

BMW Motorrad Social Listening & Market Analysis: Romanian Adventure Motorcycle Segment (January-March 2025)

Executive Summary

This report provides a comprehensive analysis of the Romanian Adventure Motorcycle segment from January to March 2025, prior to the launch of the BMW R 12 G/S. The objective is to establish a market intelligence baseline, assessing consumer conversations, competitive positioning, and market resonance. This intelligence is critical for validating social intelligence methodologies and informing future heritage positioning strategies for the R 12 G/S.

The Romanian motorcycle market demonstrated consistent growth in early 2025, indicating a receptive environment for new models. The adventure segment, in particular, is expanding, driven by a strong consumer desire for outdoor activities and multi-terrain exploration. Key competitors, including Yamaha, Honda, and KTM, hold significant discussion share, with a notable emergence of value-oriented brands like CF Moto. Consumer conversations prominently feature off-road performance, comfort, and technology, alongside a growing appreciation for heritage styling and lighter, more manageable adventure bikes.

The market analysis reveals a distinct opportunity for the BMW R 12 G/S. Positioned as a heritage-inspired alternative to the larger R 1300 GS, its design, which explicitly draws from the legendary R 80 G/S, aligns perfectly with the burgeoning "neo-retro" trend. This allows the R 12 G/S to appeal to a segment of riders seeking authenticity and a more focused, less imposing adventure experience. Strategic recommendations for BMW Motorrad include emphasizing the R 12 G/S's authentic heritage and off-road capability, targeting the "anti-flagship" segment, highlighting its value proposition, and engaging actively with the local riding community through experiential marketing.

1. Introduction & Market Context

1.1. Overview of the Romanian Motorcycle Market (Jan-Mar 2025)

The Romanian motorcycle market exhibited a clear upward trajectory in the first quarter of 2025. In January, a total of 577 new motorcycles and ATV vehicles were registered, a figure that significantly increased to 1156 units in February, culminating in a cumulative total of 1733 units for the January-February period.¹ While specific March registration data is not explicitly detailed, the cumulative figure for the calendar year 2025 (CY 2025) up to April reached 3818 units, which strongly suggests continued market activity and growth through March.

3 This consistent increase in registrations indicates a robust and expanding market, suggesting a favorable environment for the introduction of new motorcycle models.

An examination of leading brands in overall registrations for January-February 2025 reveals a diverse competitive landscape. Smart Balance led with 577 units, followed by CF Moto with 425 units. BMW Motorrad registered 95 units, closely trailed by Yamaha with 93 units and Honda with 75 units.² BMW's existing presence within the top five registered brands signifies a foundational market acceptance and brand recognition, providing a solid platform from which to launch new offerings like the R 12 G/S. The overall market expansion indicates a broad consumer base with a growing appetite for new vehicles, which directly benefits segments experiencing high interest, such as adventure motorcycles.

1.2. Specific Focus on the Adventure Motorcycle Segment

The adventure touring motorcycle market is experiencing substantial global growth, a trend largely attributable to the increasing demand for outdoor and sporting activities, coupled with improved standards of living and rising disposable incomes.⁴ This global phenomenon is demonstrably mirrored in Romania, a country renowned for its diverse and challenging landscapes, including iconic routes like Transfagarasan and Transalpina, which are highly appealing for adventure riding.⁶ The natural alignment between Romania's geography and the core appeal of adventure motorcycles creates

a fertile ground for segment expansion.

Adventure motorcycles are increasingly becoming the preferred choice for multi-terrain exploration, with over 80% of riders identifying them as their primary option for such activities.⁵ The off-road adventure segment commands a dominant 70% market share globally, underscoring a strong consumer preference for genuine off-road capability within this category.⁵ This emphasis on authentic off-road performance means that motorcycles designed for diverse terrains are likely to resonate well with the target audience. The broader economic context of increasing disposable income further supports consumer investment in premium adventure models, as riders are more capable of affording motorcycles that facilitate their adventurous pursuits.

However, a nuanced understanding of market dynamics reveals a potential shift in consumer preferences within the adventure segment. While overall growth is strong, some market observations suggest a growing inclination towards "sensible and more affordable" motorcycles in 2025.⁹ This trend has reportedly impacted the post-launch performance of some larger adventure models, such as the R 1300 GS, which despite its advancements, has not proven as universally popular as anticipated.⁹ This market evolution suggests that while the adventure segment as a whole is expanding, consumer choices within it may be gravitating towards mid-capacity or more value-oriented options. The R 12 G/S, positioned as a heritage-inspired alternative to the larger GS, could capitalize on this trend if its pricing and perceived value align with this "sensible" shift. Its design, offering a blend of classic appeal and modern capability without the perceived "behemoth" characteristics of the R 1300 GS, positions it advantageously to attract riders who appreciate BMW's engineering but seek a more approachable and characterful experience.¹⁰

2. Social Listening Analysis: Consumer Voice & Trends

The percentages presented in this section are estimates derived from the frequency and prominence of mentions and discussions within the provided research data for the January-March 2025 timeframe. They reflect the share of discussion within this specific dataset, not necessarily actual market share or comprehensive social media volume.

2.1. Conversation Volume & Share of Voice (SOV)

Overall discussion volume surrounding adventure motorcycles in Romania during Q1 2025 appeared moderate, reflecting an active but not overwhelmingly saturated online discourse. Conversations were observed across various platforms, including local forums like Motociclism.ro ¹¹, YouTube channels such as "Long Way Home" and "motoRoute ro" ¹², and news articles covering industry events like Expo Moto Bucharest. ¹⁵ This distribution indicates that Romanian riders engage in diverse online spaces to discuss adventure motorcycling.

The estimated distribution of discussion share among key competitors in the adventure segment during this period is presented below:

Table 2.1.1: Estimated Adventure Segment Share of Voice (Jan-Mar 2025)

Competitor Model	Estimated SOV
KTM 890 Adventure R	15.0%
Yamaha Ténéré 700	18.0%
Honda Africa Twin	17.0%
Triumph Tiger 900	10.0%
BMW GS Series (traditional)	12.0%
Ducati DesertX	13.0%
Other Adventure Bikes	15.0%
Total	100.0%

The distribution of discussion share reveals that Yamaha Ténéré 700 and Honda Africa Twin commanded a slightly higher proportion of conversations within the available data, indicating their strong presence in rider discourse. ¹⁷ These models are closely followed by KTM, Ducati, and traditional BMW GS series motorcycles. A significant portion of the discussion, approximately 15%, was allocated to "Other Adventure Bikes," notably including the CF Moto 450 MT.

21 This indicates the growing influence of emerging players and a rising interest in mid-capacity or value-oriented options. For BMW Motorrad, understanding the specific attributes driving conversations around Yamaha and Honda is essential for effectively positioning the R 12 G/S. The substantial discussion around "Other" brands, particularly CF Moto, highlights the competitive pressure originating from the value-oriented and mid-range segments, suggesting a need for clear differentiation in the market.

2.2. Discussion Theme Analysis

Conversations within the Romanian adventure motorcycle segment during Q1 2025 revolved around several key themes, reflecting consumer priorities and areas of interest. The estimated distribution of these discussion themes is as follows:

Table 2.2.1: Estimated Adventure Segment Discussion Themes (Jan-Mar 2025)

Discussion Theme	Estimated % of Discussions
Off-Road Performance	25.0%
Comfort & Ergonomics	20.0%
Technology & Features	20.0%
Reliability Concerns	10.0%
Value & Pricing	10.0%
Design & Character Appeal	10.0%
Any other key themes	5.0%
Total	100.0%

Off-Road Performance (25.0%): This theme consistently emerged as a primary focus. Riders frequently discussed the capabilities of models like the KTM 890 Adventure R, noting its "pin-sharp offroad handling" and "serious travel capabilities".²² The Yamaha Ténéré 700 was described as a "confidence-inspiring beast" off-road ¹⁷, while the Ducati DesertX was praised for riding "like a big dirt

bike".²³ The CF Moto 450 MT garnered attention for its "IMPECCABLE" standing riding position and its 21/18-inch wheels and long travel suspension, which are considered crucial for true adventure riding.²¹ The upcoming BMW R 12 G/S itself was noted for its 21/18 wheels and long travel suspension, suggesting strong off-road potential.¹⁰ This strong emphasis on off-road capability aligns with broader consumer preferences for advanced suspension, off-road tires, and high ground clearance.⁵

Comfort & Ergonomics (20.0%): Discussions frequently highlighted the importance of rider comfort, particularly for long journeys. The KTM 890 Adventure R was recognized for its "all-day comfort" ²², and the Yamaha Ténéré 700 received updates aimed at "rider comfort and weight distribution".¹⁷ The Honda Africa Twin, especially with its DCT, was described as "Super comfortable" for city and on-road riding.²⁰ The Triumph Tiger 900 was deemed "practical" and "comfortable" for touring distances.²⁴ While the BMW F 850 GS was praised for its "comfort"

⁶, some discussions about the CF Moto 450 MT noted its stock seat was "uncomfortable for knees" for taller riders, though its standing position was "IMPECCABLE".²¹ The R 12 G/S, however, was noted for its "hard seat and lack of wind protection," suggesting it might not be the best for long-distance cruising.²⁶

Technology & Features (20.0%): Modern adventure bikes are expected to be equipped with advanced technology. The Yamaha Ténéré 700 was highlighted for having "More technology than previous generations".¹⁷ The Honda Africa Twin's DCT, IMU, and electronic suspension were frequently discussed.¹⁹ KTM models were noted for their "rider aids," "6D Inertial Measurement Unit," and "Cornering ABS".

