

# iStats Report

1<sup>st</sup> September 2015



# What Is iStats?

iStats is a social media monitoring solution that tracks activities of Kenyan brands on twitter – and soon – all over the web

## Report Compiled By:

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# What The Report Is About

This Report is a measure of brand conversations with the aim of outlining the most talked about brands on twitter in Kenya and - by extension and additional metrics - the most visible brands in Kenya on twitter.

Special Thanks To James Wamathai, Anthony Mugendi, Njeri Wangari, Shitemi Khamadi, Dennis Kioko, Samuel Mbugua, James Wachira, Mark Kaigwa, Mbugua Njihia, Mbugua Gitau and all staff at Internet Exposure Limited For Their Assistance During Various Stages of compiling This Report.

# Terms Of Use

## The Legal Stuff

### Definitions

“Report” – All that is part and parcel of this document

“Provider”- The person(s) responsible for compiling the report

“Data”- Information shared within the report

“TOS” – The Report terms of service which constitute an agreement between the User and the Provider;

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By reading this data you agree to the following Terms Of Service;

The aim of the report is to provide data analysis for usage of twitter in Kenya in relationship to brands.

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# Report Overview

What Is It All About?

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## WHAT

This report is compiled from data based on 1.13M tweets spanning across 95 brands. Categories include Media, Banking, Energy, FMCGs, Motoring, Insurance, Retail, Service and Telcos and Tech

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## WHY

The data was compiled to give a comparative report of how brands are performing on twitter in terms of conversation – driven by the popularity of twitter locally

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## HOW

All data collected and compiled via automated proprietary software using the official twitter API over a period of 8 weeks. Terms of use for this API apply as given by twitter.com

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## WHEN

The data in this report is based on an 8 week period (June 30 to Aug 25). Data outside this period – collected the same way as specified- is included for comparison.

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## WHERE

Geo location was not the driver of the research thus anyone who mentioned the brands was included in the data collection. However the audience is predominantly Kenyan

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## WHO

The data collection has been done on a very large part by automated software and human effort was applied for additional analysis if and where needed

# Let's Begin!

For This Research 95 Brands Were Involved. Ranking is based on These Brands

Three metrics are used. Number of posts mentioning a brand, number of unique people mentioning a brand and the average following of the sum of users mentioning the brand to estimate reach



**Enough Of The Formalities!**



**Where Do We Start?**

**The Top Ten List is Always A Good Way To Start!**

# Top Ten Brands

Calculated on number of mentions, number of distinct users and average following of these users



1



4

KTN  
Television

2

Citizen TV  
Television

5

Capital FM  
Radio + Website\*

3

Nation FM  
Radio

6

Homeboyz Radio  
Radio

7

K24  
Television

8

Daily Nation  
Print

9

Safaricom  
Telco

10

Airtel  
Telco

\* The Capital FM brand has various differentiated twitter handles with the main one handling website content and each radio show having a separate account. All are included in that ranking

# **Traditional Media Seems To Be Dominating The Top Brands**

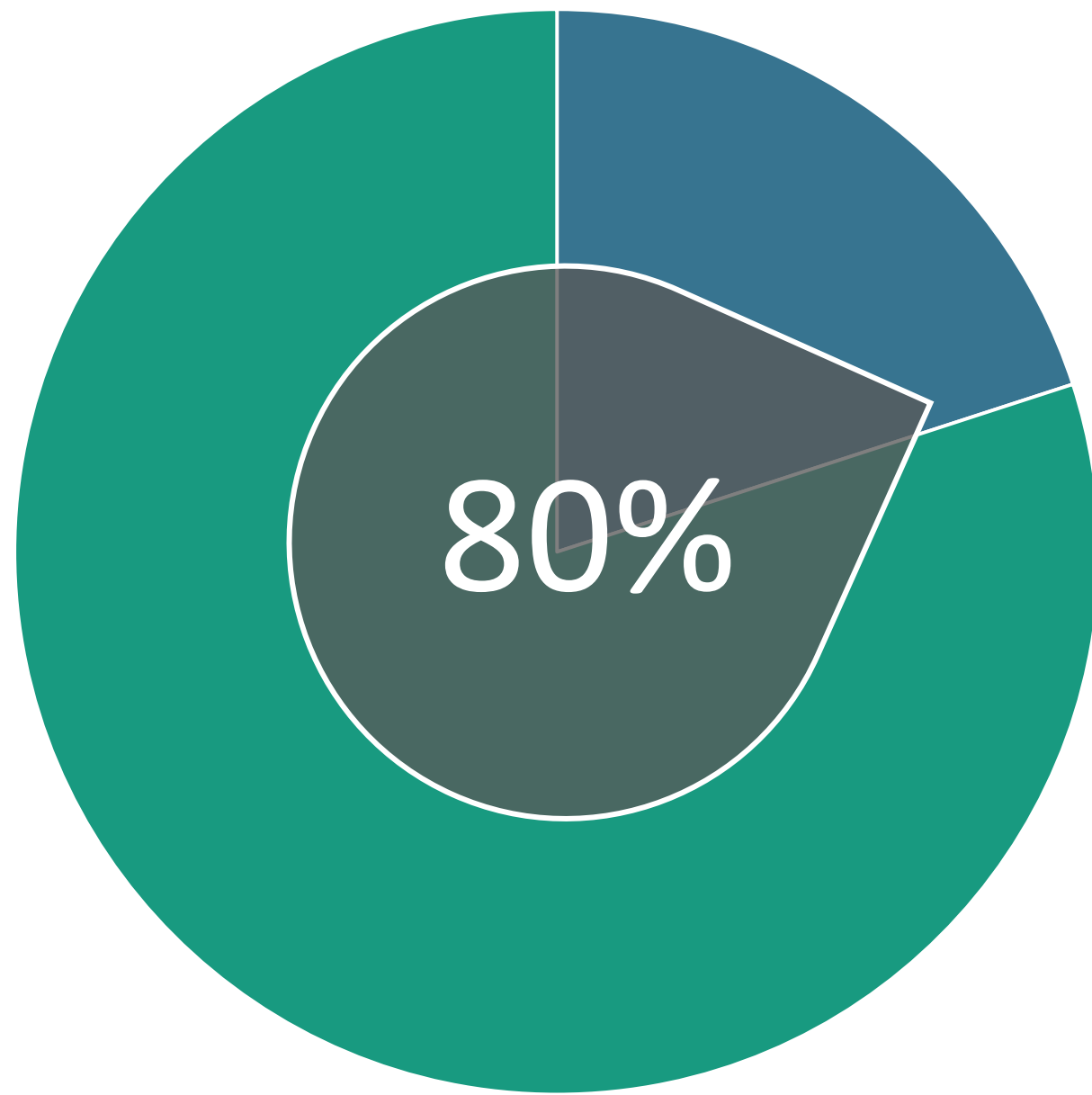


**But Just How Much Is Their Dominance On  
Twitter Over Other Brands?**



# Call It Total Dominance

Of The Top 10 Brands in terms of mentions and reach, traditional media take 8 positions



All Top 8

## Over 80%

Of All Collected Mentions

Traditional media (radio, TV and print) dominate brand mentions. They dominate the top ten positions in terms of brand mentions and the only two non-traditional brands that make the top ten are Telcos – Safaricom and Airtel.

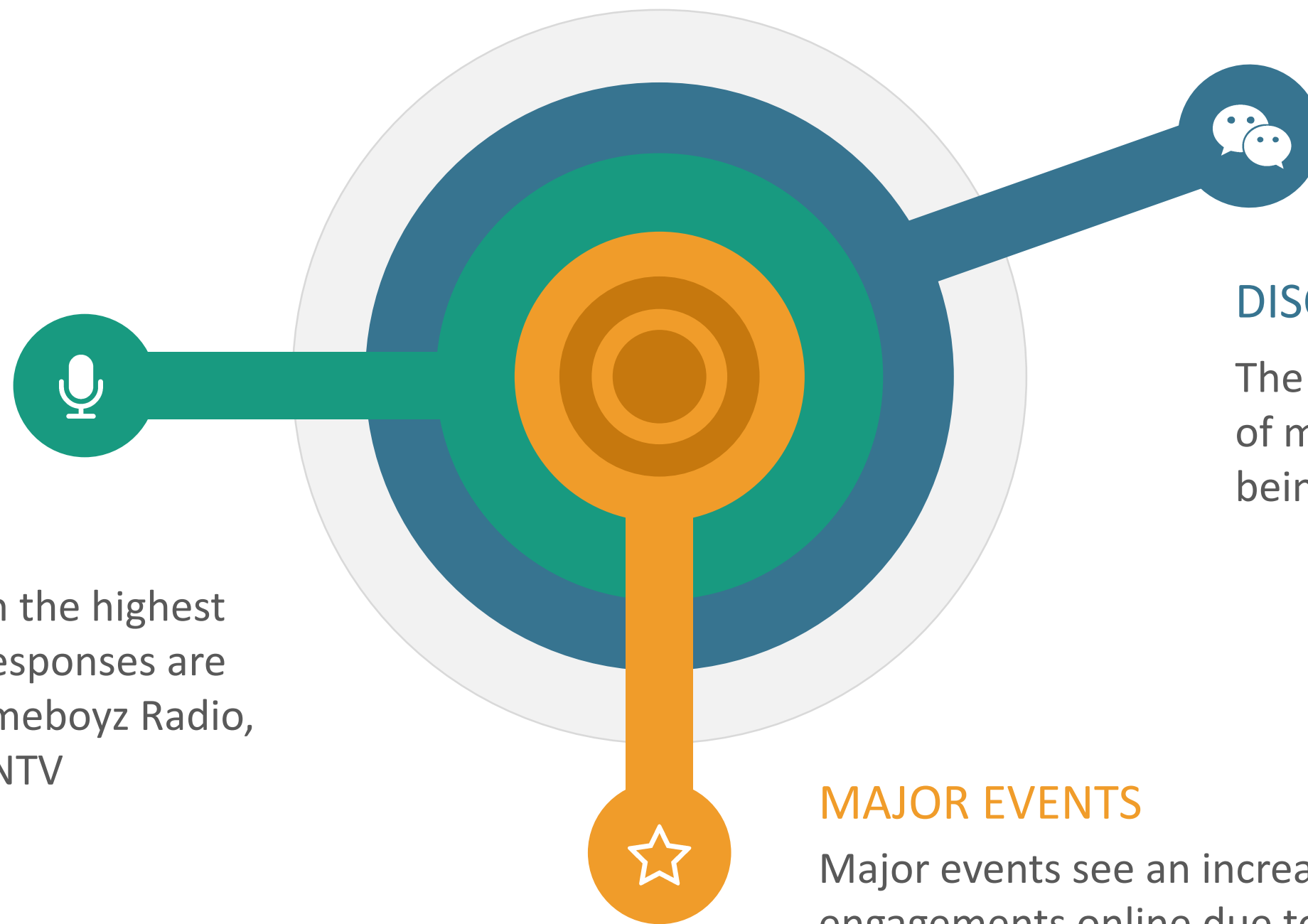
**Why Is Media This Dominant?**



**What Drives These Conversations In Media?**

# Discussions. And Members Of Their Staff...

Content Marketing Pushed Across Channels



## MEDIA PERSONALITIES

11 of the top 15 users with the highest brand engagements and responses are media personalities at Homeboyz Radio, Nation FM, KTN, K24 and NTV

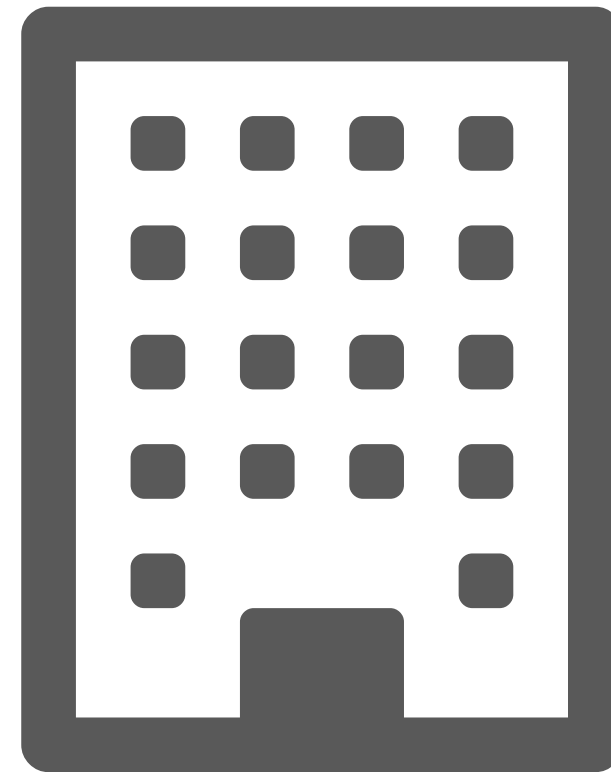
## DISCUSSIONS

The trend for example retains high number of mentions overall in the standings despite being off-air most days of the week

## MAJOR EVENTS

Major events see an increase in number of engagements online due to presence of more people online scouring for info. The recently concluded GES is an example.

