# MEDIA CONSUMPTION IN AN EVOLVING DIGITAL WORLD:

## MILLENNIALS AND DIGITAL NATIVES' CONSUMPTION HABITS AND IMPLICATIONS FOR LEGACY MEDIA IN EAST AFRICA

Media Innovation Centre

Media Futures EA

THE AGA KHAN UNIVERSITY
*Graduate School of Media and Communications*

infotrak Research & Consulting

# Key Facts


**No. of respondents/Participants**

Kenya - 1201 Respondents

Eight FGDs

Digital Tracking - 150

**Data Collection Method**

Survey Questionnaire - (CATI)

Focus Group Discussions

Digital Tracking

**Data Collection Period**

May to July 2022

**Method of Analysis**

Statistical Analysis (SPSS)

# Definitions


**Generation Z (Gen Z)**
In the current study - 18-24


**Millennials**
Current study categorised 25 - 35 year-olds as millennials

**Digital native news sites/organisations**
News producing media organisations that were founded on the digital platform and only exists on the digital platforms.

# Report focuses on five thematic areas

1. Identity of Millennials and Gen Zs in East Africans

2. Nature of content millennials and Gen Zs consume

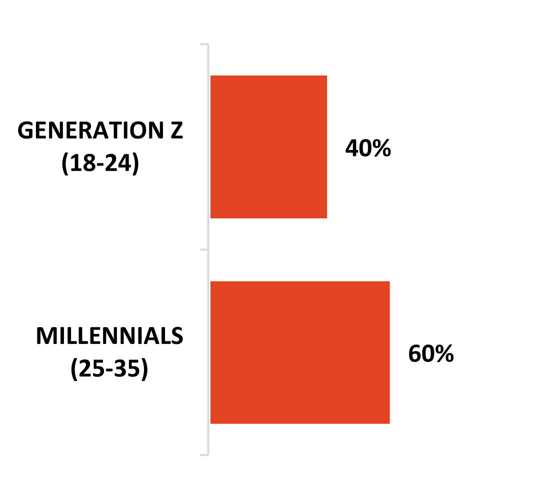
3. Media habits and behaviour of millennials and Gen Zs

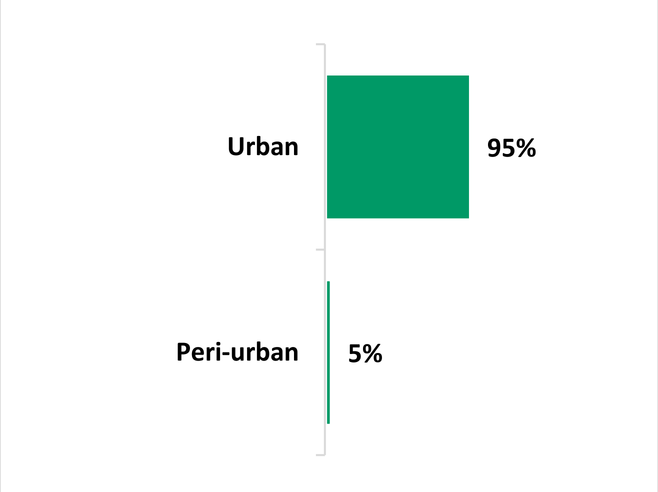
4. Platforms relied on to consume media content

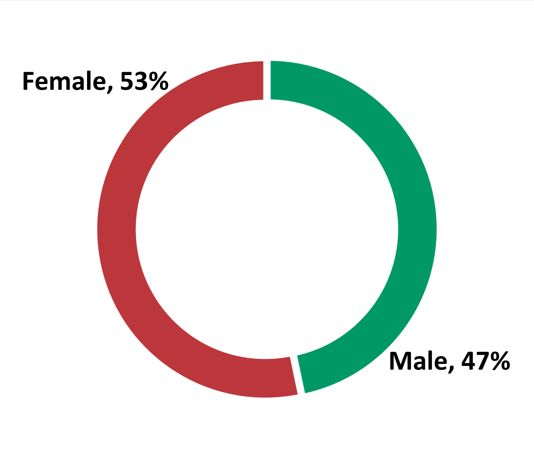
5. Perception of legacy media

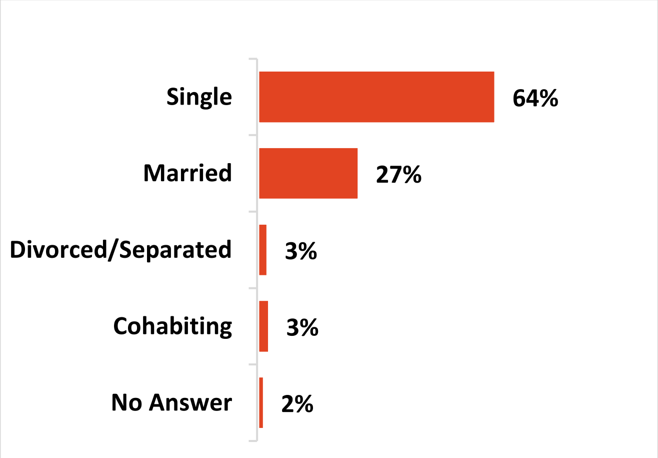
# IDENTITY OF MILLENNIALS & GEN Zs

# The Current Study Targeted Urban Millennials and Gen Zs



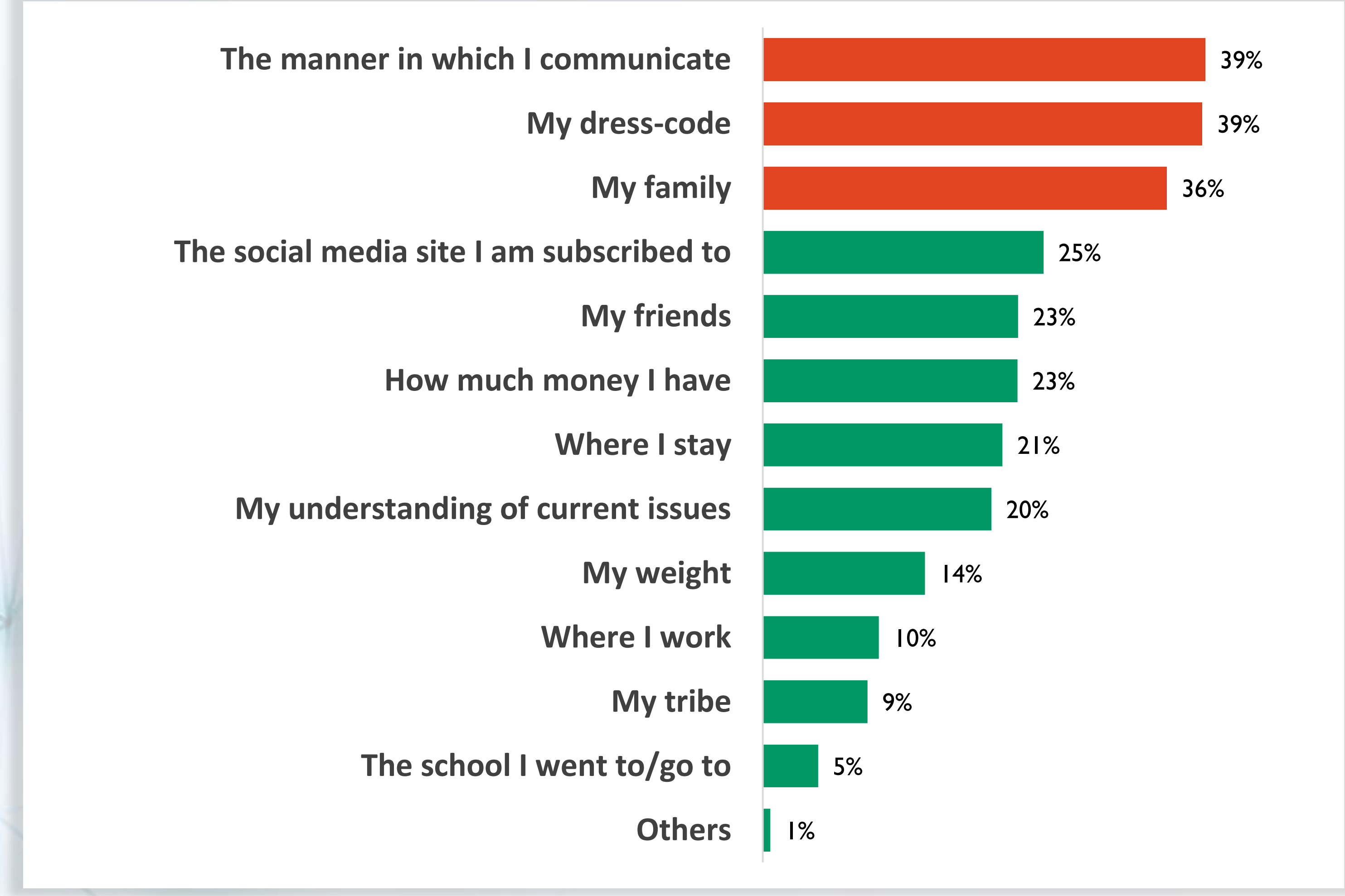




- Some 56% indicated that they had attained either college (35%) or university/post-graduate (21%) education.
- Completed secondary education – 38%
- Employed – 66%
  - Employed in the formal sector - 31%
  - Self-employed in the formal sector - 12%
  - Self-employed in the informal sector – 23%
- Unemployed – 31%
- Urban Millennials and Gen Z's earnings relatively good and the target for advertisers
  - Only 20% earn less than KES 10,000
  - More than half (52%) earn btw. KES 10,001 & 40,000
  - 11% earn KES 40,001 and 70,000
  - 5% earn above KES 70,000 and none earns more than KES 150,000

# What Millennials and Gen Zs are Most Concerned About

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




**However, gaining awareness of current issues/affairs is the top motivation for news consumption**

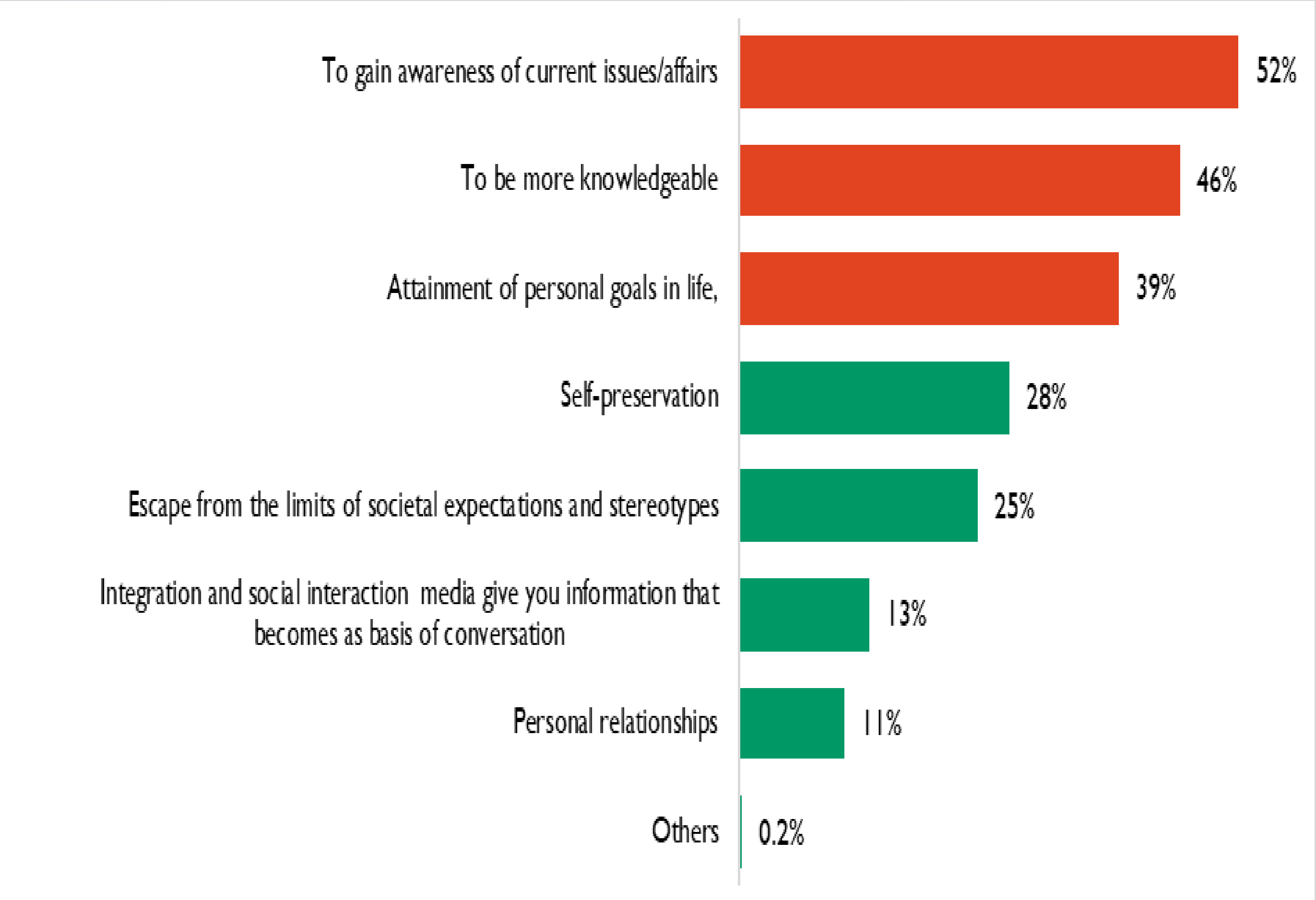
# Accomplishments by the Millennials and Gen Zs

