STRATEGIC POSITIONING OF PROMOTIONAL MARKETING FIRMS IN KENYA

BY:

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DECLARATION

This project report is my original work and has not been submitted for a degree in any other institution of learning.

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Dedicated to my mother Rebecca Theuri and husband Kamande Muiruri for their constant encouragement, prayers and support for which I shall always be grateful.

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ABSTRACT

An organization's strategic position is its perceptual location relative to others. Strategic positioning provides a vehicle for creating organizational focus and a framework for considering these resource allocation questions. When an organization can clearly articulate its perceptual location relative to those of other organizations, the complexities surrounding these decisions are significantly reduced (Gershon 2003). Compared with manufacturing firms, services face unique problems in positioning and promoting their offerings. The design of the service environment is an important aspect of the positioning strategy and conveys the image of the organization (Schiffman & Kanuk 2000).

The type of industry an organization is in will influence the way it competes and the strategies it will adopt. According to Porter (1996), strategic positions emerge from three distinct sources, which are not mutually exclusive and often overlap. These strategies have been used to study the promotional marketing industry in Nairobi, Kenya. At the time of this study there were twenty one registered promotional marketing organizations (Marketing society of Kenya 2003) sixteen responded. Data was obtained from senior managers of these companies using a semi-structured questionnaire administered through personal interviews. Data was summarized using frequency tables, percentages and descriptive mean scores.

The findings indicated that the promotional marketing industry is very young and most companies in this sector are less than four years old. All but one of them were locally owned and run. Differentiation was the most popular strategic position taken by most organizations.

The mainstay of this industry lay in giving services mainly in product launches consumer promotions and competition. Anticipated market growth and industry profitability played a key role in motivating entry in the sector, which faced constant business seasonality. Experience of top management, quality of service and period of operation in the industry were the key success factors in the industry. Lack of a strong and large client/portfolio size and low loyalty were the main weakness highlighted in organizations' self-assessments while innovation, innovation/creativity and quality of service were the main strengths. A large proportion of organizations audited their environment mainly by informal means and formally through Kenya Revenue Authority, Marketing Society of Kenya and Registrar of society.

Organizations in this sector are positioned although not all seem to have a cohesive strategy. They all needed to clearly define their strategic focus create niches for themselves and be proactive in increasing their client and portfolio size. They needed to create a professional body to set standards and control entry into their business.

CHAPTER ONE: INTRODUCTION

1.1 Background

During the last decade businesses around the world have experienced fundamental changes which have led to a major shift in company competitiveness. Industry transformation has changed the boundaries of competition. New markets and industries have emerged as a result of substantial changes in technology. Deregulation has removed protective barriers from certain industries and firms have suddenly felt the pressure to improve their products and services to meet world standards. To survive in this turbulent environment, businesses have to rethink their approach towards management and search for new concepts and methods that give guidance to this environment. (Bonn, Ingrid & Christodoulau 1996).

In Kenya over the past decade tremendous changes have taken place, political reforms in the 1990s, on going economic reform programs aimed at economic recovery and growth. Structural changes such as expansion of the informal sector, regional economic integration brought about by liberalization of trade. Progress in technology specifically with internet access and mobile telephones coupled with licensing of frequencies for radio and television broadcasters has thrown most local businesses into totally different environments within a very short span of time. Schmitt (1999) said that, we are in the middle of a revolution. A revolution that will render the principles and models of traditional marketing obsolete. A revolution that will change the face of marketing forever. A revolution that will replace traditional featured-and-benefit marketing, with promotional marketing.

Schmitt (1999) goes on to further say that, as the new millennium approaches, three phenomena are signaling an entirely new approach to marketing, if not to doing business as a whole. These three simultaneous developments are:

- the omnipresence of information technology
- the supremacy of the brand, and
- the ubiquity of communication and entertainment.

This phenomenon provides the outlines of a future type of marketing and management driven by experiences derived from promotional marketing.

1.2 Advertising

The field of advertising and promotion continues to dramatically change since the dominant days of high-powered Madison Avenue Agencies. Marketers must look beyond tradition in order to achieve success. In order to best communicate with consumers, advertisers must utilize the myriad of media outlets-print, radio, cable, satellite TV, and now the Internet (Belch & Belch 2001).

Marketing organizations in Kenya have been exposed to numerous challenges including liberalization, increased emphasis on globalization, regionalization, technological changes, a worsening economy and changing customer needs and preferences. According to Ansoff (1990) for organizations to justify their existence and be able to survive in this turbulent environment, they have to embrace these changes by anticipating them sufficiently in advance and plan timely responses, increasing speed of implementing of response, being flexible and responding on time to surprises which could not be anticipated in advance.

Promotional marketing enables us to offer stimulating brand experiences at emotionally charged 'touch points' that connect with consumers and deepen their commitment to our brands (Diageo 62002 – an internal DIAGEO group of companies manual). According to Diageo PLC promotional marketing manual, promotional marketing helps create powerful and memorable total brand experiences based on key brand benefits. This is a particularly effective and efficient means of building meaningful connections with target consumers because of accurate targeting of consumers, through immersion, interaction and persuasion. Generating emotional bonding, connecting with the person as a whole – body, mind and heart. Successfully leveraging the 'social bonding' inherent in human relationships.

Advertising expenditure in both print and electronic in Kenya has continued to grow with 3 billion spent in 1999 and 4.1 billion in 2000 (Steadman 2000). Over the same period the Communication Commission of Kenya has licensed and assigned frequencies to 5 companies to operate TV stations, and 19 FM sound broadcasters. (The Communications Commission of Kenya Strategy Paper 2002). This means that the advertisers spend is increasingly being thinly spread over the different medium trying to target specific consumers. The situation is bound to worsen with the Communication Commission of Kenya, planning the country's broadcasting spectrum to avail additional frequencies in an attempt to meet growing demand.

Belch & Belch (2001) points out that, marketers must look beyond traditional media in order to achieve success. In order to communicate with consumers, advertisers must utilize the myriad of media outlets – print, radio, cable, satellite TV, and now the Internet. Belch/Belch then reflects the shift from the conventional methods of advertising to the more widely recognized approach of implementing an integrated marketing communications strategy, which must recognize uses of all promotional tools available to convey a unified message to the consumer.

1.3 Promotional Marketing Industry

Promotional marketing in Kenya will hence be the answer for many marketers seeking precision in targeting their consumers in an efficient and effective manner. Promotional companies are poised to play a major role in building brand equities and increasing sales volume especially if they focus on experiential aspects of promotion. Most of the organizations in this sector refer to themselves as promotional companies, but may not fully grasp in totality the immense significance and breadth of their service and latent potential. To achieve this, management has to employ management processes that will position the firm optimally in its competitive environment by maximizing the anticipation of environmental changes and unexpected internal and competitive demands. This all encompassing approach is strategic management (Pearce 1997). Strategic management whose key concept is strategy 'takes a birds view of the entire organization - the environment which it is operating, the direction the management intends to take, the plan for getting there, implementing and execution of the chosen strategy (Grant 1998).

There is no prior study done on the strategic positioning of promotional companies in Kenya to-date. This is despite their crucial role in driving brand trial, hence growth in brand sales and health resulting in corporate equity success.

1.4 Research Problem

Beckwith (1997) says that, the fear of positioning arises because when standing for one thing means you cannot expressly stand for other things. Positioning requires that you must sacrifice and sacrificing opportunities requires a narrow focus, often creating opportunities. Promotional marketing companies have a broad spectrum of services they offer, some being merchandising, trade promotions, consumer promotions, product launches, sports management and other experiential marketing activities (Diageo 2002 – an internal DIAGEO group of companies manual).

Most of these organizations have not been seen to be proactive and probably do not realize the general global marketing trend and latent potential towards promotional marketing in Kenya. They therefore seem to be everything to everyone to ensure that they harness all opportunities. The broadness in this definition therefore confines their spectrum of creativity and growth.

According to Marketing Society of Kenya there are about 21 marketing Promotional marketing companies (Marketing Society of Kenya 2003). Kenyan advertisers on the other hand are faced with the challenge of choosing the right media, ensuring that their messages reach their targeted consumers efficiently and effectively. This is difficult given the diverse electronic channels; 19 FM stations and 5 TV stations (The Communications Commission of Kenya Strategy Paper 2002). Out of a population of 30 million Kenyans there are 5.1 million radios and 2.59 television sets. Meanwhile average numbers of newspapers bought daily are 270,000 and each read by 6 people. (Kenya All Media and Products Research Paper 2000).

