



FEED THE FUTURE

The U.S. Government's Global Hunger & Food Security Initiative

EatSafe: Evidence and Action Towards Safe, Nutritious Food

Multi-Country Market Report: Vendor and Consumer Perspectives on the COVID-19 Crisis

Quarter 2: January – March 2021

August 2021



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This EatSafe report presents evidence that will help engage and empower consumers and market actors to better obtain safe nutritious food. It will be used to design and test consumer-centered food safety interventions in informal markets through the EatSafe program.

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1. EXECUTIVE SUMMARY

Insights on the rapidly changing situation from vendors in traditional markets and the consumers that rely on these markets can provide vital information for decision making that supports the availability and affordability of safe and nutritious food during the COVID-19 pandemic. The Keeping Food Markets Working (KFMW)/EatSafe market data presented in this report provide timely information and unique insights on 1) vendors' and consumers' attitudes and behaviour in a set of key markets in Bangladesh, Ethiopia, Kenya, and Nigeria and 2) market systems resilience during the pandemic. This report summarises cross-country analysis of data from rapid surveys undertaken in Bangladesh, Ethiopia, Kenya and Nigeria.

The situation during the COVID-19 pandemic in these countries has slightly improved since the last reporting quarter (October to December 2020). There were variations in COVID-19 caseloads across the four countries with Bangladesh, Ethiopia and Kenya experiencing a surge in cases while Nigeria experienced a decline in cases by March 2021.

The KFMW/EatSafe data show that most market consumers in all countries adopted safety measures and behaviours with masking as the most common measure to mitigate the spread of the virus. Similarly, most vendors in all countries (77-98%) took preventive measures against the virus. The most common preventive measures across all countries were to always wear a mask, remind customers to social distance and increase cleaning of surfaces were. However, offering mobile money to reduce physical contact was another common preventive measure used in Kenya.

Across all countries, 84% to 95% of vendors reported a continued impact on their business due to the pandemic. The most reported business challenges were decreased number of consumers and decreased sales. The proportion of vendors experiencing decreased sales was relatively low for Bangladesh, ranging from 7% to 10% as compared to other countries whose proportion of decreased sales ranged from 29% to 68%. Supply side challenges, such as sourcing products to sell and disruptions in transportation, were most prevalent in Ethiopia and least prevalent in Bangladesh.

Impacts on vendors were also examined by commodity sold. The vast majority (72-93%) of vendors in Kenya and Bangladesh reported decreased customers and sales regardless of the type of commodities they sell. In Nigeria and Ethiopia, vendors from all categories reported decreased customers and sales, but less so for some commodities, such as eggs and dairy in Nigeria (25-50% reported decreases) and grains and legumes in Ethiopia (44-45% reported decreases).

Some supply side difficulties, such as challenges sourcing and transporting products to sell, were consistently lower in prevalence than challenges with decreased customers and sales. Difficulties sourcing products to sell was most prevalent in Ethiopia and for fruits and vegetables (67%) and difficulties transporting goods was most prevalent in Nigeria for poultry, meat, and fish. Across commodities, supply side issues were the least prevalent in Bangladesh—between 6-12%.

Majority of consumers (95% in Kenya, 83% in Nigeria, and 75% in Bangladesh) reported a negative effect on finances due to the pandemic. The most reported effects were loss of job/business/sources of income, and reduced income due to fewer business opportunities. This

could explain the changes in consumer shopping behavior particularly reducing the frequency of shopping trips and avoiding peak hours as reported by a large proportion of consumers in Nigeria, Ethiopia, and Kenya (44-63%). However, prevalence has decreased compared to last quarter, with the biggest decrease happening in Bangladesh. While the changes varied across countries, the monthly changes within the quarter for Nigeria were almost the same and a slight decline across months in Kenya and Ethiopia.

Most consumers relied on savings as a coping mechanism to address the impact of the pandemic on their households. Further to this, the pandemic clearly affected people's food consumption (especially in Kenya and Nigeria) as they started to cut down on food quantity. In Bangladesh, diversification of jobs/income did not seem to be practiced widely.

We also assessed market systems resilience in Bangladesh, Kenya and Nigeria (GAIN, 2021a, 2021b, 2021c) based on the *USAID market system resilience framework* using four of the eight domains to characterize resilience capacities. On connectivity, most vendors across all three countries experienced decreases in the number of customers per day, but particularly so in Bangladesh (99%) and Kenya (81%). On cooperation, the share of vendors reporting sharing of resources was highest in Kenya (91%) and lowest in Bangladesh (27%). The most common resource sharing across all countries was the use of handwashing facilities, although sharing transportation and suppliers; and masks were also mentioned by most vendors in Kenya and Nigeria respectively. On business strategy, the results show that consumers were rarely asked for feedback. Of all the 3 countries, Nigeria seemed to do relatively well in market officials/vendors soliciting feedback from consumers (21%). In Bangladesh, no feedback was sought from consumers whereas in Kenya, only 5% of the interviewed consumers had asked market officials/vendors to provide feedback. Another business strategy was access to loans to cope with the pandemic effects. The most common source of loans in Kenya was informal cooperative (67%), relatives in Bangladesh (59%), and friends in Nigeria (38%). A small number of vendors in all three countries had access to formal bank loans (14 -18%); in spite of the small proportion, it is a promising indication of financial inclusion.

Despite the persistent challenges related to COVID-19, most of the vendors across all surveyed countries indicated that they intended to continue with the same business (92% in Bangladesh and Nigeria, and 75% Kenya).

BACKGROUND

Since early 2020, the necessary COVID-19 lockdowns have placed a spotlight on the weaknesses of food systems across the world. In the COVID-19 context, a critical part of supporting the health and resilience of people and economies is to protect the nutritional status of current and future generations. The Global Alliance for Improved Nutrition (GAIN) has developed the *Keeping Food Markets Working (KFMW) program* as an emergency response to the COVID-19 crisis, providing rapid support to food system workers involved in the supply of nutritious foods, and to fresh food markets. While disease control responses to the pandemic are essential, they may also disrupt food systems, depress income, and put a strain on social protection programs, which can threaten the nutritional status of the most vulnerable. The KFMW program is focused on mitigating those risks and keeping affordable nutritious foods flowing in African and Asian markets to the people who need it the most.

Through KFMW, the USAID-funded programme EatSafe: Evidence and Action Towards Safe, Nutritious Food is working to better understand the rapidly changing situation in traditional food markets from the vendor and consumer perspectives in order to help markets stay open and operate safely. EatSafe is a five-year project aiming to enable lasting improvements in the safety of nutritious foods in traditional markets by focusing on the consumer. EatSafe is led by GAIN, and partners include the International Livestock Research Institute (ILRI), and Pierce Mill Entertainment and Education.

While traditional markets are an important source of food and income for the nutritionally vulnerable, they also create ideal conditions for transmission of the virus. Market vendors in traditional markets, already operating on very tight margins, must now make difficult choices on whether to return to their food sales workplaces or to shutter them. Working in crowded, risky environments, and falling ill could have devastating effects not only on their family finances and the nutrition security of the entire household, but also for their consumers; these decisions have potentially far-reaching consequences.

While rich and valuable information is now emerging on the resilience of supply chains that move food to traditional markets, the situation for market vendors and consumers in these markets remains unseen. Understanding the rapidly changing situation—especially related to health and safety procedures, the availability of nutritious foods, and the resilience of traditional market—will help ensure the availability of affordable, safe, nutritious food under COVID-19 and provide vital information for further programming.

The analysis presented here provides a unique perspective, delving into the perceptions and actions of vendors and consumers on the ground and how their businesses, products, and supply chains are responding to critical limitations and uncertainty. Rapid information gathering, assessment, and dissemination of COVID-19 prevention best practices in traditional markets builds on GAIN's established relationships with traditional markets where nutritious foods are traded and sold. (Surveys were conducted in adherence with GAIN's internal ethical guidelines on COVID-19 prevention and control).

2. INTRODUCTION

This report presents multi-country results from rapid assessment in urban markets in Bangladesh, Ethiopia, Kenya and Nigeria, for the January–March 2021 timeframe. The report is divided into three main sections: a) a snapshot of the COVID-19 situation in each country to provide context for the market assessments; b) descriptive results on vendors' and consumers' attitudes and behavior in traditional markets in response to the COVID-19 pandemic; and c) descriptive results related to vendor and consumer resilience, based on a market resilience approach.

3. COVID SITUATION

Second year into the COVID-19 pandemic, the number of reported cases both globally and in KFMW countries continues to rise with varied timelines and trajectories (*WHO Coronavirus (COVID-19) Dashboard*, n.d.). Second waves often resulted in re-imposed government restrictions and more economic implications (GAIN, 2021d).