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.

| 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% |

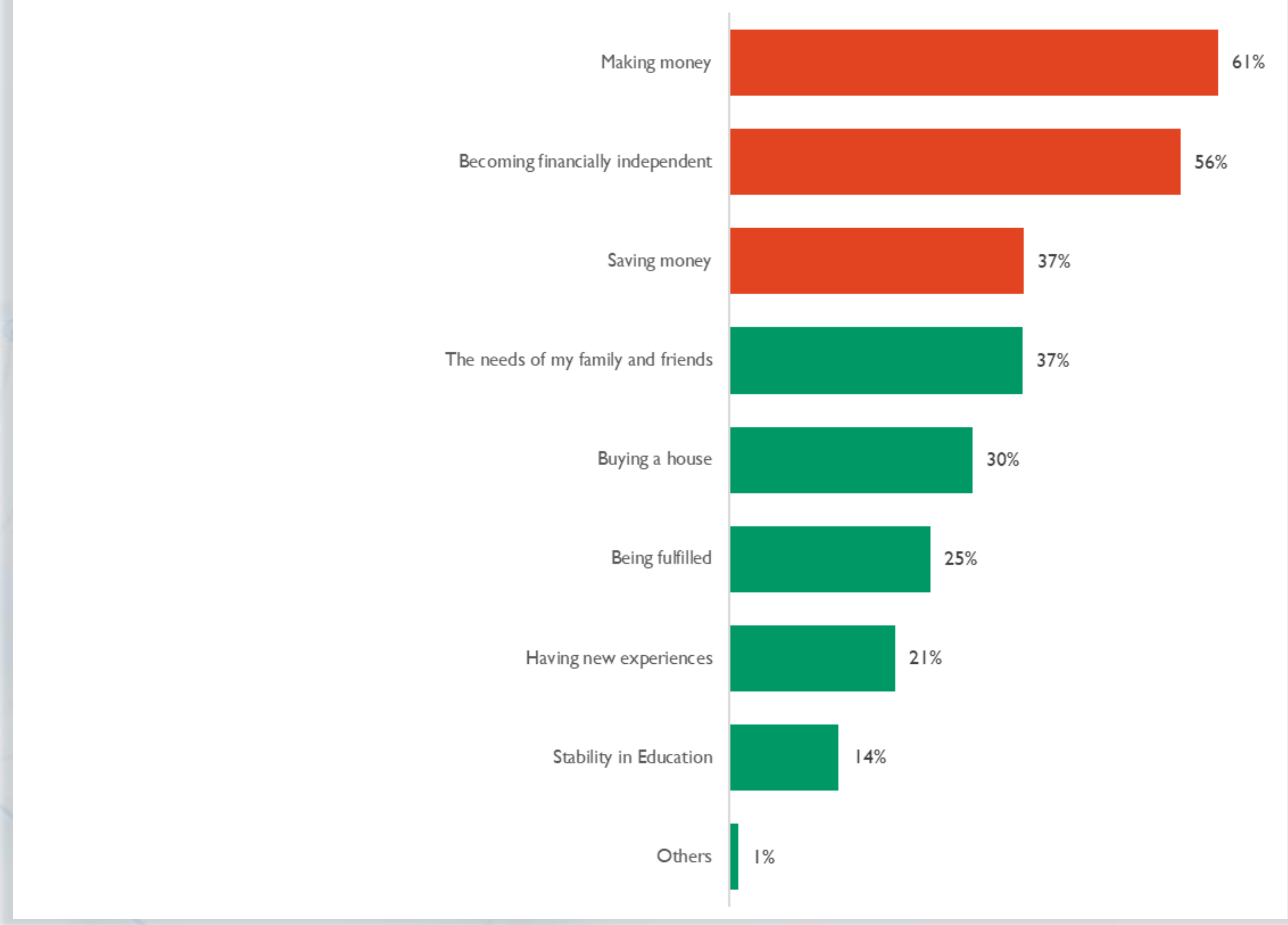
# Motivation to Consume News

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.



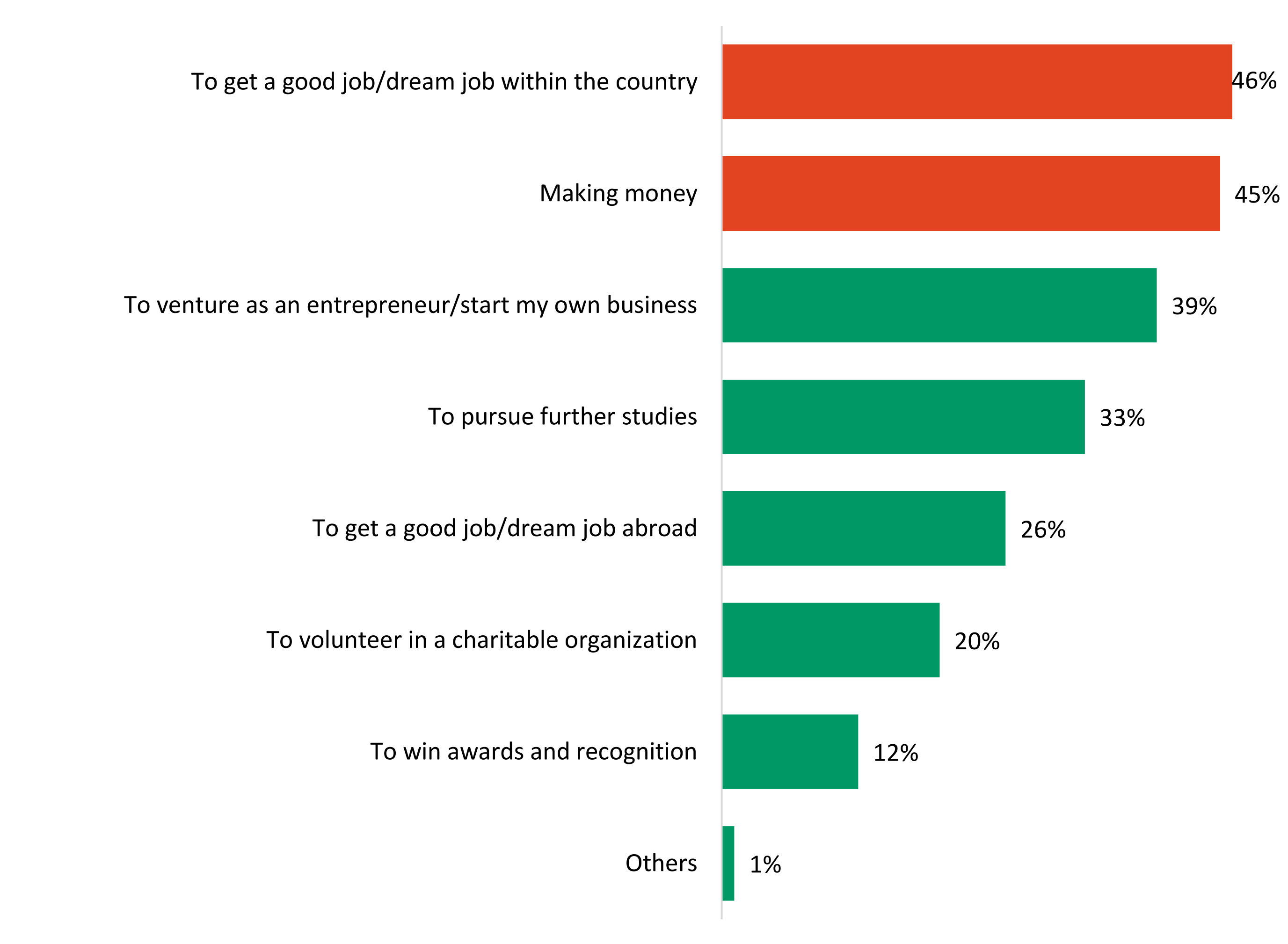
# Issues Millennials and Gen Zs Need The Media to Cover

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 to become financially independent, while 37% would desire content on saving money and the needs of their families and friends.



# Millennials and Gen Zs' Aspirations in Education and Career

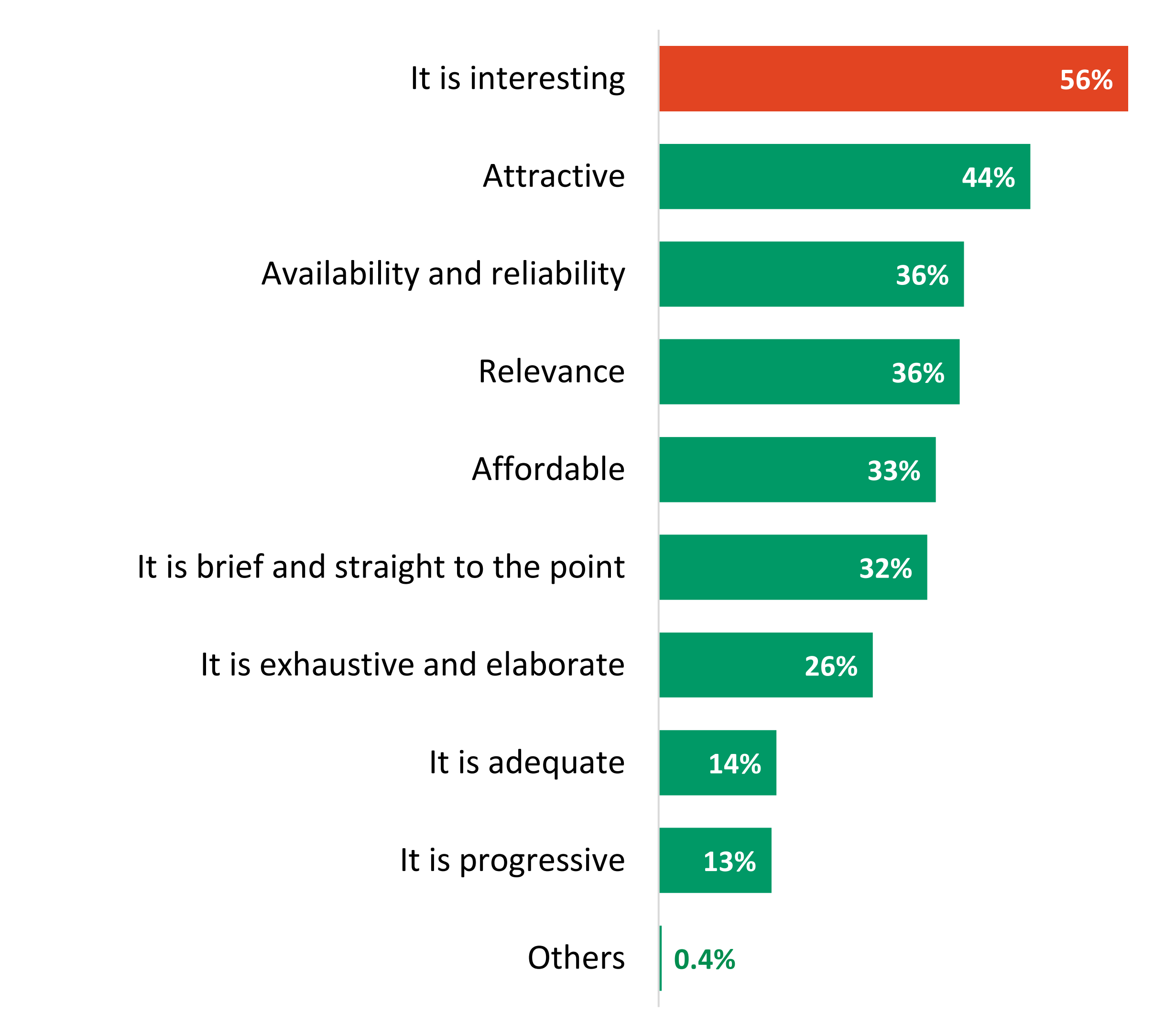
Most of the respondents indicated that their top career aspiration is to get a good job/dream job within the country (46%) and to make money (45%). Others top aspirations include venturing into entrepreneurship/starting own business (39%), pursuing further studies (33%) and getting a good job/dream job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



