

KENYA



Gen Z Growth Playbook

Unlocking the Power of Z to drive sustainable growth

AUDIENCE INTELLIGENCE

September 2024



Agenda

1 Introducing the Gen Z playbook

2 Methodology

3 Unpacking the power of Z

4 Industry-specific playbooks

5 What's next?

Introducing The Gen Z Growth Playbook

Gen Z Growth Playbook is based on the belief that to truly capitalize on the potential of Gen Z, global brands need to deepen their understanding of this diverse, digitally savvy, and value & purpose driven generation. By aligning with their cultural nuances, media preferences, values, and economic realities, brands can create more effective and relevant marketing strategies that drive growth and loyalty among Gen Z consumers.

We are proposing a new and innovative approach to shape this understanding of Gen Z by leveraging real time data and trends in a way that has not been done in Africa. By partnering with Kasi Insight for this report, we have the unique opportunity to re-examine consumer centricity to unlock new tensions and opportunities within this segment. Using this approach, we uncover a unique duality of this growing segment in Kenya and build on it to generate the Playbook.

Gen Z are shaped by a world that is global and connected which informs their views of themselves, their peers and leaders. Global brands that better understand and cater to the unique preferences and needs of this dynamic group will be well positioned to achieve sustained growth and success in the Kenyan market.

While this Playbook offers a guide for businesses in Kenya, unpacking the transformative role of Gen Z, offering lessons to guide strategies and marketing efforts across various sectors, the insights are enriched and augmented by data on consumer attitudes, media habits, and sustainability practices from 20 other key African markets.



Our goal is to empower African businesses with game changing insights that support business growth strategies, global segmentation and local go-to-market plans are rooted in data that drives culturally nuanced creative and media strategies.

UWG Africa has partnered with Kasi Insight to merge their Decision Intelligence Platform, which helps decision-makers unlock trends and insights at scale, with our Uniculture Intelligence Network process. This process leverages deep and culturally relevant insights and data to build growth audience profiles, develop innovative design strategies, and implement comprehensive connection strategies that optimize reach, engagement, conversion, and brand love.



Gil Kemami
CEO, Twotone Pan-Africa
& UWG Africa

Kasi Insight empowers decision makers with context, insights and foresight needed to win in Africa. We provide real-time, aggregated and trended primary data on and across Africa at a speed and ease not matched by traditional market research. We fuse exclusive real-time data with applied AI to decode African opinions, actions, and the future.

With our cutting-edge platform, we tap into 609 million African voices, conducting 12,000+ monthly interviews across 20+ major economies, crafting tailored projects spanning every corner of the continent. We are an authentic African success story born, funded, led and supported by Africans.

This report explores how Gen Z is leading a transformative shift in Kenya's market and what brands can win the fastest-growing consumer segment in Africa.

YANNICK LEFANG
Founder & CEO
Kasi Insight Inc.



THE METHODOLOGY

The *Kasi Insight Decision Intelligence platform* is a robust framework developed by Kasi Insight to help decision makers unlock trends and insights at scale. We fuse exclusive real-time data with applied AI to decode African opinions, actions, and the future.



Datasets

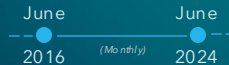


Timeframe



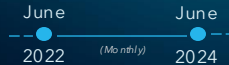
Description

Index of Consumer Sentiment
(n=483,793)



Kasi ICS is a measure of consumers' confidence level in the economy, based on their personal financial situation, current economic conditions, and future economic expectations. Consumer sentiment has an impact on spending behaviour, with high sentiment leading to increased spending and low sentiment leading to reduced spending.

Media Consumption Tracker
(n=192,140)



Kasi Insight's Media Consumption Tracker monitors consumer preferences for information sources monthly. It equips advertisers with valuable insights, enabling them to refine strategies, improve targeting, and enhance overall campaign effectiveness across the diverse African landscape.

Sustainability Tracker
(n=15,929)



Kasi Insight's Sustainability dataset provides an in-depth understanding of sustainability practices in various industries. It offers valuable insights that can drive innovation for businesses and policymakers. The data allows for a granular analysis by sector and region, enabling a nuanced understanding of different demographic groups' approaches and strategies toward sustainability.

Financial Freedom Tracker
(n=28,333)



Kasi Insight's Financial Freedom dataset provides an in-depth understanding of the concept of financial freedom in Africa. It offers valuable insights that can drive product innovation for banks and other financial institutions. The data allows for a granular analysis by age group and gender, enabling a nuanced understanding of different demographic groups' financial goals and strategies.



