



# NFDA

NATIONAL FRANCHISED DEALERS ASSOCIATION



## Dealer Attitude Survey

Winter 2021/2022

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## Introduction

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Dear Colleague,

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

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

The winter 2021/2022 edition of the survey attracted a record response rate of 67% with a total of 2,753 responses from 31 participating dealer networks.

The DAS takes place twice a year and this edition was conducted in January 2022. The survey asked franchised dealers questions covering business issues that are key to a successful working relationship with their respective manufacturers. Responses are scored from 1 (extremely dissatisfied) to 10 (extremely satisfied).

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

In particular, franchised dealers' ratings revealed high levels of satisfaction around current profit return, margins on used cars and manufacturers' finance programmes.

The all-important question 'how would you rate your manufacturer overall on a scale of 1 to 10?' returned an average of 6.6 points out of 10, which was 0.1 higher than six months ago.

Unsurprisingly as supply issues continue to impact the market, dealers showed concerns with the availability of parts, returning one of the lowest average scores.

This report is a summary of the results of the NFDA Dealer Attitude Survey winter 2021/2022, it gives an overview of the findings through the charts and the analysis of the main questions.

A full version of the report is available on request.

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

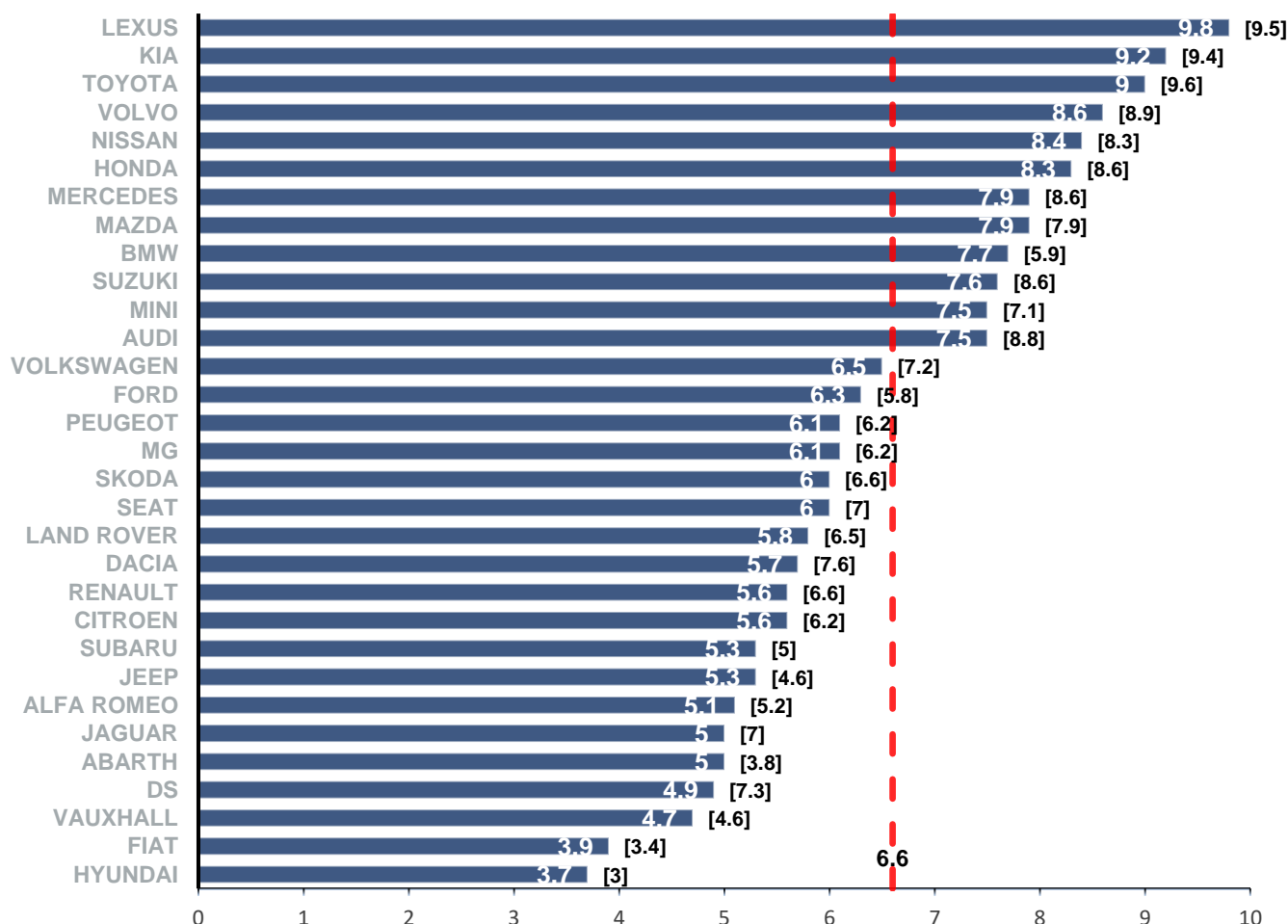
**Sue Robinson**

Chief Executive, National Franchised Dealers Association



## Manufacturer support

How satisfied are you with the level of your manufacturer’s support throughout the COVID-19 crisis?



Figures in white = Winter 2021/2022

Figures in black = Summer 2021

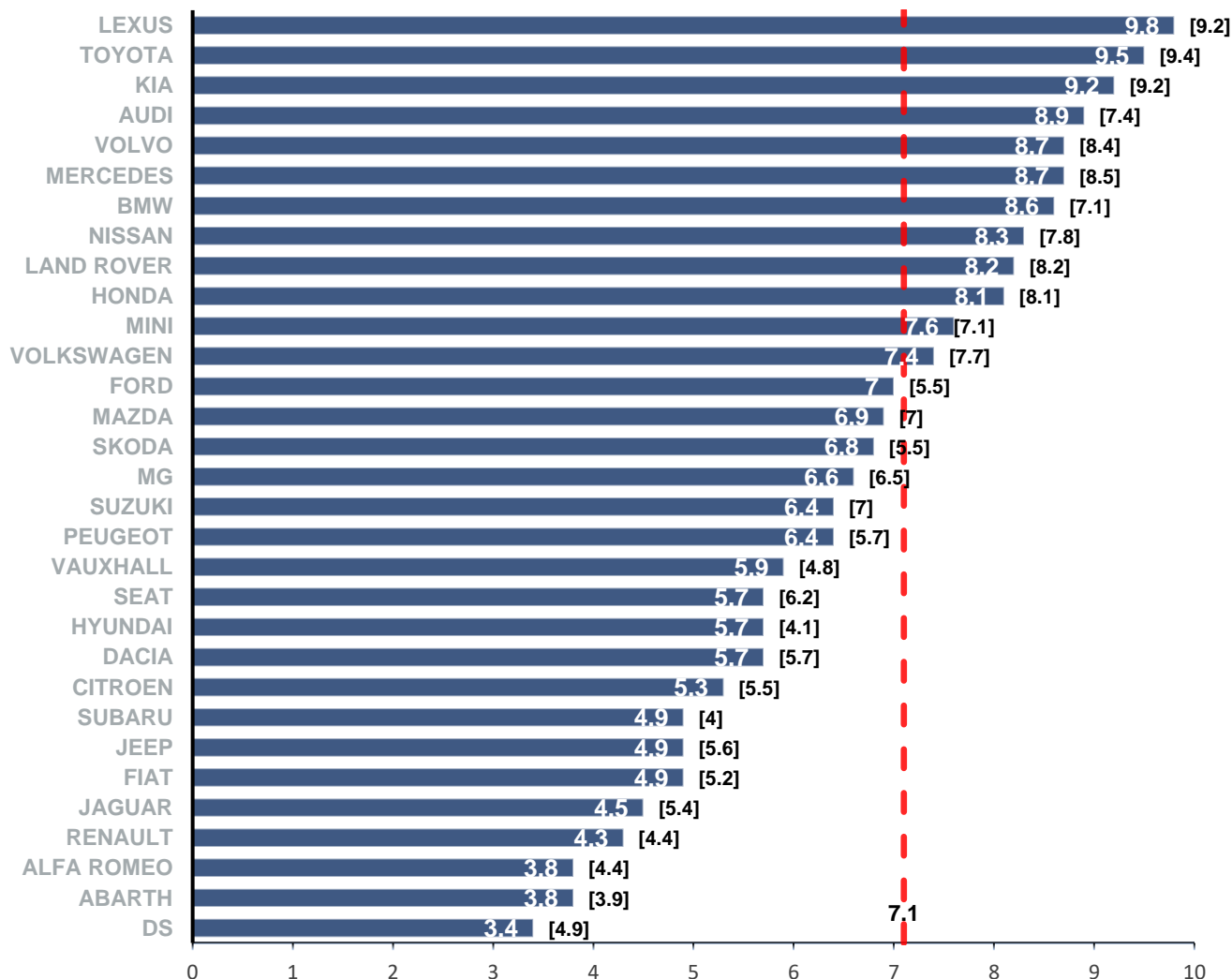
<b>Biggest improvement:</b>	BMW	+1.8 points
<b>Largest decline:</b>	DS	-2.4 points
<b>Average score:</b>		6.6 points
<b>Previous average:</b>		6.8 points

### Summary

Average dealers’ satisfaction levels with the support received from their manufacturers throughout the pandemic declined slightly to 6.6 out of 10 points from 6.8 in the summer edition of the survey. Out of all respondents, 11 experienced increased satisfaction levels, 1 remained the same and 19 decreased; 25 dealer networks scored above 5.0 points, with 4 networks attaining marks below.