# NATURE OF CONTENT MILLENNIALS AND GEN Zs CONSUME

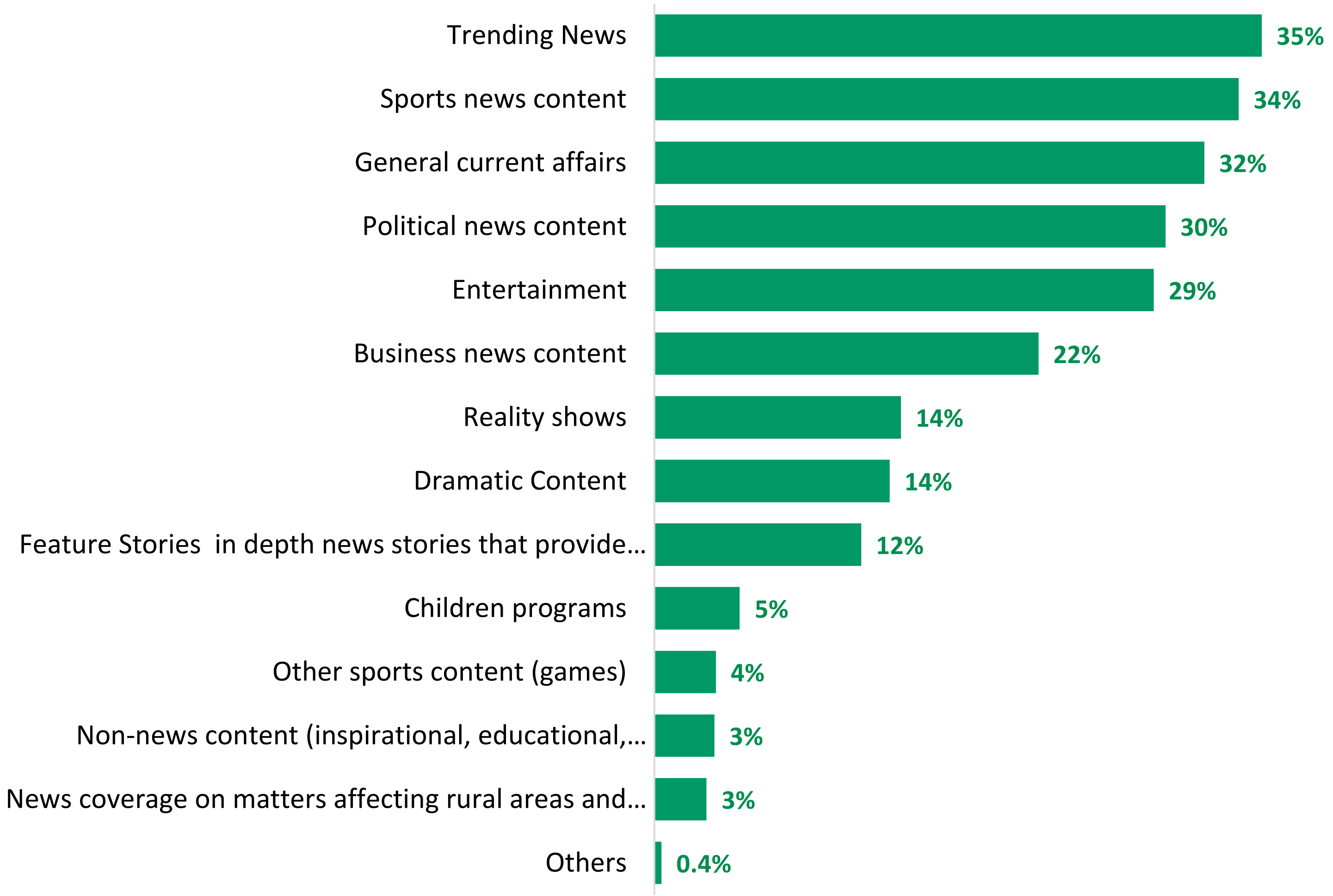
# Major Characteristics of Content Consumed

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.



# Payment for Content

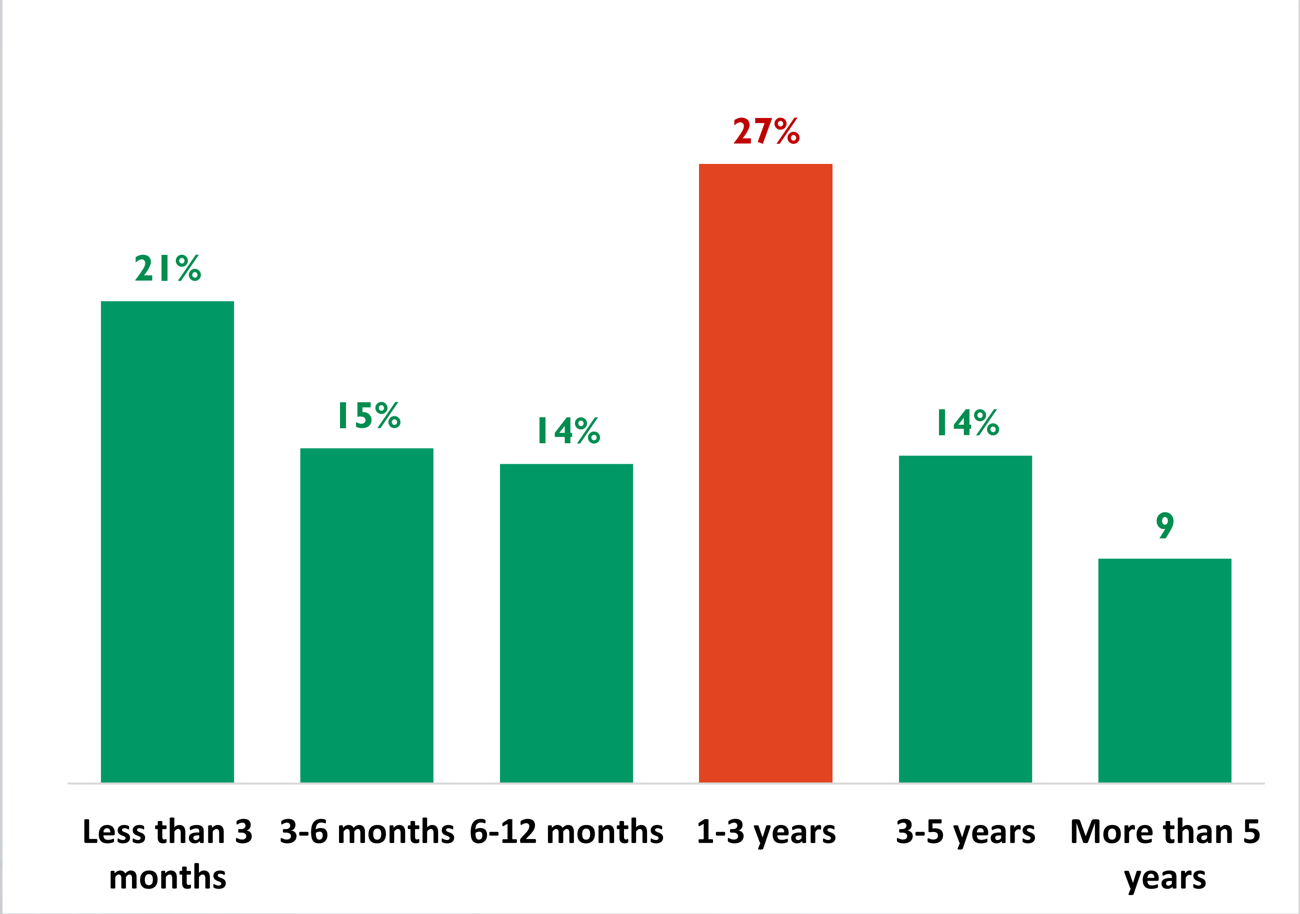
Whereas a majority (52%) of the millennials and Gen Zs have never paid for content, those who have (48%), acknowledge that they paid for/are paying for trending news, sports news content, general current affairs, political news content and entertainment.



# History of Payment for Content

The findings seem to suggest an encouraging trend of recent subscribers to different pay-package models.

50% of the respondents started paying for content in the last one year, with 21% having started paying in the last three months.



# Key Findings on Payment

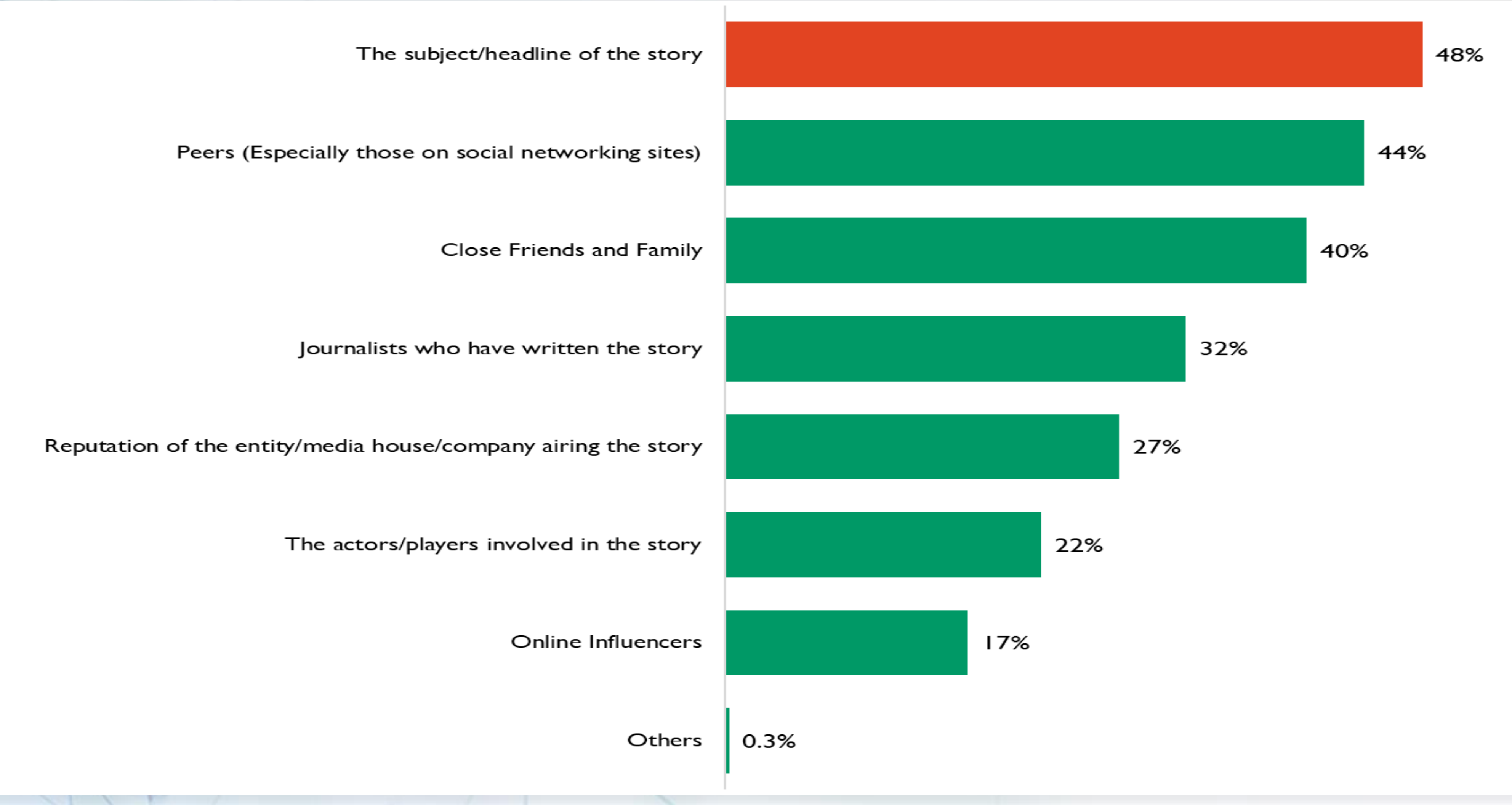
These findings, especially affordability and availability / reliability as factors that motivate millennials and Gen Zs to pay for content are consistent with previous findings on provocations around payments. Studies have established that young people want content they can easily access with reduced 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.

