



The State of Sustainability

A consumer perspective in Africa

January 2022



1 Climate Awareness in Africa

- Climate awareness is high amongst African consumers
- African consumers are worried about their future when it comes to climate change, global warming and planet protection

2 Sustainability as a purchase driver

- Africa consumers do care about sustainability when making purchase decisions
- Over 96% of respondents identify one or several sustainability factors as important when buying products

3 Overall Sustainability

- According to African consumers, the Sanitation and Waste Management Industry is doing a poor job when it comes to overall sustainability.
- Bank & Financial Institutions are doing a better job when it comes to overall sustainability.
- Across countries, Sanitation and Waste Management Industries are doing a poor job in Kenya and South Africa. The Government in Ghana.

4 Ethical Business

- Sanitation and Waste Management Industries are doing a poor job ethically.
- Bank & Financial Institutions and Telecommunications are doing a better job when it comes to ethical business.

5 Social Sustainability

- According to consumers, Government and Sanitation and Waste Management Industries are doing a poor job when it comes to social sustainability.
- Bank & Financial Institutions and Telecommunications are doing a better job when it comes to social sustainability.

6 Environmental Sustainability

- Industrial Manufacturers. Sanitation & Waste Management Industries and Mining/Oil & Gas Companies are doing a poor job in as far as environmental sustainability is concerned.
- Farmers are doing a better job compared to other industries when it comes to environmental sustainability

CONSUMER INTELLIGENCE

HIGH FREQUENCY RESEARCH MADE FOR AFRICA



Data as scale

Access to over 450+ datasets within 20+ countries hub
Navigate index and survey-based data to unlock insights
Client can leverage the data and insights for program planning, execution and evaluation

Intelligence at your fingertips

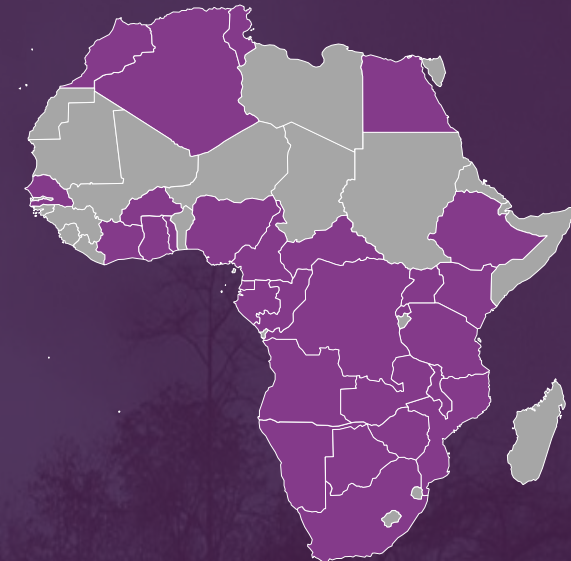
Access to the Kasi Hub with proprietary datasets (from 2016)
All features activated for the first year (Upload, Data Visualization, Sharing/Collaboration)
Access to our analysts to mine data for pitch or for projects

Rapid surveys

Deep dives included semi-annual or quarterly
Survey design, scripting, fieldwork included
PowerPoint presentation with actionable insights

Decision Intelligence Program

Free Demo and Training
Access to our online webinar, training and newsletters
On demand access to workshop for your team



Conducting monthly surveys in:

- Angola
- Algeria
- Botswana
- Cameroon
- Congo
- DRC
- Egypt
- Ethiopia
- Ghana
- Ivory
- Kenya
- Namibia
- Nigeria
- Morocco
- Mozambique
- Senegal
- South Africa
- Tanzania
- Tunisia
- Uganda
- Zambia
- Zimbabwe

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Who we are

We don't just provide data – we empower decisions

We are Africa's leading decision intelligence company; our story is a testament to African innovation and resilience. Born, funded, led, and supported by Africans, we are here to inspire you to achieve the impossible.

Our approach combines proprietary high-frequency primary data with applied artificial intelligence, providing you with unparalleled insights into what Africans think, do, and what lies ahead.

With access to 609 million people across the continent, our proprietary platform facilitates **over 12,000** monthly interviews in **20+ of Africa's largest economies**. Additionally, we undertake custom projects in almost every corner of Africa, giving you a comprehensive view of this diverse landscape.

