

Sunday Times
GENERATION
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**methodology
paper
2016**

hd.
youthmarketeers



sample overview

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There are two components to the Sunday Times Generation Next Study:

Brand Preference (n=5 500):

The opinions of 5 500 young urban South Africans (aged 8-23) were polled to establish which brands are the Coolest of the cool in 2016 across 72 different categories. The questions are unprompted, asking "Coolest Brand", and then providing a list of brands, which the participant has to choose two.

Lifestyle & Consumer Behaviour (n=4 500):

This component of the study reveals key trends and consumer behavior patterns amongst young South Africans (Questions include: How would you like a brand to connect with you?; What are your plans for the future?; How do you express yourself most?). The results provide HDI with rich insight to help understand what makes young urbanites tick.

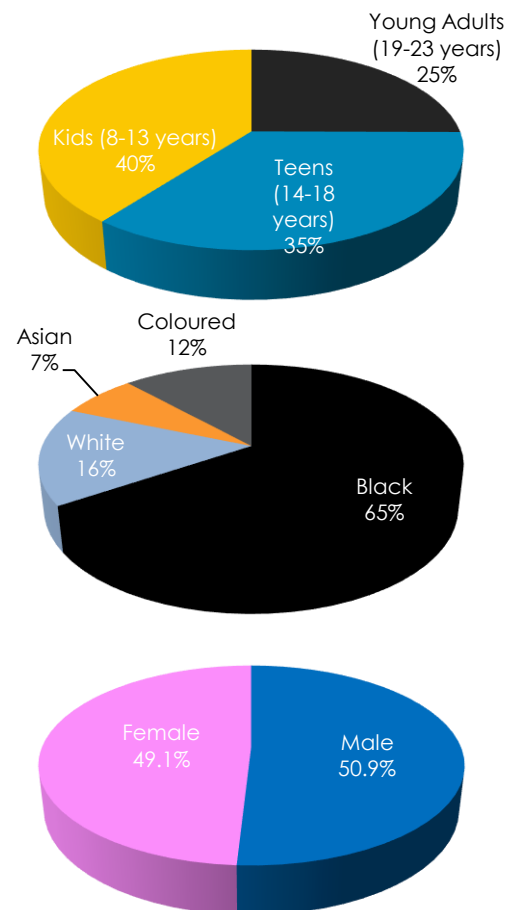


Table 1

Breakdown of weighted and unweighted sample					
Region	Polling	Lifestyle A	Lifestyle B	Lifestyle A & B combined	Weighted Percentages
Sample Sizes	5,500	2,233	2,267	4,500	100
Inland	58.6	51.8	49.3	50.6	49.8
Coastal	41.4	48.2	50.7	49.4	50.2
Kids	42.0	40.1	41.8	41.0	39.6
Teens	29.5	35.8	37.1	36.4	35.3
Young Adults	28.5	24.1	21.1	22.6	25.1
Black	62.6	52.4	48.6	50.4	65.6
White	14.7	21.2	22.9	22.1	15.8
Asian	9.6	11.2	11.9	11.6	6.9
Coloured	13.1	15.2	16.6	15.9	11.7
Male	45.1	42.0	46.8	44.4	50.9
Female	54.9	58.0	53.2	55.6	49.1

in detail

Introduction

Keeping track of how youth interact with, and respond to brands is an ongoing process. Now in its twelfth year, the *Sunday Times* Generation Next Study is the leading annual youth brand preference and consumer behaviour survey. There are two components to the overall study, the first which focuses on brand preference and the second which focuses on lifestyle and consumer behaviour.

Data collection took place between January and March 2016, concentrating on urban and peri-urban environments in six provinces, namely; Eastern Cape, Free State, Gauteng, KwaZulu-Natal, Mpumalanga, and the Western Cape. The Northern Cape was excluded because of the almost non-existent urbanised youth in the province, as was the Limpopo province. Each year, the study alternate between the North West and Mpumalanga Provinces, as to include three inland and three coastal provinces.

The intense research analysis is conducted by HDI Youth Marketeers and a commissioned research principal. Highlights are published by media partner, Sunday Times.

Brand preference

The brand preference component of the study polls the opinions of young people (ages 8-23) to establish which brands they think are the coolest across 72 different categories. This year's poll consisted of 5 500 respondents, representing age groups 8-23, six provinces, balanced between coastal and inland, males and females and inclusive of all race groups.

Lifestyle and consumer behaviour

The second component of the study is conducted simultaneously (with a similar demographic sample) and requires respondents to reflect their attitudes as young consumers and is aimed at getting a grip on youth habits and behaviour.

This section of the study is split over two questionnaires, in order to avoid respondent fatigue, and to ensure that we can probe deeply into many facets that give us an in-depth perspective into the psyche of this dynamic market segment.

Our approach yielded approximately 2 250 responses in each of the two parallel studies, and allows us to increase the sample size on critical information such as spending patterns, which was included in both questionnaires, to just over 4 500 observations.

the youth profile

Together the sub-segments of the South African consumer market referred to in the study represent a significant portion of the country (more than 50% of the population is 24 or under). The definitions used are:

- Kids: Primary school learners, ages 8-13 years
- Teens: Secondary school learners, ages 14-18 years
- Young Adults: Youth who have completed their schooling, ages 19-23 years

Based on statistics released by the Department of Education in *Education Statistics in South Africa 2014* and according to Department of Higher Education and Training figures, the total target population for the purpose of this study is constituted as shown in Table 2. Based on these documents, there are currently approximately 13,3 million individuals enrolled in primary, secondary and tertiary institutions in South Africa in the 8-23 year old segment, across all nine provinces.

