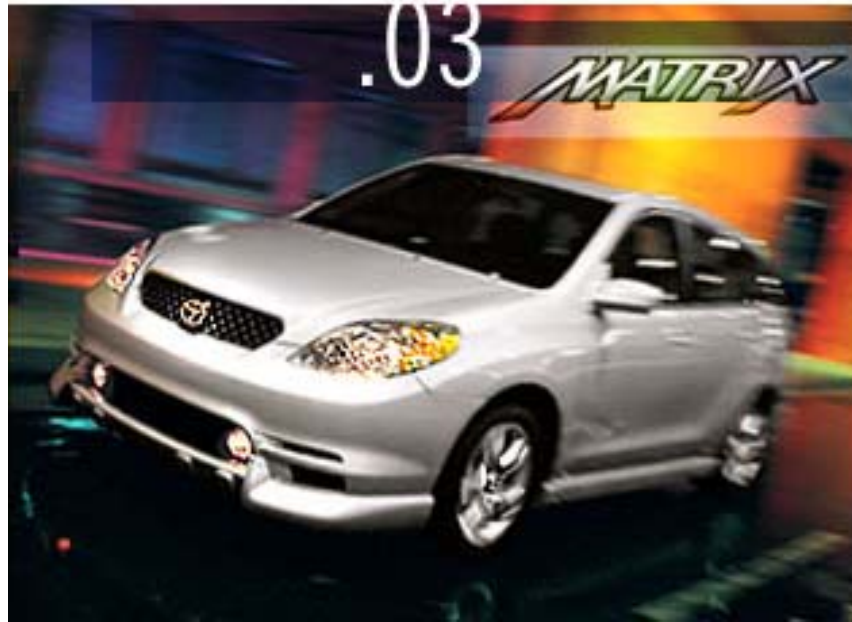


**American Advertising Federation**

**2003 National Student Advertising Competition  
Case Study**



**Presented by Toyota Motor Sales Corporate Advertising  
September 2002**



**AMERICAN ADVERTISING FEDERATION**  
THE UNIFYING VOICE FOR ADVERTISING™

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## **Web Sites**

Toyota Motor Sales	<a href="http://www.toyota.com">www.toyota.com</a>
American Advertising Federation	<a href="http://www.aaf.org">www.aaf.org</a>

## I. Assignment

The 2003 Matrix is Toyota's affordable, subcompact cross-over utility vehicle (CUV). Its youthful appeal and sporty style will conquest new buyers, especially within the youth market, and its added flexibility in an affordable package provides an alternative product for loyal Toyota owners.

Since its launch in February 2002, sales of the Matrix have been strong. Preliminary buyer data indicated a slightly higher median age than the target. While the data cover only two quarters of sales, Toyota Advertising would like to explore the possibilities of innovative and high-impact, youth-oriented marketing campaigns.



The assignment for NSAC participants is to present a recommendation to Toyota for implementing a special Matrix marketing and communication strategy with specific creative to reach the youth-market. The campaign objective is to re-energize Matrix in the marketplace with fresh ideas that will revitalize consumer interest. The model grade focus is the Matrix XR. The goal is to increase awareness by 5%, targeting 20-30-year-old potential buyers.

As an integral part of the assignment, students are required to shop the Matrix at local Toyota dealers to learn product features and positioning of the vehicle and to provide feedback to Toyota regarding the shopping experience (dealer locator available at [www.toyota.com](http://www.toyota.com)). For example, is the Matrix being sold as a wagon or a new cross-over vehicle? Additionally, how does the Matrix measure up against the Pontiac Vibe, Ford Focus ZX5, Mazda Protégé 5, etc.? The shopping process will provide insights as students form strategy and tactics for the campaign.

The campaign should address, but not be limited to the following:

- After reviewing current positioning of the Matrix, what changes, if any, should Toyota make to target youth (20-30-year-old) audience?
- What creative approach will best enable Toyota to achieve the objectives?
- What media plan should Toyota implement?
- What innovative creative materials for TV, print, Interactive, etc., should be used to achieve the objectives?
- What is needed in the overall integrated marketing plan to achieve our objectives? What is the role of advertising? public relations? direct marketing? promotions? special events marketing?
- What messages/concepts should be seeded that will benefit Toyota in the long term, as today's youth buyers mature and move to different life stages?
- After shopping the Matrix at dealerships, what are some areas of improvement Toyota should implement to provide a better sales experience for the Matrix customers?

The assignment is to create a national campaign, not dealer/local advertising. Expect Toyota to support the national integrated marketing and communication campaign with a \$35 million budget for 2004 model year (starting September 1, 2003). This budget must include all costs for media, creative development and production. Production budget should be limited to 10%. If promotions, special events, sponsorships and other lifestyle events are included, the budget for those should be limited to 2-5% of total.

Toyota will consider the selected national campaign for implementation. There is a strong possibility that some elements of the creative, such as print, will be executed.

Students may refer to the sections on Demographics and Toyota Advertising (Sections IV and V) for current strategy, which should not limit the exploration of new advertising strategy. Toyota is interested in new and innovative approaches to capture the youth market and encourages creativity in both strategy and execution.

## **II. Priorities**

### **1. Primary Elements**

- **Advertising Strategy**

Students are encouraged to be creative in strategy and tactics. The strategy should drive your creative work, media plan and promotions to accomplish the goals established for the assignment. It should clearly state the relevant, persuasive ideas that will focus and inspire creative execution.

- **Creative**

The clarity and thought process behind your creative work is most important, not production value. So focus on the "power of the idea" and creativity that are in sync with your advertising strategy to accomplish the assignment's objectives. Production is necessary only to communicate your creative concept effectively. This means, for example, for television concepts, your campaign ideas can be presented in either finished storyboard format or in video production. The "Get the feeling" theme and end tag must be integrated into the creative. The section on current Toyota advertising (Section V) is meant to be a reference, not necessarily a guideline, for your campaign.

- **Media**

Media can include both traditional media (print, radio, television, and outdoor) and non-traditional media (Interactive, direct, etc.). Toyota Advertising suggests that the final campaign include print and TV, but encourages you to keep in mind that media selection and scheduling can be very creative aspects of the overall communication. Sometimes the medium is the message, or at least an important contributor to the message.

## 2. Secondary Elements — Other Factors That May Be Included in the Campaign

- **Promotions**

Consider consumer awareness and incentive promotions as part of your campaign. Promotions can often be a more effective way to build awareness among the relevant target and can help mold the image you are trying to create for the new vehicle. Toyota is interested in marketing the Matrix on college campuses and promoting the special financing program available to college grads ([http://www.toyotafinancial.com/lease/college\\_grads.html](http://www.toyotafinancial.com/lease/college_grads.html)).

