



National Motorcycle Dealers Association

Dealer Attitude Survey

Spring 2023

Dealer Attitude Survey Spring 2023

We are pleased to reveal the findings of the latest Motorcycle Dealer Attitude Survey conducted in May 2023 by the National Motorcycle Dealers Association (NMDA), which represents the interests of the UK's franchised motorcycle dealer sector through business support to its members and parliamentary lobbying on behalf of the industry.

This survey is carried out twice a year and examines how dealers view the major issues currently affecting them, whilst also evaluating how these views are changing over time. It also offers motorcycle dealers and their respective manufacturers a clear idea of the balance of opinion held on a range of views within their networks.

Dealers were asked to respond to questions covering significant aspects of their business relationship with their motorcycle manufacturer. From these responses, the majority of results have been produced on a simple five-point scale, ranging from 1 - very dissatisfied/very poor to 5 - very satisfied/very good.

**BMW
MOTORRAD****PIAGGIO****Kawasaki****ROYAL
ENFIELD**

NB:

National Motorcycle Dealers Association

Symon Cook - Head of Association

Tel: 07436 404102

Email: symon.cook@rmif.co.uk

Dealer Attitude Survey Spring 2023

6.3

is the overall satisfaction for the Spring 2023 survey - this is **lower than the Autumn 2022 survey** which scored 7.5 out of 10

-16%

is the overall satisfaction decrease compared to the previous survey. But year on year it is **up 5% vs Spring 2022**

Triumph

scored the highest with 9.5 and **also** improved the most with a 4.9% increase from the last survey

Ducati

decreased the most by -51.2% and **Piaggio Group** scored the least with a value of 2.9

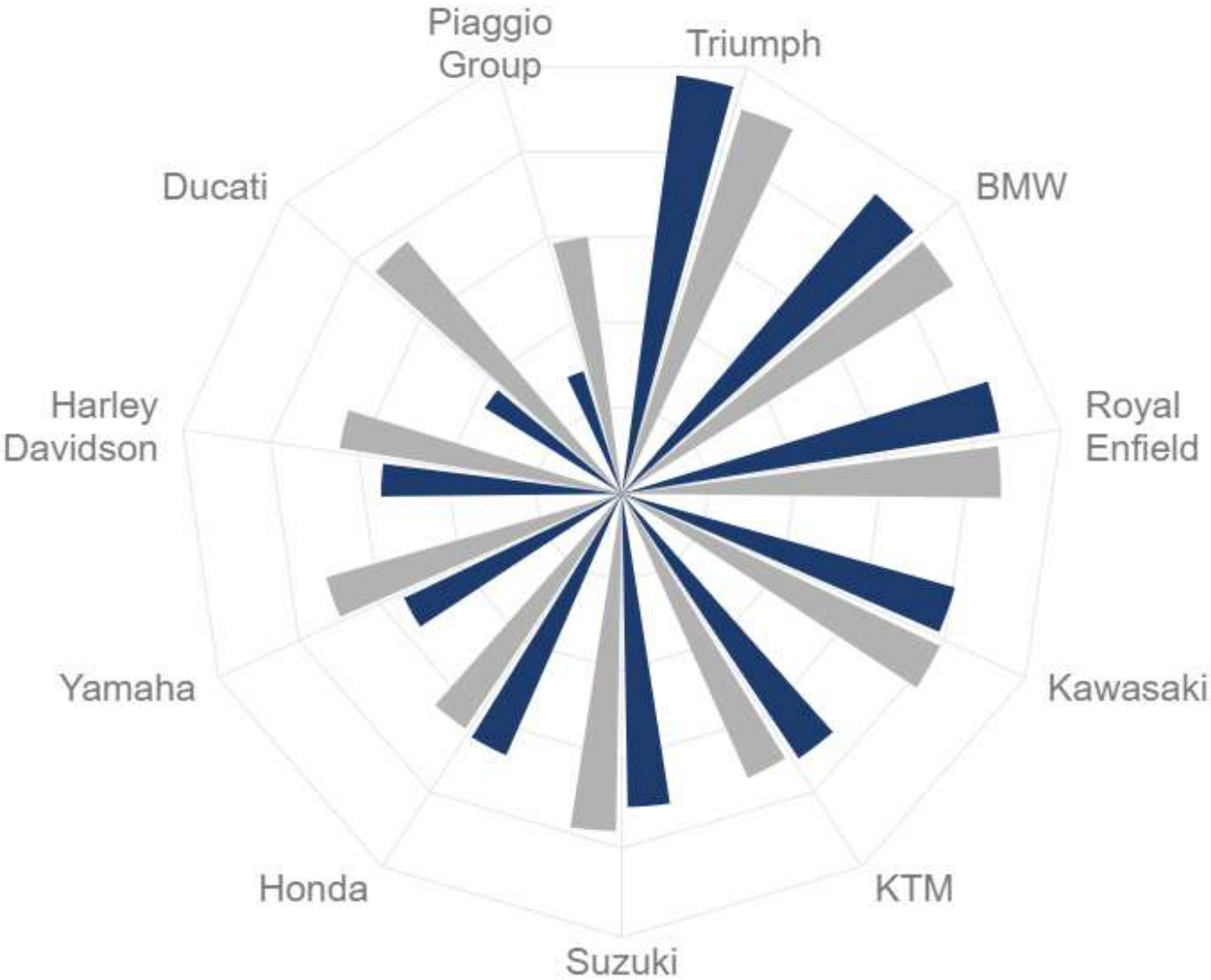
29%

is the **overall response rate** which is a 3 point decrease compared with the previous edition

-15%

is the overall decrease in satisfaction with the **profit return** by representing the franchise

Overall Satisfaction by Manufacturer



Spring 2023 Autumn 2022

5 Highest Scoring Questions

- The brand image
- Timely and fair settlement of warranty claims
- How satisfied are you with your manufacturer's warranty policy
- The support provided by your manufacturer to follow a professional sales process
- Frequency of new models



Positive

Dealers scored high satisfaction levels with **brand image** and **new model frequency**

Manufacturer support regarding **warranty policy and process** also ranked highly in addition to **sales process** development

5 Lowest Scoring Questions

- How realistic are your manufacturer's standards compared with the return on investment
- How satisfied are you with the profit return by representing your franchise
- The effectiveness of your dealer council and dealer forums
- The electric products your manufacturer currently offers
- Your Manufacturer's proposed EV/Plug-in product range over the next two years



Negative

Dealers appear most concerned about the **electric vehicle strategy** scoring both current and future product range the lowest in the survey at **2.3 out of 5**

Overall profitability continues to be a key concern for dealers with **ROI on standards achievement** scoring particularly low

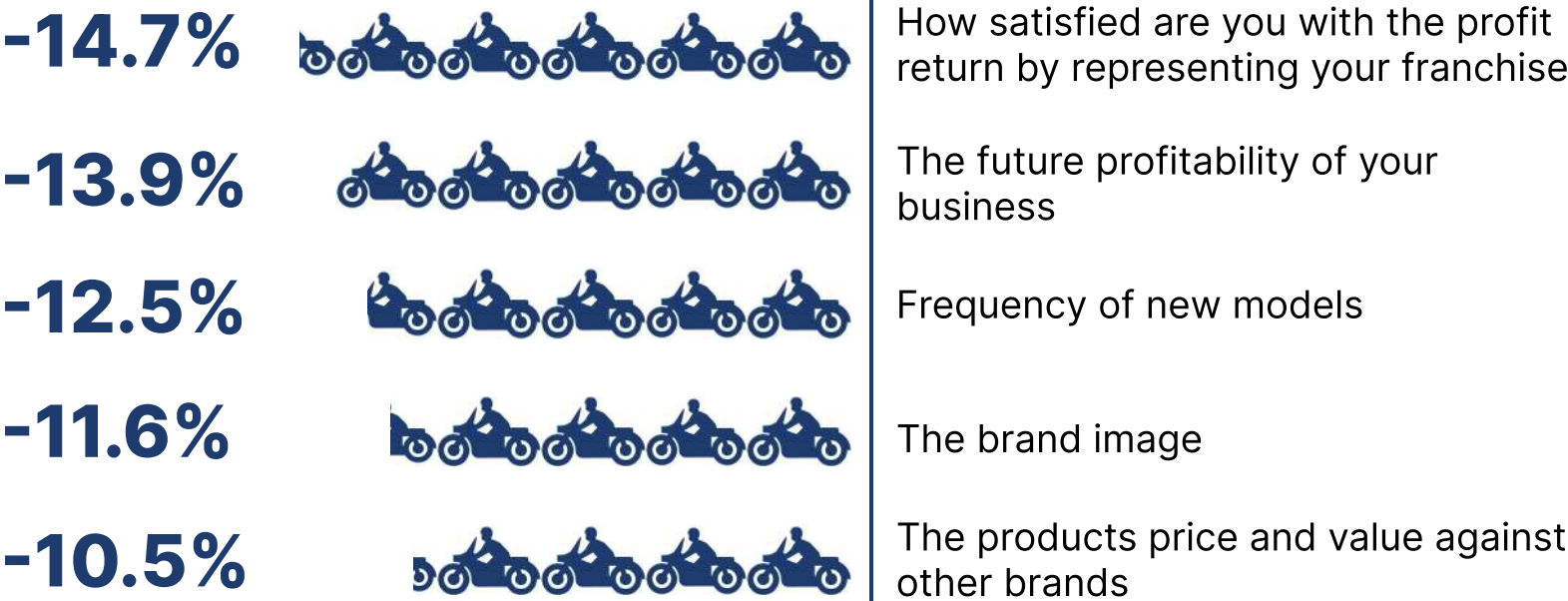
Largest changes vs Autumn 2022

An overall downward trend

The 2023 Spring Survey saw **declines in average scores across every question** versus the Autumn survey, reflecting a general decline in sentiment across the franchised network.

Profitability sees large declines with both **current profit return and future profitability** showing lower satisfaction since the last survey.

5 Biggest Answer Changes vs Autumn 2022



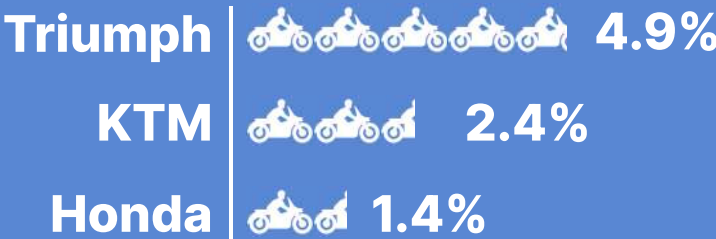
Winners and Losers by manufacturer

| 2023 Overall Satisfaction | % Change vs Autumn 2022 |
|---------------------------|-------------------------|
|---------------------------|-------------------------|

| | |
|-----|------|
| 6.3 | -16% |
|-----|------|

Previous year dealers rated the value of holding their motorcycle franchise at 7.5 out of 10

Manufacturers who **increased** overall satisfaction



Manufacturers where **satisfaction decreased** the most



The Path to Electrification

The **'Path to electrification'** is of clear concern to the Franchised Network in this spring's survey against a backdrop of potential legislation to phase out traditional powertrains.

Dealers appear to lack confidence in both their current EV line-up and their manufacturer's 2 year plan with over **half of the EV questions being scored 'Poor' or 'Very Poor'**

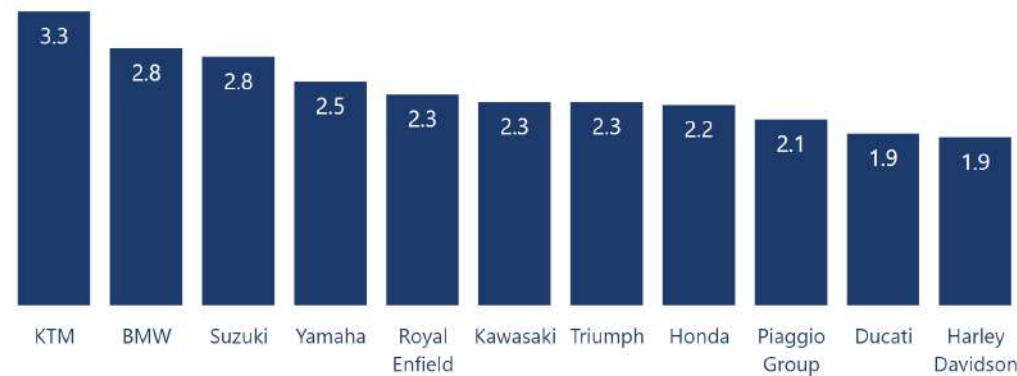
Comments submitted alongside ratings suggest the top concerns are:

Their manufacturer had poor quality products or a poor product choice for the price they are being sold at

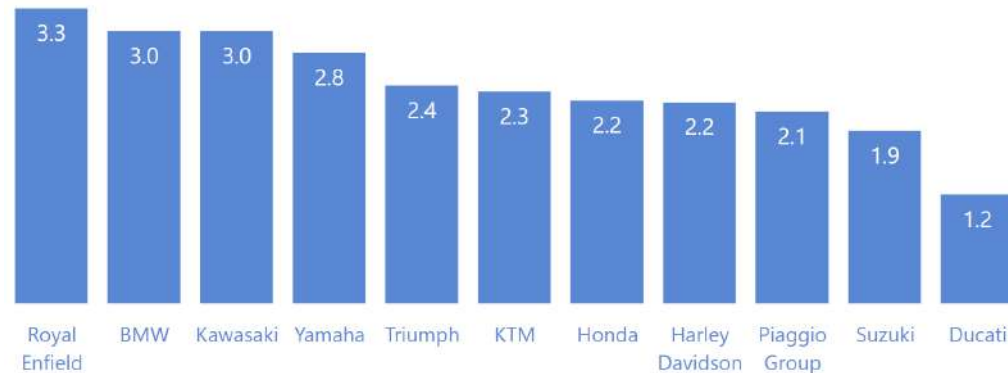
Manufacturers either have no electric products or are not chasing the EV Market

There is no EV plan that Dealers are aware of and the dealers are in the dark if there is one

The Electric products your manufacturer currently offers?



Your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?



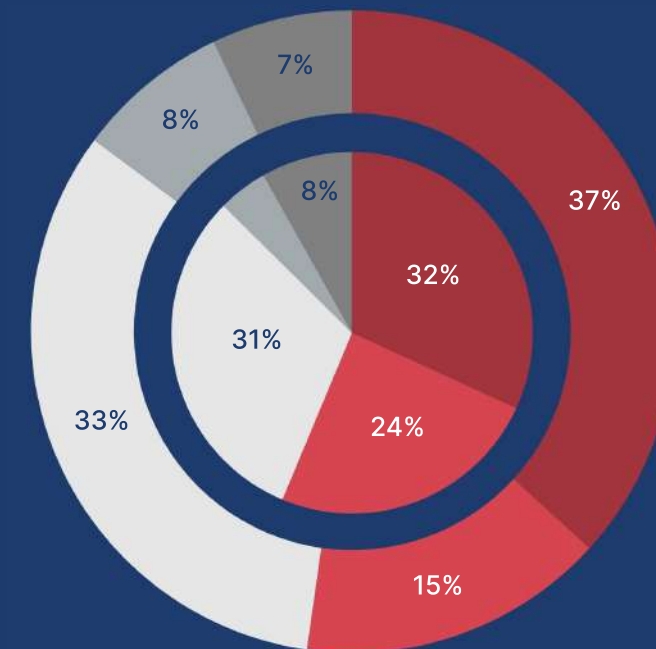
EV Question Response Breakdown

55%

Of answers were either 'Poor' (2) or 'Very Poor' (1)

85%

Of answers were either Neutral (3) or worse



1 2 3 4 5

(1= Low, 5= High)

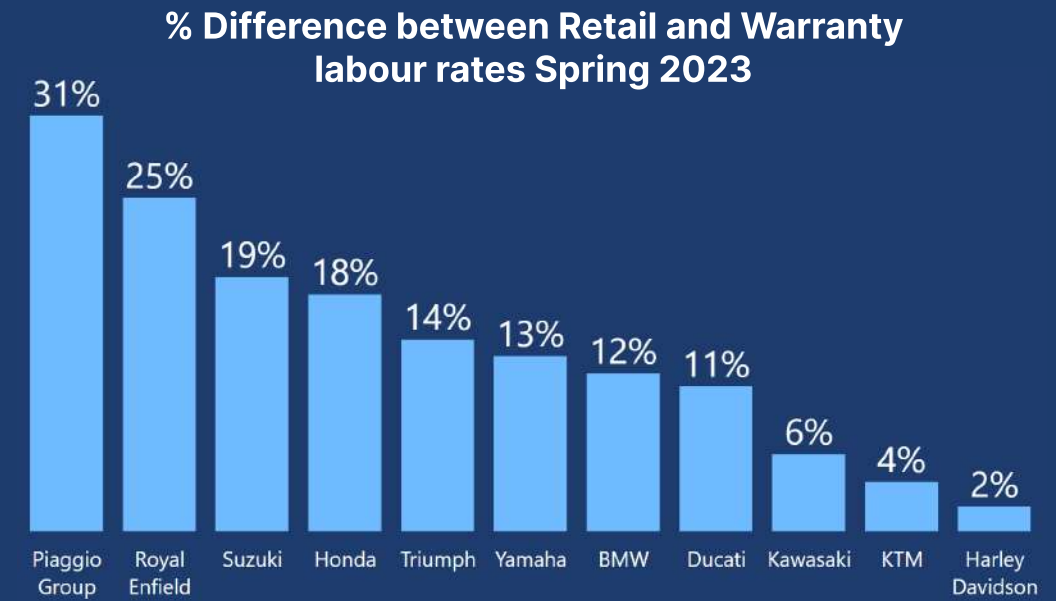
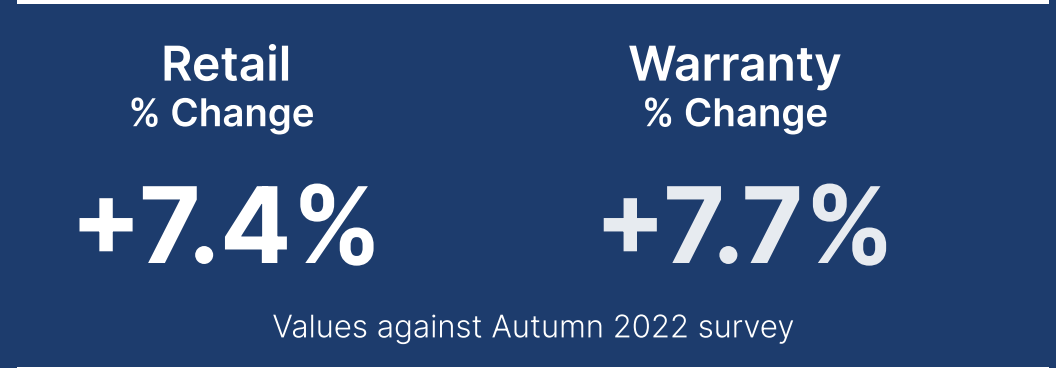
Outside Graph: The Electric products your manufacturer currently offers?

Inside Graph: Your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years?

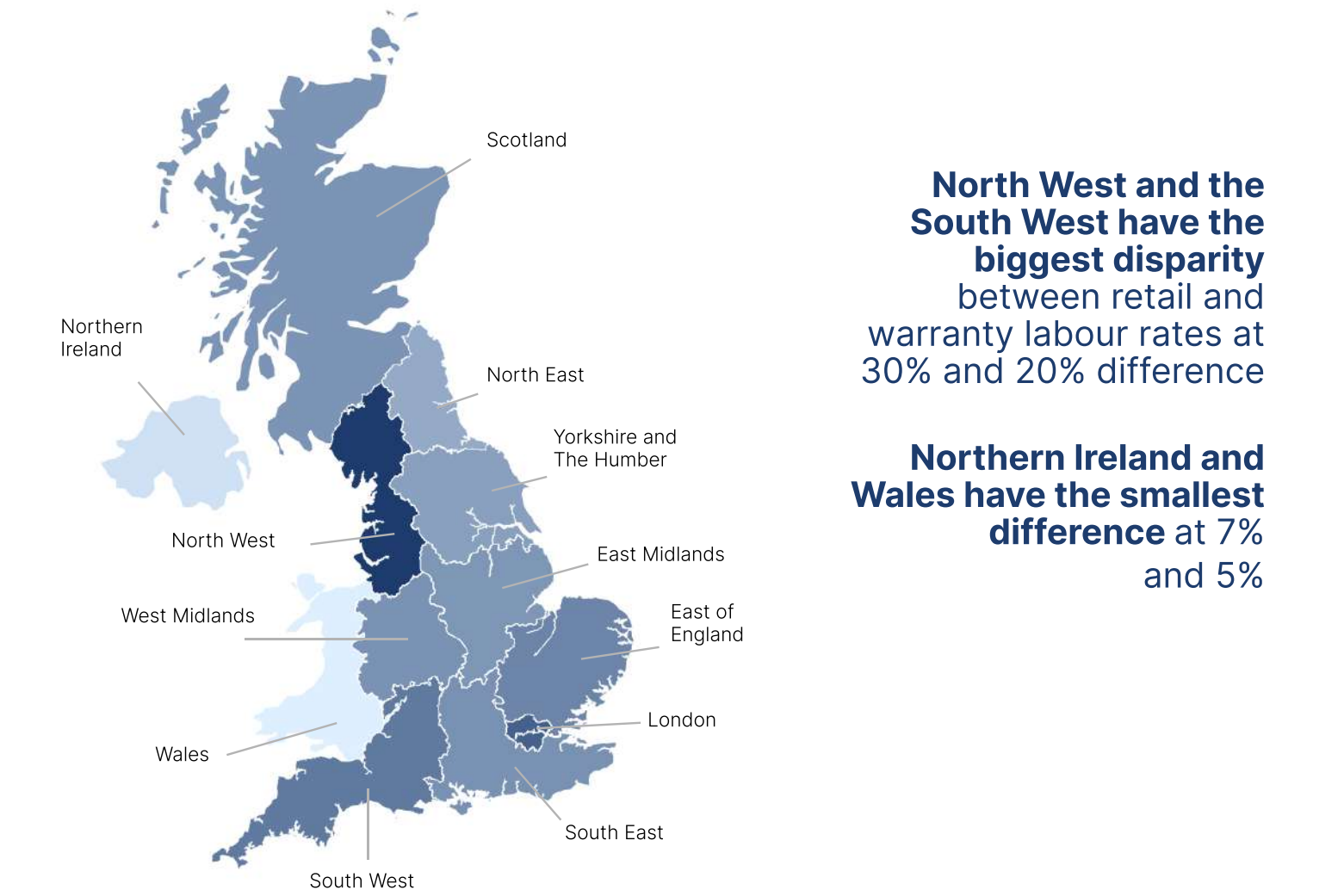
Labour Rates are on the rise

The Spring survey shows an increase in Labour rates of **+7.4% for retail** and **+7.7% for warranty** versus the autumn submission.

Piaggio Group have the biggest difference between retail and warranty at **31%**, with **Harley Davidson and KTM** having the smallest, with both less than **5% difference**.



Difference in Labour Rate by Region (£)



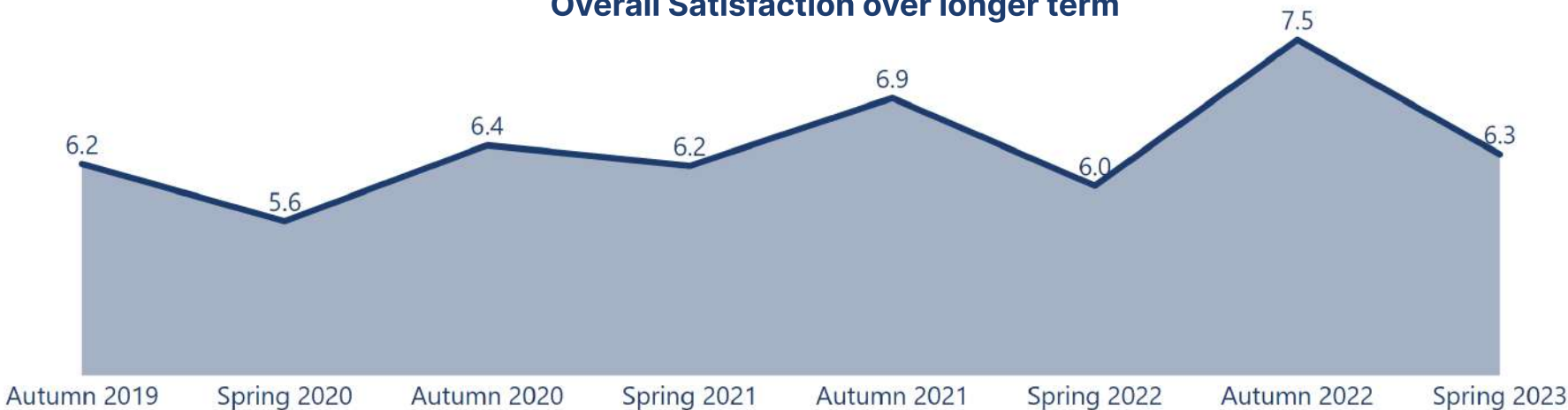
| | East Midlands | East of England | London | North East | North West | Northern Ireland | Scotland | South East | South West | Wales | West Midlands | Yorkshire and The Humber |
|-------------|---------------|-----------------|--------|------------|------------|------------------|----------|------------|------------|-------|---------------|--------------------------|
| Retail | 81.0 | 94.6 | 99.7 | 67.5 | 80.4 | 70.0 | 72.3 | 79.1 | 81.2 | 76.2 | 81.6 | 74.6 |
| Warranty | 68.8 | 80.7 | 82.3 | 57.1 | 59.3 | 65.0 | 59.7 | 66.3 | 66.2 | 72.5 | 68.9 | 63.3 |
| %Difference | 16% | 16% | 19% | 17% | 30% | 7% | 19% | 18% | 20% | 5% | 17% | 16% |

Longer term survey trends

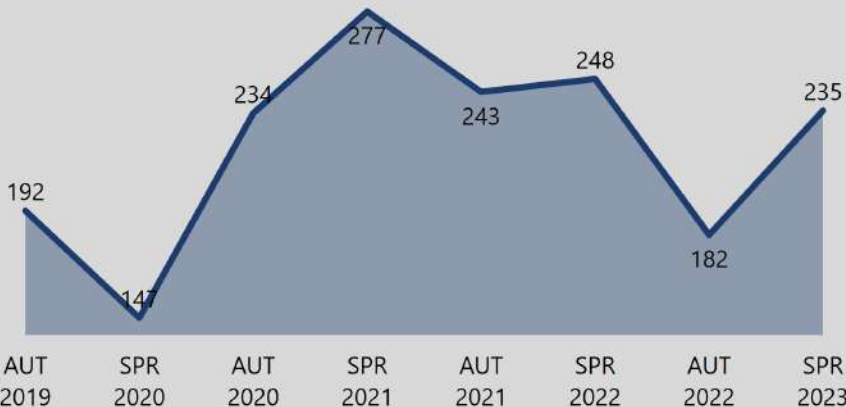
The latest survey shows a drop versus the uptick we saw in the Autumn feedback, potentially reflecting the wider economic and commercial realities facing the dealer body into 2023.

On a longer term view, overall satisfaction remains broadly in line with pre-pandemic levels although there has been some fluctuations during the intervening period.

Overall Satisfaction over longer term



How many new motorcycles have been sold (average)



How many retail used motorcycles have been sold (average)



Future Profitability of your business

Despite the recovery in Autumn's rating, the latest scores show dealer concerns around future profitability remain on par with those seen during the pandemic period.



Manufacturer takes dealers views and opinions into account

Whilst the latest survey sees this measure fall, satisfaction with manufacturer dialogue remains slightly higher than historical standards.



How realistic are your manufacturer's standards compared with the return on investment

Compared to pre-pandemic levels, dealer attitudes toward manufacturer standards appear to have softened in the latest survey



Full Results

Section A

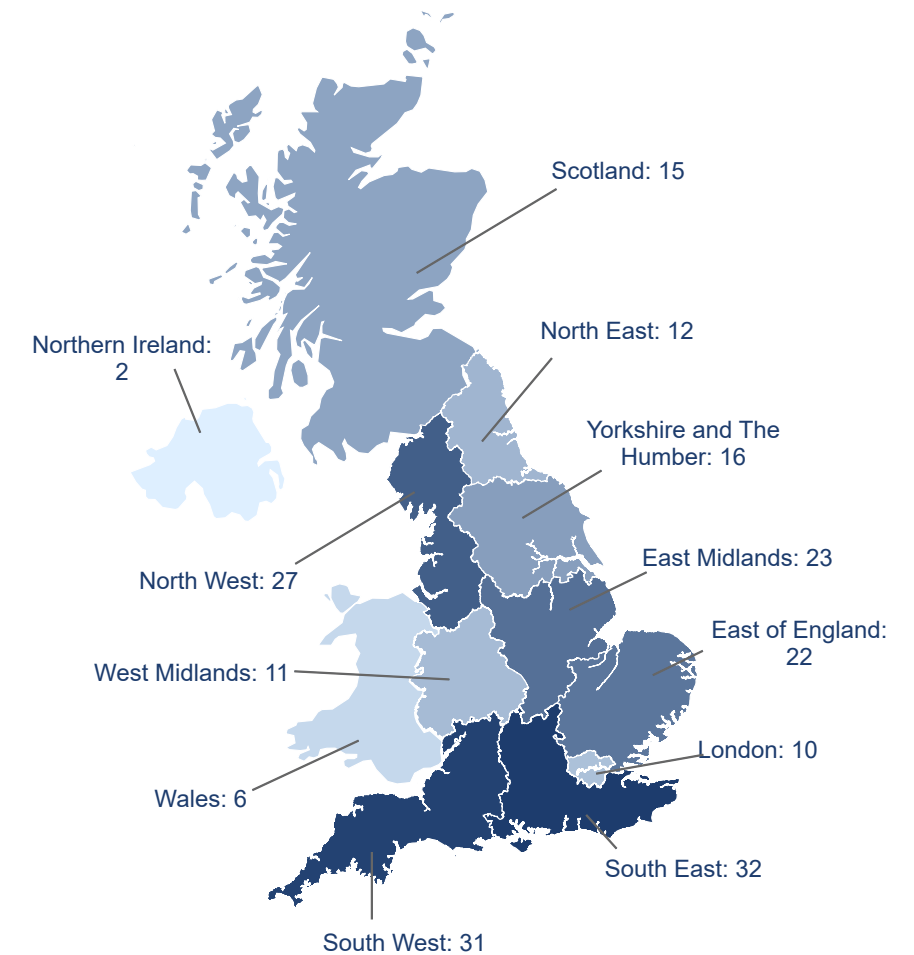
About your business

Response Rate Breakdown - Question 2 by region

| Brand | Responses | Network Size | Response Rate% | Ranking | Autumn 22% | % change | % change |
|-----------------|------------|--------------|----------------|---------|------------|-----------|----------|
| BMW | 13 | 44 | 30% | 7 | 30% | 0 | |
| Ducati | 14 | 30 | 47% | 4 | 93% | -46 | |
| Harley Davidson | 31 | 33 | 94% | 1 | 30% | 64 | |
| Honda | 25 | 47 | 53% | 3 | 29% | 24 | |
| Kawasaki | 10 | 55 | 18% | 9 | 33% | -15 | |
| KTM | 6 | 38 | 16% | 10 | 14% | 2 | |
| Lexmoto* | 7 | 158 | 4% | 12 | 12% | -8 | |
| Piaggio | 18 | 44 | 41% | 5 | 26% | 15 | |
| Royal Enfield | 8 | 77 | 10% | 11 | 15% | -5 | |
| Suzuki | 37 | 63 | 59% | 2 | 44% | 15 | |
| Triumph | 13 | 50 | 26% | 8 | 36% | -10 | |
| Yamaha | 25 | 72 | 35% | 6 | 21% | 14 | |
| Total | 207 | 711 | 29% | | 32% | -3 | |

*Lexmoto have been removed from this edition of the survey due to not reaching the required response rate threshold

Count of responses around the UK by Region

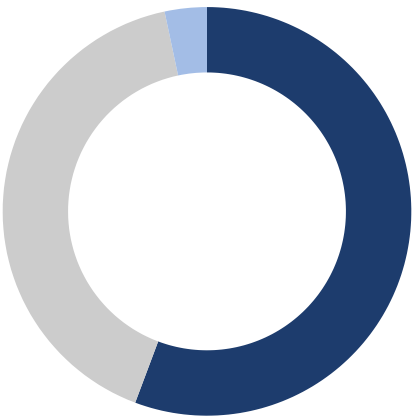
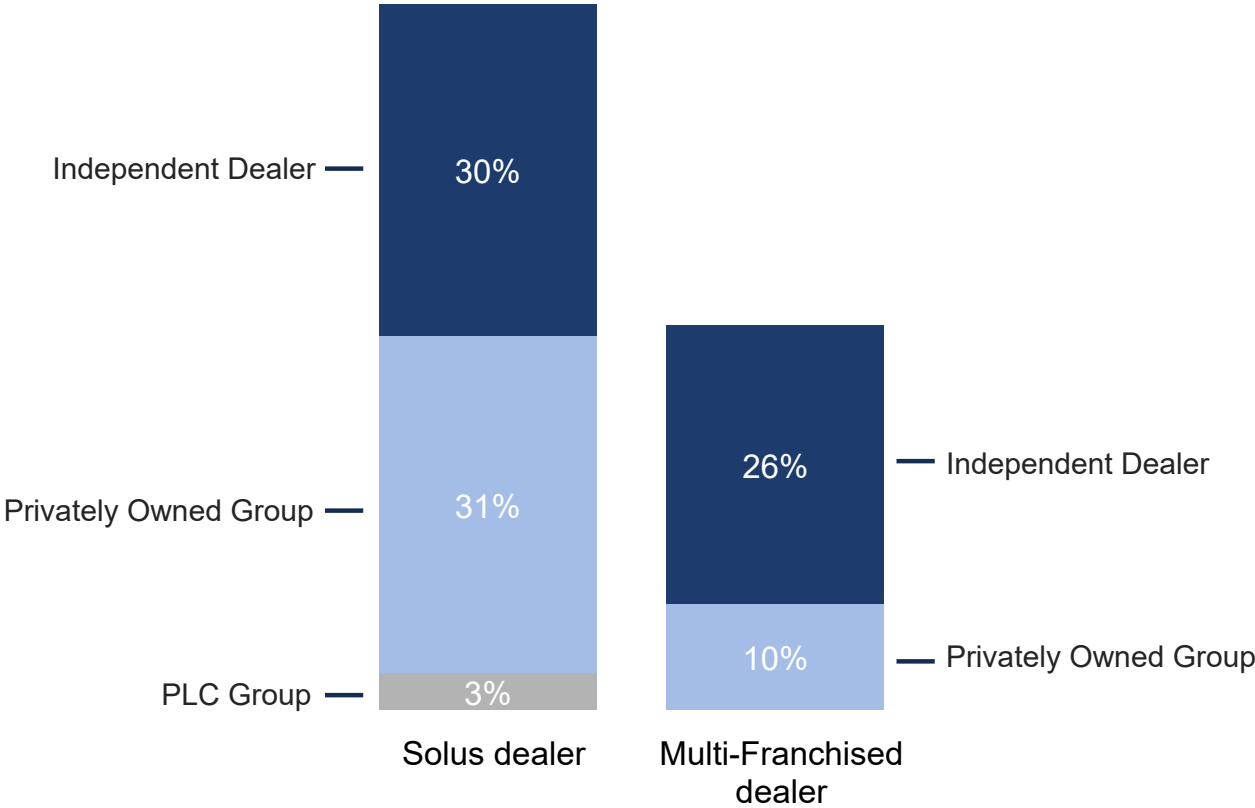


Legend : More Responses = Darker colour

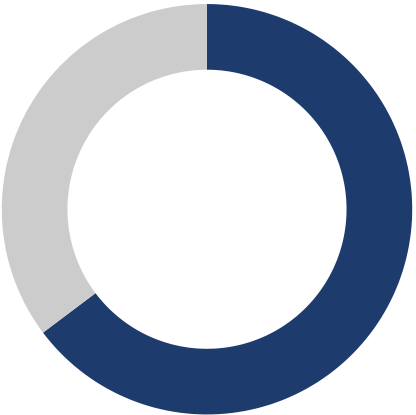
Q3 In this Site are you?

