

# Brand Survey 2022

**Global results +  
example of a detailed  
brand review**



PART 1:

# Introduction

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

For almost 40 years,

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

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

Every month,

**1,000,000**  
**visitors**

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

**160,000**

machinery and equipment specifications and technical details.

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



# The success of any business depends on its brand identity:



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

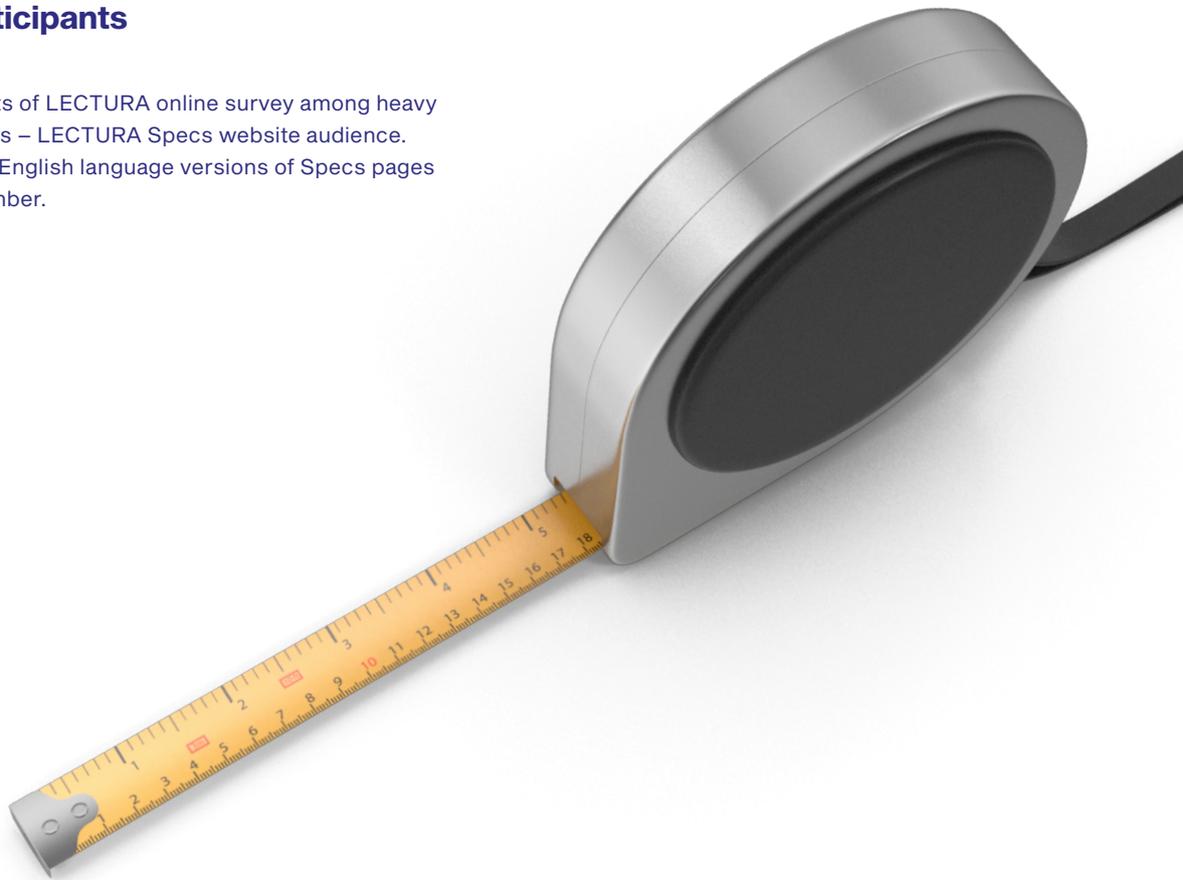
Anyone would probably be able to name a few brands from, for example, the automotive or fashion industries that he or she perceives as a premium brand – and there is a great possibility that they would be true based on many rankings, studies, whitepapers, public opinions, historical achievements, brand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