- **Auto Shows**

Auto shows play an important part in automotive marketing. They build consideration for Toyota products and communicate brand and retail messages. Attendees learn and inspect Toyota products up-close without the pressure of the retail process. Auto shows reach an estimated 19.6 million people. An estimated 70% of show attendees intend to purchase or lease a new vehicle within 12 months, and 67% of auto show attendees are between 18 to 44 years old.

- **External Affairs**

The product news group of the External Affairs Department conducts major media events to introduce new vehicles to the automotive press. Both print and electronic media from across the U.S. attend these events from which they get their first driving impressions as well as technical and marketing information about the new product. On a daily basis, the product news staff answers questions, coordinates interviews, develops press kit materials and disseminates product information to major daily newspapers, buff books and industry analysts. If PR events are to be included in your campaign, the only costs you need to consider are for materials and location. EAD will cover staffing costs.

## III. Product Information — What Is the Matrix?

- **Background**

The Matrix is a no-compromise, cross-category product that blends sporty style, utility, seating capacity and performance. With three grades and multiple drive types (5&6-speed manual transmissions, 4-speed automatic and 4WD). The Matrix reaches buyers who desire the flexibility of an SUV, style of a sporty subcompact and affordability of a subcompact. The projected volume is between 60,000 and 70,000 annually.



- **Model Grades**

The model lineup includes these three grades:

- Standard (Matrix) - Value-priced, affordable utility, for young families needing utility and versatility
- Upper (matrix XR) - Expressive, active, for young couples leading an active lifestyle who want a car that reflects their personalities
- Sport (Matrix XRS) - Versatile performance, for couples and singles desiring utility and sporty image, and strong engine performance

- **Key Selling Points**

Table 1 - Key Selling Points

Attribute	Benefit
Exterior Styling	Distinctive exterior design with aggressive character lines gives Matrix a sleek, futuristic, sporty silhouette outline. Available front/rear spoilers and side rocker panel ground effects create a low profile with an aerodynamic feel.
Versatility	Fold flat 2nd row and front passenger seats extend storage capability, rear hatch and fold flat seats are easy to operate, standard track system increases flexibility, spacious rear cargo area.
Performance/handling	130HP standard engine, 180HP performance engine available with 6-speed MT, 17" wheels — a first for Toyota.
Interior Styling	Optitron meters provide cockpit-like feeling, easy ingress/egress, accessible controls, seating comfort.
Price/Value	Available in three grades, Matrix provides versatility and roominess of small SUVs, but is more affordable.
QDR	Carries Toyota nameplate (QDR stands for quality, dependability and reliability).

- **2003 MY Pricing, Color and Specifications**

Table 2 – Pricing

Matrix Standard 2WD Manual	\$15,155
Matrix Standard 2WD Automatic	\$15,955
Matrix Standard 4WD Automatic	\$17,600
Matrix XR 2WD Manual	\$16,665
Matrix XR 2WD Automatic	\$17,465
Matrix XR 4WD Automatic	\$18,930
Matrix XRS 2WD 6-speed Manual	\$19,235
Matrix XRS 2WD Automatic*	\$19,815

\*Will not be available in 04 MY

Table 3 – Colors

<b>Exterior Colors</b>
Super White (040)
Lunar Mist Metallic (1C8)
Black (209)
Desert Sand Mica (4Q2)
Radiant Red (3L5)
Ice Blue Metallic (8Q5)
Indigo Ink Pearl (8P4)
<b>Interior</b>
Standard Dark Gray/Stone
XR/XRS Charcoal/Stone

Table 4 – Specifications

	Matrix	Matrix XR	Matrix XRS
<b>Engine:</b>	1.8 liter DOHC 16-Valve VVT-I 4-cylinder 130 hp @ 6,000 rpm 126 lb.-ft. @ 4,200 rpm	1.8-liter DOHC 16-valve VVT-I 4-cylinder 130 hp @ 6,000 rpm 126 lb.-ft. @ 4,200 rpm	1.8-liter DOHC 16-valve VVT-I 4-cylinder 180 hp @ 7,600 rpm 130 lb.-ft. @ 6,800 rpm
<b>Transmission:</b> 5-speed manual 6-speed manual 4-speed auto	Standard N/A Available, standard w/4WD	Standard N/A Available, standard w/4WD	N/A Standard Available
<b>Body Construction:</b>	Unitized body	Unitized Body	Unitized Body
<b>Drive train:</b>	Front engine, front- or 4-wheel drive (4WD available)	Front engine, front- or 4-wheel drive (4WD available)	Front engine, front-wheel drive
<b>Suspension:</b> 2 WD  4 WD	Independent MacPherson strut front, torsion beam rear suspension, with front and rear stabilizer bars  Independent MacPherson strut front, double wishbone rear suspension, with front and rear stabilizer bars	Independent MacPherson strut front, torsion beam rear suspension with front and rear stabilizer bars  Independent MacPherson strut front, double wishbone rear suspension, with front and rear stabilizer bars	Independent MacPherson strut front, torsion beam rear suspension with front and rear stabilizer bars  N/A
<b>Steering:</b>	Engine speed-sensing power-assisted rack-and-pinion	Engine speed-sensing power-assisted rack-and-pinion	Engine speed-sensing power-assisted rack-and-pinion
<b>Turning circle diameter, curb to curb (ft):</b>	32.2	32.2	32.2
<b>Brakes:</b>	Power-assisted front ventilated disc/rear drum	Power-assisted front ventilated disc/rear drum	4-wheel disc
<b>4-wheel Anti-lock Brake System (ABS):</b>	Available (standard on 4WD)	Available (standard on 4WD)	Standard
<b>Exterior Dimensions (in.):</b> Overall height Overall width Overall Length Wheelbase Ground clearance Track (front/rear)	60.6 69.9 171.3 102.4 5.9 59.6/58.9	60.6 (61.0) 69.9 171.3 102.4 5.9 59.6/58.9 (59.3/58.5)	60.6 (61.0) 69.9 171.3 102.4 5.9 59.6/58.9 (59.3/58.5)
<b>Interior Dimensions</b> Front/rear (in.): Head room  Shoulder room Hip room Leg room Seating capacity	40.6/39.8  53.2/52.6 51.7/47.8 41.8/36.3 5	40.6/39.8 (38.9/39.3) 53.2/52.6 51.7/47.8 41.8/36.3 5	40.6/39.8 (38.9/39.3) 53.2/52.6 51.7/47.8 41.8/36.3 5
<b>Weights and Capacities:</b> Curb weight (lbs.) 5-speed manual 6-speed manual 4-speed automatic 2WD/4WD EPA passenger volume (cu.ft.) Luggage capacity, rear seats up/down (cu. ft.) Fuel tank (gal.) 2WD/4WD	2,679 NA 2,756/943 96.2 21.8/53.2 13.2/11.9	2,701 NA 2,778/2,965 96.2 21.8/53.2 13.2/11.9	N/A 2,800 2,877/NA 96.2 21.8/53.2 13.2/NA
<b>Tires:</b>	P205/55R16 All-season	P205/55R16 All-season	P205/55R16 All-season
<b>Mileage Estimates (mpg city/highway):</b> 2WD manual 2WD automatic 4WD automatic	30/35 28/33 27/32	30/35 28/33 27/32	22/29 21/27 NA

