 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



Question 4 - Value of the franchise	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	7.2	7.0	-0.2	+0.8
Q4b: The future profit return from representing your franchise?	7.2	7.2	0.0	+1.4
Q4c: The required level of capital investment?	7.0	7.3	+0.3	+1.2
Q4d: The cost required in your dealership to meet franchised standards?	6.8	7.3	+0.5	+1.3
Q4e: The return on capital for your dealership?	7.1	7.3	+0.2	+1.3
Q4f: The quality of guidance provided by your manufacturer to your dealership?	7.5	8.2	+0.7	+2.2
Q4g: The financial support available to your dealership from your manufacturer?	6.7	6.9	+0.2	+1.3

Question 5 - New car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	7.4	7.4	0.0	+1.2
Q5b: Your new car targeting process?	7.0	7.4	+0.4	+1.4
Q5c: Your total margin on new vehicles?	7.4	7.4	0.0	+1.3
Q5d: Your current bonus and rebate rates on new car sales?	7.4	7.3	-0.1	+1.3
Q5e: Manufacturer inducement to self register vehicles?	7.1	8.1	+1.0	+1.9
Q5f: Manufacturer's new vehicle supply?	7.4	7.6	+0.2	+2.0
Q5g: The fairness of your manufacturer's new car ordering and stocking policies?	7.7	8.3	+0.6	+2.2
Q5h: The fairness of your manufacturer's demonstrator programme?	7.4	7.8	+0.4	+1.4

Question 6 - Used car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	7.5	8.5	+1.0	+1.4
Q6b: The targets set by your manufacturer for used cars?	7.7	8.7	+1.0	+2.0
Q6c: The cost and quality of your manufacturer's used car warranties?	7.4	8.2	+0.8	+1.6
Q6d: Your total margin on used car sales?	7.8	7.4	-0.4	+0.4
Q6e: Your manufacturer's used car programme?	7.9	8.3	+0.4	+1.5
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	8.0	8.2	+0.2	+1.6

Question 7 - Aftersales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	7.0	7.5	+0.5	+1.1
Q7b: Quality of technical support?	7.1	8.1	+1.0	+1.8
Q7c: Availability of parts?	7.2	7.4	+0.2	+1.7
Q7d: Price of manufacturer parts compared with parts factors?	7.2	7.3	+0.1	+1.5
Q7e: Service profitability earnings?	7.0	7.8	+0.8	+1.4
Q7f: Manufacturer service plan rates and recovery?	7.0	8.1	+1.1	+1.7
Q7g: The fairness of your manufacturer's warranty policy for you and your cust...	7.5	8.1	+0.6	+1.5
Q7h: Your manufacturer's stocking policy for parts/accessories?	7.3	7.8	+0.5	+1.2

### Question 8 - Finance

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	8.3	8.0	-0.3	+1.6
Q8b: The reasonableness of the finance targets set by your manufacturer?	8.3	8.2	-0.1	+1.4
Q8c: The earnings potential of your manufacturer's finance programme?	8.1	7.9	-0.2	+2.0
Q8d: The support you receive from your manufacturer's finance house?	8.3	8.3	0.0	+1.8

### Question 9 - Dealer/Manufacturer relationships

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	8.0	8.5	+0.5	+1.9
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	6.9	8.1	+1.2	+2.0
Q9c: Your manufacturer's dealer council/franchise board?	7.4	8.4	+1.0	+1.7
Q9d: Your manufacturer's response to your communications with them?	7.5	8.2	+0.7	+1.8
Q9e: Your manufacturer dealer standards are fair and reasonable?	7.1	7.9	+0.8	+1.3
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	5.6	6.6	+1.0	+0.4
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	6.8	7.5	+0.7	+1.1
Q9h: The value of manufacturer field staff to your business?	8.2	8.4	+0.2	+2.0
Q9i: The quality of your manufacturer's training?	7.5	8.6	+1.1	+1.7
Q9j: The cost of manufacturer's training?	7.2	8.4	+1.2	+2.1
Q9k: Your manufacturer's apprenticeship programme?	7.3	8.2	+0.9	+1.2
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	7.8	8.1	+0.3	+2.1

### Question 10 - Product and marketing

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q10a: Frequency of introduction of new models?	7.1	6.4	-0.7	-0.2
Q10b: Product value and pricing?	7.8	7.8	0.0	+1.3
Q10c: Product advertising?	7.9	7.4	-0.5	+1.0

### Question 11 - Electric vehicle/Plug-in vehicles

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q11a: Battery Electric Vehicle products your manufacturer currently offers?	7.0	6.1	-0.9	+0.2
Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	7.2	6.2	-1.0	-0.5
Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	7.9	6.9	-1.0	+0.5
Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	7.2	6.1	-1.1	+0.8
Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	6.0	4.4	-1.6	-0.8
Q11f: With your manufacturer's support with on-site EV charging infrastructure?		6.7	-	+1.8

### Question 12 & 13 - Overall Rating

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	7.6	8.0	+0.4	+1.7
Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	7.6	7.9	+0.3	+1.5

## Overall Manufacturer Rating

Q12: How would you rate your manufacturer overall on a scale of 1 to 10?

Winter 2022

3.9

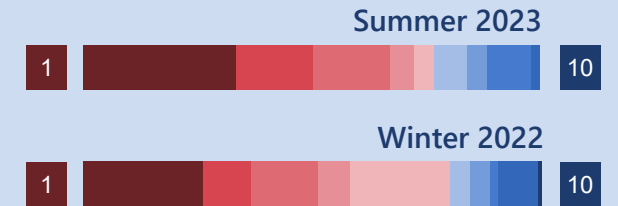
Summer 2023

3.3

Ranking vs. Winter 22  
25 vs. 29

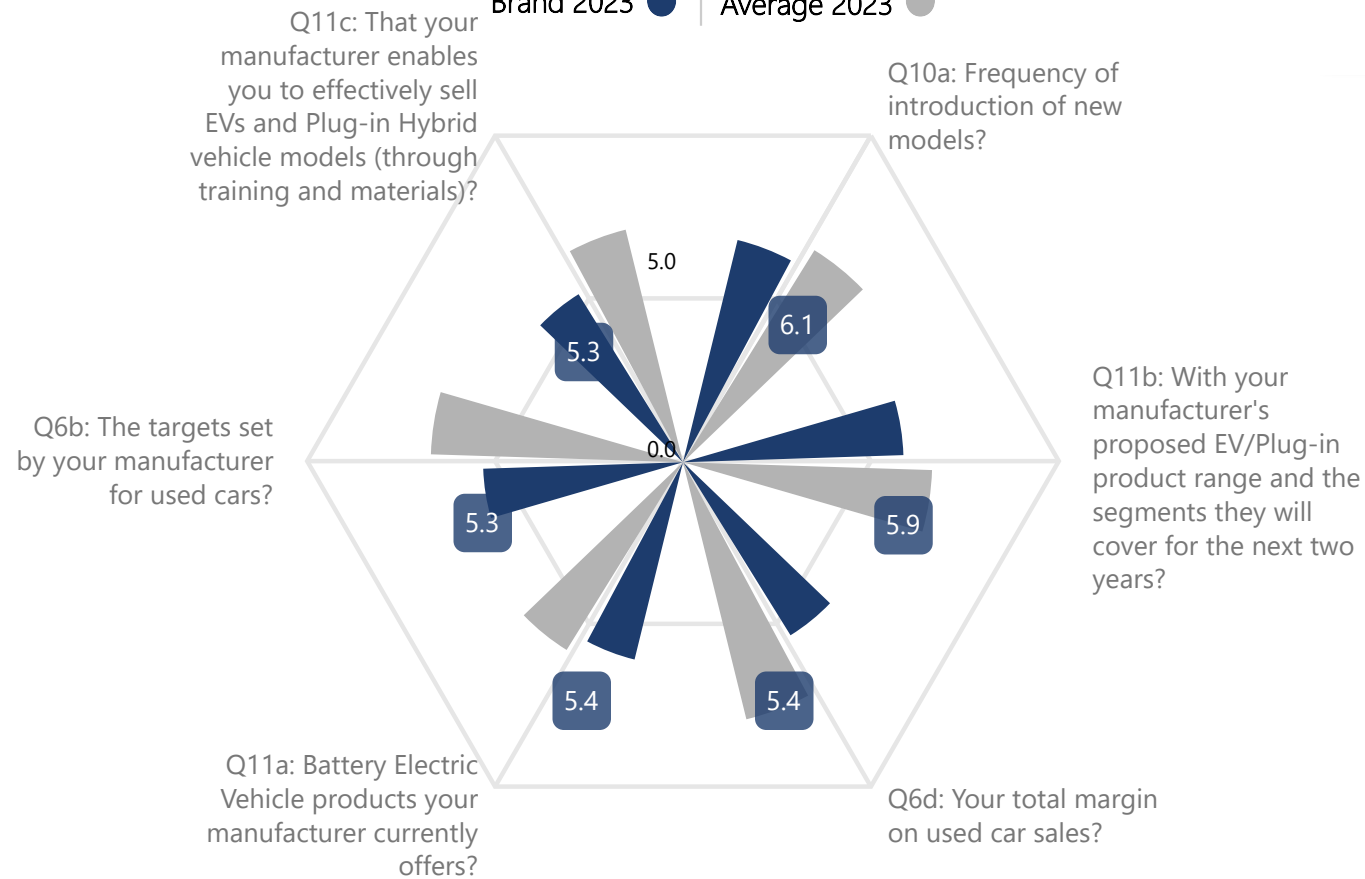
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Score Change  
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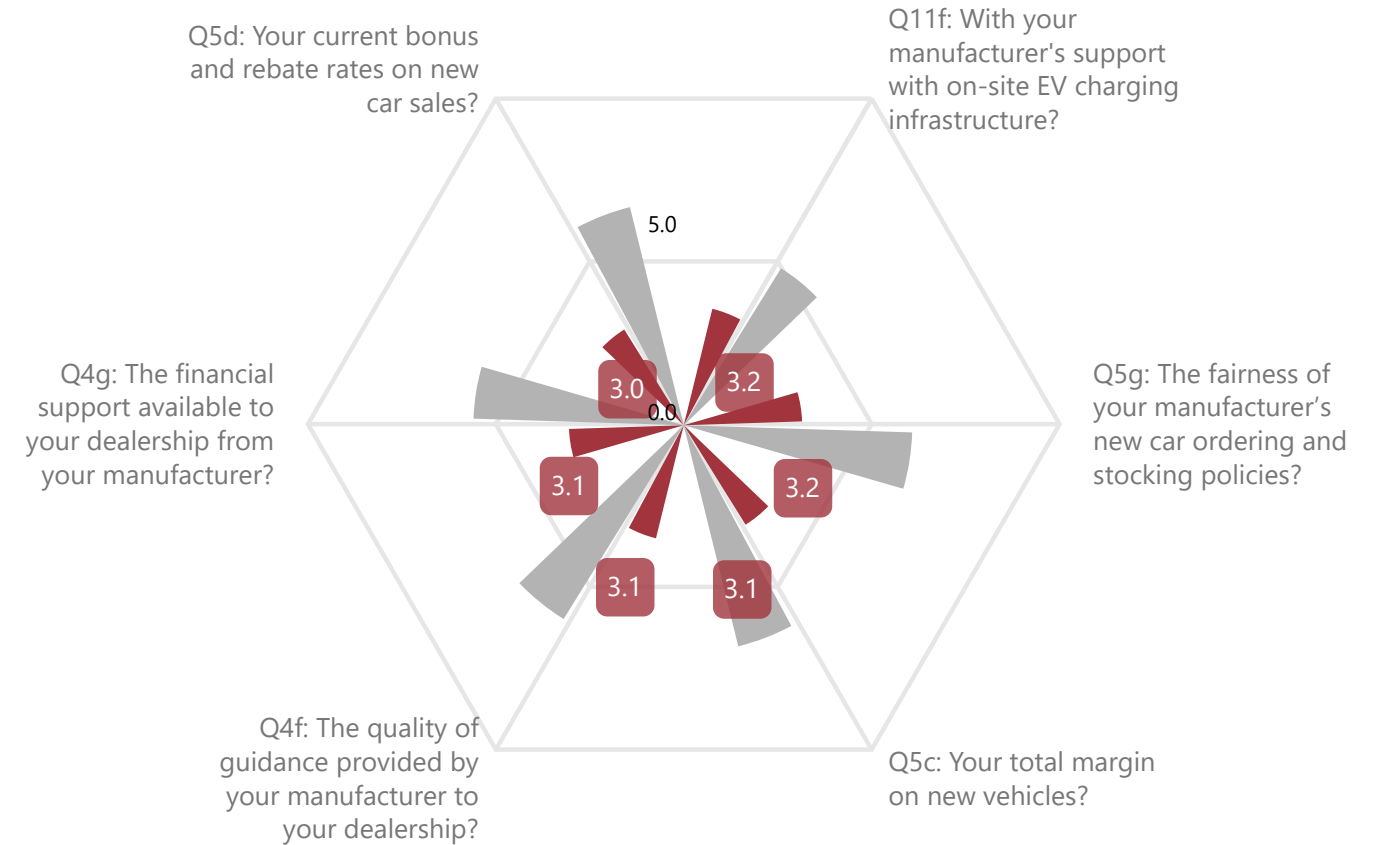
### Top 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



### Bottom 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



Question 4 - Value of the franchise	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	4.5	3.2	-1.3	-2.9
Q4b: The future profit return from representing your franchise?	4.0	3.6	-0.4	-2.1
Q4c: The required level of capital investment?	4.5	3.6	-0.9	-2.4
Q4d: The cost required in your dealership to meet franchised standards?	4.6	3.7	-0.9	-2.3
Q4e: The return on capital for your dealership?	4.1	3.4	-0.7	-2.5
Q4f: The quality of guidance provided by your manufacturer to your dealership?	3.2	3.1	-0.1	-3.0
Q4g: The financial support available to your dealership from your manufacturer?	3.1	3.1	0.0	-2.5

Question 5 - New car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	4.2	3.7	-0.5	-2.5
Q5b: Your new car targeting process?	4.1	3.5	-0.6	-2.6
Q5c: Your total margin on new vehicles?	5.2	3.1	-2.1	-2.9
Q5d: Your current bonus and rebate rates on new car sales?	4.6	3.0	-1.6	-3.0
Q5e: Manufacturer inducement to self register vehicles?	4.5	3.6	-0.9	-2.6
Q5f: Manufacturer's new vehicle supply?	2.3	3.3	+1.0	-2.2
Q5g: The fairness of your manufacturer's new car ordering and stocking policies?	3.5	3.2	-0.3	-2.9
Q5h: The fairness of your manufacturer's demonstrator programme?	5.2	3.7	-1.5	-2.7

Question 6 - Used car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	6.4	5.2	-1.2	-1.9
Q6b: The targets set by your manufacturer for used cars?	6.2	5.3	-0.9	-1.4
Q6c: The cost and quality of your manufacturer's used car warranties?	5.8	4.9	-0.9	-1.8
Q6d: Your total margin on used car sales?	5.8	5.4	-0.4	-1.6
Q6e: Your manufacturer's used car programme?	5.9	5.0	-0.9	-1.8
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	6.0	4.8	-1.2	-1.8

Question 7 - Aftersales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	5.6	4.9	-0.7	-1.6
Q7b: Quality of technical support?	4.5	4.3	-0.2	-2.0
Q7c: Availability of parts?	2.7	3.7	+1.0	-2.1
Q7d: Price of manufacturer parts compared with parts factors?	4.1	4.0	-0.1	-1.8
Q7e: Service profitability earnings?	5.4	4.8	-0.6	-1.6
Q7f: Manufacturer service plan rates and recovery?	5.3	4.7	-0.6	-1.6
Q7g: The fairness of your manufacturer's warranty policy for you and your cust...	5.9	4.6	-1.3	-2.0
Q7h: Your manufacturer's stocking policy for parts/accessories?	5.9	4.9	-1.0	-1.7

### Question 8 - Finance

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	3.9	4.1	+0.2	-2.4
Q8b: The reasonableness of the finance targets set by your manufacturer?	5.3	4.4	-0.9	-2.3
Q8c: The earnings potential of your manufacturer's finance programme?	4.1	3.7	-0.4	-2.2
Q8d: The support you receive from your manufacturer's finance house?	5.8	4.1	-1.7	-2.4

### Question 9 - Dealer/Manufacturer relationships

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	3.6	3.2	-0.4	-3.3
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	3.2	3.2	0.0	-2.9
Q9c: Your manufacturer's dealer council/franchise board?	5.1	4.6	-0.5	-2.0
Q9d: Your manufacturer's response to your communications with them?	3.8	3.3	-0.5	-3.1
Q9e: Your manufacturer dealer standards are fair and reasonable?	4.7	4.1	-0.6	-2.4
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	4.0	3.5	-0.5	-2.7
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	4.0	3.8	-0.2	-2.6
Q9h: The value of manufacturer field staff to your business?	3.8	3.5	-0.3	-2.8
Q9i: The quality of your manufacturer's training?	5.3	4.7	-0.6	-2.2
Q9j: The cost of manufacturer's training?	4.9	4.1	-0.8	-2.2
Q9k: Your manufacturer's apprenticeship programme?	5.6	5.1	-0.5	-1.9
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	3.9	3.3	-0.6	-2.7

### Question 10 - Product and marketing

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q10a: Frequency of introduction of new models?	6.6	6.1	-0.5	-0.5
Q10b: Product value and pricing?	4.2	4.5	+0.3	-2.0
Q10c: Product advertising?	4.3	4.2	-0.1	-2.2

### Question 11 - Electric vehicle/Plug-in vehicles

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q11a: Battery Electric Vehicle products your manufacturer currently offers?	6.0	5.4	-0.6	-0.5
Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	6.8	5.9	-0.9	-0.8
Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	5.8	5.3	-0.5	-1.1
Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	5.2	3.8	-1.4	-1.6
Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	4.6	3.3	-1.3	-1.9
Q11f: With your manufacturer's support with on-site EV charging infrastructure?		3.2	-	-1.7

### Question 12 & 13 - Overall Rating

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	3.9	3.3	-0.6	-3.0
Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	3.9	3.4	-0.5	-3.0

## Overall Manufacturer Rating

Q12: How would you rate your manufacturer overall on a scale of 1 to 10?