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

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

## Methodology and Participants

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



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

From these,

**92 most frequently  
reviewed brands  
were selected**

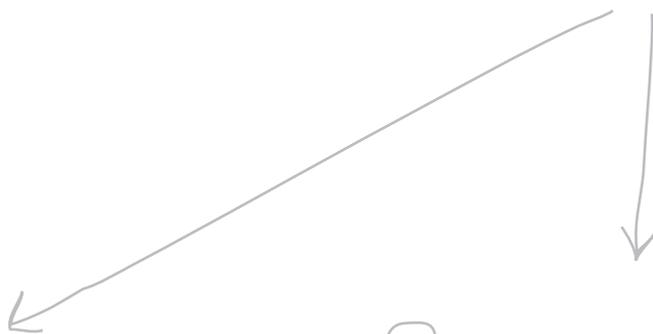
to serve as the basis for the current  
paper as well as brand-tailored  
individual reports.

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

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

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

## LECTURA BrandSurvey is a winning market research tool for both



### The audience:

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



### The brands:

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

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

PART 2:

# Executive summary

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

# 52,644 reviews of 892 brands

(Construction, Agriculture, Material Handling, Transportation)

## Survey sections:

<b>General brand evaluation</b>	<b>Products and services</b>	<b>Media visibility</b>	<b>92 most frequently reviewed brands (42,202 reviews in total)</b>
<b>Online presentation</b>	<b>Dealership network</b>	<b>Competitors</b>	

(Specific sample sizes for each question may vary)

