Ag Dealer's Perceptions of Tractor Brands

September 2020 Report

Contents...

“Increasingly, manufacturers are adopting a stronger leadership position with dealers, we are feeling less like partners – we are in this together.”

“We need to step up & strengthen our digital marketing, especially our social media skills in-house, we need to seek inspiration and ideas used in other sectors – Food & Drink, Cars etc.”

Introduction...

In this year's report, Shaun Cooper, TAP's Strategic Head of Insights and Ollie Belt, examine the changes in service dealer perceptions of tractor brands, their performance compared to our first study in 2019 and their response to COVID-19. This year a number of social distancing measures disrupted our industry; Customers have been searching for new ways to engage with dealerships and are trying to make sense of how the measures will affect their business. As a result, more and more are consuming evermore digital content and utilising social media as we spend increased time at home buying products.

Following last year's research into tractor brand perceptions and considering the feedback collected from some manufacturers, we decided to extend our survey to examine performance too. Effective brand and customer-experience performance is essential to any marketing programme, especially as we adjust to a 'new normal' world. Marketers that get marketing performance right become formidable, competitive machines!

The following report explores brand perceptions and the impact of COVID-19 on service dealers, how they are responding and potential changes around how they want to engage manufacturers over the coming months. So, what is the role of digital marketing and technology at this time and how should tractor brands take advantage?

The market research was undertaken through Service Dealer Magazine and highlights the opinions of 63 ag sevice dealer businesses in the UK (8.5% of the 750 ag dealers in Service Dealer's Audience). In addition to the survey, 15 respondents were contacted via a phone call to qualify their responses.

Agriculture Service Dealers Continue to Grow

Above all, the pandemic has demonstrated the faith and confidence service dealer's continue to have in their businesses. 60% of Service dealers cite their businesses are growing, with only 10% reporting a decline. This is surprising given the wider impact Covid-19 is having on the economy.

Talking to a service dealer after the survey - **"although footfall to the dealership dropped, our service dept. continues to be extremely busy and digital marketing & engagement is now critical to sales."**

Marketing More Dependent on Technology & Social Media

Nearly two-thirds of Service dealerships cite social media as being the most important marketing activity to influence sales of tractors; it is engaging customers while most traditional forms of marketing are no longer available. In a separate study by Global Web Index, almost 1 in 2 customers say they've been spending longer on social media since the lockdown, which is only strengthening the grip on this marketing channel.

With almost all scheduled agricultural and machinery events cancelled for the remainder of year, dealers are informing us 'it makes sense to consider different technology platforms such as Zoom, Teams, Webinars, Digital Tools and Learning Hubs to stream live events and share digital content.'

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A Bit About TAP & Service Dealer...

Service Dealer Magazine

Service Dealer is the only business to business magazine targeting dealers in the garden machinery, professional turfcare, farm machinery and outdoor power equipment industries. The magazine was founded in 1988 and is widely regarded as the voice of the industry.

As well as our ongoing commitment to keeping the industry informed, we've recently launched the **Service Dealer Digital Toolkit**; a platform which provides dealers with the tools & guidance necessary to successfully boost their online business presence.

www.servicedealer.co.uk

TAP

As you know, the agricultural sector is a core TAP specialism, and our experience runs broad and deep. Among other things:

- We've launched Nuseed into Eastern Europe making it the third most popular sunflower seed supplier
- We've won **Best Rural Communications Agency** for 2019/20
- We're working with ADAMA Global to launch a global sales & marketing academy designed to change their sales and leadership culture

What's more, working with Service Dealer, TurfPro and Garden Trader, our brand-building resources are second-to-none in the sector. We work across the entire supply chain from growers to influencers to manufacturers and consumers.

We're sure you're in a place of transition given the impact of COVID-19 has had and having your marketing and sales function. That's why TAP's understanding of the supply chain couldn't be more pertinent too.

We see change as a huge opportunity for any strong brand, so we've built our entire creative and strategic offering around helping clients take advantage of the opportunities change brings.

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A Summary of 2019's Report...

Our first survey last year into brand perceptions and the market revealed a few insights that confirmed some of our assumptions, such as customers being more cautious and market savvy. Brands such as Fendt, John Deere, Kubota and New Holland scored particularly high and positive on the attributes 'Innovation' and 'Quality'. These were brand characteristics most strongly associated with driving brand differentiation in a highly competitive market with many hygiene factors.

The report also highlighted some of the consequences of the Brexit negotiations and general market consolidation taking place by some manufacturers on the size and shape of their dealer networks. Service dealers clearly stated that the 'approach to them' was by the far the most important consideration on which brands to stock at their dealership, an issue we examine in more detail in this year's report.

When we examined the marketing function, the local name and reputation were most influential in driving footfall into the dealership, followed by the tractor brand stocked.

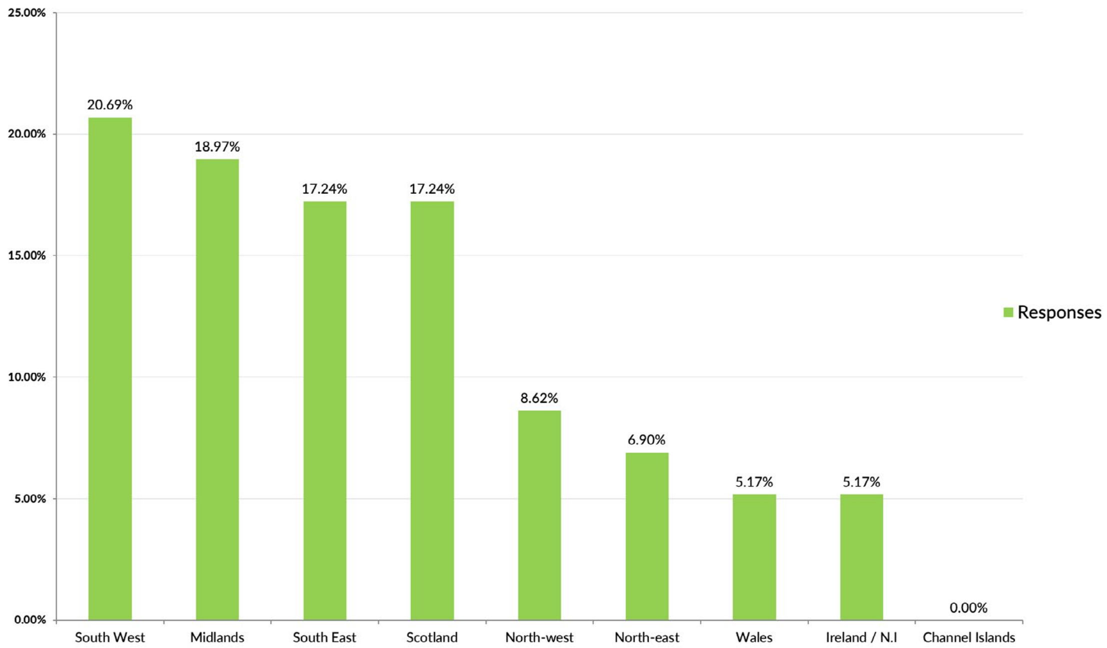
If you'd like to view & download 2019's report, you can do so by clicking here.

Our sample....

Where are dealers located?

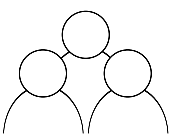
The market research was undertaken in March 2020 and we achieved 63 interviews with ag service dealers across the UK. Almost 1 in 3 interviews were conducted with owners. The majority of the sample were aged between 35 and 54 years old and besides 2 respondents, were male.

We achieved a good geographical spread of ag service dealers across most regions of the UK.



How big are dealerships?

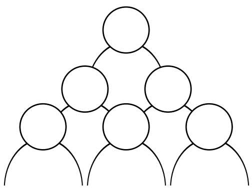
Over half of dealerships who accepted our invitation to complete the questionnaire were defined as being large – employing more than 16 people. These were located across the UK and typically stocked John Deere and Kubota.



Small dealership

(employs less than 5 people)

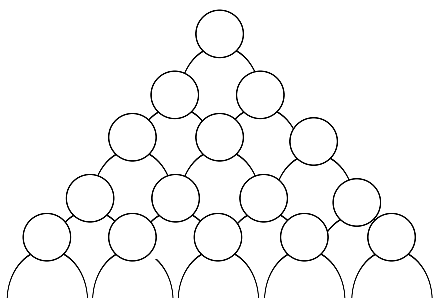
12.07%



Medium size dealership

(employs 6-15 people)

32.76%



Large size dealership

(employs more than 16 people)

55.17%

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Tractor brands stocked by dealers...

	2019	2020
Kubota	27.78%	33.33%
John Deere	9.26%	22.81%
Massey Ferguson	1.85%	15.79%
Fendt	3.70%	14.04%
New Holland Agriculture	5.56%	12.28%
Case IH Agriculture	1.85%	12.28%
McCormick	5.56%	8.77%
Valtra	1.85%	8.77%
SDF Farming Technology. Since 1927.	--	7.02%
JCB	1.85%	3.51%
Landini	--	1.75%
CAT	--	1.75%
Iseki	3.70%	1.75%
Shibaura	--	1.75%
OTHER BRANDS	22.22%	1.75%
Claas	11.11%	--

Please note that the above percentages are shown only to reflect the stocking split between the dealers featured in our survey.
This is not a reflection of brand market share or market penetration.

How do dealers describe their business over the past 12 months?

Most ag service dealers reported that the overall business was growing, with only 10% stating a decline. At the time of the fieldwork, the dealers were aware of Covid-19 and a few were making preparations to service customers should a lockdown come into force.

Growing
59.57%

No change
29.79%

Declining
10.64%

"Apart from a few weeks at the start of the lockdown, when we were adapting to a changing situation, we have responded well. Some staff felt uncomfortable working due to some underlying health problems, but our servicing customers have appreciated the level of support we've maintained."

South-West Dealer

Emergence of Robotic Technology...

There are a few concerns with the emergence of robotic technology. The majority of ag service dealers view this area as an opportunity however, especially amongst larger size Dealerships.

Opportunity
56%

Don't know
30%

Very concerned
14%

Engaging manufacturers with new techniques...

Service Dealer undertook an additional survey back in May exploring the level of interest the audience have in engaging manufacturers in new techniques. 88% of the sample are interested in 'online product demos' and everyone is interested in a 'free digital learning hub offering training'.

Clearly digital communications is the main form of engagement with service dealers at the expense of traditional face-to-face meetings.

	Interested	Not interested
Online product demonstrations by individual manufacturers	88%	12%
Free digital learning hub offering training modules	100%	--
Video conference presentations	51%	49%
Virtual trade show where multiple manufacturers display new products	44%	56%

Brand Performance...

Only a few tractor or agricultural machine manufacturers are prepared to review and examine their brand's specific strengths and weaknesses objectively. Having spoken to a few manufacturers about last year's results, we found a few were aware of one or two areas where their brand excels or requires further support. However, the majority found it difficult to identify all the areas that drives brand performance – unsurprisingly, given the amount of data, research and analytics available and the complexity of combining them to explain how they're affecting the brand.

Working with Service Dealer Magazine and discussing the results with service dealers, we are developing a framework that will enable manufacturers to score their brand's performance for each area. This year is our first attempt, but in the coming years, we aim to refine and extend the criteria.

The report card will help brands identify areas that need improvement, highlight where the brand is strong or weak, and more importantly, their differentiation. To allow us to identify the areas and construct a 2020 report card, we invited service dealers and manufacturers to suggest the vital characteristics for us to measure.

