

**INDUSTRIAL CONSUMERS PERCEPTION OF ATLAS COPCO BRAND AND
MARKET SHARE A CASE OF INDUSTRIAL COMPRESSORS IN NAIROBI,
KENYA**

BY

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Requirements for award of the Degree of Master of Business
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DECLARATION

Student's Declaration

This research project is my original work and has not been submitted in any other University.

Signature:

Date

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D61/75460/2012

Declaration by Supervisor

This research project has been submitted for examination with my approval as the university supervisor.

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DEDICATION

To my two sons Gerald and Karl Peters and my lovely wife Mrs. Helen Jayo for being my daily inspiration.

To my mother Mrs. Mary Misiani and my Late father Mr. Sospeter Misiani for nurturing and moulding me to what I am today.

To my present employer Atlas Copco Eastern Africa limited for believing in my capabilities.

ABSTRACT

The study was set out to determine consumers' perception of Atlas Copco brand and market share of the industrial compressor. The objectives of the study were to establish the consumers' perception of the Atlas Copco brand and determine the market share of the Atlas Copco industrial compressors. The research adopted the descriptive survey research design while the sampling design adopted was the systematic random sampling design. The total population was 264 consumers and a sample of 100 customers was drawn using the systematic sampling design. A structured questionnaire was used to collect data. The method of data collection was mainly through electronic mail and personal visits. In this study, one hundred questionnaires were distributed, but only seventy six useable questionnaires were realized. Questionnaires were coded and edited for completeness using the Statistical Package for Social Sciences (SPSS). The data collected was analyzed using frequencies and percentages.

All quantitative data was analyzed using mean and percentages to determine the effect of industrial consumers' perception and market share. Qualitative analysis was only carried on those aspects of the data that were quantifiable. The findings are presented in form of tables and percentages or means obtained quantitatively. The research was able to determine that majority of the respondents would purchase the industrial compressors again; recommend the industrial compressors to friends and prospective buyers. Based on the findings consumers' perception relates to product attributes, customer values and market share. Also key to note was that the industrial consumers' were not so keen on energy efficiency, quality of air, and noise levels of the industrial compressor.

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ABBREVIATIONS AND ACRONYMS

ACEA Atlas Copco Eastern Africa Limited

B2B Business To Business

SPSS Statistical Package for Social Sciences

dB Decibels

PET Polyethylene Terephthalate

UNICEF United Nations Children's Fund

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CHAPTER ONE: INTRODUCTION

1.1 Background of the Study

The marketing environment has changed, posing serious challenges to the survival and profitability of firms. Among the changes are globalisation, financial downturn and completion. The changes have affected companies globally including Africa and Kenya in particular. For instance the global economy is yet to fully recover from the severe financial downturn. This year, the World Bank forecasts Kenya's economic growth rate to reach 5.7% in 2013 and 6% in 2014 (Kenya Economic Update, 2013). The country is still in the recovery path from the post-election violence of early 2008 and the longest and extremely dry weather condition since the 1960's.

Wright (2006, p122) argues that:

All organisations attempt to position themselves in the market according to their target market and brand values against products of their competitors. For example, Ford markets a range of cars for different target markets. The Ka is seen as a second car, the Range Rover is the prestige conscious Sport Utility Vehicle market, the Jaguar is for the unassuming wealthy and so on. No matter that the Jaguar now has a Ford engine, as long as it still carries the kudos, glamour, status and wealth association of the Jaguar of old. Ultimately positioning has to take place in the minds of the consumer and it is all about perception.

For each individual, reality is a totally personal phenomenon, based on that persons need, wants, values and personal experiences. Individuals act and react on the basis of perceptions, and not on the basis of objective reality. The knowledge of consumers' perception is thus, paramount to every marketer than their knowledge of objective reality. For if one thinks about it, it's not what actually is so but what consumers think is so that affects their actions, their buying habits which affect the market share. The essence of

successful marketing is the image or perceptions that a product has in the mind of the consumer – that is, its positioning. Positioning is more important to the ultimate success of a product than are its actual characteristics (Shiffman et al, 2008).

Today, consumers have greater access and control over the information from which their perceptions about a brand are created. The ideas and impressions organisations might hope the consumer to have about brands are subject to the competing ideas, which are available for consumer perception (Kotler & Pfoertsch, 2006). According to Schiffman and Kanuk (2009) regardless of how well positioned a product appears to be, the marketer may be forced to reposition it in response to market events, such as a competitor cutting into the brands market share or too many competitors stressing on the same attribute, or to satisfy changing consumer preferences with good insight on consumers' perception.

1.1.1 The Concept of Industrial marketing

The concept of industrial marketing also known as business to business marketing (B2B) is used to describe marketing activities targeted at all individuals and organizations that acquire products and services that are used in the production of other products and services. These products include capital goods (buildings, land and machines), operational products (accessory equipment, supplies, maintenance services), and output products (raw materials, components, production services). One of the distinctive differences between industrial and consumer markets is that the demand for industrial products is a derived demand, meaning that the magnitude of demand for these products varies with the demand for the finished products and services based on them. The

purchasing process of industrial products is also relatively more complex, and may be divided into a number of stages taking place over time (Kuada, 2002).

McDonald and Meldrum (2013) argues that the best way to conceptualize industrial marketing is to look at it as a continuum with obvious slow-moving industrial products at one end and fast-moving consumer products at the other. In the middle of the continuum are faster moving industrial products and slower moving consumer products.

1.1.2 The Concept of Consumer Perception

The concept of perception addresses the basis of human behaviour in encounters with other social actors. It is generally acknowledged that human perceptions are informed by prior experiences, knowledge, expectations and understanding. In fact people perceive more than they actually see in any given situation (Crossley, 1996) since individuals tend to use their previous knowledge and experiences to ascribe meaning to what their senses register. Most often individuals hold firmly to their perceptions, believing them to be right. Perception is defined as the process by which an individual selects, organizes and interpret stimuli into a meaningful and coherent picture of the world (Shiffman et al, 2008). Perception is the meaning an individual adds or subtracts to the information he/she receives through the sensory organs. The incoming stimuli interact with the stored information (memory) to give rise to perception (Kumar, 2009).

Therefore, buyers carry different perceptions about organizations, based on some previous encounters with them or information received about them from external sources. It is prudent for organizations to be aware of how potential buyers perceive them prior to making any sales effort. Product and service attributes that have been found to influence

customers' perception of the offerings include quality, reliability, post-delivery arrangements, price, and conditions of payment. Similarly customers' perception of the organization's salespeople will be based on the criteria such as reliability, credibility, responsiveness, product knowledge, persuasiveness, knowledge about competitors, oral communication, personal charm/friendship as well as mutual trust and respect (Shiffman et al, 2008).

1.1.3 Concept of Market Share

The essential reason for defining a market and examining a firm's market is to make inferences about market power. Company or brand sales, measured in volume or in value, are the most direct measures of the market behavioral response. Sales analysis can be misleading, however, since it does not reveal how the brand is doing relative to competing brands operating in the same reference market. For example, an increase in sales may be due to a general improvement in market conditions and have nothing to do with the brand's performance, or the increase may be hiding a deterioration of the brand's position, for instance if it has grown, but less than its rivals. To be useful, sales analysis must therefore be complemented by a market share analysis. The reason for measuring market share is to eliminate the impact of environmental factors, which exert the same influence on all competing brands and thus allow a proper comparison of the competitive power of each (Kotler, 1991).