Below is the summary situation for the first quarter of 2021 in Bangladesh, Ethiopia, Kenya, and Nigeria. Figure 1 displays recent trends (through March 2021) in new cases per million people in each country, though recorded cases are likely an underestimate of the true scale of the outbreak.

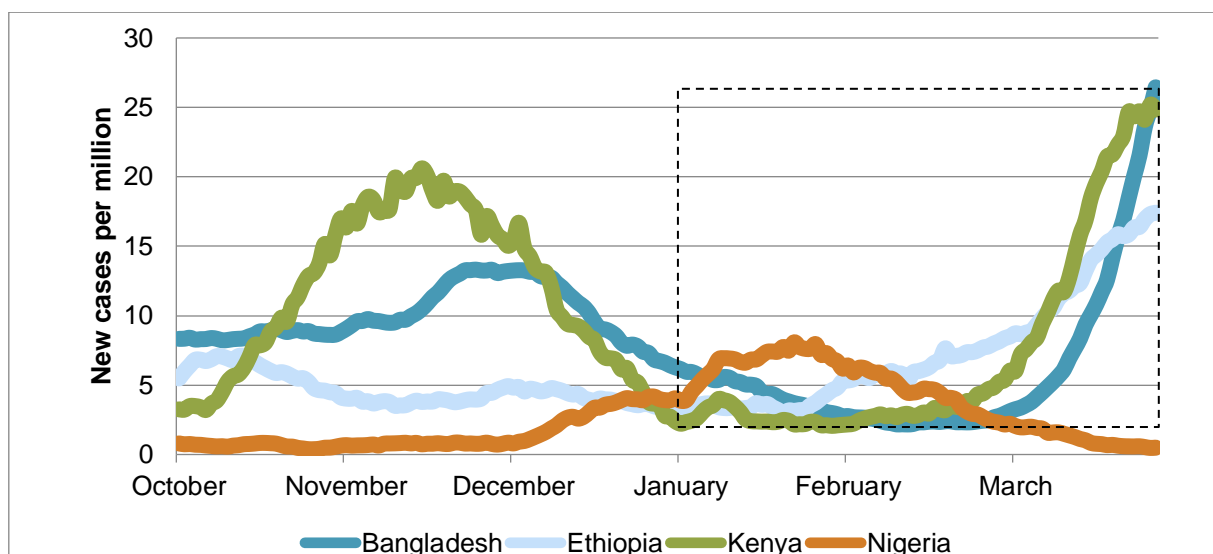


Figure 1. New confirmed cases of COVID-19 per million people, in Bangladesh, Ethiopia, Kenya and Nigeria (7-day smoothed)

Source: (Our World in Data, n.d.)

In Bangladesh, cases began decreasing in December 2020 through February 2021. A significant increase was seen in early March 2021, maintained throughout the month, reaching its peak in late March 2021. This resulted in the government re-imposing restrictions including a regional lockdown in some parts of the country (GAIN, 2021d).

Ethiopia is currently one of the five African countries with highest number of confirmed COVID-19 cases. As of late March, 2021 there was a 10% weekly change in confirmed cases, an increase

from 4% weekly change in January 2021. The steady surge in confirmed cases started in late January, reaching its peak in mid-March 2021. Restrictions focusing on preventive measures such as mask wearing and limiting the number of participants in face to face meetings to 50 are back in place (UNHCR, 2021).

In Kenya, after experiencing more deaths and new infections resulting from the second wave of infections and the December 2020 strike by Kenyan healthcare workers, cases significantly declined at the start of 2021. Cases started rising again in early February, with a steady increase until reaching a peak in late March. A night-time curfew and other restrictions were extended until March 2021 to curb COVID-19 spread.

Nigeria showed an upward trend from December 2020 that was sustained until late January 2021, when cases began decreasing. At the end of March 2021 there was a 72% drop in reported cases. Measures restricting movement have been lifted. However, COVID-19 recommended guidelines including face masks, physical distancing, and avoidance of public gatherings remain in place (iMMAP, 2021).

4. VENDORS' AND CONSUMERS' ATTITUDES AND BEHAVIOR

The KFMW/EatSafe rapid assessment market survey provides timely information on vendors' and consumers' attitudes and behavior in traditional markets in response to the COVID-19 pandemic.

Data were collected from two markets within each country, approximately every two weeks. In consultation with local officials, two markets were chosen in or near the capital cities of the focus countries. Criteria for choosing markets included that it be an open-air market selling fresh foods, engage in direct sales to consumers, and be a major market serving the urban population. Countries rolled out the surveys at different times and thus have conducted different numbers of survey rounds to date. In each round approximately 40 consumers and 40 vendors were interviewed. For vendor surveys, a non-random stratified sampling approach was taken in each round, aiming to represent both the gender composition of the market vendors and the distribution of different commodity categories. A convenience sampling approach was taken for consumer surveys. While the sample may not be representative of the population, it provides critical insights into the perceptions of vendors and consumers over time in the focus countries.

This report presents data from Bangladesh, Ethiopia, Kenya, and Nigeria between January-March 2021. In Bangladesh, data collection was in Islambagh and Bonolota markets in Dhaka. The analysis represents six rounds of bi-weekly data collected from a cumulative total of 440 vendors and 440 consumers. In Ethiopia, data collection was in Kera and Jane-Meda markets in Dhaka. Analysis includes data from two rounds of data with 262 consumers and 238 vendors. In Kenya, data collection was in Madaraka and Machakos markets, outside of Nairobi. The analysis represents six rounds of bi-weekly data collected from 540 vendors and 542 consumers. In Nigeria, data collection started took place in Utako and Gosa markets in Abuja. The analysis represents four rounds of bi-weekly data collected from 360 vendors and 360 consumers.

4.1 SURVEY POPULATION

As shown in Table 1, 1 female vendors represented 65% of those interviewed in Kenya 36% in Nigeria, and 18% in Ethiopia. In Bangladesh no female market vendors were interviewed. Restrictive norms related to gendered participation in commerce in South Asia can explain the dearth of female vendor respondents in Bangladesh. The age distribution for vendors was often younger. In Ethiopia and Nigeria, more than half of vendors (69% and 67% respectively) were between 25–40 years old, with slightly lower proportions in Bangladesh and Kenya. In Bangladesh, 81% consumers interviewed were male, while most interviewees in Ethiopia and Nigeria were female (76% and 66%, respectively).

	Gender		Age group					
	Males	Females	18–24	25–30	31–40	41–50	51–65	66–75
Bangladesh								
Consumers	81%	19%	9%	19%	33%	27%	11%	1%
Vendors	100%	0%	7%	21%	29%	31%	11%	1%
Kenya								
Consumers	42%	58%	17%	33%	29%	13%	7%	1%
Vendors	35%	65%	7%	18%	27%	24%	20%	4%
Nigeria								
Consumers	34%	66%	14%	31%	34%	19%	2%	0
Vendors	64%	36%	5%	27%	40%	23%	5%	0
Ethiopia								
Consumers	24%	76%	16%	29%	30%	16%	7%	2%
Vendors	82%	18%	17%	35%	34%	12%	2%	-

Table 1. Market assessment respondent demographics

Major commodity sold was a sampling criterion to capture sales of nutritious commodities of interest (Table 2). Most vendors specialised in one of the following commodity groups: fruits and vegetables; grains and legumes; packaged/processed foods; poultry, meat and/or fish; and eggs and dairy. Typically, grain and legume sellers also sell some packaged foods so these commodity groups were combined. Overall, a small share of vendors (7% in Bangladesh, 17% in Kenya, 35% in Nigeria and 18% in Ethiopia) specialised in two or more commodities. Ethiopia was the only KFMW country where none of the sampled vendors sold poultry, meat and/or fish as their major commodity.

KFMW Country	Fruits and vegetables	Grains, legumes, packaged	Poultry, meat and/or fish	Eggs and dairy	Mixed commodities
Bangladesh	4%	14%	47%	28%	7%
Kenya	29%	12%	14%	28%	17%
Nigeria	9%	24%	15%	17%	35%
Ethiopia	31%	2%	-	49%	18%

Table 2. Major commodities sold by vendors

¹ The sample was not random: care should be taken in generalising the results to the broader population.

