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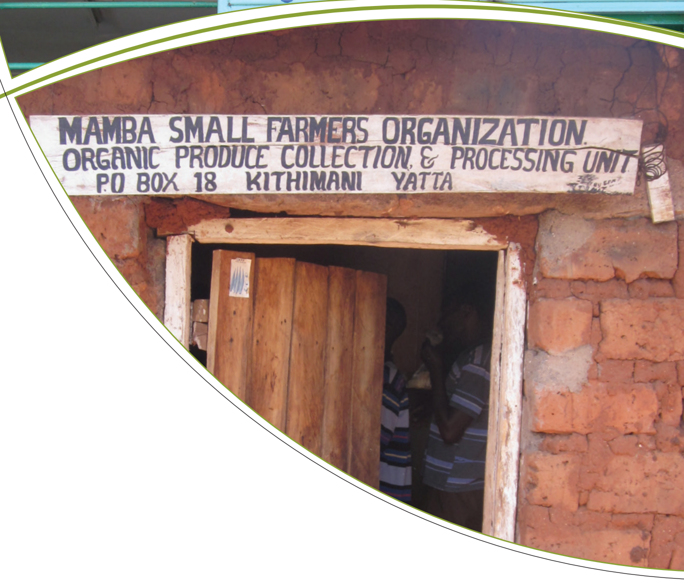

Consumer Survey of Attitudes and Preferences Towards Organic Products in East Africa

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The OSEA project is implemented by IFOAM in close cooperation with the National Organic Agriculture Movements in Burundi (BOAM), Kenya (KOAN), Rwanda (ROAM), Tanzania (TOAM) and Uganda (NOGAMU).

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List of Abbreviations

ABCDE	Social Economic stratification where A is high and E is low
BOAM	Burundi Organic Agriculture Movement
EAOM	East Africa Organic Mark
EAOPS	East Africa Organic Products Standard
IFOAM	International Federation of Organic Agriculture Movements
KOAN	Kenya Organic Agriculture Network
NOAM	National Organic Agriculture Movement
NGO	Non-Governmental Organization
NOGAMU	National Organic Agriculture Movement of Uganda
OSEA II Project	Regional cooperation for organic standards and certification capacity in East Africa
ROAM	Rwanda Organic Agriculture Movement
TOAM	Tanzania Organic Agriculture Movement

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Executive Summary

Awareness of organic foods: The awareness of organic foods and organic farming in East Africa increased from 62% to 67% between 2006 and 2013. The awareness is highest in Uganda (83%) followed by Burundi (75%), Tanzania (63%), Kenya (55%) and Rwanda (48%). The knowledge of organic foods was based on association with various terms, which are loosely used to define organic foods. Awareness was higher among males (70%) compared to females (62%), and was higher for higher social economic class (77%) compared to low social economic class (44%). In addition, awareness was lower in younger respondents compared to older respondents. There has also been increase in awareness of facts about organic foods compared to 2006. The increase was highest in Tanzania.

Source of information on organic foods: The most popular source of information about organic foods is word of mouth and teachings at school or college across the different ideologies of what organic foods are. Other popular sources of information included television programs or adverts and radio programs or adverts. The survey however noted a significant increase in mentions of TV and Radio as a source of information across the countries.

Attitudes and perceptions towards consuming organic foods: Once the respondents are exposed to the definition of organic, an overwhelming majority (93%) felt that indeed eating organic products is good and most of them also agreed that it would be very important to know whether what they consume is organic or not. The respondents also indicated the key motivating factors of consumption as health and safety. The motivation factors for organic also match motivations for purchasing food products in general.

Changes in organic consumption patterns: Almost half of the respondents have consumed organic products (49%). The number of those who were not sure or did not know if they have consumed organic foods went down by a significant 12% from 2006, while those who had considered consuming doubled to reach 12%. An overwhelming majority of those that have consumed mentioned fruits and vegetables and a significant number mentioned cereals. Organic dairy, meats, pasta and bread seem to be gaining in consumption and this can be linked to awareness creation efforts bearing fruit as well as increased availability.

Trust for verification methods: All respondents expressed need for a verification system (56%). Overall, a verification system 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 preferred governments providing verification (70%). The recognition of East Africa Organic Mark (EAOM) is low (17%). The majority of those who recognized EAOM indicated that they had seen the mark on products (34%). This shows the importance of using products as carriers of the mark in enhancing awareness and identification.

Perception of organic foods: Once the respondents were exposed to the definition of organic, an overwhelming majority said that indeed eating organic products is good (88%). They also indicated that with their newly acquired knowledge it would be very important for them to consume organic foods. Additionally they expressed willingness to buy organic products if they are not significantly more expensive than the non-organic products across the socio-economic classes. This is despite the indication by key informants that organic products come with a high price tag.

Attitudes towards organic foods by key informants: Supermarkets, hotels and restaurants are not particularly keen to sell organic products since customers do not know them and therefore do not demand any. According to them what matters more to customers is the taste, the availability, the price and the hygiene and as long as they can deliver on this, they remain competitive in business. Key informants are of the opinion that consumers need to be educated and exposed to the need of consuming organic products. The products must also be made available as consumers' knowledge and awareness increases.

Recommendations

There is need for increased awareness of organic guarantee systems (standards, mark, verification & control) so that consumers can learn how to identify what is organic and what is not. This should be done through increased promotion and use of East African Organic Mark and standard (EAOM and EAOPS).

There may not be any other 'real' barriers to consumption given that the majority of those who have never consumed or considered consuming do not 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. There is therefore need for increased efforts in creating awareness of the benefits of organic foods.

Organic 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.

Organic dairy, meats, pasta and bread are being consumed more and this can be linked to awareness creation efforts bearing fruit as well as increased availability. More efforts to make them available will therefore increase the overall consumption.

Key motivating factors of consumption are still health and safety factors and these should therefore continue to be the promotional pillars for building or increasing organic consumption in East Africa.

The organic market in the East African region has been shown to have a significant potential given the willingness of consumers to pay similar or higher prices for organic products. There is therefore need for concerted efforts in building this market to provide healthy food to consumers and more incomes to farmers.

1 Background Information

1.1. Introduction

Formal organic agriculture in East Africa can be traced back to 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 due to challenges related to lack of government policies and support; knowledge gaps in production, postharvest handling, certification and marketing; and low consumer awareness which have lead to underdeveloped domestic and regional markets. Over recent years, national organic movements and other organic practitioners have been spearheading the development of organic sector in East Africa. 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 a 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.

IFOAM is the only international umbrella organization of the organic world, i.e. all stakeholders contributing to the organic vision. Through its Organic Programs Pillar, IFOAM works on behalf of the organic movement to facilitate organic development: taking up capacity building initiatives for various actors of the supply chain to make the transition to organic agriculture, promoting local organic solutions, collecting and disseminating best practices. In the framework of this pillar, IFOAM is currently implementing the OSEA II Project: Regional cooperation for organic standards and certification capacity in East Africa. The IFOAM OSEA II Project aims at improving income and livelihoods of rural communities in East Africa, through facilitation of trade in organic products by means of a regional standard and regional certification cooperation. The project is a continuation of the successful project to establish a regional organic standard for East Africa. The East African Organic Products Standard (EAOPS) was adopted by the EAC Council in April 2007 and officially launched by the Prime Minister of Tanzania at the organic conference in Dar May 2007. An East African Organic Mark (EAOM) was also established. This has provided the fundaments for a further development of the local and regional markets.

In the first phase of the OSEA project (2006-2007) there was 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 was 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. In the OSEA II project, consumer awareness creation on the EAOPS and the EAOM is one of the components.

The first survey was carried out in 2006 in Kenya, Uganda and Tanzania while the second survey in 2013 in the same countries and two additional ones in Rwanda and Burundi. The first survey provided a baseline for consumer awareness in the three East African Countries that were involved in the OSEA project. The latest survey herein referred to as Total 2013 when including findings from Rwanda and Burundi provides the current status of consumer awareness in the five East African countries and ideas on strategies for improving awareness levels.

KOAN, the National Organic Agriculture Movement in Kenya, was commissioned to carry out this survey on behalf of IFOAM with the help of the National Organic Agriculture Movements in Burundi (BOAM), Rwanda (ROAM), Tanzania (TOAM) and Uganda (NOGAMU).

1.2. Aims and objectives

The survey was aimed at evaluating consumer awareness in East Africa from 2006 and consequently building a basis for future consumer awareness activities.
The following objectives guided the study:

- To identify consumers' attitudes towards organic products and different verification systems in East Africa (Kenya, Uganda, Tanzania, Rwanda and Burundi).
- To guide future awareness raising, advocacy and marketing activities of the organic sector in East Africa

2. Research Methodology and Process

2.1. Technique

Similar to 2006, both qualitative and quantitative methodologies were employed in this survey. In Kenya, Uganda, and Tanzania, quantitative quotas based on age and sex were established based on randomly selected sampling points in 2006 where distribution was based on probability proportionate to size in all the cities. This was done to enable empirical deductions to be made from comparisons between surveys carried out in 2006 and 2013. In each of the three countries, 200 households were selected. In Rwanda and Burundi, a quantitative sample was composed of 50 and 48 households respectively who were randomly selected in the major cities of Kigali and Bujumbura. For the quantitative survey, data was collected from a total of 698 households.

