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PIONEERING DISADVANTAGE: CONSUMER REACTIONS TO MARKETING MIX STRATEGIES

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Abstract

Prior research has focussed on the early entrant advantage, although a growing body of knowledge suggests that late movers have been outselling pioneers. In this research, the authors examine the issue of a pay phone service provider in Malaysia. In 1990, the company launches its product and creates an industry, but by the turn of the century, it has a meager 17 per cent of the market share. The Paper examines the specific issue of how a market pioneer has been eclipsed. It is hypothesized that the main cause of the declining sales is the inappropriate marketing mix strategies. The major findings based on a survey include consumers' acceptance level of the product, price, place, promotion, people, process, and physical evidence strategies of the company.

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INTRODUCTION

Existing literature suggests that pioneers have been outselling later entrants in many markets (example, Kalyanaraman and Urban 1992; Robinson 1988; Robinson and Fornell 1985; Urban et al 1986). Empirical analysis of sequential entry explains the advantages associated with pioneering (example Bowman and Gatignon 1996; Carpenter and Nakamoto 1990; Kalyanaraman and Urban 1992; Parker and Gatignon 1996; Urban et al 1986). These studies show that pioneers have substantial advantages, relative to late movers. Examining the impact of innovativeness, Shankar et al (1998), show that pioneers have higher potential markets than non-innovative late movers, and that their diffusion and marketing mix effectiveness are unaffected by diffusion of non-innovative late entrants.

To date, much research has been undertaken to explain the early entrant advantage (Zhang and Markman, 1998), although a growing body of evidence suggests that, in some cases, late movers outsell pioneers (Golder and Tellis 1993; Lieberman and Montgomery 1988; Lilien and Yoon 1990). Other recent research suggests that products that are successful in the early development of a market can maintain a high level of market share for many years (Robinson, 1988; Robinson and Fornell, 1985; and Golder and Tellis, 1993).

Previous research also suggests that the order of entry in the market is an influencing factor in consumers learning about the product. Where category preferences are not defined, the first entrant sets the consumers' beliefs about the ideal combination of attributes in that product category, which becomes a yardstick to judge later entrants (Carpenter and Nakamoto, 1989). Recent research suggests that late entrants in a new product class are usually at a disadvantage; nevertheless, they are more likely to be competitive with a successful early entrant if they manage to be distinctive from the early entrant, rather than being similar to it (Carpenter and Nakamoto, 1989). Extending this work to a familiar product class, it was found that the market consistently remembered more significantly more features (both common and distinctive) of the pioneer than that of a superior late entrant (Kardes and Kalyanaraman, 1992). The difference in recall was accompanied by a higher judged preference for the early entrant than for the superior late entrant. Review of existing literature reveals that not many prior studies have been done on the market leadership support for pioneers in

the Malaysian context; frameworks and theories in the literature have largely remained untested in the Malaysian context.

In this article, we address the issue of a pay phone service provider in Malaysia. In 1990, the company launched its Unifonkad, an alternative method of payment to cash, which uses a prepaid magnetic phone card to make telephone calls via public pay phones. The phone card industry is created and the market overwhelmingly accepts the product. Diffusion has taken place through the market very rapidly; profits are made in the very second year of its operation, these despite heavy investment. Sales reach its peak in 1994, however, sales begin to decline in the very next year after second player makes its entry in 1994. Thus, from being a pioneer and sole market player until 1993, the company has a mere 17per cent market share in 1999, while the second entrant had a 75per cent market share that year. For the financial year 1999, the sales of Unifonkad were the lowest in its nine years of business. As a result of lower sales turnover, the profitability of Unifonkad is in a critical condition.

This paper will address the specific issue of how a market pioneer has been eclipsed by a later entrant. The phone card industry, with a special focus on Time Reach Sendirian Berhad (TR) and its Unifonkad, is examined to evaluate the factors that have contributed to the decline in its market share. Findings, based on quantitative analysis have been reported and discussed to capture the main purpose of the study.

