



SHUJAAZ

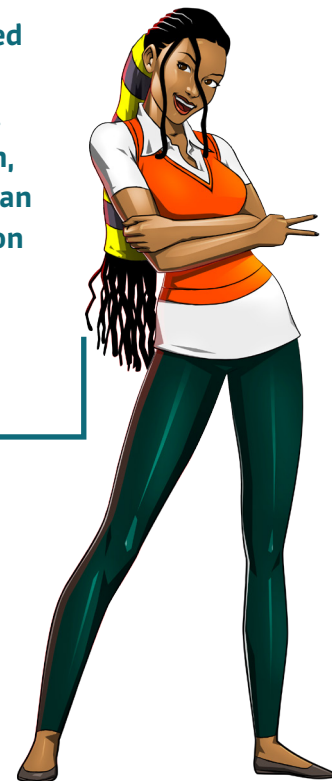
#shujaaz360

June 2016



- Shortage of money defines lifestyles: making quick & easy money is the key driver in youth behaviour. Long-term opportunities are forfeited for quick financial wins
- Boys are the overwhelming priority when it comes to the distribution of tools (including digital) as they are considered more likely to success financially than girls
- Group dynamic trumps any individual thoughts and desires. A group creates a comfort zone for young people – in return, the group demands compliance and contribution. A group can both encourage and impede a member's action depending on how it might reflect on the unity and image of the group.
- Family - as one of the groups where young people belong – is engaged in every aspect of young Tanzanians' lives from approving a spouse to sponsoring a business.

**IN A MONEYLESS ECONOMY, YOUNG TANZANIANS
LOOK FOR WAYS TO EARN A LIVING THAT
GUARANTEE FAST RETURNS, "DIGNIFIED" LIFESTYLES
AND APPROVAL OF THE GROUP**



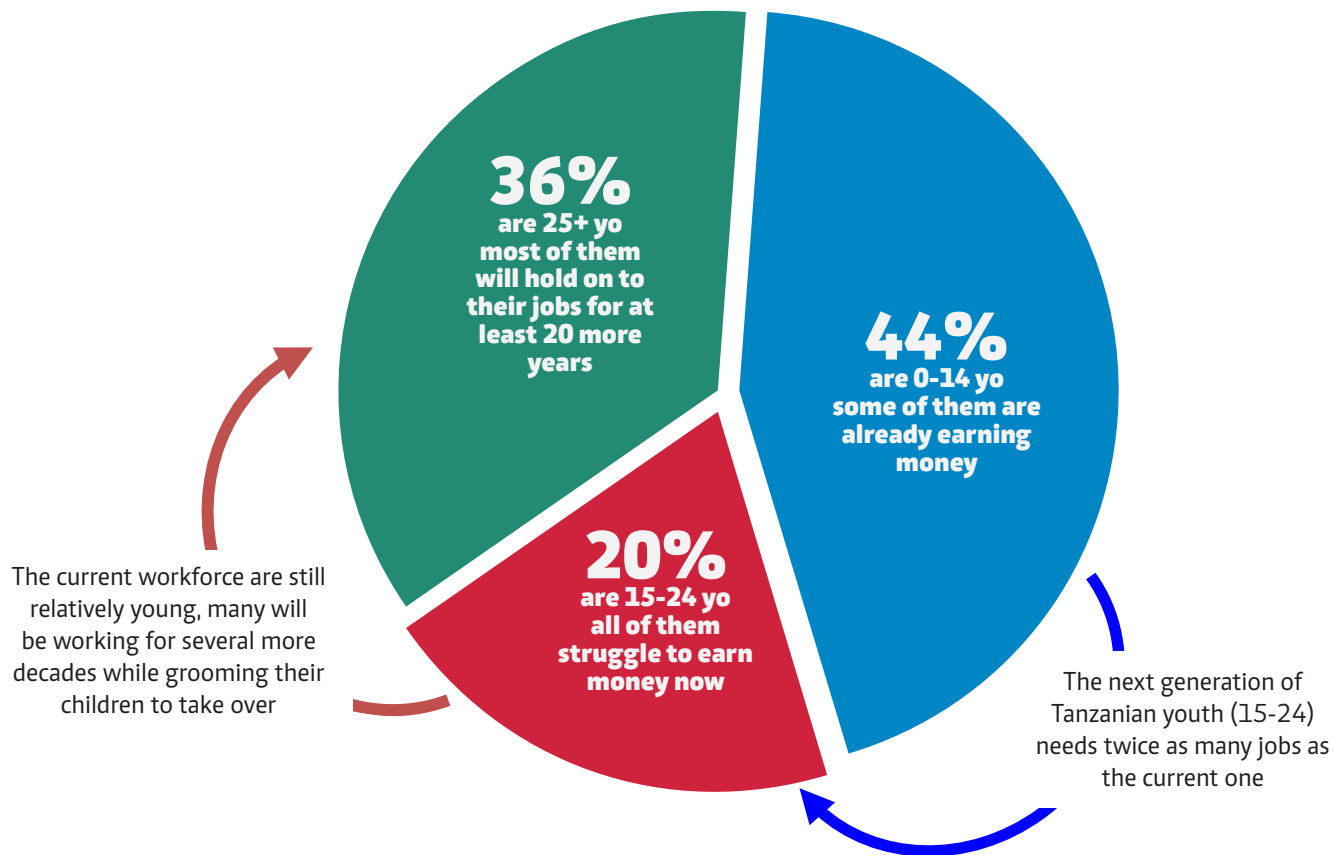
Tanzanian Youth Profile

9.7 Million 15-24 Year Olds, 1 in 5 Tanzanians



- According to the 2012 Population and Housing Census in Tanzania, young people 15-24 years old constitute 20% of the total population of Tanzania, mainland and Zanzibar combined, http://nbs.go.tz/nbs/takwimu/census2012/Basic_Demographic_and_Socio-Economic_Profile_PopularVersion-KeyFindings_2012_PHC_EnglishVersion.pdf.

15-24 Year Olds Are Half of the Next Generation



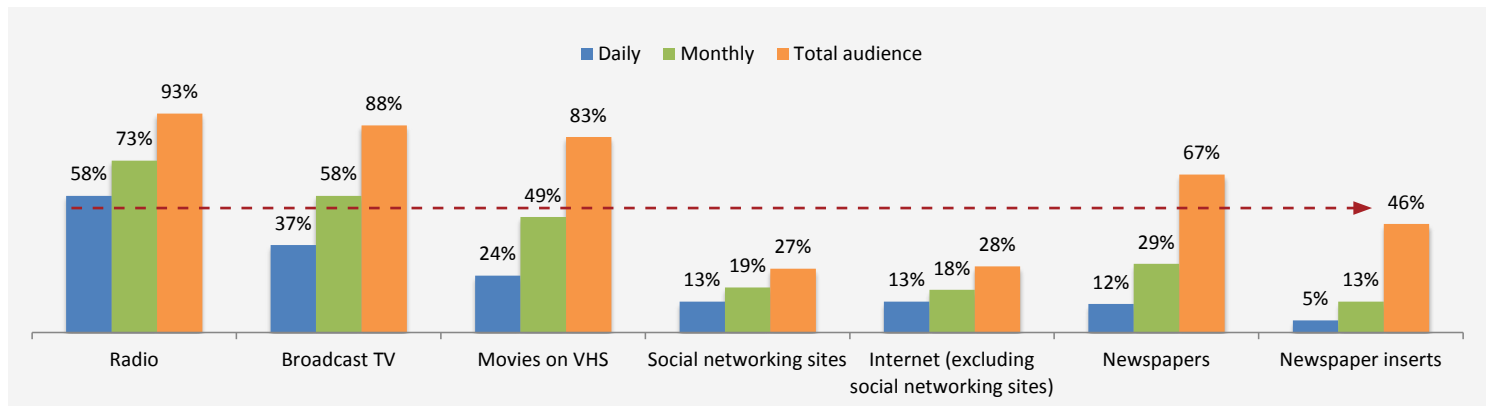
- The CIA World Factbook estimates that in 2015, 15-24 yo constituted 20% of the current population of Tanzania vs. those 0-14 yo, who constituted 44% of the total population (<https://www.cia.gov/library/publications/the-world-factbook/fields/2010.html>).

Total youths 15-24		15-19	20-24	
57% males	→	4%	19%	married or co-habiting
43% females		23%	45%	single and dating
32% urban	→	67%	26%	single not dating (but sexually active)
68% rural		6%	10%	it's complicated
47% are 15-19 yo	→	3%	8%	working (formal employment, self-employment, casual workers)
53% are 20-24 yo		37%	72%	have a side job/hustle
36% less than primary education				
38% primary completed or some secondary	→	4%	10%	have enough money to cover all their needs (and wants) most of the days
26% secondary completed and above		85%	93%	feel in charge of their lives
58% live in a household with 5+ people		66%	71%	believe their lives will be better in a year's time

- More than a third of Tanzania youth have not completed even the first stage of their formal education. With low literacy levels, their prospects for a formal job are very low and most rely on informal sources of income.
- While 9 in 10 young Tanzanians feel in charge of their lives, they are somewhat cautious about their future perspectives. Limited employment opportunities and financial struggles might be the reason for the cautious optimism as even among 20-24 yo only 1 in 10 make enough money to cover their daily expenses.

Media Preferences, Ownership and Use

74% of young Tanzanians use at least one medium daily,
The majority (**58%**) stick to one preferred daily source of information - **Radio**



- Radio is a leading medium among young Tanzanians. TV as the second most commonly used medium is lagging behind.
- Daily radio audience is twice larger than the total audience for social media and the internet.
- The cycles of printed media might be responsible for the fact that daily readership of printed media is about 1 in 10 Tanzanian young people while total audience of print is 71% of all youth.
- Due to low access to digital media, 9 in 10 users of traditional media – TV, radio, printed media and DVD/VHS access it old-style, via analogue.
- 84% of internet users and 85% of social networking site users access these media on a mobile phone. Users of computers are a small minority.

