COMPETITIVE STRATEGIES ADOPTED BY NATIONAL ENGLISH RADIO STATIONS IN KENYA

BY

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DECLARATION

This research project is my original work and has not been presented for any degree in this university or any other institution of higher learning. No part of this work will be reproduced, stored in retrieval system or transmitted in any form or any means without prior permission of the author and /or the University of Nairobi.

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DEDICATION

This project has been dedicated to my parents, Mr. and Mrs. Mutua for their continuous belief in the power of education and for both financing and supporting me through prayers in all my education efforts.

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LIST OF ABBREVIATIONS

BBC	British Broadcasting Corporation
CCK	Communications Commission of Kenya
FM	Frequency Modulation
KBC	Kenya Broadcasting Corporation
MBA	Master of Business Administration
NCS	National Communications Secretariat
TV	Television
WTO	World Trade Organization

ABSTRACT

Radio plays a major role in dissemination of information as well as a source of entertainment across all generations. The size and nature of the marketplace for radio in Kenya has enlarged significantly since 2000, with 34 new stations coming on-air, bringing the total in 2005 to 49. There are now a number of radio stations serving different ethnic groups and major religions in the country, and the interests of the youth now being targeted by stations. English radio stations have a more national outlook than any other stations in Kenya. This is so because English is the official language in Kenya. Radio listener-ship in the country is quite high and is bound to grow as radio remains the most affordable information gadget to majority of Kenyan population.

This study was aimed at investigating competitive strategies adopted by National English radio stations in Kenya. The objectives of this study were to establish the competitive strategies adopted by the National English radio stations in coping with the challenges of increased competition in the industry and challenges posed by the competition to these radio stations operating in Kenya. The research design adopted was descriptive. A census survey was done for all the eleven operating National English radio stations in Kenya. Primary data was then collected using semi-structured questionnaires. The questionnaires were personally delivered to four managers from each of these radio stations and later collected.

The findings of the study revealed that National English radio stations have adopted various strategies in their operation in order to remain competitive. The most common strategies in play to most of these stations are differentiation and focus strategy. Cost leadership strategy is not much effective as prices of various services are determined by market forces. Despite strategy adoption the study found out that all radio stations across encounter numerous challenges. Most of these challenges cut across all radio stations while others appeared to be unique to particular radio stations.

CHAPTER ONE: INTRODUCTION

1.1 Background

1.1.1 Strategy

There is no single, universally accepted definition of strategy and thus the word has been used differently by various authors and managers. Some include goals and objectives in their definitions while others make firm distinctions between them. Strategy is a multi-dimensional concept which embraces the overall purpose of an organization. All these dimensions are meaningful and relevant and contribute to a better understanding of strategic tasks. Various authors have defined strategy in different ways with many definitions attempting not only to define what a strategy is, but also containing information regarding how a strategy is created and what it is expected to achieve.

Mintzberg et al (2002) perceive strategy as a pattern or a plan that integrates an organization's major goals, policies and action into a cohesive whole. Grant (2000) states that strategy means working hard to understand a customer's inherent needs and then rethinking what a category of product is all about. It is the match between an organization's resources and skills and the environmental opportunities, the risks it faces and the purpose it wishes to accomplish.

A strategy is a long term plan of action designed to achieve a particular goal, most often winning (Thompson et al, 2007). Strategy is differentiated from tactics or immediate actions with resources at hand by its nature of being extensively premeditated and often practically rehearsed. Strategy is a deliberate search for a plan of action that will develop a business's competitive advantage and compound it.

Strategy consists of competitive moves and business approaches to produce successful performance. It is the management's game plan for running the business, strengthening the firm's competitive position, satisfying customers and achieving performance targets. Strategy is all about combining activities into a reinforcing system that creates a dynamic fit with the environment (Grant, 2000). This reinforcing system creates the requisite fit between what the firm needs and what its activities are. Porter (1998) has defined strategy as a creation of a unique and vulnerable position of tradeoffs in competing involving a set of activities that nearly fit together and is consistent.

Strategy is useful in helping managers tackle the daily problems that face organizations and thus ensure survival. It is a tool that offers significant help for coping with turbulence confronting many firms (Aosa, 1998). Various strategists and organizations have used many different approaches to strategy formulation to achieve a variety of strategic objectives. As a result, organizations, consultants and academicians have over time, given the concept of strategy different situation specific definitions. These definitions may be appropriate for a specific situation but rarely does one definition fit all of them. To overcome the confusion created by this phenomenon, we should draw a clear distinction between a strategy, the process by which a strategy is created and its expected results.

The use of generic strategies has been questioned by several commentators claiming they lack specificity, flexibility and are limiting. In many cases trying to apply generic strategies is like trying to fit a round peg into one of three square holes in which case you might get the peg into one of the holes but it will not be a good fit. Miller (1992) questions the notion of being caught in the middle. He claims that there is a viable middle ground between strategies. Many companies, for example, have entered a market as niche players and gradually expanded.

1.1.2 Competitive strategy

Competitive strategy consists of all those moves and approaches that a firm has and is taking to attract buyers, withstand competitive pressure and improve its market position (Thompson & Strickland, 2002). It concerns what a firm is doing in order to gain a sustainable competitive advantage. Porter (1980) outlines the three approaches to competitive strategy, these being striving to be the overall low cost producer (low cost leadership strategy), seeking to differentiate one's product offering from that of its rivals (differentiation strategy) and lastly focus on a narrow portion of the market (focus or niche strategy)

The cost leadership strategy emphasizes efficiency (Porter, 1980). By producing high volumes of standardized products, the firm hopes to take advantage of economies of scale and experience curve effects. The product is often a basic no-frills product that is produced at a relatively low cost and made available to a very large customer base. Maintaining this strategy requires a continuous search for cost reductions in all aspects of the business. The associated distribution strategy is to obtain the most extensive distribution possible. Promotional strategy often involves trying to make a virtue out of low cost product features.

Differentiation involves creating a product that is perceived as unique (Porter, 1980). The unique features or benefits should provide superior value for the customer for the strategy to be successful. Since customers see the product as unrivaled and unequaled, the price elasticity of demand tends to be reduced and customers become more brand-loyal which provides considerable insulation from competition. However there are usually additional costs associated with the differentiating product features and this could require a premium pricing strategy.

In focus strategy (niche strategy) a firm concentrates on a select few target markets (Porter, 1980). Focusing your marketing efforts on one or two narrow market segments and tailoring your marketing mix to these specialized markets can better meet the needs of that target market. The firm typically looks to gain a competitive advantage through effectiveness rather than efficiency and this is most suitable for relatively small firms but can be used by any company. As a focus strategy it may be used to select targets that are less vulnerable to substitutes or where competition is weakest to earn above-average return on investments.

An effective competitive strategy depends on close alignment with engagement and content strategies. Knowing what users want and knowing the value of your content will define how you commercialize your offering (Porter, 1980). An organization's strategy must be appropriate for its resources, environmental circumstances and core objectives.

The process involves matching the company's strategic advantages to the business environment the organization faces. One objective of an overall corporate strategy is to put the organization into a position to carry out its mission effectively and efficiently. A good corporate strategy should integrate an organization's goals, policies, and action sequences into a cohesive whole and must be based on business realities. Business enterprises can fail despite excellent strategy because the world changes in a way they failed to understand (David, 2000). Strategy must connect with vision, purpose and likely future trends.

1.1.3 Overview of Radio stations in Kenya

The size and nature of the marketplace for radio has enlarged significantly since 2000, with 34 new stations coming on-air, bringing the total in 2005 to 49 (Republic of Kenya, 2006b; CCK, 2005b). In particular, there has been an increase in vernacular-language stations, and the proliferation of these stations reflects a push towards addressing the various interests groups in the country. There are now a number of radio stations serving different ethnic groups and major religions in the country, and the interests of the youth (the largest segment of the population) are now being targeted by stations such as Kiss FM and others.

Radio listener-ship in the country is quite high. In an Inter-Media survey, it was found that 91% of the population had listened to the radio in the past seven days (InterMedia, 2005). The upsurge of stations is a result of liberalization of the airwaves, and listeners now have a wide range of listening choices, particularly entertainment services. Regionally-based vernacular language stations previously considered a threat to state security now abound and continue to open. Most are commercially-oriented and many have 80% of their content focused on non-serious entertainment issues, resulting in a need for radio to become more informative and balanced between information and entertainment.

The media industry is marked by extensive cross-media ownership with certain media houses owning several newspapers and magazines, television stations and radio stations.

The political transition from a British colony to an independent country was mirrored by changes in the mass media in Kenya. In 1963 when Kenya became independent the vast majority of broadcasts on government-owned radio station were a replica of British and American programs. This changed gradually and home made programs promoting Kenyan culture made entry into the mass media under the presidency of Jomo Kenyatta as more programs were broadcast in Swahili and there was a focus on African music and dance

Kenya's communications market began full liberalization in 1999, when policy and regulatory functions were de-linked from mainstream operation. As a result, the Communications Commission of Kenya (CCK), an independent regulatory authority, and the National Communications Secretariat (NCS), a policy advisory arm, were created. Under the *Kenya Communications Act No 2 of 1998*, CCK was mandated to license and regulate the communications sector. The Commission is financially and administratively independent, transparent in its processes and protects the rights of both operators and consumers. This is meant to ensure that operators make reasonable return on their investment while giving customers value for money.

In connection with powers and responsibilities vested on it by the communications act, CCK must be able to confirm that stations comply with the relevant provisions of the Radio Regulations. For that purpose, CCK conducts unscheduled inspections of stations. The Commission collates industry statistics and other information to assist new market entrants with the basic information required to make commercial decisions. The data is also utilized by researchers, the media and other stakeholders

The cumulative number of FM frequencies assigned by 30th June 1999 was 79.
The number of FM frequencies assigned for the period up to September 2005 was 244 http://www.cck.go.ke/home/index.asp, visited on 14/08/2008. The Kenya Broadcasting Corporation (KBC) is the largest broadcasting organization in Kenya and the only service with nationwide coverage and it is owned by the government. It is a public broadcaster

which is controlled by the state. It used to be paid for by taxpayers but now generates its own revenue through advertising.

