CHALLENGES OF DIGITAL BROADCASTING AND COMPETITIVE STRATEGIES ADOPTED BY TELEVISION STATIONS IN KENYA

BY

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NOVEMBER, 2016
DECLARATION

STUDENT’S DECLARATION

I declare that this research project is my original work and has not been submitted for Examination or Academic purposes in any other University or College.

Signature ........................................ Date .....................................

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SUPERVISORS DECLARATION

I confirm that this project has been submitted for examination with my approval as the university Supervisor.

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I would like to express my deepest appreciation to the following people for their support that made this research paper a success;

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I am sincerely grateful to God for the gift of serenity from the beginning of the studies to the completion. I also appreciate my colleagues at work; class mates especially group members, all lecturers and my family members for their understanding and support. May the Almighty God bless you.
DEDICATION

This research project is dedicated to my husband Michael Mwendwa for his great and unending support. To our sons: Jason Mutemi, Jefferson Muuo and Stanley Syengo for all their patience and understanding. May God keep you and bless you.
ABSTRACT

The media industry has undergone major changes after analogue to digital migration. Digital broadcasting has reduced the entry barrier which has for years been a source of competitive advantage. It has fragmented the audiences and this has posed a great danger to television stations which make revenue solely via advertisements. As a result, competition is cut throat and the television stations had to adopt relevant competitive strategies. The aim of the study was to look at the challenges of digital broadcasting especially its effect on competition and competitive strategies adopted by television stations in Kenya. The study adopted descriptive cross sectional survey design. The target population of study comprised of 8 local television stations owned by the large media organizations in Kenya. Data analysis was done with the help of Statistical Package for Social Sciences (SPSS version 21) and the findings were presented in form of table and figures for easy understanding. The study determined that digital broadcasting brought the challenge of increased competition. Using Porter’s Five forces model, it was determined that it was easy for competitors to enter the television industry and compete effectively, there was a big threat of substitute product, competitive rivalry had increased and it was very easy for buyers and in this case advertisers to drive prices down as well as switch to a competitor. The study established that the local television stations in Kenya used their resources to achieve a competitive advantage. The key resources used are the human resource and financial capability. It was also established that appropriate pricing strategy as well as strategic positioning enabled the television stations to attain a competitive advantage. The recommendations of this study are that disruptive technologies will continue to transform the television industry. Therefore, the televisions have to be proactive in scanning the external environment so as to identify such technologies and take the necessary strategic steps to cushion the firm from adverse effects. Another recommendation is that the television stations will have to expand their revenue stream from pure advertising to set top boxes subscription as well as by moving into the outdoor advertising. Further, profitability can be increased by signing long term contracts with the advertisers accompanied by rewards to enhance customer loyalty. This can increase the switching costs. Television stations should strive for the top positions in terms of the most competitive human resource, cost management and differentiation an aspect perceived to bring forth best performance of the television stations. The key conclusion of this study is that, despite the high competition resulting from digital broadcasting, television stations can still achieve a sustained competitive advantage. The study has two main implications: Firstly, there is need for television stations to do Research and Development and establish how they can take advantage of the disruptive technology and use it as an opportunity rather than a threat. Secondly, it is important to determine other different ways that the television stations can remain competitive apart from use of resources, cost leadership and strategic positioning.
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CHAPTER ONE

INTRODUCTION

1.1 Background of the Study

Radio frequencies are used in the transmission of digital terrestrial broadcast which is through the use of multiplex transmitters. These transmitters, as opposed to the analogue channel, they allow the reception of more than one channel in the similar space. The signals are received through integrating devices such as the digital set-top box, (OECD, 2013). This shows an advancement prior to the digital era whereby the viewers were only restricted to only 3-6 channels whereas now they have a variety of over 100 channels (Heap et al., 2005). Competitive strategy entails the methodology employed by a particular organization so as to gain an upper hand against their rivals (Johnson, et al 2005). Attaining competitive advantage is very crucial in a business as it only enables the company to compete better, but it also ensures maximization of profits. This thus implies that through providing better and more customer oriented services, the television media houses were able to gain competitive advantage (Beer et al., 2012).

This study was supported by three theories, namely: Opportunity-Based Entrepreneurship theory, Resource Based View Theory and the Niche theory which formed the basis of the study. Particularly, Opportunity- Based theory states that entrepreneurs have an eye on opportunities caused by change. The Resource Based View theory holds that the resources a particular company has, highly predetermines the strategies it is able to adopt. According to Dimmick, 2013) industries occupy market niches just as biological species occupy ecological niches.
This study is motivated by the recent drastic changes in the technological advancement. As such, television stations have been affected by these advances, more than any other sector. These technologies are termed as disruptive as they have the potential of transforming the operations of a particular industry (Day & Schoemaker, 2000). This has seen increased advertising as demanded by the advertisers as a means of gaining the attention of the audience. As digital technologies fragment audiences and give them greater control over their viewing experiences, the impact of advertising on content declined (Goodman, 2004). This study seeks to determine the challenges of digital broadcasting and competitive strategies adopted by the television stations and what they did to protect their revenue stream.

**1.1.1 Digital Broadcasting**

Up to the 20\(^{th}\) century, the main broadcasting method was through the transmission of video and sound streams by airwaves means using the analogue signals. This process was slow as only one element could be transmitted at a time and it required a lot of bandwidth in order to carry signals in this manner. The initial UHF and VHF frequencies implied that one station had only one particular frequency (Berger, 2010). A change in the transmission was experienced when digital migration occurred. Digital migration involves analogues services being transmitted into the digital platforms.

The digital migration process began in early 2000. A number of countries from Europe, Africa, Middle East and others introduced the digital broadcasting namely the Very High Frequency (VHF) and Ultra High Frequency (UHF). Though the used the already existing broad bands, they yearned to provide even more effective services using the current scarce frequency source (CCK, 2013).
The television and broadcasting sector has been experiencing both technological and structural changes, which have given consumers access to more media services (OECD, 2013). Particularly, the technological developments affect the conditions of competition as they change the: the operating costs, the barriers to entry levels, flexibility, the mechanisms used in pricing and provision of new services (OECD, 2013). With the entry of new media parties in the sector, the pre-existing ones are threatened. This has seen the rise of range of responses to threats and opportunities with one such new area concentrating on new media consumption.

