

CLIMMAR Dealer Satisfaction Index 2018

European dealers
appreciate
their tractor operators

CLIMMAR
Congress
2018



PRAGUE
Czech Republic
4th – 7th October



summary

- Introduction
- Part I : 2018 Participation
- Part II : 2018/2017 results
- Part III : Progression of each brand
- Information



Survey conducted online for the second time



- Period of completion : June to end of July
- Recalls : 3
- Meeting in Paris with DSI group in august to exchange
- 2 new countries : Austria and Hungary



PART I:

2018 PARTICIPATION

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Evolution of the number of answers by countries



Country	NB OF ANSWERS		2018/2017
	2018	2017	
France	196	307	-36%
Austria	44		
Poland	26	32	-19%
Belgium	50	58	-14%
Italia	93	181	-49%
United Kingdom	89	79	13%
Germany	221	274	-19%
Hungary	28		
Denmark	58	81	-28%
Netherland	126	146	-14%
Europe	931	1159	-19%



Answers for 2018 by brand and by country

-----	Austria	Belgium	Denmark	Germany	France	Italy	Hungary	Netherlands	Poland	UK	Total général
Case I.H	1	4	9	20	18	6	2	18	1	13	91
Claas	5	4	6	30	20	3		15	1	4	83
Deutz	7	4	9	35	18	4		14	2	8	94
Fendt	4	6	3	31	19	4		20		10	93
John Deere		3	2	18	14	6	1	4	8	5	61
Kubota	2	2	2	25	9	9	1	2	8	10	68
Massey-Ferguson	4	5	6	16	22	1	3	20		9	82
New Holland	4	10	8	13	23	8		9	4	9	84
Same	3			12	16	12	3				43
Valtra	2	7	8	21	12	3	1	9	1	4	66
Total général	32	45	53	221	171	56	11	111	25	72	765



PART II:

2018/2017 RESULTS

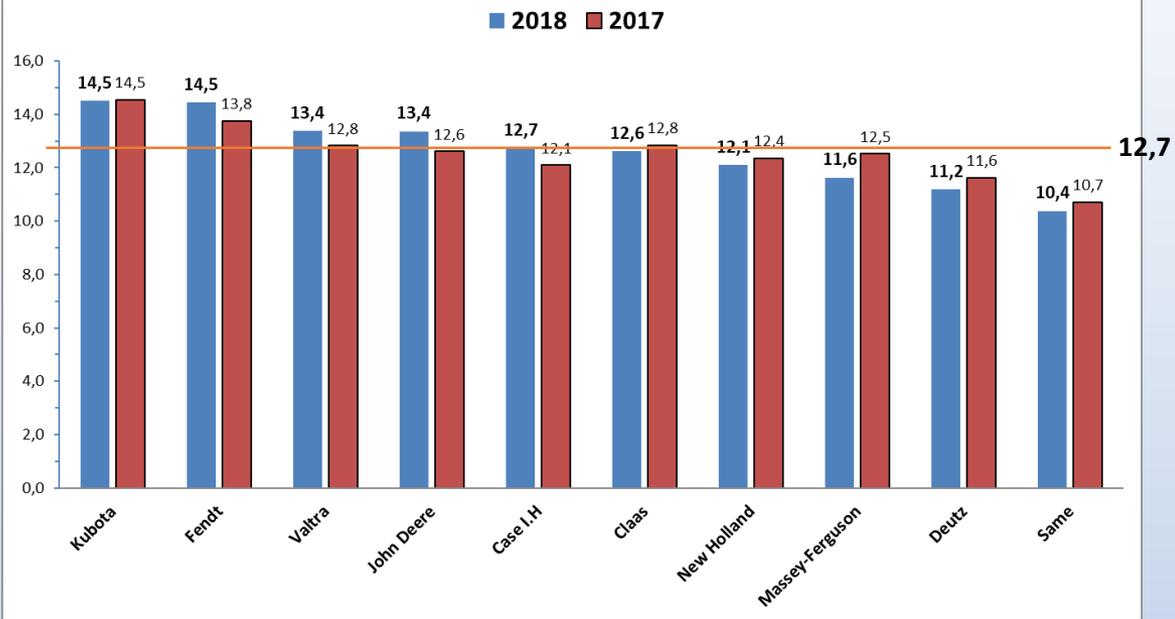
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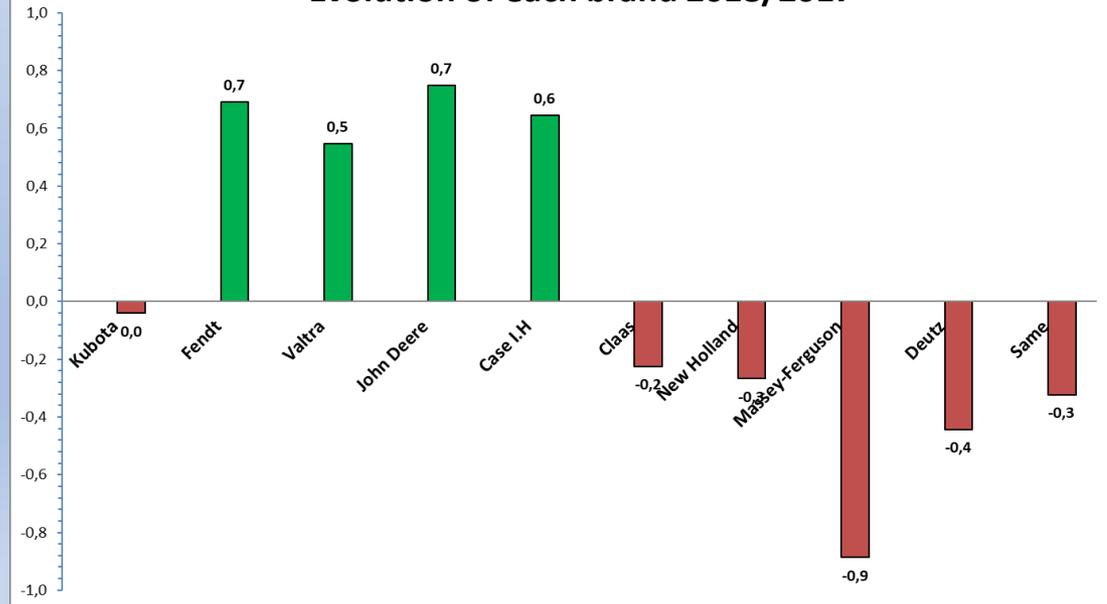
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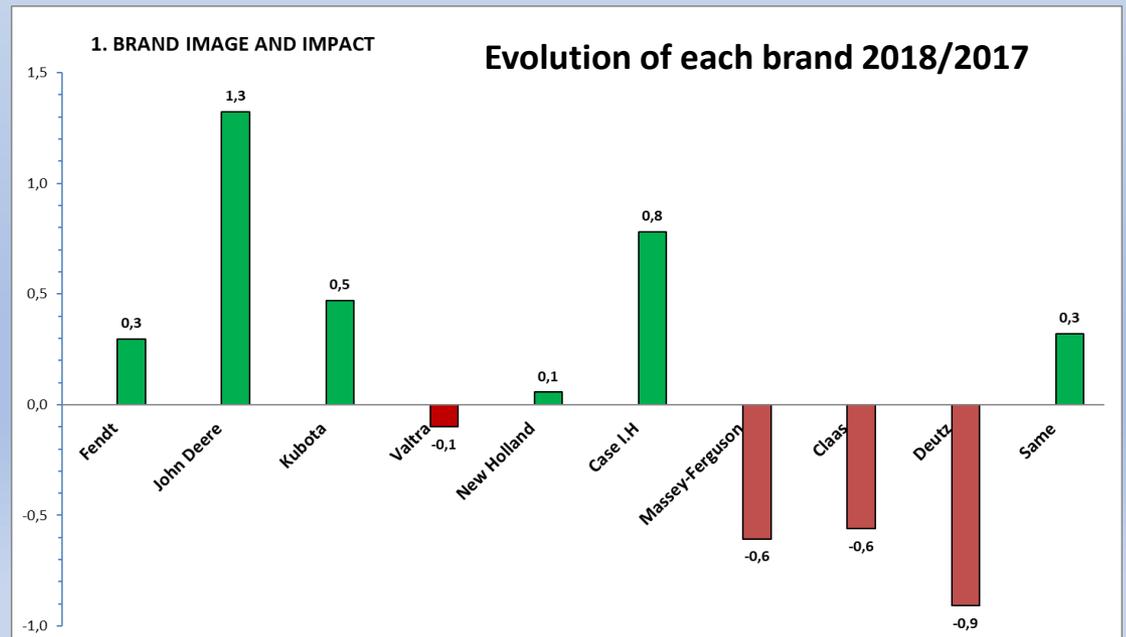
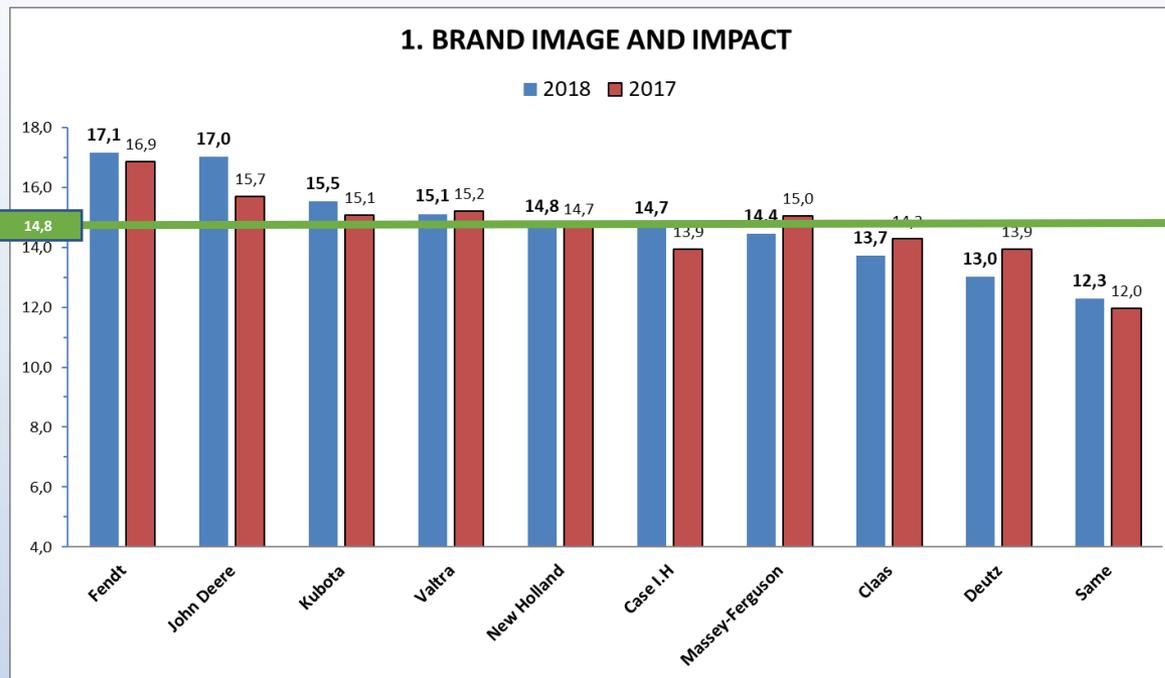