Currently, there are more than 60 FM radio stations in Kenya. This number includes international/foreign, national, regional and community radio stations. Most of these stations are commercial but include programs on entertainment, including talk shows, phone-ins and music. The main national radio stations operating in Kenya and broadcasting in English or Kiswahili are Kenya Broadcasting Corporation (KBC) Kiswahili and English service, Capital FM, Easy FM, Metro FM, Kiss 100, Radio Citizen, Classic 105, Radio 316, Radio Waumini and Hope FM. There are other radio stations that broadcast in local languages, some of them based in Nairobi while others are based in other towns in the country. Examples of these stations are Kameme FM, Ramogi FM, Kass FM, Coro FM and Mulembe FM. These radio stations are usually given different frequencies to operate with. Some of them such as Radio Citizen and KBC broadcast in the whole country (national) while others operate just within a small area, for example, Kass FM.

Permits issued by the Ministry of Information and Communications to prospective broadcasters specify the type of broadcasting service (TV and/or sound) and the permitted coverage areas (i.e. region, province or nationwide coverage). The government has also authorized 5 foreign radio stations to operate in Kenya. The liberalization has resulted in a very vibrant broadcasting industry in Kenya, especially FM sound broadcasting, with the demand for broadcasting frequencies outstripping the supply especially in urban areas. As of now, over 264 FM frequencies have been assigned countrywide; a number of these broadcasting stations are already on air.

1.2 Statement of the research problem

An organization's strategy consists of the moves and approaches devised by management to produce successful organization performance. A strategy is thus a management game plan for the business (Thompson et al, 2007). The essence of formulating a competitive strategy is to relate a company to its environment (Porter, 1998). Following the current opening up of the Kenyan market by the government, the country has witnessed a fundamental change in the competitive environment. The competition is broadly local as well as foreign.

According to Ansoff and McDonnell (1990), it is through strategic response that a firm will be able to relate itself to the environment to ensure its success and also secure itself from surprises brought about by the changing environment. The stiff competition in the media sector with entry of other players competing for same service, especially the ones with economies of scale have left the smaller enterprises in the field to institute competitive strategies to guarantee their performance. Currently there is a cut throat competition which has seen some information provider companies being placed under receivership or even sold out and it is only with competitive strategies being put in place that will guarantee the acceptable performance of the radio stations.

Many local studies have been done in the area of competitive strategies on different segments of the media. For instance, Sang (2001) focused on competitive intelligence practices by FM stations in Kenya; Mbuthia (2003) did a survey on advertising agencies in Kenya while Mungai (2006) did a survey on the competitive strategies by mainstream daily print media firms in Kenya. There were other studies by Kandie (2002) and Kiptugen (2003) that show the effects of environmental changes to firms in specific industries. However, there is no study which has focused specifically on the competitive strategies adopted by the National English radio stations in Kenya and the effects competition has on their operational activities and management styles. This promoted the need to do an investigative study on this field. This study will not focus on the international/foreign, Swahili, regional, community and vernacular radio stations operating in Kenya. This research will form a base of reference for whoever wants to expound on this topic.

Karanja (2002) found out that the most popular type of competitive strategy employed by real estate firms was on the basis of differentiation. The study further found out the major challenges facing these firms to be the rising level of interest rates and inflation. These studies points out those local firms apply competitive strategies that are unique and sector specific; hence, cannot be generalized.

It is evident from these studies that firms in each respective industry adopt different competitive strategies which are unique in each context. There is need therefore to formulate studies to provide an understanding on adoption of competitive strategies by the National English radio stations and see if any competitive strategies are practiced by the firms to maximize their profits and compete effectively. This study will determine if the industry is dominated by one key player or not, and how the key radio stations use their resources adequately to ward off competition. There is need therefore to specifically focus on the strategies used to respond to competition in the radio industry.

There are some common challenges affecting the radio stations, for instance, political interference, imitation of products, talent retention at top and middle management levels, high costs of production and operation, corruption, poaching of personnel by competitors, uncertainties in the legal environment and insecurity while gathering news.

1.3 Research objectives

i. To establish the competitive strategies adopted by the National English radio stations in coping with the challenges of increased competition in the industry.
ii. To establish the challenges posed by the competition to the National English radio stations operating in Kenya.

1.4 Importance of the study

As mentioned earlier, no study has been done on the competitive strategies adopted by the National English radio stations and thus this will be an investigative study.

This study will provide crucial information to the managers of various radio stations on the state of competition and the strategies other firms are using to compete in the industry.

Managers will be able to use this study as a management reference point for strategy being put in place, both present and future, that will ensure their company's preference over the others and will clearly show justification why different competitive strategies have been put in place.

It will also be of value to management practitioners and consultants as it will provide a corporate lesson of the strategies to be employed and those that need to be discarded and the relative importance of each.

The students of strategic management will learn from the study how to apply strategy in a context of increased competition and a fast changing environment. The academia will gain insights into strategic responses of firms facing competition and a changing environment as well as a foundation for further research.

Those who already own radio stations need to know how well to keep them competitive in this era of stiff competition. Proper insight will give them an added advantage in managing their enterprises. Lastly the potential investors will have in mind what strategies they need to put in place as they prepare to open up radio stations in Kenya.

CHAPTER TWO: LITERATURE REVIEW

2.1 Concept of strategy

All organizations exist in complex commercial, economic, political, cultural and social settings that are always under constant change and affect all the players. It is paramount for a firm therefore to maintain a strategic fit with the environment so as to survive. For their survival, firms must also respond to the dynamism, heterogeneity, instability and uncertainty shown by the environment. Technological innovation, globalization, competition and extreme emphasis on price, quality and customer satisfaction are the drivers in the competitive environment.

Johnson and Scholes (2002) define strategy as the direction and scope of an organization over the long-term which achieves advantage for the organization through its configuration of resources within a challenging environment, to meet the needs of markets and to fulfill stakeholder expectations. Strategy is about answering the following questions: Where is the business trying to get to in the long-term (direction)? Which markets should a business compete in and what kinds of activities are involved in such markets (Markets; scope)? How can the business perform better than the competition in those markets (advantage)? What resources (skills, assets, finance, relationships, technical competence, and facilities) are required in order to be able to compete (resources)? What external, environmental factors affect the businesses' ability to compete (environment)? What are the values and expectations of those who have power in and around the business (stakeholders)?

Strategies exist at several levels in any organization ranging from the overall business through to individuals working in it. Corporate strategy is concerned with the overall purpose and scope of the business to meet stakeholder expectations (Johnson and Scholes, 2002). This is a crucial level since it is heavily influenced by investors in the business and acts to guide strategic decision-making throughout the business. Corporate strategy is often stated explicitly in a mission statement.

Business Unit Strategy is concerned more with how a business competes successfully in a particular market (Johnson and Scholes, 2002). It concerns strategic decisions about choice of products, meeting needs of customers, gaining advantage over competitors, exploiting or creating new opportunities. Operational Strategy is concerned with how each part of the business is organized to deliver the corporate and business-unit level strategic direction (Johnson and Scholes, 2002). Operational strategy therefore focuses on issues of resources, processes and people. Organizations often formulate company strategies, product and service strategies, and strategies that drive operational, support and managerial processes.

A good company strategy has to have at least four components, namely, scope, competence, competitive advantage and synergy. Scope defines companies and business, that is, the present and planned interactions of the company with its environment. Competence is an indication of the level and patterns of the company's competitive advantage. Competitive advantage is the unique position a company will develop vis-à-vis its competitors through its resource deployments and scope decisions. Synergy is the joint effects that are sought from the company's resources deployment and the company scope decisions. It is paramount that a company has to achieve a fit with its environment for it to succeed.

Strategy serves as a vehicle for achieving consistent decision making across different departments and individuals. Hamel and Prahalad (1989) view organizations as composed of many individuals all of whom are engaged in making decisions that must be coordinated. For strategy to provide such coordination, the strategy process acts as a communication mechanism within the firm. The shift of responsibility of strategic planning from corporate planning departments to line managers and the increased emphasis on discussion (as opposed to the formal approval of written plans) are part of this increased emphasis on strategic planning as a process for achieving coordination and consensus within companies (Buzzell and Gale, 1989).

Radio stations are environment dependent, having their inputs from the environment and after transformation, discharging their outputs into the same environment. The environment consists of all variables that form the context within which firms exist. According to Schendel and Hofer (1979), organizations respond to turbulence in the environment by formulating new strategies. These provide directional cues to the organization that permit it to achieve its objectives while responding to the opportunities and threats in the environment. Pearce and Robinson (1991) argue that the organization has to respond to the turbulence by crafting new strategies that they define as a large-scale future –oriented plans for interacting with the environment.

Strategy is an executable plan of action that describes how an organization will achieve a stated mission. Organizations often formulate company strategies, product and service strategies, and strategies that drive operational, support and managerial processes. Competitive strategy concerns what a firm is doing in order to gain a sustainable competitive advantage. Porter (1980) outlines three approaches to competitive strategy, which lead to the Porter's generic strategies. These models are: low cost leadership strategy, differentiation strategy and focus strategy.

2.2 Strategy and competition

According to Mintzberg et al (2002), there are five P's of strategy: strategy as a plan, ploy, pattern, position and perspective with some of their interrelationships being considered. Schendel and Hofer (1979) explain strategy as a match between an organization's resources, skills, environment opportunities, risk and purpose it wishes to accomplish.

Porter (1998) provided a framework that models an industry as being influenced by five forces. These forces are degree of rivalry, threat of substitutes, barrier to entry, buyer power and supplier power. This model of pure competition implies that risk-adjusted rates of return should be constant across firms and industries. Numerous economic studies have however shown that different industries are able to sustain different levels of profitability, part of this difference being explained by industry structure.

Degree of rivalry includes aspects such as exit barriers, industry concentration, fixed costs/value added costs, industry growth as well as intermittent capacity. When we talk of threat of substitutes, we consider switching costs, buyer inclination to substitutes and price performance trade-off of substitutes. Buying power is the impact the customers have on a producing industry. Here, we look at the bargaining leverage, buyer volume, buyer information, brand identity, price sensitivity, threat of backward integration and product differentiation.

The supplier power is determined by supplier concentration, importance of volume to the supplier, differentiation of inputs, impact of inputs on cost or differentiation, switching costs of firms in the industry, presence of substitute inputs, threat of forward integration and cost relative to total purchases in the industry. Barriers to entry/threat to entry is determined by absolute cost advantages, proprietary learning curve, access to inputs, government policy, economies of scale, capital requirements, brand identity, switching costs, access to distribution, expected retaliation and proprietary products.

