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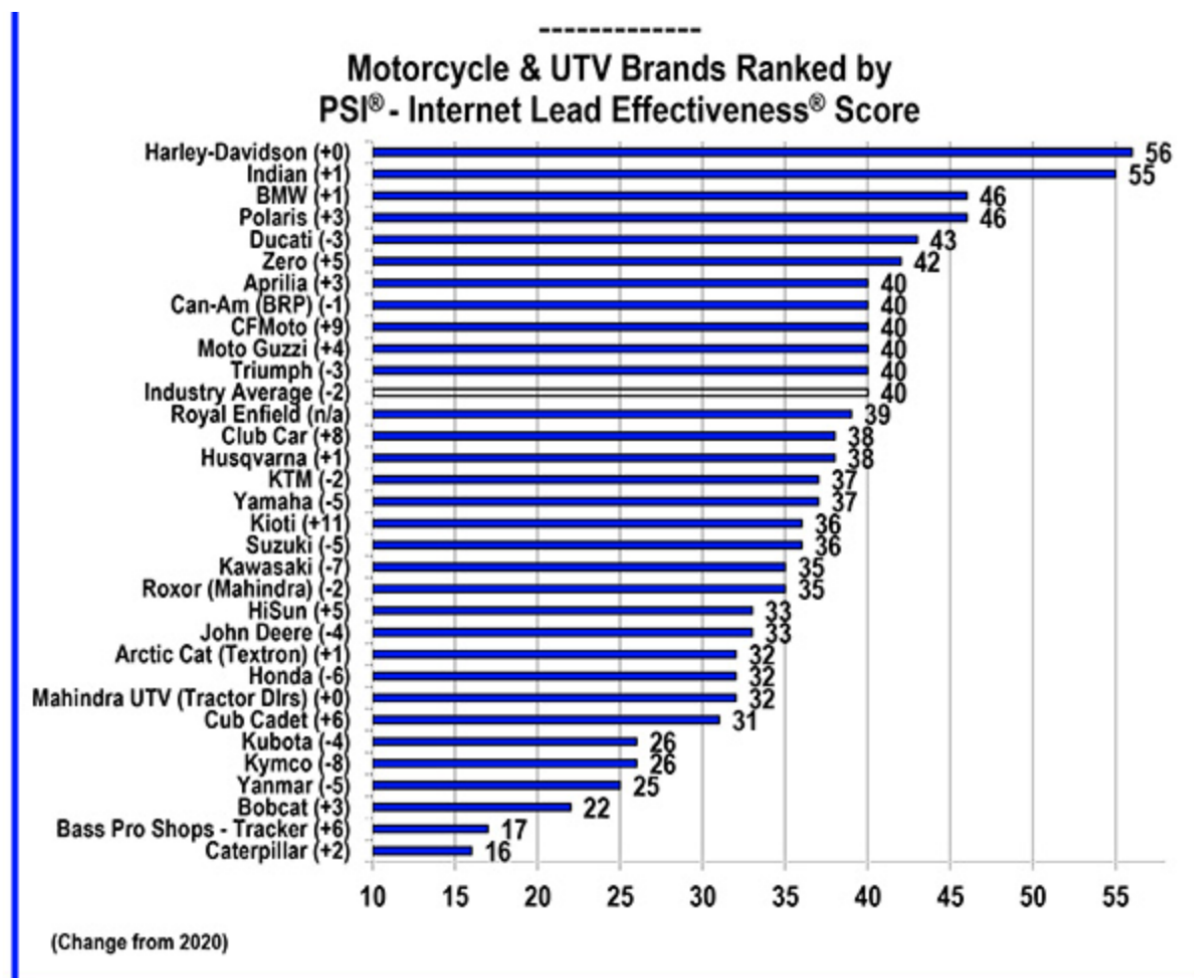
Harley-Davidson dealerships have ranked highest in the recently released 2021 Pied Piper PSI Internet Lead Effectiveness (ILE) Motorcycle/UTV Industry Study, which answers the question, "What happens when motorcycle or UTV customers visit a dealer website and inquire about a vehicle?" The Indian motorcycle brand was ranked second, followed by BMW and Polaris.