Brand average - by brand

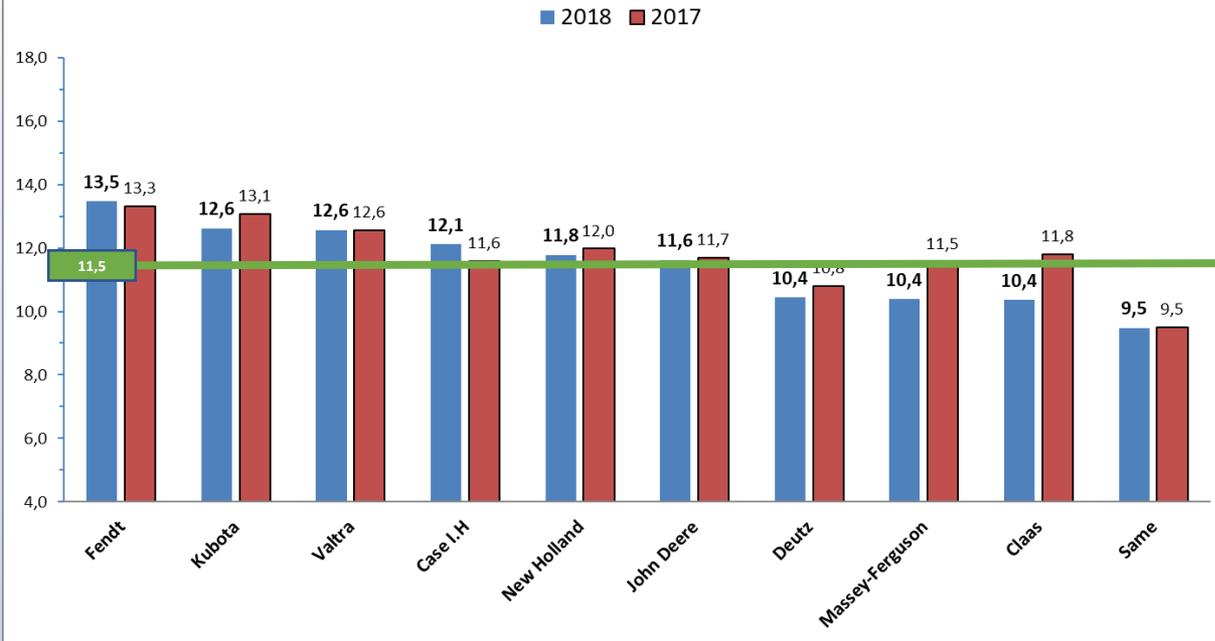


Evolution of each brand 2018/2017



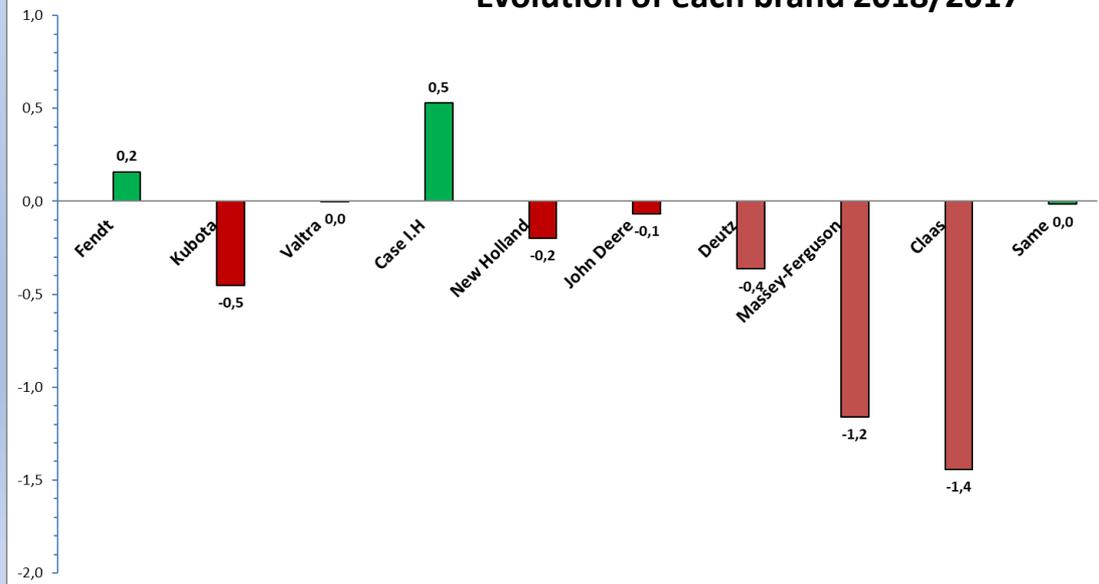


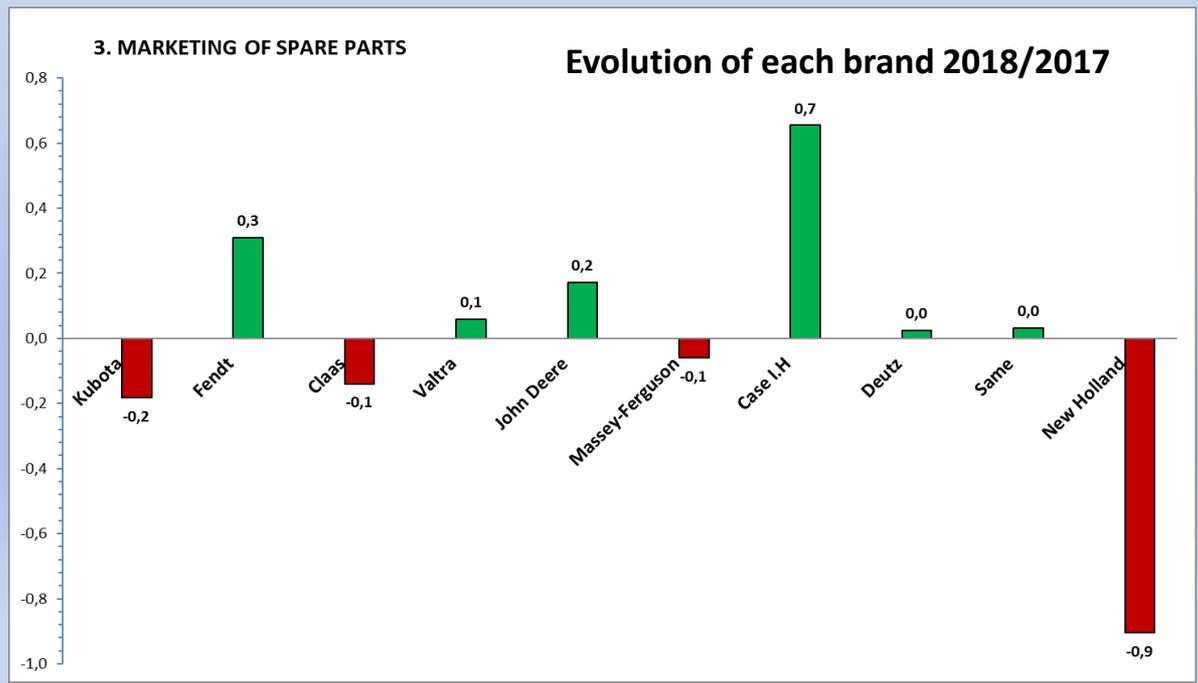
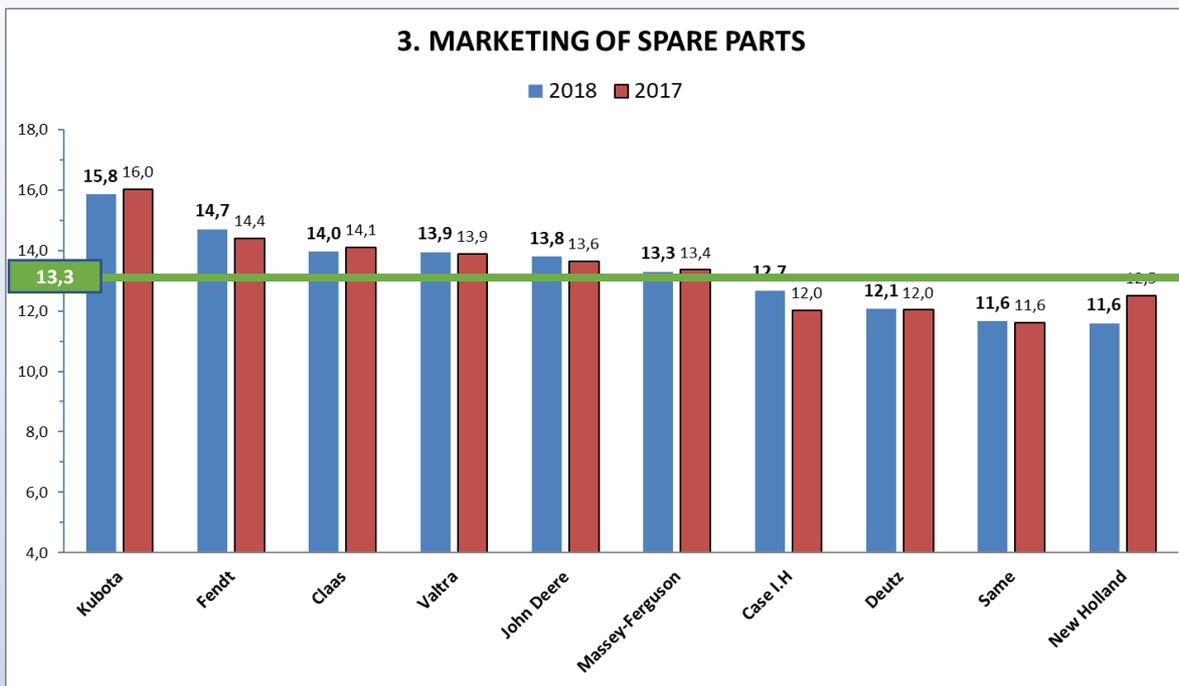
2. MARKETING OF TRACTORS

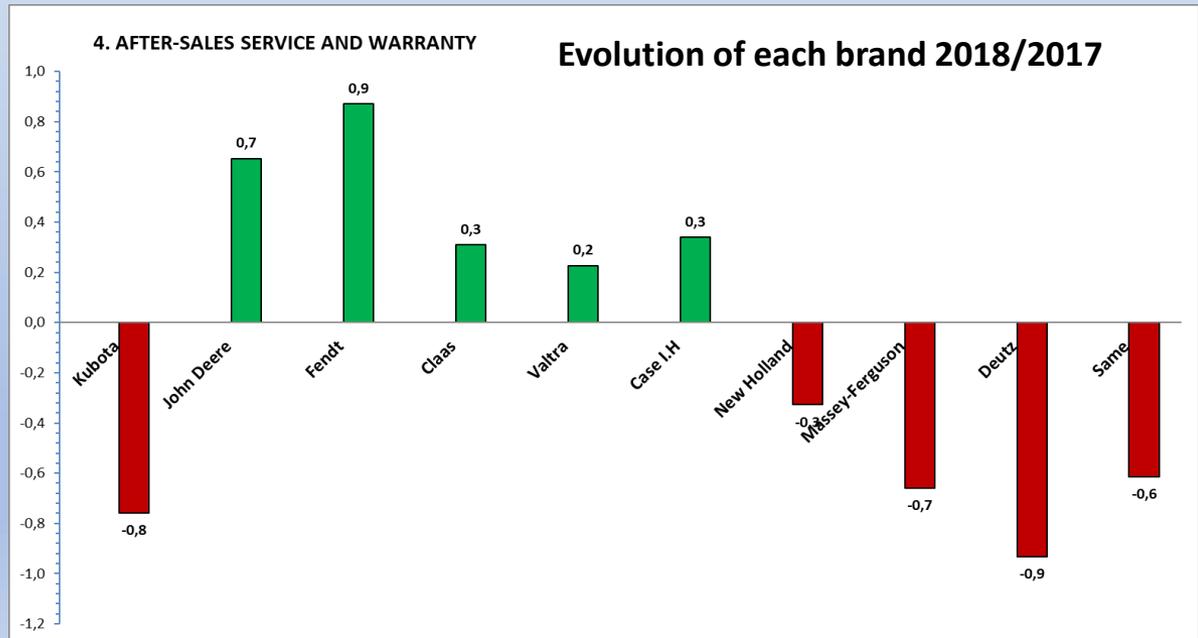
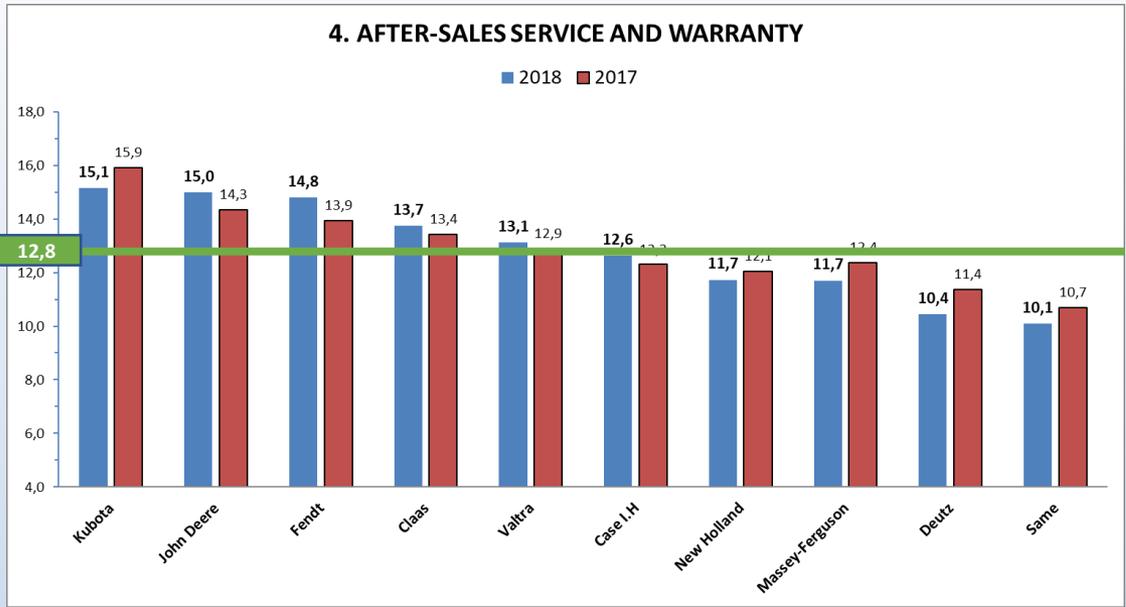


