CONSUMER SURVEY OF ATTITUDES AND PREFERENCES TOWARDS ORGANIC PRODUCTS IN EAST AFRICA

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Introduction

- The consumer survey is one of the output under OTEA project
- The 2018 survey is based on the earlier surveys conducted in the region with the same objective and methodology.
- Report provides a comparison of the findings of 2006, 2013 and 2017 in order to better illustrate the dynamics of the organic sector and its growth challenges

Aim of the survey

- Identify the consumers' attitude towards organic agriculture in recognition of the mark, awareness of organic agriculture and consumption of organic products
- Analyze the promotional materials from each partner that carried out most effective and influential messages leading to desired results
- Provide recommendations for consumer awareness future strategies

Research methodology

- Qualitative and quantitative methodologies
- Quantitative quotas made based on age and sex
- Sampling points distributed based on probability proportionate to size (PPS) in all the cities
- Key informants purposively selected based on knowledge

Survey instruments

- Questionnaire
- Key informant screener I (Hotels, Restaurants, Supermarkets and Greengrocers)
- Key informant screener II (Hospitals and universities)
- Key informant discussion guide I
- Key informant discussion guide II
- Data was collected using survey to Go mobile app.

Key informants interviewed

	Kenya	Uganda	Tanzania	Rwanda	Burundi
Supermarkets	6	1	6	1	6
Green Groceries	4	2	4	1	4
Hotels/Guest houses	4	0	4	8	4
Restaurants	4	1	4	3	4
Hospitals	3	0	4	1	4
Universities	2	0	2	1	2
Organic markets	2	4	4	2	4
Total	25	8	28	17	28

Data processing

- Analysis using SPSS to produce a clean data file
- Qualitative survey was analyzed through Comparison grid for different sets.

