



tensions, tribes & trends



Foreword

Welcome Gen Z The first global generation

Today's young buyers value authenticity above all else, writes Refilwe Maluleke

'What do we want? A world worth inheriting' — Tanith M, 12 years old, junior board of directors at Yellowwood

020 has taken the world by storm and the youth are no exception. What began as a typical year for the annual Generation Next survey was turned upside when, shortly after our infield research was conducted, SA went into lockdown. Having analysed these results in a whole new context, we found that many of the insights were only deepened by the pandemic.

Move over millennials and welcome Gen Z – arguably the world's first truly global generation. Unlike Baby Boomers (born 1944 -1964), Generation X (born 1965 1979) and Generation Y/millenials (born 1980 - 1994), Generation Z (born 1995 - 2015) are far more likely to resemble their global counterparts. Technology has ensured that these digital natives have shared interests, influences and experiences.

In some respects, this makes the job of a marketer easier as global trends are far more likely to have local relevance, but they are a more complex youth living in a more complex time which presents a different set of challenges. Tribes,

trends and tensions are a useful way to explore the elements shaping these bright young lives.

TRIBES

Digital natives identify with tribes more than any other demographic group before them, and hate being typecast into any one particular tribe. Tribes are brought together through shared passions and transcend borders, background and biography.

A tribe that has emerged in 2020 has been that of youth social activism. What defines this tribe is the desire to address social challenges. combined with the ability to relate to broader audiences and leverage off their experiences to find solutions for localised communities.

Making a difference and changing the direction of the world is the key driver of this tribe. Brands that connect me to my tribe, form a part of my tribe, and champion my tribe, will find resonance with the youth and build brand love.

TRENDS

Two of the most meaningful trends the research highlights are access to (too much?) information and a need for empathy.

From mother knows best to Google knows best. As the first generation of digital natives, children of

all ages have daily access to technology and the world of endless possibilities it presents. This means they no longer need to go to a parent, teacher or sibling for answers to questions: they simply Google it, which presents distinct advantages and disadvantages.

The most significant advantage is that a child's world is no longer constrained by what those around and parents alike.

In a more digital and interconnected world where any one crisis or movement affects us all, the ability to meaningfully connect with others and care about their challenges has more value than ever before.

The pandemic has intensified this need for empathy as lockdown forces us into isolation and the youth lose the one space they could rely on to meaningfully engage with their peers – school. Kindness, bravery and vulnerability are valued beyond coolness, and premium brands are those with substance. Brands can respond to our need for deeper, real-life, person-to-person connection.

TENSIONS

The greatest tension in SA youth today is linked to their desire (and the pressure they feel) to succeed. Youth have consistently told us that they have big dreams, largely of being their own boss, and a clear understanding that education is the key to get there.

The most popular answers to questions about what they want most and what they would save money for is education, particularly amongst teens. The tension for many is that they simply cannot access the kind of high-quality education that would enable them to achieve their dreams.

Brands can respond by recognising this tension and finding simple, inclusive ways to help the youth overcome it.

What do the youth value most in a brand? Our research tells us time and again: authenticity, authenticity, authenticity. As these young people navigate the complexity of a rapidly changing world and figure out who they are, what they value and the kind of adult they want to be; all they ask is that brands be exactly who they say they are, every day, everywhere, with everyone.







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Foreword

Value shift Purpose, not profit

Today's youth want brands to show they care, says **Eben Gewers**

ow in its 16th year, the Sunday Times Gen Next survey is considered to be the leading barometer of what SA's youth find on-trend and aspirational. The survey – which focuses on SA youth between the ages of 8 and 23 – delivers valuable insights for brand managers, advertising and marketing professionals.

Making up more than a third of the country's population, the youth are an influential sector of the market. Having surveyed the opinions of 6,000 youth across the country, this year's survey results serve as the most accurate pre-Covid-19 snapshot of youth brand perception, providing marketers with a unique benchmark for measuring attitude shifts postlockdown.

This year's survey focused on the themes of tribes (those consumers united by a common interest), tensions (in society) and trends (that influence consumer mindsets). A fitting theme for an unprecedented year.

The Covid-19 pandemic has been an opportunity for brands to live their purpose with communication that is empathetic, authentic and which focuses less on self-promotion and more on how the brand is helping to make a positive difference.

There is little doubt that brands that are deemed to have taken advantage of consumers during the pandemic will suffer a backlash.

Today's youth – perhaps more than any other generation previously – demand that brands



Eben Gewers, head of sales & advertising at Arena Holdings.

have a social purpose. This needs to extend beyond merely making a profit. A minority of brands are getting it right while the majority appear to still have some way to go.

Increasingly, the youth are rejecting advertising messages that are not authentic and calling out brands that behave contrary to their

stated purpose. Brands underestimate the power of their voice at their peril.

The survey also measures youth perceptions of the personal brands of sports and entertainment celebrities as well as online influencers. High-profile individuals such as sports stars, musicians, actors and influencers play a huge role in youth culture. It has been interesting to see who stepped up to the plate as role models during the Covid crisis.

Social media platforms have taken centre stage during the pandemic, providing friends and families separated by the lockdown with a means of connecting. The position of the most dominant platforms has remained largely unchanged for the past two years. Whether this will remain the case in 2021 remains to be seen.

Esports and gaming were on the rise even before the pandemic but undoubtedly received a significant boost during the lockdown as people looked for alternative forms of entertainment while restricted to their homes. Online gaming was a way for people to connect with others through titles such as FIFA – voted this year's Coolest Console/Computer Game – Grand

Theft Auto and Need for Speed. A growing number of the youth are now playing or watching gaming content in the absence of traditional sporting events, which should encourage more brands to support these platforms.

International brands have long been category winners in the Gen Next survey, revealing their consistent appeal to the youth market. Local brands will be hoping that the youth give their support to them as they struggle to recover in Covid's aftermath.

In an era of fake news, the value of quality news and media has never been more important. For more than a century the Sunday Times has been a trusted source of news for South Africans. It remains, to this day, the best-selling news title in the country. It's a brand that clearly resonates with the youth, once again winning the Coolest Weekly Newspaper category.

We are delighted to be able to share the results of the 2020 Sunday Times Gen Next survey and extend our sincere thanks to Yellowwood (which has incorporated our survey partner HDI Youth Consultancy into its fold) for conducting this survey on our





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Retail rewired

Online shopping Building trust in the system

Brands will need to invest in the customer relationship post-Covid to maintain online sales

By LYNETTE DICEY

nline shopping habits particularly among those aged between 18 and 24 – skyrocketed once the lockdown had been implemented in SA, according to figures released by PayFast.