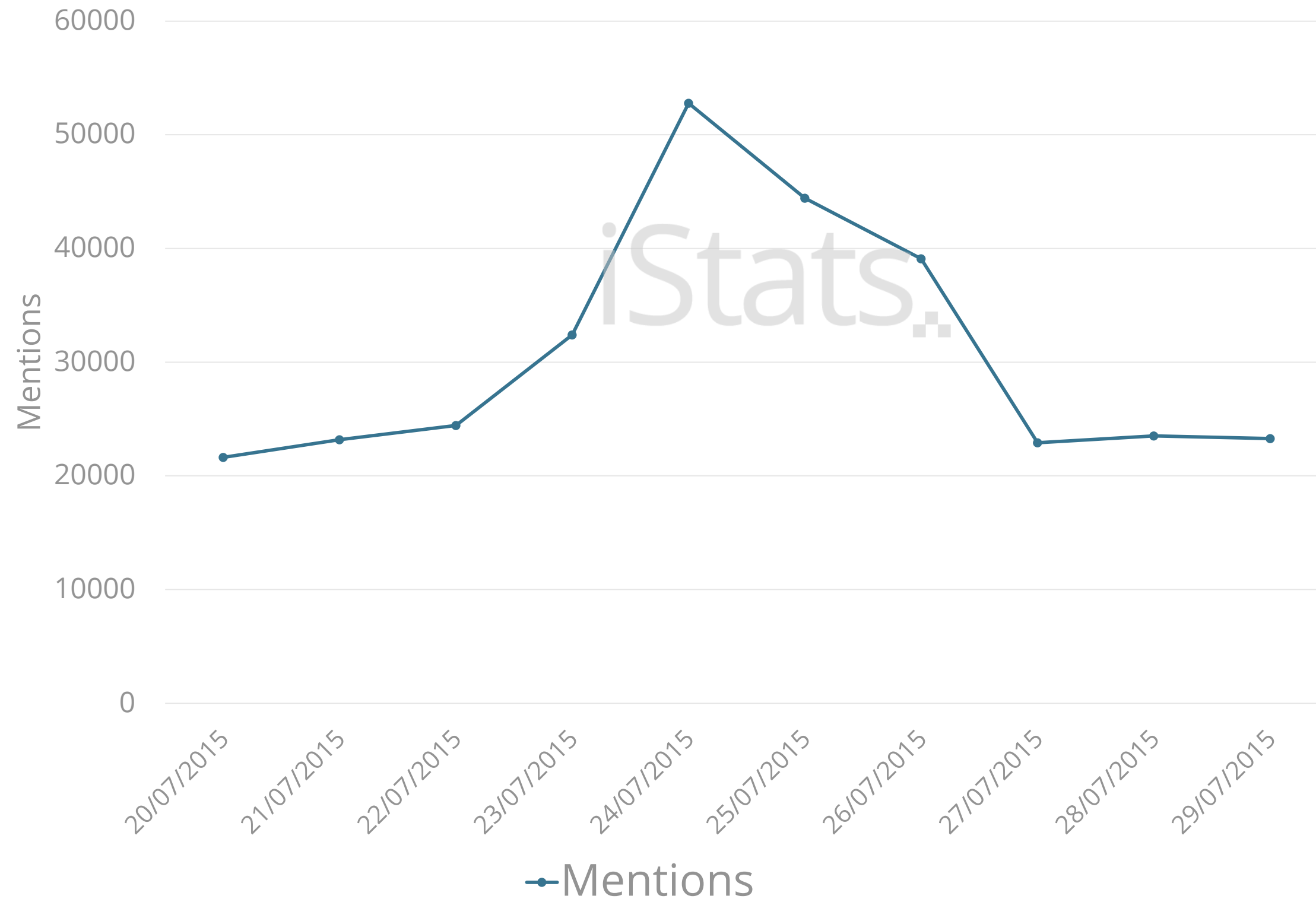
**Talking of GES ...**



**How Did Brand Mentions Behave During  
Obama's Visit?**

# Brand Mentions Doubled During Obama's Visit

The Graph Below Shows The Ten Day Period Before, During And After Obama's Visit.  
The Highest Mentions were recorded on his arrival on 24<sup>th</sup> July 2015.



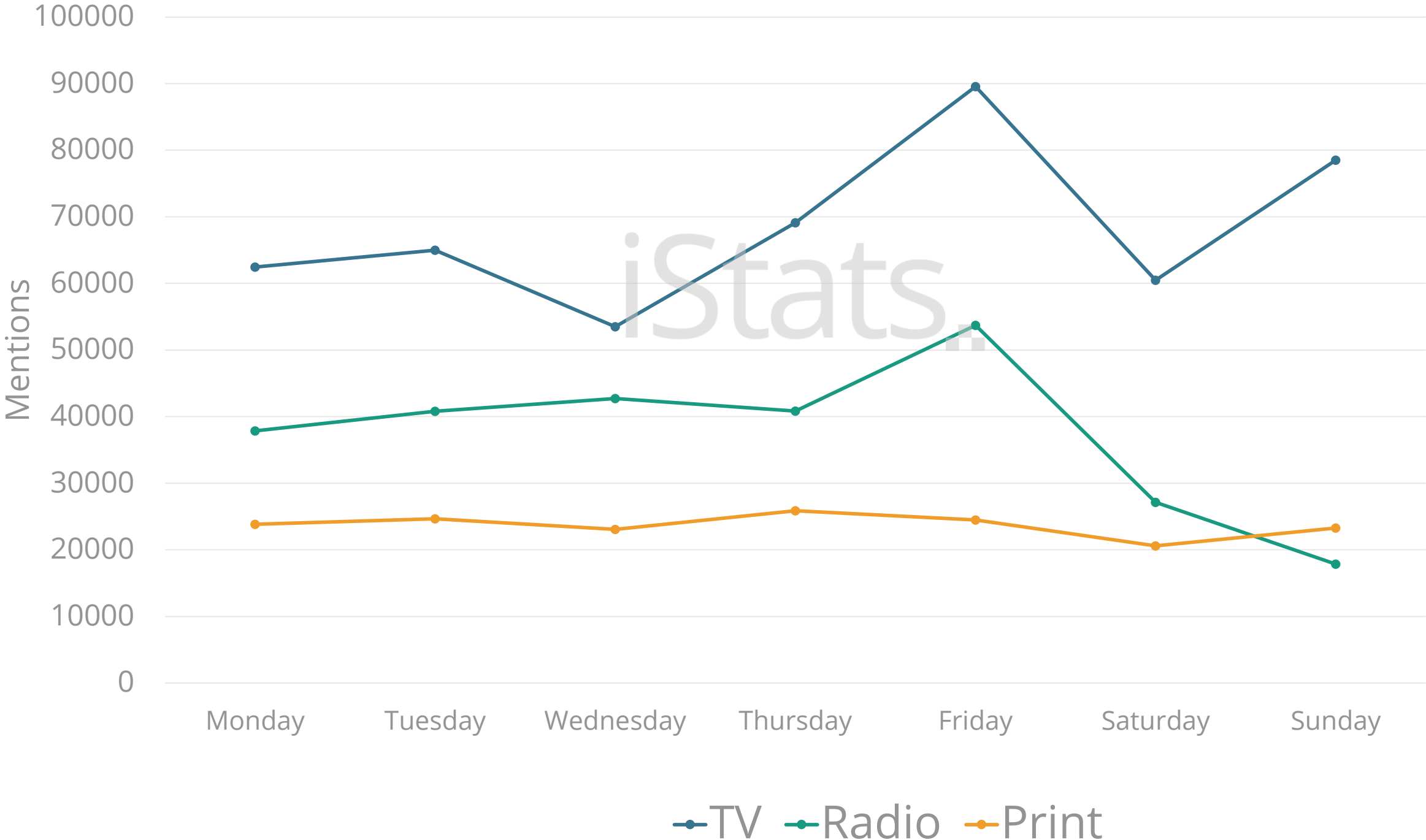
**Back To Media ... Traditional Media Has Really  
Hit It Off In The Digital Age On That Evidence**



**But Who Between Radio, TV and Print is Best  
At It?**

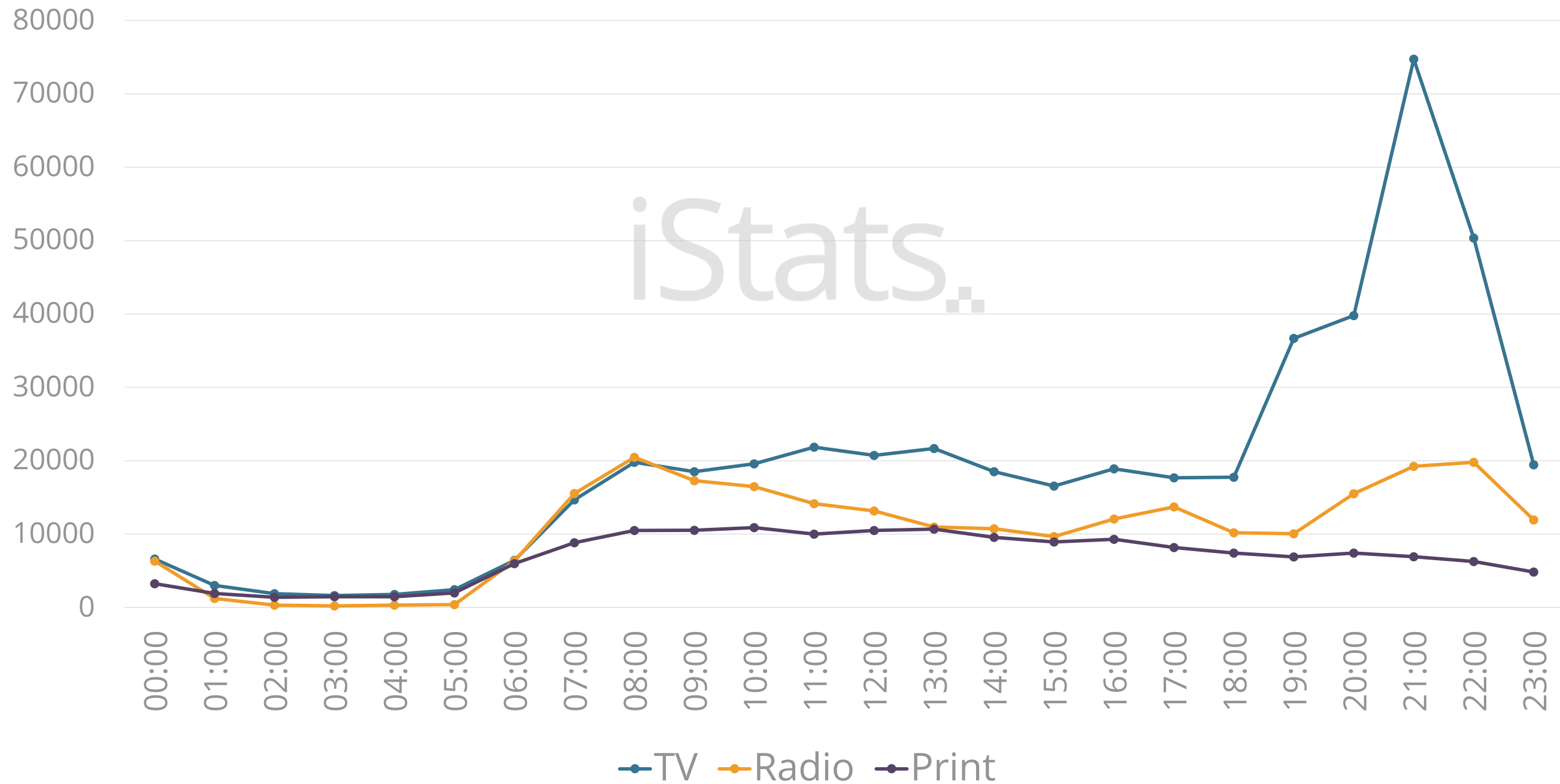
# TV is Most Talked About - Without a Doubt

TV emerges top each day of the week with radio a distant second. Print is way below the two. However, note Radio gets very little in mentions and reach on Sunday – coming even below print



# Most Talked About Distributed By Time

TV still dominates radio and print with radio only slightly edging TV mentions between 6:30am and 8:15am





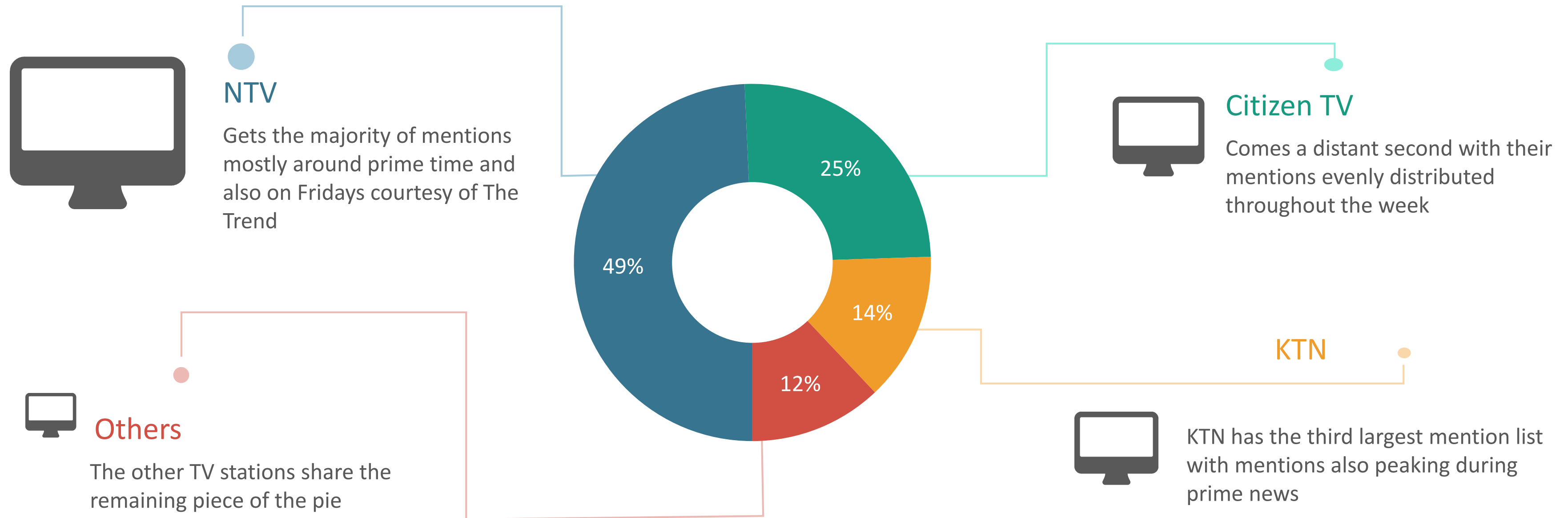
**So Basically, TV wins hands down**



**But How Is The Top TV Station Fairing In The Fight On  
The Second Screen?**

# NTV is Ahead of The Pack ... By A Mile

Over the research period NTV is far ahead of rivals with nearly 50% of TV conversations mentioning them



**Kudos NTV!** 🏆

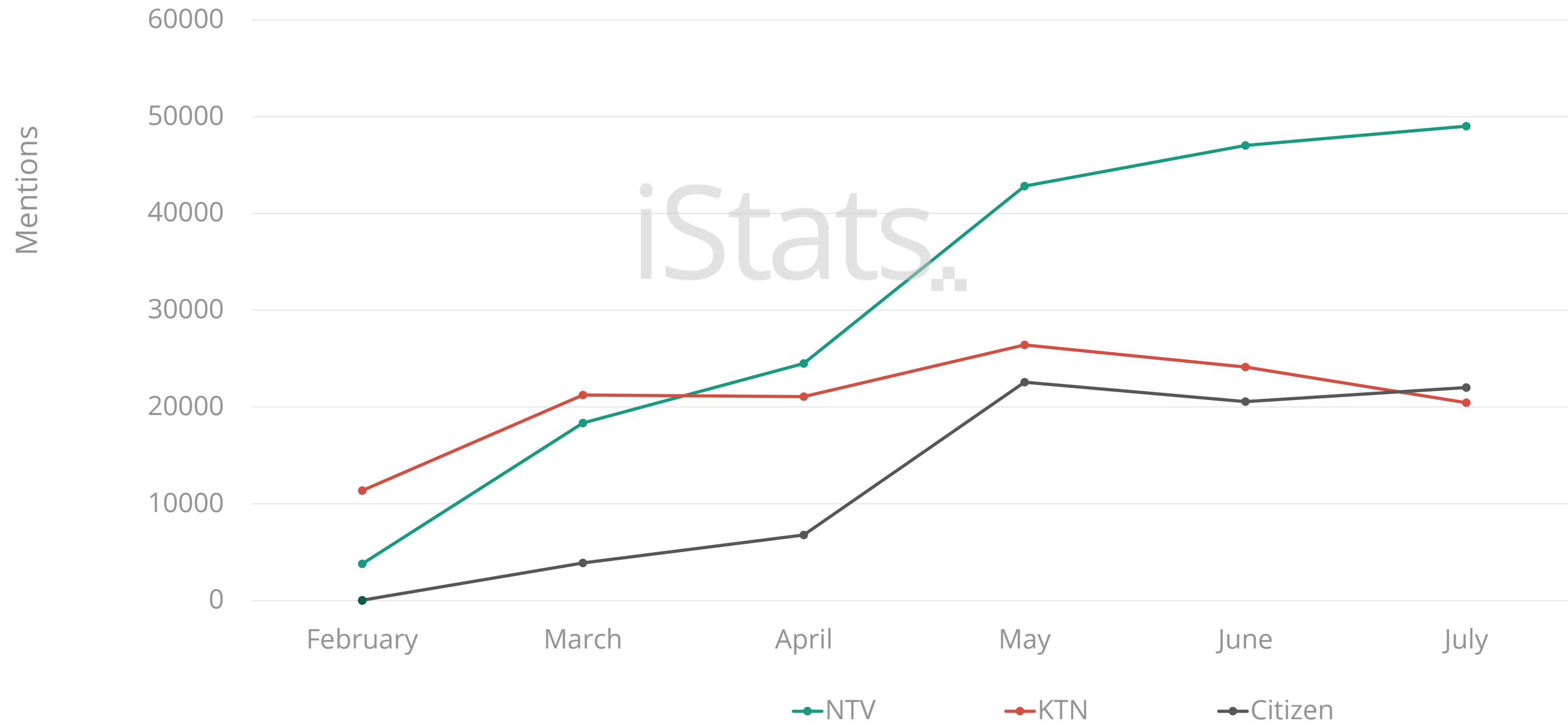


**So How Has NTV fared in the last six months?  
Has It Been Top?**

# Not Really. NTV's Surge For Top Spot Started In April

But the momentum shows no signs of receding.

