



RESEARCH
INTERNATIONAL



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Project NMS Report

(Job No MT-08)

Prepared: For WISHH

September, 2008

How was the study carried out

Consumer eligibility

- Male/female 18-64 years in ABCDE social class
- Random selection to measure penetration
- Eligibility dependent on Soy consumption

- Lagos, representing the South West
- Enugu, representing the East
- Abuja, representing the North central
- Kano, representing the North
- 100 sample size in each location

Coverage & Sample size

Approach & Achievement

- Quantitative face to face interviews/ random sampling
- Screening and basic usage behaviour

Fieldwork was carried out from 26th June – 8th July, 2008.

Sample Breakdown

<u>LOCATION</u>	<u>SAMPLE ACHIEVEMENT</u>
Lagos	100
Abuja	100
Enugu	100
Kano	100
TOTAL	400
<u>AGE</u>	<u>SAMPLE ACHIEVEMENT</u>
18 – 24	102
25 – 30	123
31 – 40	125
41 - 50	50
TOTAL	400

<u>GENDER</u>	<u>SAMPLE ACHIEVEMENT</u>
Male	208
Female	192
TOTAL	400
<u>SEC</u>	<u>SAMPLE ACHIEVEMENT</u>
AB	42
C1	112
C2	166
DE	80
TOTAL	400



Findings

Which type of food/drink are households consuming?

Food:

- ⊙ Mostly carbohydrates, with rice and Yam topping the list
- ⊙ Protein giving foods such as beans, meat, and fish.

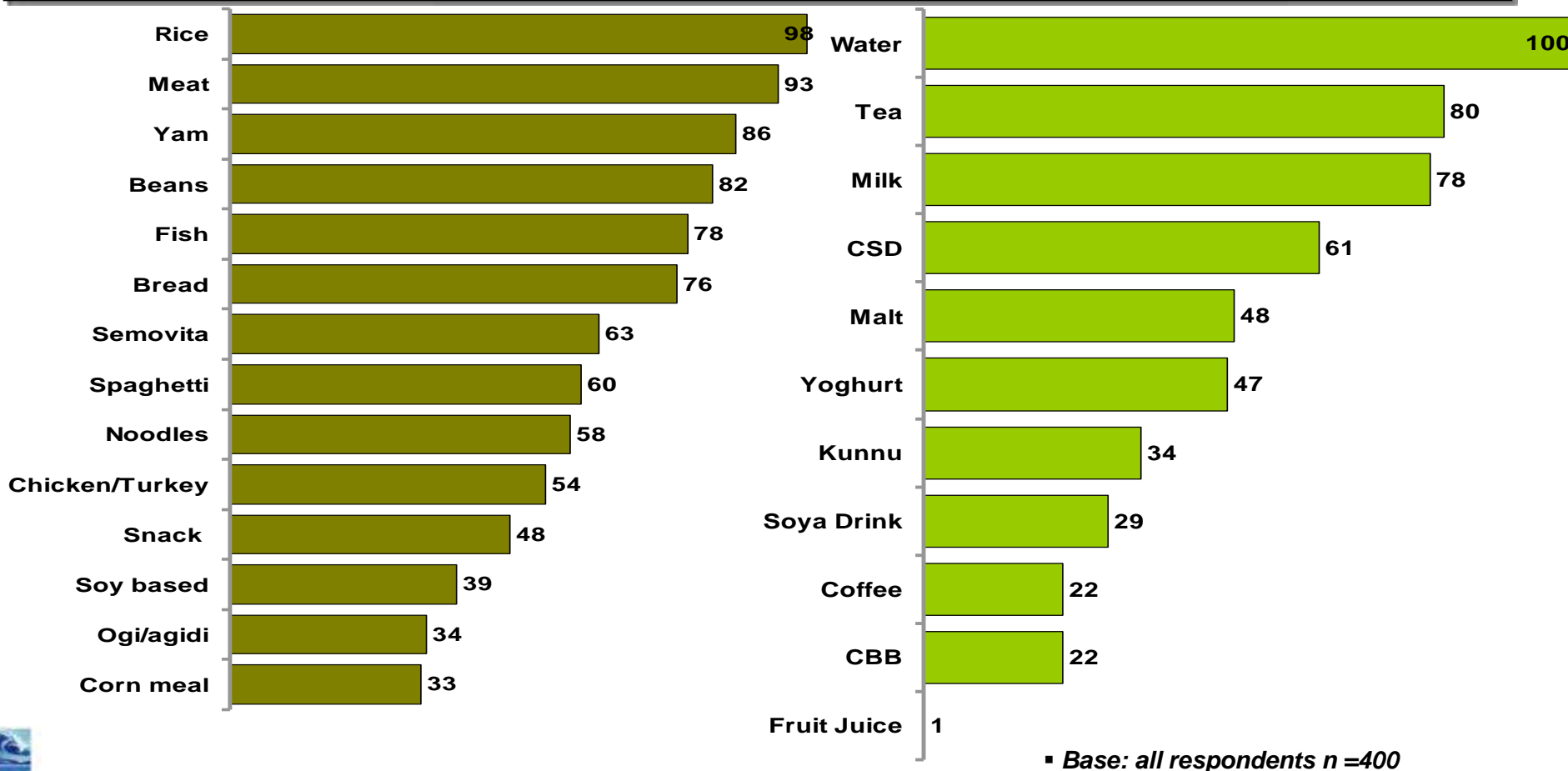
Drinks:

- ⊙ Expectedly, water came top and cuts across
- ⊙ Tea, Milk and CSD/Minerals tops the list of processed drink consumed by Nigerians.