PHONE CARD INDUSTRY IN MALAYSIA

As stated earlier, the phone card industry in Malaysia started in 1990 when TR launched "Unifonkad" into the market. Almost four years later, Telekom Malaysia (TM) introduced its version of phone card using the brand name "Kadfon." A third entrant, Citifon made its presence in 1995 with the phone card brand name "CitifonKad." The market share of the phone card business, in terms of sales volume in 1998, was dominated by TM, which capitalized 75 per cent of the sales volume. TR and Citifon, on the other hand, share the rest of the market at 17 per cent and 8per cent respectively.

The primary objective of having this service was to provide an alternative to consumers when making phone calls. At the beginning of its launch, TR focussed on major cities like Kuala Lumpur, Penang, and Johor Bahru as the initial market. With due success,

the company then launched the product in all major cities of Malaysia, including Sabah and Sarawak, by the end of year 1991.

The product diffused rapidly within the market. As a result of this rapid diffusion, TR enjoyed a steady growth of sales of Unifonkad and generated enormous amount of cash flow to the company. By the end of the financial year 1992, TR recorded more than 1,000 per cent compounded growth in sales. Fuelled by the encouraging environment and overwhelming consumer demand, TR doubled its effort to widen the geographical penetration of cardphone. In 1993, TR installed more than 11,000 units of cardphone compatible telephones at various strategic locations all over the country.

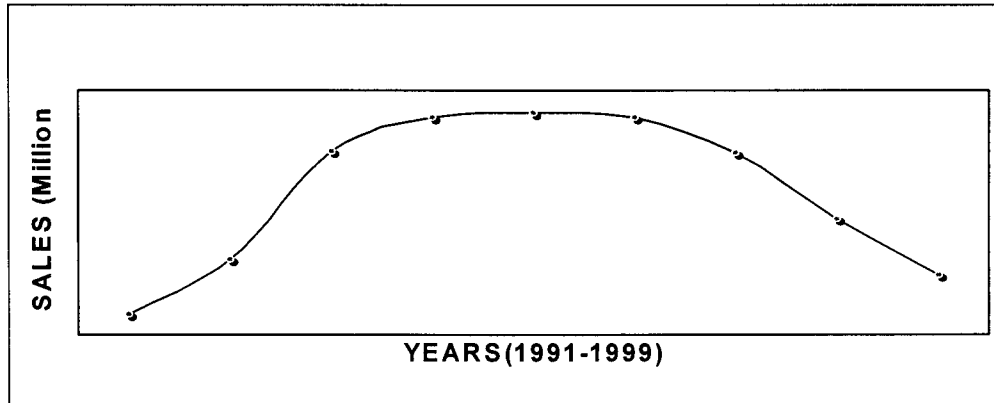
To make a strong presence in the market, TR appointed more than 8,000 dealers/agents as an outlet to distribute the Unifonkad. The dealers/outlets were in differing categories, ranging from newspaper vendors, grocery stores, mini markets, photo shops, and large chain stores. All appointed dealers/agents were given a variable sales commission based on the denomination of Unifonkad sold. The sales commission ranged from 5 per cent to 9 per cent depending upon the denomination of the card. The card phone compatible telephones installed grew from 2,313 units in 1990 to 22,554 telephones by 1999. Likewise, the dealers appointed grew from 1,120 in 1990 to over 8,260 in 1999. It can be seen that the market coverage of card phones has been wide and comprehensive. Its presence in all the states in peninsular Malaysia and East Malaysia is obvious and significant. However, the bulk of the card phone sales come from major cities and town including Kuala Lumpur, Petaling Jaya, Penang, Ipoh and Johor Bahru. This is because these are the areas in which traffic volume is high, easily accessible, and heavily exposed to all kinds of information.