Radio, Television and dailies are the main advertising channels in Kenya, yet a very small section of Kenyans have them available. There is therefore a growing demand for experiential promotional marketing services and these firms need to reach the effectively and efficiently reach the consumer. Promotional organizations can poise themselves to offer solutions to advertisers or brands trying to ensure successful reach of their messages through use promotional marketing tools with or without integrating this with media. Management desire information on program effectiveness and impact on customer satisfaction to be able to determine success. Intense competition in Kenya has led to clattered media activities not unique to specific brands, yet with promotional marketing tools, promotional firms can create unique and specific to consumer brand experiences with high memorability hence increase brand equity. Despite the current and potential significance of promotion marketing in economic development, no study has been carried out on aspects of strategy positioning.

1.5 Objectives of the study

Investigated aspects of strategic positioning by the experiential marketing firms in Kenya. Collected information from local promotional organizations operating in Nairobi:

(i) Established the strategic positions taken by promotional marketing firms in the changing environment.

(ii) Established factors influencing positioning decisions in these firms.

1.6 Importance Of The Study

This study was of significance to both the promotional marketing companies and their clients. The study documented the strategic positioning in the promotional marketing industry and was used as a reference in the development of a strategic growth. The strategic framework aided managers in development and implementation of strategic positioning. It will provide the owners of promotional marketing firms with information on the general state of the industry; competition and the positioning strategies, which were used to compete in the industry. It provided potential investors in this industry with information on how to best approach positioning and some of the critical challenges they faced, hence prepared adequately. They therefore were more informed while looking at the industry's attractiveness as well as had an idea of the competitive strategies they would need to build up in order to be successful. This study highlighted and further confirmed to the Kenyan fraternity of marketing management of the increasing crucial role promotional marketing organizations played to grow their business equity in Kenya. To scholars, the study was meant to increase to the body of knowledge in this area and stimulate further research in the industry.

CHAPTER TWO: LITERATURE REVIEW

2.1 Strategic Positioning

An organization's strategic position is its perceptual location relative to others. Strategic positioning provides a vehicle for creating organizational focus and a framework for considering these resource allocation questions. When an organization can clearly articulate its perceptual location relative to those of other organizations, the complexities surrounding these decisions are significantly reduced (Gershon 2003).

The most important essentials of positioning are:

i. You must position yourself in your prospect's mind
ii. Your position should be singular: one simple message
iii. Your position must set you apart from your competitors
iv. You must sacrifice. You cannot be all things to all people; you must focus on one thing. (Ries & Trout 1993).

Strategic positioning involves deciding, how the organization should be perceived by prospective clients in relation to their needs and the competitors.

The key to positioning is to find a unique – niche (unfulfilled need or gap) that is not occupied (satisfied) by competitors (Schiffman & Kanuk 2000).

In our over-communicated society, very little communication actually takes place. Rather, a company must create a 'position' in the prospect's mind. A position that takes into consideration not only a company's own strengths and weaknesses, but those of its competitors as well (Ries/Trout 1993).

Gershon (2003) further defines several parameters used by healthcare organizations, for strategic positioning. These are service, quality, access, scope, innovation and demographics.

i. Service is a popular positioning approach with a focus on the physical environment where services are provided and systems employed for customer transactions. The goal of this approach should be to establish the organization's reputation for being customer friendly.

ii. *Quality.* Many organizations are adopting quality as a positioning mantra. Consumers have difficulty discerning the quality of a particular organization through means other than anecdotal evidence.

iii. *Access.* A position that emphasizes accessibility focuses on attributes such as location and hours of operation. Facilities are situated on how easy it is to get as a key positioning strategy. This has been a successful model with Starbucks.

iv. *Scope.* How wide or how narrow a range of services an organization offers provides another positioning opportunity. Most organizations focus on a specialty and at the same time, offering a broad range of services (the one-stop shop). This is another approach that has been successful in differentiating some organizations.

v. *Innovation*. Organizations that are on the leading edge of clinical research and technology can establish a position based on these innovative factors. Often being first in the market creates a strategic position that is difficult for competitors to equal or surpass.

vi. *Demographics*. Focusing on a particular demographic segment of the market is another approach to establishing a clear market position. Most frequently health care chooses to focus on children, women, and elderly. Serving a targeted population allows the organization to deliver highly customized services.

Gershon (2003) concludes that although the list given above is not all-inclusive it captures those positioning strategies that are most often adopted by healthcare organizations. The challenge for most organizations is determining which positioning strategy is most appropriate. This means that these organizations must recognize that they cannot afford to be all things to all people. Successful organizations make difficult decisions regarding the focus of their efforts. A classic SWOT (strengths, weaknesses, opportunities and threats) analysis – primary market research that identifies an organization's current market position – as well as a rigorous competitor assessment provides the necessary background information.

Compared with manufacturing firms, services face unique problems in positioning and promoting their offerings. Because services are intangible, image becomes a key factor in differentiating a service from its competition. The design of the service environment is an important aspect of the positioning strategy and conveys the image of the organization (Schiffman & Kanuk 2000).

2.2 The Origins of Strategic Positions

Strategic positioning is what you do to the mind of the prospect, changes made on a product, a company, institution or even a person for the purpose of securing a worthwhile position in the prospect's mind (Ries & Trout 1993).

According to Porter (1996) strategic positions emerge from three distinct sources, which are not mutually exclusive and often overlap.

(i) First positioning can be based on producing a subset of an industry's products or services. This is variety based positioning, because it is based on the choice of product or service varieties rather than customer segments. Variety based positioning makes economic sense when a company can best produce particular products or services using distinctive sets of activities.

(ii) A second basis for positioning is that of serving most or all the needs of a particular group of customer. This is a need based positioning, which comes closer to traditional thinking about targeting a segment of customers. It arises when there are groups of customers with differing needs, and when a tailored set of activities can serve those needs best. Some groups of customers are more price sensitive than others, demanding different product features, and needing varying amounts of information and support.

(iii) The third basis for positioning is that of segmenting customers who are accessible in different ways. Although their needs are similar to those of other customers, the best configuration of activities to reach them is different. This is called access-based positioning, and can be a function of customer geography or customer scale – or anything that requires a different set of activities to reach customers in the best way.

Access can be a function of customer geography or customer scale – or anything that requires a different set of activities to reach customers in the best way. Segmenting by access is less common and less well understood than the other two bases.

Porter (1996) further says that, positioning is not only about carving out a niche. A position emerging from any of the sources can be broad or narrow. A focused competitor, such as Ikea, targets the special needs of a subset of customers and designs its activities accordingly. Focused competitors thrive in on a group of customers who are over-served (and hence overpriced) by more broadly targeted competitors, or under-served (and hence under-priced). The ability to view the future in ways that differ significantly from the past, to realistically assess the resources required to achieve a new vision, and to facilitate the transition from the present are the necessary ingredients in developing and implementing a successful positioning strategy. In this Harvard strategy article Porter (1996) refers to the connection of positioning with generic strategies. He refers to his text Competitive Strategy (1985) when he introduced – cost leadership, differentiation, and focus. He says that these generic strategies remain useful to characterize strategic positions at the simplest and broadest level, variety based positioning aligns to cost leadership. Need based positioning aligns to focusing and access based positioning to differentiation. The bases for positioning – varieties, needs, and access – carry the understanding to a greater level of specificity.

2.3 A sustainable Strategic Position Requires Trade-offs.

Choosing a unique position, however, is not enough to guarantee a sustainable advantage. A valuable position will attract imitation by incumbents, who are likely to copy it in two ways. A competitor can reposition them-selves to match a superior performer and more commonly the type of imitation called straddling. The straddler seeks to match the benefits of a successful position while maintaining its existing position. It grafts new features, services or technologies onto the activities it already performs. (Porter 1996).

Porter (1996) emphasizes that a strategic position is not sustainable unless there are trade-offs with other positions. Trade-offs occur when activities are incompatible. Simply put, a trade-off means that more of one thing necessitates less of another. Trade-offs create the need for choice and protect against re-positionsers and straddlers. Trade-offs arise for three reasons:

(i) Inconsistencies with image and reputation. A company known for delivering one kind of value may lack credibility and confuse customers – or even undermine its reputation – if it delivers another kind of value or attempts to deliver two inconsistent things at the same time.

(ii) Activities themselves. Different positions (with their tailored activities) require different product configurations, different equipment, different employee behavior, different skills, and different management systems. Many trade-offs reflect inflexibilities in machinery, people, or systems.

(iii) Trade offs arise from limits on internal coordination and control. By clearly choosing to compete in one way and not another, senior management makes organizational priorities clear. Companies that try to be all things to all customers, in contrast, risk confusion in the trenches as employees' attempt to make day to day operating decisions without a clear framework.

Positioning trade-offs are pervasive in competition and essential to strategy. They create the need for choice and purposefully limit what a company offers. They deter straddling or repositioning, because competitors that engage in those approaches undermine their strategies and degrade the value of their existing activities. Strategy is making trade-offs in competing. The essence of strategy is choosing what not to do. Without trade offs, there would be no need for choice and thus no need for strategy. (Porter 1996).