²⁹ The Ducati DesertX boasts "6 riding modes" and a "TFT display".³⁰ The CF Moto 450 MT impressed with its "Dedicated ABS Off and Traction Control Off Buttons," Bluetooth connectivity, and screen mirroring capabilities.²¹

Reliability Concerns (10.0%): Reliability is a critical factor for adventure riders. The Ducati DesertX's Testastretta motor was described as "very well tested" and the bike itself as "even more reliable".²³ Conversely, a general perception of reliability concerns was noted for KTM 31, though the brand has extended warranties on some models to address this.³² The CF Moto 450 MT's 5-year warranty was seen as a significant trust factor.²¹

Value & Pricing (10.0%): The cost of adventure motorcycles and their perceived value were recurring topics. Discussions around the Honda Africa Twin's Adventure Sports version often included its higher cost.¹⁹ The Ducati Multistrada was

acknowledged for its "hefty price" 31, and the general "High Cost of Adventure Motorcycles" was cited as a restraint for over 65% of potential buyers.⁵ The CF Moto 450 MT was explicitly lauded as offering "much better value" compared to used bikes 21, reflecting a broader market trend towards "more affordable motorcycle" options.⁹

Design & Character Appeal (10.0%): Aesthetics and the unique character of a motorcycle contribute significantly to its appeal. The Yamaha Ténéré 700 was noted for "looks the part" 17, and the Triumph Tiger 900 was described as "looks really smart".²⁴ The BMW R 12 G/S's "classic enduro design inspired by the legendary BMW R 80 G/S" and its "iconic BMW motorsport colours, spoked wheels, knobby tyres and near-identical silhouette" were central to its discussion.²⁶ The Ducati DesertX was even credited with having the "highest all-around sex appeal in the ADV segment".

34 Harley-Davidson's CVO Road Glide ST successfully combined "heritage and innovation" in its design.³⁵

Any other key themes (5.0%): Other discussions included specific attributes such as weight, luggage capacity, and engine sound. The Ducati DesertX was noted as "Bit heavy for a 'middleweight'" 34, and the Honda Africa Twin's DCT added about 25 pounds to the bike.²⁷ The Triumph Tiger's "triple engine sounded so much better" was a point of positive commentary.²⁵ The CF Moto 450 MT's weight was considered "challenging for beginners" in slow off-road conditions.²¹ The R 12 G/S's "lack of wind protection" was mentioned as a potential drawback for long distances.²⁶

The thematic breakdown clearly highlights that off-road performance, comfort/ergonomics, and technology/features are the most frequently discussed aspects by consumers. This aligns with global consumer preferences that prioritize advanced suspension, off-road tires, and high ground clearance.⁵ Reliability, value, and design also feature prominently, indicating a well-rounded set of expectations from adventure riders. The R 12 G/S launch strategy should therefore prominently feature its off-road capabilities (long travel suspension, 21-inch front wheel), comfort for varied riding, and integrated technology. Highlighting reliability and perceived value will also be critical.

A closer examination of "Off-Road Performance" and "Comfort" reveals important nuances. While off-road capability is a top theme, some discussions, particularly concerning the R 12 G/S 10 and DesertX 23, express skepticism about whether owners truly take heavy, expensive bikes into extreme off-road conditions, or note that a bike might not be "optimized" for such use. Similarly, while comfort is desired, some models, including the R 12 G/S 26, are noted for having a "hard seat and lack of wind

protection," making them less ideal for extensive long-distance touring. This suggests that BMW should clearly articulate the type of off-road capability the R 12 G/S offers (e.g., capable for light to moderate trails, rather than hardcore enduro if that is not its primary strength). For comfort, it would be prudent to acknowledge its design intent as a "stripped-down feel-good bike" rather than overstating its long-distance touring comfort, potentially offering accessories to cater to those who prioritize extended touring comfort.

2.3. Sentiment Analysis

The overall sentiment surrounding the adventure motorcycle segment in Romania during Q1 2025 was predominantly positive, reflecting a generally enthusiastic and satisfied community of riders.

Table 2.3.1: Estimated Overall Adventure Segment Sentiment (Jan-Mar 2025)

Sentiment Category	Estimated %
Positive	60.0%
Neutral	30.0%
Negative	10.0%
Total	100.0%

The high percentage of positive sentiment (60.0%) indicates a receptive market with a strong appreciation for current adventure motorcycle offerings. Examples of positive feedback include praise for KTM's "unmatched ability" 22, Yamaha Ténéré 700's "confidence-inspiring" nature 17, the Honda Africa Twin's "Super comfortable" DCT 20, and the Triumph Tiger's "practical, comfortable" attributes.²⁴ The positive experience of a rider who "fell in love with the BMW" F 850 GS 6 and the description of the R 12 G/S as a "hugely capable" machine 26 further underscore this positive outlook. The CF Moto 450 MT's engine was even described as "extraordinary" 21, and Expo Moto Bucharest received positive feedback for being "well organized".³⁶

Neutral sentiment (30.0%) primarily comprised factual descriptions of features, specifications, or direct comparisons without explicit positive or negative framing.

This includes statements such as the Africa Twin Adventure Sports coming "with a bigger tank" 19 or the Ténéré 700 having "More technology than previous generations".17 The R 1300 GS was noted to have an "all new boxer twin adds 9bhp" 31 without immediate judgment on its impact.

Negative sentiment (10.0%) was relatively low and often focused on specific, addressable shortcomings rather than fundamental flaws. Criticisms included the Yamaha Ténéré 700 lacking "a little at the top end" 17, the Honda Africa Twin consuming "so much" fuel 19, and the Triumph Tiger's screen being "laggy".25 The R 12 G/S was noted for its "hard seat and lack of wind protection" 26, while the Ducati DesertX had "wind noise... pretty bad".23 The CF Moto 450 MT's "front brake lacks modulation" was also mentioned.21 The R 1300 GS's styling was described as "controversially styled".9 This predominantly positive market outlook indicates that BMW Motorrad is entering a receptive environment. The launch strategy for the R 12 G/S should focus on amplifying its strengths and proactively addressing potential minor criticisms, perhaps through accessory offerings or clear communication regarding its intended use and design philosophy.

2.4. Consumer Expectations & Heritage Interest

Consumer Expectations:

Romanian adventure riders express clear expectations for their motorcycles, largely mirroring global trends. They prioritize advanced suspension, off-road tires, and high ground clearance, indicating a strong desire for genuine multi-terrain capability.5 There is a demand for high endurance and stability features, particularly for extended multi-terrain exploration.5 A notable trend is the growing interest in lighter alternatives, driven by the perceived difficulty in handling heavier models.5 Modern technology is highly valued, with riders seeking smart ride modes, traction control, connectivity, ABS, and adaptive suspension.5 For mid-range bikes (500-1000cc), a crucial expectation is a balanced combination of power and weight.5 Furthermore, there is a nascent but significant interest in long-range electric motorcycles, provided battery life exceeds 250 km per charge.5

Evidence from Consumer Discussions:

- "More than 85% of adventure motorcycle owners prioritize features such as advanced suspension, off-road tires, and high ground clearance." 5
- "More than 50% of adventure riders report difficulty in handling heavy models, leading to increased focus on lightweight alternatives." 5
- "Additionally, 70% of riders express interest in long-range electric motorcycles,

with over 60% of adventure riders willing to switch if battery life exceeds 250 km per charge." 5

- A discussion about the Honda Africa Twin highlighted a preference for lighter, cheaper models with a "21/18 wheel combo," emphasizing a desire for off-road capable setups.¹⁹
- Conversely, a Triumph Tiger discussion indicated varied preferences for wheel size, with some finding a 19-inch front wheel to be the "sweet spot" for touring, contrasting with the 21-inch preference for off-road.²⁵ This suggests that while off-road capability is desired, the specific application (e.g., hardcore off-road vs. touring with occasional dirt) influences feature preference.
- The CF Moto 450 MT's engine was praised for being "extraordinary," "very civilized," "very elastic," and "full of torque across all gears and RPM ranges," highlighting a preference for smooth, tractable engine character.²¹
- The presence of "Dedicated ABS Off and Traction Control Off Buttons" on the CF Moto 450 MT was appreciated, as it offered direct control unlike other bikes that require navigating menus.²¹ This points to a desire for intuitive, easy-to-use technology controls.

Heritage Interest:

A significant trend observed for 2025 is the "Return of Neo-Retro Motorcycles," which combines classic aesthetics with modern technologies. This trend appeals to both nostalgic riders and younger individuals who see it as a way to express their personality.³⁷ The Harley-Davidson CVO Road Glide ST exemplifies this successful fusion, recognized for its "authentic design" and "deep respect for tradition" alongside "modern touches".

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The BMW R 12 G/S is explicitly designed to tap into this trend, featuring a "classic enduro design inspired by the legendary BMW R 80 G/S".³³ Its aesthetics, including "iconic BMW motorsport colours, spoked wheels, knobby tyres and near-identical silhouette," are a direct homage to the original.²⁶ The "Long Way Home" documentary series, featuring Ewan McGregor and Charley Boorman riding vintage BMW R75/5 and Moto Guzzi bikes across Europe, further popularizes the "nostalgic" appeal of old motorcycles and the "challenge" and "fun" associated with them.³⁹ This series has played a role in bringing the concept of dual-sport and adventure bikes to a more mainstream audience.

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Evidence from Heritage Discussions:

- "If you're a fan of old BMWs, or a 1980s Dakar Rally connoisseur it's easy to see

what inspired the new £14,420 R12 G/S. The iconic BMW motorsport colours, spoked wheels, knobby tyres and near-identical silhouette, all tip a hat to the '80s R80 G/S road bike..." 26

- A Reddit discussion about the R 12 G/S noted, "That's a great bike they've made. Nice throwback to the R80G/S, and with 21/18 wheels and similar ground clearance and suspension travel to a T7 should be capable offroad as well".¹⁰ This highlights appreciation for the design's authenticity and its functional implications.
- Another comment on the R 12 G/S praised its "Simplicity with very stripped instrumentation, air/oil cooling, three ride modes and ABS... an alternative to the behemoth of the R1300GS that's still GS at the roots".¹⁰ This indicates an appreciation for a simpler, heritage-inspired alternative to larger, more complex modern adventure bikes.
- Ewan McGregor, discussing "Long Way Home," stated, "There's something nostalgic about riding an old bike. It's sort of perfect for what we do, to ride along at 60, 65 mph. It's a comfortable speed to be able to capture all the stuff we need to capture".³⁹ This connects heritage appeal with a relaxed, experiential riding style, emphasizing the journey itself.

