

**THE INFLUENCE OF MARKETING STRATEGIES ON POPULARITY
OF TOYOTA AND NISSAN BRANDS IN KENYA**

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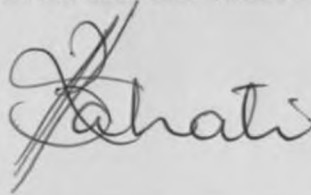
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DECLARATION

This research project is my original work and has not been submitted for a degree in any other university.



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This research project has been submitted for examination with the approval of the University Supervisor.



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DEDICATION

This study is dedicated to the Almighty God, who at his own timing enabled me to do this research in good health. It is also dedicated to my Family, husband Zack and our two lovely girls Mbodze and Kadzo for their support, time and encouragement, especially Mbodze who wondered why I had to do my studies at an old age. She vowed to finish hers before she got children.

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ABSTRACT

The environment under which organizations operate is often rapidly changing and is being shaped by several forces such as globalization, deregulation, technology advancement and privatization. As a result of these forces the customer is now empowered with more information and has a wide range of choices. Customers are also growing more sophisticated, price sensitive, are short of time, want more convenience and have high service expectations. To survive in a dynamic environment companies have to adapt their strategies to focus on their customers and deal with emerging environmental challenges.

In Kenya, the motor vehicle industry is very competitive more especially when it comes to selling small saloon cars of the Toyota and Nissan brands. The intensive competition in the industry has seen motor dealers in Kenya spend millions of shillings on marketing in order to get customers' attention, which hopefully lead to market penetration and dominance. There is stiff competition for the leading motor dealers in Kenya as indicated in the Kenya Motor Industry sales statistics.

TOYOTA and NISSAN brands are presumed to be similar in terms of product features and technology. Both are manufactured in Japan. The companies appear to sell similar models. They are sold and serviced by well established companies which target similar market segments. These two brands appear to be quite popular in Kenya and are used in different categories of motor vehicles be it brand new from the showroom or directly imported as reconditioned from Japan commonly referred to as 'mtumba'.

It was therefore found professionally important to empirically investigate what makes these two brands popular among the Kenyan customers and what brand positions the companies have created to make them appeal to customers. The research studied the Toyota and Nissan brands. The specific objectives of the study were to determine which company's brands are more popular to corporate buyers in Kenya and to assess the extent to which the applied marketing strategies influence the brand's popularity.

The study used a descriptive survey research design. The target population for the study was composed of corporate customers of Toyota and DT Dobie in Kenya and the staff of these two companies. The target respondents from the corporate customers were the Chief Executive Officers, Marketing & Sales, Transport, Finance Managers and drivers. These are the key influencers of and / or decision makers on the design and make of motor vehicle brand to be bought.

The study mainly relied on primary data collected using partially structured questionnaires. The questionnaires targeted respondents from the sampled corporate customers and staff from the two companies (DT Dobie and Toyota East Africa). Data analysis involved computation of measures of central tendency (mean score, frequencies and percentages) and dispersion (range, variance and standard deviation). Where appropriate bar graphs were used to more clearly present the study results.

The results of the study showed that the two marketing companies use various marketing strategies to increase customer awareness of their brands and market shares. The strategies that are mainly used by the two motor vehicle marketing companies are distribution, promotion and pricing strategies. Toyota East Africa uses various tactics under these strategies more often than DT Dobie for its Nissan brand. This accounts for the high popularity of the Toyota brand than the Nissan brand in the Kenyan market.

On the issue of customer preference and use of the two brands in the Kenyan market 37% of the respondents mentioned that they use Toyota brand only, and 27% indicated they only use Nissan brand. Another 37% of the respondents mentioned that they have both the Toyota and the Nissan brands.

Further research is recommended to include other geographical regions as well as retail customers.

CHAPTER ONE

INTRODUCTION

1.1. Background

Ansoff (1987) and Kotler (1985), note that the environment under which organizations operate is often rapidly changing and is being shaped by several forces such as globalization, deregulation, technology advancement and privatization. As a result of these forces the customer is now empowered with more information and has a wide range of choices. Customers are also growing more sophisticated, price sensitive, are short of time, want more convenience and have high service expectations (Kotler, 1985).

It is imperative therefore for organizations to continually adapt their activities in order to succeed. To survive in a dynamic environment their strategies need to focus on their customers and deal with emerging environmental challenges. This is necessary because the organizations are largely dependent on the environment. When firms are faced with unfamiliar changes they should revise their strategies to match the turbulence level (Ansoff and Mc Donnel, 1990). Failure to effectively adapt the organization to its environment leads to a strategic problem. The organization's external environment consists of all the conditions and forces that affect its strategic options and defines its competitive situation (Pearce and Robinson, 1997).

The pressures of the environment are now so great that the opportunity to survive with a broadly reactive strategy no longer exists. Recognition of the significance of these pressures has been reflected in the rapid growth in recent years of the number of strategic alliances between firms in various parts of the world in a desperate attempt to gain economies of scale in production, distribution and marketing that are needed if a viable competitive profile is to be maintained. In a nutshell the emerging environmental challenges have seen a lot of marketing activity extended beyond domestic frontiers in a process called internationalization (Gilligan, 1989).

In Kenya, drastic changes have occurred in many sectors, leading to opening of the domestic market to competition. Companies are now facing intense competition from domestic and foreign brands which is resulting in rising promotion costs and shrinking profit margins. For instance, the liberalization of the motor vehicle industry has led to very many players bringing

in used vehicles, from various countries including Singapore, Malaysia, Japan, and The United Kingdom. In addition the global recession has contributed to the flooding of many used cars to Kenyan market as they are deemed to be cheaper than the new showroom vehicles. This has therefore also led to adoption of different marketing strategies in order to stay afloat in a competitive and shrinking market.

1.2 The concept of Brand Strategy

A strategy may be defined as the broad program of goals and activities to help a company achieve success. Strategy is the match between organization's resources and skills and environmental opportunities and risks it faces and the purposes it wishes to accomplish (Schendel & Hofer, 1979). Johnson and Scholes (1998) on the other hand defined strategy as the scope and direction of an organization over the long term, which achieves an advantage for the organization through its configuration of resources within a changing environment to meet the needs of markets and to fulfil stakeholder expectations.

A brand is the sum of all characteristics, tangible and intangible, that make an offer unique and therefore desirable to the targeted consumer over the competition. It is considered to be the energy of a company and this, in effect, dictates its personality. It not only tells us what a company is and what it does, but also distinguishes one organization from another. By its brand, a company communicates a clear message to all its stakeholders and it is therefore of utmost importance that this message targets its audience in a manner that exceeds expectations (Interbrand 2006). The American Marketing Association (AMA) defines a brand as a "name, term, sign, symbol or design, or a combination of them intended to identify the goods and services of one seller or group of sellers and to differentiate them from those of other sellers.

Therefore it makes sense to understand that branding is not about getting your target market to choose you over the competition, but it is about getting your prospects to see you as the only one that provides a solution to their problem. This study will evaluate the different strategies that Toyota East Africa and DT Dobie have undertaken to bring out their brands Toyota and Nissan respectively in Kenya.

Brand positioning is the process of ensuring that a brand can fight through the noise to catch customers' attention... it allows the brand to occupy a distinct, meaningful and valued place in target customers' minds. Brand positioning is a strategic decision of where a brand is to compete (Interbrand, 2006). It gives a company a clear picture of the consumer needs that it intends to satisfy. It also helps the company to come up with a product or service designed and priced in line with promotion claims and suitable for the points of delivery.

The elements of the marketing mix have to be combined in such a way that the product/service position is made clear to the buyer (Wells, 1996). The objectives that a good brand will achieve include delivering the message clearly, confirming the company's credibility, connecting the target prospects emotionally, motivating the buyer and enhancing user loyalty. To succeed in branding companies must understand the needs and wants of the customers and prospects. This is done by integrating the brand strategies through the company at every point of public contact. It is for this purpose that the proposed study will investigate the different brand strategies (Toyota and Nissan) have taken in Kenya and the extent to which the strategies have assisted to build the respective brand.

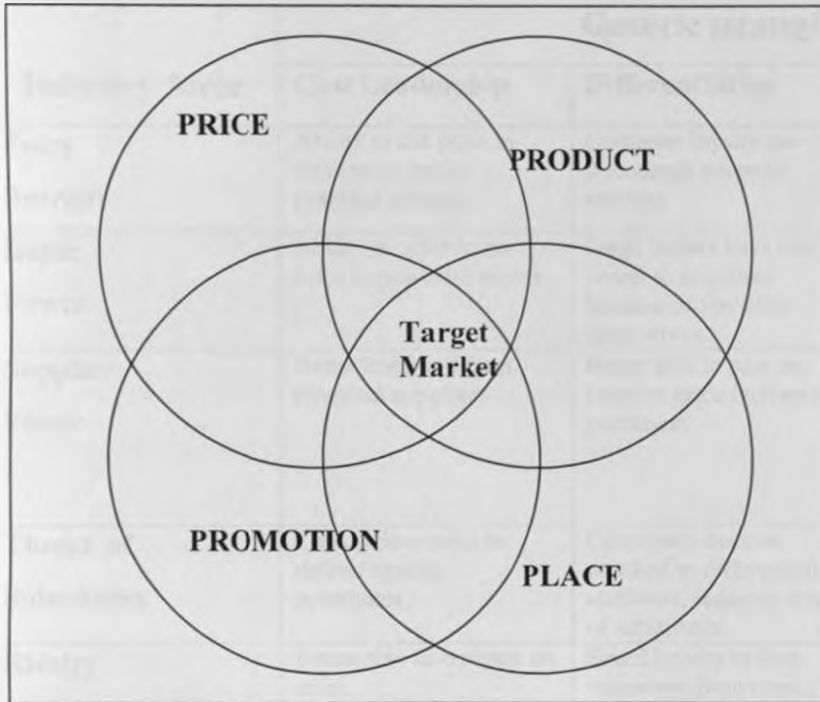
1.3 The concept of marketing strategies

Marketing strategy is a process that can allow an organization to concentrate its limited resources on the greatest opportunities to increase sales and achieve a sustainable competitive advantage. It should be centred on the promise that customer satisfaction is the main goal of the organization (Michael Baker 2008).

A marketing strategy is a written plan which combines product development, promotion, distribution, and pricing approach, identifies the firm's marketing goals, and explains how the goals will be achieved within a stated timeframe. The strategy determines the choice of target market segment, positioning, marketing mix, and allocation of resources. It is most effective when it is an integral component of a firm's strategy, defining how the organization will successfully engage customers, prospects, and competitors in the market arena, corporate strategies, corporate missions, and corporate goals. As the customer constitutes the source of a company's revenue, marketing strategy is closely linked with sales. A key component of marketing strategy is often to keep marketing in line with a company's overarching mission

statement (Michael Baker 2008). Marketing decisions generally fall into four controllable categories of Product, Price, Place (distribution), and Promotion as depicted in Figure 1.

Figure 1. Marketing Mix Model.



Source: Author, 2009

In marketing, a strategy consists of a well thought out series of tactics to make a marketing plan more effective. Marketing strategies serve as the fundamental underpinning of marketing plans designed to fill market needs and realize marketing objectives. Plans and objectives are generally tested for measurable results. This study will empirically investigate on the two companies' marketing strategies that are assumed to have contributed to the popularity of their brands.

Porter (1984) has argued that a firm's strengths ultimately fall into one of the following strategies: cost advantage and differentiation. By applying these strengths in either a broad or narrow scope, three generic strategies result: *cost leadership*, *differentiation*, and *focus*. These strategies are applied at the business unit level. These generic strategies each have attributes

that can serve to defend against competitive forces. Table 2 compares characteristics of generic strategies in the context of the Porter's five forces.

Table 1: Generic Strategies and Industry Forces

Industry force	Generic strategies		
	Cost Leadership	Differentiation	Focus
Entry Barriers	Ability to cut price in retaliation deters potential entrants	Customer loyalty can discourage potential entrants	Focusing develops core competencies that can act as an entry barrier.
Buyer Power	Ability to offer lower price to powerful buyers.	Large buyers have less power to negotiate because of few close alternatives.	Large buyers have less power to negotiate because of few alternatives.
Supplier Power	Better insulated from powerful suppliers	Better able to pass on supplier price increases to customers	Suppliers have power because of low volumes, but a differentiation-focused firm is better able to pass on supplier price increases.
Threat of Substitutes	Can use low price to defend against substitutes.	Customer's become attached to differentiating attributes, reducing threat of substitutes	Specialized products & core competency protect against substitutes.
Rivalry	Better able to compete on price.	Brand loyalty to keep customers from rivals	Rivals cannot meet differentiation-focused customer needs.

Source: Porter.M E (1980) *Competitive Strategy*, The Free Press

Managing in a changing environment is what strategic marketing is all about. Responding to and anticipating change is the essence of evaluation and control. Executives develop innovative marketing strategies and monitor their effectiveness, altering strategies as a result of changing environmental conditions.

Understanding the above strategies will assist in evaluating the two brands (Toyota and Nissan), comparing the two companies and evaluating how the strategies used have contributed to the position of their brand in the Kenyan market.

1.4 The Motor Vehicle Industry in Kenya

According to the Kenya Motor Industry (KMI) website (www.kmi.co.ke) the motor industry in Kenya is characterized by a number of players that are involved in the direct manufacture of

motor vehicles, supply of their accessories and financing of the industry in general. The sale of the various brands include small saloon cars, medium sized utility vehicles (SUVs) which are mainly 4x4s, Commercial vehicles such as the double cabs and single cab pick ups, buses, trucks and prime movers. (Appendix 6)

One of the major attributes of cars considered by car buyers is their dependability. That is why car manufacturers always look for ways of improving their vehicle's reliability. A typical car usually shows its weaknesses and become prone to breakdowns when it has reached a certain number of years in use or the distance in kilometres covered by the motor vehicle. But car manufacturers count on reliability of their vehicles during the early years of ownership. A reputation of a brand is at stake during this stage. If a vehicle exhibits poor quality during the early stages of ownership, it will of course give the vehicle manufacturer a bad reputation (www.articlesbase.com).

As shown in Appendix 6 Toyota East Africa and D.T Dobie and Company (Kenya) Ltd are amongst the largest motor vehicle dealers in Kenya. A brief discussion on the history of these two companies follows.

The Toyota Motor Corporation (TMC) is a multinational corporation headquartered in Japan, and is currently the world's largest automaker. Toyota Corporation employs approximately 316,000 people worldwide.

Toyota is the No. 1 car maker in the world. In 2008, it sold 8.97 million vehicles compared with General Motors' (GM'S) 8.35 million, thereby replacing G.M. in the top spot. Toyota's sales, though, in the difficult world economy, were down 4 percent from 2007. In January 2009, Toyota named Akio Toyoda, the grandson of the Company's founder, as its president, returning to its roots as it faces the roughest downturn in more than 70 years. The appointment of Mr. Toyoda, 52, was widely expected as part of a management reshuffling at the company because of its losses.

Toyota's vision states that its goal is to become "more inquiring, more advanced, and more dedicated" under the slogan of "Open the frontiers of tomorrow through the energy of people

and technology." While Toyota's worldwide family is aiming to become "the most admired in town," the aim of Toyota's Vision is to work hard towards making every dealer, plant, regional headquarters, design centre, and supplier around the world, including TMC, the "best company in town." In other words, a "company that is respected and admired by the communities we operate in and creates and shares a desirable future for all" (New York times Monday, July 27, 2009).

In Kenya **Toyota East Africa Ltd**, with its head office in Nairobi, is situated along Uhuru Highway /Lusaka road, Nairobi, and handles the Toyota dealership. The Company markets Toyota vehicles and spare parts and automobile accessories. Toyota East Africa (TEAL) has been operating in the Kenyan market for the past fourteen years (www.kmi.co.ke). In all these years, Toyota East Africa has gained unrivalled experience and developed cutting edge expertise that sets the company apart from competitors. TEAL is a sole distributor of Toyota and Yamaha in Kenya. It is owned 100% by TTC, the trading company of Toyota Motor Group which has a wide portfolio of business interests.

Information posted on TEAL website (www.toyotaea.com) indicates that the Company is renowned for reliability and high quality customer service. This position has enabled the company to remain ahead of the pack as attested by last year's market statistics (www.toyotaea.com). As shown in the KMI statistics, the Company increased its market share in the year 2008 by a 2% margin over the previous year. At the end of December 2008 the Company attained a 30.4% market share with a closure of the year to date with total market share at 24% which resulted in maintaining the number one position for the seventh year running in Kenya.

The Nissan Motor Company (NMC), Ltd, or Nissan, is a Japanese multinational automaker headquartered in Japan. It was formerly a core member of the Nissan Group, but has become more independent after it's restructuring under Carlos Ghosn (CEO).

It formerly marketed vehicles under the "Datsun" brand name and is one of the largest car manufacturers in the world. The company's main offices are located in the Ginza area of Chūō, Tokyo. In 1999, Nissan entered an alliance with Renault S.A. of France, which owned 44.4%

of Nissan as of 2008. The first product of the Nissan-Renault alliance was the Nissan Primera, launched in 2001 and shared chassis with Renault Laguna that had been launched in 2000. Nissan is among the top three Asian (also known as the *Japanese Big 3 Automakers*) rivals of the "Big Three" in the U.S. Currently it is the third largest Japanese car manufacturer.

In the wake of the 1973 oil crisis, consumers worldwide (especially in the lucrative U.S. market) began turning to high-quality small economy cars. Nissan made a conscious decision for their growing economy car lines to have a "sporting" flavour, and set up new factories in Mexico, Australia, Taiwan and South Africa.

The D.T. Dobie & Co. (Kenya) Ltd was founded by colonel David Dobie in 1949 and has its head office in industrial area along Lusaka road. The Company's core business is vehicle distribution, sales, parts and after sales service. Its principal brands are the Nissan, Daimler-Chrysler (Mercedes, Jeep, and Chrysler) and Renault. The Company started out with the Mercedes-Benz franchise for East Africa, for saloon cars and heavy commercial vehicles. In 1964 the organization was awarded the sole franchise distributorship of Nissan passenger and light commercial vehicles in Kenya. In 2001, through the franchise holding in Daimler Chrysler, the Company was awarded the Jeep franchise. In 2007, it acquired the Renault brand for saloons and light commercial vehicles.

In 2000 D.T. Dobie was acquired by CFAO, a French company which is a wholly owned subsidiary of the Pinault Printemps-Redoute (PPR) group. The PPR group is a world renowned organization in specialized distributorship with a market value currently estimated to be in excess of US\$ 25 billion. CFAO is the leader in vehicle distribution in Africa and the French overseas departments and territories. It operates in 30 African markets and D.T Dobie benefits from the international management and technical experience in different markets and strong financial base.

This research project has empirically investigated the marketing strategies followed by these two subsidiaries of the world's automobile giants with a view to unearthing what makes them highly competitive.

1.5 Statement of the problem

By its brand, a company communicates a message to all its stakeholders and it is therefore of utmost importance that this message targets its audience in a manner that meets their expectations. Brand positioning gives a company a clear picture of the consumer needs and wants that it intends to satisfy. It helps the company to come up with a product or service designed and priced in line with promotional claims and suitable for the points of delivery. The elements of the marketing mix have to be combined in such a way that the product position is made clear to the buyer (Wells, 1996).