Dealers for top brands improved their website response behaviors dramatically over the past two years, while dealers for other brands failed to improve. For example, the 2021 ILE study results show that dealers selling Harley-Davidson, Indian, BMW or Polaris sent an email or text answering a website customer's question about 50% of the time on average. In 2019, the figure for the same dealers was only about 35% of the time.

In contrast, Honda, Kawasaki, Triumph or Yamaha dealers sent an email or text answering a website customer's question only about 30% of the time on average in both 2019 and 2021.

To complete the 2021 ILE study, Pied Piper submitted customer inquiries through the individual websites of 6,407 dealerships between July 2020 and March 2021, asking a question about a vehicle in inventory, and providing a customer name, email address and local telephone number. Pied Piper then evaluated how the dealerships responded by email, telephone and text message over the next 24 hours; 20 different measurements generate dealership ILE scores, which range from zero to 100 – 17% of dealerships nationwide scored above 70, requiring a quick and thorough personal response, while 44% of dealerships scored below 30, showing failure to personally respond in any way to their website customers.

Now in its 11th year, the ILE study for 2021 implemented a modification to scoring which required answering a customer's question by email or text as the only way to "stop the timeliness clock." The industry average ILE score was unchanged by the modified scoring, but the change moved average scores for individual brands by as much as five points. In general, brands whose dealers were more likely to personally respond to customers benefited from this change, in contrast to brands whose dealers relied more on auto-responses and fixed email templates.



Source: 2021 Pied Piper PSI - MC/UTV Internet Lead Effectiveness Industry Study (USA)

www.piedpiperpsi.com

The following are additional examples of performance variation by brand:

- Harley-Davidson, BMW, Indian, Polaris, Club Car, HiSun and CFMoto dealers on average sent an email or text that answered the customer's question within one hour 30% of the time or more. Kawasaki, Kubota, Honda, Caterpillar, Kymco, Bobcat, Yamaha, and Tracker dealers on average emailed or texted an answer within one hour less than 15% of the time.
- Harley-Davidson and Indian dealers on average sent a text message more than 30% of the time, while John Deere, Kioti, Kubota, Moto Guzzi, Bobcat, Cub Cadet, Hisun, Tracker, and Yanmar dealers on average texted less than 2% of the time.
- Harley-Davidson and Indian dealers on average phoned website customers within one hour more than 30% of the time, while John Deere, Kubota, Mahindra, Bobcat, Club Car, Cub Cadet, Kioti, Tracker, Moto Guzzi, HiSun, Yanmar and Arctic Cat dealers on average phoned within one hour less than 6% of the time.

Digital retail tools have become much more common on automotive dealership websites and have also started to appear on websites for dealers selling motorcycles or UTVs. As part of the 2021 ILE study, Pied Piper measured whether dealership websites for each brand featured the following digital retail tools:

- Did the website have a "buy now" or "buy from home" button?
 - Automotive dealerships: included on 25% of the websites

- Motorcycle/UTV dealerships: included on less than 1% of the websites
- Did the website offer to provide a trade-in value?
 - Automotive dealerships: included on 89% of the websites
 - Motorcycle/UTV dealerships: included on 76% of the websites
- Did the website offer chat to communicate with customers while they are still on the website?
 - Automotive dealerships: included on 72% of the websites
 - Motorcycle/UTV dealerships: included on 16% of the websites

Most dealers today understand that quickly responding to web customers is critical to sales success, but for most dealers there is still plenty of room to improve their dealership web response behaviors. The effort to improve performance is worthwhile because better dealership web response behaviors correlate highly with better web customer sales close rates. "Dealers who consistently respond to web customers by both email and phone within 60 minutes sell 50% more units on average to the same quantity of web customers than dealers who typically fail to respond within 24 hours," said Fran O'Hagan, President and CEO of Pied Piper. Pied Piper has found that the key to driving improvement in both web-response behaviors and sales is to show dealers what their web customers are really experiencing, which is often a surprise.