

Kenya Digital Life 2010

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A digital revolution is underway and managers need to heed the call. It is not just about jumping on the digital train. It is about understanding the implications, the dangers, the opportunities and the consideration set. This paper will reveal the results of an on-line study to better understand Kenyans' on-line habits and attitudes. The study will explore a range of themes relating to use of the internet, including the internet in our lives, social life and engagement, e-commerce, marketing, knowledge and social services. Note that the most interesting and insightful results to help marketers will go into the presentation to the MSRA.

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Introduction to Kenya Digital Study

Objectives

This document reports the results of a study to improve understanding of the habits and attitudes of internet users in Kenya. The guiding objectives of the information are:

- To help organizations up-to-the-minute understanding of how people in Kenya use the internet
- To provide new analysis of the consumer and what motivates them to behave in particular ways when they are on-line
- To understand the needs of users of the digital space in Kenya so as to harness opportunities and drive innovation of services for the future

Themes

The discussion around internet usage in Kenya is guided by 6 themes. These themes summarise motivations on a general level as to the interaction with internet. These are:

1. The Internet in our lives
2. Social Life and Engagement
3. Buying and Selling
4. Knowledge
5. Marketing & Advertising
6. Government of Kenya and social services

Methodology

Quantitative online interviews were employed. A total of 6800 respondents were targeted and from this number, 1725 respondents completed the survey. The sample was then filtered by respondents who currently reside in Kenya. The resultant final sample was 1669 on which the rest of the study results are weighted. Below is the unweighted sample structure that resulted from the study.

Table 1: Sample structure from the study

BASE: Total Sample	1669
Male	81
Female	19
Occupation	
Employed by organization	67
Self employed	19
Unemployed	6
Student	8
Homemaker	1
Location (Province)	
Nairobi	73
Rift Valley	8
Central	6
Coast	6
Eastern	3
Nyanza	2
Western	1

(Column percentages, unweighted)

A further 20 in-depth interviews were conducted with Internet users in Nairobi to profile their needs. Below is the profile of the respondents interviewed.

Table 2: Qualitative Sample Structure

AGE	Users	Gender
15- 18 Years	Cyber	Male
		Female
	Home	Male
		Female
	Mobile	Male
		Female
19 -24		
19 -24 Years	Cyber	Male
		Female
	Home	Male
		Female
	Mobile	Male
		Female
25 - 35		
25 - 35 Years	Cyber	Male
		Female
	Home	Male
		Female
	Mobile	Male
		Female
	Work	Female
		Male

Weighting

Previous studies conducted by TNS Research International in Kenya have shown that the gender split of internet users in Kenya is roughly 56% male and 44% female. We therefore used weighting factors to achieve this. The maximum weighting factor used was 2.415789 while the minimum weighting factor was 0.691358.

Executive Summary

Internet in Our lives

Internet penetration in Kenya is highly concentrated in Nairobi compared to the other regions. The effect of this is a risk of continued marginalization of people outside the city from the digital world. This may in turn discourage high level investments in the digital arena in regions outside the city and consequently, the level of development may remain relatively low.

Interaction with internet is a daily affair. With 62% of the internet users using it for upto 5 times a day, their interaction with internet could easily surpass the duration they have with traditional media such as radio, television or newspapers.

The most important component of internet use is communication through email where almost all internet users have an email address. Use of search engines is almost equally as common and news websites are equally important in the lives of internet users.

Whereas most internet users are connected for between less than 30 minutes to 2 hours, consensus amongst the majority of them (77%) is that they are not spending enough time online. But the main barriers to using internet as much as they would like are cost (59%) and speed of the connection (53%).

It maybe obvious to say that internet is important. This importance is best put into comprehension by asking users what item they would carry to a desert island given a choice. A good majority (63%) would choose a PC connected to internet. Interesting, a mobile phone comes in as second choice.

Social life and Engagement

Online chatting is the most common way of staying “together” in the digital world and is used by 89% of internet users. However, social networking is encroaching into this space especially because the instant messaging service is integrated within social networking sites. A majority 85% of the internet users are using this service and the main motivation for this is that it enables people to keep in contact with people they wouldn't normally be in contact with.

Interestingly, 48% of the social networkers have met up in person with an old friend. It is this reunion that adds to the strength of social networking sites. On a more business note, about 56% have joined a fan group of a brand. These groups of people easily become effective ambassadors for a brand.

Facebook tops the list of social networking sites with 96% of the social networkers being a member. Hi5 and Twitter are a distant second position. The most intriguing aspect is that about a quarter of the social networkers visit their favourite social networking site more than 5 times in a day. This has tremendous implications and opportunities in terms of the level of interactions these users can have with members of their networks.

Buying and Selling

At least three quarter of the internet users have researched on a product or a service online. Actual purchase online is not very common as this approximately involves three in every ten internet users.

However, when it comes to searching for information, a majority of the users are interested in detailed information about the product or the services they are searching into. Another huge majority are interested in comparing prices with other products that are available.

The implication is that sites for brands, products and services must include such important information in order to meet the needs of the internet users and to encourage online transactions.

This will however not be possible if the online consumers continue to feel that online purchase services are not available. Nearly a quarter of those who have searched for products and services online feel that delivery services for the products is too expensive. A further fifth of the online consumers do not have the means to make online payments.

With available means of payment such as mobile payment services, there opportunity to encourage online transactions. Infact, Kenyan internet users would like to pay their bills (51%) online and to do online banking (39%). This clearly spells the need to make such services available and raise awareness about them.

Knowledge

On the local front, 89% of the internet users feel that there are not enough Kenyan based websites at the moment. It is not a surprise therefore that on average, Kenyan internet users spend on average 71% of their online time on foreign-based sites.

Among the most pressing needs for local content is educational materials (61%), online courses (54%) and information on training (51%). A look at these three top needs reveals online consumers in need of upgrading their knowledge and skills. Significantly important is the need for health information. Nearly half (47%) of the internet users would like to access diagnosis information on various diseases and conditions that they or other people they know are suffering from.

Marketing

Search engines are the main tools that drive brand awareness online. A huge majority (90%) state that they have learnt of brands through search engines. Interestingly is that 45% of these consumers have made a purchase decision after seeing an advert online. The power of digital in influencing purchase decision making and spend can therefore not be underestimated.

Some of the websites that have been most appealing include mobile phone manufacturers and mobile service providers. On the international front, most internet users have been impressed by the Nokia official website while on the local front, the Safaricom website has been the most captivating.

Government of Kenya and Social Services

Upto 80% of internet users have searched for government information online. This explains the importance of digitizing government services.

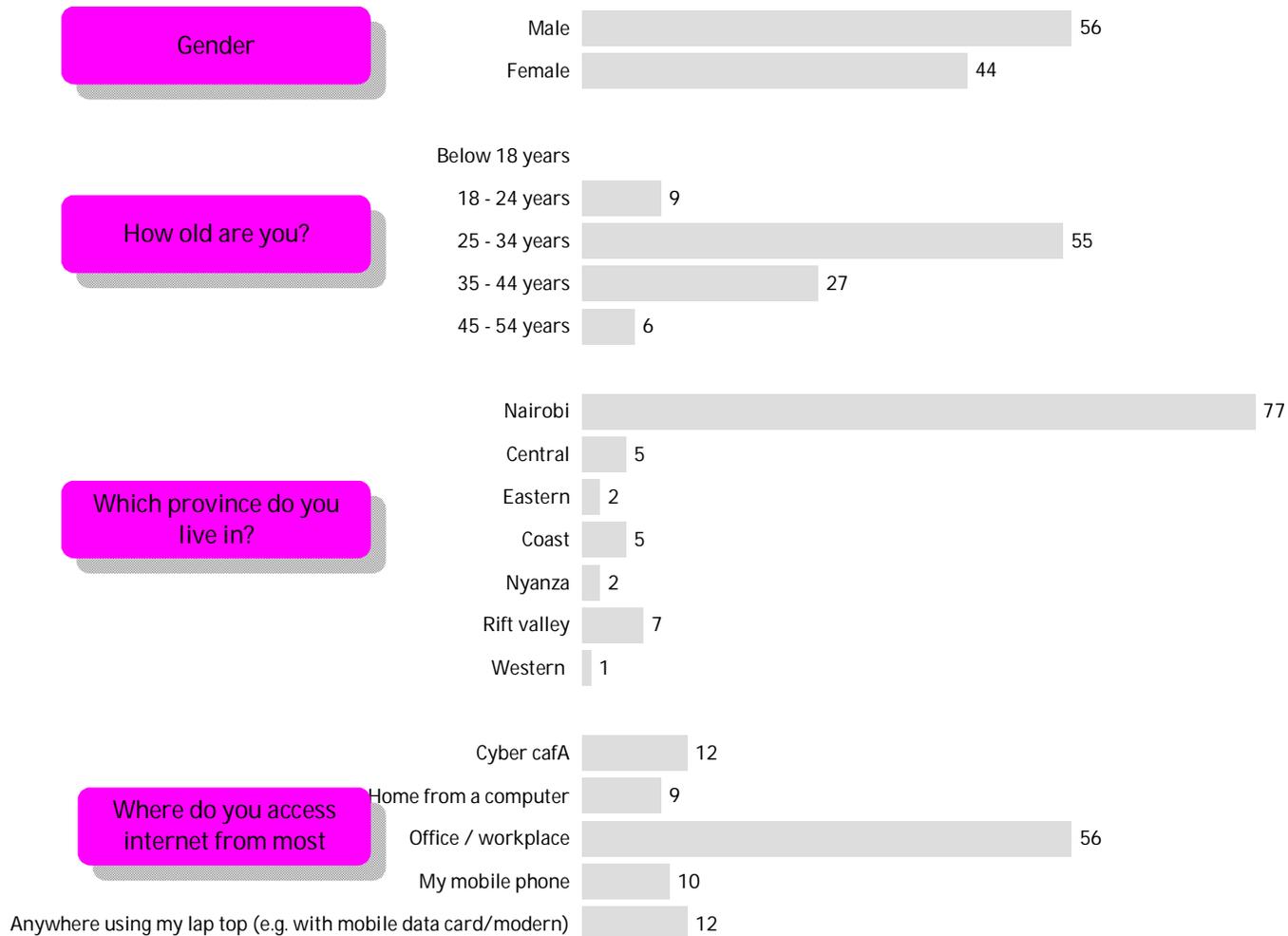
The most visited government or para-statal website is that of the Kenya Revenue Authority followed by the Public Service Commission. KNEC, HELB and Central Bank of Kenya websites are also quite popular with visitors.

