# MEDIA CONSUMPTION IN AN EVOLVING DIGITAL WORLD: MILLENNIALS AND DIGITAL NATIVES' CONSUMPTION HABITS AND IMPLICATIONS FOR LEGACY MEDIA IN EAST AFRICA



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DEUTSCHE ZUSAMMENARBEIT

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# EXECUTIVE SUMMARY

Technology has led to a paradigm shift for industries and consumers alike, altering the way that businesses operate. Traditional media business models have thus been rendered less competitive by the emergence of the digital platforms that are targetcasting and delivering content to niche audience segments. The competition for audience from these emergent digital platforms has not only occasioned decline in revenues for the legacy media but also audience fragmentation.

**The biggest puzzle for media executives today is the bulging youth population that is characterised by unique and fluid consumption and lifestyle characteristic**s. Digital-native content producers have leveraged these unique and fluid consumption behaviours of the millennials and generation Z (Gen Zs) to stake a claim in advertising. They have done this by targeting the young demographic with targetcast content that is cheap to produce but of interest to niche audiences, which are then clipped away from legacy media. Targetcast content and the audiences it attracts appeals to advertisers because of the ability to deliver a more predictable audience, with a higher percentage of likely product buyers.

There are three key factors underlying the reason why this clipping off of young audiences is so financially devastating to legacy media in terms of advertising: 1) First and foremost, advertisers want to reach young audiences (18-34, most and 18-49 second best) because young people do not have established brand preferences and therefore are more susceptible than older people to advertising; 2) young people in those age groups are more desirable to advertisers because they spend a higher percentage of their income, than older people, on consumer goods, particularly if they have children in their households; and 3) because almost any audience clipped off by narrowcasting is a "higher quality" audience for most advertisers than a general legacy media audience.

Because of this, **advertising revenue has become so fragmented that as legacy media's main source of revenue, it no longer guarantees viability**. So even as media consumption in East Africa has increased and the advertising market expanded, audience fragmentation and proliferation of media outlets has considerably reduced the advertising dollars that go to media houses. Further, the industry continues to be constrained by considerable challenges, such as limited sources of commercial advertising and content monetisation as well as low disposable income among the target population. These factors exacerbate the scarcity of sustainable advertising revenues.

As news and information consumption habits change, it is increasingly harder to attract the attention of younger audiences. While there are fewer comprehensive studies on the consumption of media among the youth, as well as the key differences between the Millennials and Gen Zs, more so within the African context, this demographic is relatively important given that most of the African countries have a big youth population.

It is against this backdrop that the Media Innovation Centre at Aga Khan University's Graduate School of Media and Communications (GSMC) undertook this survey to aid media houses understand millennials and Gen Z's media consumption habits as a possible pathway to developing content that would engage them and programming that will address their needs. The study adopted three approaches: (1) quantitative methods, specifically a survey questionnaire administered through Computer-Assisted Personal Interviews (CAPI) with the Gen Zs (18 – 24) and millennials (25-35) comprising a representative sample of 1,200 per country for the three countries; (2) qualitative methods which involved Focus Group Discussions (FGD) with the youth and spread across the regions/zones in these three countries and (3) digital tracking of the respondents to establish consumption patterns and content consumed. In terms of quality assurance and control measures, a well-planned system of procedures, performance checks, quality audits, and corrective actions was put in place to ensure that the data produced throughout the study was of the highest achievable quality. In this regard, the key areas of assessment life cycle that passed through an examination of quality include: sampling, instrument design, scripting, recruitment and training, fieldwork and site visits, data analysis and processing.

## The findings

Kenyan millennials and Gen Zs are relatively highly educated and more than 50% have college and university education. Majority (66%) are employed with 34% of those employed in self-employment. More than half (52%) of the millennials and Gen Zs earn between KES 10,001 and KES 40,000 and only 5% earn above KES 70,000 per month and none indicated that they earn more than KES 150,000. The study specifically sampled millennials and Gen Zs in urban areas and these findings are representative of the urban population of this demographic.

**The top three motivations to consume news are to gain awareness of current issues/ affairs, to be knowledgeable and to attain their personal goals in life**. Even though these millennials did not rank entertainment as a top motivation for news consumption, generally their response appears suggest that they prefer that any content including news and current affairs content to be entertaining. Moreover, slightly more millennials compared to Gen Zs are motivated to consume news because of attainment of personal goals in life.

These millennials and Gen Zs are more concerned about the way they communicate, their dressing and family and less concerned about their tribes, where they work, their weight and understanding of current issues. Twenty percent or more of the millennials and Gen Zs have had accomplishments in critical aspects of their lives such as completing their education, starting their careers, finding out who they are and becoming financially independent, with a further 11% indicating that they have since accomplished the feat of starting their own businesses. Despite accomplishments in different aspects of their lives, t**he findings also indicate that these millennials are ambitious and serious about wealth creation and see the media as not doing enough in terms of providing content that addresses two critical issues in this area: making money and how to become financially independent**. They noted that news media need to cover more of these two issues, which seem to be in line with their top two career and life aspirations: getting their dream jobs and making money.

Millennials and Gen Zs predominantly find themselves consuming entertainment, celebrity news/gossip and profiles, general current affairs, and political news content. E-books, non-news content/blogs/articles are the least consumed content while dramatic content that present storylines is consumed by almost 20% of the respondents. Further these millennials and Gen Zs prefer videos and pictures, and the findings suggest that they do not consider brevity, exhaustiveness, elaborateness, adequacy, and elements of progressiveness in content they consume. **The key characteristics that rank highly in their consideration of the content to consume are attractiveness of content, availability and reliability, relevance, and affordability and how interesting the content is**. Attractiveness has been conceptualised in line with previous studies to refer to user added values such as technological aspects that allow for interactivity and co-creation, and most importantly potential for usage[i]. Suffice to note, millennials and Gen Zs have a higher proclivity for content that allows them to be part of the content co-creation and content that appears to be easy to put to use within the context of progress and enjoyment.

**Close to half (48%) of all the surveyed millennials and Gen Zs have paid for content and a third of those who reported paying for content have paid for political and current affairs content, and slightly more than a third indicated that they have paid for entertainment-related content**. The findings also suggest that payment for content by millennials and Gen Zs is a recent trend, with 50% reporting that they have been paying for content only in the last one year and 21% reporting that they have been paying for content only in the last three months. These are very encouraging trends, especially coming against the backdrop of trends in the media that have seen media organisations in Kenya adopt different consumer payment models on their digital platforms.

Generally, the majority of the millennials and Gen Zs in the survey who said they pay for content are paying between KES (Kenya Shillings) 11 and 100 per day, but a significant percentage of 46% pay between KES 11 and 50. The fact that these youths are already paying what seems to be a significant amount per day relative to what the Kenyan media that have paywalls charge means that the media can work around content that these millennials can pay for, especially if the media gets to respond to their needs and wants in their content offerings.

Content that is affordable, interesting, relevant, attractive, and available/reliable motivates the millennial and Gen Zs to subscribe or pay. These findings on content that they are motivated to pay for are consistent with findings in previous studies that established that some of the provocations for payment models by the youth include reduced friction in access, shared and flexible payment models and packages that are bundled together to offer multiple content offerings on a single platform.[i]

Even though the millennials and Gen Zs seem to be influenced to consume the content they consume by headlines and peers, the journalists who authored the stories and the reputation of the media house publishing it are factors they consider in the choice of content they consume. These findings seem to suggest millennials and digital natives' proclivity to click-bait content, but also allude to the fact that media houses can leverage their journalists' reputations and build credible brand reputations with which this demographic can easily identify. The findings further indicate that even though the millennials and Gen Zs would want to consume news, movies, documentaries, sports, telenovelas, and longer in-depth features that give broader context to issues, they reported that they would prefer such content to be empowering, entertaining, and address issues of employment opportunities and business-related topics.

A third of Millennials and Gen Zs describe themselves as subscribers to most of the social media platforms, a significant number describe themselves as consumers who enjoy watching TV, while a good percentage describe themselves as always being the first among peers to interact with new information on current happenings.

TV pips social media as the most relied on platform and the top four elements that attract millennials and Gen Zs to the choice of TV news brands that they consume are credibility and reliability, how educative and entertaining the content is, updates on current affairs and the competence and professionalism of journalists. These top elements used to discriminate on what brand to consume seem to suggest that for TV brands these millennials and Gen Zs are looking for more than entertainment. Nevertheless, the study's findings show that opinion on **what TV brands need to attract young audiences varies, with no single characteristic identified by more than a third of the respondents as important to them**. However, it does appear that millennials and Gen Zs feel that TV brands should focus more on youth empowerment and educative content to attract the youths.

Unlike TV that has one dominant brand in Citizen TV, radio seems to have a narrow gap between the top radio brands and the rest. The top four elements that attract millennials and Gen Zs to different radio brands are educative and entertaining news content, credible and reliable news content, updates on current affairs and competent and professional journalists. Further the findings indicate that **for radio to attract more youths to its content, stations should work on having more educative and empowering content, make content more entertaining, and work on content that is big on current affairs**. Compared to TV, the need for Apps to access radio content ranked highly for the respondents as an area that radio can work on to attract more youths.

Whereas newspapers have suffered reduction in circulation, the findings indicate some encouraging signs as only 49% of the respondents indicated that they do not read any newspaper brands. The reasons for choosing different newspapers brands for consumption are generally the same as the reasons for TV and radio, with credibility and professionalism being the main reasons. The findings also suggest that the respondents are of the opinion that **newspapers need to work harder to attract advertising about job opportunities, something radio and television cannot offer effectively, if newspapers want to attract young audiences.**

Digital native news sites are the most consumed and accessed, but the least relied on for news and entertainment. The findings also indicate that social media platforms are critical as the first point of news encounter with news, as 73% of the surveyed millennials and Gen Zs reported that every time, they log onto the social media platforms they follow the alerts and/or links of news stories to legacy media news websites. **TV is the most trusted media, but most millennials and Gen Zs consume news and media content on mobile phone**s, which calls for strategies to target millennials and Gen Zs with content that is native to mobile phone consumption.

The Majority of the millennials and Gen Zs consume news on legacy media online platforms, with close to 50% reporting that they do so daily. Further, more than 50% of the respondents reported that they find news on the legacy media online platforms to be relevant to them, credible, reliable, and trustworthy. However, **more than 40% were either indifferent or disagreed that news on the online platforms of legacy media is relevant, credible, reliable and trustworthy**.

The study concludes millennials and Gen Zs consume news across multiple platforms, which complement each other. Close to two thirds of the surveyed millennials and Gen Zs agreed that they consume news and information content from both the digital media and mainstream/legacy media platforms like radio, TV and newspapers. Moreover, most still go to legacy media digital platforms from social media and other sites, which situates social media in a very critical spaces as the first point of news encounter, a situation that should inform strategies adopted by legacy media in the attempt to target this demographic more. Previous studies have suggested legacy media houses should produce content that is native to social media and mobile phones to save these millennials and Gen Zs the inconvenience of moving from the interesting platforms that they are more attuned to.

Finally, 75% of the surveyed millennials and Gen Zs spend more than KES 1500 per month on internet-related consumption, either for buying bundles or for paying content, with 15 percent of these spending more than KES 3,000 per month. These findings, when looked at against the backdrop of the current subscription rates by media houses in Kenya, suggest that media houses can tap millennials and digital natives' current spending to offer competitive banquets of content that they can afford. In a nutshell, media houses can leverage the millennials and digital natives' consumption habits, what they would want to consume more in the legacy media, current spending habits with recourse to data cost and preference for social media as the first point of news consumption to strategies content and programming offerings that the youths can pay for.

# 1.0
# BACKGROUND

## 1.1. Introduction

Most young people have generally been found to have universal needs which include "saving money, buying a house, family, friends, creativity, kindness, caring, being fulfilled and having new experiences." In attaining these universal goals, young people are motivated to consume news and generally media along the themes of progress and enjoyment which cut across all their goals and aspirations[i] . Enjoyment and progress anchor granular understanding of how these young people consume and engage with news.

Media viability studies have focused on media as institutions and how innovative and sustainable they are in the current digital age, while media organisations have focused their audience research on consumers of media content as purchasers of values or as numbers to leverage on advertising rates. However, the last 10 to 15 years have seen the emergence of a generation whose behaviour is not only unique, but also more attuned to the nuances of the evolving digital world, a situation that presents new dynamics. Studies have shown that young media consumers, especially the Gen Zs and the digital migrants (millennials), are ardent consumers of the media that gratifies their needs for progress and enjoyment[ii], and that digital natives tend to be more experienced with interactive content with a stronger positive effect of perceived interactivity. The perceived interactivity by these digital natives is good news for the advertising industry as it consequently leads to positive attitudes and adoption behaviours among the digital natives. However, these studies on interactivity and the two themes of progress and enjoyment have only focused on developed markets and it is important to focus on emerging markets in the developing world. Media organisations in the emerging markets are grappling with issues of monetization of content as a response to the growing desire by the audience to get content via the digital platform (IPSOS, Sep 2019). This calls for an understanding of the audience, more especially the young audience that has migrated to the digital platform and the digital natives.

This study presents findings on who these young consumers are, that is, their world and what they are seeking in life as a basis for analysing what role news and the media plays in their life. In addition, the study presents the content these millennials and Gen Zs consume, their media consumption habits, the platforms they prefer, content payment behaviours and their perception of legacy media.

## 1.2. Understanding of Generation Z and Millennials

Currently the youth aged 18 – 35 can be categorized as Generation Z (individual born between 1997 – 2012) and Millennials (individuals born between 1981 – 1996). Deloitte Insights categorises millennials as the youths born between 1983 and 1996 while Gen Zs as youths born between 1997 and 2009[iii]. In the current study the researchers specifically targeted Gen Zs between the ages of 18 and 24 and categorised 25 – 35 as millennials.

**Generation Z (Digital Natives)**

This generation was born in a period of enhanced social networking and digital media with likes of Facebook, Instagram, Twitter, WhatsApp, Tiktok, YouTube and many more social networks being launched in their era. Technology has become their main medium of socialisation. They are well versed in technology language and use it to build an engaging environment[iv]. They learn differently compared to other generations; they prefer information that is important, practical, immediately applicable, active, and enjoyable. They are also less socially adept and find it difficult to relate with others. They express themselves through social platforms and are influenced by other people's lifestyles through social media. In the current study Generation Z also means the digital natives.[iv]

**Millennials**

This generation is generally marked by elevated usage of and familiarity with the Internet, mobile devices, and social media[iv] . Between the 1990s and the 2010s, people from the developing world became increasingly well educated, a factor that boosted economic growth in these countries. Nevertheless, the Great Recession and COVID-19 recession have had a major impact on millennials because they have caused historically high levels of unemployment among young people.[v]

## 1.3. Digital Media Consumption

Digital media is growing fast in East Africa with traditional media organisations creating online platforms and digital native news media organisations taking firm root. Mobile devices have taken over as the preferred medium of consuming content online. More East Africans are online driven by the increased access to smartphones, whose penetration rates stand at 61%, 54%, and 43% for Kenya, Tanzania and Uganda, respectively. Further, Internet usage is high with Kenya ranking above the African average, while Uganda and Tanzania have witnessed tremendous growth in the last few years. The internet penetration rate as it is today captured in the Table 1 below.

*Table 1: Internet Penetration in East Africa (Source: World Internet Statistics)*

| Description | Population (2022 Est.) | Internet Users 31st Dec 2000 | Internet Users 31st December 2021 | Internet Penetration | Internet Growth % 2000 - 2021 | Facebook subscribers 30th April 2022 |
|---|---|---|---|---|---|---|
| Kenya | 55,752,020 | 200,000 | 46,870,422 | 85.20% | 23335% | 12,445,700 |
| Tanzania | 61,498,437 | 115,000 | 23,142,960 | 37.60% | 20024% | 5,223,000 |
| Uganda | 47,123,531 | 40,000 | 18,502,166 | 39.30% | 46155% | 3,328,000 |
| TOTAL AFRICA | 1,373,486,514 | 4,514,400 | 590,296,163 | 43.00% | 12975% | 255,412,900 |
| Rest of World | 6,502,279,070 | 356,471,092 | 4,463,594,959 | 68.60% | 88% | 2,475,026,941 |
| WORLD TOTAL | 7,875,765,584 | 360,985,492 | 5,053,891,122 | 64.20% | 100% | 2,730,439,841 |

The Kenyan media topography has undergone several significant transformations such as migration to terrestrial digital broadcasting in 2015 and the emergence of on-demand video platforms. Key transformational changes include: (1) Enormous growth in the number of mobile internet users over the past five years. This has facilitated the growth of internet penetration which has consequently influenced the supply and demand for media in the region; (2) increased social media sites subscription in the region that has made it easy for users to share events live as they happen as opposed to waiting for the legacy media to 'break' it; (3) efforts by media outlets and content creators to monetise content and address the dwindling advertising revenues occasioned by the digital disruption; and (4) the emergence of digital native news media organisations.

The transformations above made it necessary for the media to focus on new audience segments, especially the technoholics and the digital natives. To a large extent young people have become the subject of media consumption, especially news media content. Studies have also shown that young media consumers are ardent consumers of the media that gratifies their needs for progress and enjoyment[i] and that digital natives are more experienced with digital content and tend to have a stronger positive effect of perceived interactivity. The perceived interactivity by these digital natives is good news for the advertising industry and the media as studies have shown that "perceived interactivity mediates the relationship between actual interactivity and purchase intention, the attitude towards the brand" and websites like digital native news sites.[vi] However, these studies on interactivity and the two themes of progress and enjoyment have only focused on developed markets, and it is important to focus on emerging markets in the developing world. Media organisations in the emerging markets are grappling with these issues of monetisation of content as a response to the growing desire by the audience to get content via digital platforms. This calls for an understanding of the audience, more especially the digital migrant audience and the digital natives.

## 1.4. The Research Problem

The media in Sub Saharan Africa just like the media in other emerging and developing economies is experiencing decline in revenues in the wake of advances in digital technologies, which have disrupted the industry business models (Wasserman & Benequista, 2017). Advertising as the main source of revenue no longer guarantees viability and whereas media consumption in East Africa has increased and the advertising market expanded, audience fragmentation and proliferation of media outlets have increasingly reduced the ad revenue share for individual media houses (Caribou Digital, 2019; PWC, 2018).

Hollifield and Schneider (2017) identify the hypercompetition in the advertising market, excessive investment in the media, limited sources of commercial advertising and low disposable income among the target population as some of the factors that exacerbate the dearth of sustainable advertising revenues. With all these challenges, the media has strayed its focus on new audience segments, especially the digital migrants and the digital natives. To this end, young people have become the subject of media consumption, especially news media content. The mainstream media is struggling with the challenge of attracting the attention of the digital natives who have "grown up with the distractions and diversions of digital media" and their fluid consumption habits are problematic for legacy media struggling to monetise content that it has been giving audiences for free.[i]

Besides looking at consumption habits, studies have sought to understand who young people are and what they are seeking in life as a basis for understanding what role news plays in their lives. The emergence of digital media platforms not only means declining revenues for the legacy media but also audience fragmentation and increased competition from new entrants, mostly digital news sites. As such, the media in East Africa is plagued by declining revenues occasioned by the digital disruption and what disruptive innovation scholars call insurgents or entrants who enter the media ecosystem to serve niche or previously neglected markets, consequently attracting ad revenues that would otherwise be going to the traditional news media organisations.[vii] These entrants threaten the incumbent[iii] media houses because they target audiences with content that is predominantly non-public interest content, but nevertheless attractive to a large number of consumers that advertisers are find lucrative. Consequently, these insurgents have eaten into the ad share, making advertising insufficient as a guarantor of financial viability for news media organisations.

Content monetisation challenges and the change in consumer behaviour, especially young consumers, call for a more granular understanding of the target audience, especially millennials and digital natives, who are unique and more attuned to the nuances of the evolving digital world. As news and information consumption habits change, it is increasingly important to understand the audience's consumption habits to develop content that appeals to them.

## 1.5. Study Objectives

The overarching objective of the study is to determine how legacy media organisations can attract the young generation that has grown up with choices, different formats, platforms and the distractions and diversions of digital media. The study provides data for reliable assessment of the consumption habits of the young consumers of the media in East Africa and the specific objectives are broken down into the five themes below:

1. Theme 1: Identity of young East Africans?
2. Theme II: Nature of content millennials and Gen Zs consume
3. Theme III: Media habits and behaviour of millennials and Gen Zs
4. Theme IV: Platforms relied on to consume media content
5. Theme V: Perception of legacy media

# 2.0

# OVERALL PROJECT APPROACH AND METHODOLOGY

## 2.1 The Methodology

The study was executed through three key approaches as described below.

| Approach | | |
|---|---|---|
| Quantitative Approach | Qualitative Approach | Digital Tracking |

### 2.1.1 Quantitative Approach Explained

The study used a structured survey questionnaire to collect data that responds to the objectives and the five thematic areas. The questionnaire was administered through the Computer Assisted Personal Interviewing (CAPI) to the target population of Gen Zs and millennials drawn from mainly urban areas. With a tablet/phone, CAPI allowed the research assistants to conduct face-to-face interviews and uploaded the data to a central computer/ server using mobile data connection.

**Sample size**

The sample size was determined by estimating the proportion of the youth population that consume digital media. The population proportion was estimated to be around 50% (p=.5 maximum variability). The goal of estimating the true proportion p to an accuracy (that is, standard error) of no worse than 0.05, or 5 percentage points, from a random sample of size n was considered. The standard error of the mean is $\sqrt{(p(1 - p)/n)}$. Substituting the estimated value of 0.5 for p yields a standard error of $\sqrt{(0.5 \cdot 0.5/n)} = 0.5/\sqrt{n}$, and so the standard error $0.5/\sqrt{n} < 0.05$ was achieved.

The below Cochran equation shows the calculation of a representative sample for the proportions.

$$n = \frac{z^2 p(1-p)}{e^2}$$

Where n is the sample size, z is the abscissa of the normal curve that cuts off an area at the tails, e is the desired level of precision (in the same unit of measure as the variance), p is the estimated proportion of an attribute that is present in the population.

The desired level of precision (e) is set a $0.02829 = (Z \times 0.5/\sqrt{n}) < 0.05$.

Substituting the values:

$$n = \frac{1.96^2 \, x \, 0.5(1-0.5)}{0.02829^2} = 1200.01 \cong 1200$$

**Sample Breakdown**

The tables below summarise the sample breakdowns for the three countries:

**Kenya**

*Table 2: Sample Breakdown: Kenya*

| REGION | Error Margin (-+) | REGIONAL SAMPLE |
|---|---|---|
| COAST | ±7.975% | 151 |
| NORTH EASTERN | ±15.693% | 39 |
| EASTERN | ±10.757% | 83 |
| CENTRAL | ±7.366% | 177 |
| RIFT VALLEY | ±6.261% | 245 |
| WESTERN | ±15.693% | 39 |
| NYANZA | ±11.026% | 79 |
| NAIROBI | ±4.982% | 387 |
| TOTAL | ±2.829% | 1,200 |

*Quantitative sampling strategy*

The survey sampling design employed the use of a stratified multi-stage cluster sampling approach to ensure the resulting sample was representative of the youth populations in Kenya. The stratified cluster sampling approach incorporates a combination of stratified and cluster sampling methods.

Firstly, the country was implicitly stratified. Implicit stratification essential criterion is geographic, and the researchers stratified the important geographic sub-groups of the population such as urban-rural, administrative regions, ethnic subpopulations, socio-economic groups, and others. Because of this geographic property, implicit stratification is also highly useful even when the subject-matter of the survey is focused on a single topic such as media consumption habits.

Implicit stratification requires using random selection at the first stage of sampling. The procedure is simple to implement and entails, first, arranging the file of primary sampling units (PSU) in geographic sequence. In Kenya the sequence was county by region followed by sub-county by county and finally ward by sub-county. Kenya consists of eight regions (eight stratum), which constitute the highest administrative (geographical) units and the current study treated these eight units as independent and mutually exclusive subsets of the population and formed the first phase of stratification. A four-stage cluster sampling process was performed within each stratum.

A cluster is a natural grouping of people, for example, towns, villages, schools, streets, and households. In the multistage sampling, the resulting sample was obtained in four stages, with the nested or hierarchical structure of the members within the population being considered. Population members were arranged in clusters. The method is based on the random sampling of clusters at each stage, with the sampled clusters nested within the clusters sampled at the previous stage.

The first stage of cluster sampling involved a random sample of 24 counties in Kenya that were within the (eight stratum). The number of clusters selected within each stratum was determined on the basis of ensuring at least each stratum had one third of the total clusters selected. This increased the reliability of the sample due the likelihood that people living in the same cluster tend to be homogeneous or to have more or less similar characteristics.

In the selection of the clusters, probability proportional to the population size of the clusters was implemented in each stage to ensure that from each cluster a proportionate sample was drawn in order to avoid sampling bias.

Steps used on the first stage clusters sampling procedure are presented below:

- The first procedure was to list all the counties with their corresponding measure of size (population size) for each domain as a separate stratum.
- Starting at the top of the list, the cumulative measure of size was calculated and entered in the column next to the measure of size for each unit.
- A Sampling Interval (SI) was then derived by dividing the total cumulative measure of size for the domain or stratum (M) by the planned number of counties to be selected (n) in that stratum. i.e., SI=M/n
- A random number referred to as the Random Start (RS) was then selected as a function between 1 and the Sampling Interval (SI) to get the first random counties to be selected. This was done by comparing this number with the cumulative measure of size column. The unit within whose cumulative measure of size the number (RS) falls represented the first sample unit.
- The second county to be selected was the one at which the immediate cumulative measure of size was equal to or greater than the sum of RS and the Sampling Interval (SI), that is, RS + SI
- Subsequent units were chosen by adding the Sampling Interval (SI) to the preceding number i.e., RS + SI*2, RS + SI*3 etc. The procedure was repeated till the 24 selected.

Similar procedure was iterated for the second stage cluster selection (districts and sub-counties).

Once the random selection of the first and second stage clusters through the probability proportion to size procedure had been implemented, the total sample size in each region was proportionately allocated to the counties and the second stage clusters (districts and sub-counties) to reduce the chance of having a disproportionately large (or small) number of the sample units selected from the sub-population.

To select third stage clusters within the randomly selected two-stage clusters, the researchers listed all the stage-two selected cases and randomly selected using the simple random sampling (SRS) function in MS Excel. A random number was generated using the RAND() function for each district/sub-county in the frame, which was then sorted in ascending order. The sub counties and districts that appeared first were chosen to form the sampled sub counties/districts. The number of clusters chosen within each third-stage cluster was based on ensuring a minimum sample size of 8-15 households, as people living in the same cluster are likely to be homogeneous and have similar characteristics.