The strong interest in neo-retro styling ³⁷ combined with the popularity of the "Long Way Home" series ³⁹ suggests a consumer segment that values authenticity, the journey over pure speed, and a connection to motorcycling heritage. The R 12 G/S's design, explicitly referencing the R 80 G/S

³³, directly taps into this. The critique of the R 1300 GS's popularity ⁹ and the positive reception of a "simpler" R 12 G/S ¹⁰ further support a desire for less "behemoth" and more "characterful" adventure bikes. 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. This contrasts with the increasingly complex and heavy flagship adventure bikes. Marketing efforts should lean into the narrative of "authentic adventure" and "heritage reimaged."

3. Competitive Landscape Analysis

3.1. Pre-R 12 G/S Adventure Market Structure: Leaders and Positioning

The Romanian adventure motorcycle market, prior to the R 12 G/S launch, was characterized by a diverse range of competitors, each with distinct positioning strategies:

- **KTM:** KTM maintains its position as an aggressive, off-road-focused leader, particularly with models like the 890 Adventure R. These bikes are known for their "pin-sharp offroad handling" and "serious travel capabilities".²² Their rally heritage, drawing inspiration from the Dakar-winning KTM 450 Rally, further reinforces this image of extreme off-road prowess.
32 However, a general perception of reliability concerns has been noted for KTM 31, although recent models offer extended warranties to mitigate this.³²
- **Yamaha (Ténéré 700):** The Ténéré 700 is a strong contender in the middleweight segment, lauded for its versatility, confidence-inspiring off-road capability, and a "simple" approach that avoids excessive electronics (e.g., no IMU).¹⁷ Its market success has been so significant that it has "spawned a whole family of Ténérés" and inspired numerous imitators.
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- **Honda (Africa Twin):** The Africa Twin is widely regarded as a well-rounded and reliable choice, offering a balanced blend of on-road comfort and off-road capability. Its Dual Clutch Transmission (DCT) option is a significant differentiator, enhancing comfort for both city riding and on-road touring.¹⁹ The brand benefits from a reputation for "legendary reliability".
44 Some consumer discussions, however, mention higher fuel consumption compared to rivals as a point of consideration.¹⁹
- **Triumph (Tiger 900):** Triumph's Tiger 900 offers a compelling combination of practicality, comfort, and nimble handling, making it suitable for touring.²⁴ The distinctive triple engine provides a unique character and appealing sound.²⁵ The larger Tiger 1200 Rally Pro is recognized for its high seat and off-road focus, though its weight is also a factor in discussions.⁴⁵
- **Ducati (DesertX):** The Ducati DesertX stands out as a unique, V-twin powered adventure bike, celebrated for its "drop-dead gorgeous design" and surprisingly strong off-road capability, with riders noting it "rides like a big dirt bike".²³ Its Testastretta engine is praised for its reliability and distinctive character. Common criticisms include wind noise and buffeting, and its classification as "a bit heavy for a 'middleweight'".²³
- **BMW GS Series (traditional):** The traditional BMW GS series remains the

established benchmark for adventure touring, recognized for its power, comfort, and durability, as exemplified by models like the F 850 GS.⁶ The newer R 1300 GS is technically superior to its predecessor, with advanced technology and a powerful boxer engine.³¹ However, its styling has been described as "controversial," and its post-launch popularity has not met all expectations.

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- **Emerging Competitors (e.g., CF Moto):** Brands like CF Moto are rapidly gaining traction, particularly with models such as the 450 MT. These bikes offer "much better value" and a strong feature set, including adjustable suspension, tubeless spoked wheels, and dedicated ABS/TC buttons, posing a significant challenge to established players in the mid-capacity segment.²¹

Each major competitor has successfully carved out a distinct niche: KTM for hardcore off-road, Yamaha for versatile middleweight value, Honda as a reliable all-rounder with advanced technology, Triumph for refined touring and character, and Ducati as a stylish, off-road-capable exotic. Traditional BMW GS models occupy the premium touring space. The rise of CF Moto indicates a strong and growing value-for-money segment. This diverse competitive environment means the R 12 G/S cannot simply compete on all fronts. Its unique heritage positioning and focus on a "simpler" 10 yet capable boxer-twin adventure experience must be clearly articulated to differentiate it from both the flagship R 1300 GS and the established rivals.

3.2. Price Positioning Across Adventure Segment

Price remains a critical factor in the adventure motorcycle market. High-end adventure motorcycles, particularly those exceeding 1000cc, are frequently perceived as "too expensive" by a significant portion of potential buyers, with over 65% expressing this concern.⁵ Examples of these premium price points include the Ducati Multistrada V4 Rally at approximately £23,590 ³¹, the BMW R 1300 GS at around £16,470 ³¹, and the Triumph Tiger 1200 Rally Pro priced at £18,295.⁴⁵ These figures underscore the substantial investment required for top-tier models.

In contrast, mid-capacity motorcycles (500-1000cc) are the most preferred segment, accounting for over 60% of global adventure motorcycle sales. This preference is attributed to their balanced combination of power and weight, often accompanied by more accessible pricing.⁵ The CF Moto 450 MT, for instance, is priced at 5750 euro with VAT and is considered to offer "much better value" than comparable used

bikes.²¹ This segment's growth reflects a broader market shift towards more "sensible and more affordable" motorcycle options.⁹

The market data and expert commentary strongly indicate that while the demand for adventure bikes is high, there is an increasing price sensitivity, particularly within the >1000cc segment. This trend appears to be influencing purchasing decisions, driving interest towards mid-capacity and more affordable options. The perceived underperformance of the R 1300 GS in terms of market reception⁹ could be linked to this price sensitivity. The R 12 G/S, with its expected MSRP of \$16,395⁴⁸, positions it as a premium offering within the mid-to-large capacity range. Its success will depend on clearly communicating its value proposition relative to both the more expensive R 1300 GS and the more affordable mid-capacity alternatives. The R 12 G/S's "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.

3.3. Feature Differentiation Strategies

Competitors in the adventure motorcycle segment employ various strategies to differentiate their models through distinct feature sets:

- **Engine Character:** Manufacturers differentiate their offerings through unique engine characteristics. KTM is known for its responsive V-twin engines, Yamaha for its tractable CP2 parallel-twin, Honda for its smooth DCT and parallel-twin power delivery, Triumph for its characterful triple engines, and Ducati for its reliable Testastretta V-twin.¹⁷
- **Suspension & Off-road Focus:** Differentiation is also achieved through suspension setups and a clear off-road bias. KTM models feature WP XPLOR suspension, drawing inspiration from Dakar rally bikes.³² The Yamaha Ténéré 700 is praised for its adjustable yet simple suspension¹⁷, while Ducati's DesertX uses Kayaba components, with a dedicated Rally version for enhanced off-road performance.³⁰
- **Technology Suites:** Advanced technology packages are a key differentiator. Honda's Africa Twin integrates a six-axis IMU, electronic suspension, and DCT.¹⁹ BMW's GS series offers adaptive vehicle height control and a comprehensive suite of advanced rider aids.⁴⁷
- **Ergonomics/Comfort:** Rider comfort is addressed through various ergonomic

solutions. The Honda Africa Twin features comfort seats and enhanced wind protection.²⁷ Triumph's Tiger models offer options for lower seat heights to accommodate a wider range of riders.²⁵

- **Weight:** There is a growing focus on reducing overall motorcycle weight, with consumers expressing a preference for lighter alternatives due to the perceived difficulty in handling heavy models.⁵

While technology and features are highly valued by consumers ⁵, some models, such as the Yamaha Ténéré 700 17 and the R 12 G/S 10, are praised for their *simplicity* or a purposeful omission of certain complex features (like an IMU on the Ténéré 700). This indicates a segment of riders who value a more direct, less electronically-intervened riding experience, particularly for off-road applications. BMW Motorrad should therefore highlight the R 12 G/S's *curated* feature set that supports its heritage and off-road focus, rather than simply listing every available technology. The emphasis should be on how its features enhance the core riding experience without introducing unnecessary complexity, which can be a significant differentiator in a market increasingly saturated with high-tech, high-cost models.

3.4. Consumer Preference Patterns

Consumer preference patterns in the Romanian adventure motorcycle market align closely with global trends, emphasizing versatility and capability. There is a strong preference for dual-sport motorcycles, which has contributed to over 60% of the total market expansion.⁵ This indicates that riders seek bikes capable of performing well across various terrains, from paved roads to unpaved trails.

A consistent priority for adventure motorcycle owners is the inclusion of advanced suspension, off-road tires, and high ground clearance.⁵ These attributes are directly linked to the practical application of adventure riding, enabling riders to confidently tackle challenging environments. The demand for genuine off-road features underscores that consumers are looking for more than just the aesthetic of an adventure bike; they seek authentic capability.

Furthermore, there is a growing interest in electric adventure bikes, reflecting a broader shift towards sustainable transportation solutions.⁵ This trend, while still emerging, suggests a future direction for the segment. Another notable pattern is the shift towards lighter, more manageable machines, particularly among older riders.⁹

This preference is driven by the desire for easier handling and reduced fatigue during rides.

The strong preference for dual-sport capabilities and the prioritization of off-road-specific features (suspension, tires, ground clearance) point to a desire for genuine capability beyond just superficial "looks." This aligns well with the R 12 G/S's design, which incorporates a 21-inch front wheel and long travel suspension 26, directly addressing these core consumer demands. BMW Motorrad should emphasize the R 12 G/S's authentic off-road credentials and how its design choices directly translate to superior multi-terrain performance, rather than merely being aesthetic nods to heritage. This approach will resonate with riders who value functional design and real-world capability.

3.5. Gaps in Market that Heritage Positioning Could Address

A discernible gap exists in the market for a premium, yet simpler, adventure motorcycle that effectively evokes nostalgia without compromising on modern capability. The reception of the R 1300 GS, despite its technological advancements, has been marked by "controversial styling" and a less enthusiastic market acceptance than anticipated.⁹ This creates an opening for an alternative within BMW's own lineup, catering to a segment of riders who may not be fully aligned with the R 1300 GS's modern aesthetic or its sheer scale.

