



## **SUBARU DEALERS RANK HIGHEST IN 2025 AUTO INDUSTRY STUDY MEASURING RESPONSE TO WEBSITE CUSTOMERS**

- **Subaru top-ranked for first time**
- **Overall industry continued its upward trend**
- **Room for improvement: 1 in 5 online inquiries received no personal response**

**MONTEREY, CALIFORNIA, USA – March 3, 2025** – Subaru dealerships ranked highest in the 2025 Pied Piper PSI® Internet Lead Effectiveness® (ILE®) Auto Industry Study, which measured responsiveness to internet sales leads coming through dealership websites. Following Subaru were Infiniti, Acura, Toyota and Lincoln.

Pied Piper submitted customer inquiries through the websites of 4,023 automobile dealerships representing all major brands. Each inquiry asked a specific question about a vehicle in inventory and included a customer name, email address, and local telephone number. Pied Piper then evaluated the speed and quality of dealership responses by email, telephone, text message and chat over the next 24 hours. ILE evaluation of a dealership consists of over 20 differently weighted measurements, based upon best practices that are mathematically most likely to generate sales, which combine to generate an overall ILE score ranging from 0 to 100.

### **Subaru Ranked Highest for the First Time: How Did It Happen?**

2025 marks the first year Subaru achieved the top ranking in an ILE industry study. The Subaru brand performance improved by nine points for 2025, reaching an average ILE score of 77, the new highest auto brand ILE score to date. Subaru dealers this year were much more likely to reach out to website customers through multiple communication paths, doing so 71% of the time on average, compared to 49% of the time for the overall industry. Subaru dealers were also much less likely to score below 40 – failing to personally respond to website customers – only 8% of the time on average, compared to 19% of the time for the industry overall.

### **How Did Industry Performance Change Over the Past Year?**

The overall auto industry average ILE performance increased three points to 65, the highest average to date. Acura, Hyundai, Subaru, Lincoln and Fiat were the brands with the largest improvement compared to last year, each improving their ILE average score by nine or more points. Looking at the past five years, the auto industry has maintained a steady upward trend in performance. For example, in the 2025 study, 28 brands achieved ILE scores of 60 or higher, compared to only eight meeting the same benchmark in 2021.

### **Behaviors that improved:**

The average dealer achieved a net improvement in measured behaviors this year, including the following: Dealers responded to a customer through multiple paths (email, phone, text) 49% of the time on average in 2025, up from 44% of the time last year. Dealers this year were also more likely to answer a customer's question by email or text: 69% of the time on average vs. 59% of the time last year. Email responses in the 2025 study were also more likely to suggest next steps (73% vs. 67%) and give compelling reasons to buy from their particular dealership (27% vs 22%). Overall, dealers this year were more likely to answer customers' questions and on average did so in less time.

### **Behaviors in decline:**

While many key dealer behaviors improved in the 2025 study, some measurements declined: The rate of texting a customer dropped from 70% in 2024 down to 64% this year, however, this drop was offset by a marginally higher rate of texts answering the customer's question (38% this year vs 34% last year). The rate of dealers phoning a web customer experienced a small drop from 68% of the time on average in 2024 to 66% of the time this year.

### **What is the “80/40 Rule” and Why is it So Important?**

Each brand's industry study ILE score represents an average that includes top-performing dealers as well as poor performers, each with a score ranging from 0-100. In the 2025 auto dealer study, 40% of all dealerships measured scored above 80 (providing a quick and thorough personal response), while 19% of dealerships scored below 40 (failing to personally respond to their website customers). The “over 80” and “under 40” segments shifted +6% and -2% respectively since last year. Cameron O'Hagan, Pied Piper's Vice President of Metrics and Analytics said, “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.”

### **What is the Auto Industry's Greatest Opportunity for Improvement?**

The behavior mathematically most likely to boost auto sales is embracing a multi-channel communication strategy instead of responding to customers using only email, only phone, or only text. Many customers miss emails, ignore calls, or get overwhelmed by texts. Most auto dealers today reliably respond through at least one channel, but the next step is to master communication through multiple paths to improve their chances of reaching customers. Once contact is established, they should adopt the method chosen by the customer for future interactions. In this year's study, 85% of dealers responded to a customer through at least one path, while only 49% used multiple paths. “A consistent multi-prong response to every customer is critical,” said O'Hagan. “You never know in advance which communication method will be most effective at reaching a specific customer.”