Q4 Is this Site?

% Dealer Ownership by Franchise



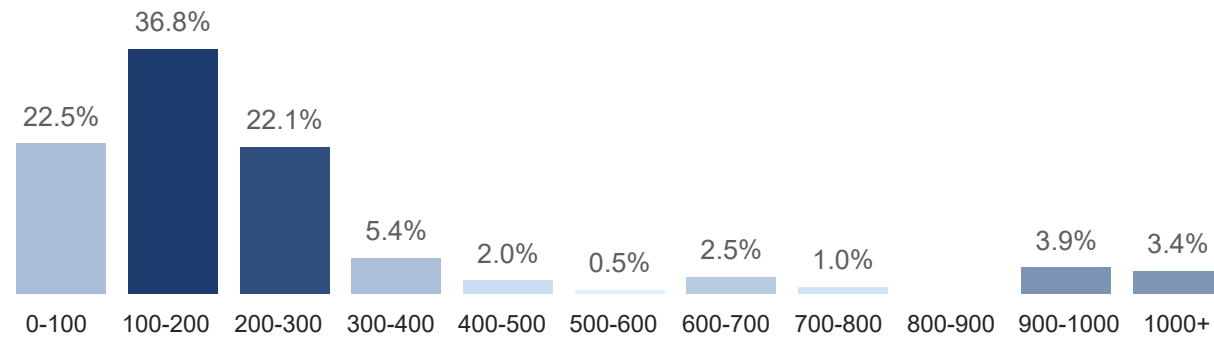
| % Ownership Type | Spring 2023 | Autumn 2022 |
|-----------------------|-------------|-------------|
| Independent Dealer | 56% | 65% |
| Privately Owned Group | 41% | 31% |
| PLC Group | 3% | 4% |



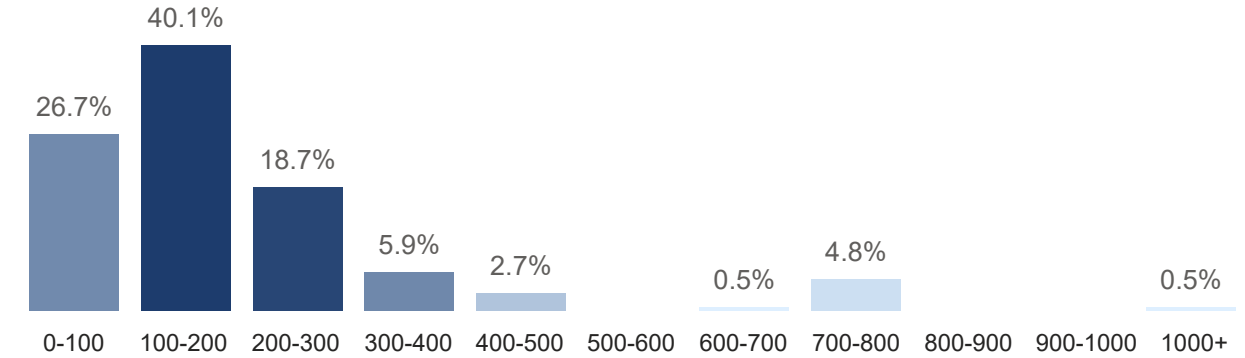
| % Dealer Ownership by Franchise | Spring 2023 | Autumn 2022 |
|---------------------------------|-------------|-------------|
| Solus Dealer | 64% | 63% |
| Multi-Franchised Dealer | 36% | 37% |

Question 6: How many new motorcycles do you sell from this site per annum?

Spring 2023

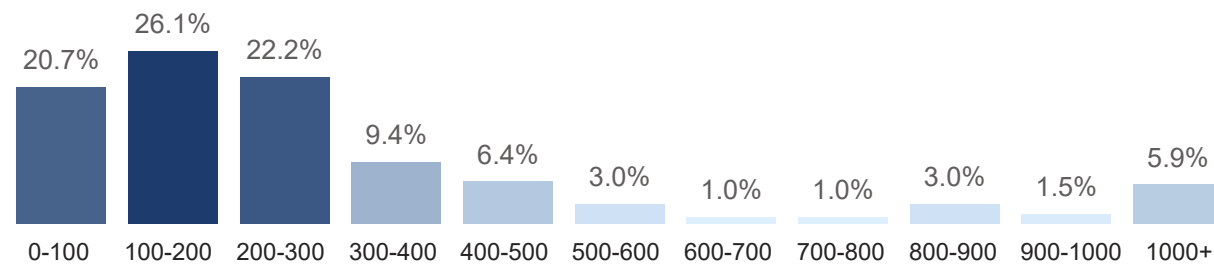


Autumn 2022

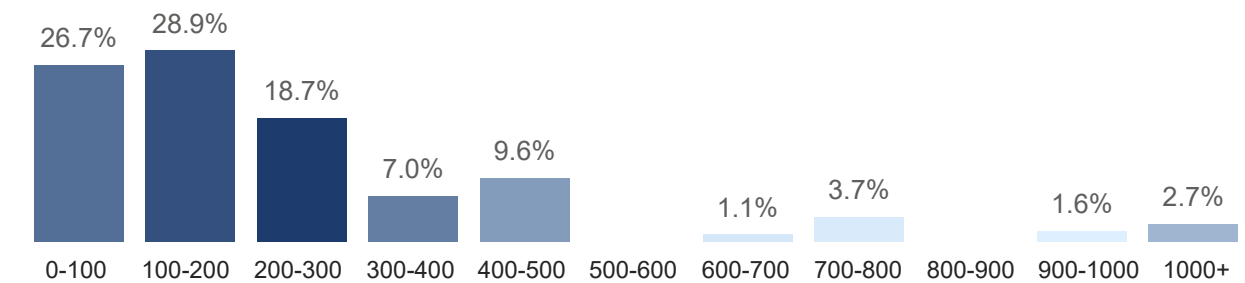


Question 7: How many retail used motorcycles do you sell per annum?

Spring 2023



Autumn 2022



Section B

Sales

Question 8a: The product's price and value against other brands (1= Low, 5= High)

Overall Averages

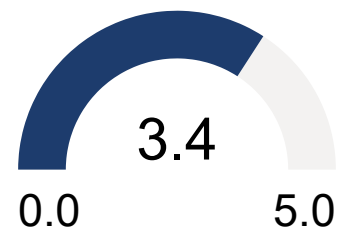
% Change

-10.5%

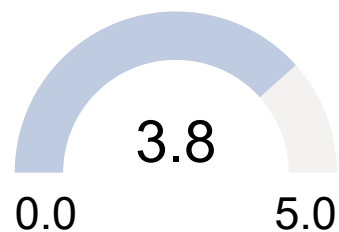
Score Change

-0.4

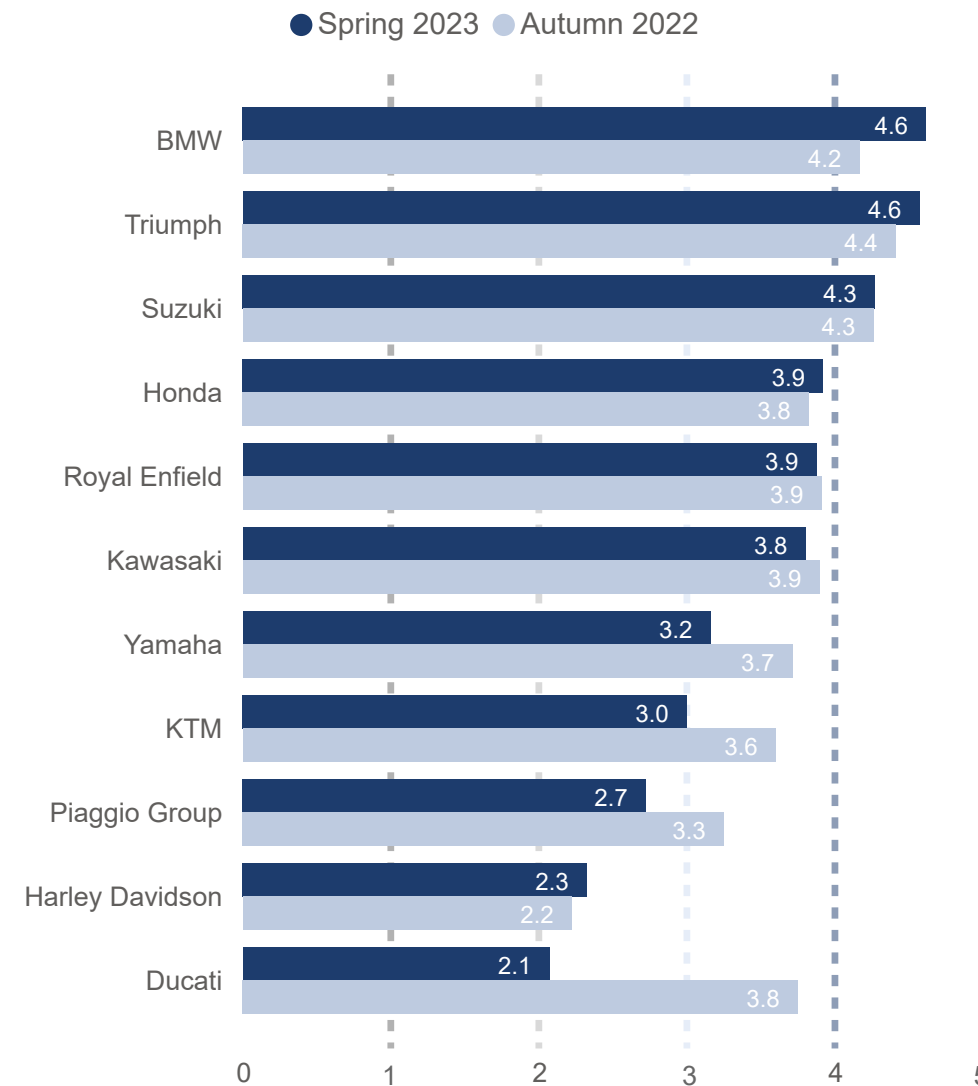
Spring 2023



Autumn 2022



Spring 2023 vs Autumn 2022 Average Score



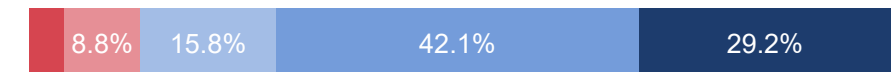
Spread of Responses

1 2 3 4 5

Spring 2023



Autumn 2022



Top 3

BMW
4.6
Triumph
4.6
Suzuki
4.3

Bottom 3

Piaggio Group
2.7
Harley Davidson
2.3
Ducati
2.1

Question 8b: How realistic is you target negotiations and performance related bonus in terms of achievement (1= Low, 5= High)

Overall Averages

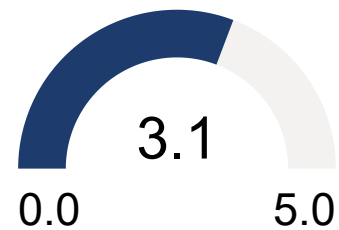
% Change

-3.1%

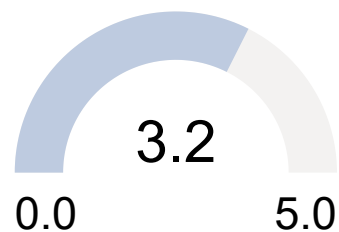
Score Change

-0.1

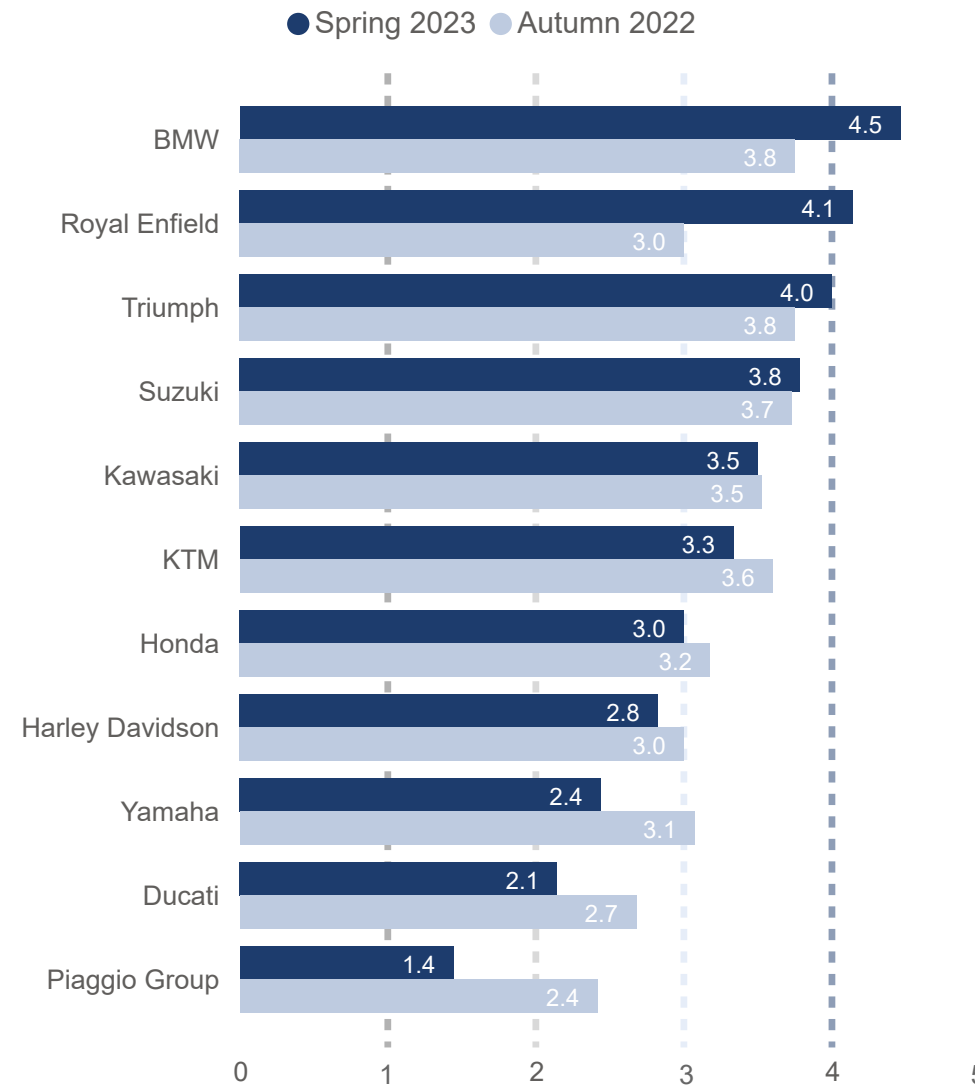
Spring 2023



Autumn 2022



Spring 2023 vs Autumn 2022 Average Score



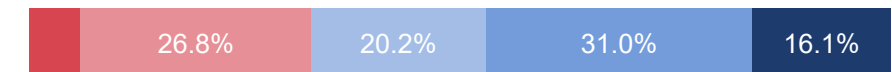
Spread of Responses

1 2 3 4 5

Spring 2023



Autumn 2022



Top 3

BMW
4.5

Royal Enfield
4.1

Triumph
4.0

Bottom 3

Yamaha
2.4

Ducati
2.1

Piaggio Group
1.4

Question 9a: Your manufacturer's policy for the supply and stocking of motorcycles (1= Low, 5= High)

Overall Averages

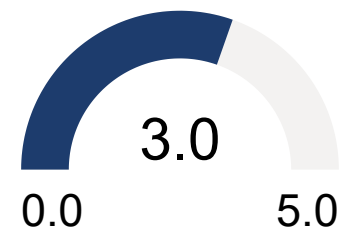
% Change

-3.2%

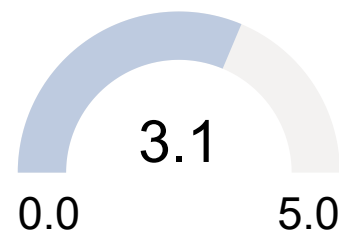
Score Change

-0.1

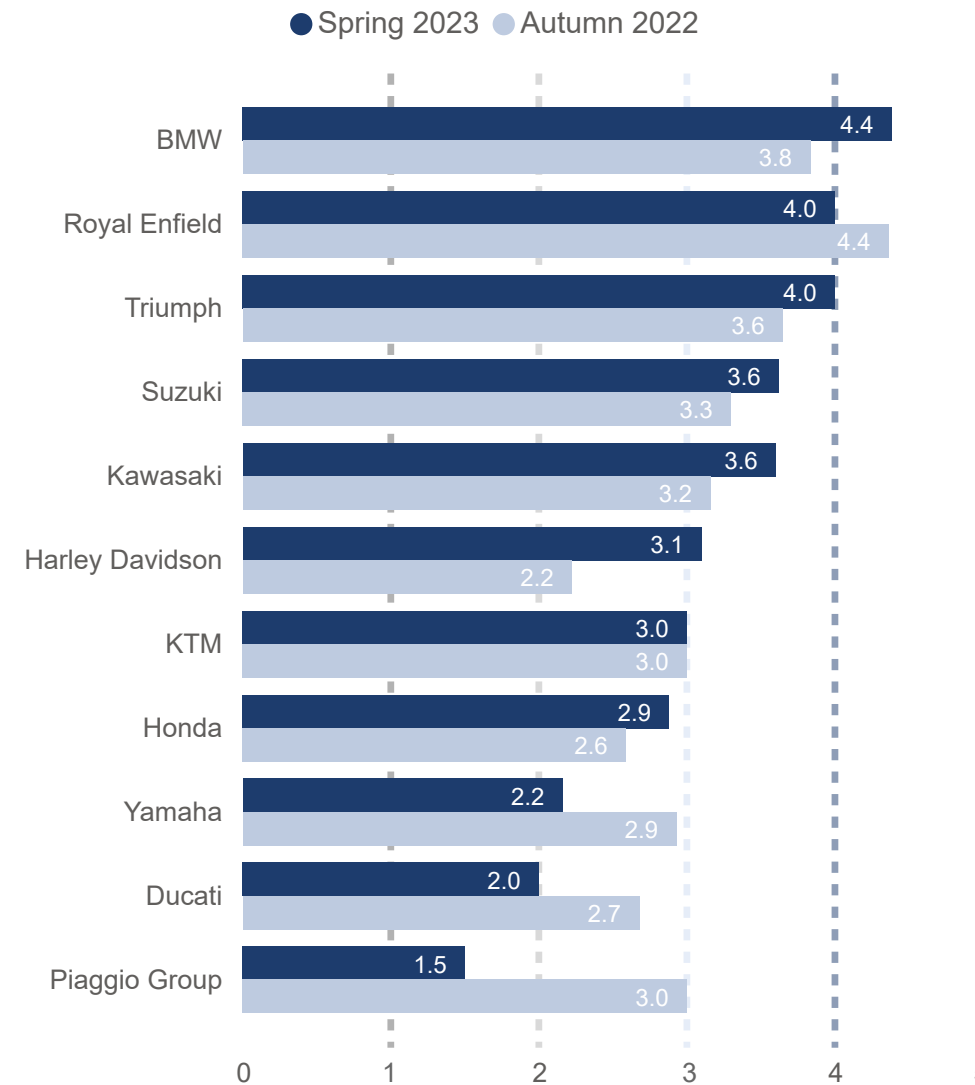
Spring 2023



Autumn 2022



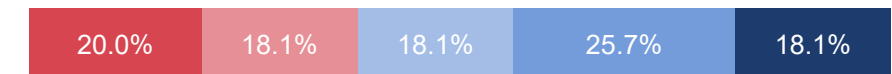
Spring 2023 vs Autumn 2022 Average Score



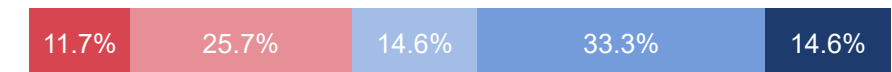
Spread of Responses

● 1 ● 2 ● 3 ● 4 ● 5

Spring 2023



Autumn 2022



Top 3

BMW
4.4

Royal Enfield
4.0

Triumph
4.0

Bottom 3

Yamaha
2.2

Ducati
2.0

Piaggio Group
1.5

Question 9c: How realistic is your target negotiations and performance related bonus in terms of achievement (1= Low, 5= High)

Overall Averages

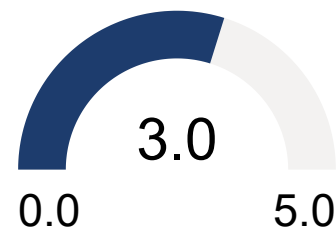
% Change

-6.3%

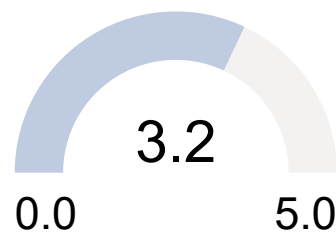
Score Change

-0.2

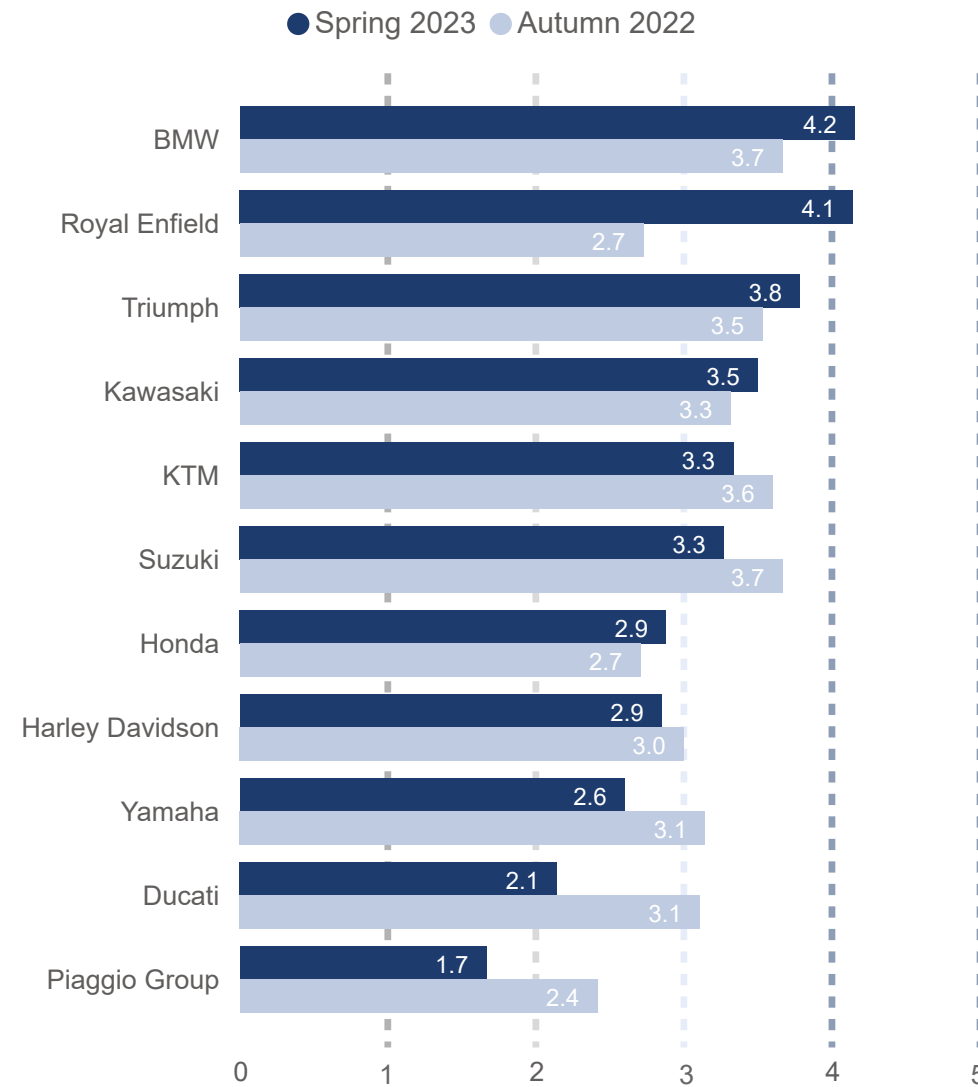
Spring 2023



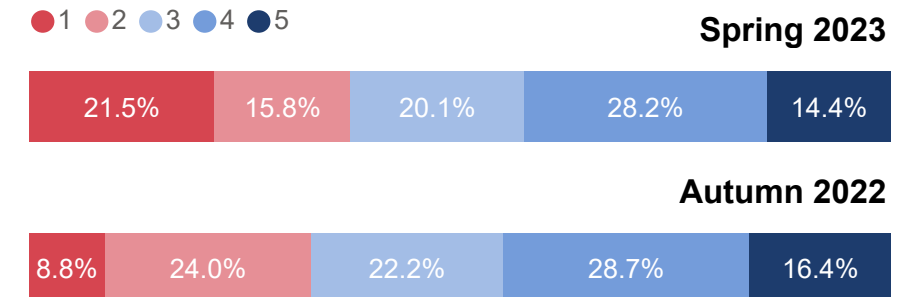
Autumn 2022



Spring 2023 vs Autumn 2022 Average Score



Spread of Responses



Top 3

BMW
4.2

Royal Enfield
4.1

Triumph
3.8

Bottom 3

Yamaha
2.6

Ducati
2.1

Piaggio Group
1.7

Question 10a: The brand image (1= Low, 5= High)

Overall Averages

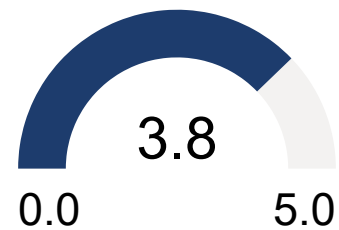
% Change

-11.6%

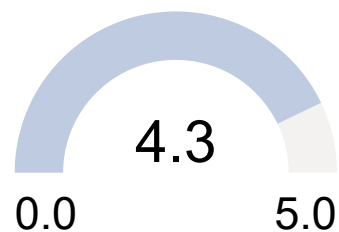
Score Change

-0.5

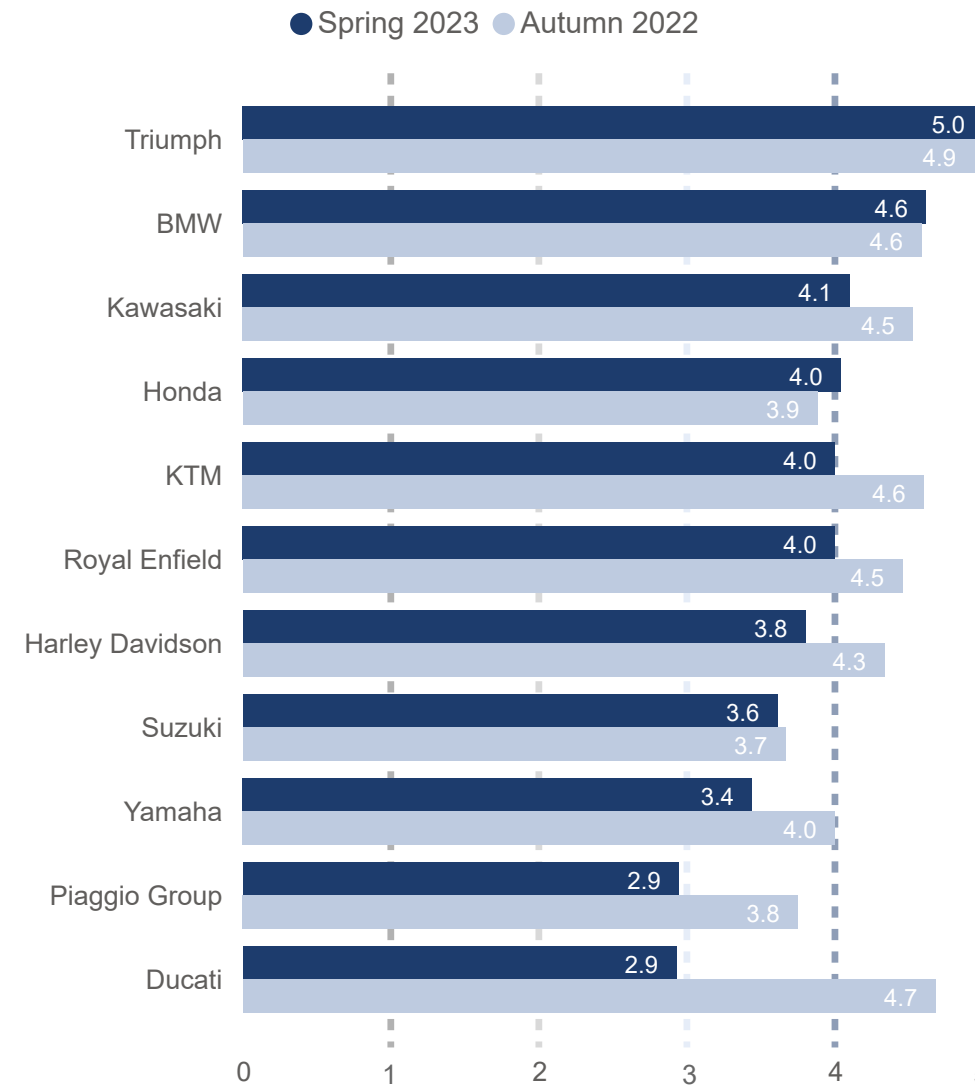
Spring 2023



Autumn 2022



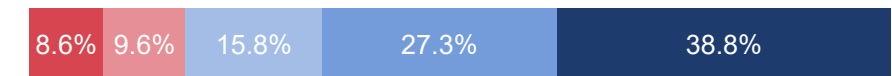
Spring 2023 vs Autumn 2022 Average Score