## **IV. Demographics – The Target Buyer**

**Students may refer to the sections on Demographics and Toyota Advertising (Sections IV and V) for current strategy, which should not limit the exploration of new advertising strategy. The specific target for your assignment is 20-30-year-old potential buyers of the Matrix XR. Toyota is interested in new and innovative approaches to capture the youth market and encourages creativity in both strategy and execution.**

- **Pre-Launch**

A major research program was set a year before launching the vehicle. A series of clinics (where respondents viewed the interior and exterior of the Matrix and its competitors and answered questions regarding them) and focus groups were organized. At that time, there was no information concerning the “sport wagon segment,” as it simply did not exist. Most of Toyota’s thinking was then based on assumptions and knowledge from other similar segments, such as the sporty, the subcompact and the small SUV segments.

Learning from the Clinics:

- Young (18-34-year-olds) consumers responded very positively to the distinctiveness of the Matrix look. For them, Matrix was contemporary, aerodynamic, fun and poised for the future.
- The “young-at-heart” (35-45 years olds) audience saw the Matrix as a mirror of themselves: a genderless, multi-dimensional, multi-faceted persona that projects a contemporary balance of old and new.

- **Launch**

With a sales goal of 70,000, marketing focused primarily on the young target, although it was expected that the Matrix would sell to the entire age range (including “young-at-heart”). Therefore, part of the challenge was to pursue youth without denying “young-at-heart” emotional access to the vehicle. We wanted the progressive thinkers of this age range. Beyond the demographic profile, this target was best defined psychographically: educated, creative, innovative, daring and independent. They are the ones who might take some risks and stand out, but they also put a high priority on performance, quality and dependability. They are better educated than the norm, have an innate sense of creativity and openly pursue change.

Based on this, the projection for demographics was the following:



Table 5 – Demographic Projections

	Matrix Projected Buyer*	Matrix Communications Target**	Sporty Subcompact Buyer***
Median Age	37	18-34	37
% Male	40%	60%	44%
% Married	50%	30%	46%
% College****	50%	50%	53%
Median HHI	\$50K+	\$50K+	\$68K+

\*Projected Buyer: the consumer we expected to buy the Matrix based on the market, the vehicle and previous launch experience.

\*\* Communications Target: the consumer we tried to reach and to depict in our communication. Those two targets exist as a result of a gap in between marketing goals and sales reality.

\*\*\* Source: 2000 Consumer Data Study Q1-4

\*\*\*\* College degree or higher

• **Sustaining Effort**

The early buyer study was completed quickly after the launch. Here are some key findings about Matrix owners:

- Top images that Early Buyers associate with their vehicles include: “distinctive,” “fun to drive,” “versatile” and “functional” the associations with “distinctive” and “fun to drive” are particularly strong for the XRS buyers, as are the associations with “innovative,” “cool,” and “sporty.”
- Thirty-seven percent of the Early Buyers said that the Matrix has changed their image of Toyota; the most commonly mentioned image changes include: better overall (10% of total sample), more innovative/advanced (10%) and more stylish/less conservative (10%).

In addition, the two quarters of data on Matrix buyers show the following:

Table 6 – Matrix Buyer Profile

	All Matrix Models	Standard	XR	XRS	Matrix Projected Buyer*
Median Age	45	47	45	35	37
% Male	41	37	40	63	40
% Married	60	59	60	66	50
% Children Under 18 at Home	35	34	35	35	35
% College Degree or Higher	48	47	48	50	50
Median Household Income (K)	\$59	\$51	\$58	\$75	\$50+

\* CDS Data Q1-Q2 2002.

- A typical Matrix buyer is a 45-year-old female who is married with a household income of \$59K.
- Both XR and XRS grade buyer are younger, more male and have higher income.

Allison Fisher (established leader in marketing and communications research and consultancy with specialization in the automotive and auto-related fields used by Toyota for light vehicle purchase intentions) measured intention and awareness in the Sport Wagon segment:

- Sport Wagon segment now accounts for 5.2% of light vehicle purchase intentions.
- Purchase intentions have grown for each of the past four quarters; quarters 3 and 4 of 2001 and quarters 1 and 2 of 2002, proving this is a growing segment.
- Awareness of Matrix is still relatively low — 29% of Sport Wagon intenders.
- Matrix is a strong conquest model for Toyota: only 26% of its intenders are replacing a Toyota vehicle (vs. 42% for Toyota overall).

## V. Current Toyota Advertising

- **Brand Strategy**

Toyota invites consumers to “Get The Feeling.”

With record sales, industry accolades and the #1 selling car for four out of the past five years, Toyota has never been stronger. However, in keeping with the corporate philosophy of constant improvement, we are looking to the future and working toward the continued strengthening of the Toyota brand to insure future growth.

Extensive consumer research has revealed the opportunity to build an even stronger emotional bond between the Toyota brand and our consumer. The objective is to build even greater consideration and customer loyalty. We found that customers love Toyota products but want to get more emotionally involved with them and the overall brand.

The first step was the introduction of a new theme line “Get The Feeling.” Propelled by the launch of the all-new Camry, this new line was introduced last fall and has gained awareness among consumers. The next phase starts this year with a further definition of “The Feeling You Get from a Toyota.” This common feeling will be evident in all Toyota communications — focusing all efforts into a single campaign.

What is this common feeling? It is the feeling of possibility and optimism that you get from owning and driving a Toyota. Toyota’s acclaimed reputation for quality results in a vehicle that allows owners to believe they can go anywhere and do almost anything. After all, it is easier to go to new places when you are absolutely sure you are going to get there. This feeling is unique

to Toyota since it is a direct result of our founding philosophy of *Kaizen*, or constant improvement. It is this unique philosophy that delivers the high-quality and reliable vehicles our customers enjoy, providing them with a feeling when driving their Toyota that everything is going their way. This common thread should be woven through all Toyota messages.

This year at Toyota things are looking up. Get the feeling.

- **Creative Strategy**

All executions should convey a feeling of optimism, excitement and fun. By seeing immediately recognizable elements in all communications, the consumer will be able to identify Toyota advertising. More importantly, the consumer will connect with Toyota on an emotional level.

