THE EVOLVING ONLINE ECOSYSTEM IN AFRICA AND HOW IT IS IMPACTING SHOPPING BEHAVIOUR

IS E-TAIL THERAPY THE NEW RETAIL THERAPY?
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ABSTRACT

These are times of rapid innovation and change in the Africa region. Improvements in health, nutrition, and diplomacy have nearly doubled life expectancies over the past century. Technological innovation and competition have made it possible for millions of consumers in the region to hold in one hand a mobile device with more computing power than the last U.S space shuttle. The improving lives of consumers continue to create numerous opportunities for retailers in Africa who in turn offer new and better shopping experiences in their stores and on their websites.

All these changes are powerful and significant, but the pace of change in digital connectivity is faster than any other universal phenomenon in Africa. As much as the first mobile revolution- feature phones – allowed Africa to leapfrog landlines, the second mobile revolution – smartphones – will allow Africa consumers to leapfrog the separate brick and mortar and traditional e-commerce retail experiences and move directly into a digital connected shopping across channels.

This paper identifies the factors that are catapulting e-commerce in Africa and more importantly looking at the impact it's having on consumers purchase behaviour. Key factors that are fueling a need for connected shopper experience are access to mobile phones, access to internet and convenience. Innovators in electronic payment (M-Pesa in Kenya) and e-commerce (Jumia in Kenya and Nigeria, OLX in Kenya) have also gained considerable market share and driving a digital shopper experience.

INTRODUCTION

Shoppers today no longer simply go to the nearest store; they grab the nearest digital device. The online retail ecosystem is fast evolving. Online retail sales will more than double between 2015 and 2019 and account for more than 12% of global sales by 2019[1]. Retail therapy is giving way to e-tail therapy.

And it's not just purchasing habits that are going digital: The whole retail experience is changing. Today's shoppers are incorporating digital touch points along the entire path to purchase, from reviewing products online at home to using smartphones as personal shopping assistants in the store. In fact, some countries, such as china, consumers are using mobile devices to purchase selected categories at high rates. Omni channel shoppers seamlessly switch between on and offline channels with ease.

"Consumers interact with brands across both digital and physical channels, and increasingly, they don't make a distinction between the two. Omni-channel is the new reality, and retailers need to think differently. Traditional notion of "trip", "shopping experience" and "fulfillment and delivery" have been redefined. Today's winning brands use a combination of on and offline strategies to not only help consumers make more informed decisions, but also add value throughout the entire shopping experience – wherever and whenever that happens to be"[2]

As technology adoption and infrastructure improvements bring more consumers online and familiarity and comfort with digital platforms increase, the continued growth of connected commerce is inevitable. But today there is much uncertainty about the convergence between online and offline shopping behavior and how to drive margin and profitability in both.

More than half the world's people are already connected to the digital universe, whether on computers or mobile devices. Connectivity is now an integral part of life without which they would struggle. Even recently connected consumers in Africa tell us that without connectivity, they would "feel naked"; "life would be paralyzed" or "like a crime". But many of these connected consumers are not yet connected shoppers in the sense of purchasing goods in the digital space. E-commerce – define as shopping and buying on a personal computer outside a store – is growing in Africa, but worth noting is that it remains a small portion of total retail.

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[1] Digital Analytic Firm, eMarketer, 2016
[2] Patrick Dodd, President, Nielsen global retailer vertical, 2015

THE DRIVERS AND BARRIERS OF E-COMMERCE IN KENYA

DRIVERS

Information and communication technologies keep evolving leading to easier and more affordable ways of transferring information and conduction business in Kenya.

Worth noting though is that Kenya, as an emerging economy and regional leader used to lag behind in having a legal framework for e-commerce in place despite the huge strides. The Kenyan private sectors strongly support e-commerce legislation, as well as legislation of the information and communication technology sector that guarantees an open market and promote innovation;

Over the last decade, the performance of the information and communication (ICT) sector has been robust resulting in it being major driver of economic growth. Kenya has managed to keep in tandem with the rapidly evolving technology and is a leading country in mobile transfer system. The rapid expansion of the ICT sector continued in 2014 as reflected by improvement of key indicators. Internet usage has improved exponentially especially after the laying of the undersea fiber optic cables along Kenyan Coast.

In 2014, value of ICT output increased by 12.7 percent to Kshs 262.3 Million. During the same period, mobile telephone subscriptions rose by 7.4 percent to stand at 33.6 million. Mobile penetration rose from 74.9 percent in 2013 to 78.3 percent in 2014 while the internet subscriptions increased by 6.7 percentage points to 38.3 percent in 2014.