Winter 2022

5.5

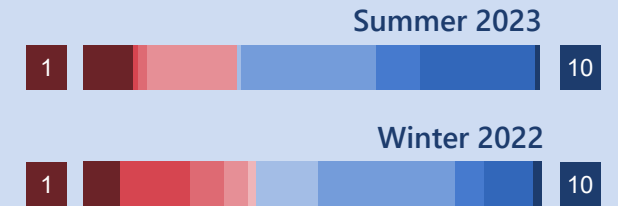
Summer 2023

6.2

Ranking vs. Winter 22  
17 vs. 21

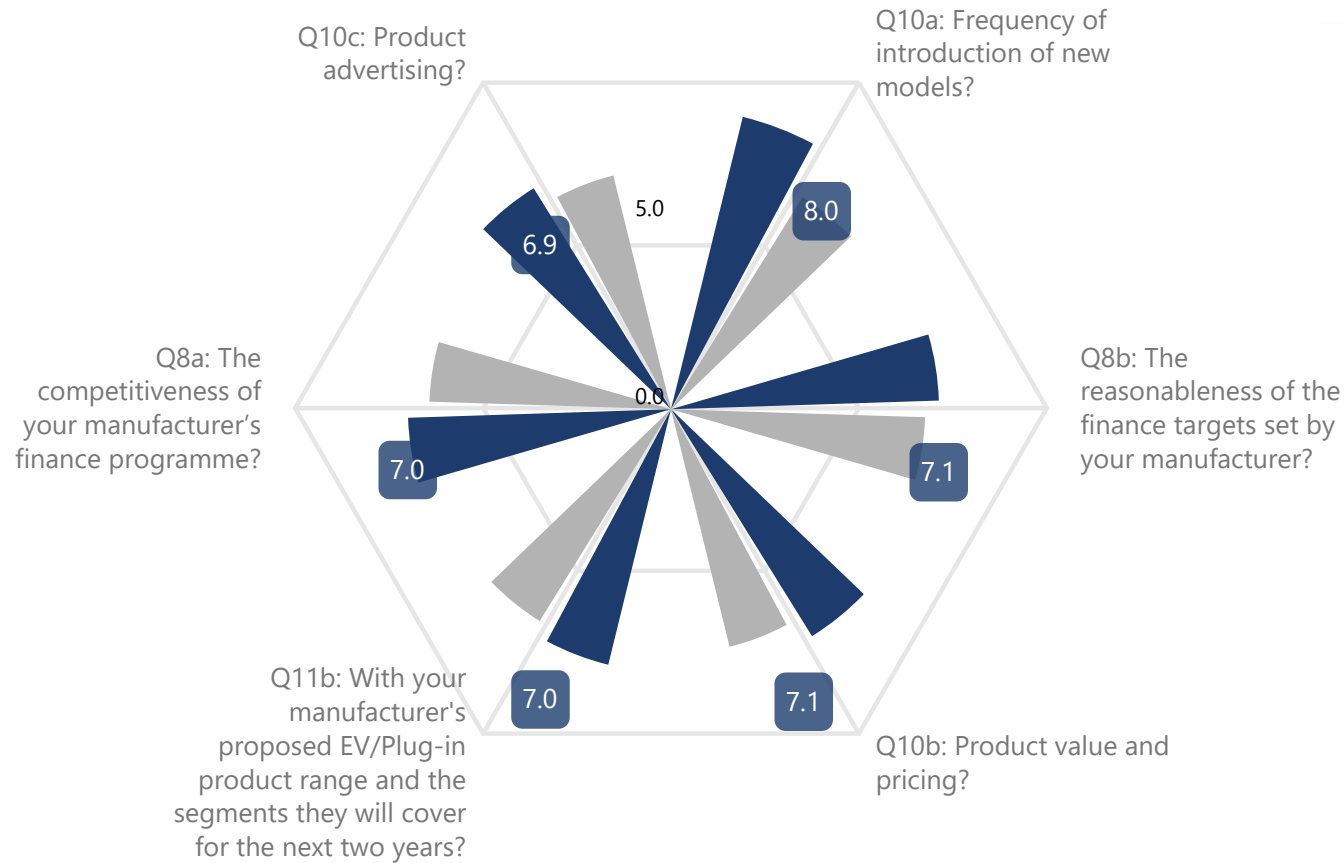
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Score Change  
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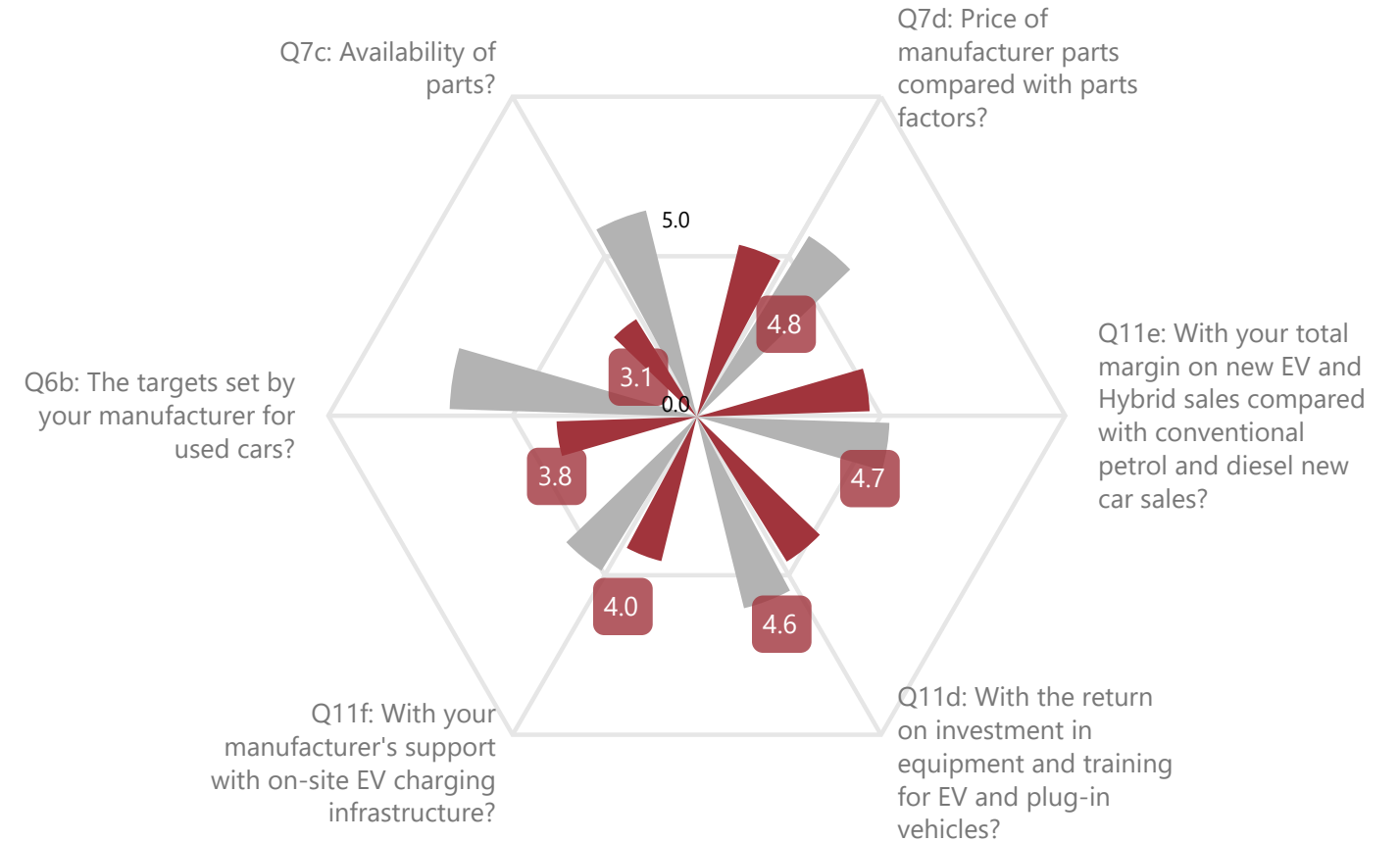
### Top 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



### Bottom 6 Questions vs Average

Brand 2023 ● | Average 2023 ●





Question 4 - Value of the franchise	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	5.5	5.9	+0.4	-0.3
Q4b: The future profit return from representing your franchise?	5.6	6.6	+1.0	+0.8
Q4c: The required level of capital investment?	5.5	5.8	+0.3	-0.2
Q4d: The cost required in your dealership to meet franchised standards?	5.5	5.6	+0.1	-0.4
Q4e: The return on capital for your dealership?	5.5	5.6	+0.1	-0.3
Q4f: The quality of guidance provided by your manufacturer to your dealership?	5.3	6.1	+0.8	+0.1
Q4g: The financial support available to your dealership from your manufacturer?	4.9	5.2	+0.3	-0.4

Question 5 - New car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	5.3	5.5	+0.2	-0.6
Q5b: Your new car targeting process?	5.1	5.4	+0.3	-0.6
Q5c: Your total margin on new vehicles?	5.0	5.1	+0.1	-1.0
Q5d: Your current bonus and rebate rates on new car sales?	5.1	5.3	+0.2	-0.7
Q5e: Manufacturer inducement to self register vehicles?	5.1	6.0	+0.9	-0.2
Q5f: Manufacturer's new vehicle supply?	4.4	5.8	+1.4	+0.3
Q5g: The fairness of your manufacturer's new car ordering and stocking policies?	5.2	6.4	+1.2	+0.3
Q5h: The fairness of your manufacturer's demonstrator programme?	5.4	6.5	+1.1	+0.1

Question 6 - Used car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	6.1	5.4	-0.7	-1.7
Q6b: The targets set by your manufacturer for used cars?	6.3	3.8	-2.5	-2.9
Q6c: The cost and quality of your manufacturer's used car warranties?	5.5	5.2	-0.3	-1.4
Q6d: Your total margin on used car sales?	6.9	6.7	-0.2	-0.4
Q6e: Your manufacturer's used car programme?	4.8	5.0	+0.2	-1.8
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	6.3	5.9	-0.4	-0.7

Question 7 - Aftersales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	5.5	5.7	+0.2	-0.7
Q7b: Quality of technical support?	5.7	5.7	0.0	-0.5
Q7c: Availability of parts?	3.2	3.1	-0.1	-2.6
Q7d: Price of manufacturer parts compared with parts factors?	4.1	4.8	+0.7	-1.0
Q7e: Service profitability earnings?	4.7	5.4	+0.7	-1.0
Q7f: Manufacturer service plan rates and recovery?	5.5	6.1	+0.6	-0.2
Q7g: The fairness of your manufacturer's warranty policy for you and your cust...	6.1	5.8	-0.3	-0.8
Q7h: Your manufacturer's stocking policy for parts/accessories?	6.0	5.3	-0.7	-1.3

### Question 8 - Finance

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	6.4	7.0	+0.6	+0.6
Q8b: The reasonableness of the finance targets set by your manufacturer?	6.6	7.1	+0.5	+0.4
Q8c: The earnings potential of your manufacturer's finance programme?	5.9	5.9	0.0	-0.0
Q8d: The support you receive from your manufacturer's finance house?	6.7	6.6	-0.1	+0.1

### Question 9 - Dealer/Manufacturer relationships

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	6.2	6.6	+0.4	+0.0
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	5.7	6.0	+0.3	-0.1
Q9c: Your manufacturer's dealer council/franchise board?	6.3	6.4	+0.1	-0.2
Q9d: Your manufacturer's response to your communications with them?	5.6	6.3	+0.7	-0.0
Q9e: Your manufacturer dealer standards are fair and reasonable?	5.7	5.6	-0.1	-1.0
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	5.2	5.0	-0.2	-1.2
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	5.8	5.6	-0.2	-0.7
Q9h: The value of manufacturer field staff to your business?	6.7	6.6	-0.1	+0.3
Q9i: The quality of your manufacturer's training?	5.4	6.7	+1.3	-0.2
Q9j: The cost of manufacturer's training?	5.3	5.5	+0.2	-0.8
Q9k: Your manufacturer's apprenticeship programme?	6.2	5.4	-0.8	-1.6
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	6.2	6.0	-0.2	-0.1

### Question 10 - Product and marketing

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q10a: Frequency of introduction of new models?	6.0	8.0	+2.0	+1.4
Q10b: Product value and pricing?	5.8	7.1	+1.3	+0.6
Q10c: Product advertising?	6.2	6.9	+0.7	+0.5

### Question 11 - Electric vehicle/Plug-in vehicles

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q11a: Battery Electric Vehicle products your manufacturer currently offers?	5.3	5.9	+0.6	+0.0
Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	7.1	7.0	-0.1	+0.4
Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	6.7	6.7	0.0	+0.3
Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	5.6	4.6	-1.0	-0.7
Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	4.9	4.7	-0.2	-0.5
Q11f: With your manufacturer's support with on-site EV charging infrastructure?		4.0	-	-0.9

### Question 12 & 13 - Overall Rating

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	5.5	6.2	+0.7	-0.1
Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	5.4	6.2	+0.8	-0.2

## Overall Manufacturer Rating

Q12: How would you rate your manufacturer overall on a scale of 1 to 10?

