GeoPoll

Coronavirus in Sub-Saharan Africa

HOW AFRICANS IN 12 NATIONS ARE RESPONDING TO THE COVID-19 OUTBREAK

Contents

Introduction

The spread of COVID-19 poses a challenge for emerging markets such as those in Africa and Latin America. While governments around the world are suffering from a shortage of ventilators, hospital beds, and personal protective equipment, availability of these items is already extremely limited in some countries. In Africa, countries including Mali, Liberia, and Burkina Faso have only a few ventilators available to aid their populations, and there is also a lack of reliable oxygen supplies, ICUs, and healthcare workers to treat the sick. Additionally, many countries in Africa are already suffering from food insecurity and weak economies, which will worsen the long-term effects of coronavirus.

While some governments in Africa have been proactive about lockdowns in order to prevent the virus from quickly spreading through densely populated areas, coronavirus is already present in many African nations, and there is a fear that the worst is yet to come. As seen following the West African Ebola crisis, a health crisis such as coronavirus hitting vulnerable populations can result in devastating effects for both development and consumerism.

Keeping these factors in mind, GeoPoll conducted a remote study in 12 countries in sub-Saharan Africa on the effects coronavirus is already having on people throughout the region. The impact of the virus will have broad-reaching implications across all sectors, and while we could not cover every relevant topic in this study, we sought to use our experience conducting research for both international development groups and the consumer sector to include a wide range of topics. Areas that are covered in this study include:

- Biggest concerns and perceptions of risk surrounding coronavirus
- Preventative measures such as social distancing and handwashing practices
- Changes in food market operability and food security
- Changes in consumer habits, including purchasing of food and nonessential items
- Levels of trust in governments and the commercial sector
- Information sources on COVID-19 and changes in media consumption

We plan to run this study on an ongoing basis to see how perceptions and reactions to coronavirus, as well as consumer behavior and food availability, change over time. To view the interactive dashboard and subscribe to updates when new data is published, please visit this page.

Methodology

Research Modes

This study questionnaire was designed by GeoPoll and data collection occurred from April 2nd – April 9th, 2020, with some countries completing data collection earlier than others. The study was run through SMS and mobile web, in which a web link is sent through a text message and opened in a basic browser. These mobile-based modes were chosen in order to quickly and remotely collect data from populations with access to mobile phones. We utilized both modes in order to gather data from populations without access to smartphones/internet (through SMS) and wealthier, more urban populations (through mobile web) while balancing costs and other considerations. Some countries (Benin, DRC, Mozambique, Rwanda, Uganda, and Zambia) relied mostly on SMS due to lower internet penetration rates, and where mobile web was utilized no more than 50% of the sample was reached via mobile web.

Sample

For sampling, GeoPoll used a simple random sampling technique from GeoPoll's respondent database, a list of mobile subscribers in each country surveyed. The sample was nationally represented by age, gender and location (ADM1) and with a natural fallout of Living Standard Measures (LSM) in all markets. Slightly more males responded than females, with a gender split of 46% female to 54% male, and the age split was 24% ages 16-24, 41% ages 25-34, and 35% ages 35+. A total sample of 4,788 was collected across the 12 countries in Africa with each country having a sample of 400 except DRC, which had a sample size of 388. This gives a 5% margin of error and a 95% confidence interval. The survey was administered in English, French, Portuguese, Swahili, and Kinyarwanda dependent on country.

Benin
Côte D'Ivoire
Democratic Republic of Congo
Ghana
Kenya
Mozambique
Nigeria
Rwanda
South Africa
Tanzania
Zambia