- A significant percentage of the 572 respondents (72%) who pay for content pay between KES 11 and 100 per day
- 60% of the surveyed millennials and Gen Zs spend KES 1501-3000 per month on the internet/digital platforms

The top motivations to subscribe or pay for content include:

1. Affordability,
2. Interesting content,
3. Relevance,
4. Attractiveness and availability and
5. Reliability of content

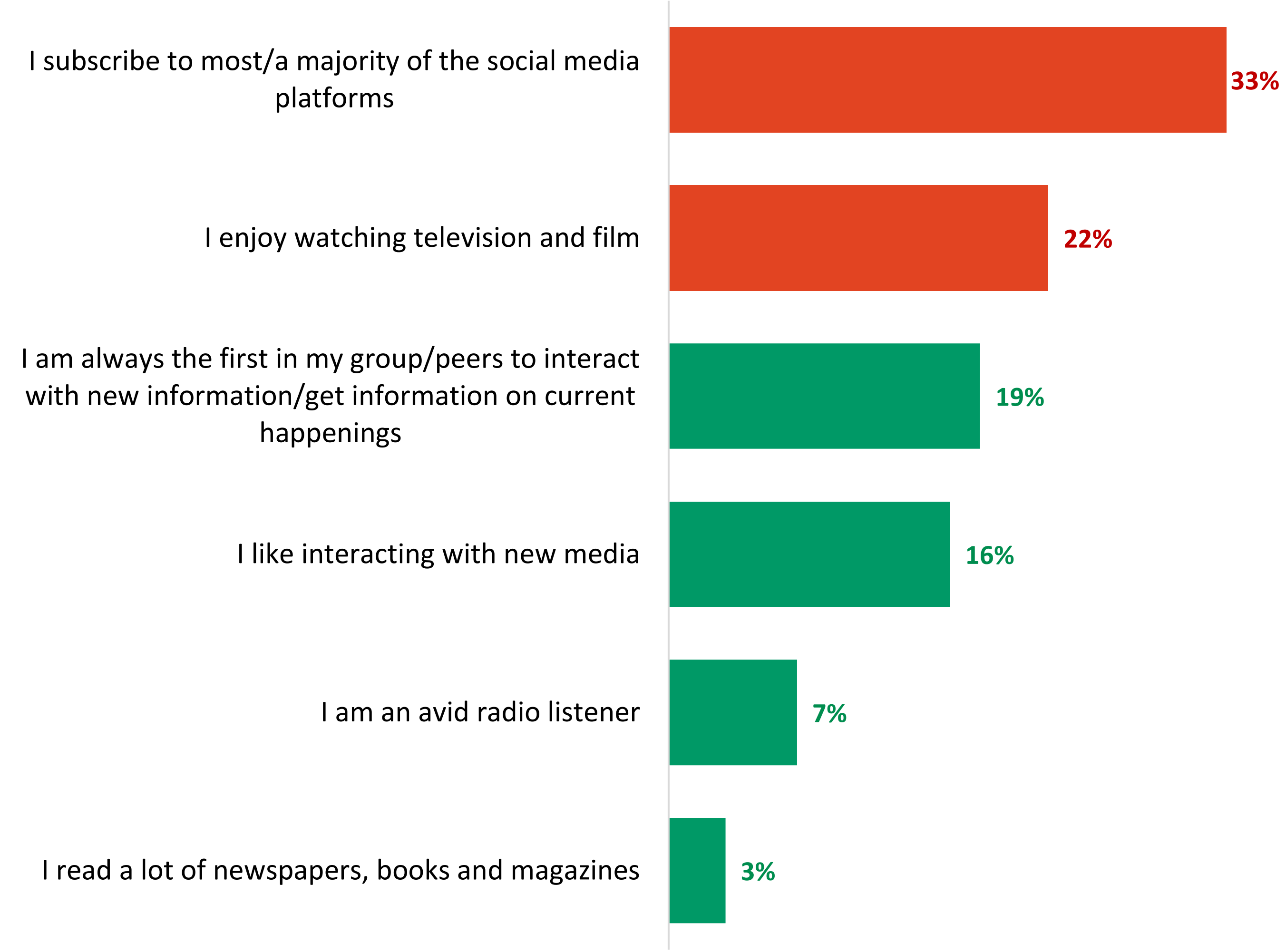
# Factors that Influence the Choice of Media Consumed



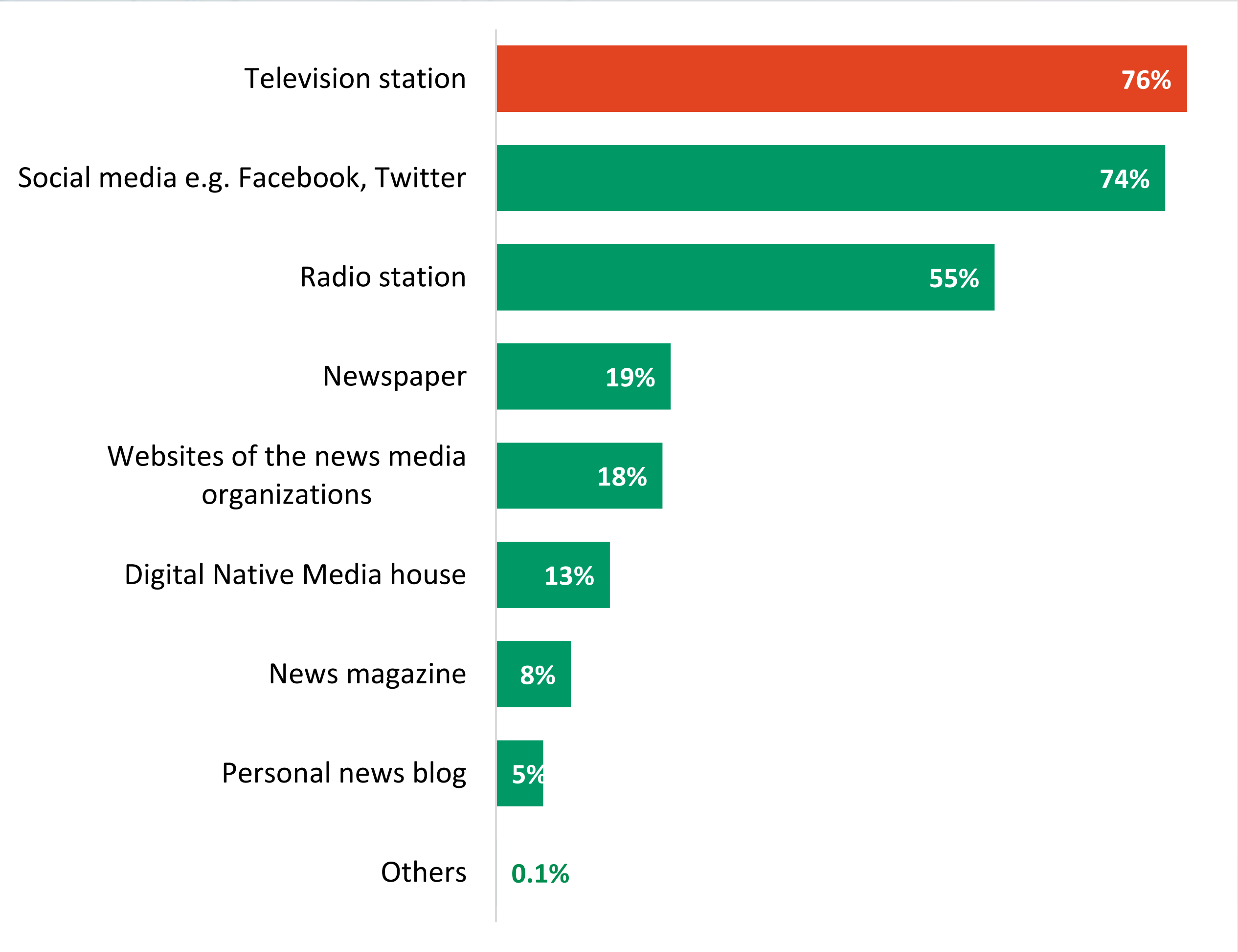
# DESCRIPTION OF MEDIA CONSUMPTION HABITS AND BEHAVIOUR & PLATFORMS RELIED ON FOR MEDIA CONTENT

# 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. 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.



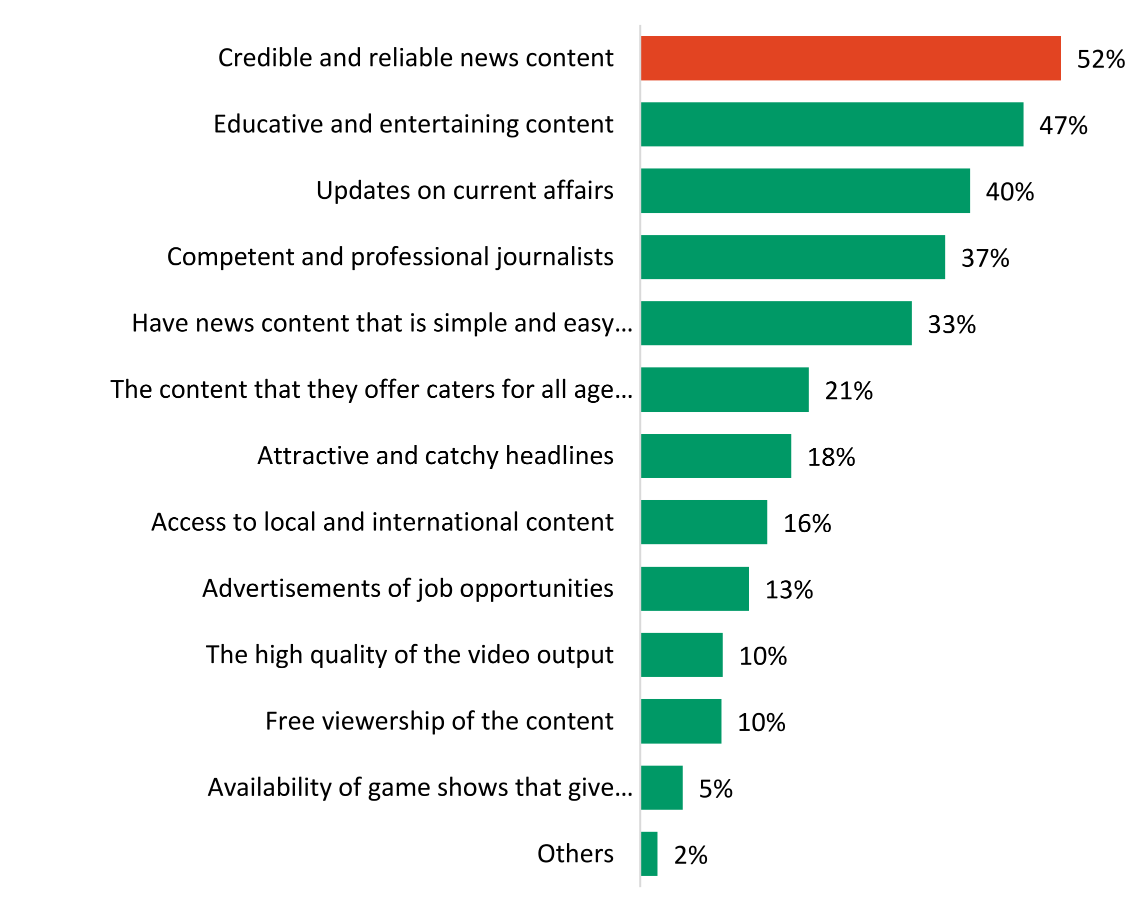
# Media Platforms Relied on for General Information



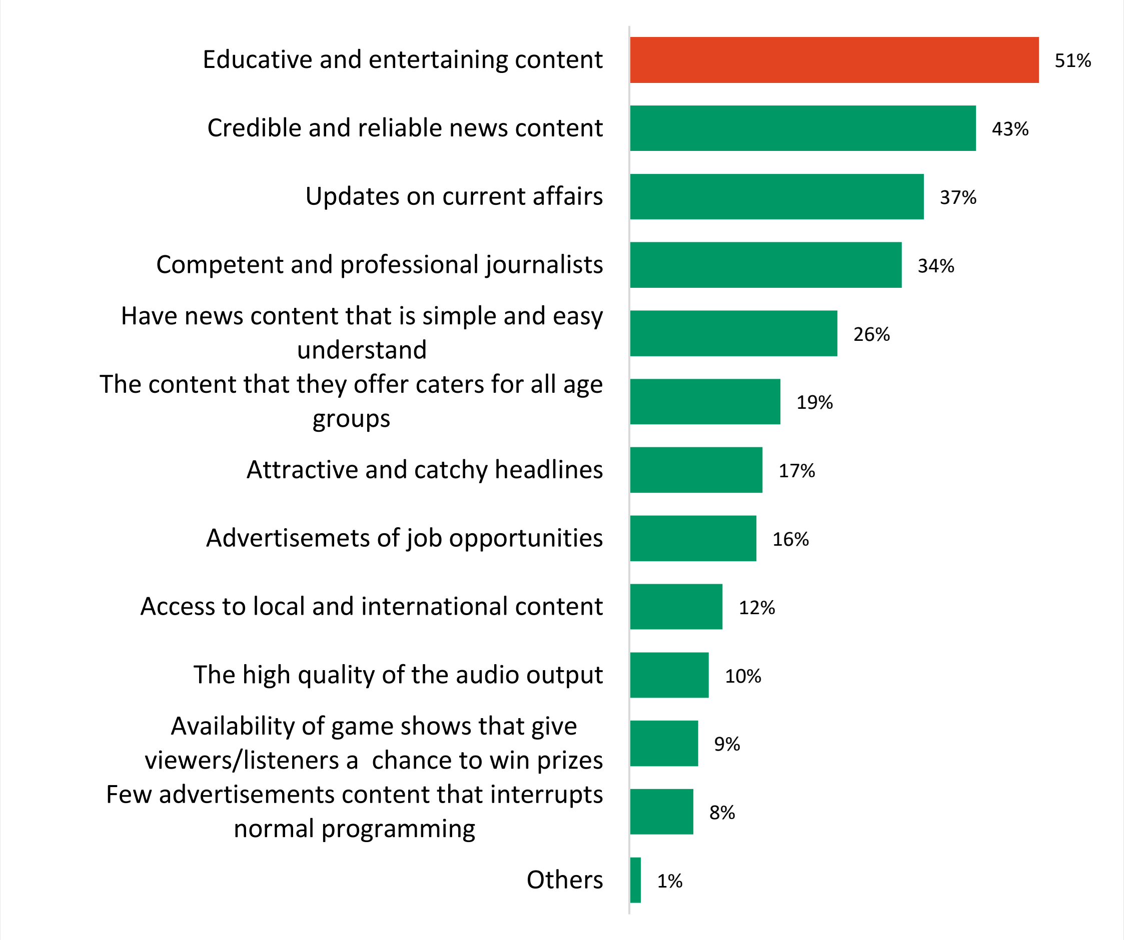

- TV is the top platform relied on for general information, with 76% of the millennials and Gen Zs indicating that they rely on TV stations for general information.
- TV is followed by social media (74%) and radio stations (55%).
- Newspapers (19%), websites of news media organisations (18%) and digital 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.