### **2025 Brand Performance Compared:**

Response to customer web inquiries in 2025 had large variation by brand, as shown by these examples:

- **“Answered Question”** - How often did the brand's dealerships email or text an answer to a website customer's question within 60 minutes?
  - **More than 70%** of the time on average: Subaru, Infiniti, Porsche
  - **Less than 50%** of the time on average: GMC, Buick, Mitsubishi, Jaguar, Polestar, Lucid
  
- **“Phoned Customer”** - How often did the brand's dealerships respond by phone to a website customer's inquiry within 60 minutes?
  - **More than 60%** of the time on average: Subaru, Infiniti, Honda, Lincoln
  - **Less than 45%** of the time on average: Dodge, Chevrolet, Mitsubishi, Jaguar, Chrysler, Polestar, Lucid
  
- **“Offered an Appointment”** - How often did the brand's dealerships offer to set an appointment for specific date/time?
  - **More than 45%** of the time on average: Infiniti, Subaru, BMW
  - **Less than 25%** of the time on average: Chrysler, Lexus, Jaguar, Alfa Romeo, Polestar, Lucid

- **“Did Both Fast”** - How often did the brand’s dealerships email or text an answer to a website customer’s question and also phone the customer all within 15 minutes?
  - **More than 30%** of the time on average: Subaru, Infiniti, Ford, Honda
  - **Less than 15%** of the time on average: Jaguar, Porsche, Polestar, Lucid
  
- **“Failed to Respond”** - How often did the website customer fail to receive a personal response of any type?
  - **Less than 10%** of the time on average: Toyota, Infiniti, Volvo, Subaru, BMW, Porsche, Audi
  - **More than 25%** of the time on average: Mercedes-Benz, Buick, Jaguar, Lucid, Polestar

“We all agree that customers today visit dealer websites first, and how dealers respond to those customers drives today’s sales success,” said O’Hagan. “The trouble is that website customers can be invisible in day-to-day operations which makes them too easy to overlook.” Pied Piper has found that the key to driving improvement in website response is showing dealers what their website customers are really experiencing – which is often a surprise.

### **About Pied Piper Management Company, LLC**

Monterey, California, based Pied Piper helps brands and national retailer groups improve the omnichannel sales & service performance of their retailers.

Pied Piper’s Prospect Satisfaction Index® (PSI®) process applies data science analytics to determine the omnichannel sales and service best practices most likely to drive unit sales and loyalty. PSI then uses a combination of artificial intelligence, machine learning and human actors to measure and report how effectively retail locations follow those best practices.

Clients order ongoing PSI measurement and reporting – internet, telephone or in-person – as tools to improve and maintain the omnichannel sales and service effectiveness of their retailers. Through Pied Piper’s industry studies, clients also learn how their performance compares to others within their industry, as well as to other industries.

Examples of other recent Pied Piper PSI studies include the 2024 Service Telephone Effectiveness® (STE®) Auto Industry Study (Honda’s Acura brand was ranked first), the and the 2024 Internet Lead Effectiveness (ILE®) Auto Dealer Group Study (Napleton Automotive was ranked first.)

