2024 GENNEXT

YOUTH AMPLIFIED

RESEARCH METHODOLOGY

Sunday Times GEN NXT 2024

yellowwood

ABOUT YELLOWWOOD

It all began when Andy Rice founded Yellowwood in 1997.

Since then, we've helped our clients build better businesses. In doing so, we've also created a better business for ourselves. Today, we are South Africa's leading marketing strategy consultancy with clients that reach across Africa and the globe.

Over the years, we've deepened our specialist capabilities and grown our footprint, to evolve into a company that bridges the traditional divide between business and brand and in 2020 our expansion included merging with HDI Youth Consultancy to maximise our youth insights and capabilities, covering the full spectrum of the African market where almost 60% of the population is under 25.

Already known and respected for our deep strategic capabilities, we now hold the data-rich HDI properties Sunday Times GenNext, a youth behaviour survey that also explores which brands are successfully connecting with you and the Junior Board of Directors, three youth panels that provide meaningful insight into youth culture.

The best of HDI, including people, tools and platforms are fully integrated into Yellowwood's insight and strategy expertise.

It is this unique perspective that allows us to solve challenges with a disciplined, rigorous but pragmatic process, balanced with insight, creative and disruptive thinking. We call this 'Unconventional Wisdom®' and it all starts with asking 'why'.

At Yellowwood we provide our clients with tools that enable them to drive sustainable top line growth.

WHY

OUR VISION & PURPOSE

To be renowned as leaders in strategic marketing because we change businesses and human behaviour for the better

HOW

OUR APPROACH

We are a team of diverse thinkers who use our Unconventional Wisdom to drive sustainable growth.

WE VALUE

BRAVERY

Celebrating when we say and do the brave thing; for ourselves, for our team and for Yellowwood.

OWNERSHIP

We honour our commitments to each other, our clients and the business.

ORIGINALITY

We collaboratively create fertile ground for new ideas to thrive.

HUMANITY

We celebrate those who demonstrate genuine compassion for themselves and others, treating mistakes as opportunities to teach and learn.

OUR WORK IS TO DELIVER ON THIS PURPOSE

FOR OUR CLIENTS WHO SPAN MULTIPLE SECTORS

WHAT OUR CLIENTS HAVE TO SAY ABOUT US

ZIPPORAH MAUBANE

GROUP EXECUTIVE: MARKETING, ALTRON

"Working with Yellowwood led to **high-quality outputs** that not only have **internal buy-in** but are also business-focused and practical. The **positive feedback** from across the business, particularly those that were **initially averse** to the process, is proof of their abilities."

NOMSA CHABELI

FORMER GM BRAND & COMMUNICATION, MTN

"Yellowwood's team is **diverse, dynamic & engaging**. They **truly listen** to us, get deep into the fabric of our requirements and **deliver exceptional work**. They are an excellent **business partner** and continue to be an integral part of our team."

KHENSANI NOBANDA

GROUP EXECUTIVE: MARKETING & CORPORATE AFFAIRS, NEDBANK

"Yellowwood's team is **experienced, diverse & innovative.** They are able to engage with all levels in our business & **challenge our thinking.** They have consistently delivered work that moves our business forward."

CRAIG TOWNSEND

HEAD: BRAND & MARKETING, BONITAS

"Yellowwood's approach was **insightful and very thorough**. A journey that builds from one session to the next leaving little to chance, ensuring **all participants provide input and securing buy-in along the way**."

KILLY BACELA

DIVISIONAL EXECUTIVE: GROUP & INTEGRATED MARKETING, LIBERTY

"Their approach to every challenge is tailored, and they deliver a **consistent experience and quality outputs** regardless of changes to the team. Yellowwood has a core leadership team that is dynamic and really **understands the brand requirements for business success**."