The "neo-retro" trend is a strong and growing force in the motorcycle industry, appealing to both nostalgic riders and a younger demographic seeking to express their personality through classic aesthetics combined with modern technology.³⁷ 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.

The R 1300 GS, while technologically advanced, faces "controversial styling" and potentially lower-than-expected popularity.⁹ This indicates that not all premium adventure bike buyers desire the absolute bleeding edge of technology or the most imposing presence. The R 12 G/S, explicitly designed as a "simpler, stripped down feel-good bike" 26 and an "alternative to the behemoth of the R1300GS" 10, directly addresses this emerging "anti-flagship" sentiment. BMW Motorrad can strategically position the R 12 G/S to capture buyers who appreciate BMW's engineering and the

distinctive boxer engine character but seek a more focused, less overwhelming, and aesthetically classic adventure experience. This approach provides a significant differentiator, not only from the R 1300 GS but also from other high-tech, large-capacity competitors in the market.

4. Market Review

4.1. Adventure Segment Overview and Trends

The adventure motorcycle segment continues to be a primary growth driver for the global motorcycle market. This expansion is significantly fueled by the increasing popularity of adventure tourism and a rise in disposable incomes, enabling more consumers to pursue outdoor and recreational activities that involve motorcycling.⁴ The segment is characterized by a strong consumer preference for dual-sport capabilities, with a substantial 85% of owners prioritizing features such as advanced suspension, off-road tires, and high ground clearance.

5 This underscores the demand for motorcycles that are genuinely capable across diverse terrains.

Emerging trends within the segment include a noticeable rise in electric adventure motorcycles, indicating a growing interest in sustainable and eco-friendly options.⁵ Concurrently, there is an increasing focus on lightweight designs, as riders seek more manageable machines, especially given the perceived difficulty in handling heavier models.

5 A significant trend observed is a shift towards "sensible and more affordable" mid-capacity motorcycles (500-1000cc), which is beginning to impact the sales of larger, more expensive models.⁹ This suggests that the adventure segment is not monolithic but is diversifying, with different sub-segments emerging, each with distinct needs and preferences. BMW Motorrad should recognize this diversification and tailor its strategy accordingly. The R 12 G/S, therefore, needs to clearly target a specific sub-segment, likely the premium mid-to-large capacity segment that values

heritage and authentic capability over sheer size or hyper-advanced features.

4.2. BMW Motorrad Positioning vs. Competitors

BMW Motorrad holds a strong and established brand reputation within the Romanian market. This is evidenced by the consistent presence of BMW models in motorcycle rental fleets, where the F 850 GS is noted as a "favorite among adventure riders".⁶ Furthermore, BMW's registration figures, with 95 units sold in January-February 2025, highlight its solid standing among leading brands.² The traditional GS series has long been synonymous with adventure touring, setting a high benchmark for comfort, power, and durability in the segment.⁶

However, the introduction of the R 1300 GS has presented a nuanced challenge. While technically superior to its predecessor, its styling has been described as "controversial," and its market reception has not been as universally enthusiastic as anticipated.⁹ This indicates that even a strong brand reputation does not guarantee universal acceptance for new designs, particularly if they represent a significant departure from established aesthetic expectations or price points.

BMW Motorrad's strong brand equity in Romania, particularly in the adventure segment ⁶, is a significant asset. However, the reception of the R 1300 GS ⁹ suggests that even with robust brand equity, new designs that deviate significantly from established aesthetic expectations or price points may not be universally embraced. The R 12 G/S, with its explicit return to classic R 80 G/S styling ²⁶, can strategically leverage BMW's strong heritage appeal. This allows it to re-engage a segment of riders who may have been alienated by the R 1300 GS's modern aesthetic. This positions the R 12 G/S as a complementary, rather than directly competitive, offering to the R 1300 GS within the BMW portfolio, effectively broadening the brand's appeal within the adventure segment.

4.3. Consumer Behavior Patterns and Preferences

Romanian riders exhibit highly engaged and active participation in motorcycle culture. This is clearly demonstrated by the significant attendance at events such as Expo

Moto Bucharest, which attracted over 19,000 visitors in March 2025.¹⁵ Local online forums, like Motociclism.ro, also serve as vibrant hubs for discussion and community interaction.

11 This high level of engagement indicates a passionate and well-connected riding community.

There is substantial interest in motorcycle tours and off-road adventures within Romania, with riders actively utilizing the country's scenic routes, such as Transfagarasan and Transalpina, and embracing its challenging terrain for experiential riding.⁷ Direct quotes from riders about "enjoying Romanian serpentine roads and nature"

6 and describing trips as a "wild, wonderful dream" 55 underscore that Romanian riders are not merely purchasing motorcycles but are investing in the experiences they enable. The high attendance at Expo Moto also highlights that consumers value direct interaction with brands and opportunities to see new product showcases firsthand.¹⁵ This suggests a desire for tangible engagement beyond digital platforms.

The prevalence of motorcycle tours, rallies, and the enthusiasm for events like Expo Moto¹⁵ strongly suggest that Romanian riders are not just buying bikes, but are deeply invested in the experiences these bikes facilitate. The direct comments about enjoying Romania's natural beauty and the transformative nature of these trips reinforce this observation. BMW Motorrad should therefore integrate experiential marketing into the R 12 G/S launch. This could involve organizing test ride events on Romania's iconic scenic roads, forging partnerships with local tour operators, and creating compelling content that showcases the R 12 G/S in authentic Romanian adventure settings. Such initiatives would resonate deeply with the experiential demands of the market.

4.4. Market Challenges and Opportunities

The Romanian adventure motorcycle market presents a dual landscape of challenges and opportunities that BMW Motorrad must navigate.

Challenges:

- **High Cost of Premium Adventure Motorcycles:** A significant barrier for potential buyers is the high price point of premium adventure models, which over 65% of consumers find too expensive.⁵

- **Difficulty Handling Heavy Models:** Many adventure riders report challenges in handling heavy motorcycles, leading to a preference for lighter alternatives.⁵
- **Competition from Capable and Affordable Mid-Capacity Bikes:** The market is seeing increased competition from mid-capacity models that offer strong features and performance at a more accessible price point, such as the CF Moto 450 MT.⁹
- **Economic Factors:** Broader economic conditions, including inflation and financing constraints, can impact the purchasing power of potential buyers.⁵

Opportunities:

- **Growing Overall Motorcycle Market:** The consistent growth in new motorcycle registrations in Romania indicates an expanding consumer base.¹
- **Strong and Sustained Interest in Adventure Tourism:** There is a deep and enduring interest in adventure tourism and off-road riding, driven by Romania's diverse landscapes and a culture of exploration.⁴
- **Emerging "Neo-Retro" Trend:** The rise of "neo-retro" styling aligns perfectly with the R 12 G/S's design, offering a unique aesthetic appeal that blends classic looks with modern technology.³⁷
- **Demand for Lighter, More Manageable Adventure Bikes:** The market's shift towards more agile and less imposing machines creates a favorable environment for models that address weight concerns.⁵
- **Interest in Electric Models:** While a longer-term opportunity for the segment, the growing interest in electric motorcycles could shape future product development.⁵

The R 12 G/S, weighing 229kg wet ²⁶ and featuring a 1170cc engine ⁴⁸, is notably lighter and more compact than the R 1300 GS (237kg, 1300cc).³¹ This positioning directly addresses the consumer concern regarding "difficulty handling heavy models"

⁵ and aligns with the preference for "lighter, more manageable machines".⁹ Furthermore, its heritage styling directly taps into the burgeoning "neo-retro" trend.³⁷ The R 12 G/S is therefore well-positioned to hit a "sweet spot" in the market. It offers BMW's premium quality and distinctive boxer engine character in a more approachable, heritage-inspired, and relatively lighter package than its larger sibling, potentially attracting riders who find the R 1300 GS too imposing or overly modern.

4.5. Heritage Styling Appetite in Adventure Segment

As extensively detailed in section 2.4, there is compelling evidence of a robust appetite for heritage and neo-retro styling within the broader motorcycle market, a trend that extends significantly into the adventure segment. This preference is driven by a combination of nostalgia, a desire for unique character, and a profound connection to motorcycling roots.³⁵ Riders are increasingly seeking motorcycles that not only perform well but also tell a story and reflect a certain timeless aesthetic.

The R 12 G/S's direct inspiration from the iconic R 80 G/S is a major asset in this context.²⁶ This direct lineage allows BMW Motorrad to tap into a rich history of adventure motorcycling, offering a product that feels both familiar and contemporary. The appeal of neo-retro design extends beyond mere nostalgia; it is also about "expressing personality"

37 and appreciating "honest craftsmanship combined with modern artistry".³⁵ This suggests that heritage styling serves as a statement of identity for riders who value authenticity and a more classic approach to motorcycling, distinguishing themselves from the overtly futuristic designs prevalent in some parts of the market.

BMW Motorrad should market the R 12 G/S as more than just a retro bike; it is a statement piece that embodies a particular philosophy of adventure riding. This philosophy values connection to the past, emphasizes craftsmanship, and promises a focused, engaging riding experience. This narrative can resonate deeply with a segment of the market that seeks more than just performance numbers, instead prioritizing a motorcycle that offers a rich character and a sense of timeless adventure.

5. Key Consumer Priorities & Attribute Prioritization (WRI Preparation)

The identification of top consumer attributes is based on explicit mentions of desired features, positive commentary, and areas of concern or improvement noted for competitor models within the provided research. Prioritization is determined by the

frequency and intensity of discussion surrounding these attributes.

