

THE RECREATION SHOPPING EXPERIENCE

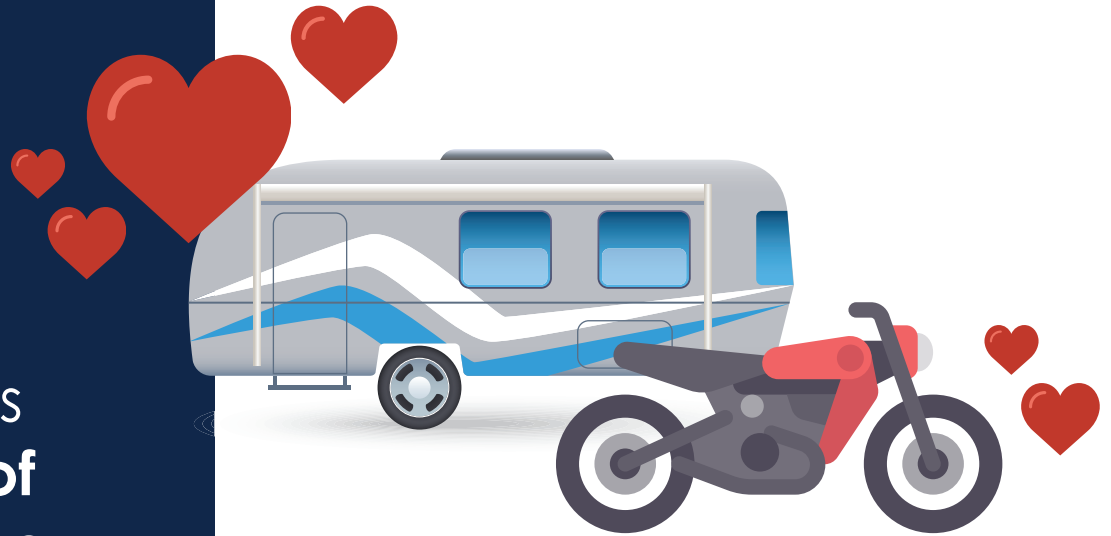
A Study By Rollick:

Why Consumers Buy and How To Ensure
They Buy From You



Whether you are a **manufacturer (OEM)** of recreation products or a **reseller (dealer) of recreation products**, you have two goals:

1. To **sell a consumer your product**, and
2. If they are happy with their original purchase, **sell that same consumer an additional product.**



As a recreational manufacturer or dealer, **your goal is to have your fair share of your consumers' garage.**

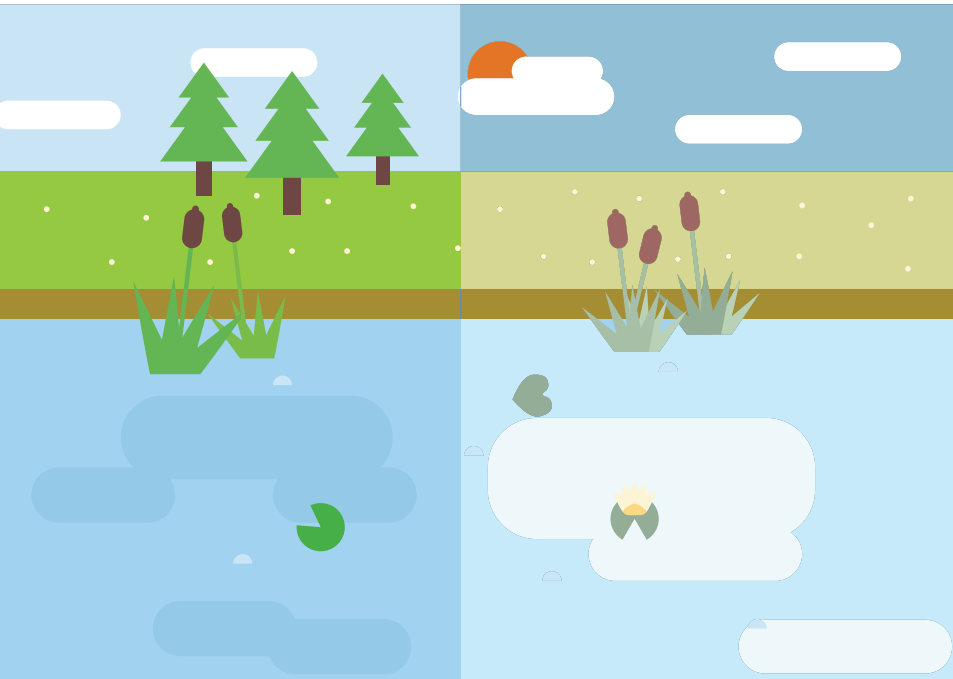
Imagine a garage full of your brand's products: a boat, an RV, a snowmobile, an ATV, a motorcycle, or different types of the same brand you may sell.





If you sell Dad or Mom an ATV, perhaps their teenager's first ATV should be an entry-level model of your product line.

Or maybe Dad likes the 600 CC motorcycle, but Mom is more comfortable with an e-bike or scooter.



Maybe in the summer, the recreation consumer is thinking about boating or fishing on a local lake, but in the fall or winter they plan to take an RV on a road trip to visit some sites on their bucket list with an ATV in the back.

It is important to think beyond the person sitting in the dealership, and consider all the possible reasons a consumer may purchase your brand so you can fill up their garage.

The recreation consumer, unlike a purchaser of an automobile or other “need” product, is buying not just the product, **they are buying into the lifestyle**. They have the recreation gene, or the outdoors gene, or the spirit of adventure gene and you need to tap into that. This type of consumer requires an integrated strategy that follows them not only during the initial purchase inquiry, but also throughout their post-purchase experience.

This strategy will serve the consumer for **a lifetime of enjoyment with your products**. This is how you fill the recreation enthusiast’s garage with your products. First, let’s look at the obstacles that may be keeping that from happening.



The data below indicates average length of time from initial inquiry to purchase for a recreation product.

