



**National Franchised
Dealers Association**

Dealer Attitude Survey

Winter 2024

Manufacturer Summary

DAS Manufacturer Summary

The manufacturer summaries are designed 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.

Also included is a set of **scoring reference tables** for each manufacturer detailing each question score and the key variances to last year and survey average.

If you require further analysis, please contact nfda@metryx.co.uk

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?

Summer 2023

3.9

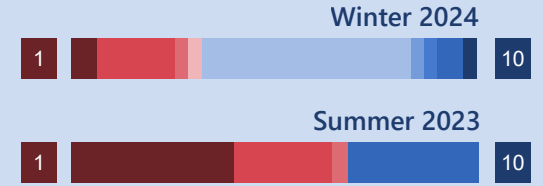
Winter 2024

5.2

Ranking vs. Summer 23
27 vs. 24

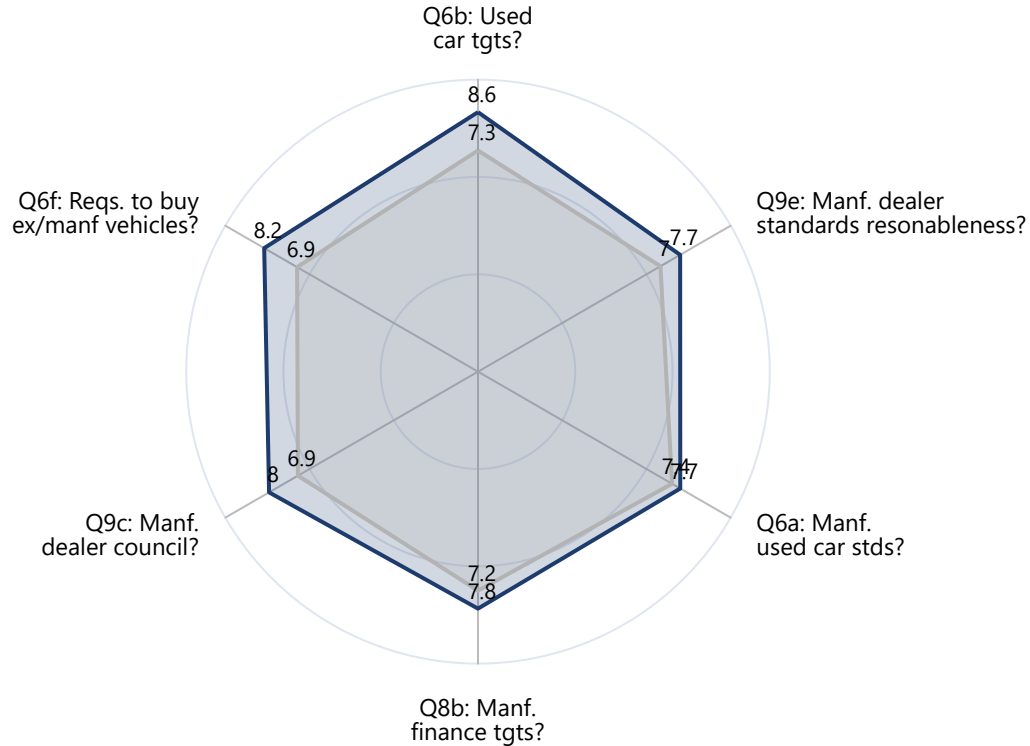
% Change
+33.3%

Score Change
+1.3 pts



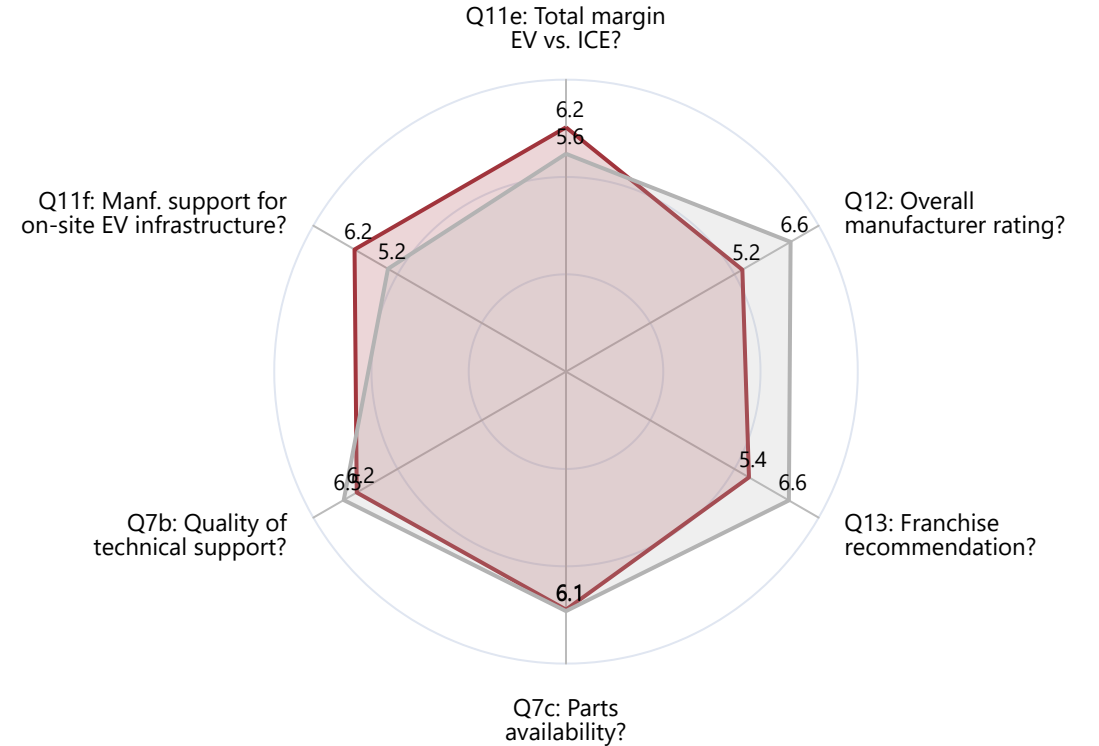
Top 6 Questions vs Average

Brand 2024 ● | Average 2024 ●



Bottom 6 Questions vs Average

Brand 2024 ● | Average 2024 ●



Question 4 - Value of the franchise	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	3.9	7.0	+3.1	+0.9
Q4b: The future profit return from representing your franchise?	4.5	7.0	+2.5	+0.9
Q4c: The required level of capital investment?	4.1	7.2	+3.1	+0.9
Q4d: The cost required in your dealership to meet franchised standards?	5.0	7.3	+2.3	+1.1
Q4e: The return on capital for your dealership?	3.5	7.0	+3.5	+1.0
Q4f: The quality of guidance provided by your manufacturer to your dealership?	3.8	7.1	+3.3	+0.7
Q4g: The financial support available to your dealership from your manufacturer?	3.9	6.9	+3.0	+1.1

Question 6 - Used car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	4.9	7.7	+2.8	+0.3
Q6b: The targets set by your manufacturer for used cars?	5.6	8.6	+3.0	+1.3
Q6c: The cost and quality of your manufacturer's used car warranties?	4.8	7.5	+2.7	+0.6
Q6d: Your total margin on used car sales?	5.9	7.7	+1.8	+0.7
Q6e: Your manufacturer's used car programme?	4.7	7.7	+3.0	+0.6
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	5.4	8.2	+2.8	+1.3

Question 5 - New car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	5.0	7.2	+2.2	+1.0
Q5b: Your new car targeting process?	4.4	6.7	+2.3	+0.6
Q5c: Your ability to meet your manufacturers new car targets in the current market conditions?		6.6	-	+0.7
Q5d: Your total margin on new vehicles?	4.2	6.5	+2.3	+0.4
Q5e: Your current bonus and rebate rates on new car sales?	4.3	6.6	+2.3	+0.5
Q5f: Manufacturer inducement to self register vehicles?	5.0	7.1	+2.1	+1.0
Q5g: Manufacturer's new vehicle supply?	3.9	6.4	+2.5	+0.0
Q5h: The fairness of your manufacturer's new car ordering and stocking policies?	3.6	6.5	+2.9	-0.1
Q5i: The fairness of your manufacturer's demonstrator programme?	5.1	7.2	+2.1	+0.8
Q5j: The affect the ZEV Mandate is having on obtaining new vehicles for customer orders?		6.5	-	+0.2

Question 7 - Aftersales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	5.2	7.3	+2.1	+0.6
Q7b: Quality of technical support?	4.9	6.2	+1.3	-0.4
Q7c: Availability of parts?	4.9	6.1	+1.2	-0.0
Q7d: Price of manufacturer parts compared with parts factors?	4.7	6.5	+1.8	+0.6
Q7e: Service profitability earnings?	5.2	6.5	+1.3	-0.1
Q7f: Manufacturer service plan rates and recovery?	5.5	6.6	+1.1	+0.2
Q7g: The fairness of your manufacturer's warranty policy for you and your customers?	4.1	6.4	+2.3	-0.5
Q7h: Your manufacturer's stocking policy for parts/accessories?	5.0	7.0	+2.0	+0.0

Question 8 - Finance					Question 10 - Product and marketing				
	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.		Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	4.0	7.5	+3.5	+0.4	Q10a: Frequency of introduction of new models?	4.4	6.6	+2.2	-0.4
Q8b: The reasonableness of the finance targets set by your manufacturer?	4.0	7.8	+3.8	+0.6	Q10b: Product value and pricing?	4.5	7.5	+3.0	+0.8
Q8c: The earnings potential of your manufacturer's finance programme?	4.0	7.2	+3.2	+0.9	Q10c: Product advertising?	4.2	7.1	+2.9	+0.4
Q8d: The support you receive from your manufacturer's finance house?	3.8	7.1	+3.3	+0.2	Question 11 - Electric vehicle/Plug-in vehicles				
Question 9 - Dealer/Manufacturer relationships					Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	4.7	7.3	+2.6	+0.2	Q11a: Battery Electric Vehicle products your manufacturer currently offers?	4.8	6.6	+1.8	+0.5
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	5.0	7.2	+2.2	+0.6	Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	5.1	6.4	+1.3	-0.5
Q9c: Your manufacturer's dealer council/franchise board?	5.6	8.0	+2.4	+1.1	Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	4.8	6.5	+1.7	-0.2
Q9d: Your manufacturer's response to your communications with them?	5.2	7.3	+2.1	+0.5	Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	3.6	6.4	+2.8	+0.9
Q9e: Your manufacturer dealer standards are fair and reasonable?	4.8	7.7	+2.9	+0.8	Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	4.1	6.2	+2.1	+0.7
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	4.7	6.4	+1.7	-0.2	Q11f: With your manufacturer's support with on-site EV charging infrastructure?	3.9	6.2	+2.3	+1.0
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	4.8	7.3	+2.5	+0.5	Q11g: That your manufacturer's Electric Vehicle charging information and training equips your customers to successfully transition to an EV?		6.3	-	+0.0
Q9h: The value of manufacturer field staff to your business?	2.2	7.5	+5.3	+0.7	Question 12 & 13 - Overall Rating				
Q9i: The quality of your manufacturer's training?	4.7	7.4	+2.7	+0.3	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9j: The cost of manufacturer's training?	4.1	6.7	+2.6	+0.4	Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	3.9	5.2	+1.3	-1.4
Q9k: Your manufacturer's apprenticeship programme?	5.4	7.4	+2.0	+0.2	Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	4.4	5.4	+1.0	-1.2
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	4.1	6.9	+2.8	+0.4					

Overall Manufacturer Rating

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

Summer 2023

2.5

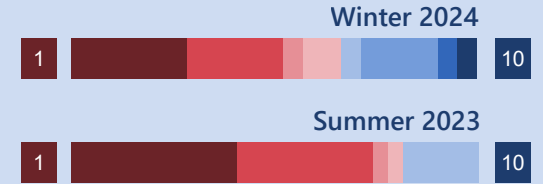
Winter 2024

4.0

Ranking vs. Summer 23
31 vs. 29

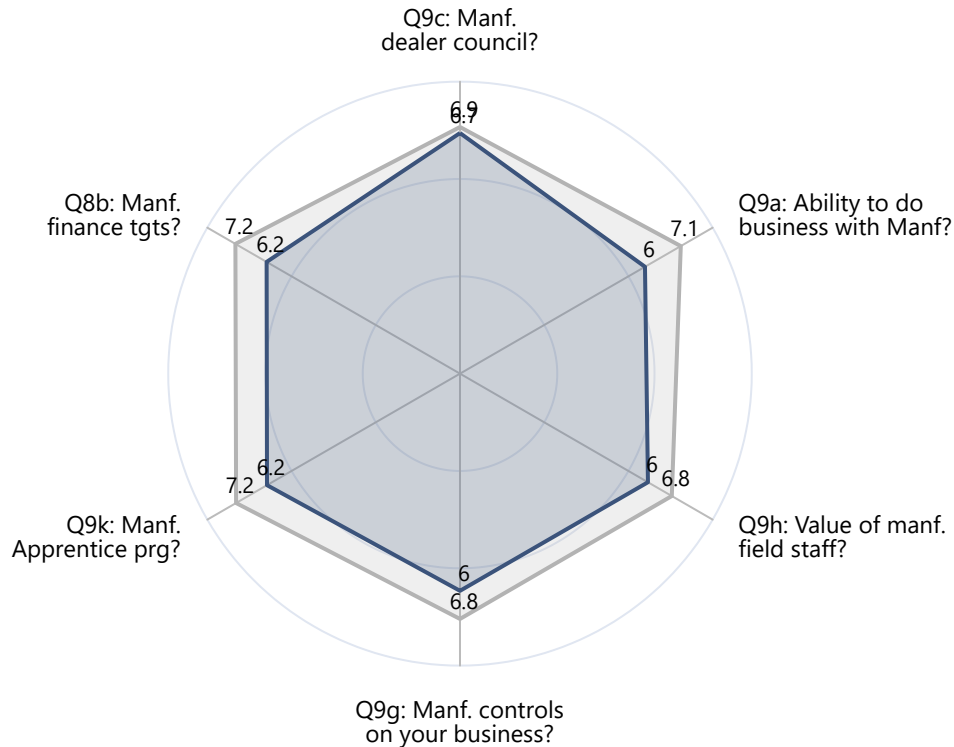
% Change
+60.0%

Score Change
+1.5 pts



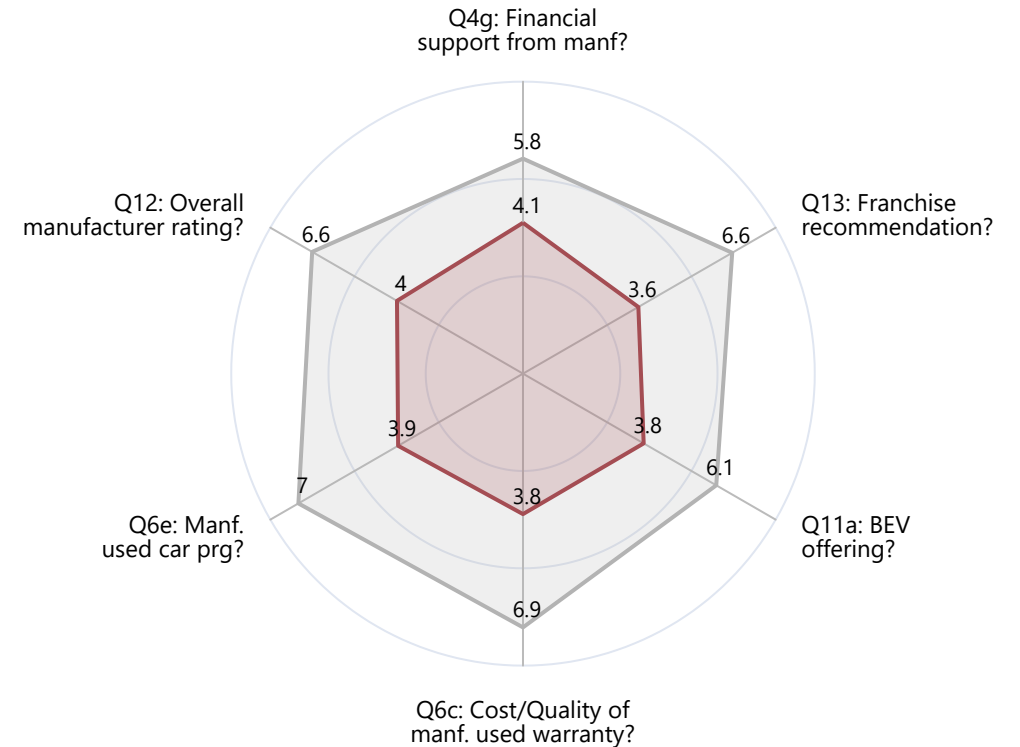
Top 6 Questions vs Average

Brand 2024 ● | Average 2024 ●



Bottom 6 Questions vs Average

Brand 2024 ● | Average 2024 ●



Question 4 - Value of the franchise	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	2.7	4.2	+1.5	-1.8
Q4b: The future profit return from representing your franchise?	2.8	4.7	+1.9	-1.4
Q4c: The required level of capital investment?	2.6	4.2	+1.6	-2.0
Q4d: The cost required in your dealership to meet franchised standards?	2.4	4.3	+1.9	-2.0
Q4e: The return on capital for your dealership?	2.6	4.2	+1.6	-1.7
Q4f: The quality of guidance provided by your manufacturer to your dealership?	2.7	4.9	+2.2	-1.5
Q4g: The financial support available to your dealership from your manufacturer?	2.4	4.1	+1.7	-1.7

Question 6 - Used car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	3.2	4.3	+1.1	-3.1
Q6b: The targets set by your manufacturer for used cars?	4.6	5.3	+0.7	-2.0
Q6c: The cost and quality of your manufacturer's used car warranties?	3.3	3.8	+0.5	-3.1
Q6d: Your total margin on used car sales?	4.7	4.6	-0.1	-2.4
Q6e: Your manufacturer's used car programme?	3.4	3.9	+0.5	-3.1
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	3.5	4.4	+0.9	-2.5

Question 5 - New car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	4.0	5.5	+1.5	-0.7
Q5b: Your new car targeting process?	3.9	5.4	+1.5	-0.6
Q5c: Your ability to meet your manufacturers new car targets in the current market conditions?		4.7	-	-1.2
Q5d: Your total margin on new vehicles?	3.6	4.8	+1.2	-1.3
Q5e: Your current bonus and rebate rates on new car sales?	3.0	4.8	+1.8	-1.4
Q5f: Manufacturer inducement to self register vehicles?	3.3	5.1	+1.8	-1.0
Q5g: Manufacturer's new vehicle supply?	3.9	5.0	+1.1	-1.4
Q5h: The fairness of your manufacturer's new car ordering and stocking policies?	2.9	4.7	+1.8	-1.8
Q5i: The fairness of your manufacturer's demonstrator programme?	3.8	5.1	+1.3	-1.2
Q5j: The affect the ZEV Mandate is having on obtaining new vehicles for customer orders?		5.2	-	-1.1

Question 7 - Aftersales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	4.6	5.7	+1.1	-1.1
Q7b: Quality of technical support?	3.3	4.8	+1.5	-1.7
Q7c: Availability of parts?	3.2	4.8	+1.6	-1.3
Q7d: Price of manufacturer parts compared with parts factors?	3.1	4.6	+1.5	-1.3
Q7e: Service profitability earnings?	4.0	5.2	+1.2	-1.4
Q7f: Manufacturer service plan rates and recovery?	3.7	4.7	+1.0	-1.8
Q7g: The fairness of your manufacturer's warranty policy for you and your customers?	3.7	5.0	+1.3	-2.0
Q7h: Your manufacturer's stocking policy for parts/accessories?	4.1	5.6	+1.5	-1.4

Question 8 - Finance					Question 10 - Product and marketing				
	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.		Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	3.4	5.9	+2.5	-1.1	Q10a: Frequency of introduction of new models?	3.7	4.9	+1.2	-2.1
Q8b: The reasonableness of the finance targets set by your manufacturer?	3.6	6.2	+2.6	-1.0	Q10b: Product value and pricing?	3.9	4.6	+0.7	-2.1
Q8c: The earnings potential of your manufacturer's finance programme?	3.3	5.5	+2.2	-0.8	Q10c: Product advertising?	3.6	4.8	+1.2	-2.0
Q8d: The support you receive from your manufacturer's finance house?	3.5	5.4	+1.9	-1.6	Question 11 - Electric vehicle/Plug-in vehicles				
Question 9 - Dealer/Manufacturer relationships					Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	4.0	6.0	+2.0	-1.2	Q11a: Battery Electric Vehicle products your manufacturer currently offers?	3.3	3.8	+0.5	-2.3
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	3.4	5.9	+2.5	-0.8	Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	3.5	5.3	+1.8	-1.6
Q9c: Your manufacturer's dealer council/franchise board?	5.6	6.7	+1.1	-0.2	Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	3.7	4.8	+1.1	-1.8
Q9d: Your manufacturer's response to your communications with them?	3.6	5.9	+2.3	-0.9	Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	3.2	4.7	+1.5	-0.7
Q9e: Your manufacturer dealer standards are fair and reasonable?	3.5	5.9	+2.4	-1.1	Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	3.1	4.9	+1.8	-0.6
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	3.5	5.7	+2.2	-0.8	Q11f: With your manufacturer's support with on-site EV charging infrastructure?	2.9	4.3	+1.4	-0.9
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	3.3	6.0	+2.7	-0.8	Q11g: That your manufacturer's Electric Vehicle charging information and training equips your customers to successfully transition to an EV?		4.8	-	-1.4
Q9h: The value of manufacturer field staff to your business?	2.7	6.0	+3.3	-0.8	Question 12 & 13 - Overall Rating				
Q9i: The quality of your manufacturer's training?	4.7	5.9	+1.2	-1.2	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9j: The cost of manufacturer's training?	3.8	5.7	+1.9	-0.7	Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	2.5	4.0	+1.5	-2.7
Q9k: Your manufacturer's apprenticeship programme?	5.1	6.2	+1.1	-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?	2.7	3.6	+0.9	-2.9
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	3.2	5.3	+2.1	-1.2					

Overall Manufacturer Rating

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

Summer 2023

6.3

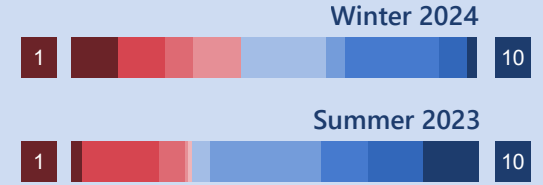
Winter 2024

5.3

Ranking vs. Summer 23
25 vs. 15

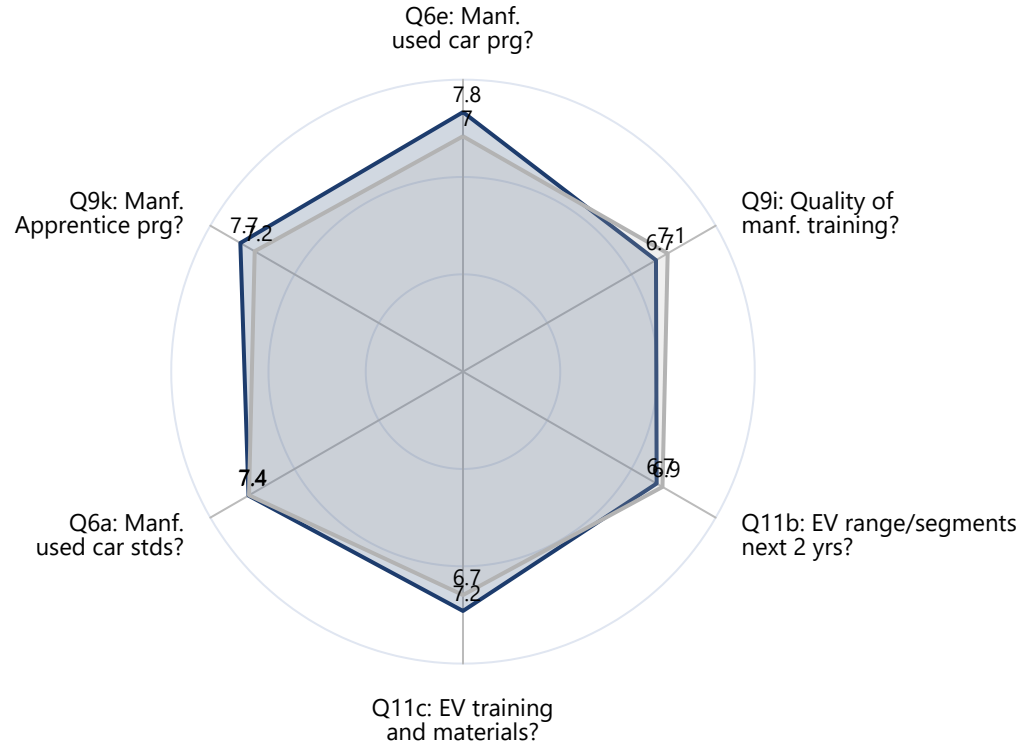
% Change
-15.9%

Score Change
-1.0 pts



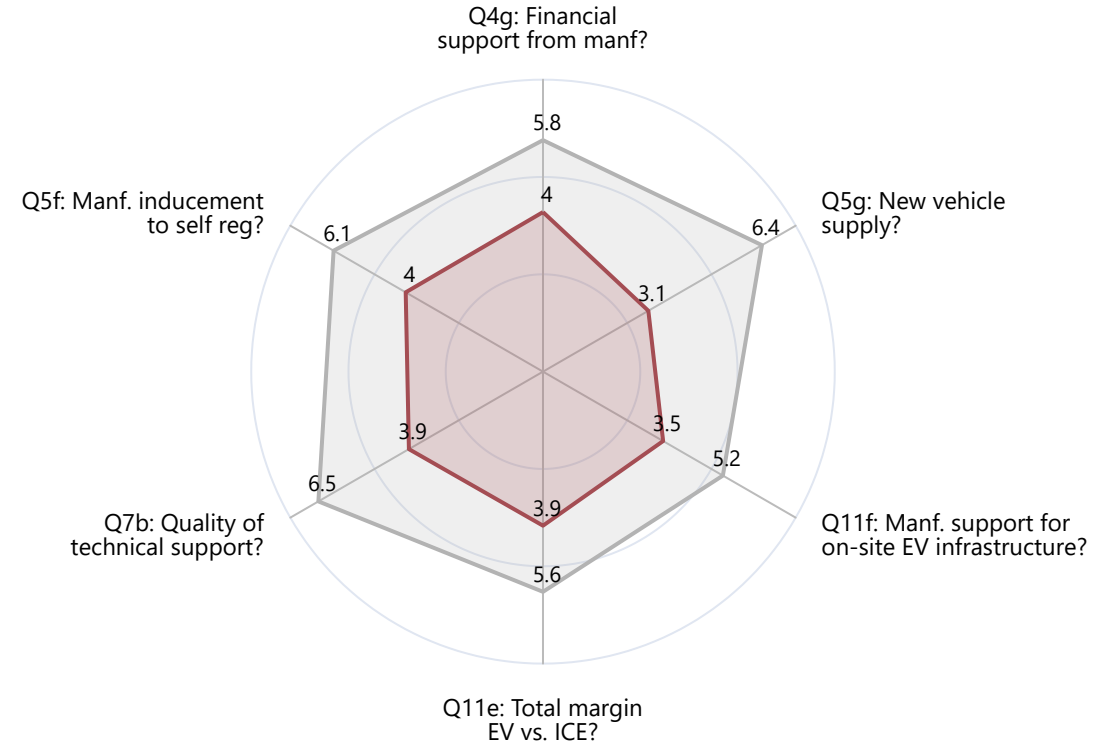
Top 6 Questions vs Average

Brand 2024 ● | Average 2024 ●



Bottom 6 Questions vs Average

Brand 2024 ● | Average 2024 ●



Question 4 - Value of the franchise	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	6.9	4.7	-2.2	-1.4
Q4b: The future profit return from representing your franchise?	5.3	4.4	-0.9	-1.7
Q4c: The required level of capital investment?	5.9	4.9	-1.0	-1.4
Q4d: The cost required in your dealership to meet franchised standards?	5.5	4.7	-0.8	-1.5
Q4e: The return on capital for your dealership?	5.9	4.6	-1.3	-1.4
Q4f: The quality of guidance provided by your manufacturer to your dealership?	6.0	5.0	-1.0	-1.3
Q4g: The financial support available to your dealership from your manufacturer?	5.8	4.0	-1.8	-1.8

Question 6 - Used car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	7.0	7.4	+0.4	+0.0
Q6b: The targets set by your manufacturer for used cars?	5.7	6.6	+0.9	-0.7
Q6c: The cost and quality of your manufacturer's used car warranties?	6.1	6.2	+0.1	-0.7
Q6d: Your total margin on used car sales?	5.9	5.5	-0.4	-1.4
Q6e: Your manufacturer's used car programme?	6.5	7.8	+1.3	+0.7
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	5.6	6.3	+0.7	-0.6

Question 5 - New car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	5.7	4.9	-0.8	-1.3
Q5b: Your new car targeting process?	5.4	4.2	-1.2	-1.9
Q5c: Your ability to meet your manufacturers new car targets in the current market conditions?		4.4	-	-1.5
Q5d: Your total margin on new vehicles?	5.8	4.2	-1.6	-1.9
Q5e: Your current bonus and rebate rates on new car sales?	6.2	4.5	-1.7	-1.6
Q5f: Manufacturer inducement to self register vehicles?	5.3	4.0	-1.3	-2.1
Q5g: Manufacturer's new vehicle supply?	5.3	3.1	-2.2	-3.3
Q5h: The fairness of your manufacturer's new car ordering and stocking policies?	5.7	4.2	-1.5	-2.3
Q5i: The fairness of your manufacturer's demonstrator programme?	4.8	5.0	+0.2	-1.4
Q5j: The affect the ZEV Mandate is having on obtaining new vehicles for customer orders?		4.0	-	-2.3

Question 7 - Aftersales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	6.5	5.7	-0.8	-1.0
Q7b: Quality of technical support?	5.7	3.9	-1.8	-2.6
Q7c: Availability of parts?	5.3	4.1	-1.2	-2.0
Q7d: Price of manufacturer parts compared with parts factors?	4.9	4.1	-0.8	-1.8
Q7e: Service profitability earnings?	6.3	5.3	-1.0	-1.3
Q7f: Manufacturer service plan rates and recovery?	5.6	5.9	+0.3	-0.6
Q7g: The fairness of your manufacturer's warranty policy for you and your customers?	6.3	5.2	-1.1	-1.7
Q7h: Your manufacturer's stocking policy for parts/accessories?	6.1	6.0	-0.1	-1.0

Question 8 - Finance					Question 10 - Product and marketing				
	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.		Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	6.5	5.3	-1.2	-1.7	Q10a: Frequency of introduction of new models?	7.0	6.4	-0.6	-0.6
Q8b: The reasonableness of the finance targets set by your manufacturer?	6.9	5.7	-1.2	-1.5	Q10b: Product value and pricing?	7.0	6.1	-0.9	-0.6
Q8c: The earnings potential of your manufacturer's finance programme?	6.9	6.2	-0.7	-0.1	Q10c: Product advertising?	7.1	5.6	-1.5	-1.1
Q8d: The support you receive from your manufacturer's finance house?	6.5	5.2	-1.3	-1.7	Question 11 - Electric vehicle/Plug-in vehicles				
Question 9 - Dealer/Manufacturer relationships					Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	6.4	5.3	-1.1	-1.8	Q11a: Battery Electric Vehicle products your manufacturer currently offers?	6.4	6.5	+0.1	+0.4
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	5.7	4.6	-1.1	-2.1	Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	7.0	6.7	-0.3	-0.2
Q9c: Your manufacturer's dealer council/franchise board?	6.4	5.2	-1.2	-1.6	Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	6.5	7.2	+0.7	+0.5
Q9d: Your manufacturer's response to your communications with them?	6.1	5.2	-0.9	-1.7	Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	4.8	4.4	-0.4	-1.0
Q9e: Your manufacturer dealer standards are fair and reasonable?	6.2	6.0	-0.2	-1.0	Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	4.9	3.9	-1.0	-1.7
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	6.0	5.1	-0.9	-1.4	Q11f: With your manufacturer's support with on-site EV charging infrastructure?	4.3	3.5	-0.8	-1.7
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	6.4	5.8	-0.6	-1.1	Q11g: That your manufacturer's Electric Vehicle charging information and training equips your customers to successfully transition to an EV?		5.8	-	-0.4
Q9h: The value of manufacturer field staff to your business?	6.3	6.5	+0.2	-0.4	Question 12 & 13 - Overall Rating				
Q9i: The quality of your manufacturer's training?	6.8	6.7	-0.1	-0.4	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9j: The cost of manufacturer's training?	6.0	4.5	-1.5	-1.8	Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	6.3	5.3	-1.0	-1.3
Q9k: Your manufacturer's apprenticeship programme?	7.3	7.7	+0.4	+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?	6.9	5.2	-1.7	-1.3
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	5.6	5.4	-0.2	-1.1					

Overall Manufacturer Rating

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

Summer 2023

8.7

Winter 2024

8.4

Ranking vs. Summer 23
4 vs. 4

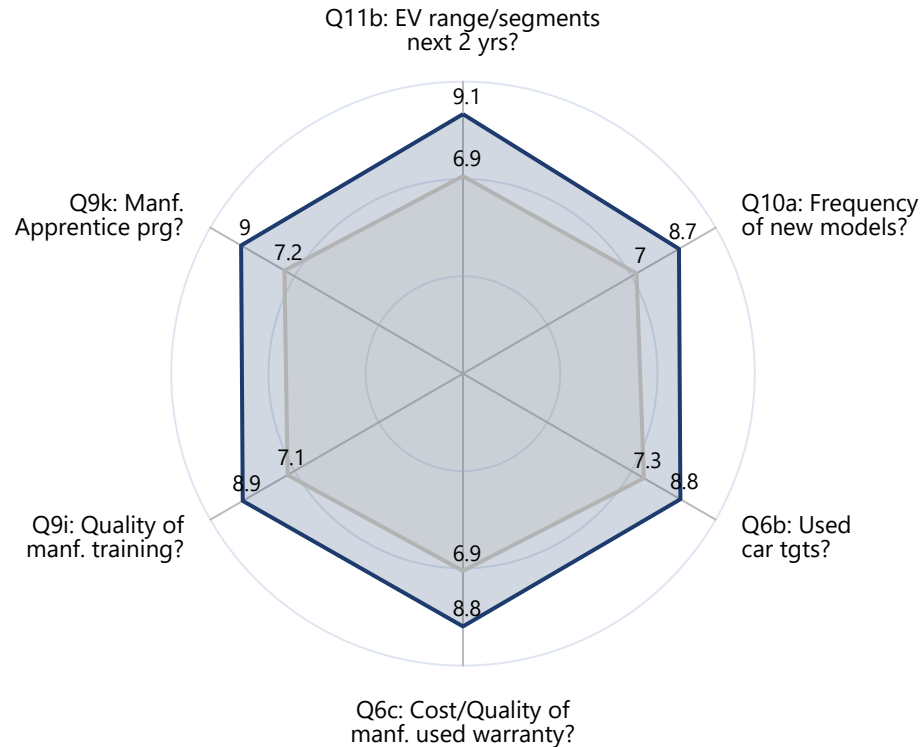
% Change
-3.4%

Score Change
-0.3 pts



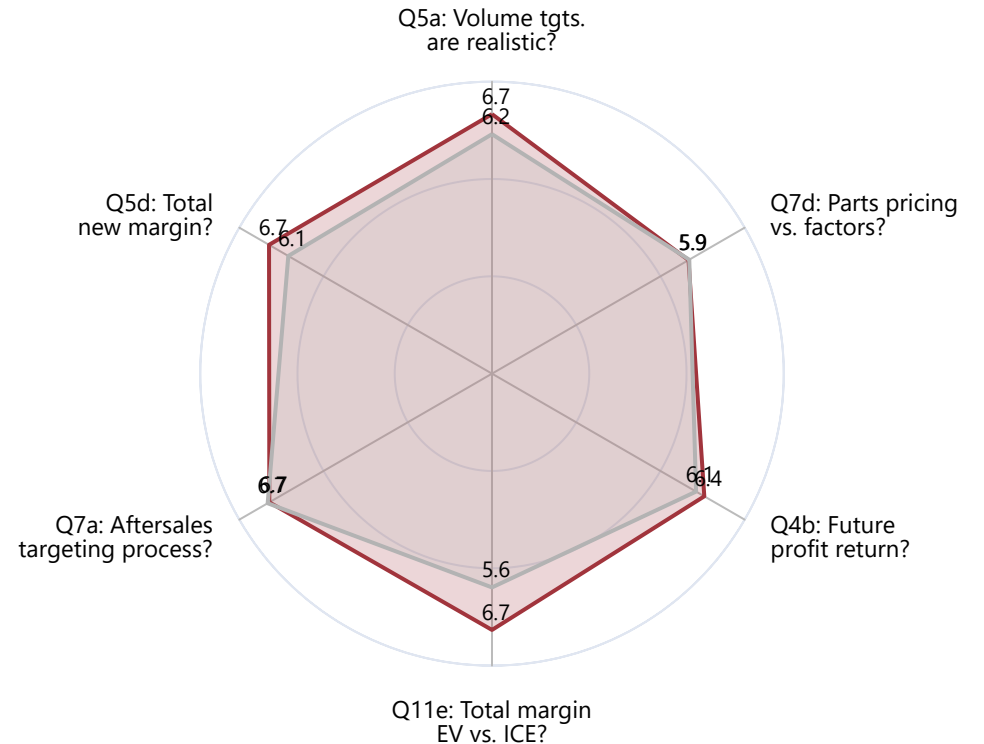
Top 6 Questions vs Average

Brand 2024 ● | Average 2024 ●



Bottom 6 Questions vs Average

Brand 2024 ● | Average 2024 ●



Question 4 - Value of the franchise	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	8.3	7.7	-0.6	+1.6
Q4b: The future profit return from representing your franchise?	7.0	6.4	-0.6	+0.2
Q4c: The required level of capital investment?	7.1	7.2	+0.1	+0.9
Q4d: The cost required in your dealership to meet franchised standards?	6.9	6.8	-0.1	+0.6
Q4e: The return on capital for your dealership?	7.6	7.7	+0.1	+1.8
Q4f: The quality of guidance provided by your manufacturer to your dealership?	8.2	8.2	0.0	+1.8
Q4g: The financial support available to your dealership from your manufacturer?	7.6	8.0	+0.4	+2.2

Question 6 - Used car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	7.9	8.3	+0.4	+0.9
Q6b: The targets set by your manufacturer for used cars?	8.4	8.8	+0.4	+1.5
Q6c: The cost and quality of your manufacturer's used car warranties?	8.6	8.8	+0.2	+1.9
Q6d: Your total margin on used car sales?	8.1	7.4	-0.7	+0.5
Q6e: Your manufacturer's used car programme?	8.4	8.5	+0.1	+1.5
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	8.1	8.0	-0.1	+1.1

Question 5 - New car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	7.7	6.7	-1.0	+0.5
Q5b: Your new car targeting process?	7.6	6.8	-0.8	+0.7
Q5c: Your ability to meet your manufacturers new car targets in the current market conditions?		6.9	-	+1.0
Q5d: Your total margin on new vehicles?	7.7	6.7	-1.0	+0.6
Q5e: Your current bonus and rebate rates on new car sales?	7.6	7.2	-0.4	+1.0
Q5f: Manufacturer inducement to self register vehicles?	7.6	7.6	0.0	+1.5
Q5g: Manufacturer's new vehicle supply?	6.6	7.5	+0.9	+1.1
Q5h: The fairness of your manufacturer's new car ordering and stocking policies?	7.8	7.7	-0.1	+1.2
Q5i: The fairness of your manufacturer's demonstrator programme?	8.1	7.2	-0.9	+0.8
Q5j: The affect the ZEV Mandate is having on obtaining new vehicles for customer orders?		7.7	-	+1.4

Question 7 - Aftersales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	7.1	6.7	-0.4	-0.0
Q7b: Quality of technical support?	7.8	7.6	-0.2	+1.0
Q7c: Availability of parts?	7.3	7.1	-0.2	+1.0
Q7d: Price of manufacturer parts compared with parts factors?	6.4	5.9	-0.5	-0.0
Q7e: Service profitability earnings?	7.7	8.1	+0.4	+1.4
Q7f: Manufacturer service plan rates and recovery?	7.2	7.1	-0.1	+0.6
Q7g: The fairness of your manufacturer's warranty policy for you and your customers?	8.2	8.3	+0.1	+1.4
Q7h: Your manufacturer's stocking policy for parts/accessories?	7.9	7.3	-0.6	+0.3

Question 8 - Finance					Question 10 - Product and marketing				
	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.		Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	6.9	7.4	+0.5	+0.4	Q10a: Frequency of introduction of new models?	8.6	8.7	+0.1	+1.7
Q8b: The reasonableness of the finance targets set by your manufacturer?	7.5	7.9	+0.4	+0.6	Q10b: Product value and pricing?	7.5	7.5	0.0	+0.9
Q8c: The earnings potential of your manufacturer's finance programme?	6.9	7.8	+0.9	+1.5	Q10c: Product advertising?	7.5	8.2	+0.7	+1.5
Q8d: The support you receive from your manufacturer's finance house?	7.1	7.3	+0.2	+0.4	Question 11 - Electric vehicle/Plug-in vehicles				
Question 9 - Dealer/Manufacturer relationships					Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	8.6	8.6	0.0	+1.5	Q11a: Battery Electric Vehicle products your manufacturer currently offers?	7.8	8.5	+0.7	+2.4
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	8.2	8.1	-0.1	+1.5	Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	8.5	9.1	+0.6	+2.2
Q9c: Your manufacturer's dealer council/franchise board?	7.9	8.1	+0.2	+1.2	Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	8.3	8.7	+0.4	+2.0
Q9d: Your manufacturer's response to your communications with them?	8.1	8.5	+0.4	+1.7	Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	7.2	6.9	-0.3	+1.4
Q9e: Your manufacturer dealer standards are fair and reasonable?	8.1	8.7	+0.6	+1.7	Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	7.1	6.7	-0.4	+1.1
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	7.7	8.1	+0.4	+1.6	Q11f: With your manufacturer's support with on-site EV charging infrastructure?	7.5	7.5	0.0	+2.3
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	8.1	8.3	+0.2	+1.5	Q11g: That your manufacturer's Electric Vehicle charging information and training equips your customers to successfully transition to an EV?		8.3	-	+2.1
Q9h: The value of manufacturer field staff to your business?	8.4	7.7	-0.7	+0.9	Question 12 & 13 - Overall Rating				
Q9i: The quality of your manufacturer's training?	8.7	8.9	+0.2	+1.8	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9j: The cost of manufacturer's training?	7.8	7.6	-0.2	+1.3	Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	8.7	8.4	-0.3	+1.7
Q9k: Your manufacturer's apprenticeship programme?	8.8	9.0	+0.2	+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?	8.7	8.5	-0.2	+1.9
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	7.9	7.9	0.0	+1.4					

