



Consumer Preferences Study in Regards to Organic, Clean and Safe (Agroecological) Agri-Food Products in the Greater Mekong Sub-region

Consumer Survey in Yangon, Mandalay, Nay Pyi Taw and Taunggyi in Myanmar

**Dr. Theingi Myint, Professor
&
U Aung Phyoo, Assistant Lecturer
Department of Agricultural Economics,
YAU, Myanmar**

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Introduction

- Food consumption patterns are changing as a result of increasing incomes, as well as growing health and environmental issues.
- In the Greater Mekong Sub-region (GMS), the shift from traditional farming systems to commercial agriculture has already translated into a unbridled and unsustainable use of chemicals.
- Analyses conducted on the fresh vegetables sold in various markets in the GMS show that a significant proportion of samples contained pesticide residues, sometimes above accepted safety levels.
- In each country, organic and safe vegetable initiatives are developed through specific mechanisms (*e.g.*, private brands, certifications, short value chains, etc.), and with the involvement of different stakeholders from both the public and the private sector

Introduction

- The rapid development of organic and safe agriculture initiatives at the regional level thus calls for a technically rigorous survey of consumer perceptions and consumption patterns to better understand how these initiatives can be further supported and promoted at both the country and the regional level.
- Such a survey may also provide valuable information to governments willing to fine-tune their policies aimed at supporting and accompanying the involvement of smallholder farmers into high-value and sustainable value chains for domestic and regional markets in the perspective of the AEC (a potential market of 620 million people).
- This is especially true given the lack of official policy framework supporting organic agriculture in Vietnam and Myanmar for instance.

Research Objectives

The general objective

- ✚ to understand the current knowledge, perceptions, attitudes and behaviors of consumers towards organic/clean/safe food in Myanmar and to contribute to a general understanding across the GMS

The ultimate objectives

- to identify the determinants of consumer behavior towards organic/clean/safe/agroecological food products, and
- to better assess how consumer behavior regarding organic/clean/safe/agroecological products changes over time and space, in order to define relevant policy recommendations for the promotion of organic/clean/safe/agroecological agriculture

Research Questions

- ➡ How is food quality perceived by the consumers?
 - ➡ What are the important food quality attributes for the consumers?
 - ➡ Who and what do consumers trust when it comes to food quality?
 - ➡ What are the consumers' current food-related practices (e.g., eating out/at home, cooking and purchasing)?
- The main target group was consumers from different locations (in house, in conventional markets and organic markets, specialized shops, supermarkets, etc.).
- Extensive information about the socio-demographic characteristics (gender, age, household size and composition, level of education, type of job, personal income, and marital status) of the respondents was also collected.

Enumerator Training at Nay Pyi Taw, From 2nd to 5th November 2017

- A four-day intensive training aimed at fine-tuning the questionnaire, checking and correcting the translation, and training the enumerators on the use of the questionnaire, the use of tablets, etc.
- The training involved:
 - 20 enumerators (students from YAU),
 - 5 fieldwork supervisors from the Department of Agricultural Economics of YAU,
 - An ICT specialist from YAU,
 - Mrs. Theingi Myint (YAU),
 - Charlotte Ravaux (GRET),
 - Isabelle Vagneron (CIRAD) and
 - U Htet Kyu (GRET).

Enumerator Training at Nay Pyi Taw, From 2nd to 5th November 2017

- During the training, time was spared for the enumerators to test the questionnaire with a convenience sample of consumers in Nay Pyi Taw.
- The questionnaires were then reviewed together with the enumerators for final improvements and discussion of the problems encountered (including vocabulary issues).



Enumerator Training at Nay Pyi Taw, From 2nd to 5th November 2017

Table 1 Organization of training session in Myanmar

DAY 1	<ul style="list-style-type: none"> ▪ Training of the enumerators: <ul style="list-style-type: none"> - Share & discuss the questionnaire (e.g., read, explain, discuss each question), - Correct and simplify the questionnaire based on feedback. ▪ Adjusting the translation. ▪ Uploading new questionnaire onto tablets and checking inconsistencies ▪ Registering, preparing and distributing the tablets to the enumerators
DAY 2	<ul style="list-style-type: none"> ▪ Training & adjusting the questionnaire ▪ Elaborating Choice Modeling Scenarios and design of CM material ▪ Specific training about the Choice Modeling ▪ First testing of questionnaires by the enumerators (target: 2 questionnaires each)

