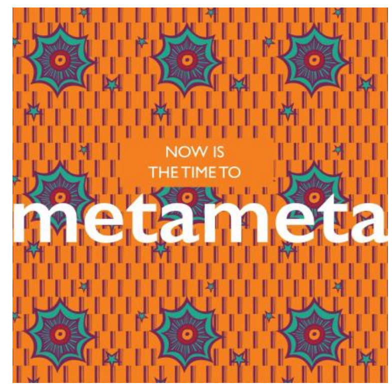
AFRICAN FABRIC DESIGNS

Report - UndaMeta Omnibus Section (Kenya, November 2022)

Background

- UndaMeta is an initiative by Teresa Lubano (Shop Nanjala) and Dr. Francisca Odundo (University of Nairobi), which is supported by the African Hub for Sustainable Creative Economies.
- UndaMeta is an online platform, showcasing African-inspired fabric designs for sale; it will link fabric designers, fabric producers, and fashion producers.
- The objective of inserting questions in Infinite Insight's omnibus survey was to
  - Estimate the proportion of Kenyan consumers, who buy fabrics vis-à-vis ready-to-wear clothes from retail outlets and second-hand apparel (mitumba)
  - To ascertain the popularity of African designs when purchasing fabrics
  - To measure support for an African-based value chain in the production and design of fashion
  - To gauge Kenyan consumers' acceptance of sharing African designs with Non-Africans; i.e. whether misgivings about "cultural appropriation" come into play
- Infinite Insight was authorised by UndaMeta to publish the results of the study.



Omnibus vs. Online Panels

- When Infinite Insight & Consumer Ideas decided to launch syndicated services with different sample sizes (Omnibus: n=2,000 / Taxi: n=1,000) and different methodologies (CATI wherever feasible), it was with the following rationales in mind:
  - Research among members of the public or general consumers can remain affordable: costs are standard for each question inserted reduce research costs per participating client when compared to ad-hoc research. In Kenya, the cost per pre-coded question is $300 for a sample size of 1,000 respondents.
  - There are no Trade-offs in terms of coverage or quality! Fully nationally-representative samples, including rural locales, with fresh, randomly selected respondents (CATI: RDD; CAPI: Kish Grid), compare favourably against online panels, which, in our part of the world, still tend to be skewed toward young, urban, and educated consumers.
  - Customisations are possible to accommodate special requests by individual clients; e.g. booster samples. Costs for booster samples are calculated based on scale and respondent profiles.
  - Fast turn-around: time in field for 1,000 sample in the November Kenya Taxi was just 7 days.

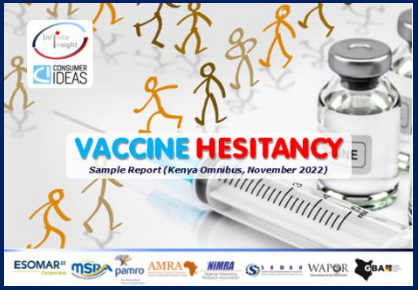
Cost Breakdown:

- **African Fabric Designs:**

  4 questions, totalling $1,200; i.e. **$1.2** per respondent

- **Vaccine Hesitancy:**

  7 Questions, totalling $2,100; i.e. **$2.1** per respondent



Demographic variables (e.g. gender, age, etc.) are part of the omnibus package; subscription charges are only calculated on the number of proprietary questions booked by participating clients.

Download the Brochure and Rate Cards: https://infiniteinsight.net/II&CI_Syndicated_Research_Brochure.pdf

1 Thinking about clothes you wear, which of the following do you do?

I buy ready-to-wear clothes in retail outlets	1
I buy second-hand clothes	2
I buy fabrics to have a tailor or seamstress make outfits for me	3
Don't know	98
Refused	99

2 Thinking of the fabrics you buy, what proportion would be African designs?

African Designs	
Other designs	
Total	**100%**

3 Thinking about the fabrics with African design, how important is it to you that the fabric is made, i.e. produced, designed, and tailored, in Africa?

Very Important	1
Somewhat Important	2
Not very Important	3
Not Important at all	4
Don't know	98
Refused	99

4 Some people object to Non-Africans wearing African or African-inspired designs and denounce it as cultural appropriation. How do you feel about this? Do you:

Agree completely	1
Agree somewhat	2
Neither agree nor disagree	3
Disagree somewhat	4
Disgree completely	5
Don't know	98
Refused	99

Methodology

- The poll was conducted telephonically (CATI), using mixed method dialling protocols (RDD + geographically targeted calling).
- Quality Control measures included verification calls and auditing of recorded interviews; Informed Consent was obtained from all respondents.
- Results are nationally representative by province, urbanisation within each province, and gender. The table to the right lists unweighted results. Imbalances were corrected by weighting educational achievement.
- The Universe is Kenyans, aged 18 and above.
- Fieldwork was conducted between 15th and 21st November, 2022.
- The Achieved Sample was **1,014** respondents.
- The Margin of Error is **±3.1%** at 95% Confidence.

