



# National Franchised Dealers Association

## Winter Dealer Attitude Survey 2022/23



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## Introduction

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Dear Colleague,

Welcome to the latest **NFDA Dealer Attitude Survey**.

The National Franchised Dealers Association (NFDA), which represents franchised car and commercial vehicle retailers in the UK, has been conducting the Dealer Attitude Survey (DAS) uninterrupted since 1989.

The Winter 2022/23 edition of the survey attracted a record response rate of 70% with a total of 2,647 responses from 32 participating manufacturer networks.

The DAS takes place twice a year and this edition was conducted in January/February of 2023. The survey asked franchised dealers questions covering business issues that are key to a successful working relationship with their respective manufacturers. Responses are scored from 1 (extremely dissatisfied) to 10 (extremely satisfied).

Despite the challenges faced by OEMs and retailers alike, primarily due to supply constraints, wider economic turbulence and other post-pandemic, post Brexit related issues, the latest findings of the Dealer Attitude Survey show a positive picture with marked improvements for most brands across several areas.

In particular, franchised dealers' ratings revealed high levels of satisfaction from their current margins on used cars and the quality of manufacturers' training. Highest positive movement was seen in costs of manufacturer's training (+0.4) and satisfaction levels of battery electric vehicle (BEV) products currently on offer (+0.4).

The all-important question 'how would you rate your manufacturer overall on a scale of 1 to 10?' returned an average of 6.5 points out of 10, falling 0.1 from the survey six months ago.

The winners of the Winter 2022/23 Dealer Attitude Survey, reporting the highest average scores across all questions, was Lexus at 8.8. With special mention to Hyundai for most improved manufacturer scoring 106.6 points higher than the last edition.

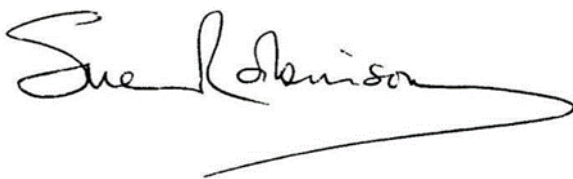
This report is a summary of the results from the NFDA Dealer Attitude Survey Winter 2022/23, it gives an overview of the findings through the charts and the analysis of the main questions.

A full version of the report is attached and also available on request.

The survey was analysed by the National Franchised Dealers Association (NFDA). For further information and comments, please email [nfda@rmif.co.uk](mailto:nfda@rmif.co.uk).

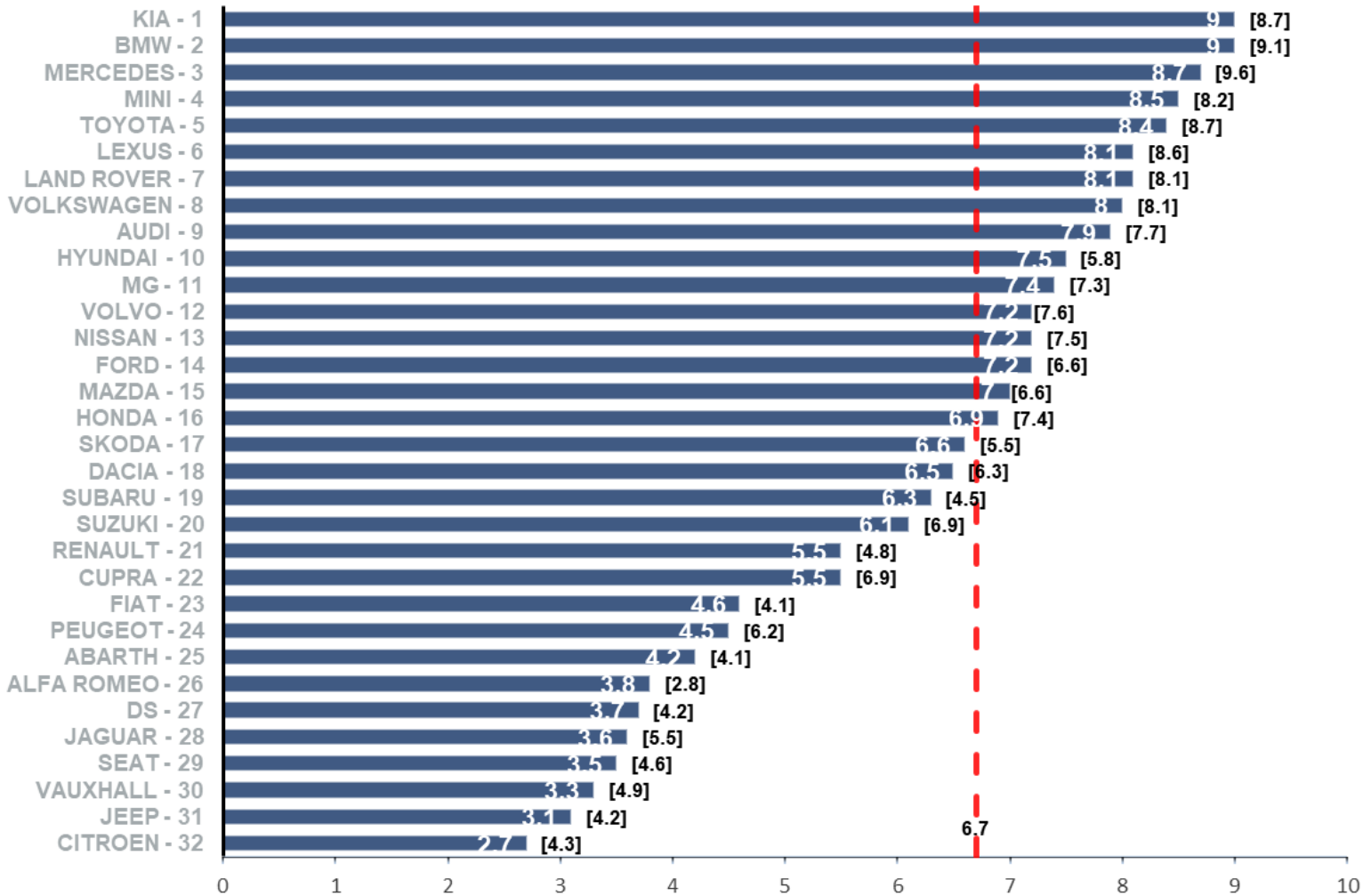
**Sue Robinson**

Chief Executive, National Franchised Dealers Association



## Profit Return

### 1. How satisfied are you with the current profit return from representing your business?



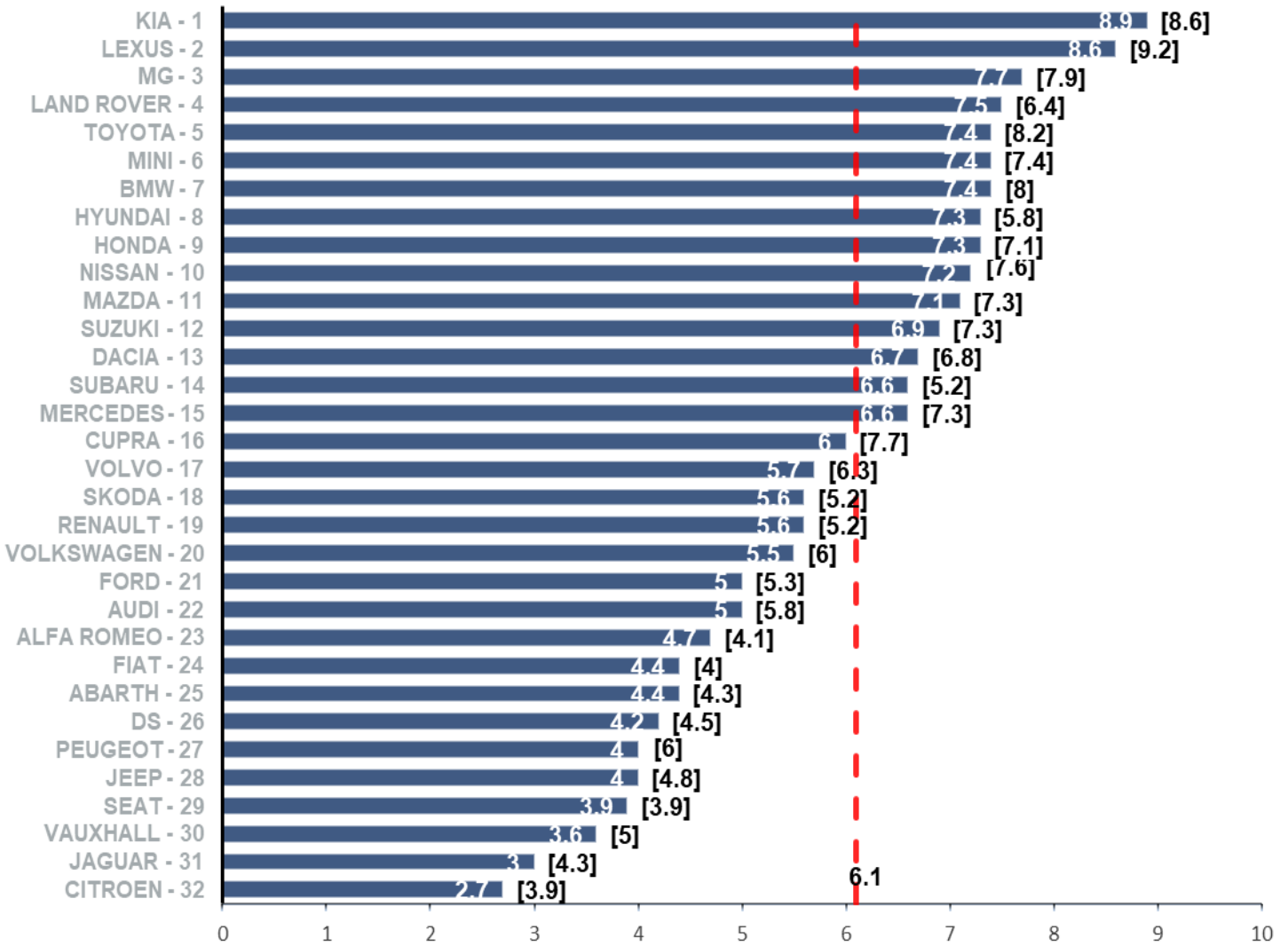
Figures in white = Winter 2022/2023

Figures in black = Summer 2022

<b>Biggest improvement:</b>	<b>Subaru</b>	<b>+1.8</b>
<b>Largest decline:</b>	<b>Jaguar</b>	<b>-1.9</b>
<b>Average score:</b>		6.7
<b>Previous average:</b>		6.4
<b>Change</b>		<b>+0.3</b>
<b>Networks improved:</b>		44%
<b>Networks decreased:</b>		53%
<b>Stayed the same:</b>		3%
<b>Networks scored above 5:</b>		69%