In a nutshell, the following measures were taken to ensure that the sample arrived at was as representative as possible of the larger population and therefore provides useful and accurate statistics.

i. Use of random sampling in selection of youth to be included in the survey and by extension ensuring the counties sampled are adequately representative of the population.
2. Coverage of the various sub-groups to ensure that key segments of the population were represented.
3. The error of non-response was minimized by ensuring maximum participation of survey respondents and therefore a good representation.

## Household selection

Households were selected using a household selection grid. Once the research team arrived at the sampled ward, the supervisor identified a starting point; typically, this was a street or a conspicuous landmark within the ward. With the selection of a landmark as the starting point in the Enumeration Area (EA), the Enumerators randomly selected a household, then guided by the skip interval and left-hand rule, sampled other households to be included in the survey. For urban areas, the skip interval was four and for rural areas, the skip interval was three. In urban areas with flats, only one interview was conducted per flat.

During the data collection exercise, the following household selection rules were adopted:

- At the starting point, the first household to be interviewed was randomly selected. This was done using the date score, whereby the enumerator added the two digits of the date of the interview, to determine the first household (from the landmark) to be interviewed.
- The enumerator, guided by the left-hand rule and a skip interval, then went around the Enumeration Area (anti-clockwise) selecting every third (rural) or fourth (urban) household after a successful interview.
- The enumerator continued calling at every third/fourth household in an anti-clockwise manner until all the allocated number of interviews for that ward had been achieved.

- In the eventuality that the enumerator got right around the street without having located enough households to make up the sample, the enumerator crossed the road outside the household originally selected, and started to go around the neighboring street, again anti-clockwise, sampling every third/fourth household.
- If it so happened that a household was sampled and nobody was at home, or the occupants refused to participate in the survey, then the interviewer moved to the next household.
- Only one eligible respondent (18-35 years) was interviewed per household.
- All households sampled and visited were listed in a contact sheet to assist in quality control and back checks.

## Respondent selection

In the survey, the Kish Grid was used to select respondents at the household level. The Kish grid gives a procedure of selection and is intended to select persons within the household with equal probability. The enumerator listed all the eligible members of the household (in this case, persons residing in the household and aged 18 -35 years in a systematic order; by age such as starting with the oldest person; as well as gender for each eligible household member. A pre-assigned random number was then used to determine the household member to be interviewed. The kish grid functioned as follows.

- Using the scripted form, all members of the sampled household aged 18-35 years (starting with the oldest), were listed.
- The vertical number in the Kish grid was generated based on the total number of household members listed.
- The horizontal number in the Kish grid was generated using the last digit of the time the interview started (the minute digit).
- The system took the last digit of the time when the interview was started and find the same number in the top line of the Kish Grid below. It will then crosscheck that number with the last HH member listed, to pick the person to be interviewed. Based on this, the system will automatically pull the name of the household member, whose ID corresponds with the picked Kish number.
- If the picked person was not at home, the interviewer arranged to call a second time to interview that individual. If he/she was not there on the second occasion, another adult in the household was picked; by picking the listed person DIRECTLY ABOVE the person originally taken on even number dates or DIRECTLY BELOW on odd number dates.
- If that person was also not available, the interviewer will substitute with another household.

*Table 3: Kish Grid*

| | | | | Last Digit on Questionnaire serial | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| HH Member | Name/position | Age | Gender | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 0 |
| 1 | | | | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| 2 | | | | 2 | 1 | 2 | 1 | 2 | 1 | 2 | 1 | 2 | 2 |
| 3 | | | | 1 | 2 | 3 | 1 | 2 | 3 | 1 | 2 | 3 | 1 |
| 4 | | | | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 | 1 | 2 |
| 5 | | | | 4 | 5 | 1 | 2 | 3 | 4 | 5 | 1 | 2 | 3 |
| 6 | | | | 4 | 5 | 6 | 1 | 2 | 3 | 4 | 5 | 6 | 1 |
| 7 | | | | 3 | 4 | 5 | 6 | 7 | 1 | 2 | 3 | 4 | 5 |
| 8 | | | | 3 | 4 | 5 | 6 | 7 | 8 | 1 | 2 | 3 | 4 |
| 9 | | | | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 1 | 2 |
| 10 | | | | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 1 |

- All the above processes were automated and only required the input of household members and time from the interviewer.
- There was an automatic check to ensure the time input is accurate and correct.

### 2.1.2. Digital Tracking Explained

Digital tracking tools enables the capturing of data to drive intelligent strategies and develop rich online profiles and robust market segments. With a tracker, consumers' online daily routines, including time spent on apps/sites per vertical, and top apps by usage is enabled. Digital tracking provides the opportunity to obtain data from consenting respondents on consumption habits they cannot tell a researcher. The digital tracking phase was executed using a two-tiered strategy integrating both back-end tracking using a customised digital app as well as gathering the respondent's data using e-diaries. Cumulatively, digital tracking targeted 150 respondents in Kenya. Participants who met the following criteria were recruited for the digital tracking phase:

1. No close relative who worked in a research firm or media-related firm.
2. Not having participated in any media-related survey in the past three months.
3. Signed a consent form to allow for tracking of their devices and digital/social media accounts (adherence to the Data Protection Act 2019)
4. Have access to digital/online media.

Further, the surveyed respondents were youth aged between 18 – 35 years and drawn from both genders (equal distribution of gender was enhanced). The sample was based on the population of youth in the target counties.

**Sample Kenya**

The youth were randomly selected from the key towns in Kenya, that is, Nairobi, Mombasa, Kisumu and Nakuru.

| COUNTY | COUNTY GENERATION Z (18-24) YEARS | COUNTY MILLENNIALS (25-35) YEARS | COUNTY TOTAL: GENERATION Z (18-24) & MILLENNIALS (25-35) YEARS | SAMPLE |
|---|---|---|---|---|
| **KISUMU** | 162,526 | 204,920 | 367,446 | 16 |
| **MOMBASA** | 182,408 | 288,885 | 471,293 | 21 |
| **NAIROBI** | 712,532 | 1,172,123 | 1,884,655 | 83 |
| **NAKURU** | 298,260 | 389,182 | 687,442 | 30 |
| **TOTAL** | 1,355,726 | 2,055,110 | 3,410,836 | 150 |

### 2.1.3. Qualitative Approach Explained

Focus Group Discussions (FGDs) is an effective means to unearth diverse feelings, opinions and viewpoints at a group level because listening to others explaining their ideas and opinions induces cross fertilisation of ideas which gets further challenged and enriched in the group. FGDs aided in filling in the gaps by providing depth in responding to the objectives, corroborating the numeric data from the quantitative data and the consumption habits manifested in the digital tracking. The groups comprised 10 participants who shared common characteristics and on average took about two hours.

**General criteria**

The following was the standard criteria for recruitment to participate in the FGD:

1. Youth aged 18 – 35 years (There were separate groups for those aged 18 -24 years and those aged 25 – 35 years
2. Gender male and female (single gender groups)

As such the selection criteria was purposive in nature with the requirement that selection was limited to individuals who had access to some form of media, either legacy or digital, and each of them came from separate subregions as follows:

#### 2.1.3.1. FGD Distribution

A total of eight FGDs were conducted and were distributed as shown table 4 below:

*Table 4: FGD Distribution*

| Country | Group | Gender | Age | Location |
|---|---|---|---|---|
| Kenya | 1 | Male | 18 - 24 | Nairobi |
| | 2 | | | Mombasa |
| | 3 | | | Nakuru |
| | 4 | | | Kisumu |
| | 5 | Female | 25 - 35 | Nairobi |
| | 6 | | | Mombasa |
| | 7 | | | Nakuru |
| | 8 | | | Kisumu |

# 3.0

# THE FINDINGS

## 3.1. Theme I: Identity of Young Kenyan Media Consumers

It is critical for media brands to understand the young consumers of media content if the media is to address their consumption preferences and demands. To this end, the study sought to determine the status, identity, values, education and career aspirations, social networks, recreation, and hobbies/passions of millennials and digital natives. The study established that most the respondents are employed (self or another entity) and a majority (52%) earn between KES 10,001and 40,000. However, a considerable number (31%) are unemployed and whether employed or unemployed most of these young Kenyans are single. It is important to note that our sample was predominantly urban with a relatively higher proportion of highly educated, high socioeconomic status (SES) people than the country. These are important considerations when evaluating and applying these findings in media management. Suffice to note also is that the high SES respondents in the study represent the consumers advertisers most value and most want to reach. Their main motivation for news consumption is to be aware of current issues/affairs, acquire knowledge and attain personal goals in life. The findings further indicate that most of these young Kenyans are concerned about the way they communicate, their dress code and their families.

They also seem to have modest accomplishments as a majority mentioned that their main accomplishments include completing education, finding out who they really are, and becoming spiritually mature. The findings indicate that they would like the media to provide information that would help them make money, become financially independent, save for the future, and point them towards more recreational activities.

The study targeted millennials and Gen Zs living in urban areas but 5% of the respondents were from peri-urban areas. In terms of gender, 47% of the respondents were male and 53% female.

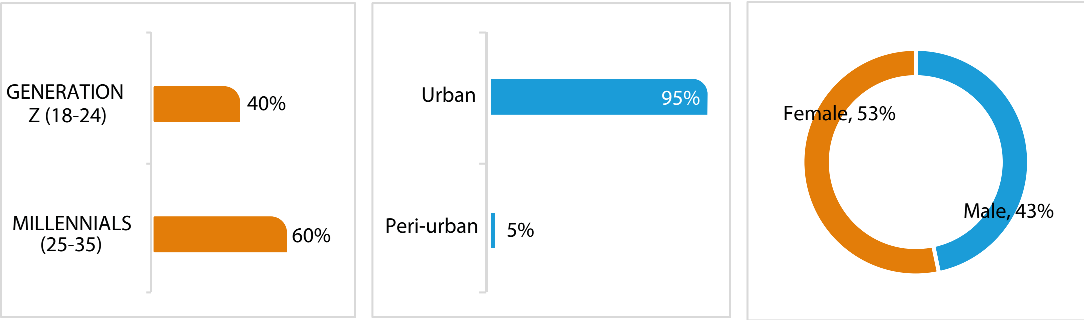



*Figure 1: Demographics of Target Respondents, Age, Gender and Location*

### 3.1.1. Level of Education

A significant number of the surveyed respondents indicated that they had attained post-primary education. Some 56% indicated that they had attained either college (35%) or university/post-graduate (21%) education.

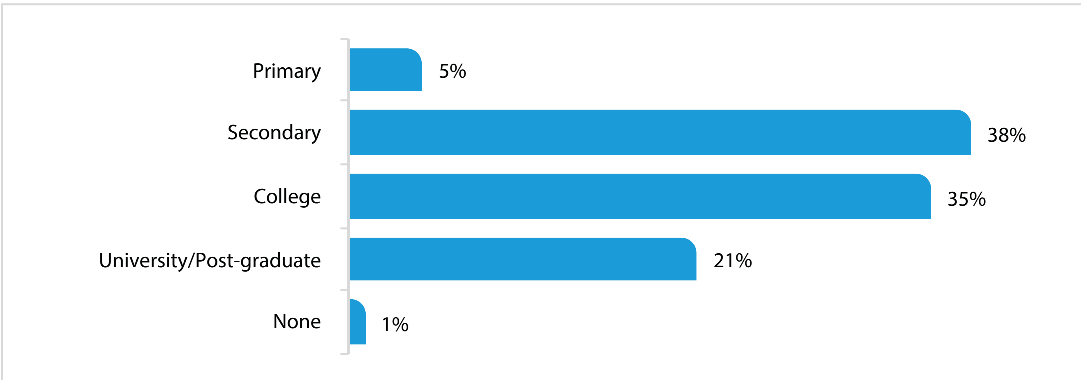



*Figure 2: Education Level of Surveyed Respondents*

### 3.1.2. Employment Status and Monthly Income

Majority (66%) of the surveyed respondents indicated that they are employed; either formal employment (31%), self-employed in the informal sector (23%) or self-employed in the formal sector (12%). However, 31% of the surveyed respondents indicated that they are unemployed as shown in figure 3 below.

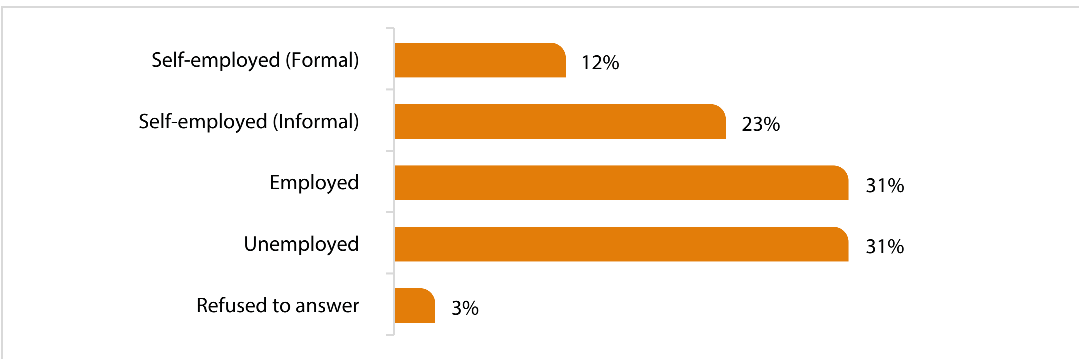



*Figure 3: Employment Status*

The findings indicate that almost a quarter of the millennials and Gen Zs (20%) earn less than KES 10,000 a month, while most (52%) earn between KES 10,001 and 40,000. However, whereas 11% earn between KES 40,001 and 70,000, only 5% indicated that their gross income is above KES 70,000 per month, and none indicated that they earn more than KES 150,000 per month. These findings suggest that a majority of media consumers in this demographic may not have the disposable income for a lucrative audience, but there are indications that with these figures, the media can be specific in content strategies and align content to what the current study has established as the needs this demographic want the media to address. With these levels of income it is also clear that these millennials and Gen Zs may not be good targets for advertisers selling luxury goods, but then studies have also shown that they probably spend a higher percentage of their income on consumer goods, so that makes them desirable audiences for advertisers, even if they do not have high incomes.

*Table 5: Gross Monthly Income*

| Gross Income | Percent |
|---|---|
| Under KES 10,000 | 20% |
| KES 10,001- 20,000 | 26% |
| KES 20,001 – 40,000 | 26% |
| KES 40,001- 70,000 | 11% |
| KES 70,001- 100,000 | 4% |
| KES 100,001-150,000 | 1% |
| KES 150,001 – 250,000 | 0% |
| Over KES 250,000 | 0% |
| No Answer | 12% |
| Total (n=1201) | 100% |

### 3.1.3. Marital Status

More than three in every five of the surveyed respondents reported that they are single (64%), while three in every 10 were either married (27%) or cohabiting (3%). On the other hand, 3% were divorced/separated.

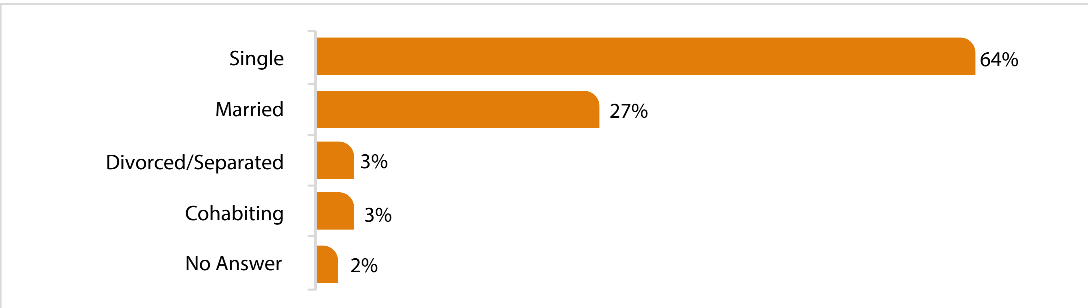



*Figure 4: Marital Status*

### 3.1.4. Motivation to Consume News

Most of the young Kenyans mentioned that they are motivated to consume news to gain awareness of current issues/affairs (52%), to be knowledgeable (46%) and to attain their personal goals in life (39%). It also appears that a significant number of millennials and Gen Zs look for entertainment in the news they consume, as 25% indicated they are motivated to consume news to escape from the limits of societal expectations and stereotypes.

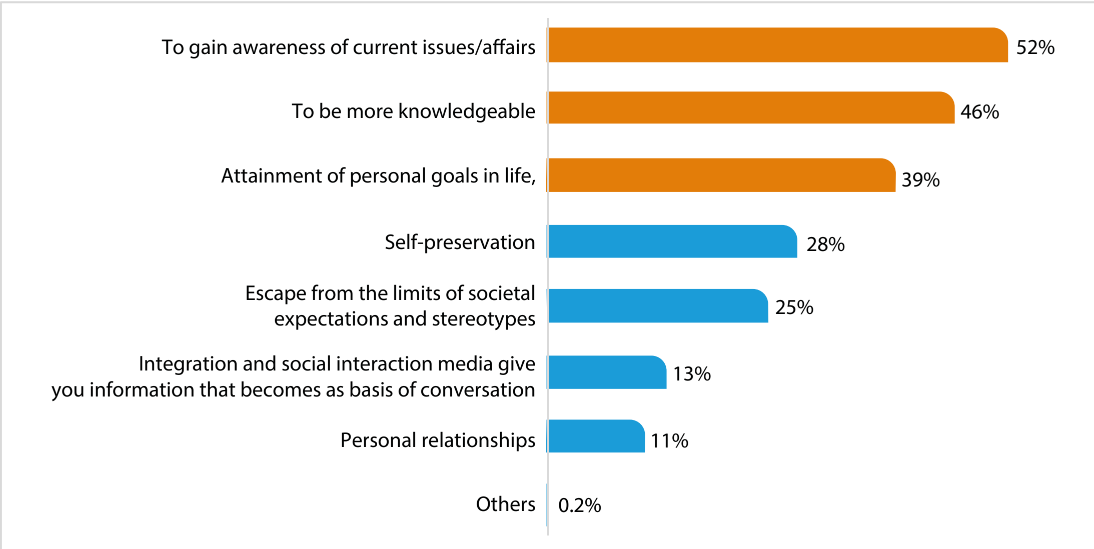



*Figure 5: Motivation to Consume News*

**Motivation to Consume News and Gender**

In terms of analysis by gender, while there are no big differences between males and female on the motivation to gain awareness of current issues/affairs, slightly more females (48%) than males (43%) reported that their motivation to consume news was to become knowledgeable. On the other hand, with regards to age, slightly more millennials compared to Gen Zs reported that they are motivated to consume news to gain awareness on current issues/affairs (53%); to be more knowledgeable (47%) and to attain personal goals in life (41%) as shown in figure 6 below.

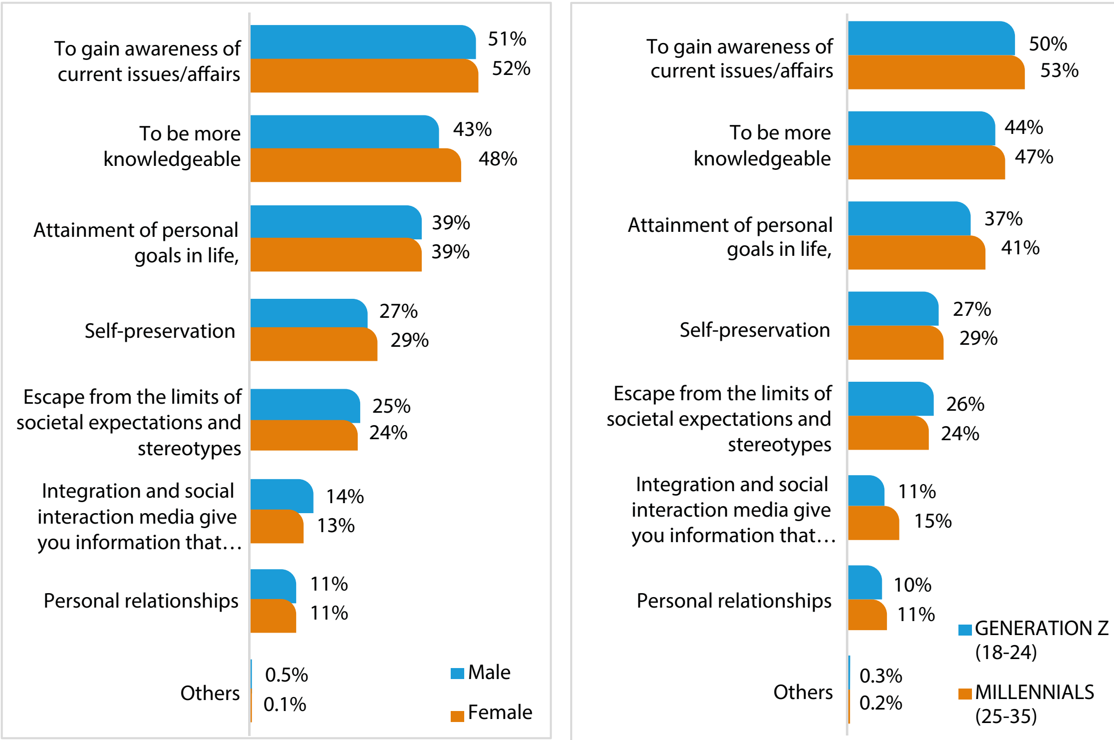



*Figure 6: Motivation to consume news by Gender and Age*

### 3.1.5. What Millennials and Gen Zs are Most Concerned About

A significant proportion of the surveyed youth noted that they are concerned about the manner in which they communicate (39%), their dress code (39%) and their families (36%). Tribe, where they work, their weight, their understanding of current issues and the schools they went/go to seem not to be their most important concerns, as those concerns were mentioned by 20% or fewer of all respondents as shown in figure 7 below.

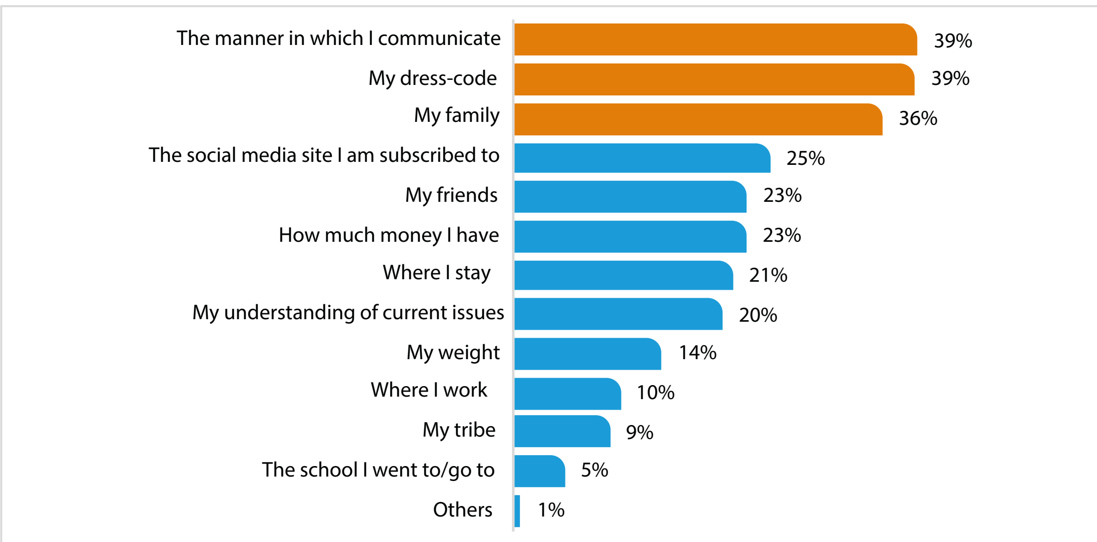



*Figure 7: Issues millennials and Gen Zs are Most Concerned about*

### 3.1.6. Accomplishments by the Millennials and Gen Zs

The study sought to establish the accomplishments attained by the millennials and Gen Zs. A considerable number considered finishing their education (34%), finding out who they really are (33%), and becoming spiritually mature (31%) as the top accomplishments they have had so far, with more than a third of the respondents mentioning these three. A further 21% mentioned starting their careers and 20% mentioned gaining financial independence as their accomplishments. However, only 1% mentioned they had bought a home. The details are shown in the table 6 below.

There were no major differences along gender or age. The findings seem to suggest that on the financial front a good number of respondents seem to be doing well, with 20% saying they had accomplished financial independence, 21% had started their careers, and 11% had started businesses.

*Table 6: Accomplishments by the Millennials and Digital Natives*

| Accomplishment | Proportion |
|---|---|
| Finished my education | 34% |
| Found out who I really am | 33% |
| Became spiritually mature | 31% |
| Started a career | 21% |
| Became financially independent | 20% |
| Followed my dreams | 18% |
| Became a parent | 16% |
| Enjoyed life before I got more responsibilities | 14% |
| Travelled to other countries | 12% |
| Got married | 12% |
| Started a business | 11% |
| None of the above | 8% |
| Cared for the poor and needy | 6% |
| Bought a home | 1% |
| Became famous or influential | 1% |

### 3.1.7. Issues Millennials and Generation Z (Gen Z) Need The Media to Cover

The surveyed respondents highlighted issues they need the news media to cover. The top three mentions by the respondents indicate that 61% would want the media to cover more content on making money, 56% want content on how becoming financially independent, while 37% would desire content on saving money and the needs of their families and friends. Figure 8 below with the details on the other needs mentioned by the respondents.

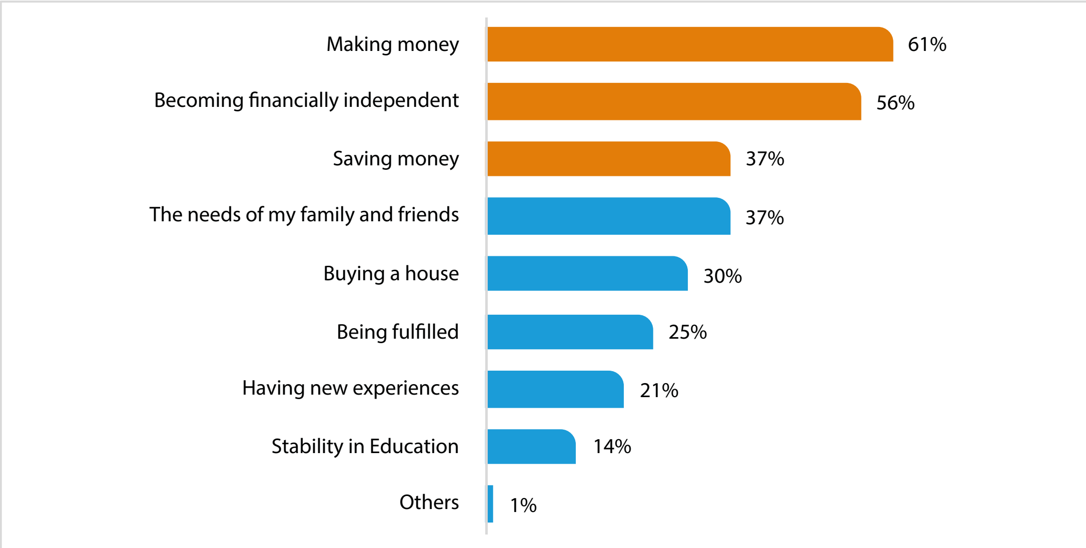



*Figure 8: Issues the Millennials and Gen Zs Need the Media to Cover more*

### 3.1.8. Millennials and Gen Zs' Aspirations in Education and Career

Most of the respondents (46%) indicated that their top career aspiration is to get a good job/dream job within the country and to make money (45%). Others top aspirations include venturing into entrepreneurship/starting own business (39%), pursuing further studies (33%) and getting a good job/dream job abroad (26%).

