LECTURA

Brand Survey 2023

Agricultural sector review

SURVEY PROUDLY
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the sponsors

KRAMP GmbH

Kramp offers spare parts and services for specialist dealers and workshops in the fields of agricultural technology, forestry and gardening as well as construction machinery. An extensive range, high storage capacities, fast delivery and perfect e-business solutions make Kramp a reliable business partner for its customers.

Founded in 1951 in Varsseveld, the Netherlands, Kramp now has 11 distribution centres and operates in 23 European countries. In addition to selling spare parts and accessories of well-known top brands, Kramp offers all kinds of technical services ranging from machining and milling to the pressing of hydraulic hoses. Furthermore, Kramp supports its dealers concerning their shop as well as in the further training of their employees via the Kramp Academy or in connecting their inventory management system.

www.kramp.com

PART 1:

Introduction

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

Since 1984,

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

not only in Europe, but also in the rest of the world, by providing companies with comprehensive machinery data to support their purchase decisions.

Every month,

1,300,000 visitors

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

170,000

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 brand is the mirror of a business.

Following the 2022 BrandSurvey focusing on the construction sector, LECTURA BrandSurvey 2023 is expanding into the agricultural industry.

Brand reputation in society, communication of its values and strategy, is supposed to guide customers through the market in search of the right product.

Without a clearly emphasised and unique brand identity, customers might get lost in the plethora of competitors offering at first glance, if not the same, similar products.

The purpose of the brand is to make an impression strong enough to serve as a beacon assuring the customers the brand is the right one for them in terms of the products and services they are looking for.

The better the experience is, and the more precisely the brand communicates what the customers can find in its portfolio, the greater the satisfaction and loyalty of the customers.

Of course, the brands regularly try to monitor these concepts to maintain their position in the market, adjust product portfolios, marketing strategies, etc.

Yet, the questions LECTURA asked were:

What kind of audience are the brands usually asking?
Their customers - people that have already bought some products?
What about other people, then?

There are many stakeholders within the industry – probably all of them eager to know how the brands are doing and how they perform compared to competitors.

What about the customers, people searching for an agricultural machine, looking for reviews reliable enough to help them decide on which brand to invest in - considering not only the quality of the product itself, but also the dealership network in their area, parts availability and after-sales service?

With this in mind, LECTURA presents the BrandSurvey 2023 as a communication bridge between all players in the industry.

The audience:

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

The brands:

Have the chance to receive a clear, honest, comprehensive view of their brand awareness (how well they advertise, if their communications strategies pay off in terms of media visibility, how often they interact with the audience and what style, 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 anywhere.

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

Method: Online survey

Through a set of 9 questions shared via an online survey within brand profiles on LECTURA Specs website, we covered topics such as brand satisfaction, brand visibility, and strengths and weaknesses of the brand.
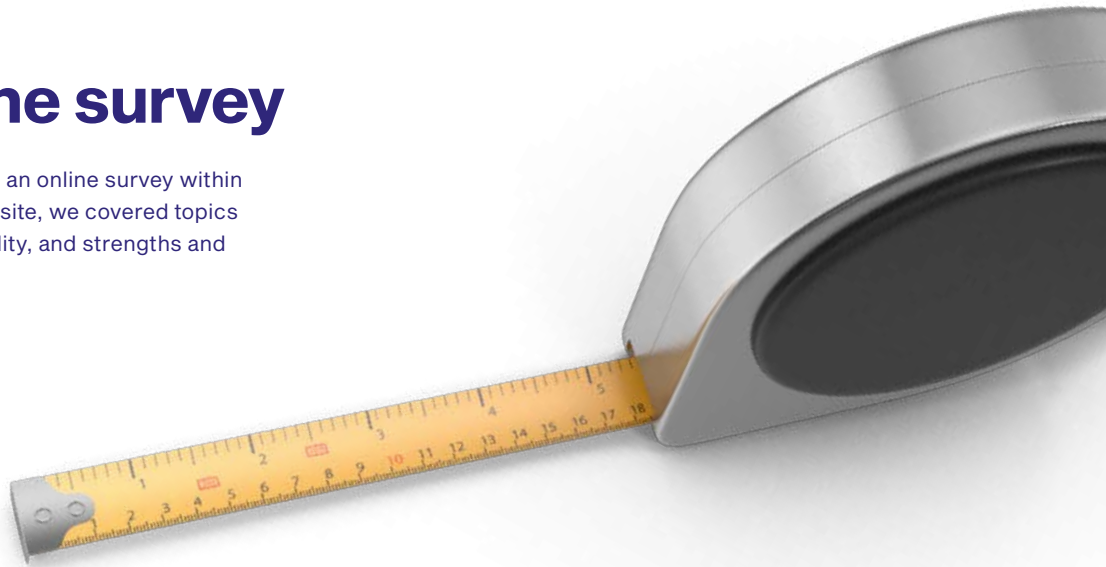
Targeted audience

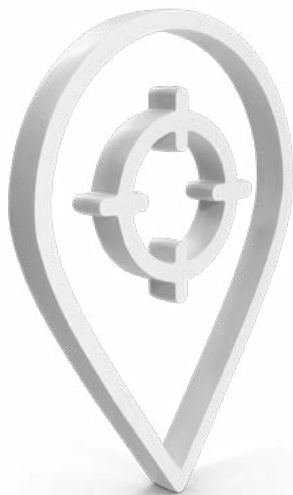Our aim was to get the answers from customers and potential customers from Europe as well as from the United States and Canada. The locations are defined partially by the strength of local markets as well as by markets where LECTURA actively contributes.

Europe

Each report provides the results for the whole of Europe – all 43 countries together (Russia not included). The results are then split into regions:

- Balkan Peninsula: Croatia, Serbia, Kosovo, Montenegro, Bulgaria, Bosnia and Herzegovina, Albania, Macedonia

- Benelux: Belgium, Netherlands, Luxembourg

- Central Europe: Czech Republic, Slovakia, Slovenia, Poland, Hungary

- DACH: Germany, Austria, Switzerland, Liechtenstein

- Eastern Europe: Lithuania, Latvia, Estonia, Belarus, Ukraine, Moldova, Romania

- France

- Iberia: Portugal, Spain, Andorra

- Nordic countries: Iceland, Denmark, Finland, Norway, Sweden

- Southern Europe: Italy, Greece, Cyprus, Malta

- United Kingdom and Ireland

Furthermore, 9 countries of the greatest share are approached individually (Belgium, Netherlands, France, Italy, United Kingdom, Poland, Germany, Austria, Spain)
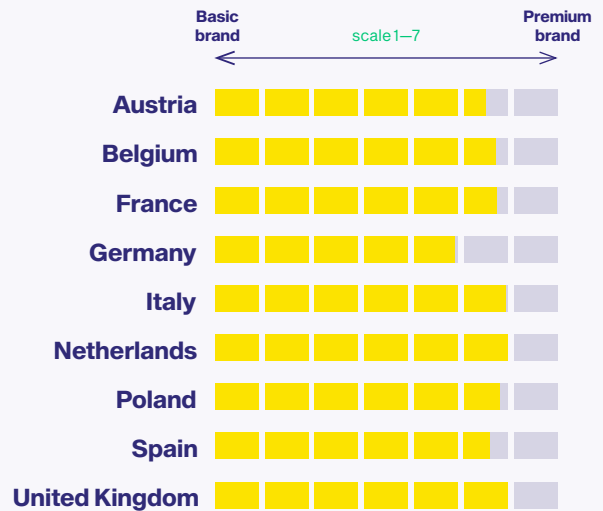
The United States and Canada

The report presents the results for each of these North American countries.

