

UK Adventure Motorcycle Market Intelligence Report: Pre-Launch Analysis for BMW R 12 G/S (January-March 2025)

Executive Summary

The UK adventure motorcycle market experienced a significant downturn in the first quarter of 2025, with overall registrations declining by 25.8% compared to the previous year. This contraction was largely an artificial market correction, resulting from a surge in pre-registrations in late 2024 to clear Euro 5+ non-compliant stock. Despite this challenging environment, BMW Motorrad demonstrated relative strength, gaining two positions to secure second place in overall manufacturer sales, indicating robust brand loyalty and effective product strategy.

Within the adventure segment, a notable trend emerged: while the overall category saw a substantial decline of 29%, the 'Modern Classic' segment, which shares stylistic elements with heritage bikes, showed remarkable resilience with a much smaller decline of 9.8%. This suggests a strong underlying consumer appetite for retro-styled motorcycles. Key competitors such as Yamaha, KTM, and Ducati are actively leveraging heritage and rally aesthetics in their 2025 adventure model offerings, validating this market trend.

Pre-launch discussions surrounding the BMW R 12 G/S on enthusiast forums revealed high anticipation for a new heritage-styled BMW adventure bike. However, initial community reactions to leaked specifications highlighted critical tension points, particularly concerning the 229 kg wet weight and the 15.5-liter fuel tank. These specifications led to questions about the bike's "lightweight" claim and its practical utility for extended adventure touring, with some users expressing concern that it might be perceived as an "Urban GS poser machine."

For BMW Motorrad, these findings underscore several strategic imperatives. The R 12 G/S launch is well-timed to capitalize on the resilient heritage segment. However, clear communication is essential to define the bike's precise niche within the broader GS

family, proactively addressing concerns about range and weight by emphasizing its "puristic off-road fun" and agility for technical terrain. Leveraging its authentic R 80 G/S lineage, ensuring impeccable product quality, and preparing the dealer network for comprehensive customer engagement will be paramount for a successful market entry.

1. UK Motorcycle Market Overview (Q1 2025)

1.1. Overall Market Performance and Trends

The British motorcycle market experienced a challenging start to 2025, with overall registrations plummeting significantly in the first quarter. Total registrations in the UK were down 25.8% for Q1 2025 compared to the same period in 2024.¹ Monthly figures reveal a consistent decline: January saw a 30.5% drop, February a 32.3% decrease, and March a 22.1% reduction.¹ Overall two-wheeler sales for Q1 2025 amounted to 20,742 units, representing a deep decline of 25.7%.² By April 2025, year-to-date figures confirmed a 21.4% decrease, leading industry observers to characterize 2025 as a difficult year for the sector.²

This sales decline was more pronounced in the motorcycle segment, which experienced a 21.6% decrease, compared to the scooter segment's 20.7% drop.² Even the Electric Vehicles (EVs) segment, though smaller, was affected, with its loss contained within 3.7%.²

The sharp decline observed in Q1 2025 appears to be largely an artificial market correction rather than indicating a fundamental collapse in underlying consumer demand. This assessment is supported by the context of late 2024 sales figures. Registrations in December 2024 spiked dramatically by 114% year-on-year, contributing to a "very moderately positive" total for 2024.¹ This surge was directly correlated with dealers needing to register vehicles with old emission levels before the new Euro 5+ rules came into force.² Approximately 7,000 more bikes were registered in November and December 2024 than would have been expected without this regulatory change.¹ Conversely, around 7,000 fewer bikes were registered in January,

February, and March 2025 compared to the same period in 2024, effectively "levelling the situation".¹ This suggests a pull-forward of sales from Q1 2025 into Q4 2024, implying that while headline figures are alarming, the underlying market health might be more stable than the raw Q1 numbers alone suggest. This rebalancing market could present a more favorable environment for new product launches as the year progresses.

Table 1: UK Motorcycle Market Performance (Q1 2025 vs. Q1 2024)

Category / Period	Feb 2025 (Units)	Feb 2024 (Units)	% Change (Feb)	Q1 2025 YTD (Units)	Q1 2024 YTD (Units)	% Change (Q1 YTD)
Total Registrations	3,457	5,106	-32.3%	7,658	11,149	-31.3%
Total Motorcycles	3,215	4,794	-32.9%	7,151	10,450	-31.6%
Total Scooters	1,130	1,766	-36.0%	2,166	3,631	-40.3%
Electric Motorcycles	127	151	-15.9%	299	404	-26.0%
Adventure Category	533	834	-36.1%	1,267	1,963	-35.5%
Modern Classic Category	385	502	-23.3%	932	1,133	-17.7%

Source: ³

1.2. Economic and Regulatory Context

The broader economic environment in the UK in early 2025 presented a mixed picture.

Hopes for a significant surge in British economic growth were tempered by a slow end to the previous year and the looming threat of a global trade war.² However, beneath these headline concerns, the domestic economy exhibited a more positive performance, with consumer spending growing by approximately 0.6% in the latter half of 2024.² Headline inflation had risen to 3% in January 2025 and was projected to reach 3.5% by mid-year, largely driven by one-off factors and rising energy prices rather than strong domestically generated inflation.²

From a regulatory standpoint, significant changes came into effect on January 1, 2025, with the introduction of Euro 5+ (also known as Euro 5b) type-approval rules.¹ While pollutant limit values for motorcycles were retained, the more stringent requirement of proving the durability of exhaust gas aftertreatment systems, previously postponed from 2020, became mandatory under this new standard.² Concurrently, new noise measurement regulations (UNECE R41.05) also applied from the same date, requiring motorcycles to meet existing noise limits under a significantly wider range of operating conditions.²

These regulatory changes, while contributing to the short-term market disruption seen in Q1 2025 due to the clearance of non-compliant stock, also compel manufacturers to innovate and integrate more advanced technologies into their new product offerings. This means that new models launched post-January 2025, such as the BMW R 12 G/S, are inherently designed to meet these stricter standards, incorporating the latest engineering solutions for emissions and noise reduction. This allows manufacturers to position their new models not only on performance and design but also on their compliance with modern environmental and noise regulations, adding a layer of contemporary relevance to their appeal.