## Profit return

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



**Biggest improvement:** Hyundai +1.6 points

**Largest decline:** DS -1.5 points

**Average score:** 7.1 points

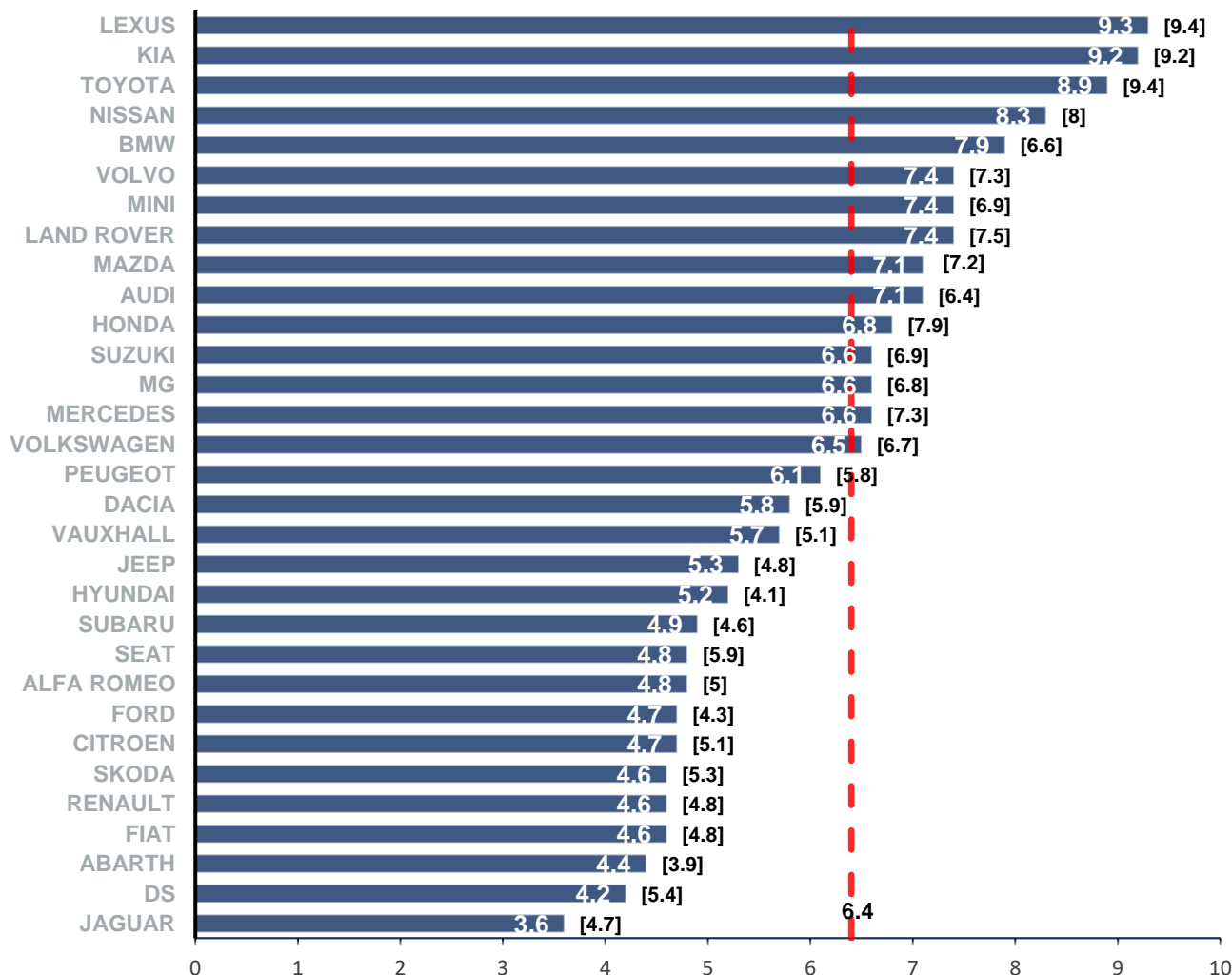
**Previous average:** 6.6 points

### Summary

The average dealers' satisfaction with their current profit rose to 7.1 points. A small majority (15 networks) had an improved satisfaction rate with 4 remaining constant and 12 declining. 23 networks provided scores above 5.0 points, with 7 below.

## Profit return

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



**Biggest improvement:** BMW +1.3 points

**Largest decline:** DS -1.2 points

**Average score:** 6.4 points

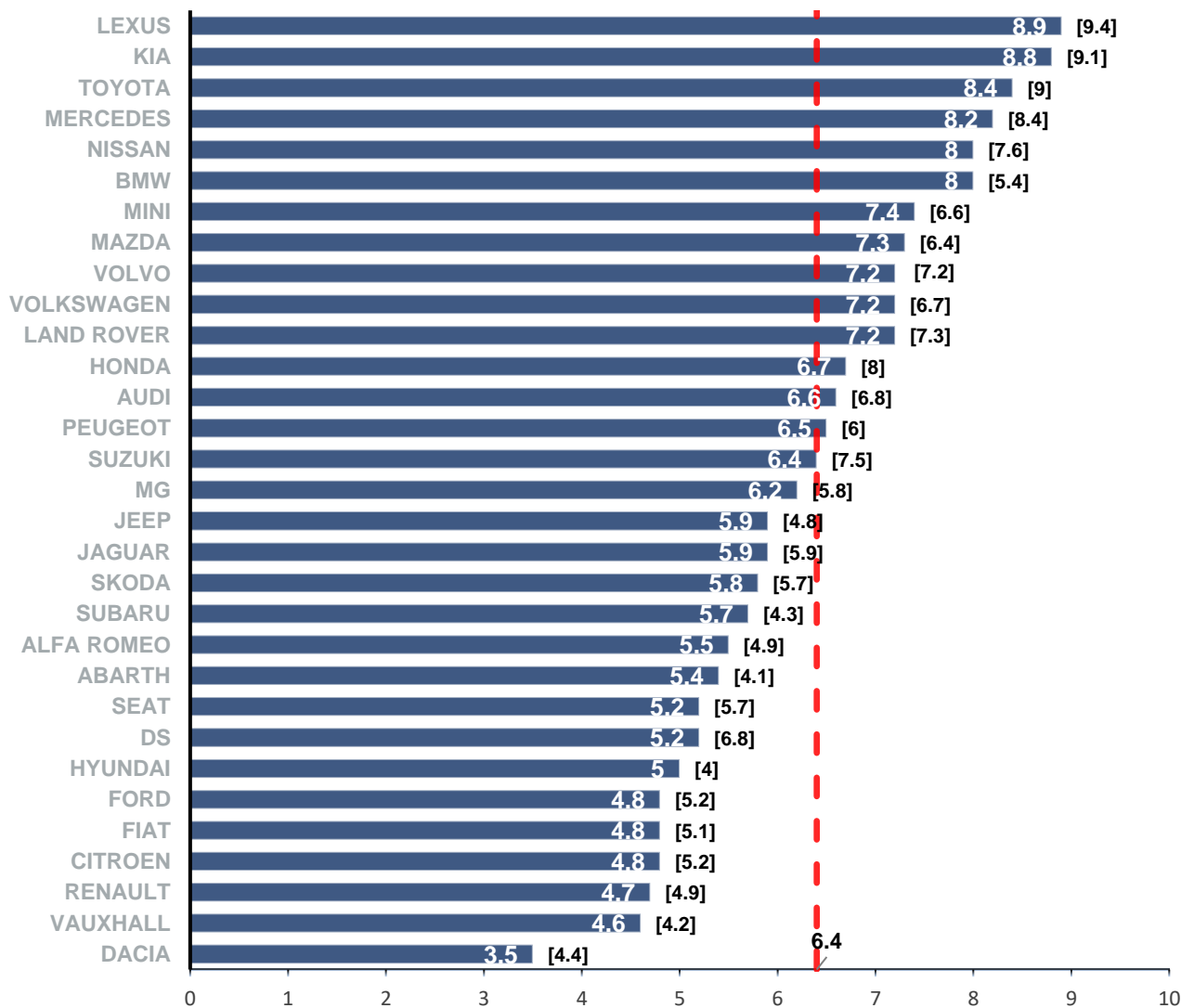
**Previous average:** 6.3 points

### Summary

Dealers' satisfaction levels with their predicted future profit return increased marginally to an average score of 6.4 points. 12 networks saw an increase in their satisfaction levels, while 18 decreased and 1 remained the same; 20 networks scored above the 5.0 mark.

## Profit return

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



**Biggest improvement:** BMW +2.6 Points

**Largest decline:** DS -1.6 points

**Average score:** 6.4 points

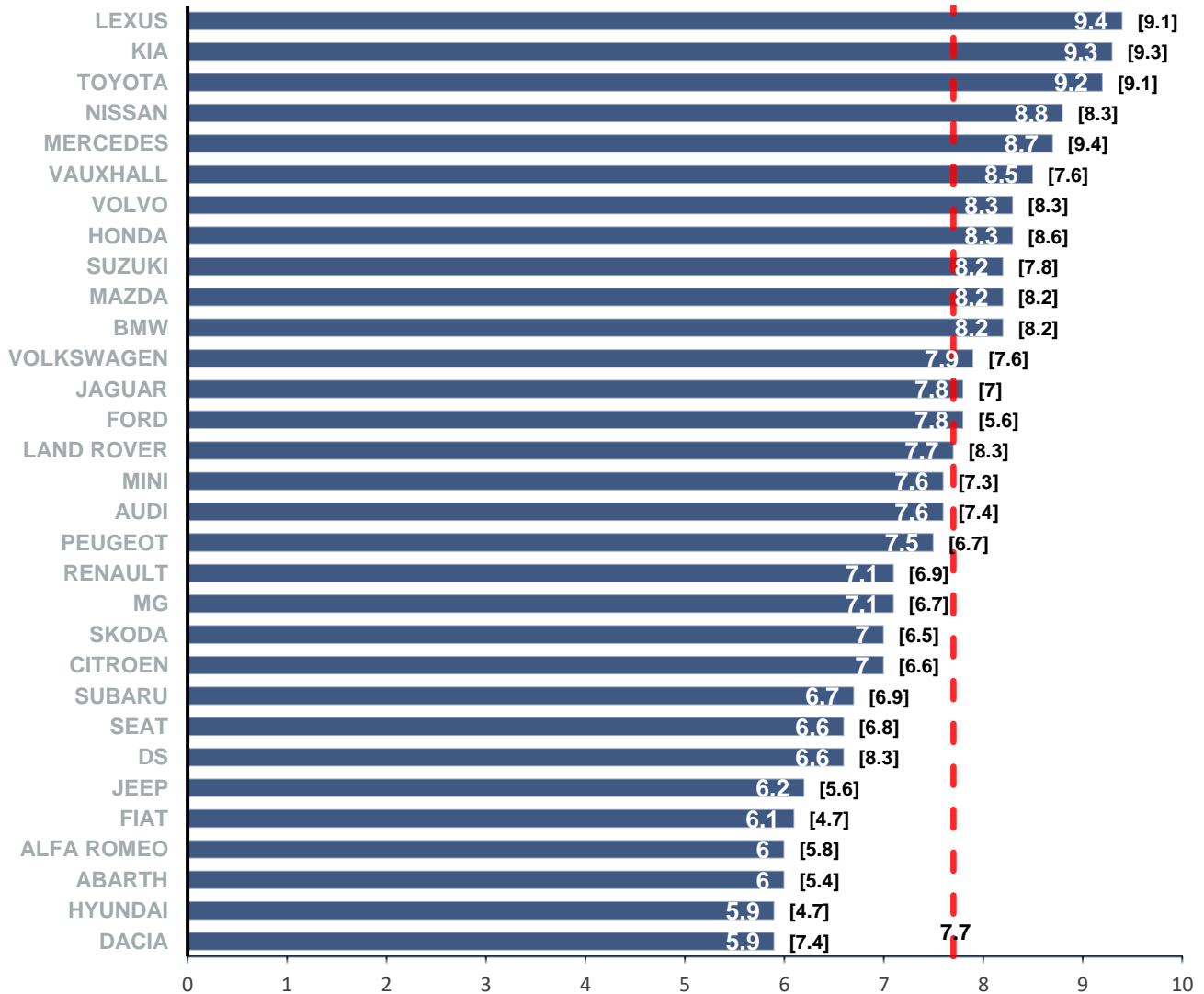
**Previous average:** 6.2 points

### Summary

The average dealers' satisfaction with their total margins on new vehicles went up by 0.2 points from the summer survey to 6.4 points and up by 0.6 points from the same time last year. There were 5 responses that scored below 5.0, with the remaining 26 above; 24 networks increased their level of satisfaction, whilst 7 remained constant.