Also notice the low mentions during the Digital Migration Debacle for all the three stations.



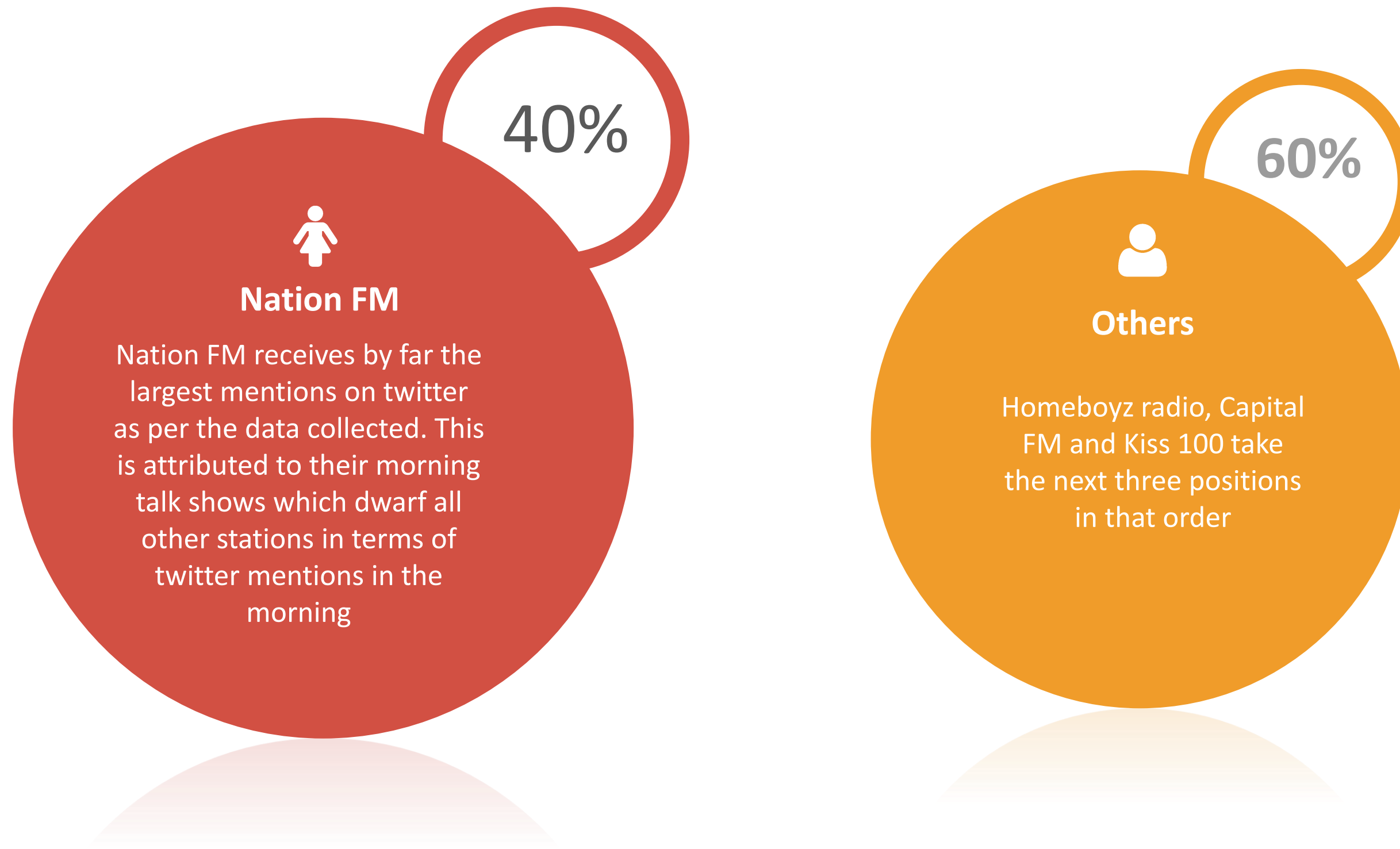
# What About Radio?



**Which Radio Station Gets The  
Most Mentions?**

# Nation FM

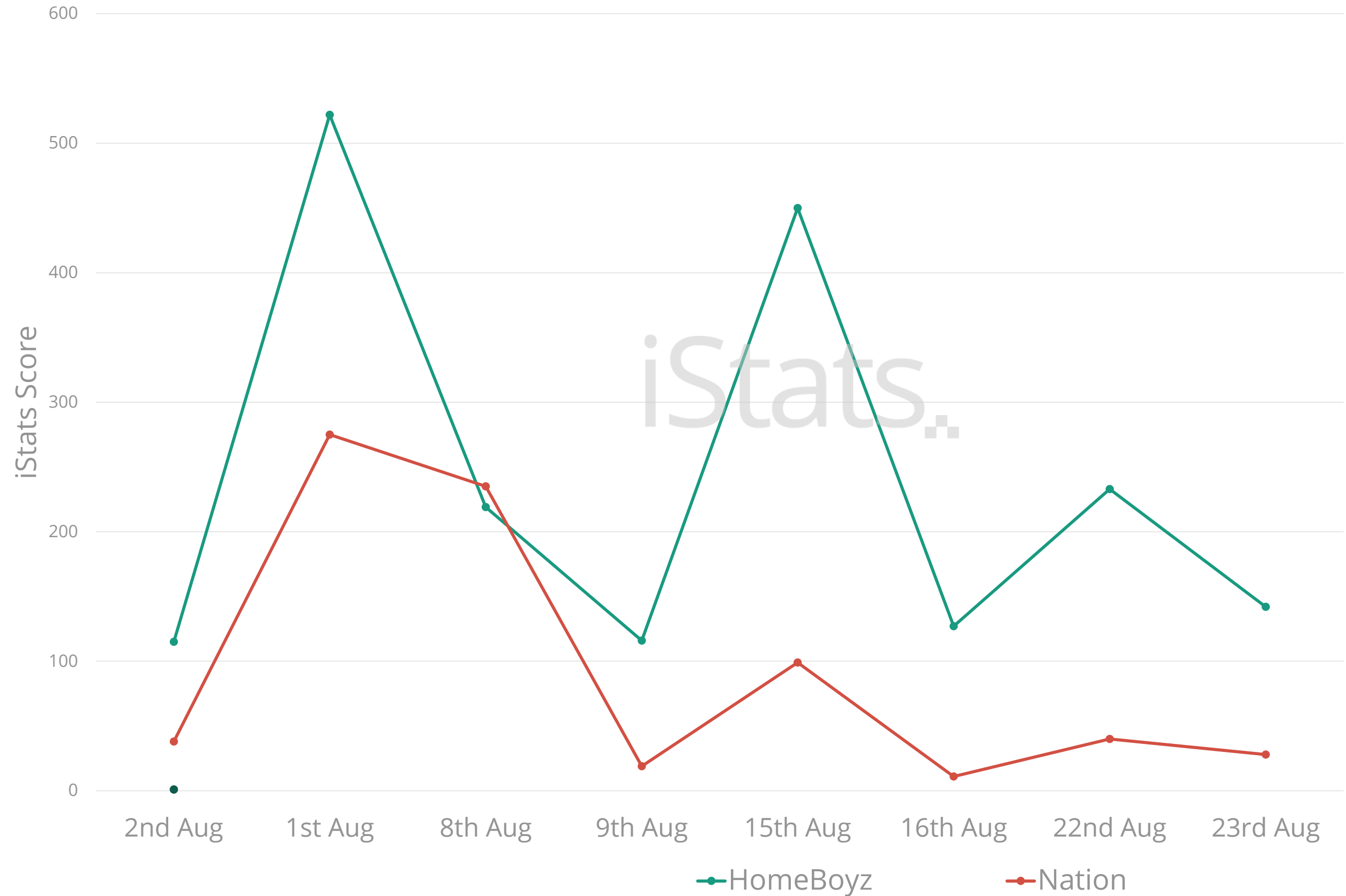
By A Mile. The stations gets close to half of all radio mentions on twitter – except on Weekends





**So Who Beats Nation FM on Weekends?**

# Homeboyz Radio. Consistently.

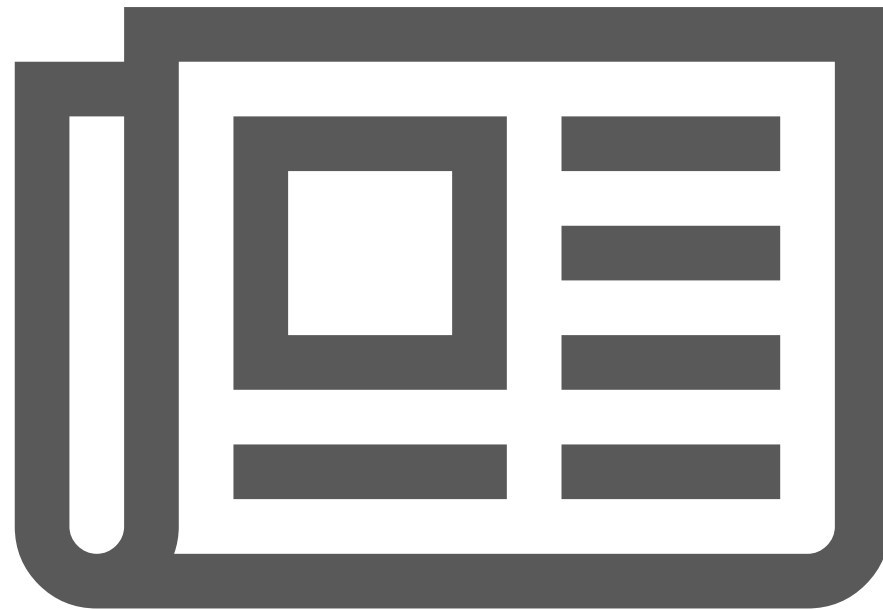


Despite ruling the weekdays, Nation FM is overran by Homeboyz Radio on most weekends as data alongside shows. This is why HBR beats the other two stations in their ranking.

\*Data shown alongside is for the weekends in August 2015.