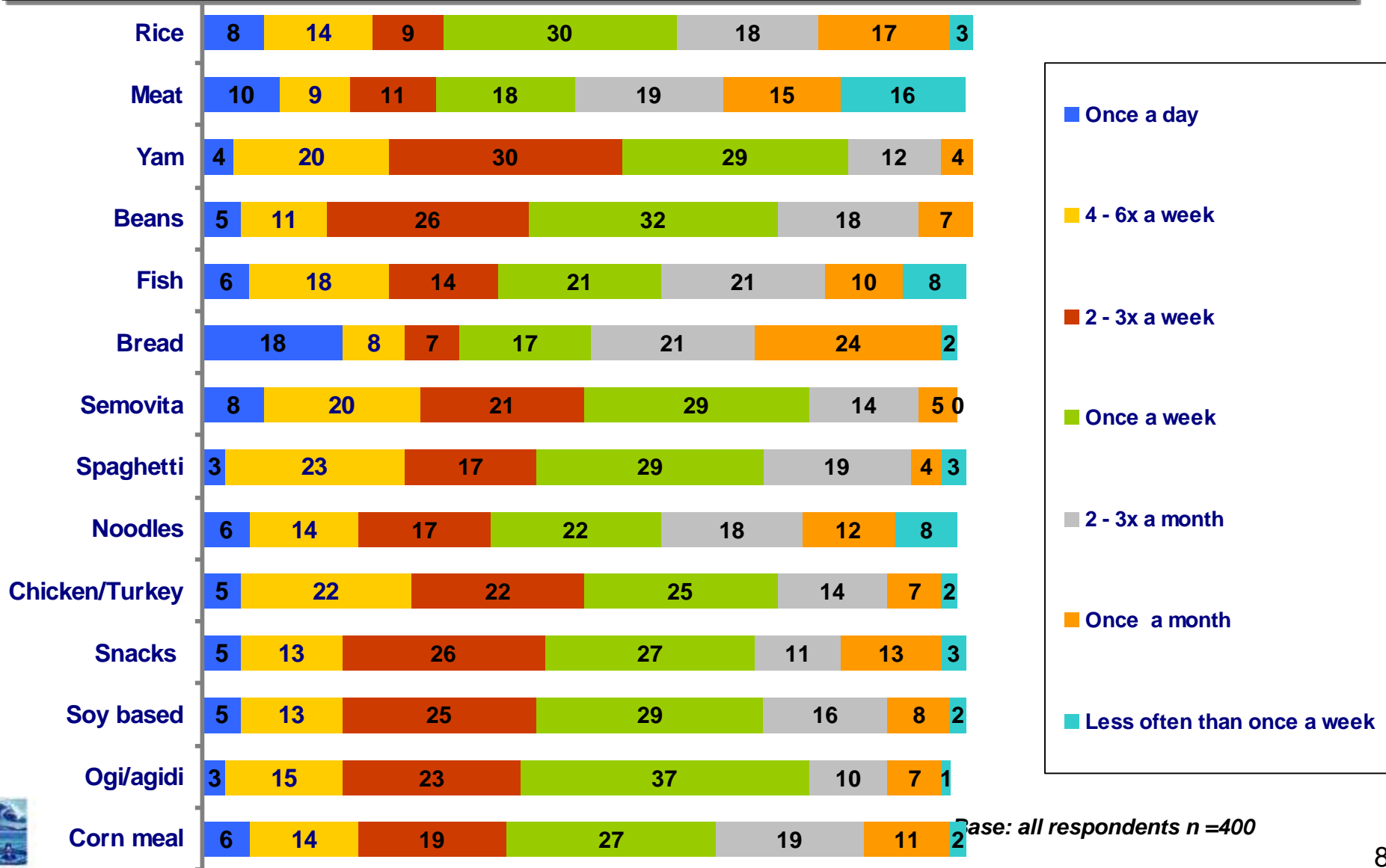
Food & Drink Repertoire

- Below are the food & drinks repertoire of Nigerians. Result showed high consumption of food item rich in carbohydrate & protein (Rice, meat, Yam, beans & fish). Consumption of soy based food is low.
- Aside water, result showed high consumption of processed drink like Tea, milk & CSD. Lower proportion of people are observed to consume Soy.



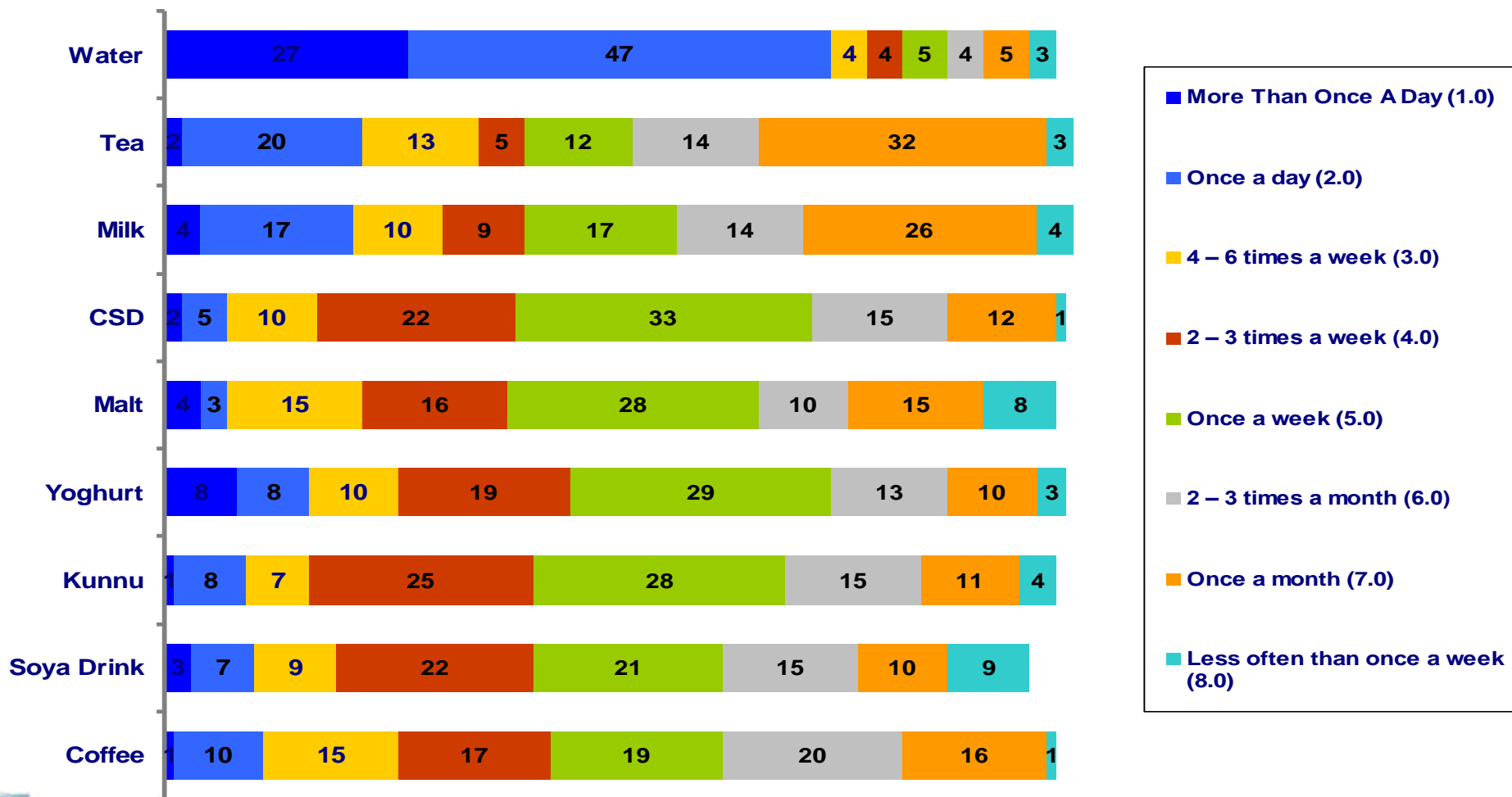
Frequency of consumption - Food

• High daily consumption of bread, meat & Rice. Frequency of consuming other food item is mainly between 2-3x a week to once a week



Frequency of consumption - Drinks

• Apart from water, milk, Tea & yoghurt recorded the highest daily consumption. Consumption of Soya drink as well as most other drinks is mainly between 2-3 times a week to once a week.