Winter 2022

4.1

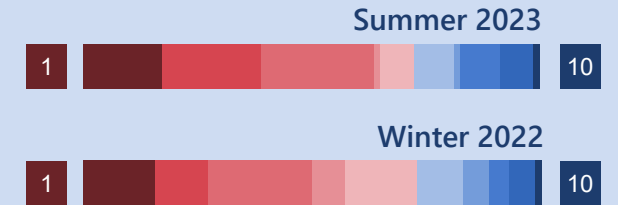
Summer 2023

3.9

Ranking vs. Winter 22  
23 vs. 25

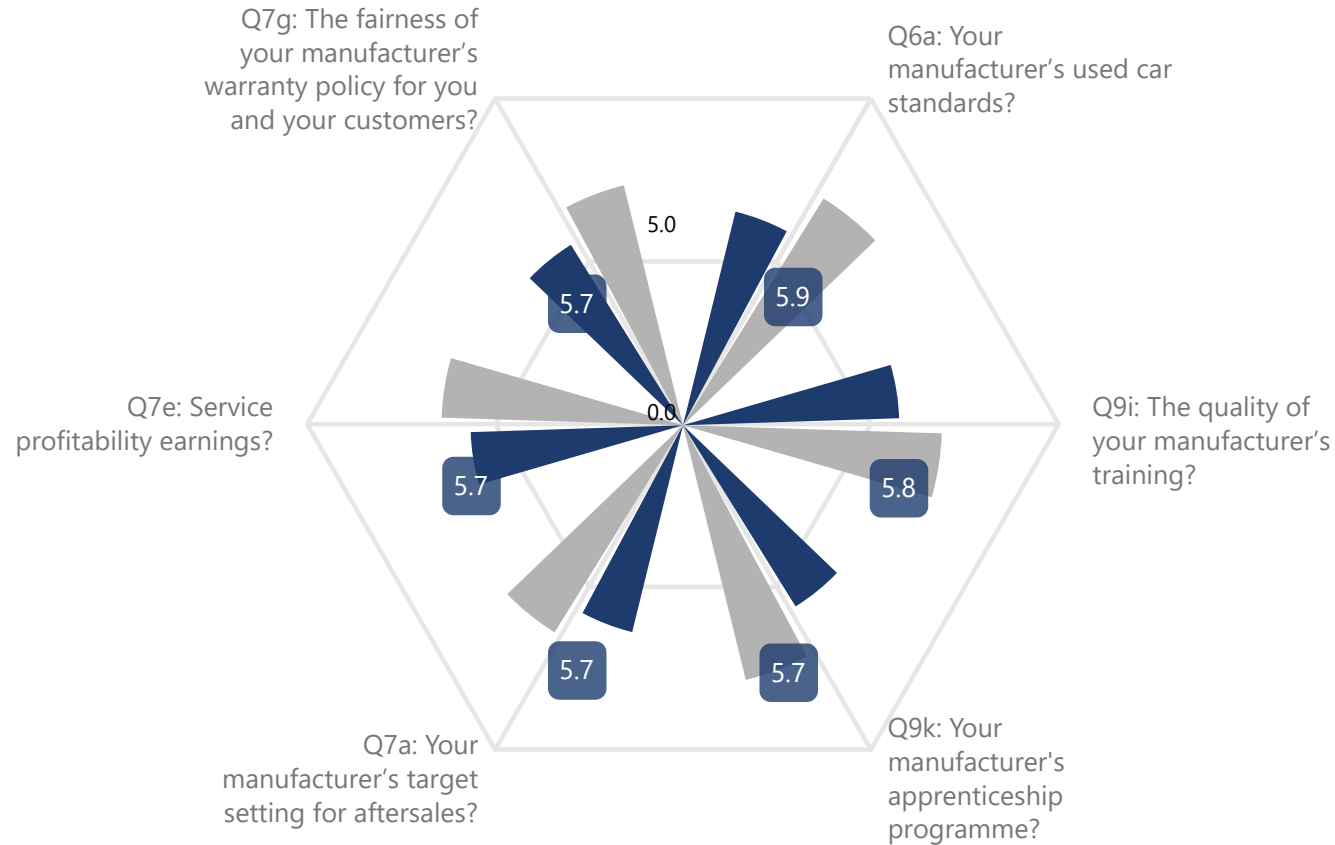
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Score Change  
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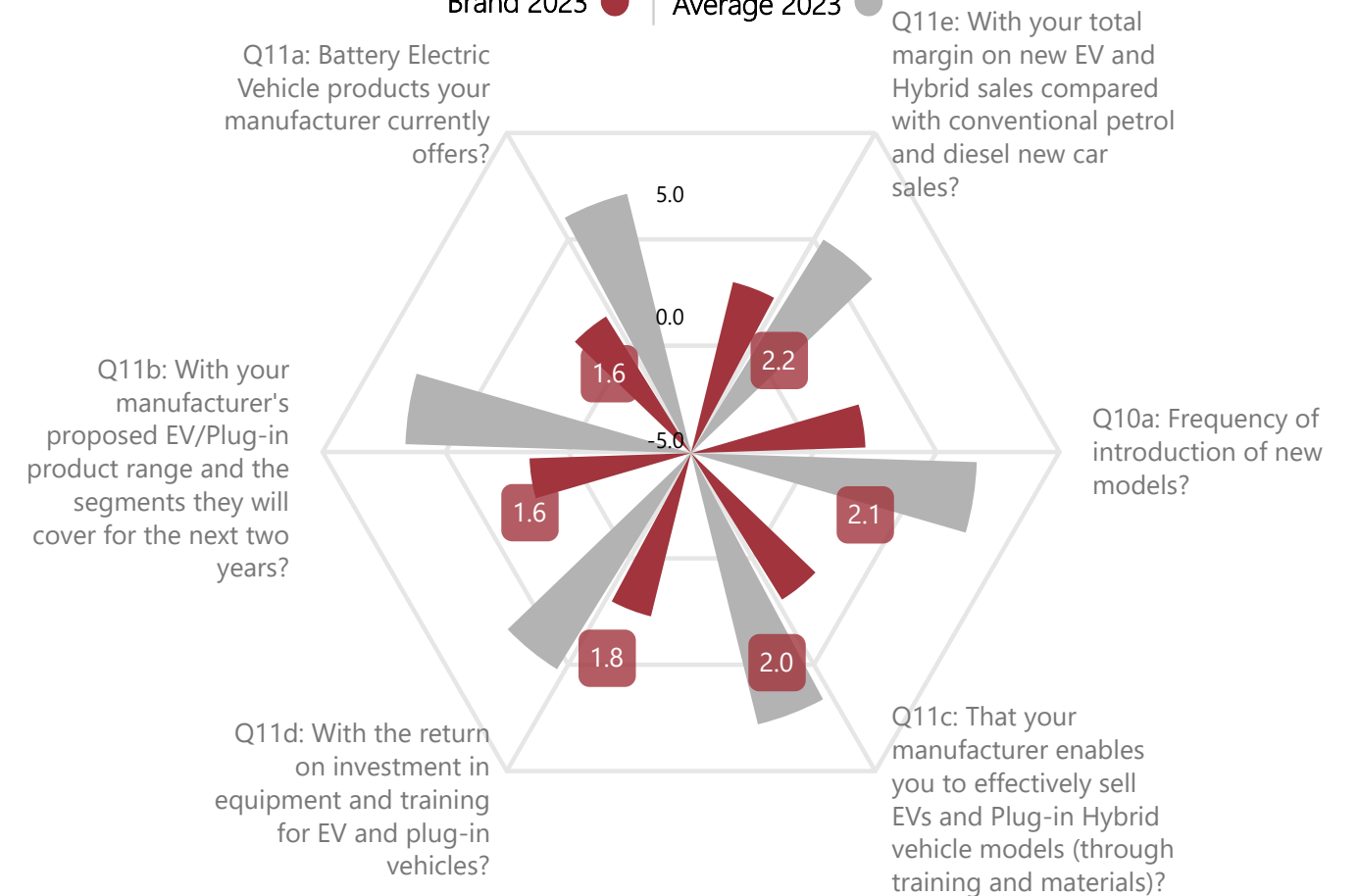
### Top 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



### Bottom 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



Question 4 - Value of the franchise	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	3.5	3.9	+0.4	-2.3
Q4b: The future profit return from representing your franchise?	3.9	3.3	-0.6	-2.5
Q4c: The required level of capital investment?	5.0	4.8	-0.2	-1.3
Q4d: The cost required in your dealership to meet franchised standards?	4.5	4.5	0.0	-1.5
Q4e: The return on capital for your dealership?	3.5	3.9	+0.4	-2.1
Q4f: The quality of guidance provided by your manufacturer to your dealership?	4.1	4.2	+0.1	-1.8
Q4g: The financial support available to your dealership from your manufacturer?	3.9	3.7	-0.2	-1.9

Question 5 - New car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	5.3	5.4	+0.1	-0.7
Q5b: Your new car targeting process?	4.8	5.5	+0.7	-0.5
Q5c: Your total margin on new vehicles?	4.8	5.1	+0.3	-0.9
Q5d: Your current bonus and rebate rates on new car sales?	4.3	4.8	+0.5	-1.2
Q5e: Manufacturer inducement to self register vehicles?	5.3	5.1	-0.2	-1.1
Q5f: Manufacturer's new vehicle supply?	2.8	3.1	+0.3	-2.4
Q5g: The fairness of your manufacturer's new car ordering and stocking policies?	4.2	4.6	+0.4	-1.5
Q5h: The fairness of your manufacturer's demonstrator programme?	4.9	4.9	0.0	-1.5

Question 6 - Used car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	6.1	5.9	-0.2	-1.2
Q6b: The targets set by your manufacturer for used cars?	5.2	5.0	-0.2	-1.7
Q6c: The cost and quality of your manufacturer's used car warranties?	5.8	5.2	-0.6	-1.5
Q6d: Your total margin on used car sales?	5.9	5.5	-0.4	-1.5
Q6e: Your manufacturer's used car programme?	5.1	5.3	+0.2	-1.5
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	5.1	5.3	+0.2	-1.2

Question 7 - Aftersales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	4.6	5.7	+1.1	-0.8
Q7b: Quality of technical support?	4.8	4.8	0.0	-1.4
Q7c: Availability of parts?	4.8	4.8	0.0	-1.0
Q7d: Price of manufacturer parts compared with parts factors?	4.7	5.0	+0.3	-0.8
Q7e: Service profitability earnings?	5.6	5.7	+0.1	-0.8
Q7f: Manufacturer service plan rates and recovery?	5.6	5.6	0.0	-0.7
Q7g: The fairness of your manufacturer's warranty policy for you and your cust...	5.5	5.7	+0.2	-0.9
Q7h: Your manufacturer's stocking policy for parts/accessories?	5.0	5.1	+0.1	-1.5

**Question 8 - Finance**

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	5.7	5.5	-0.2	-0.9
Q8b: The reasonableness of the finance targets set by your manufacturer?	5.5	5.6	+0.1	-1.2
Q8c: The earnings potential of your manufacturer's finance programme?	5.0	5.1	+0.1	-0.8
Q8d: The support you receive from your manufacturer's finance house?	5.3	5.0	-0.3	-1.5

**Question 9 - Dealer/Manufacturer relationships**

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	5.0	4.9	-0.1	-1.7
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	4.6	4.7	+0.1	-1.5
Q9c: Your manufacturer's dealer council/franchise board?	4.9	5.2	+0.3	-1.4
Q9d: Your manufacturer's response to your communications with them?	4.9	4.7	-0.2	-1.7
Q9e: Your manufacturer dealer standards are fair and reasonable?	5.1	5.1	0.0	-1.5
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	5.0	4.8	-0.2	-1.4
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	5.1	5.0	-0.1	-1.3
Q9h: The value of manufacturer field staff to your business?	5.4	5.1	-0.3	-1.2
Q9i: The quality of your manufacturer's training?	5.4	5.8	+0.4	-1.1
Q9j: The cost of manufacturer's training?	4.9	4.9	0.0	-1.4
Q9k: Your manufacturer's apprenticeship programme?	6.2	5.7	-0.5	-1.3
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	4.3	4.3	0.0	-1.7

**Question 10 - Product and marketing**

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q10a: Frequency of introduction of new models?	2.4	2.1	-0.3	-4.5
Q10b: Product value and pricing?	4.4	4.6	+0.2	-1.9
Q10c: Product advertising?	3.8	3.6	-0.2	-2.8

**Question 11 - Electric vehicle/Plug-in vehicles**

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q11a: Battery Electric Vehicle products your manufacturer currently offers?	2.7	1.6	-1.1	-4.3
Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	2.2	1.6	-0.6	-5.1
Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	2.8	2.0	-0.8	-4.4
Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	2.4	1.8	-0.6	-3.5
Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	3.3	2.2	-1.1	-3.1
Q11f: With your manufacturer's support with on-site EV charging infrastructure?		2.6	-	-2.3

**Question 12 & 13 - Overall Rating**

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	4.1	3.9	-0.2	-2.4
Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	3.9	3.4	-0.5	-3.0

## Overall Manufacturer Rating

Q12: How would you rate your manufacturer overall on a scale of 1 to 10?

Winter 2022

6.8

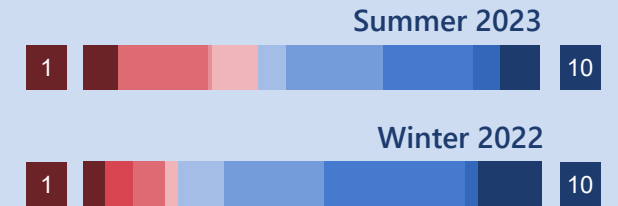
Summer 2023

6.0

Ranking vs. Winter 22  
18 vs. 17

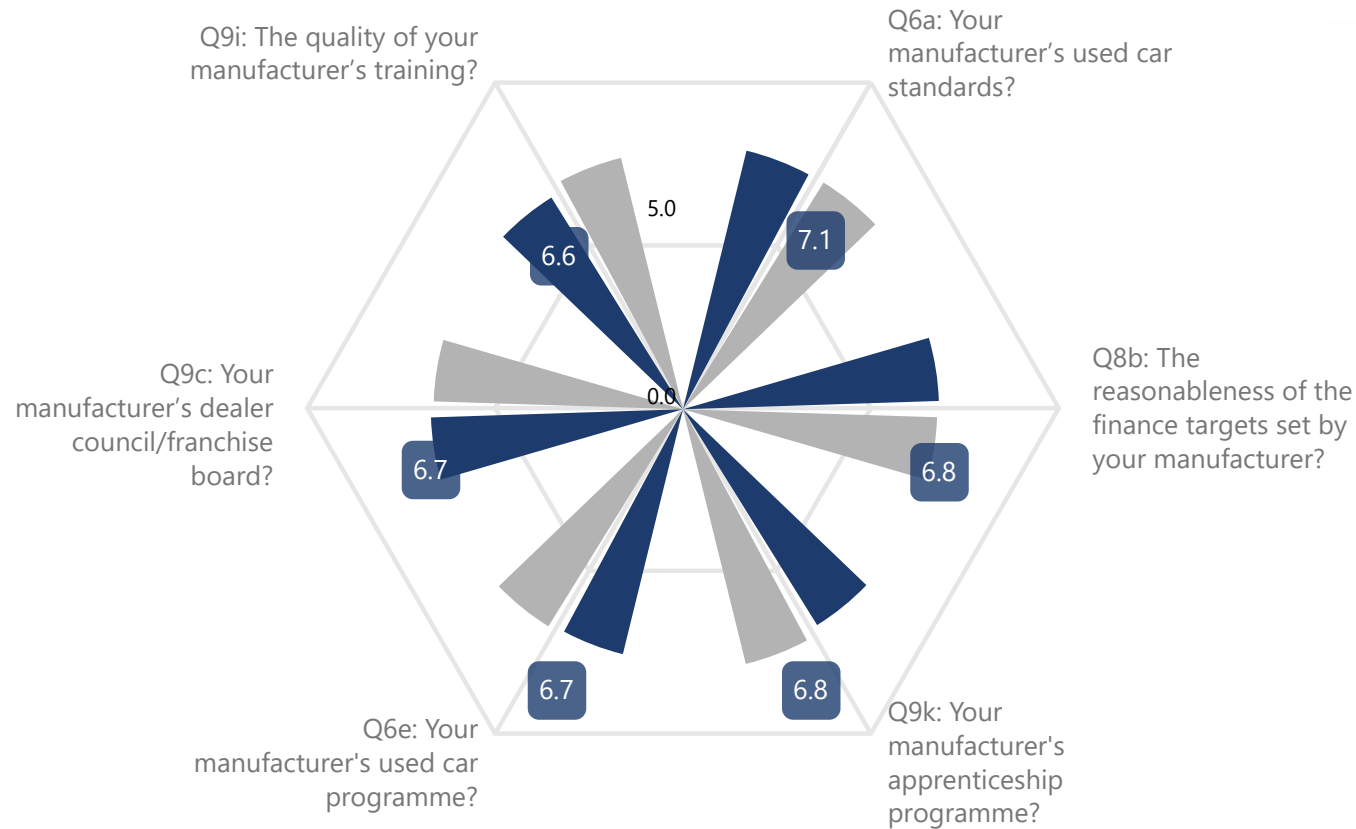
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Score Change  
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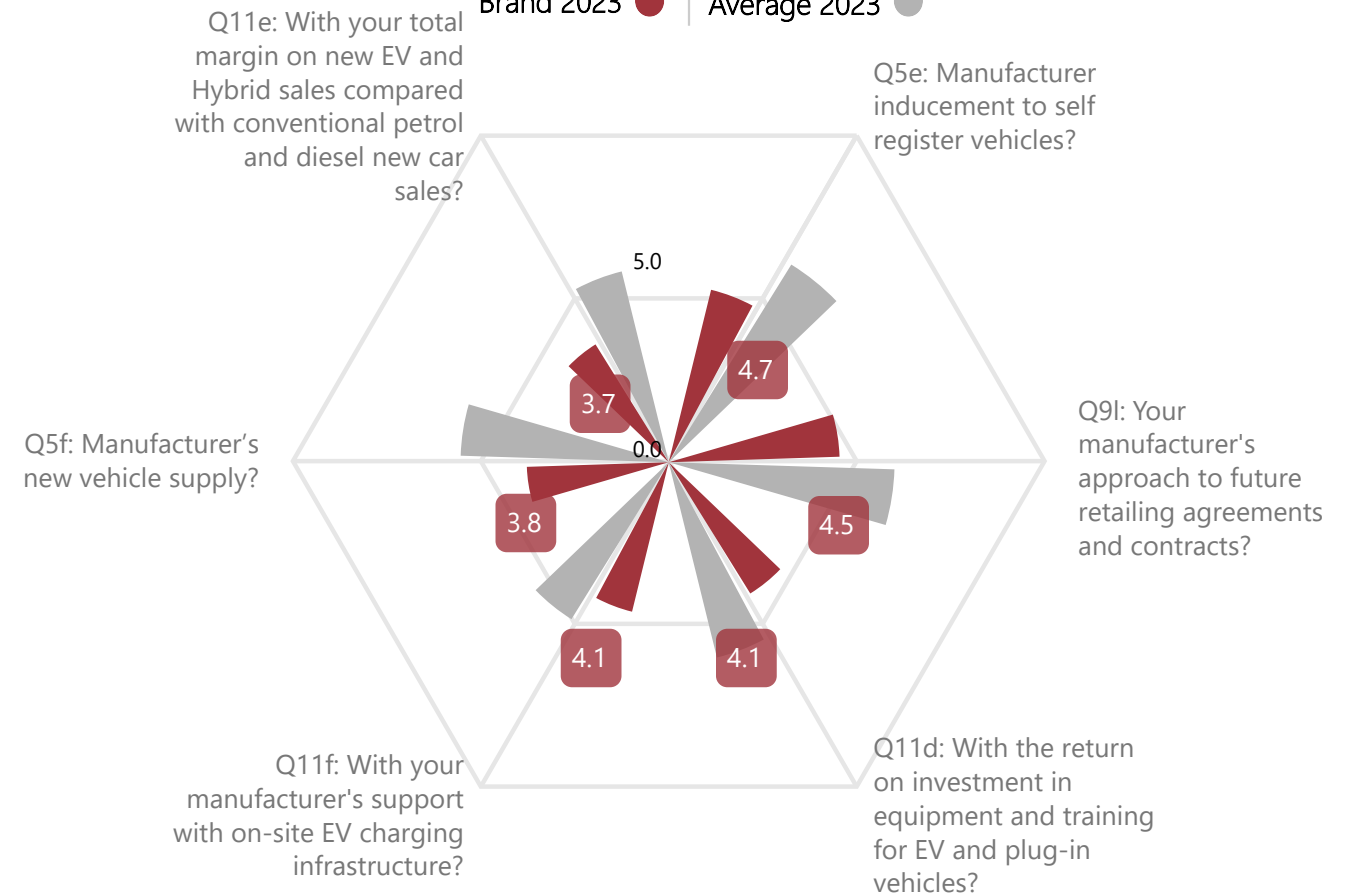
## Top 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