## Profit return

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



<b>Biggest improvement:</b>	Ford	+2.2 points
<b>Largest decline:</b>	DS	-1.7 points
<b>Average score:</b>		7.7 points
<b>Previous average:</b>		7.4 points

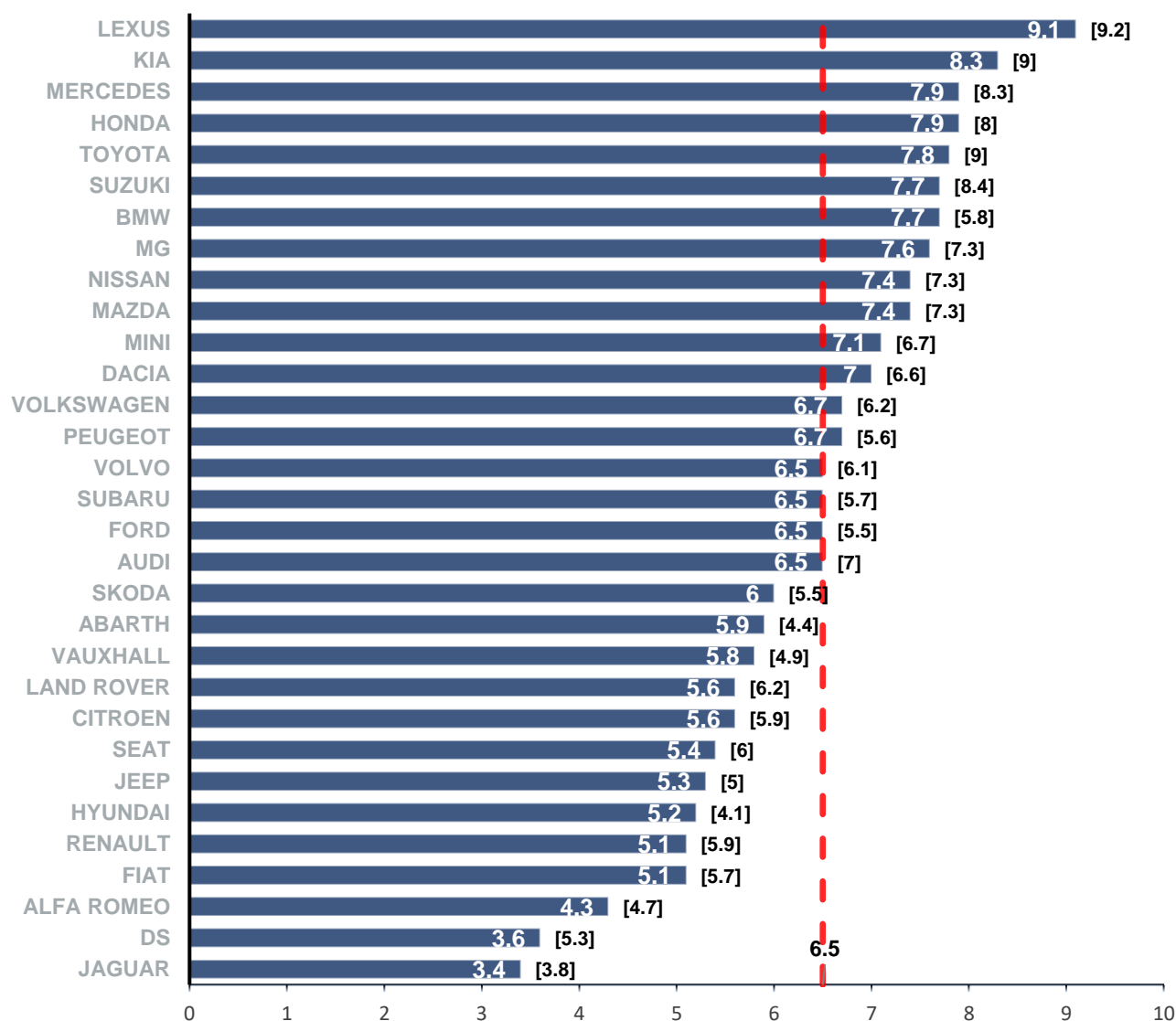
### Summary

The average score given in response to dealers’ satisfaction with their margin on used car sales was up by 0.3 from six months ago to 7.7 points. 20 networks increased their score, 4 remained the same and 7 decreased; all networks scored better than 5.0 points.



## Return on investment

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



**Biggest improvement:** BMW +1.9 points

**Largest decline:** DS -1.7 points

**Average score:** 6.5 points

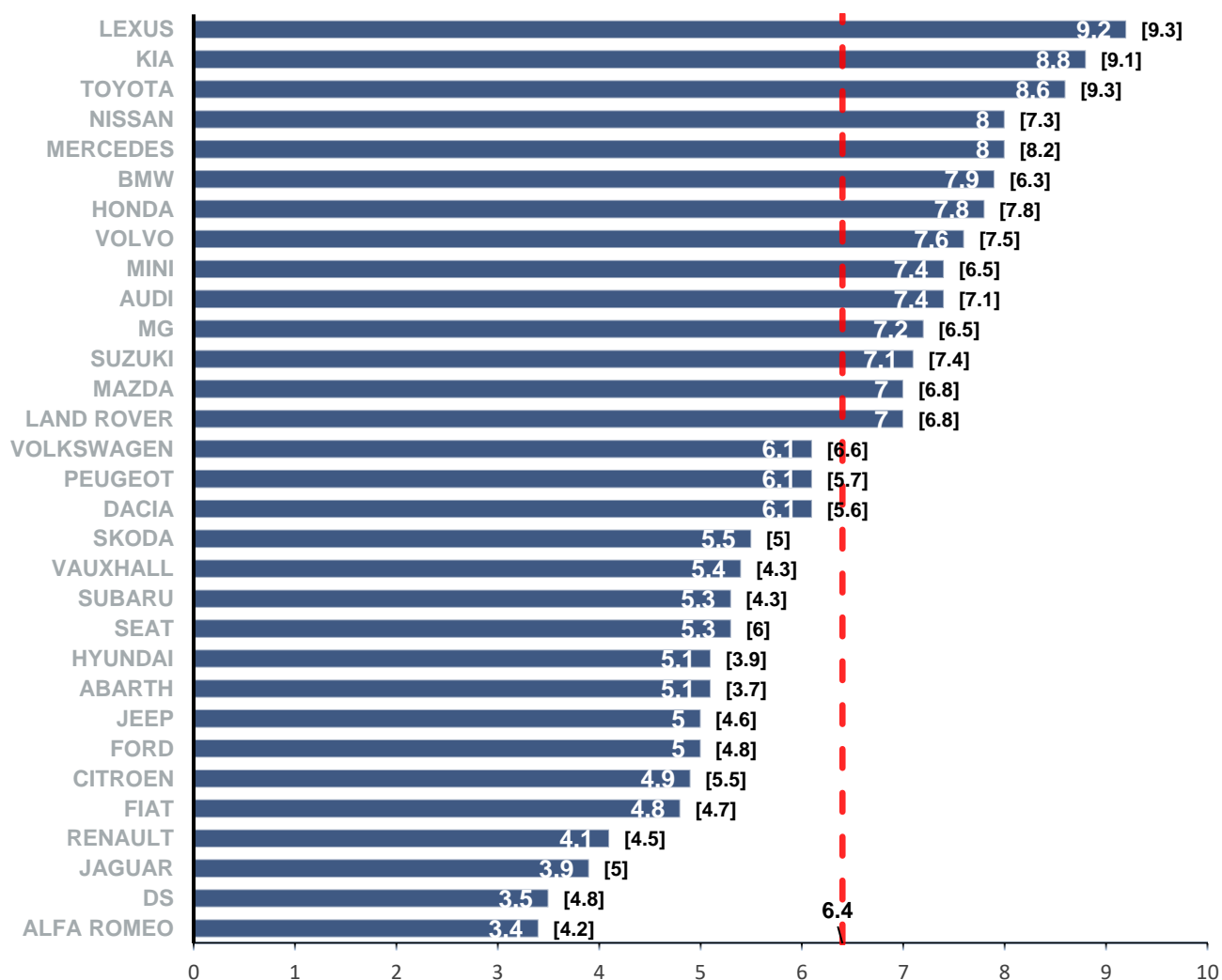
**Previous average:** 6.4 points

### Summary

Average dealers' satisfaction levels with the required level of capital investment grew by 0.1 points from the winter survey to 6.5 points. A year ago, the average was 5.9. Out of all average scores, 15 experienced a decrease compared to six months before, while 16 increased; 28 ratings were above 5.0 points.