Table 15.2: Fixed and Mobile network Services, 2010-2014

Fixed Telephony	2010	2011	2012	2013[+]	2014*
Wireline Capacity ('000)… … … … … … … … … … … ..	422	401	380	408	363
Total Connections ('000)… … … … … … … … … … … ..	461	380	263	206	180
Wireline Connections … … … … … … … … … … …	235	188	75	57	48
Wireless Connections[1] … … … … … … … … … … ..	226	192	188	149	132
Mobile Telephony					
Mobile Telephone Capacity ('000)[2]… … … … … … …	46,629	47,677	49,977	55,077	65,077
Connections ('000)… … … … … … … … … … … … … …	24,969	26,981	30,433	31,309	33,633
Mobile Money Transfer Agents … … … … … … … …	32,949	42,313	49,079	93,689	121,924
Mobile Money Transfer Service Subscribers ('000)…	10,615	17,396	19,319	26,016	26,023
Total Deposits through Agents in KSh Billion [+]	391	566	811	1,033	1,269
Total Transfers, in KSh Billion … … … … … … … … ..	732	1,169	1,544	1,902	2,372

Source: Communication Authority of Kenya

* Provisional

[+] Revised

[1] Includes Local Loop Operators

Source: Kenya National Bureau of Statistics, 2015 Economic Survey

Mobile Network Services, The mobile telephone capacity, connections and mobile money transfers services continued to expand during the review period. Mobile telephone capacity grew by 18.2 percent from 55 million in 2013 to 65 million in 2014. Mobile telephone connections rose by 7.4 percent to reach 33.6 million in 2014 while the number of mobile money transfers agents increased by 30.1 percent during the same period

Based on African Mobile Trends white paper, mobile subscriptions across Africa will reach an exceptional 50% by 2020, with acute gaps between countries Sub Saharan Africa actually became the third biggest regions in terms of mobile phone subscriptions, now accounting for 10% of the global subscriber base. Nigeria (7th), Egypt (11th), South Africa (14th), Kenya (30th) are ranked in the top 30 of the countries in the world for the number of mobile subscriptions
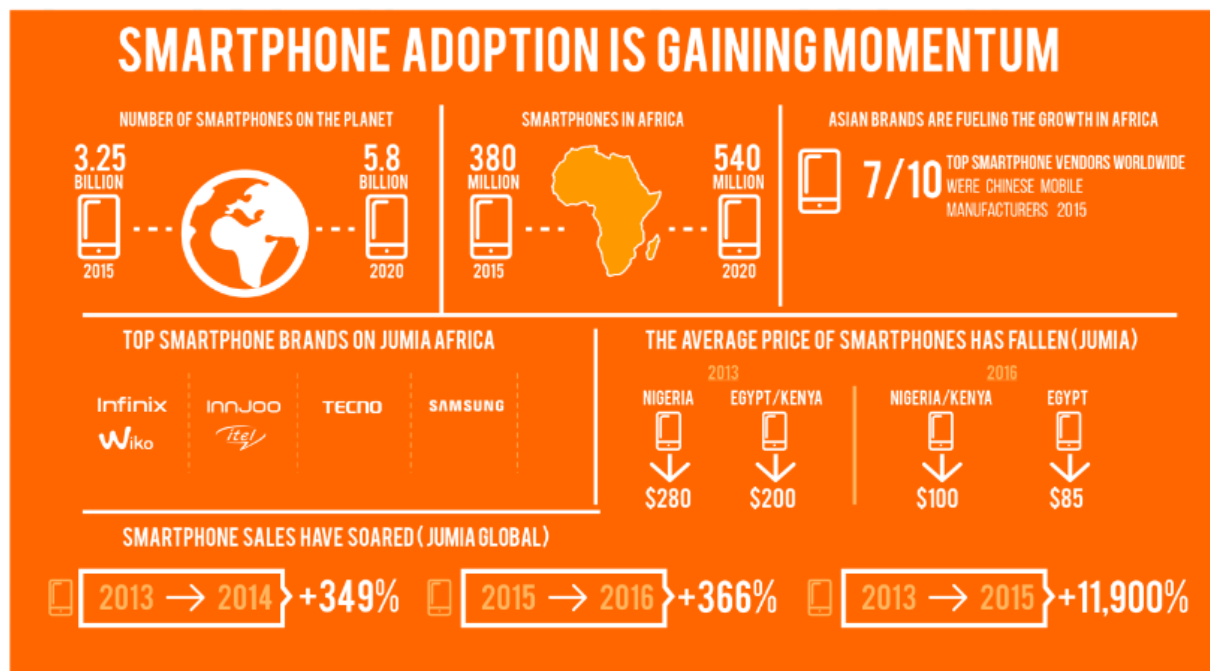
Source: African mobile trends white papers, jumia Kenya, 2016

According to intermedia report on "The impact of Digital Technology and Social Media on young People in Kenya "Low cost and second-hand handsets along with affordable pre-paid airtime tariffs have led to explosive growth in mobile money subscriptions, even among the poor. These numbers have contributed to a significant number of connected Kenyans.

UNIQUE MOBILE SUBSCRIBER PENETRATION IN KENYA

2007	2008	2009	2010	2011	2012
18%	22%	24%	28%	29%	31%

Source: GSMA Intelligence
Note: Represents unique users that subscribe to mobile services, as opposed to the
number of registered Subscriber Identification Module (SIM) cards on mobile networks.