The strategic business manager in a radio station seeking to develop an edge over rival radio stations can use this model to better understand the industry context in which the firm operates. The nature and fascination of business is that it is not static and thus while we are prone to generalize and assume dominance of some firms in an industry; we have also seen such industry change. Of late, firms are merging and forming strategic alliances that re-map the information terrain. There has been an attempt therefore to move the understanding of industry competition from a static economic or industry organization model to an emphasis on the interdependence of forces as dynamic or punctuated equilibrium.

2.3 The concept of competitive strategy

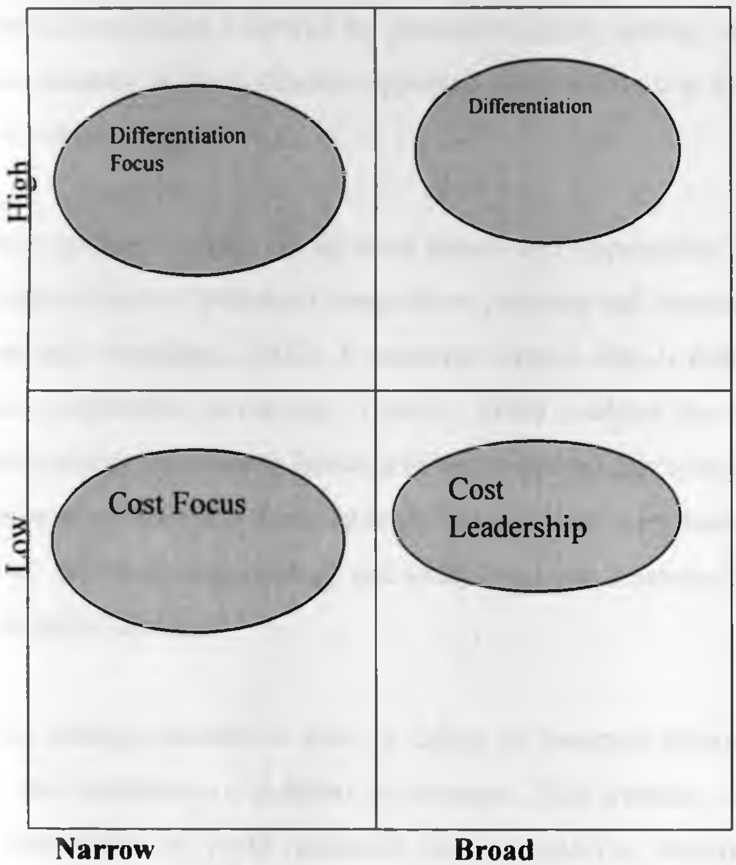
"Competitive strategy is about being different. It means deliberately choosing a different set of activities to deliver a unique mix of values" (Mintzberg et al 2002: 18). Mintzberg et al (2002) give an example of Southwest Airlines Company which offers short-haul, low-cost, point-to-point service between midsize cities and secondary airports in large cities. This company avoids large airports and does not fly great distances.

Porter (1998) describes competitive strategy as the search for a favorable competitive position in an industry, the fundamental arena in which competition occurs and further explains that competitive strategy aims to establish a profitable and sustainable position against the forces that determine industry competition. This involves identifying sources of competition in the ever changing environment then developing strategies that match organizational capabilities to the changes in the environment. According to Porter (1998), competitive strategy is about being different meaning deliberately performing activities differently and in better ways than competitors.

2.3.1 Porter's generic strategies

According to Mintzberg et al (2002). Porter's framework of generic strategies has been used widely and he believes there are but two basic types of competitive advantage that a firm can possess; that is low costs or differentiation. When these combine with the scope and a firms operation the product is three generic strategies for achieving above average performance in an industry: cost leadership, differentiation and focus (namely, narrow scope).

Figure 1: Porter's cost and differentiation model



Scope of Business Activities

SOURCE: Porter, M. E. (1998). Cluster and the new economics of competition. *Harvard Business Journal*, Vol. 12, 95 -117. p.24

However. Gilbert and Strebel (1989) have disagreed with this and argued that highly successful companies adopted outpacing strategies where they start with low cost strategy to secure markets and then later apply proactive differentiation to capture certain important market segments. To support their arguments they have given an example of some Japanese automobile manufacturers. They continue to argue that other firms begin with value differentiation followed by preemptive price cutting. Ansoff (1990) defined competitive strategy as the distinctive approach which a firm uses or intends to employ in order to succeed in the market.

Competitive strategy consists of all those moves and approaches that a firm has and is taking to attract buyers, withstand competitive pressure and improve its market position (Thompson and Strickland. 2002). It concerns what a firm is doing in order to gain a sustainable competitive advantage. (Porter. 1980) outlines the three approaches to competitive strategy these being Striving to be the overall low cost producer, i.e. low cost leadership strategy, secondly Seeking to differentiate one's product offering from that of its rivals, i.e. differentiation strategy and lastly Focus on a narrow portion of the market, i.e. focus or niche strategy.

Competitive strategy enables a firm to define its business today and tomorrow, and determine the industries or markets to compete. The intensity of competition in an industry determines its profit potential and competitive attractiveness. Competitive strategy will assist a firm in responding to the competitive forces in these industries or markets (from suppliers, rivals, new entrants, substitute products, customers). Competitive strategies will be vital to a firm while developing its fundamental approach to attaining competitive advantage (low price, differentiation, niche), the size or market position it plans to achieve. and its focus and method for growth (sales or profit margins, internally or by acquisition) (Gathoga . 2001).

Superior performance can be achieved in a competitive industry through the pursuit of a generic strategy, which includes an overall cost leadership, differentiation. or focus approach to industry competition. If a firm does not pursue one of these strategy types, it will be stuck-in-the-middle and will experience lower performance when compared to firms that pursue a generic strategy. Porter (1980) argues that strategy is about selecting the set of activities in which an organization will excel to create a sustainable difference in the market place.

According to Day and Wensley (1988), two categorical sources involved in creating a competitive strategy are superior skills and superior resources. According to (Barney, 1991) not all firm resources hold the potential of sustainable competitive advantage; instead, they must possess four attributes: rareness, value, inability to be imitated, and inability to be substituted.

Rapid technological change has created a new business environment where innovation has become a top competitive strategy. According to Ansoff and McDonnell (1990), increased competition has created fundamental shift in economic environment whereas no organization can hope to stay afloat if it fails to come up with proper strategic responses. Terminologies such as retrenchment, mergers, rightsizing and cost reduction have become a routine for survival means.

Competitive pressures are forcing corporations to adopt new flexible strategies and structures. Many of these are familiar, for instance, acquisition and divestitures aimed at more focused combination of business activities, reduction in management staff and increased use of performance based rewards. Grant (2000) says that the concept of organizational restructuring or reorganization is all about changing the organization, the equivalent of self-administering surgery with no insurance, no anesthetic and no assurance of long-term health.

Pearce and Robinson (2000) state that there is need to adopt new strategies that match the challenges from the environment. Reengineering, downsizing, self-management and outsourcing are some of the dominant strategies that have been used for restructuring in the 1990's. Ansoff and McDonnell (1990) assert that the management system used by a firm is a determining component of the firm's responsiveness to environment changes because it determines the way that management perceives the environment, diagnoses their impact on the firm, decides what to do and implements the decisions.

According to Burnes (1998), the concern in real time responses is to minimize the sum to total losses and restore profitability to ensure organization's success in a turbulent and surprising environment. He also observed that unstable and unpredictable conditions in which organizations have to operate today means that the ability to think strategically and manage strategic change successfully is key competitive strength for a sustainable competitive advantage. Real time strategic issue responses are necessary to facilitate the firm's preparedness in handling the impending issue, which may have profound impact on the firm.

Every organization has to develop strategies that will enable it to fit within the environment it operates in. This is necessary because the environment is dynamic, multi-faceted and complex; as a result of which organizations have to plan how to respond to the challenges posed by it. An organization can either plan on how to cope with the many changes brought about by the environment or handle them as they emerge.

In view of the foregoing, strategies to be adopted within the media industry especially radio stations should reflect and underscore the macroeconomic, social, political events in Kenya as well as the increasing pressure of globalization, liberalization and fair trade practices as advocated by the world trade organization (WTO) and policies within and outside the sector in determining its key elements. According to Johnson and Scholes (2002), managerial decisions with respect to operational planning and control are narrow and short-term by comparison with the strategic issue that are broad with a typically long-term frame depending on the specific industry.

Hill and Jones (2001) assert that by planning, an organization is able to identify problems and plan how to solve them by using appropriate strategies. In the strategic decision making process of organizations, there are three levels of strategy under the strategic responses: corporate level strategy, business level strategy and operational level strategy. At each level of strategy there are responses that have to be adopted to ensure organizational success as follows: -

Increased competition threatens the attractiveness of an industry and reducing the profitability of the players. It exerts pressure on firms to be proactive and to formulate successful strategies that facilitate proactive response to anticipated and actual changes in the competitive environment. Firms therefore focus on gaining competitive advantage to enable them respond to, and compete effectively in the market. By identifying their core competences, firms are able to concentrate on areas that give them a lead over competitors, and provide a competitive advantage. According to Johnson and Scholes (2002), core competences are more robust and difficult to imitate because they relate to the management of linkages within the organizations value chain and to linkages into the supply and distribution chains.

Firms respond to competition in different ways. Some may opt for product improvement, divestiture, and diversification, entry into new markets or even merging or buying out competitors. Porter (1980) argues that the essence of strategy formulation, is coping with competition. A company has competitive advantage whenever it has an edge over its rivals in securing customers and defending against competitive forces (Thompson and Strickland, 2002). Sustainable competitive advantage is born out of core competencies that yield long term benefit to the company.

Hamel and Prahalad (1989) define a core competence as an area of specialized expertise that is the result of harmonizing complex streams of technology and work activity. They further explain that a core competence has three characteristics. It provides access to a wide variety of markets, it increases perceived customer benefits and lastly it is hard for competitors to imitate. Sources of competitive advantage include high quality products, superior customer service and achieving lower costs than its rivals. To succeed in building a sustainable competitive advantage, a firm must try to provide what buyers will perceive as superior value. This entails either a good quality product at a low price or a better quality product that is worth paying more for.