## Profit Return

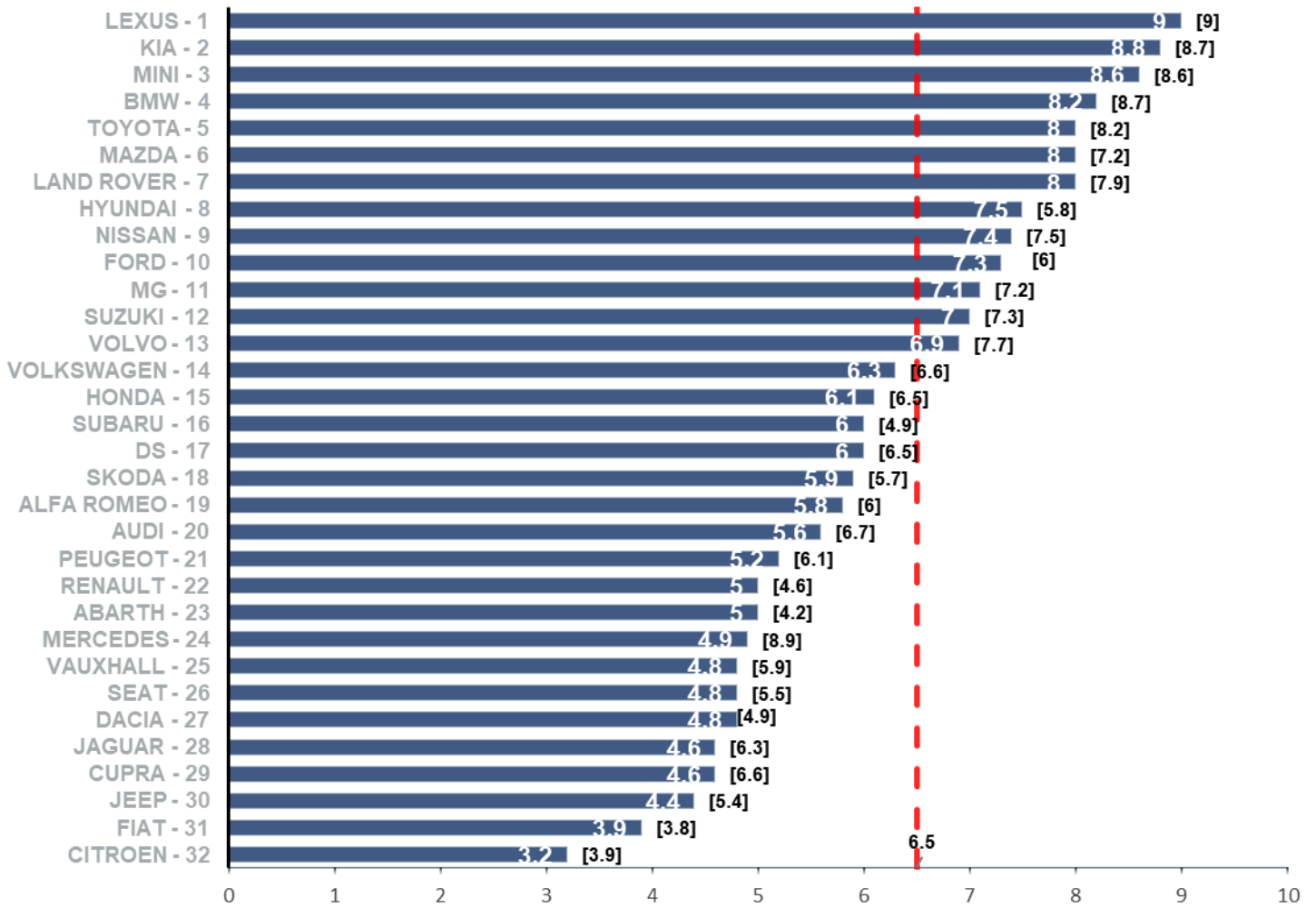
### 2. How satisfied are you with the future profit return from representing your business?



<b>Biggest improvement:</b>	Hyundai	+1.5
<b>Largest decline:</b>	Peugeot	-2
<b>Average score:</b>		6.1
<b>Previous average:</b>		6.1
<b>Change</b>		0
<b>Networks improved:</b>		31%
<b>Networks decreased:</b>		63%
<b>Stayed the same:</b>		6%
<b>Networks scored above 5:</b>		63%

## Profit Return

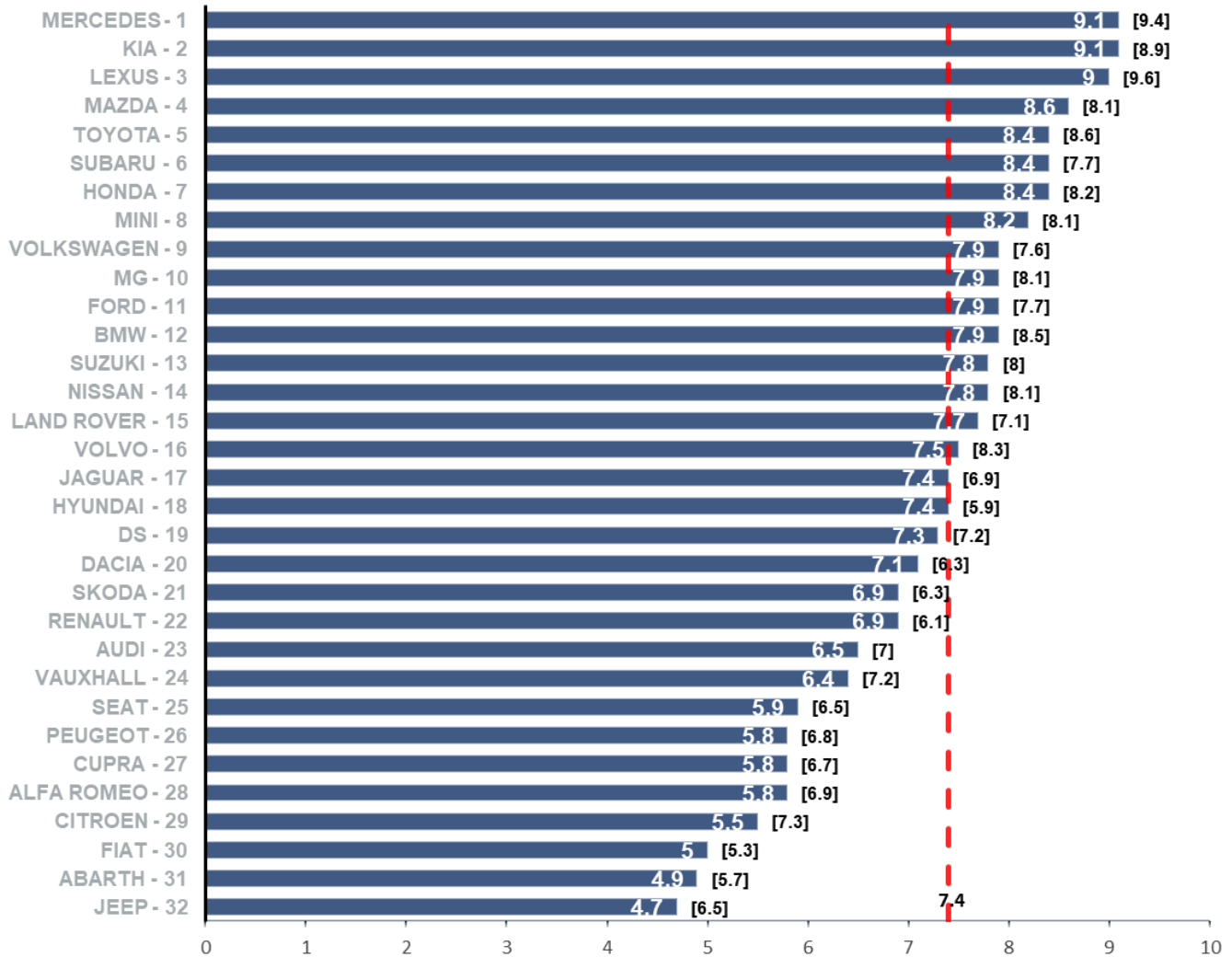
### 3. How satisfied are you with your total margin on new vehicles?



<b>Biggest improvement:</b>	<b>Hyundai</b>	<b>+1.7</b>
<b>Largest decline:</b>	<b>Mercedes</b>	<b>- 4</b>
<b>Average score:</b>		6.5
<b>Previous average:</b>		6.6
<b>Change</b>		<b>-0.1</b>
<b>Networks improved:</b>		31%
<b>Networks decreased:</b>		63%
<b>Stayed the same:</b>		6%
<b>Networks scored above 5:</b>		81%

## Profit Return

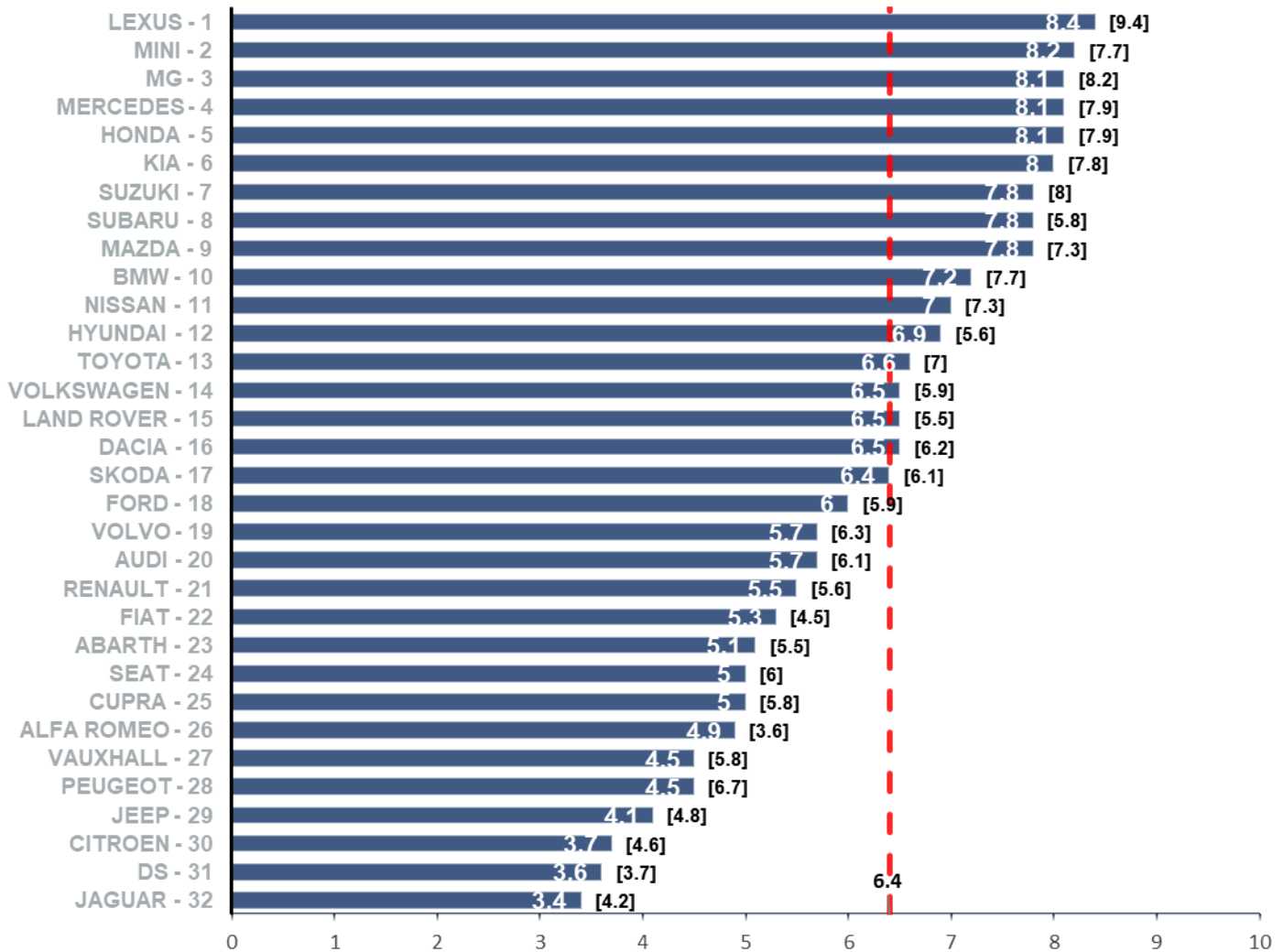
### 4. How satisfied are you with your total margin on used car sales?