1.1.2 Competitive Strategies

Strategy is termed as the measures put in place by an organization so as to ensure that competitive advantage is attained (Johnson, et al, 2005). Organizations may use various strategies so as to gain the preference of the customers’ choice. This may be through a number of ways such as providing goods at a convenient cost, providing unique goods, catering for the customer’s specifications and providing better quality products. However, one limitation that occurs is that the competitors may be able to imitate a particular strategy and as such limiting the amount of competitive advantage that could be attained by that particular strategy.

The performance of a strategy may be accessed by its ability achieve its intended purpose without causing extra expenses to the organization. Digitalization has immensely reduced the barriers to entry to accessing information services; it has highly intensified how the media stations compete. As such, more advanced competitive strategies have been introduced by the television stations. Example, the dominance or expansion of public free-to-air broadcasters might increase barriers to
entry for pay TV operators. This necessitates the managements to constantly evaluate their strategies so as to establish whether they are sufficient enough (Pearce & Robinson, 2007). It is very important to evaluate the power that a firm has for it to make wise decisions which can enable it to be ahead of its competitors.

1.1.3. Television Media Stations in Kenya

The media industry in Kenya is diverse, vibrant and is rapidly growing. It is referred to as the fourth estate. Opportunity presents as avenues for improving performance for the organization while a threat carries the potential to inhibit the success of the organization. A good understanding of the two forces is desirable if the organization is to remain relevant and competitive to ensure success in business. An organization identifies opportunities and threats in the environment and builds strategies by matching resources and capabilities to those opportunities and reducing the threats.

Local television media stations in Kenya are owned by various media houses. Government owned Kenya Broadcasting Corporation runs the widest radio and TV network (Mshindi, 2008). The Nation Media Group has outlets in radio, TV, newspapers, magazines and publishing. The Royal Media services controlling Citizen TV, a national TV network and 11 fm stations across the country 9 of which are vernacular radio stations. The Standard group owns the standard newspaper, Kenya Television Network and Radio Maisha (BBC, 2009). Media max on the other hand is part of TV Africa Holdings while Radio Africa group runs Kiss TV.
1.2 The Research Problem

Digital broadcasting has increased competition in the television industry. The advertising industry might respond to the forces that devalue audiences by abandoning television. Secondly it may increase the frequency of commercials to counterbalance the reduction of audience attention (Goodman, 2004). This poses a great danger to the television industry because it lost revenue if it were to happen. Competition caused by digitization is so stiff and necessitates the study on how the local television stations have respondent to the pressure. Kenya has witnessed a growth in demand for information and media companies are seeking to concentrate in areas of core strength. Access to information through the media is critical in transforming political, economic and social systems. With rising competition within the media industry reaching fever pitch, a successful competitive strategy is needed as it helps focus on assessing an organization’s characteristics and their competitiveness. It effectively supports the organization’s top-line growth objective by helping develop a differentiated and sustainable position.

Various studies have been conducted on media and effects that competition has on different segment of media. Some of these researches are: competitive intelligence Practices by FM stations in Kenya, Sang (2011), on advertising agencies in Kenya (Mbuthia, 2003), competitive strategies adopted by mainstream daily print media firms in Kenya (Mbugua, 2006) and Competitive strategies adopted by Nation Media Group Limited (Muganda, 2007). However, there is no study that has been done specifically on challenges brought by digital broadcasting and competitive strategies adopted by television media stations in Kenya. This study sought to bridge this gap
and specifically addressed the following research questions: what are the challenges faced by Television stations in Kenya as a result of digital broadcasting? What competitive strategies have television stations in Kenya adopted to cope with these challenges?

1.3 Research Objective.

The objective of the study was to determine the challenges of digital broadcasting and competitive strategies adopted by television stations in Kenya.

1.4 Value of the Study

The study provided insights to the policy makers. This is important in formulation of relevant policies that will enable the sector to thrive even more. For instance, policy makers can put in place proper policies to limit entry into the market.

The results obtained are useful to the television stations management. This is helpful in re-evaluation of the already existing strategies, and formulation of new ones. This will lead to competitive advantage in a highly turbulent industry.

In addition, the study has contributed to the already present knowledge in the area of digital broadcasting and strategy in broadcast stations in Kenya. Therefore, this may form basis for future study. This will prove useful for scholars who would wish to study on the challenges of digital broadcasting and competitive strategies.
CHAPTER TWO
LITERATURE REVIEW

2.0: Introduction

The review of the literature entails a systematic identification, location and analysis of documents which have information related to the research problem under investigation. The sources of literature review can be primary or secondary. It reveals the strategies, procedures and measuring instruments useful in the study. This chapter deals with the Literature Review and theoretical orientation.

2.1: Theoretical Review

Opportunity-Based Entrepreneurship theory, Resource Based View and the niche theory form the theoretical framework of this study. It determines the variables to be measured and statistical relationships to look for in the study. Furthermore, it provides a general framework for data analysis and selection of a proper research design.

2.2.1 Opportunity–Based Entrepreneurship Theory

The opportunity-based theory is anchored by names such as Peter Drucker and Howard Stevenson. Entrepreneurs do not cause change as claimed by the Schumpeterian or Austrian school. Drucker (1985) entrepreneurs have an eye more for possibilities created by change than the problems. Stevenson (1990) extends Drucker’s opportunity-based construct to include resourcefulness. This theory is of great importance to this study because it calls on entrepreneurs to take advantage of opportunities brought by any change.
2.2.2 Resource Based View Theory

Resource based theory was proposed by Wernefelt (1984). This theory as described by Hitt (1995) holds that the firm's resources are a major determinant of the firm's functioning. The firm's resources can therefore be termed as a source of the firm's organizational strategy and competitive advantage. A company’s resources generally comprise physical, financial, human and intellectual capital (Johnson et al, 2008).