## Respondents from all around the world

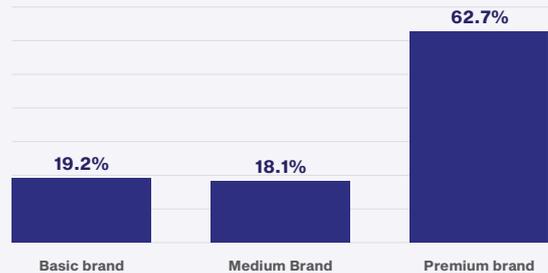
Region	Country	Count
<b>Europe (N = 16236):</b>	Åland	3
	Albania	90
	Andorra	1
	Austria	79
	Belarus	25
	Belgium	283
	Bosnia and Herzegovina	90
	Bulgaria	232
	Croatia	420
	Cyprus	76
	Czechia	176
	Denmark	600
	Estonia	122
	Faroe Islands	15
	Finland	637
	France	184
	Germany	281
	Greece	363
	Guernsey	6
	Hungary	377
	Iceland	86
	Ireland	1138
	Isle of Man	14
	Italy	162
	Jersey	11
	Kosovo	31
	Latvia	153
	Lichtenstein	1
	Lithuania	218
	Luxembourg	21
	Macedonia	81
	Malta	40
	Moldova	30
	Monaco	1
	Montenegro	26
Netherlands	510	
Norway	995	
Poland	129	
Portugal	420	
Romania	746	
Serbia	288	
Slovakia	177	
Slovenia	312	
Spain	120	
Svalbard and Jan Mayen	1	
Sweden	1167	
Switzerland	62	
Ukraine	65	
United Kingdom	5156	
<b>Asia (N = 5398):</b>	Afghanistan	17
	Armenia	9
	Azerbaijan	37
	Bahrain	15
	Bangladesh	114
	Bhutan	6
	Brunei	9
	Cambodia	37
	China	73
	Georgia	45
	Hong Kong	111
	India	1086
	Indonesia	612
	Iran	2
	Iraq	79
	Israel	102
	Japan	121
	Jordan	34
	Kazakhstan	24
	Kuwait	40
Kyrgyzstan	5	
Laos	41	
Lebanon	39	
Macao	4	
Malaysia	263	
Maldives	13	
Mongolia	124	
Myanmar (Burma)	65	
Nepal	29	
North Korea	1	
Oman	52	
Pakistan	213	
Palestine	20	
Philippines	286	
Qatar	95	
Russia	98	
Saudi Arabia	206	
Singapore	148	
South Korea	89	
Sri Lanka	120	
Syria	1	
Taiwan	68	
Tajikistan	2	
Thailand	208	
Turkey	119	
United Arab Emirates	258	
Uzbekistan	27	
Vietnam	206	
Yemen	25	
<b>Africa (N = 2826):</b>	Algeria	45
	Angola	42
	Benin	3
	Botswana	66
	Burkina Faso	8
	Burundi	9
	Cameroon	12
	Cape Verde	3
	Central African Republic	1
	Chad	2
	Congo	30
	Djibouti	8
	Egypt	185
	Eritrea	4
	Ethiopia	118
Gabon	10	
Gambia	1	
Ghana	77	
Ivory Coast	13	
Kenya	184	
Lesotho	15	
Liberia	8	
Libya	42	
Madagascar	12	
Malawi	5	
Mali	8	
Mauritania	11	
Mauritius	31	
Mayotte	1	
Morocco	31	
Mozambique	48	
Namibia	49	
Niger	1	
Nigeria	136	
Republic of the Congo	2	
Rwanda	5	
Reunion	4	
Senegal	5	
Seychelles	8	
Sierra Leone	16	
Somalia	14	
South Africa	1125	
South Sudan	7	
Sudan	36	
Swaziland	22	
Tanzania	101	
Togo	1	
Tunisia	13	
Uganda	40	
Zambia	75	
Zimbabwe	127	
<b>North America (N = 13456):</b>	Anquilla	3
	Antigua and Barbuda	2
	Aruba	3
	Bahamas	15
	Barbados	20
	Belize	12
	Bermuda	4
	Bonaire	4
	British Virgin Islands	1
	Canada	2715
Cayman Islands	2	
Costa Rica	20	
Curacao	6	
Dominica	2	
Dominican Republic	20	
El Salvador	7	
Greenland	10	
Grenada	1	
Guadeloupe	2	
Guatemala	21	
Haiti	4	
Honduras	12	
Jamaica	37	
Martinique	1	
Nicaragua	120	
Nicaragua	4	
Panama	14	
Puerto Rico	29	
Saint Kitts and Nevis	3	
Saint Lucia	12	
Saint Martin	1	
Saint Vincent and the Grenadines	2	
Sint Marteen	3	
Trinidad and Tobago	30	
Turks and Caicos Islands	2	
U.S. Virgin Islands	1	
United States	10309	
<b>Oceania (N = 3773):</b>	American Samoa	10
	Australia	2994
	Cook Islands	3
	Fiji	18
	French Polynesia	9
	Guam	15
	Kiribati	1
	Micronesia	1
	New Caledonia	5
	New Zealand	672
Norfolk Island	1	
Northern Mariana Island	1	
Palau	1	
Papua new Guinea	36	
<b>South America (N = 528):</b>	Argentina	46
	Bolivia	8
	Brazil	226
	Chile	34
	Colombia	52
	Ecuador	23
	Falkland Islands	1
	French Guiana	1
	Guyana	26
	Paraguay	7
Peru	38	
Suriname	36	
Uruguay	14	
Venezuela	16	

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

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

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

Average brand evaluation



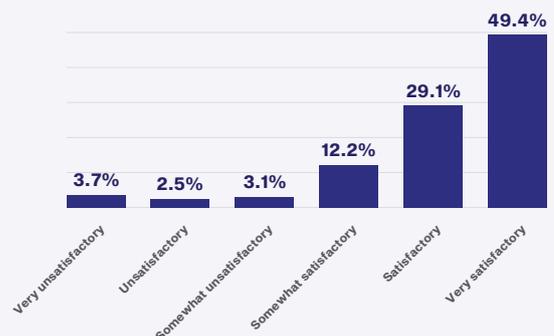
# 2 How would you rate this brand's dealership network in your country?