19.4%
of sales took **over 360**
days to close

15.1%
of sales took **30 days** to
close

11.1%
of sales took **120 days**
to close

Recreational Buying Process: Friction Between Buyer and Seller

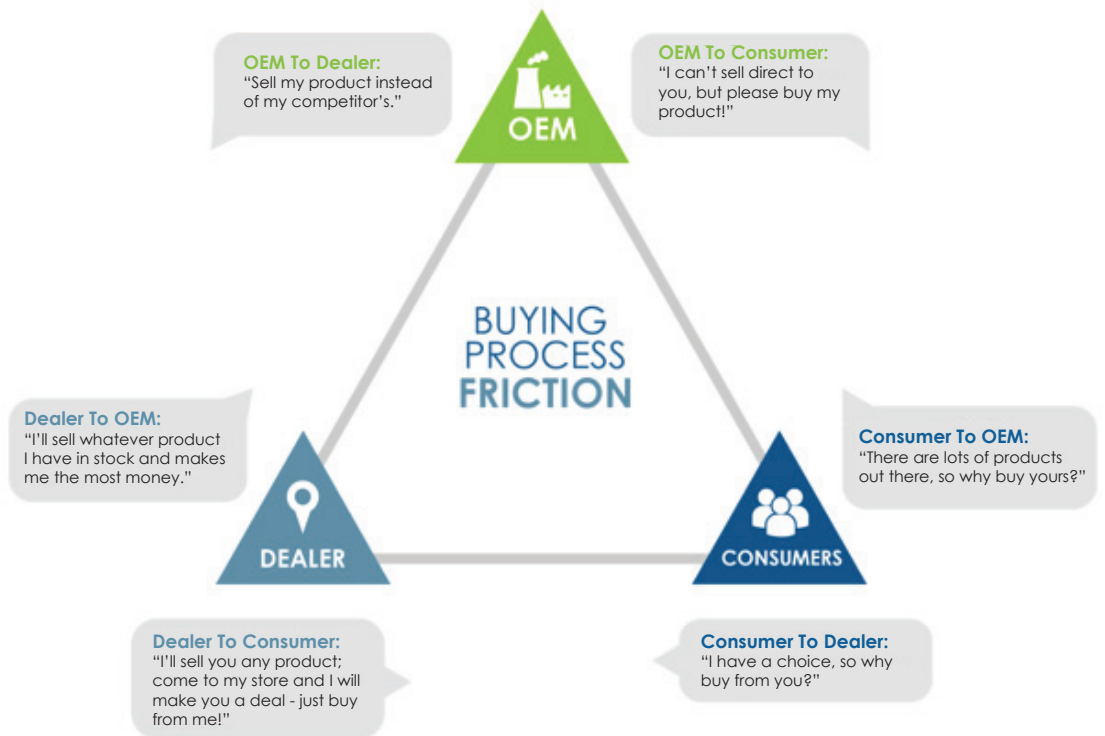
For many reasons, the recreation buyer, and the way OEMs and dealers sell to the recreation buyer, is different than the automotive buyer. The automotive space, for the most part, sells a need-based product with a short purchase horizon from inquiry to purchase. The recreational buyer, meanwhile, is a want/aspiration-based consumer and the recreation product has a much longer purchase cycle. Additionally, lifestyle changes, changing family make-up, living location, and even perhaps seasonality may impact the decision-making process and time frame.

Beyond purchase time frame, there is another major difference between the recreation buyer and the automotive buyer, and that is how the industry is set up between OEM, dealer and consumer. In the automotive industry, you have dealers that are single-brand-centric, meaning an automotive dealer only sells brands from one OEM at one dealer location. However, the recreation space is unique in that individual dealers sell multiple brands from multiple, competing OEMs. This distinction between industries causes friction between the OEM, dealer and the consumer. Now, looking at the chart on the next page, we can see that as soon as a recreation buyer enters the purchase cycle, the recreation industry is set up for conflict and friction.

Stakeholder Friction

This chart explains how all stakeholders in the recreation purchase process are, in some way, working against each other to achieve the same end goal: filling a consumers' garage with recreation products.

The conflict illustrated here represents multiple points of friction in the purchase process, which is further demonstrated in the results from Rollick's Lapsed Buyer Study. In looking at the buying process friction image, while everyone has a vested interest in the end goal of a recreation product in a consumers' garage, the journey is fraught with conflict.



The Buying Process Friction

The OEM's goal is to convince the consumer that their product is the best for the consumer's needs.

The OEM is...

- The first point of contact for the consumer due to their size and large marketing budgets
- Not only selling a product, but selling *their* product, and in some cases, also the lifestyle the consumer will enjoy once buying their product
- Selling the glamor and appeal of owning the product
- Very interested in selling the consumer multiple products to fill up the consumers' garage with their brand

The dealer has a key role in selling the product as well. Facts, function, specs, product comparisons, and service capabilities are the language dealers use to persuade consumers to purchase. Dealers also want to persuade the consumer to buy the product from *their* dealership. Statistically, there are significantly less recreation dealers in the US than automotive dealers, so it seems logical that a dealer's argument to buy from their dealership would be an easy sell. However, the consumer can decide to go elsewhere, and what is more, has proven that they are willing to go elsewhere to buy recreation products. **Data indicates that if a consumer leaves a dealer in the recreation industry, they may also leave the brand they were originally interested in.**

The Friction Continues...

Let's imagine a lead came in through the OEM's website and the OEM followed up, marketing the product to the prospect. The lead comes to the dealership set on the brand they have been researching. It should be an easy sell at this point for the dealer, but what happens when the consumer begins to second guess what they are looking for (i.e. because of cost, experience, expectations, availability, e.g.) and starts to eye other brands in the dealer's showroom? As a dealer, the goal is to ensure the customer buys from you. If perhaps they do not buy the OEM's product they initially came in to see that may be ok, but in the long run it will harm the dealership and the OEM.

If a dealer moves a consumer off the OEM brand they came in to see, where does that leave the consumer? It is important to remember that the consumer is always in charge of their own purchase decision and journey. At this point in the purchase process, the consumer might feel confused. They sought out and were excited about one, specific product from the OEM, and maybe the dealer is trying to convince them to buy a different product. What does the consumer do? In some cases, purchasing a different brand than the one a consumer was originally interested in works out well for the consumer because they are buying the product which best fits their needs. This may work out for the dealer as well because they sell a product and all the future post-purchase services and accessories that come with it. It even works out for an OEM, just maybe not the OEM that sent the consumer to the dealership initially.

