

Brand Survey 2022

**Global results +
construction sector review**



Q2/2022



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PART 1:

Introduction

**LECTURA: facilitator
in the equipment
industry that turns
your data into value**

For almost 40 years,

LECTURA has been redefining the concepts of digital visibility and performance in the heavy equipment industry

in Europe and the rest of the world by providing companies with comprehensive machinery data to support their purchase decisions.

Every month,

1,200,000
visitors

search, find, and use valuable intelligent information from our wide database of over

160,000

machinery and equipment specifications and technical details.

LECTURA Surveys offers heavy machinery industry professionals and other B2C online customers in the industry the opportunity to get clear insights from B2B and end customers that help them adjust their business strategies according to the market reality. They are the fastest and most effective research tools to gather useful information about the characteristics, opinions, experience and needs of the people within the industry, and to get a better understanding of their behavior. In short, LECTURA Surveys are offering access to a unique audience of professionals and help companies transform valid market data into value that will allow them to grow their business.



The success of any business depends on its brand identity:



How it is created and maintained by the company, and how it is perceived over time by the customers through the set of elements that differentiates it from the competition. The brand is, basically, the mirror of a business. Without a good brand identity, customers will have a hard time trusting the business, and staying loyal to it.

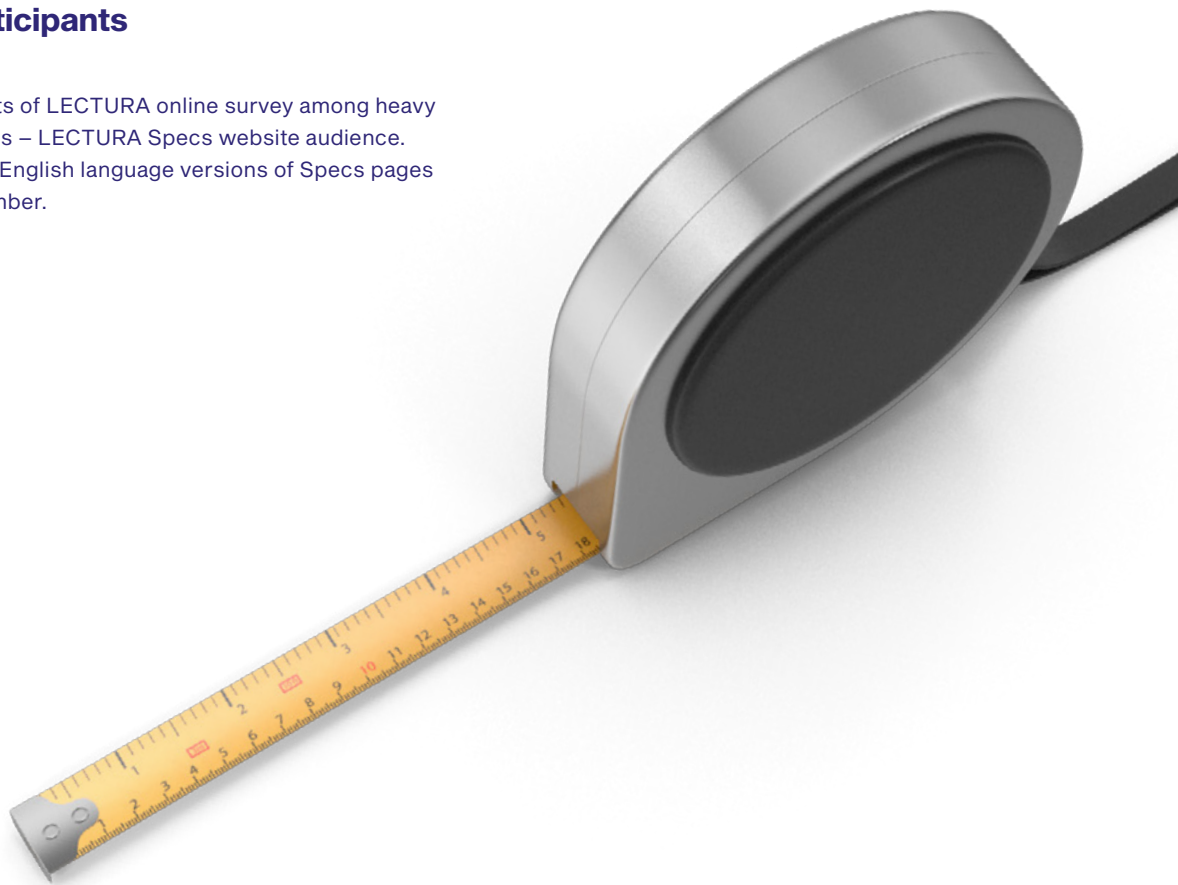
Anyone would probably be able to name a few brands from, for example, the automotive or fashion industries that he or she perceives as a premium brand – and there is a great possibility that they would be true based on many rankings, studies, whitepapers, public opinions, historical achievements, brand visibility through various sponsorships or other impactful activities. But what about the heavy equipment sector? There is no such complex study or report that would outline the brand awareness of appropriate manufacturers, mostly because of a limited contact between manufacturers and end customers.

Unfortunately, brands from the construction machinery industry in particular, lack the tools to measure client perception and satisfaction, which creates difficulties when it comes to adjusting their business strategies, in order to achieve better results.

Knowing that, we decided to do a favour for the industry and come forward with one of our biggest and most important market research projects: LECTURA BrandSurvey.

Methodology and Participants

The report is based on the results of LECTURA online survey among heavy equipment industry professionals – LECTURA Specs website audience. The survey was available on the English language versions of Specs pages from 8th September to 15th November.



52,644
respondents from all around the world
reviewing 892 participated in the survey
brands.

From these,

92 most frequently
reviewed brands
were selected

to serve as the basis for the current
paper as well as brand-tailored
individual reports.

From brand perception to media visibility, LECTURA BrandSurvey redirects the attention of the audience right at the core of a business: its identity.

Through a set of 14 questions, we wanted to find out how customers from all around the world see heavy machinery manufacturers, what are the things that matter the most to them, how these brands chose to interact with their clients and what do they need to improve in order to maintain the trust of their current customers and gain that of new ones.

Besides creating a communication bridge between the most important players in the machinery industry (brands and their clients),

LECTURA BrandSurvey is a winning market research tool for both



The audience:

The participants had the unique opportunity to communicate, based on their personal customer experience, things that normally are not possible in a real-life situation: how they truly see brands, what they like and what they do not like about a certain brand, how they see the competition, how pleased they are of the brands dealers' network, etc.

The brands:

Have the chance to receive a clear, honest, comprehensive view about their brand awareness (how well they are advertised, if their communications strategies pay off in terms of media visibility, how often they interact with the audience and how, etc). Basically, the chance to find out and use in their own interest information that usually cannot be collected and interpreted at such a high scale elsewhere.

Most importantly, the valuable market data collected through LECTURA BrandSurvey can be transformed into better business strategies for the brands involved in it. Better business strategies will enable better decisions. And better business decisions will turn into better revenues. And that leads to growth.

Executive summary

In the following paragraphs, the general results are described to **outline how, in general, the brands were evaluated.** In addition, the dealership network, media visibility and from which sources people can draw information about brands are evaluated.

52,644 reviews of 892 brands

(Construction, Agriculture, Material Handling, Transportation)

Survey sections:

General brand evaluation

Products and services

Media visibility

92 most frequently reviewed brands (42,202 reviews in total)

Online presentation

Dealership network

Competitors

(Specific sample sizes for each question may vary)

Respondents from all around the world

Europe (N = 16236):

Åland	3
Albania	90
Andorra	1
Austria	79
Belarus	25
Belgium	283
Bosnia and Herzegovina	90
Bulgaria	232
Croatia	420
Cyprus	76
Czechia	176
Denmark	600
Estonia	122
Faroe Islands	15
Finland	637
France	184
Germany	281
Greece	363
Guernsey	6
Hungary	377
Iceland	86
Ireland	1138
Isle of Man	14
Italy	162
Jersey	11
Kosovo	31
Latvia	153
Lichtenstein	1
Lithuania	218
Luxembourg	21
Macedonia	40
Malta	8
Moldova	30
Monaco	1
Montenegro	26
Netherlands	510

Norway	995
Poland	129
Portugal	420
Romania	746
Serbia	288
Slovakia	177
Slovenia	312
Spain	120
Svalbard and Jan Mayen	1
Sweden	1167
Switzerland	62
Ukraine	65
United Kingdom	5156

Asia (N = 5398):

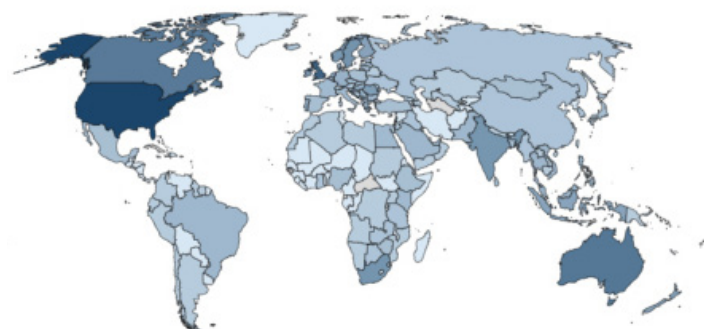
Afghanistan	17
Armenia	9
Azerbaijan	37
Bahrain	15
Bangladesh	114
Bhutan	6
Brunei	9
Cambodia	37
China	73
Georgia	45
Hong Kong	111
India	1086
Indonesia	612
Iran	2
Iraq	79
Israel	102
Japan	121
Jordan	34
Kazakhstan	24
Kuwait	40
Kyrgyzstan	5
Laos	41