1.3. Adventure Segment Performance

The 'Adventure' motorcycle category experienced a substantial decline in the first quarter of 2025. In February 2025, registrations for adventure bikes dropped by 36.1% compared to the same period last year, with only 533 units registered.³ Year-to-date figures for the adventure segment showed a 35.5% decrease, totaling 1,267 units.⁴ Overall, adventure bike sales were down 29% in Q1 2025.¹ This performance was part of the broader market contraction influenced by the Euro 5+ pre-registration surge.

However, a contrasting trend emerged within the market that holds particular

relevance for heritage-styled motorcycles. The 'Modern Classic' segment, which encompasses "retro roadsters" like the Triumph Bonneville, demonstrated notable resilience. This category saw a significantly smaller decline of only 9.8% in Q1 2025.¹ Furthermore, the 'Modern Classic' segment was the fastest-growing category in 2024, experiencing an impressive 31.7% growth over the full year compared to 2023.¹

The relative resilience of the 'Modern Classic' segment points to a strong underlying consumer appetite for motorcycles that blend modern performance with nostalgic appeal. This market dynamic is highly pertinent to the BMW R 12 G/S, which is explicitly positioned as a "retro R1200 G/S bike with styling options that bring to mind the R80 G/S" ⁵ and "pays homage to the legendary BMW R 80 G/S of 1980".⁶ This direct alignment with a heritage aesthetic suggests that while the broader adventure segment is navigating a market rebalancing, the specific niche of heritage-styled bikes may exhibit more robust demand. This indicates that BMW's heritage positioning for the R 12 G/S is well-timed to tap into a resilient and growing niche, potentially mitigating some of the overall market headwinds and providing a strategic advantage at launch.

2. Competitive Landscape Analysis

2.1. Key Competitors and Market Share

In the first quarter of 2025, the UK motorcycle market saw shifts in competitive positioning amidst an overall sales decline. Honda maintained its leadership position, though its sales experienced a 16.7% decline.² Notably, BMW Motorrad demonstrated a strong relative performance, moving up two spots to secure second place in overall manufacturer sales, despite its own sales being down 18.0%.² This indicates that BMW's sales decline was less severe than many other major players, allowing it to gain market share in a contracting environment.

Triumph, despite a significant 32.8% loss in sales, managed to overtake Yamaha to claim third place.² Yamaha experienced the steepest decline among the top manufacturers, with sales down 42.5%.² Other key competitors also faced substantial

sales reductions in Q1 2025, including Kawasaki (-20.7%), Suzuki (-20.2%), Lexmoto (-36.6%), Royal Enfield (-35.7%), and Ducati (-16.8%).²

BMW's ability to gain market share in a declining market suggests strong brand loyalty and an effective product strategy, providing a solid foundation for the R 12 G/S launch. The less severe sales decline compared to many rivals indicates that BMW's existing product portfolio is resonating relatively well, or its customer base is more resilient to economic pressures. This positive competitive momentum offers a strong platform for the R 12 G/S, allowing BMW to leverage its established market position and perceived value to introduce a new model, potentially attracting customers from competitors experiencing sharper sales contractions.

Table 2: UK Motorcycle Manufacturer Sales Performance & Market Share (Q1 2025)

Manufacturer	Q1 2025 Sales (% Change vs Q1 2024)	Q1 2025 Market Share (Approx.)
Honda	-16.7%	Leader
BMW	-18.0%	2nd Place
Triumph	-32.8%	3rd Place
Yamaha	-42.5%	4th Place
Kawasaki	-20.7%	-
Suzuki	-20.2%	-
Lexmoto	-36.6%	-
Royal Enfield	-35.7%	-
Ducati	-16.8%	-

Source: ²

2.2. Top-Selling Adventure Models and Their Positioning

The UK market for big adventure bikes in 2025 features a strong lineup of established models and new iterations. The top 10 list includes the BMW R1300GSA, Ducati Multistrada V4 S, KTM 1390 Super Adventure S, Kawasaki Versys 1100, Ducati Desert X Discovery, Husqvarna Norden 901 Expedition, Honda CRF1100L Africa Twin, Triumph Tiger 1200 GT Pro, Suzuki V-Strom 1050, and Harley-Davidson Pan America 1250 S.⁷

Notably, BMW's R1300GSA, the all-new successor to the R1250GSA, is listed as the top adventure bike for 2025.⁷ This model is characterized by its larger 30-liter fuel tank, a more powerful 145bhp boxer twin engine, lighter overall weight, and upgraded electronics, including optional automatic ride height lowering and a new semi-automatic 'ASA' system.⁷ It is described as more powerful, sophisticated, nimble, and manageable than its predecessor.⁷

The continued dominance of BMW's R1300GSA, despite its premium positioning, indicates a strong market segment for high-end, feature-rich adventure touring motorcycles. This success establishes BMW's credibility and premium perception within the adventure segment, creating a positive halo effect for other BMW adventure offerings. The R 12 G/S, while targeting a different niche as a "retro enduro"⁸ with "slimmed down" basic equipment⁸, can indirectly benefit from this established reputation for capability and quality. It can be positioned as a complementary, more specialized, or "back-to-basics" premium adventure option within the successful GS family, appealing to a segment that values heritage and focused off-road capability.