Source: Intermedia Report: The impact of Digital Technology and Social Media on young People in Kenya, 2014

Estimated *internet users* in Kenya expanded by 23.0 percent to stand at 26.2 million users as presented in the table above. This was highly due to the reduction in data bundles prices and availability of affordable internet enabled telephones. The total wireless and fixed (wired) internet subscriptions also increased by 24.8 percent and 20.5 percent respectively in 2015.

**Table 15.5: Internet Providers, Users and Subscriptions, 2010 - 2014**

					Number
	2010	**2011**	**2012**	**2013**	**2014***
Licensed Internet Services Providers (ISPs)… … … … … ….	57	90	165	171	185
Estimated internet users… … … … … … … … … … … … …	4,772,446	11,334,694	13,541,868	21,273,738	26,163,560
Total Wireless Internet Subscriptions… … … … … ….	**3,082,993**	**6,104,019**	**8,458,818**	**13,107,459**	**16,357,239**
Terrestrial mobile data… … … … … … … … … ….	3,059,906	6,076,444	8,436,578	13,090,348	16,338,990
Terrestrial wireless data… … … … … … … … … …	22,134	26,615	21,709	16,429	17,537
Satellite data… … … … … … … … … … … … …	953	960	531	682	712
Total Fixed (Wired) Internet Subscriptions… … … … … …	**13,959**	**48,961**	**48,351**	**79,509**	**95,780**
Fixed Digital Subscriber Line (DSL) data… … … … … … ….	9,631	11,422	10,098	12,014	14,512
Fixed Fibre Optic data… … … … … … … … … … … ….	4,303	37,514	38,228	67,470	81,243
Fixed Cable Modem (Dial Up) data… … … … … … … … ….	25	25	25	25	25
Total Fixed and Wireless Internet Subscriptions… … … … ….	**3,096,952**	**6,152,980**	**8,507,169**	**13,186,968**	**16,453,019**

Source: Communication Authority of Kenya

* Provisional

Source: Kenya National Bureau of Statistics, 2015 Economic Survey

Mobile devices are increasingly being used across the world to go on the Internet and connect: 63% of searches on Google are made on phones globally and according to Ofcom Adults' Media Use and Attitudes Report (2015), 61% of adults prefer to go online on their mobile. The number of internet/data users in Kenya has also grown by double digits to stand at 35.5 million which in turn means 83 percent of the total population is online. Notably, personal connectivity via mobile devices maintain lead at 23.7 million subscriptions a trend easily attributable to the affordability of data bundles as network providers compete for a bigger share of the market.
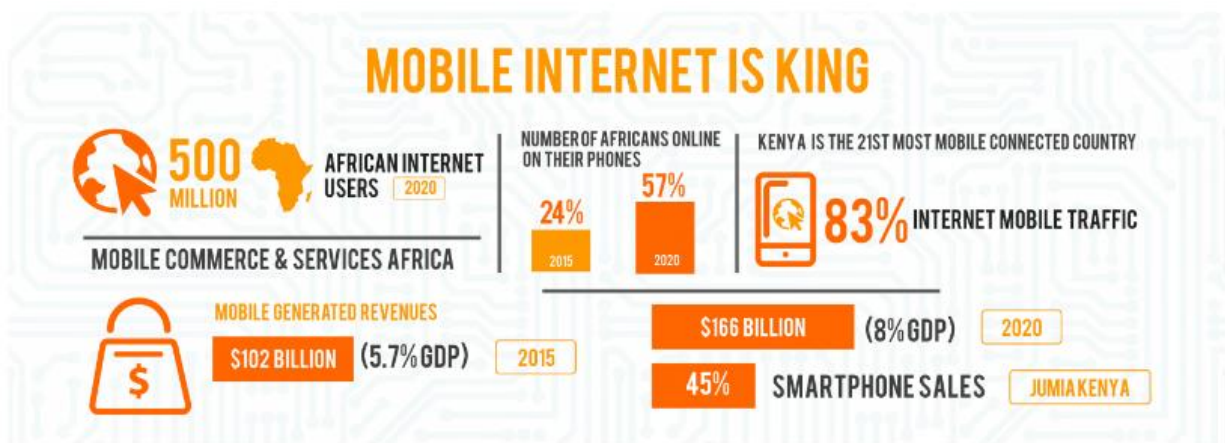
Source: African mobile trends white papers, jumia Kenya, 2016

Population structure: The Kenyan population is still very youthful with a higher percentage of it aged below 24 years. This specific age group that forms the bulk of the country embraces new brands and technology fast hence the easy penetration of internet and products.
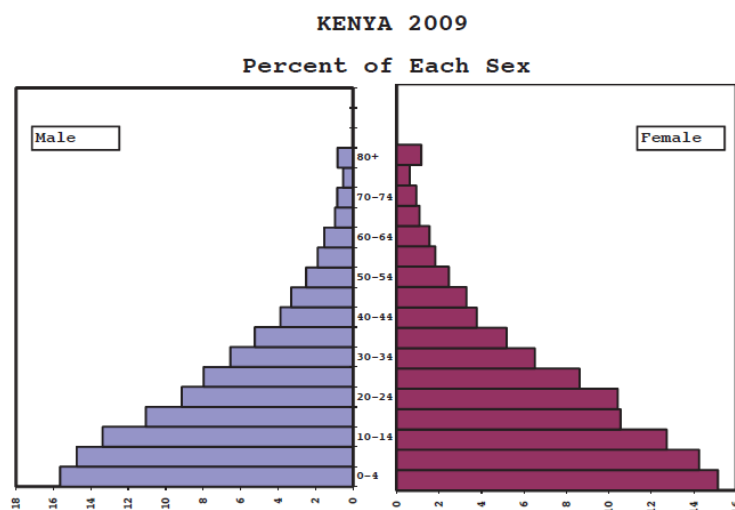

