Ipsos Marketing
The Market Understanding and Measurement Specialists

Handicrafts usage, perception and opportunity study

A research presentation prepared for the Belgian Development Agency by Ipsos Synovate Kenya

BTC BELGIAN DEVELOPMENT AGENCY

Study background

Research objectives

Findings

- Customer profile
- Purchase, and usage incidences and influences
- Customer preferences - attributes
- Spending habits/expense allocation
- Sources of information regarding handicrafts
- Points of purchase

Study background

- There is a lot of potential for high quality and uniquely designed fashion accessories and artifacts (kikoi, scarf's, dressing materials, pendants, earrings, Beads (Icicles, necklaces), bags -backpacks/computer bags- jewellery, carpets, door mats, tablemats, hammock, bedsheets, napkins, table cloths, candles, (from stone cutting), papier-mâché products, etc.) in both Kenya and Tanzania
- With the rise in demand for these products among the locals due to the growth of the middle class, special emphasis needs to be put to target this group
- The middle and the upper social economic class are people with disposable income. They like to shop and are specific on what they want thus it is important that this market is adequately addressed to realized the optimal income



Key objectives

The key objectives of this research are as follows:

- Establish the handicrafts customer profiles
- To determine trends and perceptions towards handicrafts in Kenya and Tanzania
- To uncover the consumption habits of the consumers
- To understand the attitudes, values, drivers and barriers to using handicrafts
- Knowledge, perceptions towards the Fair Trade concept
- To find out level of interaction with Fair-Trade items
- To establish communication and media consumption habits

Key information areas

- *Understand the current handicrafts customers by establishing;*
  - *General purchase behavior, attitudes and criteria*
  - *Purchase of fashion accessories - types*
  - *Purchase of home decorations - types*
  - *What they buy for themselves + what do they buy as a gift*
  - *Where do they purchase these items from?*
  - *What influences their purchase habits?*
  - *Why do they purchase these handicrafts?*
  - *Perceptions of local and international products*
  - *Do they have particular preferences?*
- *What do they like, what is trendy and what is not:*
- *product preferences*
- *Trendy / not trendy;*
- *Modern design;*
- *Materials used: for jewellery: locals pearls / gold only? Gold like?*
  - Is *kikoi / scarfs / … "in" or not / what is in*
  - *Are Backpacks in? which material? What about jeans? Vintage*
  - *What is in home decoration: do they buy / what do they buy*
  - *Preferred colours?*
  - *Values / attitude / drivers*
  - *What are positive influencing criteria when buying / choosing?*
  - *What would they be ready to pay more for? (ex. authentic; local, ethic; green, fair; healthy,…)*
  - *Ever heard of ethics? Fair trade? Green? Local? What does it mean? Valuable?*
  - *In how far have heard about ethics of Fair-trade? In how far do they feel concerned? If they buy, what and where and when?*
  - *What would be Advantages / disadvantages / constraints*
  - *How to sensitise / how to inform on fair-trade…*

Key information areas

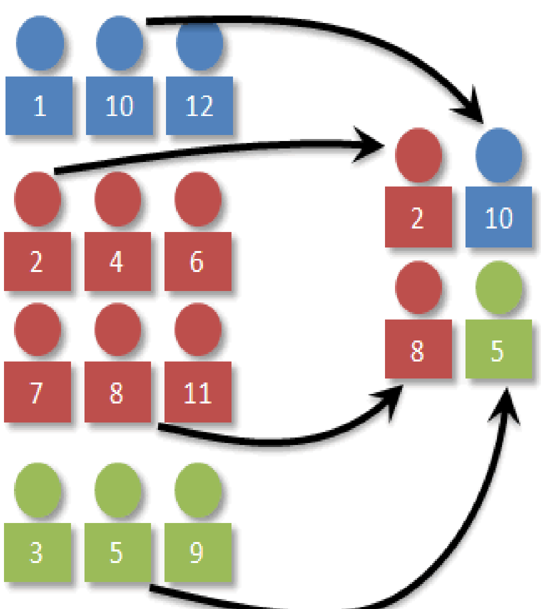
- *Knowledge on fair-trade*
- *Do they buy or not? Why?*
- *Where would they expect to buy them? What type of shops? Where would be most convenient?*
- *Advantages / disadvantages / constraints*
- *Knowledge and purchase is low. Why?*
- *What would they be ready to buy but does not exist for the moment?*
- *Ready to pay more? How much for a Kikoi / earrings / gab / computer bag / backpack*
- *How do they get information?*
- *Normally where do they shop from? And how often? What do they shop for?*
- *Where do they shop for their fashion accessories? What accessories are these?*
- *Where do they shop for home decoration/ house ware accessories? What accessories are these?*

Study approach - quantitative methodology

The study was done through face to face interviews with a semi-structured questionnaire at household level and key purchase points across three towns in the East African region

Set sample sample				
	Dar es Salaam	Arusha	Nairobi	Total
In-home interviews	100	100	100	300
Point of sale intercepts	180	140	180	500
Total Achieved Sample	280	240	280	800

We surpassed the set sample by **23** interviews reason being we had to replace non-users with user interviews - in summation we managed to speak to **797 users** which is still as statistically representative as a user target of **800**



Achieved sample				
	Dar es Salaam	Arusha	Nairobi	Total
In-home interviews	99	103	115	317
Point of sale intercepts	184	140	182	506
Total Achieved Sample	283	243	297	823

Summary of findings

Summary

- Customer profile
  - 57% of handicraft customers have completed post secondary education and are mostly aged between 25 to 34 years. 99% are currently employed with 59& in self employment and 40% in formal employment. In Kenya, majority earn between 50,000 KES to 100,000KEs while in Tanzania majority earn between 1 million to 2 million TSHS. There is a major split between SEC AB and C1 majority of whom are female.
- Non user profile
  - Of the total sample only 3% were non users, most of whom were male and aged between 25-34 years - mainly from the lower income bracket
- Usage and mind share
  - Awareness and usage of the different items in the handicrafts category is high especially for home decorations and fashion accessories. Majority of the respondents felt proud to be seen carrying/wearing/having locally made products. 39% claimed that they buy handicrafts more often than they used to in the past

Summary

- Consumption habits of the consumers
  - In the Household category, decoration items, doormats and carpets have a higher purchase incidence while the same applies to fashion jewellery and purses in the fashion accessory category.
  - Fashion jewellery and House decoration items have a higher demand compared to other items in the market; shawls and kikoi's follow closely in popularity
- Barriers & motivations to using of handicrafts among non users
  - Price and a perceived lack of uniqueness are the main barriers among non -users.
  - Main motivators to purchase among non users are competitive pricing, quality and uniqueness for both home decorations and fashion accessories
- Knowledge, perceptions towards the Fair Trade concept
  - On a total level, knowledge of fair trade is at 45% with an awareness level of 35% in Nairobi and 50% for Tanzania. The derived meaning of the term 'Fair Trade' is well attuned to the original meaning with 84% o the respondents stating that it refers to "Trading on favorable terms of business"
  - 62% of the respondents feel that the concept of Fair Trade will provide a platform for better quality items, while 55% feel that the items will be more affordable. On the contrary, some of the disadvantages regarding Fair Trade are increased price and imitations in the market
  - 43% of the respondents claimed that they had ever purchased a Fair Trade item

Summary

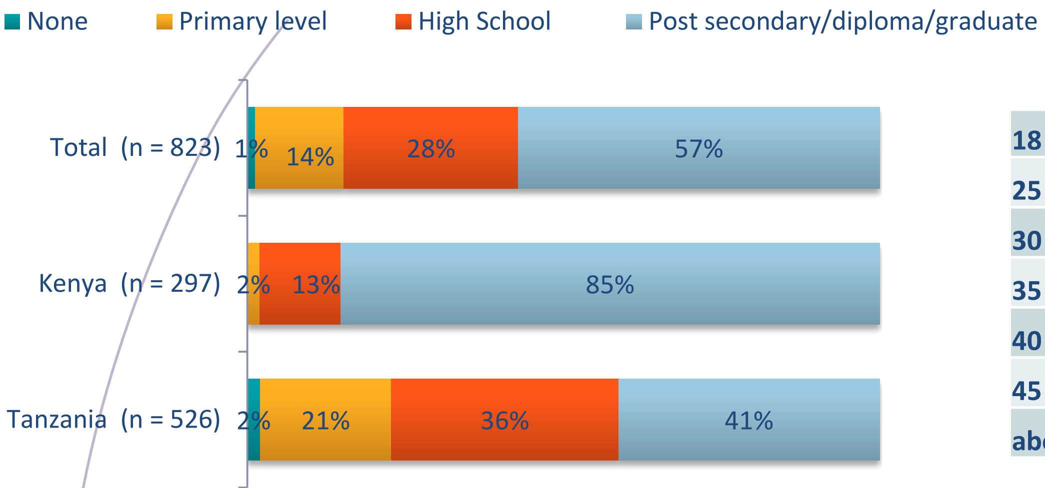
- Communication and media consumption habits
  - On a wider scope, Television, Friends & Relatives as well as the Radio are the leading sources of information regarding handicrafts
  - Consumers in Nairobi look more to the Internet, friends and relatives when looking for information regarding handicrafts, while consumers in Tanzania refer mostly to the television for information regarding handicrafts.

Respondent profiles

Research findings

Respondent profile 1/3

Education



Age

	Total (n =823)	Nairobi (n =297)	Arusha (n =243)	Dar es Salaam (n =283)
18 – 24 years	21%	15%	31%	17%
25 – 29 years	33%	34%	25%	39%
30 – 34 years	24%	28%	23%	22%
35 – 39 years	10%	11%	9%	10%
40 – 44 years	5%	4%	5%	6%
45 – 50 years	4%	3%	5%	4%
above 50 years	3%	4%	3%	2%

Majority of shoppers fall between the ages of 25 and 34 across most of the towns, Arusha registered more younger shoppers compared to other towns. Kenya has a relatively higher ratio of people who have post secondary education. 54% of the respondents is Nairobi are in formal employment as opposed to those in Arusha and Dar Es Salaam who are mostly self employed

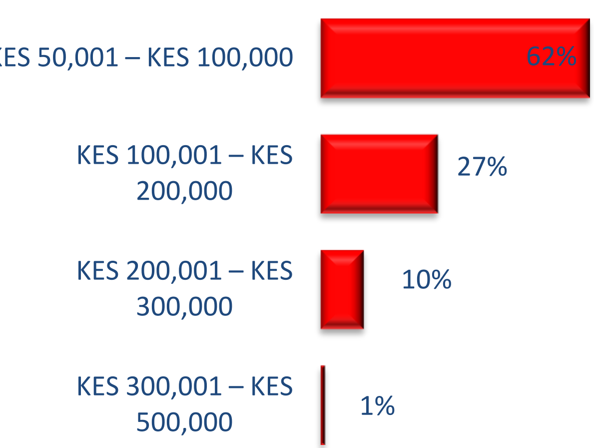
Occupation

		Region			Age in years							Gender	
	Total (n = 823)	Nairobi (n = 297)	Arusha (n = 243)	Dar es Salaam (n = 283)	18 – 24 (n = 170)	25 – 29 (n = 273)	30 – 34 (n = 200)	35 – 39 (n = 83)	40 – 44 (n = 40)	45 – 50 (n = 32)	50+ (n = 25)	Male (n = 386)	Female (n = 437)
Self employed	59%	43%	67%	69%	57%	55%	59%	69%	65%	66%	68%	60%	58%
Employed	40%	54%	33%	31%	43%	45%	41%	31%	33%	31%	16%	39%	41%
Retired	1%	2%	0%	0%	0%	0%	0%	0%	3%	3%	16%	1%	1%