The Truth Of The Matter

On the surface it seems that everyone wins. But, as an industry, this is not a long-term, effective way to approach recreation sales. Remember that most recreation products are discretionary, i.e. not a “need” product, and any friction the consumer may experience, or friction between the OEM and dealer roles, can reduce the effectiveness of the marketing dollars spent, the effectiveness of leads generated as well as the close rate. It is imperative for all OEMs and dealers to understand this friction, the consumer expectations, and most importantly, what to do to make the purchase and repurchase journey as smooth as possible. The end goal is to increase the return on investment of your marketing dollars and to ensure the consumers’ garage is full of your products.

Why Do Consumers Inquire But Not Buy?

Rollick conducted the first part of a major national study on the recreation industry consumers' purchase experience this year. Over 3,000 recreational product consumers responded to The Lapsed Buyer Study about their views of the recreation buying process. Within the survey, there were four major themes that seemed most important to consumers:

1. Brand consideration and switching
2. Dealer and OEM follow-up
3. Satisfaction drivers
4. Why people leave the market

Together, these four themes paint a picture of where the recreation industry is as a whole. Consumers are demanding more from their OEMs and dealers, and these pain points need to be addressed in order to alleviate the friction experienced between OEMs, dealers and consumers.



Brand Consideration and Switching

The Lapsed Buyer Study shows that consumers almost always end up purchasing the same type of product they were originally interested in, but they may switch brands. This is a concerning consumer behavior with lasting effects on the recreation industry. OEMs and dealers need to work together to provide a cohesive marketing message that creates brand loyalty for consumers and dealers.

81.2%

Seriously Consider Purchasing Other Brands

???



Brand Consideration and Switching

Type
Purchased

93.4%

of consumers purchased the **type** of product they originally inquired about

Brand
Purchased

67.6%

of consumers purchased the **brand** of product they originally inquired about

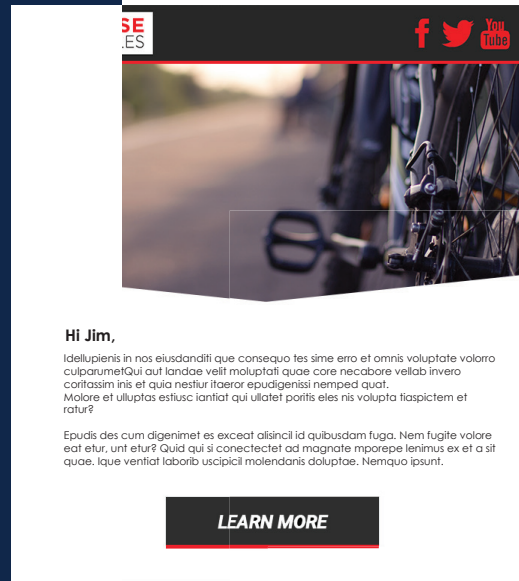
The information about brand switching from The Lapsed Buyer Study tells us that somewhere along the purchase funnel, consumers are being persuaded to switch brands but not products. The reasons for this are multi-faceted and complex, but we know one reason is that dealers have a goal of preferably selling the consumer the product of initial interest. At the end of the day, dealers want to sell them the product that fits the consumers needs, which may be another product on the showroom floor.

This behavior is detrimental for the entirety of the recreation industry. It hurts partnerships and relationships between OEMs and dealers and it dilutes the investment OEMs make in the marketing, nurturing and branding they do before the consumer walks into the dealership. This cyclical behavior can cause friction and poor relationships between dealers and OEMs.

Follow-Up in a Long Purchase Cycle


Keep in mind that, unlike the fast-paced automotive industry, the time to close is much slower in this industry. According to The Lapsed Buyer Study, for the 2017-2018 calendar year, the average days to close (from lead to purchase) was 221 days in marine and 198 days in RV. This is a long purchase cycle. Think about all the nurture opportunities within that time span. However, dealers and OEMs alike are only following-up with consumers an average of one time after the consumer has made contact. This is simply not an effective use of communication in the recreation industry. Over half of dealers follow up with their prospects after initial contact, but a whopping 42.5% of dealers are not following up at all.

Day 1



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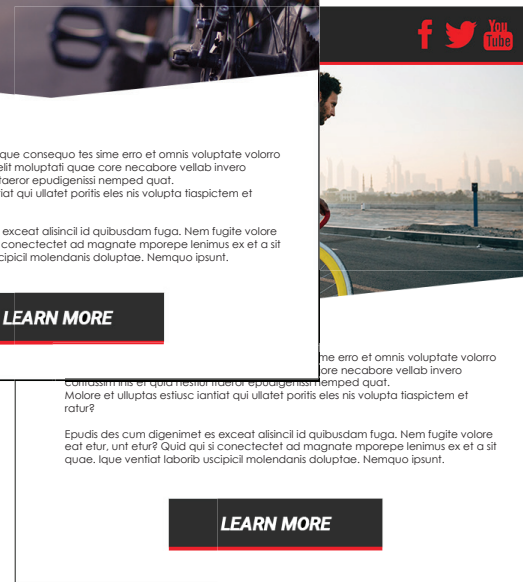
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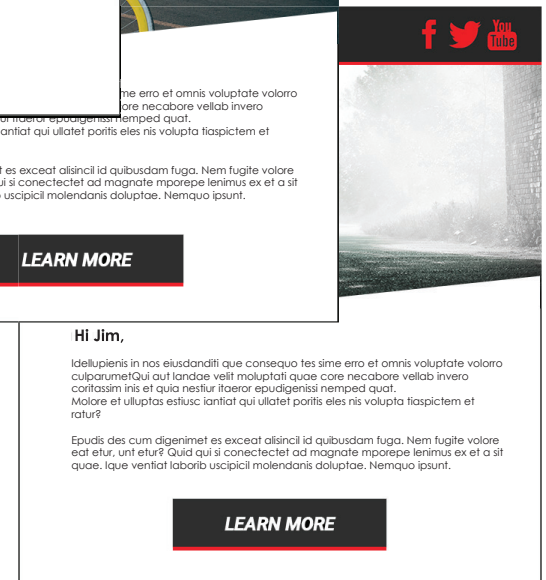
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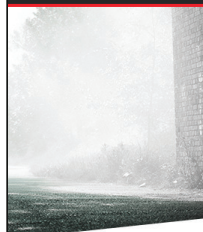
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Are Dealers Following Up?