Figure 2: Population Pyramid, Kenya 2009

Source: Kenya National Bureau of Statistics, 2009 Kenya Census Survey

Government Support: The Government of Kenya recognizes that ICT offers enormous opportunity to exploit e-commerce and the importance ICT services play in economic, social and political spheres. To that end it prepared a National ICT Master Plan, covering the period 2008-2012, which outlined the roadmap and implementation strategy to make ICTs more accessible and affordable to the wider population and hence to catapult Kenya into a knowledge and information society status.

The country aimed to establish itself, in the medium to long term, as the hub of industrial and financial activities in the East, Central and Southern Africa region. The ICT master plan (2008-2012) aimed to achieve the following objectives;

- Enhance Kenya's economic competitiveness through utilization of abundant human resources in Business Processes Outsourcing (BPO)
- Develop a knowledge-based society and thereby enhance the quality of life for ordinary citizens
- Ensure universal access to ICT for sustainable development through digital villages throughout the country; and
- Strengthen Kenya's learning opportunities and thereby developing capacity to meet future technological challenges

To achieve the above objectives, the Government implemented the following strategies;

- Put in place initiatives to ensure broadband is available at the most affordable cost to as many Kenyans as possible
- Developed digital content
- Leveraged on digital technologies to unlock new opportunities to do business and for the delivery of services
- Expanded infrastructure that made Kenya the ICT hub for Africa (In progress)

Payment Systems A handful of payment gateways have emerged in Kenya in the last few years, all of them claiming to offer a simple way to accept a wide range of payment methods. **Lipa Na MPESA** in Kenya is a service offered by Safaricom Company that allows business persons to receive payments for goods and services via Mpesa in Kenya. Business people in Kenya receive payments for goods and services through using MPESA Buy Goods service on Safaricom mobile phone in Kenya. The obvious advantage of Lipa Na Mpesa in Kenya is the paperless transaction enabled by the service which greatly reduces the risk of theft and fraud. Business owners in Kenya do not have to worry about fake currency while using Lipa Na Mpesa service. With this in mind, online businesses have leverage on this payment system as it is the most utilized and well known in the country. Customers are able to make payment through unique pay bill numbers allocated to specific online platforms. This has made transactions easier for both the businesses as they don't have to worry about fake currencies and the customer who feels comfortable making the payment through the system

BARRIERS

Despite the favourable conditions and positive indicators on e-commerce, online shopping is still facing various challenges that are slowing down the growth of online shopping in Kenya. The following factors are the key reasons the African internet business ecosystem - especially e-commerce – is not very profitable

*Distrust***:** Kenyans have yet to embrace online shopping, due to online fraud. In Nigeria, for example, where phishing is common, people are skeptical about putting their credentials online. Without attracting the best spenders, the sector will continue to serve primarily college students and a younger population. Some of the companies offer cash-on-delivery to mitigate this challenge.

In Kenya, there cases of fraud have impacted most platforms with worst hit being OLX due to their business model of buyer meets sellers. The business model has made it easy for fraudsters to pose as potential buyers and steal from innocent sellers.

Cost of broadband: Kenya enjoys tremendous growth in mobile internet which is the popular means for people to access the web. While using Facebook may be free on some telecom networks, accessing different sites that has high content to be downloaded tends to increase the cost of internet access. With this in mind, online shopping is thriving amongst the upper class that are able to afford data bundles to access the various sites through their PC, laptops or even smart phones

Logistics: Amazon.com and eBay are great companies that depend on the U.S. postal system to serve their customers. Customers sell items online in U.S.; once a buyer makes payment, the item is dropped off at the post office to close the transaction. In Africa, it's more complicated with nonfunctioning postal systems. Online businesses operate delivery motorbikes, which increase the cost of doing business there. Kilimall has partnered with Posta to use their platform to deliver goods within 48 hours to the respective customers across the country.

African open market: In Africa, there are "markets" everywhere, starting with the security guards who run stores in front of their masters' mansions. There are open markets, supermarkets, and even unemployed youth selling things at traffic stops in major cities. An e-commerce company must beat these entities on prices to be competitive. Because nearly all e-commerce firms are formalized for access to the banking system, they pay taxes. In Rwanda, an 18% VAT can put an online business at a disadvantage when the informal competitors do not collect same.