The Covid-19 pandemic has accelerated the adoption of online shopping, though the path to purchase is following the same generic pattern of purchase behaviour of online: browse, compare, refer, then hit the click to checkout, says Nick Terry, CEO of TMARC, a digital consumer engagement company.

The length of the pandemic will determine how much these changed behaviours are retained, he savs.

The pandemic accelerated the e-commerce boom by about three years, says Sherbet Youth Agency

MD Lara Petersen. "Before the lockdown the youth were quite wary to buy online but now that they've been coerced into buying this way they have realised the convenience and built trust in the system," says Petersen.

A positive by-product of the pandemic, she adds, has been the way in which many retail brands have been reactively proactive in terms of offering an online solution and giving cognisance to an omnichannel style strategy which, as a country, SA has tended to be several years behind.

"Click 'n collect has enabled an easing into online shopping, with a merging of the convenience of online shopping with the perceived security of 'brick and mortar' stores." She predicts that the online trajectory will even out post this initial spike. It will then be up to brands to invest in the relationship, rather than the sale, to maintain online sales.

"Brands need to know their customers, particularly the youth. There are so many missed opportunities to tap into the data brands have at their disposal to create a more targeted, and thus more effective, consumer



Clicks's growth in its online business has accelerated with lockdown.



communication strategy."



Those brands which already had an established online presence have benefited in the past few months, including retailers such as Clicks, this year's winner of the Coolest Specialist Health, Beauty & Accessory Store in the Sunday Times Gen Next survey.

Since introducing an online store in 2016, Clicks has experienced rapid growth in this area of their business, which has been further accelerated by Covid-19.

Clicks chief commercial officer Rachel Wrigglesworth says convenience and accessibility are a cornerstone of Clicks's strategy given that its stores are now within 5km of 50% of homes in SA.

"Our brand promise of 'You pay less at Clicks' is built into the company's DNA. Not only does this promise enable us to be accessible but we are deliberate about choosing product ranges that meet all our customer's needs, selecting ranges to offer exclusively and ensuring customer service."



Rachel Wrigglesworth, Clicks.

Bongani Chinkanda, MD of youth specialist agency Bravado, says the Clicks brand resonates with the youth market because it is aspirational while still being accessible. "Clicks has cornered the health and beauty segment of the market in a way that its competitors have just not managed to do.

Other brands which have benefited from the growth in online shopping include Takealot and Mr D Food, the latter taking top spot in the Coolest Food Delivery App category. However, not all retailers managed to successfully upscale their online delivery offering sufficiently to meet the increased demand posed by the lockdown. Winner of this year's Coolest Grocery Store category, Woolworths, for example, has battled with a significant backlog of orders in many parts of the country.

'Consumers will forgive brands for the challenges they face due to a sudden and unexpected shift in their operations," says Petersen.

"However, what the youth won't



Nick Terry, TMARC.

forgive them for is not managing their expectations in terms of back orders, delays and errors. More often than not, it's not the delays that annoy people but the silence.

"Customer communication is key. The youth are a highly engaged and interactive brand audience. As such, they want their queries and complaints to be heard and resolved or they will take to social media and slam you for it."

The future of retail is less likely to be a choice between online or offline but rather a merging of the two, predicts Chinkanda. That means that brands wanting to appeal to the youth need to adopt a multi-channel approach which incorporates both mobile and digital platforms as well as traditional platforms such as TV and radio.

The Sunday Times Gen Next study, established in 2004, is SA's leading annual youth brand preference and consumer behaviour survey, polling over 5,500 youths aged 8 to 23.



Why local is not always lekker

The youth's obsession with international brands appears to be ongoing if the results of this vear's Sunday Times Gen Next results are anything to go by.

Nike continues to inspire the youth, winning the Coolest Clothing Brand, Shoe/Footwear Brand and Brand Slogan in this year's Gen Next survey.

Other global brands that appeal to the youth market include McDonald's, which won Coolest Fast Food Place, while Apple dominated in the Computer Brand and Cellphone categories.

In many instances this



Trend strategist Dion Chang.

fascination with international brands is due to the fact that there are no local alternatives.

Trend strategist Dion Chang, the founder of research trend specialists Flux Trends, says that within the more affluent youth market there is a strong push to ask more questions about brands, including whether the product is sustainably sourced and whether it is local.

"The Covid-19 pandemic has been for Gen Z what 9/11 was for millennials: it has further highlighted inequalities and resulted in increased calls for social justice," says Chang.



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Purchasing habits

Post-Covid consumers

New priorities & new playgrounds

Today's youth want belonging, fame and novelty; are brands up to the challenge?

By LYNETTE DICEY

The Covid-19 pandemic has had a profound impact on buying habits of consumers, including the youth market.

Lockdown reduced most people's disposable incomes, influencing their priorities and altering purchase channels.

According to Have You Heard's Covid-19 Consumer Report, about half of consumers aged 18 to 24 have cut down on their monthly expenses and 38% have started buying more from local independent suppliers.

"The report identified upticks in certain behaviours, including fewer birthday parties and social occasions which has resulted in less gift buying, a renewed focus on buying local, second-hand and more unique items, as well as a focus on comfort wear," says HaveYouHeard's Jason Stewart.

While many of the shortterm changes to purchase
behaviour are due to the
lockdown, he believes this
trend will continue until
the youth start interacting
more with others in real
time, when deeper core
behaviour drivers such as
peer pressure, conformity
and badging will come screaming
back to life.

"Sales of items such as jeans



Jason Stewart, HaveYouHeard.

have dropped because no one feels like slouching at home in anything except tracksuit pants, but this will be very different when we start entering spaces with other people again," says Stewart.

This period has forced consumers to try new things. Some will stick, some won't.

In an increasingly hyperconnected world, brands that want to grab the attention of today's youth need to become part of the youth market's cultural playground.