## Return on investment

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



**Biggest improvement:** BMW +1.6 points

**Largest decline:** DS -1.3 points

**Average score:** 6.4 points

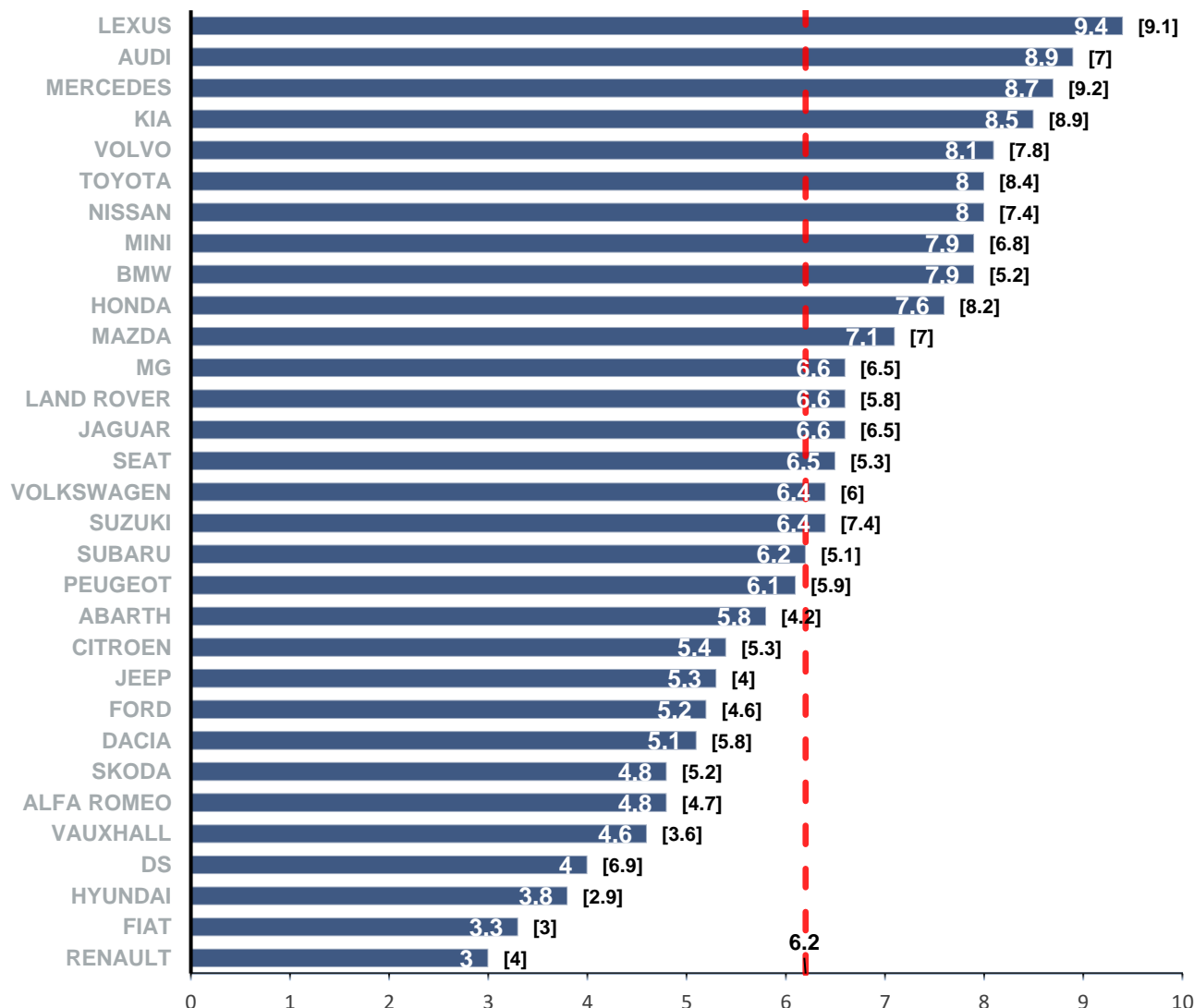
**Previous average:** 6.2 points

### Summary

The average score for networks' satisfaction levels with the return on capital for their dealerships rose by 0.2 points from six months ago, from 6.2 to 6.4; compared to twelve months ago, the score grew by 0.8 points. Responses showed that 18 dealer networks experienced an increase, while 1 stayed the same, and 12 dropped. There were 23 ratings above 5.0.

## Targets

Are the volume target aspirations of your manufacturer realistic?



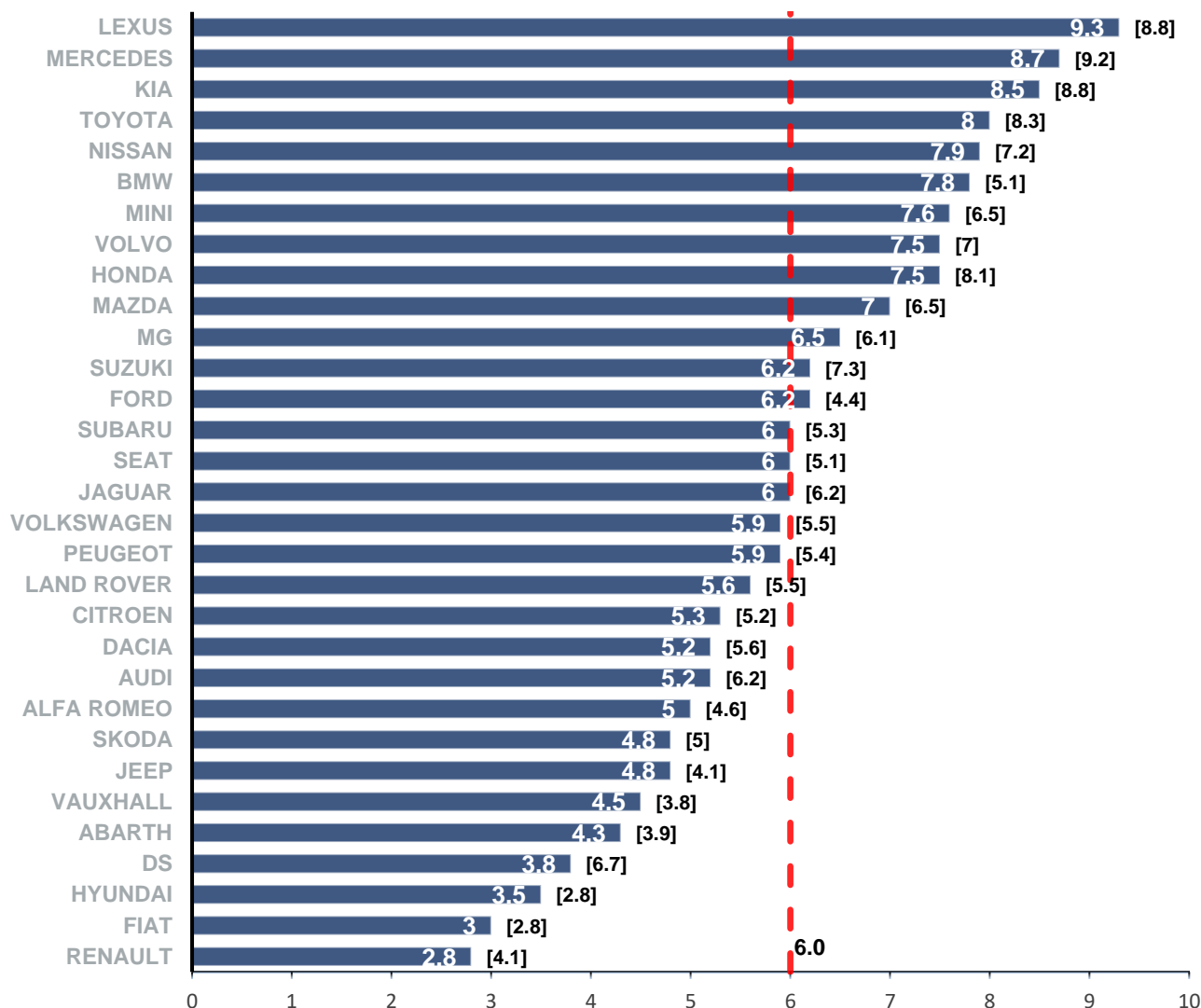
<b>Biggest improvement:</b>	BMW	+2.7 points
<b>Largest decline:</b>	DS	-2.9 points
<b>Average score:</b>		6.2 points
<b>Previous average:</b>		5.9 points

### Summary

Average dealers' satisfaction levels with their manufacturers' target aspirations improved by 0.3 points from the winter survey and by 0.9 from a year ago; the rating now stands at 6.2 points. Compared to the previous survey, 9 networks saw a reduction in their satisfaction rates, with 22 rising; 24 networks were above 5.0 points.

## Targets

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



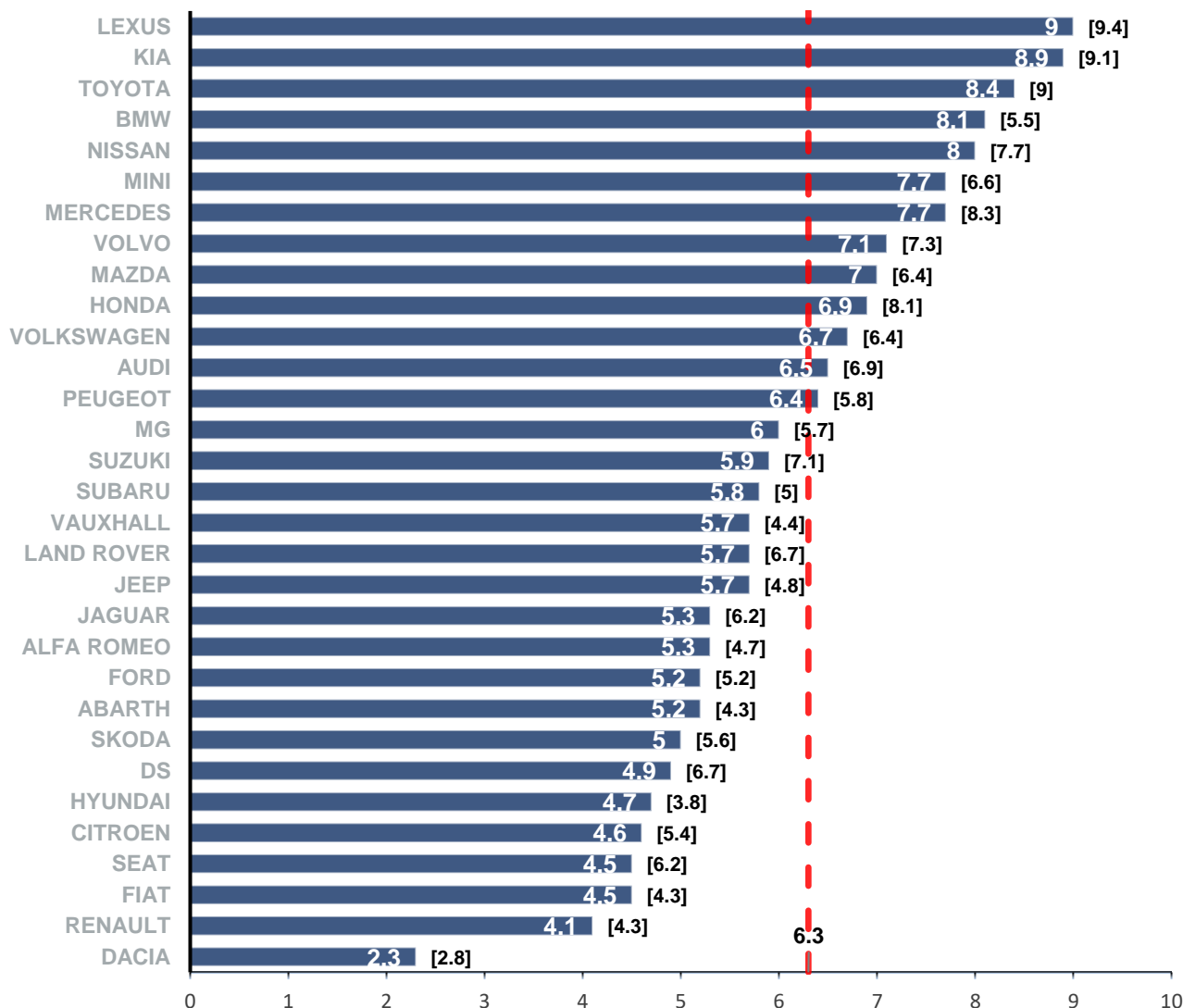
<b>Biggest improvement:</b>	BMW	+ 2.7 points
<b>Largest decline:</b>	DS	-2.9 points
<b>Average score:</b>		6.0 points
<b>Previous average:</b>		5.7 points