<b>Biggest improvement:</b>	<b>Hyundai</b>	<b>+1.5</b>
<b>Largest decline:</b>	<b>Citroen + Jeep</b>	<b>- 1.8</b>
<b>Average score:</b>		7.4
<b>Previous average:</b>		7.4
<b>Change</b>		<b>0</b>
<b>Networks improved:</b>		44%
<b>Networks decreased:</b>		56%
<b>Stayed the same:</b>		0%
<b>Networks scored above 5:</b>		91%

## Return on Investment

### 5. How satisfied are you with the required level of capital investment?

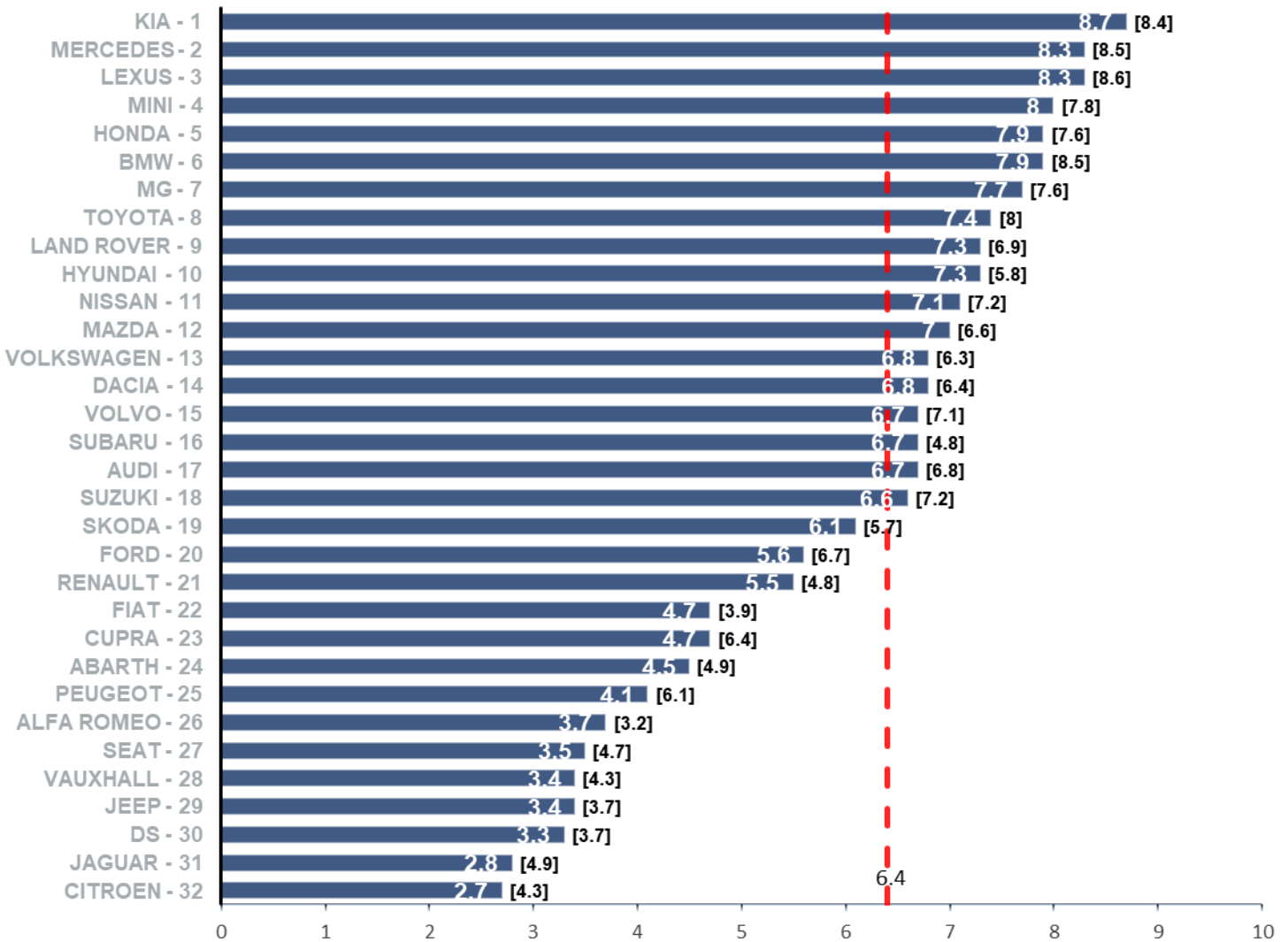


<b>Biggest improvement:</b>	<b>Subaru</b>	<b>+2</b>
<b>Largest decline:</b>	<b>Peugeot</b>	<b>-2.2</b>
<b>Average score:</b>		6.4
<b>Previous average:</b>		6.3
<b>Change</b>		<b>+0.1</b>
<b>Networks improved:</b>		44%
<b>Networks decreased:</b>		56%
<b>Stayed the same:</b>		0%
<b>Networks scored above 5:</b>		72%



## Return on Investment

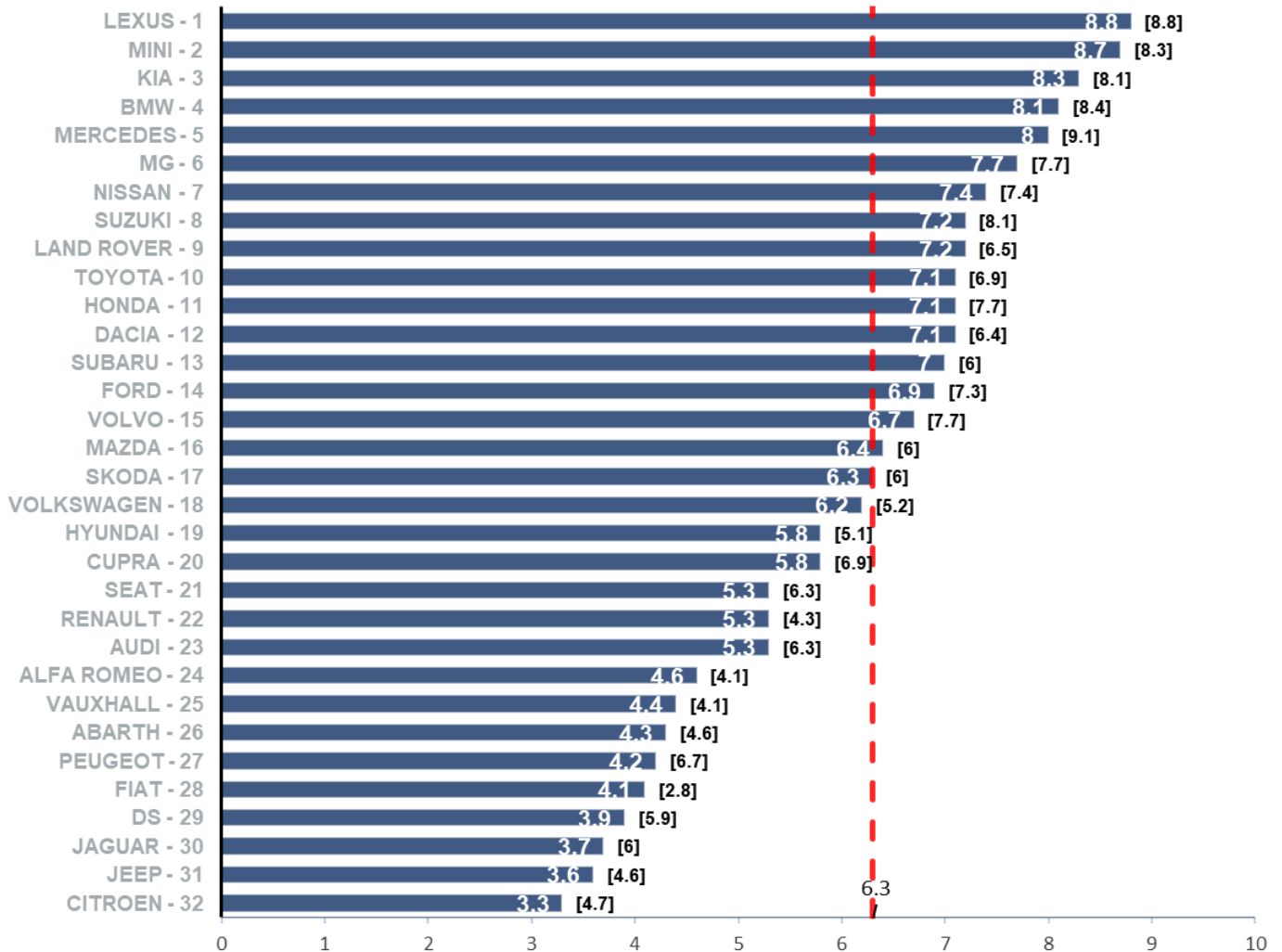
### 6. How satisfied are you with the return on capital for your dealership?



<b>Biggest improvement:</b>	<b>Subaru</b>	<b>+1.9</b>
<b>Largest decline:</b>	<b>Jaguar</b>	<b>- 2.1</b>
<b>Average score:</b>		6.4
<b>Previous average:</b>		6.2
<b>Change</b>		<b>+0.2</b>
<b>Networks improved:</b>		44%
<b>Networks decreased:</b>		56%
<b>Stayed the same:</b>		0%
<b>Networks scored above 5:</b>		66%

## Return on Investments

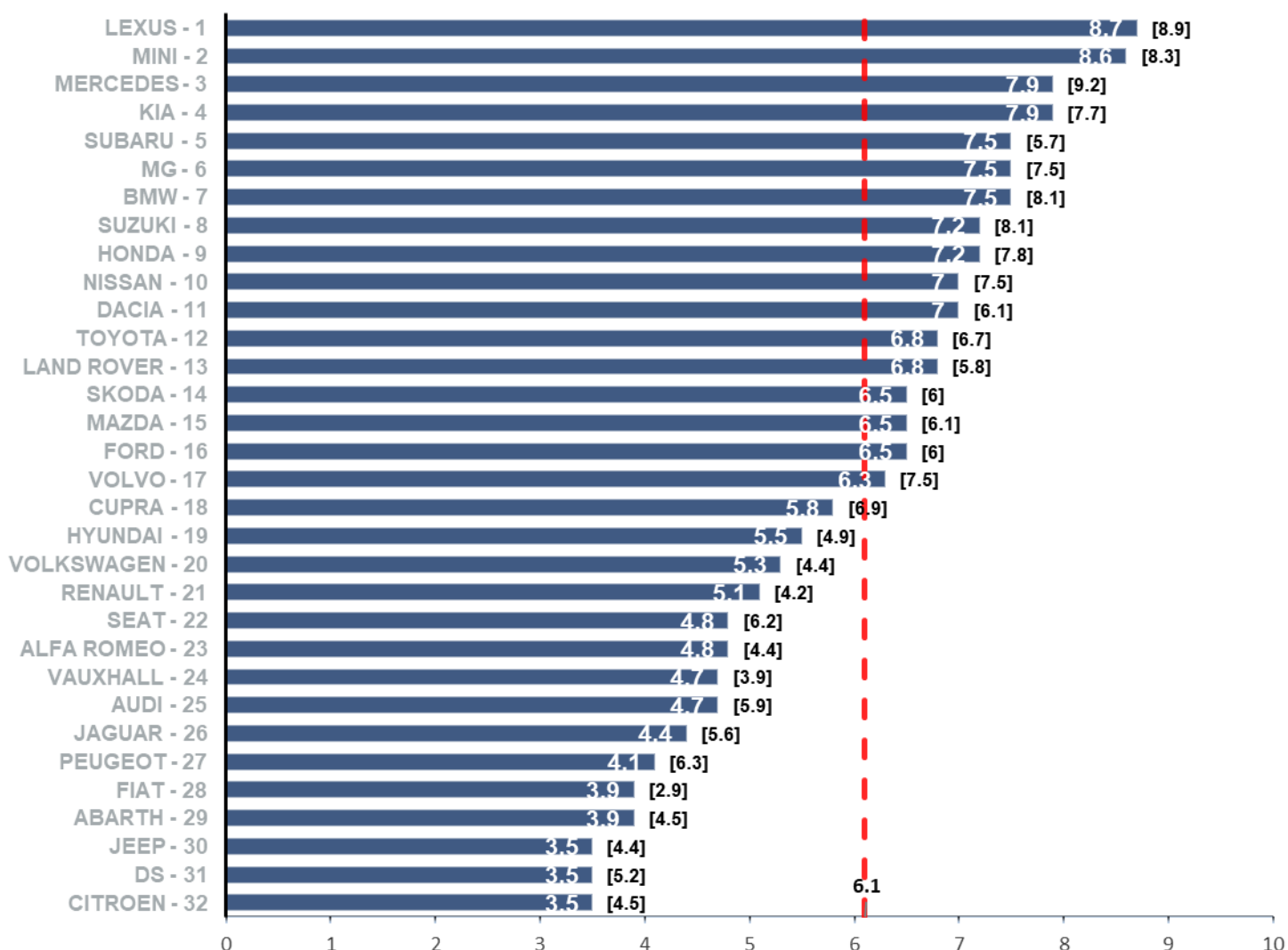
### 7. How satisfied are you that the volume target aspirations of your manufacturer are realistic?