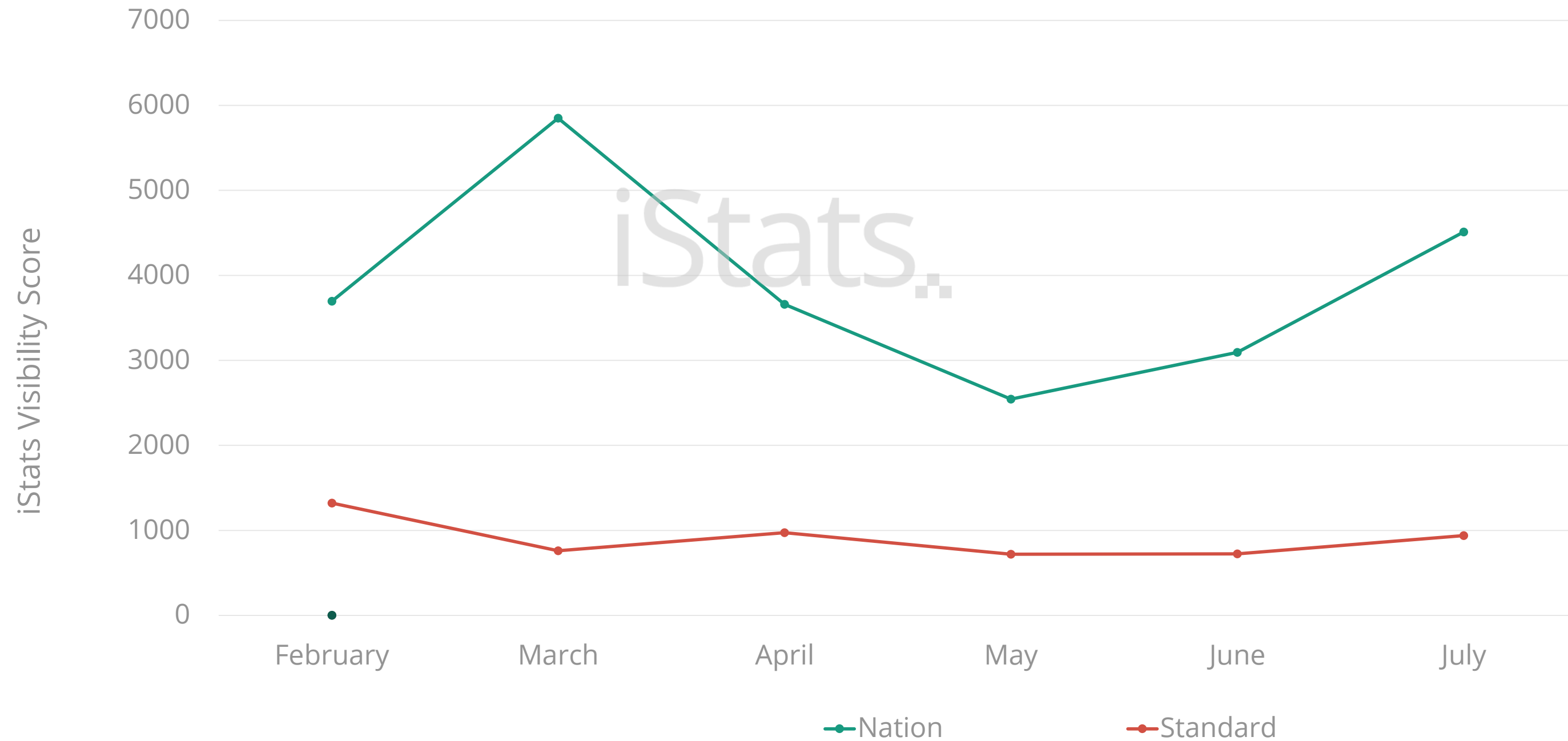


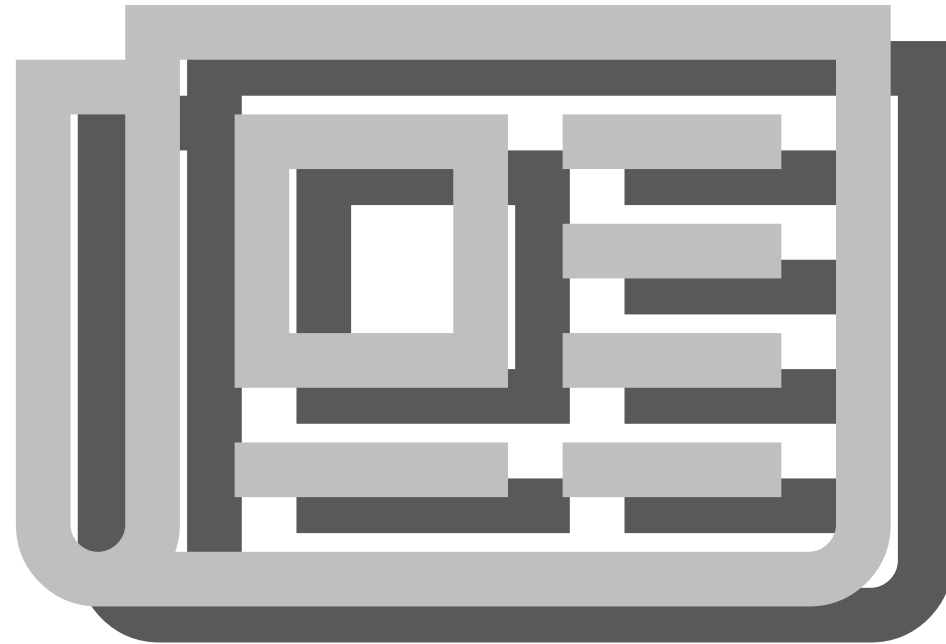


**What About Print?**

# Daily Nation Rules Print Online

Daily Nation outscores its closest competitor by up to five times on some months





## **What About Digital Publications?**

For this segment, we only included digital publications that do not have print versions. So who wins?

# Capital FM Website

Capital FM website is the runaway winner in this category even competing with the big boys in the category sometimes even matching Daily Nation's numbers.

1st



**Capital FM**

The Capital FM website gets the highest mentions on this one . The number of conversations generated by the Capital FM website is double their closest rival

2nd



**Ghafa/Mpasho**

The two are currently stuck in a statistical tie with neither having a clear lead over the other during the period



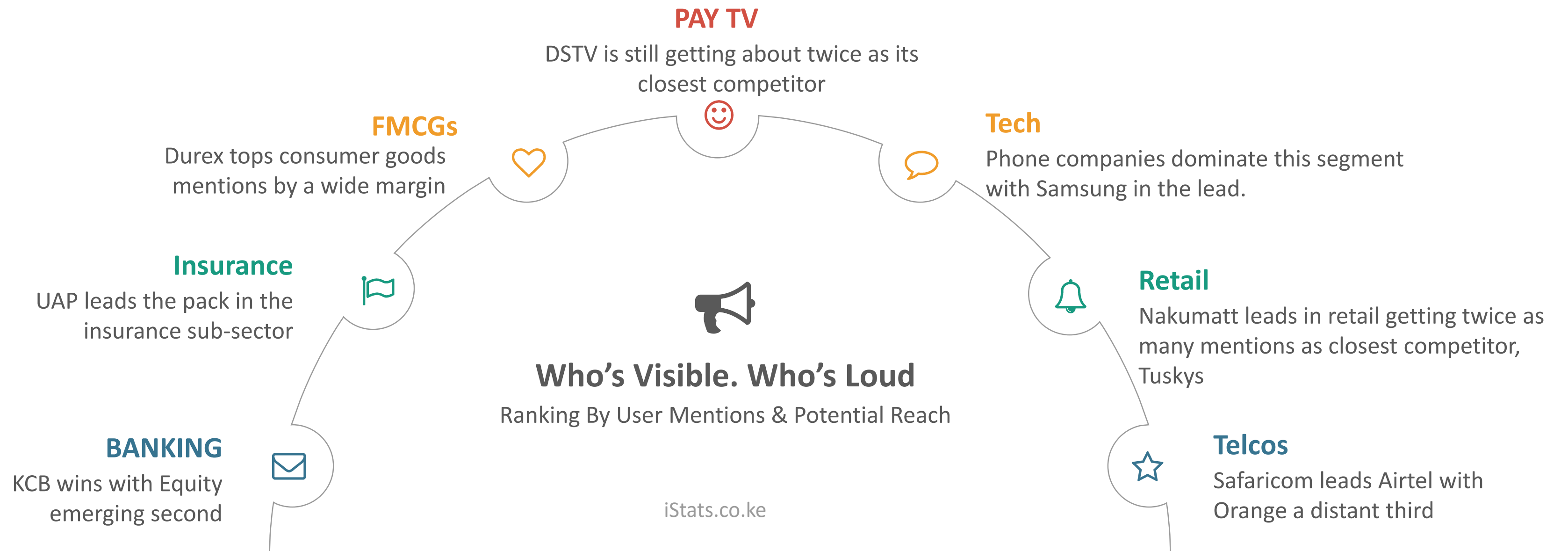
**Enough About Media ...  
What About Other Corporates? Who is Leading  
Where?**

# Battle Of The Brands

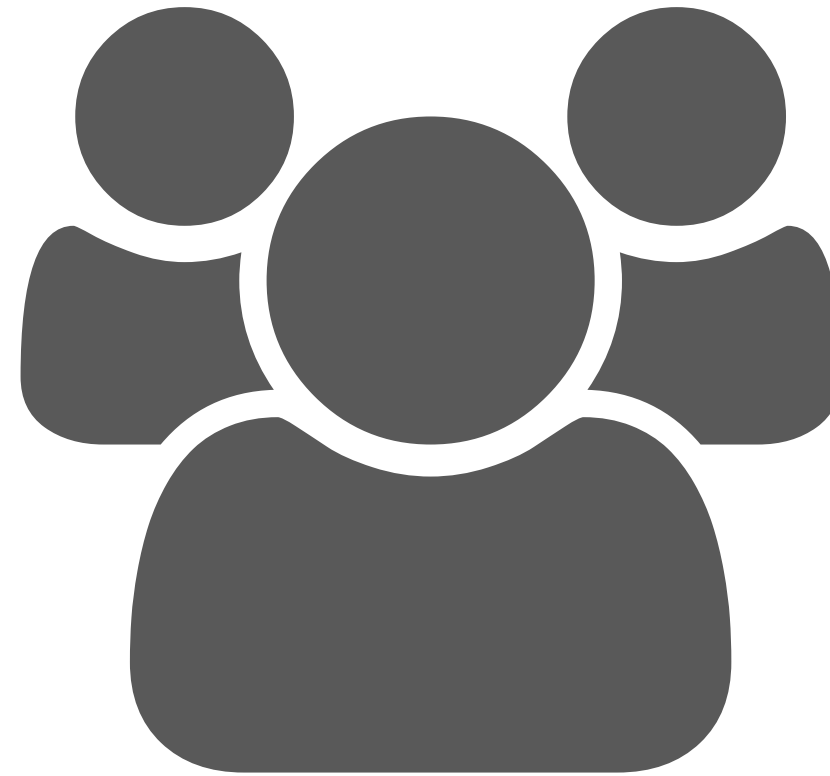
Who Is Leading Where?

## Banking & Telcos are The Most Vibrant

Banks and Telcos take over 70% of mentions for the other brand categories – mostly owing to service requests.



**Good To See Who's Winning But What Are  
People Saying?**



**Who Is Getting The Most Positive Sentiments?**

# Well ... Durex. Just Happy Vibes!

Durex content rose to the occasion to score the highest score in the positive sentiment

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## SENTIMENT ANALYSIS

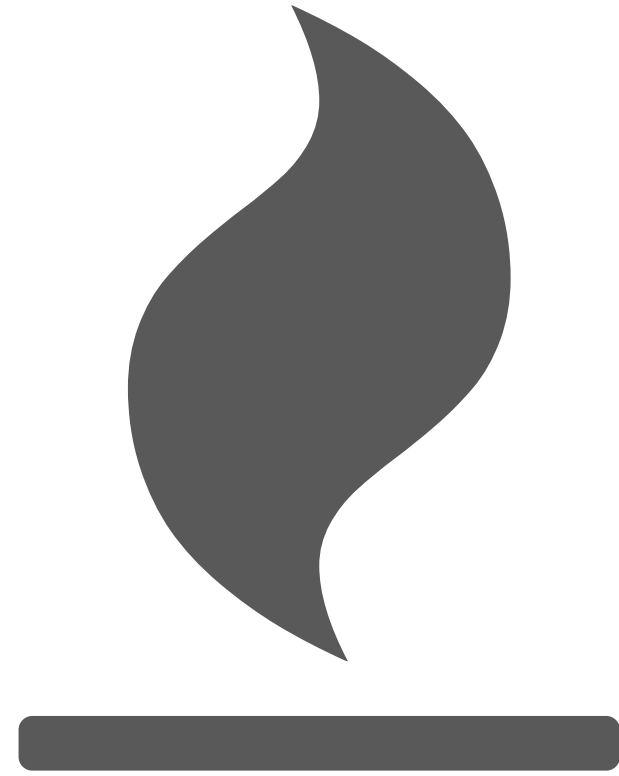
Durex gets the highest percentage of positive content of all brands sampled.

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- Sentiment score checks for keywords and phrases that depict the tone of a post
- The post is then scored between 0.0 to 1.0 where 1 is fully positive and 0 is negative
- Tone is however contextual and may or may not be directed at the brand



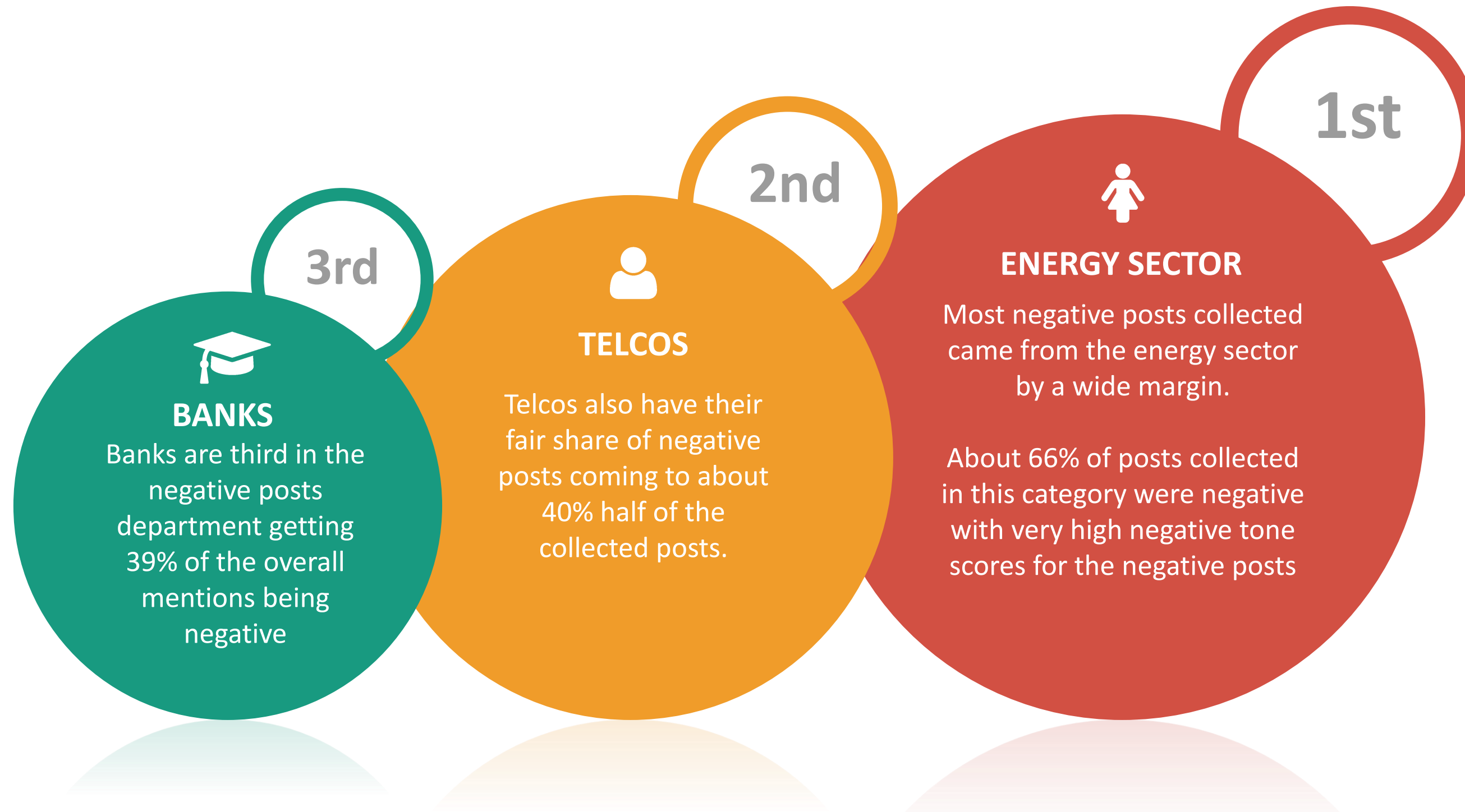




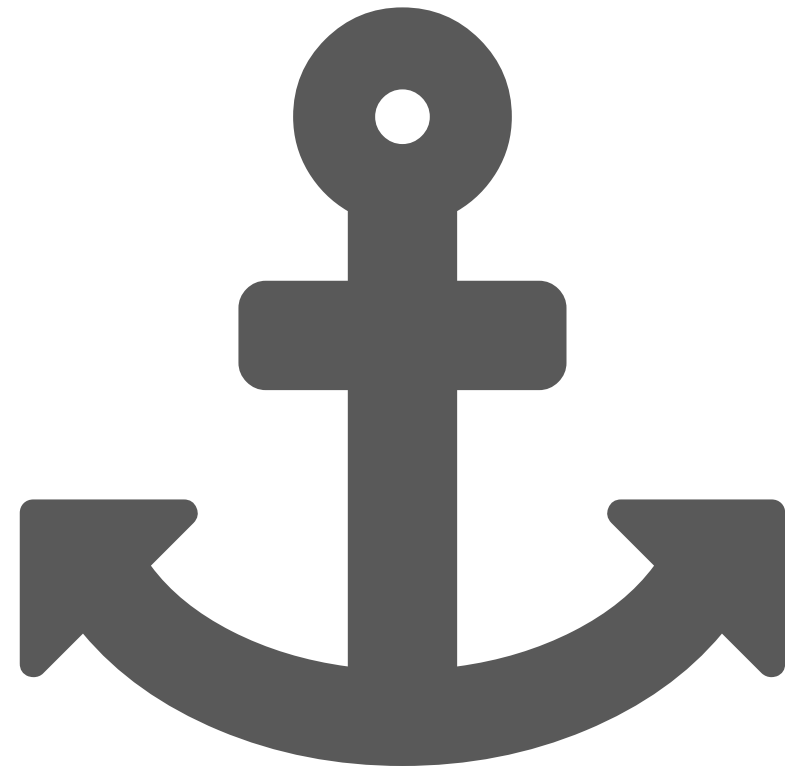
**Interesting. But which categories are burning rubber on the other end of sentiment?**

