

# **WEIGHTED RESONANCE INDEX (WRI) ANALYSIS - PRE-LAUNCH BASELINE**

## **Introduction and Market Context**

The Romanian adventure motorcycle market demonstrated consistent growth in the first quarter of 2025, indicating a receptive environment for new models.<sup>1</sup> This expansion is largely driven by a strong consumer desire for outdoor activities and multi-terrain exploration, aligning with Romania's diverse and challenging landscapes.<sup>1</sup> Key competitors, including Yamaha, Honda, and KTM, maintained significant discussion share, while value-oriented brands like CF Moto showed notable emergence.<sup>1</sup> Consumer conversations during this period prominently featured off-road performance, comfort, and technology, alongside a growing appreciation for heritage styling and lighter, more manageable adventure bikes.<sup>1</sup>

## **Purpose of the WRI Analysis**

This report establishes a pre-launch baseline for consumer priorities within the Romanian adventure motorcycle segment, specifically for the period of January to March 2025, prior to the availability of the BMW R 12 G/S. The analysis employs the Weighted Resonance Index (WRI) methodology to assess the importance of 20 key attributes to consumers' purchase decisions. This market intelligence is crucial for validating social intelligence methodologies and informing future strategic positioning for the R 12 G/S. It is imperative that the scoring of attributes reflects consumer priority importance, not sentiment performance toward existing products.<sup>1</sup>

## **ADVENTURE ATTRIBUTE RANKINGS - PRE-LAUNCH BASELINE**

(Jan-Mar 2025)

The Weighted Resonance Index (WRI) for each attribute was calculated using the formula:  $WRI = (0.4 \times \text{Social Listening}) + (0.3 \times \text{Sales/Market Data}) + (0.2 \times \text{Consumer Surveys/Reviews}) + (0.1 \times \text{Expert Analysis/Comparisons})$ . All factor scores were normalized to a 0-100 range before applying weights.

**Weighted Resonance Index (WRI) Scores and Rankings**

The following table presents the calculated WRI scores for each attribute, along with their normalized component scores and overall ranking, providing a quantitative overview of consumer priorities in the Romanian adventure motorcycle market during the pre-launch period.

| Rank | Attribute Name                        | Social Listening (0-100) | Sales/Market Data (0-100) | Consumer Surveys/Reviews (0-100) | Expert Analysis (0-100) | WRI Score |
|------|---------------------------------------|--------------------------|---------------------------|----------------------------------|-------------------------|-----------|
| 1    | Suspension Quality                    | 22                       | 85                        | 85                               | 85                      | 59.8      |
| 2    | Off-Road Performance                  | 25                       | 75                        | 85                               | 95                      | 59.0      |
| 3    | Versatility (Dual-Purpose Capability) | 20                       | 80                        | 85                               | 90                      | 58.0      |
| 4    | Heritage/Retro Styling                | 20                       | 70                        | 85                               | 95                      | 55.5      |
| 5    | Value for Money                       | 10                       | 80                        | 75                               | 85                      | 51.5      |

|    |  |    |    |    |    |      |
|----|--|----|----|----|----|------|
| 6  | Price Range                                      | 10 | 80 | 75 | 85 | 51.5 |
| 7  | Brand Reliability                                | 10 | 70 | 85 | 95 | 51.5 |
| 8  | Manageability/Weight                             | 10 | 75 | 80 | 85 | 51.0 |
| 9  | Engine Size & Performance                        | 15 | 65 | 80 | 90 | 50.5 |
| 10 | Technology & Features                            | 20 | 60 | 80 | 80 | 50.0 |
| 11 | Rider Aids & Safety Systems                      | 18 | 60 | 80 | 80 | 49.2 |
| 12 | Long-Distance Touring Capability                 | 15 | 60 | 75 | 70 | 46.0 |
| 13 | Comfort & Ergonomics                             | 20 | 40 | 80 | 90 | 45.0 |
| 14 | Aesthetic Appeal/Character                       | 10 | 60 | 70 | 90 | 45.0 |
| 15 | Connected Features (TFT, Smartphone Integration) | 15 | 55 | 75 | 60 | 43.5 |
| 16 | Fuel Range & Efficiency                          | 8  | 60 | 70 | 60 | 41.2 |

|    |                                       |   |    |    |    |      |
|----|---------------------------------------|---|----|----|----|------|
| 17 | Braking Performance                   | 8 | 50 | 60 | 60 | 41.2 |
| 18 | Steering Stability/Damping            | 5 | 50 | 60 | 60 | 41.2 |
| 19 | Dealer Network & Service Availability | 5 | 50 | 70 | 65 | 37.5 |
| 20 | Build Quality & Finish                | 5 | 60 | 50 | 65 | 36.5 |
| 21 | Seat Height & Accessibility           | 5 | 50 | 40 | 50 | 30.0 |
| 22 | Aftermarket Support & Customizability | 3 | 30 | 30 | 40 | 20.2 |

## Detailed Attribute Analysis

### 1. Suspension Quality - WRI Score: 59.8

Suspension quality emerged as the highest-priority attribute, reflecting a strong consensus across all data sources regarding its importance to adventure riders. Discussions frequently highlight "advanced suspension" and "long travel suspension" for leading models, indicating its prominence in consumer conversations.<sup>1</sup> Market data underscores its influence, with over 85% of adventure motorcycle owners prioritizing advanced suspension.<sup>1</sup> Experts consistently categorize it as a highly important

differentiator, noting its direct support for off-road capability and rider customization.<sup>1</sup>

The high ranking of suspension quality, even slightly above general off-road performance, indicates a nuanced consumer understanding. Riders are not simply seeking off-road capability; they desire *quality, adjustable, and confidence-inspiring* suspension. This focus on the specific component suggests that consumers recognize the direct impact of superior suspension on control, comfort, and the ability to confidently navigate challenging terrains, which is paramount for enjoying Romania's diverse landscapes. For manufacturers, this implies that merely claiming "off-road capability" is insufficient; the quality and adjustability of the suspension system itself represent a critical investment area that resonates deeply with consumer expectations for a premium adventure experience.

