The Development of a Consumer awareness and Education Concept Based on A Consumer Survey of Attitudes and Preferences Towards Organic Foods and on the Review of Existing PR Materials in East Africa.

Report Prepared for:
International Federation of Organic Agriculture Movements (IFOAM)

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B) Abbreviations

IFOAM	International Federation of Organic Agriculture Movements.
KOAN	Kenya Organic Agriculture Network
TOAM	Tanzania Organic Agriculture Movement.
NOGAMU	National Organic Movement of Uganda
ABCDE	Social Economic stratification where A is high and E is low (annex 5).
NGO	Non Governmental Organization
PR	Public relation
PPS	Probability Proportionate to Size
SPs	Sampling Points
NGO	Non Governmental Organization
PGS	Participatory Guarantee System

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1. Background Information

1.1 Introduction:

Agriculture has historically been the source of livelihood to most East Africans, as well as for food security. Despite the impact of the green revolution, particularly over recent decades, and the introduction of synthetic fertilizers and agrochemicals, agriculture in Eastern Africa is still largely based on traditional method, characterized by no or little use of external inputs, but driven by the timeless wealth of indigenous knowledge (such as for natural pest and disease control, soil management and crop/livestock production) which still paramount in the majority of rural communities within the region.

However, since the introduction of synthetic fertilizers and chemicals, application for soil fertility and pest and disease control are becoming widely accepted and available practices; also affordable through government schemes and subsidized commercial sector activities. As a result of the increasing intensity of chemicals usage, ill effects on human health, the environment and the ecology of these countries has became evident. Human and animal illness from chemical-relate disorders, soils degradation, a significant decrease in the diversity of agricultural systems, pest and disease resurgence and resistance, a resulting decrease in yields, are some of the negative impacts widely acknowledged.

It has become evident to many that the green revolution is not the panacea. This widespread realization has given rise to an increasing return to husbandry lead farming practices, combining traditional knowledge and modern technology resulting in what is now formally termed as “Organic Agriculture”; promoting environmentally, socially and economically sound production of food and fibers.

Formal organic agriculture in East Africa can be traced in the early eighties, when the first organic training institutions were established and since then it has developed far and wide. However, the sector has developed slowly over these decades mainly because practitioners and promoters have been working in isolated pockets, creating a situation where activities were uncoordinated and often far less effective than their potential.

Over recent years, national organic movements have been established in each of the three countries (Tanzania, Uganda and Kenya) as co-ordinating, sector representative, and service providing bodies. However, the lack of organic markets and market access remains one of the fundamental factors holding back the development of the organic sector in the region. Trade is the oldest and most tangible auger in creating long-term economic development in rural Africa. Therefore, there is vital need to understand the complexity of the inter-related reasons why there has been little growth in the organic market activity in the region, and why organic farmers are not accessing these markets.

In addition, a majority of consumers within the region are unaware of the value of organic agriculture and products, in terms of health and environment, and therefore are not willing to patronize organic products, particularly where there is no adequate identification in the marketplace.

IFOAM is the international umbrella organization of organic agriculture movement’s world wide. One of IFOAM’s objectives is to improve income and livelihood of rural communities in East Africa through facilitation of trade in organic products by means of a regional standard and certification cooperation. As such, there is a plan to develop and implement a concept for “consumer education and awareness building” on organic products and standards of the same in East Africa. The rationale behind this education and awareness building project is based on the fact that a standard has no value if it is not known, and regional trade of organic products can only emerge if there is knowledge about the standards and the production. Therefore IFOAM's overall objective as far as this project is concerned is to increase consumers understanding of Organic Agriculture and to inform consumers in East Africa about the new standard in the Region including the importance of Standards.

As a prerequisite to achieving this, IFOAM deemed it necessary to carry out a survey on the attitudes and preferences of consumers in East Africa (Kenya, Uganda and Tanzania) and scan existing PR materials to provide crucial information that will guide the education and awareness building concept within the auspices of Harmonization of Guarantee Systems in East Africa Project. KOAN which is a national membership organization which coordinates organic agricultural activities in Kenya was commissioned to carry out this survey on behalf of IFOAM with the help of TOAM and NOGAMU which are also organic agricultural movements in Tanzania and Uganda respectively.

1.2 Aim of the survey:

Consumer education / consumer awareness building in East Africa
Identify consumers' attitudes towards Organic Agriculture, collect PR materials and produce recommendations for consumer awareness activities in East Africa

1.3 Overall Objective of the OSEA Project:

To develop organic standard in East Africa to improve income and livelihood of rural communities in East Africa through facilitation of trade in organic products by means of a regional standard and certification cooperation.

1.4 Overall Objective of the assignment:

To increase consumers understanding of Organic Agriculture and to inform consumers in East Africa about the new Organic Guarantee Systems in the Region including the importance of Standards

1.5 Key Research objectives were:

- Identify consumers' attitudes towards organic products and different verification systems in East Africa (Uganda, Tanzania, Kenya)
- Screen existing consumer awareness materials in East Africa
- Produce recommendations for consumer awareness activities to be carried out in 2007.

2. Rationale

2.1 Demand-side issues:

'A standard has no value if it is not known' …and trusted. In order for the organic marketplace to develop and expand, consumers need to be sensitised to the additional value that organic food and non food product provide them, and exposed to clear, consistent and reliable product identification in the form of attractive, endorsed labeling.

2.2 Supply-side issues:

Regional trade of organic products can only emerge if producers/ suppliers/ traders take part, in sufficient numbers, in a reliable and professionally managed labeling scheme[1] which

[1] Which ensures third part verification and a sound traceability system

provides clear, consistent identification in the marketplace to the consumers in an attracted and confidence inspiring manner.

2.3 Existing information resources and institutional capacity:

Three strong and active national organic movements exist in the Eastern African region (Uganda, Kenya and Tanzania) and some level of information from market and consumer studies and PR materials are already available. For the success of the survey, the 3 East African National Organic bodies were very vital in carrying out the field work. This was done to maintain the spirit of East Africa cooperation.

3. Research Methodology and Process

3.1 Technique

Both qualitative and quantitative methodologies were employed in this survey.

A quantitative random survey was carried out amongst consumers in Kenya, Uganda and Tanzania. In each country a total of 200 interviews were to be carried out thus bringing the overall total sample target to 600. The 200 interviews in each country were distributed between 2 towns, the capital city, and one other select town. The select towns were chosen on the basis of their being major tourist areas. The interviews were distributed randomly according to PPS (Probability Proportionate to Size) down to the SPs (Sampling Points) within each town.

A qualitative survey was carried out amongst Key Informants in each of the 6 towns. They Key Informants were classified into managers or proprietors of hotels, restaurants, supermarkets and greengrocers. An overall total of 60 Key Informant Interviews were carried out, 10 in each town.

3.2 Survey instruments

Two main instruments were prepared towards achieving the survey objectives:

- A structured questionnaire with both closed and open ended questions which was administered to consumers for the quantitative random survey
- A short Questionnaire with open ended questions regarding the different organic movements and other stakeholders experience in preparing and applying PR materials
- A discussion guide which was administered to key informants
- The above instruments were prepared on the basis of the research objectives. Past surveys in the region were also perused so as to ensure that these survey instruments indeed covered the key issues and that the data that would be obtained from these instruments would help fill the current information gaps.
- One other instrument prepared was a recruitment questionnaire to help establish suitable respondents who would fit the profile of Key Informants thus qualify to be interviewed for the survey.

3.3 Fieldwork and other logistics

Before commencement of fieldwork, detailed training and briefing of field teams was carried out in two phases. One was conducted in Nairobi, Kenya by a technical research expert to representatives of KOAN, NOGAMU and TOAM. These representatives in turn trained their field teams in their respective countries. A detailed field manual was used in the training and a copy provided to all enumerators for reference during fieldwork.

Fieldwork was carried out over a 4-week period (staggered from country to country) in October and early November 2006. A total of 30 enumerators were used for the whole survey with representatives of KOAN, NOGAMU and TOAM acting as field supervisors throughout the fieldwork duration as well as carrying out some of the Key Informant Interviews.

3.4 Data processing and analysis

The data was processed and analyzed over a 2 week period (October to November 2006). The quantitative survey was analyzed using SPSS to produce a clean data file while the qualitative survey was analyzed through grid preparation so as to enable comparison of responses across different interviews.

4.0 Survey Results

4.1 Demographic Details of Survey Respondents and Composition of Key Informant Interviews

Table1: Demographic details of survey respondents

Table 1 below shows the total sample breakdown by country in terms of town, gender, socio-economic class, age, and education level. Largely these are the sample breaks that have been used to analyze the findings in chapter 3.0 of this report particularly where the respondent bases by these breaks are robust enough.

		BASE		Kenya		Tanzania		Uganda	
	TOTAL	602	100%	202	34%	203	34%	197	33%
TOWN	Nairobi	154	100%	154	100%	0	0%	0	0%
	Mombasa	48	100%	48	100%	0	0%	0	0%
	Dar es Salaam	177	100%	0	0%	177	100%	0	0%
	Zanzibar	26	100%	0	0%	26	100%	0	0%
	Kampala	163	100%	0	0%	0	0%	163	100%
	Jinja	34	100%	0	0%	0	0%	34	100%
GEN DER	Male	310	100%	84	27%	118	38%	108	35%
	Female	292	100%	118	40%	85	29%	89	30%
SOCIAL ECONOMIC CLASS	AB	106	100%	51	48%	16	15%	39	37%
	C1	178	100%	59	33%	37	21%	82	46%
	C2	187	100%	57	30%	92	49%	38	20%
	D	98	100%	27	28%	38	39%	33	34%
	E	33	100%	8	24%	20	61%	5	15%
AGE BRACKET	18 - 24	115	100%	56	49%	18	16%	41	36%
	25 - 34	202	100%	70	35%	53	26%	79	39%
	35 - 44	142	100%	46	32%	50	35%	46	32%
	45 - 55	91	100%	26	29%	45	49%	20	22%
	56+	23	100%	4	17%	9	39%	10	43%
	Don't know	29	100%	0	0%	28	97%	1	3%
EDUCATION LEVEL	No formal schooling	30	100%	1	3%	27	90%	2	7%
	Informal schooling only (including Koranic schooling)	16	100%	3	19%	10	63%	3	19%
	Some primary schooling	40	100%	4	10%	24	60%	12	30%
	Primary school completed	46	100%	12	26%	14	30%	20	43%
	Some secondary school/high school	81	100%	19	23%	19	23%	43	53%
	Secondary school/high school completed	150	100%	44	29%	58	39%	48	32%
	Post-secondary qualifications, other than university e.g. a	125	100%	72	58%	20	16%	33	26%
	Some university	23	100%	10	43%	7	30%	6	26%
	University completed	59	100%	25	42%	4	7%	30	51%
	Post-graduate	12	100%	12	100%	0	0%	0	0%
	DIDN'T MENTION	20	100%	0	0%	20	100%	0	0%

Table2 : Composition of Key Informant interviews

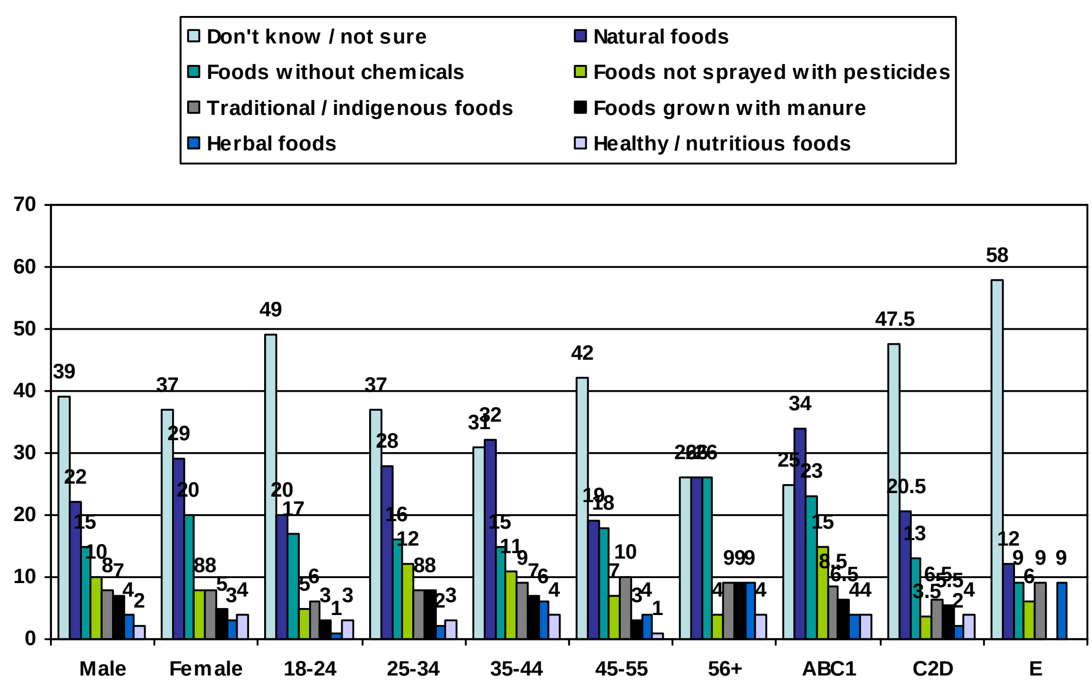
	Hotels	Restaurants	Green-grocers	Supermarkets
KENYA				
Nairobi	3	3	2	2
Mombasa	3	2	1	2
TANZANIA				
Dar-es Salaam	4	3	2	1
Zanzibar	2	2	2	2
UGANDA				
Kampala	3	3	2	4
Jinja	-	3	3	3

4.2 Quantitative Survey Findings

4.21 Awareness and usage of organic food products

In order to gauge the levels of awareness of consumers on organic food products they were first asked what they understood by the term ‘organic foods’. There appeared to be a significantly high lack of awareness as out of the total sample, 38% said they did not know or were not sure what the term ‘organic foods’ means. Majority of these who were not sure or did not know were from the Tanzania sample (57%), followed by Kenya (44%) and only 13% from Uganda. Another 26% of the total sample said that organic foods were natural foods, 17% said that they were foods without chemicals, 9% foods not sprayed with pesticides, 8% traditional or indigenous foods, 6% foods grown with manure, while herbal foods, and healthy/nutritious foods were each mentioned by 3% of the total sample. **Fig 1** below shows the responses by age, gender and socio-economic class.

Understanding of 'Organic Foods'



In terms of education level, the responses can be seen in the table below. It is apparent that more respondents with lower education level said they were not sure or did not know what 'organic foods' are as compared to those with higher education level.

	No formal schooling	Informal schooling only	Some primary schooling	Primary school completed	Some secondary school/high school	Secondary school/high school completed	Post-secondary qualifications, other than university e.g. a	Some university	University completed	Post-graduate
BASE	30	16	40	46	81	150	125	23	59	12
Don't know / not sure	40%	44%	40%	46%	44%	46%	38%	26%	10%	17%
Natural foods	23%	13%	23%	15%	21%	22%	33%	26%	37%	58%
Foods without chemicals	27%	25%	8%	13%	11%	12%	16%	17%	32%	58%
Foods not sprayed with pesticides	7%	13%	5%	2%	2%	5%	14%	9%	22%	17%
Traditional / indigenous foods	3%	13%	20%	11%	7%	7%	8%	0%	7%	0%
Foods grown with manure	10%	0%	3%	0%	11%	2%	6%	9%	12%	8%
Herbal foods	7%	0%	0%	7%	5%	3%	2%	13%	0%	0%
Healthy / nutritious foods	7%	0%	5%	9%	1%	2%	2%	0%	3%	8%

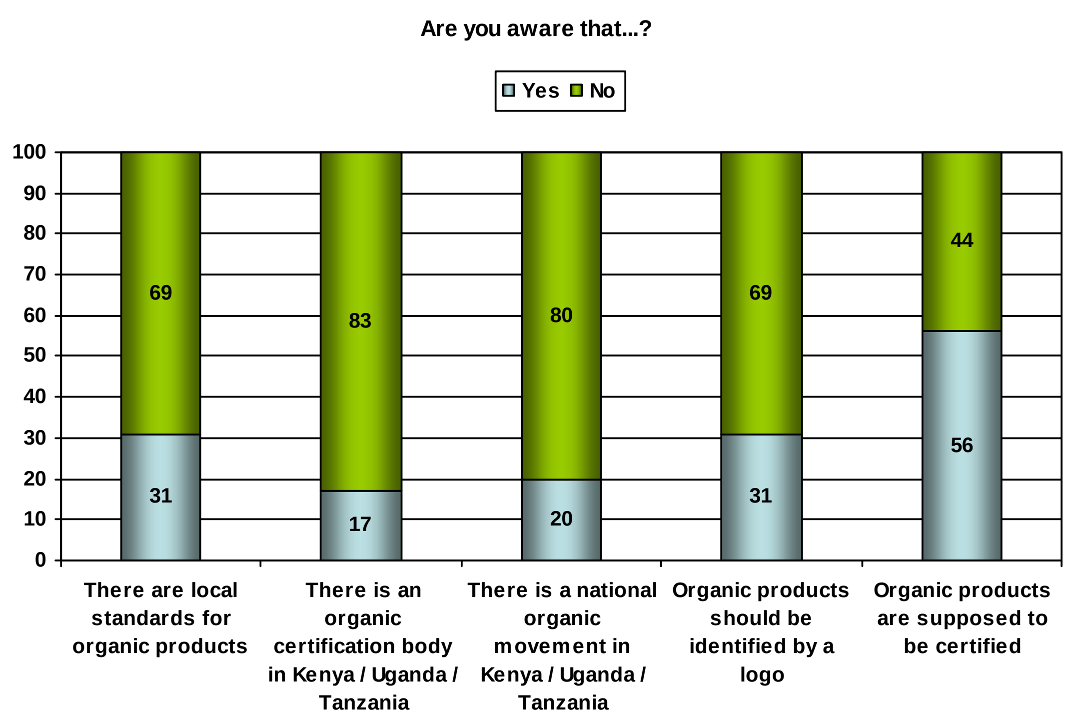
The consumers were also asked their source of information on what organic food products are. Word of mouth and teachings at school or college appear to be the most common source of information across the different ideologies of what organic foods are. This is followed by television programmes or adverts and radio programmes or adverts. Details can be seen in the table below:

Table 3: Source of information on what organic foods are

	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 =)	154	104	54	47	36	20	19
Percent	100%	100%	100%	100%	100%	100%	100%
Word of mouth	50	29	12	14	-	6	4
	32%	28%	22%	30%	-	30%	21%
Taught in school / college	38	26	23	6	14	4	4
	25%	25%	43%	13%	39%	20%	21%
Television programmes /adverts	18	11	6	1	3	3	4
	12%	11%	11%	2%	8%	15%	21%
Radio programmes / adverts	14	11	7	2	3	-	-
	9%	11%	13%	4%	8%	-	-
Books	12	11	5	4	3	-	-
	8%	11%	9%	9%	8%	-	-
Don't know / not sure	10	6	1	3	1	2	4

	6%	6%	2%	6%	3%	10%	21%
Newspaper	8	12	4	4	-	2	-
	5%	12%	7%	9%	-	10%	-
Magazines	8	13	8	-	-	3	2
	5%	13%	15%	-	-	15%	11%
At a promotional / educational event	8	6	1	3	3	3	1
	5%	6%	2%	6%	8%	15%	5%
KARI/Teachings from experts	1	2	1	-	-	-	-
	1%	2%	2%	-	-	-	-
A shop in the estates	1	1	-	1	-	-	-
	1%	1%	-	2%	-	-	-
Internet	1	-	-	-	1	-	-
	1%	-	-	-	3%	-	-
Traditional knowledge	1	1	-	1	-	-	-
	1%	1%	-	2%	-	-	-
Supermarkets	1	-	-	-	-	-	-
	1%	-	-	-	-	-	-
Own opinion	-	-	-	9	-	1	1
	-	-	-	19%	-	5%	5%
Practices organic farming	-	-	-	1	-	2	1
	-	-	-	2%	-	6%	5%

Consumers' awareness on certain facts about organic products was also tested. A set of statements was read out to the respondents and they were asked to state whether or not they were aware of this fact. **Fig 2** below shows the findings.



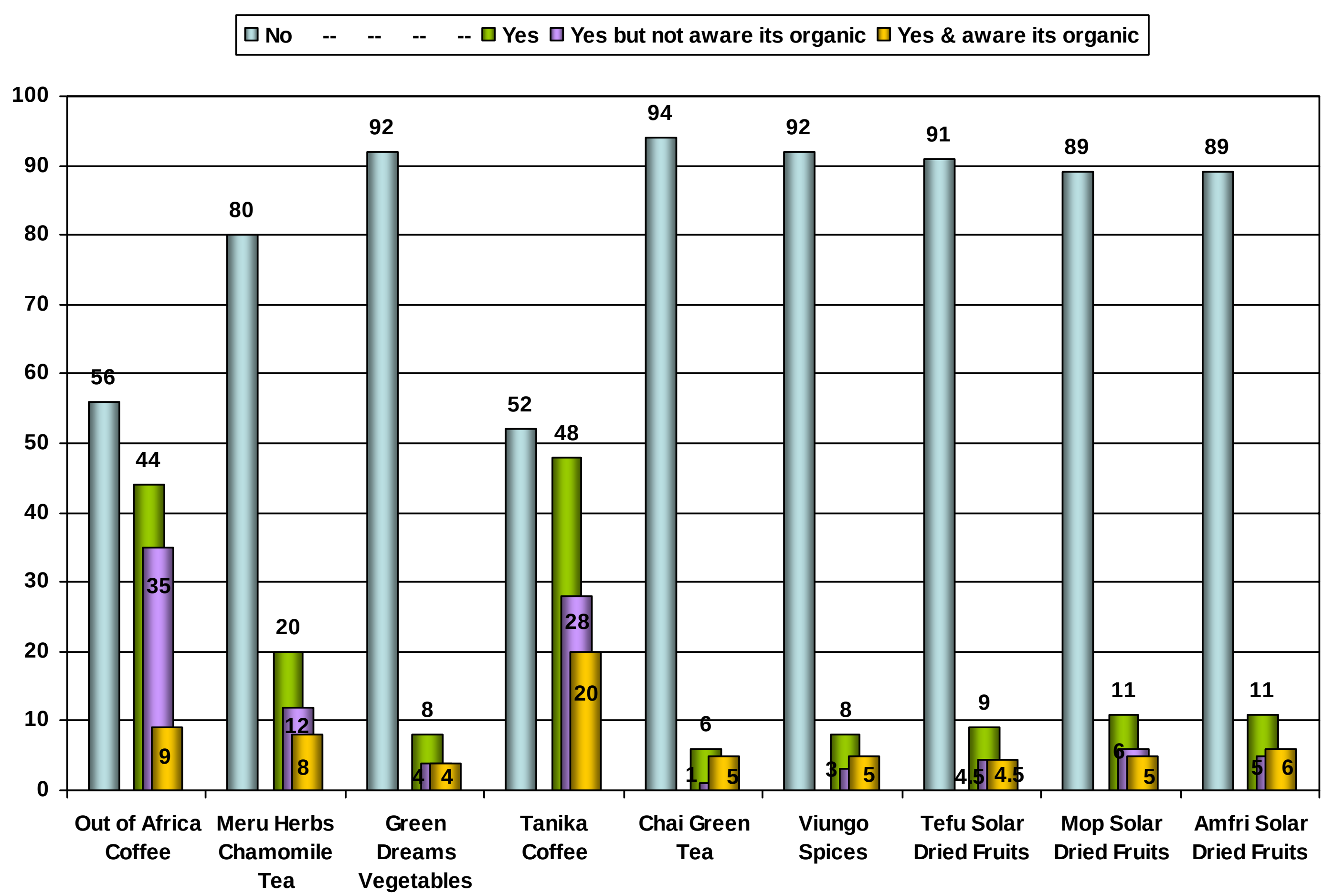
There appears to be low awareness of organic products in as far as all but one of these basic facts is concerned. Responses by country are provided in the table below where it becomes evident that there was somewhat higher awareness in Tanzania on most of the statements as compared to Kenya and Uganda. It is important to note however that some of this may be 'claimed' awareness given that the statements were read out to the respondents and they were asked to state whether they were aware of these facts or not.

Table 4: Awareness of facts on organic products / farming

		TOTAL	Kenya	Uganda	Tanzania
There are local standards for organic products	YES	31	18	24	49
	NO	69	82	76	51
There is an organic certification body in Kenya / Uganda / Tanzania	YES	17	13	15	23
	NO	83	87	85	77
There is a national organic movement in Kenya / Uganda / Tanzania	YES	20	17	28	16
	NO	80	83	72	84
Organic products should be identified by a logo	YES	31	19	14	59
	NO	69	81	86	41

Further, to gauge awareness on organic products, respondents in the three countries were asked to state whether or not they were aware of certain organic brands in their respective markets and for those who were, whether they were also aware that these brands were organic. **Fig 3** shows the results.

Are you aware of... and if so that it is organic?



Out of Africa Coffee (Kenya) and Tanika Coffee (Tanzania) were the two products that turned out to be significantly known. However few of those who had heard of Out of Africa coffee knew it is organic while almost half of those who claimed to know Tanika coffee also said they knew that it is organic.

In terms of education level, the findings can be seen in the table below

Table 5: A relation between Schooling and Knowledge of Organic products

		No formal schooling	Informal schooling only (including Koranic schooling)	Some primary schooling	Primary school completed	Some secondary school/high school	Secondary school/high school completed	Post-secondary qualifications, other than university e.g. a	Some university	University completed	Post-graduate
Out of Africa Coffee	YES	0%	0%	50%	25%	26%	39%	43%	70%	60%	66%
	NO	100%	100%	50%	75%	74%	61%	57%	30%	40%	34%
Meru Herbs Chamomile Tea	YES	0%	33%	25%	8%	21%	16%	24%	30%	20%	20%
	NO	100%	67%	75%	92%	79%	84%	76%	70%	80%	80%
Green Dreams Vegetables	YES	0%	0%	0%	17%	16%	7%	6%	0%	8%	20%
	NO	100%	100%	100%	83%	84%	93%	94%	100%	92%	80%
Tanika Coffee	YES	50%	33%	40%	17%	7%	32%	76%	55%	57%	-
	NO	50%	67%	60%	83%	93%	68%	24%	45%	43%	-
Chai Green Tea	YES	7%	40%	0%	0%	11%	0%	5%	14%	0%	-
	NO	93%	60%	100%	100%	89%	100%	95%	86%	100%	-
Viungo spices	YES	11%	50%	0%	0%	11%	2%	5%	14%	0%	-
	NO	89%	50%	100%	100%	89%	98%	95%	86%	100%	-
Tefu Solar Dried Fruits	YES	0%	0%	0%	5%	5%	4%	18%	0%	20%	-
	NO	100%	100%	100%	95%	95%	96%	82%	100%	80%	-
Mop Solar Dried Fruits	YES	0%	33%	8%	5%	9%	4%	18%	17%	20%	-
	NO	100%	67%	92%	95%	91%	96%	82%	83%	80%	-
Amfri Solar Dried Fruits	YES	0%	0%	0%	5%	9%	2%	24%	0%	20%	-
	NO	100%	100%	100%	95%	91%	98%	76%	100%	80%	-

On usage, consumers were asked whether they have ever consumed or considered consuming organic products. Surprisingly, majority of the total sample claimed they had ever consumed organic products (49%), a significant number (34%) however were not sure or did not know, 11% said no while 6% said they had considered consuming. There were no major disparities in response by country. However, expectedly, the higher socio-economic classes were the majority in terms of those who had ever consumed ABCI being at 57%, as compared to C2D and E at 41.5% and 24% respectively.

Those who said they had ever consumed or considered consuming organic products were further asked to specify which types of organic foods these were in particular. Expectedly an overwhelming majority mentioned organic fruits and vegetables (85%), followed by organic cereals which received 35% mention, then organic dairy products and organic meat at 16% and 14% respectively and finally organic bread and pasta at 8%. Organic fruits and vegetables were popular across the three countries. Cereals however appeared to have a significantly higher mention in Tanzania (65%), as compared to Kenya (39%), and Uganda at a mere 8%. There was also no mention of organic dairy products nor organic bread and pasta at all in Uganda as well as a much lower mention of organic meat (5%) as compared to Kenya 19%) and Tanzania (18%).

Reasons for consumption of the different types of organic food products were also explored and these are tabulated below.

Table 6: Reasons for consumption of organic food type

	FRUITS & VEGETABLES	CEREALS	DAIRY PRODUCTS	MEAT	BREAD AND PASTA
BASE	280	115	54	45	26
	100%	100%	100%	100%	100%
They are healthy / nutritious	141	55	32	22	18
	50%	48%	59%	49%	69%
They are safe to consume / not contaminated	69	33	18	15	15
	25%	29%	33%	33%	58%
They are tasty	59	23	22	24	14
	21%	20%	41%	53%	54%
They are readily available	36	27	18	14	10
	13%	23%	33%	31%	38%
Good for management of illnesses	36	12	12	9	9
	13%	10%	22%	20%	35%
They are affordable	27	18	14	10	12
	10%	16%	26%	22%	46%
They are environmental friendly	23	14	10	10	11
	8%	12%	19%	22%	42%
Makes me feel in touch with my indigenous roots	19	15	11	9	10
	7%	13%	20%	20%	38%
No specific reason / indifferent	15	7	6	3	-
	5%	6%	11%	7%	-

The health and safety factors appeared to be the key motivating factors of consumption / purchase followed by taste. Similarly, the health factor and taste factor also appeared to be ranked highly as key considerations when purchasing food products in general when respondents were asked to rank seven key purchasing considerations from most important to least important. By working out a mean score, the ranking was as follows:

Most Important

Price / affordability
Health / nutrition value
Packaging quality
Taste
Availability
Packaging size
Brand name

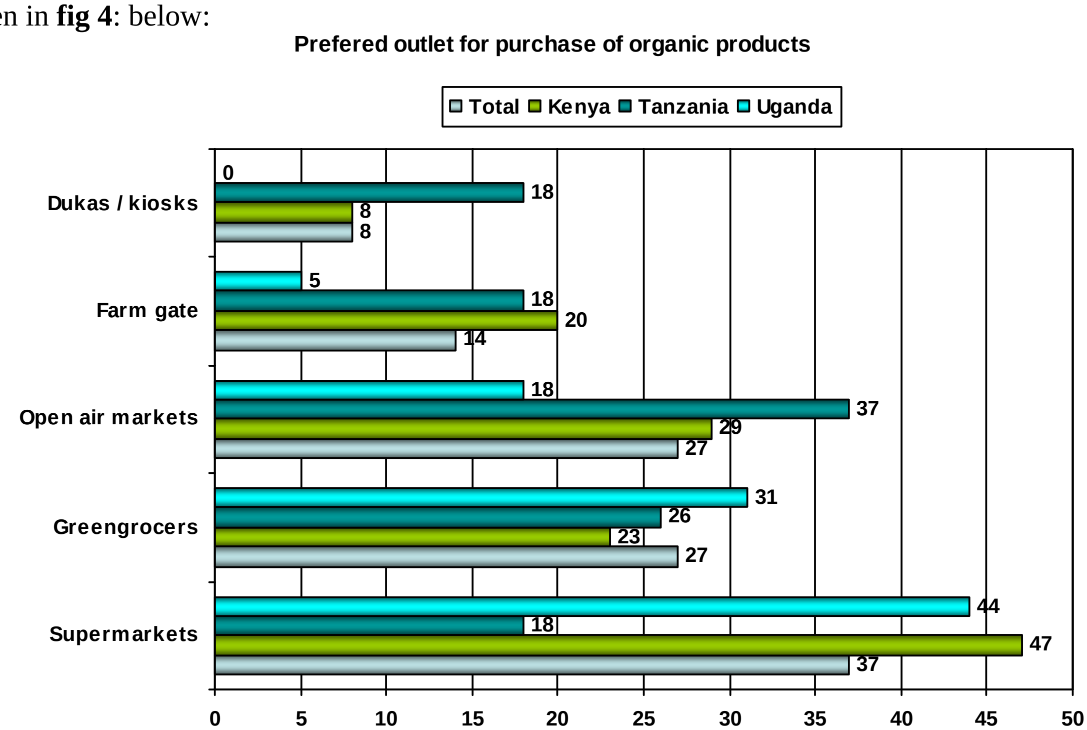
This analysis implies that organic food products should be quite popular with consumers given that some of the reasons most people consume them are also some of the key considerations when purchasing food products in general. Noteworthy however is that price / affordability is the most important consideration when shopping hence organic food products need to be perceived as affordable in order to increase consumption by consumers.