- **Creative Execution**

The creative synergy consists of the following:

- Common strategic positioning of optimism and fun
- Common graphic design (in all print layouts — examples to be provided)
- Consistent end tag treatment (ending of every broadcast spot — examples to be provided)
- Jeff Goldblum as the voiceover announcer (in every broadcast spot)

## VI. Segment Overview

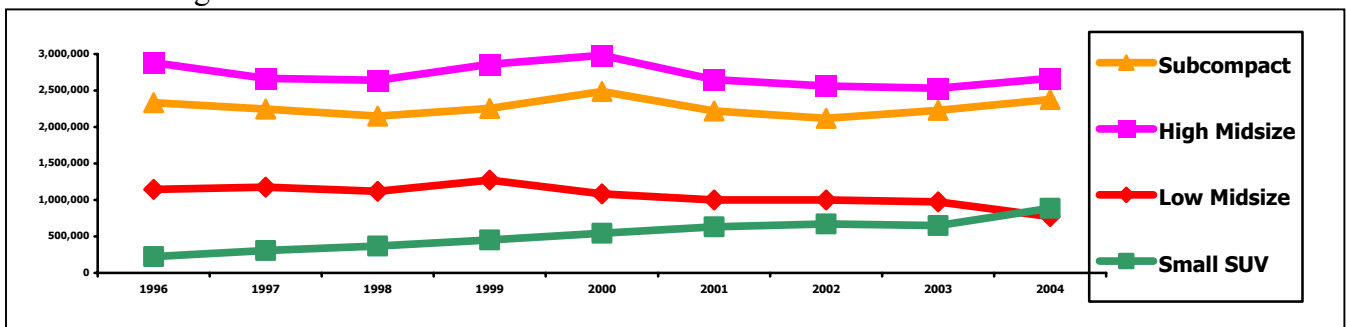
The subcompact market is a very large component of the overall new car and truck industry. New car sales in this market constitute over two million a year — making it the second largest market in the industry, after mid-size cars.

The recent growth of alternative subcompact body styles (hatchback and wagon) brought new interest and volume to the segment.

Table 7 – Segment Overview 2000-2003

Segment Volume (000)	2000 CY	2001 CY	2002 CY (Est.)	2003 CY (Est.)
<b>Subcompact</b>	2,486	2,410	2,415	2,465
<b>Sporty Subcompact</b>	526	460	410	360
<b>Small SUV</b>	545	700	730	800

Table 8 – Segment Overview 1996-2004





- Sub-segment (Cross-over vehicles) Competition

Table 9 – Sub-Segment Competition

**MARKET DYNAMICS SUMMARY**

**Majority of new entrants to the cross-over vehicles will occur in '03MY forward (The '02 Camry is for reference only-not part of the segment)**

Other	02MY	03MY	04MY
<p><b>01MY CHRYSLER PT CRUISER</b></p>  <p>Small, youth-oriented, 5 passenger MPV aimed at bridging gap between tall wagons and minivans.</p>	<p><b>TOYOTA CAMRY</b></p>  <p>Fall '01, Redefined Sdn. more sporty, sophisticated, improve space, ingress/egress</p>	<p><b>HONDA MAV SPORT UTILITY</b></p>  <p>Sister to Acura MDX, it's the larger, upscale, car-like Passport replacer.</p>	<p><b>CHEVROLET TRAVERSE</b></p>  <p>Crossover SUV/Wagon aimed at young families.</p>
<p><b>00MY FORD FOCUS WAGON</b></p>  <p>Ford's global car. Escort and Contour replacer.</p>	<p><b>HONDA CR-V</b></p>  <p>Improving interior space and more power</p>	<p><b>PONTIAC VIBE</b></p>  <p>Jan '02, Youth-Oriented PT-Cruiser fighter Mini-MPV</p>	<p><b>VW GOLF MPV</b></p>  <p>Mini-MPV w/ 4WD based on NG Golf platform.</p>
<p><b>01MY SUBARU FORESTER</b></p>  <p>"True" compact SUV.</p>	<p><b>HONDA CIVIC 3D HATCH SI</b></p>  <p>"Focus Fighter" Imported from UK as performance oriented sporty hatchback.</p>	<p><b>HONDA MODEL X</b></p>  <p>"Matrix fighter" built on civic platform w/ attributes of pickups and SUV's.</p>	<p><b>MAZDA PROTÉGÉ</b></p> <p>Transition to common Ford platform w/ Mazda 4 cyl engines.</p>
<p><b>01MY RAV4</b></p>  <p>Larger interior and exterior with better ride and performance.</p>	<p><b>FORD FOCUS 5D HATCH</b></p>  <p>Aimed at practical younger buyers that are "thumbs down" on station wagons.</p>	<p><b>DAEWOO TACUMA</b></p>  <p>4 Door Mini-MPV based on Nubira platform w/ flexible seating configurations.</p>	<p><b>NISSAN TK</b></p> <p>Altima Based CrossOver SUV aimed at bridging gap between Xterra and larger Pathfinder.</p>
	<p><b>MAZDA PROTÉGÉ 5</b></p>  <p>5 Door sport-wagon as an affordable alternative to luxury touring models.</p>	<p><b>HYUNDAI MINI MPV</b></p> <p>Elantra based 5 passenger vehicle w/ optional AWD.</p>	<p><b>VW GOLF 3 &amp; 5D HATCH</b></p> <p>Next generation with more low-slung front nose, raked windshield, and lower rear roofline.</p>

Source: www.Autosource.com

- **Implication for Matrix- SWOT Analysis**

Table 10 – SWOT Analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• All new Category buster — Cross-Over Utility Vehicle (CUV)</li> <li>• Available 4WD supporting Cross-Over Utility</li> <li>• Toyota QDR heritage</li> <li>• Next Toyota entrant youth product</li> <li>• Base of Toyota-loyal consumers</li> <li>• Exterior styling, interior versatility and comfort</li> <li>• Engine performance</li> <li>• Standard 16" and optional 17" wheels</li> </ul>	<ul style="list-style-type: none"> <li>• Price premium for body, engine and 4WD in price sensitive subcompact segment</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>• Appeal to younger buyers</li> <li>• One year of pre-launch activities</li> <li>• First to launch into upcoming "futuristic" Cross-over Utility Vehicle segment with limited time before additional vehicles enter the segment</li> <li>• Excellent price value position — positioned competitively in subcompact segment and well-below small SUV</li> </ul>	<ul style="list-style-type: none"> <li>• Potential confusion with Corolla nameplate association               <ul style="list-style-type: none"> <li>○ Threat to strong Matrix youth perception</li> <li>○ Differentiation required: avoid potential stigma "Corolla Wagon" by consumers</li> </ul> </li> <li>• Aggressive subcompact incentive support continues throughout segment</li> <li>• Launch of many all new Cross-Over Utility Vehicles: Pontiac Vibe, Mazda Protégé 5</li> </ul>

**Note: This information is for your reference. You are free to explore your own SWOT analysis and the resulting strategy.**

## VII. Industry Peculiarities

The automotive category finds itself with issues that are clearly unique in comparison with other product categories. Following is a list of peculiarities, which should be kept in mind when developing all aspects of your advertising strategy and execution.