The motor vehicle industry in Kenya is very competitive more especially when it comes to selling small saloon cars of the Toyota and Nissan brands. Competitiveness is evidenced by various brand positions (though appearing) similar that have been taken by the different manufacturers. The intensive competition in the industry has seen motor dealers in Kenya spend millions of shillings on marketing in order to get customers' attention, which hopefully lead to market penetration and dominance. There is stiff competition for the leading motor dealers in Kenya as indicated in the Kenya Motor Industry sales statistics. (Appendix 6)

In Kenya, TOYOTA and NISSAN are presumed to be similar in terms of product features and technology. Both are manufactured in Japan. The companies appear to sell similar models: 4WDs (Toyota Prado and Nissan patrol); Saloon cars (Toyota corolla and the Nissan Tiida); Pick ups (Toyota Hilux and the Nissan Hardbody); Double cab (Toyota Hilux double cab and the Nissan Navara double cab); Matatu vans (Nissan Urvan and the Toyota Hiace) and other models. They are sold and serviced by well established companies which target similar market segments. These two brands appear to be quite popular in Kenya and are used in different categories of motor vehicles be it brand new from the showroom or directly imported as reconditioned from Japan commonly referred to as 'mtumba'.

Most of the studies I went through had not researched on the area of the popularity of Nissan and Toyota brands in Kenya. These include some studies that have been done in relation to Branding and marketing strategies, which include; Elias P. Mbau (2000), An empirical investigation of creation and application of brand equity in Kenya, Unpublished MBA Research Project paper University of Nairobi. Others are studies done by Awinyo S.C.A.

(2008), Market Positioning Strategies adopted by Courier Service Companies in Kenya, Unpublished MBA Research Project paper University Of Nairobi; Suge, H.S. (1999), Liberisation and Its Impact on Kenya's Motor Industry, Unpublished MBA Research Project paper. University Of Nairobi; and Tahreen, K. L (1998), The Effect of Second- Hand Imports on Kenyan Passenger Vehicle Industry, Unpublished MBA Research Project paper. University Of Nairobi. In addition these brands have similar characteristics in design and feature. hence prompted me to investigate further. I found it of importance to empirically investigate what makes these two brands popular among the Kenyan customers and what brand positions the companies have created to make them appeal to customers. The proposed research will study the Toyota and Nissan brands. The research questions for the proposed study were in twofold:

- a) Is Toyota brand actually more popular than Nissan brands in Kenya?
- b) To what extent is the brand popularity explained (accounted for) by marketing strategies applied by the two companies?

The overall purpose of the study was to provide research informed answers to the two questions.

1.6 Objectives of the study

The objectives of the study were:

- 1) to determine which company's brands are more popular to corporate buyers in Kenya.
- 2) to assess the extent to which the applied marketing strategies influence the brand's popularity.

1.7 Importance of the study

The results of this study will be beneficial to different groups like the academics, manufacturers/assemblers, marketing and advertising agencies, motor vehicle dealers, the Marketing Society of Kenya and the Kenya Motor Industry association.

This research will add to the available knowledge and therefore academicians will use the findings as a basis for further research.

The study was expected to bring to light the key factors (attributes) that account for the differences in the two brands and hence assist the two companies to formulate more effective marketing strategies.

The study was expected to provide additional research - based information that can be used to better craft relevant marketing communications strategies to marketing and advertising agencies.

Other players in the motor vehicle industry are expected to benefit from the research findings since they operate in the same market. In addition the results of the study will provide more marketing insights to industry – related associations such as the Kenya Motor Industry (KMI) and the Marketing Society of Kenya (MSK).

The current chapter has presented the background to the study; discussed the concept of brand strategy and that of the marketing strategies; reviewed the status of the motor vehicle industry in Kenya as well as the rivalry between the Toyota and Nissan brands; and concluded with the statement of the research problem and study objectives. The next chapter reviews the relevant theoretical and empirical literature.

CHAPTER TWO

LITERATURE REVIEW

2.1 Introduction

This chapter explored the areas of the brand preference, brand equity and the various marketing models that define the market strategies used by most organizations, the specific marketing strategies used based on the marketing mix elements and the measurement of customer behaviour resulting from the marketing strategies deployed.

2.2 Brand preference

Brand preference is a measure of brand loyalty in which a consumer will choose a particular brand in presence of competing brands, but will accept substitutes if that brand is not available.

Within any product category, most consumers have a group of brands that comprise their preference set. These are the four or five market brands the consumer will consider when making a purchase. When building preference, the goal is to first get on the consumer's preference sets, and then to move up the set's hierarchy to become the brand consumers prefer the most – their market brand. Gaining and maintaining consumer preference is a battle that is never really won.

The competition among brands is fierce. In every product category, consumers have more choices, more information and higher expectations than ever before. Jockeying for position in a consumer's preference set requires an aggressive strategy and constant vigilance. The process begins by knowing who you are and with whom you want to establish a relationship. (www.businessdictionary.com)

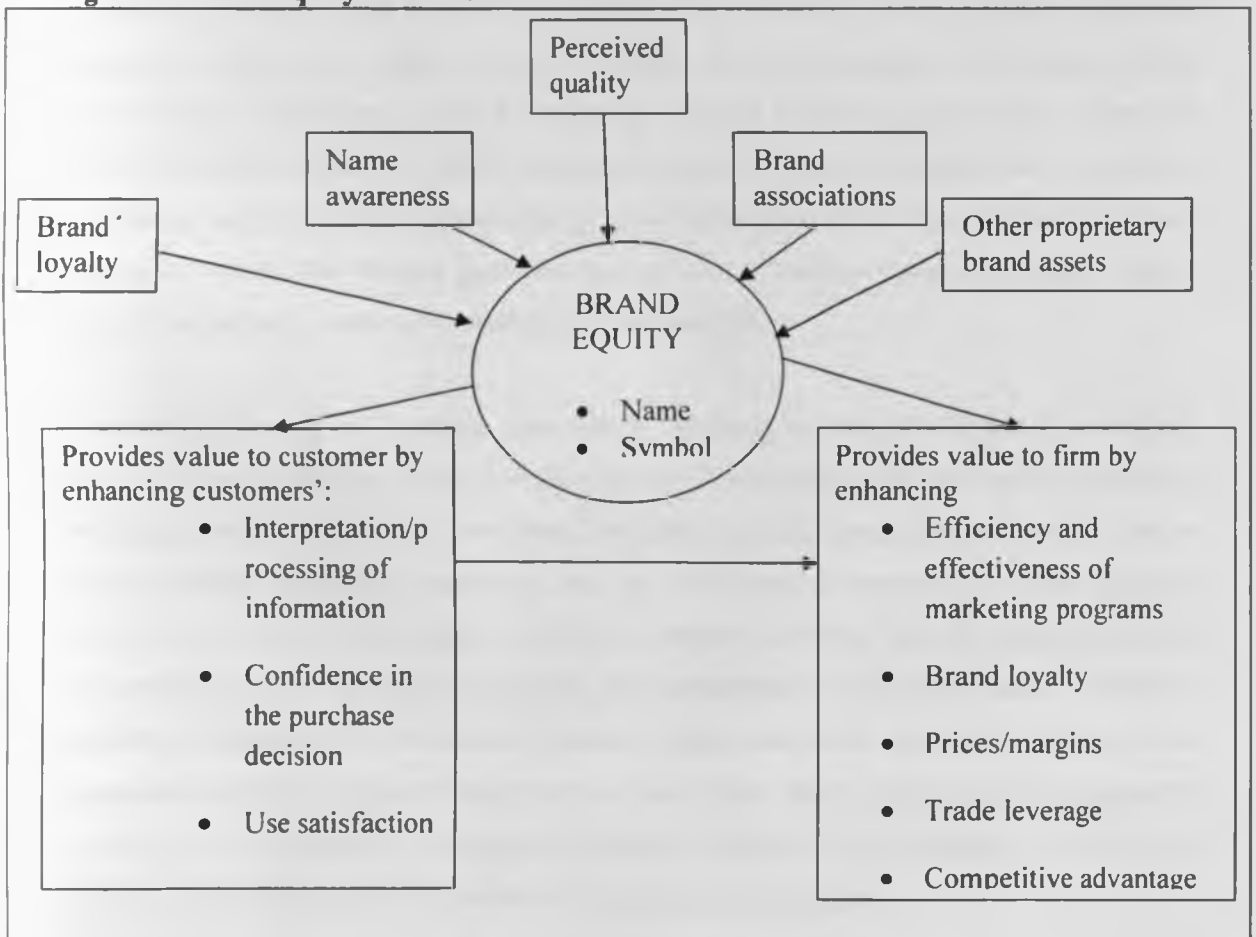
Key to communicating this brand position is establishing a frame of reference. In an article published by the *Harvard Business Review* entitled, "Three Questions You Need To Ask Your Brand," Keller (2002) writes, "...a frame of reference signals to consumers the goal they can expect to achieve by using a brand." Consumers can quickly figure out what the product is and how they should use it.

Kenya Motor Industry (KMI) information indicates that in Kenya Toyota is grabbing a bigger market share than Nissan and the brand preference seems to be high. This proposal intends to investigate on to the different strategies undertaken by the two companies which may have let to the position of the brands in Kenya.

2.3. Brand equity

According to Aaker(1991) brands have high awareness, many loyal consumers, a high reputation for perceived quality, proprietary brand assets such as access to scarce distribution channels or to patents; or the kind of brand associations(such as personality associations). The equity of the brand is captured in the name and symbol of the brand (Batra, Mcycrs and Aaker, 2005) (Figure 2)

Figure 2: Brand Equity Associations



Source: R. Batra, J Myers, and D A. Aaker (2005) - An overview of Brand Equity

The Figure 2 depicts different associations to a brand name and a brand symbol which in turn brings out benefits to the customer and the firm. The summary of the relationships will assist the study by bringing out important variables which are expected to influence preference and popularity of Toyota and Nissan brands in Kenya.

2.4 Marketing Strategy and its importance

Kotler and Keller (2006) have defined marketing strategy as a process that can allow an organization to concentrate its limited resources on the greatest opportunities to increase sales and achieve a sustainable competitive advantage. A marketing strategy is centred on increasing customer satisfaction as the main goal.

A marketing strategy often integrates an organization's marketing goals, policies, and action sequences (tactics) into a cohesive whole. Similarly, the various strands of the strategy, which might include advertising, channel marketing, internet marketing, promotion and public relations, can be orchestrated. Many companies cascade a strategy throughout an organization by creating tactics that then become strategy goals for the next level or group. Each one group is expected to take that strategy goal and develop a set of tactics to achieve that goal. This is why it is important to make each strategy goal measurable.

A marketing strategy is a written plan which combines product development, promotion, distribution, and pricing approach, identifies the firm's marketing goals, and explains how they will be achieved within a stated timeframe. Marketing strategy determines the choice of target market segment, positioning, marketing mix, and allocation of resources. It is most effective when it is an integral component of the firm's strategy, defining how the organization will successfully engage customers, prospects, and competitors in the market arena. Effective marketing strategies take into account mission, values and other corporate strategies of an organization with the customer being the main focus given that it is the source of a company's revenue. A key component of marketing strategy is often to keep marketing in line with a company's overarching mission statement (www.learnmarketing.net).

A Marketing strategy provides consistency throughout the different elements of an organization's marketing mix. This study evaluated the different marketing strategies used by these two firms and see its effect on the preference of there brands.

2.5 Rationale for crafting Marketing Strategies

Effectiveness of marketing strategies is measured by the consumer behaviour exhibited by the both individual consumers who buy goods and services for their own use and organizational buyers who purchase business products. Summers (1970), notes that it is the process through which the ultimate buyer makes purchase decisions. According to Laermer and Simmons (2007), this buying behaviour is a function of the interactions of personal influences and pressures exerted by outside environmental forces while consuming behaviour is a function of the interactions of interpersonal influences such as culture, friends, classmates, co-workers, and relatives and personal factors such as attitudes, learning, and perception. Marketing strategies used by organizations to drive sales can be categorized as external influences.

Three consumer based behaviours exhibited by customer towards a company's products include share of the mind and the share of the heart and share of the sales (Kotler 1984). Share of the mind is the percentage of sample which mentions your brand name first. It has a lot to do with media and visibility and it basically means how much more audiences think about your product versus the competition. Share of the heart is the best term for a trusted brand and is mostly expressed by the quality of the product and the creativity of the advertising message which echo with the target buyer. Share of the heart is measured in tendency to acquire/buy whereas Share of the mind is mainly awareness/recall. Share of the sales is where an organization uses marketing strategies to capture the biggest share of the target market. (imaginedesigndc.wordpress.com)

Perner (2007) adds that in trying to increase the sales market share, many companies especially those in the consumer package goods (CPG) market adopt the theory of running their business centered on consumer, shopper and retailer needs. Their marketing departments spend quality time looking for "Growth Opportunities" in their categories by identifying relevant insights (both mindsets and behaviors) on their target consumers, shoppers and retail

partners. These growth opportunities emerge from changes in market trends, segment dynamics changing and also internal brand or operational business challenges. The marketing team can then prioritize these growth opportunities and begin to develop strategies to exploit the opportunities that could include new or adapted products, services as well as changes to the 7Ps. Market research is often needed to ensure that we produce what customers really want and not what we think they want.

The current study investigated the role of the above variables (factors) in determining the popularity of Toyota and Nissan brands in Kenya.

2.6 Marketing Strategy Models

Marketing practitioners often employ strategic models and tools to analyze marketing decisions. When beginning a strategic analysis, various models can be employed to get a broad understanding of the strategic environment. The Ansoff Matrix is often used to convey an organization's strategic positioning of its marketing mix. Ansoff (1987) defines four main marketing strategies based on product and market dimensions. These have provided a basis upon which organizations develop their strategies. Out of these the 4Ps of marketing are then utilized to form a marketing plan to pursue a defined strategy (Table 2).

Table 2 – Ansoff Product /Market Growth model

Markets	Product		
		<i>Current</i>	<i>New</i>
	<i>Current</i>	Market penetration	Product development
	<i>New</i>	Market development	Diversification

Source: Igor Ansoff (1987) Corporate Strategy, McGraw-Hill Inc.

A brief description of each product/market strategy is presented next.

2.6.1 Market penetration

Market penetration is growth strategy where the business focuses on intensive selling existing of products into existing markets. A market penetration strategy is very much about “business as usual”. The business is focusing on markets and products it is familiar with. It is likely to have good information on competitors and on customer needs and wants. With this strategy then it is unlikely that this strategy will require much investment in new market research. Some of the objectives for a company pursuing this strategy are geared towards maintaining or increasing the market share of the current products. Kotler (2003) explains that this is achieved by a combination of competitive pricing strategies, advertising, sales promotion and perhaps more resources dedicated to personal selling by the company. The other objectives would be to secure dominance of growth markets like the growing markets: restructuring a mature market by driving out competitors hence requiring a much more aggressive promotional campaign, supported by a pricing strategy designed to make the market unattractive for competitors and increasing usage by existing customers.

2.6.2 Market development

In market development, a company seeks a growth strategy where the business will seek to sell its existing products into new markets. The possible ways of approaching this strategy will include exporting the products to new countries/geographical markets; new product development, new distribution channels like entering into lease agreements with transportation companies compared to buying own transportation vehicles; different pricing policies to attract different customers or create new market segments.

2.6.3 Product development

Product development as a growth strategy is where a company will introduce new products into existing markets. These products may be within the existing product categories and lines. This can also entail modification of products which appeal to more existing markets.

2.6.4 Diversification

Diversification is a form of growth marketing strategy for a company. It seeks to increase profitability through greater sales volume obtained from new products and new markets. Diversification can occur either at the business unit or at the corporate level. At the business

unit level, it is most likely to expand into a new segment of an industry in which the business is already in.

Ansoff (1987) pointed out that a diversification strategy stands apart from the other three product/market strategies. The three strategies are usually pursued with the same technical, financial, and merchandising resources used for the original product line, whereas diversification usually requires a company to acquire new skills, new techniques and new facilities. Therefore, diversification is meant to be the riskiest of the four strategies to pursue for a firm. Ansoff (1987) further classified diversification in three categories i.e. concentric, horizontal and conglomerate.

Concentric diversification means that there is a technological similarity between the industries, which means that the firm is able to leverage its technical know-how to gain some advantage. For example, a company that manufactures industrial adhesives might decide to diversify into adhesives to be sold via retailers. The technology would be the same but the marketing effort would need to change. It also seems to increase its market share to launch a new product which helps the particular company to earn profit.

Horizontal diversification is where a company adds new products or services that are technologically or commercially unrelated (but not always) to current products, but which may appeal to current customers. In a competitive environment, this form of diversification is desirable if the present customers are loyal to the current products and if the new products have a good quality and are well promoted and priced. Moreover, the new products are marketed to the same economic environment as the existing products, which may lead to rigidity and instability. In other words, this strategy tends to increase the firm's dependence on certain market segments. For example a company making note books and now starts manufacturing pens to capture and add its market share through its new product.

Horizontal integration occurs when a firm enters a new business (either related or unrelated) at the same stage of production as its current operations. For example, Avon's move to market jewelry through its door-to-door sales force involved marketing new products through existing channels of distribution. An alternative form that Avon has also undertaken is selling its

products by mail order (e.g., clothing, plastic products) and through retail stores (e.g., Tiffany's). In both cases, Avon is still at the retail stage of the production process.

Conglomerate diversification (or lateral diversification) is when the company markets new products or services that have no technological or commercial synergies with current products, but which may appeal to new groups of customers. The conglomerate diversification has very little relationship with the firm's current business. Therefore, the main reasons for adopting such a strategy are first to improve the profitability and the flexibility of the company, and second to get a better reception in capital markets as the company gets bigger. Even if this strategy is very risky, it could also, if successful, provide increased growth and profitability.

Although the Ansoff matrix is old, it remains a useful model for communication around business unit strategy processes and business growth. This study investigated which of these strategies Toyota and DT Dobie apply and to what extent.

2.7 Marketing Mix Strategies

The marketing mix comprises product, price, place and promotion activities (Table 3)

Table 3: Marketing mix strategies

Product	Quality, features, options, design, name, brand, packaging & labeling, sizes, ancillary services, guarantee/warranty
Price	List price, discounts, payment time, payment terms
Place	Distribution channels, coverage, location, storage, transport External accessibility, internal accessibility
Promotion	Personal selling, advertising, sales promotion, public relations

2.7.1 Product Related Strategies

Kotler (1993) noted that a product should be viewed in three levels of the core product, actual product and augmented product. The core product deals with the core benefit that a product offers. Customers who purchase a camera are buying more than just a camera; they are purchasing memories. The actual product aims to ensure that potential customers purchase that

specific product. The strategy at this level involves organizations' branding, adding features and benefits to ensure that the company's product offers a differential advantage from competitors. Augmented product deals with the non-tangible benefits that a product can offer. Competition at this level is based around after sales service, warranties, delivery and so on.

When placing a product within a market many factors and decisions have to be taken into consideration. These include the product design, product quality, product features and the branding. *Product design* usually is the selling point for the organization such as the case for the iMAC, the new VW Beetle or the Dyson vacuum cleaner. Quality has to be consistent with other elements of the marketing mix. For instance, a premium based pricing strategy has to reflect the quality a product offers. Product features entail consideration of what will be added to increase the benefit offered to the target market (www.learnmarketing.net).

Branding is one of the most important decisions a marketing manager can make. The value of brands in today's environment is phenomenal. Brands have the power of instant sales; they convey a message of confidence, quality and reliability to their target market. A brand is a tool which is used by an organization to differentiate itself from competitors. For instance what is the value of a pair of Nike trainers without the brand or the logo? How does your perception change? Brand competitiveness is enhanced by a five – step process, namely:

Determine your competitive set: the company competitive set is the specific industry and niche in which it will be competing. In order to define its brand, the company must take a careful look around at those with whom it will be competing and define the arena in which they operate.

Create a well-defined value proposition: In other words: what value do you offer them? Why should customers choose you over your closest competitor? A good value proposition statement shows you really know your business and your customer base.