Those who said that they had never consumed organic food products nor considered doing so were also asked to give their reasons for this. The overwhelming majority, 79%, had no specific reasons or, were indifferent. Other reasons cited albeit insignificantly were as follows:

They are not readily available or don't know where to get them	8%
They are expensive	5%
They are not tasty	3%
They are not healthy	3%
They are unsafe	3%

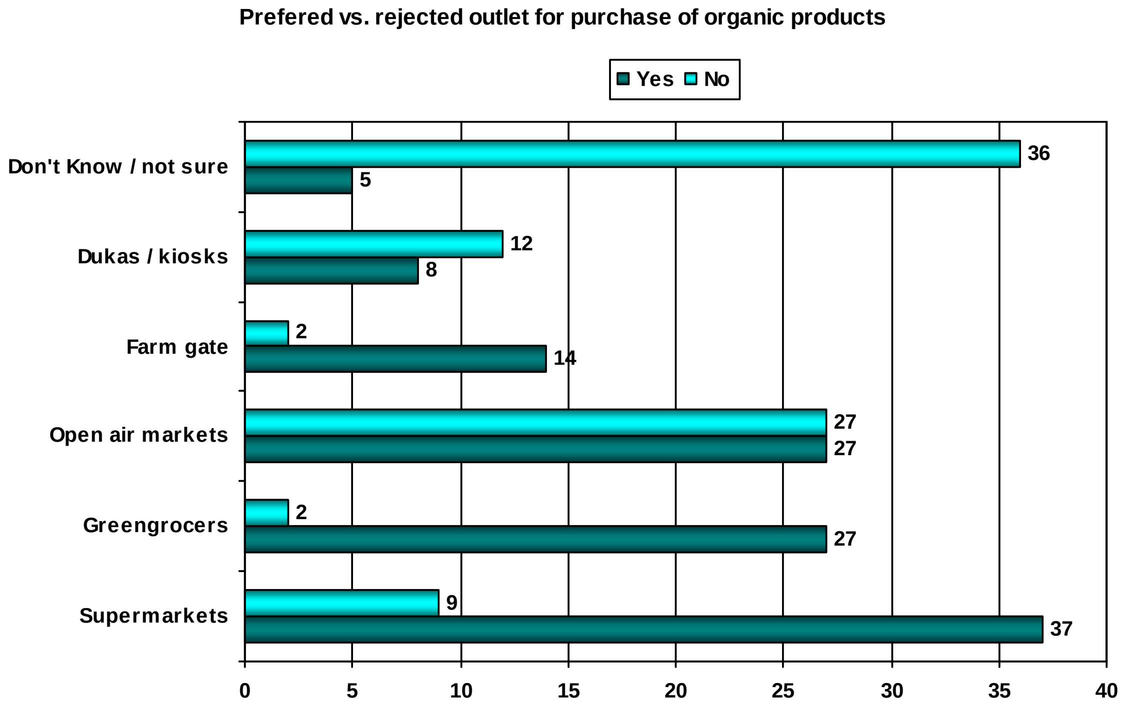
This implies that there may be no real barriers or resistance to consumption of organic products. What could be lacking is more education and awareness of organic products and farming to drive home the benefits so as to make consumers keener to consume organic.

Those who had said they had ever consumed or considered consuming organic products were also asked where they would prefer to purchase organic products from. The results are as seen in **fig 4**: below:



Supermarkets were overall the most preferred particularly in Kenya and Uganda and in all three countries this was particularly true for the capital cities. This was followed by greengrocers who, were actually more preferred than supermarkets in Tanzania but not as preferred as open air markets. Farm gate was more popular in Kenya and Tanzania as compared to Uganda while dukas / kiosks were more popular in Tanzania as compared to Kenya and Uganda.

Similarly respondents were asked which places they would not purchase organic food products from. **Fig 5**: below provides a comparative analysis of the various outlet types in terms of acceptance / preference versus rejection or disapproval. Note however that the majority were not sure or did not know which outlets they would not purchase organic foods from and this could imply that there are also no real barriers to outlet types hence there is great potential for distribution of organic products.



Respondents who said that they have ever consumed or considered consuming organic foods products were also asked how they would verify that the foods they are buying or consuming are organic. 31% said they buy or would buy from specific farmers who they know practice organic farming, 30% also said they would check the labels, 30% that they purchase or would purchase from specific shops that they know sell organic products, 24% said they practice their own organic farming, 19% were not sure or did not know while 18% said they would only purchase specific brands that they know to be organic. Further the respondents who mentioned any given verification method as discussed above were asked whether they trust this method or not. The findings are tabulated below:

Table 7: Trust of verification methods

	TRUST		
VERIFICATION METHOD	No	Yes	Not sure
Buying from specific farmers who practice organic farming	14%	77%	9%
Checking labels	18%	75%	7%
Purchasing from specific shops that are known to sell organic products	22%	69%	9%
Practicing own organic farming	15%	73%	11%
Purchasing specific brands known to be organic	11%	77%	12%

All respondents were asked whether or not they felt that there was need for a verification system. Majority 69%, said yes and 31% said no. In Kenya 52% said yes and 48% no, in Tanzania 70% said yes and 30% no while in Uganda 85% said yes and 15% said no. Overall, need for a verification system also appeared to be more important to the higher socio-economic groups than the lower ones. Those who felt there was need for a verification system were also asked to state who should be in-charge of providing this verification. Majority mentioned the government (51%) and this received the highest mention across the three countries, 46%, 78%, and 32% for Kenya, Tanzania and Uganda respectively. Out of the total sample who felt a need for verification, 19% also said it should be provided by an independent certification body and 18% said it should be done by NGOs working with farmers. Other responses given were companies buying from farmers, 10%, groups of producers 7% and the producer himself 6%.

4.22 Perceptions and Attitudes Towards Organic Farming And Food Products

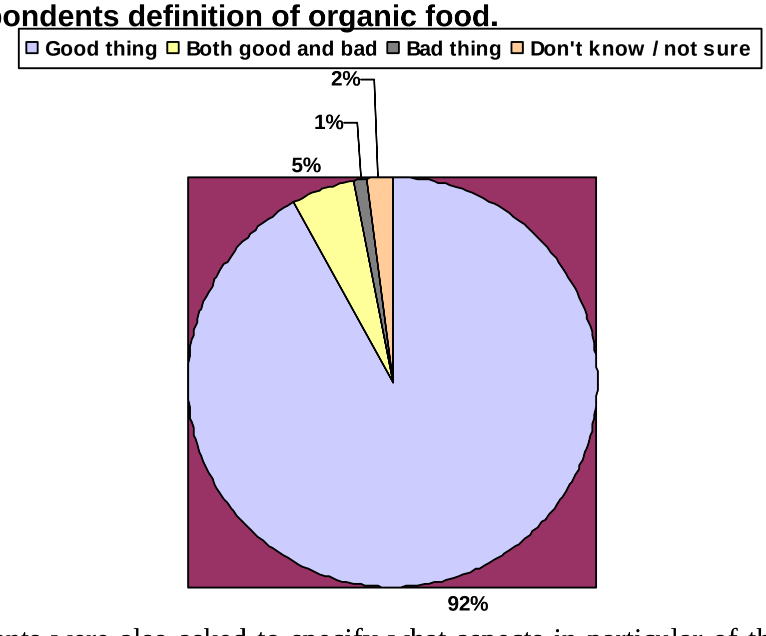
In order to gauge perceptions and attitudes, respondents were given a statement defining or describing organic farming / products to read or it was read out to them and were then asked to react to it. The statement was as follows:

> ***"Organic produce or products are those produced and processed through a system that encourages biological natural processes on the farm, allows farm animals to exhibit natural behavior and excludes the use of synthetic pesticides, chemical fertilizers, antibiotics and genetically modified organisms."***

Based on this statement an overwhelming majority said that they thought organic products were a good thing as can be seen in the pie chart below.
The positive response cut across the three countries, towns, age-groups and socio-economic classes as well as education level of different respondents.

Based on the working definition of organic products, do you think that organic products are...?

Fig 6: Respondents definition of organic food.



The respondents were also asked to specify what aspects in particular of the statement they liked and which they disliked. A country by country, and town by town analysis of likes is given below since majority had no dislikes or were not sure (79%):

Table 8: Analysis Of Likes And Dislikes In The Organic Agriculture Concept

		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	47%	36%	35%	15%	12%	11%	10%
	Dislike	4%	1%	4%	2%	6%	4%	79%
Kenya	Like	72%	50%	53%	27%	22%	19%	6%
Uganda	Like	16%	47%	17%	13%	4%	1%	5%
Tanzania	Like	53%	12%	35%	6%	9%	13%	19%
Nairobi	Like	66%	44%	50%	17%	11%	9%	6%
Mombasa	Like	90%	69%	60%	56%	54%	50%	4%
Kampala	Like	17%	45%	19%	11%	3%	1%	4%
Jinja	Like	12%	58%	6%	18%	6%	0%	9%
Dar es Sal	Like	52%	9%	36%	3%	8%	11%	21%
Zanzibar	Like	58%	31%	31%	23%	15%	31%	0%

Generally it appears that the most liked aspects across the countries and the towns are exclusion of chemical fertilizers, encouragement of biological natural processes, and exclusion of synthetic pesticides. This could be an indication of key aspects of organic farming or products that should be over-emphasized during the educational and promotional campaign. In Mombasa however the respondents seemed to be enthusiastic about all the aspects of the statement.

Having been exposed to the statement defining organic products, the respondents were asked to give a score on a scale of 1 to 10 (where 1 is not important at all, and 10 is very important) as to how important it would now be to them to consume organic products. Overall, majority gave high scores hence a mean score of 8.1. At data analysis stage, the responses for this question were cross-tabulated with the responses from the usage question so as to see the importance of consumption by those who had ever consumed, ever considered consuming and those who had not or never considered consuming organic products. Interestingly, it turned out that even for those who had never consumed or never considered consuming organic products, it was now quite important to them to consume organic products after learning what organic products are. The mean scores were as follows:

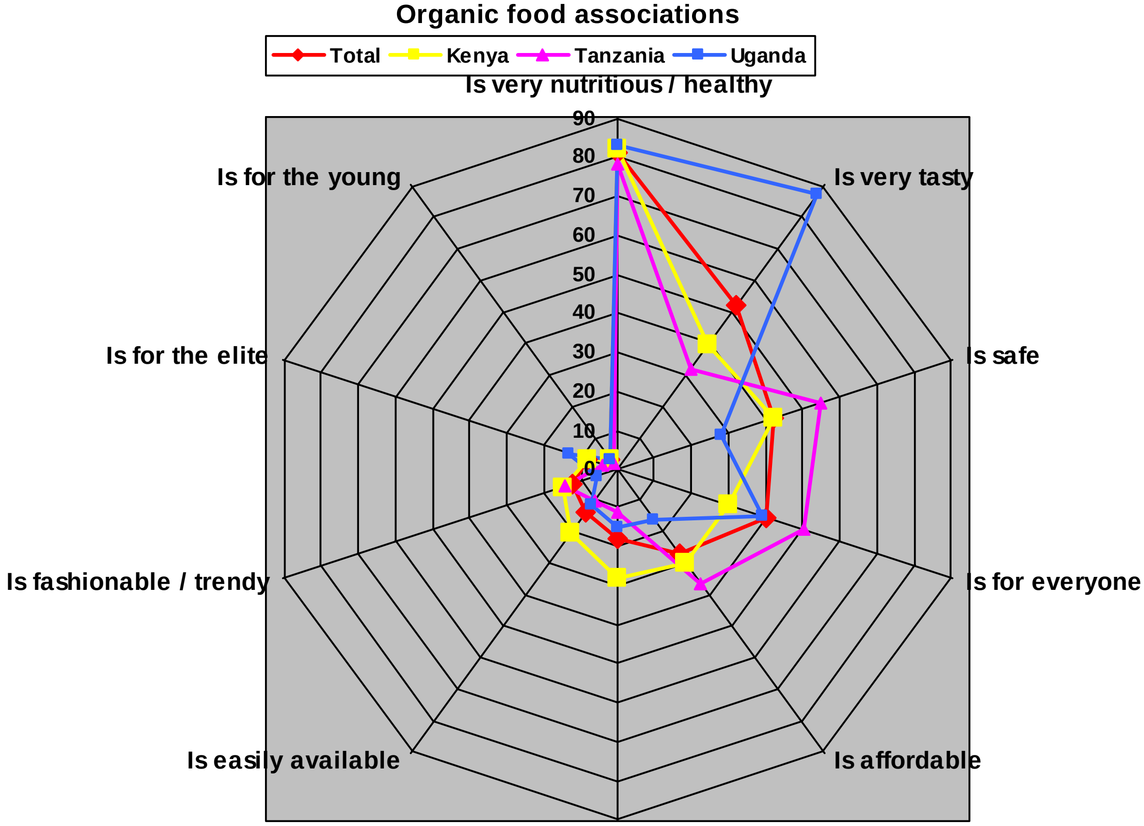
How important is it for you to now consume organic food products?

	Importance score out of 10
Those who had ever consumed	8.3
Those who had ever considered consuming	8.7
Those who had never consumed or considered	7.4

Again this implies that it is more out of a lack of awareness on organic products that lends to low or non-consumption of organic products.

In order to gauge what consumers would most associate with organic foods, respondents were exposed to several short statements and asked to state which one they felt was most suited to organic foods. The key associations were ‘is very nutritious / healthy’, ‘is very tasty’, ‘is safe’ and ‘is for everyone’ as can be seen in the chart below:

Fig 7 Key associations of the Organic Food Concept Among the Respondents



Respondents were also asked to give their suggestions on what should be done to improve or support organic farming and the market for organic products. 26% said that organic farming technology should be taught to farmers, 22% said creation of more awareness on organic foods, and 11% said the government should encourage high level of organic production, while 5% mentioned media advertisements. 36% had no suggestions.

4.23 Post Test of Organic Products' Awareness and Educational Materials

In response to whether they had heard or seen any advertising or information relating to organic farming or food products in the last one year, majority said they had not (54%), 31% said they had while 15% were not sure. Tanzania had a significantly large proportion of respondents who were not sure (39%) as compared to 2% and 3% in Kenya and Uganda respectively. Thus only 16% in Tanzania said they had seen or heard some information or advertising as compared to 35% in Kenya and 42% in Uganda.

The following sources were given by the respondents who said they had heard or seen some information or advertising on organic farming or products in the last one year.

Table 9: Sources of Organic Agriculture Information

		COUNTRY			TOWN						GENDER	
	TOTAL	Kenya	Tanzania	Uganda	Nairobi	Mombasa	Dar es Salaam	Zanzibar	Kampala	Jinja	Male	Female
BASE	184	70	32	82	60	10	27	5	73	9	90	94
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Radio program or news	62	14	4	44	11	3	3	1	39	5	36	26
	34%	20%	13%	54%	18%	30%	11%	20%	53%	56%	40%	28%
TV program or news	60	16	9	35	12	4	7	2	35	0	35	25
	33%	23%	28%	43%	20%	40%	26%	40%	48%	0%	39%	27%
In a book	43	9	4	30	7	2	4	0	30	0	26	17
	23%	13%	13%	37%	12%	20%	15%	0%	41%	0%	29%	18%
newspaper in the general news section/stories	42	17	2	23	13	4	1	1	22	1	24	18
	23%	24%	6%	28%	22%	40%	4%	20%	30%	11%	27%	19%
Health worker – doctor, nurse or nutritionist	37	10	3	24	8	2	2	1	23	1	14	23
	20%	14%	9%	29%	13%	20%	7%	20%	32%	11%	16%	24%
Friends advice or discussion	33	16	1	16	12	4	0	1	16	0	18	15
	18%	23%	3%	20%	20%	40%	0%	20%	22%	0%	20%	16%
Packaging / products in shop	28	19	4	5	17	2	4	0	5	0	14	14
	15%	27%	13%	6%	28%	20%	15%	0%	7%	0%	16%	15%
Social function / community meet	27	7	2	18	4	3	1	1	18	0	10	17
	15%	10%	6%	22%	7%	30%	4%	20%	25%	0%	11%	18%
TV advert or commercial	23	10	3	10	6	4	1	2	10	0	7	16
	13%	14%	9%	12%	10%	40%	4%	40%	14%	0%	8%	17%
In a magazine	23	11	2	10	8	3	2	0	10	0	15	8
	13%	16%	6%	12%	13%	30%	7%	0%	14%	0%	17%	9%
Advertisement in a newspaper	20	6	0	14	3	3	0	0	13	1	11	9
	11%	9%	0%	17%	5%	30%	0%	0%	18%	11%	12%	10%
From a leaflet or brochures	18	8	1	9	5	3	1	0	9	0	8	10
	10%	11%	3%	11%	8%	30%	4%	0%	12%	0%	9%	11%
Radio advertisement	16	3	5	8	2	1	2	3	8	0	9	7
	9%	4%	16%	10%	3%	10%	7%	60%	11%	0%	10%	7%
Attended a lecture, class or study/at school from a teacher	16	4	0	12	1	3	0	0	12	0	10	6
	9%	6%	0%	15%	2%	30%	0%	0%	16%	0%	11%	6%

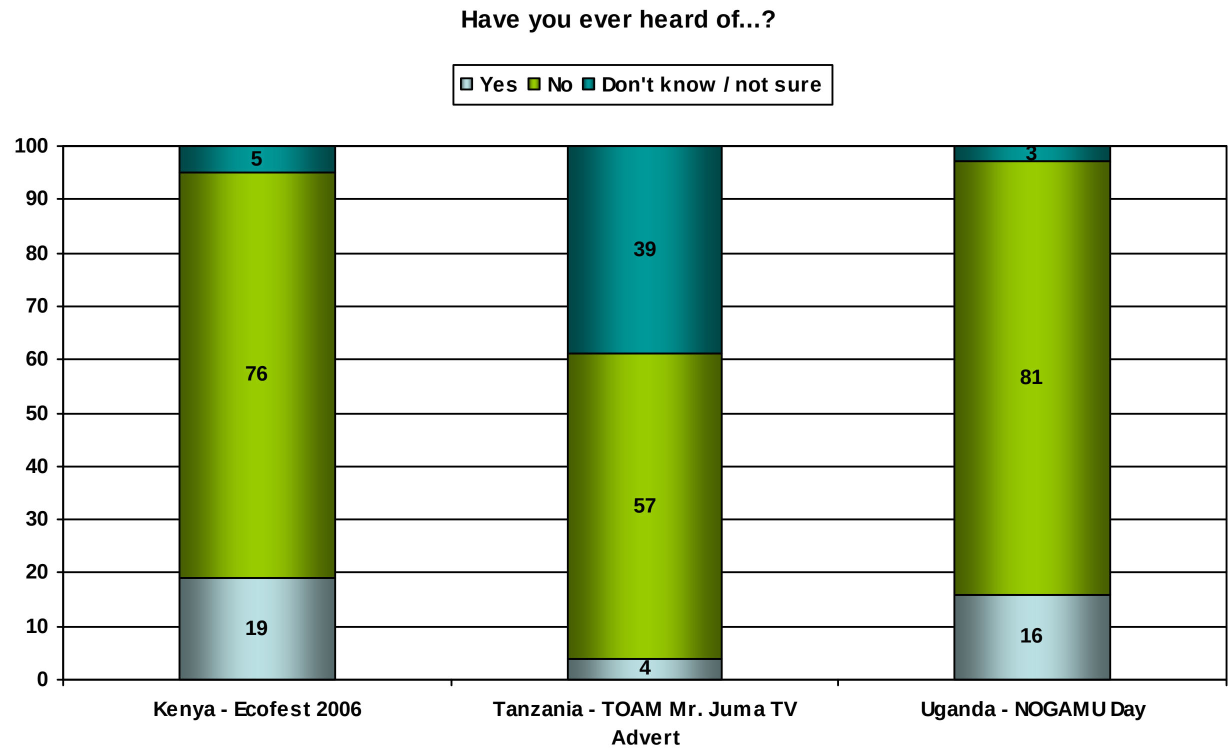
Majority 41% however were unable to describe the advert or information or remember the message or what in particular about organic food or farming the information or advert they had seen or heard was about. Those who could remember all had very varying responses or descriptions hence no significant percentages to report.