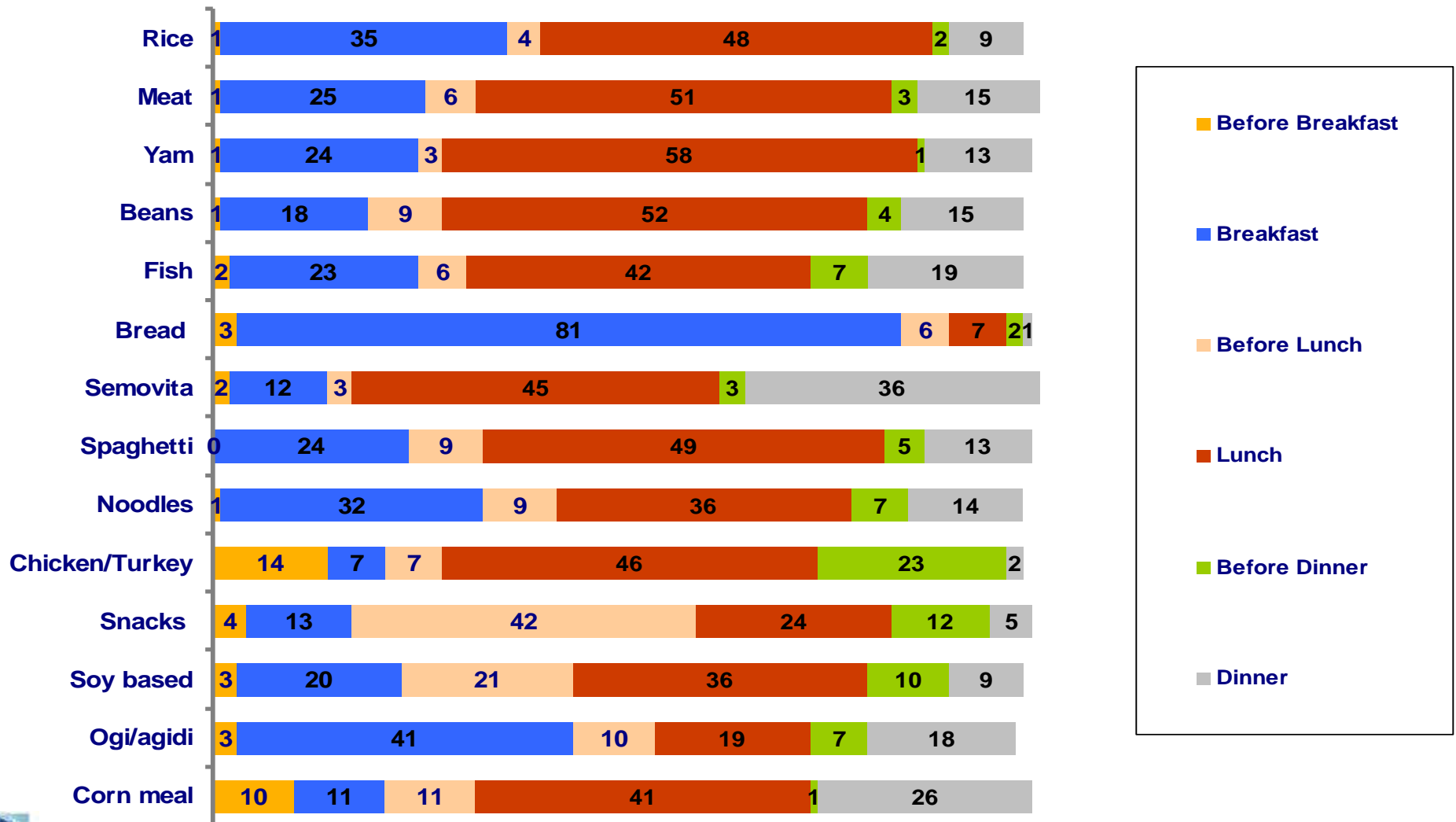


▪ Base: all respondents n =400



Time of consumption - Food

• Though most food item is taken at normal meal time, result show high claimed consumption of snacks & soy based foods before lunch.

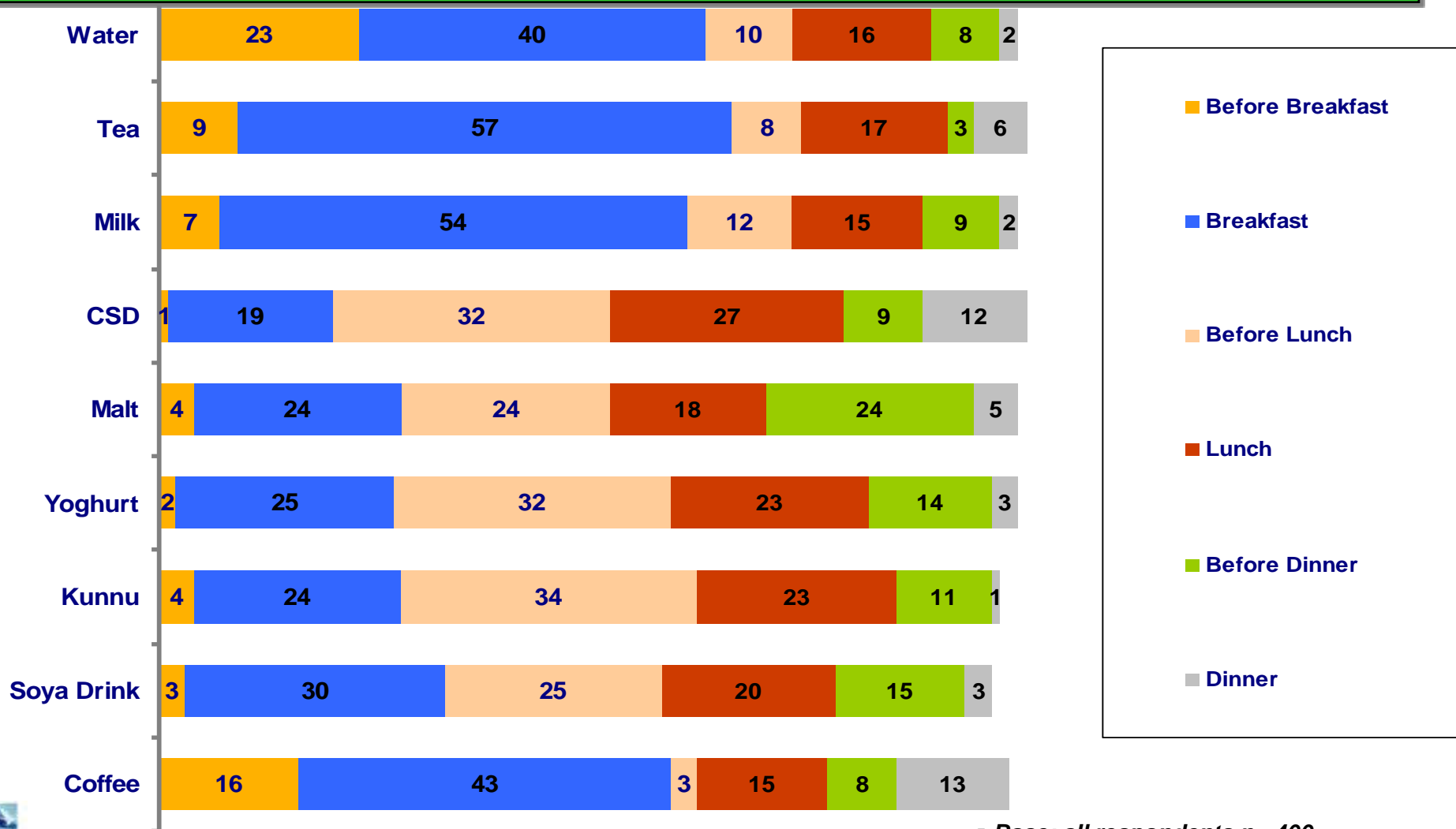


▪ Base: all respondents n =400



Time of consumption - Drinks

• High consumption of drinks before breakfast/at breakfast generally. However, result also showed high consumption of CSD, Malt , yoghurt & Kunnu before lunch – same for Soya drink