Overall Manufacturer Rating

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

Summer 2023

2.6

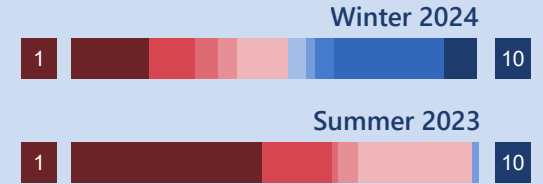
Winter 2024

5.4

Ranking vs. Summer 23
24 vs. 28

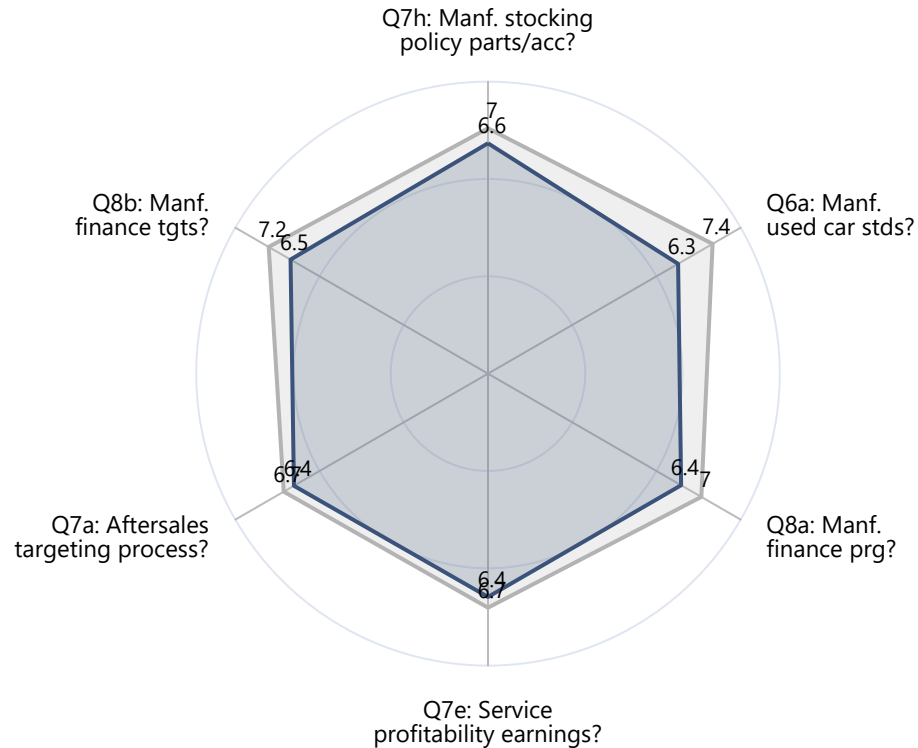
% Change
+107.7%

Score Change
+2.8 pts



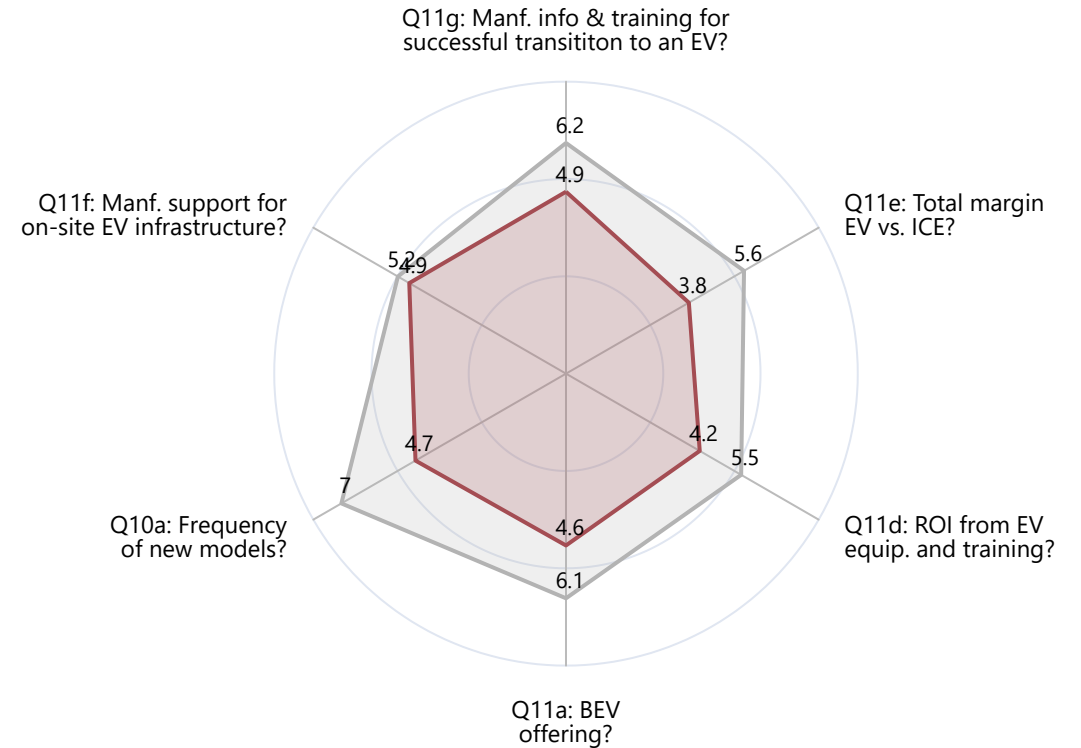
Top 6 Questions vs Average

Brand 2024 ● Average 2024 ●



Bottom 6 Questions vs Average

Brand 2024 ● Average 2024 ●



Question 4 - Value of the franchise	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	2.2	5.1	+2.9	-1.0
Q4b: The future profit return from representing your franchise?	2.3	5.4	+3.1	-0.7
Q4c: The required level of capital investment?	2.9	5.5	+2.6	-0.8
Q4d: The cost required in your dealership to meet franchised standards?	2.8	5.6	+2.8	-0.6
Q4e: The return on capital for your dealership?	2.3	5.0	+2.7	-0.9
Q4f: The quality of guidance provided by your manufacturer to your dealership?	2.3	5.2	+2.9	-1.2
Q4g: The financial support available to your dealership from your manufacturer?	2.5	5.1	+2.6	-0.7

Question 6 - Used car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	4.2	6.3	+2.1	-1.1
Q6b: The targets set by your manufacturer for used cars?	3.9	5.9	+2.0	-1.4
Q6c: The cost and quality of your manufacturer's used car warranties?	4.0	5.3	+1.3	-1.6
Q6d: Your total margin on used car sales?	4.4	6.1	+1.7	-0.8
Q6e: Your manufacturer's used car programme?	4.4	5.9	+1.5	-1.2
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	4.4	6.0	+1.6	-0.9

Question 5 - New car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	2.9	5.4	+2.5	-0.8
Q5b: Your new car targeting process?	2.9	5.2	+2.3	-0.9
Q5c: Your ability to meet your manufacturers new car targets in the current market conditions?		5.3	-	-0.6
Q5d: Your total margin on new vehicles?	2.5	5.8	+3.3	-0.3
Q5e: Your current bonus and rebate rates on new car sales?	2.5	6.1	+3.6	-0.1
Q5f: Manufacturer inducement to self register vehicles?	3.1	5.3	+2.2	-0.8
Q5g: Manufacturer's new vehicle supply?	3.2	5.9	+2.7	-0.5
Q5h: The fairness of your manufacturer's new car ordering and stocking policies?	3.0	5.8	+2.8	-0.7
Q5i: The fairness of your manufacturer's demonstrator programme?	2.9	5.8	+2.9	-0.6
Q5j: The affect the ZEV Mandate is having on obtaining new vehicles for customer orders?		5.6	-	-0.8

Question 7 - Aftersales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	4.3	6.4	+2.1	-0.3
Q7b: Quality of technical support?	4.1	5.0	+0.9	-1.5
Q7c: Availability of parts?	3.3	5.2	+1.9	-0.9
Q7d: Price of manufacturer parts compared with parts factors?	3.8	5.8	+2.0	-0.1
Q7e: Service profitability earnings?	4.4	6.4	+2.0	-0.3
Q7f: Manufacturer service plan rates and recovery?	3.5	6.0	+2.5	-0.5
Q7g: The fairness of your manufacturer's warranty policy for you and your customers?	4.6	6.0	+1.4	-0.9
Q7h: Your manufacturer's stocking policy for parts/accessories?	3.9	6.6	+2.7	-0.4

Question 8 - Finance					Question 10 - Product and marketing				
	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.		Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	3.3	6.4	+3.1	-0.7	Q10a: Frequency of introduction of new models?	3.3	4.7	+1.4	-2.3
Q8b: The reasonableness of the finance targets set by your manufacturer?	3.4	6.5	+3.1	-0.7	Q10b: Product value and pricing?	3.6	5.8	+2.2	-0.8
Q8c: The earnings potential of your manufacturer's finance programme?	2.8	5.7	+2.9	-0.6	Q10c: Product advertising?	2.7	5.3	+2.6	-1.4
Q8d: The support you receive from your manufacturer's finance house?	3.0	6.1	+3.1	-0.8	Question 11 - Electric vehicle/Plug-in vehicles				
Question 9 - Dealer/Manufacturer relationships					Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	2.5	6.2	+3.7	-0.9	Q11a: Battery Electric Vehicle products your manufacturer currently offers?	2.7	4.6	+1.9	-1.4
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	2.4	5.9	+3.5	-0.8	Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	3.4	5.7	+2.3	-1.2
Q9c: Your manufacturer's dealer council/franchise board?	3.8	5.6	+1.8	-1.2	Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	3.1	5.3	+2.2	-1.4
Q9d: Your manufacturer's response to your communications with them?	2.4	5.8	+3.4	-1.0	Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	2.8	4.2	+1.4	-1.3
Q9e: Your manufacturer dealer standards are fair and reasonable?	3.0	5.9	+2.9	-1.0	Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	2.5	3.8	+1.3	-1.7
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	2.8	5.7	+2.9	-0.8	Q11f: With your manufacturer's support with on-site EV charging infrastructure?	2.0	4.9	+2.9	-0.4
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	2.7	5.8	+3.1	-1.0	Q11g: That your manufacturer's Electric Vehicle charging information and training equips your customers to successfully transition to an EV?		4.9	-	-1.3
Q9h: The value of manufacturer field staff to your business?	2.5	5.5	+3.0	-1.4	Question 12 & 13 - Overall Rating				
Q9i: The quality of your manufacturer's training?	5.0	5.8	+0.8	-1.3	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9j: The cost of manufacturer's training?	3.4	5.1	+1.7	-1.2	Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	2.6	5.4	+2.8	-1.2
Q9k: Your manufacturer's apprenticeship programme?	3.8	5.9	+2.1	-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?	2.5	5.0	+2.5	-1.5
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	2.4	5.0	+2.6	-1.4					

Overall Manufacturer Rating

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

Summer 2023

6.3

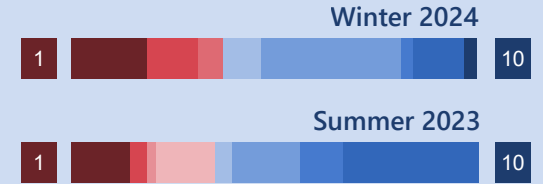
Winter 2024

5.3

Ranking vs. Summer 23
26 vs. 16

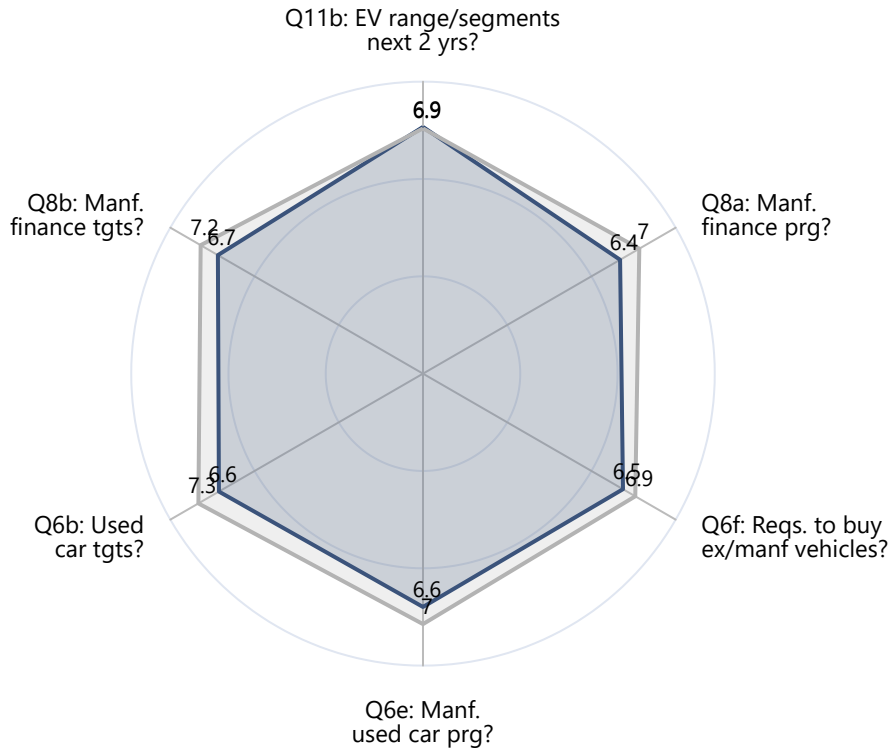
% Change
-15.9%

Score Change
-1.0 pts



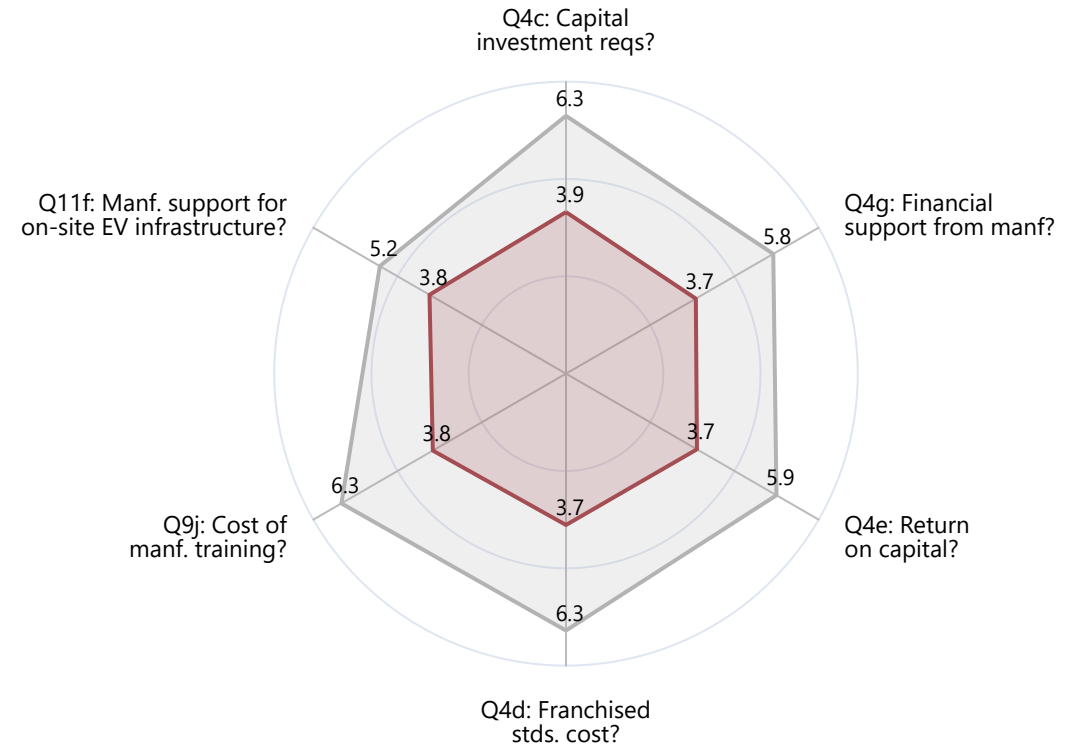
Top 6 Questions vs Average

Brand 2024 ● | Average 2024 ●



Bottom 6 Questions vs Average

Brand 2024 ● | Average 2024 ●



Question 4 - Value of the franchise	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	5.0	4.0	-1.0	-2.1
Q4b: The future profit return from representing your franchise?	6.1	5.1	-1.0	-1.0
Q4c: The required level of capital investment?	4.4	3.9	-0.5	-2.3
Q4d: The cost required in your dealership to meet franchised standards?	4.7	3.7	-1.0	-2.6
Q4e: The return on capital for your dealership?	4.9	3.7	-1.2	-2.2
Q4f: The quality of guidance provided by your manufacturer to your dealership?	6.0	4.4	-1.6	-2.0
Q4g: The financial support available to your dealership from your manufacturer?	5.3	3.7	-1.6	-2.2

Question 6 - Used car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	5.8	6.3	+0.5	-1.1
Q6b: The targets set by your manufacturer for used cars?	5.7	6.6	+0.9	-0.7
Q6c: The cost and quality of your manufacturer's used car warranties?	5.5	5.6	+0.1	-1.3
Q6d: Your total margin on used car sales?	5.9	6.1	+0.2	-0.9
Q6e: Your manufacturer's used car programme?	5.4	6.6	+1.2	-0.5
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	5.1	6.5	+1.4	-0.4

Question 5 - New car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	5.8	4.9	-0.9	-1.3
Q5b: Your new car targeting process?	5.9	5.2	-0.7	-0.9
Q5c: Your ability to meet your manufacturers new car targets in the current market conditions?		4.8	-	-1.0
Q5d: Your total margin on new vehicles?	5.2	4.4	-0.8	-1.7
Q5e: Your current bonus and rebate rates on new car sales?	5.0	4.3	-0.7	-1.8
Q5f: Manufacturer inducement to self register vehicles?	4.6	5.6	+1.0	-0.5
Q5g: Manufacturer's new vehicle supply?	4.6	4.6	0.0	-1.8
Q5h: The fairness of your manufacturer's new car ordering and stocking policies?	5.9	5.5	-0.4	-1.0
Q5i: The fairness of your manufacturer's demonstrator programme?	6.1	4.9	-1.2	-1.5
Q5j: The affect the ZEV Mandate is having on obtaining new vehicles for customer orders?		5.8	-	-0.5

Question 7 - Aftersales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	5.7	5.5	-0.2	-1.2
Q7b: Quality of technical support?	5.0	4.6	-0.4	-1.9
Q7c: Availability of parts?	5.3	4.5	-0.8	-1.6
Q7d: Price of manufacturer parts compared with parts factors?	5.8	4.3	-1.5	-1.6
Q7e: Service profitability earnings?	5.3	5.3	0.0	-1.4
Q7f: Manufacturer service plan rates and recovery?	5.5	5.3	-0.2	-1.2
Q7g: The fairness of your manufacturer's warranty policy for you and your customers?	5.6	5.6	0.0	-1.3
Q7h: Your manufacturer's stocking policy for parts/accessories?	6.3	5.9	-0.4	-1.1

Question 8 - Finance					Question 10 - Product and marketing				
	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.		Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	6.4	6.4	0.0	-0.6	Q10a: Frequency of introduction of new models?	6.4	5.6	-0.8	-1.4
Q8b: The reasonableness of the finance targets set by your manufacturer?	6.5	6.7	+0.2	-0.6	Q10b: Product value and pricing?	6.3	4.9	-1.4	-1.7
Q8c: The earnings potential of your manufacturer's finance programme?	5.4	5.8	+0.4	-0.5	Q10c: Product advertising?	6.7	5.9	-0.8	-0.9
Q8d: The support you receive from your manufacturer's finance house?	5.5	5.9	+0.4	-1.0	Question 11 - Electric vehicle/Plug-in vehicles				
Question 9 - Dealer/Manufacturer relationships					Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	6.4	5.2	-1.2	-1.9	Q11a: Battery Electric Vehicle products your manufacturer currently offers?	6.1	5.8	-0.3	-0.3
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	6.2	5.0	-1.2	-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	6.9	+0.1	+0.0
Q9c: Your manufacturer's dealer council/franchise board?	4.4	4.9	+0.5	-2.0	Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	6.8	5.8	-1.0	-0.8
Q9d: Your manufacturer's response to your communications with them?	5.8	5.4	-0.4	-1.5	Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	5.4	4.8	-0.6	-0.7
Q9e: Your manufacturer dealer standards are fair and reasonable?	6.5	4.9	-1.6	-2.0	Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	4.9	4.5	-0.4	-1.0
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	5.9	5.0	-0.9	-1.5	Q11f: With your manufacturer's support with on-site EV charging infrastructure?	4.4	3.8	-0.6	-1.4
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	6.4	5.2	-1.2	-1.6	Q11g: That your manufacturer's Electric Vehicle charging information and training equips your customers to successfully transition to an EV?		5.5	-	-0.7
Q9h: The value of manufacturer field staff to your business?	5.6	5.0	-0.6	-1.8	Question 12 & 13 - Overall Rating				
Q9i: The quality of your manufacturer's training?	5.9	5.9	0.0	-1.1	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9j: The cost of manufacturer's training?	5.8	3.8	-2.0	-2.6	Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	6.3	5.3	-1.0	-1.3
Q9k: Your manufacturer's apprenticeship programme?	5.9	5.8	-0.1	-1.5	Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	6.4	5.2	-1.2	-1.3
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	5.5	5.3	-0.2	-1.2					

Overall Manufacturer Rating

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

Summer 2023

7.6

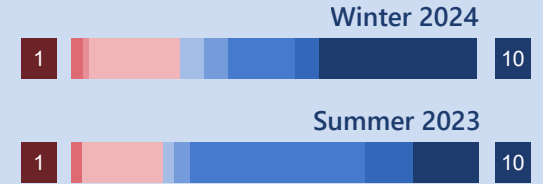
Winter 2024

7.8

Ranking vs. Summer 23
8 vs. 9

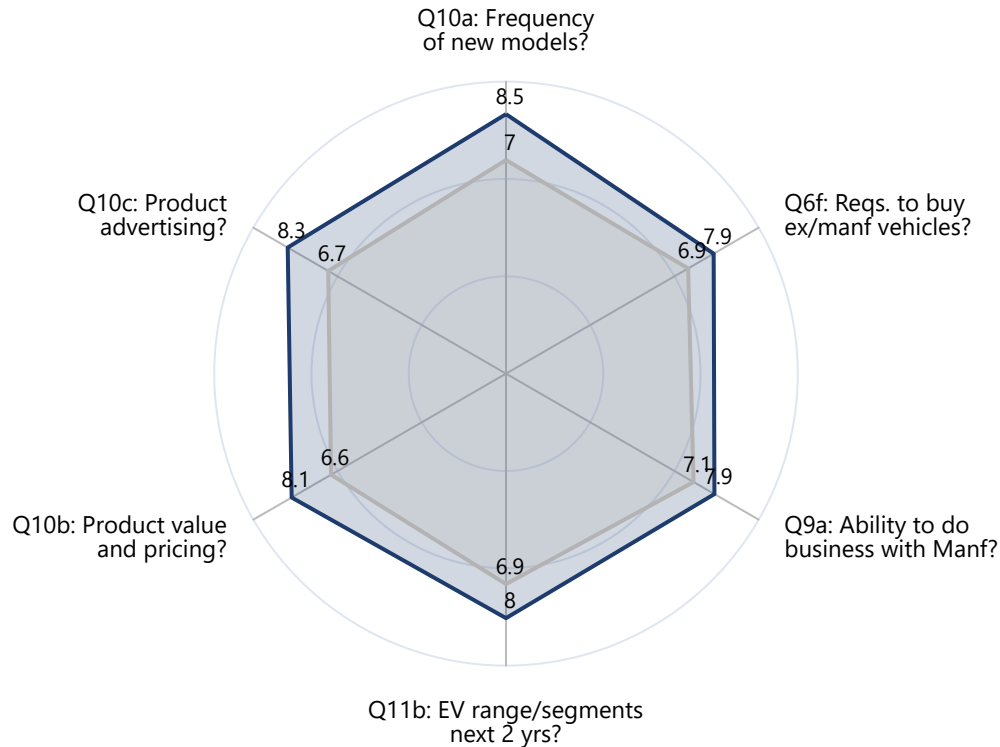
% Change
+2.6%

Score Change
+0.2 pts



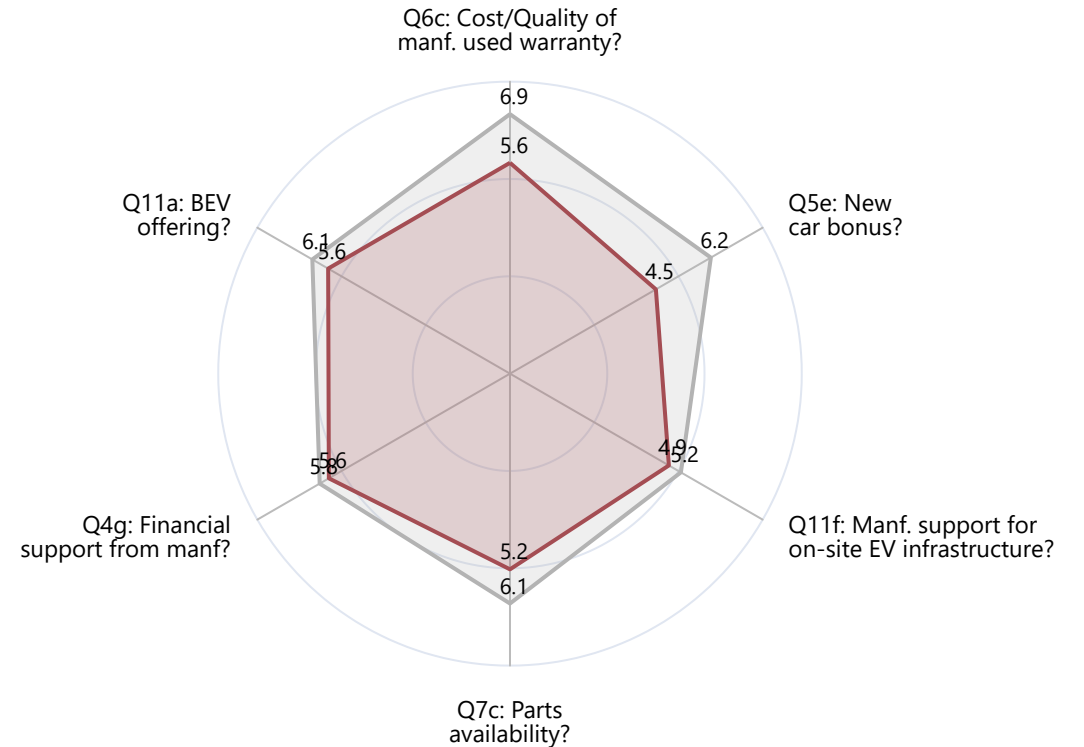
Top 6 Questions vs Average

Brand 2024 ● | Average 2024 ●



Bottom 6 Questions vs Average

Brand 2024 ● | Average 2024 ●



Question 4 - Value of the franchise	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	6.9	7.0	+0.1	+0.9
Q4b: The future profit return from representing your franchise?	7.2	7.7	+0.5	+1.6
Q4c: The required level of capital investment?	7.0	7.2	+0.2	+0.9
Q4d: The cost required in your dealership to meet franchised standards?	6.7	7.3	+0.6	+1.1
Q4e: The return on capital for your dealership?	7.2	7.2	0.0	+1.3
Q4f: The quality of guidance provided by your manufacturer to your dealership?	7.3	7.5	+0.2	+1.1
Q4g: The financial support available to your dealership from your manufacturer?	5.6	5.6	0.0	-0.3

Question 6 - Used car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	7.2	5.9	-1.3	-1.5
Q6b: The targets set by your manufacturer for used cars?	6.9		-6.9	
Q6c: The cost and quality of your manufacturer's used car warranties?	6.9	5.6	-1.3	-1.3
Q6d: Your total margin on used car sales?	7.2	7.0	-0.2	+0.0
Q6e: Your manufacturer's used car programme?	6.9	5.7	-1.2	-1.4
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	7.5	7.9	+0.4	+1.0

Question 5 - New car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	7.6	7.4	-0.2	+1.2
Q5b: Your new car targeting process?	7.7	7.5	-0.2	+1.5
Q5c: Your ability to meet your manufacturers new car targets in the current market conditions?		7.2	-	+1.3
Q5d: Your total margin on new vehicles?	5.7	5.8	+0.1	-0.3
Q5e: Your current bonus and rebate rates on new car sales?	4.5	4.5	0.0	-1.7
Q5f: Manufacturer inducement to self register vehicles?	7.9	7.3	-0.6	+1.2
Q5g: Manufacturer's new vehicle supply?	6.3	7.7	+1.4	+1.4
Q5h: The fairness of your manufacturer's new car ordering and stocking policies?	7.2	6.3	-0.9	-0.2
Q5i: The fairness of your manufacturer's demonstrator programme?	7.1	7.0	-0.1	+0.6
Q5j: The affect the ZEV Mandate is having on obtaining new vehicles for customer orders?		6.7	-	+0.3

Question 7 - Aftersales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	6.7	6.6	-0.1	-0.1
Q7b: Quality of technical support?	6.4	7.3	+0.9	+0.8
Q7c: Availability of parts?	3.9	5.2	+1.3	-0.9
Q7d: Price of manufacturer parts compared with parts factors?	5.9	5.7	-0.2	-0.3
Q7e: Service profitability earnings?	5.6	6.0	+0.4	-0.7
Q7f: Manufacturer service plan rates and recovery?	6.6	5.7	-0.9	-0.7
Q7g: The fairness of your manufacturer's warranty policy for you and your customers?	6.4	7.1	+0.7	+0.2
Q7h: Your manufacturer's stocking policy for parts/accessories?	6.1	7.0	+0.9	-0.0

Question 8 - Finance					Question 10 - Product and marketing				
	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.		Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	7.1	7.4	+0.3	+0.3	Q10a: Frequency of introduction of new models?	7.2	8.5	+1.3	+1.5
Q8b: The reasonableness of the finance targets set by your manufacturer?	7.6	7.4	-0.2	+0.2	Q10b: Product value and pricing?	8.6	8.1	-0.5	+1.5
Q8c: The earnings potential of your manufacturer's finance programme?	6.1	6.1	0.0	-0.2	Q10c: Product advertising?	8.2	8.3	+0.1	+1.5
Q8d: The support you receive from your manufacturer's finance house?	6.5	7.4	+0.9	+0.5	Question 11 - Electric vehicle/Plug-in vehicles				
Question 9 - Dealer/Manufacturer relationships					Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	7.6	7.9	+0.3	+0.8	Q11a: Battery Electric Vehicle products your manufacturer currently offers?	3.1	5.6	+2.5	-0.5
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	6.6	6.9	+0.3	+0.3	Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	6.5	8.0	+1.5	+1.1
Q9c: Your manufacturer's dealer council/franchise board?	6.8	6.6	-0.2	-0.3	Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	4.9	7.6	+2.7	+0.9
Q9d: Your manufacturer's response to your communications with them?	7.0	7.0	0.0	+0.2	Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	4.6	6.0	+1.4	+0.6
Q9e: Your manufacturer dealer standards are fair and reasonable?	7.2	6.7	-0.5	-0.3	Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	4.9	6.0	+1.1	+0.4
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	6.3	6.3	0.0	-0.2	Q11f: With your manufacturer's support with on-site EV charging infrastructure?	3.8	4.9	+1.1	-0.4
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	6.8	6.8	0.0	-0.1	Q11g: That your manufacturer's Electric Vehicle charging information and training equips your customers to successfully transition to an EV?		6.4	-	+0.2
Q9h: The value of manufacturer field staff to your business?	6.3	6.7	+0.4	-0.1	Question 12 & 13 - Overall Rating				
Q9i: The quality of your manufacturer's training?	7.5	7.3	-0.2	+0.3	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9j: The cost of manufacturer's training?	6.3	6.2	-0.1	-0.2	Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	7.6	7.8	+0.2	+1.2
Q9k: Your manufacturer's apprenticeship programme?	5.9	7.1	+1.2	-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?	7.6	7.8	+0.2	+1.2
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	6.9	6.8	-0.1	+0.3					

Overall Manufacturer Rating

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

Summer 2023

1.5

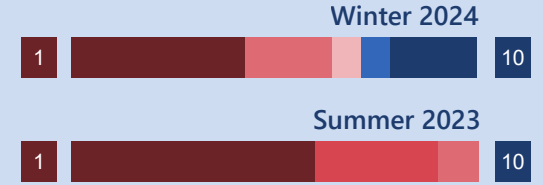
Winter 2024

4.2

Ranking vs. Summer 23
29 vs. 32

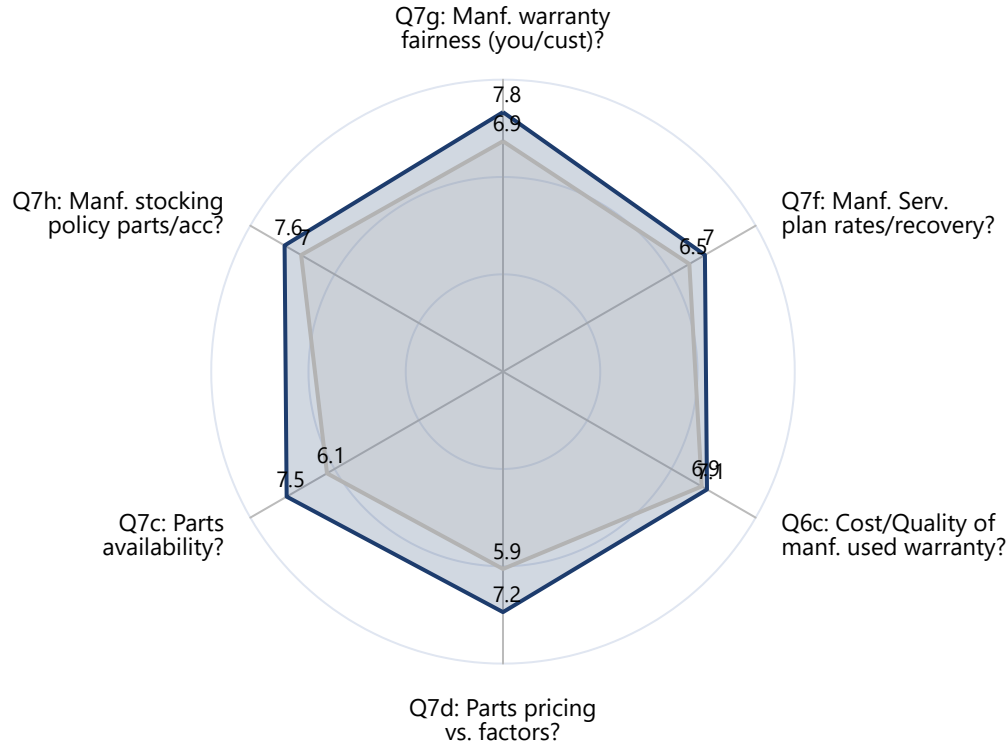
% Change
+180.0%

Score Change
+2.7 pts



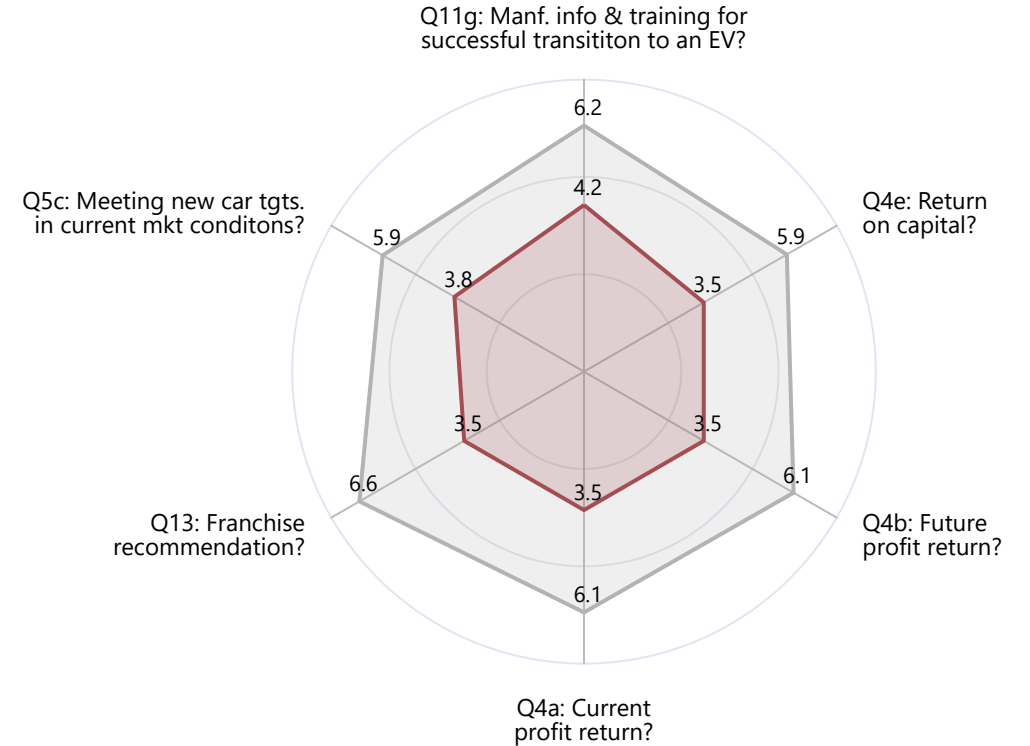
Top 6 Questions vs Average

Brand 2024 ● | Average 2024 ●



Bottom 6 Questions vs Average

Brand 2024 ● | Average 2024 ●



Question 4 - Value of the franchise	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	1.2	3.5	+2.3	-2.6
Q4b: The future profit return from representing your franchise?	1.3	3.5	+2.2	-2.6
Q4c: The required level of capital investment?	2.2	4.5	+2.3	-1.8
Q4d: The cost required in your dealership to meet franchised standards?	1.3	4.2	+2.9	-2.0
Q4e: The return on capital for your dealership?	1.0	3.5	+2.5	-2.4
Q4f: The quality of guidance provided by your manufacturer to your dealership?	1.8	4.2	+2.4	-2.2
Q4g: The financial support available to your dealership from your manufacturer?	1.1	5.9	+4.8	+0.0

Question 6 - Used car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	3.7	6.5	+2.8	-0.9
Q6b: The targets set by your manufacturer for used cars?	2.0	5.5	+3.5	-1.8
Q6c: The cost and quality of your manufacturer's used car warranties?	3.0	7.1	+4.1	+0.2
Q6d: Your total margin on used car sales?	3.9	6.2	+2.3	-0.7
Q6e: Your manufacturer's used car programme?	3.7	6.1	+2.4	-1.0
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	2.9	5.9	+3.0	-1.0

Question 5 - New car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	1.9	4.6	+2.7	-1.6
Q5b: Your new car targeting process?	1.7	4.3	+2.6	-1.7
Q5c: Your ability to meet your manufacturers new car targets in the current market conditions?		3.8	-	-2.1
Q5d: Your total margin on new vehicles?	3.2	4.9	+1.7	-1.3
Q5e: Your current bonus and rebate rates on new car sales?	2.1	4.2	+2.1	-1.9
Q5f: Manufacturer inducement to self register vehicles?	3.0	4.4	+1.4	-1.7
Q5g: Manufacturer's new vehicle supply?	3.0	5.3	+2.3	-1.1
Q5h: The fairness of your manufacturer's new car ordering and stocking policies?	4.6	5.4	+0.8	-1.1
Q5i: The fairness of your manufacturer's demonstrator programme?	2.8	4.8	+2.0	-1.6
Q5j: The affect the ZEV Mandate is having on obtaining new vehicles for customer orders?		4.4	-	-2.0

Question 7 - Aftersales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	4.0	5.9	+1.9	-0.8
Q7b: Quality of technical support?	3.5	5.8	+2.3	-0.8
Q7c: Availability of parts?	2.5	7.5	+5.0	+1.4
Q7d: Price of manufacturer parts compared with parts factors?	3.3	7.2	+3.9	+1.3
Q7e: Service profitability earnings?	2.8	6.8	+4.0	+0.1
Q7f: Manufacturer service plan rates and recovery?	3.3	7.0	+3.7	+0.5
Q7g: The fairness of your manufacturer's warranty policy for you and your customers?	3.3	7.8	+4.5	+0.9
Q7h: Your manufacturer's stocking policy for parts/accessories?	3.4	7.6	+4.2	+0.6

Question 8 - Finance					Question 10 - Product and marketing				
	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.		Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	3.9	5.6	+1.7	-1.4	Q10a: Frequency of introduction of new models?	4.4	5.1	+0.7	-1.9
Q8b: The reasonableness of the finance targets set by your manufacturer?	1.9	5.3	+3.4	-2.0	Q10b: Product value and pricing?	2.8	4.6	+1.8	-2.1
Q8c: The earnings potential of your manufacturer's finance programme?	2.1	5.1	+3.0	-1.3	Q10c: Product advertising?	1.5	4.3	+2.8	-2.4
Q8d: The support you receive from your manufacturer's finance house?	2.1	5.9	+3.8	-1.1	Question 11 - Electric vehicle/Plug-in vehicles				
Question 9 - Dealer/Manufacturer relationships					Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	2.6	6.4	+3.8	-0.7	Q11a: Battery Electric Vehicle products your manufacturer currently offers?	4.7	4.6	-0.1	-1.5
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	2.0	6.1	+4.1	-0.5	Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	5.3	5.4	+0.1	-1.5
Q9c: Your manufacturer's dealer council/franchise board?	4.0	5.9	+1.9	-1.0	Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	3.8	5.6	+1.8	-1.1
Q9d: Your manufacturer's response to your communications with them?	1.6	6.1	+4.5	-0.8	Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	1.8	4.3	+2.5	-1.2
Q9e: Your manufacturer dealer standards are fair and reasonable?	2.0	5.5	+3.5	-1.5	Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	2.3	4.5	+2.2	-1.1
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	2.4	5.6	+3.2	-0.9	Q11f: With your manufacturer's support with on-site EV charging infrastructure?	2.1	5.2	+3.1	-0.0
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	2.0	6.3	+4.3	-0.5	Q11g: That your manufacturer's Electric Vehicle charging information and training equips your customers to successfully transition to an EV?		4.2	-	-2.0
Q9h: The value of manufacturer field staff to your business?	2.8	5.4	+2.6	-1.5	Question 12 & 13 - Overall Rating				
Q9i: The quality of your manufacturer's training?	6.9	6.2	-0.7	-0.9	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9j: The cost of manufacturer's training?	1.6	4.6	+3.0	-1.7	Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	1.5	4.2	+2.7	-2.4
Q9k: Your manufacturer's apprenticeship programme?	7.0	6.0	-1.0	-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?	1.5	3.5	+2.0	-3.1
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	1.9	5.1	+3.2	-1.3					