THE KASI FRAMEWORK

Brings customer centricity to life in 3 steps

Define the 4 key pillars of wellbeing



Health



Finance



Work



Play

Translate, survey & analyze



4000+ unique questions



12000 interviews per month



Advanced Statistics & AI

Generate data, trends & insights



70M+ data points



600+ datasets



500+ analysis



420M

Gen Z Population

250B

Annual Spending Power
(est. in USD)

+15%

Purchasing Power Growth
(5-year est.)

- **Economic Growth** - Many African economies are experiencing growth, leading to **increased disposable incomes and an expanding middle classes**, particularly among the younger generation.
- **Purchasing Power Growth** - Young people are pivotal in shaping consumer trends and preferences as they aspire to a higher standard of living and **are willing to spend on quality products and services**.

Key Findings

Solving the Gen Z paradox to unlock growth in Kenya

Gen Z is driving transformative shifts in Kenya. Harnessing their collective voice, they are setting new benchmarks for ethical practices and consumer expectations, demanding products and experiences that deliver on promises.

At core Gen Z are global dreamers

They emerged as global dreamers, captivated by a vast world rich with opportunities. Their dreams were powered by an unprecedented access to global cultures, technologies, and ideologies, fostering a sense of belonging to a large, interconnected world. This generation was initially motivated by the idealistic view of a borderless global community, aiming to participate in and contribute to a broader, universal narrative.

Where they see opportunities

Gen Z identified numerous opportunities to harness their unique skills and perspectives. With a natural propensity for digital fluency and social media, they leveraged these tools not only to connect and communicate but also to initiate change. This ability to see and seize opportunities has been instrumental in their transition from being mere participants in a global dialogue to becoming influencers and changemakers in their own rights.

But they became local activists

Despite their global upbringing, Gen Z gradually recognized the significance of localized action in achieving sustainable change. Witnessing firsthand the challenges their communities faced, they shifted their focus from global-scale dreams to local realities, for example, the successful #RejectFinanceBill2024 movement.

That paradox is redefining brand-consumer relationships

This intricate blend of global awareness and local activism has fundamentally altered the dynamics between brands and consumers. Gen Z demands that brands not only talk the talk but also walk the walk – emphasizing transparency, sustainability, and ethical responsibility.

54M

Population
(2023 est.)

79%

Gen Zers want to
migrate

13%

Interest Rate
(June 2024)

4.6%

Inflation Rate
(June 2024)

12.7%

Unemployment Rate
(2023 est.)

87%

Internet Penetration
(2023)

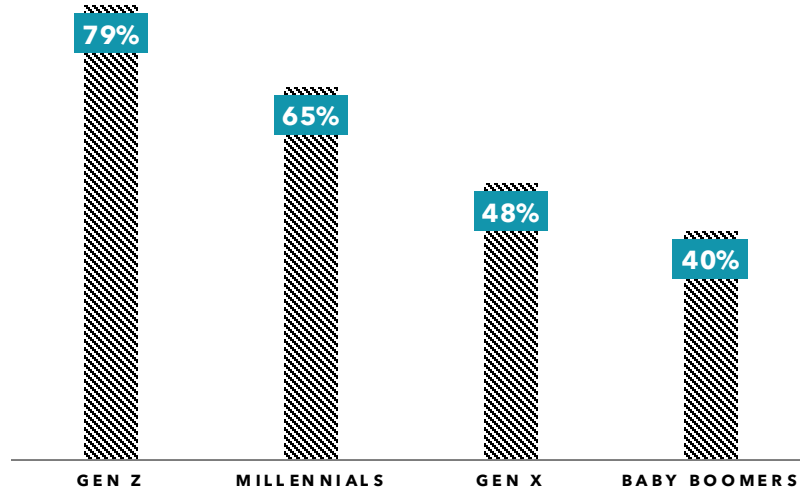
56 / 190
countries

Ease of Doing Business
(2020 World Bank ranking)

Global Dreamers: Seeking Opportunities Abroad

Gen Z have unmet ambitions locally, are eager to move abroad for better opportunities

