

Young Lives

How Youth in Ghana,
Kenya, Nigeria and Zimbabwe
Consume Media



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Acronyms

AIT

African Independent Television

AMDI

African Media Development Initiative

AMPS

All Media and Products Survey

BAZ

Broadcasting Authority Zimbabwe

BBG

Broadcasting Board of Governors
(USA)

CAK

Communications Authority Kenya

DHS

Demographic and Health Survey

DLA

Discovery Learning Alliance

FTA

Free-to-Air

GCA

Ghana Communications Authority

GSM

Global System for Mobile
communications

GSMA

Global System for Mobile Association

GSS

Global Shapers Survey

GW

Global Web Index

GYWI

Global Youth Wellbeing Index

HDI

Human Development Index

IPTV

Internet Protocol Television

ITU

International
Telecommunication Union

KARF

Kenyan Audience Research
Foundation

KBC

Kenya Broadcasting Corporation

KFC

Kenyan Film Commission

KFCB

Kenyan Film Classification Board

LTE

Long-Term Evolution

MNO

Mobile Network Operator

MPI

Multidimensional Poverty Index

NBC

National Broadcasting Commission
(Nigeria)

PAMRO

Pan-African Media Research
Organization

SDG

Sustainable Development Goals

TIFA

Trends and Insights for Africa

UN DESA

United Nations Department of Social
and Economic Affairs

UNFPA

United Nations Population Fund
(formerly United Nations Fund for
Population Activities)

UNICEF

United Nations International Children's
Emergency Fund

YAG

Youth Advocates Ghana

ZBC

Zimbabwe Broadcasting Corporation

ZHRC

Zimbabwe Human Rights Commission

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Foreword

Humans have been telling stories since the beginning. We relate to each other and share our understanding of the universe through stories, both true and fictional. From the earliest oral traditions to an Instagram 'story'; we connect, we discover, we learn, we exist, through stories.

The challenges we face seem to grow right alongside the opportunities to make progress – and even solve – many of the world's problems. The speed and variety of tools for storytelling is greater than ever. However, communications, and storytelling in particular, are still astoundingly underutilized as a tool for human, social and economic development.

Discovery Learning Alliance was established by Discovery, Inc. (parent company of Discovery Channel, TLC, HGTV, etc.) as a nonprofit organization to use the power of media to transform education and improve lives in marginalized communities around the world. Simply put, we believe modern storytelling – media – has a significant role to play in advancing education and public health outcomes as well as strengthening our social fabric and honoring positive traditions.

We commissioned this study to deepen our understanding of the rapidly changing media consumption habits of young people in Ghana, Kenya, Nigeria and Zimbabwe so that we can reach young people where they are today and anticipate where they are likely to be tomorrow. By expanding the production, distribution and engagement of educational, socially relevant and empowering media, we seek to provide new opportunities for African youth to realize their full potential while advancing the UN's Sustainable Development Goals.

We are grateful to M&C Saatchi World Services' Research, Insight and Evaluation team for their guidance to our evidence-based approach and for bringing together both art and science to better understand this evolving landscape where precious little data presently exists.

We hope this report will provide practical insights in order to outfit youth in these four countries for the journeys ahead.

Aric Noboa



President & Executive Producer
Discovery Learning Alliance

Preface

Over 200 million 15-24 year olds live in Sub-Saharan Africa. Despite the overwhelming challenges and opportunities presented by this population, there is a paucity of data on who they are, what they think, what they need, what engages them or on their information consumption patterns and preferences. Consequently, it is difficult to develop programs that can embrace the challenges and opportunities at scale.

The Research, Insight and Evaluation team at M&C Saatchi World Services specializes in gathering evidence to inform and evaluate engagement initiatives with hard-to-reach populations around the world. We have worked with Discovery Learning Alliance (DLA) team to generate a set of insights to inform a youth-focused strategy that makes optimal use of the data available; that responds to the gap in current knowledge by highlighting new opportunities for learning; and that emphasizes the need to address youth on their own terms.

The results of our efforts working with DLA are presented in this report. Data were gathered from secondary sources, re-analyses of existing data sets, published reports, grey literature and consultation with youth, media and development experts. Across Ghana, Kenya, Nigeria and Zimbabwe, the study identified the wealth of untapped creative talent of young Africans, as exemplified by many of the photographs in this report.

We are delighted that DLA has decided to share this report with peers and the development community more broadly. We sincerely hope that the insights presented here break new ground for young people and those committed to their advancement in the four countries covered and beyond.

Dr. Gerry Power



Chief Research Officer
M&C Saatchi World Services

Executive Summary

Discovery Learning Alliance (DLA) commissioned M&C Saatchi World Services to gather data and insights on young people (15–24) and their television and digital consumption patterns and preferences in Ghana, Kenya, Nigeria and Zimbabwe.

The findings of the research are designed to support DLA's vision to increase the production, distribution and impact of media that supports young people in their journey to adulthood and independence and that actively contributes to the achievement of key development goals through the distribution of high quality educational and socially relevant content at scale.

DLA had the following questions: 1) How, when and how often do young Africans consume content on broadcast and digital platforms? 2) Which channels and platforms do young people find most engaging and why? 3) What are the most important considerations in developing a media property for targeting the wellbeing of young Africans?

A broad range of data sources were accessed to address these questions. In order to establish the size and media consumption patterns and preferences of the target audience, a variety of reputable data providers were consulted, including: the Demographic and Health Survey (DHS) Program, UNICEF, the United Nations Population Fund (UNFPA), the United Nations Division for Economics and Social Affairs (UN DESA), Pew Research Centre, BBC Media Monitoring, BBC Media Action and national government statistical agencies.

Additionally, twelve interviews were conducted with youth, media and development experts, to provide additional data and a broad range of perspectives on the media landscape and the diverse behaviors, needs and aspirations of young people across the four countries. Finally, the M&C Saatchi World Services Research, Insight and Evaluation team have utilized the opportunities afforded by M&C Saatchi's global network of partners to access a variety of subscription-based and locally sourced datasets.

The range of datasets and reports consulted reflects the diversity of stakeholders interested in helping young people both in Africa and globally to overcome adversity. However, the breadth of research undertaken has uncovered a paucity of robust and reliable open access data on young people's television and online consumption patterns and preferences.

Across all four countries, migration of young people to the capital cities constitutes a shift in market concentration that will continue. Access to television is optimized in urban centers and usually limited in rural areas, with the cosmopolitan nature of metropolises meaning that less local adaptation of programming is necessary.

The four markets examined in this study exhibit different regulations on quotas for genres and international broadcast content; are at different stages in their transition from analogue to digital; comprise unique portfolios of content providers; vary in terms of the prominence of national versus regional players; and afford different opportunities for a strategic local distribution partner.

There is consistent evidence that young people are drawn to content that features people like them and reflects their lives – in terms of getting an education, securing a job and achieving independence in an African context.

Homegrown influencers across multiple domains – sport, music, religion, business and fashion – are increasingly engaging the attention and following of young men and women in Africa. These personalities have a particularly strong presence on digital platforms and are being courted by organizations like the British Council to increase their reach and gain credibility and legitimacy with youth audiences.

There is a dearth of opportunities for young people to express their opinions offline. There is a dearth of opportunities for young people to be creative. There is a dearth of platforms for youth-opportunity-oriented organizations to reach out at scale.

The three entertainment brands, other than sports, that have achieved pan-African appeal and status are *The Voice*, *Coke Studios* and *Big Brother*. In all cases, they are live and their format actively involves participants from multiple countries across Sub-Saharan Africa. They invite real-time participation through multiple mechanisms, including viewer-to-program interaction, program-to-viewer engagement and viewer-to-viewer conversation.

Across the four countries, a range of activities are inspiring young people to be playful and creative. These range from music festivals such as the Kenyan Music Festival and the Lagos-based Festac; visual art festivals such as Accra's Chale Wote Street Art Festival; and tech-based innovation through hubs and hacker spaces such as iHub in Nairobi and Kumasi Hive in Ghana¹.

Finally, in the absence of a robust, rigorous and systematic audience measurement and media consumption data resource, a pan-African digital youth panel may prove to be a valuable mechanism to gauge audience resonance and test new creative ideas going forward.

Introduction

Young people constitute a rapidly growing majority across Sub-Saharan Africa.

They experience high unemployment, are underserved in the health and education sectors, are marginalized within the governance process and are increasingly vulnerable in terms of their human rights, opportunities for advancement and susceptibility to radicalization.

Mass media can contribute to addressing these challenges by providing appropriate and tailored content at scale. To leverage mass media effectively, however, it is imperative for organizations to understand the media landscape, the size and profile of the target audience, and the barriers and opportunities young people face in accessing and consuming media content.

This report, commissioned by Discovery Learning Alliance (DLA), provides an audit of the media and youth audience consumption patterns and preferences in four key markets: Ghana, Kenya, Nigeria and Zimbabwe. Four objectives guided the research:

- To identify existing data on media access levels, patterns and trends for young people in the four target countries.
- To highlight any gaps in the existing data.
- To showcase the most promising channels and platforms to reach and engage young people.
- To uncover early insights to inform a robust, youth-centered content and distribution strategy.

Available Data and Gaps

The findings presented in this report are informed by in-depth interviews with twelve experts in youth, development, television and digital media in the four countries, along with analysis of data gathered from a diverse range of sources, including: the Demographic and Health Survey (DHS) Program, UNICEF, the United Nations Population Fund (UNPFA), the United Nations Development Program (UNDP) the United Nations Division for Economics and Social Affairs (UN DESA), the Global Shapers Community, the GlobalWebIndex (GWI) and Pew Research Centre. In cases where the raw data were unavailable, findings have also been based on a wide range of published reports and indices by organizations including BBC Media Action, BBC Media Monitoring, the British Council, the Commonwealth Secretariat, the International Youth Foundation and local government agencies. A full list of the documents consulted is included in the bibliography.

Media research and audience measurement in African countries pose serious challenges to even the most established industry players, with data often fiercely guarded to maintain a competitive edge in fast-changing markets. Multi-country studies that provide freely available, consistent data across populations are often guided by priorities other than understanding media, necessitating the amalgamation and interpretation of multiple datasets in order to generate answers

to single questions. The paucity of data harmonization makes interpreting the data and findings from different organizations a challenge. Furthermore, a tendency by companies to focus on a general audience rather than youths specifically means that much of the available data fails to shed light on the specific patterns and preferences of young Africans.

Promising Channels and Platforms

Regardless of their country of origin, young Africans often have similar aspirations, face comparable barriers and adopt shared attitudes and strategies in overcoming adversity. Their fashions, styles and preferences have become increasingly international, reflecting various aspects of global popular culture. This development has, however, been integrated with pride in local and national cultures, resulting in the hybridization of international and local styles, themes and influences that are fast becoming a hallmark of African self-expression.

The strong resonances between youth in the different countries raises the possibility of developing a brand that transcends borders. Indeed, organizations such as Deutsche Welle, Coca Cola and Well Told Story, together with television formats like *The Voice* and *Big Brother*, are already achieving multi-country reach and popularity across Africa. Digital platforms such as Facebook, WhatsApp and Instagram are similarly capitalizing on the massive growth in mobile broadband and interconnectivity on the continent, defining the ways in which the internet is accessed and understood in all four countries.

Despite these opportunities for multi-country engagement, our research has identified substantial disparities in the development and profile of each country's television sector. The digital transition, which promises to drastically expand their respective television sectors is, to date, only fully complete in Kenya. In all four countries, terrestrial channels that broadcast either nationally or regionally exhibit the greatest reach and popularity. Only a select few foreign-based pay-TV satellite operators (GOtv, DSTv, StarSat) can claim presence in all four markets, yet the prohibitive costs associated with these platforms means they remain the province of wealthier, better-educated, urban groups. Based on these findings, this report recommends developing country-specific strategies that optimize the fit of the media offering with the opportunities presented.

Early Insights for a Robust, Youth-Centered Content and Distribution

To support DLA in its vision of increasing the production, distribution and impact of youth-focused media that spans the four countries, the findings from this study shared with DLA have generated a series of recommendations focused on platform, channel, program and creativity considerations.

Methodology

Twelve interviews were conducted with a diverse sample of key experts in youth, development, television and digital media in Africa.

Participants received an invitation letter from M&C Saatchi World Services, explaining the research purpose and substance of the interview. A semi-structured discussion guide was developed for the interviews. Each conversation lasted 30–40 minutes and the discussion was audio-recorded and transcribed. Interviewees were not reimbursed for their time.

Where raw data was available, quantitative analysis of secondary data from a variety of sources was performed. In addition, our findings were informed by a review of key reports, documents and published articles, together with websites and blogs. A full list of documents reviewed is contained in the bibliography.

REPORT STRUCTURE

The main body of this report comprises 5 sections. Section 1 presents overarching insights that apply across the four countries, Sections 2-5 deal with each country in turn. Each country report is subdivided into four parts: Demographics and Development; Television; Digital and Cultural Observations; and provides the following:

1. Demographics and Development

- 1.1 Demographics
- 1.2 Development

2. Television

- 2.1 Market Sizing Estimates
- 2.2 Access
- 2.3 Ownership
- 2.4 Patterns
- 2.5 Preferences

3. Digital

- 3.1 Sector Overview, Access and Device Ownership
- 3.2 Preferences

4. Cultural Observations²

- 4.1 Attitudes to Their Country
- 4.2 Commitment to Social Change
- 4.3 Routes to Youth Empowerment



¹<https://vc4a.com/kumasi-hive/>; <http://impendingboom.com/2018/05/30/visiting-nairbis-innovative-tech-hub-digital-agency/>

²Due to limited data Zimbabwe does not follow this structure.

Overarching Insights

OVERARCHING INSIGHTS

- 1.0 Youth
- 2.0 TV
- 3.0 Digital

YOUTH

Common Tastes

African youth share common consumption patterns of popular culture products and genres, and of global brands and celebrities.

Common enjoyment of genres such as reality television and platforms dedicated to celebrity gossip, sports and entertainment news point to a shared set of preferences rooted in popular culture across the four countries.

“Young people out here are definitely no different to [young people] out there. They’re really clued up in terms of what’s hot...It’s the same across the three markets that I navigate on a monthly basis: the consumption of what’s really cool, predominantly from either the US or Europe.”

Media Expert: Zimbabwe

The cross-border appeal of global celebrities (e.g. Jason Derulo) and Western television formats (e.g. *Big Brother*, *The Voice*), together with the widespread adoption of social media including Facebook, Instagram, YouTube and WhatsApp, indicates that African youth are increasingly integrated into global popular culture.

Glocal Identities

Young African identities are increasingly being expressed via an integration of the global with national, local and age-related trends and symbols. Rather than being passive consumers, hybridization of global products and brands with localized themes and fashions is a hallmark of their self-expression.

“You will always have a feel of our content. It’s an inner pride being able to integrate whatever they are doing, or whatever is obtainable in the international scene, and being able to bring it home and adapt it.”

Media Expert: Ghana

Global brands are responding in kind. Nike’s ‘Naija’ sports line, designed for the 2018 World Cup and worn by the Nigerian national team, adopts a local term especially associated with youth. According to a Nike press release ahead of the release of its new collection:

“As a descriptor, [Naija] defines a certain future-focused optimism — one that has catalyzed a new generation of Nigerians to celebrate the nation’s vibrant culture. Use of the word requires attitude, even panache. Naija reflects a youthful exuberance, pride and fresh perspective on patriotism. To some, Naija translates directly to “the new Nigeria.”¹

Increasingly Cosmopolitan

Cities present a strong draw for young people, as places of opportunity, melting pots of style, and style vanguards. Especially as they approach maturity, young people are looking to metropolises and capitals such as Lagos, Nairobi, Accra and Harare.

Population trends demonstrate increased migration to the city, especially for individuals in their post-teen years. The data indicates the impact urban living has on their outlook.

In Kenya, for example, while a total of 38% of all young people surveyed indicated a desire to travel abroad, for urban youth the percentage was 64% (British Council, 2018).

Experts, meanwhile, suggest that capitals in particular play a strong role in leading fashions:

“Young people like whatever is urban-based, even the ones which people are outside the urban areas. NTV is most watched because it’s more youth-oriented, unlike Citizen TV which is national, but mass-oriented, so it does a lot of programming in the local Kiswahili language... if your target is the young, you go urban-oriented televisions like NTV and then KTN.”

Media Expert: Kenya

Value Authenticity

African youth are responsive to content and brands that reflect their reality. They respond most positively to brands that they trust, and that have youth priorities at their center.

In 2014, Harambee – an independent, not-for-profit social enterprise addressing youth unemployment in South Africa – was among top 10 favorite brands for low-income respondents, competing with global brands such as Nike, KFC and Coca-Cola (Yellowwood, 2014). To achieve this level of recognition, brands need to understand and align themselves to the lived reality of young Africans. Currently, however, media offerings are failing to do so.

“We have to be authentic, and we have to work with people who have credibility. I think the problem is between reaching and engaging. You can reach them, but unless you’ve got something authentic and credible to talk to them about, you won’t get them engaged.”

Multi-country Expert: Youth Culture

“Young people are seeking content that validates their individual life in the context that they currently are. The closer the story is to their reality, the more successful it will be to engaging young people in gaining their trust. But a lot of media providers come to African countries to showcase their media applications that young people should have, which are so detached from their reality that they, kind of, disregard it as a fairy tale.”

Development Expert: Kenya

Shared Challenges and Barriers

Young people in Africa face a range of common challenges, including severe unemployment, poor access to and limited opportunities for progression in education, lack of platforms for civic engagement, health issues such as high HIV prevalence and vulnerability to substance addiction. They frequently report feeling left behind by their governments, and part of a system that is stacked against them.

Platforms such as Deutsche Welle’s *The 77 Percent*² seek to address these common challenges by providing African youth with a common forum in which to engage in debates and share their stories and aspirations.

Shared Strategies for Addressing and Overcoming Adversity, Including:

Solidarity

Young people are making themselves heard through physical protests, viral trends on social media and the organization of youth advocacy groups.

In Zimbabwe, hashtags #ThisGown and #ThisFlag formed the basis for mass social movements against then-president Robert Mugabe, with #ThisGown used particularly by youth to protest against mass unemployment and lack of opportunities.³

Similarly, Nigerian youth turned to social media to reject President Muhammadu Buhari's April 2018 accusation that they were "lazy and uneducated", adopting the hashtag #LazyNigerianYouth. Further rebutting Buhari's claim, some youth even managed to turn the hashtag into a business opportunity, creating clothing bearing the phrase.⁴

Entrepreneurship

Young people across Africa are leveraging the opportunities offered by new technologies, industries and fashions to achieve independence.

Kenya has been described as Africa's emerging Silicon Valley. Across Africa, governments, international entities and local organizations are seeking to capitalize on African youth's entrepreneurial spirit by creating conditions for a robust start-up ecosystem. Examples of such initiatives include funding mentoring programs, promoting investment in innovation programs and DFID-funded SPRING programs.⁵

Creativity

Music, visual arts and filmmaking are all industries that are of great interest to young people in Africa, both as consumers and producers.

Festivals, for example, have mass appeal and serve a variety of purposes. The Kenya Music Festival, organized by the Ministry of Education, is one of Africa's largest competitive music festivals for schools, colleges and universities, providing a forum for performers and aiming to preserve Kenya's rich cultural heritage. Festac, or the Lagos Music Festival, similarly aims to develop Nigerian musicians and artists, providing them with a platform that brings together national and international music scenes.

Digital platforms in particular, such as Tumblr, Instagram and YouTube, are providing young people with free and easily accessible forums on which to develop and publicize their creative work.⁶ Currently, however, the complexity and technicality of television often prevents young people from expressing themselves through that medium.

"I started up a company called Me TV Africa with a friend of mine. We felt that there were so many young producers who were just sitting on content that was never at a level that could be accepted by a number of broadcasters: the content was usually very edgy; ranging from documentaries to short films."

Media Expert: Zimbabwe

"What's great for young people in those countries is an ability to create, broadcast, engage and promote themselves. But as soon as you have a conversation about a platform like television, there's incredible layers they don't have access to."

Multi-country Expert: Media, Arts and Culture

TELEVISION

Significant Urban/Rural Divide

Cities and metropolises constitute the heart of the television industry in Africa. In the four countries, hubs include Accra and Kumasi in Ghana; Nairobi in Kenya; Lagos in Nigeria; and Harare in Zimbabwe.

These cities have the largest youth audiences, have the best and most reliable access, exhibit the widest diversity of stations and channels, and offer better quality programming. Due to the cosmopolitan nature of these urban hubs, they also represent the areas of greatest common ground between the four countries.

In rural areas, by contrast, radio remains the dominant medium. Television access is limited by power outages, poor connectivity and low household ownership. Due to lack of commercial interest and a preference for local languages, programming is often limited to poor quality local productions, along with locally dubbed, imported soap operas.

Uneven Sector Development

The television sectors in Ghana, Kenya, Nigeria and Zimbabwe are infrastructurally distinct.

For example, whereas broadcasting and competition in Nigeria is predominantly regional, in Ghana and Kenya major channels are broadcast nationally, with a limited number of channels controlling the market. To date, only Kenya has achieved full analogue switch-off, opening its television market to a range of new operators in the process. While Ghana is close behind, Nigeria and Zimbabwe are still struggling with delays.

Uneven Broadcasting Regulations

Regulation frameworks and enforcement bodies vary across the four countries, and quotas for locally produced and sourced content are often present.

In December 2015, for example, the Communications Authority of Kenya (CAK) issued the Programming Code for Free-to-air and radio and television. The code sets standards for – among other areas – local content quotas.⁷ The Kenya Film Classification Board (KFCB), which monitors programs broadcast by television stations, has warned that channels risk closures if they do not air 40-60% local content in their programs (CAK, 2016a).

In Zimbabwe, given the country's ongoing tumultuous history, state interference in private media ventures has been a longstanding issue. In August 2017 the

Broadcasting Authority of Zimbabwe (BAZ) banned the new pay-TV satellite operator Kweze TV, although the High Court overturned its decision in September that year.

Piracy Disrupting the Pay-TV Model and Local Production

Film and television piracy are rampant across Africa. The growth in broadband capability across the continent is driving the growth of the black market, as distributors of pirated content are able to quickly and easily download, store and transfer to consumers the latest films and series for fractional costs via flash drives. Poor regulation and enforcement mean distributors operate openly, trading on streets and from kiosks. Cheap dubbing and subtitling software also allow consumers to watch films and series in the language of their choice.

As well as reducing incentives to subscribe to pay-TV channels and reducing advertising revenue, piracy is restricting the growth of quality local television production, making it difficult for homegrown producers to scale up (Balancing Act, 2016b).

Audience Measurement a Serious Challenge

Western approaches are ill-suited to a range of factors, including: poor infrastructure such as unreliable power supplies, which disrupts viewing patterns; difficulties inherent in panel management and consumer profiling; erratic consumption motivated by a variety of circumstances, including audiences' precarious financial stability; and the lack of robust, up-to-date and reliable secondary data.

"Your traditional research houses... try to come into these African markets with a European approach. But how do you set up a panel when there are power outages? Or when you put someone down as a GOTV subscriber, but next week he's pulled out his box and put in a StarTimes one?"