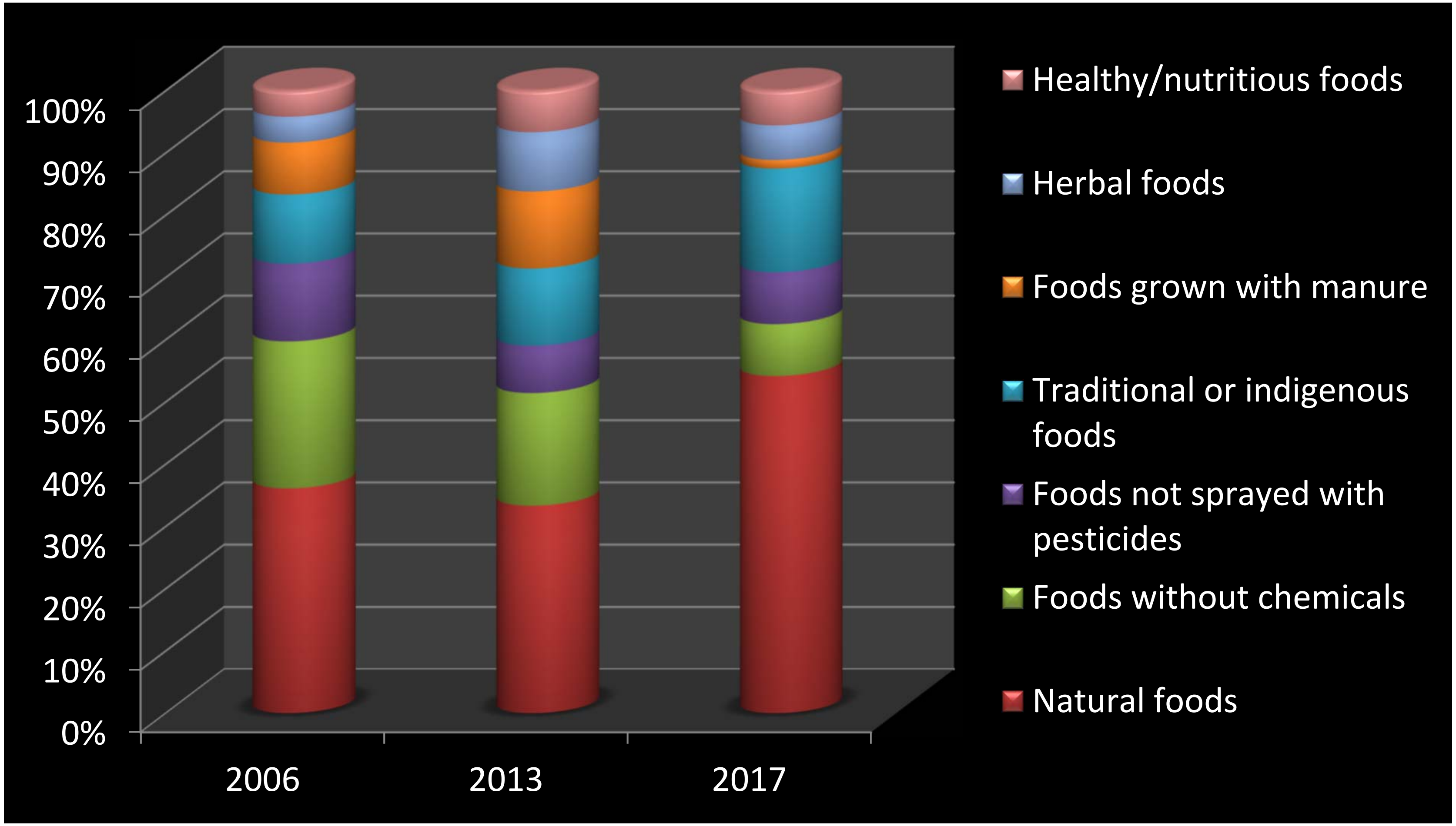
Results

Awareness

		Base Total	Country				
			Kenya	Tanzania	Uganda	Rwanda	Burundi
Base Total		896	211	205	249	123	108
	Natural foods	39%	29%	20%	58%	45%	48%
	Herbal foods	6%	1%	7%	11%	4%	4%
	Foods grown with manure	6%	9%	4%	6%	9%	5%
	Foods without chemicals	12%	17%	3%	10%	27%	6%
	Foods not sprayed with pesticides	1%	0%	1%	2%	2%	0%
	Traditional / indigenous foods	4%	6%	5%	3%	2%	6%
	Healthy / nutritious foods	4%	1%	3%	5%	7%	2%
	Don't know / not sure /others	27%	37%	58%	5%	3%	31%
	Total	72%	63%	43%	95%	96%	71%

Awareness level across all countries is currently at 39%, an improvement by (4%) compared to 2013.
Awareness was higher amongst male (42%) compared to female (36%), and is higher in the higher SECs (ABC1 (44%) compared to lower socio-economic classes (E-24% and C2D-34%)