Sales Performance

The sales of Unifonkad enjoyed a steady growth even in the early year of its introduction. From 1990 to 1993, the annual growth rate of Unifonkad sales was tripled. Sales of Unifonkad reached their peak in 1994, when the annual sales turnover was RM91.3 mil. However, sales of Unifonkad began to decline in 1995. By the end of the financial year 1997, the annual sales turnover was only RM47.8 mil., a 50 per cent drop from its peak in 1995. The sale of Unifonkad for 1998 was only RM24.6

mil. For 1999, the sales were in the region of RM18 mil. Figure 1 describes the annual sales performance over a period of 9 years Unifonkad in the market.

Figure 1: Sales of Unifonkad from 1991 to 1999



Source : TR Sdn Bhd

The drastic decline of Unifonkad sales occurred well before the period of economic downturn in 1997/98. Of late, Telekom Malaysia, the local telecom giant, through its payphone subsidiary, has been leading the market with encouraging sales turnover. Citifon has recorded a similar experience with its market share steadily expanding over the years.

Profitability Performance

The phone card business is a little different from the coinphone business. The main difference is the cost of card. In the coinphone business, obviously, there is no cost to the coin, whereas, in the phone card business, TR has to pay the cost of producing the blank Unifonkad and paying sales commissions to the dealers/agents. Another major operating cost for Unifonkad business is the cost of depreciation of card phones and the cost of spares for their maintenance. There are three variable costs, including the cost of blank cards, commissions to agent, and the interconnect charges (that is, the fee that TR has to pay to Telekom Malaysia for using its public Switching Telecom network). The rest of the costs within the structure remain virtually fixed and are not dependent on the type of card sold. The detailed cost analysis of each denomination of cards is shown in Table 1.

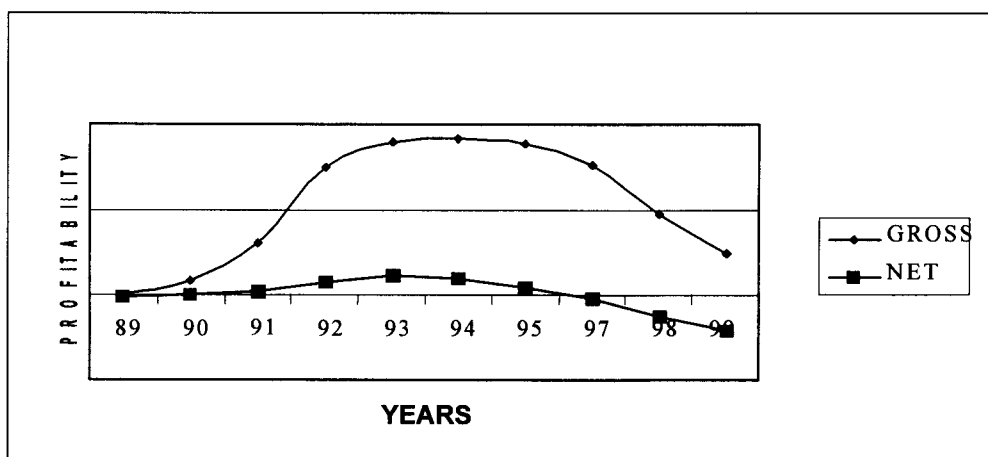
Table 1: Profit Analysis of Each Unifonkad Sold

<i>Type of Card</i>	<i>RM5</i>	<i>RM10</i>	<i>RM20</i>	<i>RM30</i>	<i>RM50</i>
Revenue	5.00	10.00	20.00	30.00	50.00
Cost of blank card	1.40	1.40	1.40	1.40	1.40
Commission to agent	0.25	0.70	1.40	2.10	4.50
Interconnect charges	2.75	5.50	11.00	16.50	27.50
Other variable cost	1.30	1.30	1.30	1.30	1.30
Deprecations	1.50	1.50	1.50	1.50	1.50
Other fixed cost	0.30	0.30	0.30	0.30	0.30
Net Operating Profit	-2.50	-0.70	3.10	6.90	13.75
% Profit vs. Revenue	-50%	-7%	16%	23%	26%

Source: TR Sdn Bhd

From Table 1, it is obvious that it does not make economic sense to market the RM 5 denomination of Unifonkad. However, these cards had to be introduced and retained in the market to enable the consumers to sample the new product. Only Unifonkad's denominations of RM20.00, RM30.00 and RM50.00 are profitable for circulation in the marketplace.