- **Negotiable Pricing**

With the exception of GM's Saturn Division, all automobile dealers negotiate the purchase price of a vehicle with the consumer. This makes for an intensely competitive environment not only among manufacturers, but also among different divisions and models of each manufacturer. In addition, with the rise in Internet usage and the existence of publications such as *Consumer Reports*, customers have become increasingly savvy; they now have access to information such as dealer cost pricing. Few other industries have customers who go into their purchase decisions with so much information. Recently, pricing has also become more competitive due to aggressive incentives.

- **National vs. Dealer Advertising**

Most manufacturers create and support national, brand image advertising campaigns while regional dealer associations or individual dealers of the same manufacturer create their own retail-oriented campaigns' as well. Often, the retail work is not in sync with the strategy of the national brand campaign and these mixed messages can weaken image-building efforts for both the brand as a whole and for individual models. *Your assignment is specifically for a national brand strategy, not dealer or local advertising.*

- **Legalities**

Legalities are a concern for all advertisers to a certain degree. However, automotive manufacturers are forced to consider issues with which most other advertisers are not confronted. They must take special care to avoid exaggerated or false claims, especially with regard to topics like the safety of a vehicle, because they may have a wide range of implications including lawsuits. In addition, the Federal Trade Commission (FTC) has recently enforced tighter regulations regarding the advertisement of automotive leases and special financing programs after consumer groups expressed concern about misleading information.

- **Lack of Longevity for Advertising**

Due to yearly product changes, automotive advertising creative almost always must be updated on an annual basis. This is driven not only by the desire to inform the consumer about the changes but it is also a legal requirement to properly represent these changes.

## VIII. Retail Distribution

Toyota sells its vehicles through a network of about 1,200 independent franchised dealers. The vehicles are ordered by 10 Toyota regional sales offices and two private distributor sales offices with input from their respective dealers. The dealers purchase the vehicles from the manufacturer and typically hold about one month's inventory in stock.

# IX. Appendix

## A. Who Is Toyota?



- Overview**

Toyota Motor Sales (TMS), U.S.A., Inc is Toyota's sales, marketing, and distribution headquarters for the United States. TMS oversees sales and other operations for approximately 1,500 Toyota, Lexus and Toyota Industrial Equipment dealerships in 49 states.

Toyota has been selling cars in the United States since 1957 and manufacturing vehicles here since 1984. Currently, Toyota is America's fourth largest automaker. In addition to manufacturing, marketing, and distributing cars and trucks in the U.S., Toyota is involved in the forklift, aviation, and marine industries; research and development; and financial and insurance services.

By The Numbers	
Direct N.A. Employment	32,497
N.A. Supplier Employment	55,000
Direct N.A. Investment	\$13,139,100,000
Cumulative N.A. Production	9,362,251
N.A. Vehicle Sales (2001)	1,869,008
U.S. Parts/Materials Purchasing (FY ending 3/01)	\$14,850,000,000
Number of N.A. Toyota, Lexus and Toyota Industrial Equipment Dealers	1,740
Total U.S. Philanthropy (since 1991)	\$176,063,965

All data as of December 2001, except where noted.

- Manufacturing by Function**

- 1) Manufacturing Headquarters

*Toyota Motor Manufacturing North America, Inc. (TMMNA):*

[www.toyota.com/about/operations/manufacturing/manu\\_location/tmmna.html](http://www.toyota.com/about/operations/manufacturing/manu_location/tmmna.html)

- 2) Vehicle Manufacturing

*Toyota Motor Manufacturing, Kentucky, Inc. (TMMK):*

[www.toyota.com/about/operations/manufacturing/manu\\_location/tmmk.html](http://www.toyota.com/about/operations/manufacturing/manu_location/tmmk.html)

*Toyota Motor Manufacturing, Indiana, Inc. (TMMI):*

[www.toyota.com/about/operations/manufacturing/manu\\_location/tmmi.html](http://www.toyota.com/about/operations/manufacturing/manu_location/tmmi.html)



*New United Motor Manufacturing, Inc. (NUMMI):*

[www.toyota.com/about/operations/manufacturing/manu\\_location/nummi.html](http://www.toyota.com/about/operations/manufacturing/manu_location/nummi.html)

*Toyota Motor Manufacturing Canada, Inc. (TMMC):*

[www.toyota.com/about/operations/manufacturing/manu\\_location/tmmc.html](http://www.toyota.com/about/operations/manufacturing/manu_location/tmmc.html)

### 3) Parts Manufacturing

*Toyota Motor Manufacturing, West Virginia, Inc. (TMMWV):*

[www.toyota.com/about/operations/manufacturing/manu\\_location/tmmwv.html](http://www.toyota.com/about/operations/manufacturing/manu_location/tmmwv.html)

*Canadian Auto parts Toyota, Inc. (CAPTIN):*

[www.toyota.com/about/operations/manufacturing/manu\\_location/captin.html](http://www.toyota.com/about/operations/manufacturing/manu_location/captin.html)

*Bodine Aluminum, Inc. (Bodine):*

[www.toyota.com/about/operations/manufacturing/manu\\_location/bodine.html](http://www.toyota.com/about/operations/manufacturing/manu_location/bodine.html)

*TABC, Inc. (TABC):*

[www.toyota.com/about/operations/manufacturing/manu\\_location/tabc.html](http://www.toyota.com/about/operations/manufacturing/manu_location/tabc.html)

*Toyota Motor Manufacturing Alabama, Inc. (TMMAL):*

[www.toyota.com/about/operations/manufacturing/alabama/alabamaindex.html](http://www.toyota.com/about/operations/manufacturing/alabama/alabamaindex.html)

*Toyota Motor Manufacturing de Baja California (TMMBC):*

[www.toyota.com/about/operations/manufacturing/mexico/index.html](http://www.toyota.com/about/operations/manufacturing/mexico/index.html)

### 4) Forklift Manufacturing

*Toyota Industrial Equipment Manufacturing, Inc. (TIEM):*

[www.toyota.com/about/operations/manufacturing/manu\\_location/tiem.html](http://www.toyota.com/about/operations/manufacturing/manu_location/tiem.html)

- **History**

The story of Toyota Motor Sales, U.S.A., Inc. begins with a group of auto salesmen in a defunct Hollywood, Calif., dealership pitching the underpowered, overweight, hard-to-handle Toyopet Crown to American consumers. Priced \$500 higher than the best-selling Volkswagen Beetle, the Toyopet Crown was, to put it mildly, a hard sell.