Multi-country Expert: Television

Different Markets Exhibit Unique Flavors

Key crossover preferences notwithstanding (see below), audiences in all four countries express biases against certain forms of content broadcast at the national, regional and even local levels.

Language, especially, constitutes a potential obstacle at all three levels. While English is spoken widely in all four countries, variations in accent can prompt different responses from a country's audiences, and indigenous languages are often preferred, particularly where education levels are low. As a result, channels specializing in local language television are growing in number.

"There's quite a bit of regional difference. The Nollywood content is popular, but more in West Africa, and equally, the Swahili content in the East but not the West. And even between countries there are issues... [Even if they all speak English], there's the Queen's English, then other Englishes, and they might not like each other's English. [So] there's a lot of adaptation into local markets, but obviously all of that adds costs." Multi-country Expert: Television

Despite Country and Regional Differences, Several Entertainment Genres and Formats Successfully Span All Four Countries:

Telenovelas are cutting through language and cultural barriers

United States, Korean, Chinese, Mexican and Indian soap operas are all being consumed by African audiences. Nollywood, meanwhile, continues to flourish both in Africa and globally. The diversity of country of origins illustrates the extent to which the genre itself appeals to a mass African audience.

"If you want something global and universal for Africa, it would be your novela channel. Your Telemundos, your ZEEs...Anything that's carrying telenovelas will have universal appeal." Multi-country Expert: Television

Music is driving cross-pollination of local cultures together with the global music scene

Coca-Cola's weekly television show *Coke Studio Africa* features performances from a melting pot of up-and-coming musicians from countries across Africa. Started in 2013, it currently reaches thirty countries across East, Central and Southern Africa. Its total potential reach is estimated at half a billion viewers and spans 3,000 distinct ethnic groups.⁸

"Coke Studio is bringing live musicians to have sessions together but cross-pollinating the audiences. So in Kenya, they have a Nigerian artist, and then they have the content they can play out both in Kenya and Nigeria."

Multi-country Expert: Youth Culture

Reality television is capitalizing on the possibilities of social media

Other than sports entertainment and live music formats such as *The Voice* and *Coke Studio*, *Big Brother* is the only television format that has succeeded in generating extensive reach across African countries. In common with the previous formats, reality television offers live performances and can feature participants from a range of countries. Such formats also make the most of the opportunities presented by social media.

At the end of the latest season of *Big Brother Nigeria*, the show had reportedly garnered over 420,000 Facebook fans, 320,000 followers on Instagram, and 160,000 followers on Twitter. Over 26 million votes were recorded for the finale alone, while 13 million votes were garnered in the penultimate week.⁹

Across all countries investigated, second-screening is an emerging trend, with social network and instant messenger apps the most popular while watching television.



DIGITAL

A Mobile-First Internet Economy

Mobile broadband is the predominant form of internet access across Africa. By 2020, the number of mobile broadband connections in Sub-Saharan Africa will reach 500 million – more than double the number recorded at the end of 2016 (GSMA, 2017). Rapid adoption is being driven by growth and innovation in the mobile telephony sector, together with more attractively priced data tariffs and increased affordability of internet-enabled mobile devices.

While feature phones are still used by young people aged 15-24 – especially those still dependent on parents – sales of feature phones are dropping across Sub-Saharan Africa. Smartphones costing less than \$100, mostly from Asian manufacturers such as Gionee and Tecno, are now commonplace across the region (GSMA, 2017).

A Social Media Internet

In all four countries investigated, MNOs are using attractively priced data bundles to attract consumers. Social bundles provide cheap or even free access to popular social media and instant messenger applications such as Facebook and WhatsApp.

For those with less disposable income, these bundles mean internet access is often confined to these networks and applications. Additional data costs disincentivize young people from accessing, for example, Google or regular websites, or from following hyperlinks away from social media platforms.

Uneven Topography of Access

‘Zero-rate’ data initiatives mean wider basic access, but varying degrees of ability to access different services.

Applications like Facebook’s Free Basics, which provides users access to data-light websites and services without incurring mobile data costs, mean greater rates of internet access in developing countries, but only to select areas of the internet, and only to specific kinds of content. On Free Basics, for example, Facebook is the only social media network and email is not available. Furthermore, only text is available, rather than videos or images.

The range of levels at which users from different backgrounds are able to access the internet means that organizations are adopting flexible strategies to engage different groups, rooted in an understanding of their offline realities.

“The reality is if most of our users are on feature phones, the more imagery or the more interactive you make your website, the harder it is for them to load.”

Multi-country Expert: Digital

Unique Online Communities

Factors such as prohibitive data costs and an internet increasingly confined to social media shape digital behavior in unique ways.

“A lot of people use WhatsApp not as a person-to-person communication tool, but almost like social media: [Whatsapp] groups based on interests, with maybe 160 people. And everyday they will post news, deals and stuff. And it seems especially in a country like Zimbabwe, this is people’s main source of information from the Internet.”

Multi-country Expert: Digital

Organizations that understand these behaviors are leveraging them for a variety of purposes, including disseminating reliable information, providing networking opportunities, and gathering feedback.

“Organizations like CamFed have a network of quite a substantial number of young women that’s WhatsApp driven and is quite a powerful tool. Because young women aren’t just using it for basic communication but for networking purposes, business development - all kinds of things.”¹⁰

Development Expert: Ghana

Homegrown Influencers

Influencers native to Africa operating across multiple domains – sport, music, religion, business, fashion – are increasingly engaging the attention and following of young men and women in Africa. These personalities have a particularly strong presence on digital platforms and are being courted by organizations like the British Council to increase reach and gain credibility and legitimacy with youth audiences.

“Through our different social projects, we might have an ambassador that’s a musician that has great reach.”

Multi-country Expert: Youth Culture

Marketing blogs dedicated to influencer marketing in Africa are typically country-specific, suggesting that localized online celebrities are more effective for communication than global figures.¹¹

Youth ambassadors need to be authentic and relatable, and therefore in touch with the reality of the audience. Lifestyle bloggers such as Jemila Wumpini Abdulai, who won the African Blogger Awards in 2016, engage with youth entrepreneurship and development priorities, advocating for women’s rights while writing blogs on improving social media marketing.

¹<https://news.nike.com/news/2018-nigeria-national-football-team-kit>

²Launched on December 4, 2017, Deutsche Welle’s The 77 Percent is an online debate platform for young Africans to encourage conversations around politics and other issues that concern the youth of Africa.

³<http://nehandatv.com/2016/08/05/unemployed-graduate-speaks-thisgown-protest/>

⁴<https://www.nationalhelm.co/2018/04/lazy-nigerian-youth-turns-buharis-statement-into-business-photos.html>

⁵<https://www.gsma.com/mobilefordevelopment/program/ecosystem-accelerator/a-deep-dive-into-the-ghanaian-start-up-ecosystem/>

<https://www.nbcnews.com/news/nbcblk/kenyan-entrepreneurs-help-youth-thrive-africa-s-emerging-silicon-valley-n826156>

<http://www.startup-mentoring.org/for-ghana-based-startups/>

⁶<http://2manysiblings.tumblr.com/>

⁷Defined as television or radio programs excluding news and advertisements, which fulfill any five of the following conditions: (a) the production is made in either Kenya’s indigenous or official languages; (b) production and post-production was wholly or partly done in Kenya; (c) the content deals with issues that are unique and relevant to Kenyan audiences; (d) at least 20% of the share of the production company are owned by Kenyans; (e) at least 50% of the leading actors, major supporting cast appearing in the program and technical crew are Kenyans; (f) the location of shooting, in case of audiovisual programs or performance was wholly or partly in Kenya; (g) the author(s) of the program are Kenyan (whether or not the program is produced in conjunction with a co-producer, an executive producer or director who is not Kenyan) (Communications Authority of Kenya, 2016a)

⁸<https://digiday.com/marketing/inside-coke-studios-growth-africa/>

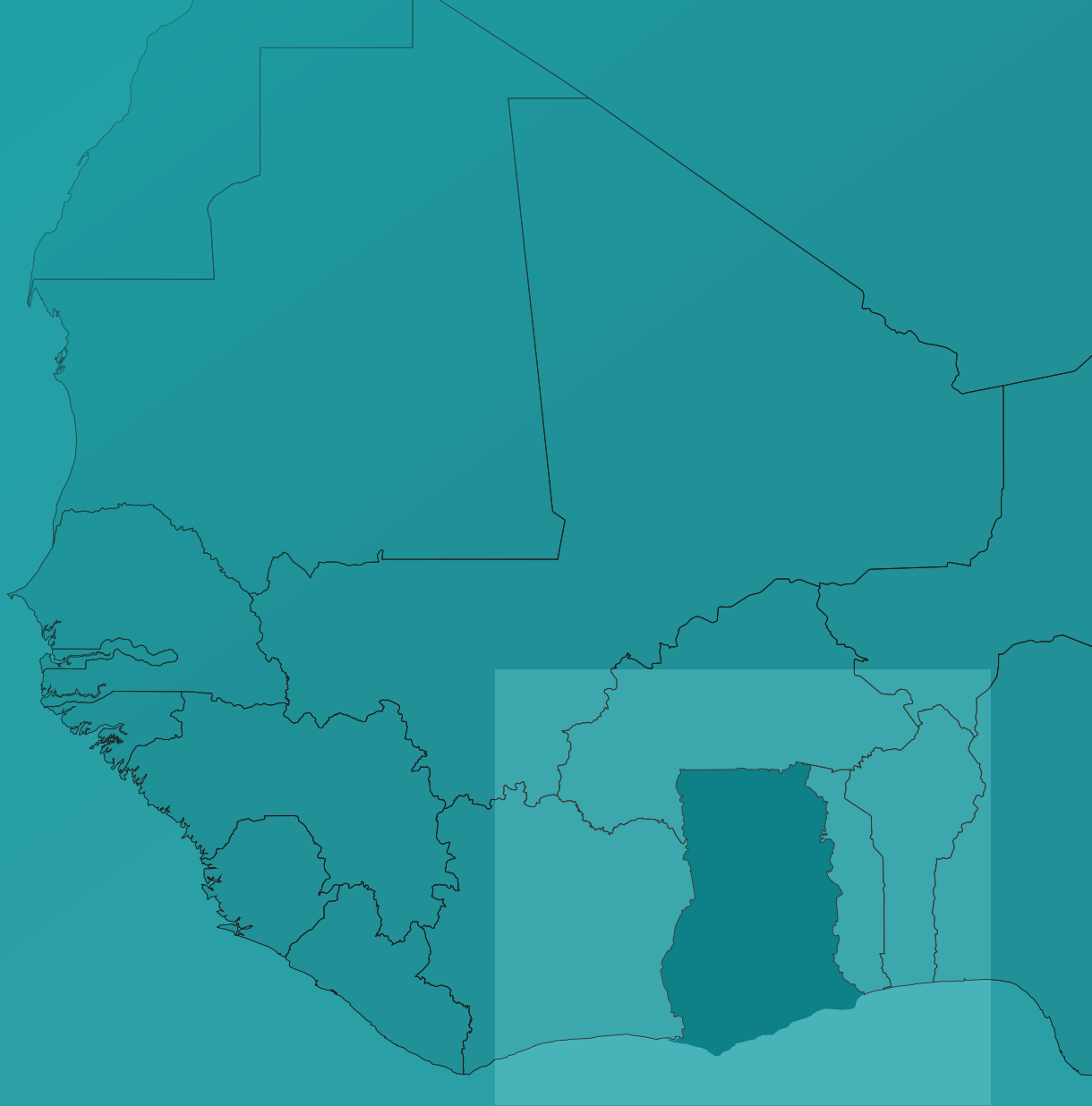
⁹<http://www.tribuneonlineeng.com/85400/>

¹⁰CAMFED: Campaign for Female Education: <https://camfed.org/our-impact/ghana/>

¹¹<https://bhadoosky.com/2017/11/07/top-17-young-social-media-influencers-nigeria-2017/>

<https://businesstoday.co.ke/top-social-media-influencers-kenya/>

Ghana



GHANA

- 1.0 Demographics & Development
- 2.0 TV
- 3.0 Digital
- 4.0 Cultural Observations

1. Demographics & Development

1.1 DEMOGRAPHICS

2nd largest youth population in Western Africa

Young people currently make up 19% of the entire Ghanaian population. At 5,718,000, the country has the 14th largest youth population in Africa, while in Western Africa, only Nigeria has a larger youth population (UN DESA, 2017).

Slower rate of growth than other Sub-Saharan youth populations

The young population is growing at a rate of 1.4%, as compared to Sub-Saharan Africa's overall rate of 2.1%. By 2030, the Ghanaian youth population is projected to grow by 22%, numbering 7,308,000 (UN DESA, 2017).

But clear movement of young people into cities—especially Accra

The country's rate of change for its urban population is 3.3%, which is lower than the Sub-Saharan overall rate of 3.7% (UN DESA, 2018).

However, while a slim majority of Ghanaian young people grow up in rural areas, by the ages of 20-24 over 50% of young people are urban. This migration is predominantly towards the Greater Accra region, home of the country's capital. By the ages of 20-24, over 20% of males and females are living in Greater Accra (see Figure 1).

1.2 DEVELOPMENT

Strong traditional education compared to other three countries, although still struggling on a global scale

Among the countries investigated (Ghana, Kenya, Nigeria and Zimbabwe), Ghana has the highest rate of secondary school enrolment and the highest expected years of schooling (see Figure 2).

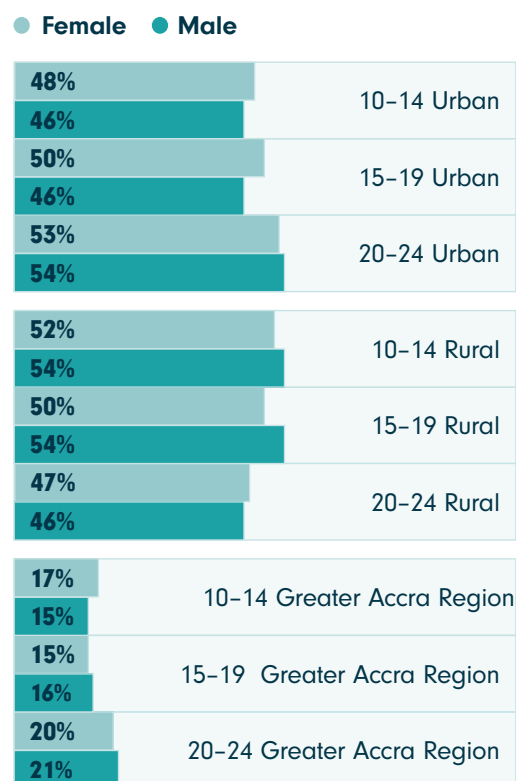
However, on the Commonwealth Youth Development Index it still ranks in the bottom third of countries worldwide (YDI, 2017).

Young people in Ghana are exposed to the internet later in life

A digital native is defined by the ITU as a youth aged 15-24 with five years or more experience using the internet. In 2013, when the ITU Digital Native Index was published, Ghana had the lowest rate of any of the four countries (ITU, 2013).

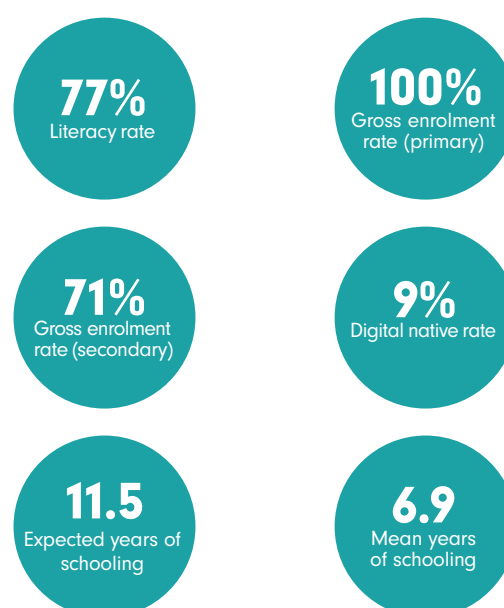
As a result, Ghanaian youth are less likely to be exposed to the learning opportunities presented by digital platforms.

FIGURE 1. PERCENTAGE OF YOUTH LIVING IN URBAN HUBS



UN DESA (2018); UNFPA (2018a)

FIGURE 2. GHANA KEY EDUCATION INDICATORS



UNDP (2016); ITU (2013)

2. TV

2.1 MARKET SIZE PROJECTIONS

National Youth Population: 5,718,000*

Estimated Market Size: 3,310,429**

Upper West

Share of youth population: **3%**
Share of youth market: **2%**

Upper East

Share of youth population: **5%**
Share of youth market: **3%**

Northern

Share of youth population: **9%**
Share of youth market: **5%**

Volta

Share of youth population: **8%**
Share of youth market: **8%**

Brong-Ahafo

Share of youth population: **9%**
Share of youth market: **7%**

Eastern

Share of youth population: **10%**
Share of youth market: **10%**

Ashanti

Share of youth population: **18%**
Share of youth market: **21%**

Western

Share of youth population: **11%**
Share of youth market: **11%**

Greater Accra

Share of youth population: **18%**
Share of youth market: **24%**

Central

Share of youth population: **9%**
Share of youth market: **9%**

* UN DESA (2017)

** Based on % of young people (15–24) of both sexes who report watching TV at least once a week.
Sources: UN DESA (2017); DHS Program (2014a)

2.2 SECTOR OVERVIEW

Broadcasting in Ghana is predominantly national in scope, in contrast to a country like Nigeria, which is more fragmented.

Terrestrial operators vary in terms of national coverage (see Figure 3), whereas Pay-TV Satellite operators potentially have national coverage, although costs prohibit widespread access.

“The same feed I’m receiving in Accra, is the feed they’re receiving and seeing in Kumasi, and in the northern regions as well. So, Ghana is very national in its broadcast, unlike more developed markets, where you have your broadcast limited to municipal regions.” Media Expert: Ghana

A diverse television sector approaching full digital transition

Toward the end of 2017, there were 53 operators on air in Ghana. These comprised a mix of analogue and digital terrestrial, cable and satellite. Several terrestrial broadcasters are simulcast (digital and analogue) as they navigate the ongoing digital transition.

The digital transition is opening up the sector in a manner comparable to Kenya, which has already achieved full switch-off:

“The migration from analogue to digital has also opened up the TV landscape for more content. However, that has not been fully established, and the deadlines have not been clearly stated yet. So we still have a lot of local players broadcasting in analogue.” Media Expert: Ghana

Free-to-air dominates the sector, with a range of satellite and terrestrial opportunities available (see Table 1).

Satellite operators are most concentrated in urban hubs such as Accra and Kumasi, increasing competition in cities. In rural areas, by contrast, terrestrial television is much more common (NCA, 2017).

2.3 ACCESS

Greater Accra and Ashanti are the two main youth audience hubs

Ghana’s weekly watching audience is heavily concentrated in the Ashanti and Greater Accra regions. Together, these two regions make up 45% of the total estimated youth market.

In Greater Accra especially, weekly watching is much more commonly reported by young people compared to other regions, with 82% of males and 73% of females watching television at least once a week (DHS, 2014a).

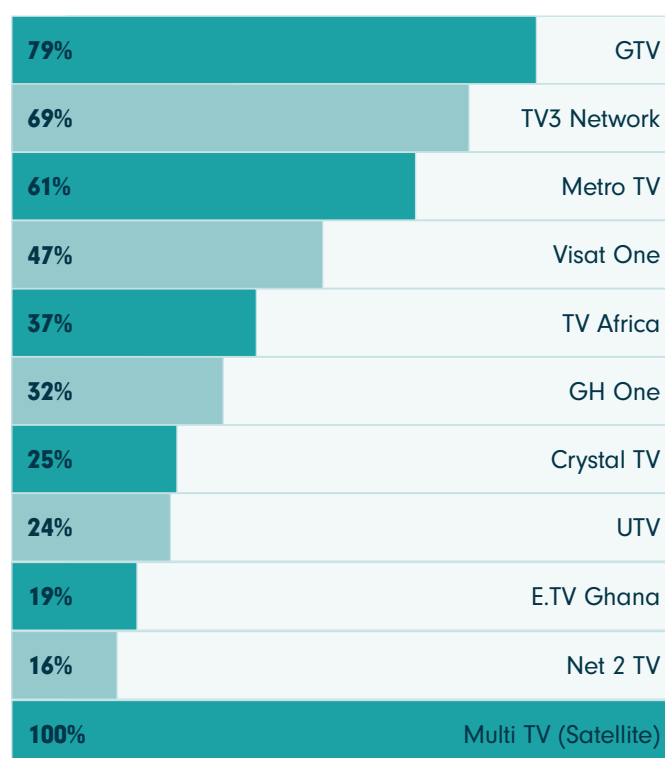
Watching TV at least once a week is most common in urban areas. 72% of males and 67% of females in urban areas do so, compared to 46% and 31% in rural areas (DHS, 2014a).

Regional variations in reported levels of weekly watching by gender

In the majority of zones, weekly watching ratios favor males. Only in the Upper West and Northern zones is this not the case. In all regions other than the Northern and Upper West, over half of young males watch television once a week (DHS, 2014a).

Greater Accra has the highest percentage of females watching at least once a week (73%). In the Upper West, females are more likely than males to watch at least once a week (45%vs.35%)(DHS,2014a).

FIGURE 3. ESTIMATED NATIONAL COVERAGE OF BROADCASTERS IN GHANA



IMP (2013)

TABLE 1. TOP CONTENT/GENRE CONSUMED AMONG USERS AGED 15–24 ACROSS PLATFORM

No.	Type of TV service	Authorised stations	Stations on air	Stations not on air
1	Analogue Terrestrial TV ¹	21	15	6
2	Digital Terrestrial Pay TV (service only)	1	1	0
3	Digital Terrestrial Pay TV (service and frequency)	5	4	1
4	Digital Terrestrial Pay TV (network only)	0	0	0
5	Digital Terrestrial Free-To-Air TV Program Channel (Nationwide Coverage)	23	4	19
6	Digital Terrestrial Free-To-Air TV Program Channel (Regional Coverage)	4	0	4
7	Digital Terrestrial Radio Service on TV Multiplex	0	0	0
8	Satellite TV Broadcasting (Pay TV direct-to-home bouquet)	8	5	3
9	Satellite TV Broadcasting (Free-to-air direct-to-home bouquet)	10	2	8
10	Satellite TV Broadcasting (Free-to-air direct-to-home single channel)	55	21	34
11	Digital Terrestrial Pay TV additional services (e.g teletext, etc)	0	0	0

NCA (2017)

Age-related trends common for both genders

Males aged 20-24 are more likely to watch television at least once a week, compared to 15-19 year olds. The disparity is most marked in the Volta, Northern and Upper West regions. In the Eastern region, the reverse is true (DHS, 2014a).

Females aged 20-24 are consistently more likely to watch at least once a week compared to the younger subgroup (DHS, 2014a).

2.4 OWNERSHIP

Highest in urban areas, with significant regional variation

Television ownership is much more likely in urban compared to rural households. 74% of urban households report ownership, compared to 34% of rural households.

In Greater Accra, household ownership of television is 83%. In the Upper East, by contrast, it is 33% - the lowest rate of ownership in the country (see Figure 4).

