



INDIAN WINS INTERNET RACE

Industry Enters 5th Year Of ILE Stagnation

You can lead a horse to water, but you can't make it drink... Same holds true of dealers in terms of internet lead effectiveness, according to Pied Piper's

founder Fran O'Hagan. The flood of AI tools and online technology has not brought about any real breakthroughs when it comes to responding to sales leads. "More than half of customer inquiries remain unanswered after 24 hours is the industry-wide standard," he notes. "Only one in three customers received a response that included next steps of any kind, and only one in 10 dealerships industry-wide offered an appointment."

The bright spot for Mike Kennedy and the new ownership team is that Indian Motorcycle dealerships were ranked highest in the 2026 Pied Piper PSI Internet Lead Effectiveness (ILE®) Study. The ILE measures dealership responses to Internet sales leads. Pied Piper submitted customer inquiries through 2,133 powersports dealership websites representing all major brands.

Indian dealerships maintained their top rank among powersports brands for the fourth year in a row and achieved an average ILE score of 55 out of 100. The total powersports industry, meanwhile, remains stagnant, with the average dealership ILE score stalled in the mid-40s for the fifth year in a row, with many chronic fixable web response issues remaining.

"More than half of powersports customers still receive no personal response to their web inquiry," notes Cameron O'Hagan, Vice President of Metrics & Analytics at Pied Piper. "The solution is simple. Dealers are twice as likely to be top performers if they commit to responding to web customers at least once each day and receive monthly web-response measurement as a reminder of what's really happening."

OPPORTUNITY IS KNOCKING

Despite the tools and explosion of AI solutions, dealer responses have not really improved in the past five years. "The 2026 Powersports industry's average ILE score remained at 44 for the third straight year, a relatively low ILE score indicating systemic improvement needed," claims Cameron O'Hagan. According to Pied Piper, the following are key challenges identified in the 2026 study that remain prominent throughout the powersports industry:

- **Low and Worsening Rate of Answering Questions** - Only 47% of dealers industry-wide answered a website customer's question by email/text in this year's study, a trend that has worsened by 1% since 2022. In effect, the average dealer industry-wide has continued to miss out on approximately half of their web leads from 2022 to present.
- **Continued Low Rates of Offering Appointments** - Compared to last year, an additional 3% of powersports dealers suggested to website sales customers an appointment for a specific date and time. However, the overall rate for offering appointments remains at only 13% of the time on average, leaving more than 8 out of ten customers without an offer of an appointment.
- **Only Half of Powersports Dealers Phone Their Web Customers** - Despite being arguably the most critical follow-up path for conversion, the rate of contacting website sales customers by phone remained unchanged, averaging 50% of the time industry-wide in the 2026 study. By not picking up the phone, dealers forfeit roughly half of their website sales opportunities.

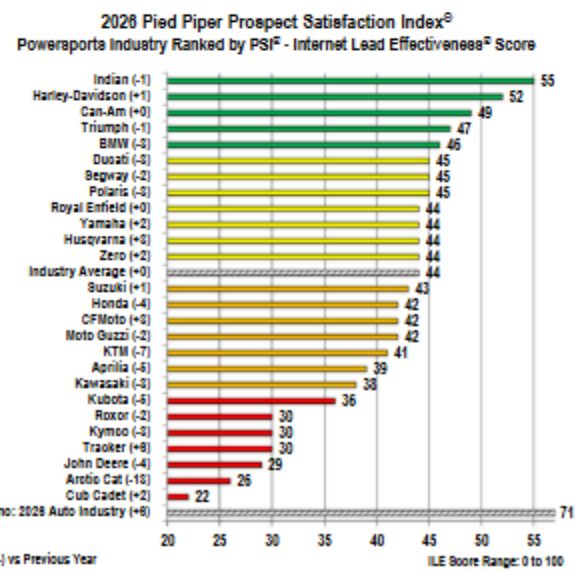
How Has Indian Taken Top Honors 4 Years In A Row?
Indian Motorcycle dealers continued to be the top performing dealerships in website sales lead response behaviors for the fourth year in a row. Indian dealers were more likely to use a combination of calls, texts, and emails when responding to customers, and had the lowest rate of failing to respond out of the brands measured.