Lebanon	39
Macao	4
Malaysia	263
Maldives	13
Mongolia	124
Myanmar (Burma)	65
Nepal	29
North Korea	1
Oman	52
Pakistan	213
Palestine	20
Philippines	286
Qatar	95
Russia	98
Saudi Arabia	206
Singapore	148
South Korea	89
Sri Lanka	120
Syria	1
Taiwan	68
Tajikistan	2
Thailand	208
Turkey	119
United Arab Emirates	258
Uzbekistan	27
Vietnam	206
Yemen	25

Africa (N = 2826):

Algeria	45
Angola	42
Benin	3
Botswana	66
Burkina Faso	8
Burundi	9
Cameroon	12
Cape Verde	3
Central African Republic	1

Chad	2
Congo	30
Djibouti	8
Egypt	185
Eritrea	4
Ethiopia	118
Gabon	10
Gambia	1
Ghana	77
Ivory Coast	13
Kenya	184
Lesotho	15
Liberia	8
Libya	42
Madagascar	12
Malawi	5
Mali	8
Mauritania	11
Mauritius	31
Mayotte	1
Morocco	31
Mozambique	48
Namibia	49
Niger	1
Nigeria	136
Republic of the Congo	2
Rwanda	5
Reunion	4
Senegal	5
Sierra Leone	16
Somalia	14
South Africa	1125
South Sudan	7
Sudan	36
Swaziland	22
Tanzania	101
Togo	1



Tunisia	13
Uganda	40
Zambia	75
Zimbabwe	127

North America (N = 13456):

Anquilla	3
Antigua and Barbuda	2
Aruba	3
Bahamas	15
Barbados	20
Belize	12
Bermuda	4
Bonaire	4
British Virgin Islands	1
Canada	2715
Cayman Islands	2
Costa Rica	20
Curacao	6
Dominica	2

Dominican Republic	20
El Salvador	7
Greenland	10
Grenada	1
Guadeloupe	2
Guatemala	21
Haiti	4
Honduras	12
Jamaica	37
Martinique	1
Mexico	120
Nicaragua	4
Panama	14
Puerto Rico	29
Saint Kitts and Nevis	2
Saint Lucia	12
Saint Martin	1
Saint Vincent and the Grenadines	2
Trinidad and Tobago	30

Turks and Caicos Island	2
U.S. Virgin Islands	1
United States	10309

Oceania (N = 3773):

American Samoa	10
Australia	2994
Cook Islands	3
Fiji	18
French Polynesia	9
Guam	15
Kiribati	1
Micronesia	1
New Caledonia	5
New Zealand	672
Norfolk Island	1
Northern Mariana Island	1
Palau	1
Papua New Guinea	36

Samoa	2
Salomon Islands	1
Tokelau	1
Wallis and Futuna	1

South America (N = 528):

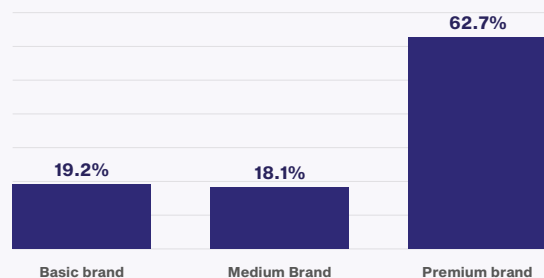
Argentina	46
Bolivia	8
Brazil	226
Chile	34
Colombia	52
Ecuador	23
Falkland Islands	1
French Guiana	1
Guyana	26
Paraguay	7
Peru	38
Suriname	38
Uruguay	14
Venezuela	16

1 How do you consider this brand to be in general?

The worldwide data indicate regardless of the specialization of the brand people tend to review the brands **rather positively**. On a scale from 1 as the basic level to 5 as the premium level, the mean value 3.6 represents people perceiving the brand quality more than standard.

Simply 5 from 10 survey respondents rated the brand as of **premium quality**. On the contrary, only two from 10 people rate the brand as of a basic quality speaking for a general satisfaction with evaluated brands.

Average brand evaluation



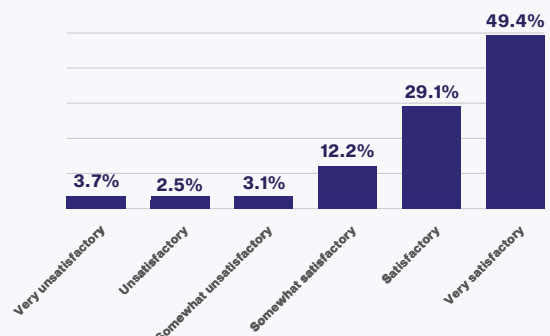
2 How would you rate this brand's dealership network in your country?

Brand quality is affected by many factors - the quality of the products, availability and accessibility of additional services, like spare parts supply or dealership network.

These days brands have many options for getting products to customers. An option used by many manufacturers is a dealer or distributor network to do the selling for them. Dealers and distributors provide that personal relationship that builds loyal customers and, ultimately, increases sales.

In this survey, **87.9% of respondents are satisfied** with a dealership network of the evaluated brand in their country.

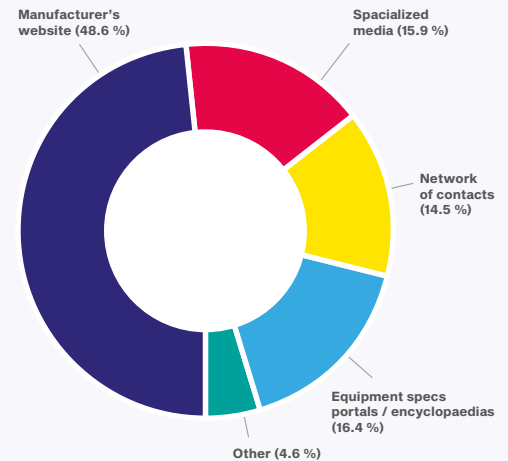
Average satisfaction



3

Where do you mostly look for information about this brand and its products/services?

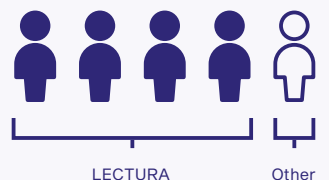
On the one hand, the media serves as a source of information about brands, but not the only one. In this survey, only 15.9% claimed they prefer media; the rest would go for another source. Especially **manufacturers' websites are of high popularity** and the number one choice of almost half of the respondents (48.6%). Equipment specs portals as the second most preferred information source were selected by 16.9%, followed by a network of contacts (14.5%), referring to the reliance on other people's references and experience.



4

Which one? (Specialized media + Equipment specs portals/encyclopaedias)

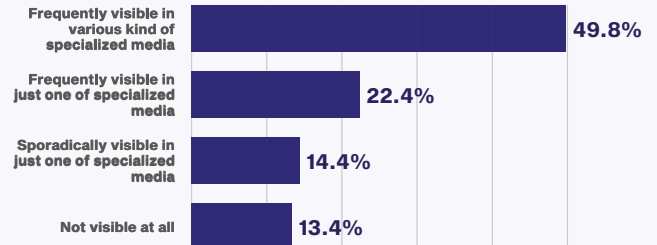
As follows from the text above, about a third of people would look for information in equipment specs portals or in specialized media. **We are pleased the survey results show 4 from 5 people would choose LECTURA.**



5

How do you consider this brand to be visible in the media?

Visibility is the cheat sheet to brand success. The public needs to know the brand exists before they can ever consider buying its products. Successful brands today have to master using both traditional and digital media as well as various kinds.



Despite this, almost 20% of the survey respondents have not noticed the brand they were evaluating in any kind of specialized media – and on the contrary, the integrated marketing (referring to the visibility of the brand in many kinds of

media) appears to be **mastered in circa 40% only**. Does it mean the brands have to invest more in increasing their visibility? Or are the respondents just oblivious to the media presentation of the brands?

Global results: Construction & Lifting

In this chapter, the most interesting findings of the construction & lifting equipment manufacturers are summarized.

Based on **24,971 reviews of 48 brands** from respondents from 209 countries from all around the world, the data may bring us valuable insights on how people within the industry perceive not only the quality of manufacturers products and related services but also on how are these subject to able interact with their (potential customers) via media and other information channels.

1

How do you consider this brand to be in general?

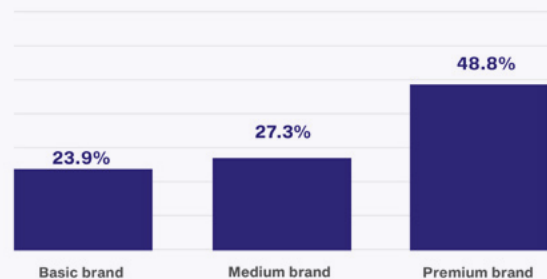
In general, construction and lifting equipment manufacturers are perceived rather positively. Almost **50%** of respondents evaluated the brand they were rating as a brand of **premium quality**. About a third think construction and lifting manufacturers would need to improve to some extent – thus, review the brand to be on a level of a medium quality. Only about **23%** claimed the brand they were evaluating should be rated as a **basic**.

On average, on a scale from 1 to 5 (1: basic brand – 5: premium brand), the **construction and lifting equipment manufacturers receive the rating of 3.52**, which again confirms such brands are better perceived positively, leading to the fact they are able to both, provide the customers with products and services of high quality and at the same time leave a positive impression/feeling from the brand presentation.