Market share can be measured in three ways: Overall market share is the company's sales expressed as a percentage of total market sales. Served market share is its sales expressed as a percentage of the total sales to its served market. Its served market is all the buyers

who are able and willing to buy its product. Served market share is always larger than overall market share. A company could capture 100 percent of its served market and yet have a relatively small share of the total market. Relative market share can be expressed as market share in relation to its largest competitor. A relative market share over 100 percent indicates a market leader. A relative market share of exactly 100 percent means that the company is tied for the lead. A rise in relative market share means a company is gaining on its leading competitor (Cooper & Nakanishi, 2010).

Market share is an indicator of how well a firm is doing against its competitors. This metric, supplemented by changes in sales revenue, helps managers evaluate both primary and selective demand in their market. That is, it enables them to judge not only total market growth or decline but also trends in customers' selections among competitors. Generally, sales growth resulting from primary demand (total market growth) is less costly and more profitable than that achieved by capturing share from competitors. Conversely, losses in market share can signal serious long-term problems that require strategic adjustments. Firms with market shares below a certain level may not be viable. Similarly, within a firm's product line, market share trends for individual products are considered early indicators of future opportunities or problems (FT Press Delivers, 2010).

1.1.4 Manufacturing Sector in Kenya

Manufacturing is the art of transformation of raw materials into either intermediate goods or final products through mechanized process. The manufacturing sector comprises of the following sub-sectors: Agro-processing industries comprising of food, biotechnology, textile, leather, beverages and tobacco, paper, wood and wood products. Metal,

metallurgy and construction comprising of foundries and forges, secondary steelmaking facilities, pipes and tubes, wire and wire products, general metal fabrication, machine tools and allied, plant and machinery manufacture, body building and motor vehicle assembly and accessories. Electricals, electronics and ICT comprising of electronics machinery appliances, ICT software and hardware development, electrical components. Chemicals comprises of petrochemicals, fertilizers, industrial chemicals, coatings and adhesives, catalysts, industrial solvents and gases, resins, plastics, agrochemicals and pharmaceuticals. Mining and quarrying comprises of gemstones and precious minerals, industrial minerals, heavy minerals and building stones (www.kam.co.ke/).

1.1.5 Atlas Copco Eastern Africa Ltd

The Company was incorporated in Kenya in 1936 under the name Craelius East Africa Drilling Company limited, dealing in drilling of water boreholes and gold exploration. In 1978 the Company acquired the name, Atlas Copco Kenya Limited. In 2005 the Company acquired its present name, Atlas Copco Eastern Africa Limited after serving surrounding markets in the wider Eastern Africa Region of Ethiopia, Eritrea, Somalia, Djibouti, Tanzania, Uganda, Sudan, Mauritius, Madagascar, Somalia and Djibouti through direct contact as well as a comprehensive distributor network (www.atlascopco.com/ke).

Atlas Copco Industrial compressors uses various technologies for compression and drying of air including: reciprocating, rotary screw and centrifugal air compressors as lubricated or oil free machines ; refrigerated, desiccant, membrane and heat of compression air dryers ; air line filters; and air distribution systems . These air

compressors are divided into two; stationary and portable types. The portable compressors are mainly used in the construction and mining sector whereas the stationary type in the manufacturing sector. The standard compressors range from as low as 1.5 KW to 900KW in terms of power ratings and pressure ratings of from 1bar -80 bar. The compressors are used in several applications in the manufacturing industries including conveying of material, use in pneumatic tools and machines, diffusion aeration in case of waste water plants, blowing of PET bottles among others

(<http://www.atlascopco.com/usus>).

Air easily flows through pipes and valves, quickly filling a space. It can be compressed to higher pressures, stored as energy, and used to perform many types of work processes when the pressure is relieved. Compressed air is so versatile that, like electricity or water, it is often considered another utility (<http://www.atlascopco.com/usus>).

1.2 Research Problem

In the current competitive market, organisations have been fighting to remain profitable and sustainable. The industrial consumers have been forced to adopt measures that will reduce their costs of production in order to remain competitive. One of the areas that determine their success is the perception of the consumers towards the industrial products. This has led to emergence of several suppliers using different strategies to gain market share. In this process consumers have perceived firms differently which determines their buying decision. It is therefore important for an organisation to know how the industrial consumer perceives it to establish brand strategies that will help it

remain profitable and sustainable. Brand management for industrial goods and services represents a unique and effective opportunity for establishing enduring, competitive advantages (Kotler, 2006).

There has been increased competition amongst the compressed air industry providers in the manufacturing sector owing to increased appetite in the frontier markets from investors despite the effects of the financial crisis in Europe, the USA and by extension the African nations. Compressor manufacturers and suppliers must therefore ensure they have competitive advantage in the market by trying to get a maximum share of mind from the consumers. This will ensure that what they stand to offer in the market is clear and distinct. The image therefore created will remove doubts in the minds of industrial consumers and distinguish one compressor supplier from another.

Several studies have been conducted on the aspect of perception both internationally and locally. Kileba (2001) did a study on the effect of consumer perception on marketability of new products; the case of Kenya commercial banks Bankika accounts. Wanjau (2001) did a study on the influence of brand personality on consumer's choice: the case of malt based non-alcoholic drinks in Nairobi, Kenya. Wasonga (2003) did a study on the factors affecting consumer perception of Kenyan manufactured fast moving consumer goods in the east African community; a case of laundry detergents products. Wandate (2012) did a study on Management Perception of the Influence of Corporate Social Responsibility on Performance of Equity Bank Limited. Mugita (2012) did a study of the Perception of Managers on Satisfaction of Retail Customers at the Kenya Commercial Bank. Ukpebor and Ipogah (2008) did a study to indicate the importance of consumer based-brand equity

on consumer perception of brand a case study of fast food restaurants. Berger, Draganska and Simonson (2006) did a study of the influence of product variety on brand perception and choice.

To the best of the researcher's knowledge, no study has been undertaken on the Industrial Consumers' perception of Atlas Copco Brand and Market share. The company is facing a threat of increased competition from new players such as ELGI, Ingersoll rand, Kaeser, Boge among others and thus the need to know where and what actions to be implemented to remain competitive. It was necessary to conduct a study with the view to establish how the industrial consumers' perception affects Atlas Copco Eastern Africa Ltd market share.

This study seeks to close this knowledge gap by attempting to answer the following research question:-

What is the industrial consumers' perception on Atlas Copco Industrial compressor brand and how does it relate to market share?

1.3 Research Objectives

The objectives of this research were:

- i.) To establish the Industrial consumer's perception of Atlas Copco compressor brand.
- ii.) To determine the relationship between industrial consumers' perception and market share of Atlas Copco compressor brand.

1.4 Value of the study

The study may be used by the organization to develop sustainable and competitive strategies to develop and retain their customers based on the perceived information. By understanding these perceptions various stakeholders including foreign investors will be able to develop clear ways of getting a good perceptual image. This in turn will help positively influence employee's long term commitment towards their organizations in order to gain market share and achieve desirable performance.

Government agencies and policy makers may use the findings to formulate positive national policies based on a framework that is relevant and sensitive to forces that influence consumers' perception in a business operating environment.

Finally the study will be of great value to future scholars and researchers by stimulating future research to develop a better understanding of positioning strategies and best practices in Kenyan firms as well as the greater Eastern Africa regional economic block.