Fragmented markets: For all the efforts to make Africa appear as one market, it is not. A company has to set up country-specific sites because of barriers from cross-border payments, languages, cultural differences, and other factors. This affects economies of scale and impacts efficient allocation of capital with duplication of resources across the region.

Literacy rates: Even if all the infrastructure and integration issues are fixed, illiterate citizens may be unable to participate directly on e-commerce sites that require reading and writing skills. Chad, Niger, and

Burkina Faso, for example, have literary rates less than 30%. Without investing in the education of these citizens, the pool of potential customers for web entrepreneurs is greatly reduced.
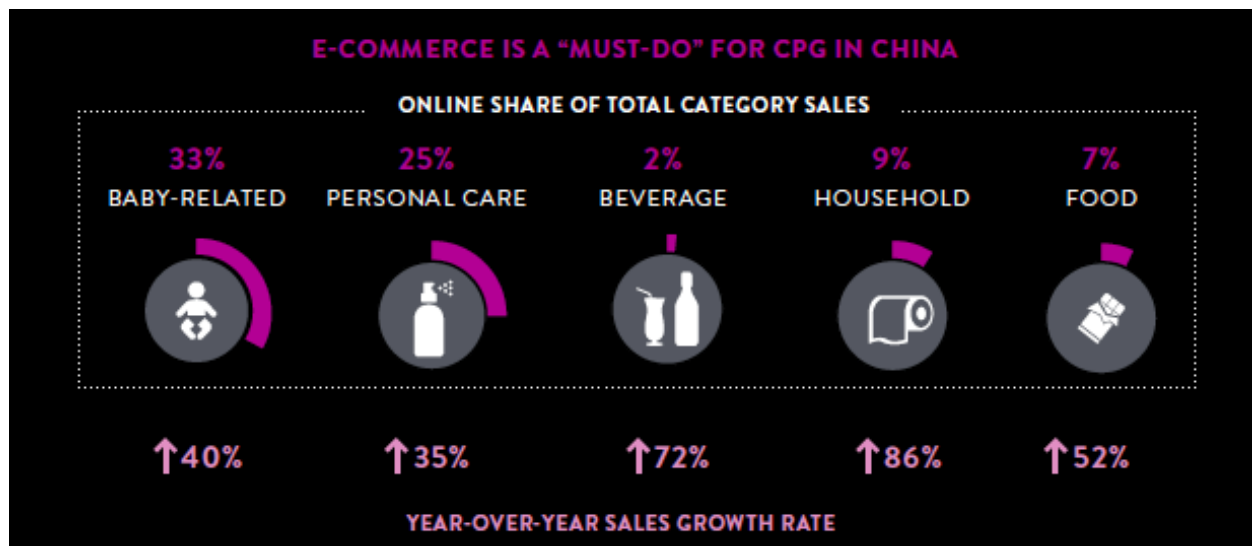
THE EVOLVING SHOPPER

Kenyan market has embraced online shopping and this has seen various online websites sprout but this is heavily skewed towards urban areas and specifically Nairobi. The likes of Jumia.co.ke, rupu.co.ke, OLX and kilimall have offered fast and convenient ways of shopping without having to physically visit a shop to make a purchase. This platform has also enabled discounts on various products as most companies partner with the administrator to have their goods sold on the platform.

Source: African mobile trends white papers, jumia Kenya, 2016

This though has not been the case for online retail shopping, Kenyan supermarkets are still struggling to create traction to their online platforms to make purchases. This could be attributed to lack of awareness and marketing around the same. Most shoppers are not aware that they can make online purchases through their most preferred supermarket. For those who are aware, most of the platforms are still not functional which points to poor support from the retailers.

According to Nielsen global connected shopper study, nearly six in 10 which translates to 57% global online survey respondents made an online purchase in the past six months from an oversea retailer. The same report also indicate that in China, e-commerce sales of consumables show double digit year over year growth