### Summary

Dealers' satisfaction levels with their new car targeting process improved by 0.3 points, from 5.7 six months ago to 6.0 in the current edition of the survey. 20 networks experienced an increase in score, with 11 decreasing; 22 responses were above the 5.0 mark.

## Incentives

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



**Biggest improvement:** BMW +2.6 points

**Largest decline:** DS -1.8 points

**Average score:** 6.3 points

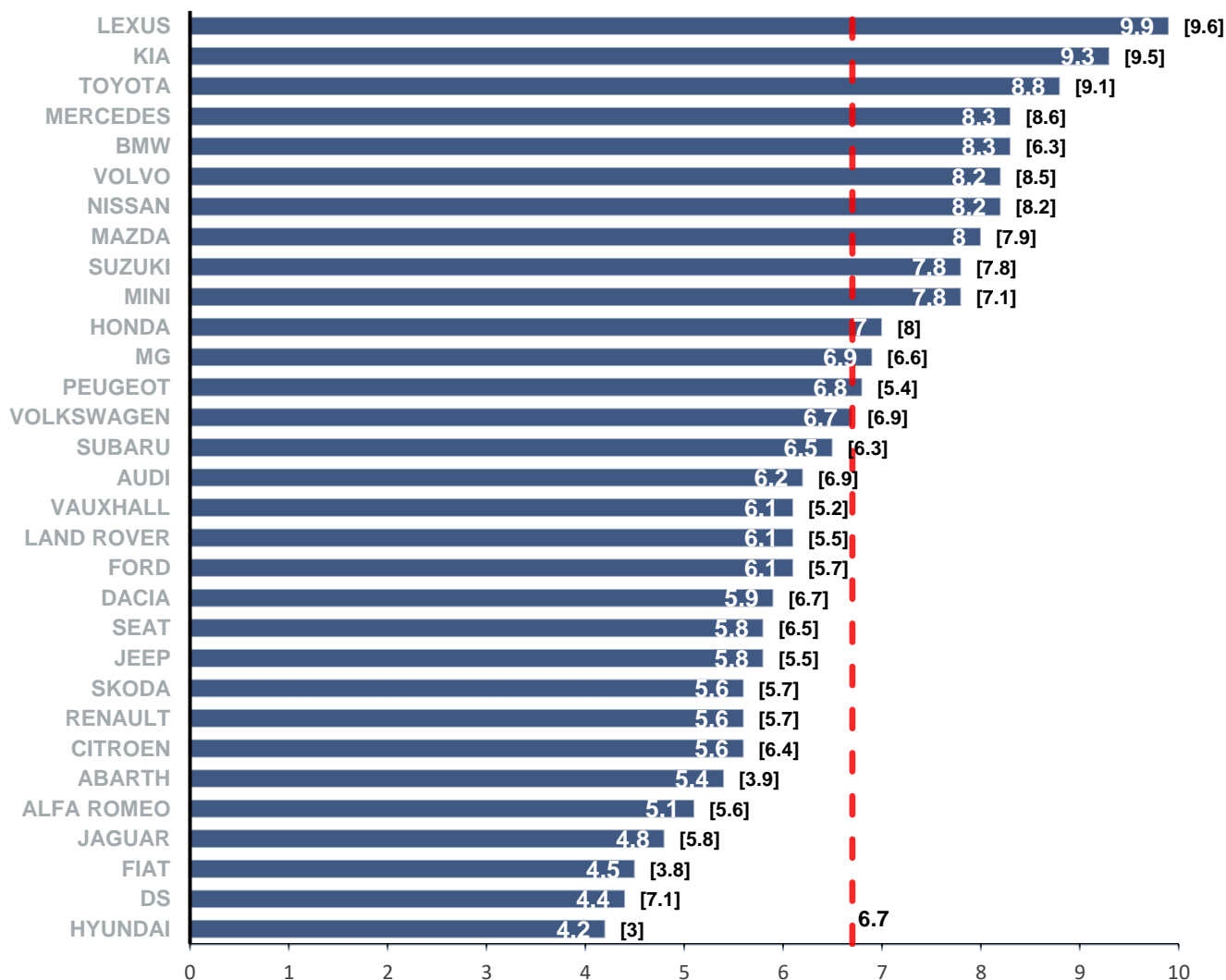
**Previous average:** 6.1 points

### Summary

Dealers are more satisfied with their current bonus and rebates on new cars than they were six months ago, with an average score of 6.3 points, up from 5.1 in the summer edition of the survey; a year ago, the average was 5.8. 23 networks had average scores above 5.0 points. 14 ratings improved from six months ago, with 16 decreasing and 1 staying the same.

## Day-to-day working relationship

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



**Biggest improvement:** BMW +2.0 points

**Largest decline:** DS -2.7 points

**Average score:** 6.7 points

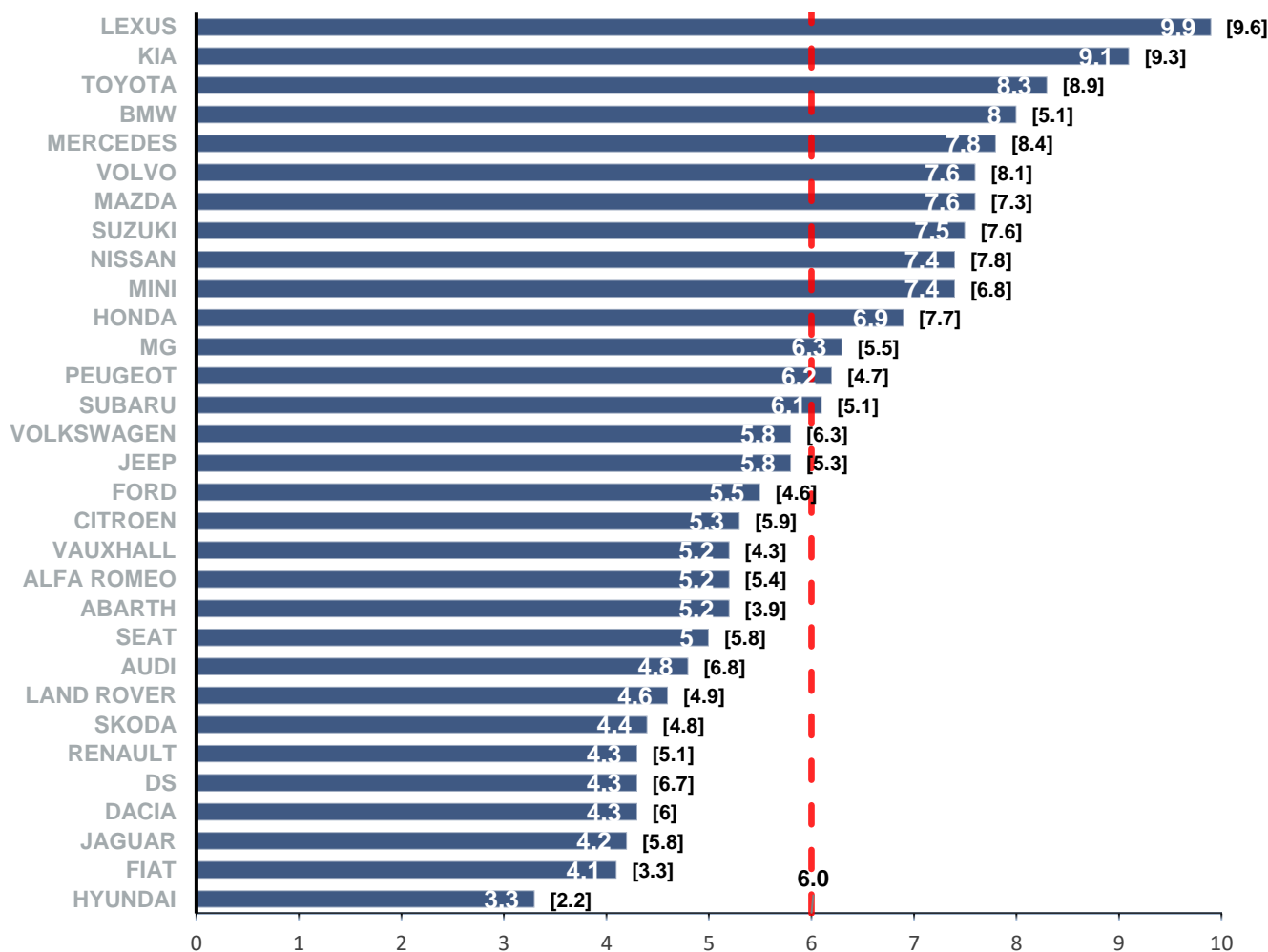
**Previous average:** 6.6 points

### Summary

This edition of the survey saw a 0.1 point increase in dealers' average rating given to the ability to do business on a day-to-day basis with their manufacturer, up from 6.6 to 6.7 points. Overall, 14 manufacturers experienced an increase with 15 reducing and 2 remaining constant. 29 networks had a score above 5.0 marks.