Comparison 2006,2013,2017

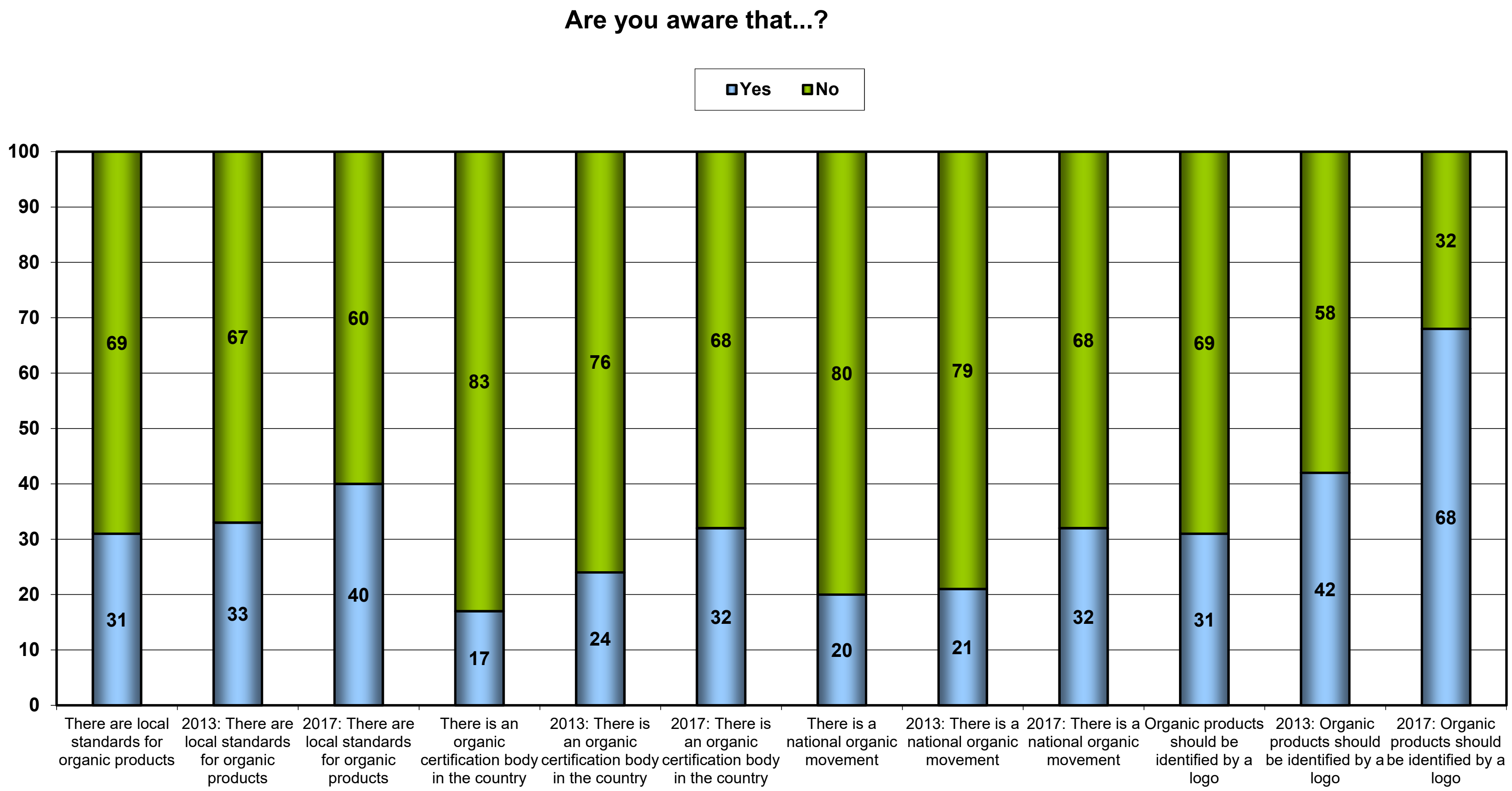


Source of information about organic foods

	NATURAL FOODS	FOODS WITHOUT CHEMICALS	FOODS NOT SPRAYED WITH PESTICIDES	TRADITIONAL OR INDIGENOUS FOODS	FOODS GROWN WITH MANUIRE	HERBAL FOODS	HEALTHY / NUTRITIOUS FOODS
BASE (n =)	352	237	87	134	127	129	132
Percent	100%	100%	100%	100%	100%	100%	100%
Word of mouth	26%	32%	26%	51%	19%	24%	25%
Taught in school / college	30%	35%	38%	19%	41%	23%	38%
Television programmes /adverts	25%	15%	25%	16%	20%	26%	31%
Radio programmes / adverts	16%	17%	20%	13%	14%	30%	23%
Books	11%	15%	17%	7%	13%	12%	15%
Don’t know / not sure	7%	3%	2%	3%	4%	5%	3%
Newspaper	13%	8%	14%	7%	12%	12%	14%
Magazines	8%	8%	14%	6%	6%	7%	15%
At a promotional / educational event	5%	6%	11%	7%	2%	5%	9%
Internet / Social Media	12%	10%	9%	4%	3%	5%	11%

The findings in 2017 reveal that word of mouth, teachings at school/college, and TV are the strongest. A difference worth noting for 2017 is internet/social media as a source of information which previously was not mentioned in the earlier surveys.

Knowledge of facts about organic foods



It is evident that there has been steady increase in awareness of organic facts across all countries from 2006 to 2017

Usage of organic products

- Consumption has improved by 10% (49 to 59%) from 2013
- There was a drop in consumption of the all categories of foods presented from 2013 to 2017 across all the countries.
- This is a concern since it may imply that the gains made of converting awareness into usage in 2013 from 2006 have been lost in 2017. But may also mean emergence of new food categories