WE ARE A DIVERSE COMPANY DRIVEN BY A TALENTED TEAM

& LED BY A PASSIONATE EXECUTIVE TEAM

Lesego Kotane
Managing Director

Wandile Nzimakwe
Strategy Director

Selae Thobakgale
Head of Comms Strategy

Ntombi Mkhwanazi
Head of Youth Strategy

Kananelo Tlanya
Operations Manager

Sabeeha Jhetam
Data Strategist

Shade Okoro-Obong
JNR Growth Strategist

Mpedi Shiloane
Growth Strategist

Phumelele Kubeka
Strategic Planner

Kulani Mayeki
Account Manager

Nhlaka Mahlangu
Strategy Analyst

Zinhle Mathebula
Operations Intern

Marang Nwako
Comms Strategist

Karabo Denalale
CEO - TBWA
HUNT LASCARIS

WE ARE THE DISRUPTION® COMPANY

#2 Most Innovative Companies (Fast Companies 2023)

Convention is the disease. Disruption is the anecdote

PROUDLY AFRICAN WITH WORLD EXPERTISE

Our team of global experts possesses a unique blend of creativity, technical expertise, and strategic thinking, allowing us to consistently develop groundbreaking solutions. We unite our most innovative talent and capabilities from across the collective.

WE UTILISE PROPRIETARY METHODOLOGIES TO ACHIEVE BUSINESS RESULTS

Disruption X is designed to multiply marketing impact. We use creativity to help businesses challenge the status quo, and capture an unfair share of the future. Disruption® is the antidote to incrementalism.

The TBWA\Backslash report contains 40 cultural meaningful cultural shifts that have the scale and longevity to propel a brand toward a greater share of the future. Backslash is a cultural intelligence unit powered by a global network of over 330 Culture Spotters from 70 offices across the TBWA\ collective.

WE HAVE PUBLISHED RESEARCH REPORTS

EXPLORING THE QUESTIONS WE THINK BUSINESSES SHOULD BE ASKING

OUR ACQUISITION OF HDI YOUTH IN 2020 INCLUDED

2 POWERFUL YOUTH PROPERTIES

Sunday Times

GEN NXT 2024

GENNEXT

Keeping track of how youth interact with and respond to brands is an ongoing process. Now in its twentieth year, the Sunday Times GenNext study is the leading annual youth brand preference and consumer behaviour survey.

Junior Board Of Directors by yellowwood

JUNIOR BOARD OF DIRECTORS

JBOD is comprised of four age groups: Tweens (8-13 years old), Teens (14-18 years old) and Young Adults (19-24 years old) & Young Professionals (25-30 years old). These groups of young people offer deep insights into brands, branding and product, and their relevance in-market through various interactions.

GENNEXT METHODOLOGY

OUR AMBITION

WITH THIS STUDY IS TO CREATE A BASE OF UNDERSTANDING THE YOUTH OF SOUTH AFRICA TO HELP BRANDS AND BUSINESSES DRIVE SUSTAINABLE GROWTH.

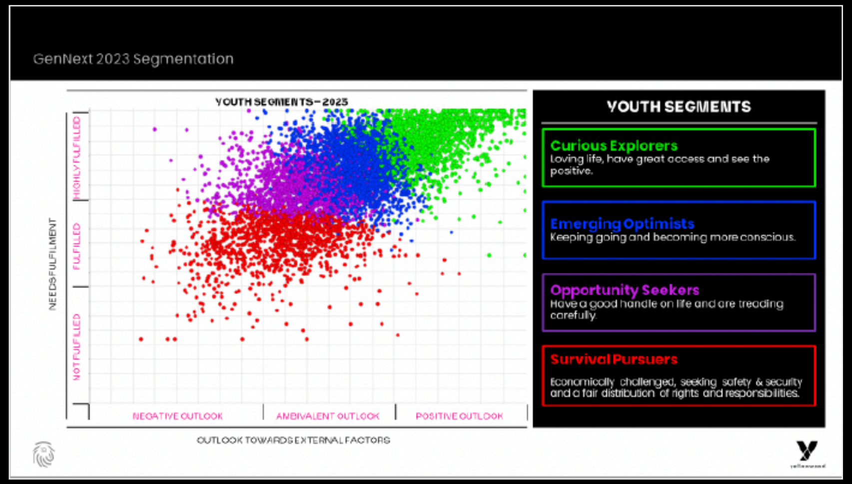
GENNEXT YOUTH PLATFORM

The Yellowwood's GenNext Youth Behaviour Platform provides a deeper understanding of South African youth, for anyone who wishes to engage with them successfully.

GENNEXT YOUTH BEHAVIOUR REPORTS

YOUTH SEGMENTATION REPORT

Our Youth Segmentation/ archetype challenges the view of young people as a homogenous market & provides marketers with 4 distinct youth segments.