## Bottom 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



Question 4 - Value of the franchise	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	6.6	6.2	-0.4	+0.0
Q4b: The future profit return from representing your franchise?	5.6	5.0	-0.6	-0.8
Q4c: The required level of capital investment?	6.4	5.8	-0.6	-0.2
Q4d: The cost required in your dealership to meet franchised standards?	6.1	5.5	-0.6	-0.5
Q4e: The return on capital for your dealership?	6.1	5.6	-0.5	-0.3
Q4f: The quality of guidance provided by your manufacturer to your dealership?	6.4	5.7	-0.7	-0.4
Q4g: The financial support available to your dealership from your manufacturer?	5.7	5.1	-0.6	-0.5

Question 5 - New car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	6.3	6.2	-0.1	+0.1
Q5b: Your new car targeting process?	6.5	6.3	-0.2	+0.3
Q5c: Your total margin on new vehicles?	5.9	5.4	-0.5	-0.6
Q5d: Your current bonus and rebate rates on new car sales?	6.1	5.5	-0.6	-0.5
Q5e: Manufacturer inducement to self register vehicles?	6.3	4.7	-1.6	-1.5
Q5f: Manufacturer's new vehicle supply?	3.1	3.8	+0.7	-1.8
Q5g: The fairness of your manufacturer's new car ordering and stocking policies?	4.7	4.9	+0.2	-1.2
Q5h: The fairness of your manufacturer's demonstrator programme?	6.3	5.3	-1.0	-1.1

Question 6 - Used car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	6.9	7.1	+0.2	-0.0
Q6b: The targets set by your manufacturer for used cars?	7.0	6.6	-0.4	-0.1
Q6c: The cost and quality of your manufacturer's used car warranties?	6.9	6.2	-0.7	-0.4
Q6d: Your total margin on used car sales?	6.9	6.5	-0.4	-0.6
Q6e: Your manufacturer's used car programme?	6.5	6.7	+0.2	-0.1
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	5.9	5.9	0.0	-0.6

Question 7 - Aftersales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	5.4	5.5	+0.1	-1.0
Q7b: Quality of technical support?	5.7	5.5	-0.2	-0.7
Q7c: Availability of parts?	6.0	5.6	-0.4	-0.2
Q7d: Price of manufacturer parts compared with parts factors?	5.6	5.3	-0.3	-0.5
Q7e: Service profitability earnings?	5.9	5.7	-0.2	-0.7
Q7f: Manufacturer service plan rates and recovery?	5.1	5.4	+0.3	-0.9
Q7g: The fairness of your manufacturer's warranty policy for you and your cust...	5.7	5.4	-0.3	-1.2
Q7h: Your manufacturer's stocking policy for parts/accessories?	6.6	6.3	-0.3	-0.3

### Question 8 - Finance

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	6.6	6.3	-0.3	-0.1
Q8b: The reasonableness of the finance targets set by your manufacturer?	6.8	6.8	0.0	+0.0
Q8c: The earnings potential of your manufacturer's finance programme?	5.9	5.6	-0.3	-0.3
Q8d: The support you receive from your manufacturer's finance house?	5.4	5.8	+0.4	-0.7

### Question 9 - Dealer/Manufacturer relationships

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	7.0	6.4	-0.6	-0.2
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	6.6	5.9	-0.7	-0.2
Q9c: Your manufacturer's dealer council/franchise board?	6.8	6.7	-0.1	+0.1
Q9d: Your manufacturer's response to your communications with them?	6.5	6.6	+0.1	+0.2
Q9e: Your manufacturer dealer standards are fair and reasonable?	6.5	6.1	-0.4	-0.5
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	5.5	5.2	-0.3	-1.0
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	6.4	5.9	-0.5	-0.4
Q9h: The value of manufacturer field staff to your business?	6.6	6.4	-0.2	+0.0
Q9i: The quality of your manufacturer's training?	6.6	6.6	0.0	-0.3
Q9j: The cost of manufacturer's training?	5.7	5.4	-0.3	-0.9
Q9k: Your manufacturer's apprenticeship programme?	6.6	6.8	+0.2	-0.2
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	5.8	4.5	-1.3	-1.5

### Question 10 - Product and marketing

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q10a: Frequency of introduction of new models?	5.5	5.5	0.0	-1.1
Q10b: Product value and pricing?	6.6	6.0	-0.6	-0.5
Q10c: Product advertising?	6.2	5.6	-0.6	-0.8

### Question 11 - Electric vehicle/Plug-in vehicles

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q11a: Battery Electric Vehicle products your manufacturer currently offers?	5.0	4.8	-0.2	-1.1
Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	5.8	5.9	+0.1	-0.7
Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	6.0	5.5	-0.5	-0.9
Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	5.0	4.1	-0.9	-1.2
Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	5.0	3.7	-1.3	-1.5
Q11f: With your manufacturer's support with on-site EV charging infrastructure?		4.1	-	-0.8

### Question 12 & 13 - Overall Rating

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	6.8	6.0	-0.8	-0.3
Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	6.7	6.1	-0.6	-0.3



## Overall Manufacturer Rating

Q12: How would you rate your manufacturer overall on a scale of 1 to 10?

Winter 2022

7.2

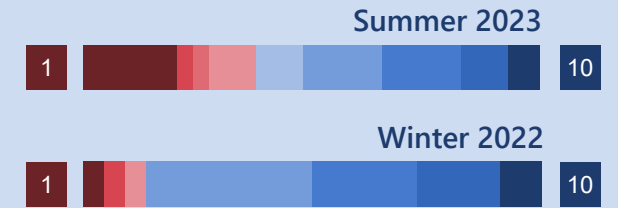
Summer 2023

5.6

Ranking vs. Winter 22  
20 vs. 12

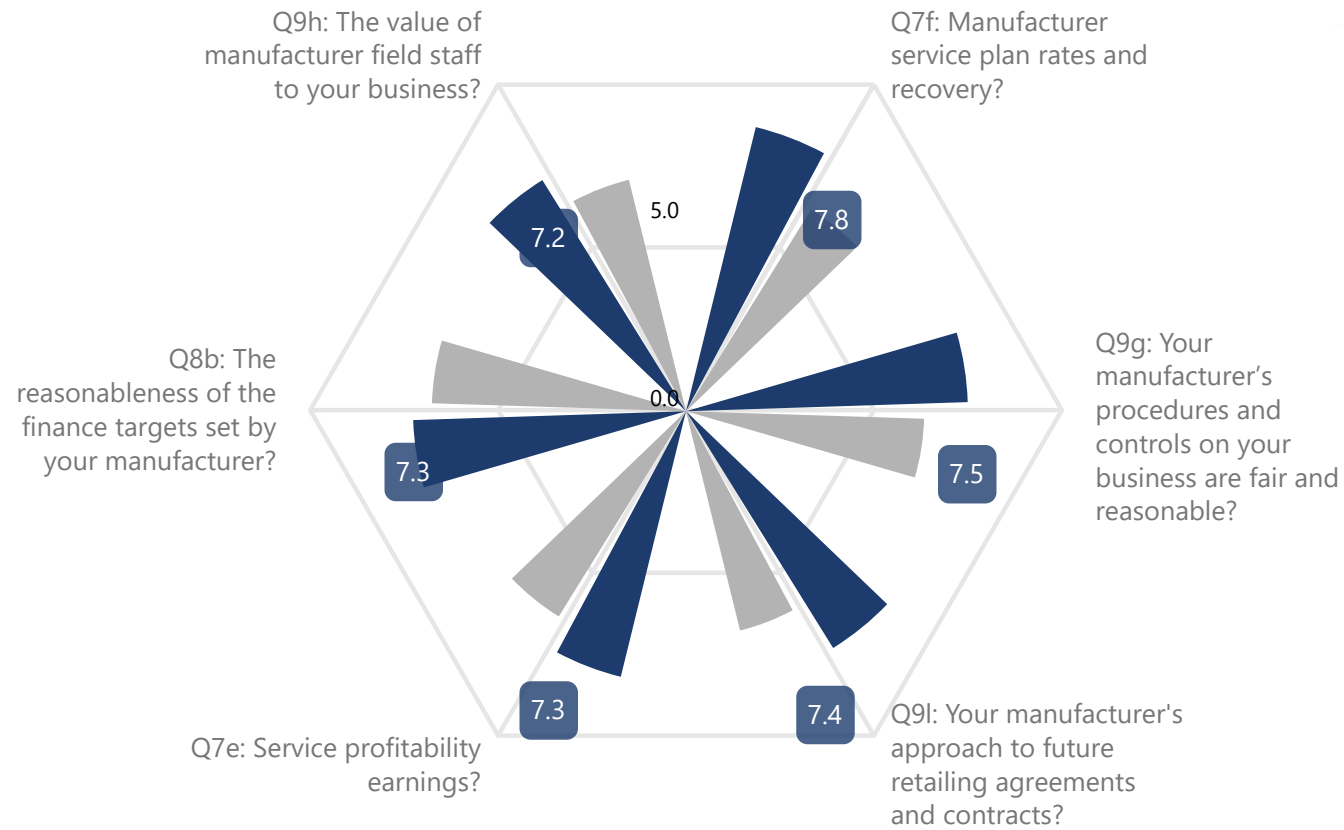
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Score Change  
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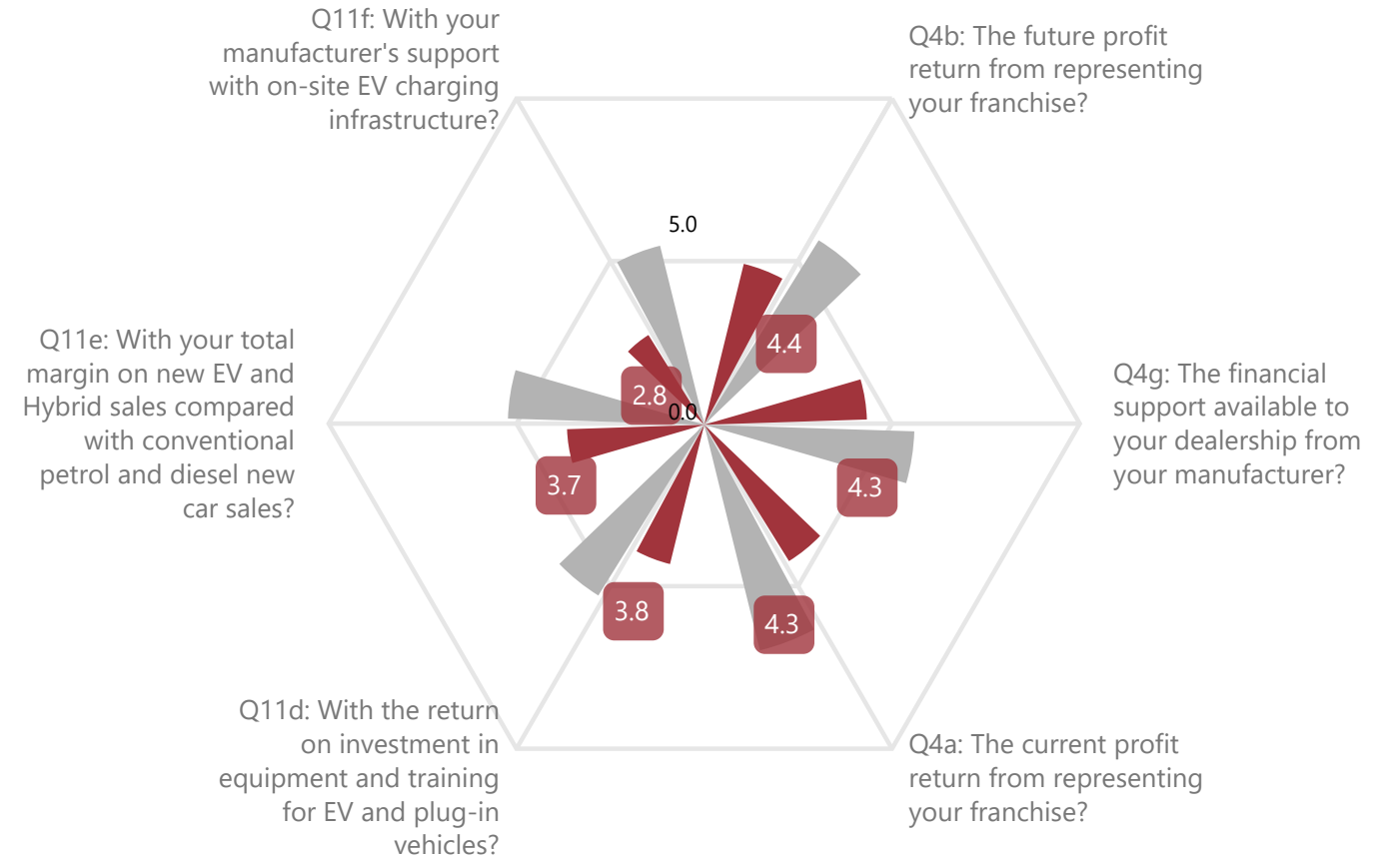
## Top 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



## Bottom 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



Question 4 - Value of the franchise	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	6.3	4.3	-2.0	-1.9
Q4b: The future profit return from representing your franchise?	6.6	4.4	-2.2	-1.4
Q4c: The required level of capital investment?	7.8	6.1	-1.7	+0.1
Q4d: The cost required in your dealership to meet franchised standards?	7.9	6.3	-1.6	+0.3
Q4e: The return on capital for your dealership?	6.7	4.7	-2.0	-1.2
Q4f: The quality of guidance provided by your manufacturer to your dealership?	7.7	6.2	-1.5	+0.1
Q4g: The financial support available to your dealership from your manufacturer?	6.5	4.3	-2.2	-1.3

Question 5 - New car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	7.0	5.9	-1.1	-0.3
Q5b: Your new car targeting process?	7.5	5.7	-1.8	-0.3
Q5c: Your total margin on new vehicles?	6.0	4.6	-1.4	-1.5
Q5d: Your current bonus and rebate rates on new car sales?	6.7	4.4	-2.3	-1.5
Q5e: Manufacturer inducement to self register vehicles?	6.5	5.8	-0.7	-0.4
Q5f: Manufacturer's new vehicle supply?	6.6	6.8	+0.2	+1.3
Q5g: The fairness of your manufacturer's new car ordering and stocking policies?	7.7	7.2	-0.5	+1.1
Q5h: The fairness of your manufacturer's demonstrator programme?	7.5	5.9	-1.6	-0.5