## **2. Off-Road Performance - WRI Score: 59.0**

Off-road performance stands as a consistently top-tier attribute, central to the identity of the adventure segment. It represents the single highest discussion theme in social listening, with riders actively debating the capabilities of various models.<sup>1</sup> Market data reinforces this, showing that the off-road adventure segment commands a dominant 70% global market share, and over 80% of riders identify adventure bikes as their primary option for multi-terrain exploration.<sup>1</sup> Consumer surveys explicitly confirm this priority, with over 85% of owners prioritizing features like off-road tires and high ground clearance.<sup>1</sup> Experts deem it critical for success, especially given Romania's challenging terrain.<sup>1</sup>

While the desire for off-road capability is exceptionally high, social listening also reveals some skepticism about whether owners truly take heavy, expensive bikes into extreme off-road conditions.<sup>1</sup> This observation points to a potential difference between aspirational buying (desire for extreme capability) and practical usage. Consumers may seek the capability as a safety net or for occasional use, but might not fully exploit it due to concerns about damage, rider skill, or the sheer weight of larger machines. For BMW, this suggests that while highlighting the R 12 G/S's off-road potential (e.g., 21/18 wheels, long travel suspension), framing it within a realistic context of "authentic adventure" or "capable for varied terrain" might resonate more broadly than solely emphasizing hardcore enduro prowess. This approach can manage expectations and align with actual usage patterns, particularly

for a model positioned as a heritage-inspired alternative.

### **3. Versatility (Dual-Purpose Capability) - WRI Score: 58.0**

This attribute scores highly due to its fundamental alignment with the adventure segment's definition and strong market data. While not a standalone social listening theme, it underpins discussions around off-road performance and comfort, reflecting the overall emphasis on multi-terrain exploration.<sup>1</sup> Market data significantly supports its importance, with a strong preference for dual-sport motorcycles contributing to over 60% of the total market expansion.<sup>1</sup> Consumer expectations clearly indicate a strong desire for genuine multi-terrain capability.<sup>1</sup> Experts explicitly recognize this as a core consumer preference, noting that the prioritization of off-road-specific features indicates a desire for "genuine capability beyond just superficial 'looks'".<sup>1</sup>

The strong emphasis on dual-purpose capability and genuine off-road features, juxtaposed with the skepticism about extreme off-road use for heavy bikes, suggests that consumers desire *competent versatility* rather than specialized extremism. Riders want bikes that are genuinely capable of handling diverse conditions, offering the freedom and confidence to explore varied terrain without being limited. This broad appeal drives market expansion. For the R 12 G/S, this implies that positioning it as a highly versatile machine, capable of both spirited on-road riding and competent off-road exploration (e.g., light to moderate trails), will resonate more broadly than focusing solely on extreme off-road prowess, which might alienate riders seeking a balanced experience.

### **4. Heritage/Retro Styling - WRI Score: 55.5**

Heritage/Retro Styling achieved a remarkably high WRI score, driven by strong market trends and expert validation, despite being a sub-theme in social listening. Social listening reveals intense discussion around the R 12 G/S's "classic enduro design inspired by the legendary BMW R 80 G/S," with its "iconic BMW motorsport colours, spoked wheels, knobby tyres and near-identical silhouette".<sup>1</sup> The popularity of the "Long Way Home" series further popularizes this nostalgic appeal.<sup>1</sup> Market data highlights a "burgeoning 'neo-retro' trend" and notes the "controversial styling" of the

R 1300 GS contributing to "less enthusiastic market acceptance," indicating a clear market gap for alternative styling.<sup>1</sup> Consumers express that the "Return of Neo-Retro Motorcycles" appeals to both nostalgic riders and younger individuals seeking to express personality.<sup>1</sup> Experts explicitly state this attribute is paramount for the R 12 G/S, identifying a "discernible gap" for such a product.<sup>1</sup>

The high resonance of Heritage/Retro Styling, especially when contrasted with the R 1300 GS's styling challenges, indicates a significant market segmentation. This is not merely about having heritage; it is about leveraging it as a strategic counter-positioning to modern flagship models. The perceived underperformance of the R 1300 GS suggests that consumers are not universally embracing the bleeding-edge aesthetic, creating an opening for a premium, simpler, nostalgic alternative. BMW can position the R 12 G/S not just as a new model, but as a philosophical choice for riders who prioritize authenticity, character, and a more "pure" riding experience over sheer technological complexity or imposing size. This "anti-flagship" sentiment is gaining traction in the market.

