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Strategic Factors Influencing Market Share of Telecommunications in Kenya

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Abstract

The main aim of the paper was to determine the influence of competitive strategies on the market share in the telecommunications firms in Kenya using two samples. The first sample comprised of a population of 362 telecommunications employees and the second comprised of 150 customers both randomly selected from the respective populations of the selected firms. Structured and open ended questionnaires were used in the study. Price and products differentiations were highly rated as competitive strategies. Results of this research offered necessary feedback for improving a company's strategy, services and product offerings, thereby achieve customer satisfaction and improve their market share. This research recommends that telecommunications firms should incorporate the views of all stakeholders in setting their strategic direction therefore encourage ownership among internal stakeholders enabling improved service delivery, invest in signal strength aimed at offering reliable network coverage and long-term relationship with customers through customer reward programs to increase their market share.

Keywords: *Telecommunications, Firms, Competitive Strategies & Market Share.*

1.1 Introduction

Research telecommunications is one of the key enablers of economic growth development in the world. It plays a central role in connecting society and linking business to families. Today the mobile telecommunication services have changed people's lifestyles by transforming and revolutionizing the way they work and interact. The growth of this sector has expanded market

boundaries and information flows throughout the world and has enabled nations across the globe conduct business within seconds. Telecommunication operators in the world are always concerned with the size of the potential market for their products or services and the proportion of that market they actually reach often referred to as a company's market share. Farris (2010) defines market share as the percentage of a market defined in terms of either units or revenue accounted for by a specific entity or a business organizations. Strategies on market share is said to be a key indicator of market competitiveness that is, how well a firm is doing against its competitors, how well mobile operator is doing in contrast to other operators. Research has also shown that market share is a desired asset among competing firms.

Stuffer (2014) in his study done USA about market share strategy clarified that every organization that is aiming at having a profitable market share must have a strategy prior to the success that is always seen as a bigger share. Higher market share puts companies at a competitive advantage. Companies with high market share often receive better prices from suppliers, as their larger order volumes increase their buying power. Also, increased market share and greater production go hand-in-hand, with the latter decreasing a company's cost to produce an individual unit due to economies of scale.

In addition, innovation is one of the strategies by which a company like mobile phone operators can use to increase market share. A study done in Asia by Blechman (2015) revealed that when a firm brings to market a new technology its competitors have yet to offer, consumers wishing to own the technology buy with that company, even if they previously did business with a competitor. Many of those consumers become loyal customers, which adds to the mobile operators' market share and decreases market share for the firm from which they switched. This indicates how vital innovation is in making sure that the mobile operator remains on toes when it comes to the share in the market. The higher the rate of market share may be directly proportional to its innovation (Dilhac, 2014).

Oteri (2015) conducted a study in Kenya and his findings showed that one of the surest strategies methods to increase market share is acquiring a competitor. By doing so, a company accomplishes two things. It taps into the newly acquired firm's existing customer base, and it reduces the number of firms fighting for a slice of the same pie by one. Also, diversification of the services was found to be among other factors that played dynamics in market share among Safaricom, Telkom Kenya, Airtel and Equitel, then mobile operators.

The outlook of the communication sector in Kenya continues to be strong and growth achieved through gaining new customers, offering new services, and in general capitalizing on the growing role of telecommunications in people's everyday lives. The mobile sector in the country continues to grow increasingly competitive with a variation in market share among telecommunication providers. Kenya's telecommunication market share has experienced variation over time since the establishment of mobile communications in Kenya. The current market of mobile communication in Kenya constitutes four (4) mobile operators namely Safaricom Ltd, Airtel Networks Kenya Ltd, Telkom Kenya Ltd and Equitel Kenya. The total number of mobile customers in Kenya stood at 37,865,207 as per CAK (2015). In the recent CAK (2015) report, Safaricom Ltd is in the top position among the four operators controlling two-thirds (66.3%) of the market share followed by Airtel at 19.1%. The third largest market shareholder is Telkom Kenya Ltd 11.8 % and last is the new market entrant Equitel Kenya holding 2.9%. This research therefore seeks to assess and analyse the strategic factors that

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have contributed to the apportioning of the market share of the mobile market in Kenya. Thus, the study hypothesized that:

HO: *There is no significant difference between competitive strategies of firms classified according to market share.*