A firm is more likely to formulate better strategies if the firm has adequate resources. When the competencies of resources are well developed, it was a source of competitive advantage (Thompson et. al, 2007). Similarly Hamel and Prahalad (1994) agree the same indicating that the distinctive competences of a firm must have customer value, extendibility, and must be competitor unique for them to attain maximum benefits for the firm. Conversely, the availability of resources is not enough to give the firm a competitive advantage. The firm may have surplus resources but do not have the capability to efficiently use them to their advantage. Competitive advantage is gained from a firm's ability to assemble and fully exploit its resources.

2.2.3 Niche Theory

Niche theory holds that in markets with high competition levels, media organizations produced differentiated products (Dimmick, 2003). This has been demonstrated by the players of the media industry in Kenya. For instance, Citizen TV has come up with the best African programmes and it is commanding in that line, talk shows that impact to communities for example former Luis live, Cheche among others. The theory’s mainly put to light on focusing on a specific market segment. The application would be quite specific to the industry (Dimmick, 2003). Niche theory points to the need to
select a narrow-scope segment (niche market) and be the best in quality, speed, or cost in that market. The theory thus suffices in providing information on the study on the challenges of digital broadcasting and competitive strategies adopted by television media stations in Kenya.

2.3 Digital Broadcasting and Competition – Porters Five Forces Model

The Porter’s Five Forces tool is a simple but powerful tool for understanding where power lies in a business situation. With a clear understanding of where power lies, you can take advantage of a situation of strength, improve a situation of weakness and avoid taking wrong steps. It helps you understand both the strength of your current competitive position, and the strength of a position you are considering moving into.

Threat of New Entry: New entrants to an industry can raise the level of competition thereby reducing its attractiveness. Barriers to entry are advantages enjoyed by incumbents compared to new entrants (Porter 2008). Key barriers to entry include: economies of scale, capital investment requirements; customers switching costs; incumbent merits independent of size unequal access to industry distribution channels and restrictive government policy (Grant, 2008). The presence of economies of scale means that some form of monopolistic competition is most likely to emerge in the industry despite the absence of other constraints of entry (Heap et al., 2005). Large capital requirement brings entry barrier (Bateman & Snell, 2004). The disruptive nature of the new technology did not create a perfectly competitive market. This is because most of these barriers were eroded.
Threat of substitution: A substitute product or service is that which can perform a similar function as the industry’s product or service (Riley, 2012). If substitution is easy and viable, then this weakens your power. For example, advertisers may choose to advertise through other media like the bill boards because they are available and viable. The presence of substitute products can lower industry attractiveness and profitability because they limit price levels. The threat of substitute products depends on: Buyers’ willingness to substitute; the relative price and performance of substitutes and the costs of switching to substitutes. This process of differentiation is attenuated by the competition over quality (Heap, et al., 2005). There is, in effect, another way for any broadcaster to capture audience as competition intensifies. It is not a matter of pitching into some part of the product space that has hitherto not have been served. The broadcaster can also gain audience by improving the quality of their existing products (Heap et al., 2005). When the threat is high, incumbents must hold down prices or boost investments to deter new competitors.

Competitive rivalry: Rivalry exists whenever rivals perceive the pressure or take an advantage of an opportunity to make their market segment better (Dagmar, 2005). What matters here is the number and capability of your competitors. If you have many competitors, and they offer equally attractive products and services, then you will most likely have little power in the situation. Suppliers and buyers will go elsewhere if they don’t get a good deal from you. On the other hand, if no one else can do what you do, then you can often have tremendous strength. It is very important for firms to measure the impact of any change on competition and see that change as an opportunity.
Buyer Power: Buyers may threaten an industry by driving prices down, bargaining for higher quality or more services which reduces profitability. This is driven by the number of buyers, the importance of each individual buyer to your business as well as the cost to them of switching from your products and services to those of someone else and so on. A customer group has negotiating power if there are few buyers, or each one purchases in huge volumes, the industry’s products are standardized or undifferentiated or if buyers face few switching costs in changing Vendors (Porter, 2008). It is therefore a competitive responsibility of the firm to build switching costs for their customers. This is a mechanism by which customer’s loyalty is enhanced. It can be through reward programs good enough to lock in the existing customers among others. Customer loyalty is about establishing the firm’s product or service in the minds of the customer.

2.4. Competitive Strategies

This study focused on three competitive strategies that firm’s can use to continuously outperform other firms in their industry. They are: Resources of the firm, strategic positioning/ market segmentation and cost leadership strategy. The three play a key role in any firm’s outstanding performance.

2.4.1. Resources of the Firm

Resource based theory stresses that every firm is portrayed by its own one of a kind accumulation of assets of center capabilities (Lysons and Farrington, 2012). Accordingly, the wellspring of upper hand is the creation and utilization of particular abilities that are hard to make and keep up, classify and make into formulas, duplicate
and copy and can't just be purchased off the shelf (Kay, 2015). Those holding the asset based perspective of the firm propose that assets are profitable when they empower a firm to institute procedures that enhance productivity and adequacy, take advantage of opportunities, and protect the firm from threats (Barney, 2011). A firm’s resource has to be inimitable, valuable, non-substitutable and rare to lead to a sustainable competitive advantage. Additionally it must be important (Grant, 2008) and dynamic (Johnson, Scholes, Whittington, 2005). Human capital value depends on its capability to add to firm's out performance of other firms as well as center skill of the firm. Like other organizational resources, employee capabilities can be either core or peripheral (Barney, 2011). Center resources, specifically, are imperative to the upper hand of an association and frequently require consistent internal advancement (Quinn, 2012). As indicated by Bettis et al., (2012), outsourcing these sorts of aptitudes may imperil the upper hand of the firm by disintegrating its supply of core abilities. Wright et al., (2011) suggested that with a specific end goal to procure a maintainable competitive advantage an association must be predominant in every key HRM aspect. That is, human capital pool (information, expertise, capacity), employee conduct (psychological contract and authoritative citizenship), and individuals administration works on (staffing, training, rewards, examination, work plan, support, acknowledgment, and communication). A firm that has a strategy to outperform other firms in the industry it must invest highly in a competitive human resource.