JUNIOR BOARD OF DIRECTORS

JBoDs is our platform where we engage with young people on a regular basis to better understand insights from the report and keep us up to date with trends and what is affecting them.

Junior Board Of Directors by yellowwood

We need to start looking at the youth in the same multi-dimensional way we view adults. Our intent is to provide a deeper understanding of South African youth, for anyone who wishes to engage with them successfully.

COOLEST BRANDS SURVEY

Our brand preference survey identifies what youth think are the coolest brands across various categories. Based on the opinion of 5940 youth.

Sunday Times GEN NXT 2024

UNLOCKING YOUTH WORKSHOP

Yellowwood also provides clients with a GenNext Workshop titled "Unlocking Youth" to internalise insights and turn them into a future proof strategy to with the youth market.

YOUTH BEHAVIOUR REPORT OVERVIEW

This report is Phase 2 of a three-phase study. The Youth Behaviour Survey offers an overview of Youth behaviours, needs, attitudes, and insights into their brand interactions and the world around them. We will also look at the coolest brands to give a new dimension to the data.

SAMPLE SIZE (7200)

COOLEST BRANDS AWARDS

Phase 1 of the Brand Preference Survey, where respondents (aged 8-30 years) vote for the coolest brand in 85 categories drawn from an unprompted shortlisting*.

SAMPLE SIZE (7686)

YOUTH BEHAVIOUR REPORT

Phase 2, The Youth Behaviour Survey, provides insight into how young people engage with different categories and linked behaviour drivers. The results are applied to create a category report for Tweens, Teens, Young Adults and Young Professionals.

SEGMENTATION REPORT

Optional extension to the main report, including psychographic and demographic segmentation insights specific to category.

ONE-ON-ONE INTERVIEWS JBODS

LIVE PANEL ENGAGEMENT

In Phase 3, our JBOD (Junior Board of Directors) Youth Panel shares insights from the survey's quantitative phase .

*Please note the Brand Preference Survey is not covered in the Youth Behaviours Report. Available separately.

FOREWORD

For 20 years, GenNext has been the leading barometer of cool. In 2024, we are excited to unpack this curious metric safeguarded by Youth and Youth alone.

This year, GenNext is the comprehensive resource that will help marketers to practically understand what cool means for their brands and how the Youth perceive cool in their own world.

We will learn how cool exists, why, and what cool looks like to join in.

Let’s go!

REPORT **FRAMEWORK**

DEFINING **COOL**

- **Cool attributes** and what they mean
- Brands that **are cool**

- Youth behavioural **insights**
- **Shifts and trends** according to Backslash Edges

NEXT IN **CULTURE**

*Backslash Edges 2024 unpacking cultural shifts shaping our world

MEET OUR YOUTH

This year our Youth respondents occupy 3 distinct generations

GEN Y

1981 - 1996

GenY (Millennials) are the last generation raised "offline".

They can easily use and connect with digital media but are not natives, using these tools in ways that make life and tech distinguishable. Millennials are highly socially aware as they hold economic power while grappling with older generations' systems of power.

GEN Z

1997 - 2012

through social consciousness and is always connected.

With a special affinity for culture creation, they seamlessly live between the digital and physical worlds. By 2025, Gen Z is expected to comprise 27% of the global workforce, significantly influencing economic trends through their undeniable spending power.

GEN A

2011 - 2016

Gen A (Gen Alpha) is the vanguard driving cultural trends.

Global Youth data shows they are the most culturally diverse and connected generation ever. Their influence on the economy will reach unprecedented heights, reaching 2 billion people worldwide by 2025 and becoming the largest generation in history.