Enumerator Training at Nay Pyi Taw, From 2nd to 5th November 2017

Table 1 Organization of training session in Myanmar

DAY 3	<ul style="list-style-type: none"> ▪ Feedback from enumerators on questionnaires (difficulties encountered) ▪ Pilot testing of questionnaires (target: 1 questionnaire each)
DAY 4	<ul style="list-style-type: none"> ▪ Final feedback from enumerators on questionnaires ▪ Final sampling defined (list of districts and number of questionnaires per district)



Choice Modeling





- In Myanmar, the choice modeling was carried out for water morning glory only.
- The design of the choice modeling was drafted by Damien Jourdain (CIRAD).
- Each consumer who mentioned purchasing water morning glory was presented six plasticized sets of three scenarios (hence each consumer saw 18 scenarios).
- Each set presented a different type of water morning glory, which was described by different combinations of five main attributes.
- Consumers were asked to choose the water morning glory they were the most/least willing to purchase.
- Enumerators wrote the answer on the tablets.

Table 2 Choice Modeling attributes for water morning glory in Myanmar

Attribute	Attribute levels	Description
PRICE	PRICE01 (same price)	Price of product (Unit: MMK/batch)
	PRICE02 (+10%)	
	PRICE03 (+20%)	
	PRICE04 (+30%)	
	PRICE05 (-20%)	
	PRICE06 (-10%)	
ORIGIN	ORIGIN01 (countryside)	Place where the product was grown
	ORIGIN02 (peri-urban)	
	ORIGIN03 (unknown)	
LABEL	LABEL01 (no label)	Food quality standard & certification
	LABEL02 (chemical-free)	
FRESH	FRESH01 (1 day ago)	Day of harvest
	FRESH02 (2 days ago)	
	FRESH03 (3 days ago)	
DISTANCE	DIST01 (+25 mn)	Extra time the consumer is willing to spend compared to current time spent (Unit: minutes)
	DIST02 (-20 mn)	
	DIST03 (+45 mn)	

Choice Modeling

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ရွေးချယ်ယူမှု	ကန်စွန်းရွက် ၁	ကန်စွန်းရွက် ၂	ကန်စွန်းရွက် ၃
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စူးဆွတ်ခြင်း	စူးပြီး ၃ ရက်ကြာ	စူးပြီး ၁ ရက်ကြာ	စူးပြီး ၂ ရက်ကြာ
ဝယ်ယူညှိနှိုင်းမှုအခွင့်အလမ်း	နီးသည် 	အကွာအဝေးတူသည်	အကွာအဝေးတူသည်
ဈေးနှုန်း	၁၀%ဈေးကြီး	ဈေးမကွာ	၂၀%ဈေးချို
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မကြိုက်ဆုံး	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