Both the rate of innovative change and the speed of technological dissemination have expanded fundamentally. Expanded speed of progress requires quicker securing of significant innovations by firms (Bettis and Hitt, 2015) Firms exist in very turbulent and frequently clamorous situations that create disorder, disequilibrium, and
noteworthy instability. For instance, the presentation of a recent innovation can bring 'blasts of inventive destruction' (Pisano, 2010 and, in this way, discontinuous change (Tushman and Anderson, 2006). In such a situation, the management must come up with new tools, new ideas, new firms, and new attitudes. Advancement is the ability to lower costs, enhance products or launch new ones before your rivals.

Firms exist in highly turbulent and often chaotic environments that produce disorder, disequilibrium, and significant uncertainty. Digital consumer technology which enables convenient ad skipping, today most found in personal video recorders devalues audiences to advertisers. Television stations can sign long term contracts with advertisers therefore protect the revenue stream. They can also partner with producers of the set top boxes so as to raise revenue through subscription. Resource based theory emphasizes that each firm is characterized by its own unique collection of resources of core competences (Lysons and Farrington, 2012). Both the rate of technological change and the speed of technological diffusion have increased significantly. Increased speed of change necessitates more rapid acquisition of relevant technologies by firms (Bettis & Hitt, 2015).

2.4.2. Strategic Positioning

In settling on strategic positioning decisions, firms will put in place certain key positions that rise up out of three particular sources (Porter, 1996). The two most appropriate sources of strategic positioning for television stations facing stiff competition as a result of digital migration are needs-based positioning and access-based positioning. A firm can position itself to meet all the needs of a certain group of clients.
Needs-based positioning: The point is that an organization operating using this positioning has to configure different sets of activities to cater for the various needs. Firms can utilize suitable evaluating procedures for offering items over the Internet. By gathering data about purchasers, TV slots can perform more successful value segregation. Access-based positioning is the sectioning of clients who are available in various ways. For example, the television stations can reach the youth through internet since they are always in internet. Also, audiences who value news alerts can be reached through prompt updates via their phones.

In the television industry some audiences value news, others entertainment and sometimes they want both. The television stations must meet these needs appropriately. Media firms have to employ appropriate pricing strategies for selling products over the Internet. By collecting information about buyers, television stations can perform more effective price discrimination. To remain effectively and efficiently competitive, television stations have to employ promotion strategies different from those used by traditional marketing.

2.4.3. Cost Leadership Strategy

Cost Leadership is one of Porter's generic strategy which focuses on a firm gaining competitive advantage through providing services/products of a lower cost as compared to other firms (Malburg, 2000). The lower costs of the products/services are hypothesized to lure more customers thus increasing the profitability. To gain cost advantage, the firm has to reduce operation costs. A firm that strives to have the lowest cost in the industry offers its products and services to a broad market at the lowest prices.
Television stations in Kenya will have to develop ways to operate in environment with increasing cost and with a potential back drop of revenues and staggering cash flows resulting from digital broadcasting. Minimizing their cost of production would be critical strategic tool to embrace such turbulence within the environment to stay ahead of competition. Organizations embarking on cost reduction strategy must avail commitment and skilled resources. Cross functional organizational support is highly required.
CHAPTER THREE

RESEARCH METHODOLOGY

3.0 Introduction

To research is to carry out a diligent inquiry or a critical examination of a given phenomenon (Mugenda and Mugenda (2008). It therefore implies exhaustive study, investigation, or experimentation following some logical sequence. The purpose of this chapter was to describe the research methodology that was used in this study. It concentrated on the research design, details on the target population, data collection instrument, data analysis and data presentation methods that were used in the study.

3.1 Research Design

A research design is a blue print for data collection, measurement and analysis. It is a plan and structure of investigation conceived in order to obtain answers to the research questions. The research designs in scientific research method are: cross sectional survey, longitudinal survey and case study.

The study used a cross-sectional survey method which is descriptive in nature. The study method was used because of several reasons: it serves a variety of research objectives such as descriptions of phenomenon and discovery of relationships among different variables among others. This enabled the researcher to assess the relationship between challenges of digital broadcasting and competitive strategies employed by television stations in Kenya.
3.2 Population of the Study

A particular population has some characteristics that differentiate it from other populations. One should define the population as consistently as possible with the purpose of the study. The target population is that population to which a researcher wants to generalize the results of the study.

The target population of this study consisted of the 8 main local television stations operating in Kenya as at 1st May 2015. The 8 television stations were: Citizen TV, NTV, QTV, KTN, KTN News, K24, KBC, and KISS TV. This study focused on a known population, television stations owned by the large Kenyan media houses; hence the census method was used.

3.3 Data Collection

The study used both primary and secondary data sources. Primary data was collected from the respondents using structured and semi-structured questionnaire with both open and close-ended questions. Copper and Schindler (2008), state that structured questions necessitate getting as much information as possible from the limited space on the form. The respondents selected for this study were the Managing Directors and the head of departments that included customer service Manager, advertising Manager, Marketing Managers, broadcasting Manager and administration Manager. This is because managing directors and heads of departments have a key responsibility in issues of organizational strategy and performance hence their relevance to this study.
For primary data, the respondents were sought to fill the questionnaires offering their quantitative and qualitative views and experiences on challenges of digital migration and competitive strategies applied in their television stations. The questionnaires were administered through “drop-and-pick-later” method. Secondary data was collected from the selected television stations in order to understand pertinent issues that may not be available from the primary data sources (Bambeger, 2006). Some of these documents included annual reports, strategic plans and quarterly media monitoring reports.

3.4 Data Analysis

The first step in data analysis is to summarize the data using descriptive statistics. The purpose of descriptive statistics is to enable the researcher to meaningfully describe or a distribution of scores or measurements using a few indices or statistics. It gives a good quick picture of how the variables behaved; their distribution (Mugenda and Mugenda (2008). The main types of descriptive statistics are: measures of central tendency which include mode, mean and median as well as measures of variability with the three most commonly used being the range, variance and standard deviation.