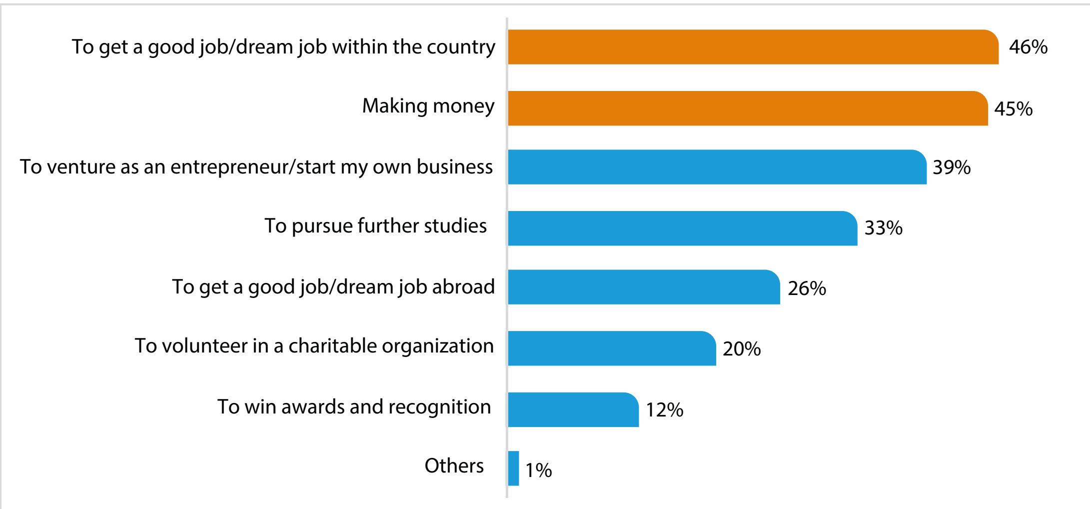



*Figure 9: Education and Career Aspirations*

The above findings suggest that given their aspirations, it does seem that millennials and Gen Zs natives perceive the media as very critical in helping them achieve their aspirations. This is underscored by fact that their aspirations of getting dream jobs in the country, making money and venturing into business would be enhanced by the kind of content they have predominantly mentioned as the content they would need the media to cover.

### 3.1.9. Life Values

The survey established that a quarter of the millennials and Gen Zs surveyed value honesty (25%), respect (18%), trust (15%), freedom (12%) and love (8%) as shown in figure 8 below.

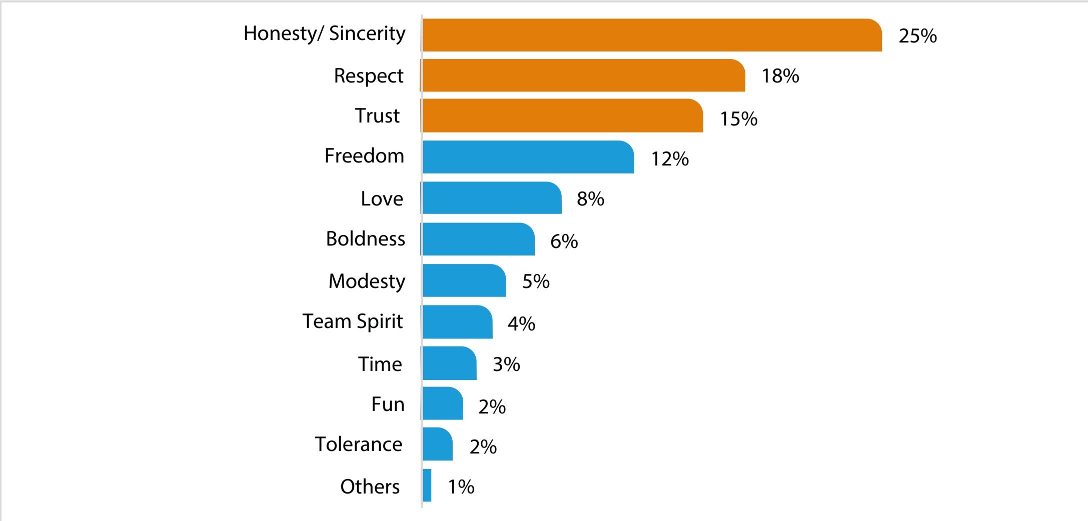



*Figure 10: Life Values*

### 3.1.10. Recreational Activities Engaged in

In terms of recreation activities, 58% of the surveyed respondents mentioned that they listen to music, 54% watch movies, 29% engage in sports while 27% hike/travel. The details are presented in the figure 9 below.

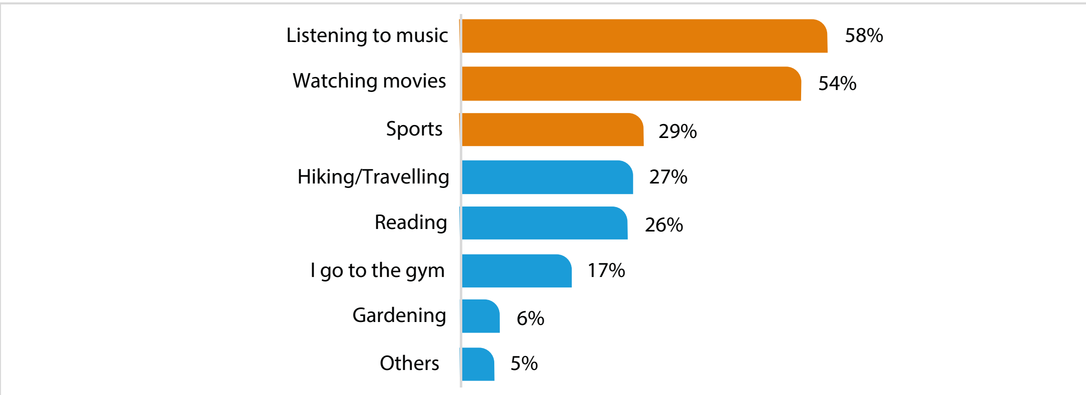



*Figure 11: Recreational Activities Engaged in*

## 3.2. Theme II: Content

This study sought to establish the content that young Kenyans consume (format and tone), motivation for content choices and content type preferences. The findings indicate that the top three types of content that the younger generation in Kenya consume are:

entertainment, celebrity news/gossip and profiles; general current affairs and political news content. The youth prefer content presented in visual/video/pictorial formats and that is interesting, attractive, available, and reliable. Whereas a majority of the youth have never paid for content, those who have, acknowledge that they paid for/are paying for trending news, sports news content, general current affairs, political news content and entertainment.

The findings further indicate that consumption of content by the youth in Kenya is determined by whether it is affordable, interesting, relevant, attractive, and available. The study further established that the subject/headline of the story, peers, close friends/family, and identity of the journalists have an influence on the content millennials and Gen Zs consume. Detailed findings are as presented below.

### 3.2.1. Type of Content Consumed

The findings indicate that slightly more than half of the millennials and Gen Zs reported that they find themselves consuming more of entertainment, celebrity news/gossip and profiles (55%) followed by general current affairs (52%) and political news content (44%). The least consumed content as mentioned by the respondents are dramatic content that present storylines (19%), non-news content/blogs/articles (14%) and E-books (2%) as shown in figure 10 below.

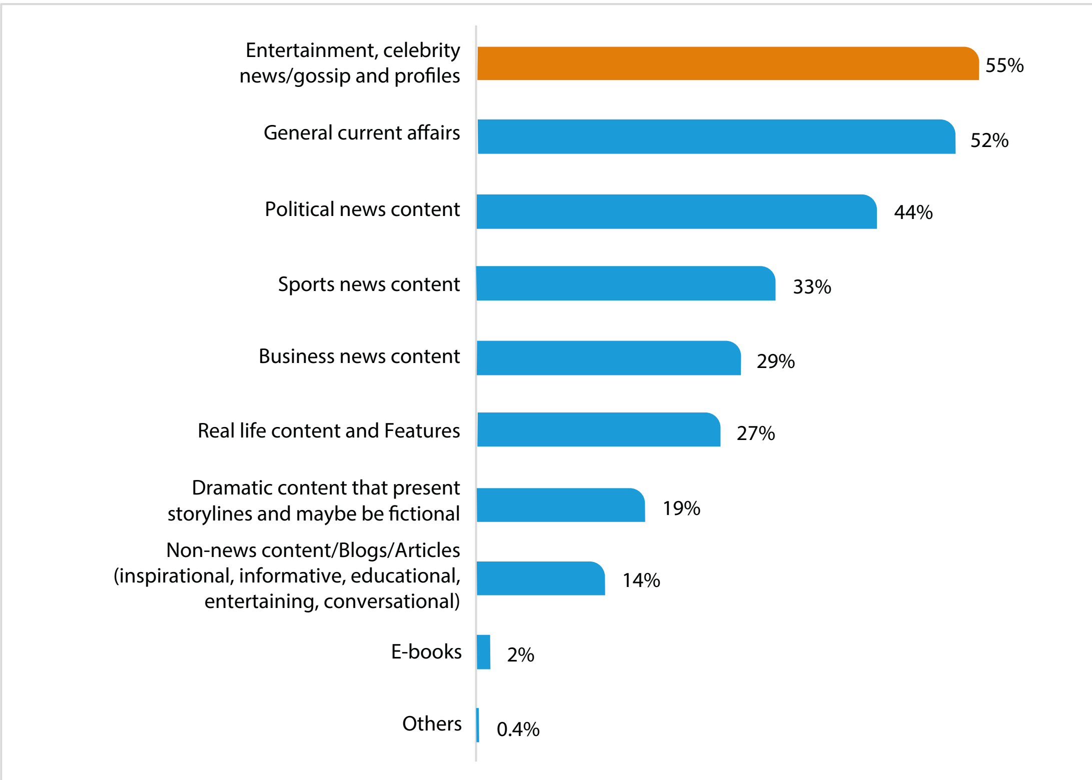



*Figure 12: Type of Content Consumed*

Whereas the findings that millennials and Gen Zs predominantly find themselves consuming entertainment content is expected, the consumption of current affairs and political news is also consistent with studies that have since established that young people pay attention to societal issues such as climate change, unemployment and health care, all which are not only current, but also elicit political conversations. Advances in technology, high smart-phone penetration rates and social media feeds and news alerts have also been found to keep these young people engaged with issues from a variety of sources. The challenge to news media organisations and social media platforms, therefore, is how to leverage on the tradition of production of credible, public interest news by legacy media organisations on the one hand and on the other piggyback on the affordances of social media interactivity to satisfy the news and informational needs of this demographic in a viable fashion.

Findings indicate that more females compared to males prefer content on entertainment, celebrity profiles and gossip (62%), while more males prefer sports news (52%). On the other hand, in terms of age, more Gen Zs preferred entertainment, celebrity news/gossip and profiles (61%) while slightly more millennials preferred current affairs (55%) and political news content (49%) as shown in figure 11 below.

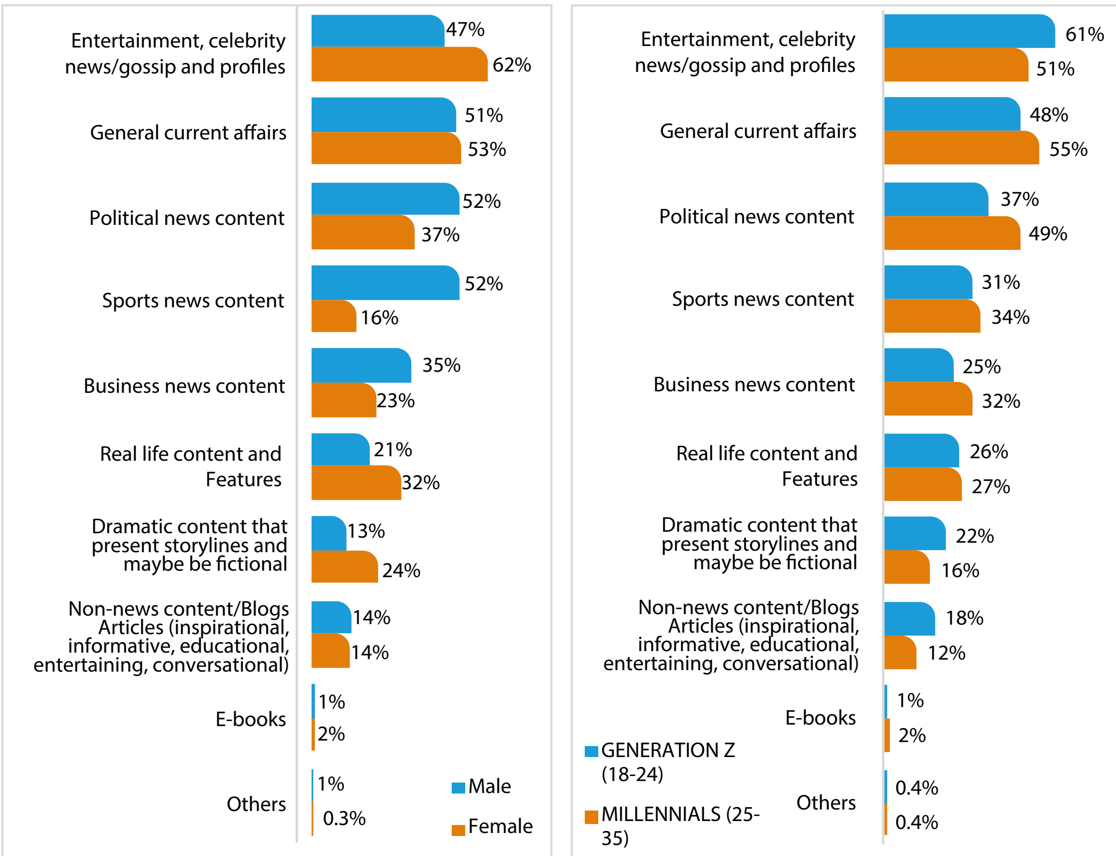



*Figure 13: Type of Content Consumed by Gender and Age*

### 3.2.2. Most Interesting Content

The survey sought to establish which types of content millennials and Gen Zs found most interesting. The findings indicate that interest in content is relatively varied and there seems to be no one dominant content category that these respondents find interesting. Nevertheless 26% of the respondents indicated that entertainment, celebrity news/gossip and profiles is the content that interested them the most, followed by general current affairs (19%), political news content (17%), sports news content (12%) and business news content (9%), as shown in the figure below:

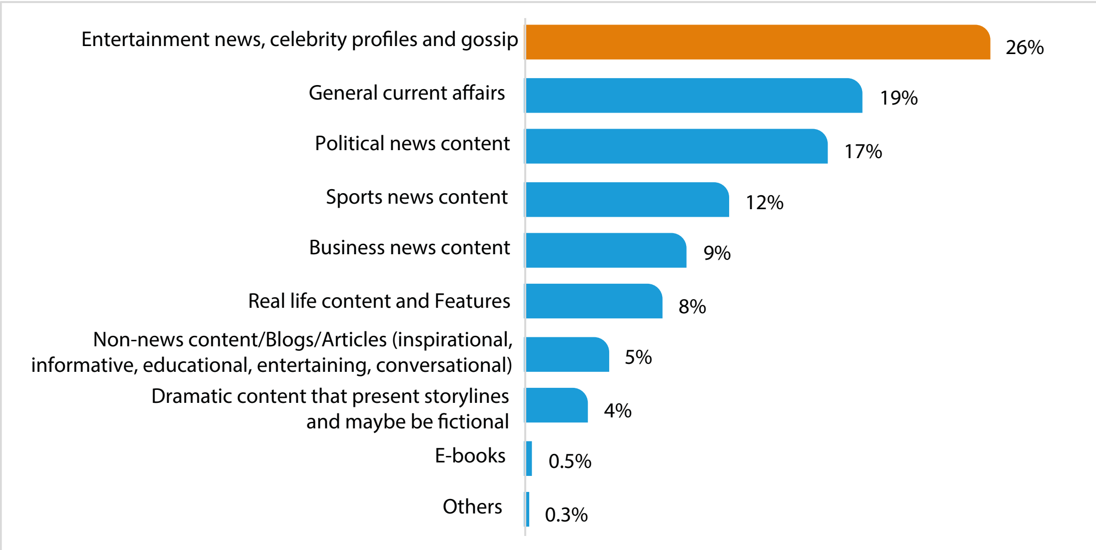



*Figure 14: Most Interesting Content*

### 3.2.3. Preferred Media Format

The top preferred media format mentioned by surveyed youth is visual/video/pictorial format as 84% of the respondents mentioned that they prefer media content in this format. Text is the least preferred format as shown in the figure 13 below.

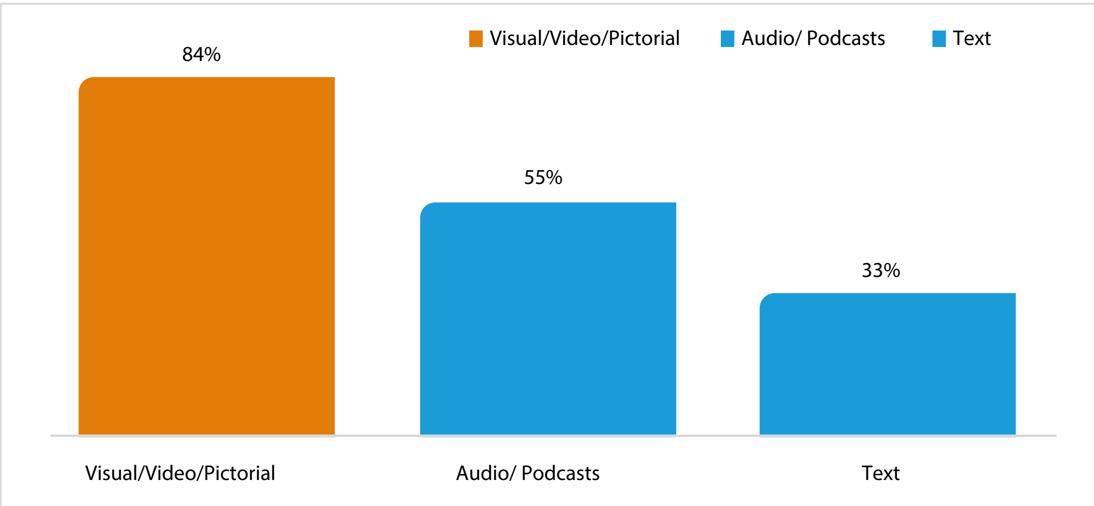



*Figure 15: Preferred Media Format*

Findings from the qualitative data corroborate the preference for content in video and picture formats. It emerged from the discussions that millennials and Gen Zs prefer videos and pictures because they give life to stories, are captivating, emotionally engaging and catchy. The preference for video formats is interesting because, even though true of young people in most countries, video consumption increases the time cost of media consumption and returns control of the consumption process to the producer as opposed to the consumer. The consumer has to watch the video in order to get the information in the order that the producer presents it and on their time frame. Moreover, video production cost and the cost of consuming video content are fairly high.

**...We love something catchy. You'd never pass a page with nice, coloured pictures....**
*FGD Respondent from Kisumu*

**...Youth find it hard to go through articles and want things to be simplified and this can be done with pictures....**
*FGD Respondent, Nairobi*

**...Videos are based on real-time situations....**
*FGD Respondent, Mombasa*

**...it is appealing and very catchy, so they are likelier to click on it, unlike something without pictures....**
*FGD Respondent, Nakuru*

**...I can say videos are more entertaining and is the simplest way to give out information....**
*FGD Respondent, Nairobi*

### 3.2.4. Major Characteristics of Content Consumed

The findings indicate that most of the Gen Zs and millennials do not necessarily rank content characteristics such as brevity, exhaustiveness and elaborateness, adequacy, and progressiveness as important aspects of the content that they consume. They appear to place more weight on characteristics that have less to do with the depth and length of content. The top five characteristics of content millennials and Gen Zs consumed were 1) content that they found interesting (56%), 2) attractive (44%), 3) available and reliable (36%), 4) relevant (36%) and 5) affordable (33%), as shown in figure 14 below. These findings suggest that length of content, whether short or exhaustively long, is not necessarily a big consideration for the choice of content consumed.

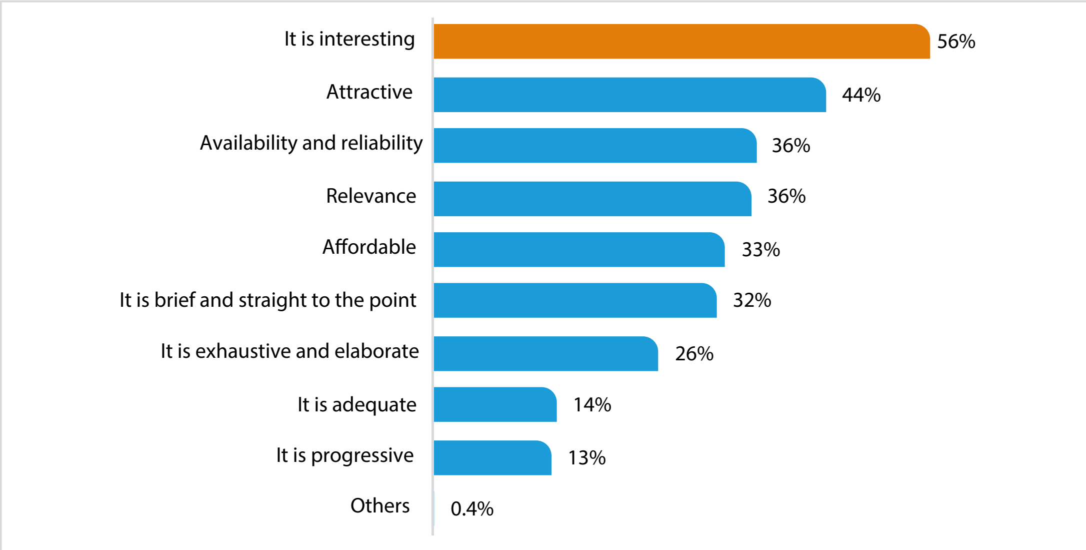
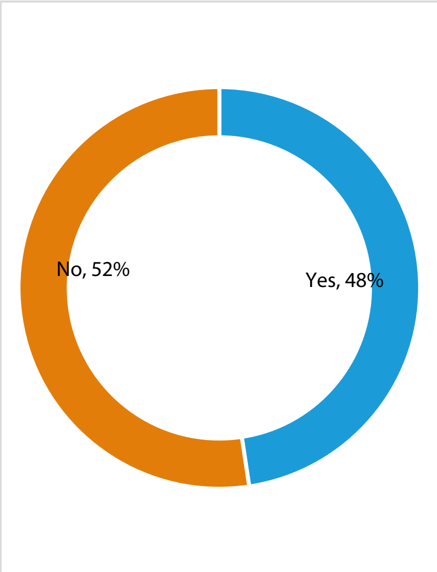



*Figure 16: Major Characteristics of Content Consumed by Millennials and Gen Zs*

Whereas interesting content is conceptualised as content that has something in it for the consumers with aesthetics that are sleek, attractiveness of content goes beyond just the content elements to the wholesome experience of consuming content and the value addition. Attractive content is that content on a tech platform that allows the user to enjoy some added values such as interactivity and co-creation. It also affords the consumer potential for usage[viii] and from a content perspective it does have some element of enjoyment and progress. The findings on the major characteristics of content therefore seem to suggest that are more inclined to consume content that engages them by allowing them to be part of the content co-creation and content that appears to be easy to use within the context of progress and enjoyment.

### 3.2.5. Paid Content

More than half (52%) of the surveyed youth (n=1200) reported that they have never paid for media content, while 48% indicated that they had. Slightly more than a third of the millennials and Gen Zs who reported paying for content (572) mentioned that they have paid for trending news (35%), sports news content (34%) and general current affairs (32%) types of content. Further, 30% have paid for political news content and 29% for entertainment content. The table below provides a summary.



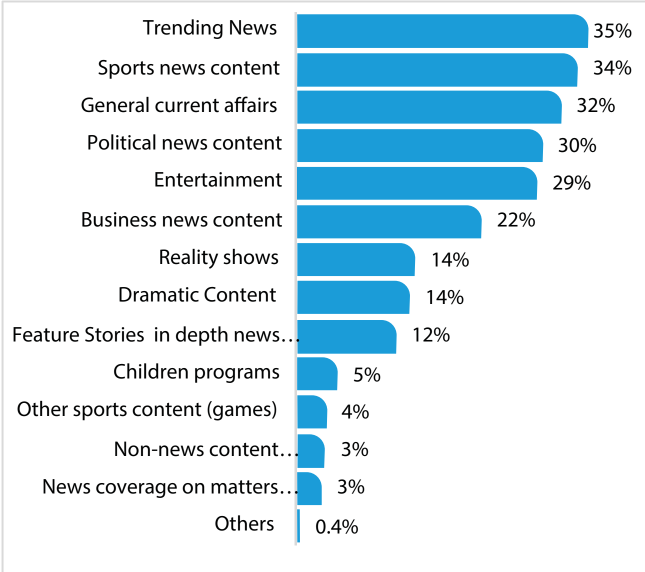




*Figure 17: Paid for Content*

In terms of region, the highest proportions of youth who pay for content come from Eastern (72%), Western (65%) and Nairobi (54%), while Rift Valley (66%) and Central (62%) have the highest number of respondents who indicated that they have never paid for content as shown on the figure 22 below.