Toyota Motor Sales (TMS) was officially organized on October 31, 1957, with Shotaro Kamiya named president of the new American subsidiary. The initial staff of 13, which included 11 Japanese on assignment from Japan, set up shop in a Rambler dealership in Hollywood, which later became the location of the first and only TMS-owned dealership.

It took almost a year for TMS to set itself up as an importer, with distributors acting as wholesalers and dealers as retailers. The staff also realized that the two Toyopet Crowns they brought over were not suitable for American roads and driving conditions. Compared to the American V-8s of the time, the Crowns 1.5-liter 4-cylinder was out of its league. While it hummed along well enough at 30 or 35 miles per hour, on the highway the Crown could barely



make 60. When freeway speeds were raised to 65 miles an hour, the little Tokyo Taxi simply couldn't hold its own. Still, Toyota worked to remedy the Crown's numerous ills and establish a dealer base.

By the end of 1958, the number of Toyota dealers had risen to 45. Together they sold a total of 288 vehicles — 287 Toyopet Crowns and one Land Cruiser. The following year, the dealer count more than doubled to 97, but sales continued to lag for Toyota, ranking 33rd in the import market.

### **1960s**

In December 1960, TMS/Japan decided to halt Crown exports to the U.S. until a car better suited to the American market could be designed and produced. Selling Land Cruisers allowed Toyota to remain in business in the U.S. and to keep some key personnel, but halting production of the Crown was initially viewed as a setback.

Finally, in May of 1965, Toyota introduced the Corona. It was the first imported car designed exclusively for the American motorist and best of all, it was priced to sell for less than \$2,000. By the end of 1965, Toyota Motor Sales' 384 dealers had sold some 4,000 Coronas.

Corona was eventually marketed through a network of 606 dealers and sales grew so rapidly that more Toyotas were sold in the U.S. during 1966 than all previous years combined. This accomplishment was repeated in 1967.

In 1968, the Corolla two-door sedan arrived and strengthened Toyota's reputation for high-quality affordable vehicles. Corolla, which was selling for under \$1,800, achieved sales of 130,044 units in 1969.

### **1970s**

Toyota began to experience its greatest success in the U.S. when the first of two 1970s gas shortages provided new business opportunities. Faced with long lines and soaring prices, American consumers began to discover the advantages of driving Toyota's smaller, more economical and more fuel-efficient vehicles.

The company sold its one-millionth vehicle in the U.S. in 1972 and surpassed Volkswagen to become the leading importer of passenger cars in 1975.

In addition to Toyota's growing sales, the company also brought the Celica to the U.S. market in 1971. Celica created a market segment of buyers interested in a car that combined the styling and performance of a sports car with the comfort and feel of a luxury automobile.

By 1978, Toyota earned the No. 1 position in import small truck sales, leading the Toyota nameplate to "Import Triple Crown" leadership for sales of cars, trucks and total vehicles.

### **1980s**

After selling its five millionth vehicle in 1981 and having spent over two decades in Hollywood, Toyota Motor Sales founded a new home in Torrance, Calif.

More Toyota models continued to attract the American car buyer, with the 80s bringing in some of the company's most popular vehicles. The introduction of the 1980-model Supra created a performance market for imports. And the Camry, introduced in mid-1983, won plaudits from automotive writers, the insurance industry and hundreds of thousands car buyers. The 1985 MR2 and an all-new line of Corolla sedans, coupes and wagons launched in 1988 kept the automaker going strong.

Manufacturing in the U.S. also became a priority for Toyota in the 1980s.

In 1985, Toyota began building its first cars in America as part of a joint venture with General Motors in California. Toyota Corollas, and later Tacoma trucks, rolled off assembly lines at the New United Motor Manufacturing Inc. (NUMMI) plant in Fremont, Calif.

Just a few years later, in 1988, Toyota Motor Manufacturing Kentucky was established, which now builds Camrys, Avalons and Siennas, as well as four-cylinder and V-6 engines and powertrain parts. TMMK is the Toyota organization's largest manufacturing facility outside Japan and, at 7,650,000 square feet, is one of the largest manufacturing operations anywhere in the U.S.

By 1987, Toyota sold its 10 millionth vehicle in the U.S. and established the Toyota USA Foundation, which was created to build bridges to better education. The Foundation's support is directed toward pre-collegiate education, primarily in mathematics and science.

In 1989, the company experienced more success when the first Lexus automobile was brought to the U.S. in hopes of establishing a new standard for luxury cars. The flagship LS 400 proved to be a superior automobile in every respect and was widely acclaimed by the automotive press. Lexus set high standards from the beginning, choosing only 72 dealers from more than 1,000 applications. The division also provided a comprehensive warranty, 24-hour roadside assistance, free loaner cars and a variety of other customer services. These efforts were proven successful immediately. In its first year of operation, Lexus exceeded its sales goal of 60,000 units, outselling such established names as BMW and Mercedes.

Toyota also began to venture into new territories in the late 1980s, entering the aviation industry as part of its plan to diversify. In 1989, TMS acquired AirFlite, a fixed-base operation in Long Beach, Calif., which offers aircraft service, corporate jet storage, fueling operations and aircraft sales and management. Once AirFlite was purchased, TMS expanded the facility and worked on improving its service and sales. As a result, AirFlite was voted the No. 1 Fixed-Base Operations in North America by *Aviation International News* magazine, winning the biannual award back-to-back in 1994 and 1996.

## **1990s**

From 4Runners to boats to manufacturing plants, the 1990s also proved to be a decade of growth for Toyota Motor Sales.

Introduced in the spring of 1989, the 1990 four-door 4Runner was an instant success and gave Toyota another vehicle to sell in the emerging sport utility market. By the mid-1990s, the RAV4

joined the SUV lineup, and later vehicles such as the Sienna minivan and Tundra full-size pickup truck, added to Toyota's depth in vehicles.

Besides launching these new vehicles, Toyota began to take the lead on the environmental front in the automotive industry. Americans got the first glimpse of the Prius during EVS-14, the world's largest alternative-fuel vehicle show. And in 1997, the RAV4-EV went on sale to fleet buyers in the U.S. By 1998, the vehicle became the best-selling electric vehicle in the states. The Prius, a hybrid, officially launched in 2000, representing a breakthrough in the combination of an efficient, powerful, gasoline-fueled internal combustion engine and a clean, quiet, electric motor five-passenger sedan.