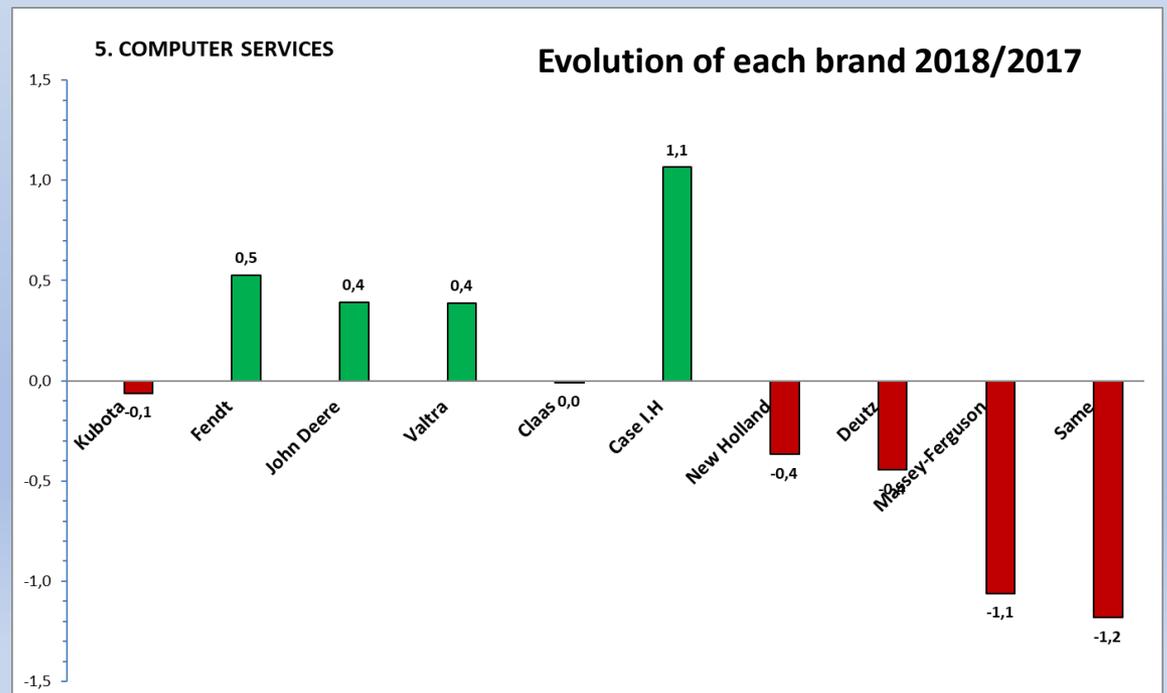
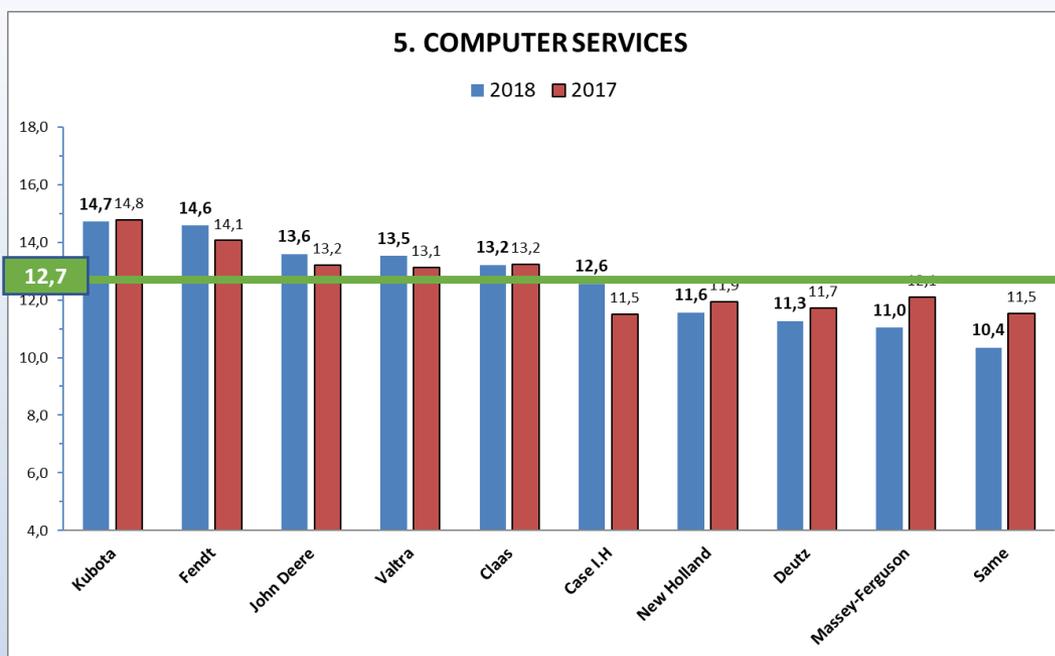
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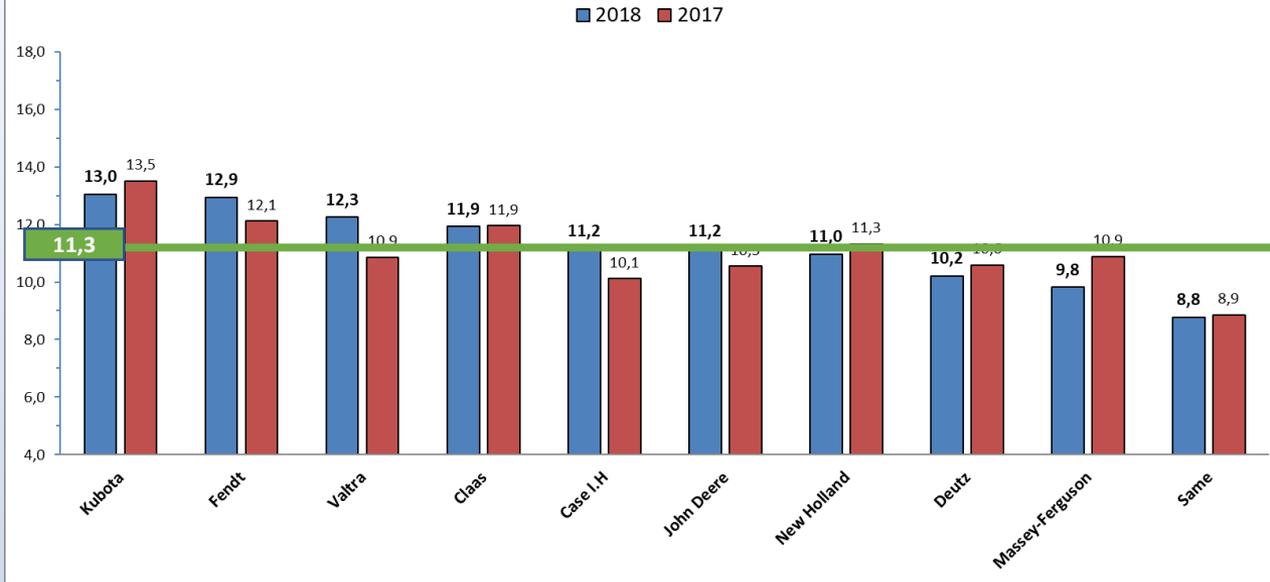