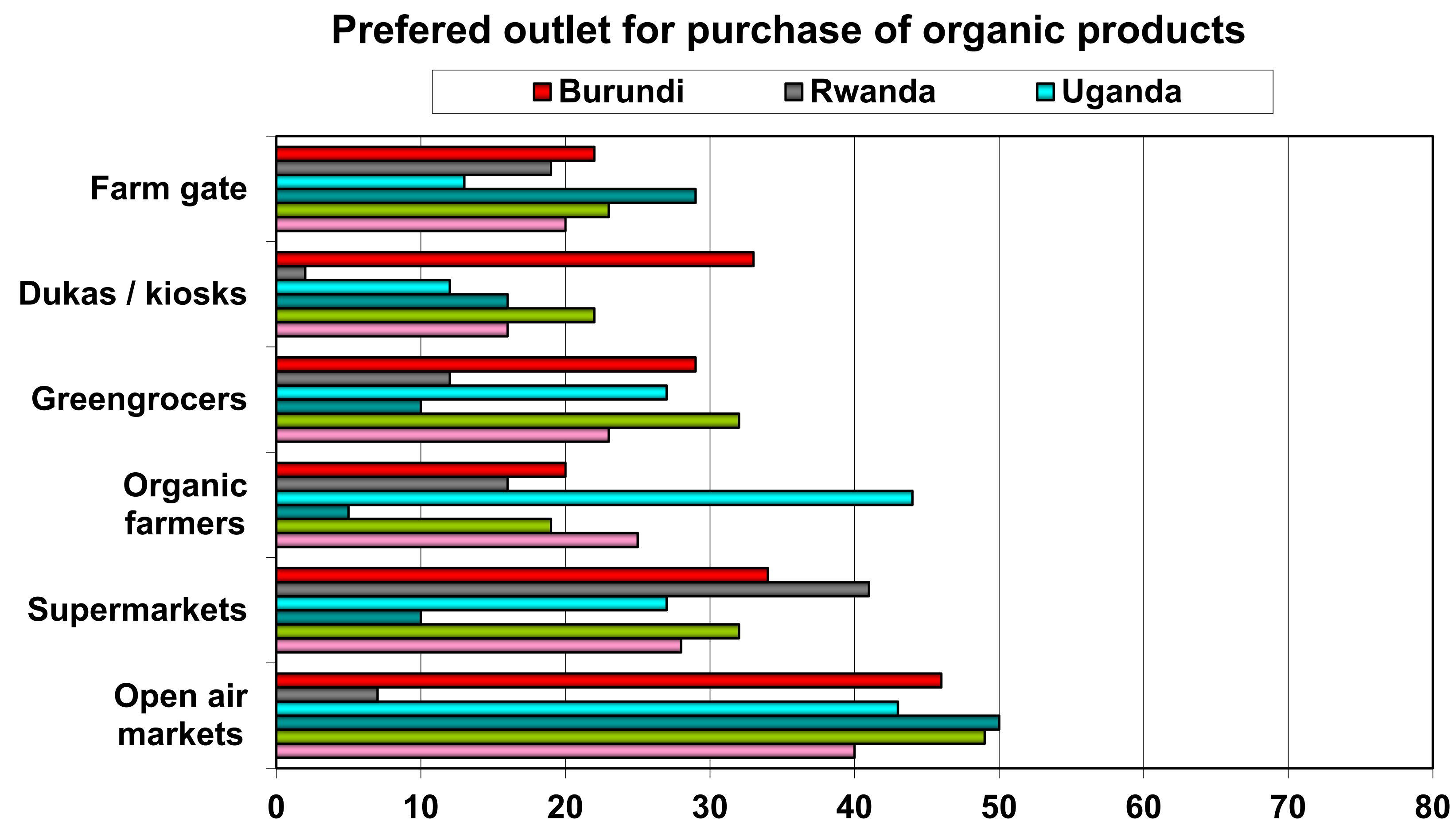
Summary of consumption per County

Country	Kenya	Uganda	Tanzania	Rwanda	Burundi	Overall
Consumption of organic products	48	72	44	74	61	59

Reasons of consumption

	FRUITS & VEGETABLES	CEREALS	DAIRY PRODUCTS	MEAT	BREAD AND PASTA
BASE	571	293	213	115	80
	100%	100%	100%	100%	100%
They are healthy / nutritious	76%	71%	72%	60%	75%
They are tasty	46%	40%	47%	38%	41%
They are safe to consume / not contaminated	32%	32%	36%	25%	43%
They are readily available	14%	18%	15%	14%	21%
Good for management of illnesses	25%	25%	29%	23%	30%
They are affordable	17%	18%	16%	17%	20%
They are environmental friendly	8%	11%	9%	7%	14%
Makes me feel in touch with my indigenous roots	5%	10%	7%	3%	8%
No specific reason / indifferent	2%	4%	1%	5%	3%