Strategic positions should have a horizon of a decade or more, not of a single planning cycle. Continuity fosters improvements in individual activities and the fit across activities, allowing an organization to build unique capabilities and skills tailored to its strategy. Continuity also reinforces a company identity (Porter 1996).

2.4 Benefits & Impact of Positioning

According to Ries and Trout (1993) we have become an over communicated society. The per capita consumption of advertising in America today is $376.62 a year compared to $16.87 in the rest of the world. In the communication jungle out there, the only hope to score big is to be selective, to concentrate on narrow targets, to practice 'positioning.

Positioning therefore will ensure that millions of dollars are not wasted to communicate many different things to the consumer. Beckwith (1997) says that positioning will make your word of mouth more effective. The best approach to take in our over communicated society is the oversimplified message. Positioning ensures that a company or product communicates a simple message either through advertising or their activities. It forces you to sharpen your message to cut into the mind. You have to jettison the ambiguities, simplify the message, and then simplify it some more if you want to come to a long-lasting impression (Beckwith 1997).

Beckwith (1997) further emphasizes that a clear position and focus gives everyone marching orders. The people behind your direct marketing, telemarketing, and advertising will know what to emphasize. People exposed to your message will see a common face and hear a common tune. They will learn exactly who you are.

When a company, product or service is clearly and well positioned, your employees will make your 'word of elevator' more effective. Since employees are effective marketers just riding up the elevator – particularly if they have something powerful to say about your company. The reverse is unfortunately, also true. Employees can rally your troops – a message that conveys what makes your company special also can make employees feel special by being part of your company. For instance if positioned as a cost leader then all employees realize the importance of cost control and rally towards this. This includes differentiation or driving uniqueness in an industry (Beckwith 1997).

Porter (1985) emphasizes the strategic importance of choosing, maintaining and sustaining the chosen positioning. He points out that it is crucial that the vision and positioning are synchronal.

2.5 Promotional Marketing Organizations in Kenya

In Kenya due to political and fiscal excesses which resulted in an economic stagnation in 1992 and 1993, under structural adjustment program (SAP) supported by World Bank and International Monetary Fund (IMF) in 1993 – 1995 (KENYA: Economic Policy and Trade Practices, 1995), the government embarked on economic reforms. These efforts were geared towards moving from a state-controlled economy to a free market economy, opening up the domestic market to international competition and economic recovery and growth in the years 1994 -9. From 100% in July 1993, month to month inflation rate fell down to 3.3% in October 1995 (KENYA: Economic Policy and Trade Practices, 1995). In spite of this, since 1997 economic growth rate has continued to fall from 2.3% to 1.4% in 1999 (Kenya letter of Intent and Memorandum of Economic and Financial Policies of the Government of Kenya, 2000 -03 Policy Framework, 2000). To date the country continues to experience high inflation, widespread poverty, low per capita income, and low private investment among other problems. Due to severe economic conditions and rapid technological advances, consumer behavior has also changed. Customers today are more informed, with ever changing needs and preferences. Organizations therefore need to define their products and services from the consumers' point of view. This places both challenges and opportunities to the promotional organizations.

According to David (1991), to survive and succeed the companies need therefore to adapt strategic management and by so doing " will be in a position to initiate and influence (rather than respond) activities thus gaining control over their own destiny.

Experiential marketing (which arises through promotional activities) provides unique opportunities to move beyond the delivery of products and services into the creation of 'consumer experiences'. Therefore brands can respond to people's individual motivations and impact their sensations i.e. how they sense, feel, think and act towards our brands. 'The ultimate goal of experiential marketing is to create 'holistic experiences' (Schmitt 1999). He further states that, 'Feel' marketing is the use of effective experiences effectively as part of marketing strategy; we need to get a better understanding of these moods and emotions. He states that 'As customers, we are bombarded with numerous sensory expressions. So, which ones do we pay attention to and keep in our minds as permanent experiences?

Following repossession of idle frequencies (May 2003), Communication Commission of Kenya has licensed and assigned frequencies to 5 companies to operate TV stations, and 19 FM sound broadcasters (Communication Commission of Kenya 2003). The Commission is however, re-planning the country's broadcasting spectrum to avail additional frequencies in an attempt to meet growing demand.

According to a research done by Steadman & Associates (2000), television viewers in Kenya, see as many as approximately 25,000 commercials each year. By the time they are about 30 years old, they will have viewed more than approximately 625,000 messages on TV alone. If one was to include all media and non-media delivered messages one commercial is just but a speck. What is important is for a brand to stand out in this cluster of images and messages.

Over 4.1 billion Kenya shillings was spent in advertising in 2002 (Steadman 2003) yet, fragmentation of radio frequencies has meant that targeting is more difficult and hence ability to measure effectiveness of the same. Gone are the days when we had only one national radio and television broadcasting station, hence any spot bought had an effective reach.

Promotion marketing in Kenya with emphasis on experiential activities will hence be the answer for many marketers seeking precision in targeting their consumers in an efficient and effective manner. Promotional companies are poised to play a major role in building brand equities and increasing sales volume. They can take advantage of the clatter on TV and radio prime times as a cost-effective sustainable and measurable alternative. Most of the organizations in this sector refer to themselves as below the line companies and may not fully grasp in totality the immense significance and breadth of their service and potential.

According to Marketing Society of Kenya there are about 21 marketing Promotional marketing companies (Marketing Society of Kenya 2003). The current problem in most of these organizations is that they do not see their role as experiential marketing services but as providers of below the line (BTL) services to brands. The narrowness in this definition therefore confines their spectrum of creativity and growth. BTL activities are a component of experiential marketing. (Diageo 2002– an internal DIAGEO group of companies manual)). Most of these organizations have not been seen to be proactive and probably do not realize the general marketing trend and latent potential towards experiential marketing in Kenya as is a growing trend globally.

Under the circumstances the challenge to top management is to identify that they are poised as future drivers in the marketing field. They need rekindling of interest and adapt strategic positions that will give them leverage. By so doing, "companies will be in a position to initiate and influence (rather than respond) activities thus gaining control over their own destiny" (David 1991).

CHAPTER THREE: RESEARCH METHODOLOGY

3.1 Scope of the study

This study focused on the aspects of strategic positioning of promotional marketing companies in Kenya. The researcher carried out a cross sectional analysis of the strategy positioning decisions of promotional marketing companies in Kenya.

3.2 The Population of Study

This study consisted of 21 promotional marketing organizations companies (Marketing Society of Kenya 2003). These are companies that offered experiential promotional marketing services to brands and companies aimed at enhancing positive brand or corporate imagery, increased brand volumes sales and profits. The researcher contacted all the twenty-one companies identified conducting a census. Only sixteen responded. [See appendix 2]

3.3 Data Collection Method

The data collected for the study comprised of both qualitative and quantitative data. Primary data was collected using a questionnaire format with both structured and unstructured questions [See appendix 1]. Unstructured questions expressed general attitudes and opinions that helped the researcher interpret responses to structured questions (Malhotra 1996).

In construction of the questionnaire, the researcher drew upon the works of Capon (1980) who studied planned practices of major manufacturing corporations headquartered in the eastern half of USA. The questionnaire was self administered through personal interviews with the managers of the promotional marketing companies. According to Parasulaman (1986) personal interviews are advocated as having the potential to yield the highest quality and quantity of data compared to other methods, because supplementary information may be collected in the course of the interview. This concurs with Cooper and Emroy (1985), who stated that the greatest value of personal interviews lies in the depth and detail of information that can be sourced.

3.4 Data Analysis

The questionnaire was edited for completeness and consistency before processing. Data was coded to enable responses to be grouped into categories. Data was analyzed using Statistical Package for Social Sciences (SPSS). Data was analyzed on likert scale due to some of its qualitative aspects. Frequency tables were used to compare the different parameters of the study. This was coupled with percentages and the use of descriptive means scores. Correlation analysis was used to mainly evaluate positioning parameters of cost leadership, differentiation and focus in relation to the period of operation in the industry.

CHAPTER FOUR: DATA ANALYSIS AND DISCUSSION FINDINGS

4. Introduction

This chapter deals with data analysis, findings and discussions on research findings. The data was summarised in the form of percentages, tables and mean scores where appropriate. Data was obtained from a total of sixteen companies out of twenty one [see appendix 2] where questionnaires were administered by use of both personal interviews and drop and pick later by the researcher.

4.1 Overview profile of respondents and organisations

To establish the profile of respondents they were asked to state their designations in business. It was important also to ascertain when the organisations were founded, whether they were wholly or partially owned and the number of permanent employees they had. The overall response rate was 72.7% with 16 out of the 21 respondents duly completing their questionnaires. After editing all the 16 were found to be usable and adequate for the purpose of the study. Most of the respondents in the study were senior managers in their organisations with 84.6% being the Managing Directors and 7.7% senior accounts officers. This made situations of questionnaire self administration easy due to high comprehension by the respondents. They had an in-depth understanding of their business and the industry.