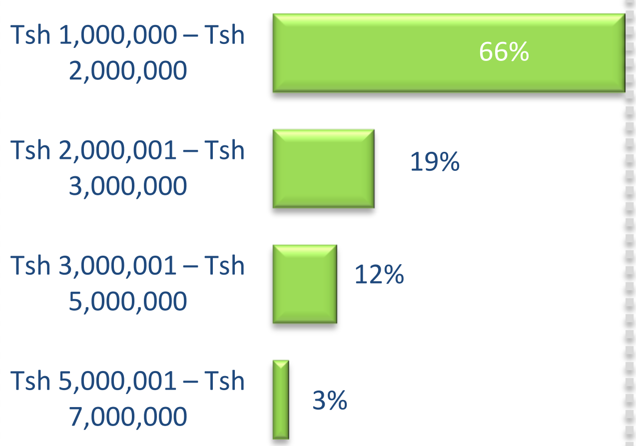
Respondent profile 2/3

Gross Monthly Personal Income

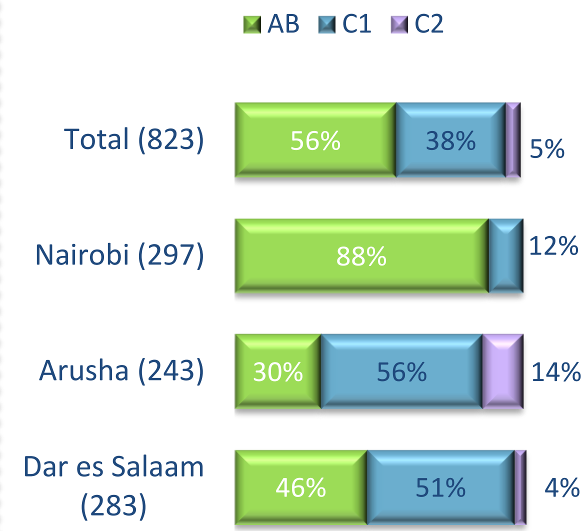
Kenya



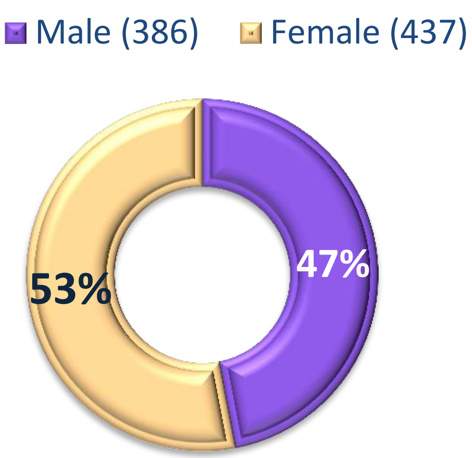
Tanzania



Social Economic Class



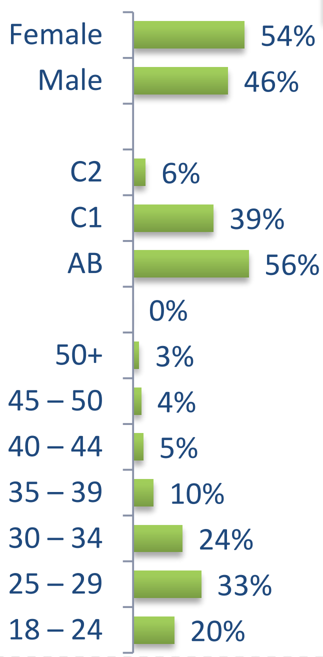
Gender

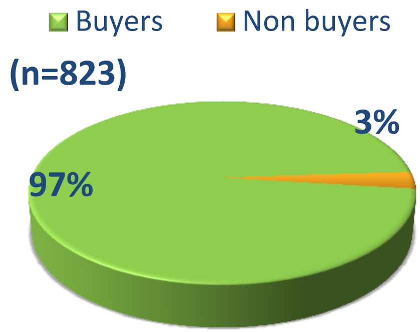


- The income trends coincide with the funnel representation of income distribution in Kenya and Tanzania (i.e. a majority are middle to lower income earners while approximately 2% fall in the highest income bracket.
- A greater number of the respondents fall into the SEC AB, C1 with highest number of Abs being found in Nairobi while the converse relates to Arusha having a higher number of C2s - this can also be related to a higher number of younger respondents coming form Arusha
- The gender split was slightly skewed to the female with a 53:47 percentage split

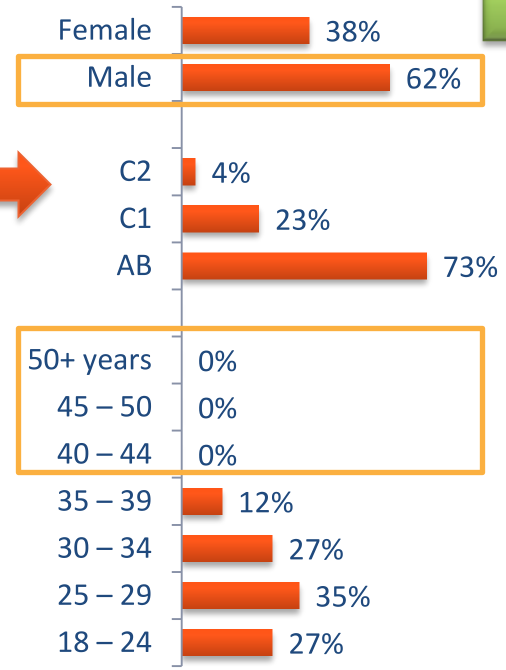
Handicraft buyers vs. non buyer profiles

N=797





N= 26*



****Small non-user sample - translate with caution**

Tanzania income splits	User (518)	Non User (8)
Tsh 1,000,000 – Tsh 2,000,000	66%	63%
Tsh 2,000,001 – Tsh 3,000,000	19%	25%
Tsh 3,000,001 – Tsh 5,000,000	12%	13%
Tsh 5,000,001 – Tsh 7,000,000	3%	0%

Kenya income splits	User (279)	Non User (18)
KES 50,001 – KES 100,000	61%	67%
KES 100,001 – KES 200,000	27%	17%
KES 200,001 – KES 300,000	10%	17%
KES 300,001 – KES 500,000	1%	0%

Non users are generally from the lower income groups and fall under the younger age brackets. The non user group is also a predominantly male category

Research findings

Awareness of home decorations and fashion accessories

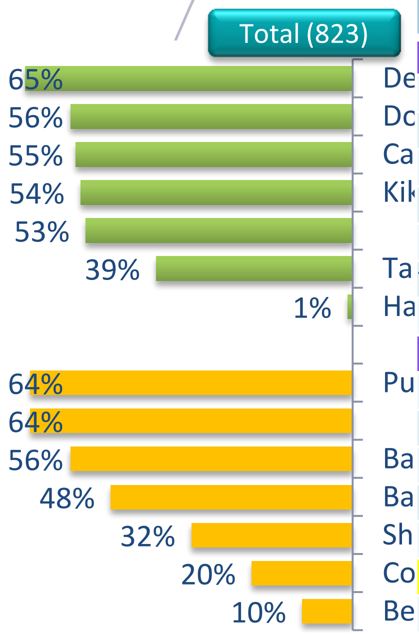
Fairly high awareness levels across all towns for most items in the handicrafts category Lower awareness for Hammocks and Beachwear in Nairobi probably attributed to distance from the coastal frontier.

	Total (823)	Nairobi (297)	Arusha (243)	Dar es Salaam (283)	Male (386)	Female (437)
Home decorations						
Decoration items	84%	62%	100%	94%	84%	84%
Doormats	79%	43%	99%	99%	78%	79%
Kikoi	78%	55%	97%	86%	74%	82%
Carpets	76%	40%	100%	93%	76%	76%
Tablemats or Placemats	74%	40%	98%	88%	72%	75%
Utensils made of wood/ other materials	74%	33%	99%	96%	74%	74%
Hammocks	46%	5%	70%	69%	49%	43%
Fashion accessories						
Fashion jewellery (NOT made of charms or precious metals)	86%	87%	84%	86%	84%	87%
Purses	79%	47%	98%	97%	72%	86%
Bags	77%	48%	99%	88%	77%	77%
Back packs	69%	30%	99%	85%	73%	66%
Shawls or scarfs	67%	42%	92%	72%	68%	67%
Computer bags	64%	25%	90%	83%	67%	62%
Beachwear	53%	14%	81%	70%	56%	51%

Column percentages

Purchase incidences

Highest purchase for household decorative items , purses and fashion jewellery. Purchase of computer bag is not very high among the target respondents. However almost half of the respondents purchase back packs - most of whom are in Arusha and Dar Es Salaam.



	Nairobi (297)	Arusha (243)	Dar es Salaam (283)	Male (386)	Female (437)	AB (464)	C1 (314)	C2 (45)
Household decorations								
Decoration items	45%	79%	75%	61%	69%	58%	74%	78%
Doormats	24%	63%	84%	53%	59%	50%	64%	64%
Carpets	25%	74%	70%	55%	55%	49%	61%	67%
Kikoi	33%	75%	58%	42%	65%	46%	67%	53%
Utensils made of wood/ other materials	17%	68%	77%	49%	56%	43%	63%	84%
Tablemats or Placemats	21%	56%	43%	33%	43%	36%	41%	51%
Hammocks	1%	0%	4%	2%	1%	1%	2%	2%
Fashion Accessories								
Purses	30%	84%	83%	54%	73%	54%	76%	84%
Fashion jewellery	75%	54%	61%	58%	69%	71%	56%	49%
Bags	37%	62%	71%	59%	54%	53%	60%	62%
Back packs	21%	65%	61%	54%	42%	44%	49%	73%
Shawls or scarfs	25%	40%	34%	29%	35%	31%	34%	36%
Computer bags	13%	14%	31%	24%	16%	27%	10%	7%
Beachwear	3%	7%	20%	11%	9%	12%	9%	2%

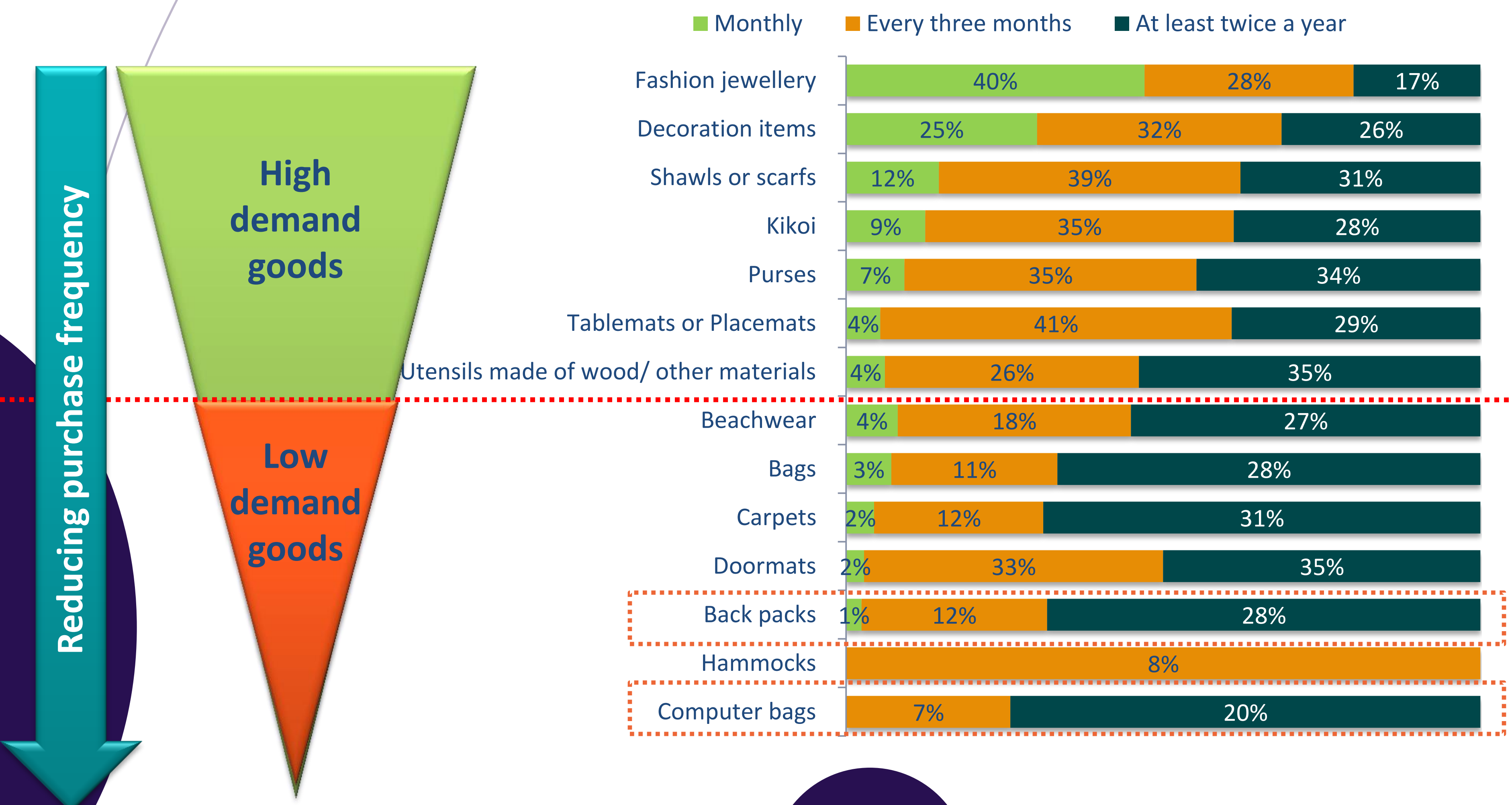
Most often purchase

Incidence of buying house decoration items is highest in Arusha town - the main household decorations bought include wall hangings and carvings