While SMS surveys are generally able to reach wide portions of the population, the sample is made up of literate adults with access to mobile phones, and thus reaches wealthier populations than other modes such as Computer Assisted Telephone Interviewing (CATI). To request a country-by-country breakdown of the sample, please contact us at info@GeoPoll.com.
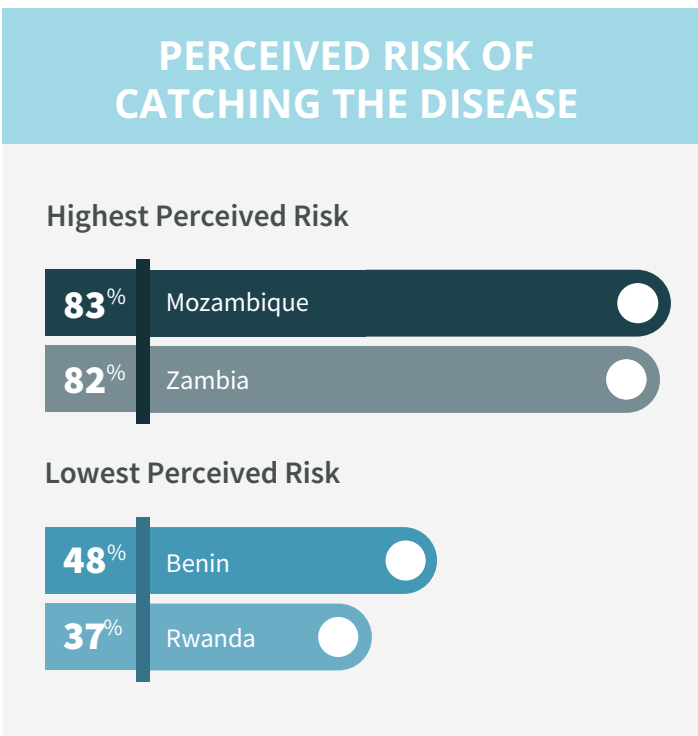
Results

Biggest Concerns

Level of concern over the coronavirus outbreak is high in all countries studied, with 72% overall reporting that they are 'very concerned' over COVID-19. A slightly lower percentage overall, 63%, believe that they or their families are at risk of contracting the disease, with this percentage being lowest in Rwanda and Benin, and highest in Mozambique and Zambia. The differences

72% of respondents indicated that they are very concerned over coronavirus

between perceptions of risk by country are likely due to the measures being taken by individual governments; Rwanda was the first nation in Africa to be placed on lockdown to prevent the virus' spread, and was also successful at preventing the spread of Ebola in 2019, while as recently as April 7th Zambia's government had rejected calls for a country-wide lockdown.

The long-term economic impact of coronavirus is also a concern across Africa, with the World Bank warning that sub-Saharan Africa is likely to experience its first recession in 25 years due to the pandemic. Countries such as South Africa and Kenya were already experiencing weak economies before the coronavirus outbreak, and will be hit hard by the restrictions and trickle-down effects related to COVID-19. The economic effects of COVID-19 will be felt even harder in these emerging economies due to their reliance on informal trade and exports of commodities that are falling in value.

PERCEIVED RISK OF CATCHING THE DISEASE

Highest Perceived Risk

83% Mozambique

82% Zambia

Lowest Perceived Risk

48% Benin

37% Rwanda

This study found that populations are aware of the looming economic crisis, with 71% stating that they are very concerned about the economic effects of coronavirus. Concerns over the economic impacts are highest in Mozambique and Rwanda. Additionally, 26% listed economic impacts as their biggest concern of the outbreak, only slightly behind the 27% who state that contracting the disease themselves is their biggest concern.