Most of the organizations were locally owned [93.8%], this meant that all their resources were sourced locally and only 6.3% could tap into foreign or international resources and expertise. The bulk of the organizations [60%] operated with 10 or less permanent employees.

This indicated that they were small establishments that relied heavily on casual employment and getting big assignments. Table 1 below shows that most of the organizations [46.7%] were fairly young in the industry having been in operation for less than 3 years. Only one had operated for over 9 years. However the bulk of them were between 4 and 8 years old, this meant that they had a broad industry experience within quite a new industry.

Table 1: Period of Operation in Industry

		Frequency	Percent	Valid Percent	Cumulative Percent
	Less than 3 years old	7	31.8	46.7	46.7
	Between 4 & 8 years	7	31.8	46.7	93.4
	Over 9 years	1	4.6	6.7	100
	Total	15	68.2	100.0	
Missing	0	1	4.5		
	System	6	27.3		
	Total	7	31.8		
Total		22	100.0		

Source: Research data

4.2 Strategic Positions taken in the Promotional Marketing Industry

In order to understand the various strategic positions taken by promotional marketing firms in the changing environment the researcher collected and analyzed data under the following four sections:

i. Strategic Positions taken by promotional marketing organizations
ii. Types of services offered by promotional marketing organizations
iii. Types of clients
iv. Key success factors

4.2.1 Strategic Positions taken by promotional marketing organizations

Respondents were given three positioning options; cost leadership, differentiation and focus. They had options of three levels from high, medium to low from which they were required to rate in accordance to importance attached to each by their organizations.

Table 2: Strategic Position Options

	High		Medium		Low	
	Frequency	%	Frequency	%	Frequen cy	%
Cost Leadership	4	30.8	3	23.1	6	46.2
Differentiation	11	68.8	3	18.8	2	12.5
Focus	8	61.5	5	38.5	13	0

Source: Research data

Table 2 above evidently showed that differentiation at 68.8% scored much higher than cost leadership [30.8%] and focus [61.5] became a strong second. Cost leadership also scored highly at 46.2%, as the least popular strategic position option. Therefore business in this industry seemed to perceive differentiation as a major strength and opportunity to stay ahead of their competitors. In descriptive mean score we used a range of 1 as the lowest and 5 the highest in evaluation for strategic positioning in promotional marketing industry. Differentiation [2.81] rated as being the most important factor in positioning in the promotional marketing industry. Cost leadership [1.85] and focus [2.62] rated at lower levels.

The correlation data in Table 3 overleaf was to establish whether years of operation of the organization had any relationship with choice of strategic options. The organizations were divided into those below and those above 3 years in business. Differentiation, which had the highest preference in the frequency data above was still the outstanding preference.

This was amongst organizations over 3 years old siting a strong 90% preference. Cost of establishment and focus were a preference for organizations below 3 years both at 60% in high. Focus was much more preferred by below 3 years, to cost leadership. Overall those organizations over 3 years strongly preferred differentiation and those below 3 years old preferred the focus strategy.

Table 3: Correlation between year of establishment and cost leadership, differentiation and focus.

		Cost leadership		
		Low	Medium	High
Year of establishment	Below 3 years	20.0%	20.0%	60.0%
	Over 3 years	62.5%	25.0%	12.5%
		Differentiation		
		Low	Medium	High
Year of establishment	Below 3 years		60.0%	40.0%
	Over 3 years	10.0%		90.0%
		Focus		
		Low	Medium	High
Year of establishment	Below 3 years		40.0%	60.0%
	Over 3 years		37.5%	62.5%

Source: Research data

4.2.2 Types of services offered by Promotional Marketing Organizations

To establish the types of services offered in the industry, the questionnaire gave six options of the most common services provided; product launches, trade promotions, consumer promotions, merchandising, sports management and competitions.

As shown in Table 4 below the respondents were expected to indicate whether they offered certain services to their clients or not. Product launches [93.8%], consumer promotions [81.3%] and competitions were the most popular services. However on the overall most services were offered apart from sports management which was least offered at a 20% score. Product launches and consumer promotions had heavy frequency indicating that those were very competitive services.

Table 4: Types of Services offered

	Yes		No	
	Frequency	%	Frequency	%
Product launches	15	93.8	1	06.3
Consumer Promotions	13	81.3	3	18.8
Competitions	12	75.0	4	25.0
Merchandising	11	68.8	5	31.3
Corporate Functions	10	62.5	6	37.5
Trade Promotions	10	62.5	6	37.5
Display Solutions	7	43.8	9	56.2
Sports Management	3	20.0	12	80.0

Source: Research data

4.2.3 Types of Clients handled by promotional Marketing Organizations

In this section respondents were requested to name important clients they handled and categorize them as either consistent or seasonal. They were also required to specify the brands they handled for these clients. [See appendix 3 for details]. A summary of information collected indicated that the 16 responding organizations had two different sorts of clients, consistent and seasonal clients. All the organizations had consistent clients the most having 7 and the least having 2.

Brands in the consistent categories varied, such that some consistent clients had their whole portfolio serviced by one agency. Seasonal clients were fewer than consistent ones; one agency had no seasonal client while two organizations had one client each. The most seasonal clients any agency had were 7. In total all consistent clients [64] were more than seasonal clients [50]. Hence both categories of clients were equally important for the industry.

It was notable that promotional marketing organizations handled all the different array of brands from FMCG, communication, apparel, petroleum products, media, pharmaceuticals, supermarkets, schools, banking, corporate to name some. Several promotional organizations handled several big organizations' portfolio like BAT, Nation Media, Kenya Breweries, Unilever, Caltex, G/SmithKline both as seasonal and consistent clients. Some promotional marketing organizations worked with one client simultaneously each handling different brands or offering different services to the same organizations.

4.2.4 Key Success Factors in Promotional Marketing Industry

Respondents were given seven generic success factors and on a 5-likert-scale, with 1 for lowest and 5 for very highest. They were requested to rate them according to the level of importance they attached to each factor.

Table 5: Rating of Key Success Factors

	Very High	High	Slightly High	Low	Very Low
	%	%	%	%	%
Years of operation in industry	26.7	46.7	13.3	13.3	0
Experience of top management	56.3	12.5	25	0	6.3
Innovation/creative services	50	12.5	12.5	18.8	6.3
Offering of many services	18.8	31.3	37.5	6.3	6.3
Client size/portfolio handled	13.3	40	40	6.7	0
Affiliation with international agencies	20	13.3	13.3	13.3	40
Quality of service	56.3	25	6.3	12.5	0

Source: Research data

Table 5 above shows the percentages for each of the statements as were perceived by the respondents working in the industry. Experience of top management and quality of service offered both scored 56.3% at very high which showed these as the two key factors. Innovative/creative services were also strong success factors [50%]. Of least importance seemed to be affiliation with international agencies, which scored 40% at very low. In descriptive mean score we used a range of 1 as the lowest and 5 the highest in, evaluation for key success factors in promotional marketing industry. Experience of top management [3.88] and quality of service [3.69] stood out as important while affiliation with international agencies [2.47] and years of operation [2.6] did not score as high.

4.3 Discussion of factors influencing positioning decisions

This part of the study aimed at establishing factors that influenced positioning decisions in the promotional marketing industry. To this end data collected on the following topics was analyzed:

i. Self assessment of strength and weakness
ii. External and internal analysis of the environment
iii. Types of information gathered/methods used
iv. Competitor strength and weakness
v. Importance attached by individual organizations to various industry factors
vi. Importance attached to aspects of competition
vii. Important Positioning Parameters in the Industry
viii. Industry attractiveness
ix. Level & forces of competition in the Promotional Marketing Industry

4.3.1 Self Assessment of Strengths & Weaknesses

Respondents were requested to state what they viewed as their organization's three main strengths and three main weaknesses. Feedback was that most organizations thought their strengths lay in personnel related areas, delivery times, innovation/creativity and quality of service. The main weaknesses highlighted by 7 organizations related to client/portfolio size hence being small they over relied on a few clients. Further data revealed personnel as being too few, expensive and having low loyalty to the organizations. [See appendix 5 for details].

4.3.2 External and Internal Analysis of the Environment.

For any competitive organization interested in being continuously comparatively advantaged in its industry monitoring of the internal and external environment is a key activity. The findings in Table 6 below were as a result of asking respondents to indicate on the frequency of external environmental evaluation and respond using a five-likert-scale, the frequency ranged from; all the times, sometimes, rarely, if need arose and never. Data collected showed that a large percentage of organizations [75%] audited their environment all the time while 18.8% only did it when the need arose and only 6.3% did it sometimes.