<b>Biggest improvement:</b>	<b>Fiat</b>	<b>+1.3</b>
<b>Largest decline:</b>	<b>Peugeot</b>	<b>- 2.5</b>
<b>Average score:</b>		6.3
<b>Previous average:</b>		6.4
<b>Change</b>		<b>-0.1</b>
<b>Networks improved:</b>		44%
<b>Networks decreased:</b>		47%
<b>Stayed the same:</b>		9%
<b>Networks scored above 5:</b>		72%

## Targets

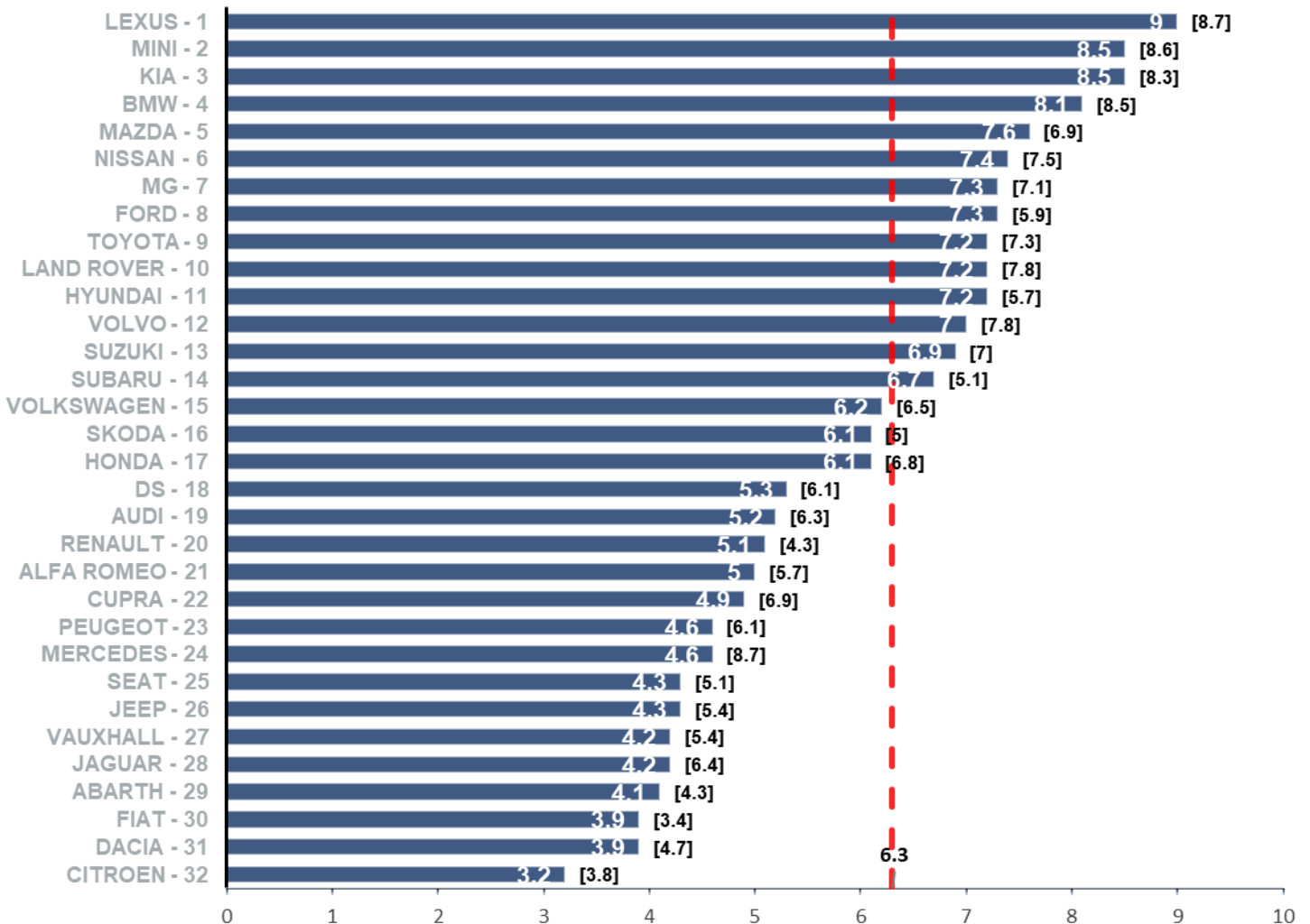
### 8. How satisfied are you with your new car targeting process?



<b>Biggest improvement:</b>	<b>Subaru</b>	<b>+1.8</b>
<b>Largest decline:</b>	<b>Peugeot</b>	<b>-2.2</b>
<b>Average score:</b>		6.1
<b>Previous average:</b>		6.1
<b>Change</b>		<b>0</b>
<b>Networks improved:</b>		47%
<b>Networks decreased:</b>		50%
<b>Stayed the same:</b>		3%
<b>Networks scored above 5:</b>		66%

## Incentives

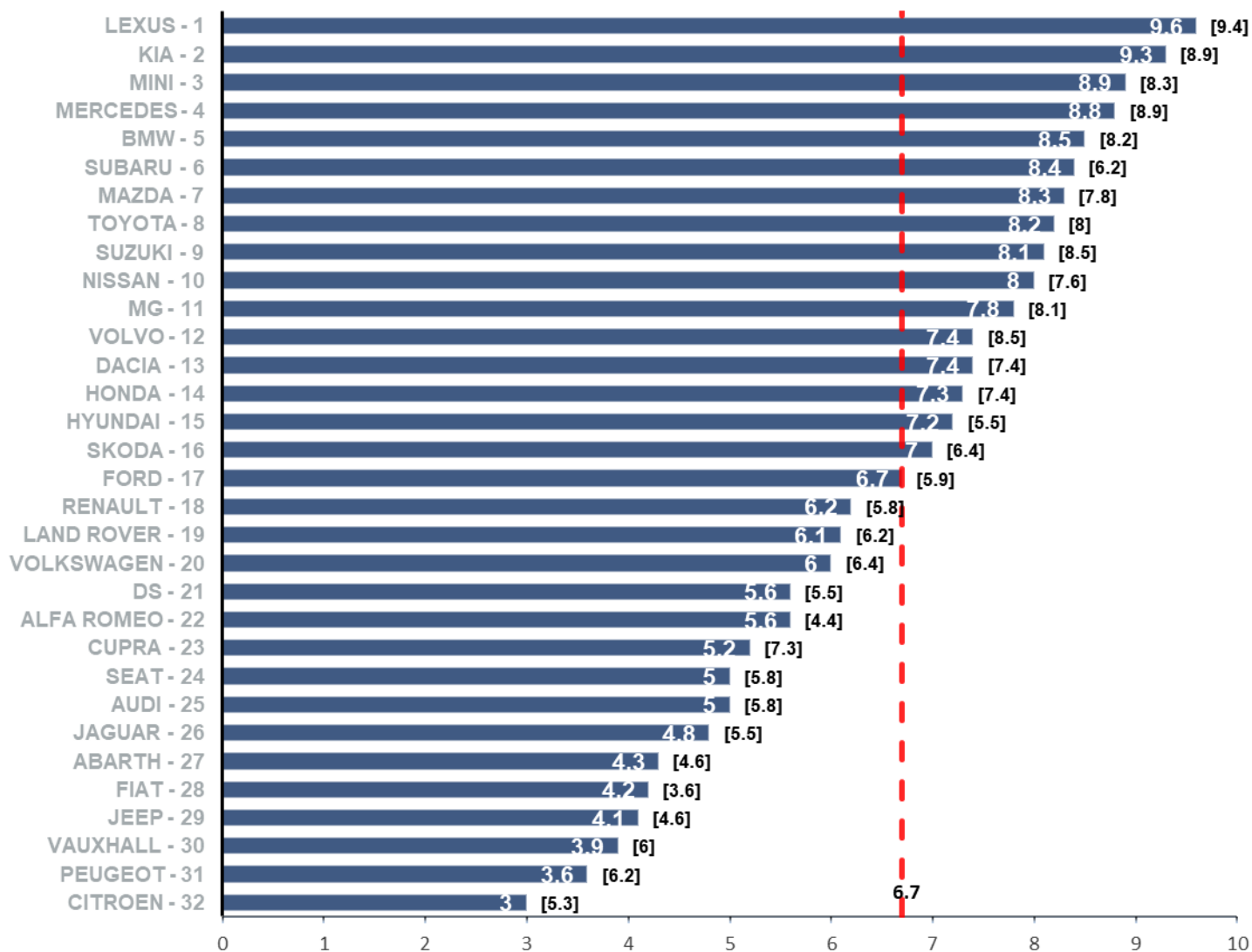
### 9. How satisfied are you with your current bonus and rebate rates on new car sales?



<b>Biggest improvement:</b>	<b>Subaru</b>	<b>+1.6</b>
<b>Largest decline:</b>	<b>Mercedes</b>	<b>-4.1</b>
<b>Average score:</b>		6.3
<b>Previous average:</b>		6.3
<b>Change</b>		<b>0</b>
<b>Networks improved:</b>		31%
<b>Networks decreased:</b>		69%
<b>Stayed the same:</b>		0%
<b>Networks scored above 5:</b>		63%

