



Give a Shift - Roundtable Discussion

An anonymous & public discourse on the future of motorcycling

Thank you for your interest and time considering the future of the motorcycle industry. You are seeing the results of a wide-ranging discussion between individuals who truly care for the future of motorcycling and have donated their time and some money to work towards the betterment of the industry. There are no sponsors. The results and content are intended to be distributed gratis to anybody who wishes to also work towards a brighter future on two (and three) wheels. If there is continued interest we may host additional roundtable events in the future to further develop ideas and spur new ones that will help stem the losses and malaise surrounding the contemporary motorcycling market and culture.

Co-Authors and Roundtable participants (random order)

Marc Cook, Kent Kunitsugu, Porsche Taylor, Surj Gish, Sarah Lahalih, Guido Ebert, Xxxx Xxxxxx, Sarah Schilke, Charles Fleming, Kevin Duke, Glenn Hansen, Grady Pfeifer, Jayson Wickenkamp, Robert Pandya, Kevin Allen, Leah Misch, Jeff Herzog, Christa Neuhauser, Steve Piehl, Alisa Clickenger, Brian Klock, Eric Putter, Steve Squire, Monique Filips, Moira Zinn

GAS Roundtable Overview

This roundtable program is not presenting itself as the end-all-be-all or a strict directive regarding the future of motorcycling. We wish for the tone of this series to be one of constructive criticism. That is to be working towards a positive future for motorcycling, not just carping and negativity. It is designed to be a catalyst for further discussion within the industry, concerned motorcycle consumers and industry trade media, as well as within the quiet cubicles and conference rooms of OEMs, aftermarket brands and industries that also wish seek solutions of the future of motorcycling. It is a companion to efforts already being undertaken by industry organizations such as the [AMA](#), [MIC](#), OEM initiatives, [BRC](#), and other well-intentioned groups, but is intended to be reflective of a more “boots on the ground” position. Our focus in this meeting is on improving the motorcycle category in the next three years with an enthusiastic honest voice, backed by experience and creativity.

The negative or flat trends in motorcycling have been present since 2009. While there has been some industry discourse regarding these issues, including CEO-level presentations at trade events etc, the conversation has been largely siloed within respective brands, largely publicly un-addressed by the AMA and to a members-only groups by the MIC. It's the mission of the GAS Roundtable to bring together frustrated industry experts, outliers, and experienced enthusiasts to

learn and propose some actionable tactics for those who wish to increase interest and sales in motorcycling and who seek a new perspective or do not have access to inside industry information or a chance to speak directly to experienced and educated perspectives. Future events may be dealer-focused, wholly female-focused, millennial-based, bring in additional retail experts, and will maintain the same formula of unattributed transcripts and optional full anonymity to allow for true constructive criticism.

This report is reflective of the full transcript from the first meeting that occurred on Nov 16th as many in the industry were coming to Long Beach, CA for what was a well-attended and largely positive International Motorcycle Shows consumer event. The transcript is unattributed and was not altered other than to ensure anonymity for participants or for clarity of the point being made.

It is worth noting that seven of the twenty-five participants in the round-table were female, with several having executive or managerial experience in the industry. Each person attending the roundtable was asked if they wished to be named as equal co-authors of this summary report, and all but one of those attending chose to do so. It's important to note that all individuals were representing themselves and their experience and perspectives as professionals and enthusiasts in motorcycling. Several additional applicants to the round table could not fit due to the size of the donated meeting area, and the time allotted. We are encouraged by the number and variety of individuals who wish to be part of this conversation, and it's indicative of the desperate need to have public discourse on the future of motorcycling.

Please make special note: participants were NOT representing companies that they have worked for, or currently are employed by, and all volunteered their time.

It is also important to note that there is clearly no silver bullet that will "save" our industry. The up-side to our discussions is that there are many small acts that in combination can increase the positive visibility, the future desirability, and infrastructure integration of motorcycling. These efforts can work individually, however, it was recognized that success in this industry comes much faster when all parties involved choose to work together to elevate key initiatives. In other words, this industry will rise and fall together.