Communal watching of television is a popular activity in rural communities

Like in other countries investigated, communal watching is particularly important among rural communities, which often share a single television set.

“TV... is very communal. Communal in the sense that it can serve as much as three households [or be watched] in a viewing center. [These] centers are very popular in the communities.” Media Expert: Ghana

2.5 PATTERNS

Television seen as a leisure activity

As a result, viewing patterns are often dictated by daily routines and roles, which differ depending on locality and gender.

“One thing that has come through in my work quite clearly is the difference between the way young women and young men, girls and boys utilize their time, the expectations and responses and the views they might have inside the home... And in general terms, girls have much less time for leisure activities like watching TV... TV is really only for those who have time to do so.” Development Expert: Ghana

Between 6pm and 10pm is prime time

Between 6pm and 10pm is the period of highest potential reach, with around 80% of the national audience tuning in (see Figure 5).

News programs are the most watched genre during prime time, suggesting a skew towards older viewers (IMP, 2013).

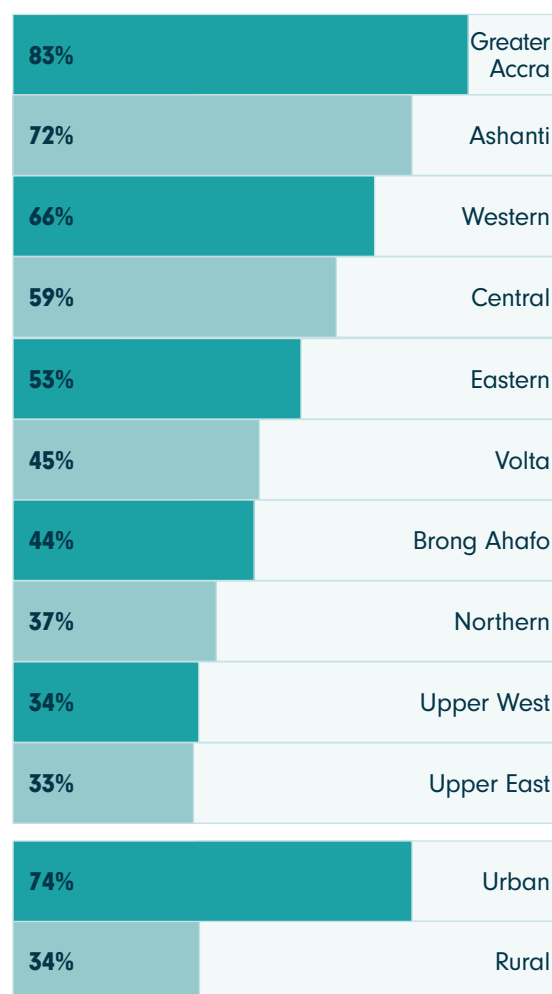
Daily television schedules reflect varying consumption patterns

In the morning between 6am and 9am, viewing is dominated by a range of ‘good morning shows’.

Between 12pm and 5pm, there is a mix of entertainment content – predominantly telenovelas – and news programs.

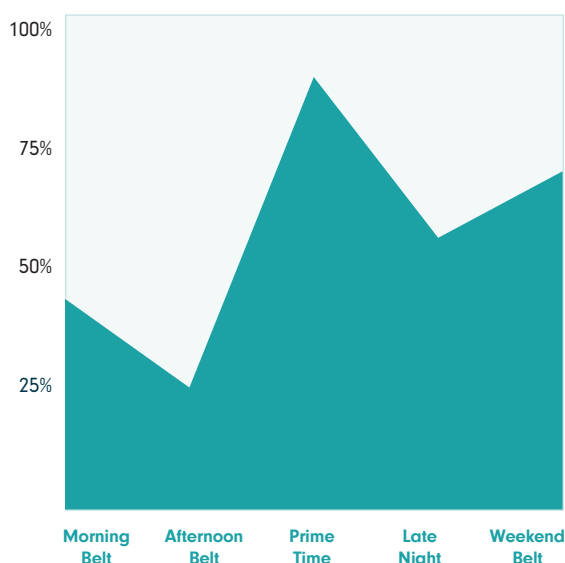
During prime time, news programming dominates, whereas late night television is a mix of late night news, movies and celebrity content. Weekend viewing data indicates a spike in movies, entertainment and music content (IMP, 2013).

FIGURE 4. PERCENTAGE OF GHANAIAN HOUSEHOLDS THAT REPORT OWNING A TELEVISION



DHS (2014a)

FIGURE 5. PERCENTAGE OF TOTAL POTENTIAL AUDIENCE TUNED IN



IMP (2013)

2.6 PREFERENCES

A competitive market with three consistent leaders

United Television Ghana (UTV), AdomTV and TV3 lead the television market in terms of audience share (see Table 2).

Of these, TV3 has the greatest percentage (62%) of viewers aged 15-35. Only a third of UTV's audience are 15-35 (IMP, 2013).²

Popular channels offer a range of programs covering different genres, yet programming is targeted at older age groups

UTV covers news, drama and telenovelas, while Adom TV, its immediate competitor, also covers a variety of news and entertainment content, but with a greater focus on Ghanaian tradition, culture and local films.

Available data nevertheless points to a lack of broadcaster attention paid to younger audiences (10-19) (see Figure 6).

Young Ghanaians are avid consumers of popular culture across multiple media

Asked to identify their personal interests as part of the GWI mobile survey³, music (58%), films (46%), games (45%), books (43%) and television (35%) were all among the top 10 responses (GWI, 2017).

Ghanaian's commitment to religion reflected on-screen

Ghana is one of only two countries globally in which young adults (below 40) are more likely than the older generation to identify religion as important to them (Pew, 2018). As a result, religious programming is both a competitive and popular genre.

"There are a couple of areas where there is a lot of engagement, [which are] related to what takes priority to people more generally and the culture... Ghana is a heavily religious country, and there's a lot of interesting TV programming going on in that space." Development Expert: Ghana

Digital transition improving service of local language content

Benefits associated with the digital transition, such as increased broadcaster capacity and signal quality, have made it easier for broadcasters to meet the demand – in rural areas especially – for local language content.

"Because of the advent of digital transmission... We now have stations that are offering purely local languages. And what we are seeing is, despite the fact that English is predominantly the lingua franca, there will be spikes in viewership with the local language. People are proud of the local content."

Media Expert: Ghana

Telenovelas are cutting through cultural and language barriers

In the entertainment space particularly, Ghanaians consume a range of programs produced in other countries – both African, and from elsewhere.

"There's all the content coming through from Nollywood in terms of things like films and TV series, but also these telenovelas that are imported from Latin America that are also hugely popular." Development Expert: Ghana

In areas where local languages are also preferred, dubbing is a common practice. Organizations are already capitalizing on the cache of soap opera entertainment as a way of improving reach and engagement among rural and less educated communities.

"In Ghana you will see a Mexican telenovela that is being voiced over in Ghana local language. This has a high affinity with the local community, and brands are taking advantage of this opportunity." Media Expert: Ghana

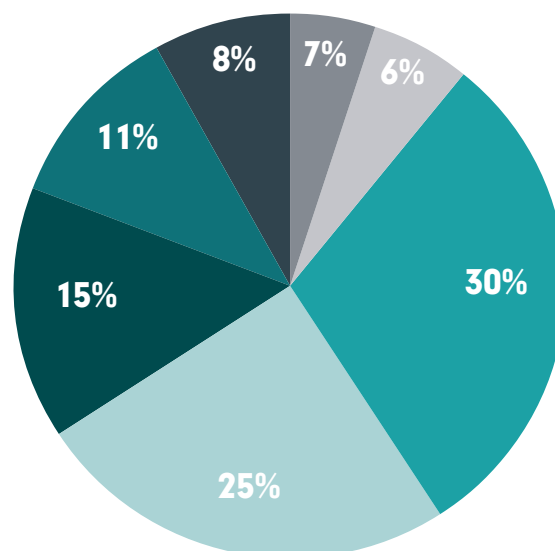
TABLE 2. GHANA TV AUDIENCE SHARE, Q4 2016

Station	Share
UTV	19%
Adom TV	17%
TV3	15%
Joy Prime	11%
GTV	8.5%
Joy News	8.3%
Gh One	7.7%
Metro TV	5.8%
Viasat One	5.2%
Max	0.3%
Other	1.8%

Geopoll (2017). Figures greater than 10% have been rounded to the nearest whole.

FIGURE 6. PROGRAMS CATERED TO SPECIFIC AGE GROUPS

● Across All ● 20-29 YRS ● 40-49 YRS ● 50-59 YRS
● 10-19 YRS ● 30-39 YRS ● 60 and above



IMP (2013)

3. Digital

3.1 SECTOR OVERVIEW, ACCESS AND DEVICE OWNERSHIP

Internet access is high, but unreliable outside of urban hubs

3G coverage of the population in Ghana is 80%, which is significantly higher than the continent average of 59% (ITU, 2017c).

“When we talk about internet, we’re looking at only Accra and Kumasi, out of the ten regions that we have in Ghana. Those two are where you have good infrastructure.” Media Expert: Ghana

In one of Africa’s largest mobile markets, mobile broadband is the primary means of access

Mobile broadband is the prevalent mode of internet access in the country. Mobile phones make up 75% of all web traffic in Ghana (Hootsuite/We Are Social, 2018).

Ghana is one of Africa’s largest mobile markets. Based on current population projections, mobile subscription penetration is 127% (1.27 subscriptions for every one inhabitant), while according to data from Afrobarometer, 84% of 18-25 year olds own a mobile phone (NCA, 2017b; Afrobarometer, 2015).

According to the Pew Global Attitudes Survey, of the 78% of young Ghanaians (18–24) who reported owning a mobile phone in 2015, 40% owned a phone that allowed them to access apps and the internet (2015).⁴

MNOS driving a social media internet

There are six mobile operators in the country, all of which have 3G networks (ITU, 2017c). As in the other markets, social data bundles are key. In 2016, the Ghana National Communications Authority (NCA) identified data bundling as key to rapid growth in the telecoms and broadband sector, and social media bundling particularly as the most recent trend (2016).

Young people most likely to use the internet regularly

Of the 18-25 year olds who participated in a 2015 Afrobarometer survey, 23% in Ghana report using the internet daily, compared to 18% of 26-35 year olds, and only 5% of 36-45 year olds (Afrobarometer, 2015).

Available data indicates gender disparity

In Ghana only 0.6 females aged 18-24 are using Facebook for every 1 male. For 13-17 year olds, gender parity is also 0.6 (Hootsuite/WeAreSocial, 2018).

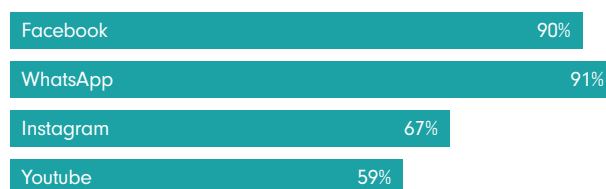
Similarly, whereas 17% of Ghanaian males (aged 18+) reported using the internet every day, only 6.7% of females do the same (Afrobarometer, 2015).

3.2 PREFERENCES

Social media networks by far the most prevalent, popular and heavily-engaged digital platforms

When asked what types of apps they used, 93% of 16-24 year olds in Ghana reported social network apps, while 94% reported chat/instant messenger apps. The next most commonly used apps were games (59%) and music (49%) (GWI, 2017).

The popularity of social media brands is also reflected in the reach of brands like Facebook, WhatsApp and Instagram in Ghana. When asked which social networks they used regularly, 16-24 year olds in Ghana who took part in the GWI mobile survey responded:



(GWI, 2017)

Young Ghanaians are also more likely to actively contribute to and engage with social media platforms, compared to the average of 44 countries surveyed by GWI. 85% of young Ghanaian WhatsApp users and 78% of Facebook users report actively contributing to the platform (GWI, 2017).

Entertainment news the focus of digital consumption

A diverse range of bloggers, influencers and media houses are currently serving the demand for online entertainment news and the latest updates across diverse interests.

“Media houses have their own news sites - a popular one is MyJoyOnline⁵. And you have popular bloggers like Ameyaw Debrah⁶, as well as others in different categories: technology, gospel music, food...”

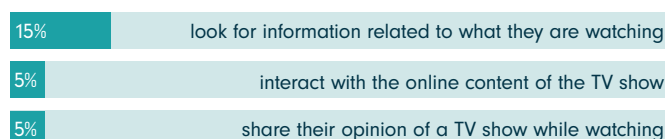
Media Expert: Ghana

For those with access, second-screening is an emerging behavior

Of those who watched television recently, 73% report second-screening using their mobile phones (GWI, 2017).

44% do so to chat to friends, while 40% do so to check social media networks (GWI, 2017).

In terms of interacting with watched content:



GWI (2017)



4. Cultural Observations

4.1 ATTITUDES TO THEIR COUNTRY

Integrating global consumption with local expression

Like the young populations of the other countries investigated, Ghanaian youth, while being avid consumers of international and, in particular, Western fashions, content and trends, remain proud of their heritage.

Integration of their increasingly globalized consumption preferences with elements of local culture is a hallmark of their self-expression. As one expert put it:

“The young people are very fashionable, they are consuming Western content, they know the latest trends and styles. [But] there’s a sense of pride when you are able to integrate the latest styles with local flavors. They are very proud of their own local content. It’s a pride in being able to bring the international scene home and adapt it.”

Media Expert: Ghana

Optimism for the future, despite belief in lack of opportunity

According to data presented in the Global Youth Wellbeing Index (GYWI), 76% of young Ghanaians believe that their government does not care about their wants or needs (2017). This may be related to the prevalent perception among those aged 18-35 (67%) that government accountability and transparency is an issue for Ghana (GSS, 2017).⁷ Experts expressed a similar view of young Ghanaian’s relationship with leaders:

“The leaders are saying one thing, have promises for the youth. However: the youth are beginning to find and make their own way -taking advantage of opportunities, especially with the advent of the internet. That entrepreneurial spirit is there. And they are using it to take advantage of the data of technology to help promote their entrepreneurial spirit.”

Media Expert: Ghana

An additional 63% of those surveyed by Global Shapers reported that lack of opportunity and employment was a serious issue facing Ghana – the highest percentage of the four countries investigated, despite Kenya’s more severe youth unemployment rates (2017).

Despite these perceived obstacles, however, Ghanaian youth are optimistic about the future, with 88% of respondents saying their standards of living will be better than their parents (GYWI, 2017).

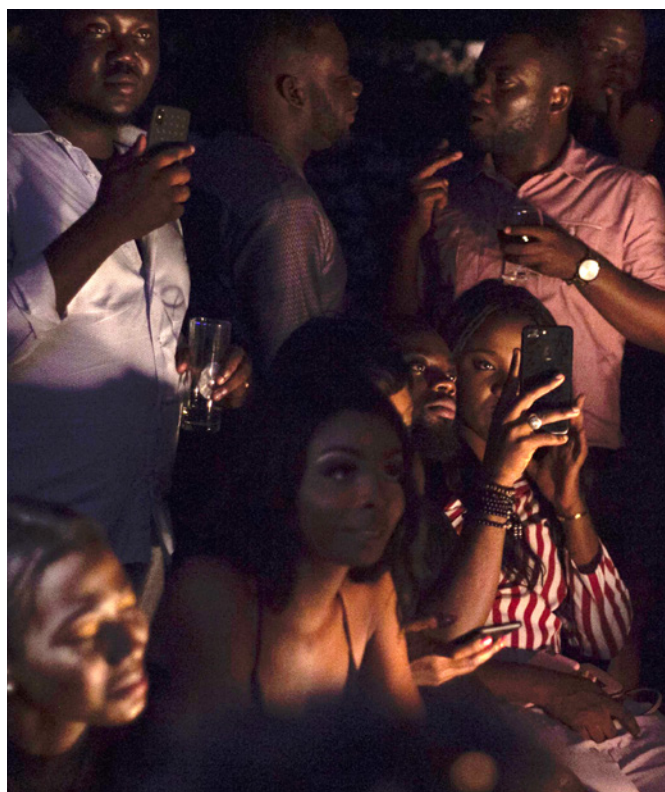
Corruption a big concern, but improved education also seen as a solution to inequality

When asked what they thought were the most important factors contributing to inequality, 67% of Ghanaians aged 18-35 pointed to corruption and lack of transparency (GSS, 2017). However, an additional 41% identified inequality in access to quality education as a factor (GSS, 2017).

Experts also commented on how lack of employment and poor training in the skills demanded by the job market constitute cross-cutting barriers for young Ghanaians:

“Unemployment is a huge issue, [because of] the interception between the educational opportunities and quality of education they’ve been able to access and then what that means for their economic lives or their economic reality. In both rural and urban areas, young people just don’t have the skills, nor the work opportunities available.” Development Expert: Ghana

Citizen hearings conducted by Youth Advocates Ghana (YAG) found that poor access, high associated costs and learning resources were serious issues hindering the achievement of the Sustainable Development Goal for Education (2017). Inadequate attention paid to vocational and technical education was also identified as an issue. According to the findings, participants unanimously cited Ghanaian society’s negative perception that those who attend vocational and technical courses are inferior (2017).



4.2 COMMITMENT TO SOCIAL CHANGE

Young Ghanaians see themselves, not leaders, as responsible for change

Of the 18-35 year olds surveyed by Global Shapers, 63% identified regular people as those responsible for making the world a better place, compared to only 22% who identified governments (2017).

Young Ghanaians are aware of development priorities and consider themselves active in achieving positive outcomes

Furthermore, 82% of Ghanaians aged 18-35 were aware of the Sustainable Development Goals (SDGs), while 68% considered themselves in some way active in helping achieve them (GSS, 2017).

Young Ghanaians are socially conscious in their interests and behaviors

Young Ghanaians show remarkable levels of social consciousness, with 27% identifying volunteer and charity work as a personal interest (GWI, 2017). Data presented in the GYWI from Gallup found that the rate of youth volunteering in Ghana was 25% - 3% higher than the index average of 20% (GYWI, 2017).

Finally, 86% of 18-35 year olds surveyed by Global Shapers said they would be willing to change their lifestyle to protect nature and the environment (GSS, 2017).



4.3. ROUTES TO YOUTH EMPOWERMENT

Entrepreneurship perceived as vital to empowerment, and a common interest of the young

Of the 18-35 year olds surveyed, 53% identified start-up ecosystems and entrepreneurship as factors contributing to their empowerment, while 58% identified equal access to opportunity as being most important to their sense of freedom (GSS, 2017).

This is reflected in the entrepreneurial spirit of Ghanaian youth – Ghanaians aged 16-24 show high interest in business (35%) and personal finance (25%) (GWI, 2017).

Access to information is also important. In the Global Shapers survey, 47% of 18-35 year olds identified access to the internet as an important factor contributing to youth empowerment, while 43% similarly identified free media and social media as a factor (GSS, 2017).

Religion is a major part of young Ghanaians lives

Ghanaians under 40 are more likely to be affiliated with religion and to acknowledge its importance in their lives, compared to 85% of older adults (Pew, 2018). This goes against the global pattern of decreasing religiosity in successive generations. Ghana and Georgia were the only two countries in which younger adults say that religion is important to them.

Young Ghanaians more likely than other country's youth to recognize the value of senior role models

In Kenya, Nigeria and Zimbabwe, an average of 7% of 18-35 year olds identified senior role models as important for youth empowerment. In Ghana, by contrast, 22% of young people did so (GSS, 2017).

¹These stations have their authorizations replaced with Digital Terrestrial Free-To-Air Television Program Channel (Nationwide). Upon payment of all outstanding fees, these entities are added to the said Digital Category and are therefore counted twice in total.

²Adom TV was not included in the IMP 2013 study, meaning comparable data is not available.

³Base: 5.26M respondents for Ghana; Base: 633M respondents worldwide

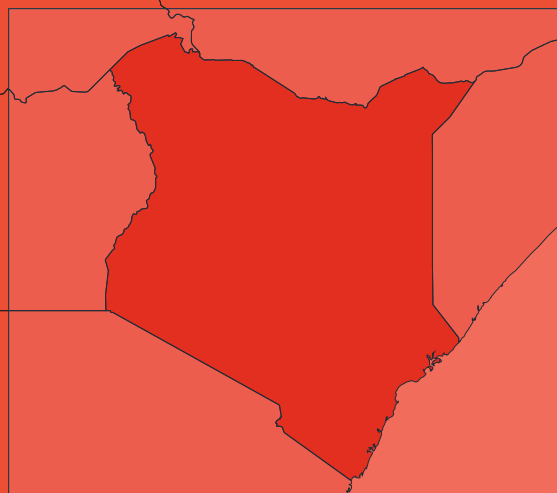
⁴Base: 249 respondents

⁵<https://www.myjoyonline.com/ghana-news/>

⁶<https://ameyawdebrah.com/>

⁷Base: 278 respondents for Ghana. Base: 31,495 respondents worldwide.

Kenya



KENYA

- 1.0 Demographics & Development
- 2.0 TV
- 3.0 Digital
- 4.0 Cultural Observations

1. Demographics & Development

1.1 DEMOGRAPHICS

Africa's sixth largest youth population

Kenya has the 6th largest youth (15-24) population in Africa, and 3rd largest in Eastern Africa: 10,356,000. This represents 10% of the total Sub-Saharan youth population, and 20% of the total Kenyan population (UN DESA, 2017).

Slower rate of growth than other Sub-Saharan youth populations

The young population is growing at a rate of 1.5%, as compared to Sub-Saharan Africa's overall rate of 2.1%. By 2030, the Kenyan youth population is projected to grow by 22%, numbering 13,344,000 (UN DESA, 2017).

Significant migration to urban hubs, particularly Nairobi

The majority of Kenyan youth live in rural areas. However, the country's rate of change for its urban population is 4.2%, which is higher than the Sub-Saharan overall rate of 3.7%. Current forecasts indicate that the rate of urban change in Kenya will remain higher than the Sub-Saharan average until beyond 2050 (UN DESA, 2018).

There is significant migration by Kenyan youth into urban areas, especially the capital and Kenya's largest city, Nairobi. While 74% of males and 73% of girls aged 10-14 live in rural areas, 44% of males and 46% of females aged 20-24 are in cities. While only 6% of males and females aged between 10-14 live in Nairobi, by ages 20-24 this figure becomes 13% for males and 15% for females (see Figure 1).

This urban migration begins at an earlier age for females, 33% of whom are living in cities between the ages of 15-19, compared to only 27% of males.