DEMOGRAPHICS

Youth Behaviour study phase 2 only

Youth Behaviour Sample Size 7686

GENDER

Female  50.1%

Male 49.9%

RACE

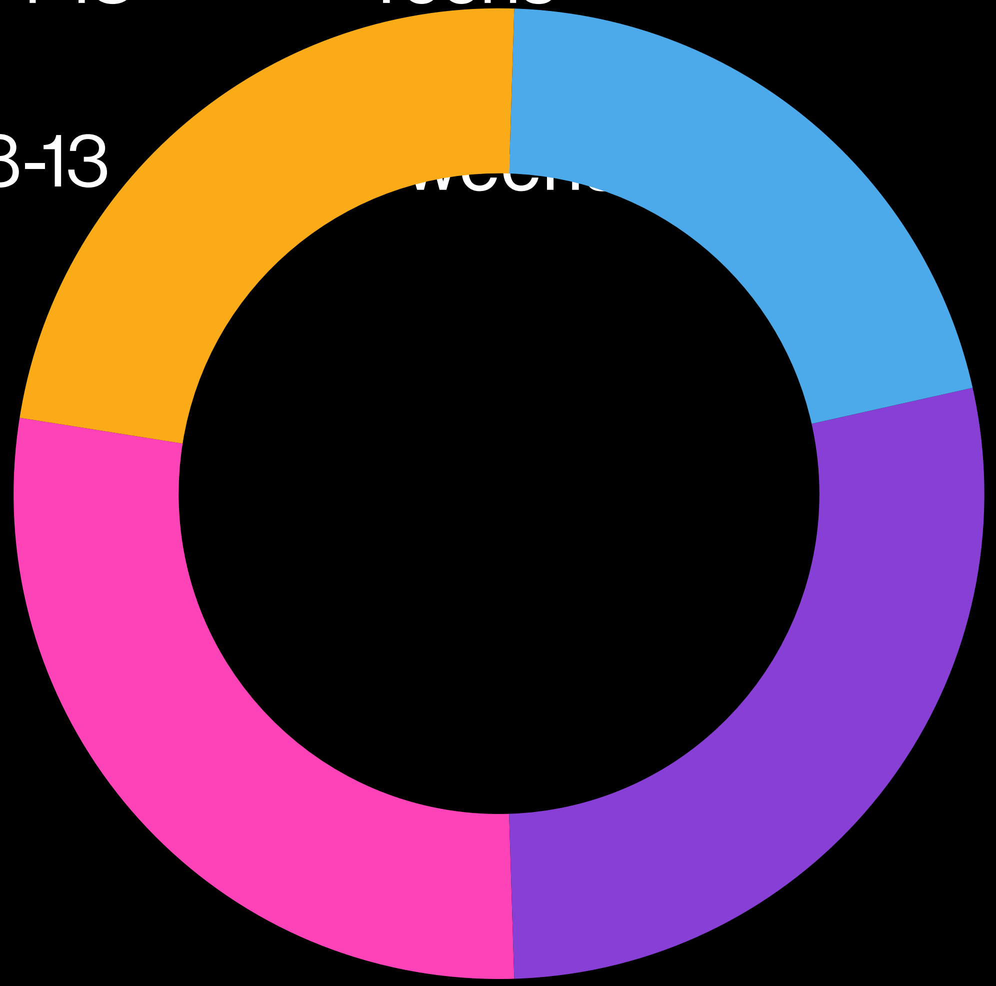
Black	81%
Coloured	9%
White	7%
Indian	3%