Identify the key differentiators: the product or service must stand out from the pack in some way in order to be successful in the marketplace. How does your differentiate itself from the competition.

Articulate a clear customer promise: What is the one thing that customers can expect every time they interact with your company? Is it a friendly smile? Guaranteed lowest rates? Make sure you articulate this promise. And, make absolutely sure you deliver on it, every time.

Outline your key value dimension rankings: a company needs to be realistic about where it will rank relative to the overall niche market on the key value dimension rankings.

2.7.2 Pricing Strategies

There are many ways to price a product. The use of any pricing strategy depends on the number of factors among them being the objective of the company and also the market dynamics for each product market segment. Premium pricing, penetration pricing, economy pricing, and price skimming are the four main pricing policies/strategies however there are other important approaches to pricing.

(Monroe, 2003) and Kotler (1993) observe that premium pricing uses a high price where there is uniqueness about the product or service. This approach is used where a substantial competitive advantage exists. Such high prices are charged for luxuries such as Mercedes Benz, Savoy Hotel rooms, and Concorde flights. Penetration Pricing is charged for products and services is set artificially low in order to gain market share. Once this is achieved, the price is increased. This approach was used by France Telecom and Sky TV. Economy pricing is a no frills low price. The cost of marketing and manufacture are kept at a minimum. Price Skimming is charging a high price because a company has a substantial competitive advantage. However, the advantage is not sustainable. The high price tends to attract new competitors into the market, and the price inevitably falls due to increased supply. Manufacturers of digital watches used a skimming approach in the 1970s. Once other manufacturers were tempted into the market and the watches were produced at a lower unit cost, other marketing strategies implemented.

Nagle, Thomas and Holden, Reed (2002), also observe that organizations use other approaches to pricing. *Psychological pricing* is used when the marketer wants the consumer to respond on basis of an emotional, rather than rational basis. For example, 'price point perspective' 99 cents not one dollar. *Product Line Pricing* is used where there is a range of products or

services where the pricing reflects the benefit of parts of the range. For instance, car washes. Basic wash could be \$2; wash and wax \$4 and the whole package \$6. *Optional Product Pricing* is adopted by companies that attempt to increase the amount customer spends once they start to buy. Optional 'extras' increase the overall price of the product or service. For example, airlines will charge for optional extras such as guaranteeing a window seat or reserving a row of seats next to each other. *Captive Product Pricing* is used where products have complements. Companies will charge a premium price where the consumer is captured. For example, a razor manufacturer will charge a low price and recoup its margin (and more) from the sale of the only design of blades which fit the razor.

Nagle *e.t.a.l* (2002) continues to argue that *Product Bundle pricing* is used by sellers to combine several products in the same package. This also serves to move old stock. Videos and CDs are often sold using the bundle approach. *Promotional pricing* used to promote a product and it is a very common application. There are many examples of promotional pricing including BOGOF (Buy One Get One Free). *Geographical pricing* is evident where there are variations in price in different parts of the world. *Value pricing* approach is used where external factors such as recession or increased competition force companies to provide 'value' products and services to retain sales.

2.7.3 Promotion Strategies

A successful product or service means nothing unless the benefit of such a service can be communicated clearly to the target market. An organization's promotional strategy can consist of advertising, public relations, sales promotions, personal selling and direct mail.

Advertising is any non personal paid form of communication using any form of mass media. Public relations involve developing positive relationships with the organization media public. The art of good public relations is not only to obtain favourable publicity within the media, but it also involves being able to handle successfully negative attention. Sales promotion is commonly used to obtain an increase short term sales. It could involve using money off coupons or special offers. Personal selling is the marketing of a product service on a one to one basis. Direct Mail is the sending of publicity material to a named person within an organization. It allows an organization to use its resources more effectively by allowing

organizations to send publicity material to a named person within the target segment. By personalizing advertising, response rates increase thus increasing the chance of improving sales (Kotler, 1993).

A push strategy in marketing is used when there has been a development or improvement on a new product which is unknown to the consumer. As there is no consumer demand in the product launch, the product and the information are "*pushed*" to the consumer by distribution and promotion. An example of this is a perfume product. Women do not request to smell a fragrance they never smelled before; it is simply "*pushed*" to them, through the advertisement. Due to the information asymmetry the producer tries by signalling to reduce the information gap between the consumer and the product. This is reached by promotion or other services like personal dialog.

Another meaning of the push strategy in marketing can be found in the communication between seller and buyer. In dependence of the used medium, the communication can be either interactive or non-interactive. For example, if the seller makes his promotion by television or radio, it's not possible for the buyer to interact with. On the other hand, if the communication is made by phone or internet, the buyer has possibilities to interact with the seller. In the first case information are just "*pushed*" toward the buyer, while in the second case it is possible for the buyer to *demand* the needed information according to his requirements.

A Pull marketing strategy is where you develop advertising and promotional strategies that are meant to entice the prospect to buy your product or service. In this system the consumer requests the product and "*pulls*" it through the delivery channel. An example of this is the car manufacturing company Ford Australia. Ford Australia only produces cars when they have been ordered by the customers. With pull marketing, you are trying to create a sense of increased, time limited value so that the customer will come into your store to buy (Robert, 2004).

2.7.4 Place/distribution Strategies

The organization must distribute the product to the user at the right place at the right time. Efficient and effective distribution is important if the organization is to meet its overall marketing objectives. If an organization underestimate demand and customers cannot purchase products because of it, profitability will be negatively affected.

Two types of channel of distribution methods are available. Indirect distribution involves distributing a product by the use of an intermediary such as manufacturer selling to a wholesaler and then on to the retailer. Direct distribution involves distributing direct from a manufacturer to the consumer. For instance, Dell Computers provides services directly to its target customers. The advantage of direct distribution is that it gives a manufacturer complete control over its product.

Depending on the type of product being distributed there are three common distribution strategies available. These are intensive distribution, extensive distribution and selective distribution. Intensive distribution is used commonly to distribute low priced or impulse purchase products such chocolates and soft drinks. *Exclusive distribution* involves limiting distribution to a single outlet. The product is usually highly priced, and requires the intermediary to place much detail in its display stand. An example is the sale of vehicles through exclusive dealers. *Selective distribution* involves choosing a small number of retail outlets to distribute the product. Selective distribution is common with products such as computers, television sets, and household appliances, where consumers are willing to shop around and where manufacturers operate in a large geographical spread. If a manufacturer decides to adopt an exclusive or selective strategy they should select an intermediary that has experience of handling similar products, credible and is known by the target audience. (Kotler, 2003).

The above brand and marketing strategies influence consumer response, and in Kenya today we see motor vehicle dealers putting a lot of energy to understand how consumers respond to different product features, prices, and advertising appeals and so on. Since these marketing strategies are mainly used in business today the proposed study will empirically investigate the

extent to which Toyota East Africa and DT Dobie Kenya use the strategies. The variables and relationships discussed in this chapter constituted the basis for the research methodology presented in the next chapter.

CHAPTER THREE

RESEARCH METHODOLOGY

3.1. Research Design

This study used a descriptive survey research design. Descriptive research describes data and characteristics about the population or phenomenon being studied. It answers the questions of *who, what, where, when* and *how* which was the subject of the study. Donald and Pamela (2003) and Boyd, Westfall and Stasch (1990), assert that a descriptive research is needed if the purpose of the study is to generate detailed information on key factors or attributes required to develop profiles of defined entities.

Descriptive survey research design involves observing and describing the behaviour of a subject without directly influencing it. This research design has also been used by marketing researchers to judge the habits of customers, or by companies wishing to judge the morale of staff (Martyn Shuttleworth 2008). In addition the design has been widely used here in Kenya by academic researchers including Mbau (2000), Makori (2006) and Awinyo (2008) among others.

3.2. Target Population

The target population for this study was composed of corporate customers of Toyota and DT Dobie in Kenya and the staff of these two companies. Toyota and DT Dobie have approximately 10,000 and 6,000 corporate and individual customers respectively. Corporate customers are approximately 150 and account for a large proportion of the sales volume. The target respondents from these corporate customers were the Chief Executive Officers, Transport, Finance Managers and drivers. These are the key influencers of and / or decision makers on the design and make of motor vehicle brand to be bought.

Toyota has approximately 350 employees which include 11 sales representatives, 2 sales managers and 1 marketing manager. On its part DT Dobie has approximately 300 employees who include 18 sales representatives, 2 sales managers and 1 marketing manager which

constituted part of the target population. These employees are the ones directly involved with the customers in selling, promotions and strategy formulation.

3.3. Sample design

The first sample comprised sales managers, marketing managers and sales representatives of Toyota (East Africa), and DT Dobie. The second sample embraced corporate customers who were represented by decision makers / influencers in the areas of finance and technical docket. These included the Chief Executive Officers, Transport, Finance Managers and drivers in these companies. Systematic random sampling was used to select corporate customers and the respective respondents to be interviewed using the list in appendix 5. Out of the 150 corporate customers based in Nairobi a sample of 30 corporate customers were selected.

3.4. Data Collection Method

The study mainly relied on primary data collected using partially structured questionnaires. The first questionnaire collected data from the sampled corporate customers while the second questionnaire solicited relevant data from sampled respondents of the two companies (Toyota and DT Dobie). The questionnaire had both closed and open-ended questions. Part A of the questionnaires gathered data on the profile of the respondents. Part B gathered data that answered the research questions for the study. The questionnaires used a Likert - type scale where appropriate. The relevant questionnaires are included in appendix 2, 3 and 4 respectively.

The questionnaires were sent to the target respondents through e-mail since the target samples are corporate and have email, and some were dropped to the relevant offices with an introductory letter. To enhance the response rate the researcher made relevant follow -ups with the sampled respondents.

3.5. Data Analysis and presentation

Data analysis is the extraction of meaningful information from the raw data. In the current study data analysis involved editing, coding and tabulation and computation of descriptive statistics. In the study most of the questions/statements were pre-coded since most of them

were close ended and this made editing and tabulating easy to carry out (Saunders and Thornhill, 2007). The coding was done in a way that allowed creation of data matrix suitable for processing by the Statistical Package for Social Sciences (SPSS) and the Microsoft Excel.

The data analysis entailed computation of measures of central tendency and measures of dispersion. The measures of central tendency computed included Mean scores and percentages. The research results are presented in tables and charts with narrative explanation of the findings.

CHAPTER FOUR

DATA ANALYSIS AND INTERPRETATIONS

4.1 Introduction

This chapter explains how the data has been analyzed and the findings. Descriptive statistics has largely been used to summarize the data. The findings are presented in sections that cover the profile of the respondents, media that are used, and the marketing strategies that are used by both DT Dobie and Toyota.

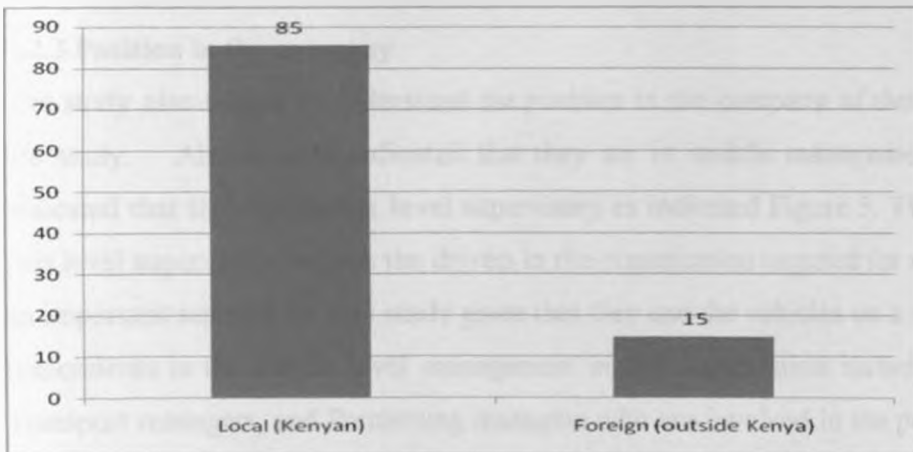
4.2 Respondents profile

The study had sought to establish the general profile of the corporate clients who responded to this study. The findings are analyzed and presented in the ensuing sections. A total of 41 questionnaires were completed and analyzed.

4.2.1 Place of registration/incorporation

Out of the corporate respondents, 85% of the companies that responded to this survey indicated that they were locally registered while only 15% are foreign that is registered outside the country as indicated in Figure 3.

Figure 3 - Place of registration

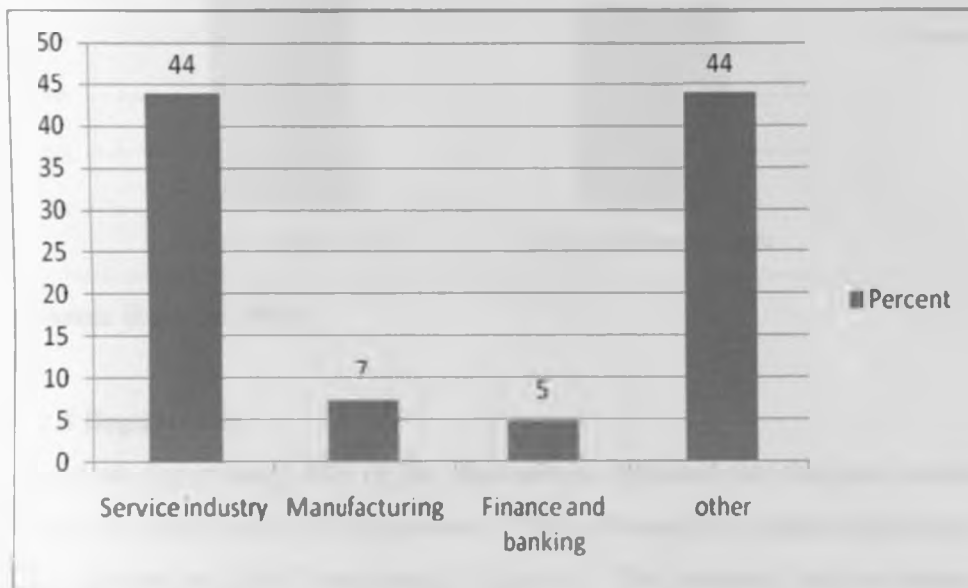


Source: Research data

4.2.2 Nature of operation

As indicated in Figure 4, some 44% of the respondent companies indicated that they operate in the service industry. Seven percent indicated that they are in manufacturing, 5% in finance and banking and another 44% indicated “others”.

Figure 4 – Nature of operation

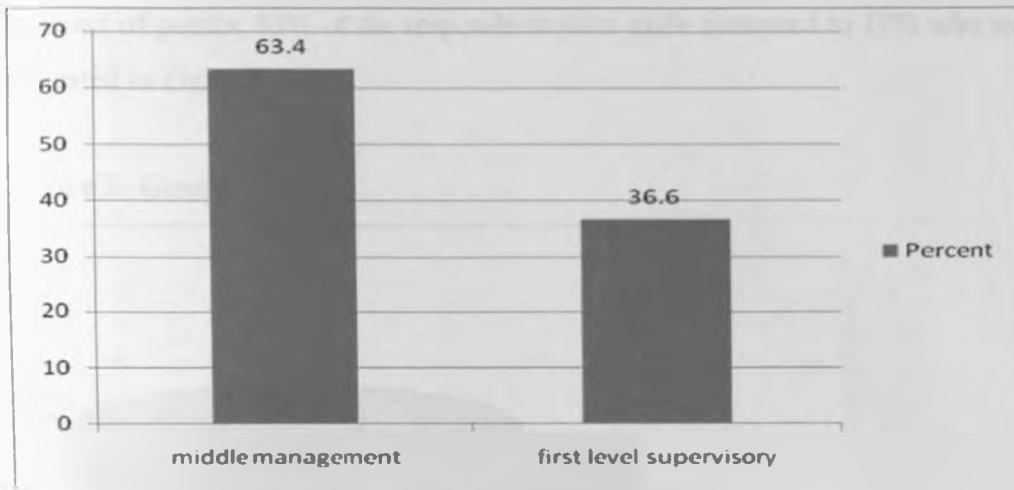


Source: Research data

4.2.3 Position in the company

The study also sought to understand the position in the company of those who responded to the study. Almost 63% indicated that they are in middle management while about 37% indicated that they are in first level supervisory as indicated Figure 5. The respondents in the first level supervisory include the drivers in the organization targeted for the study. Drivers are an important segment for this study given that they use the vehicles on a day to day basis. The respondents in the middle level management in any organization include Finance managers, Transport managers, and Purchasing managers who are involved in the purchasing of vehicles in their organization.

Figure 5 – Position in the company

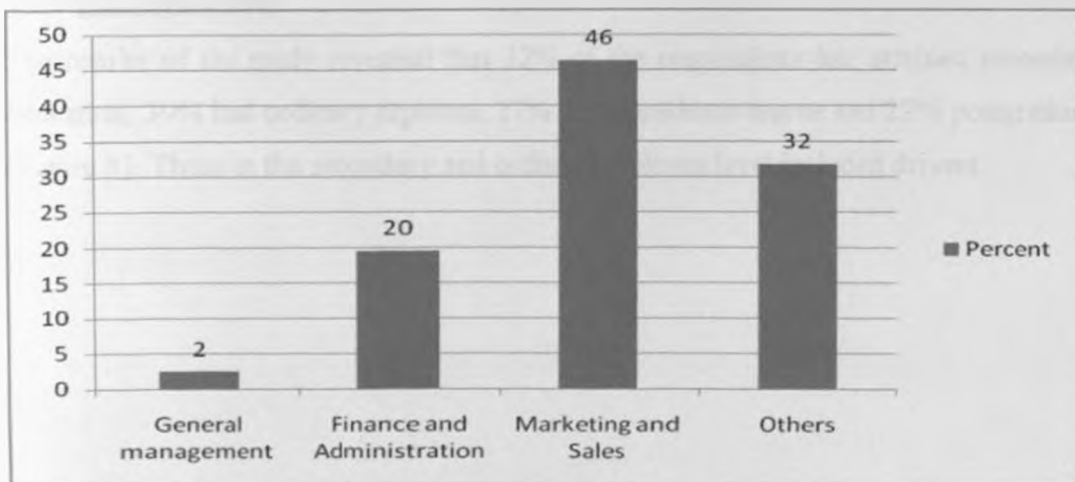


Source: Research data

4.2.4 Department

Based on department, 46% of the respondents indicated that they are in marketing and sales while 2% are in general management, 20% in Finance and administration and 32% indicated that they are in other departments (Figure 6). The transport and purchasing managers who responded to this study have been categorized either under general management or the finance and administration departments depending on the structure of the organization.

Figure 6 – Position in the company

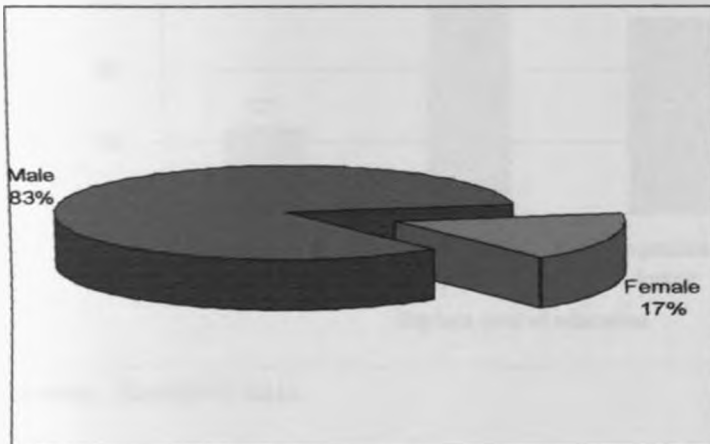


Source: Research data

4.2.5 Gender

In terms of gender, 83% of the respondents were male compared to 17% who were female as indicated in Figure 7.