## **5. Value for Money - WRI Score: 51.5**

Value for Money is a critical attribute, tied with Price Range and Brand Reliability, indicating that economic considerations and trust are highly intertwined and collectively form a crucial cluster of consumer priorities. Social listening shows value and pricing as recurring topics.<sup>1</sup> Market data strongly emphasizes that "over 65% of potential buyers find high-end bikes too expensive," and there is a clear shift towards "more affordable motorcycle" options.<sup>1</sup> Consumer reviews laud models like the CF Moto 450 MT for offering "much better value".<sup>1</sup> Experts confirm the necessity for the R 12 G/S to "demonstrate superior value relative to its price point".<sup>1</sup>

The strong linkage and high WRI scores for Value, Price, and Reliability demonstrate that for the Romanian market, "value" extends beyond just the initial purchase price. It encompasses the long-term cost of ownership, peace of mind, and the confidence that the bike will perform reliably. For adventure riders, reliability is not just about avoiding repair costs; it is about safety and the ability to complete the journey, elevating it to a non-negotiable status that directly impacts perceived value. The shift towards "sensible and more affordable" bikes suggests consumers are actively seeking a better balance between cost and these core attributes. For the R 12 G/S, its premium price point necessitates a strong justification of its value, emphasizing

BMW's reputation for reliability and the long-term peace of mind it offers. Proactive communication about warranty or BMW's established dealer network will be crucial to address this cluster of priorities effectively.

## **6. Price Range - WRI Score: 51.5**

Price Range is intrinsically linked to Value for Money, sharing the same WRI score. Market data clearly indicates that high-end adventure motorcycles are frequently perceived as "too expensive" by over 65% of potential buyers, directly influencing purchase decisions.<sup>1</sup> The growth of mid-capacity motorcycles, preferred for their more accessible pricing, further highlights price sensitivity.<sup>1</sup>

The high importance of Price Range underscores the pragmatic approach of Romanian consumers. While they desire premium adventure experiences, they are highly sensitive to the financial investment required. The perceived underperformance of the R 1300 GS in market reception is likely tied to this price sensitivity.<sup>1</sup> For the R 12 G/S, its success will depend on clearly communicating its value proposition relative to both the more expensive R 1300 GS and more affordable mid-capacity alternatives. Its "simplicity" and "heritage" appeal could justify its price point for a specific segment of buyers who prioritize these attributes over the absolute latest technology or maximum displacement.<sup>1</sup>

## **7. Brand Reliability - WRI Score: 51.5**

Brand Reliability is a critical attribute, tied with Value for Money and Price Range, underscoring the consumer's need for trust and dependability. "Reliability Concerns" constitute a significant portion of social discussions.<sup>1</sup> Consumers praise models for being "very well tested" and "even more reliable," while a 5-year warranty is seen as a "significant trust factor".<sup>1</sup> Experts deem reliability "fundamental for adventure riding" and "non-negotiable" for serious riders, especially given the risks of breakdowns in remote areas.<sup>1</sup>

The strong emphasis on reliability reflects a deep-seated need for assurance in a vehicle designed for challenging environments. For adventure riders, a bike's



dependability is paramount for safety and the successful completion of journeys. This psychological aspect elevates reliability beyond mere maintenance costs. The market's response to brands offering extended warranties to address reliability concerns further highlights its influence on purchasing decisions.<sup>1</sup> BMW's established reputation for durability can be a significant asset for the R 12 G/S, reinforcing its value proposition and building consumer confidence.

## **8. Manageability/Weight - WRI Score: 51.0**

Manageability/Weight scores highly, driven by explicit consumer feedback on the difficulty of handling heavy models. Social listening reveals specific criticisms about the weight of various adventure bikes.<sup>1</sup> Market data indicates that over 50% of adventure riders report difficulty handling heavy models, leading to an increased focus on lightweight alternatives.<sup>1</sup> Consumers express a growing interest in lighter, more manageable machines, particularly among older riders, to reduce fatigue and enhance handling ease.<sup>1</sup> Experts categorize it as a highly important differentiator, noting it as a "growing concern" and highlighting the R 12 G/S's "relative lightness" as a significant advantage.<sup>1</sup>

The high importance of manageability and weight, coupled with the "anti-flagship" sentiment, suggests a maturing adventure market where riders prioritize practical usability and enjoyment over sheer size or raw power. The difficulty of handling heavy bikes directly impacts rider confidence and can lead to fatigue, especially in off-road scenarios. For many riders, the experience of riding a manageable bike outweighs the need for maximum displacement or features. The R 12 G/S, weighing 229kg wet compared to the R 1300 GS's 237kg<sup>1</sup>, possesses a crucial competitive advantage. BMW should explicitly highlight this attribute in marketing, positioning the R 12 G/S as an "approachable," "agile," and "feel-good" alternative that directly addresses a key consumer pain point.<sup>1</sup>

## **9. Engine Size & Performance - WRI Score: 50.5**

Engine Size & Performance is a strong performer, reflecting the importance of a capable and characterful engine. While not a top discussion theme, social listening

reveals specific praise for engine characteristics such as "extraordinary," "full of torque," and distinctive engine sounds.<sup>1</sup> Market data shows that mid-capacity motorcycles (500-1000cc) are the most preferred segment, accounting for over 60% of global sales, largely due to their "balanced combination of power and weight".<sup>1</sup> Consumer surveys highlight a preference for smooth, tractable engine character and strong torque delivery.<sup>1</sup> Experts categorize it as critical for success, emphasizing that a "powerful yet tractable engine is crucial for both on-road confidence and off-road control" and that "unique character... adds significantly to the overall appeal".<sup>1</sup>

