



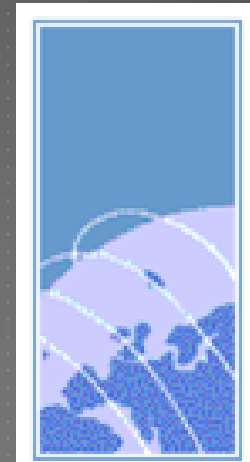
EUROPEAN DEALERS APPRECIATE THEIR TRACTORS OPERATORS

Enquiry 2012

THE SAME INQUIRY IN CLIMMAR



- ▶ 2010 : 5 COUNTRIES
- ▶ 2011 : 7 COUNTRIES
- ▶ 2012 : 7 COUNTRIES



7 COUNTRIES



DENMARK



GERMANY



FRANCE



~~ITALY~~



The NETHERLANDS



POLAND



UK



SWITZERLAND

1095 ANSWERS

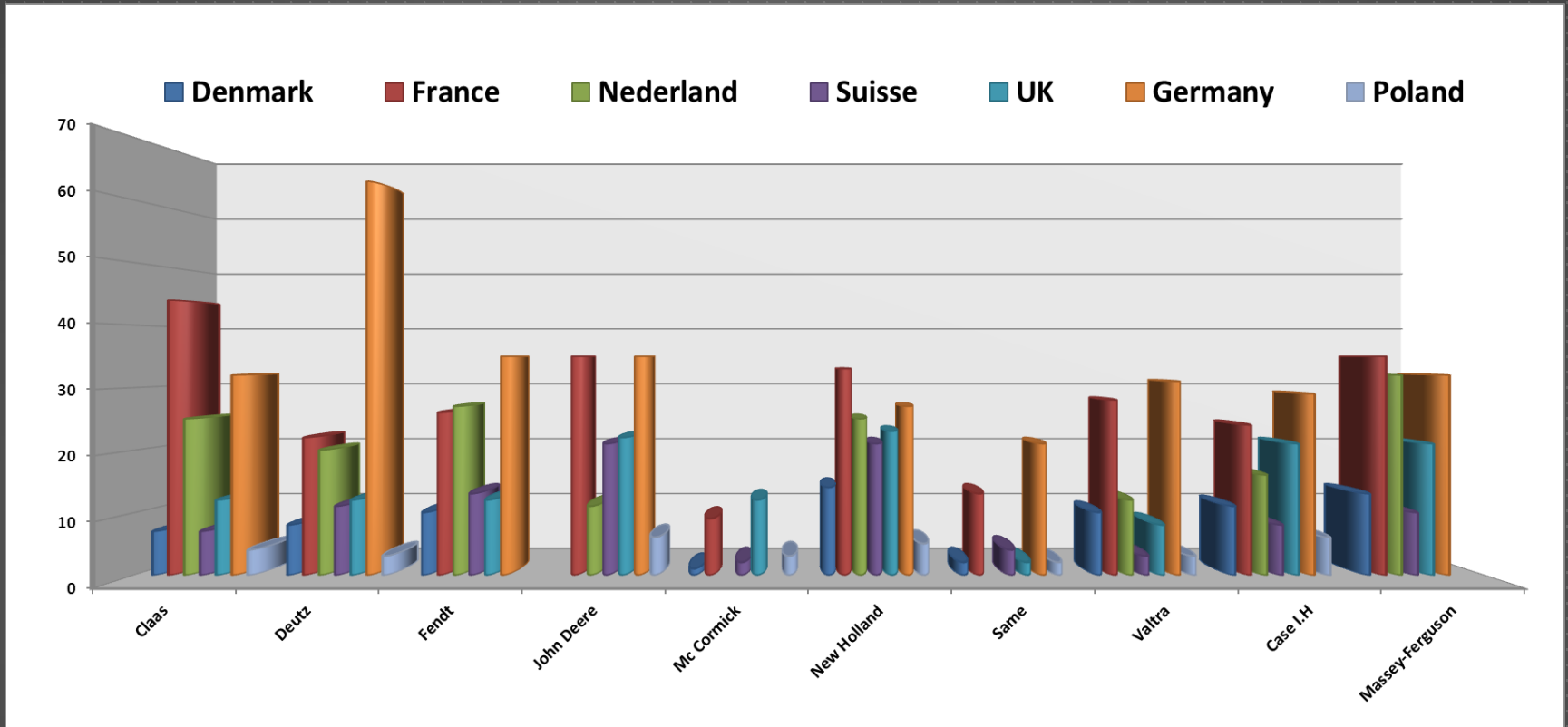
2011

2012

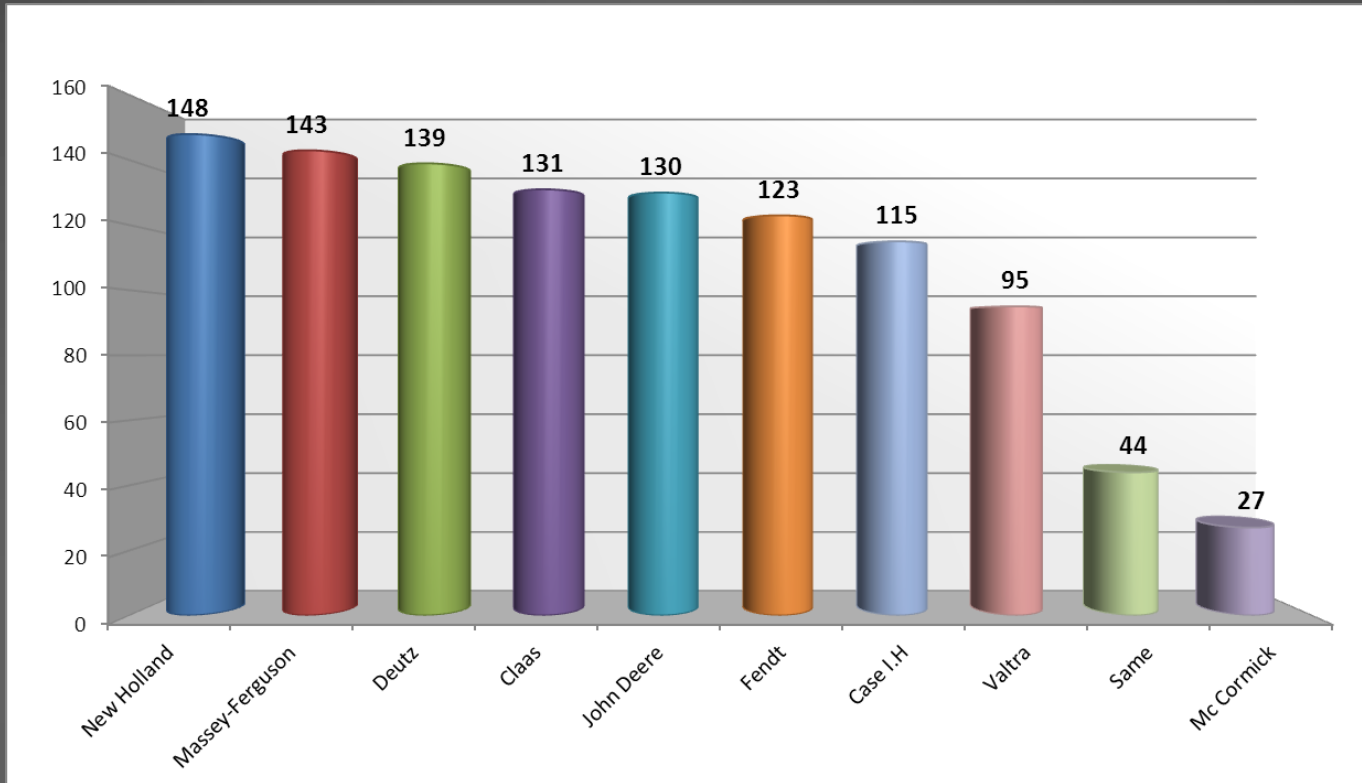


	DENMARK	● 96	● 76
	GERMANY	● 313	● 305
	FRANCE	● 288	● 269
	ITALY	● 58	● -
	The NETHERLANDS	● 163	● 168
	POLAND	● 38	● 32
	UNITED KINGDOM	● 0	● 145
	SWITZERLAND	● 131	● 100