Figure 7- Gender



Source: Research data

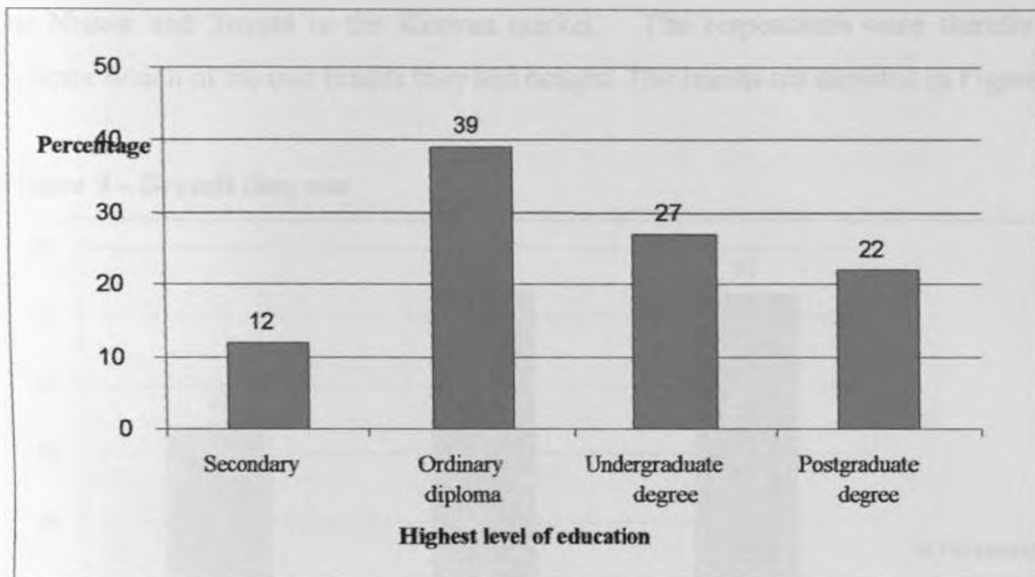
4.2.6 Marital status

A majority of the respondents (80%) indicated that they were married while the rest (20%) indicated that they are single.

4.2.7 Education level

The results of the study revealed that 12% of the respondents had attained secondary level education, 39% had ordinary diploma, 27% undergraduate degree and 22% postgraduate level (Figure 8). Those in the secondary and ordinary diploma level included drivers.

Figure 8- Highest education level attained



Source: Research data

4.2.8 Length of time worked in the organization

The study also sought to establish how long the respondents had worked with the organization. The findings are indicated in Table 4.

Table 4 - Length of time that you have worked in the organization

Length of time	Frequency	Percentage
1-2 years	15	37
3-5 years	5	12
6-10 years	15	37
over 10 years	6	15
Total	41	100

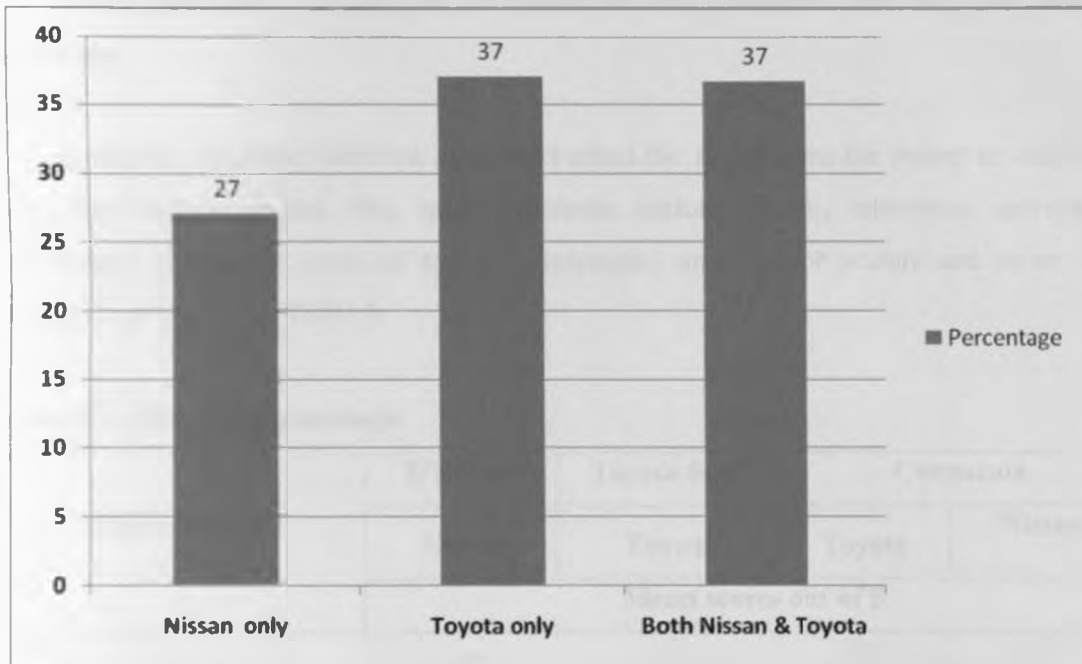
Source: Research data

As shown in Table 1, 64% of the respondents had worked in their organizations for a period of more than 3 years.

4.3. Brands bought

One of the objectives of this study was to establish the preference of the two brands namely the Nissan and Toyota in the Kenyan market. The respondents were therefore asked to indicate which of the two brands they had bought. The results are depicted in Figure 9.

Figure 9 - Brands they use



Source: Research data

Some 37% of the respondents indicated that they use the Toyota brand only, 27% indicated they only use the Nissan brand only. Another of respondents indicated that they use both the Toyota and the Nissan brands. Comparatively, it can therefore be argued that the Toyota brand is more popular among the corporate customers.

4.4. Media channel usage

One way through which companies raise the awareness of their brands is by the use of different media. The study sought to establish the media that DT Dobie and Toyota East Africa use in raising the awareness level of their brands. The study sought the perception of this aspect both from the staff in the respective two companies and also the corporate customers.

The researcher identified different media and asked the respondents the extent to which they used the various media. The media channels included radio, television, newspapers, newsletters, magazines, word of mouth, salespeople, and outdoor posters and so on. The results are presented in Table 5.

Table 5 – Media channel usage

Media channel	DT Staff	Toyota Staff	Corporate	
	Nissan	Toyota	Toyota	Nissan
	Mean scores out of 5			
Radio	3.64	3.14	2.43	2.22
Television	3.09	4.43	2.09	2.26
Newspapers	2.18	2.00	2.87	3.00
Newsletters	3.36	3.71	2.74	2.96
Magazines	3.36	3.29	3.57	3.48
Word of mouth	2.36	2.14	2.91	2.74
Sales people	1.55	1.29	2.48	2.35
Outdoor posters	3.27	2.43	2.04	1.96
Overall mean score	2.85	2.80	2.64	2.62

Source: Research data

Out of a maximum possible mean score of 5, the ratings on the media usage by DT staff indicate that DT Dobie to a large extent uses more of radio (mean score = 3.64), newsletters and magazines at mean score = 3.36 each and outdoor posters (mean score = 3.70) to promote

their Nissan brand. On the other hand, the Toyota staff indicated that they to a large extent use more of television (mean score = 4.43) to promote their Toyota brand. This is followed by other media channels of newsletters (mean score = 3.71) and magazines (mean score = 3.29)

The Corporate buyers who are the major buyers of the two brands indicated that Toyota East Africa uses more of the print media to raise the awareness of their brand. They indicated that Toyota to a large extent uses magazines (mean score = 3.57), word of mouth (mean score = 2.91), newspapers (mean score = 2.87) and newsletters at (mean score = 2.74).

Regarding the Nissan brand, the Corporate customers indicated that DT Dobie like Toyota East Africa to a large extent use the same media channels in raising the awareness of their Nissan brand with magazines (mean score = 3.48) followed by newspapers (mean score = 3.00), newsletters (mean score = 2.96) and word of mouth (mean score = 2.74).

There was a wide disparity among the corporate customers and the staff in the two Auto companies regarding the extent of using the sales people in raising the awareness of the brands. On the one hand, the corporate customers perceived that the two motor vehicle companies use their sales people to a large extent while the staff from the two companies perceived that it is to a small extent. This wide difference in perception may be attributed to the fact that the corporate clients are always assigned corporate sales person who attend to their needs and at the same time inform them of new products in the respective companies.

4.5 Marketing strategies

One of the objectives of this study was to assess the extent to which the marketing strategies applied by the two motor vehicle marketing companies accounted for the brands' popularity.

The researcher had asked the respondents to indicate the extent to which marketing strategies were applied by the respective motor vehicle marketing companies in raising awareness of their brands and hence contribute towards increase of their popularity. A summary of the result is presented in Table 3 with detailed findings under each P given in subsequent sections.

Among the four broad marketing strategies, DT Dobie staff indicated that they to a large extent use pricing (mean score = 3.0), promotional (mean score = 2.55) and distribution (mean score = 3.16) strategies. They indicated that DT Dobie to a small extent uses product strategy (mean score = 2.02). Toyota staff on the other hand indicated that their company to a large extent uses pricing and distribution strategies with mean scores of 3.12 and 3.04 respectively while promotional and product strategies with mean scores of 2.42 and 1.83 were used to a small extent.

Table 6 – Summary of the marketing mix strategies applied

Marketing mix strategy	DT Dobie Staff	Toyota Staff	Corporate	
	Nissan	Toyota	Toyota	Nissan
	Mean scores out of 5			
Product strategy	2.02	1.83	1.87	2.03
Pricing Strategy	3.00	3.12	2.55	2.50
Promotional strategies	2.55	2.42	2.55	2.54
Distribution strategies	3.16	3.04	2.90	2.83
Average	2.68	2.60	2.47	2.47

Source: Research data

The Corporate customers on the other hand indicated that comparatively, Toyota East Africa uses all strategies of pricing (mean score = 2.55), promotional (mean score = 2.55) and distribution (mean score = 2.90) except product to promote their Toyota brand. On the other hand DT Dobie was scored as using more on the product strategy (mean score = 2.03) over Toyota (mean score = 1.87) by the corporate customers.

Overall it is observed that the strategies that are principally used mainly by the two motor vehicle marketing companies are the distribution strategies, promotional and pricing strategies. Toyota East Africa, according to this study, applies these strategies (distribution, promotional and pricing) to a higher extent compared to DT Dobie.

4.5.1 Product strategies

The respondents were asked to rate the two brands with regard to various product attributes. The ratings are presented in Table 7.

Table 7 – Product strategies of the two companies

Product Strategies	DT Dobie	Toyota	Corporate	
	Staff	staff		
	Nissan	Toyota	Toyota	Nissan
Mean scores out of 5				
The brand name of the vehicles is appealing	2.18	1.71	2.04	2.04
The features of the vehicles are well differentiated from those of competitors	0.45	2.43	1.74	1.96
The benefits of the vehicles offer a differential advantage compared with those of competitors	2.45	2.14	1.39	1.61
The design of the vehicles is appealing.	2.09	1.86	1.57	1.61
The vehicles are of high quality	1.82	1.29	1.83	1.83
The vehicles offer reliable service	1.73	1.14	2.13	2.26
The company offers good after-sales service	2.36	1.86	2.26	2.30
The company offers effective on call service response to customers	2.55	2.14	1.87	2.00
The maintenance costs of the vehicles are relatively low.	2.82	2.43	1.35	1.83
The spare parts are easily available	2.55	2.00	1.39	2.00
They have genuine spare parts	1.55	1.43	2.13	2.04
The vehicles are durable	1.73	1.57	2.74	2.87
Average rating	2.02	1.83	1.87	2.03

Source: Research data

The attributes that the DT Dobie staff to a large extent scored their Nissan brand highest were maintenance costs of the vehicles are relatively low (mean score = 2.82), The spare parts are easily available (mean score = 2.55) and the company offers effective on call service response

to customers (mean score = 2.55). On the other hand, DT Dobie staff to a small extent agreed with product differentiation features of the Nissan brand that scored lowest mean score of 0.45 out of 5.

The Toyota East African staff on the other hand scored their Toyota brand highest in the product differentiation aspect (mean score = 2.43) and on low maintenance aspects (mean score = 2.43) even though the scores still fell within the small extent range. The lowest scores were in the reliability of service (mean score = 1.14) genuine (mean score = 1.43) spare parts and the durability of the vehicles (mean score = 1.57).

The corporate customers' ratings on the Toyota brand were relatively higher compared to those Toyota staff ratings on the aspects of brand name (mean score = 2.04), reliable services (mean score = 2.13), after sales service (mean score = 2.26), genuine spare parts (mean score = 3.13) and durability of the brand (mean score = 2.74). On the other hand the Corporate ratings on the Nissan brand were relatively higher compared to the DTD Dobie staff ratings on the product attributes in terms of features being well differentiated (mean score = 1.96), High quality (mean score = 1.83), reliable service (mean score = 2.26) and genuine spare parts (mean score = 2.04) and durability of the Nissan brand (mean score = 2.87).

Comparatively, the corporate respondents offered relatively higher ratings to the Nissan brand over the Toyota brand on most attributes. These included the features of the vehicles are well differentiated from those of competitors, the benefits of the vehicles offer a differential advantage compared with those of competitors; the vehicles offer reliable service, the company offers good after-sales service, the company offers effective on call service response to customers, the maintenance costs of the vehicles are relatively low, the spare parts are easily available and the vehicles are durable

4.5.2 Pricing strategies

The researcher also analyzed pricing on various aspects whose findings are represented in Table 5. The DT Dobie staff indicated that they "to a large extent" apply all the price related aspects to their Nissan brand save for one aspect namely the company charges a premium price for any unique features of their vehicle with a mean score of 2.27. The highest attributes

Corporate respondents on the other hand mentioned that the Toyota East Africa company uses most of the price aspects to gain and increase their market share compared to the ones applied by the DT Dobie on their Nissan brand. Corporate customers felt that Toyota scored lower (mean score = 2.48) compared to DT Dobie's (mean score = 2.91) on "company's pricing strategy being consistent with the benefits of brands that they offer". Toyota also scored lower (mean score = 2.39) compared to DT Dobie (mean score = 2.74) with regard to the "company keeping the cost of marketing and manufacture at a minimum level for its brands".

4.5.3 Promotional strategies

Promotional activities play a significant role in raising the awareness and usage of a product and service. The motor vehicle marketing companies use a number of promotional strategies. An analysis of the strategies that they use is indicated in Table 6.

The DT Dobie respondent mentioned staff indicated that their company applies the following promotional strategies "highly". They assert that DT Dobie carries out effective communication campaign that comprises a well thought out message strategy (mean score = 3.27); DT Dobie uses direct mail in sending publicity material (mean score = 3.18), It has a high participation in exhibitions (mean score = 3.09) and the company offers materials to customers that have corporate logos (mean score = 3.00). DT Dobie staff on the other hand asserted that the company does not use effective trade promotions (Mean score of 1.45).

The ratings by the Toyota East Africa staff showed that the Company almost applies all the promotional strategies equally given that most of them received a mean score of between 2.00 and 3.00.

An analysis of the ratings by corporate customers showed that DT Dobie applies promotional strategies to a less extent than Toyota. The company has a more positive relationship with media organizations; the company uses the right media channels in executing its messages; it uses effective consumer promotion strategies; it offers materials to customers that have corporate logos and that it participates in sponsorships. Toyota East Africa seemed to have an

that they scored were “the company charges artificially low prices in order to gain market share (mean score = 3.64)” and “the company offers a promotional price that is used to promote the vehicles (mean score = 3.36)”.

Table 8 – Pricing strategies of the two companies

Pricing strategies	DT Dobie staff	Toyota Staff	Corporate	
	Nissan	Toyota	Toyota	Nissan
	Mean scores out of 5			
The company charges a premium price for any unique features of their vehicle	2.27	2.71	2.91	2.87
The company charges artificially low prices in order to gain market share	3.64	3.57	2.91	2.30
The company keeps the cost of marketing and manufacture at a minimum level for its brands	3.09	4.00	2.39	2.74
The company charges a high price because it has a competitive advantage.	2.91	2.71	2.61	2.52
The company's pricing strategy is consistent with the benefits of brands that they offer.	2.73	2.43	2.48	2.91
The pricing strategy that the company uses aims at making consumers to respond on an emotional, rather than rational basis.	3.00	3.29	2.35	2.09
The company offers a promotional price that is used to promote the vehicles	3.36	3.14	2.17	2.09
Average (Mean score)	3.00	3.12	2.55	2.50

Source: Research data

The Toyota staff on the other hand revealed that they use all the price related aspects for their Toyota brand “to a large extent” except for one aspect namely the Company’s pricing strategy is consistent with the benefits of brands that they offer (mean score = 2.43).

upper edge in applying a wide variety of the promotional strategies for its Toyota brand compared to DT Dobie's application for its Nissan brand (Table 9).

Table 9 – Promotional strategies of the two companies

Promotional strategies	DT Dobie Staff	Toyota Staff	Corporate	
	Nissan	Toyota	Toyota	Nissan
	Mean scores out of 5			
The company has a positive relationship with media organizations.	2.00	2.29	2.65	3.04
The company offers good special offers/coupons in their sales promotion	2.00	2.86	3.00	2.61
The company uses direct mail in sending publicity material.	3.18	2.43	2.43	2.35
The company carries out effective communication campaign that comprises a well thought out message strategy.	3.27	2.57	2.91	1.83
The company uses the right media channels in executing their messages	2.55	2.29	2.22	2.39
The company uses effective personal selling.	2.18	2.29	2.26	2.00
The company uses effective trade promotions	1.45	2.14	2.30	2.22
The company uses effective advertising.	2.27	2.29	2.17	2.39
The company uses effective consumer promotion strategies.	2.27	2.14	2.17	2.26
The company has a high participates in exhibitions	3.09	2.71	2.83	3.39
The company offers materials to customers that have corporate logos	3.00	2.57	2.65	3.22
The company's involves itself in charitable activities.	2.91	2.14	3.13	2.65
The company participates in sponsorships	2.91	2.71	2.43	2.70
Average (mean score)	2.55	2.42	2.55	2.54

Source: Research data

4.5.4 Distribution strategies

An analysis was also done to establish the distribution strategies that the companies use. The findings are shown in Table 7.

The ratings by DT Dobie Staff regarding the distribution strategies used by their company for the Nissan brand revealed that they “to a large extent” use the various distribution strategies. The strategy that the company applies but comparatively scored low was the use of exclusive distribution through a single outlet.

The Toyota East Africa staff mentioned that the company uses different distribution strategies to a large extent save for one namely distributing its vehicles directly from the manufacturer to the consumer (a mean score = 2.43).

Table 10 – Distribution strategies

Distribution strategies	DT Dobie staff	Toyota staff	Corporate	
	Nissan	Toyota	Toyota	Nissan
	Mean scores out of 5			
The company distributes its product through market intermediaries(dealers)	3.27	3.00	2.74	2.35
The company distributes it vehicles directly from the manufacturer to the consumer.	3.18	2.43	2.39	2.57
The company uses exclusive distribution through a single outlet	2.55	3.29	3.26	3.22
The company chooses a small number of retail outlets to distribute its vehicles.	3.64	3.43	3.22	3.17
Average (Mean score)	3.16	3.04	2.90	2.83

Source: Research data

Corporate customers felt that the Toyota has an upper hand in the distribution strategies that they apply compared to the DT Dobie. Among the four strategies, Toyota was scored relatively higher than DT Dobie. Comparatively, the Corporate respondents mentioned indicated that Toyota applies the strategies of distributing its product through market intermediaries (dealers); uses exclusive distribution through a single outlet and chooses a small number of retail outlets to distribute its vehicles than DT Dobie.