Similar to 2006 and 2013 findings, the health/nutrition, taste and safety factors in 2017 appeared to be the key motivation for consumption / purchase of organic foods



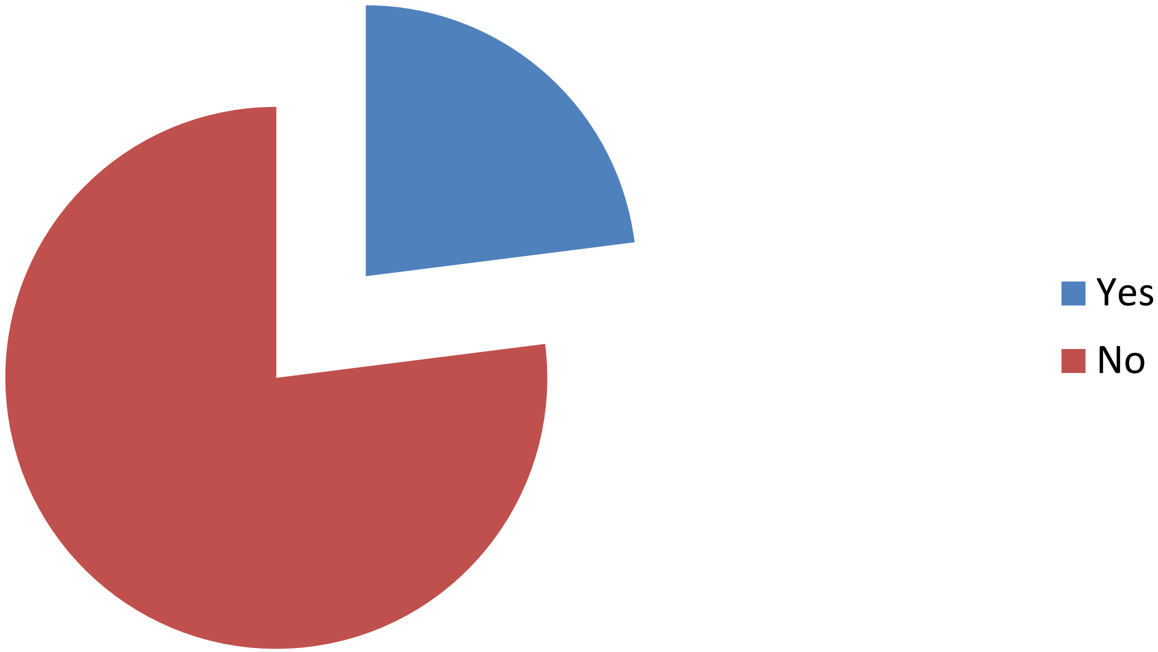
Different from 2013 and 2017 supermarkets come second to open air markets except for Rwanda as preferred outlet

Verification methods used

	2017	2013	2006
Purchase from specific shops	41	27	30
Check labels	32	23	30
Buy from specific farmers who they know practice organic farming	31	19	31
Practice own organic farming	19	14	19
Purchase specific brands they know its organic	10	14	18

Most people preferred Govt to offer verification (67%) and independent body (23%)

Have you ever seen this mark?



Yes-23%, No- 77%. 33% said they had seen it on products. 27% on TV came in second and 22% on Internet at 22%,

Recognition of the mark per country

Country	Kenya	Uganda	Tanzania	Rwanda	Burundi	Overall
Recognition of the mark	20	23	19	39	15	23

