



INDIAN DEALERS RANKED HIGHEST IN WEBSITE RESPONSE

Powersports Industry Has Improved, But There Is A Growing Gap

Indian Motorcycle dealerships ranked highest in the 2023 Pied Piper PSI Internet Lead Effectiveness (ILE) Motorcycle/UTV Industry Study. Designed to measure responsiveness to internet leads coming through dealership websites, Pied Piper has conducted these studies since 2011. Following Indian were Harley-Davidson, Polaris RZR dealers, BRP's Can-Am dealers, Kawasaki and Yamaha.

"Powersports dealers were quicker to respond to their website customers this year than ever before," said Fran O'Hagan, CEO of Pied Piper. "On the other hand, there has become a large difference in how dealers for the top-ranked brands treat their website customers compared to dealers for brands ranked at the bottom." Overall the powersports industry has substantially improved dealer treatment of website customers. As an example, five years ago a powersports website customer's inquiry would be answered only 31% of the time on average, compared to 52% of the time in 2023.

Pied Piper submitted customer inquiries through the individual websites of 6,247 dealerships. Each inquiry asked a specific question about a vehicle in inventory, and provided 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.

Brands with the greatest improvement since last year's study were Kubota, Arctic Cat, Kawasaki and Yamaha. In fact, only four brands failed to improve from 2022 to 2023: BMW, Harley-Davidson, Triumph and Moto Guzzi. Industry average ILE performance increased five points to a score of 48, an all-time high during the eight years Pied Piper has measured and reported industry dealer web response performance. As an example of the improved performance, 17 of the 25 brands measured achieved ILE scores over 40 this year, compared to as recently as 2019, when only 3 brands scored over 40.

METHODOLOGY

Twenty different measurements generate dealership ILE scores, on a scale of 100. In a traditional bell curve of performance, 27% of all dealerships nationwide scored above 70 (providing a quick and thorough personal response), while 35% of dealerships scored below 30 (failing to personally respond to their website customers). By comparison, for the top scoring Indian Motorcycle brand, 46% of their dealers scored above 70, while only 18% scored below 30.

On average industry wide, dealerships this year were more likely to schedule an appointment, more likely to send a text message, more likely to phone quickly and more likely to provide compelling reasons for the customer to buy from this specific dealership. Despite the substantial increase in the use of texting, from 27% of the time last year to 37% of the time this year, customers were still likely to receive an answer to their question by email (41% of the time), or to receive a phone call (46% of the time.)

"The top performing dealerships reach out to a customer using multiple paths, then when the customer responds, they follow-up using the same path used by the customer," O'Hagan said.

Response to customer web inquiries varied by brand and dealership:

How often did the brand's dealerships email or text an answer to a website customer's question within 30 minutes?

- More than 35% of the time on average: Harley-Davidson
- Less than 15% of the time on average: Tracker, Kymco, Moto Guzzi

How often did the brand's dealerships use a text message to answer a website customer's inquiry?

- More than 35% of the time on average: Harley-Davidson, Indian

- Less than 5% of the time on average: Tracker, Cub Cadet, John Deere, Kubota

How often did the brand's dealerships respond by phone to a website customer's inquiry?

- More than 45% of the time on average: Harley-Davidson, Indian, Polaris, Kawasaki, Yamaha

Pied Piper Prospect Satisfaction Index® (PSI®) Motorcycle & UTV Brands Internet Lead Effectiveness® (ILE®) Scores 2019 through 2023