CHAPTER TWO: LITERATURE REVIEW

2.1 Introduction

This chapter discusses the concepts of market share and perception with a focus on the industrial marketing. It will outline the connection between the two if any relationship exists. It will also touch on the literature on industrial marketing

2.2 Theoretical foundation of the study

The main pillars of the study are consumers' perception and its effect on market share. Stemming from consumer behaviour perception is considered as one of the key ingredients towards to understanding the consumer buying behaviour. The buying behaviour of the consumers has a significant effect on market share (Noel, 2009).

Aaker (1991) refers to perceived quality as "the customer's perception of the overall quality or superiority of the product or service with respect to its intended purpose, relative to alternatives." This means, the perceived quality is different from actual or objective quality, product-based quality, and manufacturing quality (Aaker, 1991).

Understanding of the factors affecting perceived product quality is essential for all marketing practitioners to design marketing strategies efficiently. Two types of factors are generally discussed among marketing academics. These are intrinsic cues and extrinsic cues. The intrinsic cue concerns physical characteristics of the product itself, such as color, size, aroma, or flavor. Some consumers use these physical characteristics to judge product quality (Schiffman & Kanuk, 2000). According to Bhuian (1998) intrinsic marketing cues refer to attributes that cannot be changed or manipulated without

also changing the physical characteristics of the product itself. Studies show that the perceived product quality varies with the variations in the nature of consumer perceptions of intrinsic marketing cues associated with those products (Schiffman & Kanuk, 2000). However, when it comes to making decisions consumers cannot only rely on intrinsic cues thus, they often evaluate quality on the basis of extrinsic cues that are external to the product itself, such as price, brand image, manufacturer's image, retail store image, or even the country of origin. The perceived product quality has various dimensions such as performance, features, conformance, reliability, durability, serviceability, and "fit and finish" (Schiffman & Kanuk, 2000).

2.3 Industrial Marketing Dynamics

Business to business marketing, Business marketing, Commercial marketing, Institutional marketing and Organizational marketing are some of the names used to refer to Industrial marketing (Cherunilam, 2008). The theory of Industrial marketing began in the early 1930s focusing on topics such as the marketing mix, pricing and advertising based on marketing management theory (Hamjad & Peter, 2013).

Growing importance of high-technology products for business and global competition has propelled the need for increased business to business study. On one hand Bingham Jnr. (1998) describes Industrial marketing as those activities that facilitate exchanges involving products and consumers in the business markets. Gross et al (1998) on the other hand defines business marketing "the marketing of services and products to organizations rather than to households or ultimate consumers. The purchase is made not for self-gratification, but rather to achieve organizational objectives". Therefore

Industrial marketing include the following: Marketing of industrial goods and consumer goods to organizations for in-house consumption; organizations for charitable distribution; organizations for in house consumption and marketing middlemen. To summarize Industrial markets as markets for products and services, both local and international, purchased by government bodies, businesses, parastatals, non-governmental institutions (such as Unicef) for incorporation (components or material ingredients), for use (capital equipment or installation), for resale, for consumption (process material, safety gear and supplies) (Reeder et al, 1991).

Industrial products are defined as goods used for business purposes and consumer products for organizational consumption or which are in the distribution channel with middlemen involved. They include: goods used in the processing or production of other goods example capital equipment, raw materials, intermediaries and supplies, consumer goods which are in the supply chain involving marketing channel middlemen and consumer goods purchased for organizational consumption (Cherunilam, 2008).

The main distinctions between consumer goods and industrial goods are:

Market characteristics, Demand characteristics, Product characteristics and Consumer characteristics. Some demand and product characteristics for industrial products are peculiar to the business market. Many industrial products are of high costs and very complicated in nature. Products have strict technical specifications. They can either be custom made or standard products. Consumer characteristics entail the following: number of consumers, frequency and order size, Contractual penalties, decision making, buying

motives, perception among others. Market characteristics will involve the marketing mix, market structure and market size.

2.4 Industrial Consumers' perception.

An industrial consumer is a user of industrial products. Perception is defined as a process by which information is received, organized and interpreted by an individual (Kotler, 2005). Perception is the way in “which information acquired from the environment via the sense organs is transformed into experiences of objects, events, sounds, tastes and touch ” (Roth, 1986, p.81).

According to Blackett (2003) Brand represents a promise of outstanding benefits to a set of target consumers. Brand Equity therefore, is the perception that a brand would deliver its promise of benefits. This shows that brand equity lives in the hearts and minds of consumers, it's an intra-individual concept. A person can hold a high amount of brand equity for a brand on specific occasions, however, not on other occasions, as the brand's ability to deliver on its promise can be perceived to change on different occasions. This goes on to show that brand equity is context specific (Randy & Leone, 2007). Brand equity can have the following likely outcomes: brand loyalty, positive brand image, brand choice, higher perceived quality, brand-name awareness, higher willingness to pay a price premium, less vulnerability to competitive tactic among others (Keller, 2008), these effects can be seen in channel partners, potential employees, agencies and institutions, consumers and so on (Raggio and Leone, 2007).

2.5 Factors influencing industrial consumers' perception on a brand

Some critical factors influencing industrial consumers' brand perception include among others the convenience, perceived quality, performance, reliability, serviceability, conformance and durability. Convenience: Lin and Chang (2003) argue that brand convenience significantly affects industrial consumers' perception. The ease to which a customer can access a brand will determine how the brand is viewed.

Advertising: This being a powerful form of communication aims at creating brand awareness. Forms of communicating to the industrial consumers' fall in two broad categories, electronic and print. Examples include magazines, television, bill boards, websites, newspapers and posters. The tendency of a brand being strong highly depends on regular advertising, promotion and packaging over a period of time (Aaker, 1991).

Perceived quality: This is a critical factor influencing the choice of a brand by an industrial consumer. Perceived product quality is defined as the consumer's perception of overall components of the product - both the tangible and intangible characteristics. It is so different from actual quality that it can powerfully affect the profit margins, brand power and market share, brand equity, perceived value, returns on investment (ROI) and profitability (Keller, 2008).

Price: This affects brand in two ways; High price selection due to quality, or low price preference to avoid financial risk (Mc Donald and Sharp, 2000). The brand positioning also dictates what pricing levels entailed. Consumers tend to perceive high priced items to have higher quality than relatively low priced products.

Influence by others: according to Kotler et al (1999), the consumer decision process is impacted by others opinion. A lot of consultations regarding a new brand take place before a final decision is made by the industrial consumers'. Advice from other people strongly affects consumer buying behaviour. Referrals in this case is a very strong tool and it depends on the intrinsic or extrinsic cues (Schiffman & Kanuk, 2000). However, depending on the situation or organization the degree of the effects varies. Later adopters tend to be more influenced than early adopters.

Consumers can also be influenced culturally through value, behaviour and preferences form family or institution or religion. For example a social group strong promotion of a brand and what it stands for (Kotler et al, 1999).

2.6 Market share.

Market share is the percentage of a market defined in terms of either units or revenue accounted for by a specific entity organization.

$$\text{Unit market share} = \frac{\text{Unit sales}}{\text{Total Market Unit Sales}}, \text{ Revenue market share} = \frac{\text{Sales Revenue}}{\text{Total Market Revenue}}$$

Farris et al (2010, p33) argues that:

Market share is an indicator of how well a firm is doing against its competitors. This metric, supplemented by changes in sales revenue, helps managers evaluate both primary and selective demand in their market. That is, it enables them to judge not only total market growth or decline but also trends in customers' selections among competitors. Generally, sales growth resulting from primary demand (total market growth) is less costly and more profitable than that achieved by capturing share from competitors.