The overall performance of Unifonkad profitability since the product was launched in 1990 until 1999 is as shown in Figure 2.

Figure 2: Unifonkad's Profitability Measure (1989-1999)

Source: TR Sdn Bhd

From Figure 2, it is evident that the Unifonkad business has been profitable since 1991, that is the second year after the product was launched until 1995. From 1996 onwards, the business started to show a loss without any sign of recovery even though various short-term efforts have been put in place. In 1998, Unifonkad business recorded the biggest ever loss in 9 years. This severe loss has pulled down the profit made from the coin phone business, contributing to the overall loss in the consolidated statement. Experiencing such an event, TR is now at the crossroads as to whether to continue the Unifonkad business. New strategic measures to revitalize the business should immediately be taken before the business completely fails.

RESEARCH DESIGN

We consider the fact that the potential for a phone card business is enormous since the other two competing companies are doing remarkably well in the market. The degree of substitution for this service is considered as virtually none, and the life cycle of phone card business is at a growth stage in both domestic and international markets. Further, looking into the fact that TR had monopolized the market when introducing the Unifonkad, the market awareness of its product can be said to be undeniably high. The problem of product awareness and acceptance (the external factors) are expected to be very minimal. Looking into all these, the problem that contributes largely to the decline in sales of the phone card is believed to be more related to the internal factors, that is to say, the product/service marketing mix.

Based on all these arguments, we hypothesize that the main cause to the decline in sales of Unifonkad is inappropriate marketing mix strategies pursued by TR. Therefore, this study aims to evaluate the marketing mix strategies pursued by the company from a consumers' perspective. A structured questionnaire was developed and administered to all the chosen respondents. The questionnaire focussed on the areas of product awareness, product preferences, and acceptance levels of the different levels of the marketing mix.

The target population included people in the age range of 11 to 30 years, who are considered by the company as the target market. There has been no gender limitation, or segregation on the basis of ethnicity. A total of 1000 survey instruments were distributed for the purpose of data collection. Data was collected using the mall-

intercept survey technique (Bush and Hair, 1985) on the main streets and/or squares of the respective region's main shopping districts. While by no means perfect, the mall-intercept approach can result in "a sample, which, while not strictly representative, may nonetheless be relatively free of any systematic bias" (Douglas and Craig, 1983). To enable an equitable coverage, the questionnaires were evenly distributed to all parts of the country, with 250 questionnaires allocated to each of the following regions:

- Southern parts covering N. Sembilan, Melaka and Johor states.
- Northern parts covering Perak, Penang, Kedah and Perlis states.
- Eastern parts covering Terengganu, Pahang and Kelantan states.
- Central parts covering the Federal territory of Kuala Lumpur and Selangor state.

Out of 1000 sets of questionnaires distributed, 698 were completed and returned, which gives a response rate of about 70 per cent. Of these 698 responses, 590 were usable, as the remaining were only partially complete. Table 2 summarizes the details of the survey participants. There has been an almost equal distribution of participants on the basis of gender. Over two-thirds of the respondents fall under the age group of 25 years. As Malaysia is a multi racial society, the respondents were asked to indicate the race to which they belong. About 70 percent belonged to the Malay race, 22 percent the Chinese and about 6 per cent were Indians, this sample reflects the overall racial distribution of Malaysia. Almost one half of the respondents were students and job seekers. Over 60 per cent of them had completed their high school leaving certificate.