The qualitative survey was carried out amongst Key Informants in each of the 8 cities: two for each country (in Kenya, Uganda, and Tanzania) and one per country (Rwanda and Burundi). The key informants were classified into managers or proprietors of hotels, restaurants, supermarkets and greengrocers. The hospitals and universities had staff working in procurement and agriculture/nutrition department's interviewed respectively. In total 96 key informants were interviewed in the selected cities.

2.2. Survey Instruments

The same instruments used in 2006 were used to achieve 2013 survey objectives with some minor editions based on addition and removal of some questions and inclusion of some new type of respondents for Key Informant Interviews (KII). The instruments used were:

- A discussion guide which was administered to key informants
    - A revised version of these was designed to create relevant questions for hospitals and universities which were the new types of KIIs
- A structured questionnaire with both closed and open-ended questions was administered to consumers for the quantitative random survey. The additional questions for Wave II were based on:
    - Inclusion of hospitals and universities as Key Informants
    - Identification of the product category demanded most – in all countries
    - Including "willingness to pay" for organic products
    - Consumer recognition of the East African Organic Mark.

As in 2006, recruitment questionnaires were also used to help identify suitable respondents who would fit the profile of Key Informants and thus qualified to be interviewed for the survey.

2.3. 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 for national coordinators in Kenya Uganda, Tanzania, Rwanda and Burundi. The 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 in March and April 2013. A total of 32 enumerators were used for the whole survey while representatives of KOAN, NOGAMU, TOAM, ROAM and BOAM acted as field supervisors throughout the fieldwork. They also participated in carrying out Key Informant Interviews.

2.4. Data Processing and Analysis

The data was processed and analyzed over a 2-week period in April 2013. 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 sets.

3. Quantitative Survey Results

3.1. Awareness and Usage of Organic Food Products

In order to gauge the levels of awareness of organic food products, consumers 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 overall sample in 2013, 33% said they did not know or were not sure what the term 'organic foods' means. However, there was a small improvement in awareness compared to 2006 where 38% said they did not know or were not sure what 'organic foods' means. In 2006, the majority of those who were not sure or did not know were from the Tanzanian sample (57%), followed by Kenya (44%) and only 13% from Uganda. In 2013 however, the majority of those who were not sure or did not know were from the Kenyan sample (45%), followed by Tanzania (37%), and finally Uganda (17%).

The Tanzania sample therefore is the key contributor to the decrease in lack of awareness from 2006 to 2013. This may be as a result of highly effective awareness campaigns in the country from which stakeholders in the other East African countries could learn from. Findings in Kenya and Uganda could be an indication that awareness campaigns are still not reaching as many consumers as possible or that the messages are not clear enough. In Rwanda and Burundi those who were not sure or did not know were 52% and 25% respectively; lack of awareness was therefore very high in Rwanda. A comparison of the other responses for 2006 and 2013 is shown in Table 1 below:

Table 1: Understanding of Organic Foods 2006 and 2013

	2013	2006
Natural foods	35%	26%
Foods without chemicals	19%	17%
Foods not sprayed with pesticides	8%	9%
Traditional or indigenous foods	13%	8%
Foods grown with manure	13%	6%
Herbal foods	10%	3%
Healthy/nutritious foods	7%	3%

Fig 1 below shows the Total Wave II responses by age, gender and socio-economic class.

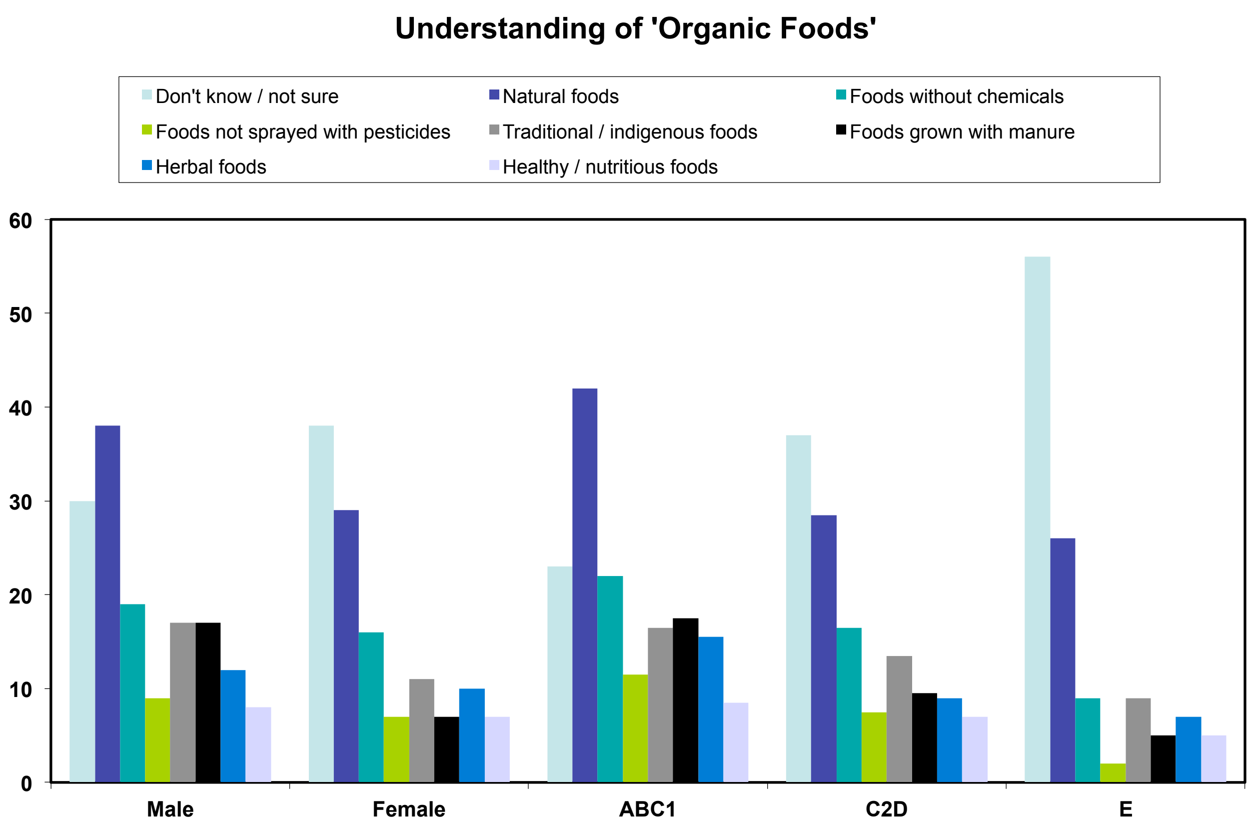


Fig 1: Understanding of Organic Foods by Gender and SEC, 2013

It is evident from the figure above that from those who responded with 'don't know or not sure' to what organic foods are that the lack of awareness is higher amongst female consumers compared to male consumers, and similarly the lack of awareness is higher in the lower socio-economic classes (E and C2D) compared to the higher SECs (ABC1). The differences in terms of age are minimal with all age bands having roughly similar proportion of respondents who don't know or are not sure what organic foods are; percentages range in the thirties. However, there are generally more of younger than older people who are unsure or do not know what organic foods are. These disparities in awareness can be linked to the extent to which different groups of people are generally exposed to information or lack thereof. In many East African countries men have more and better access to information than women and the same is true for higher socio-economic classes as compared to the lower ones who are also likely to have lower education levels hence not as good an understanding of topical issues.

