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STRATEGIC MARKETING APPROACHES TO ENHANCE THE ADOPTION OF TOYOTA BATTERY ELECTRIC VEHICLES IN INDONESIA, TUNAS TOYOTA CAWANG

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Abstract

This research examines strategic marketing methods to enhance the adoption of Toyota Battery Electric Vehicles (BEVs) in Indonesia, concentrating on Tunas Toyota Cawang from 2022 to 2024. Despite the swift expansion of the Indonesian electric vehicle (EV) market, Toyota's battery electric vehicle (BEV) sales have been subpar, impeded by consumer misconceptions, insufficient charging infrastructure, formidable competition from economical Chinese brands, and a prevailing inclination towards hybrid vehicles. These challenges highlight the necessity for customized marketing methods to enhance Toyota's BEV footprint. The study used a mixed-methods approach, integrating quantitative data from consumer surveys and sales records with qualitative insights derived from interviews with stakeholders, customers, and competitors. This analysis investigates Toyota's segmentation, targeting, and positioning (STP) in East Jakarta, evaluates internal and external influences on BEV adoption, and delineates principal market constraints and possibilities. Findings indicate that insufficient understanding, range anxiety, and elevated initial prices hinder consumer adoption, notwithstanding governmental incentives and growing interest in sustainable transportation. Actionable recommendations are offered to boost awareness, improve customer engagement, and capitalize on market opportunities based on the findings. These encompass educational initiatives, partnerships with influencers, strategic pricing, and the enhancement of charging infrastructure. Toyota should distinguish its BEVs by highlighting reliability, sustainability, and cutting-edge technology. By tackling these obstacles with specific techniques, Toyota can enhance BEV adoption and fortify its competitive stance in Indonesia's expanding EV market.

Keywords: Toyota BEV, Marketing Strategy, Segmentation, Targeting, Positioning, Electric Vehicle Adoption

Introduction

The global shift towards sustainability has driven the adoption of electric vehicles (EVs) as a solution to reduce carbon emissions and dependence on fossil fuels. In various countries, governments and communities have adopted battery electric vehicles (BEVs) to reduce climate change impacts (Hanson et al., 2021; Osterwalder & Pigneur, 2010). BEV vehicles are known as zero-emission vehicles that offer significant environmental benefits compared to traditional fossil-fueled vehicles (Dudziak et al., 2022; Lee et al., 2023). However, despite the rapid growth of the global electric vehicle market, BEV adoption in Indonesia is still lagging behind developed countries such as Norway, China, and the United States.

Several major factors are hampering BEV adoption in Indonesia (Belgiawan et al., 2024; Febransyah, 2021; Saputra & Andajani, 2023). First, limited charging infrastructure is a major barrier. Most areas in Indonesia do not yet have an adequate network of

charging stations, especially outside of big cities like Jakarta. Second, public awareness of the benefits of electric vehicles is still low. Many consumers have misperceptions, such as concerns about range and high maintenance costs. Third, the relatively high initial price of electric vehicles compared to fossil-fueled vehicles is a challenge for consumers in a price-sensitive market like Indonesia. Finally, fierce competition from hybrid vehicles and more affordable products from Chinese brands further complicates the challenge for manufacturers like Toyota.

The combination of these factors has resulted in slow market penetration of BEV vehicles in Indonesia (Setiawan, 2019; Yusuf et al., 2021). Data shows that although EV sales in Indonesia increased from 125 units in 2020 to more than 17,000 units in 2023, Toyota's contribution through its BEV models such as the bZ4X is still very small. Toyota's BEV sales at Tunas Toyota Cawang, for example, only reached one unit in 2024, down from five units in 2023. This shows that Toyota has not been able to optimally utilize the momentum of the EV market growth. As a result, the opportunity to improve its competitive position in the growing Indonesian EV market has been missed.