A mobile phone has a strong presence in young peoples' lives
Average monthly spending on airtime amounts to a third of monthly income

94%

live in a household with at least one mobile phone



64%

have their own mobile phone



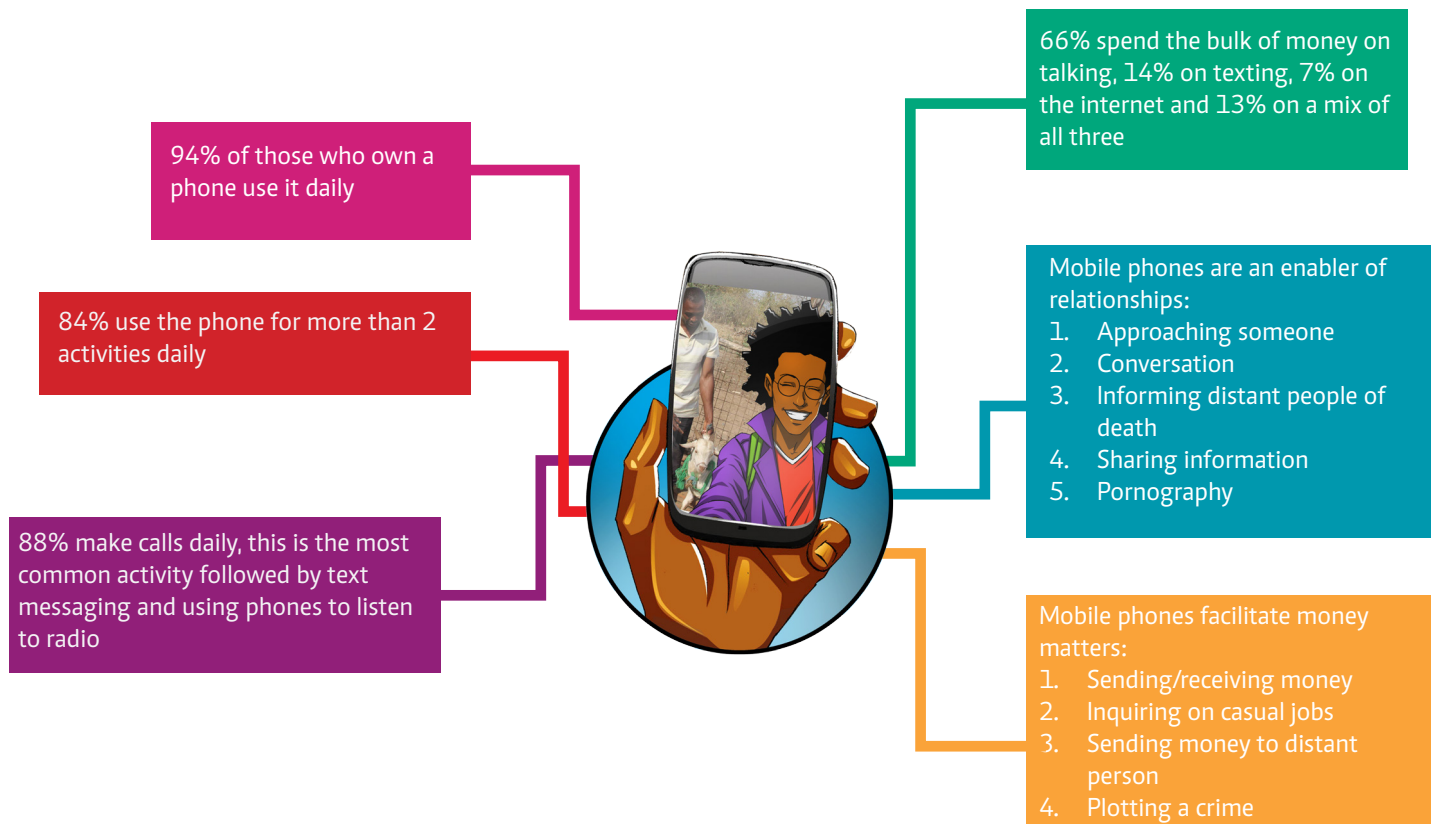
26% own a basic phone

29% own a feature phone

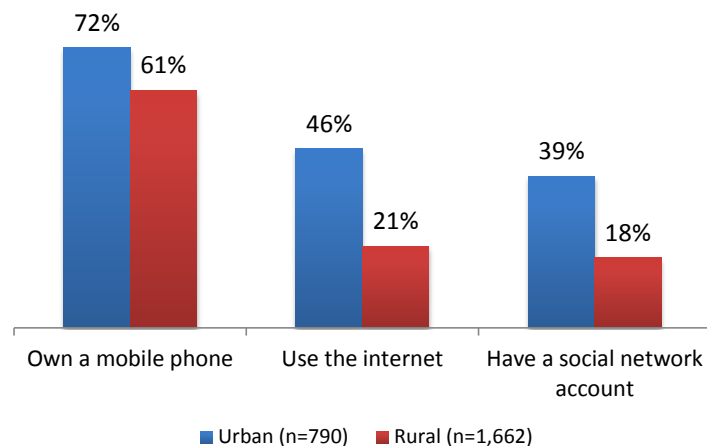
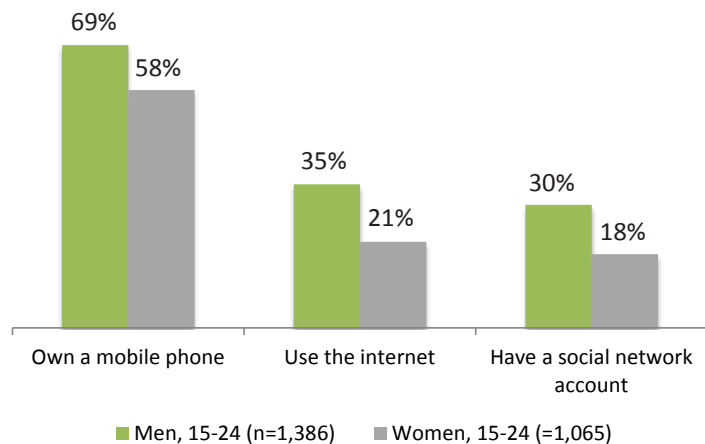
17% own a smartphone

- 4 in 5 mobile phone owners have either a basic or a feature phone. Smartphones are still rare and are mostly owned by urban youths, Dar es Salaam residents in particular.
- 7% of young people have more than 1 phone.
- On average, young Tanzanians report spending about TZSH 7,000 (\$3) a month on airtime, which is a third of their average monthly income.

**Mobile phones facilitate different aspects of young people's lives,
Communication is basic but many use Digital Financial Services**

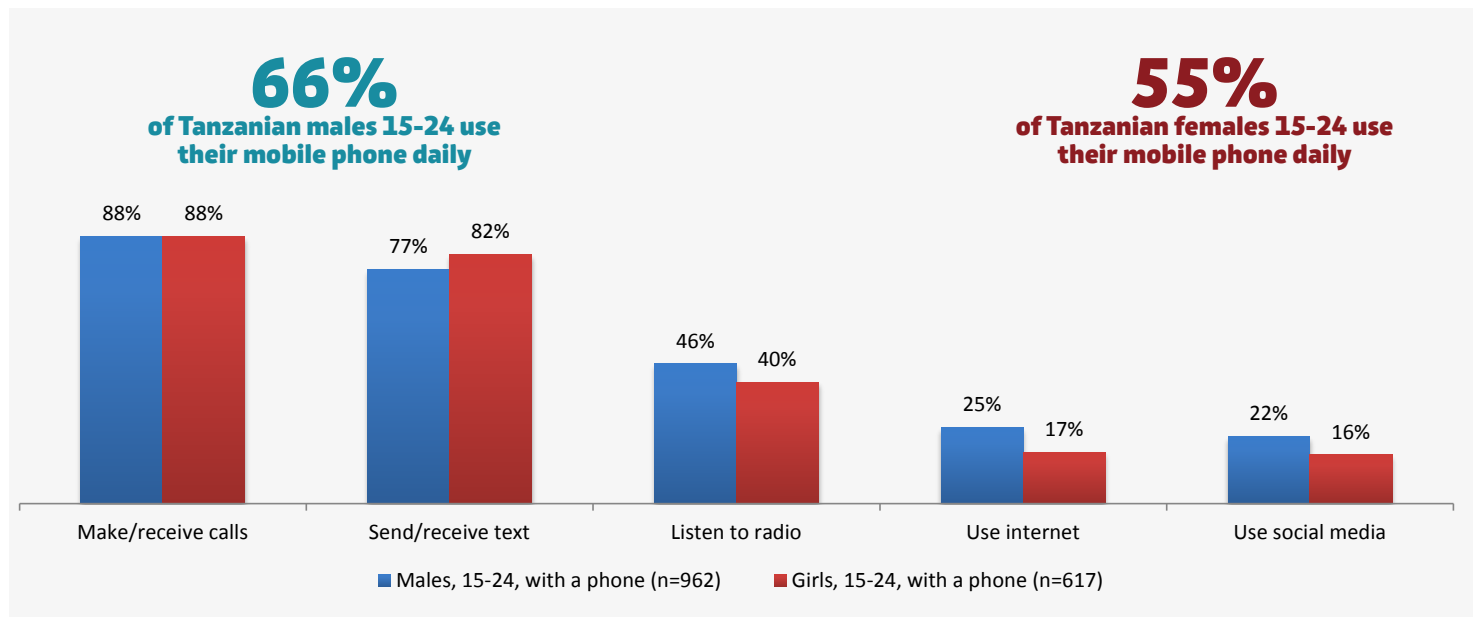


There is a dramatic gap in access to and use of digital media by gender and an even bigger gap between urban and rural youth



- Women are less likely to own a mobile phone than men. Since most online activities -- including the use of social networking sites -- happen mostly on a mobile phone, limited access to a mobile phone also means that fewer young females go online and use social networking sites, compared with males.
- The difference by location – urban vs. rural – is larger than that by gender. Urban residents are twice more likely to be online and to use social networking sites compared with their rural counterparts.

17% fewer girls use their phone daily compared with boys



- Young women are less likely to use their phone daily, but they are more active on their phones – 91% of those who use their phone daily use it for 2+ activities vs. 87% of men.
- When on their phones, females lean towards “traditional” activities – calling and texting – while men are actively using the internet and social networking sites.