Have not found the location of your interest in this report?
Interested in how the brand is perceived in your country? Contact us.

1 How would you rate this brand in general?

The respondents were asked to evaluate the brand in general (considering the quality of products, services, availability, customer treatment etc.) on a scale from 1 to 7, where 1 stands for a "Basic brand", meaning the brand requires a lot of progress to handle various customers' needs, and 7 stands for a "Premium brand" representing the fact the brand is well-prepared to serve a wide range of customers with various needs and maintain its services on a high-quality level through the time.

In the graphs, mean values are presented.

Basic brand — scale 1—7 — **Premium brand**

Austria	
Belgium	
France	
Germany	
Italy	
Netherlands	
Poland	
Spain	
United Kingdom	

2 How likely are you to recommend this brand to a friend or a colleague?

The question pushes forward the examination of brand satisfaction and opinions about the brand. Net promoter score (NPS) was chosen for the illustration.

NPS also indicates the confidence to recommend the brand to others, thus providing information about loyalty toward the brand..

Based on the score on a scale from 0 to 10, where 0 means that people would not recommend the brand at all and 10 means they would very likely do so, three groups of people are defined.

Promoters: People, who are satisfied with the brand enough to put their name in recommending the brand to others, helping the brand to get new customers, consequently.

Passives: People, who might be satisfied with the brand, yet are unenthusiastic and can be swayed by more competitive options.

Detractors: People who are not satisfied and might even share their negative thoughts about the brand.

The final NPS score is calculated by subtracting the percentage of detractors from the percentage of promoters (score from -100 to 100).

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

The respondents evaluated the dealership network by describing their experience by choosing the most corresponding option:

1. Very unsatisfactory ▪
2. Unsatisfactory ▪
3. Somewhat unsatisfactory ▪
4. Somewhat satisfactory ▪
5. Satisfactory ▪
6. Very satisfactory ▪
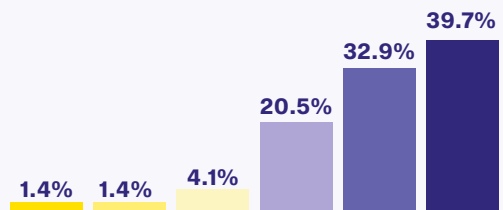
The graphs show how many percent of people choose the options.

Moreover, the replies were put on a scale from 0% (very unsatisfactory) to 100% (very satisfactory) and visualised as an infographic – tachometer. The Tachometer needle with % represents the mean values of the scale.

1.4%   **1.4%**   **4.1%**   **20.5%**   **32.9%**   **39.7%**

84%
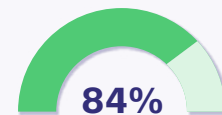
4 From your point of view, how visible is this brand in the media?

The survey participants were asked to choose which of the four options best describes their opinion about the media visibility of the brand:

1. Not visible at all ▪
2. Rarely visible ▪
3. Occasionally visible ▪
4. Frequently visible ▪

The graphs depict how many people (in %) choose each of the options.

6.7%   **11.2%**   **29.9%**   **52.2%**

4.1 In which type of media is the brand more visible?

Each person who claimed to notice the brand in the media was called upon to indicate in which kind of media, digital or print, he or she has been seeing it more frequently.
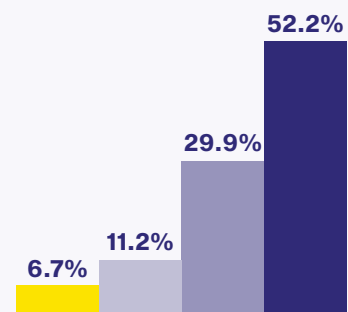
The graphs depict how many people (in %) choose each of the options.

13.2%

86.8%

■ **Print media**
■ **Digital media**
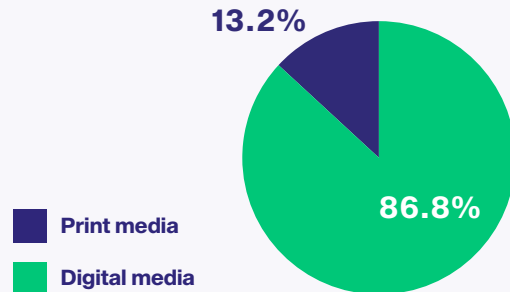
5 Where do you mostly look for information about this brand and its products/services?

The participants could either pick from the predefined options or indicate by themselves where they mostly look for such information. The ones that prefer to look for the information through various channels, were allowed to pick all options that apply.

The graphs depict how many replies (in %) fell for each option.

17.4% 8.1% 14.2% 7.7% 8.8% 15.0% 14.6% 11.9% 2.3%

■ **Manufacturer's website**   ■ **Fairs and events**   ■ **Word of mouth**
■ **Print media**   ■ **Network of contacts**   ■ **Social media**
■ **Digital media**   ■ **Equipment specs online portals**   ■ **Other**

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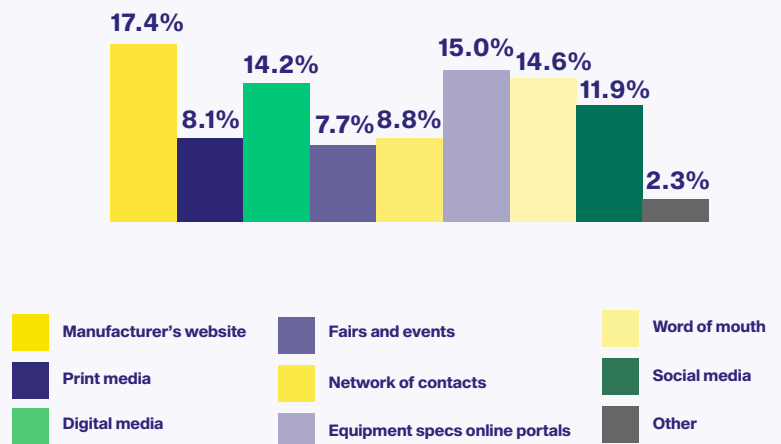
What machine type (category/class/model) do you consider to be the best product of this brand?

The participants could either pick from the predefined options or indicate by themselves where they mostly look for such information. The ones that prefer to look for the information through various channels, were allowed to pick all options that apply.

The graphs depict how many replies (in %) fell for each option.

13.6% **47.0%** **10.1%**

Combine haresters | Tractors | Balers

7
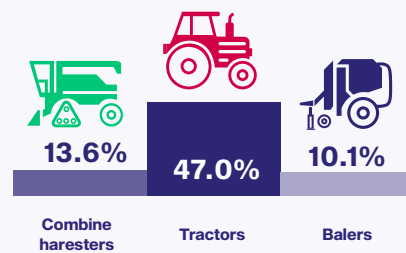
Which brand providing the same/similar kind of service/product would rate better?

Surveyees were asked to identify direct competitors of the brand. They could either choose from the list of predefined options or type in their own reply. The question format allowed them to choose as many replies as required.

The graphs depict the three most frequently mentioned competitors and how many replies (in %) they count.