Overall Manufacturer Rating

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

Summer 2023

2.6

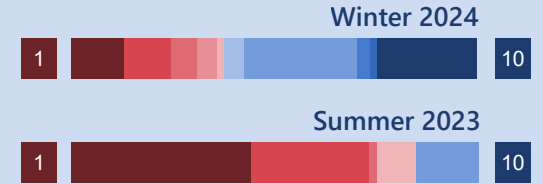
Winter 2024

6.0

Ranking vs. Summer 23
19 vs. 27

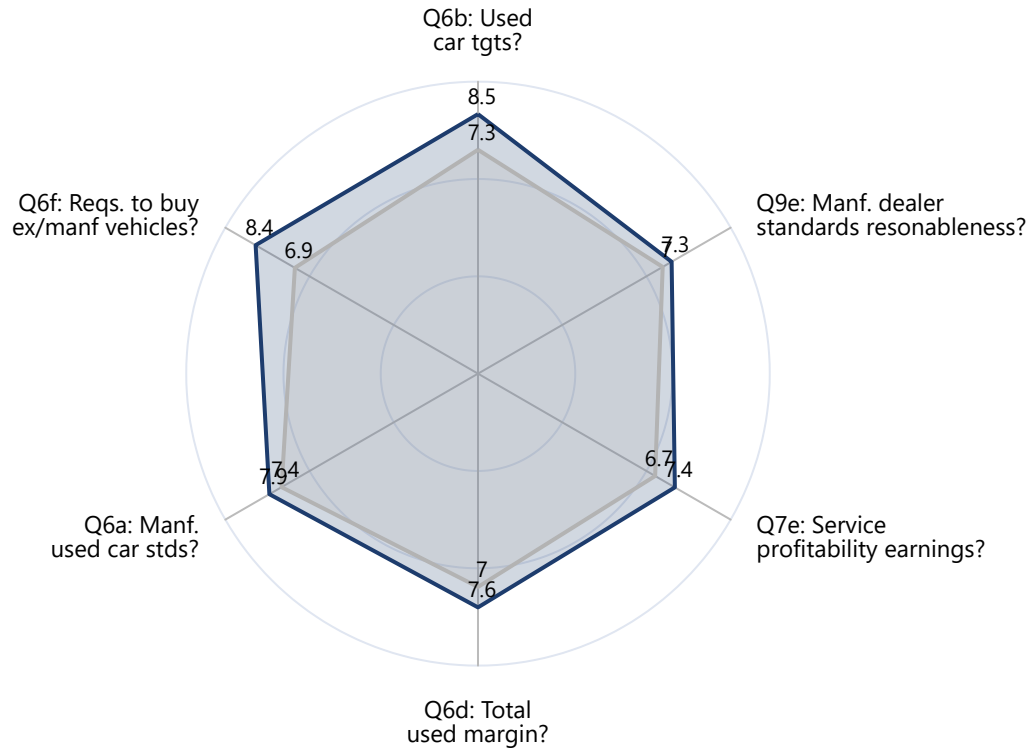
% Change
+130.8%

Score Change
+3.4 pts



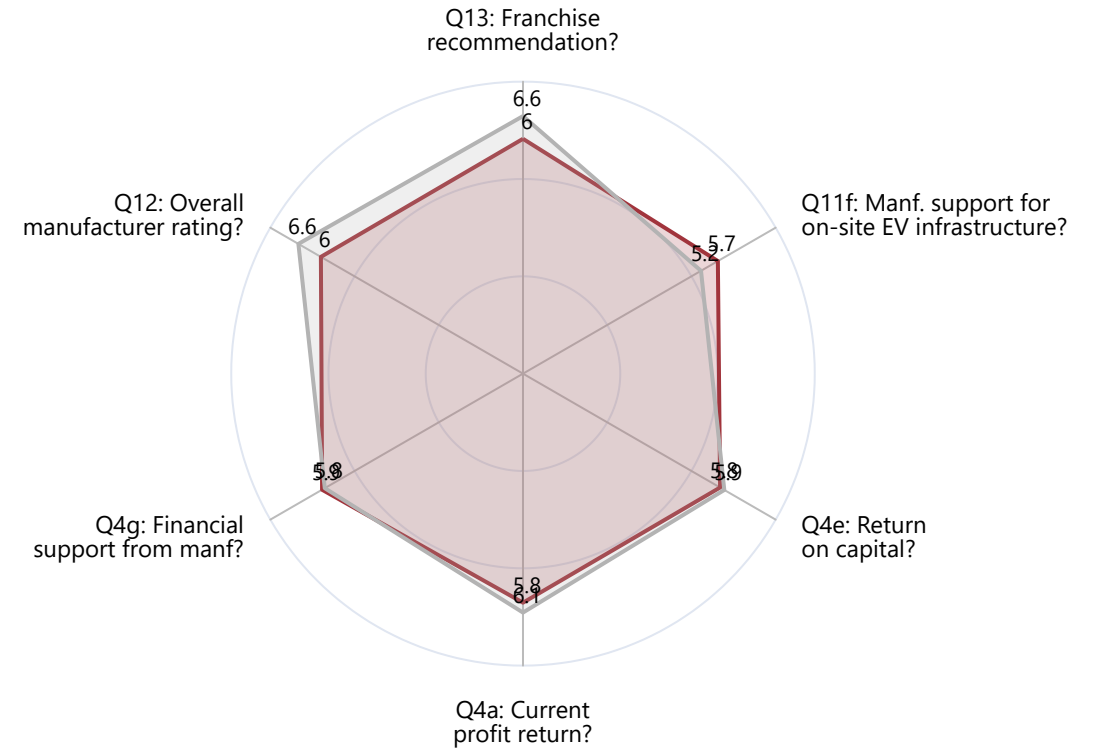
Top 6 Questions vs Average

Brand 2024 ● Average 2024 ●



Bottom 6 Questions vs Average

Brand 2024 ● Average 2024 ●



Question 4 - Value of the franchise	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	2.9	5.8	+2.9	-0.3
Q4b: The future profit return from representing your franchise?	3.5	6.2	+2.7	+0.1
Q4c: The required level of capital investment?	3.3	6.5	+3.2	+0.2
Q4d: The cost required in your dealership to meet franchised standards?	3.6	6.3	+2.7	+0.1
Q4e: The return on capital for your dealership?	3.0	5.8	+2.8	-0.1
Q4f: The quality of guidance provided by your manufacturer to your dealership?	2.8	6.2	+3.4	-0.2
Q4g: The financial support available to your dealership from your manufacturer?	3.0	5.9	+2.9	+0.1

Question 6 - Used car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	4.3	7.9	+3.6	+0.5
Q6b: The targets set by your manufacturer for used cars?	4.7	8.5	+3.8	+1.2
Q6c: The cost and quality of your manufacturer's used car warranties?	4.6	7.3	+2.7	+0.4
Q6d: Your total margin on used car sales?	6.0	7.6	+1.6	+0.7
Q6e: Your manufacturer's used car programme?	4.0	7.1	+3.1	+0.0
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	4.9	8.4	+3.5	+1.5

Question 5 - New car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	3.2	6.6	+3.4	+0.4
Q5b: Your new car targeting process?	3.1	6.4	+3.3	+0.4
Q5c: Your ability to meet your manufacturers new car targets in the current market conditions?		6.4	-	+0.5
Q5d: Your total margin on new vehicles?	3.0	6.7	+3.7	+0.6
Q5e: Your current bonus and rebate rates on new car sales?	2.9	6.6	+3.7	+0.4
Q5f: Manufacturer inducement to self register vehicles?	3.2	6.6	+3.4	+0.5
Q5g: Manufacturer's new vehicle supply?	4.1	6.8	+2.7	+0.4
Q5h: The fairness of your manufacturer's new car ordering and stocking policies?	2.7	6.4	+3.7	-0.2
Q5i: The fairness of your manufacturer's demonstrator programme?	4.4	6.5	+2.1	+0.2
Q5j: The affect the ZEV Mandate is having on obtaining new vehicles for customer orders?		6.8	-	+0.4

Question 7 - Aftersales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	4.2	7.1	+2.9	+0.4
Q7b: Quality of technical support?	3.8	6.2	+2.4	-0.3
Q7c: Availability of parts?	3.8	6.3	+2.5	+0.2
Q7d: Price of manufacturer parts compared with parts factors?	3.2	6.2	+3.0	+0.2
Q7e: Service profitability earnings?	4.8	7.4	+2.6	+0.7
Q7f: Manufacturer service plan rates and recovery?	3.9	6.2	+2.3	-0.2
Q7g: The fairness of your manufacturer's warranty policy for you and your customers?	3.7	7.0	+3.3	+0.1
Q7h: Your manufacturer's stocking policy for parts/accessories?	4.4	6.3	+1.9	-0.7

Question 8 - Finance					Question 10 - Product and marketing				
	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.		Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	2.9	6.8	+3.9	-0.2	Q10a: Frequency of introduction of new models?	3.3	6.6	+3.3	-0.4
Q8b: The reasonableness of the finance targets set by your manufacturer?	3.7	7.2	+3.5	-0.1	Q10b: Product value and pricing?	3.7	6.6	+2.9	+0.0
Q8c: The earnings potential of your manufacturer's finance programme?	3.5	6.7	+3.2	+0.3	Q10c: Product advertising?	3.2	6.6	+3.4	-0.1
Q8d: The support you receive from your manufacturer's finance house?	3.2	6.6	+3.4	-0.4	Question 11 - Electric vehicle/Plug-in vehicles				
Question 9 - Dealer/Manufacturer relationships					Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	3.9	7.0	+3.1	-0.1	Q11a: Battery Electric Vehicle products your manufacturer currently offers?	3.6	7.0	+3.4	+1.0
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	3.0	7.1	+4.1	+0.4	Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	4.1	7.1	+3.0	+0.2
Q9c: Your manufacturer's dealer council/franchise board?	4.3	6.6	+2.3	-0.3	Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	3.5	6.8	+3.3	+0.1
Q9d: Your manufacturer's response to your communications with them?	3.2	6.9	+3.7	+0.0	Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	3.1	6.2	+3.1	+0.7
Q9e: Your manufacturer dealer standards are fair and reasonable?	3.9	7.3	+3.4	+0.3	Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	3.3	6.1	+2.8	+0.6
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	3.6	7.0	+3.4	+0.5	Q11f: With your manufacturer's support with on-site EV charging infrastructure?	2.7	5.7	+3.0	+0.5
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	3.0	6.8	+3.8	-0.0	Q11g: That your manufacturer's Electric Vehicle charging information and training equips your customers to successfully transition to an EV?		6.6	-	+0.4
Q9h: The value of manufacturer field staff to your business?	3.1	6.9	+3.8	+0.1	Question 12 & 13 - Overall Rating				
Q9i: The quality of your manufacturer's training?	3.5	7.0	+3.5	-0.0	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9j: The cost of manufacturer's training?	3.0	6.8	+3.8	+0.4	Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	2.6	6.0	+3.4	-0.7
Q9k: Your manufacturer's apprenticeship programme?	4.7	7.1	+2.4	-0.2	Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	2.7	6.0	+3.3	-0.6
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	2.9	6.8	+3.9	+0.3					

Overall Manufacturer Rating

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

Summer 2023

4.3

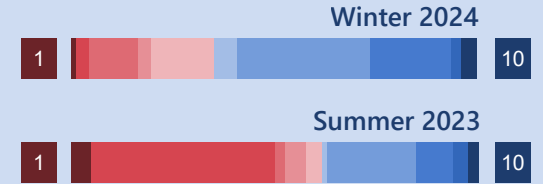
Winter 2024

6.2

Ranking vs. Summer 23
15 vs. 22

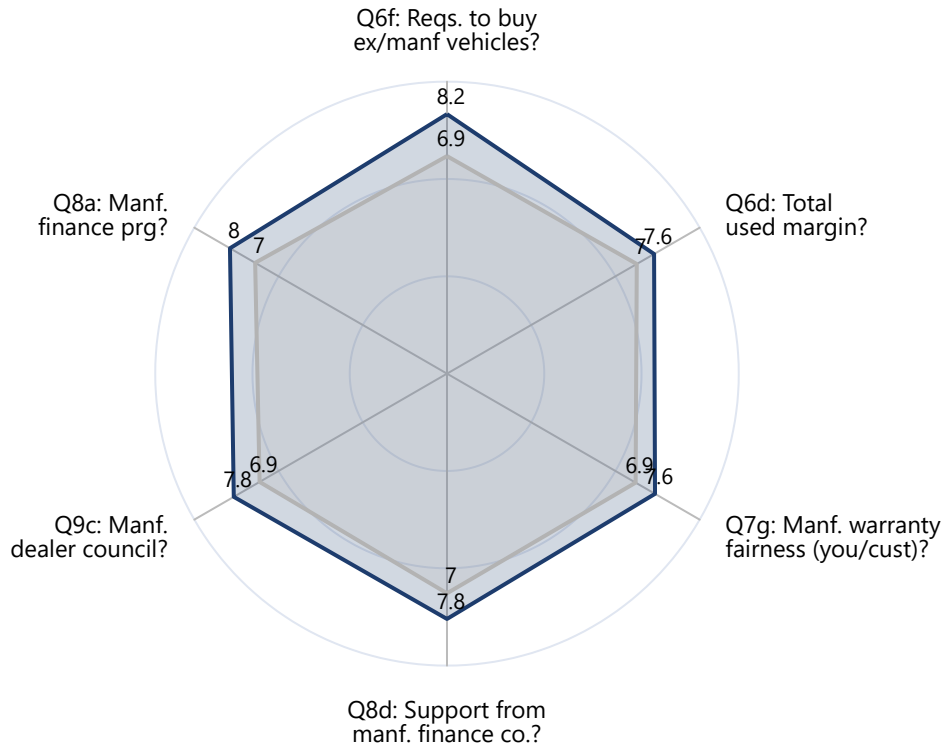
% Change
+44.2%

Score Change
+1.9 pts



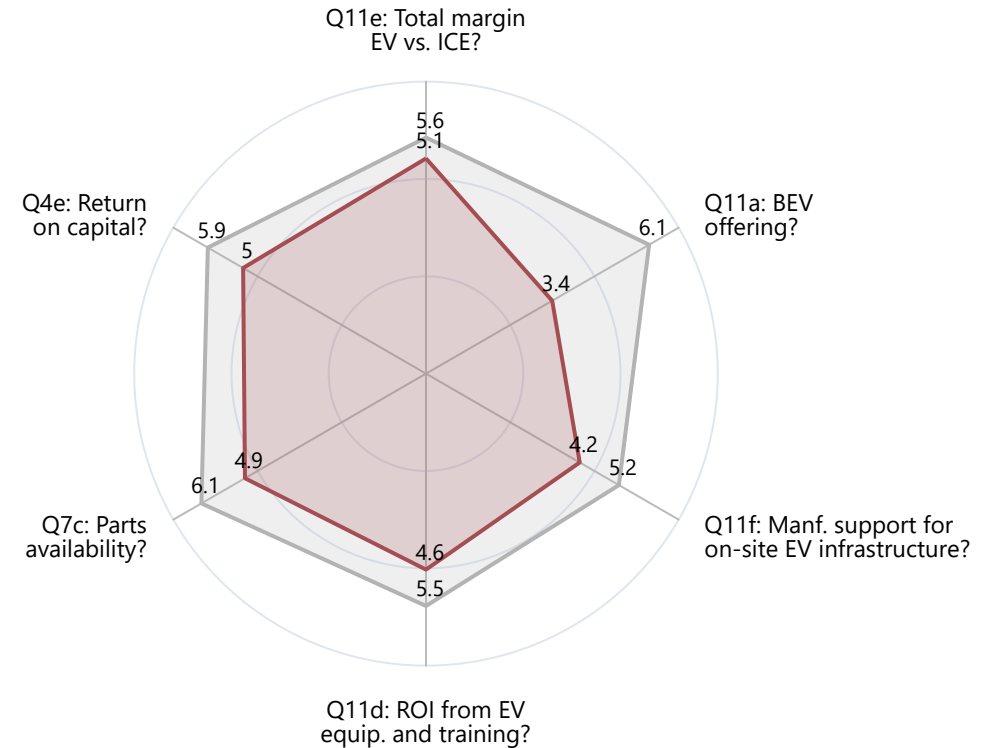
Top 6 Questions vs Average

Brand 2024 ● Average 2024 ●



Bottom 6 Questions vs Average

Brand 2024 ● Average 2024 ●



Question 4 - Value of the franchise	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	6.8	6.6	-0.2	+0.5
Q4b: The future profit return from representing your franchise?	4.9	5.7	+0.8	-0.4
Q4c: The required level of capital investment?	5.4	6.0	+0.6	-0.3
Q4d: The cost required in your dealership to meet franchised standards?	4.0	5.9	+1.9	-0.4
Q4e: The return on capital for your dealership?	5.3	5.0	-0.3	-1.0
Q4f: The quality of guidance provided by your manufacturer to your dealership?	4.5	5.7	+1.2	-0.7
Q4g: The financial support available to your dealership from your manufacturer?	4.8	5.1	+0.3	-0.8

Question 6 - Used car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	7.5	7.3	-0.2	-0.1
Q6b: The targets set by your manufacturer for used cars?	2.1	7.6	+5.5	+0.3
Q6c: The cost and quality of your manufacturer's used car warranties?	4.3	7.4	+3.1	+0.5
Q6d: Your total margin on used car sales?	7.5	7.6	+0.1	+0.6
Q6e: Your manufacturer's used car programme?	5.2	6.4	+1.2	-0.7
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	7.8	8.2	+0.4	+1.3

Question 5 - New car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	3.5	5.7	+2.2	-0.5
Q5b: Your new car targeting process?	5.7	5.6	-0.1	-0.4
Q5c: Your ability to meet your manufacturers new car targets in the current market conditions?		5.5	-	-0.4
Q5d: Your total margin on new vehicles?	5.1	6.1	+1.0	+0.0
Q5e: Your current bonus and rebate rates on new car sales?	5.3	6.4	+1.1	+0.2
Q5f: Manufacturer inducement to self register vehicles?	6.1	5.2	-0.9	-0.9
Q5g: Manufacturer's new vehicle supply?	2.8	5.9	+3.1	-0.5
Q5h: The fairness of your manufacturer's new car ordering and stocking policies?	3.1	5.7	+2.6	-0.8
Q5i: The fairness of your manufacturer's demonstrator programme?	5.5	6.0	+0.5	-0.4
Q5j: The affect the ZEV Mandate is having on obtaining new vehicles for customer orders?		5.9	-	-0.4

Question 7 - Aftersales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	4.3	6.5	+2.2	-0.2
Q7b: Quality of technical support?	4.1	6.3	+2.2	-0.2
Q7c: Availability of parts?	3.8	4.9	+1.1	-1.2
Q7d: Price of manufacturer parts compared with parts factors?	3.5	5.3	+1.8	-0.6
Q7e: Service profitability earnings?	4.1	6.7	+2.6	-0.0
Q7f: Manufacturer service plan rates and recovery?	3.8	6.3	+2.5	-0.1
Q7g: The fairness of your manufacturer's warranty policy for you and your customers?	4.5	7.6	+3.1	+0.7
Q7h: Your manufacturer's stocking policy for parts/accessories?	4.0	6.7	+2.7	-0.3

Question 8 - Finance					Question 10 - Product and marketing				
	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.		Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	6.7	8.0	+1.3	+0.9	Q10a: Frequency of introduction of new models?	4.6	5.5	+0.9	-1.5
Q8b: The reasonableness of the finance targets set by your manufacturer?	6.7	7.3	+0.6	+0.1	Q10b: Product value and pricing?	4.1	5.3	+1.2	-1.3
Q8c: The earnings potential of your manufacturer's finance programme?	6.4	6.8	+0.4	+0.5	Q10c: Product advertising?	4.6	6.2	+1.6	-0.6
Q8d: The support you receive from your manufacturer's finance house?	6.4	7.8	+1.4	+0.8	Question 11 - Electric vehicle/Plug-in vehicles				
Question 9 - Dealer/Manufacturer relationships					Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	4.6	6.9	+2.3	-0.2	Q11a: Battery Electric Vehicle products your manufacturer currently offers?	2.9	3.4	+0.5	-2.6
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	3.2	6.3	+3.1	-0.3	Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	6.1	6.6	+0.5	-0.3
Q9c: Your manufacturer's dealer council/franchise board?	7.4	7.8	+0.4	+0.9	Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	4.4	6.1	+1.7	-0.6
Q9d: Your manufacturer's response to your communications with them?	3.8	6.9	+3.1	+0.1	Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	3.2	4.6	+1.4	-0.9
Q9e: Your manufacturer dealer standards are fair and reasonable?	4.1	7.0	+2.9	+0.0	Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	2.9	5.1	+2.2	-0.5
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	4.1	5.4	+1.3	-1.1	Q11f: With your manufacturer's support with on-site EV charging infrastructure?	3.0	4.2	+1.2	-1.1
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	3.5	6.8	+3.3	-0.0	Q11g: That your manufacturer's Electric Vehicle charging information and training equips your customers to successfully transition to an EV?		5.8	-	-0.4
Q9h: The value of manufacturer field staff to your business?	4.0	6.0	+2.0	-0.9	Question 12 & 13 - Overall Rating				
Q9i: The quality of your manufacturer's training?	4.5	7.0	+2.5	-0.1	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9j: The cost of manufacturer's training?	4.2	6.3	+2.1	-0.1	Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	4.3	6.2	+1.9	-0.4
Q9k: Your manufacturer's apprenticeship programme?	4.2	7.0	+2.8	-0.2	Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	6.2	6.3	+0.1	-0.2
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	3.5	5.4	+1.9	-1.1					

Overall Manufacturer Rating

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

Summer 2023

7.1

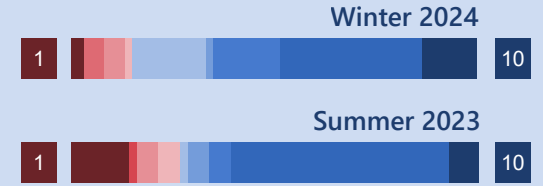
Winter 2024

7.5

Ranking vs. Summer 23
9 vs. 12

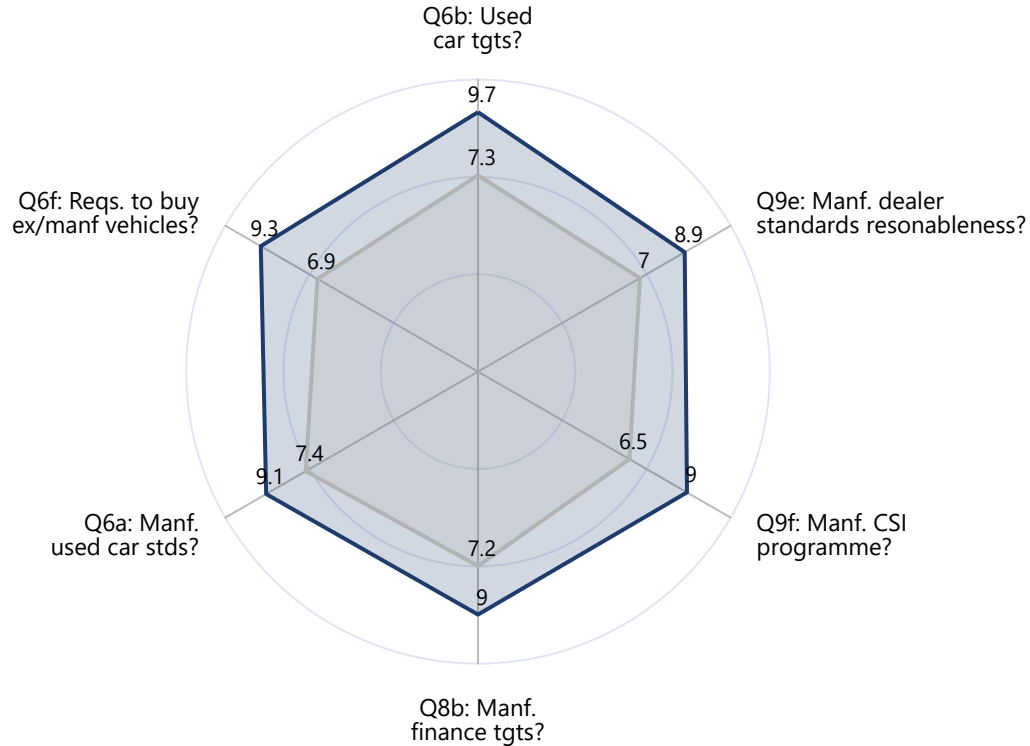
% Change
+5.6%

Score Change
+0.4 pts



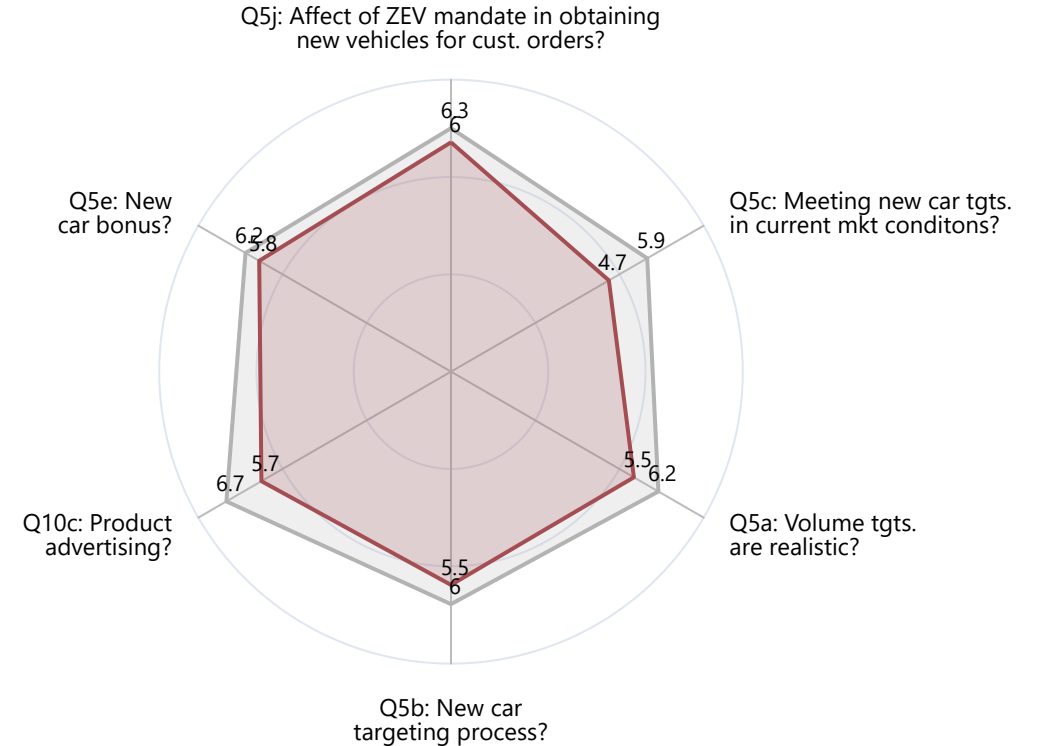
Top 6 Questions vs Average

Brand 2024 ● Average 2024 ●



Bottom 6 Questions vs Average

Brand 2024 ● Average 2024 ●



Question 4 - Value of the franchise	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	6.8	6.0	-0.8	-0.1
Q4b: The future profit return from representing your franchise?	6.7	6.8	+0.1	+0.7
Q4c: The required level of capital investment?	7.2	8.5	+1.3	+2.2
Q4d: The cost required in your dealership to meet franchised standards?	7.1	8.6	+1.5	+2.4
Q4e: The return on capital for your dealership?	7.3	6.6	-0.7	+0.7
Q4f: The quality of guidance provided by your manufacturer to your dealership?	6.5	7.0	+0.5	+0.6
Q4g: The financial support available to your dealership from your manufacturer?	6.8	7.2	+0.4	+1.3

Question 6 - Used car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	7.6	9.1	+1.5	+1.7
Q6b: The targets set by your manufacturer for used cars?	8.6	9.7	+1.1	+2.4
Q6c: The cost and quality of your manufacturer's used car warranties?	7.7	8.4	+0.7	+1.5
Q6d: Your total margin on used car sales?	8.0	8.7	+0.7	+1.7
Q6e: Your manufacturer's used car programme?	7.6	8.9	+1.3	+1.8
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	7.7	9.3	+1.6	+2.4

Question 5 - New car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	6.5	5.5	-1.0	-0.7
Q5b: Your new car targeting process?	6.6	5.5	-1.1	-0.5
Q5c: Your ability to meet your manufacturers new car targets in the current market conditions?		4.7	-	-1.1
Q5d: Your total margin on new vehicles?	6.6	6.2	-0.4	+0.1
Q5e: Your current bonus and rebate rates on new car sales?	6.8	5.8	-1.0	-0.4
Q5f: Manufacturer inducement to self register vehicles?	8.0	6.9	-1.1	+0.8
Q5g: Manufacturer's new vehicle supply?	5.9	6.7	+0.8	+0.3
Q5h: The fairness of your manufacturer's new car ordering and stocking policies?	7.1	8.6	+1.5	+2.0
Q5i: The fairness of your manufacturer's demonstrator programme?	7.1	8.2	+1.1	+1.8
Q5j: The affect the ZEV Mandate is having on obtaining new vehicles for customer orders?		6.0	-	-0.4

Question 7 - Aftersales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	6.9	7.9	+1.0	+1.2
Q7b: Quality of technical support?	6.3	7.1	+0.8	+0.5
Q7c: Availability of parts?	7.0	7.8	+0.8	+1.7
Q7d: Price of manufacturer parts compared with parts factors?	6.0	6.2	+0.2	+0.3
Q7e: Service profitability earnings?	7.3	8.0	+0.7	+1.3
Q7f: Manufacturer service plan rates and recovery?	7.2	7.6	+0.4	+1.1
Q7g: The fairness of your manufacturer's warranty policy for you and your customers?	7.3	7.3	0.0	+0.3
Q7h: Your manufacturer's stocking policy for parts/accessories?	7.1	8.3	+1.2	+1.3

Question 8 - Finance					Question 10 - Product and marketing				
	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.		Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	7.3	8.7	+1.4	+1.7	Q10a: Frequency of introduction of new models?	7.1	8.3	+1.2	+1.3
Q8b: The reasonableness of the finance targets set by your manufacturer?	7.8	9.0	+1.2	+1.8	Q10b: Product value and pricing?	6.0	6.4	+0.4	-0.3
Q8c: The earnings potential of your manufacturer's finance programme?	7.1	7.1	0.0	+0.7	Q10c: Product advertising?	5.5	5.7	+0.2	-1.0
Q8d: The support you receive from your manufacturer's finance house?	7.9	8.8	+0.9	+1.8	Question 11 - Electric vehicle/Plug-in vehicles				
Question 9 - Dealer/Manufacturer relationships					Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	7.1	8.3	+1.2	+1.2	Q11a: Battery Electric Vehicle products your manufacturer currently offers?	4.7	7.0	+2.3	+1.0
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	7.2	8.4	+1.2	+1.7	Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	6.3	6.5	+0.2	-0.4
Q9c: Your manufacturer's dealer council/franchise board?	7.4	8.8	+1.4	+1.9	Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	5.7	6.8	+1.1	+0.1
Q9d: Your manufacturer's response to your communications with them?	7.1	8.5	+1.4	+1.6	Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	5.3	6.5	+1.2	+1.0
Q9e: Your manufacturer dealer standards are fair and reasonable?	7.4	8.9	+1.5	+1.9	Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	5.5	6.4	+0.9	+0.9
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	7.4	9.0	+1.6	+2.5	Q11f: With your manufacturer's support with on-site EV charging infrastructure?	5.6	6.5	+0.9	+1.3
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	7.1	8.3	+1.2	+1.5	Q11g: That your manufacturer's Electric Vehicle charging information and training equips your customers to successfully transition to an EV?		7.0	-	+0.7
Q9h: The value of manufacturer field staff to your business?	6.9	7.1	+0.2	+0.3	Question 12 & 13 - Overall Rating				
Q9i: The quality of your manufacturer's training?	6.7	6.8	+0.1	-0.3	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9j: The cost of manufacturer's training?	6.5	7.0	+0.5	+0.7	Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	7.1	7.5	+0.4	+0.9
Q9k: Your manufacturer's apprenticeship programme?	7.9	7.0	-0.9	-0.2	Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	7.2	7.8	+0.6	+1.2
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	6.3	6.2	-0.1	-0.3					

Overall Manufacturer Rating

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

Summer 2023

8.1

Winter 2024

7.2

Ranking vs. Summer 23
10 vs. 6

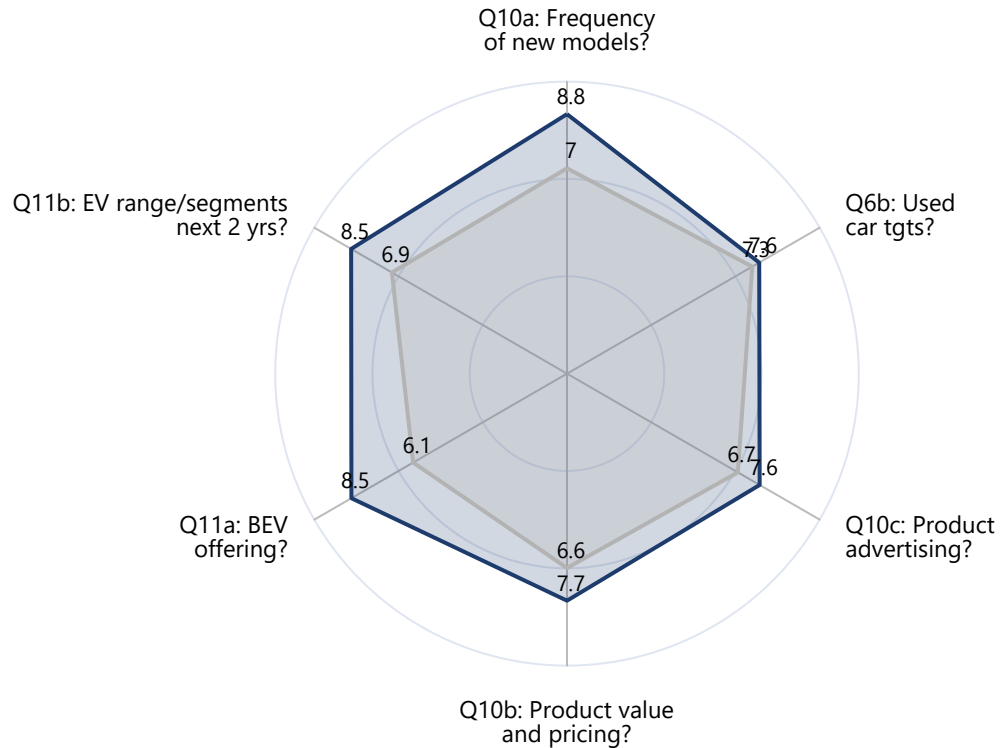
% Change
-11.1%

Score Change
-0.9 pts



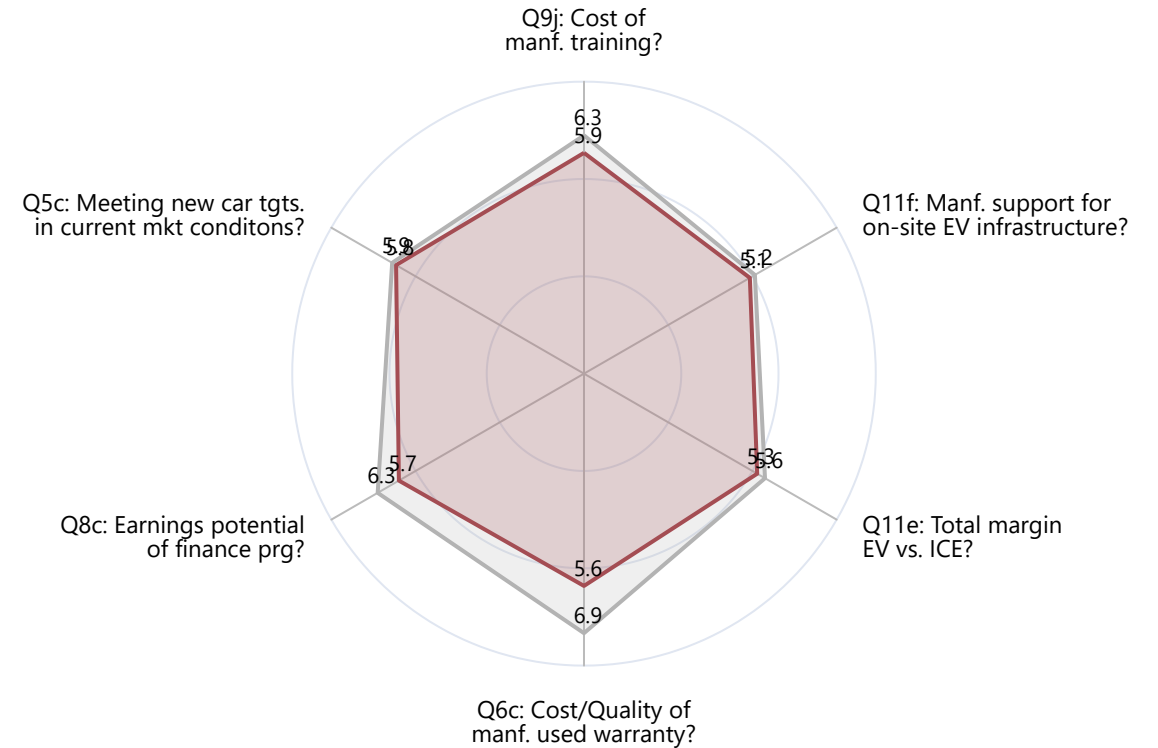
Top 6 Questions vs Average

Brand 2024 ● Average 2024 ●



Bottom 6 Questions vs Average

Brand 2024 ● Average 2024 ●



Question 4 - Value of the franchise	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	7.5	6.1	-1.4	-0.0
Q4b: The future profit return from representing your franchise?	7.6	6.3	-1.3	+0.1
Q4c: The required level of capital investment?	7.7	6.7	-1.0	+0.4
Q4d: The cost required in your dealership to meet franchised standards?	7.7	6.8	-0.9	+0.5
Q4e: The return on capital for your dealership?	7.3	6.6	-0.7	+0.7
Q4f: The quality of guidance provided by your manufacturer to your dealership?	7.1	6.4	-0.7	-0.0
Q4g: The financial support available to your dealership from your manufacturer?	6.6	6.3	-0.3	+0.4

Question 6 - Used car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	7.0	6.5	-0.5	-0.9
Q6b: The targets set by your manufacturer for used cars?	7.1	7.6	+0.5	+0.3
Q6c: The cost and quality of your manufacturer's used car warranties?	6.9	5.6	-1.3	-1.3
Q6d: Your total margin on used car sales?	7.7	6.9	-0.8	-0.0
Q6e: Your manufacturer's used car programme?	6.1	6.0	-0.1	-1.0
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	7.3	7.2	-0.1	+0.3

Question 5 - New car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	6.4	6.5	+0.1	+0.3
Q5b: Your new car targeting process?	6.1	6.0	-0.1	-0.1
Q5c: Your ability to meet your manufacturers new car targets in the current market conditions?		5.8	-	-0.1
Q5d: Your total margin on new vehicles?	7.4	6.2	-1.2	+0.0
Q5e: Your current bonus and rebate rates on new car sales?	7.5	6.0	-1.5	-0.1
Q5f: Manufacturer inducement to self register vehicles?	6.8	6.2	-0.6	+0.1
Q5g: Manufacturer's new vehicle supply?	5.7	6.4	+0.7	-0.0
Q5h: The fairness of your manufacturer's new car ordering and stocking policies?	6.3	6.4	+0.1	-0.2
Q5i: The fairness of your manufacturer's demonstrator programme?	7.6	6.8	-0.8	+0.4
Q5j: The affect the ZEV Mandate is having on obtaining new vehicles for customer orders?		6.0	-	-0.3

Question 7 - Aftersales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	7.0	6.5	-0.5	-0.2
Q7b: Quality of technical support?	7.0	6.9	-0.1	+0.4
Q7c: Availability of parts?	6.4	6.2	-0.2	+0.1
Q7d: Price of manufacturer parts compared with parts factors?	6.2	6.2	0.0	+0.2
Q7e: Service profitability earnings?	6.7	6.7	0.0	+0.0
Q7f: Manufacturer service plan rates and recovery?	6.7	6.4	-0.3	-0.1
Q7g: The fairness of your manufacturer's warranty policy for you and your customers?	7.3	6.5	-0.8	-0.4
Q7h: Your manufacturer's stocking policy for parts/accessories?	7.0	6.8	-0.2	-0.2

Question 8 - Finance

Score (S23) Score (W24) +/- (pts) vs. Avg.

Q8a: The competitiveness of your manufacturer's finance programme?	7.1	6.8	-0.3	-0.2
Q8b: The reasonableness of the finance targets set by your manufacturer?	7.6	6.7	-0.9	-0.5
Q8c: The earnings potential of your manufacturer's finance programme?	6.2	5.7	-0.5	-0.6
Q8d: The support you receive from your manufacturer's finance house?	7.3	6.3	-1.0	-0.7

Question 9 - Dealer/Manufacturer relationships

Score (S23) Score (W24) +/- (pts) vs. Avg.

Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	7.6	6.9	-0.7	-0.2
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	6.8	6.4	-0.4	-0.2
Q9c: Your manufacturer's dealer council/franchise board?	6.9	6.4	-0.5	-0.5
Q9d: Your manufacturer's response to your communications with them?	7.0	6.5	-0.5	-0.4
Q9e: Your manufacturer dealer standards are fair and reasonable?	7.7	6.9	-0.8	-0.1
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	7.4	6.5	-0.9	+0.0
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	7.3	6.8	-0.5	-0.1
Q9h: The value of manufacturer field staff to your business?	7.6	7.0	-0.6	+0.2
Q9i: The quality of your manufacturer's training?	7.2	6.9	-0.3	-0.2
Q9j: The cost of manufacturer's training?	6.7	5.9	-0.8	-0.5
Q9k: Your manufacturer's apprenticeship programme?	7.2	7.2	0.0	+0.0
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	7.3	6.5	-0.8	+0.1

Question 10 - Product and marketing

Score (S23) Score (W24) +/- (pts) vs. Avg.

Q10a: Frequency of introduction of new models?	9.2	8.8	-0.4	+1.8
Q10b: Product value and pricing?	8.4	7.7	-0.7	+1.1
Q10c: Product advertising?	8.6	7.6	-1.0	+0.9

Question 11 - Electric vehicle/Plug-in vehicles

Score (S23) Score (W24) +/- (pts) vs. Avg.

Q11a: Battery Electric Vehicle products your manufacturer currently offers?	8.9	8.5	-0.4	+2.4
Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	9.0	8.5	-0.5	+1.6
Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	8.4	7.5	-0.9	+0.9
Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	7.1	5.9	-1.2	+0.5
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	-0.2
Q11f: With your manufacturer's support with on-site EV charging infrastructure?	5.8	5.1	-0.7	-0.2
Q11g: That your manufacturer's Electric Vehicle charging information and training equips your customers to successfully transition to an EV?		6.6	-	+0.4

Question 12 & 13 - Overall Rating

Score (S23) Score (W24) +/- (pts) vs. Avg.

Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	8.1	7.2	-0.9	+0.6
Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	8.2	6.8	-1.4	+0.2

Overall Manufacturer Rating

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

Summer 2023

3.0

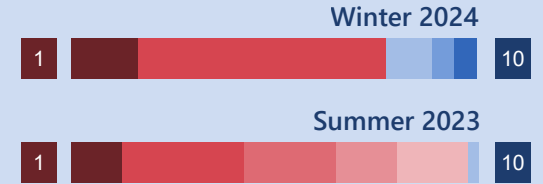
Winter 2024

2.9

Ranking vs. Summer 23
32 vs. 26

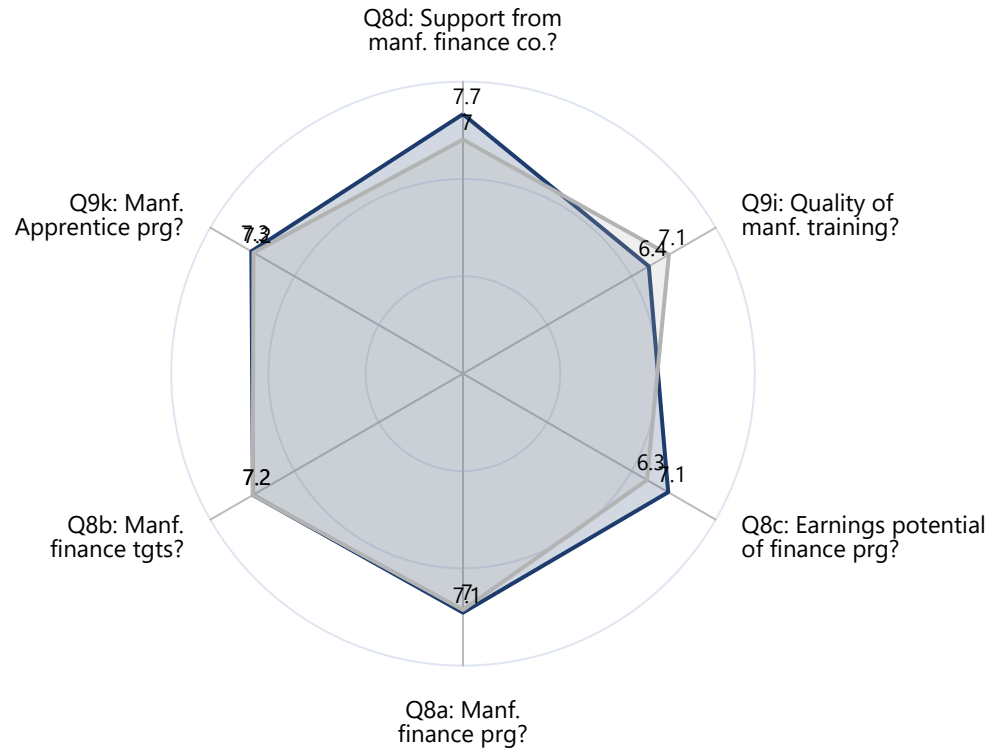
% Change
-3.3%

Score Change
-0.1 pts



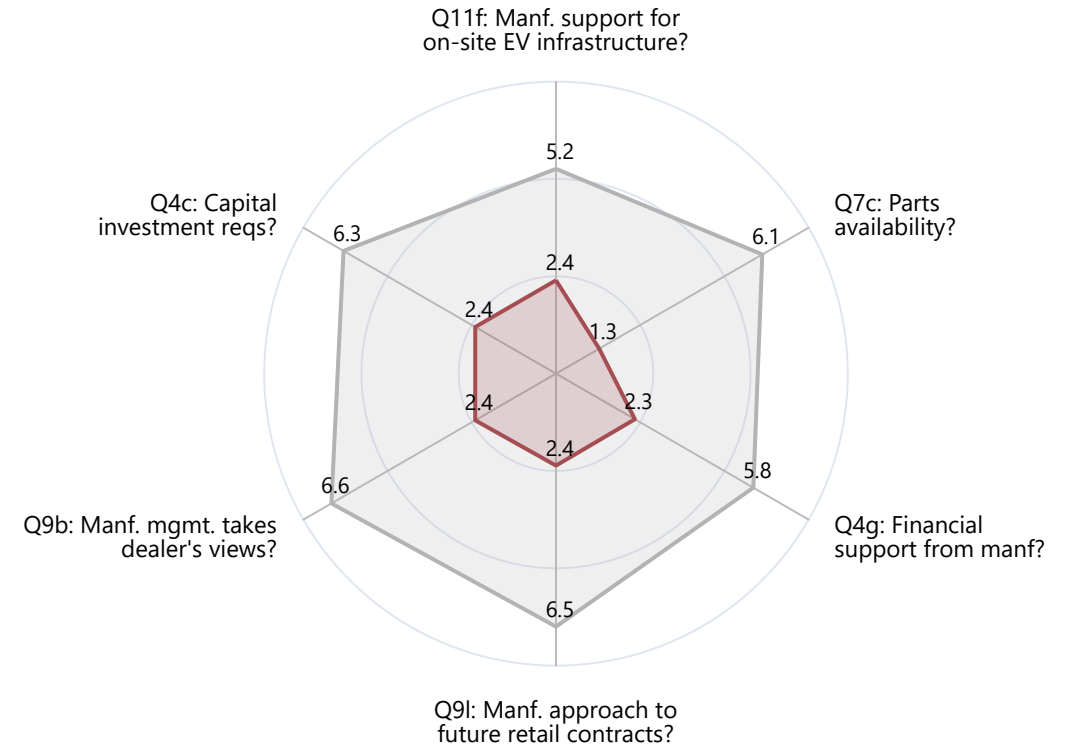
Top 6 Questions vs Average

Brand 2024 ● Average 2024 ●



Bottom 6 Questions vs Average

Brand 2024 ● Average 2024 ●



Question 4 - Value of the franchise	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	2.6	2.7	+0.1	-3.4
Q4b: The future profit return from representing your franchise?	1.6	3.1	+1.5	-3.1
Q4c: The required level of capital investment?	2.5	2.4	-0.1	-3.9
Q4d: The cost required in your dealership to meet franchised standards?	2.6	3.1	+0.5	-3.1
Q4e: The return on capital for your dealership?	2.5	2.6	+0.1	-3.3
Q4f: The quality of guidance provided by your manufacturer to your dealership?	3.1	3.1	0.0	-3.3
Q4g: The financial support available to your dealership from your manufacturer?	2.5	2.3	-0.2	-3.5

Question 6 - Used car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	6.8	5.2	-1.6	-2.2
Q6b: The targets set by your manufacturer for used cars?	6.5	5.3	-1.2	-2.0
Q6c: The cost and quality of your manufacturer's used car warranties?	5.3	4.5	-0.8	-2.4
Q6d: Your total margin on used car sales?	6.8	5.7	-1.1	-1.2
Q6e: Your manufacturer's used car programme?	6.5	5.4	-1.1	-1.7
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	5.5	5.7	+0.2	-1.2

Question 5 - New car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	3.8	3.2	-0.6	-3.0
Q5b: Your new car targeting process?	4.5	2.5	-2.0	-3.5
Q5c: Your ability to meet your manufacturers new car targets in the current market conditions?		3.4	-	-2.5
Q5d: Your total margin on new vehicles?	5.1	4.2	-0.9	-1.9
Q5e: Your current bonus and rebate rates on new car sales?	4.5	2.7	-1.8	-3.4
Q5f: Manufacturer inducement to self register vehicles?	5.4	4.1	-1.3	-2.0
Q5g: Manufacturer's new vehicle supply?	2.6	2.9	+0.3	-3.5
Q5h: The fairness of your manufacturer's new car ordering and stocking policies?	4.5	6.1	+1.6	-0.5
Q5i: The fairness of your manufacturer's demonstrator programme?	4.6	3.2	-1.4	-3.2
Q5j: The affect the ZEV Mandate is having on obtaining new vehicles for customer orders?		5.1	-	-1.2

Question 7 - Aftersales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	6.0	5.2	-0.8	-1.5
Q7b: Quality of technical support?	6.2	5.2	-1.0	-1.3
Q7c: Availability of parts?	3.0	1.3	-1.7	-4.8
Q7d: Price of manufacturer parts compared with parts factors?	4.0	2.5	-1.5	-3.4
Q7e: Service profitability earnings?	4.9	4.1	-0.8	-2.6
Q7f: Manufacturer service plan rates and recovery?	5.6	4.5	-1.1	-2.0
Q7g: The fairness of your manufacturer's warranty policy for you and your customers?	6.4	4.8	-1.6	-2.1
Q7h: Your manufacturer's stocking policy for parts/accessories?	6.1	6.0	-0.1	-1.0

Question 8 - Finance

Score (S23) Score (W24) +/- (pts) vs. Avg.

Q8a: The competitiveness of your manufacturer's finance programme?	6.0	7.1	+1.1	+0.1
Q8b: The reasonableness of the finance targets set by your manufacturer?	6.8	7.2	+0.4	-0.0
Q8c: The earnings potential of your manufacturer's finance programme?	6.3	7.1	+0.8	+0.7
Q8d: The support you receive from your manufacturer's finance house?	7.0	7.7	+0.7	+0.8

Question 9 - Dealer/Manufacturer relationships

Score (S23) Score (W24) +/- (pts) vs. Avg.

Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	5.7	3.9	-1.8	-3.2
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	4.9	2.4	-2.5	-4.3
Q9c: Your manufacturer's dealer council/franchise board?	5.6	4.9	-0.7	-1.9
Q9d: Your manufacturer's response to your communications with them?	5.9	3.1	-2.8	-3.7
Q9e: Your manufacturer dealer standards are fair and reasonable?	4.9	3.2	-1.7	-3.7
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	5.5	3.9	-1.6	-2.6
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	5.2	4.5	-0.7	-2.3
Q9h: The value of manufacturer field staff to your business?	5.0	5.2	+0.2	-1.6
Q9i: The quality of your manufacturer's training?	5.9	6.4	+0.5	-0.7
Q9j: The cost of manufacturer's training?	4.9	4.2	-0.7	-2.1
Q9k: Your manufacturer's apprenticeship programme?	7.0	7.3	+0.3	+0.1
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	2.8	2.4	-0.4	-4.1

Question 10 - Product and marketing

Score (S23) Score (W24) +/- (pts) vs. Avg.

Q10a: Frequency of introduction of new models?	3.7	4.6	+0.9	-2.4
Q10b: Product value and pricing?	4.1	3.1	-1.0	-3.6
Q10c: Product advertising?	3.8	4.5	+0.7	-2.2

Question 11 - Electric vehicle/Plug-in vehicles

Score (S23) Score (W24) +/- (pts) vs. Avg.

Q11a: Battery Electric Vehicle products your manufacturer currently offers?	4.0	3.2	-0.8	-2.8
Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	3.5	3.2	-0.3	-3.7
Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	5.6	5.4	-0.2	-1.3
Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	3.3	3.8	+0.5	-1.6
Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	4.2	5.4	+1.2	-0.2
Q11f: With your manufacturer's support with on-site EV charging infrastructure?	2.5	2.4	-0.1	-2.9
Q11g: That your manufacturer's Electric Vehicle charging information and training equips your customers to successfully transition to an EV?		4.6	-	-1.7

Question 12 & 13 - Overall Rating

Score (S23) Score (W24) +/- (pts) vs. Avg.

Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	3.0	2.9	-0.1	-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?	2.9	2.7	-0.2	-3.8

Overall Manufacturer Rating

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

Summer 2023

2.3

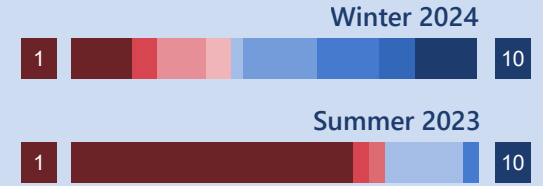
Winter 2024

6.1

Ranking vs. Summer 23
17 vs. 31

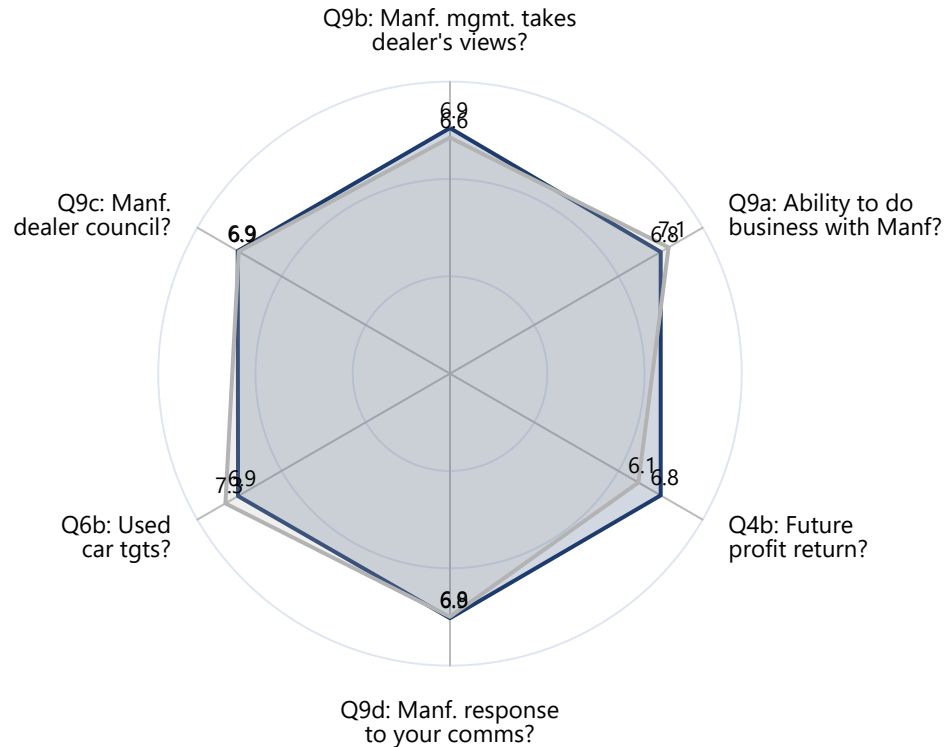
% Change
+165.2%

Score Change
+3.8 pts



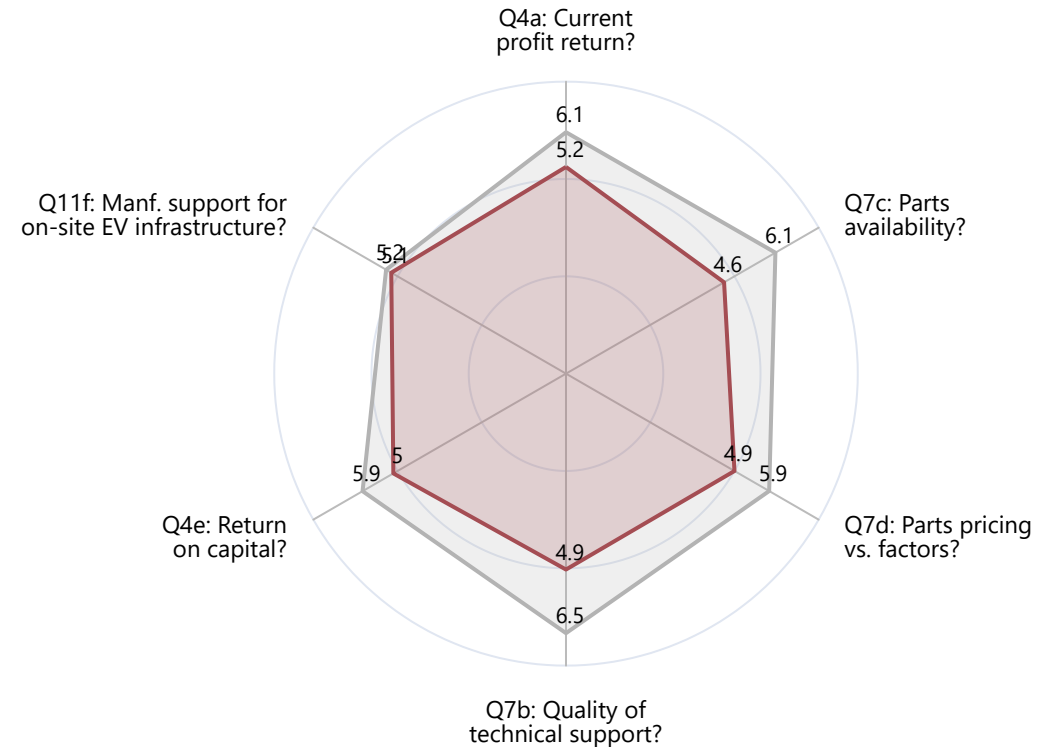
Top 6 Questions vs Average

Brand 2024 ● Average 2024 ●



Bottom 6 Questions vs Average

Brand 2024 ● Average 2024 ●



Question 4 - Value of the franchise	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	2.6	5.2	+2.6	-0.9
Q4b: The future profit return from representing your franchise?	3.5	6.8	+3.3	+0.7
Q4c: The required level of capital investment?	3.1	5.8	+2.7	-0.5
Q4d: The cost required in your dealership to meet franchised standards?	3.2	6.1	+2.9	-0.1
Q4e: The return on capital for your dealership?	2.8	5.0	+2.2	-0.9
Q4f: The quality of guidance provided by your manufacturer to your dealership?	2.8	6.2	+3.4	-0.2
Q4g: The financial support available to your dealership from your manufacturer?	3.0	5.4	+2.4	-0.4

Question 6 - Used car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	3.9	6.4	+2.5	-1.0
Q6b: The targets set by your manufacturer for used cars?	3.8	6.9	+3.1	-0.4
Q6c: The cost and quality of your manufacturer's used car warranties?	3.8	6.0	+2.2	-0.9
Q6d: Your total margin on used car sales?	4.4	6.0	+1.6	-0.9
Q6e: Your manufacturer's used car programme?	3.7	5.8	+2.1	-1.3
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	4.4	6.8	+2.4	-0.1

Question 5 - New car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	3.0	6.2	+3.2	-0.0
Q5b: Your new car targeting process?	3.0	5.9	+2.9	-0.2
Q5c: Your ability to meet your manufacturers new car targets in the current market conditions?		5.9	-	+0.1
Q5d: Your total margin on new vehicles?	3.5	6.0	+2.5	-0.1
Q5e: Your current bonus and rebate rates on new car sales?	2.9	6.0	+3.1	-0.1
Q5f: Manufacturer inducement to self register vehicles?	3.3	5.2	+1.9	-0.9
Q5g: Manufacturer's new vehicle supply?	3.6	5.9	+2.3	-0.4
Q5h: The fairness of your manufacturer's new car ordering and stocking policies?	2.2	5.3	+3.1	-1.2
Q5i: The fairness of your manufacturer's demonstrator programme?	4.1	5.6	+1.5	-0.8
Q5j: The affect the ZEV Mandate is having on obtaining new vehicles for customer orders?		6.2	-	-0.2

Question 7 - Aftersales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	4.2	6.2	+2.0	-0.5
Q7b: Quality of technical support?	3.2	4.9	+1.7	-1.6
Q7c: Availability of parts?	3.2	4.6	+1.4	-1.5
Q7d: Price of manufacturer parts compared with parts factors?	3.4	4.9	+1.5	-1.0
Q7e: Service profitability earnings?	4.0	5.7	+1.7	-1.0
Q7f: Manufacturer service plan rates and recovery?	3.6	5.2	+1.6	-1.2
Q7g: The fairness of your manufacturer's warranty policy for you and your customers?	3.3	5.5	+2.2	-1.5
Q7h: Your manufacturer's stocking policy for parts/accessories?	4.5	6.0	+1.5	-1.0

Question 8 - Finance					Question 10 - Product and marketing				
	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.		Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	2.8	6.0	+3.2	-1.1	Q10a: Frequency of introduction of new models?	3.3	5.9	+2.6	-1.1
Q8b: The reasonableness of the finance targets set by your manufacturer?	3.1	6.7	+3.6	-0.5	Q10b: Product value and pricing?	3.2	5.8	+2.6	-0.8
Q8c: The earnings potential of your manufacturer's finance programme?	2.8	5.9	+3.1	-0.4	Q10c: Product advertising?	3.2	5.8	+2.6	-0.9
Q8d: The support you receive from your manufacturer's finance house?	2.8	5.8	+3.0	-1.1	Question 11 - Electric vehicle/Plug-in vehicles				
Question 9 - Dealer/Manufacturer relationships					Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	3.5	6.8	+3.3	-0.3	Q11a: Battery Electric Vehicle products your manufacturer currently offers?	3.7	5.9	+2.2	-0.2
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	3.2	6.9	+3.7	+0.3	Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	3.9	6.6	+2.7	-0.3
Q9c: Your manufacturer's dealer council/franchise board?	4.2	6.9	+2.7	+0.0	Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	4.4	6.4	+2.0	-0.3
Q9d: Your manufacturer's response to your communications with them?	3.4	6.9	+3.5	+0.0	Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	3.1	6.1	+3.0	+0.6
Q9e: Your manufacturer dealer standards are fair and reasonable?	3.9	6.5	+2.6	-0.5	Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	3.2	6.1	+2.9	+0.5
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	3.3	6.3	+3.0	-0.2	Q11f: With your manufacturer's support with on-site EV charging infrastructure?	3.0	5.1	+2.1	-0.2
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	4.0	6.2	+2.2	-0.7	Q11g: That your manufacturer's Electric Vehicle charging information and training equips your customers to successfully transition to an EV?		5.7	-	-0.5
Q9h: The value of manufacturer field staff to your business?	3.8	6.4	+2.6	-0.5	Question 12 & 13 - Overall Rating				
Q9i: The quality of your manufacturer's training?	4.2	6.2	+2.0	-0.9	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9j: The cost of manufacturer's training?	3.0	6.0	+3.0	-0.3	Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	2.3	6.1	+3.8	-0.6
Q9k: Your manufacturer's apprenticeship programme?	4.8	6.5	+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?	2.8	6.3	+3.5	-0.3
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	3.1	6.3	+3.2	-0.2					

Overall Manufacturer Rating

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

Summer 2023

9.5

Winter 2024

9.2

Ranking vs. Summer 23
1 vs. 1

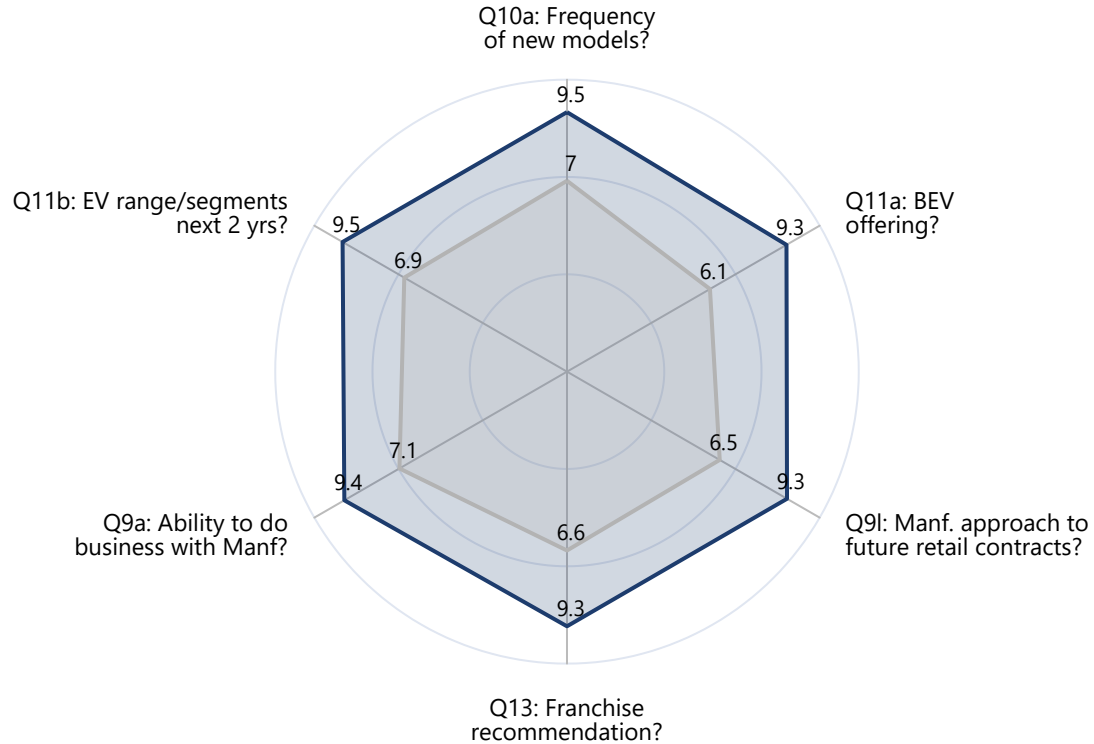
% Change
-3.2%

Score Change
-0.3 pts



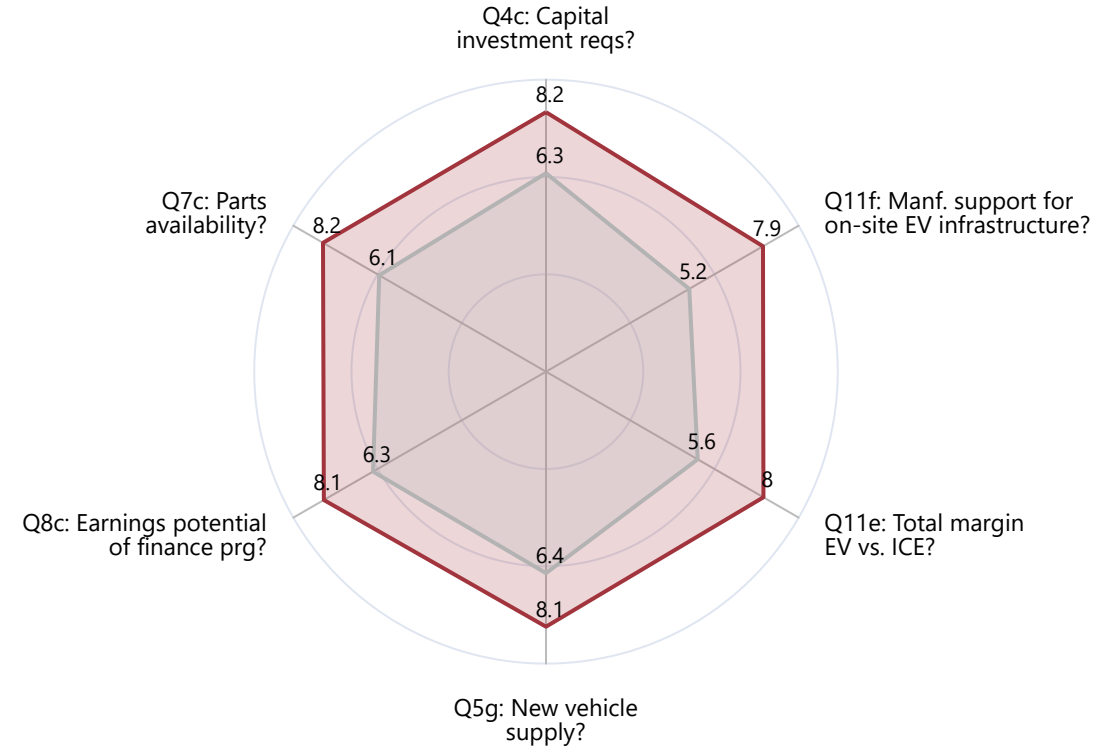
Top 6 Questions vs Average

Brand 2024 ● Average 2024 ●



Bottom 6 Questions vs Average

Brand 2024 ● Average 2024 ●



Question 4 - Value of the franchise	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	9.1	8.8	-0.3	+2.7
Q4b: The future profit return from representing your franchise?	9.0	8.7	-0.3	+2.6
Q4c: The required level of capital investment?	8.3	8.2	-0.1	+1.9
Q4d: The cost required in your dealership to meet franchised standards?	8.0	8.3	+0.3	+2.1
Q4e: The return on capital for your dealership?	8.7	8.8	+0.1	+2.9
Q4f: The quality of guidance provided by your manufacturer to your dealership?	8.9	8.9	0.0	+2.6
Q4g: The financial support available to your dealership from your manufacturer?	8.2	8.5	+0.3	+2.7

Question 6 - Used car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	9.3	9.1	-0.2	+1.7
Q6b: The targets set by your manufacturer for used cars?	9.2	9.2	0.0	+1.9
Q6c: The cost and quality of your manufacturer's used car warranties?	9.0	9.0	0.0	+2.1
Q6d: Your total margin on used car sales?	8.9	9.1	+0.2	+2.1
Q6e: Your manufacturer's used car programme?	9.1	9.1	0.0	+2.1
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	8.8	9.1	+0.3	+2.2

Question 5 - New car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	8.6	8.5	-0.1	+2.3
Q5b: Your new car targeting process?	8.2	8.6	+0.4	+2.6
Q5c: Your ability to meet your manufacturers new car targets in the current market conditions?		8.3	-	+2.4
Q5d: Your total margin on new vehicles?	8.5	8.4	-0.1	+2.2
Q5e: Your current bonus and rebate rates on new car sales?	8.5	8.5	0.0	+2.3
Q5f: Manufacturer inducement to self register vehicles?	8.9	8.7	-0.2	+2.6
Q5g: Manufacturer's new vehicle supply?	7.5	8.1	+0.6	+1.7
Q5h: The fairness of your manufacturer's new car ordering and stocking policies?	8.7	8.6	-0.1	+2.1
Q5i: The fairness of your manufacturer's demonstrator programme?	8.7	8.8	+0.1	+2.5
Q5j: The affect the ZEV Mandate is having on obtaining new vehicles for customer orders?		8.7	-	+2.3

Question 7 - Aftersales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	8.4	8.3	-0.1	+1.6
Q7b: Quality of technical support?	8.1	8.6	+0.5	+2.1
Q7c: Availability of parts?	7.6	8.2	+0.6	+2.1
Q7d: Price of manufacturer parts compared with parts factors?	7.9	8.3	+0.4	+2.3
Q7e: Service profitability earnings?	8.2	8.3	+0.1	+1.6
Q7f: Manufacturer service plan rates and recovery?	8.1	8.2	+0.1	+1.8
Q7g: The fairness of your manufacturer's warranty policy for you and your customers?	8.5	8.5	0.0	+1.6
Q7h: Your manufacturer's stocking policy for parts/accessories?	8.4	8.6	+0.2	+1.6

Question 8 - Finance					Question 10 - Product and marketing				
	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.		Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	8.4	8.6	+0.2	+1.5	Q10a: Frequency of introduction of new models?	9.5	9.5	0.0	+2.5
Q8b: The reasonableness of the finance targets set by your manufacturer?	8.7	9.0	+0.3	+1.8	Q10b: Product value and pricing?	9.0	8.9	-0.1	+2.2
Q8c: The earnings potential of your manufacturer's finance programme?	7.9	8.1	+0.2	+1.8	Q10c: Product advertising?	9.4	9.2	-0.2	+2.5
Q8d: The support you receive from your manufacturer's finance house?	8.5	8.6	+0.1	+1.7	Question 11 - Electric vehicle/Plug-in vehicles				
Question 9 - Dealer/Manufacturer relationships					Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	9.3	9.4	+0.1	+2.3	Q11a: Battery Electric Vehicle products your manufacturer currently offers?	9.3	9.3	0.0	+3.2
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	8.9	9.0	+0.1	+2.3	Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	9.4	9.5	+0.1	+2.6
Q9c: Your manufacturer's dealer council/franchise board?	8.6	8.6	0.0	+1.8	Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	9.3	9.3	0.0	+2.6
Q9d: Your manufacturer's response to your communications with them?	8.7	9.1	+0.4	+2.3	Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	8.5	8.5	0.0	+3.0
Q9e: Your manufacturer dealer standards are fair and reasonable?	9.3	9.1	-0.2	+2.2	Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	8.1	8.0	-0.1	+2.4
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	9.0	9.1	+0.1	+2.6	Q11f: With your manufacturer's support with on-site EV charging infrastructure?	7.8	7.9	+0.1	+2.7
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	9.0	9.2	+0.2	+2.4	Q11g: That your manufacturer's Electric Vehicle charging information and training equips your customers to successfully transition to an EV?		8.7	-	+2.5
Q9h: The value of manufacturer field staff to your business?	8.6	9.0	+0.4	+2.2	Question 12 & 13 - Overall Rating				
Q9i: The quality of your manufacturer's training?	9.0	8.9	-0.1	+1.8	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9j: The cost of manufacturer's training?	8.6	8.5	-0.1	+2.1	Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	9.5	9.2	-0.3	+2.6
Q9k: Your manufacturer's apprenticeship programme?	8.9	9.2	+0.3	+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?	9.5	9.3	-0.2	+2.8
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	9.1	9.3	+0.2	+2.9					

Overall Manufacturer Rating

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

Summer 2023

5.6

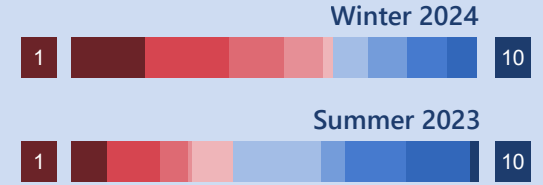
Winter 2024

4.1

Ranking vs. Summer 23
30 vs. 19

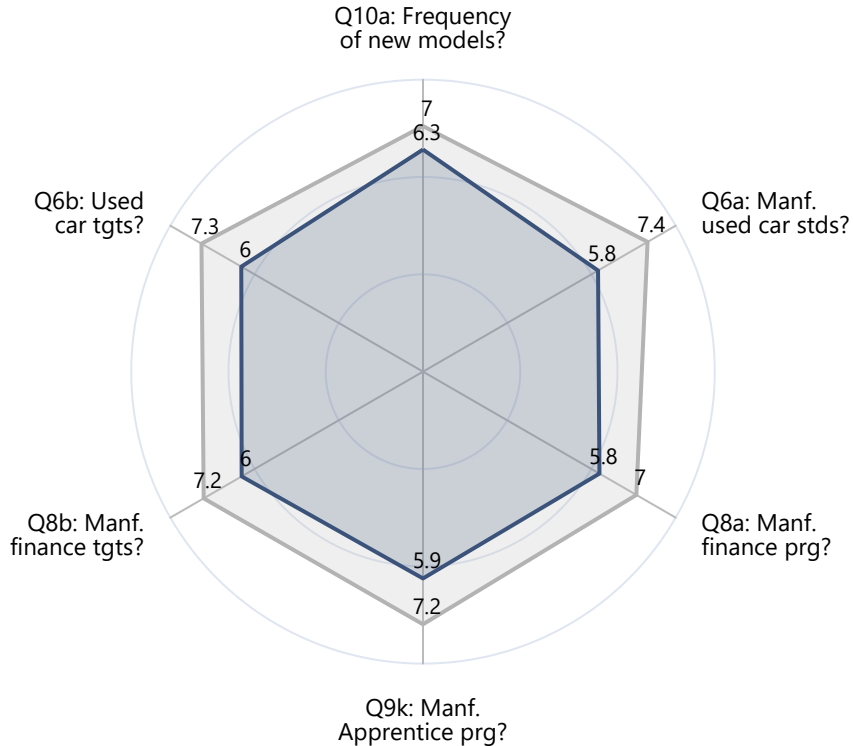
% Change
-26.8%

Score Change
-1.5 pts



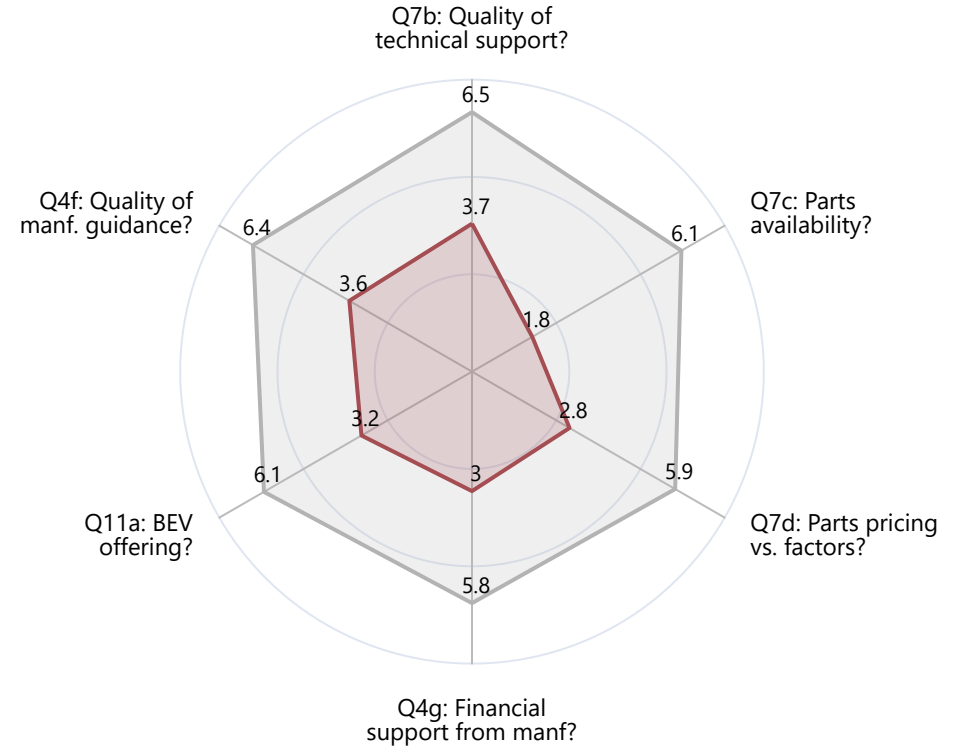
Top 6 Questions vs Average

Brand 2024 ● | Average 2024 ●



Bottom 6 Questions vs Average

Brand 2024 ● | Average 2024 ●



Question 4 - Value of the franchise	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	7.7	5.3	-2.4	-0.8
Q4b: The future profit return from representing your franchise?	4.4	4.3	-0.1	-1.9
Q4c: The required level of capital investment?	4.7	4.4	-0.3	-1.9
Q4d: The cost required in your dealership to meet franchised standards?	4.5	4.3	-0.2	-1.9
Q4e: The return on capital for your dealership?	6.3	4.3	-2.0	-1.6
Q4f: The quality of guidance provided by your manufacturer to your dealership?	4.8	3.6	-1.2	-2.8
Q4g: The financial support available to your dealership from your manufacturer?	4.3	3.0	-1.3	-2.8

Question 6 - Used car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	7.1	5.8	-1.3	-1.6
Q6b: The targets set by your manufacturer for used cars?	6.2	6.0	-0.2	-1.3
Q6c: The cost and quality of your manufacturer's used car warranties?	5.4	5.1	-0.3	-1.8
Q6d: Your total margin on used car sales?	6.4	4.0	-2.4	-3.0
Q6e: Your manufacturer's used car programme?	6.0	4.9	-1.1	-2.2
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	4.7	4.4	-0.3	-2.5

Question 5 - New car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	5.8	5.0	-0.8	-1.3
Q5b: Your new car targeting process?	5.4	4.7	-0.7	-1.3
Q5c: Your ability to meet your manufacturers new car targets in the current market conditions?		4.6	-	-1.3
Q5d: Your total margin on new vehicles?	7.6	5.7	-1.9	-0.4
Q5e: Your current bonus and rebate rates on new car sales?	7.1	5.2	-1.9	-0.9
Q5f: Manufacturer inducement to self register vehicles?	6.7	5.2	-1.5	-0.9
Q5g: Manufacturer's new vehicle supply?	4.8	5.4	+0.6	-1.0
Q5h: The fairness of your manufacturer's new car ordering and stocking policies?	5.2	5.6	+0.4	-1.0
Q5i: The fairness of your manufacturer's demonstrator programme?	5.4	4.7	-0.7	-1.7
Q5j: The affect the ZEV Mandate is having on obtaining new vehicles for customer orders?		5.0	-	-1.3

Question 7 - Aftersales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	5.8	5.2	-0.6	-1.6
Q7b: Quality of technical support?	5.3	3.7	-1.6	-2.8
Q7c: Availability of parts?	2.5	1.8	-0.7	-4.3
Q7d: Price of manufacturer parts compared with parts factors?	3.7	2.8	-0.9	-3.1
Q7e: Service profitability earnings?	5.3	3.8	-1.5	-2.9
Q7f: Manufacturer service plan rates and recovery?	5.1	3.9	-1.2	-2.6
Q7g: The fairness of your manufacturer's warranty policy for you and your customers?	5.5	3.8	-1.7	-3.1
Q7h: Your manufacturer's stocking policy for parts/accessories?	5.4	4.3	-1.1	-2.7

Question 8 - Finance					Question 10 - Product and marketing				
	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.		Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	6.0	5.8	-0.2	-1.2	Q10a: Frequency of introduction of new models?	6.9	6.3	-0.6	-0.7
Q8b: The reasonableness of the finance targets set by your manufacturer?	6.1	6.0	-0.1	-1.3	Q10b: Product value and pricing?	5.6	4.4	-1.2	-2.2
Q8c: The earnings potential of your manufacturer's finance programme?	6.1	5.6	-0.5	-0.7	Q10c: Product advertising?	6.3	5.6	-0.7	-1.1
Q8d: The support you receive from your manufacturer's finance house?	6.5	5.3	-1.2	-1.6	Question 11 - Electric vehicle/Plug-in vehicles				
Question 9 - Dealer/Manufacturer relationships					Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	4.9	5.0	+0.1	-2.1	Q11a: Battery Electric Vehicle products your manufacturer currently offers?	4.3	3.2	-1.1	-2.8
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	4.1	4.7	+0.6	-1.9	Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	5.5	5.4	-0.1	-1.5
Q9c: Your manufacturer's dealer council/franchise board?	5.6	5.2	-0.4	-1.7	Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	5.4	5.3	-0.1	-1.4
Q9d: Your manufacturer's response to your communications with them?	4.9	5.0	+0.1	-1.8	Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	4.8	4.5	-0.3	-1.0
Q9e: Your manufacturer dealer standards are fair and reasonable?	5.0	4.5	-0.5	-2.5	Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	5.3	5.3	0.0	-0.2
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	4.8	4.5	-0.3	-2.0	Q11f: With your manufacturer's support with on-site EV charging infrastructure?	3.5	4.1	+0.6	-1.1
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	5.1	4.7	-0.4	-2.1	Q11g: That your manufacturer's Electric Vehicle charging information and training equips your customers to successfully transition to an EV?		4.5	-	-1.7
Q9h: The value of manufacturer field staff to your business?	5.4	5.1	-0.3	-1.7	Question 12 & 13 - Overall Rating				
Q9i: The quality of your manufacturer's training?	6.3	5.6	-0.7	-1.5	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9j: The cost of manufacturer's training?	5.4	5.3	-0.1	-1.0	Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	5.6	4.1	-1.5	-2.5
Q9k: Your manufacturer's apprenticeship programme?	6.4	5.9	-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?	5.4	4.2	-1.2	-2.4
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	3.9	3.8	-0.1	-2.7					