		Region			Gender				
	Total (823)	Nairobi (297)	Arusha (243)	Dar es Salaam (283)	Male (386)	Female (437)	AB (464)	C1 (314)	C2 (45)
House decoration items	20%	18%	25%	18%	20%	20%	19%	21%	24%
Utensils made of wood/ other materials	9%	2%	13%	13%	8%	10%	6%	11%	27%
Kikoi	8%	6%	12%	5%	6%	9%	5%	11%	9%
Doormats	5%	2%	5%	10%	6%	5%	4%	7%	7%
Carpets	4%	1%	6%	6%	5%	4%	4%	5%	2%
Tablemats or Placemats	3%	2%	5%	2%	1%	4%	2%	4%	2%
Fashion jewellery	26%	42%	14%	18%	22%	29%	33%	17%	11%
Purses	9%	6%	11%	8%	8%	9%	9%	9%	4%
Back packs	4%	1%	4%	6%	6%	1%	2%	5%	4%
Bags	3%	6%	0%	1%	5%	1%	4%	1%	2%
Shawls or scarfs	3%	2%	2%	3%	4%	2%	2%	4%	2%
Computer bags	0%	0%	0%	0%	0%	0%	0%	0%	0%
Beachwear	0%	0%	0%	0%	1%	0%	0%	0%	0%

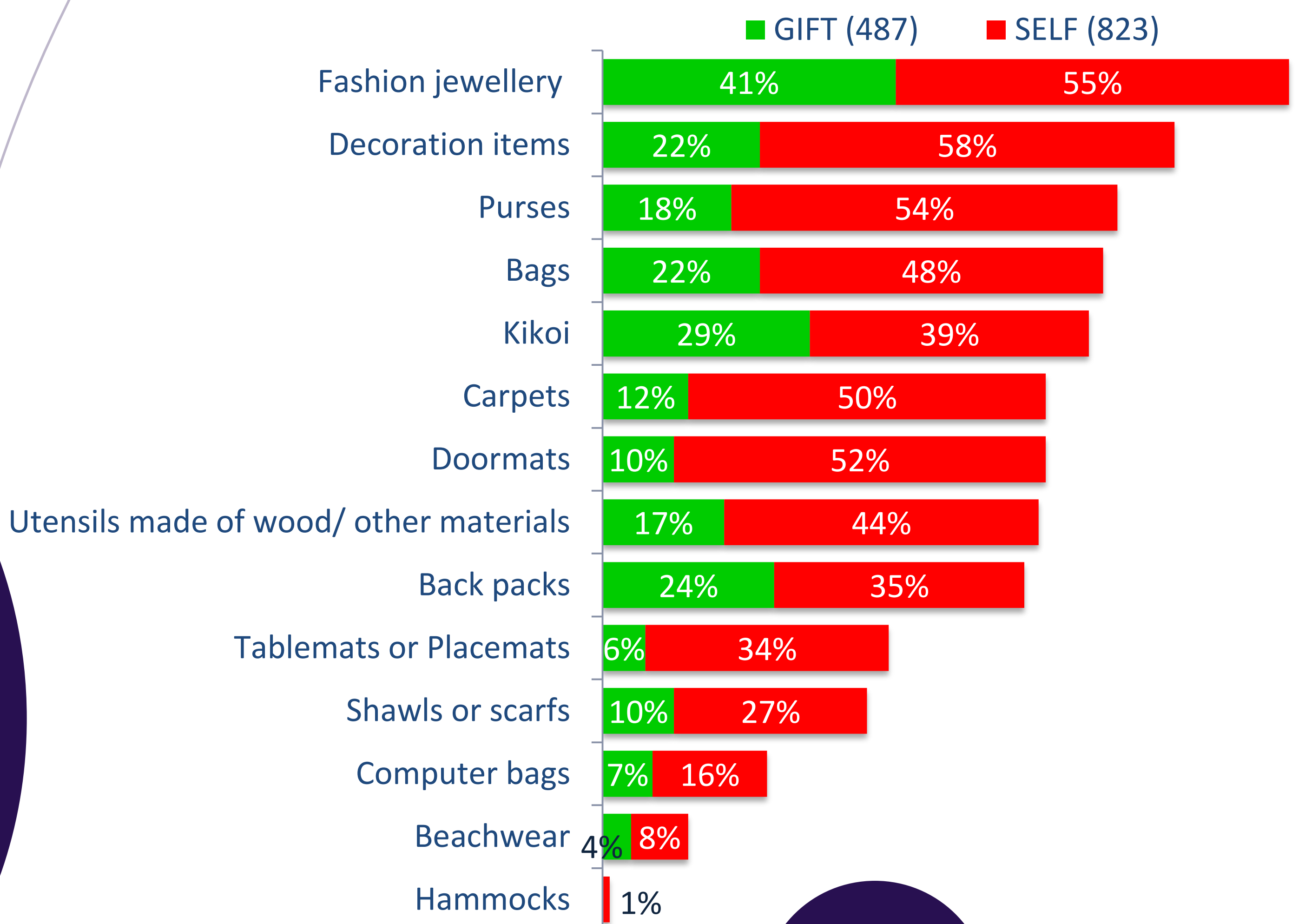
Purchase frequency

Lower purchase frequency registered for computer bags relative to back packs. Highest purchase frequency recorded for Fashion jewellery, and house decoration items. Computer bags are likely to be bought once a year, while carpets are rarely bought with most respondents claiming that they buy them once in every two to three years



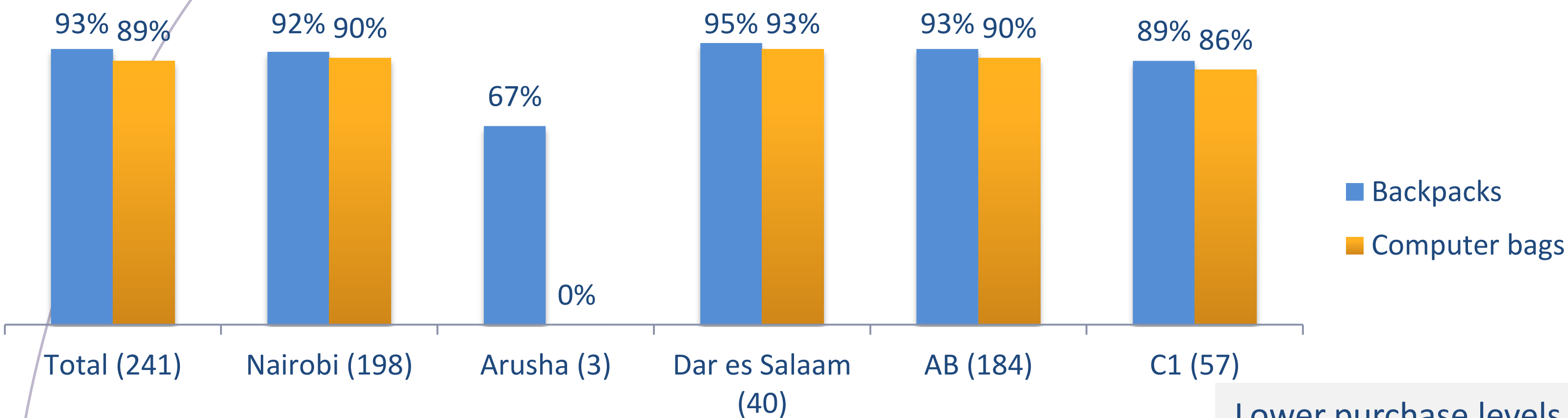
Items bought for self vs. gifts

59% of the respondents mentioned that they have bought gifts for people other than themselves, Fashion jewellery, Kikois and Back Packs top the gifts list. Note the low percentage of 'gifting computer bags'



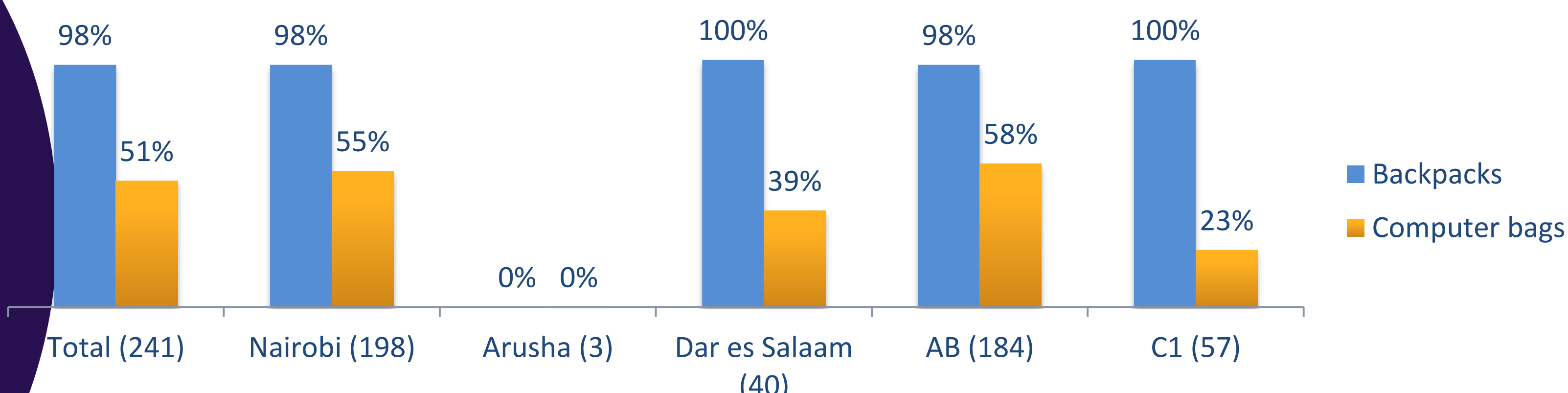
Awareness and purchase of computer bags and backpacks

Awareness



Lower purchase levels registered for computer bags relative to back packs. Arusha shows minimal interaction with handicrafts

Ever purchased



Asked to those who are not aware of computerbags/backpacks

Reasons for non purchase of home decorations and motivators to buy among non users

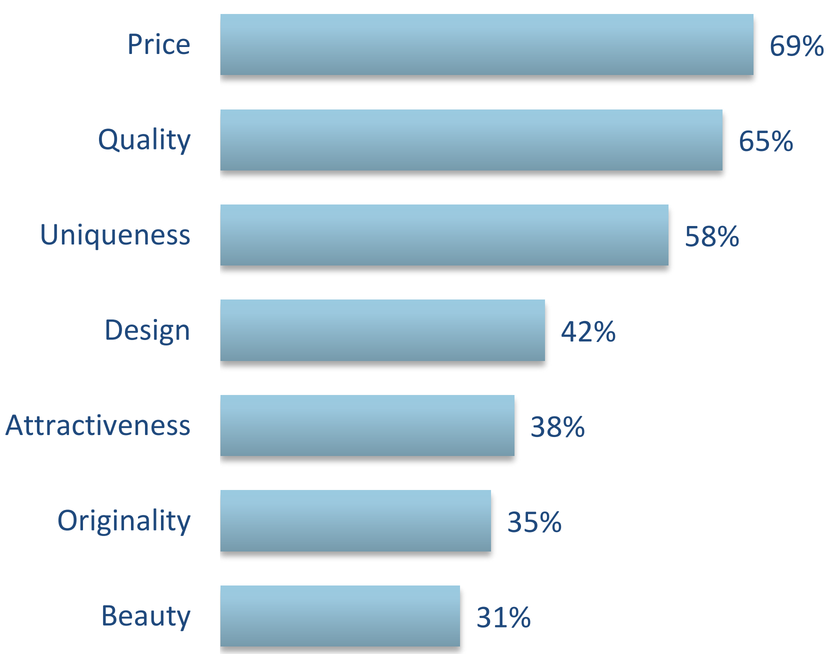
Reasons for non purchase	Total (26*)	Male (16*)	Female (10*)
Home decorations and fashion accessories are expensive	42%	44%	40%
No unique items	31%	38%	20%
Items are not readily available	12%	19%	0%
They are not beautiful	12%	6%	20%

Price and lack of uniqueness are the main barriers among non - users.

