Sunday Times

GENERATION NEXT 2014

BRAND YOUTH

Methodology 2014

Sunday Times

Waltons Breeding success

youthmarketeers

sample overview

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

Brand Preference:

The opinions of 5 675 young urban South Africans (aged 8-23) were polled to establish which brands are the Coolest of the cool in 2014 across 72 different categories

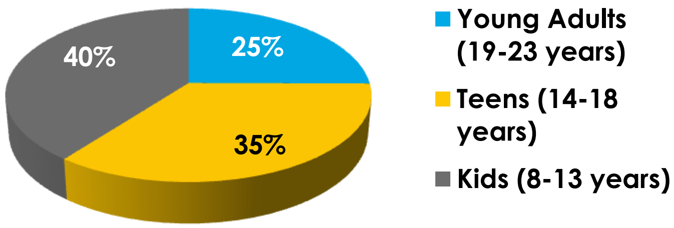
Lifestyle & Consumer Behaviour:

This component of the study reveals key trends and consumer behavior patterns amongst young South Africans (Questions include: What do you think of recycling?; What inspires you to exercise?; How do you express yourself most?). The results provide HDI with rich insight to help understand what makes young urbanites tick.

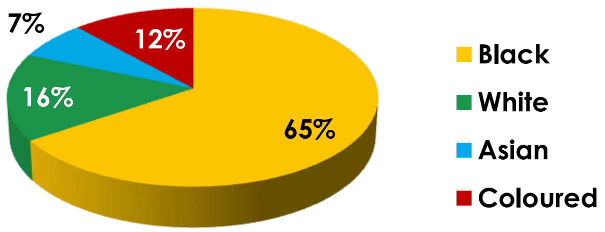
Brand Preference/Polling sample: n=5 675

Lifestyle & Consumer Behaviour sample: n=2 347 + 2 275=4 622

age breakdown



race breakdown



gender breakdown

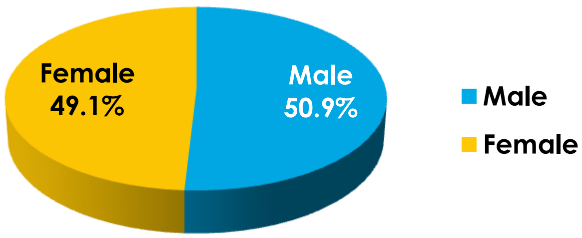


Table 1.

Breakdown of weighted and unweighted sample					
Region	**Polling**	**Lifestyle A**	**Lifestyle B**	**Lifestyle A & B combined**	**Weighted Percentages**
Sample Sizes	**5,675**	**2,347**	**2,275**	**4,622**	**100**
Inland	53.4	45.7	48.1	46.9	49.8
Coastal	46.6	54.3	51.9	53.1	50.2
Kids	40.8	40.7	39.4	40.1	39.6
Teens	31.7	31.7	35.4	33.6	35.3
Young Adults	27.5	27.6	25.2	26.4	25.1
Black	50.6	52.5	55.0	53.8	65.6
White	19.4	21.4	18.8	20.0	15.8
Asian	12.0	11.4	10.7	11.1	6.9
Coloured	18.0	14.6	15.5	15.1	11.7
Male	40.4	42.0	43.8	42.9	50.9
Female	59.6	58.0	56.2	57.1	49.1

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in detail

introduction

Keeping track of how youth interact with, and respond to brands is an ongoing process. Now in its tenth 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 February and March 2014, concentrating on urban and peri-urban environments in seven provinces. The Northern Cape was excluded because of the almost non-existent urbanised youth in the province, and Mpumalanga partly because this market being similar to that of the Limpopo province.

The intense research analysis is conducted by HDI Youth Marketeers in conjunction with academic validation partner, Monash South Africa, 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 exceeded 5 675 respondents, representing age groups 8-23, seven 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 the same 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 2 300 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 4 600 observations.

who are youth?

Together the sub-segments of the South Africa consumer market referred to in the study represent a significant portion of South Africa (more than 50% of the population is 23 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 2012* and according to Department of Higher Education and Training figures (2010), 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.

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, 53 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 22/18/13. In addition, we briefed 60 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 1 600 primary and high school respondents. HDI Youth Marketeers recognises 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 (%)	2014 sample composition by province (%)
Eastern Cape	760 318	638 519	87 009	1 486 146	17.9	14.0
Free State	256 653	247 804	48 764	553 221	6.4	11.7
Gauteng	800 092	769 289	310 675	1 880 056	18.1	34.4
KwaZulu-Natal	1 055 645	1 103 930	153 592	153 592	25.7	13.7
Limpopo	604 051	716 953	53 839	1 374 843	15.4	0.2
North West	311 864	268 299	90 734	670 897	7.0	3.4
Western Cape	415 414	360 144	128 244	903 802	9.5	22.5
Total	**4 204 037**	**4 104 938**	**872 857**	**7 022 557**	**100.0**	**100.0**

It is estimated that the provinces included in the target population, have 89.1% of all primary school learners in the age group 8-13 years, 89.3% of all secondary school learners aged 14-18, and 94.3% 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 5 675 and the split number of learners was 40.8% primary school learners; 31.7% secondary school learners, and 27.5% learners from tertiary institutions. The sample size of 5 675 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.

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). 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.

special mention: coolest brand overall category

Consistent with the methodology followed in 2009, 2010, 2011 and 2012, the Coolest Brand Overall winner is determined from the top three winners in nine 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. Education Statistics in South Africa 2012.