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

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

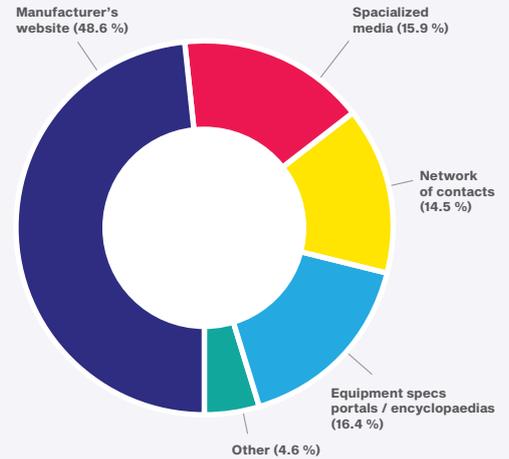
In this survey, **87.9% of respondents are satisfied** with a dealership network of the evaluated brand in their country. As the map indicates, the satisfaction levels vary based on the country.

Average satisfaction



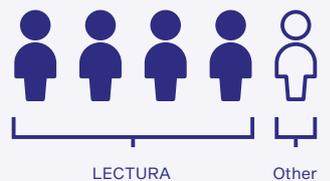
# 3 Where do you mostly look for information about this brand and its products/services?

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



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

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



# 5

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

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



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

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

# Global results: Construction & Lifting

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

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

# 1

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

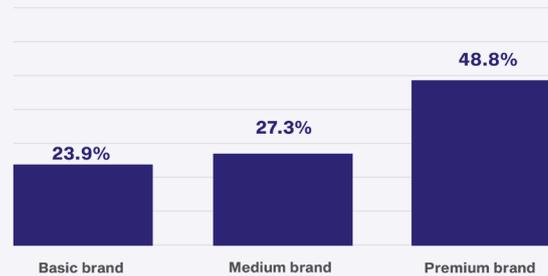
In general, construction and lifting equipment manufacturers are perceived rather positively. Almost **50%** of respondents evaluated the brand they were rating as a brand of **premium quality**. About a third think construction and lifting manufacturers would need to improve to some extent – thus, review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

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

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

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

### Average brand evaluation



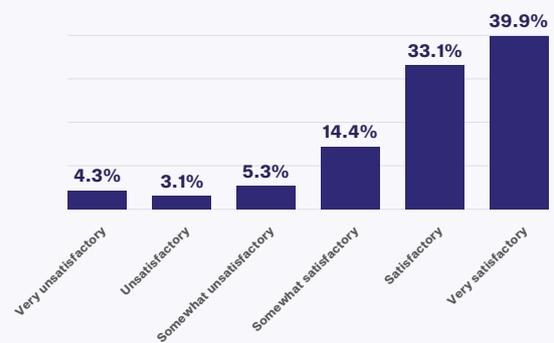
1	Liebherr	3.94 out of 5
2	Caterpillar	3.87 out of 5
3	John Deere Construction	3.84 out of 5
4	Kubota	3.74 out of 5
5	Volvo	3.70 out of 5

# 2

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

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

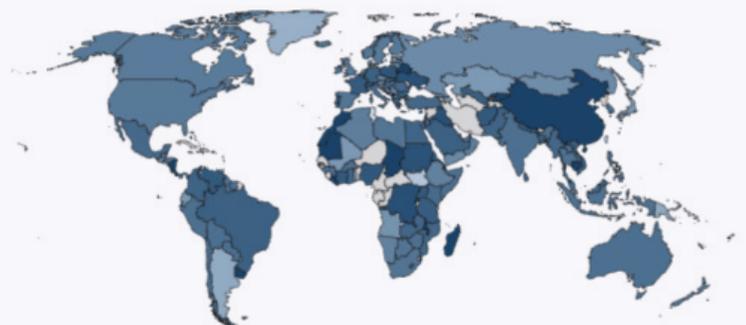
In the construction and lifting industry, **87.4% of respondents are to some extent satisfied** with a dealership network in their country. Actually, **39.9% would even rate the dealership network as very satisfactory**. On a scale from 1 to 6 (1: very unsatisfactory – 6: very satisfactory), **the average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



On a level of specific brands, companies with the best dealership networks are Vögele: **M = 5.33**; Grove: **M = 5.27**; Bell / Dynapac: **M = 5.24**; Zoomlion: **M = 5.19**; Volvo: **M = 5.13**. Interestingly only one brand out of the top 5 brands in the previous rank appeared in this ranking - Volvo. It could be explained by the fact that for global brands, it might be difficult to maintain the quality of dealership networks in all countries (compared to brands that rather focus on operating in specific regions).