Achievement:

- **Total: 1,014**
  - Nairobi: 9.1%
  - Rift Valley: 26.3%
  - Central: 11.0%
  - Coast: 10.2%
  - Eastern: 14.2%
  - North-Eastern: 4.2%
  - Nyanza: 14.5%
  - Western: 10.5%
- **Gender:**
  - Male: 49.6%
  - Female: 50.4%
- **Urbanisation:**
  - Urban: 31.0%
  - Rural: 69.0%
- **CATI Protocols:**
  - RDD: 75.7%
  - Target Dialing: 24.3%

Prospects for Promoting African Textiles & Designs

- The importation and sale of second-hand clothes (mitumba) is controversial across East Africa. After President Kenyatta had plans to ban importation in 2017, the threat of being excluded from AGOA resulted in the plans being shelved in the same year. In 2020, a ban was implemented, but lifted again in the following year.*
- Proposals to reinstate a ban on mitumba are tabled regularly.
- The sector is expanding and represents a sizeable factor in Kenya's economy; however, the importation and sale of second-hand clothing impacts negatively on domestic production and sales.**
- Natural cotton, fabrics, and designs from sub-Saharan Africa are increasingly in demand internationally:***

  The demand for African designs, textiles and garments is increasing within and beyond the continent. Currently, in Sub-Saharan Africa, the combined apparel and footwear market is estimated at USD 31Billion. The textile industry in Africa is estimated to grow at a CAGR (Compound Annual Growth Rate) of 5% over the forecast period of 2019-2024.****

Sources:
* https://www.kenyans.co.ke/news/76163-how-us-threat-kenya-saved-mitumba-businesses
** https://businesstoday.co.ke/mitumba-betty-maina-ministry-of-industrialization/
*** https://www.fibre2fashion.com/industry-article/9406/sub-saharan-africa-potential-and-challenges-in-textiles-apparel-industry
**** Circular economy in Africa_Fashion and textiles - Ellen Macarthur Foundation

Sources for Clothing

Almost 9 out of 10 Kenyans (88%) buy second-hand clothes; commonly known as "mitumba", second-hand clothes are imported in bulk and re-sold mainly by street vendors and in local markets.

Ready-to-wear clothes are purchased in retail outlets, ranging from small shops and boutiques to retail chains situated in malls and shopping centres; 62% of Kenyans buy ready-to-wear clothes at least occasionally.

Less than half (48%) buy fabrics for custom-made apparel.

Base: Total Sample (weighted); n=1,013

Sources for Clothing

- By Demographics

Buying second-hand clothing is a common across all demographic groups; not even self-perceived economic status influences purchasing behaviour. In contrast, urban locale and above-average economic status impact on buying ready-to-wear.

Buying fabrics to have them stitched is decidedly more common among women, older respondents, and people with average economic status.

	Total	Gender		Age		Household Economic Comfort				
		Male	Female	18 - 34 yrs	35 yrs. +	>> Average	> Average	Average	< Average	<< Average
Base (unweighted):	*1014*	*503*	*511*	*613*	*401*	*40*	*290*	*247*	*235*	*194*
Base (weighted)	*1013*	*482*	*531*	*608*	*406*	*33*	*300*	*241*	*239*	*193*
	%	%	%	%	%	%	%	%	%	%
I buy second-hand clothes	**88**	88	88	87	89	88	84	90	89	90
I buy ready-to-wear clothes in retail outlets	**62**	62	62	61	64	***81***	67	67	61	46
I buy fabrics to have a tailor or seamstress make outfits for me	**48**	35	***59***	42	***55***	36	46	***58***	45	42