This study focuses on marketing strategies to increase the adoption of Toyota battery electric vehicles (BEV) in Indonesia, especially in Tunas Toyota Cawang. The main variables analyzed include marketing strategies based on segmentation, targeting, and positioning (STP), as well as market challenges and opportunities. Segmentation includes understanding consumer demographics and psychographics, while targeting focuses on identifying the most potential market segments. Positioning is then used to create a unique image of Toyota BEV compared to competitors. By understanding these variables in depth, this study aims to provide practical and applicable solutions for Toyota in overcoming BEV marketing obstacles in Indonesia.

The novelty of this study lies in the approach that combines quantitative data analysis and qualitative insights to identify barriers and opportunities in Toyota's BEV marketing. Previous studies tend to focus on the technical aspects of electric vehicles or regulatory factors without providing focused marketing solutions that are tailored to the Indonesian market context. This study also features an in-depth analysis of market competition, including strategies used by more affordable Chinese brands such as Wuling and BYD. In addition, data-based recommendations generated in this study are expected to provide relevant strategic guidance for automotive companies in Indonesia.

The urgency of this research is very high considering the global transformation towards electric vehicles as part of efforts to mitigate the impact of climate change. On the other hand, the Indonesian government has issued various incentives to encourage EV adoption, including tax exemptions and subsidies for charging infrastructure. However, without an effective marketing strategy, manufacturers like Toyota risk missing out on opportunities to capitalize on this momentum. By providing specific and measurable solutions, this research can help Toyota overcome BEV marketing challenges and strengthen its position in the growing EV market.

The main objective of this study is to identify effective marketing strategies to increase the adoption of Toyota BEVs in Indonesia. This research is expected to provide benefits both academically and practically. Academically, this research adds to the literature on marketing strategies in the electric vehicle market in developing countries. Practically, the results of this study can be used by Toyota and other automotive manufacturers to develop more effective marketing strategies. In addition, the recommendations produced can help the government in designing more targeted policies to encourage the adoption of electric vehicles in Indonesia. Thus, this research is not only

beneficial for the automotive industry but also for national efforts in achieving environmental sustainability goals.

Research methods

Research Approach

This study is a qualitative study with a descriptive approach (Creswell & Creswell, 2018) that aims to explore and understand effective marketing strategies to increase the adoption of Toyota's battery-based electric vehicles (BEV) in Indonesia, especially in East Jakarta. This study was conducted by integrating empirical data from various sources to provide a comprehensive picture of the challenges and opportunities faced by Toyota in marketing BEVs in the Indonesian market.

Location and Time of Research

This research was conducted at Tunas Toyota Cawang, one of Toyota's main dealers located in East Jakarta. The selection of this location was based on its relevance to the focus of the research, which is to analyze Toyota's BEV marketing strategy in a dynamic market such as East Jakarta. The research was conducted over a period of six months, from January to June 2024, to ensure adequate and in-depth data coverage related to market conditions and the implementation of marketing strategies at the research location.

Population and Sample

The population of this study is potential consumers of electric vehicles in East Jakarta and parties relevant to Toyota's BEV marketing, including Toyota marketing managers, customers who have purchased BEVs, and competitors. The research sample consisted of 50 individuals selected by purposive sampling, including 20 potential consumers, 15 Toyota customers, 10 Tunas Toyota Cawang employees, and 5 representatives from competing brands. This sample selection method is designed to ensure relevant representation and support in-depth data collection.

Data Collection Strategy

Data was collected through a combination of primary and secondary methods. Primary data was obtained through in-depth interviews and surveys with selected respondents. This method provides direct insight into consumer experiences and perceptions as well as Toyota's marketing strategies. Secondary data was obtained from Toyota's internal reports, sales statistics, and government policies related to electric vehicles. The combination of both types of data ensures a comprehensive and context-rich analysis.

Data Validity and Reliability

To ensure the validity and reliability of the data, several steps were taken. Method triangulation was used by comparing data from interviews, questionnaires, and observations. Content validity was ensured through the development of research instruments based on relevant literature and theories. In addition, the collected data were evaluated by experts to ensure accuracy and relevance.