"The youth are driven by belonging, fame and novelty," says Stewart. "They need to fit in, they want to be famous, to experiment and explore the world. The playground for this is

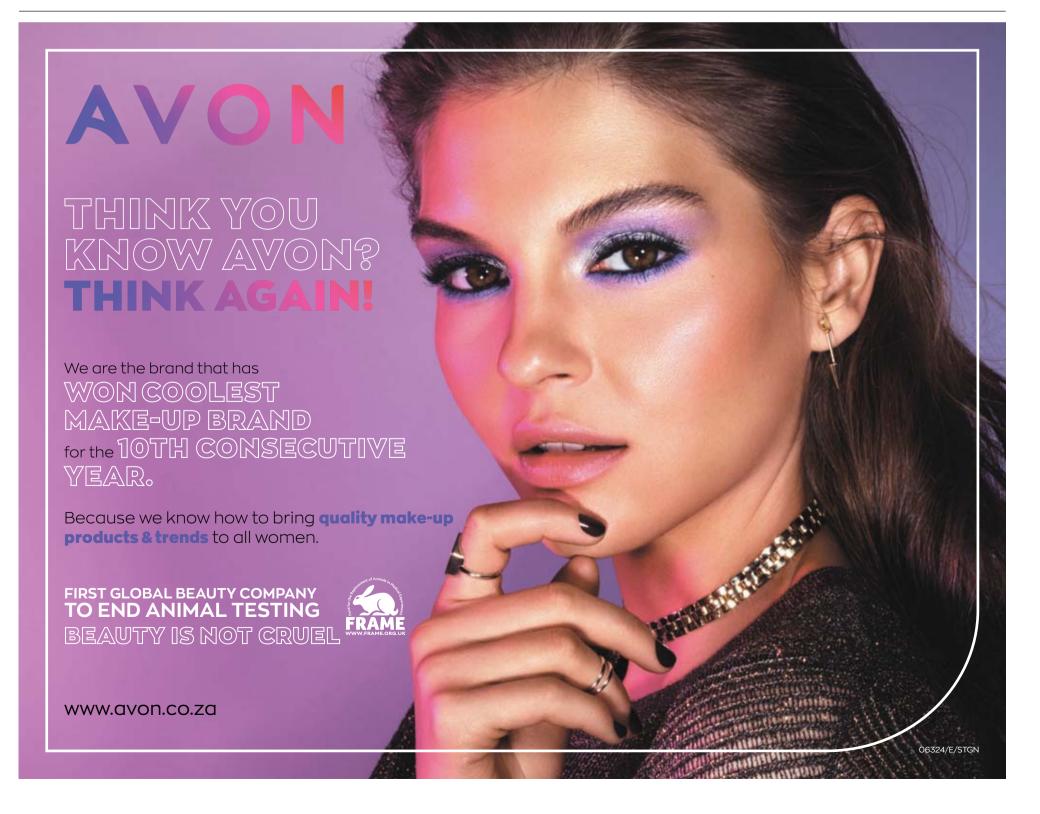
popular culture, including social media, technology, music, fashion, food, ideology and gaming. To appeal to the youth, brands need to become a stamp of approved, affirmed identity to the things they love and crave. Flexibility is key given that brands need to be able to adapt and move to new areas such as shifting from Instagram to TikTok."

To appeal to the youth market, brands need to understand that a mobile-first strategy is key, says CEO of TMARC Nick Terry.

"Digital is the screen of choice the majority of the time. It's an ecosystem which provides access to every channel," he says.

"As a brand you need to understand the trends at speed, track the trending conversations, join the conversations and add value to their conversations."

And, given the rapid rate at which trends and behaviours are changing, Terry says it's imperative that brands talk to the youth.





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Brand purpose

Take a stand But be sincere, fearless and consistent

The youth market is quick to see through the brands that pretend to care about a cause

By LYNETTE DICEY

here has been an increased focus in recent years on brand purpose: the reason for a brand's existence beyond merely making money. The Covid-19 pandemic highlighted the need for brands to have a purpose that connects with consumers on an emotional level.

Brands are no longer just companies that make things but rather a persona the youth market wants to think of as a friend, says Jason Stewart, co-founder of full service communications agency HaveYouHeard.

Brands that are able to play this game well can become sought-after among younger consumers but it

requires absolute consistency, no fear and no holding back.

"The current wave of activism and social justice permeates the youth more profoundly than any other age group. They feel other people's pain and have a frantic need to belong. Brands that stand for something positive provide the youth with a space, a platform and an outlet to be part of something they care deeply about," says Stewart.

The youth market consider themselves to be responsible consumers and expect brands to have a purpose which aligns with their own principles and values, says Sinesipho Ngcayisa, a strategist at advertising agency FCB Joburg.

The youth market is a purposefuelled generation who want to stand for something and create change, agrees Lara Petersen, MD at Sherbet Youth Agency. "They are determined to build a fair future for all – extremely impassioned and overtly vocal about social causes and meaningful movements."



FCB Joburg strategist Sinesipho Ngcayisa says the youth expect brands to align with their own values.



authenticity and sincerity are vital.

She says they are increasingly expecting brands to take a stand but only when that stand is sincere or relevant. They are quick to see through "virtue signalling", where brands advocate for a cause in a bid to bank on a trending movement rather than taking real action to live by those values.

"Authenticity and sincerity are vital to building a brand purpose that the youth would be willing to believe in," says Petersen.

Despite a renewed focus on purpose, particularly during the Covid crisis, there continues to be a discrepancy between what brands say they care about and what they actually do care about.

One brand that takes purpose seriously is this year's Sunday

Times Gen Next Coolest Overall Brand, Nike. In Nike's case, purpose has proved to be profitable, adding about \$6bn to the company's share price after it came out in support of controversial US football player Colin Kaepernick.

The brand also recently received plaudits for its "Play for the World" campaign created by Portlandbased advertising agency, Wieden & Kennedy, which reinforces the idea that we need to play – and exercise - inside. But even Nike does not get it right all the time with critics quick to point out instances when the brand fails to live its values.

As far as local brands are concerned, most don't stand out in terms of brand purpose or exhibiting high levels of social

consciousness. "Very few local brands get it right," says Ngcayisa.

She says that most are not sufficiently brave to approve creative executions that challenge the status quo directly. One brand that regularly swims against the tide in terms of creative bravery, however, is Nando's, this year's Coolest Eat Out Place winner in the Gen Next survey.

A growing culture of accountability means the youth are comfortable with calling out brands they don't believe are being purposeful. However, whether this will keep them from supporting a brand that fulfils other needs outside of their morality or projections of it is up for debate, says Ngcayisa.