Identification of Top 20 Attributes Valued by Consumers:

1. **Off-Road Capability:** This encompasses advanced suspension, high ground clearance, off-road tires, and the use of 21/18-inch wheel combinations, along with long suspension travel.⁵
2. **Comfort & Ergonomics:** Key aspects include seat comfort, overall riding position, effective wind protection, and the ability to sustain comfort over long distances.⁶
3. **Engine Performance & Character:** Consumers value tractable power, smooth acceleration, engine elasticity, strong torque delivery, and a distinctive engine sound or feel.¹⁷
4. **Technology & Rider Aids:** This includes smart ride modes, traction control, connectivity features, ABS, electronic or adaptive suspension systems, cruise control, TFT displays, and intuitive controls.⁵
5. **Reliability & Durability:** Fundamental for adventure riding, this refers to long-term dependability and low maintenance intervals.⁶
6. **Value & Pricing:** This involves the overall affordability of the motorcycle, its perceived value for money, and the cost of ownership.⁵
7. **Design & Aesthetic Appeal:** The overall visual appeal of the motorcycle, its character, the integration of heritage styling, and modern design touches are highly valued.¹⁰
8. **Weight & Maneuverability:** The desire for lighter alternatives and ease of handling at low speeds, along with overall agility, is a growing concern.⁵
9. **Fuel Capacity & Range:** The ability to cover long distances without frequent refueling is crucial for adventure touring.¹⁹
10. **Wind Protection:** Effective windscreen design for comfortable touring is important.¹⁹
11. **Luggage Options/Capacity:** The ability to carry sufficient gear for touring and adventure is a practical necessity.¹⁰
12. **Build Quality & Finish:** The perceived quality of components and overall assembly contributes to a premium feel and durability.¹⁷
13. **Passenger Comfort:** The suitability of the motorcycle for two-up riding is a consideration for many buyers.¹⁷
14. **Braking Performance:** This includes stopping power, brake feel, and the effectiveness of ABS.¹⁷

15. **Suspension Adjustability:** The ability to tune the suspension for different terrains, loads, or riding styles is highly valued.¹⁷
16. **Lighting (LED):** Modern LED lighting contributes to both visibility and aesthetic appeal.²¹
17. **Connectivity (Smartphone Integration):** Features like GPS, music, and call integration via the TFT display enhance the riding experience.¹⁷
18. **Steering Stability/Damping:** Control and stability, particularly in off-road conditions, are important for rider confidence.²³
19. **Ground Clearance:** Crucial for navigating off-road obstacles and uneven terrain.⁵
20. **Dealer Support & Warranty:** Trust in the brand's dealer network and comprehensive warranty coverage provide peace of mind.²¹

Recommendation for Attribute Prioritization:

Top Tier (Critical for Success):

1. **Off-Road Capability:** This is consistently highlighted as a core expectation for adventure bikes and a key differentiator, especially given Romania's varied terrain. A motorcycle's ability to confidently handle unpaved roads and trails is paramount for this segment.
2. **Comfort & Ergonomics:** Essential for long adventure rides and daily usability, directly impacting rider satisfaction and the ability to enjoy extended journeys. This includes both seated and standing ergonomics.
3. **Engine Performance & Character:** A powerful yet tractable engine is crucial for both on-road confidence and off-road control. The unique character of the engine, such as the boxer twin throb, adds significantly to the overall appeal and riding experience.
4. **Reliability & Durability:** Fundamental for adventure riding, where breakdowns in remote areas can be critical. The long-term dependability of the motorcycle is a non-negotiable for serious adventure riders.
5. **Design & Aesthetic Appeal (Heritage Focus):** For the R 12 G/S specifically, this attribute is paramount. The "neo-retro" trend and the explicit R 80 G/S inspiration must be a central pillar of its identity and marketing, as it directly taps into a strong market desire for authentic, characterful machines.

Second Tier (Highly Important, Differentiators):

6. Technology & Rider Aids: While expected in modern adventure bikes, the intuitive and purposeful implementation of technology is key. Features that genuinely enhance safety and control without over-complicating the riding experience are preferred.

7. Value & Pricing: Although positioned as a premium product, the R 12 G/S needs to demonstrate superior value relative to its price point, especially when compared to the R 1300 GS. This involves justifying its cost through its unique blend of heritage, capability, and quality.

8. Weight & Maneuverability: A growing concern for riders, particularly as adventure bikes become larger. The R 12 G/S's relative lightness compared to the R 1300 GS is a significant advantage that should be highlighted, appealing to those seeking a more manageable machine.

9. Suspension Adjustability: This directly supports off-road capability and allows riders to customize their experience for different terrains and loads, enhancing both performance and comfort.

Third Tier (Important, Expected):

10. Fuel Capacity & Range

11. Wind Protection

12. Braking Performance

13. Build Quality & Finish

14. Dealer Support & Warranty

15. Connectivity (Smartphone Integration)

16. Ground Clearance

17. Luggage Options/Capacity

18. Passenger Comfort

19. Lighting (LED)

20. Steering Stability/Damping

While general adventure motorcycle attributes are universally important, the R 12 G/S's specific positioning as a heritage-inspired alternative to the R 1300 GS means its *Design & Aesthetic Appeal* elevates to a top-tier priority. Its slightly lighter weight and simpler, focused technology compared to the R 1300 GS¹⁰ become key differentiators that align with emerging consumer preferences for more manageable bikes.⁵ BMW Motorrad should therefore prioritize marketing messages that highlight the R 12 G/S's authentic heritage design, its genuine off-road capability (emphasizing its 21-inch front wheel and long travel suspension), its characterful boxer engine, and its relative agility and purposeful simplicity compared to the R 1300 GS. This strategic focus will leverage its core strengths and effectively address identified market opportunities.

6. Conclusion & Strategic Implications for BMW Motorrad

6.1. Synthesis of Key Findings

The analysis of the Romanian adventure motorcycle market from January to March 2025 reveals a dynamic and growing segment, characterized by strong consumer interest in multi-terrain exploration and experiential riding. While established flagship models from competitors like Yamaha, Honda, and KTM continue to dominate market discourse, there is a clear and emerging segment of consumers who value heritage styling, lighter weight, and a more "sensible" approach to adventure motorcycling. Consumer expectations are consistently high across critical attributes such as off-road performance, overall comfort, integrated technology, and long-term reliability. The BMW R 12 G/S, with its design explicitly inspired by the iconic R 80 G/S, is uniquely positioned to tap into the burgeoning "neo-retro" trend and offer a distinct, compelling alternative within BMW's own product portfolio.

6.2. Actionable Recommendations for the R 12 G/S Launch Strategy

To maximize the impact of the R 12 G/S launch in Romania and effectively leverage its unique positioning, the following actionable recommendations are proposed:

- **Emphasize Authentic Heritage & Capability:** The R 12 G/S should be positioned as a modern interpretation of BMW's legendary adventure heritage, with a strong focus on its genuine off-road features. This includes highlighting its 21-inch front wheel and long travel suspension, ensuring that its capabilities are perceived as functional rather than merely aesthetic cues.²⁶ The popularity of the "Long Way Home" series, which celebrates classic adventure motorcycling and experiential journeys, can be leveraged to connect with this narrative of authentic, classic adventure.³⁹
- **Target the "Anti-Flagship" Segment:** A clear differentiation strategy from the R 1300 GS is essential. The R 12 G/S should be marketed as the more focused, agile, and characterful choice for riders who appreciate the distinctive boxer engine but desire a simpler, more classic, and less imposing adventure bike.¹⁰ This approach allows BMW to capture a segment of the market that may find the R 1300 GS overly complex or physically large.
- **Highlight Value Proposition:** While positioned as a premium motorcycle, the R 12

G/S's value should be clearly communicated. This involves focusing on its robust feature set, BMW's renowned build quality, and the unique blend of heritage and modern performance it offers at its specific price point, especially when compared to its larger sibling.²⁶

- **Engage with Local Community & Events:** Capitalize on the active and enthusiastic Romanian motorcycle community. Prominent participation in key events like Expo Moto Bucharest is crucial, offering opportunities for hands-on experience through test rides.¹⁵ Creating opportunities for riders to experience the R 12 G/S firsthand on local terrain will build direct connection and generate positive word-of-mouth.
- **Develop a Localized Content Strategy:** Create compelling, localized content, including YouTube vlogs and forum engagement, showcasing the R 12 G/S navigating Romania's iconic adventure routes.¹¹ This content should emphasize the motorcycle's "feel-good" and "manageable" nature across diverse riding conditions, reinforcing its suitability for the Romanian landscape and rider preferences.

6.3. Recommendations for Leveraging Heritage Positioning Effectively

To effectively leverage the R 12 G/S's heritage positioning and maximize its appeal to the target audience, the following strategies are recommended:

- **Storytelling:** Develop and disseminate compelling narratives that weave together the R 80 G/S legacy with the R 12 G/S. Share stories of BMW's pioneering spirit in adventure motorcycling, including past Dakar victories and the experiences of early GS riders. This creates an emotional connection and reinforces the R 12 G/S's authentic lineage.
- **Visuals:** Utilize powerful visual assets that evoke nostalgia while simultaneously showcasing the R 12 G/S's modern capabilities. Photography and video content should capture the essence of classic adventure with a contemporary twist, emphasizing the bike's design cues and its performance in diverse settings.
- **Community Building:** Actively foster a dedicated community around the R 12 G/S that celebrates its heritage. This could involve organizing curated rides that retrace classic adventure routes in Romania or hosting events focused on the rich history of BMW adventure motorcycles, encouraging shared experiences and brand loyalty.
- **Accessories:** Develop and promote a range of accessories that enhance both the

heritage aesthetic and the practical adventure capabilities of the R 12 G/S. This allows riders to personalize their motorcycle to their specific vision of adventure, whether it's for more rugged off-road excursions or extended touring, while maintaining the classic look.

Works Cited

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<https://www.rideadv.com/ride-adventures-tour-and-rentals-blog/best-adventure-bikes#> BMW Motorrad Social Listening & Market Analysis: Romanian Adventure Motorcycle Segment (January-March 2025)

Executive Summary

This report provides a comprehensive analysis of the Romanian Adventure Motorcycle segment from January to March 2025, prior to the launch of the BMW R 12 G/S. The objective is to establish a market intelligence baseline, assessing consumer conversations, competitive positioning, and market resonance. This intelligence is critical for validating social intelligence methodologies and informing future heritage positioning strategies for the R 12 G/S.

The Romanian motorcycle market demonstrated consistent growth in early 2025, indicating a receptive environment for new models. The adventure segment, in particular, is expanding, driven by a strong consumer desire for outdoor activities and multi-terrain exploration. Key competitors, including Yamaha, Honda, and KTM, hold significant discussion share, with a notable emergence of value-oriented brands like CF Moto. Consumer conversations prominently feature off-road performance, comfort, and technology, alongside a growing appreciation for heritage styling and lighter, more manageable adventure bikes.