## Day-to-day Working Relationship

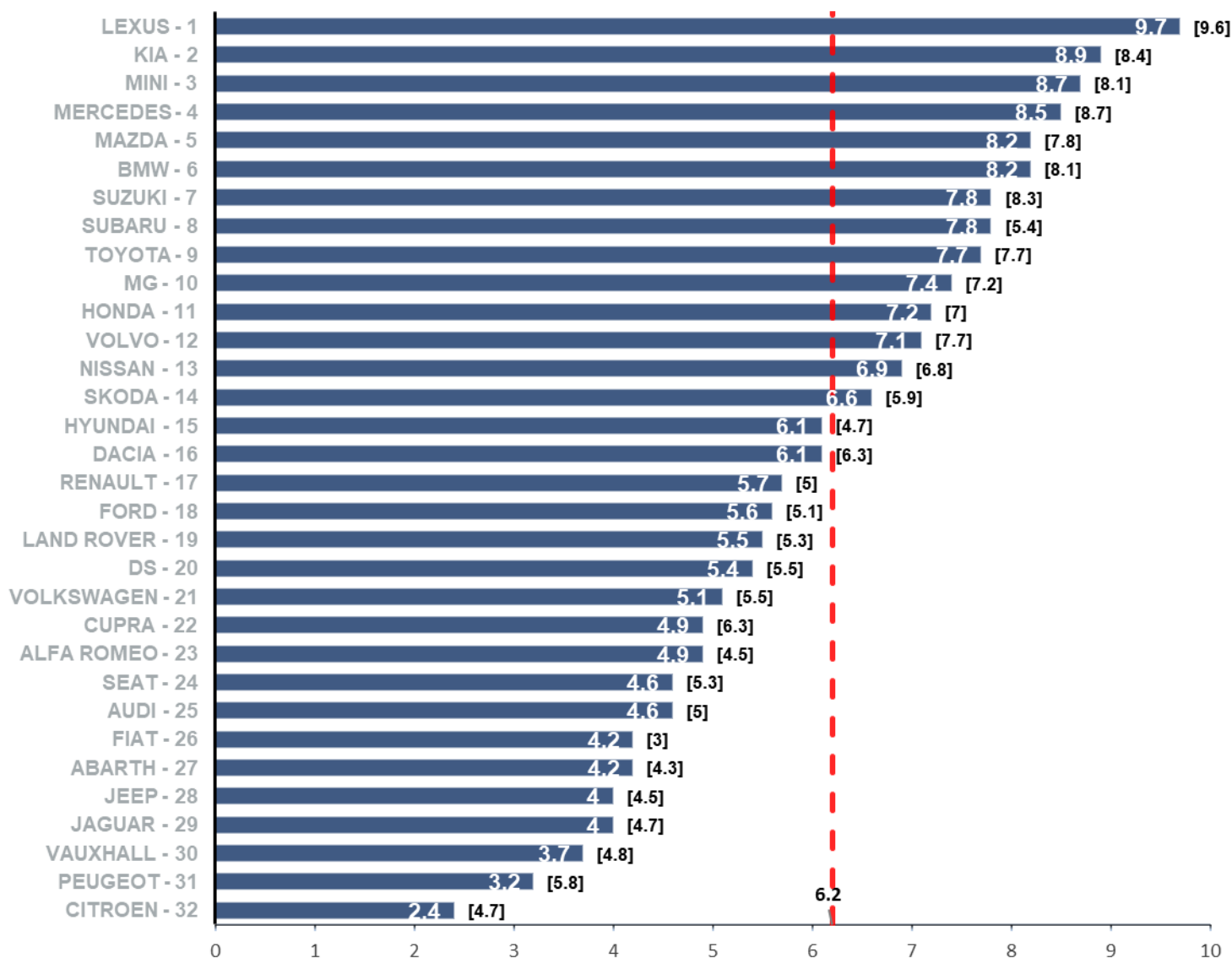
### 10. How satisfied are you with your ability to do business with your manufacturer on a day-to-day basis?



<b>Biggest improvement:</b>	<b>Subaru</b>	<b>+2.2</b>
<b>Largest decline:</b>	<b>Peugeot</b>	<b>-2.6</b>
<b>Average score:</b>		6.7
<b>Previous average:</b>		6.7
<b>Change</b>		<b>0</b>
<b>Networks improved:</b>		47%
<b>Networks decreased:</b>		50%
<b>Stayed the same:</b>		3%
<b>Networks scored above 5:</b>		72%

## Day-today Working Relationship

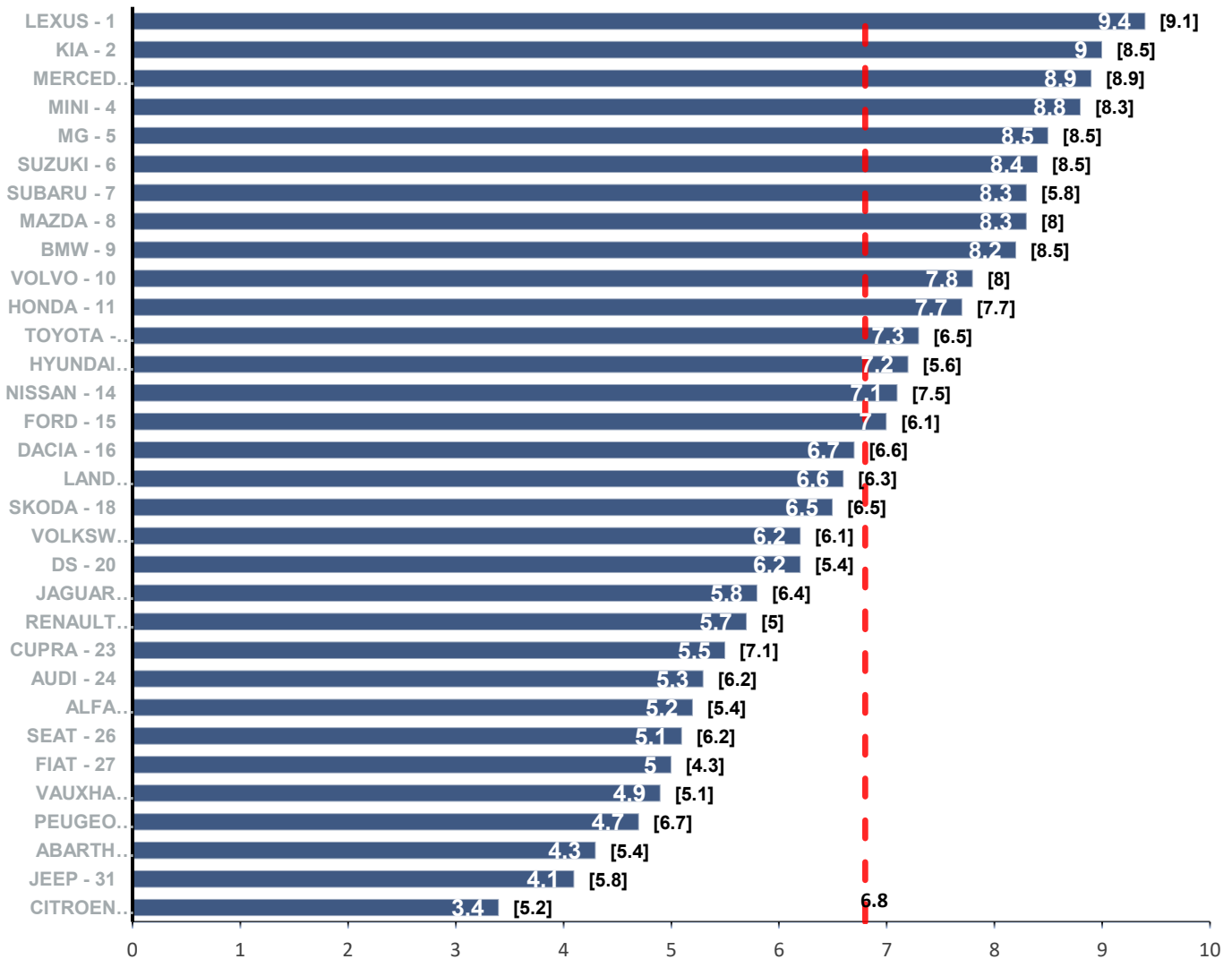
### 11. How satisfied are you that the management of your manufacturer take dealers' views and opinions into account?



<b>Biggest improvement:</b>	<b>Subaru</b>	<b>+2.4</b>
<b>Largest decline:</b>	<b>Peugeot</b>	<b>-2.6</b>
<b>Average score:</b>		6.2
<b>Previous average:</b>		6.2
<b>Change</b>		<b>0</b>
<b>Networks improved:</b>		50%
<b>Networks decreased:</b>		47%
<b>Stayed the same:</b>		3%
<b>Networks scored above 5:</b>		66%

## Standards & Performance Measures

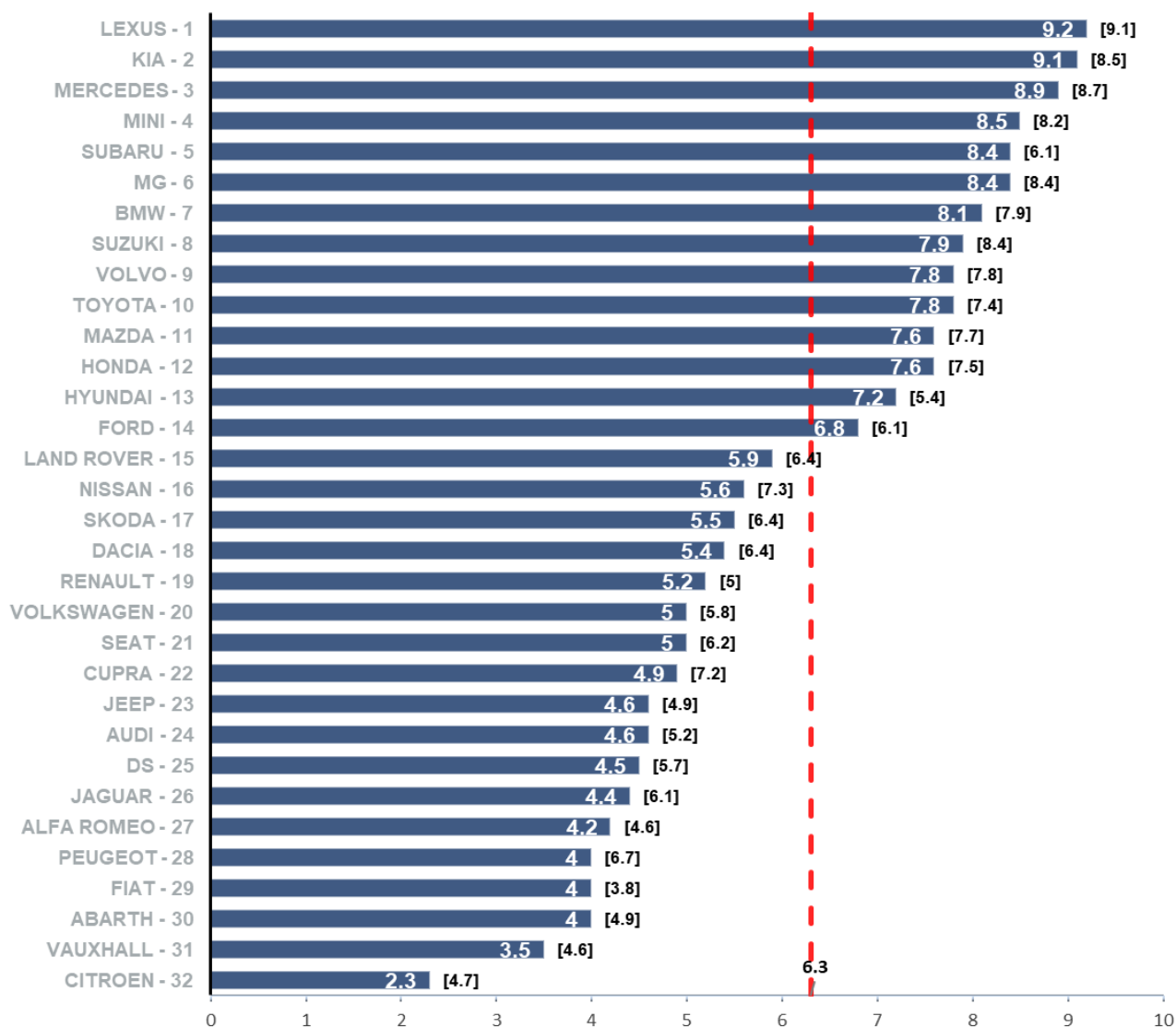
### 12. How satisfied are you that your manufacturer's dealer standards fair and reasonable?



<b>Biggest improvement:</b>	<b>Subaru</b>	<b>+2.5</b>
<b>Largest decline:</b>	<b>Peugeot</b>	<b>-2</b>
<b>Average score:</b>		6.8
<b>Previous average:</b>		6.7
<b>Change</b>		<b>+0.1</b>
<b>Networks improved:</b>		44%
<b>Networks decreased:</b>		44%
<b>Stayed the same:</b>		13%
<b>Networks scored above 5:</b>		81%

## Standards & Performance Measures

### 13. How satisfied are you that the performance, incentives and penalty regime that underpins your manufacturer's CSI programme?