Respondents were also probed about specific adverts or promotional events on organic products or farming, one for each of the three countries. They were as follows:

Kenya: Ecofest 2006 – Musical event but with promotion of organic products
Uganda: NOGAMU Day
Tanzania: TOAM Mr. Juma TV Advert

The findings were as follows:

Fig 8: Whether the respondents have heard of any Organic advert



As can be seen in the chart above, awareness levels of these promotions were quite low despite them having been singled out as 3 of the major or key promotional items on organic products / farming in the 3 countries by the organic movements in the same countries. Majority of those who said they were aware were upper socio-economic class ABC1 as opposed to C2D. Those who said they had ever heard of these adverts / promotions or events were further asked what messages came through to them. Majority across the three countries however could not remember nor were they sure what the messages were.

In Kenya 75% of the 39 people who were aware of Ecofest said they did not know or were not sure what the message was, 10% cited that people were encouraged to appreciate and take care of the environment, 8% said that people were encouraged to eat organic foods with entertainment as the medium of communication, 3% said it was about the importance of organic foods, and another 3% said it was about healthy living.

In Tanzania, out of the 8 people who were aware of the Mr. Juma TV advert, 3 of them said they did not know or could not remember the message, 2 said it was promoting organic farming and 3 said it was on the importance of consuming organic products.

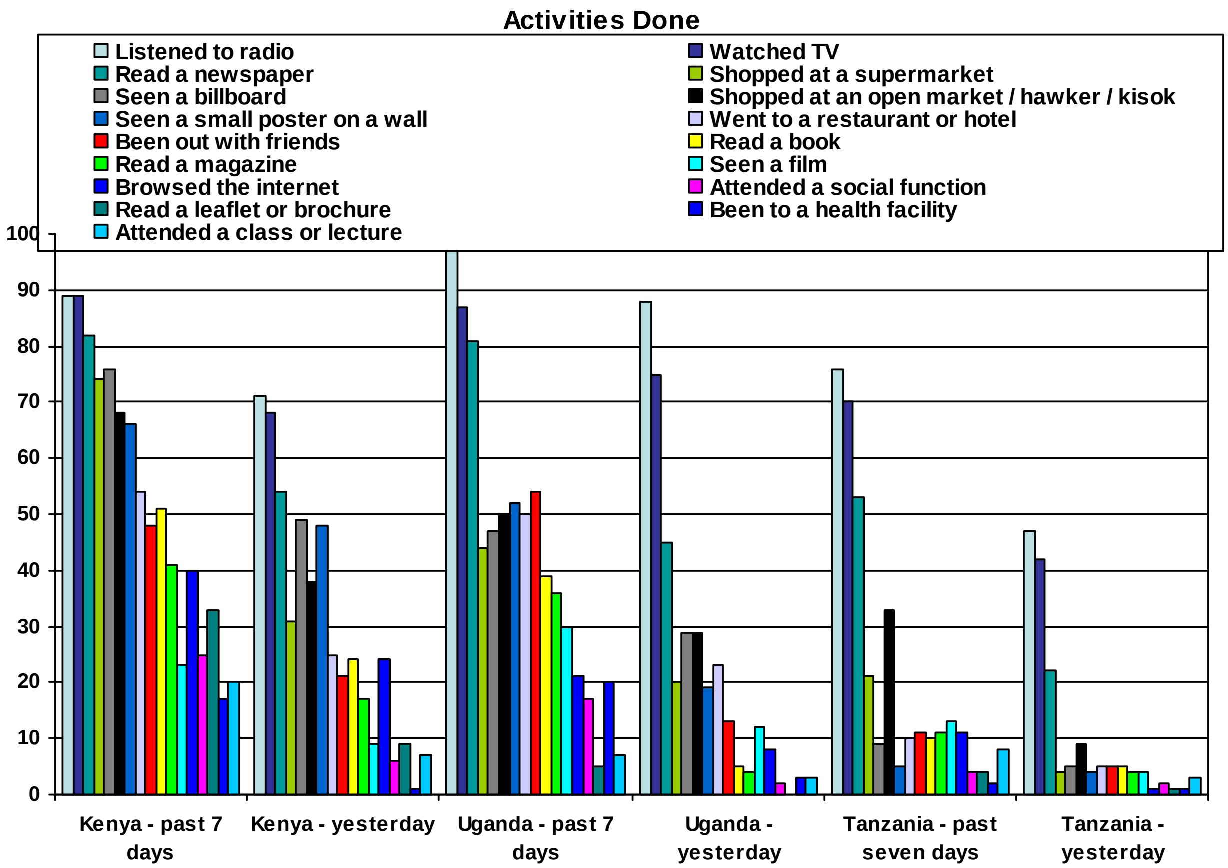
In Uganda, 68% of the 31 people who had heard of NOGAMU Day did not know or were not sure what it was about, 13% said it was promoting organic farming, 6% said it was about importance of usage of organic products, another 6% mentioned that it was education on how organic products can be preserved by solar. 3% said it was something to do with pesticides while another 3% talked of it being about explaining the organization structure of NOGAMU.

Those who were aware of the advert / promotion events were also asked to give a liking score out of 10. Ecofest scored 4.7 out of 10, Mr. Juma TV advert scored 6 out of 10, while NOGAMU Day scored 7.5 out of 10.

4.24 Media Usage and Habits

Respondents were also asked about their activities in the past seven days versus the previous day as a way of gauging what media consumers mostly come into contact with. The findings are shown in the chart below country by country:

Figure 9: Media Activities for the last seven days by the Respondents



Radio stations that were most often listened to in the past 7 days in Kenya were, Kiss FM 16%, Capital FM 11%, Classic FM 11%, Easy FM, Baraka FM, and KBC Kiswahili at 7%, followed by Hope FM and Metro FM both at 6%.

In Tanzania most often listened to radio stations in the past seven days were Radio one 36%, followed by Radio Tanzania 16%, Clouds FM 12%, and Radio Tumaini at 7%.

In Uganda most often listened to radio stations in the past seven days were Radio Simba 21%, CBS One 19%, Capital FM 9%, KFM 8%, Akaboozi 7%and Radio Maria at 6%.

These would be key stations to target during promotions or campaigns although it is important to note that this survey was purely urban hence if a rural population is also to be targeted these or even other stations would need to be considered in different strengths.

TV stations most often watched in the past seven days were as follows

Kenya – KTN 34%, NTV 29%, DSTV 13%, KBC 13%.
Tanzania – ITV 42%, TVT 20%, Star TV 11%, Channel 10 10%.
Uganda – WBS 68%, UTV 11%, EATV 9%, DSTV 7%.

Newspapers read most often in the past seven days were as follows:
Kenya – Daily Nation 83%, The Standard 9%.
Tanzania – Mwananchi 22%, Majira 19%, Mtanzania 14%, Nipashe 9%.
Uganda – New Vision 52%, The Monitor 25%, Bukkedde 22%.

Again these would be key TV stations and newspapers to use for a campaign keeping in mind the urban bias of the survey.

Table 10: Media usage is provided in the table below by socio-economic class and education level:

	AB	C1	C2	D	E	No formal schooling	Informal schooling only	Some primary schooling	Primary school completed	Some secondary school/high school	Secondary school/high school completed	Post-secondary qualifications, other than university	Some university	University completed	Post-graduate
KENYA RADIO MOST OFTEN LISTENED TO															
Kiss FM	24%	15%	17%	4%	0%	-	0%	0%	0%	29%	10%	13%	33%	13%	50%
Capital FM	10%	20%	4%	8%	0%	-	0%	0%	0%	0%	10%	10%	22%	22%	10%
Classic FM	14%	7%	11%	8%	14%	-	0%	0%	0%	0%	10%	15%	22%	13%	0%
Easy FM	10%	13%	2%	4%	0%	-	0%	0%	0%	0%	5%	10%	11%	13%	0%
Baraka FM	5%	2%	13%	4%	14%	-	0%	33%	0%	21%	5%	7%	0%	0%	10%
KBC-Kiswahili	2%	2%	9%	13%	29%	-	67%	0%	22%	14%	12%	0%	0%	0%	10%
Hope FM	10%	6%	4%	8%	0%	-	0%	0%	0%	0%	12%	6%	11%	4%	0%
KENYA TV MOST OFTEN WATCHED															
KTN	24%	48%	37%	23%	0%	0%	0%	67%	10%	24%	45%	38%	30%	25%	40%
NTV	29%	25%	37%	23%	17%	0%	0%	0%	20%	35%	29%	36%	30%	17%	20%
DSTV	36%	11%	2%	0%	0%	0%	0%	0%	0%	0%	5%	9%	10%	42%	40%
KBC	4%	9%	12%	32%	50%	0%	100 %	0%	40%	12%	13%	11%	20%	0%	10%
TANZANIA RADIO MOST OFTEN LISTENED TO															
Radio One	56%	31%	31%	44%	60%	45%	0%	26%	27%	33%	40%	32%	50%	67%	-
Radio Tanzania	11%	22%	17%	8%	20%	27%	40%	11%	9%	17%	23%	11%	0%	0%	-
Clouds FM	0%	9%	13%	12%	20%	0%	0%	16%	18%	6%	13%	26%	0%	33%	-
Radio Tumaini	0%	6%	9%	8%	0%	0%	0%	11%	18%	0%	4%	11%	17%	0%	-
TANZANIA TV MOST OFTEN WATCHED															
ITV	27%	39%	39%	53%	67%	0%	0%	53%	13%	19%	62%	44%	33%	25%	-
TVT	36%	19%	19%	21%	8%	22%	17%	12%	38%	44%	18%	19%	0%	25%	-
Star TV	9%	19%	10%	0%	17%	22%	0%	6%	13%	13%	16%	0%	33%	0%	-
Channel 10	9%	10%	9%	16%	17%	11%	0%	6%	0%	6%	16%	19%	0%	25%	-
East Africa TV	0%	10%	3%	11%	8%	0%	0%	12%	13%	6%	7%	6%	0%	0%	-
UGANDA RADIO MOST OFTEN LISTENED TO															
Radio Simba	13%	22%	26%	29%	0%	0%	0%	18%	35%	24%	17%	24%	20%	20%	-
CBS One	13%	19%	32%	16%	0%	0%	67%	27%	25%	12%	23%	21%	0%	10%	-

Capital FM	15%	14%	3%	0%	0%	0%	0%	9%	0%	10%	11%	6%	40%	10%	-
KFM	8%	11%	8%	3%	0%	0%	0%	9%	0%	7%	9%	18%	0%	10%	-
Akaboozi Radio 2	8%	6%	3%	6%	40%	0%	0%	18%	20%	7%	0%	9%	0%	0%	-
Kiira FM	0%	3%	11%	13%	40%	100 %	0%	9%	5%	15%	2%	3%	0%	0%	-
UGANDA TV MOST OFTEN WATCHED															
WBS	55%	70%	85%	65%	75%	-	-	83%	60%	71%	60%	81%	50%	70%	-
UTV	13%	8%	7%	17%	25%	-	-	0%	13%	16%	13%	10%	0%	0%	-
East Africa TV	8%	9%	15%	9%	0%	-	-	17%	27%	3%	11%	6%	50%	0%	-
DSTV	16%	8%	0%	0%	0%	-	-	0%	7%	3%	6%	3%	0%	20%	-

5. Qualitative Survey Findings

5.11 General Business Issues In Relation To Customer Preferences

The key informants were asked to state the three most common issues they encounter in their business as relating to consumers' preferences of food products. The following issues were mentioned by most:

- High quality products
- Service – quick, efficient & professional
- Availability of products / supply
- Price / affordability
- Variety of products to select from
- Consistency of quality and supply
- Origin / source of product – is it credible / trustworthy?

5.12 Issues Taken Into Consideration when Stocking Organic Food

In relation to that the key informants were also asked to state the three common issues they take into consideration thus when stocking up on food products to sell to their customers. The following were mentioned most:

- High quality of products
- Demand for the products – is there high demand amongst their customers for that type of products?
- Availability / supply side issues – is there a reliable and consistent flow from suppliers so that they do not end up disappointing their customers?
- Price – are these products affordable to them as business people and hence can still remain affordable to the end consumer even with them making a reasonable margin from the sale of the products?
- Variety – because customers' preferences are varied hence try to cater for most needs and demands

These issues were common across the three countries and across the different types of key informants. What emerges here is that what drives business decisions is customer needs or preferences.

5.21 Attitudes towards Organic Foods

Key informants were also asked to share their views on organic foods. Majority were of the opinion that organic foods are very healthy and nutritious because they are natural, and free from chemical residues. Most said that these foods are of high quality as compared to non-organic and some even said that they are tastier. Some mentioned that consumption of organic products is an emerging world trend and consumers who have learnt about it and discovered its benefits are very keen about it and prefer to consume organic. Others said that although organic foods present very attractive benefits of consumption, they are significantly more expensive than the non-organic hence most who consume them are middle to upper class persons.

When asked what they sell, organic or non-organic, most said that they sell both but more of non-organic and the main reason for this was that they complained there is very limited and unreliable supply of organic products. Additionally the demand they said is not very high because most people do not know or understand much about what organic products are and so are not asking specifically for organic products. Those who know are few and amongst these the demand is high but overall demand for organic products is low. The higher prices of organic were also a deterrent factor to some key informants who said that they would not make as good margins on these products as they would the non-organic.

Thus most key informants admitted that despite themselves knowing the value and benefit of organic, do not place a high priority as such to stocking organic; they are mostly driven by consumer demand and since most consumers do not demand organic then they cannot give priority to organic. A few key informants however said they give 100% priority to organic products but these were the ones whose businesses were started solely as organic product outfits e.g. some greengrocers and restaurants in Kenya.

When asked how they ensure what they are stocking is organic, most said that they but from specific organic farmers or manufacturers. Others said they have their own rigorous systems of checking the suppliers. However a few mentioned that they were not necessarily sure about the sources given that there are no proper verification systems in place in East Africa as compared to Europe.

The respondents who said they stock or sell some organic products were also asked to say how satisfied they are with the organic products they stock in terms of quality, price and availability. A majority expressed high satisfaction level in as far as quality is concerned saying that their customers who were purchasing organic were very happy with the quality. However in terms of price and availability majority expressed quite a high level of dissatisfaction saying that organic was costly meaning that these products would not move fast enough because they were being bought by the upper social classes mostly and even then the margins on these products were not great. Also on availability suppliers were few and unreliable and this reflects very negatively on them to their customers when they fail to deliver. A respondent from a supermarket said that they had over 60 codes for organic products which had gone dormant because of supply issues.

On what would motivate them to sell more organic, most said that if consumers were educated and hence started demanding organic more then they definitely would also seek to sell organic more to meet consumer demand. Also if supply issues could be improved upon in order to meet the demand, this would motivate them to sell more organic.

5.22 Consumer Awareness Building and Education On Organic Products

Key informants were asked to give their opinion on what key issues consumers should be educated on concerning organic farming. An overwhelming majority said that the consumers simply need to be educated on what organic farming and products are all about and more so what the benefits of consumption are. Most key informants believed that if only more consumers knew, they would definitely prefer to consume organic products as opposed to non-organic. This knowledge they felt would best be imparted through the mass media;

Radio, TV and newspapers, and the bearers of this message should be producers, suppliers and manufacturers with governments also participating particular line ministries such a health, trade, agriculture. Other participants could be NGOs also involved in health and / or agricultural issues.