Oddly, prior parent company Polaris finished 10 points behind Indian. The differentiating factor for Indian was simply they made less mistake. The three things that stand out most to Pied Piper are:

- 1) Highest Rate of "Doing Both"** - Indian dealers were most likely to utilize multi-channel responses (answering the customer's question by email/text while also calling) compared to other powersports brands. Response rate was 39% of the time on average for Indian. It was only 24% of the time throughout the overall industry. Without this commitment it is too easy to miss a customer who ignores a phone call or text or fails to check their email.
- 2) Least Number of "Crickets"** - Based on the 2026 study findings, only one in 25 Indian website customers received no response. Customers industry-wide were more than twice as likely on average to be left without a response of any kind.
- 3) Monthly ILE Reporting** - Indian Motorcycle dealerships receive a regular "tap on the shoulder" via monthly ILE reports that "shine a light" on behaviors that are otherwise often invisible and too easy for busy employees to neglect. This increased awareness has consistently driven and sustained stronger performance.

Pied Piper Prospect Satisfaction Index® (PSI®) 2026 Powersports Industry (USA) Internet Lead Effectiveness® (ILE®) Behavior Rankings								
Brand	ILE Score (Dealership Average)	"Excellent Speed and Quality" % of a brand's dealerships with an ILE score over 80	"Slow and/or Unhelpful" % of a brand's dealerships with an ILE score under 40	"Answered Question" % of a brand's dealerships that email and/or text an answer to a website customer's question	"Phoned Customer" % of a brand's dealerships that respond by phone to a website customer inquiry	"Did Both" % of a brand's dealerships that answered customer's question by email/text and also phoned customer	"Attempted to set an appointment" % of a brand's dealerships that attempted to set an appointment for specific date/time	"Failed to Respond" % of website customers that failed to receive a response of any type (email, text, or phone call)
Indian	55	25%	30%	67%	64%	39%	25%	4%
Harley-Davidson	52	21%	35%	55%	64%	39%	16%	9%
Can-Am	49	13%	40%	42%	70%	29%	26%	5%
Triumph	47	12%	31%	67%	43%	31%	7%	12%
BMW	46	12%	35%	70%	37%	30%	11%	12%
Ducati	45	17%	45%	70%	34%	28%	13%	9%
Polaris	45	13%	41%	49%	44%	22%	15%	9%
Segway	45	22%	51%	38%	46%	24%	19%	5%
Husqvarna	44	7%	46%	59%	43%	28%	2%	7%
Royal Enfield	44	8%	44%	52%	48%	29%	8%	6%
Yamaha	44	8%	47%	45%	47%	19%	14%	5%
Zero	44	9%	30%	64%	30%	21%	9%	15%
Suzuki	43	9%	49%	51%	49%	26%	9%	4%
CFMoto	42	3%	47%	50%	52%	20%	3%	5%
Honda	42	6%	46%	46%	55%	26%	4%	4%
Moto Guzzi	42	16%	47%	53%	34%	22%	13%	13%
KTM	41	10%	43%	59%	37%	24%	2%	16%
Aprilia	39	10%	57%	50%	43%	29%	17%	14%
Kawasaki	38	6%	49%	35%	46%	14%	10%	12%
Kubota	36	10%	60%	41%	39%	20%	4%	13%
Kymco	30	6%	71%	32%	12%	6%	3%	6%
Roxor	30	2%	71%	38%	19%	8%	2%	15%
Tracker (Bass Pro Shops)	30	0%	63%	14%	51%	6%	0%	14%
John Deere	29	3%	63%	41%	19%	10%	3%	24%
Arctic Cat	26	0%	68%	27%	27%	5%	2%	16%
Cub Cadet	22	0%	78%	36%	8%	2%	0%	20%
Powersports Industry	44	11%	45%	47%	50%	24%	13%	9%
Memo: Automotive Avg	71	51%	14%	78%	74%	82%	32%	5%

Source: 2022-2026 Pied Piper PSI® Internet Lead Effectiveness® Studies (USA) - Scale 0 to 100 www.piedpiperpsi.com



Source: 2026 Pied Piper® Powersports Internet Lead Effectiveness® Study (USA)