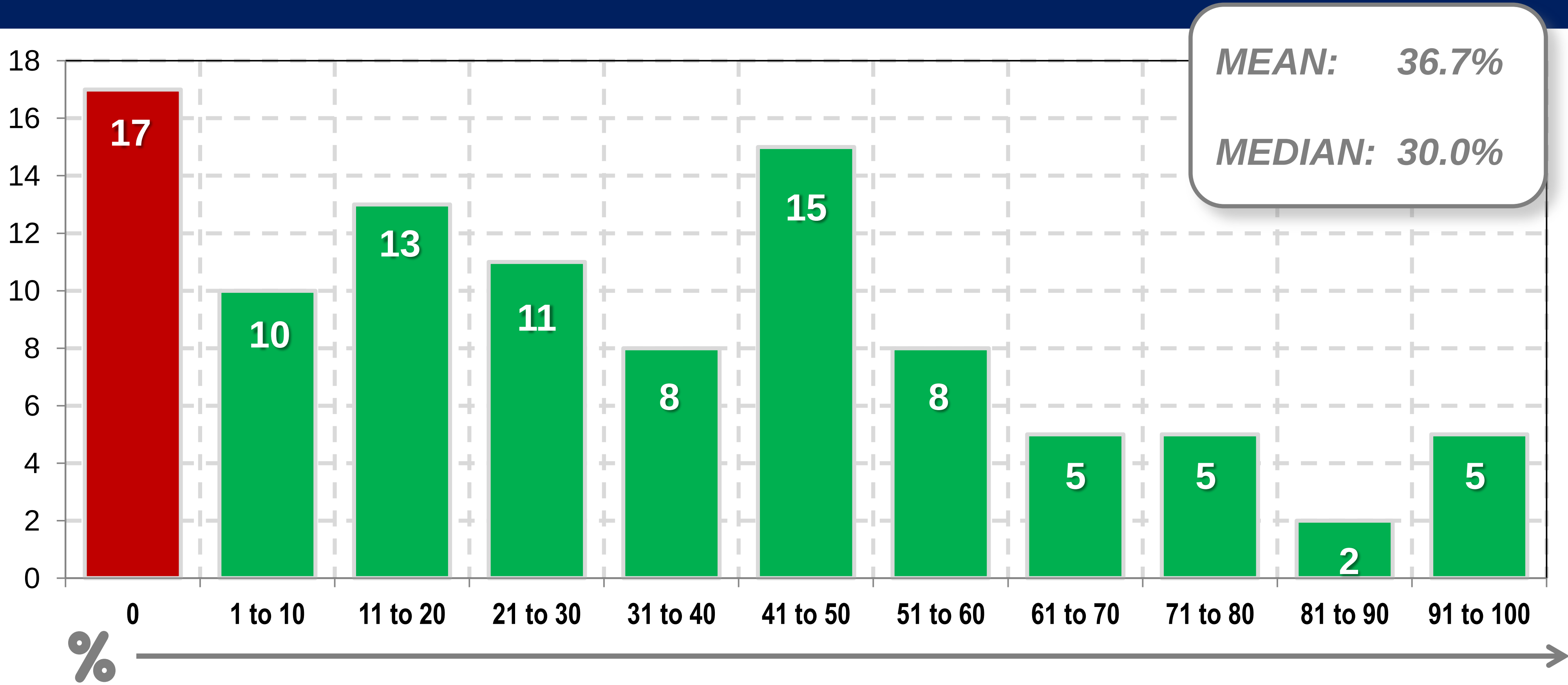
	Total	Urbanisation		Province							
		Urban	Rural	Central	Coast	Eastern	Nairobi	North Eastern	Nyanza	Rift Valley	Western
Base (unweighted):	*1014*	*314*	*700*	*112*	*103*	*144*	*92*	*43*	*147*	*267*	*106*
Base (weighted)	*1013*	*339*	*674*	*136*	*92*	*152*	*113*	*40*	*124*	*257*	*97*
	%	%	%	%	%	%	%	%	%	%	%
I buy second-hand clothes	**88**	88	88	85	85	87	87	86	91	90	91
I buy ready-to-wear clothes in retail outlets	**62**	***70***	58	66	64	53	68	72	53	64	63
I buy fabrics to have a tailor or seamstress make outfits for me	**48**	45	49	48	46	43	40	***56***	51	49	52

Proportion of African Designs Of Clothes or Fabrics Bought

Since African designs are also available ready-to-wear, e.g. in boutiques or Maasai markets, the question was asked of every respondent.

Almost one-fifth of Kenyans (17%) do not buy clothes or fabrics with African designs.

On average, 37% of clothes or fabrics bought are of African design or at least African-inspired.