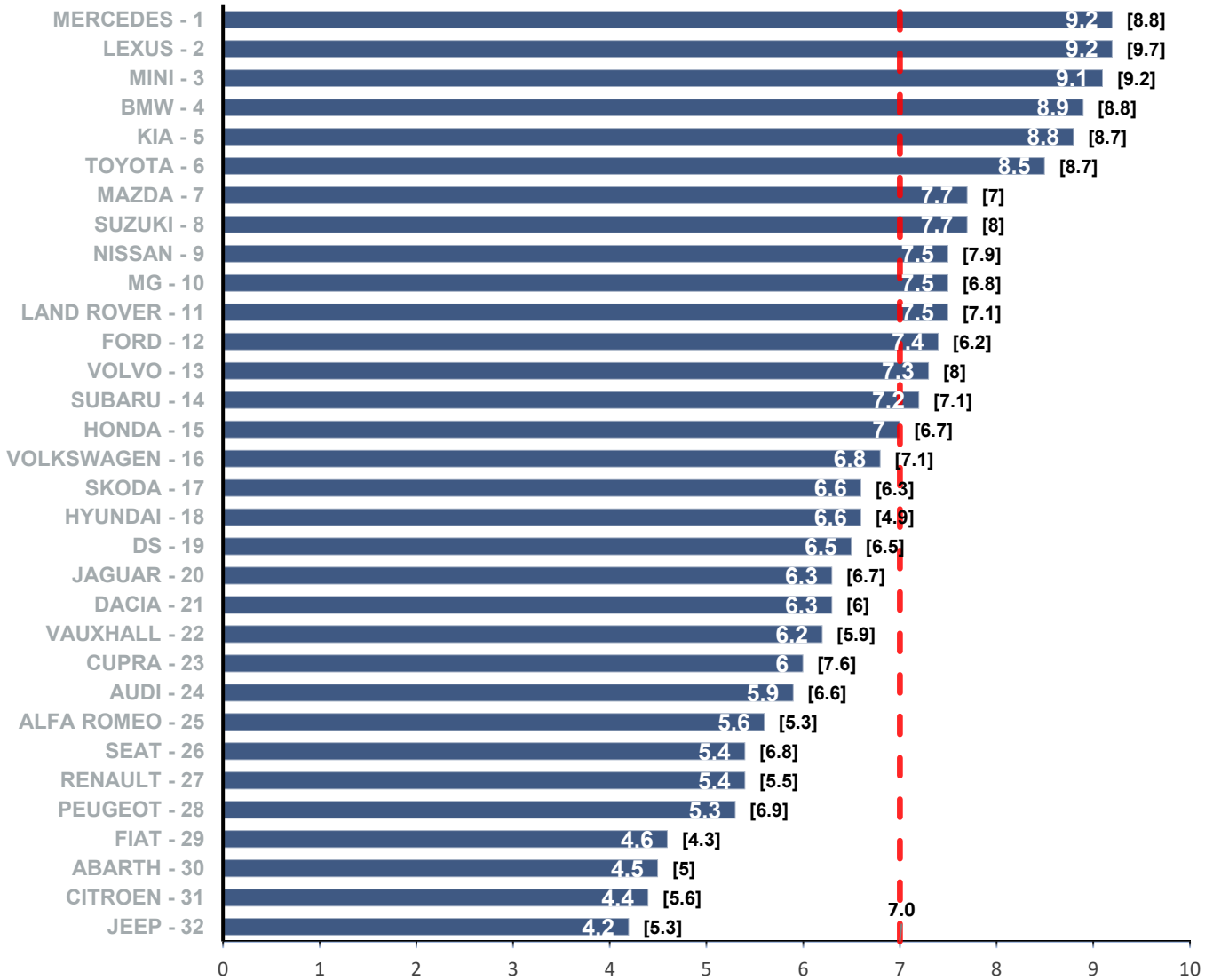


<b>Biggest improvement:</b>	<b>Subaru</b>	<b>+2.3</b>
<b>Largest decline:</b>	<b>Peugeot</b>	<b>-2.7</b>
<b>Average score:</b>		6.3
<b>Previous average:</b>		6.5
<b>Change</b>		<b>-0.2</b>
<b>Networks improved:</b>		38%
<b>Networks decreased:</b>		56%
<b>Stayed the same:</b>		6%
<b>Networks scored above 5:</b>		59%



## Training

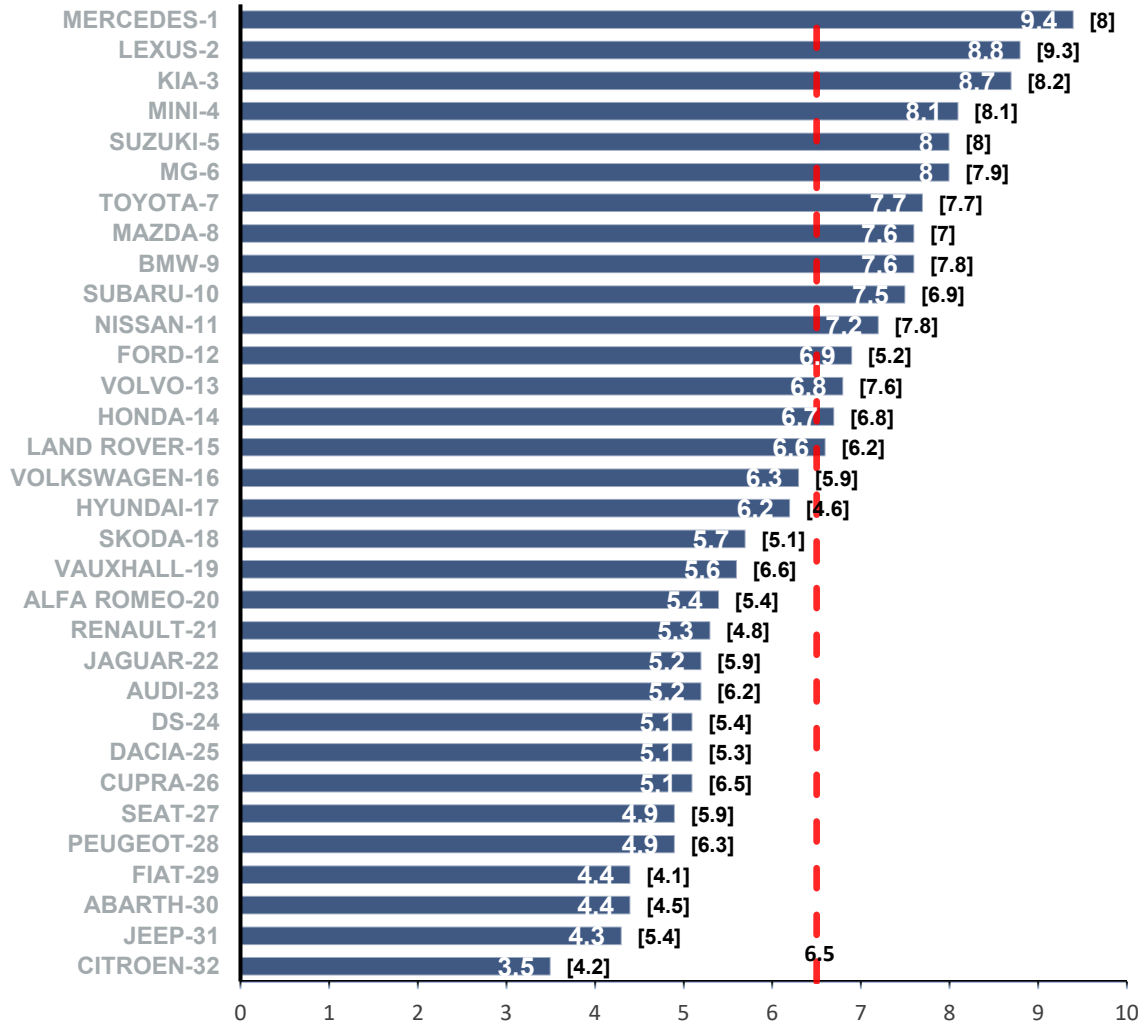
### 14. How satisfied are you with the quality of your manufacturer's training?



<b>Biggest improvement:</b>	<b>Hyundai</b>	<b>+1.7</b>
<b>Largest decline:</b>	<b>Peugeot</b>	<b>-1.6</b>
<b>Average score:</b>		7.0
<b>Previous average:</b>		6.9
<b>Change</b>		<b>+0.1</b>
<b>Networks improved:</b>		47%
<b>Networks decreased:</b>		50%
<b>Stayed the same:</b>		3%
<b>Networks scored above 5:</b>		88%

## Training

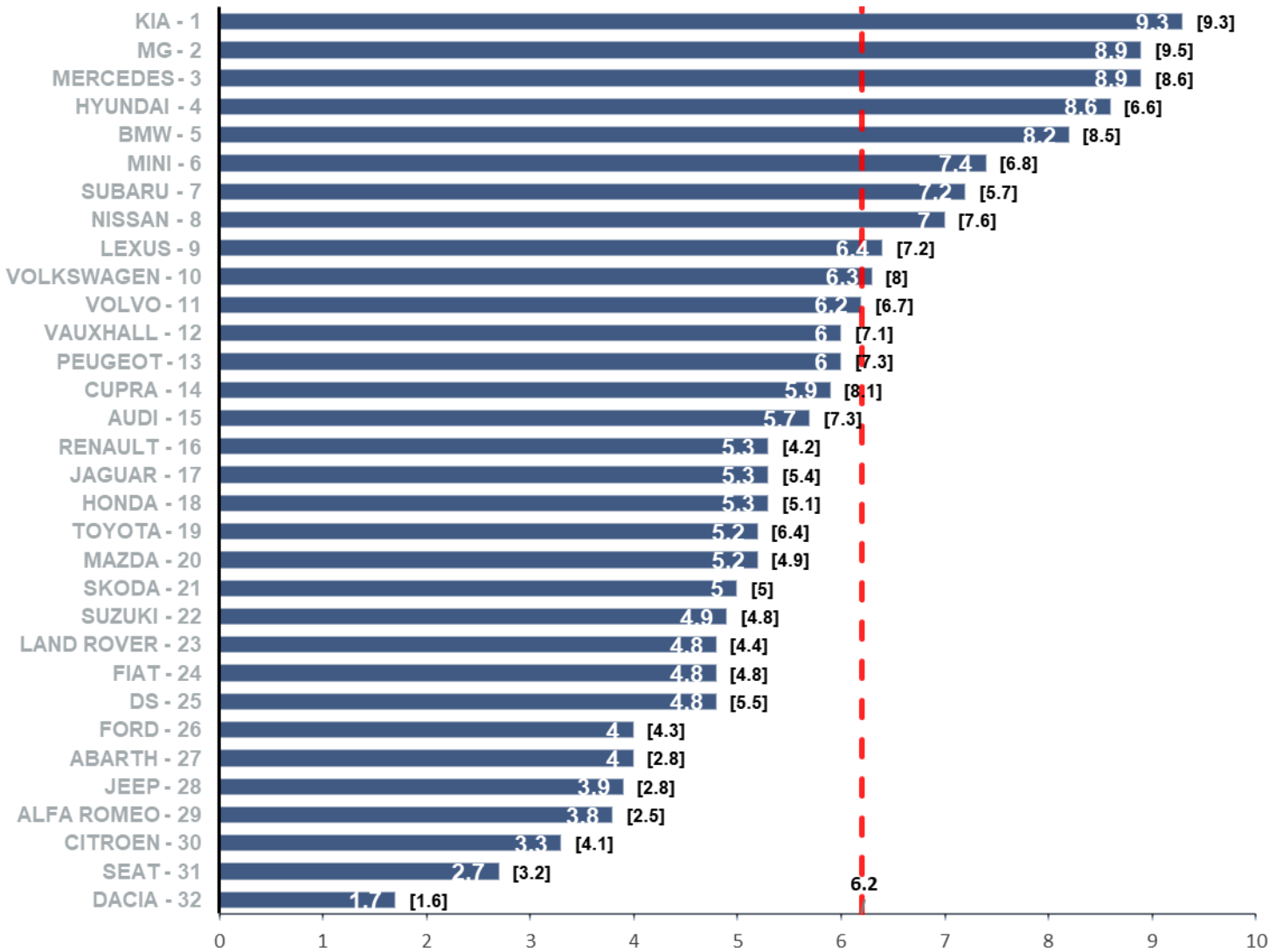
### 15. How satisfied are you with the cost of your manufacturer's training?