Ahead of reporting back on each brand's performance in these areas, we have compiled a list, ranking each brand based on their 'total performance score' (TPS). You will notice from the table below that you can compare TPS stockists against advocates. Naturally, all of the advocate scores are higher, any score below 80 requires further investigation to understand which areas are keeping TPS lower than desirable.

Tractor Brand Manufacturers	TPS Stockists	TPS Advocates
John Deere	69.6	83.8
Kubota	64.7	80.3
Fendt	73.4	73.6
JCB	58.3	--
Massey Ferguson	52.3	73.6
New Holland Agriculture	60.7	72.9
Case IH Agriculture	77.8	83.3
Valtra	64.2	--
McCormick	74.2	77.1
CAT	79.2	--
Landini	87.5	--
SDF	60.4	--

Developing a strong and resilient brand during these challenging times involves service dealers, customers, media functions and manufacturers to all pull in the same direction, but is unlikely to be the case, all the time.

Some manufacturers are exploring ways of integrating marketing, sales and customer support more effectively – **"Most dealers are independent, responsive and care hugely about our customers, but some manufacturers are losing their human touch, relying too much on IT systems and processes."**

We hope our findings encourage debate on which areas service dealers would like to see improvements and where you have advantages over competitors.

The scores provided by brand advocates (recommendations), clearly outline one or two areas that score significantly lower than most areas that scored highly, thereby providing brands with their priorities.

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The Brands Were Evaluated by Service Dealers Across 6 Key Areas

Reviewing each brand's reputation and perception, we asked each ag service dealer to rate the following attributes on a 5-point scale:

1. Training support from the tractor manufacturer
2. Marketing support from the tractor manufacturer
3. Value for money
4. Tractor innovation
5. Product quality
6. Tractor manufacturer after-sales / service ease

Top 6 Ag Tractor Brands: As rated by Ag Dealers

1 Fendt

Overall Score

4.03

Quality: 4.5
Innovation: 4.4
Value for Money: 3.5
Aftersales Support: 4.0
Training Support: 3.8
Marketing Support: 3.9

2 John Deere

Overall Score

3.99

Quality: 4.1
Innovation: 4.3
Value for Money: 3.2
Aftersales Support: 4.2
Training Support: 4.0
Marketing Support: 4.1

3 Kubota

Overall Score

3.81

Quality: 3.9
Innovation: 3.5
Value for Money: 3.9
Aftersales Support: 4.0
Training Support: 4.0
Marketing Support: 3.6

4 Massey Ferguson

Overall Score

3.68

Quality: 3.9
Innovation: 3.8
Value for Money: 3.3
Aftersales Support: 3.7
Training Support: 3.6
Marketing Support: 3.7

5 JCB

Overall Score

3.60

Quality: 3.7
Innovation: 3.8
Value for Money: 3.2
Aftersales Support: 3.6
Training Support: 3.7
Marketing Support: 3.6

6 CASE IH

Overall Score

3.53

Quality: 3.6
Innovation: 3.6
Value for Money: 3.4
Aftersales Support: 3.4
Training Support: 3.6
Marketing Support: 3.6

The Top Performing ‘Challenger’ Brands:

Whilst the brands below didn’t make it into the top 6, these are definitely brands to watch over the coming years.

7 Valtra

Overall Score

3.52

Quality: 3.8
Innovation: 3.8
Value for Money: 3.2
Aftersales Support: 3.4
Training Support: 3.5
Marketing Support: 3.4

8 New Holland

Overall Score

3.50

Quality: 3.4
Innovation: 3.6
Value for Money: 3.4
Aftersales Support: 3.5
Training Support: 3.6
Marketing Support: 3.6

9 CLAAS

Overall Score

3.41

Quality: 3.2
Innovation: 3.4
Value for Money: 3.1
Aftersales Support: 3.4
Training Support: 3.6
Marketing Support: 3.7

10 CAT

Overall Score

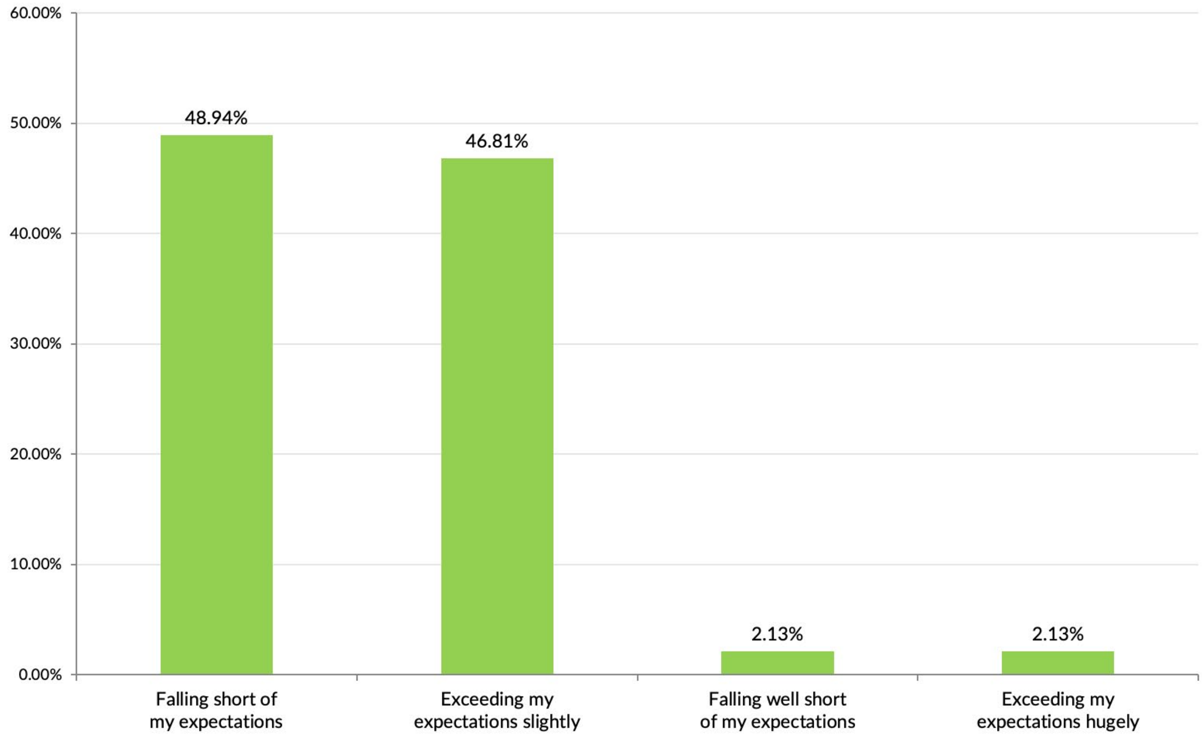
3.28

Quality: 3.4
Innovation: 3.3
Value for Money: 3.2
Aftersales Support: 3.3
Training Support: 3.3
Marketing Support: 3.3

Marketing Effectiveness

Subsequent conversations with ag service dealers after completing our survey, revealed every Dealer Principal wanted to know what marketing works and only a few use digital marketing analytics to help determine which campaigns are most effective. Those dealers who felt the marketing fell short of their expectations, said it revolved around **"a lack of creative ideas or innovation when promoting their tractors – we'd like to see our products in different scenarios."**

Overall, the census is that manufacturers rely too heavily on the colour of the tractor to differentiate themselves, rather than trying to create ways to disrupt the market norms of the sector. Whereas, those ag service dealers who feel the marketing slightly exceed their expectations cited digital tool kits, marketing training and the strong reputation of the brand **- "X manufacturer has been growing their brand profile over recent years, meaning more customers are talking about their tractors."**



In line with 2019, brand reputation and social media continue to be the most popular types of marketing / sales activities used by ag service dealers. Social media is now synonymous with digital marketing and is constantly evolving as customer conversations change from one month to next. What worked a few months ago, may not necessarily work today.

"Sometimes it feels like the manufacturers are reacting to stories or the news media, rather than setting the agenda or social conversation."

North-West Dealer

It is more important than ever before that tractor manufacturer marketers understand and stay ahead of the latest social media trends. Doing so ensures the ag service dealer has the right tools at their disposal, an evolving strategy and possesses the required skills to maximise the benefits of social media.

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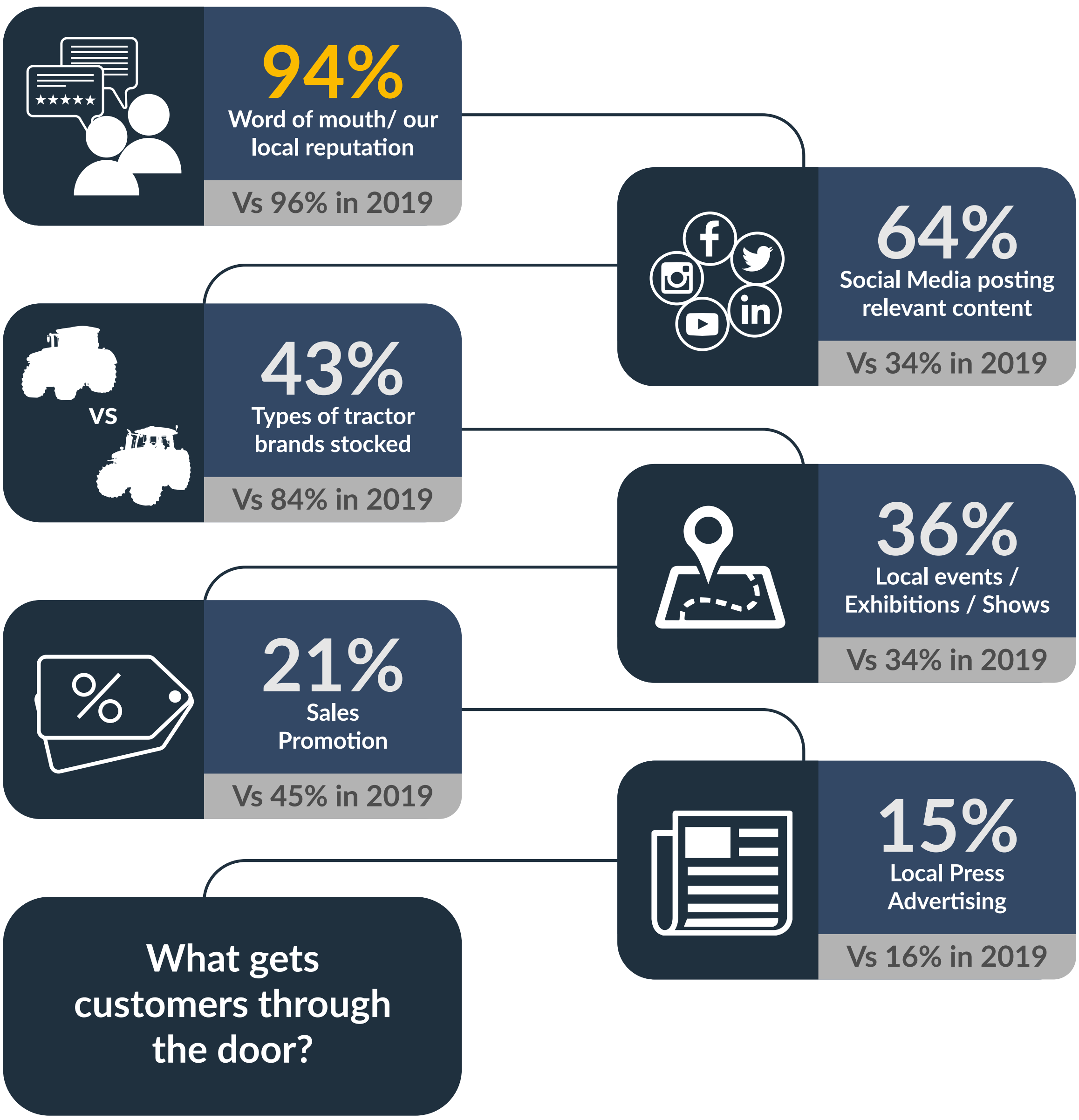
Bringing Customers Through the Door

Carried forward from 2019, 2020's results reaffirm that 'word of mouth and reputation' is still the most important reason customers visit the ag service Dealer.