Base: Total Sample (weighted); n=1,013

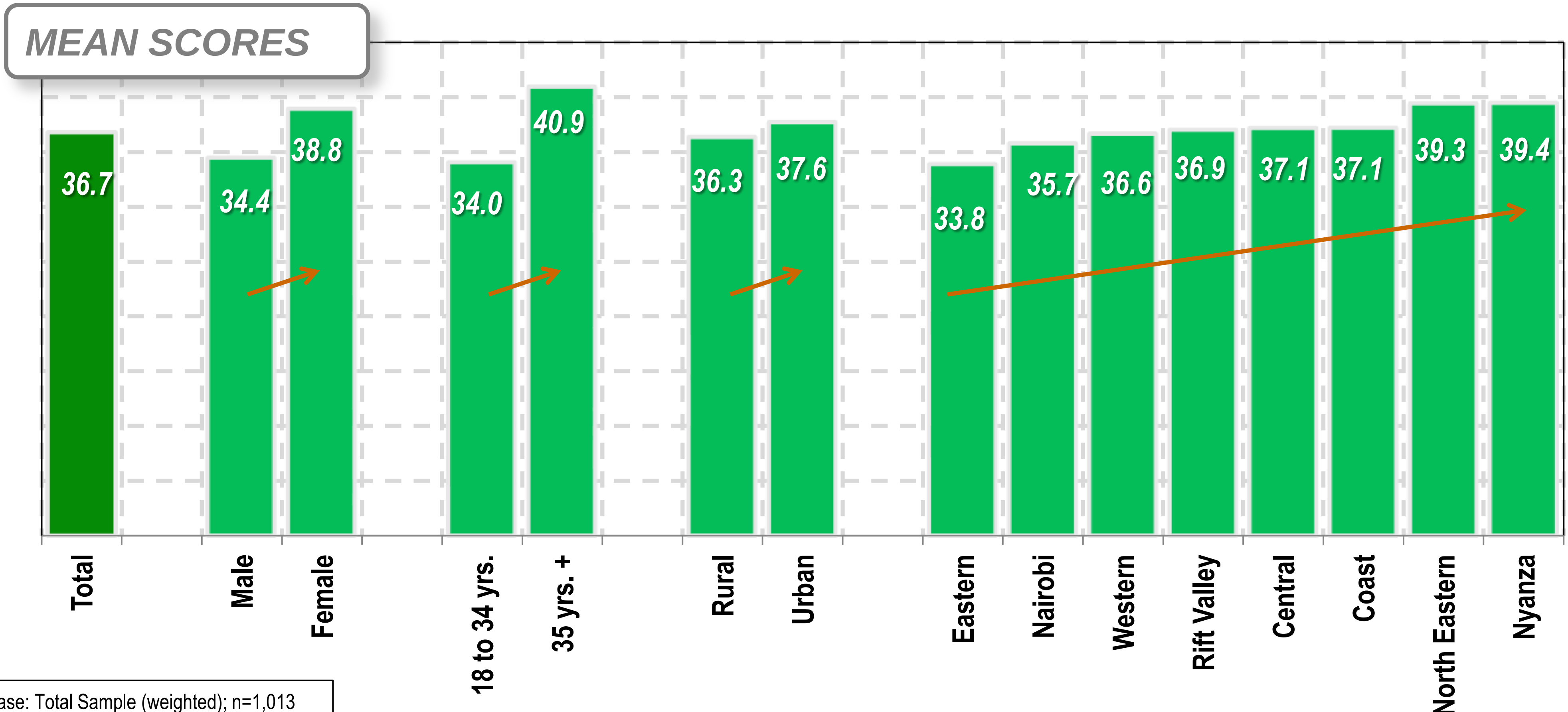
Proportion of African Designs Bought

- By Demographics

Nationally, 37% of clothes or fabrics bought are of African design. Women tend to indulge more than men; urban dwellers more than consumers in rural areas; older consumers more than those below the age of 35.

Among provinces, North Eastern and Nyanza lead the pack, while Eastern and Nairobi have the lowest mean scores.

Mean scores, however, should be taken with a grain of salt: differences are not statistically significant.



Base: Total Sample (weighted); n=1,013

Proportion of African Designs Bought
- By Household Economic Comfort Level

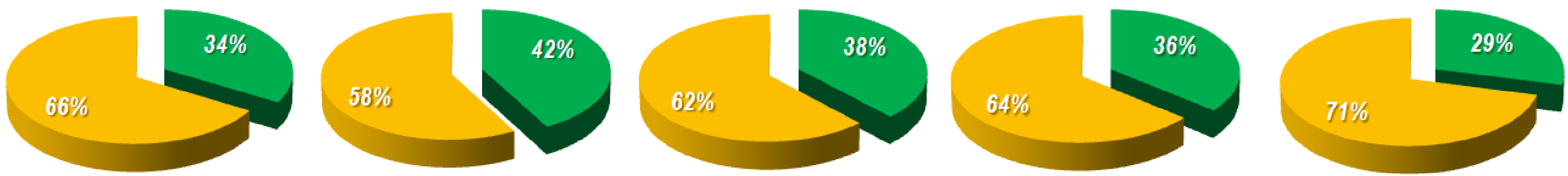
The national average proportion of buying African designs is 36.7%.

By self-assessed Household Economic Comfort Segments, it appears that selecting African designs is more of a middle class preference: among the very top (Household income of $410) and the very lowest segments (Household Income of $88), African designs achieve the lowest mean scores.

However, the differences are not statistically significant and avail themselves to an intuitive reading, only.

>> AVERAGE	> AVERAGE	AVERAGE	< AVERAGE	<< AVERAGE
← Size of Segment (%) →				
3.2%	29.6%	23.8%	23.6%	19.1%