According to Hill and Jones (2001), the principal concern of corporate strategy is to identify the business area in which a company should participate in order to maximize its long-run profitability. When choosing a business area to compete in, a company has several options. It can focus on just one business, it can diversify into a number of different business areas, it can vertically integrate either upstream to produce its own inputs or downstream to dispose off its own output, it can also consider strategic alliances an alternative to vertical integration and diversification. According to Thompson and Strickland (2001), in order to succeed, corporate - level strategies should create value. To create value, a corporate strategy should enable a company or one or more of its business units to perform one or more of the value creation functions in a way that allows for differentiation and a premium price.

Thus a company's corporate strategy should help in the process of establishing a distinctive competence and competitive advantage at the business level. There is therefore a very important link between corporate-level and business level. According to Johnson and Scholes (2002), corporate–level responses is the first level of strategy at the top of the organization concerned with the overall purpose and scope of the organization to meet the expectations of owners or major stakeholders and add value to different parts of the enterprise. This includes issues of geographical coverage, diversity of product / services or business units and how resources are to be allocated between the different parts of the organization. They further stated that the corporate centre plays a crucial role in determining how the organization should be structured, how resources should be allowed in setting targets and reviewing performance, and also add value to different business units within the company. They also observe that corporate level strategy is vital as it is the basis of other strategic decisions. It takes form in an explicit or implicit statement of mission that reflects such expectations.

Diversification has been a common strategy on the part of business organization. At a general strategic level. Ansoff and Mc Donnell (1990) suggest three reasons why firms diversify. First, the objectives can not be achieved by continuing to operate in their existing market. Thus, since continued operation in these markets is not able to satisfy the profit, risk or growth objectives of the business, achievements of this must therefore must be sought in new market area. Secondly, where a business has excess financial resources beyond those necessary to satisfy its expansion plans in its existing market, rather than retain these resources in liquid form, the business may invest them in new market areas. Thirdly, if greater opportunities are presented to the firm in a new market area than accrue from its existing activities, then a diversification program may be undertaken to benefit from these.

The major reason for a business adapting a strategy of diversification is to allow it to reduce its dependence upon a single market area. Firms can reduce some risks involved in operating a single market by diversifying their sources of raw materials and avoiding due dependence upon a small number of customers, as well as maintaining an adequate supply of liquid financial resources. The businesses most vulnerable to the march of events are those concentrated in single, non-evolving (or only slowing evolving technologies) in single product categories, in industries characterized by large aggregates of fixed and inflexible plans and equipments. Such industries as traditional textiles, cement, paper and certain metal-working sectors would appear o fall into this category and for firms in this sector diversification is an important strategy to be considered. Thus, even business which have by all accounts have been successful in their simple chosen market must recognize in time to take appropriate action that sooner or later their continued expansion and perhaps profitability will be dependant upon moving into new market area.

The most frequent reason for diversification in the part of individual business is the achievement of growth and risk reduction. With regards to growth, any firm that attempts to expand within an industry immediately faces two limitations: The rate of growth of the market its self and reactions of its market competitors. Any business seeking to achieve a growth rate about the aggregate rate of expansion of the market which it is currently confined is implicitly or explicitly envisaging an increase in its market share.

Businesses also pursue the diversification strategy to reduce some business risks which such a policy is thought to confer. According to Hill and Jones (2001), for many companies the appropriate corporate level strategy does not involve vertical integration or diversification. Corporate strategy entails concentrating on competing successfully within the confines of a single business. The company can focus its total managerial, technological and physical resources and capabilities on competing in a single area. The strategy is important for a first growing industry where demands on the company's resources and capabilities are likely to be substantial, but where the long term profit that flows from establishing a competitive advantage are also likely to be significant. This means that the company sticks to doing what it knows best and does not make a mistake of diversifying into areas it knows little about and where its existing resources and capabilities add little value.

Hill and Jones (1999) argue that focus strategy concentrates on serving particular market niche which can be defined geographically, by the type of customer or by segment of the product line. It differs from the first two because it is directed towards serving the needs of a limited customer group or a segment. Hence the company is specialized in some way. A focus strategy provides an opportunity for an entrepreneur to find and then exploit the gap in the market by developing an innovate product that a customer cannot do without. The company has enormous opportunity to develop its own niche and compete against low-cost and differentiated enterprises which tend to be larger.

This is the second level thought of in term of business unit strategy and it is concerned with how advantages over competitors can be achieved, what new opportunities can be identified or created in the markets. It differs from corporate strategy in that whereas corporate strategy involves decisions about the entire organization, strategic decision under the business units are basically concerned with how customers' or clients' needs can best be met.

2.4 Sources of competitive advantage

When a firm sustains profits that exceed the average for its industry, it is said to posses a competitive advantage over its rivals. The goal of much of the business strategy is to achieve a sustainable competitive advantage. A company has competitive advantage whenever it has an edge over its rivals in securing customers and defending against competitive forces (Thompson and Strickland, 2002). Sustainable competitive advantage is born out of core competencies that yield long term benefit to the company.

Prahalad and Hamel (1990) define a core competence as an area of specialized expertise that is the result of harmonizing complex streams of technology and work activity. They further explain that a core competence has three characteristics. One it provides access to a wide variety of markets, secondly it increases perceived customer benefits and lastly it is hard for competitors to imitate

A higher profit rate to a company over its rival can be achieved if the company can supply an identical product or service at a cost that is lower or a differentiated one for which the customer will be willing to pay a premium price that is higher than the additional cost of differentiation.

Porter (1980) defined three generic strategies which are cost leadership, differentiation and focus. He views cost leadership and differentiation as mutually exclusive strategies. If a firm attempts to pursue both, it is said to be stuck in the middle and it may have low profitability and a blurred corporate culture coupled with a conflicting set of organizational arrangements and motivation system. Competitive advantage stems from superior value creation through low costs, product differentiation so as to charge a premium price or doing both cost leadership and differentiation at the same time. Competitive advantage is supported by efficiency, quality, innovation and customer responsiveness.

A company will be able to earn a higher rate of profit above the industry average if it possesses valuable distinctive competencies. Companies need to pursue strategies that build on their existing resources and capabilities and the strategies formulated should build additional resources and capabilities for them to achieve competitive advantage. The durability of competitive advantage for any company is dependent on the height of barriers to imitation, the capability of competitors and the dynamism of the environment.

Erosion period is where the competitive advantage held by the firm is eroded due to imitation, duplication, new technology and attacks by rivals. Competitive strategy consists of all those moves and approaches that a firm has and is taking to attract buyers, withstand competitive pressure and improve its market position (Thompson and Strickland, 2002). It concerns what a firm is doing in order to gain a sustainable competitive advantage. Thompson and Strickland (2002) are of the opinion that a company has competitive advantage whenever it has an edge over its rivals in securing customers and defending against competitive forces.

According to Thompson and Strickland (2002), a competitive advantage has a three stage life cycle: build up period, where strategic moves are successful in producing competitive advantage; benefit period where fruits of competitive advantage are enjoyed, the firm earns profits and recoups on investments made to create the advantages; and finally erosion period where the competitive advantage held by the firm is eroded due to imitation, duplication, new technology and attacks by rivals.

To succeed in building a sustainable competitive advantage, a firm must try to provide what buyers will, perceive as superior value. This entails either a good quality product at a low price, or a better quality product that is worth paying more for. Porter (1990) has hypothesized, why some nations were more competitive than others. As well as being able to successfully maneuver through the environment, he identified that the foundation of success lay in the diamond of home advantage. To successfully launch an international challenge he identified four home prerequisites. These are maximum use of endowed resources (natural and human), forming of domestic networks to fully exploit these resources, domestic demand and an industry and environmental structure in order that these forces can thrive.

In Porter's analysis, industry competitors can be threatened by new or potential entrants and substitutes. In systems, barriers to new entrants can exist, as well as barriers to international competitiveness. These barriers can be related to technical characteristics of commodities, perishability, bulkiness, production characteristics, economies of scale, laws, rules and standards. In industrial products, many factors go into making up the competitive advantage of a supplier. These factors are primarily related to size and patterns of food demand, microeconomics and sector policies.

Mintzberg (1991), points out that not all realized strategy is intended. Realized strategy is often emergent in nature. Strategy emerges out of an organization's day to day activities. The organization does not have any objectives to pursue but as it goes along its daily activities, the dynamic external environmental forces inevitably impact on its operations and at that point the management formulates a strategy for the organization. Emergent strategy is therefore based on responses to emerging opportunities and threats (Mintzberg, 1991). They are a result of deliberate decisions to focus resources in order to pursue a new direction whilst modifying some aspects of earlier strategic intent.

2.5 Challenges in application of competitive strategies

If a firm attempts to achieve an advantage on all fronts, in this attempt it may achieve no advantage at all. For example, if a firm differentiates itself by supplying very high quality products, it risks undermining that quality if it seeks to become a cost leader. Even if the quality does not suffer, the firm would risk projecting a confusing image. For this reason, Porter (1998) argued that to be successful over the long-term, a firm must select only one of these three competitive strategies. Otherwise, with more than one single competitive strategy the firm will be stuck in the middle and will not achieve a competitive advantage (Miller, 1992).

Porter (1998) argued that firms that are able to succeed at multiple strategies often do so by creating separate business units for each strategy. By separating the strategies into different units having different policies and even different cultures, a corporation is less likely to become stuck in the middle.

However, there exists a viewpoint that a single competitive strategy is not always best because within the same product customers often seek multi-dimensional satisfactions such as a combination of quality, style, convenience, and price. There have been cases in which high quality producers faithfully followed a single strategy and then suffered greatly when another firm entered the market with a lower-quality product that better met the overall needs of the customers.

2.6 Criticisms of competitive strategies

Several commentators have questioned the use of competitive strategies claiming they lack specificity, flexibility and are limiting. In many cases trying to apply competitive strategies is like trying to fit a round peg into one of three square holes in which case you might get the peg into one of the holes, but it will not be a good fit (Miller, 1992).

In particular, Miller (1992) questions the notion of being caught in the middle. He claims that there is a viable middle ground between strategies. Many companies, for example, have entered a market as niche players and gradually expanded. The competitive strategies are criticized in the sense that most times they are costly, time consuming, requiring complex implementation and some easily copied by the rivals.

CHAPTER THREE: RESEARCH METHODOLOGY

3.1 Research design

This was a descriptive survey aimed at establishing the competitive strategies that the management of different National English radio stations adopt to cope with competition in Kenya. A survey research collects data from a broad number of members of a population which facilitates comparisons and this study undertook to compare various strategies of population members with respect to the competitive strategies they used. The research was carried out through a census survey.