- Reputation is the No.1 way to improve trust with customers
- Ag service dealers revealed online reviews are becoming increasingly important to promote trust in both their servicing operation and equipment sales
- The opposing risk is negative reviews, but most ag service dealers are better equipped to address them
- Progressively, new customers are coming to the dealer via 'recommended by farmer or customer'

Social media / digital marketing is the second most important influence on visiting the dealership. Today's world of consumerism is digitally based and interconnected, which makes social media a major priority within the fundamentally important sales & marketing activities. Poor social media and ag content directly reflects upon the people, the range of products, the level of innovation and servicing as offered by the business as a whole.



Insights

Dialogues with ag service dealers who rated the importance of 'social media posting relevant content' highly, offered a few insights that contribute to the success of their marketing and sales activities.

1. Invite customers to post reviews of their servicing and some key products

Proactively request customers to share reviews and provide feedback concerning the quality of their servicing team. Encourage customers to mention individual service engineers.

2. Open and honest business

Being transparent and straight-talking to customers demonstrates Service dealers care about their customers – "We are in this together."

3. Focus on one or two social media channels first

In place of spreading resources too thinly, Service dealers selected Facebook, Google Reviews, and Instagram as their preferred social media channels. Demonstrating understanding of what content worked or not.

4. Monitor and understand

Learn from and respond to what customers are sharing about the ag service dealership. Some dealers post real-time comments from customers in their Reception area.

5. Finally, don't ignore modern technology

Although it was not easy to embrace social media initially, the benefits of using social media are revealed by the acquisition of new business - new customers and new purchases.

The Influential Factors for Stocking Consideration

Drawing on our comparison of research results from last year and 2020, there are a few trends appearing, which will have an impact on the UK industry over the coming years. Some of these are understandably as a direct result of Covid-19 - from dealer conferences and events being postponed and cancelled training sessions, to increased reliance on digital communication tools such as Microsoft Teams and Zoom, whilst others emerge from two years of research.

Age of the Video Conference

For the foreseeable future, ag service dealers will not be attending new product demo events or conferences. Video conferencing is the new normal, facilitating manufacturer product launches and demonstrating on a variety of devices. Pitching via digital screen is so different to a face-to-face conversation but can offer so much. It is more flexible, cost efficient and scalable.

"Zoom is enabling us to have more, yes more, face-time with customers and manufacturers."

"Manufacturer X is helping us to better understand Microsoft Teams and improving the speed on resolving issues / problems."

Manufacturer and Service Dealer Partnership at Risk

Having established the most important consideration for ag service dealers is the 'Manufacturer's approach to Dealer', we telephoned a few Principals to qualify why this is such a priority to them.

During previous years, dealers have noticed some strong, established brands are imposing more rules and processes on the business, without any, or much consultation. A few highlighted that the relationship is no longer mutual or a sustainable partnership.

Most expressed the issue as an inherent management attitude that often remains with people after they've resigned from one manufacturer and joined another, perhaps with a lower brand profile.

"We want the benefits of a strong partnership allowing us to exchange information, to reduce inefficiencies and coordinate better decisions."

"Some senior managers' attitudes are becoming too dictatorial - my way is the only way."

Northern Dealer

Stocking Considerations Evaluated

For two years, our surveys have found 'manufacturer's approach to dealers' is the most important stocking consideration provided by respondents. Some of the other stocking considerations vary, but No.1 priority is how the business relationship is managed and developed.

Some ag service dealers are questioning the longer-term commitment to a partnership that should be encouraging them to invest in further improvements and cooperate to resolve problems that benefit the end customer. As we know already, most of the dealers are established family businesses (multi-layered generations) selling multiple brands across a wide range of products – they know what works. No longer does it make sense to increase the number of tractors on show because dealers cannot rely on the flow of business resulting from parts and servicing, as service intervals are longer and tractors are increasingly reliable.

Farm equipment dealers are mostly family concerns that work hard to establish a personal and close rapport with their customers. They also sell a lot of different kit, besides tractors. One in five dealerships list 42 leading brands across ag, turfcare, forestry, off-road and automotive.

Advancements in technology should be supporting these goals, but dealers mentioned concerns that manufacturers are either planning to extend - increase the number of independent dealers - within their network or reduce them to a few large dominating regional players, without allowing much feedback from them. A recent article in the Service Dealer Magazine, titled 'The Franchise Jigsaw' reported as much. In addition, our follow-up telephone interviews captured some disturbing feedback on structural changes and attitudes towards some dealers.

"Mutual trust is no longer a given. The relationship is one more like a parent / child".

"They're forgetting the name of the business above the door."

North-East Dealer

"Things have been changing for a while, some thought it would pass by without affecting their business. However, our tractor manufacturer is adopting a similar attitude and approach."

Welsh Dealer

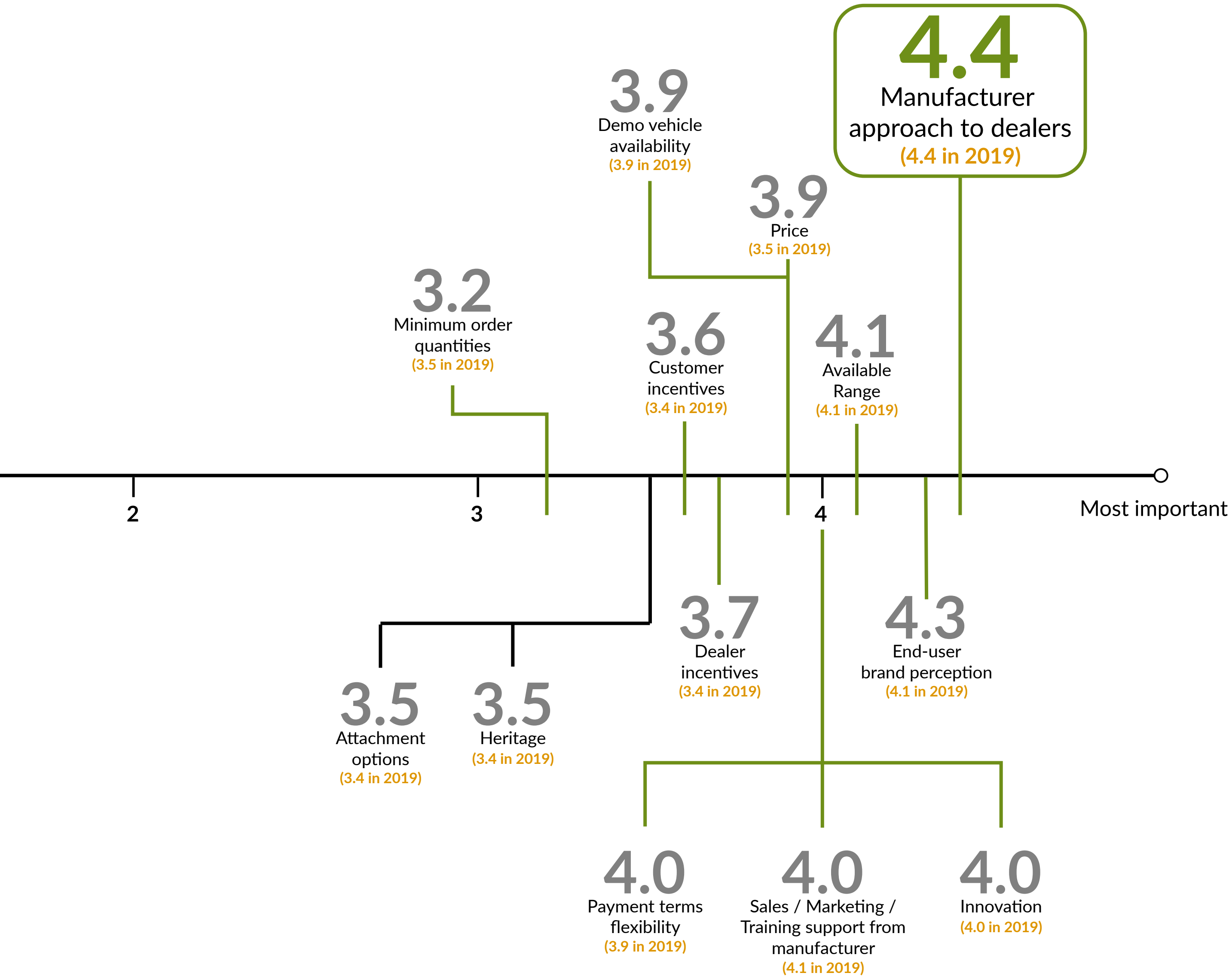
"In twenty years, there will only be super-dealers and mobile technical software teams working directly for one manufacturer. I don't think my children will have a career like me in our family business."

Stocking Considerations Dealer Scores

When ag service dealers review and select tractor brands to stock or sell, they typically apply 'stocking criteria' which helps them differentiate one manufacturer from another, reflecting what is important to them as a business. These factors will guide their final decision.

Noticeably, some of the values are functional such as; price, payment terms, innovation and minimum order levels, whilst other elements are more emotional – like 'make it easier to do business' – i.e. demo support, manufacturer's approach, to enhance relationships between parties etc.

For tractor manufacturers, understanding dealers and their customers, in terms of the service and support they require, as well as their product needs, is critical for safeguarding relationships.



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Customer Brand Perceptions Matter

Once a farmer or consumer formulates a perception of a tractor brand, whether positive or negative, it is hard to change their attitude towards the product. Ag service dealers challenge and reaffirm perceptions everyday with their interactions with customers on what they 'hear, see and engage with'. Dealers cited new product / innovation, product quality, goodwill, reliability and word of mouth from people working within the dealership as contributing most to end-user perceptions.

"No single characteristic influences brand perception, all of these play into the brand / product's successful perception."

Northern Dealer

You'd be forgiven for thinking that price is the greatest determining factor when choosing a brand to stock or sell, however the 'Manufacturer's Approach to Dealers' is most important, with 85% of the dealers we surveyed (of a total of 63), giving it a score of 4 or higher, where 1 equals least important to 5 being most important / critical.

When we review differences between 2019 and 2020, there are a few changes, most notably the increase in 'End-user brand perceptions' from 78% to 93% and the percentage declines with the other considerations.

Considerations to stock	2020	2019
End-user brand perceptions	93%	78%
Manufacturers approach to dealers	86%	88%
Available range	86%	86%
Price	84%	50%
Demo vehicle availability	81%	73%
Sales / Marketing & training support	79%	85%
Innovation	79%	85%
Payment terms flexibility	77%	85%
Dealer incentives	72%	49%
Customer incentives	60%	51%
Heritage	58%	47%
Attachment options	58%	49%
Mimimum order quantities	40%	54%

Conclusions...

Our report represents the initial impact of Covid-19 and builds on the results of the 2019 study, helping us to develop a 'Performance Brand Index'.

The following points are our interpretation and opinion regarding the results of the 2020 Service Dealer Survey. Moving forward, tractor manufacturer brands and ag service dealers naturally need to consider these points.