← Mean: African Design →



← Average Monthly Household Income in US$ →

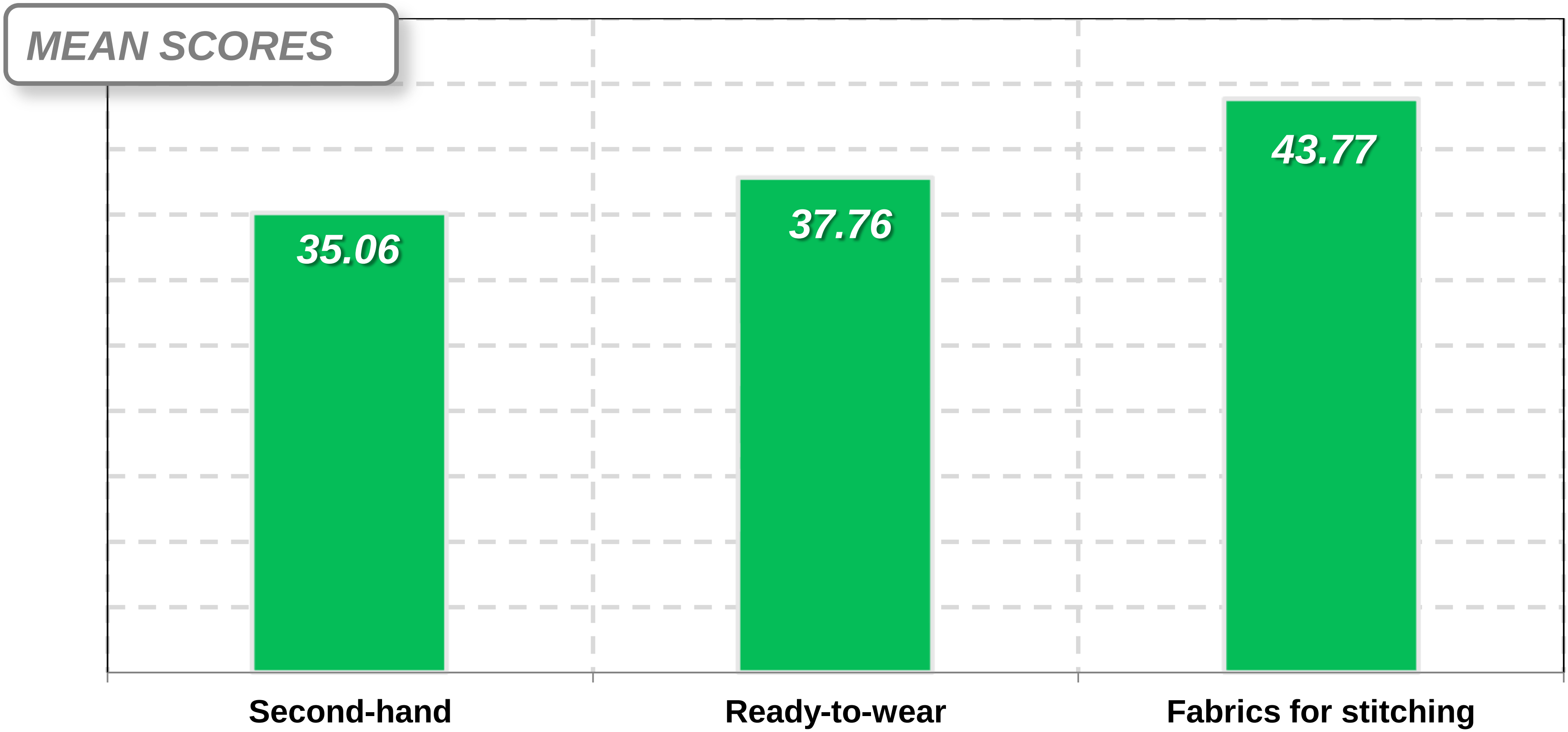
$410.0	$271.6	$209.8	$154.0	$87.6

Base: Total Sample (weighted); n=1,013

Proportion of African Designs among Buyers of…

On average, Kenyan consumers purchase clothing / fabrics through two channels. As there were no *solus* buyers of fabrics, lines between channels become a bit blurred.

But the average proportion (mean score) of African designs increases from Second-hand, to Ready-made, and to Fabric for stitching.