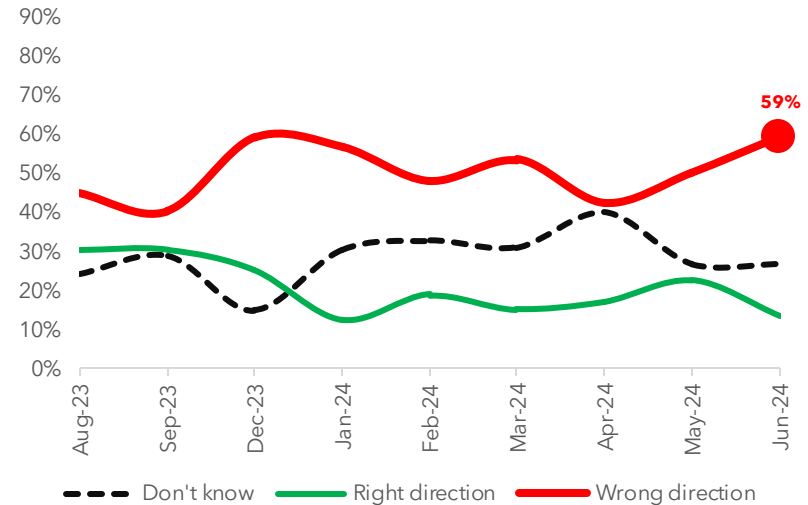
Gen Z's willingness to migrate is **higher** compared to other generations, reflecting a **desire to change their current situation**, exacerbated by **poor job prospects and a lack of opportunities** in the country



Source: Kasi Insight - Audience Intelligence

Q. If given the opportunity, will you move to a different city, state, or country in pursuit of better income generating opportunities?

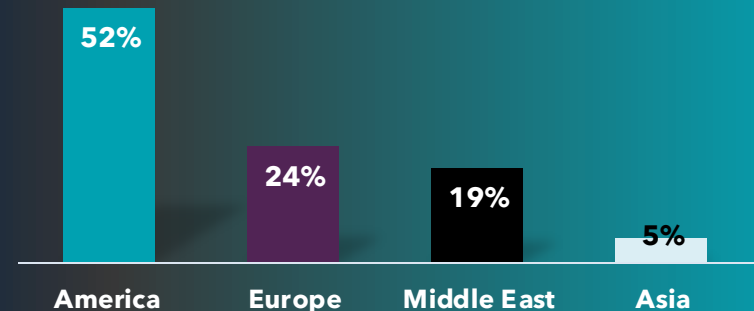
For Gen Z, sentiment about the country's direction has **worsened** since August 2023, with disapproval peaking at 57% in January and 59% in June 2024, indicating a **strong disapproval of the current trajectory**.



Source: Kasi Insight Economic Intelligence (Gen Z)

Q. Do you think your country is heading in the right direction or the wrong direction?

As Global Dreamers, Gen Z are eager to move abroad for better job opportunities and financial freedom, motivated by **59%** believing their home country isn't heading in the right direction. America emerges as the top destination, preferred by **52%** of these individuals, followed by Europe at **24%**. This reflects their pursuit of greater opportunities in places they see as offering more potential.



Source: Kasi Insight - Audience Intelligence (Gen Z)

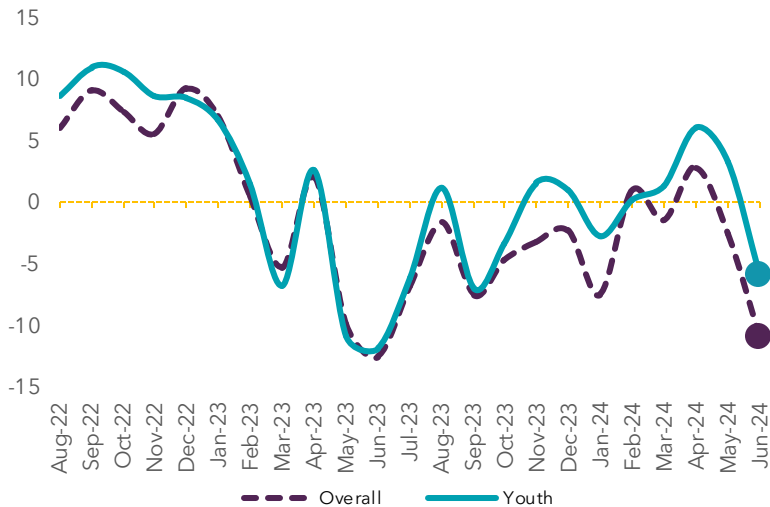
Q. Which destination are you considering migrating to for better job opportunities?