Preventative Measures

COVID-19 is unlike other crises as has led to country-wide shutdowns across the globe and a [sharp decline in international travel](#). While there were lockdowns during the [Ebola outbreak in West Africa](#), the widespread and prolonged nature of the current restrictions is unprecedented, and it is these preventative measures that are a major focus of many groups. In countries such as the ones studied in sub-Saharan Africa, large informal settlements, a reliance on public transit, and difficulties working from home make ['social distancing' measures unsustainable](#) at best.
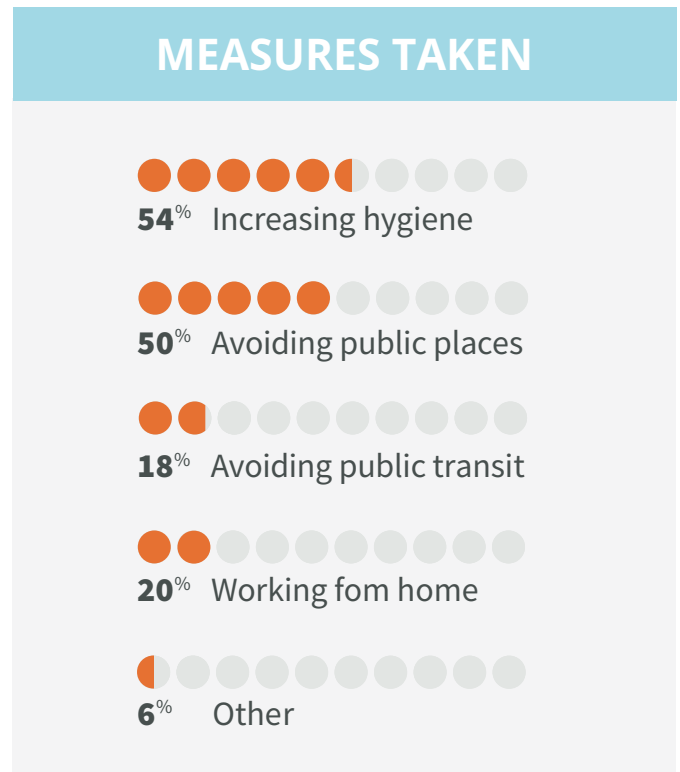
96% of respondents indicated that they have taken measures to protect themselves from coronavirus

In order to better understand what measures populations in the 12 countries studied are taking to prevent the spread of coronavirus, GeoPoll examined self-quarantining habits and other measures. We found that 96% reported they had taken measures to prevent themselves from contracting coronavirus. Increasing hygiene, which would include an increase in handwashing, was the most common measure being taken, with 54% total saying they had increased hygiene. Half are avoiding public places, one of the main culprits for spreading a highly-transmissible disease, but just 20% report that they are working from home and 18% are avoiding public transit.

We found that, of the sample reached, handwashing frequency was quite high, with 56% reporting that they are washing their hands with soap and water more than 5 times a day. Just 5% total report that they are washing their hands zero times per day. While there are mixed statistics on handwashing behaviors in sub-Saharan Africa, often dependent on availability of water and soap, there have been efforts to install handwashing stations in vulnerable areas such as the Kibera slums in Kenya. These efforts along with increased communication on the importance of handwashing surrounding coronavirus could explain our findings, although they may also be partly due to a self-reporting bias.

MEASURES TAKEN

54% Increasing hygiene

50% Avoiding public places

18% Avoiding public transit

20% Working fom home

6% Other

The study also looked specifically at self-quarantining, when an individual or family stays at home except for essential tasks such as purchasing food or seeking medical care. In total we found that a quite high percentage, 70%, say they are self-quarantining. However, this varies by country; 91% of those in South Africa and 90% of those in Rwanda, which are both under government-mandated lockdowns, are quarantining, while in Benin and Tanzania only 57% and 58% respectively are staying home. Healthcare-seeking behavior is a topic that has been studied at length, especially among populations in sub-Saharan
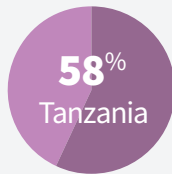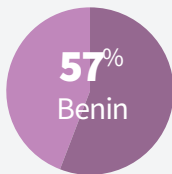
SELF-QUARANTINING MEASURES

70% respondents overall are self-quarantining

Highest levels of self-quarantining

91% South Africa

90% Rwanda
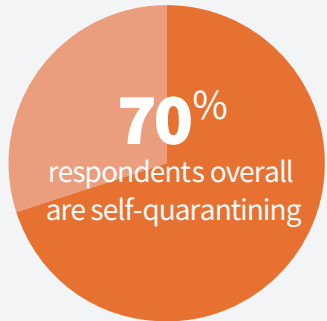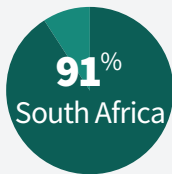
Lowest levels of self-quarantining