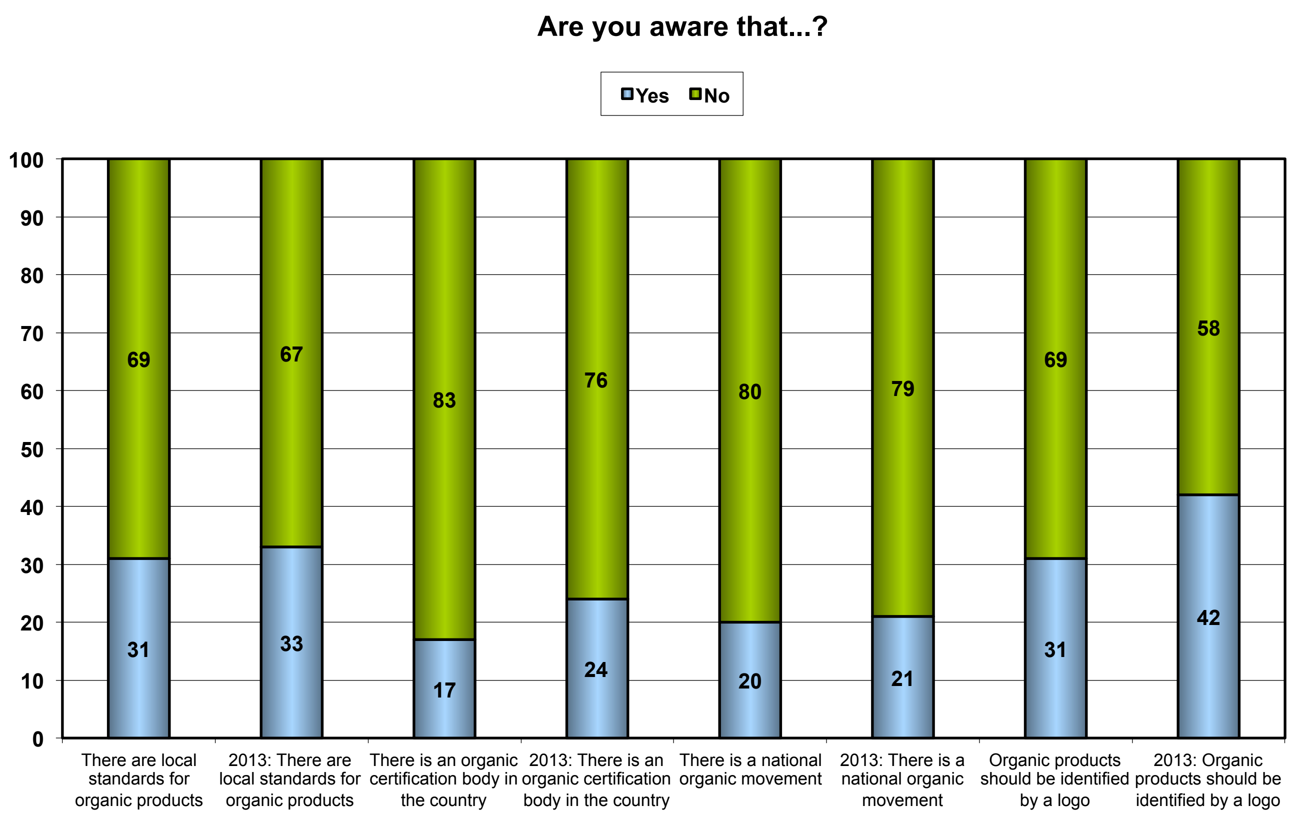
The consumers were also asked their source of information on what organic food products are. In 2006, word of mouth and teachings at school or college appeared to be the most common source of information across the different ideologies of what organic foods are. Television programs or adverts and radio programs or adverts followed this. Though the same sources of information remain strong in 2013, there are notable differences in that there is generally a significant increase in mentions of TV and Radio as the source of information and a significant decline in word of mouth and school/college, which were previously the most dominant. Additionally newspapers, which in 2006 did not feature as one of the more prominent sources, now appear to be a significant source of information on organic foods. Details of all 2013 responses can be seen in the table below for responses with an above 1% mention rate.

Table 2: Source of Information on what Organic Foods are 2013

	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 =)	233	123	55	96	85	75	52
Percent	100%	100%	100%	100%	100%	100%	100%
Word of mouth	19%	20%	15%	25%	22%	11%	23%
Taught in school / college	26%	16%	9%	6%	25%	9%	17%
Television programmes /adverts	20%	12%	20%	9%	12%	17%	10%
Radio programmes / adverts	14%	15%	7%	8%	15%	15%	17%
Books	13%	10%	9%	13%	7%	9%	4%
Don't know / not sure	5%	6%	11%	13%	4%	12%	13%
Newspaper	10%	10%	15%	9%	13%	17%	8%
Magazines	5%	8%	15%	2%	7%	7%	6%
At a promotional / educational event	10%	8%	4%	4%	8%	5%	4%

Consumer awareness of certain facts on 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 comparing 2006 and 2013. Although awareness still remained fairly low across all the facts (below 50%), there was an increase in awareness across all facts ranging from 1% to 11% indicating that consumers are gradually becoming more informed on matters to do with organic products.

Fig 2: Awareness of Organic Facts



All 2013 responses grouped by country are provided in Table 4 below where it is evident that, similar to findings in 2006, awareness in Tanzania was somewhat higher for most of the statements 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. Rwanda and Burundi findings show much lower awareness for some of the facts in comparison to other countries. Consumers in both of these countries are largely unaware of the existence of national organic movements. In Rwanda they also do not know that local standards for organic products exist. However, the majority of consumers in Rwanda are at least aware that organic products should be identified by a logo and this is in fact the highest awareness for this fact across all the countries.

Table 3: Awareness of Facts on Organic Products / Farming 2013 (Total)

		Kenya	Uganda	Tanzania	Rwanda	Burundi
There are local standards for organic products	YES	24%	26%	48%	6%	23%
	NO	77%	74 %	52%	94%	77%
There is an organic certification body in Kenya / Uganda / Tanzania	YES	22%	17%	34%		
	NO	78%	83%	66%		
There is a national organic movement in Kenya / Uganda / Tanzania/Rwanda/Burundi	YES	11%	33%	21%	8%	2%
	NO	89%	67%	79%	92%	98%
Organic products should be identified by a logo	YES	31%	24%	70%	72%	35%
	NO	69%	76%	31%	28%	65%

Further, to gauge awareness of organic products, respondents in all five 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. **Table 4** below shows the results.

Table 4: Have you ever heard of… and, if so, that it is Organic? 2013 (Total)

	EVER HEARD OF?		**AWARE T IS ORGANIC?**	
		(%)	**YES (%)**	**NO (%)**
Out of Africa Coffee	**YES**	17	19	81
	NO	83		
Meru Herbs	**YES**	17	27	73
	NO	83		
Kate's Organic Tea	**YES**	14	30	70
	NO	86		
Tanika Coffee	**YES**	65.5	29	71
	NO	34.5		
Chai Bora	**YES**	93.5	26	74
	NO	6.5		
GFP Jams/Honey	**YES**	64	30	70
	NO	36		
Sulma Honey	**YES**	25	77	23
	NO	75		
Sulma Herbs	**YES**	14.5	76	24
	NO	85.5		

A2N Dried Pineapples	**YES**	32	68	32
	NO	68		
A2N Dried Apple Bananas	**YES**	32	69	31
	NO	68		
Organic spices from- Uganda Crop Industries Ltd-Organic vanilla	**YES**	4		
	NO	96		
Kivu bourbon coffee	**YES**	28		
	NO	72		
Floris organic pineapple	**YES**	4		
	NO	96		
Floris organic apple banana	**YES**	4		
	NO	96		
Naprome organic tomatoes	**YES**	4		
	NO	96		
Gako organic French beans	**YES**	4		
	NO	96		
Organic kamaramasenge banana	**YES**	100	70	30
	NO	0		
Organic dura palm oil	**YES**	85	57	43
	NO	15		
Organic traditional lengalenga	**YES**	100	66	34
	NO	0		
Organic kirundo	**YES**	100	63	38
	NO	0		
Tenera Palm oil	**YES**	100	64	36
	NO	0		

Tanika Coffee (Tanzania), Chai Bora (Tanzania), GFP Jams/Honey (Uganda), and all the products from Burundi turned out to be significantly well known. The attachment of the term 'organic' to most of the Burundi products and reference to traditional foods as organic rather than brands however could have led to higher claims of awareness of them being organic than was necessarily true, unlike other products from other countries for which the majority of consumers do not know if they are organic although they enjoy high general awareness.
On usage, consumers were asked whether they have ever consumed or considered consuming organic products. As in 2006, the majority of the overall sample in 2013 claimed they had consumed organic products (49%), the exact same percentage in 2006. The number of those who were not sure or did not know went down from a significant 34% in 2006 to 21% in 2013 while those who had considered consuming doubled from 6% in 2006 to 13% in 2013. However, the proportion of those who said no also went up to 18% in 2013 from 11% in 2006. There were no major differences when looking at the total 2013 sample (including Rwanda and Burundi) where 51% had consumed, 14% had considered consuming, 15% had not, and 20% did not know or were not sure. Unlike 2006, 2013 recorded some significant differences in response by country. Kenya had the highest proportion (32%) of those who had not consumed or considered consuming organic products as compared to 13% in Uganda, 7% in Tanzania and 2% each in Rwanda and Burundi. Burundi on the other hand had the highest proportion of those who had consumed organic products (83%) compared to 61% in Uganda, 49% in Tanzania, 40% in Rwanda and 37% in Kenya. Expectedly, as was also the case in 2006, the higher socio-economic classes were the majority in terms of those who had consumed organic products, ABCI being at 56%, as compared to C2D and E at 46% and 40% respectively. However there was a notable increase in those in Class E who had consumed organic products as the proportion recorded in 2006 was 24%, signaling availability of organic foods for lower social economic classes.