Speaking about particular brands, in the construction and lifting sector, there are **top 5 brands that far exceed the average**. Such best performing brands were the following: **Liebherr: M = 3.94; Caterpillar: M = 3.87; John Deere Construction: M = 3.84; Kubota: M = 3.74; Volvo: M = 3.70**. All these brands have in common that more than 50% claimed these brands are of premium quality.

Such high ratings are explained by the replies to the following questions.

Average brand evaluation



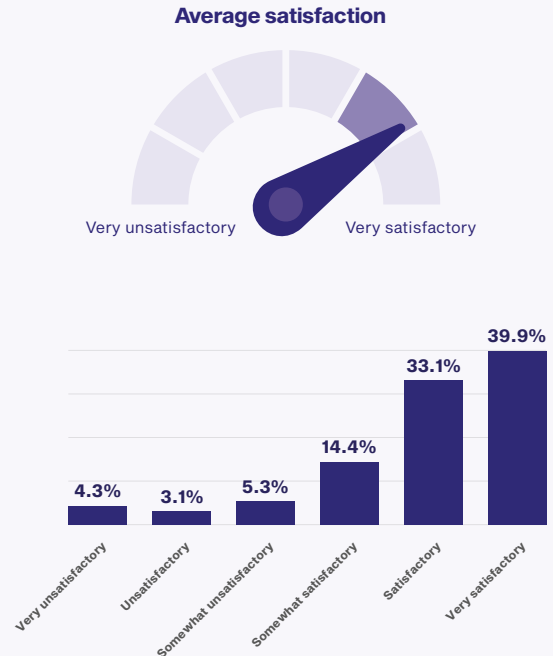
①	Liebherr	3.94 out of 5
②	Caterpillar	3.87 out of 5
③	John Deere Construction	3.84 out of 5
④	Kubota	3.74 out of 5
⑤	Volvo	3.70 out of 5

2

How would you rate this brand's dealership network in your country?

It is usually up to dealers to engage with the customers. Thus, dealers especially take a considerable part in creating opinions about the brand and affecting the perception of the manufacturer. The way the dealer communicates with the customers is one thing. On the other hand, people are more concerned about factors like the availability and accessibility of dealers' services.

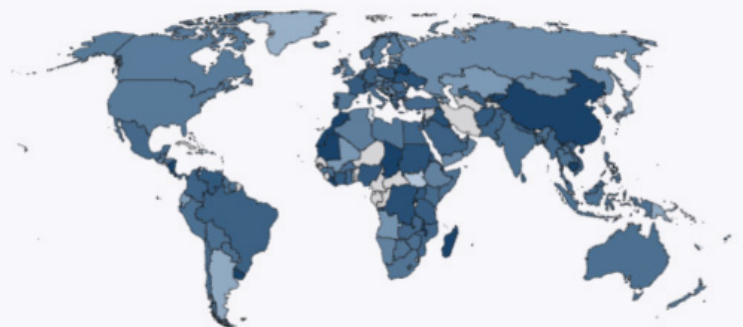
In the construction and lifting industry, **87.4% of respondents are to some extent satisfied** with a dealership network in their country. Actually, **39.9% would even rate the dealership network as very satisfactory**. On a scale from 1 to 6 (1: very unsatisfactory – 6: very satisfactory), **the average is 4.88**. This indicates there are only a few people that have a negative experience with the dealers in their country.



On a level of specific brands, the brand with the best dealership network are **Atlas: M = 5.61; Avant Tecno: M = 5.42; Bell: M = 5.34; Bobcat: M = 5.33; Bomag: M = 5.29**. Interestingly none of the top 5 brands in the previous rank appeared in this rank. On the other hand, it could be explained by the fact that for global brands it might be difficult to maintain the quality of dealership networks in all countries (compared to brands that better focus on operating in specific regions only).

Regarding specific regions and countries, the most satisfied respondents come from Europe (Belarus, Ukraine, Poland; but also Portugal and France), China and partially also Latin America (Uruguay, Brazil, Venezuela, Costa Rica) and Africa (Madagascar, Mauritania, Chad). On the other hand, in Europe, the improvement would be appreciated in Czechia and Slovenia. Also, in Russia, Kazakhstan, Japan, and Argentina, construction brands need to densify their dealership network.

1	Atlas	5.61 out of 6
2	Avant Tecno	5.42 out of 6
3	Bell	5.34 out of 6
4	Bobcat	5.33 out of 6
5	Bomag	5.29 out of 6



3

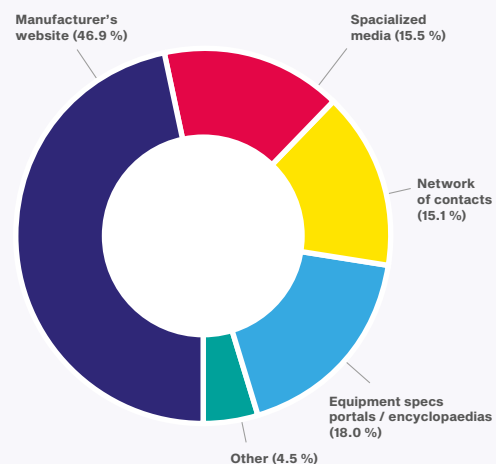
Where do you mostly look for information about this brand and its products/services?

There is a growing tendency to rely on websites when looking for information, with no exception when it comes to searching for information about construction and lifting equipment manufacturers. **According to 46.9% of respondents, the websites serve as the primary source.** Probably, because of frequent updates that prevent the information on the websites from becoming obsolete.

The second most popular source of data is **equipment specs portals/encyclopaedias, chosen by 18 %** of survey participants. On the contrary to manufacturer's websites, these usually summarize information about various brands, including specs information as well as comparison of similar products of different brands.

About the same percentage of respondents state they search for information about construction and lifting brands in specialized media and via their **network of contacts**, respectively. Such results reveal that although

digital media, magazines, etc., make a considerable impression, they do not usually serve as the primary source when looking for construction & lifting related information.

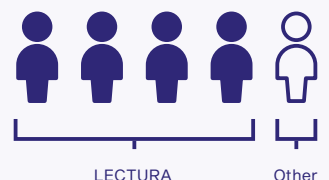


4

Which one? (Specialized media + Equipment specs portals/encyclopaedias)

Since LECTURA aims to provide its audience with both a comprehensive encyclopedia with various models' specs as well as with up to date press releases, reports and magazines, it is a pleasant surprise how many people consider it as their primary source. In the case of construction, **79.3% of people prefer**

LECTURA over other such channels. Actually, if we imagine 5 people browsing through the internet looking for a reliable and up-to-date specs portal, **four of the five choose LECTURA.**

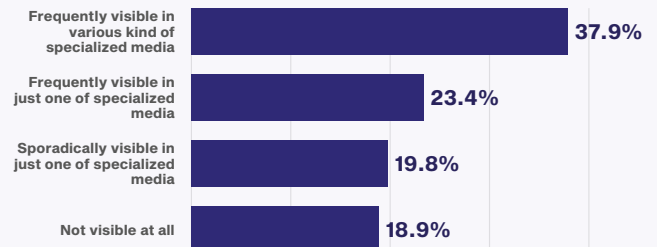


5

How do you consider this brand to be visible in the media?

Almost **40% of respondents** consider construction and lifting equipment manufacturers to be **frequently visible in various kinds of social media**. There is no doubt that construction and lifting, as the leading sector in the heavy machinery industry, consider visibility among media as being of high importance. About 20% of respondents claim it is either frequently visible in just one specialized media or at least sporadically visible in just one specialized media.

Even though **81.1% of surveyees claim they are to some extent aware** of construction and lifting equipment manufacturers' content in media, there is still **18.9% of people who do not think so**. Why is it so? Did not some companies identify any of the potential target groups? Do they prefer a kind of media where some people are not used to searching for information? Since these numbers represent the average for the entire construction and lifting sector, there is evidence some brands would need to improve their (promotion) strategy.



[Brand]

Of the total 52,644 replies received in LECTURA online survey from 8th September to 15th November, **[Brand] received 817 reviews from 95 countries from all around the world.** Most replies were received from the United Kingdom, followed by the United States in second place and Australia.

[Brand]

1 How do you consider this brand to be in general?

Over a half of the survey participants, **51.2%, consider [Brand] to be a premium** (top tier) brand. Medium brand rating was the choice for 25.2% of people. Nevertheless, **23.6% of the survey respondents stated that the manufacturer is rather a basic brand.** On a 5-point scale, **the average rating equals 3.55 points.**

The regional results of the brand rating reveal very interesting findings. The highest percentage of respondents who marked [Brand] as

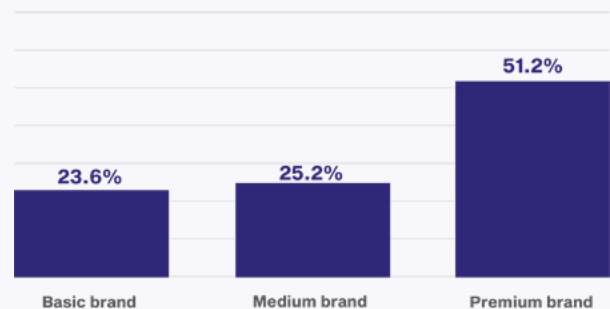
the premium brand come from **South America: over 72.7%** of people.

