
The Rise and Rise of the Teen Consumer

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Abstract

In the African culture, teens are often ignored or disregarded as they are seen as lacking in knowledge and experience and therefore unable to add value. However in this generation where teens are exposed to so much information, for example from the internet, from an early age, their role and status in society is changing. Even in the political arena, 2011 saw a lot of political upheavals in the Middle East and in North Africa led by youth movements.

In the commercial arena therefore, the teens should also not be ignored, especially in East Africa. Their population size, coupled with their spending power, makes them an important segment for any company manufacturing products, or offering services for youth people.

This paper draws from findings from a youth study carried out by TNS among 12-19 year-olds in Kenya drawing comparisons with other countries.

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Chapter One: Introduction

*"What is happening to our young people?
They disrespect their elders, they disobey their parents.
They ignore the law.
Their morals are decaying. What is to become of them?"* Plato 400BC

Plato's quote above implies that understanding teens is an age-old issue in the society. This study set out to gain an understanding of teens in order to help companies and marketers connect better with them and target their communication more strategically.

The dictionary definition of a teenager is a person between the ages of 13 and 19 inclusive. However, for the purposes of this study we extended our definition to include 12 to 19 year olds. This paper is based on a study carried out among teenagers in Kenya, Uganda and Tanzania. The data was collected quantitatively via face to face in-home interviews.

In Kenya and Uganda, the sample was nationally representative, with the exception of North Eastern in Kenya. In Tanzania we targeted 5 key regions: Dar es Salaam, Dodoma, Mwanza, Arusha and Mbeya. The sample size was 800 in Kenya, 500 in Uganda, and 500 in Tanzania. For the purposes of this study, the term East Africa will be used to refer to the area comprising Kenya, Uganda and Tanzania.

The sampling method applied was multi-stage cluster sampling; this is a random sampling method in which the population is divided into groups – administrative divisions called clusters. We applied age and urban/rural quotas but weighted back to the natural population distribution.

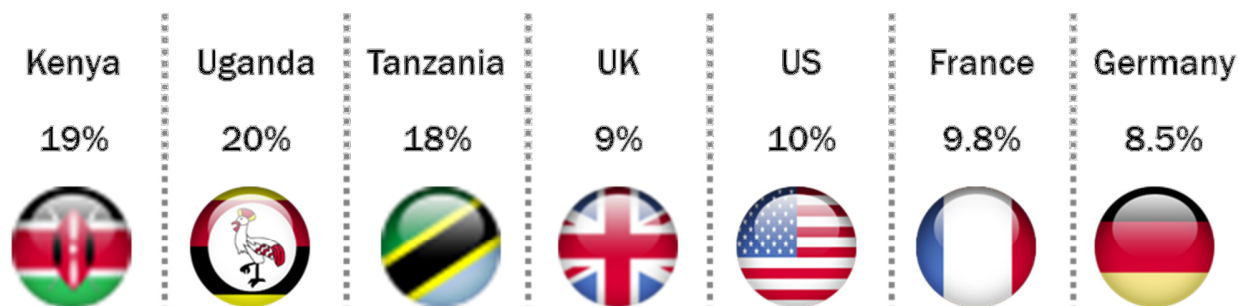
1.1 The size of the teen population

The sheer size of the teen population makes them an important and difficult to overlook segment of the population. This is especially true in Africa compared to the rest of the world.

Sub-Saharan Africa is the youngest region of the world with 44 percent of the population under 15 years. In Asia, Latin America and in the Caribbean about 30 percent of the population is under 15 while in Europe, only 16%. Women in sub-Saharan Africa have the highest fertility rates in any region (on average 5.5 children) and this has been the driving force behind Africa's youthful population.¹

There are more than 18 million teens in East Africa (Based on 2009 census in Kenya, 2002 census in Uganda and 2002 census in Tanzania). That's more than 19% of the East African population. This percentage is significantly higher than that in Western Europe and the US:

Percentage of teen population by country



The teen population according the 2009 census in Kenya, the 2002 census in Uganda and the 2002 census in Tanzania is as below:

Table 1: Teen population in Kenya (2009 population census)

| | Male | Female | Total |
|-----------|---------|---------|------------------|
| 12 | 567,671 | 532,930 | 1,100,601 |
| 13 | 487,708 | 475,577 | 963,285 |
| 14 | 478,811 | 450,946 | 929,757 |
| 15 | 459,517 | 436,317 | 895,834 |
| 16 | 434,776 | 421,622 | 856,398 |
| 17 | 423,615 | 400,013 | 823,628 |
| 18 | 456,815 | 430,878 | 887,693 |
| 19 | 348,930 | 357,060 | 705,990 |
| | | | 7,163,186 |