The preference for a "balanced combination of power and weight" in mid-range bikes, despite the R 12 G/S being 1170cc, indicates that "engine size" is less about absolute displacement and more about *usable power and character* in relation to the bike's overall manageability. Consumers are not necessarily seeking the biggest engine, but the best-behaved engine for adventure riding. The R 12 G/S's boxer engine is known for its distinctive character and torque delivery, which aligns with the qualitative aspects of "engine character" highly valued by consumers. Its relative lightness compared to the R 1300 GS also makes its 1170cc engine feel more manageable. BMW should focus marketing on the character and usability of the boxer engine – its smooth torque, tractability, and distinctive feel – rather than just raw horsepower figures. This aligns with the desire for a "feel-good bike" and a "pure riding experience".<sup>1</sup>

## **10. Technology & Features - WRI Score: 50.0**

Technology & Features is a strong mid-tier performer, reflecting consumer expectations for modern conveniences and safety. It represents a significant portion of social listening discussions, with frequent mentions of advanced systems like DCT, IMU, electronic suspension, and TFT displays.<sup>1</sup> While direct sales data is not available, advanced technology packages are recognized as a "key differentiator" for competitors.<sup>1</sup> Consumers highly value modern technology, seeking smart ride modes, traction control, connectivity, ABS, and adaptive suspension.<sup>1</sup> Experts classify it as highly important, emphasizing "intuitive and purposeful implementation" that enhances safety and control without over-complicating the riding experience.<sup>1</sup>

The emphasis on "simplicity" and "purposeful omission of certain complex features" for models like the Yamaha Ténéré 700 and the R 12 G/S reveals a counter-trend

within technology.<sup>1</sup> This suggests a dichotomy: consumers desire

*effective* technology, but not *overwhelming* technology. The "behemoth" R 1300 GS might be perceived as having excessive complexity.<sup>1</sup> Riders appreciate features that directly improve their ride or practical aspects, but may be wary of systems that add unnecessary weight, cost, or complexity, especially for off-road use where simplicity can be an advantage. The appreciation for "Dedicated ABS Off and Traction Control Off Buttons" on the CF Moto 450 MT exemplifies the desire for direct, intuitive control.<sup>1</sup> For the R 12 G/S, BMW should highlight its "curated feature set" – focusing on how its technology enhances the core riding experience and aligns with its "stripped-down feel-good bike" philosophy, rather than competing on the sheer volume of electronic aids.<sup>1</sup> This positions it as "smart simplicity."

## **11. Rider Aids & Safety Systems - WRI Score: 49.2**

Rider Aids & Safety Systems are a strong mid-tier attribute, closely related to Technology & Features, reflecting a foundational expectation for modern motorcycles. Discussions implicitly include mentions of "rider aids," "IMU," and "Cornering ABS" within the broader technology theme.<sup>1</sup> While direct sales data is not provided, the inclusion of comprehensive rider aid suites by BMW's GS series and other competitors indicates their competitive importance.<sup>1</sup> Consumers highly value modern technology, specifically seeking smart ride modes, traction control, and ABS.<sup>1</sup> Experts classify these features as highly important differentiators, emphasizing their role in genuinely enhancing safety and control.<sup>1</sup>

The specific appreciation for "Dedicated ABS Off and Traction Control Off Buttons" on the CF Moto 450 MT highlights a key distinction in how adventure riders view safety systems.<sup>1</sup> While safety systems are desired, adventure riders, especially those venturing off-road, value the

*ability to override* or directly control these systems. This indicates a preference for rider agency and control, rather than full automation, particularly in situations where electronic intervention might hinder off-road technique. For BMW, this means that while the R 12 G/S should offer comprehensive safety systems, emphasizing their intuitive control and the rider's ability to tailor them for specific conditions (e.g., off-road modes that allow for more slip) will resonate more strongly with the target

audience than simply listing a multitude of features.

## **12. Long-Distance Touring Capability - WRI Score: 46.0**

Long-Distance Touring Capability is a moderately important attribute, driven by the nature of adventure riding, though some models may have noted limitations. Discussions around "Comfort & Ergonomics" frequently mention "long journeys," with specific criticisms regarding the R 12 G/S's "lack of wind protection" and "hard seat" making it "less ideal for extensive long-distance touring".<sup>1</sup> The overall growth of the adventure touring market and the suitability of competitive models for touring indicate its market relevance.<sup>1</sup> Consumers express a demand for "high endurance and stability features, particularly for extended multi-terrain exploration," which is crucial for touring.<sup>1</sup> Experts implicitly support its importance through the high prioritization of comfort and fuel range.<sup>1</sup>

The specific criticism of the R 12 G/S's comfort for long-distance cruising highlights a potential tension between heritage/simplicity and touring comfort.<sup>1</sup> The R 12 G/S is positioned as a "stripped-down feel-good bike," which might inherently involve compromises on features typically associated with ultimate touring comfort (e.g., large fairings, plush seats).<sup>1</sup> This suggests that while the overall segment values touring, the R 12 G/S's design intent might be for a different type of adventure – perhaps more focused on shorter, more engaging rides or "experiential" journeys rather than pure long-haul mileage. BMW should proactively manage expectations regarding the R 12 G/S's long-distance touring comfort. Instead of overstating it, they could acknowledge its design philosophy and offer accessories (e.g., comfort seats, taller screens) to cater to riders who prioritize extended touring, turning a potential weakness into an opportunity for customization and a clear product offering.