The concept of market share may be defined by;

$$s_i = Q_i / Q \dots\dots\dots 2.3.1$$

Where S_i = market share

Q_i = the sales (quantity sold or shilling value) of the firms i 's products.

Q = The Total sales (quantity sold or shilling value) for market.

$$Q = \sum_{j=1}^m Q_j$$

m = the number of competing firms.

The quantity Q commonly referred to as industry sales (Cooper & Nakanishi, 2010).

Market definition is not a petty issue because if a firm defines its market too broadly, it may dilute its focus whereas if it does so too narrowly, it will miss opportunities and allow threats to emerge unseen. To avoid this pitfall the served markets should be defined as unit sales.

With increasing competition from both local and international brands business firms are being more and more keen the market share figures they achieve in the market place. Having a bigger market share gives the power to lock out completion through different strategies.

Measures of market share can be used both as an indicator of competitive performance or as an indicator of competitive advantage. In the first instance, market shares should, as

much as possible, be calculated over finer divisions, i.e. by segment, by distribution network or by region. In the second instance, a more amassed basis would be more suitable because it would better reveal the strength of the market power held by the firm and the possible existence of economies of scale or of learning curve effects (Lambin, 2007).

Relative market indexes the firms' market share against that of its leading competitor.

$$\text{Relative market share (I)} = \frac{\text{Brands market share}}{\text{Largest competitors market share}}$$

Market concentration, a related metric, measures the degree to which a comparatively small number of firms account for a large proportion of the market. These metrics are useful in comparing a firm's or a brand's relative position across different markets and in evaluating the type and degree of competition in those markets.

A firm with a market share of 35% would be a powerful leader in many markets but a distant "number two" in others. Relative market share offers a way to benchmark a firm's or a brand's share against that of its largest competitor, enabling managers to compare relative market positions across different product markets. Relative market share gains some of its significance from studies—although controversial ones—suggesting that major players in a market tend to be more profitable than their competitors. This metric was further popularized by the Boston Consulting Group in its famous matrix of relative share and market growth

In the BCG matrix, one axis represents relative market share—a surrogate for competitive strength. The other represents market growth—a surrogate for potential.

Along each dimension, products are classified as high or low, placing them in one of four quadrants. In the traditional interpretation of this matrix, products with high relative market shares in growing markets are deemed stars, suggesting that they should be supported with vigorous investment. The cash for that investment may be generated by cash cows, products with high relative shares in low-growth markets. Problem child products may have potential for future growth but hold weak competitive positions. Finally, dogs have neither strong competitive position nor growth potential (Kotler, 2006).

2.7 Relationship between Industrial consumers' perception and market share.

According to Aaker (1991), Perception is very significant and cannot be ignored. Perceived quality will directly influence purchase decisions and brand loyalty, especially when a buyer is not motivated or able to conduct a detailed analysis. This in turn will affect the market share of a brand. Lastly, brand extensions can be introduced to exploit perceived quality which increases the market share through using the brand name to enter new product categories.

A strong brand with respect to perceived quality will be able to extend further, and will find a higher success probability than a weaker brand (Aaker, 1991).

CHAPTER THREE: RESEARCH METHODOLOGY

3.1 Introduction

This chapter covers the research methodology that was used for this study. It focuses on the research design, population of the study, sample size, data collection and data analysis techniques.

3.2 Research design

The study employed a descriptive survey research design. Ogulla (2005) points out that this type of design involves data collection from a given population by use of questionnaires. Mugenda and Mugenda (1999) notes that survey research attempts to collect data from members of the population and describes existing phenomena by asking individuals about their perception, attitude, behaviour or values.

3.3 Population of the study

The target population comprised of manufacturing organisation within Nairobi county using Atlas Copco industrial compressors. There were two hundred and sixty four companies using Atlas Copco compressors according to company records. The list is attached as appendix 3.

3.4 Sample size

The researcher used a sample size of one hundred manufacturing companies. Cooper and Schindler (2003) advocate for a random sampling process in which a researcher randomly selects the lists from the population of the study. The researcher used systematic random

sampling. Systematic random sampling is where a sample is chosen by selecting a random starting point and then picking each i^{th} number in succession from the sampling frame. The sampling interval i , is determined by dividing the population size N by the sample size n and rounding to the nearest integer. With the population size of two hundred and sixty four organizations and a sample size of a hundred organizations required the sampling interval i , was three.

3.5 Data Collection

The researcher used semi structured questionnaires to collect primary data. The questionnaire was divided into three parts. The first part had questions on the profile as well as general information of the respondent organisation. The second part contained questions on industrial consumers' perception of Atlas Copco compressor brand; the last part focused on market share. The questionnaires comprised multiple choice, Likert type and open ended questions.

Mugenda and Mugenda, (1999) argue that for a research instrument to be reliable, it must be capable of yielding consistent results when used more than once to collect data from two samples drawn randomly from the same population. The researcher carried out a pilot test of the instruments to establish the reliability. The instruments used for the pilot phase were adjusted accordingly to reflect the issues raised during pre-testing.

The researcher made all the necessary arrangements before the commencement of data collection. The researcher obtained an official introduction letter from the University of Nairobi and clarified to the respondents the purpose of study. Upon receiving clearance the researcher then administered the questionnaires through face to face and via email.

3.6 Data Analysis

After administration and collection of completed questionnaires, the researcher edited the questionnaires for completeness and then entered the data in the Statistical Package for Social Sciences (SPSS). Qualitative data were analysed using content analysis techniques, while quantitative data were analysed using descriptive techniques like frequencies distribution, percentages, means, modes, medians and standard deviations. In addition correlation analysis was done to establish the relationships that existed between industrial consumers' perception and market share of Atlas Copco compressors. Finally the data was presented using frequency tables.

CHAPTER FOUR: DATA ANALYSIS, FINDINGS AND INTERPRETATIONS

4.1 Introduction

The findings are organized in three parts. The first part gives the sample general characteristics for example job title or position and knowledge on the industrial compressors. The second part of the analysis gives findings of the perception of industrial compressor brand on customer on intentions of Atlas Copco and thereby answering the first objective of the research study. The final part of the findings and analysis covers the market share of the Atlas Copco Industrial compressors and how it relates to perception. This part answers the second objective of determining the relationship between industrial consumers' perception and market share of Atlas Copco compressor brand.

4.2 Response Rate

A total of 76% respondents sampled from fifty different types of manufacturing companies participated in the survey while 24% did not respond.

4.3 General information of the Respondents.

Respondents from various departments participated in the survey with the majority of them from the maintenance department at 50%, production department at 34% and procurement department 16%. Table 4.1 provides the sample composition of the response rate.

Table 4.1: Functional Responsibility

Functional Responsibility	Frequency	Percentage
Marketing Department	0	0%
Maintenance Department	38	50%
Production Department	12	16%
Procurement Department	26	34%
Total	76	100%

4.4 Type of compressors used by the companies

66.6% of the respondents were already using the Atlas Copco industrial compressors having either been involved in the purchasing of the compressor or in creating the requisition form. 16.7% of the respondents had other competitor’s industrial compressors in their companies. Finally the remaining 16.7% had no idea which compressors they had but only knew that it was a key part of their production process.

