A Consumer Survey of Attitudes and Preferences Towards Organic Foods

Kenya, Uganda, Tanzania.

International Federation of Organic Agriculture Movements (IFOAM)

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Aim of the survey

- To identify consumers' attitudes towards Organic products,
- To collect PR materials
- To produce recommendations for consumer awareness activities in East Africa.

Key research objectives

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

Research methodology and process

- Technique: quantitative and qualitative methodologies.
- Quantitative: numbers
- Qualitative: Values, Attitudes and preferences.

Quantitative

- Sample target of 600 consumer interviews.
- 200 interviews in each country.
- 200 interviews distributed between two towns: capital and one other town; tourist areas.
- Distribution of interviews done randomly according to PPS (Probability proportion to size) down to SPs(Sample points) within each town.

Qualitative survey

- Done amongst key informants in each of the 6 towns.
- 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.

Survey instruments

- Structured questionnaires with both closed and open ended questions.
- A short questionnaire with open ended questions regarding the usage of PR materials
- A discussion guide which was administered to key informants
- A recruitment questionnaire to help establish suitable respondents who would fit the profile of key informants thus qualify to be interviewed for the survey.
- The 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.

Quantitative Survey Findings

- **Awareness of organic food products among consumers and their understanding of the term organic foods:**
- 38% don't know or not sure what it means
- 26% Natural foods
- 17% Foods without chemicals
- 9 % Foods not sprayed with pesticides
- 8% Traditional or indigenous foods
- 6% Foods grown with manure
- 3% Herbal foods
- 3% Healthy nutritious foods.

Awareness per country

- 87% of Ugandans,
- 56% of Kenyans
- 43% of Tanzanians.

Awareness per Age

- **Don't know**
- 18-24 49%.
- 25-34 37%
- 35-44 31%
- 45-55 42
- 56 and above . 28

Awareness By Social/Economic Status

- **Don't Know**
- E 58
- C2D 47.5
- ABC1 25

Awareness by Sex

- Don't Know
- Males 39%
- Females 37%

Source of Information of what organic foods are

- Word of Mouth
- Taught in school or college
- Television programmes/adverts
- Radio Programmes/adverts
- Books
- Newspaper/Magazines
- Promotional events

Consumer Awareness of some ‘facts’ About Organic Food

- While 56% of the population know that organic products should be certified,
  - 69% don’t know that organic products can be identified by a logo.
  - 80% don’t know that there is a national organic movement in either Kenya, Uganda or Tanzania
  - 83% don’t know that there is a certification body in Kenya Uganda and Tanzania
  - 69% don’t know that there are local standards for organic products.

Awareness of presence of Specific organic Products

- Of the 48%of people who have ever heard of Tanika Coffee (Tanzania), only 20 % are aware it is organic.
- Of the 44% people who have heard of “Out of Africa Coffee” (Kenya), a mere 9% are aware it is organic.
- Of the 9% people who have heaard of Tefu dried fruits (Uganda) only 4.5% were aware it is organic.

Organic Products Consumed or considered for consumption

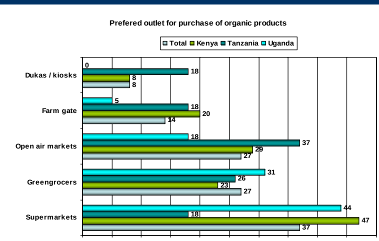
- Organic fruits and Vegetables (85%)
- Organic Cereals (35)%
- Organic Daily Products (16%)
- Organic Meat (14%)
- Organic Bread and Pasta (8%)

Reasons for not consuming or considering consuming organic food

No Specific Reason 79%

- 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%

Preferred outlet for Purchase of Organic Products



Do you trust the verification method mentioned?

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%

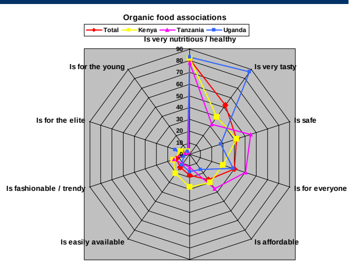
Need for Verification

- 69% Yes
- 31% No

Who should be responsible for providing this verification

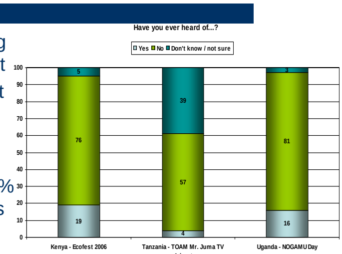
- 51% prefer the Government
- 19% an Independent certification Body
- 18% NGO's

Key associations of the Organic Food Concept Among the Respondents



Awareness of promotional events

- Ecofest -10% taking care of environment
- Mr. Juma TV advert 38% could not remember the message
- NOGAMU Day 6% preserving products through solar.



Qualitative Survey Findings

Restaurants, Hotels, green grocers and supermarkets.

Issues Taken Into Consideration when Stocking Organic Food

- Quality
- Demand
- Availability / supply side issues
- Price
- Variety

Attitudes towards Organic Foods

- Now concentrating on types of foods, what are your views on organic foods?
  - Very healthy, nutritious, natural, and free from chemical residues
  - High quality and tastier as compared to non-organic.
  - Consumption of organic products is an emerging world trend.
  - Organic foods present very attractive benefits of consumption, but are significantly expensive than non-organic.

What types of foods do you buy / sell? Organic or non-organic? Why?

- More non Organic. Reason;
  - Very limited and unreliable supply of organic products
  - Most people do not know much about what organic products.
  - Those who know are few and amongst these the demand is high but overall demand for organic products is low
  - Higher prices of organic supplies are a deterrent factor
- 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.

Verification

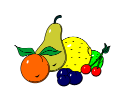
- They buy from specific producers.
- Have their own rigorous systems of checking the suppliers.
- No proper verification systems in place in East Africa as compared to Europe.

Motivation to sell organic food

- Consumers educated and hence start demanding organic food definitely would seek to sell organic more to meet consumer demand
- Supply issues improved in order to meet the demand.

Issues Consumers need to be educated about

- What is organic farming and organic products
- Benefits of consuming organic foods
- Knowledge should be imparted through;
  - Mass media: Radio, TV and Newspapers.



Message bearers

- Producers
- Suppliers
- Products
- Manufacturers
- Governments through particular line ministries such a health, trade, agriculture.
- NGOs also involved in health and / or agricultural issues.

Current Verification Systems

- Designated places in the business premises for organic products
- Menus for restaurants and hotels
- Clearly labeling organic products

Conclusions and Recommendations

Contd

- There is rather a high lack of Consumer awareness in East Africa of organic foods.
- Many don't know or are not sure what it is and even most of those who say they do are not fully conversant with what organic really entails.
- 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.

Contd

- 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
- There may not be any '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

Availability

- 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.

Contd

- Key motivating factors of consumption are **Healthy and safety factors** and these should be the promotional pillars for building or increasing organic consumption in East Africa.
- Perceptions and attitudes towards organic foods appears to be quite positive. Most people see organic as a good concept.

Verification system

- Most people felt there should be some form of verification (69%)
- It 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%).
- 18% said it should be done by NGO's inferring the importance of promoting PGS.

Contd

- As per PR materials 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
- 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. A consideration of the scale of selected promotional should be done.

- 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 should therefore be considered.

Contd

- The main coding of the 'Organic message' should have:
  - Health/Nutrition
  - Quality/safety
  - Tasty

Asante Sana