Most importantly is the type of online service internet users would like to get from government. Identification card and passport application services are top on the list of priorities for internet users. A majority (65%) would also like to submit their tax returns online whereas more than half (54%) would like to monitor development projects online.

Main Findings

Internet in Our Lives

Figure 1: Respondent profile
Base: 1669 internet users



The distribution of internet users varies across different variables. There are more men accessing the internet compared to women. Considering age, internet usage is mainly driven by the 25 to 34 year age group while most of the internet users are located in Nairobi. On the hand, internet is more available and used mostly in offices followed by cyber cafes. Interestingly, the proportion of people who access internet anywhere with an internet connection using a laptop is significantly high.

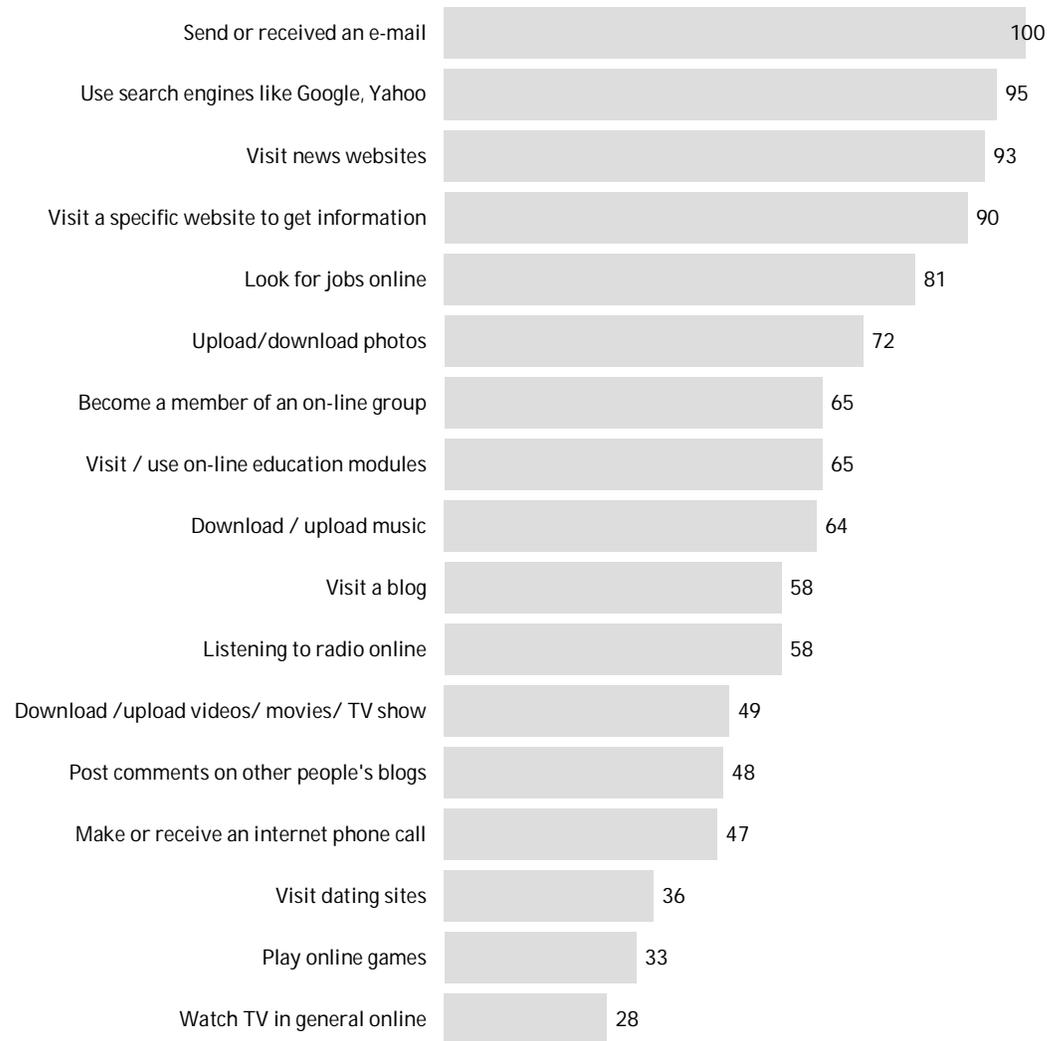
Figure 2: Frequency of accessing internet
 Base: 1669 internet users

How often do you use internet?	BASE: Total Sample	Age				
		18-24 yrs	25-34 yrs	35-44 yrs	45-54 yrs	55+ yrs
BASE: Total Sample	1669	169	947	422	112	19
More than 5 times a day	62	50	66	61	55	50
2-5 times a day	17	20	15	16	25	39
At least once a day	14	17	13	16	16	11
2-3 times a week	4	9	3	4	2	-
At least once a week	1	1	1	1	1	-
Less often than once a week	1	2	1	1	1	-

(Column percentages)

A majority of internet users interact with the internet on a daily basis. Internet users aged between 25 and 44 years use internet relatively more frequently compared to internet users in other age groups. Interesting

Figure 3: Uses of Internet – Activities ever done on the internet
Base: 1669 internet users



Communication through email is one of the main uses of internet among Kenyans today. Searching for information using search engines such as Google or Yahoo is the second most common activity among internet users. Smaller proportions have visited a blog or listened to radio online. Among the least common internet activities is watching TV in general online or playing games online that require internet connection.

Table 3: Duration of time spent on internet

Base: 1669 internet users

Last time you used internet, how long did you spend actively engaged on it?	How long was the internet connected?						
	BASE: Total Sample	1 - 30 minutes	31 mins - 1 hour	1 and 2 hours	2 and 5 hours	5 and 8 hours	More than 8 hours
BASE: Total Sample	1669	113	212	248	190	209	697
1 - 30 minutes	11	63	12	6	3	8	9
31 minutes - 1 hour	23	23	70	20	9	15	15
1 and 2 hours	23	8	13	64	19	17	19
2 and 5 hours	22	4	2	8	61	23	22
5 and 8 hours	13	2	2	2	6	34	19
More than 8 hours	7	-	1	1	1	3	16

(Column percentages)

The above table looks at how long internet users stay engaged to the internet connection on average. The table also looks at sub groups of respondents by how long the internet is connected and the proportion of users who connect to the internet only for the duration of their engagement.

More than half of the internet users who participated in the survey spend from less than thirty minutes to two hours online while a smaller proportion of about twenty percent spend more than five hours.

Figure 4: Would you like to spend more time on the internet than you currently spend?