It is important to understand that the youth included in this study are from urban and peri-urban communities. The youth polled in this study are exposed to the media and have access to media channels.

Three-phase methodology

1. Shortlisting phase

The first phase of this research study is conducted with approximately 400 young people (ages 8-23) in the major cities across South Africa to identify which brands are the coolest of the cool. This process relies on spontaneous mentions and results in a comprehensive listing of top-of-mind brands that young people have identified as being the coolest in their particular category. From this, each category is shortlisted into a listing of top brands (number dependent on the category) that feature on the final questionnaire sent into field in the quantitative research phase. The final questionnaire has three different questionnaire rotations, where the brands are listed in different orders.

2. Quantitative phase

The second phase of the research is conducted in urban and peri-urban schools, universities and colleges across the country (see sample break-down in table 2). The number of schools and numbers of learners per school was determined proportionally to the population distribution estimates shown in Table 2.

In total, 50 sessions were facilitated by HDI Youth Marketeers for an in-depth face-to-face data collection process that was conducted with groups of youth. The breakdown of primary/secondary/tertiary institutions visited was 22/19/9. In addition, we briefed 30 teachers (all of whom were selected on the basis that they already have an existing relationship with HDI Youth Marketeers' School Liaison Officers) to conduct the brand preference questionnaire with their learners.



These teacher-facilitated classroom sessions yielded just over 1 618 primary and high school respondents. HDI Youth Marketeers recognizes the valuable contribution made by the participating schools and ensures that each school is rewarded for their effort and the time spent with the learners.

3. Qualitative phase

The third phase of the research is conducted during sessions with a selection of Kids, Teens and Young Adults.

These sessions highlight what young people identify as being significant issues unfolding in their peer circles and document why they prefer particular brands over others. These verbatims add insight to the quantitative report findings which enhance the report writing process.

Table 2

The target population and sample achieved						
	Primary	High	Tertiary	Total	Total Primary, High and Tertiary Population (%)	2016 sample composition by province (%)
Eastern Cape	760 318	638 519	87 009	1 486 146	17.5	8.9
Free State	256 653	247 804	48 764	553 221	6.5	14.1
Gauteng	800 092	769 289	310 675	1 880 056	22.1	34.9
KwaZulu-Natal	1 055 645	1 103 930	153 592	2 313 167	27.2	16.3
Mpumalanga	401 966	424 512	31 531	1 374 843	16.2	6.0
Western Cape	415 414	360 144	128 244	903 802	10.6	19.8
Total	3 690 088	3 544 198	759 815	8 511 235	100.0	100.0

It is estimated that the provinces included in the target population, have 72.8% of all primary school learners in the age group 8-13 years, 78.5% of all secondary school learners aged 14-18, and 81.2% of tertiary students. Therefore, the exclusion of these two provinces is not seen as a serious threat to the representativeness of the youth in South Africa in the final sample.

The estimates of primary and secondary school learners in Table 2 excludes learners in Grade 1 and Grade 2, as well as special needs schools (as these samples were omitted from the current study). The primary strata in this survey are firstly the type of institution, and secondly the seven provinces that are included in the study. The achieved sample was 5 500 for the polling study and the split number of learners was 42.0% primary school learners; 29.5% secondary school learners, and 28.4% students from tertiary institutions. The sample size of 5 500 yields an overall precision of approximately 1.6% using a 95% confidence level on estimated percentages. It should be noted that the precision levels have been determined under the assumption of a random probability sample, and it can therefore be underestimated.

In this study, sampling is not strictly speaking a probability random sample. However, considerable care is taken to ensure that the sample is representative of the youth in South Africa within practical, financial and time constraints. Representativeness is planned according to geographical, race, gender and age variables, and the distribution of the demographic characteristics in the sample are aimed to be proportional to the distributions of population estimates obtained from the community based survey results published by Statistics South Africa (2008) (for data trending purposes). Since this study is a trend study, results are weighted to match the urbanised youth profile of our previous studies, using urbanisation ratios published by the HSRC.

Ethical principles of informed consent, anonymity and individual preferences to opt out of the study were adhered to at all times during the data collection process.

The major drivers of significant differences in the study are age, race and gender differences, with several significant interactions between these three variables.

Note: coolest brand overall category

Consistent with the methodology followed from 2009 to 2015, the Coolest Brand Overall winner is determined from the top three winners in eight categories, namely Coolest Cellphone; Coolest Clothing Store; Coolest Clothing Brand; Coolest Motor Vehicle; Coolest Hi-Tech Gadget; Coolest Computer Brand; Coolest Fast Food Place and Coolest Cold Drink. The selection of the eight categories is based on the importance of these categories to the youth. The delphi (or difference) between the actual and expected percentages are calculated, squared, and expressed as a ratio of the expected percentage based on the number of brands listed in each category. This ratio is also known as a chi-square distance. Finally, across the top three winners in the nine categories, a total of 24 chi-square distances are calculated. These figures are sorted from the highest to the lowest and duplicate winners are eliminated. Once the top ten brands have been identified, the chi-square distances are added and expressed as percentages adding up to 100, to determine the top 10 Coolest Brand Nominees.

References

Statistics South Africa, 2008. Community Survey 2007, Interactive data in SuperCROSS, ISBN 978-0-621-37743-9.

Department of Basic Education, 2014. Education Statistics in South Africa 2014.