E-COMMERCE IS A "MUST-DO" FOR CPG IN CHINA

ONLINE SHARE OF TOTAL CATEGORY SALES

33%	25%	2%	9%	7%
BABY-RELATED	PERSONAL CARE	BEVERAGE	HOUSEHOLD	FOOD
↑40%	↑35%	↑72%	↑86%	↑52%

YEAR-OVER-YEAR SALES GROWTH RATE

Source: Nielsen 2015 Global Connected Shopper Report

The same study also indicates that the top three payment methods used by online shoppers globally to make purchases in the past six months vary by market depending on trust and penetration of the facilities
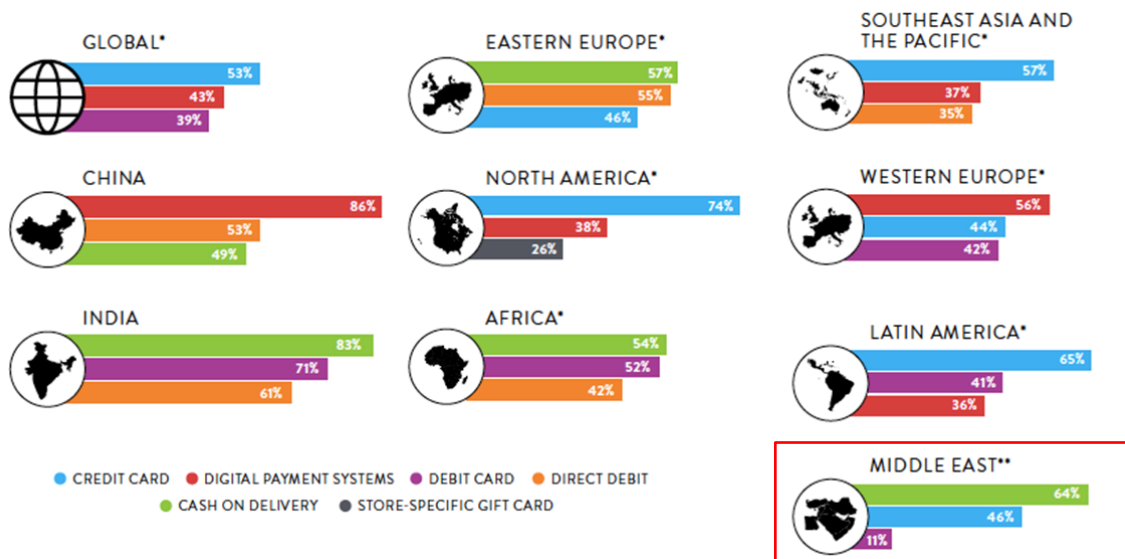
Source: Nielsen 2015 Global Connected Shopper Report

Cash on delivery is popular in countries where credit card penetration and trust are low amongst consumers. This is evident in Kenya where all online companies have given the option of cash on delivery

There is clear motivation for the evolved shopper to make purchases online as opposed to the traditional brick and mortar way. According to Nielsen Global connected Commerce Report 2016, motivators for buying online was;

CONVENIENCE

Reducing time and effort spent shopping

PRODUCT ASSORTMENT

Gaining access to more choices than available locally

INFORMED DECISION MAKING

Getting information and reviews to help make better choices

DEAL SEEKING

Finding the best price possible

ONLINE FEATURES

Managing shopping lists and building baskets over time
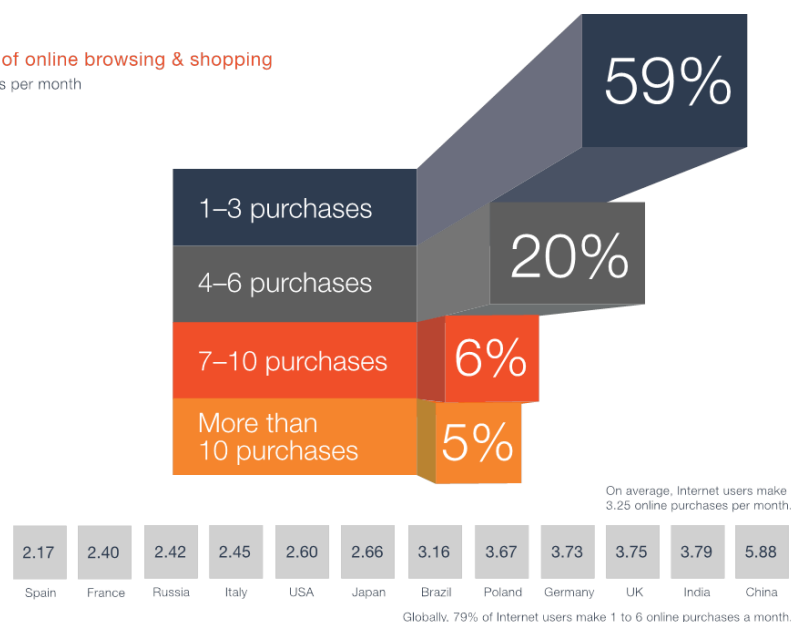
CONNECTED SHOPPER LIFESTYLE

The current focus for Kenya is feeding the demand of the consumers. The country is no longer restrained by slow or non-existent internet connections. There are over 10 million people that now have internet access in Kenya.

Consumers have made it clear that they want to shop online. It is now up to retailers to supply more products and also to provide a safer online shopping experience. There is an opportunity for new online retailers to attract specialized markets and become household names in online shopping. The future of e-commerce in Kenya looks extremely bright. Within the next few years, Kenya may become the overall leader of technology in sub-Saharan Africa, even bypassing Nigeria

According to a study carried out by Geometry global, It reveals, for instance, that while only 7% of Internet users make online purchases regularly, some 65%, nonetheless, use digital channels to research and browse prior to making a purchase. Accordingly, brands and retailers must think beyond online purchase and consider the role that digital channels play in their categories before, during, and after purchase.

Increasing relevance of online browsing & shopping
Number of online purchases per month

1–3 purchases	59%
4–6 purchases	20%
7–10 purchases	6%
More than 10 purchases	5%

On average, Internet users make 3.25 online purchases per month.