2.3. Competitive Offerings: Features, Pricing, and Market Strategy

An examination of key competitor models reveals diverse strategies in features, pricing, and market positioning within the UK adventure segment:

- **Yamaha Ténéré 700 Rally:** Priced at £11,404.00, this model features a "unique heritage-inspired colour scheme with gold coloured wheels and Yamaha's iconic speed block design," specifically targeting a desert racer aesthetic.⁹ It is equipped with a YCC-T electronic throttle, Sport and Explorer ride modes, upgraded fully adjustable suspension, and off-road focused components like larger footpegs and a one-piece rally-style seat.¹⁰
- **Honda CRF1100L Africa Twin:** Starting from £13,249, with the Adventure Sports ES model at £17,649, the Africa Twin is renowned for its off-road capability, electronic suspension, and the intuitive optional Dual Clutch Transmission (DCT)

gearbox.⁷ The DCT system is praised for its smooth, instantaneous shifts and rev-matched downshifts in sport mode.¹¹

- **Ducati DesertX Discovery:** Priced at £17,295, this model emphasizes off-road prowess with its 21-inch front and 18-inch rear spoked wheels, 250mm ground clearance, and dedicated Enduro and Rally rider modes.⁷ Its design explicitly draws inspiration from the 1980s Cagiva Elephant, appealing to a retro aesthetic.⁷
- **KTM 890 Adventure R:** For 2025, this model retains its reputation as the "king of mid-weight adventure," engineered for "offroad excellence".¹³ Its new look is directly inspired by KTM's rally heritage, featuring WP XPLOR suspension and rally-style bodywork.¹³ Similarly, the 390 Adventure R leverages a "true rally-inspired design" and graphics "inspired by KTM's vast Rally racing heritage".¹⁴
- **Triumph Tiger 900 GT Pro:** Retailing at £13,895, this bike is widely praised for its practicality, comfort, and suitability for touring and road use.¹⁵ Owners describe it as a "superb bike. Light & agile; and at my age most importantly comfortable!".¹⁶

The active leveraging of heritage and rally aesthetics by multiple key competitors, particularly in the mid-weight segment, highlights a significant market trend. This widespread adoption of classic design elements and historical racing connections indicates a strong consumer preference for motorcycles that offer a blend of modern performance with a nostalgic or authentic backstory. This market dynamic positions the BMW R 12 G/S, with its direct homage to the legendary R 80 G/S from 1980 ⁶, to capitalize effectively on this trend. Its launch strategy can heavily emphasize this authentic heritage, providing a unique differentiator against competitors whose "heritage" might be more broadly defined or less directly linked to a specific iconic model.

Table 3: Key Competitor Models - Features, Pricing, and UK Availability (2025 Models)

Model Name	Engine Size	Power (bhp)	Torque (Nm/lb-ft)	Wet Weight (kg)	Starting Price (£)	Key Features & Positioning
BMW R1300GSA	1300cc	145	-	-	£18,780	Top-selling big adventure, 30L tank,

						advanced electronics, optional automatic ride height/ASA.
Ducati Multistrada V4 S	1158cc	170	-	-	£21,495	High-performance, sophisticated V4, radar, multiple riding modes, touring focus.
KTM 1390 Super Adventure S	1390cc	10bhp+ vs 1290	-	-	TBA	Enlarged V-twin, updated styling/chassis/electronics, rally-inspired.
Kawasaki Versys 1100	1099cc	133	-	-	£11,899	Road-only adventure tourer, smooth, comfortable, two-up touring focus.
Ducati Desert X Discovery	937cc	110	92 / 68	223	£17,295	Off-road capable, retro-inspired (Cagiva Elephant), 21"/18" wheels, high ground

						clearance.
Husqvarna Norden 901 Expedition	889cc	105	100 / 74	214	£14,599	Mid-weight, longer travel suspension, heated grips/seat, touring screen, based on KTM 890 Adventure .
Honda CRF1100L Africa Twin	1048cc	101	112 / 82.7	244	£13,249	Off-road capable, electronic suspension option, optional DCT gearbox, real-world adventure.
Triumph Tiger 1200 GT Pro	1160cc	148	130 / 96	246	£17,295	Superb all-rounder, shaft drive, advanced electronics, intoxicating three-cylinder character.
Suzuki V-Strom 1050	1037cc	-	-	-	£13,499	Simple, straightforward, effective, charming, affordable litre-class adventure.

Harley-Davidson Pan America 1250 S	1250cc	150	-	-	£15,995	Harley's entry into ADV, sophisticated V-twin, comfortable, handles well.
Yamaha Ténéré 700 Rally	689cc	72	-	-	£11,404	Heritage-inspired color scheme, YCC-T, adjustable suspension, off-road focused components.
KTM 890 Adventure R	889cc	-	-	210	-	King of mid-weight adventure, off-road excellence, rally heritage, WP XPLOR suspension.
KTM 390 Adventure R	399cc	44	39 / 28.7	165	£6,699	Heritage-styled, off-road capable mid-weight, rally-inspired design.

Source: ⁷

3. Social Listening & Consumer Conversation Analysis

3.1. Data Collection Sources and Methodology Overview

The social listening and consumer conversation analysis for the UK adventure motorcycle segment from January to March 2025 drew upon a diverse range of online sources to capture authentic rider sentiment and discussion themes. Primary sources included dedicated UK motorcycle forums such as UKGSer.com¹⁷ and AdventureBikeRider.com¹⁹, which provide granular discussions from active enthusiasts. Reddit communities, including r/Tenere700²⁰, r/HondaMotorcycles²², and r/motorcycles²⁴, offered peer-to-peer discussions and real-world user experiences.

UK motorcycle news and review sites were also extensively monitored. These included MCN (Motorcycle News)²⁶, Bennetts BikeSocial¹, Visordown²⁹, and Mad or Nomad³³, providing expert reviews, news, and insights into public commentary. YouTube channels focusing on adventure motorcycles, particularly UK-based creators such as Lavi and Ollie, and The Girl On a Bike³⁴, offered video reviews and community engagement through comments. Additionally, mentions of specific social media events and groups, such as the "Overland & Adventure Bike Day @ Ace Cafe" on March 30, 2025³⁵, provided further context on community gatherings and interests.

The methodology involved a qualitative analysis approach, focusing on identifying recurring themes, assessing sentiment (positive, negative, neutral), and pinpointing common pain points or highly praised features. This approach allowed for a nuanced understanding of consumer perceptions and priorities within the adventure motorcycle market during the specified timeframe, particularly where explicit dates for discussions were available. Based on this qualitative analysis, the following estimated percentages for discussion themes and overall sentiment have been derived.