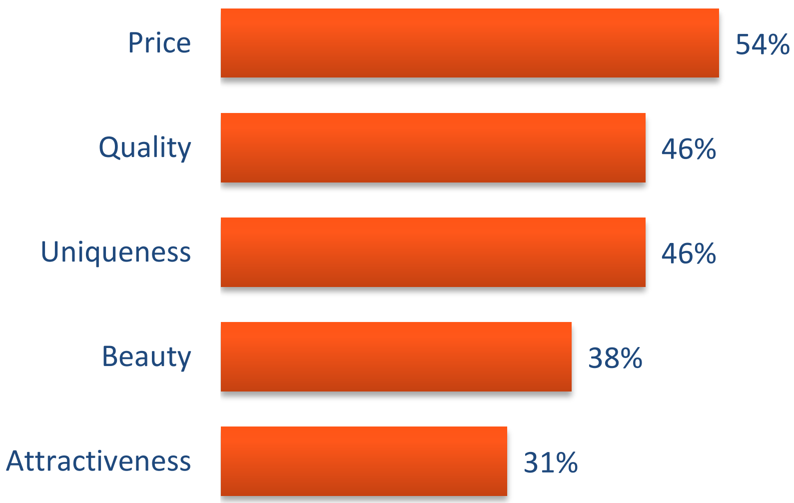
Main motivators to purchase are price, quality and uniqueness both for home decorations and fashion accessories

N=26

Factors that would make them buy home decoration/ home ware



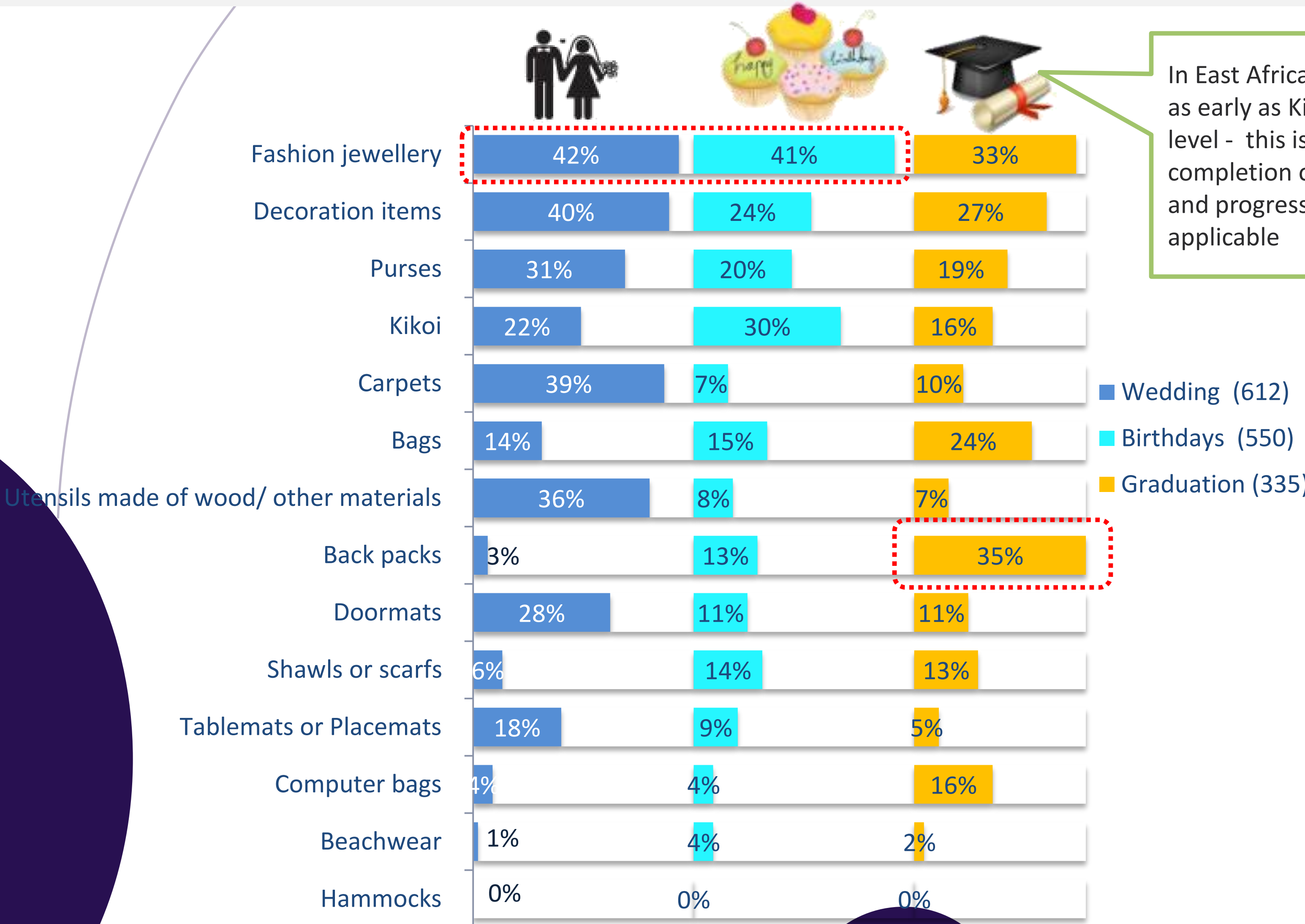
Factors that would make them buy fashion accessories



** Small sample

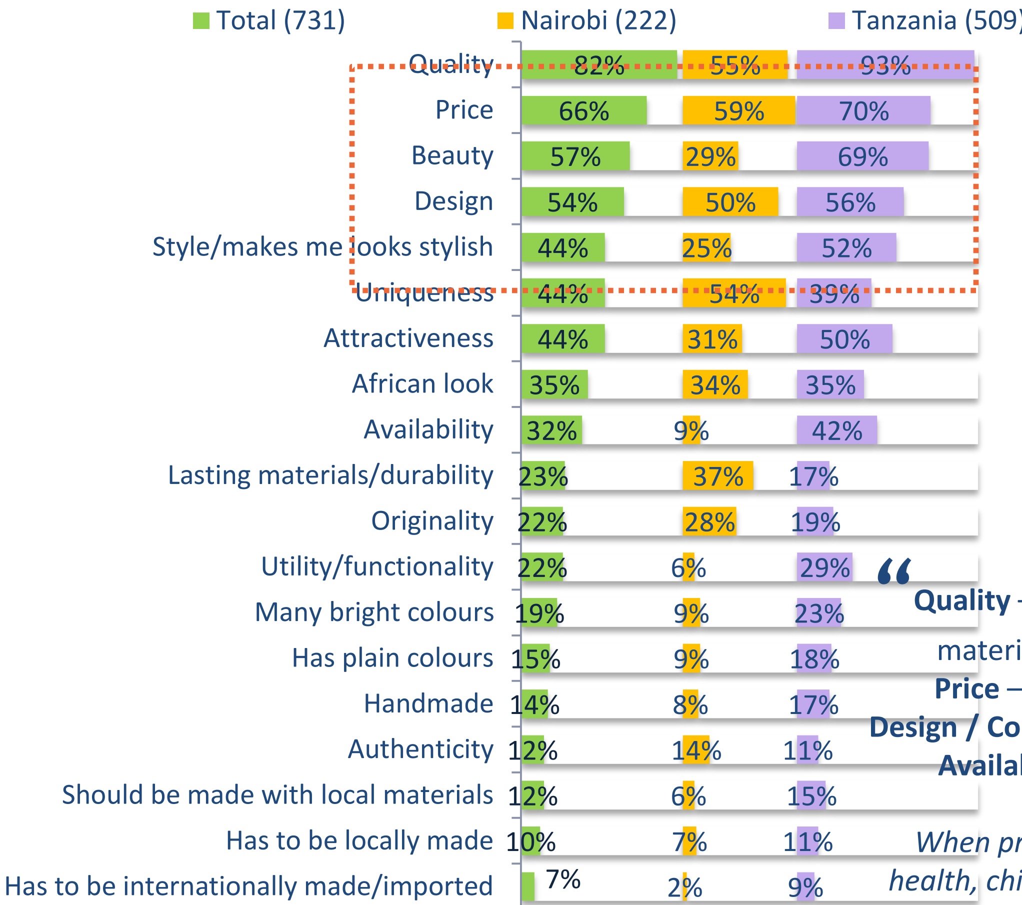
Items bought during special occasions

Fashion **jewellery** are the most gifted items, back packs are especially bought for graduation ceremonies - this indicates their appropriateness for school going individuals



In East Africa, students graduate from as early as Kindergarten to University level - this is therefore equivalent to completion of one educational level and progression to another where applicable

Consideration factors when purchasing home decorations



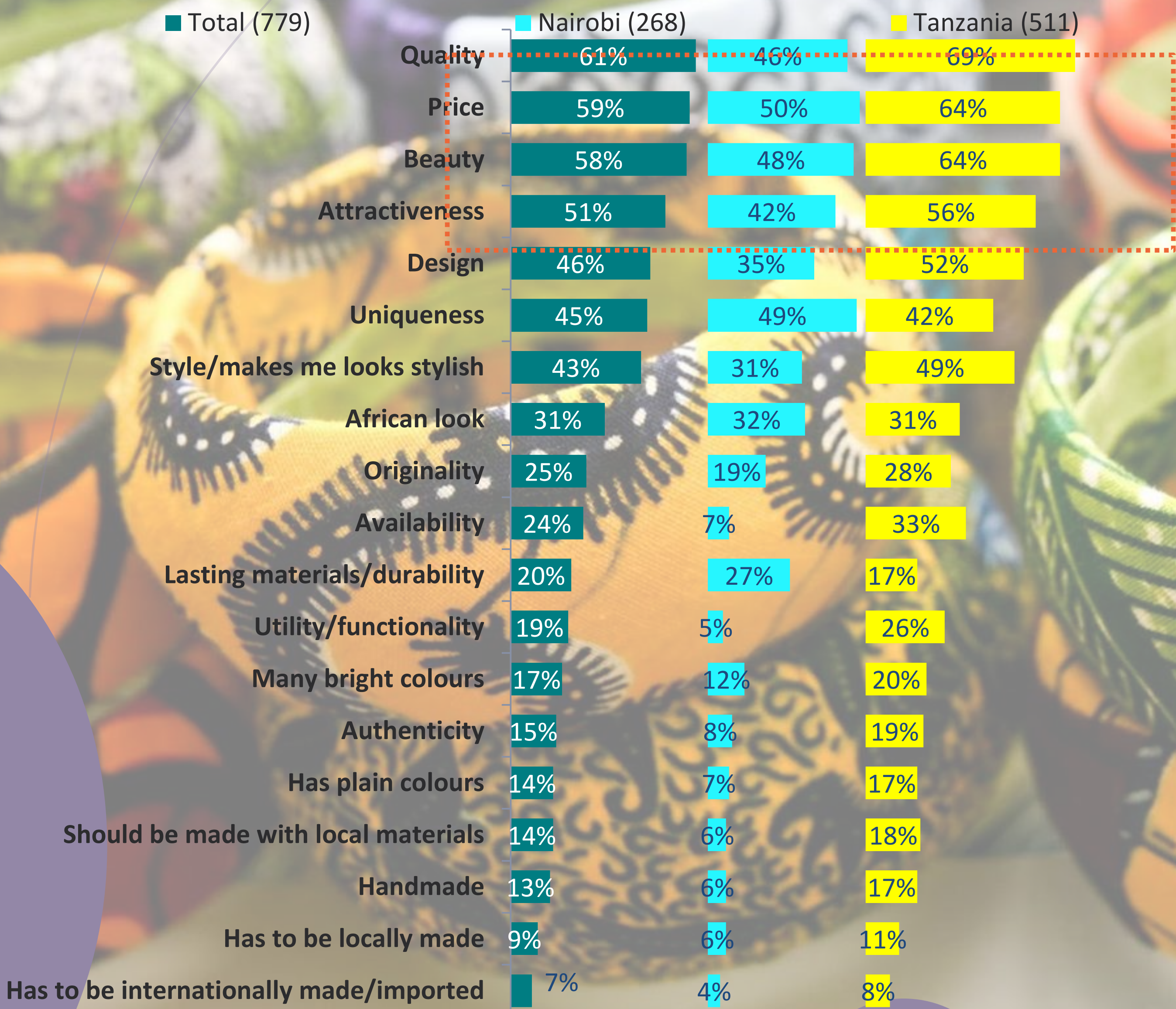
Quality, Price, Beauty and design are the top consideration factors when buying home decorations