4.2 VENDOR AND CONSUMER PERCEPTIONS OF MARKET SAFETY DURING COVID-19

Consumers and vendors were asked about any safety measures they noticed put in place by the market. Overall responses were similar between vendors and consumers. More than half of the consumers and vendors in Kenya, Nigeria and Bangladesh observed safety measures, the most common being installation of hand washing/sanitizing stations and mask mandates for consumers and vendors (Figures 2a and 2b). On hand washing/sanitizing stations, they were observed in Kenya and Nigeria by more than half of interviewees and by slightly less than half of respondents in Bangladesh. Ethiopia however had the lowest proportion of consumers (20%) and vendors (30%) that noticed hand washing stations in markets. Mandated distancing was more common in Kenya and cleaning markets with disinfectant less common. Bangladesh had the lowest proportion of consumers who noticed mandated distancing.

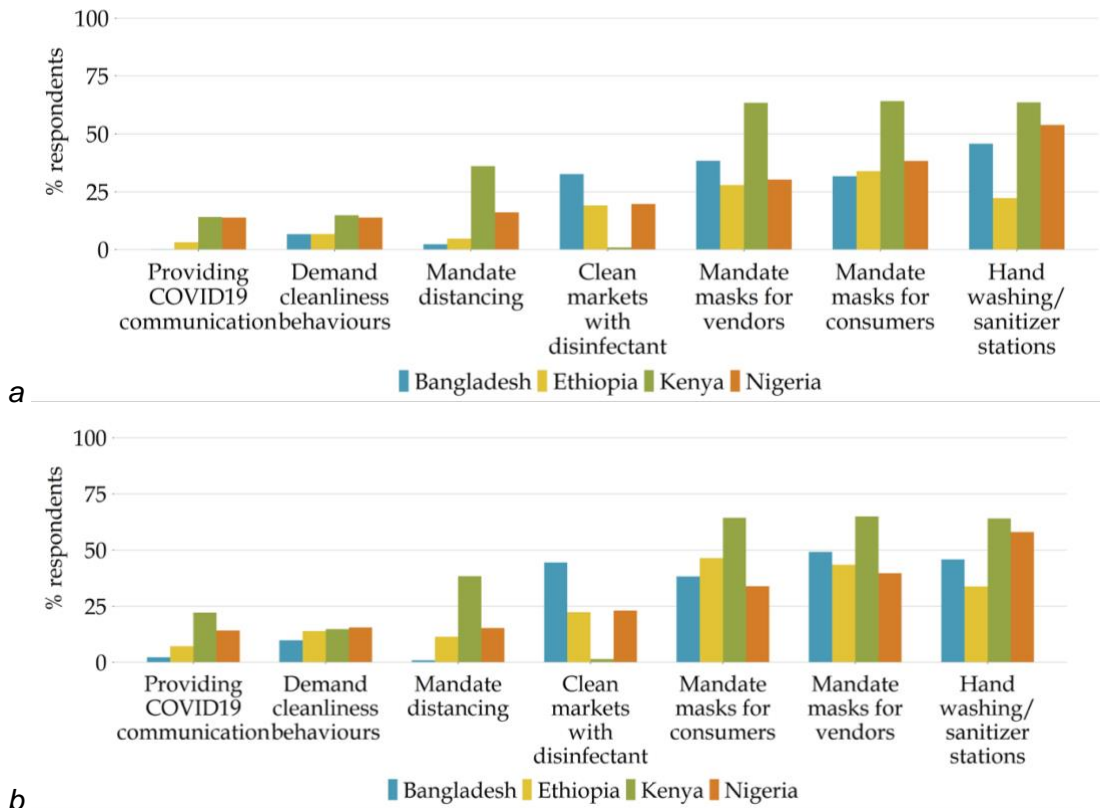


Figure 2. Observed safety measures by consumers (a) and vendors (b)

In all four countries, the majority of vendors reported taking preventive measures to reduce risk, from a low of 77% in Ethiopia to a high of 98% in Kenya (Figure 3a). Of all potential preventive measures, always wearing a mask was most common across the countries (Figure 3b).

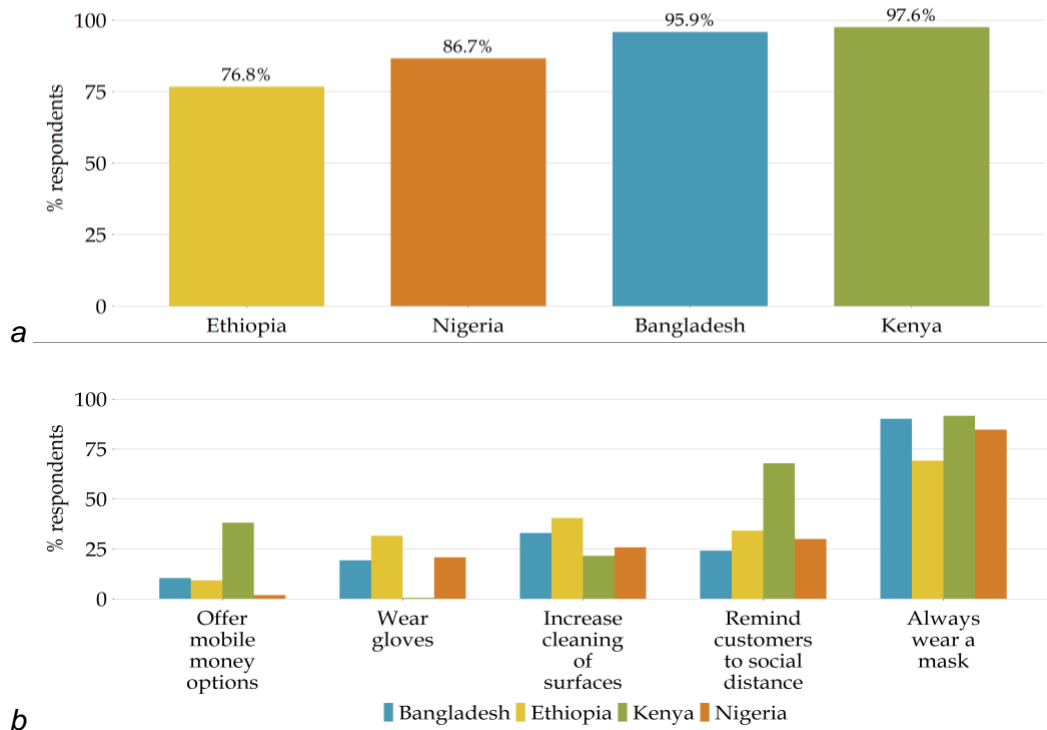


Figure 3. Proportion of vendors taking preventive measures to reduce risk of COVID-19 (a) and the preventive measures taken (b)

4.3 PERCEIVED EFFECTS OF COVID-19 ON FOOD PURCHASE AND SALES

4.3.1 CHANGES IN CONSUMER SHOPPING BEHAVIOR

Consumers were asked about changes in shopping behavior due to COVID-19 in the two weeks prior to the survey. The greatest changes occurred in Kenya and Ethiopia (~60%), while lowest in Bangladesh (14%) (Figure 4). In all four countries, consumers were less likely to report changes in shopping behavior this quarter (Jan-March 2021) compared to the previous quarter (Oct-Dec 2020).² The decrease was most drastic in Bangladesh (from 34% to 14%).

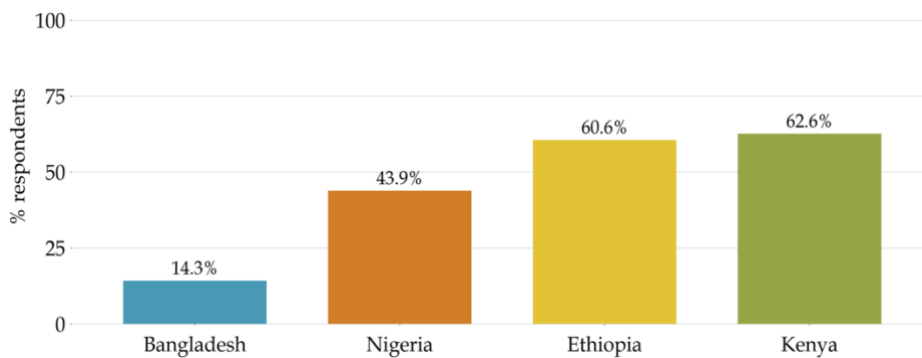


Figure 4. Changes in consumer's shopping behavior due to COVID-19

² Changes over time are statistically significant in Bangladesh, Nigeria and Kenya at the 95% level.