57% Benin

58% Tanzania

Africa who may not have an easily-accessible doctor or want to seek formal healthcare. While much about COVID-19 is not yet understood, as there is no cure those with mild cases are being advised to treat themselves at home unless they develop severe symptoms such as trouble breathing. Despite this guidance, we found that 58% of respondents would go to a hospital if they had mild coronavirus symptoms, while only 12% said they would stay home. This figure did change by country, with 30% of those in Rwanda, 19% of those in South Africa, and 21% Ghana saying they would stay home, while in Tanzania 82% and Kenya 77% indicated they would go to the hospital. This may indicate differing communications and treatment recommendations by country.
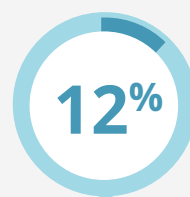
HEALTHCARE SEEKING BEHAVIOR

What would you do if you showed mild signs of coronavirus?

58%
Go to a Hospital

25%
Go to a Doctor
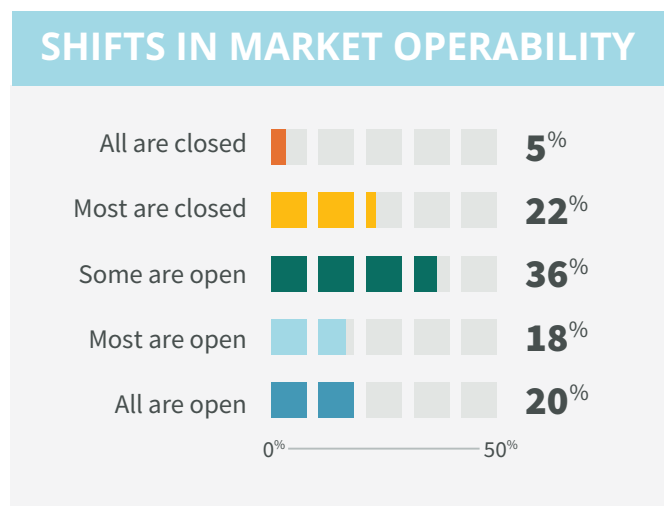
12%
Stay Home

5%
Not Sure

Changes in Food Availability and Food Security

One of the greatest concerns surrounding the coronavirus outbreak is the impact it will have on food security, especially in countries that

80% of respondents reported that within the last 7 days they were worried they would not have enough food to eat

already suffer from high food insecurity. The United Nations' Food and Agriculture Organization has already warned of an [impending food crisis](#) if actions are not taken to protect supply chains and distribute food to vulnerable populations. We found that respondents are already concerned about having enough to eat: 80% reported that within the 7 days before the survey they had been worried about not having enough food to eat due to lack of money or other resources. This figure was highest in the DRC (88%), Rwanda (87%) Kenya (86%) and Uganda (86%).

SHIFTS IN MARKET OPERABILITY

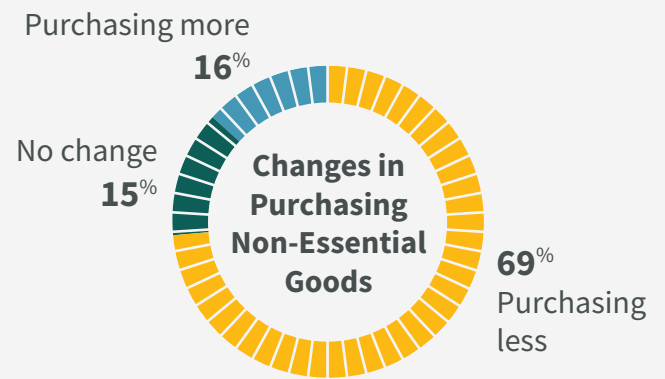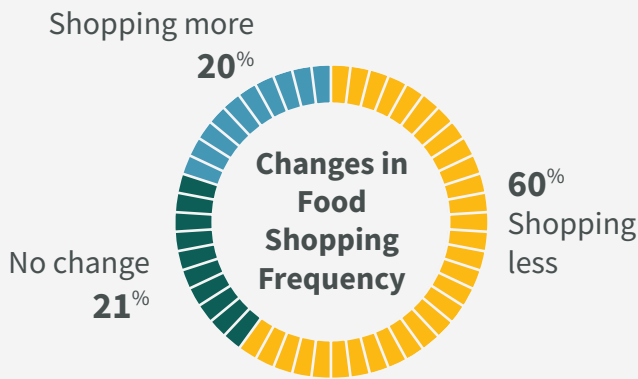| Category	Percentage
All are closed	5%
Most are closed	22%
Some are open	36%
Most are open	18%
All are open	20%