## Day-to-day working relationship

Does the management of your manufacturer take dealers' views and opinions into account?



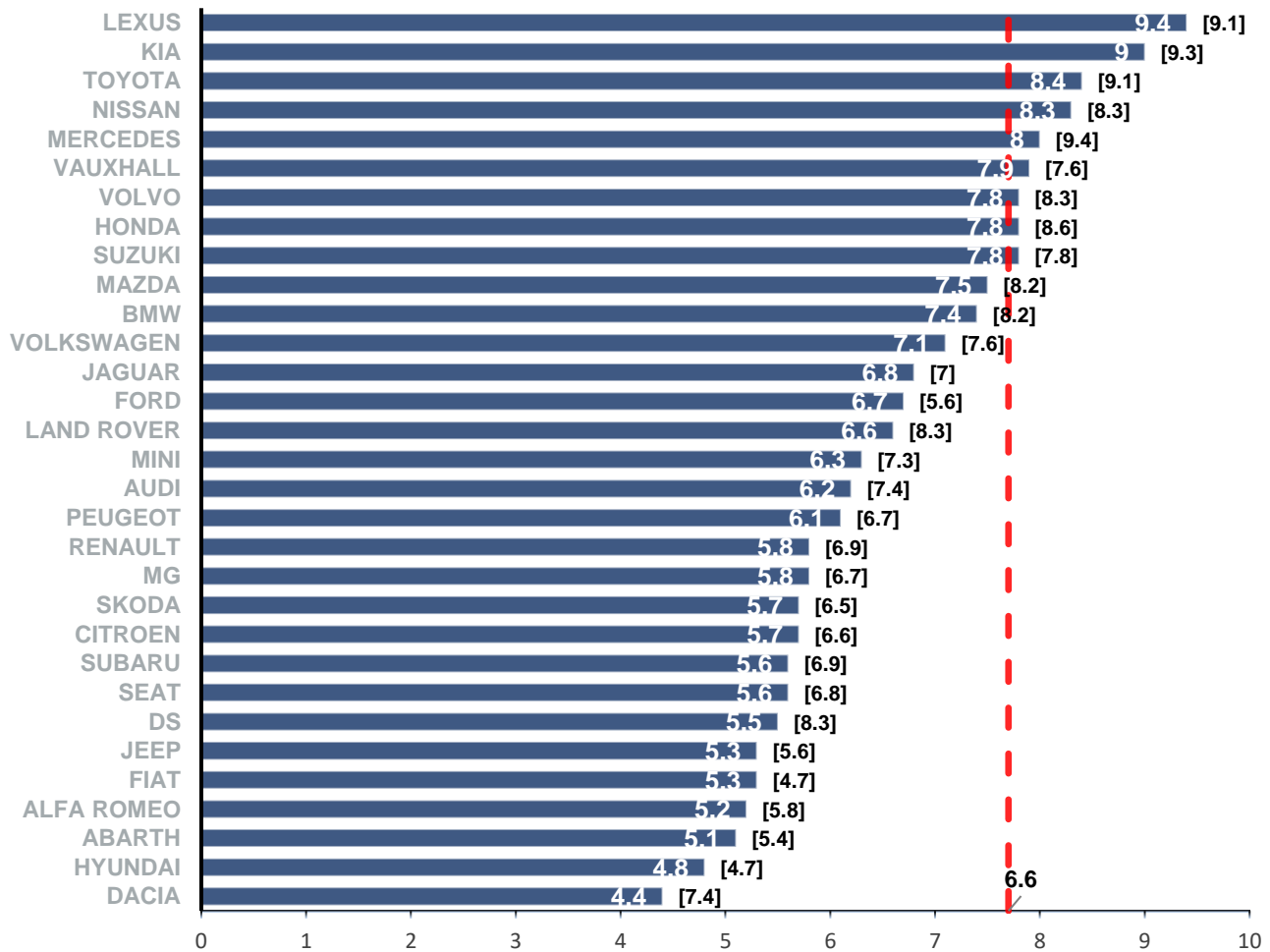
<b>Biggest improvement:</b>	BMW	+2.9 points
<b>Largest decline:</b>	DS	-2.4 points
<b>Average score:</b>		6.0 points
<b>Previous average:</b>		6.0 points

### Summary

The average score about manufacturers' taking their networks' views into account has remained the same at 6.0 points. In total, 15 networks increased their scores from the previous study, while 16 decreased. 21 responses were above 5.0 points.

## Standards and performance measures

Are your manufacturer's dealer standards fair and reasonable?



<b>Biggest improvement:</b>	Abarth	+2.0 points
<b>Largest decline:</b>	DS	-1.4 points
<b>Average score:</b>		6.6 points
<b>Previous average:</b>		6.5 points

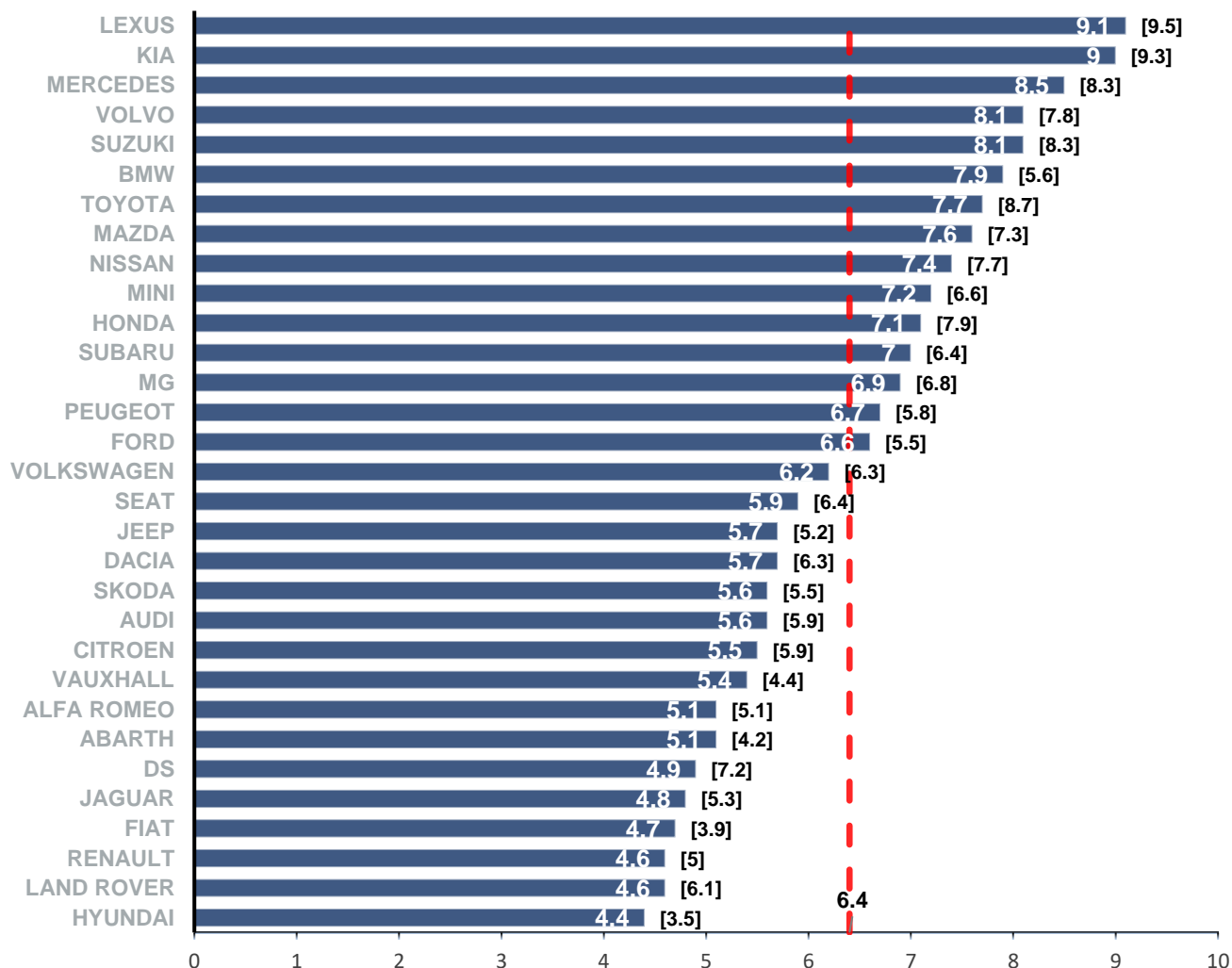
### Summary

The average score concerning dealers' satisfaction with manufacturers' standards increased marginally to 6.6 points. 16 dealer networks raised their score whilst 14 saw a drop and 1 remained constant; 29 responses were above the 5.0 point mark.



## Standards and performance measures

Are the performance measures used by your manufacturer on your business fair and reasonable?