Give a Shift Focus Points: Major issues to address in the coming three years

- 1. Products won't address a general desirability problem**
- 2. Motorcycles can get eliminated in an autonomous vehicle future**
- 3. Mothers and female ridership increase is critical, but real action is needed**
- 4. Motorcyclists and industry must relentlessly self-promote to survive**
- 5. Improvements in the dealership experience is desperately needed**

1) **We do not have a product problem. We have a desirability problem.**

While there are those who point out that there has never been a more compelling and interesting time in motorcycling, including a wide product variety across all brands, the chorus coming from the survey and at several times in the discussion was access to more models at lower prices as a key to increasing interest. There is a pattern where OEM's, media and sales floor staff get exuberant about the highest performance (and often priced) models, and lose sight of the importance of more approachable products that are less intimidating and will increase ridership.

However even with a strong variety of dual-sport, street-sport, scooters and cruiser models being introduced by OEMs, it's clear to the panel that the bigger issue is the lack of general interest for riding. It is absent or has been stifled from youth. Distracted driving, on-road safety fears, and a still fiscally compressed middle-class Generation X and Boomers are impediments that keep targeted new riders out of the market. It was pointed out that while there was an inherent draw to riding from those who seek adventure, the reality of low-income, difficult credit access, holistic cost of entry (including safety gear and training) conspire to reduce consideration by younger demographics. The overwhelming detractor is safety concerns from potential customers and their parents.

Motorcycles still deliver freedom and adventure, mobility and a unique version of economy. However, at the millennial end of the transportation spectrum, benefits are overshadowed by student debt, safety concerns, and unsupportive or disinterested peers. Less-expensive motorcycles may help draw in some riders, however MSRP is not the only issue. Until there is a significant shift in the acceptance of motorcycling risk vs. reward, there will be slim chance to change the trajectory of millennial interest. Millennials often see property ownership as a burden, a career not as a lifelong single path but one with steps and breaks, and have redefined group participation to include online activities. This demographic thinks and acts differently from prior generations. The industry must break out of its patterns and educate itself on this market before preaching to it or using the same tired tactics.

Likewise the industry's focus on Boomers in the prior decades has taken focus off of Generation X, the cross-over generation that grew up analogue but introduced the world to the internet and mobile working. A large number of young Gen X-ers (appx 52-45 year olds) are able to work remotely and are re-incorporating outdoor adventure into their lives, with a significant indicator being the increase in recreational vehicle sales to 40-50 year olds. In addition, technology has given rise to a mobile lifestyle such as the #vanlife and remote working movement. Both of these situations indicate an opportunity for electric bicycles, e-cycles, and traditional small motorcycles that can be a catalyst for Gen X and their offspring to choose to ride, or promoting motorcycling as another addition to their self-defined lifestyle.

Retention of Boomers will continue to be a significant mission for the industry in the next decade, despite the fact that they are aging out. In the short term, the broad active adoption of three-wheel vehicles that help allay the fear of tipping over is important. Traditional sidecars and trikes are being quickly eclipsed by roadsters and reverse trikes newly available on the market. The traditional definition of motorcycles being only two-wheel conveyances is a significant alba-

tross to increased retail attention. Adoption of the three-wheeled variants of products into our culture, dealerships, events and media will keep this important transportation category within the purview of powersports, and not let them escape into their own category where profits to our industry would be lost. This transition was successfully accomplished in the ORV segment with the rapid inclusion of Side by Side (or UTV) vehicles that now account for a significant portion of powersports profitability. The same rigor and positive energy must be applied to the 3-wheelers in the on-road side of our business despite traditionalists who may bemoan their inclusion.

Likewise, it is increasingly critical for electric motorcycles to find a comfortable home within our business. Electric bicycles are quickly evolving into very capable vehicles that eclipse the on-road performance of small scooters and mopeds, and deliver a comfortable and familiar form-factor to non-motorcyclists. They are relatively unregulated, unlicensed, and becoming far more acceptable in increasingly dense urban and suburban population centers. With the global scale of the bicycle industry, there will undoubtedly be stiffer competition and rapid increases in technology and reduction in costs, especially as battery technology breaks through and costs lower. However, if moto-branded and treated as a part of our community (as traditional mopeds once were) their growth can increase motorcycling participation as riding radius is increased.

2) Do motorcycles even fit into the coming world of autonomous vehicles?

There is an undeniable trend toward the adoption of autonomous transportation. Do motorcycles even fit into that mix? As this technology grows, contemporary motorcycles will be even further elevated into higher risk categories in the eyes of traffic systems technologies, insurance companies, city planners and autonomous vehicle manufacturers who currently own and direct the conversation.