CHAPTER FIVE

SUMMARY, DISCUSSIONS AND CONCLUSIONS

5.1 Introduction

This chapter discusses the findings from the data that was analyzed and the conclusions reached. The findings have been summarized on basis of the objectives of the study; conclusions have been drawn; and recommendations for action advanced.

5.2 Summary

The objectives of the study were to determine which company's brands are more popular to corporate buyers in Kenya and to assess the extent to which the applied marketing strategies influence the brand's popularity.

In terms of sample demographics the results of the study revealed that 85% of the corporations were locally registered while the others (15%) were foreign. More than half (63%) of the respondents indicated that they were in middle management while 37% indicated that they were in supervisory level. The first level category incorporates drivers while the middle management includes transport managers and purchasing managers. These respondents, in any organization are involved in the day to day running of their firms and therefore their information can be relied on.

Almost half (46%) of the respondents to this survey mentioned that they work in marketing and sales department while 2% are in general management, 20% in Finance and administration and 32% in other departments. The sample had also included transport and purchasing managers who can either fall within the general management or finance and administration department depending on the structure of the organization.

Some 60% of the respondents had worked in their respective organizations for a period of more than 3 years. This means that the information that they provided was based on a long term experience.

Brands bought

One of the objectives of this study was to establish the preference of the two brands i.e. Nissan and Toyota in the Kenyan market. Some 37% of the respondents mentioned that they use Toyota brand only, 27% indicated they only have Nissan brand. Another 37% of respondents mentioned that they have both the Toyota and the Nissan brands. On basis of the sample results it can be concluded that the Toyota brand is preferred to Nissan brand.

Media usage

One way by which companies increase awareness level of their brands is through use of different media. Overall it can be argued that the media used by the different motor vehicle marketing companies differ even though it can be concluded that most use the print media. Out of a possible mean score of 5, the ratings on the media usage by DT Dobie staff showed that DT Dobie “to a large extent” uses more of radio (mean scores = 3.64), newsletters and magazines (3.36 mean scores of each) and outdoor posters (mean scores = 3.70) to promote their Nissan brand.

On their part, the Toyota staff the company “to a large extent” uses more of television (mean scores = 4.43) to promote its Toyota brand. This is followed by other media channels of newsletters (mean scores = 3.71) and magazines (mean scores = 3.29).

The Corporate respondents on the other hand who are the major buyers of the two brands indicated that Toyota East Africa uses more of the print media to raise the awareness of its brand. They mentioned that Toyota “to a large extent” uses magazines (mean scores = 3.57), word of mouth (mean scores = 2.91), newspapers (mean scores = 2.87) and newsletters (mean scores = 2.74). Regarding the Nissan brand, the Corporate respondents indicated that DT Dobie like Toyota “to a large extent” use the same media channels in raising the awareness of its Nissan brand with magazines (mean scores = 3.48) followed by newspapers (mean scores = 3.00), newsletters (mean scores = 2.96) and word of mouth (mean scores = 2.74).

Overall marketing strategies

One of the objectives of this study was to assess the extent to which the marketing strategies applied by the two motor vehicle marketing companies accounted for the brands' popularity.

The Corporates on the other hand indicated that comparatively, Toyota East Africa uses all strategies of pricing (mean scores = 2.55), promotion (mean scores = 2.55) and distribution (mean scores = 2.90) except product to promote their Toyota brand. On the other hand DT Dobie was scored as using more the product strategy (mean scores = 2.03) over Toyota (mean scores = 1.87) by the corporate customers.

Overall it can be observed that the strategies that are used mainly by the two motor vehicle marketing companies are the distribution strategies, promotional and pricing strategies.

Product strategies

The Corporate respondents accorded relatively higher ratings to the Nissan brand over the Toyota brand on some aspects. These included that “the features of the vehicles are well differentiated from those of competitors”, “the benefits of the vehicles offer a differential advantage compared with those of competitors”,” the vehicles offer reliable service, the company offers good after-sales service”, “the company offers effective on call service response to customers”, “the maintenance costs of the vehicles are relatively low”, “the spare parts are easily available and the vehicles are durable”.

Pricing strategies

The corporate respondents mentioned that the Toyota Company uses most of the price aspects to gain and increase its market share compared to the ones applied by the DT Dobie on the Nissan brand. The respondents felt that Toyota scored lower (mean scores = 2.48) than DT Dobie’s (mean scores = 2.91) on “company’s pricing strategy being consistent with the benefits of brands that they offer”. Toyota also scored lower (mean scores = 2.39) than DT Dobie (mean scores = 2.74) with regard to the “company keeping the cost of marketing and manufacture at a minimum level for its brands”.

Promotional strategies

An analysis of the ratings by corporate respondents showed that DT Dobie applies some promotional strategies more than Toyota. These include the company having a more positive relationship with media organizations; the company uses the right media channels to execute

its messages; the company uses effective consumer promotion strategies; the company offers materials to customers that have corporate logos and the company participates in sponsorships. Otherwise, Toyota seemed to have an upper edge in applying a wide variety of the promotional strategies for its Toyota brand compared to DT Dobie's application for its Nissan brand.

Distribution strategies

The corporate respondents felt that Toyota has an upper hand in the distribution strategies that it applies when compared with the DT Dobie. Thus Toyota was scored relatively higher than DT Dobie on all the four strategies. The strategies Toyota uses for distributing its product are through market intermediaries (dealers), using exclusive distribution through a single outlet; and chooses a small number of retail outlets to distribute its vehicles.

Conclusion

Overall, the two marketing companies use the various marketing strategies to increase the awareness of their products and increase their market share. It can be observed that the strategies that are used mainly by the two motor vehicle marketing companies are distribution, promotion and pricing strategies. Toyota East Africa uses the various tactics under these strategies more often than DT Dobie for its Nissan brand. This may have accounted for the higher popularity of the Toyota brand in Kenya than the Nissan brand.

5.3 Limitations of the Study

The study concentrated on the corporate customers based in Nairobi area. Although Nairobi constitutes a big share of the motor vehicle business, the results may not be generalizable to the entire country. Further the study did not include the retail customers. The study also did not include the retail customers.

5.4 Recommendations

There are no significant differences in the product features of the two brands (Nissan and Toyota). However, from the study it is clear that the Toyota brand applies more of the distribution, pricing and promotional strategies. This has possibly led to the Toyota brand

being more popular. It is therefore recommended that DT Dobie uses the same marketing strategies more intensively to increase popularity of its Nissan brand.

In addition because the study concentrated on corporate customers based in Nairobi region, It is recommended that a similar study be carried nationally to see if the same results would be found. Finally it is recommended that a similar study be done on the retail customers and house hold buyers.

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APPENDICES

APPENDIX 1: LETTER OF INTRODUCTON TO THE RESPONDENT

University of Nairobi,
School of Business
P.O.Box 30197, 00100
Nairobi
Email: mbahati@dt Dobie.co.ke

06 August 2009

Dear Respondent

RE: COLLECTION OF SURVEY DATA

I am a postgraduate student undertaking a Master of Business Administration Degree Programme at the School of Business, University of Nairobi. I am currently undertaking a management research project on marketing strategies used by the Nissan and Toyota brands in Kenya.

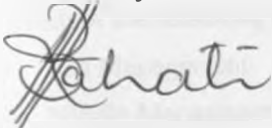
You have been selected to form part of this study because of the strategic information that you have on the motor vehicle industry business. I therefore kindly request you to assist me collect the data by filling out the accompanying questionnaire.

The information data that you provide will be used exclusively for academic purposes. My supervisor and I assure you that the information you give will be treated with strict confidence.

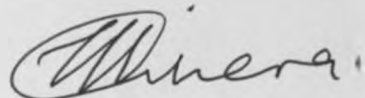
A copy of the research project will gladly be availed to you upon request.

Thank you in advance for your anticipated cooperation.

Yours faithfully,



Mapenzi Bahati
MBA Student



Francis N. Kibera. PhD
Professor of marketing and
University Supervisor

APPENDIX 2:

AN EMPIRICAL INVESTIGATION OF MARKETING STRATEGIES APPLIED ON TOYOTA AND NISSAN BRANDS IN KENYA. QUESTIONNAIRE FOR DT DOBIE & CO. (K) LTD EMPLOYEES

Instruction:

Please answer all the questions to the best of your knowledge. There are not right or wrong answers. Your beliefs, opinions, evaluations and behaviour are what is important. Once again be assured that your individual responses will not be revealed to a third party. They will only be used to compute percentages, proportions, and average scores.

Section A – Respondent profile

- 1) The name Company/Organization is (Optional) _____

- 2) Where it is registered/incorporated
 - a) Local (Kenyan) []
 - b) Foreign (Outside Kenya) []
 - c) Other - specify _____

- 3) What is the nature of operation of your company (Tick all that apply)
 - a) Manufacturing []
 - b) Service Industry []
 - c) Education []
 - d) Finance and Banking []
 - e) Other (Specify) _____

- 4) Which of the following best describes your position?
 - a) Top Management []
 - b) Middle Management []
 - c) First level supervisory []
 - d) Other (specify) []

- 5) Department in which you work.
 - a) General management []
 - b) Finance & Administration []

- c) Marketing and sales []
- d) Other (specify) _____

6) Your gender

- Female [] Male []

7) Your age categories (Tick as applicable)

- a) Under 25 years []
- b) 25 – 35 years []
- c) 35 – 45 years []
- d) 45 – 55 years []
- e) Over 55 years []

8) Your Marital Status (tick as appropriate)

- a) Single [] b) Married []
- c) Other (specify) _____

9) What is your highest level of education?

- a) Secondary (form IV) [] b) Ordinary Diploma []
- c) Undergraduate Degree [] d) Postgraduate Degree []
- e) Other (specify) _____

10) Length of time that you have worked in the organization.

- a) Less than 1 year [] b) 1-2 years []
- c) 3-5 years [] d) 6-10 years []
- e) Over 10 years []

Section B – Marketing strategies pursued

11) What brand of vehicles does your organisation sell?

- a) Nissan [] b) Toyota []

Organizations tend to engage in different marketing activities to achieve their marketing objectives of increasing consumer awareness of their brands and to increase their market share. The marketing activities that the organisations usually pursue relate to the product (brand), pricing, promotion and distribution. Please indicate the extent to which your companies use different marketing activities to achieve the objectives of increased awareness and also increased sales.

Please answer the following questions in relation to the main brand that your organisation sells (NISSAN)

11) To what extent does DT Dobie use the following media to increase awareness and sales of its brands?

Media usage	To Very Large extent	To Large extent	To Moderate extent	To Small extent	Not at all
Radio					
Television					
Newspapers					
Newsletters					
Magazines					
Word of Mouth					
Sales people					
Outdoor posters					
Other specify _____					

12) To what extent does DT Dobie use the following product strategies/ activities in ensuring that you increase the awareness and sales of the brands?

Product strategies	To Very Large extent	To Large extent	To Moderate extent	To Small extent	Not at all
The brand name of the vehicles is appealing					
The features of the vehicles are well differentiated from those of competitors					
The benefits of the vehicles offer a differential advantage compared with those of competitors					
The design of the vehicles is appealing.					
The vehicles are of high quality					
The vehicles offer reliable service					
The company offers good after-sales service					
The company offers effective on call service response to customers					
The maintenance costs of the vehicles are relatively low.					
The spare parts are easily available					
They have genuine spare parts					
The vehicles are durable					
Other specify					

13) To what extent does DT Dobie use the following pricing strategies/activities in ensuring that it increases the awareness and sales of its brands?

Pricing strategies	To Very Large extent	To Large extent	To Moderate extent	To Small extent	Not at all
The company charges a premium price for any unique features of their vehicle					
The company charges artificially low prices in order to gain market share					
The company keeps the cost of marketing and manufacture at a minimum level for its brands					
The company charges a high price because it has a competitive advantage.					
The company's pricing strategy is consistent with the benefits of brands that they offer.					
The pricing strategy that the company uses aims at making consumers to respond on an emotional, rather than rational basis.					
The company offers a promotional price that is used to promote the vehicles					

14) To what extent does the Company use the following **promotional strategies /activities** in ensuring that it increases the awareness and sales of its brands?

Promotional strategies	To Very Large extent	To Large extent	To Moderate extent	To Small extent	Not at all
The company adverts can easily be remembered.					
The company has a positive relationship with media organisations.					
The company offers good special offers/coupons in their sales promotion					
The company uses direct mail in sending publicity material.					
The company carries out effective communication campaign that comprises a well thought out message strategy.					
The company uses the right media channels in executing their messages					

	To Very Large extent	To Large extent	To Moderat e extent	To Small extent	Not at all
Promotional strategies					
The company uses effective personal selling.					
The company uses effective trade promotions					
The company uses effective advertising.					
The company uses effective consumer promotion strategies.					
The company has a high participates in exhibitions					
The company offers materials to customers that have corporate logos					
The company's involves itself in charitable activities.					
The company participates in sponsorships					
Other specify					

15) To what extent does the Company use the following distribution activities in ensuring that it increases the awareness and sales of its brands?

	To Very Large extent	To Large extent	To Modera te extent	To Small extent	Not at all
Distribution strategies					
The company distributes its product through market intermediaries(dealers)					
The company distributes it vehicles directly from the manufacturer to the consumer.					
The company uses exclusive distribution through a single outlet					
The company chooses a small number of retail outlets to distribute its vehicles.					

16) Please provide information about marketing strategies adopted by your organisation towards the Nissan brand in Kenya?

Thank you for taking time to complete this questionnaire

APPENDIX 3:

AN EMPIRICAL INVESTIGATION OF MARKETING STRATEGIES APPLIED ON TOYOTA AND NISSAN BRANDS IN KENYA.

QUESTIONNAIRE FOR TOYOTA EAST AFRICA LTD EMPLOYEES

Instruction:

Please answer all the questions to the best of your knowledge. There are not right or wrong answers. Your beliefs, opinions, evaluations and behaviour are what is important. Once again be assured that your individual responses will not be revealed to a third party. They will only be used to compute percentages, proportions, and average scores.

Section A – Respondent profile

17) The name Company/Organization is (Optional) _____

18) Where it is registered/incorporated

- a) Local (Kenyan) []
- b) Foreign (Outside Kenya) []
- c) Other - specify _____

19) What is the nature of operation of your company (Tick all that apply)

- a) Manufacturing []
- b) Service Industry []
- c) Education []
- d) Finance and Banking []
- e) Other (Specify) _____

20) Which of the following best describes your position?

- a) Top Management []
- b) Middle Management []
- c) First level supervisory []
- d) Other (specify) []

21) Department in which you work.

- a) General management []
- b) Finance & Administration []
- c) Marketing and sales []
- d) Other (specify) _____

22) Your gender

Female [] Male []

23) Your age categories (Tick as applicable)

- a) Under 25 years []
- b) 25 – 35 years []
- c) 35 – 45 years []
- d) 45 – 55 years []
- e) Over 55 years []

24) Your Marital Status (tick as appropriate)

- a) Single [] b) Married []
- c) Other (specify) _____

25) What is your highest level of education?

- a) Secondary (form IV) [] b) Ordinary Diploma []
- d) Undergraduate Degree [] d) Postgraduate Degree []
- f) Other (specify) _____

26) Length of time that you have worked in the organization.

- a) Less than 1 year [] b) 1-2 years []
- c) 3-5 years [] d) 6-10 years []
- e) Over 10 years []

Section B – Marketing strategies pursued

27) What brand of vehicles does your organisation sell?

- a) Nissan [] b) Toyota []

Organizations tend to engage in different marketing activities to achieve their marketing objectives of increasing consumer awareness of their brands and to increase their market share. The marketing activities that the organisations usually pursue relate to the product (brand), pricing, promotion and distribution. Please indicate the extent to which your

companies use different marketing activities to achieve the objectives of increased awareness and also increased sales.

Please answer the following questions in relation to the main brand that your organisation sells.

11) To what extent does Toyota use the following media to increase awareness and sales of its brands?

Media usage	To Very Large extent	To Large extent	To Moderate extent	To Small extent	Not at all
Radio					
Television					
Newspapers					
Newsletters					
Magazines					
Word of Mouth					
Sales people					
Outdoor posters					
Other specify _____					

28) To what extent does Toyota use the following product strategies/ activities in ensuring that you increase the awareness and sales of the brands?

Product strategies	To Very Large extent	To Large extent	To Moderate extent	To Small extent	Not at all
The brand name of the vehicles is appealing					
The features of the vehicles are well differentiated from those of competitors					
The benefits of the vehicles offer a differential advantage compared with those of competitors					
The design of the vehicles is appealing.					
The vehicles are of high quality					
The vehicles offer reliable service					
The company offers good after-sales service					
The company offers effective on call service response to customers					
The maintenance costs of the vehicles are relatively low.					
The spare parts are easily available					
They have genuine spare parts					
The vehicles are durable					
Other specify					

29) To what extent does Toyota use the following pricing strategies/activities in ensuring that it increases the awareness and sales of its brands?

Pricing strategies	To Very Large extent	To Large extent	To Moderate extent	To Small extent	Not at all
The company charges a premium price for any unique features of their vehicle					
The company charges artificially low prices in order to gain market share					
The company keeps the cost of marketing and manufacture at a minimum level for its brands					
The company charges a high price because it has a competitive advantage.					
The company's pricing strategy is consistent with the benefits of brands that they offer.					
The pricing strategy that the company uses aims at making consumers to respond on an emotional, rather than rational basis.					
The company offers a promotional price that is used to promote the vehicles					

30) To what extent does the Company use the following promotional strategies /activities in ensuring that it increases the awareness and sales of its brands?

Promotional strategies	To Very Large extent	To Large extent	To Moderate extent	To Small extent	Not at all
The company advertises can easily be remembered.					
The company has a positive relationship with media organisations.					
The company offers good special offers/coupons in their sales promotion					
The company uses direct mail in sending publicity material.					

Promotional strategies	To Very Large extent	To Large extent	To Moderat e extent	To Small extent	Not at all
The company carries out effective communication campaign that comprises a well thought out message strategy.					
The company uses the right media channels in executing their messages					
The company uses effective personal selling.					
The company uses effective trade promotions					
The company uses effective advertising.					
The company uses effective consumer promotion strategies.					
The company has a high participates in exhibitions					
The company offers materials to customers that have corporate logos					
The company's involves itself in charitable activities.					
The company participates in sponsorships					
Other specify					

31) To what extent does the Company use the following **distribution activities** in ensuring that it increases the awareness and sales of its brands?

Distribution strategies	To Very Large extent	To Large extent	To Moderate extent	To Small extent	Not at all
The company distributes its product through market intermediaries(dealers)					
The company distributes its vehicles directly from the manufacturer to the consumer.					
The company uses exclusive distribution through a single outlet					
The company chooses a small number of retail outlets to distribute its vehicles.					

32) Please provide information about marketing strategies adopted by your organisation towards the Toyota brand in Kenya?

Thank you for taking time to complete this questionnaire

APPENDIX 4

AN EMPIRICAL INVESTIGATION OF MARKETING STRATEGIES APPLIED ON TOYOTA AND NISSAN BRANDS IN KENYA. QUESTIONNAIRE FOR CORPORATE CLIENTS

Instruction:

Please answer all the questions to the best of your knowledge. There are not right or wrong answers. Your beliefs, opinions, evaluations and behaviour are what is important. Once again be assured that your individual responses will not be revealed to a third party. They will only be used to compute percentages, proportions, and average scores.