2.1 Theoretical Framework

2.2 Theory of Market Share

The present study was operating under the Theory of Market share as outlined by Miniter (2002) companies that maximize market share are attributed to its leadership style. The theory further explained that dominant firm can add features to its product ,for instance apart from phone calls other factors determine market share which include: Mobile money transfer, text messaging system, prepaid airtime, free calls during holidays and some hours of the day or reduce its marginal profit to control the price. Miniter (2002) also argues that market share is about the past and is calculated by examining and tabulating sales that have already occurred. This means that the history of a telecommunication company directly influence the market share, new entrance to the business may have less number of customers and thus market share is compared to the old player. Miniter (2002) views market share as a by-product of pursuing a company's core mission. Market share is not an advantage by itself but is the result of a sustainable competitive advantage, not the cause. Therefore a company must be having a competitive advantage either in terms of leadership or even technical team of innovators and promoters. This determines the share each company possess in telecommunication systems in Kenya.

Secondly, the theoretical framework deal with competitive strategies was explained by Wang (2014), there were two dominant theories of competitive advantage: the Market-Based View (MBV) and Resource based view (RBV). RBV draws attention to the firm's internal environment as a driver for competitive advantage and emphasizes the resources that firms have developed to compete in the environment while MBV of strategy argues that industry factors and external market orientation are the primary determinants of firm performance.

2.3 Review of Related Literature and Studies

This section aims to give an overview in the general literature and prepares for the following section focused on the strategic factors influencing the market share in Kenya.

2.4 Market Share

Moghaddam and Foroughi (2012) defined market share as an elements of marketing strategy and one of the important items that affect market share is elements of the marketing mix and hence concluded that product strategy, promotion strategy, pricing strategy and place strategy are important elements to increase the market share. According to Ombok (2014), the Kenyan government supports increased competition in the telecommunications industry, to ensure customers are able to shop around for the best service and prices. It is widely recognized that one of the main determinants of business profitability is market share. Under most circumstances, enterprises that have achieved a high share of the markets they are considerably more profitable than their smaller-share rivals companies. Market share is positively related to the rate of return on investment earned by a business. Recognition of this relationship will affect how managers decide whether to make or buy to decrease purchasing costs, whether to advertise in certain media, or whether to alter the price or quality of a product.

Walters (2003) observes that the telecommunications industry is being rocked by change fuelled by the advent of the tremendous success of the internet and its technologies. For quite some time, there has been competition in the telephony business. Long-distance rates have seen continuous decreases for two decades as new carriers sought to capture greater and greater market share. The role of the market share or market standing is considered one of the most important business objectives according to Ansoff, (2013). Achieving market share leadership in a product-market or segment can play a major role in enhancing the long-term competitive advantage of a business. Therefore, many customers prefer to deal with high-market share businesses because they perceive less risk in dealing with a business that is considered substantial, and whose position in the industry appears to be secure. Jamison (2012) described that barriers in achieving a workable competition can be divided into demand side market features, supply side market features, and firm conduct issues. Demand side market features include switching costs, network effects, and lack of customer information. Switching costs discourage customers from changing suppliers. Network effects, if captured by a single firm, make it hard for rivals to offer services of comparable value to that provided by the dominant firm.

Vorhies and Morgan (2005), in their study of marketing capabilities, found that high performing firms had a stronger marketing strategy implementation capability than did average performers. Therefore, when market share increases a firm is likely to have a reputable recognition in the sector and therefore increased products sell and higher profits. Yannopoulos (2011) stated that markets are dynamic arenas where firms try to expand into their industries or reposition themselves in other segments within the industry. As firms attempt to improve their position, they engage in competitive battles and adopt offensive strategies. Successful use of offensive strategies can help a firm improve its competitive position, gain market share and increase profits.

The telecommunication has been part of a larger class of industries, public utilities, with similar technological, economic and public service characteristics by tradition. Telecommunication has a significant social, cultural and economic impact on the modern society. In 2008, estimates placed the telecommunication industries Revenue at $3.85 trillion or just under 3 % of the gross world product (Plunkett Research Limited, 2010). The technological advances in the telecommunication sector are associated with an uninterrupted growth of the mobile sector. The prime focus of the service providers is to create a loyal customer and increase business penetration. Progress in information technologies and telecommunications over the last two decades has created a knowledge society. Effective customer management is becoming increasingly important. Understanding and analyzing customer preference in a scientific way will be a potential competitive advantage for the existing operators as well as new-comers.