57.5%

of dealers followed up
after the initial contact

Who Did Consumers Request Information From?

48.5%

requested information from a **dealer**

41.8%

requested information from a **manufacturer**

28.9%

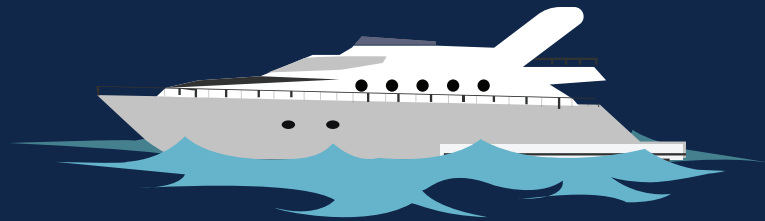
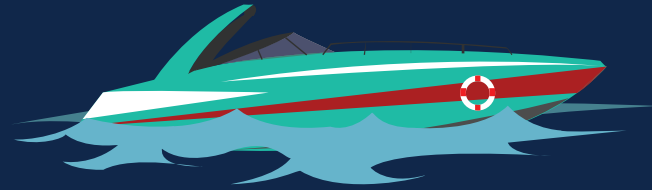
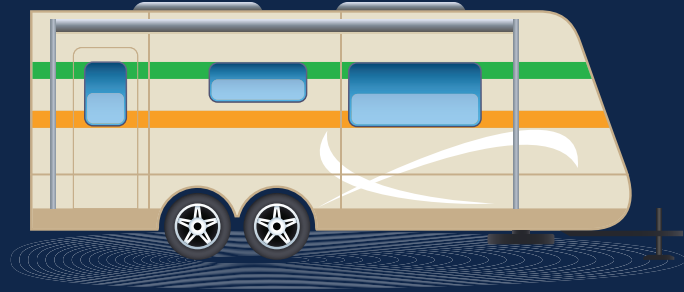
didn't request information



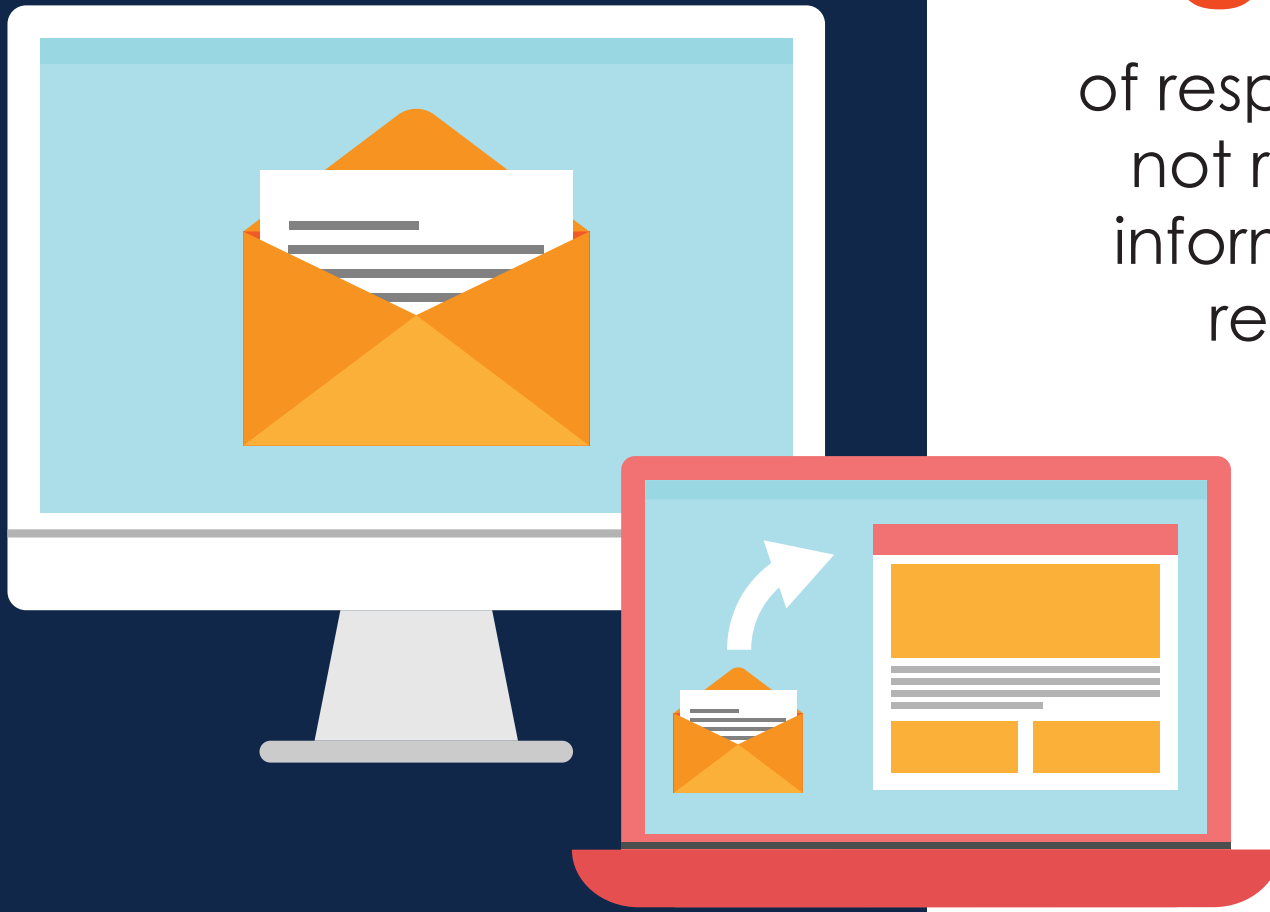
Information Requested On Multiple Models

64.9%

of consumers that requested information inquired about multiple models



Information Received



8.9%

of respondents did not receive the information they requested

Number of Times Dealer Followed Up



Dealer Followed Up
Once

45.1%

Dealer Followed Up
Twice

24.3%

Dealer Followed Up
Three Or More Times

30.6%

Dealers Suggest Other Brands

43.1%

of dealers suggested
other brands



What are the Satisfaction Drivers in the Recreation Industry?