3.2 Population

The population of interest consisted of all National English Radio stations operating in Kenya. All the National English radio stations were studied by a census and this was because there were only a few (see appendix 3 attached) National radio stations that broadcast in English. The study was concerned with the competitive strategies adopted by National English Radio stations to cope with competition in Kenya.

3.3 Data collection

The main instrument in data collection was a semi-structured questionnaire (see appendix 2 attached) used via in-depth interviews to obtain the required data. These questionnaires were delivered through personal visits and administered, where possible through a one to one interview. Where this was not possible, a questionnaire was dropped and picked later or emailed to the targeted respondents. Those targeted were Chief Executives/Managing Directors. Finance Managers, Marketing Managers and Station Managers. This method was used since it did not restrict respondents on answers and had potential of collecting more detailed information. The method was also appropriate since only the targeted managers were asked to fill the questionnaire. Personal Interviews provided the interviewer with an opportunity to probe and obtain clarification where answers given were unclear and this enhanced the accuracy of the information.

3.4 Data analysis

Data collected was quantitative in nature and was analyzed using SPSS software (statistical package for social sciences). Descriptive statistics included the mean score, standard deviation and frequency distribution. Frequency distribution enabled the researcher to meaningfully describe the distribution of measurement. The mean score was used to determine the most common strategies used by the National English radio stations. The information was displayed by use of bar charts, graphs and pie charts.

CHAPTER FOUR: DATA ANALYSIS AND FINDINGS

4.1 Introduction

This chapter gives a detailed analysis of the data collected and presents the findings. The study carried a census survey of all eleven National English radio stations where four managers from each radio station were presented with questionnaires.

Response rate

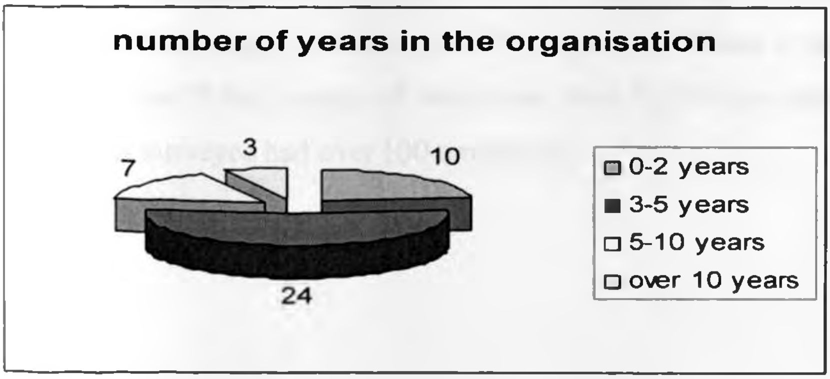
The survey attracted a response rate of 100 percent this can be attributed to the nature of study. Ample time was dedicated to data collection as census population was small and manageable.

4.2 Organization's general information

4.2.1 Number of years since joining the organization

The number of years of operation in an organization is crucial since a respondent is in a position to recount the strategies adopted by that particular radio station over time in order to survive in the industry. This section sought to find out the duration of the respondent in the organization.

Figure 2: Number of years in the organization



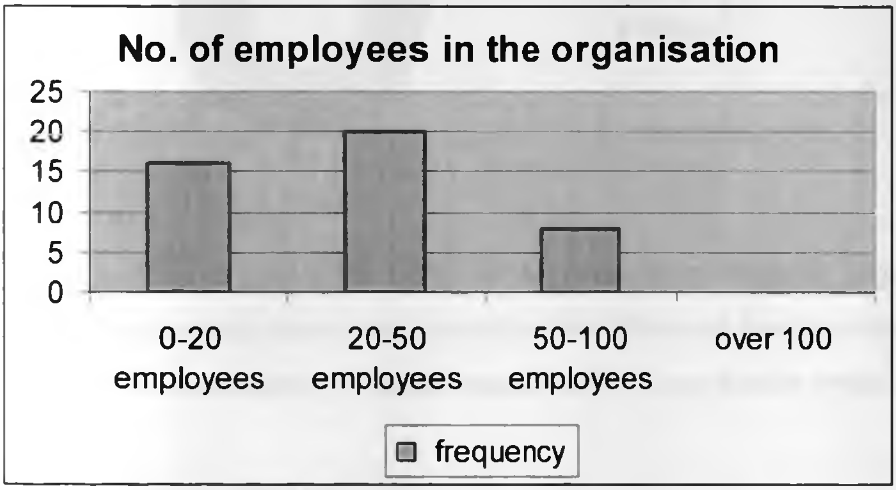
Source: Research data

The above figure indicate that 10 respondents had between 0-2 years in their organization,24 had between 3-5 years ,7 had between 5-10 years and on the other hand 3 had over 10 years in the organization under study. From these findings it can be seen that most of these respondents had been well exposed to strategies adopted in their respective departments.

4.2.2 Number of employees

The researcher chose to use the number of employees as a measure of size. Respondents were provided with a list of employee numbers to choose from. The results are summarized in the table below.

Figure 3: Number of employees in the organization



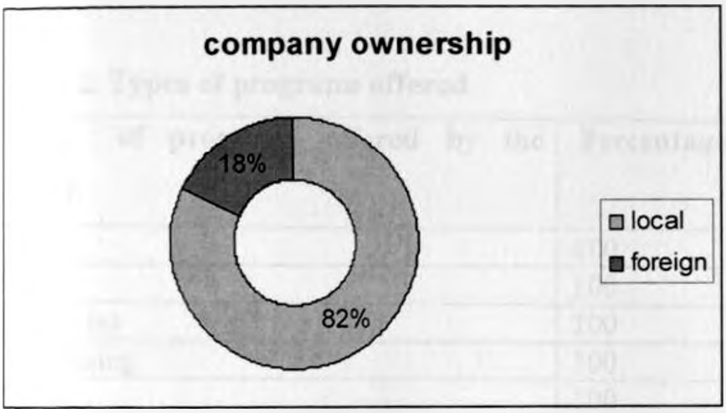
Source: Research data

As can be affirmed from analysis above, 15 respondents indicated their stations had a total population range of between 0 to 20 employees; 20 had a range of between 20 to 50 employees and 9 had a range of employees from 50-100 per station. Moreover, none of the stations surveyed had over 100 employees.

4.2.3 Organization ownership

The figure below summarizes the results as pertains to ownership.

Figure 4: Company ownership



Source: Research data

The above figure shows that 82% of the respondent National English radio stations involved in the study were locally owned while 18% were foreign owned. It can therefore be concluded that majority of radio stations in Kenya are locally owned.

4.2.4 Number of directors

The number of directors varied from one radio station to the other. From the findings the number also depended on the size of the radio station. From the table below, 63.6% of the respondents reported to be headed by between 3-4 directors, 18.1% between 0-2 directors and 18% by between 5-10 directors. It can be concluded therefore that most of the National English radio stations are steered by a team of between 3-4 directors.

Table 1: Number of directors

Number of directors	Percentages
Between 0-2	18.1
Between 3-4	63.6
Between 5-10	18
Over 10	0

Source: Research data

4.2.5 Types of programs offered by the stations

The objective of this section was to establish the types of programs aired by the stations. The respondents were provided with a list of programs and were expected to tick appropriately.

Table 2: Types of programs offered

Types of programs offered by the station	Percentages	Means	Std.deviation
Music	100	1.0	0
News	100	1.0	0
Phone- ins	100	1.0	0
Advertising	100	1.0	0
Sports	100	1.0	0
Humors	90.9	1.0	0
gospel	63.6	1.0	0
Greetings	45.5	1.0	0
Commercial recording	37	1.2	0.4

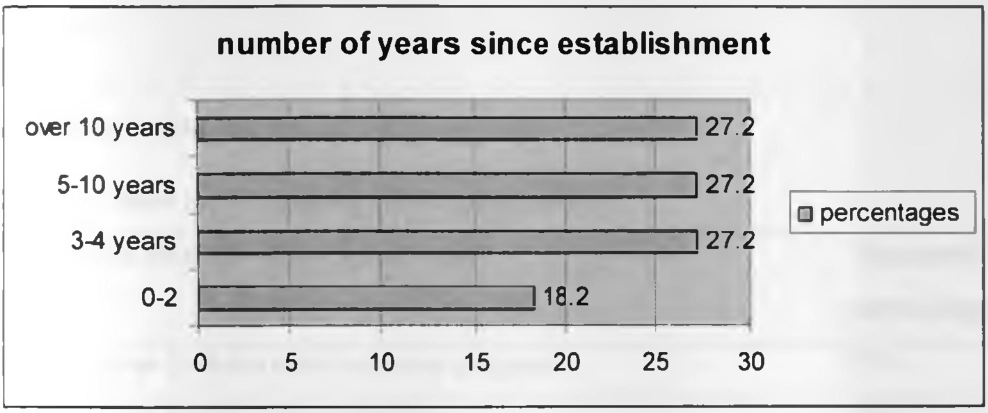
Source: Research data

From table 2 above, the findings confirmed that majority of stations offered music, news, phone-ins, advertising, sports, humor, gospel, and greetings as they all attained a mean of 1.0. Commercial recording deviates from the mean as indicated by the standard deviation meaning that it was the only program that not common to all stations. However it is also noted that despite the similarities there exists unique specialization in these programs by individual stations.

4.2.6 Stations' period of existence

Period of existence is very important as it is a good indicator an effective strategy use in station operations. Recent entrants in the market also tell much more about a particular industry.

Figure 5: Number of years since establishment



Source: Research data

The study findings established that an equal proportion of 27.2% of the radio stations were established between 3 to 4 years, between 5 to 10 years and over 10 years. 18.2% were established from the period between 0 to 2 years. Majority of stations under the study had over three years since inception. This strongly explains the level of strategy adoption over time by these organizations to remain competitive.

4.2.7 Station engaging in other business

Table 3: Engagement in other businesses

Response rate	Frequency	Percentage
Yes	36	81.82
No	8	18.18
Total	44	100.0

Source: Research data

A proportion of 81.82 % of the respondents confirmed that their station is engaged in other businesses besides broadcasting. While 18.18% said no, meaning that their firm never engaged in other business besides broadcasting. They further identified these business activities as newspapers publications, online advertisements, daughter stations, lending of transmitter masts and DJ services and music recordings. It can be concluded that most National English radio stations have employed diversification strategy by engaging in one way or the other in other business besides their core broadcasting business.