Results and Discussion

Segmentation

The purpose of this study is to determine the segmentation of consumer preferences and behaviors regarding the utilization of automobiles in day-to-day life by employing cluster analysis. The information obtained from three hundred and fifty individuals who filled out a questionnaire was evaluated for the purpose of segmentation according to demographic variables such as age, gender, educational background, and earning capacity. Furthermore, market segmentation was carried out on the basis of consumer preferences, awareness and perceptions, purchasing decisions and factors, as well as customer information of Toyota body-electric vehicles and study of competitors. K-means Cluster approach was utilized to conduct an analysis of consumer segmentation (Ali & Sheng-Chang, 2020; Guo et al., 2021). This method locates the cluster center by using the average value of each cluster. The following tables give an overview of the findings that were obtained from the cluster analysis.

Table 1. ANOVA

Indicator	Cluster		Error		F	Sig.	Conclusion
	Mean Square	df	Mean Square	df			
Zscore(CPS1)	19,857	3	0.836	346	23,739	0.000	Significant
Zscore(CPS2)	28,606	3	0.761	346	37,608	0.000	Significant
Zscore(CPS3)	11.128	3	0.912	346	12,200	0.000	Significant
Zscore(CPS4)	42.210	3	0.643	346	65,678	0.000	Significant
Zscore(CPS5.1)	78,053	3	0.332	346	235,166	0.000	Significant
Zscore(CPS5.2)	78,677	3	0.327	346	240,970	0.000	Significant
Zscore(CPS5.3)	21,790	3	0.820	346	26,581	0.000	Significant
Zscore(CPS5.4)	24,329	3	0.798	346	30,497	0.000	Significant
Zscore(CPS5.5)	55.205	3	0.530	346	104,158	0.000	Significant
Zscore(CPS5.6)	9.158	3	0.929	346	9,855	0.000	Significant
Zscore(CPS5.7)	10,471	3	0.918	346	11,408	0.000	Significant
Zscore(CPS5.8)	11,797	3	0.906	346	13.015	0.000	Significant
Zscore(CPS6)	55,429	3	0.528	346	104,966	0.000	Significant
Zscore(APS1)	3.411	3	0.979	346	3.484	0.016	Significant
Zscore(APS2)	34,874	3	0.706	346	49,376	0.000	Significant
Zscore(APS3.1)	72,491	3	0.380	346	190,696	0.000	Significant
Zscore(APS3.2)	71,065	3	0.392	346	181,060	0.000	Significant
Zscore(APS3.3)	13,031	3	0.896	346	14,549	0.000	Significant
Zscore(APS3.4)	17,921	3	0.853	346	21.002	0.000	Significant
Zscore(APS3.5)	26.106	3	0.782	346	33,370	0.000	Significant
Zscore(APS3.6)	29,924	3	0.749	346	39,941	0.000	Significant
Zscore(APS3.7)	24.204	3	0.799	346	30.301	0.000	Significant
Zscore(APS3.8)	12.202	3	0.903	346	13,514	0.000	Significant
Zscore(APS3.9)	39,254	3	0.668	346	58,735	0.000	Significant
Zscore(APS3.10)	3.444	3	0.979	346	3,518	0.015	Significant
Zscore(APS3.11)	14.194	3	0.886	346	16,027	0.000	Significant
Zscore(APS4)	66,284	3	0.434	346	152,747	0.000	Significant
Zscore(APS5)	14,180	3	0.886	346	16,010	0.000	Significant
Zscore(APS6)	68,181	3	0.418	346	163.303	0.000	Significant
Zscore(PDD1)	87,834	3	0.247	346	355,459	0.000	Significant
Zscore(PDD2)	61,379	3	0.476	346	128,815	0.000	Significant
Zscore(PDD3.1)	66,265	3	0.434	346	152,644	0.000	Significant
Zscore(PDD3.2)	41,517	3	0.649	346	64,000	0.000	Significant
Zscore(PDD3.3)	15,640	3	0.873	346	17,914	0.000	Significant

