

## Indian Motorcycle Dealers Ranked Highest in 2024 Pied Piper Internet Lead Effectiveness Study

The industry's average performance declined; increased use of texting was offset by lower speed and quality of email and phone responses.



By **Meagan Kusek**

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Accepting the trophy from Pied Piper CEO Fran O'Hagan (left) were Joel Harmon, Polaris vice president, on-road sales and market development (center) and Aaron Jax, vice president, Indian Motorcycle (right).

Polaris Inc.'s Indian Motorcycle dealerships were ranked highest according to the 2024 Pied Piper PSI Internet Lead Effectiveness (ILE) Study, which measured responsiveness to internet leads coming through powersports dealership websites. Following Indian were Harley-Davidson, Polaris Off-Road, Triumph and BMW.

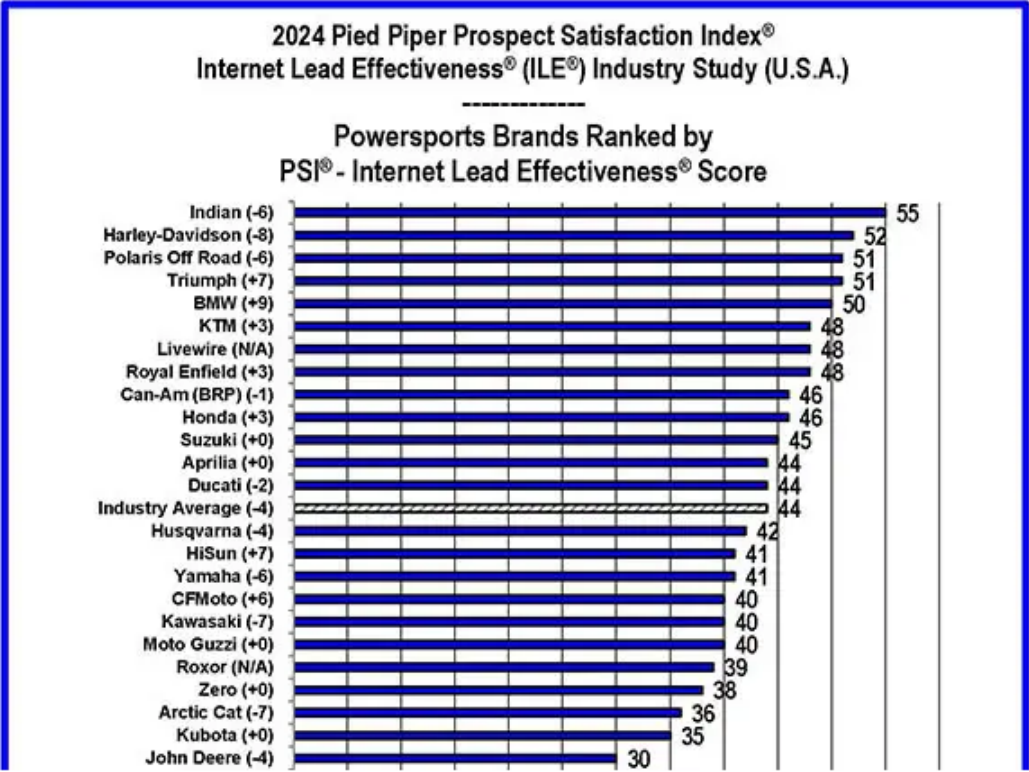
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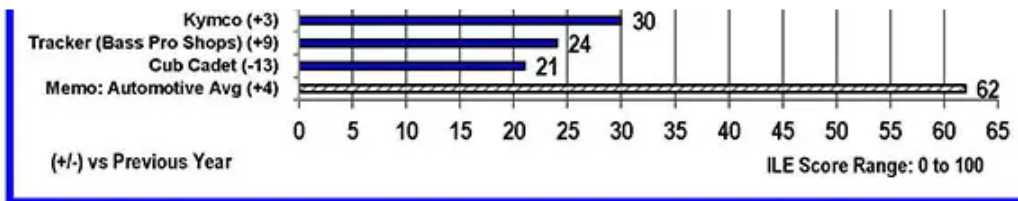
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Pied Piper submitted mystery-shopper customer inquiries through the individual websites of 3,718 powersports dealerships, asking a specific question about a vehicle in inventory and providing a unique customer name, email address and local telephone number. Pied Piper then evaluated how the dealerships responded by email, telephone and text message over the next 24 hours.

Powersports industry average ILE performance declined over the past year. “2024 is a much more challenging business environment for powersports dealers,” said Fran O’Hagan, Pied Piper’s CEO. “New digital retail tools and effective web-response processes are more prevalent today post-pandemic, but powersports dealers are challenged to retain skilled employees to use those tools and processes effectively.”

Twenty different quality and speed-of-response measurements generate dealership ILE scores, which range from zero to 100. Dealerships which score above 80 provide a quick and thorough personal response by email and phone — and often text too. In contrast, dealerships which score below 40 fail to personally respond in any way to their website customers. For top-scoring Indian Motorcycle, 24% of its dealerships scored over 80, while 32% scored under 40. In contrast, measurement of the overall powersports industry showed that only 14% of dealerships scored over 80 while 43% scored under 40. “The effort is worth it,” said O’Hagan. “On average, dealerships that score over 80 sell 50% more vehicles to the same quantity of website customers, compared to dealerships that score under 40.”