Spread of Responses

1 2 3 4 5

Spring 2023



Autumn 2022



Top 3

Triumph

5.0

BMW

4.6

Kawasaki

4.1

Bottom 3

Yamaha

3.4

Piaggio Group

2.9

Ducati

2.9

Question 10b: The frequency of new models (1= Low, 5= High)

Overall Averages

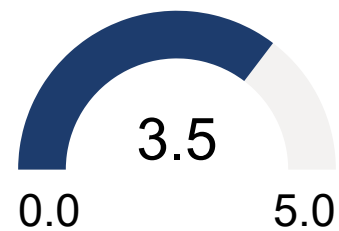
% Change

-12.5%

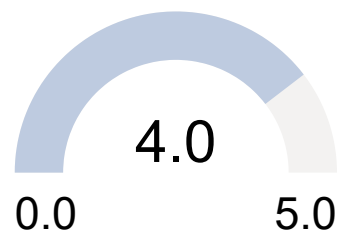
Score Change

-0.5

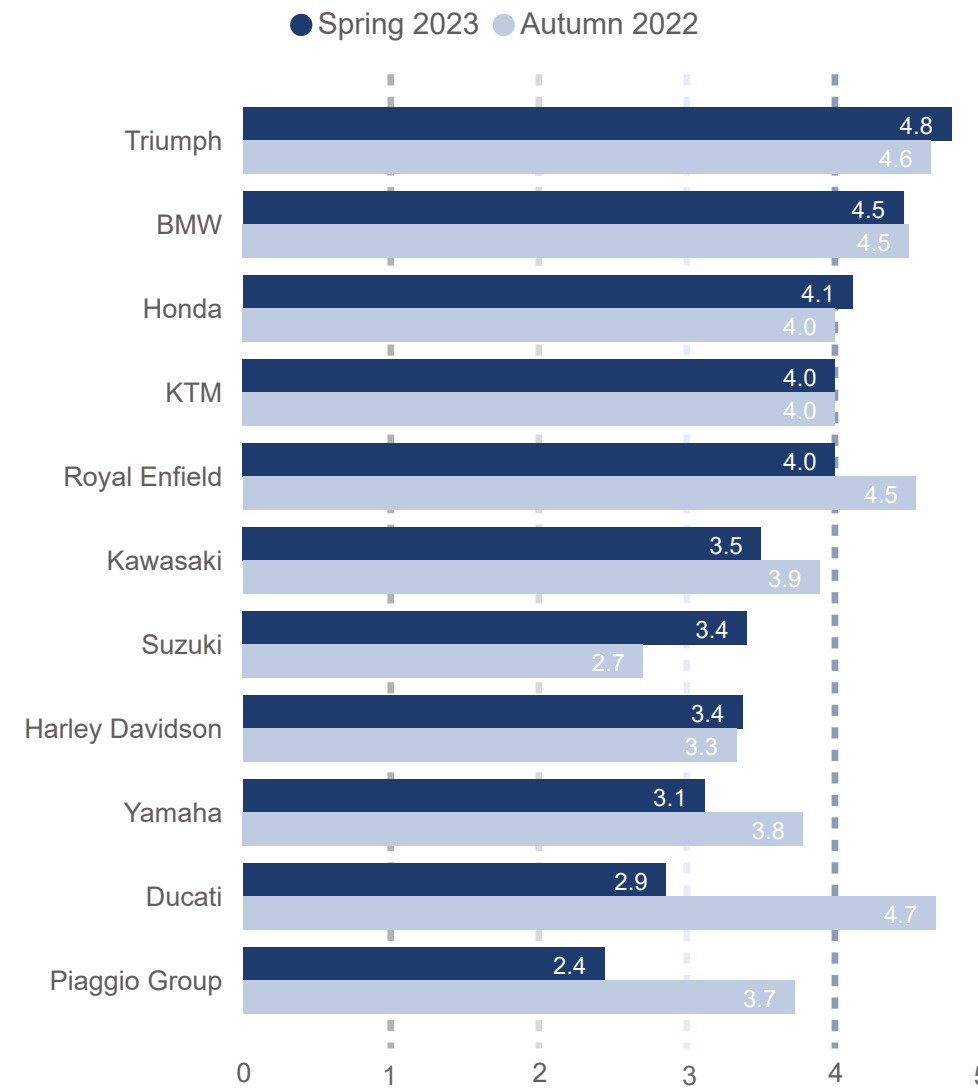
Spring 2023



Autumn 2022



Spring 2023 vs Autumn 2022 Average Score



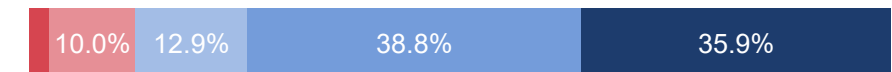
Spread of Responses

1 2 3 4 5

Spring 2023



Autumn 2022



Top 3

Triumph
4.8
BMW
4.5
Honda
4.1

Bottom 3

Yamaha
3.1
Ducati
2.9
Piaggio Group
2.4

Question 10c: Retail sales incentives and promotions (1= Low, 5= High)

Overall Averages

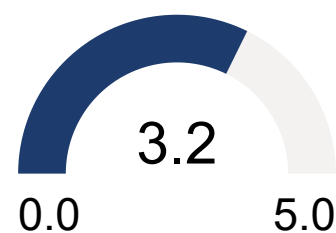
% Change

-3.0%

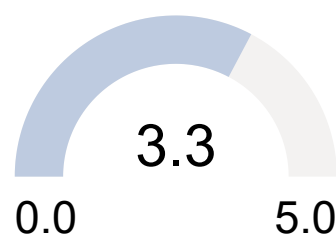
Score Change

-0.1

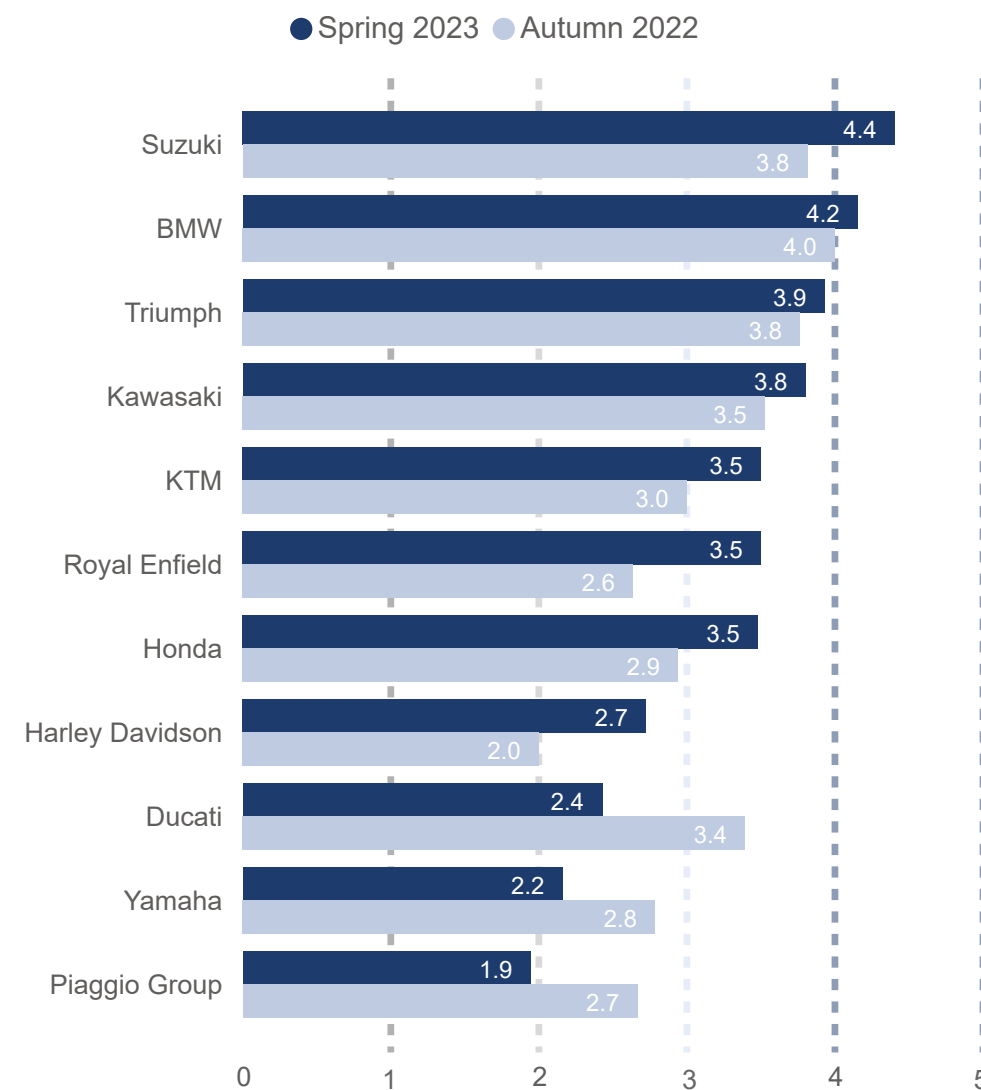
Spring 2023



Autumn 2022



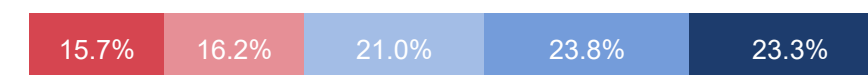
Spring 2023 vs Autumn 2022 Average Score



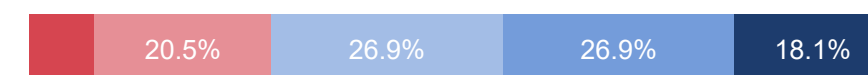
Spread of Responses

1 2 3 4 5

Spring 2023



Autumn 2022



Top 3

Suzuki
4.4

BMW
4.2

Triumph
3.9

Bottom 3

Ducati
2.4

Yamaha
2.2

Piaggio Group
1.9

Section C

Service and Parts

Question 12: How satisfied or dissatisfied are you with your manufacturer's warranty policy? (1= Low, 5= High)

Overall Averages

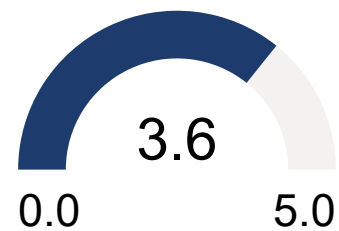
% Change

-5.3%

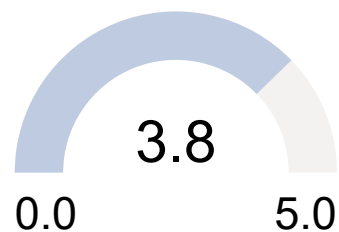
Score Change

-0.2

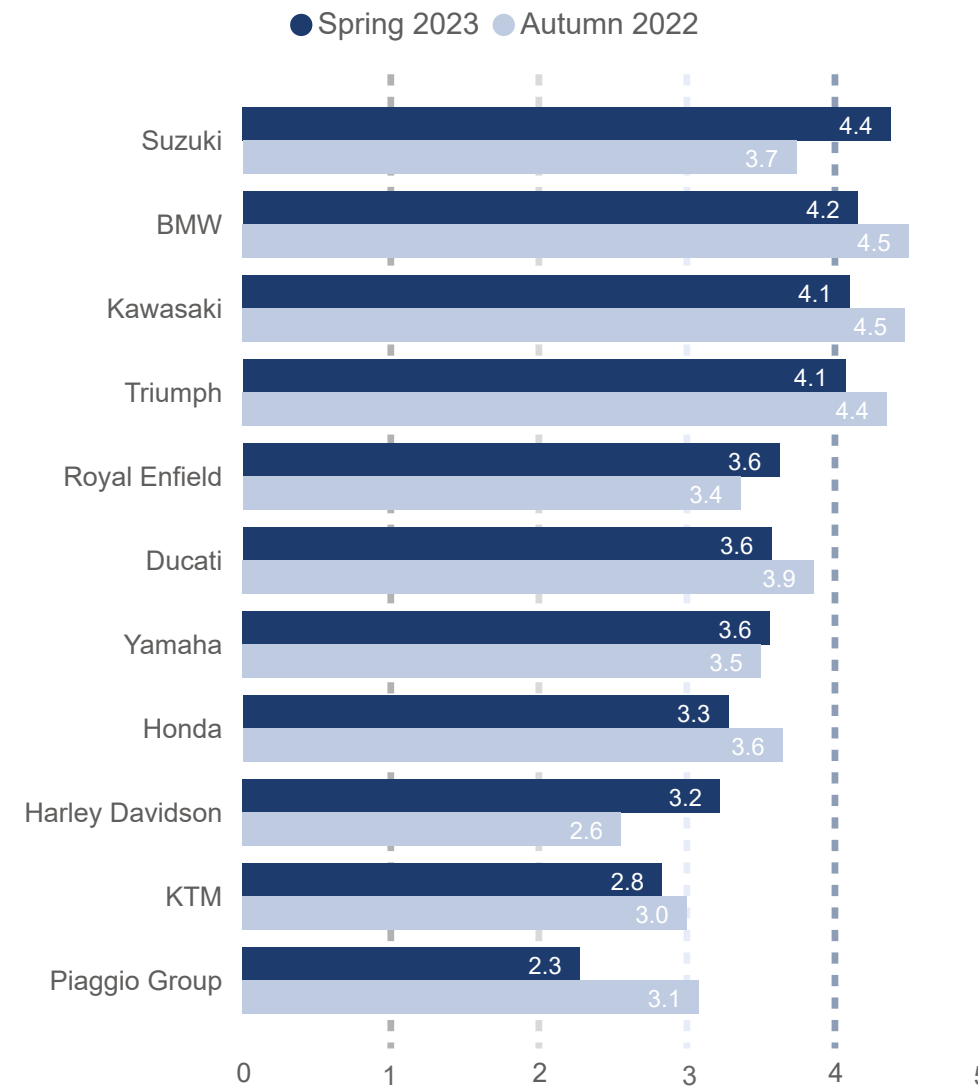
Spring 2023



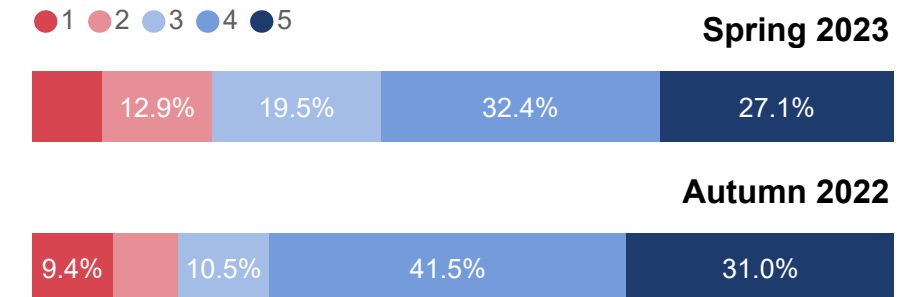
Autumn 2022



Spring 2023 vs Autumn 2022 Average Score



Spread of Responses



Top 3

Suzuki
4.4

BMW
4.2

Kawasaki
4.1

Bottom 3

Harley Davidson
3.2

KTM
2.8

Piaggio Group
2.3

Question 13a: What is your labour rate for retail? (£)

Overall Averages

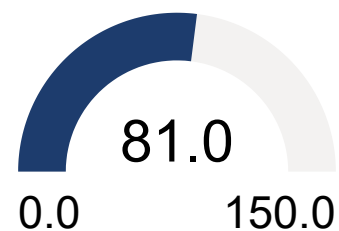
% Change

7.4%

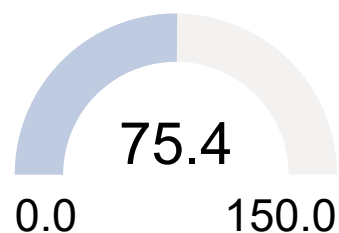
Rate Change (£)

+5.60

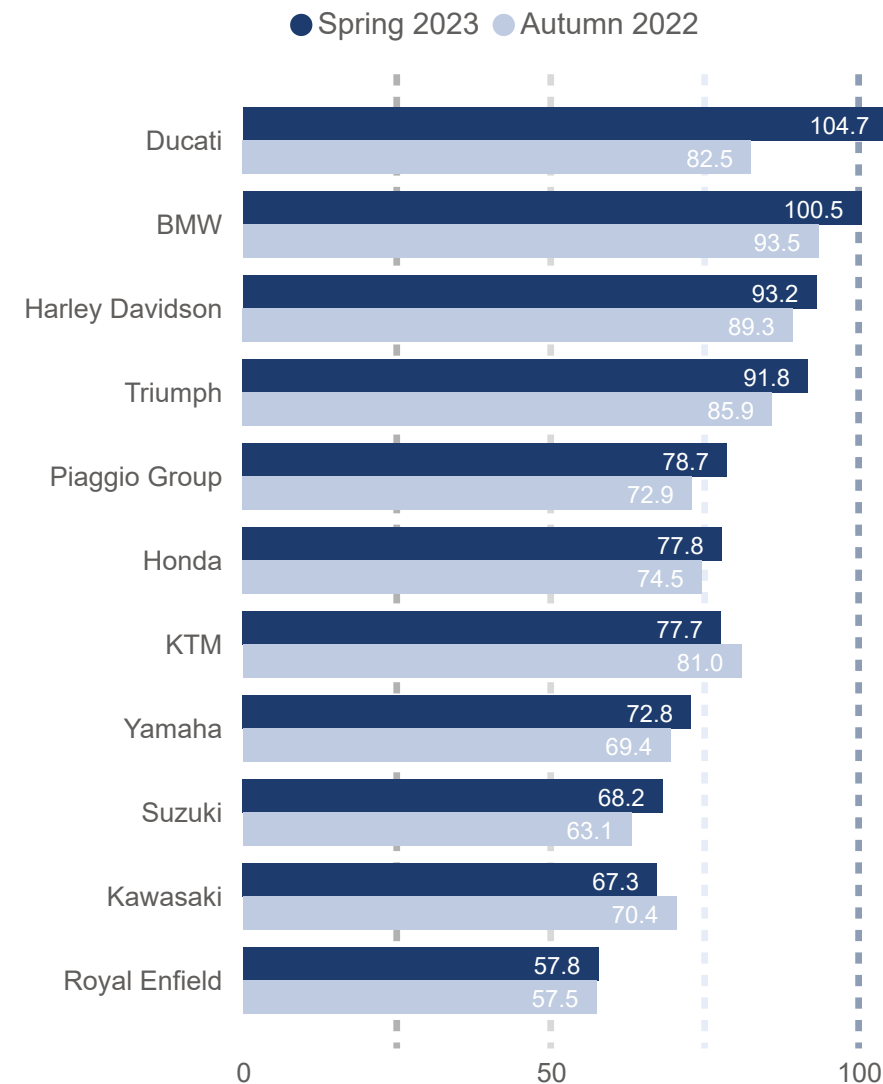
Spring 2023 (£)



Autumn 2022 (£)

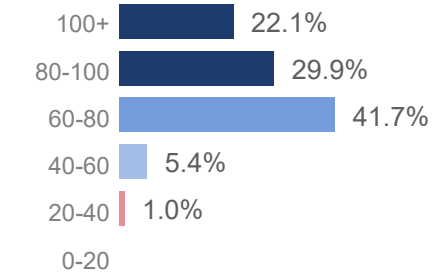


Spring 2023 vs Autumn 2022 Average Rate (£)

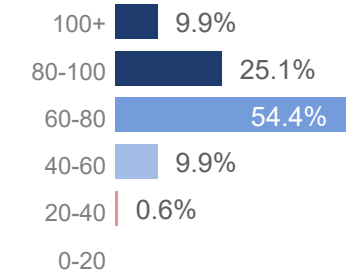


Spread of Labour Rate

Spring 2023



Autumn 2022



Highest (£)

Ducati
104.7

BMW
100.5

Harley Davidson
93.2

Lowest (£)

Suzuki
68.2

Kawasaki
67.3

Royal Enfield
57.8

Question 14a: What is your labour rate for warranty before VAT? (£)

Overall Averages

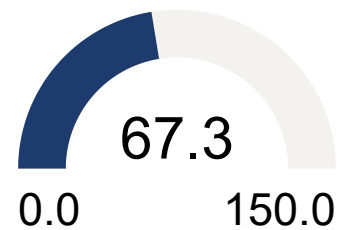
% Change

7.7%

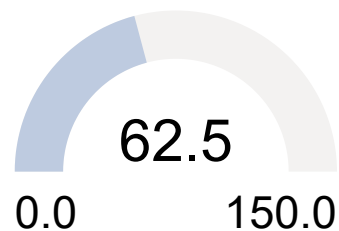
Rate Change (£)

+4.80

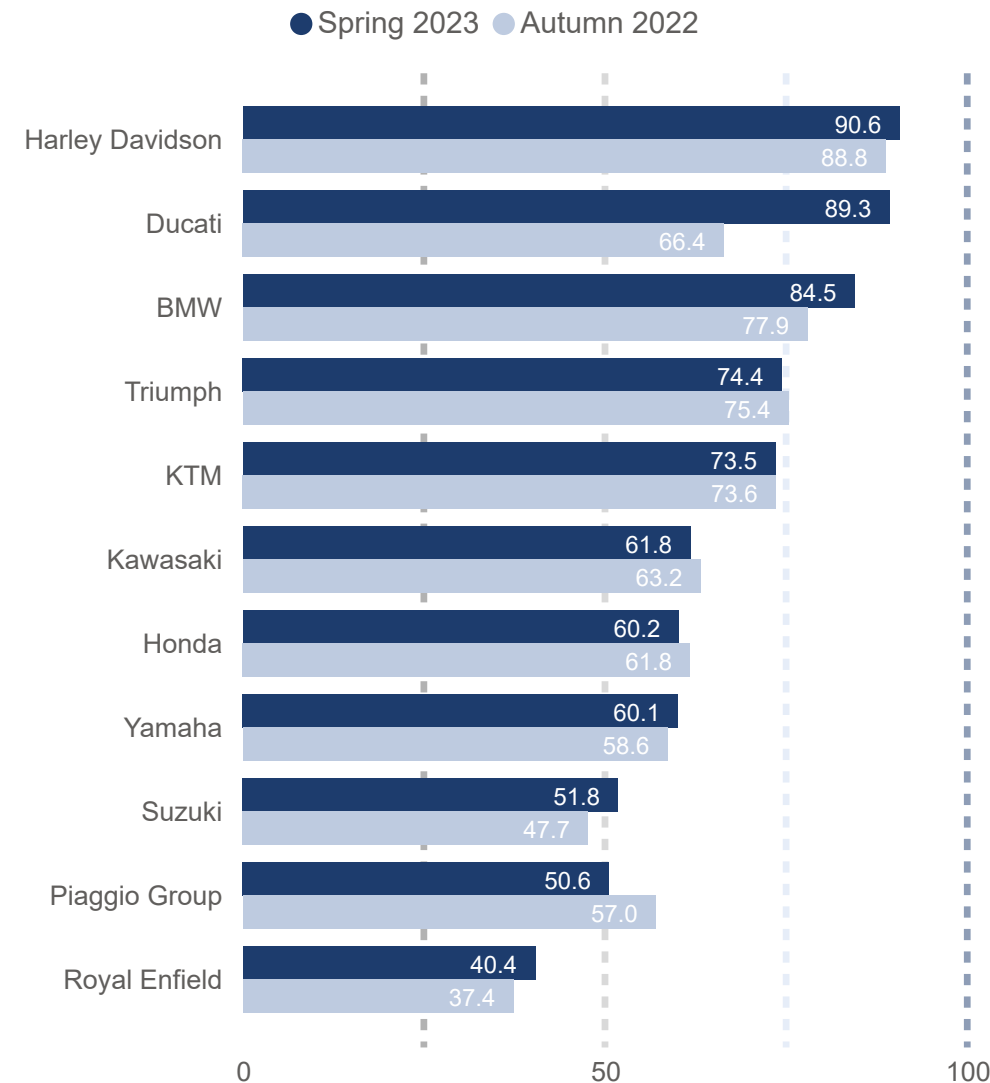
Spring 2023 (£)



Autumn 2022 (£)

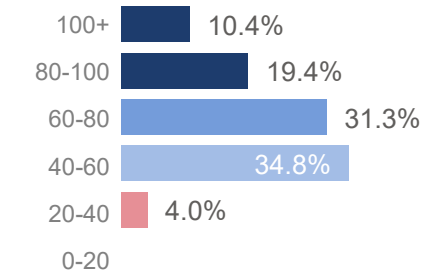


Spring 2023 vs Autumn 2022 Average Rate (£)

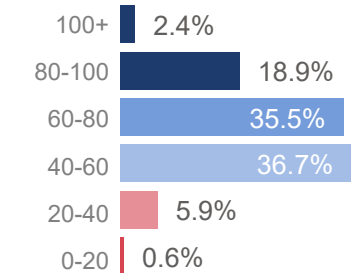


Spread of Labour Rate

Spring 2023



Autumn 2022



Highest (£)

Harley Davidson

90.6

Ducati

89.3

BMW

84.5

Lowest (£)

Suzuki

51.8

Piaggio Group

50.6

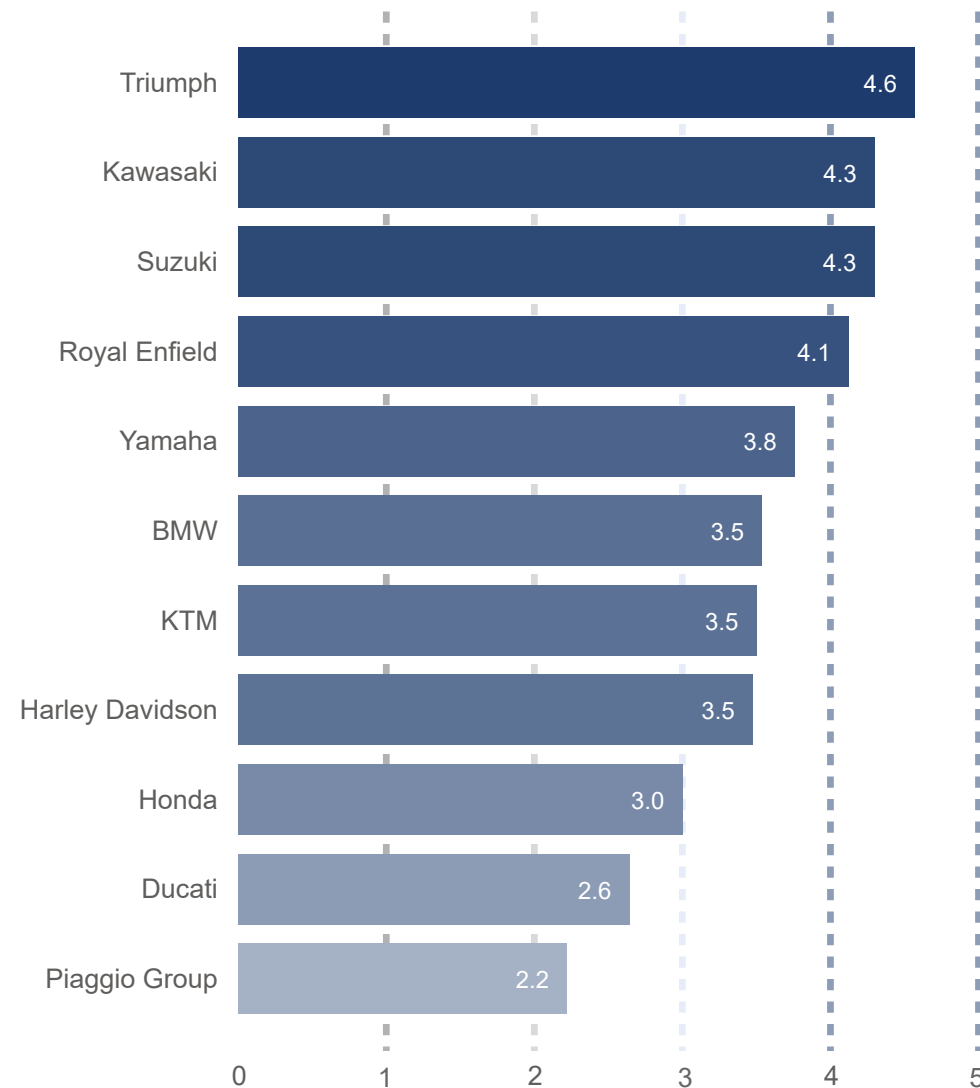
Royal Enfield

40.4

Question 15a: Timely and fair settlement of warranty claims? (1= Low, 5= High)

New Question for Spring 2023

Spring 2023 Average Score



Spread of Responses

1 2 3 4 5



Spring 23

Top 3

Triumph
4.6

Kawasaki
4.3

Suzuki
4.3

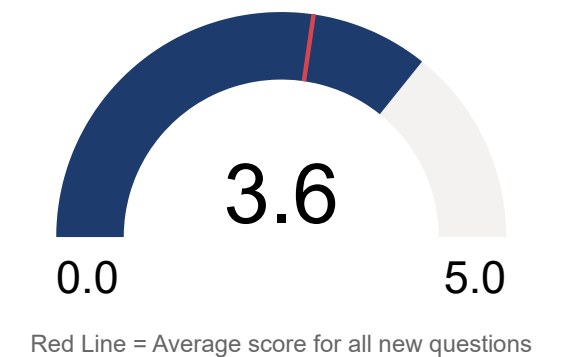
Bottom 3

Honda
3.0

Ducati
2.6

Piaggio Group
2.2

Spring 2023 Overall Average



Question 15b: Availability of technical support? (1= Low, 5= High)