The region of the company's origin, shows that over 43% of surveyees described [Brand] as the premium brand. On the other hand, almost 39% of respondents claimed that the manufacturer is a basic brand, **outlining high expectations and demands from the Asian customers.**

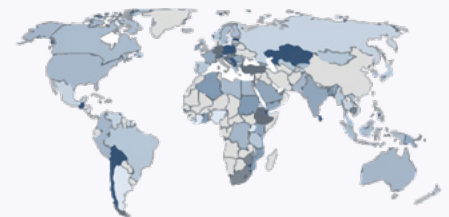
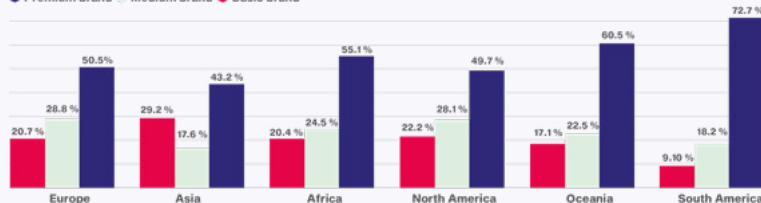
The **demographic diversity of the most satisfied visitors** confirms the popularity of the brand throughout

the world as the users come from Germany, Poland, Czechia, Serbia, Kazakhstan, Chile or e.g. Guatemala.

Average brand evaluation



● Premium brand ● Medium brand ● Basic brand



[Brand]

2 How would you rate this brand's dealership network in your country?

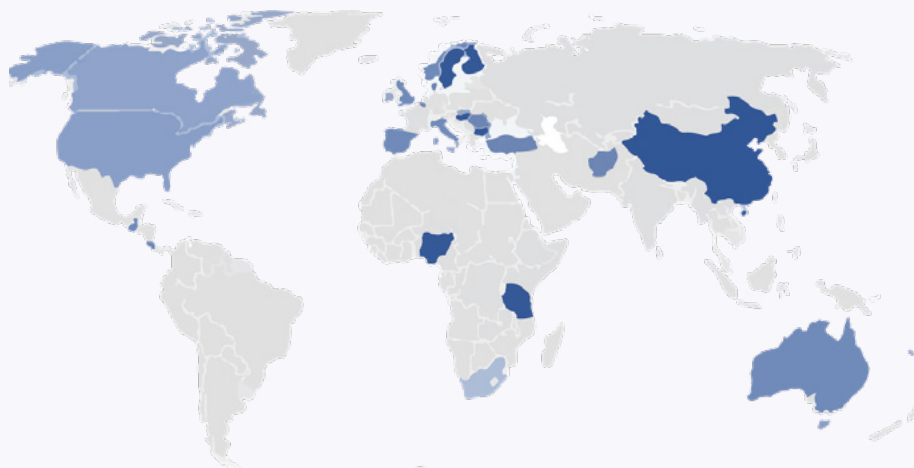
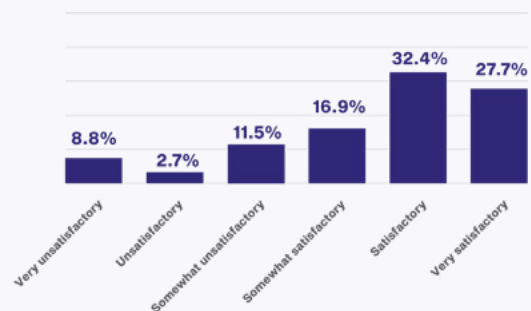
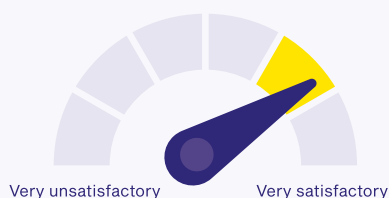
According to the results, people perceive [Brand] as a brand with a quite strong dealership network as almost **77% of respondents** rated the manufacturer's dealership network **somewhat satisfactory or better**. Moreover, almost **28% of survey participants gave the highest possible ranking** - very satisfactory. Another 32.4% of people see the brand having

a satisfactory network of dealers in their country. On the other hand, 8.8% of customers would appreciate a massive expansion of the dealer network as they selected a very unsatisfactory rating.

Regarding specific countries and regions, the most satisfied customers come from Scandinavian countries

(Finland, Sweden), China, Australia, Hungary, Bulgaria, Tanzania or Nigeria.

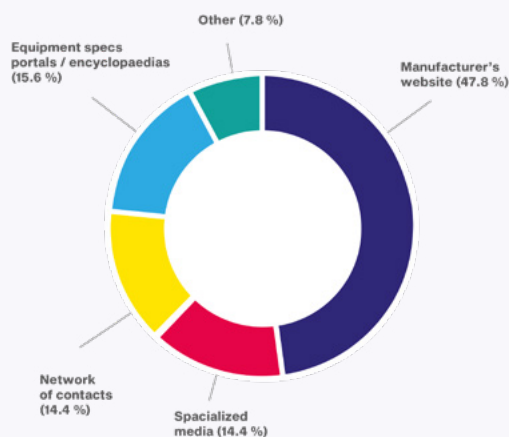
Dealership network satisfaction



[Brand]

3 Where do you mostly look for information about this brand and its products/services?

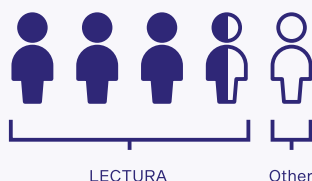
Almost a half of the survey respondents **(47.8%) tend to look up information about the construction company directly on the manufacturer's website**. This finding outlines that the visitors of [Brand] machines appreciate the value of the original content from the OEM. Equal number of surveyees (14.4%) either regularly check specialized media or use their network of contacts. Up to 15.6% of survey respondents favor equipment specs portals and encyclopedias. All in all, **the most important source of information about [Brand] remains the manufacturer's website**, although people also use alternative sources of information about [Brand] such as specs portals, specialized media or networks of contacts.



4 Which one? (Specialized media + Equipment specs portals/encyclopaedias)

Following on from the previous question, the survey questionnaire required to specify what kind of specialized media or equipment specs portals do the users prefer. We are proud to confirm that **70.8% of them chose LECTURA**. Our vast database with machinery specifications attracts over 1.2 million professionals from the industry every month.

In other words, roughly **7 out of 10 people prefer LECTURA prior to any other specs portal/specialized media**.

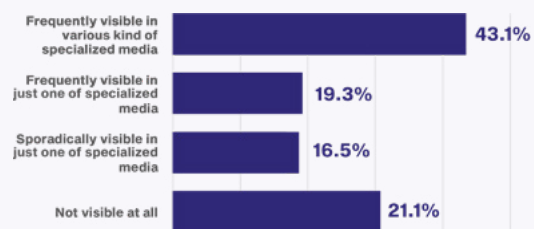


[Brand]

5 How do you consider this brand to be visible in the media?

The evaluation of results reveals that [Brand] is overall quite visible in the media. Over **43% of surveyees claimed that [Brand] is frequently visible in various kinds of specialized media**. Secondly, 19.3% of participants stated that the construction manufacturer is frequently visible in just one specialized media, acknowledging that the advertisements are rather easy to spot. The above mentioned facts confirm that [Brand] **invests a lot of resources to attract readers** of various specialized media from the industry. Moreover, 16.5% of surveyees marked [Brand] as sporadically visible in just one specialized media that may be affected by regional differences and possibilities. It is quite surprising that **over 21% of people marked [Brand] as a non-visible company** in specialized media, which is potentially a high number:

1 out of 5 readers has not seen any advertisements from the construction OEM in the previous months, confirming that [Brand] could be spending more resources or invest into different regions and markets in order to bring more visibility for the brand.



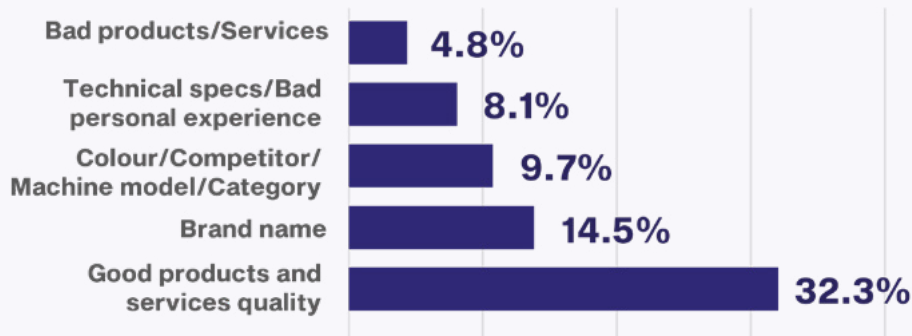
6 What machine type (category/class/model) do you consider to be the best product of this brand?

heavy machinery OEM. The [Model] mini excavator was chosen as the most popular compact model. In the wheel loader category, the [Model] was the top rated machine. Last but not least, the [Model] and [Model] crawler cranes were selected as the best products representing the lifting sector.



- 1 Crawler excavators
- 2 Mini excavators
- 3 Wheel loaders
- 4 Wheel excavators
- 5 Crawler cranes – Lattice boom

7 When you think of the brand, what comes to mind first?



8 What other brand do you consider the most similar to the brand you are currently evaluating considering both the products portfolio and client's approach?

Respondents from Americas and Oceania favour Caterpillar over Komatsu as the most similar brands. The situation is completely different in the European region: The results are very levelled as 5 manufacturers reached the same amount of votes (Case, Kubota, New Holland, Volvo and Caterpillar). To sum up, the results stress out the importance of the local market for any manufacturer, not only because of the wide client base, but also due to brand awareness.