This study used both quantitative and qualitative analysis. Quantitative data was edited and coded into Statistical Package for Social Sciences (SPSS) version 21 for analysis to generate descriptive statistics such as mean and standard deviation among others. The study also used frequencies and percentages too as part of the descriptive analysis and the findings were presented in tables and figures. Likert Scale was used.
CHAPTER FOUR

DATA ANALYSIS, RESULTS AND DISCUSSION

4.0 Introduction

This chapter covers the presentation of responses, analysis and findings of data collected from questionnaires. The researcher in attempt to collect data relevant to the study distributed 42 copies of questionnaire to the stations. Out of questionnaires distributed, it’s notable that only 36 which are 86% of the total were filled and returned as Figure 4.1 shows the response rate.

4.1 Response Rate

The researcher distributed 42 questionnaires and only 36 questionnaires were completely filled and returned as indicated in Figure 4.1. This response rate is acceptable and representative and conforms to Mugenda and Mugenda (1999) stipulation that a response rate of 70% and over is excellent.

![Figure 4.1: Response Rate](image)

Figure 4.1: Response Rate
4.2 Bio-data Response

The section presents the data findings on the respondents’ general information. The demographic information included TV station, gender of respondents, their level of education, level in the organization, number of years served in the organization and department. Further, the study sought to know how the media houses passed information to their audience.

4.2.1 TV Station Response Distribution

The researcher carried out the study on eight TV stations. The study targeted four members from the managerial team in filling the questionnaire for each station. Figure 2 presents the distribution.

![Figure 4.2: TV stations response Distribution](image)

The response rate as indicated in Figure 4.2 show that four stations (NTV, KBC, KTN, KTN News, Citizen TV and K24) had their five questionnaires filled while QTV and Kiss TV had only three questionnaires filled.
4.2.2 Department of Work

The study sought to establish the departments in which the respondents worked. The results are shown in Figure 4.3.

Figure 4.3: Department

Study findings indicate that 22% of the respondents were from both advertising and customer service departments, 20% were from marketing department, 19% were from administration and 17% were from the broadcasting department. The findings indicate that all the departments were represented a fact that was much appreciated in the study as the results were of significant impact on general study. This implies that the data collected from the respondents was reliable and valid.
4.2.3 Gender of the Respondents

The study sought to know the gender of the respondents who participated in the study. The study results are indicated in Figure 4.4.

Figure 4.4: Gender of the Respondents

Findings from the study as shown in Figure 4 indicate that majority of the respondents were male with 61% representation while 39% of them were female. This was a clear indicator that there was a fair representation thus there was no gender biasness.

4.2.4 Education Qualification

The researcher sought out to establish the respondent’s highest level of education. The study findings are presented in Figure 4.5.
Study findings as shown in Figure 5 reveal that majority of the respondents were postgraduates with 45% representation, 33% were diploma holders and 22% were degree holders. This was a clear indicator that the respondents had a better understanding on the concepts that were being studied.

4.2.5 Working Experience

The study sought to find out the working experience of the respondents. Figure 4.6 presents the findings.
From the study, it’s noted that majority of the respondents (50%) had worked in their stations for 6-10 years, 22% for less than 5 years, 20% for 11-15 years and 8% had worked for above 15 years. The working experience is revealed by the fact that majority of the respondents had worked for over five years.

4.2.6 Media used to pass information to the audience

The research sought to know how the media passed information to their audience. The study findings below present the results.
Study findings as shown in Figure 4.7 indicate that 25% of the respondents indicated that TV broadcasting and Radio broadcasting was the main media used to pass information to the audience while the rest agreed that radio broadcasting, newspaper and online were also major media sources used to pass information to the audience.

### 4.3 Influence of digital broadcasting on competition: Porter’s Five Forces tool.

The study sought to establish the impact broadcasting has on the competition with respect to the porter’s five forces model. The findings show that majority of the respondents agreed to a very great extent that digital broadcasting has increased competition in the industry. The findings obtained are as shown in the table.
Table 4.1: Porter’s Five Forces Model

<table>
<thead>
<tr>
<th>Statement</th>
<th>Mean</th>
<th>Stdev</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Threat of new entry</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Digital broadcasting has reduced time and money to enter your market and</td>
<td>3.9</td>
<td>1.1286</td>
</tr>
<tr>
<td>compete effectively</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Digital broadcasting has led to little protection for your key technologies</td>
<td>4.0</td>
<td>1.1214</td>
</tr>
<tr>
<td>New competitors can quickly enter your market and weaken your position</td>
<td>3.7</td>
<td>0.8908</td>
</tr>
<tr>
<td><strong>Threat of substitution</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>It is easy for advertisers to find a new media of advertising eg billboards</td>
<td>4.0</td>
<td>1.1287</td>
</tr>
<tr>
<td>The new advertiser is viable</td>
<td>4.3</td>
<td>1.2537</td>
</tr>
<tr>
<td><strong>Competitive rivalry</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The number of your competitors has increased and they offer equally</td>
<td>3.6</td>
<td>0.6627</td>
</tr>
<tr>
<td>attractive products</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Buyer Power</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>It is easy for advertisers to drive prices down</td>
<td>4.1</td>
<td>1.1184</td>
</tr>
<tr>
<td>The cost of switching to your competitor is low</td>
<td>3.9</td>
<td>0.9478</td>
</tr>
<tr>
<td><strong>Overall</strong></td>
<td><strong>3.9</strong></td>
<td><strong>1.0315</strong></td>
</tr>
</tbody>
</table>

On threat of new entry: They agreed to a great extent on Digital broadcasting has reduced time and money to enter the market and compete effectively with a mean of (3.9), Digital broadcasting has led to little protection for key technologies (4.0) and New competitors can quickly enter the market and weaken their position (3.7). Threat of substitution: The results show that, It is easy for advertisers to find a new media of advertising for example outdoor advertising at a mean of (4.0). This is because outdoor advertising is an already established industry and has been offering advertising services.
The new advertiser is viable (4.3). This is because digital broadcasting has fragmented audiences hence weakening the television advertising sector. Mass audience matter a lot to the advertisers and since outdoor advertising has mass audience then the new media of advertising is viable. Competitive rivalry: The results show that the number of competitors has increased and they offer equally attractive products (3.6). Buyer power: It is easy for advertisers to drive prices down (4.1) and the cost of switching to a competitor is low (3.9). Thus overall, digital broadcasting has increased competition to a great extent with a mean of 3.9 and standard deviation of 1.0315.