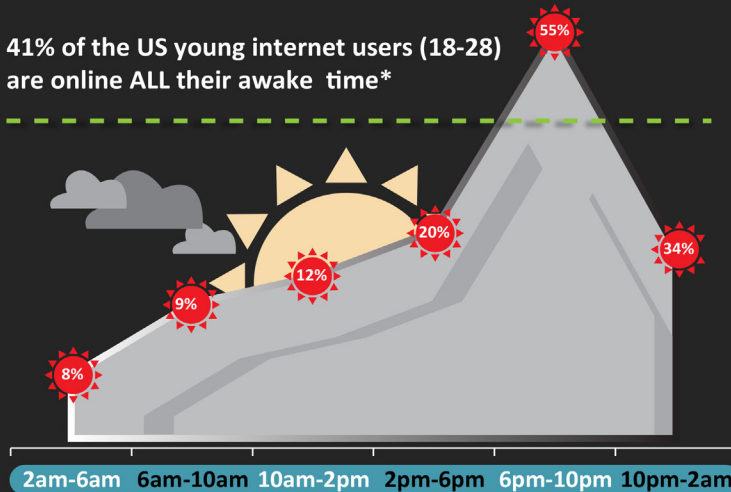
SUNSET INTERNET

LESS THAN A THIRD OF YOUNG TANZANIANS (29%) USE THE INTERNET ALMOST 9 IN 10 OF THEM ON A MOBILE PHONE

When do you usually use the internet?

% of all internet users, including users of social networking sites, n=933

41% of the US young internet users (18-28) are online ALL their awake time*



For each timeslot online, average time ranges a lot depending on whether a person has access to free wifi

Internet use starts climbing in the afternoon, reaching it's peak between 6pm and 10pm when more than half of all users are online. A third of the internet users continue their online activities through the night

An average user goes online 1-2 times a day, average time online ranges between 2 minutes and 2 hours

AVERAGE TIME ONLINE IN MINUTES



Facebook is the core of all online activities. Facebook is the very first destination from where young Tanzanians pick what they want to do – e.g., read news, chat with friends, post picture

A quarter of young Tanzanians (25%) and 85% of the internet users use social networking sites; of those 61% have accounts on more than one social network

91%



57%



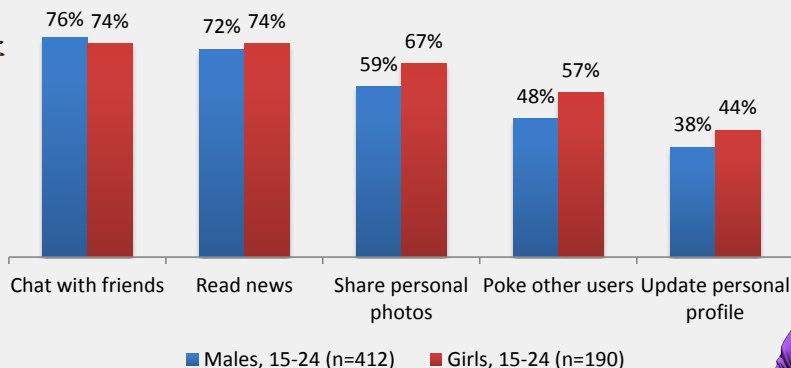
33%



8%



Top five social media activities



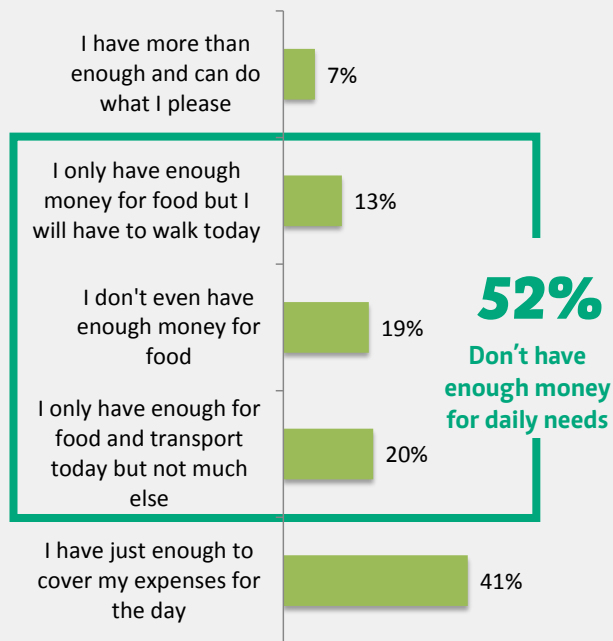
- In all social media activities aside from chatting with friends, young females are more active than their male counterparts.
- Aside from the listed social networking sites, Tanzanian young people report using Snapchat, Tango, Wechat, Telegraph, cmatch, and IMO.
- About half of respondents in our Field Test said they have the same identity on all social media accounts – mostly, for business purposes (artists attracting fans or hustlers developing their brand). Those with different identities hide their activities – mainly from parents.

- Radio and a mobile phone are the key touch-points between youth and media. Radio delivers easy daily entertainment while a mobile phone is a door to social networking space, where youth can find a range of opportunities, including jobs and hustles.
- Financial scarcity is responsible for gaps in access to technology by gender and location, - e.g., 77% of urban males 15-24 own a mobile phone compared with 54% of rural females. The gap gets bigger when comparing ownership of smartphones.
- When using mobile phones, girls lean towards passive activities (texting, reading news, poking others, updating their profiles) while boys are more active in engaging other people into conversations and joint activities.

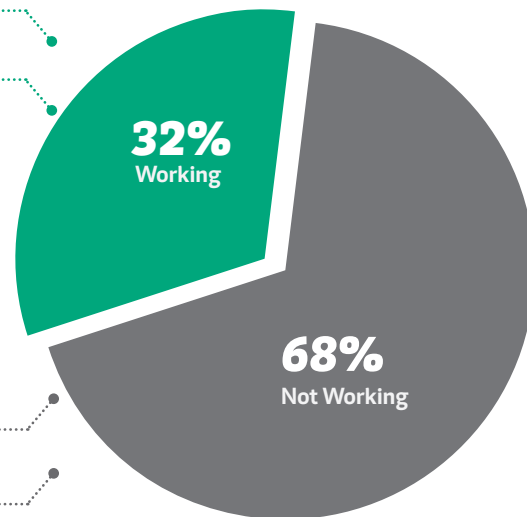
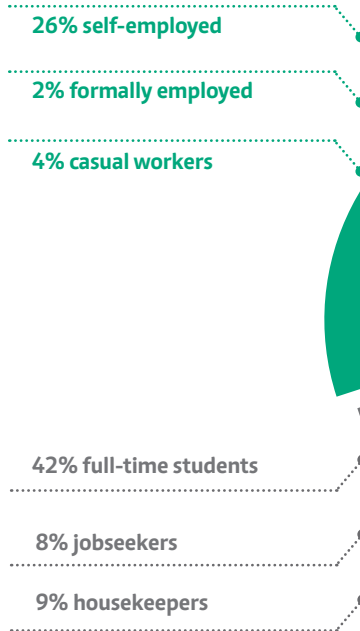
Employment, Livelihoods and Money Matters

Half of young people struggle every day to pay for food and transport.
Financial challenges push Tanzanian youth to leave school for work or marriage

When you wake up in the morning, how do you usually feel about your finances?

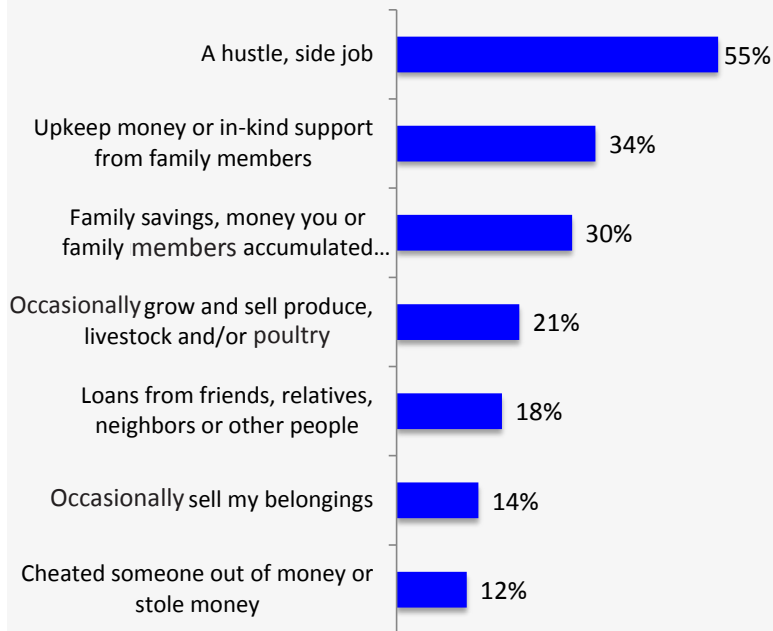


Youth have to create their own jobs as formal employment is non-existent



94% of young people have a source of income outside their main engagement
48% have 2+ additional income sources

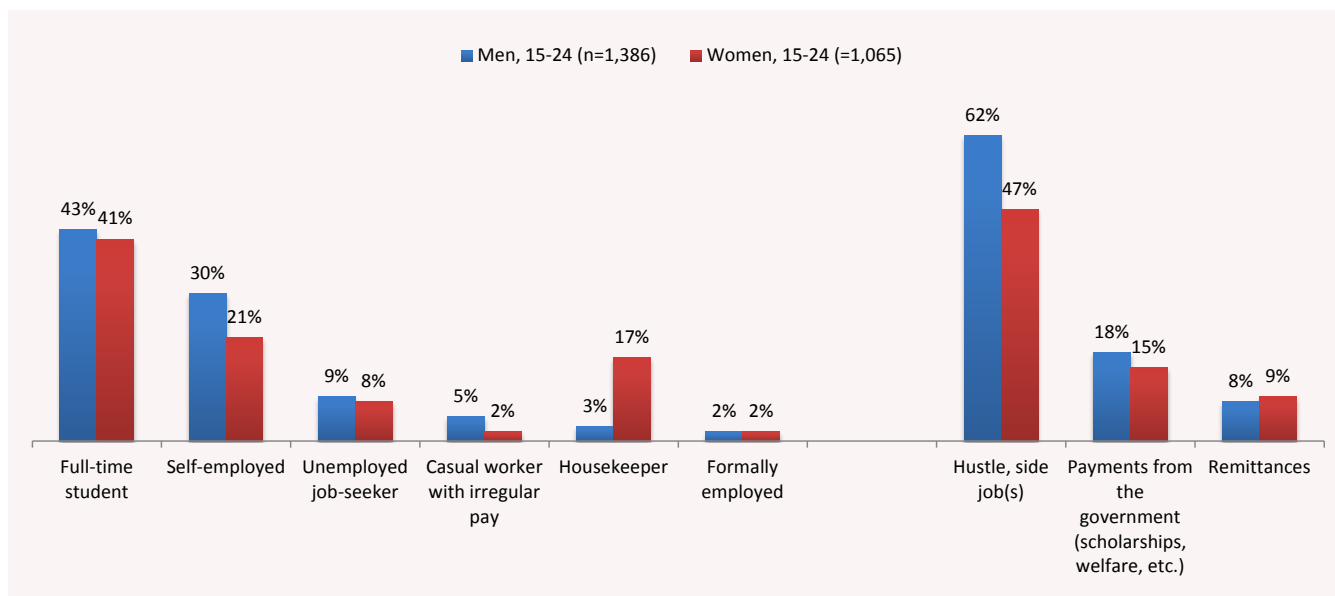
TOP SOURCES OF ADDITIONAL INCOME



52%
regularly start
their day with not
enough money for
daily needs

On average, young
people spend 3
times more than
they earn each
month: **TZSH
90,000 vs. TZSH
30,000**