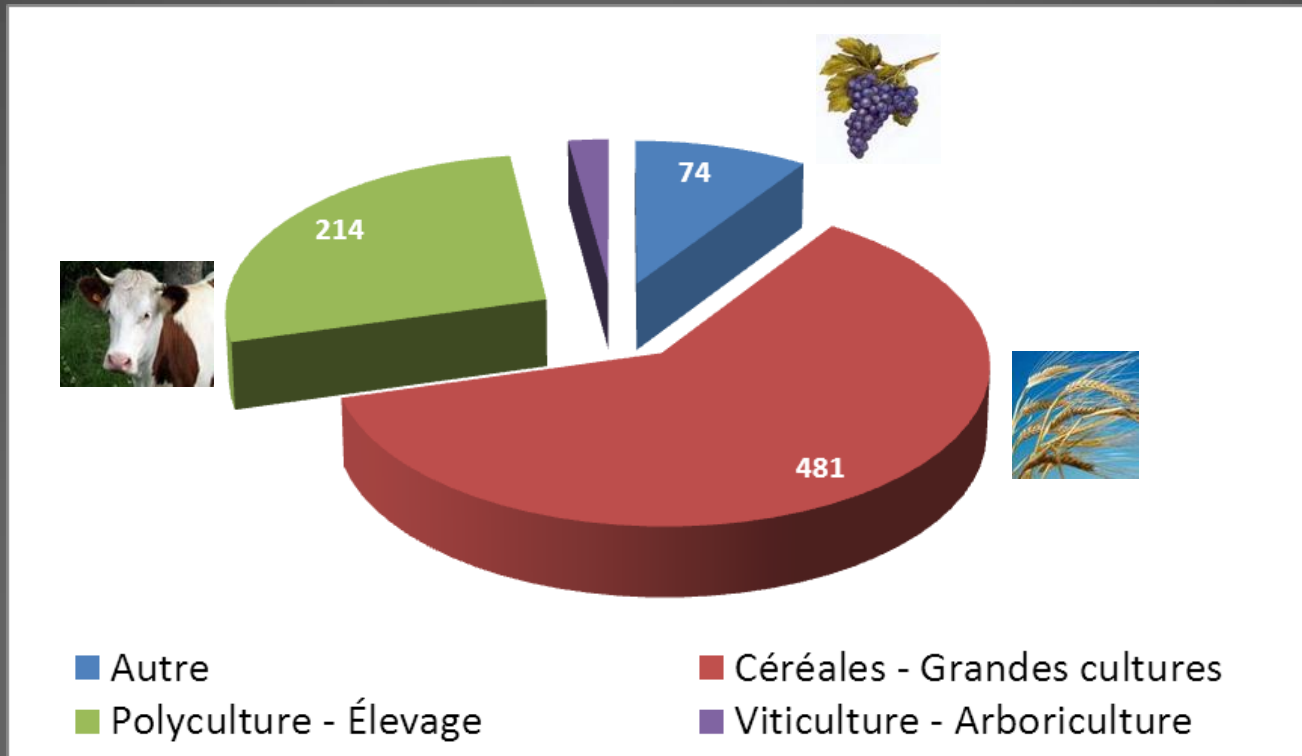
1095 ANSWERS



NUMBER OF ANSWERS BY BRAND



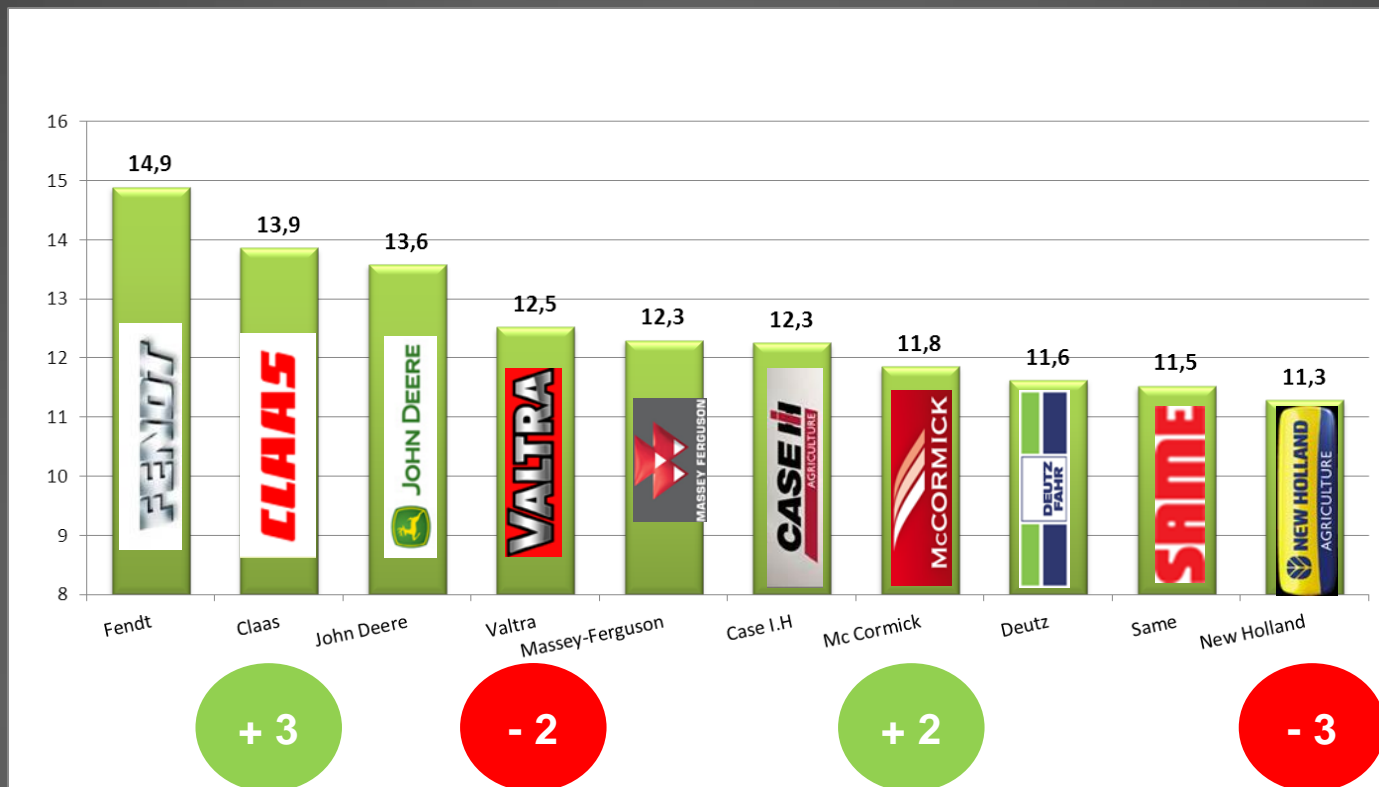
ANSWERS BY PRODUCTIONS



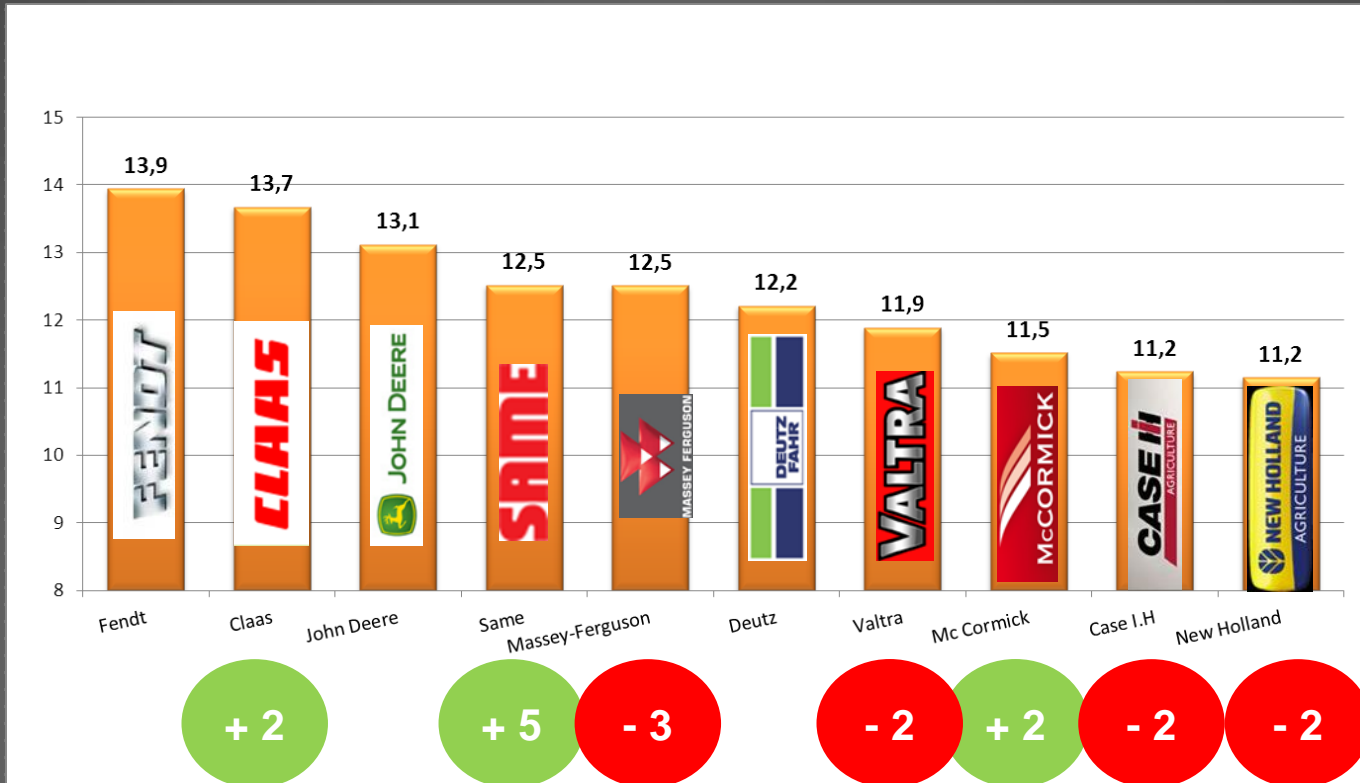


RESULTS