- 1 Komatsu
- 2 Caterpillar
- 3 Kobelco
- 4 Doosan
- 5 None

[Brand]

9 Is there any brand providing the same/similar kind of service/product you would rate better than the brand you are currently evaluating?

The majority of survey participants, **71.4%, are satisfied with [Brand] and its products and see no brand with a better service or product.** In other words, more than 7 people out of 10 think [Brand] has the best model in the evaluated heavy machinery category on LECTURA Specs. **On the other hand, the remaining 28.6% believe that there is a better brand**

than the construction manufacturer and offered their feedback on what should be improved. **Personal preference, larger product portfolio, outdated features and worse models compared to the competition** were the most frequently mentioned issues seen by survey respondents. The overview of the feedback including specific brands is shown in the graphics.

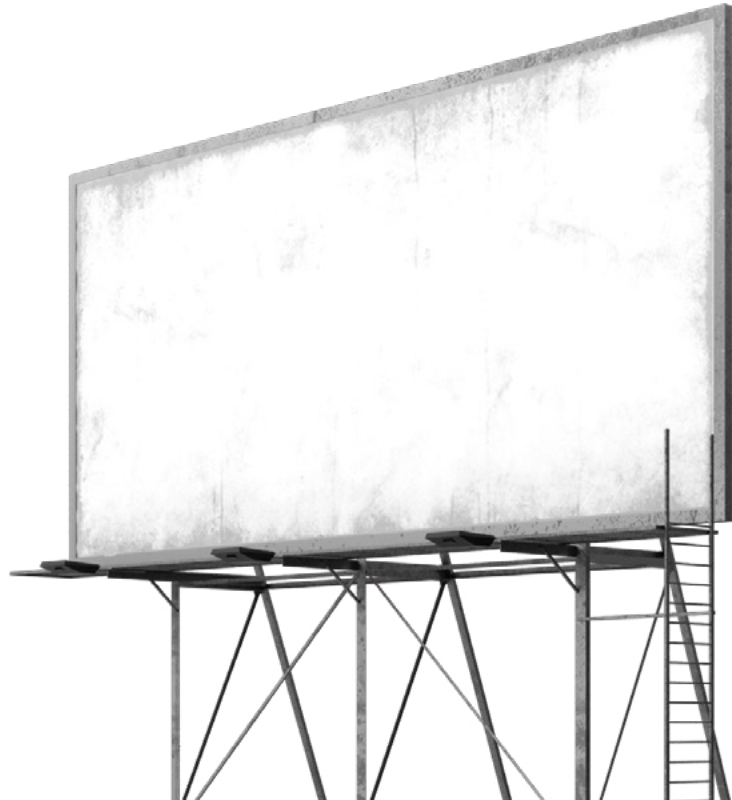


Why do you prefer the brand over [Brand]?

[Brand]
Cat is more durable
Better products and customer support
In general, better excavators
[Brand]
Spare parts
Overall better
[Brand]
Customer relationships personnel are better
Larger company
Larger portfolio of products
Better products and customer support

[Brand]
Personal preference
[Brand]
Simple preference
[Brand]
Bad hydraulic pumps
Controls aren't as refined as in the case of other brands
Loses power when tracking and using sticks at some time due to one hydraulic pump
No Bluetooth or hands free for phone setup compared to other brands
Uncomfortable seats and no area to hang peace bag
Generally, well behind other leading brands and outdated in cab setup

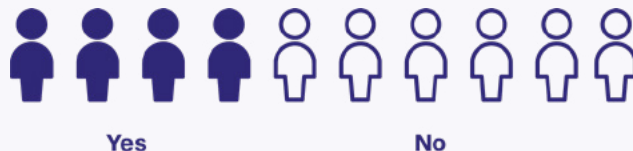
[Brand]



10 Recently, have you seen any advertisements for this brand in specialised media?

According to the results, **58.3% of respondents do not remember seeing an advert** in any specialised media. Slightly less survey participants, **41.7%, confirmed that [Brand]'s advertisement was featured in a specialised media**. Simply, 4 out of 10 people have recently seen [Brand]'s ads. The

construction manufacturer is spending a significant amount of money to enhance the visibility of the brand, however, probably only on a regional level. Furthermore, [Brand] may not prioritise specialised media anymore and focuses on using other types of channels for its brand awareness.



[Brand]

11 Through which channel was it presented?

Two-thirds of survey respondents (66.7%) claimed that the advertisement of [Brand] was presented solely on digital channels. This indicates that the manufacturer currently focuses on online marketing where it sees the biggest potential for the future. Another 26.6% of surveyees

remembered examining the adverts both in print and digital media and only 6.7% stated that the ads were just in the print channels. The data showcases a clear transition from traditional print channels to more developed digital channels in order to catch up with the latest trends and

possibilities. Compared to the classic print advertisement, the digital channels offer a variety of distribution possibilities, enhanced visibility and ease-of-use. Furthermore, the majority of readers nowadays prefer to open news on their mobile devices.



Print

6.7%

Both
(digital and print)

26.6%

Digital

66.7%

General ad about [Brand]

[model] wheel loader
with technical specs

YouTube video about
the company's products

[Brand]

12 What was communicated in these commercial ads?

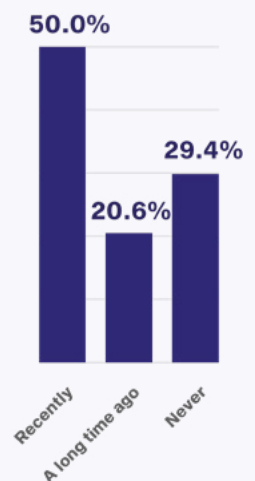
Those survey participants who observed **print commercials of [Brand] were unable to describe its content.** On the other hand, those who have seen the **digital advertisement remember more details:** They claimed to explore general ads about marketing of the OEM, spotting ad featuring the [Model] wheel loader and its technical specifications or a You-

Tube video with highlights of [Brand] products. The results outline the success of digital content compared to older print options - the audience had difficulties remembering the printed advertisement, but managed to bring up information about digital advertising that is easier to share and thus offer enhanced visibility compared to the traditional format.

13 Have you ever visited the webpage of the brand?

Up-to-date and convenient webpage is the core of every large company nowadays. It is the main marketing tool and entry gate for users that can be potentially turned into customers. Furthermore, it is the first connection between the manufacturer and its current customers. Exactly one half of the survey participants **(50%) have recently visited the webpage of [Brand].** This is a good sign for the manufacturer, because it

signals an active audience who is used to visiting the webpage quite often and considers it a first source of information about the brand. Next, 20.6% of people admitted visiting the manufacturer's website, but a long time ago. Finally, **29.4% of the respondents have never visited the online site.** They are either not interested in additional information about [Brand] or choose to approach different media channels.



[Brand]

14 Have you found all the information that you were looking for on the webpage?

It is important to provide reliable and interesting information on the company's webpage in order to keep the audience. Most of the surveyees **(62.5%) were able to find the desired**

information on [Brand]'s website. On the other hand over one-third of people **(37.5%) were not satisfied with the provided information** online. In other words, 6 out of 10 users have found

all the information on the webpage of [Brand]. The users who were not pleased were presumptively looking for a different kind of information or something too specific.



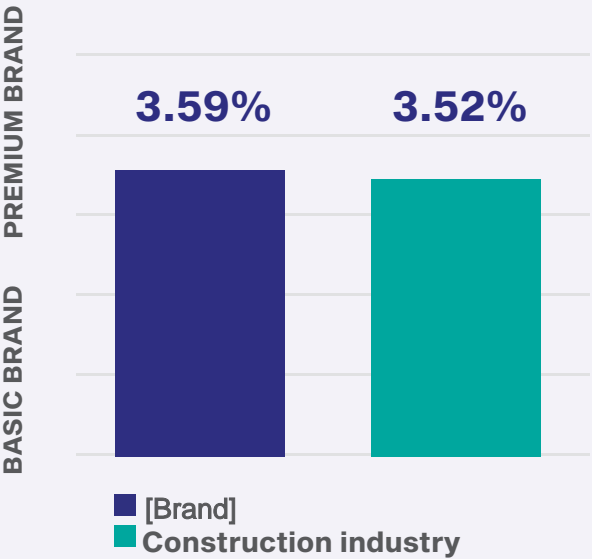
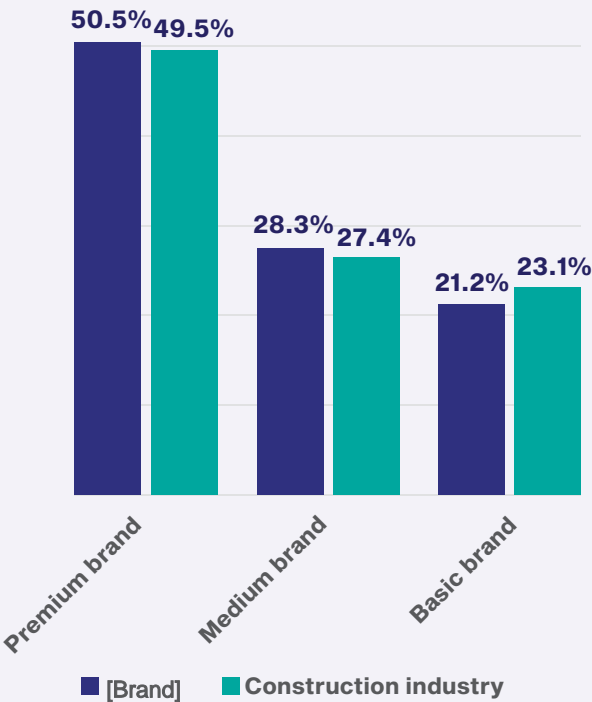
[Brand] VS. CONSTRUCTION INDUSTRY