# Power Issues Make A Lot Of People Mad

And They Are Not Afraid To Say So



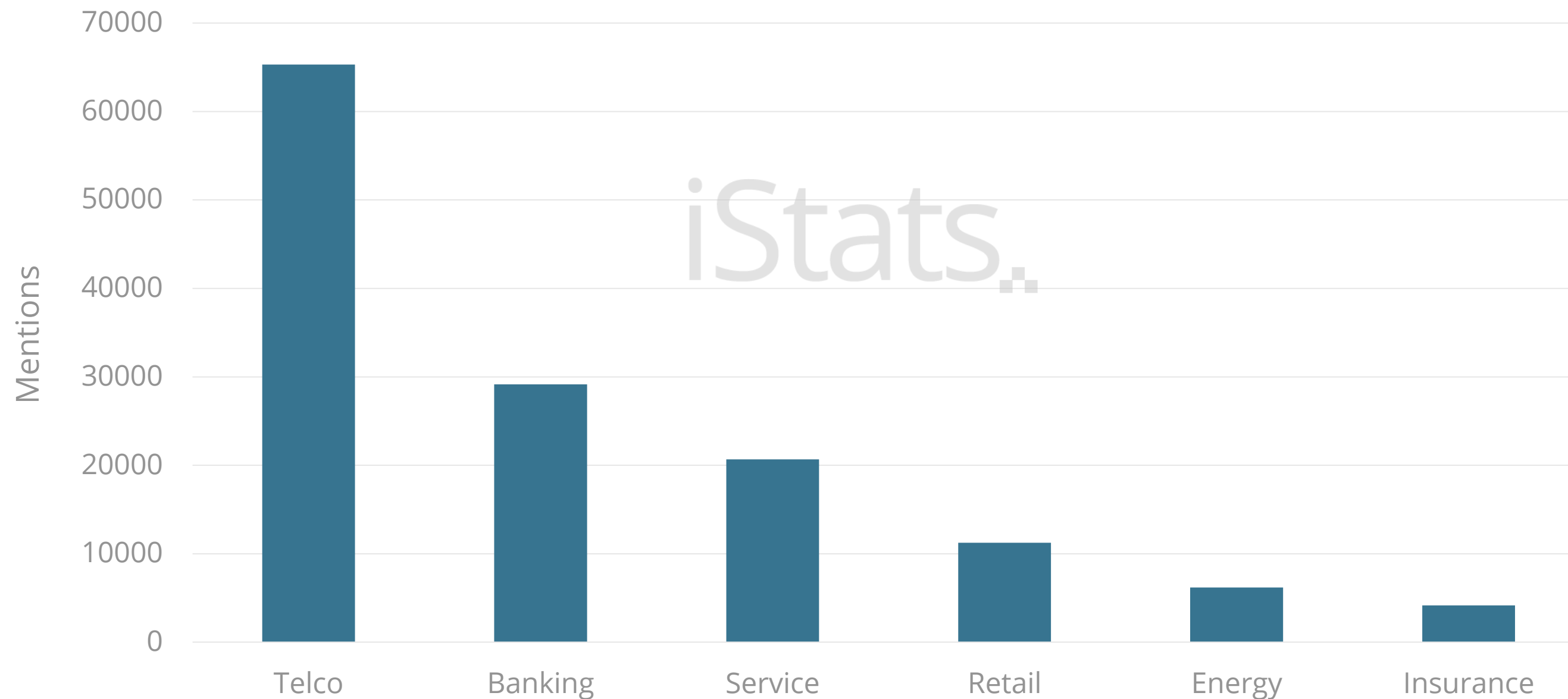
**Onto matters Insurance ...**



**Kenya has below 3% insurance penetration.  
Is Insurance fairing any better on twitter?**

# Not So Well Compared to Other Categories

Compared to Banking in particular, it is a long way behind in terms of both conversation and reach



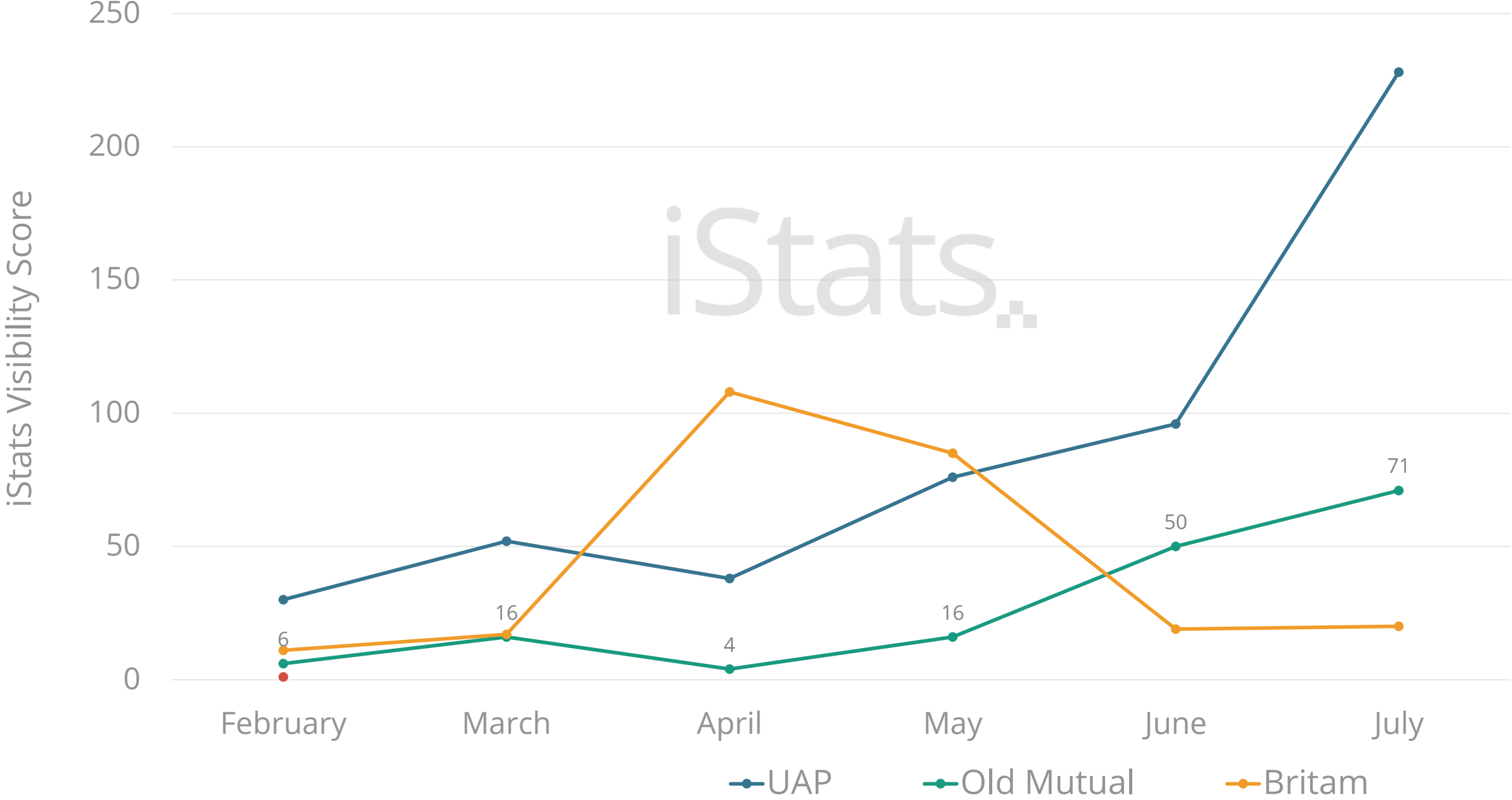
**Quite Some Ground to Cover For Insurance**



**But How Have Insurance Firms Fared Against  
Each Other In Last Six Months?**

# UAP Have Emerged Top By Quite A Margin

But Old Mutual is coming up slowly as well. Britam was on top during March to May period.



**Let's Talk Money. What About Banks?**



**Who Has Emerged Top?**

# KCB – And Has Been For A While



**01** KCB

**02** EQUITY

**03** CHASE

KCB has been dominating the banks for a few months now – according to data extending even past this specific research period

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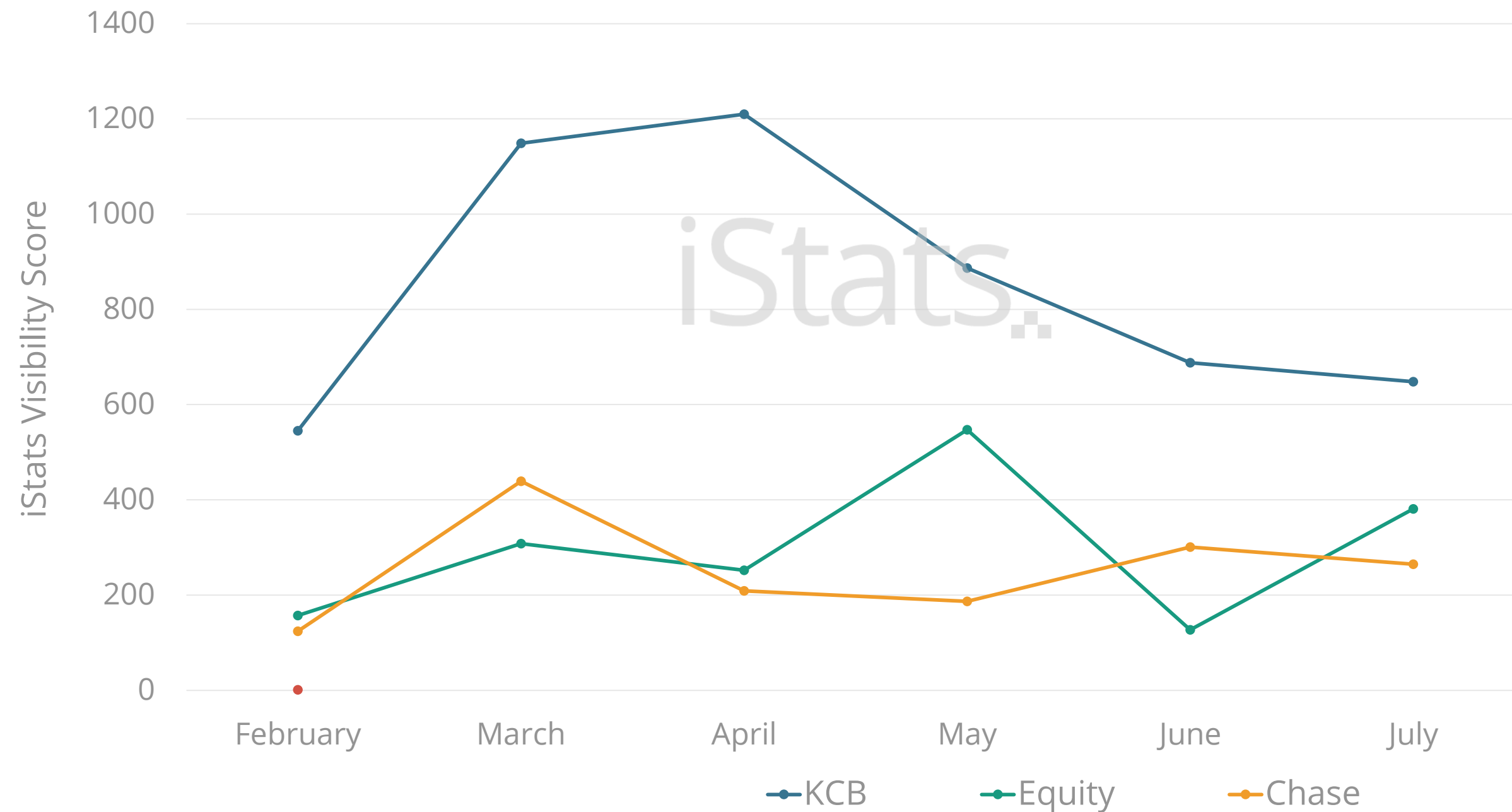
# How Far Is KCB Ahead Of The Rest



Let's Dig Deeper ...