ANALYSIS OF SURVEY RESPONSE AND DISCUSSION

To get an overview of the general and specific product awareness, respondents were asked to indicate their usage and preference for phone cards. Of the total responses, 11.9 per cent claimed they never use card payphone, 78.8 per cent used one fewer than 20 times a month, and only 9.3 per cent used one more than 20 times a month. Of these, 43.2 per cent preferred to use Kadfon when making a call using card payphone, 44.1 per cent used Unifonkad most of the time, and only 12.7 per cent used Citifonkad.

Under a situation where the respondents had no choice but to purchase Unifonkad, 79.7 per cent indicated that they would buy Unifonkad to make a phone call and 20.3 per cent chose not to buy any phone card at all. On the issue of level of awareness of

Table 2: Profile of the Survey Participants of the Research

<i>General Description</i>	<i>Component</i>	<i>Total</i>	<i>per cent</i>
Gender	Male	275	46.6%
	Female	315	53.4%
Age Group	11 to 15 yrs.	80	13.6%
	16 to 20 yrs.	220	37.3%
	21 to 25 yrs.	185	31.4%
	> 26 yrs.	105	17.8%
Ethnic	Malay	410	69.5%
	Chinese	130	22.0%
	Indian	35	5.9%
	Others	15	2.5%
Employment	Student	260	44.1%
	Job-seeker	15	2.5%
	Working	315	53.4%
Education level	SPM	360	61.0%
	Cert/Diploma	170	28.8%
	Degree	60	10.2%

Unifonkad's in the market, 75.4 per cent of the respondents thought that the RM 5.00 denomination of phone card was still circulated in the market and 21.2 per cent correctly identified all the denominations sold in the market. Analyzing the response using the mean it was found that the level of product awareness, particularly Unifonkad and card payphone, in general, is very low only at 38.6 per cent. This indicates that the population is inclined towards other types of phone cards in as far as payphone usage is concerned.

Product

To evaluate the level of acceptance of the current product mix, the respondents were asked to answer six questions which focus on the product both tangible and non-tangible aspects. Only 32.2 per cent of the respondents felt that Unifonkad is different from the other phone cards. However, 67.8 per cent believed that Unifonkad is exactly the same compared to the other phone cards. Picturesque design on the phone card was found to be a feature of attraction as 66.9 per cent of the respondents gave this a consideration when making a purchase. About 33 per cent felt that design did

not bring any added value to the phone card. As expected, 94.9 per cent of the respondents demanded replacement when their newly purchased Unifonkad gets faulty. About 5 per cent of the respondents did not replace their spoiled Unifonkad. A high level of technological awareness has resulted in 78 per cent of the respondents feeling more confident to use chip cards rather than the magnetic ones. Quality of service of the Unifonkad payphone was quite a critical issue, with 85.6 per cent of the respondents reporting that they were not satisfied with its performance. Only 14.4 per cent believed that the service quality was acceptable. Almost three quarters of the respondents encountered a faulty card payphone, while 26.3 per cent claimed that they never encountered such an experience when using card payphone. The level of product mix acceptance by the survey respondent is at 35.7 per cent, which implies that, for each Unifonkad circulated in the market, rejection rate based on product attractiveness was almost 50 per cent.

Price

Under the pricing analysis, the respondents were asked to evaluate the elements of price mix to determine its acceptance level. There are four questions to evaluate the pricing attractiveness. In terms of the denominations of card sold, an overwhelming 89.8 per cent of the respondents agreed that the choice was flexible. Only 10.2 per cent felt that the value of sale was too rigid. In terms of affordability of Unifonkad in the market currently, only 15.3 per cent felt it is affordable and 84.7 per cent claimed that Unifonkad was expensive. Although the survey respondents felt that Unifonkad was expensive, 78.0 per cent agreed that using Unifonkad was a value for the money. Almost a quarter of the respondents felt that the perceived value did not equate to the amount of money paid. It was quiet interesting to note that 77.1 per cent of the survey respondents did not favor the idea of 'pay first, use later' concept, which is the underlying principle of the phone card business, the remaining, however, are prepared to accept this concept. The general acceptance level of pricing mix by the survey respondent was at 51.5 per cent.