4.4 Competitive Strategies

4.4.1 Resources of the Firm

The study sought to establish the competitive strategies adopted by television stations. The study investigated on various aspects under resources of the firm adopted by the TV stations in Kenya. Majority of the respondents agreed to a great extent with the following strategies; the TV station works to build a good image to the public (3.6342), the television station does training and considers the welfare of the staff (3.6081), and the TV station does invest highly on IT (3.5820).

Moreover, the respondents agreed to a moderate extent with the following aspects; the management encourages team work and innovation (3.5820) and there is high level of accountability which boosts the internal control of processes (2.9658). Therefore, it can be concluded that the TV station adopted used the internal resources that they had achieve competitive advantage. The study results are presented in Table 4.2.
Table 4.2: Resources of the Firm

<table>
<thead>
<tr>
<th>Resources of the firm</th>
<th>Mean</th>
<th>Std. Dev</th>
</tr>
</thead>
<tbody>
<tr>
<td>Works to build good image to the public</td>
<td>3.6342</td>
<td>1.0951</td>
</tr>
<tr>
<td>The television station does training and considers the welfare of the staff</td>
<td>3.6081</td>
<td>1.3028</td>
</tr>
<tr>
<td>The television station does invests highly on IT</td>
<td>3.5820</td>
<td>1.0786</td>
</tr>
<tr>
<td>The management encourages team work and innovation</td>
<td>3.2279</td>
<td>1.3260</td>
</tr>
<tr>
<td>There is high level of accountability which boosts the internal control of processes</td>
<td>2.9658</td>
<td>1.1033</td>
</tr>
<tr>
<td>Overall</td>
<td>3.36</td>
<td>1.1812</td>
</tr>
</tbody>
</table>

4.4.2 Cost Leadership Strategy.

The study sought to establish various aspects the TV stations employed under the Cost Leadership strategy. Pricing strategy is known to influence the markets for the TV stations and fair pricing is a strategy that most stations used to attain competitive advantage. The mean and standard deviation of the aspects are indicated in table.

Table 4.3: Cost Leadership Strategy

<table>
<thead>
<tr>
<th>Cost Leadership Strategy</th>
<th>Mean</th>
<th>Std. Dev</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pursue the less costly process</td>
<td>3.5342</td>
<td>1.0951</td>
</tr>
<tr>
<td>Charging different prices for different people on advertisements</td>
<td>3.2081</td>
<td>1.3028</td>
</tr>
<tr>
<td><strong>Overall</strong></td>
<td><strong>3.35</strong></td>
<td><strong>1.1989</strong></td>
</tr>
</tbody>
</table>

Source: Research Data

Findings from the study revealed that majority of the respondents agreed to a great extent to the aspect that the TV station pursued the less costly process (3.5342) while the respondents agreed to a moderate extent with the aspect that the station charged different prices for different people on advertisements (3.2081). Therefore, the study
presents an implication that pricing strategy has been a key strategy for the TV stations. This was identified as one of the strategies that again diversify the market awarding the stations a competitive advantage.

### 4.4.3 Strategic positioning /Market Segmentation

The researcher intended to find out the strategic positioning of the TV stations. Various aspects were put under test for the respondents under a five point Likert scale.

**Table 4.4: Strategic positioning /Market Segmentation**

<table>
<thead>
<tr>
<th>Market Segmentation</th>
<th>Mean</th>
<th>Std. Dev</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct based marketing (one-to-one marketing)</td>
<td>3.5901</td>
<td>1.2027</td>
</tr>
<tr>
<td>Offering promotions tailored to specific customer groups</td>
<td>3.3270</td>
<td>1.0826</td>
</tr>
<tr>
<td>Customizes information to reach particular people</td>
<td>2.9306</td>
<td>1.2572</td>
</tr>
<tr>
<td>Do meet-the -people tour to interact with the people at their residence.</td>
<td>2.6216</td>
<td>1.3352</td>
</tr>
<tr>
<td><strong>Overall</strong></td>
<td><strong>3.07</strong></td>
<td><strong>1.2194</strong></td>
</tr>
</tbody>
</table>

Findings from the study reveal that majority of the respondents agreed to the direct based marketing (one-to-one marketing) to a great extent with a mean of (3.5901). However, majority of the respondents agreed to a moderate extent to the following aspects; offering promotions tailored to specific customer groups (3.3270), customizes information to reach particular people (2.9306), and do meet-the -people tour to interact with the people at their residence (2.6216). Further, an interactive marketing was identified to be another key aspect utilized By the TV stations. Products have been design to target the local audience and programmes have been designed to reach audience in their vernaculars. This was an aspect considered to act as a key competitive strategy for the stations. Therefore, the study findings imply that market segmentation has been employed as a competitive strategy by the TV stations.
4.5 Discussions and Findings

The study sought to determine challenges brought by digital broadcasting and competitive strategies employed by TV station in Kenya. Using Porter’s Five Forces model which enables a firm to understand both the strength of their current competitive position, and the strength of a position it is considering moving into, it was revealed that digital broadcasting has increased competition in this industry. The digital broadcasting has made the industry turbulent an aspect that forces the market players to employ competitive strategies.

Threat of new entry: Digital broadcasting has reduced barriers to entry which has always been a source of power for incumbents. The time and money required to enter the market and compete effectively has reduced greatly because one does not need to invest in the traditional broadcasting equipments. Furthermore, there is little protection for key technologies and these two aspects enable new competitors to quickly enter the market and weaken the position of the existing television stations.