The most common behavior changes reported overall was reducing the frequency of shopping trips, except in Bangladesh where it was only mentioned by 5% of consumer (compared to 23% in the previous quarter, Oct-Dec 2020) (Figure 5). Other common changes included avoiding the market during peak shopping hours and demanding cleanliness from vendors. In Ethiopia women were more likely to report avoiding peak shopping hours than men: 31% compared to 10%. The most common behavior change in Bangladesh was demand for cleanliness from vendors (13%). Compared to the other countries, use of mobile money was most common in Kenya (26%).

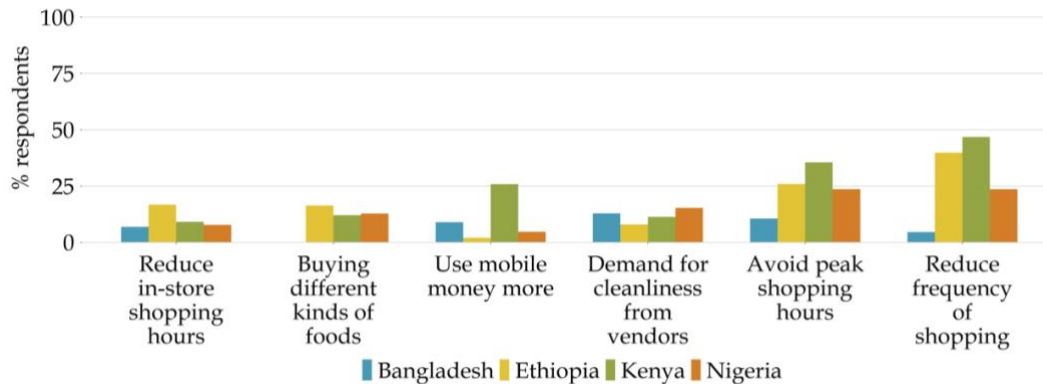


Figure 5. Most common changes in consumer's shopping behavior due to COVID-19

4.3.2 EFFECTS FELT BY VENDORS

Vendors were asked if COVID-19 had a continued impact on their business, which was very high at 84%–95% in all countries. Specific challenges were relatively consistent across countries, including decreased customers and sales (Figure 6). An exception is found in supply-side difficulties, like transportation and sourcing products to sell, which were more commonly faced by vendors in Ethiopia than other countries. Interestingly, in Nigeria and Ethiopia, the share of male vendors facing decreased sales and customers was higher than for female vendors.³

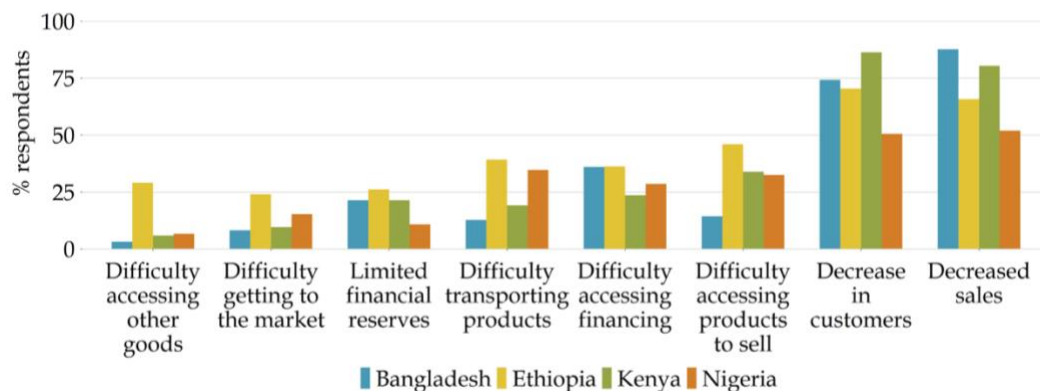


Figure 6. Impacts of COVID-19 on vendor's business

³ Gender differences were statistically significant at the 95% level.

Impacts on vendors may differ by commodity. Disaggregating vendor impacts by commodities sold, decreased customers and sales continue to stand out as those mentioned at the highest rates. In Kenya and Bangladesh, between 72-93% of vendors reported decreased customers and sales, across all food groups (Figures 7a and 7b). Ethiopia and Nigeria are slightly more varied, with a range of 25-80% of vendors reporting decreased sales and customers; markedly fewer vendors faced these problems for eggs and dairy in Nigeria and grains and legumes in Ethiopia.



Figure 7. Demand side challenges from COVID-19: decreased customers (a) and sales (b), by country and commodity

Some supply side difficulties, specifically challenges sourcing (Figure 8a) and transporting (Figure 8b) products to sell, are shown by commodity in Figure 8. These challenges—as well as difficulties sourcing other business-related goods, not shown here—were most prevalent in Ethiopia and for fruits and vegetables (50-68%). Across commodities, supply side issues were the least prevalent in Bangladesh—between 6-12%.

Overall, demand-side difficulties were more prevalent than supply-side across countries, with the smallest gap in Ethiopia and the largest gap in Bangladesh.



Figure 8. Supply-side challenges from COVID-19: difficulty sourcing products to sell (a) and difficulty transporting products to sell (b), by country and commodity

5. MARKET RESILIENCE

The KFMW/EatSafe market resilience assessment tracks a set of consumers and vendors through the pandemic to understand the implications for market system resilience.

Food market systems have been significantly stressed during the pandemic. Beyond the initial shock of strict lockdowns and trade disruptions, it is important to consider how food market systems serving the poor will cope with the ongoing pandemic and what support may be needed to support eventual recovery. A market resilience framework considers how market actors (vendors and consumers) react to the shocks and stresses they have faced in light of COVID-19—it emphasizes the patterns of behaviour and the interconnectedness of impacts, rather than the state of individual actors (Downing et al., 2018).

Market resilience surveys explore the perceptions and behaviours of a small panel of respondents in each market over time. We follow up with the same set of approximately 30 vendors and 30 consumers, purposively sampled based on age and gender, with a monthly phone survey. Many aspects of resilience are not implicitly negative or positive, so individual data points may be of limited value. However, over time, this data will provide critical information on the state of different resilience capacities and the orientation or directionality of market resilience.

This report presents the first quarter of resilience data for Bangladesh, Kenya and Nigeria.⁴ Data was collected monthly between 12 January and 24 March. As shown in Table 3,⁵ in Bangladesh there were more male consumers and vendors interviewed (73% and 100% respectively) as compared to Nigeria (31 % and 63% respectively) and Kenya (40% and 29% respectively). The age distribution for Bangladesh consumers was young, 73% of consumers were between 18 and 40 years old. For vendors age distribution was almost split into half between the young (18-40 years) and older age groups (41 –65 years and older) at 53% and 47% respectively. In Nigeria, the share of consumers in the age category 25-40 years was slightly higher than the consumers in the 41-65 age categories (53% versus 47%), while for vendors, most of them were in the 18-40 age category (70%).

⁴ Data on Ethiopia will be included in the next quarterly report.

⁵ Data on respondent age in Kenya is currently missing but will be filled in next quarter.

	Bangladesh		Kenya		Nigeria	
	Consumers	Vendors	Consumers	Vendors	Consumers	Vendors
Gender						
Males	73%	100%	40%	29%	31%	63%
Females	27%	0	60%	71%	69%	37%
Total #	89	90	87	89	96	90
Age						
18-24	13%	13%	-	-	0	0
25-30	30%	17%	-	-	9%	20%
31-40	30%	23%	-	-	44%	50%
41-50	10%	20%	-	-	6%	3%
51-65	10%	17%	-	-	41%	27%
66-75	7%	10%	-	-	0	0
Highest level of school attended						
No school attendance	13%	14%	0	0	0	50%
Primary	17%	40%	37%	57%	44%	23%
Secondary	17%	23%	43%	27%	53%	17%
Higher	53%	23%	20%	16%	3%	10%
# of years living in city for consumers or # of years as a vendor in surveyed market						
< 1 year	7%	7%	10%	10%	0	0
1 – 3 years	7%	3%	7%	7%	6%	10%
3 – 5 years	3%	7%	10%	13%	3%	13%
5 – 10 years	27%	10%	17%	7%	28%	53%
10+ years	56%	73%	56%	63%	63%	24%

Table 3. Market resilience assessment respondents demographics

On highest level of school attended, 53% of the consumers in Bangladesh attended higher education, 20% in Kenya and 3% in Nigeria. On the other hand, 23% of vendors in Bangladesh had higher education, 16% in Kenya and 10% in Nigeria. Bangladesh was the only country with consumers that had never attended school (13%). Half of the vendors interviewed in Nigeria and 14% in Bangladesh had never attended school while Kenya there was no interviewed vendor stated to not have attended school.