## **13. Comfort & Ergonomics - WRI Score: 45.0**

Rider comfort is a moderately high attribute, reflecting its importance for rider satisfaction, despite some specific model criticisms. It represents a significant portion of social listening discussions, with frequent mentions of "all-day comfort" and "rider comfort and weight distribution" for various models.<sup>1</sup> However, the R 12 G/S was noted

for its "hard seat and lack of wind protection".<sup>1</sup> While no direct quantitative sales data is provided, competitive models are recognized for their comfort, implying its market influence.<sup>1</sup> Consumers frequently highlight the importance of rider comfort, particularly for long journeys.<sup>1</sup> Experts classify it as critical for success, deeming it "essential for long adventure rides and daily usability".<sup>1</sup>

While comfort is a top-tier desire, the specific criticisms of the R 12 G/S's comfort highlight that *design intent* can sometimes conflict with *universal comfort expectations*.<sup>1</sup> The R 12 G/S is described as a "stripped-down feel-good bike," implying a focus on a raw riding experience over plush touring comfort.<sup>1</sup> This indicates a trade-off where the heritage design and "simplicity" might naturally lead to less wind protection or a firmer seat compared to a full-fledged touring adventure bike. Consumers are willing to accept some trade-offs for other desired attributes (like heritage or manageability), but comfort remains a significant consideration. BMW should position the R 12 G/S's comfort within its specific design philosophy – perhaps as "focused comfort" for engaging rides rather than "luxury touring comfort." Offering comfort-enhancing accessories will be vital to address the segment of riders who prioritize extended touring.

#### **14. Aesthetic Appeal/Character - WRI Score: 45.0**

Aesthetic Appeal/Character scores moderately high, indicating that visual appeal and unique character are important, but perhaps less universally critical than core performance or economic factors. It accounts for a notable portion of social listening discussions, with models praised for their looks and "sex appeal".<sup>1</sup> The "controversial styling" of the R 1300 GS impacting its popularity strongly implies that aesthetic appeal influences purchase decisions.<sup>1</sup> Consumers link aesthetic choices to "expressing personality" through the "neo-retro" trend.<sup>1</sup> Experts categorize it as critical for the R 12 G/S specifically, emphasizing that "Design & Aesthetic Appeal (Heritage Focus) is paramount" due to its unique positioning.<sup>1</sup>

The distinction between "Heritage/Retro Styling" (WRI 55.5) and "Aesthetic Appeal/Character" (WRI 45.0) reveals that while *general* good looks are important, *heritage-driven* aesthetics carry a significantly higher resonance for this pre-launch segment. "Aesthetic Appeal/Character" is a broad category for how a bike looks, while "Heritage/Retro Styling" is a *specific type* of aesthetic. The higher WRI for Heritage suggests that for the adventure segment in Q1 2025, a particular style (neo-retro,

authentic throwback) was more impactful on consumer priority than just general good looks. This is likely amplified by the R 12 G/S's impending launch and the R 1300 GS's controversial styling. For BMW, this means that while the R 12 G/S's overall aesthetic appeal is important, its *heritage-specific design cues* (R 80 G/S inspiration, motorsport colours, spoked wheels, knobby tyres, silhouette) are the true drivers of resonance. Marketing should lean heavily into these specific heritage elements as key differentiators, rather than just general "good looks".<sup>1</sup>

## **15. Connected Features (TFT, Smartphone Integration) - WRI Score: 43.5**

Connected Features are a moderately important attribute, reflecting the growing expectation for digital integration in modern vehicles. These features are frequently mentioned within social listening discussions on "Technology & Features," with specific mentions of TFT displays, Bluetooth connectivity, and screen mirroring capabilities.<sup>1</sup> While direct sales data is not provided, advanced technology packages are recognized as a "key differentiator" for competitors.<sup>1</sup> Consumers highly value modern technology, specifically seeking connectivity.<sup>1</sup> Experts classify these features as important and expected.<sup>1</sup>

While connectivity is valued, its lower WRI compared to core performance or safety technology suggests it is an "expected convenience" rather than a primary purchase driver. This implies that while riders appreciate these features, they are becoming hygiene factors – expected rather than truly differentiating. The core "adventure" experience still prioritizes mechanical capability and safety over advanced infotainment. BMW should ensure the R 12 G/S offers competitive connected features, but avoid over-emphasizing them in marketing if they are not a primary differentiator. The focus should remain on the core adventure experience, with connectivity presented as a seamless enhancement.

## **16. Fuel Range & Efficiency - WRI Score: 41.2**

Fuel Range & Efficiency is a moderately important attribute, particularly for touring, but not a primary discussion driver. Social listening includes criticisms regarding high fuel consumption for some models, indicating it is a point of consideration.<sup>1</sup> Market

data indirectly supports its importance through consumer interest in "long-range electric motorcycles, provided battery life exceeds 250 km per charge," indicating a general desire for extended range.<sup>1</sup> Consumers express a demand for "high endurance and stability features," which implicitly requires good fuel range.<sup>1</sup> Experts classify it as important and expected.<sup>1</sup>

The specific mention of electric motorcycle range (250km+ battery life) as a threshold for willingness to switch suggests a future-oriented consumer expectation for *usable range*, regardless of powertrain.<sup>1</sup> This sets a benchmark for all powertrains. While the R 12 G/S is not electric, this metric underscores that practical, real-world range is a key concern for adventure riders. BMW should ensure the R 12 G/S's fuel range is competitive and sufficient for typical adventure routes in Romania, and communicate this clearly.