3.2. Competitor Models: Theme Analysis and Sentiment

3.2.1. Yamaha Ténéré 700 Discussions

Discussions surrounding the 2025 Yamaha Ténéré 700 highlighted its new features, including the YCC-T electronic throttle, Sport and Explorer ride modes, adjustable suspension, and enhanced off-road components.¹⁰ Sentiment was mixed, with positive feedback for the bike's capabilities, as evidenced by comments such as "Loving the 2025 Tenere" and "Been putting my 2025 T7 to work!".²⁰ However, notable negative discussions centered on specific issues. Users reported "clutch problems within a few hundred miles" on new 2025 models.²⁰ Another common complaint was a dashboard bug where "the Average MPG just keeps on rising! Ours is currently doing over 200mpg!"²⁰, which was confirmed to be a display error rather than actual consumption.²⁰ Issues with low RPM fueling, potentially attributed to emissions regulations, were also mentioned, with some suggesting a remap as a necessary solution.²⁰

The presence of software and dashboard bugs, alongside initial mechanical issues like clutch problems, can significantly impact early adopter sentiment, even for otherwise well-received models. This indicates that while the Ténéré 700's core capabilities are appreciated, these quality control issues, particularly the persistent MPG bug, create user frustration and can undermine confidence in the brand's attention to detail and software integration. For the BMW R 12 G/S launch, this underscores the critical importance of not only mechanical reliability but also flawless software and user interface performance. Any perceived "bugs" or quality control shortcomings, even minor ones, have the potential to disproportionately affect initial market resonance and word-of-mouth, especially in a segment where reliability and precision are highly valued.

3.2.2. Honda Africa Twin Discussions

Reviews for the 2025 Honda Africa Twin Adventure Sports ES (CRF1100) generally praised its versatility. The 1098cc engine was described as "sublime" with an excellent sound, and its brakes were noted as sharp.¹¹ The Dual Clutch Transmission (DCT) system was highlighted as highly intuitive, offering smooth shifts and rev-matched downshifts.¹¹ The bike's agility, despite its 253 kg wet weight, and its suitability for

mountainous adventures were also positively noted.¹¹

Despite this generally positive reception, a specific Reddit discussion revealed significant negative sentiment tied to post-repair quality. A user reported experiencing "extreme vibration on the hands," "saddles move around," a cable obstructing ignition access, loose side plastic covers, a handbrake requiring excessive force, and misaligned wheels, all occurring after the bike was stolen and subsequently repaired at an official Honda dealership.²² This incident suggests potential issues with dealer service quality or repair standards rather than inherent flaws in the motorcycle's design or manufacturing.

The experience with the Honda Africa Twin illustrates how post-sale service quality and the competence of the dealer network can significantly influence brand perception and consumer satisfaction, even for a highly-regarded product. For BMW, this highlights that a successful launch extends beyond the product itself to encompass the entire customer journey. Ensuring that the dealer network is adequately trained, equipped, and committed to delivering high-quality service, particularly for complex new models or post-incident repairs, is crucial for maintaining customer satisfaction and preventing negative social media sentiment that could be misattributed to the product itself.

3.2.3. Ducati DesertX Discussions

The 2025 Ducati DesertX Discovery garnered praise for its robust off-road capabilities, including its 21-inch front and 18-inch rear spoked wheels, generous 250mm ground clearance, and specific Enduro and Rally rider modes.¹² Its design, with "hints of the 1980s Cagiva Explorer," was a key element of its appeal.⁷ Owners appreciated its versatility for various riding scenarios, including "highway trips, serious off roading, very spirited canyon carving".²⁴ The Testastretta engine and electronics were generally regarded as "tried and true reliable stuff".²⁴

Sentiment was predominantly positive, with some owners even claiming it was "considerably better in every way, and even more reliable" than the Africa Twin.²⁴ However, some minor issues were noted: "wind noise is pretty bad for most people, the OEM screen setup as your head in the worst buffeting zone".²⁴ Additionally, some felt that "weakest points are the wheels if you do some real hardcore shit. Suspension

could also be better, but it's good enough".²⁴

The strong positive reception for the Ducati DesertX, particularly its off-road capability and reliable core components, suggests that these fundamental strengths can outweigh minor ergonomic or accessory-related issues in consumer perception, especially when combined with a compelling heritage design. This indicates that if a manufacturer delivers on the core promise of a capable and engaging riding experience, minor drawbacks might be less critical or can be addressed through aftermarket solutions. For the R 12 G/S, this implies that if BMW delivers on its core promise of heritage-inspired, capable off-road performance, minor imperfections (such as the initially perceived small fuel tank for long-distance adventure) might be less critical or addressable through official accessory offerings, provided the overall package resonates with the target audience's primary desires.

3.2.4. KTM 890 Adventure R Discussions

The 2025 KTM 890 Adventure R is consistently positioned as the "king of mid-weight adventure" and is engineered for "offroad excellence".¹³ Its rally heritage-inspired design, WP XPLOR suspension, and advanced ABS are highlighted as key features.¹³ Discussions also frequently involved practical modifications, such as lowering kits and exhaust upgrades, aimed at improving sound and reducing weight.³⁶

Sentiment was highly positive, particularly concerning its off-road prowess and alignment with KTM's "READY TO RACE" character.¹³ Owners expressed appreciation for its capabilities on dirt trails and fire roads.³⁶ However, some issues were noted: the suspension was initially perceived as "stiff," requiring adjustment of preload.³⁶ The stock seat was not renowned for comfort, and even an aftermarket "Comfort Low" seat offered minimal padding that became noticeable after an hour of riding.³⁶ The stock exhaust note was described as "subdued and flat".³⁶

The strong resonance of KTM's "Ready to Race" and off-road excellence positioning with adventure riders, even if it implies a less "plush" or comfortable stock setup, appears to drive significant interest in aftermarket modifications. This indicates that the core performance promise is so compelling that riders are willing to invest further in aftermarket solutions to tailor the bike to their comfort or sound preferences, rather than seeking a different base motorcycle. For BMW, this suggests that a similar aftermarket ecosystem can be anticipated for the R 12 G/S, especially given its

retro/off-road focus. This presents an opportunity for BMW Motorrad to offer official accessory packages—such as a larger fuel tank, comfort seats, or specific off-road protection—that cater to enthusiasts' desire for personalization and enhanced capability, potentially increasing revenue and customer satisfaction.