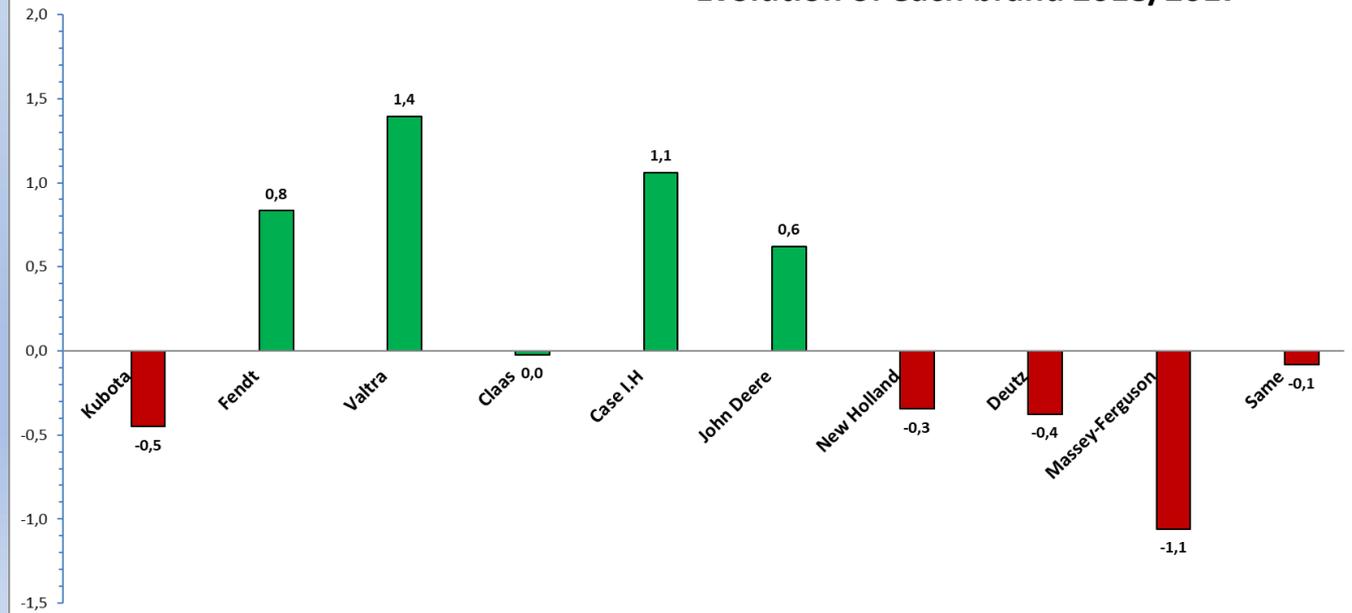


6. ADVERTISING AND PRODUCT SUPPORT MATERIAL

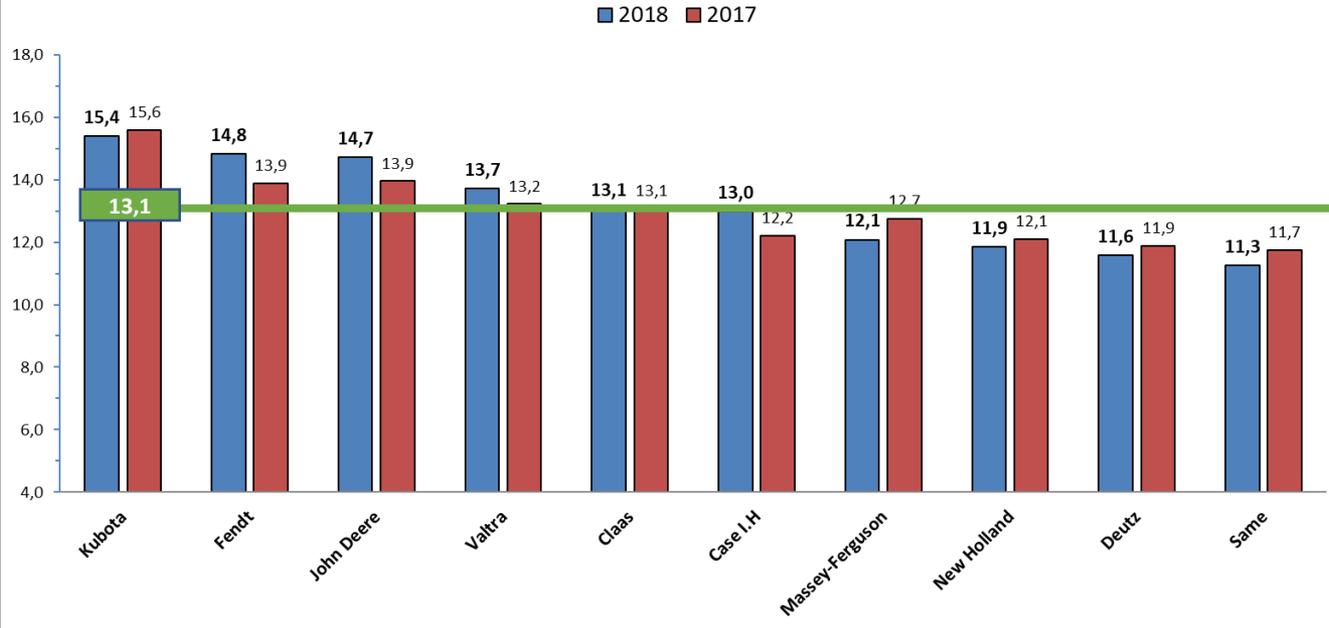


6. ADVERTISING AND PRODUCT SUPPORT

Evolution of each brand 2018/2017

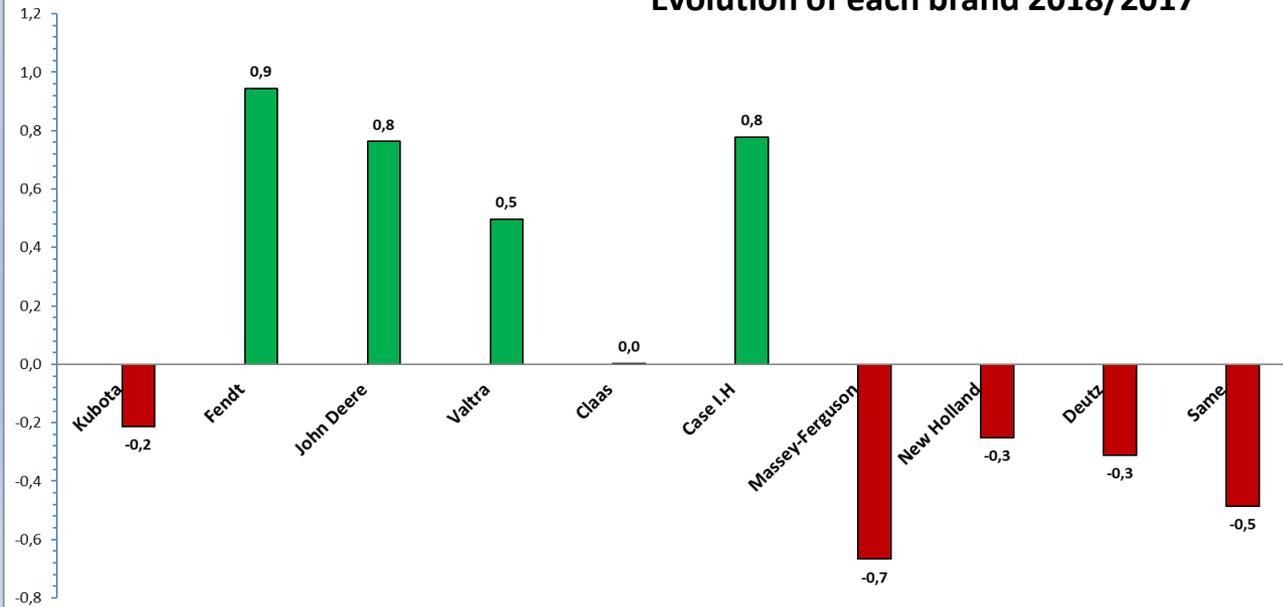


7. ADMINISTRATION AND TERMS OF PAYMENT



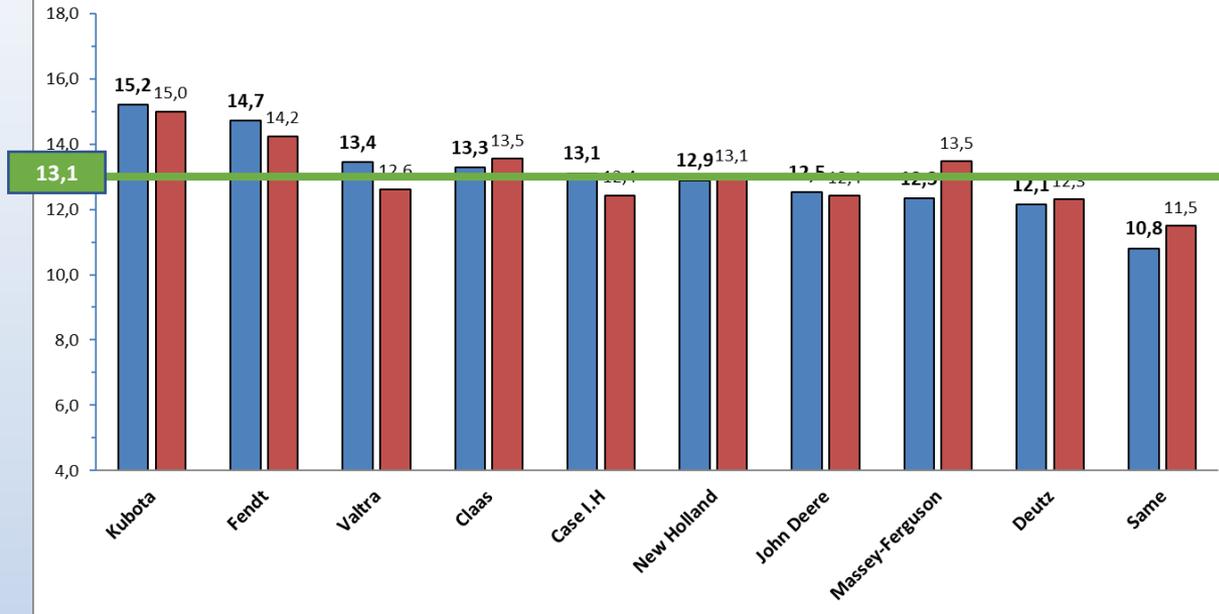
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Evolution of each brand 2018/2017



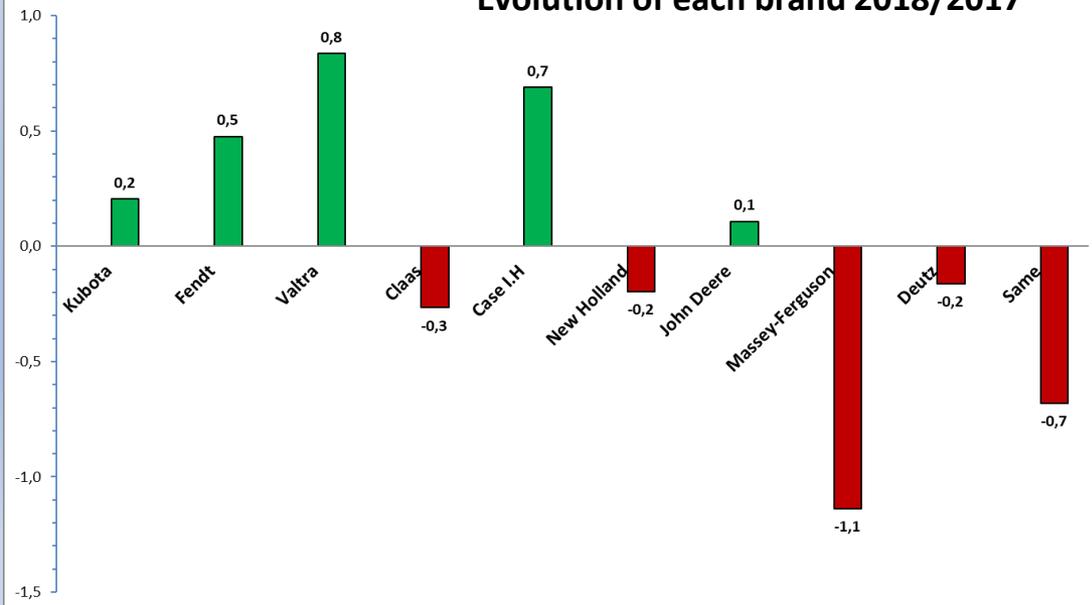
8. TRAINING

■ 2018 ■ 2017

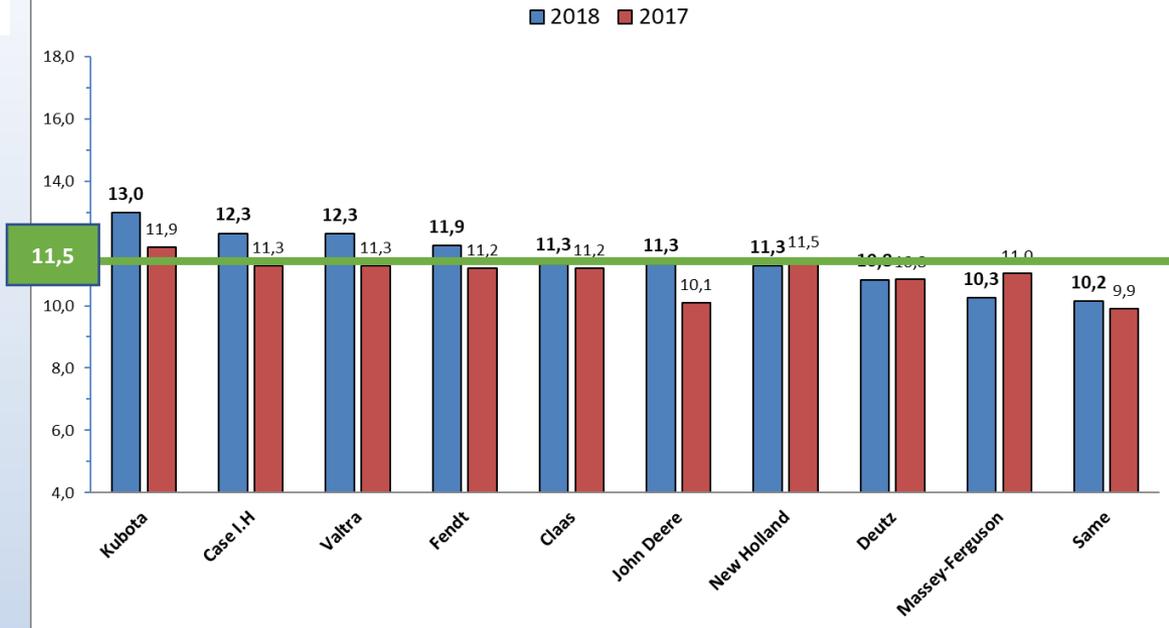


8. TRAINING

Evolution of each brand 2018/2017

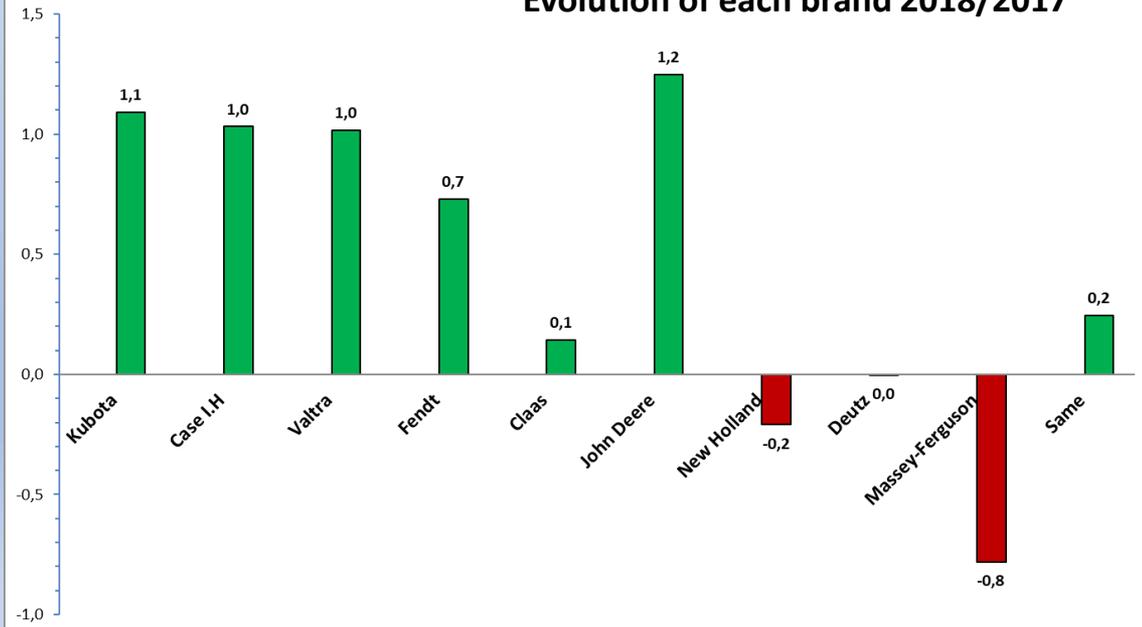


13. FINANCING OFFERS

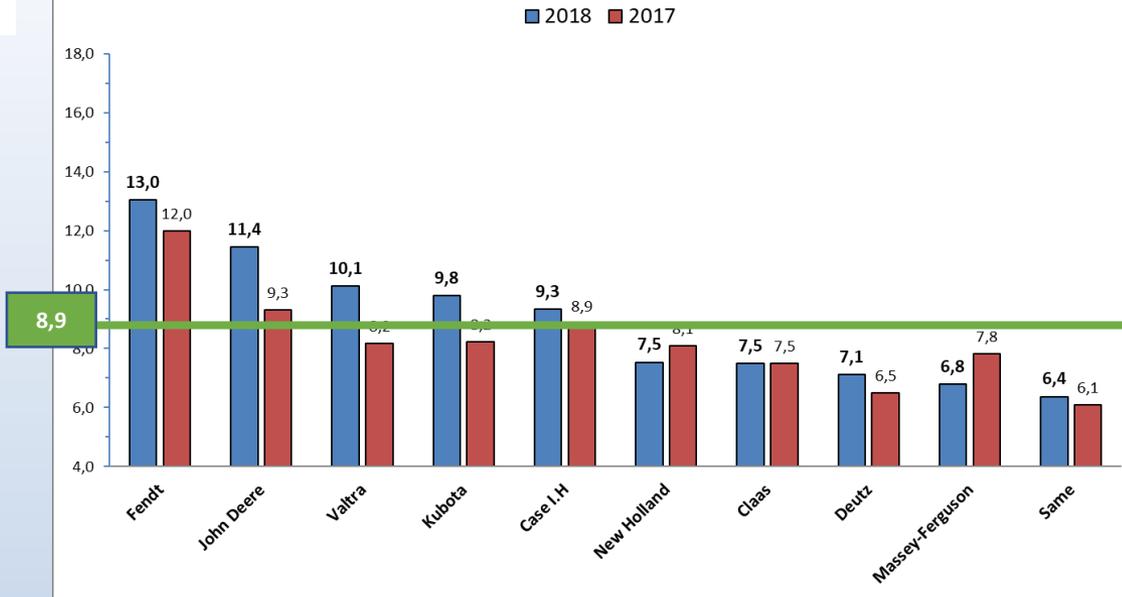


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Evolution of each brand 2018/2017