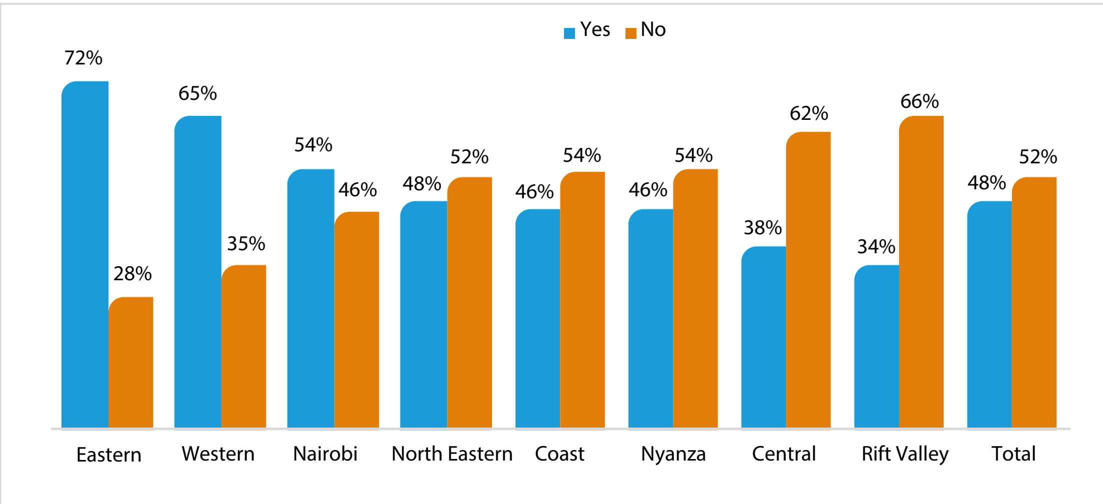



*Figure 18: Paid for Content by Region*

In terms of gender, there is effectively no difference in the numbers that have ever paid for media content. On the other hand, more millennials (50 per cent) than Gen Zs (44 per cent) have ever paid for content they consume.

### 3.2.6. History of Payment for Content

Reuters Institute of Journalism's 2019 Digital News Report established that many publishers have been increasing their efforts to get audiences to pay for content, noting that Kenyan publishers just like others in different countries have recently launched or consolidated paywalls [ix]. The findings in the current study seem to reflect these efforts as half of the respondents (50%) indicated that they only started paying for content within the last 12 months. The other half (50%) of the surveyed respondents have been paying for more than a year. Some 27% have been paying for one to three years, 14% have been paying for three to five years and 10% for more than five years. Those who have paid for less than three months accounted for 21% of the surveyed youth as shown in figure 17 below.

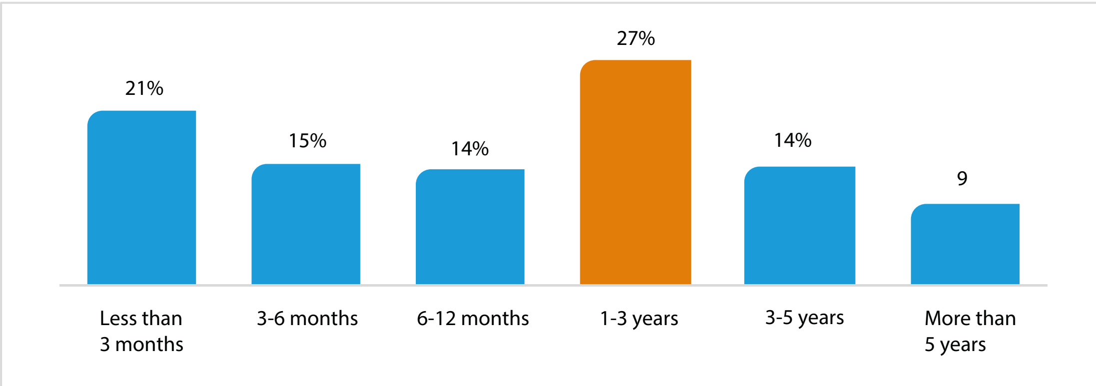



*Figure 19: How Long have you been Paying for the Content?*

In terms of age, the survey established more millennials (56%) than Gen Zs (41%) have been paying for content for more than a year. In terms of gender, the survey established that equal number of males (51%) and females (51%) have paid for content for more than a year. The findings seem to suggest an encouraging trend of recent subscribers to different pay-package models as 50% of the respondents started paying for content in the last one year, with 21% having started paying in the last three months. Whereas previous studies on young people and their consumptions habits have concluded that news media organisations need to tell stories in ways that fit the expectations of young people, including the use of native formats for mobile phones and social media platforms,[i] the findings in the current study suggest that payment models also need to be tailored to the expectations and income levels of millennials and digital natives. Content strategies by news media organisations need to go beyond the established monthly subscriptions and offer what previous studies have termed as the best opportunity for payment of content that offers both progress and fun.[i]

### 3.2.7. Payment Amount

Studies have shown that millennials and Gen Zs do not really have a positive attitude towards payment for news. However, Galan et. al (2019) note there are some key instances when young people might be willing to pay for news.[i] First, is when they identify with a brand and have a personal closeness with the brand and what the brand stands for, often because of the brand's journalistic rigour and style. Second, young people would be willing to pay for content if that content is unique and provides them with what they need to learn and progress in their careers. Thirdly, young people are likely to pay for unique content that is of personal interest and relevant to their pursuit of specialist knowledge that they cannot get anywhere else. Any news brand that offers this kind of content would definitely have young people pay for such content. Lastly, millennials and Gen Zs would be willing to pay for content if their parents were the ones making the payment for them. However, not many studies in East Africa have gone deeper to establish how much young people are paying or would be willing to pay for content. The current study established that almost half (46%) of the surveyed Gen Zs and millennials stated that they pay between KES 11 and 50, excluding platform fees, per day to access content. Some 3% do not pay anything while 13% pay more than KES 100. Detailed findings are as presented in figure 18 below.

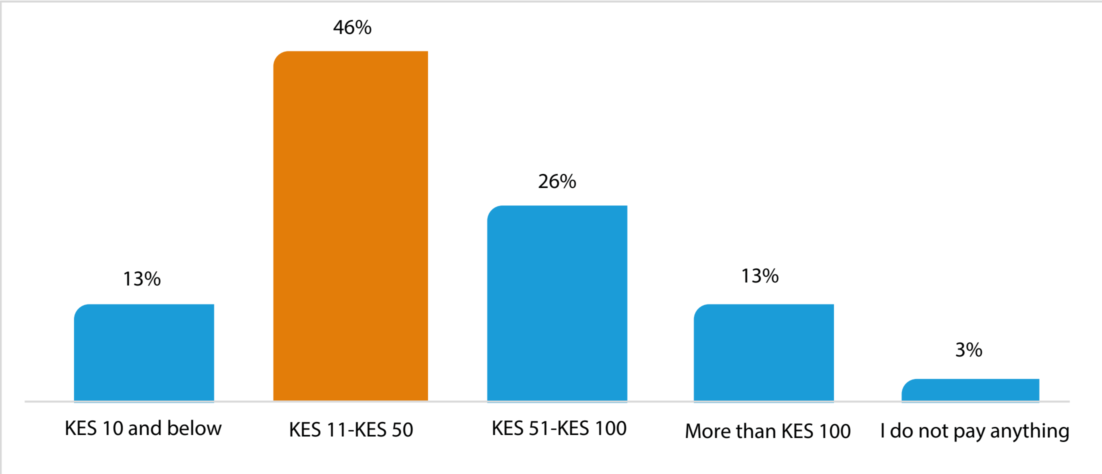



*Figure 20: How Much do you Currently Pay per Day Excluding Platform Fees, for Content that is of Interest to you?*

A significant percentage of 572 respondents (72%) who pay for content pay between KES 11 and 100 per day, which seems to suggest the existence of a wider lucrative target audience if the media can get more consumers willing to pay this range of amount per day. These findings further suggest that with tailored targeting and carving of different niches, the media can succeed in increasing the number of paying consumers. The large number of millennials and Gen Zs to be tapped is further underscored by sentiments from the qualitative phase from where participants were near unanimous that they would be willing to pay for content that caters for their need to learn and progress. That is consistent with earlier studies that have since established that young people would have a higher proclivity to pay for unique content they need to learn and progress[i] . Further, the findings from the interviews seem to indicate that most of the millennials and Gen Zs who are already paying for content would be willing to pay KES 10 a day to access news content they desire from the news websites. However, entertainment content, especially foreign content does not seem to attract cost concerns, as most of the youths noted that they would be willing to pay between KES 500 and KES 1,450 to access entertainment content from streaming services such as Netflix and Showmax.

**...I would not be willing because I buy bundles, but if the content is relevant and interesting with value, I can pay ....**
*FGD Respondent, Nakuru male*

**...Yes, I pay but for what helps me like for my business; I pay to boost my page and to access more clients and so far, I get value for my money, and if I think I don't get value I to have to inquire with those who manage the platform....**
*FGD Respondent, Mombasa*

**...For business, I pay to boost items I sell, currently it's a bit higher than before but I get value for my money, others I don't pay....**
*FGD Respondent, Mombasa*

**...Some media content I do pay for....**
*FGD Respondent, Nairobi female*

**...I did pay for show max, and it was good I did pay 250/=....**
*FGD Respondent, Nakuru female*

### 3.2.8. Motivations to Subscribe or Pay for Content Consumed

Most Uses and Gratification studies have focused on the audience's motivation for consuming media content. Earlier scholarship in Uses and Gratifications identified four typologies of surveillance, diversion, personal identity, and personal relationship.v Surveillance refers to the motivation to be informed about things that affect people and the society, diversion speaks to emotional release and escape from daily routines, personal identity refers to the motivation for a consumer's self-understanding and reinforcement of values, while personal relationship refers to motivation to consume the media for purposes of social integration[x]. Subsequent scholarship has expanded the dimensions for motivations to consume media to these nine: relaxation, companionship, habit, passing time, entertainment, social interaction, information/surveillance, arousal, and escape.[xi] However, in as much as subsequent studies in Uses and Gratifications and the attendant motivations for consuming media content including news have developed the theory further and focused on niche consumption areas, the digital disruption seems to have led to the emergence of discourse on what motivates consumers to pay for media content. The current study sought to determine the factors that motivate millennials and Gen Zs to subscribe or pay for media content. The findings indicate that the top five factors that motivate millennials and Gen Zs to subscribe or pay for news media content are affordability (50%) whether it is interesting (48%), relevance (40%), attractiveness (37%) and availability/reliability (34%) as shown in figure 19 below.

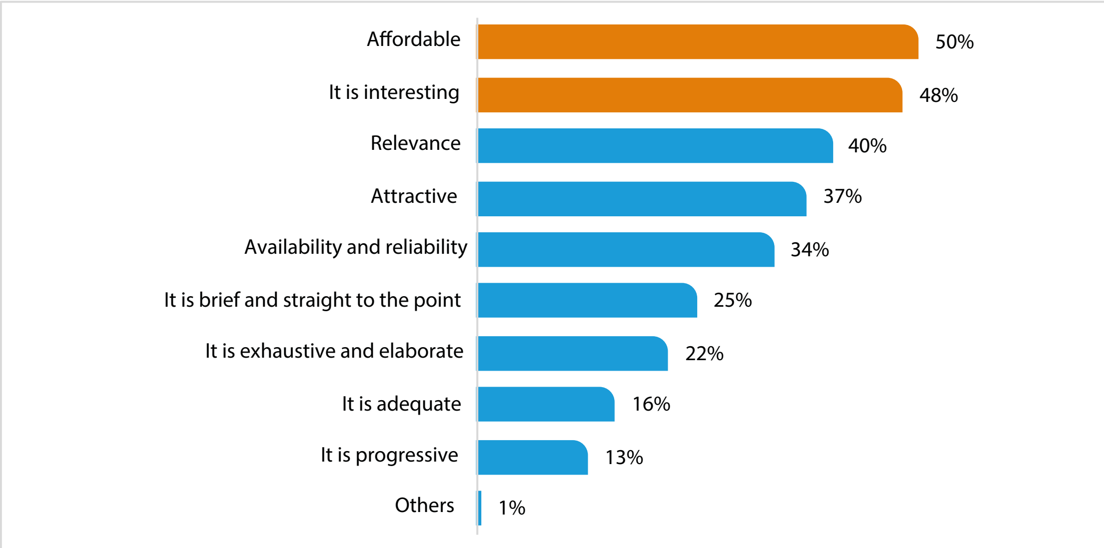



*Figure 21: Factors millennials and Gen Zs Consider when Subscribing or Paying to Receive /Access News Media Content.*

The findings above, especially affordability and availability/reliability as factors that motivate millennials and Gen Zs to pay for content are consistent with previous findings on provocations around payments[i] . Young people, as they found out, want content they can easily access with reduced friction (pay per article), are cheaper per person, and offer shared flexibility (shared accounts), affords them the opportunity to access multiple news and media content (brand bundles) and have payment methods that are easier to make.[i] There is certainly nothing new in these findings, but they certainly buttress the fact that journalist and media managers who want to succeed need to improve their focus on customer service, customer relations and customer convenience and do a better job of returning value for cost. The question of bundled content offer speaks to packaging of relevant content for this demographic that wants more per money spent and the onus is on media houses to bundle the best package of more that is economically viable. Critical also in these findings is the economic question of transaction costs (convenience and speed) associated with consuming content from the media houses, combined with the time cost of consumption.

### 3.2.9. Factors that Influence the Choice of Media Consumed

The millennials and Gen Zs are predominantly influenced in their consumption of different media content by the subject or headline of published stories (48%); peers, especially on social networking sites (44%); and close friends and family (40%). The other factors mentioned as influential in their content choices include the journalists who have written the stories (32%) and the reputation of the entity/media house/company airing the story (27%).

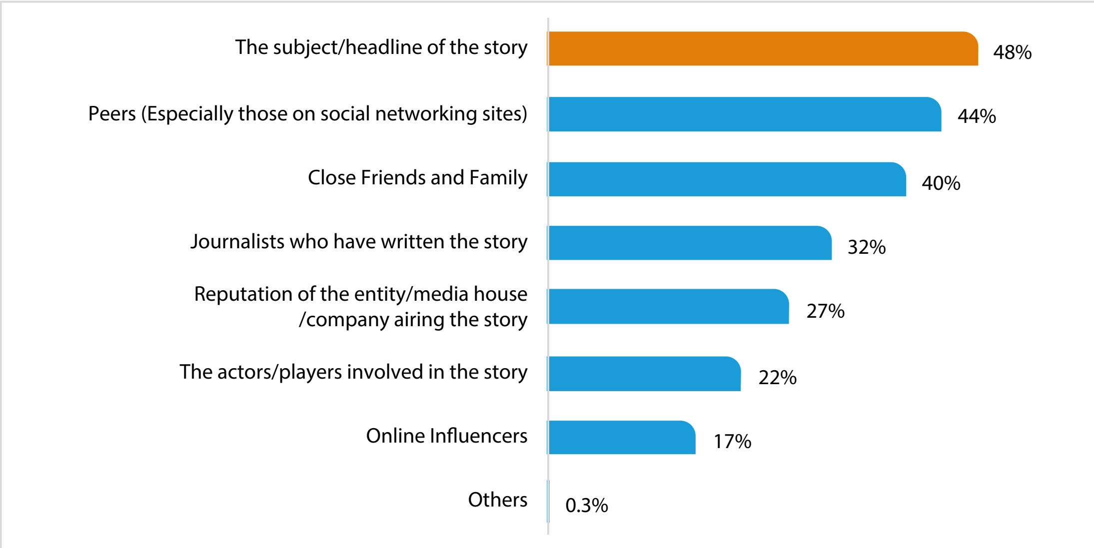



*Figure 22: Factors that Influence the Choice of Media Content Consumed*

The top two mentioned factors, appear to be clickbait-leaning factors, but earlier studies have since established that the youths get disappointed with clickbait headlines and tend to shun brands that thrive on clickbait content and the attendant numbers. However, the consideration of the journalists who have written the stories and reputation of the media houses/company airing the story speak to news media organisations' brand reputations and credibility as a key factor in the choice of content millennials and Gen Zs consume.

### 3.2.10. Content Young People Would Like to Consume on Legacy Media

Young media consumers continuously seek media content that gratifies their needs for progress and enjoyment.[i] However, there also seems to be a disconnect between the younger consumers of news media and the traditional news media that is increasingly less relevant and dominant as news content suppliers to these young consumers.[i] It is therefore important for legacy media and other publishers of news and information content to understand that for the millennials and digital natives, news and media content is not just about what they should know, "but also what is useful to know, what is interesting to know, and what is fun to know,"[i] which speaks to the duality of progress and enjoyment.

The current study sought to understand the type of content the millennials and Gen Zs in Kenya would like to consume as a pathway for embedding in this content what is useful, interesting and fun. The findings indicate that the top five contents mentioned by the youths as their preferred content on traditional/legacy media platforms such as television, radio and newspapers are: news (60%), movies (45%), sports (40%), documentaries (35%) and telenovelas/soaps (29%). Other contents that the youths prefer are as shown in figure 21 below.

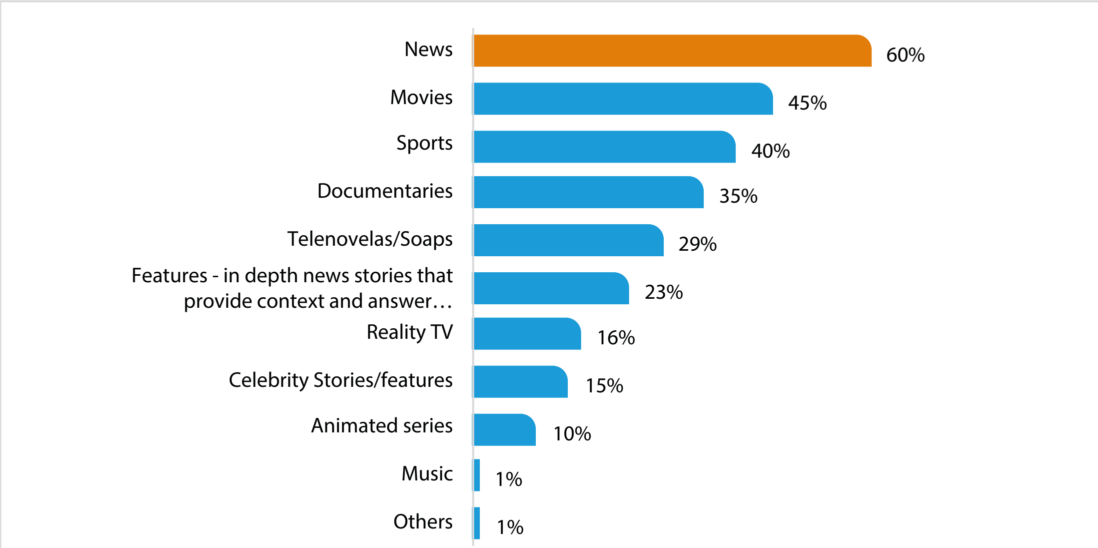



*Figure 23: Content Young People Would like to Consume on Legacy Media*

Findings from the qualitative phase indicate that the youth would desire traditional media content to focus on areas such as empowerment, entertainment, employment opportunities, business-related topics, sports, lifestyle and reality youth-related shows. An analysis of both the quantitative data and qualitative responses seem to suggest that legacy media houses need to make their news more useful to the younger demographic by not only informing them, but also empowering them, addressing issues of employment, lifestyle and entertainment in a fashion that has both progress and enjoyment. The millennials and Gen Zs further noted that the media should not focus too much on political content.

**...Employment and life skills. We need to know how to handle issues without fear....**
*FGD Respondent, Kisumu*

**...I think they should give job ideas and support us financially....**
*FGD Respondent, Nakuru*

**...To focus on spirituality, parenting, politics, cooking and in church matters....**
*FGD Respondents, Nairobi*

## 3.3. Theme III: Description Of Media Consumption Habits And Behaviour

Media brands' understanding of consumer behaviour is critical for anchoring informed decisions about their products and services. By understanding why people associate with certain brands and how they use them, brands can adapt their offerings to better suit the needs of their target markets. The survey sought to analyse the media consumption habits and behaviour of young Kenyans by first finding out how these millennials and Gen Zs describe themselves with respect to media consumption.

A third (33%) of the surveyed millennials and Gen Zs describe themselves as subscribers to most of the social media platforms, 22% as consumers who enjoy watching TV, while not many describe themselves as avid listeners of radio (7%) or readers of newspapers, books and magazines (3%). The findings show that a critical number (19%) of the millennials and Gen Zs describe themselves as always, the first in their groups to interact with new information or get information on current affairs.

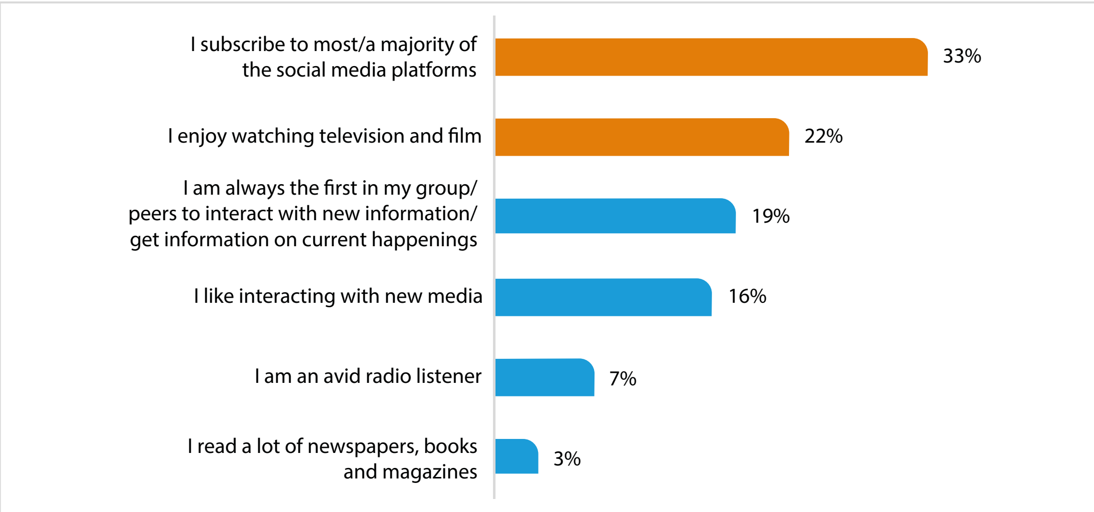



*Figure 24: Millennials and Gen Zs Description of their Media Consumption Habits and Behaviours*

Studies have shown that when media consumers get sufficient rewards from the media brands, they form positive attitudes, develop favourable subjective norms and contribute to favourable use intentions.[xii] To this end, media houses and media brands can build on the 19% of the consumers who want to get information on current happenings to leverage peer-influencers. Studies on herd behaviours among consumers have found that lead herds provide cues that influence behaviour adoption and shortcuts to decision making for consumers who are bombarded with an avalanche of information.[xiii] Therefore, the lead herds among millennials and Gen Zs who want to be at the cutting edge of what is happening can act as a shortcut to decisions and peer influencers of what brands to consume. That would call for the media to leverage on the peers, who have been found in this study to be influential in the media that the youths consume to lead more consumers to their brands. The onus is thus on the media to endeavour to reward these lead herds with cutting edge information and build on the favourable attitudes they form to lead more consumers to their brands. But this can only work if media brands endeavour to meet these peer influencers' needs of progress and enjoyment with information that is current and puts them at the cutting edge of information in the eyes of their peers.

## 3.4 Theme IV: Platforms Relied On For Media Content

The millennials and Gen Zs in Kenya rely on various platforms for general information. Their main sources of information are social media, television and radio. For social media, the main platforms relied on are Facebook, WhatsApp, YouTube, Twitter and Instagram, whereas Citizen TV and NTV stand out as the top TV brands. The main factors that attract the youth to offline TV brands for news are their capacity to offer credible, reliable, educative and entertaining content. The offline TV brands were also found to provide updates on current affairs and have competent and professional journalists. To improve their brands, the respondents indicated that TV stations need to focus on youth empowerment and educative content. They should also provide content on entertainment and job opportunities. However, they should reduce the number of advertisements that interrupt normal programming. The study also established that millennials and Gen Zs depend on specific platforms for specific media needs such as politics/governance, current affairs, job opportunities, entertainment, and personal development. The survey found that mobile phones are the most used devices or platform for consuming information. Other devices that are relied on by a significant proportion of youth include TVs and radios. The detailed findings are presented below.

### 3.4.1 Media Platforms Relied on for General Information

TV is the top platform relied on for general information, with 76% of the millennials and Gen Zs indicating that they rely on TV stations for general information, followed by social media (74%) and radio stations (55%). Newspapers (19%), websites of the news media organisations (18%) and digital native media houses are not popularly relied on by the millennials and Gen Zs though the findings indicate that they are relied on by a fairly significant number as shown in figure 23 below.

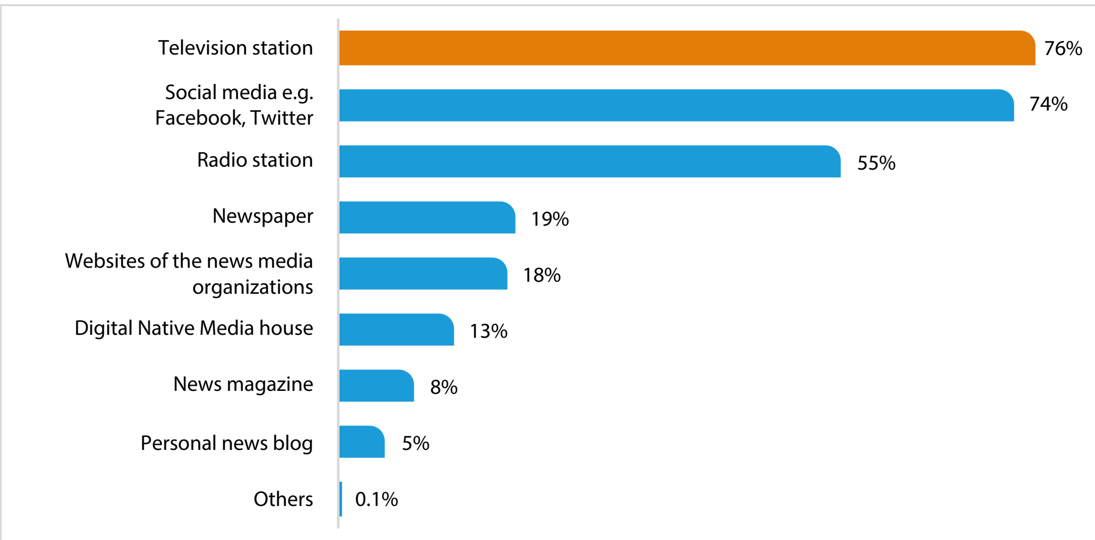



*Figure 25: Media Platforms Relied on for General Information.*

The findings from the qualitative phase further corroborate quantitative findings as it also emerged from the participants responses that social media is their main source of information. Besides general information, the participants were near unanimous that social media provides them with entertainment, news, gossip and allows for interaction with friends and family, something that legacy media does not afford them. However, the participants in the FGD also noted that the feeling among the millennials and Gen Zs is that legacy media platforms are outdated and barely allow for flexibility. Below is what some of them had to say regarding the platforms that they rely on for information.