3.2.5. Triumph Tiger 900 Discussions

The Triumph Tiger 900 GT Pro is widely praised in discussions as a "brilliant middleweight adventure bike".¹⁶ It is described as "practical, comfortable, easy to ride, nimble"¹⁵, and an "ideal bike for touring".¹⁵ Owners frequently highlight its comfort, particularly for older riders, and its agility.¹⁶ Sentiment is overwhelmingly positive regarding its road and touring capabilities, with owners expressing enjoyment in riding it on long trips across Europe.¹⁶

A minor practical issue noted was difficulty in fitting a Givi top box mounting plate, which some perceived as an implicit push towards purchasing Triumph's own accessories.¹⁶

The consistently positive feedback for the Triumph Tiger 900 GT Pro underscores that comfort and ease of use are significant drivers for a segment of adventure riders, particularly those who prioritize touring. This can foster strong brand loyalty. While some adventure riders prioritize extreme off-road capability, a substantial segment values comfort and practicality for long-distance touring and general road use. For the BMW R 12 G/S, while it is off-road oriented, this suggests that attention to comfort and road manners should not be overlooked. Positioning the R 12 G/S as a versatile motorcycle that is both capable off-road and comfortable for longer road journeys could broaden its appeal. Furthermore, ensuring easy integration of touring accessories, such as luggage, is important to prevent user frustration and encourage adoption for diverse riding styles.

Table 4: Social Listening Theme Analysis - Competitor Models (Jan-Mar 2025)

Model	Key Themes	Common Issues/Criticisms	Positive Feedback/Praise	Overall Sentiment
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Yamaha Ténéré 700	New tech (YCC-T, ride modes, adjustable suspension), off-road focus, heritage design.	Clutch problems within a few hundred miles; Dashboard MPG bug ("over 200mpg"); Low RPM fueling (lean).	"Loving the 2025 Tenere"; "Been putting my 2025 T7 to work!"; Capable new features.	Mixed (Positive on capability, negative on initial quality/software bugs)
Honda Africa Twin	Versatility, powerful engine, intuitive DCT, off-road capability.	Post-repair issues: "extreme vibration on the hands," "saddles move around," "cable in front of ignition," "side plastic covers move," "handbrake needs force," "wheels misaligned."	Engine "sublime"; Excellent sound; Sharp brakes; Intuitive DCT; Agile despite weight; Good for mountainous adventures.	Generally Positive (Performance), Negative (Post-sale service/repair quality)
Ducati DesertX	Off-road prowess (21"/18" wheels, 250mm ground clearance, rider modes), retro design (Cagiva Explorer hints), versatile.	"Wind noise is pretty bad" (OEM screen); "Weakest points are the wheels"; "Suspension could also be better."	"Considerably better...more reliable" than Africa Twin; "Tried and true reliable stuff" (engine/electrics); Excels on "highway trips, serious off roading, very spirited canyon carving."	Predominantly Positive (Strong core, minor fixable flaws)
KTM 890 Adventure R	Mid-weight adventure leader, off-road excellence, rally heritage, WP XPLOR suspension.	Suspension "stiff" initially (requires preload adjustment); Stock seat uncomfortable; Stock exhaust "subdued and flat."	"King of mid-weight adventure"; "Engineered for offroad excellence"; "READY TO RACE mentality"; Great for dirt	Highly Positive (Core performance, aftermarket customization)

			trails and fire roads.	
Triumph Tiger 900 GT Pro	Practicality, comfort, touring suitability, nimble, middleweight adventure.	Difficulty fitting aftermarket top box mounting plate (push for OEM).	"Brilliant middleweight adventure bike"; "Practical, comfortable, easy to ride, nimble"; "Ideal bike for touring"; "Superb bike...comfortable!"	Overwhelmingly Positive (Road/touring focus, comfort)

Source: ¹⁰

3.3. Adventure Segment Discussion Themes (Estimated Percentages)

Based on the qualitative analysis of consumer conversations and reviews from January-March 2025, the following are the estimated percentages for dominant discussion themes within the UK adventure motorcycle segment:

Table 5: Estimated Adventure Segment Discussion Themes (Jan-Mar 2025)

Theme	Estimated % of Discussions
Off-Road Performance	26.0%
Design & Character Appeal	21.0%
Technology & Features	17.0%
Comfort & Ergonomics	14.0%
Reliability Concerns	10.0%
Value & Pricing	7.0%
Any other key themes (e.g., Weight, Fuel Range, Aftermarket)	5.0%

Total	100.0%
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Note: Percentages are estimates based on qualitative assessment of discussion volume and emphasis within the research material.

3.4. Overall Adventure Segment Sentiment (Estimated Percentages)

The overall sentiment across discussions in the UK adventure motorcycle segment from January-March 2025 is estimated as follows:

Table 6: Estimated Overall Adventure Segment Sentiment (Jan-Mar 2025)

Sentiment	Estimated %
Positive	55.0%
Neutral	25.0%
Negative	20.0%
Total	100.0%

Note: Percentages are estimates based on qualitative assessment of sentiment expressed within the research material.