# Elements that Attract the Millennials and Gen Zs to Offline TV and Radio Brands and Their News

## TV

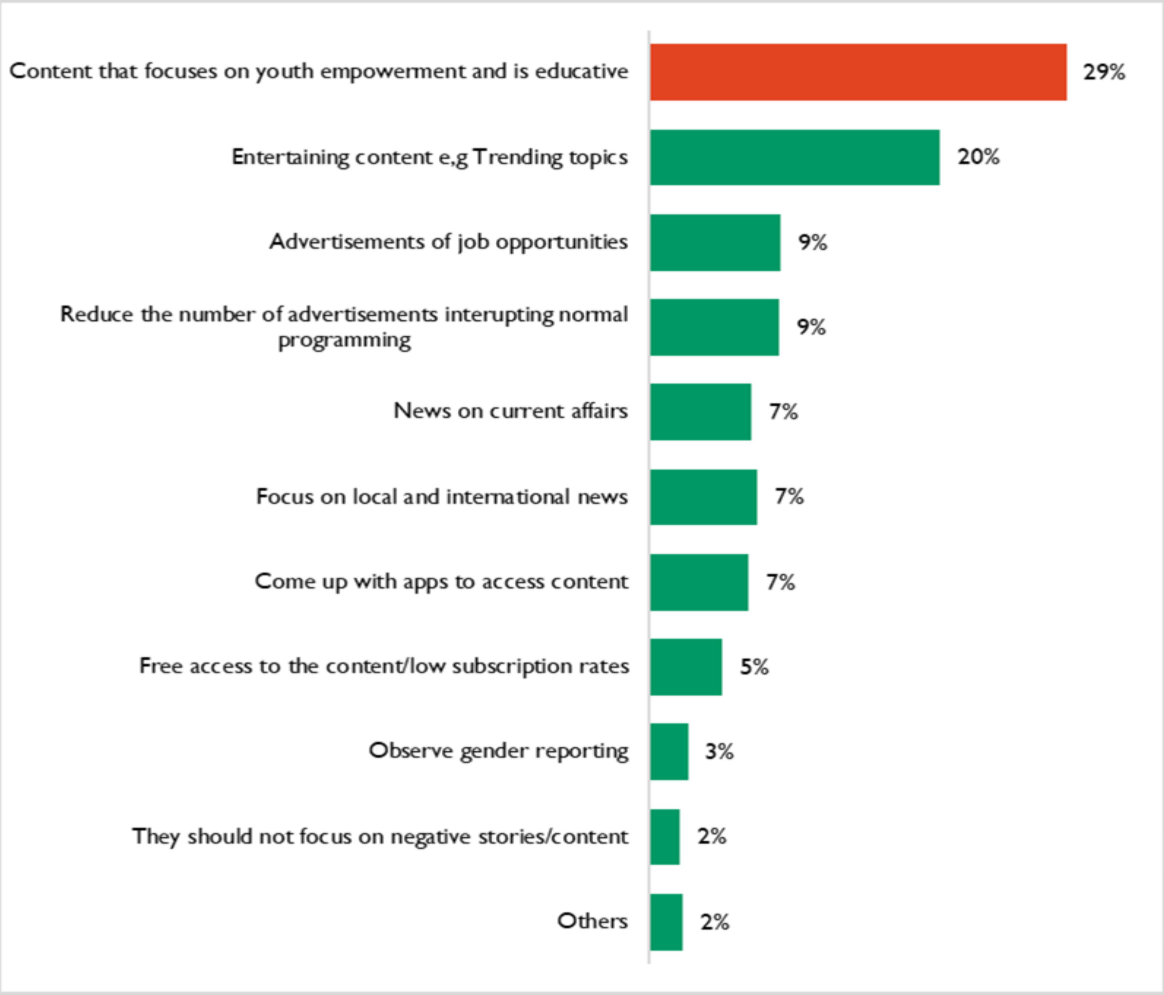



## Radio

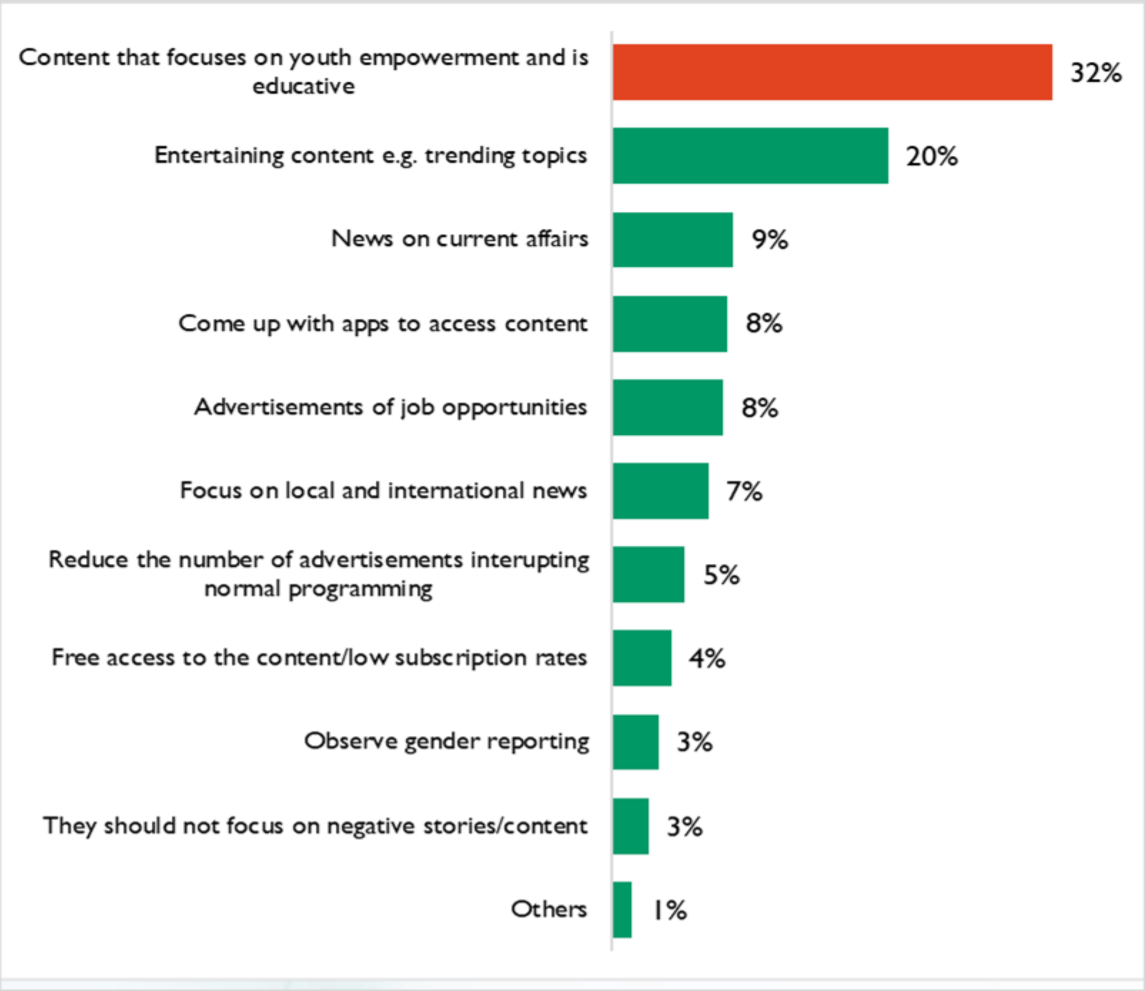


# What TV and Radio Brands Need to Work on to Attract Millennials and Gen Zs

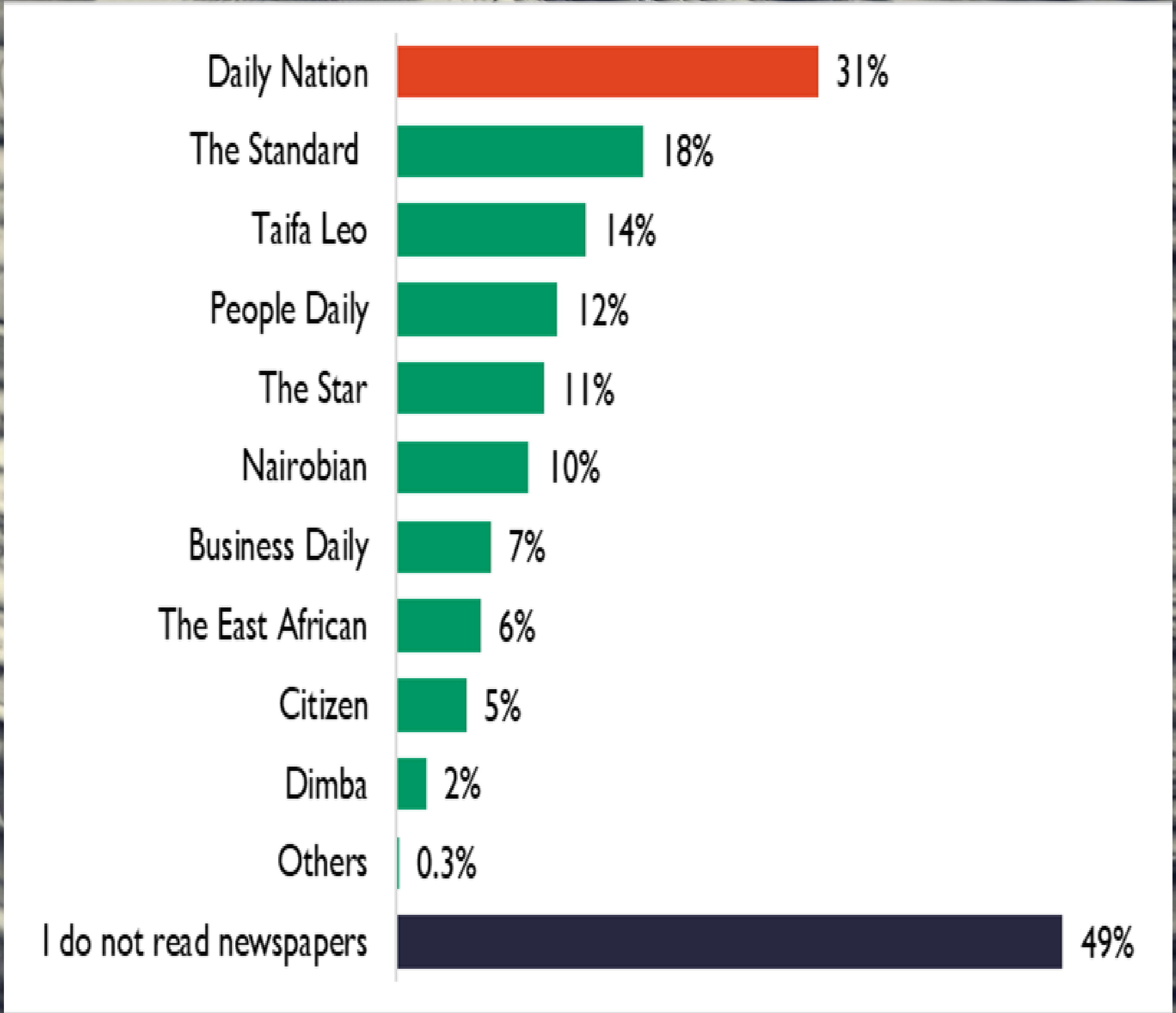