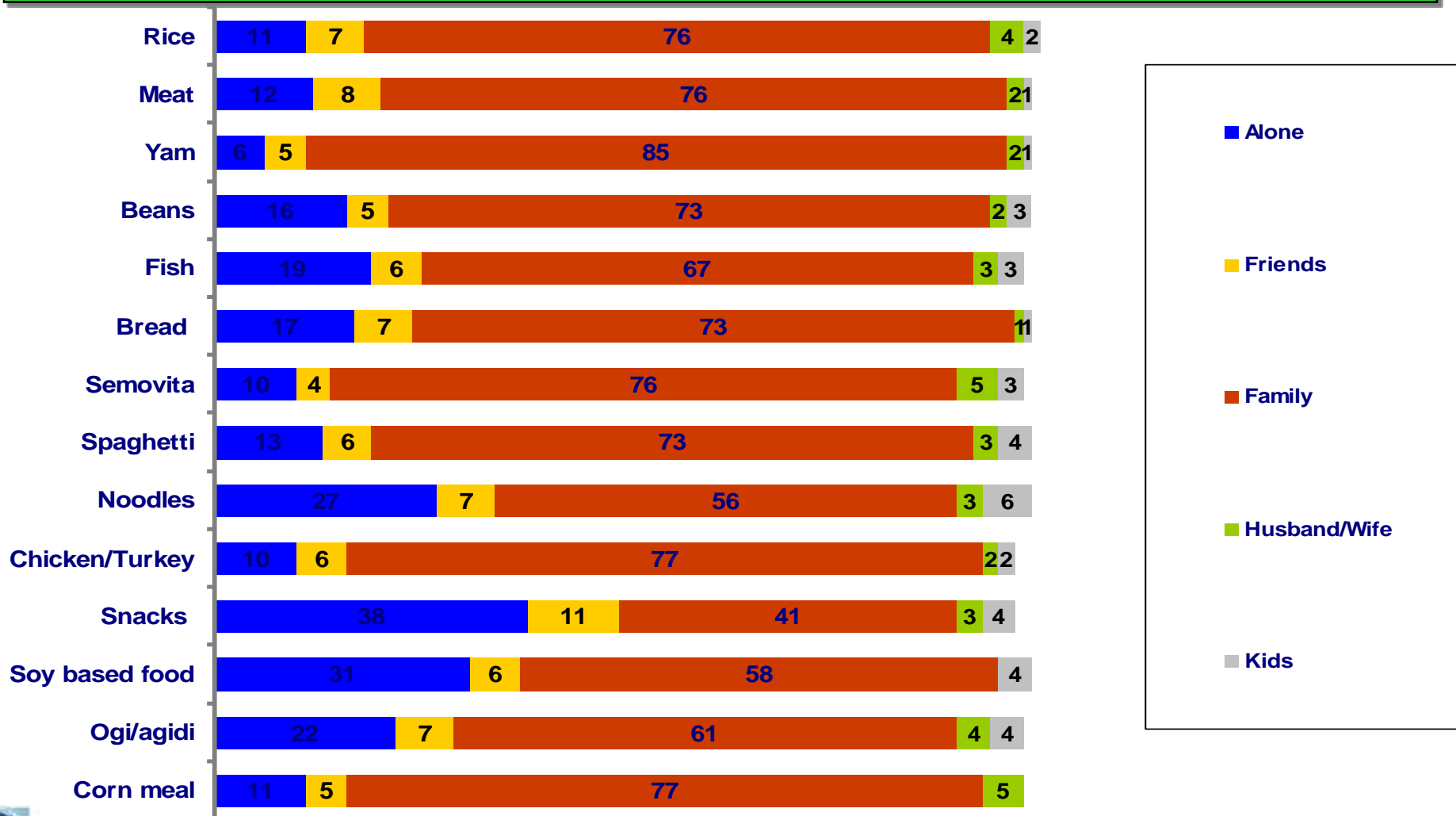


▪ Base: all respondents n =400



Food consumption setting

- While food consumption mainly occurs in a family setting, proportion of people that eat alone is also significant especially when taking food items like snacks, soy based food & noodles.

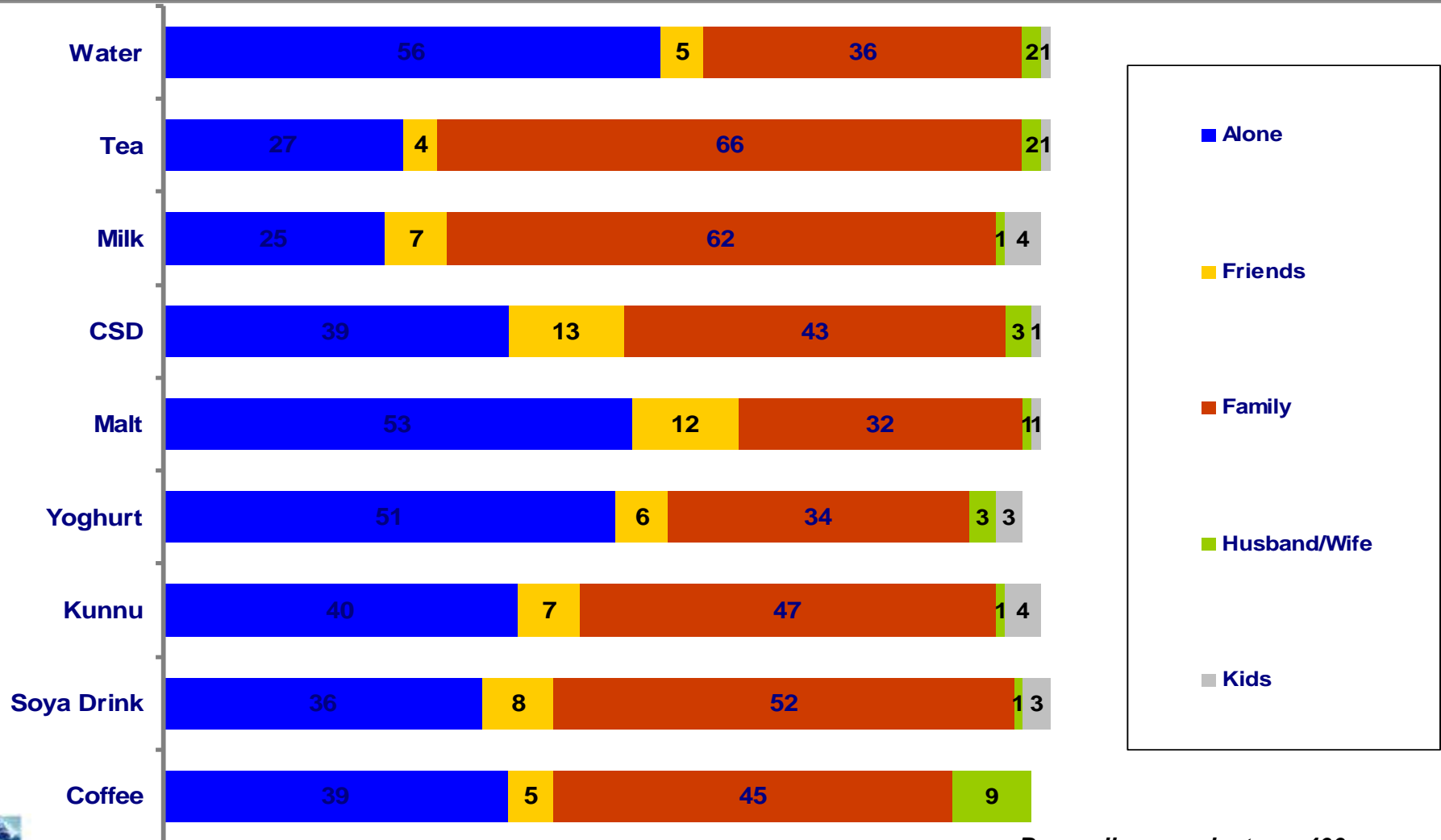


▪ Base: all respondents n =400



Drink consumption setting

• Environment where different drinks are consumed varies; while consumption of drinks like Tea , milk, Soy, kunnu & Coffee frequently occurs in a family setting, consumption of CSD, Malt & Yoghurt mainly occur with no one present



▪ Base: all respondents n =400



Do Nigerians know Soy and is it amongst the food/drink they consume?