4.2.8 How radio stations chose programs

Table 4: How radio stations chose programs

How radio stations chose programs	Response rate in percentages
1.Our station looks at other stations programs	37%
2.Our station looks at other stations programs and copies the style	20%
3.We focus on the needs of the audience	91%

Source: Research data

From Table 4 above, 37% of the respondents indicated that they chose their programs by looking at other station's programs while 20% indicated that their station looks at other stations programs and copies the styles. On the other hand 91% indicated that they focused on the needs of the audience. It is clear from this part of study that majority of the stations' choice of the programs is audience driven, as they endeavor to share the market.

4.2.9 Minimum requirements to operate a radio station

Among the much emphasized requirements to operate a radio station are: necessary broadcasting equipments, frequency, target market /group trained personnel and capital. This part also sought opinion on whether other radio stations in operation offer same services as theirs.

4.3 Strategy formulation.

4.3.1 Formal documentation of mission and vision

Respondents revealed there is an existence of mission and vision statements. This was supported by 100 % yes response. Further this section sought to identify the parties involved in the formulation of mission and vision in these radio stations. Below are the response rate results.

Table 5: Parties involved in formulation of a company's mission and vision statement

Response rate	Frequency	Percentage
Consultants	36	81.8%
Shareholders	12	27.3%
Directors	36	81.8%

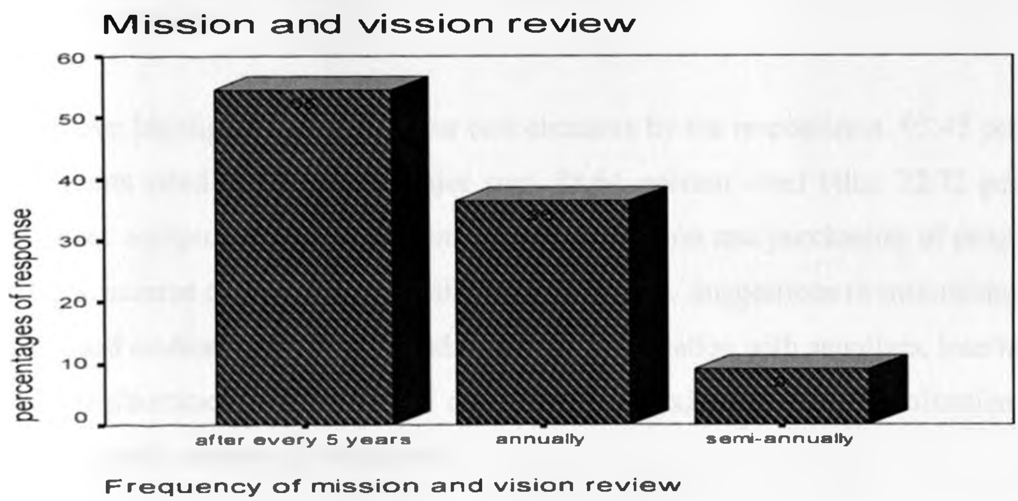
Source: Research data

From the results in table 5, 81.8% of respondents indicated that consultants and directors were both involved in the mission and vision formulation while 27.3% of the respondents said shareholders are involved in the exercise

4.3.2 Frequency of mission and vision statements' reviews

Mission and vision statements are strategy summary statements that guide the function and direction of the firm.

Figure 6: Mission and vision review



Source: Research data

55% of the stations under study reviewed their mission and vision statements after every 5 years, 36% reviewed annually and 9% reviewed quarterly.

4.4 Competitive strategies adopted by English radio stations

4.4.1 Cost leadership strategies - Major cost elements

Cost is a major factor in determining the profitability of any firm. In this regard this section was meant for manager respondents to give their opinion on the major cost elements in their respective stations and how they can be minimized to improve profitability in their firms.

Table 6: Major cost elements

Major cost elements	Response rate in percentage
Salaries	**95.45**
Bills (for example, frequency, electricity etc)	**88.64**
Technological equipments	**72.72**
Costs of production and purchasing of programs.	**68.18**
Recurrent liabilities e.g. rent	**43.18**

Source: research data

Table 6 above highlights the cited major cost elements by the respondents. 95.45 percent of respondents cited salaries as a major cost. 88.64 percent cited bills, 72.72 percent technological equipments, 68.18 percent cost of production and purchasing of programs while 43.18 percent cited recurrent liabilities such as rent. Suggestions in minimizing the costs included co-hosting with other radio stations, negotiation with suppliers, lean firms, and part time/contractual employment of presenters, maximum resource utilization and retaining of small number of employees.

4.4.2 Ways of improving sales

Sales are the main source of income to the National English radio stations in Kenya. How effective a sales system is, is key to success of that firm. Below is a table of response.

Table 7: Ways of improving sales

Response rate	Not important Freq.	Less important Freq	Important Freq	Moderately important Freq	Very important Freq	Mean
Building customer loyalty		4	12		28	**3.6**
Selling to large customers		12	4	20	8	**3.5**
Installing new equipment	12		8	8	16	**3.36**
Offering price discounts	12	3	9	8	12	**3.09**
Employing many staff		33	11			**2.27**

Source: Research data

It can be seen from the above mean analysis that a majority constituting a mean of 3.6 chose building customer loyalty as a suitable way in improving sales for the radio stations. This was followed by selling to large customers (3.5), installing new equipment (3.36), offering price discounts (3.09) and employing many staffs (2.27). It can be concluded that stations employ low cost in their production as they attempt to cut cost by avoiding employing more staff as this would increase cost thereby not achieving cost leadership. It can be concluded that radio stations have adopted sales improving strategy through building of customer loyalty and selling to a large customer, this indicates that radio station aims at attracting and locking its customers through this strategy. However, they have also entrenched cost cutting measures through maintaining small number of staffs.

4.4.3 Price discounts and sensitivity of customers to change in cost of advertising

The researcher intended to establish whether customers ask for price discounts. The table below indicated that 63.6 percent of the respondents said yes to request for price discounts by the customers. This shows that there is low adoption of the low cost strategy by majority stations. This is exemplary supported by the fact that customers request for price discount and sensitivity to changes in cost of advertising by customers observed across the radio stations.

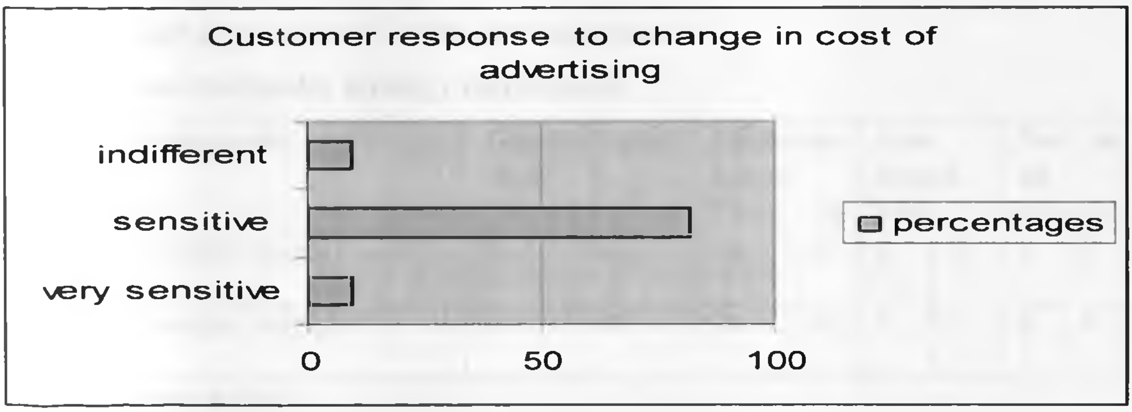
Table 8: Customers request for price discounts

Response rate	Frequency	Percent
Yes	28	63.6
No	16	36.4
Total	44	100.0

Source: Research data

Figure 7 below shows the level of sensitivity to cost of advertising by the customers. 81.8% of the respondents confirmed that their customers were sensitive to the changes in cost while 9.1 percent were very sensitive and indifferent respectively.

Figure 7: Customer response to change in cost of advertising



Source: Research data

4.4.4 Decisions on price setting

Table 9: Parties involved in price setting

Who decides on the price to be charged	Response in percentage
Management	73
Market driven	74
Board of directors	10
Media owners association	0

Source: Research data

Table 9 above shows the parties involved in determining the price to be charged on advertising. Station management has a 73% role in setting the cost, 74 % attributed cost to be market driven while 10% attributed this to directors. The Media Owners Association seems not to have much role in determining the cost of advertising. As indicated through the response in the table, management and market plays a bigger role in setting the cost of advertising. This can be attributed to highly competitive media environment as well as the need to be a low-cost leader in the market.

4.4.5 Extent of organization's strategies employment

Table 10: Low cost leader strategy employment

Strategy employment	Greater extent Freq.	%	Moderate extent Freq.	%	Low extent Freq.	%	Not at all Freq.	%
Low -cost provider strategy	28	64	14	36	0	0	0	0
Best- cost provider strategy	20	45	24	55	0	0	0	0

Source: Research data

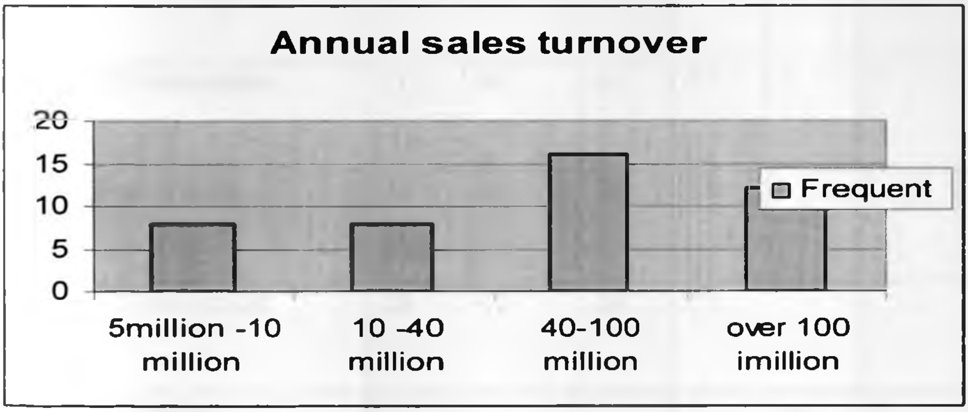
From table 10 above, 28% of the respondents acknowledged that to a greater extent have employed the low-cost strategies in their operations while 20 % of the respondents have to a greater extent employed best-cost provider strategy. It is clear that most of the

National English radio stations in the study relatively employed both strategies in order to survive in the media's volatile environment.