3.5. General Consumer Priorities and Expectations in the Adventure Segment

Analysis of the adventure motorcycle market reveals several key consumer priorities and expectations. There is a growing demand for motorcycles capable of both touring and off-road excursions, driven by the increasing popularity of motorcycle adventure tourism.³⁷ This is evident in the fact that over 70% of riders now prefer adventure motorcycles over traditional cruisers for their multi-terrain capabilities³⁷, and dual-sport motorcycles alone account for over 60% of market expansion.³⁷ A significant majority of adventure motorcycle owners, over 85%, prioritize features such as advanced suspension, off-road tires, and high ground clearance.³⁷

However, this demand for advanced features and capability is tempered by several restraints. The high cost of adventure motorcycles, particularly models above 1000cc, is a significant deterrent, with over 65% of potential buyers finding them too expensive.³⁷ Maintenance costs are also a concern for 40% of owners, who cite higher servicing expenses compared to standard motorcycles.³⁷ Furthermore, over 50% of adventure riders report difficulty in handling heavy models, leading to an increased focus on lightweight alternatives.³⁷ Rising insurance costs also present a barrier, particularly for electric bikes, with some consumers prioritizing affordable transport.³⁸

This dynamic reveals a clear tension between the desire for premium features and high capability on one hand, and the market's sensitivity to high cost and weight on the other. This tension creates a strategic opportunity for a "puristic" heritage model that can balance essential capability with a potentially more accessible price point and manageable weight. The BMW R 12 G/S, positioned as a "retro enduro" ⁸ with "reduced basic equipment" but retaining a 21-inch front wheel, long suspension travel (200mm+), and ABS ⁶, appears to address this market need. Its leaked wet weight of 229 kg ⁸ is lighter than the R1300GS (260kg) ⁸, and its estimated price around €17,000 / £14,420 ⁸ is lower than the R1300GSA (£18,780).⁷ By focusing on core off-road features and a heritage aesthetic, the R 12 G/S can appeal to riders seeking a more "pure" and less complex experience, potentially capturing a segment of the market that finds current adventure bikes too heavy, expensive, or overly complex.

3.6. Interest in Heritage-Styled Adventure Motorcycles

The market's interest in heritage-styled adventure motorcycles is a significant and growing trend. This is strongly supported by the performance of the 'Modern Classic' motorcycle category, which includes "retro roadsters." This segment demonstrated substantial growth in 2024, increasing by 31.7%, and showed remarkable resilience in Q1 2025, with only a 9.8% decline compared to the broader market contraction.¹

Furthermore, several key competitors are actively leveraging heritage aesthetics in their adventure motorcycle offerings:

- The **Yamaha Ténéré 700 Rally** features a "unique heritage-inspired colour scheme with gold coloured wheels and Yamaha's iconic speed block design," explicitly drawing on a desert racer aesthetic.⁹
- The **KTM 890 Adventure R** boasts an "all-new look inspired by KTM's rally

heritage" and embodies a "READY TO RACE mentality".¹³ Similarly, the KTM 390 Adventure R highlights its "true rally-inspired design" and graphics "inspired by KTM's vast Rally racing heritage".¹⁴

- The **Ducati DesertX Discovery** explicitly references its design lineage to the "original Cagiva Elephant" from over three decades ago, reinterpreting it with a modern flair.¹²

The strong performance of the Modern Classic segment and the explicit heritage-based marketing by these competitors validate a significant and growing consumer appetite for retro-styled adventure motorcycles. This creates a clear market opportunity for the BMW R 12 G/S. Its naming convention, "R 12 G/S, with a slash, like the legendary original R 80 G/S from 1980" ⁸, and its stated purpose to "pay homage to the legendary BMW R 80 G/S of 1980" ⁶, directly align it with this trend. This authentic heritage provides a key differentiator against competitors who might have a more general "rally" or "retro" theme. The R 12 G/S can be positioned as the

original retro adventure bike, re-imagined for the modern rider, tapping into a desire for authenticity and a connection to motorcycling history.

4. Competitor Share of Voice

4.1. Estimated Adventure Segment Share of Voice (SOV)

Based on a qualitative assessment of online presence, discussion volume, and mentions across various sources from January-March 2025, the estimated Share of Voice (SOV) for key competitors within the UK adventure segment is as follows:

Table 7: Estimated Adventure Segment Share of Voice (SOV) (Jan-Mar 2025)

Competitor	Estimated % SOV
BMW GS Series (traditional)	22.5%

Yamaha Ténéré 700	17.5%
Honda Africa Twin	16.5%
KTM 890 Adventure R	15.5%
Ducati DesertX	11.5%
Triumph Tiger 900	9.5%
Other Adventure Bikes	7.0%
Total	100.0%

Note: Percentages are estimates based on qualitative assessment of discussion volume and emphasis within the research material.

4.2. Qualitative Assessment of Online Presence and Discussion Volume

While direct quantitative data for "share of voice" (e.g., number of mentions per brand across all platforms) is not explicitly available, a qualitative assessment of online presence and discussion volume for key competitors can be derived from the provided information.

- **BMW:** The brand maintained a strong online presence, particularly with significant pre-launch speculation and discussion on forums like UKGSer.com regarding the impending R 12 G/S.⁵ This indicates high anticipation and brand relevance for new models. The R1300GSA is also consistently listed as a top adventure bike⁷, reinforcing its market position. BMW's overall market share gain in Q1 2025 further solidifies its online visibility and discussion volume.²
- **Honda:** Active discussions on Reddit regarding specific issues with the Africa Twin after a repair incident²² indicate a vocal owner base. Positive reviews on sites like BikeSocial also contribute to its online presence.¹¹ Honda maintains overall market leadership, ensuring a consistent level of discussion.²
- **Yamaha:** The Ténéré 700 generated prominent discussions on Reddit, encompassing both positive feedback and detailed reports of issues like clutch problems and dashboard bugs.²⁰ This suggests a highly engaged community, despite Yamaha experiencing a significant sales decline in Q1 2025.²
- **KTM:** KTM maintained a strong presence in news and reviews for its 2025 models, particularly the 890 Adventure R and 390 Adventure R.¹³ Discussions often

centered on their off-road excellence and rally heritage.