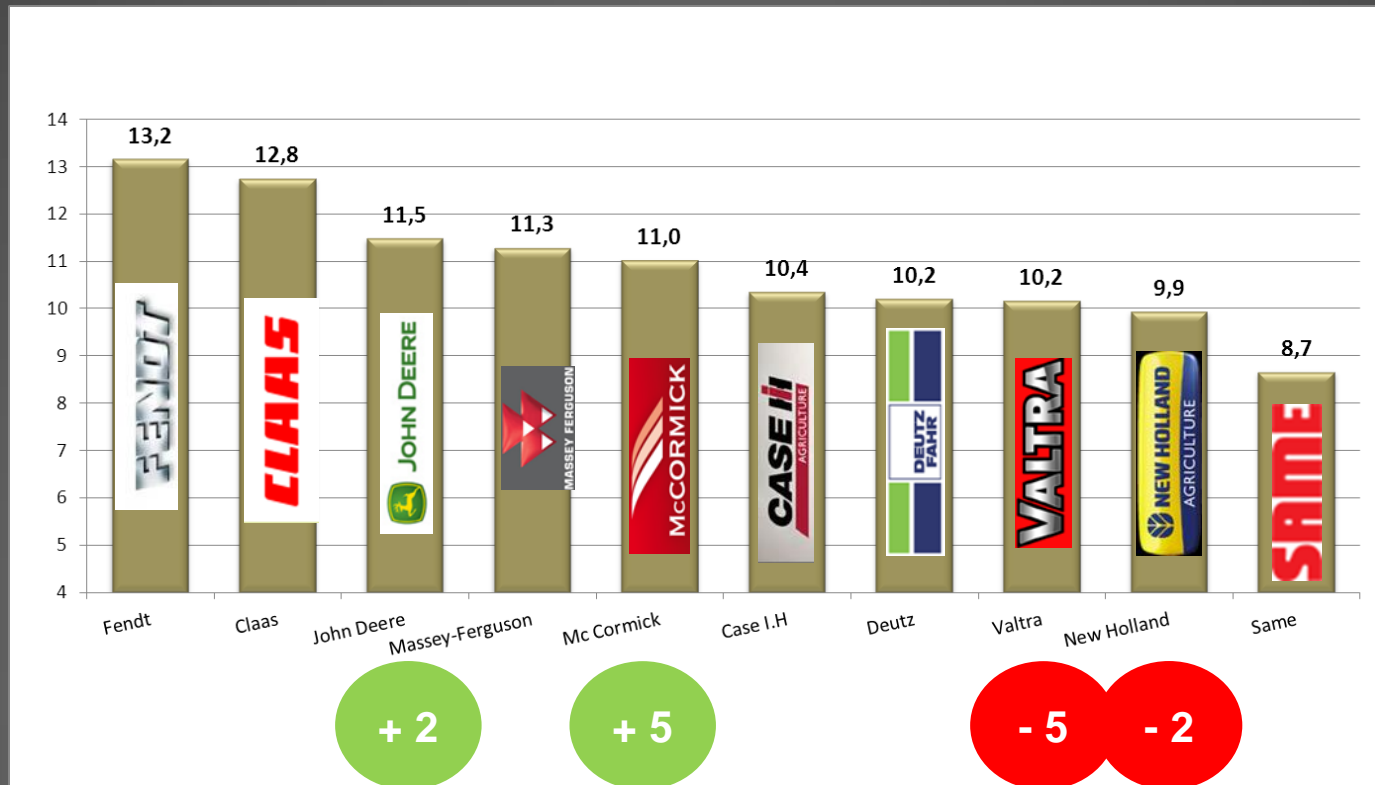
AFTER SALES SERVICE AND WARRANTY



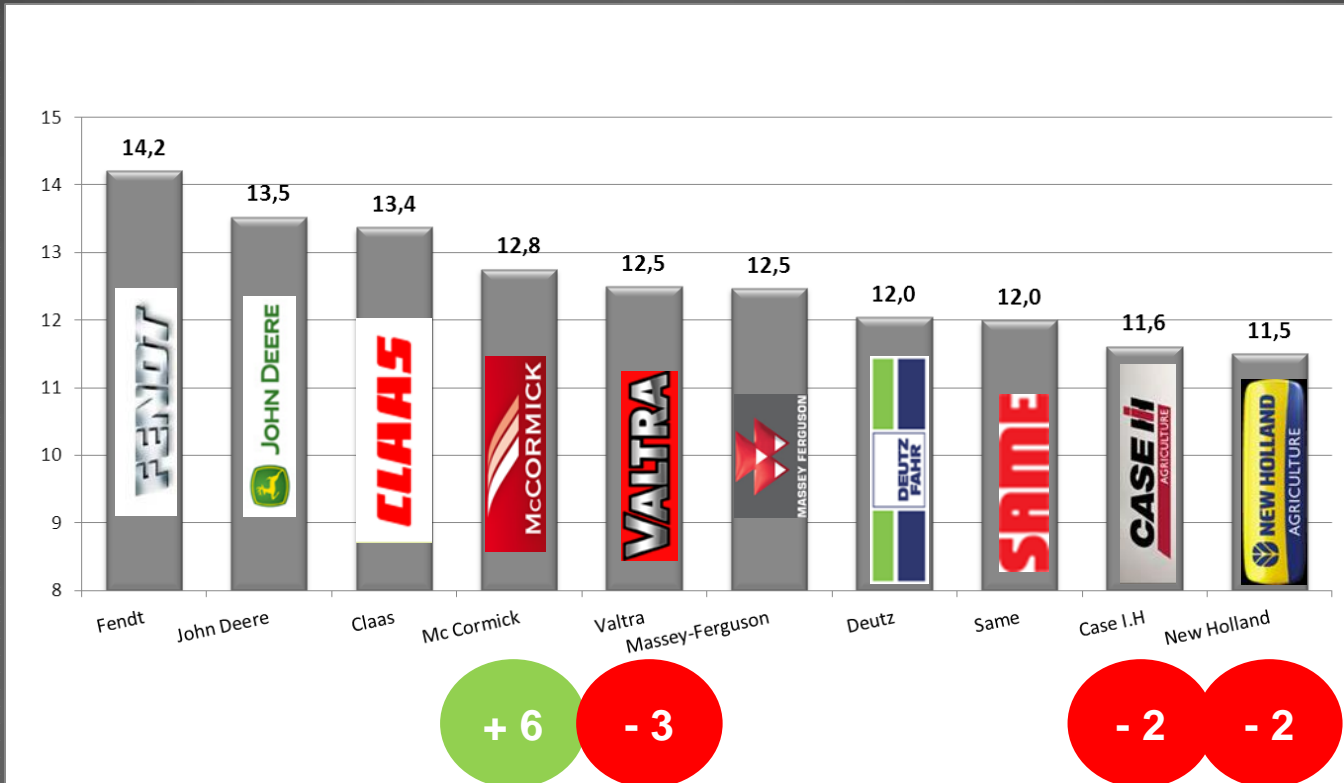
COMPUTER SERVICES



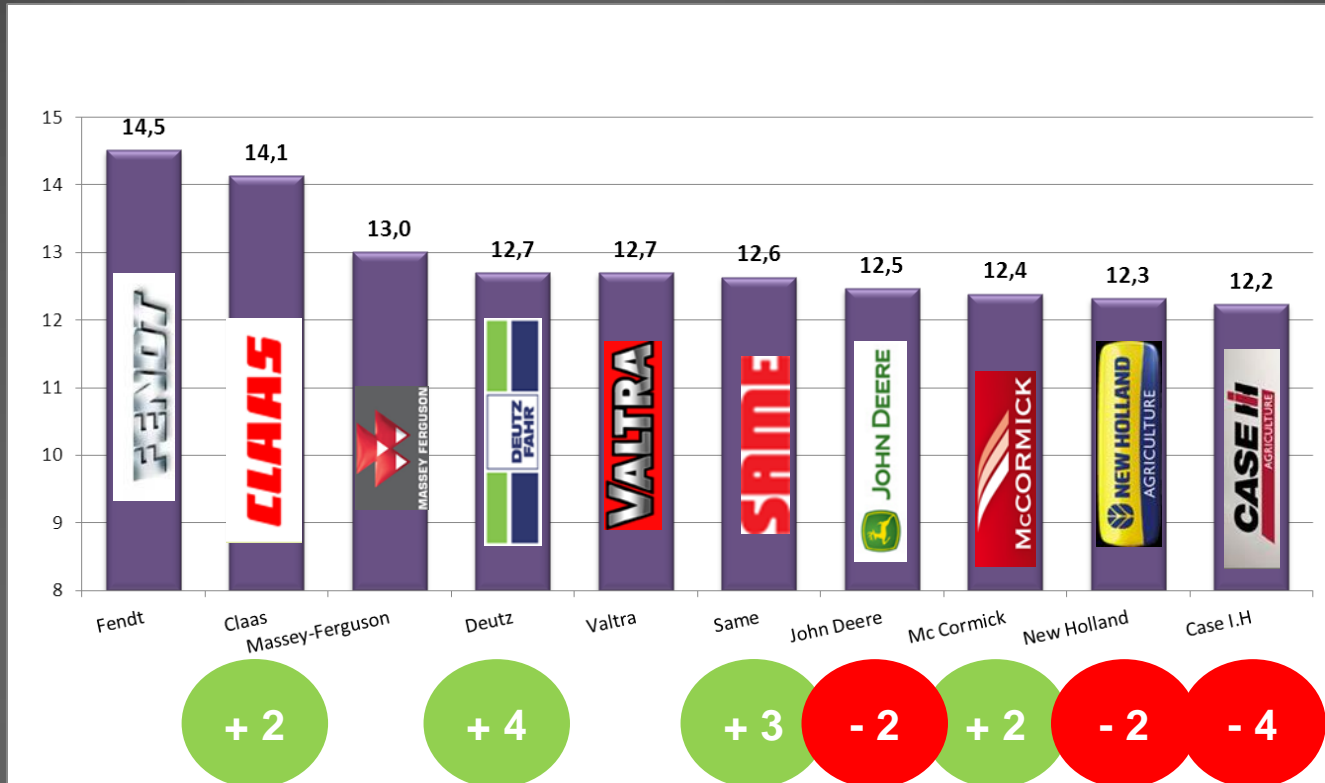
AVERTISING AND PRODUCT SUPPORT