<b>Biggest improvement:</b>	<b>Ford</b>	<b>+1.7</b>
<b>Largest decline:</b>	<b>Cupra+ Peugeot</b>	<b>-1.4</b>
<b>Average score:</b>		6.5
<b>Previous average:</b>		6.4
<b>Change</b>		<b>+0.1</b>
<b>Networks improved:</b>		38%
<b>Networks decreased:</b>		50%
<b>Stayed the same:</b>		13%
<b>Networks scored above 5:</b>		81%

## Electric Vehicles & Plug-in Hybrids

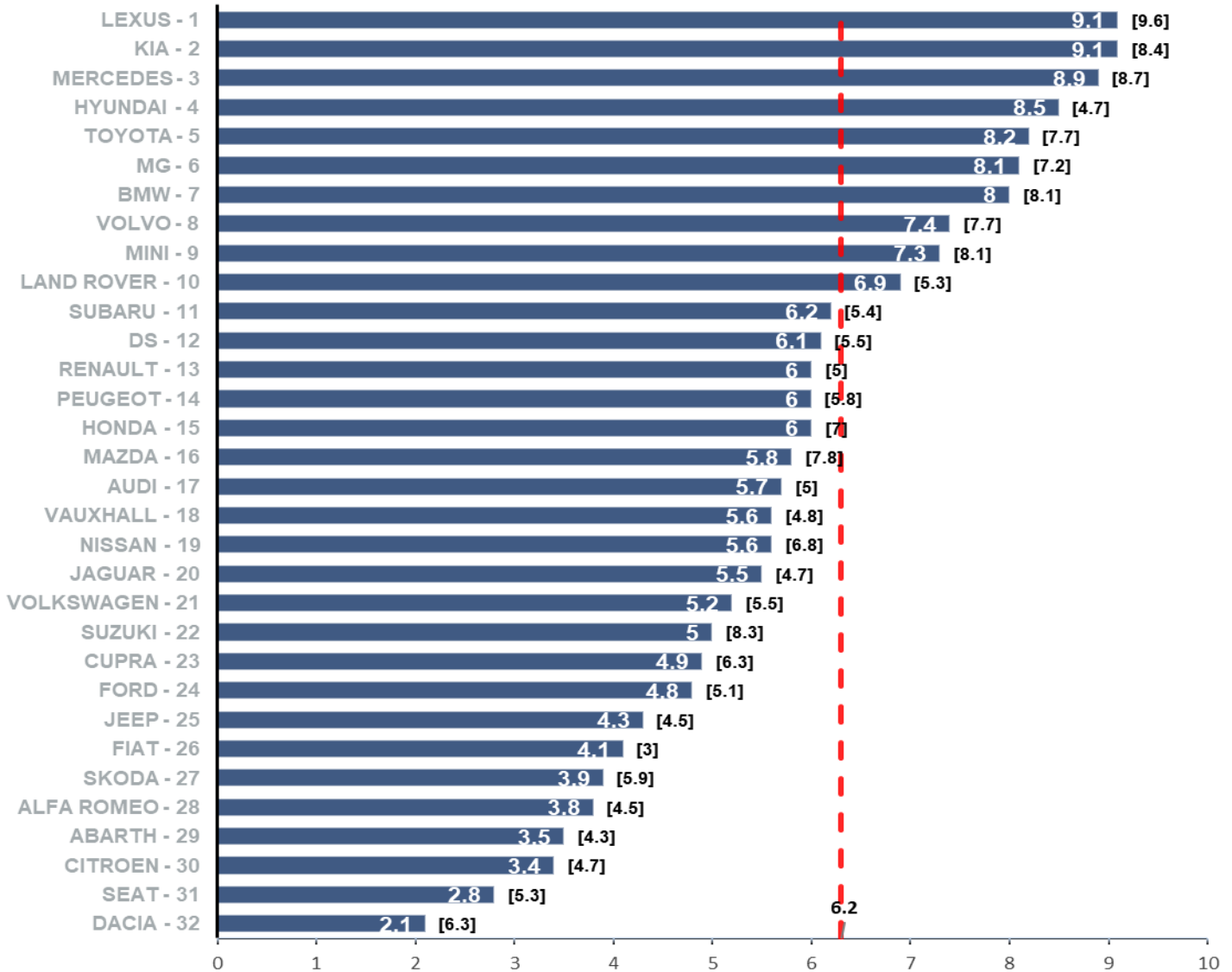
### 16. How satisfied are you with the battery electric vehicle products your manufacturer currently offers?



<b>Biggest improvement:</b>	<b>Hyundai</b>	<b>+2.0</b>
<b>Largest decline:</b>	<b>Cupra</b>	<b>-2.2</b>
<b>Average score:</b>		6.2
<b>Previous average:</b>		5.8
<b>Change</b>		<b>+0.4</b>
<b>Networks improved:</b>		41%
<b>Networks decreased:</b>		50%
<b>Stayed the same:</b>		9%
<b>Networks scored above 5:</b>		63%

## Electric Vehicles & Plug-in Hybrids

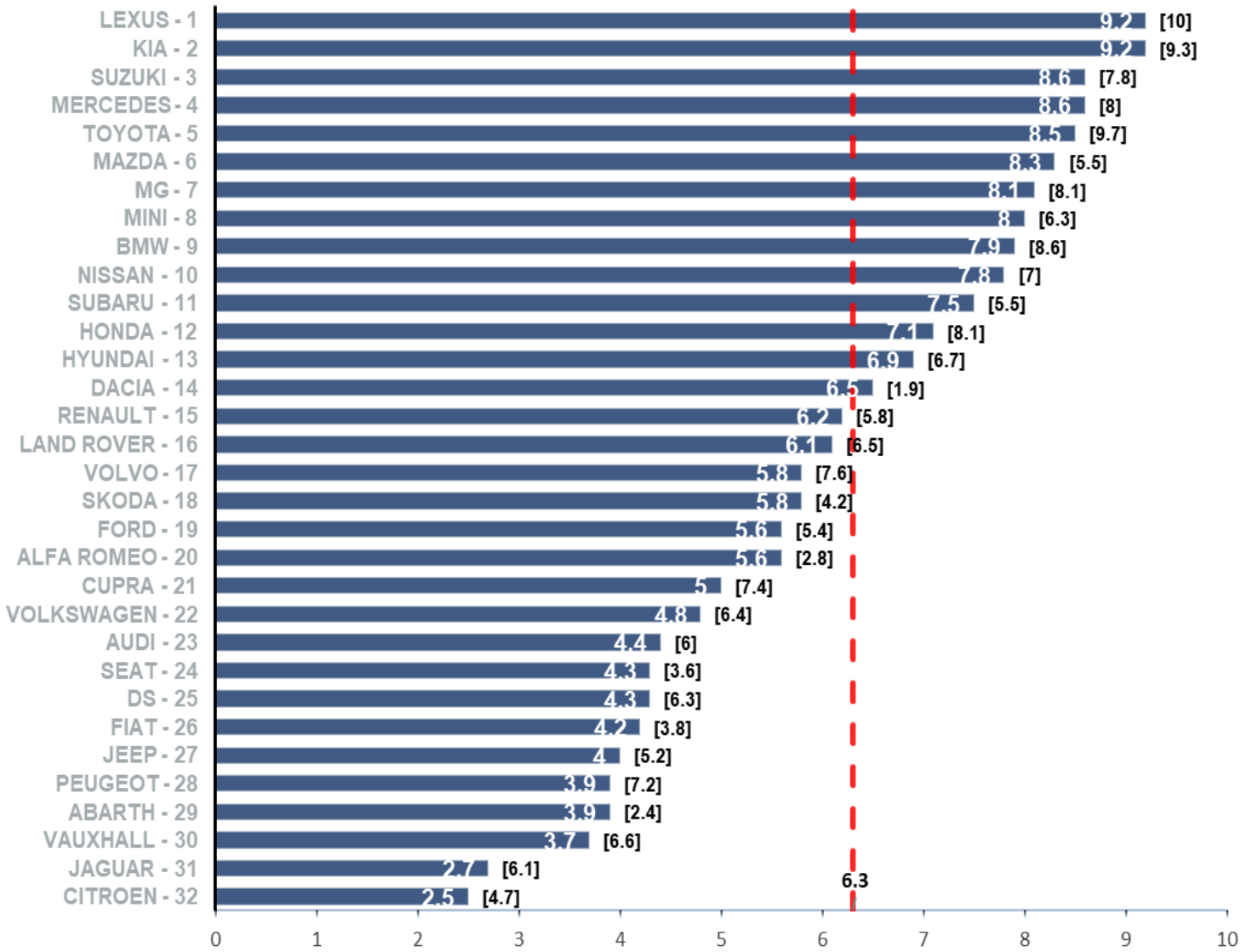
### 17. How satisfied are you with plug-in hybrid vehicle products your manufacturers currently offers?



<b>Biggest improvement:</b>	<b>Hyundai</b>	<b>+3.8</b>
<b>Largest decline:</b>	<b>Dacia</b>	<b>- 4.2</b>
<b>Average score:</b>		6.3
<b>Previous average:</b>		6.0
<b>Change</b>		<b>+0.3</b>
<b>Networks improved:</b>		50%
<b>Networks decreased:</b>		50%
<b>Stayed the same:</b>		0
<b>Networks scored above 5:</b>		66%