Section A – Respondent profile

33) The name Company/Organization is (Optional) _____

34) Where it is registered/incorporated

- a) Local (Kenyan) []
- b) Foreign (Outside Kenya) []
- c) Other - specify _____

35) What is the nature of operation of your company (Tick all that apply)

- a) Manufacturing []
- b) Service Industry []
- c) Education []
- d) Finance and Banking []
- e) Other (Specify) _____

36) Which of the following best describes your position?

- a) Top Management []
- b) Middle Management []
- c) First level supervisory []
- d) Other (specify) []

37) Department in which you work.

- a) General management []
- b) Finance & Administration []
- c) Marketing and sales []
- d) Any other (specify) _____

38) Your gender

Female []

Male []

39) Your age categories (Tick as applicable)

a) Under 25 years []

b) 25 – 35 years []

c) 35 – 45 years []

d) 45 – 55 years []

e) Over 55years []

40) Your Marital Status (tick as appropriate)

a) Single []

b) Married []

c) Other (specify) _____

41) What is your highest level of education?

a) Secondary (form IV) [] b) Ordinary Diploma []

e) Undergraduate Degree [] d) Postgraduate Degree []

g) Other (specify) _____

42) Length of time that you have worked in the organization.

a) Less than 1year [] b) 1-2 years []

c) 3-5 years [] d) 6-10 years []

e) Over 10 years []

SECTION B – THE VEHICLES THAT YOUR ORGANISATION BUYS

43) What brands of vehicles that your organisations use among the following two?

a) Nissan [] b) Toyota [] c) Both Nissan and Toyota []

44) If your organisation uses both Nissan and Toyota, which brand of vehicles constitutes a relatively higher share than the other?

a) Nissan [] b) Toyota []

45) If your organisation has both (a) vehicle(s) in the last **one year**, what brand of vehicles did your company buy?

a) Nissan [] b) Toyota []

SECTION C – MARKETING STRATEGIES ADOPTED

Organizations tend to engage in different marketing activities to achieve their marketing objectives of increasing consumer awareness of their brands and to increase their market share. The marketing activities that the organisations usually pursue relate to the product (brand), pricing, promotion and distribution. Please indicate the extent Toyota and DT Dobie use different marketing activities to achieve the objectives of increased awareness and also increased sales.

Please answer the following questions in relation to the main brand (Toyota or Nissan) that your organisation buys.

11) To what extent does Toyota and DT Dobie use the following media to increase awareness and sales of its brands?

Media usage	Very Large extent		Large extent		Moderate extent		Small extent		Not at all	
	Toyota	DT Dobie	Toyot a	DT Dobie	Toyot a	DT Dobie	Toyot a	DT Dobie	Toyot a	DT Dobie
Radio										
Television										
Newspapers										
Newsletters										
Magazines										
Word of Mouth										
Sales people										
Outdoor posters										
Other specify										

46) To what extent does Toyota and DT Dobie use the following product strategies/ activities in ensuring that they increase the awareness and sales of the brands?

Product strategies	To Very Large extent		To Large extent		To Moderate extent		To Small extent		Not at all	
	Toyota	DT Dobie	Toyota	DT Dobie	Toyota	DT Dobie	Toyota	DT Dobie	Toyota	DT Dobie
The brand name of the vehicles is appealing										
The features of the vehicles are well differentiated from those of competitors										
The benefits of the vehicles offer a differential advantage compared with those of competitors										
The design of the vehicles is appealing .										
The vehicles are of high quality										
The vehicles offer reliable service										
The company offers good after-sales service										
The company offers effective on call service response to customers										
The maintenance costs of the vehicles are relatively low .										
The spare parts are easily available										
They have genuine spare parts										
The vehicles are durable										

47) To what extent does Toyota and DT Dobie use the following pricing strategies/activities in ensuring that it increases the awareness and sales of its brands?

Pricing strategies	Very Large extent		Large extent		Moderate extent		Small extent		Not at all	
	Toyota	DT Dobie	Toyota	DT Dobie	Toyota	DT Dobie	Toyota	DT Dobie	Toyota	DT Dobie
The company charges a premium price for any unique features of their vehicle										
The company charges artificially low prices in order to gain market share										
The company keeps the cost of marketing and manufacture at a minimum level for its brands										
The company charges a high price because it has a competitive advantage.										
The company's pricing strategy is consistent with the benefits of brands that they offer.										
The pricing strategy that the company uses aims at making consumers to respond on an emotional, rather than rational basis.										
The company offers a promotional price that is used to promote the vehicles										

48) To what extent does Toyota and DT Dobie use the following promotional strategies/activities in ensuring that it increases the awareness and sales of its brands?

Promotional strategies	Very Large extent		Large extent		Moderate extent		Small extent		Not at all	
	Toyota	DT Dobie	Toyota	DT Dobie	Toyota	DT Dobie	Toyota	DT Dobie	Toyota	DT Dobie
The company advertises can easily be remembered.										
The company has a positive relationship with media organisations.										
The company offers good special offers/coupons in their sales promotion										
The company uses direct mail in sending publicity material.										
The company carries out effective communication campaign that comprises a well thought out message strategy.										
The company uses the right media channels in executing their messages										
The company uses effective personal selling.										
The company uses effective trade promotions										
The company uses effective advertising.										
The company uses effective consumer promotion strategies.										
The company has a high participates in exhibitions										
The company offers materials to customers that have corporate logos										
The company's involves itself in charitable activities.										
The company participates in sponsorships										

49) To what extent does Toyota and DT Dobie use the following distribution activities in ensuring that it increases the awareness and sales of its brands?

Distribution strategies	Very Large extent		Large extent		Moderate extent		Small extent		Not at all	
	Toyota	DT Dobie	Toyota	DT Dobi e	Toyota	DT Dobie	Toyota	DT Dobie	Toyota	DT Dobie
a) The company distributes its product through market intermediaries(dealers)										
b) The company distributes its vehicles directly from the manufacturer to the consumer.										
c) The company uses exclusive distribution through a single outlet										
d) The company chooses a small number of retail outlets to distribute its vehicles.										

50) Please provide other information about marketing strategies adopted by DT Dobie and Toyota towards the Nissan or Toyota brand in Kenya?

Thank you for taking time to complete this questionnaire

APPENDIX 5: LIST OF CORPORATE COMPANIES

- A O BAYUSUF AND SONS LTD
- 2 A.K.ABDULGANI LTD
- 3 ABERCROMBIE & KENT
- 4 AGRO IRRIGATION & PUMP SERVICES LTD
- 5 AON MINET INSURANCE BROKERS
- 6 ATHI RIVER MINING LTD
- 7 BAMBURI CEMENT
- 8 BARCLAYS BANK
- 9 BATA SHOE COMPANY (K) LTD
- 10 BAYER EAST AFRICA LTD
- 11 BAYUSUF GRAIN MILLERS LTD
- 12 BIDCO OIL REFINERIES LTD
- 13 BM SECURITY SERVICES
- 14 BOC KENYA LTD
- 15 BRITISH AIRWAYS
- 16 BRITISH AMERICAN INSURANCE
- 17 BROOKEHOUSE SCHOOLS
- 18 BROOKSIDE DAIRY LTD
- 19 C.DORMAN LTD
- 20 CADBURY KENYA LIMITED
- 21 CAPITAL GROUP LTD
- 22 CELTEL KENYA LIMITED
- 23 CENTRAL BANK OF KENYA
- 24 CFC STANBIC BANK LTD
- 25 CHANIA FEEDS MANUFACTURES LTD
- 26 CHEMONICS INTERNATIONAL INC.
- 27 CHINA PETROLEUM PIPELINE LIMITED
- 28 CHINA ROAD AND BRIDGE CORPORAT
- 29 CHINA WU YI
- 30 CITIBANK N A
- 31 CO OPERATIVE BANK OF KENYA
- 32 COBRA SECURITY CO. LTD
- 33 COCA-COLA AFRICA LTD.
- 34 COLGATE PAMOLIVE (E.A) LTD
- 35 COMBROK LTD
- 36 COMMERCIAL BANK OF AFRICA LTD
- 37 CONVENTIONAL CARGO CONVEYORS L
- 38 COOPER KENYA LTD

- 39 CORN PRODUCTS INTERNATIONAL
- 40 CORPORATE SECURITY SERVICES
- 41 CROWN BERGER (K) LTD
- 42 CROWN DISTRIBUTORS LTD
- 43 DAVIS & SHIRTLIFF LTD
- 44 DHL WORLDWIDE EXPRESS
- 45 E A PACKAGING INDUSTRIES LTD
- 46 EABS BANK
- 47 EAST AFRICA SEA FOOD LTD
- 48 EASTERN PRODUCE KENYA LTD
- 49 ENKE MANAGEMENT LTD
- 50 EVEREADY BATTERIES (K) LTD.
- 51 EXPORT PROCESSING ZONE AUTHORITY
- 52 EXPRESS TRAVEL
- 53 FARMER'S CHOICE
- 54 FIRESTONE EAST AFRICA
- 55 FREIGHT FORWARDERS K LTD
- 56 G4S SECURITY SERVICES (K) LTD
- 57 GEOPOINTER PROJECT CO LTD
- 58 GILAT ALLDEAN (AFRICA) LTD
- 59 GLAXOSMITHKLINE LTD
- 60 H YOUNG AND COMPANY E A LTD
- 61 HABIB BANK A G ZURICH
- 62 HACO INDUSTRIES LTD
- 63 HENKEL CHEMICALS LTD
- 64 HERITAGE ALL INSURANCE LTD
- 65 HOMEGROWN (K) LTD.
- 66 HOWARD SAUNDERS SAFARIS
- 67 HURLINGHAM BUTCHERY LTD
- 68 IBERA AFRICA LTD
- 69 JOHNSON DIVERSEY (EA) LTD
- 70 JOHNSON DIVERSEY EAST AFRICA LTD
- 71 JOMMO KENYATTA FOUNDATION
- 72 K.B.SANGHANI & SONS
- 73 KAPA OIL REFINERIES
- 74 KAVEE QUARRIES LTD
- 75 KAY CONSTRUCTION
- 76 KENFREIGHT (E.A) LTD
- 77 KENYA AEROTECH LTD.
- 78 KENYA AIRWAYS LTD
- 79 KENYA BROADCASTING CORPORATION

- 80 KENYA BUILDERS AND CONCRETE COMPANY LTD
- 81 KENYA BUS SERVICES
- 82 KENYA COMMERCIAL BANK LTD.
- 83 KENYA INDUSTRIAL & ALLIED SAFETY SERVICES LTD
- 84 KENYA NATIONAL ASSURANCE 2001 LTD
- 85 KENYA NUT COMPANY LTD
- 86 KENYA PIPELINE COMPANY LTD
- 87 KENYA POWER & LIGHTING
- 88 KENYA SEED COMPANT LTD
- 89 KENYA SHELL LTD
- 90 KENYA TEA PACKERS LIMITED
- 91 KENYA WINE AGENCIES LTD
- 92 KEROCHE INDUSTRIES
- 93 KETEPA TEA PACKERS LTD
- 94 KODAK KENYA LTD
- 95 KUEHNE + NAGEL LTD.
- 96 KWACHA GROUP OF COMPANIES
- 97 LINKSOFT COMMUNICATIONS
- 98 LION OF KENYA INSUARANCE COMPANY LTD
- 99 M A BAYUSUF & SONS LTD
- 100 MABATI ROLLING MILLS LTD
- 101 MAERSK KENYA LIMITED
- 102 MAERSK LOGISTICS LTD
- 103 MANSON HART (K) LTD
- 104 MASTERMIND TOBACCO (K) LTD
- 105 MITCHELL COTTS FREIGHT KENYA LTD.
- 106 MOMBASA MAIZE MILLERS
- 107 MULTI-CHOICE KENYA
- 108 MULTIPLE HAULIERS [EA] LTD
- 109 N K BROTHERS LTD
- 110 NAS AIRPORT SERVICES
- 111 NATION MEDIA GROUP LTD
- 112 NATIONAL BANK OF KENYA LTD
- 113 NESTLE FOODS KENYA LTD
- 114 NORBROOK KENYA
- 115 OCEANFREIGHT E A LTD
- 116 OSERIAN FLOWERS LTD
- 117 OXFORD UNIVERSITY PRESS
- 118 PAWS AFRICA SAFARIS
- 119 PIRELLI TYRES LIMITED
- 120 POLLMANS TOURS AND SAFARIS

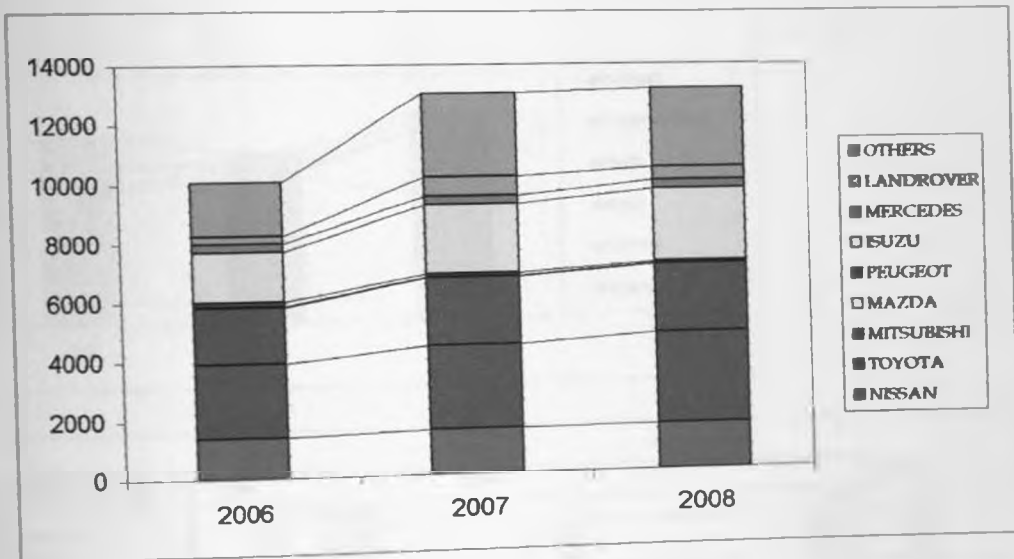
- 121 PRIVATE SAFARIS (E.A) LTD
- 122 PTA REINSURANCE COMPANY
- 123 PUT SARAJEVO ENGINEERING LTD
- 124 PZ CUSSONS EAST AFRICA LTD
- 125 RAMCO PRINTING WORKS LTD
- 126 RECKITT BENKISER E A LTD
- 127 ROYAL MEDIA SERVICES LTD
- 128 SADOLIN PAINTS (E.A) LTD
- 129 SAFARICOM KENYA LTD
- 130 SAMEER AFRICA
- 131 SARA LEE HOUSEHOLD AND BODY CARE
- 132 SBI INTERNATIONAL HOLDINGS
- 133 SDV TRANSAMI
- 134 SECUREX AGENCIES LTD
- 135 SECURICOR SECURITY SERVICES LTD
- 136 SHREEJI ENTERPRISES LTD
- 137 SIEMENS LTD
- 138 SINOE CONSTRUCTION LTD
- 139 SPENCON KENYA LTD
- 140 SPIN KNIT DAIRY LTD
- 141 STANDARD CHARTERED BANK
- 142 STANDARD NEWSPAPERS
- 143 SYNGENTA EAST AFRICA LIMITED
- 144 TETRA PAK CONVERTERS LTD.
- 145 TEXT BOOK WORLD LTD
- 146 THE STANDARD LTD
- 147 THE WRIGLEY CO (E.A.) LTD
- 148 TIMSALES LTD
- 149 TOTAL KENYA LIMITED
- 150 UCHUMI SUPERMARKETS LTD
- 151 UNILEVER KENYA LTD
- 152 UNITED MILLERS LTD
- 153 UNIVERSITY OF NAIROBI ENTERPRISES AND SERVICES LTD
- 154 VITAFOAM PRODUCTS LTD
- 155 WELLS FARGO LTD

APPENDIX 6: THREE YEAR STATISTICAL ANALYSIS FOR UPTO DECEMBER

1. CURRENT MARKET SIZE (UPTO DECEMBER)

SALES COMPARISON UP TO DECEMBER

	2006		2007		2008	
NISSAN	1392	13.8%	1536	11.8%	1570	12.0%
TOYOTA	2506	24.9%	2872	22.1%	3152	24.0%
MITSUBISHI	1922	19.1%	2326	17.9%	2358	18.0%
MAZDA	24	0.2%	26	0.2%	42	0.3%
PEUGEOT	164	1.6%	109	0.8%	29	0.2%
ISUZU	1680	16.7%	2355	18.1%	2512	19.1%
MERCEDES	285	2.8%	267	2.1%	315	2.4%
LANDROVER	258	2.6%	661	5.1%	434	3.3%
OTHERS	1819	18.1%	2863	22.0%	2722	20.7%
TOTAL	10051	100.0%	13015	100.0%	13135	100.0%

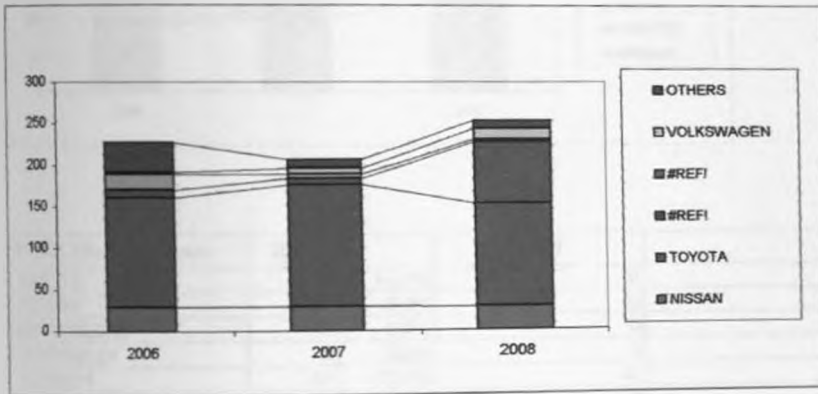


PASSENGER VEHICLES

BREAKDOWN BY SEGMENT

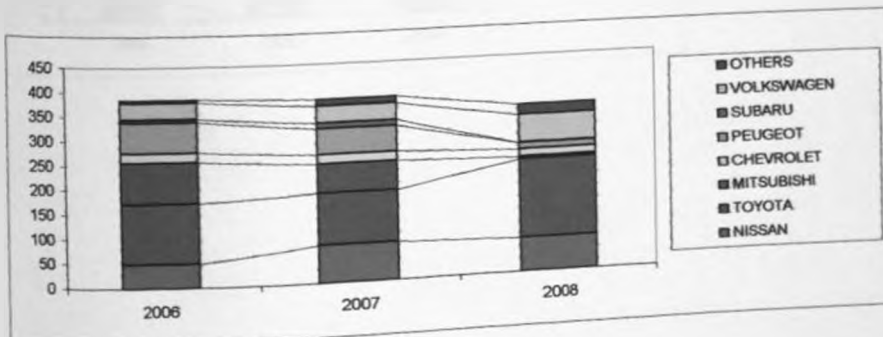
P/CAR (1300-1500cc)	2006		2007		2008	
NISSAN	29	12.9%	29	14.0%	28	11.1%
TOYOTA	132	58.7%	147	71.0%	125	49.4%
MITSUBISHI	9	4.0%	8	3.9%	74	29.2%
PEUGEOT	18	8.0%	5	2.4%	3	1.2%
VOLKSWAGEN	1	0.4%	7	3.4%	13	5.1%
OTHERS	36	16.0%	11	5.3%	10	4.0%
TOTAL	225	100.0%	207	100.0%	253	100.0%