Girls' are more likely to be housekeepers while boys pursue self-employment and/or other types of paid assignments



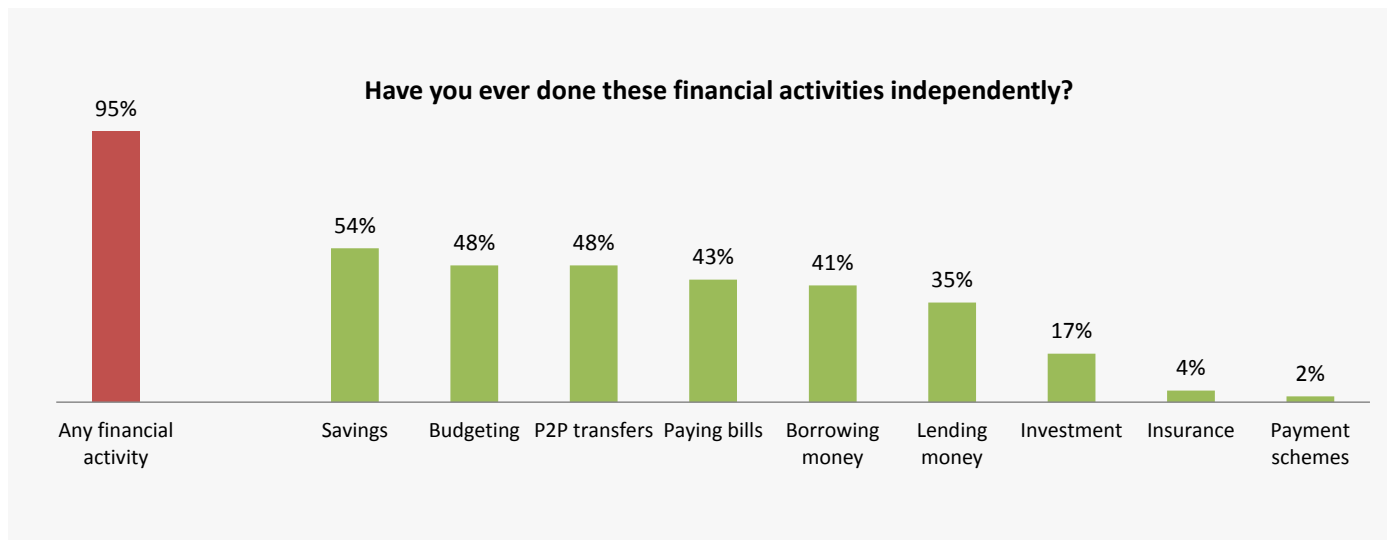
- Financial dependence on parents is common for females, even after they get married and have their own children, more so in rural areas.
- Social pressure to provide for families leads boys to resort to crime when other income options are not available, especially in urban areas.

Informal sector is busy with **55%** reporting side-jobs (aside from main self-employment);
26% among full-time students and **79%** among formally employed



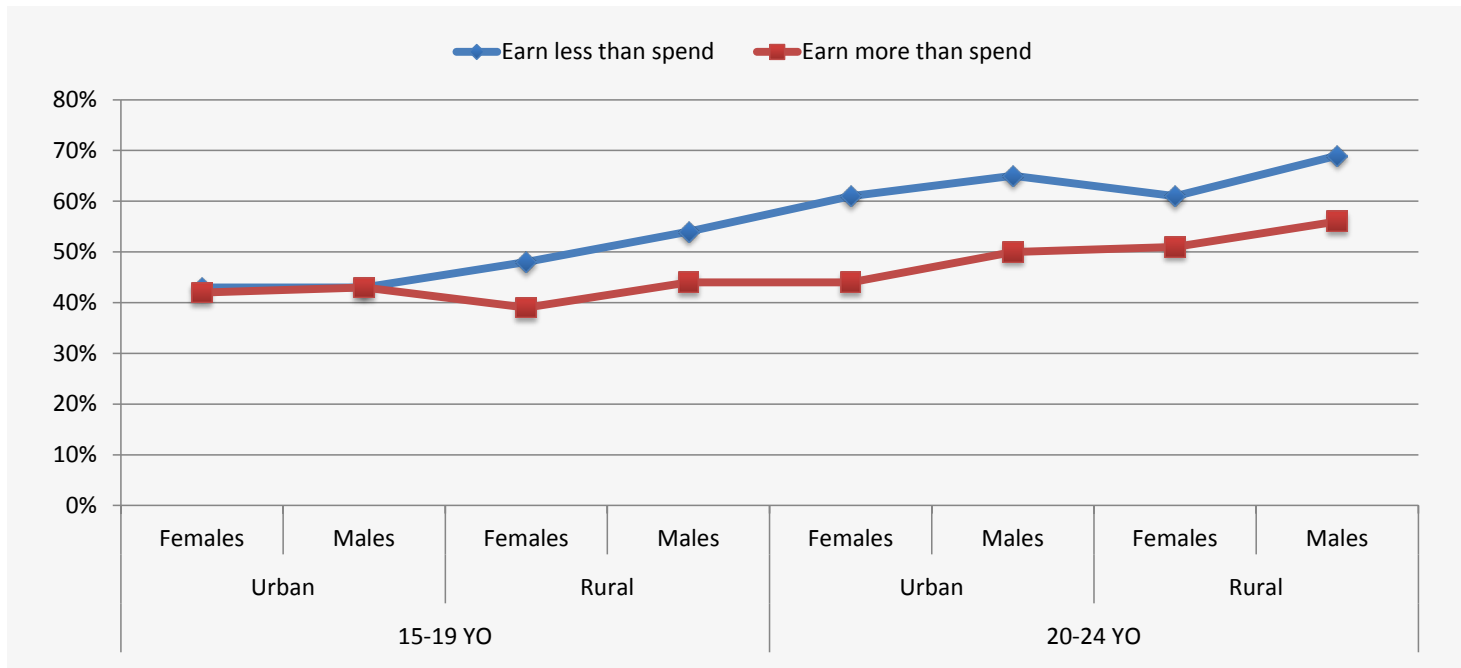
- A half of those with a hustle (54%) say this side job(s) allows them to be financially independent, another quarter (23%) say they expect financial independence in the nearest future.
- Even those with a side job(s) do not always make enough money to cover all of their expenses - about 3 in 5 (57%) of hustlas report a positive monthly balance.
- An average hustla reports a monthly income of TZSH 90,000 (\$41) and expenses of TZSH 100,000 (\$46), which is a better balance than for an average Tanzanian young person but still a negative one.

Half of males and a third of females get a side-job before they are 20 years old
hence most learn about financial activities early



- Saving, accumulating money is a central financial activity among young Tanzanians.
- On average, young people perform only 2 financial activities and those are either savings and budgeting or savings and P2P transfers.
- Tanzanian youth do not just receive money from other people - about quarter of those performing remittances send money to other people.

Have you ever saved/accumulated money?



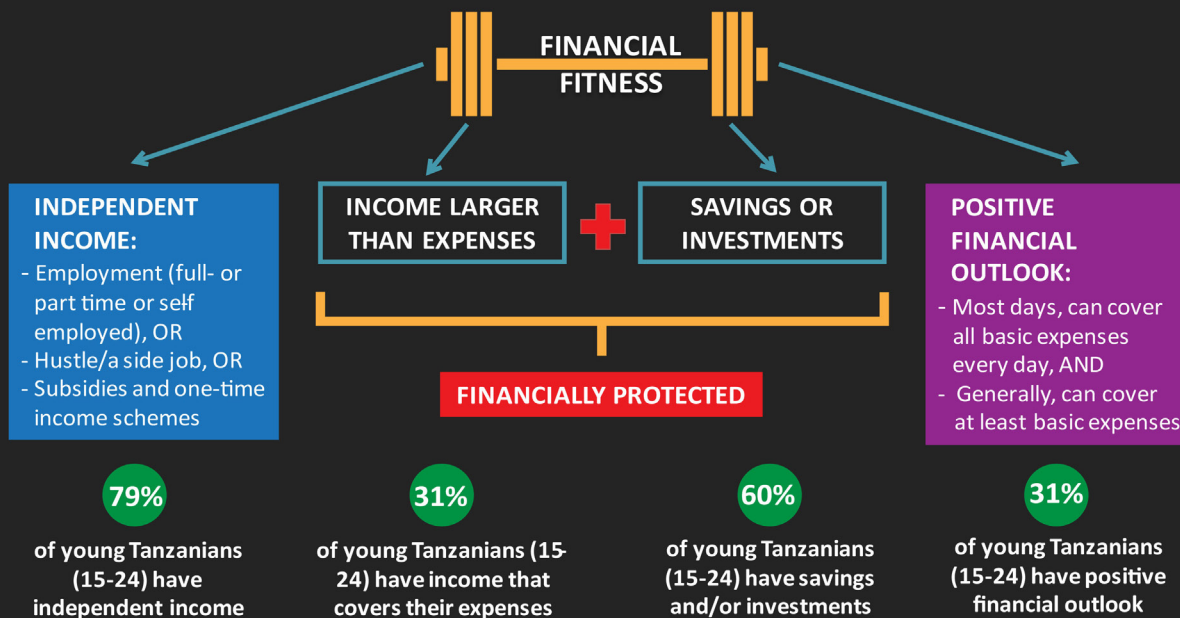
- 54% of young Tanzanians save money.
- Aside from urban adolescents, in all demographic segments young people are more likely to set aside/accumulate money if they are making LESS money than they need to cover their daily needs.