In reference to PWC (2012), billions of dollars of international investment flowing in and subscriber numbers is raising across the continent, Africa's communications marketplace has now passed the tipping point from high potential to high growth. Unburdened by a legacy of installed telecom infrastructure, Africa has leapfrogged the fixed-line phase of development to go straight to mass-market mobile networks and services. Even as Africa's total mobile subscriptions soar past 500m, a huge, untapped market is still up for grabs by a wide range of local, regional and global players. In addition to being one of the world's most dynamic telecom markets Africa is also among the most innovative, a global testing lab and a leader in digital and mobile-enabled applications in areas like payments, commerce, health and education.

2.5 Competitive Strategies

To obtain firm performance within the scope of sustainable competitive advantage, decisions on shaping firm's competitive strategies are one of the main issues for managers under firms' business level strategy. The formulation and completion of competitive business strategies that will improve performance and one of the competent methods to achieve firm's sustainable competitive advantage. Many firms that pursue heading into a market that is flooded with competitors fail to realize that you must obtain competitive strategy to stay up to speed with this ever changing market. Therefore, the impact of competitive strategies on firm performance is a major issue of unease the policy makers and has been playing important role to refine firm performance for a long time. Competitive advantage is the result of a strategy helping a firm to maintain and sustain a favorable market position. This position is translated into higher profits compared to those obtained by competitors operating in the same industry (Calcagno, 2007). A company is said to have a competitive advantage over its rivals when its profitability is greater than the average profitability of all other companies competing for the same set of customers. A company has a sustained competitive advantage when its strategies enable it to maintain above-average profitability for a number of years.

The effect of competitive strategies on firm performance is analyzed in numerous studies. According to Porter (2005), firms with a clear strategy outpace firms without a strategy. This argument constitutes the base of his competitive strategies. Porter (2005) also contends that generic strategies which are namely, cost leadership, product differentiation, and focus strategies, are mutually limited or at least non complementary and there are rare companies that can adopt more than one of these strategies simultaneously because of its high cost. Competitive strategies introduce a powerful tool for the strategists, decisions makers to diagnose and enhance competitive advantage. On the other side, value chain analysis allows the managers to separate the underlying activities a firm performs in designing, producing, marketing and distributing its product or service (Porter, 2005). Tehrani (2003) discusses the impact of five types of competitive strategies (product differentiation, low cost, marketing differentiation, focus product differentiation, and focus low cost) on preeminent performance among sixteen segments of high-tech industries in the USA and Europe. The results indicate that the relationship between competitive strategy and performance depends on the geographies the firm operates in, since US firms that adopt product differentiation, low cost and focus product differentiation had superior performance than others while in Europe only the low cost firms outperformed other firms.

Arasa and Githinji (2014) described how product differentiation can fulfil a customer need and it involves tailoring the product or service to the customer. This allows organizations to charge a premium price to capture market share The development of money transfer service Mpesa in 2007 by Safaricom has made the mobile voice has a differentiation over the others firms, since it was the first launched in the Kenyan market.

The most widely applied marketing strategy is perhaps McCarthy's "4 Ps" This marketing-mix involves four key variables, namely Price, Product, Place and Promotion. "P" as "Price" is generally a fee or a charge that is competitive in the market and enables a full cost recovery. "P" as "Product" refers primarily to quality (contents, brands, and water service lines) and quantity (capacity or storage) of and services. The latter must meet stakeholders' needs, practice, habit, belief, attitude and value or displays an appealing idea, brand or a label that represents the benefits resulting from consumption of the said production (Martinsen, 2008).

"P" as "Place" stands for administrative distribution of goods and services in the market. It includes the organization of service providers (suppliers) and users (clients) into specific physical and social networks for easy supply of goods and services to the market and communication. "P" as "Promotion" is the most important activity of any marketing strategy. It encompasses public relations, promotional activities and advertising or publicity. The Product price competition has made it possible for the customer to be choosy about his service provider. Price is one important factor on which customer relies while choosing a service provider. One of the basic strategies a new entrant employs while entering the market is to offer competitive price to lure customers of the competitor. Price plays a vital role in telecommunication market especially for the mobile telecommunication service providers (Kollmann, 2000). Generally, a price dominated mass market leads to customers having more choices and opportunities to compare the pricing structures of diverse service providers. A company that offers lower charges would be able to attract more customers committing themselves to the telephone networks, and hence, significant number of "call minutes" is achieved. Draganska and Jain (2006) stated that a common strategy for a company extending their product or service is to differentiate their offerings vertically. In this era of information age, price competition has become cut throat in mobile telecommunication industry. Trebing (2001) mentioned that there are three sets of strategies for pricing behavior. The first is limit entry pricing, which is used for protection of the market position of the firm; second is the high access charges for new entrants, and the third one is tie-in sales to write off old plant or standard investment against captive customers. Munnukka (2005) also explained that in mobile services sector business practitioners are facing problems in pricing decisions as they are short of knowledge on their customers' price sensitivity levels and dynamics. It was discovered that mobile service customers differ significantly in their price sensitivity levels; customers with moderate usage of mobile services are least price sensitive, while intensive and low-end users are most sensitive to price changes.