Local Activists - The Kenya Gen Z Revolution

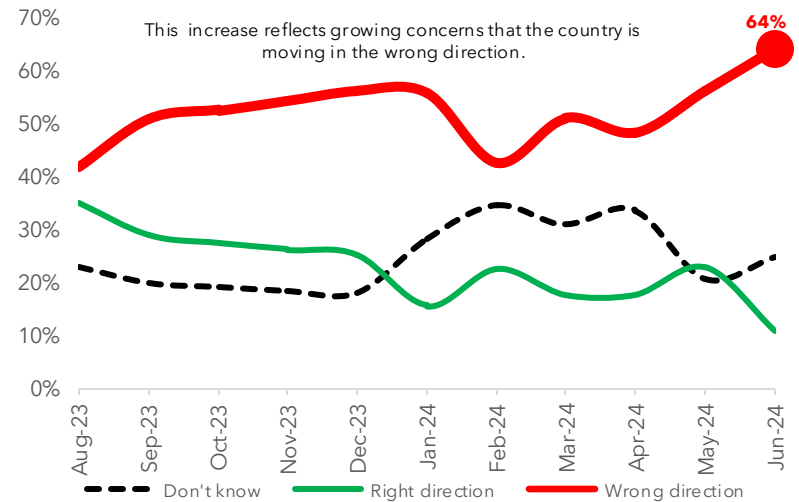
Growing public discontent, scarce job prospects, and widespread concern about the country's direction sparked a revolution

Consumer sentiment has been decreasing continuously and has **never recovered** since the **2022 General election**



Source: Kasi Insight Economic Intelligence - Consumer Sentiment Index

Consumer pulse has shown a **clear negative trend** since August 2023, peaking at **64% in January and June 2024**

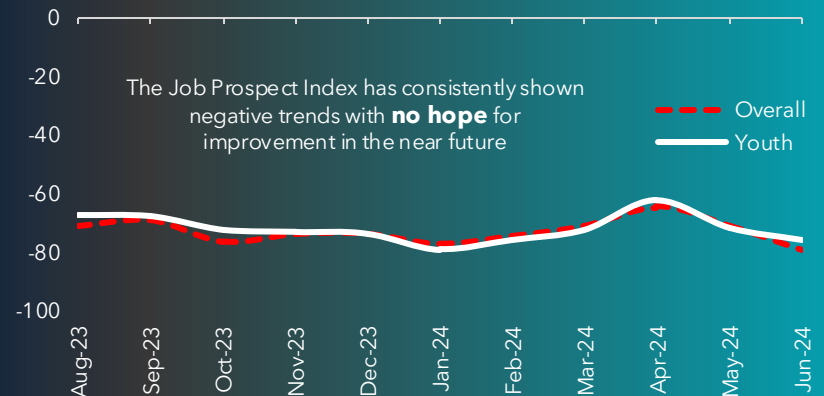


Source: Kasi Insight Economic Intelligence

Q. Do you think your country is heading in the right direction or the wrong direction?

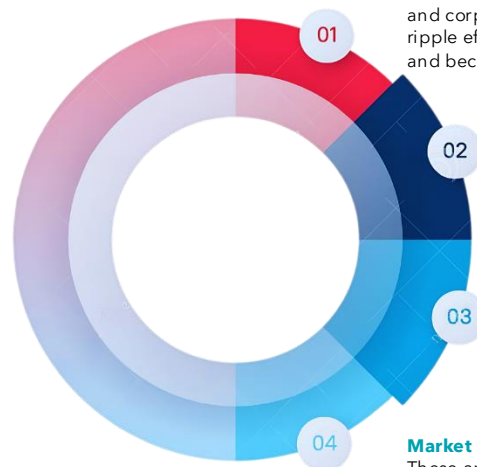
The Gen Z-led protests, sparked by the 2024 Finance Bill, showcased strategic social media use for mobilization, using platforms like **TikTok, Instagram, and X** with hashtags like **#RejectFinanceBill2024**.

These decentralized, leaderless protests reflect a tech-savvy, broad approach to activism, focusing on **systemic issues** like **corruption** and **high living costs**, marking a significant shift in public engagement.



Source: Kasi Insight Economic Intelligence - Job Prospect Index

Four key segments to understand Gen Z paradox



Ethical Influencers

As champions of ethical behavior, Ethical Influencers inspire both consumers and corporations to adopt more sustainable practices. Their efforts create a ripple effect, fostering a marketplace where responsible behavior is rewarded and becoming a key driver of long-term growth.