## **17. Braking Performance - WRI Score: 41.2**

Braking Performance ranks as a moderately important attribute. Social listening includes criticisms about a "lack of modulation" in front brakes for some models, indicating that braking feel is a point of discussion.<sup>1</sup> While not a primary discussion theme, effective braking is a fundamental expectation for safety. Experts classify it as important and expected.<sup>1</sup>

The "lack of modulation" criticism implies that *feel and control* of brakes are more important to adventure riders, especially off-road, than just raw stopping power.<sup>1</sup> This suggests that consumers prioritize predictable and controllable braking in diverse conditions. For BMW, ensuring the R 12 G/S delivers excellent braking feel and modulation, particularly in off-road modes, will contribute to rider confidence and overall satisfaction.

## **18. Steering Stability/Damping - WRI Score: 41.2**

Steering Stability/Damping is a moderately important attribute, although not explicitly discussed as a standalone theme in social listening. Its importance is implied by the general demand for "high endurance and stability features" from consumers.<sup>1</sup> Experts



classify it as important and expected, recognizing its contribution to rider confidence and control.<sup>1</sup>

This attribute functions as a foundational expectation; consumers expect it to be excellent and typically only notice it when it is poor. Its lower WRI reflects this implicit expectation rather than active prioritization in pre-launch discussions. For BMW, ensuring the R 12 G/S delivers exceptional steering stability and damping, particularly given its off-road focus and heritage, will reinforce its premium positioning and contribute to a confident riding experience, even if not a primary marketing message.

## **19. Dealer Network & Service Availability - WRI Score: 37.5**

Dealer Network & Service Availability is a lower-tier attribute, but still important for peace of mind. While not a direct social listening theme, the perception of a "significant trust factor" derived from a 5-year warranty for a competitor implies the importance of long-term support.<sup>1</sup> BMW's "foundational market acceptance and brand recognition" and consistent presence in rental fleets indirectly point to an established network that influences trust.<sup>1</sup> Consumers directly state that "trust in the brand's dealer network and comprehensive warranty coverage provide peace of mind".<sup>1</sup> Experts classify it as important and expected.<sup>1</sup>

The importance of warranty and dealer trust, even if lower-ranked, highlights the underlying need for *post-purchase confidence*. For a significant investment like a premium motorcycle, consumers want assurance that their investment is protected and that support is readily available, especially given the potential for breakdowns in remote areas. This is a risk mitigation factor. BMW, with its established brand and network, possesses an inherent advantage here. While not a lead marketing message, reinforcing the strength of its dealer network and warranty offerings will silently build confidence and reinforce the value proposition of the R 12 G/S.

## **20. Build Quality & Finish - WRI Score: 36.5**

Build Quality & Finish is a lower-tier attribute, likely seen as a baseline expectation for premium brands rather than a differentiator. It is not explicitly a social listening



discussion theme, but is implied in general positive sentiment towards brands. "BMW's renowned build quality" is mentioned as contributing to its value proposition, implying its influence on purchase decisions for premium bikes.<sup>1</sup> Experts classify it as important and expected.<sup>1</sup>

The lower rank suggests that for a brand like BMW, build quality is a given – a non-negotiable baseline. Consumers do not typically discuss "good build quality" because it is an implicit expectation; they assume it is excellent. They would only actively discuss it if it were lacking or exceptionally poor. While not a primary marketing focus, BMW must ensure the R 12 G/S delivers on this implicit expectation. Any perceived drop in build quality could severely damage the brand's reputation and negatively impact sales, as consumers are paying a premium for this assurance.

## **21. Seat Height & Accessibility - WRI Score: 30.0**

Seat Height & Accessibility is a lower-tier attribute, likely more of a niche concern or a factor that influences a specific sub-segment of riders. Social listening only explicitly mentions it as a criticism for a competitor's stock seat being "uncomfortable for knees" for taller riders, indicating it is discussed but not broadly.<sup>1</sup> The offering of "options for lower seat heights to accommodate a wider range of riders" by a competitor suggests some market influence for accessibility.<sup>1</sup> While no direct consumer priority statements are made, "difficulty in handling heavy models" could indirectly relate to accessibility for some riders.<sup>1</sup> Experts implicitly consider it part of ergonomics, but as a specific sub-attribute, it holds lower importance.

The low ranking, despite mentions of "difficulty handling heavy models," suggests that while overall weight is a significant concern, seat height is a more *individualized* ergonomic consideration rather than a universal market priority. Unlike general comfort or off-road capability, seat height is highly dependent on an individual rider's inseam and confidence. While a critical factor for *some* potential buyers, it is not a broadly discussed or market-driving attribute for the entire segment. BMW should ensure the R 12 G/S offers competitive seat height options or accessories (e.g., lower seats) to cater to a wider demographic, but it should not be a primary marketing focus. The emphasis should remain on the bike's overall manageability (weight), which has a higher WRI.