Those who said they had consumed or considered consuming organic products were further asked to specify which types of organic foods these were in particular. As expected an overwhelming majority mentioned organic fruits and vegetables (92% in 2013, 85% in 2006), followed by organic cereals which received 61% of mentions in 2013 and 35% in 2006, then organic dairy products and organic meat at 43% in 2013 up from 16% in 2006 and 33% in 2013 up from 14% in 2006 respectively and finally organic bread and pasta at 22% in 2013 and 8% in 2006. Overall there is an increase in consumption across the different categories implying increased conversion of awareness into usage but also potentially the increased availability of organic products in the markets other than just fruit and vegetable compared to 7 years ago. Organic fruits and vegetables were popular across the three original countries as well as in Rwanda and Burundi. Uganda appears to have improved tremendously on organic cereals whereby in 2006 there was only a mere 8% mention while in 2013 this went up to 53%. Also while there was 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%) in 2006, in 2013 significant improvement was recorded for organic dairy at 21% and slight improvements for bread and pasta at 7% and meat at 8%. Rwanda and Burundi recorded higher mentions of organic cereals (90% and 73% respectively) as compared to 69% in Tanzania, which was the leader in this category in 2006 at 65%, 61% in Kenya and 53% in Uganda. Burundi also recorded the highest mention for organic bread of 90%.

Reasons for consumption of the different types of organic food products were also explored and these are tabulated below for the total 2013 sample.

Table 5: Reasons for Consumption of Organic Food Type, 2013 (Total)

	FRUITS & VEGETABLES	CEREALS	DAIRY PRODUCTS	MEAT	BREAD AND PASTA
BASE	413	289	215	173	141
	100%	100%	100%	100%	100%
They are healthy / nutritious	56%	49%	54%	42%	35%
They are safe to consume / not contaminated	17%	14%	12%	11%	6%
They are tasty	27%	24%	32%	28%	23%
They are readily available	11%	11%	11%	8%	7%
Good for management of illnesses	17%	11%	9%	10%	4%
They are affordable	10%	11%	9%	9%	11%
They are environmental friendly	6%	4%	0%	1%	4%
Makes me feel in touch with my indigenous roots	5%	10%	10%	9%	8%
No specific reason / indifferent	4%	9%	8%	12%	19%

Similar to 2006 findings, the health/nutrition factor in 2013 appeared to be the key motivating factor of consumption / purchase of organic foods followed by taste. Similarly, the health factor and taste factor also appeared to be ranked highly as key considerations when purchasing any food products in general (not organic per se) when respondents were asked to rank seven key purchasing considerations from most important to least important. In 2013 however availability moved up one rank higher to take the place that was previously occupied by taste. By working out a mean score, the ranking was as follows:

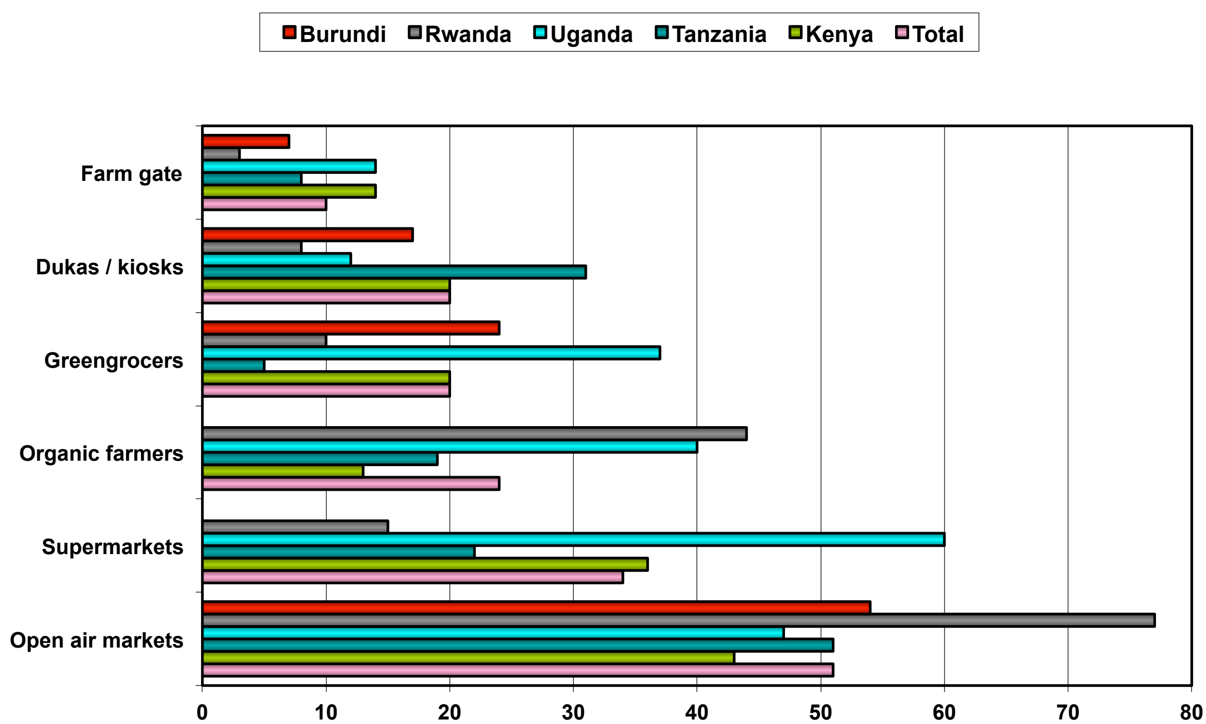
Fig 3: General Purchase/Consumption Motivating Factors (from most to least important), 2006 & 2013

2006	**2013**	**Total 2013**
Price / affordability	Price/affordability	Price/affordability
Health / nutrition value	Health/nutrition	Health/nutrition
Packaging quality	Packaging quality	Packaging quality
Taste	Availability	Availability
Availability	Taste	Taste
Packaging size	Packaging size	Packaging size
Brand name	Brand name	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. The increase in importance of availability in 2013 also signals that organic foods need to be readily available if consumers are to take them up. 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% in 2006, had no specific reasons or, were indifferent. This proportion went down significantly in 2013 to 30%. Findings in 2006 implied that there were possibly no real barriers or resistance to consumption of organic products. What was potentially lacking at the time was more education and awareness of organic products and farming to drive home the benefits so as to make consumers keener to consume organic. The situation has however changed seven years down the line. Seemingly consumers are now more aware of the existence of organic products and what they are. The barriers to consumption are now however real – cost and availability. In 2006 those who gave availability as their reason for non-consumption were at 8% while in 2013 this percentage was at 23%. Similarly the proportion of those who cited cost as a reason went up to 13% in 2013 from 5% in 2006. Availability and cost therefore needs to be addressed now.

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

Fig 4: Preferred Outlet for Purchase of Organic Products, 2013 (Total)



Different from 2006 where supermarkets were the overall most preferred outlet at the time particularly in Kenya and Uganda, in 2013 supermarkets come second to open air markets overall especially in Rwanda though supermarkets still remain the favorite outlet in Uganda before open air markets. Organic farmers were third overall but particularly popular in Rwanda and Uganda. Greengrocers were also very popular in Uganda coming a close fourth to organic farmers while in dukas/kiosks came in at number two after open air markets. This indicates the increased popularity of organic markets where they exist for example Kenya.

Respondents who said that they have consumed or considered consuming organic foods products were also asked how they would verify that the foods they are buying or consuming are organic. 19% down from 31% in 2006 said they buy or would buy from specific farmers who they know practice organic farming, 23% down from 30% in 2006 said they would check the labels, 27% compared to 30% in 2006 indicated that they purchase or would purchase from specific shops that they know sell organic products, 14% compared to 24% in 2006 said they practice their own organic farming, 7% down from 19% in 2006 were not sure or did not know while 14% down from 18% in 2006 said they would only purchase specific brands that they know to be organic. These figures were more or less the same with Rwanda and Burundi included in the sample for 2013. In general this shows a decrease in consideration for a verification system when buying organic products with buying from specific shops being the most popular.