LSM

Most Youth respondents are between LSM 5-7

AGE

25-30	Young Professionals
19-24	Young Adults
14-18	Teens
8-13	



LANGUAGE

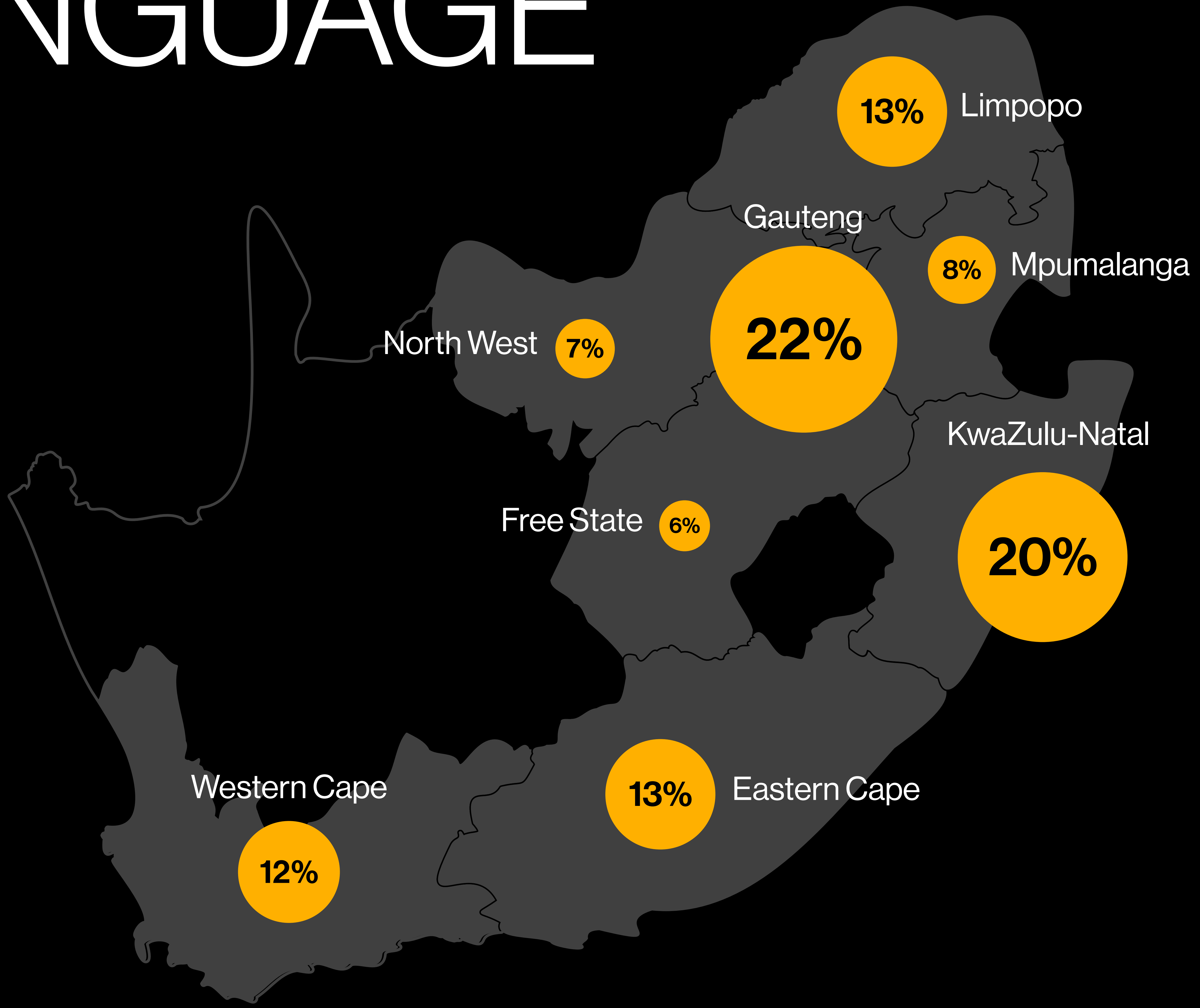
60% of Youth respondents speak isiZulu, English or isiXhosa as a first language

Confidential - Not for Public Consumption or Distribution

*Weights have been applied to more accurately represent age groupings

LOCATION AND LANGUAGE

Youth Behaviour Sample Size **7686**



55%
of Youth respondents came from Gauteng, KZN and Limpopo

The GenNext research study reaches Youth across South Africa.

Tweens and Teens are surveyed in schools. Young Adults complete an online survey in tertiary institutions. Young Professionals complete an online survey.

The Northern Cape was excluded from the survey due to its low and majority rural population and sparse distribution of schools for Tweens and Teens, with no effect on the survey sample.

SEGMENTATION REPORT OVERVIEW

This report is Phase 2 of a three-phase study. The Youth Behaviour Survey offers an overview of Youth behaviours, needs, attitudes, and insights into their brand interactions and the world around them. We will also look at the coolest brands to give a new dimension to the data.

SAMPLE SIZE (7200)

COOLEST BRANDS AWARDS

Phase 1 of the Brand Preference Survey, where respondents (aged 8-30 years) vote for the coolest brand in 85 categories drawn from an unprompted shortlisting*.

SAMPLE SIZE (7686)

YOUTH BEHAVIOUR REPORT

Phase 2, The Youth Behaviour Survey, provides insight into how young people engage with different categories and linked behaviour drivers. The results are applied to create a category report for Tweens, Teens, Young Adults and Young Professionals.=

SEGMENTATION REPORT

Optional extension to the main report, including psychographic and demographic segmentation insights specific to category.

ONE-ON-ONE INTERVIEWS JBODS

LIVE PANEL ENGAGEMENT

In Phase 3, our JBOD (Junior Board of Directors) Youth Panel shares insights from the survey's quantitative phase .

*Please note the Brand Preference Survey is not covered in the Youth Behaviours Report. Available separately.