0% —————— 50%

Food markets in some areas have been [closing to prevent the spread of coronavirus](#), and we found this is the case in most areas, with only 20% overall saying that all of the markets or stores where they usually purchase food are open, with the largest group, 36% reporting that some markets are open. Interestingly, respondents are almost evenly split on changes to their food purchasing location, with 49% saying they have not changed where they purchase food, and 51% saying they have changed their food purchasing locations. This is in line with the findings that some markets are still open. Of those who have changed their food-purchasing location, most are now going to supermarkets.

We also find that food purchasing habits have changed in other ways; 60% say they are shopping for food less often than usual, and 42% say they are buying bigger pack sizes when they do shop for food. Of the 80% who reported they were worried about having enough food to eat, a majority, 72%, said they will switch to an alternative brand that is cheaper rather than purchasing their usual brand.

Shopping more
20%

Changes in Food Shopping Frequency

60% Shopping less

No change
21%

Purchasing more
16%

No change
15%

Changes in Purchasing Non-Essential Goods

**69**% Purchasing less

Consumer and Brand Behavior

In addition to the changes in food purchasing behavior, we also examined changes in purchasing of non-essential items. Due to the worry over economic impacts of coronavirus, in conjunction with restrictions on movements, retailers and brands are bracing for a sharp decrease in sales. In China, where the virus originated, retail sales are down by over 20% this year, and US retailers are also experiencing downturns due to shuttered storefronts and lowered demand for non-essential goods.

Our study in sub-Saharan Africa confirmed retailers' worries: A majority of respondents, 69%, reported that their purchase of non-essential items such as beauty products and clothing had decreased due to coronavirus. Females were slightly more likely than males to report that their purchase of non-essential items had decreased (71% of females vs 67% of males) although this may be due to females purchasing more non-essential items during normal times.

Many brands and retailers are now shifting their attentions to corporate social responsibility causes, and moving their planned advertising budgets towards humanitarian efforts. International brands including Coca Cola, Nike, and McDonalds have put out ad campaigns encouraging social distancing, while fashion labels are now producing masks, and car manufacturers are moving to make ventilators. We found that, in the countries studied, respondents were most likely to think that telecommunications companies and banks have done their part to stop the spread of coronavirus out of the listed options. This is likely due to banks in countries including Ghana cutting interest rates and introducing measures to encourage lending, while some telecommunications companies and associated mobile money entities are reducing fees and