4.5 Reasons for using Atlas Copco Eastern Africa Co Ltd’s Products/Services

Respondents were asked to indicate why they use Atlas Copco Industrial Compressors. The intention of the question was to find out exactly what the respondents valued when it came to actually using the industrial compressor. The reasons were divided to capture quality, reliability and serviceability. The responses are as presented in Table 4.2.

Table 4.2: Reasons for using Atlas Copco’s products and services

Reasons for using Atlas Copco’s products and services	Frequency	Percentage
Superior service support and easily available spare	25	33.33%
High quality of compressors with superior energy efficiency	13	16.67%
Global network coverage with vast expertise.	0	0%
High reliability of the compressor with continuous innovations.	25	33.33%
Professionalism of the staff and good relationship developed	13	16.67%
Low cost of ownership considering the reliability	0	0%
They value safety, health and environment	0	0%
Total	76	100%

According to the findings 33.33% of the respondents were influenced more by the superior service support and availability of service parts and High reliability of the compressor with continuous innovations. 16.67% were influenced by High quality of compressors with superior energy efficiency and the professionalism of the staff and good relationship developed over a period of time. The other reasons did not contribute any influence. This shows that the respondents value reliability and quality of the compressors as opposed to the low cost of energy as a long term measure.

4.6 Effect of attributes of Atlas Copco industrial compressor brand to perception.

The survey further sought to find out the effects the attributes contributed to the consumers’ perception of the of the atlas Copco brand. The main industrial compressor attributes were noted and are shown in the Table 4.3.

Table 4.2: Attributes Analysis of Atlas copco industrial compressors.

Attributes	No Effect	Very low	Low Effect	Large Effect	Very Large	Total	Average Rating
Quality of the Industrial	14.29% 10	0% 0	0% 0	42.86% 33	42.86% 33	76	4.00
Compactness of the Industrial	14.29% 10	0% 0	28.57% 22	28.57% 22	28.57% 22	76	3.57
Small footprint	0% 0	0% 0	42.86% 32	28.57% 22	28.57% 22	76	3.86
Easy installation	33.33% 22	0% 0	16.67% 11	16.67% 11	33.33% 22	66	3.17
Robustness	14.29% 11	0% 0	0% 0	14.29% 11	71.43% 54	76	4.29
Return of investment less	14.29% 11	0% 0	0% 0	14.29% 11	71.43% 54	76	4.29
Low noise levels (up to 67 dB)	0% 0	14.29% 11	28.57% 22	42.86% 32	14.29% 11	76	3.57
Protection from high voltage and	0% 0	0% 0	28.57% 22	42.86% 32	28.57% 22	76	4.00
Higher volume flow rate.	0% 0	0% 0	0% 0	100% 11	0% 0	11	4.00

The Table 4.3 shows the weighted average of the attributes effect on perception. It was noted that consumers' perception weighed more on the robustness of the compressor with a mean score of 4.29 and a good return on investment with a mean score of 4.29. Quality of the industrial compressor, protection from overload of voltage and current and the capacity of the free air delivered in comparison to other compressors came in second place with a mean score of 4.0. Easy installation of the compressor had the lowest mean score of 3.17. These results show that consumers' perception is more on attributes that are associated with reliability of the compressor in the long run. At the same time emphasis on return on investment is also important. The issues to do with installation and design of the compressors as attributes is not very key according to the survey.

4.7 Customer Value indicators effect on perception.

Using the customer value indicators such as peace of mind, product quality, air quality and energy efficiency. The researcher sought to determine which was most valuable to the respondents. The data is presented in the Table 4.4 on the analysis of the value indicators with a cumulated grade average maximum weight of five. Each value indicator analyzed separately.

Table 3.4 : Analysis of the customer value indicators effect.

Value Indicators	No Effect	Very low Effect	Low Effect	Large Effect	Very Large	Total	Average Rating
Value for Money	20% 11	0% 0	0% 0	20% 11	60% 33	55	4.00
Improved production	16% 12	0% 0	0% 0	42% 32	42% 32	76	4.00
Product quality	0% 0	0% 0	14.29% 11	57.14% 43	28.57% 22	76	4.14
Peace of mind	14.29% 11	0% 0	0% 0	14.29% 11	71.43% 54	76	4.29
Aftermarket support	14.29% 11	0% 0	0% 0	14.29% 11	71.43% 54	76	4.29
Lower Plant Maintenance	14.29% 11	0% 0	0% 0	14.29% 11	71.43% 54	76	4.29
Improved air quality	0% 0	14.29% 11	14.29% 11	28.57% 22	42.86% 32		4.14
Lower production costs	14.29% 11	0% 0	0% 0	28.57% 22	57.14% 43		4.00
Energy efficiency	16.67% 13	0% 0	0% 0	33.33% 25	50% 38	76	4.00

In the Table 4.4 it shows more about the indicators and how the respondents thought they affected their perception about the industrial compressor brand. The findings from the survey collected showed that lower cost of maintenance, peace of mind and aftermarket support having an average rating of 4.29. Air quality and product quality scored 4.14 with the remaining indicators scoring an average rating of 4.00.

Based on the survey results, the most important indicators were having a peace of mind, aftermarket support and lower maintenance costs. This shows that respondents are more interested in having an industrial machine that is easy to maintain at a low cost so as not to have any downtime during normal operations.

4.8. Association to value indicators of Atlas Copco industrial compressors.

The researcher then went ahead to find out to what indicators were mostly associated with the Atlas Copco Industrial compressors. Table 5 shows the associations the respondents have toward the compressor.

Table 4.4: Percentage representation for the association indicators.

Association to value indicators of Atlas Copco	Frequency	Percentage
Improved Production Reliability	0	0%
Product Quality	25	33.33%
Peace of Mind	13	16.67%
Aftermarket support	25	33.33%
Lower Plant maintenance costs	13	16.67%

Association to value indicators of Atlas Copco	Frequency	Percentage
Improved Air Quality	0	0%
Lower Production costs	0	0%
Energy efficiency	0	0%
Total	76	100%

33.3% of the respondents identified product quality and the aftermarket support as the value indicators associated with the Atlas Copco industrial compressor. 16.7% of the respondents settled for Lower plant maintenance cost and peace of mind.

Based on the survey results the Atlas Copco industrial compressor brand is mostly associated with Aftermarket support and quality at 33.33%, the peace of mind and lower plant maintenance costs at 16.67%.

This was in line with Lin and Chang (2003) argument that brand convenience significantly affects industrial consumers' perception and that the ease to which a customer can access a brand will determine how the brand is viewed. The improved production reliability, air quality, low cost production costs and energy efficiency did not have significance.

4.9 Market share

The market share was based on the sample size and not the whole industry. Out of the 76 respondents 57 had only Atlas copco industrial compressors working, while 10 had industrial compressors from Atlas copco and competition compressors, 9 respondents did

not know what type of compressors they had. The total count of industrial compressors in the survey was ninety five. The total market share was $(61/95*100\%)= 64\%$.

4.10 Consumers recommendation of Atlas Copco Industrial Compressors.

The respondents were asked whether or not they would recommend the industrial compressors to their friends and other prospective buyers.

This question was seeking to find out the relationship between the perception and market share. The net promoters in the survey being the respondents who would recommend favorably on the Atlas copco industrial compressor brand and thereby increasing the market share indirectly while the detractors would also recommend unfavorably thus affecting the market share negatively. The results are as shown on Table 6.

Table 4.5: Recommendations based on consumer perception.