Table 6: Frequency of evaluating the external environment

		Percent	Valid Percent	Cumulative Percent
Valid	all times	54.5	75.0	75.0
	sometimes	4.5	6.3	81.3
	if need arises	13.6	18.8	100.0
	Total	72.7	100.0	
Missing	System	27.3		
Total		100.0		

Source: Research data

4.3.3 Type of information gathered and methods used

The researcher also wanted to find out what type of competitor information was gathered. This was sort through asking respondents to briefly describe the type of competitor information they gathered. Ten of the organizations were mainly concerned about the client base of their competitor [any lost or acquired clients]. Five organizations were concerned about the volume of business their competitors handled, size of budgets, agency fees charged and income generated. Two organizations gathered information on the availability and quality of resources.

Information was mainly gathered through informal avenues as specifically pointed out by four organizations, hence through their supervisor trade reports, field visits and personal interviews. Clients themselves also provided information as indicated by 3 organizations. Two organizations used formal sources of data, specifically Kenya Revenue Authority, Marketing Society of Kenya and Registrar of societies. [See appendix 4 for details].

4.3.4 Competitors strengths and weakness

Analysis of the external environment was not complete without an assessment of the competition's strengths and weakness. Respondents were therefore requested to state their three main competitors and then indicate what they perceived their strengths and weaknesses to be. From Table 7 overleaf, company number 1 was mentioned as a major competitor by 50% of the total number of organizations. Otherwise competitors mentioned by most of the organizations were not exactly the same and seven organizations were mentioned only once, no organization went unmentioned as a competitor. Therefore these organizations were aware of each other and the competitive strength and weakness, yet not fully appreciative of the total universe of the industry players.

Table 7: Evaluation of major competitors

		Frequency of company mentioned as competitor	Valid Percent
Valid	Company Number 1	8	21.6
	Company Number 2	3	8.1
	Company Number 3	3	8.1
	Company Number 4	5	13.6
	Company Number 5	2	5.4
	Company Number 6	3	8.1
	Company Number 7	1	2.7
	Company Number 8	1	2.7
	Company Number 9	1	2.7
	Company Number 10	2	5.4
	Company Number 11	2	5.4
	Company Number 12	1	2.7
	Company Number 13	1	2.7
	Company Number 14	1	2.7
	Company Number 15	1	2.7
	Company Number 16	2	5.4
	Total	37	100.0
Missing	System	11	
Total		48	

Source: Research data

Competitor strengths were mainly seen in the light of availability of financial resources, large client size and portfolio, length of time in the industry [hence well known] and large/regional networks. Lack of creativity and innovation, economic ability, personnel related issues and lack of focus by competitors were some of the main weakness. The above findings had been able to influence the organizations' positioning decisions to enable them be more competitive in the industry. [See appendix 6 for details]

4.3.5 Importance attached by individual organizations to various industry factors

Under industry analysis respondents were given ten factors that shape an industry and asked to rate them on a 5-likert-scale from extremely important to not important at all. From Table 8 below, two parameters of the industry stood out as extremely important these were industry profitability [62.5%] and market size [50%]. Market growth rate [37.5%] and backward/forward integration [26.7%] were also indicated as highly important. Of least importance was scope of rivalry [18.8%] while not important at all were ease of exit [20% and ease of entry [12.5%].

Table 8: Industry Analysis

	Extremely Important	Highly Important	Moderately Important	Least Important	Not Important at all
	%	%	%	%	%
Market Size	50	31.3	12.5	0	6.3
Scope of rivalry	25	37.5	12.5	18.8	6.3
Industry profitability	62.5	25	6.3	0	6.3
Market growth rate	37.5	43.8	12.5	0	6.3
Backward/forward integration	26.7	33.3	26.7	0	9.1
Number of buyers and sizes	33.3	46.7	6.7	0	9.1
Capital requirement	18.8	25	37.5	12.5	6.3
Entry of major firms	26.7	33.3	26.7	13.3	0
Ease of entry	12.5	50	25	0	12.5
Ease of exit	13.3	53.3	13.3	0	20

Source: Research data

In descriptive mean score we used a range of 1 as the lowest and 5 the highest in, evaluation of important factors in the industry. The main factors are three, industry profitability [3.88], and market size [3.56] and entry of major competitors. Of least importance was ease of exit [2.6], ease of entry [2.5]. Notable is that there is not extreme in the means scores meaning that the higher rated factors did not stand out from the lowly ones hence the difference were not very significant.

4.3.6 Importance attached to aspects of competition

Aspects of competition were evaluated on a 5-likert-scale. Extremely important was the highest rating with, not important the lowest. The respondents [Table 9 below] indicated possible entrants [60%], at extremely high level. Marketing practices and goals of competitors were also very high, while extremely and highly important were combined both scored 73.4%. Financial strengths of competitors [10%] was the least important parameter followed by goals of competitors.

Table 9: Aspects of Competition

	Extremely Important	Highly Important	Moderately Important	Least Important	Not Important At all
	%	%	%	%	%
The number of your competitors	43.8	25	18.8	12.5	0
Possible new entrants	60	6.7	26.7	0	4.5
Current strategies used by competitors	43.8	25	18.8	6.3	6.3
Marketing practices	46.7	26.7	20	0	4.5
Physical and human resource of competitors	37.5	25	12.5	18.8	6.3
Goals of competitors	46.7	26.7	13.3	6.7	6.7
Financial strengths of competitors	30	40	10	10	10

Source: Research data

In descriptive mean score we used a range of 1 as the lowest and 5 the highest in, evaluation of aspects of competition in the industry. Possible entrants [4.00] and goals of competitors [3.6] rated slightly higher that physical and human resources of competitors [3.06] and financial strengths of competitors [3.1] which were the lowest. Lack of major difference indicated that these factors were almost all equally very important in the industry. This compared closely with the frequency findings above whereby data extremely important for all factors fall in the same range between 60% and 30%.

4.3.7 Important Positioning Parameters in the Industry

On a 5-likert scale the respondent were asked to specify for each of the nine parameters of positioning given a rating ranging from extremely important to not important at all. Results were as indicated on Table 10 overleaf; competition [56.3%] was the most popular positioning parameter, followed by managerial performance [53.3%] and being first in the positioning [50%]. Political, regulatory action [12.5%] was the least.

Table 10: Positioning Parameters

	Extremely Important	Highly Important	Moderately Important	Least Important	Not Important at all
	%	%	%	%	%
Appropriateness of positioning	43.8	31.3	6.3	18.8	0
Focusing on one positioning	43.8	6.3	31.3	18.8	0
Being the first in that positioning	50	31.3	0		9.1
Managerial performance	53.3	27.3	0	0	4.5
Political, regulatory action	25	12.5	37.5	12.5	12.5
Competition	56.3	18.8	12.5	6.3	6.3
Organizational structure	13.3	33.3	46.7	0	6.7
Economic environment	50	25	18.8	0	6.3
Technological change	33.3	13.3	33.3	6.7	13.3

Source: Research data

In descriptive mean score we used a range of 1 as the lowest and 5 the highest in, evaluation of positioning parameters in the industry. Competition [4.13], economic environment [3.63] and were the most important and tie in with frequency Table 10 above. Notable was that the other parameters did not vary significantly.

4.3.8 Industry Attractiveness.

The researcher sort to find out how the respondents rated the overall attractiveness of the industry, by simply ticking one amongst five measures ranging from extremely attractive to not attractive at all. From Table 11 overleaf, majority of respondents 81.3% rated this industry as extremely and highly attractive yet only 18% said moderately non of the 2 lower scales were picked meaning that all respondent generally agreed on the attractiveness of this industry as being quite high.

Table 11: Overall Rating of Industry Attractiveness

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Extremely attractive	3	13.6	18.8	18.8
	Highly attractive	10	45.5	62.5	81.3
	Moderately attractive	3	13.6	18.8	100.0
	Total	16	72.7	100.0	
Missing	System	6	27.3		
Total		22	100.0		

Source: Research data

4.3.9 Level & Forces of competition in the Promotional Marketing Industry

Data in Table 12 below was an assessment of respondents' perception of the level of competitiveness in the promotion marketing industry. Respondents were required to indicate whether it was high, medium or low. 87.5% of promotional marketing organizations thought that competition was high while only 12.5% thought it as medium. Therefore non-of the organizations thought that competition was low or non-existence. Hence need for positioning strategies in a competitive environment.