Overall Averages

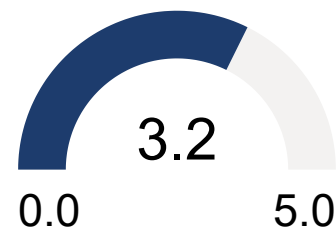
% Change

-5.9%

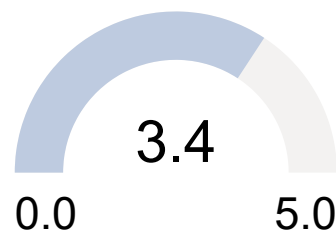
Score Change

-0.2

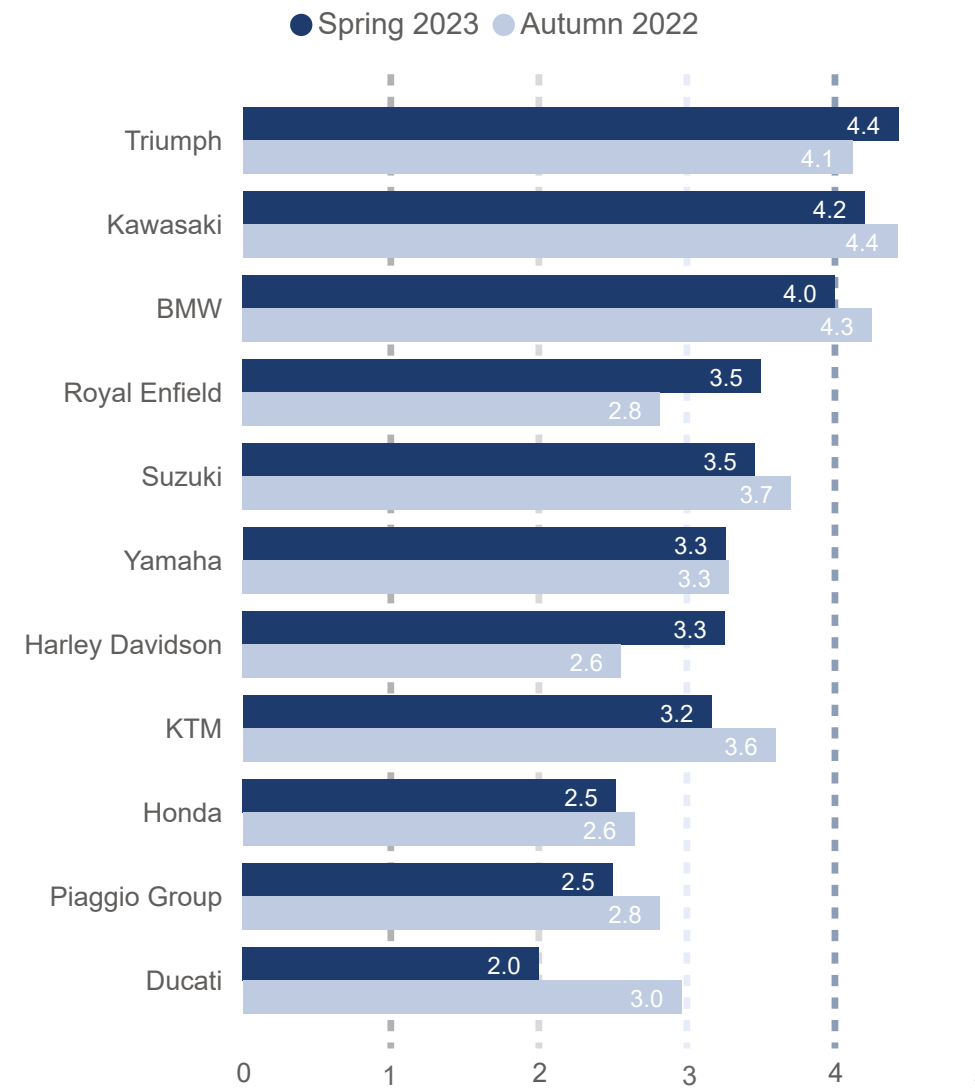
Spring 2023



Autumn 2022



Spring 2023 vs Autumn 2022 Average Score



Spread of Responses

1 2 3 4 5

Spring 2023



Autumn 2022



Top 3

Triumph

4.4

Kawasaki

4.2

BMW

4.0

Bottom 3

Honda

2.5

Piaggio Group

2.5

Ducati

2.0

Section D

Profitability

Question 17: How satisfied or dissatisfied are you with the profit return by representing your franchise? (1= Low, 5= High)

Overall Averages

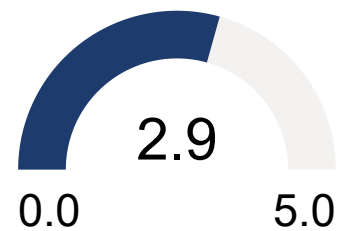
% Change

-14.7%

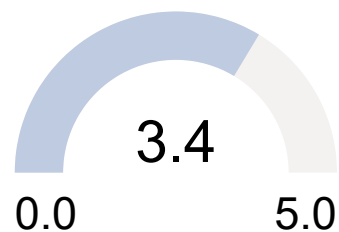
Score Change

-0.5

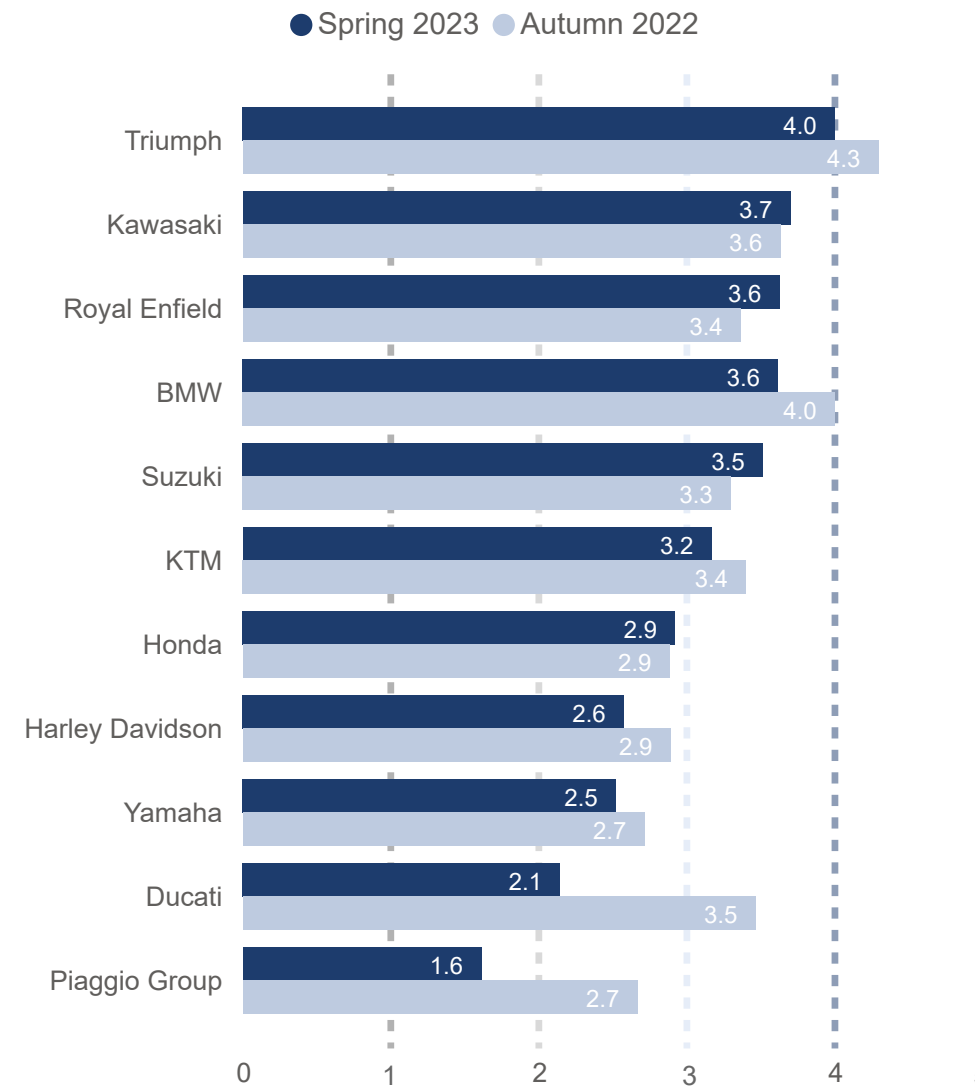
Spring 2023



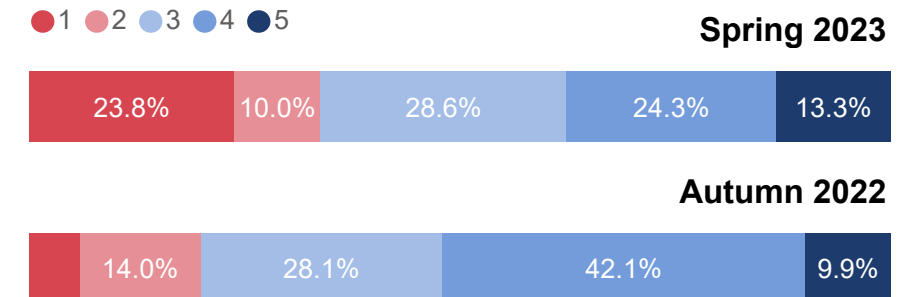
Autumn 2022



Spring 2023 vs Autumn 2022 Average Score



Spread of Responses



Top 3

Triumph
4.0

Kawasaki
3.7

Royal Enfield
3.6

Bottom 3

Yamaha
2.5

Ducati
2.1

Piaggio Group
1.6

Question 18a: Future profitability of your business? (1= Low, 5= High)

Overall Averages

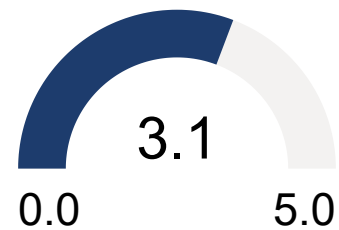
% Change

-13.9%

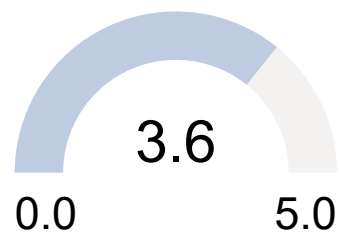
Score Change

-0.5

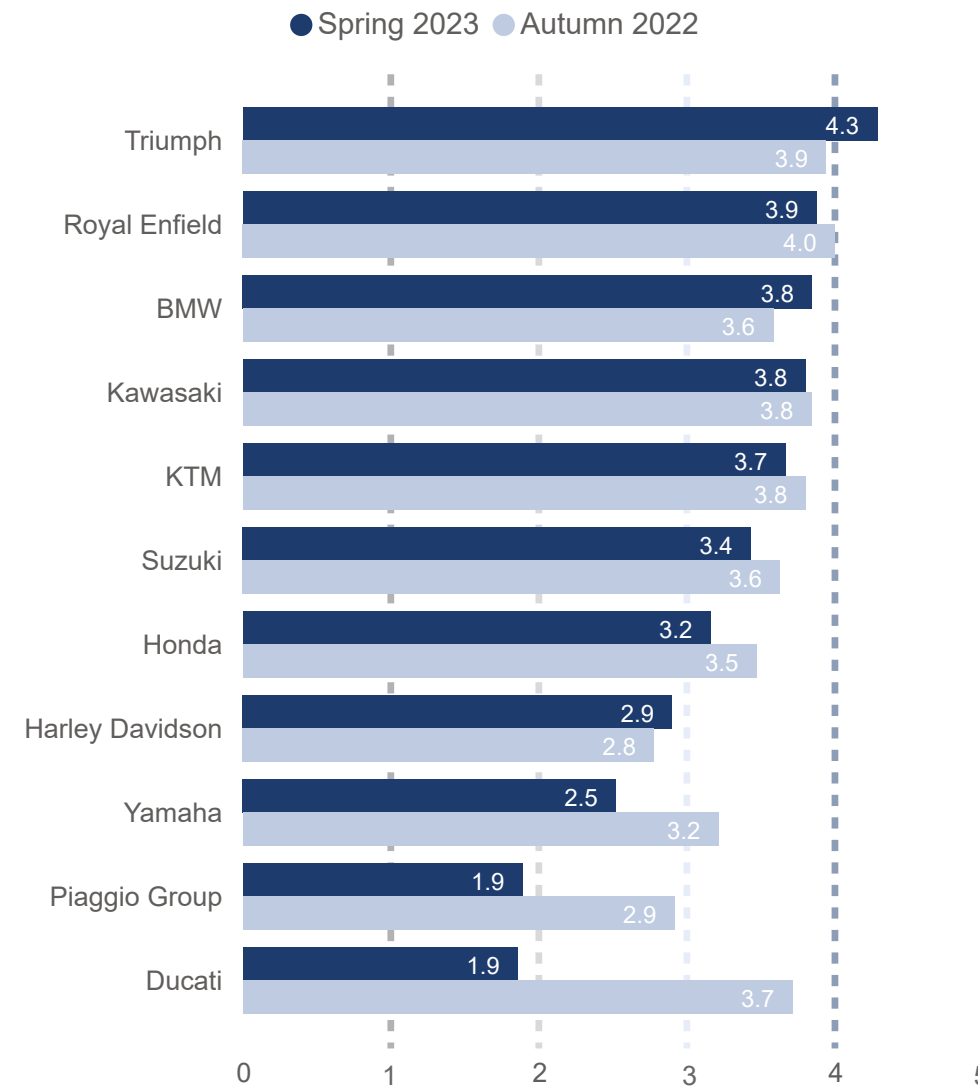
Spring 2023



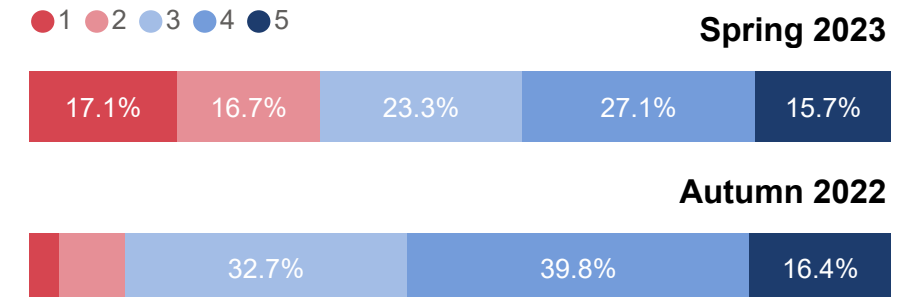
Autumn 2022



Spring 2023 vs Autumn 2022 Average Score



Spread of Responses



Top 3

Triumph
4.3

Royal Enfield
3.9

BMW
3.8

Bottom 3

Yamaha
2.5

Piaggio Group
1.9

Ducati
1.9

Question 19a: The dealer standards expected by your manufacturer? (1= Low, 5= High)

Overall Averages

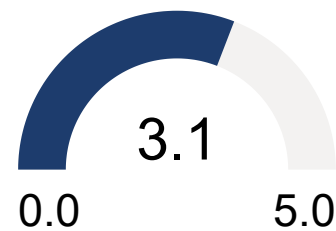
% Change

-8.8%

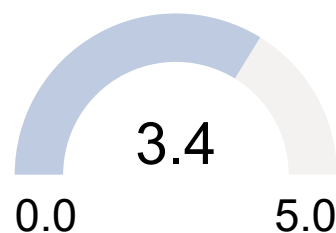
Score Change

-0.3

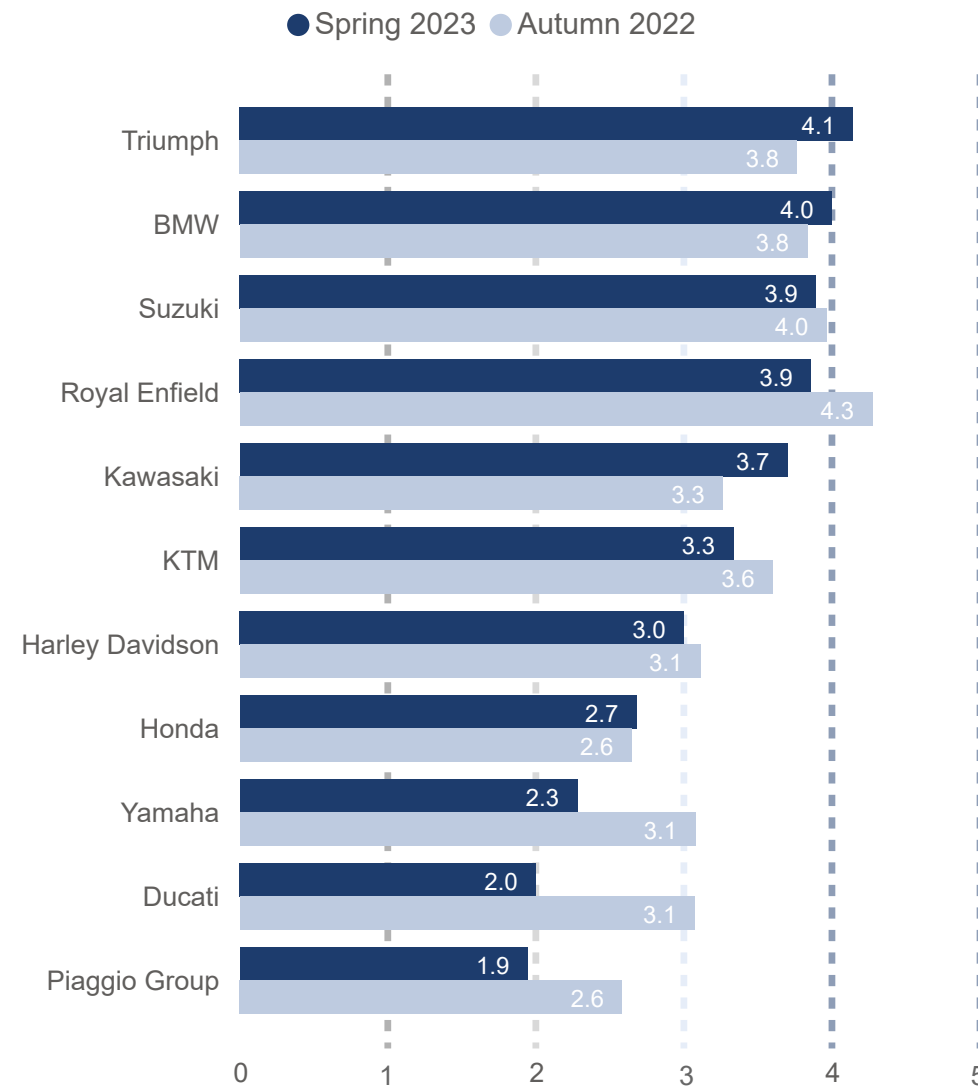
Spring 2023



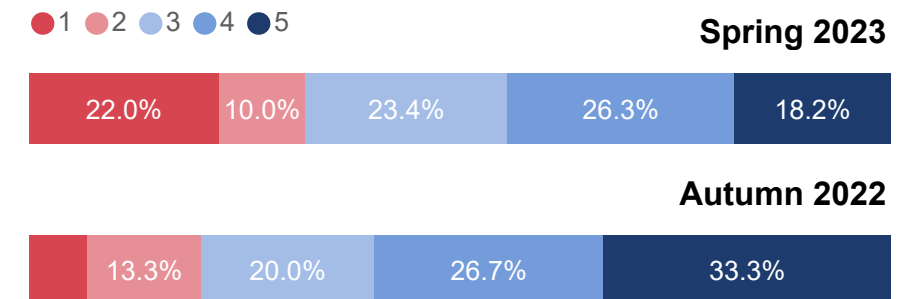
Autumn 2022



Spring 2023 vs Autumn 2022 Average Score



Spread of Responses



Top 3

Triumph
4.1
BMW
4.0
Suzuki
3.9

Bottom 3

Yamaha
2.3
Ducati
2.0
Piaggio Group
1.9

Question 19b: How realistic do you feel your manufacturer's standards are compared with the return on investment/reward? (1= Low, 5= High)

Overall Averages

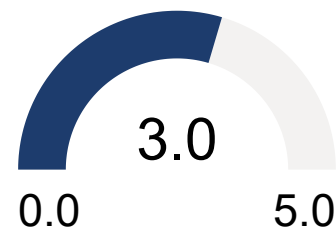
% Change

-6.3%

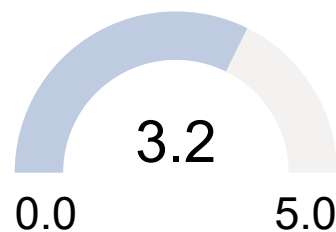
Score Change

-0.2

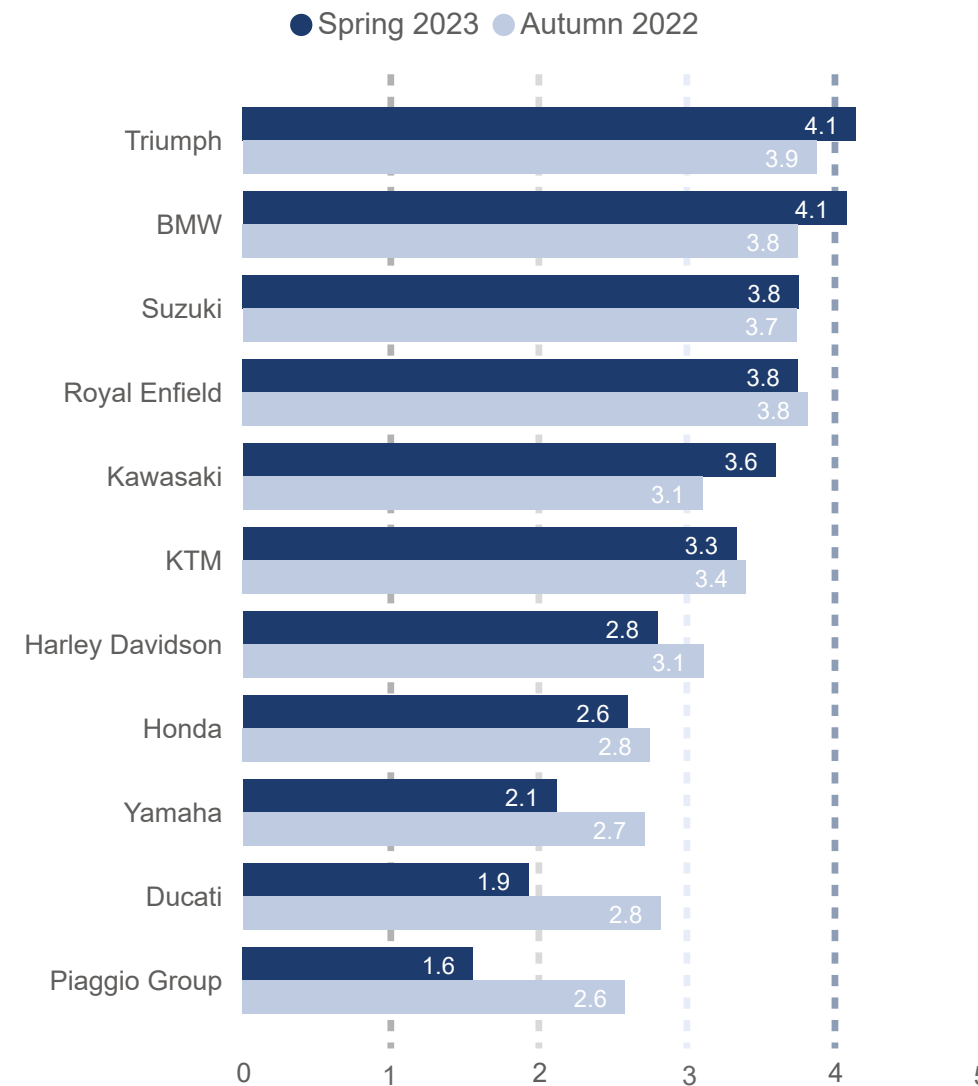
Spring 2023



Autumn 2022



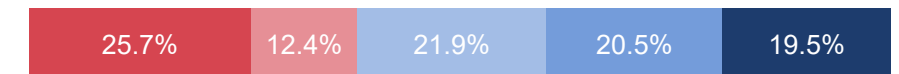
Spring 2023 vs Autumn 2022 Average Score



Spread of Responses

● 1 ● 2 ● 3 ● 4 ● 5

Spring 2023



Autumn 2022



Top 3

Triumph

4.1

BMW

4.1

Suzuki

3.8

Bottom 3

Yamaha

2.1

Ducati

1.9

Piaggio Group

1.6

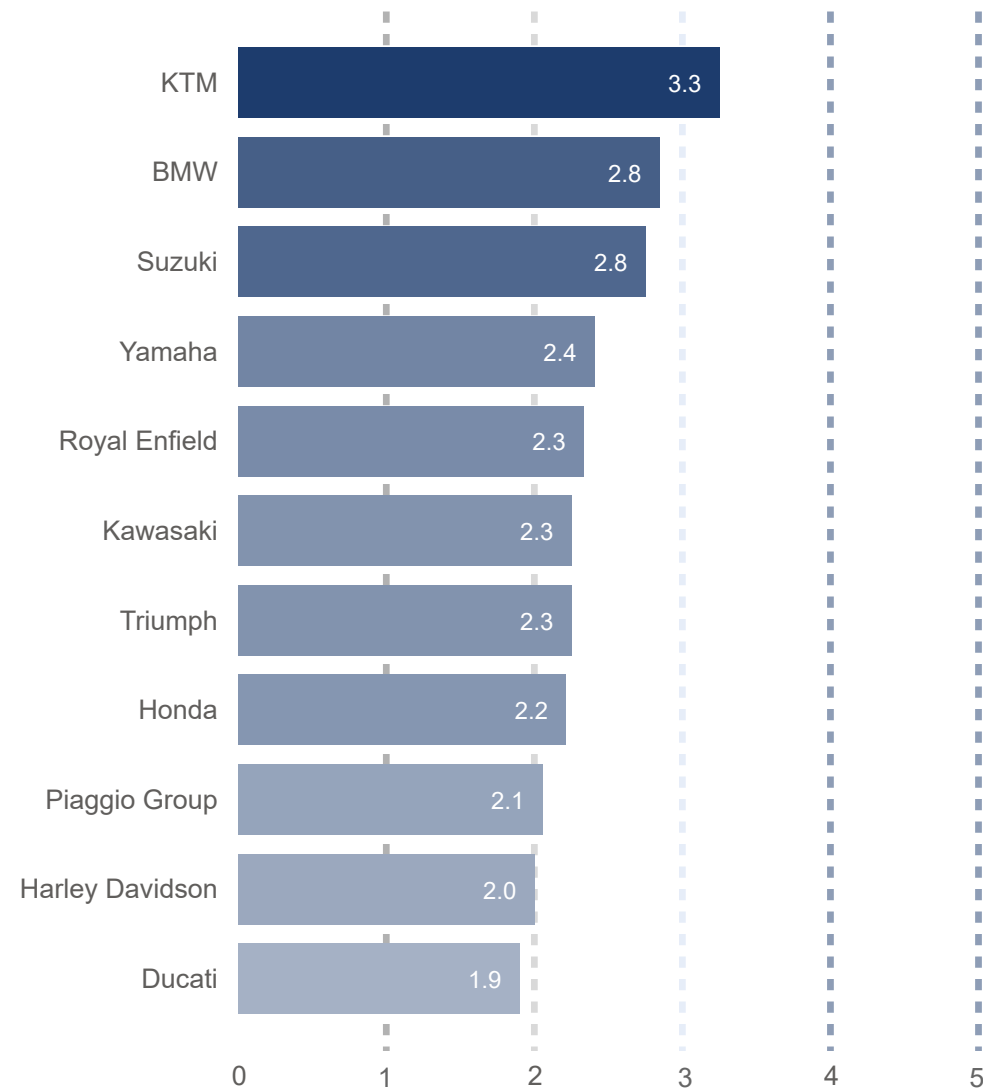
Section E

Electric

Question 21a: The electric products your manufacturer currently offers? (1= Low, 5= High)

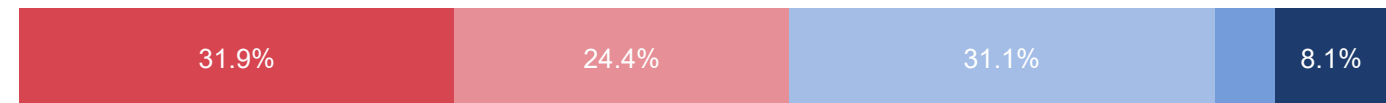
New Question for Spring 2023

Spring 23 Average Score



Spread of Responses

1 2 3 4 5



Spring 23

Top 3

KTM
3.3

BMW
2.8

Suzuki
2.8

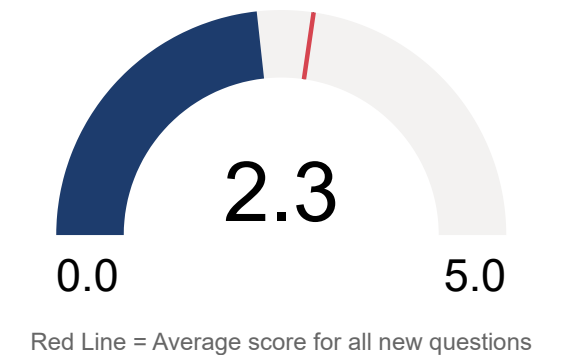
Bottom 3

Piaggio Group
2.1

Harley Davidson
2.0

Ducati
1.9

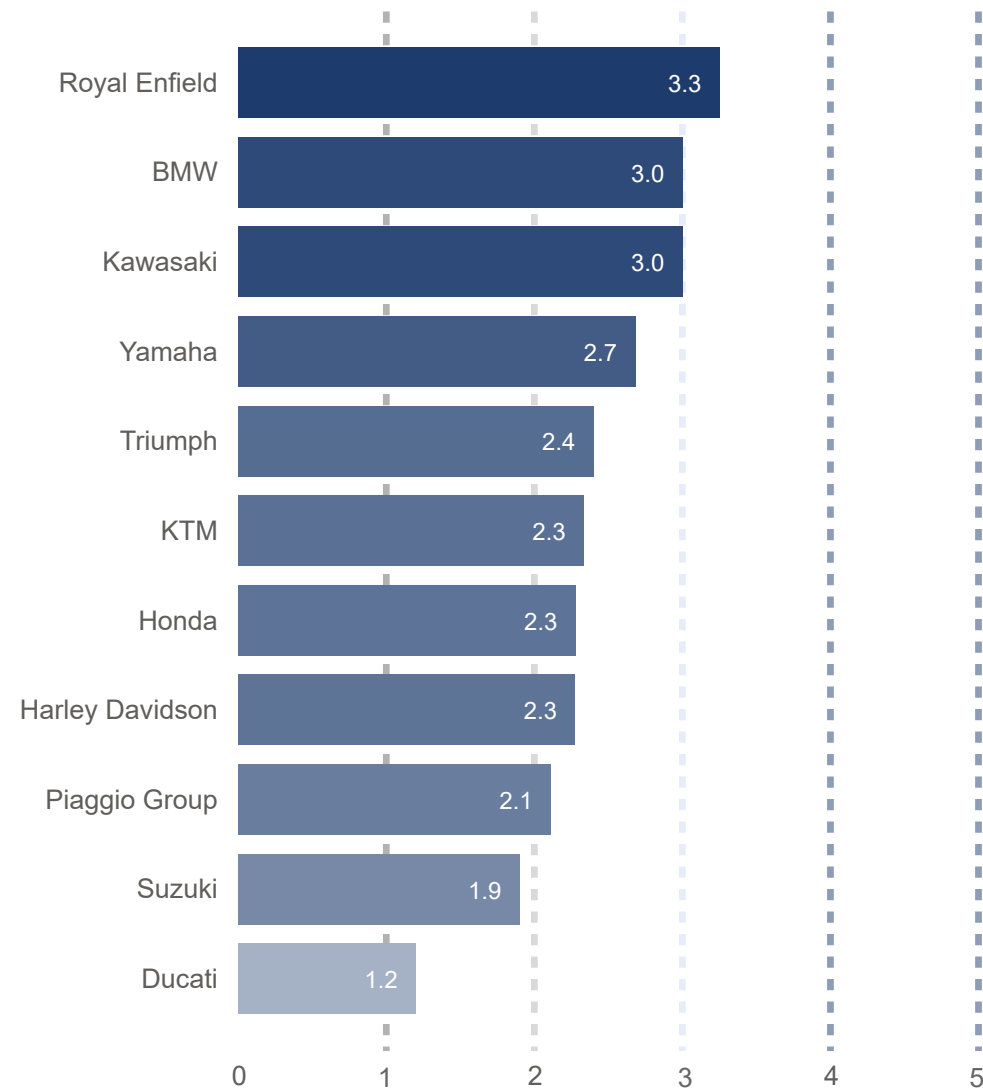
Spring 2023 Overall Average



Question 21b: Your manufacturer's proposed EV/Plug-in product range and the segments they will cover for the next two years? (1= Low, 5= High)