Asked whether they as business people in the food industry have played any role in trying to promote organic products, majority answered in the affirmative although clarifying that what they had been able to do was very small scale mostly within their own business premises. They cited examples such as fliers and brochures, providing separate shelves for organic products and also educating their key staff on them so that they can explain to the consumers.

5.24 Verification Systems

On how their customers verify that the products are organic, most said that they provide designated places in the business premises for organic products or menus for restaurants and hotels so when their consumers selected from these designated places, they know they are selecting organic products. Others also said that the organic products are clearly labeled as such while some said that the consumers ask for their guidance on what is organic vs. non-organic. Generally they said their customers are comfortable with these methods of verification but sometimes ask a lot of questions about the source so as to be completely reassured.

Most key informants were not aware of the available standards of organic products nor whether their suppliers had certification on this save for the Kenya Bureau of Standards, certification mentioned by some. A few whose businesses are solely organic were aware of organic standards and whether or not the suppliers were certified.

6. Conclusions and Recommendations

There is rather a high lack of awareness in East Africa of organic foods or organic farming. Many don’t know or are not sure what it is and even most of those who say they do are in reality not fully conversant with what organic really entails. When some facts are displayed to them it becomes evident by their own admittance that indeed awareness is low. Majority of those who are unaware belong to the lower socio-economic classes and because they form a larger proportion of the population, awareness in the region can be termed as low overall. It is not surprising therefore that consumption levels are modest or low; slightly over half the sample have never consumed nor considered consuming organic as what is not in the mindset, cannot be in the consideration set. Tanzania seemed to score dismally in the awareness score, consumption score. As compared to other East African countries Tanzania registered 57%, followed by Kenya (44%) of respondents who indicated they are not aware of organic foods. Uganda respondents seemed to score highly in all areas (only 13% said they don’t know). It shows therefore that the awareness creation in Uganda is significant and bearing fruits. This also corresponds to the number of respondents who have heard or seen advertisement or promotion materials regarding organic food. As shown below Tanzania registered the majority of those who are not sure (39%) followed by Uganda (3%) and Kenya (2%). Out of the respondents, Uganda had the highest percentage of those who have seen or heard organic agriculture information (42%).Their strategy therefore needs to be shared with the other East African partners

Table 11: Over the past 1 year, have you been told, heard, seen or read any information or advertising relating to organic farming or organic food products?

	Yes	No	Not sure
Kenya	35	63	2
Uganda	42	55	3
Tanzania	16	45	39

However as the silver lining on the cloud, it is important to note that as implied by the findings, there may not be any other 'real' barriers to consumption given that majority of those who have never consumed or considered consuming don't have any particular reason for this or are just indifferent. This means that were they made fully aware of what organic products are and their benefits, they might be more inclined to consume. Of course the products must also be made available since as consumers' knowledge and awareness increases, this will be expected to lead to an increase in demand yet there seems to be a gap in the East Africa market where many key informants are of the view that availability is a serious issue – there are not enough suppliers and the few who are there are not reliable enough.

When broken down into specific types of organic foods people have ever consumed, an overwhelming majority talk of fruits and vegetables and a significant number mention cereals. As per the findings, organic dairy, meats, pasta and bread, are little consumed and again this can be linked to an awareness issue. It seems that many might be holding a misconception that organic produce can not be anything else other than fruits and vegetables although this was not specifically tested in the study. Key motivating factors of consumption are health and safety factors and these could well be the promotional pillars for building or increasing organic consumption in East Africa. This notion is strengthened by the fact that when speaking about purchasing of food products in general, some of the top considerations are health and safety issues for most. Price is however also a top consideration and this must be looked into given that key informants complained that price of organic is considerably higher than that of non-organic foods. This result seemed to correlate with Envirocare survey by Sogn O. and et al 2006, carried out in Tanzania where the issue of safety in food also and health concern came out clearly.

Still, despite awareness levels being low and by extension consumption incidence, perceptions and attitudes towards organic foods appears to be quite positive. This is evident from the reactions to the working definition or description of organic products. Once the respondents are exposed to this, an overwhelming majority say that indeed organic products are a good thing and also give a high score on the importance scale saying that knowing what they now know, it would be very important to them that what they consume is organic. This is true even of those who have never consumed nor considered consuming organic.

On verification systems, many feel that there should be some kind of verification system for organic products in the region thus this is an issue that should indeed be pursued and actualized. The country governments would be crucial in this process or system as many view them as the suitable frontrunners in this endeavour.

Indeed organic products' promotional and educational initiatives are lacking in the region as implied by the low awareness and consumption levels of organic foods but more so as evidenced by analysis of the post-test of such promotional and educational activities. Majority say they have not heard or seen any information on organic products in the last one year or so and those who claim they have are unable to describe or recall the messages being passed across. This is as per the consumer study findings yet from information compiled by KOAN, NOGAMU and TOAM, it is apparent that there are quite a lot of initiatives going on in the three countries in terms of education or promotion of organic as can be seen in the table below. It can be inferred that despite the existence of these initiatives, there may not be enough exposure or perhaps effective delivery of them hence little or no impact. Other than the mass-media ones, most of these initiatives have also not been done on a very large scale so perhaps cannot be expected to have a great national or regional impact.

Table 11: Existing PR materials

	MATERIAL	**DESCRIPTION & MESSAGE**
KENYA		
1	10 Reasons to go Organic	Poster that elaborates the reasons why one should consume organic products
2	Kenya Organic Agriculture Network	Brochure Gives general background about KOAN, activities and programs
3	KOAN Organic Marketing Assistance Program	Brochure that elaborates on OMAP, its mission, vision and objectives
4	Kenya Organic Catalogue	Small booklet on organic production and producers in Kenya
5	Ecofest 2005/6	Fun-filled day highlighting issues on organic food and environmental sustainability
6	Public Talk	Open talk and debate on issues on organic agriculture
7	Radio questions and answer session	Held over a 5 day period on one radio station where questions related to OA were asked with correct answers getting gift packs of organic products
8	Radio Program Mali Shambani	Radio program on KBC where experts in OA are interviewed and listeners phone in with questions
9	Farmers Market	Exhibitions where farmers are able to interact with consumers and learn about OA
	UGANDA	
1	NOGAMU brochure	The vision mission and objectives
2	NOGAMU shop fliers	Message on them is benefits of organic and products available

3	NOGAMU bulletin	This is a quarterly newsletter that highlights activities implemented, research done and any relevant information about organic members would wish to share out
4	Posters, stand flags, year calendars and planners, t-shits, caps, pens and key rings	Basic organic messages and pictures of events in the organic sector
	TANZANIA	
1	Stickers / banners	Go organic hile you live, I say when you die you will be organic anyway Fine nature makes fine country – a lover of nature
2	T-shirts, jackets, caps	Organic for sustainable life; go organic
3	Booklets / leaflets	Kanuni za kilimohai Kudhibiti mmomonyoko wa udongo
4	Posters	Njia za kudhibiti mmomonyoko wa udongo; Njia za kuvuma maji ya mvua kwa matumizi ya shambani Madhara ya mmomonyoko wa udomgo Kurutubisha ardhi kwa kutumia mbolea ya asili
5	Books	Udongo hai na mbolea asili
6	Advert	Bio-organics The good get better.. energize the plants immune system
7	Organics directory	Contact list and roles of organic stakeholders
8	Magazines	Eco Forum; Ecology and farming – the war on pests and problem with poisons, growing organic, etc
9	Video and TV	Grocery store wars

Even the three selected initiatives (one per country) perceived prior to this study to be ‘key’ or ‘somewhat substantial’ performed rather dismally in awareness hence can be concluded as not having met their desired impact. A widespread educational and awareness building campaign to increase awareness in the region on organic products and their benefits is therefore in order. Not only should it be carefully and professionally developed to but also well executed. Key informational areas that should be taken into consideration for such a campaign are:

- Defining and describing clearly what organic farming / products entail versus non-organic. This should target the 62% of the population who indicated they don’t know what organic foods are. The campaign should also focus more on middle to high income social class who indicated 25% knowledge of organic products.
- Explaining and demonstrating distinctly the benefits of consuming organic foods. To capture the interests of consumers, the health and safety aspects should Cleary come out of campaign. This is because it scored the highest as a motivator of the current organic consumers (Scored more than 50% in all the products consumed)
- Educating consumers on how best to identify organic products. Promotion of organic products using a mark or logo to identify them should also be considered. Some consumers even after being asked whether they have consumed some presented organic products could not tell whether they are organic or not. Only 44% of the consumers of Out of Africa coffee the highest consumed organic products among the ones presented indicated they know it is organic. This was also seen in Tanzania where Tanika coffee

was the most significantly consumed organic product. There is therefore a need for verification system (69%), which should also provide a marketing logo. In the usage of such a logo, the government should be involved (51%) in regulating it together with an independent body (19%).

- Informing consumers on where they can buy organic products or where they are available. Availability was a big issue and also information of where consumers can buy organic food. Awareness creation should focus on informing consumers where they should buy organic products. Promotion through stores already selling organic foods will therefore be desirable.

So as to reach as many people as possible a relationship between what was regarded as popular source of organic information and indicated successful PR materials should be considered. If this information is passed through the popular mode amongst the target population, the awareness will be successful. The table below shows such relationship.

Table 12: Relation between Existing PR materials and their Popularity.

Most popular sources of organic Information	**Indicated successful PR Materials**	**Popular Media**
Radio program or news	• Radio program Mali Shambani-Kenya	• Kenya - Kiss FM, Capital FM, Classic FM • Tanzania -Radio one, Radio Tanzania, Clouds FM. • Uganda- Radio Simba, CBS One, Capital FM.
TV program or news	• Video/TV/Radio-Tanzania	• KTN, NTV, DSTV. • ITV, TVT, Star TV. • WBS, UTV 11, EATV
In a book; written materials, pamphlets, brochures.	• Booklets/leaflets-Tanzania • 10 reasons to go organic Poster-Kenya • Shop leaflets and fliers-Uganda • Newsletter-Uganda	
newspaper in the general, news section/stories		• Daily Nation, The Standard • Mwananchi, Majira. • New Vision, The Monitor.
	• Ecofest 2005/6	•
	• T- shirts/Caps/Stickers	•
	• shirts, key rings and pens,	•
	• Calendars	•

The above relation will therefore be very crucial when making decisions on the consumer awareness and consumer education and which media to use.

Table 13: Relation between considerations of purchasing food products and values associated with organic Produce

Considerations of Purchasing Food products	Association of Organic food products
Healthy/Nutrition	Healthy/Nutritious (50%)
Quality	Safe (25%)
Taste	Tasty (21%)
Availability	
Packaging size	
Brand name	

The above 3: Health/Nutrition, Quality/safety, Tasty should form the main coding of the 'Organic message'.

Table 14: How best the Organic Information can be imparted

Formats	Promotional events: Ecofest, NOGAMU day
Types of Media	Radio,TV, newspapers, pamphlets, fliers
Message Bearers	Producers, Suppliers Manufacturers Governments, NGOs
Participants/Stakeholders	Organic movements, traders, producers, partners

7. Appendices

7.1 Annex 1: Survey Instruments (Questionnaire)

A SURVEY ON CONSUMER ATTITUDES AND PREFERENCES TOWARDS ORGANIC FOODS IN KENYA, UGANDA AND TANZANIA, OCTOBER - NOVEMBER 2006

Respondent's name (complete at end of interview)____ PO Box____ Telephone Number/s____	
Write in a detailed description of how to reach the respondent again. Include landmarks like nearest school, church, sub-chief.	
Interviewer's name Time Interview Began ______________________ Ended ____________________ Interview length (In mins) ____________________	
I declare that this interview has been carried out strictly in accordance with the training I received in every respect, with a properly selected respondent.	Interviewers signature.

Country

Kenya	1	**Tanzania**	2	**Uganda**	3

Town

Nairobi	**1**	**Dar es Salaam**	**3**	**Kampala**	**5**
Mombasa	**2**	**Zanzibar**	**4**	**Jinja**	**6**

Sample point number:

<u>START HERE: SAMPLING</u>

<u>1) Speak to any adult at the selected household</u>

<u>Write down first name of the adult spoken with</u>: ______________________________

<u>S1) Read out introduction</u>

Hello, my name is _________________. Today we're conducting a survey on general consumer perceptions and attitudes towards food products and we're interested in your opinions. We have selected your household by chance from this area. Please speak your views freely because whatever you say is confidential - we are combining your views with those of hundreds of others who are also being interviewed. There is no right or wrong answer – it is just your honest views we are interested in.

<u>Only if necessary</u>: The research is being funded by International Federation of Organic Agriculture Movements as part of its preparation to create awareness of East African Organic Standards. The survey is being carried out in Kenyan, Tanzania and Uganda.

<u>2) Randomly select one person who lives there, even if not at home at present</u>

S2) Please could you tell me the first names of each adult aged 18 or over who lives here in this household (sharing food), and who has been living here for at least 4 weeks, starting from the oldest down to the youngest.

List all the adults in the household here	Assign numbers to each person according to alphabetical order e.g. name that starts with A = 1
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	

Select the respondent assigned number 1 in the table above.

NOW COMPLETE THE AGE, GENDER, AND EDUCATION LEVEL GROUP OF YOUR SELECTED RESPONDENT IN THE TABLE BELOW AT S5.

NOW YOU **<u>MUST</u>** FIND THAT PERSON TO INTERVIEW. IF THAT PERSON IS NOT AT HOME, YOU MUST ARRANGE TO COME BACK A SECOND AND A THIRD TIME TO GET HIM OR HER OVER A TWO-DAY PERIOD**.**

ONLY IF HE/SHE IS STILL NOT AVAILABLE, SUBSTITUTE THE RESPONDENT FOR A PERSON OF THE SAME AGE GROUP, GENDER AND EDUCATION LEVEL GROUP FROM THE SAME SAMPLING POINT.

IF THE RESPONDENT REFUSES TO BE INTERVIEWED, CONTINUE WITH THE RANDOM ROUTE AND INTERVIEW THE NEXT RANDOMLY SELECTED RESPONDENT.

PLEASE REFER TO YOUR NOTES IF YOU CANNOT REMEMBER

S3) Please could I find that person and arrange to speak with them? ***Either go to where that person is, or arrange to come back later to speak with them later today***

Made appointment to come back later	1	Write in time & location of appointment. Skip 2 households and then proceed with a new questionnaire
Went to where the person is and found them	2	Proceed to QA1
Other ***Write In***	3	

S4) Code how many visits you have had to make to the house / other locations in order to get this person

First attempt	1	
Second attempt	2	
Third attempt	3	After three attempts to get this respondent, you may make a substitution. Go to S5

S5) Could you tell me the gender, age and educational level of _______ ***The respondent you were trying to interview***

Gender		**Age**		**Achieved educational level**	
Male	1	18-24	1	Has no education	1
Female	2	25-34	2	Has some or complete primary	2
		35-44	3	Has some or complete secondary or other higher qualifications but not university	3
		45-55	4	Has university or college education	4
		56+	5		

S6) ***If substituting.***

- The aim here is to find another respondent in this area who has the same age, educational level and gender as the person selected.
- Check question S5 above,
- Proceed to the next door household
- Repeat the introduction
- Ask: Is there anyone in this household who is _______ (gender), aged ________ , and who has __________ education?
- Once you have identified a similar person, continue to Q1.

Remember that the first box of the questionnaire on page 1 should be filled for the person you finally interview, not for the person you originally tried to interview.