1.2 DEVELOPMENT

Young Kenyans increasingly familiar with the internet

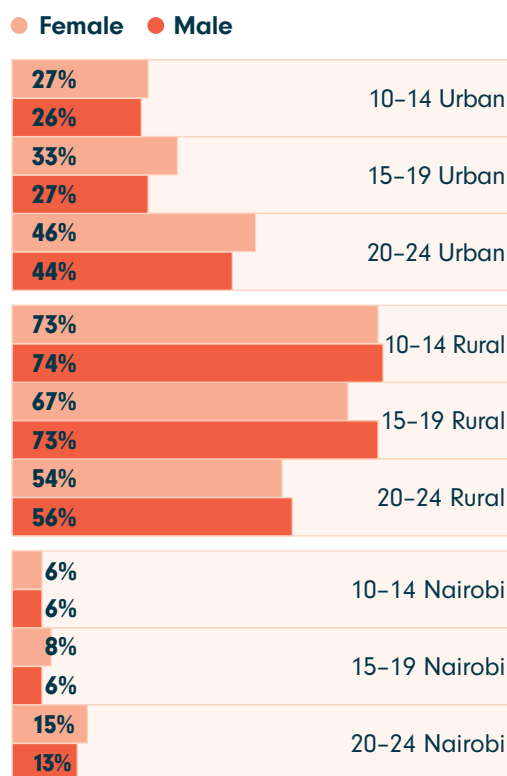
In 2013, Kenya had among the highest percentage of digital natives, second only to Zimbabwe (see Figure 2).

Significant drop off in the transition to secondary education, as well as doubts about its suitability to the job market

Gross rate of enrolment in secondary education is lower than in Ghana, despite good primary education coverage across both countries.

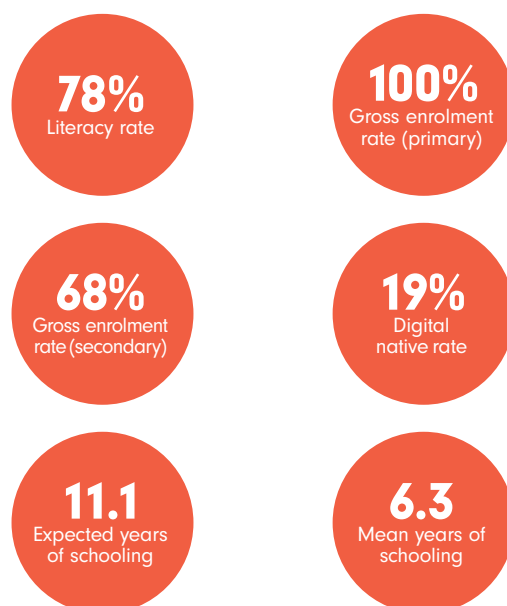
Equally, there are concerns about the quality of education young Kenyans of secondary school age receive. According to the British Council, "large numbers of young people are unable to perform basic job-seeking tasks", while of those who are in work, "62% [said] that the education they had received did not match at all the skills required in their jobs" (2018).

FIGURE 1. PERCENTAGE OF YOUTH LIVING IN URBAN HUBS



UN DESA (2018); UNFPA (2018b)

FIGURE 2. KENYA KEY EDUCATION INDICATORS



UNDP (2016); ITU (2013)

2. TV

2.1 MARKET SIZE PROJECTIONS

National Youth Population: 10,356,000*

Estimated Market Size: 4,503,537**

Central

Share of youth population: **11%**
Share of youth market: **16%**

Eastern

Share of youth population: **15%**
Share of youth market: **13%**

Western

Share of youth population: **12%**
Share of youth market: **9%**

Nyanza

Share of youth population: **14%**
Share of youth market: **10%**

Rift Valley

Share of youth population: **26%**
Share of youth market: **21%**

Nairobi

Share of youth population: **10%**
Share of youth market: **19%**

North Eastern

Share of youth population: **2%**
Share of youth market: **2%**

Coast

Share of youth population: **10%**
Share of youth market: **10%**

*UN DESA (2017)

**Based on % of young people (15-24) of both sexes who report watching TV at least once a week.
Sources: UN DESA (2017); DHS Program (2014b)

2.2 SECTOR OVERVIEW

Successful digital television transition contributing to Kenya's rich television sector

Kenya's television sector comprises a mix of digital terrestrial, cable and satellite operators, as well as mobile operators distributing over the internet via internet protocol television (IPTV). According to President Kenyatta, the digital migration has increased the number of television stations from 14 in 2013 to 55 in 2015 (BBC Media Monitoring, 2016). The share of the total youth market distribution by province is shown in Section 2.1.

Free-to-air (FTA) broadcasting is still the primary access method in Kenya. Of households that own a TV, 85% access content primarily via FTA, and 15% do so primarily via Pay-TV services. Moreover, the majority of Pay-TV households are located in main cities (CAK, 2016b).

From a licensing perspective, commercial FTA is the most prevalent form of TV broadcasting in Kenya, with 66 stations licensed in the 1st quarter of 2017/18 (see Figure 3). The boom in commercial FTA is due to Kenya's successful digital migration, which has vastly increased the diversity and quality of FTA television in Kenya, by allowing a range of private players to enter the market.

For channels requiring a subscription, terrestrial television subscribers constitute 76% of the market; satellite, 21%; and cable, 3%. This distribution is due to the affordability of terrestrial versus satellite and cable subscriptions (CAK, 2017).

Regulation increasing in the FTA space

CAK's 2015 Programming Code introduced new regulations for FTA channels, with those channels failing to air 40-60% local content in their programming risking closure. Regulation on appealing for donations is also expected to hurt religious channels, which currently make up 20% of all FTA programming (BBC Media Monitoring, 2016; See Figure 4).

Music is the most prominent type of program aired on FTA in Kenya, accounting for 45% of genre distribution. After religious programming (21%) and talk shows (18%), entertainment genres including reality, drama and comedy make up only 7% of FTA programming.

An increasingly diverse range of local language channels, yet currently restricted to urban hubs

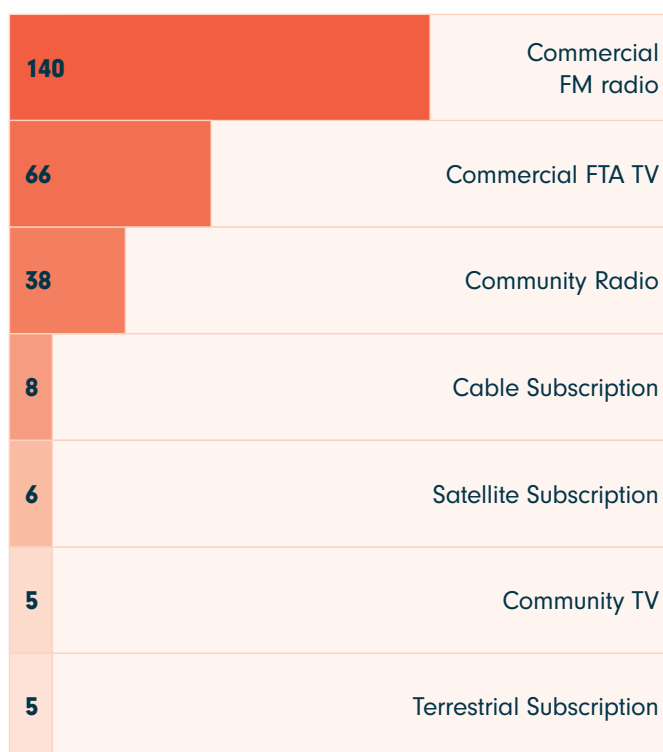
The achievement of digital migration has facilitated the establishment, growth and availability of television stations broadcasting in local languages on numerous digital platforms. However, most of these stations have limited budgets and the quality of their shows is poor.

Njata TV (self-proclaimed fastest growing digital television channel in Kenya); Lolwe TV and Baite TV are all examples of this emerging trend towards digital local language channels.

While their reach is limited, and advertisers have minimal engagement with them, these stations are expected to become popular in a country with entrenched ethnic identities (BBC Media Monitoring, 2016).

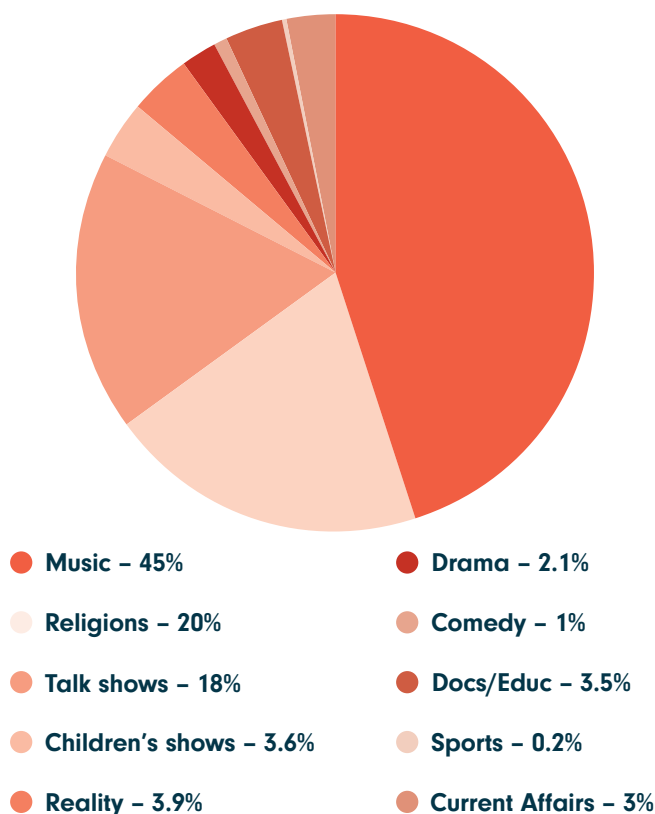
According to BBC Media Monitoring, their main audiences will be those in urban centers with access to electricity (2016).

FIGURE 3. NUMBER OF BROADCASTING SERVICE PROVIDERS PER LICENSE CATEGORY (JUL-SEP 2017)



CAK (2017)

FIGURE 4. DISTRIBUTION PER GENRE OF LOCAL PROGRAMMING AIRED BY FTA TV STATIONS (JUL-SEP 17)



CAK (2017). Figures greater than 10% have been rounded to the nearest whole.

2.3 ACCESS

High access, but television viewing predominantly urban

According to BBC Media Action, between 81% and 89% of adults have access to television (2017a).

However, regular television viewing is a predominantly urban activity. 68% of males and 53% of females in urban areas report watching television at least once a week, compared to 39% and 18% in rural areas (DHS, 2014b). This disparity is attributed by experts to the prohibitive costs of television:

“TV is expensive, so available mainly in large urban areas or in particular centers in rural areas. You’ll see restaurants putting TVs and making it available to their clients, but outside the capital and really large urban centers, TV access in the house isn’t common.” Development Expert: Kenya

Where access is possible in rural areas, the channels are the most basic available, again due to costs. A lack of substantial, concentrated rural markets means that commercial operators focus mainly on urban areas and the more economically and socially privileged.

“For free or for very basic watching fees, it’ll be local channels, most of them showing news programs and some locally-produced soap operas. So it’s not a very rich content. The [commercial] companies would focus primarily on areas with high concentration of middle and upper-class populations, who can afford to pay for TV.”

Development Expert: Kenya

Age/gender equality of access

In all provinces other than Nairobi, there are significant disparities in the percentage of males who watch television at least once a week compared to females, with males being more likely to do so. In the capital, however, females are marginally more likely to watch television once a week than males (81% vs. 79%) (DHS, 2014b).

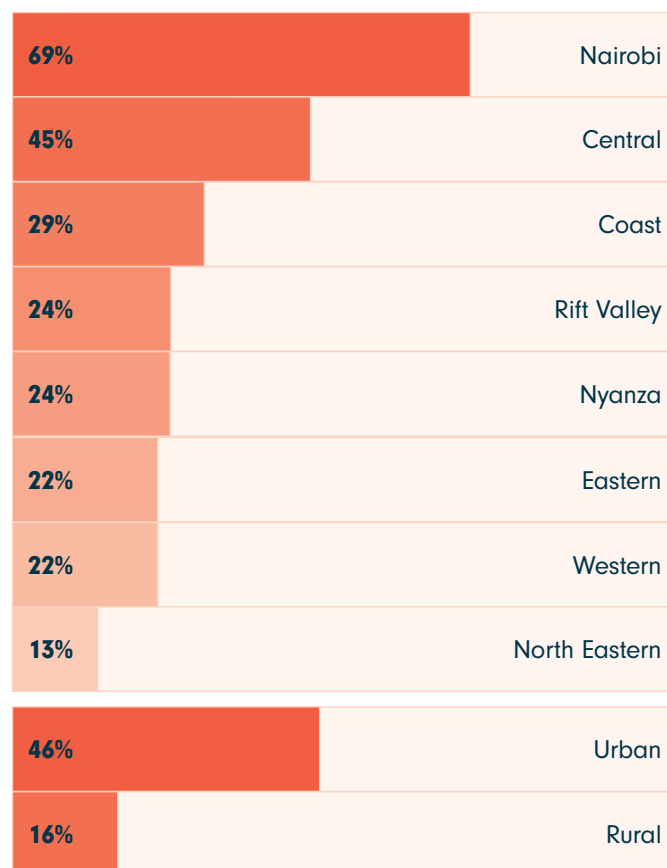
The impact of age on weekly watching varies by province. In Nairobi, the Rift Valley and the Central Province, a greater percentage of males and females aged 20-24 report watching at least once a week, compared to 15-19-year olds (DHS, 2014b).

2.4 OWNERSHIP

Highest in Nairobi, but generally low – even in urban areas

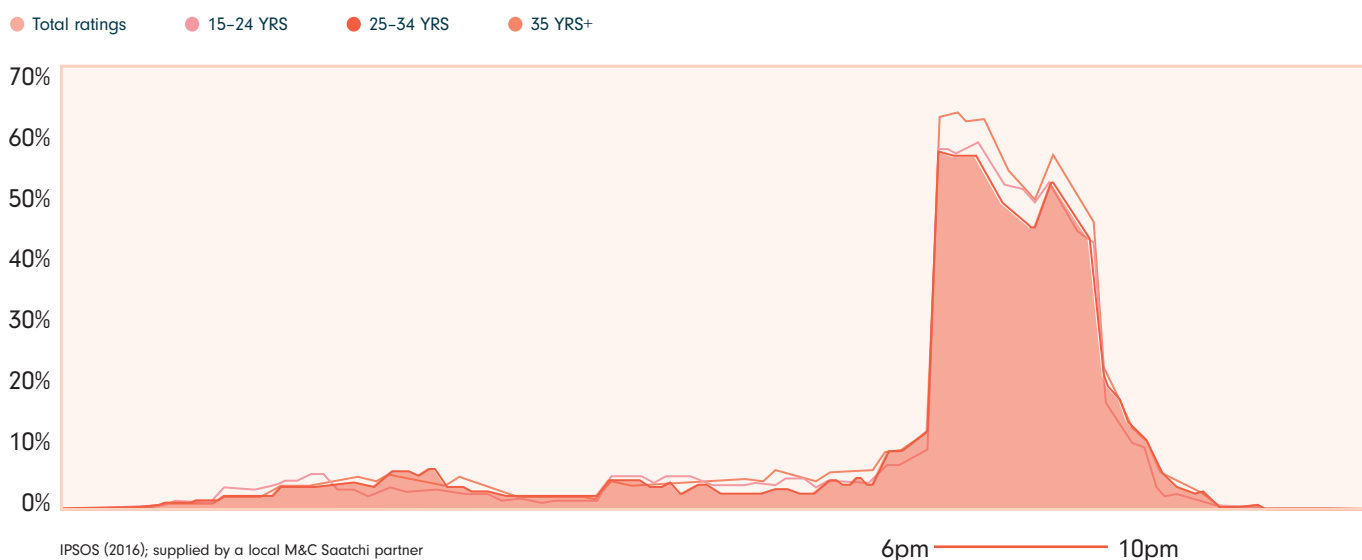
While 69% of households in Nairobi own a television, in urban areas nationally ownership is only 46% (see Figure 5). Poor electricity is the main reason for low levels of rural ownership, as lack of power renders television sets frequently useless.

FIGURE 5. PERCENTAGE OF KENYAN HOUSEHOLDS THAT REPORT OWNING A TELEVISION



DHS (2014b)

FIGURE 6. KENYA AVERAGE DAILY TELEVISION VIEWERSHIP FIGURES — 2016



2.5 PATTERNS

Age and gender closely linked in terms of viewing opportunities

Patterns of viewing are closely tied to the life stages of young people. Experts indicate that these are likely to vary for males and females, with young men, in particular, having more leisure time to watch television.

“With age, the life stages of young people change. Young boys would have more free time and higher mobility, so they would be able to find time to watch TV... Girls, until they graduate and move out of the household, generally carry a lot of the household chores, take care of their male siblings, and in addition, they have the homework that boys have, so they just won’t have time for watching TV that much.”

Development Expert: Kenya

Based on available data, 6-10pm is television audience prime time

The majority of television audiences in Kenya tune in between 6-10pm (CAK, 2017). For 15-24 year olds, the steepest surge in viewership numbers occurs at 7pm, peaking at around 60% of the total 15-24 audience (see Figure 6). By 8pm, viewership numbers begin to decline, with a sharp drop-off at 10pm.

Youth viewing patterns largely mirror older subgroups viewing

There are clear similarities in the viewing patterns of younger and older audiences, which may result in competition for control over what is watched at these times. Observations by experts indicate that parents, especially fathers, tend to have authority over what is watched during family viewing. As a result, young people living at home may not be choosing what they want to watch during prime time.

“Because it’s expensive and because it’s not common, it’s mostly adults who will dictate what gets watched. In the general social structure of the household, it would be always the male in the household who will say what the family is watching.” Development Expert: Kenya

TABLE 1. KENYA TV AUDIENCE SHARE, Q4 2016

Station	Share Q3, 2017	Share Q4, 2017	Share Q1, 2018
Citizen	28%	27%	22%
KTN	14%	13%	13%
NTV	11%	11%	11%
KTN News	11%	12%	9%
K24	6%	6%	8%

Geopoll (2017); see also KFC (2013)

2.6 PREFERENCES

While there is a range of data on Kenyan audiences available from a variety of sources, data on young people specifically is limited.

Small number of national broadcasters dominate the market

Citizen TV, KTN and NTV are the main channels in Kenya, with Citizen TV leading (see Table 1). All three are privately owned and provide a diverse mix of programming and genres. As all are FTA, they are required to meet a quota of local programming.

Private broadcasters consistently outperform the state-owned Kenya Broadcasting Corporation (KBC), which lags in both presentation styles and audience ratings (BBC Media Monitoring, 2016).

According to research for the Kenyan Film Commission (KFC), 59% of survey respondents cited Citizen TV as their favorite channel. The majority of these were reportedly between 18-29 years old, indicating a strong preference among youth (2013). However, young Kenyans’ preference for the city also means a preference for NTV and KTN, which are perceived as “urban-based”.

Avid consumers of popular culture across multiple media platforms

Asked by GWI to identify their personal interests, music (50%), films (41%), gaming (31%), books (33%) and television (31%) were all among the top 10 responses from young Kenyans aged 16-24 (2017).¹

Music, sports and channels airing African content all popular among young people

KFC findings show that music channel Kiss TV (70%), African content channel Classic TV (60%) and Super Sports (62%) were all watched by the majority of under 30s surveyed (2013).

“Every youth likes music, that is, live music shows, followed by sports for the young male, followed by reality TV shows and soaps, which are more female.”

Media Expert: Kenya

The study also found that, exclusive of news, 49% of survey respondents identified locally produced programs as their favorite shows.

Young Kenyans support their own by engaging with youth-centric content

Experts observed that young Kenyans engage more with content and personalities that they can relate to, and that matches their reality.

“Any type of content that showcases young people in different institutions is hugely popular. The youth audience tries to support their own, so if there is a DJ who’s trying out a sound and he is within the age group of the audience, they will be highly supportive and they will be watching their music videos, TV interviews - anything associated with that person.” Media Expert: Kenya

3. Digital

3.1 SECTOR OVERVIEW, ACCESS AND DEVICE OWNERSHIP

High broadband population coverage, yet concentrated in urban areas

According to a CAK report, 78% of the Kenyan population is covered by 3G, yet geographical coverage is only 17% (CAK, 2016b).

This contrast is due to a focus on building urban internet infrastructure: currently every county in Kenya (47 total) has at least one population center with 3G coverage, except Isiolo County which has zero percent 3G coverage (CAK, 2016b).

Urban males over twenty the most likely to consume content online

Location, age and gender all impact likelihood of access to and consumption of online content.

“In the western world, it’s teenagers that are the biggest consumers of the internet. In Africa, it’s people older than 20, because they are likely to generate their own income, whether formally or informally, and also have control of their income... And that, again, would mostly apply to males. So across the board, it’s urban males, older than 20, who would be the primary consumers.” Media Expert: Kenya

Mobile broadband the primary mode of access

Mobile phones make up 83% of all web traffic in Kenya (Hootsuite/We Are Social, 2018). In addition, across all other devices capable of accessing the internet (e.g. desktop computers, tablets), Kenyan youth scored low on the GWI Index (2017). This is further evidence of the dominance of mobile broadband for young people in Kenya.

There are three mobile network operators (MNOs) and three operational mobile virtual networks operators in Kenya, with SAFARICOM having the largest market share in the mobile market (ITU, 2016).²

Smartphones increasingly common, yet a stark social divide between the haves and have-nots

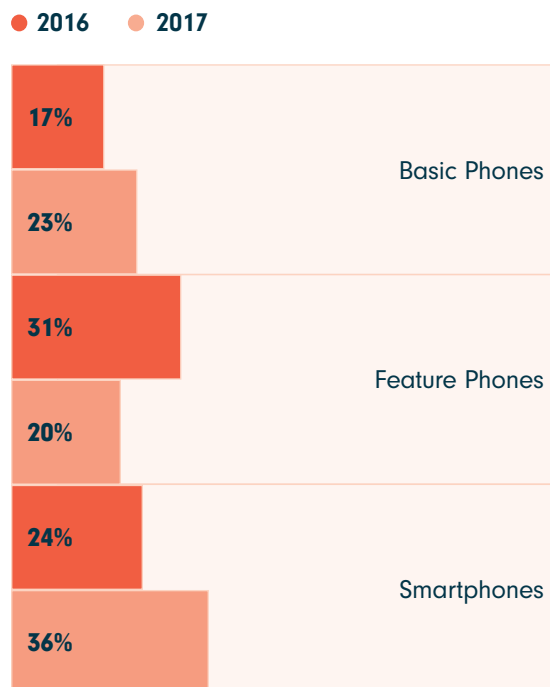
Of the 15-24 year olds surveyed, 73% own a mobile phone (Well Told Story, 2017). Of those, 36% own a smartphone and 20% own a feature phone (Well Told Story, 2017).

Smartphones are increasingly replacing feature phones and are the most commonly owned type of mobile for 15-24 year olds (see Figure 7).

However, experts observe an increasingly pronounced social divide between haves and have-nots:

“Feature phones are dying out, yet there is a split between [smartphone owners and] those who have basic phones, who will belong to different language groups, will live below the poverty line, and will be mostly females living in rural areas.” Development Expert: Kenya

FIGURE 7. SURVEY OF DEVICE OWNERSHIP AMONG 15–24 YEAR OLDS



Well Told Story (2017)
Base (2016) = 2011; Base (2017) = 2,923.



3.2 PREFERENCES

Social media networks by far the most prevalent, popular and heavily-engaged digital platforms

When asked as part of the GWI mobile survey (2017) what types of apps they used, 95% of 16-24 year olds in Kenya reported social network apps, while 94% reported chat/instant messenger apps. In Kenya, the messenger app Telegram is competing successfully with WhatsApp (although it is not listed as an option in the GWI mobile survey).