4.4.6 Company sales turnover

This is the overall sales made in a given particular year. This may be determined by a number of factors: population, economy of a given country, size of the firm, marketing and many more. This survey aimed at finding out sales made by these stations as a measure of their productivity. Below is a bar graph indicating sales reported by the respondents.

Figure 8: Annual sales turnover



Source: Research data

From the findings, 8 respondents reported that their stations made an annual turnover of between 5 to 10 million and 10 to 40 million, 16 of the respondents made 40 to 100 million while 12 of respondents made over 100 million in the same period. This indicates good returns for these stations.

4.5 Differentiation - Product differentiation

4.5.1 Ways of creating unique image of the firm

Respondents unanimously suggested the need to create unique image of the firm to the customers. They further suggested the ways to achieve uniqueness. These suggestions include: being a preferred station for certain age group, preferred Christian radio of choice, preferred music genre e.g. reggae radio station, blues and rhythms, soul stations and unique programs.

4.5.2 The extent of adopting product differentiation strategies

Table 11: Strategy adoption to remain competitive

Strategy adoption to remain competitive	**Greater extent**		**Moderate extent**		**Low extent**		**Not at all**	
	Freq.	**%**	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**
Quality differentiation	40	91	4	9				
Image differentiation	24	55	20	45				
Support differentiation	21	63	12	27	4	9		
Price differentiation	20	45	24	55				
Design differentiation	20	45	24	55				
Un-differentiation					4	9	40	91

Source: Research data

The table above indicates the extent of use of various category differentiation strategies. The stations under the study have adopted quality differentiation than any other category with 91% adopting it at greater extent and 9% moderate extent. This is then followed by image differentiation with 55% adopting it at a greater extent and 27% moderate extent. 63% adopted support differentiation to a greater extent. Price differentiation and design differentiation was adopted at 20% at greater extent. In contrast 91% would not adopt un-differentiation at all. It can be concluded that most of the stations adopted various forms of differentiation strategy in one way or the other. Emphasis on quality differentiation by majority respondents' shows stations commitment to offer /deliver high quality products to its listeners this may further be translated to customer loyalty as earlier indicated.

4.6 Focus/market segmentation strategy

4.6.1 Categories of customers relying on a station for their entire needs

Customers have different tastes and preferences and this has necessitated the radio stations to come up with different tastes, luring their customers. Respondents were asked whether there were categories of customers who relied entirely on the station for their needs. Findings presented in the table below indicate that 76.1 percent agreed with the statement while 23.8 percent said no to the statement .This can be interpreted to mean that majority of the stations have a target group of customers whom they are dedicated to. This can articulated to number of preferences by the customers versus the services offered by that particular radio station.

Table 12: Customers relying on a station for their entire needs

Response rate	Frequency	Percent
Yes	34	76.1
No	10	23.8
Total	44	100

Source: Research data

Further in this section respondents were asked of give ways in which they acquired this category of customers. A number of ways were highlighted which include programs aired, tastes of certain groups of people, airing religious materials only and through playing a certain genre of music only.

4.6.2 Awareness

This part of the study attempted to find out how stations created awareness for their products and services. Various methods were employed in creating awareness.

Table 13: Awareness creation

Type of awareness	Frequency	Percentage
Concerts	43	97.72
Co-Hosting and events co – sponsoring	42	95.46
Advertisements both in print media and outdoor	41	93.18
Road Shows/promotions	40	90.91
Corporate social responsibility	35	79.56
Intermittent jingles by intra station..	22	50.00
Church announcements	7	15.91

Source: research data

Table 13 indicates that the majority of radio stations attempted various types of awareness creation. 97.72 percent created awareness through concerts, 95.46 percent co-hosting and events co-sponsoring, 93.18 percent through advertisements both in print and outdoor, 90.91 percent through road shows/promotions, 79.56 percent through corporate social responsibility, 50 percent created awareness through intermittent jingles by intra stations and the least awareness creation is through church announcements constituting 15.91 percent.

4.6.3 The extent of adopting focus strategy to remain competitive

Respondents were given one strategy and assess the extent to which it was adopted by the stations. This was servicing a specific market. Respondents confirmed that this strategy was used at greater extent and moderate extent across all radio stations. The fact that radio stations have to a greater and moderate extent adopted focus strategy indicated high level of competitive strategy adoption by English radio stations.

4.7 Location

Location of the business is very important as is the degree of proximity to its customers, services providers and other necessary product and services. A company can gain a competitive advantage as a result of its ideal location. In this section, respondents were supposed to give advantages and disadvantages their station derives from its locations. Advantages raised were: proximity and accessibly to customers, location in busy central business district and image portrayed through the location. ample parking space for the customers. Disadvantage included limited room for expansion congestion and mixing up of frequencies among other radio stations.

4.8 Challenges/threats

4.8.1 Challenges encountered in running of a radio station

Organizations face various challenges and threats in their pursuit to remain competitive in the market. The respondents were asked to identify or figure out challenges encountered in running their operations.

Table 14: Challenges encountered in running a radio station

Challenges	Frequency	Percentage
1. Personnel poaching by other operators	44	100
2. Program imitations	44	100
3. Stiff competition (both international and local vernacular stations)	43	97.73
4. Limited frequency coverage within some parts of Kenya	43	97.73
5. Government restrictions and censorships	42	95.46
6. High operational costs e.g. electricity, taxes, labor costs etc	41	93.18
7. Divergence of needs and tastes by customers	40	90.91
8.Cost of broadcasting equipment	40	90.91
9. Political interference	38	86.36
10. High cost of voice-overs for commercials	37	84.09
11. Market segmentation	35	79.55
12. Risks of personnel on the field while gathering news	30	68.18

Source: research data

Table 14 outlines the challenges given out by the respondents, 100 percent identified personnel poaching by other operators and program imitation among the radio stations as a big challenge. 97.73 percent of respondents identified stiff competition by local vernacular radio stations and international radio stations like BBC, and limited frequency coverage in some parts of the country. Government restriction and censorship was identified by 95.46 percent of respondents.93.18 percent identified high cost of operation which included electricity, taxes and labor costs as a challenge.90.91 percent pointed out divergence and change in customer tastes and high costs of broadcasting equipment.86.36 percent quoted political interference while 84.09 percent identified high costs of voice-overs for commercials. On the other hand 79.55 percent identified challenges caused by market segmentation by languages especially vernacular and finally 68.18 percent figured out risks of personnel on the field while gathering news. It can be concluded that the radio stations face numerous challenges as they go about their business.

4.8.2 Challenge minimization

Respondents gave possible solutions to mitigate the above mentioned challenges. The minimization measures include quality improvements, research (from reputable research firms e.g. Steadman), building customer loyalty, acquisition of high quality broadcasting equipment and constant strategy reviews.

4.8.3 Threats by new unlimited entry into the industry

Media industry in Kenya has been growing at unprecedented pace in the recent years. This poses a threat to the existing radio stations. This part of the study sought to establish whether there exists new threat as a result of entry. Respondents were supposed to answer a yes or no to this effect. They were further asked on how they minimized these threats. The out come of the findings indicate that more than half of respondents said yes. Cited strategies to minimize these threats were persistent marketing, improved quality and objectivity of broadcasts, satisfaction and involvement of the audience.

4.8.4 Suggestions for making the radio industry competitive

Respondents were asked to share their suggestions of making radio industry more competitive. Innovation and creativity was the most cited way of making the industry more competitive. Other suggestions included government to open up frequencies to cover a wide population and more freedom of press.

4.8.5 Value of adopting competitive strategies to the firms

Respondents were expected to assess the value of competitive strategies to a firm. Below are the outcomes of their assessment where they were supposed to give 'yes' or 'no' opinion. 95.4% of the respondents confirmed that there is value to any firm adopting competitive strategy

Table 15: Value derived by a firm adopting competitive strategies

Response rate	Frequency	Percent
Yes	42	95.45
Missing	2	4.55
No	0	0

Source: Research data

CHAPTER FIVE: SUMMARY, CONCLUSIONS AND RECOMMENDATIONS

5.1 Introduction

This chapter provides a summary of the findings, conclusions and recommendations into the competitive strategies adopted by National English radio stations in Kenya.

5.2 Summary

The objectives of the study were

i. To determine the adoption of competitive strategies by National English radio stations.

ii. To identify challenges posed by the competition to the National English radio stations operating in Kenya.

Data was collected using a semi-structured questionnaire and various measures including mean and standard deviation were used.

The findings indicate that of the National English radio stations involved in the study, 82% were wholly owned by local investors. In addition there has been a notable trend in the number of operations whereby it appears to be stratified with those firms having operational experience between 3 to 4 years, 5 to 10 years and over 10 years taking an equal percentage of 27.2% operation years in Kenya.

The respondents indicated various measures employed in an attempt to adopt competitive strategies with regard to the number of directors, employees, offering a variety of programs and programs choice. The firms under study indicated involvement in initial steps of strategy adoption that is strategy formulation which attracted a 100% response rate confirmation. Parties involved in this phase are mainly the directors and consultants and a summary guide of the firm objective is stated in company mission and vision statements. The formulated mission and vision is reviewed after every 5 years.

The findings of the study show that there are various strategies adopted by National English radio stations in Kenya. They include cost leadership, focus and product differentiation. All stations under the study adopted cost leadership strategy and this was evident in their measures to minimize the cost of their production and produce more, a good example being ways of improving their sales. The main way adopted by all firms was building customer loyalty, selling to large customers, installing new equipment, offering price discounts and employing many staff in that order. This shows the extent to be a low cost producer and high production. Decisions on prices were left in the hands of management and market forces. Product differentiation strategy was also adopted by a majority of the firms; main differentiation was focused on quality, price, image, support and design in that order. Focus strategy was also in play in a majority of firms with many firms focusing on certain categories of customers which is achieved through a number of ways including choice of programs, music genres and religion among others.