## TV




## Radio



# Newspaper Brands Consumed by the Millennials and Gen Zs



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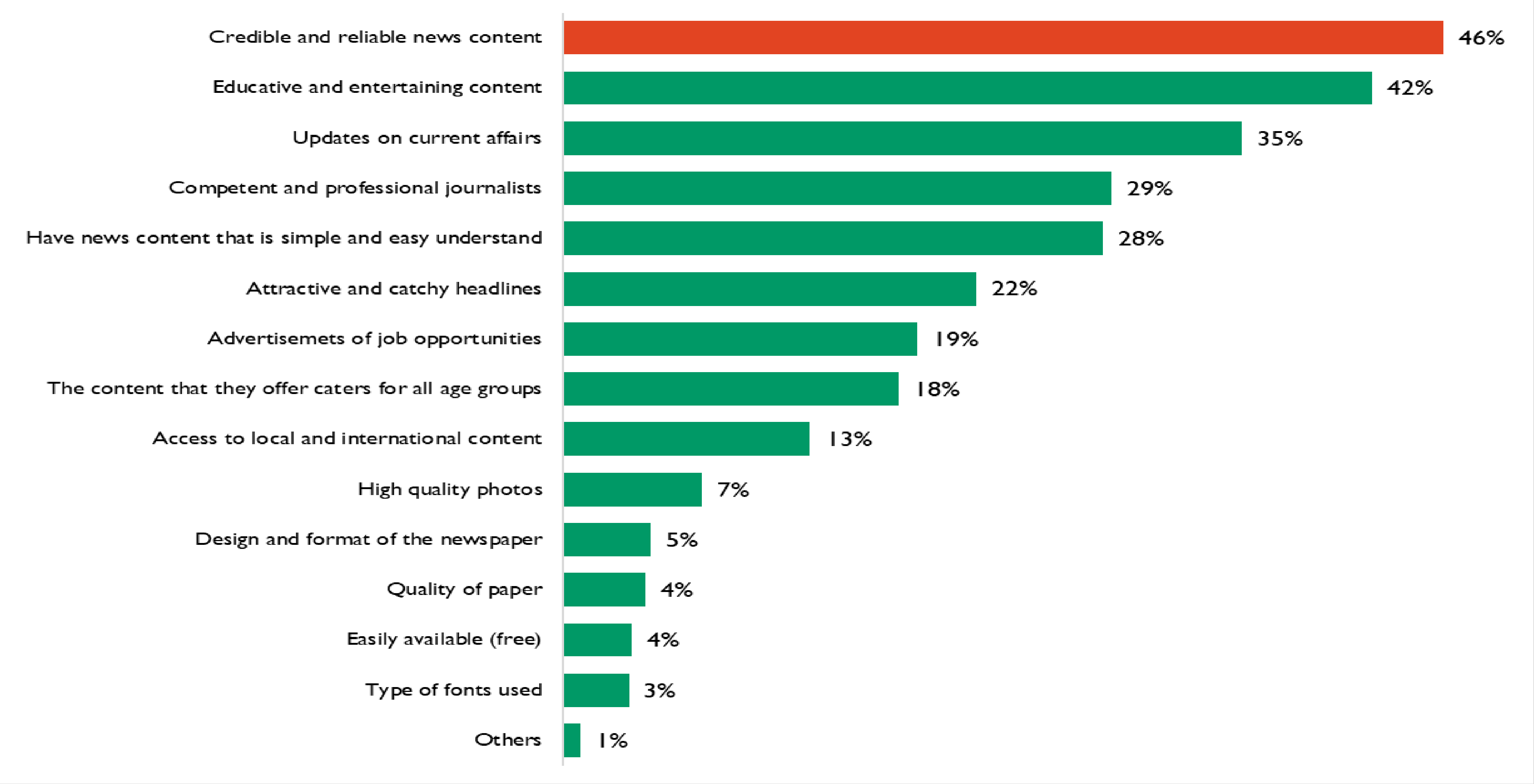

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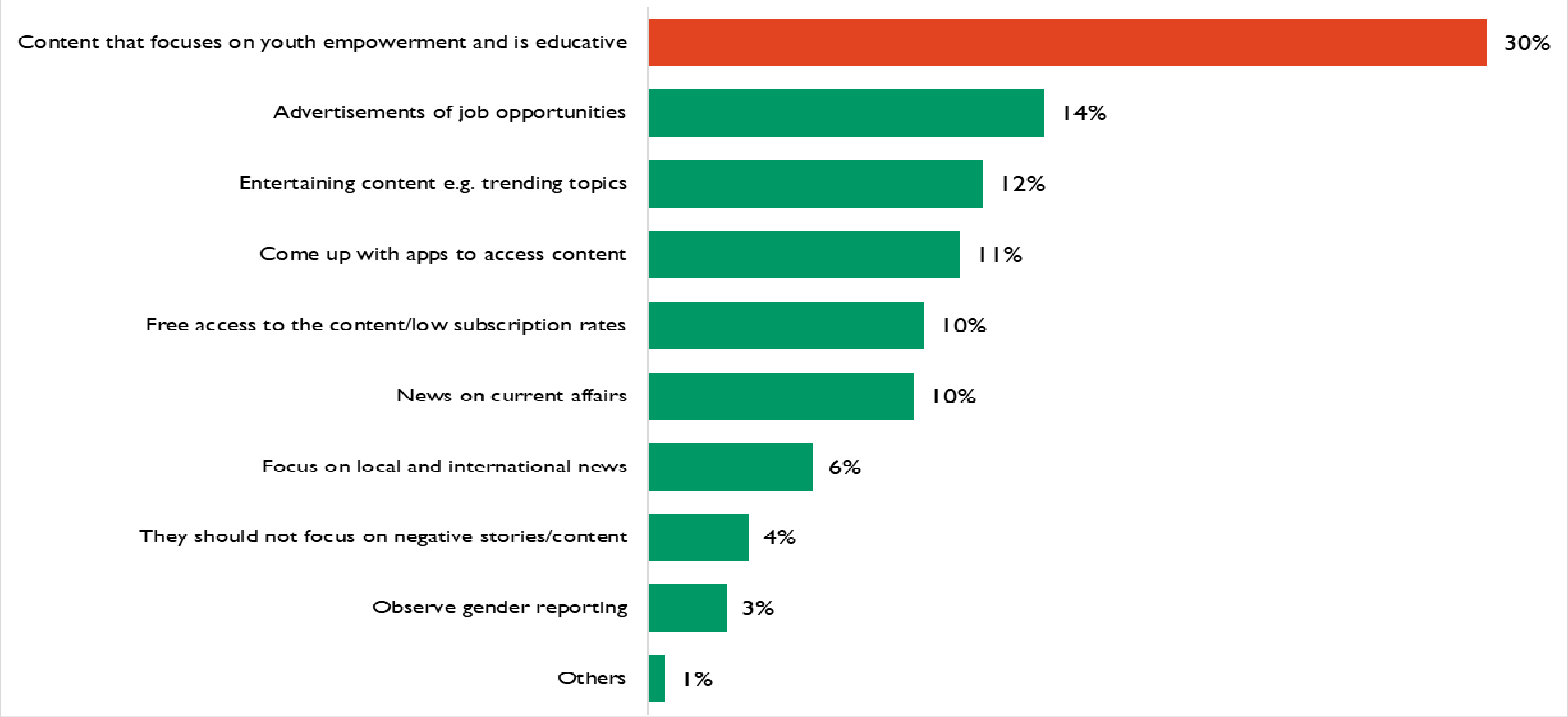
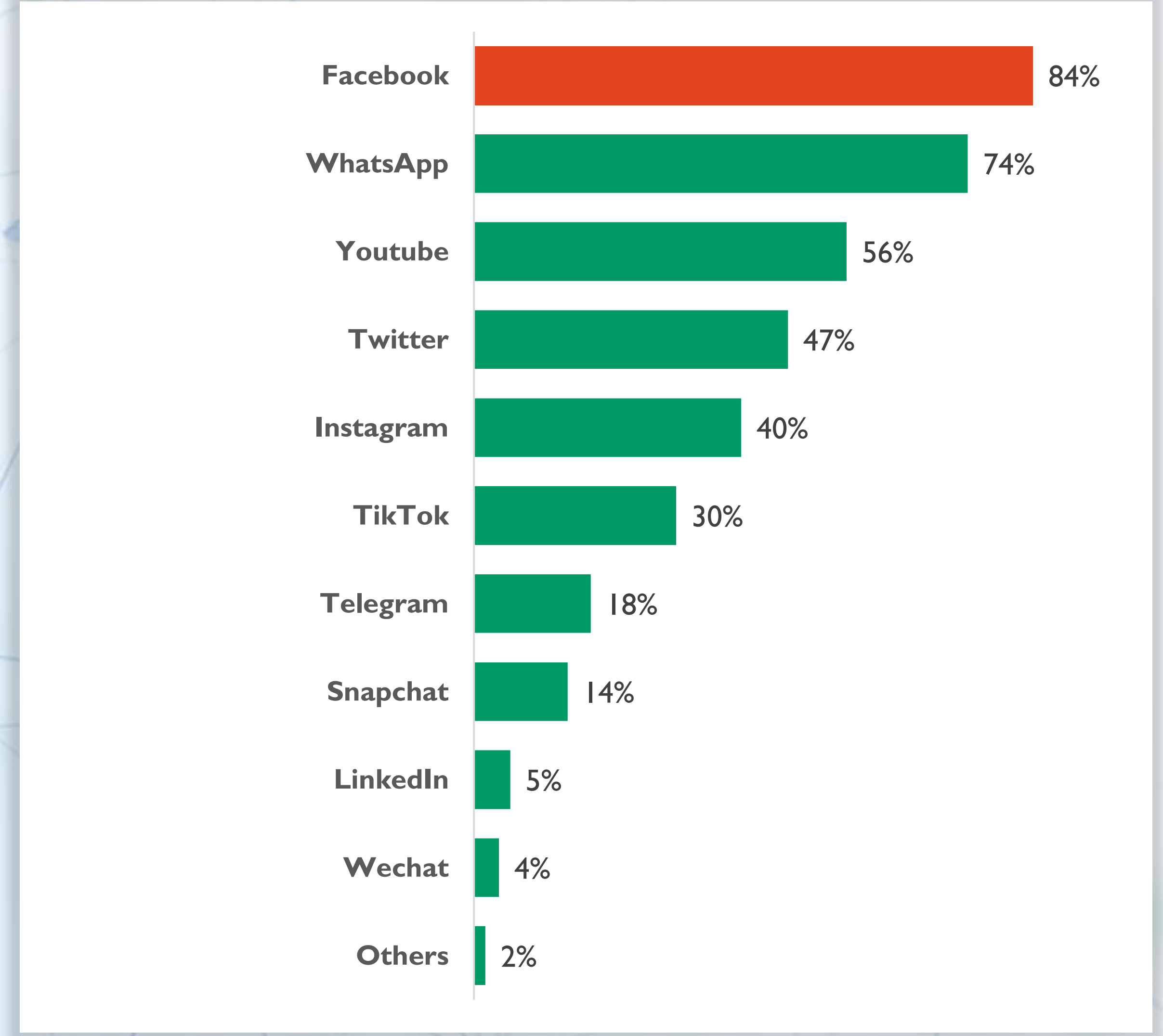
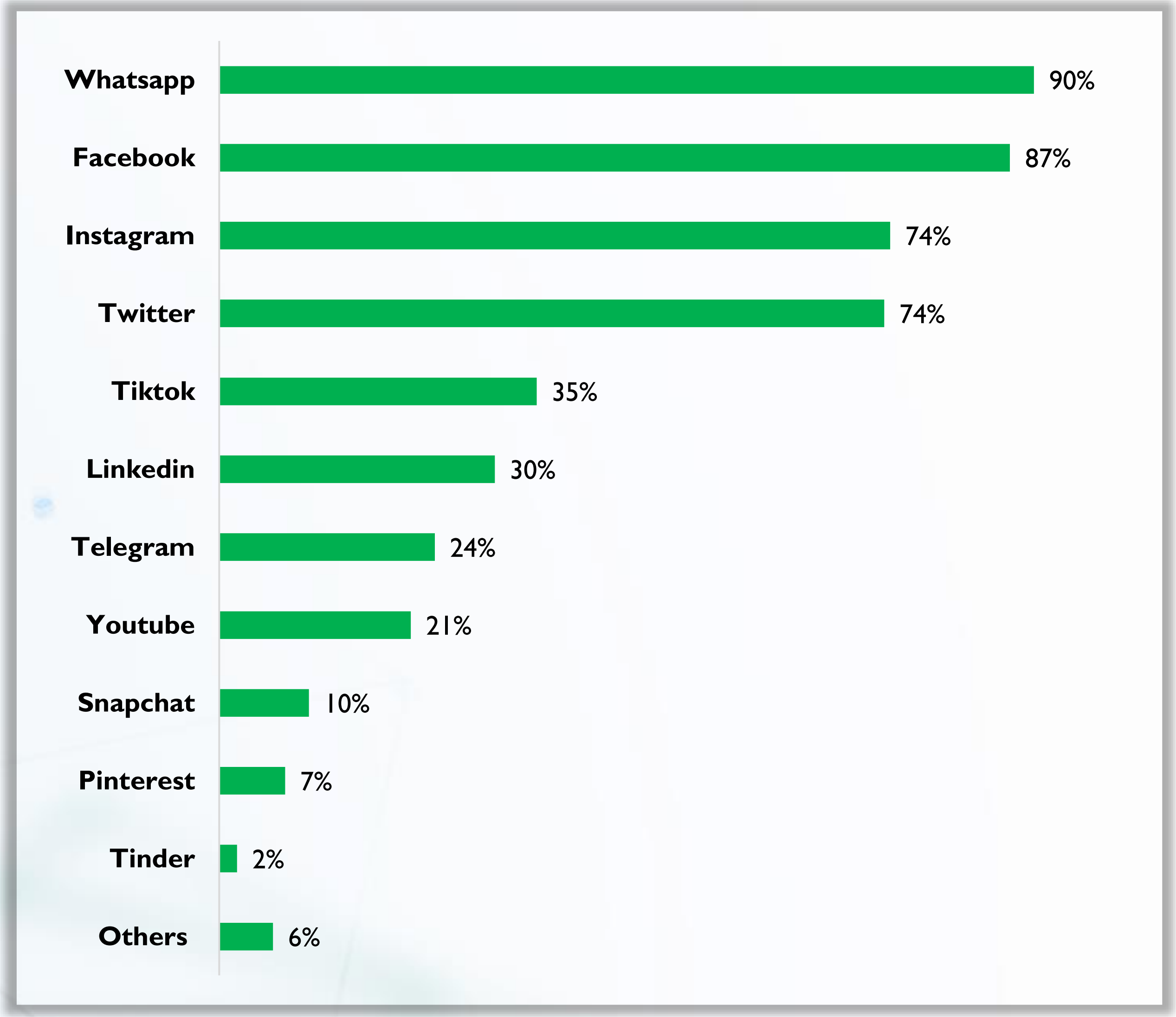