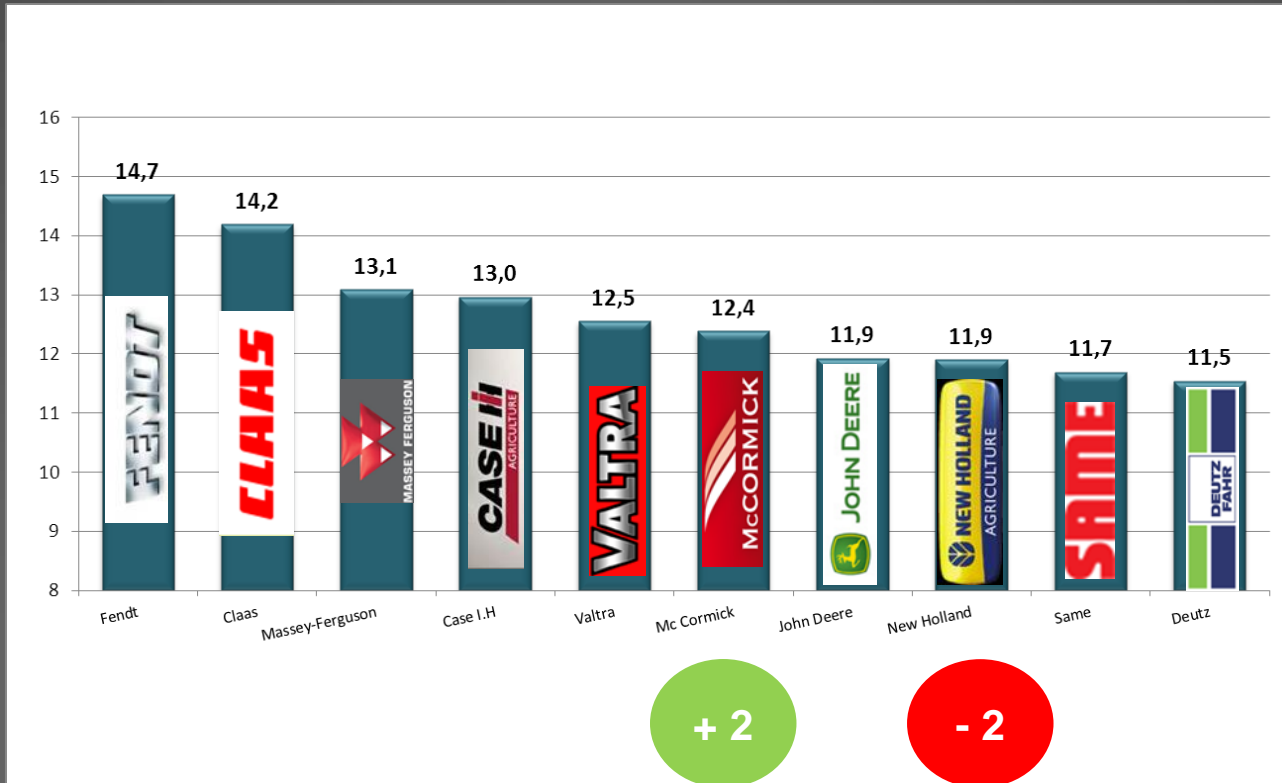
ADMINISTRATION - TERMS OF PAYMENT



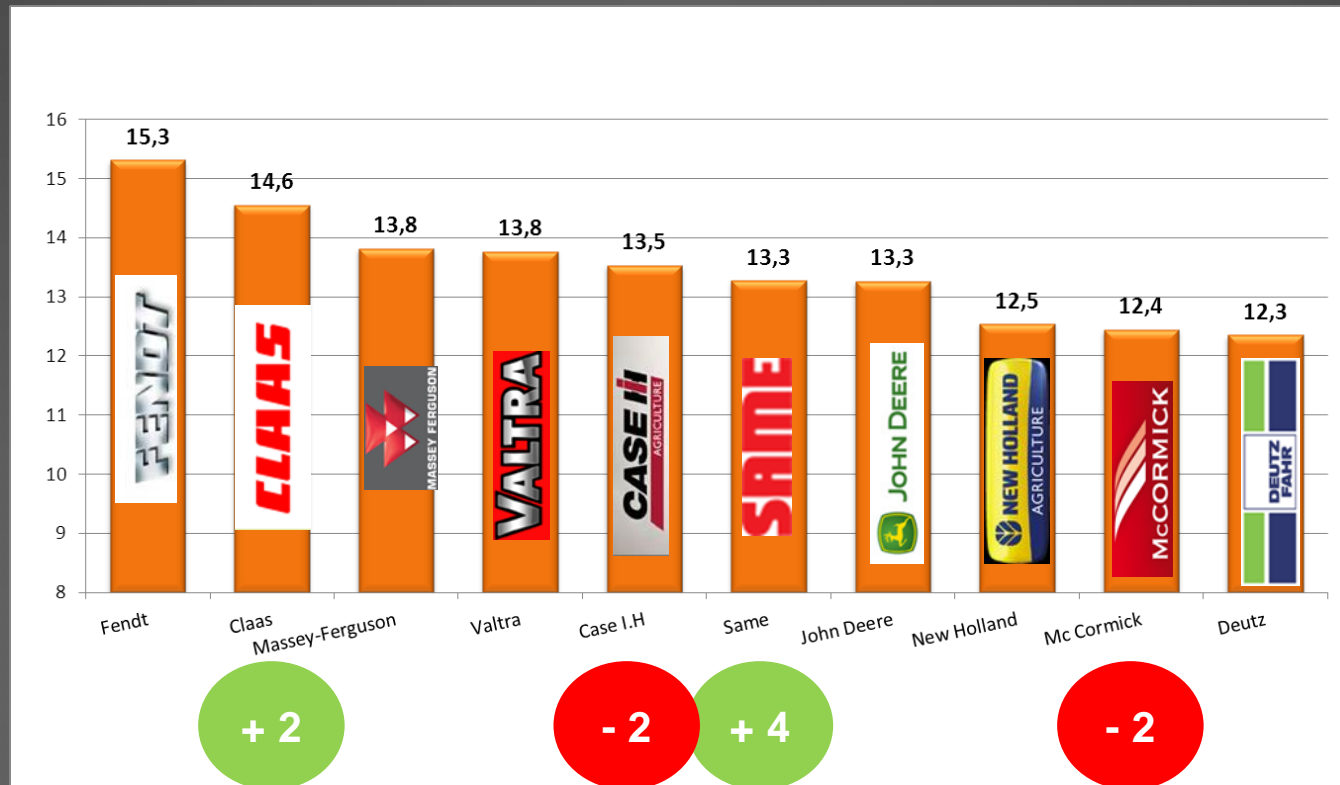
TRAINING



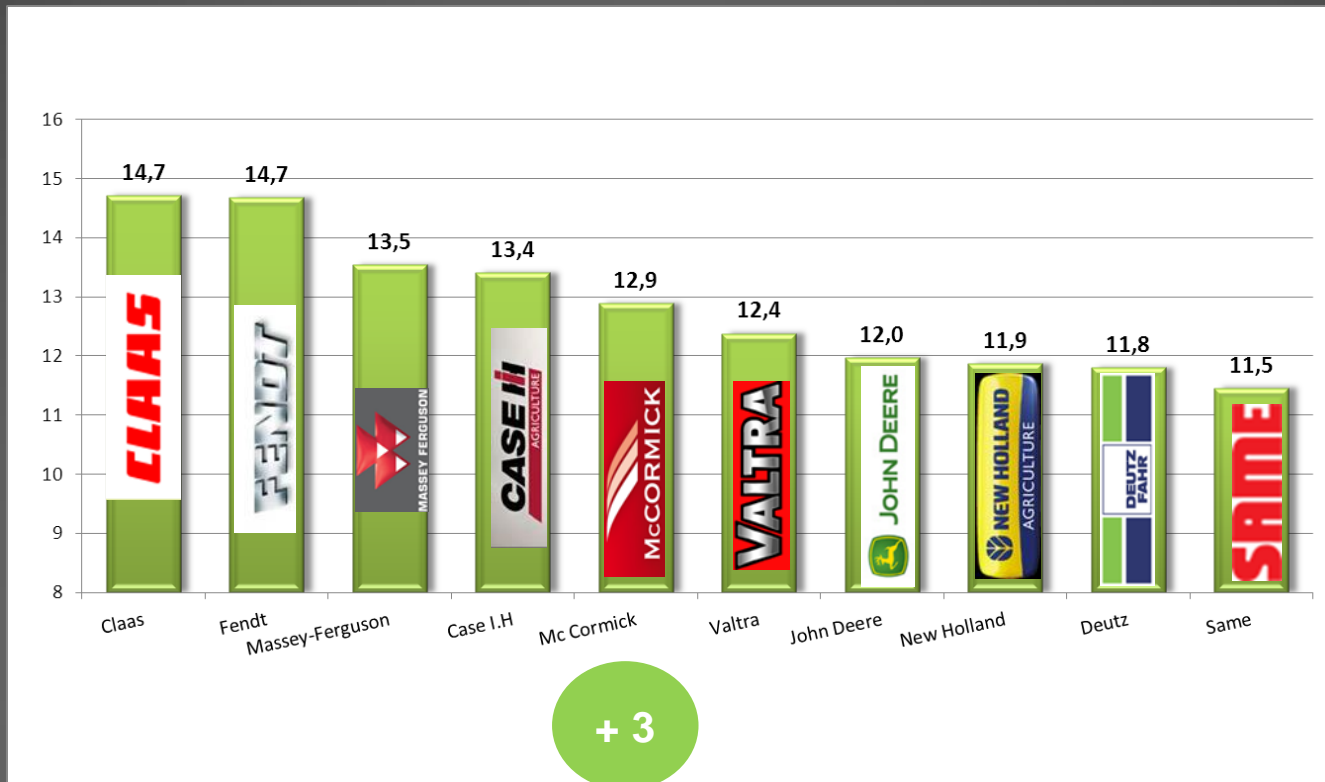
THE MANAGEMENT



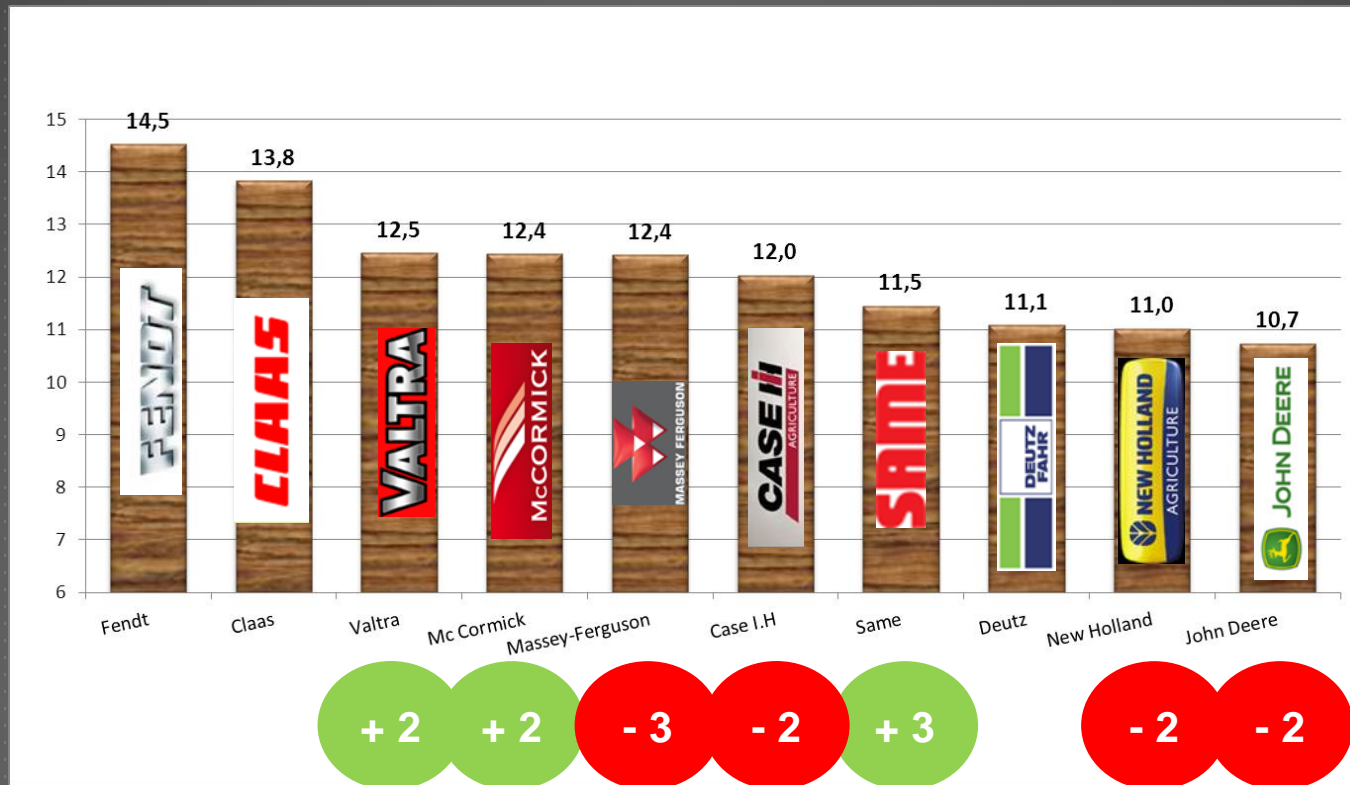