11.3% **49.0%** **9.4%**

CLAAS | FENDT | KRONE

8 Please share a few things the brand you are currently evaluating can do better:

In the last question, the respondents described in their own words, what is the brand supposed to improve. All replies are depicted in word clouds, the bigger and bolder the font, the more frequent reply. Most interesting replies were selected and elaborated on in the texts below.

They are very expensive , but usually you get what you pay for

Cheaper 8295R

Change the key ignition location on the 3038 compact tractors. I have a 2019 model and I'm always hi

Have smaller dealers than Ag Pro

The newer technology needs to become more user friendly and serviceable by the user.

Efficient mechanics

Easier access to get wrenches in the space. Engineers need to work with mechanics wrenches for a day

Do not lower quality, as in cutting corners to achieve market share.

Biggest improvement would be to allow owner access to repair information.

Better comfort in the cab, and longer lasting tractors

Assisting farmers to repair their equipment if they have the knowledge and skills.

Ag Pro can have better service than it has.

Leave good product alone. If you need more money raise price. I prefer good quality   More ergonomics on the 4r series

Reduce the price of spare parts

There dealership network for central Minnesota is not well liked do to the personality and arrogance

Everything   Warranty   Spare parts more available and cheaper   Reliability

Reduce the price

Go back to concentrating on quality, reliability and lower the price on at least repairs which is ab   Online manuals

Wiring diagrams   Intial quality needs more attention.

After sales services

Allow smaller dealerships, that are more efficent.

Be competitive on machine/ parts pricing.

Price gap between Case and John Deere is widening while the value gap seems to be narrowing

Better part technicians. They need to understand more of what parts people are talking about or ask

Do not allow more than 10 store locations under one owner group.

Do not manufacture the equipment in China

Parts for older models are too hard to find. Local dealer is nearly worthless for help.

Free repair information

Training   Stop monopolizing the dealership network. If there's zero competition for prices we will all find a

Hydraulics

Provide better operator's manuals.

More steel. More robust equipment.

PART 2:

Results

In this chapter, the most interesting findings of the agricultural equipment manufacturers are summarized.

Based on **25,073 reviews of 16 brands** from respondents from 176 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.

John Deere

John Deere is one of the most popular heavy machinery brands across the world. Let's explore the results and see if the survey participants think the same.

In the online survey than ran from 6th March to 19th April, LECTURA received 3,642 reviews on John Deere from 105 countries of the world.
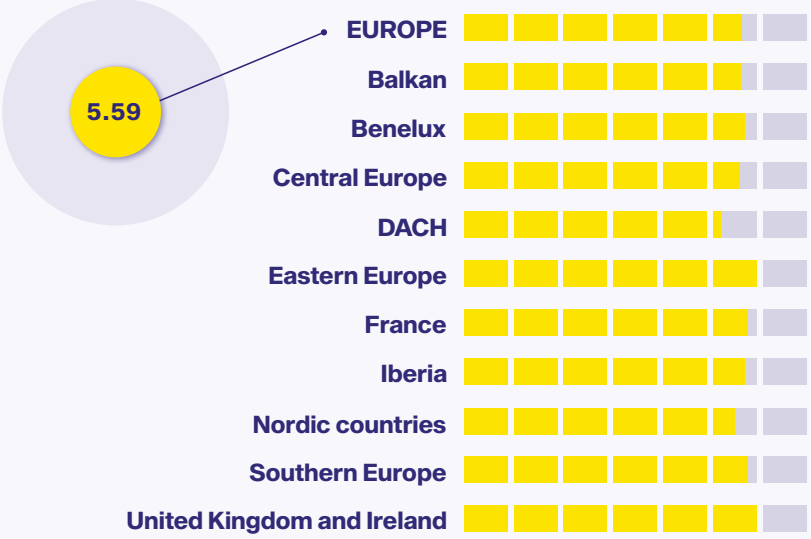
John Deere

1 ## How would you rate this brand in general?