LEARN MORE

Africa's Leading Decision Intelligence Platform

We reveal an African market where you can win and inspire with confidence

Get in touch



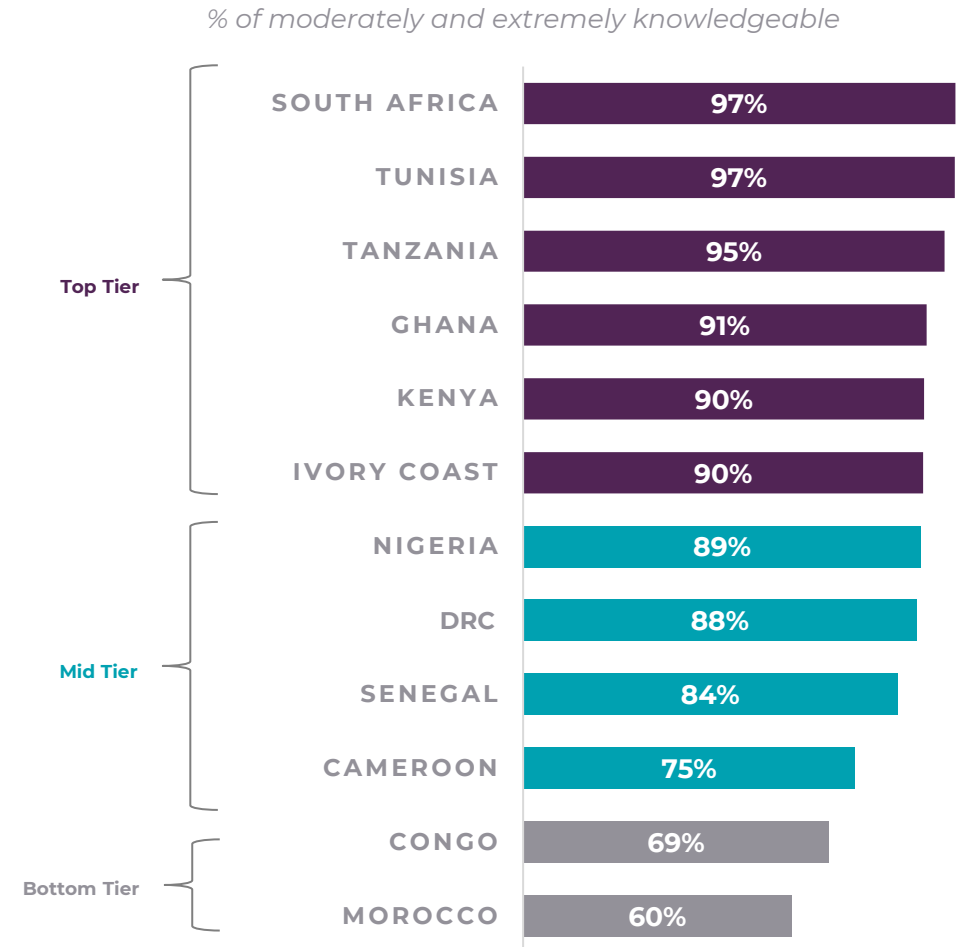
Climate Awareness in Africa

Africans are well-informed on issues of climate

When it comes to climate awareness, majority of the respondents were well-informed on the issues that affect the environment. These included climate change, global warming and planet protection.

Across the 12 African markets assessed, the awareness is quite high. However, there were different tiers realized based on the awareness scores

- **Top tier** -These are countries that had scores above 90%. These included Tunisia-97%, Tanzania- 95%, South Africa- 97%, Kenya - 90%, Ivory Coast-90% and Ghana-91%.
- **Mid tier** - These are countries that had awareness scores of 75% and above. These included Senegal -84%, Nigeria-89%, DRC-88% and Cameroon 75%.
- **Bottom tier** - tier-These are countries that had awareness scores of 60% and above. These included Morocco-60% and Congo-69%



Q18. How much would you say you know about environmental issues, such as, climate change, global warming, and protecting the planet.