Chart A

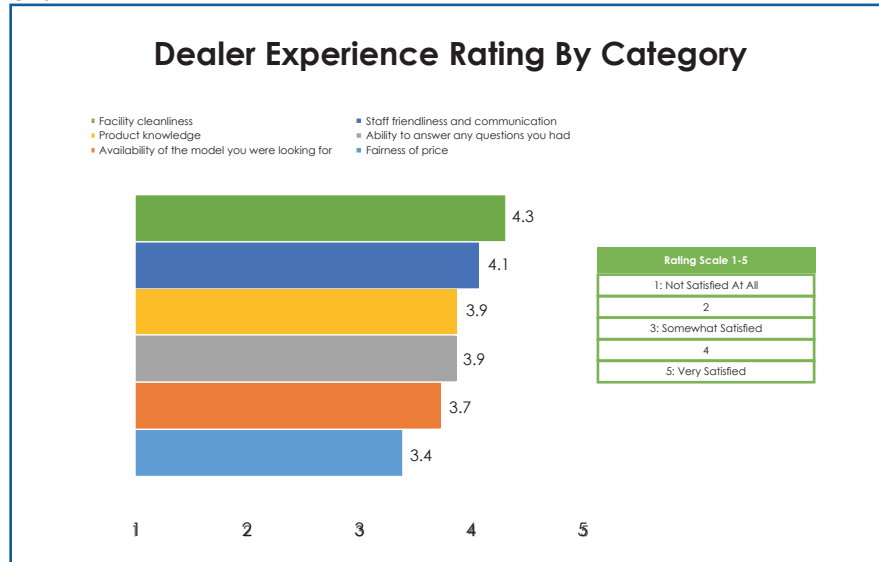
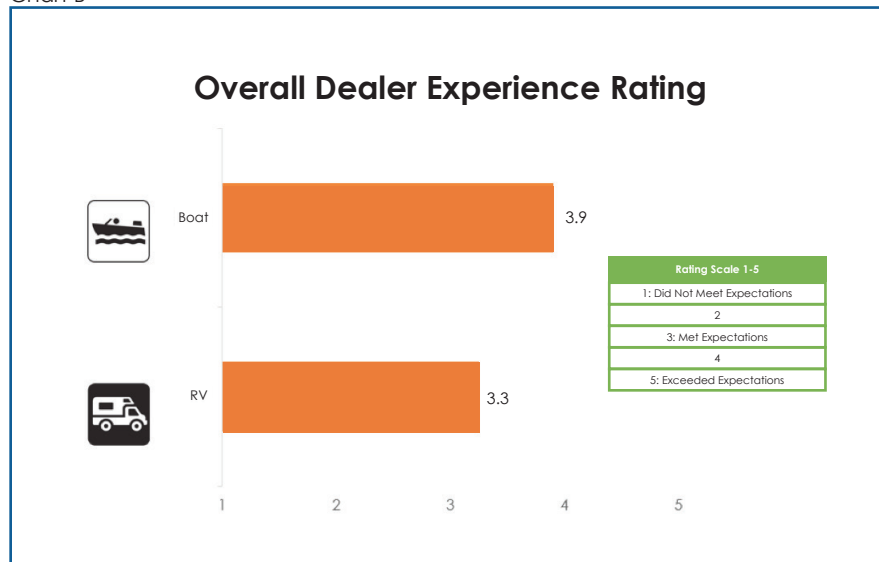


Chart A on the left shows that consumers were mostly satisfied with their dealer experience in all areas except for price. It is noteworthy that price is the one area consumers felt the least confident about because price is an area of contention that causes the aforementioned friction between OEMs, dealers, and consumers. Price is a challenging topic because it can change frequently, and it is hard to assess how much a recreation product will cost a specific consumer, especially with product customization. Many factors can influence price, but in order to be competitive in the recreation space, it is imperative for dealers to communicate price early in the relationship so that consumers walk into a dealership with reasonable and accurate expectations.

Chart B



This is where the Rollick solution can play a role to help alleviate the friction between OEMs, dealers, and consumers. The Rollick solution not only provides accurate, non MSRP price, but also provides deals and discounts to select partner members. Providing an accurate price upfront and online helps the consumer build trust in the dealer and in the OEM. This trust creates brand and customer loyalty, which is the best possible outcome for any dealer or OEM. A loyal customer will have a garage full of your brand's products, from your dealership.

Why Do People Leave the Market or the Original Brand of Interest?

The number one reason consumers decide to either no longer purchase a recreation item or choose to purchase a different recreation brand is due to price (See Charts C and D). The second most common reason a consumer did not purchase the brand they were originally interested in is because they found another brand that better met their needs (See Chart E).

Chart C

Primary Reason(s) for No Longer in Market for Boat/ RV

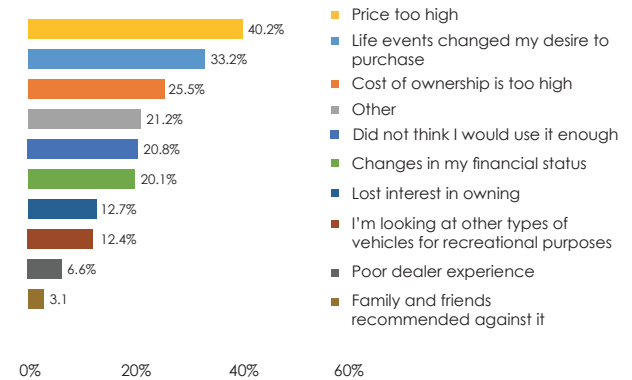
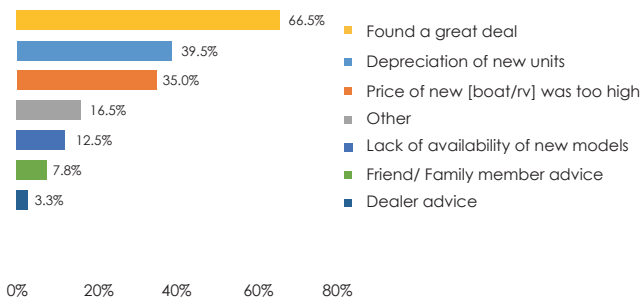


Chart D

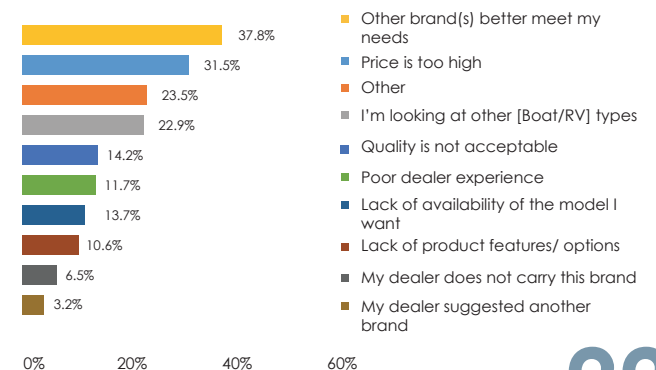
Purchased, Primary Reason(s) for Purchasing Used



What are the primary reason(s) you decided to purchase a used Boat/RV?