Base: 1669 internet users

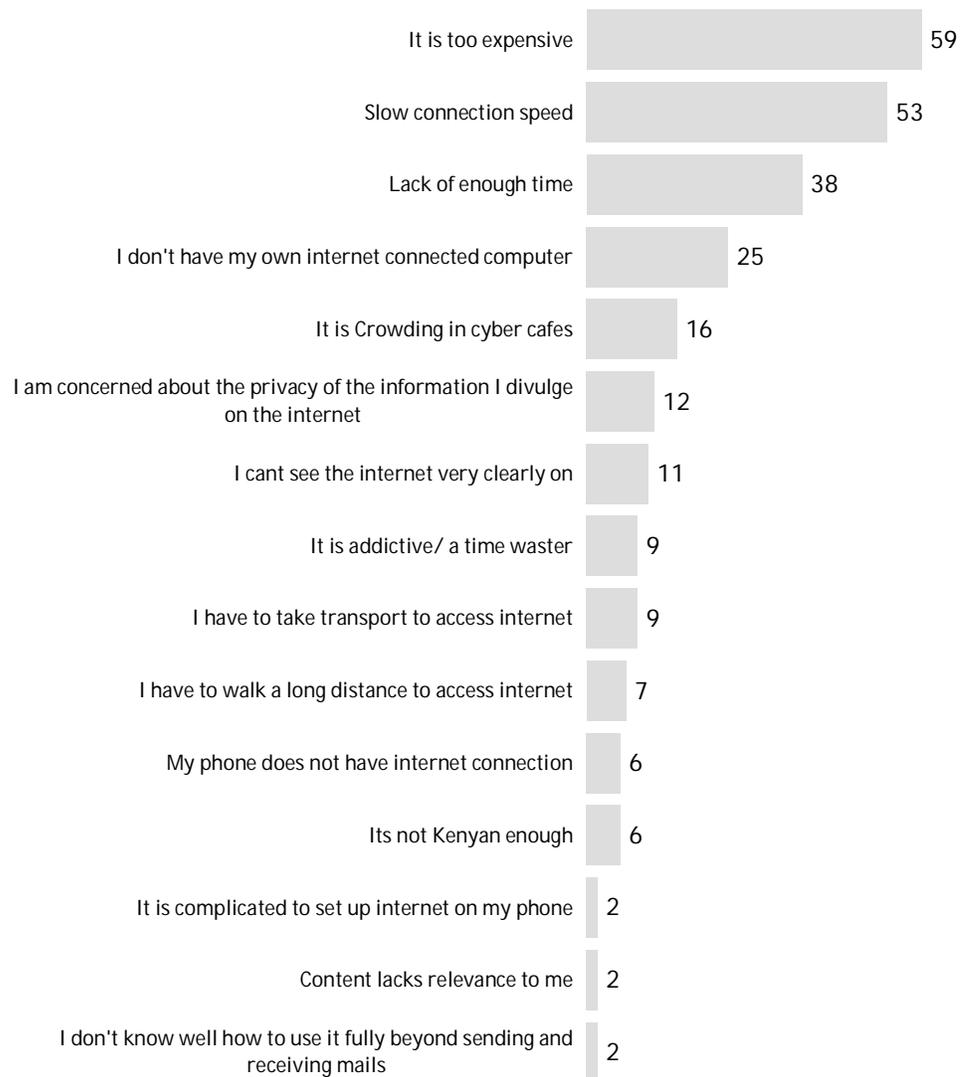
Would you like to spend more time on the internet than you currently spend?	Last time you used internet, how long did you spend actively engaged on it?						
	BASE: Total Sample	1 - 30 minutes	31 mins - 1 hour	1 and 2 hours	2 and 5 hours	5 and 8 hours	More than 8 hours
BASE: Total Sample	1669	197	379	401	346	223	123
Yes	77	80	81	77	75	78	79
No	22	20	19	23	25	22	21

(Column percentages)

The cost of internet connection inhibits the duration an internet user can stay engaged to the internet. We asked if users were spending enough time online and more revealing is that a majority of users feel they are not spending enough time online as they would like. This is especially related to users who are connected for less than thirty minutes to one hour in a single session.

Figure 5: What prevents you from using internet as much as you would like?

Base: 1305 internet users who would like to spend more time online



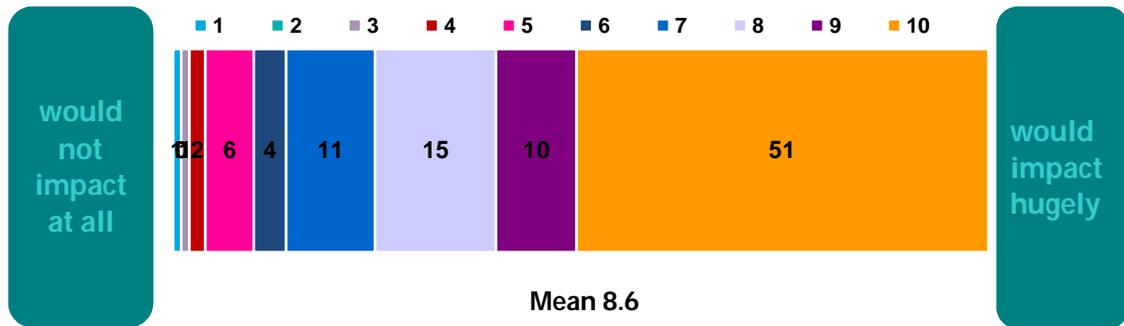
Cost is the most significant barrier to using internet as 59% of the users find it expensive. Speed of connection is another important barrier to using internet. Lack of enough time affects more than a third of the internet users whereas not having a computer connected to the computer limits 25% of the internet users to be connected as much as they would like.

Importance of Internet

Figure 6: Impact of not having internet

Base: 1669 internet users

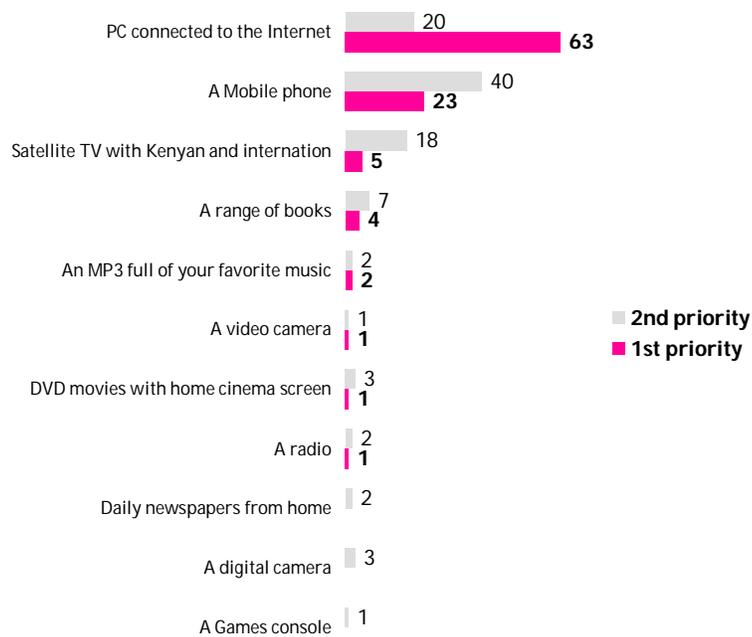
We asked internet users to rate on a scale of 1 to 10 the extent to which not having internet would impact their life, 1 being it would not impact at all and 10 meaning it would impact hugely.



A majority of internet users feel that lack of internet would impact hugely on their life. When asked the question to what extent not having internet would impact their lives, over half felt it would impact very strongly. This is a clear indication that majority of the internet users depend on it in many aspects of their lives.

Figure 7: Imagine you were being sent to a desert island and you could choose to have access to items from the following list, what would you choose?

Base: 1669 internet users



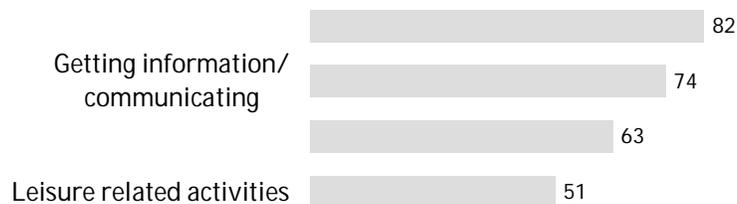
Given the importance of internet in the lives of users, it is not surprising that asked the question on what they would bring to a desert island, a majority preferred to have a personal computer connected to the internet as their first priority. This was followed at a distance by the mobile phone.