Overall Manufacturer Rating

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

Summer 2023

9.2

Winter 2024

9.0

Ranking vs. Summer 23
3 vs. 2

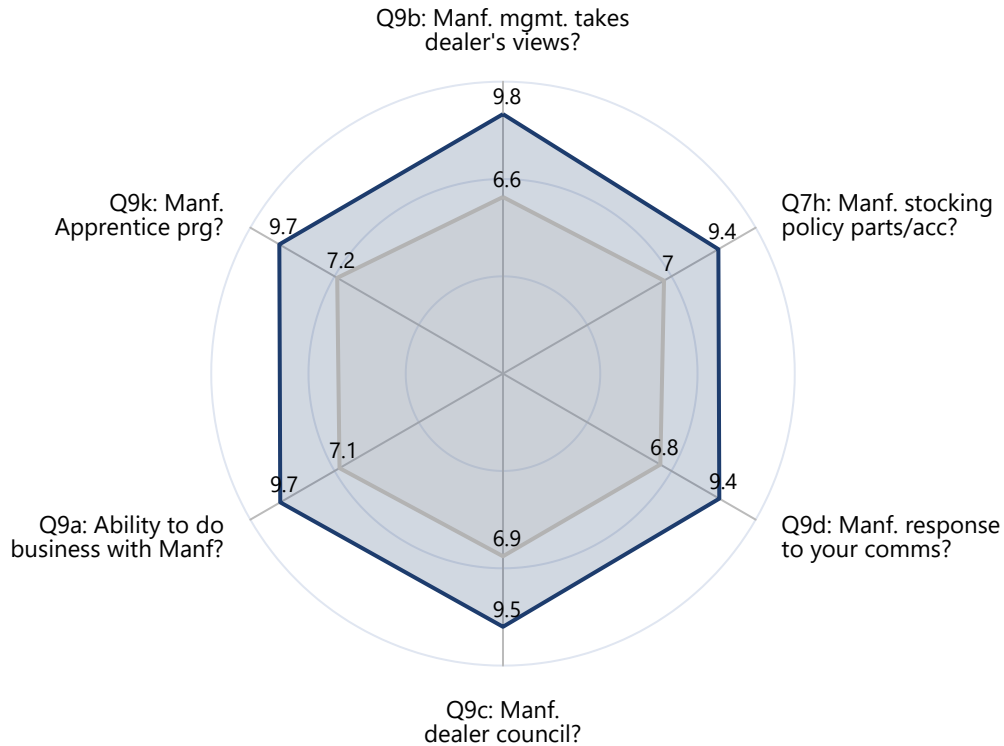
% Change
-2.2%

Score Change
-0.2 pts



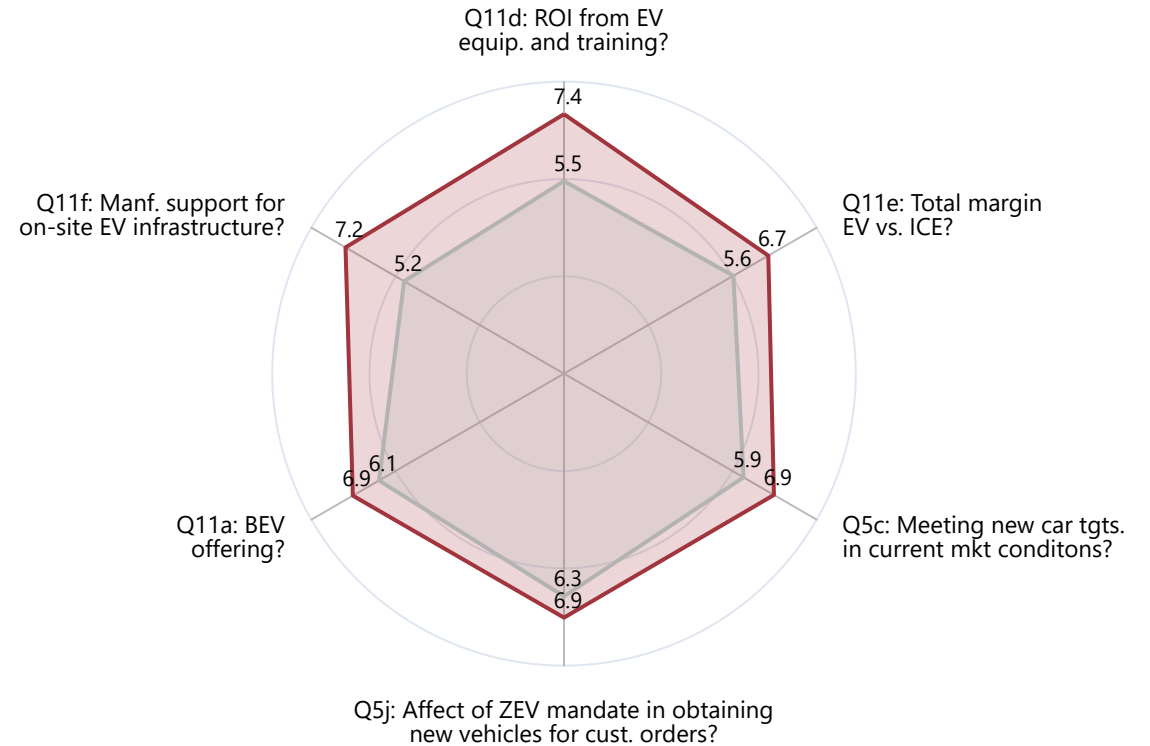
Top 6 Questions vs Average

Brand 2024 ● | Average 2024 ●



Bottom 6 Questions vs Average

Brand 2024 ● | Average 2024 ●



Question 4 - Value of the franchise	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	8.0	7.7	-0.3	+1.6
Q4b: The future profit return from representing your franchise?	8.5	8.0	-0.5	+1.9
Q4c: The required level of capital investment?	8.5	7.7	-0.8	+1.4
Q4d: The cost required in your dealership to meet franchised standards?	8.6	8.0	-0.6	+1.8
Q4e: The return on capital for your dealership?	8.4	8.0	-0.4	+2.1
Q4f: The quality of guidance provided by your manufacturer to your dealership?	9.1	9.1	0.0	+2.7
Q4g: The financial support available to your dealership from your manufacturer?	9.0	8.8	-0.2	+3.0

Question 6 - Used car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	9.2	8.9	-0.3	+1.5
Q6b: The targets set by your manufacturer for used cars?	9.1	8.1	-1.0	+0.8
Q6c: The cost and quality of your manufacturer's used car warranties?	8.8	7.9	-0.9	+1.0
Q6d: Your total margin on used car sales?	9.0	7.8	-1.2	+0.8
Q6e: Your manufacturer's used car programme?	9.0	8.1	-0.9	+1.1
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	7.5	7.6	+0.1	+0.7

Question 5 - New car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	8.7	8.2	-0.5	+2.0
Q5b: Your new car targeting process?	8.5	8.3	-0.2	+2.2
Q5c: Your ability to meet your manufacturers new car targets in the current market conditions?		6.9	-	+1.0
Q5d: Your total margin on new vehicles?	8.5	8.2	-0.3	+2.1
Q5e: Your current bonus and rebate rates on new car sales?	8.5	8.4	-0.1	+2.2
Q5f: Manufacturer inducement to self register vehicles?	8.9	7.8	-1.1	+1.7
Q5g: Manufacturer's new vehicle supply?	7.7	7.6	-0.1	+1.2
Q5h: The fairness of your manufacturer's new car ordering and stocking policies?	9.5	8.4	-1.1	+1.9
Q5i: The fairness of your manufacturer's demonstrator programme?	8.7	8.1	-0.6	+1.7
Q5j: The affect the ZEV Mandate is having on obtaining new vehicles for customer orders?		6.9	-	+0.6

Question 7 - Aftersales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	8.9	8.7	-0.2	+1.9
Q7b: Quality of technical support?	9.0	9.2	+0.2	+2.6
Q7c: Availability of parts?	9.1	9.1	0.0	+3.0
Q7d: Price of manufacturer parts compared with parts factors?	8.5	7.8	-0.7	+1.8
Q7e: Service profitability earnings?	8.7	8.8	+0.1	+2.2
Q7f: Manufacturer service plan rates and recovery?	8.7	8.5	-0.2	+2.0
Q7g: The fairness of your manufacturer's warranty policy for you and your customers?	9.1	9.2	+0.1	+2.3
Q7h: Your manufacturer's stocking policy for parts/accessories?	9.1	9.4	+0.3	+2.4

Question 8 - Finance					Question 10 - Product and marketing				
	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.		Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	8.5	8.4	-0.1	+1.4	Q10a: Frequency of introduction of new models?	8.7	8.4	-0.3	+1.4
Q8b: The reasonableness of the finance targets set by your manufacturer?	8.7	8.9	+0.2	+1.6	Q10b: Product value and pricing?	8.6	8.4	-0.2	+1.8
Q8c: The earnings potential of your manufacturer's finance programme?	7.2	7.9	+0.7	+1.5	Q10c: Product advertising?	8.3	8.7	+0.4	+1.9
Q8d: The support you receive from your manufacturer's finance house?	8.5	9.4	+0.9	+2.4	Question 11 - Electric vehicle/Plug-in vehicles				
Question 9 - Dealer/Manufacturer relationships					Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	9.5	9.7	+0.2	+2.6	Q11a: Battery Electric Vehicle products your manufacturer currently offers?	6.8	6.9	+0.1	+0.9
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	9.5	9.8	+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?	7.5	7.6	+0.1	+0.7
Q9c: Your manufacturer's dealer council/franchise board?	9.4	9.5	+0.1	+2.7	Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	8.6	8.5	-0.1	+1.8
Q9d: Your manufacturer's response to your communications with them?	9.5	9.4	-0.1	+2.6	Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	7.7	7.4	-0.3	+1.9
Q9e: Your manufacturer dealer standards are fair and reasonable?	9.4	8.4	-1.0	+1.4	Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	7.9	6.7	-1.2	+1.1
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	9.4	8.3	-1.1	+1.8	Q11f: With your manufacturer's support with on-site EV charging infrastructure?	8.0	7.2	-0.8	+1.9
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	9.3	8.4	-0.9	+1.5	Q11g: That your manufacturer's Electric Vehicle charging information and training equips your customers to successfully transition to an EV?		7.7	-	+1.5
Q9h: The value of manufacturer field staff to your business?	9.5	9.2	-0.3	+2.3	Question 12 & 13 - Overall Rating				
Q9i: The quality of your manufacturer's training?	9.0	8.6	-0.4	+1.6	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9j: The cost of manufacturer's training?	8.6	8.8	+0.2	+2.5	Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	9.2	9.0	-0.2	+2.3
Q9k: Your manufacturer's apprenticeship programme?	8.8	9.7	+0.9	+2.5	Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	9.2	9.0	-0.2	+2.4
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	9.2	8.9	-0.3	+2.4					

Overall Manufacturer Rating

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

Summer 2023

7.5

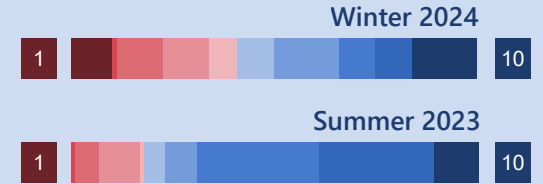
Winter 2024

6.1

Ranking vs. Summer 23
18 vs. 10

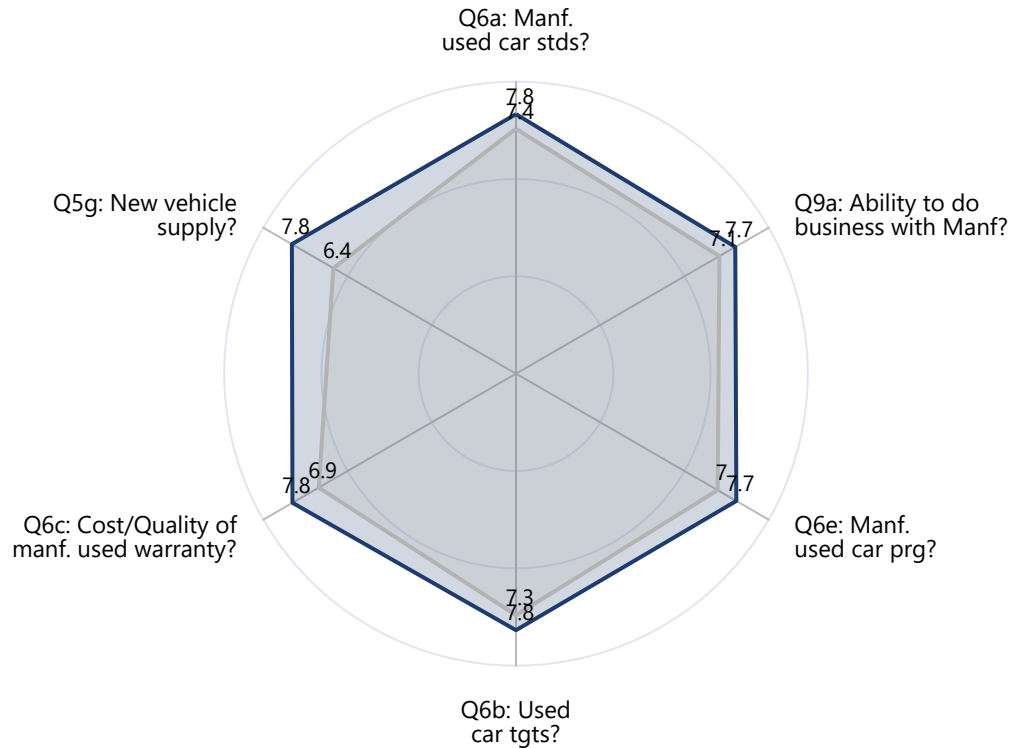
% Change
-18.7%

Score Change
-1.4 pts



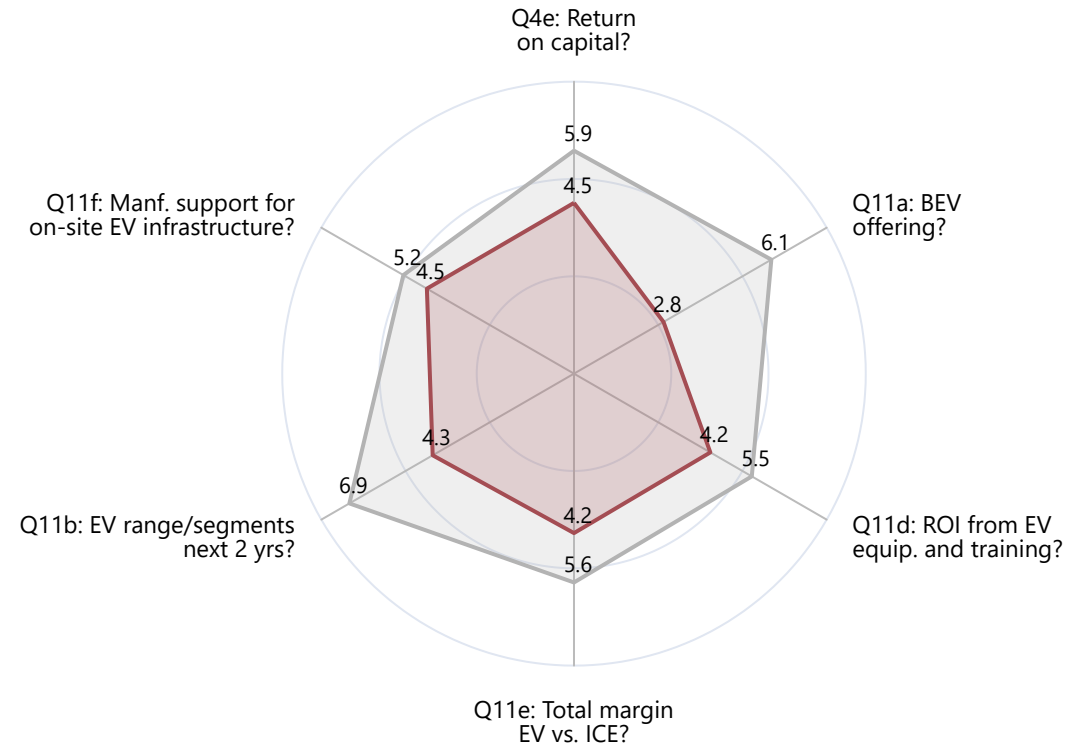
Top 6 Questions vs Average

Brand 2024 ● | Average 2024 ●



Bottom 6 Questions vs Average

Brand 2024 ● | Average 2024 ●



Question 4 - Value of the franchise	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	6.7	4.6	-2.1	-1.5
Q4b: The future profit return from representing your franchise?	6.8	5.0	-1.8	-1.1
Q4c: The required level of capital investment?	7.5	6.0	-1.5	-0.3
Q4d: The cost required in your dealership to meet franchised standards?	7.3	6.3	-1.0	+0.1
Q4e: The return on capital for your dealership?	6.7	4.5	-2.2	-1.4
Q4f: The quality of guidance provided by your manufacturer to your dealership?	7.6	6.8	-0.8	+0.4
Q4g: The financial support available to your dealership from your manufacturer?	6.4	5.1	-1.3	-0.7

Question 6 - Used car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	7.9	7.8	-0.1	+0.4
Q6b: The targets set by your manufacturer for used cars?	8.1	7.8	-0.3	+0.5
Q6c: The cost and quality of your manufacturer's used car warranties?	7.9	7.8	-0.1	+0.9
Q6d: Your total margin on used car sales?	8.0	7.0	-1.0	+0.1
Q6e: Your manufacturer's used car programme?	7.9	7.7	-0.2	+0.7
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	7.9	7.2	-0.7	+0.3

Question 5 - New car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	6.7	5.5	-1.2	-0.7
Q5b: Your new car targeting process?	6.7	5.5	-1.2	-0.5
Q5c: Your ability to meet your manufacturers new car targets in the current market conditions?		5.0	-	-0.9
Q5d: Your total margin on new vehicles?	7.3	5.5	-1.8	-0.6
Q5e: Your current bonus and rebate rates on new car sales?	7.1	5.5	-1.6	-0.7
Q5f: Manufacturer inducement to self register vehicles?	7.3	6.3	-1.0	+0.1
Q5g: Manufacturer's new vehicle supply?	7.0	7.8	+0.8	+1.4
Q5h: The fairness of your manufacturer's new car ordering and stocking policies?	7.3	6.2	-1.1	-0.4
Q5i: The fairness of your manufacturer's demonstrator programme?	7.3	6.6	-0.7	+0.2
Q5j: The affect the ZEV Mandate is having on obtaining new vehicles for customer orders?		5.4	-	-0.9

Question 7 - Aftersales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	7.8	7.2	-0.6	+0.5
Q7b: Quality of technical support?	7.8	7.6	-0.2	+1.0
Q7c: Availability of parts?	7.8	7.5	-0.3	+1.4
Q7d: Price of manufacturer parts compared with parts factors?	6.9	6.8	-0.1	+0.9
Q7e: Service profitability earnings?	7.8	7.1	-0.7	+0.4
Q7f: Manufacturer service plan rates and recovery?	7.6	7.0	-0.6	+0.5
Q7g: The fairness of your manufacturer's warranty policy for you and your customers?	8.0	7.6	-0.4	+0.7
Q7h: Your manufacturer's stocking policy for parts/accessories?	7.8	7.3	-0.5	+0.3

Question 8 - Finance					Question 10 - Product and marketing				
	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.		Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	7.4	6.8	-0.6	-0.2	Q10a: Frequency of introduction of new models?	6.2	5.0	-1.2	-2.0
Q8b: The reasonableness of the finance targets set by your manufacturer?	7.7	7.5	-0.2	+0.3	Q10b: Product value and pricing?	7.3	6.1	-1.2	-0.6
Q8c: The earnings potential of your manufacturer's finance programme?	6.6	5.8	-0.8	-0.6	Q10c: Product advertising?	6.9	5.6	-1.3	-1.2
Q8d: The support you receive from your manufacturer's finance house?	7.3	7.0	-0.3	-0.0	Question 11 - Electric vehicle/Plug-in vehicles				
Question 9 - Dealer/Manufacturer relationships					Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	8.4	7.7	-0.7	+0.6	Q11a: Battery Electric Vehicle products your manufacturer currently offers?	4.4	2.8	-1.6	-3.3
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	8.2	6.9	-1.3	+0.2	Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	6.0	4.3	-1.7	-2.6
Q9c: Your manufacturer's dealer council/franchise board?	7.5	6.4	-1.1	-0.5	Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	5.9	5.3	-0.6	-1.4
Q9d: Your manufacturer's response to your communications with them?	8.2	7.2	-1.0	+0.4	Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	5.3	4.2	-1.1	-1.3
Q9e: Your manufacturer dealer standards are fair and reasonable?	8.2	7.5	-0.7	+0.6	Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	5.5	4.2	-1.3	-1.3
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	7.9	6.3	-1.6	-0.2	Q11f: With your manufacturer's support with on-site EV charging infrastructure?	5.1	4.5	-0.6	-0.7
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	8.1	7.2	-0.9	+0.3	Q11g: That your manufacturer's Electric Vehicle charging information and training equips your customers to successfully transition to an EV?		5.4	-	-0.8
Q9h: The value of manufacturer field staff to your business?	8.3	7.7	-0.6	+0.8	Question 12 & 13 - Overall Rating				
Q9i: The quality of your manufacturer's training?	7.9	7.2	-0.7	+0.2	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9j: The cost of manufacturer's training?	7.5	6.8	-0.7	+0.5	Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	7.5	6.1	-1.4	-0.6
Q9k: Your manufacturer's apprenticeship programme?	7.8	7.1	-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?	7.4	6.1	-1.3	-0.4
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	8.4	7.4	-1.0	+0.9					

Overall Manufacturer Rating

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

Summer 2023

7.0

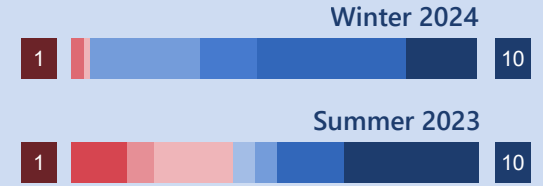
Winter 2024

8.2

Ranking vs. Summer 23
5 vs. 13

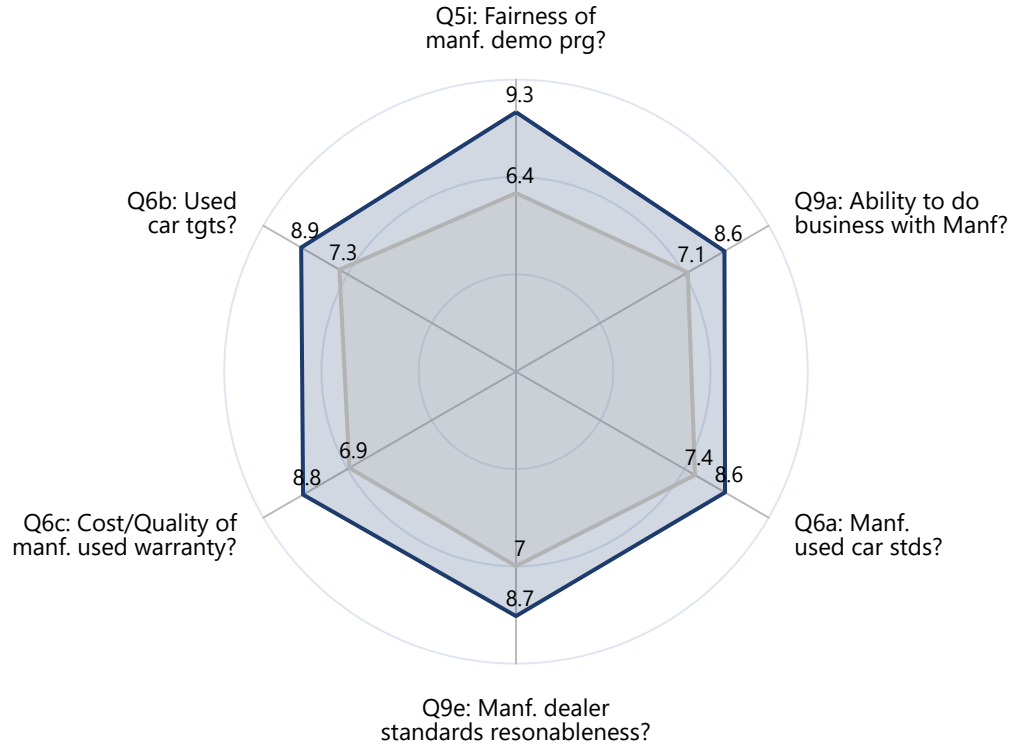
% Change
+17.1%

Score Change
+1.2 pts



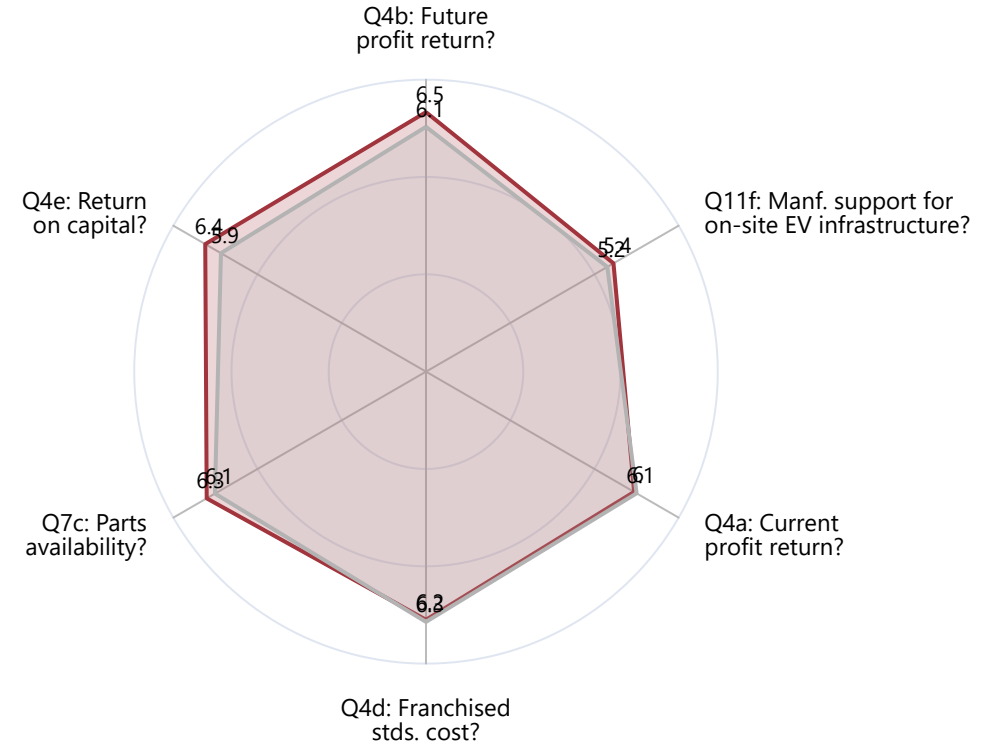
Top 6 Questions vs Average

Brand 2024 ● Average 2024 ●



Bottom 6 Questions vs Average

Brand 2024 ● Average 2024 ●



Question 4 - Value of the franchise	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	6.5	6.0	-0.5	-0.1
Q4b: The future profit return from representing your franchise?	5.9	6.5	+0.6	+0.4
Q4c: The required level of capital investment?	6.7	6.8	+0.1	+0.5
Q4d: The cost required in your dealership to meet franchised standards?	6.7	6.2	-0.5	-0.1
Q4e: The return on capital for your dealership?	6.2	6.4	+0.2	+0.5
Q4f: The quality of guidance provided by your manufacturer to your dealership?	7.4	8.5	+1.1	+2.1
Q4g: The financial support available to your dealership from your manufacturer?	6.1	6.6	+0.5	+0.8

Question 6 - Used car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	8.2	8.6	+0.4	+1.2
Q6b: The targets set by your manufacturer for used cars?	8.0	8.9	+0.9	+1.6
Q6c: The cost and quality of your manufacturer's used car warranties?	7.8	8.8	+1.0	+1.9
Q6d: Your total margin on used car sales?	7.6	7.3	-0.3	+0.3
Q6e: Your manufacturer's used car programme?	7.8	7.7	-0.1	+0.7
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	7.0		-7.0	

Question 5 - New car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	6.3	7.1	+0.8	+0.9
Q5b: Your new car targeting process?	7.2		-7.2	
Q5c: Your ability to meet your manufacturers new car targets in the current market conditions?		6.9	-	+1.0
Q5d: Your total margin on new vehicles?	5.3		-5.3	
Q5e: Your current bonus and rebate rates on new car sales?	5.4		-5.4	
Q5f: Manufacturer inducement to self register vehicles?	3.6	7.0	+3.4	+0.9
Q5g: Manufacturer's new vehicle supply?	7.4		-7.4	
Q5h: The fairness of your manufacturer's new car ordering and stocking policies?	7.2		-7.2	
Q5i: The fairness of your manufacturer's demonstrator programme?	8.3	9.3	+1.0	+2.9
Q5j: The affect the ZEV Mandate is having on obtaining new vehicles for customer orders?		8.4	-	+2.0

Question 7 - Aftersales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	8.3	7.5	-0.8	+0.8
Q7b: Quality of technical support?	8.3	7.8	-0.5	+1.2
Q7c: Availability of parts?	6.9	6.3	-0.6	+0.2
Q7d: Price of manufacturer parts compared with parts factors?	7.8	7.3	-0.5	+1.3
Q7e: Service profitability earnings?	8.4	7.8	-0.6	+1.1
Q7f: Manufacturer service plan rates and recovery?	7.8	7.8	0.0	+1.3
Q7g: The fairness of your manufacturer's warranty policy for you and your customers?	8.1	7.4	-0.7	+0.5
Q7h: Your manufacturer's stocking policy for parts/accessories?	8.1	8.0	-0.1	+1.0

Question 8 - Finance

Score (S23) Score (W24) +/- (pts) vs. Avg.

Q8a: The competitiveness of your manufacturer's finance programme?	7.3	8.2	+0.9	+1.2
Q8b: The reasonableness of the finance targets set by your manufacturer?	7.6		-7.6	
Q8c: The earnings potential of your manufacturer's finance programme?	7.5	7.8	+0.3	+1.5
Q8d: The support you receive from your manufacturer's finance house?	7.4	8.2	+0.8	+1.2

Question 9 - Dealer/Manufacturer relationships

Score (S23) Score (W24) +/- (pts) vs. Avg.

Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	7.8	8.6	+0.8	+1.5
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	7.7	8.2	+0.5	+1.6
Q9c: Your manufacturer's dealer council/franchise board?	8.1	7.8	-0.3	+0.9
Q9d: Your manufacturer's response to your communications with them?	8.2	8.3	+0.1	+1.5
Q9e: Your manufacturer dealer standards are fair and reasonable?	8.1	8.7	+0.6	+1.8
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	8.5	8.3	-0.2	+1.8
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	8.1	8.6	+0.5	+1.8
Q9h: The value of manufacturer field staff to your business?	7.8	8.5	+0.7	+1.7
Q9i: The quality of your manufacturer's training?	8.6	8.6	0.0	+1.5
Q9j: The cost of manufacturer's training?	8.1		-8.1	-6.3
Q9k: Your manufacturer's apprenticeship programme?	8.1	8.6	+0.5	+1.4
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	7.3	7.9	+0.6	+1.4

Question 10 - Product and marketing

Score (S23) Score (W24) +/- (pts) vs. Avg.

Q10a: Frequency of introduction of new models?	8.0	8.2	+0.2	+1.2
Q10b: Product value and pricing?	6.4	6.6	+0.2	-0.1
Q10c: Product advertising?	6.6	7.2	+0.6	+0.4

Question 11 - Electric vehicle/Plug-in vehicles

Score (S23) Score (W24) +/- (pts) vs. Avg.

Q11a: Battery Electric Vehicle products your manufacturer currently offers?	7.7	8.3	+0.6	+2.3
Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	8.1	8.3	+0.2	+1.4
Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	7.7	8.1	+0.4	+1.4
Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	6.8		-6.8	
Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	7.0	7.9	+0.9	+2.3
Q11f: With your manufacturer's support with on-site EV charging infrastructure?	6.2	5.4	-0.8	+0.2
Q11g: That your manufacturer's Electric Vehicle charging information and training equips your customers to successfully transition to an EV?		7.2	-	+1.0

Question 12 & 13 - Overall Rating

Score (S23) Score (W24) +/- (pts) vs. Avg.

Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	7.0	8.2	+1.2	+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?	6.6	8.2	+1.6	+1.6

Overall Manufacturer Rating

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

Summer 2023

7.9

Winter 2024

6.3

Ranking vs. Summer 23
14 vs. 8

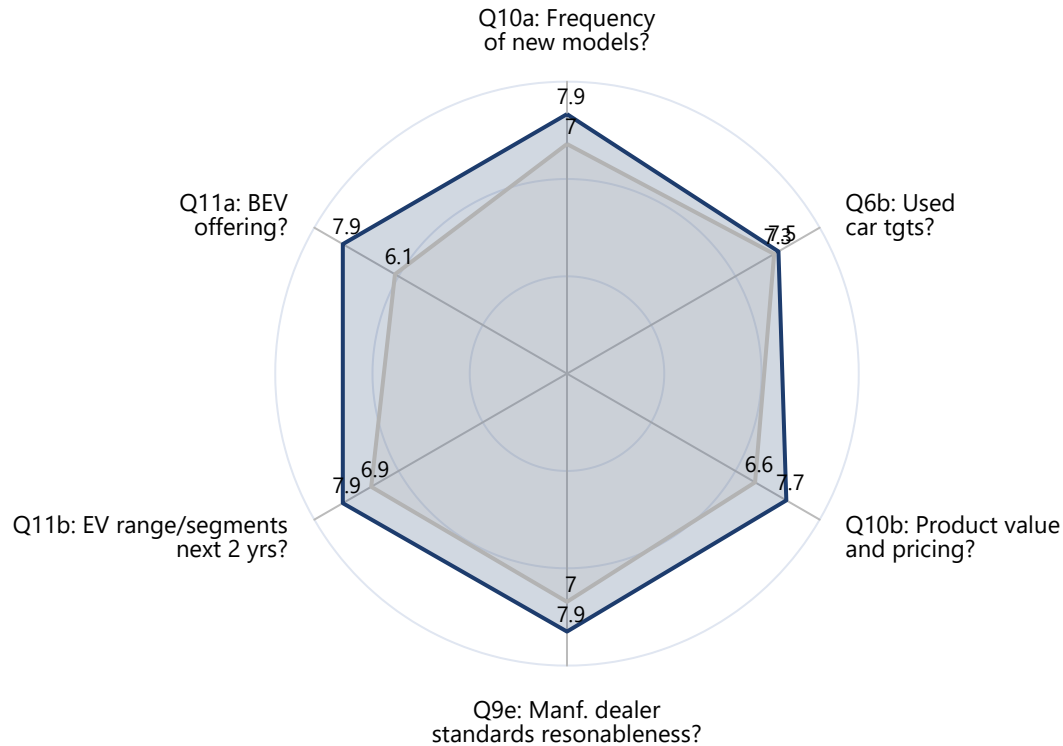
% Change
-20.3%

Score Change
-1.6 pts



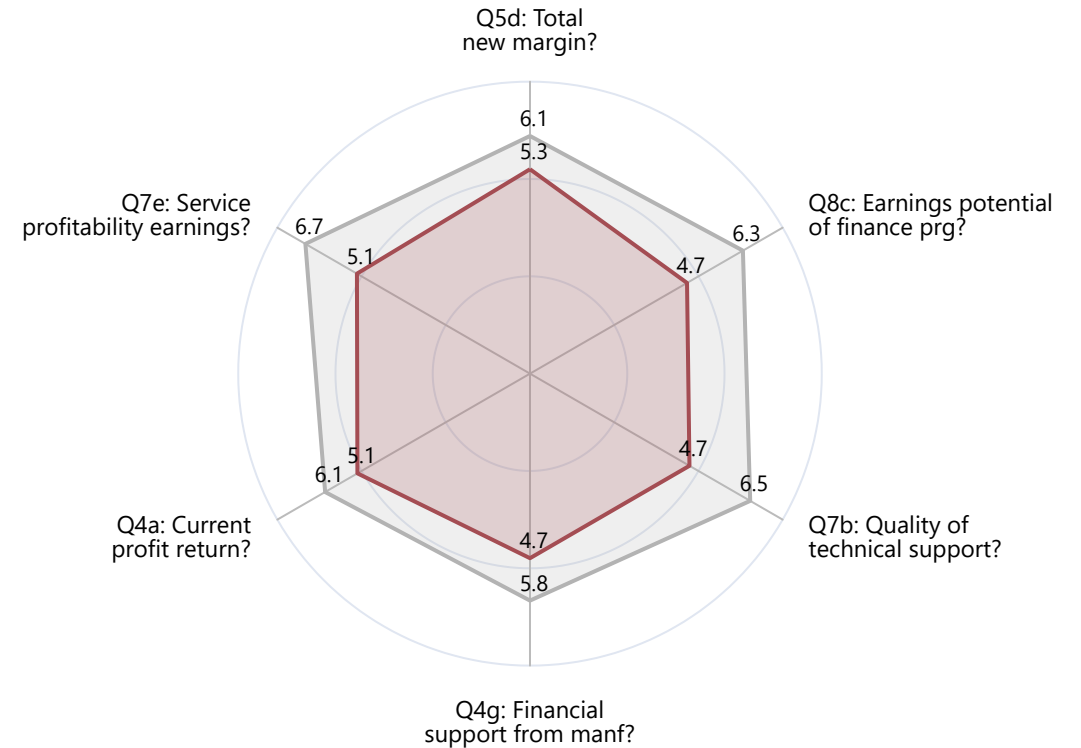
Top 6 Questions vs Average

Brand 2024 ● Average 2024 ●



Bottom 6 Questions vs Average

Brand 2024 ● Average 2024 ●



Question 4 - Value of the franchise	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	7.2	5.1	-2.1	-1.0
Q4b: The future profit return from representing your franchise?	7.6	5.7	-1.9	-0.5
Q4c: The required level of capital investment?	8.5	6.9	-1.6	+0.6
Q4d: The cost required in your dealership to meet franchised standards?	8.6	7.3	-1.3	+1.1
Q4e: The return on capital for your dealership?	7.2	5.7	-1.5	-0.2
Q4f: The quality of guidance provided by your manufacturer to your dealership?	7.2	5.8	-1.4	-0.5
Q4g: The financial support available to your dealership from your manufacturer?	6.9	4.7	-2.2	-1.1

Question 6 - Used car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	8.4	7.0	-1.4	-0.4
Q6b: The targets set by your manufacturer for used cars?	8.6	7.5	-1.1	+0.2
Q6c: The cost and quality of your manufacturer's used car warranties?	8.6	7.0	-1.6	+0.1
Q6d: Your total margin on used car sales?	7.8	6.3	-1.5	-0.6
Q6e: Your manufacturer's used car programme?	7.8	5.9	-1.9	-1.1
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	8.1	6.9	-1.2	-0.0

Question 5 - New car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	7.1	6.1	-1.0	-0.1
Q5b: Your new car targeting process?	7.1	6.0	-1.1	-0.0
Q5c: Your ability to meet your manufacturers new car targets in the current market conditions?		5.9	-	+0.0
Q5d: Your total margin on new vehicles?	6.7	5.3	-1.4	-0.9
Q5e: Your current bonus and rebate rates on new car sales?	7.5	5.4	-2.1	-0.7
Q5f: Manufacturer inducement to self register vehicles?	7.7	6.0	-1.7	-0.1
Q5g: Manufacturer's new vehicle supply?	7.4	7.2	-0.2	+0.8
Q5h: The fairness of your manufacturer's new car ordering and stocking policies?	7.1	6.2	-0.9	-0.4
Q5i: The fairness of your manufacturer's demonstrator programme?	7.9	6.5	-1.4	+0.1
Q5j: The affect the ZEV Mandate is having on obtaining new vehicles for customer orders?		7.4	-	+1.1

Question 7 - Aftersales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	8.6	7.3	-1.3	+0.6
Q7b: Quality of technical support?	6.9	4.7	-2.2	-1.8
Q7c: Availability of parts?	7.5	5.3	-2.2	-0.8
Q7d: Price of manufacturer parts compared with parts factors?	7.7	5.9	-1.8	-0.0
Q7e: Service profitability earnings?	7.1	5.1	-2.0	-1.5
Q7f: Manufacturer service plan rates and recovery?	7.5	5.9	-1.6	-0.5
Q7g: The fairness of your manufacturer's warranty policy for you and your customers?	7.1	5.7	-1.4	-1.3
Q7h: Your manufacturer's stocking policy for parts/accessories?	8.2	6.5	-1.7	-0.5

Question 8 - Finance					Question 10 - Product and marketing				
	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.		Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	7.9	6.2	-1.7	-0.8	Q10a: Frequency of introduction of new models?	9.1	7.9	-1.2	+0.9
Q8b: The reasonableness of the finance targets set by your manufacturer?	8.4	6.6	-1.8	-0.6	Q10b: Product value and pricing?	9.1	7.7	-1.4	+1.1
Q8c: The earnings potential of your manufacturer's finance programme?	7.1	4.7	-2.4	-1.7	Q10c: Product advertising?	8.0	5.9	-2.1	-0.8
Q8d: The support you receive from your manufacturer's finance house?	8.2	5.9	-2.3	-1.1	Question 11 - Electric vehicle/Plug-in vehicles				
Question 9 - Dealer/Manufacturer relationships					Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	8.0	6.6	-1.4	-0.5	Q11a: Battery Electric Vehicle products your manufacturer currently offers?	9.1	7.9	-1.2	+1.8
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	7.8	6.0	-1.8	-0.6	Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	9.2	7.9	-1.3	+1.0
Q9c: Your manufacturer's dealer council/franchise board?	7.9	6.1	-1.8	-0.7	Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	8.6	7.4	-1.2	+0.7
Q9d: Your manufacturer's response to your communications with them?	7.8	7.0	-0.8	+0.1	Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	8.3	6.7	-1.6	+1.2
Q9e: Your manufacturer dealer standards are fair and reasonable?	8.8	7.9	-0.9	+0.9	Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	8.2	6.6	-1.6	+1.0
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	8.8	7.1	-1.7	+0.6	Q11f: With your manufacturer's support with on-site EV charging infrastructure?	7.6	5.6	-2.0	+0.3
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	8.3	7.2	-1.1	+0.4	Q11g: That your manufacturer's Electric Vehicle charging information and training equips your customers to successfully transition to an EV?		6.1	-	-0.1
Q9h: The value of manufacturer field staff to your business?	8.1	6.3	-1.8	-0.5	Question 12 & 13 - Overall Rating				
Q9i: The quality of your manufacturer's training?	7.5	6.2	-1.3	-0.9	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9j: The cost of manufacturer's training?	8.5	6.7	-1.8	+0.3	Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	7.9	6.3	-1.6	-0.3
Q9k: Your manufacturer's apprenticeship programme?	8.6	6.2	-2.4	-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?	7.8	6.3	-1.5	-0.3
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	8.3	6.8	-1.5	+0.4					