Indicator	Cluster		Error		F	Sig.	Conclusion
	Mean Square	df	Mean Square	df			
Zscore(PDD3.4)	2,960	3	0.983	346	3.011	0.030	Significant
Zscore(PDD3.5)	23,373	3	0.806	346	28,999	0.000	Significant
Zscore(PDD3.6)	17,766	3	0.855	346	20,789	0.000	Significant
Zscore(PDD3.7)	19,960	3	0.836	346	23,887	0.000	Significant
Zscore(PDD3.8)	22,841	3	0.811	346	28,177	0.000	Significant
Zscore(PDD3.9)	3.426	3	0.979	346	3,500	0.016	Significant
Zscore(PDD3.10)	6.230	3	0.955	346	6,526	0.000	Significant
Zscore(PDD3.11)	4.153	3	0.973	346	4.270	0.006	Significant
Zscore(PDD3.12)	3,794	3	0.976	346	3.888	0.009	Significant
Zscore(PDD3.13)	13,417	3	0.892	346	15,036	0.000	Significant
Zscore(PDD3.14)	13,768	3	0.889	346	15,482	0.000	Significant
Zscore(PDD4.1)	42,311	3	0.642	346	65,923	0.000	Significant
Zscore(PDD4.2)	45.127	3	0.617	346	73,091	0.000	Significant
Zscore(PDD4.3)	20,931	3	0.827	346	25.303	0.000	Significant
Zscore(PDD4.4)	49,257	3	0.582	346	84,695	0.000	Significant
Zscore(PDD4.5)	65,971	3	0.437	346	151,079	0.000	Significant
Zscore(PDD5)	36,522	3	0.692	346	52,776	0.000	Significant
Zscore(PDD6)	43,539	3	0.631	346	68,981	0.000	Significant
Zscore(PDD7)	62,648	3	0.465	346	134,588	0.000	Significant
Zscore(PDD8)	52,465	3	0.554	346	94,740	0.000	Significant
Zscore(PDD9)	88,884	3	0.238	346	373,470	0.000	Significant
Zscore(PDD10)	72,579	3	0.379	346	191,314	0.000	Significant
Zscore(TBCA1)	12,748	3	0.898	346	14.194	0.000	Significant
Zscore(TBCA2)	60,449	3	0.485	346	124,754	0.000	Significant
Zscore(TBCA3.1)	67,249	3	0.426	346	158,015	0.000	Significant
Zscore(TBCA3.2)	22,590	3	0.813	346	27,792	0.000	Significant
Zscore(TBCA3.3)	22,164	3	0.817	346	27,144	0.000	Significant
Zscore(TBCA3.4)	19,795	3	0.837	346	23,649	0.000	Significant
Zscore(TBCA3.5)	61,492	3	0.476	346	129,321	0.000	Significant
Zscore(TBCA3.6)	20,405	3	0.832	346	24,533	0.000	Significant
Zscore(TBCA3.7)	24,683	3	0.795	346	31,061	0.000	Significant
Zscore(TBCA3.8)	22,371	3	0.815	346	27,459	0.000	Significant
Zscore(TBCA3.9)	3.167	3	0.981	346	3.227	0.023	Significant
Zscore(TBCA4)	101,253	3	0.131	346	774,401	0.000	Significant
Zscore(TBCA5.1)	76,860	3	0.342	346	224,574	0.000	Significant
Zscore(TBCA5.2)	33,372	3	0.719	346	46,394	0.000	Significant
Zscore(TBCA5.3)	11,758	3	0.907	346	12,968	0.000	Significant
Zscore(TBCA5.4)	21,936	3	0.818	346	26,801	0.000	Significant
Zscore(TBCA5.5)	69,889	3	0.403	346	173,553	0.000	Significant

Based on the table above, all indicators have a Sig. value of < 0.05, indicating that there are significant differences among the four clusters formed.