There is a very real risk of motorcycles being completely cut out of the conversation for future vehicle infrastructure systems, suffer for increasing costs of insurance programs, and squeezed out of local and national transportation planning all together. We already face issues with parking in many metropolitan areas (it was noted that downtown Minneapolis only has two parking ramps that even allow motorcycles) that do not accommodate motorcycles or force them to use full car spaces, which is inefficient, stigmatizes riders and has a negative perception with non-riders. Our voice in city planning must be amplified to be seen as part of the solution.

Vocal and engaged representation in Vehicle to Vehicle (V2V) and Vehicle to Infrastructure (V2I) systems must be maintained and leveraged. It is well known in Washington D.C. that the motorcycle community is one that will make its presence known through legislative efforts. [AMA](#), [ABATE](#), [BRC](#), [Rolling Thunder](#), [MRF](#) and many other representatives for motorcycles at large keep our presence percolating to the point that it was leveraged for attention on the recent European beef ban. However the same collective voice does not have strength in the coming technology revolution that can quickly cut out motorcycling altogether, particularly in urban environments where the benefit of single-person transportation can be easily evangelized and integrated.

Positioning motorcycling, scooterists, low-speed electric motorcycles/bicycles as part of the solution for increasing population density and environmental issues is an important factor for planning, and the promotion of our industry will need our voice. As a community we must adopt

the inclusion of technology on our own machines or apparel that includes our signal into the traffic matrix. With that technology smart vehicles will register our presence and will deliver to motorcyclists the safety that the technology promises the automotive community. Soon “loud pipes save lives” can be replaced with “You won’t get hit by a car if you’re on their radar.”

The panel feels strongly that the single biggest threat to motorcycling overall (particularly in urban and higher density environments) will be the incompatibility between autonomous vehicles and existing motorcycles. A lack of vocal participation in this conversation will forfeit our ability to speak up as technology further pushes self-operated vehicles out of the transportation matrix, and not build the needed attention from the rider base. We cannot afford to wait to be seen.

3) If women and mom ride, the kids will ride

This critical take-away came out of the often repeated conversation of getting more women onto motorcycles as riders or passengers (co-riders is more appropriate). The panel has heard many times over the years about the opportunity to attract increased female ridership but expressed frustration that seemingly little of consequence has actually been done in a consistent industry initiative. Where there have been some changes in attitudes and display of female ridership, events such as Babes Ride Out and all-female training and touring programs have blossomed without significant industry support or promotion. There is clearly a path to attract female ridership that does not come from traditional motorcycle marketing and must be explored. The increase in female ridership will have a huge influence on young riders access to motorcycling, a much-needed segment for motorcycling to thrive.

The growing economic strength and independence of females in motorcycling is an enticing data point for OEMs. However, some low-energy attitudes and the lack of support from a few OEM’s and the aftermarket (though there are in fact some doing great work in this arena) show themselves in the tired “shrink it and pink it” approach to apparel design, as well as sales-limiting assumptions about the type of motorcycles and performance capabilities that are desired by women. Likewise, the draw that female riders have to each other is seldom given the same respect and financial support that male initiatives receive. Often seen as passengers or part of a family group, many dealerships and OEM’s lack in developing effective and resilient marketing to attract female riders.

Critically for the motorcycle industry, there are few examples of women in decision-making executive leadership roles in our industry, despite the opportunity for female uptick being single best chance for growth in sales in the next three years. Female leadership, opinions and initiatives continue to be squashed despite the lip-service from current OEM leadership and advocacy groups. Without delivering the respect and opportunities needed, the issue will persist to the continued detriment of motorcycling overall.

Support for female ridership through programs such as [H-D’s “Garage Party” events](#), (Apparently now a [cancelled](#) program) female-oriented moto-orientation programs, [female-only or couple-centric rider training initiatives](#), projection of females as active riders and not just eye candy for the sport, were brought up. The hypocrisy of the “Start Girl” at motocross races or grid girls at road races that tout family-friendly entertainment and a desire to bring women into mo-

motorcycling was mentioned. Family riding opportunities certainly exist outside of the traditional image of the male in the family being the catalyst for family ridership. Safety, training and appropriate attitudes are exemplified by the USMCA and were directly supported by many attending the session. The [USMCA](#) initiative will help create rider bases for years to come, but it has yet to be fully promoted and adopted by many OEMs and the aftermarket who can benefit directly from the work to align with vetted instructors and a modern curriculum.