# KCB Have Been Leading But Are Moving Downwards

KCB has dominated other players in banking on twitter but their mention and reach numbers have been moving downwards since April

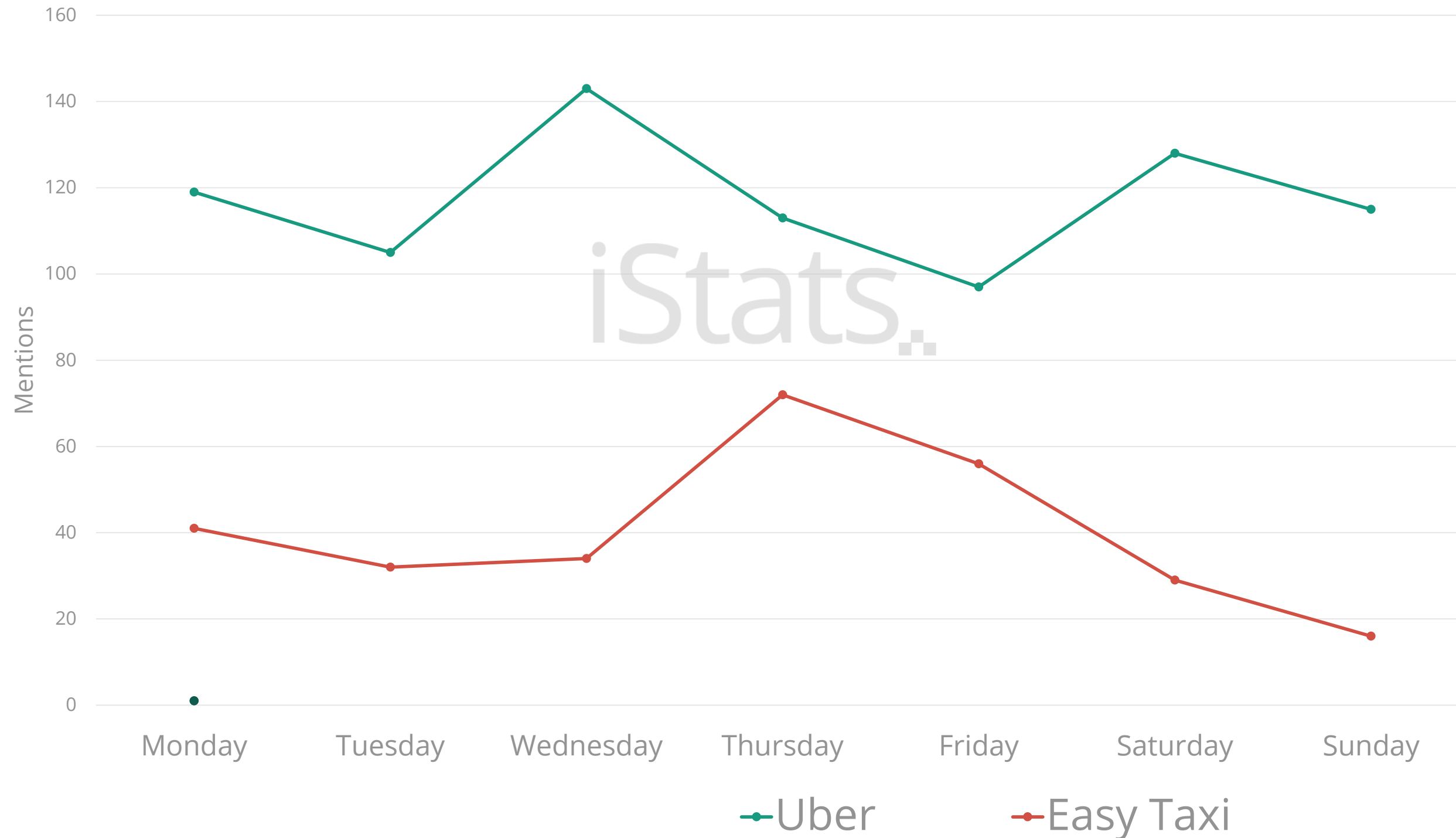




**Speaking of moving, how is the battle between  
EasyTaxi and Uber shaping up?**

# Well its an Uber On Top

The Graph Below Shows Total Mentions For Each Over The Research Period, Grouped By Day Of The Week





**What About Retail? Who's Leading?**

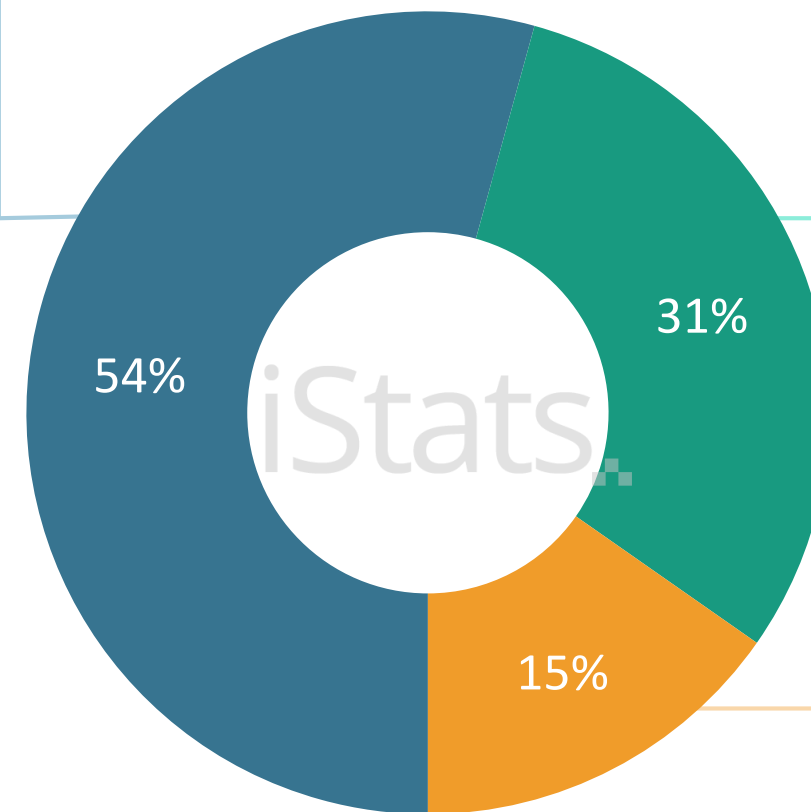
# Nakumatt Rules Retail

Nakumatt is ahead of rivals by quite a distance. Tusky's is however catching up



## Nakumatt

In firm pole position is Nakumatt. The retail giant eclipses all other retail players with mentions beating the closest competitor by 100% of the second placed entities mentions



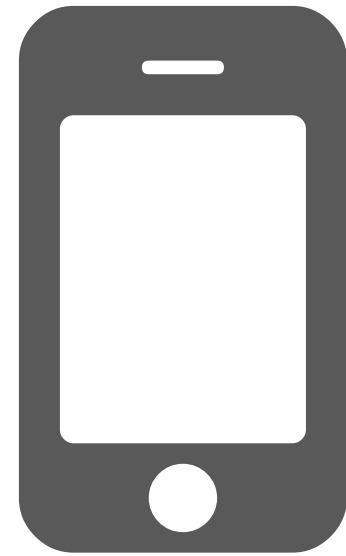
## Tuskys

Having joined twitter more recently than Nakumatt, Tuskys has made a strong presence on twitter getting about half of Nakumatt's overall reach



## Others

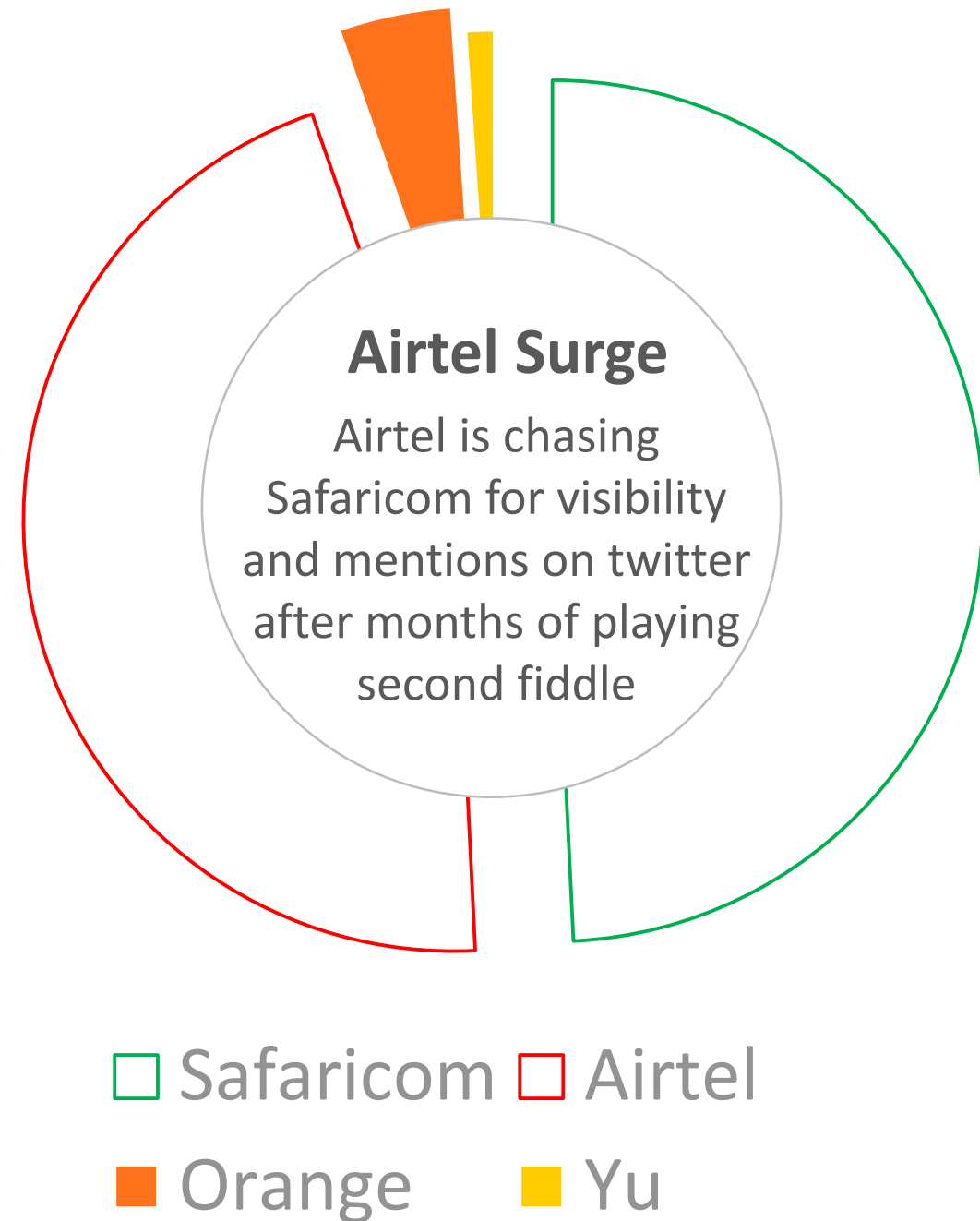
Other players in the space share the remaining 15%



**What About Phones? And Telcos?**

# Safaricom Leads But ...

Airtel is Hot On The Heels! Orange is some ... well ... *quite* a distance behind

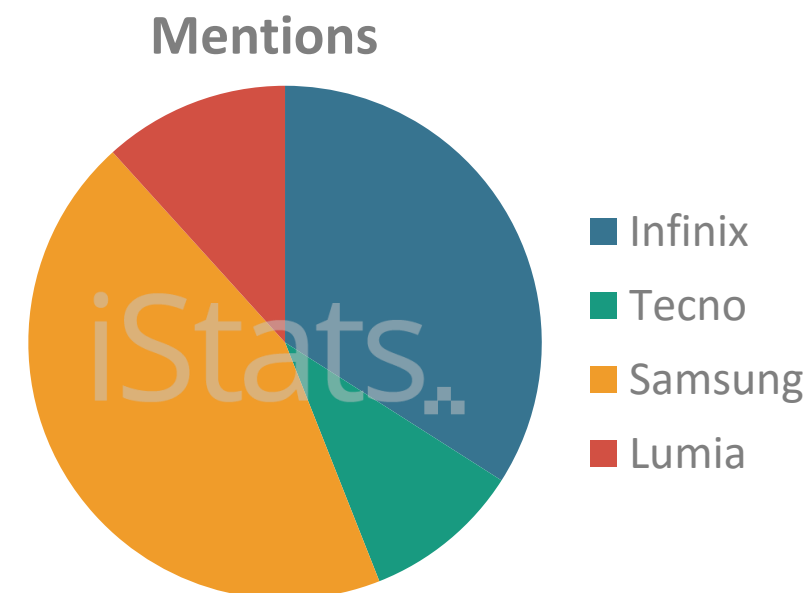


## Neck To Neck

Airtel (46% ) VS Safaricom (50%)

Also worth to mention that the mentions for the two telcos are dominated by customer service requests.

## PHONE BRANDS



**44%**

**SAMSUNG**

A Healthy lead for Samsung sees it surge ahead of competitors

**Infinix**

**One To Watch**

Infinix is second at 34% but has come very close to overtaking Samsung for data covering last three weeks