Base: Those buying…	n=900	n=619	n=470

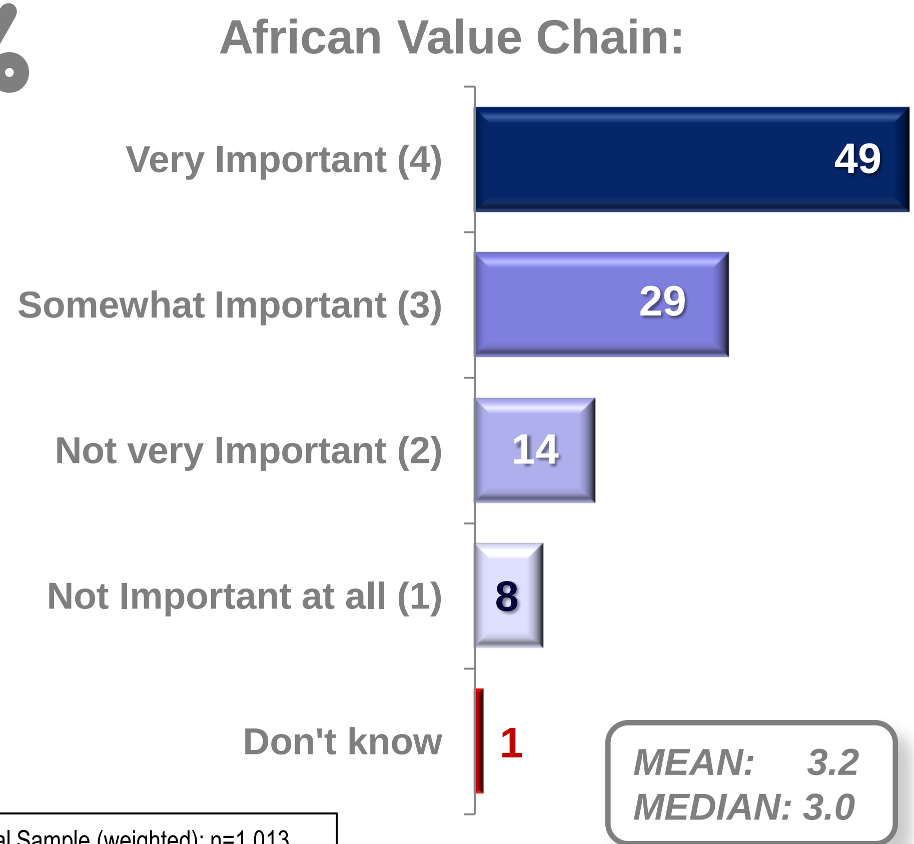
Importance of an African Value Chain & Cultural Appropriation

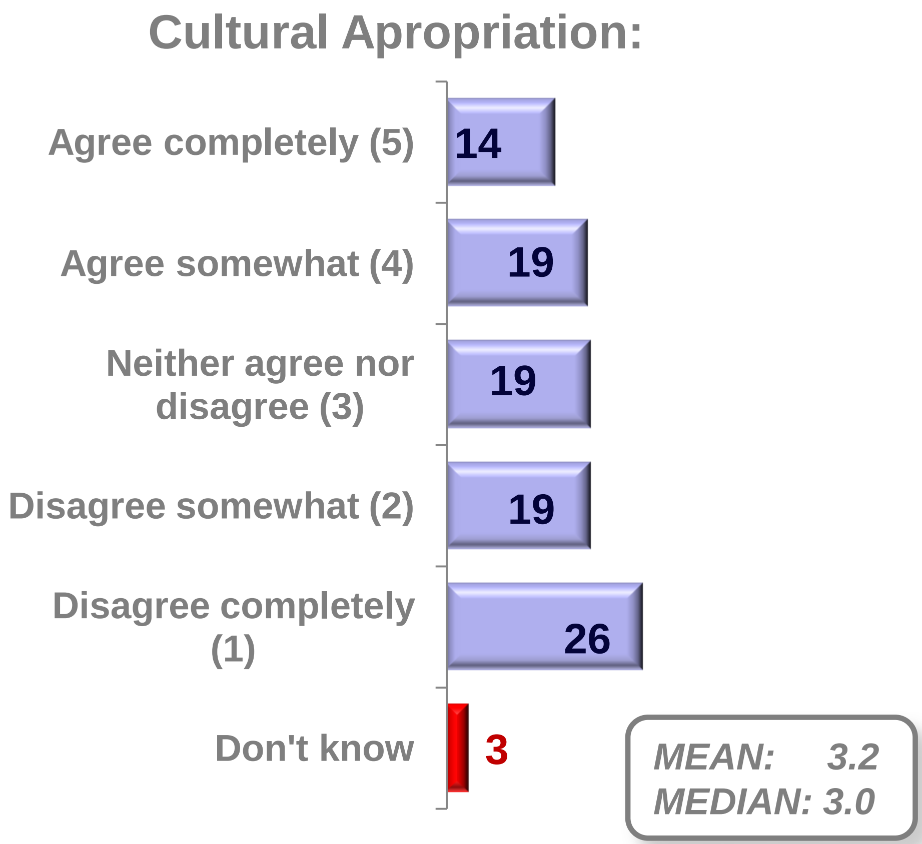
Kenyan consumers feel that an African value chain, from production, design, and tailoring, is important (78% somewhat / very important). Just 1 in 5 (22%) feel that this is not really an issue.

When asked whether it represents cultural appropriation for non-Africans to wear African designs, 33% agreed somewhat or completely. About a fifth (19%) had no opinion; while a further 45% had no major objections.

It stands to reason, then, that African designs could be exported without Kenyans feeling violated in their cultural pride.