HONOURING COMMITMENTS



AVAILABILITY OF MANAGERS



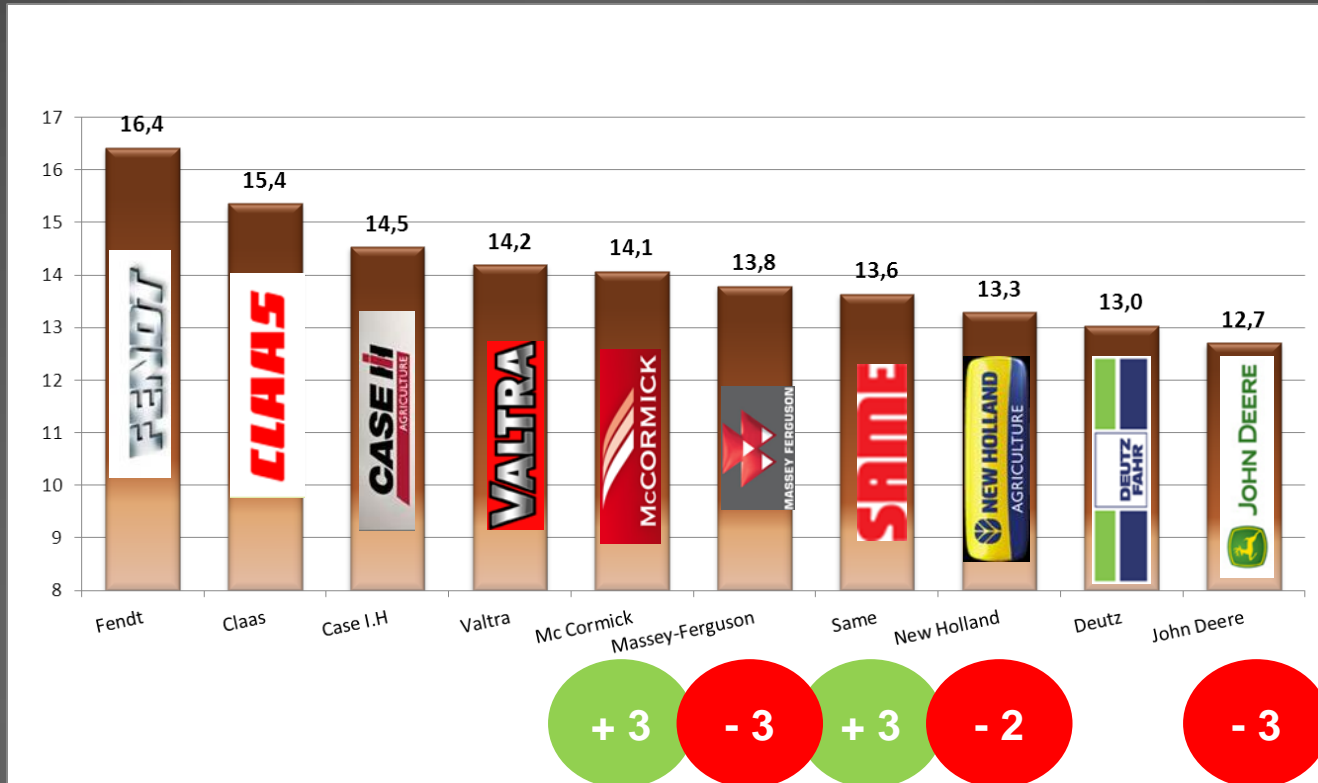
AUTHORITY IN SETTTLING DISPIITES



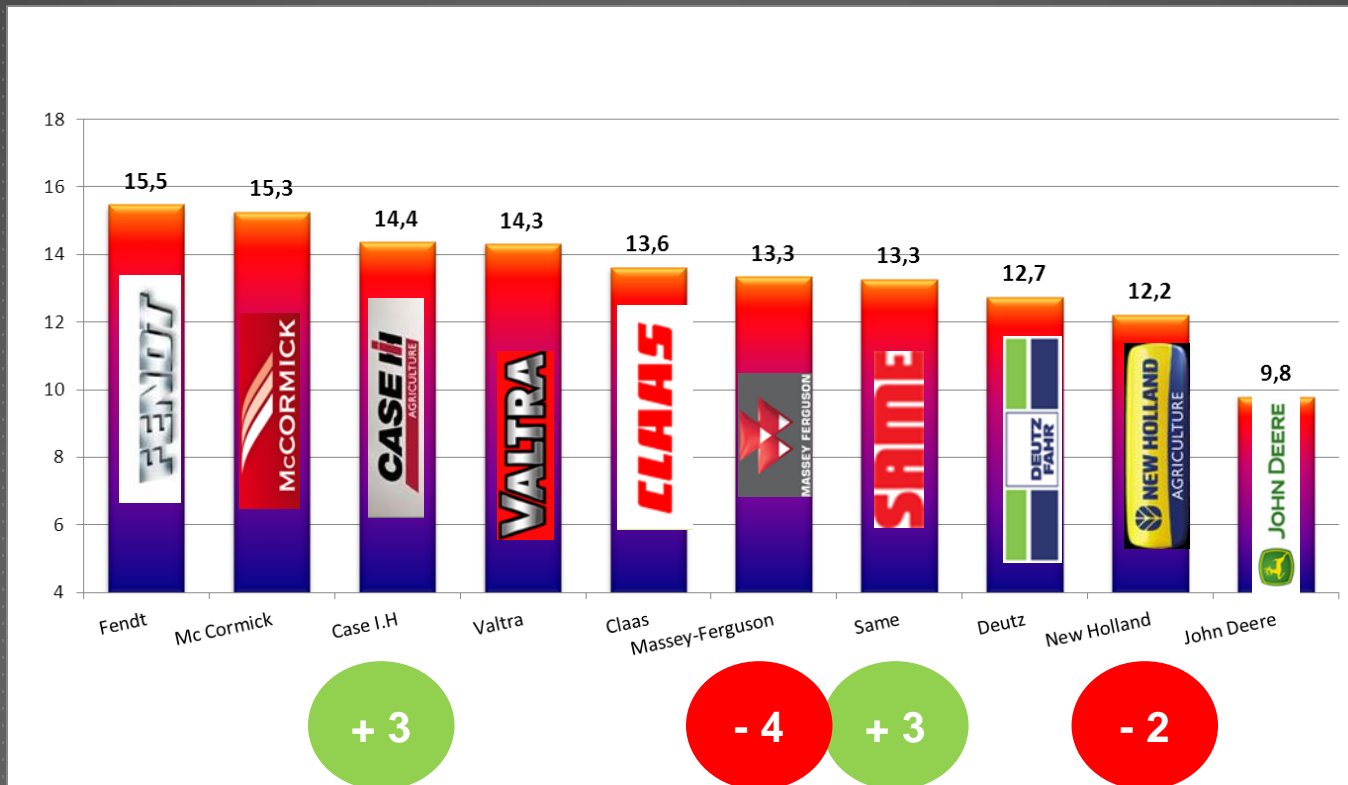
COMMUNICATION AND REALISM OF STRATEGY