**...I think social media platforms are easy to access, and every youth has a mobile phone which makes it easy for them to use social media because it is not expensive...**
*FGD Respondent, Nairobi*

**...Social media is convenient...**
*FGD Respondent, Nakuru*

**...news channels like newspapers are getting outdated because you must go out to buy them....**
*FGD Respondents, Kisumu*

**...As for me the internet is the easiest way to reach a lot of people. So, it is catchy for young people...**
*FGD Respondent, Nairobi*

**...I think they prefer it [social media] because it is not boring like newspapers....**
*FGD Respondent, Nairobi*

**...Social media has become an easier platform to research, to Google and find anything....**
*FGD Respondent, Mombasa*

### 3.4.2 Social Media Platforms Used

The top five social media platforms that the millennials and Gen Zs reported using and depending on for news are Facebook (84%), WhatsApp (74%), YouTube (56%), Twitter (47%) and Instagram (40%). The research also adopted digital tracking as a method of collecting data on the consumption habits and social media platforms used by millennials and digital natives, especially on the manifest habits that respondents cannot self-report. A sample of 150 millennials from Nairobi, Mombasa, Kisumu and Nakuru was selected as explained earlier in this report and their digital footprints and consumption habits tracked and monitored. The findings from the digital tracking are in line with the findings from the survey save for YouTube, which the survey shows is among the top five most used platform but is not among the top five based on the tracking. The digital tracking, unlike the survey findings, further shows that WhatsApp is the most used platform and Instagram and Twitter are used and consumed much more than what the respondents in the survey reported. In a nutshell, the findings indicate that whereas, the top five from the self-report questionnaire are Facebook, WhatsApp, YouTube, Twitter and Instagram, the tracking indicates that WhatsApp is consumed more, followed by Facebook, Instagram, Twitter and TikTok as shown below.

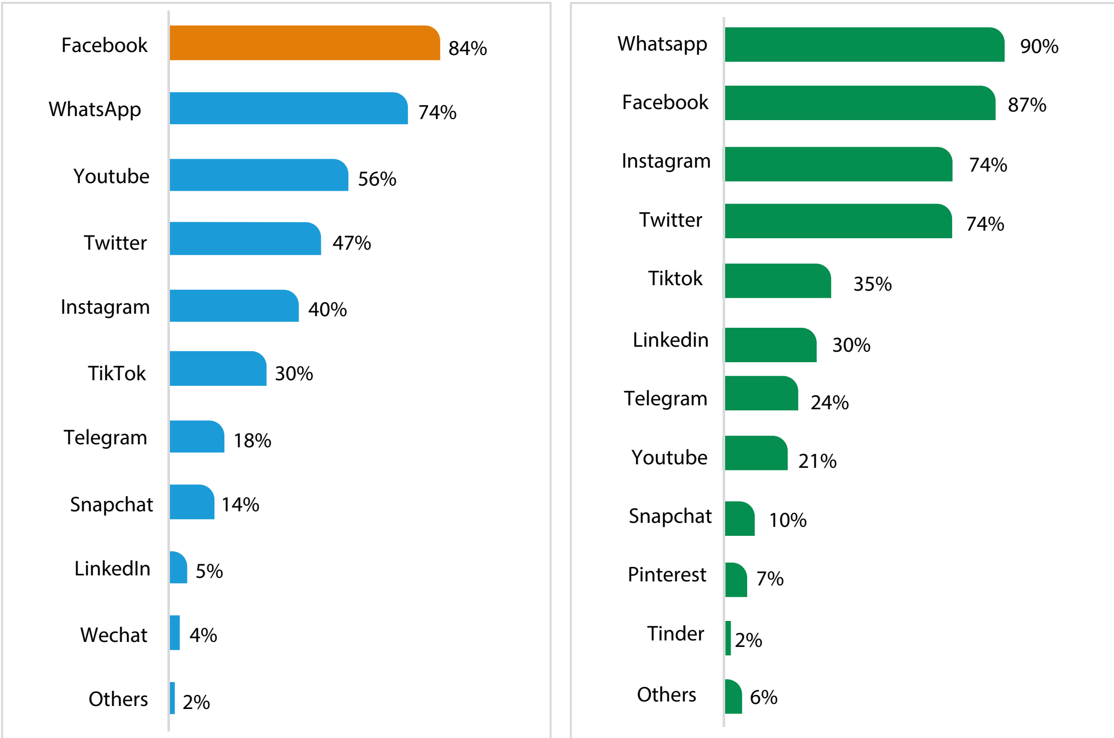



*Figure 26:Top Social Media Platforms Used Based on the Survey and the Digital Tracking.*

The millennials and Gen Zs in the FGDs explained the reasons why these platforms are the most used and depended on. Key among the reasons is accessibility and availability, a situation that they noted has been enhanced by increased ownership of smart phones and affordable internet. Other reasons include the manner in which the news is delivered as snippets and with infographics, the ability to get the news and updates fast on platforms such as WhatsApp, variety of perspectives, interactivity and feedback. These responses suggest that for these millennials and Gen Zs, news and content consumption on interactive platforms that allows other consumers to chime in with different relatable perspectives is important to them because such contributions by peers provide context they can relate with and robustly engage. Below are some of what they had to say.

**...WhatsApp and Twitter because there are groups that update us on what's happening and members respond and sometimes comment or even give more information on news posted....**
*FGD respondent, Nakuru*

**...social media is the most available medium of communication. If you post something on social media and I am not comfortable with it, then it is easy for me to give feedback...**
*FGD Respondent, Nairobi*

**...social media is more cost-effective than mass media. For example, it is easier for me to read something online than to go buy a newspaper. Also, on social media you can get different views of a story unlike the mass media where the story is one. Again it is very effective and easily available...**
*FGD Respondent, Nairobi*

**...So, if you don't use social media, you will have information only about your area, which is not good because sometimes there might be something trending but you don't have any idea about it...**
*FGD Respondent, Mombasa*

**... It is so because most of the youth have smartphones thus accessibility is easy.....**
*FGD Respondent, Kisumu*

**...I think it brings the easier connection between people who are far, it has video calls, voice notes, and notes. So, it is easier to use and connect....**
*FGD Respondent, Kisumu*

**...The youth prefer it because it is the simplest way and the easiest way to reach millions of people...**
*FGD Respondent, Mombasa*

Though it emerged from the FGD that there is interest to actively use TikTok and YouTube, and the self-reporting survey also ranked YouTube highly as a platform, the digital tracking findings indicate that only 35% and 21% tracked millennials and digital natives, respectively, were actively using these two platforms. These two platforms are data heavy as the content is packaged mostly in video format. This explains why they are not used as regularly as top tier platforms like WhatsApp, Facebook and Twitter, which have minimised the cost of obtaining the information since the content is presented mostly in text and pictorial format. It is important to note that the tracked data and the data from the self-reporting survey contradict as the survey indicates a higher preference for video and pictorial formats while the tracking, even though with a smaller sample size, suggest that in practice time cost of consumption is an issue for Kenyan youths. The cost implications of video formats and consumption of content on YouTube might be limiting the consumption of what these millennials and Gen Zs prefer in terms of format.

LinkedIn and Telegram are mainly used to access job opportunities, career development and creating connections. The high levels of unemployment and underemployment explain the drive among the youth to use these platforms -- especially LinkedIn -- to tap into employment opportunities.

### 3.4.3 TV Brands Consumed by the Millennials and Generation Zs

The study also sought to analyse the top TV brands consumed by the millennials and Gen Zs in Kenya. The respondents were asked to mention the top TV stations relied on for news offline. The top five TV brands mentioned by majority of the respondents are Citizen TV (72%) as the offline TV station they rely on for news followed by NTV (36%), K24 (31%), KTN News (23%) and KTN Home (14%). Figure 29 below presents all the TV brands and the percentage mentions by the millennials and the Gen Zs as the brands they rely on for news offline.

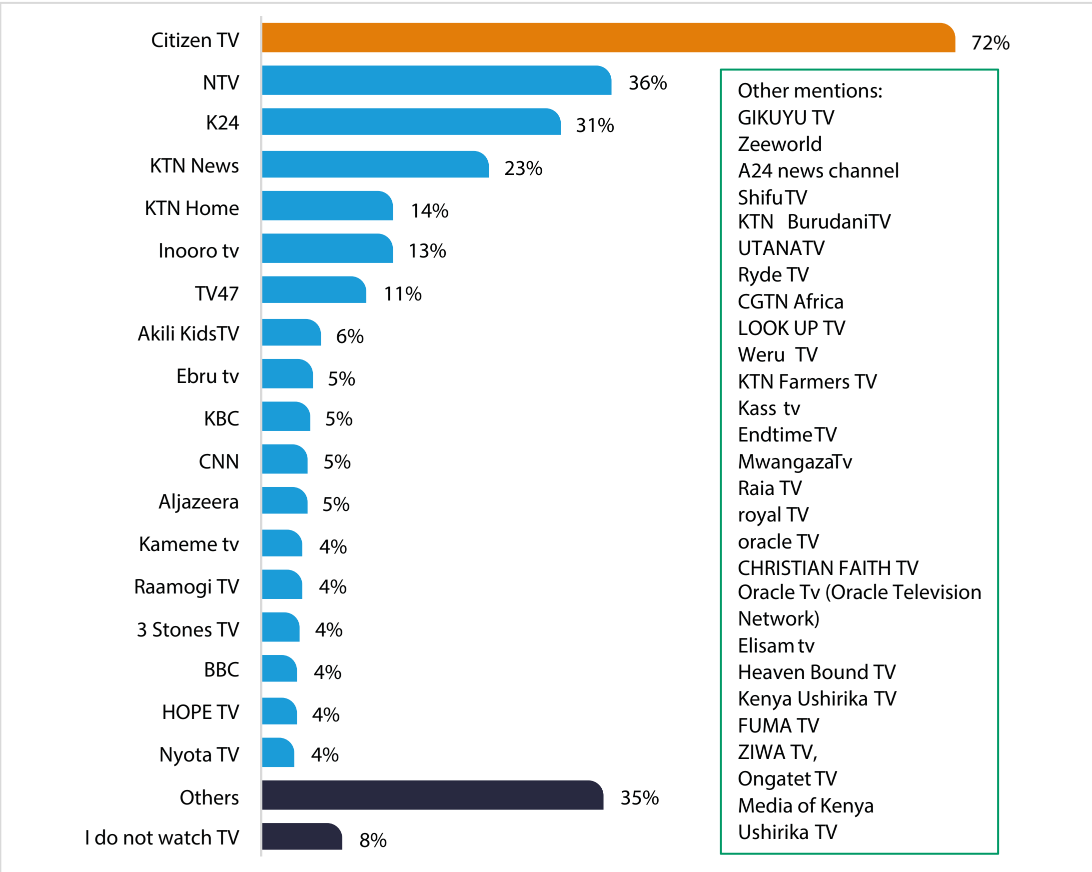



*Figure 27: TV Brands Consumed and Relied on for News Offline*

Across all the regions, Citizen TV emerged as the top brand that the youth watch for news offline. The gulf between Citizen TV and the other TV brands is fairly big, though in Central (54%), Rift Valley (42%) and Western (42%) the findings indicate that NTV has narrowed the gap between it and Citizen TV. The consumption of NTV in these three regions stood out more as compared to those from the other regions. Further, the youth from Rift Valley (35%) and Western (34%), mentioned that they access K24 for news offline, which is relatively higher than the national percentage of K24 TV.

*Table 7: TV Brands Consumed and Relied on for News Offline by Region*

| | Geographical regions | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | Coast | North Eastern | Eastern | Central | Rift Valley | Western | Nyanza | Nairobi | Total |
| Citizen TV | 70% | 58% | 63% | 74% | 70% | 81% | 73% | 74% | 72% |
| NTV | 29% | 20% | 26% | 54% | 42% | 42% | 35% | 31% | 36% |
| K24 | 28% | 27% | 32% | 30% | 35% | 34% | 27% | 30% | 31% |
| KTN News | 23% | 24% | 28% | 22% | 20% | 22% | 33% | 23% | 23% |
| KTN Home | 21% | 2% | 9% | 15% | 16% | 2% | 1% | 15% | 14% |
| Inooro tv | 2% | 1% | 14% | 36% | 7% | 3% | 1% | 17% | 13% |
| TV47 | 9% | 8% | 12% | 12% | 12% | 4% | 15% | 11% | 11% |
| Akili KidsTV | 3% | 5% | 2% | 6% | 7% | - | 4% | 9% | 6% |
| Ebru TV | 2% | - | - | 5% | 3% | 4% | 4% | 10% | 5% |
| KBC | 12% | 3% | 6% | 4% | 3% | 5% | 2% | 4% | 5% |
| CNN | 3% | 5% | 3% | 2% | 6% | 1% | 6% | 7% | 5% |
| Aljazeera | 1% | 7% | 5% | 9% | 7% | 3% | 2% | 3% | 5% |
| Kameme TV | 1% | - | 5% | 15% | 2% | - | - | 4% | 4% |
| Raamogi TV | 4% | - | - | 3% | 3% | 5% | 30% | 2% | 4% |
| 3 Stones TV | 1% | - | - | 1% | 5% | 1% | - | 8% | 4% |
| BBC | 4% | 5% | 1% | 2% | 6% | 2% | 5% | 4% | 4% |
| HOPE TV | 4% | - | - | 2% | 3% | 2% | 2% | 7% | 4% |
| Nyota TV | 3% | 8% | - | - | 3% | 26% | 13% | 1% | 4% |
| Others | 34% | 13% | 8% | 25% | 45% | 32% | 24% | 46% | 35% |
| I do not watch TV | 13% | 20% | 21% | 7% | 7% | 3% | 11% | 4% | 8% |

### 3.4.4 Elements that Attract the Millennials and Generation Zs to Offline TV Brands and their News

The findings as presented above show that TV pips social media as the most relied on platform for general information. However, the study also established that millennials and Gen Zs are discriminate in their choice of TV brand. The findings indicate that credible and reliable news content (52%), educative and entertaining content (47%), updates on current affairs (40%), competent and professional journalists (37%) and TV's offerings of news content that is simple and easy to understand (33%) are the top five elements that attract these millennials and Gen Zs to the specific choice of TV brands. It is significant to note that the findings indicate that free viewership of content was only mentioned by 10% of the respondents as an element that attracts millennials to TV brands.

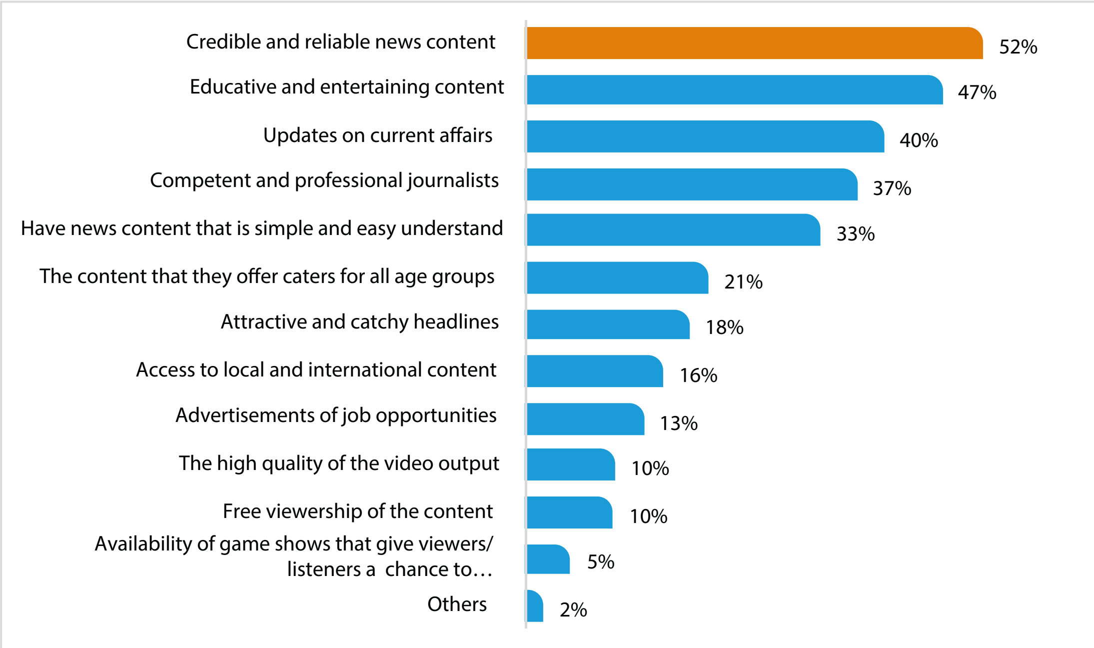



*Figure 28: Elements that Attract Millennials and Digital Native s to TV Brands and their News*

## 3.4.5 What TV Brands Need to Work on to Attract Millennials and Gen Zs

The study established that about a third (29%) of the surveyed respondents would want TV brands to work on content that focuses on youth empowerment and education. Other key areas that surveyed millennials and Gen Zs mentioned as important areas of focus that TV brands should work on to attract the youths are airing of entertaining content like trending topics (20%), advertisement of job opportunities (9%) and reducing the number of advertisements interrupting normal programming (9%). These findings suggest that opinions on what TV brands should do are varied and there seems to be no single area that a third or more of the respondents agreed on in their mentions of what TV brands need to address to attract more millennials and Gen Zs.

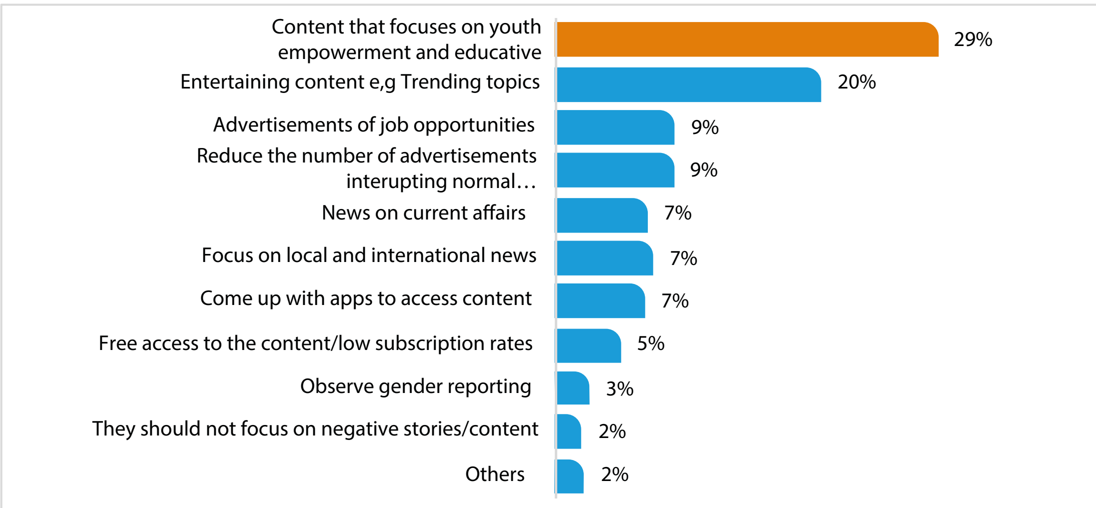



*Figure 29: Areas that TV Brands Should Focus on to Attract the Youth*

### 3.4.6 Radio Brands Consumed by the Millennials and Gen Zs

The findings as presented in the previous sections indicate that after TV and social media, radio came third as the most preferred platform for consumption of general information. The findings further indicate that the top five radio brands relied on most by millennials and Gen Zs for news offline are Radio Citizen (24%), Classic FM (17%), Kiss (15%), NRG Radio (13%) and Hot FM (13%). Details of the radio brands that the youth rely on to access news offline are presented in the figure 28 below.

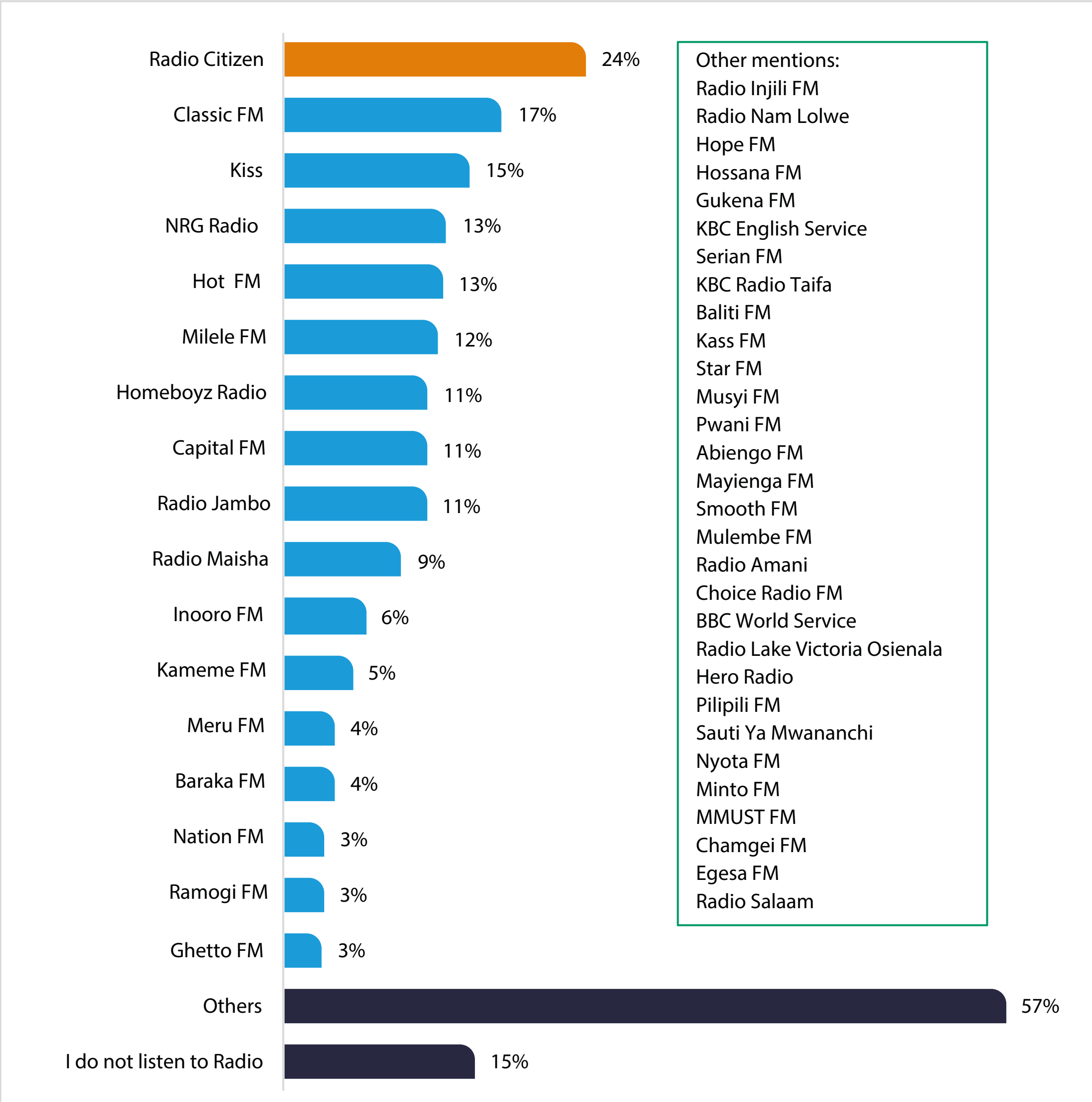



*Figure 30: Radio Brands Consumed and Relied on for News Offline*

It is important to note that other than Radio Citizen, the other top five radio stations relied upon by millennials and Gen Zs are not among the top radio stations nationally. The Media Council of Kenya (MCK, 2022) State of the Media Report, for instance has Citizen radio (18%), Radio Jambo (16%), Radio Maisha (12%), Milele FM (8%) and Inooro FM, Kameme FM and Radio Taifa all on 4% listenership.[xiv] The current study's findings when juxtaposed with MCK's data that focuses on the broader national audience demographic suggest that Classic FM, Kiss FM, NRG Radio and Hot FM may not have higher listenership among the generic national audience, but are fairly popular with the millennials and Gen Zs.

The findings also indicate that the number of respondents who mentioned that they do not listen to radio (15%) is almost double the number that mentioned they do not watch TV (8%). These findings further underscore the millennials and Gen Zs waning consumption of radio. However, compared to TV the findings on radio brands consumption seem to suggest that radio listenership is less concentrated in a few brands like TV. The listenership gap between the top radio as mentioned by the respondents and other radio brands, and even the perceived audience share of these radio brands based on the findings, suggest that radio is a lot more specialised and targeted at niche consumers, a situation that makes it difficult to have one radio station that is overly dominant.

### 3.4.7 Elements that Attract the Millennials and Gen Zs to Offline Radio Brands and their News

The top five mentioned elements that attract millennials and Gen Zs to offline radio brands and their news are: educative and entertaining news content (51%), credible and reliable news content (43%), updates on current affairs (37%), competent and professional journalists (34%) and news content that is simple and easy to understand (26%). The other elements mentioned are presented in figure 33 below.

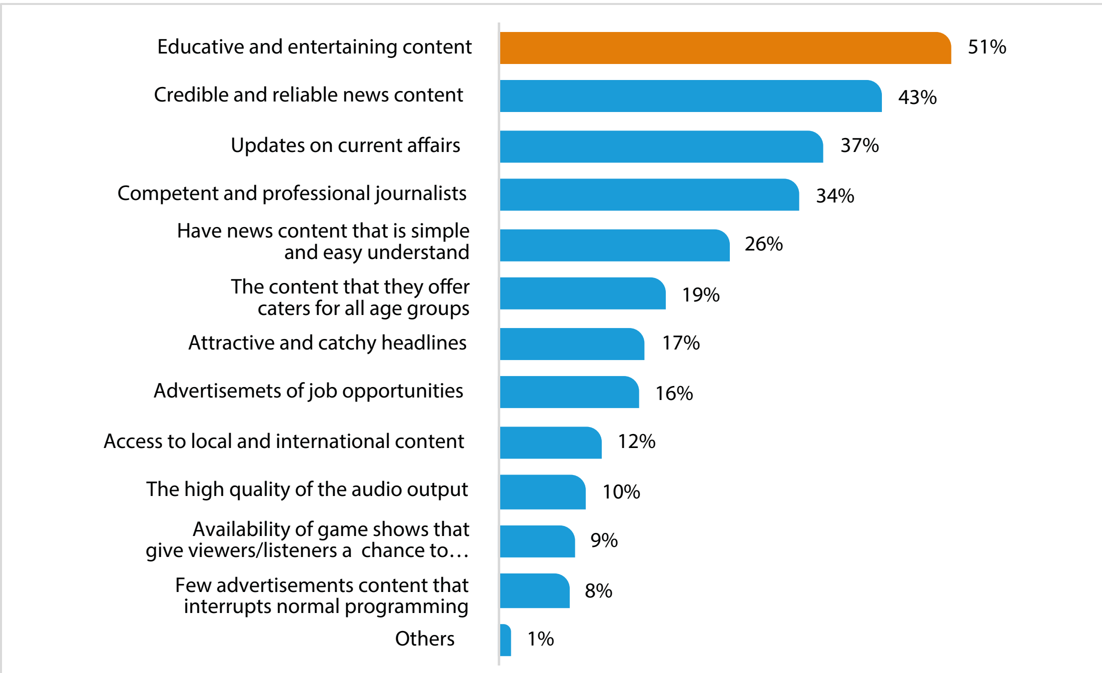



*Figure 31: Factors that Attract Millennials and Gen Zs to Radio Brands and their News*

The findings above indicate that whereas for TV credibility and reliability (52%) is the top element mentioned by many millennials and Gen Zs as attracting them to TV Brands and their news, for radio, the top element mentioned by many is educative and entertaining content (51%). Nevertheless, in both TV and radio these are the top two elements which underscore the millennials and digital natives' belief that legacy media is the platform to go to for credible, reliable, educative and entertaining content.