Overall Manufacturer Rating

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

Summer 2023

9.0

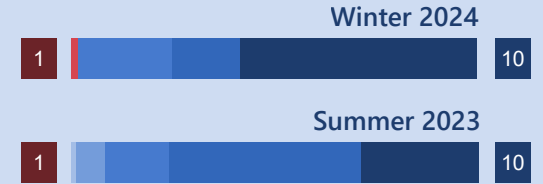
Winter 2024

9.2

Ranking vs. Summer 23
1 vs. 3

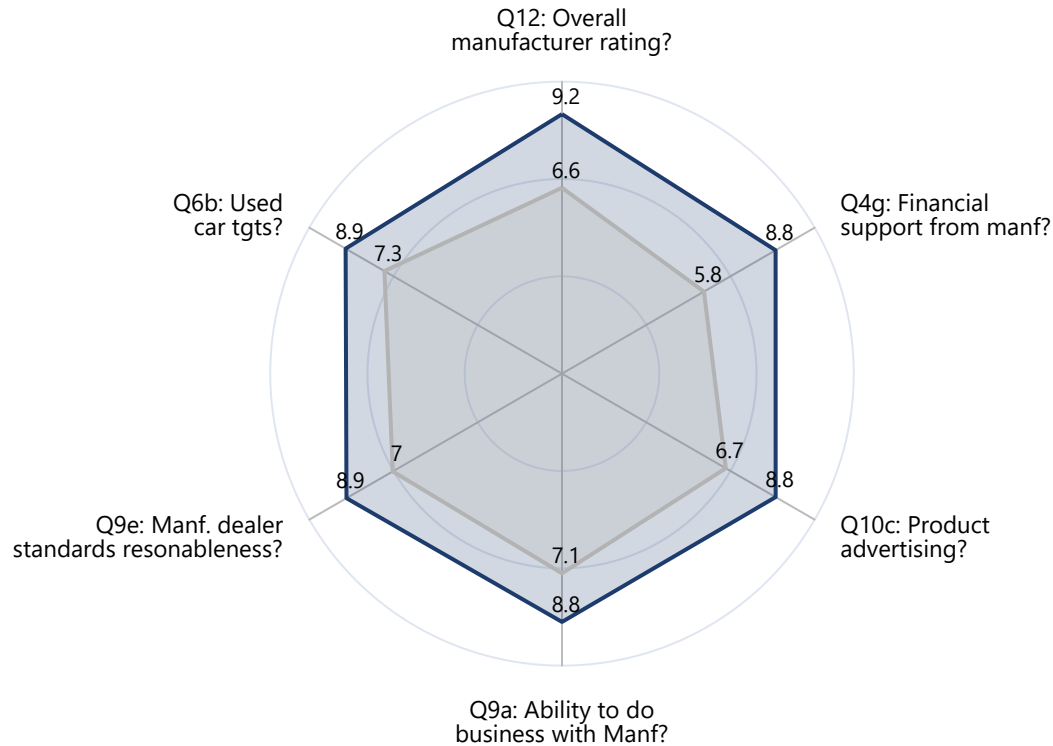
% Change
+2.2%

Score Change
+0.2 pts



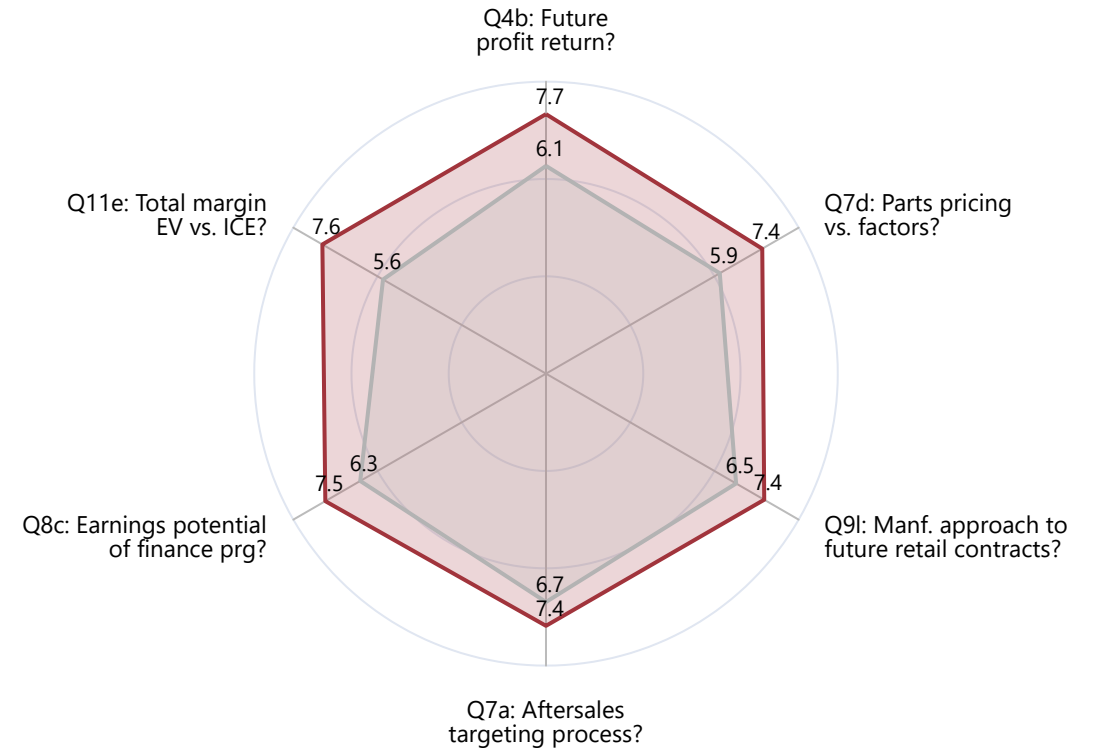
Top 6 Questions vs Average

Brand 2024 ● | Average 2024 ●



Bottom 6 Questions vs Average

Brand 2024 ● | Average 2024 ●



Question 4 - Value of the franchise	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	8.2	8.3	+0.1	+2.2
Q4b: The future profit return from representing your franchise?	7.1	7.7	+0.6	+1.5
Q4c: The required level of capital investment?	7.8	8.2	+0.4	+1.9
Q4d: The cost required in your dealership to meet franchised standards?	7.8	7.7	-0.1	+1.4
Q4e: The return on capital for your dealership?	7.9	7.8	-0.1	+1.9
Q4f: The quality of guidance provided by your manufacturer to your dealership?	8.5	8.3	-0.2	+1.9
Q4g: The financial support available to your dealership from your manufacturer?	8.0	8.8	+0.8	+2.9

Question 6 - Used car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	8.5	8.4	-0.1	+1.0
Q6b: The targets set by your manufacturer for used cars?	8.9	8.9	0.0	+1.6
Q6c: The cost and quality of your manufacturer's used car warranties?	8.6	8.6	0.0	+1.7
Q6d: Your total margin on used car sales?	8.1	8.2	+0.1	+1.3
Q6e: Your manufacturer's used car programme?	8.4	7.9	-0.5	+0.8
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	8.7	7.8	-0.9	+0.9

Question 5 - New car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	8.5	8.2	-0.3	+2.0
Q5b: Your new car targeting process?	8.5	8.4	-0.1	+2.4
Q5c: Your ability to meet your manufacturers new car targets in the current market conditions?		8.4	-	+2.5
Q5d: Your total margin on new vehicles?	8.1	8.3	+0.2	+2.2
Q5e: Your current bonus and rebate rates on new car sales?	8.3	8.3	0.0	+2.1
Q5f: Manufacturer inducement to self register vehicles?	8.6	8.4	-0.2	+2.3
Q5g: Manufacturer's new vehicle supply?	7.4	7.7	+0.3	+1.3
Q5h: The fairness of your manufacturer's new car ordering and stocking policies?	8.4	8.5	+0.1	+2.0
Q5i: The fairness of your manufacturer's demonstrator programme?	8.5	8.5	0.0	+2.1
Q5j: The affect the ZEV Mandate is having on obtaining new vehicles for customer orders?		8.3	-	+2.0

Question 7 - Aftersales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	7.9	7.4	-0.5	+0.7
Q7b: Quality of technical support?	8.6	8.2	-0.4	+1.7
Q7c: Availability of parts?	8.1	8.6	+0.5	+2.5
Q7d: Price of manufacturer parts compared with parts factors?	7.3	7.4	+0.1	+1.4
Q7e: Service profitability earnings?	7.9	7.9	0.0	+1.2
Q7f: Manufacturer service plan rates and recovery?	8.0	8.1	+0.1	+1.6
Q7g: The fairness of your manufacturer's warranty policy for you and your customers?	8.6	8.3	-0.3	+1.4
Q7h: Your manufacturer's stocking policy for parts/accessories?	8.2	8.4	+0.2	+1.4

Question 8 - Finance					Question 10 - Product and marketing				
	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.		Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	7.5	7.8	+0.3	+0.8	Q10a: Frequency of introduction of new models?	8.4	8.4	0.0	+1.4
Q8b: The reasonableness of the finance targets set by your manufacturer?	8.1	8.4	+0.3	+1.1	Q10b: Product value and pricing?	8.3	8.3	0.0	+1.7
Q8c: The earnings potential of your manufacturer's finance programme?	7.3	7.5	+0.2	+1.2	Q10c: Product advertising?	8.5	8.8	+0.3	+2.1
Q8d: The support you receive from your manufacturer's finance house?	7.6	7.8	+0.2	+0.8	Question 11 - Electric vehicle/Plug-in vehicles				
Question 9 - Dealer/Manufacturer relationships					Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	8.7	8.8	+0.1	+1.7	Q11a: Battery Electric Vehicle products your manufacturer currently offers?	7.3	7.8	+0.5	+1.7
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	8.7	8.5	-0.2	+1.8	Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	8.7	8.5	-0.2	+1.6
Q9c: Your manufacturer's dealer council/franchise board?	8.4	8.3	-0.1	+1.4	Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	8.3	8.1	-0.2	+1.4
Q9d: Your manufacturer's response to your communications with them?	8.8	8.7	-0.1	+1.8	Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	7.6	7.7	+0.1	+2.2
Q9e: Your manufacturer dealer standards are fair and reasonable?	8.7	8.9	+0.2	+1.9	Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	7.5	7.6	+0.1	+2.1
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	8.4	8.6	+0.2	+2.1	Q11f: With your manufacturer's support with on-site EV charging infrastructure?	7.8	7.8	0.0	+2.5
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	8.6	8.4	-0.2	+1.6	Q11g: That your manufacturer's Electric Vehicle charging information and training equips your customers to successfully transition to an EV?		8.1	-	+1.9
Q9h: The value of manufacturer field staff to your business?	8.5	8.4	-0.1	+1.5	Question 12 & 13 - Overall Rating				
Q9i: The quality of your manufacturer's training?	9.0	8.7	-0.3	+1.6	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9j: The cost of manufacturer's training?	8.2	8.1	-0.1	+1.8	Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	9.0	9.2	+0.2	+2.6
Q9k: Your manufacturer's apprenticeship programme?	9.0	7.7	-1.3	+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?	8.9	8.5	-0.4	+2.0
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	8.2	7.4	-0.8	+1.0					

Overall Manufacturer Rating

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

Summer 2023

8.0

Winter 2024

8.0

Ranking vs. Summer 23
7 vs. 7

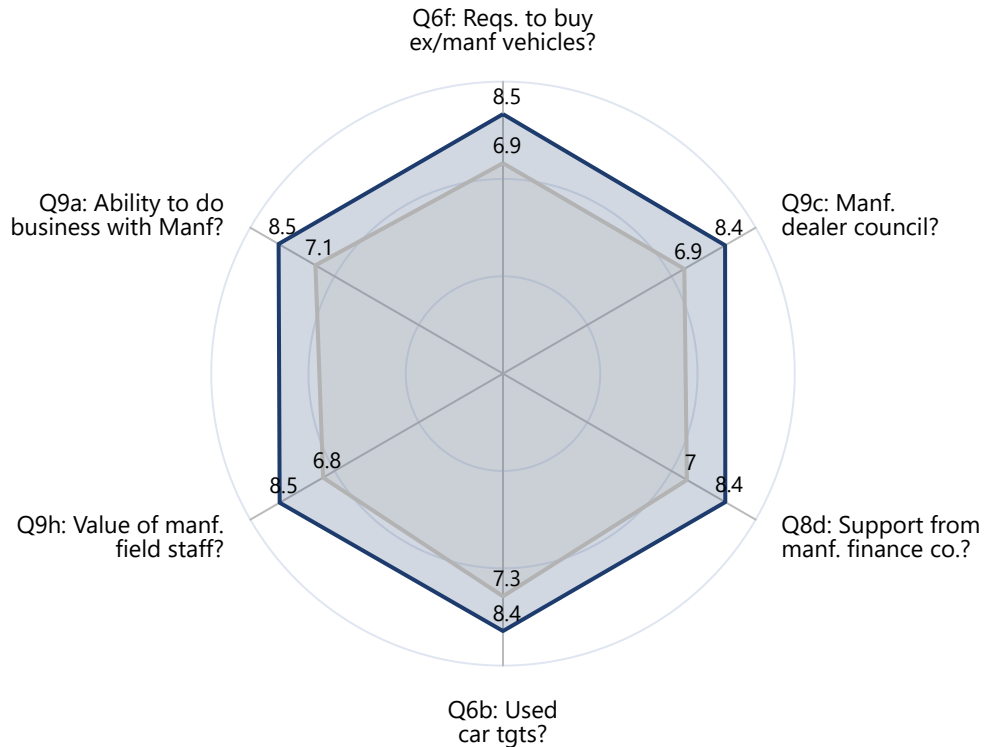
% Change
0.0%

Score Change
0.0 pts



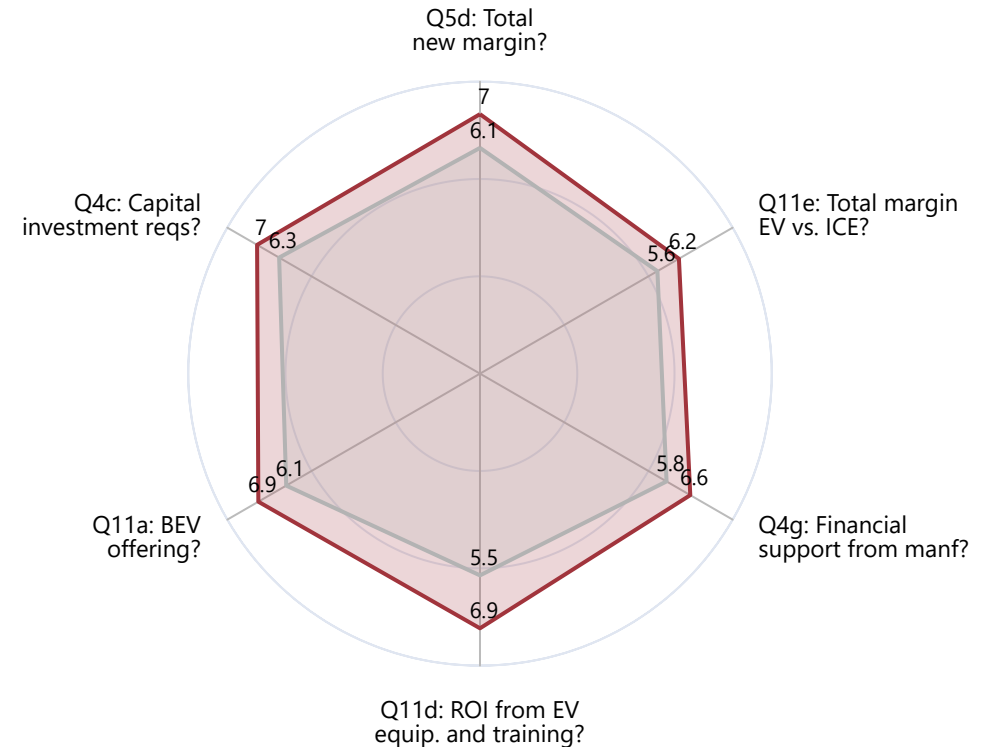
Top 6 Questions vs Average

Brand 2024 ● Average 2024 ●



Bottom 6 Questions vs Average

Brand 2024 ● Average 2024 ●



Question 4 - Value of the franchise	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	7.0	7.2	+0.2	+1.1
Q4b: The future profit return from representing your franchise?	7.2	7.4	+0.2	+1.3
Q4c: The required level of capital investment?	7.3	7.0	-0.3	+0.7
Q4d: The cost required in your dealership to meet franchised standards?	7.3	7.2	-0.1	+0.9
Q4e: The return on capital for your dealership?	7.3	7.2	-0.1	+1.2
Q4f: The quality of guidance provided by your manufacturer to your dealership?	8.2	7.9	-0.3	+1.5
Q4g: The financial support available to your dealership from your manufacturer?	6.9	6.6	-0.3	+0.7

Question 6 - Used car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	8.5	8.3	-0.2	+0.9
Q6b: The targets set by your manufacturer for used cars?	8.7	8.4	-0.3	+1.1
Q6c: The cost and quality of your manufacturer's used car warranties?	8.2	7.3	-0.9	+0.4
Q6d: Your total margin on used car sales?	7.4	7.2	-0.2	+0.3
Q6e: Your manufacturer's used car programme?	8.3	8.1	-0.2	+1.0
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	8.2	8.5	+0.3	+1.6

Question 5 - New car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	7.4	7.3	-0.1	+1.1
Q5b: Your new car targeting process?	7.4	7.5	+0.1	+1.5
Q5c: Your ability to meet your manufacturers new car targets in the current market conditions?		7.4	-	+1.6
Q5d: Your total margin on new vehicles?	7.4	7.0	-0.4	+0.9
Q5e: Your current bonus and rebate rates on new car sales?	7.3	7.5	+0.2	+1.3
Q5f: Manufacturer inducement to self register vehicles?	8.1	8.1	0.0	+2.0
Q5g: Manufacturer's new vehicle supply?	7.6	8.4	+0.8	+2.0
Q5h: The fairness of your manufacturer's new car ordering and stocking policies?	8.3	7.7	-0.6	+1.2
Q5i: The fairness of your manufacturer's demonstrator programme?	7.8	7.3	-0.5	+0.9
Q5j: The affect the ZEV Mandate is having on obtaining new vehicles for customer orders?		7.6	-	+1.3

Question 7 - Aftersales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	7.5	7.6	+0.1	+0.8
Q7b: Quality of technical support?	8.1	8.0	-0.1	+1.4
Q7c: Availability of parts?	7.4	7.8	+0.4	+1.7
Q7d: Price of manufacturer parts compared with parts factors?	7.3	7.3	0.0	+1.4
Q7e: Service profitability earnings?	7.8	7.3	-0.5	+0.7
Q7f: Manufacturer service plan rates and recovery?	8.1	7.8	-0.3	+1.4
Q7g: The fairness of your manufacturer's warranty policy for you and your customers?	8.1	8.0	-0.1	+1.1
Q7h: Your manufacturer's stocking policy for parts/accessories?	7.8	7.6	-0.2	+0.6

Question 8 - Finance					Question 10 - Product and marketing				
	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.		Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	8.0	8.3	+0.3	+1.2	Q10a: Frequency of introduction of new models?	6.4	7.0	+0.6	+0.0
Q8b: The reasonableness of the finance targets set by your manufacturer?	8.2	7.9	-0.3	+0.6	Q10b: Product value and pricing?	7.8	7.9	+0.1	+1.2
Q8c: The earnings potential of your manufacturer's finance programme?	7.9	8.0	+0.1	+1.7	Q10c: Product advertising?	7.4	8.0	+0.6	+1.2
Q8d: The support you receive from your manufacturer's finance house?	8.3	8.4	+0.1	+1.5	Question 11 - Electric vehicle/Plug-in vehicles				
Question 9 - Dealer/Manufacturer relationships					Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	8.5	8.5	0.0	+1.4	Q11a: Battery Electric Vehicle products your manufacturer currently offers?	6.1	6.9	+0.8	+0.9
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	8.1	8.0	-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?	6.2	8.0	+1.8	+1.1
Q9c: Your manufacturer's dealer council/franchise board?	8.4	8.4	0.0	+1.5	Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	6.9	7.6	+0.7	+0.9
Q9d: Your manufacturer's response to your communications with them?	8.2	7.9	-0.3	+1.0	Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	6.1	6.9	+0.8	+1.4
Q9e: Your manufacturer dealer standards are fair and reasonable?	7.9	7.9	0.0	+0.9	Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	4.4	6.2	+1.8	+0.7
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	6.6	7.1	+0.5	+0.6	Q11f: With your manufacturer's support with on-site EV charging infrastructure?	6.7	7.1	+0.4	+1.9
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	7.5	7.5	0.0	+0.7	Q11g: That your manufacturer's Electric Vehicle charging information and training equips your customers to successfully transition to an EV?		7.5	-	+1.2
Q9h: The value of manufacturer field staff to your business?	8.4	8.5	+0.1	+1.6	Question 12 & 13 - Overall Rating				
Q9i: The quality of your manufacturer's training?	8.6	7.4	-1.2	+0.3	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9j: The cost of manufacturer's training?	8.4	7.3	-1.1	+1.0	Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	8.0	8.0	0.0	+1.4
Q9k: Your manufacturer's apprenticeship programme?	8.2	7.6	-0.6	+0.4	Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	7.9	8.0	+0.1	+1.5
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	8.1	8.0	-0.1	+1.6					

Overall Manufacturer Rating

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

Summer 2023

3.3

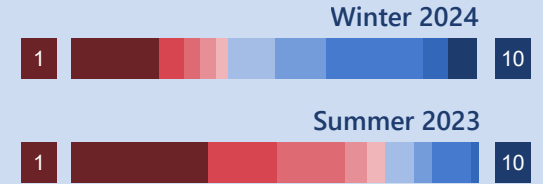
Winter 2024

5.5

Ranking vs. Summer 23
23 vs. 25

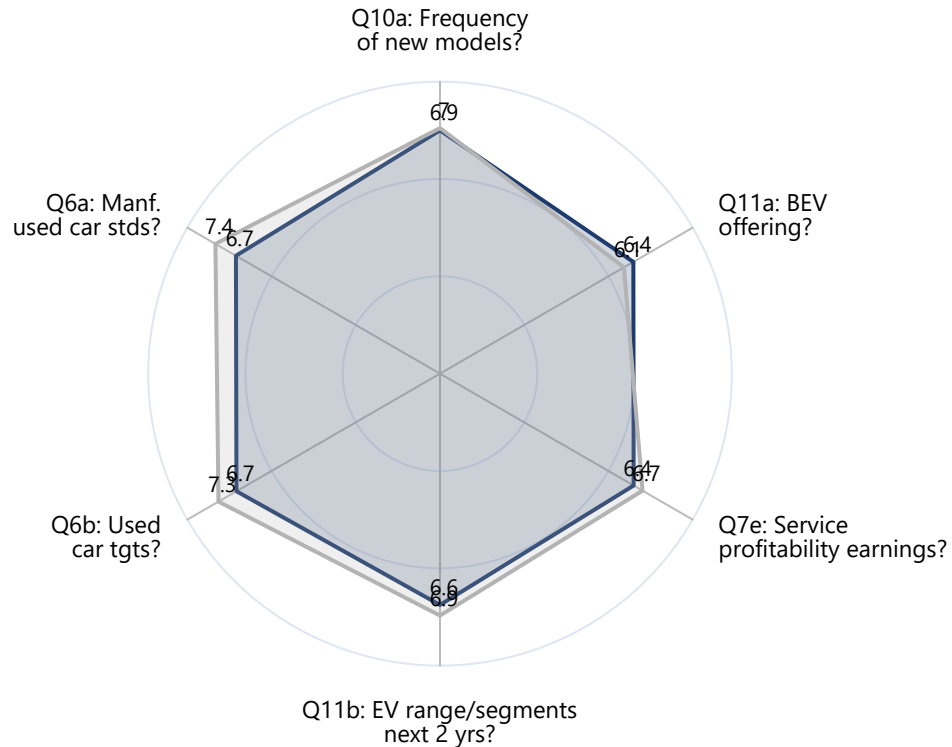
% Change
+66.7%

Score Change
+2.2 pts



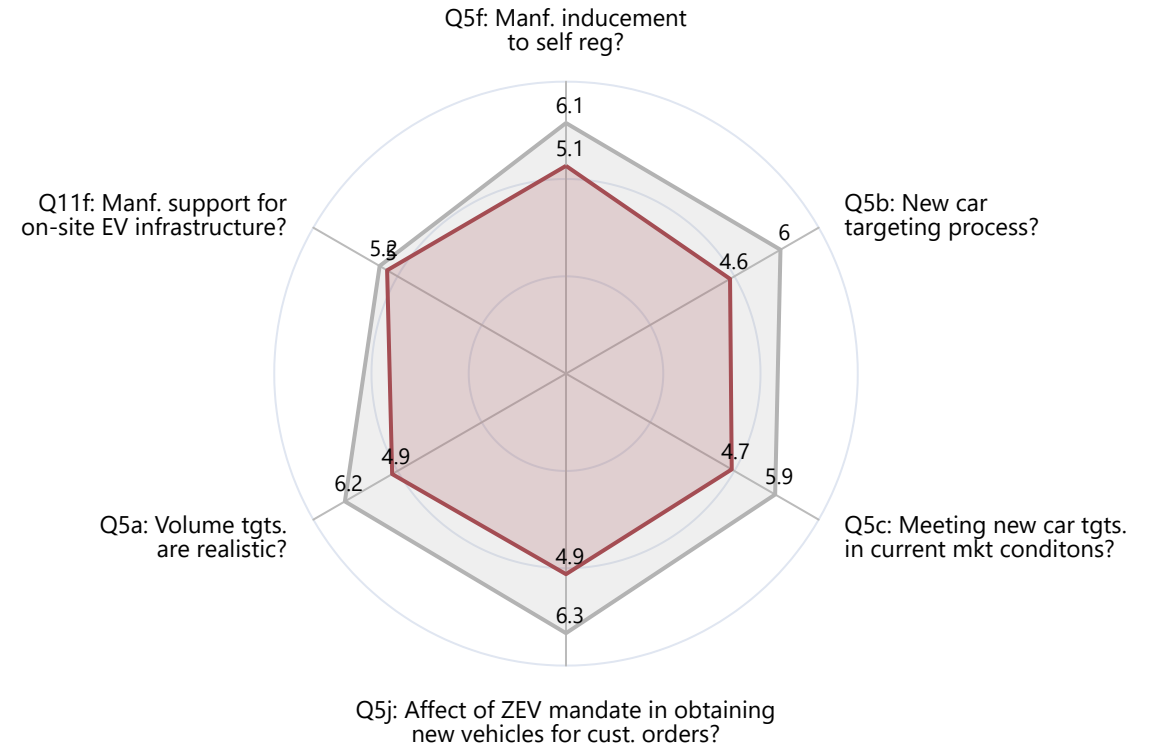
Top 6 Questions vs Average

Brand 2024 ● Average 2024 ●



Bottom 6 Questions vs Average

Brand 2024 ● Average 2024 ●



Question 4 - Value of the franchise	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	3.2	5.2	+2.0	-0.9
Q4b: The future profit return from representing your franchise?	3.6	5.7	+2.1	-0.4
Q4c: The required level of capital investment?	3.6	5.4	+1.8	-0.9
Q4d: The cost required in your dealership to meet franchised standards?	3.7	5.4	+1.7	-0.9
Q4e: The return on capital for your dealership?	3.4	5.1	+1.7	-0.8
Q4f: The quality of guidance provided by your manufacturer to your dealership?	3.1	5.2	+2.1	-1.2
Q4g: The financial support available to your dealership from your manufacturer?	3.1	5.2	+2.1	-0.6

Question 6 - Used car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	5.2	6.7	+1.5	-0.7
Q6b: The targets set by your manufacturer for used cars?	5.3	6.7	+1.4	-0.6
Q6c: The cost and quality of your manufacturer's used car warranties?	4.9	6.1	+1.2	-0.8
Q6d: Your total margin on used car sales?	5.4	6.2	+0.8	-0.8
Q6e: Your manufacturer's used car programme?	5.0	6.2	+1.2	-0.8
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	4.8	6.1	+1.3	-0.8

Question 5 - New car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	3.7	4.9	+1.2	-1.3
Q5b: Your new car targeting process?	3.5	4.6	+1.1	-1.4
Q5c: Your ability to meet your manufacturers new car targets in the current market conditions?		4.7	-	-1.2
Q5d: Your total margin on new vehicles?	3.1	5.5	+2.4	-0.6
Q5e: Your current bonus and rebate rates on new car sales?	3.0	5.9	+2.9	-0.2
Q5f: Manufacturer inducement to self register vehicles?	3.6	5.1	+1.5	-1.0
Q5g: Manufacturer's new vehicle supply?	3.3	5.3	+2.0	-1.1
Q5h: The fairness of your manufacturer's new car ordering and stocking policies?	3.2	5.4	+2.2	-1.1
Q5i: The fairness of your manufacturer's demonstrator programme?	3.7	5.4	+1.7	-1.0
Q5j: The affect the ZEV Mandate is having on obtaining new vehicles for customer orders?		4.9	-	-1.4

Question 7 - Aftersales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	4.9	6.3	+1.4	-0.4
Q7b: Quality of technical support?	4.3	5.6	+1.3	-0.9
Q7c: Availability of parts?	3.7	5.5	+1.8	-0.6
Q7d: Price of manufacturer parts compared with parts factors?	4.0	5.7	+1.7	-0.2
Q7e: Service profitability earnings?	4.8	6.4	+1.6	-0.3
Q7f: Manufacturer service plan rates and recovery?	4.7	6.4	+1.7	-0.1
Q7g: The fairness of your manufacturer's warranty policy for you and your customers?	4.6	6.3	+1.7	-0.7
Q7h: Your manufacturer's stocking policy for parts/accessories?	4.9	6.2	+1.3	-0.8

Question 8 - Finance

Score (S23) Score (W24) +/- (pts) vs. Avg.

Q8a: The competitiveness of your manufacturer's finance programme?	4.1	6.0	+1.9	-1.1
Q8b: The reasonableness of the finance targets set by your manufacturer?	4.4	6.3	+1.9	-1.0
Q8c: The earnings potential of your manufacturer's finance programme?	3.7	5.6	+1.9	-0.7
Q8d: The support you receive from your manufacturer's finance house?	4.1	6.3	+2.2	-0.7

Question 9 - Dealer/Manufacturer relationships

Score (S23) Score (W24) +/- (pts) vs. Avg.

Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	3.2	5.6	+2.4	-1.5
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	3.2	5.3	+2.1	-1.3
Q9c: Your manufacturer's dealer council/franchise board?	4.6	5.5	+0.9	-1.3
Q9d: Your manufacturer's response to your communications with them?	3.3	5.3	+2.0	-1.6
Q9e: Your manufacturer dealer standards are fair and reasonable?	4.1	5.7	+1.6	-1.2
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	3.5	5.6	+2.1	-0.9
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	3.8	5.9	+2.1	-1.0
Q9h: The value of manufacturer field staff to your business?	3.5	5.6	+2.1	-1.2
Q9i: The quality of your manufacturer's training?	4.7	5.9	+1.2	-1.2
Q9j: The cost of manufacturer's training?	4.1	5.8	+1.7	-0.5
Q9k: Your manufacturer's apprenticeship programme?	5.1	6.2	+1.1	-1.0
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	3.3	5.6	+2.3	-0.8

Question 10 - Product and marketing

Score (S23) Score (W24) +/- (pts) vs. Avg.

Q10a: Frequency of introduction of new models?	6.1	6.9	+0.8	-0.1
Q10b: Product value and pricing?	4.5	6.0	+1.5	-0.7
Q10c: Product advertising?	4.2	6.1	+1.9	-0.6

Question 11 - Electric vehicle/Plug-in vehicles

Score (S23) Score (W24) +/- (pts) vs. Avg.

Q11a: Battery Electric Vehicle products your manufacturer currently offers?	5.4	6.4	+1.0	+0.3
Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	5.9	6.6	+0.7	-0.3
Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	5.3	6.1	+0.8	-0.6
Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	3.8	5.1	+1.3	-0.3
Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	3.3	5.2	+1.9	-0.4
Q11f: With your manufacturer's support with on-site EV charging infrastructure?	3.2	5.0	+1.8	-0.2
Q11g: That your manufacturer's Electric Vehicle charging information and training equips your customers to successfully transition to an EV?		5.6	-	-0.7

Question 12 & 13 - Overall Rating

Score (S23) Score (W24) +/- (pts) vs. Avg.

Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	3.3	5.5	+2.2	-1.1
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	5.5	+2.1	-1.1

Overall Manufacturer Rating

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

Summer 2023

6.2

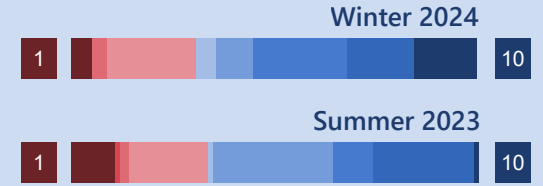
Winter 2024

6.9

Ranking vs. Summer 23
12 vs. 17

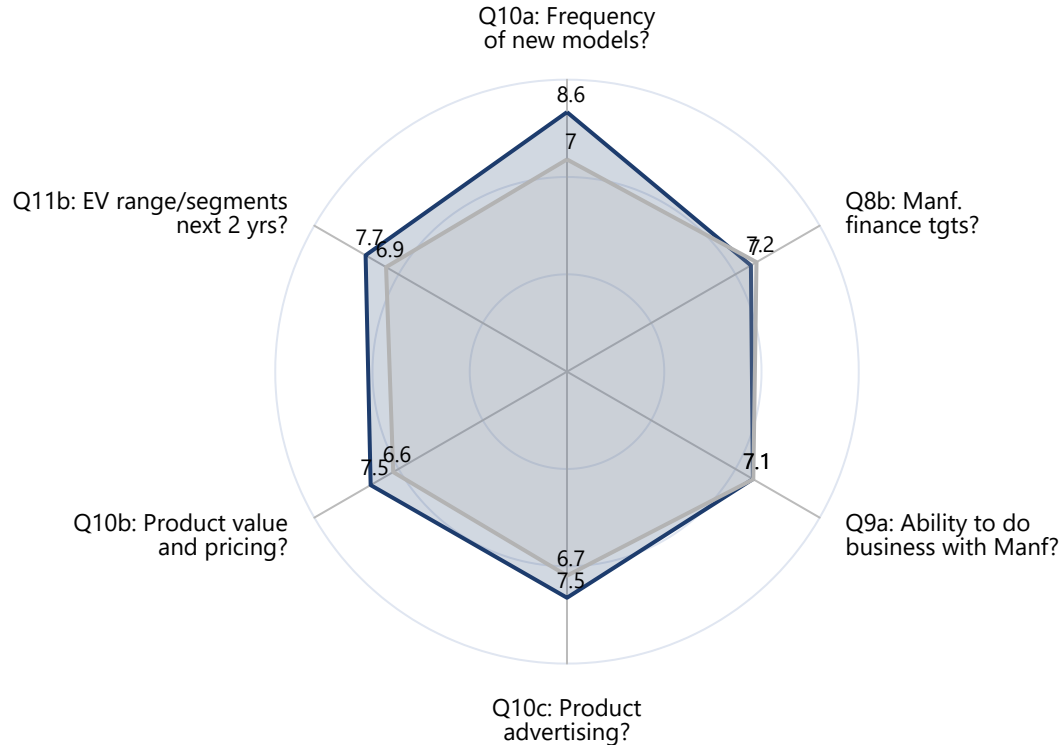
% Change
+11.3%

Score Change
+0.7 pts



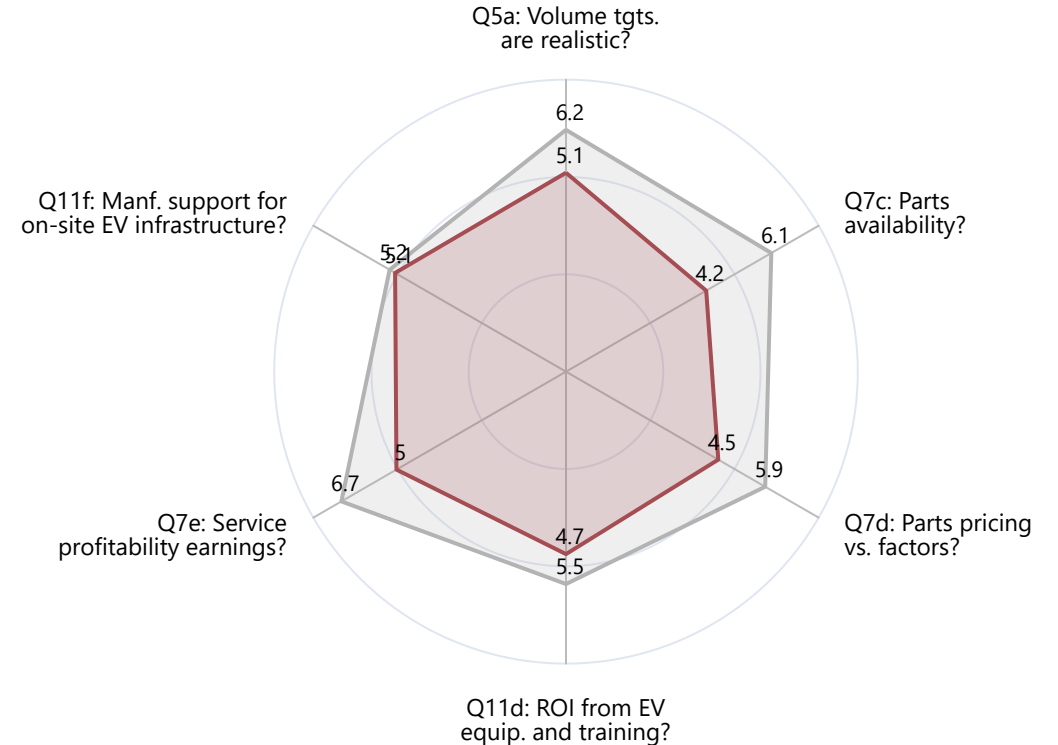
Top 6 Questions vs Average

Brand 2024 ● Average 2024 ●



Bottom 6 Questions vs Average

Brand 2024 ● Average 2024 ●



Question 4 - Value of the franchise	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	5.9	5.4	-0.5	-0.7
Q4b: The future profit return from representing your franchise?	6.6	6.4	-0.2	+0.2
Q4c: The required level of capital investment?	5.8	5.9	+0.1	-0.4
Q4d: The cost required in your dealership to meet franchised standards?	5.6	5.8	+0.2	-0.5
Q4e: The return on capital for your dealership?	5.6	5.7	+0.1	-0.2
Q4f: The quality of guidance provided by your manufacturer to your dealership?	6.1	6.4	+0.3	+0.1
Q4g: The financial support available to your dealership from your manufacturer?	5.2	5.5	+0.3	-0.3

Question 6 - Used car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	5.4	5.4	0.0	-2.0
Q6b: The targets set by your manufacturer for used cars?	3.8		-3.8	
Q6c: The cost and quality of your manufacturer's used car warranties?	5.2	5.5	+0.3	-1.4
Q6d: Your total margin on used car sales?	6.7	6.4	-0.3	-0.5
Q6e: Your manufacturer's used car programme?	5.0	5.3	+0.3	-1.7
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	5.9	6.7	+0.8	-0.2

Question 5 - New car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	5.5	5.1	-0.4	-1.1
Q5b: Your new car targeting process?	5.4	5.3	-0.1	-0.8
Q5c: Your ability to meet your manufacturers new car targets in the current market conditions?		5.2	-	-0.7
Q5d: Your total margin on new vehicles?	5.1	5.8	+0.7	-0.3
Q5e: Your current bonus and rebate rates on new car sales?	5.3	5.8	+0.5	-0.3
Q5f: Manufacturer inducement to self register vehicles?	6.0	5.8	-0.2	-0.3
Q5g: Manufacturer's new vehicle supply?	5.8	7.0	+1.2	+0.6
Q5h: The fairness of your manufacturer's new car ordering and stocking policies?	6.4	5.6	-0.8	-1.0
Q5i: The fairness of your manufacturer's demonstrator programme?	6.5	6.1	-0.4	-0.3
Q5j: The affect the ZEV Mandate is having on obtaining new vehicles for customer orders?		6.0	-	-0.3

Question 7 - Aftersales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	5.7	5.5	-0.2	-1.2
Q7b: Quality of technical support?	5.7	6.6	+0.9	+0.0
Q7c: Availability of parts?	3.1	4.2	+1.1	-1.9
Q7d: Price of manufacturer parts compared with parts factors?	4.8	4.5	-0.3	-1.4
Q7e: Service profitability earnings?	5.4	5.0	-0.4	-1.6
Q7f: Manufacturer service plan rates and recovery?	6.1	5.5	-0.6	-0.9
Q7g: The fairness of your manufacturer's warranty policy for you and your customers?	5.8	5.9	+0.1	-1.1
Q7h: Your manufacturer's stocking policy for parts/accessories?	5.3	5.6	+0.3	-1.4

Question 8 - Finance					Question 10 - Product and marketing				
	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.		Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	7.0	6.8	-0.2	-0.2	Q10a: Frequency of introduction of new models?	8.0	8.6	+0.6	+1.6
Q8b: The reasonableness of the finance targets set by your manufacturer?	7.1	7.0	-0.1	-0.2	Q10b: Product value and pricing?	7.1	7.5	+0.4	+0.9
Q8c: The earnings potential of your manufacturer's finance programme?	5.9	5.6	-0.3	-0.8	Q10c: Product advertising?	6.9	7.5	+0.6	+0.7
Q8d: The support you receive from your manufacturer's finance house?	6.6	6.6	0.0	-0.4	Question 11 - Electric vehicle/Plug-in vehicles				
Question 9 - Dealer/Manufacturer relationships					Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	6.6	7.1	+0.5	-0.0	Q11a: Battery Electric Vehicle products your manufacturer currently offers?	5.9	6.3	+0.4	+0.3
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	6.0	6.3	+0.3	-0.3	Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	7.0	7.7	+0.7	+0.8
Q9c: Your manufacturer's dealer council/franchise board?	6.4	6.5	+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	6.5	-0.2	-0.1
Q9d: Your manufacturer's response to your communications with them?	6.3	6.4	+0.1	-0.5	Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	4.6	4.7	+0.1	-0.8
Q9e: Your manufacturer dealer standards are fair and reasonable?	5.6	6.1	+0.5	-0.8	Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	4.7	5.2	+0.5	-0.4
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	5.0	5.9	+0.9	-0.6	Q11f: With your manufacturer's support with on-site EV charging infrastructure?	4.0	5.1	+1.1	-0.2
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	5.6	6.2	+0.6	-0.6	Q11g: That your manufacturer's Electric Vehicle charging information and training equips your customers to successfully transition to an EV?		6.1	-	-0.1
Q9h: The value of manufacturer field staff to your business?	6.6	6.8	+0.2	-0.0	Question 12 & 13 - Overall Rating				
Q9i: The quality of your manufacturer's training?	6.7	6.9	+0.2	-0.2	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9j: The cost of manufacturer's training?	5.5	5.7	+0.2	-0.6	Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	6.2	6.9	+0.7	+0.2
Q9k: Your manufacturer's apprenticeship programme?	5.4	6.5	+1.1	-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?	6.2	6.8	+0.6	+0.2
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	6.0	6.1	+0.1	-0.4					