OUR YOUTH SEGMENTATION

The youth segmentation model has been uncovered from the GenNext Youth Behaviour research. It challenges the view of young people as a homogenous audience and provides marketers with 4 distinct youth segments.

Curious Explorers

This group is positive, internally motivated and due to the back and forth nature of influence by and on their communities, are able to motivate and influence those around them. They are curious, have high self esteem and both needs and outlook show positive trends. Their needs being highly met give them a springboard for success.

Emerging Optimists

This group is somewhat positive, somewhat ambivalent, self empowered and resilient. They are disciplined in structured environments like school and sport, and are largely focused on their own self development. The political system affects their outlook, but they still have high self esteem.

Opportunity Seekers

This group is somewhat positive, somewhat ambivalent, still resourceful and are always looking to improve their lives by making changes to it. They are most concerned about safety and security which seems to have a big impact on their outlook. Their close knit families mean they have some influence, but this influence is likely to be contained.

Survival Pursuers

This group is ambivalent, with needs being just about met. They are characterised by their resilience and ability to be self-starters as they try to forge their own way in environments that are not necessarily easy to navigate. They are deeply concerned about safety and the political environment, but still show strong levels of self esteem.

Engage on Segmentation Take the next step in applying these insights for your business with a strategic team already deeply entrenched in the research and has a sharp view of where your business can harness the value of connecting with the GenNext youth segments more meaningfully. With our tools and approach tailored to your business challenge, you can drill these insights into your youth strategy seamlessly. Thise year we have made significant improvements.

COOLEST BRAND AWARDS

Our brand preference survey identifies what youth think are the coolest brands across various categories, based on the opinion of 7200 youth.

WHY TOP 10 COOLEST BRANDS:

A study of brand preferences that produces the Top 10 Coolest Brands rankings isn't just a list to be included on. GenNext is a youth performance indicator that every brand should utilise since it provides an objective view of your business' salience in the youth market and provides you with opportunities to improve.

RETAIL:

- Bank
- Insurance Companies
- Clothing store
- Accessory & Jewellery Store
- Clothing brands
- Shopping malls
- Online store
- Stationery store
- Health and beauty store
- Sit down restaurant
- Coffee shop
- Fast food places
- Shoes/footwear brands
- Toy stores
- Overall brand

FOOD & DRINK:

- Breakfast cereal
- Grocery
- Energy drinks
- Snacks • Sweets
- Chocolates
- Cold beverages
- Hot beverages
- Spreads
- Alcohol
- Sauces

TRAVEL:

- Motor vehicles
- Domestic airline
- Public transport brand
- Petrol station
- Local entertainment destinations
- Online accommodation booking sites
- Hotels

TECHNOLOGY:

- Cellphones
- Telcom provider
- Gaming console
- Console games
- Food delivery app
- Technology brand

LIFESTYLE:

- Company to work for
- Campaign targeted at youth
- Cares about my community
- Advertising medium
- Social media platform
- Saving and investment platforms
- Loyalty Programme
- Gyms

MEDIA & ENTERTAINMENT:

- TV channels
- Local TV programmes/ series Cartoon shows
- Kids TV channels
- Music store/website/ streaming
- Radio stations
- Daily Newspaper
- Weekly newspaper
- Local online influencer
- Local Celebrities
- Local radio Personality
- TV/streaming/content platform
- Local sportsperson

HEALTH & FITNESS:

- Female deodorants
- Male deodorants
- Feminine hygiene products
- Soap bars
- Haircare products
- Shower gel
- Skincare Product
- Make-up brands

EDUCATION:

- University
- Colleges

FUNDAMENTAL PREMISE OF THE GENNEXT STUDY

We must view Youth in the same multidimensional way as Adults. Nuance is key to understanding this emerging consumer category.

Given the dynamic and ever-evolving nature of the Youth perspective, we see a distinct demographic in research with each passing year that demands agility so we can adjust our viewpoints in response to these changes.

This report targets the key drivers influencing the behaviour of South Africa's Youth in 2024 and explores its implications brands and businesses.

DO YOU WANT

YOUTH INSIGHTS

TAILORED TO YOUR BUSINESS NEEDS ?

We've got you covered. Reach out to us and we can help businesses resonate better and drive impact with the youth.

Find out how you can leverage our GenNext offering. Send us an email at **info@ywood.co.za**