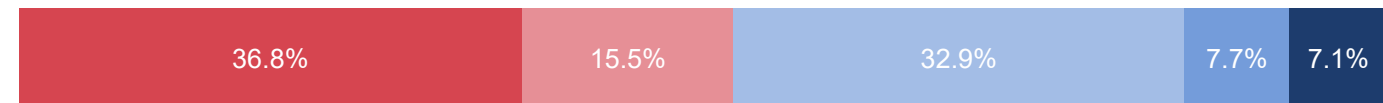
New Question for Spring 2023

Spring 2023 Average Score



Spread of Responses

1 2 3 4 5



Top 3

Royal Enfield

3.3

BMW

3.0

Kawasaki

3.0

Bottom 3

Piaggio Group

2.1

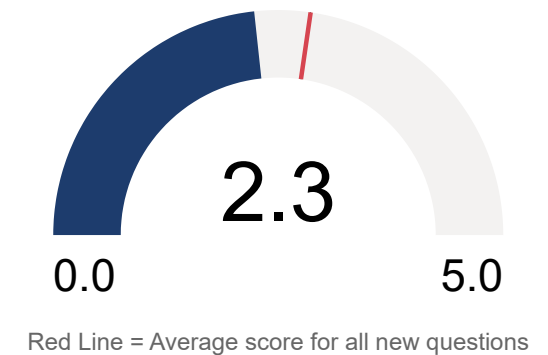
Suzuki

1.9

Ducati

1.2

Spring 2023 Overall Average



Section F

General

Question 23a: The management of your manufacturer takes a dealer's views and opinions into account? (1= Low, 5= High)

Overall Averages

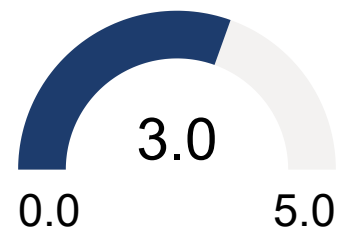
% Change

-6.3%

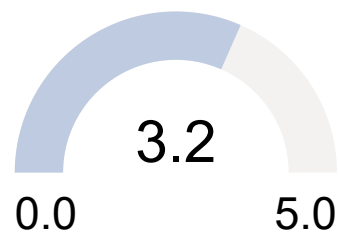
Score Change

-0.2

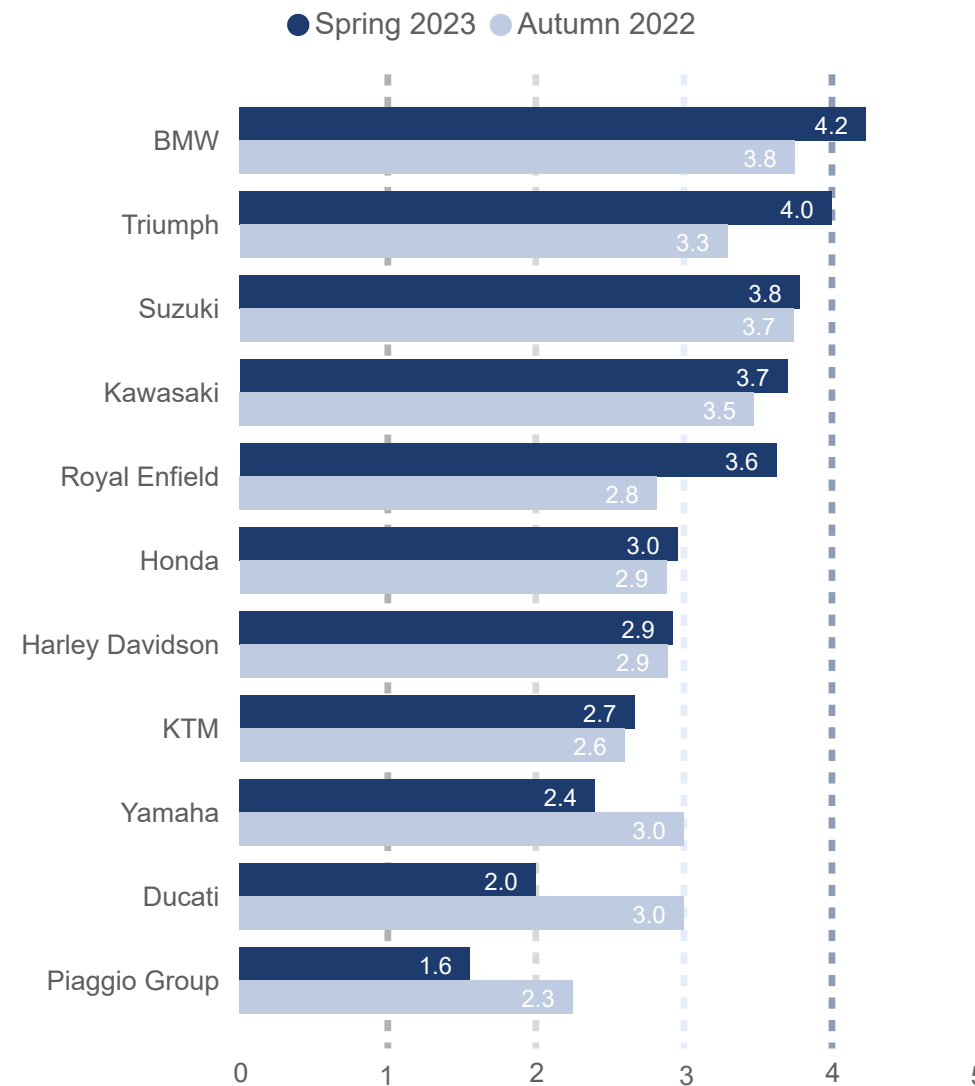
Spring 2023



Autumn 2022



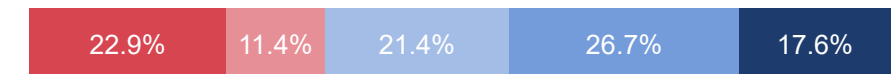
Spring 2023 vs Autumn 2022 Average Score



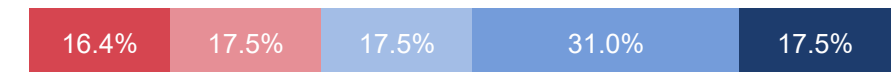
Spread of Responses

● 1 ● 2 ● 3 ● 4 ● 5

Spring 2023



Autumn 2022



Top 3

BMW
4.2
Triumph
4.0
Suzuki
3.8

Bottom 3

Yamaha
2.4
Ducati
2.0
Piaggio Group
1.6

Question 23b: The effectiveness of your manufacturer's retail finance programme? (1= Low, 5= High)

Overall Averages

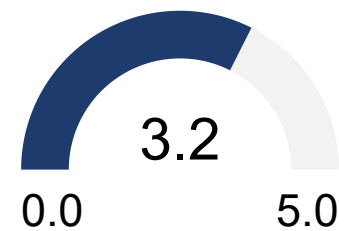
% Change

-5.9%

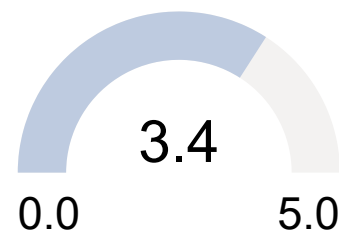
Score Change

-0.2

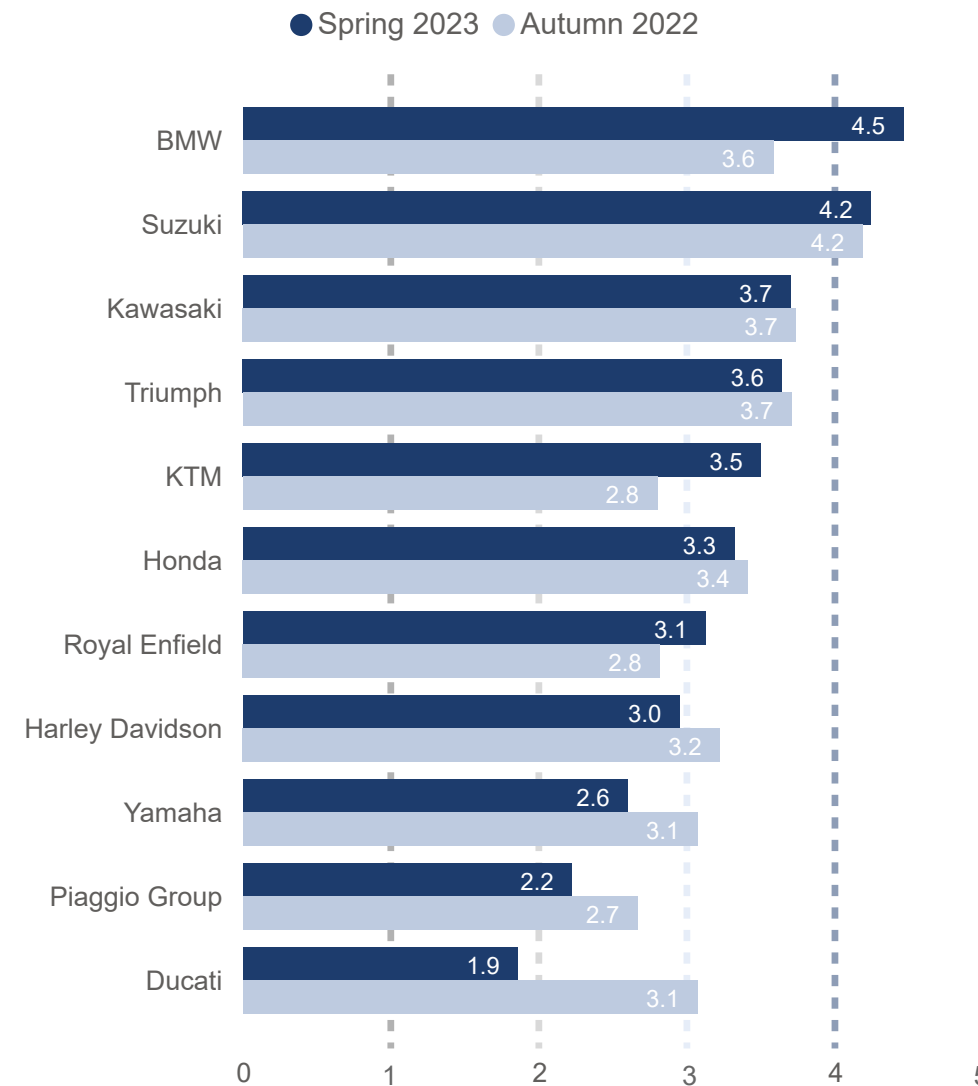
Spring 2023



Autumn 2022



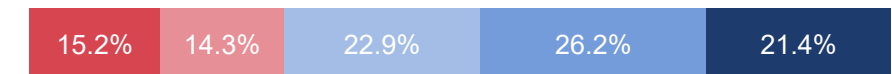
Spring 2023 vs Autumn 2022 Average Score



Spread of Responses

1 2 3 4 5

Spring 2023



Autumn 2022



Top 3

BMW
4.5
Suzuki
4.2
Kawasaki
3.7

Bottom 3

Yamaha
2.6
Piaggio Group
2.2
Ducati
1.9

Question 23c: The effectiveness of your dealer council and dealer forums? (1= Low, 5= High)

Overall Averages

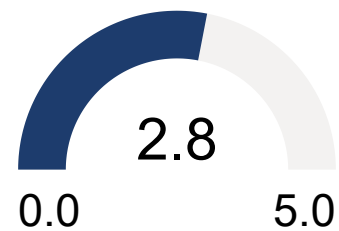
% Change

-3.4%

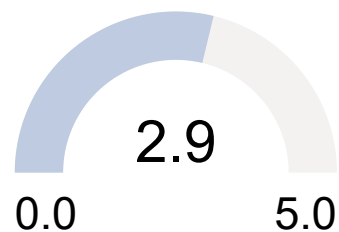
Score Change

-0.1

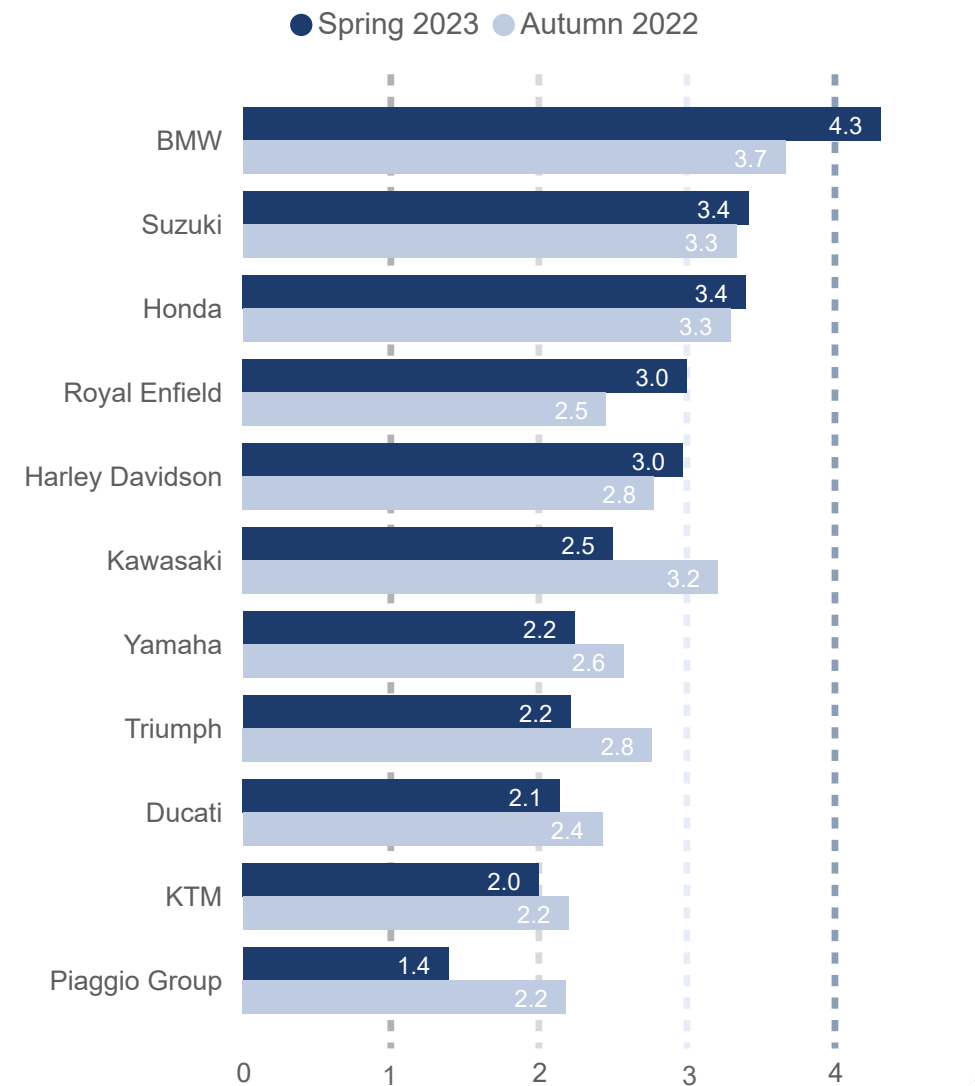
Spring 2023



Autumn 2022



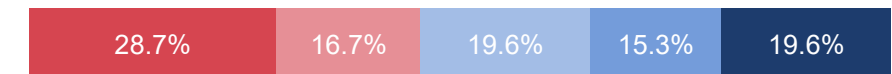
Spring 2023 vs Autumn 2022 Average Score



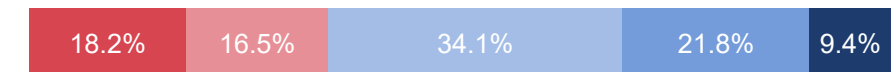
Spread of Responses

● 1 ● 2 ● 3 ● 4 ● 5

Spring 2023



Autumn 2022



Top 3

BMW
4.3

Suzuki
3.4

Honda
3.4

Bottom 3

Ducati
2.1

KTM
2.0

Piaggio Group
1.4

Question 24a: The routine procedures and controls expected (1= Low, 5= High)

Overall Averages

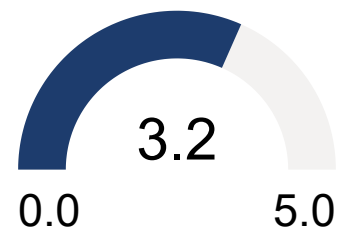
% Change

-8.6%

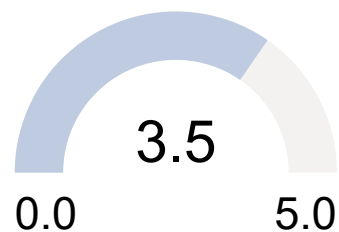
Score Change

-0.3

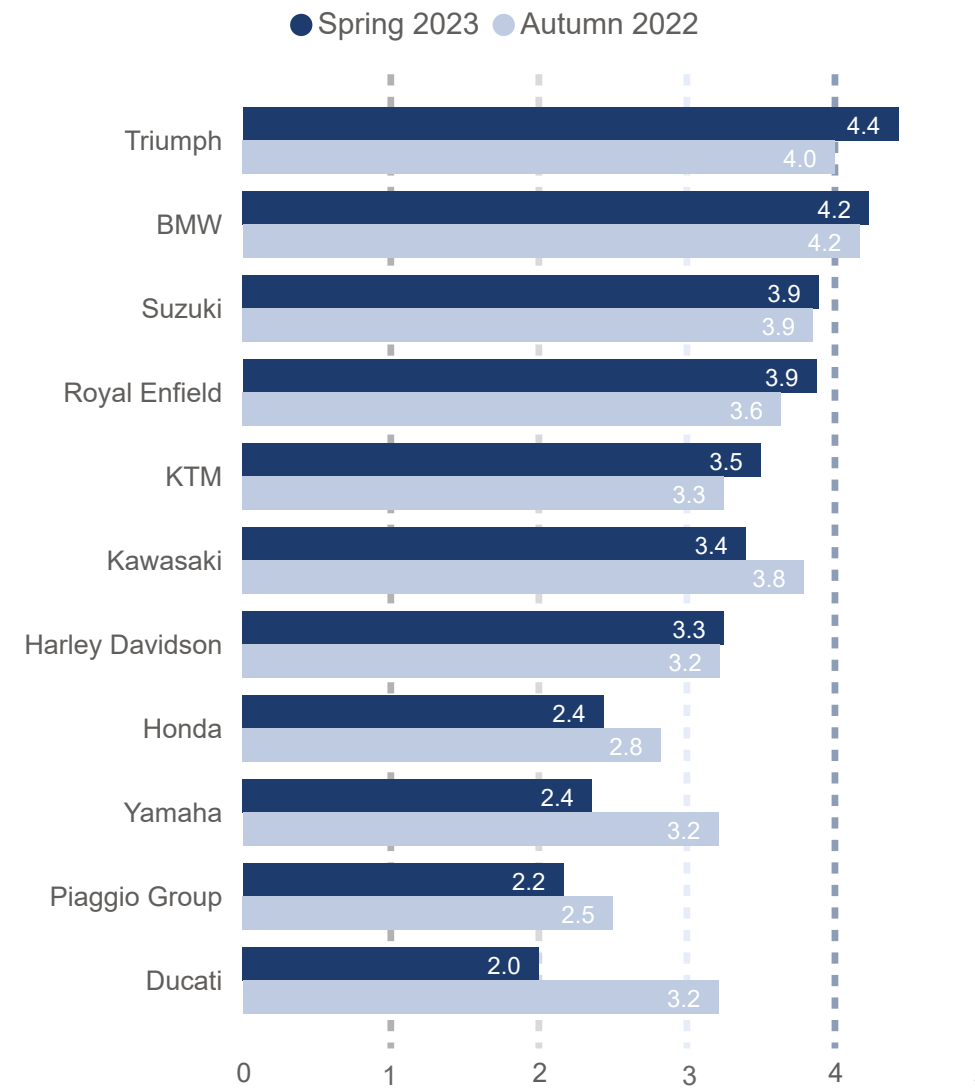
Spring 2023



Autumn 2022



Spring 2023 vs Autumn 2022 Average Score



Spread of Responses

1 2 3 4 5

Spring 2023



Autumn 2022



Top 3

Triumph
4.4
BMW
4.2
Suzuki
3.9

Bottom 3

Yamaha
2.4
Piaggio Group
2.2
Ducati
2.0

Question 24b: The quality of your manufacturer's training (1= Low, 5= High)

Overall Averages

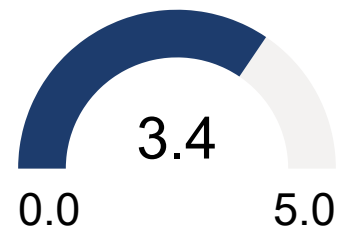
% Change

-8.1%

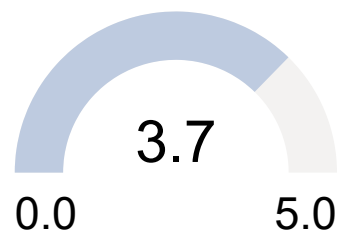
Score Change

-0.3

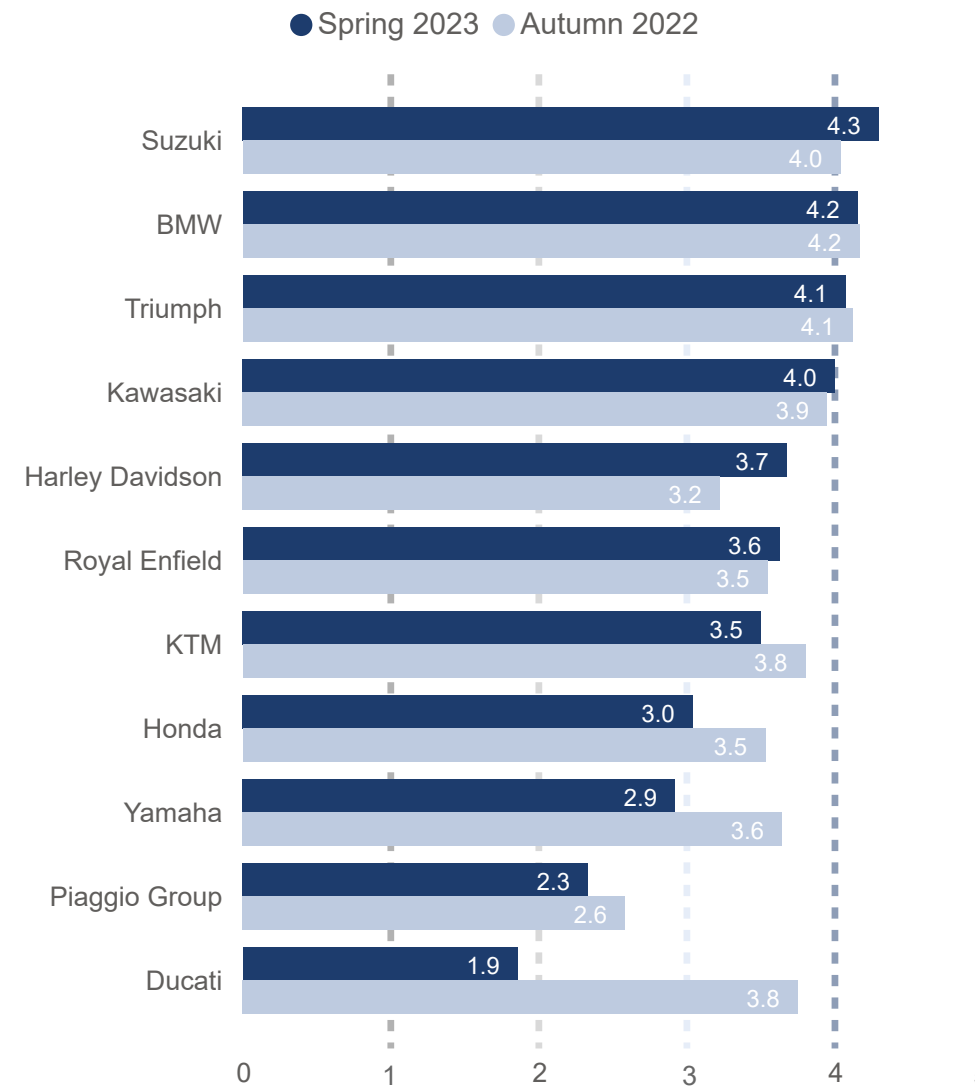
Spring 2023



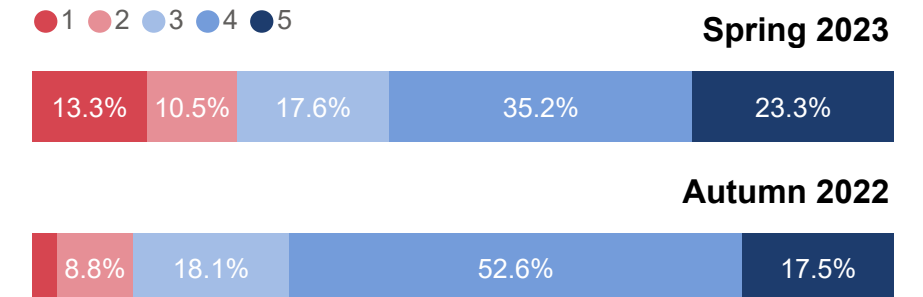
Autumn 2022



Spring 2023 vs Autumn 2022 Average Score



Spread of Responses



Top 3

Suzuki
4.3

BMW
4.2

Triumph
4.1

Bottom 3

Yamaha
2.9

Piaggio Group
2.3

Ducati
1.9

Question 24c: The cost of your manufacturer's training (1= Low, 5= High)

Overall Averages

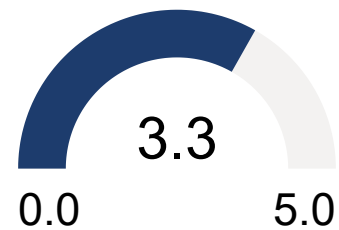
% Change

-8.3%

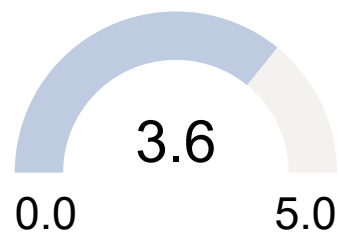
Score Change

-0.3

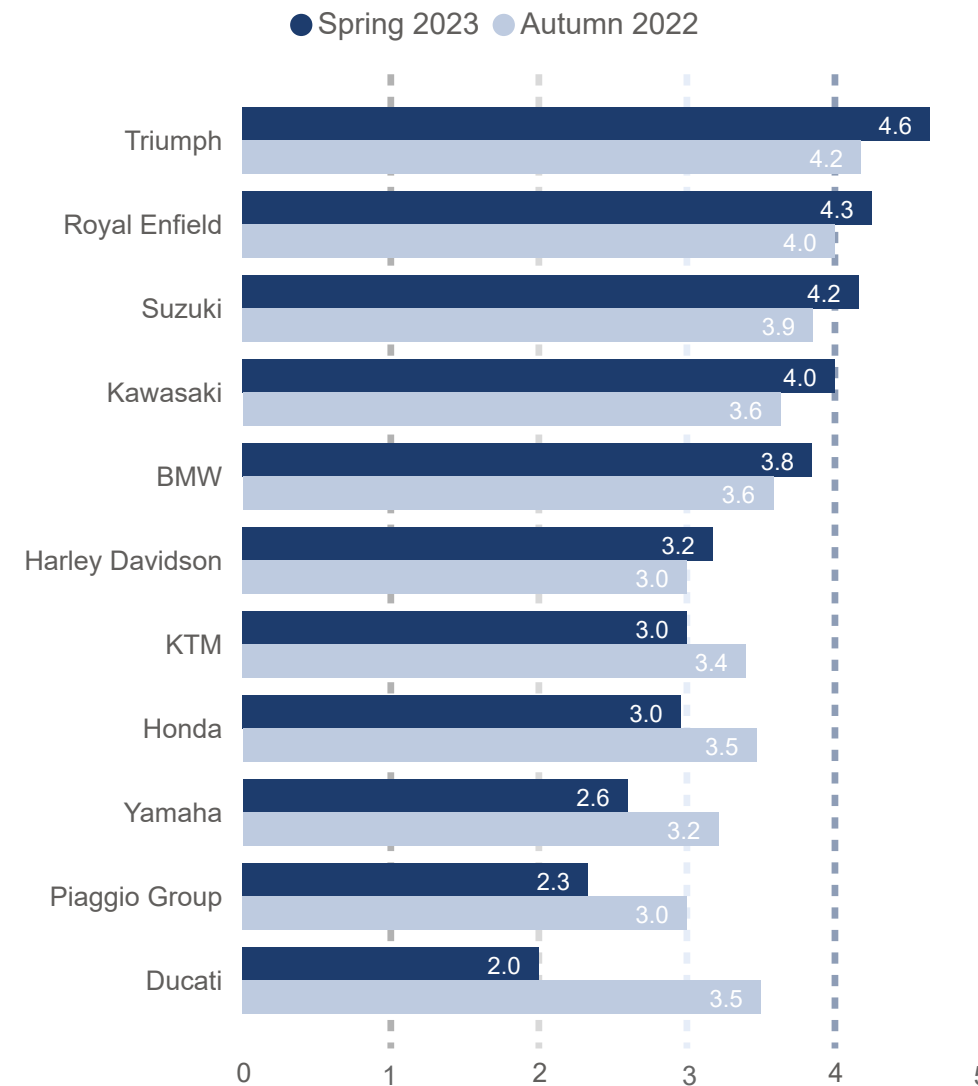
Spring 2023



Autumn 2022



Spring 2023 vs Autumn 2022 Average Score



Spread of Responses

1 2 3 4 5

Spring 2023



Autumn 2022



Top 3

Triumph

4.6

Royal Enfield

4.3

Suzuki

4.2

Bottom 3

Yamaha

2.6

Piaggio Group

2.3

Ducati

2.0

Question 24d: Your ability to do business easily with your manufacturer on a day-to-day basis (1= Low, 5= High)

Overall Averages

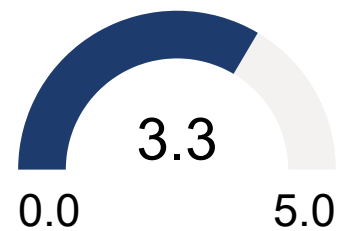
% Change

-8.3%

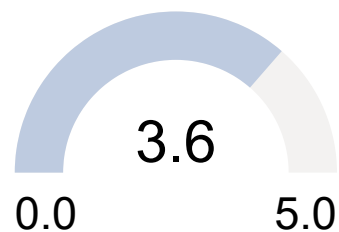
Score Change

-0.3

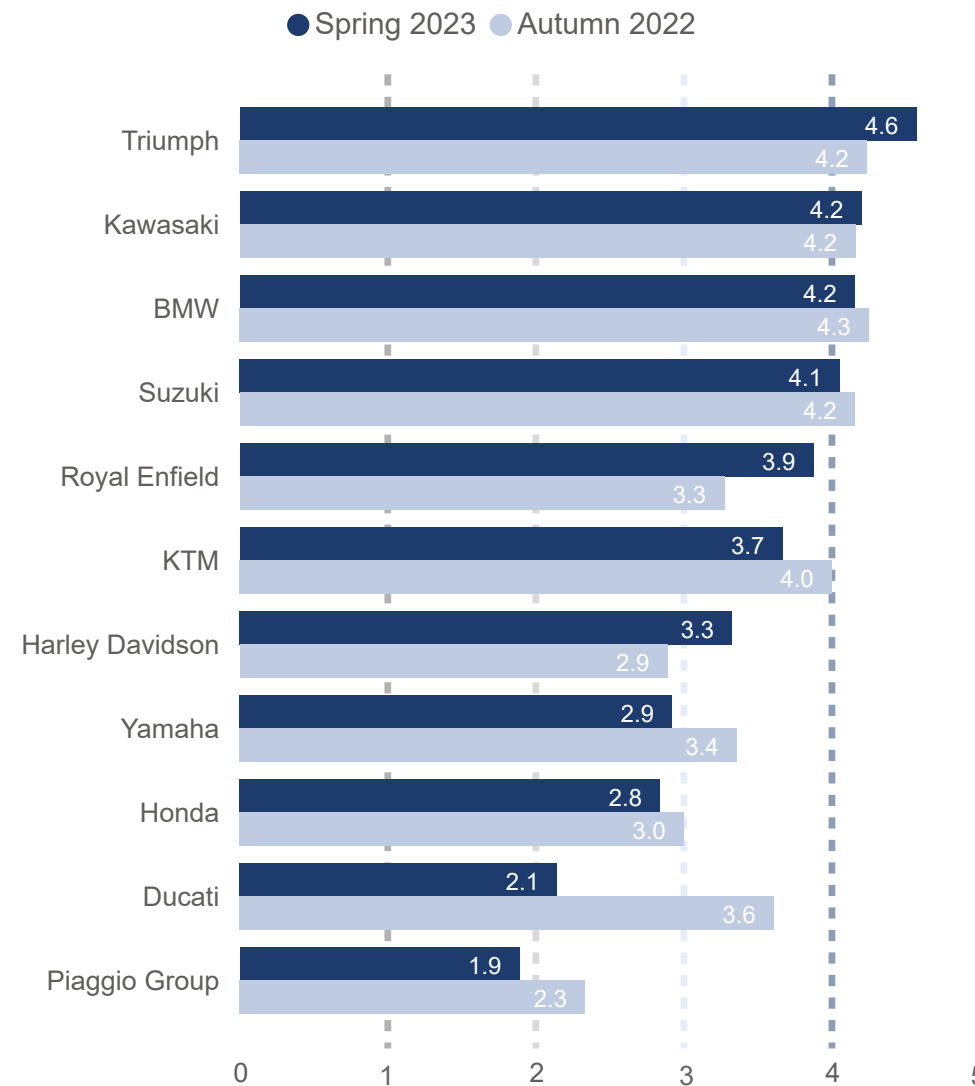
Spring 2023



Autumn 2022



Spring 2023 vs Autumn 2022 Average Score



Spread of Responses

● 1 ● 2 ● 3 ● 4 ● 5

Spring 2023



Autumn 2022



Top 3

Triumph
4.6

Kawasaki
4.2

BMW
4.2

Bottom 3

Honda
2.8

Ducati
2.1

Piaggio Group
1.9

Question 24e: The support and assistance provided by your manufacturer enable you to follow a professional sales process (1= Low, 5= High)