There is significant female interest towards more three-wheeled options that eliminate the possibility of a simple tip-over as seen in high female ridership of [Can-Am Spyders](#). Children will take their cues from their parents, and the headline statement in this section was echoed in the panel. While males are the traditional catalyst for riding, extending that influence to females will vastly improve the acceptance and expansion of ridership. The opportunity to make motorcycle training more interesting and family-inclusive while upping the entertainment value of the event exists but has yet to be promoted.

4) We must relentlessly self-promote

The broad riding public has been largely shielded from the downward trends in motorcycling. They may have become accustomed to the lower numbers of riders on the streets, smaller outdoor events and shrinking off-season consumer show schedules and displays. While some of the malaise in the industry can be attributed to constantly pulling from the same enthusiast base without replenishment, the approach has been one of being *sold to*, rather than to ask enthusiasts to help sell. That is to say to find a common language and message that all riders can lean on to introduce new riders to the sport. If just 20% of current riders were able to bring a new rider into the mix every year, the shift would be dramatic not only in sales, but also in camaraderie. So-called “buddy programs” have happened in the past, but staccato programs will not be as effective as a consistent message across the enthusiast base.

The panel discussed the opportunity for every motorcyclist to become a categorical ambassador. To work to be inclusive of smaller motorcycles and scooters, not big bike snobs who look down on smaller bike riders. Equally there were stories of singular acts that created community motorcycling events that not only elevated the political position for motorcycling, but resulted in a strong financial upswing for communities and dealerships that then sought out additional events.

Speaking up when we see other riders acting in ways that build a negative impression of motorcycling is highly recommended. As riders, we inherently might understand when a rider is acting out, making excessive noise, or “weaponizing” their motorcycle in public, but these actions diminish the perception of motorcycling to the 95% of the population that do not ride. The same can be said of many enthusiast-based businesses, such as skateboarding, bicycles, sports fans, etc - with those industries working hard to shift negative perceptions from the general public.

Motorcycling has an opportunity to build a simple guideline for riders to help improve awareness and a duty to call out those who negatively impact motorcycling. Printed versions of these guidelines can easily be added to OEM PDI kits, dealerships and club rules to become a mantra that will live in riders’ minds. Online videos with key spokespeople and celebrities can

both elevate the visibility of riding and help mitigate negative behaviors that serve only to compress the market. It's acknowledged that the cynical among us will write off this effort. If your first reaction was "nobody will see it, so why care?" - *you*, dear reader, may be part of the industry problem! It might take more work to put actions behind words, but the time is now.

The same under-funded and tired approaches to creating mentors and ambassadors will not work. New approaches such as brand-neutral "new rider" websites, channels and media that tell stories of ridership, adventure, and approach safety and training in a more modern and engaging manner. Opportunities exist with the AMA, [International Motorcycle Shows](#) and outdoor events.

A meeting attendee has since started a humble #AskMeAboutMotorcycles and #AskMeAboutScooters campaign on his personal social media that has already initiated a conversation and planned visit to a local dealership for an previously on-the-fence potential rider. Expanding this or similar initiatives industry-wide can address the need nationally or in a localized manner. A template for such mentorship will make such actions easy to emulate and empower existing enthusiasts to become categorical ambassadors - many who simply need guidance to start.

5) Dealership experience is significantly impacting new ridership

Most current motorcycle dealerships are a far cry from the modern retail presentation that current consumers are used to. While the sea of headlights and handlebars may excite existing enthusiasts, the same sight is intimidating and confusing to new riders. If you are the average guy, go try to buy the perfect shade of red lipstick for a girlfriend or mate, and you would likely share the stress. One roundtable attendee has considerable experience hosting group events at dealerships and noted that many dealers simply do not "get it" and do not engage with a new category of riders (in this case typically minority female sportbike enthusiasts). Another with significant OEM experience echoed the sentiment.

We may be at a crossroads where "old-school salesmanship" is a dying art, and the adoption of modern retail technique is far too slow for the current dealership model. The variety and types of motorcycle products on the market is compelling and diverse with many subsets of styles and technology. However the same crowded sales floor can create an overload to new riders where the same variety leads to a paralysis of sorts. Being enchanted by motorcycling can quickly be dulled by a poor, confusing, or dismissive dealership experience.