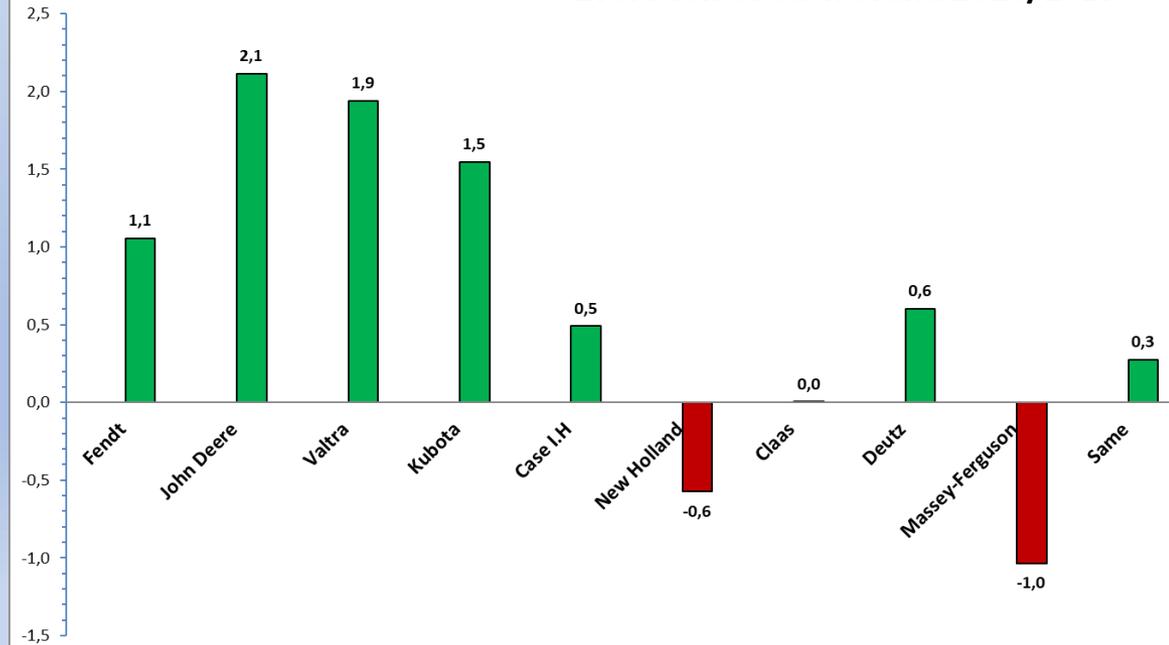


14. THEFT PROTECTION

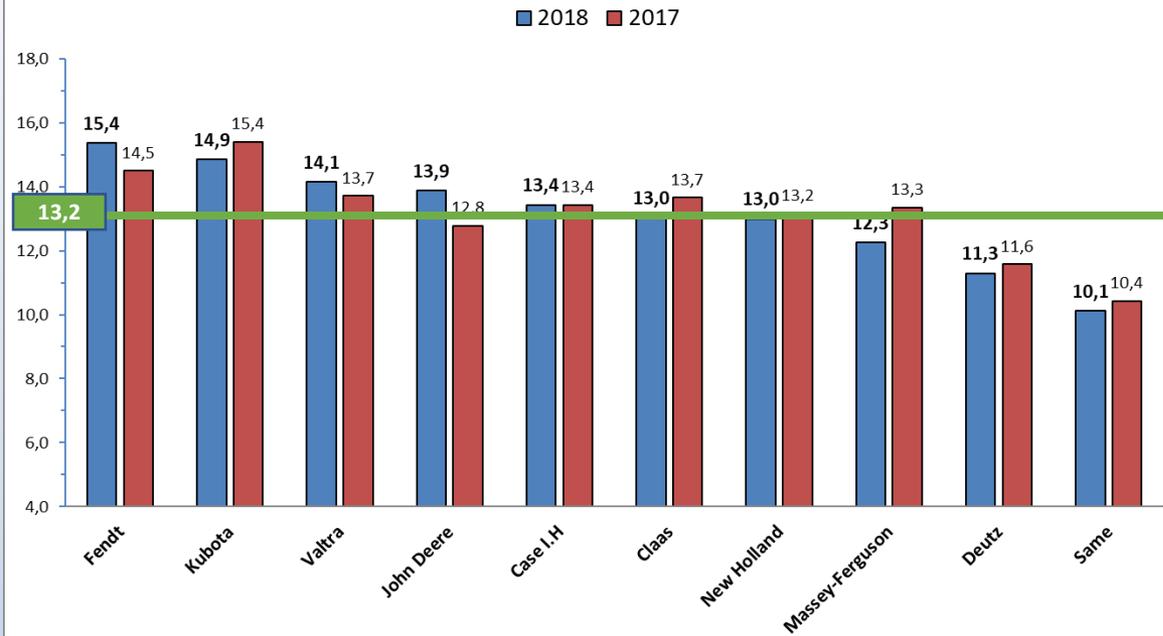


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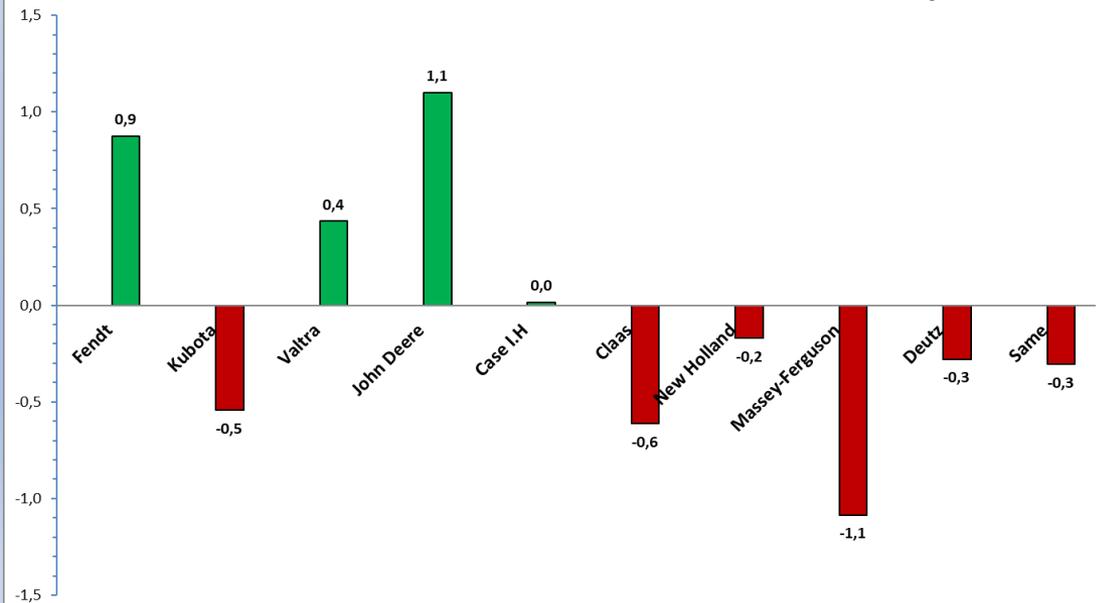


9. THE MANAGEMENT

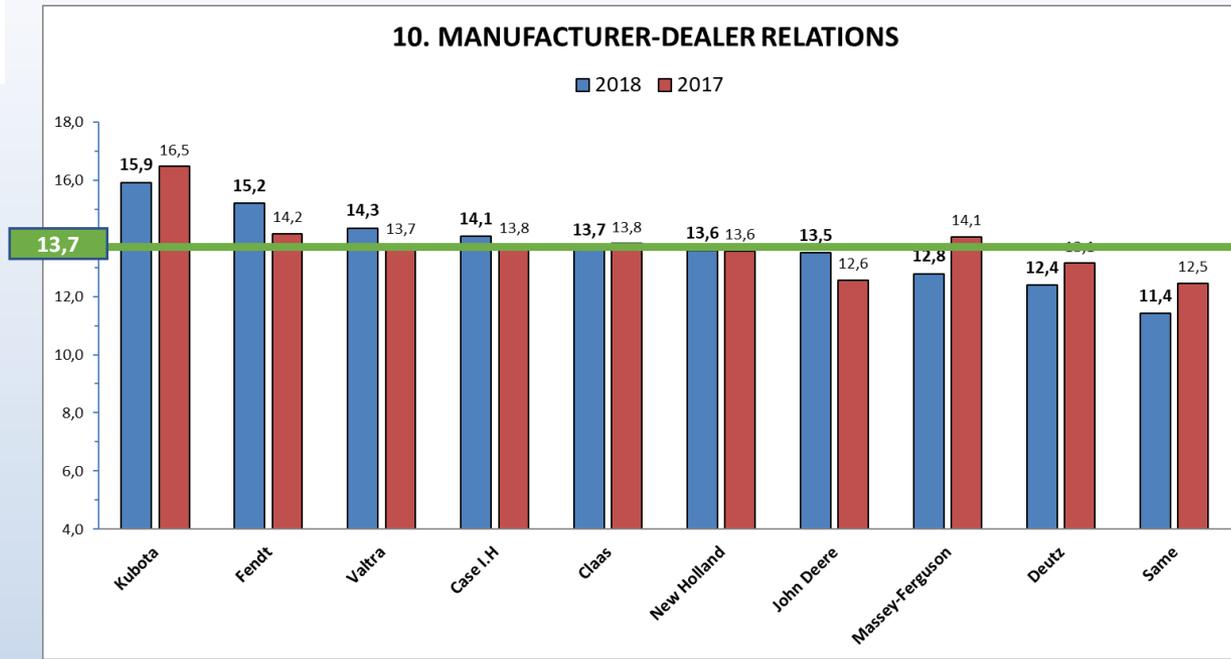


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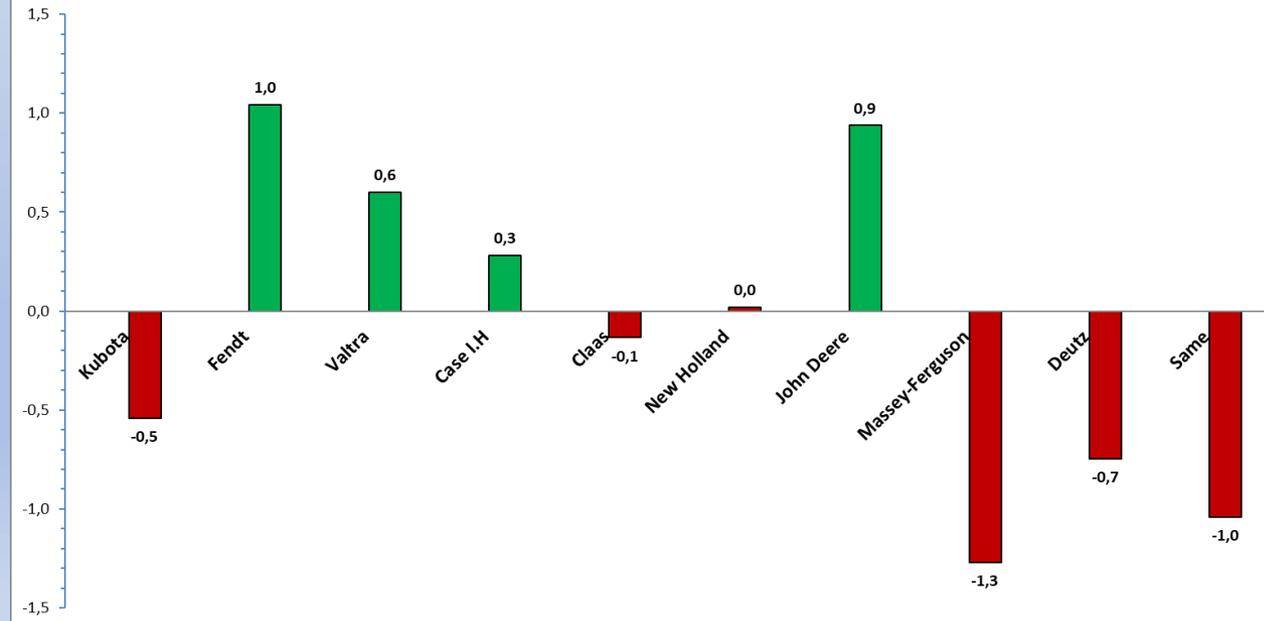