A number of challenges facing the National English radio stations were raised, including stiff competition from both vernacular and other English radio stations and high competition for personnel and poaching by other operators which may take the form of counter offers by the rivals. Political interference was also sighted and this may take the form of conflict of interest by politicians and greed. Similarity of programs aired was also given as a challenge largely due to imitation and lack of properly enforced copyright acts. Government restrictions and censorships are also challenges since the government dictates what should be aired or not. Divergence of needs and tastes by customers has also affected the radio industry with many customer tastes and changes of these tastes over time. High taxation, high cost of broadcasting equipment, limited frequency coverage within some parts of Kenya and high cost of voice-overs were also sighted as challenges. Suggestions on minimizing the challenges, for instance, quality improvement and high innovation among others were given by the respondents.

5.3 Conclusion

Increased competition threatened the attractiveness of the radio industry and thus reducing the profitability of the industry players. This has exerted pressure on radio stations to become proactive and to formulate and adopt successful competitive strategies that facilitate proactive responses. It can be concluded that National English Radio stations have on a large scale adopted competitive strategies in coping with stiff competition in the industry.

Strategies that have been the most suitably adopted by majority of the firms as manifested by study findings are differentiation and focus. In his definition, Porter (1980) noted that differentiation involves creating a product that is perceived as unique. The unique features or benefits should provide superior value for the customer for the strategy to be successful. In focus strategy a firm concentrates on a select few target markets (Porter 1980). Differentiation strategy has concentrated on products, image, quality and price. Majority of National English radio stations have a target market which has cut across religion, music tastes and age among other categories. Radio stations have faced enormous challenges brought by a number of factors. Besides strategy deployment, some challenges cannot be solved exhaustively. However, the management team has a lot of responsibility in solving challenges that are unique to their firm as well as solving the market challenges.

5.4 Limitations of the study

Every study inevitably encounters certain levels of limitations due to a variety of factors. Resource availability and limited time constrained the researcher from traveling to locations outside the city. Respondents who were senior managers are usually very busy hence the tendency not to give in-depth attention to the unstructured parts of the questionnaire.

5.5 Recommendations for further research

The researcher recommends that further studies can be done on the competitive strategies adopted by all radio stations operating in Kenya which include the vernacular, Swahili. International and community radio stations. These studies should find out the challenges faced and how they are handled. This can then be used in the preparation of a policy paper by the media representative body, the Media Owners Association. Future surveys can also tackle the area of strategy formulation by the National English radio stations.

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APPENDIX 1: Letter of introduction to respondents

September 2007

Dear Respondent,

MBA – Research Project

I am a student of the University of Nairobi currently undertaking an MBA degree and majoring in Strategic Management. I am collecting information that will be used to analyze the level and effects of competition in the Radio industry in Kenya. Please find attached a questionnaire for you to fill.

This information will be used to write a strategic management project which is a requirement for the fulfillment of the Master of Business Administration Degree. The information you will give will be treated in total confidence. Your cooperation in this exercise will be highly appreciated.

Thank you.

Yours Sincerely

Maxison Mutuah
MBA student.

APPENDIX 2: Questionnaire

Competitive strategies adopted by National English radio stations in Kenya.

Please answer the following questions by giving the necessary details in the spaces provided.

Name of the firm (optional)..

Section A: General information

1. Position held in the organization (optional)......................................
2. Number of years since joining this station

   0-2 years { }

   3-5 years { }

   5-10 years { }

   Over 10 years { }

   Others (specify) { }
3. Number of employees in the whole organization..........................
4. Company ownership

   Local { }

   Foreign { }

   Others (specify) { }
5. Number of directors

   0 to 2 directors { }

   Between 3 to 4 { }

   Between 5 to 10 { }

   Over 10 Directors { }

   Others (specify) { }

6. What types of programs do you offer (Tick as many as applicable)

Music	{ }	Humor	{ }
News	{ }	Greetings	{ }
Phone-ins	{ }	Sports	{ }
Advertising	{ }	Gospel	{ }
Commercial recordings	{ }		

Others (specify)……………………………………………………………………...

7. Station's period of existence

0 -2 years	{ }
3-4 years	{ }
5-10 years	{ }
Over 10 years	{ }

8. Is your organization engaged in any other business? Yes { } No { }

9. If yes, which are these other businesses?...

10. How do you choose your programs (Tick where applicable)

Our station looks at other stations' programs	{ }
Our station looks at other stations' programs and copies the style	{ }
We focus on the needs of the audience	{ }

Others (specify)……………………………………………………………………

11. In your opinion what are the basic/minimum required to operate Radio station?..

12. In your opinion do other radio stations in operation offer the same services as you do? Yes { } No { }

Section B: Strategy formulation

13. (i) Does your organization has a formal documented mission and vision statement?

Yes ( )

No ( )

(ii) If Yes in 7(i) above, please indicate those that were involved in the formulation of the company's mission and vision.

Consultants ( )

Shareholders ( )

Directors ( )

Others (Please specify) ....

14. How often are the mission and vision statements reviewed?

After every 5 Years ( )

Annually ( )

Semi-annually ( )

Any other period (Please specify) ....

Section C: Cost leadership strategies

15. What are your major cost elements?

....

16. How does your firm minimize the costs in (17) above so as to improve on profitability?

....

17. How would you rate the following as ways of improving your sales? (With 1= not important, 2 = less important, 3 = important, 4 = moderately important and 5 = very important)

	1	2	3	4	5
Employing many staff					
Installing new equipment					
Offering Prize discounts					
Selling to large customers					
Building customer loyalty					

Others (specify)...

18. Do you customers normally ask for price discounts? Yes { } No { }

19. How sensitive are your customers to changes in cost of advertising?

Very sensitive { } Sensitive { } Indifferent { }

20. Who normally decides on the prices to be charged?

Management	{ }	Board of Directors	{ }
Market driven	{ }	Media Owners Association	{ }

Others (specify)..

21. To what extent does your organisation employ the followings strategies?

	Greater extent.	*Moderate extent.*	*low extent.*	*Not at all*
Low - cost provider strategy	{ }	{ }	{ }	{ }
Best – cost provider strategy	{ }	{ }	{ }	{ }

Any other (Please specify)..

22. What was the company's turnover on sales in the last audited accounts?

5-10 million	{ }
10-40 million	{ }
40-100 million	{ }
Over 100 million	{ }

Section D: Product differentiation

23. Do you try to create a unique image of your firm to customers?

....

24. If yes, what are the ways in which you do this?

....

25. To what extent do you adopt the following strategies to remain competitive in the market?

	Greater extent.	*Moderate extent.*	*low extent.*	*Not at all*
Price differentiation	( )	( )	( )	( )
Image differentiation	( )	( )	( )	( )
Support differentiation	( )	( )	( )	( )
Quality differentiation	( )	( )	( )	( )
Design differentiation	( )	( )	( )	( )
Undifferentiation	( )	( )	( )	( )

Any other - Please specify

....

Section E: Focus strategy

26. Are there categories of customers who rely on your station entirely for all their needs?

Yes { } No { }

27. What are the ways you acquire a category of customers?

....

28. How do you inform people about your presence and services?

....

29. To what extent do you adopt the following strategy to remain competitive in the market?

	Greater extent,	*Moderate extent,*	*low extent,*	*Not at all*
Servicing a specific Market	( )	( )	( )	( )

Section F: Location

30. What are the advantages/disadvantages your firm derives for being located in this particular place?

<u>Advantages</u>	<u>Disadvantages</u>
1	1.
2	2.

3 3.

4 4.

Section G: Challenges/threats

31. What are some of the problems you encounter in running your firm?

....

32. How could the problems be minimized?

33. Are there any threats from unlimited entry into the industry by new radio stations?

Yes { } No { }

34. If yes, how can these threats be minimized?

....

35. Suggest ways of making the radio industry very competitive?

....

36. In your own opinion, is the adoption of competitive strategies of any value to the firm? Yes { } No { }

Thanks for your responses

APPENDIX 3: List of respondents in the industry

RADIO STATION	CONTACT DETAILS
KBC ENGLISH SERVICE	P.O. BOX 30456, 00100, NAIROBI TELEPHONE: 318823 Email: marketing@kbc.co.ke WEBSITE: www.kbc.co.ke Broadcasting House, Harry Thuku Road
METRO FM (101.9)	P.O. BOX 30456, 00100, NAIROBI TELEPHONE: 318823 Email: news@metrofm.co.ke WEBSITE: www.metrofm.co.ke Broadcasting House, Harry Thuku Road
CAPITAL FM (98.4)	P.O. BOX 74933, 00200 NAIROBI TELEPHONE: 020 2210020 Email: info@capitalfm.co.ke WEBSITE: www.capitalfm.co.ke 19th Floor, Lonrho House.
KISS 100 FM	P.O. BOX 74497, NAIROBI TELEPHONE: 020 4244000 Email:info@kissfm.co.ke WEBSITE: www.kissfm.co.ke 2nd Floor, Lions Place, Westlands.
CLASSIC FM (105.2)	P.O. BOX 74497, NAIROBI TELEPHONE: 020 4447404 Email: info@classicfm.co.ke

	WEBSITE: www.classicfm.co.ke 2nd Floor, Lions Place, Westlands.
EASY FM (96.4)	P.O BOX 49010 00100 NAIROBI TELEPHONE: 020 3288 000 Email: info@nation.co.ke WEBSITE: www.nationfm.co.ke Kimathi Street, 6th Floor, Nation Centre
HOPE FM (93.3)	P.O. BOX 42254, 00100 NAIROBI TELEPHONE: 020 2722418 Email: info@hopefm.org WEBSITE: www.hopefm.org Valley Road, Nairobi
HOT 96	P.O. BOX 2345667, NAIROBI TELEPHONE: 020 2714100 Email: HOT96marketing@royalmedia.co.ke WEBSITE: www.royalmedia.co.ke
FAMILY FM	P.O. BOX 2330, KNH, NAIROBI TELEPHONE: 020 4200000/4347283 WEBSITE: www.familykenya.com Email: info@familykenya.com Dik Dik Gardens, Off Gatundu Road, Kileleshwa
RADIO WAUMINI (88.3)	P.O. BOX 20774, 00202 NAIROBI TELEPHONE: 020 8561457 WEBSITE: www.radiowaumini.org Email:marketing@radiowaumini.org Thika Road.

HOMEBOYZ RADIO (91.5) P.O. BOX 20774, 00202 NAIROBI

TELEPHONE: 020 553943/52

WEBSITE: www.homeboyzradio.co.ke

Ambar House, 2nd Floor, Baricho Road.