There exists an opportunity for a different kind of dealer model, in particular for the middleweight and smaller motorcycles that show so much promise for the entry-level stage of the market. However, the imbedded mindset that smaller displacement motorcycles are just "step up" models that are quickly dismissed in the process of becoming a "real motorcyclist" with larger motorcycles is also an impediment to the overall volume of riders entering the category. For many riders, smaller-displacement motorcycles may be their end goal or prove to be enough "transportainment" to keep that rider happy for years. Increased complexity and features are not a draw for many riders, however, integrated technologies such as automatic transmissions, traction control, automatic clutch, ABS and adjustable throttle response are well received by riders who expect these safety and convenience features to be standard.

More immediate solutions that precede dealer sales discussions and turn prospects into more educated walk-in customers could be significantly increased via online training videos that

lean on the fun of riding over a barrage of safety messaging and present easier-to-approach motorcycles in a manner consistent with modern sales methods. Reduction in product overlaps would help new riders understand motorcycle segments and easier self-identify what “type” of rider they are.

It was noted that the current rigid style of rider training often completely dissolves the fun factor from riding, often just at the point that new riders want to be engaged in a way that validates the entertainment of riding. Speakers at the recent MIC Symposium reportedly noted that some students’ desire to ride was squashed by the training experience, not enhanced or inspired by it - a feeling reflected in our panel.

“Pre-training” initiatives that leverage the fun of riding and set the hook deeper can soften the training process and further the appreciation of riding motorcycles. In many markets there are possibilities of shifting training models to become more of a destination experience, such as a camping / riding initiative, urban training centers, alignment with major events or epic photography journeys whereby exposure to simple motorcycles can become an integral part of a bigger experience, not the sole end goal. Such efforts align with simple to operate motorcycles such as electric single-speed units, automatic transmission scooters and small motorcycles. These efforts when aligned to a regional dealer group, OEM joint effort or synchronized with a strong brand experience, will pull customer deeper into the funnel and closer to being turn-key customers that walking into most dealerships as a new rider.

Automotive sales models do not always work with an enthusiast or transportation product. Where some in past generations had a sense they “needed” a motorcycle in their lives, as one would need a car in most of North America, the current market requires customers to want the product to justify the sale - much in the same way consumer electronics are sold. Building the “want” remains our most significant general challenge, and no matter the improvements of marketing, training, product features, celebrity, exposure, and integration into infrastructure, it can all quickly fall apart at the dealer level if the experience and staff training does not measure up.

The dealer environment is a highly complex, costly, transient, attention-fracturing and expensive business to be in these days. Dealers must align on categorical needs, consistent language and push OEMs to deliver the tools they need not only reflective of individual brand attributes, but in the light of a modern consumers reduced brand loyalty, overly emphasized safety concerns and regulatory compression. Dealers cannot be solely blamed for the current malaise because current retail and franchise laws regarding transportation products are a critical choke point for increased sales. Though there is some promise in recent [trade show attendance](#), there is still a strong need for an independent dealer association. There still lies considerable opportunity to improve customer interaction and significantly affect an upturn in motorcycle sales.

Conclusion for GAS Round Table 1

It will be through a myriad of efforts that motorcycling can be protected within transportation, promoted as a desirable activity, draw in safety-conscious customers and ultimately sell more units, sustain an aftermarket, and deliver the positive attributes of the motorcycle culture to a wider audience. There is precious little time before new technology, industry stagnation and lack of sales and marketing evolution will cause motorcycling to implode into a sideline hobby.

There must be continued self-critical public conversation that inspires new efforts, mentoring, learning, and processes so we can inject energy into a category that we all understand can be very rewarding. More riders must Give a Shift.

Motorcycling can no longer be our secret, it must adjust or it will soon fade altogether.

Special thanks to all those who took the time to complete surveys and especially the panelists who donated their time and energies. Panelists Guido Ebert, XXXX XXXXXX, Glenn Hansen and Kevin Duke greatly assisted in editing this report. **This report is NOT confidential, and we hope that it and the associated documents are shared with anybody who wishes to contribute towards a positive future for motorcycling.**

See you down the road -

Give a Shift Report Contact:

Robert Pandya

RobertPandya@gmail.com

(512) 630-3960 cell



Give a Shift points of attack

Specific tactics for shifting motorcycling trends in the next three years.

As previously stated, there is no silver bullet to fix motorcycling. There never has been, and there are none below. However, presented is an expanded list of some tactics that can be adopted by a variety of entities and individuals in the industry within the next three years that can positively affect the state of the industry, sales, and increase future consideration. Please consider how you as an enthusiast, dealer, mentor, ambassador or brand representative can adopt some of these initiatives in your future work to promote a healthier motorcycling future.