# Social Media Platforms Used

## Survey Response

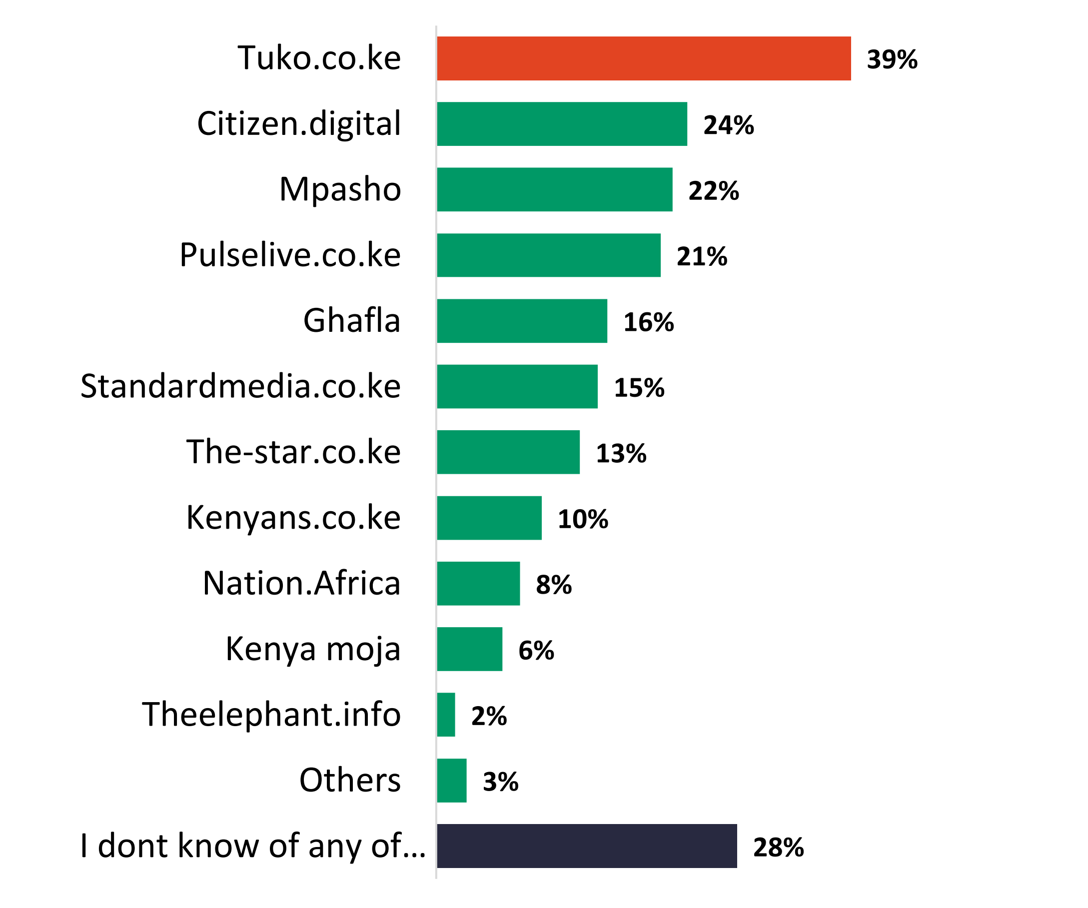



## Digital Tracking

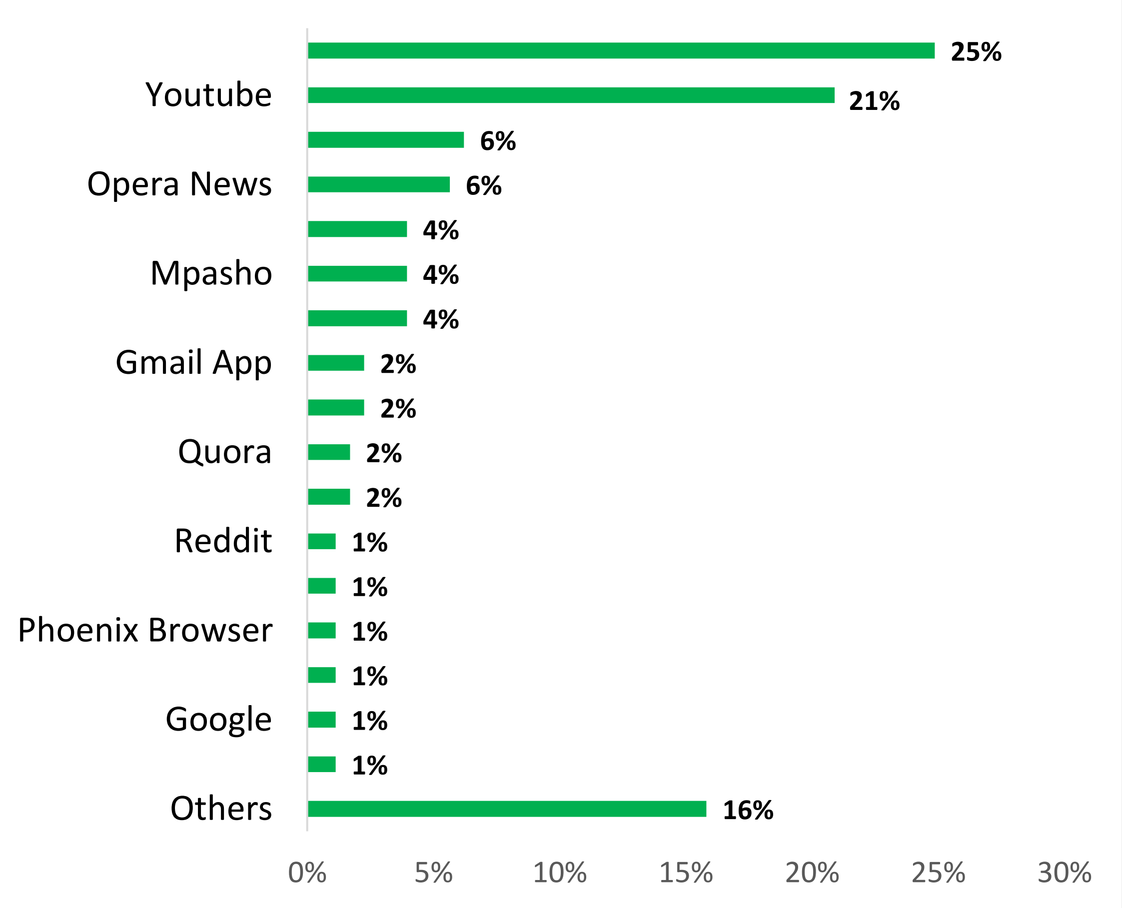


# Digital News Media Sites Consumed by Millennials and Gen Zs

## Survey

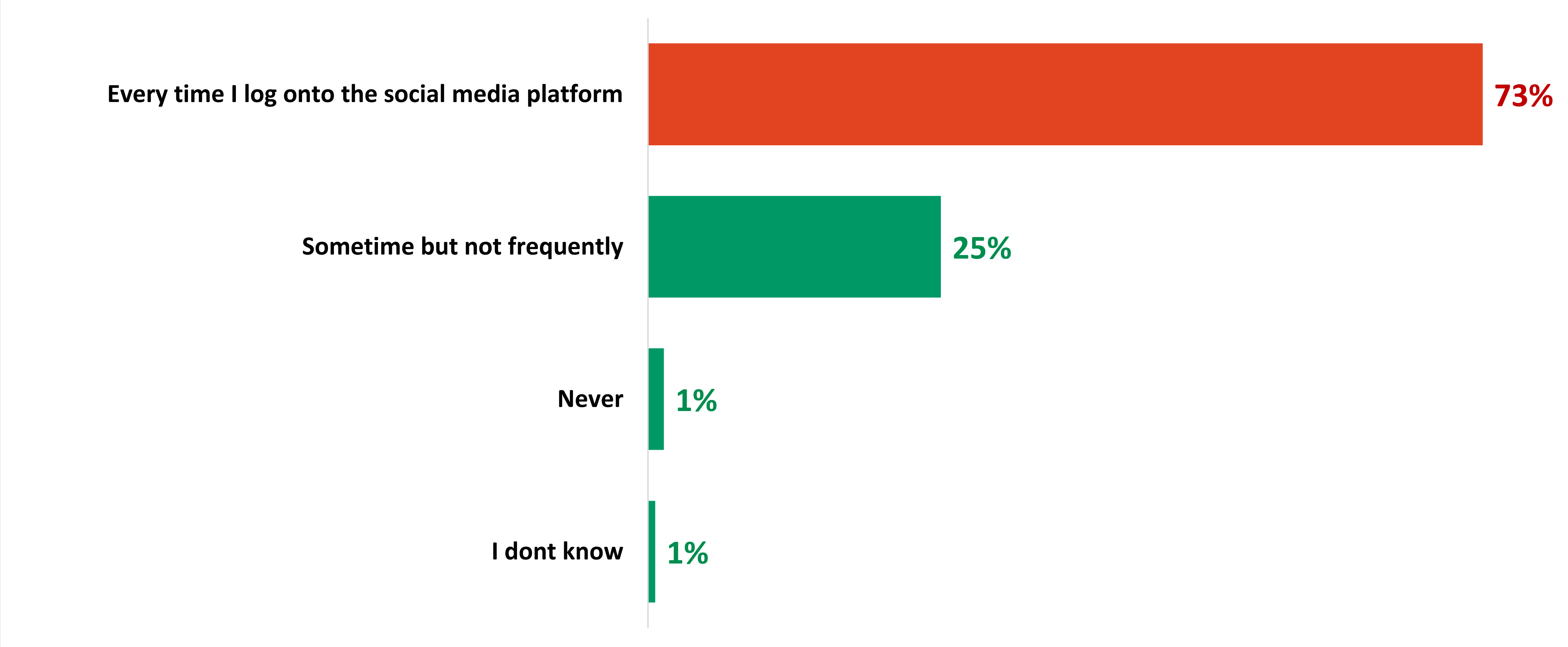



## Digital tracking



# Complementarity of Digital/ Social Media and Legacy Media

## Following Stories on Legacy Media Through Social Media



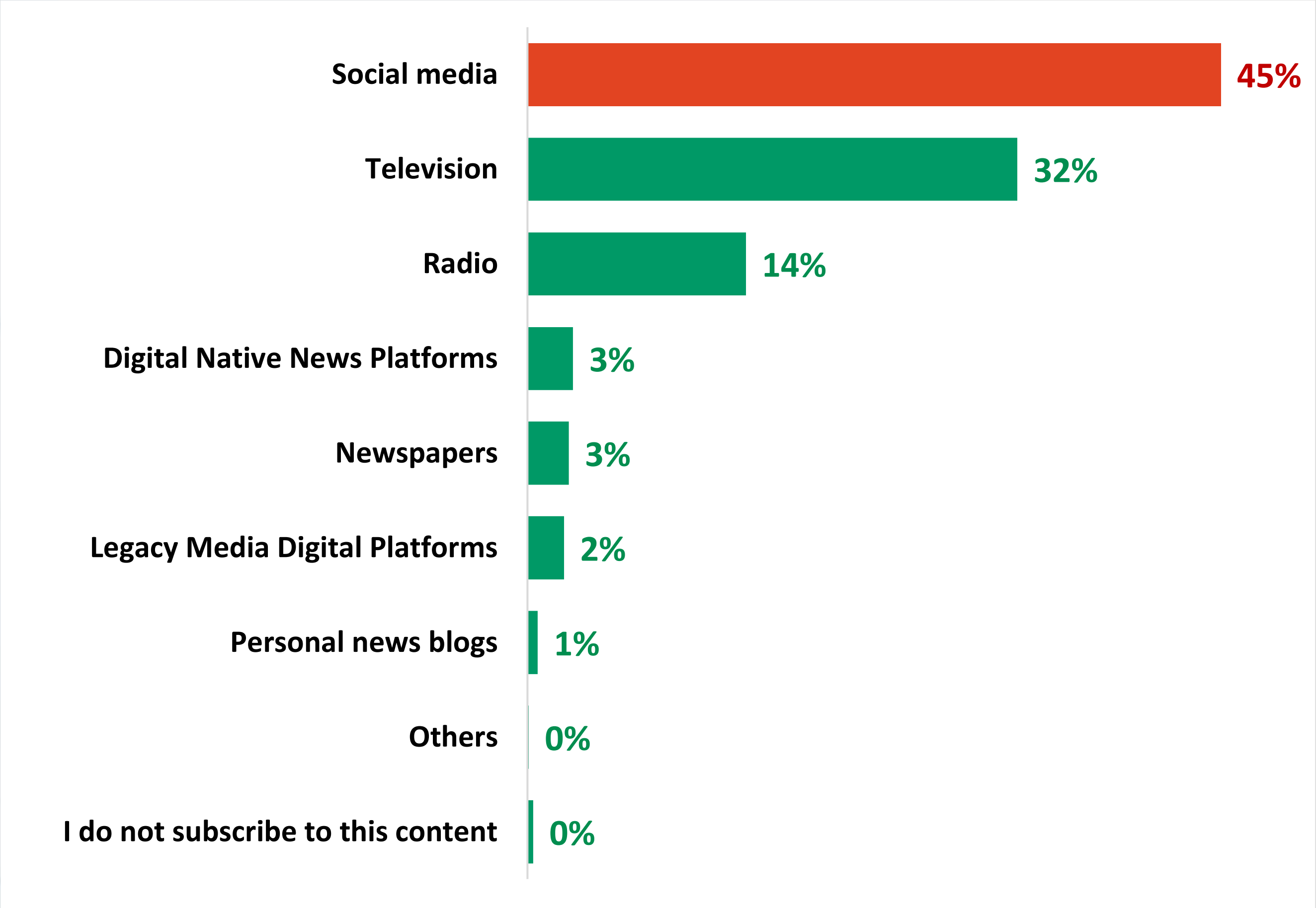
# Top Three Platforms for Accessing Specific Information