[Brand]

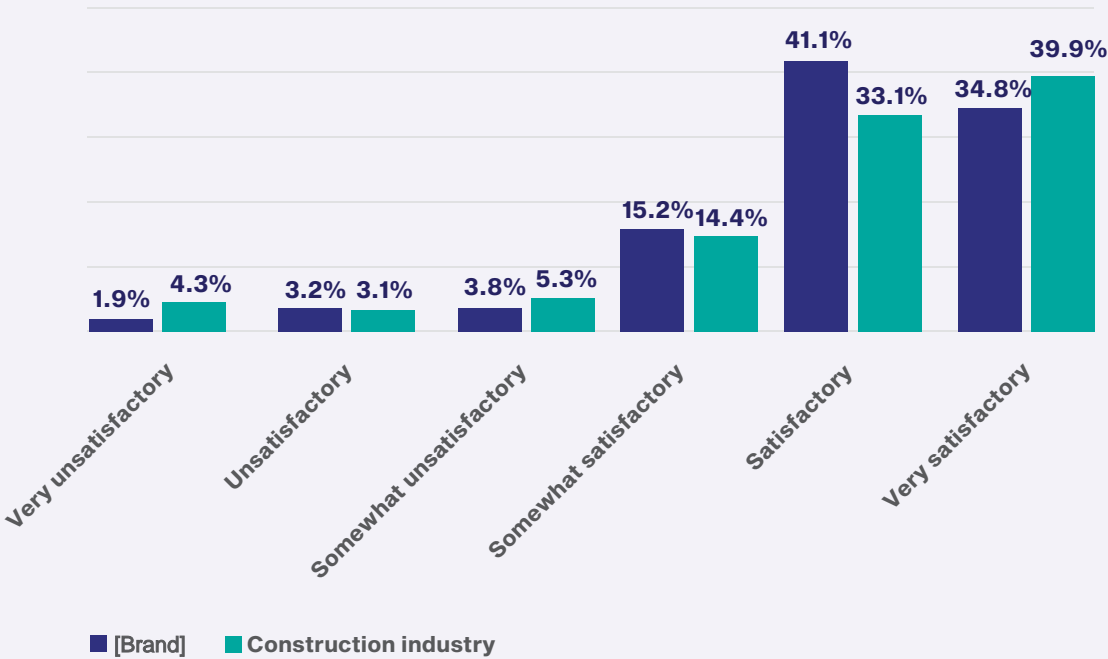
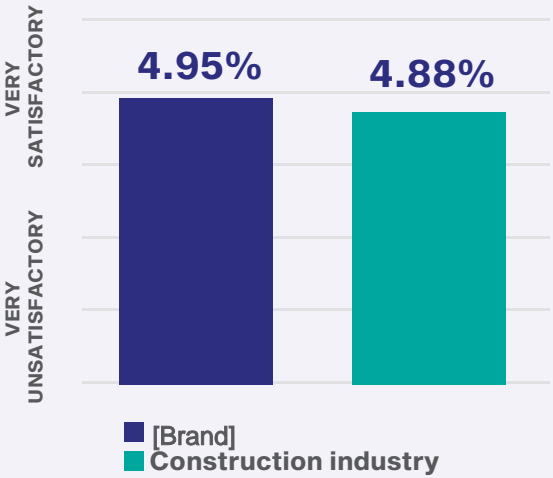
How do you consider this brand to be in general?

In this survey, [Brand] received on the scale of general brand evaluation where 1 represents a basic brand and 5 premium brand the score of 3.59. It is slightly above the industry average of 3.52. The difference is the results of prevailing replies under the option medium brand and basic brand. For the medium brand option, in the case of [Brand] there fell 28.3% of replies, whereas for the whole industry, the number was 27.4%. For the latter (basic brand), in the case of [Brand] it was 21.2%, even though for the whole industry, it was 23.1%. Also, compared to the construction sector, where there was, on average, 49.5% of options indicating the evaluated brand was on the premium level, for [Brand] things look a little better as 50.5% fell under the premium category. However, such a rating is not an indicator for the quality of [Brand] machines, for example - the point is primarily to show the brand position compared to that of its competitors and for what kind of clients the products and the approach, in general, would be most suitable.



How would you rate this brand's dealership network in your country?

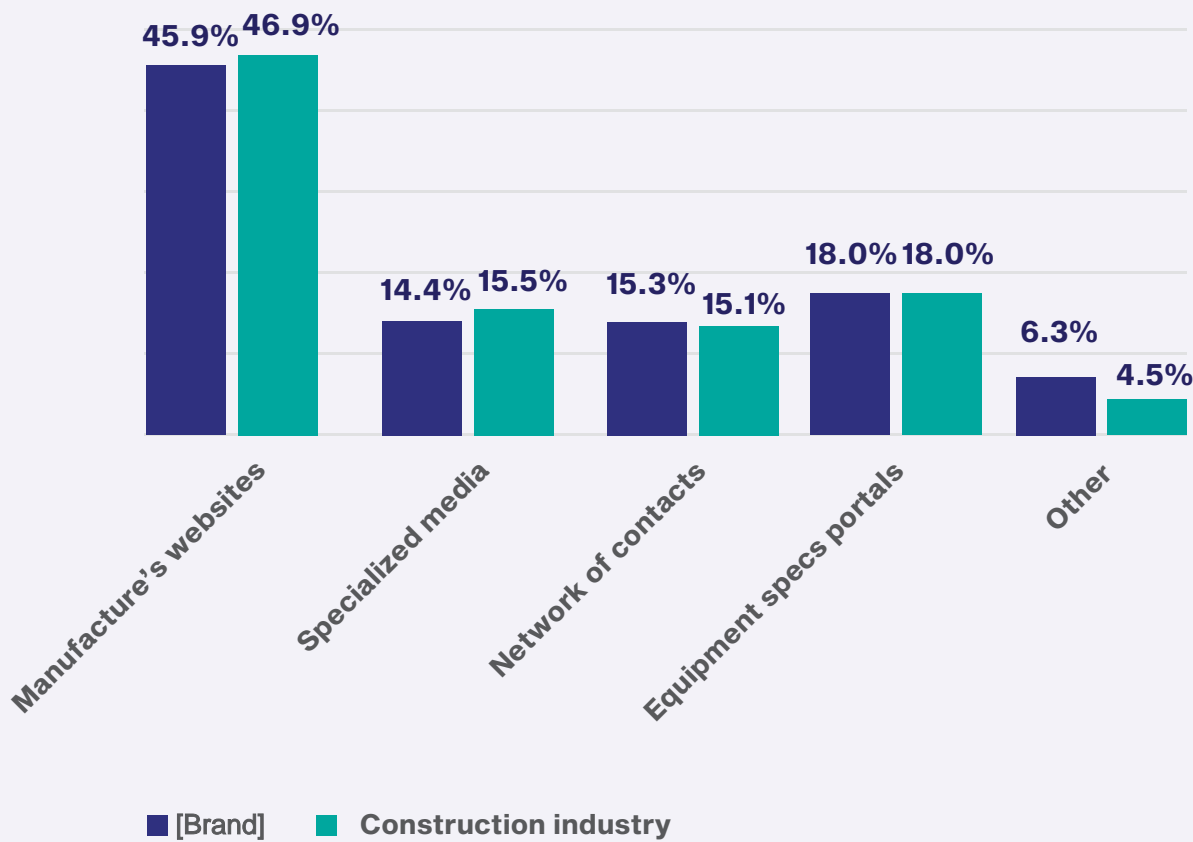
The comparison of the satisfaction within the dealership network throughout the countries of origin of survey respondents outline that the American manufacturer performed above the industry average (4.95 vs 4.88 points on a 6-point scale). The graph shows that [Brand]'s dealership network was given the best ranking of very satisfactory by 34.8% of respondents, while the industry's average reached a bit more - 39.9%. However, when it came to the very unsatisfactory ranking, [Brand] was selected by only 1.9% of respondents, compared with 4.3% that represent the construction sector's average result.



Where do you mostly look for information about this brand and its products/services?

The preferences for primary sources of information about [Brand] do not significantly differ from those of the industry. The most popular source is the manufacturer's website - differentiated by just 1%, as [Brand] received 45.9% of votes, while the

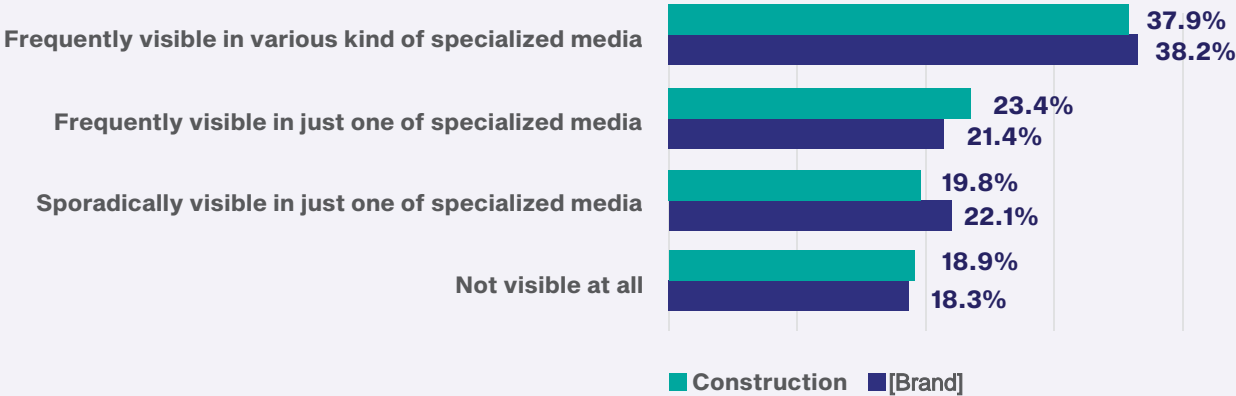
construction industry got 46.9%. The same happened for specialised media, network of contacts that registered almost similar results, even identical when it came to equipment specs portals who were indicated by the same percentage of people (18%).