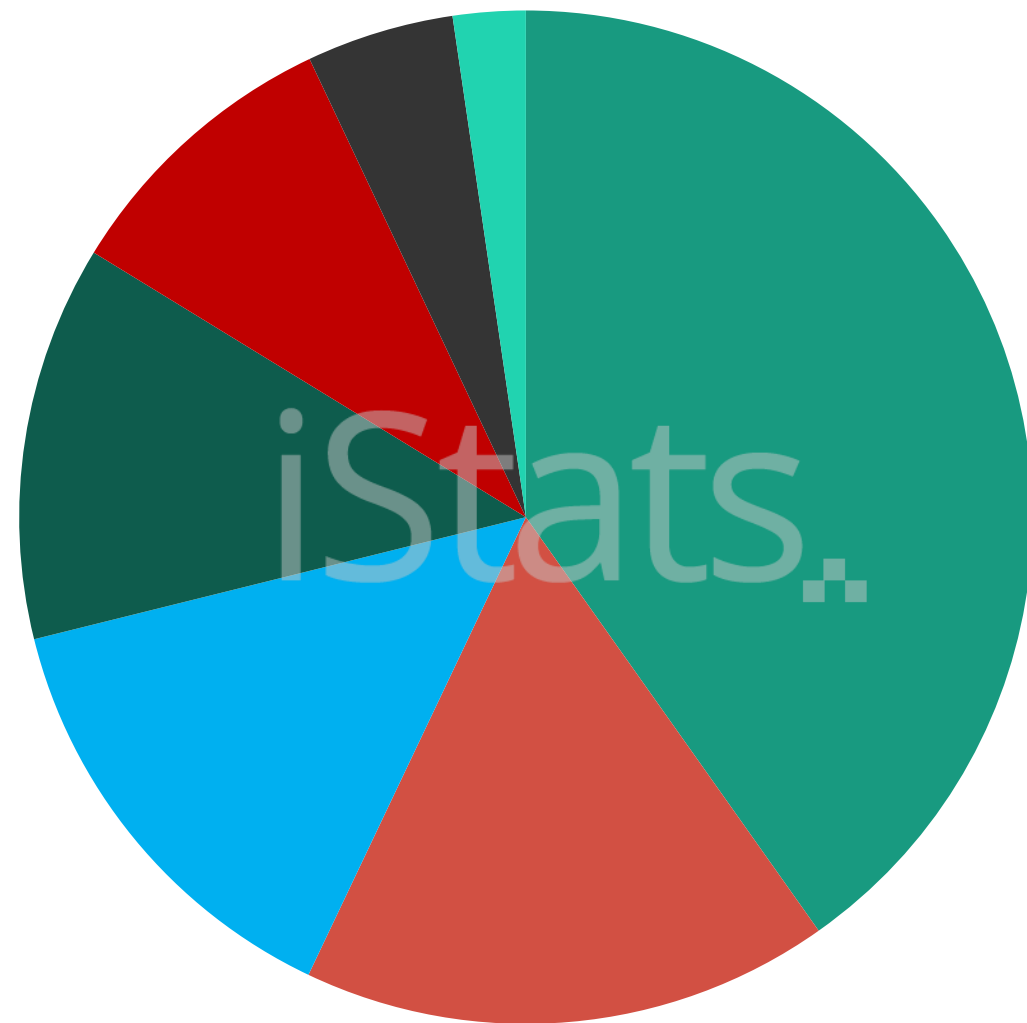


**Finally, let's reflect over a few drinks. Which is  
the Most Talked About Alcohol Brand?**

# It's a Tusker Country

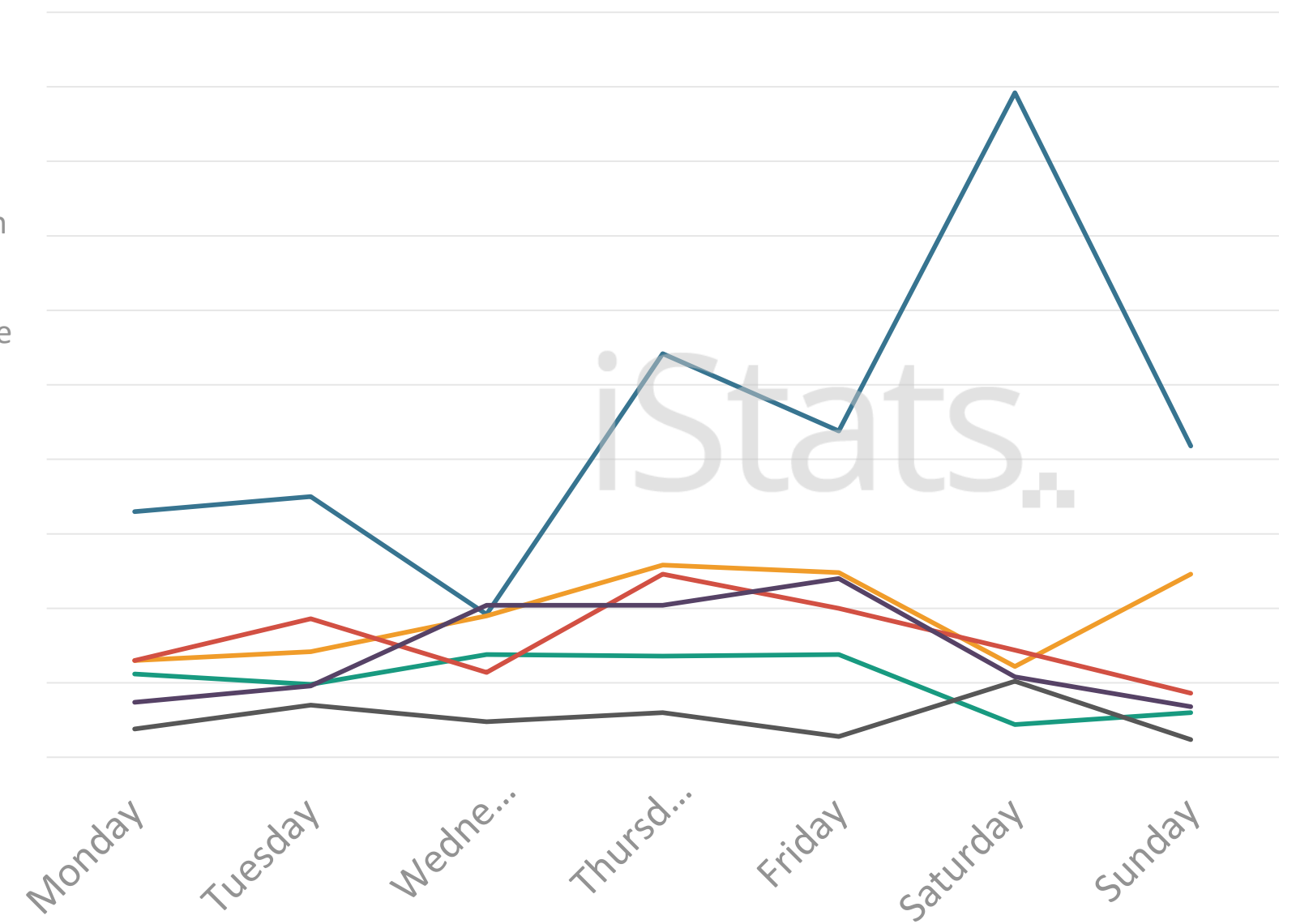
Tusker Leads the Pack followed by Carlsberg – which has seen lots of activity as a result of The Koroga Festival

## Mentions in Order



- Tusker Lager
- Carlsberg
- Heineken
- Smirnoff
- Jameson
- Tuskerlite
- Others
- Tusker
- Jameson
- Calsberg
- Heineken
- Smirnoff
- Tuskerlite
- Others

## Performance by day distribution



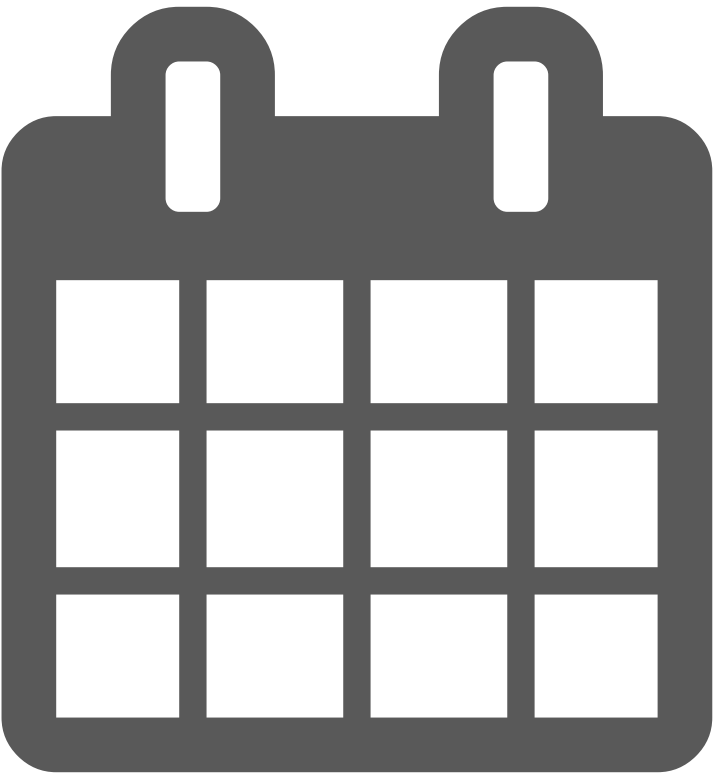
# Data Deep Dive

When Do Brands Get Most Engagement?

In this section, data collected is sliced and diced to see the times brands get the most mentions.



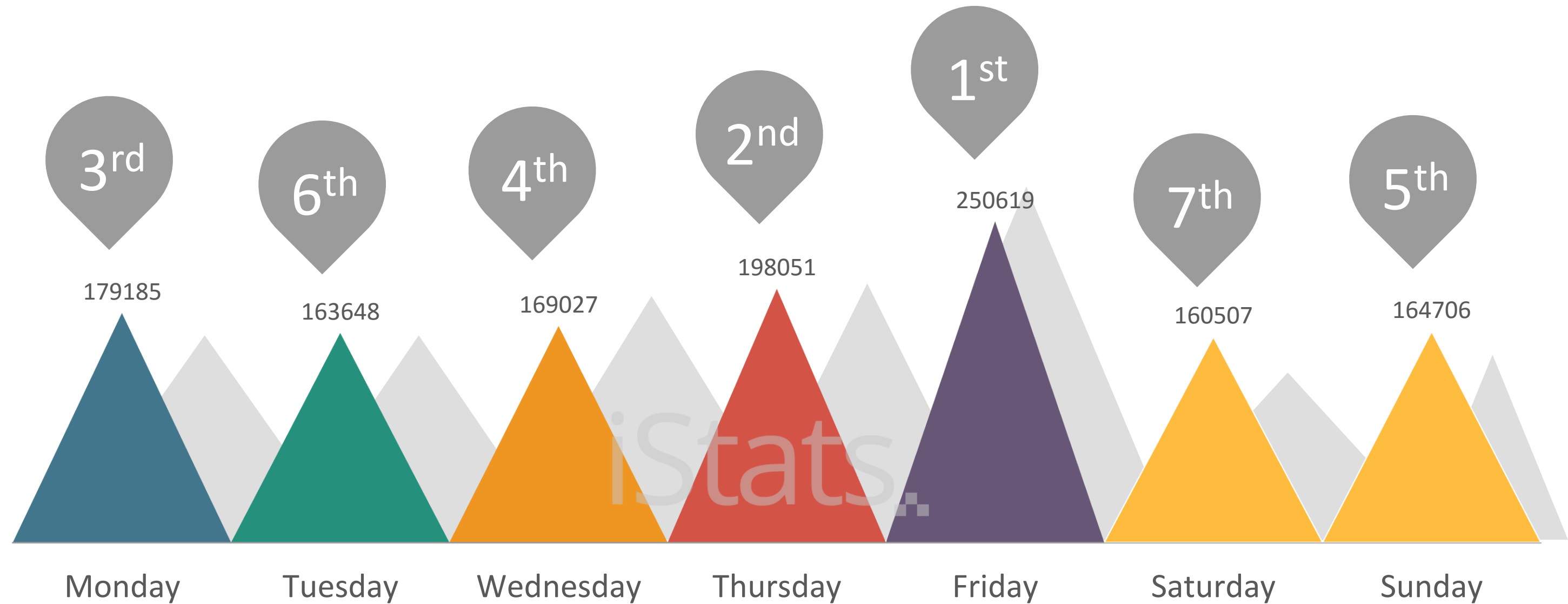
# Distribution By Day



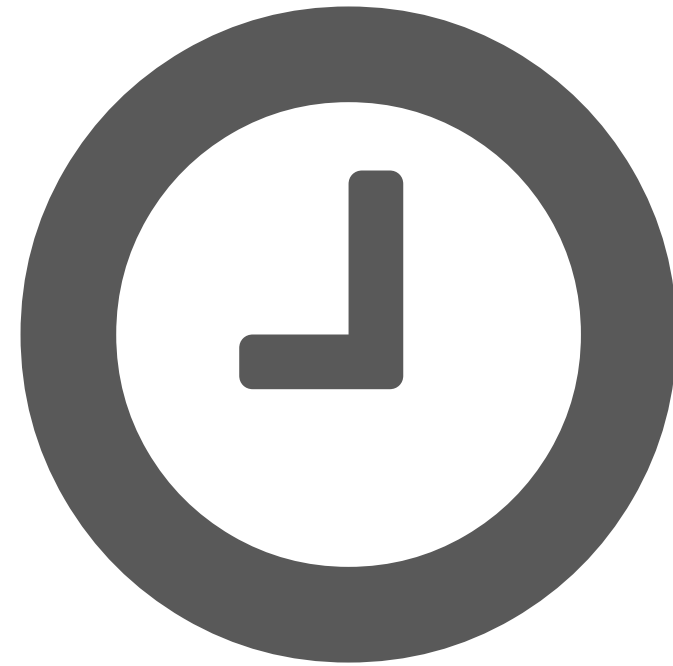
**Which Days Are Best For Brands**

# Which Days Do Brands Get Most Mentions?

Friday, Thursday and Monday are the outright winners over the duration of the research