“ **Quality** – the item has to be of high quality, this means long lasting material, good texture, item will not wear off easily, genuine
Price – how affordable the item is depending on ones pocket
Design / Color – it has to be stylish, bright full and attractive to the eye
Availability – the item should readily available in the market

When prompted about external issues like environmental issues, health, child labor etc – most respondent stated as much as they are important they never keep such matters in mind when purchasing the item, as long as the item is of good quality and attractive those are the key driving factors for them ”

Q3a: Please tell me the factors you consider before buying home decoration/ house ware. You can mention as many as you can think of

Consideration factors when purchasing fashion accessories

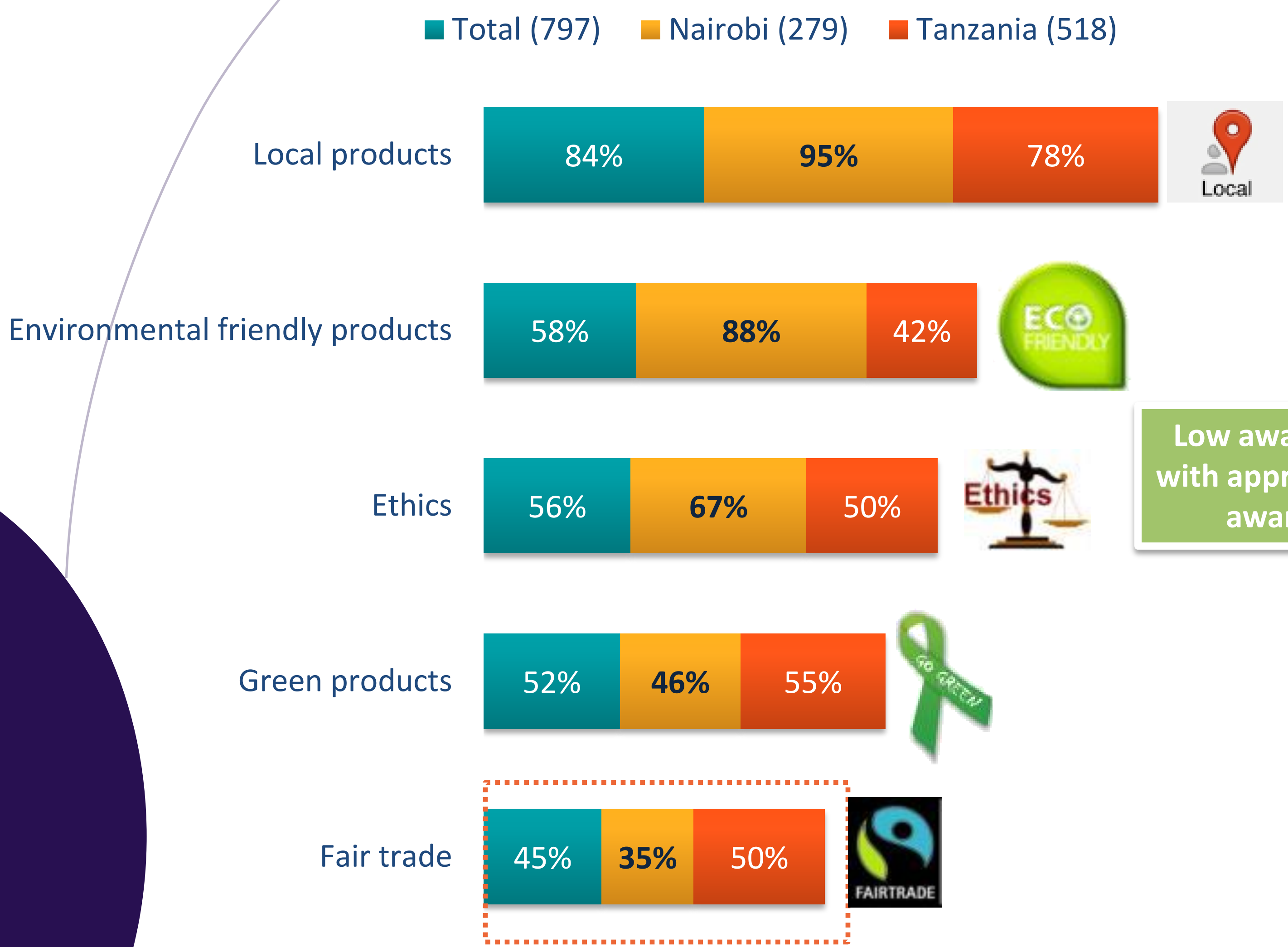


Quality, Price, Beauty and attractiveness are the top consideration factors when buying fashion accessories 3

Q3b: Please tell me the factors you consider before buying fashion accessories. You can mention as many as you can think of. First, tell me what you consider

Fair-trade, awareness and perception

Terminology awareness levels



Low awareness of the term Fair-trade with approximately 45% acknowledging awareness of the terminology

Q5a: will now read out some terms. Have you ever heard/know the term...?

Perceived meaning

Indications of knowledgeable ideas regarding the different terminologies related to fair-trade. Correct interpretation was note d for most of the terminologies

Fair-trade

N= 358	
Trading on favorable terms of business/Trading with fairness	84%
Buying at an affordable price	4%
Exhibition that promotes and markets ones products	3%
Brand Name	1%
Trade between two different nations with standardised terms	1%
This is a legal trade	1%
Deals with handcrafts	1%

Ethics

N= 446	
Code of conduct	48%
Moral behaviour	33%
Accepted behaviour	11%
Way of life	7%

Green products

N= 414	
Non harmful products	60%
Eco- friendly	13%
Products approved by TBs	8%
Fruits and vegetables	5%
Horticulture	2%
Recycled products	2%
New and fresh products	2%
Natural products	2%

Local products

N= 668	
Products made in the country	96%
Products sold in country/Available	9%

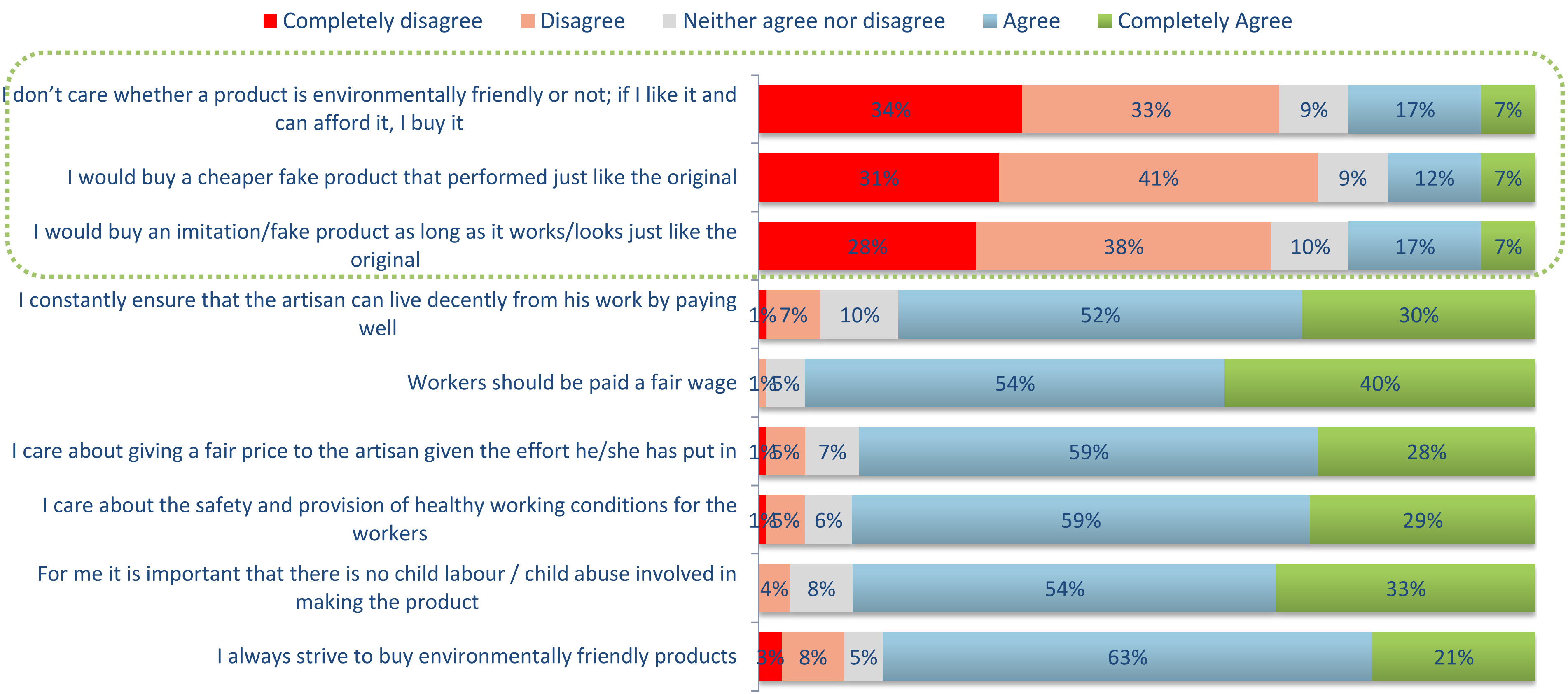
Environmental friendly products

N= 465	
Products that do not harm/pollute/negatively affect the environment	69%
Products that do not harm/pollute/negatively affect human health	9%
Products which are not harmful or hazards	6%
Products made for certain weather seasons	4%
Products made for people in need of them	4%
Products made for/found in specific places	3%
products that are bio degradable/ decomposing	2%

Q5b: You mentioned that you are aware of the terminology.......[Fair trade]

Agreement to statements

Respondents seem to be conscious of environmentally friendly products. There is also an aversion towards cheaper/imitations in the market - indicating that the respondents are willing to pay for quality products

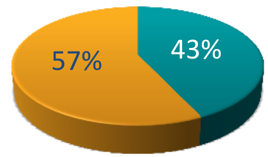


Q5c: The following are general statements made by people like you. I would like you to tell me the extent to which agree or disagree with each statement. Please be as honest as possible and remember there is no right or wrong answer

Past purchase and perception towards fair-trade items

Most of the respondents fear that the Fair Trade items will be sold at a higher price and that there will be many imitations of the same in the market which would eventually lead to cheaper options. Main advantages sighted include better quality items and affordable cost of commodities sold

Whether purchased (n=797)



Advantages

Disadvantages

8: Having heard about the concept of Fairtrade, what are some of dis/advantages of these products?