- 1) Distribute a code of enthusiasm for existing riders as an advocacy force.
 - a) Outline how our behavior can help promote ridership.
 - b) Outline how our behaviors might reduce motorcycling interest or create external barriers.
 - c) Offer gratis printed material and a website with brand neutral guidance and videos
- 2) Elevate female ridership through active support of female-led initiatives.
 - a) Note that the female riding community may grow without active support, but it will do so only at an organic rate. To have an accelerative effect sales, authentic female-led initiatives are required.
- 3) Build a coalition of OEMs or dealers to promote motorcycle parking in high density areas
 - a) Start with college campuses to concurrently promote ridership, then expand to citywide or state-wide programs.
 - b) Keep the program consistent to allow for easy understanding from location to location.
- 4) Build programs and support opportunities for increased family riding through group training programs that combine lifestyle activities such as camping or outdoors activity.
- 5) Address ownership concerns through focused attention on easing sales and clearly understood maintenance programs. Support independent workshop and group garage initiatives.
 - a) Major regional opportunity is a “MotoMax” used motorcycle dealership that can be modeled on the CarMax business. Fixed pricing, easy return and exchange, and guaranteed trade-in and quality combined with rider training and apparel retail.

6) Actively adopt three-wheel products into the motorcycle category and promote them as alternative powersports products. Position them in promotions that attract both Boomers and new-to-the-category Gen X-ers. Promote and subsidize rental opportunities to expand product reach.

7) Align with RV dealerships and marketing initiatives to promote lightweight models as an accessory to the mobile lifestyle.

8) Encourage and embrace category ambassadors through a #askmeaboutmotorcycles campaign tied in with local motorcycle shows and ambassadors.

9) Encourage existing licensed or experienced riders to bring at least one new or return rider into the category per year. We are our own best sales people. A simple cross-OEM and industry campaign to “bring a buddy” combined with a sales guide for consistent language. #RideWithMe is suggested

10) De-emphasize All The Gear All The Time (ATGATT) until later in the conversation with new riders. The need for the gear will be still there and riders will follow through, however, too early a discussion can distract and overwhelm a new rider.

a) Continuously promote the fun of riding through new on-boarding processes of bringing in new riders.

11) Promote initiatives for existing motorcycle fans to seed the next generation of riders by gifting motorcycle-related toys and gifts for the holidays. #GiftAShift for the holidays.

12) Promote a categorical “spring cleaning” campaign that speaks to one’s mental state and the need to get outside via motorcycling.

13) Increase the access and distribution of industry data and information through AMA / MIC channels in order to maintain their relevancy to the market and elevate industry quality.

14) Words Matter: Stop use of the phrase “Lane Splitting” and switch to “Lane Sharing” in all instances - non-riders and legislators will be more accepting.

15) Many typical moto retail environments are too cluttered for new riders, with a perception there are too many options. Take a chapter from big retail and in the right markets create a clean and efficient modern presentation for entry-level and middle-weight bikes with staff who know how to (and like to) speak to new riders.

16) The women’s market will remain elusive until women are no longer treated as sex objects, but as human beings. (Examples are umbrella girls and MX racing product models). The motorcycle industry must walk away from this tradition to make progress in the future.

17) Help encourage development of E-bike closed-course experience centers in urban environments on unused lots or in large buildings no longer suitable for regular businesses to expose potential riders to the benefits of motorcycling.

18) Work more to create online portals for complete newbies, and consistently direct them to that site.

19) Stop “weaponizing” motorcycles and how you ride them. Explain to aggressive riders that by riding like a-holes, they are creating more people who have a negative feeling about all riders.

Key issues as brought up via 25 participant introductions

These items were brought up by individuals as we went through introductions. They are not all addressed in the attached report, however we thought that their inclusion would help show what was top of mind for the panel, and likely reflects significant issues and opinions held by others in the industry as well. These points should be read as individual opinions of the panelists.