- **Ducati:** The DesertX garnered notable attention in reviews and owner discussions, highlighting its unique positioning as a retro-inspired, off-road capable machine.¹²
- **Triumph:** The Tiger 900 received positive mentions in reviews and forums, particularly for its touring capabilities and comfort.¹⁵

Overall, BMW, Honda, Yamaha, KTM, and Ducati appear to command significant online presence and discussion volumes within the adventure segment, reflecting their respective market positions and recent model updates. The discussions for BMW, in particular, were heavily focused on the impending R 12 G/S, indicating high anticipation.

The high volume of specific model-level discussions, such as the Ténéré 700's reported issues, the Africa Twin's post-repair challenges, and the DesertX's capabilities, indicates a highly engaged and vocal online community. This community is discerning and actively scrutinizes new models and their performance, often delving into technical details, sharing user experiences, and even proposing solutions. This suggests that the BMW R 12 G/S launch will be met with similar scrutiny. Transparency about the motorcycle's specifications, proactive communication regarding its intended purpose (e.g., distinguishing it as a heritage enduro rather than a long-distance tourer), and a robust post-launch support system will be crucial to effectively manage community expectations and foster positive sentiment.

5. BMW R 12 G/S Pre-Launch Mentions & Speculation

5.1. Forum Discussions and Community Reactions to Leaked Specifications

Speculation surrounding the BMW R 12 G/S was highly active on UK motorcycle forums, particularly UKGSer.com, during January-March 2025, leading up to its official presentation on March 27, 2025.⁶

Initial reactions to leaked images and information were mixed. Some users questioned

the authenticity of early visuals, citing "weird background text, wrong corporate logo - AI generated and badly at that".⁸ However, official confirmation from BMW Motorrad CEO Markus Flasch and the appearance of official teaser images quickly solidified the news of the new model.⁶

Key leaked specifications became central to community discussions:

- **Engine:** The R 12 G/S was confirmed to feature the 1,170cc air-oil-cooled DOHC boxer engine, delivering 109 hp and 115 Nm of torque through a 6-speed transmission, identical to the R 12 nineT.⁶
- **Weight:** A leaked wet weight of 229 kg (with a 90% full 15.5L tank) generated significant discussion.⁶ This figure prompted skepticism regarding its "lightweight" claim, with users drawing comparisons to the much lighter original R 80 G/S (around 170kg) and the heavier R1300GS (around 260kg).⁸
- **Fuel Tank:** The 15.5-liter fuel tank was widely cited as a "most disappointing spec" and even "a joke for this motor" by some forum members.⁸ This led to concerns that the bike might be "more of an Urban GS poser machine with upgraded suspension than adventure motorcycle to travel on".⁸ Speculation immediately arose about the inevitable availability of an "optional larger Dakar tank".⁸
- **Wheels/Suspension:** The confirmation of a 21-inch front wheel and long suspension travel (at least 200mm front and rear) was generally received positively, as it indicated genuine off-road capability, aligning with the description of a "proper, fully off-road capable enduro".⁶
- **Equipment:** The bike was noted to have "slimmed down basic equipment" with essential modern features like ABS, but with additional optional features expected to be available.⁶
- **Pricing:** The estimated price of around €17,000 / £14,420 OTR was seen as competitive within the premium segment, especially when compared to the R 12 nineT.⁸

The immediate community focus on the R 12 G/S's weight and fuel tank capacity, despite positive reception of its other off-road specifications, indicates a critical tension point between its heritage aesthetic and its practical utility for adventure riding. The "poser machine" comment reflects a concern that the bike might prioritize style over the substance required for serious adventure use. This highlights a need for BMW's launch messaging to directly address the R 12 G/S's intended purpose and target audience. If the bike is primarily for "puristic off-road fun" ²⁶, the smaller tank might be acceptable for its niche. However, if it aims for broader adventure touring appeal, the availability and benefits of a larger optional tank need to be a prominent

part of the launch strategy, and its weight should be contextualized against its specific capabilities rather than just raw numbers.

Table 8: BMW R 12 G/S Pre-Launch Speculation & Community Sentiment (Jan-Mar 2025)

Key Leaked Specification/Feature	Leaked Detail/Official Confirmation	Community Reaction/Sentiment	Key Quotes from Discussions
Authenticity of Initial Images	Early images shared on forums (March 27, 2025). Official teaser images appeared March 24, 2025. BMW Motorrad CEO Markus Flasch confirmed arrival in March 2024.	Initial skepticism, followed by confirmation.	"It's a hoax, they do lots of these." ⁸ (initially); "It's true" ⁸ (after confirmation).
Engine	1,170cc air-oil-cooled DOHC boxer, 109 hp, 115 Nm torque, 6-speed (same as R 12 nineT).	Generally positive/expected, as it's a proven engine.	"Air-oil-cooled boxer engine with 1,170 cc and 109 hp". ⁸
Weight	229 kg wet (with 90% full 15.5L tank).	Skepticism, disappointment regarding "lightweight" claim.	"Lightweight...229kg.. .Oh FFS." ⁸ ; "Original G/S was about 170kg wasn't it? What's 60kg between friends?" ⁸ ; "Compared with the 260kg odd of the 1300 it is light.". ⁸
Fuel Tank	15.5-liter capacity.	Significant disappointment, concern about range for adventure touring.	"The most disappointing spec is the 15l tank, which is a joke for this motor." ⁸ ; "if it only holds 15L of fuel it'll be more of an Urban GS poser machine with upgraded suspension than adventure

			motorcycle to travel on." ⁸
Wheels/Suspension	21-inch front wheel, 200mm+ travel front/rear (upside-down fork, Paralever swingarm).	Positive, indicates true off-road capability.	"21-inch front wheel and long suspension travel". ⁸
Equipment	"Slimmed down basic equipment" with essential modern features (e.g., ABS). Optional features expected (e.g., gearshift assistant, tire pressure indicators).	Mixed, anticipation of necessary optional extras.	"Reduced basic equipment" ⁸ ; "Probably a €2,400 option for a useful tank. And €600 for a 'comfortable' seat.....". ⁸
Price	Estimated around €17,410 / £14,420 OTR.	Seen as competitive, especially compared to R 12 nineT.	"17410 Euro?" ⁸ ; "£14,420 OTR". ²⁶

Source: ⁵

5.2. Sentiment and Expectations Surrounding the R 12 G/S

Overall sentiment surrounding the BMW R 12 G/S in the pre-launch period was a complex mix of anticipation for a new heritage-styled BMW adventure bike and skepticism regarding its practical adventure credentials, largely due to the leaked weight and fuel capacity figures.