Repeat introduction if necessary

A. AWARENESS & USAGE

A1) Could you please tell me, what do you understand by the term 'organic foods'? What do you think they are? ***Do not read out responses, more than one answer possible***

Natural foods	1	Continue
Herbal foods	2	
Foods grown with manure	3	
Foods without chemicals	4	
Foods not sprayed with pesticides	5	
Traditional / indigenous foods	6	
Healthy / nutritious foods	7	
OTHERS ***(Write in specific response)***		

Don't know / not sure ***(Do not read out)***	99	Go to A3

A2) From where did you get to learn that 'organic foods' are _______________ ***(mention answers given in A1 above)***, in other words what was your source of information? ***Do not read out responses, more than one answer possible***

	Natural	Herbal	Grown with manure	Without chemicals	Not sprayed with pesticides	Traditional / indigenous	Healthy / nutritious	Other (specify)
Television programmes /adverts	1	1	1	1	1	1	1	1
Radio programmes / adverts	2	2	2	2	2	2	2	2
Newspaper	3	3	3	3	3	3	3	3
Magazines	4	4	4	4	4	4	4	4
Books	5	5	5	5	5	5	5	5
Taught in school / college	6	6	6	6	6	6	6	6
At a promotional / educational event	7	7	7	7	7	7	7	7
Word of mouth	8	8	8	8	8	8	8	8
OTHERS ***(Write in specific response)***								
Don't know / not sure ***(Do not read out)***	99	99	99	99	99	99	99	99

A3) I am now going to read out a true set of statements about organic food products one by one and I want you to tell me whether you are aware of this or not by simply saying yes or no. Did you know that_________________ ***(read statements in table below one by one)***

		Yes	**No**
a	There are local standards for organic products?	1	2
b	There is an organic certification body in Kenya / Tanzania / Uganda?	1	2
c	There is a national organic movement in Kenya called KOAN? (in Tanzania called TOAM / in Uganda called NOGAMU?)	1	2
d	Organic products should be identified by a logo	1	2

A4) Have you ever consumed or considered consuming 'organic food products'? ***Read out and code appropriately***

Yes - have consumed	1	Continue
Yes - have considered consuming	2	
No	3	Go to A5
Don't know / not sure ***(Do not read out)***	99	Go to A6

A4b) Which types of organic food products have you ever consumed or considered consuming? ***Read out and code as appropriate. Multiple response allowed***

Organic dairy products	1
Organic fruits and vegetables	2
Organic cereals	3
Organic bread and pasta	4
Organic meat and meat products	5

A4c) Why do you / did you consume or why have you ever considered consuming _______ ***(mention type of organic food product coded in A4b above)***? ***Do not read out responses***

Reasons	**Dairy**	**Fruits & Veg**	**Cereal**	**Bread & Pasta**	**Meat**
They are tasty	1	1	1	1	1
They are healthy / nutritious	2	2	2	2	2
They are safe to consume / not contaminated	3	3	3	3	3

They are affordable	4	4	4	4	4
They are readily available	5	5	5	5	5
Good for management of illnesses	6	6	6	6	6
Makes me feel in touch with my indigenous roots	7	7	7	7	7
They are environmental friendly	8	8	8	8	8
No specific reason / indifferent	9	9	9	9	9
OTHERS ***(Write in specific response)***					

A5) Why have you never consumed or considered consuming organic food products? ***Do not read out responses***

They are not tasty	1
They are not healthy / nutritious	2
They are unsafe	3
They are expensive	4
They are not available / don't know where to get them	5
No specific reason / indifferent	6
OTHERS ***(Write in specific response)***	

For those coded 1 and 2 at A4 ask A5b and A5c otherwise skip to A6

A5b) Where do you / would you prefer to purchase your organic food products from? **MULTIPLE RESPONSES ALLOWED. DO NOT READ OUT**

A5c) Where do you / would you not purchase your organic food products from? **MULTIPLE RESPONSES ALLOWED. DO NOT READ OUT**

	A5b	**A5c**
Supermarkets	1	1
Greengrocers	2	2
Hotels	3	3
Restaurants	4	4
Open air markets	5	5
Farm gate	6	6
Dukas / kiosks	7	7
Don't know / not sure ***(Do not read out)***	99	99
OTHERS ***(Write in specific response)***		

A6) Have you ever heard of the following products? ***Code answers in the grid below. Ask only for brands relevant to country where you are conducting the survey e.g. if in Kenya ask only about Kenya brands***

A7) ***For all those products aware of at A6 ask:*** Did you know that _____________ ***(mention product)*** is an organic product? ***Code answers in the grid below***

A8) ***For all those products aware of at A6 ask:*** Have you ever consumed ________ ***(mention product)***? ***Code answers in the grid below***

A9) ***For all those products aware of at A6 and for which they are aware are organic at A7 ask:*** Was the fact that _____________ ***(mention product)*** is an organic product have anything to do with your decision to consume it? ***Code answers in the grid below***

		A6		A7		A8		A9	
	KENYA PRODUCTS (BRANDS)	**YES**	**NO**	**YES**	**NO**	**YES**	**NO**	**YES**	**NO**
a	Out of Africa Coffee	1	2	1	2	1	2	1	2
b	Meru Herbs Chamomile Tea	1	2	1	2	1	2	1	2
c	Green Dreams Vegetables	1	2	1	2	1	2	1	2
	TANZANIA PRODUCTS (BRANDS)	**YES**	**NO**	**YES**	**NO**	**YES**	**NO**	**YES**	**NO**

d	Tanika Coffee	1	2	1	2	1	2	1	2
e		1	2	1	2	1	2	1	2
f		1	2	1	2	1	2	1	2
	UGANDA PRODUCTS (BRANDS)	**YES**	**NO**	**YES**	**NO**	**YES**	**NO**	**YES**	**NO**
g	Tefu Solar Dried Fruits	1	2	1	2	1	2	1	2
h	Mop Solar Dried Fruits	1	2	1	2	1	2	1	2
i	Amfri Solar Dried Fruits	1	2	1	2	1	2	1	2

Ask All
A10) Thinking about purchasing of food products in general, I would like you to tell me what you take into consideration. Please rank the following considerations in order of priority from the most important to the least important. ***Write in the order from 1 to 7 in the column next to the attributes***

Price / affordability	
Packaging (quality)	
Packaging (size)	
Availability	
Health / nutrition value	
Taste	
Brand name	

Ask those coded 1 and 2 at Q.A4, others go to B1
A11) How do you / would you verify or know that the foods you are buying / consuming are organic? ***Read out. Record answers in the table below***

Ask for each method of verification mentioned at A11..
A12) Do you trust this method of verification of ____________ (mention method of verification)?

Record answers in the table below

	A11	**A12**		
		Yes	No	Don't know / not sure
Only purchase from specific shops that I know sell organic products	1	1	2	99
Check the labels	2	1	2	99
Buy from a specific farmer who practises organic farming	3	1	2	99
Practise my own organic farming	4	1	2	99
Only purchase specific brands which I know to be organic	5	1	2	99
OTHERS ***(Write in specific response)***		1	2	99
Don't know / not sure ***(Do not read out)***	99			

If coded 2 for any one of the verification methods at A12 above ask

A13) What do you feel could be done to improve your trust with ________________ (mention method of verification)?

Specific shops that sell organic products ***(Write In)***   Don't know / not sure 99
Labels ***(Write In)***   Don't know / not sure 99
Specific farmers who practice organic farming ***(Write In)***

Don’t know / not sure 99
Specific brands known to be organic ***(Write In)***   Don’t know / not sure 99
OTHER VERIFICATION METHOD ***(Write In)***   Don’t know / not sure 99

A 14) Do you think there is a need for a system of verification of organic food products?

Yes	1	Continue	No	2	Go to Section B

A14b) Who do you think should be responsible for providing this verification? **READ OUT**

The Government	1
Independent certification company	2
Companies buying from farmers	3
Groups of producers checking each other	4
NGO’s working with farmers	5
The producer himself	6
Don’t know / not sure ***(Do not read)***	99
OTHER ***(Write In Specific Response)***	

B. PERCEPTIONS AND ATTITUDES

Now I am going to give you a statement describing organic products. Please read it together with me as I read it out aloud to you then I will ask you some questions based on it.

“Organic produce or products are those produced and processed through a system that encourages biological natural processes on the farm, allows farm animals to exhibit natural behavior and excludes the use of synthetic pesticides, chemical fertilizers, antibiotics and genetically modified organisms.”

B1) Having read this statement, do you think organic products are a good thing or a bad thing?

Good thing	1	Continue
Bad thing	2	Go to B3
Both good and bad - have both positives and negatives	3	Continue
Don’t know / not sure ***(Do not read out)***	99	Continue

B2) What do you like about this statement in relation to organic products? ***Do not read out, more than one answer possible.***

B3) What do you dislike about this statement in relation to organic products? ***Do not read out, more than one answer possible.***

	B2	B3
Encouragement of biological natural processes	1	1
Farm animals allowed to exhibit natural behaviour	2	2
Exclusion of synthetic pesticides	3	3
Exclusion of chemical fertilisers	4	4
Exclusion of antibiotics	5	5
Exclusion of genetically modified organisms	6	6

Don't know / not sure ***(Do not read out)***	99	99

Ask All

B4) Having read this statement, to what extent would it now be important to you that the foods you consume are organic? Please tell me how important it would be on 1 to 10 point scale where 1 is not important at all and 10 is very important.

Increasing importance

1	2	3	4	5	6	7	8	9	10

B5) I have some short statements / attributes that different people have used to describe different types of foods. I am going to read them out to you and I would like you to tell me in your own opinion which of these statements is **most** suited to organic food. Please note that there is no right or wrong answer, it is just your opinion I am interested in. Which of the statements would you say is the **second most suited** to organic food? Which statement would you say is **the third most suited** to organic food?

	1st	2nd	3rd
Is very tasty	1	1	1
Is very nutritious / healthy	2	2	2
Is fashionable / trendy	3	3	3
Is affordable	4	4	4
Is for the elite	5	5	5
Is for everyone	6	6	6
Is safe	7	7	7
Is easily available	8	8	8
Is for the young	9	9	9
Is traditional	10	10	10

B6) Do you have any suggestions on what can be done to improve or support organic farming and the market for organic products?

None 99

C. POST TEST OF ORGANIC PRODUCTS AWARENESS & EDUCATIONAL MATERIALS

C1) Over the past 1 year, have you been told, heard, seen or read any information or advertising relating to organic farming or organic food products?

Yes	1	Continue	No	2	Go to C7	Don't know	99	Go to C7

C2) Please tell me all the different places you got this information. ***Show card or read out. Circle all mentioned probe for any other***

Packaging / products in a shop *Bidhaa zilizowekwa kwenye pakiti/ bidhaa kwenye duka*	01	Wall painting on a shop or similar *Kupaka ukuta rangi katika duka au shughuli inayofanana na hiyo*	15
Advice or discussion (any communication) with your friends / colleagues *Ushauri au majadiliano (mawasiliano yoyote) na rafiki zako*	02	In a book *Katika kasha*	16
At a social function / community meeting / baraza *Katika shughuli ya kijamii / mkutano wa jamii /baraza*	03	From a leaflet or brochures you saw somewhere *Kutoka kwenye kipeperushi au kijarida ulichoona mahali fulani*	17

From a health worker – like a doctor, nurse or nutritionist *Kutoka kwa mfanyakazi wa afya – k.m daktari, muuguzi au mfanyakazi wa jamii.*	04	Seen a film or advertisement at a cinema *Nimeona filamu au tangazo katika jumba la sinema*	18
From a community or political leader or elder *Kutoka katika jamii, au mwanasiasa au mzee*	05	Seen a film, program or advertisement at a video show room (where you pay to go), *Nimeona filamu. Kipindi au tangazo katika kumbi za filamu (ambapo unalipia kuingia)*	19
At church or from a church leader / mosque or Muslim leader / other religious leader *Katika kanisa au kutoka kwa kiongozi wa kanisa*	06	In a magazine *Katika jarida*	20
TV program or news *Kipindi cha TV au kipindi cha habari*	07	From the internet *Kutoka kwenye mtandao*	21
TV advertisement or commercial *Tangazo la Televisheni/au njia nyingine za matangazo mbali na tangazo la Televisheni*	08	Attended a lecture, class or study / at school from a teacher *Nimehudhuria mhadhara, darasani au mafunzo Shuleni kutoka kwa mwalimu*	22
Radio program or news *Kipindi cha redio au habari*	09	Seen a live drama / play or puppet show *Nimeona mchezo wa kuigiza moja kwa moja kutoka kwenye jukwaa*	23
Radio advertisement *Tangazo la biashara kutoka kwenye redio*	10	In an agricultural club *Kutoka kwenye kikundi cha shule*	24
In a newspaper in the general news section/stories *Katika gazeti kwenye sehemu ya habari kwa ujumla/hadithi*	11	Concert *sarakasi*	25
An advertisement in a newspaper *Tangazo katika gazeti*	12	Community rally/road show*maonyesho ya jamii/maonyesho ya barabarani*	26
Billboard – large poster on road side or side of building, *Bango – matangazo makubwa pembeni mwa barabara au kwenye kuta za majengo*	13	From an organic farming movement	27
A small poster like on a wall or similar (e.g. in hospital etc), *Tangazo dogo kama lililowekwa kwenye ukuta au linalofanana na hilo (k.m kama katika Hospitali)*	14	Don't know *Hajui*	99
		Other **WRITE IN FULL DETAILS** *Nyingine* ***ANDIKA MAELEZO KWA KIREFU***	

C3) Can you please describe the advertisement / material to me? ***Probe fully***

C4) Which messages do you remember from it? ***WRITE IN FULL DETAILS: PROBE: what exactly? Anything else?***

C3: Description:
Don't know / can't remember 99

C4: Messages:
Don’t know / can’t remember 99

C5) Did you believe the message as was communicated through this advert / material? Was it credible?

Yes	1	No	2	Don’t know	99

C6) I want you to tell me how much you liked the advert / promotion / informational material on a scale of 1 to 10 where 1 is didn’t like it at all and 10 is liked it very much.

1	2	3	4	5	6	7	8	9	10

C7) I am now going to mention to you an existing / past advertisement / promotional event / informational material on organic products in Kenya / Tanzania / Uganda. I will then ask you some questions about it.

KENYA	Ecofest 2005
TANZANIA	TOAM Mr. Juma’s TV advert.
UGANDA	NOGAMU Day.

C7a) Have you ever heard of / seen this advert / promotion / informational material?

Yes	1	Continue	No	2	Go to D1	Don’t know	99	Go to D1

C7b) Can you please describe it to me? Anything else? Probe fully

C7b): Description:
Don’t know / can’t remember 99

C7c) What messages do you remember from it / What did you learn from it?

C7c): Messages:
Don’t know / can’t remember 99

C7d) Did you believe the message as was communicated through this advert / material? Was it credible?

Yes	1	No	2	Don’t know	99

C7e) I want you to tell me how much you liked the advert / promotion / informational material on a scale of 1 to 10 where 1 is didn’t like it at all and 10 is liked it very much.

Increasing importance

1	2	3	4	5	6	7	8	9	10

D. MEDIA USAGE & HABITS

D1) I would like to ask you about your past 7 day activities in general, not relating to organic products. Which of the following have you done in the past seven days ***Show card or read out and rotate order of starting at each new respondent.***

D2) I would like to ask you about your yesterday activities in general, not relating to organic products. Which of the following did you do yesterday? ***Show card or read out and rotate order of starting at each new respondent.***

	D1	D2		D1	D2		D1	D2
Watched TV *Niliangalia TV*	01	01	Read a magazine *Nilisoma jarida*	08	08	Attended a lecture or class *Nilihudhuria darasa*	15	15
Listened to the radio *Nilisikiliza Redio*	02	02	Read a book *Nilisoma kitabu*	09	09	Read a leaflet or brochure *Nilisoma kipeperushi au broshua*	16	16
Seen a billboard – large poster on road side or side of building *Niliona tangazo – bango kubwa pembeni ya barabara au kwenye majengo*	03	03	Seen a film *Niliangalia sinema*	10	10	Browsed on the internet or received or sent an e-mail *Nilienda kwenye mtandao*	17	17
Seen a small poster on a wall *Niliona tangazo dogo kwenye kuta*	04	04	Been out with friends *Nilikuwa nje na marafiki*	11	11	Went to a restaurant or hotel for a meal *Nilienda kwenye baa*	18	18
Seen a wall painting on a shop or similar *Niliona picha ya ukutani kwenye duka au sehemu kama hiyo*	05	05	Attended a club meeting *Ulihudhuria mkutano wa klabuni*	12	12	Shopped at a supermarket (where you serve yourself) *Kununua katika supermarket(kujihudumia mwenyewe)*	19	19
Attended a social function / community meeting *Ulihudhuria katika shughuli za jamii*	06	06	Seen a live drama / play or puppet show *Umeona michezo ya kuigiza*	13	13	Shopped at an open market or from a hawker or small kiosk or shop *Nilinunua bidha kutoka kwa wauzaji wadogowadogo kwenye soko la wazi*	20	20
Read a newspaper *Soma gazeti*	07	07	Been to a health facility – center or doctor *kuenda kwenye kituo chochote cha afya*	14	14	None	99	99

If listened to radio in the past seven days ask

D3) Please tell me all the radio stations you have listened to in the past 7 days – even if for only a few minutes. Any other? ***Do not read out. Code answers mentioned as appropriate under relevant country.***

D4) Which ONE radio station have you listened to MOST in the past 7 days? ***Ask with regard to all stations mentioned at D3***

KENYA	**D3**	**D4**		**D3**	**D4**		**D3**	**D4**
East Africa FM	01	01	Inooro FM	13	13	Murembe FM	25	25
Baraka FM	02	02	Iqra FM	14	14	Musyi FM	26	26