Overall Averages

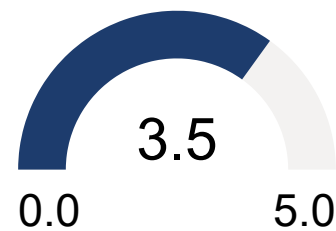
% Change

-5.4%

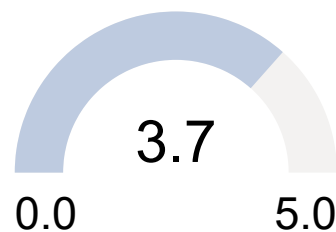
Score Change

-0.2

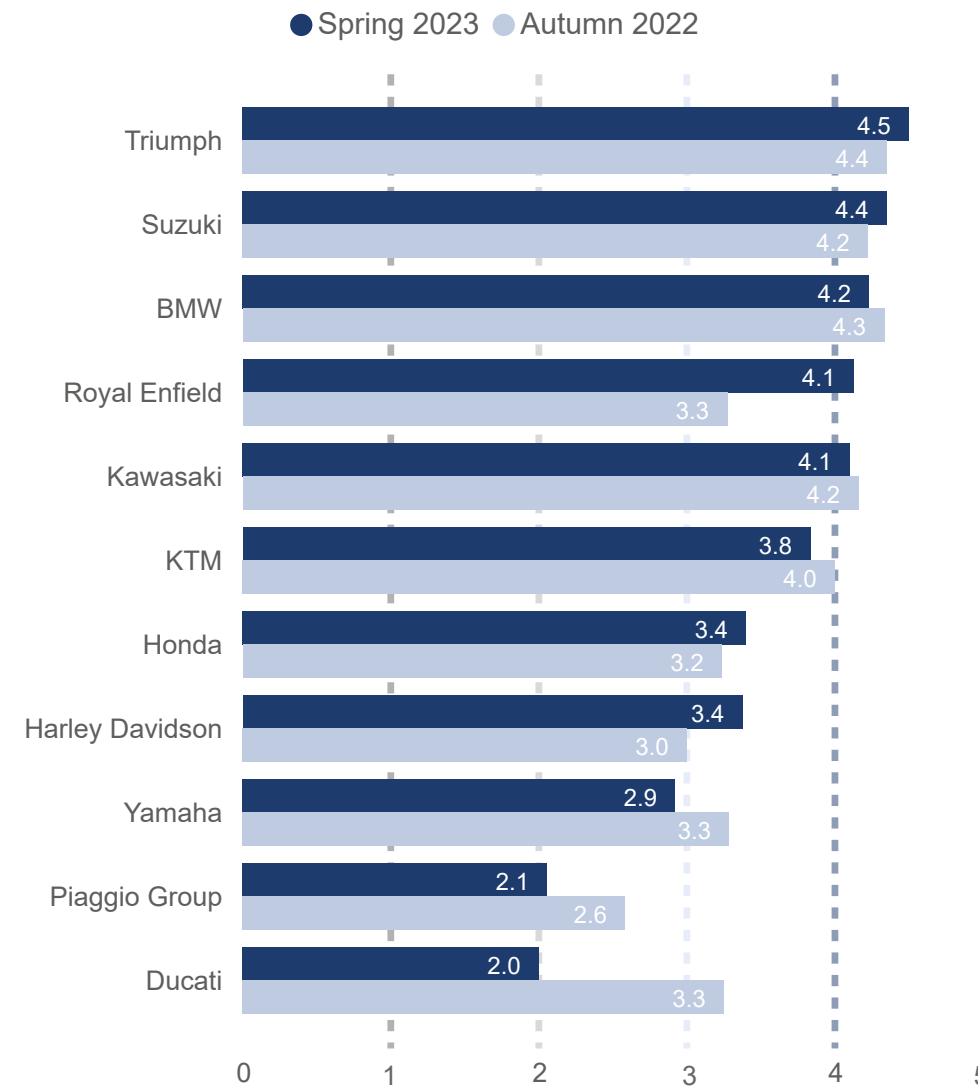
Spring 2023



Autumn 2022



Spring 2023 vs Autumn 2022 Average Score



Spread of Responses

1 2 3 4 5

Spring 2023



Autumn 2022



Top 3

Triumph
4.5
Suzuki
4.4
BMW
4.2

Bottom 3

Yamaha
2.9
Piaggio Group
2.1
Ducati
2.0

Question 25: Overall, how do you rate the value of holding your motorcycle franchise? (1= Low, 10= High)

Overall Averages

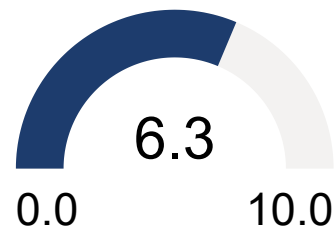
% Change

-16.0%

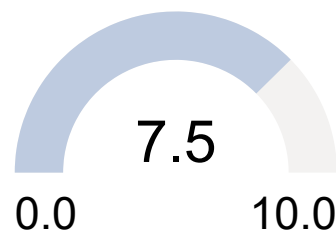
Score Change

-1.2

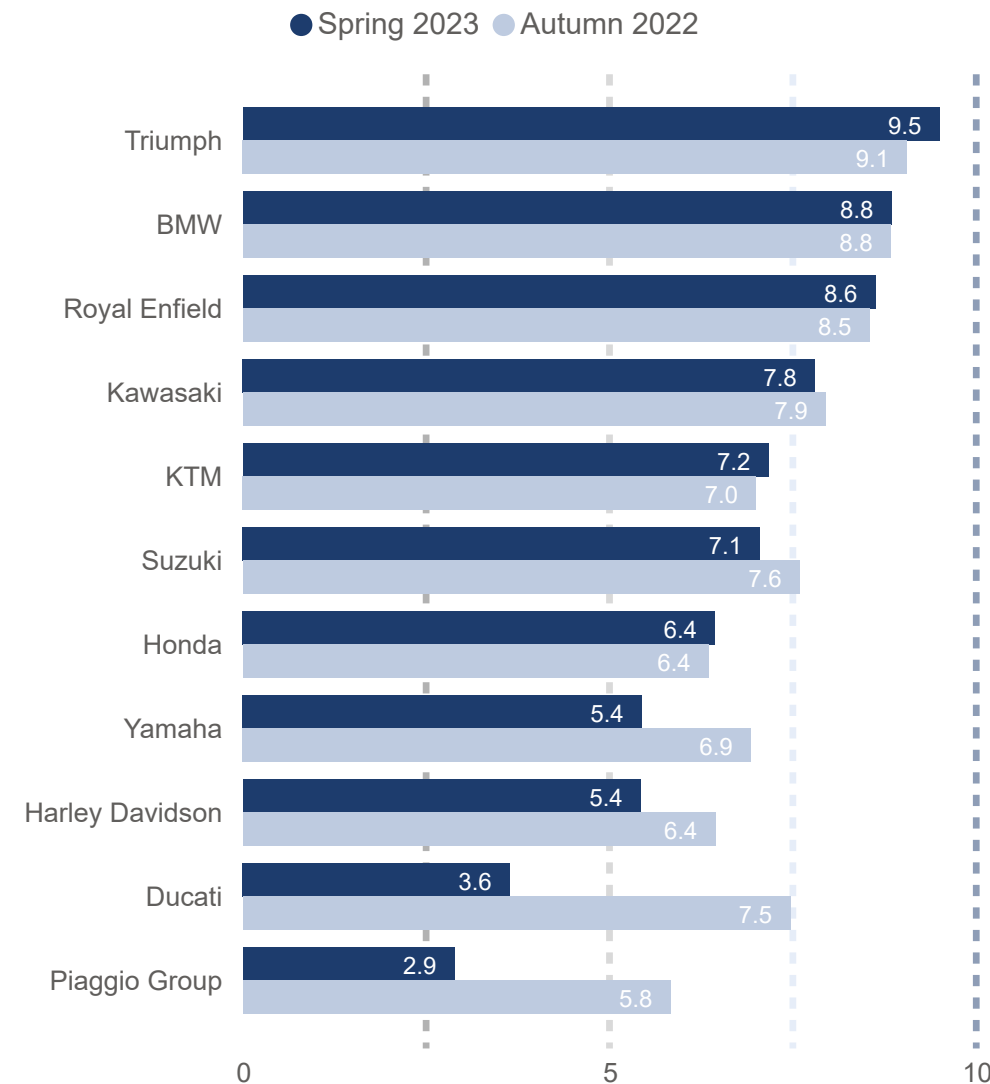
Spring 2023



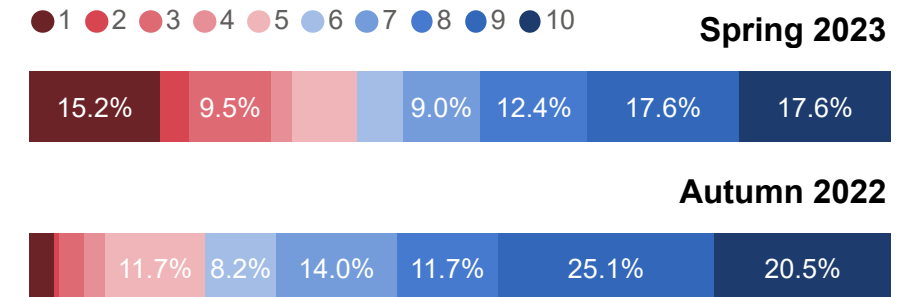
Autumn 2022



Spring 2023 vs Autumn 2022 Average Score



Spread of Responses



Top 3 Bottom 3 by Score

| | | | |
|---------------|-----------------|---------|---------------|
| Triumph | Harley Davidson | Triumph | Yamaha |
| 9.5 | 5.4 | 4.9% | -21.5% |
| BMW | Ducati | KTM | Piaggio Group |
| 8.8 | 3.6 | 2.4% | -50.5% |
| Royal Enfield | Piaggio Group | Honda | Ducati |
| 8.6 | 2.9 | 1.4% | -51.2% |

12 MONTH COMPARISON

Question 25: Overall, how do you rate the value of holding your motorcycle franchise? (1= Low, 10= High)

Overall Averages

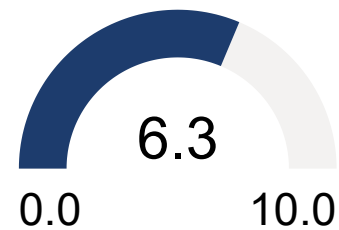
% Change

5%

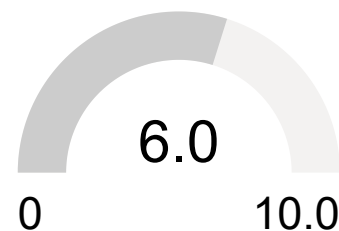
Score Change

0.3

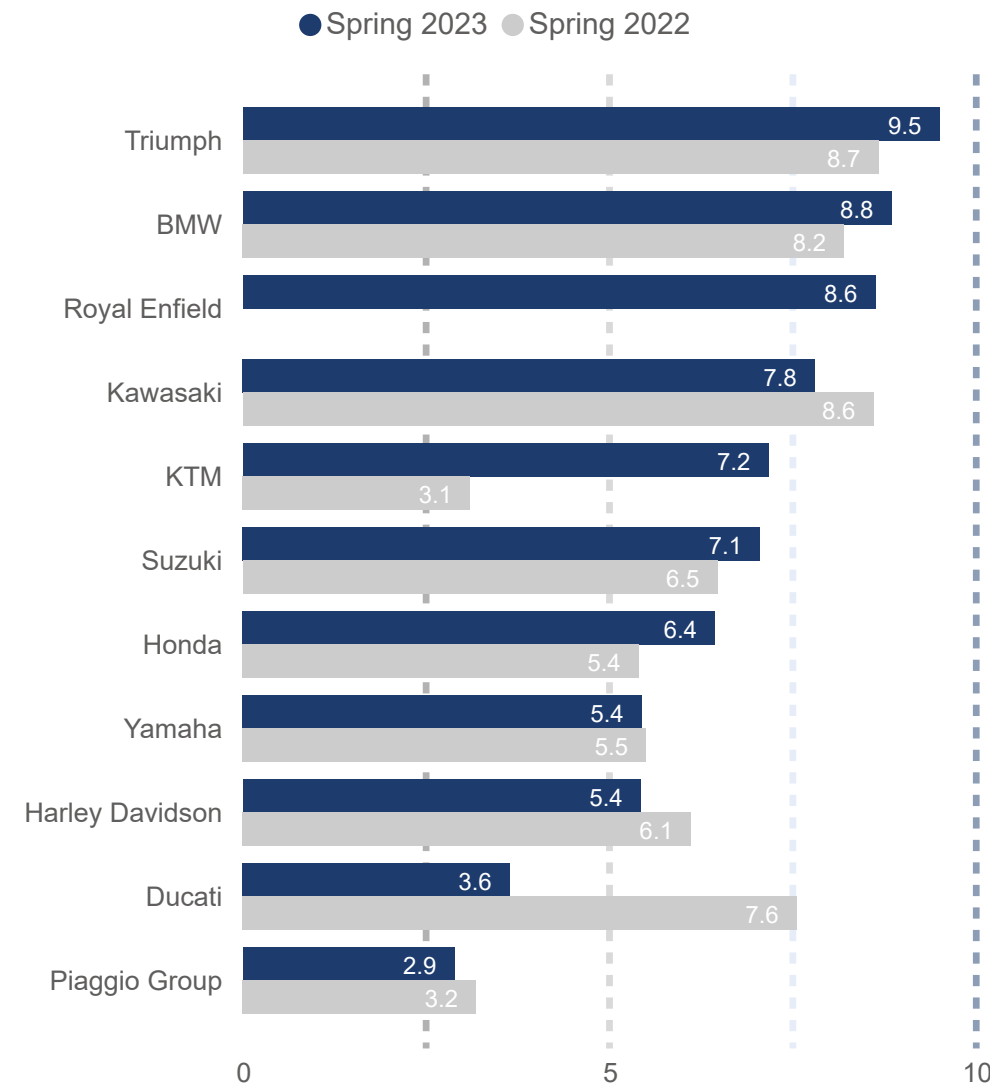
Spring 2023



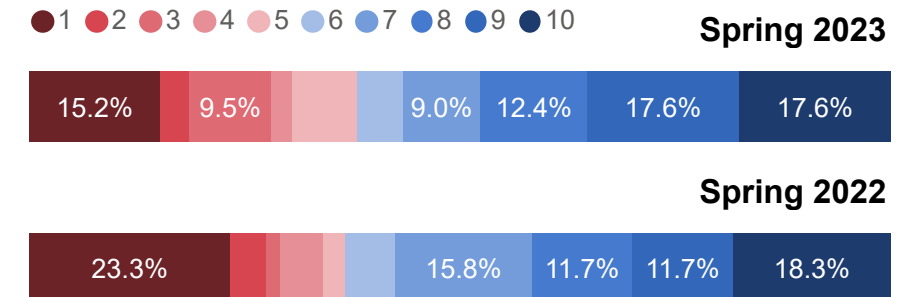
Spring 2022



Spring 2023 vs Spring 2022 Average Score



Spread of Responses



Top 3 Bottom 3 by Score

| | | | |
|---------------|-----------------|---------|-----------------|
| Triumph | Harley Davidson | KTM | Kawasaki |
| 9.5 | 5.4 | 131.2% | -9.3% |
| BMW | Ducati | Honda | Harley Davidson |
| 8.8 | 3.6 | 19.3% | -11.2% |
| Royal Enfield | Piaggio Group | Triumph | Ducati |
| 8.6 | 2.9 | 9.6% | -51.8% |

Section G

Manufacturer

Summaries

BMW Brand Performance

How do you rate the value of holding your motorcycle franchise?

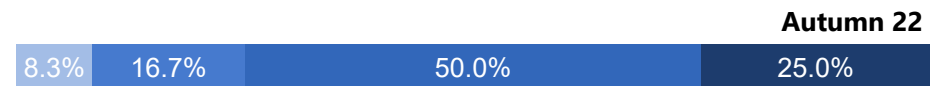
% Response Rate
30%

+-% Change
0.1%

Spring 23
8.8

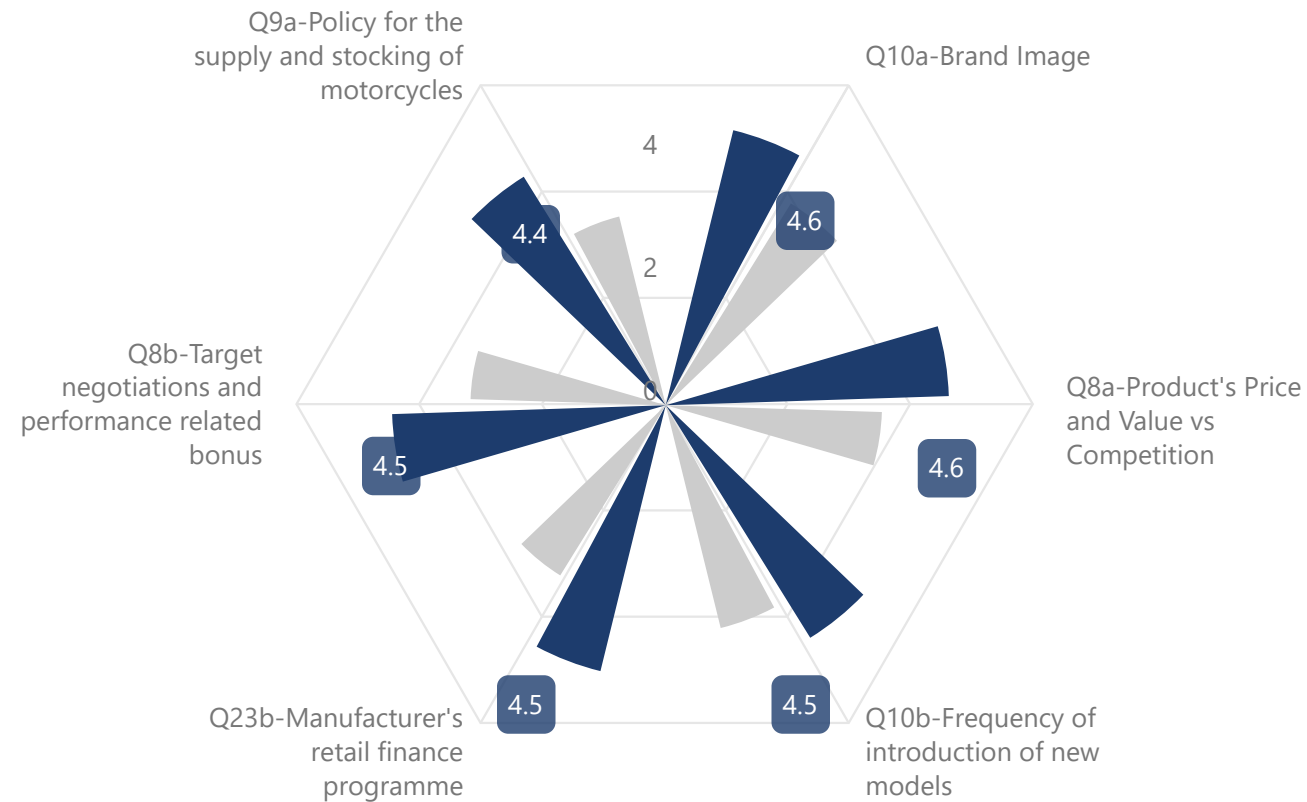
Autumn 22
8.8

● 1 ● 2 ● 3 ● 4 ● 5 ● 6 ● 7 ● 8 ● 9 ● 10

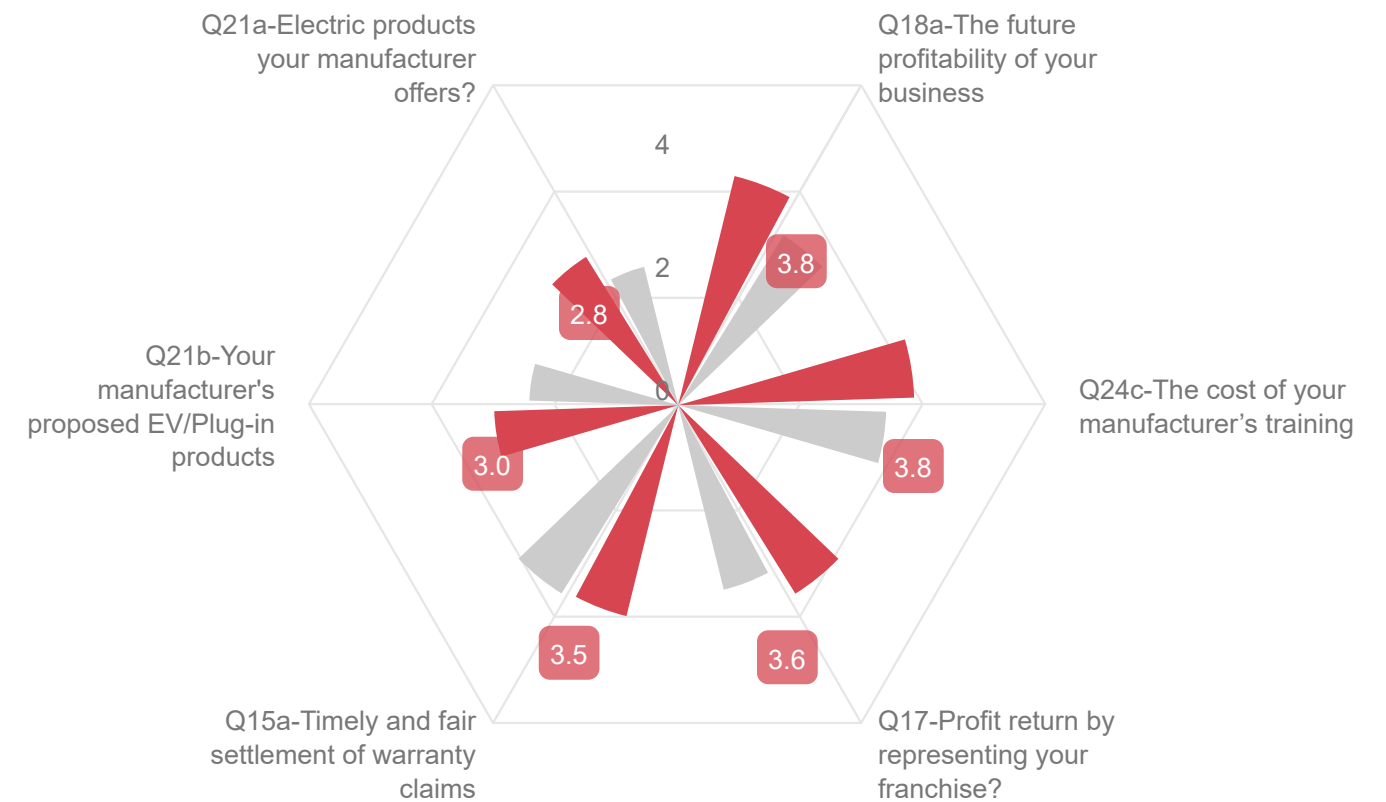


Top 6 Questions vs Average

Brand 2023 ● Average 2023 ●



Bottom 6 Questions vs Average



Ducati Brand Performance

How do you rate the value of holding your motorcycle franchise?

% Response Rate

47%

+-% Change

-51.2%

Spring 23

3.6

Autumn 22

7.5

● 1 ● 2 ● 3 ● 4 ● 5 ● 6 ● 7 ● 8 ● 9 ● 10

Spring 23

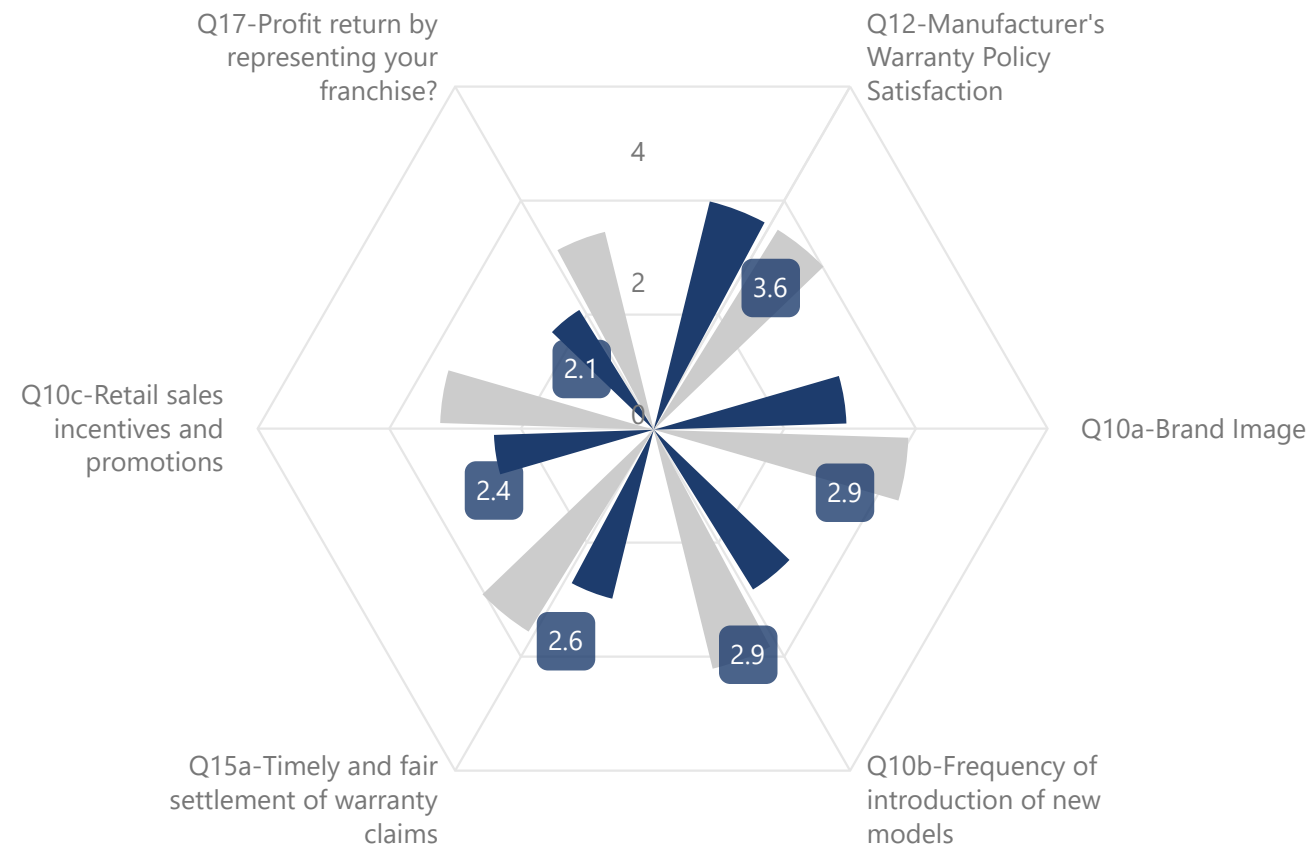
64.3% 21.4% 14.3%

Autumn 22

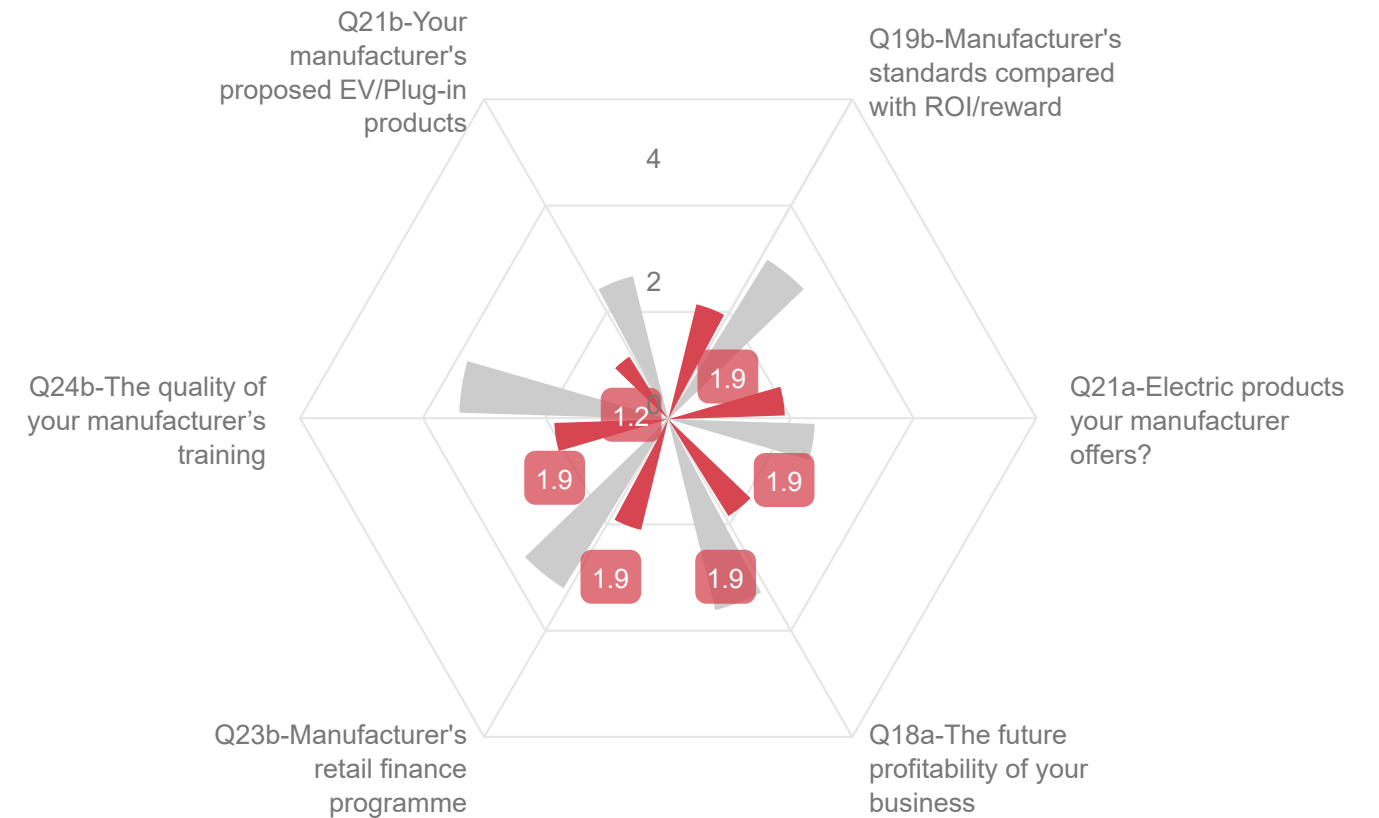
28.6% 21.4% 39.3%

Top 6 Questions vs Average

Brand 2023 ● Average 2023 ●



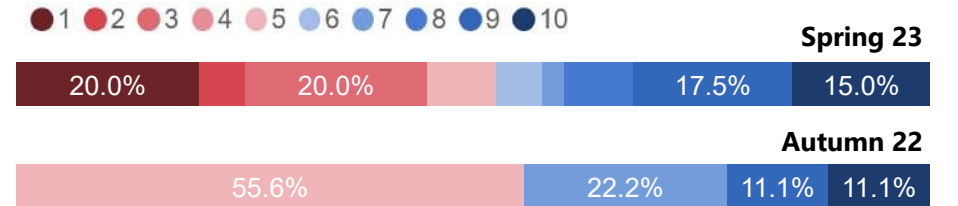
Bottom 6 Questions vs Average



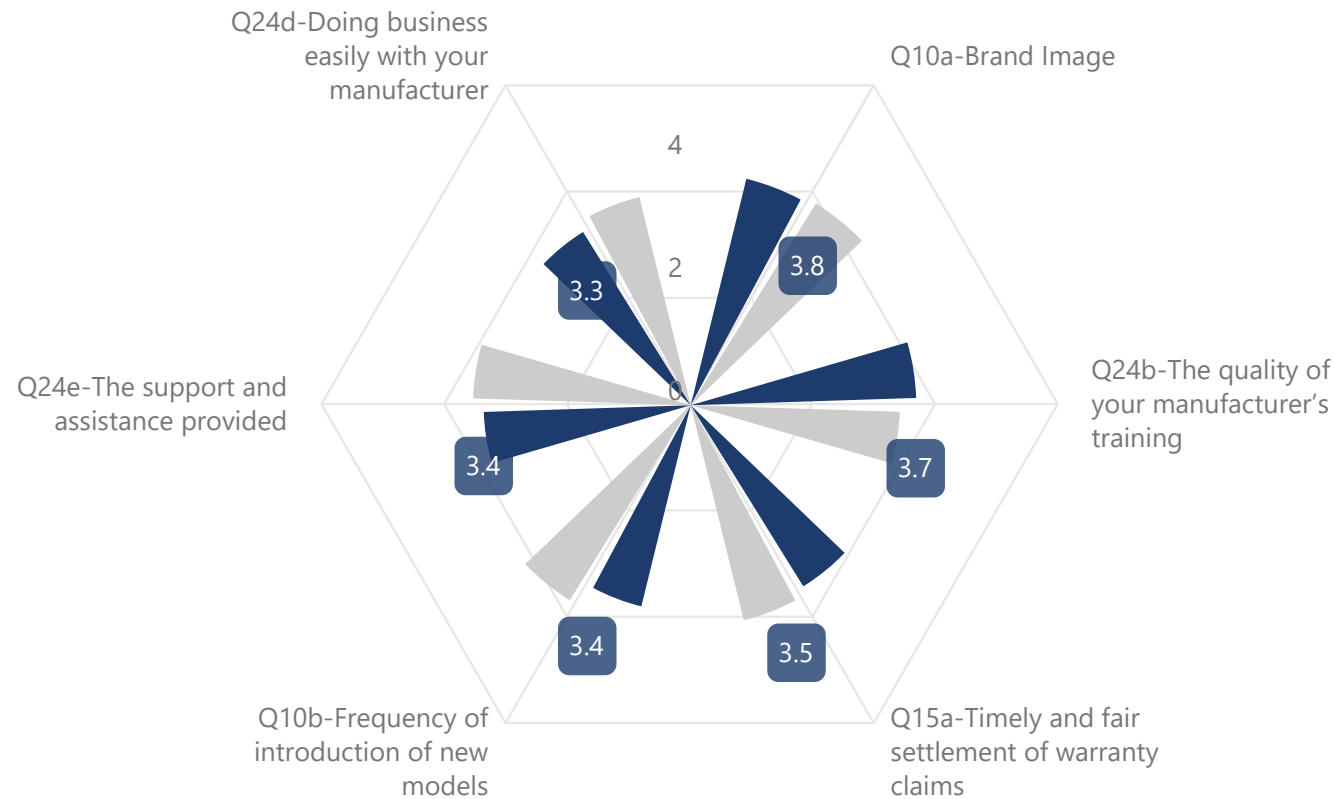
Harley Davidson Brand Performance

How do you rate the value of holding your motorcycle franchise?