The conclusions from our second survey cannot ignore the disruption caused by the global Coronavirus pandemic and subsequent impending challenges over the next 6-18 months as the UK recovers and begins to adapt to a post-Brexit economy. In some instances, it is going to be difficult to be able to plan ahead and predict every scenario, but our results suggest there are some brand performance areas, for a collection of manufacturers, that require attention and more generally, how they approach service dealers.

After reviewing the performance ratings for all the manufacturing brands, there are a few trends overall that service dealers regard as being strengths and weaknesses. Apart from a few tractor manufacturers, there was little change between 2019 and 2020 brand performance scores.

It should be noted that the brands who scored highly for **tractor innovation** and **product quality**, were slightly penalised with a lower score for **value for money**. Therefore, there was little evidence to suggest service dealers fully recognise the price premium for brands offering higher product quality or tractor innovation, an area we intend to explore over the coming months.

Areas requiring improvement are **'Value for Money', 'Marketing Support'** and **'Training Support',** which will close the gap between Stockists and Advocates. It is important to note that not every stockist recommends the brand stocked.

Strengths	Weaknesses
1. Tractor Innovation	1. Value for Money
2. Product Quality	2. Marketing Support
3. Aftersales / Ease of service	3. Training Support

When our research was undertaken a majority of UK dealers (60%) were positive and reported growth, with only 10% stating they were in decline. Although the economic outlook remains uncertain, our telephone interviews reinforced a real sense of genuine confidence that service dealers will withstand the short-term challenges and expect existing customers to continue current spending levels. This was based on past experiences, having a loyal customer base and a strong tractor / machinery servicing offering.

To assist manufacturer's understanding of the spectrum of service dealer buying priorities, we have discovered that they prioritise '**manufacturer's approach to dealers**' and '**end-user perceptions**'. Interestingly, end-user perceptions experienced an increase in importance from 2019 to 2020.

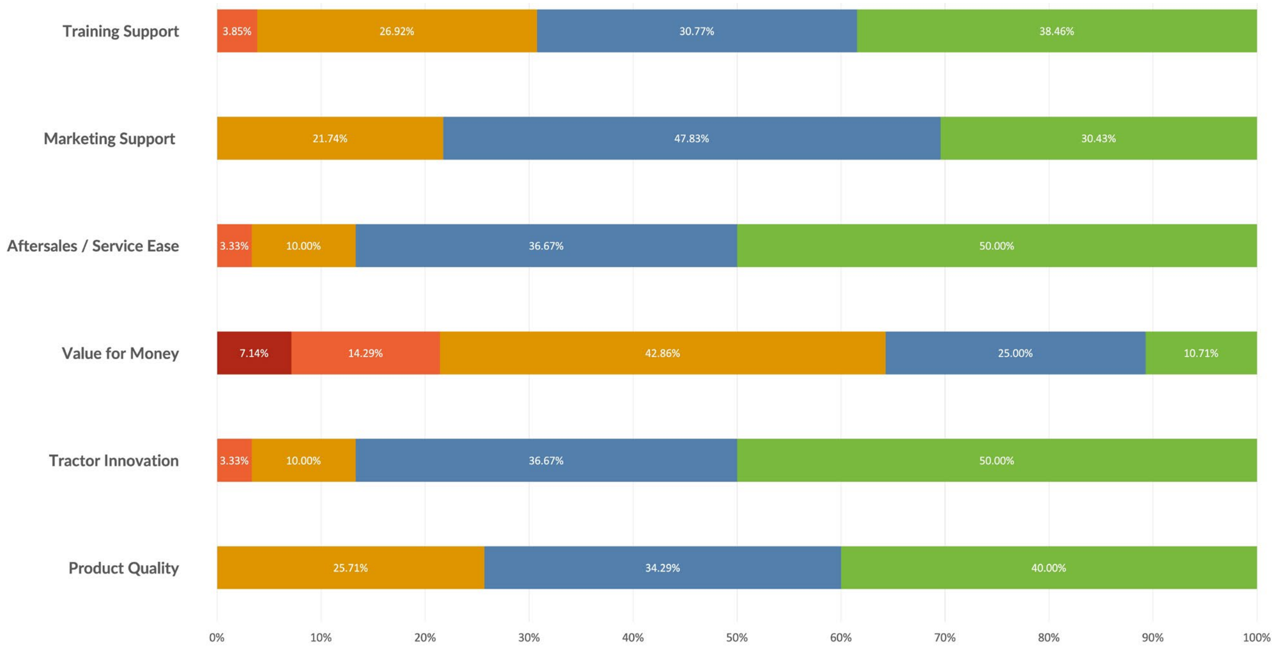
Word of mouth recommendation and reputation are still the most important reasons why customers visit their preferred service dealer. WOM marketing is an area most service dealers encourage customers to give reviews and share their positive experiences on social media. This is especially effective as farmers are comfortable recommending products and services to each other. As a result, 'word-of-mouth marketing' works best when customers have something new to share and talk about, especially new technology or innovation with a new tractor. We call this the 'talking point', which is no different to successful social media conversations.

From our research it is evident that their is a desire amongst service dealers to understand and use social media more effectively to raise their local reputation. In addition to this, we discovered that service dealers who have seen have their business grow in the past 12 months also see social media as one of the most important aspects of bringing customers through their dealership doors.

Brand Performance

Both aftersales, service ease and tractor innovation are strong positive brand attributes for John Deere, whilst marketing and training areas could be stronger, but value for money is one brand value holding back a higher overall score. We were surprised to see 26% of service dealers provide an average rating for product quality, something we intend explore.

Brand Performance Score Breakdown



Brand Performance Index Score

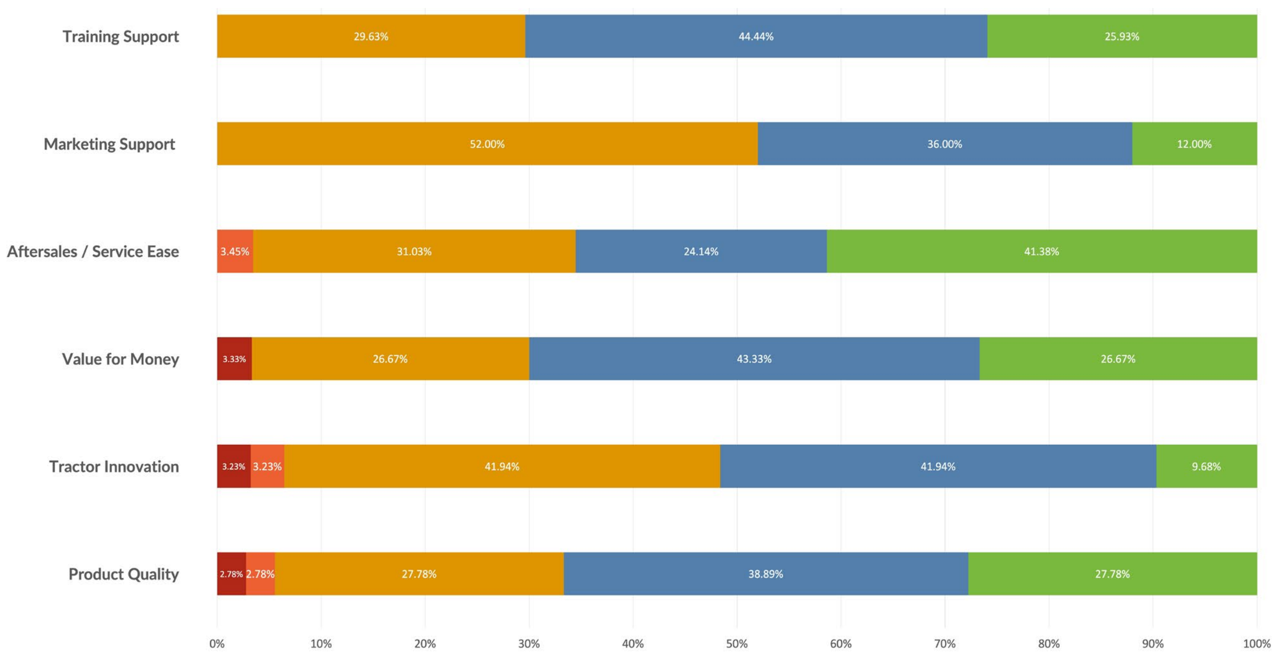
Overall, John Deere is performing very strongly, especially amongst service dealer advocates, which isn't surprising, but their index score for marketing and value for money suggests the brand requires improvement. Talking to dealers, they would like to see more creative innovation in terms of how the brand / tractors are presented, they are too similar to competitors.

	Familiar	Stockists	Advocates
Training Support	43.9	63.5	80.0
Marketing Support	40.3	55.8	72.5
Value for Money	31.8	59.6	72.5
Tractor Innovation	51.0	80.8	92.5
Product Quality	50.9	88.5	92.5
Aftersales / Service Ease	47.3	69.2	92.5

Kubota Brand Perception

Both training and value for money brand attributes score high for Kubota, whilst tractor innovation and marketing support are specific areas that require improvement, especially when only a small proportion of dealers rate them as excellent.

Brand Perception Score Breakdown



Brand Performance Index Score

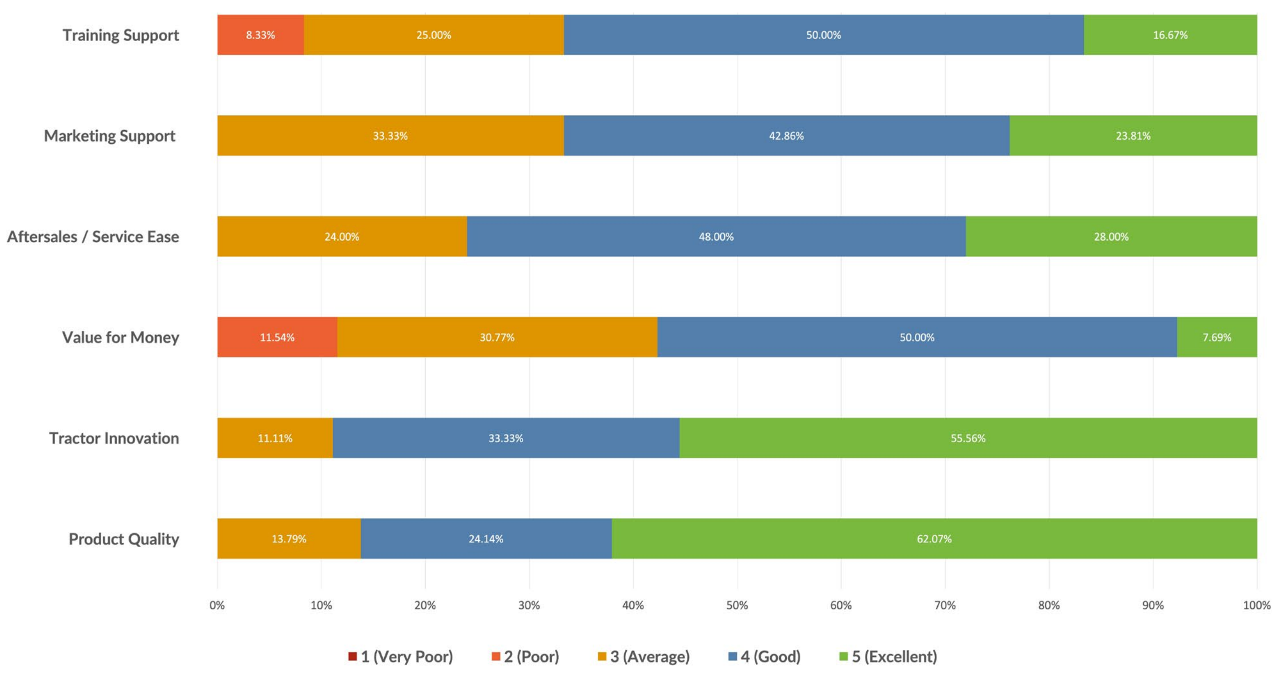
Service dealers rate marketing support and tractor innovation poorly, which are dragging the brand's performance down. However, brand advocacy towards Kubota is driven by value for money, training and servicing. These brand performance attributes could be promoted more strongly by dealer advocates to the rest of the network.