Most of the consumers interviewed in all 3 countries had lived in the city for longer than 10 years as of March 2021. Seven percent and 10% of consumers in Bangladesh and Kenya respectively had lived in the city for less than a year. In Nigeria, none of the consumers interviewed had lived in the city for less than a year.

Most of the vendors interviewed in Bangladesh were operating in the market for longer than 10 years (73%). About 2/3 (63%) and 24% of Kenyan and Nigerian vendors respectively had been operating in the market for longer than 10 years. None of the vendors in Nigeria were working in the market for less than a year.

6. CONSUMER RESILIENCE

Figure 9 shows the share of consumers who said they and their households were experiencing financial challenges in the first quarter of 2021 that they related to the pandemic. Most consumers in all three countries indicated that their finances were negatively affected by COVID-19.

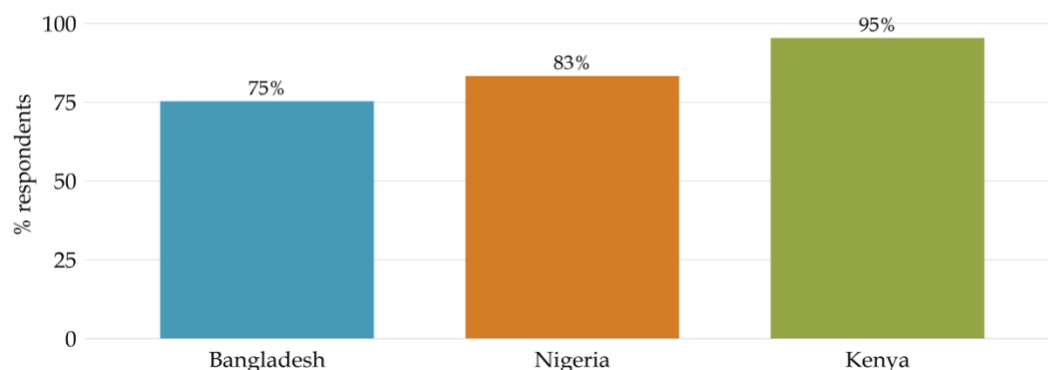
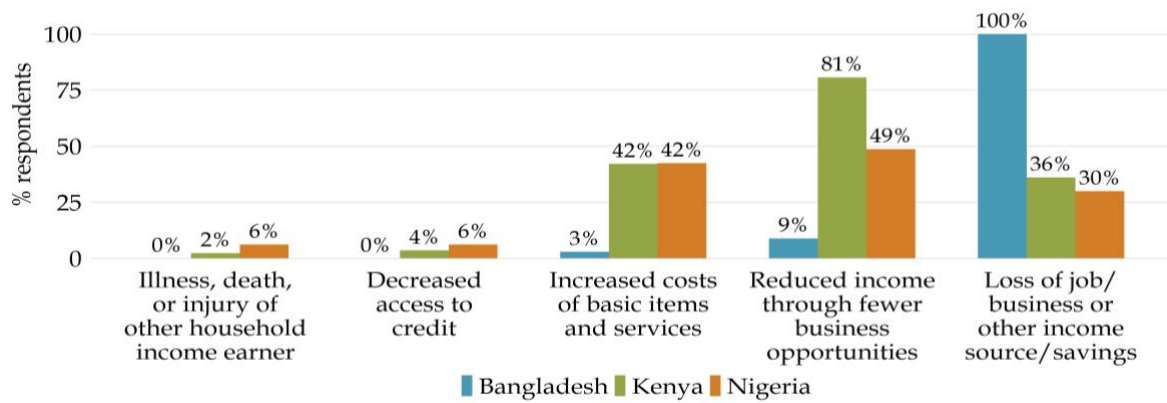


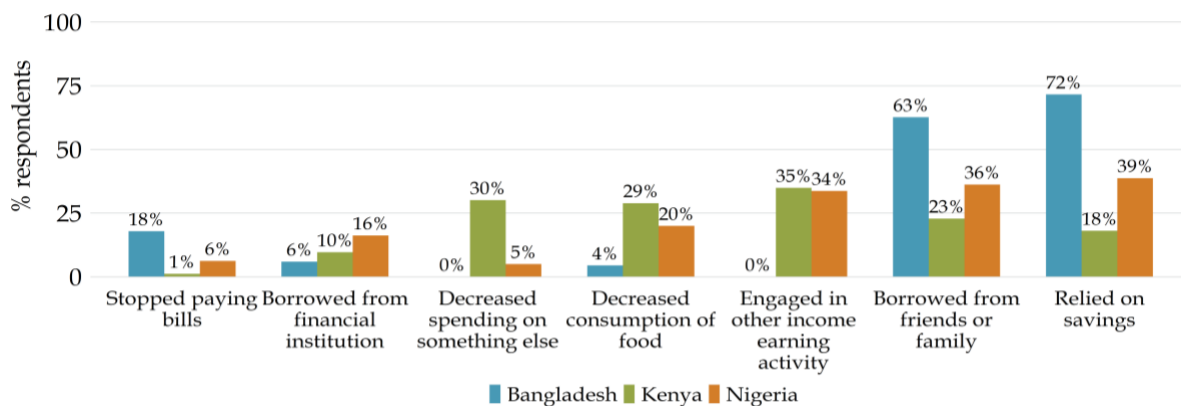
Figure 9. Proportion of consumers and households negatively financially affected by COVID-19

Additionally, financially affected consumers were also asked in what ways COVID-19 had impacted them and their households (Figure 10a). Loss of job/business/source of income was the most reported effect in Bangladesh (100%) while the impact reported the most in Kenya and Nigeria was reduced income due to fewer business opportunities (81% and 49% respectively). Another effect on households for Kenya and Nigeria was increased costs of basic items and services (42% for both countries).

Figure 10b shows various coping mechanisms that households relied on to mitigate COVID-19 negative effects. Reliance on savings was the most common coping mechanism in Bangladesh (72%) and Nigeria (39%), followed closely by borrowing from friends or family (63% in Bangladesh and 36% in Nigeria). In contrast, in Kenya it was more common to engage in additional income earning activities (35%). A particularly concerning response is decreasing food consumption, which was mentioned by 29% of consumers in Kenya and 20% in Nigeria. While few in Bangladesh decreased food consumption (4%), 18% stopped paying bills. The share of consumers who were able to borrow from financial institutions was not high, but it suggests that these consumers benefit from some degree of financial inclusion.



a



b

Figure 10. Effect of COVID-19 on financially affected consumer’s and their households (a) and consumers’ and their households coping mechanisms (b)⁶

6.1 CONNECTIVITY

Connectivity includes both connectivity vendors or other market actors may have but also the relationships between connected actors. Too many or too few connections can hamper the capacity to generate or sustain the growth of the market system. We measured vendor connectivity by assessing the number of (and changes to) customers they typically have per day. The share of vendors with more than 35 customers per day is much higher in Bangladesh (67%) than in Kenya or Nigeria where only around 15% of vendors have these many customers (Figure 11).

Figure 12 shows the share of vendors experiencing decreases in the number of customers per day over the last 9 months. It is extremely high across all three countries, but particularly so in Bangladesh (99%) and Kenya (81%).

⁶ Figure 10 is a response to a follow up question on the ways in which financially affected consumers and their households have been impacted, and their coping mechanisms