Global Pathfinders

They symbolize the universal pursuit of better opportunities and the importance of creating inclusive environments that attract and retain talent. Their journey and impact highlight the interconnectedness of global development and the role of human capital in driving economic and social progress.

Vocal Activists

These are the catalysts for societal transformation, ensuring that public policies and norms reflect the values of fairness, sustainability, and inclusivity. Their relentless advocacy brings about meaningful change, laying the foundation for a more equitable and progressive society.

Market Shapers

These are the guardians of ethical standards in the business world. Their insistence on transparency and accountability ensures that the market rewards sustainable and responsible practices. By doing so, they contribute to building a resilient economy that supports long-term growth and stability.

Engaging the Gen Z Segments

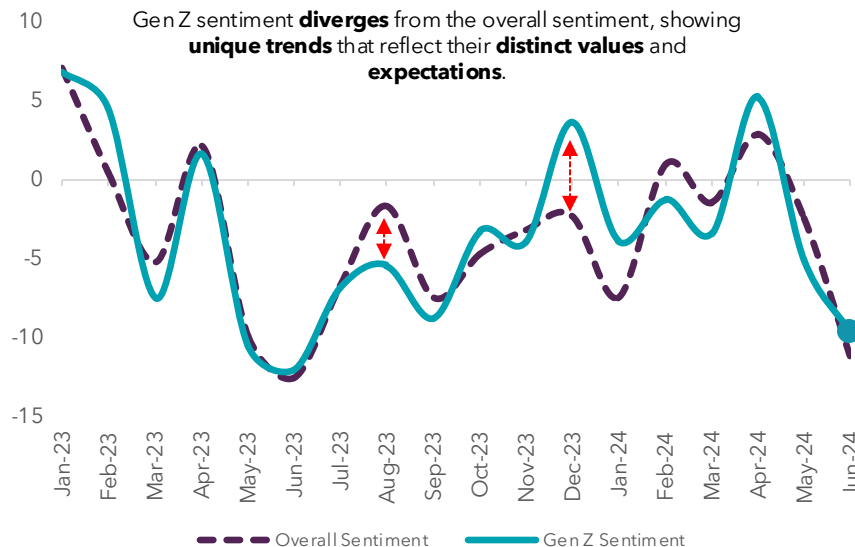
To effectively cultivate growth with Gen Z, brands must strategically innovate and authentically engage across several key areas, starting with a genuine commitment to transparency and ethical standards. Integrating these values into core operations and communication strategies will resonate deeply with Ethical Influencers who prioritize sustainability and social responsibility. By leveraging platforms like Instagram, X, TikTok, and Snapchat, and openly discussing initiatives around sustainable practices and ethical sourcing, brands can build trust and establish credibility with this discerning demographic. Tailoring messaging and offerings to reflect international perspectives can appeal to the global aspirations of Global Pathfinders through promoting global internships, products that facilitate mobility, or services that connect them with international experiences.

For Vocal Activists, brands must not only listen but also actively support the causes this group champions, participating in policy advocacy or creating platforms for civic engagement. Aligning with the values and activism of this segment can drive meaningful change and enhance brand loyalty. Additionally, to meet the demands of Market Shapers, brands must respond swiftly to trends in ethical consumption by offering innovative products that align with social values, such as eco-friendly materials or fair labor practices. Demonstrating a commitment to sustainability and ethics can attract and retain consumers who prioritize these values, ensuring long-term growth and market relevance.



The New Influencers: Digital, Ethical, Sustainable

Understanding the segment where connectivity meets conscience



Source: Kasi Insight Economic Intelligence - Consumer Sentiment Index

Demand for Ethical Transparency

88% Of Gen Zers are likely to trust and remain loyal to brands that maintain transparency about their business operations and sourcing. This compares to only 58% of older generations, indicating a much stronger emphasis on transparency among younger consumers

Sustainability as a Standard

For Gen Z, a brand's commitment to environmental sustainability is a crucial factor influencing their purchasing choices.