10. MANUFACTURER-DEALER RELATIONS

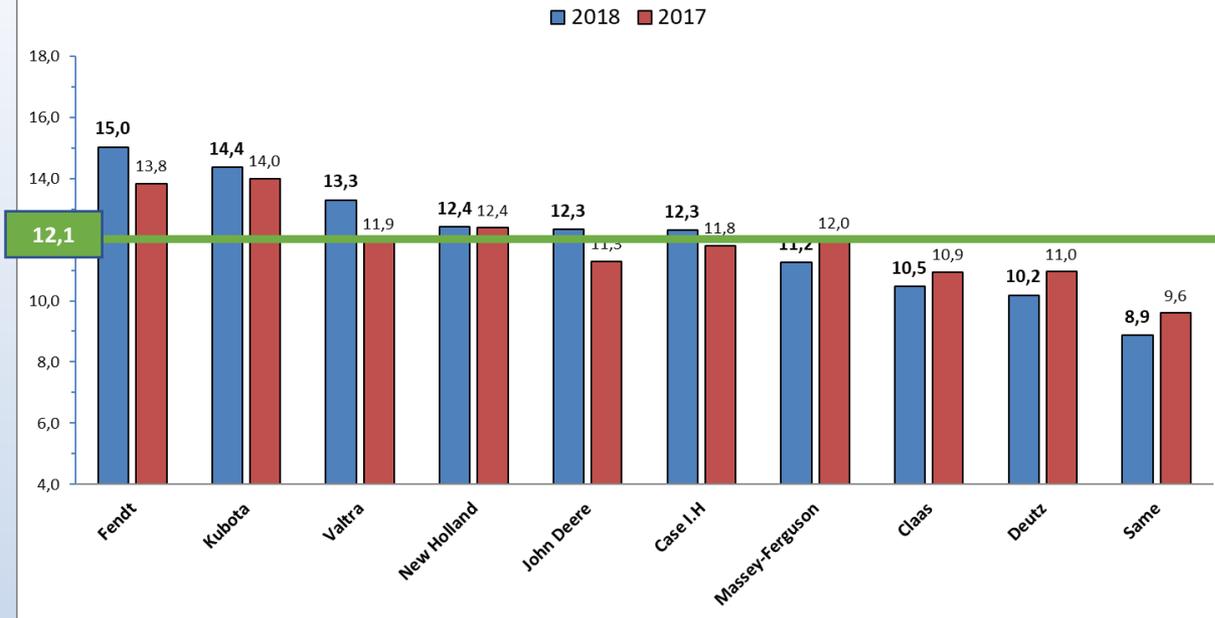


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Evolution of each brand 2018/2017

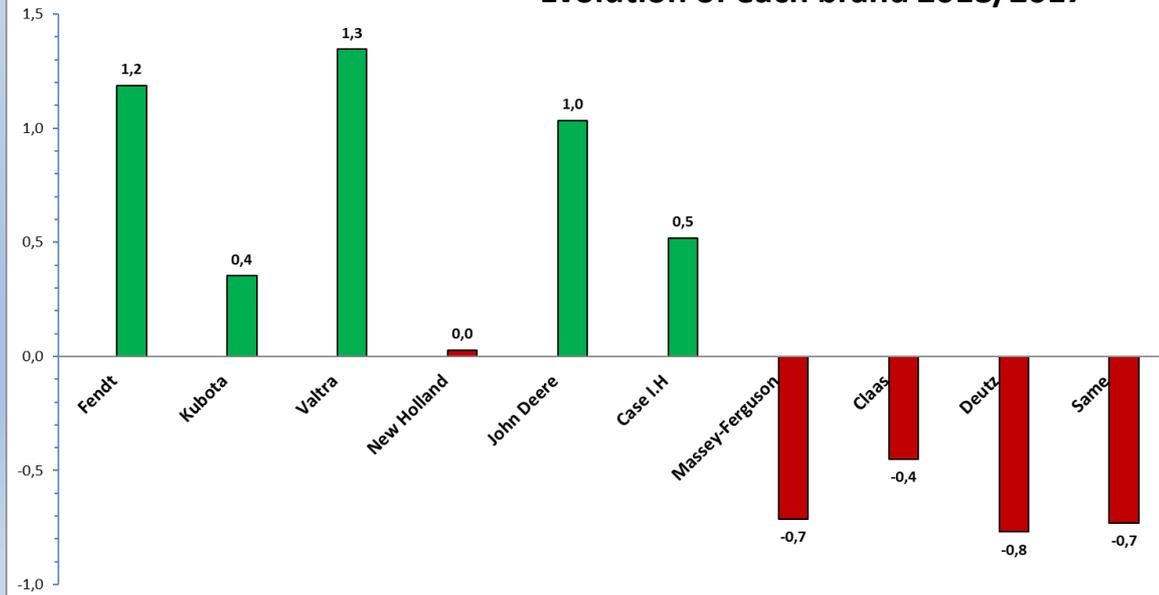


11. PROFITABILITY CONTRIBUTION

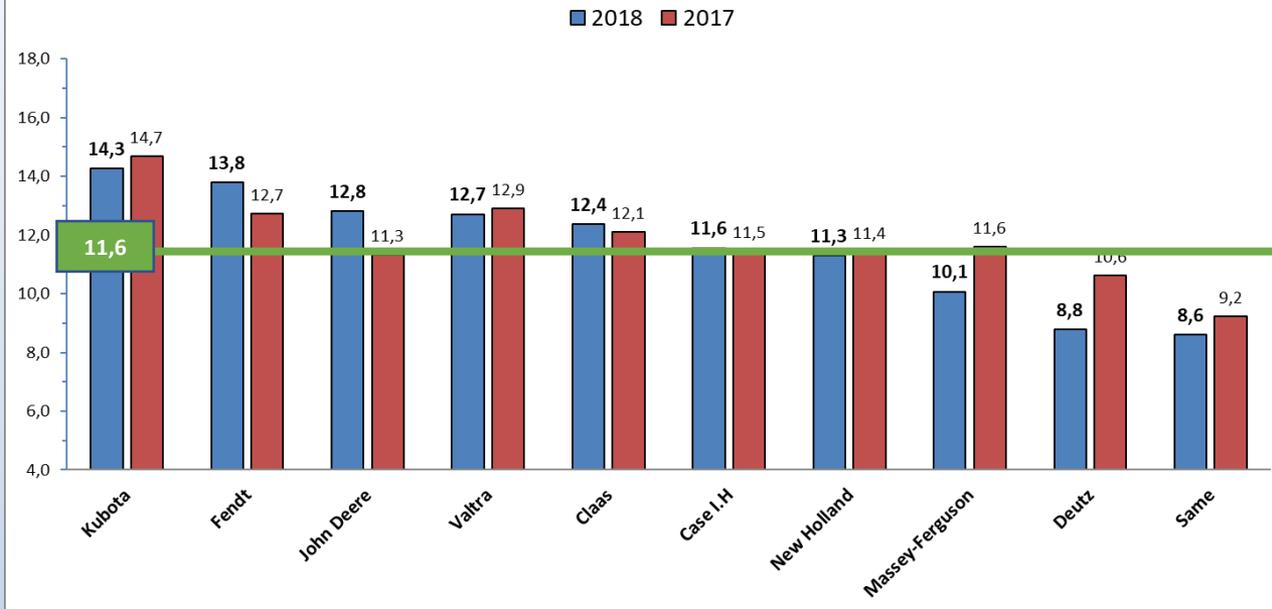


11. PROFITABILITY CONTRIBUTION

Evolution of each brand 2018/2017

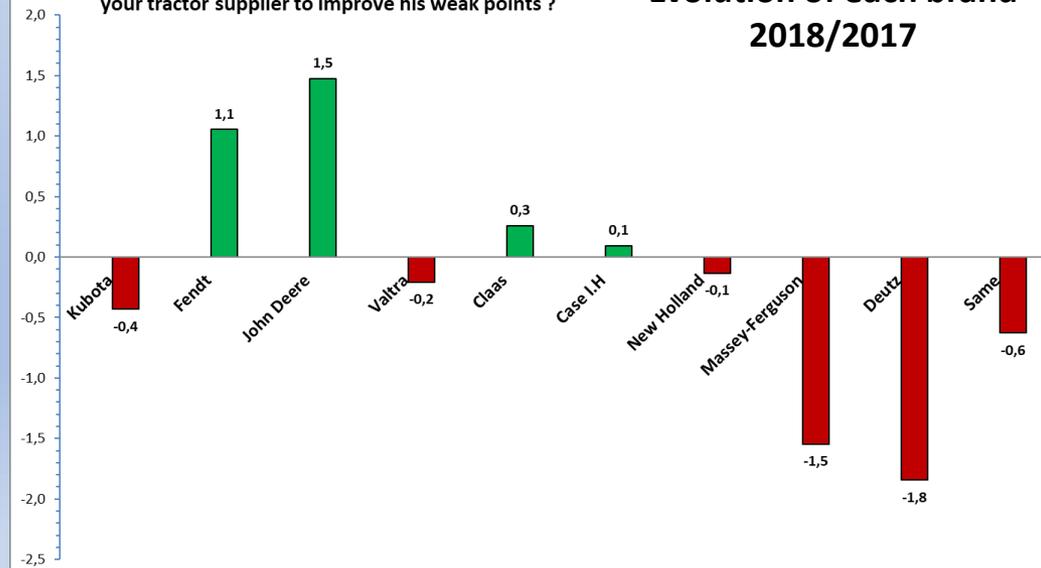


12 a. How much do you appreciate the willingness of your tractor supplier to improve his weak points ?