### 3.4.8 What Radio Brands Need to Work on to Attract the Youth

The key areas that the surveyed youth reported radio brands should work on to attract more young people include areas of content, with 32% mentioning that radio content should focus on youth empowerment and educative content and 20% indicating that radio should work on entertaining content such as trending topics, while 9% indicated the need to work on current affairs. The other mentioned areas are as presented in figure 30 below.

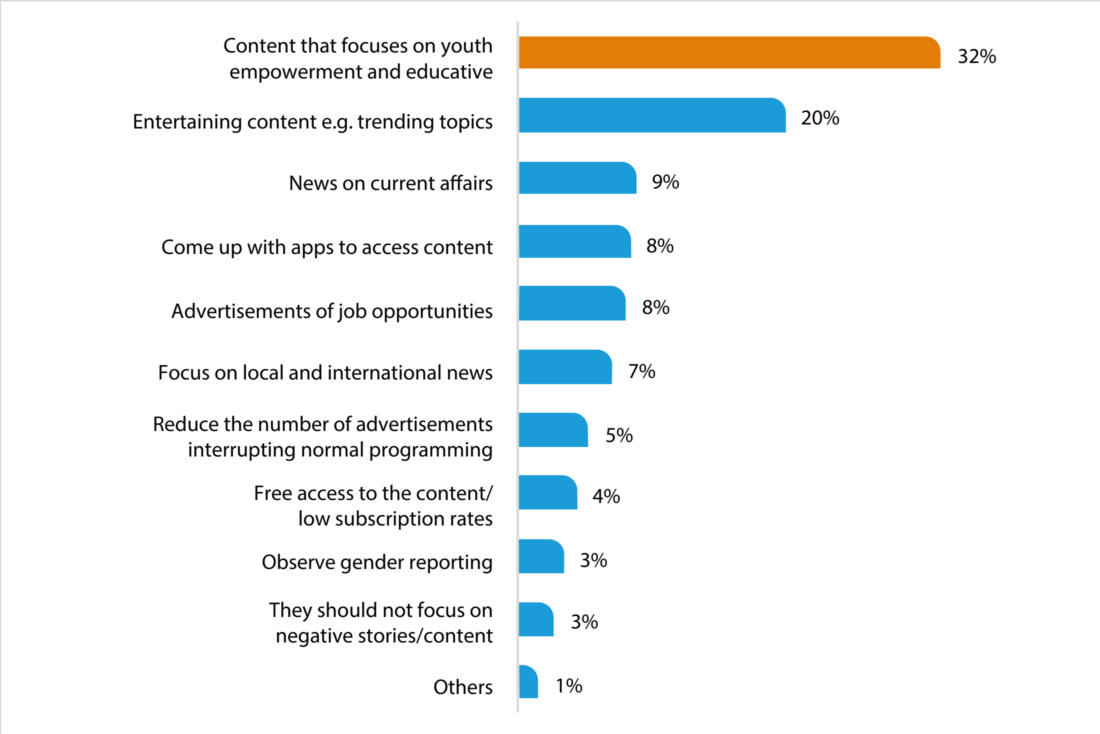



*Figure 32: Areas that Radio Brands Should Focus on to Attract the Youth*

### 3.4.9 Newspaper Brands Consumed by the Millennials and Gen Zs

The findings on millennials platform preferences for general information indicates on 19% rely on newspapers for general information. However, it does appear that the millennials and Gen Zs read offline newspapers, and the encouraging sign is that only 49% of the respondents indicated that they do not read any of the newspaper brands. The top newspaper brands that they read are Daily Nation (31%), Standard Newspaper (18%), Taifa Leo (14%) and People Daily (12%).

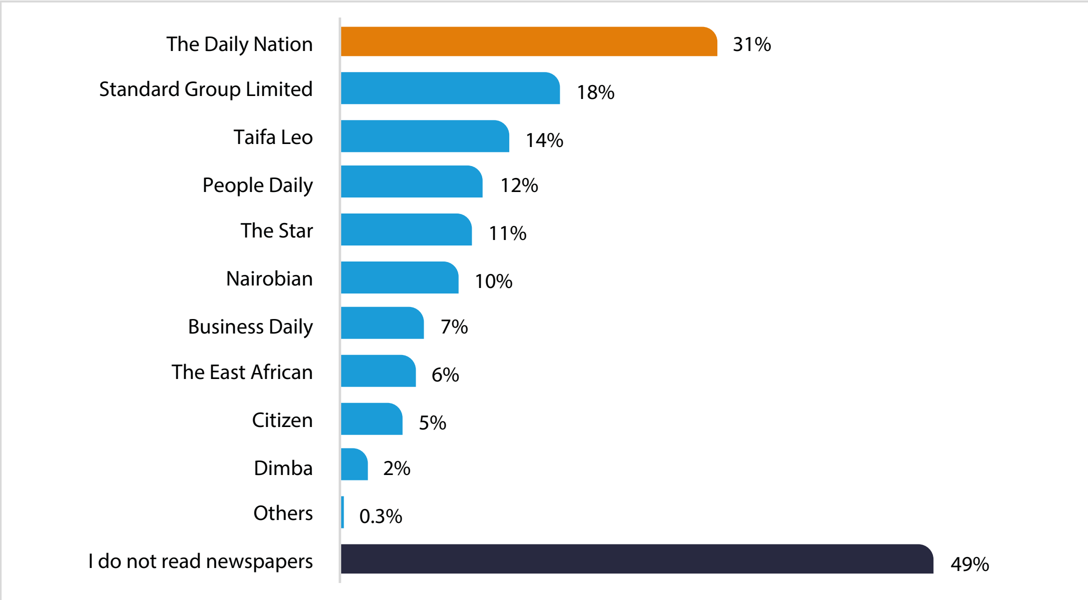



*Figure 33: Newspaper Brands Consumed and Relied on for News Offline*

### 3.4.10 Elements that Attract the Millennials and Gen Zs to Newspaper Brands and their News

Newspapers, just like TV and radio, are attractive to millennials and Gen Zs because they find the news credible and reliable (46%), educative and entertaining content (42%) and important for providing updates on current affairs (35%). The other elements that make newspaper brands and their news attractive to millennial and Gen Zs are the competent and professional journalists (29%) and the element of news content that is simple and easy to understand (28%). These findings suggest that millennials and Gen Zs seem to focus slightly more on credibility and reliability in making the choice of the brand of newspaper to consume, as they do for TV and radio.

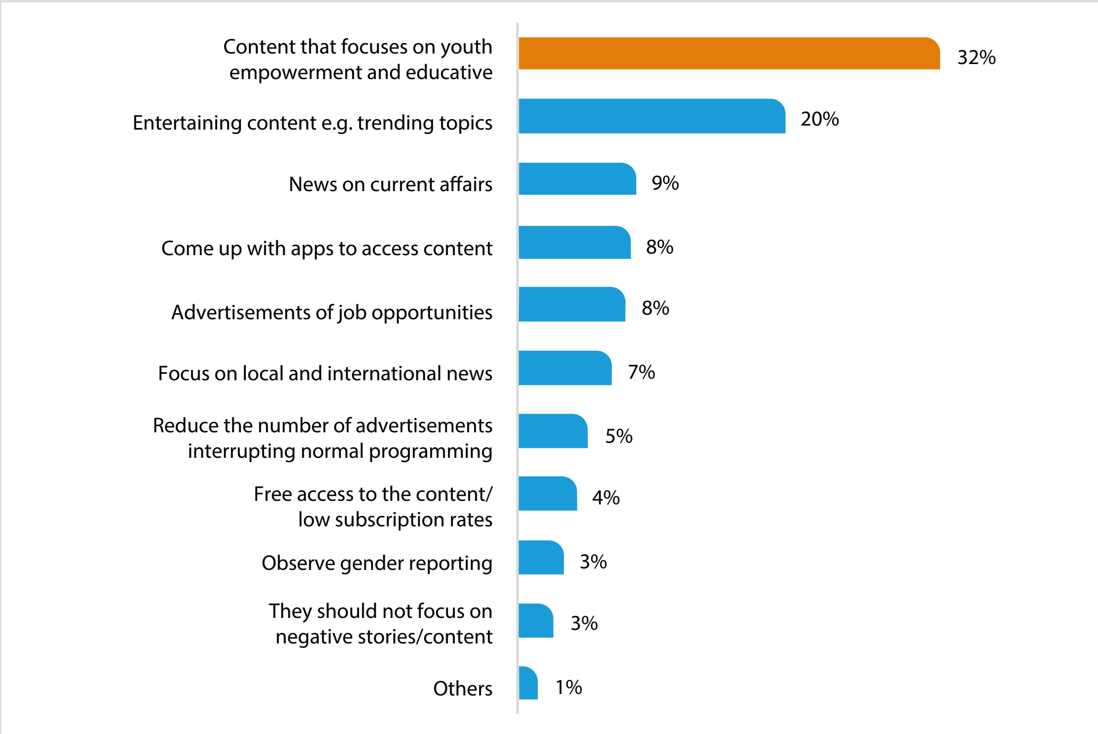



*Figure 34: Factors that Attract Millennials and Gen Zs to Newspaper Brands and their News.*

## 3.4.11 What Newspaper Brands Need to Work on to Attract the Millennials and Gen Zs

The respondents noted that the top priority areas that newspaper brands need to work on to attract the youth is in content, with 30% of the respondents indicating that newspaper brands need to offer content that focuses on youth empowerment and education. The second area is in advertisement of job opportunities (14%), followed by a focus on entertaining content such as trending topics (12%). A further 11% of the respondents indicated that newspapers need to come up with Apps for accessing content. Figure 33 below present the other areas.

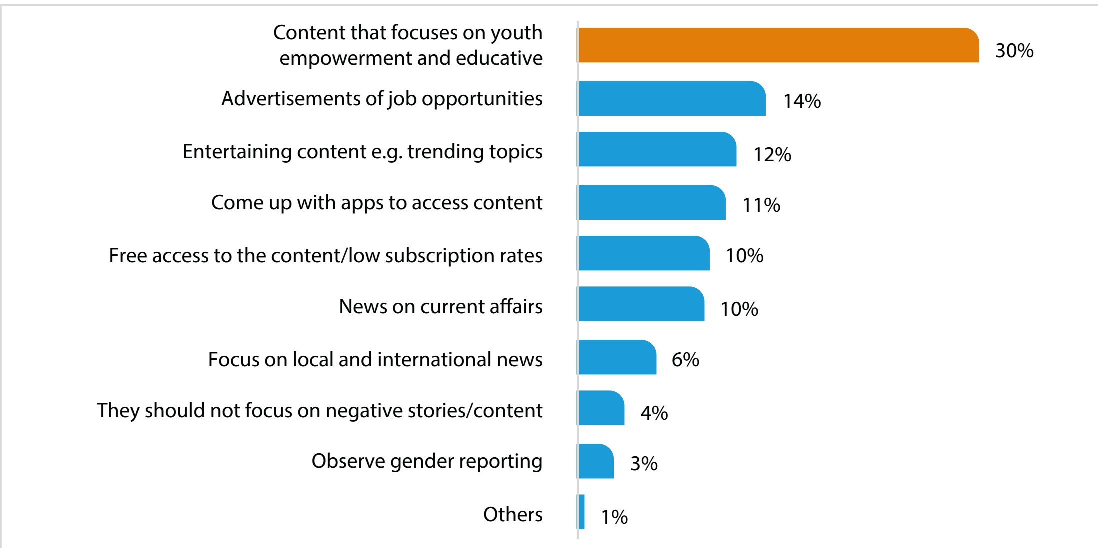


*Figure 35: What Newspaper Brands Need to Work on to Attract Millennials and Gen Zs*

### 3.4.12 Digital News Media Sites Consumed by Millennials and Gen Zs

Tuko News is the most consumed and accessed digital news site, with 39% of the surveyed millennials and Gen Zs reporting that they subscribe to tuko.co.ke to access news online. The findings indicate that the top ten digital news sites consumed by the youths are dominated by digital native news websites, with only Citizen Digital (24%) in the top five. Standard (15%), The Star (13%) and Nation.Africa (8%) are all trailing established digital native news sites like Mpasho (22%), Pulselive (21%) and Ghalfa (21%) as the most consumed and accessed sites as shown in figure 34 below.

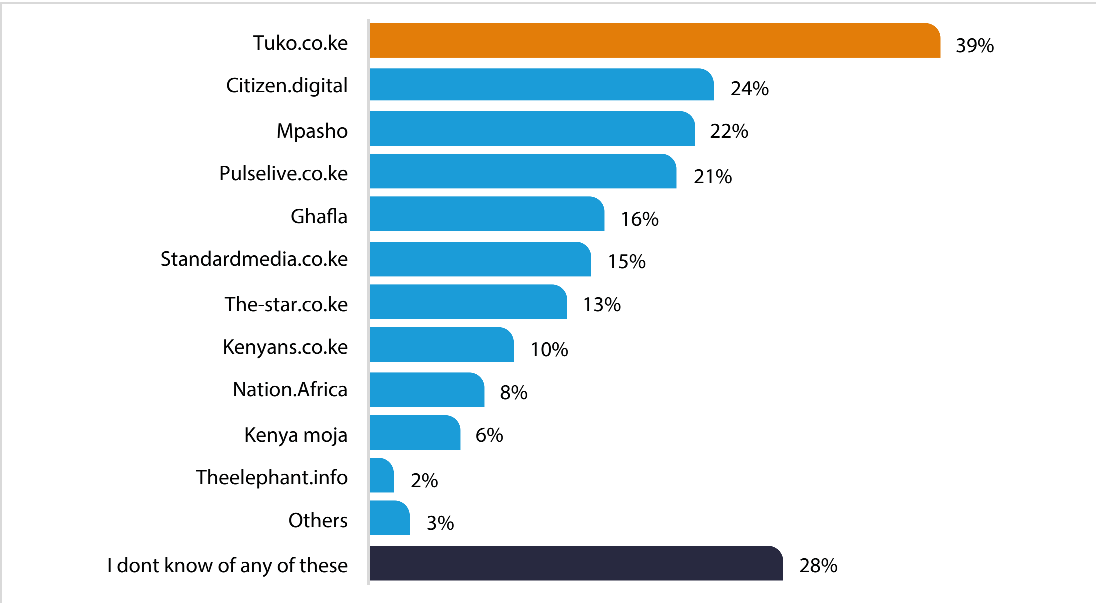



*Figure 36: Digital News Media Sites Consumed and Accessed by Millennials and Gen Zs*

The findings from the digital tracking also confirms Tuko News as the most consumed digital news site. Based on the digital tracking, YouTube, though not a digital native news site by a media organisation, also ranks highly as the second most consumed platform for news on the digital platform. The millennials and Gen Zs in the FGDs noted that they go to YouTube for content produced by different television brands in Kenya and other content producers. Therefore the 21% of the time spent on YouTube is essentially time spent consuming among other content, content from a variety of producers including some of the media brands included in the tracking results.

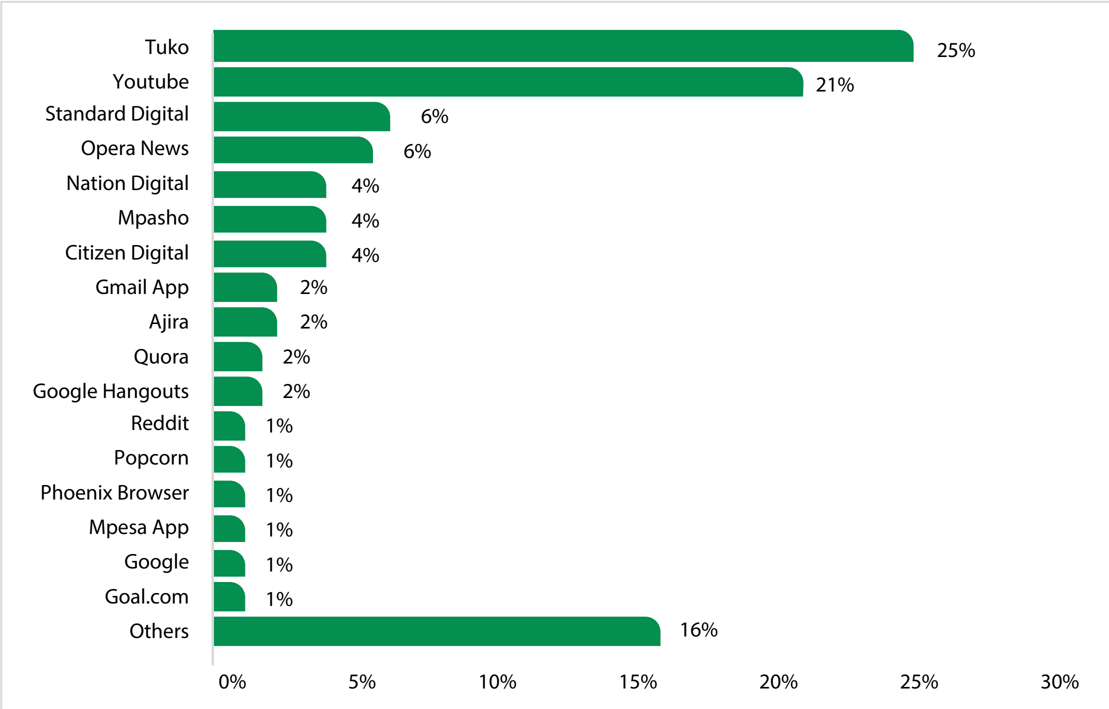



*Figure 37: Most Consumed Digital Native News Sites from the Digital Tracking*

### 3.4.13 Following Stories on Legacy/Mainstream Media Through Social Media

Social media and news alerts and/or links on the digital platforms seem to be playing a key role in leading millennials and Gen Zs to legacy media news platforms. The findings indicate that 73% of the surveyed respondents follow news stories on legacy media news websites from the alerts and/or links on social media platforms every time they log onto the social media platforms. Another quarter (25%) follow stories through social media and news alerts and/or links sometimes, but not frequently, whereas only 1% indicated that they never follow news stories on social media through to the producer's legacy media website, as shown in figure 35 below.

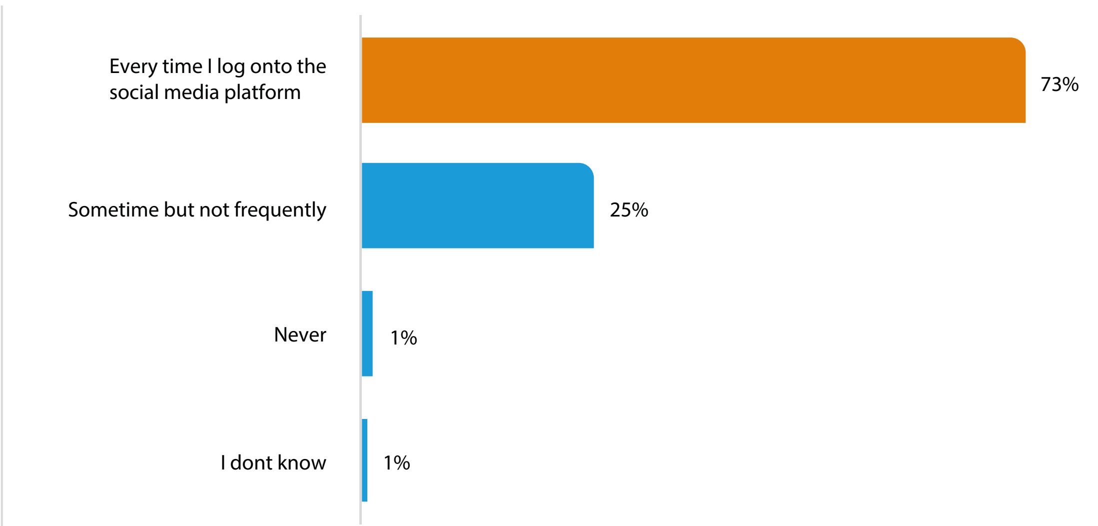



*Figure 38: Following Stories from Social Media Platforms to Legacy/Mainstream Media*

### 3.4.14 Top Three Platforms for Accessing Specific Information

The survey established that most of millennials and Gen Zs predominantly rely on TV, social media and radio, in that order, for news and information on politics and governance, current affairs and entertainment. Social media (64%) leads as the most preferred platform for job opportunities followed by TV (40%) and newspapers (30%), while for personal development most rely on social media (66%), followed by TV (52%) and radio (33%).

*Table 8: Platforms for Accessing Specific Information*

| | Politics and governance | Current affairs | Job opportunities | Entertainment | Personal development |
|---|---|---|---|---|---|
| **Television** | 70% | 72% | 40% | 74% | 52% |
| **Radio** | 46% | 45% | 27% | 51% | 33% |
| **Newspapers** | 17% | 19% | 30% | 10% | 17% |
| **Social media** | 62% | 69% | 64% | 74% | 66% |
| **Legacy media digital platforms** | 6% | 9% | 11% | 9% | 11% |
| **Digital native platforms** | 14% | 14% | 14% | 13% | 15% |
| **Personal news blogs** | 2% | 2% | 5% | 4% | 10% |
| **Job websites (i.e BrighterMonday)** | - | - | 2% | - | - |
| **Others** | 0.3% | 0.1% | 1% | 0.4% | 0.1% |
| **I do not subscribe to this content** | 8% | 3% | 13% | 1% | 9% |

The quantitative data above suggest that even though TV is the platform millennials and Gen Zs go to for specific information, especially politics, governance and current affairs, social media has emerged as a dominant platform that millennials and Gen Zs go to for personal development and job opportunities by fairly big margins relative to the legacy media. For politics, governance and current affairs, TV seems to be enjoying credibility and reliability that comes with legacy media, and these findings seem to buttress the millennials calls for legacy media to have more personal development and youth empowerment content.

The responses from the FGDs further underscore the credibility millennials attach to legacy media as it emerged that they believe that TV and generally legacy media provide reliable and accurate information processed by professionals. From the FGD it also emerged that LinkedIn is the most relied upon platform for job opportunities. Generally, social media platforms are trusted as sources of entertainment that allow for engagements and participation in real time, which the millennials and Gen Zs value more than the one-way entertainment content provided by the legacy media. Another online platform that the youth prefer is YouTube, and from the FGDs it emerged that these millennials and Gen Zs appreciate YouTube because it provides stories on personal experiences and allows users to give feedback. In a nutshell, youth rely on specific platforms for specific needs based on packaging, visual aspect, level of detail and general preferences, triggered by the networks a particular consumer is connected to.

**...There are Instagram accounts that post job opportunities every day....**
*FGD Respondent, Nairobi*

**...I think it's how different sites are packaged. If I need credible job information, I'll go to LinkedIn. Anything to do with fashion, I'll go to Instagram, politics. I need twitter due to the authenticity of the information....**
*FGD Respondent, Kisumu*

**...they bring you a lot of ads and some will attract your eyes; then you end up clicking and you get the information you read and exit later....**
*FGD Respondent, Nairobi*

**...It all depends on one's specific preference such as job search and that leads one to visit different sites. For example, there is a site where you would go for news relayed in Sheng. For me, I like YouTube because it has different recipes. Thus, choice of platform depends on your personality and profession....**
*FGD Respondent, Nairobi*

**...We get them from social media and that is because of the reliability of data...**
*FGD Respondent, Mombasa*

**...There are platforms we believe provide certain information like if I need content on food....**
*FGD Respondent, Kisumu*

**...specific platforms for gossip, business, and entertainment....**
*FGD Respondent, Nakuru*

### 3.4.15 Platforms Relied on for News and Entertainment

The survey established that almost half (45%) of the respondents rely on social media for both news and entertainment. Another 32%, rely on television for both news and entertainment whereas 14% depend on radio. Digital native news platforms, despite receiving high mentions as the most accessed and consumed digital news platforms, are less relied on for news and entertainment with only 3% of the surveyed respondents saying that they rely on digital native news platforms and newspapers. Important to note, however, is the fact that only 2% the millennials and Gen Zs surveyed reported that they rely on legacy media digital platforms for news and entertainment as shown in figure 36 below. These findings suggests that the distrust of established news media on the digital platforms established in previous studies might extend beyond the college-age groups, which has been found not to trust digital news platforms even when these digital news platforms, such as Google News and Yahoo! News, aggregate and use news from media organisations and reputable news agencies including as sources. [xv] The reliance on social media platforms for news and entertainment can be explained by millennials' and digital natives' high proclivity for platforms that allow them to consume content while at the same time contributing via participatory media, something that social media provides. However, the findings also suggest that media houses may want to reimagine, pursuant to suggestions in previous findings,[i] how to produce content that is native to social media and other digital platforms including mobile phones that are preferred by millennials and Gen Zs.

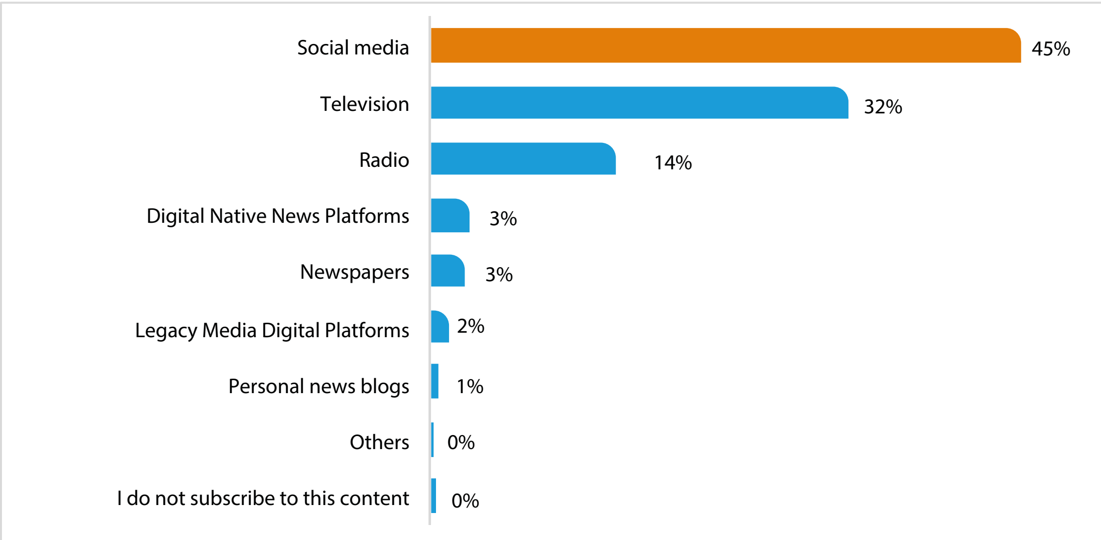



*Figure 39: What Platform do you Most Rely on for both News and Entertainment?*

### 3.4.16 Most Trusted Media Platforms

Television (46%), social media (31%) and radio (12%) are the top three most trusted platforms. However, one percent of the surveyed youth do not trust any media, while the least trusted media platforms are digital native platforms (2%) and personal news blogs (1%).