%





Base: Total Sample (weighted); n=1,013

Summary

- 9 out of 10 Kenyans, virtually across all demographic groups, buy second-hand clothing.
- 62% of consumers buy ready-to-wear apparel in shops and boutiques; this applies especially to more affluent consumers as well as to urban dwellers.
- Less than half (48%) of Kenyans buy fabrics to have them turned into bespoke outfits by their tailors or seamstresses. Buying materials is more common among women and older consumers.
- Regardless of trade channel, about 37% of fabrics and clothes purchased will have African designs. However, 17% of consumers do not purchase African designs and opt for other designs. The proportion of African designs increases to 44% among those who buy fabrics.
- 78% of consumers feel that fabrics and apparel should be produced, designed, and manufactured in Africa. A ban on importation would, therefore, not meet with outright rejection.
- Non-Africans wearing African designs is deemed "cultural appropriation" by just a third of consumers (33%). Thus, there seems to be little opposition to have African designs exported to the world.

APPENDIX

The Team

Margit Cleveland,
Managing Director
(Infinite Insight, Kenya)

For more than 35 years, Margit has worked in markets as diverse as Germany, USA, and Sub-Saharan Africa.

Margit is a member of ESOMAR, MSRA, PAMRO (founder member) and WAPOR. From January 2013 to December 2016, Margit was the ESOMAR representative for Kenya; from January 2020 to December 2021, she was the WAPOR representative in the country.

Jean-Jacques Moolman
Managing Director
(Infinite Insight, South Africa)

Jean is based in South Africa; with more than 20 years research experience on the continent, mostly working with global clients such as Bill and Melinda Gates Foundation and particularly large international agencies. He worked for 11 years at Ask Afrika as Global Accounts Executive. Previously he was at Synovate (now Ipsos) for 6 years and another 6-year media research background in data analytics and reporting. Jean has worked on hundreds of research projects across more than 30 countries.

He has post-graduate degrees in both psychology and sociology.

Althea McCourt
Director
(Infinite Insight, Kenya)

Prior to joining Infinite Insight, Althea was the Operations Director at Research Solutions. She has over 20 years experience in management consultancy.

Althea holds an MBA – IT (University of Leicester), and a BA (Hons) in Business Studies (University of North London). She is a Member (KIM), Marketing and Social Research Association (MSRA), SAMRA, ESOMAR, and Kenya Institute of Management. In 2017, Althea was the chair person of MSRA.

Anne Mambo
Partner (DRC)

Anne has vast experience covering 20 years in multi-national corporations. She held various leadership roles including Managing Director, British American Tobacco Distribution, based in Kinshasa and Sales and Marketing Director, Diageo in both Cameroon and Kenya.

Anne studied at the University of Nairobi and Strathclyde University in Scotland. Anne is fully proficient in English, French and Kiswahili and conversational Lingala.

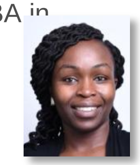
Yemi Oniyitan
Managing Director
(Consumer Ideas, Nigeria)

Yemi is an experienced market researcher with more than 20 years of experience in the industry, straddling both agency and client side as well as local and international markets. He has vast experience in social, services, media and FMCG studies.

A graduate of political science (BSc.), Yemi is well tuned-in to the socio-cultural and political interplay in consumer and public behaviour.

Naftali Waburi
Research Director , quantitative
(Infinite Insight, Kenya)

Naftali' started in market research in 2002. Naftali has handled projects in almost all the markets within the Eastern Africa Region. Naftali holds a MBA Strategic Management and an BBA in Marketing

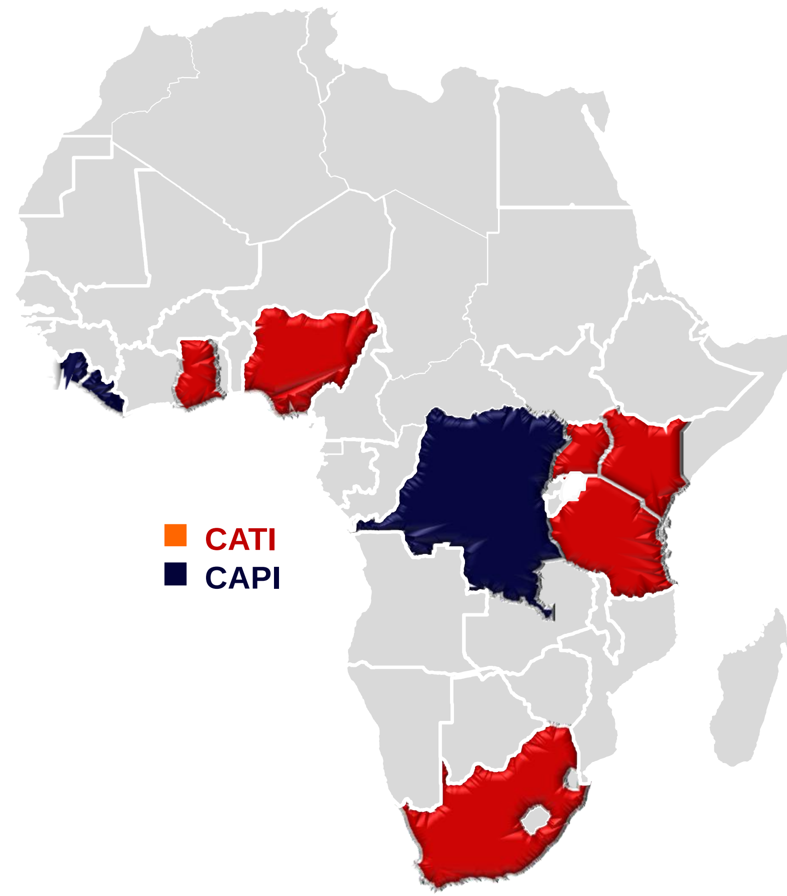


Maryann Murugi
Finance & General Manager
(Infinite Insight, Kenya)