## Future Directions

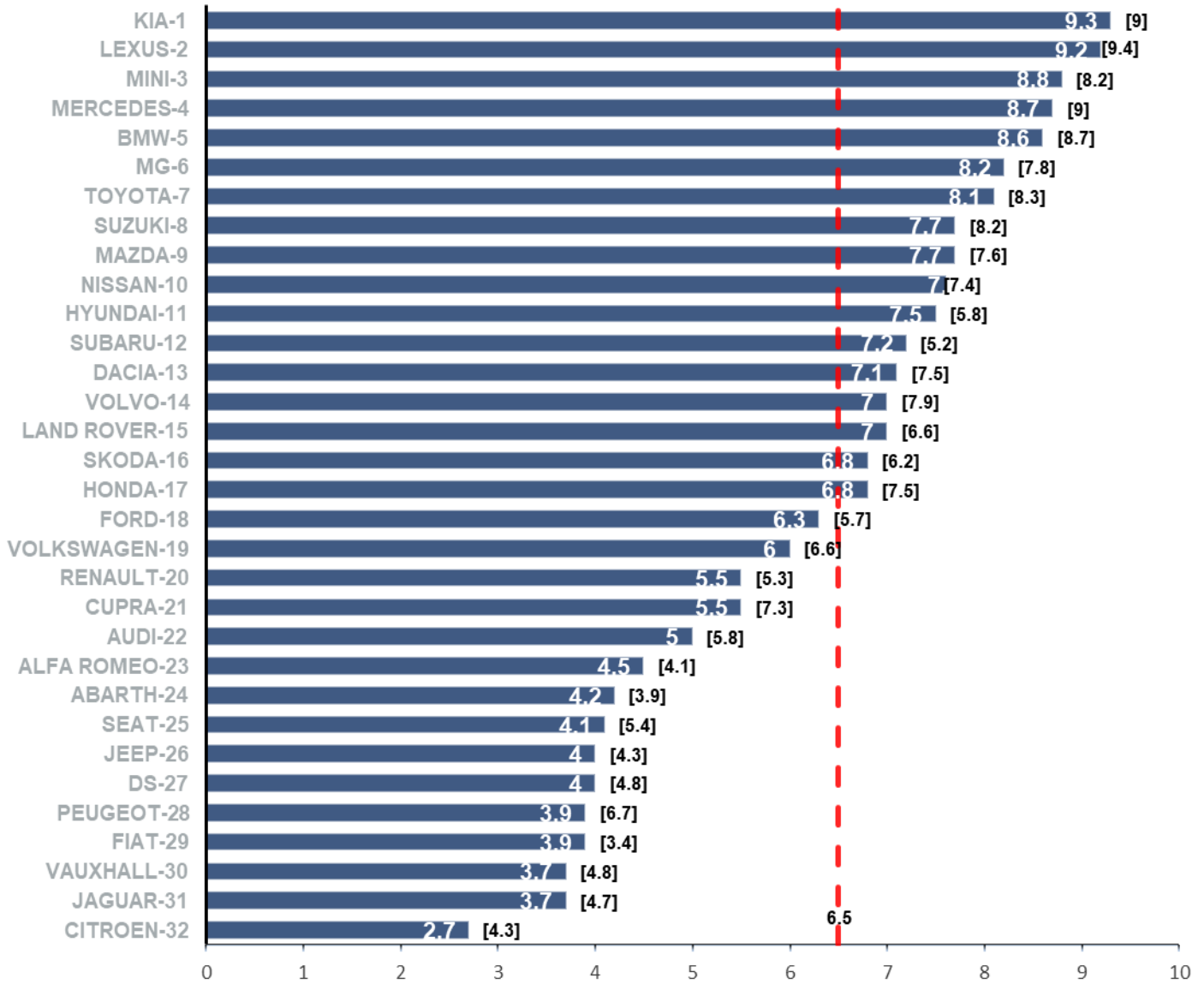
### 18. How satisfied are you with your manufacturer's approach to future retailing agreements and contracts?



<b>Biggest improvement:</b>	<b>Dacia</b>	<b>+4.6</b>
<b>Largest decline:</b>	<b>Jaguar</b>	<b>-3.4</b>
<b>Average score:</b>		6.3
<b>Previous average:</b>		6.3
<b>Change</b>		<b>0</b>
<b>Networks improved:</b>		47%
<b>Networks decreased:</b>		50%
<b>Stayed the same:</b>		3%
<b>Networks scored above 5:</b>		63%

## Overall Scores

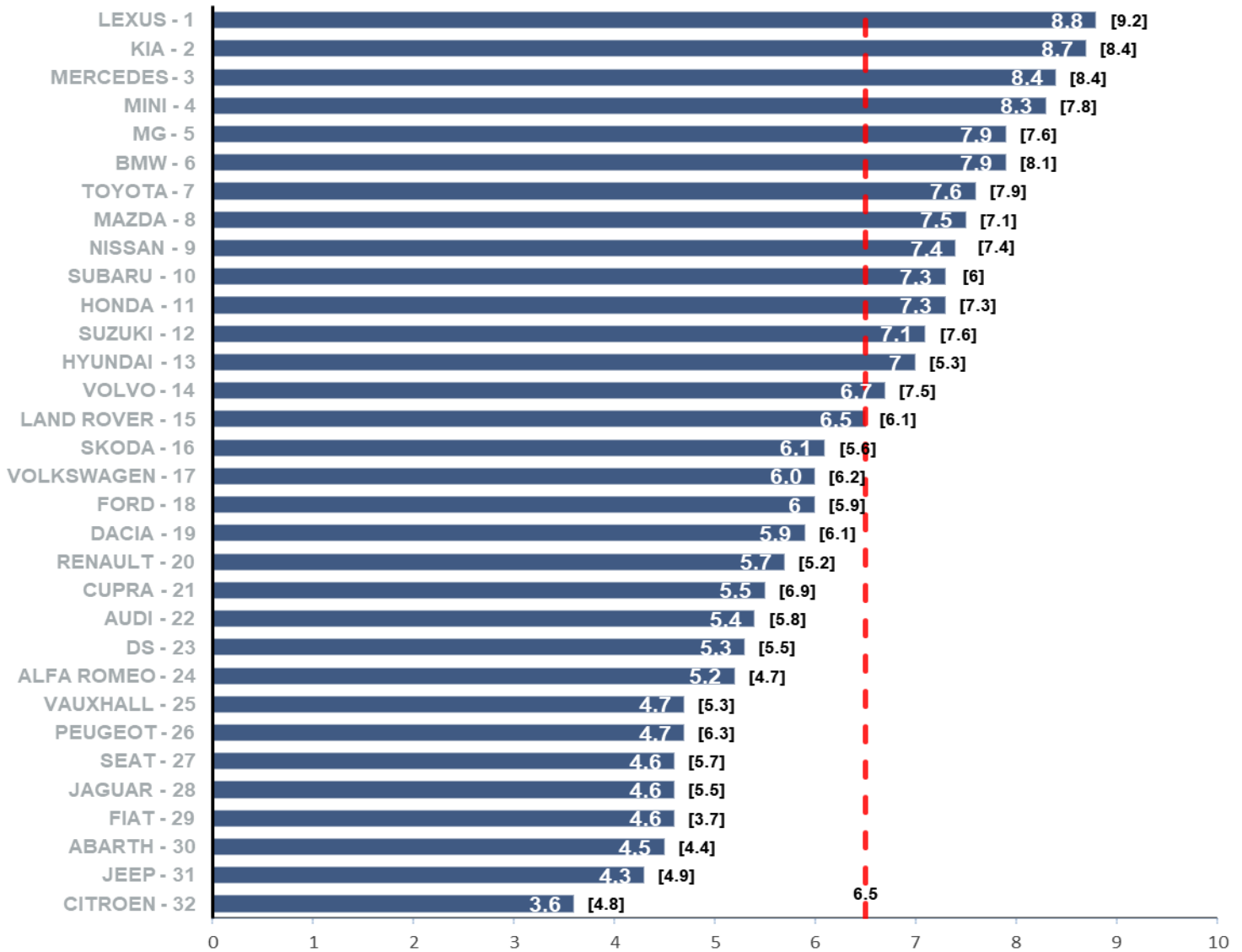
### 19. How would you rate your manufacturer overall?



<b>Biggest improvement:</b>	<b>Subaru</b>	<b>+2.0</b>
<b>Largest decline:</b>	<b>Peugeot</b>	<b>-2.8</b>
<b>Average score:</b>		6.5
<b>Previous average:</b>		6.5
<b>Change</b>		0
<b>Networks improved:</b>		44%
<b>Networks decreased:</b>		56%
<b>Stayed the same:</b>		0
<b>Networks scored above 5:</b>		66%

## Overall Scores

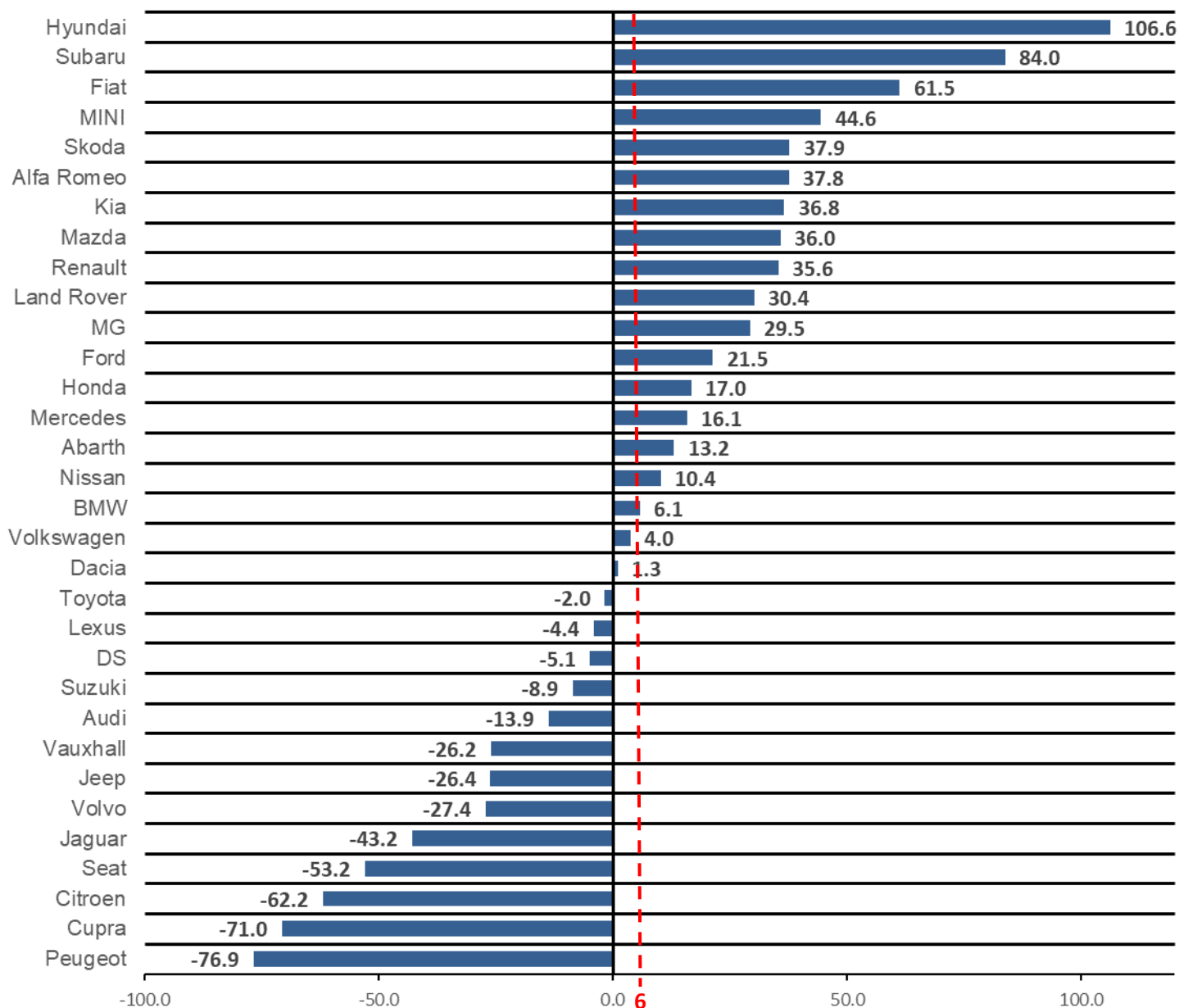
### 20. Average score across all questions



<b>Biggest improvement:</b>	Hyundai	+1.7
<b>Largest decline:</b>	Peugeot	- 1.6
<b>Average score:</b>		6.5
<b>Previous average:</b>		6.4
<b>Change</b>		+0.1
<b>Networks improved:</b>		41%
<b>Networks decreased:</b>		50%
<b>Stayed the same:</b>		9%
<b>Networks scored above 5:</b>		75%

## Overall Scores

### 21. Total movement across all questions



#### Summary:

The movement in score across all questions of the survey indicates the overall improvements and declines of each manufacturer. Hyundai saw the largest upward movement with an overall improvement of 106.6, whilst Peugeot experienced the biggest decline with a total loss of -76.9 points. On average, ratings increased by 6 points from six months ago.





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