Pied Piper Prospect Satisfaction Index® (PSI®) Powersports Industry (USA) Internet Lead Effectiveness® (ILE®) Scores 2022 through 2026							
Brand	2026	2025	2024	2023	2022	Change 2025 to 2026	Change 2022 to 2026
Indian	55	56	55	61	58	-2%	-3%
Harley-Davidson	52	51	52	60	60	2%	-13%
Can-Am	49	49	46	47	45	0%	9%
Triumph	47	48	51	44	44	-2%	7%
BMW	46	49	50	41	45	-6%	2%
Ducati	45	48	44	46	41	-6%	10%
Polaris	45	48	51	57	51	-6%	-12%
Segway	45	47	N/A	N/A	N/A	-4%	N/A
Husqvarna	44	41	42	46	42	7%	5%
Royal Enfield	44	44	48	45	44	0%	0%
Yamaha	44	42	41	47	38	5%	16%
Zero	44	42	38	38	36	5%	22%
Suzuki	43	42	45	45	37	2%	16%
CFMoto	42	39	40	34	33	8%	27%
Honda	42	46	46	43	39	-9%	8%
Moto Guzzi	42	44	40	40	40	-3%	5%
KTM	41	48	48	45	40	-15%	2%
Aprilia	39	44	44	46	37	-11%	5%
Kawasaki	38	41	40	47	37	-7%	3%
Kubota	36	41	35	35	24	-12%	50%
Kymco	30	33	30	27	26	-9%	15%
Roxor	30	32	39	N/A	N/A	-6%	N/A
Tracker (Bass Pro Shops)	30	24	24	15	14	25%	114%
John Deere	29	33	30	34	30	-12%	-3%
Arctic Cat	26	39	36	43	33	-33%	-21%
Cub Cadet	22	20	21	34	31	10%	-26%
Powersports Industry	44	44	44	48	43	0%	2%
Memo: Automotive Avg	71	65	62	58	55	9%	29%

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The 2026 brand performance comparison breaks out some significant shortcomings in ILE policies across the board. Indian wasn't always on top in every category, but they were never in the bottom of any category and they were #1 when it came to "doing both" — that made the difference overall.

• **Answered Question** — How often did the brand's dealerships email or text an answer to a website customer's question?
• More than 65% of the time on average: BMW, Ducati, Indian, Triumph
• Less than 35% of the time on average: Kawasaki, Kymco, Arctic Cat, Tracker (Bass Pro Shops)
Industry average: 47% Powersports; by comparison Automotive 78%

• **Phoned Customer** — How often did the brand's dealerships respond by phone to a website customer's inquiry?
• More than 50% of the time on average: Can-Am, Harley-Davidson, Honda, Indian, CFMoto
• Less than 20% of the time on average: Roxor, John Deere, Kymco, Cub Cadet
Industry average: 50% Powersports; Automotive 74%

• **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: Can-Am, Indian, CFMoto, Harley-Davidson
• Less than 50% of the time on average: Roxor, Cub Cadet, Kymco
Industry average: 72% Powersports; Automotive 90%

• **Did both** - How often did the brand's dealerships email or text an answer to a website customer's question and also phone the customer?
• More than 30% of the time on average: Indian, Harley-Davidson, Triumph, BMW
• Less than 10% of the time on average: John Deere, Roxor, Kymco, Tracker (Bass Pro Shops), Arctic Cat, Cub Cadet
Industry average: 24% Powersports; Automotive 62%

• **Failed to Respond** - How often did the website customer fail to receive a response of any type (email, text, or phone call)?
• Less than 5% of the time on average: Indian, Suzuki, Honda, Can-Am, Segway, Yamaha, CFMoto
• More than 15% of the time on average: John Deere, Cub Cadet, Roxor
Industry average: 9% Powersports; Automotive 5%

BOTTOM LINE:


Why Are ILE Scores Valuable To Measure?

Each brand's ILE score represents an average of web inquiry response behaviors of their individual dealers, including top-performers and poor performers, each with a score ranging from 0-100. (see methodology sidebar)

In this year's study, only 11% of all dealerships measured scored above 80 (providing a quick and thorough personal response), while 45% of dealerships scored below 40 (slow and/or unhelpful responses).