Brand	ILE Score						
	2023	2022	2021	2020	2019	Change 2022 to 2023	Change 2019 to 2023
Indian	61	58	55	54	36	5%	69%
Harley-Davidson	60	60	56	56	43	0%	40%
Polaris	57	51	46	43	32	12%	78%
Can-Am (BRP)	47	45	40	41	32	4%	47%
Kawasaki	47	37	35	42	35	27%	34%
Yamaha	47	38	37	42	31	24%	52%
Ducati	46	41	43	46	40	12%	15%
Husqvarna	46	42	38	37	31	10%	48%
KTM	45	40	37	39	32	13%	41%
Royal Enfield	45	44	39	N/A	N/A	2%	N/A
Suzuki	45	37	36	41	33	22%	36%
Aprilia	44	37	40	37	29	19%	52%
Triumph	44	44	40	43	33	0%	33%
Arctic Cat	43	33	32	31	32	30%	34%
Honda	43	39	32	38	33	10%	30%
BMW	41	45	46	45	40	-9%	2%
Moto Guzzi	40	40	40	36	29	0%	38%
Zero	38	36	42	37	28	6%	36%
Kubota	35	24	26	30	22	46%	59%
CFMoto	34	33	40	31	23	3%	48%
Cub Cadet	34	31	31	25	28	10%	21%
HiSun	34	31	33	28	21	10%	62%
John Deere	34	30	33	37	29	13%	17%
Kymco	27	26	26	34	25	4%	8%
Tracker (Bass Pro Shops)	15	14	17	11	N/A	7%	N/A
INDUSTRY AVERAGE	48	43	40	42	33	12%	45%
Memo: Auto Industry Avg	58	55	55	57	52	5%	12%

Source: 2019-2023 Pied Piper PSI® Internet Lead Effectiveness® Studies (USA) - Scale 0 to 100 www.piedpiperpsi.com

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- Less than 20% of the time on average: Cub Cadet, HiSun, John Deere, Kymco

How often did the brand's dealerships "Do Both Fast?" Dealer answered the customer's question by email/text and also phoned the customer, all within 60 minutes.

- More than 20% of the time on average: Harley-Davidson, Indian, Polaris
- Less than 5% of the time on average: Moto Guzzi, Cub Cadet, Kymco, Tracker, John Deere, Kubota, HiSun

The 2023 Pied Piper PSI-ILE Study (U.S.A. Motorcycle & UTV) was conducted between September 2022 and March 2023 by submitting website inquiries directly to a sample of 6,247 dealerships nationwide representing all major brands. 📄



Fran O'Hagan, Pied Piper CEO presenting the 2023 Powersports ILE Trophy to Jennifer Butters, Director, Motorcycle Sales and Channel Improvement and Karl Erbach, Manager, Channel Development

About Pied Piper

Founded in 2003, Pied Piper Management Company, LLC is a Monterey, California, company that helps brands improve the omnichannel sales & service performance of their retailers, by establishing fact-based best practices, then measuring and reporting performance. Examples of other recent Pied Piper PSI studies are the 2023 Pied Piper PSI ILE Auto Industry Study (General Motors' Cadillac brand was ranked first) and the 2023 Pied Piper PSI ILE Compact Tractor Industry Study (John Deere was ranked first). Complete Pied Piper PSI industry study results are provided to vehicle manufacturers and national dealer groups. Manufacturers, national dealer groups and individual dealerships also order PSI evaluations – in-person, internet or telephone – as tools to measure and improve the omnichannel sales and service effectiveness of their dealerships. For more information about the Pied Piper Prospect Satisfaction Index, and the fact-based PSI process, go to: www.piedpiperpsi.com



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HOW DID THE CAR DEALERS DO?

Interested in Autos too? Pied Piper conducted an industry study which measured how effectively premium auto brands and dealers helped both website and in-person car shoppers. Cadillac was ranked first of 25 brands, followed by Infiniti and Mercedes-Benz. For the first time, EV-only brands Tesla, Rivian, Lucid and Polestar were measured too; also exotics like Ferrari, Lamborghini and Rolls-Royce.

"Dealers for three powersports brands now perform as well as auto dealers for response to website Customers," notes Chris Nation, Senior Program Manager for Pied Piper. "Five years ago few powersports dealers responded effectively when customers reached out to a dealer through the dealer website. In 2023 powersports dealers for many brands still have a lot of room for improvement, but dealers selling Polaris Inc's Indian Motorcycles, dealers selling Harley-Davidson and dealers selling Polaris UTVs now handle their Internet leads as effectively as the typical auto dealer."

Go here to see the complete rankings by brand and for more information: lnkd.in/gQGDtWn 📄

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