2007	2008	%Change
207	253	22%

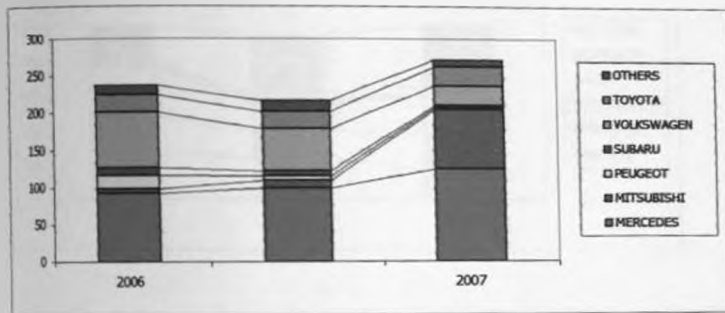


P/CAR (1501-1800cc)	2006		2007		2008	
NISSAN	49	12.8%	77	20.4%	70	20.2%
TOYOTA	123	32.0%	108	28.6%	163	47.0%
MITSUBISHI	84	21.9%	60	15.9%	5	1.4%
CHEVROLET	20	5.2%	19	5.0%	16	4.6%
PEUGEOT	62	16.1%	53	14.0%	13	3.7%
SUBARU	6	1.6%	11	2.9%	0	0.0%
VOLKSWAGEN	34	8.9%	36	9.5%	57	16.4%
OTHERS	6	1.6%	14	3.7%	23	6.6%
TOTAL	384	100.0%	378	100.0%	347	100.0%

2007	2008	%Change
378	347	-8%



P/CAR (>1801cc)	2006		2007		2008	
MERCEDES	92	38.8%	99	45.6%	125	46.0%
MITSUBISHI	6	2.5%	10	4.6%	80	29.4%
PEUGEOT	18	7.6%	8	2.8%	2	0.7%
SUBARU	10	4.2%	7	3.2%	3	1.1%
VOLKSWAGEN	75	31.6%	57	26.3%	26	9.8%
TOYOTA	23	9.7%	23	10.6%	26	9.6%
OTHERS	13	5.5%	15	6.9%	10	3.7%
TOTAL	237	100.0%	217	100.0%	272	100.0%
				2007	2008	%Change
				217	272	25%

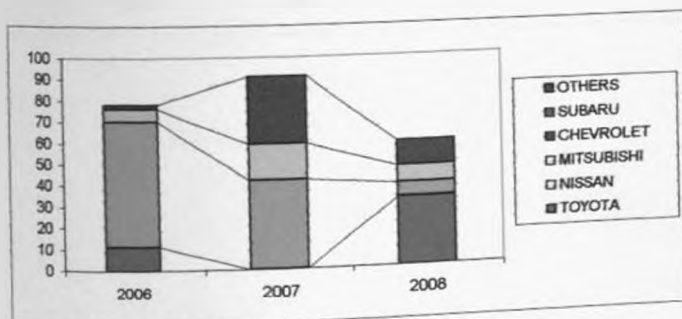


P/CAR Station wagons	2006		2007		2008	
TOYOTA	11	14.1%	0	0.0%	32	54.2%
NISSAN	0	0.0%	0	0.0%	0	0.0%
MITSUBISHI	0	0.0%	0	0.0%	0	0.0%
CHEVROLET	0	0.0%	0	0.0%	0	0.0%
PEUGEOT	59	75.6%	42	46.2%	7	11.9%
SUBARU	0	0.0%	0	0.0%	0	0.0%
VOLKSWAGEN	6	7.7%	17	18.7%	8	13.8%
OTHERS	2	2.6%	32	35.2%	12	20.3%
TOTAL	78	100.0%	91	100.0%	59	100.0%

<Station Wagons - Estates>

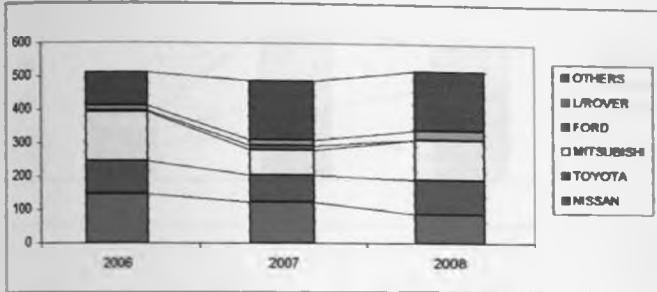
4x2

2007	2008	%Change
91	59	-35%



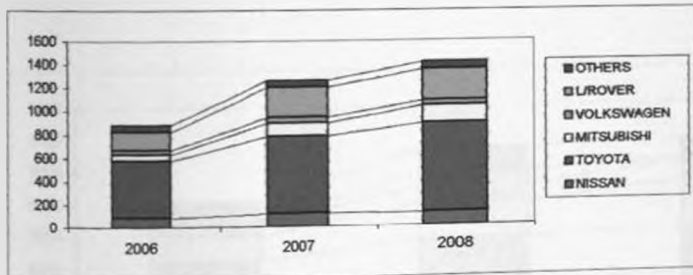
4WD SW (P)	2006		2007		2008	
NISSAN	147	28.8%	123	25.3%	87	16.6%
TOYOTA	98	19.2%	81	16.6%	103	19.8%
MITSUBISHI	147	28.8%	75	15.4%	122	23.5%
FORD	4	0.8%	14	2.9%	0	0.0%
L/ROVER	15	2.9%	16	3.3%	28	5.4%
OTHERS	100	19.6%	178	36.6%	179	34.5%
TOTAL	511	100.0%	487	100.0%	519	100.0%

2007	2008	%Change
487	519	7%



4WD SW (D)	2006		2007		2008	
NISSAN	87	9.9%	120	9.5%	111	7.9%
TOYOTA	489	55.4%	661	52.3%	774	54.7%
MITSUBISHI	55	6.2%	113	8.9%	147	10.4%
VOLKSWAGEN	37	4.2%	51	4.0%	46	3.3%
L/ROVER	155	17.6%	258	20.4%	268	19.0%
OTHERS	59	6.7%	60	4.8%	68	4.8%
TOTAL	882	100.0%	1263	100.0%	1414	100.0%

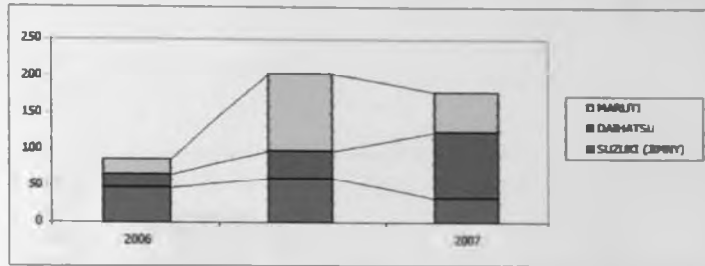
2007	2008	%Change
1263	1414	12%



AND SUV <1300cc	2006		2007		2008	
SUZUKI (JIMNY)	47	54.0%	60	28.6%	33	18.5%
DAIHATSU	19	21.6%	38	18.7%	91	51.1%
MARUTI	21	24.1%	105	51.7%	54	30.3%
OTHERS	0	0.0%	0	0.0%	0	0.0%
TOTAL	87	100.0%	203	100.0%	178	100.0%

<Small 4x4 Station Wagons Less than 1300cc>

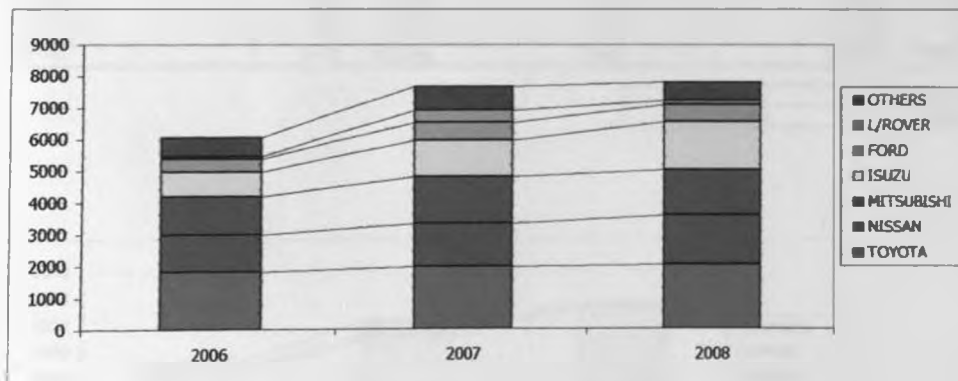
2007	2008	%Change
203	178	-12%



COMMERCIAL VEHICLES

CV TOTAL	2006		2007		2008	
TOYOTA	1811	29.9%	1977	25.7%	2034	28.0%
NISSAN	1164	19.2%	1361	17.6%	1560	19.9%
MITSUBISHI	1220	20.1%	1478	19.2%	1433	18.3%
ISUZU	782	12.9%	1157	15.1%	1513	19.4%
FORD	302	4.5%	574	7.5%	540	7.0%
L/ROVER	94	1.6%	387	5.0%	138	1.8%
OTHERS	600	9.9%	783	9.9%	580	7.5%
TOTAL	6083	100.0%	7685	100.0%	7812	100.0%

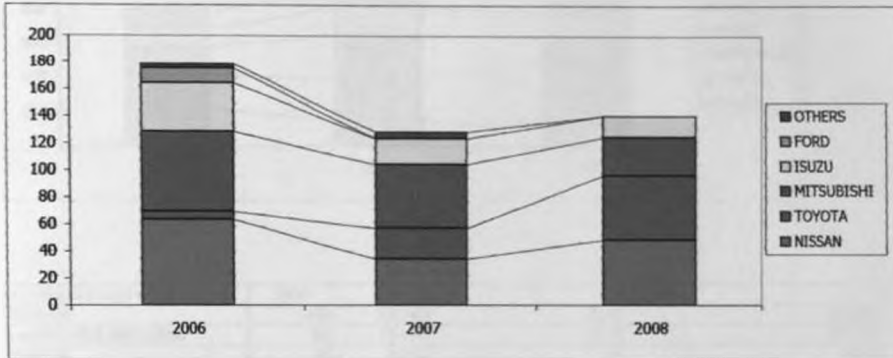
2007	2008	%Change
7685	7812	2%



BREAKDOWN BY SEGMENT

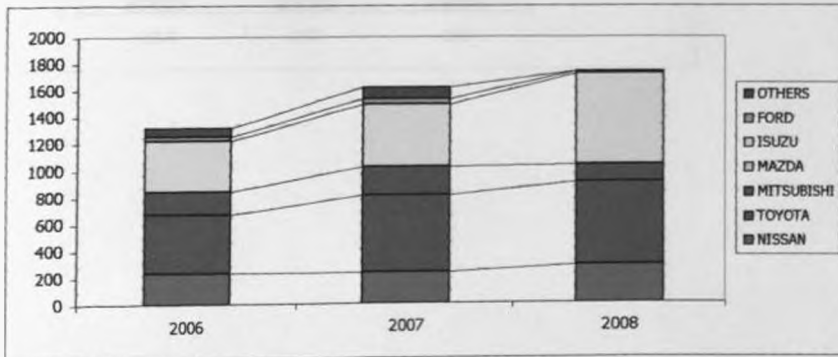
1 TON P/U/P (P) 4X2	2006		2007		2008	
NISSAN	63	35.4%	34	28.0%	48	34.3%
TOYOTA	6	3.4%	23	18.0%	48	34.3%
mitsubishi	50	33.1%	47	38.7%	28	20.0%
ISUZU	36	20.2%	18	14.6%	18	11.4%
FORD	11	6.2%	0	0.0%	0	0.0%
OTHERS	3	1.7%	5	3.9%	0	0.0%
TOTAL	178	100.0%	128	100.0%	140	100.0%

2007	2006	%Change
128	140	9%



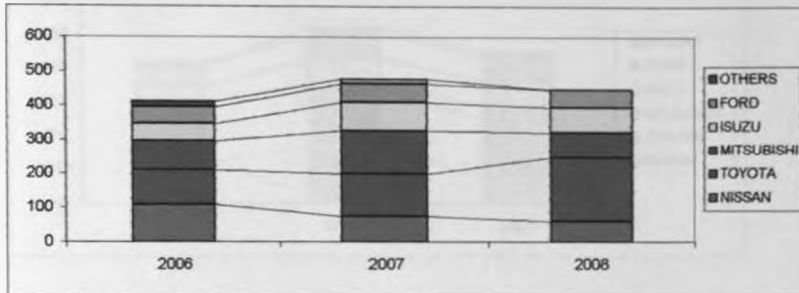
1 TON P/U/P (D) 4X2	2006		2007		2008	
NISSAN	230	17.5%	232	14.3%	282	16.2%
TOYOTA	438	33.2%	575	35.5%	621	35.8%
MITSUBISHI	173	13.1%	212	13.1%	132	7.6%
MAZDA	0	0.0%	0	0.0%	0	0.0%
ISUZU	379	28.8%	472	29.2%	687	39.4%
FORD	34	2.6%	38	2.4%	20	1.1%
OTHERS	64	4.9%	68	5.4%	0	0.0%
TOTAL	1318	100.0%	1618	100.0%	1742	100.0%

2007	2006	%Change
1618	1742	8%



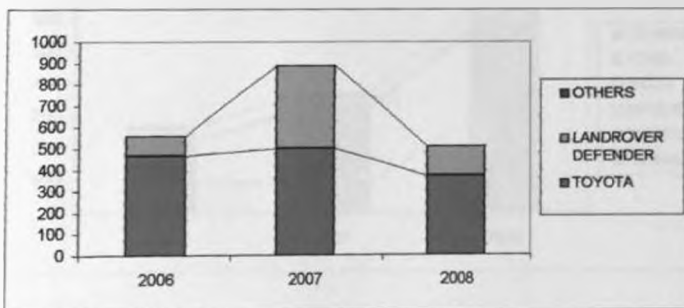
1 TON PUP 4X4	2006		2007		2008	
	NISSAN	108	26.2%	74	15.6%	59
TOYOTA	100	24.3%	124	25.9%	167	41.8%
MITSUBISHI	88	21.4%	128	27.0%	78	17.0%
ISUZU	50	12.1%	83	17.4%	73	16.3%
FORD	50	12.1%	53	11.1%	52	11.8%
OTHERS	16	3.9%	15	3.1%	0	0.0%
TOTAL	412	100.0%	478	100.0%	447	100.0%

2007	2008	%Change
478	447	-6%



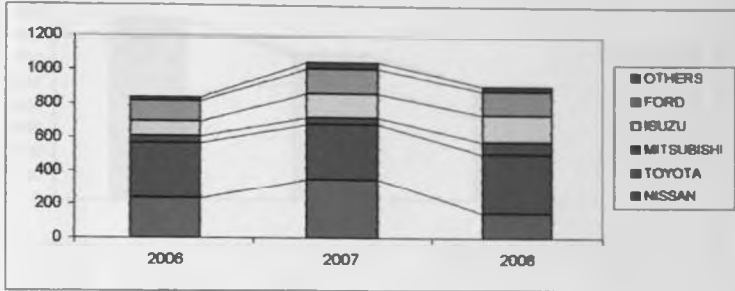
1 TON 4X4 HDUTY	2006		2007		2008	
	TOYOTA	495	83.2%	501	55.9%	370
LANDROVER DEFENDER	94	16.8%	367	43.1%	136	26.7%
NISSAN	0	0.0%	8	1.0%	6	1.0%
OTHERS	0	0.0%	0	0.0%	0	0.0%
TOTAL	550	100.0%	897	100.0%	516	100.0%

2007	2008	%Change
897	516	-42%



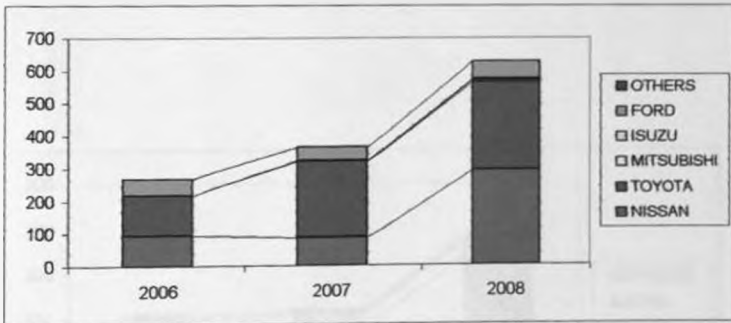
D/CAR Basic	2006		2007		2008	
	Units	%	Units	%	Units	%
NISSAN	225	27.8%	349	33.4%	148	18.1%
TOYOTA	335	40.2%	330	31.6%	357	39.4%
MITSUBISHI	40	4.8%	35	3.7%	73	8.0%
ISUZU	87	10.4%	142	13.6%	158	17.5%
FORD	118	14.1%	147	14.1%	145	16.0%
OTHERS	22	2.6%	38	3.6%	27	3.0%
TOTAL	834	100.0%	1045	100.0%	807	100.0%

2007	2008	%Change
1045	807	-13%



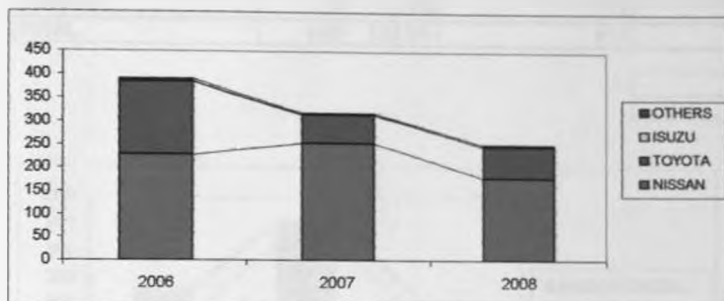
D/CAR DELUXE	2006		2007		2008	
	Units	%	Units	%	Units	%
NISSAN	93	34.7%	85	23.4%	292	46.6%
TOYOTA	123	45.9%	236	64.8%	272	43.4%
MITSUBISHI	0	0.0%	0	0.0%	7	1.1%
ISUZU	1	0.4%	1	0.3%	2	0.3%
FORD	51	19.0%	42	11.5%	54	8.6%
OTHERS	0	0.0%	0	0.0%	0	0.0%
TOTAL	288	100.0%	364	100.0%	627	100.0%

2007	2008	%Change
364	627	72%



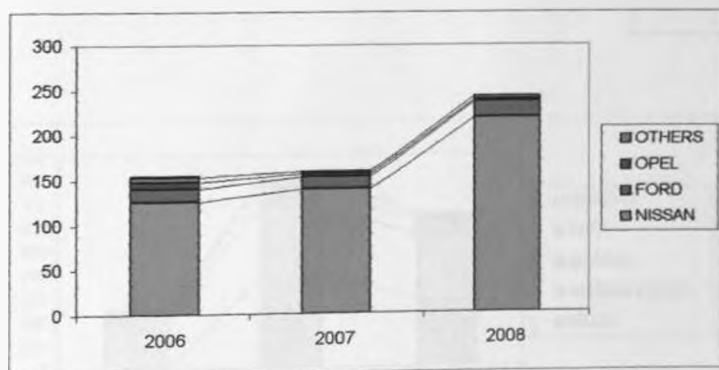
MINI BUSES	2006		2007		2008	
	NISSAN	228	58.5%	253	78.8%	170
TOYOTA	156	40.0%	61	19.2%	66	27.1%
ISUZU	1	0.3%	1	0.3%	0	0.0%
OTHERS	5	1.3%	3	0.9%	4	1.6%
TOTAL	390	100.0%	318	100.0%	251	100.0%