The market analysis reveals a distinct opportunity for the BMW R 12 G/S. Positioned as a heritage-inspired alternative to the larger R 1300 GS, its design, which explicitly draws from the legendary R 80 G/S, aligns perfectly with the burgeoning "neo-retro" trend. This allows the R 12 G/S to appeal to a segment of riders seeking authenticity

and a more focused, less imposing adventure experience. Strategic recommendations for BMW Motorrad include emphasizing the R 12 G/S's authentic heritage and off-road capability, targeting the "anti-flagship" segment, highlighting its value proposition, and engaging actively with the local riding community through experiential marketing.

1. Introduction & Market Context

1.1. Overview of the Romanian Motorcycle Market (Jan-Mar 2025)

The Romanian motorcycle market exhibited a clear upward trajectory in the first quarter of 2025. In January, a total of 577 new motorcycles and ATV vehicles were registered, a figure that significantly increased to 1156 units in February, culminating in a cumulative total of 1733 units for the January-February period.¹ While specific March registration data is not explicitly detailed, the cumulative figure for the calendar year 2025 (CY 2025) up to April reached 3818 units, which strongly suggests continued market activity and growth through March.

3 This consistent increase in registrations indicates a robust and expanding market, suggesting a favorable environment for the introduction of new motorcycle models.

An examination of leading brands in overall registrations for January-February 2025 reveals a diverse competitive landscape. Smart Balance led with 567 units in February, contributing to a cumulative 577 units for CY 2025. CF Moto followed with 210 units in February, reaching a cumulative 425 units for CY 2025. BMW Motorrad registered 46 units in February, totaling 95 units for CY 2025, closely trailed by Yamaha with 37 units in February, reaching a cumulative 93 units for CY 2025, and Honda with 48 units in February, totaling 75 units for CY 2025.² BMW's existing presence within the top registered brands signifies a foundational market acceptance and brand recognition, providing a solid platform from which to launch new offerings like the R 12 G/S. The overall market expansion indicates a broad consumer base with a growing appetite for new vehicles, which directly benefits segments experiencing high interest, such as adventure motorcycles.

1.2. Specific Focus on the Adventure Motorcycle Segment

The adventure touring motorcycle market is experiencing substantial global growth, a trend largely attributable to the increasing demand for outdoor and sporting activities, coupled with improved standards of living and rising disposable incomes.⁴ This global phenomenon is demonstrably mirrored in Romania, a country renowned for its diverse and challenging landscapes, including iconic routes like Transfagarasan and Transalpina, which are highly appealing for adventure riding.⁶ The natural alignment between Romania's geography and the core appeal of adventure motorcycles creates a fertile ground for segment expansion.

Adventure motorcycles are increasingly becoming the preferred choice for multi-terrain exploration, with over 80% of riders identifying them as their primary option for such activities.⁵ The off-road adventure segment commands a dominant 70% market share globally, underscoring a strong consumer preference for genuine off-road capability within this category.⁵ This emphasis on authentic off-road performance means that motorcycles designed for diverse terrains are likely to resonate well with the target audience. The broader economic context of increasing disposable income further supports consumer investment in premium adventure models, as riders are more capable of affording motorcycles that facilitate their adventurous pursuits.

However, a nuanced understanding of market dynamics reveals a potential shift in consumer preferences within the adventure segment. While overall growth is strong, some market observations suggest a growing inclination towards "sensible and more affordable" motorcycles in 2025.⁹ This trend has reportedly impacted the post-launch performance of some larger adventure models, such as the R 1300 GS, which despite its advancements, has not proven as universally popular as anticipated.⁹ This market evolution suggests that while the adventure segment as a whole is expanding, consumer choices within it may be gravitating towards mid-capacity or more value-oriented options. The R 12 G/S, positioned as a heritage-inspired alternative to the larger GS, could capitalize on this trend if its pricing and perceived value align with this "sensible" shift. Its design, offering a blend of classic appeal and modern capability without the perceived "behemoth" characteristics of the R 1300 GS, positions it advantageously to attract riders who appreciate BMW's engineering but seek a more approachable and characterful experience.¹⁰

2. Social Listening Analysis: Consumer Voice & Trends

The percentages presented in this section are estimates derived from the frequency and prominence of mentions and discussions within the provided research data for the January-March 2025 timeframe. They reflect the share of discussion within this specific dataset, not necessarily actual market share or comprehensive social media volume.

2.1. Conversation Volume & Share of Voice (SOV)

Overall discussion volume surrounding adventure motorcycles in Romania during Q1 2025 appeared moderate, reflecting an active but not overwhelmingly saturated online discourse. Conversations were observed across various platforms, including local forums like Motociclism.ro ¹¹, YouTube channels such as "Long Way Home" and "motoRoute ro" ¹², and news articles covering industry events like Expo Moto Bucharest. ¹⁵ This distribution indicates that Romanian riders engage in diverse online spaces to discuss adventure motorcycling.

The estimated distribution of discussion share among key competitors in the adventure segment during this period is presented below:

Table 2.1.1: Estimated Adventure Segment Share of Voice (Jan-Mar 2025)

Competitor Model	Estimated SOV
KTM 890 Adventure R	15.0%
Yamaha Ténéré 700	18.0%
Honda Africa Twin	17.0%
Triumph Tiger 900	10.0%
BMW GS Series (traditional)	12.0%

Ducati DesertX	13.0%
Other Adventure Bikes	15.0%
Total	100.0%

The distribution of discussion share reveals that Yamaha Ténéré 700 and Honda Africa Twin commanded a slightly higher proportion of conversations within the available data, indicating their strong presence in rider discourse.¹⁷ These models are closely followed by KTM, Ducati, and traditional BMW GS series motorcycles. A significant portion of the discussion, approximately 15%, was allocated to "Other Adventure Bikes," notably including the CF Moto 450 MT.

21 This indicates the growing influence of emerging players and a rising interest in mid-capacity or value-oriented options. For BMW Motorrad, understanding the specific attributes driving conversations around Yamaha and Honda is essential for effectively positioning the R 12 G/S. The substantial discussion around "Other" brands, particularly CF Moto, highlights the competitive pressure originating from the value-oriented and mid-range segments, suggesting a need for clear differentiation in the market.

2.2. Discussion Theme Analysis

Conversations within the Romanian adventure motorcycle segment during Q1 2025 revolved around several key themes, reflecting consumer priorities and areas of interest. The estimated distribution of these discussion themes is as follows:

Table 2.2.1: Estimated Adventure Segment Discussion Themes (Jan-Mar 2025)

Discussion Theme	Estimated % of Discussions
Off-Road Performance	25.0%
Comfort & Ergonomics	20.0%
Technology & Features	20.0%
Reliability Concerns	10.0%

Value & Pricing	10.0%
Design & Character Appeal	10.0%
Any other key themes	5.0%
Total	100.0%

Off-Road Performance (25.0%): This theme consistently emerged as a primary focus. Riders frequently discussed the capabilities of models like the KTM 890 Adventure R, noting its "pin-sharp offroad handling" and "serious travel capabilities".²² The Yamaha Ténéré 700 was described as a "confidence-inspiring beast" off-road ¹⁷, while the Ducati DesertX was praised for riding "like a big dirt bike".²³ The CF Moto 450 MT garnered attention for its "IMPECCABLE" standing riding position and its 21/18-inch wheels and long travel suspension, which are considered crucial for true adventure riding.²¹ The upcoming BMW R 12 G/S itself was noted for its 21/18 wheels and long travel suspension, suggesting strong off-road potential.¹⁰ This strong emphasis on off-road capability aligns with broader consumer preferences for advanced suspension, off-road tires, and high ground clearance.⁵

Comfort & Ergonomics (20.0%): Discussions frequently highlighted the importance of rider comfort, particularly for long journeys. The KTM 890 Adventure R was recognized for its "all-day comfort" ²², and the Yamaha Ténéré 700 received updates aimed at "rider comfort and weight distribution".¹⁷ The Honda Africa Twin, especially with its DCT, was described as "Super comfortable" for city and on-road riding.²⁰ The Triumph Tiger 900 was deemed "practical" and "comfortable" for distances.²⁴ While the BMW F 850 GS was praised for its "comfort"

⁶, some discussions about the CF Moto 450 MT noted its stock seat was "uncomfortable for knees" for taller riders, though its standing position was "IMPECCABLE".²¹ The R 12 G/S, however, was noted for its "hard seat and lack of wind protection," suggesting it might not be the best for long-distance cruising.²⁶

Technology & Features (20.0%): Modern adventure bikes are expected to be equipped with advanced technology. The Yamaha Ténéré 700 was highlighted for having "More technology than previous generations".¹⁷ The Honda Africa Twin's DCT, IMU, and electronic suspension were frequently discussed.¹⁹ KTM models were noted for their "rider aids," "6D Inertial Measurement Unit," and "Cornering ABS".

²⁹ The Ducati DesertX boasts "6 riding modes" and a "TFT display".³⁰ The CF Moto 450 MT impressed with its "Dedicated ABS Off and Traction Control Off Buttons,"

Bluetooth connectivity, and screen mirroring capabilities.²¹

Reliability Concerns (10.0%): Reliability is a critical factor for adventure riders. The Ducati DesertX's Testastretta motor was described as "very well tested" and the bike itself as "even more reliable".²³ Conversely, a general perception of reliability concerns was noted for KTM 31, though the brand has extended warranties on some models to address this.³² The CF Moto 450 MT's 5-year warranty was seen as a significant trust factor.²¹

Value & Pricing (10.0%): The cost of adventure motorcycles and their perceived value were recurring topics. Discussions around the Honda Africa Twin's Adventure Sports version often included its higher cost.¹⁹ The Ducati Multistrada was acknowledged for its "hefty price" ³¹, and the general "High Cost of Adventure Motorcycles" was cited as a restraint for over 65% of potential buyers.⁵ The CF Moto 450 MT was explicitly lauded as offering "much better value" compared to used bikes ²¹, reflecting a broader market trend towards "more affordable motorcycle" options.⁹

Design & Character Appeal (10.0%): Aesthetics and the unique character of a motorcycle contribute significantly to its appeal. The Yamaha Ténéré 700 was noted for "looks the part" ¹⁷, and the Triumph Tiger 900 was described as "looks really smart".²⁴ The BMW R 12 G/S's "classic enduro design inspired by the legendary BMW R 80 G/S" and its "iconic BMW motorsport colours, spoked wheels, knobby tyres and near-identical silhouette" were central to its discussion.²⁶ The Ducati DesertX was even credited with having the "highest all-around sex appeal in the ADV segment".