	Familiar	Stockists	Advocates
Training Support	44.4	65.8	86.4
Marketing Support	36.9	52.6	70.5
Value for Money	45.3	68.4	84.1
Tractor Innovation	39.8	59.2	72.7
Product Quality	47.7	68.4	79.5
Aftersales / Service Ease	46.8	73.7	88.6

Brand Performance

Fendt scored high for tractor innovation and product quality. They also received the highest number of 'excellent' scores from all the manufacturers researched. Value for money and training support are areas requiring improvement.

Brand Performance Score Breakdown



Brand Performance Index Score

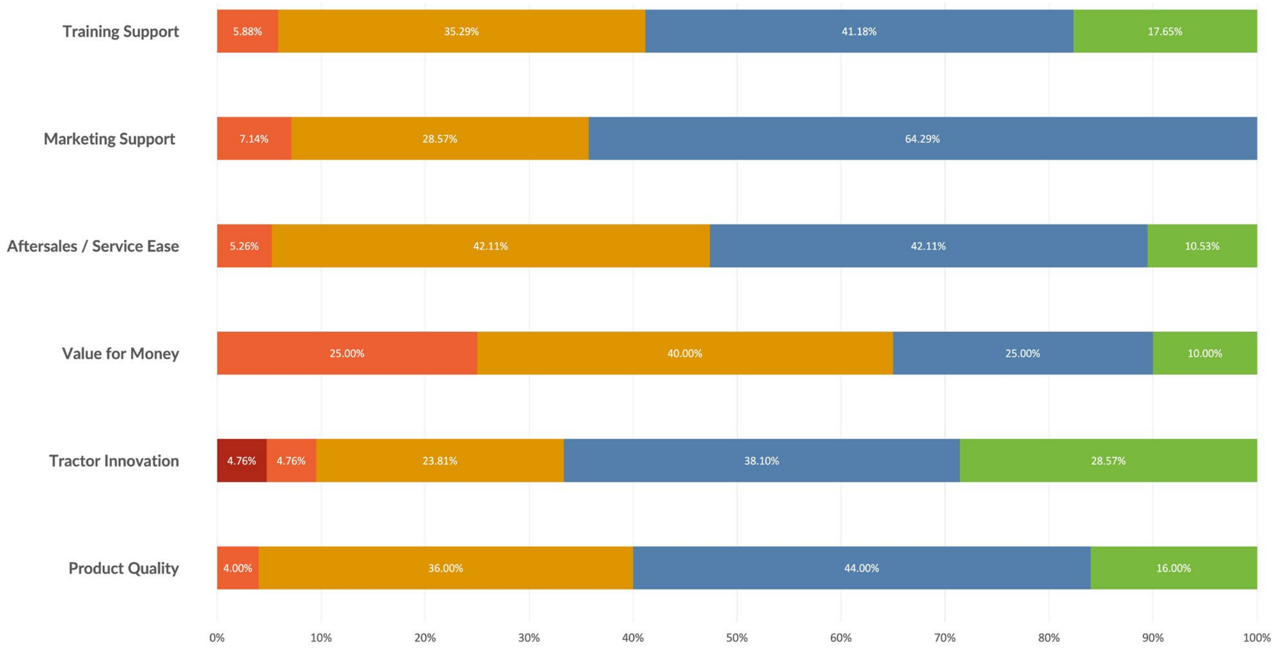
You will notice from scores across the different audiences that marketing support is the one overriding brand performance attribute that requires improvement, followed by training support.

	Familiar	Stockists	Advocates
Training Support	36.7	65.6	75.0
Marketing Support	34.7	50.0	58.3
Value for Money	34.4	71.9	66.7
Tractor Innovation	47.4	87.5	83.3
Product Quality	46.8	90.6	91.7
Aftersales / Service Ease	40.4	75.0	66.7

Brand Performance

Similar to Fendt, both tractor innovation and product quality brand attributes score most highly for JCB, although value for money is an area affecting brand performance.

Brand Performance Score Breakdown



Brand Performance Index Score

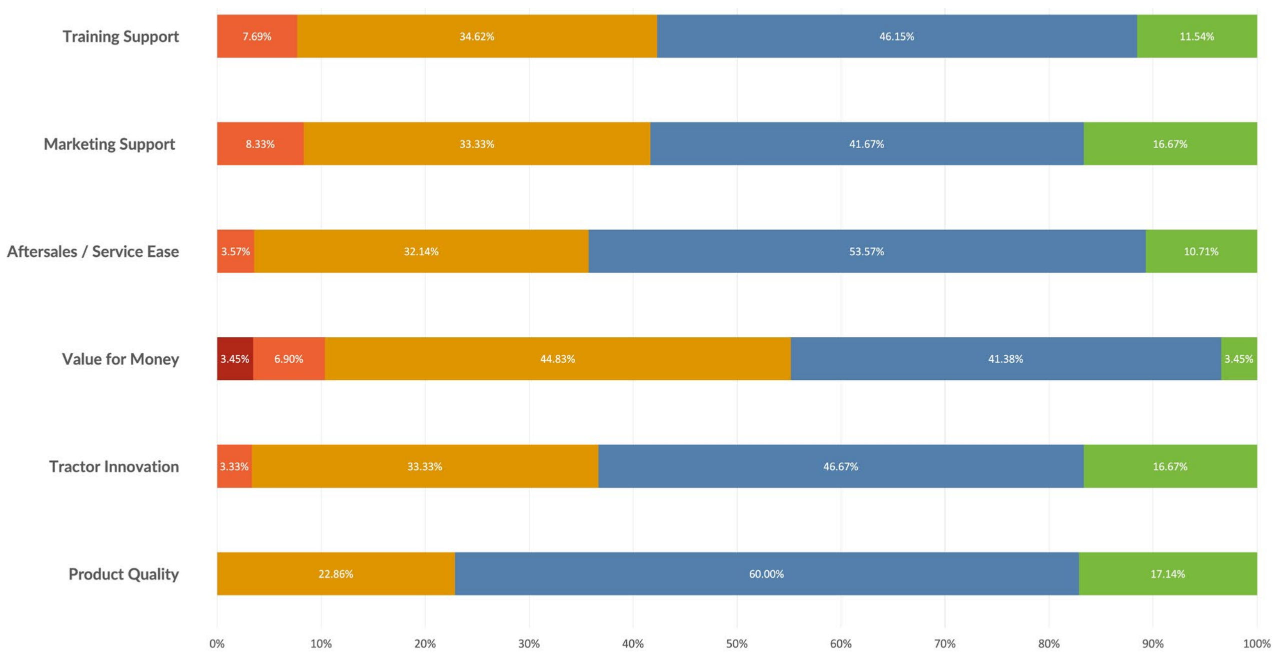
Those Service dealers that are familiar of JCB (not stockists or advocates) score the brand poorly, across all attributes. It is worth noting that there were no JCB advocates interviewed in the survey however.

	Familiar	Stockists	Advocates
Training Support	25.6	50.0	-
Marketing Support	20.5	50.0	-
Value for Money	22.9	50.0	-
Tractor Innovation	30.1	75.0	-
Product Quality	31.5	75.0	-
Aftersales / Service Ease	26.1	50.0	-

Brand Performance

As one of the original agricultural brands, with a long and rich history, it is unsurprising that Massey Ferguson scored high for innovation and product quality.

Brand Performance Score Breakdown



Brand Performance Index Score

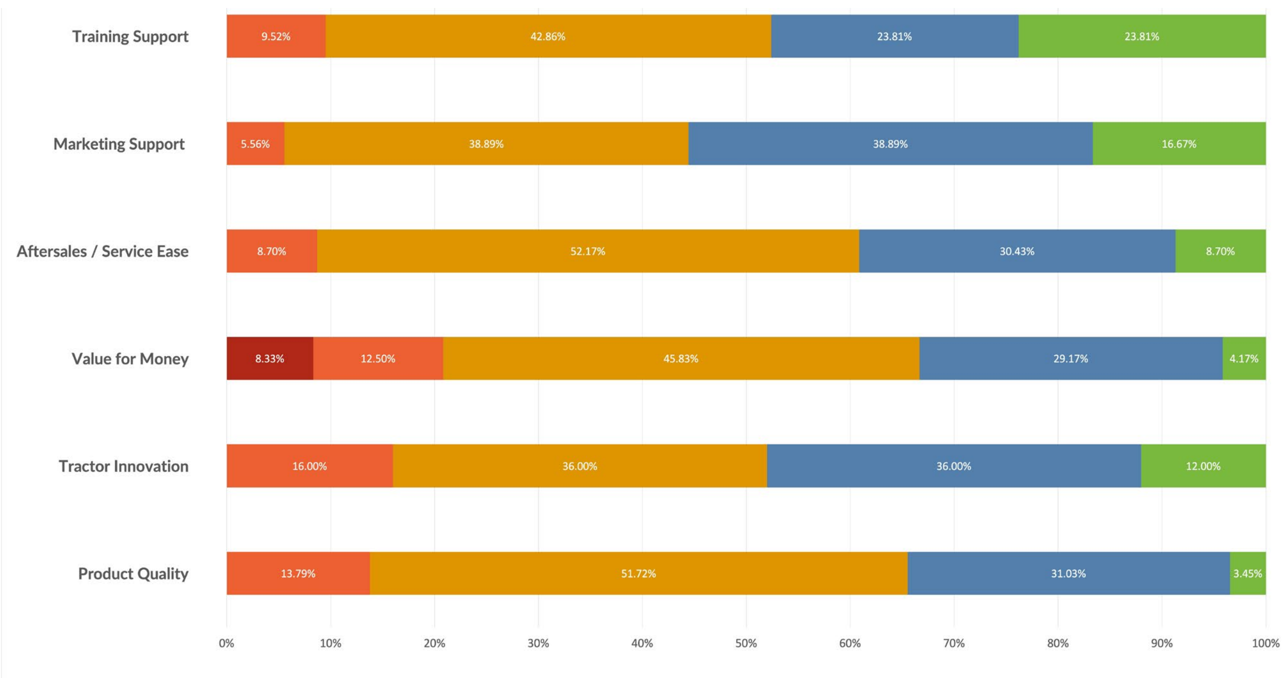
Having reviewed the performance scores across all the attributes and audience types, clearly marketing support is an area that requires attention and further consideration from the service dealer perspective. However, given the brand's reputation, we would expect advocacy scores to be higher.

	Familiar	Stockists	Advocates
Training Support	37.8	41.7	66.7
Marketing Support	36.4	33.3	75.0
Value for Money	35.4	55.6	75.0
Tractor Innovation	42.3	50.0	66.7
Product Quality	47.7	72.2	83.3
Aftersales / Service Ease	40.4	61.1	75.0

CLAAS Brand Performance

Claas scored well for tractor innovation and marketing support. They received their lowest score for value for money.