2.17	2.40	2.42	2.45	2.60	2.66	3.16	3.67	3.73	3.75	3.79	5.88
Spain	France	Russia	Italy	USA	Japan	Brazil	Poland	Germany	UK	India	China

Globally, 79% of Internet users make 1 to 6 online purchases a month.
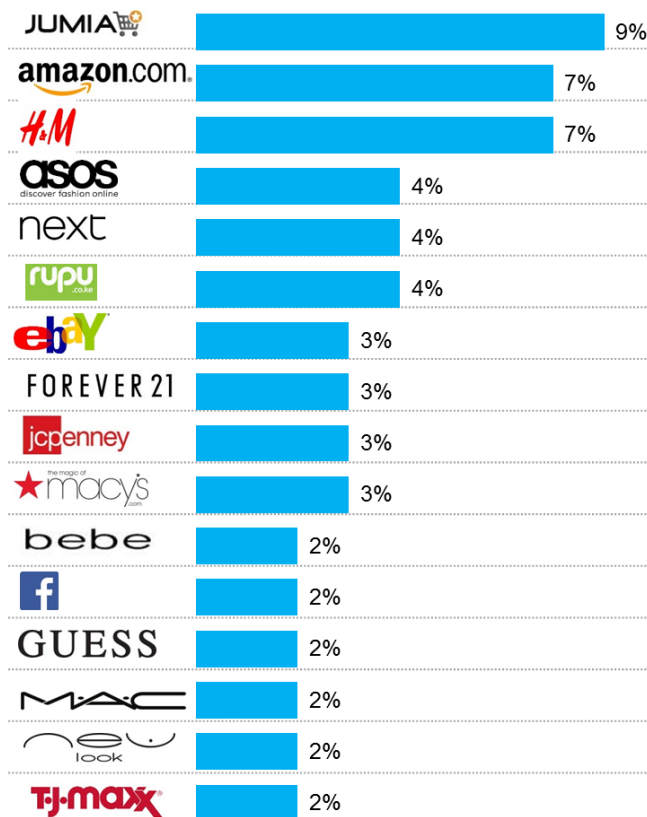
© 2014 Geometry Global

Source: Geometry Global, Connected Shopper Research Study in 12 countries across 4 markets

The degree to which people blend the online and off line worlds for their browsing and shopping depends largely upon how attuned to the Internet they are and to what degree they incorporate it into their lives. Clearly, omni-channel shoppers require segmented solutions adapted to their digital pace and so, through the Geometry Global research, they identified six distinct behavior patterns that shoppers follow, ranging from least to most digital-savvy.

Observers 1
Spectators of digital evolution with real fear of its consequences

Functionalists 2
Those with only the most basic digitization of their lives; oriented toward information management

Explorers 3
Advanced pupils of digital life who are just starting to extract value from digital tools

Experimenters 4
Those adapting to digital life through continuous learning and experimentation

Techsters 5
Converts to the digital revolution, leveraging its possibilities all the time

Future Forwards 6
Multi-device multi-taskers, in constant search of novelties

Source: Geometry Global, Connected Shopper Research Study in 12 countries across 4 markets

According to study carried out by Festival For African Fashion & Arts (FAFA) on online shoppers, guest shopped online for clothing more than fashion accessories. Most visited site in this regard was Jumia followed closely by Amazon which speaks to the fact that Kenyans are embracing cross boarder e-commerce and it it's becoming a growing phenomenon

Site	Percentage
JUMIA	9%
amazon.com	7%
H&M	7%
asos	4%
next	4%
rupu	4%
ebaY	3%
FOREVER 21	3%
jcpenney	3%
macy's	3%
bebe	2%
f	2%
GUESS	2%
MAC	2%
new look	2%
T·J·maxx	2%

Base = 41

Source: Festival For African Fashion & Arts (FAFA), Online Shopping Study, 2014

SUCCCESS STORIES

OLX

Founded in 2006, the company has grown to 1,200 employees and operates in 40 countries. With 11 billion page views, 25 million listings, and 8.5 million transactions per month, it is the largest marketplace in India, Poland, and, as of last year, Brazil. Funded by U.S. venture firms including Bessemer Ventures and General Catalyst Partners, OLX sold a majority stake to the African conglomerate Naspers in 2010. OLX is free to use and makes money selling promoted listings to users. (Payments are conducted offline, which has allowed OLX to avoid dealing with legacy payment infrastructure in each market it enters.

For Mr. Peter Ndiang'ui, the head of OLX Kenya, the campaign represents the most important lesson borne after the company was forced to change its name from Dealfish Kenya two years ago. He was then the regional manager for East Africa. Back then, the company ran its marketing campaign entirely on the internet. It was, after all, an internet based firm.

"One of the key lessons I learnt is that when we communicate to Kenyans, and to an extension the whole emerging market, we have to be careful that we don't assume that the internet is the only channel you can communicate an internet brand" he says.

Mr. Ndiang'ui realized that a platform like OLX, which purely facilitates consumer-to-consumer transactions, required a marketing model similar to fast moving consumer goods like beverages. He says this lesson can help other internet startups to avoid the Dealfish pitfalls. "This is a market where the use of the internet is at its infancy. If you are going to do something that extends that usage, then you have to think differently from the way other brands have grown in the west," he advises.