Promotion is one of the medium which is used by organization to communicate with consumers with respect to their product offerings (Kotler, 2000). It is an important part for all companies, especially when penetrating new markets and making more or new customers (Kotler, 2000). The objectives of any promotional strategy is to increase sales, improve market share, improve brand recognition and educate the market in order to create a competitive product for the consumers. Promotion is when companies inform, persuade, or remind customers and the general public of its products (Kotler & Armstrong, 2011). Promotions impact consumers' purchasing behavior and decisions towards that particular brand, especially during the sales promotion period (Freo, 2005). Promotional actions must be well planned, systematically organized, and commonly integrated into the subject corporation's strategic marketing plan. Consumers have become very much brand conscious. The brand image of an operator communicates to the customer as to what value he can expect from the brand. The customer attaches a level of expectation from the product or services of the company depending on the brand image he has come to associate with the company. Most often the consumer makes the switching decision on his operator based on its brand image. The telecom services companies, therefore, are required to strengthen their brand image and preserve it.

Fatih (2013) concluded that sustainable competitive advantage has become one of the crucial targets in the dynamic market and business environment. Thus, to obtain competitive advantage as firm, business strategies is one of the important missions of decision makers. Therefore

choosing the right strategy that will enable the firm to compete aggressively and win the customers to their network.

According to Neokosmidi (2005), competition among firms is growing, their main goal is to define strategies to achieve maximum performance, resulting in greater profit. Therefore, companies are focused on the impact of advertising and market share on the profitability. Pearce and Robinson (2007) highlighted that survival in the market; growth and profitability were the three main economic goals that defined company's performance and guided its strategic behavior. Companies in every industry are seeking ways to get a clear, accurate view of operational performance and they need an effective and reliable approach to connect operational performance to financial results. Today, sustainable competitive advantage has become one of the crucial targets in the dynamic market and business environment.

3.1 Material and methods

The research design was causal-comparative. The target population of interest for this study is telecommunication firms in Kenya. Data was collected from four key telecommunication firms in Kenya. The target population was 362 management employees currently working with three major telecommunication firms in Kenya at their head offices in Nairobi (CAK, 2015). Since the population size of the study is manageable all the employees (from Safaricom, Airtel and Telkom Kenya) shown in above table were involved in the study. The employees were drawn from the finance, marketing, engineering and quality assurance departments of the telecommunication firms purposively. A return rate of 80% was acceptable. Data was collected using a questionnaire which was developed by the researcher and self-administered to the respondents. In this study to ensure the reliability of the instrument Cronbach's Alpha was used. Cronbach's Alpha value is widely used to verify the reliability of the construct. Therefore, Cronbach Alpha was used to test the reliability of the proposed constructs. The findings indicated that competitive strategies used had a coefficient of 0.751 All constructs depicted that the value of Cronbach's Alpha are above the suggested value of 0.6 thus the study was reliable Zikmund (2013). Descriptive statistics like mean and standard deviation were used to answer research question one and two.

4.1 Findings

This section discussed in details the presentation, analysis and interpretation of the data collected for the analysis of strategic factors affecting the telecommunication market share in Kenya. The study targeted 362 management employees but managed to obtain responses from 309 of them thus representing 85.4% response rate.

4.2 Competitive Strategies

Management employees were required to indicate the extent to which they agreed to various aspects on competitive strategies adopted by telecommunications in Kenya in relations to market share. Items were measured on a four point scale (1=Disagree, 2=Tend to Disagree, 3= Tend to Agree and 4 Agree. Table 1 presents the results.

Table 1: Competitive Strategies

Statements	Mean	Std. Deviation
Strategic planning is a factor that determines the number of our customers	3.25	0.956
Our firm has strategic planning team to strategize on market share	2.92	0.906
The strategic planning team incorporates the views of other employees	2.37	1.01
Specific emphasis is put on service delivery as it influence customer numbers	2.98	0.962
we differentiate our products from those of our competitors	3.25	0.774
We price our products with the aim of recouping our expenses	3.26	0.766
We have a wide country wide network of shops aimed at improving our customer base distributors are involved in strategic planning of our company	3.03	1.087
Promotion strategies are the best option to increase market share	2.37	1.01
Competitive strategies used by the organization	3.07	0.913

On average majority of the employees tended to agree (2.944) that the various competitive strategies adopted applied in their organizations. Pricing and Product differentiation were rated the highest amongst the competitive strategies as by high means of 3.26 and 3.25 respectively. However, it was clear from the research findings that majority of the respondents tended to disagree (2.37) that the strategic planning team incorporated the views of other employees during planning. On the same rating it was clear that distributors of telecommunications were involved to a least extent in the strategic planning of the companies as presented.