Brand Performance Score Breakdown



Brand Performance Index Score

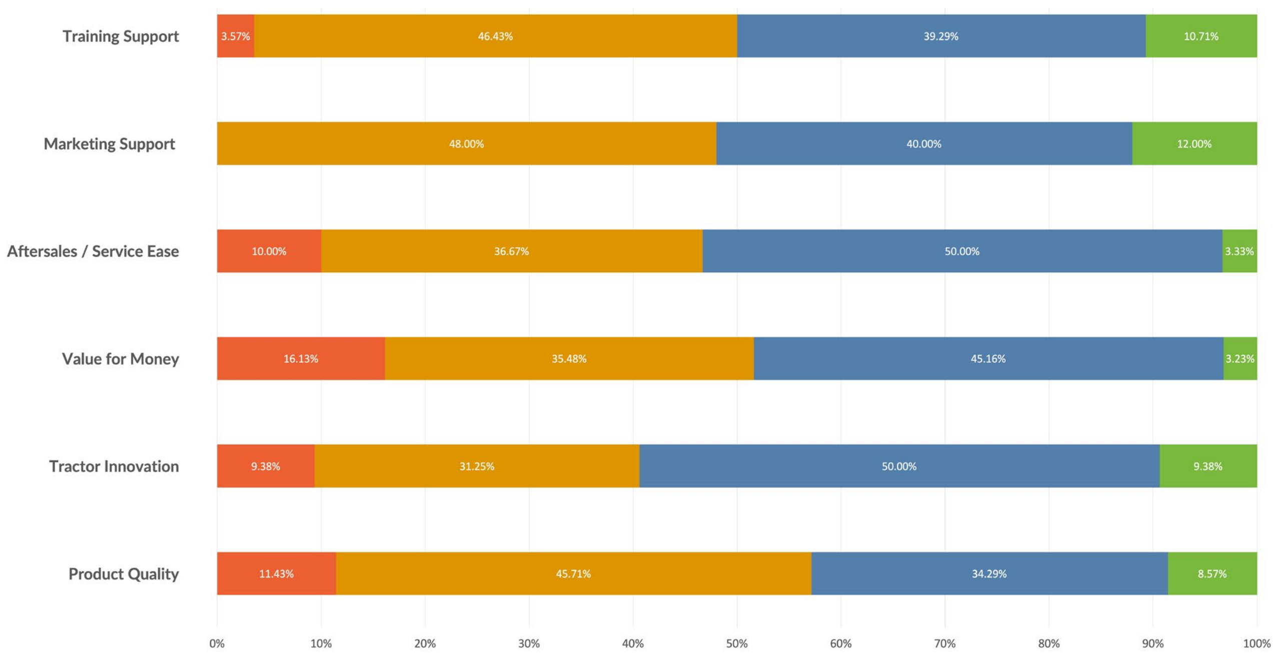
Given the size of the sub-sample for Claas, the performance scores given across all areas should be treated as indicative.

	Familiar	Stockists	Advocates
Training Support	30.6	-	50.0
Marketing Support	27.3	-	75.0
Value for Money	26.0	-	75.0
Tractor Innovation	31.1	-	75.0
Product Quality	30.1	-	50.0
Aftersales / Service Ease	29.3	-	75.0

Brand Performance

New Holland is another brand with a strong and trusted position in the farming industry. Their brand advocates are known as 'True Blue Fans'. Scores across all areas are consistent with each other, with tractor innovation regarded slightly higher than the rest.

Brand Performance Score Breakdown



Brand Performance Index Score

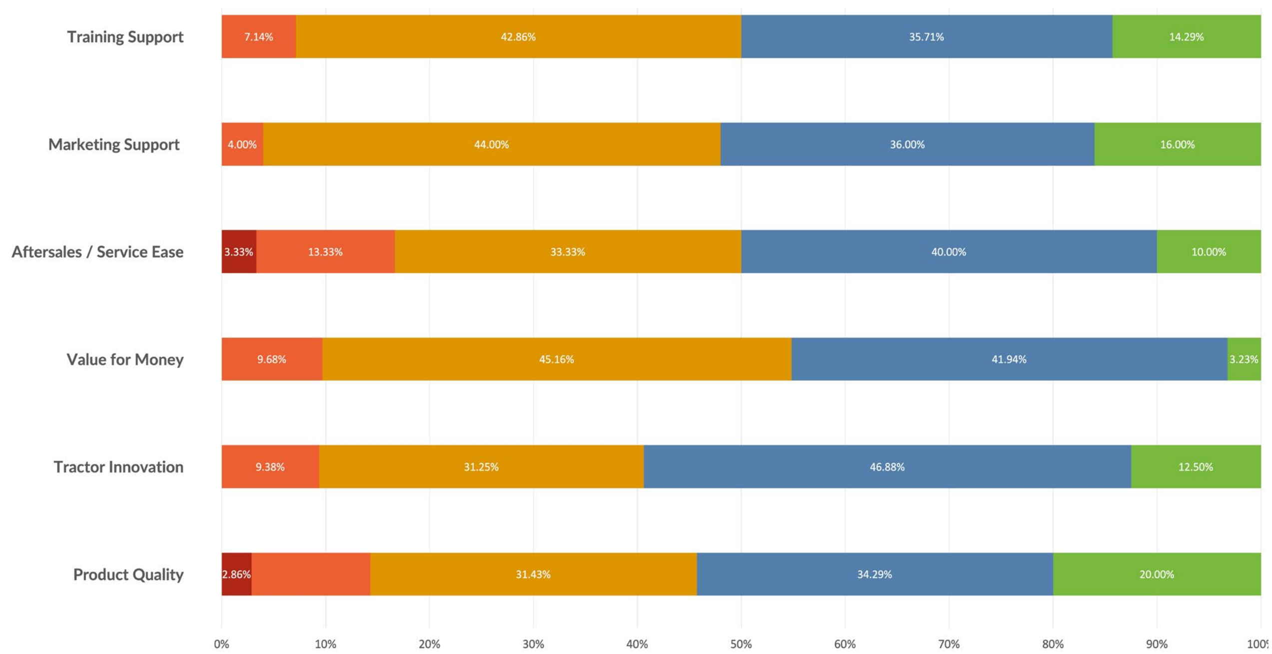
Stockists rated training and marketing support, along with value for money as areas that need improving by New Holland.

	Familiar	Stockists	Advocates
Training Support	40.0	53.6	75.0
Marketing Support	37.5	57.1	68.8
Value for Money	38.5	57.1	68.8
Tractor Innovation	42.3	64.3	75.0
Product Quality	38.9	71.4	75.0
Aftersales / Service Ease	39.4	60.7	75.0

Brand Perception

Tractor innovation rated slightly higher than the other brand attributes, whilst product quality received the most number of excellent-rated scores scores.

Brand Perception Score Breakdown



Brand Performance Index Score

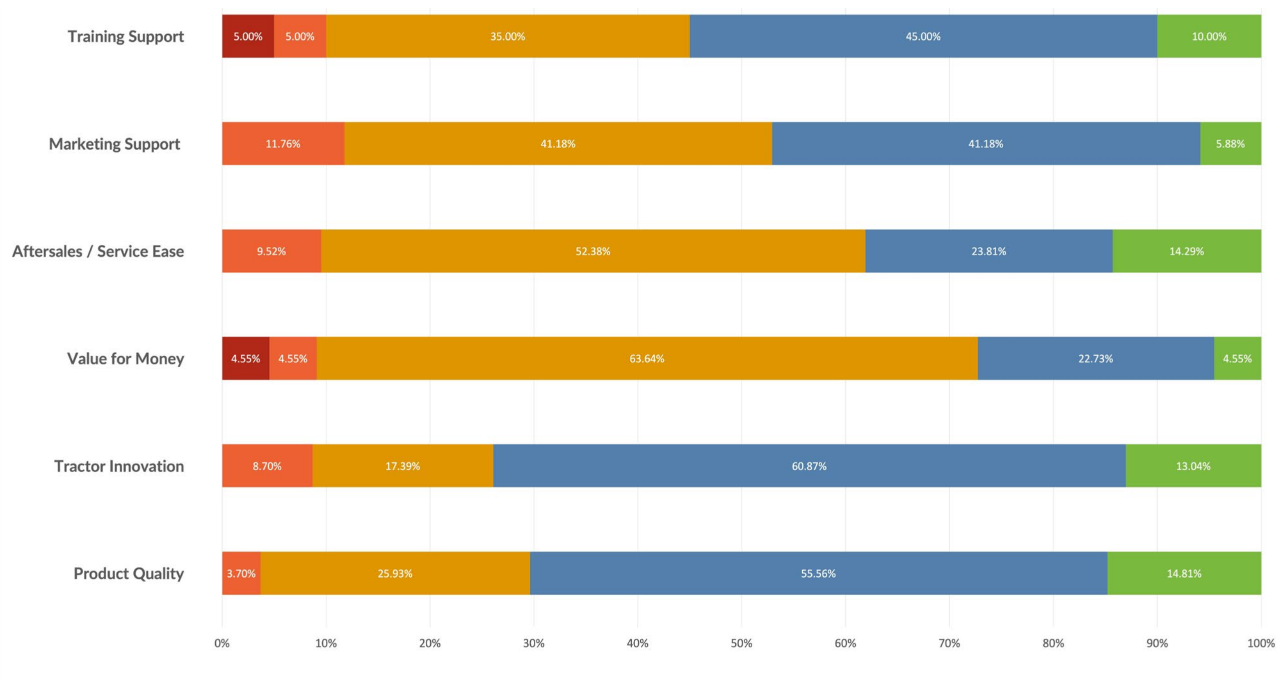
Clearly, tractor innovation along with product quality and aftersales / ease of servicing drives brand advocacy and is why those dealers recommend it.

	Familiar	Stockists	Advocates
Training Support	40.0	75.0	81.3
Marketing Support	37.5	75.0	75.0
Value for Money	38.0	75.0	75.0
Tractor Innovation	42.9	87.5	93.8
Product Quality	41.7	87.5	87.5
Aftersales / Service Ease	38.3	66.7	87.5

Brand Perception

Valtra is highly regarded for its tractor reliability which is reflected in the scores below for product quality and innovation.

Brand Perception Score Breakdown



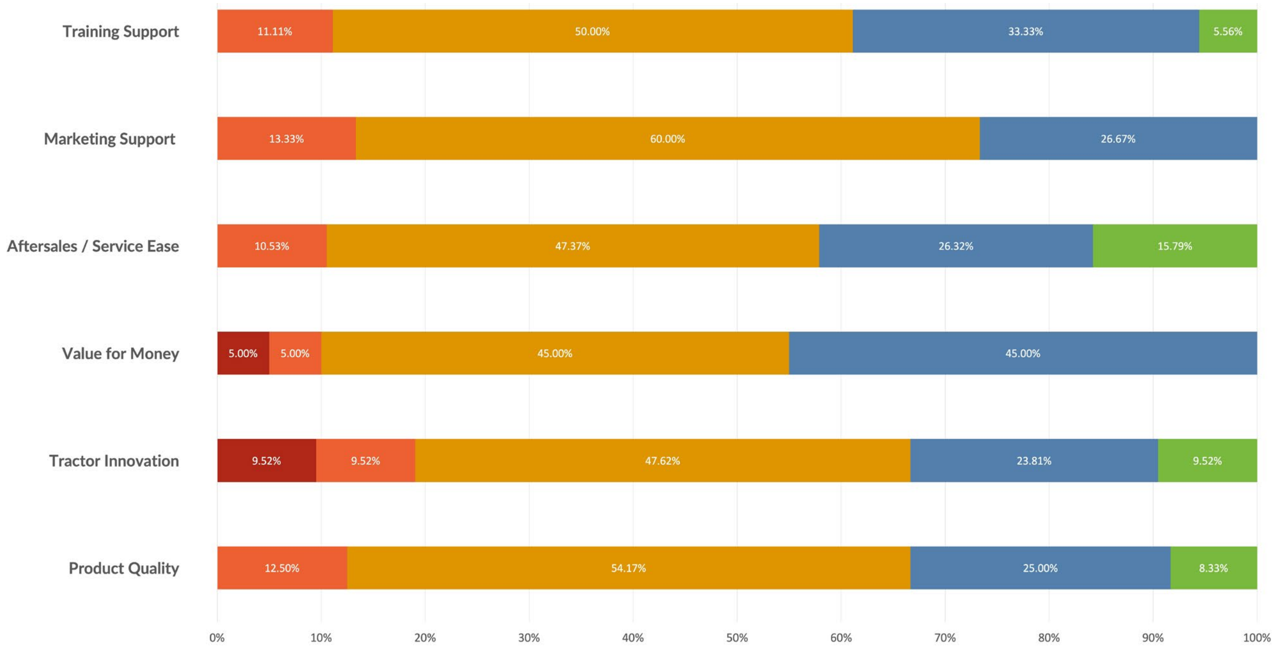
Brand Performance Index Score

Stockists rate the brand for product innovation and quality, however their marketing support is below average.