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these are the coolest brands in the land!

key categories are in alphabetical order and figures refer to the overall percentages

Advertising Mediums			
1 Facebook	24.06%		
2 YouTube	22.14%		
3 Instagram	20.96%		
4 Television	13.09%		
5 Twitter	6.81%		

Banks	
1 Capitec Bank	24.75%
2 FNB	24.74%
3 Standard Bank	15.62%
4 Absa	12.82%
5 Nedbook	11.90%

Birthday Wishlists	
1 Smartphone	20.19%
2 Money	14.05%
3 Car	13.73%
4 Laptop	12.59%
5 Cake	6.82%

Brands Overall		
	14.74%	
2 Apple	8.48%	
3 Samsung	8.32%	
4 BMW	8.05%	
E L adidas	7.6196	

Brand Slogans	
1 Just Do It (Nike)	24.40%
2 I'm lovin' it (McDonald's)	13.78%
3 So good (KFC)	8.25%
4 All in (odidas)	7.69%
5 Off the Wall (Vans)	6.90%

Breakfast Cereals	///
1 Kellogg's Corn Flakes	17/16%
2 Nestlé MILO	12.10%
3 Jungle Oats	11.11%
4 Kellogg's Coco Pops	9.75%
5 FUTURELIFE	8.29%

Campaigns Targeted at Youth	
1 Speak Out	17,31%
2 loveLife	16.61%
3 Soul Buddyz	15.26%
4 Soul City	11.93%
5 Save the Rhino	10.98%

Cartoon Shows	
1 Mr. Bean	12.46%
2 The Regular Show	11.55%
3 Tom and Jerry	9.54%
4 Family Guy	7.93%
5 Teen Titans	7.55%
	///

Cellphones	
1 Apple iPhone	31.95%
2 Samsung	29.75%
3 Huawei	22.30%
4 Hisense	5.81%
5 Sony	2.92%

Chewing Gums	
1 Stimorol	17.64%
2 Orbit	16.00%
3 Mentos	14.83%
4 Chapples	10.85%
5 Infinity (Stimorol)	9.90%

thocolates //		Clothing Brands	
BAR.ONE	10.75%	i Nike	18.58%
Cadbury Diary Milk	9.70%	2 adidas	11.64%
Ferrero Rocher	9.29%	3 Redbat	7.87%
KitKat	8.83%	4 Gucci	7.53%
Lunch Bar	8.78%	5 FILA	5.41%

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C	0	ld Drinks		
1	Ī	Coca-Cola	28	.23%
2	1	Fanta	14	.02%
3	I	Appletiser	11.	04%
4	1	Sprite	9.	90%
5	1	Sparletta Creme Soda	5.1	83%

Colleges	
1 College of Cope Town	21.59%
2 Rosebank College	20.40%
3 Varsity College	13.10%
4 Damelin College	9.72%
5 South West Gauteng College	8.53%

	Community Programmes		
J	Add Hope (KEC)	11.60%	
1	2 Khumbul'ekhaya	11.43%	
	3 Childline	9.11%	
	4 Save the Rhino	8.59%	

8.22%

5 | Speak Out

C	0	mpanies to work for	1	
1	1	Mercedes-Benz	1	10.46%
2	1	BMW	_1	9.32%
3	1	Apple	- 1	8.50%
4	1	Samsung	- 1	7.35%
5	I	Nike	I I	7.12%

	Computer Brands	
١	1 Apple Moc	23.12%
J	2 Samsung	22.57%
١	3 Hisense	9.32%
	4 Microsoft	8.13%
Ì	5 LG	7.36%

Console/Computer Games				
	FIFA		2110%	
2	Grond Theft Auto (GTA)	- 1	17.84%	
3	Need for Speed	- 1	11.99%	
4	Subway Surfers	ı	11.37%	
5	Candy Crush Saga	- 1	10.28%	

Dairy Drinks	111
1 Nestlé Hot Chocolate	18.00%
2 Tropika	14.86%
3 Ultra Mel Custard	14.22%
4 MILO	12.83%
5 Yogi Sip	8.16%

Eat Out Places	
1 Nondo's	20.39%
2 Spur	17.97%
3 Wimpy	12.34%
4 Mugg & Bean	10.35%
5 RocoMamas	9.94%

Energy Products	
I Red Bull Energy Drink	15.28%
2 Powerade	14.07%
3 Monster Energy Drink	12.66%
4 Dragon Energy Drink	10.66%
5 Energade	9.25%

9.54%
7.91%
7.61%
7.60%
7.33%

Fast Food Places	1111
1 McDonald's	20.69%
2 KFC	13.07%
3 Burger King	10.64%
4 Nando's	10.05%
5 Debonairs	9.97%

Female Deodrants	
	1.766%
2 NIVEA	12.07%
3 adidas	11.03%
4 Dove	10.76%
5 Avon	8.83%

Feminine Hygiene Products					
1	ı	Always	- 1	31.60%	Ī
2	I	Kotex	- 1	21.15%	
3	I	Stayfree	- 1	18.07%	
4	I	Lil-Lets	1	11.10%	
5	I	Gynaguard	- 1	5.16%	

42.26%
40.32%
10.89%
6.35%
0.19%
֡

Gaming Consoles	
41.10%	
19.08%	
14.28%	
10.99%	
6.09%	

Grocery Stores	
1 Woolworths Food	17.92%
2 Pick n Pay	15.89%
3 Checkers	13.45%
4 Food Lover's Market	10.66%
5 Spar	10.38%

Haircare Products	
1 Dark and Lovely	15.76%
2 Dove	11.21%
3 Avon	9.21%
4 Sofn'free	8.69%
5 Easy Waves	8.23%

Hotel Groups	
1 Protes Hotels	26.77%
2 Sun International	18.75%
3 Hilton Hotels & Resorts	15.36%
4 City/Town/Road Lodge	13.71%
5 Tsogo Sun	12.63%

-creams	
Mognum	26.20%
Oreo	15.69%
Woolworths Tin Roof	14.35%
Nestlé BAR.ONE	10.02%
Polar Ice Cream	8.98%
	- Creams Magnum Oreo Woolworths Tin Roof Nestlé BAR.ONE Polar Ice Cream

I can't live without	7
1 Family	25.67%
2 God	23.12%
3 Parents	10.99%
4 Music	10.08%
5 Money	9.08%

Jobs			Kids TV Channels			DIS (radio or club)	
1 Dester	19.76%	/	1 Cartoon Network (DStv 301)	21.87%		1 Kabza De Small	17.49%
2 Engineer	14.90%		2 Disney (DStv 303)	15.22%		2 Black Coffee	15.36%
3 Lawyer	12.19%		3 Nickelodeon (DStv 305)	14.25%		3 DJ Zinhle	12.73%
4 Actor/Actress	10.04%		4 Boomerang (DStv 302)	12.77%		4 DJ Maphorisa	12.52%
5 Soccer Player	9.21%		5 Disney XD (DStv 304)	11.57%		5 DJ Tira	10.14%
		1	111111		7		

10.64% 9.90%

7.87%

7.27%

ney (DStv 303) 15.22% 2 Black Coffee 15.36 kelodeon (DStv 305) 14.25% 3 DJ Zinhle 12.73°			
ney (DStv 303) 15.22% 2 Black Coffee 15.36 kelodeon (DStv 305) 14.25% 3 DJ Zinhle 12.73°	DJS (radio or club)		V Channels
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	2 Black Coffee 15.36%	15.22%	ney (DStv 303)
omerang (DStv 302) 12.77% 4 DJ Maphorisa 12.52	3 DJ Zinhle 12.73%	14.25%	kelodeon (DStv 305)
	4 DJ Maphorisa 12.52%	12.77%	omerang (DStv 302)
ney XD (DStv 304) 11.57% 5 DJ Tira 10.149	5 DJ Tira 10.14%	11.57%	ney XD (DStv 304)
			11111