5.56

5.82

6.06

5.14

5.77

6.04
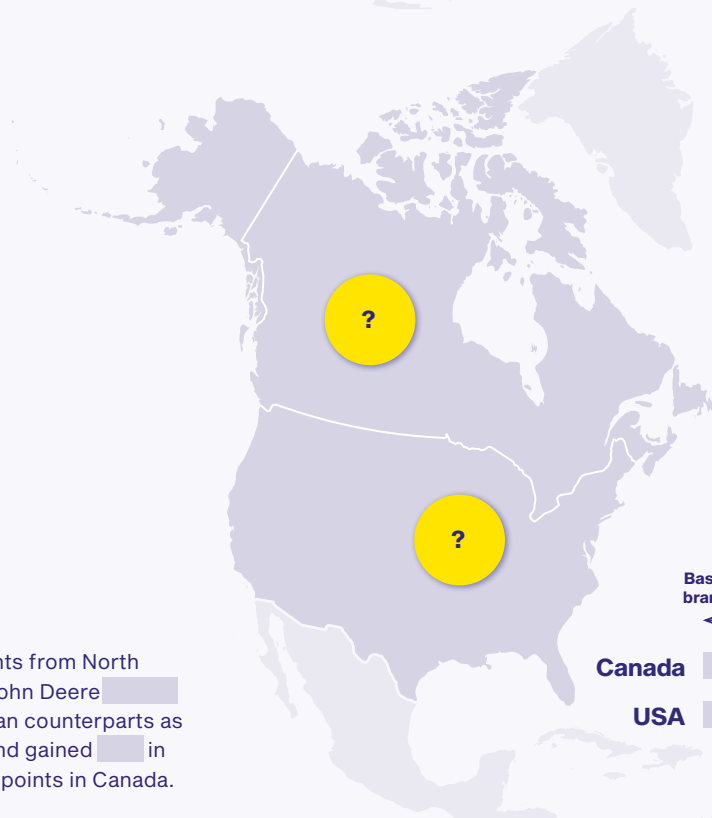
5.79

5.7

5.73

5.84

5.59
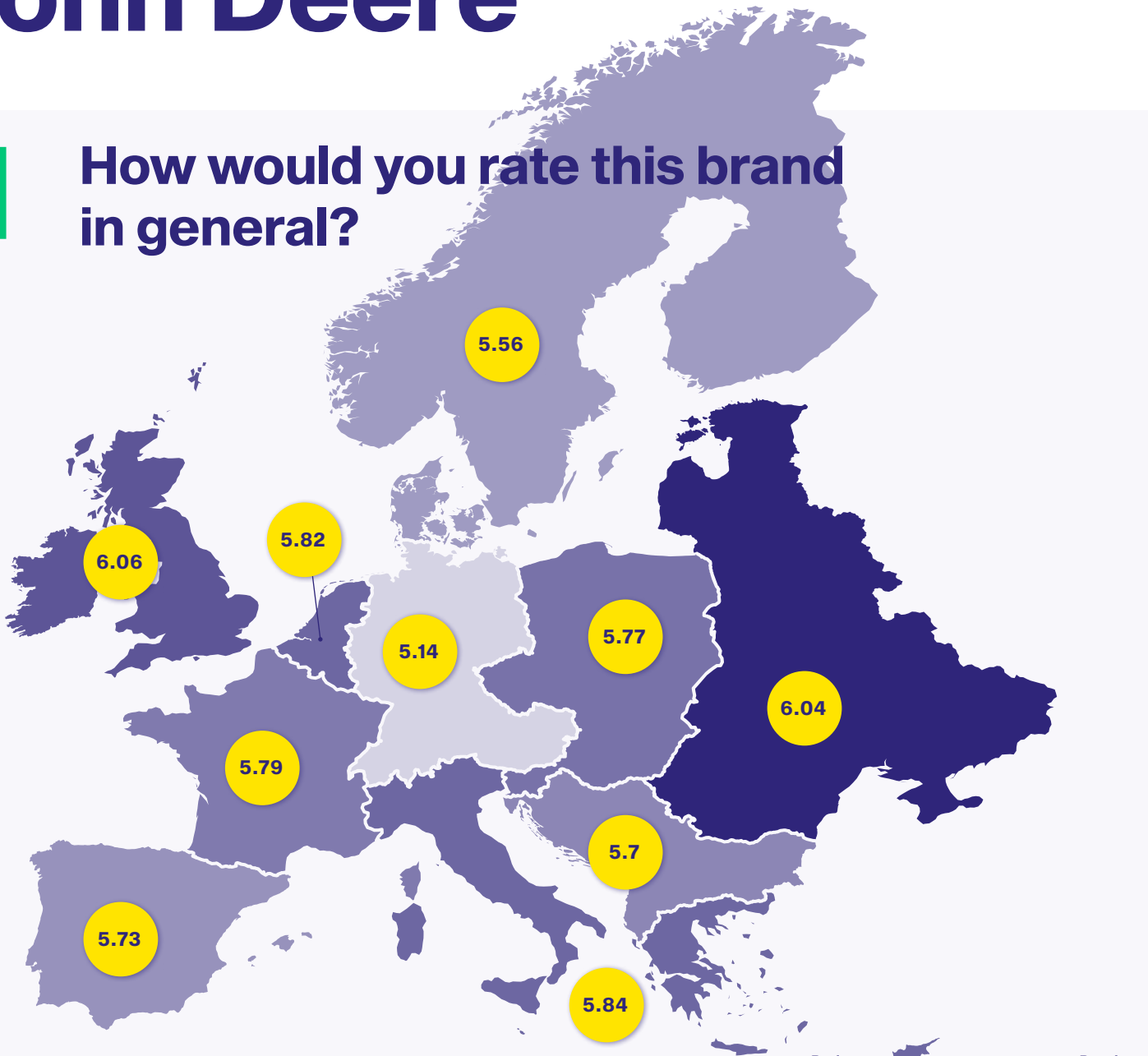
The overall rating of John Deere in European countries is above average – 5.59. But, brand performance is perceived differently in different regions and countries.

Although in the British islands John Deere got the best reception of all European regions, together with Benelux, especially Netherlands, the respondents from Nordic countries and German-speaking countries rated the brand lower – especially in Germany.

Basic brand	scale 1—7	Premium brand

- EUROPE
- Balkan
- Benelux
- Central Europe
- DACH
- Eastern Europe
- France
- Iberia
- Nordic countries
- Southern Europe
- United Kingdom and Ireland

John Deere

1 How would you rate this brand in general?

Basic brand — scale 1—7 — Premium brand

| | Austria |
| Belgium |
| France |
| Germany |
| Italy |
| Netherlands |
| Poland |
| Spain |
| United Kingdom |

?

Basic brand — scale 1—7 — Premium brand

| Canada |
| USA |

?

Survey respondents from North America ranked John Deere [____] than their European counterparts as the American brand gained [____] in the USA and [____] points in Canada.
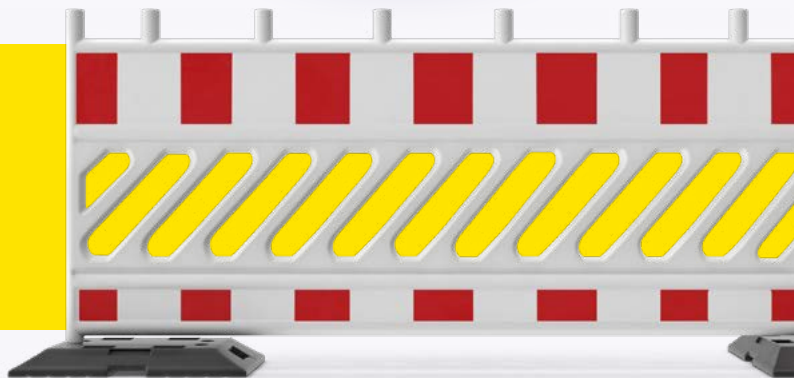
John Deere

2 ## How likely are you to recommend this brand to a friend or a colleague?

VISIT THE SHOP

i **Results for this question are part of the premium report.**

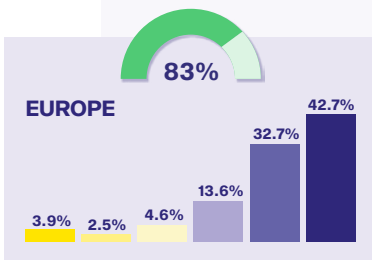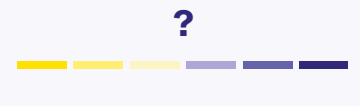**We have the full package waiting for you, just let us know.**

John Deere

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

John Deere's customers are, in general, satisfied with its dealership network. Of the whole European sample, 42.7% of people claimed to be even very satisfied – across regions and countries, the number varies from 37.1% (Balkan Peninsula) to 68.2% (Eastern Europe).

Put on an imaginary tachometer, the result for the whole of Europe is 83% – ranges within 76% (Balkan peninsula) and 88% (Eastern Europe).
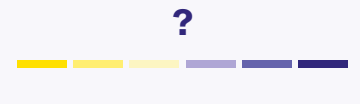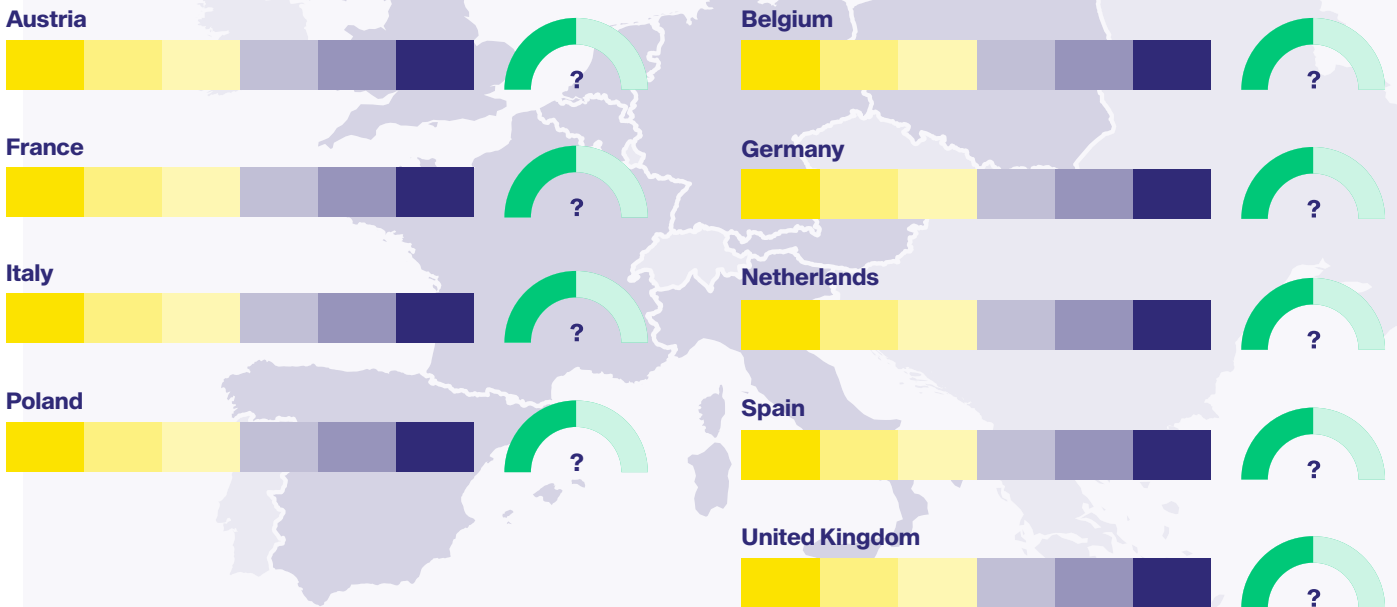
83%