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

1	Vögele	5.33 out of 6
2	Grove	5.27 out of 6
3	Bell / Dynapac	5.24 out of 6
4	Zoomlion	5.19 out of 6
5	Volvo	5.13 out of 6



# 3

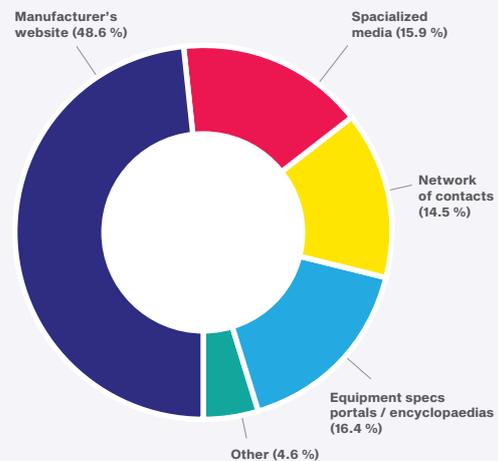
## Where do you mostly look for information about this brand and its products/services?

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

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

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

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

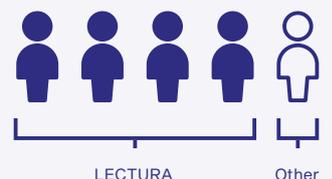


# 4

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

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

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

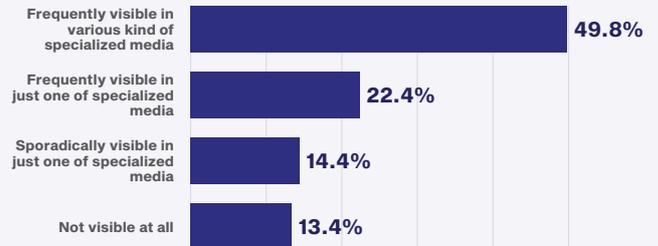


# 5

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

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

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



# JCB

Of the total 52644 replies received in LECTURA online survey from 8th September to 15th November 2021, **JCB received 2255 reviews from 117 countries from all around the world.**

That makes JCB **the second most often reviewed brand in this survey.** Most replies were received from the United Kingdom (the country origin of the brand), followed by the United States in second place and India (the continent with a really big British culture and economic influence).

# JCB

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

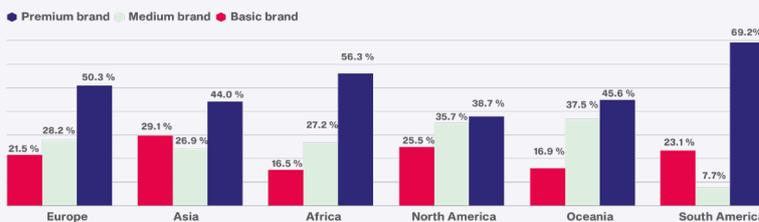
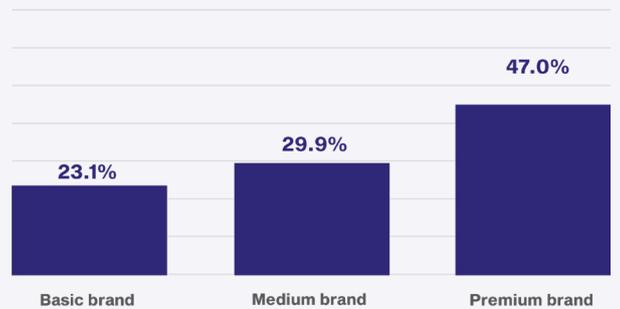
A vast majority of the survey's respondents (47.0%) claim that JCB is a brand of premium quality. About 29.9% would consider it better of a medium, and 23.1% of respondents think JCB is rather a brand of basic quality. On a scale from 1 as the basic level to 5 as the premium level, the mean value 3.48 represents people perceiving the brand quality on upper levels. Simply 5 from 10 survey respondents rated the brand as of premium quality, and only 2 from 10 people rate the brand as of a basic

quality speaking for a general satisfaction with evaluated brands.