PARTIES RESPONSIBLE FOR ASSISTING DURING THE OUTBREAK

86% Governments
70% NGOs
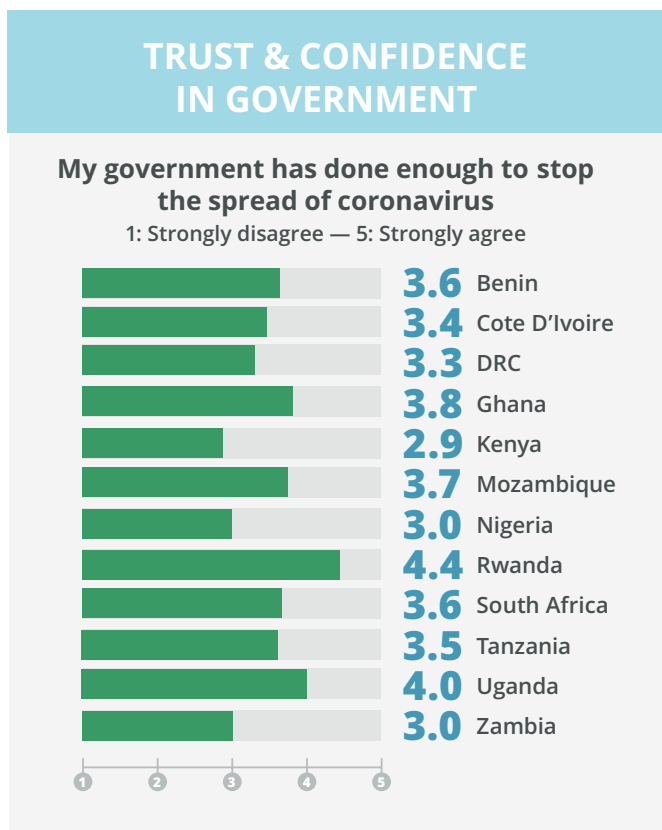**66**% Private Sector
60% Retailers
60% Brands
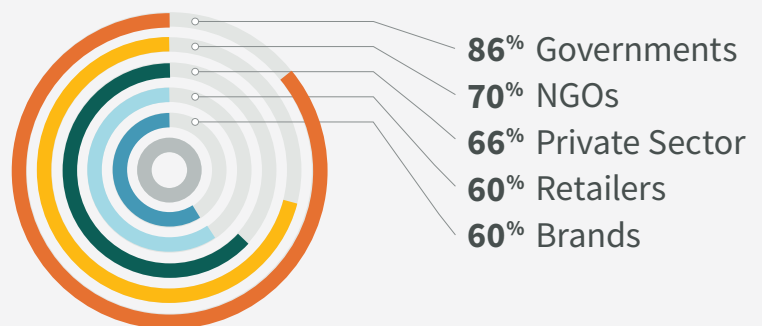
introducing new data bundles during this time.

Of the initiatives that in-person businesses have taken to protect customers, the most common measures were offering sanitizer, limiting store traffic, and staff wearing protective gear. These measures were least likely to be taken in stores in Mozambique, where 19% stated no measures had been taken. Limiting store traffic was most prevalent in South Africa, Mozambique, Rwanda, and Tanzania.

Government Trust

The governments in the 12 countries studied have taken a variety of actions to prevent the spread of coronavirus. As of April 13th, Rwanda, Uganda, and South Africa are under nationwide lockdown measures, while Benin, Ghana, Kenya, DRC, Cote D'Ivoire, and Nigeria are experiencing partial lockdowns in key areas. Tanzania, Zambia, and Mozambique have so far resisted calls for wide lockdown measures. The rollout of these measures has been mixed, with reports of violence in countries including Kenya and South Africa as curfews and lockdowns are enforced. These mixed measures and messages contribute to a range of responses seen around government actions.

**TRUST & CONFIDENCE
IN GOVERNMENT**

My government has done enough to stop the spread of coronavirus
1: Strongly disagree — 5: Strongly agree

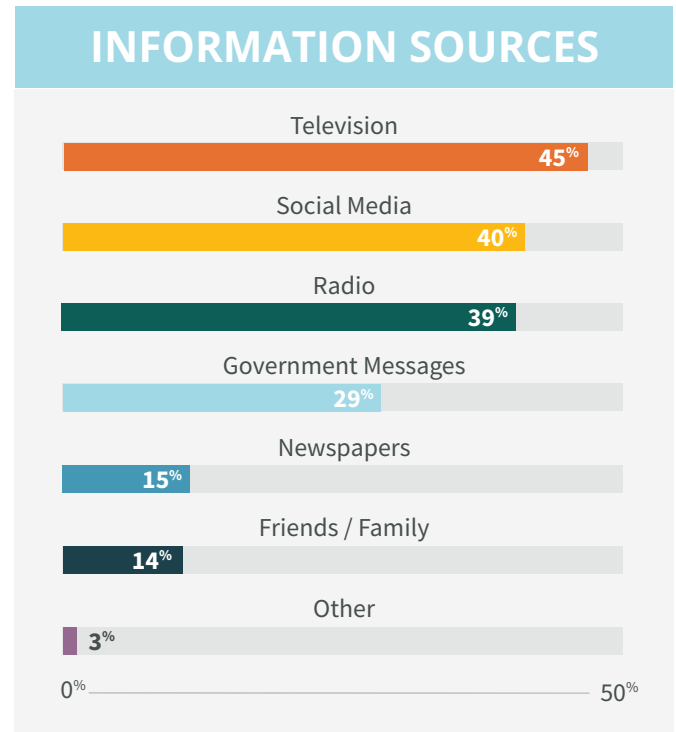|	
3.6	Benin
3.4	Cote D'Ivoire
3.3	DRC
3.8	Ghana
2.9	Kenya
3.7	Mozambique
3.0	Nigeria
4.4	Rwanda
3.6	South Africa
3.5	Tanzania
4.0	Uganda
3.0	Zambia