Rating Product Sustainability

Africa consumers do care about sustainability when making purchase decisions

96%

Over 96% of respondents identify one or several sustainability factors when making purchase decision. When asked about sustainability factors impacting their purchase decision, they care about what's in the products (natural ingredients, organic ingredients) but also how the products are made (not tested on animals).

When looking at Ghana, Ivory Coast, Kenya, Morocco and South Africa, there is a consensus on the top 2 sustainability factors (Natural or Organic ingredients) but beyond that differences emerge:

- **Ivorians and Ghanaians appreciate products made from their own country.** Whereas the others are rating products made from Africa 5 and 6, the two countries are rating them at 1 and 2 respectively.
- **Genetically modified products are bad news in Morocco.** Moroccans are rating products without GMO as 1. This means that the consumer market dislikes genetically modified products.

SUSTAINABILITY FACTORS	OVERALL	GHANA	IVORY COAST	KENYA	MOROCCO	SOUTH AFRICA
Made with natural ingredient.	1	1	2	1	2	1
Organic/ made with organic ingredients	2	4	3	2	3	2
Not tested on animals	3	5	5	6	4	3
No-GMO	4	6	4	4	1	4
Products made in an environmentally friendly manner	5	3	6	3	5	5
Products that are made in Africa /made in your country	6	2	1	5	6	6

Q20. Product/Food sustainability means product/food that is safe and healthy for people and for the environment. When you are making a decision about which food or products to buy, which of the following sustainability factors influences which brands you buy

How did we look at sustainability?

Three lenses – Environmental, Ethical & Social

How consumers view environmentally responsible business operations, such as cutting carbon emissions, using renewable or recyclable materials, preventing pollution, using less packaging, using less energy and water, etc.



How consumers view ethical business operations, such as fair labor practices, paying employees fair wages and benefits, international sourcing from places that treat workers fairly, fair trade, promoting workers' health, safety, and human rights, etc.

How consumers view good community stewardship, such as promoting diversity and inclusion efforts, community engagement, local investment and development, philanthropy and charity, volunteerism, helping traditionally unempowered, or underserved groups, etc.

Overall Sustainability

Waste management, Industrial manufacturers & Mining Oil amongst the worst performers

Across the continent, we asked over 5000 respondents to assess the job done by various industries around sustainability. The assessment includes environmental sustainability, ethical business and social sustainability. The ranking is based on industries ranking poorly with the respondent's assessment.

Overall, **Sanitation and Waste Management Industry is the worst performer in the overall sustainability.** Across the various sustainability sub-categories, consumers believe that the industry is doing a poor job.

Banks & Financial Institutions, Telecommunications Companies and Farmers are doing an ok job in ensuring overall sustainability. Across the subcategories assessed, they are rated lowest.

WORST PERFORMERS	OVERALL	ENVIRONMENTAL	ETHICAL	SOCIAL
Sanitation & Waste Management	1	1	1	1
Industrial Manufacturers	2	2	6	3
Mining Oil & Gas Companies	3	3	8	4
Transportation	4	6	3	5
Government	5	7	2	2
Fast Food Restaurants	6	5	4	7
Food & Beverage Manufacturers	7	4	5	8
Telecommunications Companies	8	9	10	10
Farmers	9	10	7	6
Banks & Financial Institutions	10	8	9	9

“ Sustainability has risen to the top of many stakeholders' priorities in the last few years, not least those of consumers. Operating responsibly is now the baseline of consumer expectations, but beyond knowing their purchase has caused no harm, consumers also want to know how their purchases have helped create a better future for people and the planet. The diamond industry has a significant opportunity to demonstrate its sustainability credentials to a new generation of consumers. Because, as this report highlights, sustainability today is more than the right thing to do; it's critical to maintaining consumer desire, trust and loyalty.

~ Bruce Cleaver, Chairman, De Beers Group

“ In line with our commitment to environmental sustainability and amelioration of irreversible climate disruption, we are focused on utilizing solar power across our operations to drive resilient growth, planting trees to help reverse deforestation, at the same time mainstreaming climate change risks in order to reduce vulnerabilities while also avoiding investments that could cause greater damage.