Since the above-presented results are gathered from global data, it would be interesting to see the differences in the brand evaluation in different regions. On a scale from 1 (basic brand) to 5 (premium brand), the best evaluation was received in countries from South America – as the graph depicts, for each, 69.2% of people described JCB as the premium brand.

On the contrary, respondents from Asian and North American countries most frequently claimed JCB to be a basic brand. Such results do not appear to be surprising due to the British origin of the brand.

Average brand evaluation



# JCB

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

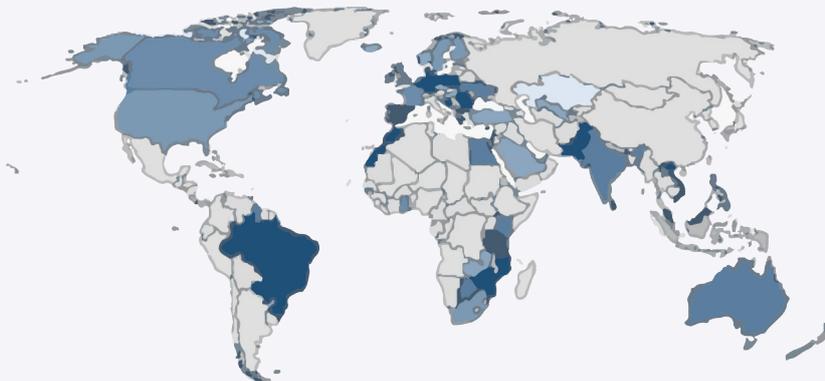
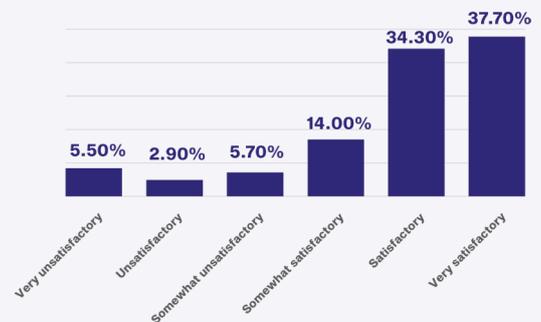
According to the survey results, JCB's dealership network is in general perceived by the respondents of the survey as a **very satisfactory brand (37.7%)**, followed by those who rated the brand's dealership possibilities in their country as **satisfactory (34.4%)**.

Only 2.9% of respondents think that there is space for improvement and

indicated the British manufacturer's number of dealers in general as **unsatisfactory**. However, a bigger percent (**5.5%**) perceive the company's dealership as **very unsatisfactory**.

Regarding specific regions and countries, the most satisfied respondents come from South America (Brazil and Paraguay), Pakistan and Vietnam in Asia; Europe (Germany, Poland,

Romania and Bulgaria) and Mozambique and Zimbabwe in Africa. On the other hand, there are still a couple of countries (for example, Kazakhstan and Indonesia) showing that there is **still room for improvement**. Also, there are many countries from which we lack the data.



# JCB

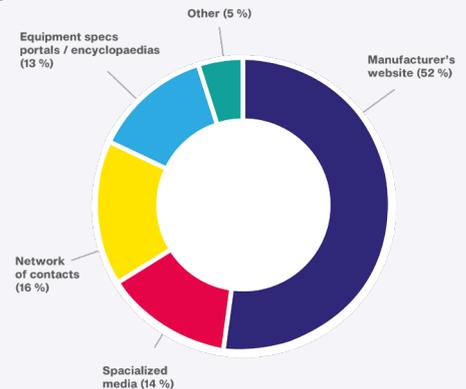
## 3 Where do you mostly look for information about this brand and its products/services?

According to 52.0% of respondents, **the most frequently used source of information about JCB is its own website**. This reflects the reliability and guarantee of up-to-date articles and news on the manufacturer’s webpage. The second most popular source of data among JCB’s audience are their own **network of contacts (16.0%)** and **specialized media (14.0%)**. This shows that, although the importance of specialized magazines and digital media is still quite big among the survey’s audience, more respondents chose to rely on their own sources and use the contacts they have/gathered on JCB’s conferences, events or meetings when they need to find relevant info about the brands products and services.