Expectations were high for its off-road capability, primarily driven by the confirmed 21-inch front wheel and substantial suspension travel (200mm+ front and rear).⁶ This aligned with the motorcycle's positioning as a "proper, fully off-road capable enduro".⁸ The estimated pricing, around €17,000 / £14,420 OTR, was generally perceived as competitive within the premium segment, particularly when compared to other models in the R 12 family like the R 12 nineT.⁸

However, the leaked 15.5-liter fuel tank and 229 kg wet weight generated significant

concern. There was an immediate assumption among the community that essential features like a larger fuel tank and more comfortable seating would be offered as optional extras.⁸ This indicates a readiness among consumers to customize the bike to their needs, but also a potential source of frustration if these are perceived as necessary upgrades rather than genuine optional enhancements.

The pre-launch discourse reveals a critical need for BMW to clearly define the R 12 G/S's niche within the broader GS family and the adventure segment to effectively manage consumer expectations. The perception of the R 12 G/S as potentially an "Urban GS poser machine" due to its tank size, despite its off-road specifications⁸, highlights this challenge. Given that BMW already offers the R1300GS Adventure as its flagship long-distance tourer⁷, the R 12 G/S, as a "retro enduro"⁸, needs a distinct identity. If BMW does not clearly articulate its purpose, consumers will define it, potentially in a way that undermines its intended market position. The "slash" in R 12 G/S (Gelände/Straße - Off-road/Street)⁶ needs to be fully explained in terms of its *intended balance* and the specific type of adventure it is designed for.

6. Strategic Implications & Recommendations for BMW Motorrad

The pre-launch social listening and market analysis for the BMW R 12 G/S reveal significant opportunities and critical areas requiring strategic attention for a successful launch in the UK market.

6.1. Leveraging Heritage Positioning in Launch Strategy

The resilience of the 'Modern Classic' segment and the active adoption of heritage/rally aesthetics by key competitors present a compelling opportunity for BMW Motorrad. The R 12 G/S, with its direct and authentic lineage to the pioneering R 80 G/S from 1980, holds a unique advantage.

- **Recommendation:** The launch campaign should emphatically position the R 12 G/S as the *original* retro adventure bike, directly connecting it to BMW's foundational role in the adventure segment. This narrative should highlight the

pioneering spirit and legendary reliability of the R 80 G/S in challenging environments.

- **Recommendation:** Utilize powerful visual storytelling that contrasts the R 12 G/S with its iconic predecessor, demonstrating how modern BMW engineering and technology enhance, rather than compromise, the authentic G/S experience. This can appeal to both nostalgic riders and those seeking a pure, capable machine.
- **Recommendation:** Position the "slimmed down basic equipment" not as a compromise, but as a deliberate return to "puristic off-road fun." This messaging can resonate with riders who feel modern adventure bikes have become overly complex or heavy, appealing to a desire for a more direct and unburdened riding experience.

6.2. Addressing Market Challenges and Opportunities

The overall market decline in Q1 2025, largely an artificial correction due to Euro 5+ pre-registrations, suggests a market rebalancing rather than a fundamental collapse. BMW's relative market share gain in this period indicates underlying brand strength.

- **Recommendation:** Acknowledge the challenging market conditions but frame the R 12 G/S launch as a strategic move to capture growth in the resilient heritage/classic segment, which is less affected by the broader downturn.
- **Recommendation:** Proactively address consumer concerns about the 15.5-liter fuel tank. From day one, prominently offer and promote an optional larger 'Dakar' style tank. This directly manages expectations regarding range anxiety and provides a practical solution for riders desiring longer expeditions, preventing negative sentiment from taking root.
- **Recommendation:** Clearly articulate the R 12 G/S's intended adventure profile. Emphasize its strengths in technical off-road riding, shorter expeditions, and delivering a pure riding experience. This differentiation from the R1300GSA's long-distance touring focus will manage expectations around its weight and range, ensuring the bike is perceived for its intended capabilities rather than being miscategorized as an underperforming long-haul tourer.

6.3. Recommendations for Competitive Differentiation

Competitors such as Yamaha, Honda, Ducati, and KTM hold established positions and exhibit varying levels of consumer satisfaction and reported issues.

- **Recommendation:** Differentiate the R 12 G/S by emphasizing BMW's renowned build quality and engineering precision. This can be subtly highlighted in light of reported competitor issues, such as Yamaha's clutch/software bugs or Honda's post-repair quality concerns, reinforcing BMW's premium image and reliability.
- **Recommendation:** Reiterate the R 12 G/S's authentic heritage as a key differentiator. While competitors feature "rally" or "retro" themes, BMW's direct, named lineage to the R 80 G/S provides an unparalleled historical connection that can be leveraged as a unique selling proposition. BMW's history is, in many respects, integral to the history of the adventure motorcycle segment itself.
- **Recommendation:** Capitalize on the observed trend of aftermarket modifications among competitor owners (e.g., KTM's seat and exhaust changes). BMW Motorrad should consider offering official accessory packages—such as a larger fuel tank, comfort seats, or specific off-road protection—that cater to enthusiasts' desire for personalization and enhanced capability, potentially increasing revenue and customer satisfaction.
- **Recommendation:** Ensure the entire dealer network is comprehensively prepared for the R 12 G/S launch. This includes thorough training on the model's unique positioning, its specific features, and how to address common customer inquiries and concerns (e.g., the purpose of the tank size, its weight in context, and its heritage appeal). A well-informed and consistent dealer experience will be vital for a positive customer journey and sustained brand perception.

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