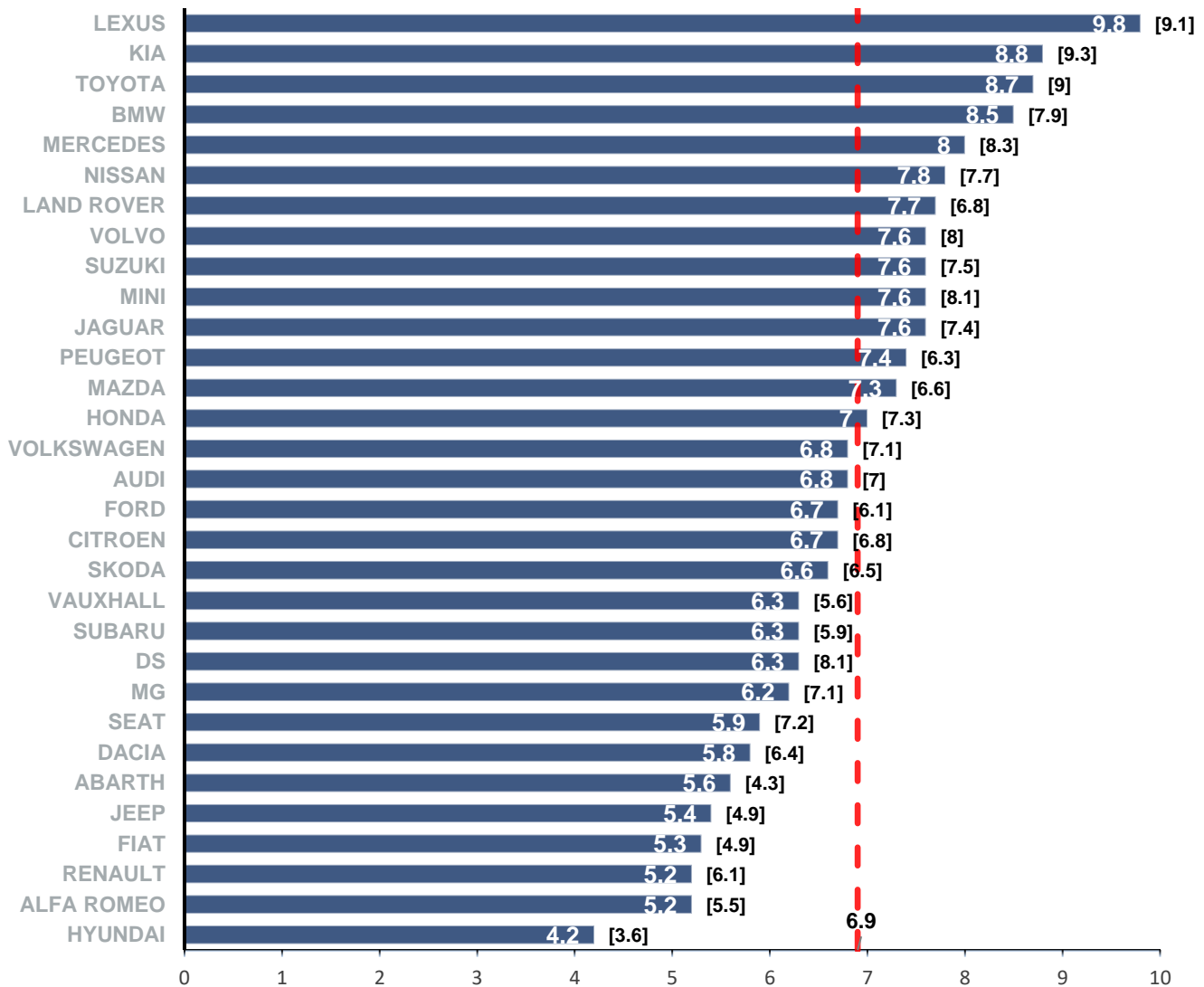
<b>Biggest improvement:</b>	BMW	+2.3 points
<b>Largest decline:</b>	DS	-2.3 points
<b>Average score:</b>		6.4 points
<b>Previous average:</b>		6.3 points

### Summary

Dealers' satisfaction levels with the standard and performance measures used by their manufacturers have increased from 6 months ago to an average score of 6.4 points. A year ago, the average was 6.3. For this question, 15 scores improved, 1 did not change and 15 decreased; 31 responses were greater than 5.0 points.

## Training

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



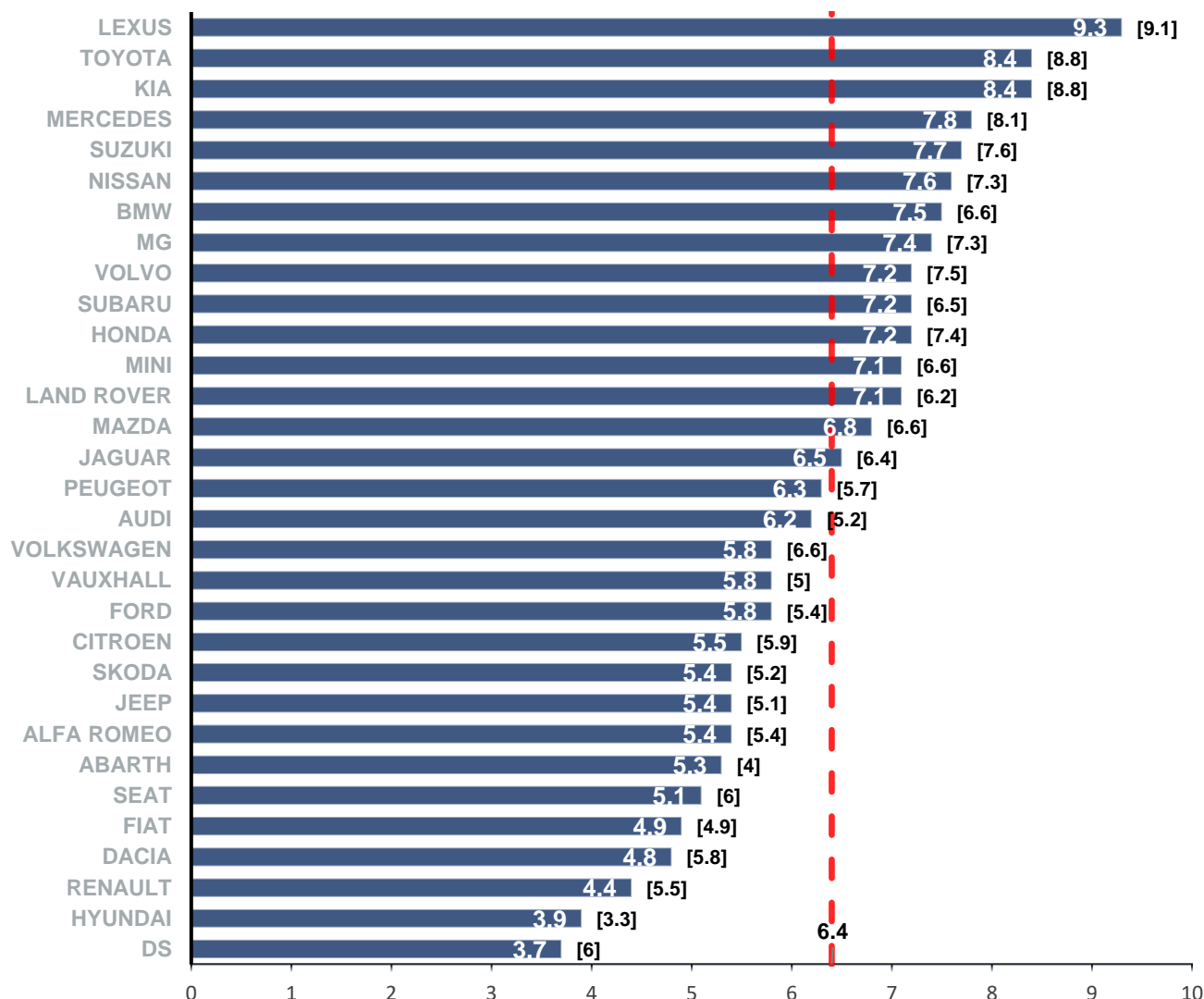
<b>Biggest improvement:</b>	Abarth	+1.3 points
<b>Largest decline:</b>	DS	-1.8 points
<b>Average score:</b>		6.9 points
<b>Previous average:</b>		6.9 points

### Summary

Retailers continued to show high satisfaction levels with the quality of their manufacturers' training with the average score remaining at 6.9 points, up by 0.1 points from last winter. There were 31 responses above 5.0. 15 scores improved, while 17 experienced a reduction in their level of satisfaction.

## Training

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



**Biggest improvement:** Abarth +1.3 points

**Largest decline:** DS -2.3 points

**Average score:** 6.4 points

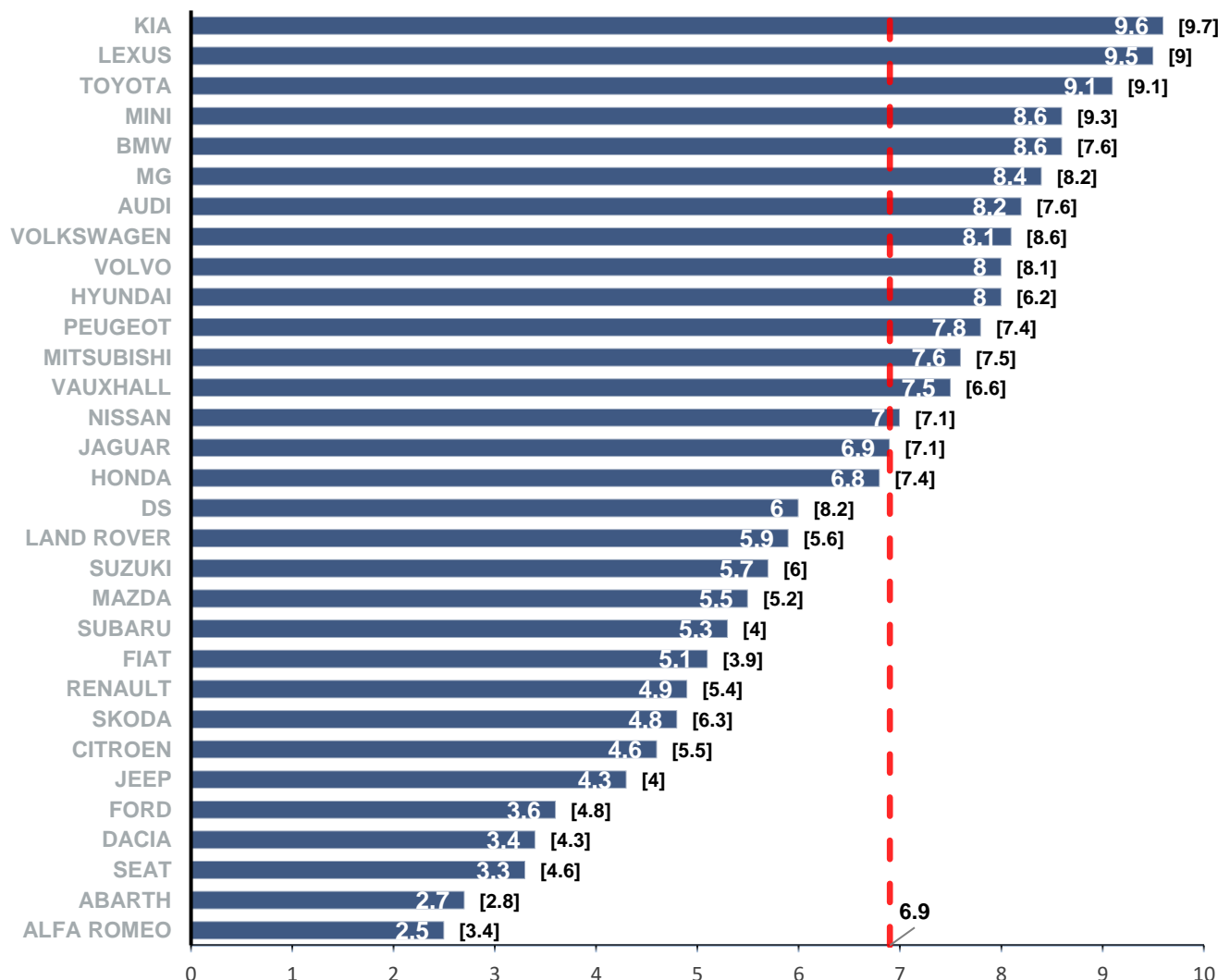
**Previous average:** 6.3 points

### Summary

Average dealers' satisfaction levels with the cost of their manufacturers' training (6.4) saw a 0.1-point uplift from six months ago. 18 dealer networks increased their scores from the previous edition of the survey, whilst 11 decreased and 2 remained constant; 26 scores were above 5.0 points.