"With nearly half of powersports dealers in this year's study scoring under 40, many brands and dealers are leaving significant opportunity on the table," said O'Hagan. "The effort to improve is worth it. Historically, dealers who improve their ILE performance from scoring under 40 to scoring over 80 on average sell 50% more units from the same quantity of internet leads."

There was a slight negative migration trend for the "over 80" and "under 40" categories observed in the 2026 study, with 2% fewer dealers scoring over 80 and 3% more dealers scoring under 40 compared to last year.

Many dealers underperform, but the success of others shows that improvement is achievable, and clearly worth the effort. 

METHODOLOGY

Each of the 2,133 ILE study evaluations asked a specific question about a motorcycle or side-by-side in inventory, during normal business hours. Each location interacted with a customer new and unique to their website and dealership, with a new customer name, email address, and local telephone number used for each evaluation.

Pied Piper then evaluated the speed and quality of responses sent by email, telephone, chat, and text message within the next 24 hours following each inquiry. ILE evaluations consist of over 20 different weighted measurements, linked to best practices mathematically likely to generate sales. These measurements combine to create an overall ILE score ranging between zero and 100 for each dealership, which are then consolidated into ranked brand and industry averages.

ABOUT PIED PIPER

Austin, Texas-based Pied Piper combines artificial intelligence and trained human evaluators to measure the proprietary Prospect Satisfaction Index® (PSI®). PSI® measures how effectively each retail location follows proven sales and service best practices throughout a new customer's journey, from initial website inquiry or phone call, through follow-up and appointment setting.

Manufacturers, franchisors, dealer groups, and other organizations use PSI® reporting to drive measurable improvement across their retail networks. The most common reaction: "We just didn't know." As AI and human processes increasingly overlap, only independent measurement exposes hidden failures and drives real improvement.

www.piedpiperpsi.com 



AI CAN'T DO IT ALL

But what we consistently observe in the auto industry is that “fancy fixes” rarely drive meaningful, sustained improvement. Instead, the results almost always come from something far less glamorous: (and dare we say kinda Luddite) leadership commitment to simple, disciplined human processes.

That’s true even though the auto industry already has access to the most advanced tools and technology available. Take <https://tekion.com/> for example, after ~10 years, Tekion hasn’t taken meaningful share despite a lot of what seem like great ideas. Why?

Switching a DMS (and the processes around it) is an enormous, daunting step; most dealers won’t move, even for something better or cheaper.

Software alone doesn’t fix weak operations. In powersports we’ve seen that having a CRM vs. none makes zero difference in web-response behaviors; even outsourced help (e.g., Scott Fischer’s DLP) failed without committed dealerships.

AI helps, but we’re seeing in auto right now that overreliance (“the AI will handle it”) leads to missed follow-up and poor outcomes. What works: keep it dead simple — no big changes or heavy spend.

- **Commitment to Respond:** Don’t lock up the store with digital customers stranded inside any more than you would leave with physical customers still standing in the showroom. Respond personally to every web lead, at least once each day; no exceptions.


- **Measurement of Behaviors:** Don’t rely on dashboards, reports, or what you’re told. They can mislead or miss critical facts. (“Yes, we responded”...

with a boilerplate auto-reply.) Instead, measure what customers actually experience: phone, text, chat, email. Without that, problems stay invisible and usually come as a surprise.

Pied Piper makes that measurement dead simple with ILE: after measurement, a 90-second audio summary is texted directly to the GM, plus they have immediate access to “Piper Answers” chat: ask what went wrong, how to improve, how others perform. Super simple and easy; no reports to read, no dashboards to log into. Getting that 90-second summary is a “conscience” and reminder to pay attention to a critical part of the business that is otherwise too often invisible.

We know this works because it has already driven big improvement in powersports. A great example is Polaris off-road: 1,400 dealerships from small rural stores to the largest operations. When Polaris made ILE part of its dealer program with monthly measurement, the average performance of their 1,400 dealers jumped from “typical powersports” in 2020 to in 2023 performing like the average auto dealer. When the program ended, performance slipped, though it still remains above the industry average.

I think it’s a bit like the best motocross racers: they don’t spend their time chasing shortcuts in better bikes or gear; they commit to practicing day after day; with a lap timer that tells them the truth, every lap. —

Fran O’Hagan 

 **MEASURE, REPORT & IMPROVE**

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