Further the respondents who mentioned any given verification method as discussed above were asked whether they trust this method or not. The findings, tabulated below, reveal that trust levels for all the different verification methods have gone up from 2006 to 2013:

Table 6: Trust of Verification Methods, 2006 & 2013

	2006			**2013**			**Total 2013**		
	TRUST			**TRUST**			**TRUST**		
VERIFICATION METHOD	**No**	**Yes**	**Not sure**	**No**	**Yes**	**Not sure**	**No**	**Yes**	**Not sure**
Buying from specific farmers who practice organic farming	14%	77%	9%	15%	84%	1%	16%	82%	2%
Checking labels	18%	75%	7%	18%	81%	1%	18%	78%	4%
Purchasing from specific shops that are known to sell organic products	22%	69%	9%	18%	79%	3%	23%	74%	3%
Practicing own organic farming	15%	73%	11%	14%	82%	4%	14%	82%	4%
Purchasing specific brands known to be organic	11%	77%	12%	13%	83%	4%	12%	83%	5%

All respondents were asked whether or not they felt that there was need for a verification system to which they had to answer yes or no. In 2013 the majority said yes (56%), though this was lower than the proportion in 2006 (69%). In Kenya, 41% down from 52% in 2006 said yes, in Tanzania 68% compared to 70% in 2006 said yes, in Uganda 61% down from 85% in 2006 said yes while in Rwanda and Burundi 70% and 75% of the respondents respectively said yes. Overall, need for a verification system also appeared to be more important to the higher socio-economic groups than the lower ones a finding similar to that in 2006. Those who felt there was need for a verification system were also asked to state who should be in-charge of providing this verification. The majority mentioned the government (70% in 2013 up from 51% in 2006). This received the highest mention across the three countries though the biggest contributor to the increase was Uganda, which moved from 32% to 67%. Kenya went up to 59% from 46%, and Tanzania remained stable at 79% from 78%. In Rwanda and Burundi, the government was also mentioned most, 57% and 67% respectively. Out of those who felt a need for verification, 32% in 2013 up from 19% in 2006 also said it should be provided by an independent certification body, and, 30% in 2013 up from 18% in 2006 said it should be done by NGOs working with farmers. Other responses given were companies buying from farmers, 19% up from 10% in 2006, groups of producers 10% up from 7% in 2006 and the producer himself 15% up from 6% in 2006.

All survey respondents were also tested on the recognition of the East African Organic Mark. It was shown to them and they were asked whether they had ever seen it. Majority (83%) had never seen it. Only 17% answered in the affirmative. Uganda had the highest proportion of those who had seen the mark (29%), followed by Kenya (21%). Tanzania was third with 9% while in Burundi only 2% had seen the mark. None of the respondents in Rwanda had ever seen the mark. This was a new survey question as the mark did not exist until after 2006, hence no prior data to provide comparisons between 2006 and 2013. Those who confirmed that they had seen the mark before were also asked where they had seen it. The majority said they had seen it on products (34%), followed by posters (30%). TV came in third at 25%, followed by newspapers and the Internet both at 12%. Another 14% said they were not sure. This shows the importance of using products as carriers of the mark in enhancing awareness and identification.

3.2. 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 is highlighted on the following page.

"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 (93%) said that organic products were a good thing. This finding is identical to that in 2006. The positive response cut across the five countries, towns, age groups and socio-economic classes of different respondents. 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 as in table 9 which shows that, in Wave II, the majority had no dislikes or were not sure (78%). Note that the countries Rwanda and Burundi also represent the towns Kigali and Bujumbura since all interviews conducted in these countries were done in the capital cities:

Table 7: Analysis of Likes & Dislikes in Organic Agriculture Concept, 2013 (Total)

		Exclusion of chemical fertilizers	**Encouragement of biological natural processes**	**Exclusion of synthetic pesticides**	**Farm animals allowed to exhibit natural behavior**	**Exclusion of genetically modified organisms**	**Exclusion of antibiotics**	**Not sure**
TOTAL	Like	47%	52%	34%	31%	20%	20%	7%
	Dislike	10%	1%	6%	7%	8%	7%	78%
Kenya	Like	64%	45%	45%	33%	22%	24%	2%
Uganda	Like	31%	59%	29%	36%	16%	17%	9%
Tanzania	Like	56%	40%	30%	16%	15%	18%	10%
Rwanda	Like	28%	66%	30%	54%	36%	24%	16%
Burundi	Like	30%	81%	32%	43%	28%	26%	4%
Nairobi	Like	62%	44%	39%	25%	20%	20%	1%
Mombasa	Like	69%	48%	63%	56%	27%	35%	4%
Kampala	Like	31%	64%	32%	39%	3%	15%	11%
Jinja	Like	31%	34%	10%	17%	8%	24%	0%
Dar es Sal	Like	61%	33%	30%	17%	15%	18%	11%
Zanzibar	Like	25%	96%	29%	13%	8%	17%	0%

Generally it appears that the most liked aspects across the countries and towns are the 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. These findings more or less mirror those of 2006.

Respondents were asked to rate the importance of consuming organic products (based on the definition above) on a scale of 1 to 10 (where 1 is not important at all, and 10 is very important). Overall, the majority gave high scores hence a mean score of 8.8 up from 8.1 in 2006. With Rwanda and Burundi included, the mean score derived was 8.7. This implies that lack of awareness of organic products is what leads to low or non-consumption of organic products.

In an additional question in this wave of the study, respondents were questioned on their willingness to purchase organic products. A set of statements was read out to them and they were asked to state whether they agreed or disagreed with them. The findings can be seen in table 8 below:

Table 8: Willingness to Purchase Organic Products, 2013 (Total)

			Socio-Economic Class					
STATEMENTS	**TOTAL (%)**		**ABCI (%)**		**C2D (%)**		**E (%)**	
	Yes	**No**	**Yes**	**No**	**Yes**	**No**	**Yes**	**No**
I will only buy or consider buying organic products if they are cheaper than non-organic products	64	36	58.5	41.5	66.5	33.5	60	40
I will only buy or consider buying organic products if they are more or less the same price as non-organic products	73	27	73.5	26.5	74.5	25.5	61	39
I will buy or consider buying organic products even if they are slightly more expensive than non-organic products	74	26	75.5	24.5	76	24	61	39
I will buy or consider buying organic products even if they are significantly more expensive than non-organic products	55	45	51	49	57.5	42.5	53	47

The findings reveal that most consumers are generally willing to purchase organic products if the prices are either lower, at par with other products or even slightly more expensive. However if organic products are significantly more expensive, then many more consumers (45%) would opt out. It is important to note nonetheless that a significant proportion (55%), are willing to purchase organic products even though they are significantly more expensive than non-organic products. That said, 45% who would not be willing to do so is also a significant proportion of consumers who should not be ignored. This is an indication of the importance of pricing in organic consumption.

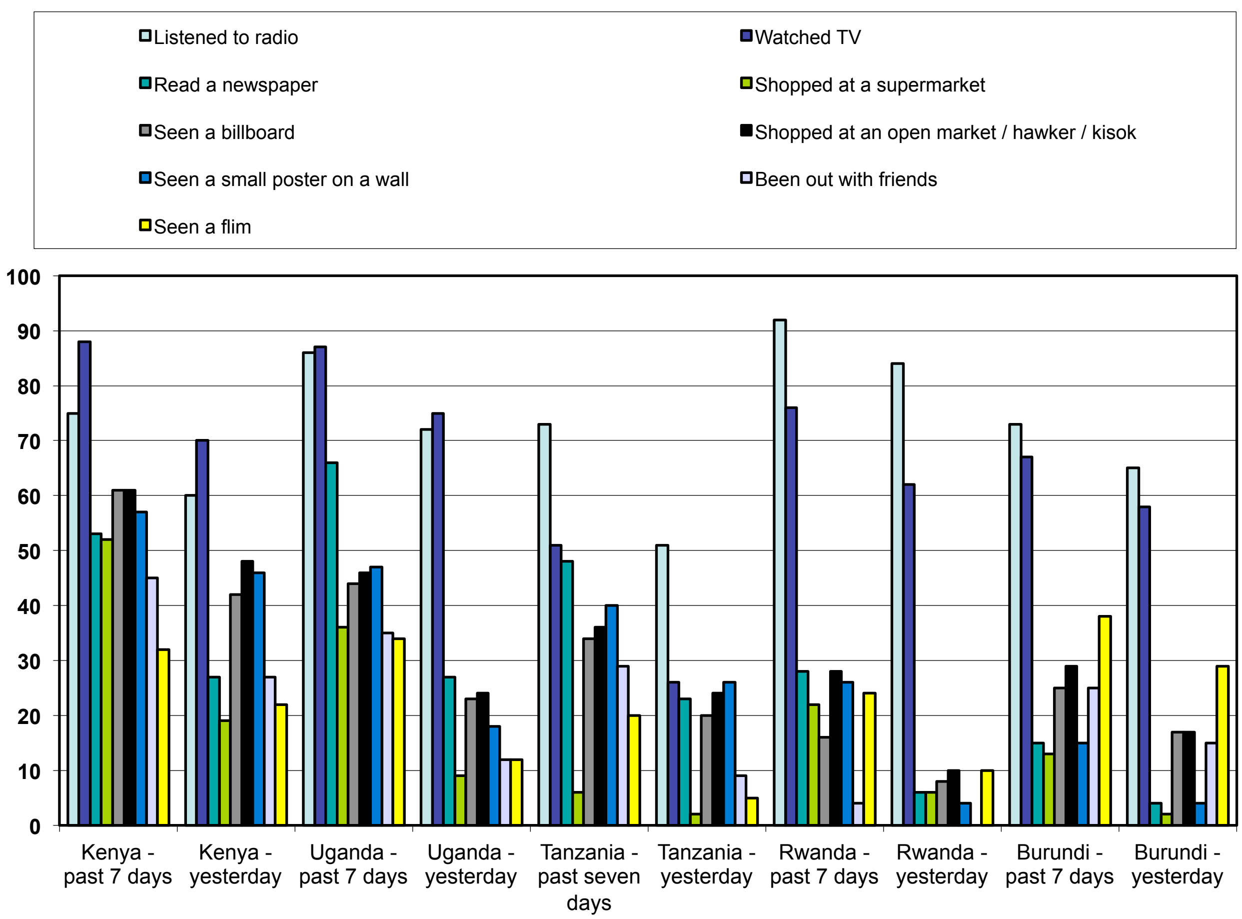
In order to gauge what consumers would most associate with organic foods, respondents were exposed to several short statements and asked to state, which one they felt was most suited to organic foods. The key associations were: 'is very nutritious / healthy', 'is very tasty', 'is safe' and 'is for everyone'. This is similar to the findings in 2006. In 2013, 'is affordable' was also a key association in Burundi while 'fashionable/trendy' was also a key association in Tanzania.