Overall Manufacturer Rating

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

Summer 2023

3.9

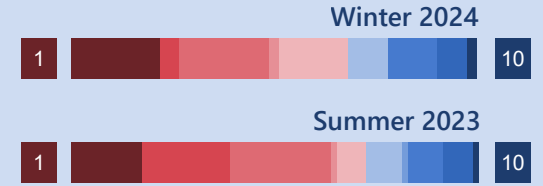
Winter 2024

4.4

Ranking vs. Summer 23
28 vs. 23

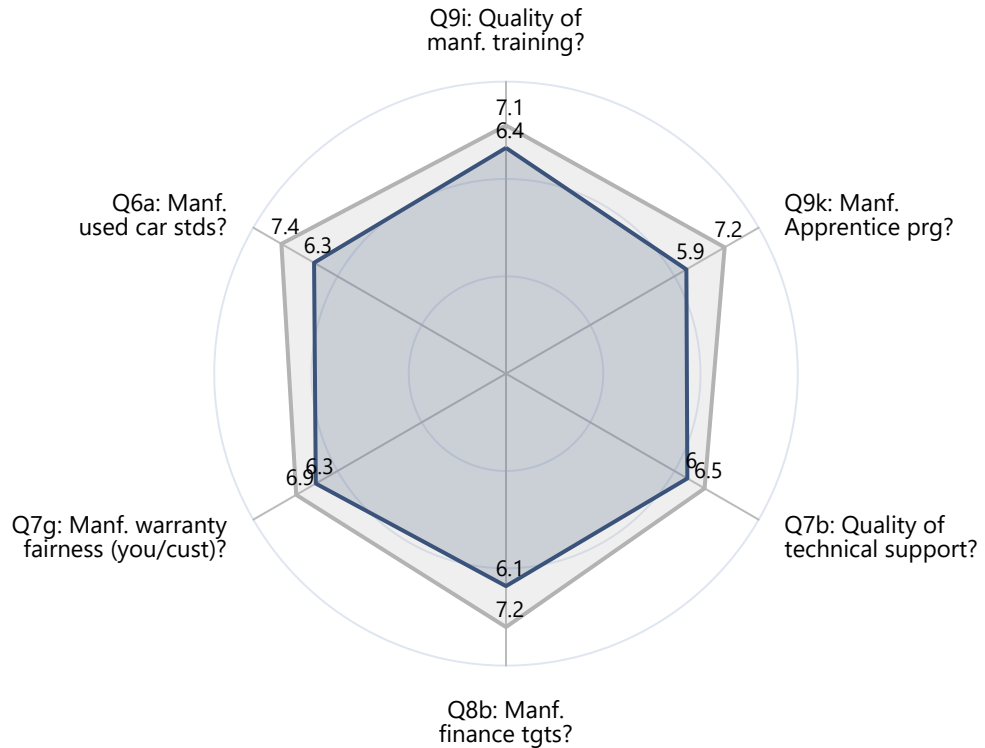
% Change
+12.8%

Score Change
+0.5 pts



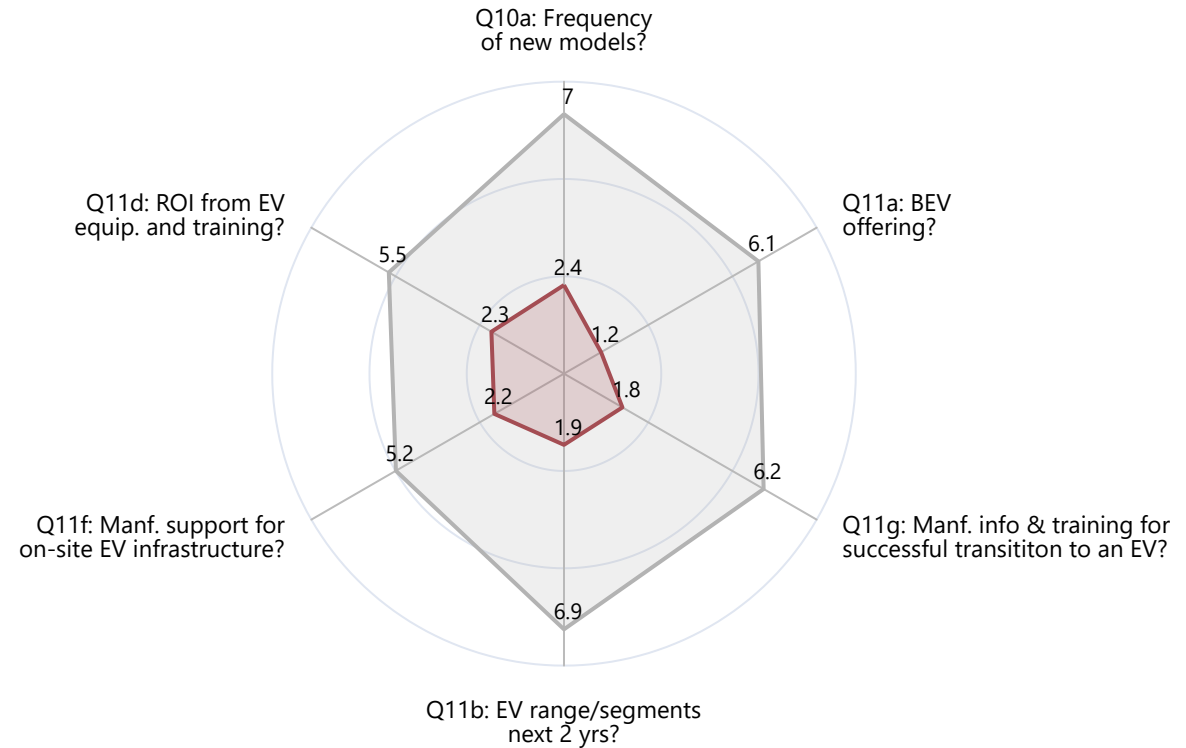
Top 6 Questions vs Average

Brand 2024 ● Average 2024 ●



Bottom 6 Questions vs Average

Brand 2024 ● Average 2024 ●



Question 4 - Value of the franchise	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	3.9	3.9	0.0	-2.2
Q4b: The future profit return from representing your franchise?	3.3	3.5	+0.2	-2.6
Q4c: The required level of capital investment?	4.8	5.0	+0.2	-1.3
Q4d: The cost required in your dealership to meet franchised standards?	4.5	4.9	+0.4	-1.4
Q4e: The return on capital for your dealership?	3.9	4.0	+0.1	-1.9
Q4f: The quality of guidance provided by your manufacturer to your dealership?	4.2	4.2	0.0	-2.1
Q4g: The financial support available to your dealership from your manufacturer?	3.7	4.4	+0.7	-1.4

Question 6 - Used car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	5.9	6.3	+0.4	-1.1
Q6b: The targets set by your manufacturer for used cars?	5.0	5.4	+0.4	-1.9
Q6c: The cost and quality of your manufacturer's used car warranties?	5.2	5.4	+0.2	-1.5
Q6d: Your total margin on used car sales?	5.5	5.6	+0.1	-1.3
Q6e: Your manufacturer's used car programme?	5.3	5.8	+0.5	-1.3
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	5.3	5.5	+0.2	-1.4

Question 5 - New car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	5.4	5.3	-0.1	-0.9
Q5b: Your new car targeting process?	5.5	5.7	+0.2	-0.3
Q5c: Your ability to meet your manufacturers new car targets in the current market conditions?		5.3	-	-0.6
Q5d: Your total margin on new vehicles?	5.1	5.0	-0.1	-1.1
Q5e: Your current bonus and rebate rates on new car sales?	4.8	4.7	-0.1	-1.4
Q5f: Manufacturer inducement to self register vehicles?	5.1	5.1	0.0	-1.1
Q5g: Manufacturer's new vehicle supply?	3.1	4.3	+1.2	-2.1
Q5h: The fairness of your manufacturer's new car ordering and stocking policies?	4.6	5.1	+0.5	-1.4
Q5i: The fairness of your manufacturer's demonstrator programme?	4.9	4.9	0.0	-1.5
Q5j: The affect the ZEV Mandate is having on obtaining new vehicles for customer orders?		3.9	-	-2.4

Question 7 - Aftersales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	5.7	5.6	-0.1	-1.2
Q7b: Quality of technical support?	4.8	6.0	+1.2	-0.6
Q7c: Availability of parts?	4.8	5.7	+0.9	-0.4
Q7d: Price of manufacturer parts compared with parts factors?	5.0	4.3	-0.7	-1.6
Q7e: Service profitability earnings?	5.7	5.5	-0.2	-1.2
Q7f: Manufacturer service plan rates and recovery?	5.6	5.6	0.0	-0.8
Q7g: The fairness of your manufacturer's warranty policy for you and your customers?	5.7	6.3	+0.6	-0.6
Q7h: Your manufacturer's stocking policy for parts/accessories?	5.1	5.5	+0.4	-1.5

Question 8 - Finance					Question 10 - Product and marketing				
	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.		Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	5.5	5.8	+0.3	-1.3	Q10a: Frequency of introduction of new models?	2.1	2.4	+0.3	-4.6
Q8b: The reasonableness of the finance targets set by your manufacturer?	5.6	6.1	+0.5	-1.2	Q10b: Product value and pricing?	4.6	4.1	-0.5	-2.6
Q8c: The earnings potential of your manufacturer's finance programme?	5.1	4.8	-0.3	-1.5	Q10c: Product advertising?	3.6	3.5	-0.1	-3.2
Q8d: The support you receive from your manufacturer's finance house?	5.0	5.5	+0.5	-1.4	Question 11 - Electric vehicle/Plug-in vehicles				
Question 9 - Dealer/Manufacturer relationships					Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	4.9	5.4	+0.5	-1.7	Q11a: Battery Electric Vehicle products your manufacturer currently offers?	1.6	1.2	-0.4	-4.9
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	4.7	5.0	+0.3	-1.7	Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	1.6	1.9	+0.3	-5.0
Q9c: Your manufacturer's dealer council/franchise board?	5.2	5.3	+0.1	-1.5	Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	2.0	2.6	+0.6	-4.1
Q9d: Your manufacturer's response to your communications with them?	4.7	4.7	0.0	-2.2	Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	1.8	2.3	+0.5	-3.2
Q9e: Your manufacturer dealer standards are fair and reasonable?	5.1	5.0	-0.1	-2.0	Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	2.2	2.5	+0.3	-3.0
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	4.8	5.0	+0.2	-1.5	Q11f: With your manufacturer's support with on-site EV charging infrastructure?	2.6	2.2	-0.4	-3.1
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	5.0	4.9	-0.1	-1.9	Q11g: That your manufacturer's Electric Vehicle charging information and training equips your customers to successfully transition to an EV?		1.8	-	-4.4
Q9h: The value of manufacturer field staff to your business?	5.1	4.8	-0.3	-2.0	Question 12 & 13 - Overall Rating				
Q9i: The quality of your manufacturer's training?	5.8	6.4	+0.6	-0.6	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9j: The cost of manufacturer's training?	4.9	4.1	-0.8	-2.2	Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	3.9	4.4	+0.5	-2.2
Q9k: Your manufacturer's apprenticeship programme?	5.7	5.9	+0.2	-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?	3.4	3.8	+0.4	-2.8
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	4.3	4.9	+0.6	-1.6					

Overall Manufacturer Rating

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

Summer 2023

6.0

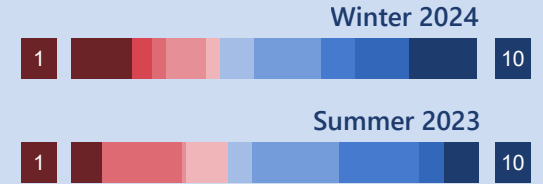
Winter 2024

6.1

Ranking vs. Summer 23
16 vs. 18

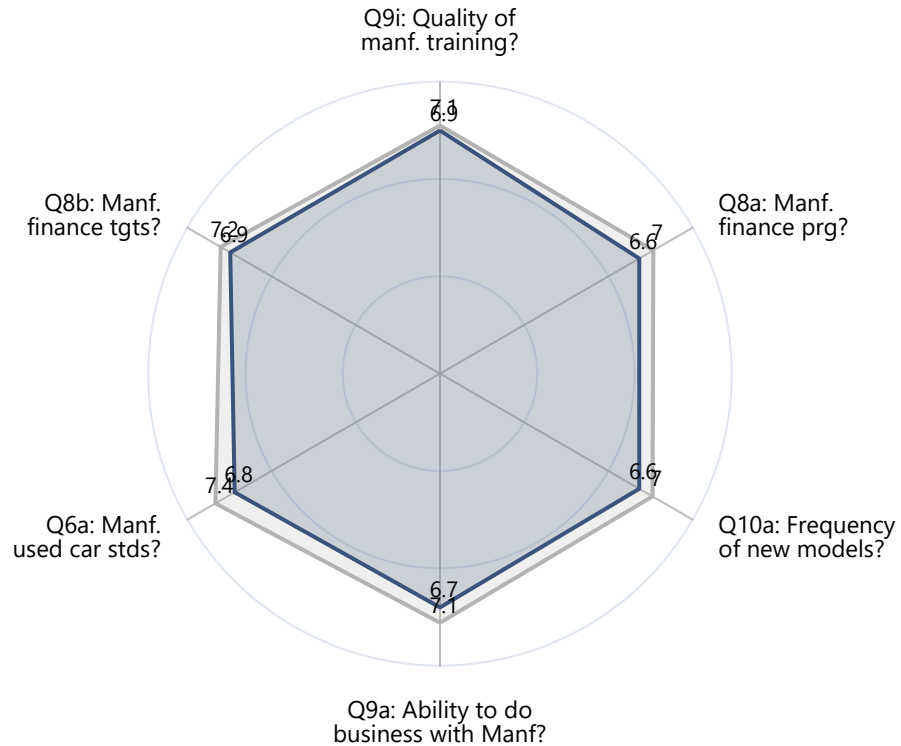
% Change
+1.7%

Score Change
+0.1 pts



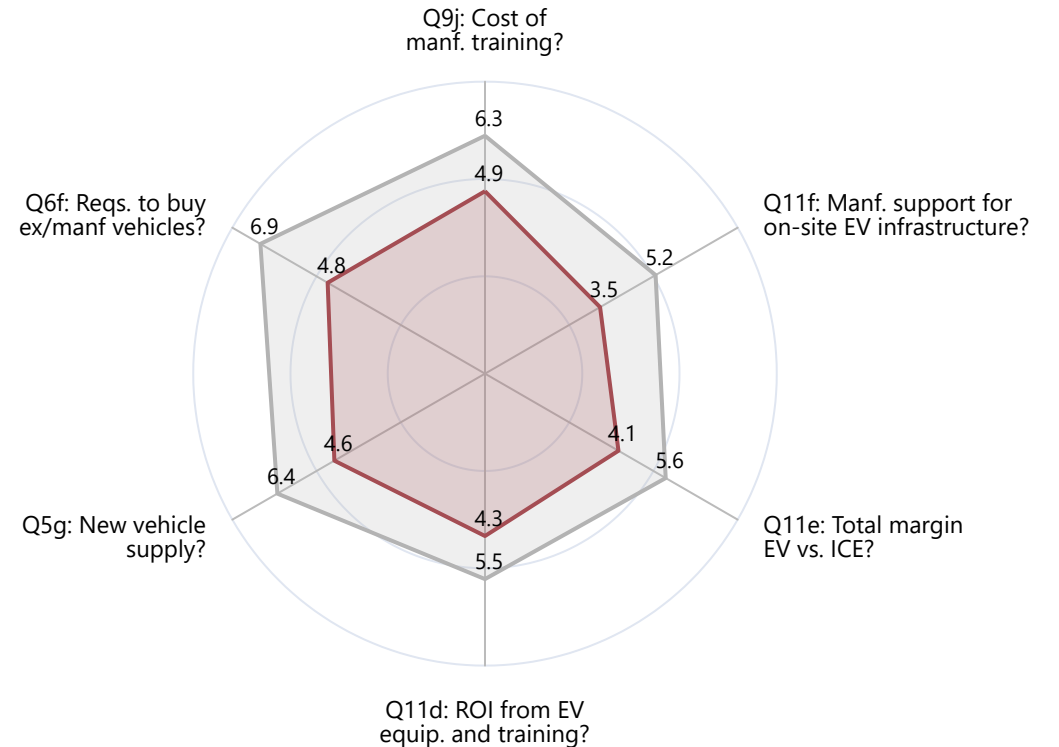
Top 6 Questions vs Average

Brand 2024 ● | Average 2024 ●



Bottom 6 Questions vs Average

Brand 2024 ● | Average 2024 ●



Question 4 - Value of the franchise	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	6.2	6.1	-0.1	+0.0
Q4b: The future profit return from representing your franchise?	5.0	5.6	+0.6	-0.5
Q4c: The required level of capital investment?	5.8	5.5	-0.3	-0.8
Q4d: The cost required in your dealership to meet franchised standards?	5.5	5.2	-0.3	-1.1
Q4e: The return on capital for your dealership?	5.6	5.7	+0.1	-0.2
Q4f: The quality of guidance provided by your manufacturer to your dealership?	5.7	5.8	+0.1	-0.6
Q4g: The financial support available to your dealership from your manufacturer?	5.1	5.3	+0.2	-0.6

Question 6 - Used car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	7.1	6.8	-0.3	-0.6
Q6b: The targets set by your manufacturer for used cars?	6.6	5.9	-0.7	-1.4
Q6c: The cost and quality of your manufacturer's used car warranties?	6.2	6.1	-0.1	-0.8
Q6d: Your total margin on used car sales?	6.5	5.8	-0.7	-1.1
Q6e: Your manufacturer's used car programme?	6.7	6.3	-0.4	-0.8
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	5.9	4.8	-1.1	-2.1

Question 5 - New car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	6.2	6.4	+0.2	+0.2
Q5b: Your new car targeting process?	6.3	6.4	+0.1	+0.4
Q5c: Your ability to meet your manufacturers new car targets in the current market conditions?		5.9	-	-0.0
Q5d: Your total margin on new vehicles?	5.4	6.0	+0.6	-0.1
Q5e: Your current bonus and rebate rates on new car sales?	5.5	6.0	+0.5	-0.2
Q5f: Manufacturer inducement to self register vehicles?	4.7	5.5	+0.8	-0.6
Q5g: Manufacturer's new vehicle supply?	3.8	4.6	+0.8	-1.8
Q5h: The fairness of your manufacturer's new car ordering and stocking policies?	4.9	5.6	+0.7	-1.0
Q5i: The fairness of your manufacturer's demonstrator programme?	5.3	5.0	-0.3	-1.4
Q5j: The affect the ZEV Mandate is having on obtaining new vehicles for customer orders?		5.8	-	-0.5

Question 7 - Aftersales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	5.5	6.3	+0.8	-0.5
Q7b: Quality of technical support?	5.5	5.7	+0.2	-0.8
Q7c: Availability of parts?	5.6	5.6	0.0	-0.5
Q7d: Price of manufacturer parts compared with parts factors?	5.3	5.5	+0.2	-0.4
Q7e: Service profitability earnings?	5.7	6.1	+0.4	-0.6
Q7f: Manufacturer service plan rates and recovery?	5.4	5.6	+0.2	-0.9
Q7g: The fairness of your manufacturer's warranty policy for you and your customers?	5.4	6.0	+0.6	-0.9
Q7h: Your manufacturer's stocking policy for parts/accessories?	6.3	6.5	+0.2	-0.5

Question 8 - Finance					Question 10 - Product and marketing				
	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.		Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	6.3	6.6	+0.3	-0.5	Q10a: Frequency of introduction of new models?	5.5	6.6	+1.1	-0.4
Q8b: The reasonableness of the finance targets set by your manufacturer?	6.8	6.9	+0.1	-0.3	Q10b: Product value and pricing?	6.0	6.3	+0.3	-0.3
Q8c: The earnings potential of your manufacturer's finance programme?	5.6	5.9	+0.3	-0.5	Q10c: Product advertising?	5.6	5.9	+0.3	-0.9
Q8d: The support you receive from your manufacturer's finance house?	5.8	6.0	+0.2	-0.9	Question 11 - Electric vehicle/Plug-in vehicles				
Question 9 - Dealer/Manufacturer relationships					Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	6.4	6.7	+0.3	-0.4	Q11a: Battery Electric Vehicle products your manufacturer currently offers?	4.8	5.4	+0.6	-0.7
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	5.9	6.2	+0.3	-0.5	Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	5.9	5.9	0.0	-1.0
Q9c: Your manufacturer's dealer council/franchise board?	6.7	6.4	-0.3	-0.5	Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	5.5	5.2	-0.3	-1.4
Q9d: Your manufacturer's response to your communications with them?	6.6	6.6	0.0	-0.3	Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	4.1	4.3	+0.2	-1.1
Q9e: Your manufacturer dealer standards are fair and reasonable?	6.1	6.0	-0.1	-1.0	Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	3.7	4.1	+0.4	-1.5
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	5.2	5.4	+0.2	-1.1	Q11f: With your manufacturer's support with on-site EV charging infrastructure?	4.1	3.5	-0.6	-1.7
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	5.9	5.7	-0.2	-1.1	Q11g: That your manufacturer's Electric Vehicle charging information and training equips your customers to successfully transition to an EV?		5.3	-	-0.9
Q9h: The value of manufacturer field staff to your business?	6.4	6.1	-0.3	-0.8	Question 12 & 13 - Overall Rating				
Q9i: The quality of your manufacturer's training?	6.6	6.9	+0.3	-0.1	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9j: The cost of manufacturer's training?	5.4	4.9	-0.5	-1.5	Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	6.0	6.1	+0.1	-0.5
Q9k: Your manufacturer's apprenticeship programme?	6.8	6.4	-0.4	-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?	6.1	5.9	-0.2	-0.7
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	4.5	5.2	+0.7	-1.3					

Overall Manufacturer Rating

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

Summer 2023

5.6

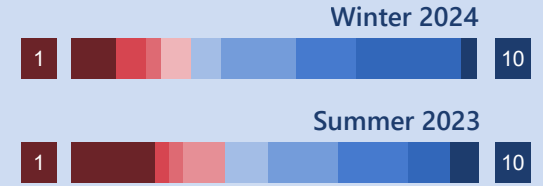
Winter 2024

6.4

Ranking vs. Summer 23
13 vs. 20

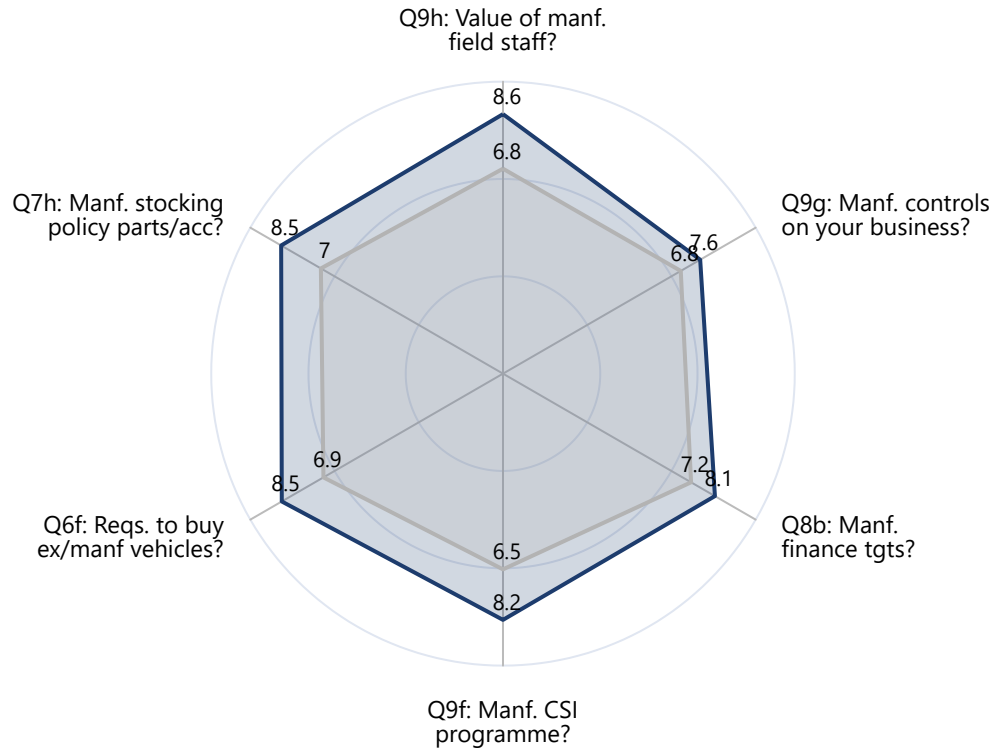
% Change
+14.3%

Score Change
+0.8 pts



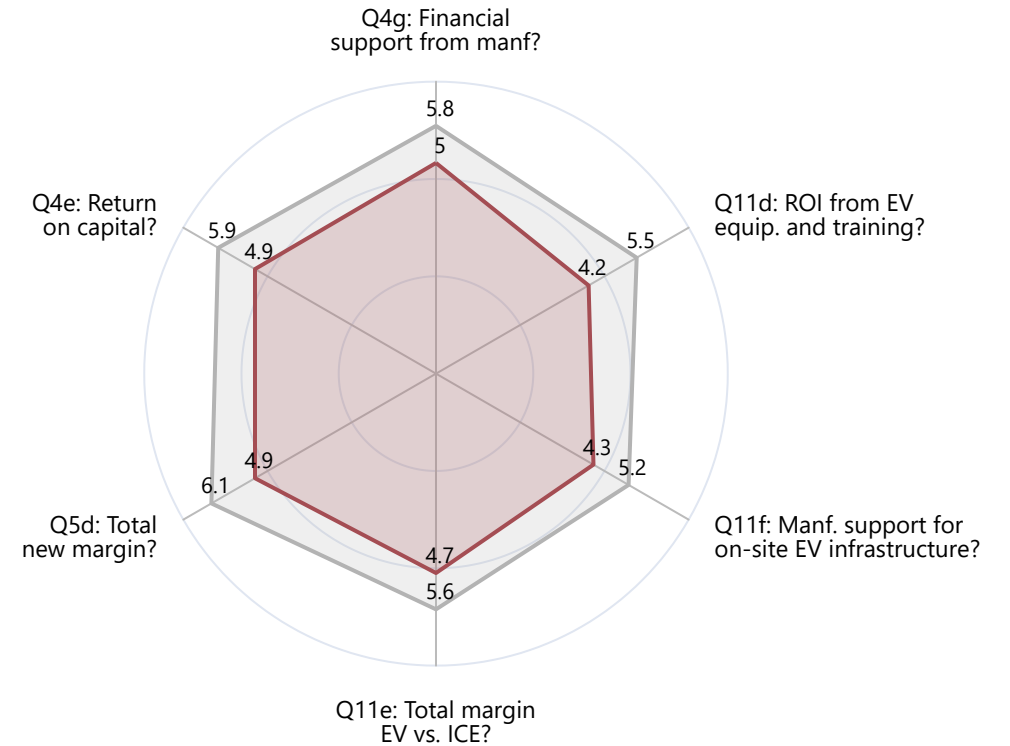
Top 6 Questions vs Average

Brand 2024 ● Average 2024 ●



Bottom 6 Questions vs Average

Brand 2024 ● Average 2024 ●



Question 4 - Value of the franchise	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	4.3	5.4	+1.1	-0.7
Q4b: The future profit return from representing your franchise?	4.4	5.5	+1.1	-0.6
Q4c: The required level of capital investment?	6.1	7.1	+1.0	+0.8
Q4d: The cost required in your dealership to meet franchised standards?	6.3	6.3	0.0	+0.0
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?	6.2	6.3	+0.1	-0.1
Q4g: The financial support available to your dealership from your manufacturer?	4.3	5.0	+0.7	-0.9

Question 6 - Used car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	7.2	7.5	+0.3	+0.1
Q6b: The targets set by your manufacturer for used cars?	6.0	7.0	+1.0	-0.3
Q6c: The cost and quality of your manufacturer's used car warranties?	6.2	6.9	+0.7	-0.0
Q6d: Your total margin on used car sales?	7.1	7.5	+0.4	+0.6
Q6e: Your manufacturer's used car programme?	6.1	7.2	+1.1	+0.2
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	6.8	8.5	+1.7	+1.6

Question 5 - New car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	5.9	6.7	+0.8	+0.5
Q5b: Your new car targeting process?	5.7	6.6	+0.9	+0.6
Q5c: Your ability to meet your manufacturers new car targets in the current market conditions?		6.3	-	+0.4
Q5d: Your total margin on new vehicles?	4.6	4.9	+0.3	-1.2
Q5e: Your current bonus and rebate rates on new car sales?	4.4	6.0	+1.6	-0.2
Q5f: Manufacturer inducement to self register vehicles?	5.8	6.0	+0.2	-0.1
Q5g: Manufacturer's new vehicle supply?	6.8	6.3	-0.5	-0.1
Q5h: The fairness of your manufacturer's new car ordering and stocking policies?	7.2	7.0	-0.2	+0.4
Q5i: The fairness of your manufacturer's demonstrator programme?	5.9	6.3	+0.4	-0.1
Q5j: The affect the ZEV Mandate is having on obtaining new vehicles for customer orders?		6.8	-	+0.4

Question 7 - Aftersales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	6.4	6.7	+0.3	+0.0
Q7b: Quality of technical support?	6.6	6.8	+0.2	+0.3
Q7c: Availability of parts?	6.9	6.4	-0.5	+0.3
Q7d: Price of manufacturer parts compared with parts factors?	5.6	5.4	-0.2	-0.5
Q7e: Service profitability earnings?	7.3	7.4	+0.1	+0.7
Q7f: Manufacturer service plan rates and recovery?	7.8	6.6	-1.2	+0.1
Q7g: The fairness of your manufacturer's warranty policy for you and your customers?	7.2	7.1	-0.1	+0.2
Q7h: Your manufacturer's stocking policy for parts/accessories?	7.2	8.5	+1.3	+1.5

Question 8 - Finance					Question 10 - Product and marketing				
	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.		Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	7.1	7.5	+0.4	+0.5	Q10a: Frequency of introduction of new models?	5.9	5.6	-0.3	-1.4
Q8b: The reasonableness of the finance targets set by your manufacturer?	7.3	8.1	+0.8	+0.9	Q10b: Product value and pricing?	5.9	5.9	0.0	-0.7
Q8c: The earnings potential of your manufacturer's finance programme?	5.7	5.8	+0.1	-0.5	Q10c: Product advertising?	5.0	5.6	+0.6	-1.1
Q8d: The support you receive from your manufacturer's finance house?	6.7	6.9	+0.2	-0.1	Question 11 - Electric vehicle/Plug-in vehicles				
Question 9 - Dealer/Manufacturer relationships					Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	6.9	7.3	+0.4	+0.2	Q11a: Battery Electric Vehicle products your manufacturer currently offers?	5.7	7.2	+1.5	+1.2
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	6.3	6.7	+0.4	+0.1	Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	5.4	6.1	+0.7	-0.8
Q9c: Your manufacturer's dealer council/franchise board?			-		Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	5.7	6.5	+0.8	-0.2
Q9d: Your manufacturer's response to your communications with them?	6.8	6.8	0.0	-0.1	Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	3.8	4.2	+0.4	-1.3
Q9e: Your manufacturer dealer standards are fair and reasonable?	7.2	7.5	+0.3	+0.6	Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	3.7	4.7	+1.0	-0.9
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	7.2	8.2	+1.0	+1.7	Q11f: With your manufacturer's support with on-site EV charging infrastructure?	2.8	4.3	+1.5	-1.0
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	7.5	7.6	+0.1	+0.7	Q11g: That your manufacturer's Electric Vehicle charging information and training equips your customers to successfully transition to an EV?		5.8	-	-0.4
Q9h: The value of manufacturer field staff to your business?	7.2	8.6	+1.4	+1.8	Question 12 & 13 - Overall Rating				
Q9i: The quality of your manufacturer's training?	6.7	7.2	+0.5	+0.1	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9j: The cost of manufacturer's training?	7.0	7.3	+0.3	+1.0	Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	5.6	6.4	+0.8	-0.2
Q9k: Your manufacturer's apprenticeship programme?	5.6	7.4	+1.8	+0.2	Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	5.1	5.9	+0.8	-0.7
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	7.4	7.0	-0.4	+0.5					

Overall Manufacturer Rating

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

Summer 2023

8.4

Winter 2024

8.0

Ranking vs. Summer 23
6 vs. 5

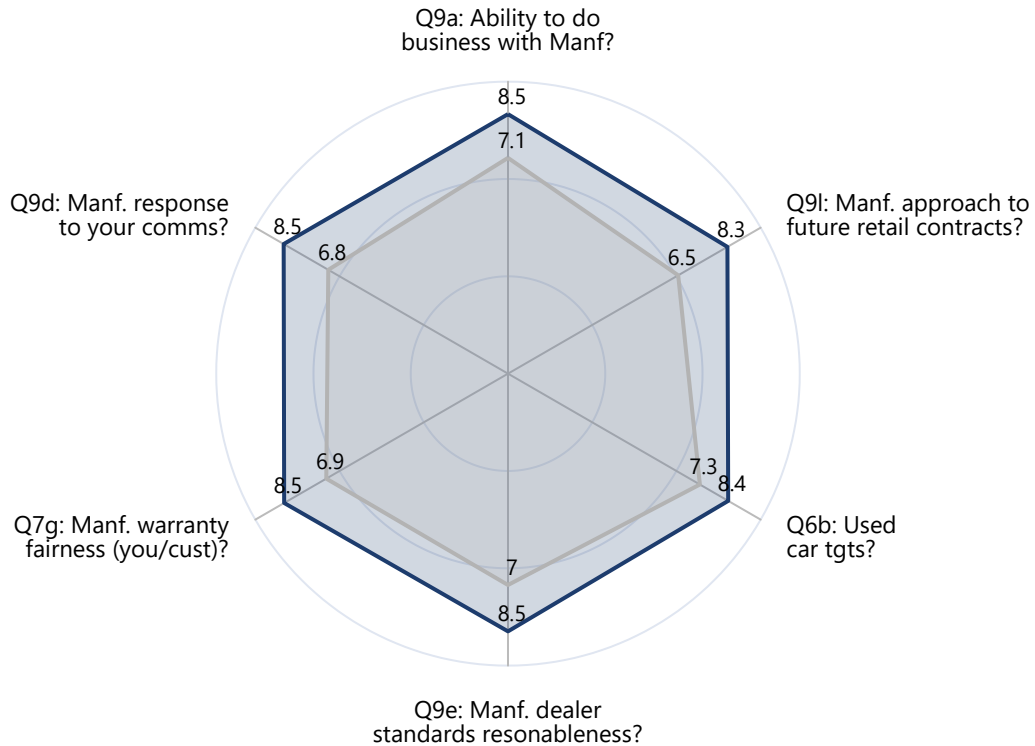
% Change
-4.8%

Score Change
-0.4 pts



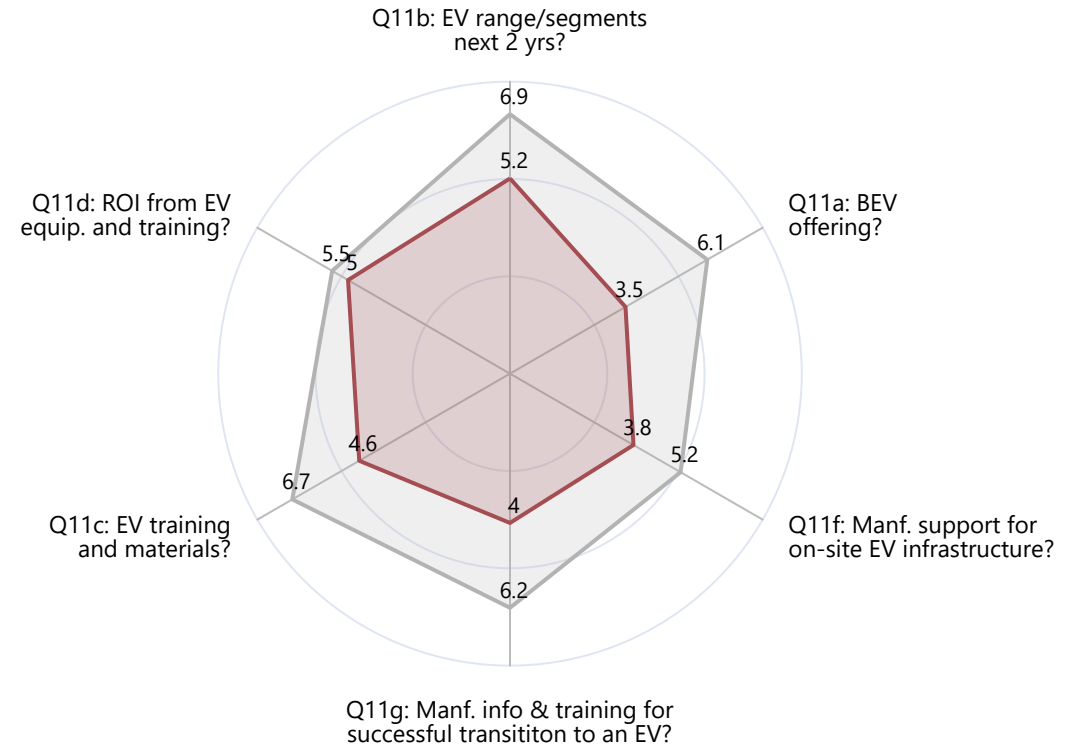
Top 6 Questions vs Average

Brand 2024 ● | Average 2024 ●



Bottom 6 Questions vs Average

Brand 2024 ● | Average 2024 ●



Question 4 - Value of the franchise	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	7.6	7.1	-0.5	+1.1
Q4b: The future profit return from representing your franchise?	7.7	7.2	-0.5	+1.1
Q4c: The required level of capital investment?	8.3	7.9	-0.4	+1.6
Q4d: The cost required in your dealership to meet franchised standards?	8.5	7.9	-0.6	+1.6
Q4e: The return on capital for your dealership?	7.8	7.3	-0.5	+1.3
Q4f: The quality of guidance provided by your manufacturer to your dealership?	8.3	8.1	-0.2	+1.7
Q4g: The financial support available to your dealership from your manufacturer?	7.8	7.5	-0.3	+1.6

Question 6 - Used car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	8.4	8.3	-0.1	+0.9
Q6b: The targets set by your manufacturer for used cars?	8.6	8.4	-0.2	+1.1
Q6c: The cost and quality of your manufacturer's used car warranties?	8.5	8.2	-0.3	+1.3
Q6d: Your total margin on used car sales?	8.4	8.3	-0.1	+1.4
Q6e: Your manufacturer's used car programme?	8.3	7.7	-0.6	+0.7
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	7.9	8.0	+0.1	+1.1

Question 5 - New car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	8.2	7.6	-0.6	+1.4
Q5b: Your new car targeting process?	7.9	7.3	-0.6	+1.3
Q5c: Your ability to meet your manufacturers new car targets in the current market conditions?		7.2	-	+1.4
Q5d: Your total margin on new vehicles?	7.3	7.1	-0.2	+1.0
Q5e: Your current bonus and rebate rates on new car sales?	7.3	7.1	-0.2	+0.9
Q5f: Manufacturer inducement to self register vehicles?	8.0	7.5	-0.5	+1.4
Q5g: Manufacturer's new vehicle supply?	6.5	7.4	+0.9	+1.0
Q5h: The fairness of your manufacturer's new car ordering and stocking policies?	7.8	7.7	-0.1	+1.1
Q5i: The fairness of your manufacturer's demonstrator programme?	8.1	7.7	-0.4	+1.3
Q5j: The affect the ZEV Mandate is having on obtaining new vehicles for customer orders?		7.5	-	+1.1

Question 7 - Aftersales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	8.2	7.6	-0.6	+0.9
Q7b: Quality of technical support?	8.2	8.1	-0.1	+1.6
Q7c: Availability of parts?	8.2	8.3	+0.1	+2.2
Q7d: Price of manufacturer parts compared with parts factors?	7.4	7.1	-0.3	+1.1
Q7e: Service profitability earnings?	7.8	7.5	-0.3	+0.8
Q7f: Manufacturer service plan rates and recovery?	7.5	7.4	-0.1	+0.9
Q7g: The fairness of your manufacturer's warranty policy for you and your customers?	8.8	8.5	-0.3	+1.6
Q7h: Your manufacturer's stocking policy for parts/accessories?	8.2	7.9	-0.3	+0.9

Question 8 - Finance

Score (S23) Score (W24) +/- (pts) vs. Avg.

Q8a: The competitiveness of your manufacturer's finance programme?	7.4	7.4	0.0	+0.4
Q8b: The reasonableness of the finance targets set by your manufacturer?	8.0	7.7	-0.3	+0.5
Q8c: The earnings potential of your manufacturer's finance programme?	6.0	6.4	+0.4	+0.1
Q8d: The support you receive from your manufacturer's finance house?	7.8	8.0	+0.2	+1.1

Question 9 - Dealer/Manufacturer relationships

Score (S23) Score (W24) +/- (pts) vs. Avg.

Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	8.7	8.5	-0.2	+1.4
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	8.6	8.3	-0.3	+1.6
Q9c: Your manufacturer's dealer council/franchise board?			-	
Q9d: Your manufacturer's response to your communications with them?	8.8	8.5	-0.3	+1.7
Q9e: Your manufacturer dealer standards are fair and reasonable?	8.9	8.5	-0.4	+1.5
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	8.4	7.8	-0.6	+1.3
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	8.8	8.3	-0.5	+1.4
Q9h: The value of manufacturer field staff to your business?	8.5	8.1	-0.4	+1.3
Q9i: The quality of your manufacturer's training?	8.4	8.2	-0.2	+1.1
Q9j: The cost of manufacturer's training?	8.4	8.0	-0.4	+1.7
Q9k: Your manufacturer's apprenticeship programme?	8.3	8.1	-0.2	+0.9
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	8.6	8.3	-0.3	+1.9

Question 10 - Product and marketing

Score (S23) Score (W24) +/- (pts) vs. Avg.

Q10a: Frequency of introduction of new models?	5.6	5.9	+0.3	-1.1
Q10b: Product value and pricing?	7.7	7.4	-0.3	+0.7
Q10c: Product advertising?	7.5	7.4	-0.1	+0.6

Question 11 - Electric vehicle/Plug-in vehicles

Score (S23) Score (W24) +/- (pts) vs. Avg.

Q11a: Battery Electric Vehicle products your manufacturer currently offers?	4.9	3.5	-1.4	-2.5
Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	6.4	5.2	-1.2	-1.7
Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	6.1	4.6	-1.5	-2.1
Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	6.0	5.0	-1.0	-0.5
Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	6.4	6.1	-0.3	+0.6
Q11f: With your manufacturer's support with on-site EV charging infrastructure?	4.8	3.8	-1.0	-1.4
Q11g: That your manufacturer's Electric Vehicle charging information and training equips your customers to successfully transition to an EV?		4.0	-	-2.3

Question 12 & 13 - Overall Rating

Score (S23) Score (W24) +/- (pts) vs. Avg.

Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	8.4	8.0	-0.4	+1.4
Q13: Thinking about the value of this franchise, how likely are you to recommend this brand on a scale of 1 to 10?	8.5	8.2	-0.3	+1.7

Overall Manufacturer Rating

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

Summer 2023

7.3

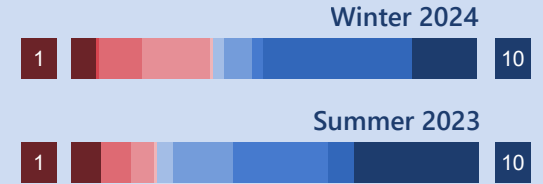
Winter 2024

6.9

Ranking vs. Summer 23
11 vs. 11

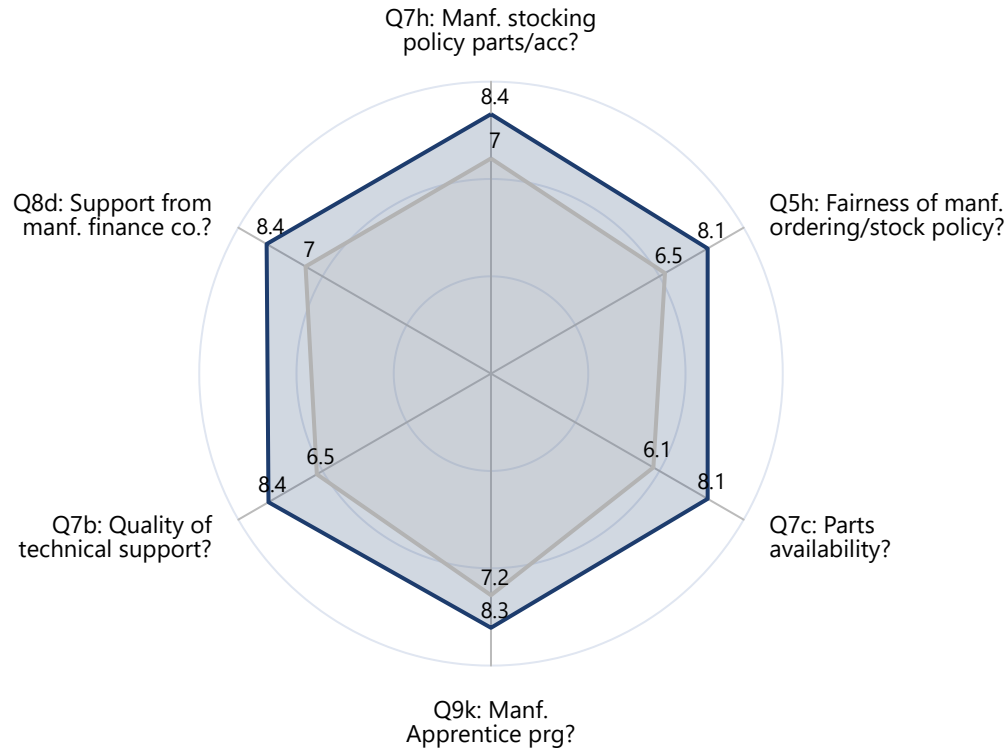
% Change
-5.5%

Score Change
-0.4 pts



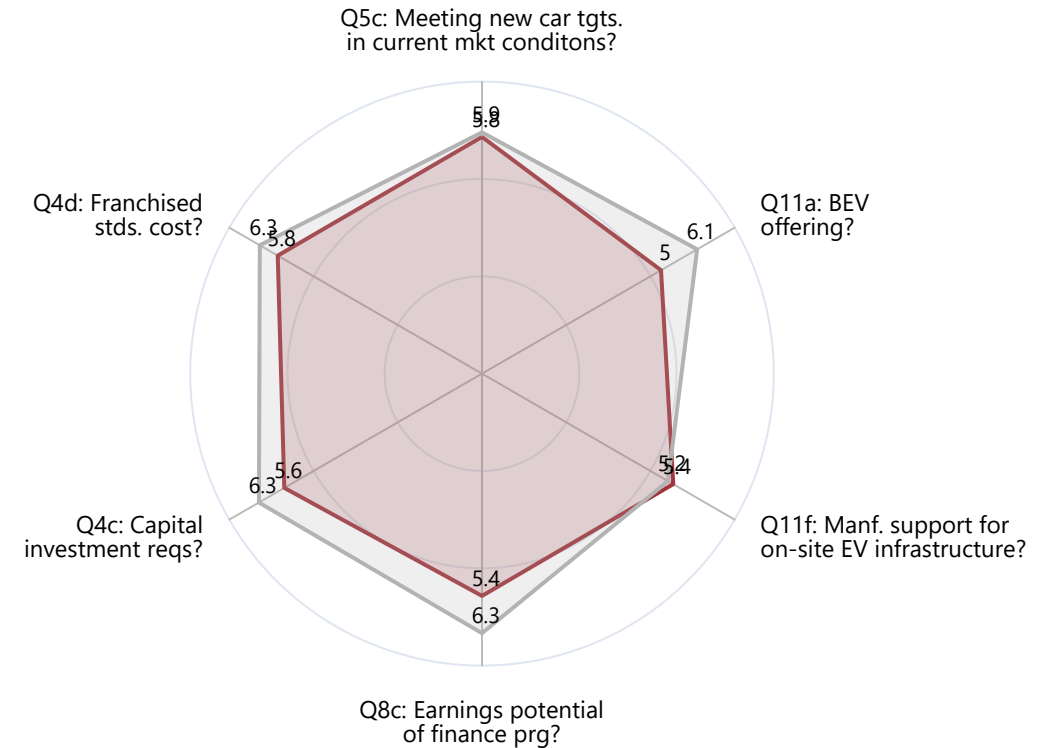
Top 6 Questions vs Average

Brand 2024 ● | Average 2024 ●



Bottom 6 Questions vs Average

Brand 2024 ● | Average 2024 ●



Question 4 - Value of the franchise	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	7.0	6.6	-0.4	+0.5
Q4b: The future profit return from representing your franchise?	6.9	6.9	0.0	+0.7
Q4c: The required level of capital investment?	6.1	5.6	-0.5	-0.7
Q4d: The cost required in your dealership to meet franchised standards?	6.4	5.8	-0.6	-0.5
Q4e: The return on capital for your dealership?	6.8	6.4	-0.4	+0.5
Q4f: The quality of guidance provided by your manufacturer to your dealership?	7.4	7.4	0.0	+1.0
Q4g: The financial support available to your dealership from your manufacturer?	7.4	6.6	-0.8	+0.7

Question 6 - Used car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	7.5	7.3	-0.2	-0.1
Q6b: The targets set by your manufacturer for used cars?	7.0	6.1	-0.9	-1.2
Q6c: The cost and quality of your manufacturer's used car warranties?	7.2	6.7	-0.5	-0.2
Q6d: Your total margin on used car sales?	7.7	7.1	-0.6	+0.2
Q6e: Your manufacturer's used car programme?	7.2	6.9	-0.3	-0.2
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	5.9	5.9	0.0	-1.0

Question 5 - New car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	6.9	6.7	-0.2	+0.4
Q5b: Your new car targeting process?	6.6	6.4	-0.2	+0.4
Q5c: Your ability to meet your manufacturers new car targets in the current market conditions?		5.8	-	-0.1
Q5d: Your total margin on new vehicles?	6.9	6.6	-0.3	+0.5
Q5e: Your current bonus and rebate rates on new car sales?	6.9	6.6	-0.3	+0.4
Q5f: Manufacturer inducement to self register vehicles?	7.4	6.2	-1.2	+0.1
Q5g: Manufacturer's new vehicle supply?	7.1	7.2	+0.1	+0.8
Q5h: The fairness of your manufacturer's new car ordering and stocking policies?	7.9	8.1	+0.2	+1.6
Q5i: The fairness of your manufacturer's demonstrator programme?	7.4	7.0	-0.4	+0.6
Q5j: The affect the ZEV Mandate is having on obtaining new vehicles for customer orders?		6.7	-	+0.4

Question 7 - Aftersales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	7.4	6.9	-0.5	+0.2
Q7b: Quality of technical support?	7.8	8.4	+0.6	+1.8
Q7c: Availability of parts?	7.9	8.1	+0.2	+2.0
Q7d: Price of manufacturer parts compared with parts factors?	7.3	7.3	0.0	+1.4
Q7e: Service profitability earnings?	7.0	7.5	+0.5	+0.8
Q7f: Manufacturer service plan rates and recovery?	7.4	7.0	-0.4	+0.5
Q7g: The fairness of your manufacturer's warranty policy for you and your customers?	8.2	8.1	-0.1	+1.1
Q7h: Your manufacturer's stocking policy for parts/accessories?	8.1	8.4	+0.3	+1.4

Question 8 - Finance

Score (S23) Score (W24) +/- (pts) vs. Avg.

Q8a: The competitiveness of your manufacturer's finance programme?	7.7	7.6	-0.1	+0.6
Q8b: The reasonableness of the finance targets set by your manufacturer?	7.7	7.6	-0.1	+0.4
Q8c: The earnings potential of your manufacturer's finance programme?	5.9	5.4	-0.5	-0.9
Q8d: The support you receive from your manufacturer's finance house?	7.9	8.4	+0.5	+1.5

Question 9 - Dealer/Manufacturer relationships

Score (S23) Score (W24) +/- (pts) vs. Avg.

Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	7.3	7.7	+0.4	+0.6
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	7.1	6.7	-0.4	+0.1
Q9c: Your manufacturer's dealer council/franchise board?	7.1	6.9	-0.2	+0.1
Q9d: Your manufacturer's response to your communications with them?	7.4	7.3	-0.1	+0.5
Q9e: Your manufacturer dealer standards are fair and reasonable?	7.2	6.5	-0.7	-0.4
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	7.6	7.1	-0.5	+0.6
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	6.8	7.1	+0.3	+0.3
Q9h: The value of manufacturer field staff to your business?	7.2	7.7	+0.5	+0.8
Q9i: The quality of your manufacturer's training?	7.7	7.8	+0.1	+0.7
Q9j: The cost of manufacturer's training?	7.1	7.0	-0.1	+0.6
Q9k: Your manufacturer's apprenticeship programme?	7.6	8.3	+0.7	+1.1
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	7.4	7.8	+0.4	+1.4

Question 10 - Product and marketing

Score (S23) Score (W24) +/- (pts) vs. Avg.

Q10a: Frequency of introduction of new models?	7.4	7.4	0.0	+0.3
Q10b: Product value and pricing?	7.4	7.1	-0.3	+0.5
Q10c: Product advertising?	7.3	7.2	-0.1	+0.5

Question 11 - Electric vehicle/Plug-in vehicles

Score (S23) Score (W24) +/- (pts) vs. Avg.

Q11a: Battery Electric Vehicle products your manufacturer currently offers?	5.3	5.0	-0.3	-1.0
Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	6.2	6.3	+0.1	-0.6
Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	7.0	7.7	+0.7	+1.0
Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	6.1	6.0	-0.1	+0.6
Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	6.5	6.2	-0.3	+0.7
Q11f: With your manufacturer's support with on-site EV charging infrastructure?	6.1	5.4	-0.7	+0.1
Q11g: That your manufacturer's Electric Vehicle charging information and training equips your customers to successfully transition to an EV?		6.8	-	+0.6

Question 12 & 13 - Overall Rating

Score (S23) Score (W24) +/- (pts) vs. Avg.

Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	7.3	6.9	-0.4	+0.2
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	7.1	-0.6	+0.5

Overall Manufacturer Rating

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

Summer 2023

2.4

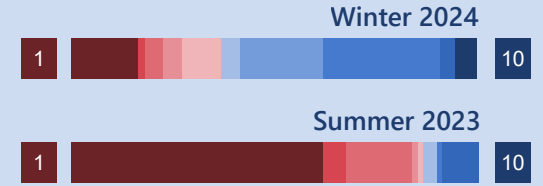
Winter 2024

5.9

Ranking vs. Summer 23
21 vs. 30

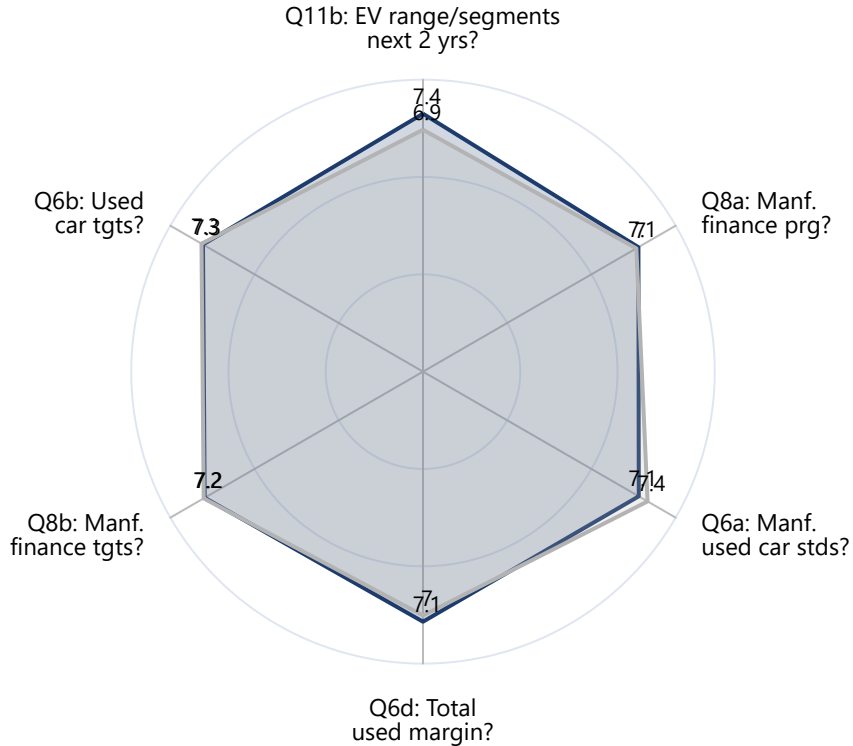
% Change
+145.8%

Score Change
+3.5 pts



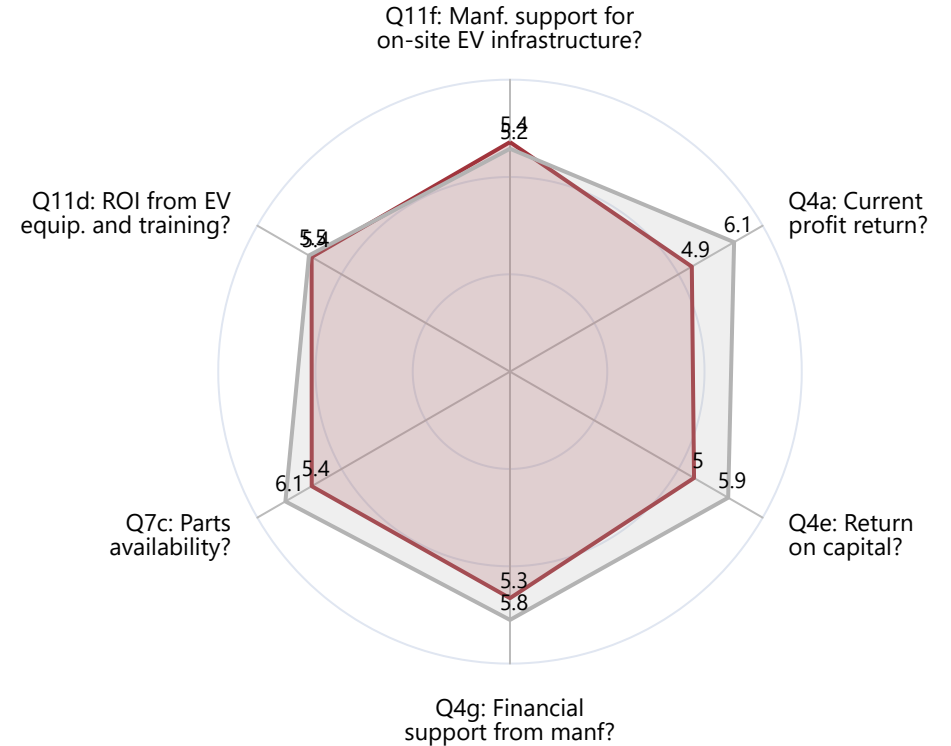
Top 6 Questions vs Average

Brand 2024 ● Average 2024 ●



Bottom 6 Questions vs Average

Brand 2024 ● Average 2024 ●



Question 4 - Value of the franchise	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	2.4	4.9	+2.5	-1.1
Q4b: The future profit return from representing your franchise?	2.6	6.2	+3.6	+0.1
Q4c: The required level of capital investment?	4.0	6.0	+2.0	-0.3
Q4d: The cost required in your dealership to meet franchised standards?	4.1	6.0	+1.9	-0.3
Q4e: The return on capital for your dealership?	2.5	5.0	+2.5	-0.9
Q4f: The quality of guidance provided by your manufacturer to your dealership?	2.5	5.7	+3.2	-0.7
Q4g: The financial support available to your dealership from your manufacturer?	2.4	5.3	+2.9	-0.5

Question 6 - Used car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	4.7	7.1	+2.4	-0.3
Q6b: The targets set by your manufacturer for used cars?	4.1	7.3	+3.2	-0.0
Q6c: The cost and quality of your manufacturer's used car warranties?	4.2	6.3	+2.1	-0.6
Q6d: Your total margin on used car sales?	5.6	7.1	+1.5	+0.2
Q6e: Your manufacturer's used car programme?	4.1	6.2	+2.1	-0.8
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	4.6	6.7	+2.1	-0.2

Question 5 - New car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	4.7	6.2	+1.5	-0.0
Q5b: Your new car targeting process?	3.4	5.9	+2.5	-0.2
Q5c: Your ability to meet your manufacturers new car targets in the current market conditions?		5.8	-	-0.0
Q5d: Your total margin on new vehicles?	4.4	6.5	+2.1	+0.4
Q5e: Your current bonus and rebate rates on new car sales?	3.7	6.6	+2.9	+0.4
Q5f: Manufacturer inducement to self register vehicles?	3.7	5.9	+2.2	-0.2
Q5g: Manufacturer's new vehicle supply?	4.3	6.5	+2.2	+0.1
Q5h: The fairness of your manufacturer's new car ordering and stocking policies?	3.5	6.1	+2.6	-0.4
Q5i: The fairness of your manufacturer's demonstrator programme?	4.1	5.9	+1.8	-0.4
Q5j: The affect the ZEV Mandate is having on obtaining new vehicles for customer orders?		5.7	-	-0.6

Question 7 - Aftersales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	3.8	7.0	+3.2	+0.3
Q7b: Quality of technical support?	3.3	5.5	+2.2	-1.0
Q7c: Availability of parts?	3.5	5.4	+1.9	-0.7
Q7d: Price of manufacturer parts compared with parts factors?	4.2	5.7	+1.5	-0.2
Q7e: Service profitability earnings?	5.1	6.9	+1.8	+0.2
Q7f: Manufacturer service plan rates and recovery?	5.6	6.5	+0.9	+0.0
Q7g: The fairness of your manufacturer's warranty policy for you and your customers?	4.2	7.1	+2.9	+0.1
Q7h: Your manufacturer's stocking policy for parts/accessories?	4.4	7.0	+2.6	+0.0

Question 8 - Finance					Question 10 - Product and marketing				
	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.		Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	4.1	7.1	+3.0	+0.1	Q10a: Frequency of introduction of new models?	5.0	6.8	+1.8	-0.2
Q8b: The reasonableness of the finance targets set by your manufacturer?	4.8	7.2	+2.4	-0.0	Q10b: Product value and pricing?	3.6	6.1	+2.5	-0.5
Q8c: The earnings potential of your manufacturer's finance programme?	4.7	6.8	+2.1	+0.5	Q10c: Product advertising?	4.2	6.6	+2.4	-0.2
Q8d: The support you receive from your manufacturer's finance house?	5.1	6.8	+1.7	-0.2	Question 11 - Electric vehicle/Plug-in vehicles				
Question 9 - Dealer/Manufacturer relationships					Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	2.8	6.5	+3.7	-0.6	Q11a: Battery Electric Vehicle products your manufacturer currently offers?	5.4	6.8	+1.4	+0.7
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	2.6	6.4	+3.8	-0.2	Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	5.7	7.4	+1.7	+0.5
Q9c: Your manufacturer's dealer council/franchise board?	5.2	6.7	+1.5	-0.2	Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	4.7	6.6	+1.9	-0.1
Q9d: Your manufacturer's response to your communications with them?	3.2	6.1	+2.9	-0.8	Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	3.2	5.4	+2.2	-0.1
Q9e: Your manufacturer dealer standards are fair and reasonable?	3.0	6.6	+3.6	-0.3	Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	3.0	5.9	+2.9	+0.3
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	2.4	6.0	+3.6	-0.5	Q11f: With your manufacturer's support with on-site EV charging infrastructure?	2.4	5.4	+3.0	+0.2
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	2.7	6.4	+3.7	-0.5	Q11g: That your manufacturer's Electric Vehicle charging information and training equips your customers to successfully transition to an EV?		6.3	-	+0.0
Q9h: The value of manufacturer field staff to your business?	3.1	6.4	+3.3	-0.5	Question 12 & 13 - Overall Rating				
Q9i: The quality of your manufacturer's training?	4.3	6.6	+2.3	-0.5	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9j: The cost of manufacturer's training?	4.1	6.3	+2.2	-0.0	Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	2.4	5.9	+3.5	-0.7
Q9k: Your manufacturer's apprenticeship programme?	5.7	6.5	+0.8	-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?	2.3	5.8	+3.5	-0.8
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	2.6	6.2	+3.6	-0.3					

Overall Manufacturer Rating

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

Summer 2023

5.4

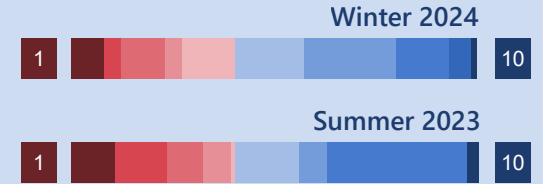
Winter 2024

5.6

Ranking vs. Summer 23
22 vs. 21

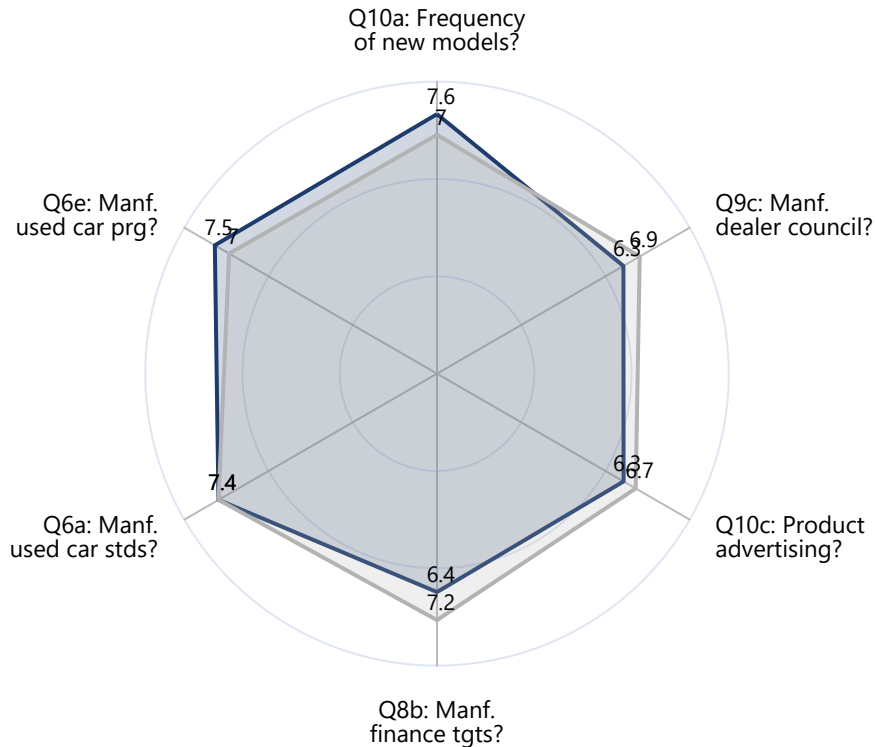
% Change
+3.7%

Score Change
+0.2 pts



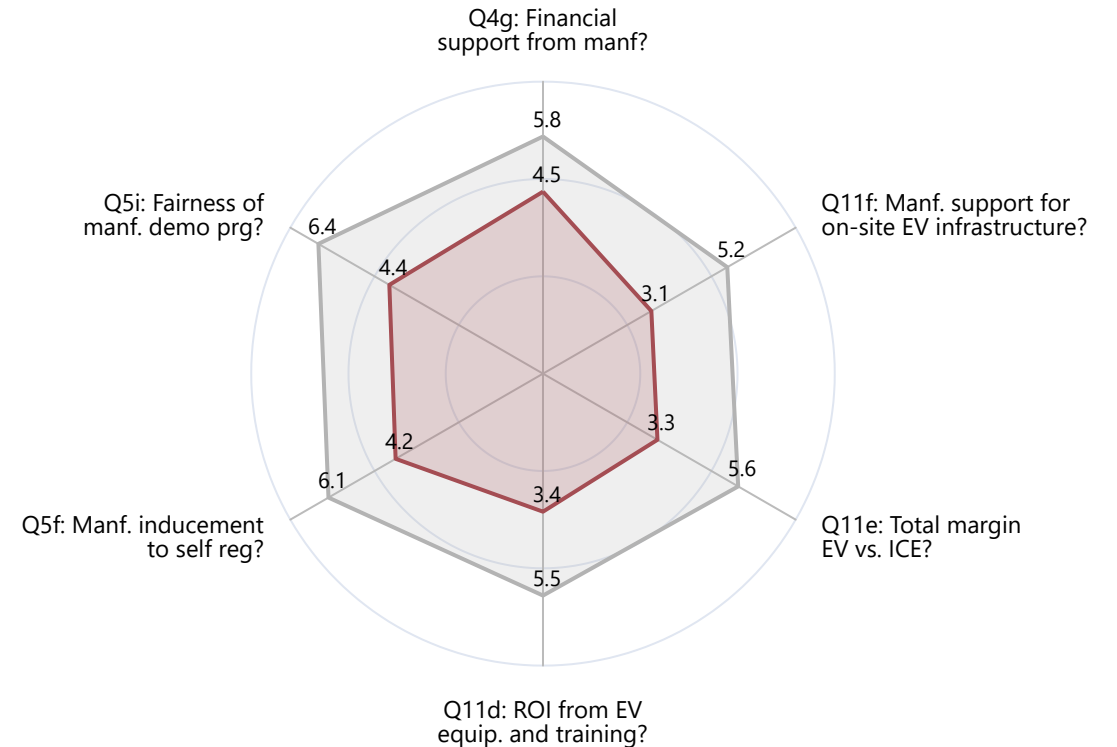
Top 6 Questions vs Average

Brand 2024 ● | Average 2024 ●



Bottom 6 Questions vs Average

Brand 2024 ● | Average 2024 ●



Question 4 - Value of the franchise	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	6.6	6.0	-0.6	-0.1
Q4b: The future profit return from representing your franchise?	5.4	4.9	-0.5	-1.2
Q4c: The required level of capital investment?	5.6	5.8	+0.2	-0.4
Q4d: The cost required in your dealership to meet franchised standards?	5.7	5.6	-0.1	-0.7
Q4e: The return on capital for your dealership?	6.0	5.4	-0.6	-0.5
Q4f: The quality of guidance provided by your manufacturer to your dealership?	5.1	4.9	-0.2	-1.5
Q4g: The financial support available to your dealership from your manufacturer?	4.9	4.5	-0.4	-1.4

Question 6 - Used car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	7.3	7.4	+0.1	+0.0
Q6b: The targets set by your manufacturer for used cars?	6.3	6.3	0.0	-1.0
Q6c: The cost and quality of your manufacturer's used car warranties?	6.6	6.2	-0.4	-0.7
Q6d: Your total margin on used car sales?	7.3	5.9	-1.4	-1.1
Q6e: Your manufacturer's used car programme?	7.6	7.5	-0.1	+0.5
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	6.7	5.1	-1.6	-1.8

Question 5 - New car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	5.4	5.5	+0.1	-0.7
Q5b: Your new car targeting process?	4.8	4.7	-0.1	-1.4
Q5c: Your ability to meet your manufacturers new car targets in the current market conditions?		5.0	-	-0.9
Q5d: Your total margin on new vehicles?	6.0	5.0	-1.0	-1.1
Q5e: Your current bonus and rebate rates on new car sales?	6.2	5.0	-1.2	-1.2
Q5f: Manufacturer inducement to self register vehicles?	4.9	4.2	-0.7	-1.9
Q5g: Manufacturer's new vehicle supply?	4.4	5.0	+0.6	-1.4
Q5h: The fairness of your manufacturer's new car ordering and stocking policies?	5.7	6.0	+0.3	-0.5
Q5i: The fairness of your manufacturer's demonstrator programme?	5.8	4.4	-1.4	-2.0
Q5j: The affect the ZEV Mandate is having on obtaining new vehicles for customer orders?		5.2	-	-1.2

Question 7 - Aftersales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	5.9	5.8	-0.1	-1.0
Q7b: Quality of technical support?	5.5	5.2	-0.3	-1.3
Q7c: Availability of parts?	4.9	4.7	-0.2	-1.5
Q7d: Price of manufacturer parts compared with parts factors?	5.2	4.7	-0.5	-1.2
Q7e: Service profitability earnings?	5.9	5.6	-0.3	-1.1
Q7f: Manufacturer service plan rates and recovery?	5.2	5.0	-0.2	-1.5
Q7g: The fairness of your manufacturer's warranty policy for you and your customers?	5.8	5.5	-0.3	-1.5
Q7h: Your manufacturer's stocking policy for parts/accessories?	6.4	6.1	-0.3	-0.9

Question 8 - Finance

Score (S23) Score (W24) +/- (pts) vs. Avg.

Q8a: The competitiveness of your manufacturer's finance programme?	6.2	6.3	+0.1	-0.7
Q8b: The reasonableness of the finance targets set by your manufacturer?	6.0	6.4	+0.4	-0.8
Q8c: The earnings potential of your manufacturer's finance programme?	5.9	6.1	+0.2	-0.3
Q8d: The support you receive from your manufacturer's finance house?	5.7	5.5	-0.2	-1.5

Question 9 - Dealer/Manufacturer relationships

Score (S23) Score (W24) +/- (pts) vs. Avg.

Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	5.3	5.5	+0.2	-1.6
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	4.7	4.5	-0.2	-2.2
Q9c: Your manufacturer's dealer council/franchise board?	5.9	6.3	+0.4	-0.6
Q9d: Your manufacturer's response to your communications with them?	5.0	5.3	+0.3	-1.5
Q9e: Your manufacturer dealer standards are fair and reasonable?	5.6	5.4	-0.2	-1.6
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	5.0	4.5	-0.5	-2.0
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	5.4	4.9	-0.5	-1.9
Q9h: The value of manufacturer field staff to your business?	5.2	5.7	+0.5	-1.1
Q9i: The quality of your manufacturer's training?	6.8	6.1	-0.7	-1.0
Q9j: The cost of manufacturer's training?	5.9	4.6	-1.3	-1.7
Q9k: Your manufacturer's apprenticeship programme?	6.8	6.3	-0.5	-0.9
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	5.1	4.9	-0.2	-1.6

Question 10 - Product and marketing

Score (S23) Score (W24) +/- (pts) vs. Avg.

Q10a: Frequency of introduction of new models?	6.7	7.6	+0.9	+0.6
Q10b: Product value and pricing?	5.7	6.1	+0.4	-0.5
Q10c: Product advertising?	6.3	6.3	0.0	-0.4

Question 11 - Electric vehicle/Plug-in vehicles

Score (S23) Score (W24) +/- (pts) vs. Avg.

Q11a: Battery Electric Vehicle products your manufacturer currently offers?	5.4	4.7	-0.7	-1.4
Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	6.0	5.7	-0.3	-1.2
Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	5.7	5.1	-0.6	-1.6
Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	4.8	3.4	-1.4	-2.1
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	-2.3
Q11f: With your manufacturer's support with on-site EV charging infrastructure?	3.9	3.1	-0.8	-2.2
Q11g: That your manufacturer's Electric Vehicle charging information and training equips your customers to successfully transition to an EV?		5.1	-	-1.1

Question 12 & 13 - Overall Rating

Score (S23) Score (W24) +/- (pts) vs. Avg.

Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	5.4	5.6	+0.2	-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?	6.0	5.4	-0.6	-1.2

Overall Manufacturer Rating

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

Summer 2023

6.8

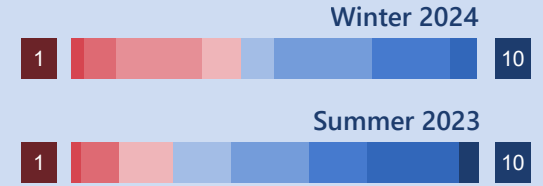
Winter 2024

5.9

Ranking vs. Summer 23
20 vs. 14

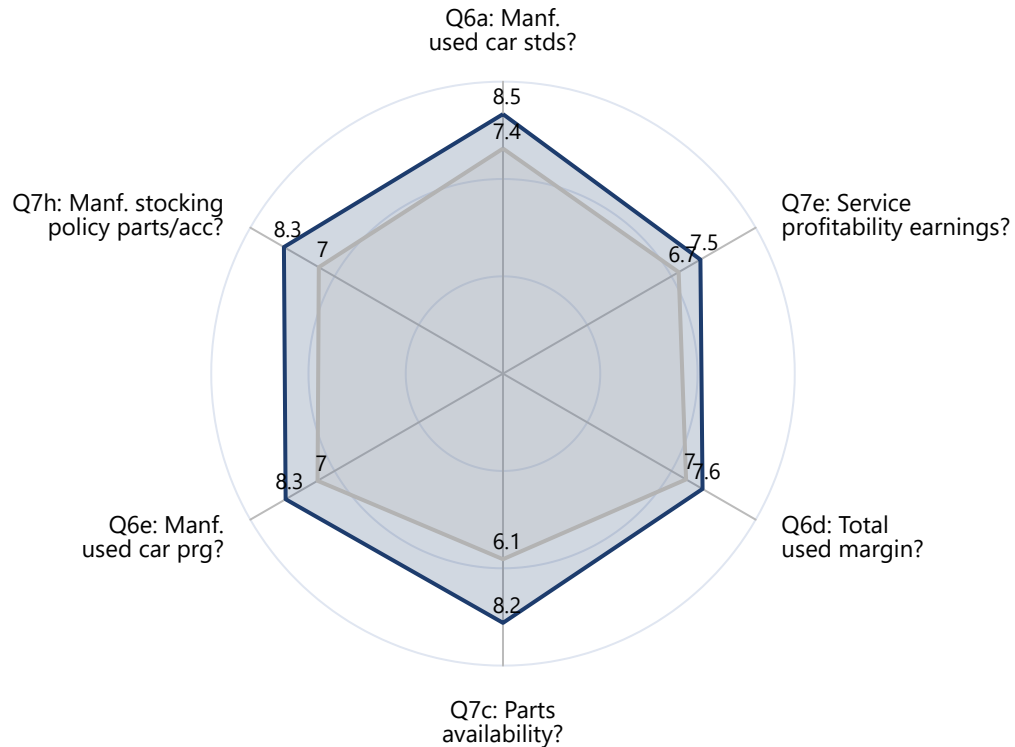
% Change
-13.2%

Score Change
-0.9 pts



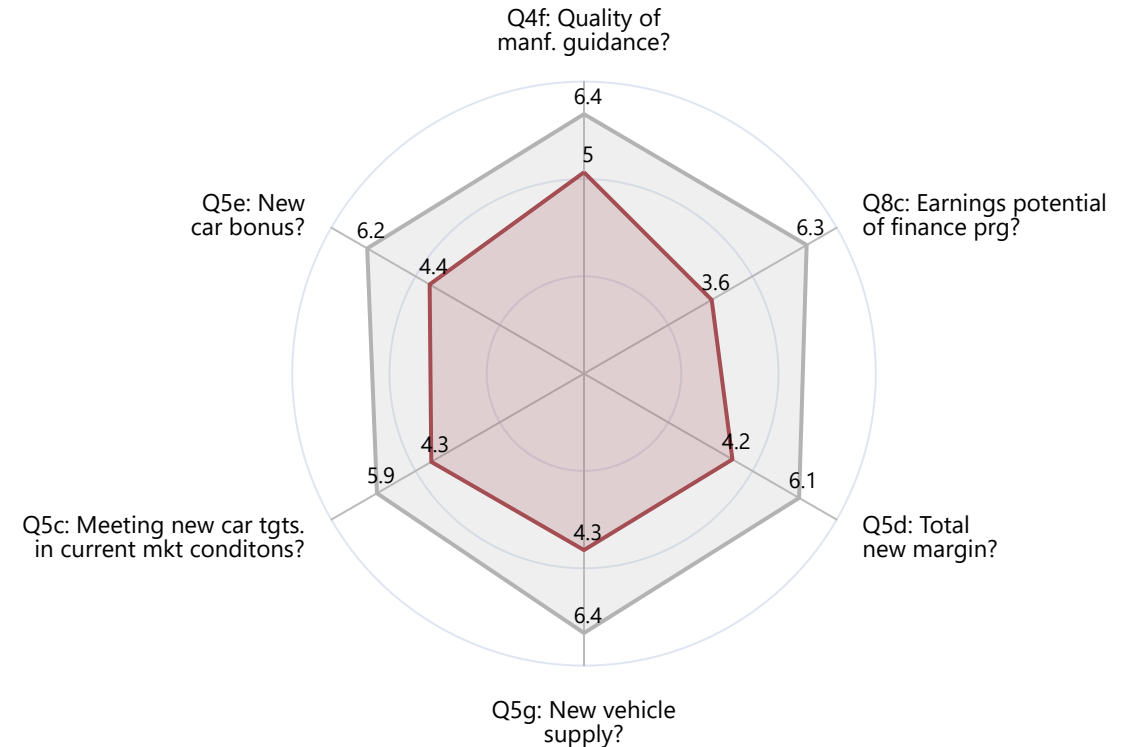
Top 6 Questions vs Average

Brand 2024 ● Average 2024 ●



Bottom 6 Questions vs Average

Brand 2024 ● Average 2024 ●



Question 4 - Value of the franchise	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q4a: The current profit return from representing your franchise?	6.8	5.5	-1.3	-0.5
Q4b: The future profit return from representing your franchise?	5.3	5.3	0.0	-0.8
Q4c: The required level of capital investment?	5.4	5.2	-0.2	-1.1
Q4d: The cost required in your dealership to meet franchised standards?	5.9	5.3	-0.6	-0.9
Q4e: The return on capital for your dealership?	6.0	5.4	-0.6	-0.6
Q4f: The quality of guidance provided by your manufacturer to your dealership?	5.6	5.0	-0.6	-1.4
Q4g: The financial support available to your dealership from your manufacturer?	5.9	5.5	-0.4	-0.3

Question 6 - Used car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q6a: Your manufacturer's used car standards?	8.1	8.5	+0.4	+1.1
Q6b: The targets set by your manufacturer for used cars?	7.3	7.0	-0.3	-0.3
Q6c: The cost and quality of your manufacturer's used car warranties?	7.4	7.0	-0.4	+0.1
Q6d: Your total margin on used car sales?	7.4	7.6	+0.2	+0.6
Q6e: Your manufacturer's used car programme?	7.7	8.3	+0.6	+1.2
Q6f: Your manufacturer's requirements to buy ex-manufacturer vehicles?	7.2	7.4	+0.2	+0.5

Question 5 - New car sales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q5a: The volume target aspirations of your manufacturer are realistic?	6.9	5.3	-1.6	-0.9
Q5b: Your new car targeting process?	7.1	5.0	-2.1	-1.0
Q5c: Your ability to meet your manufacturers new car targets in the current market conditions?		4.3	-	-1.5
Q5d: Your total margin on new vehicles?	5.6	4.2	-1.4	-1.9
Q5e: Your current bonus and rebate rates on new car sales?	5.3	4.4	-0.9	-1.8
Q5f: Manufacturer inducement to self register vehicles?	8.1	5.5	-2.6	-0.6
Q5g: Manufacturer's new vehicle supply?	5.8	4.3	-1.5	-2.0
Q5h: The fairness of your manufacturer's new car ordering and stocking policies?	6.9	6.6	-0.3	+0.1
Q5i: The fairness of your manufacturer's demonstrator programme?	7.1	5.1	-2.0	-1.3
Q5j: The affect the ZEV Mandate is having on obtaining new vehicles for customer orders?		6.7	-	+0.3

Question 7 - Aftersales	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q7a: Your manufacturer's target setting for aftersales?	6.9	6.7	-0.2	+0.0
Q7b: Quality of technical support?	7.4	7.4	0.0	+0.9
Q7c: Availability of parts?	7.8	8.2	+0.4	+2.1
Q7d: Price of manufacturer parts compared with parts factors?	6.8	6.3	-0.5	+0.4
Q7e: Service profitability earnings?	8.0	7.5	-0.5	+0.8
Q7f: Manufacturer service plan rates and recovery?	6.9	6.8	-0.1	+0.4
Q7g: The fairness of your manufacturer's warranty policy for you and your customers?	7.6	7.5	-0.1	+0.6
Q7h: Your manufacturer's stocking policy for parts/accessories?	8.1	8.3	+0.2	+1.3

Question 8 - Finance					Question 10 - Product and marketing				
	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.		Score (S23)	Score (W24)	+/- (pts)	vs. Avg.
Q8a: The competitiveness of your manufacturer's finance programme?	6.0	5.2	-0.8	-1.9	Q10a: Frequency of introduction of new models?	6.3	5.7	-0.6	-1.3
Q8b: The reasonableness of the finance targets set by your manufacturer?	6.9	7.0	+0.1	-0.3	Q10b: Product value and pricing?	6.9	6.7	-0.2	+0.0
Q8c: The earnings potential of your manufacturer's finance programme?	4.1	3.6	-0.5	-2.7	Q10c: Product advertising?	6.2	6.1	-0.1	-0.7
Q8d: The support you receive from your manufacturer's finance house?	6.2	5.8	-0.4	-1.1	Question 11 - Electric vehicle/Plug-in vehicles				
Question 9 - Dealer/Manufacturer relationships					Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9a: Your ability to do business with your manufacturer on a day-to-day basis?	7.1	6.0	-1.1	-1.2	Q11a: Battery Electric Vehicle products your manufacturer currently offers?	6.6	6.7	+0.1	+0.6
Q9b: The management of your manufacturer actually takes dealers views and opinions into account?	6.5	6.2	-0.3	-0.4	Q11b: With your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?	7.6	7.0	-0.6	+0.1
Q9c: Your manufacturer's dealer council/franchise board?	6.3	6.3	0.0	-0.6	Q11c: That your manufacturer enables you to effectively sell EVs and Plug-in Hybrid vehicle models (through training and materials)?	7.1	6.9	-0.2	+0.2
Q9d: Your manufacturer's response to your communications with them?	7.0	5.2	-1.8	-1.7	Q11d: With the return on investment in equipment and training for EV and plug-in vehicles?	6.1	5.2	-0.9	-0.3
Q9e: Your manufacturer dealer standards are fair and reasonable?	7.4	7.2	-0.2	+0.2	Q11e: With your total margin on new EV and Hybrid sales compared with conventional petrol and diesel new car sales?	6.3	5.2	-1.1	-0.3
Q9f: The performance, incentives and penalty regime that underpins your manufacturer's CSI programme?	7.3	7.3	0.0	+0.7	Q11f: With your manufacturer's support with on-site EV charging infrastructure?	6.2	5.8	-0.4	+0.5
Q9g: Your manufacturer's procedures and controls on your business are fair and reasonable?	7.1	6.6	-0.5	-0.2	Q11g: That your manufacturer's Electric Vehicle charging information and training equips your customers to successfully transition to an EV?		5.8	-	-0.4
Q9h: The value of manufacturer field staff to your business?	5.5	5.1	-0.4	-1.7	Question 12 & 13 - Overall Rating				
Q9i: The quality of your manufacturer's training?	6.9	6.3	-0.6	-0.8	Score (S23)	Score (W24)	+/- (pts)	vs. Avg.	
Q9j: The cost of manufacturer's training?	6.6	5.6	-1.0	-0.7	Q12: How would you rate your manufacturer overall on a scale of 1 to 10?	6.8	5.9	-0.9	-0.7
Q9k: Your manufacturer's apprenticeship programme?	7.6	7.5	-0.1	+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?	6.8	5.8	-1.0	-0.8
Q9l: Your manufacturer's approach to future retailing agreements and contracts?	5.9	5.3	-0.6	-1.1					

National Franchised Dealers Association Dealer Attitude Survey Winter 2024 Edition



201 Great Portland Street
London
W1W 5AB
nfda@rmif.co.uk



NFDA



RMI_NFDA



NFDA



nfda_uk



metryx

2nd Floor
Chestnut House
Rugby
Warwickshire
CV21 2AG
hello@metryx.co.uk