Local Entertainment Places		
Gold Reef City	N i	9 27%
2 Sun City	-11	7.83%
3 uShaka Marine World	11	6.26%
4 Nu Metro	- 11	5.92%
5 The National Zoo	1.0	6.42%

Local Sport Personalities

2 | Thembinkosi Lorch

4 | Simphiwe Tshabalala

3 | Percy Tau

5 | AB de Villiers

Local Female Celebrities		Lo
1 Sho Madjozi	14.92%	11
2 DJ Zinhle	10.71%	2
3 Lady Zamar	7.76%	3
4 Boity Thulo	7.16%	41
5 Minnie Dlamini	7.03%	5
		//

20.61%

11.50%

9.25%

8.09%

7.88%

Male Deodorants	
1 NIVEA Men	18.269
2 Playboy	13.62%
3 English Blazer	13.47%
4 AXE	11.94%
5 adidas	9.50%

cal Male Celebrities

Trevor Noah

Kabza De Small

Cassper Nyovest

12.13%

9.52%

7.65%

7.08%

Mobile Games		
1 FIFA Mobile	22.63%	
2 Subway Surfers	21.74%	
3 Candy Crush Saga	18.04%	
4 Minecraft	10.91%	
5 Fortnite	10.53%	

Motor Vehicles	
1 Mercedes-Benz	15.00%
2 Lamborghini	13.24%
3 BMW	12.77%
4 Range Rover	6.90%
5 Ferrari	6.81%

Make-Up Brands

2 | Revion

3 | POND'S

4 | L'Oréal

5 | MAC

1 YouTube	17.629
2 iTunes/Apple music	I II I robinso
3 Google Play Store	10.10%
4 JOOX	9.21%
5 MP3Juices	8.269

Online Fashion Stores/Apps		
) (Takenia)		24.62%
2 Mr Price	1	22.12%
3 Zara	- 1	12.15%
4 H&M	- 1	11.18%
5 Superbalist	1	10.61%

Online Influencers	
1 Bonang Matheba	25.69%
2 Somizi	23.70%
3 Kim Kardashian	21.05%
4 Lasizwe	12.14%
5 Mihlali Ndamase	7.65%

Petrol Stations	
1 Engen	28.63%
2 Total	18.07%
3 Caltex	17.86%
4 Shell	16.56%
5 Sasol	9.99%

Radio Stations		
I Matro PM	20.42%	
2 Ukhozi FM	13.37%	
3 Jozi FM	6.55%	
4 Lesedi FM	6.35%	
5 947 (Highveld)	6.18%	

Silve/Footwear Brailes	
1 Nike	19.69%
2 adidas	10.79%
3 FILA	9.29%
4 Jordan	8.43%
5 Vans	7.52%

Shopping Malls	
1 Mail of Africa	14.48%
2 Gateway Theatre of Shopping	13.60%
3 Sandton City	12.77%
4 Canal Walk	6.22%
5 Mall of the South	5.55%

Skincare Products	
i I NIVEA	20.86%
2 Dove	13.66%
3 Vaseline	13.00%
4 Avon	7.39%
5 POND'S	5.74%

ncks		Soap Bars	
Doritos	25.12%	1 Dave	17.83%
Lay's	16.29%	2 Protex	16.01%
Simba Chips	13.37%	3 Dettol	14.30%
Oreo	7.69%	4 NIVEA	11.20%
Pringles	7.30%	5 Lux	9.85%



Specialist Stores (Health, Beauty & Accessory)			
1 Click	S	- 1	20.66%
2 Dis-C	hem	1	15.44%
3 Wool	worths	- 1	12.94%
4 Edga	rs	- 11	11.27%
5 Avon		1	8.79%

Spreads/Sauces	
1 Nutella	16.98%
2 Rama	14.63%
3 Nando's Sauces	12.16%
4 ALL GOLD Tomato Sauce	10.96%
5 Melrose Cheese Spread	10.85%

Stationery Stores		
	21.83%	
	21.67%	
	13.37%	
	12.10%	
	11.80%	

Sweets	
1 Pin Pop	12.03%
2 Jelly Tots	8.77%
3 Smarties	8.31%
4 Mentos	7.69%
5 Smoothies	7.68%

28.65%
25.25%
19.31%
18.51%
5.84%
֡

Tinned Foods	
) kes	34.12%
2 Lucky Star	21.43%
3 ALL GOLD	20.59%
4 Rhodes	8.79%
5 Bull Brand	7.68%

Toothpastes	
1 Colgate	29.03%
2 Aquafresh	22.91%
3 Sensodyne	19.42%
4 Oral-B	17.86%
5 Close-Up	3.92%

TV Channels		
	1 Certoon Network (DStv 301)	9.61%
1	2 Mzansi Magic (DStv 161)	7.81%
	3 TRACE Urban (DStv 325)	7.71%
1	4 M-Net Movies All Stars (DStv 111)	7.25%
	5 Disney Channel (DStv 303)	6.54%

TV Music Channels	
) channel 0 (0Sty 320)	23.93%
2 TRACE Urban (DStv 325)	23.51%
3 MTV Base (DStv 322)	22.54%
4 TRACE Africa (DStv 326)	7.67%
5 MTV (DStv 130)	7.52%

TV Programmes/Series			1
1 Lockdown	- 1	12.63%	
2 Black'ish	- 1	12.41%	
3 The Big Bang Theory	1	11.43%	
4 Kulfi: The Singing Star	J	9.60%	
5 Ridiculousness	- 1	7.86%	

TV Soaps	////
1 Uzolo	21.89%
2 The Queen	15.26%
3 Empire	11.24%
4 7de Laan	8.22%
5 IsiBaya	7.93%

orms
23.93%
23.74%
22.31%
18.40%
6.21%

ı	loy Stores		
l	1 Toys R Us	24.57%	
ı	2 Game	22.33%	
Į	3 The Crazy Store	19.04%	
۱	4 ToyZone	14.27%	
ı	5 Toy Kingdom	12.91%	
,			

A	Universities			P
	1 University of Cope Town (UCT)	1	19.40%	
	2 University of Johannesburg (UJ)	1	14.30%	
1	3 Unisa	1	9.76%	
	4 University of Witwatersrand (Wits)	1	8.16%	
	5 University of KwaZulu-Natal (UKZN)	1	8.09%	

	Weekly Newspapers	
	1 Sunday Times	27.89%
1	2 Sunday Sun	16.71%
	3 City Press	14.82%
1	4 Soccer Laduma	13.37%
	5 Saturday Star	8.74%
j		///

Yo	ogurts		
1.1	Parmalat	32.5	27%
2	Danane NutriDay	19.0	6%
3	Clover Classic	14.0	7%
4	Woolworths brand	14.0	3%
5	Yogi Sip	12.8	5%



tensions, tribes & trends



Gaming

Esports is taking off

Local brands need to catch the wave

Sponsorship in the SA gaming space is just getting started

By **SCOTT PETER SMITH**

habo Moloi's mother wasn't always supportive of him playing video games for much of his day and night, just like any mother. But that changed two years ago when those countless hours turned into winning SA's first Fifa qualifiers on PlayStation and taking home R400,000.