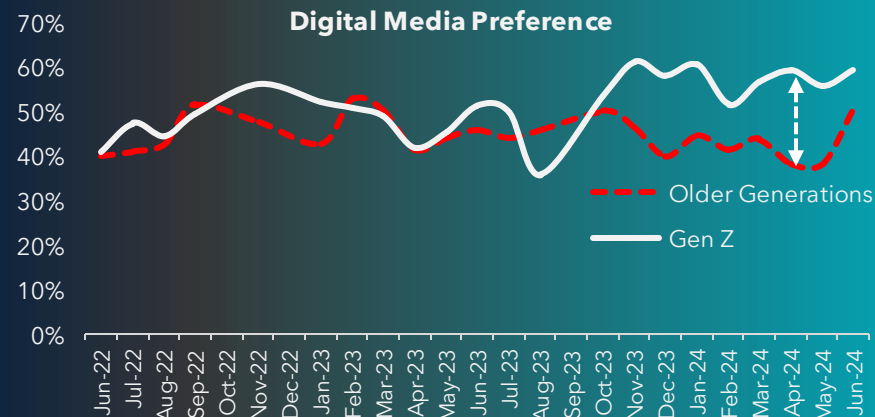
3 in 4 Gen Z consumers are influenced by a brand's environmental efforts, showing a strong preference for companies that actively work to reduce their environmental impact. This compares to only 45% of other generations, highlighting Gen Z's significant inclination towards sustainability.

Digital Native Advantage

About **80%** of Gen Z own or have access to a smartphone, making them highly proficient with digital technology, compared to only **55%** of older generations. This widespread connectivity enables **75%** of Gen Z to use social media as their primary source for news and brand engagement, significantly influencing their purchasing behavior.



Digital Media Preference



Source: Kasi Insight - Media Tracker in Kenya

Q. And in general, which of the following do you consider to be your MOST trusted source for getting information?
[Traditional vs Digital]

Introducing The Big 2 Brands

Global brands are brands that are recognized and sold in multiple countries across the world. These brands maintain a consistent identity, image, and often similar products or services regardless of the geographic market. Examples of global brands include Coca-Cola, Nike, Apple, and McDonald's.

Key Characteristics of Global Brands

- **Consistent Branding:** They maintain a uniform brand identity, including logos, taglines, and brand messaging across different markets.
- **Economies of Scale:** Global brands benefit from large-scale production and distribution, which can reduce costs and increase efficiency.
- **Global Marketing Campaigns:** These brands often run worldwide marketing campaigns, leveraging global media channels and platforms to reach a broad audience.
- **Standardized Products:** While some customization may occur to meet local preferences, the core product or service remains largely the same.
- **Strong Global Presence:** They have a widespread physical and online presence, making their products or services accessible in various regions.

Local brands, on the other hand, are those that operate primarily within a specific geographic area or country. These brands cater to the tastes, preferences, and cultural nuances of their local market.

Key Characteristics of Local Brands

- **Localized Branding:** They tailor their brand identity, messaging, and marketing efforts to resonate with the local culture and consumer preferences.
- **Adaptability:** Local brands are often more flexible and quicker to respond to changes in the local market.
- **Limited Scale:** They usually operate on a smaller scale compared to global brands, with a focus on a specific region or country.
- **Niche Market:** Local brands may cater to niche markets, offering products or services that are specifically designed to meet local needs.
- **Strong Local Connection:** They often have a deep understanding of the local market and build strong relationships with local consumers.

Key Differences

	Global brands	Local brands
Market Reach	Broader market reach, spanning multiple countries	Focus on a specific region or country
Brand Consistency vs. Customization	Prioritize consistent branding and product offerings	Customize their approach to suit local tastes and preferences
Economies of Scale	Benefit from economies of scale in production and distribution	May have higher per-unit costs due to smaller-scale operations
Marketing Strategies	Often use uniform marketing strategies across different regions	Create tailored marketing campaigns to engage local consumers
Flexibility and Responsiveness	May face challenges in adjusting their strategies for different regions	Typically, more agile and can quickly adapt to changes in the local market

Global Brands

Glocalization -- Brands and Products That Inspire Local Change

Glocalization is a blend of "globalization" and "localization." It describes the adaptation of globally recognized products, services, and brands to fit local cultures, preferences, and behaviors. It also encompasses how global trends and values inspire local actions and changes.

Key Aspects of Glocalization

- ▶ **Adaptation:** Global brands tailor their products, services, and marketing strategies to meet the specific needs and preferences of local markets.
- ▶ **Local Impact:** Global trends, such as sustainability or technological innovation, drive local initiatives and changes in consumer behavior.
- ▶ **Cultural Sensitivity:** Global brands respect and incorporate local customs, traditions, and values into their offerings.
- ▶ **Hybrid Strategies:** Combining global efficiency with local relevance, glocalization allows brands to maintain their global identity while resonating with local consumers.