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. 17% of the total 2013 sample said that there should be more awareness raising and marketing of organic products, while 15% said there should be some form of training or education provided on organic products. Another 7% suggested that the government should support organic farming while 39% had no suggestions.

3.3. 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, country by country, are shown in the chart below:

Fig 5: Media Activities for Last Seven Days and Yesterday, 2013 (Total)



The following would be key TV stations and newspapers to use for a campaign keeping in mind the urban bias of the survey. The radio, TV stations and newspapers most often listened to/ watched/read in the past seven days were as follows:

Country	Radio	TV	Newspapers
Kenya	Citizen FM 20% Classic FM 12% Kameme FM 10% Kiss FM 7%	Citizen 56% NTV 17%	Daily Nation 61% The Standard 19%
Uganda	Clouds FM 37% Radio One 18%	WBS 16% UTV 13%	Bukkedde 46% New Vision 29% The Monitor 15%
Tanzania	CBS One 15% Capital FM 14% Radio Simba 13%	ITV 25% TVT 17% East Africa TV 15% TV Zanzibar 13% Star TV 10%	Mwananchi 35% Daily News 10% Mwanaspoti 10%
Rwanda	Radio Rwanda 74%	TV Rwanda 94%	The New Times 33% Imvaho Nshya 33%
Burundi	Voice of the Revolution 84%	Television Nationale du Burundi 54% Reinnaissance 32%	Le Renouveau du Burundi 25%

These would be key stations to target during promotions or campaigns although it is important to note that like in 2006, this survey was purely urban hence if a rural population is also to be targeted the radio stations would need to be considered in different strengths as would be relevant for the rural populace.

4. Qualitative Survey Findings

4.1. Composition of Key Informant Interviews

Table 9 below shows the total composition by country of the different key informant interviews carried out.

Table 9: Key Informant Interview Composition

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

4.2. 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 relating to consumer preference for food products. The following issues were mentioned most and are listed in descending order across the countries:

- High quality products
- Availability of products/supply
- Price / affordability
- Variety of products to select from
- Demand / customer taste and preferences / taste
- Origin / source of product– is it credible / trustworthy?

- Presentation / packaging
- Expiry dates
- Weight

Similar issues were found in 2006.

4.3. Issues Taken into Consideration when Stocking Food

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

- High quality of products
- Price / affordability – 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?
- Availability – is there a reliable and consistent flow from suppliers so that they do not end up disappointing their customers?
- Customer preference – because customer preference varies they try to cater for most needs and demands
- Demand – is demand amongst their customers high for that type of products?
- Expiry date – how long a shelf life do the products have vis a vis demand and supply?
- Origin / source of products – is the source reputable in terms of product quality?
- Packaging, presentation and processing (hygiene)

These issues were common across the five countries and across the different types of key informants. What emerges here is that business decisions are driven by ensuring that the customer gets the very best, and, that their needs and preferences are met.

4.4. Attitudes towards Organic Foods

Key informants were also asked to share their views on organic foods. Similar to findings in 2006, the majority was 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 compared to non-organic and some even said that they are tastier. Some mentioned that consumers who have learnt about organic products and discovered their benefits are very keen on them and prefer to consume organic. In Mombasa and Dar-es-Salaam, the respondents reported however that the majority of customers who demand organic products are foreigners as opposed to locals who do not yet appreciate the benefits of organic. Others said that although organic foods present very attractive benefits of consumption, they are significantly more expensive than non-organic, hence most who consume them are middle to upper class persons as the majority belong to the lower social classes and can not afford organic products.

When asked what they sell, organic or non-organic, most said that they sell both but more non-organic and the main reason for this was that they complained there is a very limited and unreliable supply of organic products. Additionally the key informants said that demand is not very high because most people do not know or understand much about what organic products are and so do not ask specifically for organic products. Those who know are few and amongst them demand is high, but overall demand for organic products is low. The higher prices of organic were also a deterrent factor for some key informants who said that margins on theses products would not be as good as on non-organic. These findings were identical to those in 2006.

Thus most key informants admitted that despite their knowing about the value and benefit of organic, they do not place a high priority as such on 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.

When asked how they ensure what they are stocking is organic, most said that they buy 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 compared to Europe. A few organic restaurants said that they have their own farms therefore are confident that the processes they use on their farms are organic.

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 levels in as far as quality is concerned saying that their customers who purchased organic were very happy with the quality. However in terms of price and availability the 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 they indicated that suppliers were few and unreliable and this reflects very negatively on them when they fail to deliver to their customers. They were therefore not confident in the supply of organic products for fear of disappointing their customers when supply fails. 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.

4.5. 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. Similar to 2006, 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; some even going as far as saying that even if the price of organic is higher consumers would buy organic if they fully understood the dangers of 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, in particular line ministries such a health, trade, agriculture. Other participants could be NGOs also involved in health and / or agricultural issues. Other suggestions for increasing awareness made by the respondents include seminars and food exhibitions.

Asked whether they as business people in the food industry have played any role in trying to promote organic products, a significant number said they had not. A significant number also answered in the affirmative though clarifying that what they had been able to do was of very small scale and 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 advise consumers.

4.6. 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 that 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 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 neither aware of the standards available for organic products nor whether their suppliers had certification on this. A few whose businesses are solely organic were aware of organic standards and whether or not the suppliers were certified by asking for organic certificates.

5. Conclusions and Recommendations

There is evidently some increase in awareness of organic foods and organic farming in East Africa as compared to seven years ago when the first study was done. Overall there is still a limited awareness. Many do not 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 entails. It is not surprising therefore that consumption levels are modest or low; slightly over half the sample have never consumed nor considered consuming organic. This is the main reason why supermarkets, hotels, restaurants and other outlets are not particularly keen on selling organic products. There is therefore a need to increase awareness of organic products, their benefits and guarantee systems (standards, mark, verification & control) so that consumers can learn how to identify what is organic and what is not. This could be done through increased promotion and use of the East African Organic Mark and standard (EAOM and EAOPS). In addition, the study has shown that what matters more to customers is taste, availability, price and hygiene which rhymes with what consumers' associate with organic products. Consumers have also shown the willingness to pay same or slightly higher prices for organic products. Key informants are therefore of the opinion that consumers really need to be educated and exposed to the benefits of organic products for consumption levels to grow.

There may not be any other 'real' barriers to consumption given that the majority of those who have never consumed or considered consuming do not 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. 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, in 2006 an overwhelming majority talked of fruits and vegetables and a significant number also mentioned cereals. As per the findings in 2013 however, organic dairy, meats, pasta and bread, now seemed to be gaining in consumption and this can be linked to awareness creation efforts bearing fruit as well as increased availability. Key motivating factors of consumption are still health and safety factors and these should therefore continue to be the promotional pillars for building or increasing organic consumption in East Africa. This notion is strengthened by the fact that when speaking about the purchasing of food products in general, some of the top considerations are health and safety issues for the majority of those interviewed. Price is however also a top consideration and this must be looked into given that key informants complained that the price of organic is considerably higher than that of non-organic foods.

Despite awareness levels being low, perceptions and attitudes towards organic foods appear to be quite positive. This is evident from the reactions to the working definition or description of organic products. Once the respondents were exposed to this, an overwhelming majority said that indeed organic products are good and that it would be good to consume them. In addition, consumers expressed willingness to buy if organic products are not significantly more expensive than non-organic - this is true across all socio-economic classes. Since respondents from food outlets expressed appreciation for organic food and its benefits, it shows that organic markets in East African region have a lot of potential.

On verification systems, many are not aware of any existing verification systems although a significant number mentioned the use of labels. There is a need to increase awareness of verification systems so that consumers can learn how to identify what is organic and what is not. The East African Organic Mark could be a crucial tool for this, and as the survey shows, using the mark on the products is one of the best tools to increase recognition of the mark.