~ Ade Ayeyemi, CEO, Ecobank

Environmental Sustainability

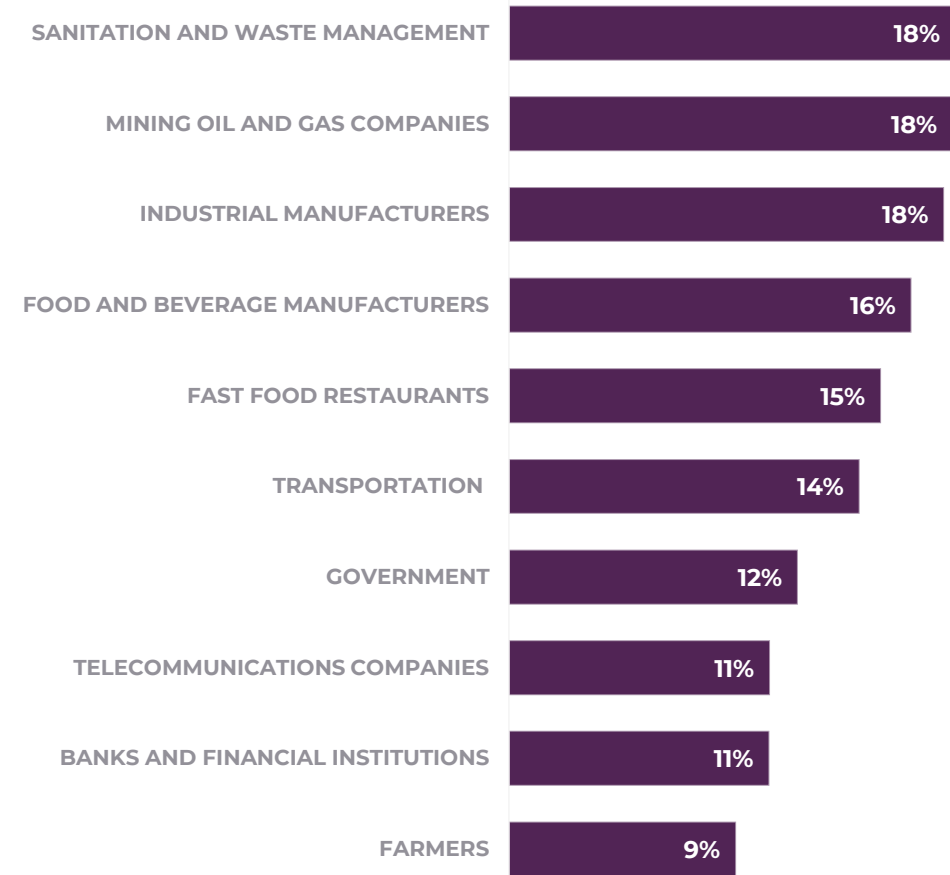
Are industries doing a good job in ensuring environmental sustainability of consumers?

When it comes to ensuring environmental sustainability, consumers believe the following industries are doing a poor job; **Industrial Manufacturers, Sanitation & Waste Management Industries and Mining/Oil & Gas Companies**

However, differences emerge when looking across different countries.

- Whereas **Sanitation and Waste Management** does a poor job in South Africa, the **Government** in Ghana is ranked first. This shows disparity in performance of different industries.
- **Banks & Financial Institutions, Telecommunications Companies and Farmers trying their best to maintain environmental sustainability.** Across the countries assessed, they are rated lowest.

% of respondents saying industries are doing a poor job



Q21. In general, how good of a job do you think each of the following organizations/industries in your country are doing with regards to environmental sustainability?

Environmental Sustainability

Waste management, Industrial manufacturers and Mining Oil worst performers

When it comes to looking at different African markets, the following emerge;

- **Ghana**- The Government is doing a poor job in ensuring environmental sustainability while Banks and Financial Institutions are doing a better job.
- **Ivory Coast**- Fast Food & Restaurants are doing a poor job while the Government is doing a better job in ensuring environmental sustainability.
- **Kenya**- Industrial Manufacturers are doing a poor job while Banks and Financial Institutions are doing a better job in ensuring environmental sustainability.
- **Morocco**- Industrial Manufacturers are doing a poor job while Farmers seem to be doing a better job when it comes to ensuring environmental sustainability.
- **South Africa** – Sanitation & Waste Management Industries are doing a poor job while Telecommunications industries are doing a better job in ensuring environmental sustainability.