Source: 2024 Pied Piper Powersports Internet Lead Effectiveness Industry Study (USA)

www.piedpiperpsi.com

Brands with the greatest improvement from last year included BMW, Triumph, Honda and Royal Enfield. The performance of 11 of 27 brands declined. Brands suffering the largest drops included Kawasaki, Arctic Cat, John Deere, Harley-Davidson and Yamaha.

Dealerships this year were slightly more likely to respond to online customer inquiries by text message than in previous years. However, the increase in use of text messages was negatively offset by declining performance through other communication channels. Quick response by phone was less common, and use of email to answer customer questions dropped compared to last year. Dealerships industrywide also responded with less quality content on average compared to last year, with only three of 16 content measurements improving over last year's numbers.

The most successful dealerships respond to their web customers through multiple channels — text, phone, email — to avoid customers missing an email or text or not answering their phone. In this year's study, 26% of dealers responded using multiple channels, down from 27% last year. A smaller group, 15% of dealers, not only responded using multiple channels but did so within 30 minutes, down from 17% last year.

**Pied Piper Prospect Satisfaction Index® (PSI®)  
Motorcycle & UTV Brands  
Internet Lead Effectiveness® (ILE®) Scores 2020 through 2024**

Brand	ILE Score						
	2024	2023	2022	2021	2020	Change 2023 to 2024	Change 2020 to 2024
Indian	55	61	58	55	54	-10%	2%
Harley-Davidson	52	60	60	56	56	-13%	-7%
Polaris Off Road	51	57	51	46	43	-11%	19%
Triumph	51	44	44	40	43	16%	19%
BMW	50	41	45	46	45	22%	11%
KTM	48	45	40	37	39	7%	23%
Livewire	48	N/A	N/A	N/A	N/A	N/A	N/A
Royal Enfield	48	45	44	39	N/A	7%	N/A



Can-Am (BRP)	46	47	45	40	41	-2%	12%
Honda	46	43	39	32	38	7%	21%
Suzuki	45	45	37	36	41	0%	10%
Aprilia	44	44	37	40	37	0%	19%
Ducati	44	46	41	43	46	-4%	-4%
Husqvarna	42	46	42	38	37	-9%	14%
HiSun	41	34	31	33	28	21%	46%
Yamaha	41	47	38	37	42	-13%	-2%
CFMoto	40	34	33	40	31	18%	29%
Kawasaki	40	47	37	35	42	-15%	-5%
Moto Guzzi	40	40	40	40	36	0%	11%
Roxor	39	N/A	N/A	35	37	N/A	5%
Zero	38	38	36	42	37	0%	3%
Arctic Cat	36	43	33	32	31	-16%	16%
Kubota	35	35	24	26	30	0%	17%
John Deere	30	34	30	33	37	-12%	-19%
Kymco	30	27	26	26	34	11%	-12%
Tracker (Bass Pro Shops)	24	15	14	17	11	60%	118%
Cub Cadet	21	34	31	31	25	-38%	-16%
INDUSTRY AVERAGE	44	48	43	40	42	-8%	5%
Memo: Auto Industry Avg	62	58	55	55	57	7%	9%

Source: 2020-2024 Pied Piper PSI® Internet Lead Effectiveness® Studies (USA) - Scale 0 to 100 www.piedpiperpsi.com

Response to customer web inquiries varied by brand and dealership, and the following are examples of performance variation by brand:

- **How often did the brand's dealerships email an answer to a website customer's inquiry?**
  - **More than 50% of the time on average:** Moto Guzzi, Indian, BMW
  - **Less than 25% of the time on average:** Livewire, Kymco, Yamaha, Zero, Tracker
- **How often did the brand's dealerships text an answer to a website customer's inquiry?**
  - **More than 30% of the time on average:** Royal Enfield, Harley-Davidson, Livewire, Triumph, Zero, Indian
  - **Less than 10% of the time on average:** Kubota, John Deere, Kymco, Cub Cadet, Tracker
- **How often did the brand's dealerships respond by phone call to a website customer's inquiry?**
  - **More than 50% of the time on average:** Tracker, Livewire, Harley-Davidson, Indian, Suzuki, BRP
  - **Less than 25% of the time on average:** Roxor, John Deere, Cub Cadet
- **"Did both": How often did the brand's dealerships email or text an answer to a website customer's question and also respond by phone call?**
  - **More than 30% of the time on average:** Harley-Davidson, Indian, Livewire
  - **Less than 10% of the time on average:** Cub Cadet, Tracker, Kymco
- **"Did at least one": How often did the brand's dealerships email or text an answer to a website customer's question and/or respond by phone?**
  - **More than 80% of the time on average:** Royal Enfield, Indian, KTM
  - **Less than 60% of the time on average:** Kymco, John Deere, Zero, Cub Cadet

"Three out of 10 powersports web customers today who inquire about a vehicle will

be ghosted by the dealership,” said O’Hagan. “Too often, a dealership’s response today is nothing or only an auto-response, the modern equivalent of a form letter.” Pied Piper has found that the key to driving improvement in website response and in turn higher sales is showing dealers what their website customers are really experiencing — which is often a surprise.

The Pied Piper PSI Internet Lead Effectiveness (ILE) Studies have been conducted annually since 2011. The 2024 Pied Piper PSI-ILE Study (U.S.A. Powersports) was conducted between May 2023 and February 2024 by submitting website inquiries directly to a sample of 3,718 dealerships nationwide representing all major powersports brands.

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