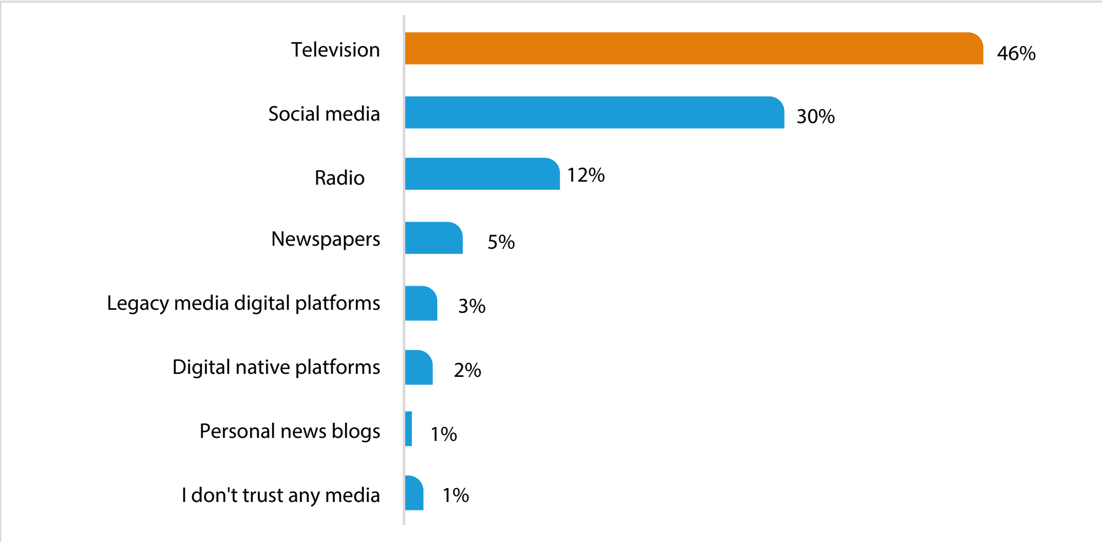



*Figure 40: Which Media Platform do you Trust the Most*

FGD participants were near unanimous that information received from television is the most trusted, and it did emerge that millennials and Gen Zs believe that TV news and content generally is thoroughly researched and verified. The perception of structures and laid down editorial processes by the legacy media also plays a big part in the trust millennials and Gen Zs have in TV. Most of the participants in most of the FGDs also noted that social media platforms are more of the gateway to the legacy media, and they are only relied on and trusted as touch points of information alerts which are then verified on legacy media platforms. Only social media sites with a tradition for posting credible information are trusted not to warrant verification on legacy platforms. However, it also emerged in the FGDs that social media platforms are trusted because they give consumers the opportunity to call out glaring misinformation and disinformation, and often there are consumers who have insightful comments that help others attach different levels of attention and even credibility to content. Nevertheless, the findings from both the quantitative survey and the qualitative phase seem to suggest that given social media's prominent role as the first point of news and information which is then followed on legacy media platforms, legacy media need to leverage on social platforms in their efforts to capture the attention of millennials and Gen Zs and build traffic to their platforms. The need for reimagining social media strategies is further underscored by the 73% of the millennials and Gen Zs who indicated that they follow alerts and links on social media through to the legacy media platforms every time they log onto social media platforms.

**...would go for the TV because they have solid evidence of what they present and even when we get links on social media, we follow through to TV news platforms....**
*FGD Respondent for Nakuru male*

**...most trusted platform is social media platform because I work with it....**
*FGD Respondent for Nairobi male*

**...I trust digital TV like the Citizen but I can't trust Opera Mini, ....**
*FGD Respondent for Mombasa*

**...My most trusted platform is social media because I work with it and I use it a lot and because of ease of use and it has become something I use everyday use so am an addict to it. There are also more users some who give more information that helps to tell whether the content is legit or not....**
*FGD Respondent for Kisumu*

**...TV is programmed and even if you had queries, you wouldn't be able to ask....**
*FGD Respondent for Mombasa female*

### 3.4.17 Devices Used to Consume News and Information

The survey established that mobile phones devices (59%) are the most frequently used devices to consume information. Other devices that are relied on by a significant proportion of the youth include TVs (23%) and radios (10%). On the other hand, the least used devices are computer/laptops (4%), newspapers (2%) and tablets (1%).

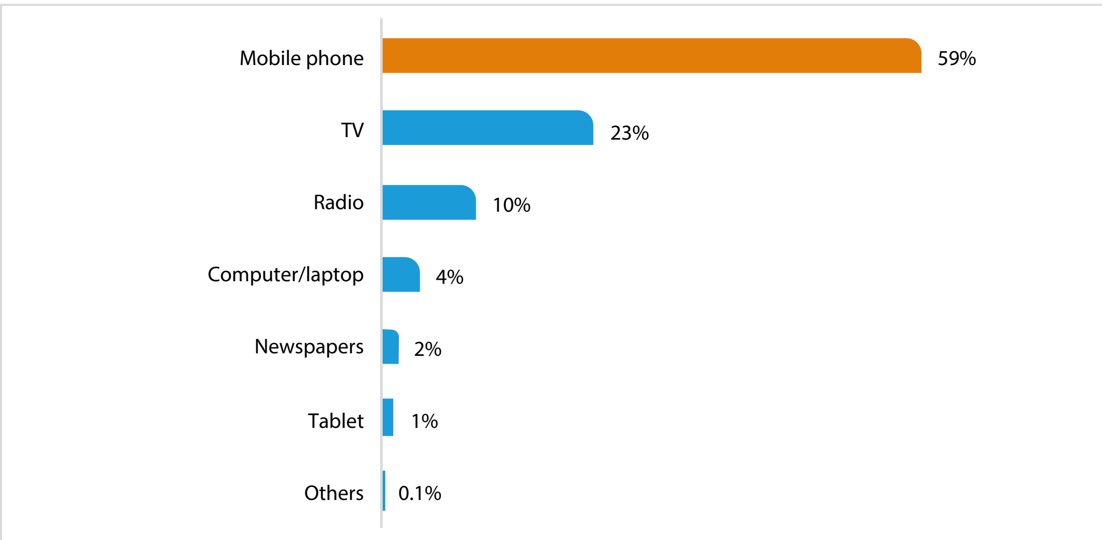



*Figure 41: Devices Used to Consume Information*

Studies have shown that most of the millennials and Gen Zs who have grown up in the digital era have been enculturated to a life of accessing and consuming news on the digital platform as their native culture. [i vii] To this end, and given the emergence of mobile phones as the dominant platform for news consumption, content producers targeting the youth must also think of content that is native to these platforms.[i] Therefore, the need to produce content that can be consumed on the online platforms as the terminal platform of consumption should be emphasised along with the strategy of using these online platforms as pathways to the legacy media platforms through links and alerts. Participants in the FGDs further explained that mobile phones are preferred devises in consumption of news and media content because they are accessible and portable and allow for instant access to information regardless of situation and context. Therefore, native content for mobile phone devices and other online platforms need to be alive to the reality of the different context consumption via mobile phones might take.

**...I think mobile phones have taken over because they are easily accessible and easy to carry and if I want to get news and I am traveling, it is hard to wait to watch the TV. The information is also current and for the TV and radio, I have to wait for a certain time to get the information. Once I have my bundles on, I just switch on....**
*FGD Respondent, Nairobi*

**...I think they are easily accessible and are with us through the day and night....**
*FGD Respondent, Nakuru*

**...This is because most people have phones and it makes work easier. It is more or less a must to have a mobile phone. It is cheap and portable and you can access all platforms easily and they are also easy to use....**
*FGD Respondent, Mombasa*

**...as a youth, you have to go out and leave the house very early in the morning to either go for hustle or to school so you will not get that time to watch the news, but for your phone, it's multipurpose, you can use it to make a call and also consume news...**
*FGD Respondent, Mombasa*

**...It's also cheaper compared to buying a magazine. I can use bundles to get information from different platforms, from news to gossip and use them for different purposes like accessing dating sites. Mobile phones have made everything easy...**
*FGD Respondent, Nairobi*

## 3.5 Theme V: Perception Of Legacy Media

To determine how the youth perceive legacy media, the survey interrogated whether the news content was relevant, trustworthy, balanced, appropriate and suitable. Recent studies have established that Kenyans generally trust news brands, with most established brands scoring 80 plus brand trust scores.[1] However, these studies have focused on the general population and not the youth. The current study focused on millennials and Gen Zs and sought to find out their level of trust in legacy media online platforms. About a half of the surveyed millennials and Gen Zs consume news from the online platforms of mainstream news media daily. Most of the surveyed youth agreed that the news from legacy media online platforms is relevant to them. Equally, 59% agreed that the news is credible, reliable, and trustworthy.

### 3.5.1 News Consumption Frequency on Mainstream Media Online Platforms

About a half (48%) of the surveyed Gen Zs and millennials reported that they consume news from online platforms of mainstream/legacy news media daily. Some 14% consume news once a week, 23% consume news several times a week while 3% do so once a month. Only, 7% noted that they do not consume news from online platforms mainstream/legacy media frequently, as presented in figure 39 below.

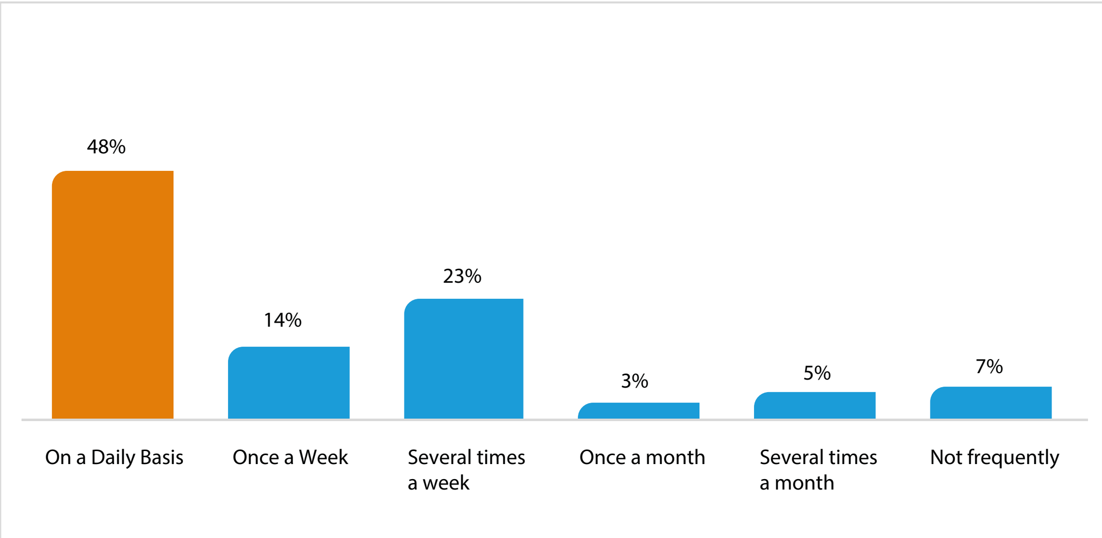



*Figure 42: News Consumption Frequency on Mainstream Media*

Generally, regional findings mirror overall findings. Nonetheless, Coast (60%) and Nairobi (53%) account for the regions with the highest numbers of youth who consume news on online platforms of mainstream media daily.

1 2021 Digital News Report - Kenya | Reuters Institute for the Study of Journalism (ox.ac.uk)

*Table 9: News Consumption Frequency on Mainstream Media by Region*

| | On a Daily Basis | Once a Week | Several times a week | Once a month | Several times a month | Not frequently |
|---|---|---|---|---|---|---|
| **Coast** | 60% | 11% | 16% | 1% | 3% | 9% |
| **North Eastern** | 42% | 41% | 10% | 6% | - | 1% |
| **Eastern** | 20% | 20% | 18% | 3% | 18% | 20% |
| **Central** | 38% | 13% | 35% | 4% | 5% | 6% |
| **Rift Valley** | 49% | 15% | 25% | 4% | 3% | 3% |
| **Western** | 29% | 24% | 26% | 14% | 6% | 1% |
| **Nyanza** | 46% | 16% | 35% | - | - | 3% |
| **Nairobi** | 53% | 10% | 20% | 3% | 7% | 7% |
| **Total** | 48% | 14% | 23% | 3% | 5% | 7% |

### 3.5.2 Relevance, Credibility and Balance News by Legacy/Mainstream Media

Majority (59%) of the surveyed millennials and Gen Zs agree that the news on legacy media platforms is relevant to them and 59% of the youth agree that the news on legacy media online platforms is credible, reliable and trustworthy, while slightly more than half (51%) agree that news from legacy media online platforms is balanced. However, the findings suggest that a significant percentage of millennials and Gen Zs may not have a favourable perception of legacy media as 41% were either indifferent or disagreed with the statement that news in the legacy media is relevant to them as youth. In addition, 41% and 49% were also indifferent or disagreed with the credibility/reliability/trustworthiness and balanced news from the legacy media respectively.

*Table 10: Perception of Legacy /Traditional Media*

| | Disagree | Neither agree nor disagree | Agree |
|---|---|---|---|
| The news that there is, in legacy media is relevant to me as a youth | 13% | 28% | 59% |
| The news that there is, in legacy media is credible, reliable and trustworthy | 15% | 26% | 59% |
| The news from legacy media platforms is balanced | 16% | 33% | 51% |

Therefore, whereas findings in this study have established that millennials and digital natives, to a large extent, consider legacy media online platforms credible, reliable and characterised by competent professionals, the over 40% who seem to be indifferent or in disagreement in their perception of legacy media should be of great concern to legacy media managers. The concern is further heightened by the fact that a majority of the millennials and Gen Zs choose their favourite legacy media brands on the basis of credibility and reliability with findings in this study indicating that of the surveyed respondents, 52% for TV, 43% for radio and 46% reported that they discriminate on the brands they consume on the basis of credibility and reliability.

Qualitative findings indicate that the main reasons why the youth tend to disagree that news on the legacy media platforms such as television, newspapers, and radio are relevant, credible, reliable, trustworthy and balanced is because they believe legacy media is almost always outdated. The platforms are viewed as analogue, bulky, costly, and inflexible. They note that legacy media platforms are not flexible, the programmes are fixed, sometimes long and information filtered. However, it also emerged from the FGD that they appreciate that online content by legacy media is easily accessible through phones, is shareable and provides for instantaneous and continuous interaction.

**...For TV, we migrated to digital and you have to pay a decoder to watch and newspapers are too costly. The last time I bought it, it was at sixty shillings, while on the other hand you can just buy bundles and access the internet...**
*FGD Respondent, Kisumu*

**...Information goes through social media fast before getting to the radios and TV. Most people get information first through the social media. So, people don't have the reason to go back to TV or to buy newspapers to recheck such information...**
*FGD Respondent, Kisumu*

**...Phones allow us to go to different platforms and give a comment about something like for now people are boycotting high living standards so the voice of the people can be heard through the apps....**
*FGD Respondent, Nakuru*

**...It's also cheaper compared to buying a magazine...." FGD Respondent, Mombasa**
**...It's convenient and portable....**
*FGD Respondent for Nakuru male*

**...So, I don't think they satisfy each person universally. But in social media you have access to all types of things from different places...**
*FGD Respondent, Kisumu*

**...I don't think you can get traditional platform where you can get all information like social media where people give their views so you have to depend on both platforms to get information...**
*FGD Respondent, Mombasa*

**...Looking at Twitter, most of the tweets are normally open or anonymous thus would be open, free to speak to whatever they want and looking at WhatsApp it would be very difficult as one would be very reserved more so on what people will think...**
*FGD Respondent, Mombasa*

### 3.5.3 Entertainment Needs

Majority of the surveyed millennials and Gen Zs (89%) acknowledge that the media serves their entertainment needs.

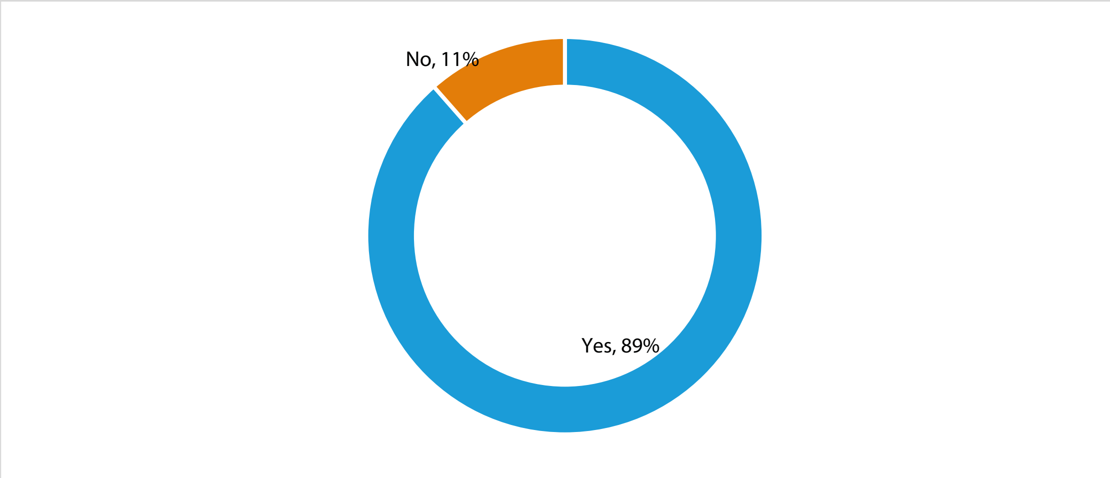



*Figure 43: Entertainment Needs*

The figure below presents the findings by region and Nairobi (96%), Nyanza (95%), Coast (93%) and Central (92%) account for the highest proportions of surveyed youth who reported that their entertainment needs are being met by the media. However, Western (24%) and Rift Valley (23%) accounted for the highest proportions of the surveyed Gen Zs and millennials who indicated that their entertainment needs were not being met by the media.

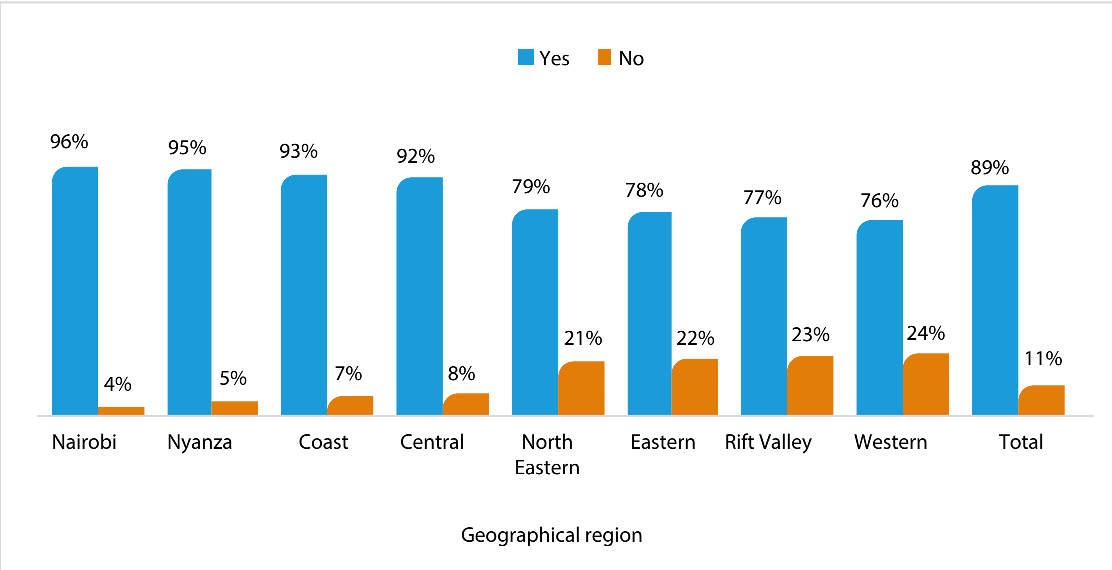



*Figure 44: Entertainment Needs by Region*

### 3.5.4 Needs in Different Genres/Content Areas

Broadly, most of the surveyed millennials and Gen Zs agreed that their needs in other genres of content areas such as current affairs, political news and reality shows are met by the media. However, other than current affairs and political news content, the other genres have a third or more of the respondents who reported that either their needs are not being met or they do not subscribe to the content as shown on the table 27 below. These findings do suggest that the media can do more in meeting the needs of millennials and Gen Zs by producing more feature stories that answer the questions of why/how. Based on the findings in this study, it does appear that these feature stories should focus more on how attain their personal goals, make more money and become financially independent.

*Table 11: Entertainment Needs Being Met and those not Being Met*

| | Being met | Not being met | I do not subscribe to the content |
|---|---|---|---|
| General current affairs | 83% | 12% | 6% |
| Political news content | 75% | 11% | 15% |
| Non-news content (inspirational, educational, conversational) | 70% | 18% | 13% |
| Reality shows | 69% | 18% | 14% |
| Dramatic Content | 67% | 20% | 13% |
| News coverage on matters affecting rural areas and marginalised communities such as insecurity, drought, cultural practices | 67% | 22% | 11% |
| Sports news content | 66% | 12% | 21% |
| Business news content | 66% | 16% | 17% |
| Feature Stories – in depth news stories that provide context and answer more of why/how | 65% | 24% | 11% |
| Other sports content (games) | 60% | 16% | 24% |
| Children programmes | indicated59% | 17% | 24% |

### 3.5.5 Complementarity of Legacy and Digital Media Platforms

The survey established that there is some element of complementarity between the legacy media platforms and the digital media. The findings indicate that 61% of the surveyed millennials and Gen Zs agreed that they consume news and information content from both the digital media and mainstream/legacy media platforms like radio, TV and newspapers and that only 13% disagreed. However, the findings further suggest that digital/social media has an edge as 58% agreed that they consume much more news and information content on digital or social media than on mainstream/legacy media, with 22% disagreeing. Nevertheless, the complementarity thesis is underscored by the findings that 61% of the millennials and Gen Zs disagreed with the statement that they do not consume news from the digital platform at all and 63% disagreed with the statement that they do not consume news from the mainstream/legacy platforms such as TV, radio and newspapers at all as shown on the table 12 below. These findings buttress earlier findings in this study on the emergence of digital media and specifically social media as a critical strategic platform for legacy media, if they are to leverage on the millennials and digital natives. This demographic seems to value legacy media for credibility and reliable news but are predominantly on social media platforms from where they follow news alerts and links on social media to legacy media brands. The findings that millennials and Gen Zs perceive the legacy and digital media as complementing each other in addressing their content and media consumption needs suggest that they still perceive legacy media as important to them going into the future.

*Table 12: Agreement with Different Statements on Legacy/Digital Media Consumption*

| | Disagree | Neither agree nor disagree | Agree |
|---|---|---|---|
| I consume news and information content from both the digital media and the traditional platforms like radio, TV and newspapers. | 13% | 26% | 61% |
| I find myself consuming news and information content from digital or social media much more than on the traditional platforms like TV, radio and newspapers | 22% | 21% | 58% |
| I do not consume news from digital platforms at all | 61% | 20% | 18% |
| I do not consume news from traditional platforms such as TV, radio and newspapers at all | 63% | 18% | 19% |

## 3.6 Other Key Findings

### 3.6.1 Most Millennials and Gen Zs Consume Media at Home

The survey established that millennials and Gen Zs consume media in different locations, but their homes appear to be the location where they access and consume the media most of the time as it was mentioned by 84% of the respondents followed by work (41%), and then 24% who mentioned that they access or consume the media on their way to work/home/school. Only 16% reported accessing the media they consume at school.

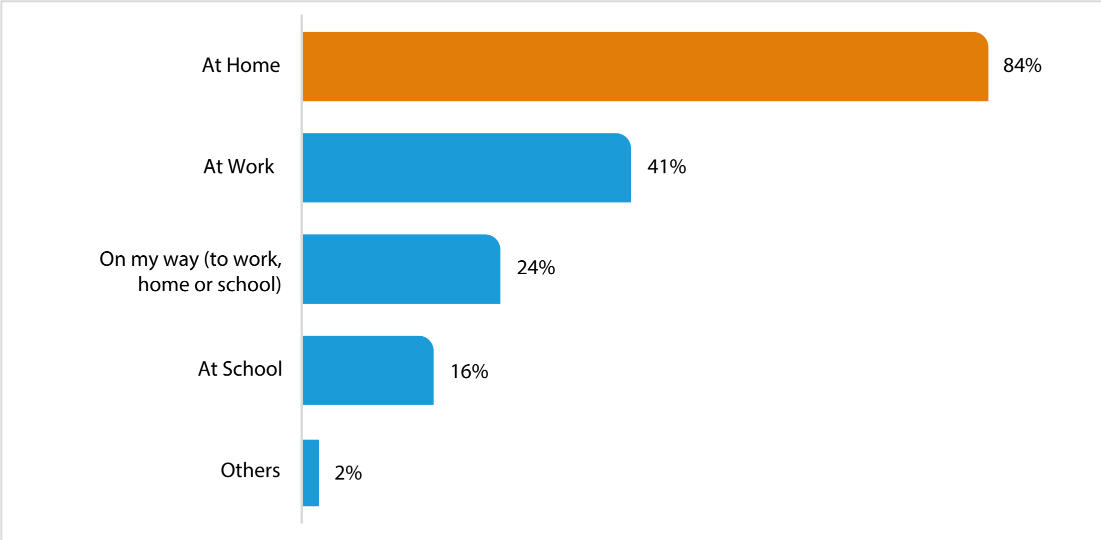



*Figure 45: From Where do you Access the Media you Consume*

### 3.6.2 Data Bundles Key in Accessing Information Online

Most of the youth rely on data bundles (88%) to access the information they consume through phones/laptops/tablets followed by home Wi-Fi (30%) and work Wi-Fi (22%).