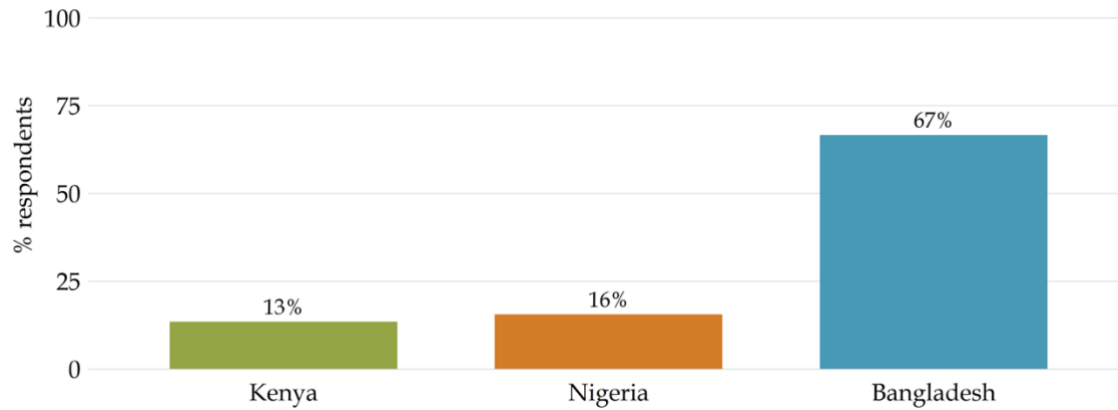


Figure 11. Share of vendors with more than 35 customers per day

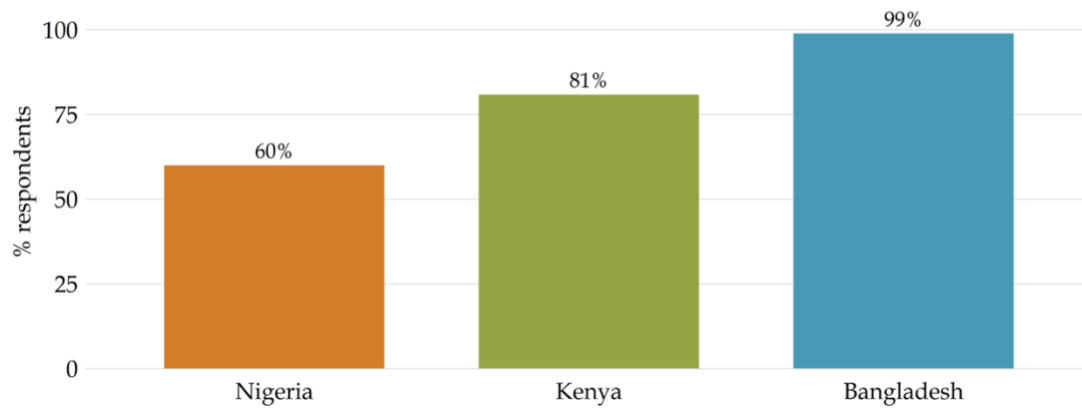


Figure 12. Share of vendors with decreased customers

6.2 COMPETITION

Competition is rivalry between two or more entities. Like cooperation, competition can be negative or positive. Its contribution to system resilience capacities depends on how and why the entities are competing. Competition in this context is characterised by consumers' food outlet preferences and perceptions of trustworthiness of vendors.

Figure 13a shows consumers' reasons for shopping in the surveyed market, while 13b shows other food outlets patronized. Prices, convenience, and quality/variety were the most common reasons for choosing the market across countries. Relationships with vendors was relatively important in Kenya (30%), compared to the other countries. For alternative food outlets, consumers in Bangladesh and Nigeria frequent other traditional markets, while in Kenya 41% also shop in supermarkets. Small shops/kiosks are also somewhat important in Kenya and Nigeria.

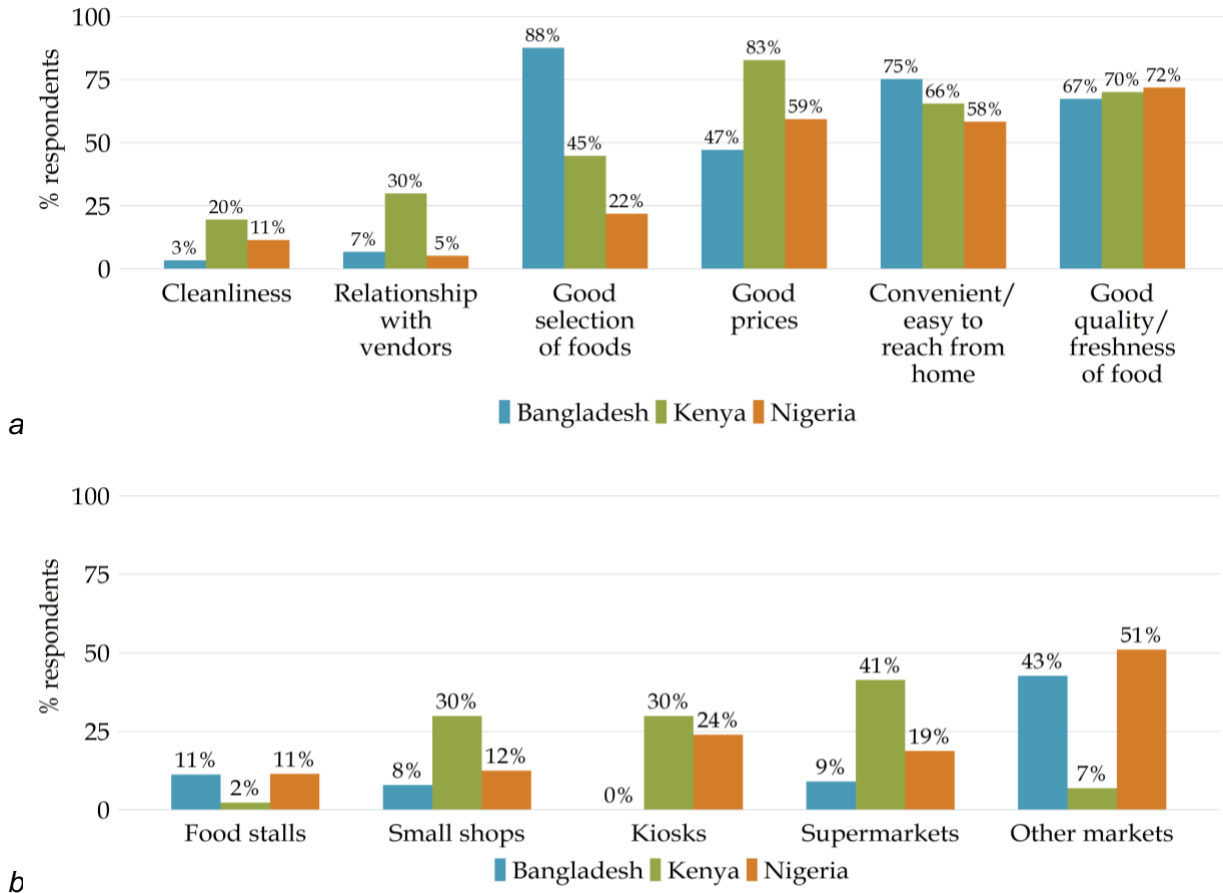


Figure 13. Reasons for choosing to buy food at the surveyed market (a) and other food outlets used (b)

Majority of vendors in all 3 countries were considered trustworthy by consumers that bought food from them (Figure 14). However, between a significant share of respondents in Kenya (40%) and Nigeria (44%) reported that only a few vendors were trustworthy.

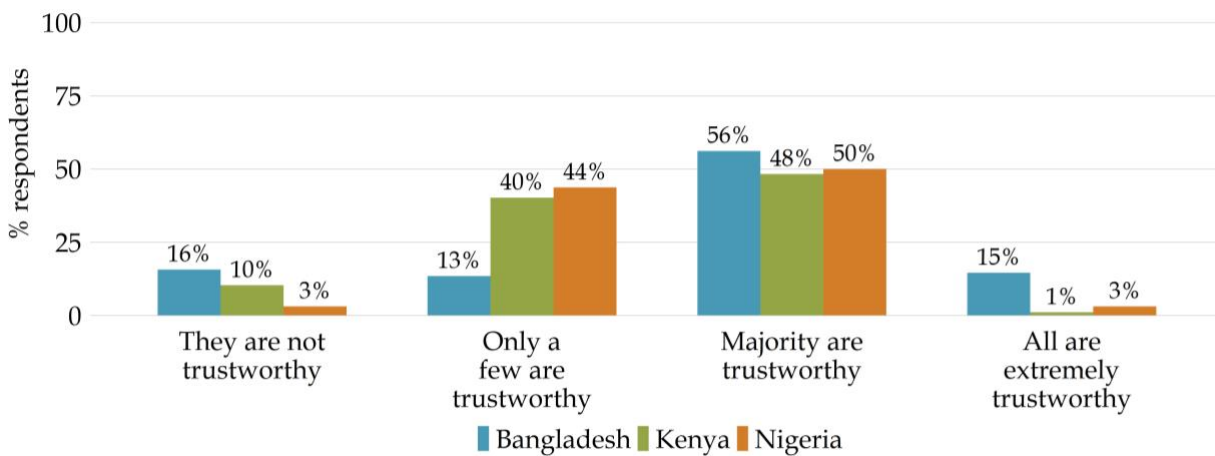


Figure 14. Level of trust for vendors

On inquiry, consumers reported their reasons for having good or low level of trust with vendors (Figure 15a and 15b). Repeat contact is important for trust across countries: how well the vendor is known was the most common reason for trust and lack of trust.