Figure 8: Imagine you were being sent to a desert island and you could choose to have access to items from the following list, what would you choose? By Age
Base: 1669 internet users

What item would you bring to a desert island? (1 st priority)	BASE: Total Sample	Age				
		18-24 yrs	25-34 yrs	35-44 yrs	45-54 yrs	55+ yrs
BASE: Total Sample	1669	169	947	422	112	19
PC connected to the Internet	63	62	61	66	70	62
A Mobile phone	23	18	24	22	20	18
Satellite TV with Kenyan and international channels	5	11	4	4	6	4
A range of books	4	3	4	3	3	16
An MP3 full of your favorite music	2	2	3	0	-	-
A radio	1	-	1	1	-	-
DVD movies with home cinema screen	1	1	1	1	-	-
A video camera	1	1	0	1	1	-

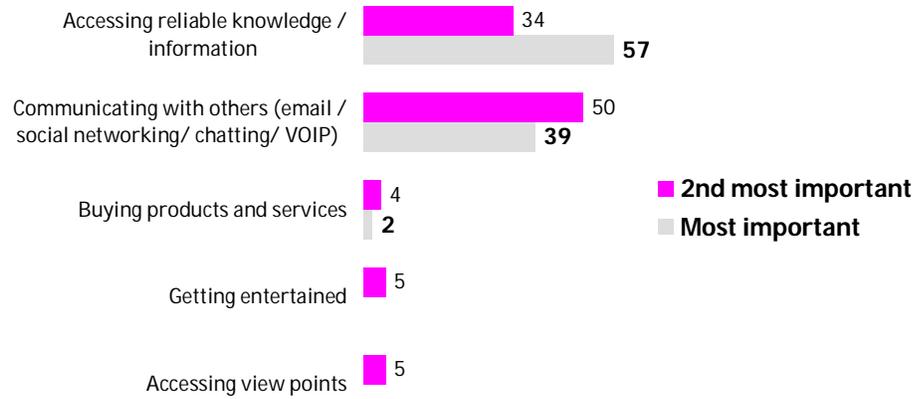
The internet is relatively more important to users aged 45 to 54 years compared to internet users in other age groups. On the other hand, the mobile phone has slightly more importance to the 25 to 34 year age group compared to the other age groups.

Figure 9: Which one of the following spheres of life motivates you to use the internet
Base: 1669 internet users



Work related activities including job search is the most widely mentioned motivation for using the internet usage. This is followed by the search for information and communicating with others. Information for academic purposes or education is ranked third followed by internet use for leisure which is ranked fourth as a motivation.

Figure 10: Which of these are important to you when it comes to internet usage
Base: 1669 internet users



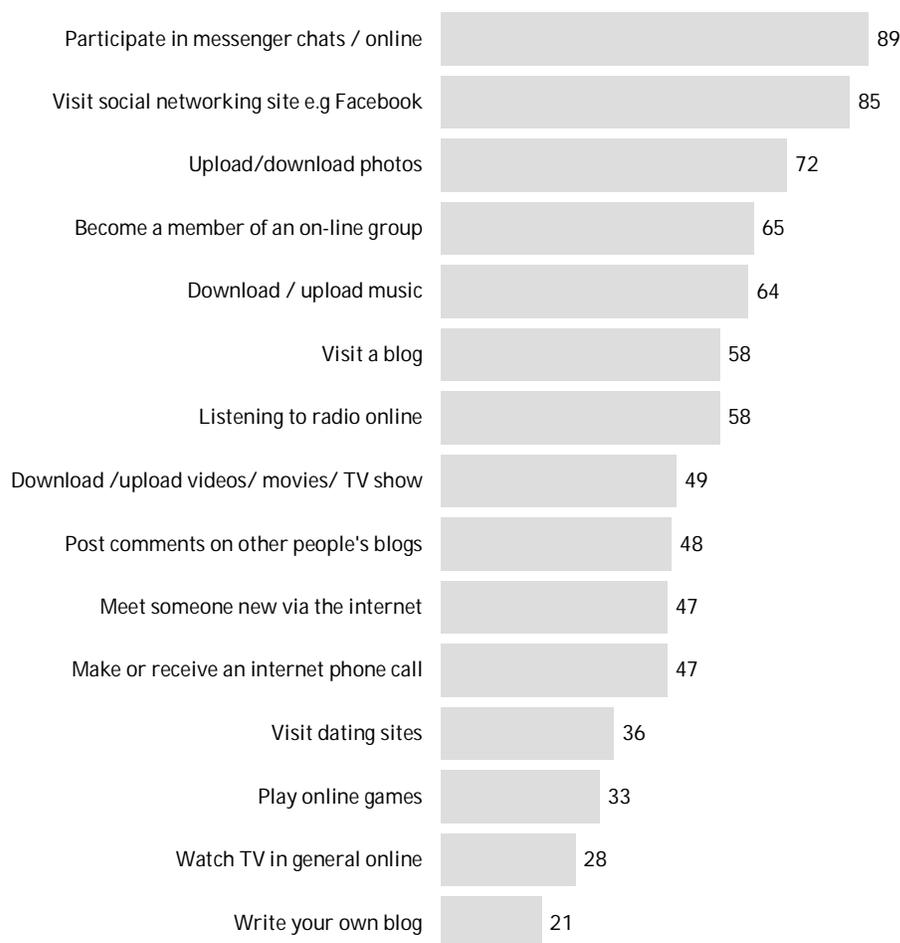
Getting reliable information is the most important consideration when using internet. Communicating with others ranks second in importance whereas buying products and services or getting entertained rank third and fourth respectively.

Social Life and Engagement

This section of the document explores how internet users in Kenya use the resource for leisure and to get connected in their social online communities.

Figure 11: Have you ever done any of these activities online?

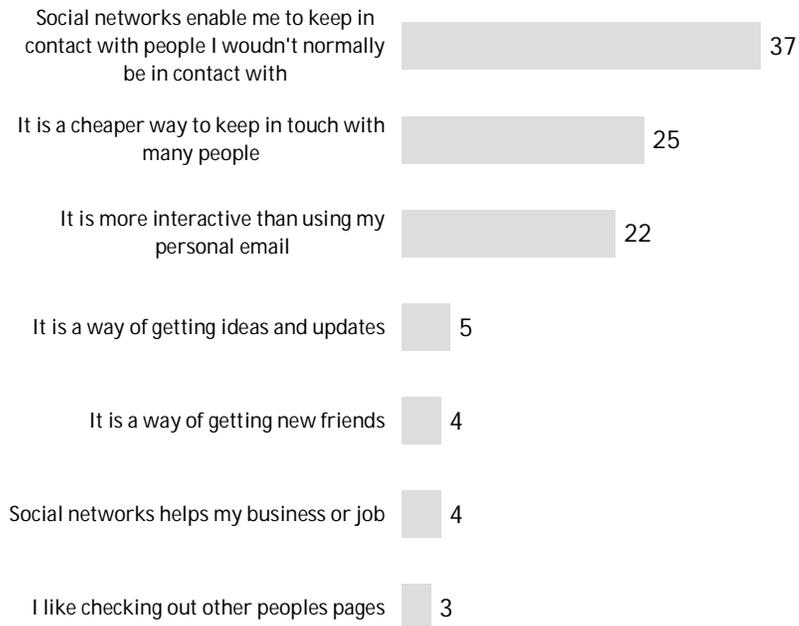
Base: 1669 internet users



In the arena of social interaction, using instant messaging or chatting online is the most common activity, done by a huge 89% of the respondents. Visiting social networking sites is almost as common. About seven in every ten internet users interviewed have uploaded photos whereas an almost equal proportion have watched video streaming or downloaded or uploaded music. Sixty five percent of those interviewed have become a member of an online group whereas 58% have listened to online radio.

Blogging appears to be less popular than social networking as 58% of the respondents in total have visited a blog, including 48% who have posted comments on other people's blogs and 21% who have written their own blog.

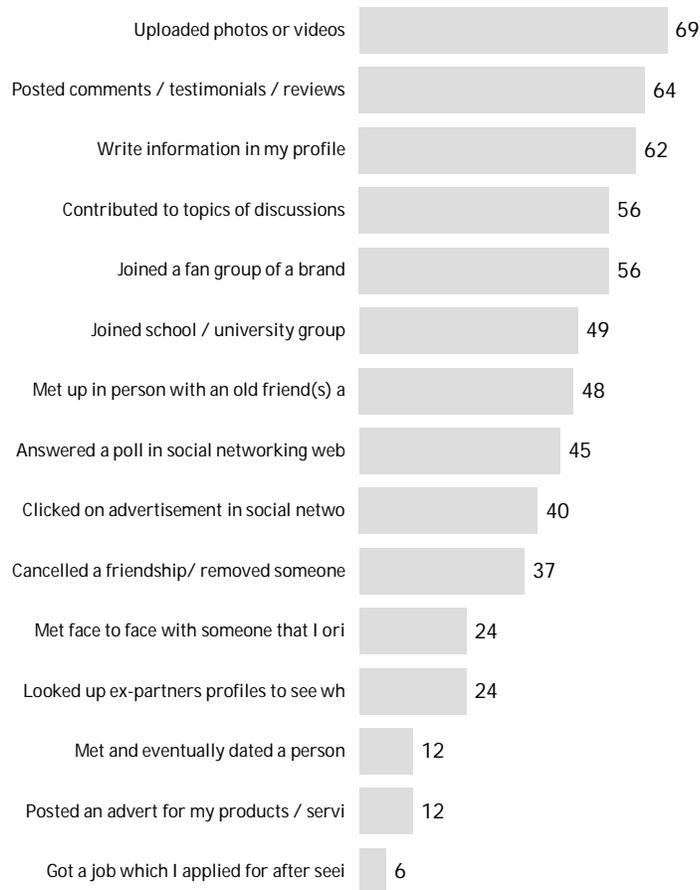
Figure 12: What are your main reasons for visiting social networking sites?
Base: 1421 internet users who have visited a social networking site



Keeping in contact especially with people that would be difficult to be in touch with is the main drive for using social networking sites for 37% of the respondents. Keeping in touch with many people is the main reason 25% of the target group use social networking sites while a further 22% are driven by the interactive nature of communicating when compared to using email.