Table 12: Level of competition in the Promotional Marketing Industry

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	High	14	63.6	87.5	87.5
	Medium	2	9.1	12.5	100.0
	Total	16	72.7	100.0	
Missing	System	6	27.3		
Total		22	100.0		

Source: Research data

Additionally the researcher wanted to establish what the opinion of the respondents was on six forces that affected competition as shown on Table 13 below. They were required to use parameters that showed attractiveness on four levels from the extreme of highly attractive to highly unattractive. Highly attractive and middle attractive parameters for availability of substitutes were added up to get 58.3% making it the most attractive force of competition in the industry. This was followed by barriers to entry [50%] for highly and middle attractive. Least attractive force in the industry was government action [87% - highly unattractive] hence seen as of minimal interference with the industry.

Table 13: Forces of Competition

	Extremely Important	Mildly unattractive	Middle attractive	Highly unattractive
	%	%	%	%
Barriers to entry	28.6	21.4	21.4	28.6
Rivalry among competitors				
Bargaining Power of buyers/customers	14.3	57.1	21.4	7.1
Bargaining Power of suppliers	13.3	66.7	20	0
Availability of substitutes	16.7	25	25	33.3
Government Action	87.5	12.5	0	0

Source: Research data

In descriptive mean score we used a range of 1 as the lowest and 5 the highest in, evaluation of six forces of competition in the industry. Of greatest importance were barriers to entry [2.5] and availability of substitutes [2.35]. The forces of competitions did not fall too far below the average of 2.5, apart form government action that rated lowest at 1.13. Therefore government action was the least of a threat in the industry. This may be an indication that it's a small contributor to economy.

CHAPTER FIVE: SUMMARY CONCLUSIONS AND RECOMMENDATIONS

5.1 Conclusions

Promotional marketing industry was very young and most companies in this sector were less than four years old. Fifteen of these organizations were locally owned and only one was internationally affiliated. Industry profitability, market size and growth rate were key motivators appealing to current and potential investors in the industry.

These firms did not view as a threat ease of entry, even that of major firms, therefore rivalry and competition within these firms was not stiff and they happily co-existed in the same market. The portfolio of clients and brands handled supported this conclusion because we saw two or three promotional organizations working and sharing a portfolio of brands under one company. Organizations in this industry had both seasonal and consistent clients and seemed to exercise no discrimination by specializing within a specific clientele, industry, category of brands or types of corporations. The majority of them were agencies for the service industry, fast moving consumer goods, petroleum industry and pharmaceuticals industry.

Out of an array of eight main services offered in this industry, product launches (98.8%), Consumer promotions (81.3%) and competitions (75%) rated the highest hence the most popular services offered. Least popular were display solutions (43.8%) and sports Management (20%). It was concluded that some services were more popular with clients than others and therefore organizations skewed towards offering these services.

According to Schiffman & Kanuk (2000), strategic positioning involved deciding, how prospective clients in relation to their needs and competitors should perceive the organization. Key to positioning was finding a unique – niche that was not occupied by competitors. A focused competitor targeted the special needs of a subset of customers and designed its activities accordingly. Porter (1996) further emphasized that a strategic position is not sustainable unless there are tradeoffs with other positions. Positioning tradeoffs were pervasive in competition and essential to strategy. They created the need for choice and purposefully limited what a company offered. Therefore promotional marketing organizations needed to weigh their options and focus on positioning that gave them competitive advantage. Of the three main positioning strategies, differentiation [11%] was most popular and favorable to the promotional marketing organizations as compared to focus [8%] and cost leadership [4%]. However all organizations also chose either of the less popular positioning strategies [focus or cost leadership] as secondary strategies. According to Porter (1996) strategic positions emerge from three distinct sources, which were not mutually exclusive and often over-lapped. We therefore concluded that some organizations had overlapping positions despite differentiation emerging as the most popular. Strategic positioning was what you did to the mind of the prospect, changes made on a product, company, institution or even a person for the purpose of securing a worthwhile position in the prospect's mind.

Important industry positioning parameters were competition [56.3%] and a mean score of 2.75 and managerial performance [53.3%]. Clearly a few of these organizations had already positioned themselves by focusing on certain services, like sports management and display solutions which seems to be niche opportunities.

Product launches and consumer promotions had heavy frequency indicating that those were very competitive services. Therefore for clients to distinguish between service providers the promotional firms needed to use cost or differentiation to get business.

The outstanding key success factors in the industry were two; experience of top management [56.3%], quality of service [56.3%] and years of operation [26.7%]. The first and third were evidently inter-linked given that management experience results in period of business has been running. Paramount in organization self-assessment of weakness and strengths was size of client/portfolio size, this had a direct link to level of business available to the organizations. Most of them heavily relied on the large number of seasonal clients, which limited their capacity for stability and growth. This highlighted their need for larger client/portfolios. Not having permanent employees and lack of global affiliation were the key weaknesses amongst a majority of organizations.

5.2 Recommendations

i. To grow the business in the promotional marketing industry there was need to increase the total or primary demand for the services. Organizations in this sector needed to study companies and brands that can support promotional activities inject creative and innovative ideas to reach their consumers, increasing volumes and profits. Emphasis should have been on in-depth understanding of specific consumers and brands.

ii. Promotional marketing organizations also needed to enhance their focus on what they did best and find niche positioning which they were superior. Emphasizing on what they did best would ensure that the overall marketing fraternity identified each one of them as a specialized service provider in a certain activity as opposed to all of them being *jacks of all trades*. They needed to develop competitive and comparative advantages that could not easily be copied by others especially in having good quality personnel, being creative and innovative. This coupled with advertising would increase awareness of services they offered.

iii. Co-operation between companies would strengthen the industry position, they therefore needed to find ways of growing stronger as an industry and as individual entities. This could be a platform to cultivate bargaining power especially when dealing with large brands and clients.

iv. There was limited awareness amongst the promotional marketing industry of each other and forming a professional body could enhance, set working standards and increase their relevance to organizations, brands and overall industry. This could have been an avenue to ensure professionalism in service provision and given them an opportunity to tap into a shared human resource base minimizing their personnel training and loyalty concerns. A professional body can also be useful in creating an entry barrier to potential new comers.

v. These organizations needed to be proactive in getting international affiliation, which from the data they highlighted was important for them. This would have increased resources at their disposal and given them the opportunity to use standards and strategies in developed countries.

vi. Merging of some of these organizations would have given them advantages drawn from a bigger client bases and pooled resources. This may even have acted as an attraction to international firms interested in investing locally.

vii. They should also have looked for contractual affiliations with creative, media and other agencies which deal with some of the brands and they could together have offered a one-stop shop: as a forward or backward integration opportunity.

5.3 Suggestions for future research

i. This study had provided an understanding of positioning strategies, factors influencing strategy and given a general appreciation of industry's characteristics. There was need to further advance this research in relation to strategic formulation and strategic planning. This would have enabled the overall appreciation of how promotional marketing industry competed and suggested ways for the improvement and professionalization of a potentially crucial industry.

ii. The study was limited to Nairobi although the city had the majority of these organizations in Kenya, it would be an assumption to conclude that organizations in the rest of the country were similar. A regional study [most brands dealt with were regionally available] was recommended in order to negate or validate the findings in this study as being relevant to all promotional marketing organizations in the country or the region.

5.4 Limitation of the study

i. The study was limited to Nairobi and its environs. A regional study was required to confirm these findings.

ii. Lack of finances and time constraints limited a deeper in-depth assessment of the promotional marketing organizations.

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APPENDIX 1: QUESTIONNAIRE

SECTION A: COMPANY DATA

1. Title of respondent:________________________________
2. Year of company establishment:______________________________
3. Percentage of local ownership_________________
4. How many employees do you have as permanent? ________________

SECTION B: CORPORATE POSITIONING

1. Please list your perennial clients and brands you handle?

Company	*Brand*
________________________	________________________
________________________	________________________
________________________	________________________
________________________	________________________
________________________	________________________
________________________	________________________

2. Please list you seasonal clients and brands you handle?

Company	*Brand*
________________________	________________________
________________________	________________________
________________________	________________________
________________________	________________________
________________________	________________________
________________________	________________________

3. Which of the following would you rate as your key success factors? (Please tick)

	Scale: 1. lowest				5. highest
1) Years of operation in industry	1	2	3	4	5
2) Experience of top management	1	2	3	4	5
3) Innovation/Creative services	1	2	3	4	5
4) Offering of many services	1	2	3	4	5
5) Client size/portfolio handled	1	2	3	4	5
6) Affiliation with international agencies	1	2	3	4	5
7) Quality of service	1	2	3	4	5
If other specify:					
8)	1	2	3	4	5

4. Which of the following services do you offer to your clients?

	If service is offered please tick
1) Product launches	
2) Trade Promotions	
3) Consumer Promotions	
4) Merchandising	
5) Sports Management	
6) Competitions	
Please specify other services you offer not named above.	
7)	
8)	
9)	
10)	

5. Of the three positioning options below which do you rate as most important in your strategy?

	Level of Importance 1 low & 3 high		
1) Cost leadership	1	2	3
2) Differentiation	1	2	3
3) Focus	1	2	3