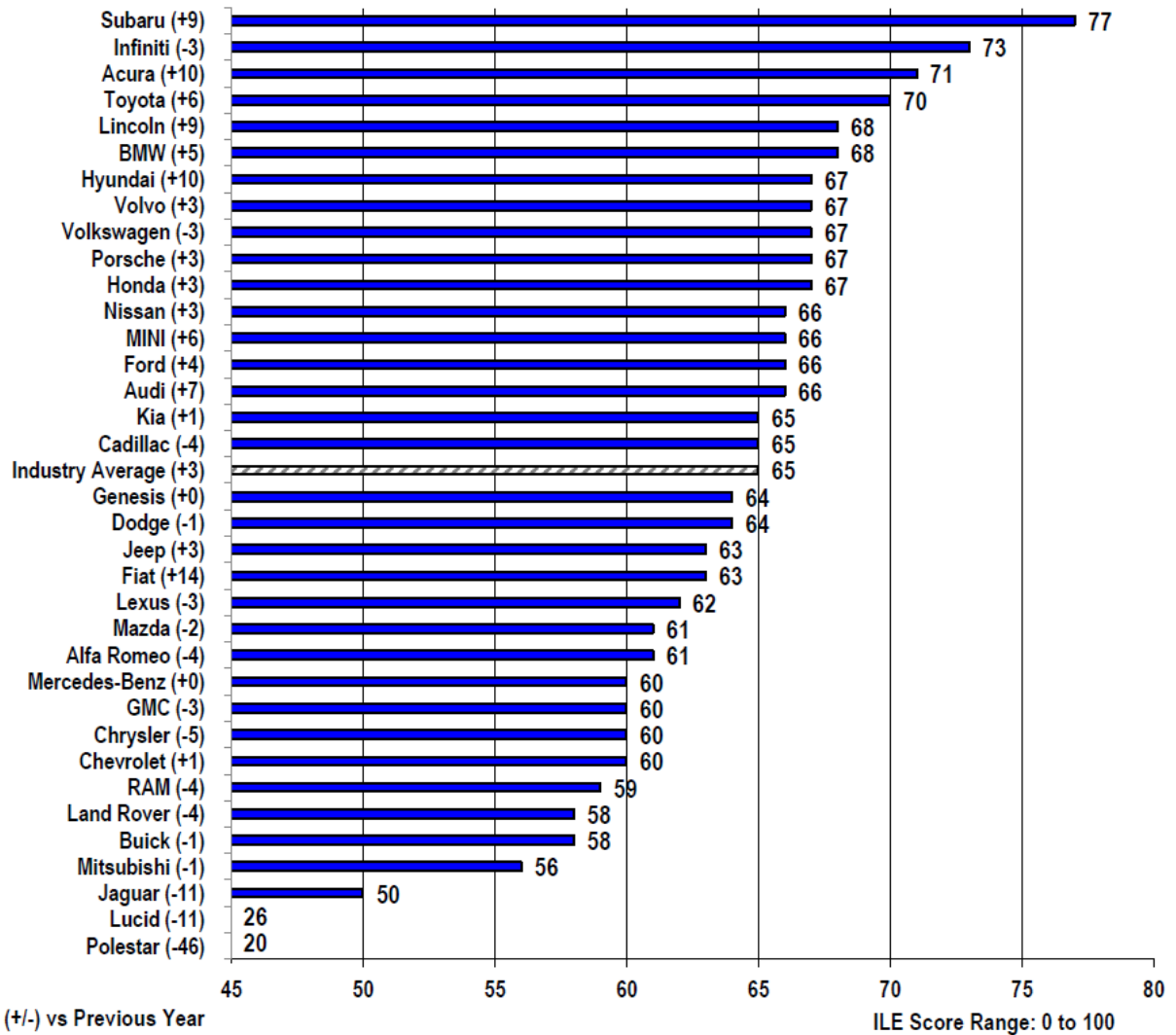
For more information about Prospect Satisfaction Index® study results or to apply ongoing PSI measurement and reporting to improve performance, go to [www.piedpiperpsi.com](http://www.piedpiperpsi.com).

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## 2025 Pied Piper Prospect Satisfaction Index® Auto Brands Ranked by PSI® - Internet Lead Effectiveness® Score