Maryann has over eight years experience in financial monitoring and analysis of financial reports.
She is a certified Public accountant and has a Bachelor's of Commerce degree from University of Nairobi. She is also a member of ICPAK and MSRA

Syndicated Services

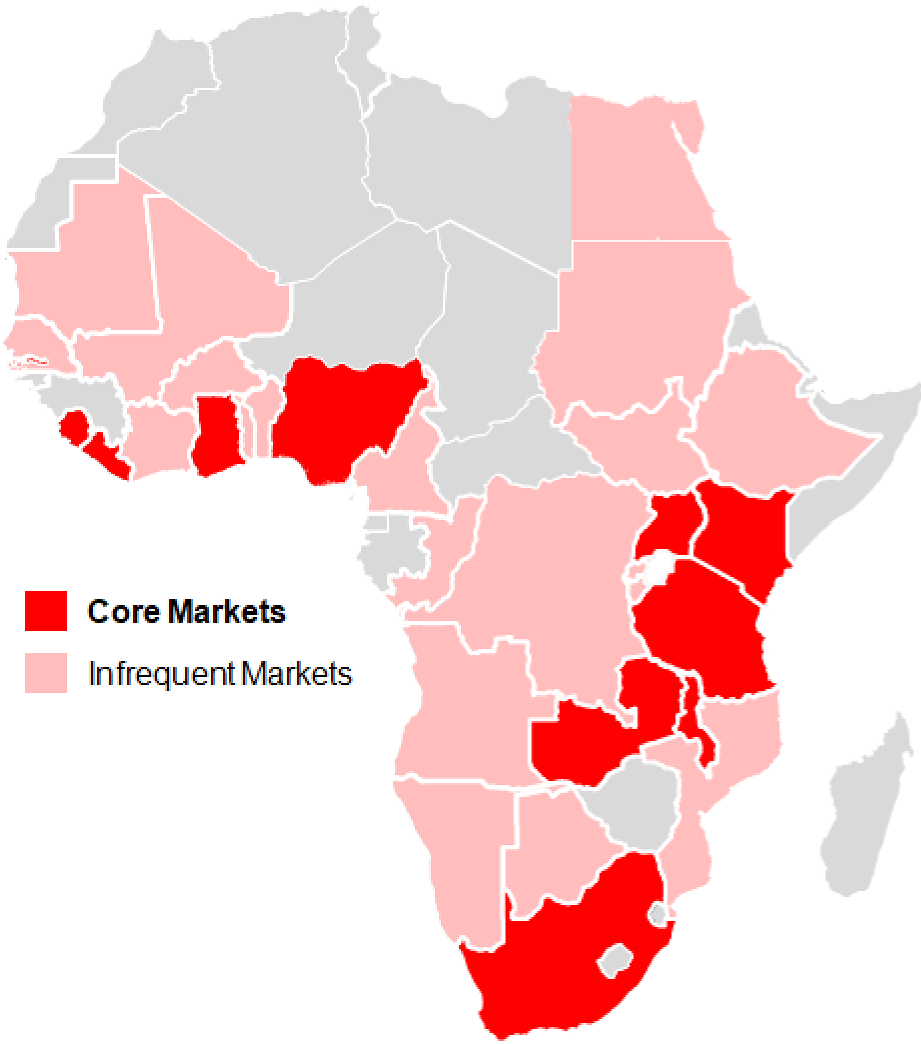
- We have launched a series of quantitative and qualitative syndicated services:
  - **Omnibus and Taxis:**
    - **CATI:** Kenya, Tanzania, Uganda, Nigeria, Ghana, and South Africa
    - **CAPI:** Democratic Republic of Congo (DRC), Liberia, and Sierra Leone
  - **Focus Groups and Online Communities:**
    - Initially available in Kenya, Nigeria, and South Africa



- The brochure, including rate cards, can be downloaded at:

https://infiniteinsight.net/II&CI_Syndicated_Research_Brochure.pdf

Ad-Hoc Coverage & Clients



Research Ethics & Data Privacy

- Across all markets in which we operate, we fully comply with the ICC/ESOMAR Code of Practice, the MSRA Code of Ethics, and the GDPR.
- In addition, in Kenya, Infinite Insight is registered with the Office of the Data Protection Commissioner (ODPC) as a *Data Controller* and a *Data Processor*.
- View our Data Privacy Statement here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