This finding complements the findings of Arasa and Githinji (2014) who established that product differentiation which involves tailoring the product or service to the customer specifications can fulfill a customer need. This allows organizations to charge a premium price to capture market share. Product differentiation is a strategy that businesses use to distinguish a product from similar offerings on the market and focuses on the cost value of the product versus other similar products on the market. It also creates brand loyalty among customers and gains market share through perceived quality, cost savings may create loyalty from consumers. Choosing a pricing objective and associated strategy is an important function of the business owner and an integral part of the business plan (Roth 2007). According to Agwu and Carter (2014), among the four Ps, price is the only income generator and it is the value attached to a product. However, lack of consensus on the strategic direction between senior management and junior employees negatively affected attainment of set goals hence diminishing telecommunication market share as a result. Lack of stakeholder (distributors) involvement was also common among the telecommunications thus negatively impacting their market share. This is in agreement with Martisen (2008) who contends that stakeholders' needs must be met before a product or service appeals to them.

4.3 Statistical Difference between Competitive Strategies According To Market Share

Table 2: Descriptive Statistics - Competitive Strategies used by the Organization.

					Confidence 95%			
	N	Mean	Std. Deviation	Std. Error	Lower Bound	Upper Bound	Min	Max
High	117	2.8608	0.55191	0.05102	2.7597	2.9618	2	4
Ave	98	3.018	0.50671	0.05119	2.9164	3.1196	1.78	3.78
Poor	94	2.9709	0.5608	0.05784	2.856	3.0858	1.78	4
Total	309	2.9441	0.54327	0.03091	2.8833	3.0049	1.78	4

Table 2 reveals that on average, majority of the employees tended to agree that that the competitive strategies under study had been adopted by the firms. This is explained by high means of 2.9441 as registered. The analysis shows that the company with high market had the least mean of 2.8608, followed by least in market share, 2.9709, and in between in market share, 3.0180. This could have been attributed mainly by stiff competitive strategies adapted by its competitors. Airtel's UnlimiNet, for instance, has posed stiff competition, allowing users to enjoy minutes, voice calls and SMSs to any network. It is at the moment the most affordable cross-network voice call in Kenya with rates as low as Sh1.7 per minute. The product offers free whatsapp, Facebook and twitter, making it more popular. Telkom Kenya has also been attracting new users to stay hooked to its network, it launched a phone priced at Ksh 1 000, along with a dual SIM with 3G capacity. The war on competitive strategies continues dominate the market with each operator trying to increase its market share.

5.1 Conclusions

The objective of this study was to assess strategic factors influencing market share of telecommunications in Kenya. The findings reveal that the strategic factors under study have a significant effect on the market share of telecommunications in Kenya. The findings suggested that under competitive strategy product differential and price influence market share. Therefore, firms need to manufacture a unique product with better quality and affordable price. Customer needs are different kinds of products with specific specification therefore the need to consider customers views and have after-sale service to get back feedback on products sold. Companies need to decrease their cost to offer better price to customers due to the first important item for buyers, which is the price of products. Therefore, the research finding reveals that competitive strategies increases market share and put companies at a competitive advantage.

6.1 Recommendations

The current study investigated strategies that affects market share of telecommunication in Kenya. For this, it is expected that the findings of this study will provide constructive new insights and implications to mobile phone practitioners and both researchers across the board and more specifically in the Kenya Market. Telecommunication companies should incorporate

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the views of all stakeholders and have regulator interaction during the setting of the strategic planning process. This will go a long way in minimizing resistance while penetrating new markets and sustaining current ones. It will also encourage ownership among internal stakeholders hence improved service delivery which is a recipe for increased market share.

7.1 Areas for Further Research

Based on this fact among others, it is therefore, recommended that a broad based study covering all key strategic factors be done to establish their effect on market share. It is also suggested that future research should focus on the moderating effect of government policy and prevailing economic factors on the relationship between the strategic factors and market share of telecommunications in Kenya.

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