Marketing Communication:

1. Promote motorcycling as an activity for everyone and work to reduce negative stereotypes and video portrayal online.
2. Reduce trepidation of riding from women who have tremendous influence in the decisions of other people.
3. Riders from ethnic minorities have not been smartly and directly addressed in a broad manner.
4. We have failed to tell a compelling story about the benefits and joys of motorcycling to new customers.
5. Motorcycles are often seen by non-riders as “noisy, dirty and dangerous.” We must recognize how we are perceived and balance how the exact same attributes can be a draw for new riders.
6. Greatly affect acceptance of the positive attributes of motorcycling.
7. One participant noted that some 85% of household financial decisions are made by women in the family. Women, particularly mothers with impressionable kids, need to understand and embrace the many benefits of riding.
8. The same approach to motorcycling as in the past will not work to propel new ridership. An example stated was that, for some kids, watching a video counts as participation.
9. We need to find expression of modern cool through new perspectives as younger generations look into motorcycling.
10. College students need to be shown the opportunity for freedom and self-expression when astride a motorcycle.

Internal Discussion:

1. Long-term decline of the industry must be publicly discussed and avoid being stuck in old business models and practices. It's high time for new perspectives and techniques.
2. The conversation about bringing women into the sport has been talked about by the industry for decades, and it's past time for real action to deliver on the opportunity.
3. Additional women in the marketplace will not displace traditional consumers from the category but have the potential to make it grow exponentially.
4. The industry cannot lose sight of the fact that general consumers see our work as being the best job in the world and enjoy the fantasy of what it is to be inside motorcycling, so look to us for solutions and like to be engaged.

5. Manufacturers can't bear sole responsibility of bringing in new customers, these initiatives have to be embraced at all levels .

6. Understand that the aftermarket is suffering as badly as OEMs and must act as partners in the growth of the industry. Successes for OEM and the aftermarket will holistically elevate motorcycling.

7. Younger generations still have interest in operating a vehicle, but they suffer waning interest in owning a vehicle (car *or* motorcycle).

8. Dealers are a significant issue in the chain of retail. Dealers still often do not know how to sell to women, couples, families, and non-traditional customers in general even though they work hard to get local door swings.

9. The industry must see itself as part of the problem and be self-critical. We must stop being exclusive and become more welcoming to all forms of ridership.

10. Motorcycle tourism resonates with state agencies and non-endemic travel groups, inspiring people to not just witness their trip, but to immerse in that trip and share it publicly.

11. The current situation in motorcycling is a new one compared to historical downturns, so new approaches to retail and categorical acceptance are required.

12. One solution to upturn the industry is to begin to engage potential riders one to one and take responsibility for growth individually. We all should become personal evangelists for motorcycling.

13. Fear of being "uncomfortable" sits on the surface with many younger riders. Reducing perceived discomforts (which includes emotionally, socially, financially or physically) will be a key to increasing desirability.

14. Promote seeding children with quality motorcycling toys, bicycles, e-cycles, activities and products that ignite their motorcycling imagination - especially around holiday season.

15. Acknowledge that only 2-3% of new autos have a stick shift, thus our industry must embrace automatic transmissions in motorcycling to reduce that barrier to entry.

16. Turning our backs to three-wheeled vehicles is a myopic move that does not reflect the widespread acceptance and profitability of the SxS market in the ORV class.

17. The industry can't lose sight of Generation X, many of which are in an ideal position to adopt some form of motorcycling into their lives as they send kids to college and enjoy their second youth (new empty-nesters).

18. There is a disconnect in messaging when targeting the generation (Gen Y) that was "bubble wrapped" for safety in their youth.

19. The nature of how motorcycles fit into the rapidly evolving transportation system must be aggressively addressed and include work done by the AMA / MIC already.

20. Increasing incentives for riding (parking, access, included training) will draw in more riders. Current enthusiasts can help elevate these conversations locally.

21. The safety paradigm needs to change, including tiered licensing, lane sharing, mandatory training and helmet laws. Traction in some states will help other states shift their perspective also.

22. Rider error is still the primary issue with on-road injuries, despite riders tendency to blame car drivers. Rider education and training must be elevated to reduce injury and retain ridership.

Other input that challenges the industry leaders:

1. The traditional group bond that naturally happens in motorcycling has not been adequately translated into the modern culture. It will take concerted effort to better understand and communicate with new audiences.
2. Employees at all levels of powersports need to renew innovation and their own energy in their jobs and will likely promote ideas that seem uncomfortable, different, or may not offer immediate returns. A more broad marketing perspective is needed.
3. Slow adaption of the industry to new retail and transportation trends adding to the feeling that our industry is outdated to the modern era.

Give a Shift Report Contact:

Robert Pandya

RobertPandya@gmail.com

(512) 630-3960 cell