EUROPE

3.9% 2.5% 4.6% 13.6% 32.7% 42.7%

- ■ Very unsatisfactory
- ■ Unsatisfactory
- ■ Somewhat unsatisfactory
- ■ Somewhat satisfactory
- ■ Satisfactory
- ■ Very satisfactory

Eastern Europe
?

Nordics
?

Benelux
?

Central Europe
?

United Kingdom and Ireland
?

France
?

Southern Europe
?

Iberia
?

DACH
?
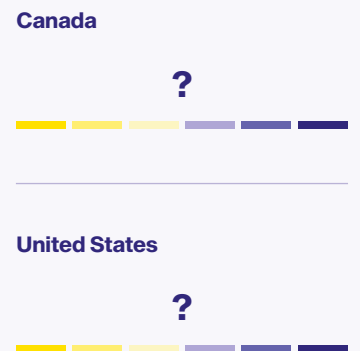
Balkan Peninsula
?

DETAILED BRAND REPORT

John Deere

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

Austria ?

Belgium ?

France ?

Germany ?

Italy ?

Netherlands ?

Poland ?

Spain ?

United Kingdom ?

Very unsatisfactory
Unsatisfactory
Somewhat unsatisfactory
Somewhat satisfactory
Satisfactory
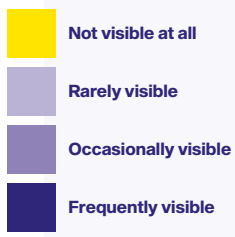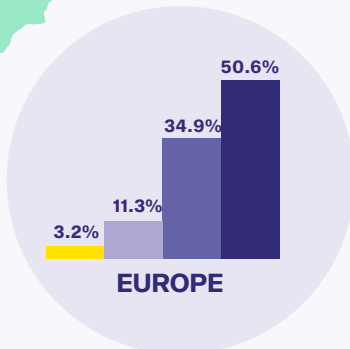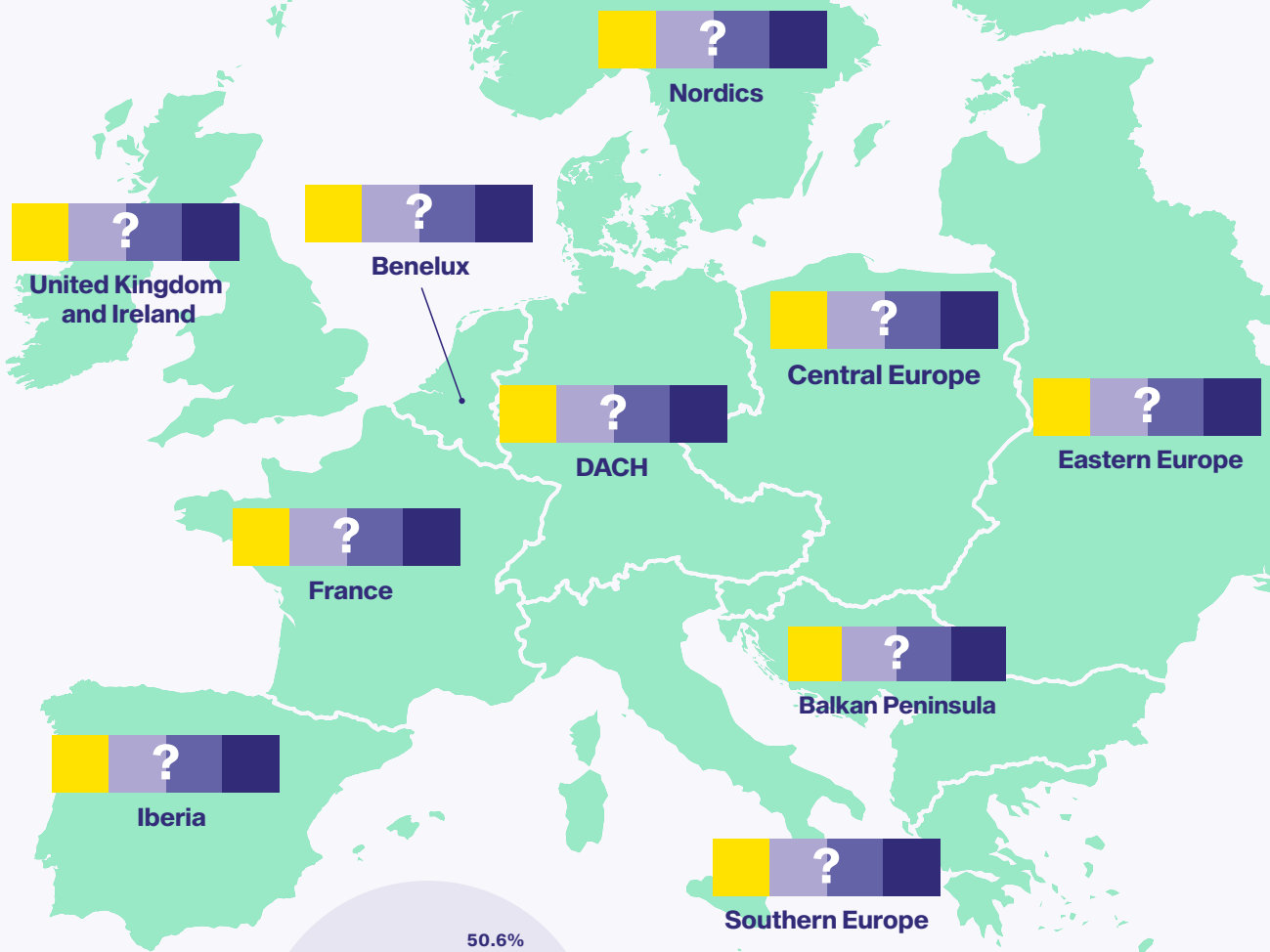Very satisfactory

Canada ?

United States ?

In both Canada and the United States, _____ _____ is represented by scoring ____ on the imaginary tachometer. Around 50% of respondents in both countries claimed _____ .

John Deere

4 From your point of view, how visible is this brand in the media?

Nordics ?

United Kingdom and Ireland ?

Benelux ?

Central Europe ?

Eastern Europe ?

DACH ?

France ?

Balkan Peninsula ?

Iberia ?

Southern Europe ?