In the 1990s, Toyota also ventured into the marine and forklift businesses. The first U.S.-manufactured forklift rolls off the line at Toyota Industrial Equipment in Manufacturing in 1990 and Toyota Marine Sports was established in 1997.

On the manufacturing front, Toyota Motor Manufacturing Indiana (TMMI) broke ground on May 8, 1996, and is now responsible for producing the Tundra and Sequoia.

## **2000**

The year 2000 proved to be a banner year for Toyota Motor Sales, posting record sales of 1,619,206, an increase of 9.7 % over 1999. The company also celebrated the Camry, which retained its sales crown as the best-selling passenger car in America for an impressive fourth year in a row. And to top it off, Lexus, barely a decade after its launch, emerged as the top-selling luxury brand in the U.S. market for the first time.

To view TMS' timeline in the US, click the link below:  
[www.toyota.com/about/operations/numbers/timeline.html](http://www.toyota.com/about/operations/numbers/timeline.html)

## **B. Internet Overview**

The Internet as a communication medium is a growing influence for information, advertising and commerce and should not be overlooked as part of your integrated marketing plan. It has the fastest adoption rate among all media, earning a projected 16 million new users in 2002 and 86.3 million households by 2006 (up 76% from 2000).

It is important to be aware that Internet is almost gender neutral (though slightly more male). Users tend to be better educated, possess a higher income, and skew younger with the college age bracket demonstrating a greater than 90% penetration rate.

Although online advertising remains a small percentage of overall advertising spending, it is on the rise. In 2001, online advertising accounted for \$5.7 billion in ad spending (up from \$2.1 billion in 1998) and is projected to represent 7% (\$15.4 billion) of the offline advertising market by 2006. Further, as a portion of total online ad spending, the automotive segment is projected to garner 15% (\$2 billion) of all online ad spending by 2006.

The presence of the Internet as a tool during the automotive shopping process continues to increase, with 74 million (50%) of online users utilizing the Web to research automotive information in 2001. As the most sought after information online, 80% of online automotive consumers use the Internet to research pricing information while vehicle comparison information represents their next priority. By 2006 the Internet is projected to impact 32% of automotive purchase decisions, up from 13% in 2001.

At Toyota, our interactive marketing programs have demonstrated our desire to go “beyond the banner.” For example, for the launch of the new 2003 Corolla we developed the Corolla Joy Ride game that invited users to interact with the Corolla through a fun interactive experience. Additionally, a sweepstakes component was created that was publicized through promotional events and print ads to enhance the integrated plan. The campaign raised awareness of the new Corolla, drove traffic to [toyota.com](http://toyota.com) and established a database of interested consumers.

Today our Web site, [www.toyota.com](http://www.toyota.com), receives over 3 million visits a month (up from 700,000 in 1999) and continues to be the #1 source of customer leads (defined as customers who were in the market for a new vehicle in 0-3 months, received information through our Web site, and purchased a Toyota). As our product offerings diversify and grow, the Web site will continue to serve as the single dominant source for Toyota product information available to the consumer.