Question 6 - Used car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	9.2	7.2	-2.0	+0.1
Q6b: The targets set by your manufacturer for used cars?	7.7	6.0	-1.7	-0.7
Q6c: The cost and quality of your manufacturer's used car warranties?	7.8	6.2	-1.6	-0.5
Q6d: Your total margin on used car sales?	8.4	7.1	-1.3	+0.1
Q6e: Your manufacturer's used car programme?	7.3	6.1	-1.2	-0.7
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	8.6	6.8	-1.8	+0.2

Question 7 - Aftersales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	7.9	6.4	-1.5	-0.1
Q7b: Quality of technical support?	7.7	6.6	-1.1	+0.3
Q7c: Availability of parts?	7.0	6.9	-0.1	+1.1
Q7d: Price of manufacturer parts compared with parts factors?	6.4	5.6	-0.8	-0.2
Q7e: Service profitability earnings?	7.7	7.3	-0.4	+0.9
Q7f: Manufacturer service plan rates and recovery?	6.9	7.8	+0.9	+1.5
Q7g: The fairness of your manufacturer's warranty policy for you and your cust...	8.1	7.2	-0.9	+0.6
Q7h: Your manufacturer's stocking policy for parts/accessories?	8.4	7.2	-1.2	+0.6

### Question 8 - Finance

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	6.8	7.1	+0.3	+0.7
Q8b: The reasonableness of the finance targets set by your manufacturer?	7.6	7.3	-0.3	+0.5
Q8c: The earnings potential of your manufacturer's finance programme?	5.8	5.7	-0.1	-0.3
Q8d: The support you receive from your manufacturer's finance house?	6.5	6.7	+0.2	+0.2

### Question 9 - Dealer/Manufacturer relationships

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	8.4	6.9	-1.5	+0.4
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	7.8	6.3	-1.5	+0.1
Q9c: Your manufacturer's dealer council/franchise board?			-	
Q9d: Your manufacturer's response to your communications with them?	8.6	6.8	-1.8	+0.4
Q9e: Your manufacturer dealer standards are fair and reasonable?	8.3	7.2	-1.1	+0.6
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	8.5	7.2	-1.3	+1.0
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	8.3	7.5	-0.8	+1.2
Q9h: The value of manufacturer field staff to your business?	8.5	7.2	-1.3	+0.9
Q9i: The quality of your manufacturer's training?	7.2	6.7	-0.5	-0.2
Q9j: The cost of manufacturer's training?	7.5	7.0	-0.5	+0.7
Q9k: Your manufacturer's apprenticeship programme?	7.1	5.6	-1.5	-1.4
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	7.5	7.4	-0.1	+1.4

### Question 10 - Product and marketing

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q10a: Frequency of introduction of new models?	6.0	5.9	-0.1	-0.8
Q10b: Product value and pricing?	6.9	5.9	-1.0	-0.6
Q10c: Product advertising?	6.5	5.0	-1.5	-1.4

### Question 11 - Electric vehicle/Plug-in vehicles

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q11a: Battery Electric Vehicle products your manufacturer currently offers?	7.2	5.7	-1.5	-0.2
Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	6.6	5.4	-1.2	-1.2
Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	7.2	5.7	-1.5	-0.7
Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	5.9	3.8	-2.1	-1.5
Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	6.0	3.7	-2.3	-1.6
Q11f: With your manufacturer's support with on-site EV charging infrastructure?		2.8	-	-2.1

### Question 12 & 13 - Overall Rating

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	7.2	5.6	-1.6	-0.7
Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	7.0	5.1	-1.9	-1.3

## Overall Manufacturer Rating

Q12: How would you rate your manufacturer overall on a scale of 1 to 10?

Winter 2022

7.7

Summer 2023

8.4

Ranking vs. Winter 22  
5 vs. 9

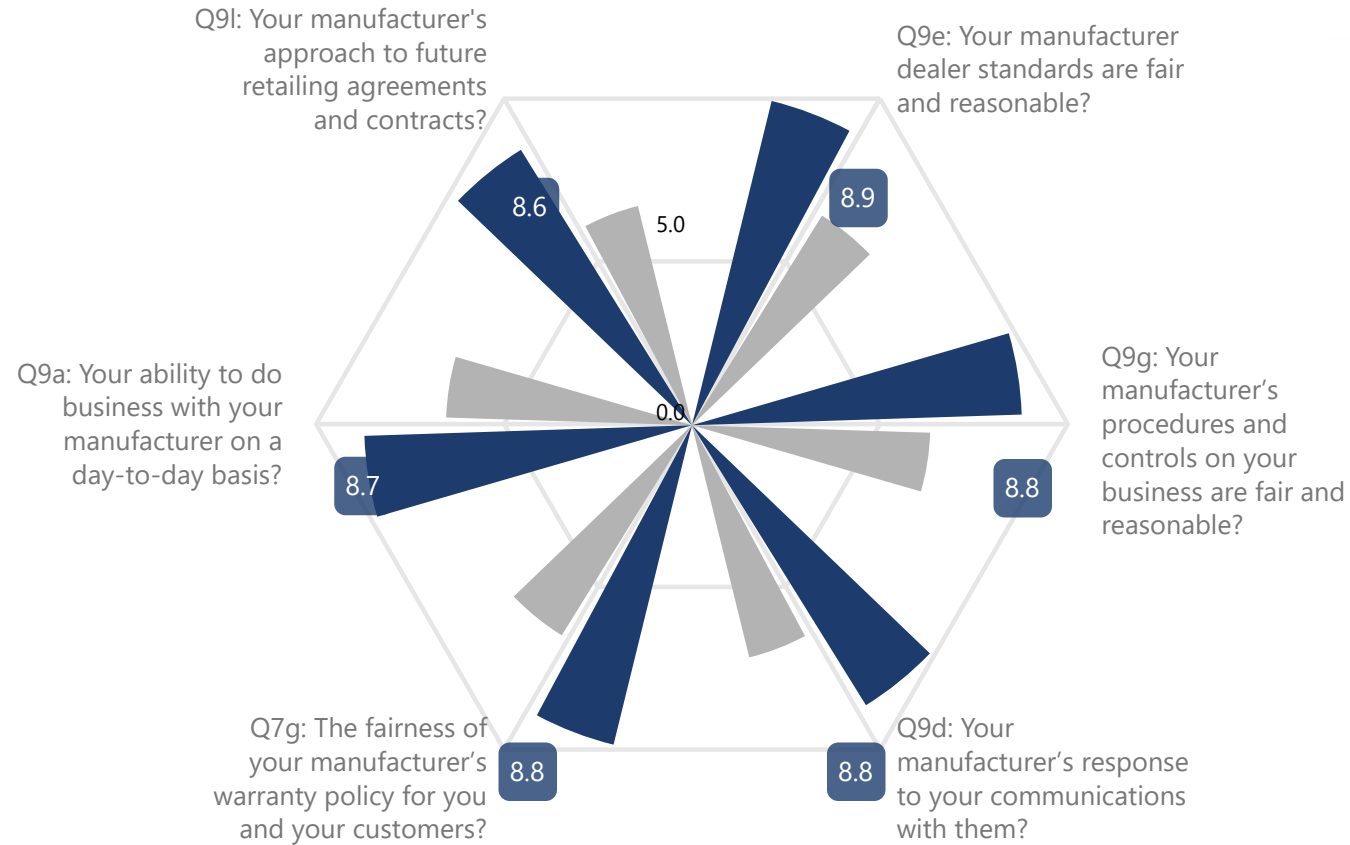
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**+9.1%**

Score Change  
**+0.7 pts**



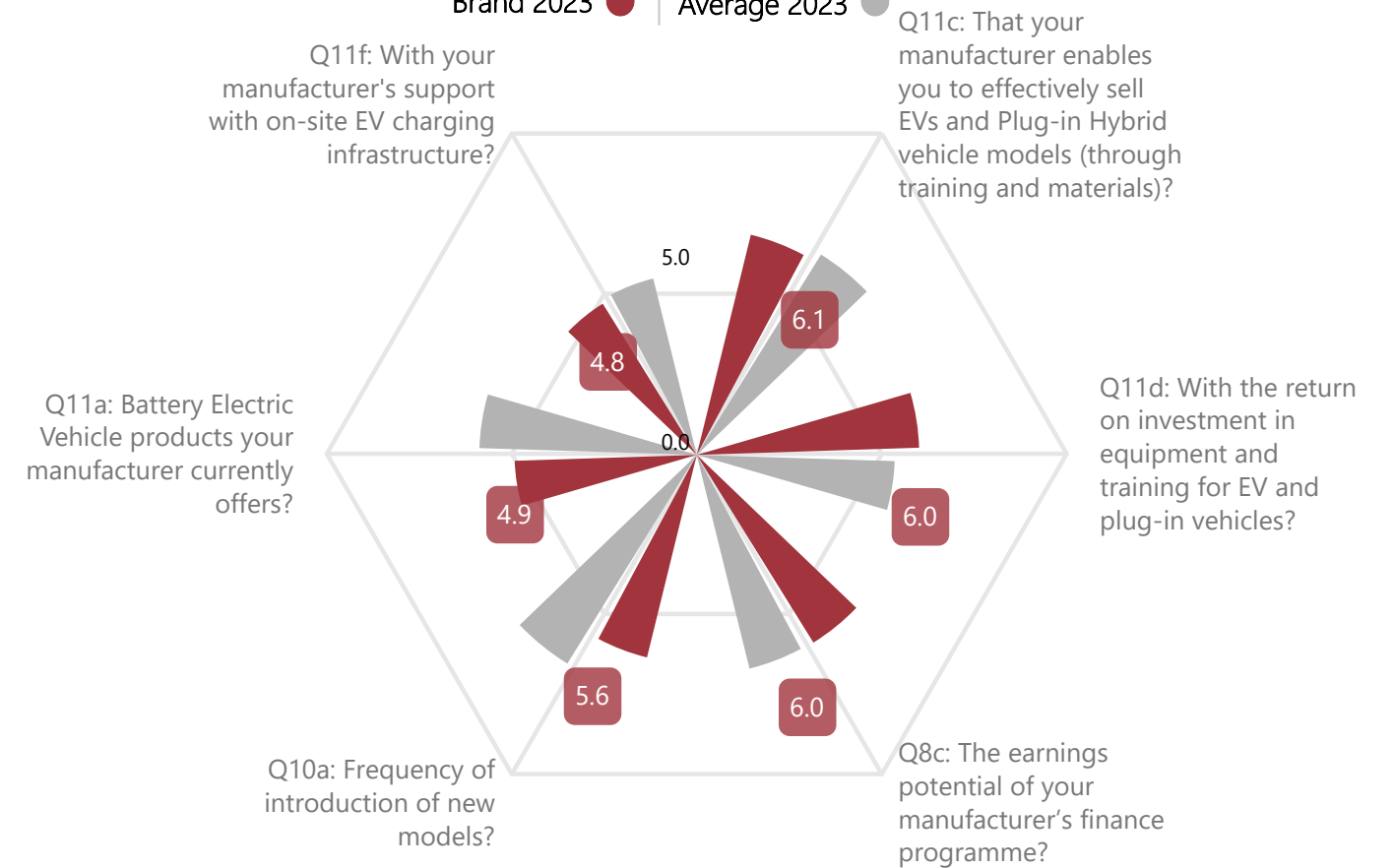
### Top 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



### Bottom 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



Question 4 - Value of the franchise	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	6.1	7.6	+1.5	+1.4
Q4b: The future profit return from representing your franchise?	6.9	7.7	+0.8	+1.9
Q4c: The required level of capital investment?	7.8	8.3	+0.5	+2.3
Q4d: The cost required in your dealership to meet franchised standards?	7.6	8.5	+0.9	+2.6
Q4e: The return on capital for your dealership?	6.6	7.8	+1.2	+1.9
Q4f: The quality of guidance provided by your manufacturer to your dealership?	7.6	8.3	+0.7	+2.2
Q4g: The financial support available to your dealership from your manufacturer?	6.6	7.8	+1.2	+2.2

Question 5 - New car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	7.2	8.2	+1.0	+2.0
Q5b: Your new car targeting process?	7.2	7.9	+0.7	+1.9
Q5c: Your total margin on new vehicles?	7.0	7.3	+0.3	+1.3
Q5d: Your current bonus and rebate rates on new car sales?	6.9	7.3	+0.4	+1.4
Q5e: Manufacturer inducement to self register vehicles?	7.7	8.0	+0.3	+1.8
Q5f: Manufacturer's new vehicle supply?	4.5	6.5	+2.0	+1.0
Q5g: The fairness of your manufacturer's new car ordering and stocking policies?	7.0	7.8	+0.8	+1.7
Q5h: The fairness of your manufacturer's demonstrator programme?	7.3	8.1	+0.8	+1.7

Question 6 - Used car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	8.0	8.4	+0.4	+1.3
Q6b: The targets set by your manufacturer for used cars?	8.3	8.6	+0.3	+1.9
Q6c: The cost and quality of your manufacturer's used car warranties?	8.0	8.5	+0.5	+1.9
Q6d: Your total margin on used car sales?	7.8	8.4	+0.6	+1.3
Q6e: Your manufacturer's used car programme?	7.6	8.3	+0.7	+1.5
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	8.1	7.9	-0.2	+1.3

Question 7 - Aftersales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	7.8	8.2	+0.4	+1.7
Q7b: Quality of technical support?	7.9	8.2	+0.3	+1.9
Q7c: Availability of parts?	7.7	8.2	+0.5	+2.4
Q7d: Price of manufacturer parts compared with parts factors?	7.0	7.4	+0.4	+1.7
Q7e: Service profitability earnings?	7.2	7.8	+0.6	+1.4
Q7f: Manufacturer service plan rates and recovery?	6.9	7.5	+0.6	+1.2
Q7g: The fairness of your manufacturer's warranty policy for you and your cust...	8.5	8.8	+0.3	+2.2
Q7h: Your manufacturer's stocking policy for parts/accessories?	7.8	8.2	+0.4	+1.5

### Question 8 - Finance

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	7.1	7.4	+0.3	+1.0
Q8b: The reasonableness of the finance targets set by your manufacturer?	7.8	8.0	+0.2	+1.2
Q8c: The earnings potential of your manufacturer's finance programme?	6.1	6.0	-0.1	+0.0
Q8d: The support you receive from your manufacturer's finance house?	7.7	7.8	+0.1	+1.3

### Question 9 - Dealer/Manufacturer relationships

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	8.1	8.7	+0.6	+2.2
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	7.8	8.6	+0.8	+2.5
Q9c: Your manufacturer's dealer council/franchise board?			-	
Q9d: Your manufacturer's response to your communications with them?	8.0	8.8	+0.8	+2.4
Q9e: Your manufacturer dealer standards are fair and reasonable?	8.4	8.9	+0.5	+2.3
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	7.9	8.4	+0.5	+2.2
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	8.2	8.8	+0.6	+2.4
Q9h: The value of manufacturer field staff to your business?	7.0	8.5	+1.5	+2.1
Q9i: The quality of your manufacturer's training?	7.7	8.4	+0.7	+1.5
Q9j: The cost of manufacturer's training?	8.0	8.4	+0.4	+2.1
Q9k: Your manufacturer's apprenticeship programme?	7.9	8.3	+0.4	+1.3
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	8.6	8.6	0.0	+2.6

### Question 10 - Product and marketing

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q10a: Frequency of introduction of new models?	5.0	5.6	+0.6	-1.0
Q10b: Product value and pricing?	7.2	7.7	+0.5	+1.2
Q10c: Product advertising?	6.8	7.5	+0.7	+1.0

### Question 11 - Electric vehicle/Plug-in vehicles

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q11a: Battery Electric Vehicle products your manufacturer currently offers?	4.9	4.9	0.0	-1.0
Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	4.9	6.4	+1.5	-0.3
Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	5.6	6.1	+0.5	-0.2
Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	5.3	6.0	+0.7	+0.7
Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	6.0	6.4	+0.4	+1.2
Q11f: With your manufacturer's support with on-site EV charging infrastructure?		4.8	-	-0.1

### Question 12 & 13 - Overall Rating

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	7.7	8.4	+0.7	+2.1
Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	7.4	8.5	+1.1	+2.1

## Overall Manufacturer Rating

Q12: How would you rate your manufacturer overall on a scale of 1 to 10?