EUROPE
3.2%
11.3%
34.9%
50.6%

Legend
- **Not visible at all**
- **Rarely visible**
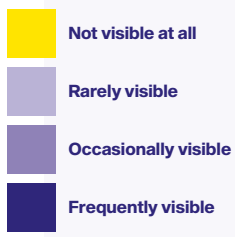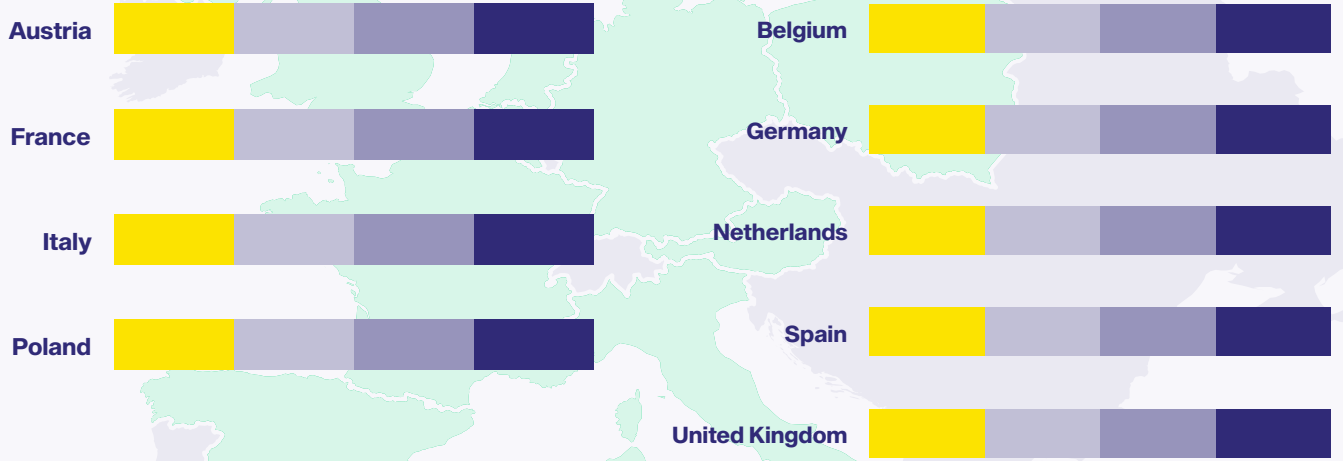- **Occasionally visible**
- **Frequently visible**

There is only 3.2% of people in the European sample that have not noticed John Deere in the media. On a regional scale, it varies from 0% (Nordics) to 6.4% (Balkan peninsula).

The majority (50.6%)of people consider John Deere to be frequently visible – across Europe, the number varies from 42% to 72%.
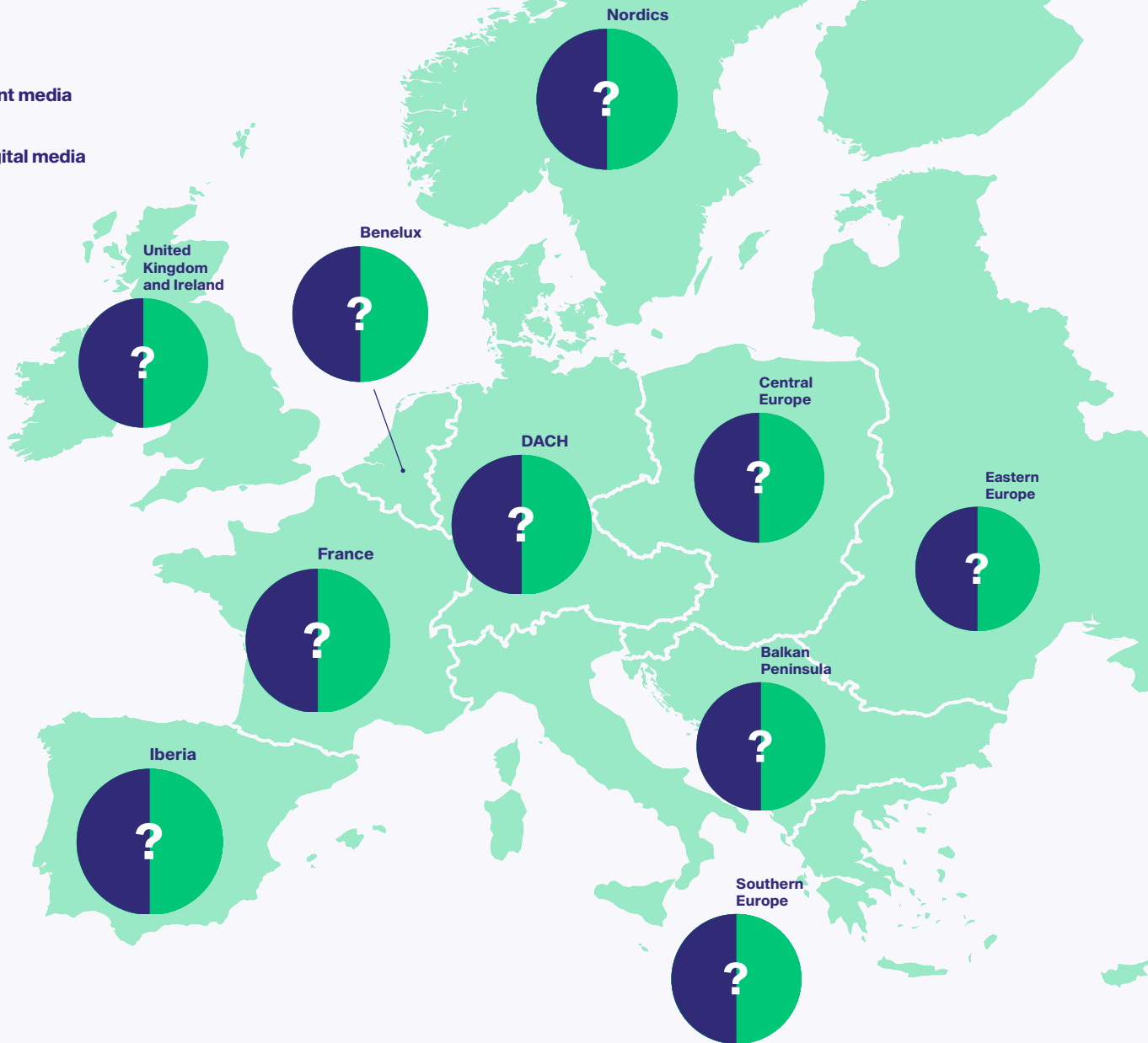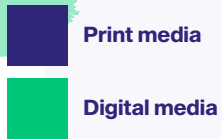
John Deere

4 From your point of view, how visible is this brand in the media?

Austria

France

Italy

Poland

Belgium

Germany

Netherlands

Spain

United Kingdom

Canada ?

United States ?

Legend:
- Not visible at all
- Rarely visible
- Occasionally visible
- Frequently visible

_____ by John Deere is clearly visible in the North American region as close to _____ of survey participants claimed that the American manufacturer is _____ _____ – on the other hand, _____ _____ .
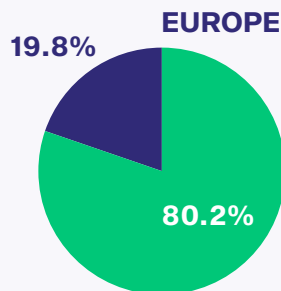
John Deere

4.1 In which type of media is the brand more visible?

- Print media
- Digital media

Nordics ?

Benelux ?

United Kingdom and Ireland ?

DACH ?

Central Europe ?

Eastern Europe ?

France ?

Balkan Peninsula ?

Iberia ?

Southern Europe ?