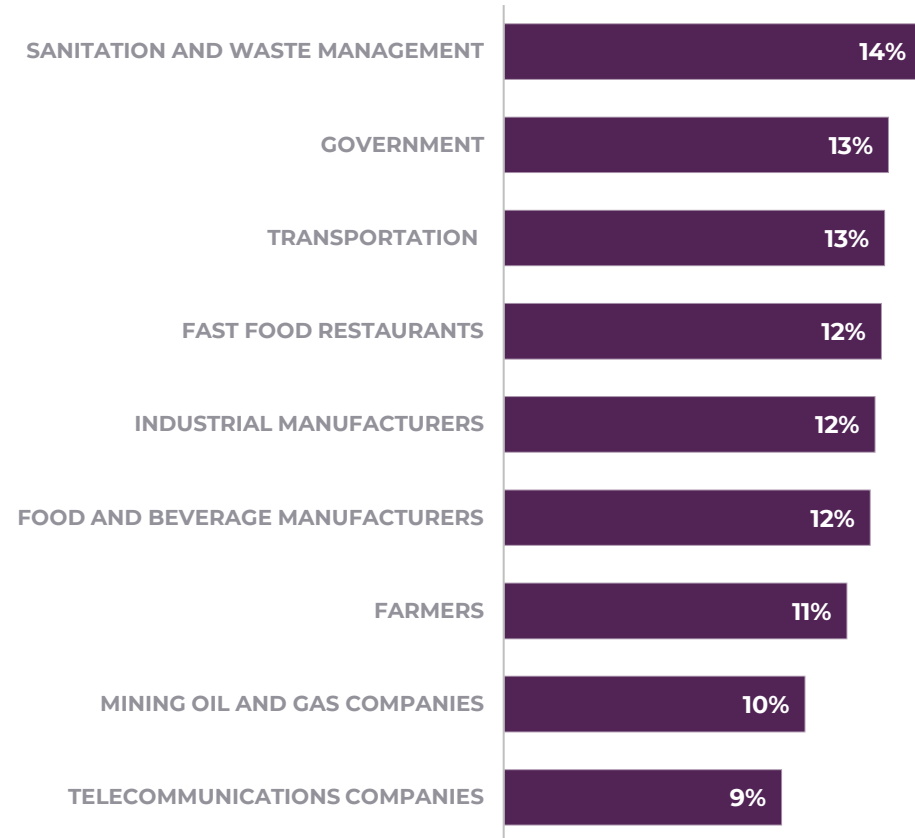
WORST PERFORMERS - ENVIRONMENTAL	OVERALL	GHANA	IVORY COAST	KENYA	MOROCCO	SOUTH AFRICA
Sanitation & Waste Management	1	6	5	3	7	1
Industrial Manufacturers	2	5	6	1	1	4
Mining Oil & Gas Companies	3	7	7	2	4	2
Food & Beverage Manufacturers	4	3	4	6	3	3
Fast Food Restaurants	5	2	1	5	8	5
Transportation	6	4	3	4	5	6
Government	7	1	10	7	9	8
Banks & Financial Institutions	8	10	8	10	2	9
Telecommunications Companies	9	9	2	8	6	10
Farmers	10	8	9	9	10	7

Q21. In general, how good of a job do you think each of the following organizations/industries in your country are doing with regards to environmental sustainability?

Ethical Business

Are industries doing a good job in conducting themselves ethically?

% of respondents saying industries are doing a poor job



Q23. In general, how good of a job do you think each of the following organizations/industries in your country are doing with regards to social sustainability?

When it comes to conducting themselves ethically, consumers believe the following industries are doing a poor job; **Sanitation & Waste Management Industry, Government and Transportation Industry.**

However, differences emerge when looking across different countries.

- **Across different African markets, different industries perform differently.** Whereas Sanitation and Waste Management does a poor job in South Africa, the Government in Ghana is ranked first. This shows disparity in performance of different industries.
- **Banks & Financial Institutions, Telecommunications Companies and Mining Oil and Gas Companies are trying their best to conduct themselves ethically.** Across the countries assessed, they are rated lowest.