Chart E

In Market: Primary Reason(s) for No Longer Considering [Brand]



What are the primary reason(s) you are no longer considering a [Brand]?

At The Heart Of It All: Customer Experience

As OEMs and dealers, it is your job to make sure the consumer feels like they need to have your brand, no matter the price, cost of ownership, life changes, or any other conditions. OEMs need to create brand loyalty and dealers need to see that loyalty through when a consumer walks into a dealership inquiring about a specific brand. Instead of trying to persuade them to buy a different brand, dealers should try and keep consumers committed to their original brand of interest. Consumers can walk into any dealership and ask about any brand, so OEMs and dealers need to make sure their messaging is cohesive and delivers what the consumer is looking for to keep them committed throughout the entire purchase cycle.



3.5/5

On average, respondents indicated their dealer experience met expectations, scoring dealers 3.5 stars out of 5.

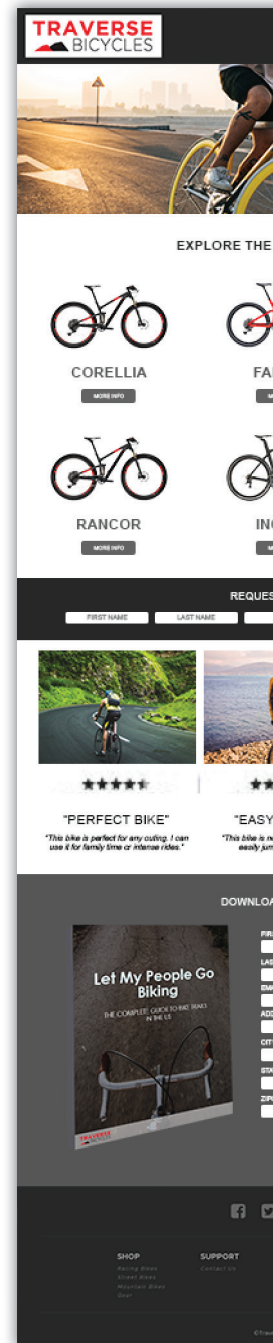
At the core of this entire solution is customer experience. As dealers and OEMs, it is your job to meet and exceed expectations from the first time a consumer visits your website through their post-purchase/ownership experience. On a scale from 1 to 5, 1 being the lowest and 5 being the highest in satisfaction, consumers reported that when purchasing in the recreation space, the experience ranked at a **3.2**, or about the same as their experience shopping in other, similar industries (think automotive). **Yes, 3.2 out of 5 is good but not great**, so it can get better. Enhancing your customer experience from end-to-end is the edge you need to retain existing customers, bring in quality leads, and manage your brand's reputation starting with the OEM and continuing through the dealer.



So, How Can You Improve the Purchase Journey: OEM and Dealer Pre-Purchase Recommendations

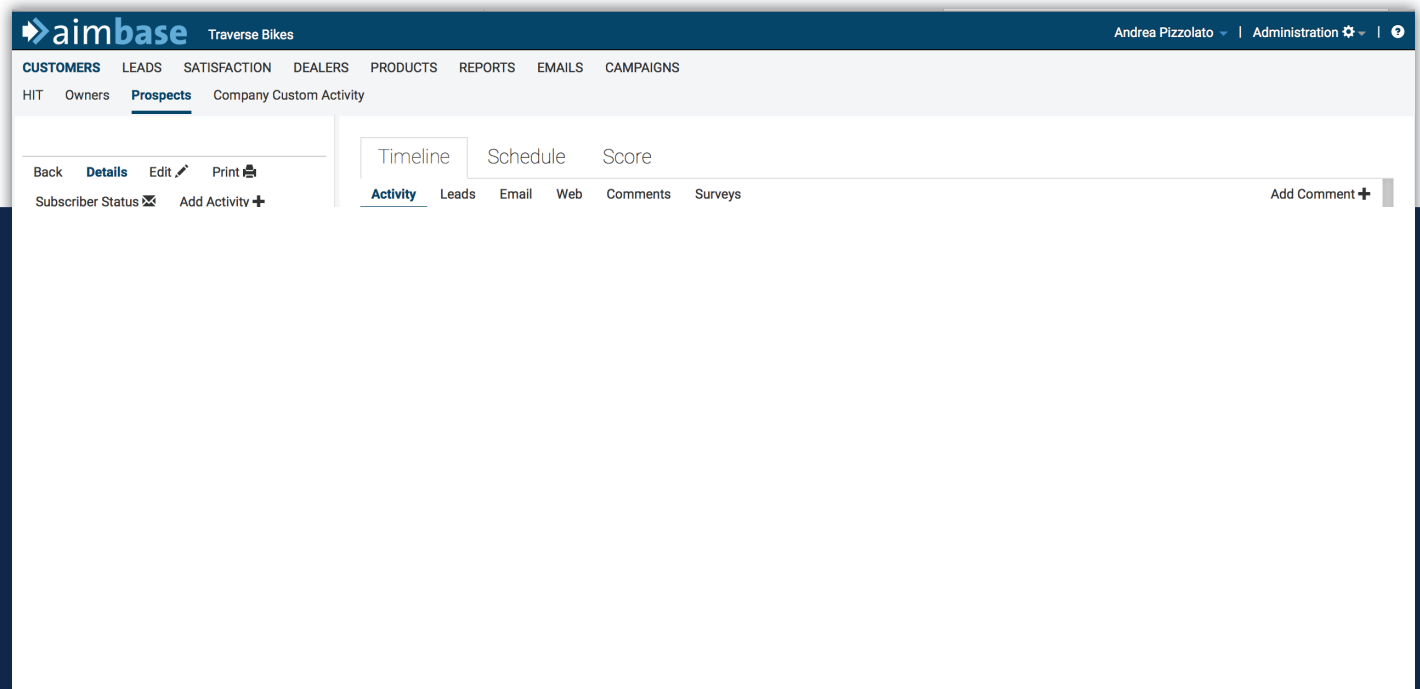
Optimizing consumer engagement with your brand is imperative to set yourself apart. At the heart of a truly excellent and differentiated customer experience is data. Using data-driven insights to deliver highly personalized messaging and interactions has a huge impact on the brands and companies a consumer ultimately chooses to do business with.