Place

Under this element of marketing mix, respondents were asked to evaluate the availability of Unifonkad and the location of card payphones in the market place. The aim of the survey is to measure the provision of services through making the product

accessible to meet the customer requirements. Fifty five per cent of the respondents stated that the Unifonkad was not easily available, while the remaining 45 per cent found it easy to obtain. On the issues of the pay phones, where the card could be used, 64.4 per cent of the respondents agreed that the phones were widely available, the remaining 35.6 per cent faced difficulties in finding card payphone. About 90 per cent of the respondents agreed that, for each Unifonkad outlet, there must be a card payphone nearby and the other 10.2 per cent of the respondents did not care much for that arrangement. Seventy seven per cent of the respondents stated that any shop could be the agent to distribute Unifonkad, while 22.9 per cent of the respondents believed only certain shops would be suited to sell Unifonkad. The level of acceptance on the place or distribution of Unifonkad and availability of card payphone based on the above findings is only 39.8 per cent.

Promotion

Promotion is the most important marketing element in marketing strategies developed by any organization. Promotion, if effectively deployed, may put the organization close to the market and its customers. Evaluating the promotion mix applied by organization, the following findings were recorded. About 81 per cent of the respondents admitted that they had not seen any Unifonkad advertisement anywhere for the last six months. Only 19 per cent recalled that they have seen it advertised somewhere. When the respondents were asked whether they were aware of the fact that Unifonkad sells the RM50 cards at a discounted price, only 8.5 per cent of the respondents indicated that they were aware and the remaining 91.5 per cent were not aware of this discounted price. It is quite obvious that Unifonkad's customers were having a problem recognizing the sales outlet, as 61 per cent of the respondents acknowledged that they were having difficulties in finding one. However, 39 per cent of them agreed that Unifonkad sales outlets were quite easy to recognize. Just a little over 60 per cent of the respondents' felt that Unifonkad was not prominently displayed within retail premise outlets. However, 39.8 per cent believed that the product was displayed at a prominent place within the retail shop. In so far as whether a sales representative had approached the respondents from the organization directly to promote Unifonkad, 100 per cent of them said they had never encountered such instances. When asked whether the respondents have seen the Unifonkad brand name was printed on any sponsorship material lately, only 8.5 per cent of them admitted to have seen one and

91.5 per cent had not seen this at all. The level of effectiveness on the promotion strategy of Unifonkad, based on the above findings, is only at 19.1 per cent.

People

Considering the fact that people play a crucial role in the delivery process of services, the 'people' element is becoming important within the marketing mix in the service industry. Respondents were asked whether they had experienced any unpleasant situations when dealing with the retail outlet personnel or the staff from the company. Over 80 per cent of them had no problems with the staff, while 18.6 per cent reported they were not satisfied. About 40 per cent of the respondents found the support staff helpful in giving any assistance to them when they faced any difficulties. However, 59.3 per cent of them were non-satisfied customers. That the sales personnel were well trained was stated by 64.4 per cent of the survey respondents, however, 35.6 per cent of the respondents believed that the sales staff was not well trained. The level of effectiveness on this strategy by Unifonkad, based on the above findings, is only at 47.5 per cent.

Process

Process is another critical element in service marketing as it depicts the ability of both people and the organization itself to maintain high quality standard. Under this element, the respondents were asked to evaluate the processes adopted by the organization. When asked about the ease of replacement of faulty or defective Unifonkad, 62.7 per cent of the respondents remarked that they had an unpleasant experience, while 37.3 per cent said that they had never experienced such instances. 72 per cent of the respondents said that they had encountered a wild goose chase experience when lodging a complaint and 28 per cent were happy with the process. Over 61 per cent of the respondents admitted that they had to wait a long time before the complaint was attended to and 38.1 per cent said their complaint was handled promptly by the service center. When the respondents were asked whether they had received any feedback from the company on their complaints, 66.9 per cent said they had not received any answer, while 33.1 per cent said otherwise. The effectiveness of the process strategy deployed by the organization, based on the above findings, is only 38.6 per cent.