Preferred purchase points of Fair-trade items and suggested introductions into the market - unmet needs in the market

African handicrafts are mostly sold in the open air cultural markets on pre assigned days. There are the preferred purchase points for Fair Trade items as suggested by the respondents

Preferred purchase points

	Total (797)	Nairobi (279)	Tanzania (518)	18 - 29 (427)	30 - 39 (273)	40 – 44 (40)	45+ (57)	Male (370)	Female (427)
Markets	48%	26%	60%	51%	46%	40%	40%	52%	45%
Shops	5%	2%	7%	6%	5%	5%	2%	5%	6%
Supermarkets	5%	15%	0%	4%	7%	10%	5%	5%	6%
All over the country	4%	1%	5%	3%	4%	5%	11%	3%	4%
National events/international events	2%	0%	2%	1%	2%	5%	0%	1%	2%
Anywhere	2%	1%	3%	3%	1%	3%	2%	3%	2%
All over the world	2%	0%	2%	1%	2%	0%	5%	2%	1%
Malls	1%	3%	0%	1%	1%	0%	0%	1%	1%

There is a noted need for innovative African Attire and Prints which are both attractive and of good quality.

Suggested introductions

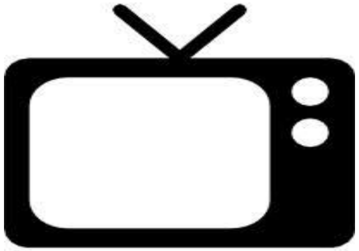
	Total (797)	Nairobi (279)	Tanzania (518)	18 - 29 (427)	30 - 39 (273)	40 - 44 (40)	45+ (57)	Male (370)	Female (427)	User (797)	AB (445)	C1 (308)	C2 (44)
African attite/prints	9%	8%	9%	7%	12%	21%	7%	11%	7%	9%	8%	10%	18%
Carvings	3%	0%	5%	3%	3%	10%	4%	3%	3%	3%	1%	6%	2%
Jewelery African designs	3%	0%	5%	4%	2%	3%	2%	2%	4%	3%	2%	3%	11%
Wall decorations	2%	3%	2%	2%	2%	3%	2%	3%	1%	2%	2%	2%	5%
Handbags	2%	1%	2%	2%	3%	0%	0%	2%	2%	2%	2%	2%	2%
Carpets	2%	1%	2%	2%	1%	3%	0%	2%	2%	2%	1%	3%	5%

Social activities

Sources of information regarding handicrafts

- Consumers in Nairobi look more to the Internet, friends and relatives when looking for information regarding handicrafts, while consumers in Tanzania refer mostly to the television for information regarding handicrafts.
- Important to note is the diversified use of media between the two countries: one case in point as an example is Magazines - more popular in Kenya compared to Tanzania while Radio is widely preferred in Tanzania as opposed to Kenya

	Total (797)	Nairobi (279)	Tanzania (518)	18 - 29 (427)	30 - 39 (273)	40 - 44 (40)	45+ (57)	Male (370)	Female (427)
Television	61%	42%	72%	63%	59%	53%	65%	62%	60%
Friends and relatives	58%	51%	62%	59%	52%	68%	67%	56%	59%
Radio	51%	20%	68%	53%	47%	58%	47%	54%	48%
Newspapers	47%	26%	58%	49%	43%	53%	44%	51%	43%
In-store/when visiting a Point of Sale e.g. market/ supermarket etc	39%	47%	34%	37%	40%	55%	35%	43%	35%
Internet	35%	55%	25%	39%	34%	23%	23%	40%	31%
Local fashion magazines	28%	41%	21%	27%	32%	28%	19%	25%	31%
Cell Phone(SMS/Internet)	10%	17%	6%	9%	10%	13%	12%	12%	8%



Column percentatges

Spare time activities

- Adults aged 40-44 prefer reading as their past time activity as opposed to other groups that mostly watch TV during their free time. Most of leisure time is spent socializing with family and friends

Past time activities

	Total (797)	Nairobi (279)	Tanzania (518)	18 - 29 (427)	30 - 39 (273)	40 - 44 (40)	45+ (57)	Male (370)	Female (427)	AB (445)	C1 (308)	C2 (44)
Watching TV/movies/football etc	36%	35%	36%	36%	38%	28%	28%	38%	33%	36%	37%	25%
Reading	23%	22%	24%	23%	22%	35%	26%	23%	23%	23%	22%	36%
Listening to music	10%	8%	11%	12%	10%	0%	5%	11%	9%	9%	11%	11%
Sleeping	8%	9%	8%	8%	8%	15%	9%	6%	10%	9%	7%	11%
Socializing/ Hanging out/ /Partying	7%	13%	3%	7%	5%	10%	7%	7%	6%	8%	5%	2%
Spending time with family	6%	5%	7%	4%	8%	5%	11%	7%	6%	7%	6%	0%
Cleaning of my house	6%	3%	7%	7%	3%	13%	5%	2%	9%	4%	7%	16%
Surfing internet	5%	2%	7%	6%	5%	3%	2%	6%	4%	6%	4%	2%
Playing a sport	4%	5%	3%	3%	4%	8%	2%	6%	1%	4%	4%	2%
Swimming	4%	10%	1%	5%	4%	0%	2%	4%	4%	6%	2%	0%
Cooking	3%	8%	1%	3%	3%	8%	2%	0%	6%	4%	2%	5%
Travelling/visiting	3%	7%	0%	2%	4%	0%	0%	4%	2%	3%	2%	0%

Past time destinations

	Total (797)	Nairobi (279)	Tanzania (518)	18 - 29 (427)	30 - 39 (273)	40 - 44 (40)	45+ (57)	Male (370)	Female (427)	AB (445)	C1 (308)	C2 (44)
Visiting relatives/friends/children/family	32%	24%	36%	31%	32%	28%	40%	31%	33%	27%	39%	32%
Going to the beach	12%	0%	19%	14%	13%	10%	4%	12%	12%	9%	17%	14%
Travelling/going upcountry	10%	13%	8%	11%	9%	5%	5%	10%	10%	11%	7%	18%
Clubbing	9%	8%	10%	8%	13%	8%	4%	12%	7%	11%	8%	5%
Staying home	9%	17%	4%	7%	10%	8%	18%	6%	11%	10%	6%	7%
Church/Mosque	6%	5%	7%	4%	6%	20%	12%	4%	8%	5%	7%	11%
At the sports club	5%	7%	4%	6%	4%	3%	5%	11%	0%	6%	5%	2%
Game Park	4%	5%	3%	4%	3%	8%	4%	5%	3%	4%	2%	5%
Shopping	4%	8%	2%	3%	4%	8%	4%	2%	5%	6%	1%	0%
Cinema halls/movies	3%	3%	2%	3%	3%	0%	2%	3%	2%	4%	2%	0%
Going to the market	3%	5%	2%	3%	3%	0%	0%	1%	4%	4%	1%	2%
Swimming	3%	6%	1%	4%	2%	0%	2%	3%	3%	3%	2%	0%

Future purchase intention

Household decoration items, fashion jewellery and carpets have a higher market potential compared to other products in the market. It is therefore important that the artisans focus more on theses - by producing quality and unique pieces at a reasonable price

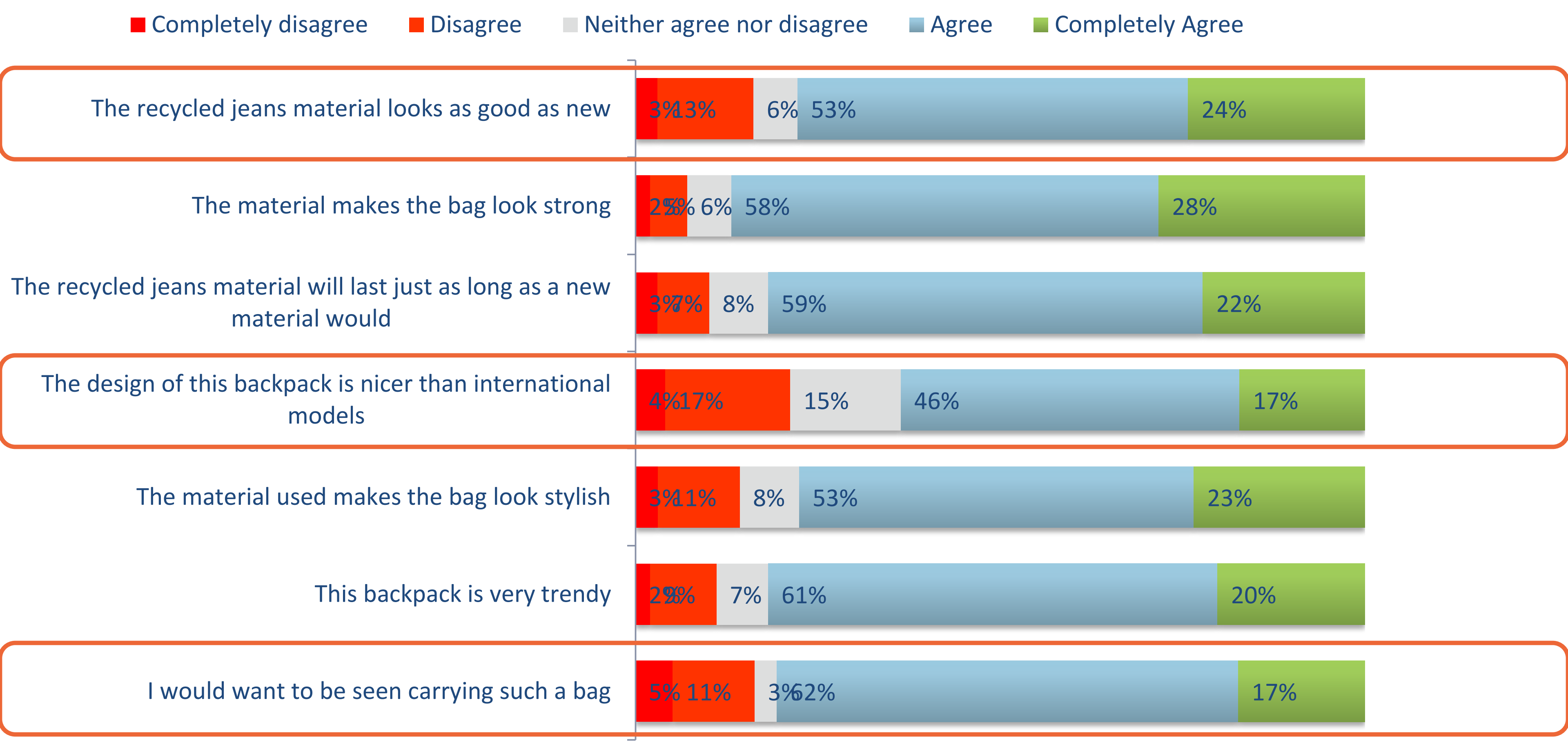
		Region		Age by years				Gender		Social Economic Class		
	Total (797)	Nairobi (279)	Tanzania (518)	18 - 29 (427)	30 - 39 (273)	40 – 44 (40)	45+ (57)	Male (370)	Female (427)	AB (445)	C1 (308)	C2 (44)
Decoration items	42%	33%	47%	43%	40%	45%	47%	38%	46%	39%	44%	64%
Fashion jewellery	38%	47%	33%	37%	36%	45%	47%	35%	40%	45%	27%	36%
Carpets	37%	15%	49%	37%	33%	55%	40%	37%	37%	26%	48%	75%
Purses	32%	14%	42%	32%	31%	40%	39%	28%	36%	30%	35%	36%
Doormats	30%	13%	39%	30%	28%	35%	32%	28%	31%	23%	37%	50%
Kikoi	30%	14%	39%	29%	32%	33%	30%	21%	37%	23%	38%	48%
Bags	25%	22%	27%	26%	24%	30%	26%	28%	23%	24%	27%	27%
Utensils made of wood	24%	7%	33%	24%	22%	30%	30%	21%	27%	18%	28%	57%
Tablemats or Placemats	17%	15%	18%	16%	19%	20%	18%	18%	17%	16%	15%	45%
Back packs	13%	11%	14%	13%	15%	5%	5%	19%	7%	13%	12%	14%
Shawls or scarfs	12%	10%	14%	11%	12%	20%	16%	9%	16%	10%	15%	25%
Computer bags	9%	6%	11%	10%	6%	15%	12%	12%	7%	10%	8%	5%

Q11: Thinking about home decorations and fashion accessories, which ones would you want to purchase in the next six months?