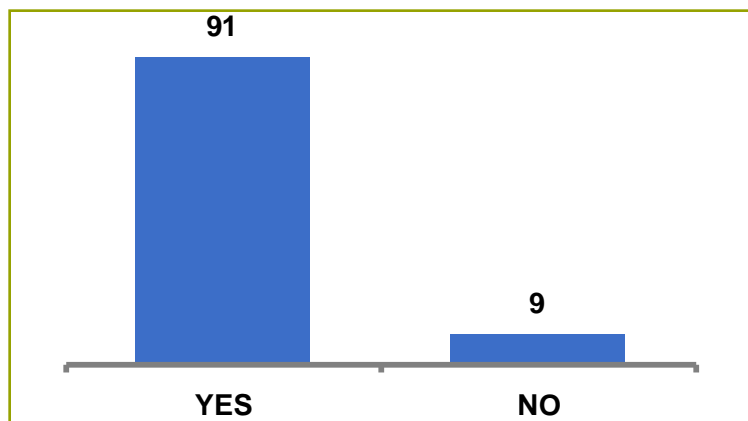
- ◎ Very high awareness for the product, at least 9 out of every 10 is aware.
 - ◎ Amongst those aware, Trial/Consumption is significant,.
- ◎ Usage cuts across gender. However, the product seem more popular amongst the middle and lower class consumers
- ◎ Also, more popular in the North, Kano and Abuja and Enugu (East) as compared to Lagos.
- ◎ Usage can be either as an additive to food and drink but mostly as a stand alone meal
- ◎ Consumption is mostly in Solid and liquid traditional food/drink form as against powder



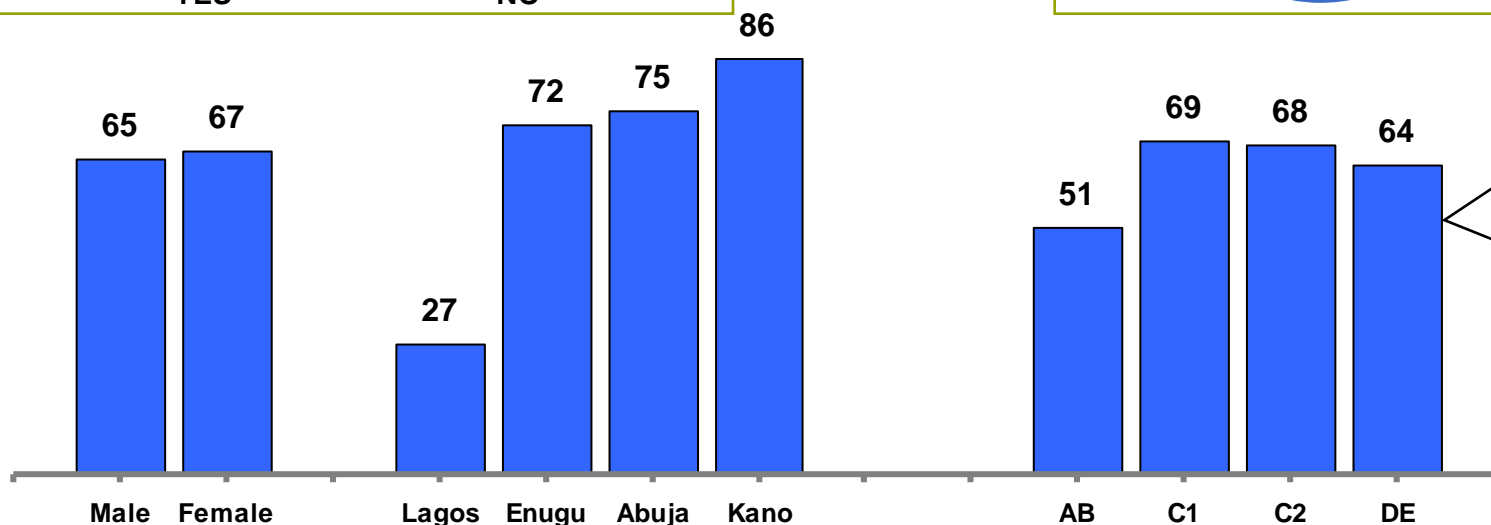
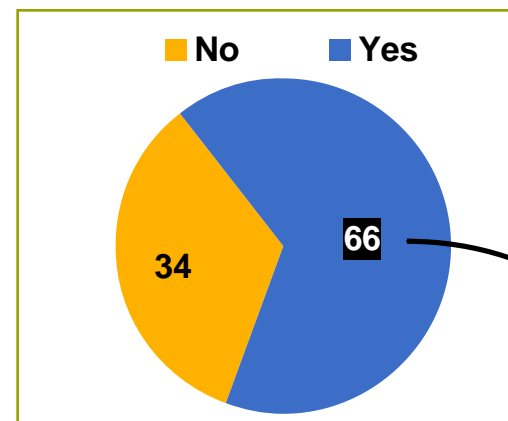
Awareness & Penetration of Soy

- Result showed high awareness and consumption of Soy. Amongst those aware, consumption is observed to be higher amongst middle & lower income bracket (C1C2DE) than the upper SEC.
- Consumption was also observed to be higher in the northern regions (especially Kano) than the Southern regions

Aware of Soy? (n = 400)



Consume Soy? (n = 365)



Consumption of soy

- Across regions, consumption pattern is observed to vary, while soy is mainly used as an additive to other foods & drinks in the Lagos & Abuja. Consumers in Kano takes it mainly as a stand alone meal

	Total	Lagos	Abuja	Enugu	Kano
Total =	240 %	23 %	72 %	62 %	83 %
Additive/ingredients to other food items	25	57	29	31	7
Additive/ingredients to other drink items	24	13	63	13	1
Stand alone meal	50	30	8	55	89