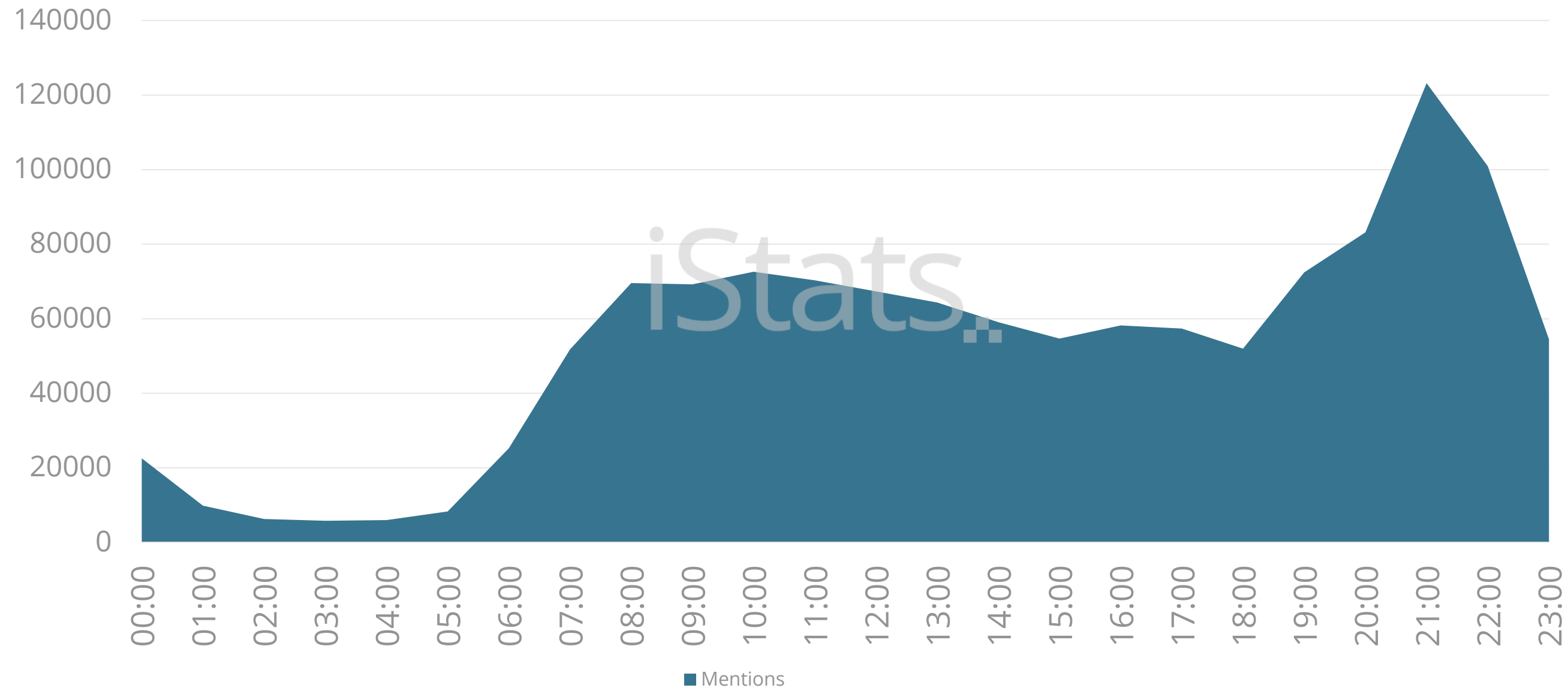
# Distribution By Time

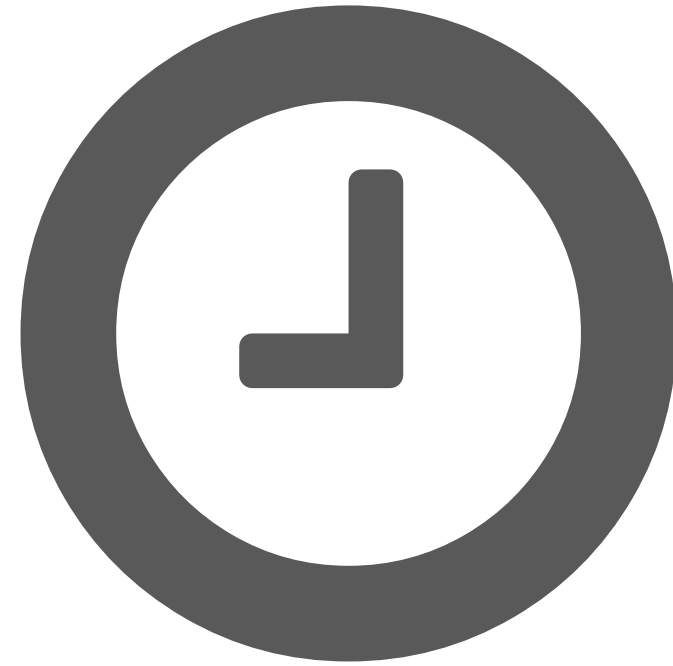


**Which Hours Are Best For Brands**

# When Do Brands Get The Most Mentions?

Peak times are 9:00am, 10:00am then the period between 7:00pm and 10:00pm



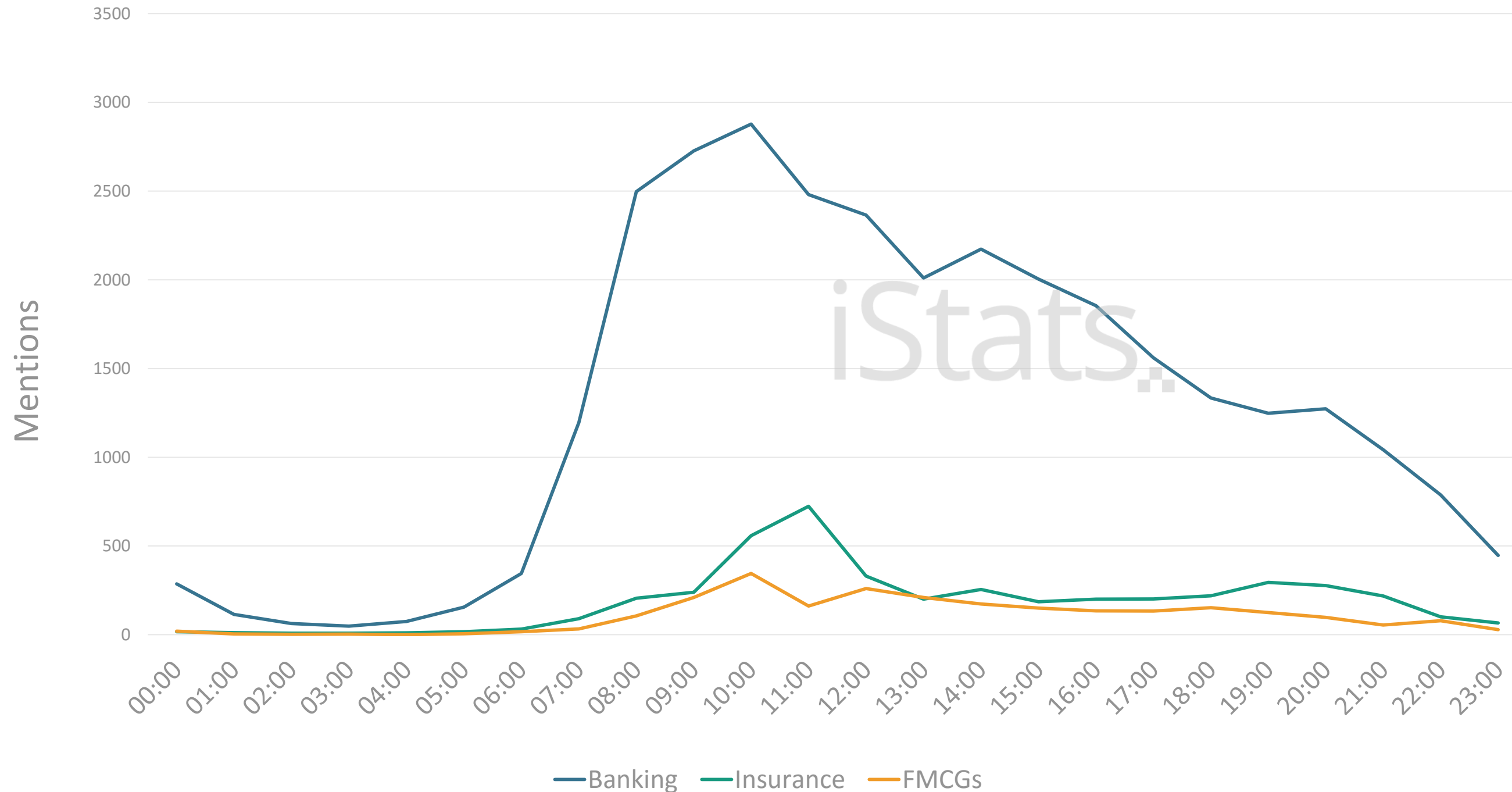


**Are Optimum Mention Times Uniform Across  
All Sectors?**

**Well ... *Not Quite***



# If Brands Were Human, Banks, Insurance firms and FMCGs would be morning people



## Banking

Steep rise between 6-7 am with a peak at 10:00am. Gradual decrease throughout the day

## Insurance

Insurance hits a peak at 11:00am and largely decreases though out the rest of the day

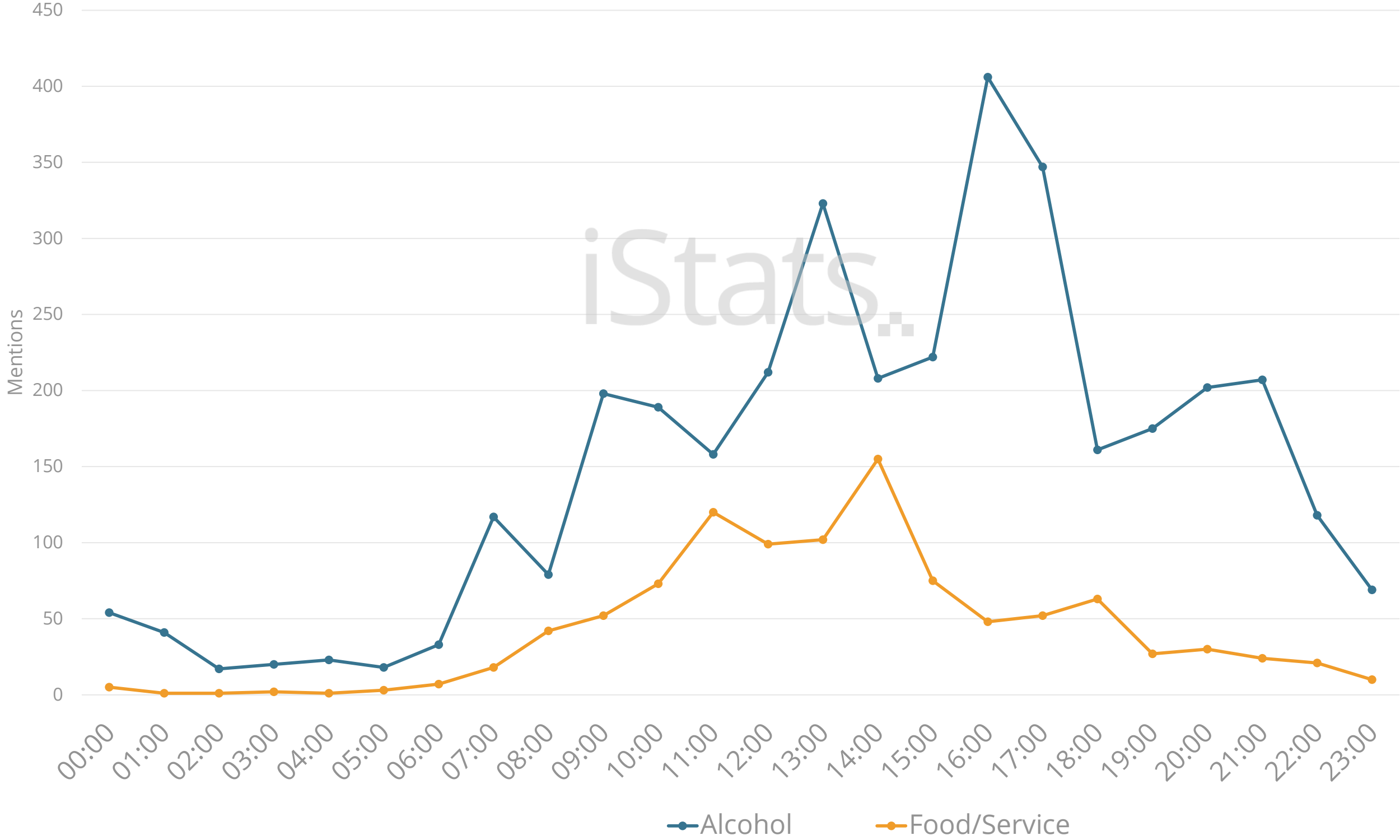
## FMCGs

Not much of a peak compared to most other brands but has its best time at 10:00am and at noon.



# Alcohol Is Not An Early Riser (no surprise there) Food Too.

Alcohol Peak Conversations happen around lunch hour and at between 4:00pm and 5:00pm

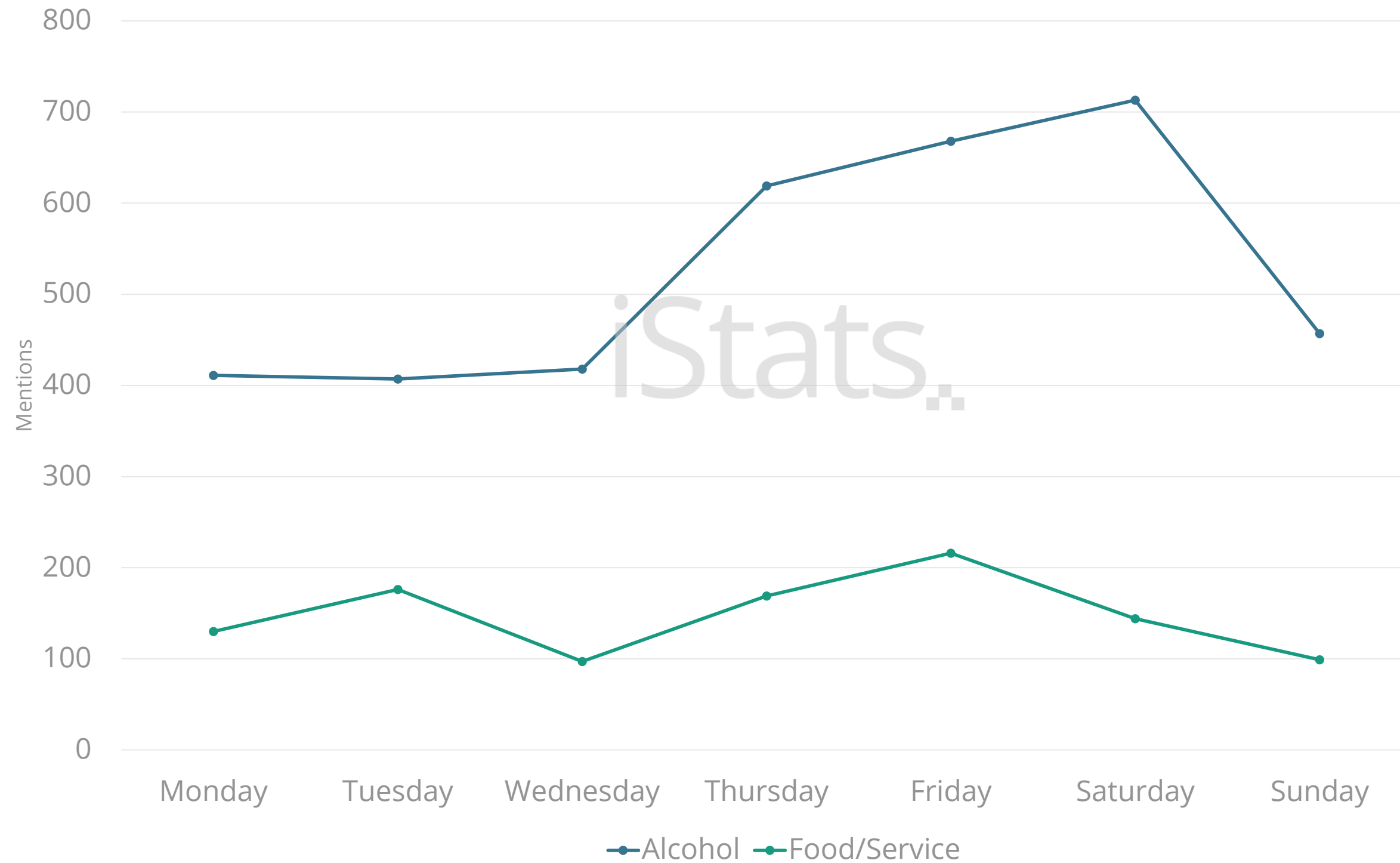




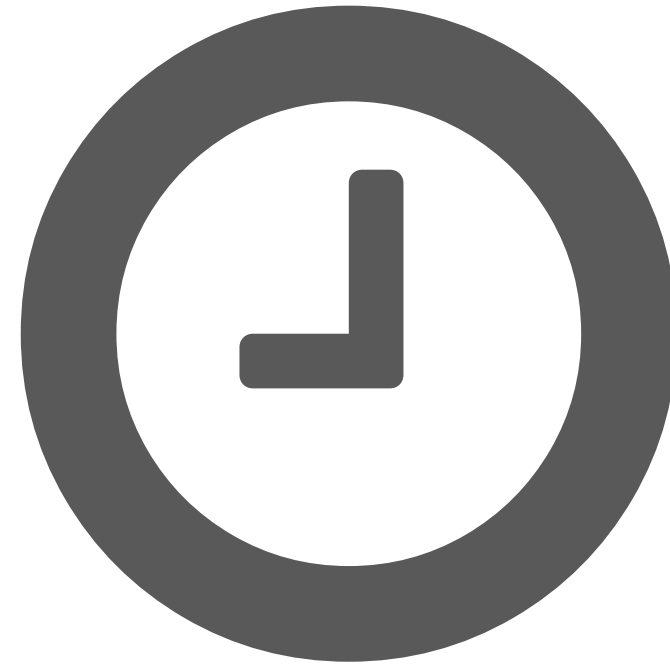
**So Alcohol hates mornings. Which Days Of The Week Does It Like?**

# It's all About The Weekend!

Alcohol conversations start picking up on Thursday and hit a peak on Saturday before a huge drop on Sunday



**That's All Folks! Or is it?**



**Well, Just A Few Quick Stats About iStats**



**7,195,207**

Total Tweets  
Collected



**419,163**

Users  
monitored



**95**

Brands actively  
tracked



**373,678**

Collected Links  
Mentioning Brands



**14**

Full time workers.  
12 are Bots





# THANK YOU!

Got a question? Need more data?\* Send an email right now to ...

[jack@istats.co.ke](mailto:jack@istats.co.ke)

Monitoring | Analysis | Planning | Strategy

\*Please note that data or additional analysis is available at a fee