Using social networking sites as a way of getting ideas and updates or as a way to get new friends is a motivating factor for only a few who visit these sites.

Figure 13: What activities have you ever done in a social networking site?
 Base: 1421 internet users who have visited a social networking site

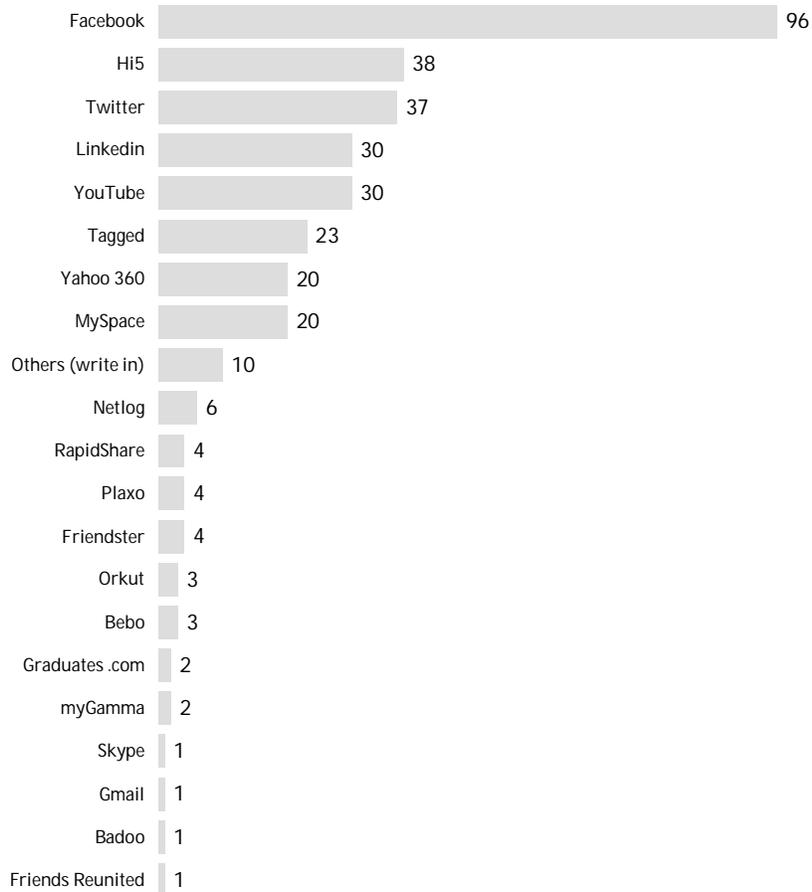


The most common activities done in a social networking site are uploading photos or videos (69%), posting comments (64%) or updating status information (62%).

In relation to brands and advertising, 56% have joined a fan group of a brand whereas 40% have clicked on an advertisement. A smaller proportion (12%) have advertised their products or services online through a social networking site.

The internet is not only a resource to keep people who know each other in constant contact, it also brings new people together. Nearly half of the internet users (48%) have met up in person with an old friend and 24% have met face-to-face with a person they originally met online.

Figure 14: which social networking sites are you signed up to?
Base: 1421 internet users who have visited a social networking site



Facebook is the dominant social networking site used by Kenyans. Less than half of this group has joined Hi5 whereas a similar proportion (37%) are on Twitter. About three in every ten social networkers use You Tube whereas a similar proportion have joined the professional social networking site, LinkedIn.

Table 4: How frequently do you visit your favourite social networking sites?

Base: 1421 internet users who have visited a social networking site

How frequently do you visit your social networking site?	Social networking site visited								
	Those who visit online social networking sites	Face book	Hi5	Twitter	You Tube	Linkedi n	Tagged	MySpace	Yahoo! 360
Base	1421	1364	566	558	435	386	348	326	270
More than 5 times a day	25%	26	33	34	36	26	34	40	34
2-5 times a day	19%	19	20	22	20	18	25	21	19
At least once a day	29%	30	29	26	25	30	25	23	30
2-3 times a day	4%	4	4	4	3	4	3	6	4
At least once a week	15%	15	10	10	11	16	9	9	9
2-3 times a month	2%	2	1	2	2	2	1	1	1
At least once a month	3%	2	1	1	1	2	-	1	1
Less often than once a month	3%	2	2	1	1	3	1	-	2

A quarter of online social networkers who visit Hi5, Twitter, You Tube, Tagged, Myspace, and Yahoo! 360 visit these social networking sites more than five times a day.

Table 5: How many contacts do you have in your favourite online social networking

Base: 1421 internet users who have visited a social networking site

How many contacts do you have in your favourite online social networking site?	Favourite social networking site visited						
	Those who visit online social networking sites	Face book	Yahoo ! 360	You Tube	Twitter	Linked in	Tagged
Base	1421	1111	20	32	33	55	14
Less than 10	7	3	18	24	8	16	21
11 to 20	9	8	7	9	11	14	10
21 to 40	10	9	17	9	11	29	10
41 to 60	7	7	10	-	-	12	25
61 to 100	13	14	10	9	12	4	15
101 to 250	23	26	26	16	17	22	15
More than 250	26	31	11	18	41	1	5
Don't know	4	2	-	15	-	3	-

A majority of Facebook and Twitter users have over 100 contacts on their favourite, including 31% of Facebook users who have more than 250 contacts!

Table 6: Members of the favourite online social network

Base: 1421 internet users who have visited a social networking site

Which of these groups is part of your network in your favourite online social network?	Favourite Social networking site visited						
	Those who visit online social networking sites	Face book	Yahoo ! 360	You Tube	Twitter	Linked in	Tagged
	1421	1111	20	32	33	55	14
Work colleagues	52	54	57	38	36	39	15
Business contacts in the country	27	27	43	13	33	56	20
Business contacts outside the country	21	18	36	24	29	65	20
Friends/family living in the country	76	82	86	50	53	36	56
Friends/family living outside the country	66	71	28	70	48	35	39
Online contacts who I have not met in person	40	42	31	26	60	18	90

What is very interesting is the proportion of those visiting social networking sites who have friends or family living outside the country as members of their social network. Kenyans clearly use the digital space to link up with loved ones abroad. About half of the online social networkers have work colleagues as members of the contacts. On the domestic front, this is especially so for Yahoo! 360 while on LinkedIn users are more likely to have business contacts outside of Kenya as part of their social network.

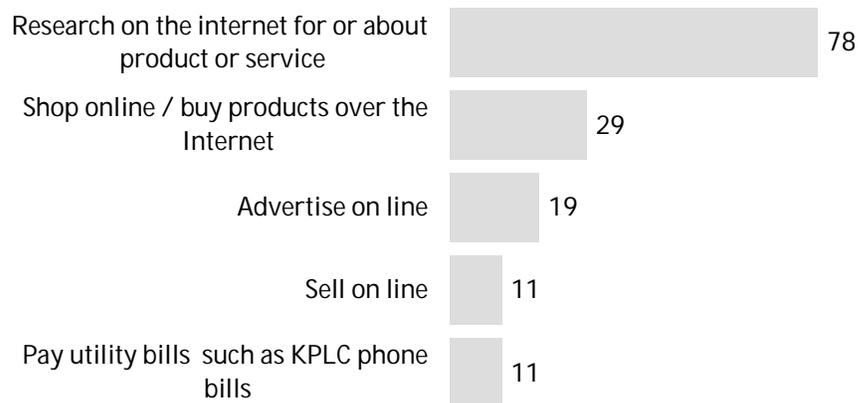
Significant proportions of respondents have on-line contacts that they have never met in person, hence the social networking sites are expanding social networks.

Buying and Selling

This section explores the online purchase behavior. We try to uncover who buys online, who researches for products online. Here, we also try to understand how online buyers gather information before they can make a purchase. Finally we explore the barriers in online purchases.

Figure 15: Have you ever done any of these activities online?

Base: 1669 internet users



A large majority of the internet users have researched online for a product or a service. The proportion of those who have bought products online (29%) is higher than those who have advertised (19%) or even sold online (11%). A relatively low proportion (11%) have paid their utility bills online such as electricity.