Targeting

A number of different segments will be selected as the primary target of marketing operations based on the four clusters that have been developed. The K-means cluster analysis led to the formation of four distinct clusters: Cluster 1 had 138 respondents, which accounted for 39% of the total, Cluster 2 had 25 respondents, which accounted for 7%, Cluster 3 had 21 respondents, which accounted for for 6%, and Cluster 4 had 166 respondents, which had 47% of the total. In light of this, it is possible to conclude that

Cluster 1 and Cluster 4 ought to be given priority as target marketing groups. This is particularly true when considering the fact that the majority of respondents in both clusters are contemplating the acquisition of electric vehicles.

External Analysis

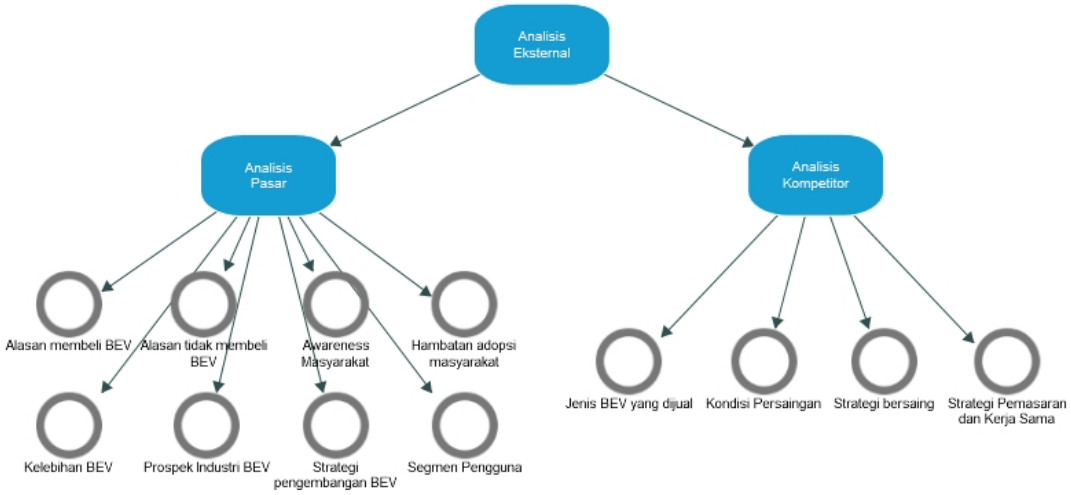


Figure 2. External Analysis

Based on the figure above, the analysis of the Battery Electric Vehicle (BEV) market environment in Indonesia and outside Toyota's scope, focusing on three main aspects. First, it examines the BEV market in Indonesia, exploring the demand for electric vehicles, consumer behavior, and market trends. This analysis helps identify the preferences and expectations of potential customers and the overall adoption rate of BEVs in the country. Second, it evaluates Toyota's BEVs in comparison to competitors. This involves understanding the strengths, weaknesses, pricing strategies, product features, and market positioning of rival manufacturers. By identifying gaps and opportunities, Toyota can refine its approach and create more competitive products. Third, it assesses the overall BEV industry environment in Indonesia, analyzing external factors such as government regulations, economic trends, technological advancements, and infrastructure development, including charging networks. These insights enable Toyota to anticipate challenges and leverage opportunities for growth.

Technology

When it comes to developing advantages over competitors, technology is an essential component. Adoption of battery electric vehicles (BEVs) is dependent on the development of battery technology as well as the extension of charging infrastructure (Kawamoto et al., 2019; Ntombela et al., 2023; Oliveri et al., 2023). The expanding but insufficient charging infrastructure is one of the principal obstacles that continues to stand in the way of widespread adoption of battery electric vehicles (BEVs). This is a key aspect in this market. PLN has installed as of the first half of 2024 a total of 1,582 public electric vehicle charging stations (SPKLU), 2,182 battery swap stations (SPBKLU), 9,956 general electric charging outlets (SPLU), and 14,524 residential charging stations over the entirety of Indonesia (PLN, 2024). These SPKLU stations are spread throughout 1,131 locations across the country, making it easier for owners of BEVs to obtain charging

facilities. The number of people using home charging has also increased significantly, reaching 14,524 individuals. This is a 335% increase when compared to the same time period in the previous year. This represents a 344% increase over the 960.1 MWh that was consumed for home charging in the first half of 2023 (PLN, 2024). Additionally, the amount of electricity that was consumed for home charging increased dramatically, reaching 4,264.8 MWh in the first half of 2024.