6. Appendices

6.1. Demographic Details of Survey Respondents

Table 10 below shows the total sample breakdown by country in terms of town, gender, socio-economic class, age, and education level.

Table 10: Demographic Details of Survey Respondents

		COUNTRY					TOWN								AGE					GENDER		Social Class				
	Total Sample	Kenya	Tanzania	Uganda	Rwanda	Burundi	Nairobi	Mombasa	Dar es Salam	Zanzibar	Kampala	Jinja	Kigali	Bujumbura	18-24	25-34	35-44	45-55	56+	Male	Female	AB	C1	C2	D	E
Total Sample	691	200	200	193	50	48	152	48	176	24	164	29	50	48	149	250	153	97	42	368	323	70	154	209	201	57
Nairobi	22%	76%	-	-	-	-	100%	-	-	-	-	-	-	-	28%	22%	22%	20%	7%	16%	29%	16%	19%	20%	26%	30%
Mombasa	7%	24%	-	-	-	-	-	100%	-	-	-	-	-	-	9%	7%	5%	4%	14%	7%	7%	4%	4%	7%	9%	12%
Dar es Salam	25%	-	88%	-	-	-	-	-	100%	-	-	-	-	-	15%	20%	31%	40%	36%	28%	22%	14%	22%	28%	31%	19%
Zanzibar	3%	-	12%	-	-	-	-	-	-	100%	-	-	-	-	5%	2%	3%	6%	7%	3%	4%	1%	1%	4%	5%	5%
Kampala	24%	-	-	85%	-	-	-	-	-	-	100%	-	-	-	26%	28%	22%	18%	12%	27%	20%	41%	27%	26%	16%	12%
Jinja	4%	-	-	15%	-	-	-	-	-	-	-	100%	-	-	5%	3%	5%	5%	5%	5%	3%	7%	2%	1%	6%	9%
Kigali	7%	-	-	-	100%	-	-	-	-	-	-	-	100%	-	5%	8%	6%	7%	14%	6%	8%	6%	6%	11%	4%	11%
Bujumbura	7%	-	-	-	-	100%	-	-	-	-	-	-	-	100%	8%	10%	7%	-	5%	7%	7%	10%	19%	3%	2%	2%

6.2. Annex 1: Survey Questionnaire

A SURVEY ON CONSUMER ATTITUDES AND PREFERENCES TOWARDS ORGANIC FOODS IN KENYA, UGANDA, TANZANIA, RWANDA, AND BURUNDI MARCH 2013

Respondent's name (complete at end of interview)____ PO Box____	
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.	Interviewer's signature.

Country

Kenya	1	**Tanzania**	2	**Uganda**	3	**Rwanda**	4	**Burundi**	5

Town

Nairobi	1	**Dar es Salaam**	3	**Kampala**	5	**Kigali**	7
Mombasa	2	**Zanzibar**	4	**Jinja**	6	**Bujumbura**	8

Sample point number:

START HERE: SAMPLING

1) Speak to any adult at the selected household

Write down first name of the adult spoken with:___________________________

S1) Read out introduction

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.

Only if necessary: 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, Uganda, Rwanda and Burundi.

FOR RWANDA AND BURUNDI

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

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 **MUST** 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

FOR KENYA, UGANDA AND TANZANIA

2) Randomly select one person who lives there who fits the quotas you have been assigned, even if not at home at present

S2) Please could you tell me the first names of each adult who… (describe all the quotas you have been assigned in terms of age and gender) 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. **(Remember to exclude domestic workers. If there is more than one person who satisfy your quotas then fill in the table below and select as per instructions below)**

List all the adults in the household here who fit the assigned quotas you are seeking to fill	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 **MUST** 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 (S2) 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 and code appropriately)***

		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 responses allowed.***

A4bi) NEW. Please rate each of the following types of organic foods in terms of their importance to you on a scale of 1 to 10 where '1' means not important at all and '10' means very important.
Increasing importance

1	2	3	4	5	6	7	8	9	10

Read out each food type and fill in the rating in the space provided against it.

	A4b	A4bi NEW
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)***? ***<u>Do not read out responses</u>***

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 environmentally 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? ***<u>Do not read out responses.</u>***

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)***	

<u>For those coded 1 and 2 at A4 ask A5b and A5c otherwise skip to A6</u>

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 not / 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
Organic farmers markets (NEW CODE)	8	8
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) <u>***For all those products aware of at A6 ask:***</u> Did you know that ____________ ***(mention product)*** is an organic product? ***Code answers in the grid below.***

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

A9) <u>***For all those products aware of at A6 and for which they are aware are organic at A7 ask:***</u> 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	Kate's Organic Tea	1	2	1	2	1	2	1	2
	TANZANIA PRODUCTS (BRANDS)	**YES**	**NO**	**YES**	**NO**	**YES**	**NO**	**YES**	**NO**
a	Tanika Coffee	1	2	1	2	1	2	1	2
b	Chai bora Herbal tea	1	2	1	2	1	2	1	2
c	GFP Jams/Honey	1	2	1	2	1	2	1	2
	UGANDA PRODUCTS (BRANDS)	**YES**	**NO**	**YES**	**NO**	**YES**	**NO**	**YES**	**NO**
a	Sulma Honey (certified under EAOS)	1	2	1	2	1	2	1	2
b	Sulma Herbs (Sulma cardamon, Sulma cinnamon, Sulma Black pepper)	1	2	1	2	1	2	1	2
c	A2N dried pineapples (Ceres	1	2	1	2	1	2	1	2

	certified)								
d	A2N dried apple bananas	1	2	1	2	1	2	1	2
e	Organic spices from- Uganda Crop Industries Ltd-Organic vanilla								
	RWANDA								
a									
b									
c									
d									
e									
	BURUNDI								
a									
b									
c									
d									
e									

<u>Ask All</u>

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. ***<u>Write in the order from 1 to 7 in the column next to the attributes</u>***

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

<u>Ask those coded 1 and 2 at Q.A4, others go to A15 NEW</u>

A11) How do you / would you verify or know that the foods you are buying / consuming are organic? ***Read out. <u>Record answers in the table below</u>***

<u>Ask for each method of verification mentioned at A11.</u>

A12) Do you trust this method of verification of ____________ (mention method of verification)?

<u>Record answers in the table below</u>

	A11	A12		
		Yes	No	Don't know / not sure
Only purchase from specific shops that I know sell organic	1	1	2	99

products				
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 A15 NEW

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)***	

A15) NEW. Have you ever seen this mark anywhere? ***Show respondent East African Organic Mark***

Yes	1	**Continue**	No	2	**Skip to B**

A15b) NEW. Can you please tell me where you remember seeing this mark?

Newspaper / Magazine	1
TV	2
Internet	3
On product packaging	4
On posters, fliers, banners, signs	5
Don't know / not sure	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? ***<u>Do not read out, more than one answer possible.</u>***

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

	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

<u>Ask All</u>

B4) Having read this statement, to what extent would it <u>now</u> 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

B4b) NEW Please tell me whether you agree or disagree with the following statements. ***<u>Read out statements one by one and code appropriately for each</u>***

	Agree	**Disagree**
I will ONLY buy or consider buying organic products if they are cheaper than non-organic products	1	2
I will ONLY buy or consider buying organic products if they are more or less the same price as non-organic products	1	2
I will buy or consider buying organic products EVEN IF they are slightly more expensive than non-organic products	1	2
I will buy or consider buying organic products EVEN IF they are significantly more expensive than non-organic products	1	2

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

(ALL DELETED AS NOT TO BE COVERED IN THIS YEAR'S SURVEY)

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			
RWANDA								
Radio Rwanda	59	59	Radio Maria	67	67	Flash FM	75	75
Radio Kigezi (from Uganda)	60	60	Radio Isanganiro	68	68	City Radio	76	76
Radio Free Africa (from Tanzania)	61	61	Community Radio Butare	69	69	Radio Izuba	77	77
Radio Kwizera	62	62	Community Radio Usizi	70	70	Radio Salus	78	78
Contact FM	63	63	Community Radio Gisenyi	71	71	Sana Radio	79	79
Radio Voix de Patriot	64	64	Radio 10	72	72	Radio Umucyo	80	80
Sango Star	65	65	BBC	73	73	DW (Deutsche Welle)	81	81
Voice of Africa	66	66	China International radio	74	74			
BURUNDI								
Voice of the revolution	82	82	Bonesha FM	85	85	African Public Radio (RPA)	88	88
Radio Isanganiro	83	83	Radio Kigezi (from Uganda)	86	86	Radio Free Africa (from Tanzania)	89	89
BBC	84	84	VOA	87	87	Radio France Internationale	90	90