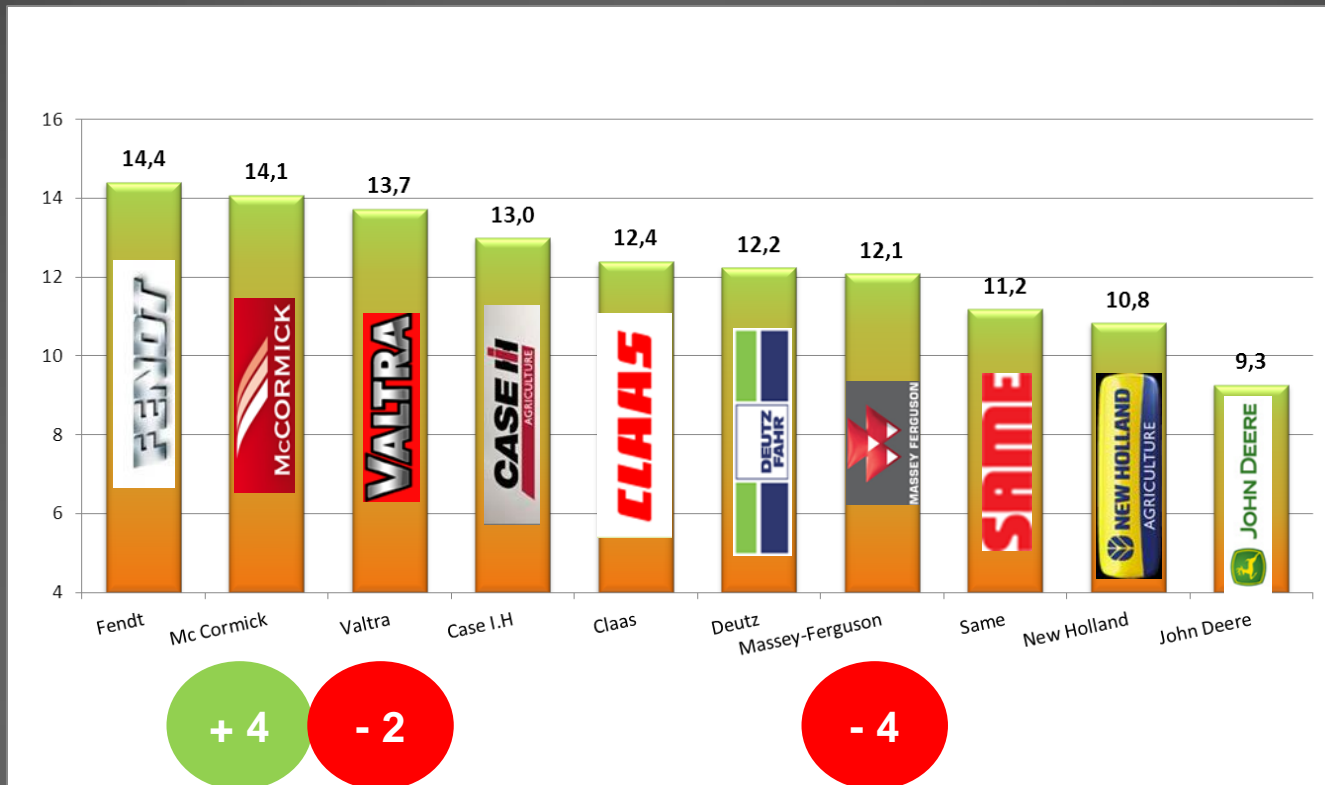
QUALITY OF RELATIONSHIP



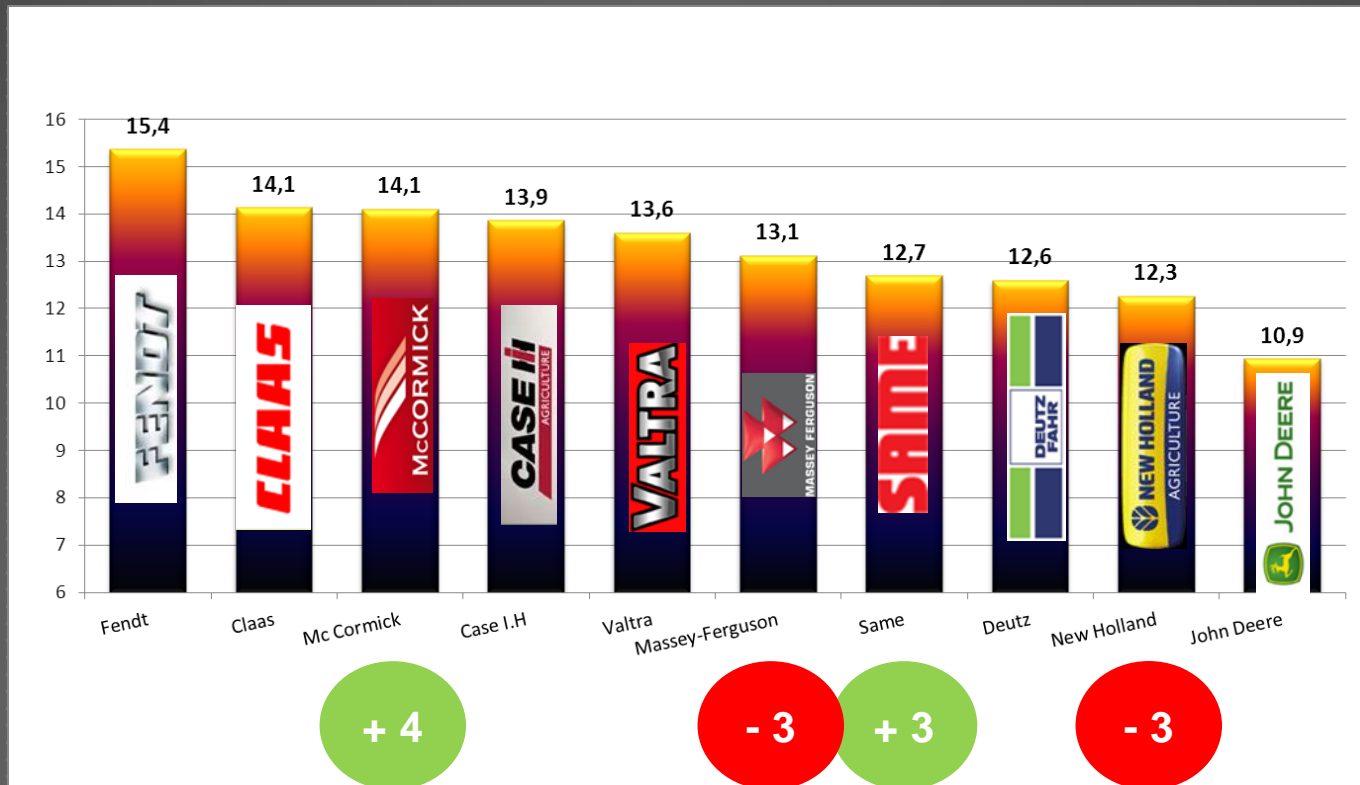
RESPECT OF YOUR AUTONOMY



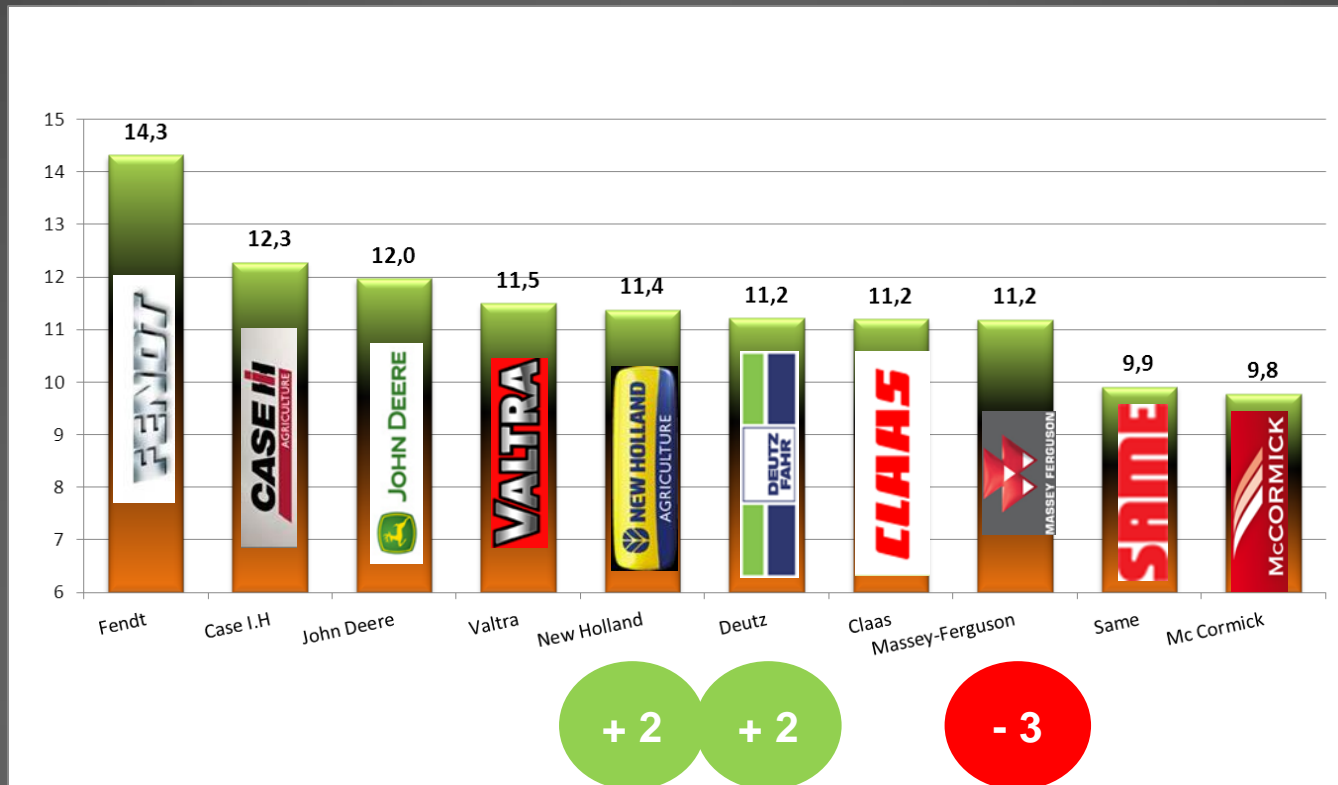
FLEXIBILITY OF NEGOCIATION SALES OBJECTIVES