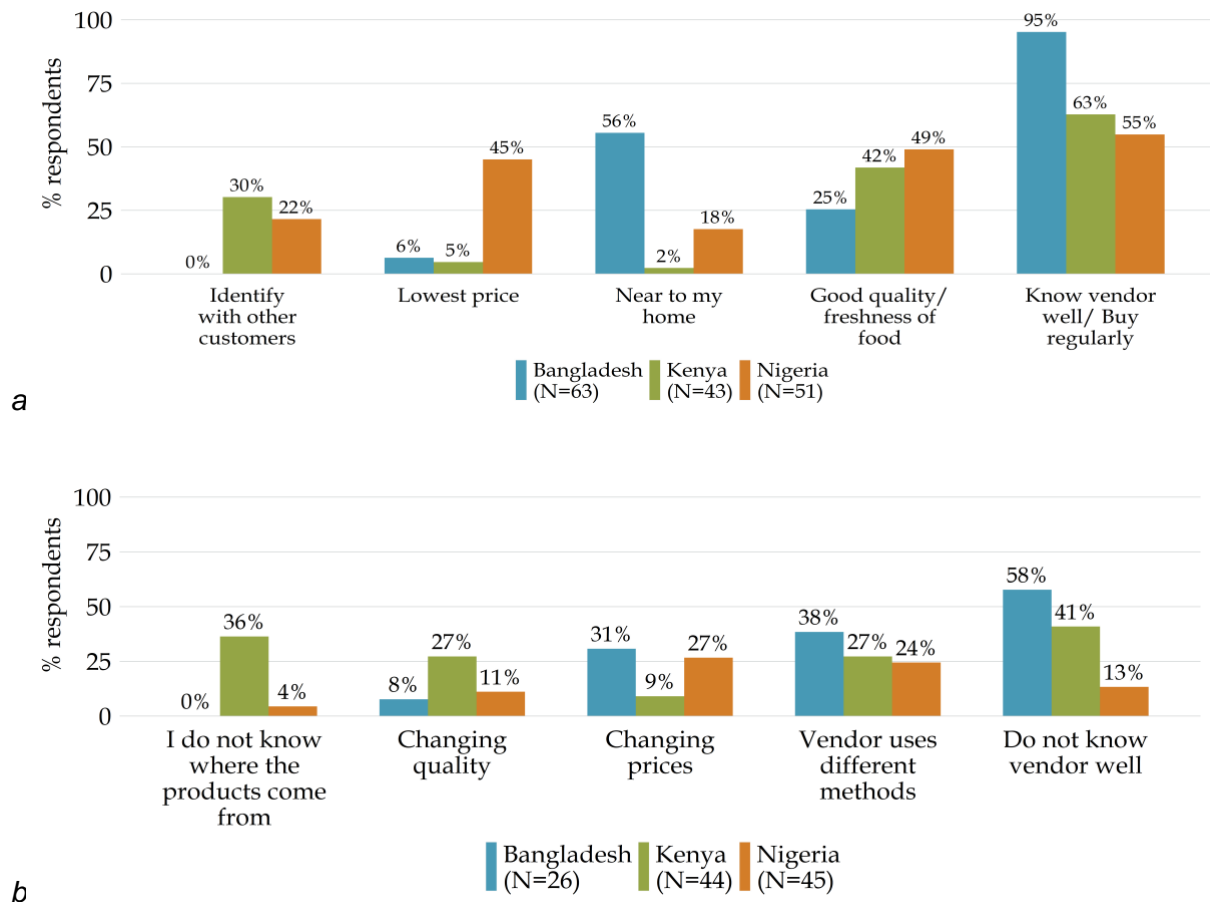


Figure 15. Reasons for good level of trust for vendors (a) and reasons for low level of trust for vendors (b)

6.3 COOPERATION

Cooperation refers to market actors collaborating to achieve a common purpose or function. Cooperation is neither good nor bad and the contribution of cooperation depends on the purpose. Here cooperation was measured by asking vendors if they have started sharing resources with other businesses due to COVID-19. As shown in Figure 16a, vendors reporting sharing resources is highest in Kenya (91%); the most common resource sharing is the use of handwashing facilities, however sharing transportation and suppliers was also mentioned by most vendors in Kenya (Figure 16b). In Nigeria, sharing sanitizer was highest, followed by handwashing facilities and masks. The fewest vendors reported sharing in Bangladesh (27%) and they only reported sharing 2 resources: handwashing stations and sanitizer. While sharing in Bangladesh and Nigeria was largely for pandemic-related resources, in Kenya most vendors also substantive business resources: transportation and suppliers.

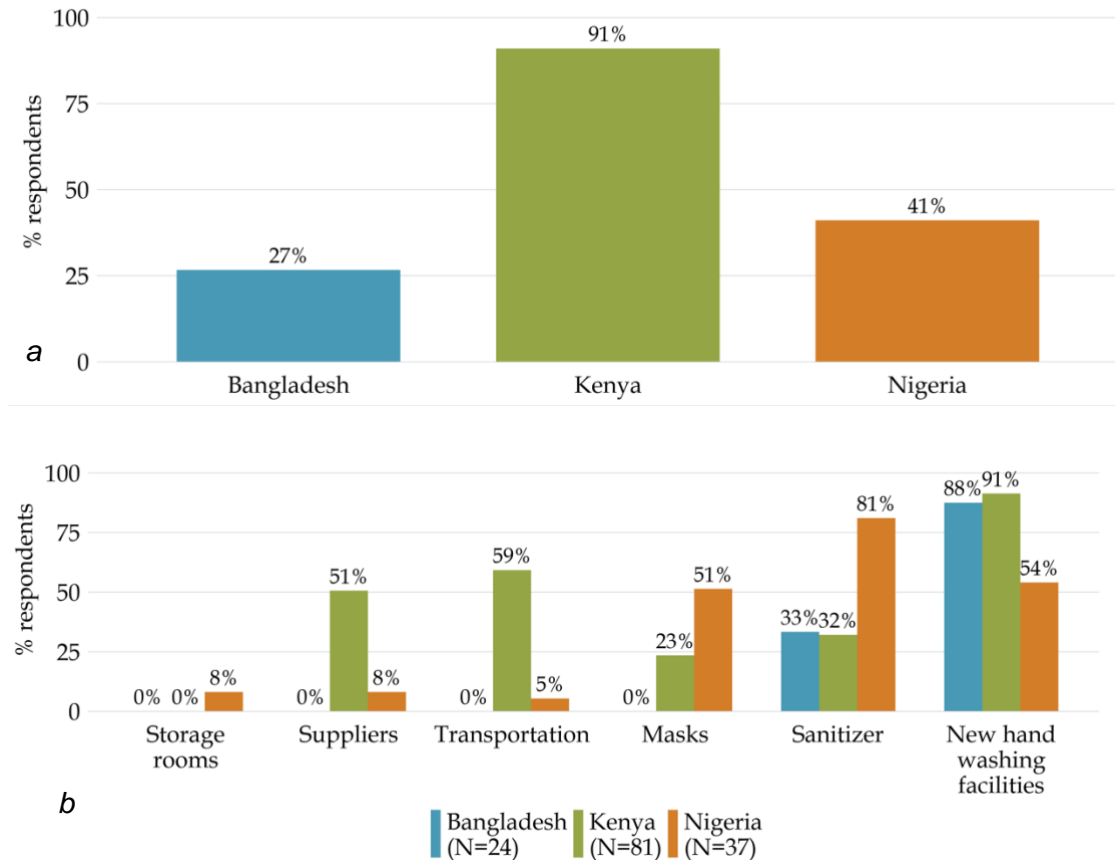


Figure 16. Share of vendors who reported sharing resources with other businesses (a) and types of resources shared by vendors (b)

6.4 BUSINESS STRATEGY

Business practices are oriented toward generating value for customers. They can be investments in understanding customers, in building customer relationships, in tracking customer retention and growth, in investing in staff and firm capacity, and in merit-based hiring. To measure business strategy, consumers were asked about market officials/vendors soliciting feedback (Figure 17). Of all the 3 countries, Nigeria seemed to do relatively well in market officials/vendors soliciting feedback from consumers (21%). In Bangladesh, no feedback was sought from consumers. In Kenya, 5% of the interviewed consumers were asked by market officials/vendors to provide feedback. Vendors were also asked about sources of funds loaned to them to cope with COVID-19 effects (Figure 18). The most common source in Kenya was informal cooperative (67%), relatives in Bangladesh (59%), and friends in Nigeria (38%). A surprising number of vendors in all three countries had access to formal bank loans (14-18%).