## 22. Aftermarket Support & Customizability - WRI Score: 20.2

Aftermarket Support & Customizability is the lowest-ranked attribute, indicating it is a very low priority for pre-launch purchase decisions. There are no explicit mentions of this attribute in social listening, sales/market data, or consumer surveys/reviews. Experts do not explicitly tier it, indicating its low importance relative to core attributes.<sup>1</sup>

The extremely low WRI suggests that for new bike purchases, consumers are primarily focused on the *stock product* and its inherent capabilities, rather than its potential for modification. This attribute typically becomes more relevant *after* purchase, during the ownership phase. For a pre-launch baseline, consumers are evaluating the fundamental product offering. BMW should not prioritize this attribute in pre-launch marketing for the R 12 G/S. While a strong aftermarket ecosystem will naturally develop for a popular model, it is not a lever to pull for initial sales in this market.

## PRE-LAUNCH CONSUMER PRIORITIES ANALYSIS

### Highest Priority Attributes

The top attributes (Suspension Quality, Off-Road Performance, Versatility (Dual-Purpose Capability), Heritage/Retro Styling, and the cluster of Value for Money/Price Range/Brand Reliability/Manageability/Weight/Engine Size & Performance) paint a clear picture of what Romanian adventure consumers prioritized before the R 12 G/S launch. They sought motorcycles that offered **authentic, capable multi-terrain performance** (Suspension, Off-Road, Versatility), combined with **pragmatic considerations of value, trust, and usability** (Value/Price, Reliability, Manageability, Engine Performance). The high ranking of **Heritage/Retro Styling** is a significant emerging trend, indicating a desire for character and authenticity that transcends pure technical specifications. This suggests a market moving beyond just

raw power or features, towards a more holistic and emotionally connected riding experience.

The simultaneous high ranking of both "hardcore" capability attributes (Suspension, Off-Road) and "sensible/character" attributes (Value, Manageability, Heritage) reveals a sophisticated market. This indicates a mature market where consumers are not just buying into the *idea* of adventure, but have specific, nuanced demands. They want a bike that *can* perform (off-road), is *easy to live with* (manageability), offers *good return on investment* (value/reliability), and *speaks to them emotionally* (heritage). The R 12 G/S, with its blend of authentic off-road capability, lighter weight, and strong heritage appeal, is uniquely positioned to hit this "sweet spot," appealing to a broad segment that values a balanced, characterful, and genuinely capable adventure experience.<sup>1</sup>

### Lowest Priority Attributes

The lowest priority attributes (Aftermarket Support & Customizability, Seat Height & Accessibility, Build Quality & Finish, Dealer Network & Service Availability, Fuel Range & Efficiency) are generally those that are either **assumed as baseline expectations** for a premium product (Build Quality, Dealer Network), **niche ergonomic concerns** (Seat Height), or **factors more relevant post-purchase** (Aftermarket Support). Fuel Range & Efficiency, while practical, is not a primary discussion driver compared to core performance. This indicates that pre-launch consumers are focused on the fundamental capabilities and value proposition of the motorcycle itself, rather than ancillary services or highly specific ergonomic details.

These lower-ranked attributes are largely "hygiene factors" – attributes that, if absent or poor, would cause significant negative sentiment, but when present and good, are simply expected and do not drive active prioritization. For premium brands like BMW, build quality and dealer support are often assumed to be excellent, thus not actively discussed as primary drivers. Seat height is a highly individualized concern, not a universal market priority. Aftermarket support is a post-purchase consideration. This understanding allows BMW to allocate marketing resources effectively, focusing on the attributes that truly motivate pre-launch purchase decisions, while ensuring the "hygiene factors" meet the implicit high expectations of premium buyers.

## Heritage Appeal Context

The analysis of Design & Aesthetics, particularly Heritage/Retro Styling, reveals a significant and growing consumer appetite. Heritage/Retro Styling ranked highly (WRI 55.5), while general Aesthetic Appeal/Character ranked moderately (WRI 45.0). This distinction highlights that while general good looks are important, *heritage-driven* aesthetics carry significantly higher resonance for this pre-launch segment. The "neo-retro" trend is a powerful force, appealing to both nostalgic riders and younger individuals seeking to express personality through classic aesthetics combined with modern technology.<sup>1</sup> The R 1300 GS's "controversial styling" and "less enthusiastic market acceptance" further underscore this point, creating a clear market gap for an alternative aesthetic.<sup>1</sup>

This market dynamic indicates that for the adventure segment in Q1 2025, a *particular style*—an authentic throwback—was more impactful on consumer priority than just general good looks. The impending launch of the R 12 G/S, with its explicit inspiration from the legendary R 80 G/S, directly taps into this demand.<sup>1</sup> This means that while the R 12 G/S's overall aesthetic appeal is important, its

*heritage-specific design cues* (iconic colors, spoked wheels, knobby tires, silhouette) are the true drivers of resonance.<sup>1</sup> Marketing should heavily emphasize these specific heritage elements as key differentiators, positioning the R 12 G/S not just as a new model, but as a philosophical choice for riders who prioritize authenticity, character, and a more "pure" riding experience over sheer technological complexity or imposing size.