Ethical Business

Are industries doing a good job in conducting themselves ethically?

When it comes to looking at different African markets, the following emerge:

- **Ghana**- The Government is doing a poor job in ensuring environmental sustainability while Mining Oil and Gas companies are doing a better job.
- **Ivory Coast**- Food and Beverage Manufacturers are doing a poor job while the Government is doing a better job in ensuring ethical business.
- **Kenya**- Sanitation and Waste Management Industries are doing a poor job while Banks and Financial Institutions are doing a better job in ensuring ethical business.
- **Morocco**- Mining Oil and Gas Companies are doing a poor job while the Government is doing a better job when it comes to ensuring ethical business.
- **South Africa** – Sanitation & Waste Management Industries are doing a poor job while Banks and Financial Institutions are doing a better job in ensuring ethical business.

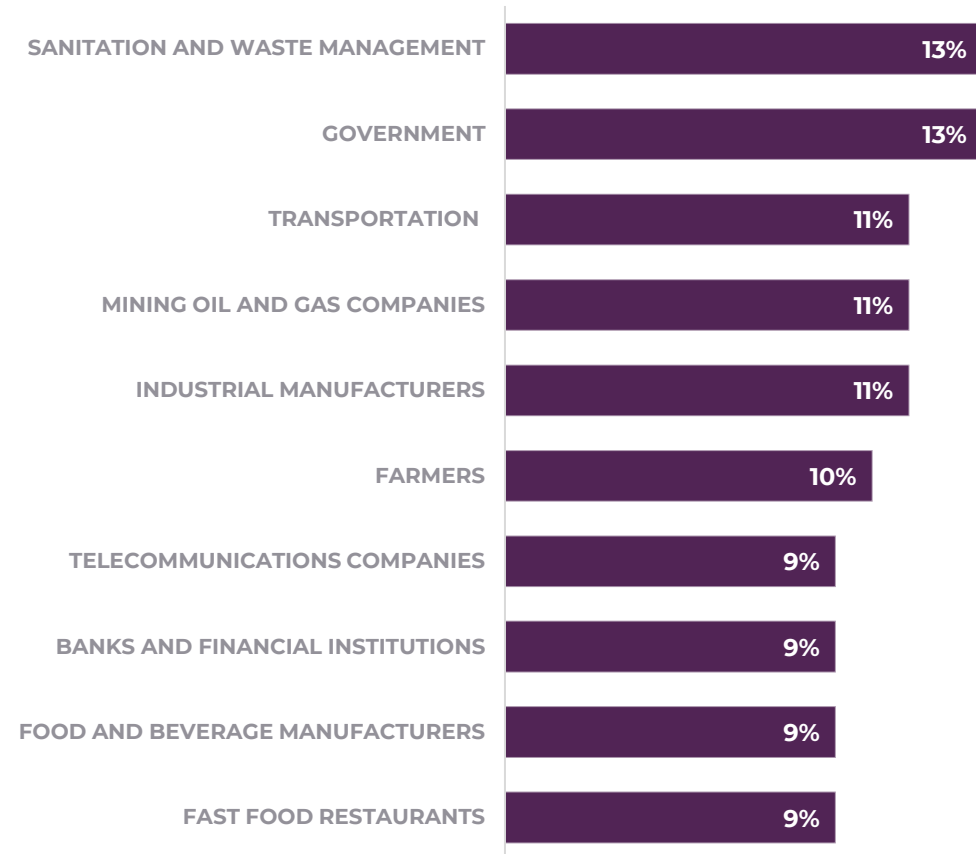
WORST PERFORMERS - ETHICAL	OVERALL	GHANA	IVORY COAST	KENYA	MOROCCO	SOUTH AFRICA
Sanitation & Waste Management	1	5	7	1	3	1
Government	2	1	10	8	10	2
Transport	3	6	5	2	5	3
Fast Food Restaurants	4	2	2	7	9	4
Food & Beverage Manufacturers	5	4	1	6	8	5
Industrial Manufacturers	6	3	6	3	7	6
Farmers	7	7	8	5	4	7
Mining Oil & Gas Companies	8	10	9	4	1	8
Banks & Financial Institutions	9	8	3	10	2	10
Telecommunications Companies	10	9	4	9	6	9

Q22. In general, how good of a job do you think each of the following organizations/industries in your country are doing with regards to ethical business?