In addition, Indonesia has started investigating improved battery technologies in order to boost the development of BEV in the country. The Indonesia Battery Corporation (IBC) was founded in March 2021. It is comprised of four state-owned firms in the mining and energy sectors. These enterprises include the mining industry holding company MIND ID, the nickel miner Aneka Tambang (Antam), the electric utility PLN, and the oil and gas company Pertamina. Through the implementation of this plan, Indonesia is demonstrating its dedication to establishing a domestic battery supply chain and reducing its dependency on imports. In addition, the Chinese battery giant CATL (Contemporary Amperex Technology Co. Limited), which supplies notable automobile manufacturers throughout the world such as Tesla, BMW, and Volkswagen, has pledged to invest $5 billion in Indonesia's battery industry (CSIS, 2022). With this investment, it is anticipated that innovation will be pushed forward, production costs will be reduced, and Indonesia's position as a vital participant in the global battery supply chain will be strengthened.

Competitor Analysis

Competitor analysis refers to understanding the strategies employed by Toyota's competitors in marketing Battery Electric Vehicles (BEVs). Four main categories of strategies have been identified: the types of BEVs being sold, the competitive landscape, competitive strategies, and the marketing and partnership strategies implemented by competitors. This analysis is crucial for gaining insight into how Toyota's competitors market their BEVs and the approaches they use to capture market share. The following is a detailed explanation of each strategy category.

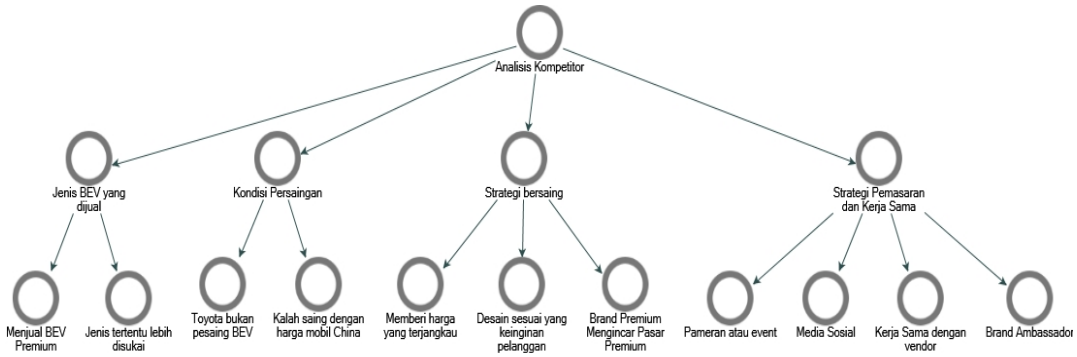


Figure 3. Competitor Analysis

Internal Analysis

Internal analysis is a critical step in understanding Toyota's strengths and weaknesses in competing within the BEV (Battery Electric Vehicle) market. By examining its resources, including technology, workforce, and other assets, Toyota can maximize its competitive advantages. Additionally, value chain analysis allows Toyota to identify steps in the production and distribution process that can be optimized to improve efficiency and competitiveness. Marketing strategies developed based on internal analysis enable Toyota to effectively target the right market segments, increasing

the potential for BEV sales. Through this approach, Toyota can leverage its internal strengths to address the challenges of the dynamic BEV market.