Bibilia Husema FM	03	03	Jesus is Lord FM	15	15	Pulse FM	27	27
Capital FM	04	04	Kameme FM	16	16	Pwani Fm	28	28
Citizen FM	05	05	Kass FM	17	17	Radio Victoria FM	29	29
Classic FM	06	06	KBC – English Service	18	18	Radio Waumini FM	30	30
Coro FM	07	07	KBC – Kiswahili Service	19	19	Ramogi FM	31	31
Easy FM	08	08	KBC – Regional Service	20	20	Sayari FM	32	32
Nation FM	09	09	Kiss FM	21	21	Sheki FM	33	33
Family FM	10	10	Metro East FM	22	22	Simba FM	34	34
Hope FM	11	11	Metro FM	23	23	Y-FM	35	35
Sound Asia FM	12	12	VOA	24	24			
TANZANIA	**D3**	**D4**		**D3**	**D4**		**D3**	**D4**
East Africa FM	01	01	Radio Free Africa	12	12	Radio Ukweli	23	23
City FM	02	02	Radio Koran	13	13	Radio 5- Arusha	24	24
City Radio	03	03	Radio Milimani	14	14	RI Channel 2(BBC)	25	25
Clouds FM	04	04	Radio One	15	15	RTD External service	26	26
Country Radio	05	05	Radio TZ	16	16	Saui ya imani	27	27
Feba Radio	06	06	Radio Mwangaza	17	17	Sauti ya injili	28	28
Kiss FM	07	07	Radio station 1	18	18	Times FM	29	29
Magic FM	08	08	Radio Tumaini	19	19	Upendo FM	30	30
Praise radio	09	09	Radio Tanzania (RTD)	20	20	Wapo Radio	31	31
PRT	10	10	Radio Uhuru	21	21	Zanzibar Radio	32	32
Radio Abood	11	11	Radio Maria	22	22			
UGANDA	**D3**	**D4**		**D3**	**D4**		**D3**	**D4**
East Africa FM	01	01	Dembe FM	21	21	Mama FM	41	41
Akaboozi (Radio 2)	02	02	Dunanis FM	22	22	Mbale FM	42	42
Alpha FM	03	03	Endigito FM	23	23	Nile Broadcasting Service	43	43
Arua One	04	04	Family FM	24	24	Open Gate Radio	44	44
BBC	05	05	Hoima FM	25	25	Power FM	45	45
Beat FM	06	06	Impact Radio	26	26	Prime Radio	46	46
Busoga FM	07	07	Kagadi Radio	27	27	Radio Apac	47	47
Capital FM	08	08	Kamwenu-wenu	28	28	Radio Buddu	48	48
CBS One	09	09	KFM	29	29	Radio Equator	49	49
CBS Two	10	10	Kiira FM	30	30	Radio Maria (Radio 1)	50	50
Colour FM	11	11	Koboko FM	31	31	Radio Paidha	51	51
Radio Pisces	12	12	Rhino FM	32	32	Ventus FM	52	52
Radio Sapiensa	13	13	Rock FM	33	33	Voice of Africa	53	53
Radio Simba	14	14	Sanyu FM	34	34	Voice of Kigezi	54	54
Radio Uganda AM/SW	15	15	Skynet FM	35	35	Voice of Life	55	55
Radio Uganda Green Channel	16	16	Spirit Radio	36	36	Voice of Teso	56	56
Radio Unity	17	17	Star Radio	37	37	Voice of Toro	57	57
Radio Wa	18	18	Super FM	38	38	Word of Life	58	58
Radio West	19	19	Top Radio	39	39			
Radio France (RFI)	20	20	Touch Fm	40	40			

If watched TV in the past seven days ask

D5) Please tell me all the TV stations you have watched in the past 7 days – even if for only a few minutes. Any other? ***Do not read out. Code answers mentioned as appropriate under relevant country.***

D6) Which ONE TV station have you watched MOST in the past 7 days? ***Ask with regard to all stations mentioned at D5***

KENYA	**D5**	**D6**		**D5**	**D6**		**D5**	**D6**
Citizen TV	01	01	Metro TV	05	05	KBC	08	08
East Africa TV	02	02	NTV	06	06	KTN	09	09
Family TV	03	03	Sayari	07	07	STV	10	10
DSTV	04	04						
TANZANIA	**D5**	**D6**		**D5**	**D6**		**D5**	**D6**
Abood TV	01	01	CTN	07	07	TV Burudani-Arusha	13	13
Agape Television Network (ATN)	02	02	East Africa News Network	08	08	TV Zanzibar	14	14

C2C	03	03	EAST Africa TV (EATV)	09	09	TVT	15	15
CEN	04	04	ITV	10	10	DSTV/Super sport	16	16
Channel Ten	05	05	Star TV	11	11			
1130	06	06	SUA TV- Morogoro	12	12			
UGANDA	**D5**	**D6**		**D5**	**D6**		**D5**	**D6**
DSTV	01	01	UTV	04	04	STV	07	07
East Africa TV	02	02	WBS	05	05	Top TV	08	08
Pulse Africa	03	03	LTV	06	06			

If read a newspaper or magazine in the past seven days ask

D7) Please tell me the newspapers you have read in the past 7 days – even if for only a few minutes. Any other? ***Do not read out. Code answers mentioned as appropriate under relevant country.***

D8) Which ONE newspaper have you read MOST in the past 7 days? ***Ask with regard to all stations mentioned at D7***

KENYA	**D7**	**D8**		**D7**	**D8**		**D7**	**D8**
Daily Nation	01	01	Kenya Times	04	04	The East African	07	07
People Daily	02	02	The Standard	05	05	The Citizen	08	08
Taifa Leo	03	03	The Monitor	06	06	New Vision	09	09
TANZANIA	**D7**	**D8**		**D7**	**D8**		**D7**	**D8**
Aonur	01	01	Kiu	14	14	Sunday News	27	27
Alasiri	02	02	Komesha	15	15	Sunday Observer	28	28
Al-Huda	03	03	Lete Raha	16	16	Taifa Leo	29	29
Business Times	04	04	Msanii	17	17	The African	30	30
Champion	05	05	Msema kweli	18	18	The East African	31	31
Daily News	06	06	Mtanzania	19	19	The Express	32	32
Dar Leo	07	07	Mwananchi	20	20	Majira	33	33
Dimba	08	08	Mwanaspoti	21	21	The Guardian	34	34
Financial times	09	09	Mzalendo	22	22	Times	35	35
Hako	10	10	Nipashe	23	23	Uhuru	36	36
Ijumaa	11	11	Nyakati	24	24	Uwazi	37	37
Kasheshe	12	12	Rai	25	25	Wasaa	38	38
Kiongozi	13	13	Sanifu	26	26	Yanga	39	39
UGANDA	**D7**	**D8**		**D7**	**D8**		**D7**	**D8**
Bukkedde	01	01	New Vision			Daily Nation		
The Monitor	02	02	Red Pepper			The Standard		
The East African	03	03						

E. DEMOGRAPHICS

E1) Are you the head of this household?

Yes	1	No	2

E2) What is the highest level of education you have completed? *Je, kiwango cha masomo yako ni kipi*?

<u>If respondent is not the head of the household at E1 then ask:</u>
E3) What is the highest level of education the head of your household has achieved? *Je, kiwango cha masomo yako ni kipi*?

	E2	E3		E2	E3
No formal schooling	00	00	Post-secondary qualifications, other than university e.g. a diploma from a polytechnic or college	06	06
Informal schooling only (including Koranic schooling)	01	01	Some university	07	07
Some primary schooling	02	02	University completed	08	08
Primary school completed	03	03	Post-graduate	09	09
Some secondary school / high school	04	04	Don't know **[DO NOT READ]**	99	99

Secondary school / high school completed	05	05			

E4 Which of the following age-groups do you fall in to? ***Show card*** *Katika vikundi vya umri vifwatavyo, je uko kikundi kipi?*

18-24	1	45 – 55	4
25-34	2	56 +	5
35-44	3	Don't know **[DO NOT READ]**	9

E5) What is your occupation, if any? *Unafanya kazi gani kama unayo?* ***Write exact occupation below***

____

ASK IF RESPONDENT IS NOT HEAD OF HOUSEHOLD
ULIZA KAMA ANAYEJIBU SIYE KICHWA CHA BOMA
E6) What is the occupation of the head of this household? *Mwenye boma hili hufanya kazi gani?* ***Write exact occupation below***

____

Now Interviewer code below

	(E5) Respondent *Anayejibu*	(E6) Head of hhold *Mwenye nyumba*
NOT WORKING HAFANYI KAZI		
Unemployed *Hajaajiriwa*	01	01
Student / pupil *mwanafunzi*	02	02
Retired *Amestaafu*	03	03
Housewife *Mke wa nyumbani*	04	04
WORKING ANAFANYA KAZI		
Own business – small – no full time employees *Ana biashara yake – ndogo - kibarua*	05	05
Own business – medium – up to 10 employees *Ana biashara yake – kiasi tu – wafanyi kazi 10*	06	06
Own business – large – over 10 employees *Ana biashara yake – kubwa – zaidi ya wafanya kazi 10*	07	07
Working for a private company *Anafanyia kazi kampuni ya kibinafsi*	08	08
Working for government / parastatal *Anafanyia kazi serikali/idara moja*	09	09
Working for non-governmental organization *Anafanyia shirika lisilo la serikali*	10	10
Other **WRITE IN** ***Zingine ANDIKA HAPA***	11	11
Don't know [DO NOT READ] *Sijui (USISOME)*	99	99
Refused [DO NOT READ] Kataa (USISOME)	89	89

E7) Fill in Socio-economic class of respondent based on occupation of head of household

AB	1	D	4
C1	2	E	5
C2	3		

E8) What is the average monthly income of your family? ***Show card*** *Je kwa kadiri, mapato ya jamaa yako ni ngapi?*

KENYA (Kshs)					
Less than 5,000	01	40,001 – 50,000	06	90,001 – 100,000	11
5,001 – 10,000	02	50,001 – 60,000	07	Over 100,000	12
10,001 – 20,000	03	60,001 – 70,000	08	Refused	13
20,001 – 30,000	04	70,001 – 80,000	09	Don't know	99

30,001 – 40,000	05	80,001 – 90,000	10		
UGANDA (Ushs)					
Less than 125,000	01	1,000,001 – 1,250,000	06	2,250,001 – 2,500,000	11
125,001 – 250,000	02	1,250,001 – 1,500,000	07	Over 2,500,000	12
250,001 – 500,000	03	1,500,001 – 1,750,000	08	Refused	13
500,001 – 750,000	04	1,750,001 – 2,000,000	09	Don't know	99
750,001 – 1,000,000	05	2,000,001 – 2,250,000	10		
TANZANIA (Tshs)					
Less than 75,000	01	600,001 – 750,000	06	1,350,001 – 1,500,000	11
75,001 – 150,000	02	750,001 – 900,000	07	Over 1,500,000	12
150,001 – 300,000	03	900,001 – 1,050,000	08	Refused	13
300,001 – 450,000	04	1,050,001 – 1,200,000	09	Don't know	99
450,001 – 600,000	05	1,200,001 – 1,350,000	10		

THANK RESPONDENT & CLOSE INTERVIEW

Annex 7.2 Survey Instruments (Key Informant Screener)

PROJECT:	**Key Informant Screener**

NAME: (BLOCK CAPITALS, inc. initials)

Country: KENYA

TANZANIA

UGANDA

BUSINESS ADDRESS: ---

POSTCODE: ---

Telephone No.: | | | | | | | | | | | | | | |

Q1. Have you ever heard of the term "organic food products"?

Yes	1	CONTINUE
No	2	CLOSE

Q2. To what extent would you say you are involved in making decisions on the types of food products that this business stocks / sells? **READ OUT**

To a great extent	1	**CONTINUE**
To a good / significant extent	2	
To a small / minimal extent	3	**GO TO Q.5**
Not at all	4	

Q3. What types of food products or foods does this business stock / sell? **READ OUT**

Organic	1	**CONTINUE**
Non-organic	2	
Both	3	
Don't know	4	**GO TO Q.5**

Q4 To what extent would you say you are involved in the day to day management of the business in as far as customer relations are concerned? **READ OUT**

To a great extent	1	**RECRUIT AS PER INSTRUCTIONS BELOW**
To a good / significant extent	2	
To a small / minimal extent	3	**CLOSE**
Not at all	4	

Q.5. Who would be the person in this business who is significantly involved in decision-making on food types to stock or sell as well as day to day customer relations? **WRITE IN NAME & POSITION OF PERSON BELOW THEN FIND THEM AND FILL OUT A NEW SCREENER QUESTIONAIRRE TO CERTIFY THAT THEY ARE THE APPROPRIATE RESPONDENT**

NAME	POSITION

Thank and close

Recruitment instruction:

Hotel representatives: 6 per country **Supermarkets:** 4 per country
Restaurant representatives: 6 per country **Greengrocers:** 4 per country

Appointment date: -- Time: --

Location: -- --

7.3 Annex 3 Discussion Guide

ORGANIC SURVEY

Key Informant Interview Guide with Hotels, Restaurants, Supermarkets and Greengrocers

Greetings and introductions, explanation of purpose of the research:
- To better understand current perceptions and attitudes towards organic products

1. Background and business issues (with consumers on food products)   (5 minutes)

- What are the three most **common** issues you encounter in your business as relating to consumers / customers preferences of food products?
  - → How easy / difficult it is to accommodate these preferences
  - → If you are to rank these preferences starting with the most common, how would you do it?

- What are the three most common issues you take into consideration when stocking up /

- How would you rank them starting with the most common?

2. Attitudes towards organic foods   (15 minutes)

- Now concentrating on types of foods, what are your views on organic foods?
  - → Why?

- What types of foods do you buy / sell? Organic or non-organic? Why? Is this a deliberate decision to buy / sell this type of food / products? Why?

  Probe on:
  - → Customer preferences
  - → Quality
  - → Cost

- What level of priority do you place on buying and selling organic products / foods? What level of priority do you place on buying and selling of non-organic products / foods?
    - → Explore reasons /benefits or organic vs. non-organic

- How do you ensure that what you buy and sell is organic? Please explain.

- How satisfied are you with organic foods / products in terms of availability? What of cost? Quality? Why?

- What would motivate you to buy and sell organic foods / products or more of them?
    - → Explore motivations fully

why not?

- What challenges do you face (or would restrain you) when buying/selling organic foods? Please explain

3. Consumer awareness building and education on organic products (10 minutes)

- What in your opinion are the key issues that consumers need to be educated about on organic products? Why do you say so?

- How best do you think this knowledge can be imparted?
  Probe:
    - → Formats (field days, farmers markets)
    - → Types of media
    - → Message bearers
    - → Stakeholders / participants

- Have you as a business played any role currently and / or in the past on building awareness surrounding organic food products? Why / why not?
  - → If yes probe how and whether felt it was worthwhile and would like to continue doing so
  - → If no probe whether would like to be involved in future.

4. Questions on verification system (10 min)

- How do your customers identify organic products that they are buying from you? Probe:
  - → Arranged on one shelf or a corner?
  - → Have a logo?
  - → Are labelled?
  - → Ask for your guidance or assistance?
  - → Other?

- Are your customers comfortable with that? Do they ask any questions regarding the source, and the organic integrity of the products?

- Are you aware of the available standards of organic products? **If so**, can you please describe them to me?

- Do you have any suppliers who have certification on these standards?

5. Other (2 minutes)

- Do you have any other suggestions or comments that you would like to share as regards organic food products?

Thank and close

7.4 Annex 4: PR Questionnaire

Organic Farming / Products Promotional Material

1. Please list all the educational / promotional material on organic farming / products that your organization has developed / used / come across in the last two years or so (PR materials include posters, brochures,
TV spots, radio advertisements, car stickers etc)
2. For each material listed please provide a brief description including message being relayed by each

	MATERIAL	DESCRIPTION & MESSAGE
1		
2		
3		
4		
5		
6		
7		
8		
9		

3. Out of all these materials, please state in your opinion and from experience, which three have been most successful in order from most successful and give reasons why. Also state which ones have been least successful in order from least successful and give reasons why.

	MOST SUCCESSFUL	REASONS
1		
2		
3		
	LEAST SUCCESSFUL	REASONS
1		
2		
3		

4. Please provide any other useful insights / comments / suggestions as you deem fit for future development of promotional and educational material based on the materials you have currently

THANK YOU

7.5 Annex 5: Instruction Manual for Field Surveyors

INSTRUCTION MANUAL FOR FIELD SURVEYORS

September, 2006

September 2006

This publication was prepared and implemented under the Organic Attitudes and Perceptions Survey for IFOAM

TABLE OF CONTENTS

1. INTRODUCTION

1.1 Project Information

In the frame of the project with the objective to improve income and livelihood of rural communities in East Africa through facilitation of trade in organic products by means of a regional standard and certification cooperation, there is a plan to develop and implement a concept for "consumer education and awareness building". The rationality is based on the fact that a standard has no value if it is not known, and regional trade of organic products can only emerge if there is knowledge about the standards and the production.
The overall objective of the project thus is to increase consumers understanding of Organic Agriculture and to inform consumers in East Africa about the new standard in the Region including the importance of Standards.
Specific objectives include:

- Identify consumers' attitudes towards organic products and different verification systems in East Africa
- Screen existing consumer awareness materials in East Africa
- Produce recommendations for consumer awareness activities to be carried out in 2007.

1.2 THE PURPOSE OF THIS MANUAL

This manual will serve as a reference for surveyors while they are in the field interviewing respondents. It is important that data be collected as carefully and completely as possible. Information collected on the questionnaires will be coded and entered into a database where it will be analyzed to summarize findings from the survey. Carefully collected and reported information is critical to avoiding biases and errors in the later data tabulation and analysis.

If surveyors have any questions at all about the information in this manual or instructions on the questionnaire, they should consult their supervisors before proceeding with any further interviews.

1.3 APPRoaCH TO THIS TRAINING

- Behaviours:
  - Listen
  - Join in
  - Speak up and share ideas
  - Ask questions – as many as possible; you are probably asking for everyone else

- Attitudes:
  - Question and challenge us
  - Bring up any problems or potential problems now – not later!
  - Have fun
  - Help each other

1.4 RESPONSIBILITIES OF FIELD SURVEY SUPERVISORS

If you are a <u>field survey supervisor</u> you will:

1. Read and become fully familiar with this survey manual and with the survey questionnaire to be used to collect information from respondents in your geographic area.