Winter 2022

8.1

Summer 2023

7.3

Ranking vs. Winter 22  
11 vs. 7

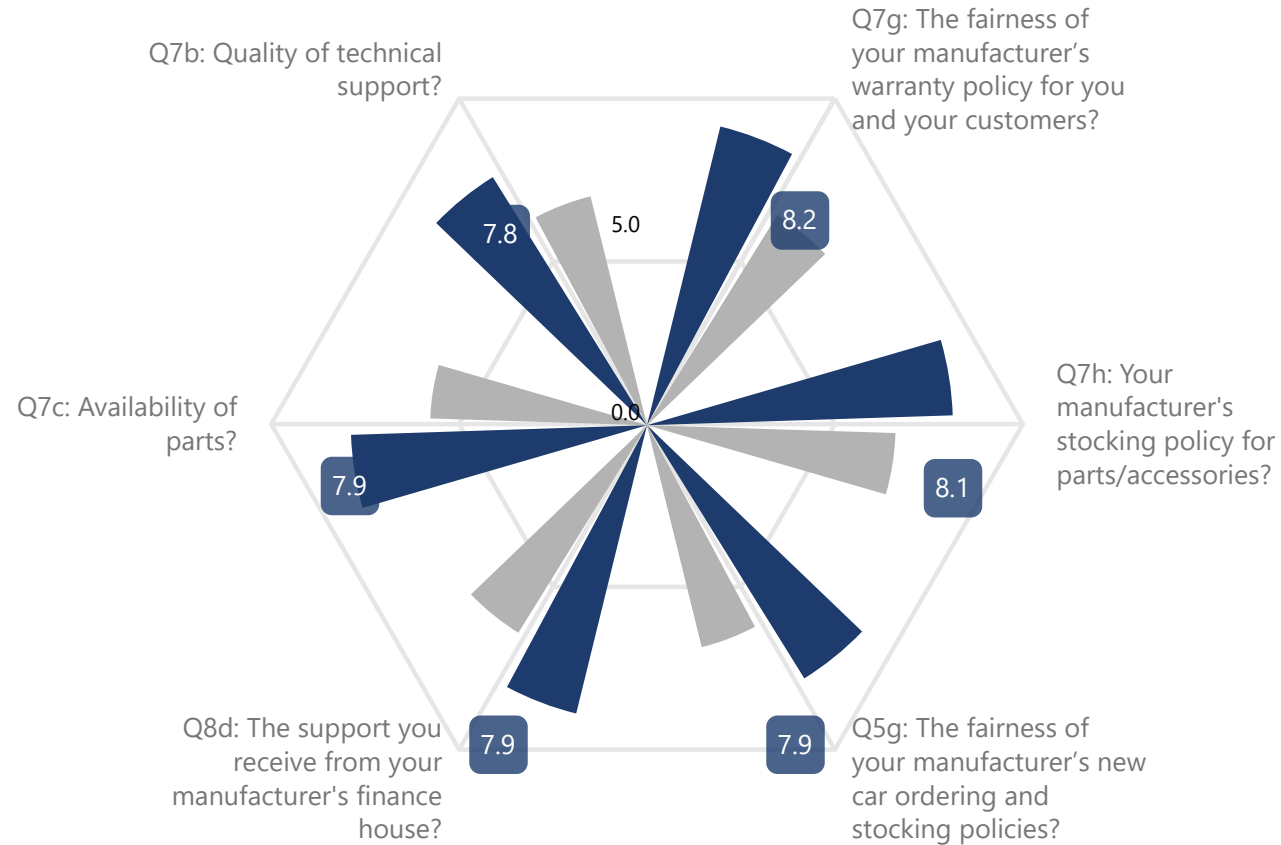
% Change  
**-9.9%**

Score Change  
**-0.8 pts**



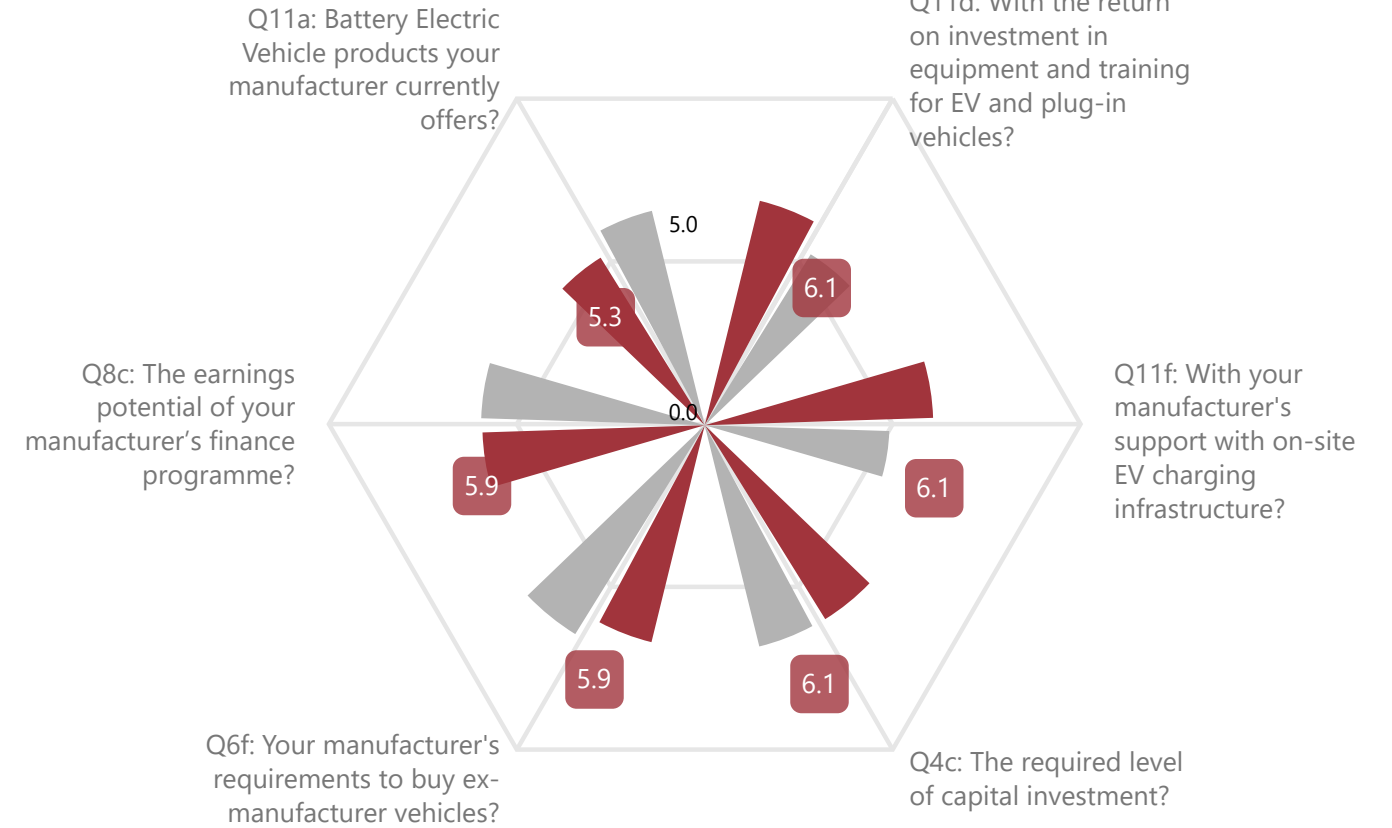
### Top 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



### Bottom 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



Question 4 - Value of the franchise	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	8.4	7.0	-1.4	+0.8
Q4b: The future profit return from representing your franchise?	7.4	6.9	-0.5	+1.1
Q4c: The required level of capital investment?	6.6	6.1	-0.5	+0.0
Q4d: The cost required in your dealership to meet franchised standards?	6.6	6.4	-0.2	+0.4
Q4e: The return on capital for your dealership?	7.4	6.8	-0.6	+0.8
Q4f: The quality of guidance provided by your manufacturer to your dealership?	7.7	7.4	-0.3	+1.3
Q4g: The financial support available to your dealership from your manufacturer?	7.7	7.4	-0.3	+1.8

Question 5 - New car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	7.1	6.9	-0.2	+0.7
Q5b: Your new car targeting process?	6.8	6.6	-0.2	+0.6
Q5c: Your total margin on new vehicles?	8.0	6.9	-1.1	+0.8
Q5d: Your current bonus and rebate rates on new car sales?	7.2	6.9	-0.3	+0.9
Q5e: Manufacturer inducement to self register vehicles?	7.8	7.4	-0.4	+1.2
Q5f: Manufacturer's new vehicle supply?	6.7	7.1	+0.4	+1.6
Q5g: The fairness of your manufacturer's new car ordering and stocking policies?	7.9	7.9	0.0	+1.8
Q5h: The fairness of your manufacturer's demonstrator programme?	8.2	7.4	-0.8	+1.0

Question 6 - Used car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	8.1	7.5	-0.6	+0.4
Q6b: The targets set by your manufacturer for used cars?	6.7	7.0	+0.3	+0.3
Q6c: The cost and quality of your manufacturer's used car warranties?	7.8	7.2	-0.6	+0.5
Q6d: Your total margin on used car sales?	8.4	7.7	-0.7	+0.7
Q6e: Your manufacturer's used car programme?	7.8	7.2	-0.6	+0.4
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	6.5	5.9	-0.6	-0.6

Question 7 - Aftersales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	7.3	7.4	+0.1	+0.9
Q7b: Quality of technical support?	8.1	7.8	-0.3	+1.5
Q7c: Availability of parts?	8.2	7.9	-0.3	+2.1
Q7d: Price of manufacturer parts compared with parts factors?	7.7	7.3	-0.4	+1.6
Q7e: Service profitability earnings?	7.3	7.0	-0.3	+0.6
Q7f: Manufacturer service plan rates and recovery?	6.8	7.4	+0.6	+1.0
Q7g: The fairness of your manufacturer's warranty policy for you and your cust...	8.3	8.2	-0.1	+1.6
Q7h: Your manufacturer's stocking policy for parts/accessories?	8.4	8.1	-0.3	+1.5



### Question 8 - Finance

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	7.7	7.7	0.0	+1.2
Q8b: The reasonableness of the finance targets set by your manufacturer?	7.8	7.7	-0.1	+1.0
Q8c: The earnings potential of your manufacturer's finance programme?	5.6	5.9	+0.3	-0.0
Q8d: The support you receive from your manufacturer's finance house?	8.0	7.9	-0.1	+1.4

### Question 9 - Dealer/Manufacturer relationships

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	8.2	7.3	-0.9	+0.8
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	7.7	7.1	-0.6	+1.0
Q9c: Your manufacturer's dealer council/franchise board?	7.5	7.1	-0.4	+0.4
Q9d: Your manufacturer's response to your communications with them?	8.0	7.4	-0.6	+1.0
Q9e: Your manufacturer dealer standards are fair and reasonable?	7.3	7.2	-0.1	+0.7
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	7.8	7.6	-0.2	+1.5
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	7.7	6.8	-0.9	+0.5
Q9h: The value of manufacturer field staff to your business?	7.8	7.2	-0.6	+0.8
Q9i: The quality of your manufacturer's training?	8.5	7.7	-0.8	+0.9
Q9j: The cost of manufacturer's training?	7.7	7.1	-0.6	+0.8
Q9k: Your manufacturer's apprenticeship programme?	8.6	7.6	-1.0	+0.6
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	8.5	7.4	-1.1	+1.4

### Question 10 - Product and marketing

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q10a: Frequency of introduction of new models?	8.0	7.4	-0.6	+0.8
Q10b: Product value and pricing?	8.3	7.4	-0.9	+0.9
Q10c: Product advertising?	7.9	7.3	-0.6	+0.9

### Question 11 - Electric vehicle/Plug-in vehicles

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q11a: Battery Electric Vehicle products your manufacturer currently offers?	5.2	5.3	+0.1	-0.6
Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	7.0	6.2	-0.8	-0.4
Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	7.9	7.0	-0.9	+0.6
Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	7.1	6.1	-1.0	+0.8
Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	7.4	6.5	-0.9	+1.3
Q11f: With your manufacturer's support with on-site EV charging infrastructure?		6.1	-	+1.2

### Question 12 & 13 - Overall Rating

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	8.1	7.3	-0.8	+1.0
Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	8.3	7.7	-0.6	+1.3

## Overall Manufacturer Rating

Q12: How would you rate your manufacturer overall on a scale of 1 to 10?

Winter 2022

3.7

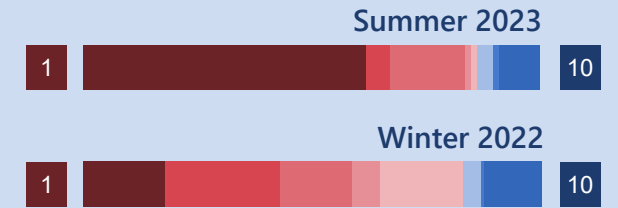
Summer 2023

2.4

Ranking vs. Winter 22  
30 vs. 31

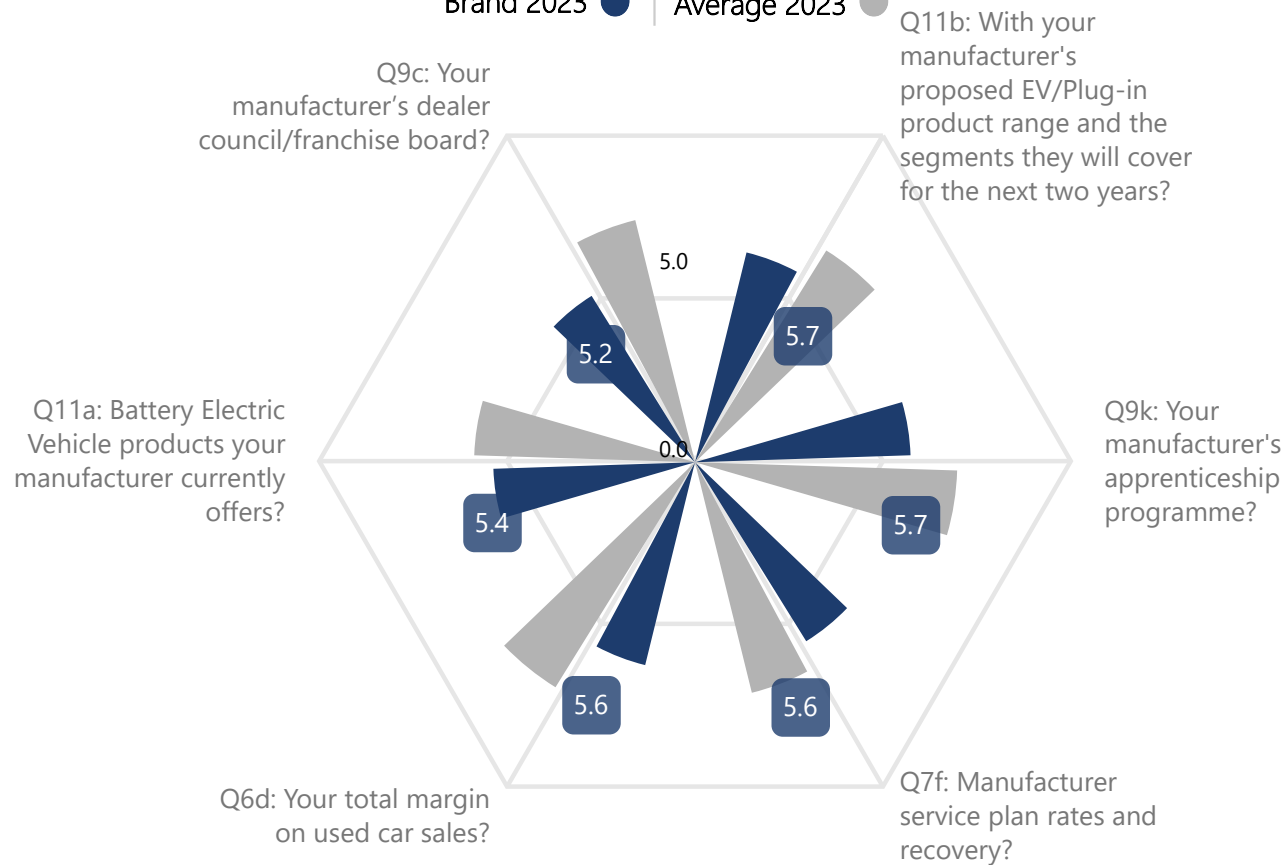
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Score Change  
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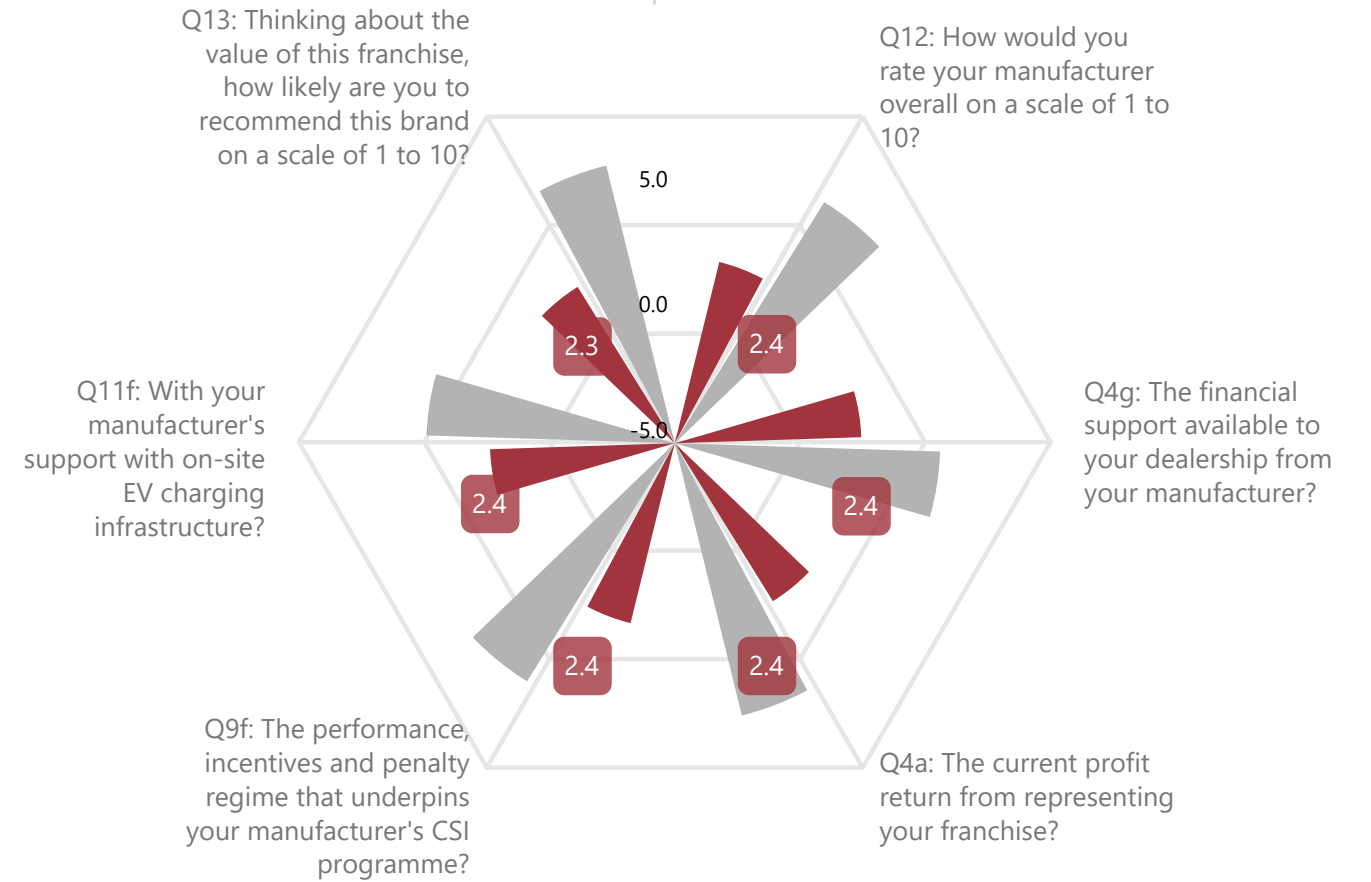
## Top 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