Concept evaluation

Jeans Back Pack - perception (agreement scales)

- Generally - the jean back pack has a high appeal among the target group. Significant to note however is that 21% of the respondents seem to disagree that the back pack was better than international models - an indication that they would still prefer the latter
- 16% would not want to be seen carrying the bag while some (19%) felt that it did not look new since it was made of recycled material.



Jeans Back Pack - perception - mean scores

- The bag has advantages mainly regarded to its strong look, and assuredness on durability.
- The weakest score were in regards to that the pack not being viewed to be better than the international bag - this indicates that most of the target market would opt for the international bags - steps should therefore be made to improve the design of the back pack as well as diversifying on brighter, long-lasting and attractive colors

	Total	Nairobi	Tanzania	18 - 29	30 - 39	40 - 44	45+	Male	Female	User	Non User
The material makes the bag look strong	4.06	4.04	4.08	4.06	4.07	4.00	4.09	4.11	4.01	4.06	3.96
The recycled jeans material will last just as long as a new material would	3.92	3.82	3.97	3.93	3.9	4.00	3.82	3.95	3.88	3.92	3.88
This backpack is very trendy	3.87	3.54	4.07	3.91	3.84	3.68	3.86	3.97	3.79	3.87	3.96
The recycled jeans material looks as good as new	3.84	3.54	4.01	3.81	3.9	3.89	3.68	3.89	3.79	3.83	3.96
The material used makes the bag look stylish	3.82	3.43	4.04	3.83	3.81	3.73	3.75	3.92	3.73	3.82	3.81
I would want to be seen carrying such a bag	3.76	3.28	4.03	3.82	3.78	3.43	3.46	3.87	3.66	3.77	3.46
The design of this backpack is nicer than international models	3.55	3.2	3.76	3.58	3.48	3.45	3.81	3.59	3.52	3.55	3.58

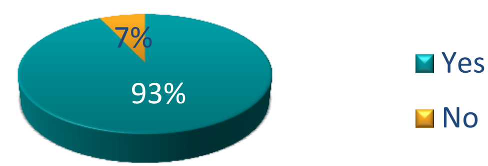
Mean scores were calculted out of a possible score of 5.00

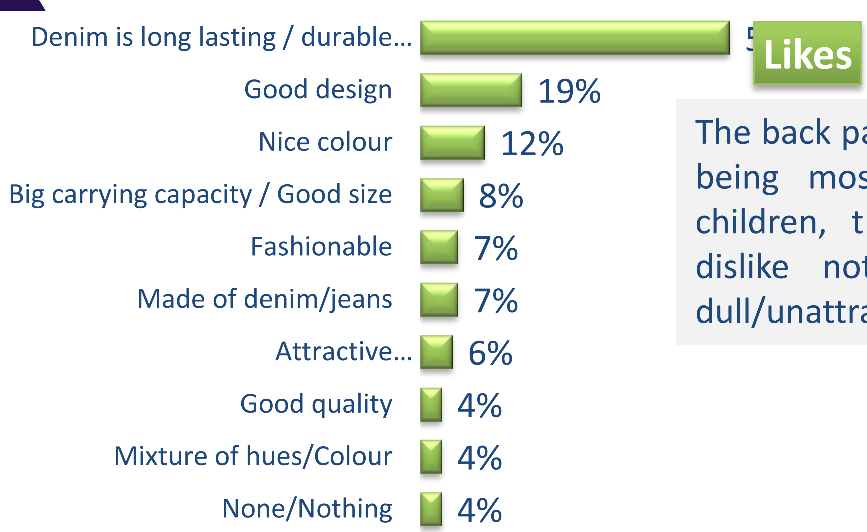
Likelihood of purchase, likes, dislikes and suitability

	Total (823)	Nairobi (297)	Tanzania (526)	18 - 29 (443)	30 - 39 (283)	40 - 44 (40)	45+ (57)	Male (386)	Female (437)	User (797)	Non User (26)
Probability of buying for SELF	3.74	3.43	3.91	3.79	3.73	3.6	3.44	3.9	3.6	3.74	3.73
Probability of buying for SOMEONE ELSE	3.85	3.87	3.77	3.93	4.02	3.86	3.84	3.86	3.54	3.78	3.93

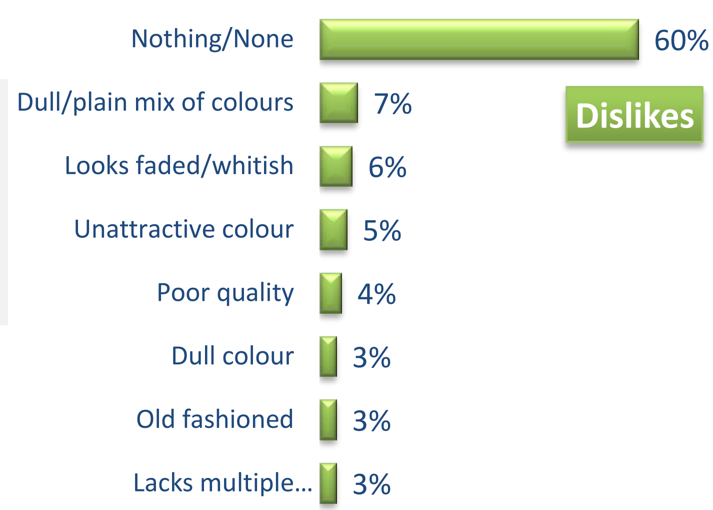
	Total (702)	Nairobi (206)	Tanzania (496)
Younger sibling (brother/sister)	25%	3%	35%
My children	18%	7%	23%
Brother	13%	26%	7%
Son	12%	20%	8%
My friend	6%	7%	5%

Suitability for children



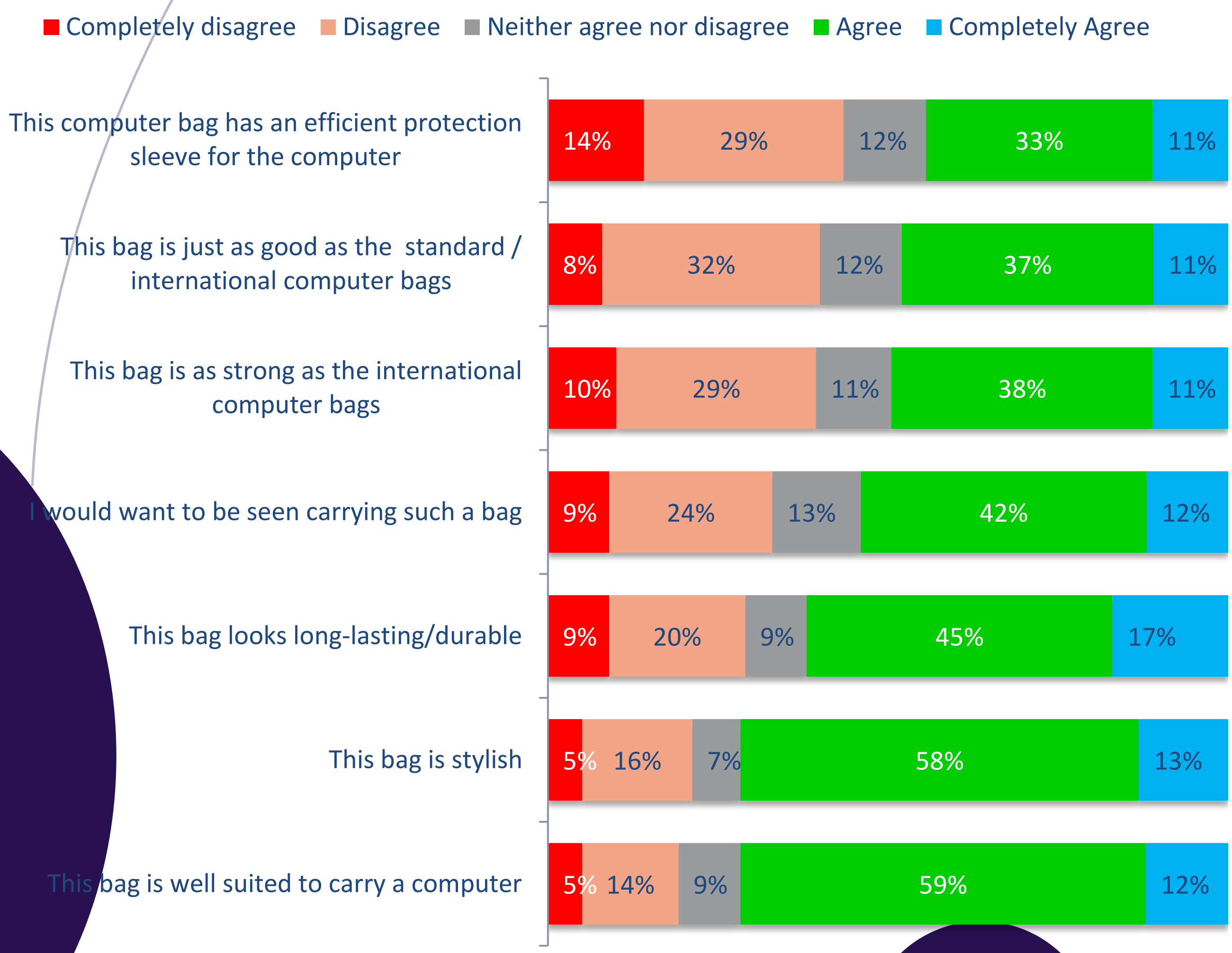


The back pack is viewed as being most suitable for children, the only major dislike noted were the dull/unattractive colors



Computer Bag - perception (agreement scales)

- 43% of the respondents felt that the computer bag did not have an efficient protection sleeve for the computer; 40% felt that the bag was not as good as the international model while 39% felt it was not as strong as the international models.