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Evolution of each brand 2018/2017



PART III:

PROGRESSION OF EACH BRAND

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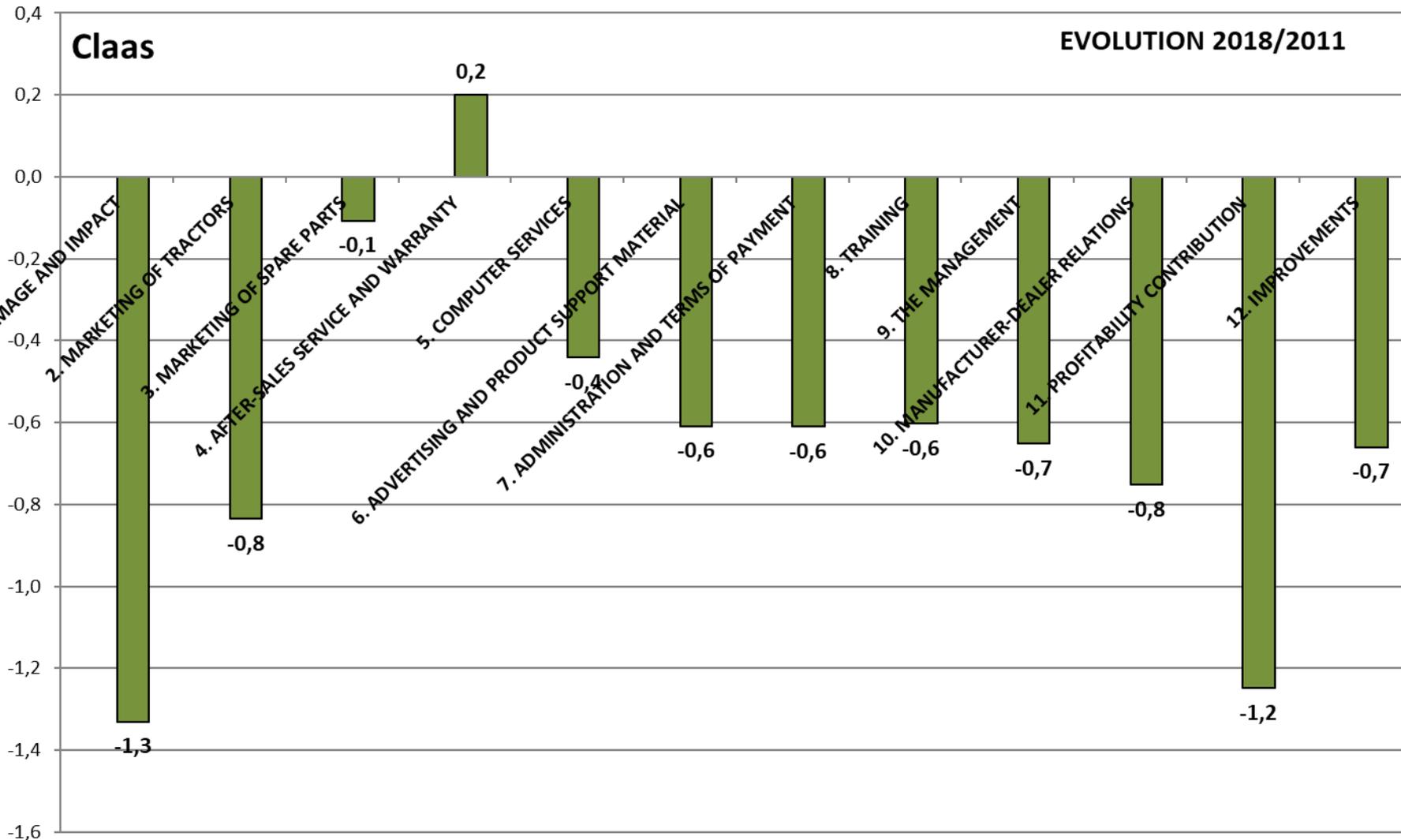
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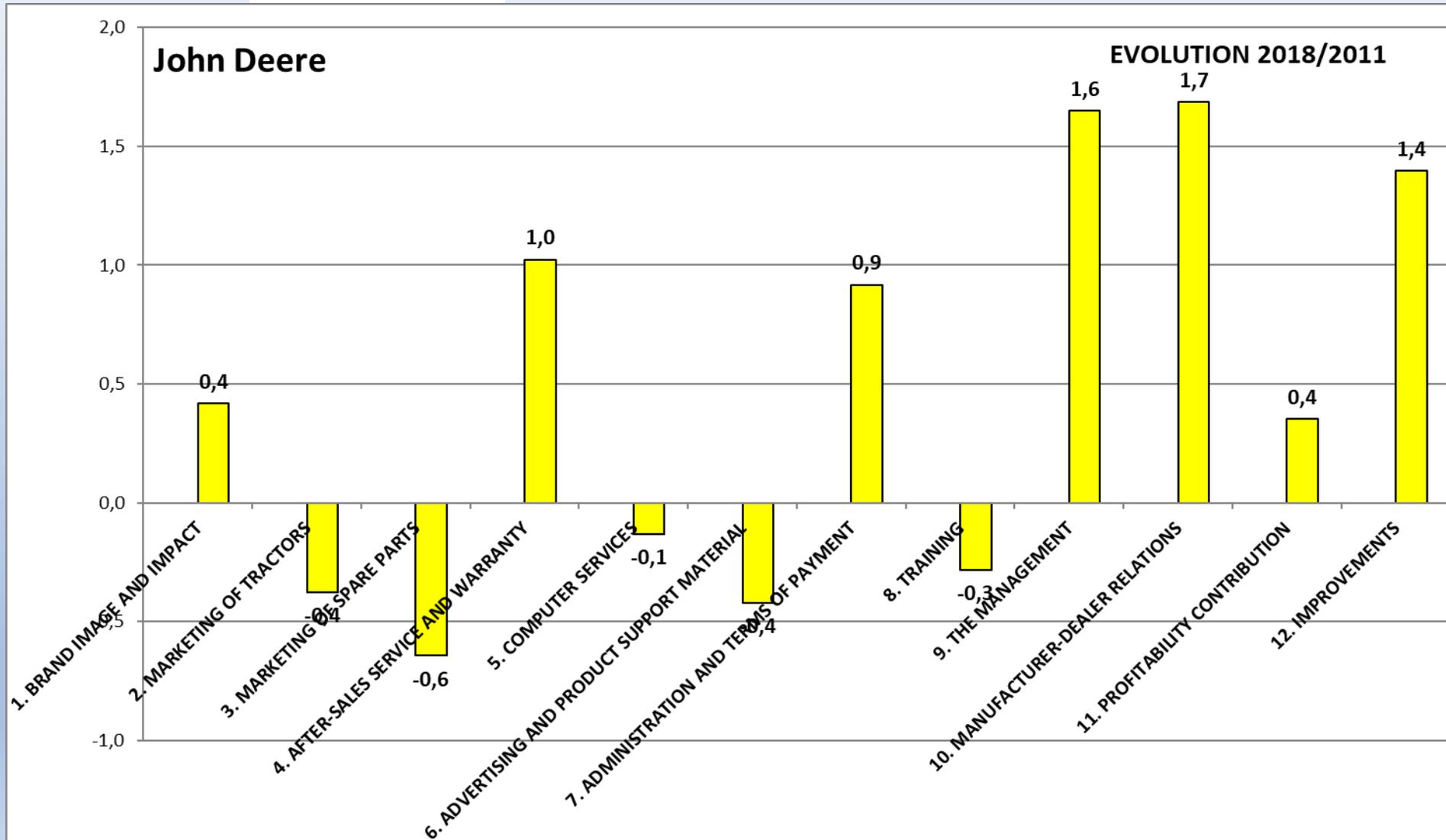


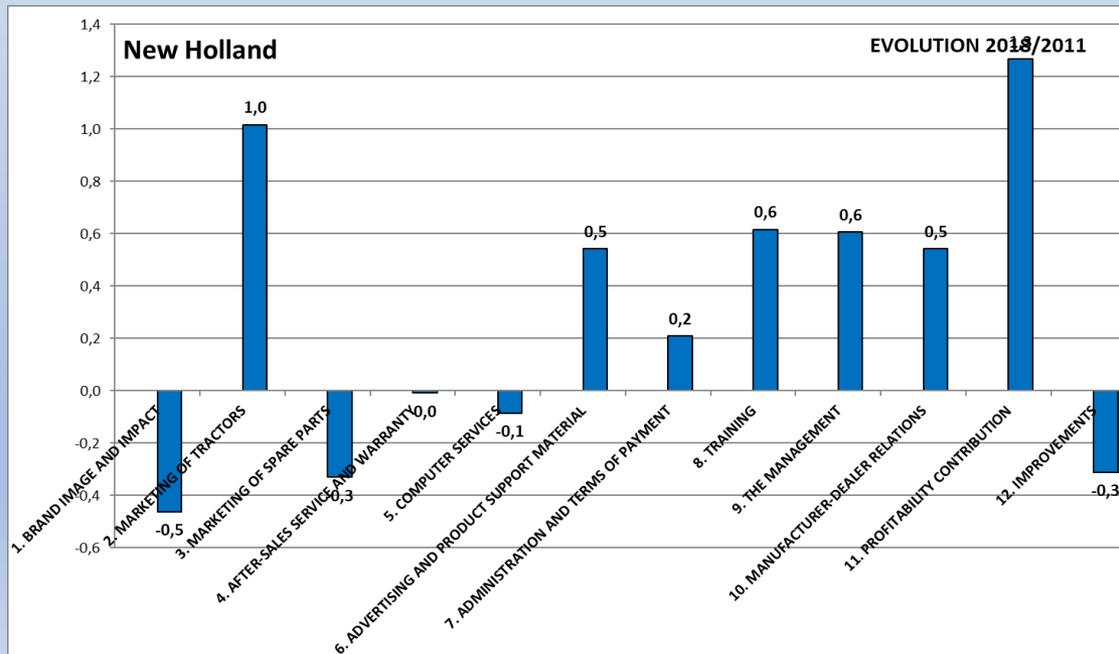
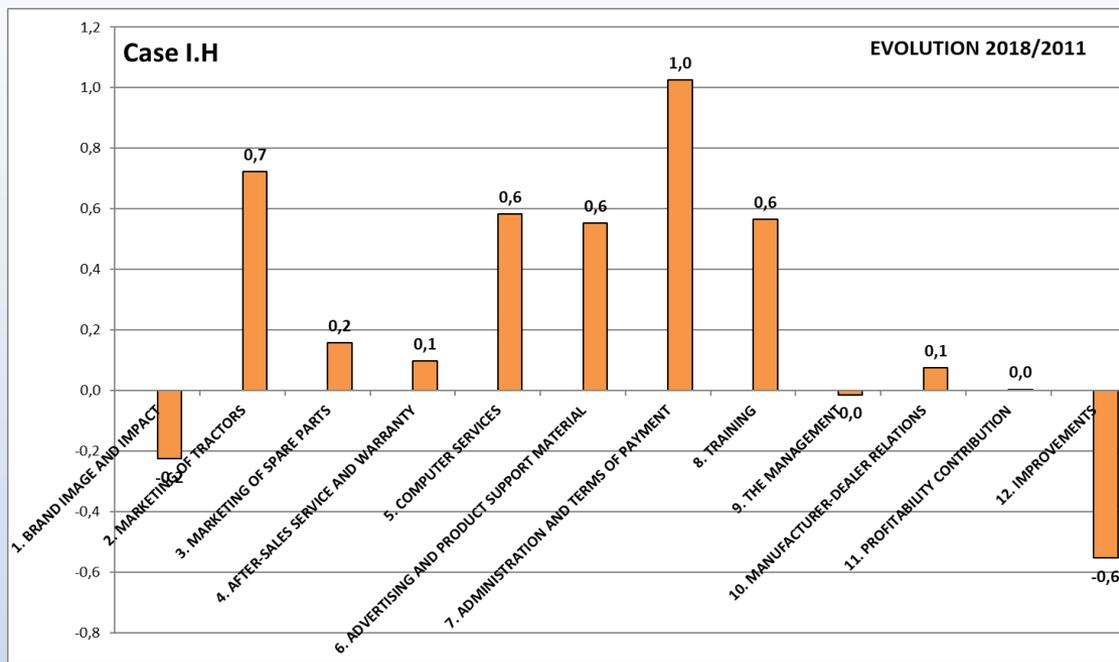