Social Sustainability

Are industries doing a good job in ensuring social sustainability of consumers?

% of respondents saying industries are doing a poor job



Q23. In general, how good of a job do you think each of the following organizations/industries in your country are doing with regards to social sustainability?

When it comes to social sustainability, consumers believe the following industries are doing a poor job; Sanitation & Waste Management Industry, Government and Industrial Manufacturers.

However, differences emerge when looking across different countries.

- **Across different African markets, different industries perform differently.** Whereas Sanitation and Waste Management does a poor job in South Africa, the Government in Ghana is ranked first. This shows disparity in performance of different industries.
- **Banks & Financial Institutions, Telecommunications Companies and Food and Beverage Manufacturers are trying their best ensure consumer social sustainability.** Across the countries assessed, they are rated lowest.

Social Sustainability

Are industries doing a good job in ensuring social sustainability of consumers?

When it comes to looking at different African markets, the following emerge;

- **Ghana-** The Government is doing a poor job in ensuring environmental sustainability while Food& Beverage Manufacturers are doing a better job.
- **Ivory Coast-** Telecommunications Companies are doing a poor job while the Government is doing a better job in ensuring social sustainability.
- **Kenya-** Sanitation & Waste Management are doing a poor job while Telecommunication Companies are doing a better job in ensuring social sustainability.
- **Morocco-** Banks and Financial Institutions are doing a poor job while Government is doing a better job when it comes to ensuring social sustainability.
- **South Africa** – Sanitation & Waste Management Industries are doing a poor job while Telecommunications industries are doing a better job in ensuring social sustainability.

WORST PERFORMERS - SOCIAL	OVERALL	GHANA	IVORY COAST	KENYA	MOROCCO	SOUTH AFRICA
Sanitation & Waste Management	1	2	7	1	3	1
Government	2	1	10	5	10	2
Industrial Manufacturers	3	3	5	4	7	3
Mining Oil & Gas Companies	4	8	3	3	6	4
Transportation	5	4	2	2	4	8
Farmers	6	6	4	7	2	5
Fast Food Restaurants	7	7	8	6	9	6
Food & Beverage Manufacturers	8	10	6	8	8	7
Banks & Financial Institutions	9	9	9	9	1	9
Telecommunications Companies	10	5	1	10	5	10

Q23. In general, how good of a job do you think each of the following organizations/industries in your country are doing with regards to social sustainability?



Yannick Lefang, BEng, PRM
Founder/CEO

 yannick@kasiinsight.com



Sandra Beldine Otieno
Research/BI Analyst

 sandra@kasiinsight.com

Contact Us

 **Address**
Riara Corporate Suites – 3rd Floor
Nairobi, Kenya

 **Email**
info@kasiinsight.com

 **Telephone**
(+254) 786 511161

METHODOLOGY

The survey was conducted on 5528 African consumers across twelve markets; Cameroon, Congo, Democratic Republic of Congo (DRC), Ghana, Ivory Coast, Kenya, Morocco, Nigeria, Senegal, South Africa, Tanzania and Tunisia in September 2021.

At Kasi Insight we utilize Random Sampling Intercept Methodology. This involves recruiting respondents through random selection at multiple Kasi interview sites located across the major cities of each country that we survey. This leads to a random, non-quota sample.

The margin of error for a comparable probability-based random sample of the same size is +/- 1%, 19 times out of 20.

All sample surveys and polls may be subject to other sources of error, including, but not limited to methodological change, coverage error and measurement error.

5,528

Respondents aged 18+

12

Countries

+/- 1%

Margin of Error

Cameroon (N=555)
Congo (N=403)
DRC (N=501)
Ghana (N=439)
Ivory Coast (N=484)
Kenya (N=518)
Morocco (N=249)
Nigeria (N=501)
Senegal (N=416)
South Africa (N=561)
Tanzania (N=400)
Tunisia (N=501)

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