Table 2: Teen population in Uganda (2002 population census)

| | Male | Female | Total |
|-----------|-------------|---------------|------------------|
| 12 | 396,130 | 394,604 | 790,734 |
| 13 | 321,786 | 324,535 | 646,321 |
| 14 | 321,788 | 319,632 | 641,420 |
| 15 | 295,255 | 281,617 | 576,872 |
| 16 | 296,177 | 285,374 | 581,551 |
| 17 | 248,751 | 246,463 | 495,214 |
| 18 | 273,820 | 308,356 | 582,176 |
| 19 | 210,219 | 262,111 | 472,330 |
| | | | 4,786,618 |

Table 3: Teen population in Tanzania (2002 population census)

| | Male | Female | Total |
|-----------|-------------|---------------|------------------|
| 12 | 532,913 | 519,624 | 1,052,537 |
| 13 | 406,285 | 398,888 | 805,173 |
| 14 | 415,848 | 417,725 | 833,573 |
| 15 | 398,939 | 385,774 | 784,713 |
| 16 | 377,409 | 380,340 | 757,749 |
| 17 | 337,366 | 323,979 | 661,345 |
| 18 | 396,309 | 433,712 | 830,021 |
| 19 | 251,306 | 310,601 | 561,907 |
| | | | 6,287,018 |

1.2 Economic power of teens:

The average Kenyan teen spends KES 200 per week. On the surface this may not appear to be a substantial sum; however this translates to KES 1.4 billion when extrapolated to the entire teen population.

Where do they get their spending money from?

Kenyan teens mainly get their spending money from their parents (86%) or other relatives (21%) when needed. Eighteen percent get their spending money from odd jobs or part-time jobs. This trend is however more common among the older teens as compared to the younger ones.

The proportion of teens getting income from odd jobs or part-time jobs is especially higher among males (27%) as compared to females (10%). Males also record higher mean weekly spend (KES 210) as compared to females (KES 189).

Table 4: Sources of spending money

| | TOTAL | Male | Female | 12-13 | 14-15 | 16-17 | 18-19 |
|-------------------------------------|-------|------|--------|-------|-------|-------|-------|
| Base: Total Sample | 800 | 409 | 391 | 210 | 223 | 189 | 178 |
| From parents when needed | 86% | 83% | 88% | 95% | 93% | 86% | 65% |
| From grandparents / other relatives | 21% | 23% | 19% | 22% | 23% | 21% | 18% |
| Odd jobs/part-time jobs | 18% | 27% | 10% | 3% | 12% | 26% | 37% |
| Gifts | 12% | 13% | 10% | 12% | 13% | 10% | 11% |
| Full-time job | 3% | 2% | 3% | - | 1% | 1% | 9% |
| Regular allowance | 2% | 3% | 1% | 2% | 3% | 2% | 3% |
| Have own business | 1% | 1% | 1% | - | - | 1% | 4% |

Chapter 2: Defining characteristics of this generation of teens

2.1: Profiling the teens

As expected, majority of teens are currently enrolled in school. This percentage is relatively higher in Uganda (86%) as compared to Kenya (82%) and Tanzania (79%). Furthermore, most of East African teens plan to attend college/university (of those not currently attending) – on average 80%.

During their free time, teens like to read – and this may be due to the fact that in the 8-4-4 system from 12 years onwards one has to put in a lot of extra reading hours to prepare for KCPE and likewise thereafter in secondary school.

Table 5: Free time activities

| | |
|---|-----|
| Base: Total Sample | 800 |
| Reading (studying) | 57% |
| Spending time with parents | 42% |
| Spending time with friends | 42% |
| Exercising/Working out | 26% |
| Spending time with brothers/sisters/other relatives | 20% |
| Watching TV/movies | 19% |
| Attending religious activities | 16% |
| Shopping | 10% |

On average, a Kenyan teen can speak 3 languages and a Ugandan and Tanzanian teen can speak 2 languages – these are more languages than the global³ average teen can speak. Majority of Kenyan (80%) and Ugandan (88%) teens believe that being able to speak more than one language is important for success.

2.2: How can we characterize this generation

Kenyan teens are generally optimistic about the future. They also believe that they are more accepting of diversity than other generations.

More important than the desire to gain wealth and material things, this generation believes that a healthy, fair and peaceful planet is more important than wealth.

Family and community are still very important to this generation as they feel that their families are one of their highest priorities. Conversely they disagree with the statement that it is up to each individual to ensure their own safety and success.

Chapter 3: How to connect with teens as a marketer

3.1 Above the Line Channels

The top two ways that teens prefer to get news and information about current events is via TV (58%) followed by via radio (33%). Correspondingly, the two best ways they would recommend for a company to let them know about important information such as discounts, sales, new products, etc., is TV (54%) and radio (35%).

On a national level, Citizen TV was most mentioned as the favourite station, with KBC receiving the second highest number of mentions.