	Familiar	Stockists	Advocates
Training Support	27.8	65.0	-
Marketing Support	23.3	50.0	-
Value for Money	25.0	65.0	-
Tractor Innovation	32.7	65.0	-
Product Quality	35.2	70.0	-
Aftersales / Service Ease	27.1	70.0	-

Brand Perception

McCormick received a low percentage of high scores across all attributes. The majority of dealers gave this brand an average rating, with marginally lower scores for tractor innovation suggesting that it should focus on innovating its brand identity.



Brand Performance Index Score

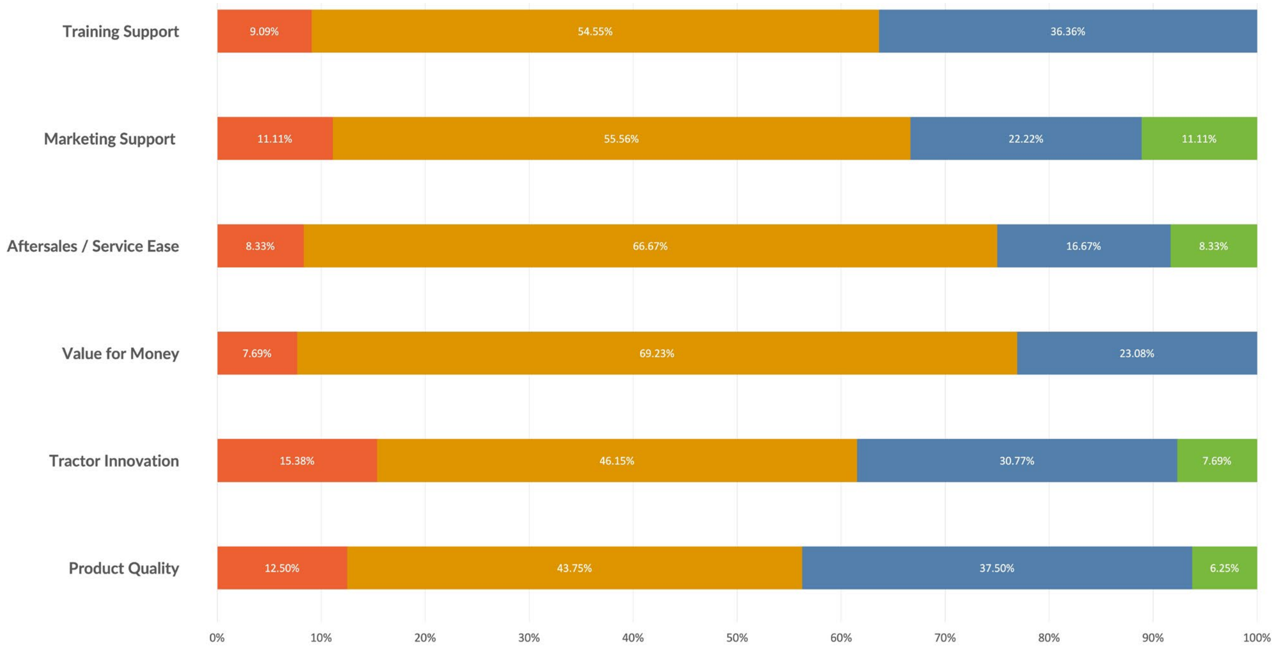
Dealers who a familiar with the brand rated it poorly for all attributes. The higher scores from both stockists and advocates are unsuprising, however it must be noted that there were few McCormick dealers in our sample.

	Familiar	Stockists	Advocates
Training Support	23.3	75.0	81.3
Marketing Support	18.2	55.0	56.3
Value for Money	24.0	70.0	68.8
Tractor Innovation	23.0	80.0	81.3
Product Quality	25.5	85.0	87.5
Aftersales / Service Ease	25.0	80.0	87.5

Brand Perception

Product quality and marketing support are rated as the strongest attributes for CAT. However, our sample size is too small to draw too many insights at this stage.

Brand Perception Score Breakdown



Brand Performance Index Score

Unfortunately, no stockists recommended CAT, so we do not have any ratings listed for advocates. Those respondents familiar with the brand, scored the brand as poor across all performance attributes.

We suggest the brand reviews these scores and potentially explores ways to improve the ratings.

	Familiar	Stockists	Advocates
Training Support	13.9	75.0	-
Marketing Support	11.9	100.0	-
Value for Money	14.6	75.0	-
Tractor Innovation	15.3	75.0	-
Product Quality	17.6	75.0	-
Aftersales / Service Ease	14.4	75.0	-

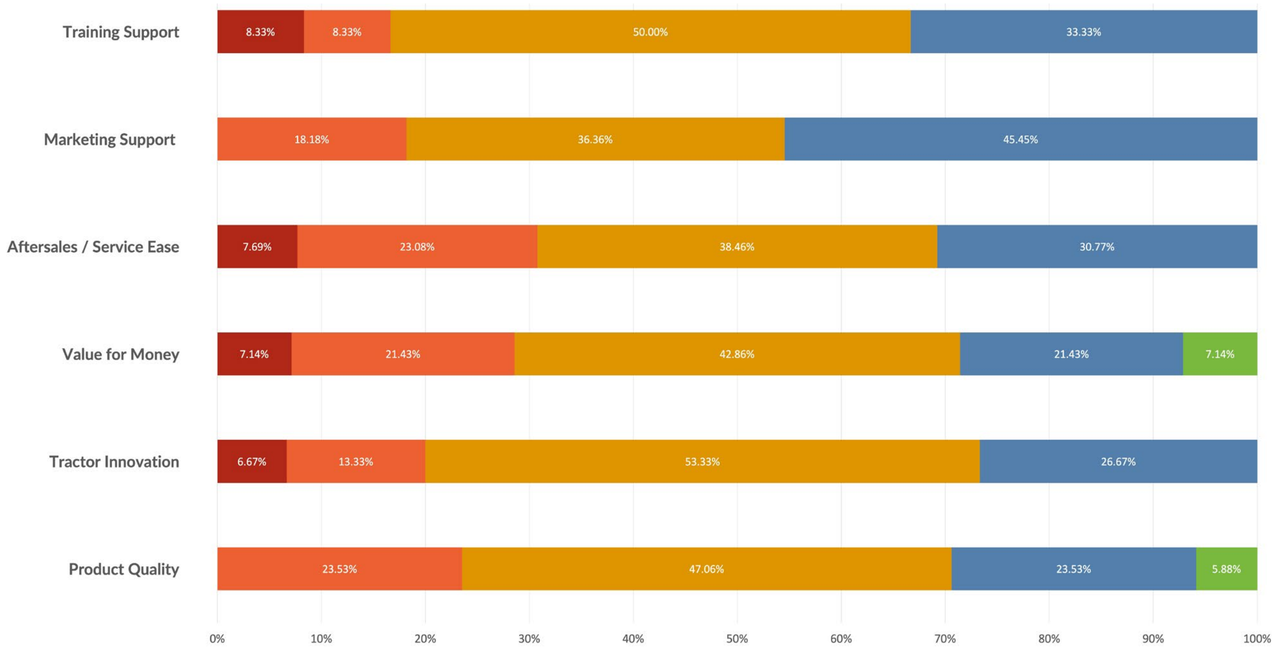
SDF
Farming Technology. Since 1927.

Brand Perception

In our verbal research, SDF were described as being traditional, manufacturing tractors ‘in the old way’.

Only two brand attributes managed to receive an excellent rating which were ‘Value for Money’ and ‘Product Quality’, whilst ‘Marketing Support’ received the highest average score.

Brand Perception Score Breakdown



Brand Performance Index Score

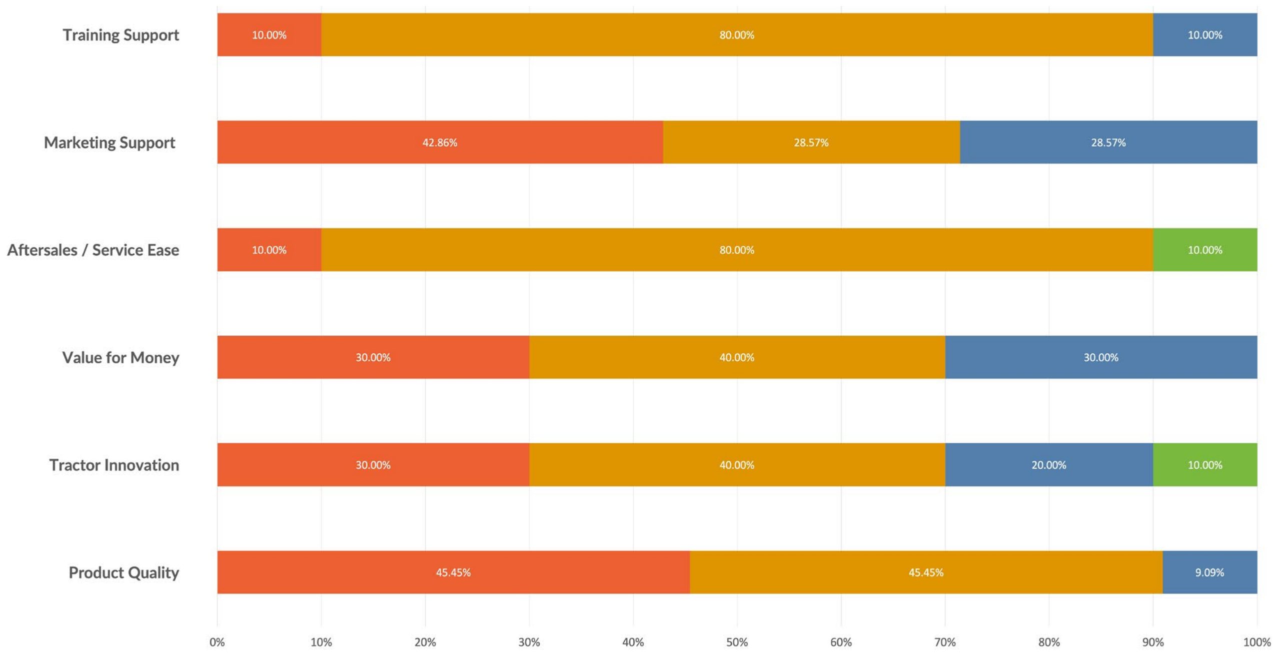
Not surprisingly, the performance index scores from service dealers who are familiar with and stock SDF products, besides product quality and tractor innovation, require improvement and attention. Without us knowing their targets, it is difficult for us to comment on their ratings and which brands we should compare SDF to.