	Total
Base =	121 %
Solid	58
Liquid	40
Powder	2

▪ **Local/Traditional foods = 75%**

▪ **Beverages = 40%**

▪ **Dairy = 36%**

▪ **Snacks = 17%**

▪ **Baked = 16%**

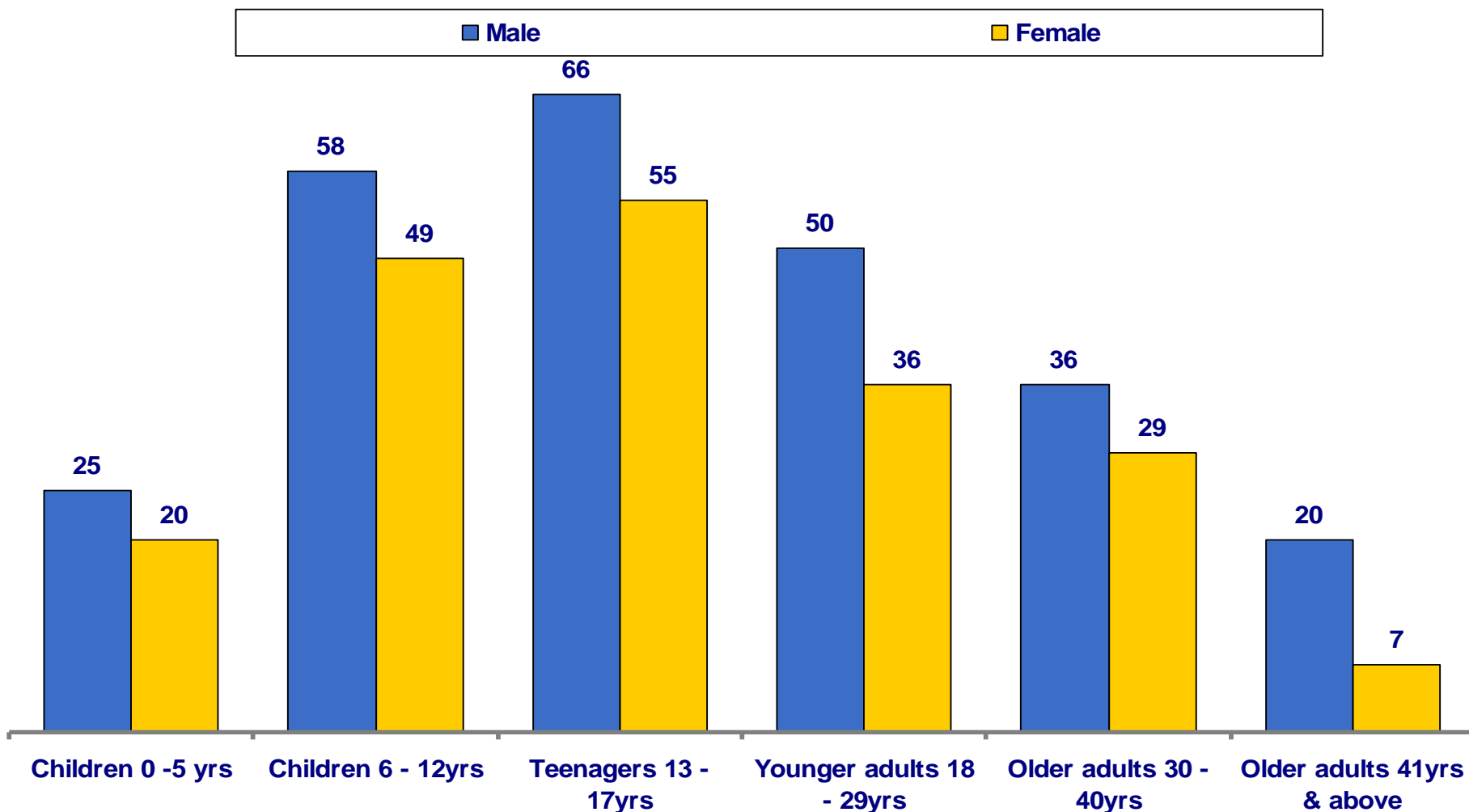
▪ **Meat = 6%**

	Total
Total	240 %
Daily	25
Weekly	38
Less often than a week	28
Monthly	7

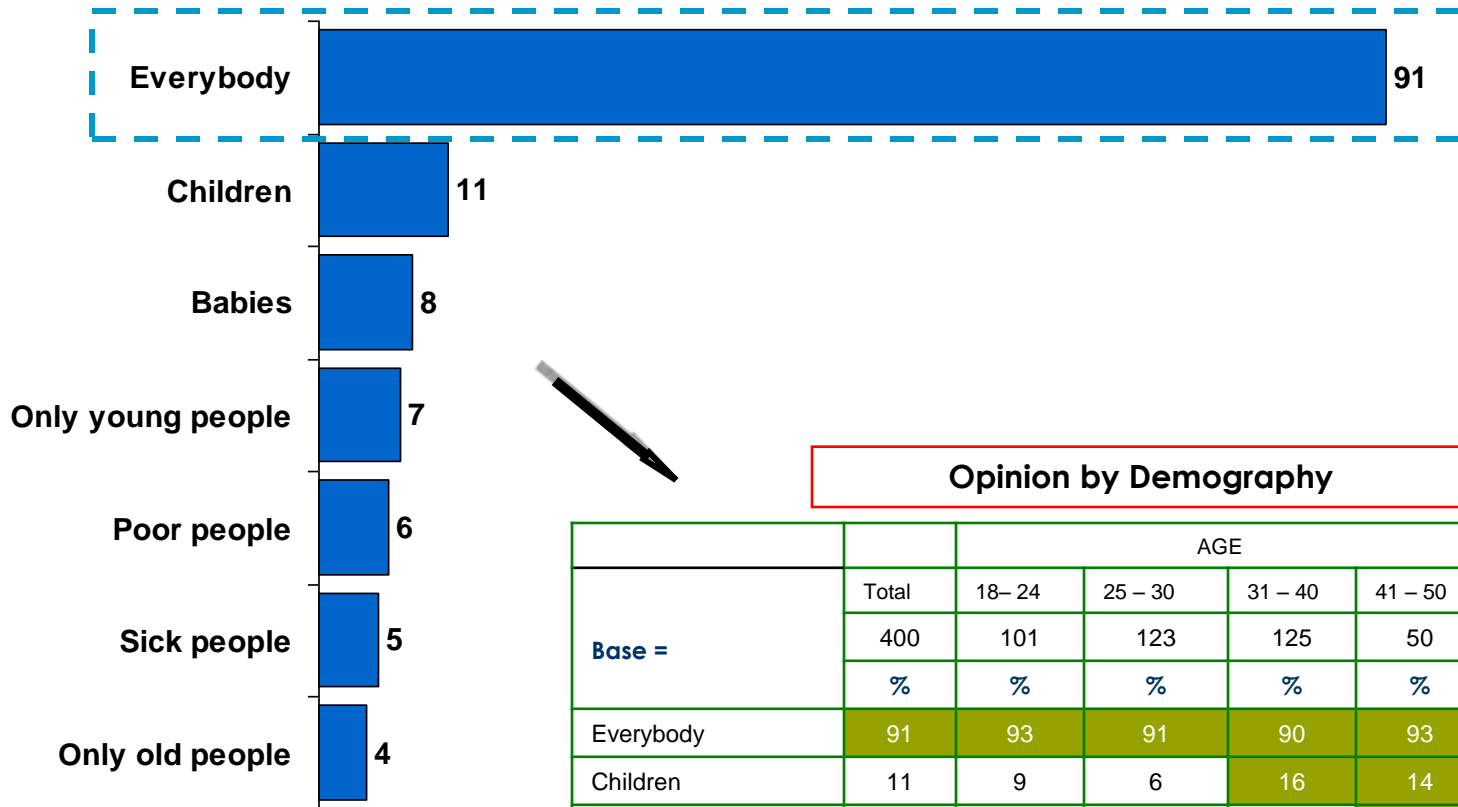
- For most soy consumers, frequency of consumption is mainly weekly.

Who mostly consume soy in household

- Result indicates higher level of Soy consumption amongst male members of household than female, most especially amongst teenagers & older children.



Who should use soy?