FINANCIAL FITNESS MODEL

All percentages are of the total youth (15-24 years old)

9%

of young Tanzanian (15-24) are financially fit, which is a combination of the 4 financial aspects below



- More than half of young Tanzanians live day-by-day, always on the look out for ways to earn quick money with small to no start-up investment. Shortage of money and the lack of secure earnings lead to savings and budgeting being most common financial activities/skills.
- Since job opportunities for girls are almost non-existent, parents do not invest in their education and girls settle on being housekeepers and occasionally picking up small jobs. Hence, most young females depend on men – first fathers, then boyfriends and husbands.
- Families play a central role in money matters – young Tanzanians seek advice from their parents on business opportunities, teaching on financial planning, start-up capital, and frequently upkeep money for themselves and families.

Agriculture

Can you describe in your own words what working in agriculture/food industry means?



AGRICULTURE

YOUTH'S STEREOPTYPES ARE AUGMENTED BY THE SHORTAGE OF KNOWLEDGE OF ALL DIFFERENT ASPECTS OF AGRICULTURE AND A VARIETY OF OPPORTUNITIES IN THE SECTOR

All percentages are of the total youth (15-24 years old)

Do you agree that this activity is part of agriculture?

% of "Strongly agree"



22%

Working in the laboratory to develop improved plants or animals

28%

Developing, selling technology to help farmers farm better

29%

Selling inputs to the farmers – e.g., seeds, fertilizers, animal feeds, vaccines

38%

Cultivating crops, animals to feed yourself and your family

34%

Cultivating crops, animals for business

28%

Processing agricultural products to add value to them/for buyers

38%

See AG as Production

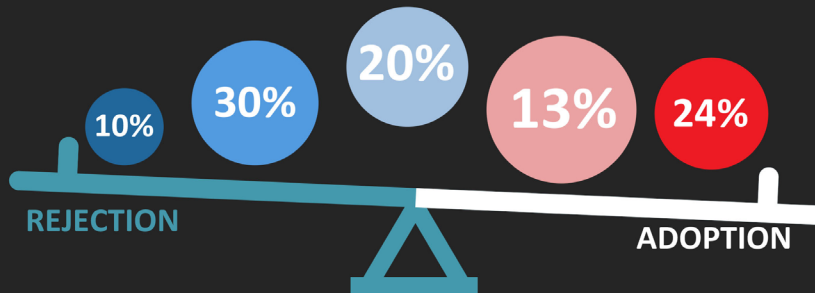
AGRICULTURE

WHAT IS YOUR CURRENT RELATIONSHIP WITH AGRICULTURE?

All percentages are of the total youth (15-24 years old)

3 IN 5 YOUNG PEOPLE REJECT AGRICULTURE.

- Agriculture means sacrificial living: working hard in a rural area where there are no opportunities to spend money on entertainment.
- The money is “hard” and “slow” – with harvest pay-offs only once or twice a year.
- As a side-job for an urban entrepreneur, agriculture means a lot of time spent checking on the rural workers, otherwise an urban farmer stands to have “lots of losses.”
- Agriculture is also likely to result in loss of “dignity” in the eyes of a peer group, including girls.



10%

I am not engaged in agriculture and will never be.

30%

I am not engaged in agriculture and will only be if everything else fails.

20%

I am engaged in agriculture but want to find another job.

13%

I am not engaged in agriculture but might try some ideas.

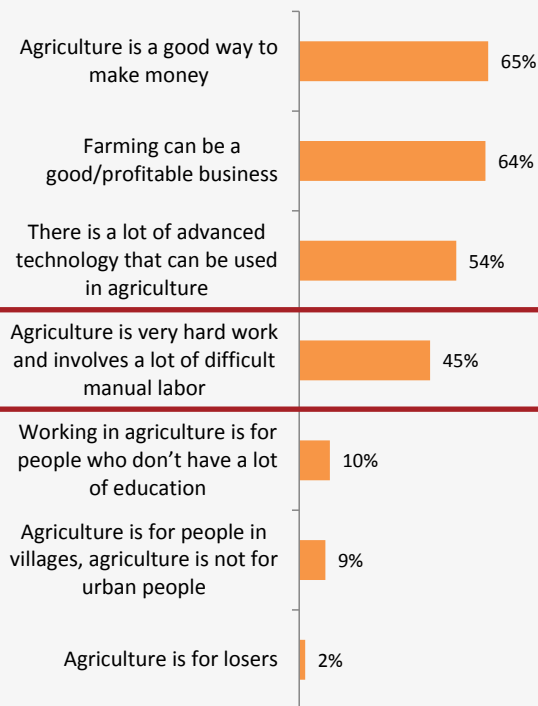
24%

I am engaged in agriculture and making money.

'Difficult Money' is not for urban, young and successful youth

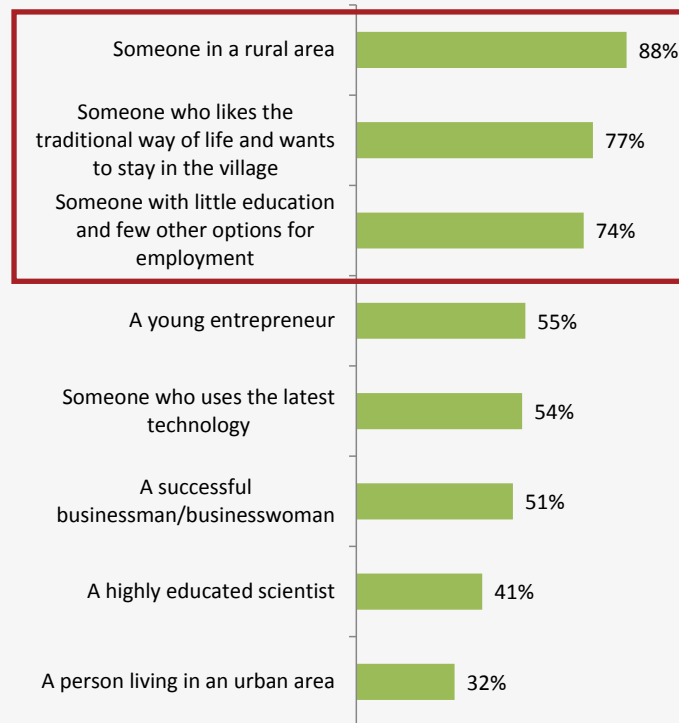
Do you agree with the following statements?

(% for "Strongly agree")



How likely is this person to be engaged in agriculture?

(% for "Very likely")



Youth's stereotypes are augmented by the shortage of knowledge of all different aspects of agriculture and a variety of opportunities in the sector

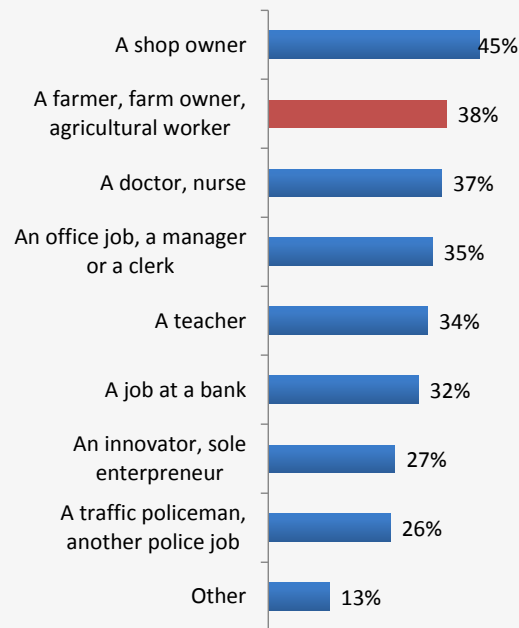
"I would date a guy if he was a fisherman or fish sales man on the ferry but not one who does petty retail fish business. His whole capital would only be 100000/= or maybe he'll make a small profit of 50000/= only. How could he date a girl who wants good things like a dress for 100000/= from Kinondoni? It wouldn't be a match!"

First it will degrade their [young men] status, like leaving the urban area to go do agriculture in the village while in town there are good jobs of sitting in the office. They won't go. And this is the reason why even the youth in the rural area leave their villages, knowing that here in the city there is good life other than agriculture. (Female Focus Group Discussion participant)

For us Zanzibarians when you tell us to go do agriculture it is like someone has insulted you and you can even take them to court... (Female Field Test participant)

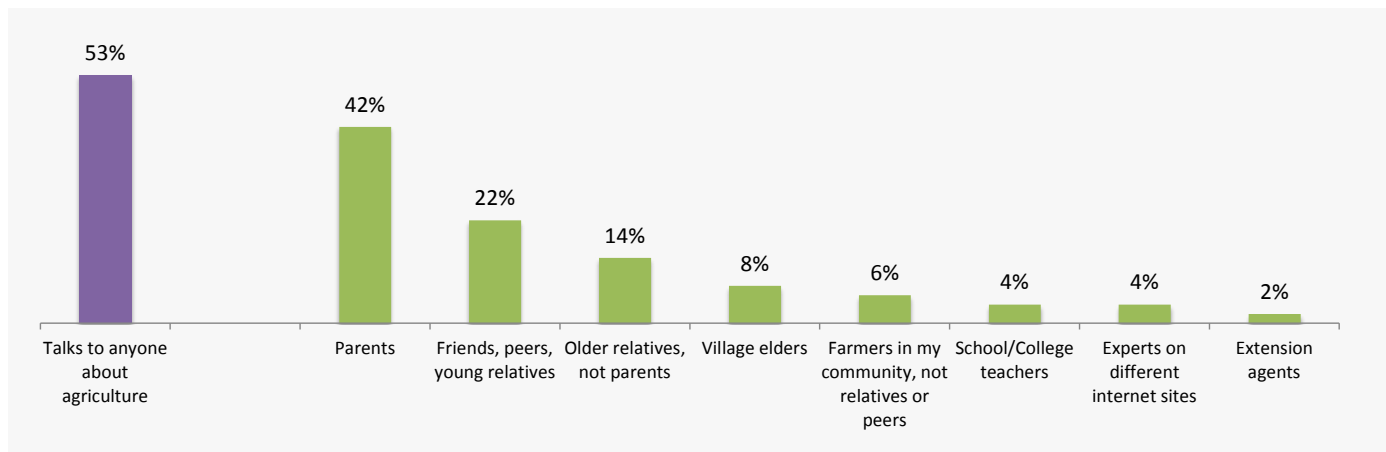
Some still choose ag' as a job because there are not many viable alternatives

If you could choose any job, what would be your top-three picks?