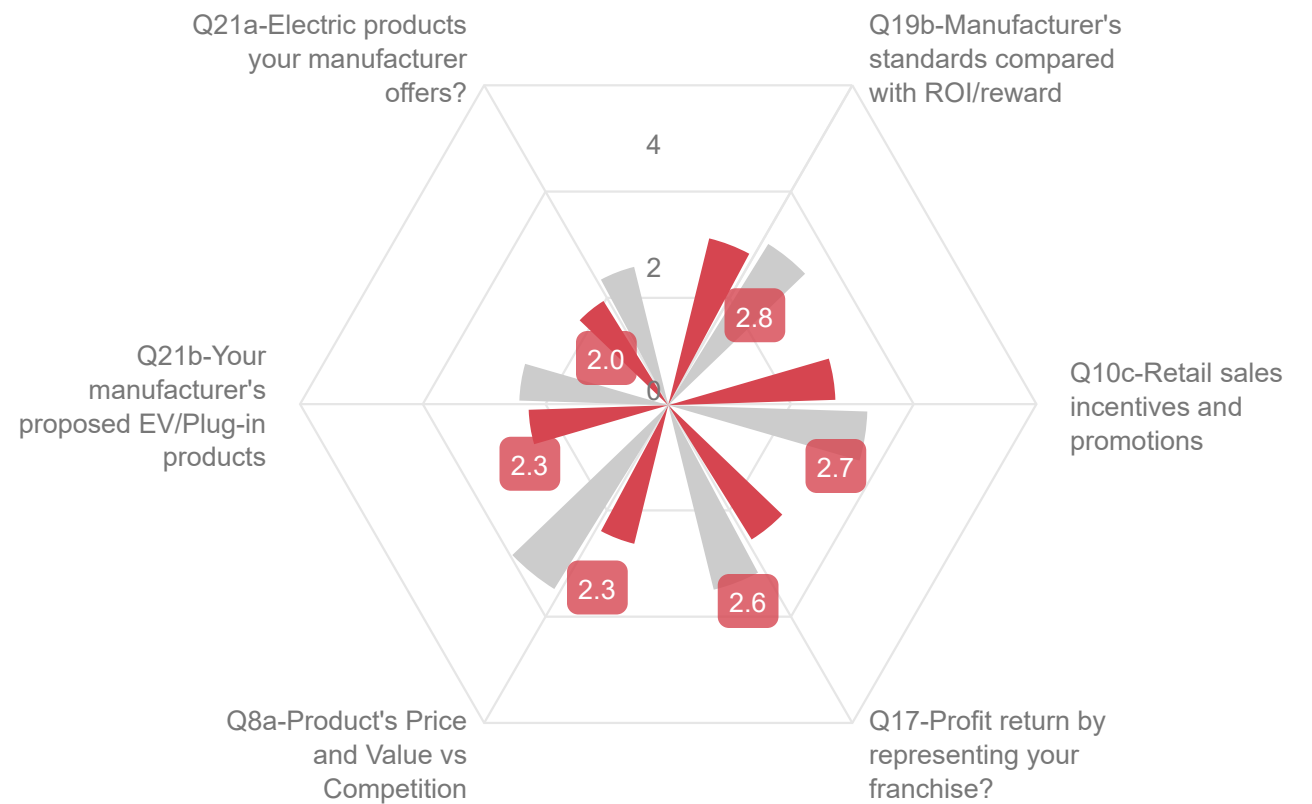
% Response Rate **94%** +/- % Change **-15.8%** Spring 23 **5.4** Autumn 22 **6.4**



Top 6 Questions vs Average



Bottom 6 Questions vs Average



Honda Brand Performance

How do you rate the value of holding your motorcycle franchise?

% Response Rate

53%

+-% Change

1.4%

Spring 23

6.4

Autumn 22

6.4

● 1 ● 2 ● 3 ● 4 ● 5 ● 6 ● 7 ● 8 ● 9 ● 10

8.0% 12.0% 8.0% 8.0% 12.0% 8.0% 20.0% 24.0%

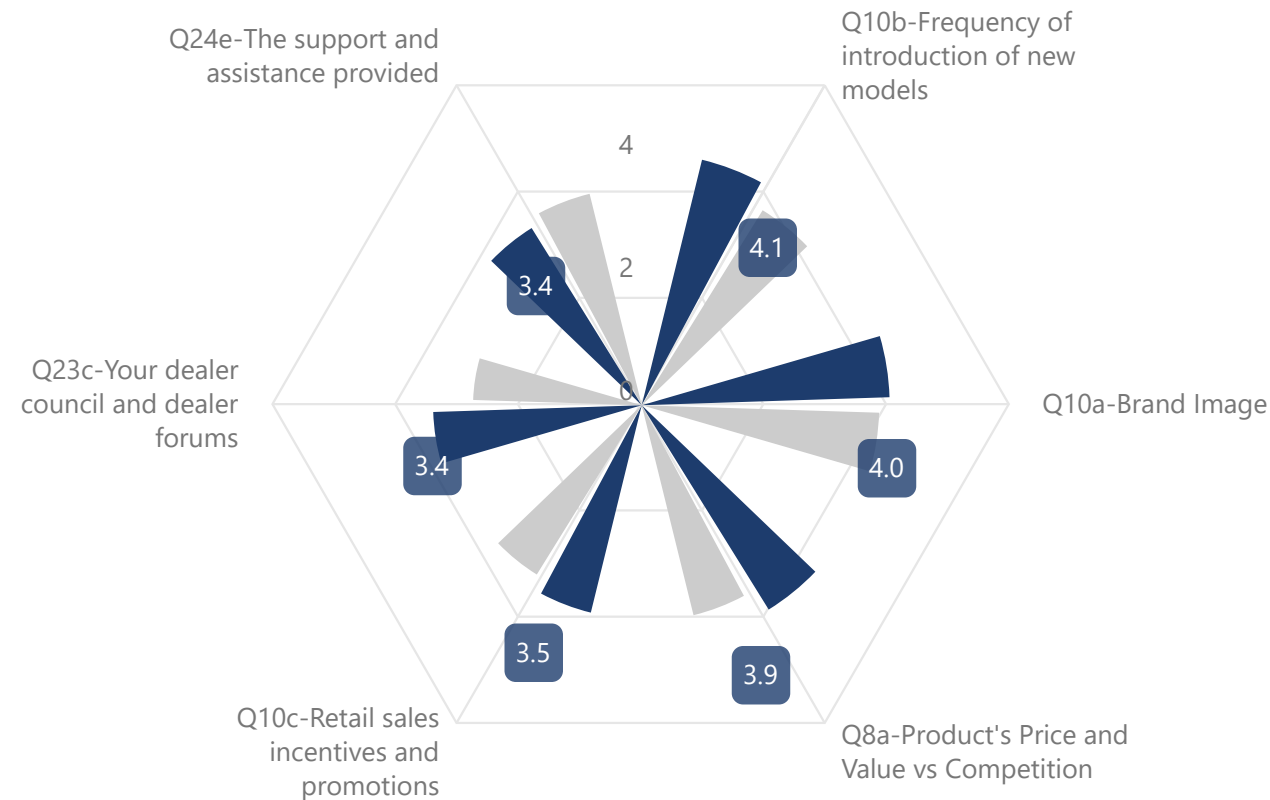
Spring 23

11.8% 11.8% 11.8% 11.8% 29.4%

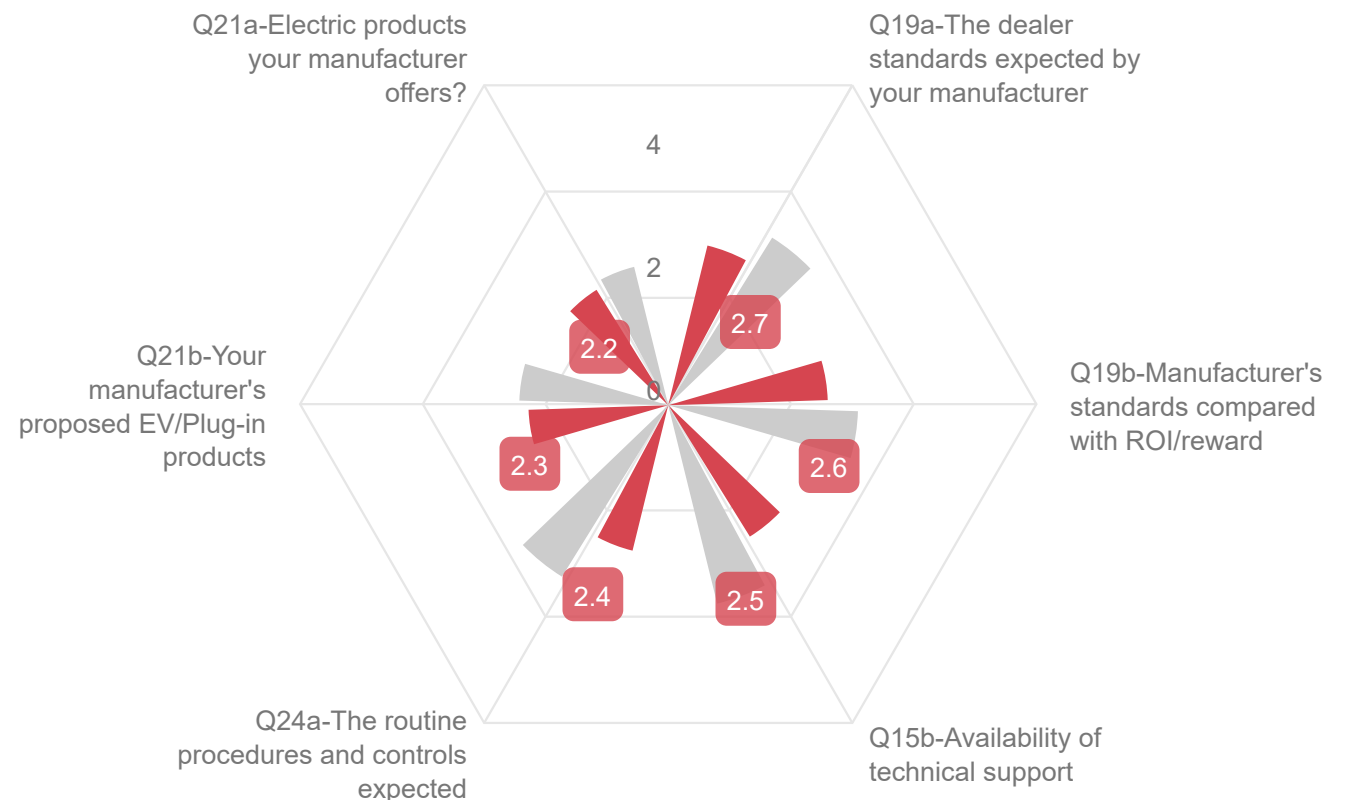
Autumn 22

Top 6 Questions vs Average

Brand 2023 ● Average 2023 ●



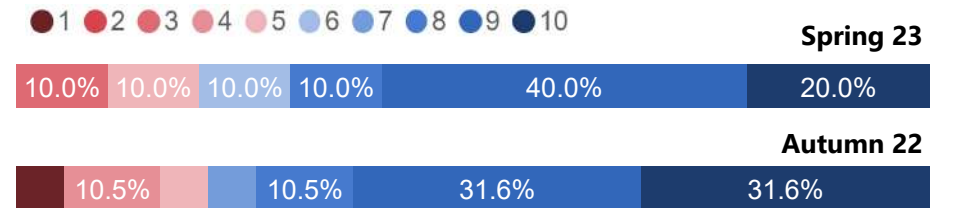
Bottom 6 Questions vs Average



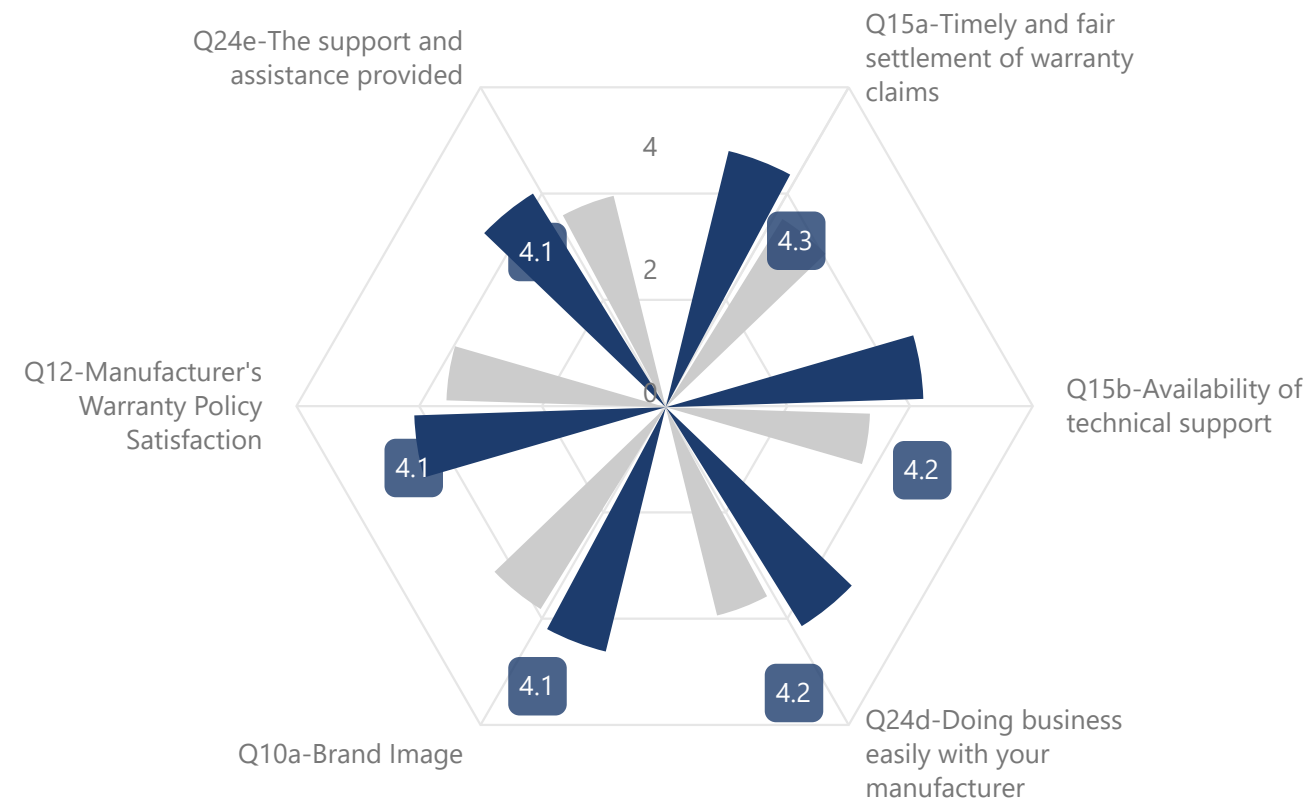
Kawasaki Brand Performance

How do you rate the value of holding your motorcycle franchise?

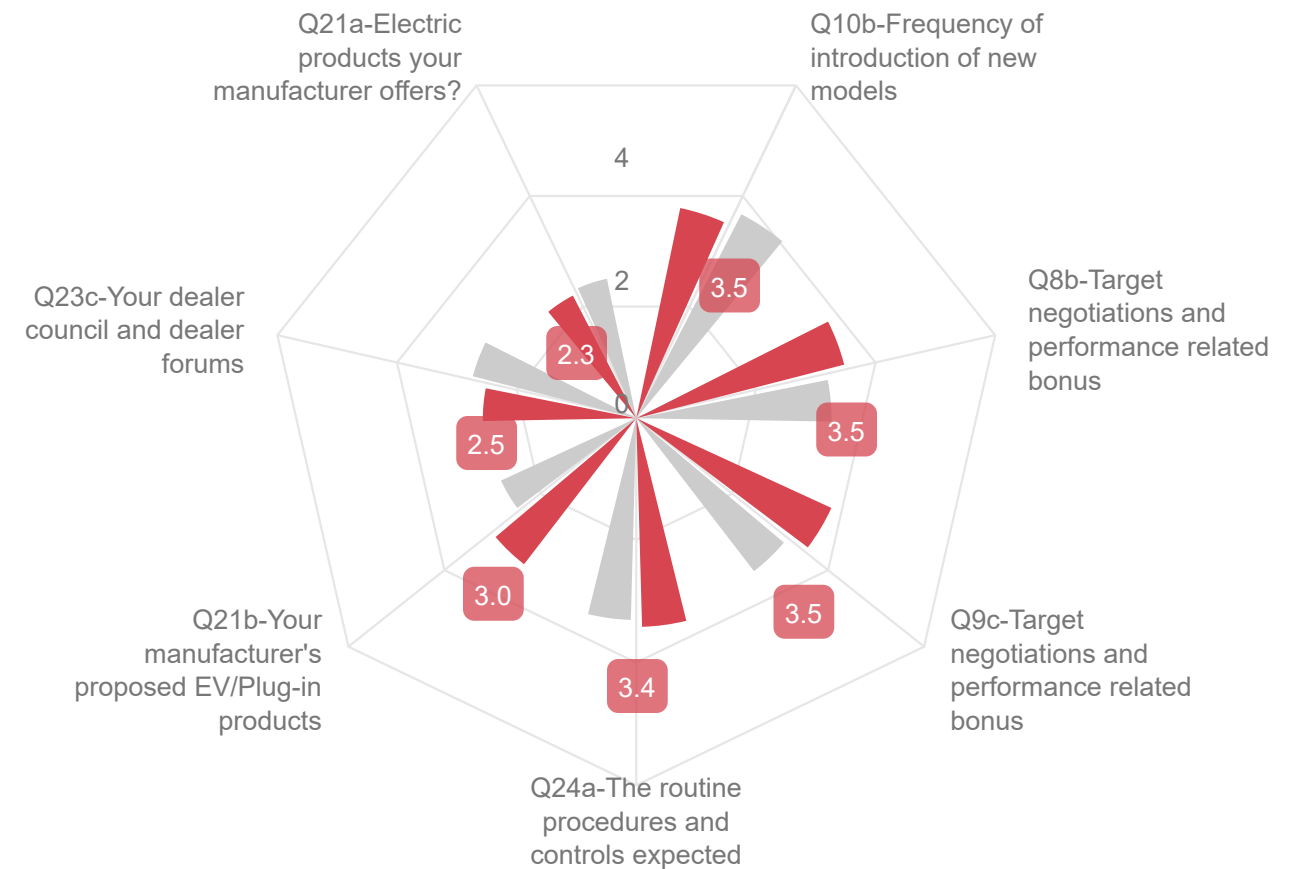
| % Response Rate | +-% Change | Spring 23 | Autumn 22 |
|-----------------|--------------|------------|------------|
| 18% | -1.9% | 7.8 | 7.9 |



Top 6 Questions vs Average



Bottom 6 Questions vs Average



KTM Brand Performance

How do you rate the value of holding your motorcycle franchise?

% Response Rate

16%

+-% Change

2.4%

Spring 23

7.2

Autumn 22

7.0

● 1 ● 2 ● 3 ● 4 ● 5 ● 6 ● 7 ● 8 ● 9 ● 10

16.7% 16.7% 16.7% 16.7% 33.3%

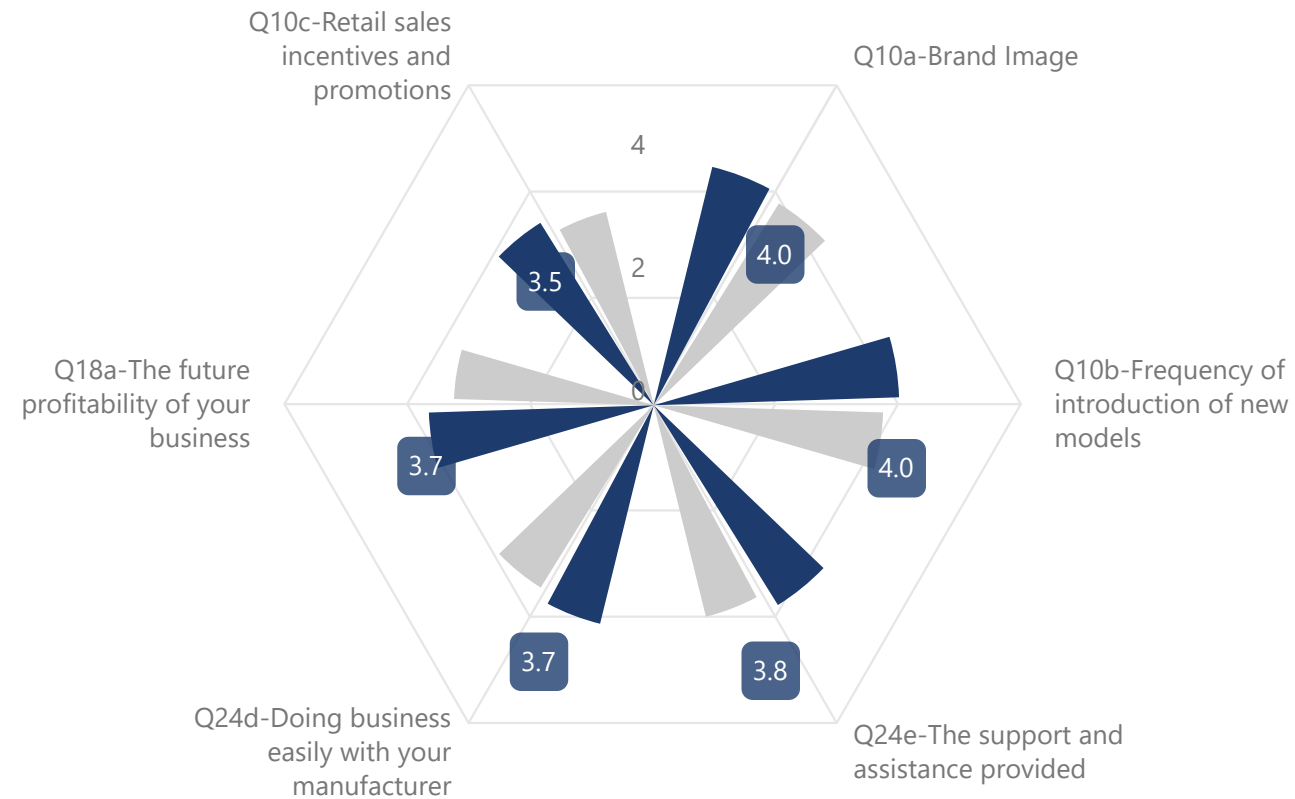
Spring 23

20.0% 20.0% 20.0% 40.0%

Autumn 22

Top 6 Questions vs Average

Brand 2023 ● Average 2023 ●



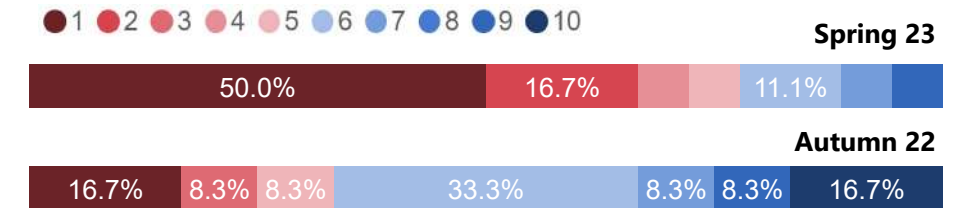
Bottom 6 Questions vs Average



Piaggio Group Brand Performance

How do you rate the value of holding your motorcycle franchise?

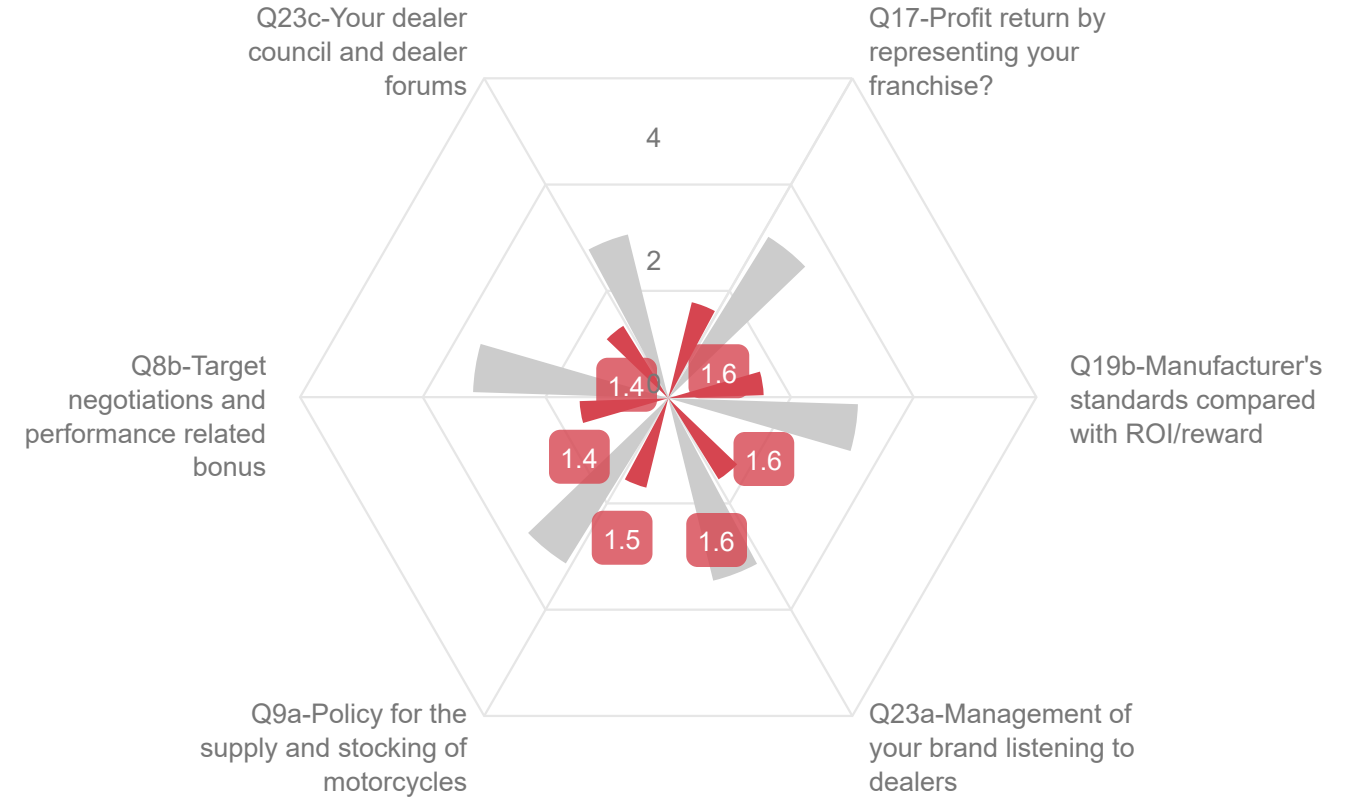
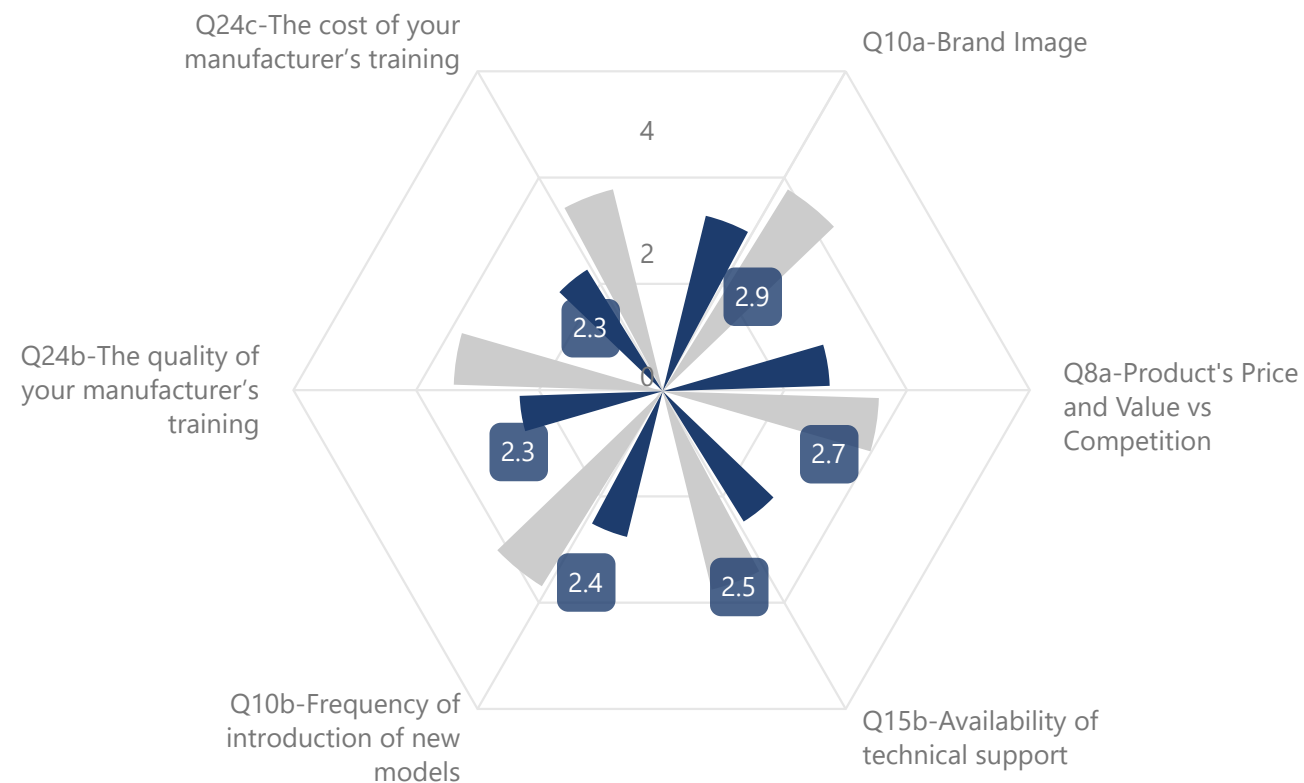
| % Response Rate | +-% Change | Spring 23 | Autumn 22 |
|-----------------|---------------|------------|------------|
| 41% | -50.5% | 2.9 | 5.8 |



Top 6 Questions vs Average

Brand 2023 ● Average 2023 ●

Bottom 6 Questions vs Average



Royal Enfield Brand Performance

How do you rate the value of holding your motorcycle franchise?