Threat of substitution: From the study, it is evident that advertisers can find a new media of advertising for example outdoor advertising. This is because outdoor advertising is an already established industry and has been offering advertising services. Recently, outdoor advertising companies have mushroomed. This is sufficient evidence that digital broadcasting has brought a window of opportunity in the sector. Magnate advertising company had been a monopoly for a long time but this position has been challenged by new companies among them Alliance media, Adsite, Outdoor media to mention but a few. The new advertiser is viable because it has captured mass audience.
Competitive rivalry: The results show that the number of competitors has increased and they offer equally attractive products. Such a situation will force the television stations to lower advertising fee charged on advertisers in order to protect the price sensitive customers. Buyer power: The television stations sell their content to the audience and sell the audience to advertisers. This means that they have two buyers. It is easy for advertisers to drive prices down because they have many options through which they can do brand positioning. They can also drive prices down by demanding that their advertisements be given more time on air. This move was to compensate on the fragmented audience. The cost of switching to a competitor is high and advertisers can advertise through a competitor and get similar benefits.

Various competitive strategies were identified to be used by the stations. Most TV stations worked to build a good image to the target audience. A good image can only be built if the target audience gets satisfactory services. The TV stations were identified to carry out training to their staff. This is a move to ensure that the stations have a highly qualified and motivated staff that would work towards realization of the stations goals and missions. High investment done on IT is a key indicator that the stations were conforming to the dynamic technological world whereby via embracing the use of new technology like the drone technology and dissemination of information through mobile phones helps them achieve a competitive advantage.

Pricing strategy was focused as well and it was found out that most TV stations pursued the less costly process an indicator that they were achieving a competitive advantage. The stations were found to charge different prices for different people on advertisements. Under these aspects, it is a clear indicator that the stations used
pricing strategy to achieve competitiveness. The study findings are in line with Porter’s findings (1980) who noted that a pricing strategy which he termed it as a cost leadership strategy was a key strategy to achieve competitiveness in an industry through having the lowest cost in the industry. Porter further noted that for an organization to achieve cost leadership strategy it has to fairly standardize its products and under pricing than any other market player and this can be achieved only through having a low-cost leadership strategy, and a workforce that is committed to a low cost strategy.

Under strategic positioning and market segmentation, it was found that the stations employed this strategy in that they carried out direct based marketing, offered promotions tailored to specific customer groups, customized information to reach a particular group of people and carrying out meet-the-people tour to interact with the audience at their residency. The findings are in line with Porter’s (1980) and Hunger and Wheelen, (2005) who identified a focus strategy that identifies a target market segment and develops products meeting their specific needs.

From the study, it was identified that market segmentation has seen the stations targeting the local communities and airing their programmes in vernacular languages. For example, Royal Media Services which owns Citizen TV has already launched Inooro TV which broadcasts in Kikuyu language. This aspect is a competitive strategy that involves market segmentation. Porter further argues that the market segment is defined through various aspects like geographical uniqueness, specialized requirements in product usage that can be identified by the segment members.
CHAPTER FIVE

SUMMARY, CONCLUSION AND RECOMMENDATIONS

5.0 Introduction

This chapter presents the summary, conclusions, and recommendations of the study. The chapter is presented as follows: Summary of the findings, conclusion of the study, recommendation for policy and practice, the limitation of the study and finally suggestions for further research are presented.

5.1 Summary of the Findings

The study was to determine the dimensions of competition that TV stations face as a result of digital broadcasting as well as evaluating the competitive strategies adopted by television strategies in Kenya. The study was based on a cross sectional survey where the target population was eight well established TV stations in Kenya. Questionnaires were used to collect the data from the eight television stations. All the stations respondent to the questionnaires even though not all the selected members filled them. Descriptive analysis was done on the data.

The study established that indeed digital broadcasting has negatively affected the revenue stream of television stations as determined by Porter’s Five Forces model. This is because of the following reasons: It has increased the number of television channels available for viewers hence fragmenting the audience, outdoor advertising companies have increased to provide advertising that capture the much sought mass audience by the advertisers, television stations providing equally attractive products
have increased the competitive rivalry. Furthermore, buyers can easily drive prices down. The television station power has reduced this has a negative impact on profitability. This calls for strategies to ensure that the revenue stream of the television stations is protected.

The study found out that several competitive strategies were employed in the selected television stations. Competitive strategies like firm resources, Cost Leadership and market segmentation were identified to play a key role on competitive advantage of the television stations. The television stations offered low cost advertisements and had no fixed charges. The advertising fee varied from one advertiser to another. This strategy was playing a key role in the competitiveness of the firms.

Market segmentation was identified to be another indicator of competitive advantage of the television stations as they had specialized markets that targeted particular groups of people. For example, television programmes were either in English or Kiswahili. They also targeted audiences that were accessed through their mobile phones. Various programmes were also designed according to age, gender among others.

Resources of the firm were found to be of immense importance in achieving competitive advantage. Some of the key areas were: hiring a competitive human resource and giving them regular training, encouraging teamwork and innovation, investing in IT among others. This was found to be possible only if the firm had financial capability.
5.2 Conclusions of the Study

The study concludes that despite the high competition resulting from digital broadcasting, television stations can still remain competitive. Resources of the firm especially the human resource and technology, pricing strategy and market segmentation have been used by television stations to remain competitive. It was noted that majority of the TV stations in Kenya invested highly in qualified and motivated employees and embraced IT. They also utilized pricing strategy and market segmentation in the industry therefore achieving a competitive advantage. This aspect was attributed to the constant review of strategies on quarterly basis and keeping in touch with their market segments through the meet-the-people tours to identify their changing needs.

5.3 Recommendations

The following recommendations are made by the researcher: Disruptive technologies will continue to transform the television industry. The televisions should therefore be proactive in scanning the external environment so as to identify such technologies and take the necessary strategic steps to cushion the firm from adverse effects. This means that heavy investments in Research and Development (R&D) have to be catered for in their budgets. The study also recommends that the television stations should expand their revenue stream from pure advertising to set top boxes subscription. This can be done though partnerships with the producers of the set top boxes. The revenue stream can also be expanded by moving into the outdoor advertising.
Furthermore, television stations should try to strive for the top positions in terms of the most competitive human resource, cost management and differentiation an aspect perceived to bring forth best performance of the television stations. It is necessary to encourage team work and innovation so as to come up with better programmes for the viewers. Regular training of employees is also very important to empower them to work better in the highly changing television world.