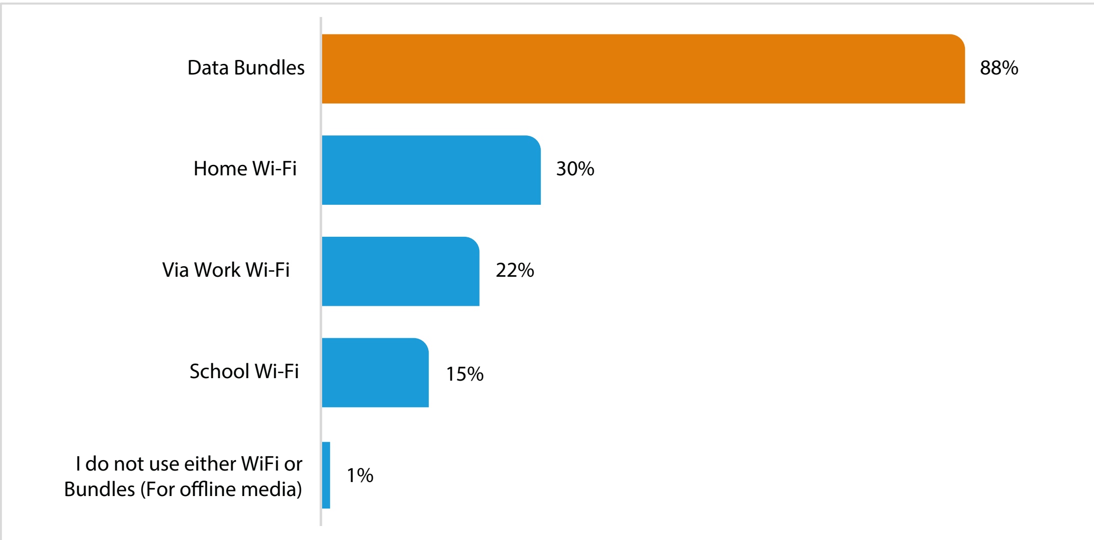



*Figure 46: Means of Accessing Information Online*

### 3.6.3 Average Daily Consumption

The study established that more millennials and Gen Zs (44%) spend more than four hours a day on social media, which is more than triple the number of millennials and Gen Zs that spend more than four hours on radio (13%) and TV (12%). Based on the George Gerbner's cultivation analysis, these findings seem to suggest that heavy consumption of media by the millennials and Gen Zs is predominantly on social media by a majority of this demographic; the other platforms seem to be having more light viewers. Further analysis indicates that when we consider the number that consumes different platforms for three or more hours, social media leads with 69% reporting that they consume social media for three or more hours a day, followed by TV that has 38% reporting that they consume TV for three or more hours a day and then radio with 28% and websites (27%). Digital native media houses (21%) and newspapers (10%) have the least number of millennials and Gen Zs indicating that they consume these platforms for three or more hours a day. Moreover, the findings also indicate that digital native media houses (78%) and newspapers (90%) have the highest number of millennials and Gen Zs reporting that they consume these platforms for two hours or less a day.

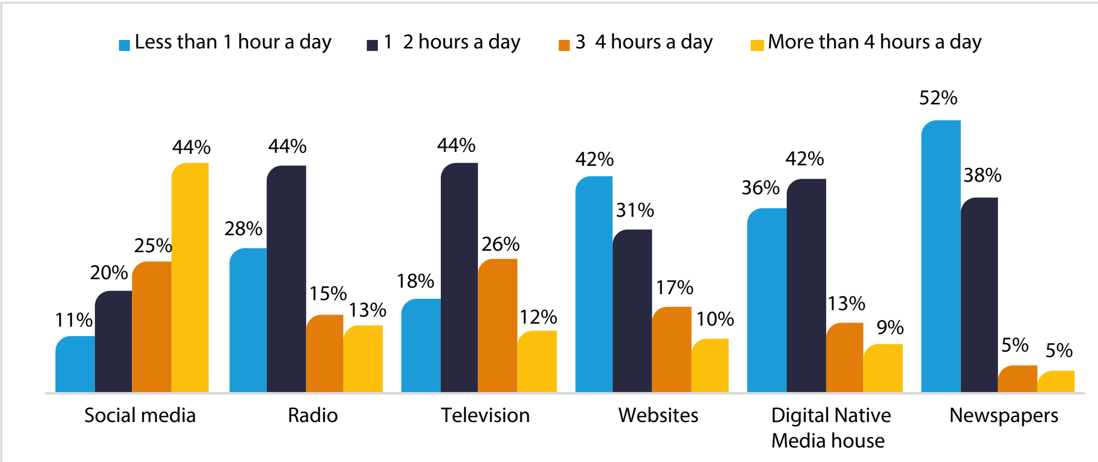
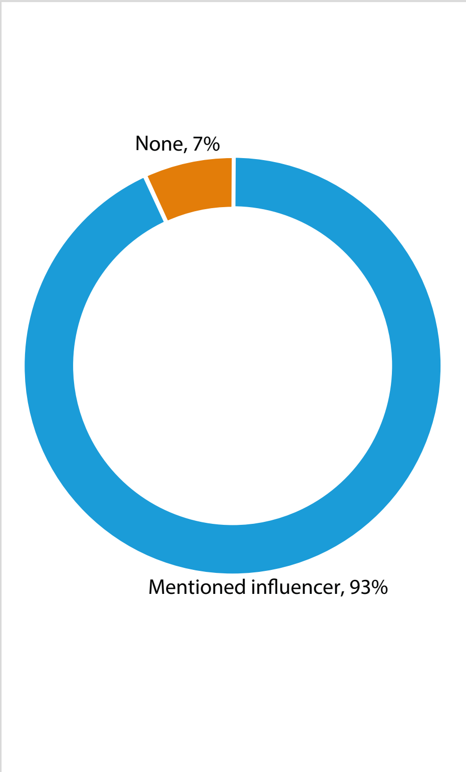



*Figure 47: Average Daily Consumption*

### 3.6.4 Influencers

Nine in every 10 (93%) of the surveyed millennials and Gen Zs believe that the influencers they follow influence them. Of these, 27% mentioned Jalango, another 24% mentioned Daniel Ndambuki (Churchill) whereas 22% mentioned Eric Omondi as their top influencers as presented in the figure 46 below.



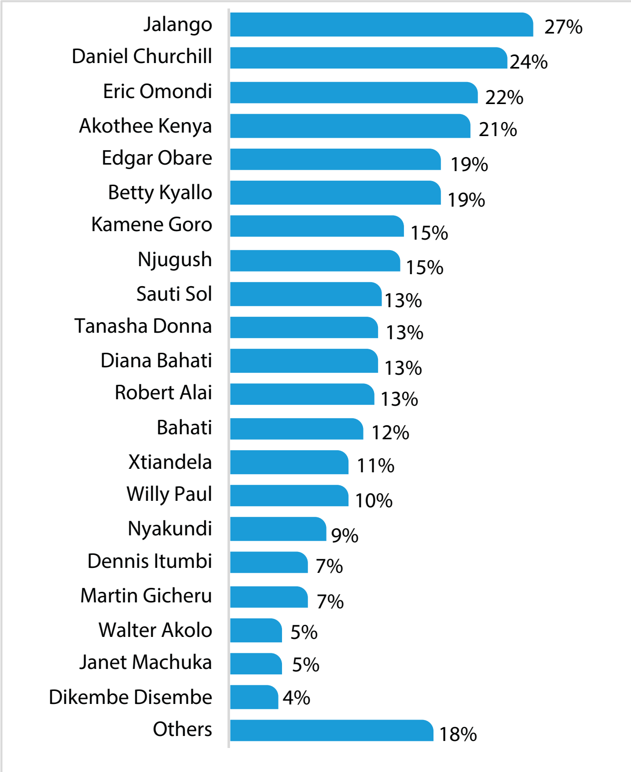




*Figure 48: Top Influencers Followed*

In terms of region, the survey found that the surveyed millennials and Gen Zs who follow Jalango are mostly from Nyanza (36%) and Eastern (34%); Daniel Ndambuki (Churchill) followers are mostly from Central (42%) and Coast (26%) whereas Eric Omondi followers are mostly from North Eastern (30%) and Coast (29%). Details of the findings by region are presented in the figure below:

*Table 13: Top Influencers Followed by Region*

| | Coast | North Eastern | Eastern | Central | Rift Valley | Western | Nyanza | Nairobi | Total |
|---|---|---|---|---|---|---|---|---|---|
| **Jalango** | 31% | 22% | 34% | 28% | 20% | 20% | 36% | 26% | 27% |
| **Daniel Churchill Ndambuki** | 26% | 15% | 26% | 42% | 22% | 13% | 14% | 21% | 24% |
| **Eric Omondi** | 29% | 30% | 22% | 20% | 16% | 20% | 26% | 22% | 22% |
| **Akothee Kenya** | 17% | 7% | 22% | 14% | 23% | 16% | 25% | 26% | 21% |
| **Edgar Obare** | 6% | 5% | 18% | 7% | 18% | 7% | 15% | 32% | 19% |
| **Betty Kyallo** | 12% | 4% | 27% | 16% | 13% | 16% | 20% | 26% | 19% |
| **Kamene Goro** | 8% | - | 7% | 23% | 13% | 8% | 13% | 21% | 15% |
| **Njugush** | 14% | 13% | 25% | 26% | 7% | 10% | 12% | 15% | 15% |
| **Sauti Sol** | 18% | 3% | 7% | 16% | 6% | 10% | 13% | 18% | 13% |
| **Tanasha Donna** | 11% | 4% | 10% | 12% | 8% | 11% | 13% | 19% | 13% |
| **Diana Bahati** | 8% | 4% | 7% | 9% | 8% | 7% | 14% | 22% | 13% |
| **Robert Alai** | 7% | 26% | 12% | 5% | 23% | 17% | 15% | 10% | 13% |
| **Bahati** | 19% | 8% | 10% | 7% | 7% | 12% | 7% | 16% | 12% |
| **Xtiandela** | 3% | 6% | 16% | 3% | 13% | - | 2% | 17% | 11% |
| **Willy Paul** | 15% | 6% | 10% | 10% | 4% | 14% | 9% | 13% | 10% |
| **Nyakundi** | 4% | 6% | 9% | 3% | 7% | 11% | 8% | 14% | 9% |
| **Dennis Itumbi** | 7% | 12% | 9% | 5% | 7% | 6% | 3% | 7% | 7% |
| **Martin Gicheru** | 3% | 2% | 11% | 1% | 5% | 7% | 2% | 13% | 7% |
| **Walter Akolo** | 3% | 3% | 3% | - | 8% | 7% | 4% | 6% | 5% |
| **Janet Machuka** | 4% | 4% | 3% | - | 6% | 3% | 3% | 7% | 5% |
| **Dikembe Disembe** | 4% | 4% | 6% | - | 6% | 2% | - | 6% | 4% |
| **Others** | 18% | 14% | 10% | 22% | 9% | 15% | 20% | 24% | 18% |

Sentiments from the surveyed youth during the qualitative phase indicate that influencers have an impact on the decisions made by most of the youth on what media content to buy and/or consume. Majority of the youth get inspired by influencers, who based on their lifestyles and their different roles as brand ambassadors end up influencing the decisions made by the youth beyond the media they consume. Influencers are also considered role models and they create awareness about brands through their various platforms.

**...If the influencer is famous and good, the product is high quality....**
*FGD Respondent, Kisumu female*

**...Yes, because sometimes I don't have information about something and I know Eric Omondi, I can try what he advertises and try it out and if it works for me, I use it, if it doesn't then I go to other things....**
*FGD Respondent, Nairobi*

**...I believe influencers play a role because most of the youth see them as role models and want to be like them....**
*FGD Respondent, Nairobi*

**...I'd say they have an impact because some of the things I am interested in I do see it on someone's page...**
*FGD Respondent, Nakuru*

**...If one is a socialite then directly he or she is an influencer...**
*FGD Respondent, Kisumu*

**...You know what I can say all of us want to become successful, so most of the time you find you will have to follow somebody who is successful and who can motivate you to follow the same and become successful...**
*FGD Respondent, Nakuru*

### 3.6.5 Duration of Time Spent Online on Different Digital Platforms

The high smartphone penetration rates and the finding that mobile phones (59%) are the device of choice for media consumption has made it relatively easy for millennials and Gen Zs to spend time online regardless of location or situation. The digital tracking findings indicate that of all the tracked millennials and Gen Zs (n=150), none of them spends less than two hours online in a day. The data shows that the majority (55%) spend 6 to 9 hours a day online, followed by 25% who spend 2 to 5 hours and 20% who spend 10 or more hours online.

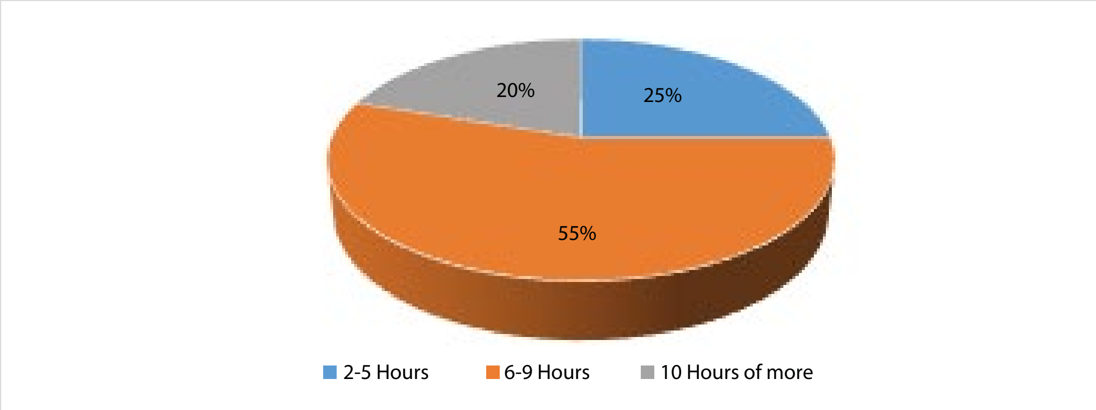



*Figure 49: Time Spent Online by Millennials and Gen Zs on a typical Day*

The tracking shows that millennials and Gen Zs spend relatively many hours online. The participants in the FGDs also noted that the limiting factors that constrain the time spent on digital platforms include limited bundles, lack of internet access, cost of internet bundles and rigid schedules for those at school or work. These findings suggest that even with the limitations occasioned by the reasons given in the FGDs, the time spent online is relatively high, and there is a possibility that for some of the participants who were tracked the likelihood of them having applications such as WhatsApp and Facebook being on even when they are not consuming these apps is real.

### 3.6.6 Amount of Money spent on Digital Platforms

Time spent on the internet is dependent on access, which is directly linked to data and finances. Therefore, time spent is directly related to the amount the millennials and Gen Zs have or can afford to spend on the data to access the internet. Findings from the survey indicate that the majority of the millennials and Gen Zs (60%) spend between KES 1501 and 3000 per month followed by a 25% who spend between nothing and KES 1500. Only 2% spend between KES 4501 and 6000 as shown in figure below.

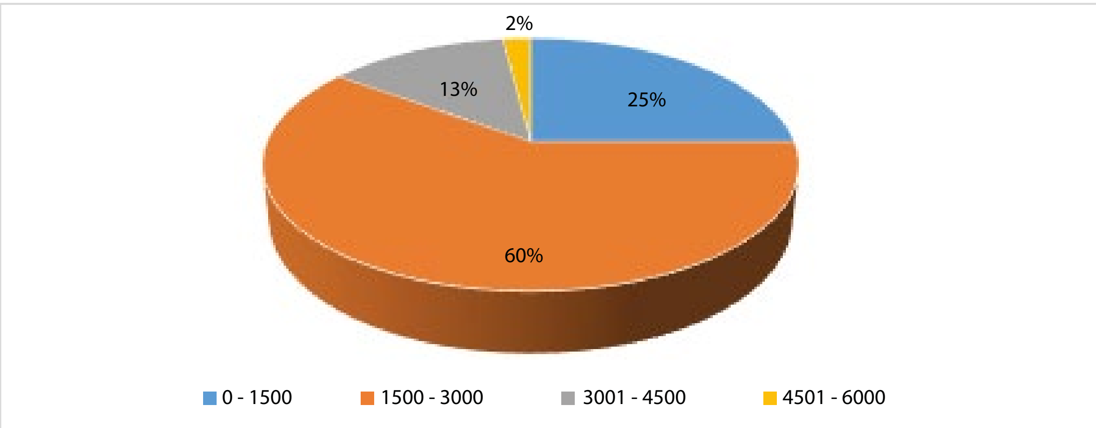



*Figure 50: Amount of money spent per month on internet/digital platforms*

The findings on the amount spent when looked at together with the findings in this study that shows 88% of the millennials and Gen Zs mentioned that they use data bundles suggest that the bulk of the amount spent is probably on data bundles and not necessarily on content. The current subscription cost for one of the established media houses in Kenya (Standard Media Group Digital) is KES 300 per month, while daily is KES 10, weekly KES 245 and annually KES 3,600. For Daily Nation as of January 2021 when the publisher had a subscription model, the cost was KES 50 per week, KES 150 for one month, and KES 750 for one year. These rates when looked at against the backdrop of what millennials and Gen Zs spend, even though a good percentage of their spending goes to bundles, suggest that media houses can tap on their spending with competitive bouquet of content offerings that youth can afford. Previous studies have established that an average youth does not need all the content in a newspaper or in a digital news platforms; and some of the recommendations made include having models that allows consumers to pay for what they choose to consume, to be afforded flexible payment models with more flexibility and most importantly, to offer an aggregator or app that provides an array of content that they can choose from and pay.[i]

### 3.6.7 Number of Posts on Digital Platforms

The youth engage on different social media platforms by posting comments and sharing opinions. Findings from the digital tracking show that a majority of the millennials and Gen Zs who were tracked (70%) post comments on social media 1-5 times a day. It does seem that most of the millennials and Gen Zs online are more of consumers of content and not necessarily engaged in too much of posting of content. The findings show that only 2% post comments or content 11 times or more in a day and 13% between six to 10 times. The findings further indicate that 15% do not even post content daily but post several times a week as shown in the figure 52 below.

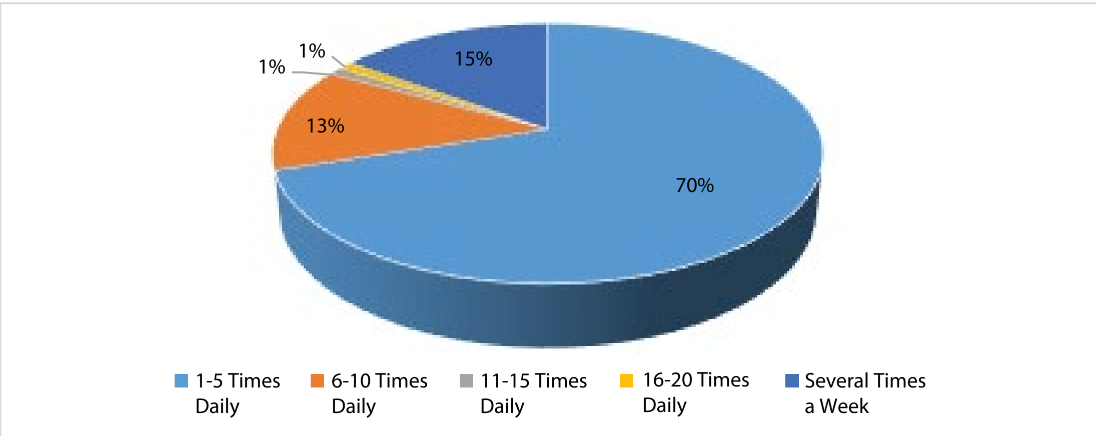



*Figure 51: The Number of Post on Social Media*

# 4.0

# CONCLUSION

1. Millennials and Gen Zs in Kenya are motivated to consume the news and media content they want by the desire to gain awareness of current affairs, acquire knowledge on different topics that are of interest to them and attainment of personal goals in life. The need for self-preservation and the desire to escape from the limits of societal expectations and stereotypes also drive millennials and Gen Zs to consume the content they do. The media's understanding of these motivations as a basis for laying strategies of gratifying these motivations is key if the media is to tap on this significant demographic in Kenya.

2. Even though these millennials did not rank entertainment as a top motivation for news consumption, generally their response appears to suggest that they prefer that any content including news and current affairs content to be entertaining. Suggested in these findings is the fact that news media organisations to tap on this demographic they need to make the significant issues they cover relevant and attractive by not only giving these issues an entertaining angle, but by infusing a user added value that would help these millennials and Gen Zs see the potential of usage in the content. Attractive for this demographic is content they can interact with, get involved with as co-creators and content that they perceive to have potential for usage.

3. Most of millennials and Gen Zs are fairly purpose driven in their choices including media consumption and they know what they want. The findings indicate that this demographic believes that they have finally discovered who they really are, completed their education, become spiritually mature, started a career and gained financial independence. There are suggestions then, in these findings, that their media consumption habits are a lot more grounded on who they are and what they want, an understanding that the media needs to be alive to if the media programming menu is to speak to this demographic. Nevertheless, only a few of them have bought a home and become influential/famous. In terms of needs, the youth require information that addresses their need for making money, saving money, becoming financially independent, and satisfying needs of family/friends.

4. Entertainment news, especially celebrity news, profiles and gossip are popular with

the youth, but they also predominantly consume general current affairs, political news content. The high consumption of current affairs content and political news and the fact that slightly more respondents indicated that they have paid for political and current affairs content compared to those who indicated paying for entertainment, coupled with the finding that the trend in payment for content indicates a relatively high number of consumers who have paid for content in the last 12 months suggest that the media can leverage these trends and target this demographic with tailored content that can attract more consumers willing to pay. These findings also suggest that the media can balance between entertainment content that is for free and current affairs content that addresses the desires of these millennials and helps them meet their goals, but for a fee.

5. The key factors that millennials and Gen Zs consider when subscribing or paying to receive /access news media content include how interesting the content is, affordability, relevance, attractiveness and availability/reliability. On the other hand, the key factor that influences the choice of platform on which they consume content is the subject/headline of the story, peers, close friends/family, and journalists who have written the story.
6. Legacy media platforms are the preferred platforms for news consumption and millennials and Gen Zs enjoy consuming news on these platforms. Television, social media and radio are the top three trusted platforms. The least trusted media platforms are digital native platforms and personal news blogs.
7. The main social media platforms relied on by the millennials and Gen Zs in Kenya are Facebook, WhatsApp and YouTube. Other key social media platforms that are subscribed to by the youth are Twitter, Instagram, TikTok and Telegram.
8. The most attractive content to millennials and Gen Zs are the content that focuses on youth empowerment, education and entertainment and advertisement of job opportunities. These millennials discriminate TV, radio and newspapers brands they consume based on the extent to which the brands focus on these content areas.
9. Mobile phones are the most frequently used devices to consume news and media content. Other devices that are relied on by a significant proportion of the millennials and Gen Zs are TV and radio. Contrastingly, the least used devices include computer/laptops, newspapers, and tablets.
10. Mainstream/legacy media platforms like TV, radio and newspapers and digital and social media platforms seem to complement each other as sources of news and media content for millennials and Gen Zs. Even where social media is the first point of contact with news, most millennials and Gen Zs would still follow news alerts, notifications, and pop ups from these social media platforms to legacy media platforms for more information and context. Such consumption habits seem to buttress the need for legacy media houses to consider producing news and media content in formats that are native to these demographics preferred spaces and platforms for news consumption.

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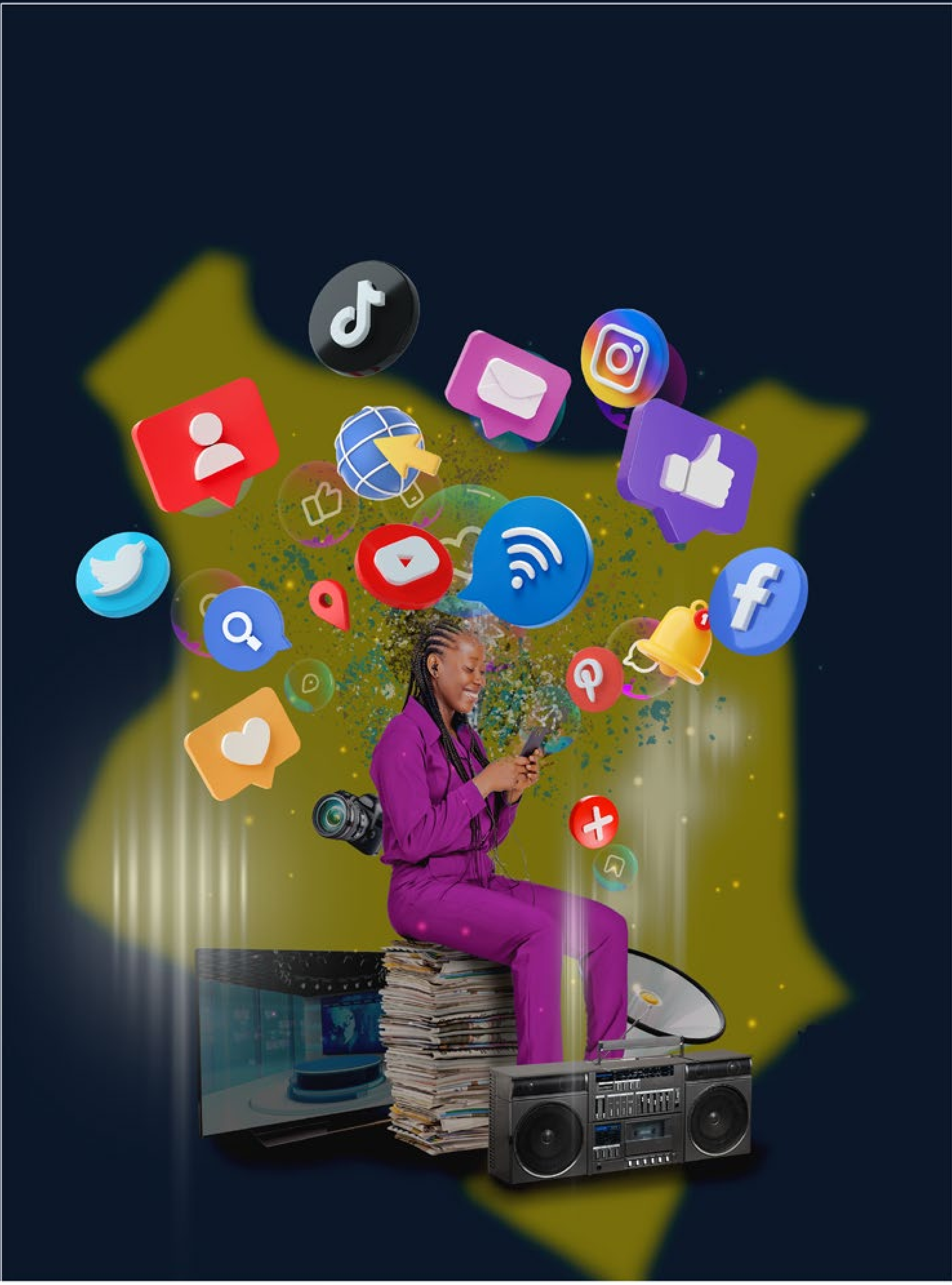

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