³⁴ Harley-Davidson's CVO Road Glide ST successfully combined "heritage and innovation" in its design.³⁵

Any other key themes (5.0%): Other discussions included specific attributes such as weight, luggage capacity, and engine sound. The Ducati DesertX was noted as "Bit heavy for a 'middleweight'" ³⁴, and the Honda Africa Twin's DCT added about 25 pounds to the bike.²⁷ The Triumph Tiger's "triple engine sounded so much better" was a point of positive commentary.²⁵ The CF Moto 450 MT's weight was considered "challenging for beginners" in slow off-road conditions.²¹ The R 12 G/S's "lack of wind protection" was mentioned as a potential drawback for long distances.²⁶

The thematic breakdown clearly highlights that off-road performance, comfort/ergonomics, and technology/features are the most frequently discussed aspects by consumers. This aligns with global consumer preferences that prioritize advanced suspension, off-road tires, and high ground clearance.⁵ Reliability, value,

and design also feature prominently, indicating a well-rounded set of expectations from adventure riders. The R 12 G/S launch strategy should therefore prominently feature its off-road capabilities (long travel suspension, 21-inch front wheel), comfort for varied riding, and integrated technology. Highlighting reliability and perceived value will also be critical.

A closer examination of "Off-Road Performance" and "Comfort" reveals important nuances. While off-road capability is a top theme, some discussions, particularly concerning the R 12 G/S 10 and DesertX 23, express skepticism about whether owners truly take heavy, expensive bikes into extreme off-road conditions, or note that a bike might not be "optimized" for such use. Similarly, while comfort is desired, some models, including the R 12 G/S 26, are noted for having a "hard seat and lack of wind protection," making them less ideal for extensive long-distance touring. This suggests that BMW should clearly articulate the type of off-road capability the R 12 G/S offers (e.g., capable for light to moderate trails, rather than hardcore enduro if that is not its primary strength). For comfort, it would be prudent to acknowledge its design intent as a "stripped-down feel-good bike" rather than overstating its long-distance touring comfort, potentially offering accessories to cater to those who prioritize extended touring comfort.

2.3. Sentiment Analysis

The overall sentiment surrounding the adventure motorcycle segment in Romania during Q1 2025 was predominantly positive, reflecting a generally enthusiastic and satisfied community of riders.

Table 2.3.1: Estimated Overall Adventure Segment Sentiment (Jan-Mar 2025)

Sentiment Category	Estimated %
Positive	60.0%
Neutral	30.0%
Negative	10.0%
Total	100.0%

The high percentage of positive sentiment (60.0%) indicates a receptive market with a strong appreciation for current adventure motorcycle offerings. Examples of positive feedback include praise for KTM's "unmatched ability" 22, Yamaha Ténéré 700's "confidence-inspiring" nature 17, the Honda Africa Twin's "Super comfortable" DCT 20, and the Triumph Tiger's "practical, comfortable" attributes.²⁴ The positive experience of a rider who "fell in love with the BMW" F 850 GS 6 and the description of the R 12 G/S as a "hugely capable" machine 26 further underscore this positive outlook. The CF Moto 450 MT's engine was even described as "extraordinary" 21, and Expo Moto Bucharest received positive feedback for being "well organized".³⁶

Neutral sentiment (30.0%) primarily comprised factual descriptions of features, specifications, or direct comparisons without explicit positive or negative framing. This includes statements such as the Africa Twin Adventure Sports coming "with a bigger tank" 19 or the Ténéré 700 having "More technology than previous generations".¹⁷ The R 1300 GS was noted to have an "all new boxer twin adds 9bhp" 31 without immediate judgment on its impact.

Negative sentiment (10.0%) was relatively low and often focused on specific, addressable shortcomings rather than fundamental flaws. Criticisms included the Yamaha Ténéré 700 lacking "a little at the top end" 17, the Honda Africa Twin consuming "so much" fuel 19, and the Triumph Tiger's screen being "laggy".²⁵ The R 12 G/S was noted for its "hard seat and lack of wind protection" 26, while the Ducati DesertX had "wind noise... pretty bad".²³ The CF Moto 450 MT's "front brake lacks modulation" was also mentioned.²¹ The R 1300 GS's styling was described as "controversially styled".⁹ This predominantly positive market outlook indicates that BMW Motorrad is entering a receptive environment. The launch strategy for the R 12 G/S should focus on amplifying its strengths and proactively addressing potential minor criticisms, perhaps through accessory offerings or clear communication regarding its intended use and design philosophy.

2.4. Consumer Expectations & Heritage Interest

Consumer Expectations:

Romanian adventure riders express clear expectations for their motorcycles, largely mirroring global trends. They prioritize advanced suspension, off-road tires, and high ground clearance, indicating a strong desire for genuine multi-terrain capability.⁵ There is a demand for high endurance and stability features, particularly for extended multi-terrain exploration.⁵ A

notable trend is the growing interest in lighter alternatives, driven by the perceived difficulty in handling heavier models.⁵ Modern technology is highly valued, with riders seeking smart ride modes, traction control, connectivity, ABS, and adaptive suspension.⁵ For mid-range bikes (500-1000cc), a crucial expectation is a balanced combination of power and weight.⁵ Furthermore, there is a nascent but significant interest in long-range electric motorcycles, provided battery life exceeds 250 km per charge.⁵

Evidence from Consumer Discussions:

- "More than 85% of adventure motorcycle owners prioritize features such as advanced suspension, off-road tires, and high ground clearance." ⁵
- "More than 50% of adventure riders report difficulty in handling heavy models, leading to increased focus on lightweight alternatives." ⁵
- "Additionally, 70% of riders express interest in long-range electric motorcycles, with over 60% of adventure riders willing to switch if battery life exceeds 250 km per charge." ⁵
- A discussion about the Honda Africa Twin highlighted a preference for lighter, cheaper models with a "21/18 wheel combo," emphasizing a desire for off-road capable setups.¹⁹
- Conversely, a Triumph Tiger discussion indicated varied preferences for wheel size, with some finding a 19-inch front wheel to be the "sweet spot" for touring, contrasting with the 21-inch preference for off-road.²⁵ This suggests that while off-road capability is desired, the specific application (e.g., hardcore off-road vs. touring with occasional dirt) influences feature preference.
- The CF Moto 450 MT's engine was praised for being "extraordinary," "very civilized," "very elastic," and "full of torque across all gears and RPM ranges," highlighting a preference for smooth, tractable engine character.²¹
- The presence of "Dedicated ABS Off and Traction Control Off Buttons" on the CF Moto 450 MT was appreciated, as it offered direct control unlike other bikes that require navigating menus.²¹ This points to a desire for intuitive, easy-to-use technology controls.

Heritage Interest:

A significant trend observed for 2025 is the "Return of Neo-Retro Motorcycles," which combines classic aesthetics with modern technologies. This trend appeals to both nostalgic riders and younger individuals who see it as a way to express their personality.³⁷ The Harley-Davidson CVO Road Glide ST exemplifies this successful fusion, recognized for its "authentic design" and "deep respect for tradition" alongside "modern touches".

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The BMW R 12 G/S is explicitly designed to tap into this trend, featuring a "classic enduro design inspired by the legendary BMW R 80 G/S".³³ Its aesthetics, including

"iconic BMW motorsport colours, spoked wheels, knobby tyres and near-identical silhouette," are a direct homage to the original.²⁶ The "Long Way Home" documentary series, featuring Ewan McGregor and Charley Boorman riding vintage BMW R75/5 and Moto Guzzi bikes across Europe, further popularizes the "nostalgic" appeal of old motorcycles and the "challenge" and "fun" associated with them.³⁹ This series has played a role in bringing the concept of dual-sport and adventure bikes to a more mainstream audience.

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Evidence from Heritage Discussions:

- "If you're a fan of old BMWs, or a 1980s Dakar Rally connoisseur it's easy to see what inspired the new £14,420 R12 G/S. The iconic BMW motorsport colours, spoked wheels, knobby tyres and near-identical silhouette, all tip a hat to the '80s R80 G/S road bike..." ²⁶
- A Reddit discussion about the R 12 G/S noted, "That's a great bike they've made. Nice throwback to the R80G/S, and with 21/18 wheels and similar ground clearance and suspension travel to a T7 should be capable offroad as well".¹⁰ This highlights appreciation for the design's authenticity and its functional implications.
- Another comment on the R 12 G/S praised its "Simplicity with very stripped instrumentation, air/oil cooling, three ride modes and ABS... an alternative to the behemoth of the R1300GS that's still GS at the roots".¹⁰ This indicates an appreciation for a simpler, heritage-inspired alternative to larger, more complex modern adventure bikes.
- Ewan McGregor, discussing "Long Way Home," stated, "There's something nostalgic about riding an old bike. It's sort of perfect for what we do, to ride along at 60, 65 mph. It's a comfortable speed to be able to capture all the stuff we need to capture".³⁹ This connects heritage appeal with a relaxed, experiential riding style, emphasizing the journey itself.

The strong interest in neo-retro styling ³⁷ combined with the popularity of the "Long Way Home" series ³⁹ suggests a consumer segment that values authenticity, the journey over pure speed, and a connection to motorcycling heritage. The R 12 G/S's design, explicitly referencing the R 80 G/S

³³, directly taps into this. The critique of the R 1300 GS's popularity ⁹ and the positive reception of a "simpler" R 12 G/S ¹⁰ further support a desire for less "behemoth" and more "characterful" adventure bikes. 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. This contrasts with the increasingly complex and heavy flagship adventure bikes. Marketing efforts should lean into the narrative of "authentic adventure" and "heritage reimaged."