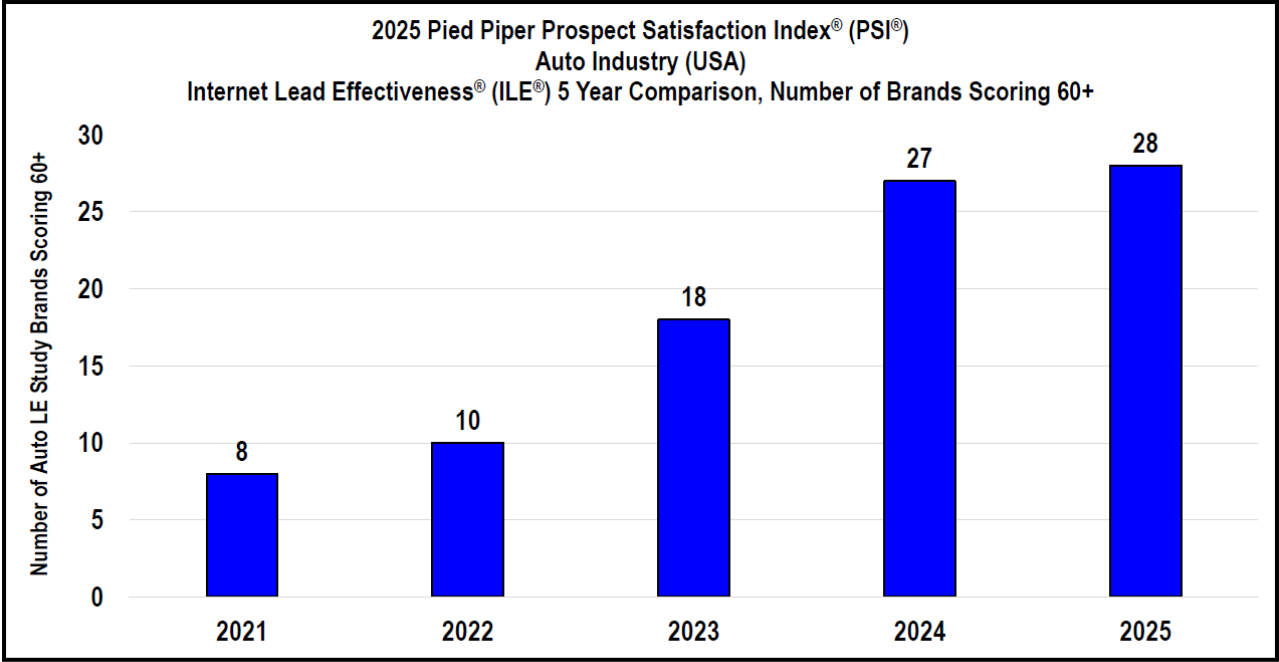


Source: 2025 Pied Piper Auto Internet Lead Effectiveness Industry Study (USA)

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**Pied Piper Prospect Satisfaction Index® (PSI®)**  
**Auto Industry (USA)**  
**Internet Lead Effectiveness® (ILE®) Scores 2021 through 2025**

Auto ILE Score Comparison	ILE Score						
Brand	2025	2024	2023	2022	2021	Change 2024 to 2025	Change 2021 to 2025
Subaru	77	68	66	61	67	13%	15%
Infiniti	73	76	69	67	71	-4%	3%
Acura	71	61	63	60	65	16%	9%
Toyota	70	64	64	60	58	9%	21%
BMW	68	63	61	60	62	8%	10%
Lincoln	68	59	57	50	50	15%	36%
Volkswagen	67	70	67	59	56	-4%	20%
Honda	67	64	55	51	54	5%	24%
Porsche	67	64	63	57	59	5%	14%
Volvo	67	64	64	60	62	5%	8%
Hyundai	67	57	59	51	54	18%	24%
Nissan	66	63	59	58	55	5%	20%
Ford	66	62	58	48	48	6%	38%
MINI	66	60	59	50	59	10%	12%
Audi	66	59	57	55	55	12%	20%
Cadillac	65	69	72	65	56	-6%	16%
Kia	65	64	55	56	54	2%	20%
Dodge	64	65	56	56	51	-2%	25%
Genesis	64	64	55	51	48	0%	33%
Jeep	63	60	57	53	54	5%	17%
Fiat	63	49	54	47	55	29%	15%
Lexus	62	65	62	63	58	-5%	7%
Alfa Romeo	61	65	62	59	56	-6%	9%
Mazda	61	63	60	61	60	-3%	2%
Chrysler	60	65	63	60	56	-8%	7%
GMC	60	63	60	54	50	-5%	20%
Mercedes-Benz	60	60	57	57	59	0%	2%
Chevrolet	60	59	60	56	50	2%	20%
Ram	59	63	57	54	54	-6%	9%
Land Rover	58	62	61	54	59	-6%	-2%
Buick	58	59	56	49	51	-2%	14%
Mitsubishi	56	57	55	50	53	-2%	6%
Jaguar	50	61	63	55	55	-18%	-9%
Lucid	26	37	30	30	N/A	-30%	N/A
Polestar	20	66	62	13	N/A	-70%	N/A
<b>INDUSTRY</b>	<b>65</b>	<b>62</b>	<b>58</b>	<b>55</b>	<b>55</b>	<b>5%</b>	<b>18%</b>



Source: 2025 Pied Piper Auto Industry Internet Lead Effectiveness Study (USA) [www.piedpiperpsi.com](http://www.piedpiperpsi.com)