Perceptions towards organic foods

		Exclusion of chemical fertilizers	Encouragement of biological natural processes	Exclusion of synthetic pesticides	Farm animals allowed to exhibit natural behaviour	Exclusion of genetically modified organisms	Exclusion of antibiotics	Not sure
TOTAL	Like	40%	54%	25%	18%	17%	14%	13%
	Dislike	16%	4%	13%	5%	9%	9%	57%
Kenya	Like	64%	30%	41%	9%	13%	17%	9%
Uganda	Like	36%	60%	26%	30%	21%	12%	13%
Tanzania	Like	40%	53%	17%	8%	16%	13%	12%
Rwanda	Like	4%	73%	1%	18%	6%	0	10%
Burundi	Like	40%	63%	38%	24%	32%	31%	28%
Nairobi	Like	61%	32%	43%	10%	16%	12%	8%
Mombasa	Like	74%	24%	37%	7%	2%	31%	9%
Kampala	Like	36%	66%	22%	32%	18%	8%	7%
Jinja	Like	38%	49%	36%	28%	28%	20%	25%
Dar es alaam	Like	41%	54%	18%	10%	17%	11%	11%
Zanzibar	Like	36%	46%	11%	0	7%	25%	18%
Kigali	Like	4%	48%	0	35%	11%	0	19%
Musanze	Like	4%	93%	1%	4%	1%	0	3%

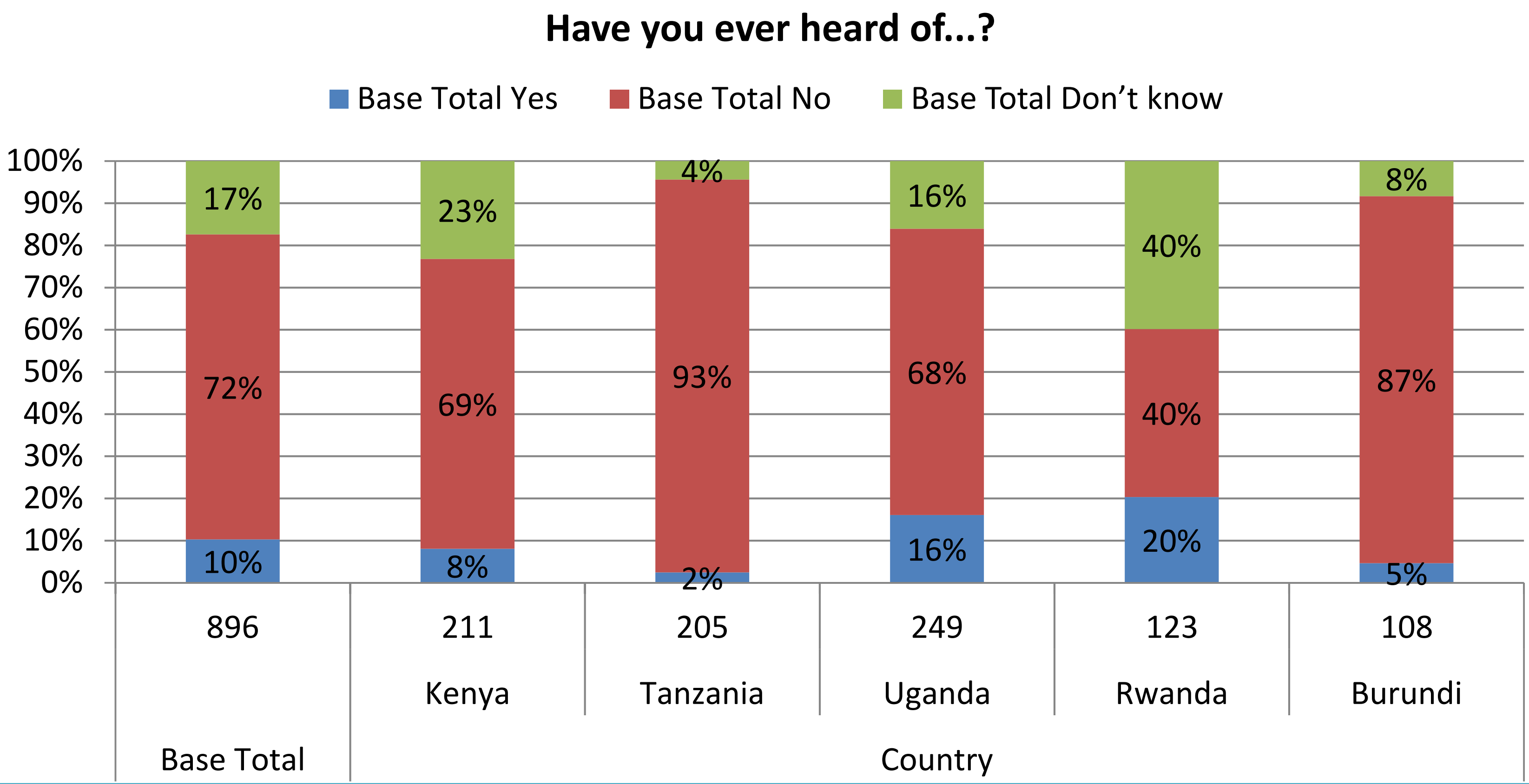
Organic is a good thing (92%)