The popularity of social media brands is also reflected in the reach of brands like Facebook, WhatsApp and Instagram in Kenya. When asked which social networks they used regularly, 16-24 year olds in Kenya who took part in the GWI mobile survey responded:



GWI (2017)

Young Kenyans are also much more likely to actively contribute and engage with social media platforms, with 81% of young Kenyan WhatsApp users and 76% of Facebook users actively contributing to the platform (GWI, 2017).

However, data presented by the Well Told Story group indicates that 40% of young people also report using the internet for things/information other than social networking, and only 6% report using the internet exclusively for visiting social networks (Well Told Story, 2017).

The greater usage of other aspects on the internet by Kenyan youth may be facilitated by deals such as Airtel's Unliminet 20 deal, which gives consumers the ability to keep accessing social networks for free even after their data runs out. Such an option encourages the use of data for non-social activities, by ensuring continued access to social media regardless of data usage.

Personal newsfeeds the focal point of social media use, populated by popular culture and sports celebrities

The top-three activities among social media users are reading a newsfeed (71%), sharing personal photos (63%) and chatting with friends (32%) (Well Told Story, 2017).

The group of key influencers in youth's lives, which they follow on social media, are a mix of artists and sport celebrities, including Diamond Platinum, soccer team Arsenal, Kiriga Team and Octopizzo (Well Told Story, 2017).

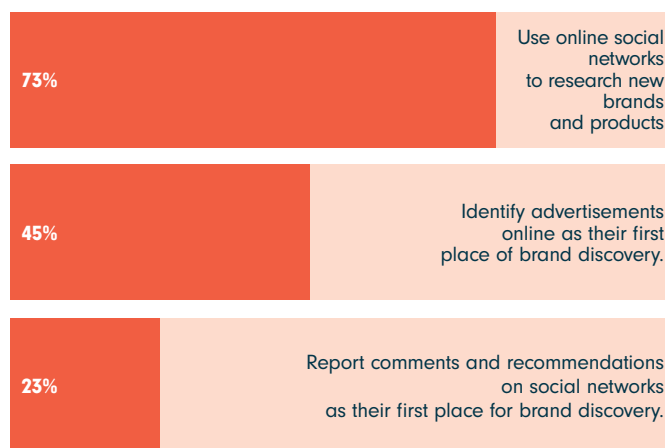
Popular culture and entertainment the focal point of digital consumption

Internet consumption preferences mirror television preferences, with a primary focus on interests such as music, sports, latest fashions and trends.

"Number one consumption for young people is entertainment. They're checking out their favorite DJs, they're checking music online, the boys are into sports... The more college-going youths in their 20s, they're more into online shopping to check what's the latest on fashion. So that's what they use it for." Media Expert: Kenya

Social networks vital tools for discovering and researching new brands

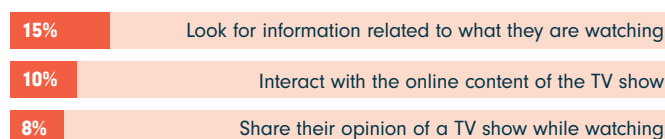
GWI data indicates that, for Kenyans aged 16-24:



GWI (2017)

For those with access, second-screening is an emerging behavior

Of those who watched television recently, 76% report second-screening using their mobile phones. 43% do so to chat to friends, while 38% do so to check social media networks. In terms of interacting with watched content:



GWI (2017)

4. Cultural Observations

4.1 ATTITUDES TO THEIR COUNTRY

Proudly Kenyan, yet cosmopolitan rather than provincial

According to the British Council Next Generation Report, 91% of young Kenyans say they love their country, while 89% say their nationality is their principal source of identity (2018).

At the same time, 38% say they would be willing to emigrate if given the opportunity. For urban youth the rate is 64%, indicating a greater level of cosmopolitan aspiration among those living in cities. In a GWI survey, 37% ranked travel as a personal interest (2017).

Moreover, experts suggest that young people are increasingly drawn to the city – an observation that reflects findings from the population data:

“Young people like whatever is urban-based, even the ones who are outside the urban areas. NTV is most watched because it’s more youth-oriented, unlike Citizen TV which is national, but mass-oriented, so it does a lot of programming in the local Kiswahili language... if your target is the young, you go urban-oriented televisions like NTV and then KTN.” Media Expert: Kenya

Kenyan youth unemployment is the highest in Africa

At 39%, youth unemployment is currently the highest in Africa, and constitutes a major barrier preventing young Kenyans from achieving independence and making use of their skills (British Council, 2018). The same report found that 73% of young Kenyans rely on the support of others, in large part due to the lack of employment opportunities (British Council, 2018).

“Number one is unemployment. They have education, but they don’t have enough work to earn a living, so they depend on their parents. They don’t want to live in the villages, they want to access the cities, but there they find themselves unemployed.” Media Expert: Kenya

Data from the British Council indicates that 67% of young Kenyans identify lack of unemployment opportunities as their main challenge (see Figure 8). This is supported by data from the Well Told Story Group, which found that 44% ranked unemployment as their most pressing issue (Well Told Story, 2017).

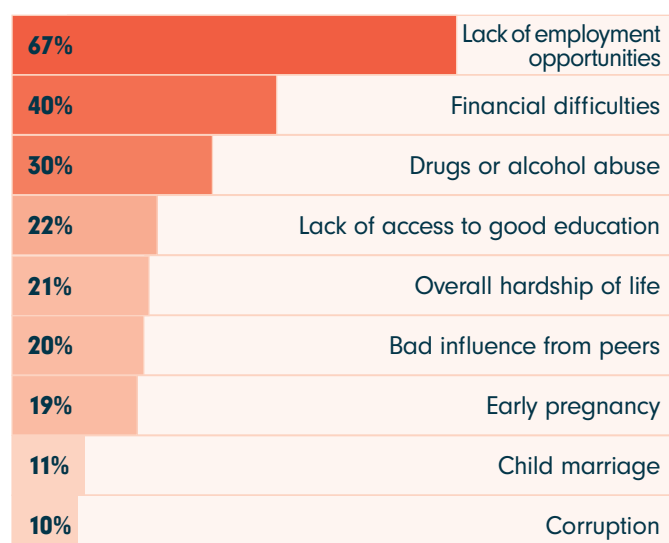
Unemployment is a bigger problem for young females than males: 49% of young women interviewed by the British Council reported being neither in school nor employed, compared to 37% of young men (2018).

Feel excluded by older generations, with a lack of positive role models outside of family groups

According to the British Council report, 49% of young Kenyans feel that their society does not listen to them (British Council, 2018). According to the authors of the Next Generation report, many of them feel that the system is stacked against them, which is understandable given that the unemployment rate is almost triple to that among older generations.

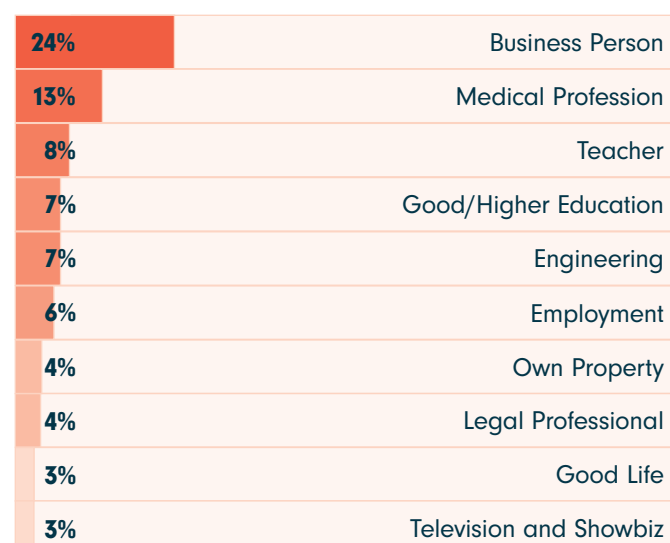
Additionally, according to a report by the Well Told Story Group, many find it hard to find role models within their communities. As a result, family members continue to influence them the most, with only 2% of young people citing elected officials and another 2% citing celebrities as role models (Well Told Story, 2017).

FIGURE 8. WHAT ARE THE CHALLENGES FACED BY YOUNG KENYANS TODAY?



British Council (2018)
Base: 4,014 respondents.

FIGURE 9. WHAT DO YOUNG KENYANS WANT TO ACHIEVE IN THE FUTURE? WHAT IS THEIR MAIN GOAL?



Well Told Story (2017)
Base: 2,923 respondents.

4.2 COMMITMENT TO SOCIAL CHANGE

Promoters of projects for social good

Like their Ghanaian and Nigerian counterparts, engaging with social causes ranks highly for young Kenyans: 29% of those surveyed identified volunteer and charity work as a personal interest. (GWI, 2017).

This interest translates into action. Data presented in the 2017 Youth Wellbeing Index from the Gallup World Poll shows that the rate of youth volunteering in Kenya is 42% (see Figure 10). This rate is 4th highest of the 29 countries indexed, with only Australia, the USA and Indonesia outperforming Kenya.

The environment is also a key concern for Kenyan youth. A survey of 622 Kenyan university students found that 27% consider global warming the most worrying global concern, while a further 15% identified environmental pollution (TIFA, 2017). Of 81 Kenyans aged 18-35 surveyed by Global Shapers, 86% said they would be willing to change their lifestyle to protect the environment (2017).

4.3. ROUTES TO YOUTH EMPOWERMENT

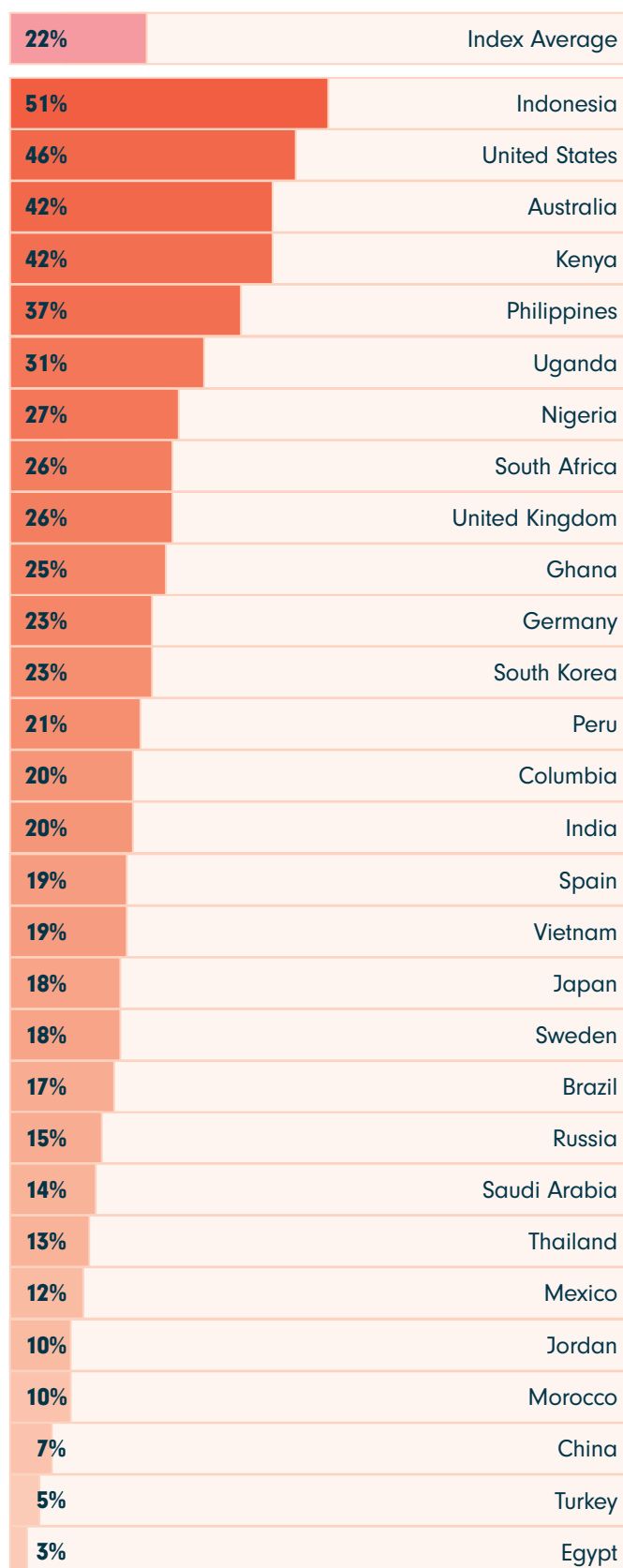
Strong appetite for education, despite system failing to address the realities of the job market

Of the households taking part in the British Council Next Generation research, 87% agreed that a good education is key to success (2018). Similarly, findings by the Well Told Story Group indicate that a college degree represents the dream for many Kenyan youth (2017). Even among those who have dropped out, the majority say they would like to return, if given the opportunity (British Council, 2018).

Entrepreneurial, business-oriented, in pursuit of opportunity

Kenyan youth show a special interest in business (38%), personal finance (28%) and the economy (26%). They are also much more interested in entrepreneurship and current affairs than most young people in other countries (GWI, 2017). According to the Well Told Story Group, income-generating activities are the primary focus for Kenyan youth, and among survey respondents, 24% want to be business people in the future; meanwhile, 27% report business as their plan B if their current plans fail (see Figure 9; Well Told Story, 2017).

FIGURE 10. RATES OF YOUTH VOLUNTEERING BY COUNTRY

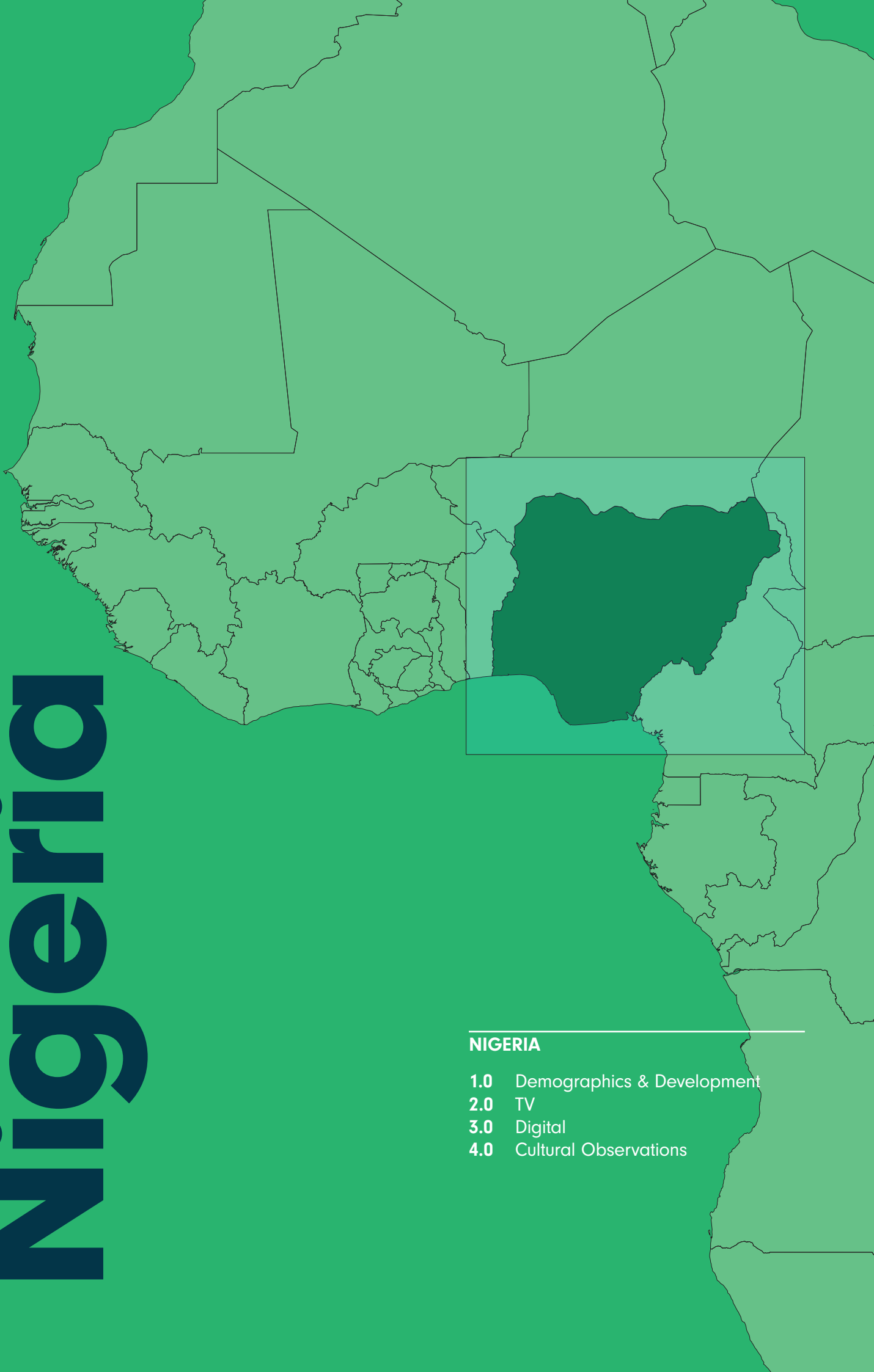


¹Base: 1.95M Respondents for Kenya. Base: 633M respondents worldwide.

²Other mobile operators include: AIRTEL, TELKOM KENYA (rebranded to Telkom following the exit of France Telecom), FINSERVE (virtual mobile network operator), SEMA MOBILE and MOBILE PAY.

YWDI (2017)

Nigeria



NIGERIA

- 1.0 Demographics & Development
- 2.0 TV
- 3.0 Digital
- 4.0 Cultural Observations

1. Demographics & Development

1.1 DEMOGRAPHICS

Nigeria is home to Africa's largest youth population

The Nigerian youth population (15–24) is the largest in Africa: 37,516,000 in total. This represents 19% of the entire Nigerian population, and 18% of the entire youth population in Sub-Saharan Africa (UN DESA, 2017).

Its youth population is growing fast

The youth population growth rate in Nigeria is 2.4% — higher than the Sub-Saharan overall rate of 2.1%. By 2030, the Nigerian youth population will have grown by 30%, totalling 53,564,000 (UN DESA, 2017).

And is increasingly urban

Nigeria's rate of urban growth is 4.2% — higher than the Sub-Saharan overall rate of 3.7%. By 2020, 52% of the total Nigerian population will live in urban areas (UN DESA, 2018).

Lagos city is Africa's most populous city, with a massive youth population

In 2015, 54% of Lagos state's population was under 25. The state's demographic structure is unique in the country (see Figures 1 and 2). Metropolitan Lagos accounts for over 85% of the state's population, taking up 37% of the total landmass. Lagos' population is growing 10 times faster than that of New York and Los Angeles, with an expected state population of 35 million in 2020.¹

1.2 DEVELOPMENT

Nigeria is outperformed on multiple education indicators

Nigeria has the lowest rates of literacy, primary and secondary gross enrolment of the four countries investigated. It also has the lowest expected and mean years of schooling (see Figure 3).

Deprivation in education a major contributor to poverty

Inequality in education in Nigeria is 43% — the highest of the four countries investigated. 51% of the Nigerian population lives in multidimensional poverty (MPI). Of the three dimensions used to measure MPI, deprivation in education contributes 30% — the most of any of the countries investigated (UNDP, 2016).



FIGURE 1. NIGERIA POPULATION PYRAMID

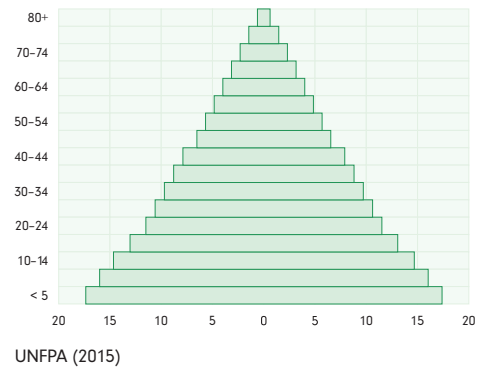


FIGURE 2. LAGOS STATE POPULATION PYRAMID

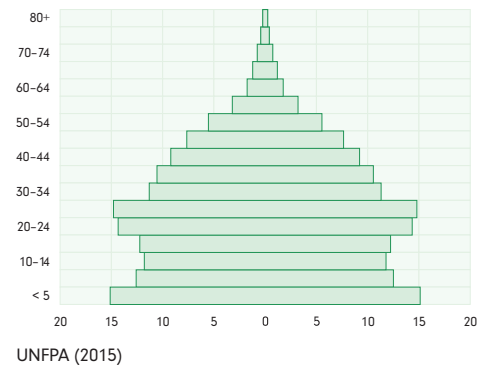


FIGURE 3. NIGERIA KEY EDUCATION INDICATORS



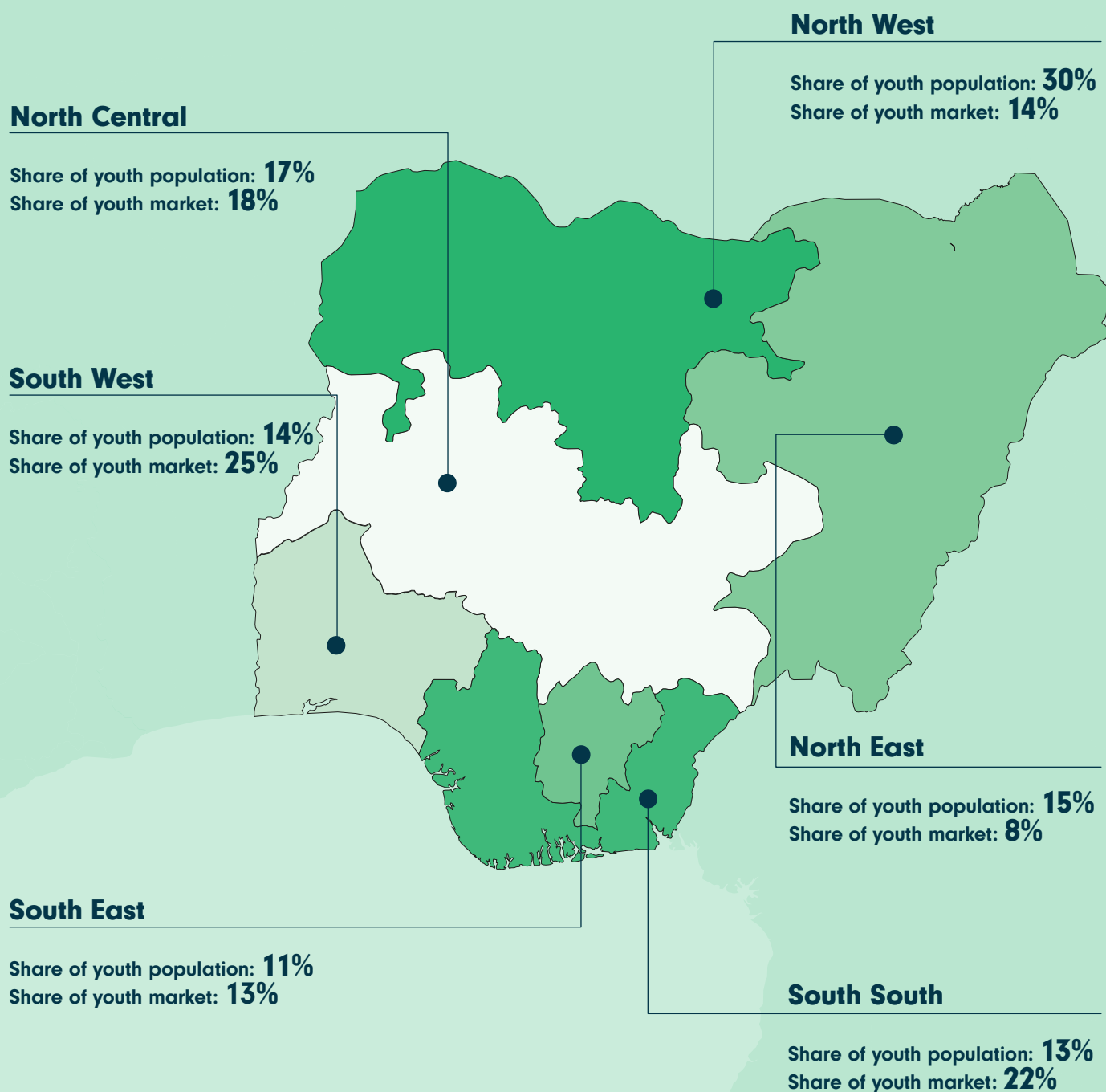
UNDP (2016); ITU (2013)

2. TV

2.1 MARKET SIZE PROJECTIONS

National Youth Population: **37,516,000***

Estimated Market Size: **13,781,080****



*UN DESA (2017)

**Based on % of young people (15–24) of both sexes who report watching TV at least once a week.
Sources: UN DESA (2017); DHS Program (2013)

2.2 SECTOR OVERVIEW

One of the most vibrant TV sectors in Africa

Nigeria's TV sector comprises a mixture of federal-, state-, and privately-owned terrestrial operators, as well as a growing number of local and foreign-based satellite operators (see Table 1). All federal and state-owned operators distribute free-to-air (FTA); privately-owned operators distribute a mix of FTA and Pay-TV.