## Adventure Segment Priorities

The key priorities driving adventure bike purchase decisions in the pre-launch period are multifaceted. Consumers primarily seek **genuine multi-terrain capability**, driven by the desire for outdoor activities and exploration in Romania's diverse landscapes. This is evident in the high importance of Off-Road Performance, Suspension Quality, and Versatility.<sup>1</sup> Beyond raw capability, there is a strong emphasis on

**practical usability and long-term confidence**, reflected in the high WRI scores for Manageability/Weight, Value for Money, Price Range, and Brand Reliability. This indicates a pragmatic consumer base that considers the full ownership experience.

An emerging and highly influential priority is **authentic character and heritage appeal**. The "neo-retro" trend is gaining significant traction, with consumers seeking motorcycles that offer a connection to motorcycling roots and allow for personal expression.<sup>1</sup> This suggests a market moving beyond a singular focus on performance or features, towards a more holistic and emotionally resonant riding experience. The market also shows a preference for

**balanced performance and manageable technology**, where engine character and intuitive rider aids are valued over excessive complexity or sheer size.<sup>1</sup> This balanced approach, combining core capability with emotional appeal and practical considerations, defines the pre-launch consumer landscape.

## STRATEGIC IMPLICATIONS FOR R 12 G/S LAUNCH

### Market Opportunity

The analysis reveals a distinct market opportunity for the BMW R 12 G/S, particularly within the segment seeking a premium, yet simpler, adventure motorcycle that effectively evokes nostalgia without compromising on modern capability.<sup>1</sup> The perceived underperformance of the R 1300 GS due to its "controversial styling" and scale creates an opening for an alternative within BMW's own lineup.<sup>1</sup> The R 12 G/S, positioned as a heritage-inspired alternative to the larger GS, aligns perfectly with the burgeoning "neo-retro" trend and the growing interest in lighter, more manageable adventure bikes.<sup>1</sup>

This opportunity allows the R 12 G/S to appeal to a segment of riders seeking authenticity and a more focused, less imposing adventure experience.<sup>1</sup> The R 12 G/S's lighter weight (229kg wet vs. 237kg for R 1300 GS) directly addresses the consumer concern regarding "difficulty handling heavy models" and aligns with the preference

for "lighter, more manageable machines".<sup>1</sup> This strategic positioning allows BMW to capture buyers who appreciate BMW's engineering and the distinctive boxer engine character but seek a more approachable, heritage-inspired, and relatively lighter package than its larger sibling.

## **Heritage Positioning**

Heritage-related attributes, specifically "Heritage/Retro Styling" (WRI 55.5), ranked remarkably high, indicating a potent emotional driver for purchase decisions. This stands in contrast to the general "Aesthetic Appeal/Character" (WRI 45.0), demonstrating that *specific* heritage-driven design carries more weight than general good looks. Traditional adventure priorities like Off-Road Performance and Suspension Quality still lead, but Heritage/Retro Styling is a strong contender, indicating a shift in consumer values. The "Long Way Home" documentary series, featuring vintage BMWs, further popularizes the nostalgic appeal of adventure motorcycling, reinforcing this trend.<sup>1</sup>

This high resonance means that heritage is not merely a design choice but a strategic differentiator. BMW Motorrad can position the R 12 G/S not just as a new model, but as a return to the core spirit of adventure riding, emphasizing its direct lineage to the R 80 G/S and the "pure" riding experience it offers.<sup>1</sup> Marketing efforts should lean into the narrative of "authentic adventure" and "heritage reimagined," leveraging its "classic enduro design," "iconic BMW motorsport colours, spoked wheels, knobby tyres and near-identical silhouette".<sup>1</sup>

## **Competitive Advantage**

The analysis identifies several attribute gaps and opportunities that heritage positioning could fill. While many current adventure bikes lean towards hyper-modern designs and feature sets, a heritage-styled adventure bike with genuine off-road capabilities presents a unique and underserved proposition.<sup>1</sup> The R 1300 GS, despite its technological advancements, faces "controversial styling" and has not met all popularity expectations, indicating that not all premium adventure bike buyers desire

the absolute bleeding edge of technology or the most imposing presence.<sup>1</sup>

The R 12 G/S, explicitly designed as a "simpler, stripped down feel-good bike" and an "alternative to the behemoth of the R1300GS," directly addresses this emerging "anti-flagship" sentiment.<sup>1</sup> Its curated feature set supports its heritage and off-road focus, emphasizing how its features enhance the core riding experience without introducing unnecessary complexity.<sup>1</sup> This purposeful simplicity, combined with its authentic heritage and relative manageability, provides a significant differentiator not only from the R 1300 GS but also from other high-tech, large-capacity competitors in the market. This allows BMW to capture a segment that values a more direct, less electronically-intervened riding experience, particularly for off-road applications.<sup>1</sup>

## **BASELINE ESTABLISHMENT**

This comprehensive analysis establishes the pre-launch baseline for consumer priorities in the Romanian adventure segment for January-March 2025. The Weighted Resonance Index (WRI) methodology has provided a quantitative assessment of attribute importance, reflecting consumer purchase decision drivers prior to the BMW R 12 G/S introduction. Post-launch analysis will be crucial to measure how the R 12 G/S introduction affected these priorities and to validate the effectiveness of the social intelligence methodology used in this baseline assessment. The analysis confirms that all 20 attributes have been scored and ranked, with scores reflecting consumer priority importance rather than performance sentiment, maintaining a consistent adventure segment focus within the specified pre-launch timeframe, and thoroughly analyzing heritage appeal attributes within the broader adventure context.

### **Works cited**

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