Figure 16: When you are searching for products / services on the internet, what are you typically looking for?

Base: 514 internet users who have visited a social networking site

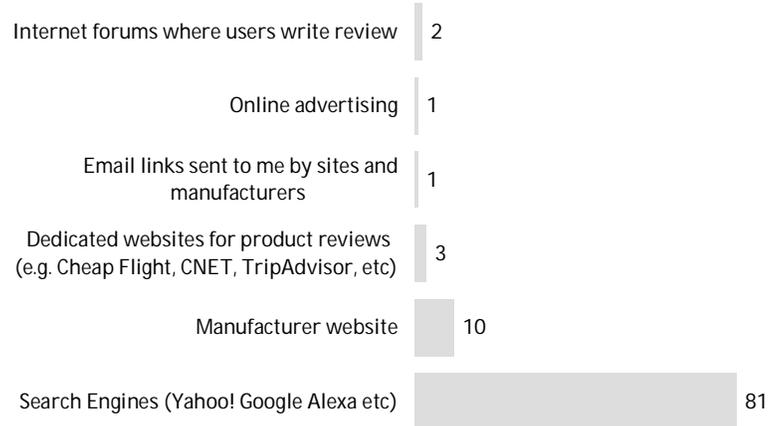


When internet users are searching for products and services online, they have varying motivations behind this. A majority of them (88%) are interested in the details of the products or service specification. A significant proportion (72%) want to compare prices in order to get the best bargain whereas 63% want to make comparisons between different products.

This means that sites for products, brands and services need to include as much details to meet the needs of the online consumer. Up-to-date prices are quite important as this is this drives more than seven out of every online shoppers.

Figure 17: When you search for information online about products / services, where do you most often start your search?

Base: 514 internet users who have visited a social networking site

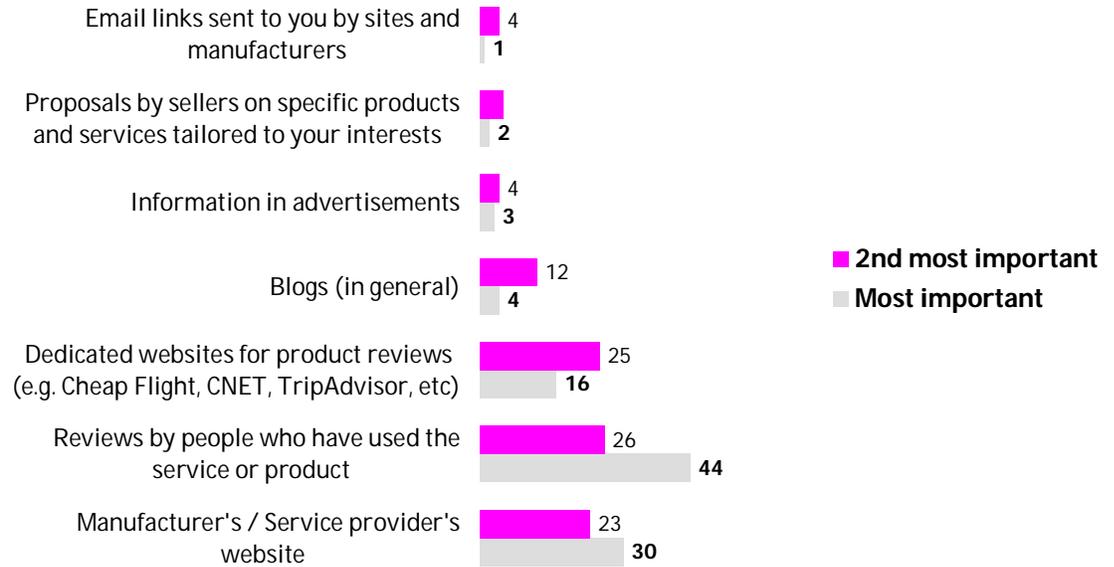


The search for information about a product or a service usually starts with the search engines. Only about a tenth start off with the manufacturers website whereas 3% will go to dedicated websites for product reviews. This means that manufacturers and service providers' websites must be easily found by the search engines.

We asked respondents whether they know the exact product or service they need they start the search. Despite starting their searches from the search engines, a majority of the online shoppers (63%) already know the exact product they want to search for.

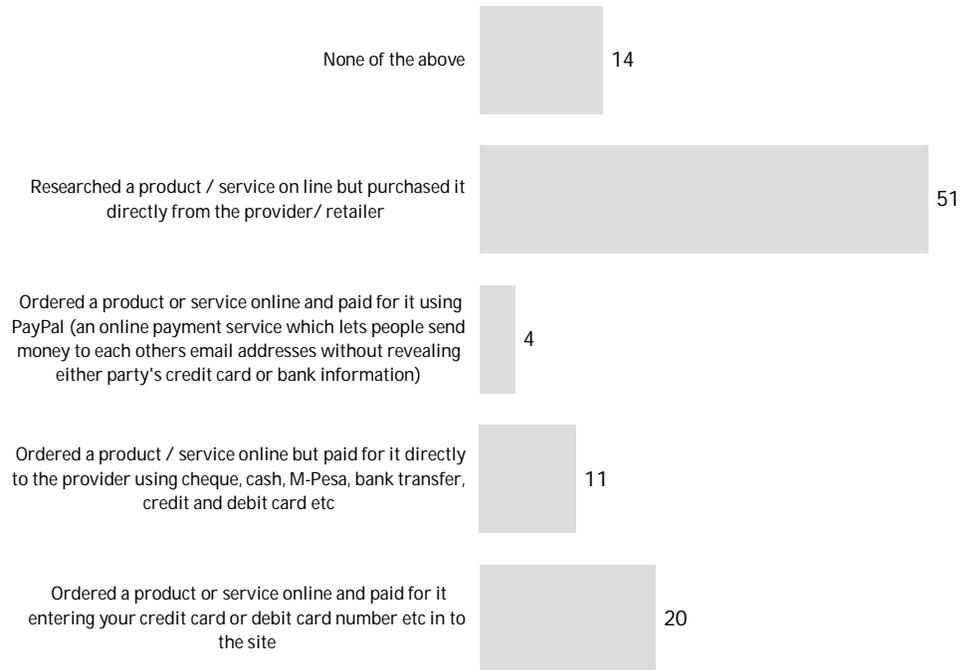
Figure 18: When it comes to product / service reviews on the internet, which one source is most believable?

Base: 514 internet users who have visited a social networking site



There are two credible sources of information for Kenyan internet users when it comes to products or services: the manufacturer's website and reviews by consumers who have used the service or product. Dedicated websites for product reviews are rated third in terms of credibility and are an important secondary source of information. This compares with research done in xxx where xxx

Figure 19: Which of the following have you ever done?
 Base: 514 internet users who have visited a social networking site



About half of Kenyan internet users who research on a product or service have purchased it directly from the provider or retailer. A fifth of them have ordered for a product online and paid for it using a credit card or debit card number through the site. This latter finding would be higher in markets where there is more opportunity to make local purchases through credit card on-line. There is a small proportion of users (11%) who order the product on-line but pay for it using conventional means, including mobile money transfer.

Figure 20: After researching on the internet, what makes you not buy a a product / service online over the internet

Base: 514 internet users who have visited a social networking site



Most of the hesitancy relating to buying a product online is linked to delivery costs for the product to Kenya. Equally significant is the lack of means for online payment such as a credit card. At least a fifth (21%) of the respondents think it is not secure to buy products or services online, probably fearing credit card fraud

We asked respondents to the survey if they would like to buy products on line and pay via money transfer like M-Pesa or Zap, and a majority, 88% agreed that they would. Thus there is a lot of opportunity for website owners to make this a possibility.

Table 7: a. Which of the following products/ services have you ever bought/ ordered/ registered for over the internet?

b. Which of the following products/ services would you like to be able to buy/ order/ register for over the internet?

Base: 1669 internet users

Online services	a. Ever used	b. Would like to use
	%	%
Payment of bills	16	51
Online Banking	19	39
On line courses	28	33
Purchase of computers (laptop desktop)	14	31
Purchase of mobile gadgets (mobile phone PDA MP3)	11	31
Purchase of tickets for cinema / theatre / concerts	4	31
Purchase of home appliances	3	32
Paying for Music / Movie downloads	18	28
Purchase of books	24	28
Booking of Hotels / Restaurants	23	26
Automotive purchases (cars motorcycles)	10	22
Purchase of airline tickets	31	23
Software downloads	30	23
Audio visual (TV radio Hi Fi etc.)	3	21
Cosmetics: skin care/ hair care products	6	16
Dating sites	13	4

There is a lot of potential for providing some of these e-commerce activities to Kenyan digital users.