Regional rather than national broadcasting the norm

The federal government-owned Nigerian Television Authority (NTA) is the only terrestrial operator whose services are available nation-wide. Each state has its own state-owned operator. These are increasingly owned by local politicians (BBC Media Action, 2017b).

Privately-owned operators often cover a range of states but are most heavily concentrated in Lagos. Current satellite technology means potentially national coverage for satellite channels. In reality, however, costs of satellite receivers prevent poorer communities from accessing services.

Analogue terrestrial TV remains dominant, despite Government promises for digital migration

Nigeria's digital transition is still underway, having encountered multiple delays and missed deadlines. The final completion date is currently uncertain.

Analogue terrestrial therefore remains the main means of distribution in many parts of the country – especially the less developed zones and rural areas. However, new, free-to-access broadcasting platforms such as FreeTV are being launched, bringing together existing and new channels in a digital format.

2.3 ACCESS

High access, but a significant North/South divide

According to BBC Media Action, between 92% and 94% of adults nationally have access to TV (2017b).

Watching at least once a week is much more common in urban areas. In rural areas, poor electricity supply and power outages constitute a barrier to access.

The majority (60%) of young people who watch TV once a week live in the Southern zones. While the South West makes up 25% of the total TV market, Lagos City alone contributes significantly to this share.

Only small differences in terms of both age and gender

20–24 year olds are more likely to report watching at least once a week than 15–19 year olds. However, of all the types of media available, 15–19 year olds are more likely to watch TV, since it is free for them to access at home (DHS, 2013).

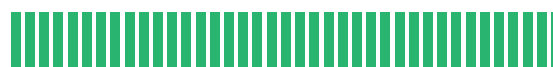
“For teenagers, most of them are still under their parents’ roof in Nigeria. So a lot of the media they have access to easily is TV, because somebody else is paying the bill.”

Media Expert: Nigeria

In rural areas, young males are more likely to watch TV than female counterparts. However, in most zones, young females report watching at least once a week – the same amount or more than males (DHS, 2013).

TABLE 1. TV OPERATORS IN NIGERIA BY OWNERSHIP

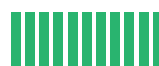
1 Federal-owned, broadcasting nationally



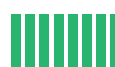
39 State-owned, broadcasting regionally



0 Private, broadcasting nationally



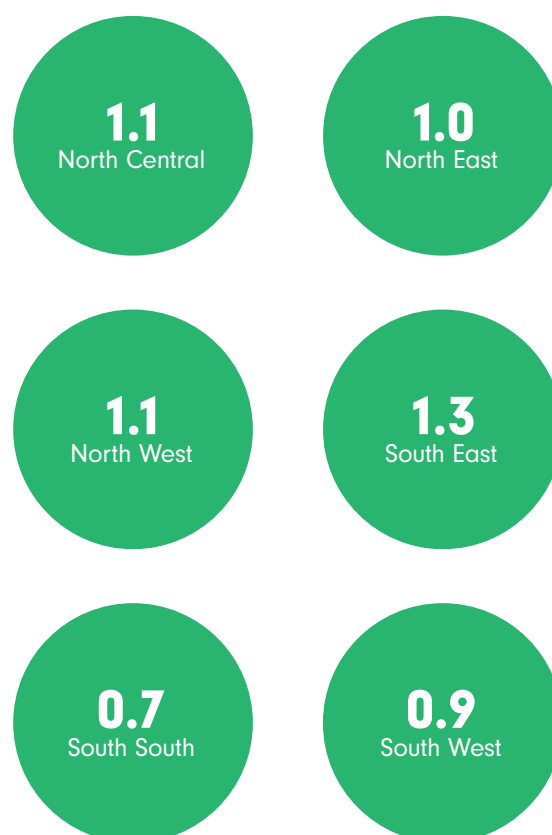
11 Private, broadcasting to 3+ states (including international satellite operators)



8 Private, broadcasting to 1 state

Adapted from Wikipedia; Digital TV Research (2017); AMDI (2005c)

FIGURE 4. GENDER PARITY OF TV MARKETS



Number of females for every one male. UN DESA (2017); DHS Program (2013).

2.4 OWNERSHIP

Highest in the Southern zones and urban areas

Ownership of TVs is much more likely in urban compared to rural households. 72% of urban households report ownership, compared to 30% of rural households (see Figure 5).

TV ownership is also more likely in Southern zones: in the South-west, 69% of households report owning a TV. In the North-east and -west, by contrast, only 25% of households report ownership.

Important for access, but out-of-home opportunities are available

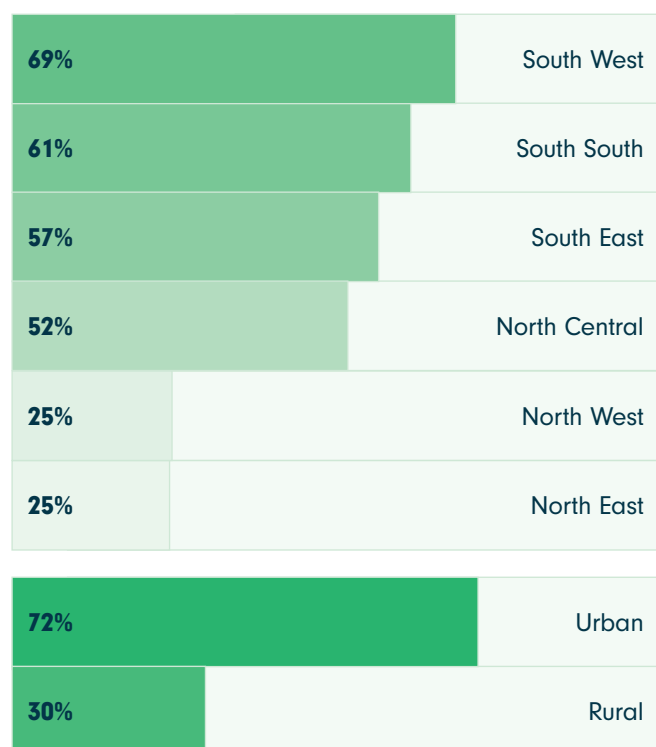
Findings from BBC Media Action show that, of 1087 15–24 year olds surveyed, 90% reported home as the place they watch TV (2016).

For older Nigerian youth there are opportunities to watch TV out of home: in public social spaces such as clubs and bars, for example. While this suggests that TV access is not entirely determined by ownership, the reach of TV out-of-home is not quantified in existing data.

Communal watching may differ by gender, due to members of the same sex congregating in the same space to watch specific programs, for example, males in bars watching sports. In addition, the role of TV may be different in these out-of-home contexts, with social interaction becoming the main purpose of watching.

“They will tune into that because that’s their crowd... so you have opportunities here in open spaces where people converge, where they converge with their friends at a time of the day.” Media Expert: Nigeria

FIGURE 5. PERCENTAGE OF NIGERIAN HOUSEHOLDS THAT REPORT OWNING A TELEVISION



DHS (2013)

2.5 PATTERNS

Daily watchers are Southern, urban, and more likely to be female

Watching TV almost every day is most common in urban areas, with the highest rates reported in the South-West and South-South (see Figure 6).

In most cases, girls are as or more likely than boys to watch almost every day.

4 till 10pm is prime time, on both weekdays and weekends

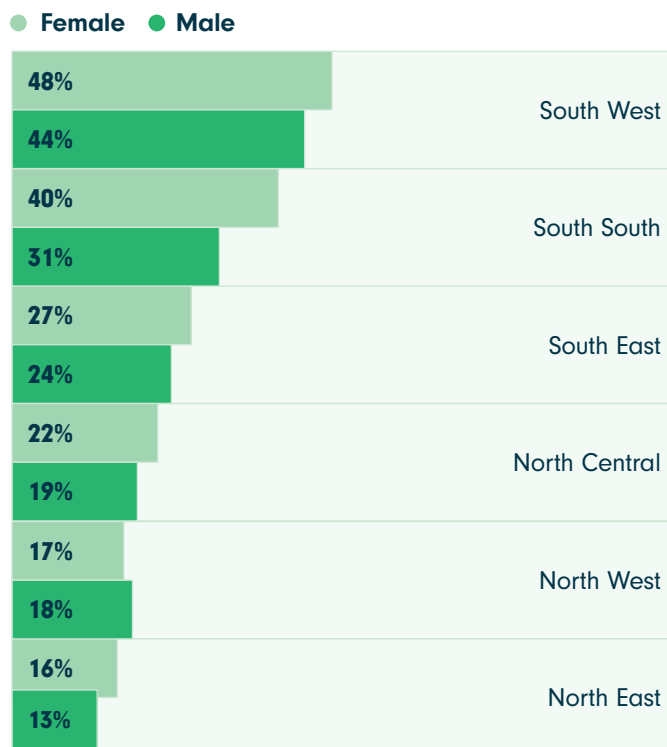
According to a survey by BBC Media Action, 15–24 year olds are most likely to watch between 4pm and 10pm (see Figure 7).

For 15–18 year olds, this is probably due to the time that they finish school. Over the weekend, there are small increases in the number of young people who report watching between 7am and 4pm, although 4pm to 10pm remains the most popular slot (see Figure 8).

School and university holidays also a key time to engage young people

Not only are young people likely to have more time to watch TV during holidays, but experts suggest that this increased time availability increases the chances that parents will invest in TV at these times. Monthly and annual spikes in viewership are impossible to confirm or quantify with existing, freely accessible data.

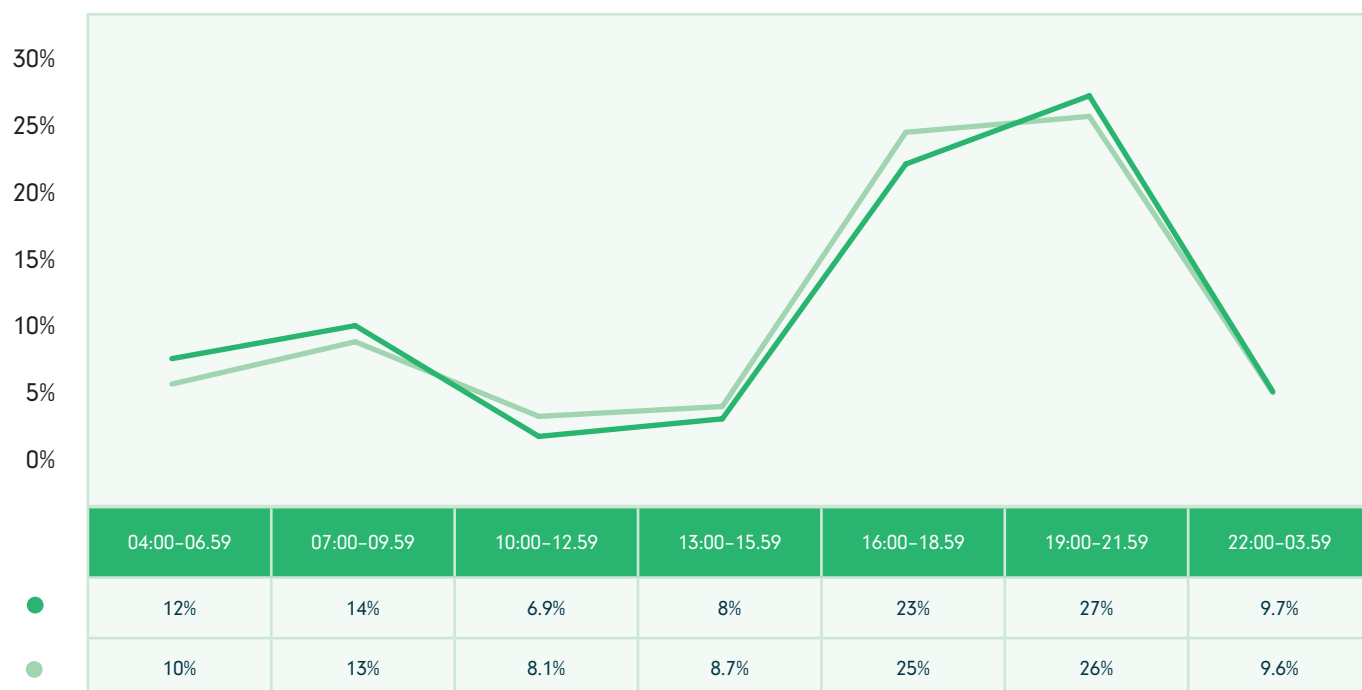
FIGURE 6. PERCENTAGE OF 15-24 YEAR OLDS WHO WATCH TV ALMOST EVERYDAY



UNICEF (2018)

FIGURE 7: MOST POPULAR WEEKDAY TELEVISION VIEWING SLOTS

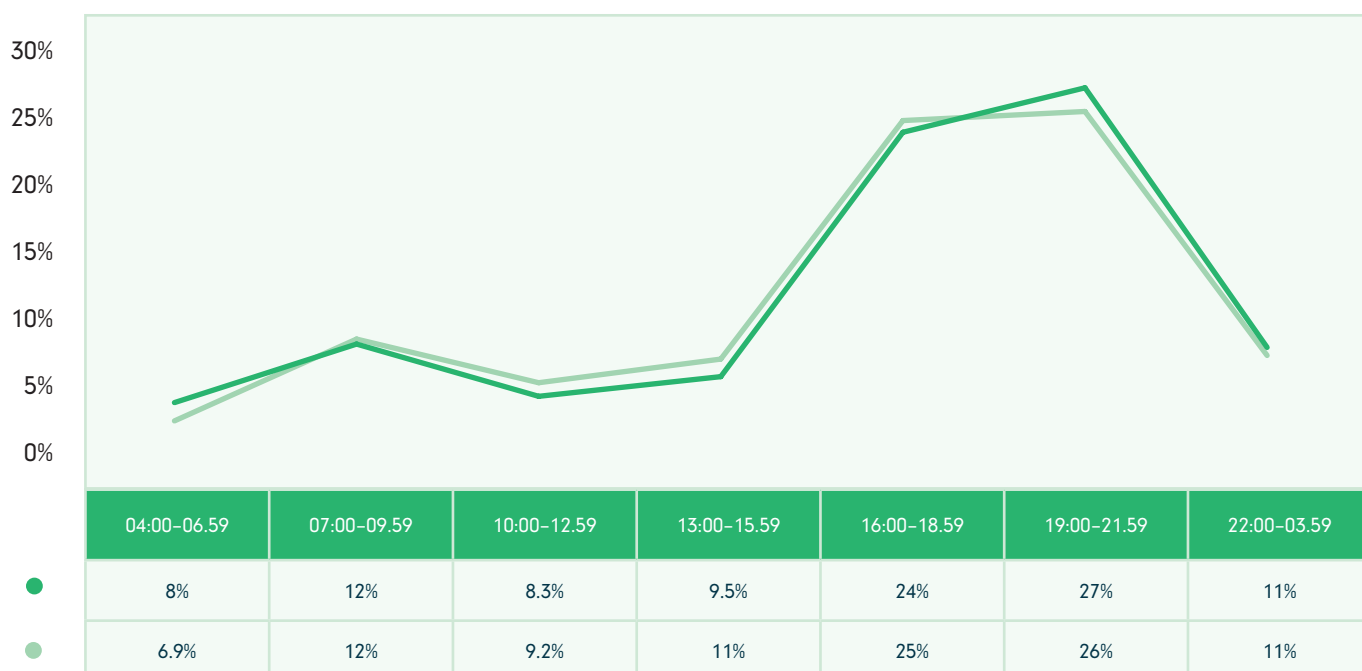
● All respondents 15+ ● Respondents 15–24



BBC Media Action (2016) Base: 3693 respondents. Percentages are of total number of responses per group. 8492 for all; 2532 for 15-24 year olds. Figures greater than 10% have been rounded to the nearest whole.

FIGURE 8: MOST POPULAR WEEKEND TELEVISION VIEWING SLOTS

● All respondents 15+ ● Respondents 15–24



BBC Media Action (2016) Base: 3693 respondents. Percentages are of total number of responses per group. 8492 for all; 2532 for 15-24 year olds. Figures greater than 10% have been rounded to the nearest whole.

2.6 PREFERENCES

Young Nigerians are avid consumers of popular culture – both local and international

Data from the GWI mobile survey found that young Nigerians aged 16–24 are more interested than the average young person in news and formats specific to popular culture, such as reality TV (31%), celebrity news and gossip (19%), dance (8%), and sport (31%) (GWI, 2017).²

They also consume popular culture across multiple media: asked to identify their personal interests, music (54%), films (47%), games (44%), books (43%), and TV (38%) were all among the top 10 responses (GWI, 2017).

Privately-owned channels are more popular among young people than state- or federally-owned channels.

When asked what channels they regularly watch, eight of the top ten channels identified by young people aged 15–24 were privately owned (see Table 2).

This is consistent with the Geopoll audience measurement findings for Nigeria from July 2017 to July 2018, which found that the privately-owned Channels TV, AIT, CNN, TVC, and WAP TV were the five most popular channels nationally (see Table 3).

However, the popularity of state - and federal-owned channels, particularly outside of Lagos, needs to be acknowledged. Based on data presented in the PAMRO Country Report, the majority of the top five channels in the majority of zones were broadcast by state or federal operators (2015).

Trend towards greater specialization of channels, in response to young people's impact on the market

The most popular channels currently provide a range of programming genres throughout the day. Newer channels, however, are increasingly specialized in terms of genres.

“Five, six, seven years ago, you had stations that did everything: they had entertainment; they had news shows. What you see now is stations that do niche entertainment... The young people are moving up, and the trend is because of age. The market is evolving and they're also evolving.”

Media Expert: Nigeria

Entertainment news the most popular genre

35% of viewers aged 15–24 prefer entertainment news that cuts across every aspect of popular culture – for example, sports, celebrity, music, and gossip (see Figure 9).

This is broadly reflected by the BBC Media Action data. The top three channels most watched by young people – Galaxy TV, TV Continental, and AIT – offer a range of both regular and entertainment news, as well as ‘real-life’ programming that cuts across different aspects of popular culture.

Music and sports the most widely appealing genres for young people

Music was the joint second most popular TV genre (along with drama) for young people in Nigeria, appealing to 22% of the audience. According to experts, channels with the most up-to-date music artists or airing live sports are the most likely to be shown in communal viewing spaces.

TABLE 2. TOP 10 CHANNELS WATCHED BY 15–24 YEAR OLDS

Rank	Channel Name	Ownership	% Respondents that watch
1	Galaxy TV	Private	7.0% (167)
2	TV Continental	Private	6.9% (165)
3	AIT Lagos	Private	6.3% (150)
4	NTA Enugu	Federal	6.0% (145)
5	Silverbird TV	Private	6.0% (145)
6	TV Gotel	Private	5.6% (135)
7	NTA Kaduna	Federal	5.2% (125)
8	AIT Kaduna	Private	4.9% (117)
9	LTV	Private	4.5% (107)
10	MITV	Private	4.1% (98)

BBC Media Action (2016). Base: 1087 respondents.

TABLE 3. NIGERIA TV AUDIENCE SHARE, Q3 2017–Q1 2018

Station	Share_Q3, 2017	Share_Q4, 2017	Share_Q1, 2018
Channels TV	10%	11%	11%
AIT	8%	8%	9%
CNN	6%	8%	9%
TVC	5%	6%	7%
WAP TV	4%	5%	7%
Other	68%	63%	58%

Geopoll (2018); see also KFC (2013)

Drama, particularly telenovelas, also popular

Appealing to 22% of the youth audience in Nigeria, drama is the most popular form of fictional content consumed.

This is supported by BBC Media Action data, which indicates that 16% of young people like drama and soap operas – the second highest behind ‘news’, although the type of news is not specified in the findings (2016).

Experts identified a lack of locally-produced, scripted content as a gap in this market, with most shows imported from overseas.

These telenovelas are imported from a wide range of countries, including the US, Korea, and Mexico. The diversity of importing countries illustrates the broad appetite for the genre itself, regardless of origin.

Comedy also increasingly popular, despite a lack of Nigerian-focused channels

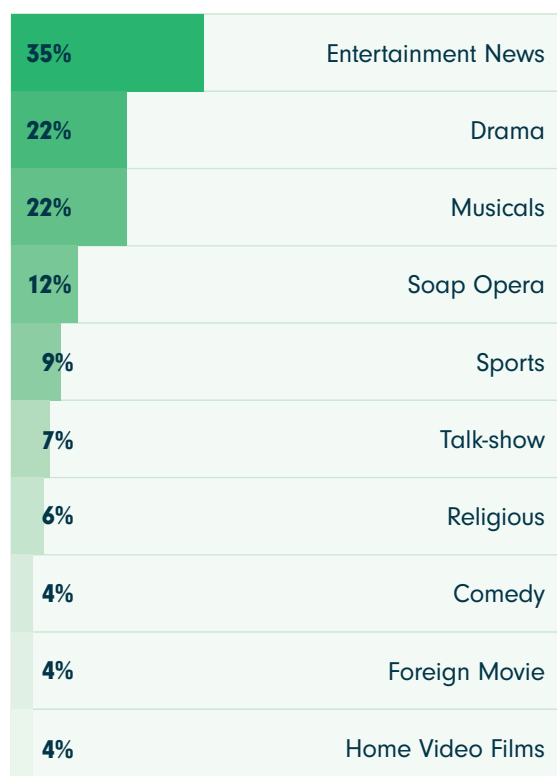
Channels imported from overseas specializing in comedy (Comedy Central, for example) are reportedly popular, according to experts.