It is likely you already have access to a wealth of data in your CRM, marketing automation software, website inquiries, customer service records, browsing history, etc. By integrating each of these sources and adding additional third-party insights, you can deliver highly relevant communication to increase conversion and boost customer retention.



For example, data such as **age, income, and gender** can help you determine the best medium of outreach for that customer, be it **email, phone or text message**. Additionally, information on lifestyle, interests, and hobbies can tell you what type of recreational product that will fit the customer's immediate needs.

It is also important to consider the **data clues** consumers are constantly leaving such as who they are, what they like, and what they'll buy next. Using these types of insights, organizations can **personalize** their outbound marketing and target new consumers before competing brands have the chance to reach out. This can give your brand a huge advantage to influence consumers to purchase. 86% of consumers confirmed that personalization plays a role in their purchasing decisions¹, which further confirms that taking the time to develop a personalized customer experience will pay off every time.²



TRAVERSE
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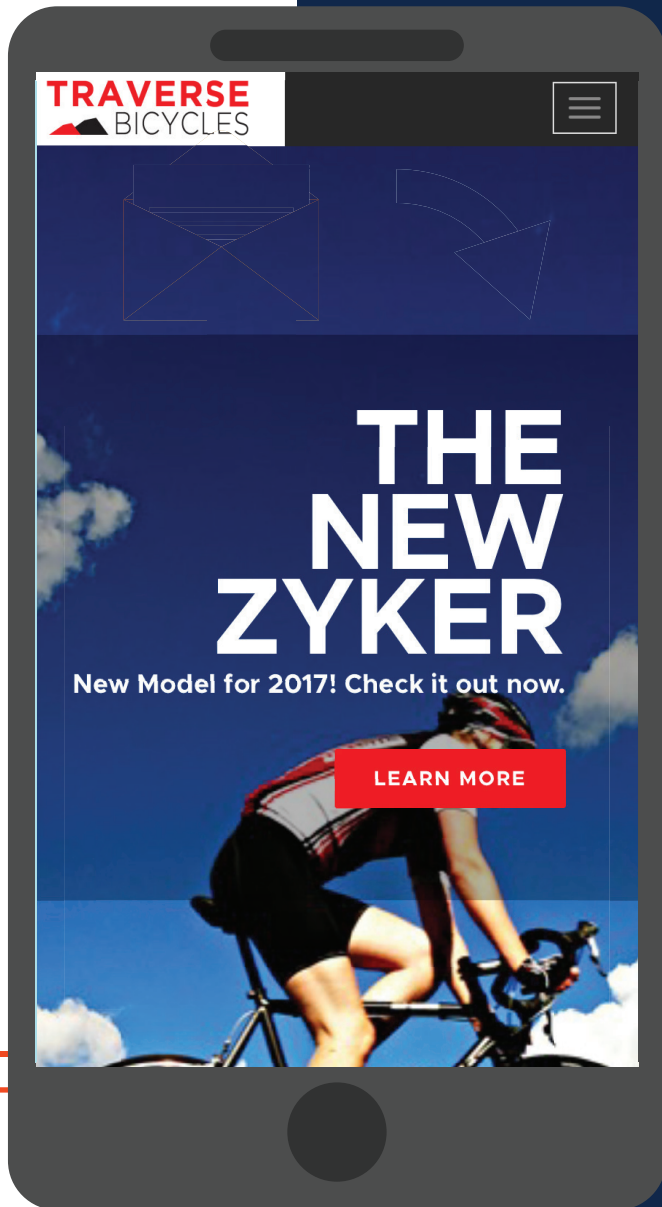
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Personalization is one way to make customers feel engaged and boost their overall experience. This is a tactic that can be utilized throughout the entire purchase process. For example, customers expect to be contacted quickly and with accurate information. As previously mentioned, **only half of dealers followed up with their leads after initial contact**. Manufacturers should closely monitor response times from dealers and consider implementing the use of factory reps to respond to initial contacts to keep the lines of communication open, accurate and honest.



Additionally, dealerships need to focus on optimizing SEO strategies and having a strong presence on third party sites. This increases their SERP (search engine results page) rating and SEO credibility.

Dealer websites need to be clear, concise, and easy to navigate. It is also highly recommended that dealers place well-thought-out lead forms throughout their site. Some key factors to keep in mind include having mobile-optimized design; interactive content such as video, walk-arounds, and online calculators; prominently displayed customer reviews; and highly visible contact information and online inquiry forms.

Lastly, a word on the importance of **pricing** in the customer journey. Remember that garage full of your brand's products? Alleviating the friction created by the multi-line buying process can get you closer to achieving that goal, and **much of the friction in these relationships is caused by price.**

Consumers want to feel like they are getting a fair price, dealers need to sell their products at a competitive price, and OEMs set the MSRP. Consumers often lose their trust in dealers if they are unable or unwilling to provide an accurate quote before stepping foot in their store, which is where the Rollick solution can help. Rollick can easily add their "Get a Quote" pricing tool to any dealer or OEM website. This gives consumers an accurate, up-to-date pricing guide that they can see instantly and feel confident in. **This creates trust between the brand and the consumer, increasing the likelihood to receive a quality lead, and speeding up the purchase process.**



How Can You Improve the Re-Purchase Journey: OEM and Dealer Re-Purchase Recommendations

From the very first interaction a potential customer has with your brand, all the way through to the post-purchase follow-up and ownership experience, OEMs and dealers take on responsibility for ensuring each customer feels valued and has a positive experience.

Today, 80 percent of a typical company's future revenue will come from just 20 percent of its existing customers.³ This underscores the importance of pre- and post-purchase customer service and means OEMs and dealers need to ensure a flawless customer experience that exceeds expectations.