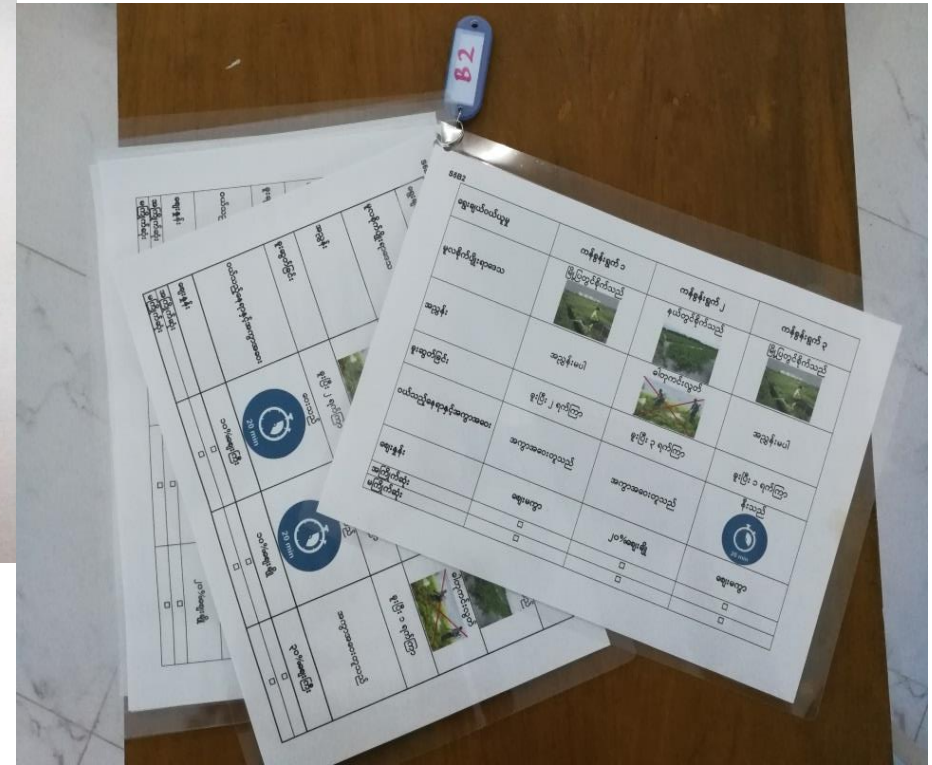


Figure 1 Choice modeling sets for Myanmar

Sampling

- The target - population of urban consumers of Myanmar
- Two major cities of Myanmar: Yangon and Mandalay as well as two secondary towns: Nay Pyi Taw and Taunggyi
- Purposive sampling was implemented based on the following criteria:
 - ❖ **Household monthly income level**

There are three income levels:

 1. poor (under 300,000 MMK per month)
 2. medium (300,000 - 1,000,000 MMK per month)
 3. rich (above 1,000,000 MMK per month)
 - ❖ **Districts/residential areas**
 - 🇲🇲 Inside each selected residential area, the consumers were surveyed individually and randomly selected in different selected market places (wet market, supermarket and convenience store).

Table 3 Sampling for the survey for different areas and shopping outlets in Yangon

Name of city	Name of township	Type	Number	Wet market	Super-market	Convenience store	Total
Yangon	Lanmadaw	Rich	1	1	0	0	55
		Middle	32	18	9	5	
		Poor	22	13	5	4	
	Dagon Myothit (North)	Rich	6	2	3	1	64
		Middle	36	29	2	5	
		Poor	22	19	1	2	
	Dala	Rich	2	1	0	1	80
		Middle	30	21	0	9	
		Poor	48	44	0	4	
	Yangon Total	Rich	9	4	3	2	199 (100%)
Middle		98	68	11	19		
Poor		92	76	6	10		
		199	148 (74%)	20 (10%)	31 (16%)		

Table 4 Sampling for the survey for different areas and shopping outlets in Mandalay

Name of city	Name of township	Type	Number	Wet market	Super-market	Convenience store	Total
Mandalay	Chanayetharzan	Rich	21	14	7	0	59
		Middle	30	25	2	3	
		Poor	8	6	0	2	
	Chanmyatharzi	Rich	8	2	6	0	67
		Middle	42	35	3	4	
		Poor	17	15	0	2	
	Patheingyi	Rich	1	0	0	1	57
		Middle	24	15	0	9	
		Poor	32	29	0	3	
	Mandalay Total	Rich	30	16	13	1	183 (100%)
		Middle	96	75	5	16	
		Poor	57	50	0	7	
		183	141 (77%)	18 (10%)	24 (13%)		

Table 5 Sampling for the survey for different areas and shopping outlets in Nay Pyi Taw

Name of city	Name of township	Type	Number	Wet market	Super-market	Convenience store	Total
Nay Pyi Taw	Zeyarthiri	Rich	1	1	0	0	32
		Middle	13	12	0	1	
		Poor	18	16	1	1	
	Pyinmana	Rich	1	1	0	0	40
		Middle	19	16	1	2	
		Poor	20	18	0	2	
	Ottarathiri	Rich	2	1	1	0	36
		Middle	13	6	7	0	
		Poor	21	18	3	0	
	Nay Pyi Taw Total	Rich	4	3	1	0	108 (100%)
		Middle	45	34	8	3	
		Poor	59	52	4	3	
		108	89 (82%)	13 (12%)	6 (6%)		

Table 6 Sampling for the survey for different areas and shopping outlets in Taunggyi

Name of city	Name of township	Type	Number	Wet market	Super-market	Convenience store	Total
Taunggyi	Hopone	Rich	0	0	0	0	40
		Middle	8	4	0	4	
		Poor	32	32	0	0	
	Yeayekwin	Rich	6	4	2	0	44
		Middle	33	29	1	3	
		Poor	5	5	0	0	
	Kyaungkyisu	Rich	1	0	0	1	35
		Middle	26	24	0	2	
		Poor	8	8	0	0	
	Taunggyi Total	Rich	7	4	2	1	119 (100%)
		Middle	67	57	1	9	
		Poor	45	45	0	0	
		119	106 (89%)	3 (3%)	10 (8%)		

Table 7 Total sampling for the survey for different areas and shopping outlets

Total	Type	Number	Wet market	Super-market	Convenience store	Total
Total for four cities	Rich	50	484 (80%)	54 (9%)	71 (11%)	609 (100%)
	Middle	306				
	Poor	253				
		609				



Thanks for your kind attentions!