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

| | Politics & 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% |

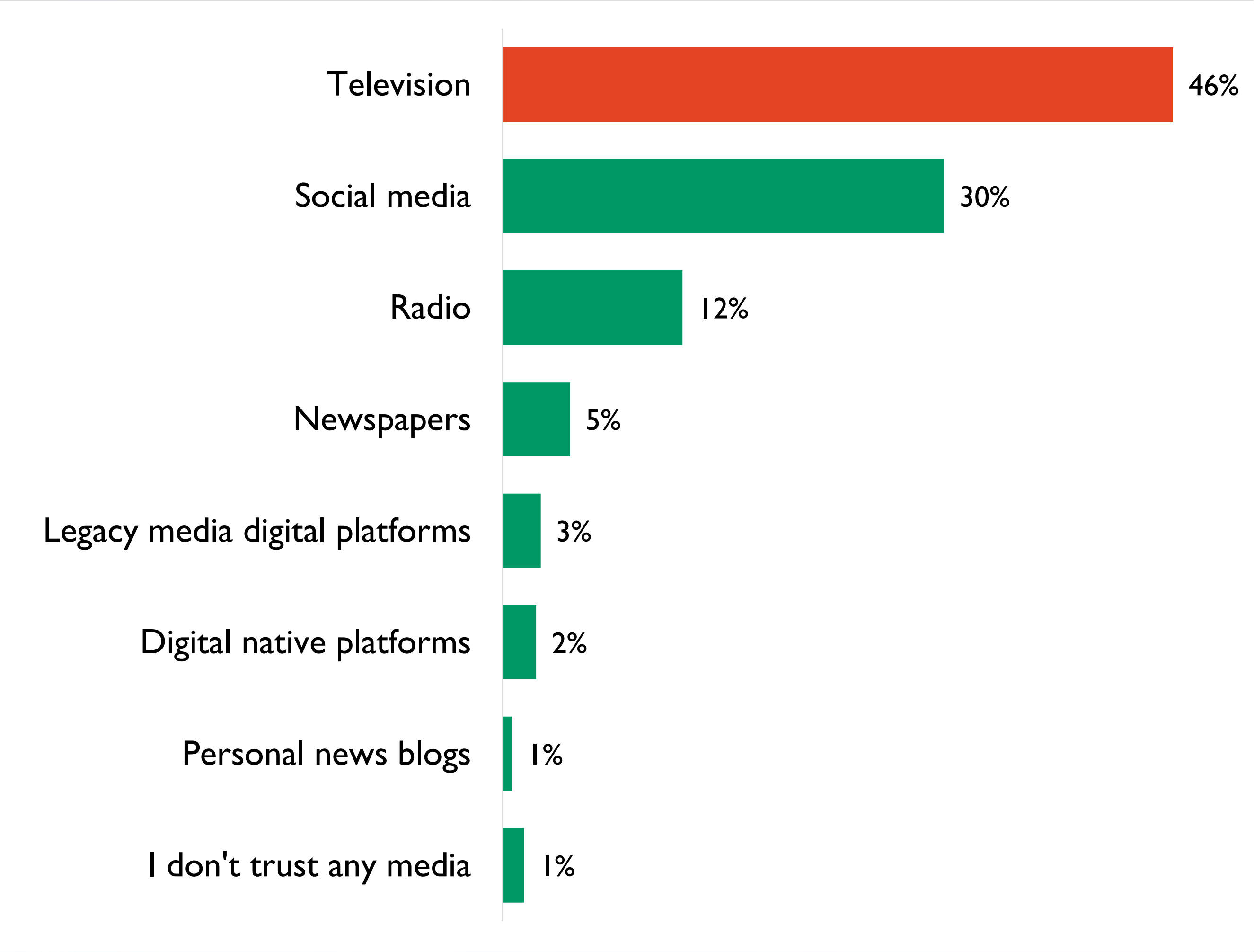
# Social Media is the Platform Most Relied on for News and Entertainment

Social media platforms preferred because they allow millennials and Gen Zs to consume content while at the same time contributing. The findings also suggest that media houses may want to reimagine, pursuant to suggestions in previous studies, 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.



# Most Trusted Media Platforms

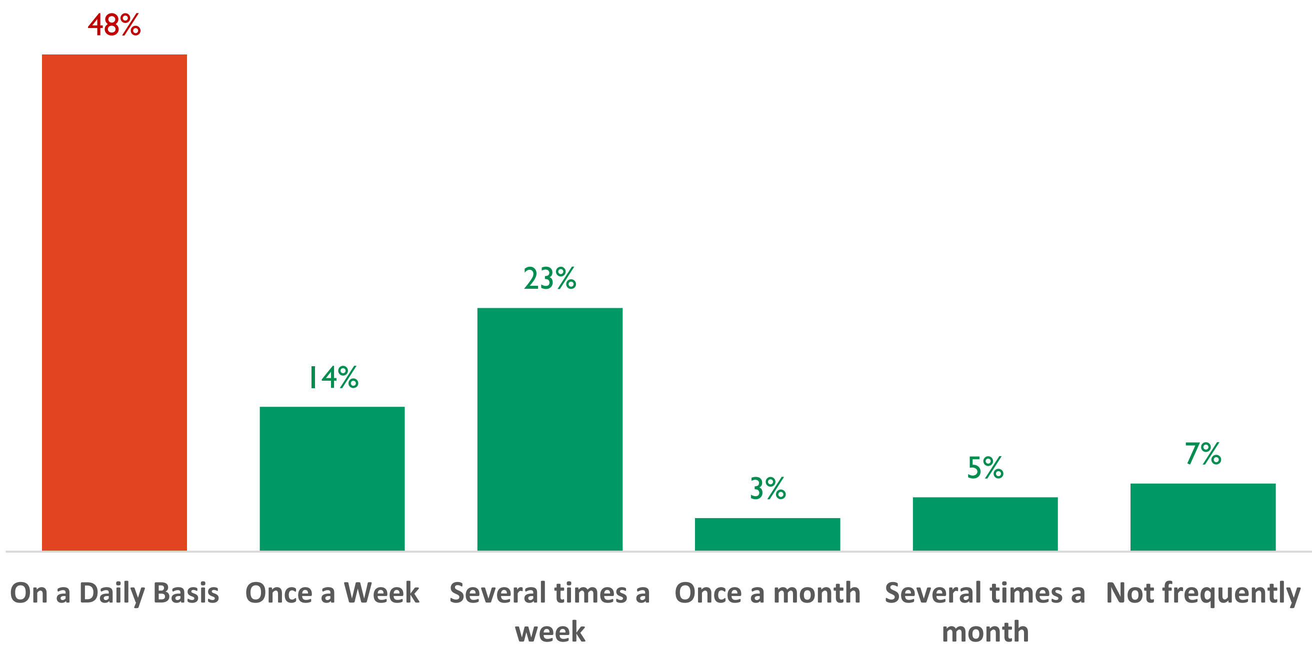
The participants in the FGDs also noted that social media platforms are more of the gateway to the legacy media, and they are only relied on and trusted as touch points of information alerts which are then verified on legacy media platforms. Only social media sites with a tradition for posting credible information are trusted not to warrant verification on legacy platforms.



# MILLENIALS AND GEN Zs PERCEPTION OF LEGACY MEDIA

# News Consumption Frequency on Mainstream Media Online Platforms

Generally, very high consumption of news on the online platforms of mainstream media. Same trend at the regional level though 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.



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

- **The majority of the surveyed millennials and Gen Zs agree that the news on legacy media platforms is relevant to them; credible, reliable and trustworthy; and 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.**

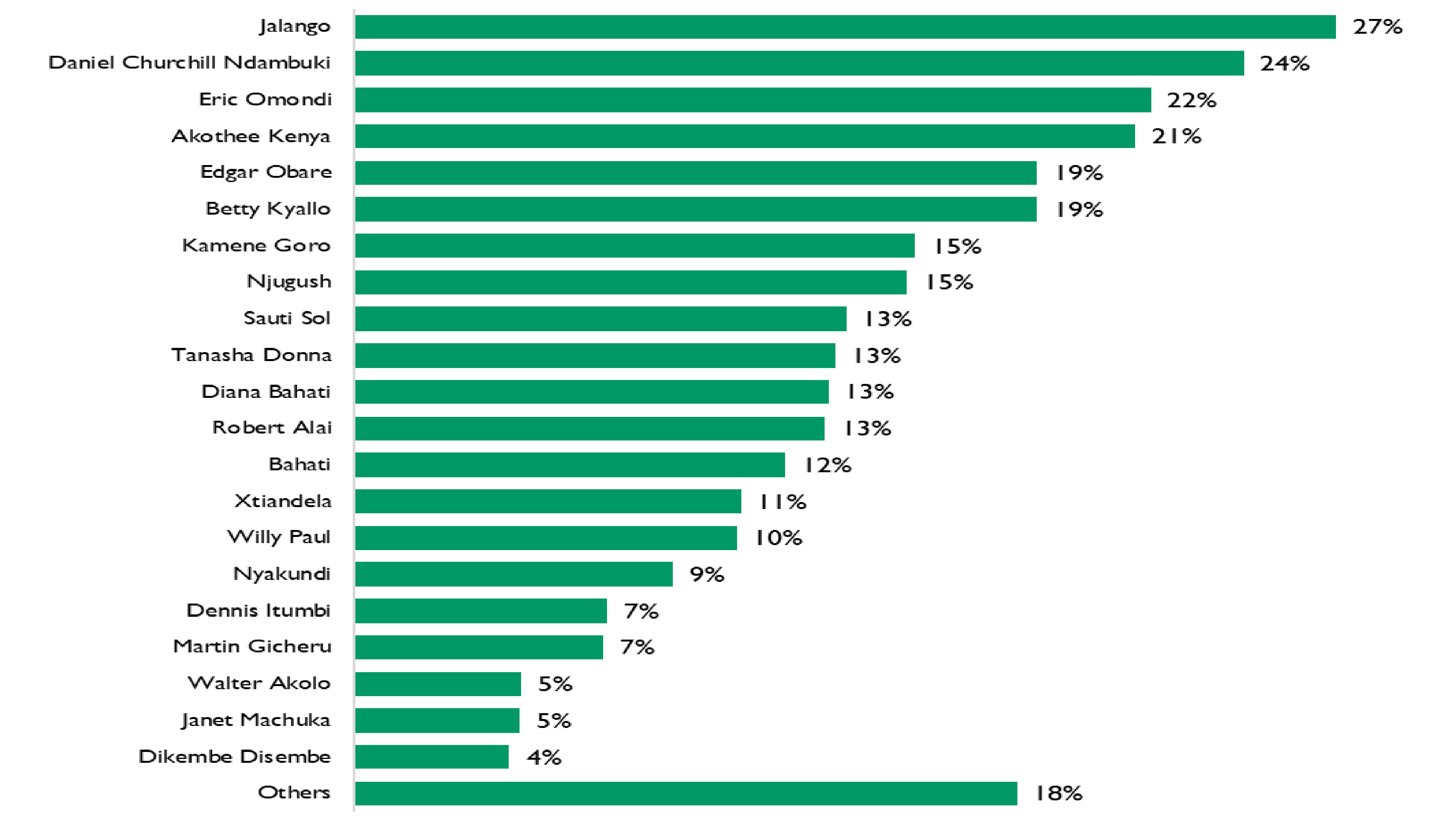
# Needs in Different Genres/Content Areas

| | 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 | 59% | 17% | 24% |

# Other Key Findings

| | |
|---|---|
| **1.** | Most Millennials and Gen Zs consume media at home (84%) |
| **2.** | Most use data bundles to access content online (88%) |
| **3.** | 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%). |
| **4.** | The tracking shows that millennials and Gen Zs spend relatively many hours online, with more than half (55%) spending 6-9 hours a day online and a further 20% spending more than 10 hours a day |

# Top Influencers Followed by Millennials and Gen Zs



# THANK YOU

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