6. Which of the following teams in the table below in your organization's operational structure are important?

	Scale: 1. lowest				5. highest
Merchandisers team	1	2	3	4	5
Push girls team	1	2	3	4	5
Creative team	1	2	3	4	5
Entertainers team	1	2	3	4	5
	1	2	3	4	5
	1	2	3	4	5

7. Are the teams below on full employment or temporary (please tick)?

	Temporary Employment	**Full time Employment**
Merchandisers team		
Push girls team		
Creative team		
Entertainers team		

8. How well do the following teams understand the strategic positioning of your organization? (Please tick)

	1. Low Understanding				**5. High Understanding**
Merchandisers team	1	2	3	4	5
Push girls team	1	2	3	4	5
Creative team	1	2	3	4	5
Entertainers team	1	2	3	4	5
	1	2	3	4	5
	1	2	3	4	5

SECTION C: EXTERNAL & INTERNAL ANALYSIS

1. Does your organization audit/evaluate factor in the external environment? (Please tick)

   Yes:________________ No: ____________________

2. What is the frequency?

- ☐ All the times
- ☐ Sometimes
- ☐ Rarely
- ☐ If need arises
- ☐ Never

3. Please rate the positioning parameters below according to their importance in your industry.

	Scale: 1. lowest				5. highest
Appropriateness of positioning	1	2	3	4	5
Focusing on one positioning	1	2	3	4	5
Being the first in that positioning	1	2	3	4	5
Managerial performance	1	2	3	4	5
Political, regulatory action	1	2	3	4	5
Competition	1	2	3	4	5
Organizational structure	1	2	3	4	5
Economic environment	1	2	3	4	5
Technological change	1	2	3	4	5

1. What do you consider to be your company?

i. Strengths

1. ______________________________________
2. ______________________________________
3. ______________________________________

ii. Weaknesses

1. ______________________________________
2. ______________________________________
3. ______________________________________

SECTION D: INDUSTRY ANALYSIS

1. How would you describe the overall industry attractiveness? (Please tick)

- ❑ Extremely attractive
- ❑ Highly attractive
- ❑ Moderately attractive
- ❑ Least attractive
- ❑ Not attractive at all

2. How important does your company consider the following factors in the industry? (Please tick)

Scale: **1. lowest** **5. highest**	**1**	**2**	**3**	**4**	**5**
Market Size	1	2	3	4	5
Scope of rivalry	1	2	3	4	5
Industry profitability	1	2	3	4	5
Market growth rate	1	2	3	4	5
Backward/forward integration	1	2	3	4	5
Number of buyers and sizes	1	2	3	4	5
Capital requirement	1	2	3	4	5
Entry of major firms	1	2	3	4	5
Ease of entry	1	2	3	4	5
Ease of exit	1	2	3	4	5

SECTION E: COMPETITOR ANALYSIS

1. Briefly describe the level of competition in the promotional marketing industry.

____

____

2. How strong does your company consider the following forces of competition to be in the industry? (Please tick)

Scale: **1. lowest** **4. Highest**	Highly unattractive	Mildly unattractive	Middle attractive	Highly attractive
i. Barriers to entry				
ii. Rivalry among competitors				
iii. Bargaining Power of buyers/customers				
iv. Bargaining Power of suppliers				
v. Availability of substitutes				
vi. Government Action				

3. Do you gather information about your competitor? (Please tick)

☐ Yes
☐ No

4. If yes, briefly describe:

i. Type of information gathered

____

____

ii. How the information is gathered

____

____

5. Please indicate the level of importance your company attaches to the following aspects of competition

Scale: **1. lowest** **5. highest**	**1**	**2**	**3**	**4**	**5**
The number of your competitors	1	2	3	4	5
Possible new entrants	1	2	3	4	5
Current strategies used by competitors	1	2	3	4	5
Marketing practices	1	2	3	4	5
Physical and human resource of competitors	1	2	3	4	5
Goals of competitors	1	2	3	4	5
Financial strengths of competitors	1	2	3	4	5
Other – Please specify					
	1	2	3	4	5

6. Which companies do you consider to be your 3 major competitors? Please list starting with the most important.

   1. ______________________________
   2. ______________________________
   3. ______________________________

7. What do you consider to be their:

   i. Strengths/capabilities

   1. ______________________________
   2. ______________________________
   3. ______________________________

   ii. Weaknesses

   1. ______________________________
   2. ______________________________
   3. ______________________________

THANK YOU

APPENDIX 2: PROMOTIONAL MARKETING COMPANIES IN KENYA

	Company Name	Telephone	Email	Contact
1	Ad-Venture Promotions	3745508	Ramesh@ccl.co.ke	R. Shah
2	Associated Promotions	4440667	helenatav@yahoo.com	Helen Tavaras
3	Broadbase Promotions Ltd	242066/ 212945	Savannahlands@wananchi.com	Tabitha Mutemi
4	Bush stock	4349076	Bushman@wananchi.com	S. Lentz
5	Catalyst Africa		Chaines@mccann-kenya.com	C. Haines
6	Exclamation Marketing	4442266	Exclamation@wananchi.com	S. Omanga
7	Exp. Momentum	828020-3	Winterndeda@expmomentum.co.ke	M Kershaw
8	Extra Edge	249150	Wambui@eedge.co.ke	J. W Odewale
9	Face to Face	4348047	Dokeyo@hotmail.com	A. Kabinga
10	Gap Promotions	531741	gap@insight.com	P. Gachago
11	Impulse Promotions	570992	Btl@implulsepromotions.com	F. Rabongo
12	In-store Promotions	825206	Koome@bidii.com	Mr. Koome
13	Marketing Support Services	340799	*Syong'o@mss.com*	Z. Syong'o
14	Professional Marketing Services	448103	Joannemwangi@yahoo.uk	J. Mwangi
15	Regional Reach	217963	gembua@yahoo.com	R. Kimotho
16	Sports Pro	253751	Nyamu@yahoo.co.uk	K. Nyamu
17	Spread Marketing	728100	Spreadmarketing@bidii.com	P. Wanjama
18	Sprint Promotions limited	44446321	Mwaura@sprint.co.ke	J. Mwaura
19	Target Promotions	542135	Kmwangi@target.com	K.Mwangi
20	Top Image	504906	Topimage@nbnet.co.ke	J. Barraza
21	True Blaq	224039	trueblaq@hotmail.com	K Ombajo

Source: Marketing Society of Kenya 2003

APPENDIX 3: CONSISTENT & SEASONAL CLIENTS AND BRANDS HANDLED

Company Id	Consistent Clients &Brands		Seasonal Clients Brands	
	Company	**Brand**	**Company**	**Brand**
COO1	KBL	Pilsner Ice	Caltex	Events
	Colgate Palmolive	Colgate	Sara Lee	Hair Glo
	BDF	Nivea	Reckitt Benkiser	Dettol,Doom
COO2	KBL	Tusker Pilsner	Unilever	Blueband
	BAT	Sportsman		
	Total	Lubricants		
COO3	Everready	Eveready Batteries	Cosmos	Painotab
	Glaxosmithkline	Cofta/Bronchomint	Harleys	Deep Heat
	Unilever	Omo	Hasika	Farm Machinery
	Kapa Oil	Tily	Kenital	Solar Panels
	Capwell Industries	Soko Flour		
	PSI	Trust Condoms		
COO4	Sara Lee	Kiwi	Unga Ltd	Unga Feeds
	Unilever	Omo& Blueband	G/Smithkline	Panadol
COO5	Uchumi	Supermarkets	Psi	Trust
	Kenya Breweries	Kane Extra	Kenya Airways	Various
	G/Smithkline	Aquafresh	Kapa Oil	Toss &Prestige
	BDF	Limara	Wrigleys	Orbit
	Nestle Foods	Milo	Multichoice	DSTV
	Kencell	Yes!		
COO6	Kenya Breweries	Tusker	Nation Media	Nation Newspapers
	Coca-Cola	Coke	Unilever	Close-up& Royco
	Safaricom Ltd	Safaricom		
COO7	Safaricom/Tequila	Safaricom	Safaricom/Tequila	Safaricom
	UDV	Smirnoff	UDV	Smirnoff
	GSK	Aquafresh/ Lucozade	Capital FM	Various
	Capital Fm	Various		
	The Carnivore	Various		