Purchase of airline tickets is among the most common payable online services for internet users. Software downloads is the next most widely used. There are, however, many services that have very low usage but high demand. For example, half of internet users would like to pay their bills on-line whereas only 16% had ever used this service.

Similarly, the proportion of respondents who have used online banking (19%) is quite low compared to those who would like to access the service. There is also a significant need for purchase of computers and mobile gadgets online.

Knowledge

We have seen that seeking information is a key driver to internet use. It is therefore important to know what Kenyan internet users think of the local content available.

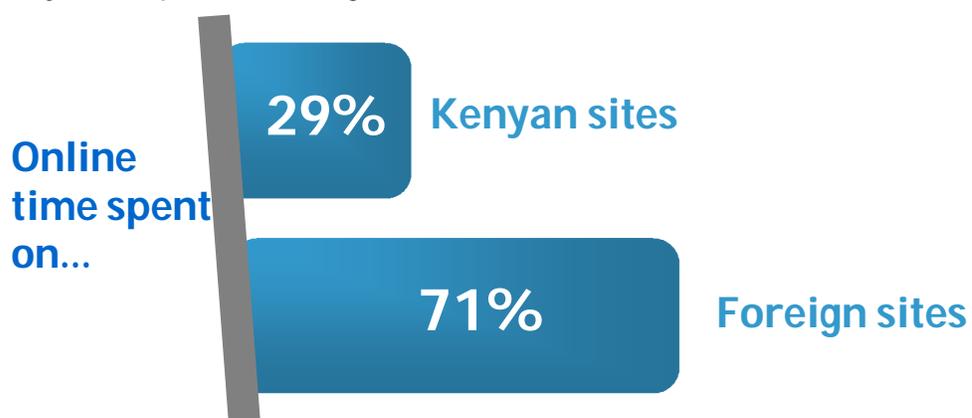
Table 8: Do you feel there are enough Kenyan-based internet sites available at the moment?

Base: 1669 internet users

Are there enough Kenyan-based sites available at the moment?	BASE: Total Sample	Age				
		18-24 yrs	25-34 yrs	35-44 yrs	45-54 yrs	55+ yrs
BASE: Total Sample	1669	169	947	422	112	19
Yes	11	12	10	10	22	32
No	89	88	90	90	78	68

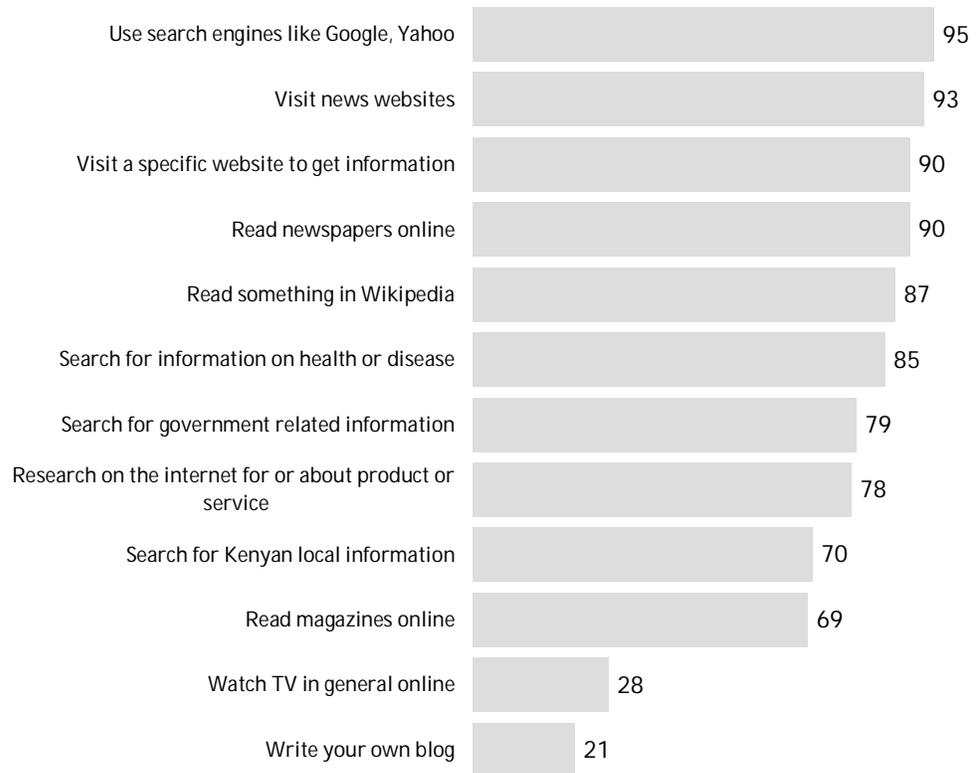
We asked respondents whether they felt there are enough Kenyan based internet sites available at the moment, a majority of respondents (89%) are of the opinion that there are not enough. However, internet users above the age of 45 years are more likely to think there are enough Kenyan-base internet sites.

Figure 6: How would you estimate the proportion of your online time spent on Kenyan compared to foreign sites?



On average, Kenyan internet users spend 72% of their online time on foreign sites and very little time on Kenyan sites. The next section of this report explores some of the online content that could be developed locally to meet the needs of internet users in Kenya.

Figure 21: Which of the following have you ever done on the internet?
Base: 1669 internet users



The most common online sources of information and knowledge are search engines online newspapers visiting specific websites and the ubiquitous Wikipedia. The trend amongst internet users is one of consuming information rather than producing information. Looking at the proportion of internet users who have written their own blogs (21%), it can be concluded that the market is yet to shift to the information producing side of the scale, especially given the lack of Kenyan website content

Table 9: a. Which of the following have you ever accessed information on?

b. Which of the following would you like to access information on?

Base: 1669 internet users

Information areas	Ever accessed	Would like to access
	(%)	(%)
Educational material	76	61
Online courses	55	54
Information on training institutions	63	51
Diagnosis of a disease from symptoms that you or others you know are suffering	54	47
General background or information on a disease	52	45
Tourism	45	41
Information on what drugs to take for a particular disease	34	40
Checking up on the diagnosis that you have been given by a health care professional	33	38
Price of healthcare products	14	38
HIV / AIDS	40	38
Reproductive health - (pregnancy and childbirth)	40	36
Agricultural information	20	27
Weather	26	24

One of the most important needs is information on educational materials and online courses. There is already a wide availability of these but apparently, the opportunity is still high.

Equally important is diagnosis information on a disease from symptoms that one may be suffering from.

Educational institutions could cease the opportunity to provide more educational services and information online. As health is an important preoccupation on people's minds, information on different conditions and diseases has huge potential if provided on local websites.

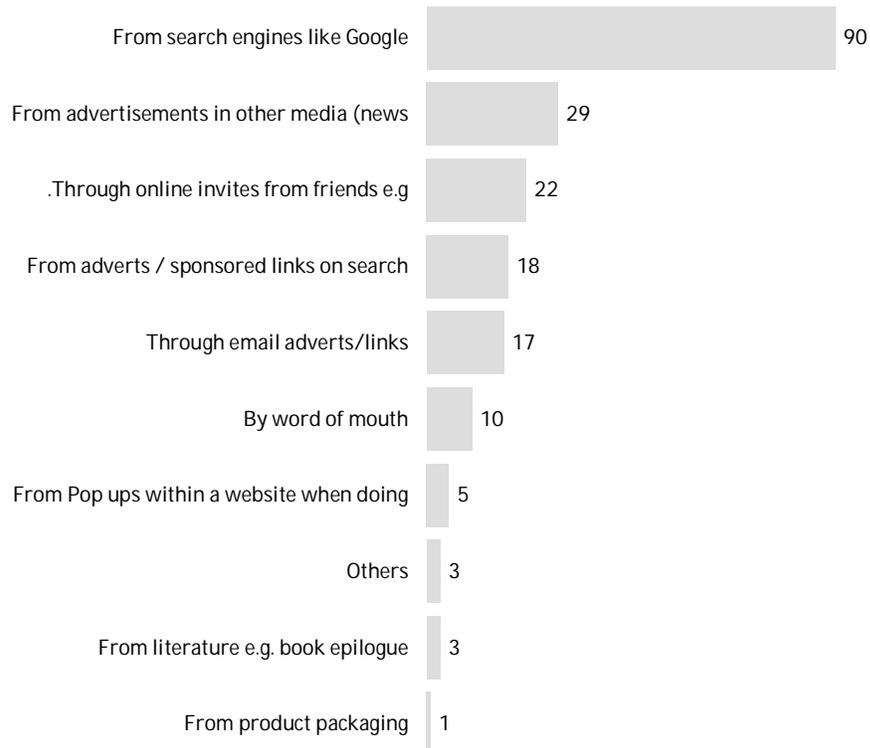
Credibility of local content to be developed has to be high. We asked respondents whether they always trust information they get from the internet. A majority (60%) reported they do not always trust the information from the internet. Given this consideration, it is important that information provided is credible and thorough so that it can be of benefit to online information seekers in Kenya.