Willingness to buy organic products

			Socio-Economic Class					
STATEMENTS	TOTAL (%)		ABCI (%)		C2D (%)		E (%)	
	Yes	No	Yes	No	Yes	No	Yes	No
I will only buy or consider buying organic products if they are cheaper than non-organic products	57%	43%	55%	45%	58%	42%	57%	43%
I will only buy or consider buying organic products if they are more or less the same price as non-organic products	61%	39%	59%	41%	64%	36%	57%	43%
I will buy or consider buying organic products even if they are slightly more expensive than non-organic products	60%	40%	58%	42%	67%	33%	50%	50%
I will buy or consider buying organic products even if they are significantly more expensive than non-organic products	47%	53%	42%	58%	52%	48%	50%	50%

This is an indication of importance of pricing in organic consumption.

Post Test of Organic Products' Awareness and Educational Materials



Kenya: 10 reasons to go organic poster, **Uganda:** Organic farmers markets, **Tanzania:** TV Morning talk at TBC, Azam TV and Clouds TV", **Rwanda**: Kigali International fair trade and village organic products markets, **Burundi:** Christmas market

Qualitative survey findings

General Business Issues in Relation to Customer Preferences

- High quality products
- Availability of products/supply consistency
- Price / affordability
- Demand / customer taste and preferences / taste /satisfaction
- Freshness
- Consistency
- Origin / source of product– is it credible / trustworthy
- Health
- Nutrition
- Shelf life
- Quantity

Issues Taken into Consideration when Stocking Food

- Quality of the products
- Price / affordability/purchasing power of consumer
- Availability – Reliable and consistent supply of the product.
- Demand
- Expiry date/storability/shelf life
- Origin / source of products
- Packaging, hygiene, freshness
- Safety, benefits to the consumer.

Attitudes towards Organic Foods

- Organic products are good for health, are safe and more nutritious
- Population that demands organic foods is the middle and upper income segment
- Organic products are very expensive and are not easily available making them to shy away from stocking them
- Most said that they sell both but more of non-organic. Reason for giving low priority to selling organic products is very limited and unreliable supply.

Verification method

- Majority buy from specific organic farmers, processors or manufacturers.
- Others indicated that they get contacts of suppliers from the National Movements
- Few said they have they own farms where they grow organic products

Challenges of selling organic

- Availability
- Price
- Lack of consistent in terms of supply quantity and quality (Quality has now emerged as an issue)
- This hinders sale in volumes
- Information of organic not available (Rwanda and Burundi)

Consumer Awareness Building and Education on Organic Products

- What is organic and what is not.
- Education on health and environmental benefits of organic products
- Use mass media; Radio, TV and newspapers and others websites, internet and social media
- Bearers of the message: producers, suppliers, traders, products, retailers, manufacturers and Governments

Verification Systems

- Provide designated places/sections in the business premises
- Specific menus for restaurants and hotels
- Sell organic products which have organic labels/marks
- Provide knowledge on availability of organic standards

Suggestions for Improvement

- Need for regular monitoring to avoid cheating
- Investment in consumer awareness and farmer education
- Work more with the Government so that it can support organic farming
- More collaboration among traders
- Improving producer-trade linkages
- Availing more information to producers, traders and consumers.

Conclusions and recommendations

- Consumer awareness has been increasing
- Significant proportions still do not know or, are not sure what is organic and what it entails (reference to natural foods).
- There is need for continued strategic and effective awareness efforts of organic products, their benefits and guarantee systems (standards, mark, verification & control)

Contd

- There are no other ‘real’ barriers to consumption
- Organic foods should be made available
- Health and safety factors should continue to be the promotional pillars
- Need for increase in awareness of verification systems

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