Fast forward to today and Moloi has just been named Red Bull's first signed esport athlete not only from SA but the whole continent.

For those not in the know, the Fifa eWorld Cup is virtual football's equivalent of the Fifa World Cup. And sponsoring such a high-profile event, even off the playing field, is a smart move from the 2020 voted Coolest Energy Drink.

Africa gaming growth is increasing 6.6% year on year, accounting for about 28% of annual growth in the sector, according to gaming research outfit Newzoo. Africa is the only region in the world where the youth population is growing. By 2050 Africa's young people, meaning those aged between 0 and 24 years old, will rise by nearly 50%.

Take the mixture of brands you voted Coolest Energy Drink, with the Coolest Game, along with the Coolest Console, mix in a normally elusive group to advertising, Gen X and Y, put it on a stage celebrating today's new athletes, and you have a potent combination that SA has only just dipped its toes into

Esports, or competitive video games, attracts previously unheard-of fan engagement and immersion figures. And gaming as a whole is the largest entertainment industry by far — worth about \$145bn, next to \$42bn for movies and \$20bn for music.

There is a great opportunity for digital marketers in SA to reach one of the biggest growth industries in the world tied to one of the hardest-to-reach audiences.

Michael James, founder and organiser of the annual Rage Expo and Rush Esports, and part of the engine behind the 2020 Coolest Weekly Newspaper Sunday Times' own foray into gaming, GamersLIVE on www.timeslive.co.za, says that while he has seen a growth of brand involvement in this space, it needs more direction.

"Brands often don't know what they want to do," says James, "There is a lot of interest, it's just not very well directed."

But for marketers able to navigate the nascent esports landscape that some people – including myself – consider to be a bit like



Thabo Moloi, 16 at the time, wins the PlayStation Fifa qualifier at Montecasino, Johannesburg, in 2018. Moloi walked away with R400,000. Pictures: Scott Peter Smith



An esport athlete prepares for a match at the Rage Expo in Johannesburg.



There's a growing investment from brands in the XR, AR and VR gaming arena.

gamers have a rarely seen loyalty to brand.

Take what Toyota did around Fifa last
month – a collaboration with local agencies

ASPIRING FUTU

month – a collaboration with local agencies created a unique sports sponsorship opportunity, combining the experience and expertise of a traditional sports agency with that of an esports specialist. And a R50,000 prize pool to boot.

the Wild West, the paybacks can be huge as

And Ford SA also held a sim car racing event where 11 of the country's best sim racers provided a thrilling climax on August 1. The #LockdownLaps competition grabbed the attention of more than 200 SA sim racers, all keen to measure their speed on the competition's erstwhile leaderboard. Their YouTube channel live-streamed the entire even.

In other words, brand sponsorship in the local gaming space is heating up, but there's still wide-open opportunity for brands looking to get involved.



Thulani 'LighteRTZ' Sishi, co-owner of Big 5 Esports, warms up before a big game.



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FACTBOX

Global esports revenues will grow to \$1.1bn in 2020, a year-on-year growth of 15.7%, up from \$950.6m in 2019. In 2020, \$822.4m — or three-quarters of the total market — will come from media rights and sponsorship. Globally, the total esports audience

will grow to 495-million people in 2020, a year-on-year growth of 11.7%.

Mobile esports enjoyed a huge spike in the past year, with emerging markets like Southeast Asia, India and Brazil at the forefront of this growth. — source Newzoo



tensions, tribes & trends



Entertainment

Is local lekker Or is our lifestyle still 'made in America'?

Gen Next want to see themselves represented and local brands need to find a way to do this

By KYLE ZEEMAN

ike titans locked in an epic and eternal battle, local and international brands compete for the attention of Generation Next, with this year's list of top brands throwing out some interesting results that may have a major bearing on how brands interact with youth in the future.

While local brands feature heavily in this year's survey, and many have increased their influence, it is clear that Generation Next still gets many of its "premium" lifestyle inspirations beyond our borders.

The Coolest Clothing brand among Generation Next remains Nike, followed by Adidas. Interestingly, SA brand Redbat overtook Gucci to finish third on this year's list.

Similarly, the Coolest Cellphone brand was the Apple iPhone and handsets by Asian tech giants Samsung and Huawei. A local brand does feature in this year's list, up from last year: Mobicel.

It even shows in the most

desirable companies to work for, with international lifestyle brands collecting eight of the 10 spots.

The Coolest Brand Overall remains Nike, with Apple second and Samsung third.

This is unsurprising to 16-yearold Junior Macamo, who says the brands you use are often influenced by the people you look up to.

"International brands have more recognition than local brands. They are used by athletes, actors and entertainers.'

For 15-year-old Immad Haider, such brands are a status symbol.

"If you are not wearing Nikes you stand out in a crowd as a person who can't afford it," he says.

"There's nothing wrong with the local fashion: it's just that social media cares more about what outfit you are wearing: if it doesn't say Nike or Adidas then you won't really be noticed," says 14-year-old Kgositsile Phiri, suggesting that local brands need to introduce more unique designs to grab attention.

Musician Riky Rick is heavily involved with Generation Next, through his music, fashion and annual lifestyle festival Cotton Fest. He said that local brands have done a good job creating the trends that international brands adopt, but now need to invest in reaching the youth through grassroots influencers.

'They need to be better at marketing themselves. They need to



better at marketing themselves. Mini Photography



DJ Kabza De Small says his music helps Generation Next embrace who they are and have fun. Piano Hub

take the lead from global brands on adopting ambassadorship programmes and signing on influencers."

Publicist Melanie Ramjee has worked with several top local and international brands, connecting them with Generation Next, and says there has been a seismic shift in the way the youth of today interact with brands.

"The older generation seemed to gravitate toward curated content, whereas this new generation of kids are posting real stuff, which is more authentic in terms of what they feel and represent," says Ramjee.

"If local brands want to really reach the youth, they need to get into their minds, be authentic and speak to them more, rather than presenting something that is often unattainable."