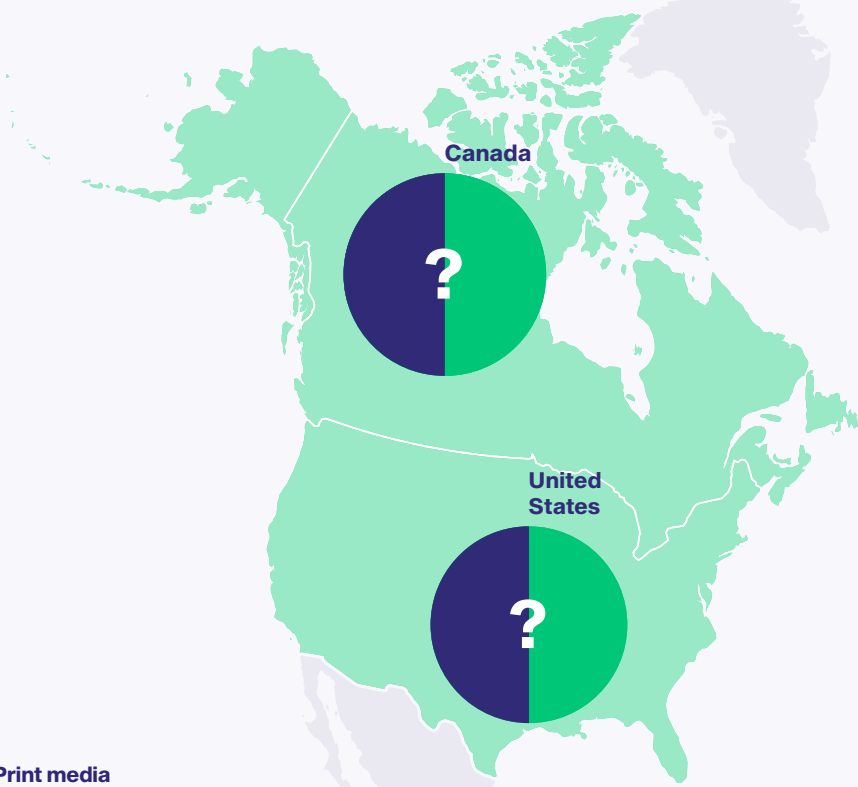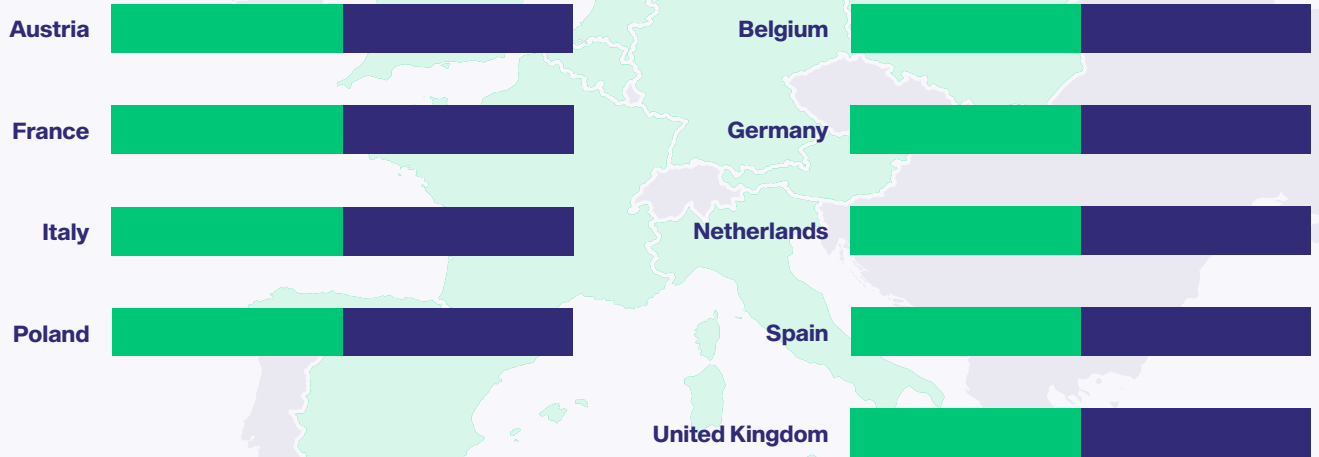**The trend is clearly to go digital.**

More than 80% of surveyees from Europe remembered the presence of John Deere rather in the digital media.

Across regions and countries, the number varies from 72.5% (Belgium) to even 100% (Eastern Europe).

EUROPE

19.8%

80.2%

John Deere

4.1 In which type of media is the brand more visible?

Austria

Belgium

France

Germany

Italy

Netherlands

Poland

Spain

United Kingdom

Canada

?

United States

?

■ Print media

■ Digital media

The North American region seems to be ▆▆▆▆▆▆▆▆▆▆ as around ▆▆▆ of participants chose ▆▆▆▆▆▆▆▆▆▆▆▆▆▆. The impor-tance of ▆▆▆▆▆▆▆▆▆▆▆▆▆ ▆▆▆▆▆▆▆▆▆▆▆▆▆ in the case of John Deere.

John Deere

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

VISIT THE SHOP
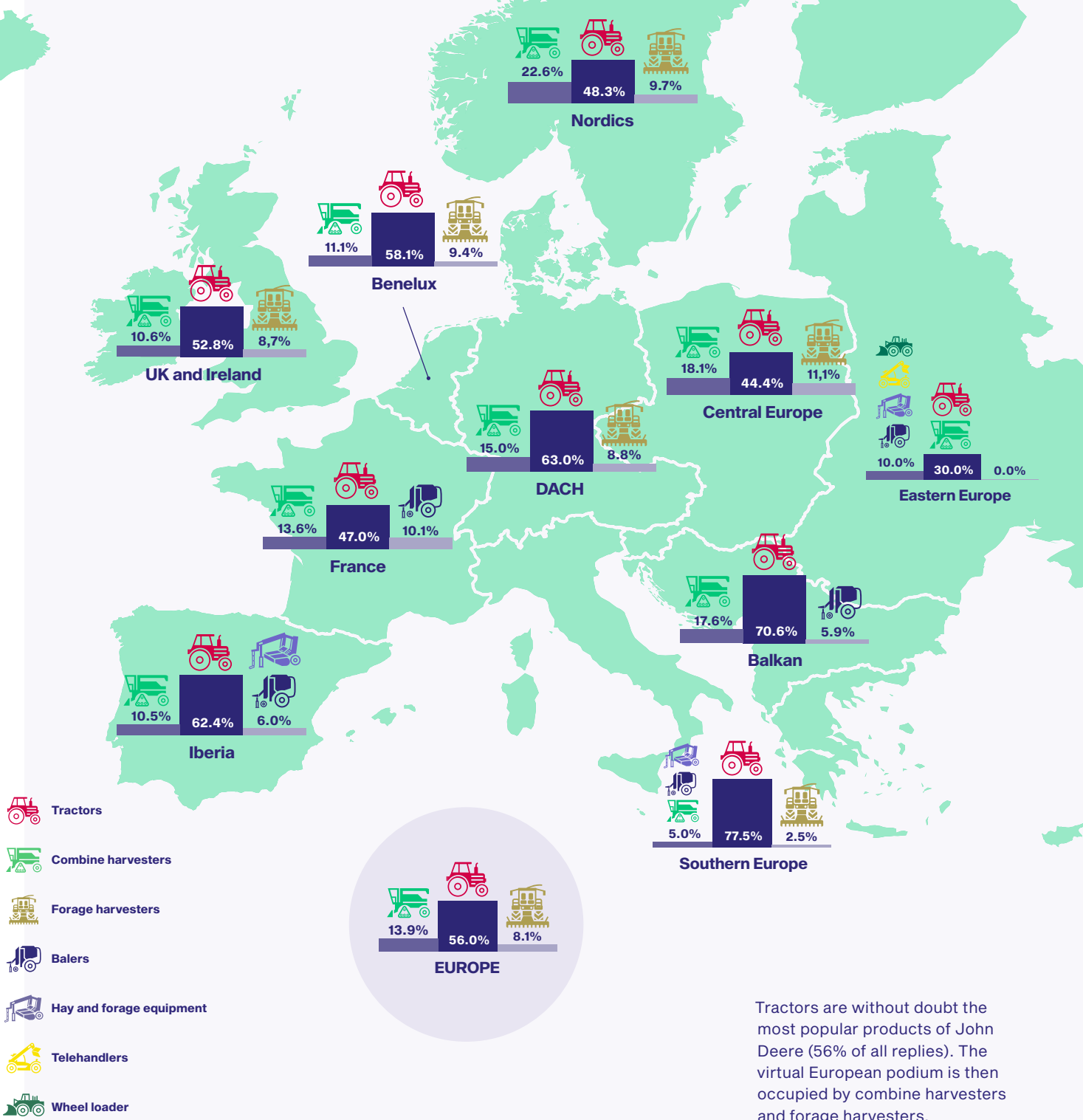
ℹ️ **Results for this question are part of the premium report.**