Consumers recommendation of Atlas Copco Industrial	Frequency	Percentage
Definitely No	10	13%
Probably No	0	0%
Probably Yes	11	14%
Definitely Yes	55	72%
Total	76	100%

An overwhelming 72% were ready to recommend the Atlas copco industrial compressors to others, 13% were not ready to recommend the compressors.

From the findings it is clear that with good perception of the Atlas Copco industrial compressors, respondents are able to recommend favourably and thus increase the market share.

4.11 Likelihood of purchasing Atlas Copco industrial compressors.

Finally the respondents were asked on whether they would purchase Atlas Copco industrial compressors. This was question was meant to find out once again the effect of their inborn perception on the industrial compressors towards increasng the market share of the compressors. The net promoters in the survey being the respondents who would extremely likely to purchase the Atlas copco industrial compressor brand and thereby increasing the market share directly while the detractors would not at all be likely to purchase thus, affecting the market share negatively. Table 7 shows the results as per the survey.

Table 4.6: Frequency of repurchasing an industrial compressor.

Purchasing Atlas Copco industrial compressor	Frequency	Percentage
Extremely Likely	13	17%
Very Likely	50	66%
Moderately Likely	0	0%
Slightly Likely	0	0%
Not at all Likely	13	17%
Total	76	100%

From the survey results it was noted that 66.67% of the respondents were very likely to purchase the Atlas Copco industrial compressor once again. 16.67 were not at all likely to repurchase the compressors. This indicates that with very favorable perception respondents very likely to purchase and increase market share of the Atlas Copco industrial compressors.

CHAPTER FIVE: SUMMARY, CONCLUSIONS AND RECOMMENDATIONS

5.1 Introduction

This chapter is divided into four parts. The first part is the summary that ties the research findings to the research objectives and existing bodies of knowledge. The second one is the conclusion which comprises a discussion of the findings and analysis. The third one highlights the limitations of the research as well as limitations of the findings. The final part gives recommendations for further research.

5.2 Summary

This research study was conducted in order to answer some fundamental questions based on the consumer's perception towards Atlas Copco industrial compressors and market share. The study had two objectives; the first was to establish the Industrial consumer's perception of Atlas Copco compressor brand. The second objective was to determine the relationship between industrial consumers' perception and market share of Atlas Copco compressor brand.

Respondents were asked on what attributes of the Atlas Copco industrial compressor influenced their perception towards the brand and according to the survey results a number of the respondents considered robustness of the compressors and high return on investment through energy efficiencies as the most influential attributes. On the same level to test reliability respondents were asked on customer value indicators and influence

on the perception of the brand. The main indicators included the following: Peace of mind, after market support and lower plant maintenance cost.

Finally the respondents were asked on what they perceived Atlas Copco industrial compressor mostly associated with. The results of the survey indicated the product quality and aftermarket support each were key in the consumers' perception.

The second part of the survey was to find out the actual market share of the atlas Copco industrial compressors from the sample. The majority of the respondents from the survey were using Atlas Copco industrial compressor brand.

The final part sought to find out the relationship between the perception of the Atlas Copco compressor brand and the market share. Through two main questions majority of the respondents overwhelmingly gave positive feedback on recommendation of the Atlas Copco Industrial compressors to friends and would most likely purchase the industrial compressors again.

Given the results from the survey it can be stated that there is an existing strong relationship between the consumers' perception on a brand towards the market share. This will be seen especially in the favorable response when it comes to recommendation.

5.3 Conclusion

The research study based on the above survey result was able to achieve the two objectives to establish the Industrial consumer's perception of Atlas Copco compressor brand and determine the market share of Atlas Copco compressor brand. Based on the research findings majority of the respondents would increase the market share by

purchasing the industrial compressors. The research was able to determine the main attributes that consumers' perceived to be most important such as robustness of the industrial compressor, good aftermarket support structures and low cost of maintenance.

According to Hoyer and brown (1990) as cited by Lin and Chang (2003), they found out that brand awareness was the primary factor in decision making process in their study that examined the importance of brand awareness. In a different study Jiang (2004) found out that brand recognition affected the choice of consumer's.

In this study, brand awareness has a strong influence on consumer's perception of Atlas Copco industrial compressors and market share.

5.4. Recommendations for practitioners and theory of study

The research study established a strong relationship between the consumers' perception and market share. The general findings of the study confirm most of the assumptions that market share is influenced by the consumers' perception.

Therefore it's key for practitioners to consider the consumers' perception when developing strategies for market penetration.

The development of the theory of study especially on the industrial consumers' motives on their perceptions should be studied further and findings will help understand the industrial consumers'.

5.5 Limitations of the study.

The research study was constrained by time and funds availability which resulted in limiting the respondents to those in Nairobi rather than the greater Eastern Africa region in which Atlas Copco Eastern Africa Limited covers. The characteristics of the customers in the other countries within East Africa may differ from those in Kenya. As a result of such differences, the findings may not be generalized. It is however, worth noting that sample is a true representation of the entire population as it comprises customers using the full range of products and services offered by Atlas Copco Eastern Africa Limited.

5.6 Recommendations for Future Research

The research study has explored the consumers' perception of Atlas Copco Industrial compressors brand and market share. Similar studies can be replicated and use a large sample encompassing the entire East Africa Region. A similar study can also be conducted on consumers' within specific industries, for instance oil and gas sector, Mining and construction sector, as well as other industries in order to get a broader appreciation of how consumers' brand perception affect market share.

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APPENDICES

APPENDIX 1: COVER LETTER

Geoffrey Misiani

C/O University of Nairobi

School of Business

Nairobi, Kenya

The Director,

Dear Sir(s),

Ref: MBA Research Questionnaire

The above refers. I am a post graduate student at The University of Nairobi undertaking a Masters Degree in Business Administration (MBA). As part of the study work, I am required to carry out a research study on the industrial consumer perception and market share of the Atlas Copco brand. Your esteemed organisation was selected as part of the sampled population.

I kindly request for your permission and time to fill out the attached questionnaire. The data collected remains confidential and will be used for academic purposes only.

Thanking you in advance,

Geoffrey MISIANI

Dr. Mary Kinoti

Signed

Senior Lecturer– School of Business

APPENDIX 2: QUESTIONNAIRE

UNIVERSITY OF NAIROBI

MBA RESEARCH PROJECT QUESTIONNAIRE

SECTION I : BACKGROUND INFORMATION

Please tick or mark a cross the appropriate department where you work.

1. Please indicate your functional responsibility in the company.

Marketing Dept () Maintenance Dept () Finance Dept () Production Dept ()

2. What industrial compressor(s) is provided to you by Atlas Copco Ltd?

a.) Stationary Air compressors (Electric) ()

b.) Portable Air compressor (Diesel) ()

SECTION II: ATLAS COPCO PRODUCTS

3. The main reason I use the product(s) and service(s) of Atlas Copco Eastern Africa Ltd listed in question 5 above is because: (you can tick/cross more than one answer)

a.) Their personnel are highly skilled ()

b.) The quality and price is just right ()

c.) Of their superior service ()

d.) Of their global network coverage ()

e.) Of their reliability ()

- f.) Are customer friendly, highly professional ()
- g.) They value safety, health and environment ()
- h.) Of their financial stability ()
- i.) Of their competence ()
- j.) Any other reason please specify.....