	Familiar	Stockists	Advocates
Training Support	13.9	50.0	-
Marketing Support	14.2	50.0	-
Value for Money	14.6	56.3	-
Tractor Innovation	15.3	75.0	-
Product Quality	16.7	81.3	-
Aftersales / Service Ease	13.3	50.0	-

Brand Perception

Zetor is a fairly new brand to the market, and this is reflected by low levels of brand awareness amongst our survey respondents. Therefore, it is unsuprising that it recieved failry low scores across all attributes.

Brand Perception Score Breakdown



Brand Performance Index Score

The scores below reflect the low levels of brand awareness amongst service dealers. It is also important to note that there were no Zetor stockists or advocates in our sample.

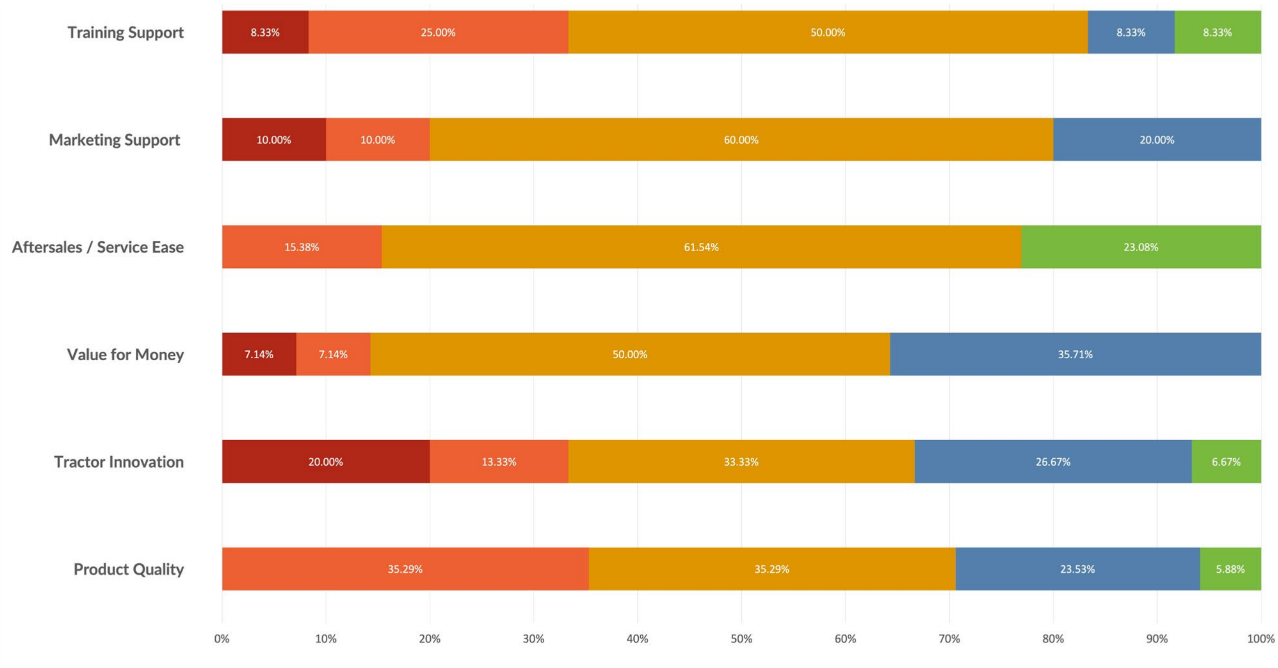
	Familiar	Stockists	Advocates
Training Support	11.1	-	-
Marketing Support	7.4	-	-
Value for Money	10.4	-	-
Tractor Innovation	10.7	-	-
Product Quality	8.3	-	-
Aftersales / Service Ease	11.2	-	-

Landini Brand Perception

A number of service dealers cited Landini as a strong historic tractor brand with values normally associated with any Italian brand, such as beautiful design, high performance engines and product innovation. No negatives were mentioned. However, we are surprised to see innovation generally wasn't rated that highly by UK service dealers.

Overall, the majority of respondents score the brand performance attributes as average, so it is not easy to draw meaningful conclusions.

Brand Perception Score Breakdown



Brand Performance Index Score

Apart from stockists, who provided perfect scores for 'Training Support, Product Quality and Aftersales / Service Ease', the remaining sample who are familiar with Landini scored all attributes as poor and requiring improvement.

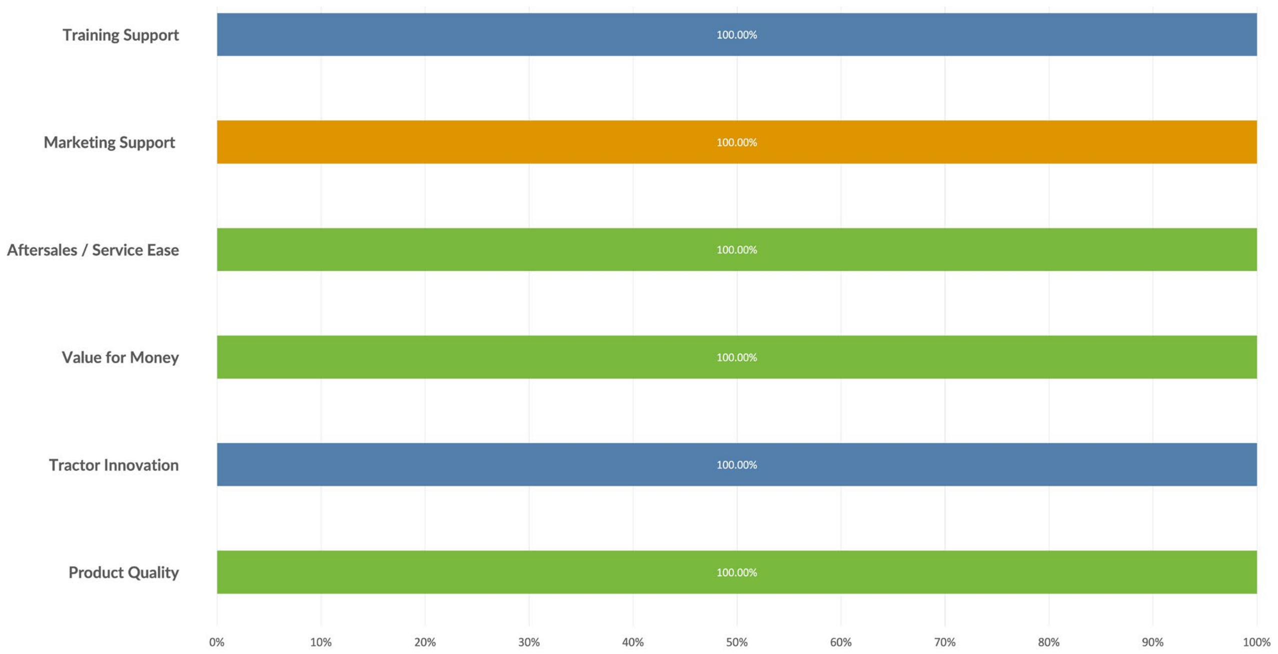
	Familiar	Stockists	Advocates
Training Support	12.2	100.0	-
Marketing Support	10.8	75.0	-
Value for Money	15.6	75.0	-
Tractor Innovation	14.3	75.0	-
Product Quality	15.7	100.0	-
Aftersales / Service Ease	16.0	100.0	-

Other Brands:

SHIBAURA Brand Perception

The sub-sample comprises of one dealer, so we are unable to draw many reliable conclusions from the response. Marketing support is an area for further exploration.

Brand Perception Score Breakdown



Brand Performance Index Score

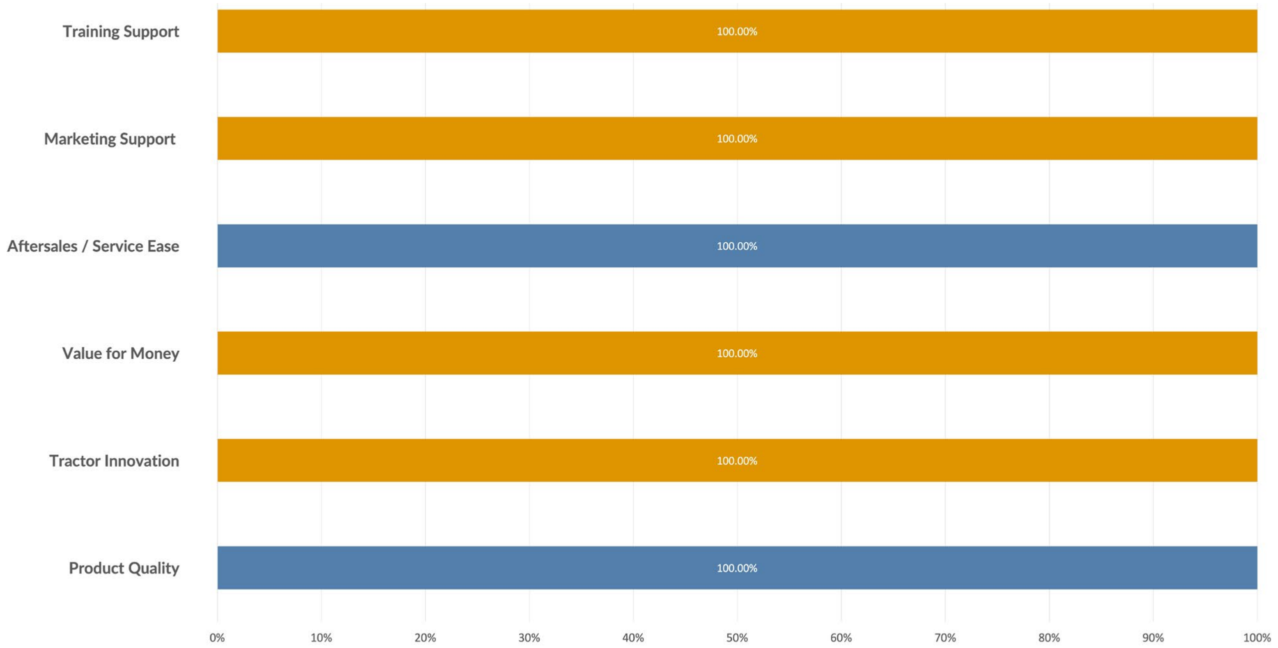
	Familiar	Stockists	Advocates
Training Support	1.6	75.0	75.0
Marketing Support	1.1	50.0	50.0
Value for Money	2.1	100.0	100.0
Tractor Innovation	1.6	75.0	75.0
Product Quality	2.1	100.0	100.0
Aftersales / Service Ease	2.1	100.0	100.0

Other Brands:

ISEKI Brand Perception

Apart from 'Product Quality' and 'After-sales / Service Ease', UK service dealers regard ISEKI as average across the remaining brand attributes. Even when we explore the rating scores in more depth, stockists and advocates do not rate these areas as particularly high either.

Brand Perception Score Breakdown



Brand Performance Index Score

	Familiar	Stockists	Advocates
Training Support	1.1	50.0	50.0
Marketing Support	1.1	50.0	50.0
Value for Money	1.1	50.0	50.0
Tractor Innovation	1.1	50.0	50.0
Product Quality	1.6	75.0	75.0
Aftersales / Service Ease	1.6	75.0	75.0

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