We also asked the respondents whether they always find the information they set out to look for on the internet. A significant proportion of on-line users (39%) do not find the information they set out to look for on the internet. This is a call for online information providers to publicize their websites so that users can easily access them whenever they need information.

Marketing

Figure 22: Which of the following ways have most often made you aware of an internet site that you have visited?

Base: 1669 internet users



One of the most effective ways of making internet users aware of websites is through a search engine like Google. About 90% have become aware of websites through these.

Figure 23: Do you remember having seen any advertisement for products, services or brands online?



A majority of the internet users recall having seen an advertisement for products, services or brands online.

We asked these respondents who recall having seen an advertisement online whether they have ever made a decision based on an advert that they saw. A significant proportion of 45% have been influenced by the advertisement they saw online.

Table 10: Which one manufacturer / provider website did you most like?

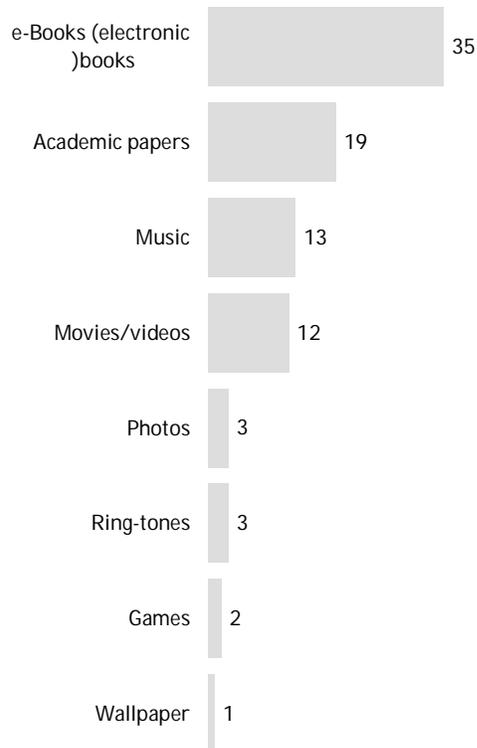
Base: 1466 Internet users who visited the official website of a manufacturer or provider

Top 20 websites	
1.	Nokia
2.	Safaricom
3.	HP Compaq
4.	Dell
5.	Samsung
6.	Sony
7.	Kenya airways
8.	Toyota
9.	Apple
10.	Microsoft
11.	Nation Media Group
12.	Hewlet packard
13.	Sony Ericsson
14.	Google
15.	Zain
16.	Toshiba
17.	LG
18.	East African Breweries Limited (EABL)
19.	Amazon.com
20.	Orange/Telkom

Nokia is top of mind of internet users who have visited an official website of a manufacture or provider. On the local scene, Safaricom appears in top position followed by Kenya Airways website while Nation Media Group website comes a distant third.

Figure 24: Which one of the following are you most interested I down-loading from the internet?

Base: 1669 internet users



There is a lot of interest to download electronic books from the internet among internet users. Academic papers comes in a distant second while 13% of the internet users are interested in downloading music. A similar proportion (12%) are interested in downloading movies from the internet.

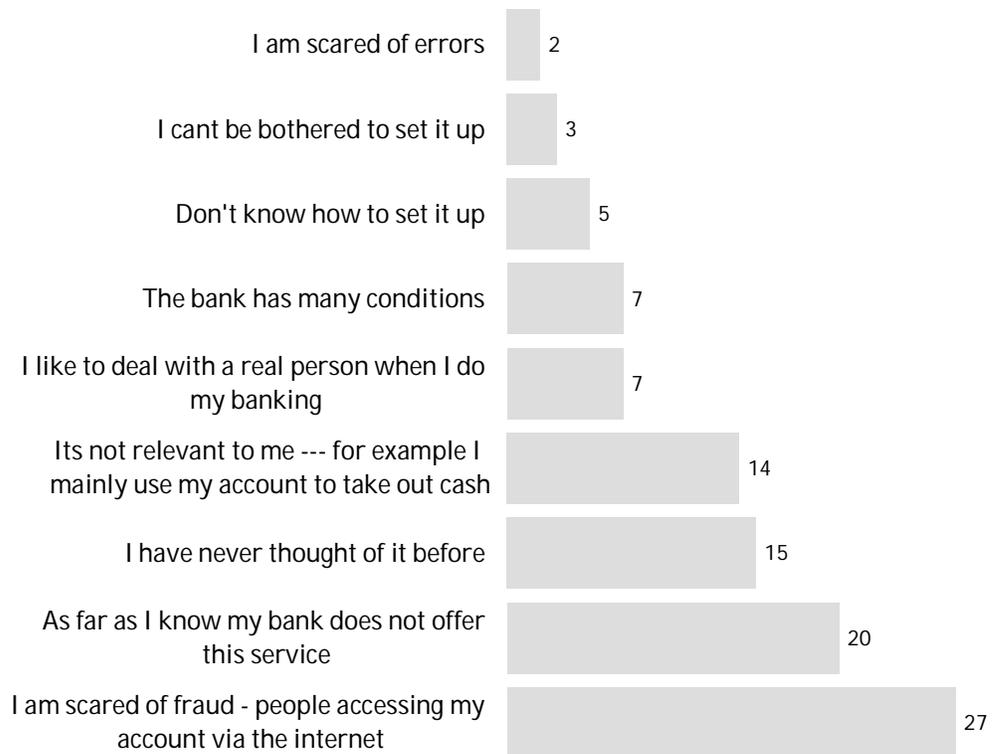
Financial Services

Figure 25: Are you currently doing your banking on the internet?

Are you currently doing your banking on the internet?	BASE: Total Sample	Age				
		18-24 yrs	25-34 yrs	35-44 yrs	45-54 yrs	55+ yrs
BASE: Total Sample	1669	169	947	422	112	19
Yes	25	8	22	37	31	38
No	75	84	77	63	69	62

According to the study, 25% of internet users are using internet banking. This proportion is skewed mainly towards internet users who are aged 35 years and above.

Figure 26: Why do you not do your banking over the internet?
Base: 1669 internet users



The main barriers to internet banking is that internet users are not certain about the security of their accounts. In addition, about a fifth of the internet users feel that the service is not available at their bank.

GoK and Social Services

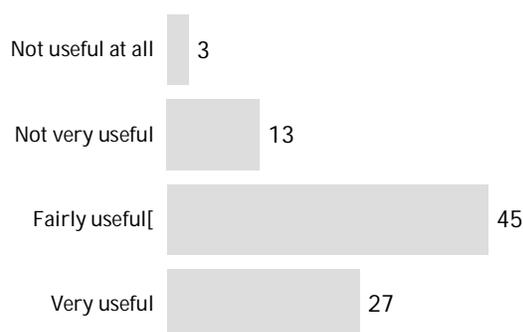
A majority of internet users (80%) have searched for government related information online. This highlights the demand for available information from government. However, this information is not always enough. This section looks at where internet users frequent most often to look for information and what their needs are with regard to government information and services.

A significant majority (88%) of internet users have visited a Government of Kenya or Para-statal website.

The top 20 recently visited Government of Kenya and Para-statal websites are as below.

Kenya revenue authority	26
Public service commission	11
Kenya National Examination Council	7
Higher Education Loans Board	6
Central bank of Kenya	6
Department of immigration Kenya	5
Kenya wildlife service website	4
The Kenya ICT Board Site	4
www.information.go.ke	4
e-Government	2
Electoral commission of Kenya	2
Kenya bureau of standards	2
Official website of state house	1
Anti-corruption whistleblowing	1
Kenya network information centre	1
National assembly	1
Judiciary website	1
Central Bureau of Statistics	1

Figure 27: How useful was the Government of Kenya of Para-statal website you visited most recently.



A large majority of internet users find information in government websites useful.

Figure 28: Which one of the following information/ services from government would you like to use via the internet?

Status of ID / Passport application	69
Submission of income tax returns	65
Legal information/legal regulations/ provisions	56
Development projects being funded (e.g. CDF) / how money is spent / budgetary information	54
Exam results and candidate selection	54
Public service and Para-statal jobs	52
Report corruption cases	50
Constitution review process and copies of drafts	49
Government performance contracts (what each Government Body is supposed to do)	47
Population information (following the recent population census)	46
Health information	45
Customs and excise services	43
HELB loan repayment status	43
Disease outbreaks	42
Parliamentary proceedings	36
Roads construction projects (program for construction)	34
How and where to access agricultural information	29

Most importantly is the type of online service internet users would like to get from government. Identification card and passport application services are top on the list of priorities for internet users. A majority (65%) would also like to submit their tax returns online whereas more than half (54%) would like to monitor development projects online.