## Future directions

How satisfied are you with your alternative fuel vehicle offering?



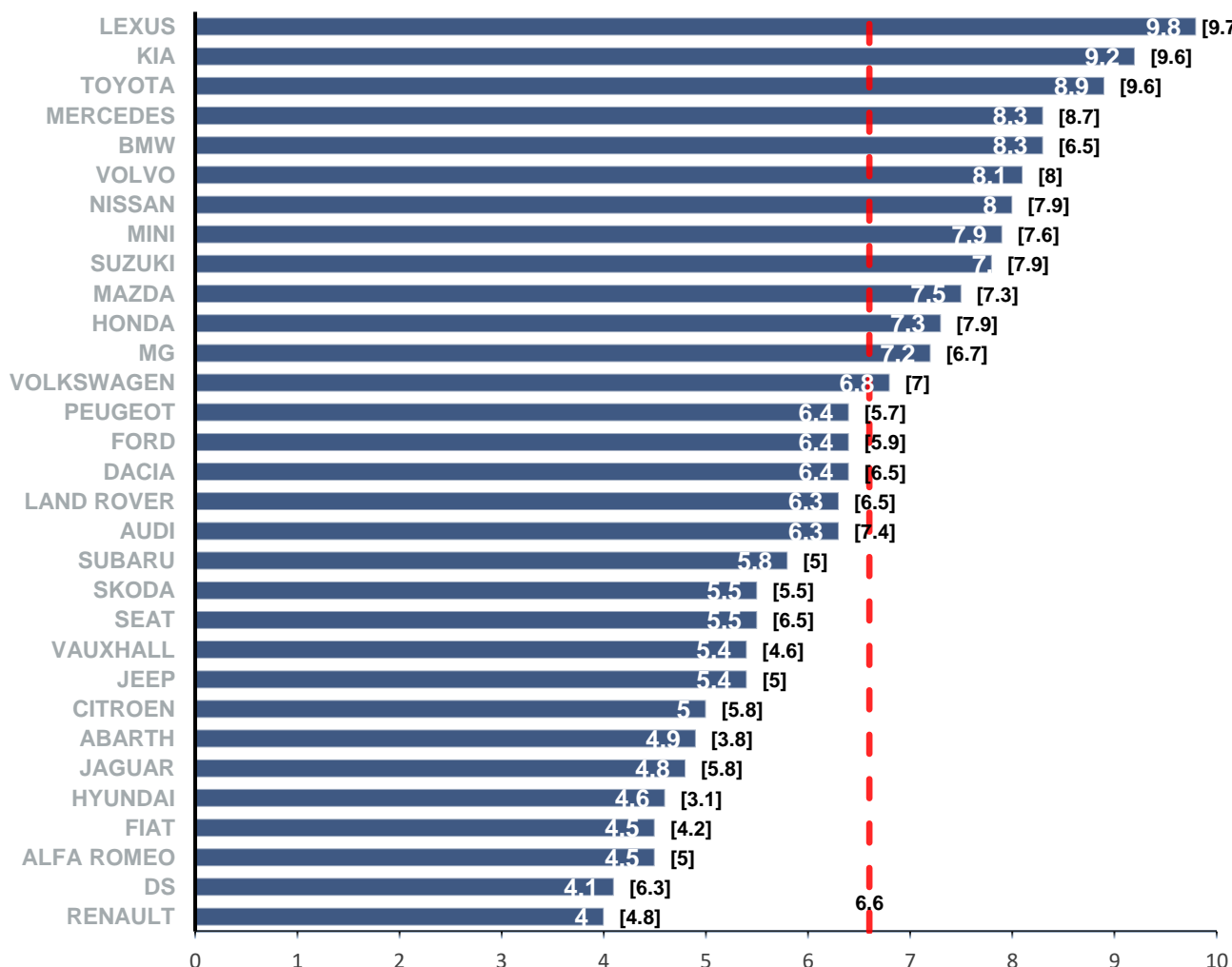
<b>Biggest improvement:</b>	Hyundai	+1.8 points
<b>Largest decline:</b>	DS	-2.2 points
<b>Average score:</b>		6.9 points
<b>Previous average:</b>		6.8 points

### Summary

The average dealers' satisfaction score with their brands' alternative fuel vehicle offering rose by 0.1 points, from 6.8 to 6.9. 22 were above the 5.0 mark. 13 responses increased from last year, 1 remained stable and 17 dropped.

## Overall scores

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



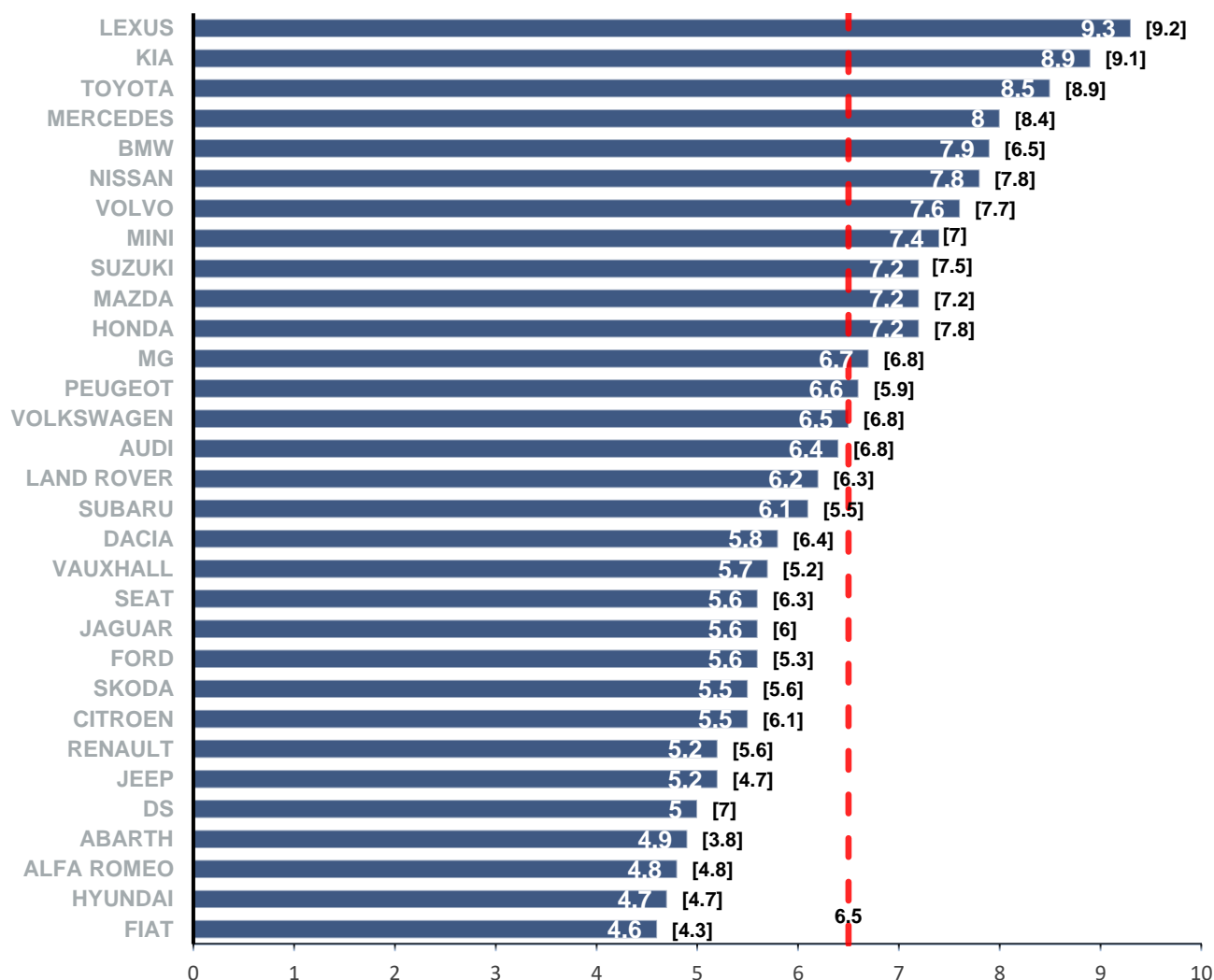
<b>Biggest improvement:</b>	BMW	+1.8 points
<b>Largest decline:</b>	DS	-2.2 points
<b>Average score:</b>		6.6 points
<b>Previous average:</b>		6.5 points

### Summary

The average score given to the key question ‘how would you rate your manufacturer overall?’ continued its upward trend, up by 0.1 points from the previous edition of the survey and by 0.3 points from last year. A total of 15 networks followed this increasing trend with 15 going the opposite way and 1 remaining constant; 23 responses had scores above 5.0 points.

## Overall scores

### Average score across all questions



<b>Biggest improvement:</b>	BMW	+1.4 points
<b>Largest decline:</b>	DS	-2.0 points
<b>Average score:</b>		6.5 points
<b>Previous average:</b>		6.3 points

### Summary

The average score across all questions of the survey provides an accurate overview of the overall performance of each manufacturer. Across the survey, there was a general increase of 0.2 points compared to six months ago, to an overall average of 6.5 points. A year ago, the average was 6.0; 13 scores increased from six months ago; while 18 decreased.



201 Great Portland Street, London, W1W 5AB  
T: 0207 5809 1222  
E: [nfda@rmif.co.uk](mailto:nfda@rmif.co.uk)  
[www.nfda-uk.co.uk](http://www.nfda-uk.co.uk)