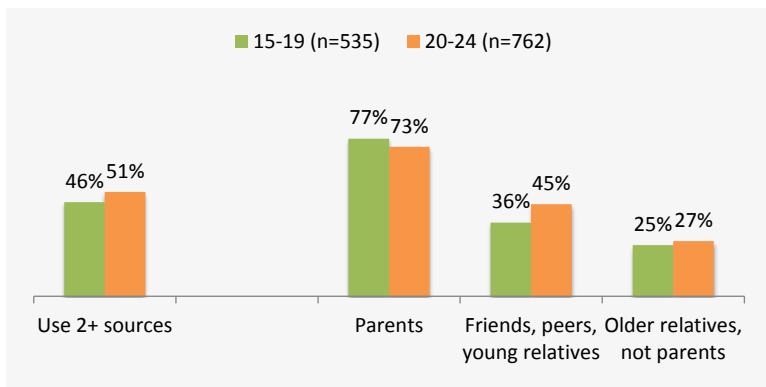
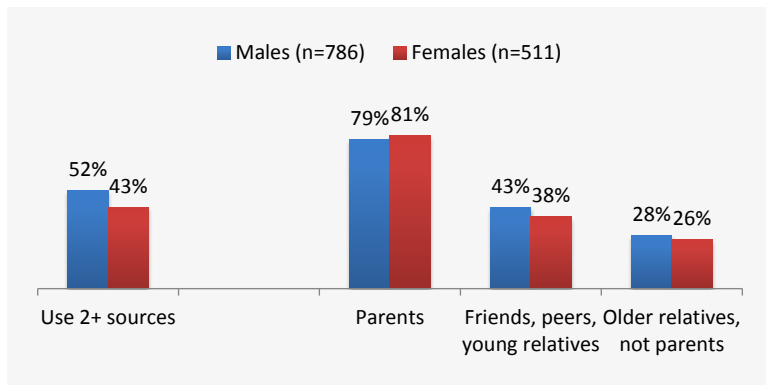


Parents Are a Living Proof of Ag' Stereotypes

Just over half of all young Tanzanians and 75% of those currently engaged in agriculture talk to other people about agricultural issues



- Parents are the most commonly mentioned source of information about agriculture ahead of even friends and peers. In fact, parents and older relatives – i.e., adults in one's household/family – are dominating the youths' world as a source of advice on agriculture.
- It is important to note that traditional "experts" – extension workers, current farmers, experts on the websites, etc. – are not very common resources for young people. Part of it is access – extension workers are scarce and internet access is still not common among young Tanzanians; when they do access the internet, they spend airtime on socialization, which is more valuable for the youth' culture.
- Another barrier to talking to "experts," especially current farmers in the community, is that many of them are doing very poorly and are in fact partially responsible for creating an image of agriculture as a poor career choice, which is all about hard work and little money.

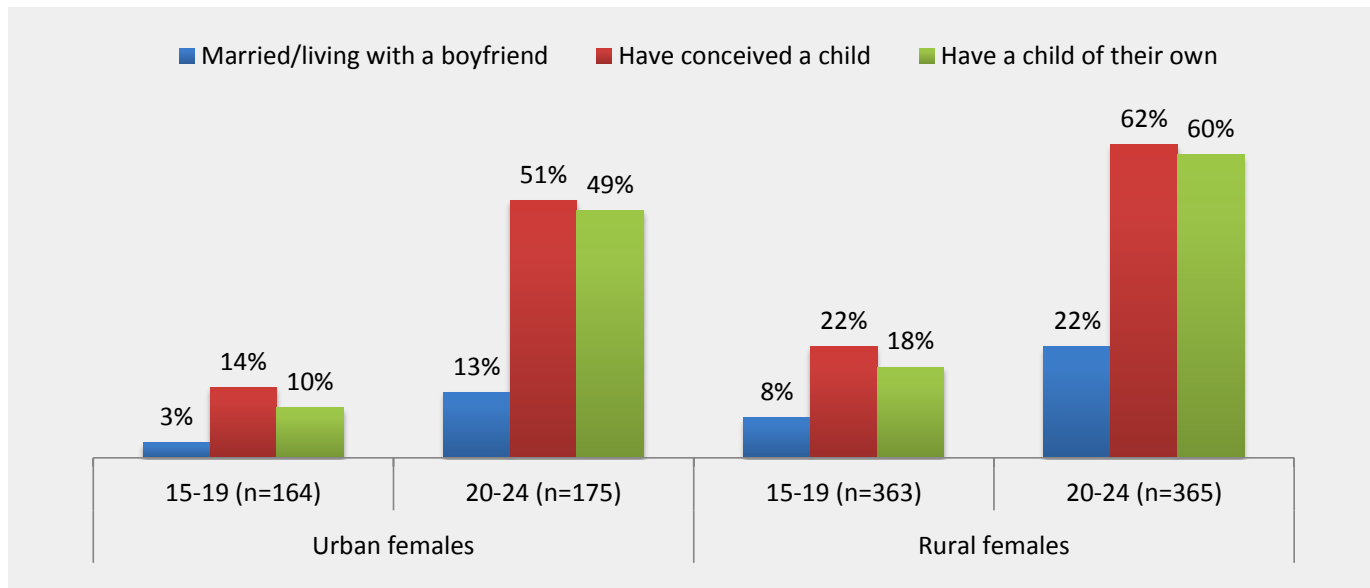


- Experience in agriculture, gender and age are the three (although weak) predictors of which and how many sources of information youth use to get advice on agriculture.
- Age-wise, older Tanzanians are more engaged in agriculture and conversations about it than adolescents.
- Parents in the case of more mature youth play a slightly smaller role and peers are slightly more important than for adolescents. This makes sense as some Tanzanians engage in agriculture WITH their peers and discussing their joint enterprise might be part of the peer-talk.
- Females overall are less likely to be engaged in agriculture and conversations about it, they are also less likely to use multiple sources than males.

- Young Tanzanians do not understand the agricultural value chain. All they see is the “production” part – hard labor with infrequent and unguaranteed earnings.
- Most of the information youth receive on agriculture comes from parents, who are not educated on the modern technologies and are not in the position to explain the potential for #EasyMoney in agriculture.
- Peers’ view of farmers as an “undignified” class and girls’ demand for “expensive” lifestyles put agriculture off the radar for most “respectable” young men.

Love, Life and Lifestyles

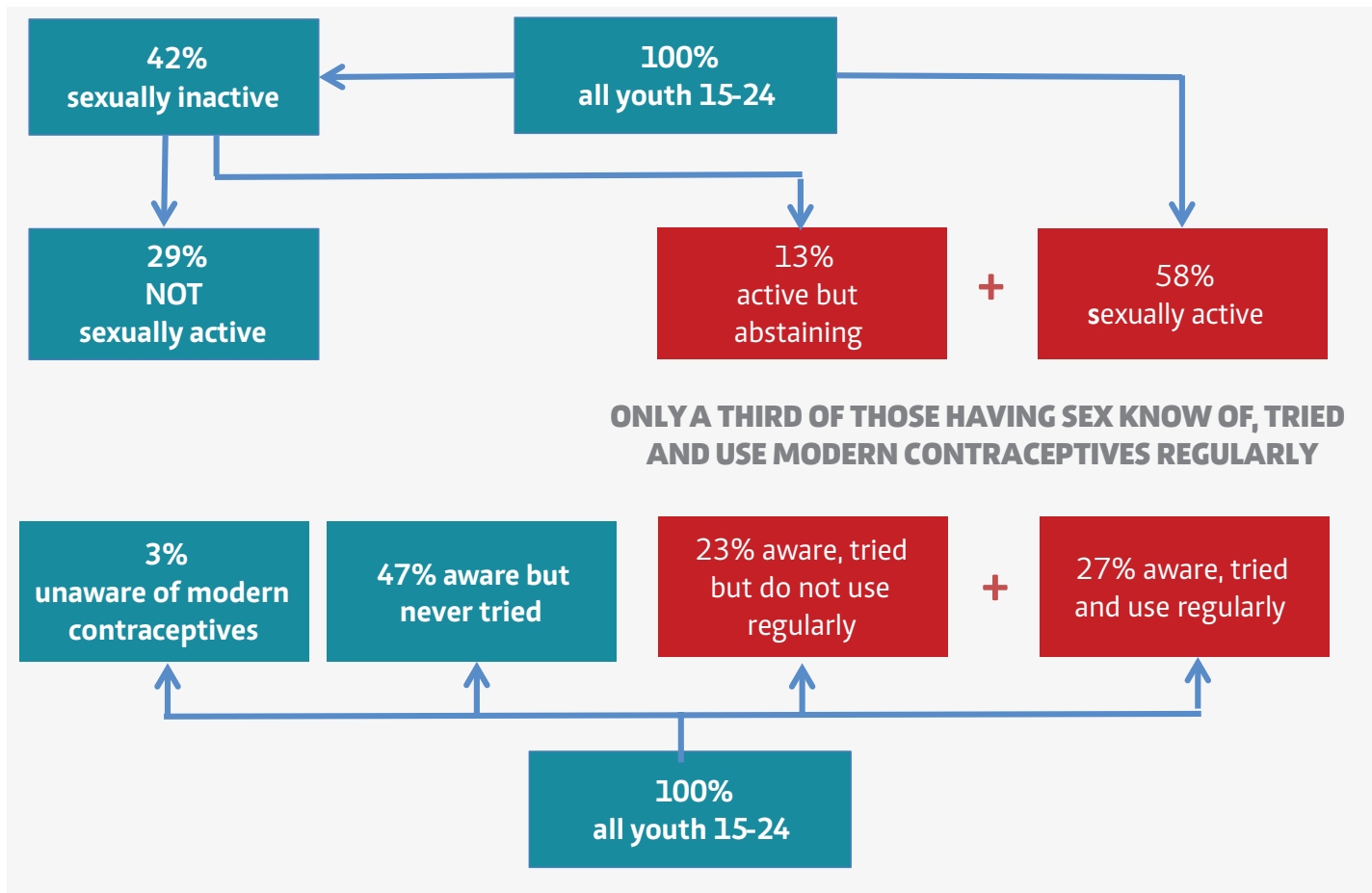
1 In 7 urban girls and 1 in 5 rural girls get pregnant in their teenage years