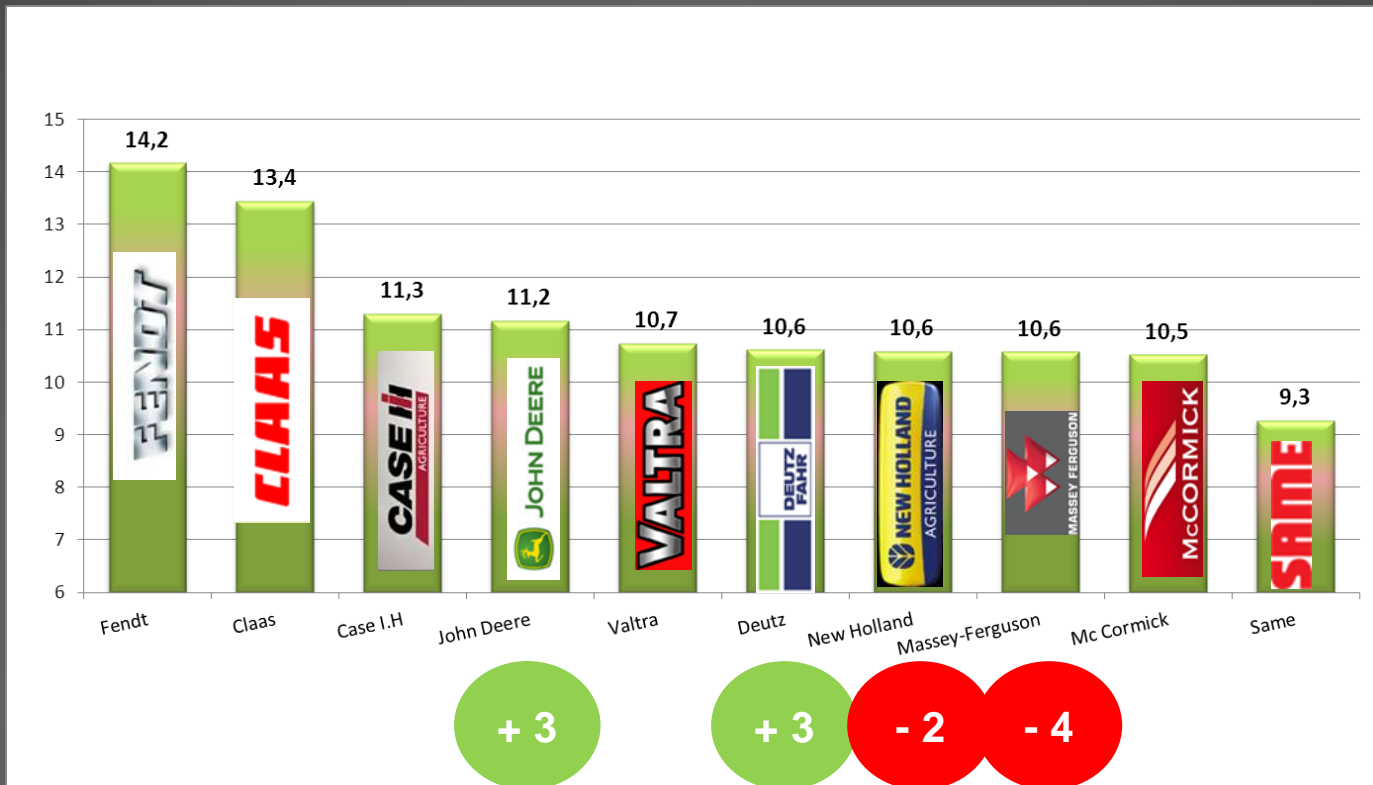
MANUFACTURER-DEALER RELATIONS



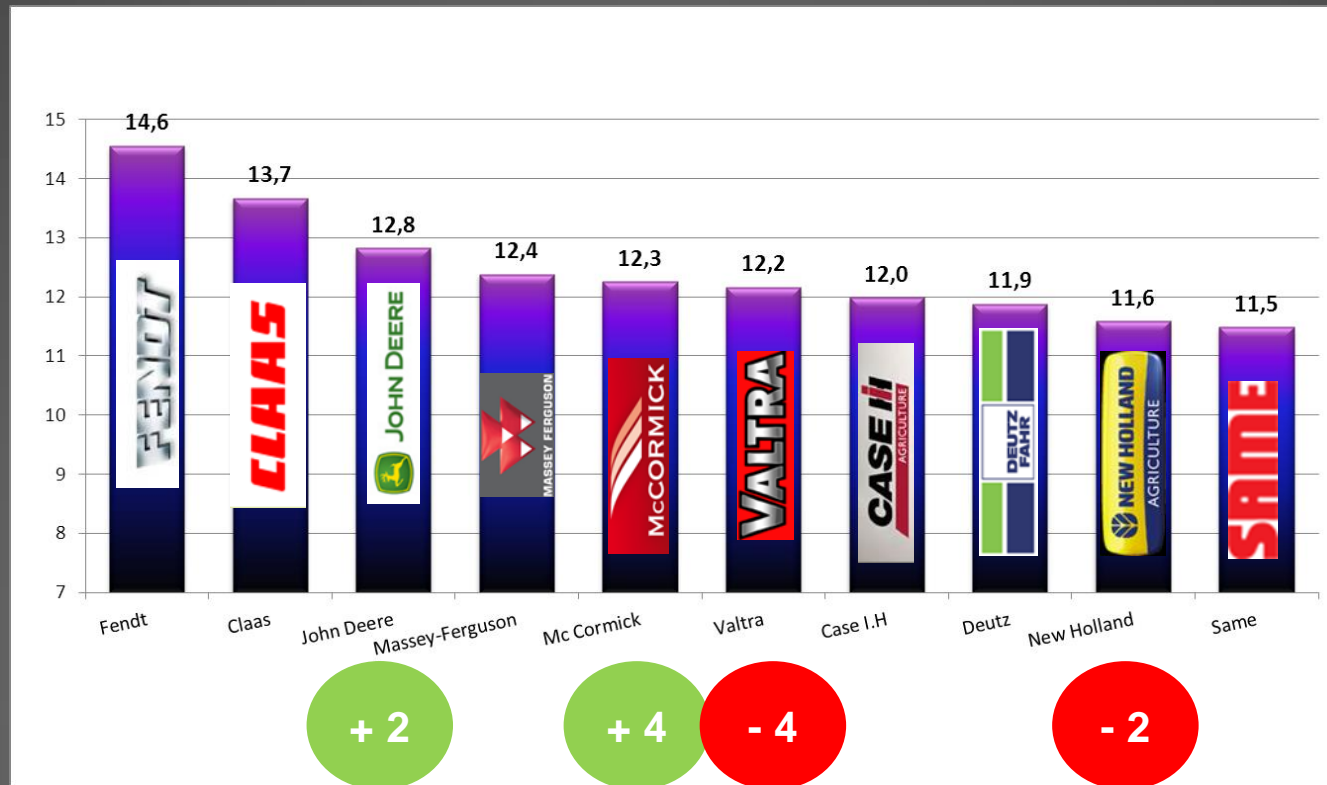
PROFITABILITY CONTRIBUTION



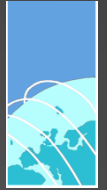
WILLINGNESS TO IMPROVE WEAK POINTS



BRAND OVERALL AVERAGE



COMPARED RANKING

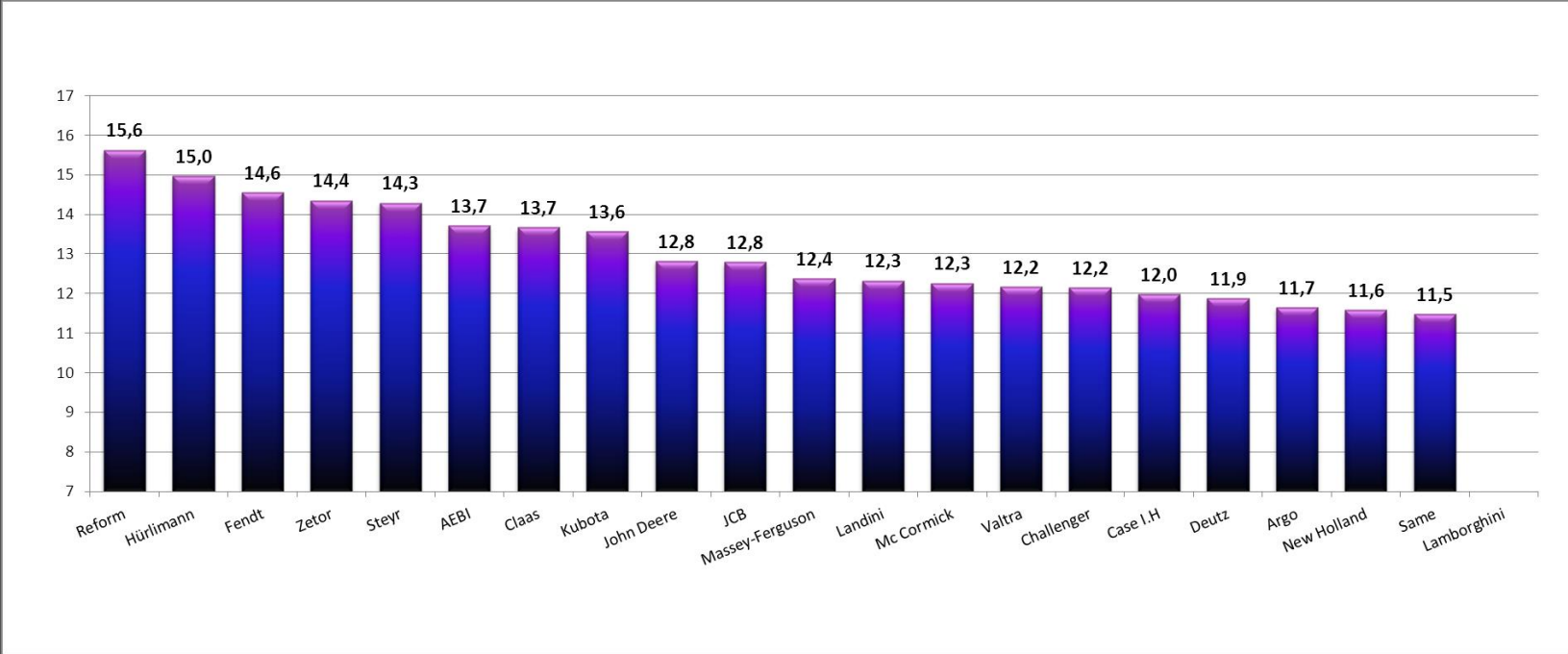


▶ CASE	▶ 5	▶ 6	▶ 8	▶ 5	▶ 5	▶ 6	▶ 5	▶ 7
▶ CLAAS	▶ 4	▶ 3	▶ 2	▶ 6	▶ 1	▶ 5	▶ 2	▶ 2
▶ DEUTZ	▶ 7	▶ 9	▶ 4	▶ 8	▶ 2	▶ 3	▶ 8	▶ 8
▶ FENDT	▶ 2	▶ 1	▶ 1	▶ 3	▶ -	▶ 1	▶ 4	▶ 1
▶ JOHN DEERE	▶ -	▶ 4	▶ 5	▶ 2	▶ 4	▶ 8	▶ 1	▶ 3
▶ MASSEY FER.	▶ 3	▶ 5	▶ 7	▶ 4	▶ -	▶ 4	▶ 7	▶ 4
▶ MC CORMICK	▶ 1	▶ 8	▶ -	▶ -	▶ 8	▶ 9	▶ 3	▶ 5
▶ NEW HOLLAND	▶ 8	▶ 7	▶ 9	▶ 1	▶ 6	▶ 7	▶ 9	▶ 9
▶ SAME	▶ 9	▶ 10	▶ 3	▶ -	▶ 7	▶ 2	▶ 10	▶ 10
▶ VALTRA	▶ 6	▶ 2	▶ 6	▶ 7	▶ 3	▶ 10	▶ 6	▶ 6

COMPARED RANKING

									
1									
2									
3									
4									
5									
6									
7									
8									
9									
10									

THE TRUE RANKING...



CLIMMAR DECISIONS



- ▶ Each country decides what it publishes for its own results
- ▶ CLIMMAR does not publish countries results
- ▶ CLIMMAR publishes only overall results

BRAND RESULTS SEND TO MANUFACTURERS



VIRTUAL BRAND

	BRAND RESULTS			OVERALL RESULTS			EVOLUTION	
	TOTAL RESPONSES	GRADE OUT OF 20	RANKING OUT OF 10	OVERALL AVERAGE	THE LOWEST	THE HIGHEST	BRAND/2007 GRADE	RANKING
I. BRAND IMPACT								
Positive features of your manufacturer's image in the agricultural world	30	13,1	6	13,5	8,2	18,7	1,3	2
Reliability of tractors	30	13,7	5	13,5	10,8	16,9	0,7	0
Adaptation of tractors to your market	30	14,7	1	13,2	10,2	14,7	2,2	7
Lasting quality of your brand	30	13,3	8	14,0	6,9	18,0	1,6	1
Level of innovation and development	30	12,9	7	13,3	9,3	18,4	1,6	2
		13,5	7	13,5	10,1	16,9	1,5	2
II. MARKETING OF TRACTORS								
Effectiveness of sales assistance	30	11,7	4	10,9	7,8	14,2	0,1	1
Availability of tractors (waiting times, order modifications)	30	10,8	4	9,8	2,9	14,1	0,3	4
Respect of delivery deadlines	30	12,1	5	11,5	2,9	17,0	-0,7	1
Quality-price relation	30	12,1	2	10,9	9,3	12,4	1,8	4
Contribution of your supplier to the sale of second-hand equipment	30	3,7	7	5,2	1,8	10,2	0,7	1
		10,1	5	9,7	5,2	12,8	0,4	2
III. MARKETING OF SPARE PARTS								
Effectiveness of sales assistance	30	9,5	8	10,6	8,8	13,0	-1,2	-3
Availability of parts	30	13,7	6	13,0	9,6	15,9	0,2	-1
Respect of delivery deadlines	30	13,7	6	13,0	9,2	15,4	0,2	-2
Quality-price relation	30	11,5	5	11,6	10,3	13,9	0,2	-1
Protection level of your brand against a similar market	30	9,1	8	10,2	3,8	15,3	0,8	0
		11,5	6	11,7	9,2	14,4	0,0	-1
IV. AFTER-SALES SERVICE GUARANTEES								
Effectiveness of manufacturer's technical assistance	30	12,7	5	12,3	9,0	15,3	0,8	1
Quality and quantity of documentation	30	13,5	6	13,3	10,8	15,7	0,9	2
Updating of documentation	30	13,3	5	13,5	11,1	15,9	0,2	2
Reimbursement of guaranteed work	30	10,9	5	10,9	6,8	13,8	0,6	1
Possibility of free reconditioning	30	9,6	5	9,1	6,0	12,7	1,3	2
		12,0	4	11,8	8,8	14,7	0,8	4
V. COMPUTER SERVICES								
Willingness of the manufacturer to facilitate computer communications with your system	30	10,1	5	10,8	8,7	13,2	0,9	3
Cost of establishment and utilisation of computer communications	30	9,2	6	9,5	7,7	13,3	2,0	4
Reliability and readability of tractor price lists and spare parts on the Internet	30	10,3	9	12,7	10,0	16,0	0,5	1
Your employee's ease of access to information provided by your manufacturer	30	12,0	8	12,8	9,6	14,9	1,2	2
Competence of your manufacturer's computer representative	30	10,4	6	10,9	6,9	14,1	1,3	2