Nowhere is this move towards local content seen clearer than in the results for Coolest TV Streaming Platform and Coolest TV Series, where DStv and drama series Lockdown beat their

international competitors to top their categories.

Similarly, local musicians such as Sho Madjozi, Nasty C and Kabza De Small, who have always embraced African inspiration in their music and dress, topped their categories for Coolest Local Female Celebrity, Coolest Local Male Celebrity and Coolest Local DJ respectively.

Kabza says that African content is unique and unites both the country and continent.

"It's true to who we are as a nation. Amapiano is actually very broad in its sounds and styles. It resonates with youth because of the bassline and street style vocals, and with the older and mature market because of the jazzy, sweet sounds. Despite it's appeal to the youth, it also appeals to everyone and unites us as a nation."

He says his popularity is down to him making music that helps Generation Next embrace who they are and have fun.

"If I could give any advice to the

youth, it would be: remain true to yourself and what you stand for, remember your roots, and also pay homage to those that inspired and paved the way for you."

Ramjee says that there is a global demand for African entertainment content, as seen by the explosion of African-inspired music and Beyoncé's recent visual album Black Is King.

"There is still a massive emotional pull when you see yourself represented in film, TV or music. These platforms speak to us on a very personal level, so it is no surprise that Generation Next is seeking out high-quality local content that speaks to them and their situations in life.'

Junior agrees. "What local musicians sing about relates better to me and my circumstances, so naturally I enjoy it more," he says.

Fifteen-year-old Jack Da Silva says that local content "hits different", and is tied to a sense of loyalty. "We have to support and hype our people first."





tensions, tribes & trends



Technology in education

Cost & connectivity SA still has a long way to go

The zero-rating of educational platforms is key to greater access

By $\operatorname{\textbf{HERB}}\operatorname{\textbf{PAYNE}}$

he government recognised technology's importance in education 16 years ago in a 2004 white paper on e-education, but many feel it has failed to achieve these objectives.

Professor Mmaki Jantjies, associate in information systems at the University of the Western Cape, believes SA leads the continent in edtech. But she also feels there's a gap between government policies and delivery of the measures and infrastructure necessary to harness cellular networks and computers as an effective platform for broadbased digital education.

Arthur Goldstuck, MD of technology research and strategy organisation World Wide Worx, agrees, saying that all the pieces of the puzzle are there: they just need the political will, the regulatory environment and the expenditure (the 2010 Fifa World Cup proves the government can access funds when desired) to put them together.

He says: "The fundamental requirements for effective tech education delivery include broadbased, high-quality, connectivity — in SA that means mobile connectivity — and affordable (in

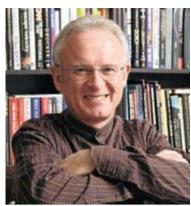


Prof Mmaki Jantjies, associate in information systems at the University of the Western Cape.

reality free) access to digital learning platforms.

"While mobile operators boast 98% cellular coverage and annual expenditure on infrastructure of between R5bn and R10bn, this tends to be focused on rich areas. Regulatory changes are imperative to enable Icasa to insist licensees focus greater resources on upgrading underserviced areas," says Goldstuck.

Also vital, he says, is the zerorating of educational and public interest platforms, making them accessible to all students. The government has approved over 980 sites, but these are not mandated by Icasa. Furthermore, though service



Arthur Goldstuck, MD of technology research and strategy organisation World Wide Worx.

providers have cut data costs by 30%, they still are not affordable.

Telkom, whose cellular network rose from second place in 2019 to become 2020's Coolest Telecoms Provider, says it has high connectivity around SA: any gaps are filled through a roaming agreement with another network.

Spokesperson Mooketsi Mocumi says Telkom supports the zero-rating of educational content, and has zero-rated 778 websites so far. It has also zero-rated access to all government universities and technical and vocational education and training (TVET) colleges.

Jacqui O'Sullivan, corporate affairs executive at MTN, another



Angela Schaerer, technology business relationships manager at

top three Coolest Service Provider, says MTN is working with the other operators and the government to zero-rate approved URLs.

"MTN, which spent more than R50bn in five years on network nfrastructure, has zero-rated more than 400 websites in a continuing process. It has also zero-rated all universities and TVETS and is now prioritising schools."

Ultimately, however, says Curro Schools technology and business relationships manager Angela Schaerer, technology will not replace teachers. "It just gives them the tools to enhance the teaching process and reduce the administrative burden."



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tensions, tribes & trends



Teaching

Education gap

Schools battle with new normal

Covid-19 pandemic has shown up the failures in the country's schooling

By **HERB PAYNE**

minute virus, invisible to conventional microscopes and so simple that it is uncertain whether it constitutes life, has plunged the world into chaos – nowhere is this truer than in education.

The UN Educational, Scientific and Cultural Organisation (Unesco) notes that 1.2-billion students globally have, thanks to the Covid-19 pandemic, suffered school closures.

Locally, nearly 18-million school children, tertiary and university students were locked out of their institutions in March and most had still not returned by mid-July.

Has this tiny organism stripped SA youngsters of any hope of achieving their dreams of becoming doctors, with the latest Merc as their set of wheels and Apple iPhones in their back pockets?

Coronavirus is certainly cataclysmic. Educators across the board – public and private schools – scrambled to keep learning going without direct classroom contact, while parents struggle to become de facto educators. A cornerstone to this has been the ability to harness available technology.

Private schools and former model C schools, with their students often enjoying laptop ownership and uncapped internet, were undoubtedly better placed than public schools.

The objectives of educators are not only to use technology as a



Saths Cooper, president of the Pan-African Psychology Union.

teaching aid, but to make students sufficiently technologically sussed to take on the school curriculum.

They aim to give students the tools they need to become productive elements in, and beneficiaries of, a world increasingly dominated by artificial intelligence and other technologies that are driving the fourth industrial revolution.

The reality, however, according to former struggle stalwart Saths Cooper, now president of the Pan-African Psychology Union, is that the education system has been out of kilter with the needs of the majority of SA youth for years.