Physical Evidence

This is the tangible element that the customer could see and feel with his/her senses. Thereon, the customer will develop certain perceptions of the product that the organization intended to market. As such, preserving the right physical evidence will certainly make the product more marketable as the customer develops the right perception towards the product. For this element, the respondents were asked to indicate the effectiveness of the physical evidence as perceived by them. When the respondents were asked whether they felt at ease when making a phone call using a card payphone, only 28.8 per cent responded positively and the remaining 71.2 per cent felt otherwise. Over 70 per cent of the respondents felt that the design of the payphone and the place of its installation were not attractive and only 28.0 per cent of them found they were attractive and easily recognizable. An overwhelming 98.3 per cent of the respondents agreed that the payphone housing will be attractive if lighted and 1.7 per cent felt no different. When asked whether the card phone was user-friendly or not, 92.4 per cent of the respondent expressed the opinion that it was, while the remaining 7.6 per cent felt it was not so. The effectiveness of the physical evidence strategy, as deployed by the organization, based on the above findings, is only 16.5 per cent.

FINDINGS AND CONCLUSION

The primary objective of this study was to find the reason as to why a market entrant loses its competitive edge to a later entrant. Given that the industry offered good opportunities, it was surmised that the fundamental marketing mix strategies adopted by the organization was not acceptable to the market. The basis of evaluation was to make a comparison between the marketing mix strategies applied by the organization against a response from a randomly picked sample of respondents. Since the core product of the organization is to provide the payphone services to the general public, the application of service marketing mix was then analyzed. The summarized research result is tabulated in Table 3.

Table 3: Findings Summary Based on Service Marketing Mix Elements

<i>Awareness & Marketing Mix Element</i>	<i>Acceptance Level</i>
Product Awareness	38.6%
Product	35.7%
Price	51.5%
Place (Distribution)	39.8%
Promotion	19.1%
People	47.5%
Process	38.6%
Physical Evidence	16.5 %
Overall	35.9%

The overall acceptance level for the product awareness is 38.6 per cent. Customers are not sure of the Unifonkad denominations available in the market. Low product exposure may erode the product acceptance in the market thus making them hard to market. Customers find Unifonkad as *a homogenous product* that which is no different from cards offered by other companies. Customers preferred a good design of phone card and demanded replacement, should the phone card be defective. Serviceability of the card payphone plays a significant role in customers' decision to purchase a particular phone card. Customers believed that the services of Uniphone's card payphone was not at the satisfactory level as a number of phones were out of service.

As for price, consumers have found the choice of Unifonkad denominations as flexible and adequate. Customers have found the phone cards to be a value for money, although, the price factor remains constant for other competitors and the pay phones. Customers have found that it is quite difficult to purchase Unifonkad, as the sales outlets are not easily available. However, the card payphones are widely available for use. Most of the customers prefer to have a card payphone near to each of the sales outlet. Provision of adequate services is an important factor. Merely distributing Unifonkad card and even installing card payphones widely, is not, by itself, sufficient to attract customers to use Unifonkad. The promotion has remained a weak marketing mix element. Proper communication has not been made with the market to remind the customer about the products or even its existence, as reflected from the survey.

Overall acceptance level for the existing marketing mix employed by TR was only at 35.9 per cent. This acceptance level is average but skewed to lower end. From this, it can be concluded TR has been losing to the later entrants, obviously due to shortcomings in its marketing mix strategies. This appears to have diminished the confidence level of the customers, thus driving them away to switch to other competing products.

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