Nigeria currently lacks a Nigeria-focused comedy channel, despite evidence of local comedy’s popularity.

“Comedy is one of the biggest growing things. When you look at the videos they show online, its usually the comedy videos that top the charts... but on TV, we don’t really have a station that is dedicated to the Nigerian, localized comedy.”

Media Expert: Nigeria

FIGURE 9. MOST POPULAR GENRES



BBC Media Action (2016). Base: 1087 respondents.

English the lingua franca on TV, especially in urban areas and Southern zones

The majority of TV channels in Nigeria are available in English. Hausa, Igbo, Yoruba, and other major languages are also present on TV, however.

Experts advise that English language programming is most suitable for reaching urban and better educated audiences, as well as those in middle to high socioeconomic groups.

However, local language adaptation important in rural and Northern zones

The popularity of locally dubbed, foreign-imported telenovelas in rural Nigerian communities indicates a preference for viewing in local languages among poorer, less cosmopolitan communities.

In the North, local languages employed in broadcasting include Hausa, Pidgin English, Kanuri, as well as other indigenous languages. In the South, Pidgin English, Igbo, Yoruba, and other indigenous languages are also used.

While local language channels like Wazobia TV are a part of the Nigerian TV sector landscape generally, they remain in the minority.

An evaluation of BBC Media Action’s work in Nigeria found that Hausa-language programs tended to have a more rural and female audience, compared to those delivered in English (2017b). Findings from both the United States Broadcasting Board of Governors (BBG; 2012) and Every1Mobile (2016) also point to the importance of local language programming, especially Hausa, in the North.

“When you go out of Lagos, you need to be a bit more sensitive to their language. When we’re going into all the rural areas, we usually would advise trying to do something indigenous for everybody...” Media Expert: Nigeria



3. Digital

3.1 SECTOR OVERVIEW, ACCESS AND DEVICE OWNERSHIP

Mobile first

3G coverage is currently at 54% of the population (ITU, 2017c). Mobile phones make up 81% of all web traffic in Nigeria (Hootsuite/WeAreSocial, 2018).

70% of 15–24 year olds own a mobile phone (AMPS, 2017).

Estimates of the proportion of smartphone ownership suggest it is over half: Afrobarometer found a proportion of 59%; Pew Research Centre, 55%. Both estimates are based on small sample sizes, however.

Internet-enabled devices include both feature and smartphones. A high influx of cheap, Chinese-manufactured feature phones mean that these devices are increasingly available even to young people with smaller incomes.

Experts suggest that feature and smartphone ownership is higher among older young people (19–24), due to the increased likelihood of disposable income (either through work or allowances) to spend on devices and data.

“From 19 to 24, some of them can now do other things to get money to buy a smartphone. They can do other jobs and find new ways to make money. They carry phones that are more expensive.” Media expert: Nigeria

MNOS driving a social media internet

There are four MNOS in Nigeria: Airtel, MTN, EMTS, and Globacom. All have launched 3G and LTE.

All four offer social data bundles, allowing consumers to pay less than the cost of regular data packages for daily, weekly, or monthly access to social media platforms.

In some cases, internet access may be to one platform only. Airtel’s cheapest social bundle, for example, is their WhatsApp Daily, which costs a quarter of the regular daily data bundle, and half of the ‘all social’ data bundle.

Southern zones best connected, with cities at the centre

72% of almost daily internet users live in cities (see Figure 10).

Nearly three quarters of almost daily internet users live in the Southern zones (see Figure 11).

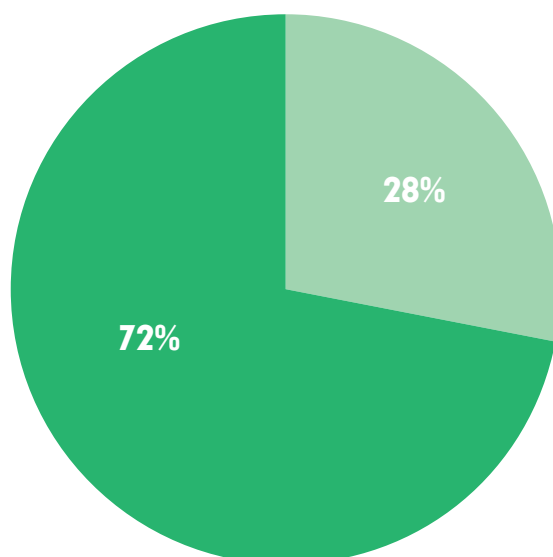
Males better connected than females

In urban areas, 30% of young men reported using the internet almost every day, compared to only 18% of young women. In rural areas, 11% of young men did so, compared to only 3% of women (Hootsuite/WeAreSocial, 2018).

Data gathered by Hootsuite indicates that the ratio of female to male Facebook users aged 18–24 in Nigeria is 5:7 (2018).

FIGURE 10. DISTRIBUTION OF DAILY INTERNET USERS AGED 15–24 — URBAN/RURAL

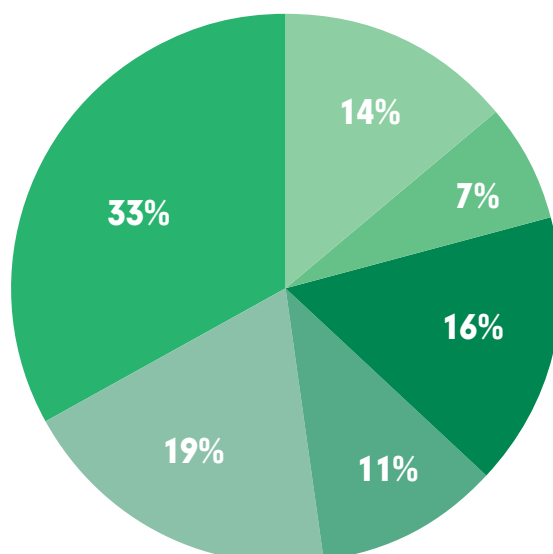
● Rural ● Urban



UN DESA (2017); UNICEF (2018)
Base: 5,329,744 (% all urban/rural daily users x urban/rural population)

FIGURE 11. DISTRIBUTION OF DAILY INTERNET USERS AGED 15–24 — BY ZONE

● North Central ● North East ● North West
● South East ● South South ● South West



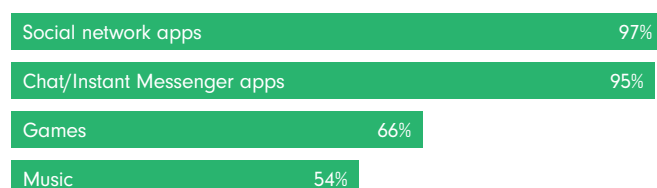
UN DESA (2017); UNICEF (2018)
Base: 4,940,633 (% zone daily users x zone population)

3.2 PREFERENCES

Social media networks by far the most prevalent, popular and engaged-with digital platforms

Among Nigerians aged 16–24 years old surveyed by GWI, 34% spend between 30 minutes to 2 hours a day on social media networks (2017).

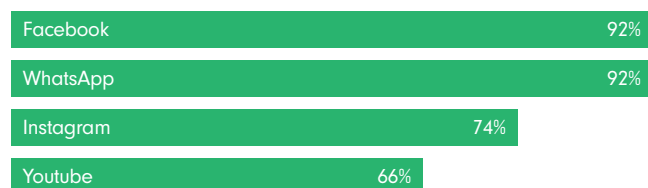
When asked as part of the GWI mobile survey what types of apps they used, young Nigerians responded:



GWI (2017)

Global social networks lead the digital market

When asked which social networks they used regularly, 16-24 year olds in Nigeria who took part in the GWI mobile survey responded:



GWI (2017)

According to GWI, young Nigerians are also much more likely to actively contribute and engage with social media platforms. 84% of young Nigerian WhatsApp users and 83% of Facebook users report actively contributing to the platform.

However, localized brands are increasingly more in tune with market preferences. Eskimi, a mobile social media platform specializing in emerging markets, also has a strong following among young people in Nigeria.

“[Eskimi] is like having a community on your phone. On this you can get everything - entertainment news, gossip, content, photo upload. You can meet people, chat, do everything. It’s a Nigerian thing. And because they allow you to use any phone, smart or feature, it [works well] and you find a lot of [young people] on the platform.” Media Expert: Nigeria

According to its website, over 9 million Nigerians are on the network, 42% of whom are between 18-24.³

Popular culture fills the online space

According to experts, entertainment and lifestyle content resonates best with young Nigerians online.

This is reflected in the content consumption preferences for the various platforms, which are strongly tied to enjoyment of different aspects of popular culture, including sports, celebrity, gossip, and TV (see Table 3).

Social networks vital tools for discovering and researching new brands

74% of 16–24 year old Nigerians surveyed for the GWI mobile survey reported using online social networks to research new brands and products – the highest response rate of any research tool.

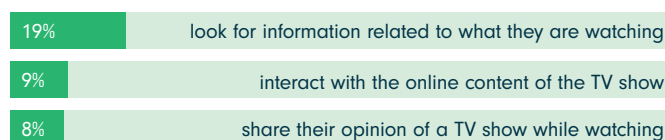
47% of young Nigerians also report online advertisements as their first place of brand discovery (GWI, 2017).

For those with access, second-screening an emerging behaviour.

Of those who report second-screening, 80% do so using their mobile phones (GWI, 2017).

50% do so to chat to friends, while 49% do so to check social media networks.

In terms of interacting with watched content:



GWI (2017)

“Particularly Nigerians and Facebook: they are second-screening commentary on live shows. It goes on all the time...when *Big Brother* or *The Voice* is on, social media goes crazy around those things.” Media expert: Nigeria

TABLE 3. TOP CONTENT/GENRE CONSUMED AMONG USERS AGED 15–24 ACROSS PLATFORM

Platform	Top Content Consumed	Comments
Facebook	Education, Business, Entertainment (TV) & Lifestyle (Music & Comedy), Celebrity, Health/Beauty, Sports, Public Figure, Alcohol, Travel & Leisure	Top content is based on liked pages
Eskimi	Sports (football) News, Gossip, Entertainment, Music, Games, Communities & Photo Uploads	Top content consumed
Twitter	Sports, Magazines, Entertainment (Music & Movies), Celebrity and Friends updates, Photos, Videos, Sports, News & Fashion	Top content is based on liked pages
Instagram	Celebrity, Comedy, Food & Entertainment pages	Top content is based on liked pages
YouTube	Comedy, Music & Movies	Top content is based on liked pages

Local M&C Saatchi partner (2018)

4. Cultural Observations

4.1 ATTITUDES TO THEIR COUNTRY

Integrating global outlook with local pride

Like the young populations of the other countries investigated, Nigerian youth, while avid consumers of international and, in particular, Western fashions, content and trends, remain proudly Nigerian. Integration of their increasingly globalized consumption preferences with signs of local culture is a hallmark of their self-expression. As one expert put it:

“Young people are at the centre; so, you have your entertainment, your fashion, the music. But then they are very Niger-centric. That’s the new thing, really. So, yes, they want to be contemporary. They want to do everything, but they want to do it in their own Nigerian way.”

Media expert: Nigeria

Optimism for the future, despite severe barriers

Nigerian youth face fierce challenges in multiple areas. The 2017 Global Youth Wellbeing Index (GYWI) ranked the country bottom overall of 29 countries, and in the bottom 5 in terms of gender equality, education, economic opportunity, safety and security, and access to information.

Despite these obstacles, however, Nigerian youth are optimistic for the future. 90% say their standards of living will be better than their parents (GYWI 2017).

Problems of governance key issue facing Nigeria

Of the 243 Nigerian respondents surveyed by Global Shapers, 77% identified government accountability and transparency as a serious issue affecting their country (GSS, 2017).

Discontent with the country’s rulers was similarly expressed by the 79% who identified corruption and lack of transparency as one of the factors contributing to inequality. Findings from the Global Millennial Viewpoints Survey also show that 78% of youth think that their government does not care about their wants and needs (GYWI, 2017).

Youth-Government tension is a salient topic in the media. In April 2018, President Muhammadu Buhari criticized Nigerian youth as “lazy and uneducated”. Youth solidarity in response to such criticisms was evident in the ensuing social media revolt under the hashtag #LazyNigerianYouth, as well as the traction gained by youth-focused political empowerment campaigns such as “Not Too Young to Run”.

Let down by current educational provisions and opportunity

Lack of opportunity and employment was identified as a serious issue facing Nigeria by 37% of 18–35 year olds, indicating that young people feel they are not currently being given a chance to fulfil their potential (GSS, 2017).

This feeling may also be related to their perception of the lack of good quality education, which 41% identified as a contributing factor to inequality (GSS, 2017).

Excluded by older generations

According to findings from Voices4Change, a UK Aid-funded gender equality program in Nigeria, young people feel that adults don’t value their input, and also feel excluded from spaces occupied by adults.

Young Nigerians reportedly complained of adults dominating spaces that should be youth led, such as national student bodies or student unions at university (V4C, 2017).

4.2 COMMITMENT TO SOCIAL CHANGE

Young Nigerians want to see positive change in their country

According to a study by Voices4Change, 82% of young males and 79% of young females across six states (Kaduna, Bauchi, Lagos, Rivers, Enugu, Benue) describe themselves as change agents (2017). Areas that they are keen to change include: infrastructure (41%), the economic situation (24%), attitudes and practices of adults and youth (18%), government policies and laws (16%); and youth vices such as drug use and gambling (12%).

FIGURE 12. TOP 5 PERCENTAGES OF YOUNG PEOPLE (16-24), BOTH SEXES, WHO REPORT A PERSONAL INTEREST IN VOLUNTEERING AND CHARITY WORK

Kenya	29%
Ghana/South Africa/UAE	27%
Nigeria/Egypt/Malaysia	26%
Portugal	25%
Brazil	23%

GYWI (2017)

Young Nigerians are aware of development priorities and consider themselves active in achieving positive outcomes. 84% of Nigerians aged 18–35 surveyed for the Global Shapers Survey were aware of the Sustainable Development Goals (SDGs). 70% considered themselves in some way active in helping achieve them. (GSS, 2017)

Young Nigerians are socially conscious in their interests and behaviours

26% of Nigerians aged 16–24 surveyed by GWI identified volunteer and charity work as a personal interest. Young Nigerians are more likely than their international counterparts to show interest in volunteer and charity work (see Figure 12).

This figure is supported by data presented in the 2017 Youth Wellbeing Index from the Gallup World Poll, showing that the rate of youth volunteering in Nigeria is 27%. This rate is 5% higher than the index average of 22% (2017).

81% of 18–35 year olds surveyed by Global Shapers said they would change their lifestyle to protect nature and the environment.

4.3 ROUTES TO YOUTH EMPOWERMENT

Young Nigerians believe they have a responsibility to improve their lives

Findings from the Voices4Change program show that 70% of young people identified themselves as responsible for change, compared to only 40% who identified traditional rulers (2017).

Religion is a key factor in providing access to youth community

Voices4Change found that religious groups are the most popular spaces for young people to engage with one another. 38% of young men and 48% of young women across the six states reported belonging to a religious group. (V4C, 2017)

Common expressions of Nigerian youth identity increasingly salient

Along with the hashtag #LazyNigerianYouth, coinages such as 9JA — also: ‘Naija’ — indicate a common sense of identity among youth and are frequently appropriated by brands and organizations to try and engage youth.

Access to information key to young Nigerian’s sense of empowerment

According to data from the Global Shapers Survey, 54% of 18–35 year olds identified access to the internet as an important factor contributing to youth empowerment. 52% similarly identified free media and social media as a factor (2017).

Entrepreneurship perceived as vital to empowerment, and a common interest of the young

According to data from the Global Shapers Survey, 53% of 18–35 year olds identified start-up ecosystems and entrepreneurship as factors contributing to their feeling of empowerment (2017).

This is reflected in Nigerians’ entrepreneurial spirit. Young Nigerians aged 16–24 showed high interest in business (37%), personal finance (30%), and the economy (28%), compared to other countries surveyed (GWI, 2017).

Business and entrepreneurship recognized as key areas for youth to realize their potential

Findings from Voices4Change indicate 9/10 adults and young people agreed that young people in Nigeria are creative, hardworking, energetic, innovative, industrious, enterprising, dynamic, visionary, and resourceful; only 1/3 agreed that they could be described as lazy (2017).

Nigerian youth recognize their potential most keenly in relation to business and entrepreneurship. Across the six states studied by Voices4Change, 62% believed that young people can influence business and entrepreneurship in Nigeria. However, only 29% believe that they currently are doing so.

40% believe that with greater support, young people could fulfil their potential in business and entrepreneurship (V4C, 2017).

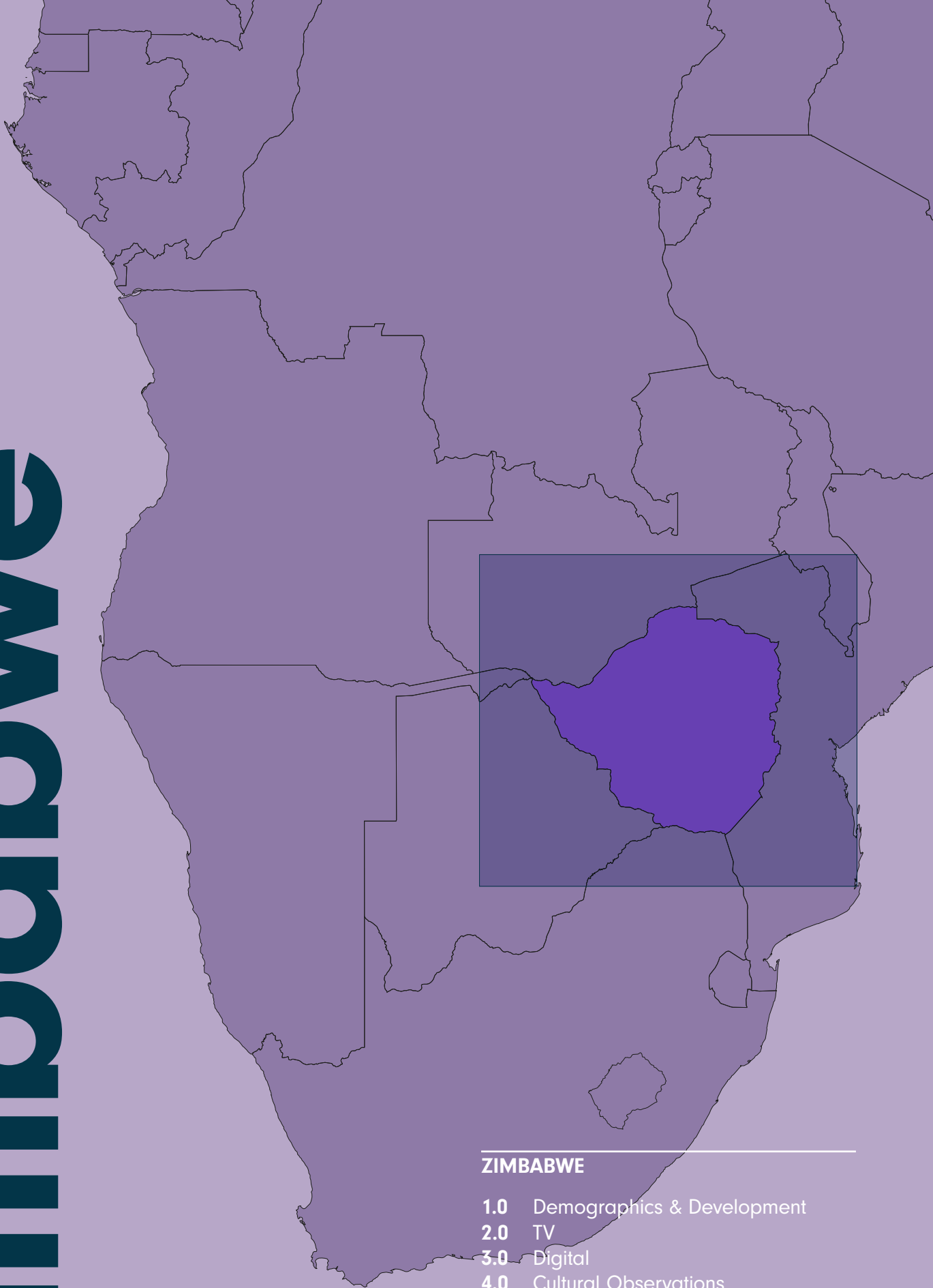


¹<https://lagosstate.gov.ng>

²Base: 20.3M respondents for Nigeria; Base: 633M respondents worldwide

³<http://business.eskimi.com/social/>

ZimboqbiZ



ZIMBABWE

- 1.0 Demographics & Development
- 2.0 TV
- 3.0 Digital
- 4.0 Cultural Observations

1. Demographics & Development

1.1 DEMOGRAPHICS

By 2030, Zimbabwe's youth population will have increased by 25%

Zimbabwean youth make up 20% of the total country population: (3,380,000 persons). The youth population is growing at a rate of 1.3%, as compared to Sub-Saharan Africa's overall rate of 2.1% (UN DESA, 2017).

By 2030, the youth population is projected to reach 4,540,000. This represents the second largest percentage increase (25%) of the four countries investigated, behind Nigeria only (UN DESA, 2017).

Significant youth migration to urban hubs, particularly Harare

The majority of Zimbabwean youth live in rural areas and the country's rate of change for its urban population is 2.2%, which is lower than the Sub-Saharan overall rate of 3.7%. By 2020, 32% of Zimbabweans will live in urban areas (UN DESA, 2018).

Despite the low overall urban rate of change, there is marked migration by young people in Zimbabwe to urban areas, especially the capital and Zimbabwe's largest city, Harare (see Figure 1).

Only 11% of females and 10% of males aged 10–14 live in Harare; however, by their twenties, this figure is 20% for females and 17% for males. As in Kenya, migration into urban areas is undertaken by females at an earlier age than males.

1.2 DEVELOPMENT

Sharp drop-off in secondary school enrolment

Despite high rates of primary enrolment, Zimbabwe exhibits the greatest drop-off in transition to secondary school among the four countries investigated (see Figure 2).

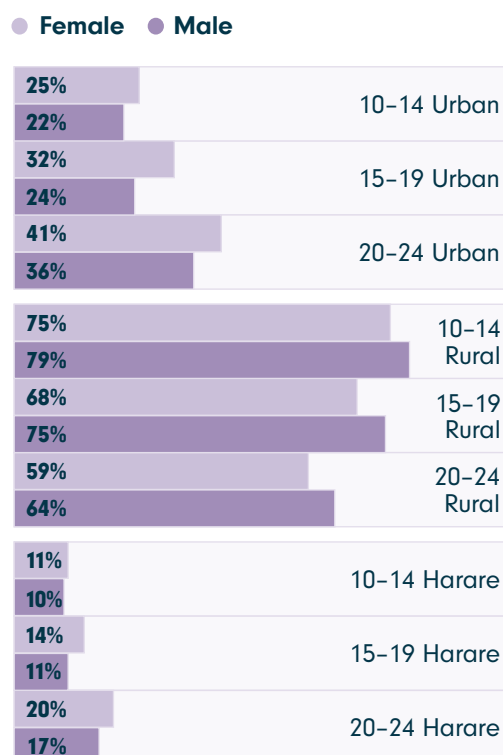
Early exposure to the internet

Of the four countries investigated, Zimbabwe has the highest percentage of digital natives: 25% of young people aged 15–24 have been using the internet for at least five years, according to 2013 statistics (ITU, 2013).