Probability of Selling to Existing Customer⁴

60%-70%

Probability of Selling to New Customer⁴

5%-20%

Returning customers spend an average of

67%

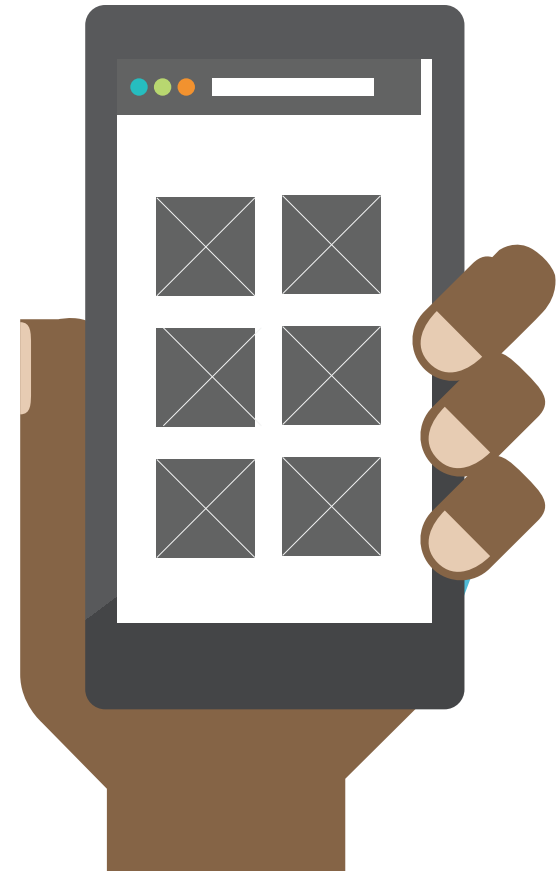
more than first-time customers.⁵

Believe it or not, the post-purchase experience is one of the most critical phases OEMs and dealers should consider. Think about the experience from the customer's perspective. They just made an enormous investment, possibly the second- or third-largest investment that they'll ever make outside their home or vehicle. Is your work done, or should you think about how you can help those customers maximize their enjoyment once the initial sale is complete?

Priority number one should be to follow up with those customers. Consider a thank you, a simple check-in to see how it's going. Or, even better, a genuine attempt to connect the consumer with a great place to go boating, RVing or off-roading, a group of owners, dealership events, or other opportunities to continue and grow your relationship with the consumer.



Remind the consumer why they purchased from your dealership in the first place and how your dealership and service goes above and beyond. Provide meaningful content via email and social media, such as what to do when you hit 250 engine hours or Top 5 Tips for Storing Your Boat This Winter. Keep the brand top of mind, but do not overload them with offers and promotions. Provide opportunities for consumers to be engaged with your content so they feel heard and valued.



Survey Your Customers and Improve Relationships

One of the most valuable post-purchase tools is a satisfaction survey. Through their CSI (customer satisfaction index) program, Rollick has sent out hundreds of thousands of surveys to recreation consumers on behalf of manufacturers.


These surveys give the consumer an opportunity to voice their opinions (good and bad) about the product, the dealership and the overall purchase and service experience.





The value of a CSI program is twofold:

1. The ability to gather positive customer feedback to use to promote your dealership (a.k.a. customer reviews); and
2. To understand where your dealership can improve to make the customer experience better

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Ratings and reviews are an invaluable way to convince people to come look at your products in person. Not convinced? **88% of consumers trust online reviews as much as personal recommendations** and **72% of consumers say positive reviews make them trust businesses more.**⁶

Millennials trust user-generated content 50% more than any other media.⁷ User-generated content is also 20% more influential when it comes to purchasing and 35% more memorable than other types of media.⁸

At the end of the day, remember that **more than half of Americans have scrapped a planned purchase or transaction because of a bad service experience**, so make sure you do everything in your power to provide the highest quality customer experience possible.⁹

In Conclusion...

Engaged customers are loyal customers. It falls on the OEMs and dealers to work together to provide an exceptional customer experience. Engagement and loyalty are ultimately driven by experience, spanning from pre-purchase, to the in-store experience and through post-purchase. Take the opportunity to review and find ways to improve the experience you provide for your customers and you will be glad you did.

The discretionary buyer has different needs than a buyer in a necessity market. There are also influences dealers and OEMs cannot control, like economy, available free time, family makeup, etc., but what they can control is an integrated solution between OEM and dealer to keep the consumer (and the dealer) interested in purchasing or selling the brand the consumer initially inquired about. Technology such as Rollick's price tool and Aimbase Marketing Automation can help keep OEMs and dealers on track to achieve these goals together.

The amount of product a dealer sells from any OEM drives influential factors like relationships, pricing deals, marketing tactics, etc. While a dealer might have gained a customer if they sell them a different brand than the one initially inquired about, the dealer did not help the OEM partner to fill that consumers' garage with the original OEM's products. This is a mutually detrimental behavior for the recreation industry. For this reason, OEMs and dealers need to work together to alleviate this behavior and thus, the friction to achieve a positive, wholistic and sustainable purchase experience for the consumer.

Footnotes and Attribution

1. <https://searchengineland.com/88-consumers-trust-online-reviews-much-personal-recommendations-195803>
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8. Local Consumer Review Survey. Bright Local, 2014
9. American Express, 2018 #WellActually, American Say Customer Service is Better Than Ever

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ROLCLICK

Rollick connects manufacturers, dealers and in-market consumers in the powersports, RV, marine and industrial equipment industries to deliver a seamless customer journey. Rollick's solutions include new customer acquisition, enterprise lead management, customer experience/loyalty and marketing automation. In addition, the company has rapidly built a national outdoor recreational vehicle buying network to include hundreds of dealers, over 80 manufacturers and an affinity partner network with access to over 150 million high-quality customers including policy holders of major insurance providers, employees at more than 2,000 top U.S. companies, members of the military, veterans and first responders. For more information, visit [Rollick](#).

AimBASE

Aimbase is the only marketing technology solution in the recreation and industrial equipment industries that combines enterprise lead management, marketing automation, and customer lifecycle management in ONE platform. OEMs utilize Aimbase as their go-to solution to manage and track the entire customer journey from pre-purchase through re-purchase, measure dealer sales and quoting performance and customer satisfaction programs.