Computer bag - perception - mean scores

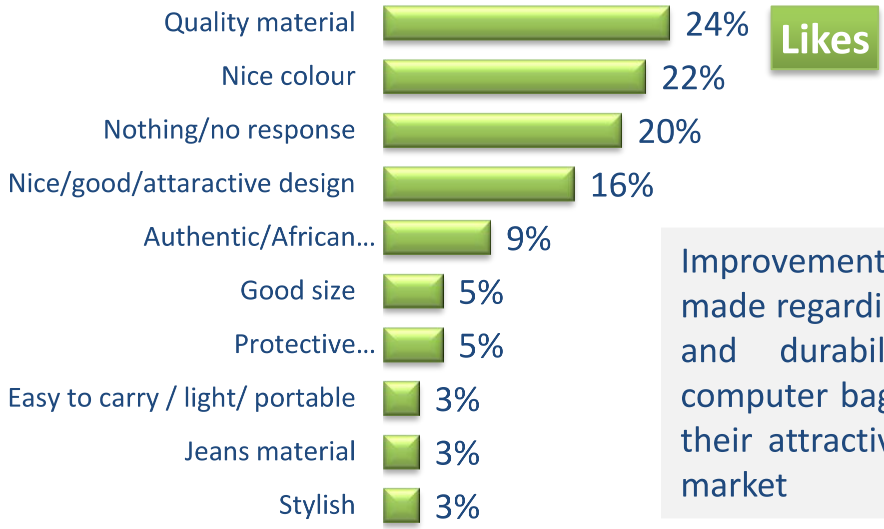
	Total	Nairobi	Tanzania	18 - 29	30 - 39	40 - 44	45+	Male	Female	User	Non User
This bag is well suited to carry a computer	3.59	3.38	3.71	3.61	3.51	3.65	3.74	3.63	3.54	3.6	3.19
This bag is stylish	3.58	3.23	3.77	3.64	3.48	3.53	3.61	3.63	3.53	3.59	3.31
This bag looks long-lasting/durable	3.41	3.14	3.56	3.49	3.31	3.33	3.32	3.45	3.37	3.41	3.23
I would want to be seen carrying such a bag	3.22	2.95	3.37	3.33	3.09	3.25	2.98	3.27	3.17	3.23	3.08
This bag is just as good as the standard / international computer bags	3.10	2.86	3.23	3.16	2.98	3.1	3.18	3.15	3.06	3.11	2.77
This bag is as strong as the international computer bags	3.10	2.85	3.24	3.17	2.99	3.15	3.05	3.11	3.1	3.11	2.92
This computer bag has an efficient protection sleeve for the computer	2.98	2.8	3.08	3.06	2.85	3.00	2.98	3.00	2.96	2.98	2.96

The computer bag attained above average scores with the main strengths being suitability to carry a computer and stylish look

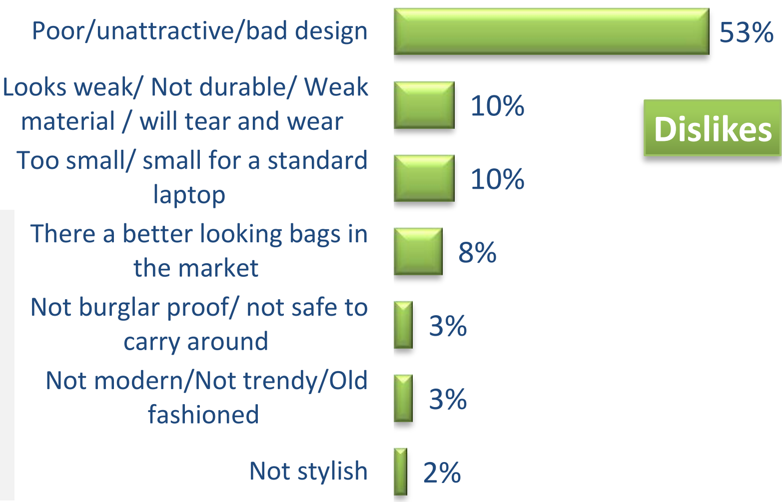
Likelihood of purchase, likes, dislikes and suitability - computer bag

	Total (823)	Nairobi (297)	Tanzania (526)	18 - 29 (443)	30 - 39 (283)	40 - 44 (40)	45+ (57)	Male (386)	Female (437)	User (797)	Non User (26)
Probability of buying for SELF	3.06	2.86	3.17	3.09	2.99	3.25	3.07	3.09	3.03	3.07	2.65
Probability of buying for SOMEONE ELSE	3.04	2.75	3.21	3.08	2.93	3.13	3.26	3.09	3.01	3.05	2.73

	Total (429)	Nairobi (124)	Tanzania (305)
Younger sibling (brother/sister)	20%	0%	28%
Brother	18%	19%	17%
Friend	18%	26%	15%
Sister	11%	15%	9%
My children	7%	0%	10%

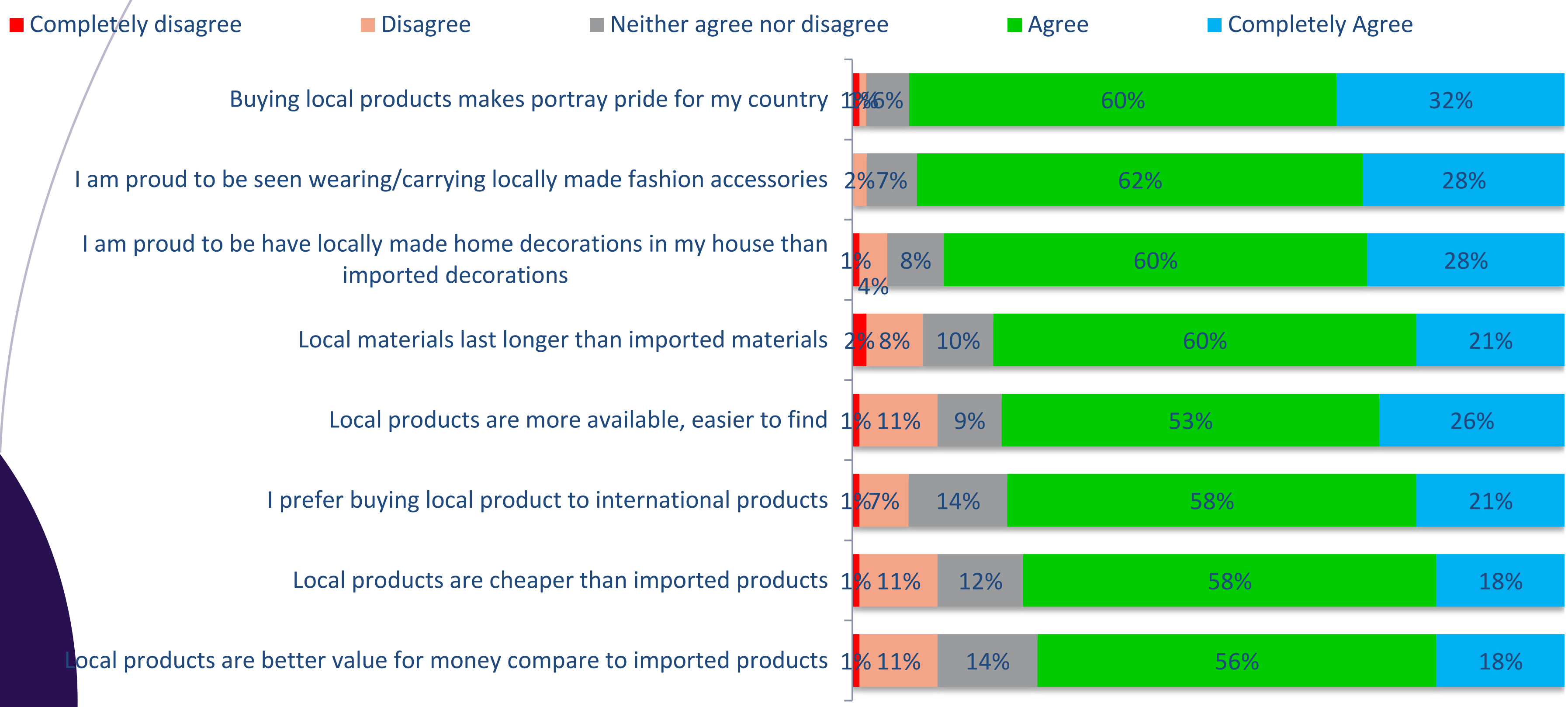


Improvements need to be made regarding the design and durability of the computer bags to improve their attractiveness in the market



Local vs. international products

Purchase of local products is perceived to portray patriotism for one's country. Majority of the respondents are proud to be seen wearing/carrying locally made accessories and most are also proud to have locally made traditional home decorations in their homes



Local vs. international products

Scores relating to the statements relate an underlying preference for local products vis-à-vis international products

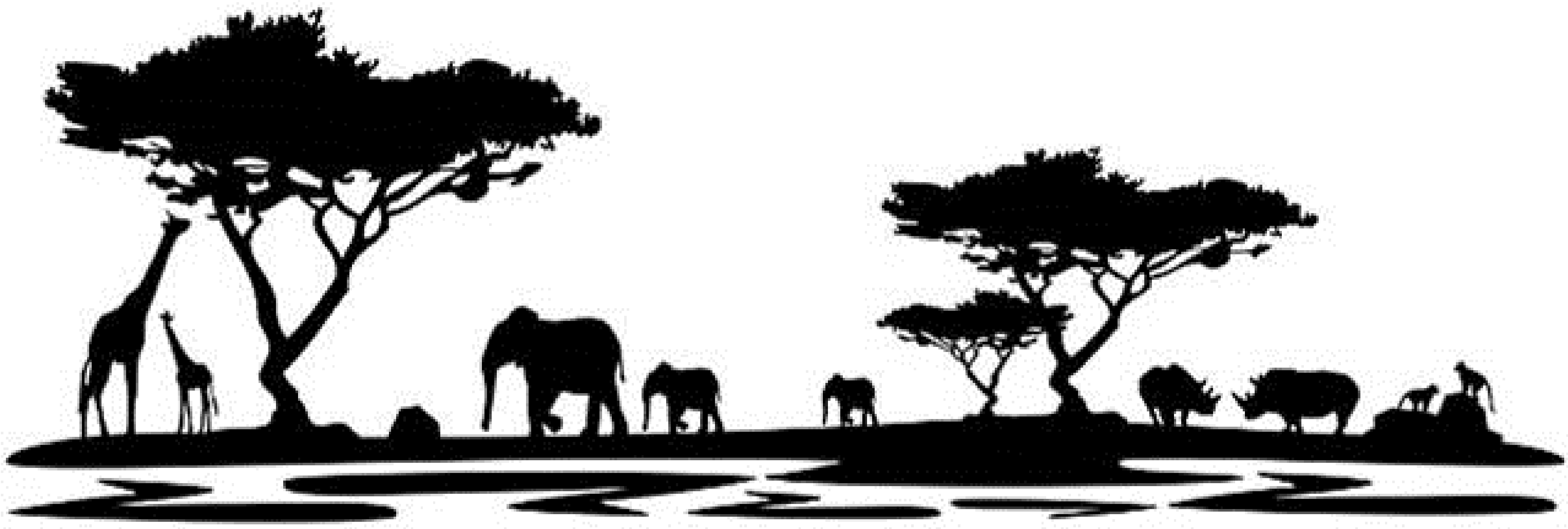
	Total	Nairobi	Tanzania	18 - 29	30 - 39	40 - 44	45+	Male	Female	AB	C1	C2
Buying local products makes portray pride for my country	4.23	4.29	4.19	4.21	4.26	4.28	4.14	4.29	4.18	4.26	4.18	4.25
I am proud to be seen wearing/carrying locally made fashion accessories	4.17	4.18	4.16	4.18	4.12	4.30	4.23	4.22	4.12	4.16	4.19	4.09
I am proud to be have locally made home decorations in my house than imported decorations	4.11	4.05	4.14	4.12	4.11	4.18	4.00	4.16	4.07	4.08	4.16	4.09
Local products are more available, easier to find	3.92	3.84	3.96	3.98	3.83	3.88	3.96	4.01	3.84	3.80	4.07	4.07
I prefer buying local product to international products	3.91	3.83	3.95	3.91	3.92	4.00	3.74	3.91	3.91	3.86	3.95	4.16
Local materials last longer than imported materials	3.90	3.86	3.93	3.88	3.89	4.20	3.91	3.92	3.89	3.88	3.86	4.48
Local products are better value for money compare to imported products	3.81	3.95	3.73	3.79	3.80	3.88	3.91	3.86	3.76	3.85	3.69	4.18
Local products are cheaper than imported products	3.80	3.85	3.78	3.80	3.81	3.70	3.86	3.86	3.75	3.72	3.88	4.07

Purchase frequency

Purchase of handicrafts is generally at the same frequency as the past. Most of the respondents admit to buying in the same frequency or slightly more than they used to

	Total (797)	Nairobi (279)	Tanzania (518)	18 - 29 (427)	30 - 39 (273)	40 - 44 (40)	45+ (57)	Male (370)	Female (427)	User (797)	AB (445)	C1 (308)	C2 (44)
I buy African handicrafts less frequently than I used to	15%	16%	14%	15%	16%	13%	11%	15%	15%	15%	19%	11%	7%
I buy African handicrafts in the same frequency as I used to	46%	48%	46%	45%	46%	58%	47%	47%	46%	46%	49%	41%	55%
I buy more African handicrafts nowadays compared to the past	39%	36%	40%	40%	38%	30%	42%	38%	39%	39%	32%	48%	39%

Thank you!



Asante Sana!

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