We have the full package waiting for you, just let us know.

DETAILED BRAND REPORT

John Deere

6

What machine type do you consider to be the best product of this brand?

Nordics
22.6% | 48.3% | 9.7%

Benelux
11.1% | 58.1% | 9.4%

UK and Ireland
10.6% | 52.8% | 8,7%

Central Europe
18.1% | 44.4% | 11,1%

DACH
15.0% | 63.0% | 8.8%

Eastern Europe
10.0% | 30.0% | 0.0%

France
13.6% | 47.0% | 10.1%

Balkan
17.6% | 70.6% | 5.9%

Iberia
10.5% | 62.4% | 6.0%

Southern Europe
5.0% | 77.5% | 2.5%

EUROPE
13.9% | 56.0% | 8.1%

Legend:
- Tractors
- Combine harvesters
- Forage harvesters
- Balers
- Hay and forage equipment
- Telehandlers
- Wheel loader
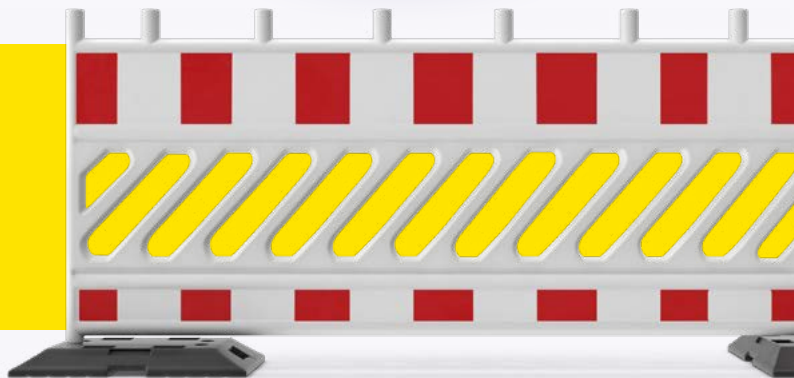
Tractors are without doubt the most popular products of John Deere (56% of all replies). The virtual European podium is then occupied by combine harvesters and forage harvesters.

John Deere

6 What machine type do you consider to be the best product of this brand?

	1	2	3
Austria	?	?	?
Belgium	?	?	?
France	?	?	?
Germany	?	?	?
Italy	?	?	?
Netherlands	?	?	?
Poland	?	?	?
Spain	?	?	?
United Kingdom	?	?	?

Tractors

Combine harvesters

Forage harvesters

Balers

Hay and forage equipment

Telehandlers

Wheel loader

?

Canada

?

United States

A bit different result is visible in Canada where ▮▮▮▮▮▮▮ ▮▮▮▮▮▮▮▮▮▮▮ and ▮▮▮▮▮▮▮▮▮▮▮ best products. Survey respondents from the United States admire ▮▮▮▮▮▮▮▮▮▮ and ▮▮▮▮▮▮▮▮.

John Deere

7 Which brand providing the same/similar kind of service/product would you rate better?

VISIT THE SHOP

i Results for this question are part of the premium report.

We have the full package waiting for you, just let us know.
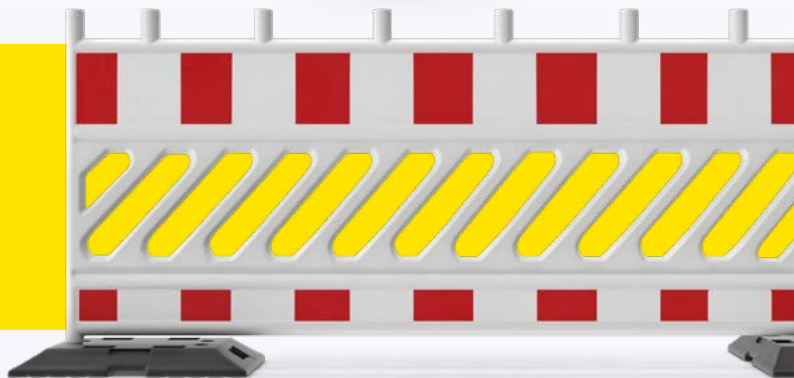
John Deere

8 **Please share a few things the brand you are currently evaluating can do better:**

VISIT THE SHOP

i Results for this question are part of the premium report.

We have the full package waiting for you, just let us know.

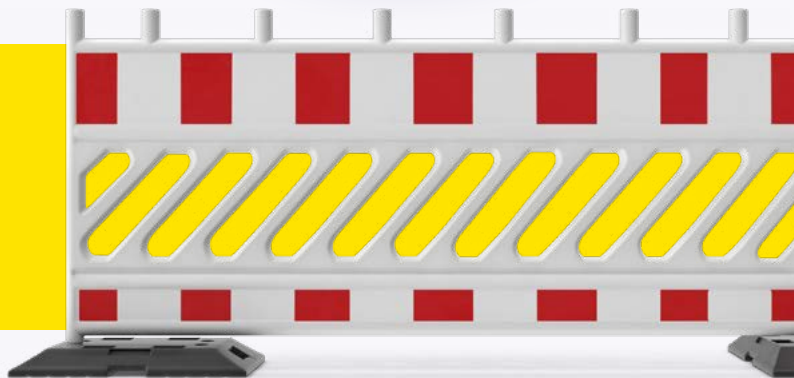# Would you like to discover even more insights on your brand?

The premium versions include the following questions questions and the corresponding results:

- How would you rate this brand in general?

- How likely are you to recommend this brand to a friend or a colleague?

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

- From your point of view, how visible is this brand in the media?

- In which type of media is the brand more visible?

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

- What machine type do you consider to be the best product of this brand?

- Which brand providing the same/similar kind of service/product would you rate better?

- Please share a few things the brand you are currently evaluating can do better.

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