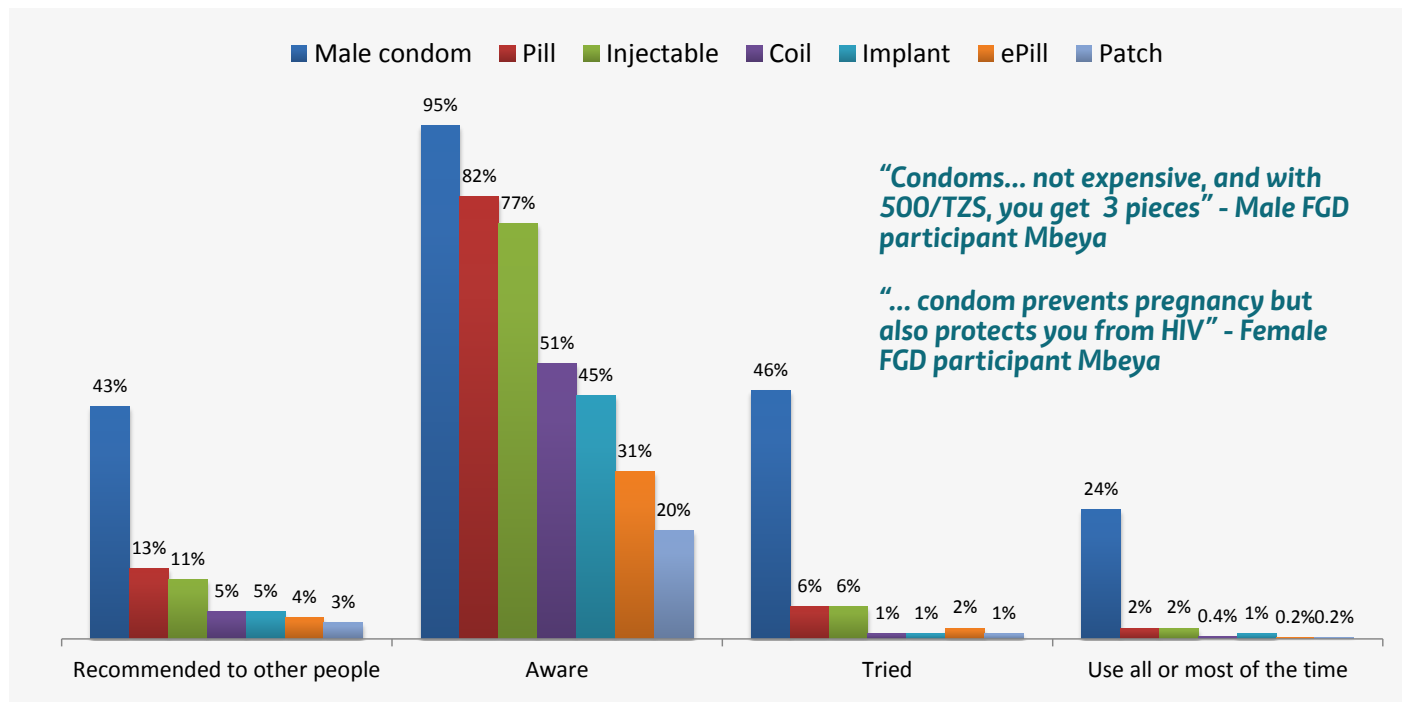


- By the age of 24, 3 in 5 Tanzanian females give birth. A third of young mothers have two or more children before they turn 25.
- Level of education is the key predictor of motherhood – the higher the education, the less likely a female is to conceive a child. In its turn, level of education depends on the place of residents, with rural more likely to drop out of school – some before completing form 4.
- According to the qualitative research, becoming a mother is an alternative to being engaged in farming or another type of “hard” work. Young mothers are provided for by their parents and/or fathers of their children and do not need to work unless they want to.

**Tanzanian youth consider relationships a serious matter.
Most see themselves as settled with one partner for life**

Self-identified segment	Description	% of youths (N=2,451)	% of men (n=1,386)
Settled and faithful	Respondents, who say they are married or settled with their loved one and never cheat	32%	29%
Single and searching	Respondents who are not in a relationships but they are dating	17%	17%
Little cheating never hurts	Respondents who say they have multiple partners, are unfaithful	11%	15%
Danger-aware	Respondents who say they are afraid of diseases (AIDS, HIV) and stick to one partner at a time	1%	1%
Saving it for the right time	Respondents who are virgins or abstinent because they want to first reach their goals in life	4%	4%
Life's complicated	Respondents in long-distance or secret relationships, other type of atypical partnerships	3%	2%
Secret keepers	Respondents who refused to answer the question	7%	7%
Unclear segment	Respondents whose relationships cannot be clearly defined	26%	26%





- While young Tanzanians have heard about modern contraceptives, they either do not understand how to use them or cannot afford them. Side-effects are also a concern.
- Male condom is the most common method of protection because it is affordable, serves a dual function, is easy to use and is not associated with side-effects.
- The lack of understanding, prevents young people from recommending contraceptives to their peers.

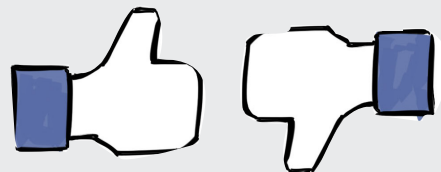
- Economy and the lack of knowledge guide young Tanzanians in their use of protection. Most opt to use male condoms, which are cheap, easy to use and play a dual function of protecting from pregnancies and diseases.
- Early and unplanned pregnancies are less of a concern for young Tanzanians than the shortage of money. In fact, by getting pregnant and settling with the baby's daddy, many girls remove themselves from the labor market, where opportunities are geared more towards men.

Shujaaz

As a Persuasive Media Brand



COMIC
500,000
monthly



**SOCIAL
MEDIA**
Over 120K+
fans



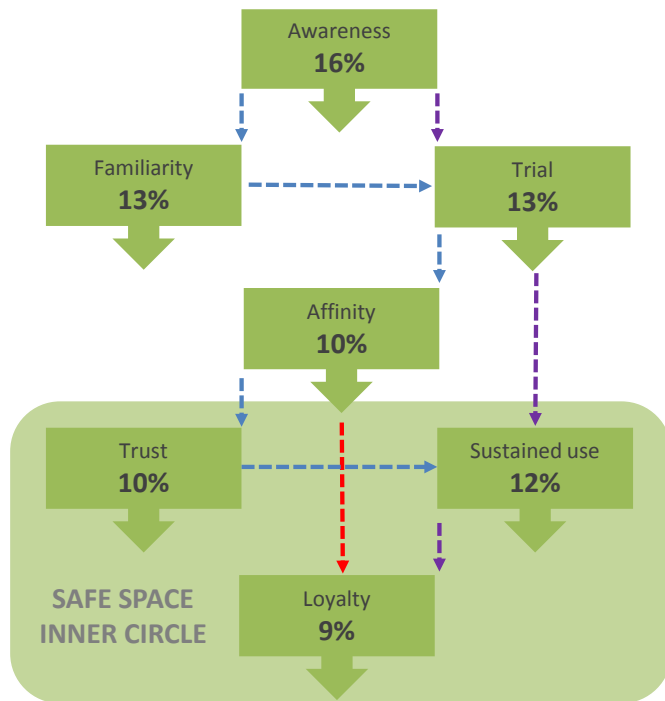
RADIO
Several
stations
country-wide
weekly



SMS
Network
80K+ Fans

SHUJAAZ IN DAR ES SALAAM

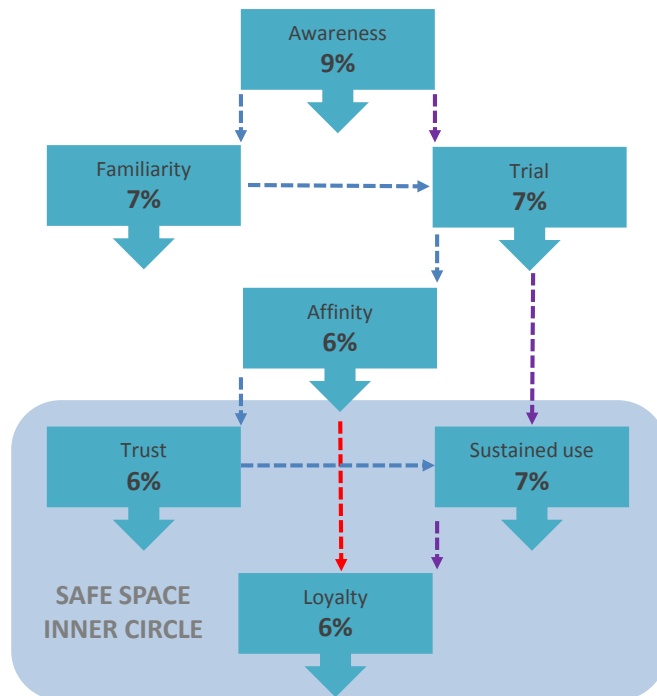
9 months after the roll-out



All percentages are of Dar es Salaam youth
(15-24 yo, n=276)

SHUJAAZ IN TANZANIA

1-6 months after the roll-out

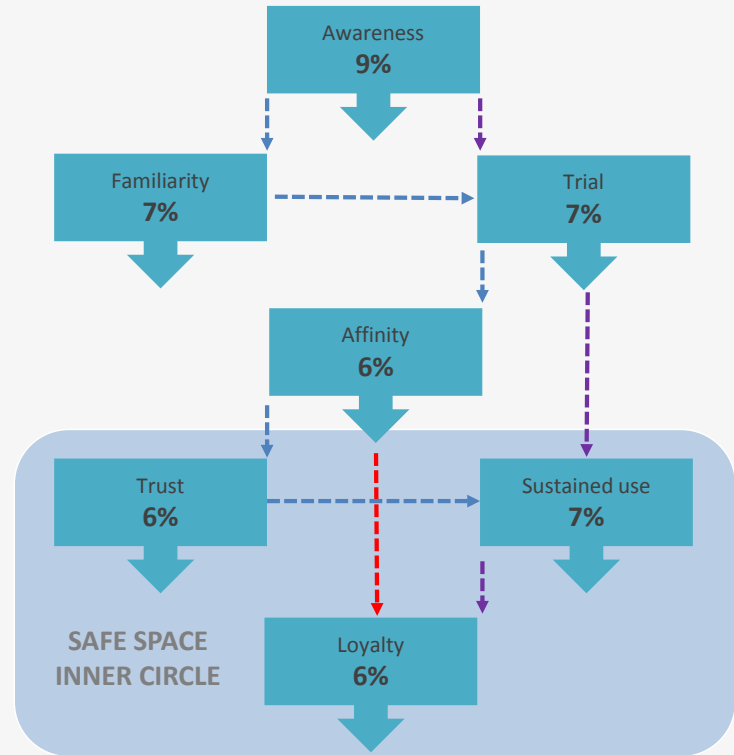


All percentages are of the total youth
(15-24 yo, N=2,451)

SHUJAAZ AS A PERSUASIVE MEDIA BRAND

HIGHLIGHTS:

- Just 6 months after the launch in Tanzania, **9%** of young Tanzanians or approximately **765,000** people are aware of Shujaaz.
- Shujaaz spontaneous awareness rate is already close to its competitor Fema: **9%** of all Tanzanian youths.
- Shujaaz is reaching about **600,000** Tanzanians between the age of 15 and 24.
- **4%** of young Tanzanians or about **300,000** already started implementing Shujaaz ideas in their own life.