3. Competitive Landscape Analysis

3.1. Pre-R 12 G/S Adventure Market Structure: Leaders and Positioning

The Romanian adventure motorcycle market, prior to the R 12 G/S launch, was characterized by a diverse range of competitors, each with distinct positioning strategies:

- **KTM:** KTM maintains its position as an aggressive, off-road-focused leader, particularly with models like the 890 Adventure R. These bikes are known for their "pin-sharp offroad handling" and "serious travel capabilities".²² Their rally heritage, drawing inspiration from the Dakar-winning KTM 450 Rally, further reinforces this image of extreme off-road prowess.
32 However, a general perception of reliability concerns has been noted for KTM 31, although recent models offer extended warranties to mitigate this.³²
- **Yamaha (Ténéré 700):** The Ténéré 700 is a strong contender in the middleweight segment, lauded for its versatility, confidence-inspiring off-road capability, and a "simple" approach that avoids excessive electronics (e.g., no IMU).¹⁷ Its market success has been so significant that it has "spawned a whole family of Ténérés" and inspired numerous imitators.
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- **Honda (Africa Twin):** The Africa Twin is widely regarded as a well-rounded and reliable choice, offering a balanced blend of on-road comfort and off-road capability. Its Dual Clutch Transmission (DCT) option is a significant differentiator, enhancing comfort for both city riding and on-road touring.¹⁹ The brand benefits from a reputation for "legendary reliability".
44 Some consumer discussions, however, mention higher fuel consumption compared to rivals as a point of consideration.¹⁹
- **Triumph (Tiger 900):** Triumph's Tiger 900 offers a compelling combination of

practicality, comfort, and nimble handling, making it suitable for touring.²⁴ The distinctive triple engine provides a unique character and appealing sound.²⁵ The larger Tiger 1200 Rally Pro is recognized for its high seat and off-road focus, though its weight is also a factor in discussions.⁴⁵

- **Ducati (DesertX):** The Ducati DesertX stands out as a unique, V-twin powered adventure bike, celebrated for its "drop-dead gorgeous design" and surprisingly strong off-road capability, with riders noting it "rides like a big dirt bike".²³ Its Testastretta engine is praised for its reliability and distinctive character. Common criticisms include wind noise and buffeting, and its classification as "a bit heavy for a 'middleweight'".²³
- **BMW GS Series (traditional):** The traditional BMW GS series remains the established benchmark for adventure touring, recognized for its power, comfort, and durability, as exemplified by models like the F 850 GS.⁶ The newer R 1300 GS is technically superior to its predecessor, with advanced technology and a powerful boxer engine.³¹ However, its styling has been described as "controversial," and its post-launch popularity has not met all expectations.
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- **Emerging Competitors (e.g., CF Moto):** Brands like CF Moto are rapidly gaining traction, particularly with models such as the 450 MT. These bikes offer "much better value" and a strong feature set, including adjustable suspension, tubeless spoked wheels, and dedicated ABS/TC buttons, posing a significant challenge to established players in the mid-capacity segment.²¹

Each major competitor has successfully carved out a distinct niche: KTM for hardcore off-road, Yamaha for versatile middleweight value, Honda as a reliable all-rounder with advanced technology, Triumph for refined touring and character, and Ducati as a stylish, off-road-capable exotic. Traditional BMW GS models occupy the premium touring space. The rise of CF Moto indicates a strong and growing value-for-money segment. This diverse competitive environment means the R 12 G/S cannot simply compete on all fronts. Its unique heritage positioning and focus on a "simpler" 10 yet capable boxer-twin adventure experience must be clearly articulated to differentiate it from both the flagship R 1300 GS and the established rivals.

3.2. Price Positioning Across Adventure Segment

Price remains a critical factor in the adventure motorcycle market. High-end adventure motorcycles, particularly those exceeding 1000cc, are frequently perceived

as "too expensive" by a significant portion of potential buyers, with over 65% expressing this concern.⁵ Examples of these premium price points include the Ducati Multistrada V4 Rally at approximately £23,590 ³¹, the BMW R 1300 GS at around £16,470 ³¹, and the Triumph Tiger 1200 Rally Pro priced at £18,295.⁴⁵ These figures underscore the substantial investment required for top-tier models.

In contrast, mid-capacity motorcycles (500-1000cc) are the most preferred segment, accounting for over 60% of global adventure motorcycle sales. This preference is attributed to their balanced combination of power and weight, often accompanied by more accessible pricing.⁵ The CF Moto 450 MT, for instance, is priced at 5750 euro with VAT and is considered to offer "much better value" than comparable used bikes.²¹ This segment's growth reflects a broader market shift towards more "sensible and more affordable" motorcycle options.⁹

The market data and expert commentary strongly indicate that while the demand for adventure bikes is high, there is an increasing price sensitivity, particularly within the >1000cc segment. This trend appears to be influencing purchasing decisions, driving interest towards mid-capacity and more affordable options. The perceived underperformance of the R 1300 GS in terms of market reception ⁹ could be linked to this price sensitivity. The R 12 G/S, with its expected MSRP of \$16,395 ⁴⁸, positions it as a premium offering within the mid-to-large capacity range. Its success will depend on clearly communicating its value proposition relative to both the more expensive R 1300 GS and the more affordable mid-capacity alternatives. The R 12 G/S's "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.

3.3. Feature Differentiation Strategies

Competitors in the adventure motorcycle segment employ various strategies to differentiate their models through distinct feature sets:

- **Engine Character:** Manufacturers differentiate their offerings through unique engine characteristics. KTM is known for its responsive V-twin engines, Yamaha for its tractable CP2 parallel-twin, Honda for its smooth DCT and parallel-twin power delivery, Triumph for its characterful triple engines, and Ducati for its reliable Testastretta V-twin.¹⁷

- **Suspension & Off-road Focus:** Differentiation is also achieved through suspension setups and a clear off-road bias. KTM models feature WP XPLOR suspension, drawing inspiration from Dakar rally bikes.³² The Yamaha Ténéré 700 is praised for its adjustable yet simple suspension¹⁷, while Ducati's DesertX uses Kayaba components, with a dedicated Rally version for enhanced off-road performance.³⁰
- **Technology Suites:** Advanced technology packages are a key differentiator. Honda's Africa Twin integrates a six-axis IMU, electronic suspension, and DCT.¹⁹ BMW's GS series offers adaptive vehicle height control and a comprehensive suite of advanced rider aids.⁴⁷
- **Ergonomics/Comfort:** Rider comfort is addressed through various ergonomic solutions. The Honda Africa Twin features comfort seats and enhanced wind protection.²⁷ Triumph's Tiger models offer options for lower seat heights to accommodate a wider range of riders.²⁵
- **Weight:** There is a growing focus on reducing overall motorcycle weight, with consumers expressing a preference for lighter alternatives due to the perceived difficulty in handling heavy models.⁵

While technology and features are highly valued by consumers⁵, some models, such as the Yamaha Ténéré 700¹⁷ and the R 12 G/S¹⁰, are praised for their *simplicity* or a purposeful omission of certain complex features (like an IMU on the Ténéré 700). This indicates a segment of riders who value a more direct, less electronically-intervened riding experience, particularly for off-road applications. BMW Motorrad should therefore highlight the R 12 G/S's *curated* feature set that supports its heritage and off-road focus, rather than simply listing every available technology. The emphasis should be on how its features enhance the core riding experience without introducing unnecessary complexity, which can be a significant differentiator in a market increasingly saturated with high-tech, high-cost models.

3.4. Consumer Preference Patterns

Consumer preference patterns in the Romanian adventure motorcycle market align closely with global trends, emphasizing versatility and capability. There is a strong preference for dual-sport motorcycles, which has contributed to over 60% of the total market expansion.⁵ This indicates that riders seek bikes capable of performing well across various terrains, from paved roads to unpaved trails.

A consistent priority for adventure motorcycle owners is the inclusion of advanced suspension, off-road tires, and high ground clearance.⁵ These attributes are directly linked to the practical application of adventure riding, enabling riders to confidently tackle challenging environments. The demand for genuine off-road features underscores that consumers are looking for more than just the aesthetic of an adventure bike; they seek authentic capability.

Furthermore, there is a growing interest in electric adventure bikes, reflecting a broader shift towards sustainable transportation solutions.⁵ This trend, while still emerging, suggests a future direction for the segment. Another notable pattern is the shift towards lighter, more manageable machines, particularly among older riders.⁹ This preference is driven by the desire for easier handling and reduced fatigue during rides.

The strong preference for dual-sport capabilities and the prioritization of off-road-specific features (suspension, tires, ground clearance) point to a desire for genuine capability beyond just superficial "looks." This aligns well with the R 12 G/S's design, which incorporates a 21-inch front wheel and long travel suspension²⁶, directly addressing these core consumer demands. BMW Motorrad should emphasize the R 12 G/S's authentic off-road credentials and how its design choices directly translate to superior multi-terrain performance, rather than merely being aesthetic nods to heritage. This approach will resonate with riders who value functional design and real-world capability.

3.5. Gaps in Market that Heritage Positioning Could Address

A discernible gap exists in the market for a premium, yet simpler, adventure motorcycle that effectively evokes nostalgia without compromising on modern capability. The reception of the R 1300 GS, despite its technological advancements, has been marked by "controversial styling" and a less enthusiastic market acceptance than anticipated.⁹ This creates an opening for an alternative within BMW's own lineup, catering to a segment of riders who may not be fully aligned with the R 1300 GS's modern aesthetic or its sheer scale.

The "neo-retro" trend is a strong and growing force in the motorcycle industry, appealing to both nostalgic riders and a younger demographic seeking to express their personality through classic aesthetics combined with modern technology.³⁷

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.

The R 1300 GS, while technologically advanced, faces "controversial styling" and potentially lower-than-expected popularity.⁹ This indicates that not all premium adventure bike buyers desire the absolute bleeding edge of technology or the most imposing presence. The R 12 G/S,

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