5.4 Suggestions for Further Research

The researcher suggests further studies to be made on the following areas: A study to establish other ways in which the stations can achieve sustainable competitive advantage apart from the use of the firm’s resources, market segmentation and appropriate pricing strategy. This is because the study has realized that the television industry will continuously face disruptive technologies. Such a study will put the stations at a better position to deal with such transformations.

Secondly, there is need for a study to examine how better the television stations can take advantage of this disruptive technology and use it as an opportunity rather than a threat. This will enable the stations move into new business areas. This is important for the television media companies because they seem to operate on the same levels and with the same intentions.
REFERENCES


APPENDICES

APPENDIX 1: LETTER OF INTRODUCTION

UNIVERSITY OF NAIROBI
SCHOOL OF BUSINESS
MSC. ENTREPRENEURSHIP AND INNOVATION MANAGEMENT PROGRAMME

TO WHOM IT MAY CONCERN

The bearer of this letter, CATHARINE KAVIHOU MUTHU, Registration No. 26117288712015, is a bona fide student in the Master of Science in Entrepreneurship and Innovations Management (MSc. EIM) degree program in this University.

He/She is required to submit as part of his/her coursework assessment a research project on Entrepreneurial problems. We would like the student to do their projects on real problems affecting firms in Kenya. Your organization has been identified for the study and we would, therefore appreciate your assistance to enable him/her collect data in your reputable organization.

The results of the report will be used solely for academic purposes and a copy of the same will be availed to the interviewed organization on request.

P.O. Box 30197
NAIROBI

JANE MUTURI
MSC. ENTREPRENEURSHIP AND INNOVATIONS MANAGEMENT ADMINISTRATOR
SCHOOL OF BUSINESS
APPENDIX 2: RESEARCH QUESTIONNAIRE

Section A: Demographic Information

1. Name of the television station

2. What is your department in the organization?

3. State your gender
   - Male [ ]
   - Female [ ]

4. What is the highest academic qualification
   - Masters and above [ ]
   - Degree [ ]
   - Diploma [ ]
   - Others specify [ ]

5. How long have you worked in the television station?
   - Less than 5 years [ ]
   - 6-10 years [ ]
   - 11-15 years [ ]
   - Above 15 years [ ]

6. How does your media house pass information to the audience?
   - TV and Radio broadcasting [ ]
   - Newspaper [ ]
   - Broadcast and newspaper [ ]
   - Broadcast, newspaper and Online [ ]
   - Radio broadcasting [ ]
   - Radio broadcasting and online [ ]
SECTION B: Digital broadcasting and competition: Porters Five Forces Model

In the following questions, use a Likert scale of 1-5 where: 5. Strongly Agree, 4. Neutral, 3. Strongly Disagree, 2. Agree and 1. Disagree.

7. Influence of digital broadcasting on competition

The study sought to establish the impact broadcasting has on the competition with respect to the porter’s five forces model. Indicate whether the following are true according to your television.

<table>
<thead>
<tr>
<th>Statement</th>
<th>S</th>
<th>A</th>
<th>N</th>
<th>D</th>
<th>S</th>
<th>D</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Threat of new entry</strong></td>
<td></td>
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<tr>
<td>Digital broadcasting has reduced time and money to enter your market and</td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>compete effectively</td>
<td></td>
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<td></td>
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<td>Digital broadcasting has led to little protection for your key technologies</td>
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<tr>
<td>New competitors can quickly enter your market and weaken your position</td>
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<tr>
<td><strong>Threat of substitution</strong></td>
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<tr>
<td>It is easy for advertisers to find a new media of advertising eg bill</td>
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<tr>
<td>boards</td>
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<td></td>
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<tr>
<td>The new advertiser is viable</td>
<td></td>
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<tr>
<td><strong>Competitive rivalry</strong></td>
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<td></td>
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<tr>
<td>The number of your competitors has increased and they offer equally</td>
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<tr>
<td>attractive products</td>
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<tr>
<td><strong>Buyer Power</strong></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>It is easy for advertisers to drive prices down</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The cost of switching to your competitor is low</td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Overall</strong></td>
<td></td>
<td></td>
<td></td>
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</tbody>
</table>
Section C: Competitive Strategies

Resources of the firm

8. Indicate in the blank spaces whether the following are true according to your company.

<table>
<thead>
<tr>
<th>Strategies</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Neutral</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Works to build good image to the public</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The television station does training and considers the welfare of the staff</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The television station invests highly in IT</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The management encourages team work and innovation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>There is high level of accountability to boost internal control process</td>
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<td></td>
</tr>
</tbody>
</table>

Cost Leadership Strategy

9. Indicate in the blank spaces whether the following are true according to your television station on cost management.

<table>
<thead>
<tr>
<th>Strategies</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Neutral</th>
<th>Disagree</th>
<th>Strongly disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pursue the less costly process</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Charging advertisers differently</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
10. What other pricing strategies does your television station employ?

Strategic positioning/ Market segmentation

11. Indicate in the blank spaces whether the following are true according to your Television Station on promotions and advertisement.

<table>
<thead>
<tr>
<th>Strategies</th>
<th>Strongly agree</th>
<th>Agree</th>
<th>Neutral</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct based marketing (one-to-one marketing)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Offering promotions tailored to specific customer groups</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Customizes information to reach particular people</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Does meet-the -people tour to interact with the people at their residence.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

12. What other segmentation strategy has your television station adopted?

Thank you for your Cooperation
APPENDIX 3: LIST OF LOCAL TELEVISION STATIONS

1. Citizen TV - Royal Media Services
2. Kenya Television Network (KTN) – Standard Group
3. KTN News - Standard group
4. Nation TV (NTV) – Nation Media group
5. QTV – Nation Media Group
6. K24- Media Max
7. KBC- Public

SOURCE: Communication Authority of Kenya 2016