4. The following are various brand strategies. Please tick the ones you can associate with Atlas Copco Eastern Africa Ltd. (you can tick/cross more than one answer)

- a.) Quality both in sales and service ()
- b.) Better benefits and attributes compared to others ()
- c.) Global product class / category ()
- d.) Competitive Price ()
- e.) Competent human resource ()
- f.) Sustainability ()
- g.) Reliability ()

5. In answering this question and rest of the questions in this section, you are given a scale of 1 – 5 to help you respond easily; where:

5 = a very large effect

4 = large effect

3 = low effect

2 = very low effect

1 = no effect

Please indicate the effect of the following variables offered by Atlas Copco Industrial Compressors on your perception towards Atlas Copco Brand?

Variables	5	4	3	2	1
a.) Quality of the Industrial compressors	()	()	()	()	()
b.) Compactness of the industrial compressor having an in built integrated dryer.	()	()	()	()	()
c.) Having a small Footprint	()	()	()	()	()
d.) Easy installation of the compressor	()	()	()	()	()
e.) Easy accessibility during servicing of various parts of the compressors. Ergonomics	()	()	()	()	()
f.) High Energy efficiency that reduces energy costs.	()	()	()	()	()
g.) Very low noise level up to 67dBA	()	()	()	()	()
h.) Protection from overload of voltage and current- phase	()	()	()	()	()

sequence relay.					
i.) Low pressure drop on the line.	()	()	()	()	()
j.) More Free Air delivered by the compressor.	()	()	()	()	()
k.) Availability of Variable speed drive Motors on the industrial compressors.	()	()	()	()	()

6. What is the effect of the following quality indicators of Atlas Copco Eastern Africa Ltd to your perception towards Atlas Copco industrial compressor brand?

Quality Indicators	5	4	3	2	1
a.) Responsiveness to customers	()	()	()	()	()
b.) Competent workers	()	()	()	()	()
c.) Using efficient processes	()	()	()	()	()
d.) Quality assurance to customers	()	()	()	()	()
e.) Provider of variety of services to clients	()	()	()	()	()
f.) Privacy and confidentiality of client information	()	()	()	()	()

g.) Reliability from credible workers	()	()	()	()	()
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SECTION III: MARKET SHARE

7. How many industrial compressors do you have in the organisation?

.....

8. How many of these compressors are of Atlas Copco Brand name?

.....

.....

Thank you so much for your cooperation in answering the questionnaire.

Geoffrey MISIANI

APPENDIX 3: LIST OF CUSTOMERS

1	ELYS CHEMICAL INDUSTRIES LTD	133	SILPACK INDUSTRIES LTD
2	KENYA MARBLE QUARRIES LTD	134	MARRYAT & SCOTT LTD
3	AMALGAMATED PROPERTIES	135	H YOUNG & CO EA LTD
4	WARREN CONCRETE LIMITED	136	SPECTRE EA LTD
5	BAMBURI CEMENT LTD - ATHI RIVE	137	POLYTHENE INDUSTRIES LTD
6	KENYA MEAT COMMISION	138	DAWA LTD
7	RAIPLY LTD	139	BEIERSDORF EAST AFRICA LTD
8	SUMARIA INDUSTRIES	140	ELITE EARTHMOVERS LTD
9	SUPRA TEXTILES LTD	141	KARI VACCINES
10	SWITCHGEAR & CONTROLS LTD	142	MARSHALL FOWLER ENGINEERS LTD
11	CARTON MANUFACTURERS LTD	143	COSMOS LTD
12	DAWA LTD	144	GLAXOSMITHKLINE KENYA LTD
13	EAST AFRICAN PACKAGING IND. LT	145	PZ CUSSONS EA LTD
14	FRIENDSHIP CONTAINER MANUF. LT	146	CENTRAL GLASS INDUSTRIES LTD
15	GENERAL PLASTICS LTD	147	POWER MEGGER LTD
16	GILOIL COMPANY LIMITED	148	OILIBYA
17	HOMEGROWN (K) LTD	149	KENYA WINE AGENCIES LTD
18	INSTEEL LIMITED	150	NAMPAK KENYA
19	MADHUPAPER KENYA LIMITED	151	THE PAPERHOUSE OF KENYA LTD
20	MANSON HART KENYA LIMITED	152	THE WRIGLEY COMPANY EAST AFRICA
21	MULTIPLE HAULIERS (E.A) LTD	153	POWER TECHNICS LTD
22	MINI BAKERIES LTD (50 FACTORIES IN KENYA)	154	PREMIER FOOD INDUSTRIES LTD
23	WE TILLEY (MUTHAIGA) LTD	155	PRIMAROSA FLOWERS LIMITED

24	KOMATSU PANAFRICAN LTD	156	PRINSAL ENTERPIRSES LTD
25	POLYPIPES LTD	157	PRINTPAK
26	BANTARAM TENTS LTD	158	PROTEX KENYA EPZ LTD
27	NAIROBI BOTTLERS LTD	159	PZ CUSSONS EAST AFRICA LIMITED
28	NAS PLASTICS LIMITED	160	R.T. EAST AFRICA LTD
29	NUTRO MANUFACTURING EPZ LTD	161	RAFIKI MILLERS LTD
30	ORBIT CHEMICAL INDUSTRIES LTD	162	RAMCO PRINTING WORKS LTD
31	OZZBECO KENYA LTD	163	ROLEX GARMENTS EPZ
32	PAPER CONVERTERS (K) LTD	164	SADOLIN PAINTS (E.A) LTD
33	PARBAT SIYANI CONSTRUCTION LTD	165	SAFEPAK LIMITED
34	RELIANCE KENYA LTD	166	SAMEER AFRICA LIMITED
35	SAJ CERAMIC LTD	167	SANPAC AFRICA LIMITED
36	SUNFLAG TEXTILE & KNITWEAR LTD	168	SARA LEE HSEHOLD & BODYCARE K
37	TETRA PAK CONVERTERS LTD	169	SIGNODE PACKAGING SYSTEMS LTD
38	LONGSPAN ENGINEERING - KAREN	170	WIRE PRODUCTS LIMITED
39	CHODA FABRICATORS LTD	171	WOOD PRODUCTS (KENYA) LTD
40	TREADSETTERS TYRES LTD	172	MINI DAIRIES LTD
41	TRU-FOODS LTD	173	MIRAGE FASHIONWEAR (EPZ) LTD
42	UNGA LIMITED	174	PEMBE FLOUR MILLS LTD
43	ZEP COMPANY LTD	175	SIMLAW SEEDS CO. LTD
44	WOODTEX KENYA LTD	176	TETRA PAK LTD
45	ACME CONTAINERS LTD	177	TREDCOR KENYA LTD
46	ALLPACK INDUSTRIES LTD	178	SUPERSLEEK LTD
47	ALLTEX EPZ LTD	179	HORIZON LTD