How do you consider this brand to be visible in the media?

What can be, based on the survey results, more carefully considered by [Brand] representatives is the media visibility of the brand. In the construction industry, considering all brands evaluated in this survey, almost 38% respondents say the brand is frequently visible in various kinds of social media, while in the case of [Brand] it is a little higher, of 38.2%. Also, only 21.4% think that [Brand] is frequently visible at least in just one of specialised media, yet another 22.1% admits the media presence is sporadic. The need for reconsideration of media presentation is mostly highlighted by the fact that 18.3% of respondents

have never seen any [Brand] related information in specialised media and think the brand is not visible at all. Variety of options would be good to be considered to improve such scores. Magazines (printed or online) and online social media can promise the brands to reach their target audience in a relatively short time. The threat for the brand could be that once they lack, even compared to the competitors, the visibility, other brands making similar products may attract even the current customers.



[Brand] VS. COMPETITORS



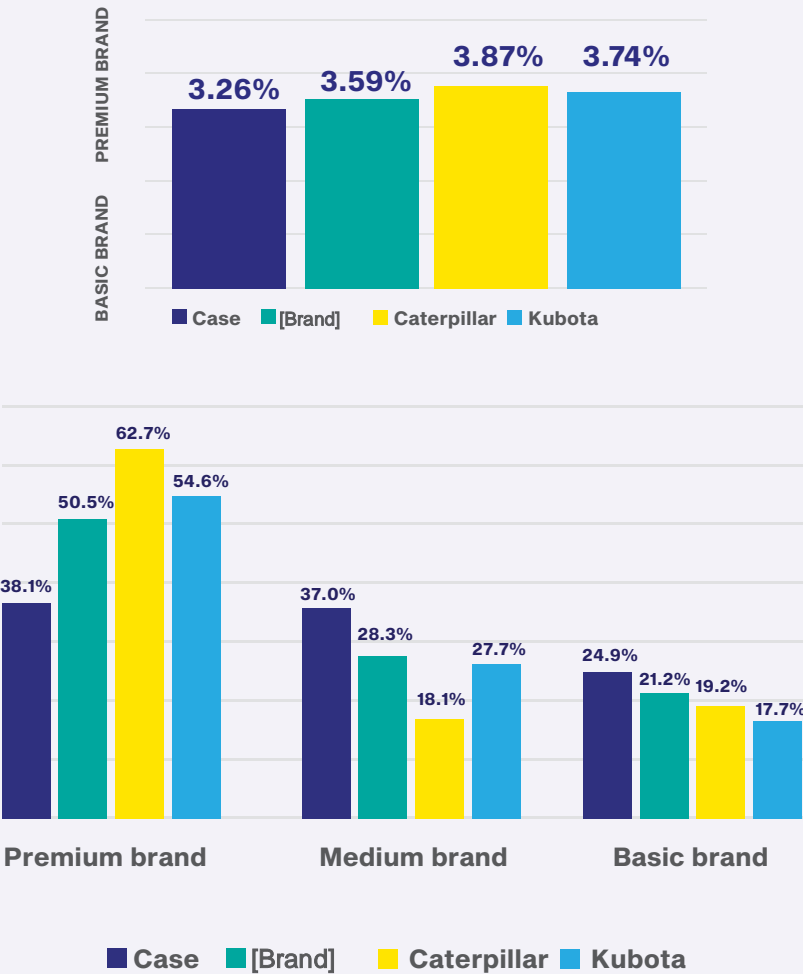
[Brand]

How do you consider this brand to be in general?

[Brand]’s closest market competitors (in terms of the products and services) are, based on the survey’s replies, Case, Caterpillar and Kubota. Although many respondents claimed these to be even better, compared to [Brand] the average brand ratings were higher only for Caterpillar and Kubota. On the scale from 1 (basic brands) to 5 (premium brands),

[Brand]’s rating was 3.59. Kubota scored 3.74 and Caterpillar even 3.87 - that was probably given by the fact more than half of respondents claimed these brands to be of a premium quality. On the contrary, Case, receiving the average rating of 3.26 was considered premium by 38.1%, medium by 37%, and almost 25% even said the brand is rather a basic

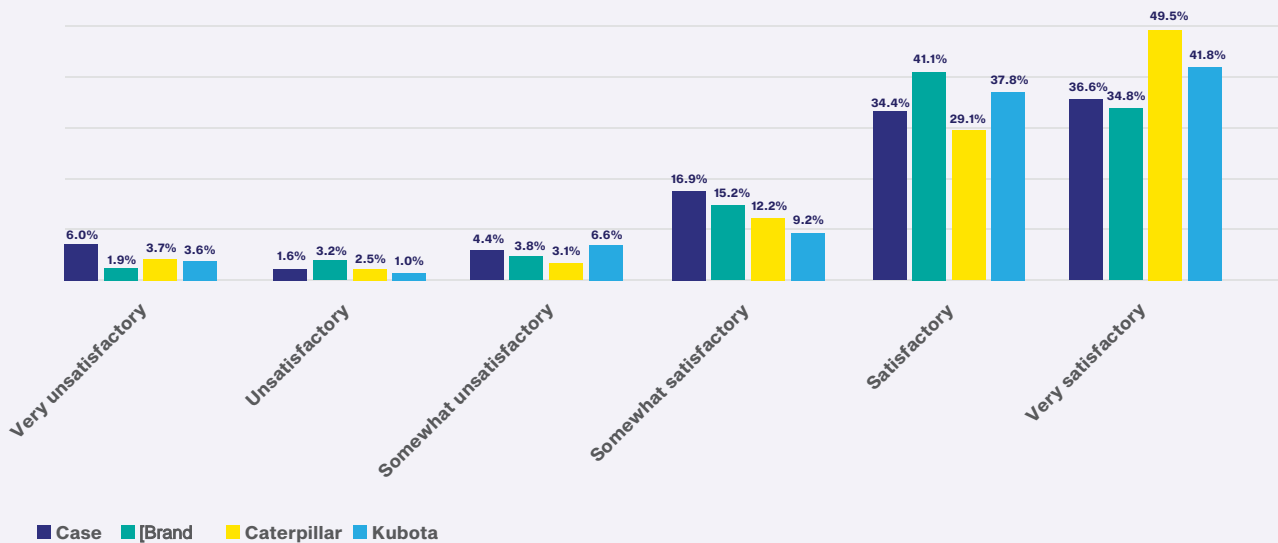
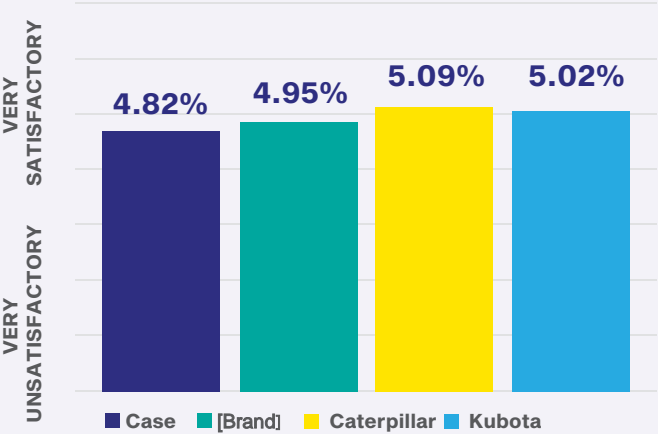
one. Although in terms of percentages the results indicated a difference between [Brand] and the mentioned competitors in premium and medium categories, when it came to the basic one, the American company received a rating that was similar to those of the other brands.



How would you rate this brand's dealership network in your country?

Dealership networks have sort of a significant impact on how people perceive the brand and its reliability. Among the closest market competitors, [Brand] received a rating of 4.95 on the scale from 1 standing for very unsatisfactory dealership to 6 representing a very satisfactory dealership network which was higher only compared to that of Case (4.82). Brands like Caterpillar and Kubota registered a higher rating of 5.09 and 5.02, respectively.

The analysis of single options interestingly reveals that even though [Brand] did not receive the highest total rating, the rating then appears to be improved by the number of people that marked the brand as the first option standing for by the lower numbers of people that are dissatisfied, just 1.9%, compared to 6.0% registered by Case, for example.



What machine type (category/class/model) do you consider to be the best product of this brand?

All these four brands manufacture construction equipment. Moreover, to a lesser extent Caterpillar manufactures forklifts, too. Besides these, both Kubota and Caterpillar also produce machine components. Of the other equipment categories on which the brands focus the most, agricultural machinery (Case) and municipal technology (Kubota) were also mentioned.