*\* Projections sourced from Jupiter Media Metrix2*

## **C. Auto Sales by Segment**

Table 11 – Vehicle Sales by Segment

	VEHICLE SALES BY SEGMENT													
	July, 2002													
	CURRENT MONTH				PRIOR MONTH				CALENDAR YEAR TO DATE					
	2002	%	2001	%	DSR % CHG	SALES	%	DSR % CHG	2002	%	2001	%	DSR % CHG	
Subcompact	214,222	14.1	191,239	14.1	7.5	237,066	15.4	-6.0	1,472,408	14.8	1,516,410	15.1	-2.9	
Standard Midsize	324,874	21.3	283,618	21.0	10.0	330,881	21.5	2.1	2,101,742	21.1	2,189,753	21.8	-4.0	
Premium Midsize	57,040	3.7	60,414	4.5	-9.4	50,480	3.3	17.5	351,863	3.5	406,004	4.0	-13.3	
Sporty Subcompact	38,006	2.5	36,232	2.7	0.7	34,326	2.2	15.1	236,321	2.4	263,299	2.6	-10.2	
Near Luxury	51,711	3.4	39,783	2.9	24.8	55,034	3.6	-2.3	354,997	3.6	280,650	2.8	26.5	
Luxury Coupe	19,589	1.3	18,820	1.4	-0.1	19,764	1.3	3.1	143,491	1.4	137,744	1.4	4.2	
Mid-Luxury Sedan	13,094	0.9	17,352	1.3	-27.6	13,597	0.9	0.2	94,959	1.0	118,211	1.2	-19.7	
Prestige Luxury Sedan	8,479	0.6	9,105	0.7	-10.6	8,773	0.6	0.5	60,458	0.6	68,365	0.7	-11.6	
Traditional Domestic Luxury	21,955	1.4	22,381	1.7	-5.8	23,472	1.5	-2.7	136,150	1.4	172,954	1.7	-21.3	
Hybrid Powertrain/Electric	1,545	0	1,360	0	9.1	1,547	0	3.9	12,902	0	11,759	0	9.7	
<b>Total Passenger Car</b>	<b>750,515</b>	<b>49.3</b>	<b>680,304</b>	<b>50.3</b>	<b>5.9</b>	<b>774,940</b>	<b>50.4</b>	<b>0.7</b>	<b>4,965,291</b>	<b>49.9</b>	<b>5,165,149</b>	<b>51.3</b>	<b>-3.9</b>	
Large Pickup	184,720	12.1	178,493	13.2	-0.7	193,491	12.6	-0.7	1,322,237	13.3	1,280,272	12.7	3.3	
Large Sport Utility	79,005	5.2	59,431	4.4	27.6	64,126	4.2	28.1	437,041	4.4	447,848	4.4	-2.4	
Large Van	26,900	1.8	25,706	1.9	0.5	33,473	2.2	-16.4	204,354	2.1	222,394	2.2	-8.1	
Small Pickup	80,523	5.3	68,962	5.1	12.1	73,290	4.8	14.3	491,386	4.9	553,873	5.5	-11.3	
Mid Sport Utility	183,351	12.0	154,533	11.4	13.9	171,016	11.1	11.5	1,086,529	10.9	1,052,720	10.5	3.2	
Small Sport Utility	88,620	5.8	67,064	5.0	26.9	84,867	5.5	8.6	552,826	5.6	441,143	4.4	25.3	
Luxury Sport Utility	27,088	1.8	23,740	1.8	9.5	28,575	1.9	-1.4	186,381	1.9	179,040	1.8	4.1	
Small Passenger Van	99,453	6.5	91,021	6.7	4.9	111,096	7.2	-6.9	693,757	7.0	699,634	7.0	-0.8	
Small Cargo Van	2,490	0.2	2,180	0.2	9.7	2,427	0.2	6.7	16,523	0.2	20,721	0.2	-20.3	
Commercial Chassis	493	0.0	341	0.0	38.8	486	0.0	5.5	3,718	0.0	3,742	0.0	-0.6	
<b>Total Light Truck</b>	<b>772,643</b>	<b>50.7</b>	<b>671,471</b>	<b>49.7</b>	<b>10.5</b>	<b>762,847</b>	<b>49.6</b>	<b>5.3</b>	<b>4,994,752</b>	<b>50.1</b>	<b>4,901,387</b>	<b>48.7</b>	<b>1.9</b>	
<b>Total Industry</b>	<b>1,523,158</b>	<b>100.0</b>	<b>1,351,775</b>	<b>100.0</b>	<b>8.2</b>	<b>1,537,787</b>	<b>100.0</b>	<b>3.0</b>	<b>9,960,043</b>	<b>100.0</b>	<b>10,066,536</b>	<b>100.0</b>	<b>-1.1</b>	
<b>COROLLA</b>	<b>22,364</b>	<b>10.4</b>	<b>18,233</b>	<b>9.5</b>	<b>17.8</b>	<b>22,596</b>	<b>9.5</b>	<b>2.9</b>	<b>141,461</b>	<b>9.6</b>	<b>141,781</b>	<b>9.3</b>	<b>-0.2</b>	
Memo: Domestic	17,521	8.2	18,233	9.5	-7.7	19,764	8.3	-7.8	132,513	9.0	141,781	9.3	-6.5	
Memo: Matrix	5,993	2.8	0	0.0	#N/A	6,345	2.7	-1.8	31,579	2.1	0	0.0	#N/A	
<b>ECHO</b>	<b>2,970</b>	<b>1.4</b>	<b>3,955</b>	<b>2.0</b>	<b>-26.0</b>	<b>2,685</b>	<b>1.1</b>	<b>15.0</b>	<b>18,320</b>	<b>1.2</b>	<b>25,973</b>	<b>1.7</b>	<b>-29.5</b>	
<b>Civic</b>	<b>25,837</b>	<b>12.1</b>	<b>31,415</b>	<b>16.4</b>	<b>-21.0</b>	<b>29,176</b>	<b>12.3</b>	<b>-7.9</b>	<b>181,393</b>	<b>12.3</b>	<b>193,100</b>	<b>12.7</b>	<b>-6.1</b>	
Memo: Domestic	23,029	10.8	29,067	15.2	-23.9	26,372	11.1	-9.2	166,672	11.3	180,832	11.9	-7.8	
Sentra	9,625	4.5	8,799	4.6	5.0	9,214	3.9	8.6	64,171	4.4	60,002	4.0	6.9	
Protege	9,697	4.5	8,317	4.3	11.9	10,734	4.5	-6.0	51,378	3.5	43,141	2.8	19.1	
Metro	0	0.0	14	0.0	-100.0	0	0.0	#N/A	12	0.0	6,456	0.4	-99.8	
Escort	4,437	2.1	6,209	3.2	-31.4	6,692	2.8	-31.0	39,838	2.7	54,203	3.6	-26.5	
Focus	21,955	10.2	18,830	9.7	13.1	22,471	9.5	1.6	139,289	9.5	155,190	10.2	-10.2	
Saturn Coupe	3,046	1.4	1,911	1.0	53.0	2,861	1.2	10.7	14,917	1.0	20,458	1.3	-27.1	
Saturn Sedan	10,848	5.1	6,514	3.4	59.9	13,702	5.8	-17.7	69,492	4.7	81,526	5.4	-14.8	
Prizm	944	0.4	2,984	1.6	-69.6	1,761	0.7	-44.2	13,531	0.9	34,002	2.2	-60.2	
Cavalier	16,404	7.7	12,331	6.4	27.7	24,713	10.4	-31.0	156,015	10.6	143,792	9.5	8.5	
Sunbird	4,799	2.2	4,422	2.3	4.2	6,844	2.9	-27.1	45,846	3.1	48,328	3.2	-5.1	
Vibe	3,553	1.7	0	0.0	#N/A	4,027	1.7	-8.2	16,028	1.1	0	0.0	#N/A	
Accent	6,613	3.1	6,817	3.6	-6.9	6,602	2.8	4.2	45,255	3.1	49,331	3.3	-8.3	
Elantra	12,570	5.9	11,058	5.8	9.1	12,568	5.3	4.0	72,256	4.9	63,268	4.2	14.2	
Aerio	1,829	0.9	0	0.0	#N/A	2,162	0.9	-12.0	6,349	0.4	0	0.0	#N/A	
Swift	3	0.0	182	0.1	-98.4	9	0.0	-65.3	177	0.0	1,911	0.1	-90.7	
Esteem	154	0.1	971	0.5	-84.8	386	0.2	-58.5	3,547	0.2	8,231	0.5	-56.9	
Lancer	7,997	3.7	83	0.0	9149.5	4,323	1.8	92.4	42,859	2.9	83	0.0	51537.3	
Mirage	672	0.3	1,833	1.0	-64.8	780	0.3	-10.4	5,990	0.4	25,260	1.7	-76.3	
Golf	4,987	2.3	4,366	2.3	9.7	4,307	1.8	20.4	26,003	1.8	25,857	1.7	0.6	
Beetle	4,202	2.0	5,247	2.7	-23.1	4,488	1.9	-2.6	29,779	2.0	40,119	2.6	-25.8	
Mini Cooper	2,866	1.3	0	0.0	#N/A	2,597	1.1	14.8	9,605	0.7	0	0.0	#N/A	
Impreza	3,025	1.4	3,210	1.7	-9.5	3,144	1.3	0.1	22,921	1.6	18,358	1.2	24.9	
Neon	9,149	4.3	8,588	4.5	2.3	12,115	5.1	-21.5	77,684	5.3	95,241	6.3	-18.4	
PT Cruiser	11,735	5.5	10,697	5.6	5.3	13,134	5.5	-7.1	87,395	5.9	82,992	5.5	5.3	
Rio	5,421	2.5	4,323	2.3	20.4	4,506	1.9	25.1	28,227	1.9	31,182	2.1	-9.5	
Sephia	0	0.0	4,772	2.5	-100.0	0	0.0	#N/A	0	0.0	32,981	2.2	-100.0	
Spectra	6,520	3.0	2,882	1.5	117.2	8,471	3.6	-20.0	49,053	3.3	12,958	0.9	278.6	
Lanos	0	0.0	1,512	0.8	-100.0	0	0.0	#N/A	6,612	0.4	10,106	0.7	-34.6	
Nubira	0	0.0	1,064	0.6	-100.0	0	0.0	#N/A	7,005	0.5	10,580	0.7	-33.8	