The OLX Kenya manager says the media campaign is an expensive but necessary venture. Because of the heavy expenditure, he predicts that the firm will break even in 2018. Presently, he points to the quick uptake of their product as proof that the campaign is paying off. "I have never bought into the notion that Kenyans have a knack for distrusting any business conducted online. It has always been an education issue. And that is why we have invested heavily to educate them, ensure that they understand what they have to do to trade with each other online," he adds.

JUMIA

Jumia is a leading African Ecommerce marketplace (much like Amazon), backed by Africa Internet Holdings. It is active in Nigeria, Egypt, Kenya, Ivory Coast, Morocco, Senegal, Ghana, Cameroun, Tanzania and Uganda. It is Africa's largest and fastest-growing e-commerce retailer.

According to Miller "There is a huge growth of retail market here in Kenya – a lot of new malls, a lot of ongoing construction – but still there is a lack of certain brands that you can't get in Kenya," he says. "Instead of having to ship an item to an address in the UK and then wait a month for a relative to come visit, Jumia allows this group of people to buy locally. We ship a lot of [international] brands that don't exist here."

KILIMALL

Kilimall, founded by three local entrepreneurs and a Chinese businessman to bring together a broad variety of vendors onto its e-commerce platform, the key motivation of forming the company was to address the high cost of imported products

"In the traditional ways of trading there are many middlemen in the supply chain, and the margin increases each time the product switches hands. This makes the price in Kenya almost three times more expensive than in developed economies. I think that technology and internet can change this and reduce the costs," says Tao.

KiliMall currently has a network of 500 merchants who sell their products via the platform. Some of them, Tao explains, also have physical outlets, while others are small traders operating from their homes. KiliMall offers its merchants free warehousing in the capital Nairobi, from where sold goods are transported by the firm's fleet of motorcycles and vehicles.

In 2016, to address the logistic nightmare that comes with online business, Kilimall partnered with Posta to ensure quick delivery of items purchased by the customers.

RUPU

At the age of 28, Ben Maina sits at the helm of an e-commerce business that has been described as the Groupon of Kenya. In 2010, Maina quit his job at an internet service provider (ISP) to co-found online discount shopping website Rupu.

Rupu gives consumers discounts on goods and services in the form of deals on the premise of group buying, where a minimum number of people have to sign up for a deal. The business, which started with a team of six, today employs 40 people, has over 40,000 active users and has featured over 500 Kenyan businesses.

Rupu has proved to be a success among female buyers who make up about 60% of the site's clients. The items sold on Rupu include household appliances, health and beauty products, and fashion and lifestyle goods.

"Women tend to spend more in terms of impulse buying which is what deals are about. We tried a couple of products but the ones that really sold were skewed towards women, so we just concentrated on those areas," said Maina.

Last month, the firm launched RupuShops and RupuTravel, an online travel portal that offers travel packages.

CONCLUSION

Kenya being the regional hub of economic, social and political economies of East and Southern Africa has seen tremendous growth in e-commerce. In this context, the government has also put in place different measures to ensure development of e-commerce

Developing telecommunication infrastructure in the country to achieve meaningful e-readiness: Kenyan MSPs have put enough resources in ensuring that they provide fast and reliable internet. Over the last years, the country has moved from 2G to 3G and currently a portion of the population are able to access 4G which will ensure fast mobile internet connectivity.

The government has created a business environment which is conducive to and encourages widespread prevalence of e-businesses practices countrywide. All government offices are meant to embrace e-procurement by end of 2015. This is going to ensure high traffic to the internet as all business people will have to visit the respective sites to get tenders

Over the last few years, various e-platforms have sprouted with the likes of OLX, Jumia, Kilimall, Rupu, uzanunua, soko huru creating a strong brand name and presence in the country. As the upper class shopper continues to embrace this convenient and affordable way of purchasing, there will be a shift from the traditional brick and motor way of shopping to online.

As innovation continues to play a critical role in the behaviour of the shopper, this is going to catapult online shopping even more. Transportation which was initially a challenge has been negated by the motorbike transportation that has developed Apps similar to Uber and can easily partner with the online platforms. Kilimall being a major example having recently partnered with Posta to ensure the quick delivery of items (within 48 hours) to the customer

As the Kenyan shoppers continue to metamorphose towards omni-channel shopping, there is a clear need for retailers to start embracing the change. "Web rooming" is becoming a key component of the shopper journey replacing show rooming.   Shoppers are walking into the retail shops with more information on what they are planning to purchase which reduces interaction levels that the retailer initially had. Creating a presence on the online platform will evidently tap on to the shoppers that seek webroom.

As researchers, a total   mind shift on how we measure shopper behaviours need to be embraced. Traditional shopper journey and exit interviews surveys leaves out a significant part of the decision making process that takes place on the website. There is a clear need to appreciate the impact the online shopping is having on the shopping behaviour of the new digital customers. E-tail therapy is slowly becoming the new retail therapy

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