For each brand, a rank of at most 5 top equipment categories mentioned in the survey was made. Besides crawler excavators that were mentioned on the 3rd position for both [Brand] and Case, people indicated different machines on different positions for all the other brands. In Brand's case, skid skid loaders were ranked in the first position as its best products, followed by mini excavators, crawler excavators, telehandlers and wheel excavators in the last position.

TOP 5 equipment categories

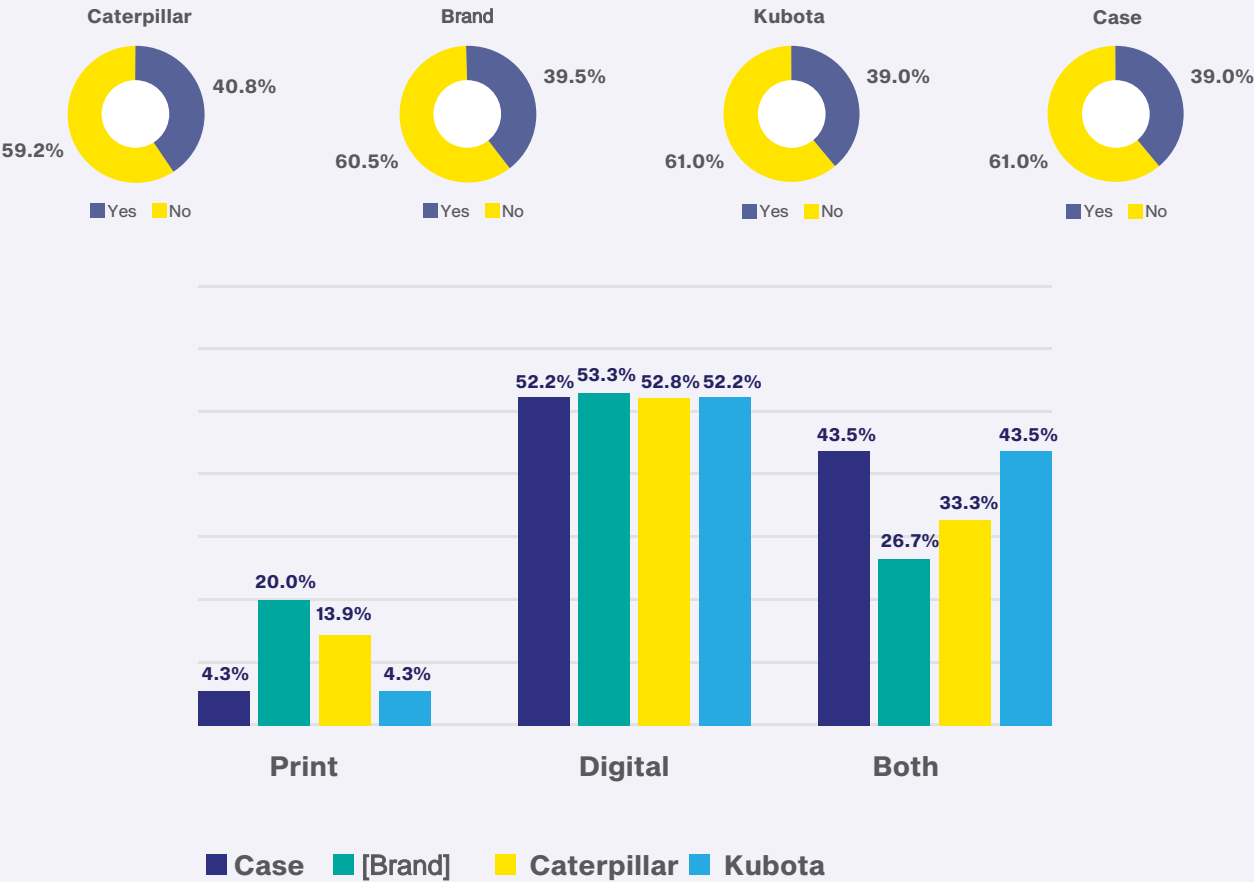
	Case	Caterpillar	Kubota	[Brand]
1	Backhoe loaders 590 580 695 ST	Wheel loaders	Mini excavators U27-4 U20 KX057-4	Skid Steer Loaders
2	Skid Steer Loaders 1840 SR 250	Crawler excavators 323 320	Engines D1105	Mini excavators
3	Crawler Excavators CX 210	Bulldozer D6T D8R	Digger for Grave excavation	Crawler excavators
4	Wheel Loaders	Backhoe loaders	Compact utility tractors L 4240	Telehandlers
5	Mini Excavators	Skid Steer Loaders	4WD tractors	Wheel Excavators

Recently, have you seen any advertisements for this brand in specialised media?

When comparing [Brand] and other brands in terms of their adverts visibility and perceived by potential recipients such as (potential) customers, the rates of people saying they have recently seen any ad are around 40%, which is quite similar compared to Case and Kubota (39.0%) and slightly less compared to Caterpillar (40.8%).

Also, when it comes to the channel through which the brands are presented, most brands appear to be more present on digital channels. Actually, the results are very similar for all 4 brands mentioned: [Brand] scored 53.3%, Case and Kubota both registered the same percentage (52.2%), and Caterpillar 52.8%.

Interestingly, Case and Kubota registered the lowest rate of people that saw the ad in a print channel, while Brand was mentioned by 20% of those questioned in the survey.



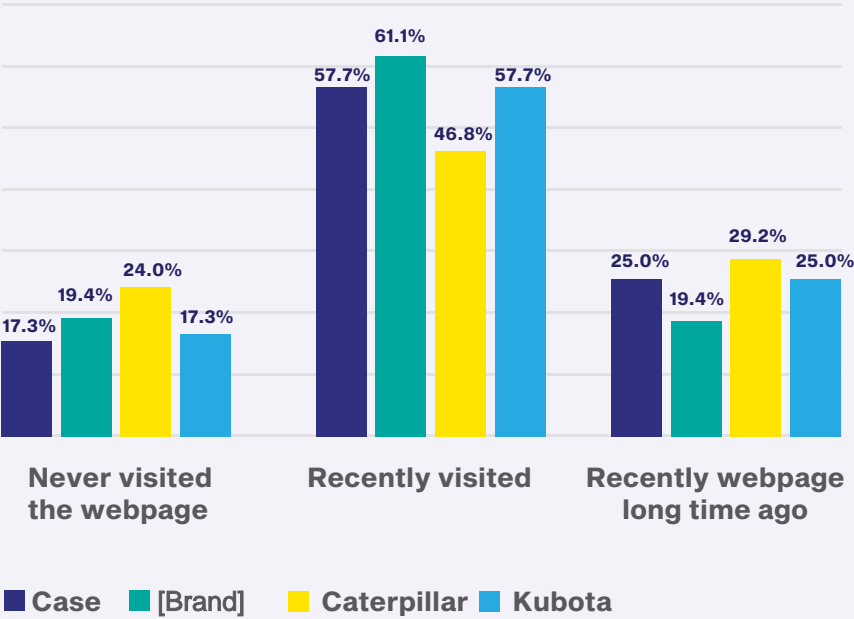
Have you ever visited the webpage of the brand?

Almost 46.9% of survey respondents search for construction equipment related information directly on manufacturers’ websites. That puts some demands on the page’s visibility. In [Brand]’s case, almost 81% of this survey respondents claim they have ever visited the webpage, 61.1% recently and 19.4% a long time ago. However, two competitors may,

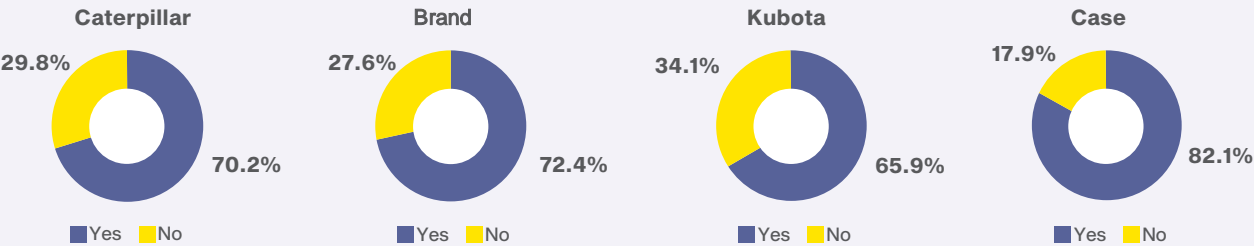
however, dispose of a slightly better website traffic - Case and Kubota who scored the same percentage (82.7%), while Caterpillar registered a smaller one, of 76%.

When it comes to the webpage content - whether the people found all information they were looking for on the webpage, respectively - the

rates do not appear to differ significantly. For all four brands, from 65.9% to 82.1% respondents claimed they found all they were looking for. Yet, [Brand]’s rates were significantly higher only compared to those of Caterpillar (70.2%) and Kubota (65.9%), as Case registered the best results (82.1%).



Have you found all the information that you were looking for on the webpage?



✓ Full report - 18 brands in total



The full report includes insights on 17 other brands

...Including the comparison parts

- 1) Bobcat
- 2) Bomag
- 3) Case
- 4) Caterpillar
- 5) Doosan
- 6) Hitachi
- 7) Hyundai
- 8) JCB
- 9) John Deere Construction
- 10) Kobelco
- 11) Komatsu
- 12) Kubota
- 13) Liebherr
- 14) Manitou
- 15) Takeuchi
- 16) Volvo
- 17) Wacker Neuson
- 18) Yanmar

LECTURA is ready to dig much deeper to get you even more value.

Let's stay in touch!

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