Relatively equal access to education for girls and boys

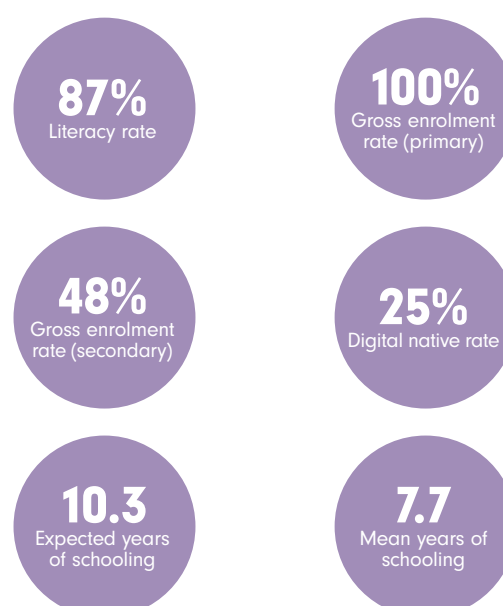
The UNDP classifies Zimbabwe as a country with medium levels of gender equality — the highest rank of the four countries investigated (2016). In terms of education, girls are expected to spend marginally less time in education (10.2 years vs. 10.5 years), although on average have almost a year less of schooling (7.3 years vs. 8.2 years).

FIGURE 1. PERCENTAGE OF YOUTH LIVING IN URBAN HUBS



UN DESA (2018); UNFPA (2018d)

FIGURE 2. ZIMBABWE KEY EDUCATION INDICATORS



UNDP (2016); ITU (2013)

2. TV

2.1 MARKET SIZE PROJECTIONS

National Youth Population: 3,380,000*

Estimated Market Size: 1,113,759**

Midlands

Share of youth population: **13%**
Share of youth market: **13%**

Matabeleland North

Share of youth population: **5%**
Share of youth market: **3%**

Bulawayo

Share of youth population: **6%**
Share of youth market: **12%**

Matabeleland South

Share of youth population: **5%**
Share of youth market: **4%**

Mashonaland West

Share of youth population: **12%**
Share of youth market: **13%**

Mashonaland Central

Share of youth population: **9%**
Share of youth market: **6%**

Mashonaland East

Share of youth population: **10%**
Share of youth market: **7%**

Manicaland

Share of youth population: **14%**
Share of youth market: **11%**

Harare

Share of youth population: **15%**
Share of youth market: **24%**

Masvingo

Share of youth population: **11%**
Share of youth market: **8%**

*UN DESA (2017)

**Based on % of young people (15–24) of both sexes who report watching TV at least once a week.

Sources: UN DESA (2017); DHS Program (2015)

2.2 SECTOR OVERVIEW

New entrants disrupting historically uncompetitive sector

Zimbabwe's television sector currently comprises one state-owned terrestrial operator (the Zimbabwe Broadcasting Corporation, ZBC) and several, foreign-based satellite operators. ZBC currently manages the sole television station, the 24-hour ZTV. However, a second television station, Zimbabwe Television Network, was announced earlier this year (BBC Media Monitoring, 2018).

“The major change is the fact that there’s a new operator. Before it was literally just DStv and the national broadcaster (ZBC). Now people have options.” Media Expert: Zimbabwe

DStv has historically held a monopoly on the Pay-TV market in Zimbabwe. However, Kwešé TV has disrupted the Pay-TV market by introducing a pay-as-you-go bouquet model that offers all the channels but allows audiences to choose the number of days they have access. Kwešé TV is also reportedly seeking to disrupt ZBC's control of FTA, by offering five free channels even to non-subscribers.¹

Digital migration incomplete, yet promises to diversify the market

Zimbabwe's digital transition is still underway, with delays caused by poor planning and lack of funding. However, in April 2018 Presidential spokesperson George Charamba confirmed that the government will soon invite applications to bid for 12 new television licenses, indicating a future diversification of the television market.²

2.3 ACCESS

Television viewing overwhelmingly urban, with little presence in rural areas

Watching television is an overwhelmingly urban activity, with 63% of urban males and 65% of urban females report watching television at least once a week, compared to 13% across both genders for both their rural counterparts (DHS, 2015).

“For the young people in urban areas, most of them have got access...but in the rural areas, there’s none. And that’s motivated by cost, by poor electricity and power outages in the rural areas...and by connectivity. So for them, it makes sense to use radio.” Development Expert: Zimbabwe

Zimbabwe's weekly watching audience is concentrated in the capital city of Harare, which holds 24% of the potential youth market. The other urban hub, Bulawayo, is home to a further 12% of the estimated youth market, despite containing only 6% of the overall population. The distribution of the youth market can be seen in Section 2.1.

Substantial opportunity to reach young women

Zimbabwe exhibits higher levels of gender equality in terms of regular access to television than the other countries investigated.

In all regions other than Harare, a higher percentage of females report watching television at least once a week, compared to males. Even in Harare, the early migration and high population of females in the capital means that the ratio of male to female weekly watchers favors females (1.1 females watching for every 1 male – see Figure 3).

FIGURE 3. GENDER PARITY OF TV MARKETS ***



***Number of females for every one male. UN DESA (2017); DHS Program (2015).

2.4 OWNERSHIP

Highest in Bulawayo, but below 40% in the majority of regions

In Bulawayo household television ownership is at 83%, while in Harare it is 62%. As the country's financial center, the increased wealth of Bulawayo's residents may explain its high rate of ownership.

Outside of these urban centers, however, the highest ownership rate is 46% (Mashonaland West) and falls as low as 29% (Mashonaland Central).

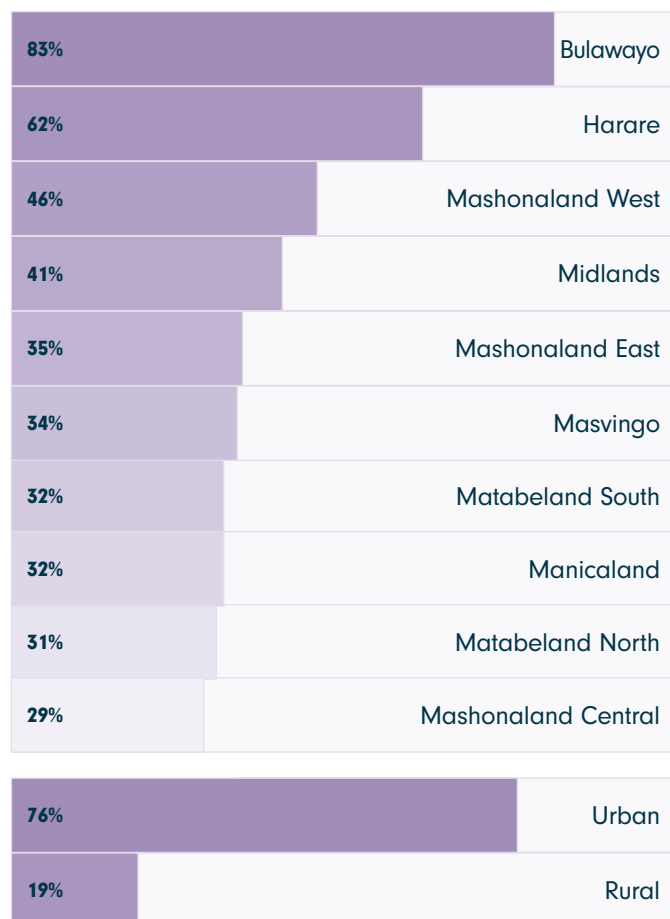
In rural areas, ownership is 19%, compared to 76% in urban locations (see Figure 4).

Out-of-home opportunities available in a range of contexts

High youth unemployment means that young people are increasingly likely to congregate in public places – especially leisure venues or places offering opportunity for work. These locations often provide opportunities for group television viewing.

“Some schools may have TV actually. For those who are more adventurous, there's beer holes... where they have TV and live music. Also generally schools, town halls, community centers: these are the areas where you may be able to watch TV if you don't have one at home.” Media Expert: Zimbabwe

FIGURE 4. PERCENTAGE OF ZIMBABWEAN HOUSEHOLDS THAT REPORT OWNING A TELEVISION



DHS (2015)

2.5 PATTERNS

Daily viewing confined to urban hubs

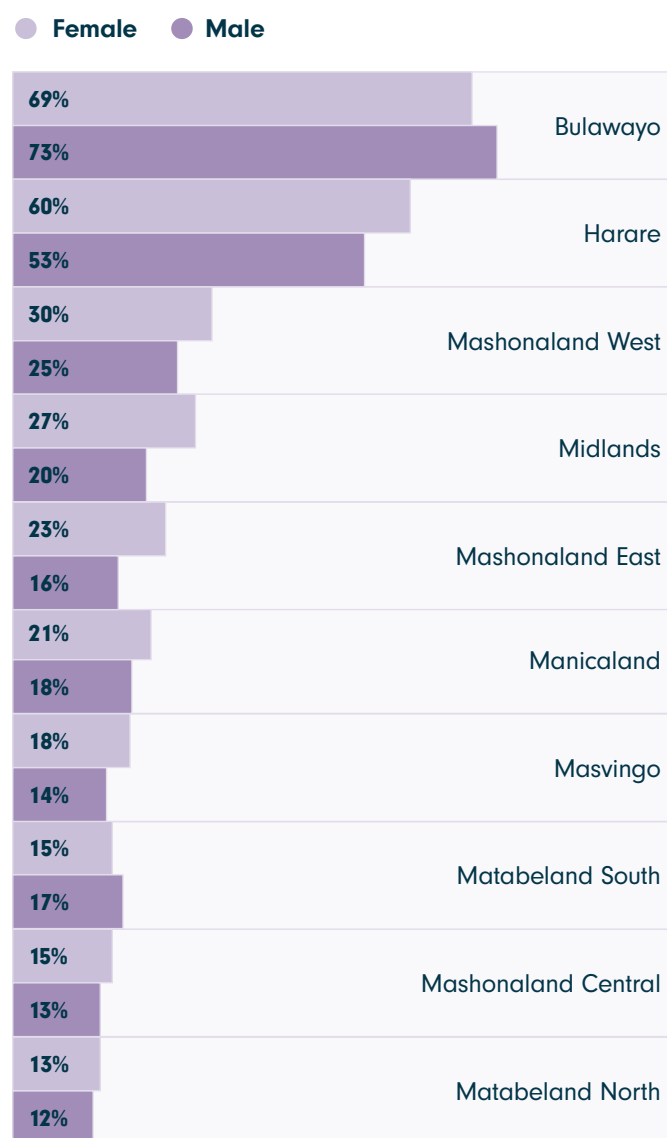
Watching television daily is most common in Bulawayo and is reported by 60% and 53% of females and males in Harare respectively. However, in all other regions it is far less common, consistent with the poor levels of television access outside the major cities (see Figures 5).

Household social structures dictate young people's viewing patterns

According to experts, time periods in which the local news or sports airs represent no-go times for viewing channels aimed at young people.

“In Zulu households, the culture is that the father generally isn't really interested in TV except when there is sport and the news. The local news is a no-go area... So if you're trying to reach young people, your best bet would be between 5:00 to 7:00 in the evening...And then from 9:00 onwards, because the news comes in at 8:00.” Media Expert: Zimbabwe

FIGURE 5. PERCENTAGE OF 15-24 YEAR OLDS WHO WATCH TELEVISION ALMOST EVERYDAY



UNICEF (2014)

2.6 PREFERENCES

Pronounced divide between urban and rural audiences' channel preferences

While unpopular in the urban centers of Harare and Bulawayo, local media experts indicate that state television station ZTV is by far the most popular in rural areas.

Poor regulation of terrestrial broadcasts and prohibitive costs of satellite pay-TV means that ZTV is the station that rural areas most have access to, hence its apparent popularity.

"In the rural areas it will be state television, because it's cheaper. Families can watch it without even paying the basic fee [because] there's no checking system to say if you haven't paid... And if you can look at the subscription fee for the satellite TV, this pushes up costs for those who are in the rural areas. They can't have access to that."

Development Expert: Zimbabwe

There is presently a lack of good quality, fictional entertainment content in Zimbabwe

Among young people, music channels remain the most popular, and constitute the main competition for any entertainment offering. The cut-through of specialized young people's channels, however, illustrates an appetite for more targeted content, regardless of origin.

"Zambezi Magic, what they've done and they've done really well is it's literally a melting pot of production houses from all over Southern Africa producing content that speaks to their kids in essence. All the TV shows that are on there are specifically geared for a younger audience."

Media Expert: Zimbabwe

Traditional adult themes no longer resonate with younger audiences

Similarly, experts report that channels carrying overseas soap operas from India and Latin countries are extremely popular. Telemundo, a Spanish-language channel, and ZEE, which carries Indian Bollywood content, were two that were mentioned, in particular.

Their growing popularity in Zimbabwe was ascribed to a break from the preferences of older generations, as stories rehashing themes that were once in vogue appear tired in contrast to more adolescent themes such as teenage romance and family drama.

"For some strange reason, the East African and West African content is not as popular as it used to be. It's more popular with an older crowd. Maybe it's because of the type of content which has to do with witchcraft and all of these things, so it doesn't necessarily resonate with a younger audience...Whereas the Bollywood stuff is really just bubble-gum stuff, boy meets girl, that kind of stuff."

Media Expert: Zimbabwe



3. Digital

3.1 SECTOR OVERVIEW, ACCESS AND DEVICE OWNERSHIP

Access is poor and confined to urban areas

3G coverage of the population in Zimbabwe is 55%, which is lower than the continent average of 59% (ITU, 2017c). In addition, regular access to the internet is heavily concentrated in urban areas, with 91% of almost daily internet users living in cities (see Figure 6).

Of the urban centers, Harare has the greatest concentration of regular young internet users: 45% of the total daily market live in the capital, while only 19% live in Bulawayo (UN DESA, 2017; DHS Program, 2015).

Mobile broadband dominant, although costs remain prohibitive for many young people

Mobile broadband is the prevalent mode of internet access in the country. Mobile phones make up 67% of all web traffic in Zimbabwe (Hootsuite/WeAreSocial, 2018).

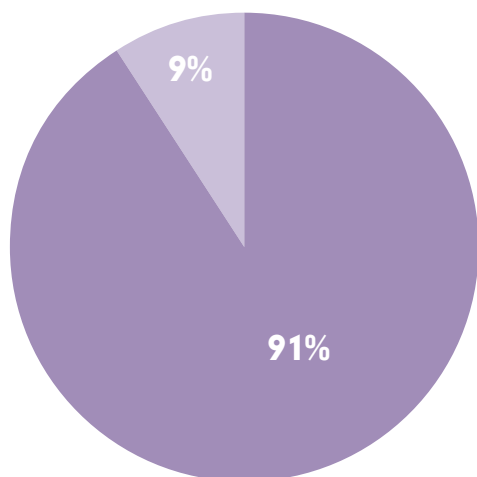
As in the other markets, social data bundles sold by MNOs constitute a key route by which they are trying to target younger markets.

"[In terms of access to the internet], it's strictly the bundling. Kids are learning to manage whatever pocket money they get access to and buying bundles. That also determines the usage culture. Facebook is great in terms of seeing what else everybody is doing, and this is what the kids are using, Facebook and Instagram. In terms of communication and staying connected to your friends, it's the bundles."

Development Expert: Zimbabwe

FIGURE 6. URBAN/RURAL DISTRIBUTION OF DAILY INTERNET USERS

● Urban ● Rural



Base: 305, 903
UN DESA (2017); DHS Program (2015)

Foreign imports increasing device ownership, but smartphones remain the privilege of the wealthy

In urban areas, 77% of males and 65% of females aged 15-24 own a mobile phone. In rural areas, ownership stands at 49% and 45% respectively (DHS, 2015).

Age has a significant impact on the likelihood of a young person owning a mobile phone, with 20-24 year olds much more likely to own a device. In urban areas, for example, 65% of 15-19 year olds own a mobile, compared to 88% of youth aged 20-24. Similarly, while only 37% of rural males aged 15-19 own a phone, 70% of 20-24 year olds do so (DHS, 2015).

According to data from Afrobarometer, of the 84% of 18-25 year old Zimbabweans who reported owning a mobile phone, 36% also said their device could access the internet (2018). According to experts, however, internet-enabled phones are concentrated in cities.

"It comes back again to the issue of affordability. In urban areas, most young people, they have got access to phones that go onto the internet.... But in urban areas they are able to earn money to pay for the connectivity. It's a different situation in rural areas. Most of them, they have got the phone, but for those in the rural areas, those phones, they don't access the internet." Development Expert: Zimbabwe

Gender parity does not hold online

Despite superior gender equality in a number of areas, there is significant gender disparity in regular internet usage in Zimbabwe.

In urban areas, 38% of young males reported using the internet almost every day, compared to only 14% of young females. In rural areas, 1.6% of young males do so, compared to only 0.7% of females (DHS, 2015).

3.2 PREFERENCES

Digital platforms primarily a source of entertainment, rather than education

While data on the internet preferences of young Zimbabweans is extremely limited, experts report that – as elsewhere – social media networks and instant messenger applications dominate.

"Most young people don't usually use the internet to do research and to explore new avenues of knowledge... it's more about entertainment, about social." Development Expert: Zimbabwe

4. Cultural Observations

Proudly African, yet avid consumers of global fashions and trends

In the words of one expert,

“Young people out here are definitely no different to the entrepreneurs out there. They’re really clued up in terms of what’s hot...In my experience, in the three markets that I navigate on a monthly basis, it’s the same. It’s a consumption of media and what’s really cool and it’s all predominantly media that comes in from either the US or from Europe.”

Media Expert: Zimbabwe

Alongside these international consumption preferences, 96% of 15–19 year olds and 95% of 20–24 year olds identified themselves as proud to be African, when polled on the UNICEF U-Report platform (2016).

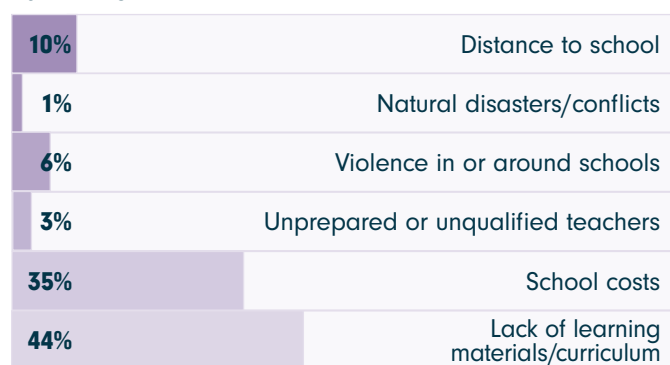
Increasingly vulnerable to abuse and manipulation

Zimbabwean youth face many of the challenges shared by young people across Sub-Saharan Africa, including high unemployment rates, poor education, limited opportunities, poor access to civic engagement, high HIV prevalence, drug abuse, teenage pregnancy and early marriage (ZHRC, 2017).

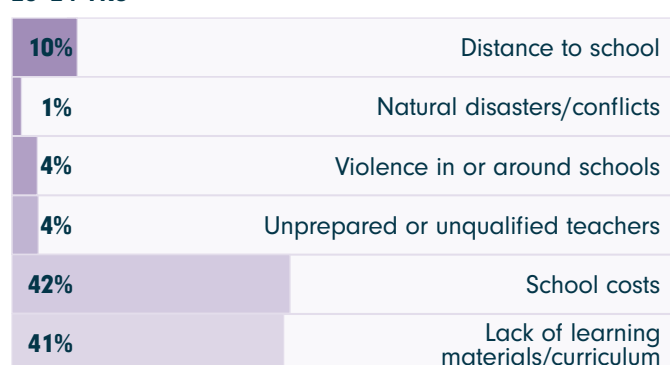
The Commonwealth Global Youth Development Index ranked Zimbabwe 174 out of 180 countries in terms of the Health and Wellbeing of youth aged 15–29 (2016).

FIGURE 7. SURVEY OF ZIMBABWEAN YOUTH AGED 15–24 REGARDING BARRIERS TO EDUCATION

15–19 YRS



20–24 YRS



UNICEF U-Report (2018a)

This composite statistic includes measures of youth mortality; rates of drug and alcohol abuse, HIV and mental disorders for 15–29 year olds; and the country’s score on the Gallup Global Wellbeing Index.

The confluence of multiple risks to their safety and wellbeing means that Zimbabwean youth are extremely vulnerable. This vulnerability is manifest in young Zimbabweans’ susceptibility to manipulation by politicians, with reports indicating that political parties have proven successful in inciting youth to violence around election times (ZHRC, 2017).

Prohibitive costs, poor resources and government corruption denying young people access to quality education

Despite a constitution that provides that every child has a right to education up to a tertiary level, high costs of education in Zimbabwe mean that youths are often denied sufficient access to quality education.

A poll conducted by UNICEF on the Zimbabwe U-Report platform indicated that the majority of 15–24 year olds identified school costs and lack of learning materials as the biggest barriers to quality education in their community (see Figure 7).

In a separate poll, meanwhile, 33% of 15–19 year olds and 28% of 20–24 year olds thought corruption in Zimbabwe was reducing the quality of education - the second most popular response behind stopping people from accessing justice (2018b).

Lack of education also the major challenge facing women and girls, according to youth

Of the 15–19 year olds and 20–24 year olds surveyed using a third U-Report poll, 37% identified quality education as the biggest challenge facing Zimbabwean girls and women. Female respondents, in particular, felt this way: 35% identified education as the major issue, compared to 27% of males. For both age brackets, quality education was seen as a bigger challenge than the lack of safe spaces and threat of violence (2018c).

Zimbabwean youth turning to solidarity and protest

As in the other countries investigated, Zimbabwean youth are increasingly protesting against the injustices they face. According to the ZHRC, 2016 and 2017 witnessed an upsurge in citizen demonstrations, many of them by youth (2017).

Social media has played an important role in enabling protest, with campaigns like #ThisFlag³ and #ThisGown⁴ gaining significant traction among Zimbabweans. The latter was started by graduate Samuel Meso, who wore his graduation gown to anti-Government protests in 2016 in reaction to his and other young people’s inability to find employment.

¹<http://www.creativeloop.co.zw/2017/10/kwese-tv-offer-5-free-channels-even-dont-subscribe/>

²<http://www.chronicle.co.zw/zim-to-have-24-tv-channels/>

³<https://qz.com/africa/768868/social-media-is-emboldening-young-zimbabweans-to-finally-stand-up-to-mugabe/>

⁴<http://nehandaradio.com/2016/08/05/mugabe-faces-rising-tide-protest-zimbabwe/>

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