APPENDIX 3: CONSISTENT & SEASONAL CLIENTS AND BRANDS HANDLED

continued

Company Id	Consistent Clients &Brands		Seasonal Clients Brands	
COO8	Bel international	The laughing cow cheese	L3communications	L3 Telecom div
	Equity building society	All		
	Deacons	Woolworths,Truworths		
	Wanainchi online	All	Korea trade centre	Events
	Farmers choice	All	Airseal	Tiremilk
	Postbank	All	Kenya capital partners	Aureos
COO9	Unilever	All brands	N/A	N/A
	BAT	Sportsman		
	Reckitt benckiser	Dettol &Veet		
	Kencell	Service		
COO10	Ketepa	All brands	Brookside	Ilara
	BAT	All brands		
	Sara lee	Hairglo-Hairworks		
	KBL	Malta ,Guiness		
	Spin knit	Flava &Tuzo		
	Nestle Foods	All brands		
COO 11	United Nations	Heart &soul	Tusker/KRFU	Safari sevens
	British council	Corporate	KBL	Pilsner
	IAT	Ufunguo scholarships	Unilever/Ashleys	Miss world/Kenya
			Aeroclub	Airshow
			Standard chartered	Nairobi marathon
COO 12	G/Smithkline	Actifed	Super ssleek	Topex
	Harleys	Stamina,Deepheat	Phoenix	Cheetah matches
	Interconsumer	Goldshine shoepolish	Weetabix	Weetabix
	Elli Lilly	Cialis	Ashut engineers	Ashut furniture
	Jambo	Britannica biscuits	Cooper	Milking salve
	Roche	Fansidar	3M	Corporate
	Ceva	Veliben,Vermitan	Organix	Vipul,Achook
COO13	KBL	Pilsner ice	Unilever	

APPENDIX 3: CONSISTENT & SEASONAL CLIENTS AND BRANDS HANDLED

continued

Company Id	Consistent Clients &Brands		Seasonal Clients Brands	
COO13	KBL	Pilsner ice	Unilever	
	Sara lee	Kiwi,Miss	BDF	Dove
	Farmers choice	All meat products		
COO14	CFC	Stock broking	Caltex	Corporate
	Aga khan	Corporate	Premier Academy	Education
COO15	KBL	Guinness	Kenol	All products
	BAT	Lights	LG	All electronics
			Coca cola	Sprite
			Brookside	Milk
COO 16	Eldoville	yoghurt	Nestle	All
	UDV	Kenya cane	Mumias	Sugar
	StandardNewspaper	Corporate	Ketepa	Tea

APPENDIX 4: COMPETITOR INFORMATION

Company Id	Type Of Information Gathered	How Information Is Gathered
COO1	▪ Number of clients ▪ Size and cost of promotion	Observation, talks with competitors and competitor clients
COO2	Not indicated	Not indicated
COO3	▪ Programming ▪ Timings ▪ Audience ▪ reach	▪ Through supervisors weekly field reports ▪ Research
COO4	▪ Financial capacity ▪ Level of penetration	Not indicated
COO5	▪ Competitor clients, and turnover	▪ From clients during counter pitching ▪ Kenya revenue authority ▪ Marketing society of Kenya ▪ Registrar of societies
COO6	▪ Pricing, ▪ Staff remuneration, ▪ Company capabilities, ▪ Client portfolio	▪ Informal ways
COO7	▪ Competitor Projects ▪ Mode of execution ▪ Budgets ▪ Execution time periods	▪ From service providers
COO8	▪ Current projects ▪ Clients gained or lost ▪ Quality of resources	▪ Market intelligence ▪ Field visits
COO9	▪ Current projects ▪ Clients portfolio and satisfaction	▪ Informal
COO10	▪ Cost per push girl ▪ Agency fees	▪ From previous employees and also clients
COO11	Not indicated	Not indicated
COO 12	Not indicated	▪ Personal interviews ▪ Informal discussions
COO13	▪ New clients ▪ Area of specialization ▪ Resources available	▪ Observation ▪ Informal research
COO14	▪ Client base ▪ New jobs/clients	▪ Media channels ▪ Informally
COO15	▪ Client base ▪ Nature of contracts	▪ Clients
COO16	▪ Client base ▪ Volume of business (revenue	▪ Media monitoring ▪ Marketing forums

Source: Research Data

APPENDIX 5: COMPANY STRENGTHS & WEAKNESS

Company Id	Strengths	Weaknesses
COO1	▪ Quality of service ▪ Highly motivated staff ▪ Attention to detail	▪ Number of client/portfolio size ▪ Cost of teams
CO02	▪ Creativity, Uniqueness, ▪ Speed	▪ Irregularity ▪ Use of part-time employees-no loyalty
CO03	▪ Unique medium ▪ Knowledge of market & Monopoly	▪ No live broadcasting ▪ Limited audience each
CO04	▪ Industry experience ▪ Quality of service & Financial ability	▪ Poor penetration
CO05	▪ Flexibility ▪ Experience of key individuals ▪ Business culture	▪ Small team ▪ Limited financial resources
CO06	▪ Countrywide network ▪ Experienced staff ▪ Effective supervision	▪ Lack of creative team ▪ Lack of international affiliates
CO07	▪ Innovativeness ▪ Motivated staff	▪ Small size ▪ Inadequate finance
CO08	▪ Professional team ▪ Proven track record	▪ Lack of global affiliates
COO9	▪ National presence ▪ Knowledge of market ▪ Staff loyalty	▪ Over reliance on few clients
COO10	▪ Management ▪ Quality of service & Creativity	▪ High pricing
COO 11	▪ Creativity, Innovation ▪ Integrated marketing strategy development ▪ System coordination	▪ Limited physical/human resource ▪ Limited investment capital ▪ Weak networking capacity
COO 12	▪ Industry Experience ▪ Quick turn around ▪ Proven marketing support	▪ No international affiliation ▪ Small creative team ▪ Insufficient experience in media advertising
COO13	▪ Client base ▪ Client driven strategy	▪ Small capital base ▪ Mergers
COO14	▪ Good image & Innovative	▪ Few clients
COO15	▪ Industry experience ▪ Consistent clients	▪ Getting new clients
COO16	▪ Creativity ▪ Timeliness	▪ Getting long term contracts

Source: Research Data

APPENDIX 6: MAJOR COMPETITORS

Company Id	Major Competitor	Competitor Strengths	Competitor Weakness
COO1	▪ Impulse ▪ Gap promotions ▪ Top image	▪ Years of operation in industry ▪ Client size and portfolio	▪ Quality of service ▪ Inflated costs ▪ Poor staff remuneration
COO2	▪ Impulse ▪ Gap	▪ Big clients ▪ Use of permanent employees (loyalty)	▪ Lack of creativity
COO3	▪ Media matrix	▪ Targeted audience	▪ Focus on a limited audience
	▪ Mobile cinema	▪ Long period in industry	▪ Target audience has no purchasing power
COO4	▪ Impulse ▪ Gap	▪ Financial capacity ▪ Wide network	▪ Lack of diversity ▪ Lack of creativity
COO5	▪ Experiential momentum ▪ Impulse promotions	▪ Regional network ▪ Experienced ▪ Well known in market	▪ High costs ▪ No local stakeholders (Experiential)
COO6	▪ Target ▪ Top image ▪ Gap	▪ Experience in the market	▪ Poor supervision
COO7	▪ Centre stage Ltd ▪ Bushshock Ltd ▪ Home Boyz Ltd	▪ Innovation ▪ Availability of capital	▪ Too diversified ▪ Lack of attention to detail
COO8	▪ Scanad lowe ▪ O&M ▪ TBWA	▪ Global affiliates ▪ Financial strength ▪ Large workforce	▪ Poor quality-(sometimes) ▪ Prohibitive pricing structure ▪ Unqualified staff

APPENDIX 6: MAJOR COMPETITORS **continued.**

COO9	▪ Target ▪ Impulse ▪ MSS ▪ Instore	▪ Size ▪ Key clients	▪ Logistics
COO10	▪ Impulse ▪ Gap ▪ Target	Good relations with brand mangers	▪ Quality of push girls ▪ Poor management practices
COO11	▪ Momentum ▪ Silver bullet ▪ Media plus	▪ Market experience ▪ International affiliation	▪ Limited in innovation ▪ Unrealistic pricing ▪ Weak marketing and strategic development
COO12	▪ Scanadlowe ▪ O&M ▪ McCann	▪ International affiliation ▪ Big size ▪ Big creative team	▪ Poor marketing support ▪ Impersonal service ▪ Slow turn around
COO13	▪ Impulse	Client base	Preference for large clients
	▪ Top image ▪ McCann	▪ Aggressive ▪ Capital and other resources	Lack of focus
COO14	▪ Target ▪ Catalyst	▪ Long term contracts ▪ Wide Client base	▪ Lack of innovativeness
COO15	▪ Impulse ▪ Face to face ▪ Expo momentum	▪ Strong Financial base ▪ Wide product range	▪ Not creative ▪ Not aggressive
COO16	▪ Catalyst ▪ Marketing services ▪ Expo momentum	▪ Industry experience	▪ Too many jobs ▪ Handling too many jobs