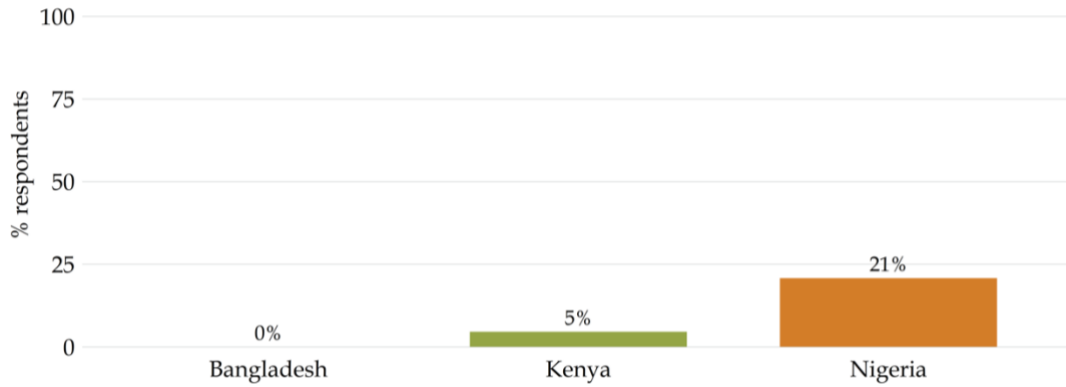


Figure 17. Proportion of consumers who were asked by market officials/vendors to provide feedback

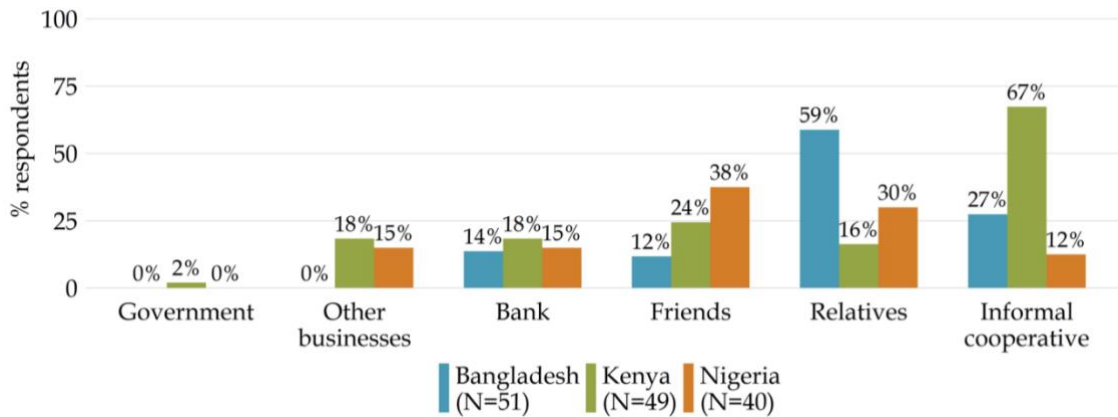


Figure 18. Source of vendor loans to cope with COVID-19 effects

Figure 19 shows the share of vendors that aim to continue with the same business despite the persistence of COVID-19. In Bangladesh and Nigeria, almost all vendors indicated that they would continue with the same business while in Kenya, 75% reported the same.

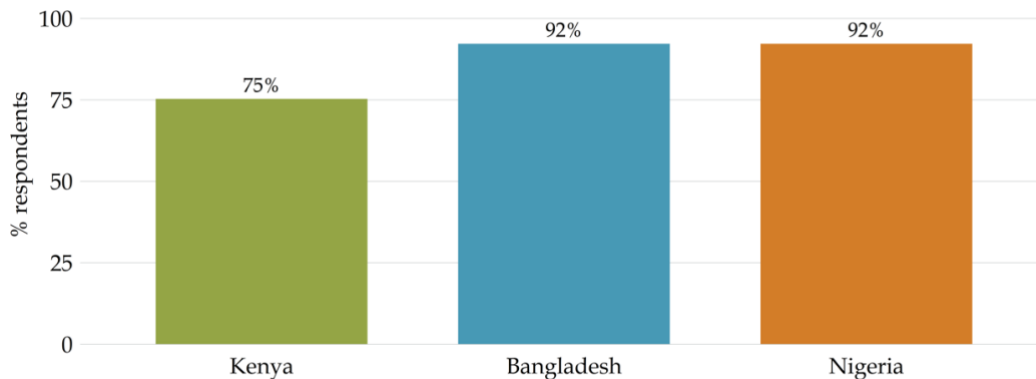


Figure 19. Share of vendors that will continue same business even if COVID-19 persists

7. CONCLUSIONS

Second year into the COVID-19 pandemic, Bangladesh, Kenya and Ethiopia saw rising cases by the end of the first quarter of 2021 whereas Nigeria experienced a decline in COVID-19 cases by end of March 2021. Despite some improvements in cases from last year, the pandemic's negative impacts on socio-economic indicators are still evident in these countries according to national statistics on key indicators. This work provides a unique perspective of the effects of the pandemic, delving into the perceptions and actions of vendors and consumers on the ground and over time.

Vendors' and consumers' attitudes and behaviors related to COVID-19 are presented for Bangladesh, Ethiopia, Kenya, and Nigeria. Both consumers and vendors took measures to ensure their mutual safety while they were in marketplaces. Most consumers surveyed practiced masking as the most common measure. Mask wearing for vendors, mask wearing for consumers and hand washing stations were the most useful measures to vendors, across all countries.

A large proportion of consumers in Nigeria, Ethiopia, and Kenya (44-63%) reported changing their shopping behaviors, in particular reducing the frequency of shopping and avoiding peak shopping hours. However, prevalence has decreased compared to last quarter, with the biggest decrease happening in Bangladesh. In Bangladesh only 14% of consumers report changed behaviors, down from 34% last quarter.

Perceived ongoing effects of COVID-19 on vendors' businesses were explored by type of difficulty (supply side and demand side) and by main commodities sold. Overall, demand-side difficulties were more prevalent than supply-side across countries, with the smallest gap in Ethiopia—where the prevalence of transportation and sourcing difficulties was higher than the other countries—and the largest gap in Bangladesh—where decreased sales and customers was ubiquitous. There were few discernible patterns across commodities, although most (50-68%) fruit and vegetable vendors in Ethiopia mentioned difficulties sourcing and transporting. And demand-side challenges were least prevalent for vendors of eggs and dairy in Nigeria (44-45%) and grains and legumes in Ethiopia (25-50%).

In the second half of the report, market resilience indicators are explored for Bangladesh, Kenya and Nigeria. This data provides a snapshot of resilience capacities for consumers and vendors. Most consumers in all three countries indicated that their finances were negatively affected by COVID-19. Losses of income sources were pervasive in all three countries, and Nigeria and Kenya reported rising prices as a common challenge.

In Bangladesh and Nigeria, consumers coped with these challenges largely with personal, family or close contact resources—relying to a great extent on own savings or borrowing from friends and family. It was more common in Kenya to decrease spending. A particularly concerning response is decreasing food consumption, which was mentioned by 29% of consumers in Kenya and 20% in Nigeria.

Prices, convenience, quality, and variety were the most common reasons for choosing their main market, across countries. In Bangladesh and Nigeria, when consumers shop elsewhere, it is usually a different traditional market. Whereas in Kenya, alternate food sources are varied: supermarkets are the most common alternative, followed by small shops, and kiosks. Customers

consider most, to a few, vendors to be trustworthy, with Bangladeshi consumers more trusting of vendors overall. Trust is largely driven by the extent to which a customer knows a vendor and the regularity of transactions.

A much higher proportion of vendors in Kenya share resources with other vendors, compared to Nigeria and Bangladesh. Furthermore, shared resources among vendors in Bangladesh and Nigeria are largely pandemic related, such as sharing of sanitiser and hand washing stations. In contrast, a larger proportion of Kenyan vendors report sharing essential business resources, namely transportation and suppliers of goods.

In summary, in addition to the health effects, the consumers and vendors report pandemic-related challenges to their livelihoods and, in some cases, food security. Consumers and vendors are taking precautions in markets to avoid contracting COVID-19. In response to the stresses they are facing, consumers and vendors apply a number of different strategies, including using savings, formal or informal loans, taking on additional income earning activities, and spending or eating less. The types of strategies taken are an indicator of the resilience capacities currently present. For instance, utilizing financial resources suggest greater resilience capacity than eating less food.

At the market level, considering resilience across the components presented and across countries provides useful contrast. Although considerable value will be added when we have sufficient data to consider these factors over time, it is useful to consider the relative strengths across countries. For instance, Bangladesh appears to excel in vendor trust and a larger set of customers. Kenya's vendors seem to be strong in business cooperation. Only in Nigeria were more than a handful of consumers asked for feedback on their shopping experience.

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