2007	2008	%Change
318	251	21%



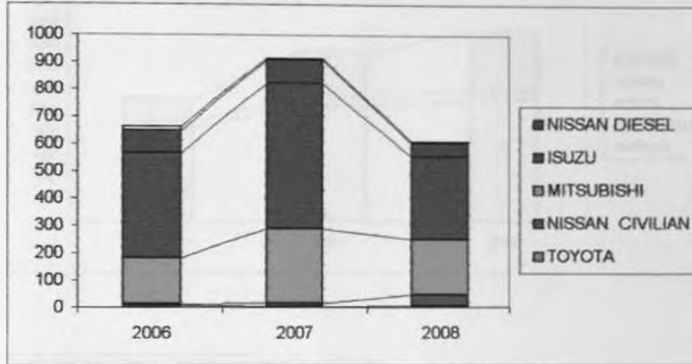
1/2T-Half Tonner	2006		2007		2008	
	NISSAN	125	81.7%	139	81.8%	218
TOYOTA	0	0.0%	0	0.0%	0	0.0%
FORD	15	9.8%	14	8.2%	18	5.4%
OPEL	7	4.6%	3	1.8%	2	0.6%
TATA	0	0.0%	11	6.5%	89	28.9%
OTHERS	6	3.9%	3	1.8%	4	1.2%
TOTAL	153	100.0%	170	100.0%	331	100.0%

2007	2008	%Change
170	331	95%



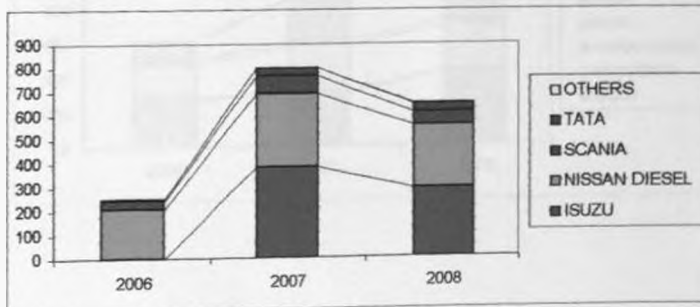
Medium Buses	2006		2007		2008	
TOYOTA	7	1.1%	2	0.2%	4	0.7%
NISSAN CIVILIAN	4	0.6%	12	1.3%	42	6.9%
MITSUBISHI	170	25.6%	273	29.8%	204	33.3%
ISUZU	384	57.9%	534	58.2%	302	49.3%
NISSAN DIESEL	82	12.4%	87	9.5%	49	8.0%
TATA	15	2.3%	7	0.8%	7	1.1%
OTHERS	1	0.2%	2	0.2%	5	0.8%
TOTAL	663	100.0%	917	100.0%	613	100.0%

2006	2007	%Change
917	613	-33%



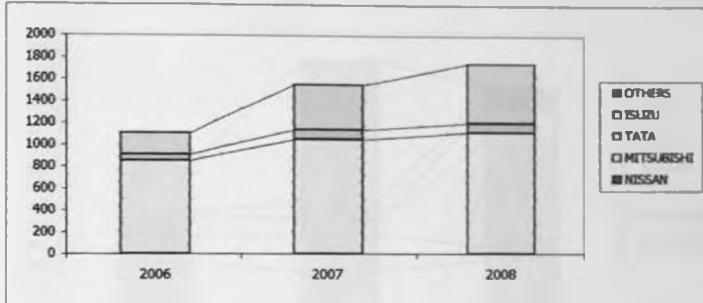
Large Buses	2006		2007		2008	
ISUZU	277	52.7%	380	47.8%	288	44.5%
NISSAN DIESEL	207	39.4%	309	38.7%	288	41.1%
SCANIA	36	6.8%	77	9.6%	54	8.3%
TATA	6	1.1%	32	4.0%	37	5.7%
OTHERS	0	0.0%	0	0.0%	2	0.3%
TOTAL	526	100.0%	798	100.0%	647	100.0%

2006	2007	%Change
798	647	-19%



LIGHT TRUCKS	2006		2007		2008	
	NISSAN	0	0.0%	0	0.0%	0
MITSUBISHI	852	72.3%	1047	83.5%	1117	59.7%
TATA	55	4.7%	91	5.5%	83	4.4%
ISUZU	198	16.8%	413	25.1%	545	29.1%
NISSAN DIESEL	54	4.6%	81	4.9%	104	5.6%
MAZDA	19	1.6%	16	1.0%	23	1.2%
OTHERS	0	0.0%	0	0.0%	0	0.0%
TOTAL	1178	100.0%	1648	100.0%	1872	100.0%

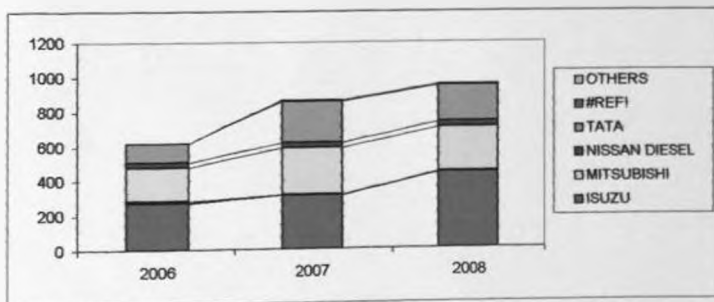
2006	2007	%Change
1648	1872	14%



OTHER TRUCKS -MEDIUM, BIG & HEAVY

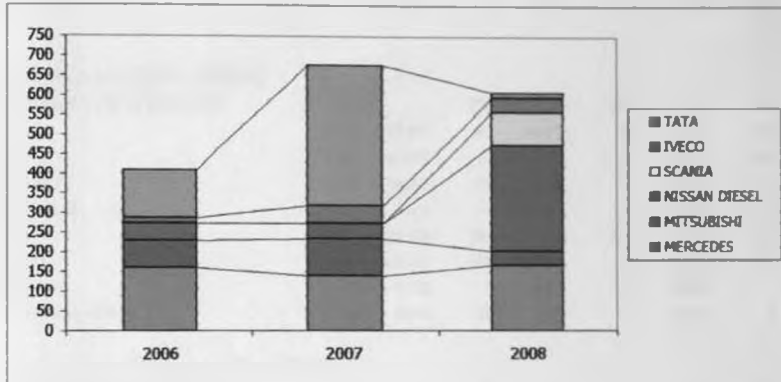
	2006		2007		2008	
	ISUZU	267	43.3%	310	35.9%	440
IVECO	6	1.0%	2	0.2%	3	0.3%
MERCEDES	8	1.3%	2	0.2%	0	0.0%
MITSUBISHI	194	31.5%	275	31.8%	259	27.2%
NISSAN DIESEL	31	5.0%	27	3.1%	33	3.5%
TATA	110	17.9%	240	27.8%	210	22.0%
OTHERS	0	0.0%	8	0.9%	8	0.8%
TOTAL	616	100.0%	864	100.0%	953	100.0%

2006	2007	%Change
864	953	10%



PRIME MOVERS	2006		2007		2008	
MERCEDES	159	25.8%	139	16.1%	166	17.4%
NISSAN DIESEL	44	7.1%	38	4.4%	271	28.4%
mitsubishi	88	11.2%	95	11.0%	38	3.8%
SCANIA	0	0.0%	0	0.0%	84	8.8%
IVECO	15	2.4%	48	5.3%	38	3.8%
TATA	121	19.8%	359	41.6%	14	1.5%
TOTAL	406	100.0%	677	100.0%	607	100.0%

2006	2007	%Change
677	607	-10%



**APPENDIX 6:KENYAN MOTOR INDUSTRY REPORT
CLASS BY CLASS ANALYSIS
2004 - 2008**

	<u>Yr 2004</u>		<u>Yr 2005</u>		<u>Yr 2006</u>		<u>Yr 2007</u>		<u>Yr 2008</u>	
1200 cc Saloons and St. Wagons										
Total number of units sold	167		154		144		247		176	
Maruti	165	98.8%	154	100.0%	144	100.0%	247	100.0%	174	98.9%
Hyundai	2	1.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Toyota Yaris	0	0.0%	0	0.0%	0	0.0%	0	0.0%	2	1.1%
Medium Saloons (1200 - 1800cc)										
Total number of units sold	971		716		609		585		600	
Peugeot	124	12.8%	103	14.4%	80	13.1%	58	9.9%	16	2.7%
Nissan	133	13.7%	97	13.5%	78	12.8%	106	18.1%	98	16.3%
Mistubishi	138	14.2%	88	12.3%	93	15.3%	68	11.6%	79	13.2%
Volkswagen	91	9.4%	78	10.9%	35	5.7%	42	7.2%	70	11.7%
Toyota	290	29.9%	198	27.7%	255	41.9%	255	43.6%	288	48.0%
Chevrolet	120	12.4%	102	14.2%	37	6.1%	24	4.1%	25	4.2%
Renault	0	0.0%	0	0.0%	0	0.0%	1	0.2%	12	2.0%
DaimlerChrysler	0	0.0%	10	1.4%	12	2.0%	4	0.7%	1	0.2%
Medium Station Wagons (1200 - 1800cc)										
Total number of units sold	77		99		77		242		212	
Peugeot	31	40.3%	41	41.4%	36	46.8%	15	6.2%	2	0.9%
Mitsubishi	0	0.0%	10	10.1%	3	3.9%	0	0.0%	0	0.0%
Toyota	9	11.7%	16	16.2%	11	14.3%	0	0.0%	32	15.1%
Daihatsu		0.0%	0	0.0%	0	0.0%	55	22.7%	91	42.9%
Large Saloon (> 1800cc)										
Total number of units sold	209		182		237		217		272	
DaimlerChrysler	107	51.2%	84	46.2%	92	38.8%	106	48.8%	135	49.6%
BMW	14	6.7%	9	4.9%	13	5.5%	7	3.2%	0	0.0%
Peugeot	5	2.4%	14	7.7%	18	7.6%	6	2.8%	2	0.7%
Mitsubishi	21	10.0%	21	11.5%	6	2.5%	10	4.6%	80	29.4%
Toyota Avensis & Camry	32	15.3%	22	12.1%	23	9.7%	23	10.6%	26	9.6%
VW Passat	0	0.0%	5	2.7%	75	31.6%	57	26.3%	26	9.6%
Large Station Wagon (>1800cc)										
Total number of units sold	119		85		77		179		230	
Peugeot (Partner)	50	42.0%	25	29.4%	23	29.9%	27	15.1%	5	2.2%
Toyota Condor & Rav 4	26	21.8%	0	0.0%	0	0.0%	0	0.0%	28	12.2%
Mitsubishi	0	0.0%	0	0.0%	0	0.0%	0	0.0%	34	14.8%
Renault	0	0.0%	0	0.0%	0	0.0%	12	6.7%	12	5.2%
Subaru	37	31.1%	60	70.6%	39	50.6%	55	30.7%	40	17.4%

	Yr 2004		Yr 2005		Yr 2006		Yr 2007		Yr 2008	
4WD Estate										
Total number of units sold	1333		1365		1404		1623		1728	
Land Rover	171	12.8%	190	13.9%	165	11.8%	274	16.9%	296	17.1%
Toyota	438	32.9%	593	43.4%	587	41.8%	742	45.7%	849	49.1%
Mitsubishi	237	17.8%	168	12.3%	198	14.1%	188	11.6%	235	13.6%
Nissan	176	13.2%	243	17.8%	234	16.7%	243	15.0%	198	11.5%
DaimlerChrysler	27	2.0%	27	2.0%	29	2.1%	45	2.8%	36	2.1%
VW Tourage	13	1.0%	22	1.6%	33	2.4%	51	3.1%	39	2.3%
Half Tonner										
Total number of units sold	384		216		153		170		331	
Nissan	262	68.2%	167	77.3%	125	81.7%	139	81.8%	218	65.9%
Mazda/ Ford	45	11.7%	31	14.4%	15	9.8%	14	8.2%	18	5.4%
Opel	70	18.2%	15	6.9%	7	4.6%	3	1.8%	2	0.6%
One Tonners										
Total number of units sold	1685		1901		1908		2224		2427	
Toyota	694	41.2%	717	35.4%	544	27.2%	722	32.3%	856	35.3%
Mitsubishi	330	19.6%	260	12.8%	325	16.2%	388	17.4%	236	9.7%
Isuzu	265	15.7%	335	16.6%	465	23.2%	574	25.7%	776	32.0%
Nissan	272	16.1%	350	17.3%	398	19.9%	340	15.6%	389	45.4%
Heavy Duty Pick-ups										
Total number of units sold	589		499		559		897		516	
Toyota HZJ	508	86%	376	75%	465	83%	501	56%	370	71.7%
LandRoverDefender 110TDI	81	14%	123	25%	94	17%	387	43%	138	26.7%
Nissan	0	0%	0	0%	0	0%	9	1%	8	1.6%
Double Cabs										
Total number of units sold	774		987		1102		1409		1534	
Toyota	426	55.0%	440	44.6%	458	41.6%	566	40.2%	629	41.0%
Mitsubishi	31	4.0%	50	5.1%	40	3.6%	39	2.8%	80	5.2%
Isuzu	15	1.9%	57	5.8%	88	8.0%	143	10.1%	161	10.5%
Nissan	233	30.1%	310	31.4%	325	29.5%	434	30.8%	438	28.6%
Two to Three Ton Pick-ups										
Total number of units sold	0		0%		0		0%		166	
Foton - S/Cab and D/Cab	0	0%	0	0%	0	0%	0	0.0%	91	54.8%
Greatwall - S/Cab and D/ Cab	0	0%	0	0%	0	0%	0	0.0%	75	45.2%
Minibuses <20 Seaters										
Total number of units sold	286		415		390		318		251	
Nissan	150	52.4%	234	56.4%	228	58.5%	253	79.6%	179	71.3%
Toyota	109	38.1%	175	42.2%	156	40.0%	53	16.7%	68	27.1%
Isuzu	9	3.1%	4	1.0%	5	1.3%	1	0.3%	0	0.0%
Mercedes Sprinter	0	0.0%	0	0.0%	0	0.0%	3	0.9%	4	1.6%
Mitsubishi	1	0.3%	2	0.5%	1	0.3%	0	0.0%	0	0.0%

SUB TOTAL - DTD Kenya applicable market

	Yr 2004		Yr 2005		Yr 2006		Yr 2007		Yr 2008	
Total number of units sold	6594		6619		6660		8111		8443	
Nissan	1226	18.6%	1401	21.2%	1388	20.8%	1524	22.9%	1528	18.1%
DaimlerChrysler	134	2.0%	121	1.8%	133	2.0%	158	2.4%	176	2.1%
Renault	0	0.0%	0	0.0%	0	0.0%	13	0.2%	24	0.3%
D.T Dobie	1360	20.6%	1522	23.0%	1521	22.8%	1695	25.5%	1728	20.5%
Toyota	2532	38.4%	2537	38.3%	2499	37.5%	2862	43.0%	3148	37.3%
Mitsubishi	758	11.5%	599	9.0%	666	10.0%	693	10.4%	744	8.8%
Isuzu	302	4.6%	418	6.3%	591	8.9%	769	11.5%	937	11.1%

Medium Buses	Yr 2004		Yr 2005		Yr 2006		Yr 2007		Yr 2008	
Total number of units sold	1197		683		663		917		613	
Mitsubishi	277	23.1%	149	21.8%	170	25.6%	273	29.8%	204	33.3%
Isuzu	844	70.5%	355	52.0%	384	57.9%	534	58.2%	302	49.3%
Nissan Diesel	57	4.8%	159	23.3%	82	12.4%	87	9.5%	49	8.0%
Nissan Civillian	5	0.4%	3	0.4%	4	0.6%	12	1.3%	42	6.9%
Mercedes MCV Bus	0	0.0%	0	0.0%	0	0.0%	2	0.2%	3	0.5%
Toyota	3	0.3%	3	0.4%	7	1.1%	2	0.2%	4	0.7%

Large Buses	Yr 2004		Yr 2005		Yr 2006		Yr 2007		Yr 2008	
Total number of units sold	244		179		526		798		647	
Isuzu	47	19.3%	49	27.4%	277	52.7%	380	47.6%	288	44.5%
Scania	19	7.8%	22	12.3%	36	6.8%	77	9.6%	54	8.3%
Nissan Diesel	177	72.5%	94	52.5%	207	39.4%	309	38.7%	266	41.1%

Light Trucks 3.5 - 9T	Yr 2004		Yr 2005		Yr 2006		Yr 2007		Yr 2008	
Total number of units sold	1329		1243		1178		1648		1872	
Mitsubishi	640	48.2%	748	60.2%	852	72.3%	1047	63.5%	1117	59.7%
Isuzu	474	35.7%	359	28.9%	198	16.8%	413	25.1%	545	29.1%

Medium Trucks 10 -14T	Yr 2004		Yr 2005		Yr 2006		Yr 2007		Yr 2008	
Total number of units sold	105		166		227		218		246	
Isuzu	63	60.0%	112	67.5%	126	55.5%	117	53.7%	167	67.9%
Mitsubishi	14	13.3%	40	24.1%	98	43.2%	98	45.0%	76	30.9%
Nissan Diesel	24	22.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Mercedes 1017	4	3.8%	1	0.6%	3	1.3%	2	0.9%	0	0.0%

Big Trucks 15 - 19T	Yr 2004		Yr 2005		Yr 2006		Yr 2007		Yr 2008	
Total number of units sold	102		180		118		143		169	
Isuzu	49	48.0%	70	38.9%	48	40.7%	61	42.7%	83	49.1%
TATA	25	24.5%	44	24.4%	16	13.6%	23	16.1%	17	10.1%
Mitsubishi	23	22.5%	45	25.0%	3	2.5%	41	28.7%	49	29.0%
Mercedes 1523	5	4.9%	1	0.6%	27	22.9%	0	0.0%	0	0.0%

Heavy Trucks >20T	Yr 2004		Yr 2005		Yr 2006		Yr 2007		Yr 2008	
Total number of units sold	251		254		271		503		538	
Isuzu	89	35.5%	91	35.8%	93	34.3%	132	26.2%	190	35.3%
Mitsubishi-Fuso	89	35.5%	99	39.0%	69	25.5%	136	27.0%	134	24.9%
TATA	36	14.3%	24	9.4%	96	35.4%	216	42.9%	193	35.9%
Mercedes 2628	8	3.2%	4	1.6%	2	0.7%	0	0.0%	0	0.0%

Prime Movers	Yr 2004		Yr 2005		Yr 2006		Yr 2007		Yr 2008	
Total number of units sold	156		208		408		677		607	
Mercedes	115	73.7%	119	57.2%	159	39.0%	139	20.5%	166	27.3%
Mitsubishi-Fuso	21	13.5%	34	16.3%	44	10.8%	38	5.6%	36	5.9%
Scania	16	10.3%	32	15.4%	69	16.9%	95	14.0%	84	13.8%
Nissan Diesel	0	0.0%	0	0.0%	121	29.7%	359	53.0%	271	44.6%

	2004		2005		Yr 2006		Yr 2007		Yr 2008	
Total number of units sold	9979		9532		10051		13015		13135	
Nissan	1231	12.3%	1404	14.7%	1392	13.8%	1536	15.3%	1570	12.0%
DaimlerChrysler	266	2.7%	246	2.6%	325	3.2%	300	3.0%	345	2.6%
Renault	0	0.0%	0	0.0%	0	0.0%	13	0.1%	24	0.2%
D.T Dobie	1497	15.0%	1650	17.3%	1717	17.1%	1849	18.4%	1939	14.8%
Toyota	2535	25.4%	2540	26.6%	2506	24.9%	2864	28.5%	3152	24.0%
Mitsubishi	1822	18.3%	1714	18.0%	1902	18.9%	2326	23.1%	2360	18.0%
Isuzu	1868	18.7%	1454	15.3%	1717	17.1%	2406	23.9%	2512	19.1%

KEY
TOYOTA
NISSAN