## Bottom 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



Question 4 - Value of the franchise	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	3.3	2.4	-0.9	-3.8
Q4b: The future profit return from representing your franchise?	3.6	2.6	-1.0	-3.1
Q4c: The required level of capital investment?	4.5	4.0	-0.5	-2.1
Q4d: The cost required in your dealership to meet franchised standards?	3.9	4.1	+0.2	-1.9
Q4e: The return on capital for your dealership?	3.4	2.5	-0.9	-3.4
Q4f: The quality of guidance provided by your manufacturer to your dealership?	3.7	2.5	-1.2	-3.6
Q4g: The financial support available to your dealership from your manufacturer?	3.2	2.4	-0.8	-3.1

Question 5 - New car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	4.4	4.7	+0.3	-1.4
Q5b: Your new car targeting process?	4.7	3.4	-1.3	-2.6
Q5c: Your total margin on new vehicles?	4.8	4.4	-0.4	-1.7
Q5d: Your current bonus and rebate rates on new car sales?	4.2	3.7	-0.5	-2.3
Q5e: Manufacturer inducement to self register vehicles?	5.4	3.7	-1.7	-2.5
Q5f: Manufacturer's new vehicle supply?	3.3	4.3	+1.0	-1.3
Q5g: The fairness of your manufacturer's new car ordering and stocking policies?	4.1	3.5	-0.6	-2.5
Q5h: The fairness of your manufacturer's demonstrator programme?	4.5	4.1	-0.4	-2.3

Question 6 - Used car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	4.5	4.7	+0.2	-2.4
Q6b: The targets set by your manufacturer for used cars?	4.6	4.1	-0.5	-2.6
Q6c: The cost and quality of your manufacturer's used car warranties?	4.1	4.2	+0.1	-2.5
Q6d: Your total margin on used car sales?	6.4	5.6	-0.8	-1.5
Q6e: Your manufacturer's used car programme?	4.6	4.1	-0.5	-2.7
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	5.4	4.6	-0.8	-1.9

Question 7 - Aftersales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	5.1	3.8	-1.3	-2.7
Q7b: Quality of technical support?	4.1	3.3	-0.8	-2.9
Q7c: Availability of parts?	3.0	3.5	+0.5	-2.3
Q7d: Price of manufacturer parts compared with parts factors?	4.4	4.2	-0.2	-1.6
Q7e: Service profitability earnings?	4.9	5.1	+0.2	-1.4
Q7f: Manufacturer service plan rates and recovery?	5.5	5.6	+0.1	-0.7
Q7g: The fairness of your manufacturer's warranty policy for you and your cust...	4.6	4.2	-0.4	-2.4
Q7h: Your manufacturer's stocking policy for parts/accessories?	5.8	4.4	-1.4	-2.2

### Question 8 - Finance

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	5.0	4.1	-0.9	-2.4
Q8b: The reasonableness of the finance targets set by your manufacturer?	5.3	4.8	-0.5	-2.0
Q8c: The earnings potential of your manufacturer's finance programme?	4.6	4.7	+0.1	-1.2
Q8d: The support you receive from your manufacturer's finance house?	5.7	5.1	-0.6	-1.4

### Question 9 - Dealer/Manufacturer relationships

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	3.9	2.8	-1.1	-3.8
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	3.7	2.6	-1.1	-3.5
Q9c: Your manufacturer's dealer council/franchise board?	6.2	5.2	-1.0	-1.4
Q9d: Your manufacturer's response to your communications with them?	4.1	3.2	-0.9	-3.2
Q9e: Your manufacturer dealer standards are fair and reasonable?	4.9	3.0	-1.9	-3.5
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	3.5	2.4	-1.1	-3.8
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	4.0	2.7	-1.3	-3.6
Q9h: The value of manufacturer field staff to your business?	5.0	3.1	-1.9	-3.3
Q9i: The quality of your manufacturer's training?	6.2	4.3	-1.9	-2.5
Q9j: The cost of manufacturer's training?	5.6	4.1	-1.5	-2.2
Q9k: Your manufacturer's apprenticeship programme?	6.1	5.7	-0.4	-1.2
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	3.7	2.6	-1.1	-3.4

### Question 10 - Product and marketing

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q10a: Frequency of introduction of new models?	6.0	5.0	-1.0	-1.6
Q10b: Product value and pricing?	4.1	3.6	-0.5	-2.9
Q10c: Product advertising?	4.7	4.2	-0.5	-2.2

### Question 11 - Electric vehicle/Plug-in vehicles

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q11a: Battery Electric Vehicle products your manufacturer currently offers?	6.0	5.4	-0.6	-0.5
Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	6.4	5.7	-0.7	-0.9
Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	6.3	4.7	-1.6	-1.6
Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	4.9	3.2	-1.7	-2.2
Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	5.3	3.0	-2.3	-2.2
Q11f: With your manufacturer's support with on-site EV charging infrastructure?		2.4	-	-2.5

### Question 12 & 13 - Overall Rating

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	3.7	2.4	-1.3	-3.9
Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	3.6	2.3	-1.3	-4.1

## Overall Manufacturer Rating

Q12: How would you rate your manufacturer overall on a scale of 1 to 10?

Winter 2022

6.0

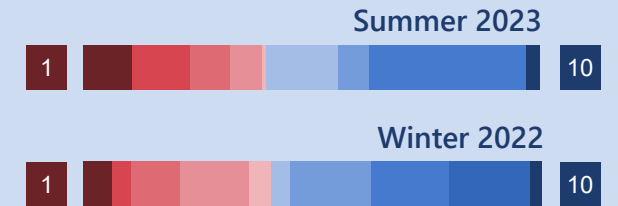
Summer 2023

5.4

Ranking vs. Winter 22  
21 vs. 19

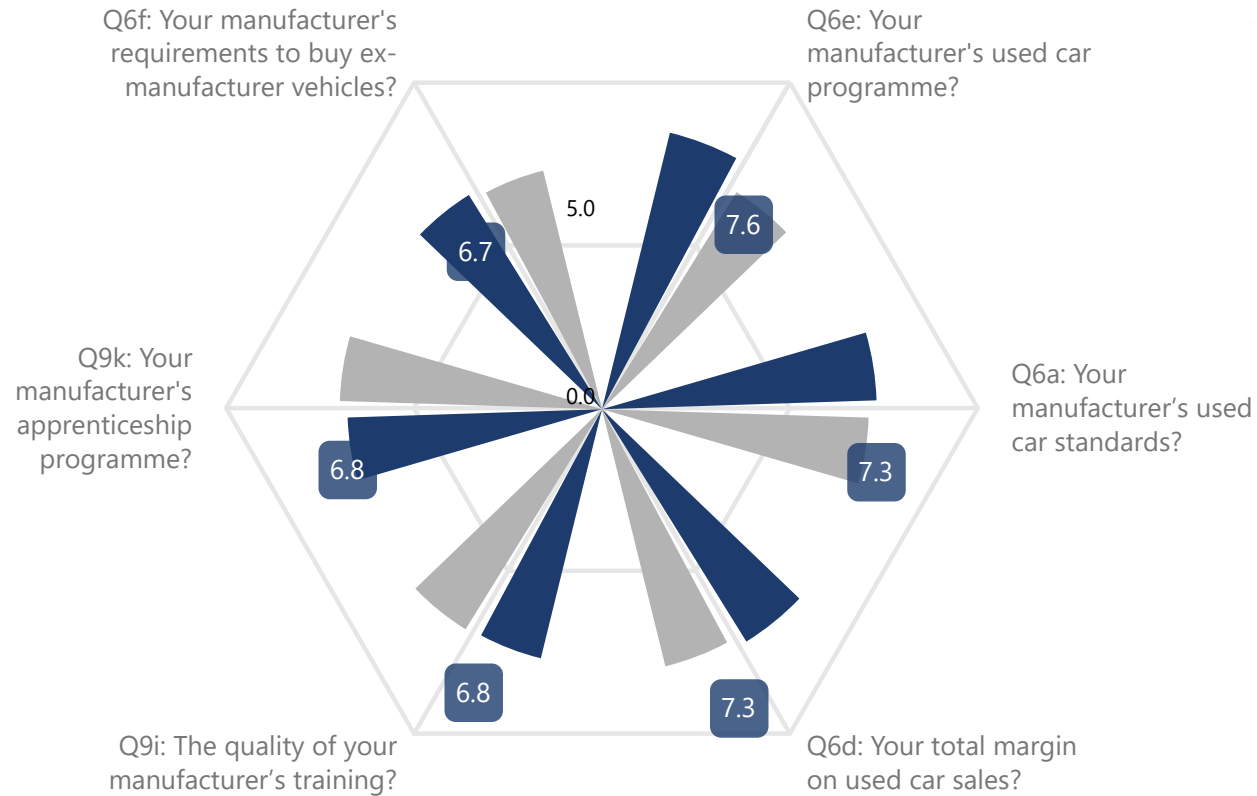
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Score Change  
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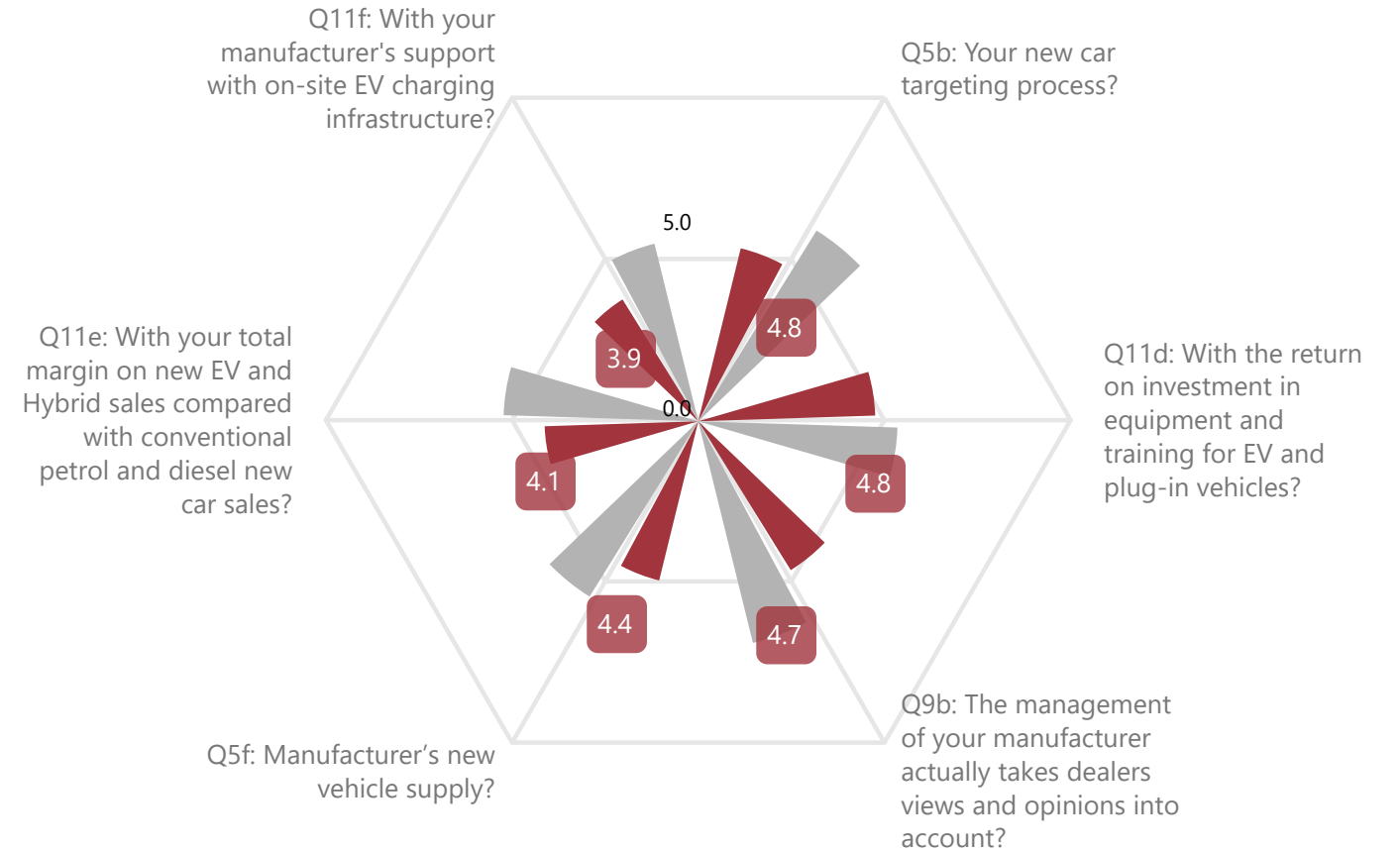
## Top 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



## Bottom 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



Question 4 - Value of the franchise	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	8.0	6.6	-1.4	+0.4
Q4b: The future profit return from representing your franchise?	5.5	5.4	-0.1	-0.4
Q4c: The required level of capital investment?	6.5	5.6	-0.9	-0.4
Q4d: The cost required in your dealership to meet franchised standards?	6.5	5.7	-0.8	-0.3
Q4e: The return on capital for your dealership?	6.8	6.0	-0.8	+0.1
Q4f: The quality of guidance provided by your manufacturer to your dealership?	5.8	5.1	-0.7	-1.0
Q4g: The financial support available to your dealership from your manufacturer?	5.0	4.9	-0.1	-0.7

Question 5 - New car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	6.2	5.4	-0.8	-0.7
Q5b: Your new car targeting process?	5.3	4.8	-0.5	-1.2
Q5c: Your total margin on new vehicles?	6.3	6.0	-0.3	-0.0
Q5d: Your current bonus and rebate rates on new car sales?	6.2	6.2	0.0	+0.2
Q5e: Manufacturer inducement to self register vehicles?	5.2	4.9	-0.3	-1.3
Q5f: Manufacturer's new vehicle supply?	4.1	4.4	+0.3	-1.1
Q5g: The fairness of your manufacturer's new car ordering and stocking policies?	6.0	5.7	-0.3	-0.3
Q5h: The fairness of your manufacturer's demonstrator programme?	6.3	5.8	-0.5	-0.6