All percentages are of the total Tanzanian youth (15-24 yo)

After just 6 months in Tanzania, we are making fast strides and building on experiences in Kenya

The two cross-sectional surveys 3 years apart show the rapid growth in engagement and reach among Kenya audience

Sagaci 2016

	Dar	TZ
Unprompted awareness of Shujaaz	6%	4%
Do you know of any character in the comic aside from DJ B?	12%	6%
Ever used any Shujaaz media	10%	7%
Shared anything you learned from Shujaaz with other people	5%	4%
Use any Shujaaz medium monthly	6%	2%
Ever applied any ideas from Shujaaz to their own life	4%	4%

TANZANIA

ACAR 2013

KE
17%
32%
40%
19%
8%
18%

R+ 2015-2016

KE
41%
49%
50%
32%
28%
32%

KENYA

What Would Shujaaaz Be If It Were... A Fruit?



- Sign of love
- Withstand all kind of weather, cold or hot does not rot so are people in SHUJAAZ they withstand all they pass through
- liked by people of all ages youth, children and even old people, and that's how SHUJAAZ is
- It's a fruit with high value and is related to love so is SHUJAAZ
- It's like a present that is entertaining to readers because in life the best fruit is an Apple
- it has benefits to the body so is shujaaaz it educates



Sweet and loved by many



It is a cheap and sweet fruit and so is SHUJAAZ and is can be read easily



Sweet, easy to get anywhere and used by all age groups



it touches the whole community just as lemons can be used in the porridge veggies, food and also as medicine



A banana has a lot of functions in the body including providing vitamins



A phone?

- **Smartphone:** because it has the capability of downloading a lot of things;
- **Sony:** It is a high quality phone and so is shujaaaz
- **Nokia:** because it is a brand that started a very long time ago, it has gone through a number of challenges but it still exists until now, and in shujaaaz there are people that have gone through a number of challenges in life but in the end have succeeded

Or Else?



A BLACK SUIT
It fits well in your body and when you go seeking for a job you easily get due to the appearance



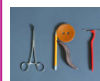
A HUMAN HEART
It (SHUJAAZ) has led to gaining of high confidence and educating on the life we are living



A DONKEY
It's an animal that can bear with any condition until it reaches its destination even when carrying heavy load and so is in SHUJAAZ people bear anything that comes there way



A ROSE
It is liked by people, it brings joy, happiness, peace and hope

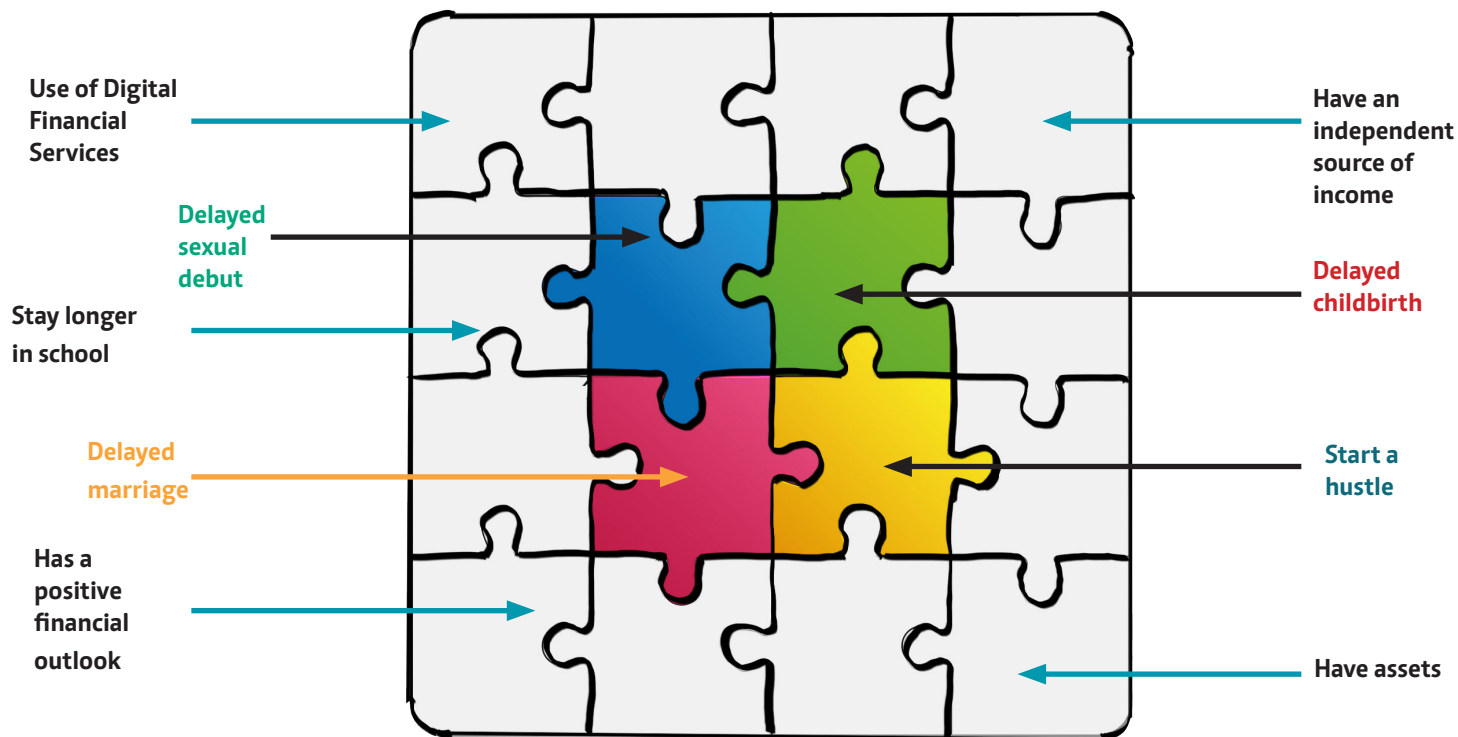


ART
Because it is a reflection of things we pass through that the characters seem to overcome



THE SUN SHUJAAZ
provides light to the community

We believe that attitudinal, normative and behavior change does not develop in just one aspect of a young person's life. Positive change is not an isolated occurrence but a systematic development of the wholesome personality. Some decisions, however, might be more significant for triggering the overall change.



AGRICULTURE

AGRICULTURE IS A STARTING POINT

All percentages are of the total youth (15-24 years old)

69% OF SHUJAAZ AUDIENCE OR 5% (425,000) OF TANZANIAN YOUTHS 15-24 REMEMBERED AT LEAST ONE AG STORY IN SHUJAAZ IN THE PAST 6 MONTHS

I am planning to start agriculture. Thanks for Shujaaz.

TABORA

Fish farming is a paying business. I am doing it and would urge other youth to do the same.

MTWARA

I failed in school and decided to grow chili peppers. I sell at least 5 sacks and plan to open a salon. DJ T is right – agriculture helps you make money.

SONGEA

I am planning to take over vegetable farming.

SUMBAWANGA

Top Agricultural Stories

**AG
Hustle**

**% of those
who read any
Story**

Honey seller

14%

Watermelon growing

14%

Chicken keeping

12%

Farming and fish breeding

12%

Strawberries

10%

Overview of Research Activities

JANUARY-APRIL 2016

F2F survey

- Conducted in January 2016
- A nationally representative survey with youths 15-24
- N=2,451
- Average length of an interview 56 min.
- Over 1,100 data points per respondent.
- Data collected on: basic demographics, access to and use of media, access to and use of mobile phones, access to and use of social networking sites, attitudes and behaviors related to reproductive health/tobacco/agriculture, financial status and employment, relationships with Shujaaz as a media brand

Qualitative study

- Conducted in March 2016.
- 8 Focus groups with 6 participants each.
- The goals of the study was to understand the “anatomy” of a conversation and interaction among young people: what topics they discuss, with whom, via which media, etc.
- The discussion was built around 3 scenarios played by hired actors and depicting situations from a real-life youth context. The study also used projective technics to extract deeper insights.

SMS survey (2)

- Conducted in February and April 2016.
- Both surveys aimed to get additional insights on the questions raised by either the national survey or qualitative studies or some of the hot topics picked out through the Risk Monitor.
- The surveys explored the issues of sex/ relationship, employment and agriculture.
- The surveys also explored the topics of money and savings and use of social media.

Digital Tracking

- Experimental analysis of digital data and data mining.
- Some of the examples include, setting and analyzing A/B experiments, content analysis, conversation pattern analysis, audience mapping by demographic characteristics, audience segmentation, establishing connections between audience behavior online and on-the-ground.

Risk Monitor

- Systematic tracking of formal (news and entertainment) media, advertisement and marketing campaigns, online and social media as well as informal conversations related to the key themes discussed by Shujaaz (reproductive health, agriculture, and youths lifestyle in general)
- Monthly evaluation of the effect the observed formal and informal activities might have on the beliefs, perceptions and behaviors of Shujaaz target audience.

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