Table 6: Favourite TV stations

| | |
|--------------------|-----|
| Base: Total Sample | 800 |
| Citizen TV | 77% |
| KBC | 39% |
| Nation TV | 24% |
| KTN | 20% |

On average, Kenyan teens spend 95.60 minutes daily watching television. This is very close to the global average – 99.64 minutes.

In terms of radio however, Kenyan teens spend significantly more time listening to radio (109.48 minutes) than the global average teen (38.41 minutes).

Therefore, for marketers looking to target the teens using above the line channels, TV and radio would be the recommend channels as opposed to billboards, magazines, newspapers, fliers, etc.

3.2. Digital channels

Internet and mobile usage

While internet activity is lower among our teens as compared to the global average, mobile usage is very high in Kenya. Kenyan teens spend on average 15.84 minutes on the internet per day as compared to the global average teen – 149.67 minutes.

However looking at mobile usage, Kenyan teens spend 36.11 minutes talking on a mobile phone which is relatively higher as compared to the global average – 32.77 minutes.

Texting on the other hand appears to be more popular among the global average teen – 41.98 minutes per day – as compared to the average Kenyan teen – 19.09 minutes.

Looking at social networking sites, teens have on average 143 friends/followers on social networking sites.

Table 7: Friends/follower/fans on social networking sites

| | |
|---|-----|
| Base: Total sample | 800 |
| Friends I see every day/school friends | 20% |
| Girlfriend/boyfriend/spouse | 5% |
| Friends I've never met | 10% |
| Parents/siblings/grandparents/other relatives | 19% |
| Brands or products | 1% |
| Magazines/newspapers | 1% |

Chapter 4: What to say to teens when you reach them?

In order to effectively communicate with teens, one needs to understand *what's hot and what's not* among them. In order to understand this, we have used an index – the TRU Trend Arc™ Index Score²

Technology

Social networking sites like Facebook is the trendiest thing in the technology sector with an index of 23, followed by online photo sharing at an index of 9. DVR (-47), podcasting (-32), virtual worlds (-30) and blogging (-20) are not yet 'in' among Kenyan teens but may trend in in the future.

Activities

Teens in Kenya are into being on a sports team (71) and going to religious services (76). As we saw earlier, listening to radio is very popular among teens with an index of 76.

An interesting trend that is coming in is dieting (66) as this has not been traditionally a trend in Africa.

Issues

Eating healthy is gaining popularity among teens in this generation (76). This is an emerging trend even among the older generation as evident in other research projects done. Even though there are no findings to prove that people actually eat healthy, consumers may in the future begin to look carefully at the nutritional composition of what they eat.

Summary and conclusions

Teens represent an important consumer segment that should not be ignored by marketers and companies. This is because, firstly, the teen population is much larger in East Africa relative to teen populations in other parts of the world such as the US and Europe. Secondly, even though most of the teens interviewed are not earning a salary, they nevertheless have an income source – spending money given to them by their parents/guardians and other relatives. Thirdly, it is at this life stage that one is beginning to form patterns and behaviours; therefore a brand needs to connect with teens at this early stage. Fourthly, teens are the future household decision makers, and therefore the need to make a lasting relationship early in life.

For a marketer seeking to communicate with teens through above the line channels, television and radio would be the recommended ways to reach them as these two channels are the most widely used to source information by teens. In regards to digital communication, mobile communication would be more effective as compared to communication via the web as teens spend significantly more time on their mobile phones texting or chatting than online.

Some of the hot topics among teens today are social networking and online photo sharing, being in a sports team, religious services, listening to radio, dieting and eating healthy.

References and definition of terms:

¹Lori S. Ashford, 2007 *Africa's Youthful Population: Risk or Opportunity?* (Washington, DC: Population Reference Bureau, 2007)

²TRU Trend Arc™ INdex Score – We ask the respondents on a 4-point scale what is ‘on the way in’, ‘already in’, ‘on the way out’ and ‘already out’. An Index score of greater than zero shows that the item is more in than out, while a negative number reflects the opposite. A near-zero score means that the item is either polarizing or not that exciting

³Global in this case encompasses the following countries:

- | | |
|-------------------|--------------------|
| 1. Australia | 20. Norway |
| 2. Brazil | 21. Philippines |
| 3. Canada | 22. Russia |
| 4. China | 23. Saudi Arabia |
| 5. Czech Republic | 24. Senegal |
| 6. Denmark | 25. Singapore |
| 7. Egypt | 26. South Africa |
| 8. Finland | 27. South Korea |
| 9. France | 28. Spain |
| 10. Germany | 29. Sweden |
| 11. Ghana | 30. Taiwan |
| 12. Hong Kong | 31. Tanzania |
| 13. India | 32. Thailand |
| 14. Indonesia | 33. Uganda |
| 15. Italy | 34. UAE |
| 16. Kenya | 35. United States |
| 17. Malaysia | 36. United Kingdom |
| 18. Mexico | 37. Vietnam |
| 19. Nigeria | |