% Response Rate

10%

+-% Change

0.9%

Spring 23

8.6

Autumn 22

8.5

● 1 ● 2 ● 3 ● 4 ● 5 ● 6 ● 7 ● 8 ● 9 ● 10

12.5% 12.5% 12.5% 25.0% 37.5%

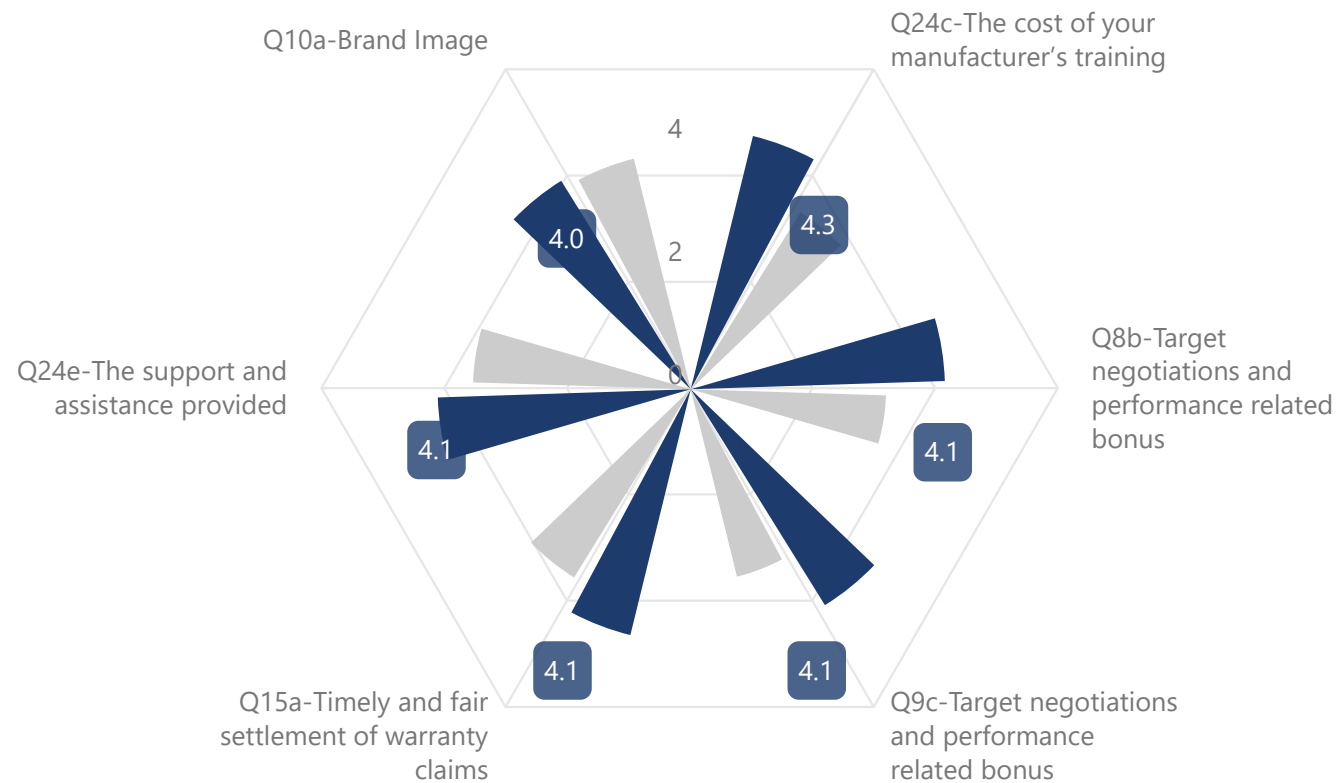
Spring 23

9.1% 18.2% 18.2% 9.1% 45.5%

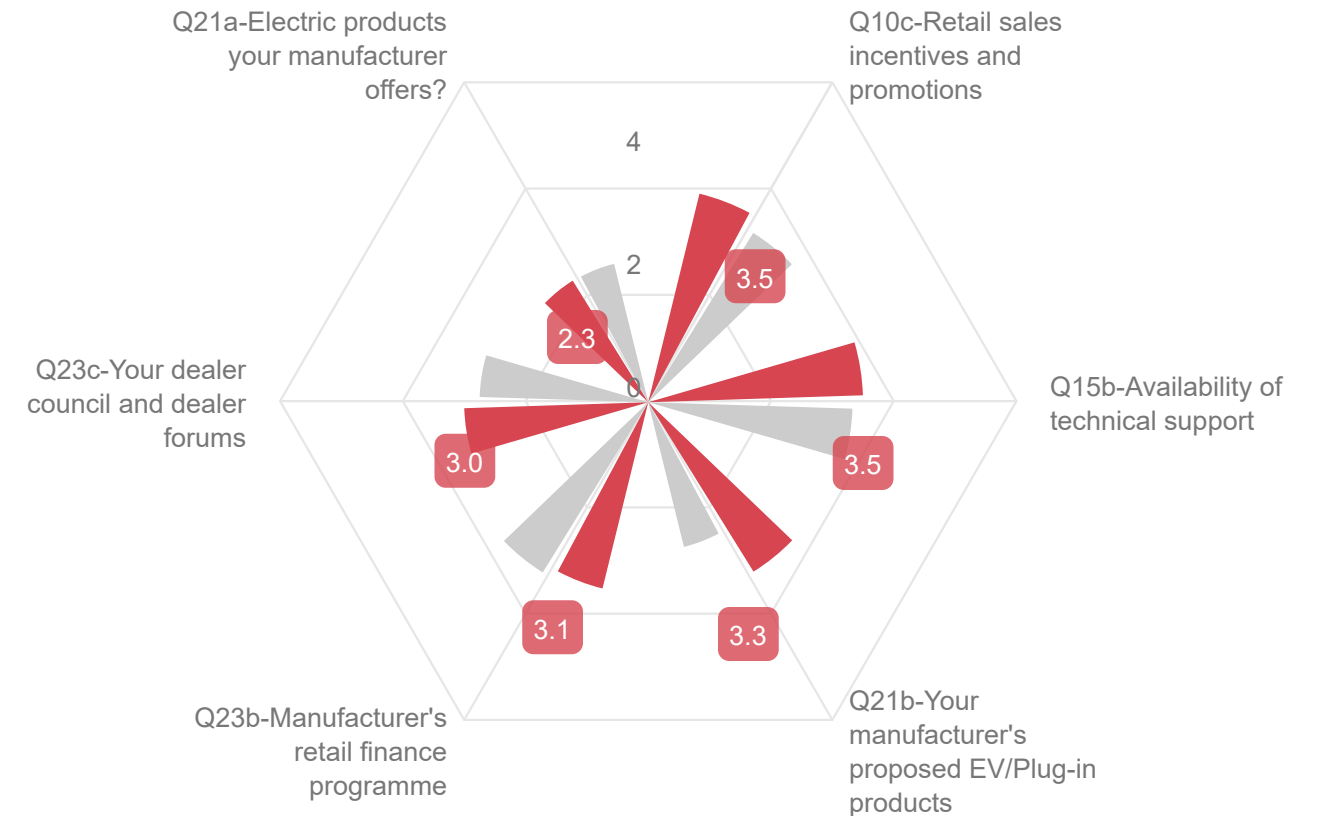
Autumn 22

Top 6 Questions vs Average

Brand 2023 ● Average 2023 ●



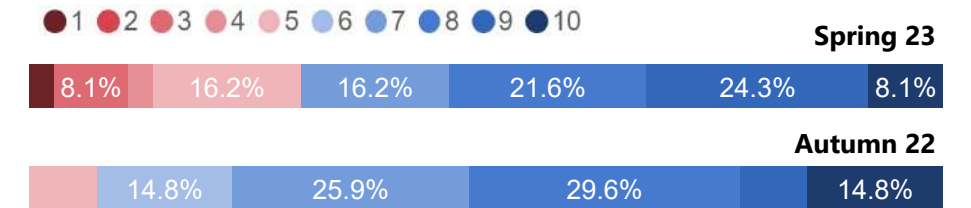
Bottom 6 Questions vs Average



Suzuki Brand Performance

How do you rate the value of holding your motorcycle franchise?

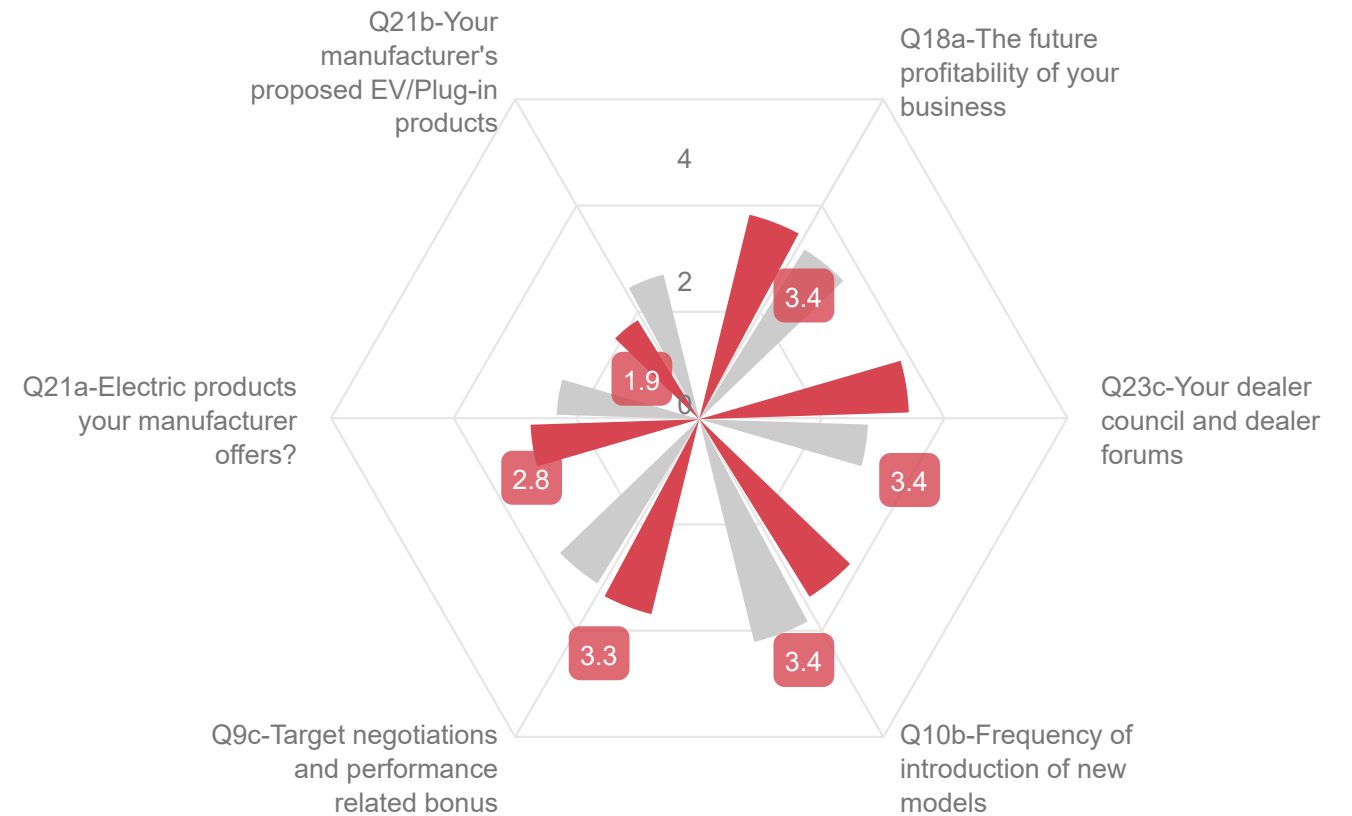
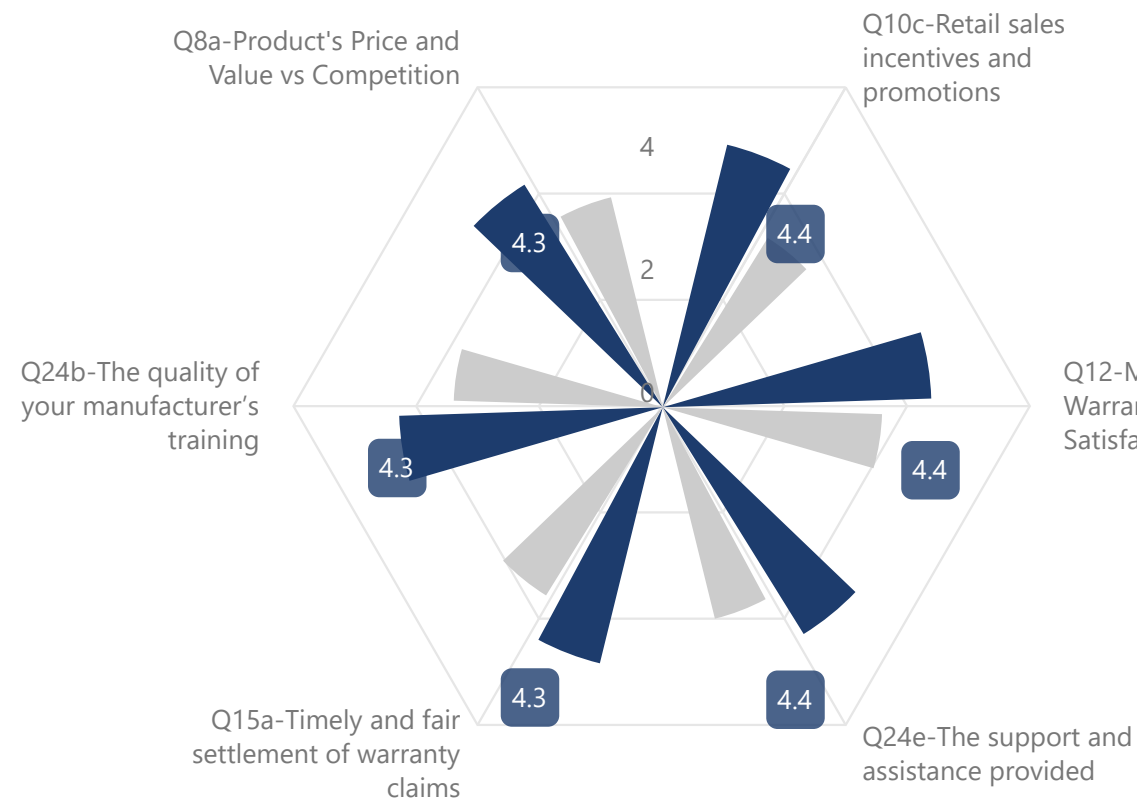
| % Response Rate | +-% Change | Spring 23 | Autumn 22 |
|-----------------|--------------|------------|------------|
| 59% | -7.1% | 7.1 | 7.6 |



Top 6 Questions vs Average

Brand 2023 ● Average 2023 ●

Bottom 6 Questions vs Average



Triumph Brand Performance

How do you rate the value of holding your motorcycle franchise?

% Response Rate

26%

+-% Change

4.9%

Spring 23

9.5

Autumn 22

9.1

1 2 3 4 5 6 7 8 9 10

50.0% 50.0%

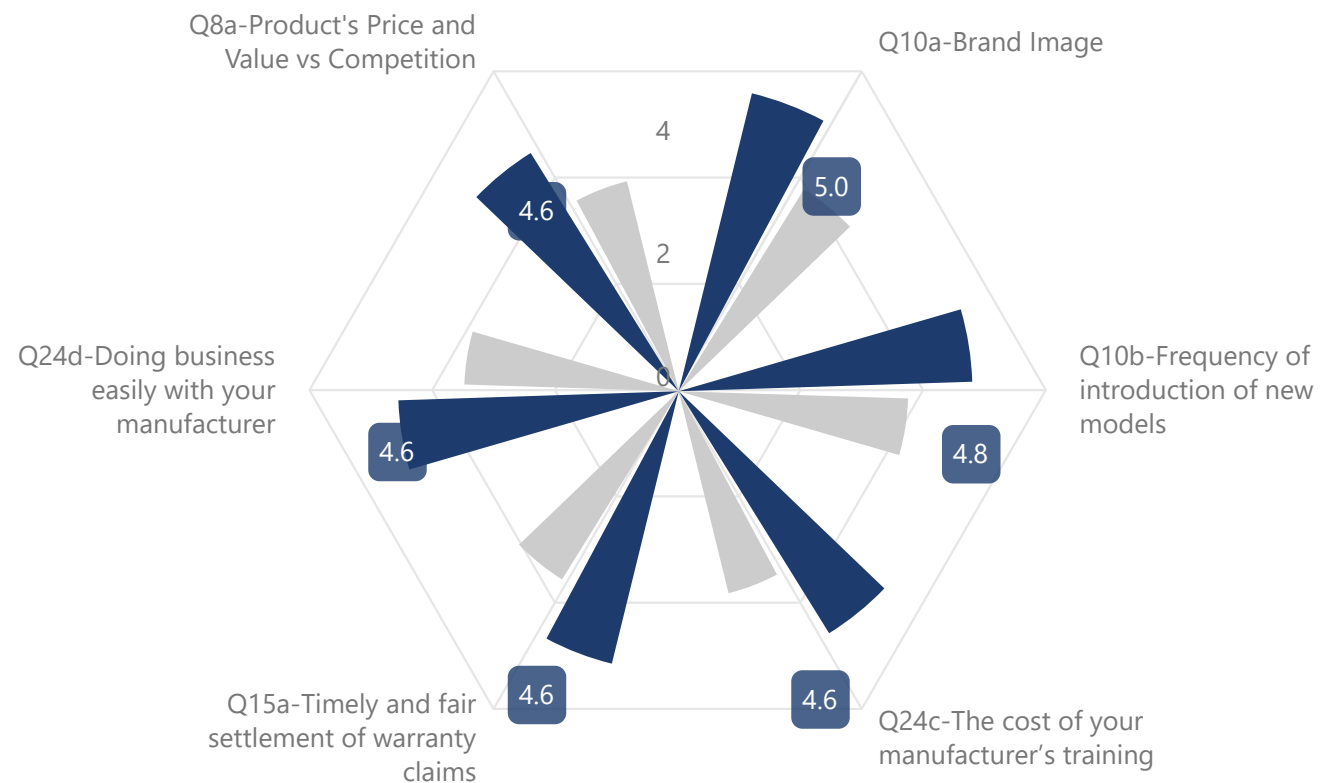
Spring 23

52.9% 35.3%

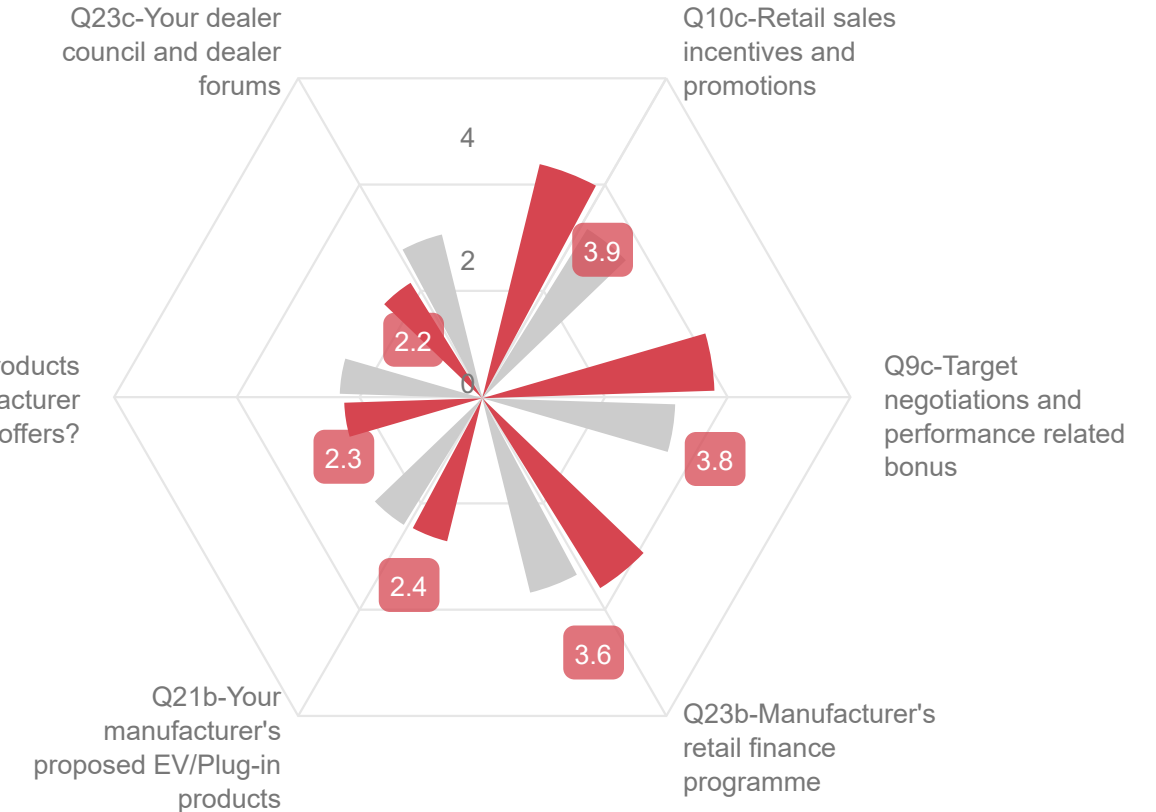
Autumn 22

Top 6 Questions vs Average

Brand 2023 ● Average 2023 ●



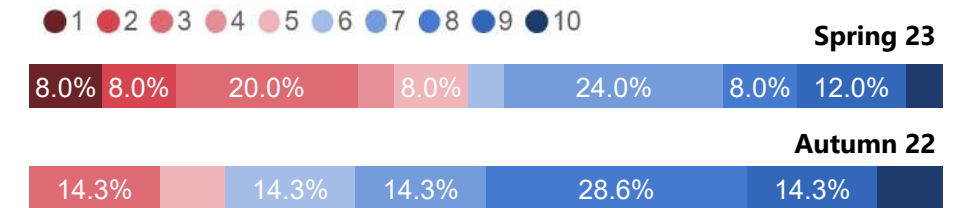
Bottom 6 Questions vs Average



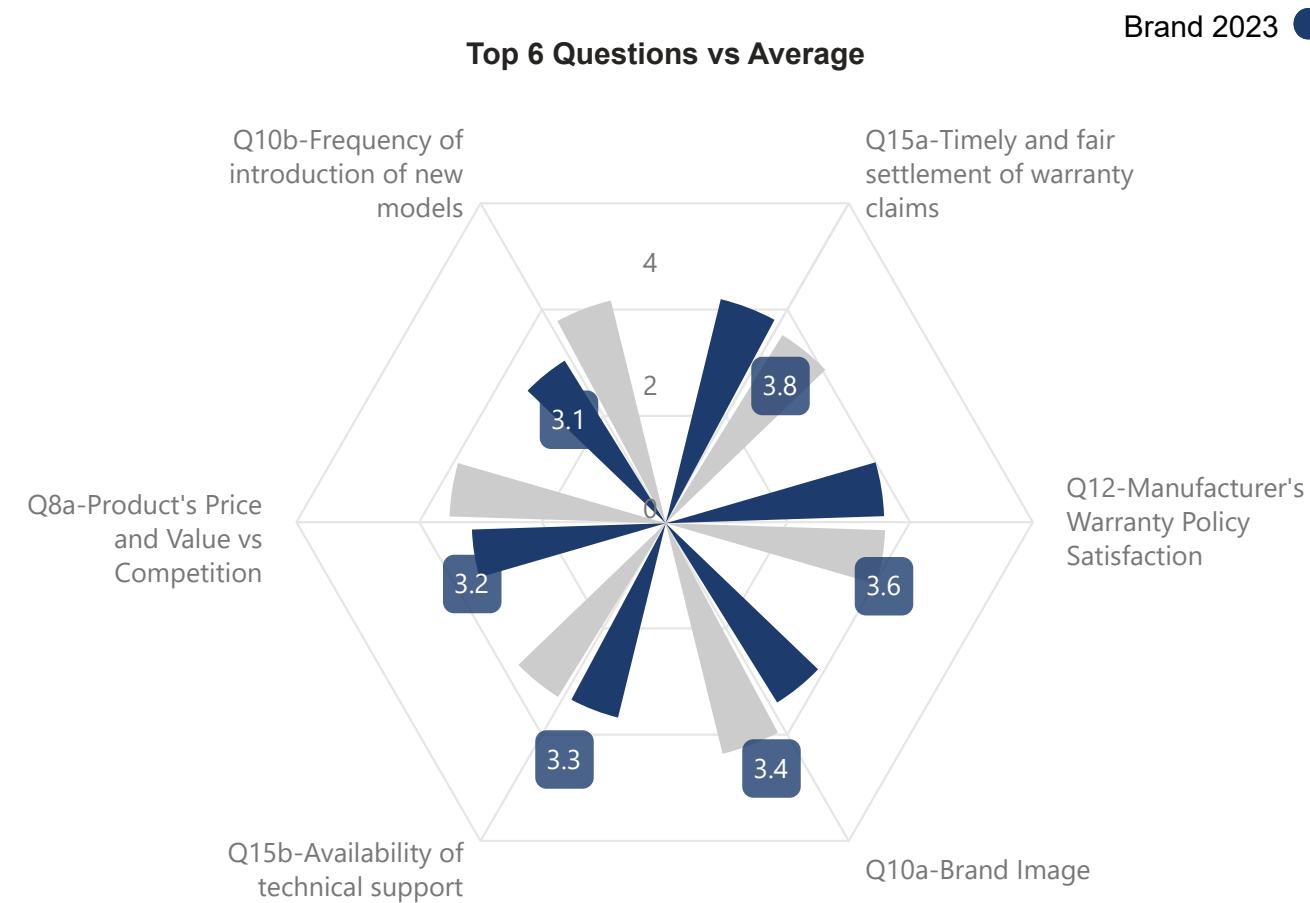
Yamaha Brand Performance

How do you rate the value of holding your motorcycle franchise?

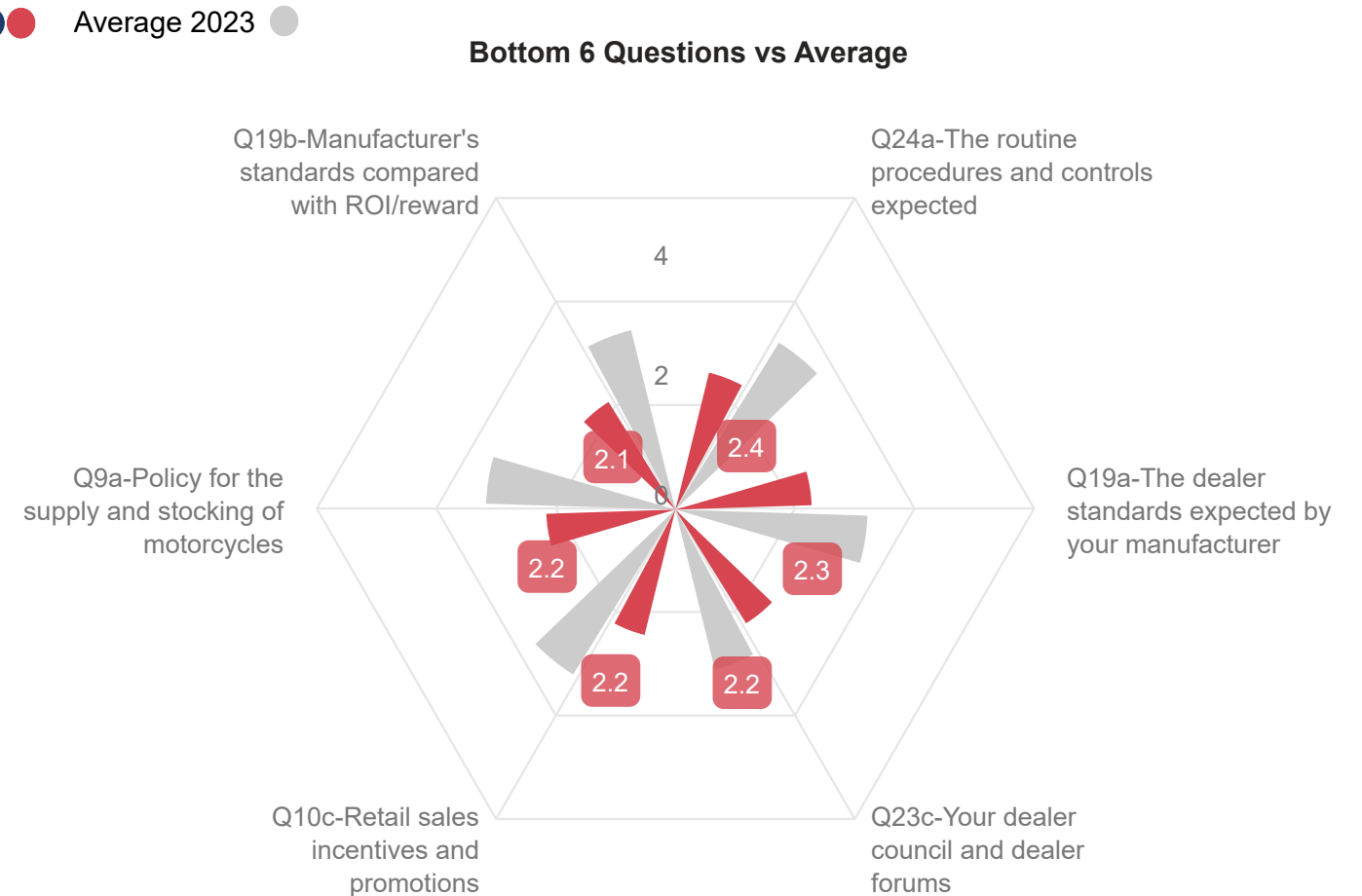
| % Response Rate | +-% Change | Spring 23 | Autumn 22 |
|-----------------|---------------|------------|------------|
| 35% | -21.5% | 5.4 | 6.9 |



Top 6 Questions vs Average



Bottom 6 Questions vs Average



National Motorcycle Dealers Association

Dealer Attitude Survey

Spring 2023 Edition

201 Great Portland Street, London, W1W 5AB

Tel: 020 7580 9122