Equipment specification portals/ encyclopedias (13.0%) are also an important source of information for people who search relevant data about the brand’s machines.

To sum up, respondents clearly showed **the biggest interest in digital possibilities** (website) regarding the

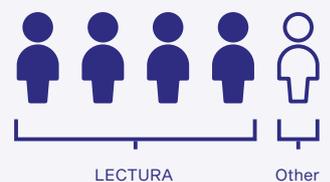
acquisition of information for JCB machines, which means that they find this particular source as being the most reliable/trustworthy and with the most relevant info as it comes from the manufacturer itself.



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

As analysed in the previous question result, 14.0% of respondents prefer to look up information about the JCB brand in specialized media and 13.0% on equipment specs portals and encyclopaedias. When asked to specify such portals and media: **76.8% of survey participants picked LECTURA prior to any**

**other source**, which means that **4 out of 5 users prefer LECTURA**. We are happy with this finding that supports the fact that our audience of LECTURA Specs has grown by 50% in the last two years and the Buyers Guide is currently visited by over 1 million users per month.

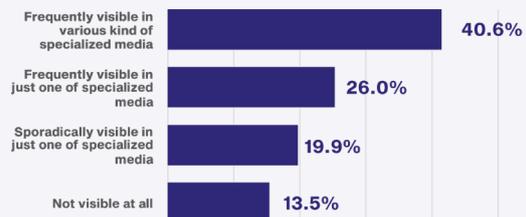


# JCB

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

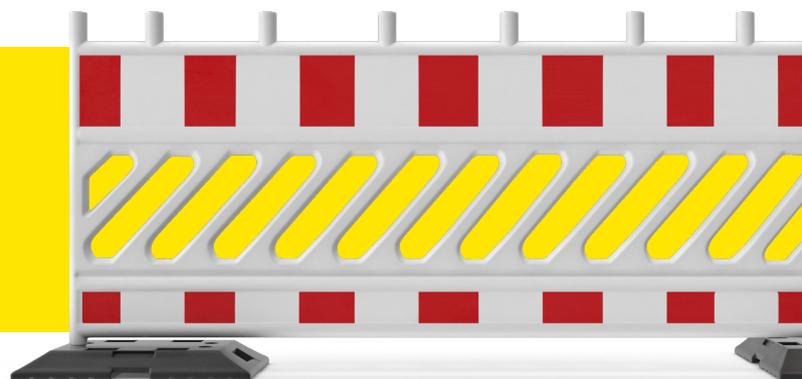
The majority (40.6%) of surveyees claimed that JCB is frequently visible in various kinds of specialized media. There is no doubt that **JCB considers visibility among media as being of high importance**, be it either printed or digital ones. Moreover, 26.0% of participants stated that JCB is frequently visible in one of specialized media and 19.9.% respondents announce the brand to be at least sporadically visible in just one of specialized media – bringing the **total brand awareness in specialized media to 86.5%**.

Only 13.5% of the respondents claimed that the British manufacturer has no visibility in specialized media at all. This may simply mean that maybe they did not come across such kinds of publications recently.



This is where the free part of this detailed brand report ends.

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



## ✓ Premium versions



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

### The premium versions include additional questions (6-15) and the corresponding results:

6. What machine type do you consider to be the best product of this brand?
7. When you think of the brand, what comes to mind first?
8. What other brand do you consider the most similar to the brand you are currently evaluating considering both the products portfolio and client's approach?
9. Is there any brand providing the same/similar kind of service/product you would rate better than the brand you are currently evaluating?
10. Recently, have you seen an advertisements for this brand in specialised media?
11. Through which channel was it presented?
12. What was communicated in these commercial ads?
13. Have you ever visited the webpage of the brand?
14. Have you found all the information that you were looking for on the webpage?
15. Please share a few things the brand you are currently evaluating can do better

**Would you like to purchase any of the premium reports? Do you have additional questions?**

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- Includes results for questions 1-15
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