48	ALPHA KNITS LTD	180	VAJA'S MANUFACTURERS LTD
49	ALPHARAMA LTD	181	SOLITON TELMEC
50	ARISTOCRATS CONCRETE LTD	182	LONDON DISTILLERS KENYA LTD
51	ASHUT ENGINEERS LTD	183	GENERAL MOTORS EA LTD
52	ASSOCIATED BATTERY MAN.(E.A) L	184	GENERAL PRINTERS LTD
53	ASSOCIATED STEEL LTD	185	PACKAGING MASTERS LTD
54	AUTOSTERILE (EA) LIMITED	186	MANSON HART KENYA
55	BANBROS LTD	187	ACHELIS MATERIAL HANDLING LTD
56	BEIERSDDRF EAST AFRICA LTD (BD	188	ELECTRIC LINK LTD
57	BEVERAGE SERVICES KENYA LTD	189	EAST AFRICA FOUNDRY WORKS LTD
58	BLOWPLAST LIMITED	190	KAY CONSTRUCTIONS CO. LTD
59	BLUE NILE WIRE PRODUCTS LTD	191	FUNAN CONSTRUCTION LTD
60	BOBMIL INDUSTRIES LTD	192	GEOHERMAL DEVELOPMENT CO. LTD
61	BOC KENYA LIMITED	193	SADOLIN PAINTS EA LTD
62	BOOTH EXTRUSIONS LTD	194	ACTION AID INTERNATIONAL KENYA
63	BASH HAULIERS LTD	195	KEVIAN KENYA LTD - DAGORETTI
64	DISTELL - WINEMASTERS	196	DILPACK KENYA LTD
65	Brookside Dairy Ltd	197	ROTO MOULDERS LTD
66	BULLPAK LIMITED	198	NAIROBI ENTERPRISES LTD
67	CADBURY KENYA LIMITED	199	DABASIA BUILDERS LTD
68	CAPWELL INDUSTRIES LTD	200	NATIONAL CONCRETE CO. LTD
69	CARBACID (CO2) LIMITED	201	PROCTOR & GAMBLE EA LTD
70	CENTRAL GLASS INDUSTRIES	202	PENELLY CONSTRUCTION LTD
71	CHANDARIA INDUSTRIES LTD	203	RT EAST AFRICA LTD

72	CHILDREN OF GOD RELIEF INST.	204	PALMAC OIL REFINERIES LTD
73	CHINA CENTER LTD	205	EVEREADY EAST AFRICA LTD
74	COMPLY INDUSTRIES LTD	206	M.R.C NAIROBI EPZ LTD
75	COSMOS LIMITED	207	SIGNODE PACKAGING SYSTEMS LTD
76	KARMYN SOCK INDUSTRIES LTD	208	CROWN FOODS LTD
77	DE LA RUE CURRENCY	209	TECHPACK INDUSTRIES LTD
78	DEL MONTE KENYA LTD	210	FINELINE INDUSTRIES LTD
79	DODHIA PACKAGING LTD	211	URBAN FLAMES KENYA LTD
80	E. A. FOUNDRY WORKS (K) LTD	212	EDEN LTD
81	EAST AFRICAN CABLES LTD	213	VALUE PACK FOOD KENYA LTD
82	EAST AFRICAN MALTINGS LTD	214	ALPHA GRAIN MILLERS LTD
83	EAST AFRICAN PORTLAND CEMENT L	215	VOLCANIC PLUMBING WORKS LTD
84	ELLAMS PRODUCTS LTD	216	LAKE BASIN DEVELOPMENT CO LTD
85	ENTREPISE GENERALE MALTA FORRE	217	DELUXE INKS LTD
86	EPCO BUILDERS LTD	218	ROYAL DANISH EMBASSY - NAIROBI
87	ESLON PLASTICS OF KENYA LTD	219	MJENGO LTD
88	EVEREADY BATTERIES KENYA LTD	220	SUPREME BALASTS LTD
89	FINE SPINNERS LTD	221	ABM EAST AFRICA LYTD
90	FRIG-O-KEN LTD	222	NEW KCC - NAIROBI
91	GENERAL INDUSTRIES LIMITED	223	CB RICHARD ELLIS LTD
92	GENERAL MOTORS KENYA LTD	224	SAGOO HOLDINGS LTD
93	H.YOUNG & CO.(E.A.) LTD	225	BRITISH AMERICAN TOBACCO - NRB
94	HALAR INDUSTRIES LIMITED	226	PLASTIC ELECTRICONS LTD
95	HEAVY ENGINEERING LTD	227	PLYSALES KENYA LTD

96	HEKIMA COLLEGE	228	POLY PIPES LIMITED
97	HOME(WEETABIX) LTD	229	POLYTHENE INDUSTRIES LTD
98	IBERAFRICA POWER (E.A) LTD	230	BRIGHTSUN PACKAGING LTD
99	INSTA PRODUCTS (EPZ) LTD	231	PAPER HOUSE OF KENYA
100	INTERCONSUMER PRODUCTS LTD	232	PAPERBAGS LIMITED
101	INTERLABELS AFRICA LTD	233	EA CABLES - ALUMINIUM DIVISION
102	INTERNATIONAL ENERGY TECHNIK L	234	TILLEY GROUP OF COMPANIES
103	JAMBO BISCUITS (K) LTD	235	PETROLEUM & INDUSTRIAL SERVICE
104	JAY CERAMICS LTD	236	PIPE MANUFACTURERS LTD
105	JUSTEL SUPERMARKET LTD	237	NESTLE FOOD KENYA LTD
106	KABUITO CONTRACTORS LTD	238	NEW KENYA COOPERATIVE CREAMERI
107	KAJULU HOLDINGS LIMITED	239	NGECHA INDUSTRIES LIMITED
108	KAY CONSTRUCTION LTD	240	ORBIT ENTERPRISES
109	KENAFRIC INDUSTRIES LIMITED	241	IVEE AQUA (EPZ) LTD
110	KENBLEST LIMITED	242	IVEE INFUSIONS (EPZ) LTD
111	KENGEN CO. LTD	243	ACME CONTAINERS LTD
112	KENWEST CABLES LTD	244	THIKA COTTON MILLS LTD
113	PEMBE FLOUR MILLS	245	SILPACK INDUSTRIES LTD
114	KENYA BREWERIES LTD (NAIROBI)	246	SPINNERS & SPINNERS
115	KENYA BUILDERS & CONCRETE	247	STEEL STRUCTURES LTD
116	KENYA LITHO LIMITED	248	HACO TIGGER BRANDS
117	METRO PLASTICS KENYA LTD	249	KENTAINERS LTD
118	PATEL CONCRETE	250	NAMPACK KENYA LIMITED
119	KENYA WINE AGENCIES LTD	251	NATION MEDIA GROUP LIMITED

120	UNITED STEEL - MOMBASA	252	MOMBASA MAIZE MILLERS (NRB) LTD
121	ATHI RIVER MINING - KALOLENI	253	KENYA GRANGE VEHICLE INDUSTRIES LTD
122	PEARL INDUSTRIES LTD	254	KENYA VEHICLE MANUFACTURERS LTD
123	MAJANI BORA PRODUCTS	255	TRANSFLEET
124	KANGAROO BRANDS LTD	256	WRIGLEY COMPANY (E.A) LTD
125	LANEEB PLASTIC INDUSTRIES LTD	257	KENYA WILDLIFE SERVICES
126	MABATI ROLLING MILLS-RESINCOT	258	WILSONS POWER & TECHNOLOGIES LTD
127	MAGNATE VENTURES LIMITED/STANB	259	NAIROBI PLASTICS LIMITED
128	MAISHA FLOUR MILLS	260	TEBERE CONCRETE CO. LTD
129	MAJANI BORA PRODUCTS	261	THERMOPAK LIMITED
130	MALPLAST INDUSTRIES LIMITED	262	MASTERMIND TOBACCO (K) LTD
131	MANCHESTER OUTFITERS LTD	263	MC FRY'S LTD
132	METAL CROWNS LTD	264	MCNEEL MILLERS LTD