TOP 3 STRATEGIES OF OUR RECOMMENDED PLAYBOOK

1. Consumer Research and Cultural Understanding

Leverage decision intelligence (DI) to gather real-time, aggregated and trended consumer data to unpack consumer behaviors, preferences, cultural nuances and trends. Ensure your DI process combines human intelligence (experts) with data.

2. Adaptation of Products and Services

Adapt products to meet local tastes, dietary restrictions, and lifestyle needs. Introduce new products or variations that cater to local preferences. Adjust packaging design, language, and information to align with local regulations and cultural expectations. Set prices that reflect local purchasing power and economic conditions.

3. Tailored Marketing and Communication

Create marketing campaigns that resonate with local values, traditions, and events. Use local languages and dialects. Partner with local influencers and celebrities to build trust and connect with the local audience authentically. Choose media channels that are popular and trusted in the local market, including social media platforms, TV, radio, and print.



While McDonald's maintains its core brand identity worldwide, it adapts its menu to local tastes. For example, in India, McDonald's offers vegetarian options and items like the McAlloo Tikki burger to cater to local dietary preferences.

Local Brands

LIGA -- Brands and Products That Inspire To Dream Big

Local inspiration for global aspiration (LIGA) captures the trend where local brands and products motivate consumers to think beyond their immediate environment, encouraging them to pursue larger ambitions and make significant changes in their lives.

Key Aspects of LIGA

- ▶ **Empowerment through Local Success Stories:** Local brands often showcase success stories that resonate with the community, demonstrating that significant achievements are possible regardless of one's starting point.
- ▶ **Cultural Pride and Global Vision:** Local brands that celebrate cultural heritage while incorporating modern, globally appealing elements can instill a sense of pride and ambition in consumers.
- ▶ **Community-Driven Innovation:** Local brands often drive innovation tailored to local needs, which can then serve as a model for broader application.
- ▶ **Role Models and Influencers:** Local figures associated with these brands can become influential role models, inspiring others to pursue their aspirations.

TOP 3 STRATEGIES OF OUR RECOMMENDED PLAYBOOK

1. Understand and Celebrate Local Heritage

Embrace and honor local heritage by using decision intelligence (DI) to explore cultural traditions, values, and community-driven preferences. Combine data insights with expert knowledge to deeply understand how heritage influences consumer behavior and emerging trends.

2. Showcase Local Success Stories

Share stories of local individuals or groups who have achieved notable success, both within the community and beyond. Produce and distribute content (videos, articles, social media posts) that showcases these success stories and their journeys. Use local media channels to amplify these stories and reach a wider audience.

3. Develop Globally Appealing Products with Local Roots

Create products that merge local cultural elements with global trends and tastes. Ensure high quality standards and authenticity in your products to appeal to both local and global markets. Develop marketing strategies that emphasize the unique local elements of your products while highlighting their global appeal.



Tata Group (India): Starting as a local business, Tata has become a global conglomerate, inspiring many Indian entrepreneurs to think globally and aim high.

Telco Brands

Local Empowerment through Connectivity

This captures how telecommunications companies (telcos) use their infrastructure, services, and initiatives to inspire consumers to pursue big dreams while making impactful changes in their local communities.

Key Aspects of LEC

- ▶ **Access to Information and Resources:** Telcos provide reliable internet and communication services that enable consumers to access educational content, job opportunities, and global knowledge, empowering them to achieve their dreams locally.
- ▶ **Community-Centric Initiatives:** Telcos support local communities through initiatives such as digital literacy programs, local entrepreneurship support, and community development projects.
- ▶ **Technological Innovation:** By introducing cutting-edge technologies like 5G, telcos enable local businesses and individuals to innovate and compete on a global scale.
- ▶ **Local Success Stories:** Telcos highlight and promote local individuals and businesses that have used connectivity to achieve remarkable success, inspiring others to follow suit.

TOP 3 STRATEGIES OF OUR RECOMMENDED PLAYBOOK

1. Understand Connectivity Needs and Gaps

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MTN's Digital Skills Academy: MTN offers digital skills training to local communities in Africa, enabling individuals to leverage technology for personal and professional growth.

Banking Brands

Local Empowerment through Financial inclusion

This highlights how banks can inspire consumers to pursue ambitious goals and make impactful changes within their local communities by providing access to financial resources, education, and support.