Opinion by Demography

	Total	AGE				SEC			
		18- 24	25 - 30	31 - 40	41 - 50	AB	C1	C2	DE
Base =	400	101	123	125	50	42	111	166	79
	%	%	%	%	%	%	%	%	%
Everybody	91	93	91	90	93	90	94	90	93
Children	11	9	6	16	14	5	11	13	7
Babies	8	3	9	9	14	5	2	12	7
Only young people	7	4	6	11	3	5	5	9	4
Rich people	2	1	4	1	0	0	0	2	4
Poor people	6	3	7	7	3	0	5	7	4
Sick people	5	3	4	6	7	0	3	8	2
Only old people	4	0	4	7	3	0	3	7	0

• Soy considered as good for everyone – opinion merely emphasizing its perceived nutritional benefit

Length of Soy Consumption

- Majority of users have been consuming soy for about 5 years. Notably while majority of users in the northern states have been consuming Soy up to 5 years, length of consumption in Lagos is observed to be less as majority seem to have only started consuming the product for about 2 years

Base =	Total	LAGOS	ABUJA	ENUGU	KANO	MALE	eaFEMALE	AB	C1	C2	DE
	240 %	23 %	72 %	62 %	83 %	122 %	118 %	20 %	68 %	105 %	47 %
6 month or less	1	0	0	3	1	2	1	0	0	3	0
6 month to 1 year	5	13	4	6	1	6	3	10	3	5	4
1 year to 2 years	12	52	14	6	2	9	14	0	13	14	7
2 years to 3 years	13	13	18	18	5	16	10	5	13	14	11
3 years to 5 years	18	4	24	16	17	21	14	15	16	17	22
5 years +	51	13	40	49	72	45	57	65	53	47	53

Food types fortified with soy consumed across location

• Below are the soy fortified foods mainly consumed across the regions.....

Base =	LAGOS		
	23		
	%		
	Yes	No	Don't know
Baked product	13	13	13
Meat product	0	78	17
Dairy product	61	30	4
Snack product	39	57	0
Beverages	30	65	0
Local/Traditional food	43	52	4

Base =	ABUJA		
	72		
	%		
	Yes	No	Don't know
Baked product	25	61	14
Meat product	7	71	22
Dairy product	64	11	25
Snack product	15	69	15
Beverages	64	29	7
Local/Traditional food	92	8	0

Base =	Enugu		
	62		
	%		
	Yes	No	Don't know
Baked product	21	32	45
Meat product	15	44	40
Dairy product	32	29	37
Snack product	35	23	40
Beverages	47	21	31
Local/Traditional food	31	19	48

Base =	Kano		
	83		
	%		
	Yes	No	Don't know
Baked product	5	59	35
Meat product	0	63	36
Dairy product	11	60	28
Snack product	1	66	31
Beverages	17	48	34
Local/Traditional food	98	1	1

What are Soy consumers saying about the product?

- ⊙ Perceived nutritional benefits is the major driver for consumption.
- ⊙ Other claimed benefits for the product includes:
 - ✓ *Being cheaper/more affordable (not surprising as most consumption is traditional/local consumption)*
 - ✓ *Being a good alternative to other major food items*
 - ✓ *Perceived nutritional benefits implies medicinal value.*
- ⊙ The benefits derived also rubbed off on the key likes expressed for the product:
 - ⊙ Nutritional benefit top the list
- ⊙ Major criticism expressed centers around unpleasant aroma/flavour and availability.



Factors driving consumption of food fortified with soy

-hence most food fortified with soy are mainly adjudged to be a good & cheaper source of protein & nutrition

	Local/Traditional food	Beverages	Dairy	Snack foods	Baked	Meat
Base	175	96	89	43	38	14
	%	%	%	%	%	%
It is high in protein	19	10	12	14	8	21
It is very nutritious	18	24	25	14	18	14
It is very cheap	14	2	8	12	11	7
It gives energy	9	2	2	-	5	-
It makes me healthy	8	6	8	2	-	-
It is easily available	8	-	2	5	-	-
It has a pleasant taste	5	7	6	9	11	14
It contain vitamins	5	6	2	-	5	-
It has a unique taste	2	4	2	5	3	-
It stay for long in the stomach	-	-	-	2	3	7
It is very satisfying	2	1	2	-	3	-
It serve as an alternative for powder milk and food	-	4	1	5	3	-
It is delicious	2	1	-	7	3	-
It add value to the money	-	-	1	2	3	-

Likes/Dislikes about soy/soy based products

- As expected, main factor for like is anchored on soy nutritional value. Main dislike centred on perceived unpleasant aroma/flavour of the products & the fact that it is not easily available

LIKES	TOTAL
It is highly nutritional	42
Has high protein	27
Has natural taste & flavour	16
It is rich in vitamin	10
It is not expensive	9
It is highly refreshing	6
It is medicinal	5
It gives energy	5
It is readily available	4
It serves as an alternative for food	2

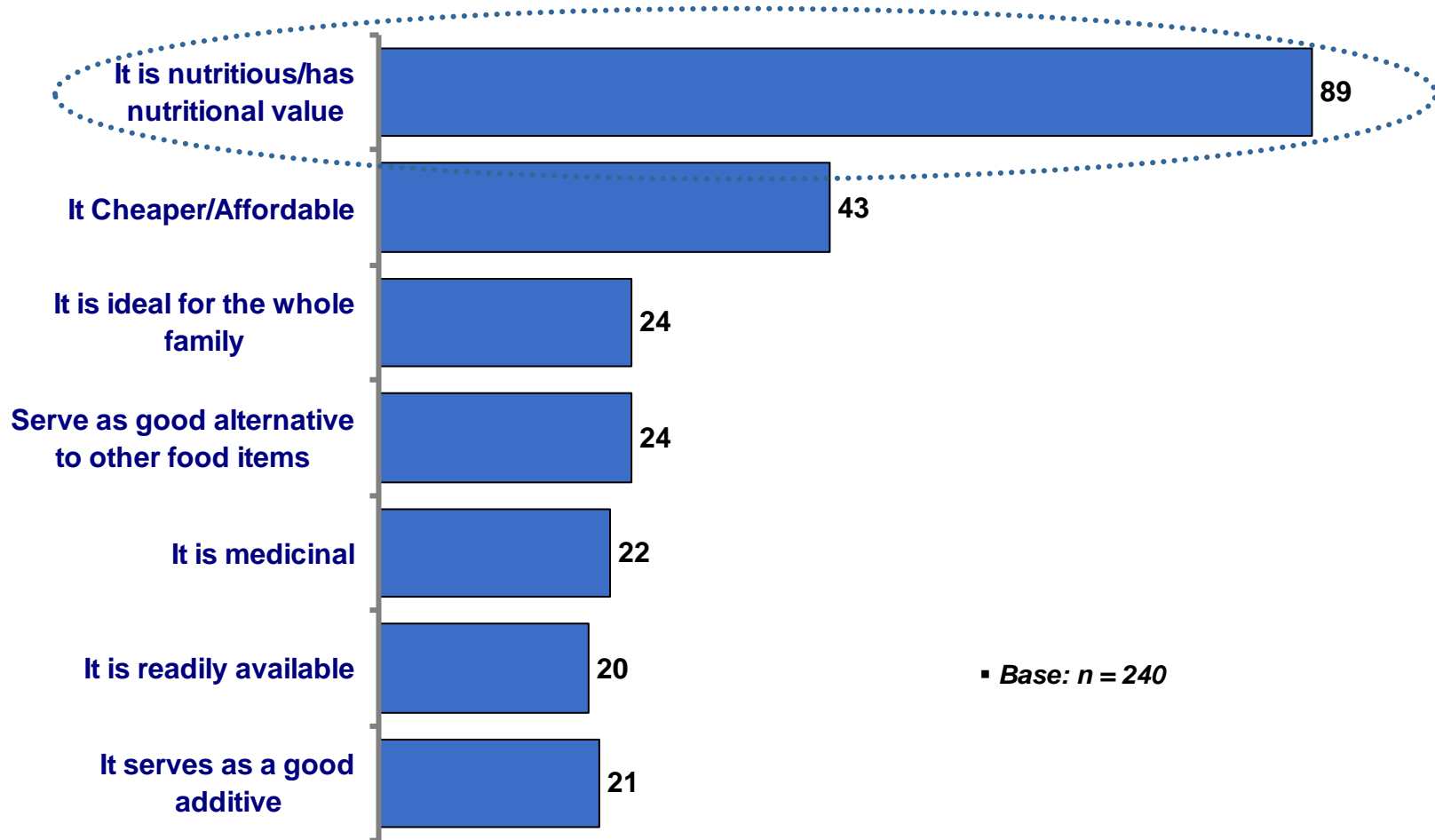
DISLIKES	TOTAL
Not easily available	9
Poor flavour/aroma	9
Preparation takes long	6
It is too expensive	3
The local type has an unpleasant taste	2
It does not stay long in the stomach	1

▪ Base: n = 240



Benefits derived from consumption of soy

- Perceived nutritional benefit is the main driver for soy consumption. At lower level, a good proportion of consumers also considered Soy as cheap/affordable and serve as a good alternative to other food items.