Responses to the statement 'My government has done enough to stop the spread of coronavirus' vary widely among country and within countries, with respondents in some countries split between 'strongly agree' and 'strongly disagree'. The Democratic Republic of Congo and Zambia had the highest portion of respondents who strongly disagreed that their government was doing enough, at 32 and 31% respectively, although responses were quite split in DRC, with 51% strongly agreeing with the same statement. Governments that were rated the highest on this measure were Rwanda, with 81% strongly agreeing that they had done enough to prevent coronavirus, and Mozambique, with 59% strongly agreeing.

Countries where respondents were more split on this statement include Kenya, DRC, Nigeria, and Zambia. Overall, we found that females were more likely to agree that their countries were doing enough, with 52% of males and 58% of females giving agreeable scores. The middle age group, from ages 25-34, were less likely to strongly agree that their government was doing enough to prevent coronavirus' spread than those younger and older.

Sources of Information and Media Consumption

Coverage of coronavirus has dominated the media, and at the same time there have been reports of [misinformation around the virus spreading](), particularly through social media channels and messaging platforms such as WhatsApp. We found that TV is the most common information source for coronavirus-related news, with 45% saying that TV is a source of information, but that social media was close behind, with 40% getting information from social media. For those aged 35 and older, social media was slightly less likely to be an information source, cited by 37%. Of those who get information from social media, 46% are turning to media outlets, 22% to health organizations, 15% to governments, and 14% to friends/family.

INFORMATION SOURCES

Television **45%**

Social Media **40%**

Radio **39%**

Government Messages **29%**

Newspapers **15%**

Friends / Family **14%**

Other **3%**

0%   50%

We also found that media consumption habits have changed in general due to the coronavirus outbreak. In Kenya, [GeoPoll Audience Measurement's ratings data]() found that average TV viewership was up overall in between the hours of 6am – 12pm, while radio listenership during the same time period declined. We also observed a move of TV audiences away from entertainment channels and towards news channels, likely driven by a desire to stay informed on COVID-19. In this study, we also found that media consumption is up, with 66% saying they are consuming more media, compared to 15% who are consuming less, and 20% who report no change in media consumption.