Question 6 - Used car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	7.6	7.3	-0.3	+0.2
Q6b: The targets set by your manufacturer for used cars?	5.6	6.3	+0.7	-0.5
Q6c: The cost and quality of your manufacturer's used car warranties?	6.6	6.6	0.0	-0.0
Q6d: Your total margin on used car sales?	7.9	7.3	-0.6	+0.2
Q6e: Your manufacturer's used car programme?	7.4	7.6	+0.2	+0.8
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	6.6	6.7	+0.1	+0.2

Question 7 - Aftersales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	6.0	5.9	-0.1	-0.6
Q7b: Quality of technical support?	5.2	5.5	+0.3	-0.8
Q7c: Availability of parts?	4.9	4.9	0.0	-0.9
Q7d: Price of manufacturer parts compared with parts factors?	5.0	5.2	+0.2	-0.6
Q7e: Service profitability earnings?	5.7	5.9	+0.2	-0.5
Q7f: Manufacturer service plan rates and recovery?	5.6	5.2	-0.4	-1.1
Q7g: The fairness of your manufacturer's warranty policy for you and your cust...	5.5	5.8	+0.3	-0.8
Q7h: Your manufacturer's stocking policy for parts/accessories?	6.5	6.4	-0.1	-0.2

### Question 8 - Finance

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	5.7	6.2	+0.5	-0.3
Q8b: The reasonableness of the finance targets set by your manufacturer?	6.4	6.0	-0.4	-0.7
Q8c: The earnings potential of your manufacturer's finance programme?	5.8	5.9	+0.1	-0.0
Q8d: The support you receive from your manufacturer's finance house?	4.9	5.7	+0.8	-0.8

### Question 9 - Dealer/Manufacturer relationships

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	6.0	5.3	-0.7	-1.2
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	5.1	4.7	-0.4	-1.4
Q9c: Your manufacturer's dealer council/franchise board?	6.6	5.9	-0.7	-0.7
Q9d: Your manufacturer's response to your communications with them?	5.7	5.0	-0.7	-1.3
Q9e: Your manufacturer dealer standards are fair and reasonable?	6.2	5.6	-0.6	-1.0
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	5.0	5.0	0.0	-1.2
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	5.4	5.4	0.0	-0.9
Q9h: The value of manufacturer field staff to your business?	5.9	5.2	-0.7	-1.2
Q9i: The quality of your manufacturer's training?	6.8	6.8	0.0	-0.1
Q9j: The cost of manufacturer's training?	6.3	5.9	-0.4	-0.4
Q9k: Your manufacturer's apprenticeship programme?	6.7	6.8	+0.1	-0.2
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	4.8	5.1	+0.3	-0.9

### Question 10 - Product and marketing

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q10a: Frequency of introduction of new models?	7.1	6.7	-0.4	+0.0
Q10b: Product value and pricing?	6.7	5.7	-1.0	-0.8
Q10c: Product advertising?	6.8	6.3	-0.5	-0.1

### Question 11 - Electric vehicle/Plug-in vehicles

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q11a: Battery Electric Vehicle products your manufacturer currently offers?	6.3	5.4	-0.9	-0.5
Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	6.7	6.0	-0.7	-0.7
Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	6.8	5.7	-1.1	-0.6
Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	5.5	4.8	-0.7	-0.6
Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	5.0	4.1	-0.9	-1.1
Q11f: With your manufacturer's support with on-site EV charging infrastructure?		3.9	-	-1.1

### Question 12 & 13 - Overall Rating

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	6.0	5.4	-0.6	-0.9
Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	6.1	6.0	-0.1	-0.4

## Overall Manufacturer Rating

Q12: How would you rate your manufacturer overall on a scale of 1 to 10?

Winter 2022

7.0

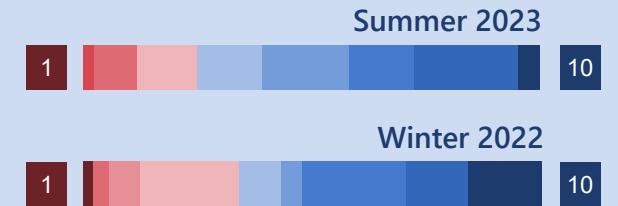
Summer 2023

6.8

Ranking vs. Winter 22  
14 vs. 15

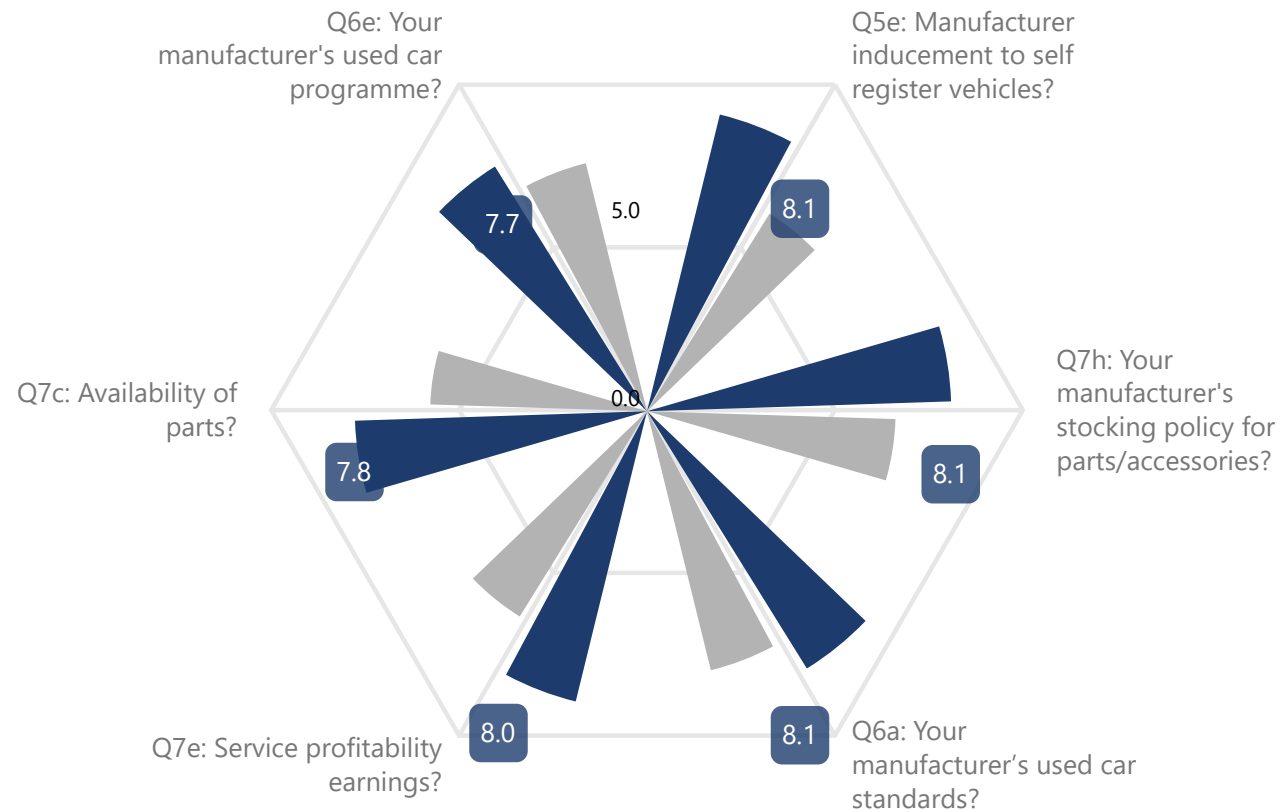
% Change  
-2.9%

Score Change  
-0.2 pts



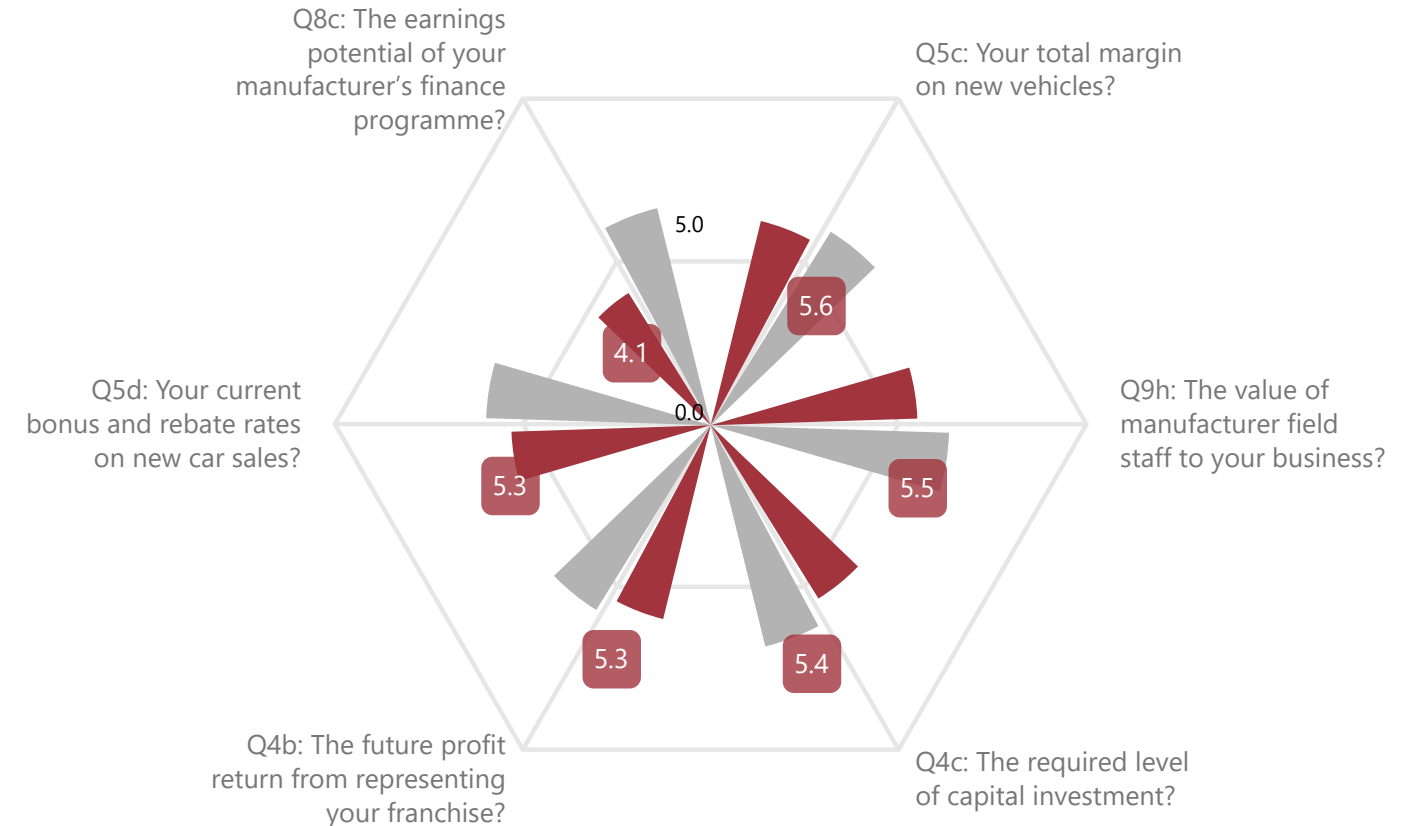
## Top 6 Questions vs Average

Brand 2023 ● | Average 2023 ●



## Bottom 6 Questions vs Average

Brand 2023 ● | Average 2023 ●





Question 4 - Value of the franchise	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	7.2	6.8	-0.4	+0.6
Q4b: The future profit return from representing your franchise?	5.7	5.3	-0.4	-0.5
Q4c: The required level of capital investment?	5.7	5.4	-0.3	-0.6
Q4d: The cost required in your dealership to meet franchised standards?	5.7	5.9	+0.2	-0.1
Q4e: The return on capital for your dealership?	6.7	6.0	-0.7	+0.1
Q4f: The quality of guidance provided by your manufacturer to your dealership?	6.4	5.6	-0.8	-0.4
Q4g: The financial support available to your dealership from your manufacturer?	6.1	5.9	-0.2	+0.3

Question 5 - New car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	6.7	6.9	+0.2	+0.8
Q5b: Your new car targeting process?	6.3	7.1	+0.8	+1.1
Q5c: Your total margin on new vehicles?	6.9	5.6	-1.3	-0.5
Q5d: Your current bonus and rebate rates on new car sales?	7.0	5.3	-1.7	-0.7
Q5e: Manufacturer inducement to self register vehicles?	7.6	8.1	+0.5	+1.9
Q5f: Manufacturer's new vehicle supply?	3.7	5.8	+2.1	+0.3
Q5g: The fairness of your manufacturer's new car ordering and stocking policies?	6.3	6.9	+0.6	+0.8
Q5h: The fairness of your manufacturer's demonstrator programme?	7.5	7.1	-0.4	+0.7

Question 6 - Used car sales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	8.1	8.1	0.0	+1.0
Q6b: The targets set by your manufacturer for used cars?	6.4	7.3	+0.9	+0.6
Q6c: The cost and quality of your manufacturer's used car warranties?	6.9	7.4	+0.5	+0.8
Q6d: Your total margin on used car sales?	7.5	7.4	-0.1	+0.3
Q6e: Your manufacturer's used car programme?	7.7	7.7	0.0	+0.9
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	7.0	7.2	+0.2	+0.7

Question 7 - Aftersales	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	6.1	6.9	+0.8	+0.4
Q7b: Quality of technical support?	7.0	7.4	+0.4	+1.2
Q7c: Availability of parts?	7.5	7.8	+0.3	+2.0
Q7d: Price of manufacturer parts compared with parts factors?	6.3	6.8	+0.5	+1.0
Q7e: Service profitability earnings?	7.2	8.0	+0.8	+1.5
Q7f: Manufacturer service plan rates and recovery?	6.1	6.9	+0.8	+0.6
Q7g: The fairness of your manufacturer's warranty policy for you and your cust...	7.5	7.6	+0.1	+1.0
Q7h: Your manufacturer's stocking policy for parts/accessories?	7.6	8.1	+0.5	+1.5

**Question 8 - Finance**

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	5.6	6.0	+0.4	-0.4
Q8b: The reasonableness of the finance targets set by your manufacturer?	6.7	6.9	+0.2	+0.2
Q8c: The earnings potential of your manufacturer's finance programme?	4.8	4.1	-0.7	-1.8
Q8d: The support you receive from your manufacturer's finance house?	6.7	6.2	-0.5	-0.3

**Question 9 - Dealer/Manufacturer relationships**

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	7.4	7.1	-0.3	+0.6
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	7.1	6.5	-0.6	+0.4
Q9c: Your manufacturer's dealer council/franchise board?	7.6	6.3	-1.3	-0.3
Q9d: Your manufacturer's response to your communications with them?	7.4	7.0	-0.4	+0.6
Q9e: Your manufacturer dealer standards are fair and reasonable?	7.8	7.4	-0.4	+0.8
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	7.8	7.3	-0.5	+1.1
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	7.7	7.1	-0.6	+0.8
Q9h: The value of manufacturer field staff to your business?	7.6	5.5	-2.1	-0.8
Q9i: The quality of your manufacturer's training?	7.3	6.9	-0.4	+0.0
Q9j: The cost of manufacturer's training?	6.8	6.6	-0.2	+0.3
Q9k: Your manufacturer's apprenticeship programme?	8.0	7.6	-0.4	+0.7
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	5.8	5.9	+0.1	-0.1

**Question 10 - Product and marketing**

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q10a: Frequency of introduction of new models?	5.6	6.3	+0.7	-0.3
Q10b: Product value and pricing?	6.1	6.9	+0.8	+0.4
Q10c: Product advertising?	6.6	6.2	-0.4	-0.2

**Question 11 - Electric vehicle/Plug-in vehicles**

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q11a: Battery Electric Vehicle products your manufacturer currently offers?	6.2	6.6	+0.4	+0.7
Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	7.0	7.6	+0.6	+1.0
Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	7.0	7.1	+0.1	+0.7
Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	6.0	6.1	+0.1	+0.8
Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	6.0	6.3	+0.3	+1.1
Q11f: With your manufacturer's support with on-site EV charging infrastructure?		6.2	-	+1.3

**Question 12 & 13 - Overall Rating**

	Score (W22)	Score (S23)	+/- (pts)	vs. Avg.
Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	7.0	6.8	-0.2	+0.5
Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	7.1	6.8	-0.3	+0.4

# National Franchised Dealers Association Dealer Attitude Survey Summer 2023 Edition



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