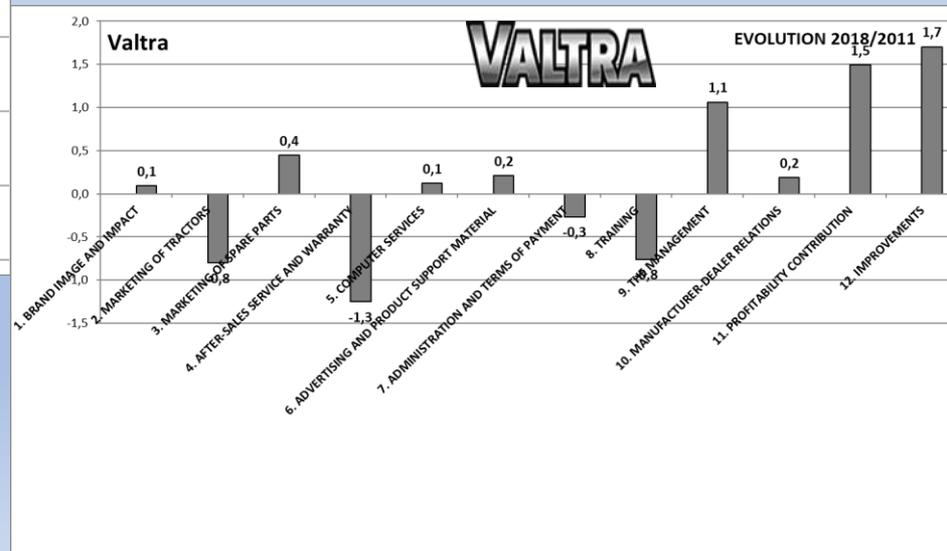
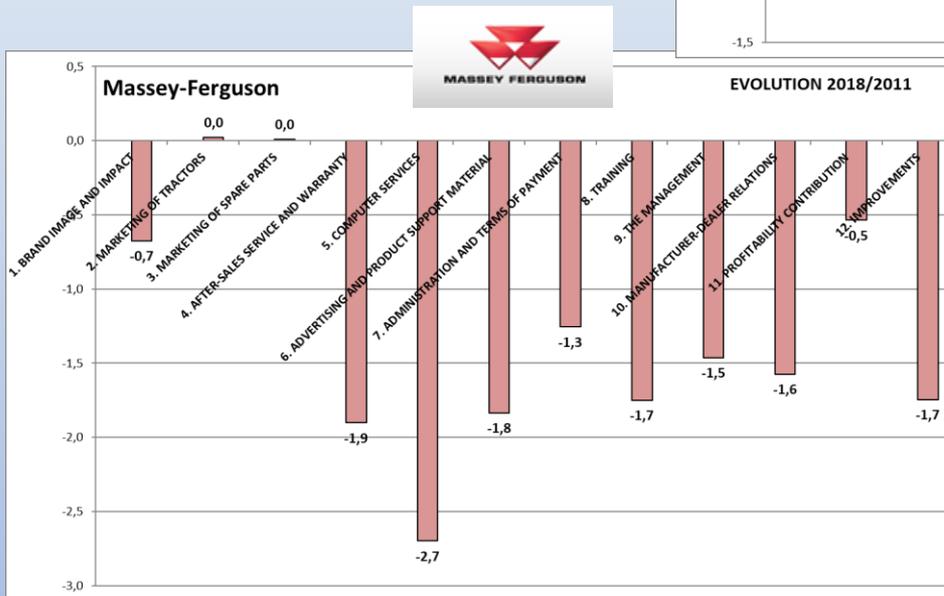
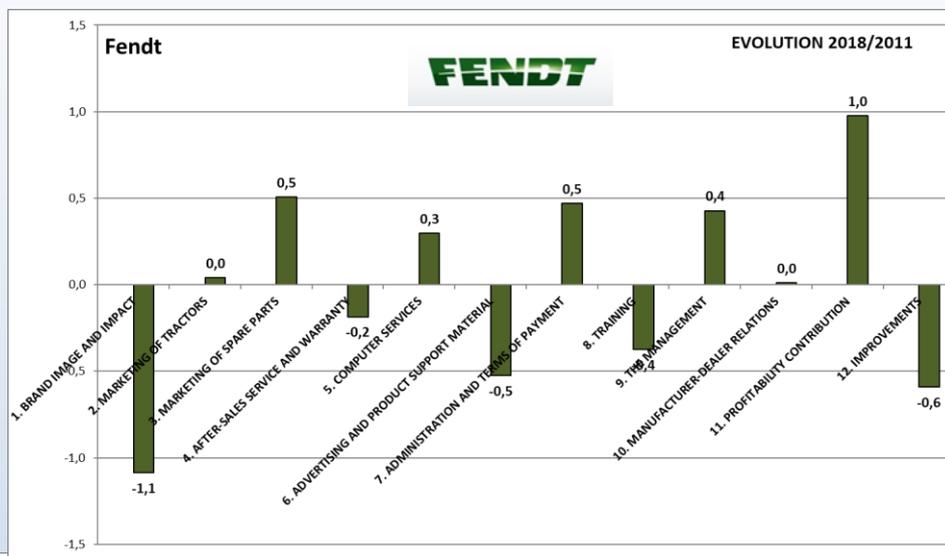
Claas

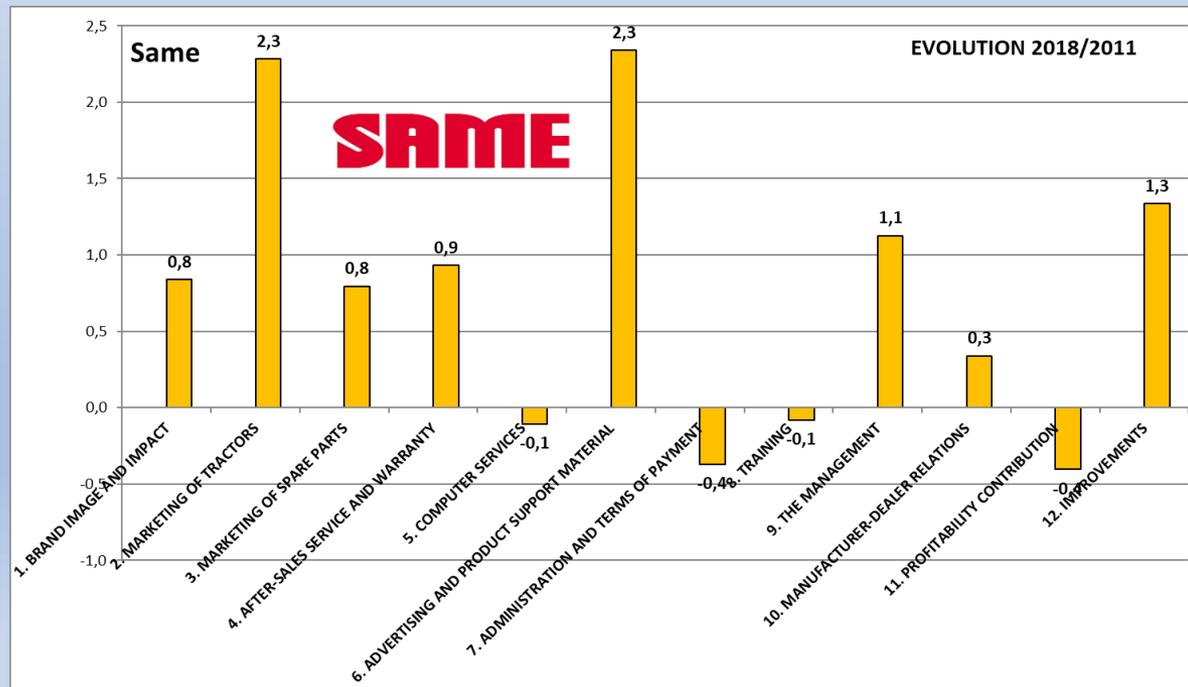
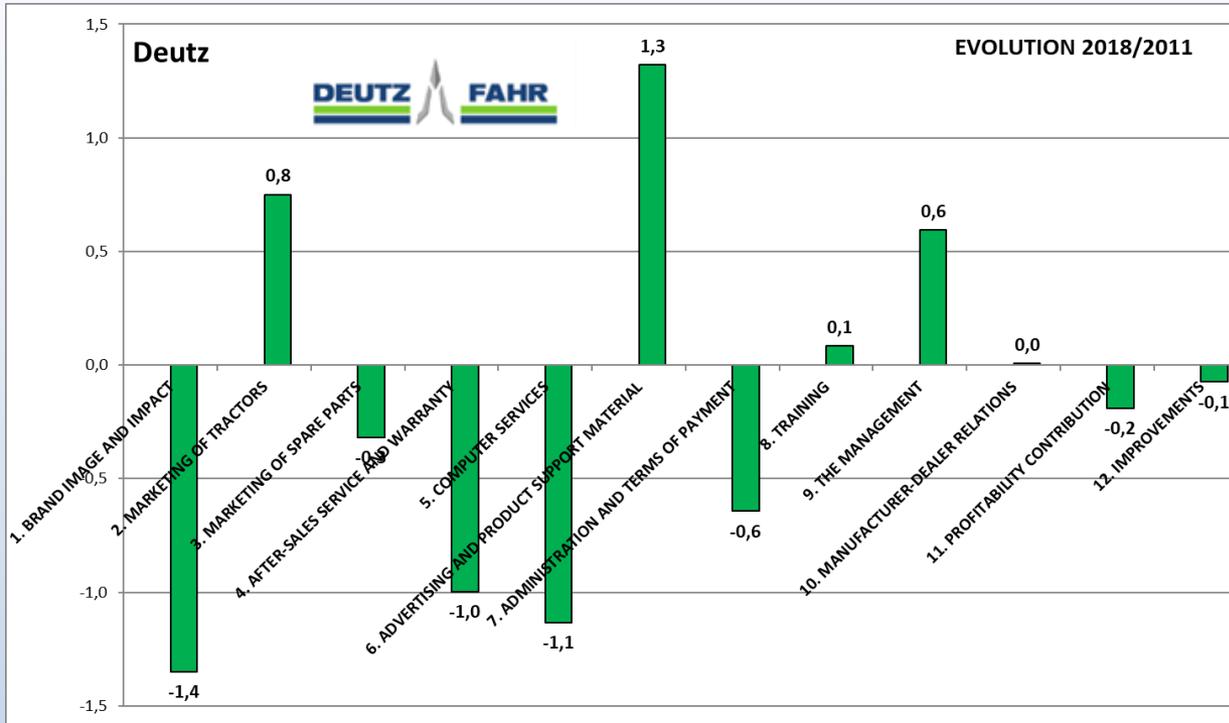
EVOLUTION 2018/2011



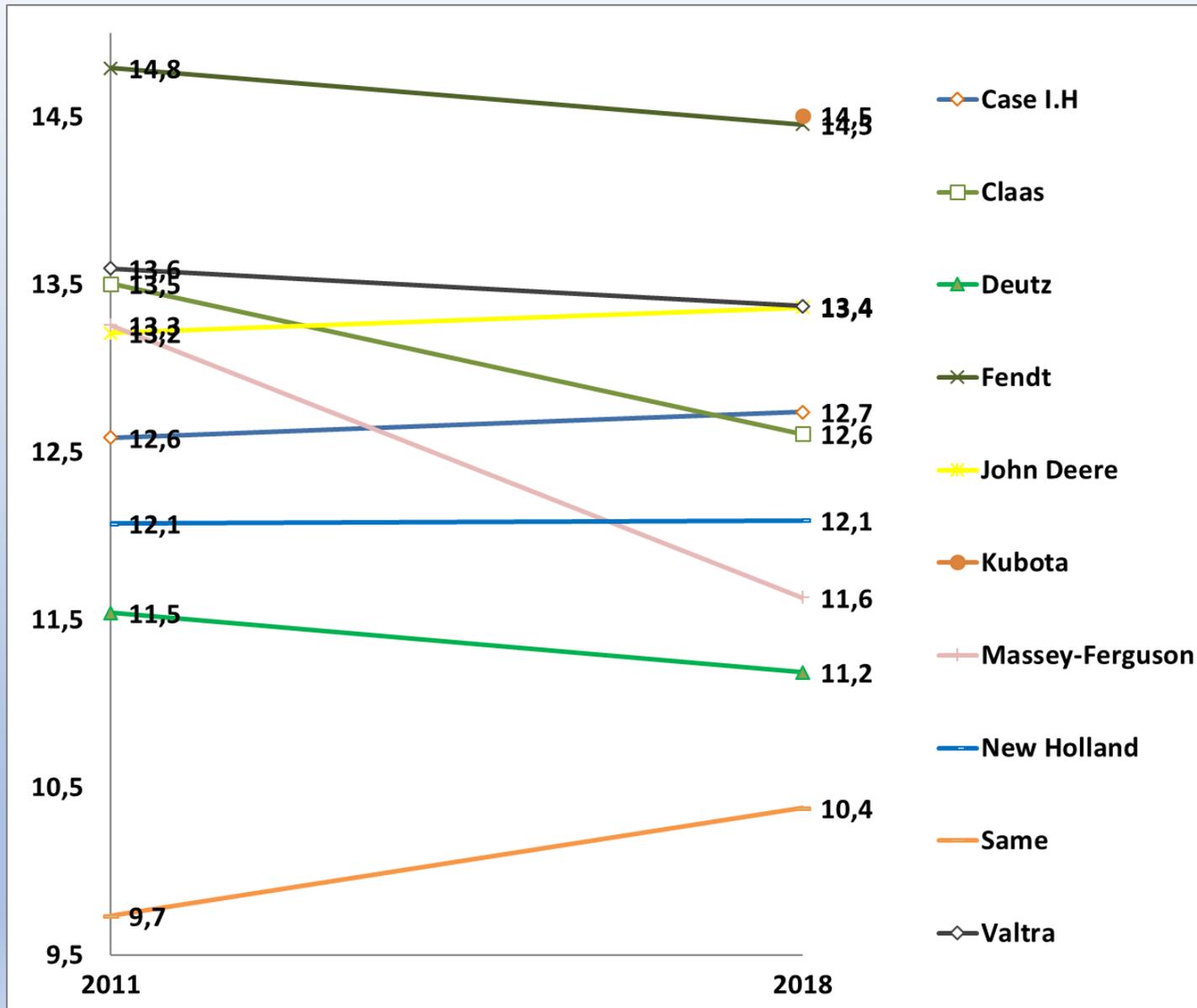








Evolution of the general average 2018/2011



INFORMATIONS

- On the DSI 2018 results an press release will be sent out after the Congress in October
- The brand specific results will be sent to the European HQ's of the manufacturers together with an invitation for starting a dialogue with them on the results
- Next DSI survey will start in the second week of april 2019

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