Future disposition

- High future usage intent for soy, driven mainly by its perception as a rich source of protein/healthy for the body

	Total	Male	Female	Lagos	Abuja	Enugu	Kano
Base =	240 %	122 %	118 %	23 %	72 %	62 %	83 %
Unlikely/Very unlikely (2.0/1.0)	1	2	0	0	1	0	1
Can't say/Not sure (3.0)	1	1	2	0	3	2	0
Likely (4.0)	26	28	25	22	32	23	25
Very likely (5.0)	70	68	73	74	64	74	72

Why?

<u>Reasons</u>	Total
It is rich in protein	43
It is healthy for the body	43
Don't know how the taste will be	6
It is not readily available in the market	6

Source of soy purchase

- Source of purchase is mainly at the open market, but with a significant proportion of users also buying from the neighbourhood shops & the hawkers
- Result indicates high contention with price as major deciding factor in the eventual purchase of soy.

Base =	Total	LAGOS	ABUJA	ENUGU	KANO
	240 %	23 %	72 %	62 %	83 %
Large Supermarket/hypermarket	4	4	4	6	2
Small Supermarket	10	22	10	19	1
Shopping Mall	3	0	6	3	0
Open-market	33	57	29	50	16
Neighborhood shop	23	9	44	3	24
Restaurants/Hotels	1	0	1	2	0
Hawker/Traffic lights	20	0	4	13	43
Health centers	1	4	0	2	0

Influence of price on purchase

	Total	Lagos	Abuja	Enugu	Kano	Male	Female	AB	C1	C2	DE
Very important	51	31	57	45	77	49	54	33	39	64	47
Somewhat important	27	54	38	16	8	29	24	33	35	18	33
Neither nor	5	8	5	6	0	5	5	17	4	0	13
Not important	13	8	0	23	15	15	11	0	22	12	7
Not at all important	4	0	0	10	0	2	5	17	0	6	0
Mean score	4.09	4.08	4.52	3.65	4.46	4.07	4.11	3.67	3.91	4.21	4.20

Attributes statements about Soy – Positive scores

<u>STATEMENTS</u>	<u>STRONGLY AGREE</u>	<u>AGREE</u>	<u>MEAN SCORES</u>
Highly nutritious	40	20	4.53
Has appealing taste	28	29	4.31
A product one can trust	26	30	4.28
An innovative product	24	30	4.22
A good source of protein for me and my household	32	27	4.40
Has an unpleasant flavour	11	10	2.69
An original unique product	18	33	4.04
A product that shares my interest	21	33	4.13
A product worth paying more for	11	26	3.46
A product worth the price	14	33	3.78
Always with an appealing colour	16	35	3.96
Really different from other products	24	30	4.21
Pleasure to consume	23	33	4.17
Not acceptable to my religion	4	6	1.93
A product most of my friends consume	15	30	3.80
Distinctive taste	19	36	4.14
Easily available where I shop	22	32	4.14
For someone like me	25	30	4.22
For the young/children	23	27	3.98
Not acceptable to my culture	5	2	1.65



 1 Strongly disagree Scale: 5 Strongly agree



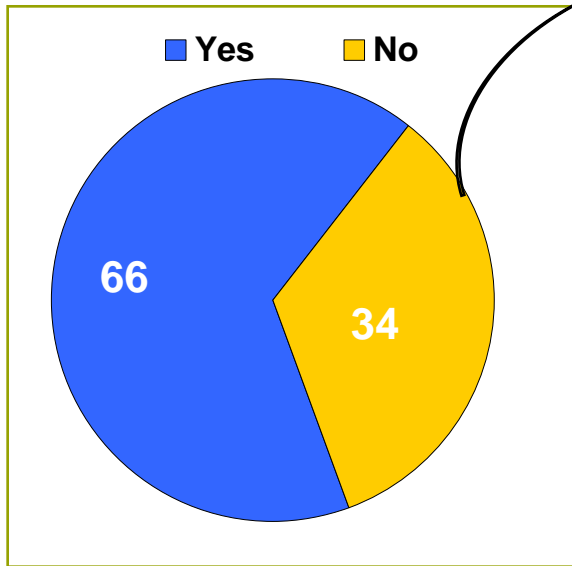
Suggestions for improving the usage of Soy

- Main suggestion for improvement centred on creating more product awareness (i.e benefits), affordability and better & more hygienic processing of product.

<u>Suggestions</u>	
Base	240 %
More advert should be done	48
Moderate/ affordable price	17
Soya powder should be hygienically treated with care	13
It should always be available	13
They should improve on the taste	5
Improve on their flavour	4
They should encourage it among farmers	2
They should make it in various types	2
The should increase the quantity	2
The nutrients should be improved	2

Amongst non-users

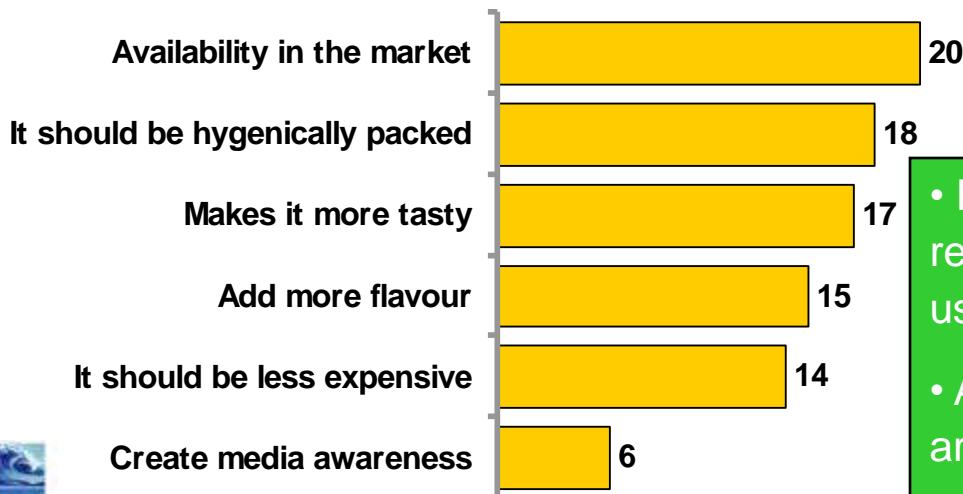
Consume Soy? (n = 365)



Why do you not consume soy? (n = 125)



What can make you consume? (n = 125)



- Product scacity/non availability is the major reason adduced by non- consumers for not using Soy.
- At a lower level, unpleasant taste & flavour are adduced as other reasons mitigating against product consumption