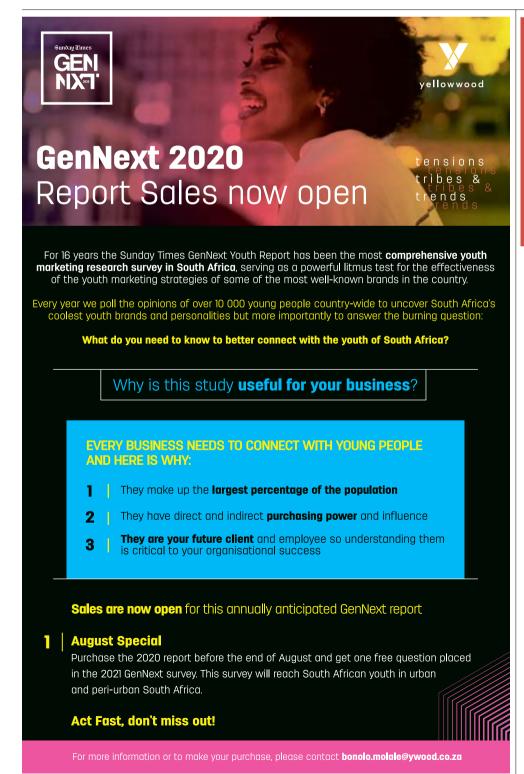
"An element in the 1980s struggle was for smaller classes – 30 learners in a class instead of 45 to 50 – but those sort of things are still with us," says Cooper.

"There's a massive gap between the haves and have-nots in SA with education having been dumbed down for the majority to the extent that when they leave school, many don't bother to register as unemployed because there isn't a hope of getting a job.

"The two things that any country should get right are education and health. The government's failure with both of these has been highlighted by the coronavirus pandemic."

The same theme is echoed in the mission statement of the IkamvaYouth organisation, which says it exists because 50% of children do not make it to grade 12 – 500,000 learners annually – along with the fact that 80% of SA schools are dysfunctional.

Clearly, rather than torpedoing SA education, Covid-19 has highlighted the mismatch between education and the needs of school leavers. But given government inertia it may well rest with the resilience of youth to turn things around and avoid the creation of further "lost generations".







tensions, tribes & trends



Unemployment

Economic tsunami Recession and Covid collide

Even more pressure on jobs as economy sinks

By HERB PAYNE

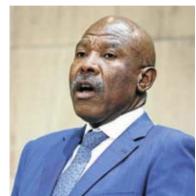
he perfect "unemployment storm": On one front blows the scourge of high residual, predominantly youth, unemployment, driven by a recessionary economy buffeted by ratings downgrades.

Converging with it is an economic tsunami precipitated by a global pandemic.

The Stats SA Quarterly Labour

Force Survey for the first quarter of 2020 – the three months leading up to lockdown – states that the official unemployment rate was 31.1% (7.1-million people without jobs in the formal economy excluding agriculture), while in the age group 15 to 24 years those who were not employed, education or training increased from 33.2% in January to March last year to 34.1% in the first quarter of this year.

It's a situation that is unlikely to improve in the wake of the measures introduced by the government during March and which, though they have been slightly eased, still remain in place



SA Reserve Bank governor Lesetja Kganyago says Covid will produce the worst economic downturn in a century. Picture: Phill Magakoe

in August to slow the spread of the coronavirus.

Despite measures such as stimulus packages and unprecedented borrowings from the International Monetary Fund to mitigate the economic impact of the lockdown, few believe the pandemic will do anything but harm the SA economy, and that means pressure on jobs.

SA Reserve Bank governor Lesetja Kganyago put it in a nutshell in June during a discussion facilitated by Wits University vice-chancellor, professor Adam Habib, when he said: "It is now clear that the Covid-19 outbreak will produce the worst economic downturn in a century.

"We expect that 'the great lockdown' will cause output to contract by about 7% this year. The last time a figure of that magnitude appears in our data is 1931, during the Great Depression, when output fell by 6.2%. It had declined by 6.1% in 1930."

With those sorts of pressures on the economy it is hardly surprising that employment will be at a premium, and frequently employment favours those with qualifications and certificates over those without.

This is borne out by the Stats SA figures which show that of those South Africans who were unemployed during the first quarter of the year, 54.8% had education levels below matric; 35.4% were matriculants; only 2.3% were university graduates; and 6.8% had other tertiary qualifications.



UCT was voted SA's Coolest University of 2020.



UCT medical students volunteer their time on a Covid-19 hotline.



 $\label{lem:variety} \textbf{Varsity College aims to prepare their students for the world of work.}$

Colleges and universities

Cape Town top spot for students

By HERB PAYNE

"Girls just wanna have fun" go the lyrics of the Cyndi Lauper song, but leisure and pleasure play second fiddle when it comes to choosing the right university or tertiary institution for a rounded education.

Nevertheless, one could be forgiven for thinking that the leaders of tomorrow had fun in mind when they chose Cape Town as the top of the pops for both graduate and tertiary education.

Not only is the University of Cape Town (UCT) SA's Coolest University, but rubbing shoulders with it in the tertiary category, Cape Town College leads the field as the first choice for many students. This is especially true for those who want a technical vocational education, with courses ranging from beauty therapy to engineering.

UCT's vision is to be an inclusive, research-intensive African university addressing the challenges of our time. Typically, as spokesperson Elijah Moholola says, it is in the thick of the battle to beat Covid-19.

A few initiatives include UCT experts advising the government at provincial and national level in several sectors. It has staff at the provincial health department and the National Health Laboratory Services, and is working in local hospitals and clinics. More than 100 UCT medical students also man a hospital's Covid-19 hotline.

The university says the five main reasons given by students for choosing it are: high academic standards; reputation; one of the best institutions in Africa; always wanted to study at UCT; and its reputation for outstanding postgraduate research standards.

The country's second Coolest



Felicity Coughlan, Independent Institute of Education.

University is, perhaps surprisingly, one of its youngest. The University of Johannesburg (UJ) was established in 2005 by merging Rand Afrikaans University, part of Vista University, and Technikon Witwatersrand. While offering a wide variety of degrees, it prides itself on being a world-ranking university in development studies.

Following UJ is another university with Western Cape roots. Unisa, established in 1873 as the University of the Cape of Good Hope, made distance learning its forte in 1946 – claiming to be the first university globally to do so. It also claims to be SA's only university to have consistently provided access to learning irrespective of colour, race or creed.

In tertiary education, Cape Town College is closely followed in the



Varsity campus Sandton

top 10 by Rosebank College and Varsity College, both part of Independent Institute of Education (IIE), a division of JSE-listed private education provider ADvTECH. Both have campuses across SA.

IIE director, Dr Felicity Coughlan, says both the Rosebank and Varsity College brands focus on offering quality education in environments that enable students to develop their thinking and communication skills for the world of work.

"We strive to understand student needs and wants and respond accordingly in the context of a single set of qualifications and quality assurance standards. This is why our brands do so well," says Coughlan.

Varsity College campuses offer IIE qualifications in business, accounting, law, IT and humanities. The focus at Rosebank College — which offers 28 certificates, diplomas and degrees — is on quality, affordable full- and parttime education and helping graduates with first-time jobs.



 ${\bf Rosebank\ College\ provides\ quality,\ affordable\ education.}$