MEDIA CONSUMPTION

Consuming less
15%

No change
20%

Changes in Media Consumption

66%
Consuming more
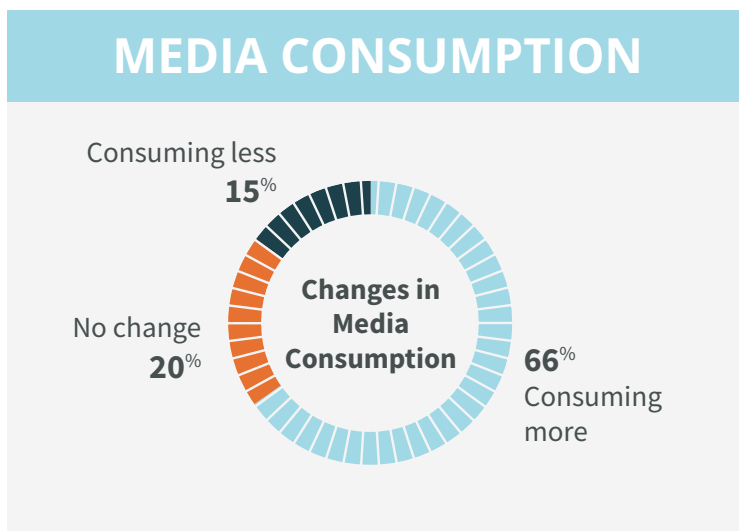
Conclusion

Our study demonstrates the high levels of fear around coronavirus and related impacts throughout sub-Saharan Africa. Although many countries in Africa have only reported a small number of cases, there is a high level of fear surrounding the outbreak; The level of concern is high across all countries, and a majority also believe that they themselves are at risk of contracting the disease. Food security and the economic impacts of the disease on economies that have already been struggling are at the top of mind for many people, aligning with warnings from experts that sub-Saharan Africa could experience high levels of food insecurity and an economic recession due to the virus.

These factors are compounded by mixed levels of trust in governments to handle the disease outbreak. In countries that have taken decisive action against the spread of coronavirus, such as Rwanda, populations are more likely to report high confidence in their government. In countries such as Kenya, where one survey found that 68% support a nationwide lockdown, and Zambia, which has stated that a lockdown is not yet necessary and would result in widespread hardship, levels of confidence in the government are much more mixed. Governments around the world are balancing the economic and humanitarian impacts of government-mandated lockdowns against the potential loss of life due to the virus itself, and this balance is especially difficult in emerging markets such as those in sub-Saharan Africa.

Even as governments weigh country-wide actions, one thing that has been evident is the responsibility individuals themselves are taking on to prevent the virus from spreading. Even some developed nations are relying on societal pressure to encourage so-called 'social distancing' or 'self-quarantining' measures among wide swaths of the population. We have also found this to be the case in the sub-Saharan African countries studied, with almost all respondents stating they have taken some preventative measures against the virus' spread, and a majority stating that they are currently self-quarantining. Despite the difficulties that many will face due to quarantining measures, our study finds that the danger of the disease has been made clear, and people around the world are acting to stop the its spread.

While the spread of COVID-19 is still in early stages in many of the countries studied, it is already having a large impact on economies, food security, and consumer behavior. Brands and advertisers have reduced advertising spend, and will be closely examining the changes in consumer behavior seen as a result of coronavirus. This study confirmed that the COVID-19 outbreak has already resulted in changes around consumer behavior, with many people shopping for food less often, and prioritizing essential goods at low prices over brand loyalty and non-essential items. How long these new consumer habits will be in place will depend on both official restrictions and consumer's confidence in their ability to safely return to pre-coronavirus patterns.

As coronavirus continues to spread throughout sub-Saharan Africa it will result in more lockdowns, changes in food security, and economic declines. While much of the world's attention in recent weeks

has been on the high number of cases in developed countries including Italy and the United States, coronavirus could have a devastating effect on those in sub-Saharan Africa, Latin America, and other emerging regions. In order to better understand the effects of the virus more on-the-ground feedback is needed. By conducting studies like this one through safe, remote methods of data collection, governments, development organizations, and consumer businesses can better prepare themselves for what is to come.

Over the coming weeks GeoPoll will be collecting more data on coronavirus' impact in sub-Saharan Africa and other regions and releasing results publicly. We are also partnering with other organizations to assist them in gathering vital information remotely from populations around the globe. To view the full dashboard of results from this study and stay updated on future GeoPoll initiatives around coronavirus, please visit our **coronavirus resources page**.

About GeoPoll

GeoPoll is a leader in providing fast, high quality research from areas that are difficult to access using traditional methods. Using mobile-based, remote methodologies including SMS, voice calls, and online modes, GeoPoll facilitates projects that aid in disaster response, assess food security, demonstrate demand for new projects, and more around the world.

GeoPoll combines a robust mobile surveying platform that has the ability to conduct research via multiple modes with a database of over 250 million respondents in emerging markets around the globe. Strengths lie in GeoPoll's ability to target extremely specific populations, deploy surveys in multiple countries, and provide expert guidance on how to collect accurate, reliable data through the mobile phone. For more information visit **www.GeoPoll.com**.

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