Key Aspects of LEC

- ▶ **Access to Financial Services:** Banks offer essential financial services such as savings accounts, loans, and credit facilities, enabling consumers to manage their finances and invest in their futures.
- ▶ **Financial Literacy and Education:** Banks provide financial education programs to help consumers understand money management, investment, and savings, empowering them to make informed financial decisions.
- ▶ **Support for Local Businesses:** Banks support local entrepreneurs and small businesses through tailored financial products, mentorship programs, and funding opportunities.
- ▶ **Community-Centric Initiatives:** Banks engage in community development projects, contribute to local causes, and promote sustainable practices that benefit the local economy.

TOP 3 STRATEGIES OF OUR RECOMMENDED PLAYBOOK

1. Understand Financial Needs and Gaps

Identify and address financial needs and gaps by using decision intelligence (DI) to gather real-time, aggregated, and trended consumer data. Analyze these insights to understand how financial behaviors, spending patterns, and local economic factors shape consumer decisions. Integrate expert knowledge with data to create a well-rounded understanding of the financial landscape and its impact on consumer needs.

2. Showcase Local Success Stories

Share stories of local individuals or groups who have achieved notable success, both within the community and beyond. Produce and distribute content (videos, articles, social media posts) that showcases these success stories and their journeys. Use local media channels to amplify these stories and reach a wider audience.

3. Leverage Technology for Financial Inclusion

Introduce and promote digital banking solutions that make financial services more accessible and convenient for local consumers. Provide training and resources on how to use digital banking tools effectively.



*Equity Bank (Kenya)
Initiative: Financial Inclusion and Empowerment programs such as the Wings to Fly Program provide scholarships to bright students from financially challenged backgrounds.*

What's Next

Anticipation of Pan-African Spread

As the Gen Z trend in Kenya begins to influence broader African markets, organizations should prepare to scale their successful strategies across borders. This involves understanding and adapting to the diverse cultural landscapes in Africa, ensuring products and services are relevant and appealing across different regions. For businesses, this could mean expanding digital services, sustainable practices, or Gen Z-focused products continent-wide.

Holistic Integration Across Spheres

The influence of Gen Z is expected to permeate all areas of society, from politics and business to culture and education. Organizations should adopt a holistic approach in their strategic planning, ensuring that Gen Z values are integrated into business models, corporate governance, and social responsibility initiatives. In politics, engaging Gen Z through digital platforms can make political processes more transparent and participatory, potentially leading to higher engagement rates and informed policymaking.

Proactive Strategic Development

The key to capitalizing on the emerging trends among Gen Z is to develop a proactive strategy that addresses their needs and preferences before they become mainstream demands. This involves investing in research and development, innovating new products, and rethinking marketing strategies to appeal to this demographic. Organizations should also consider forming strategic alliances with startups and tech companies to stay ahead of digital trends and leverage new technologies to engage with Gen Z effectively.



Actions to Consider

1

PAN-AFRICAN PLATFORMS

Develop platforms that not only resonate with Gen Z's values but also cater to the linguistic and cultural diversity of the African continent. This could involve multilingual support, local content creation, and region-specific customization.

2

GEN Z DECISION INTELLIGENCE

Harness UWG and Kasi Insight's capabilities to create a Gen Z-focused Decision Intelligence platform. This system incorporates real-time feedback from Gen Z advisory boards on products and policies, ensuring decisions align with their preferences and driving effective market strategies. This approach transforms Gen Z insights into actionable intelligence for swift and informed decision-making.

3

SUSTAINABLE GROWTH INITIATIVES

Implement sustainability as a core aspect of business operations. This could include setting up green supply chains, investing in sustainable technologies, and publicly committing to environmental and social goals that resonate with Gen Z's values.

Kasi Insight

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
Contact us to explore how our solutions can transform your business.

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UWG Africa

We are dedicated to empowering brand and business growth through the power of authentic storytelling. UWG Africa is the collaborative vision of Two Tone Global and UniWorld Group Inc. (UWG), two pioneering Black-owned agencies united by a shared goal to transform Africa's media and advertising landscapes.

At UWG Africa, we provide insights that offer a holistic market and connectivity view, driving data-informed strategies that result in impactful media and content recommendations. Our core services include strategic media planning and buying, digital innovation and branded content, comprehensive marketing solutions. We serve clients across the continent, with offices in Johannesburg, South Africa and Nairobi, Kenya.

Reach out today and let's partner to unlock the growth potential of Gen Z and create lasting impact in the marketplace.

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