2. Participate in and direct the process of selecting respondents to be interviewed

3. Organize and direct the work of the survey teams in one of six towns – either Nairobi, Mombasa, Dar es Salaam, Zanzibar, Kampala or Jinja; draw up the interviewer and supervision itinerary for your area

4. Allocate activities each morning – a half hour meeting should take place before the start of each day

5. Manage funds required during fieldwork days

6. Accompany field survey enumerators when they are conducting interviews

    a. To assess interviewing and interpersonal relationships quality.
    b. Feedback to the entire team on errors / problems and solutions.

7. Review completed questionnaires at the end of each day of fieldwork to assure they have been filled in correctly and accurately and work with field survey enumerators to correct any errors found in recording responses. Be on hand each evening to solve queries

8. Send interviewers back to repeat sections / or personally back-check those that seem to have problems.

9. Code and inventory all questionnaires and send the questionnaires to Nairobi for coding and data entry.

If you are a field survey enumerator you will:

1. Read and become fully familiar with this survey manual and with the survey questionnaire to be used to collect information from respondents in your geographic area.

2. Take your own detailed notes about each question in the questionnaire during training

3. Follow instructions from your field survey supervisor in selecting respondents to be interviewed.

4. Conduct survey interviews at the respondent's house but in a location that will allow the respondent to give answers in privacy.

5. Set up a good relationship with the respondent

6. Conduct 5 -6 interviews per day

7. Interview using all the relevant questions AS THEY ARE WRITTEN

8. Read and understand the questionnaire completely in order to be able to assist the respondent where they are not clear

9. Write down verbatim answers as spoken WORD FOR WORD

10. Probe properly for all the information under verbatim answers

11. Consult your supervisor when you have any questions or concerns about the questionnaire or about methods of selecting respondents or collecting information.

12. Complete answers to all questions and make any corrections or additions as directed by your supervisor.

1.5 daily fieldwork schedule

- 7.30 am Meet with team leader
  - Go through problems with yesterdays questionnaires with the whole team – not just those who made the errors
  - Answer any questions / forward questions on to team leader
  - Receive allocations and location of today's interviews
  - Receive and sign for transport money for today
- 8.00 am Leave for field
  - Travel in teams of 1 / 2 / 3 /4 / 5 depending on the sample locations
- 5.30 pm Leave field for base
  - But not if halfway through an interview!
- 6.00 pm Rest
  - Team leaders continue to work until all the questionnaires are checked and any issues are highlighted and summarized for the following morning's meeting

2. SELECTING AND LOCATING RESPONDENTS

2.1 OVERVIEW

The survey will collect data from final consumers, representatives of hotels, restaurants, greengrocers and supermarkets of the selected towns. The major sections of the questionnaire cover awareness and understanding of organic products and their benefits, perceptions and attitudes towards organic products, post-test of existing awareness materials, media usage and demographics.
The primary aim of the survey is to collect quantitative data that will be entered into a database that will be subjected to statistical analysis focused on the consumers' satisfaction. However, a smaller qualitative sample will be conducted with the key informants namely hotels, restaurants, greengrocers and supermarkets.

2.2 SAMPLING

Sample Selection Procedure

The procedure for sample selection will be to distribute the sample across identified towns in proportion to population size. Random sampling of smaller administrative units with PPS, and subsequent distribution of sampling points would follow this.

Starting points will be located randomly by identifying at least 3 landmarks and drawing one out of a hat after which a random procedure will be used to determine direction, and then the interviewer will proceed on a random walk following the left hand rule. Interviews will be conducted at every 3rd household on the left hand-side until the prescribed sample for the given sampling unit (SP) is achieved. After a successful interview, 2 households will be skipped.

Respondent selection procedure

At the selected household, the interviewer will apply the alphabetical order of names technique to ascertain which respondent is to be interviewed. In this method, all members of a selected household are listed on the questionnaire using their first names and numbers are then assigned to each name in order of the alphabet. The selected respondent will be the one whose name has been assigned the number one. Up to three visits should be made to the household to try to interview the chosen respondent.

Closed-door methodology

This occurs when interviewers find a household locked up. If the interview finds a closed door, he or she tries to find a household member in the surrounding area. If no one is available he or she adds that on to the end of the number of households he or she has to visit on his random route.

Substitution methodology

Substitution is only permitted after the interviewer has attempted three times to contact the selected respondent, over a 2-day period. This is very important because if we do not find the selected respondent and substitute for someone else who happens to be around, this will bias the sample towards those who are at home. When the interviewer has randomly selected the respondent, he will then immediately include on the questionnaire the age, the gender and education status of the selected respondent. Then if, after the 3rd call back, the selected respondent is not located, the interviewer may continue the random route, and then once completed, search for a substitute for the kind of respondent he missed. The substituted respondent will be a match, as far as possible, by gender, age group and education status. For example, an interviewer starts at her starting point at house No 1. She does the random selection of respondent and is able to interview the respondent who happens to be at home. She then skips 2 houses and does another successful interview at house no 2. She skips another 2, but at house no 3 after applying the random selection of respondent she does not get the respondent. She arranges to call back later on in the day, and the following day, but still does not get that respondent. She notes that a substitution is to be made. At house numbers 4, 5, 6 she finds closed doors. She does successful interviews within the 2-day fieldwork period at houses 7, 8, 9. She does not find the respondent selected at house no 10, and so this is another substitution, and then she completes successful interviews at 11. She has then completed 6 successful interviews. She then tries to re-do interviews for house number 3 and 10 by using the respondent demographics of age, gender and education status as a "quota" to look for two similar respondents.

Refusal methodology.

In the case of a refusal, the respondent who refused is not substituted in any way, but the random selection continues at the next eligible household (after skipping 2 households), until the total for that SP is reached.

3. ADMINISTERING the instruments

3.1 Key informant screener questionnaire

This will be administered to potential key informants as will be decided upon by the team leaders. The questionnaire should be followed to the letter so as to determine the suitability of the respondent. The objective is therefore to select a suitable respondent and to obtain an appointment for the interview. If willing, the respondent may be interviewed on successful completion of the screener. This will save project time and resources as it will avoid making another trip there on another day.

3.2 Key informant discussion guide

This will be administered to representatives of hotels, restaurants, supermarkets and greengrocers who qualify after being screened. It is simply a guide and not a structured questionnaire that must be followed word for word. Instead ensure you cover the areas listed, and MOST IMPORTANTLY, pay attention to the discussion so as to be able to probe for more interesting details and overall steer the discussion in the direction it is meant to go so as to achieve the stated objectives. Take clear notes and responses to each question – write the responses given underneath the relevant question. Take time after the interview to rewrite the responses on a clean discussion guide in detail, and legibly as you may have had to rush or use shorthand during the interview so as to speed up the discussion.

3.3 consumer questionnaire

This will be administered to the public (consumers) selected through a random procedure at the household level. Ensure you have read the questionnaire fully and understood it. Follow the interviewer instructions provided in the questionnaire in bold typeface carefully. The questionnaire should be administered word for word.

3.3.1 Determining socio-economic class

After establishing the occupation of the head of household, use the following categories of occupations to determine their SEC.

A. AB CLASS

(Senior Professionals/ Managers)

- Senior Government Officers

Ministers /Permanent, Deputy, Under Secretaries/MP's, Senior Local Government Officers, Mayors
Principal Assessors (tax, insurance)
Provincial / District Heads and Deputy Heads (all branches)

Chief Inspectors/Superintendents (Police, Prisons, Schools, Health etc

- Senior Staff of Companies/Corporations, Proprietors of big businesses

Chairmen/Directors
Company Secretaries
Senior Managers (of at least 15 people)/Senior Executives
Senior Buyers
Regional/District Sales Managers (Graduates)
Senior Secretaries/Personal Assistants/Aides

- Agricultural

Proprietors of large farms
Managers of large farms

- Teaching

University/College Professors/Senior Lecturers
Bursars
Secondary School Heads/Graduate teachers/Tutors

- Other Professionals

Doctors/Dentists
Pharmacists/Physiotherapists/Radiographers
Hospital Matrons/Senior Sisters
Judges/Magistrates/Advocates/Lawyers
Architects/Senior Surveyors
Armed Forces- Majors, Squadron Leaders, Lieutenants
Commanders and upwards
Aircraft Pilots/Ship Captains
Senior Scientists (Chemists, Botanists, e.t.c)
Senior Qualified Engineers
Economists
Bishops/Cardinals
Computer Systems Analysts/Senior Programmers
Senior Qualified Chefs.

B. C1 CLASS
(Junior Middle Managers Professionals)

- Government Officers

County/City/Town Councillors
Junior Assessors (tax, insurance)
District Officers ii-iii
Land Adjudicators
Customs Officers
Inspectors(Police, Prisons, Schools, Health e.t.c)
Welfare Officers
Estate /Housing Officers
Junior Librarians

- Companies/Corporations Employees

Proprietors of medium-sized businesses

Managers (of less than 15 people)
Junior/Middle managers
Junior Executives
Senior Supervisors/Foremen
Senior Clerks
Cashiers/Bank Tellers
Salesmen/Representatives
Secretaries

- Agricultural

Proprietors of middle-sized farms
Managers of medium-sized farms

- Other Professional

Medical Assistants
Nurses
Reporters/Journalists
Laboratory Technicians
Professional Photographers
Announcers
Junior Computer Programmers
Church Ministers
Armed Forces Officers below Major, Squadron Leader, Lieutenant

C. C2 CLASS

- (Unqualified Traders/Professions, Skilled Manuals)

Skilled manual workers
Chiefs/Sub-chiefs
Teachers (P2.P3) and untrained (Education Level: Completed at least form IV
Receptionists
Copy-typists
Junior Clerks
Unqualified nurses/dressers
Meter-readers
Sergeant/Corporals(Police, Prisons, Armed Forces)
(Mechanics/Carpenters/Electricians/Drivers, e.t.c.)
Bus conductors/Train Guards
Cooks (Middle Grade, Trainees/Learners, 2nd Class hotels, e.t.c)
Bar-men
Proprietors of small farms
Manyapara (Junior Supervisors)
Church Elders/Quran Teachers

D. D-CLASS

- (Semi-skilled i.e. some training)

Cooks/House servants/Maids/Ayahs
Waiters/Stewards
Petrol Station Attendants
Shop Assistants
Untrained Teachers (Education Level below form IV)
Tin-Smiths
Shutters/Points men
Painters
Cobblers
Forestry workers
Game scouts
Fishermen – for own account
Kiosk owner
Owner of small plot selling produce
Fire Fighters
Packers
Cargo Handlers
Dhobis
Butchers

E. E-CLASS

- (Unskilled: May own a small plot but sells none or very little produce)

Labourers
Part time/Casual, Unskilled Workers
Watchmen/Askaris
Messengers
Turnboys/loaders
Sweepers/Cleaners
Waiters in Small Kiosks
Herdsmen/Milkers
Coffee/Tea pluckers
Slaughterhouse attendants/Meat cutters (Low-class Butcheries)
Fishermen

4. INTERVIEWING RESPONDENTS

4.1 PREPARING FOR THE INTERVIEW

Dress — When interviewing, it is important to look professional at all times. Your dress should be appropriate and comfortable. Do not necessarily wear your best clothes, or clothes that would make you stand out (such as a business suit). Do not wear expensive jewelry that may make you appear to be much richer than the people that you are interviewing. Such considerations are important, and have been found to influence how comfortable people feel about being interviewed.

Supplies required—Before leaving for the field, check to make sure you have adequate supplies for the day's work. These supplies include:

1. A sufficient supply of questionnaires (bring extras)
2. This Field Survey Interviewer's Manual
3. Identification documents
4. Information sheets on the survey study
5. A clipboard
6. Blue ballpoint pens
7. A briefcase or bag to carry the questionnaires
8. Any personal items you will need to be comfortable

Finding a Good Interview Location—Try to conduct the interview in a location that is private and where there are not many distractions. This could be a room in the house or outside at some other location. It is important that the respondent is listening carefully during the interview.

4.2 CONDUCTING THE INTERVIEW

4.2.1 AT THE BEGINNING OF THE INTERVIEW

Remember to build rapport with respondents. At the beginning of an interview, you and the respondent are strangers to each other. The respondent's first impression of you will influence his/her willingness to cooperate with the survey. Be sure that your manner is always friendly.

1. Make a good first impression—When first approaching the respondent, do your best to make him or her feel at ease. Open the interview with a smile and greeting such as "Good Afternoon" and then proceed with introducing yourself and the purpose of your visit.

2. Always have a positive approach—Never adopt an apologetic manner, and do not use words such as "Are you too busy?", "Would you spare a few minutes?" or "Would you mind answering some questions?" Such questions invite refusal before you start.

3. Stress confidentiality of responses when necessary—If the respondent is hesitant about responding to the interview or asks what the data will be used for, explain that the information you collect will remain confidential, no individual names will be used for any purpose, and that all information will be grouped together to write a report. Never mention other interviews or show completed questionnaires to other interviewers or supervisors in front of a respondent or any other person. Request honesty and openness.

4. Give the respondent the opportunity to ask questions before continuing with the interview—Before agreeing to be interviewed, the respondent may ask you some questions about the survey or how she was selected to be interviewed. Be direct and pleasant when you answer. Answer any questions from the respondent frankly.

5. Explain that the purpose of the survey and research—is to better understand the experiences and views of consumers of food products, and that the questions will be related to their own experiences and views.

6. Indicate that the interview should take no more than half an hour—ask if the respondent has available that much time. If not indicate your willingness to return at another time if it is inconvenient for her to answer questions then.

7. Before starting the actual interview make sure you have already filled in the following information—
   - Interviewer name;
   - Date, time start interview;
   - Location of interview; and
   - How respondent was selected

8. Be neutral throughout the interview—Most people are polite and will tend to give answers that they think you want to hear. It is therefore very important that you remain absolutely neutral as you ask the questions. Never, either by the expression on your face or by the tone of your voice, allow the respondent to think that he has given the "right" or "wrong" answer to the question. Never appear to approve or disapprove of any of the respondent's replies.

9. If the respondent gives an ambiguous answer—try to probe in a neutral way, asking questions such as:
   - “Can you explain a little more?”
   - “I did not quite hear you, could you please tell me again?”
   - “There is no hurry. Take a moment to think about it.”

10. Never suggest answers to the respondent—If a respondent's answer is not relevant to a question, do not prompt him by saying something like "I suppose you mean that..... Is that right?" Rather, you should probe in such a manner that the respondent himself comes up with the relevant answer.

11. Do not change the wording or sequence of questions—The wording of the questions and their sequence in the questionnaire were carefully chosen for a reason. If the respondent has misunderstood the question, you should repeat the question slowly and clearly. If he still does not understand, you may reword the question, being careful not to alter the meaning of the original question. Provide only the minimum information required to obtain an appropriate response.

12. Handle hesitant respondents tactfully—If the respondent is reluctant or unwilling to answer a question, try to overcome his or her reluctance by explaining that the same question is being asked of citizens all over the 3 cites and that the answers will all be merged together. If he still refuses, simply write REFUSED next to the question and proceed as if nothing had happened. If you have successfully completed the interview, you may try to obtain the missing information at the end but the respondent should not be forced to give an answer.

13. Do not make assumptions—You should also be careful not to jump to conclusions based on previous information. Do not assume the answer to any question based on your previous experience with ‘the way people behave or think.’

14. Do not skip questions—Do not skip a question even when you think the answer if obvious. Some of the questions are purposefully overlapping in order to check for consistency in answering.

15. Do not hurry the interview—Ask the questions slowly to ensure the respondent understands what he is being asked. After you have asked a question, pause and give him time to think. If the respondent feels hurried or is not allowed to formulate his own opinion he may respond with "I don't know" or give an inaccurate answer. If you feel the respondent is answering without thinking, just to speed up the interview, say to the respondent, "There is no hurry. Your opinion is very important so consider your answers carefully."

16. Do not show the questionnaire to anyone, including the respondent—You must not show the questionnaire to anyone, unless otherwise told to by your supervisor or field-editor. For example, sometimes a respondent may want to complete the questionnaire himself, or to read a question himself. It is important that you do not show the document to him. If respondent does request this, be polite but firm about your refusal.

17. If you are ever unsure, write out all of the respondent's reply on the questionnaire—Anything out of the ordinary can also be noted on the front page in the comments box or in the margins directly on the survey.

18. Use "Show Cards"—Use a show card for relevant questions so as to give the respondent something visual and concrete to help him/her answer. Be clear in indicating out loud and by pointing to which ends of the scale correspond to which statements. If the respondent points to a number, repeat the answer verbally in order to confirm what he/she meant. Also use a show card for sensitive information such as education and income. In this case, do not repeat the answer verbally, but rather point to confirm the respondent's answer.

19. Write legibly—It is important that those who will be entering the data from your survey can decipher what you have marked. Checks should be clearly within one box and not another. If you are circling an item, be sure not to circle other items nearby.

4.2.2 AT CONCLUSION OF THE INTERVIEW

Say that the interview is now over and thank the respondent for their participation.