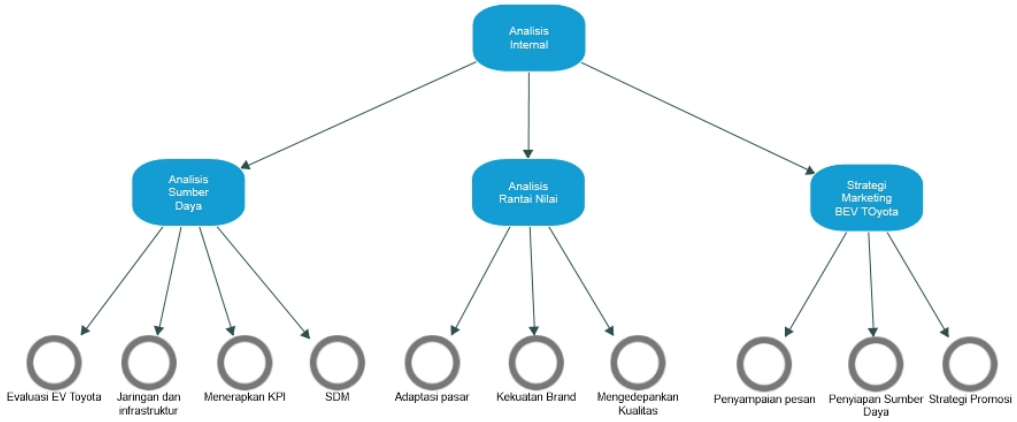


Figure 4. Internal Analysis

Resources

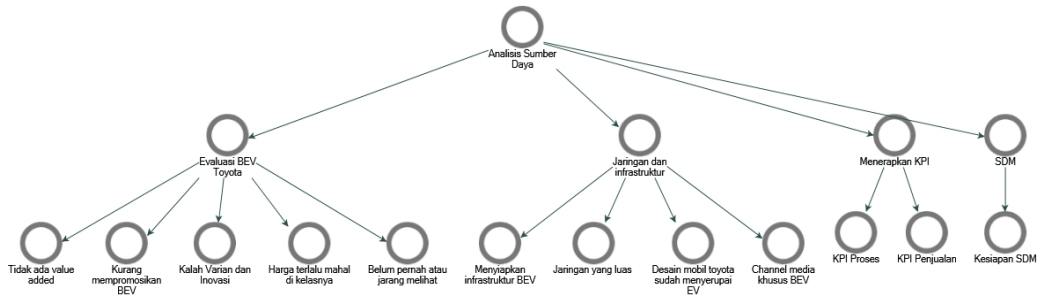


Figure 5. Resource Analysis

Resource analysis refers to the process of evaluating the various resources owned by an organization or company to determine its capabilities and advantages in achieving strategic goals. This analysis aims to identify the strengths and weaknesses of the resources that could impact the organization's competitiveness in the market. Four categories have been identified within this theme: Evaluation of Toyota BEV, Network and Infrastructure, Implementation of KPIs, and Human Resources. Below is an explanation of each category.

Conclusion

This research emphasizes the primary determinants affecting the acceptance of Toyota Battery Electric Vehicles (BEVs) in Indonesia, specifically regarding Tunas Toyota Cawang. Despite the rapidly expanding electric vehicle (EV) market, Toyota encounters several obstacles to battery electric vehicle (BEV) adoption, such as inadequate customer knowledge, misconceptions regarding the dependability and practicality of BEVs, and a lack of appropriate charging infrastructure. Moreover, competition from cost-effective Chinese BEV firms and the inclination towards hybrid vehicles instead of fully electric ones further complicates market entry. Opportunities arise from government subsidies, heightened environmental awareness, and improvements in charging infrastructure, which can be exploited to enhance Toyota's market position. The study's findings highlight the need for strategic marketing tailored

to the demands of Indonesian consumers. These tactics must highlight the environmental, economic, and technological advantages of BEVs while addressing customer apprehensions regarding cost, infrastructure, and battery efficacy. Utilizing digital marketing, influencer collaborations, and experiential marketing can significantly increase awareness and engagement. Moreover, guaranteeing that Toyota BEVs are affordably priced and well supported by infrastructure enhancements will be essential for promoting uptake.

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