		10,4	8	11,4	9,4	13,7	1,2	2
VI. ADVERTISING AND PRODUCT SUPPORT MATERIAL								
Advertising budget of your manufacturer	30	10,1	6	10,6	7,7	13,8	-0,8	0
Effectiveness of your manufacturer's advertising	30	11,9	5	11,8	9,6	14,1	1,0	3
Your manufacturer's level of participation in your advertising	30	8,3	5	9,3	4,9	13,9	2,1	3
Your manufacturer's adaptation to your Internet/second-hand trade needs	30	3,7	9	7,1	3,1	11,6	0,0	0
Quality of CDs and other support that help sales	30	11,7	6	11,4	7,2	14,3	2,2	3
		9,1	7	10,1	7,5	12,7	0,9	1

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RESULTS GIVEN TO THE PRESS



BRAND XX

	BRAND RESULTS					
	GRADE			RANKING		
	2005	2006	2007	2005	2006	2007
V. COMPUTER SERVICES						
Willingness of the manufacturer to facilitate computer communications with your system	9.0	8.9	9.2	7	10	8
Cost of establishment and utilization of computer communications	7.9	7.5	7.2	8	10	10
Reliability and readability of tractor price lists and spare parts on the Internet	9.3	8.5	8.9	9	10	10
Your employees' ease of access to information provided by your manufacturer	11.4	10.9	10.6	5	9	10
Competence of your manufacturer's computer representative	8.2	7.5	8.1	9	10	8
	9.2	8.7	9.2	9	10	10
VI. ADVERTISING AND PRODUCT SUPPORT MATERIAL						
Advertising budget of your manufacturer	7.2	7.5	10.9	9	9	6
Effectiveness of your manufacturer's advertising	8.4	8.6	10.9	9	9	8
Your manufacturer's level of participation in your advertising	4.1	4.5	5.2	9	9	8
Your manufacturer's adaptation to your Internet/second hand trade needs	4.0	3.9	3.7	9	9	9
Quality of CDs and other support that help sales	5.9	5.5	6.5	7	9	9
	6.6	6.6	8.2	10	9	8
VII. PROCEDURES AND TERMS OF PAYMENT						
Follow-up reliability	10.0	10.7	11.7	10	10	9
Simplicity of guarantee claims procedures	8.9	8.0	8.2	8	9	9
Reimbursement speed by your manufacturer of the sums he owes you	6.8	8.1	10.9	10	10	7
Terms of payment for tractors	9.8	10.1	9.4	7	7	9
Terms of payment for spare parts	11.8	12.0	12.1	4	3	4
	9.4	9.8	10.7	9	9	9
VIII. TRAINING						
Quality/price relation of training programmes organised by your manufacturer	7.4	7.8	8.1	8	9	8
	10.1	9.4	10.5	9	10	8
IX. THE FIRM						
no results about men						
X. MANUFACTURER-DEALER RELATIONS						
Quality of relations with your manufacturer	11.0	11.4	13.1	6	8	6
Your manufacturer's respect of your autonomy as head of your enterprise	11.6	12.5	13.9	7	6	5
Possibility of negotiating sales objectives	8.4	8.4	10.9	7	7	5
Your degree of confidence in the managers of your manufacturer	9.0	9.3	11.6	9	9	6
	10.0	10.8	12.6	7	7	6
XI. PROFITABILITY HELP						
Your manufacturer's contribution to the profitability of your enterprise	6.7	6.9	8.1	10	10	9
IMPROVEMENT						
How do you judge the willingness of your tractor operator to improve his weak points?			11.2			5
Which appreciation do you give to the concrete actions realized by your tractor operator?			11.2			4
OVERALL TOTAL	9.2	9.2	10.6	9	10	8

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Only 24 items

ENQUIRY 2013 : WHAT WILL CLIMMAR DECIDE ?



- ▶ CLIMMAR includes 6 new questions about Finance Package Manufacturer's Offers :
 - ▶ Quality of customer finance schemes
 - ▶ New stock financing schemes
 - ▶ Used stock finance schemes
 - ▶ Repaired finance schemes
 - ▶ Commissions received by the dealer for finance schemes
 - ▶ Contributions towards hiring machines

Do you agree ?

NEXT YEAR



WHO WILL JOIN US ?





YQV
Y
MICRO



**FOR
MORE
SUCCESS !**