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			
RWANDA								
TV Rwanda/Televiziyo y'u Rwanda (TVR)	01	01	Capital TV	10	10	Eurosport	19	19
Africable	02	02	Citizev TV	11	11	TV 5 Monde	20	20
MNET (any MNET station)	03	03	CNN International	12	12	Radio Televisiyo Nationale du Congo (RTNC)	21	21
Canal Horizons	04	04	BBC World News	13	13	Euronews	22	22
RTL9	05	05	DW-TV (Deutsche Welle TV)	14	14	VOA TV	23	23
East Africa TV (EATV)	06	06	MTV (Music Television)	15	15			
Uganda TV	07	07	France 24	16	16			
TV Burundi	08	08	Sky News	17	17			
MBC	09	09	Al Jazeera English	18	18			
BURUNDI								
Télévision Nationale du Burundi	01	01						

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	04	04	Daily Nation	06	06
The Monitor	02	02	Red Pepper	05	05	The Standard	07	07
The East African	03	03						
RWANDA								
The New Times	01	01	Rwanda Newsline	04	04	Focus	06	06
Imvaho Nshya	02	02	La Nouvelle Releve	05	05	Kinyamateka	07	07
Gasabo	03	03						
BURUNDI								
Le Renouveau du Burundi	01	01	Ubumwe	02	02	Burundi Chrétien	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? ***<u>Show card</u>*** *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		
RWANDA (RWF)					

Less than 37,500	01	300,001 – 375,000	06	675,001 – 750,000	11
37,501 – 75,000	02	375,001 – 450,000	07	Over 750,000	12
75,001 – 150,000	03	450,001 – 525,000	08	Refused	13
150,001 – 225,000	04	525,001 – 600,000	09	Don't Know	99
225,001 – 300,000	05	600,001 – 675,000	10		
BURUNDI (BIF)					
Less than 90,000	01	720,001 – 900,000	06	1,620,001 – 1,800,000	11
90,001 – 180,000	02	900,001 – 1,080,000	07	Over 1,800,000	12
180,001 – 360,000	03	1,080,001 – 1,260,000	08	Refused	13
360,001 – 540,000	04	1,260,001 – 1,440,000	09	Don't Know	99
540,001 – 720,000	05	1,440,001 – 1,620,000	10		

THANK RESPONDENT & CLOSE INTERVIEW

6.3. Annex 2: Key Informant Screener I

PROJECT: **Key Informant Screener**

1.1.1.1.1.1.1

NAME: (BLOCK CAPITALS, inc. initials)

Country: KENYA

TANZANIA

UGANDA

RWANDA

BURUNDI

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

1.1.1.1.1.1.1.1 Thank and close

Recruitment instruction:

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

Appointment date: -- Time: --

Location: -- --

6.4. *Annex 3: Key Informant Screener II*

PROJECT: **Key Informant Screener**

NAME: (BLOCK CAPITALS, inc. initials)

Country: KENYA

BUSINESS ADDRESS: -- TANZANIA

-- UGANDA

-- RWANDA

-- BURUNDI

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 well informed in types of food products or nutrition or dietary matters? **READ OUT**

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

Q3. What types of food products or foods are you fairly well informed about? **READ OUT**

Organic	1	**CONTINUE**
Non-organic	2	
Both	3	

Q.4. Who would be the person in this institution who is significantly informed on types of food products or nutrition or dietary matters? **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:

Hospital representatives: 2 per country for Kenya, Uganda, Tanzania and 1 per country for Rwanda and Burundi

University representatives: 2 per country for Kenya, Uganda, Tanzania and 1 per country for Rwanda and Burundi

Appointment date: -- Time: --

Location: -- --

6.5. *Annex 4: Discussion Guide I*

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 / purchasing food products which you then in turn sell to your customers? Why are these important?
- 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

- Would you at all advocate for consumption of organic products to your customers? Why / 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

6.6. *Annex 5: Discussion Guide II*

ORGANIC SURVEY

Key Informant Interview Guide with Hospitals and Universities

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 profession as relating to consumers preferences of food products?
  - → What are the pros and cons of these preferences?
  - → If you are to rank these preferences starting with the most common, how would you do it?

- What are the three main issues you think consumers should take into consideration when purchasing food products? Why are these important?
- 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 personal views on organic foods?
  - → Why?

- What types of foods do you as an individual/institution advocate for? Organic or non-organic? Why? Is this a deliberate decision? Why?

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

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

- How do people ensure that what they buy is organic? Please explain.

- How available are organic foods / products in the country? How affordable are they? How good is the quality? Why do you say so?

- What in your opinion would motivate consumers to buy organic foods / products or more of them?
    - → Explore motivations fully

- Would you at all advocate for consumption of organic products? Why / why not?

- What challenges do you face (or would restrain you) when advocating for consumption of 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 an institution 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 consumers identify organic products?
  Probe:
    - → Arranged on one shelf or a corner?
    - → Look for a logo?
    - → Read labels?
    - → Ask for guidance or assistance?
    - → Other?

- In your experience is this kind of identification optimal? To the best of your knowledge do consumers go further to ask any questions regarding the source, and the organic integrity of the products they buy?

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

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

6.7. Selecting and locating respondents

OVERVIEW

The survey will collect data from final consumers, representatives of hotels, restaurants, and greengrocers and supermarkets as well as from hospitals and universities. 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, supermarkets, hospitals and universities.

SAMPLING

Sample Selection Procedure

With exception of Rwanda and Burundi, we shall be going back to the same sampling points as previous wave.

For Rwanda and Burundi: 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.

For all countries:
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. The 1st house to be approached Interviews will be the 3rd household on the left hand-side of the random walk. The interviewer then will go house to house until a successful interview is got. After a successful interview, 2 households will be skipped.

Rwanda and Burundi:
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 18+ (NOTE THAT WE SHALL NOT INTERVIEW HOUSEHELPS AND GARDENERS). 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 2nd 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.

Sample breakdown for Rwanda and Burundi

Province	**Districts**		**No. of sampling pts.**	**Sectors**	**No. of interviews**
Kigali City					**50**
	Kicukiro		3	Gatenga	**8**
				Nyarugunga	**8**
				Niboye	**8**
	Gasabo		2		
				Kimironko	**8**
				Kinyinya	**8**
	Nyarugenge		1		
				Kimisagara	**10**

Province	Communes	No. of Urban interviews
Bujumbura Mairie	Bwiza	8
	Citiboke	8
	Kamenge	8
	Kinama	8
	Musaga	8
	Rohero	10
	Total	**50**

QUOTA SAMPLING YET RANDOM HOW

To ensure comparability of the data and findings, the structure of sample of the two waves MUST be a match in term of demographics of the respondents. Therefore a quota of the respondents from the past waves will be developed and interviewers will follow the random walk BUT at each household look for a respondent matching the demographics from wave 1.

The demographics will be based on

- Gender
- Age (bands of years)
- Socio economic class – by going to the same SPs as wave 1

The questionnaires will be pre-coded so that we have a sequence of respondent selection

For example:
After doing the random walk the interviewer knocks house number 1. He then enquires if there are any members in that household who fit the quota criteria he has. If yes he goes ahead and requests to be allowed to interview that person. In case there is more than one person who fits that quota in the same household the rotary method is used to select one. If no one in the household qualifies or there is a refusal, the interviewer goes house-to-house searching for a qualifying respondent. After a successful interview the interviewer skips 2 households.

The following are quotas for the 3 countries: note that this table needs to be pasted on the questionnaire indicating how many interviews will be done for the sampling points.

Kenya			**Female**						**Male**						
		Age bracket	**18-24**	**25-34**	**35-44**	**45-55**	**56+**		**18-24**	**25-34**	**35-44**	**45-55**	**56+**		**Total**
Division	**Location**	**Sub-location**													
CENTRAL	NGARA Loc	NGARA EAST	1	2	1	0	1		1	1	0	1	0		8
		NGARA WEST	2	1	1	1	0		1	1	1	0	0		8
MAKADARA	MAKONGENI	MAKONGENI	1	2	1	1	0		1	1	1	0	0		8
KASARANI	KARIOBANGI	KARIOBANGI NORTH	2	2	1	0	0		0	1	0	1	1		8
	KAHAWA	KONGO SOWETO	1	2	1	1	0		1	1	1	0	0		8
	RUARAKA Loc	MATHARE 4A S	2	2	1	0	0		1	1	1	0	0		8
EMBAKASI	EMBAKASI	MIHANG'O S	1	2	1	1	0		1	1	0	1	0		8
	UMOJA	UMOJA	1	2	1	0	1		1	1	1	0	0		8
	KAYOLE	KAYOLE	1	2	1	1	0		1	1	1	0	0		8
	DANDORA	DANDORA 'A' S	2	2	1	0	0		1	1	0	1	0		8
PUMWANI	EASTLEIGH SOUTH	CALIFORNIA	1	2	1	1	0		0	1	1	1	0		8
	BAHATI	UHURU	1	2	1	1	0		1	1	1	0	0		8
WESTLANDS	HIGHRIDGE	MUTHAIGA	1	2	1	1	0		1	1	1	0	0		8
	KANGEMI	MOUNTAIN VIEW	2	2	1	0	0		1	1	0	1	0		8
DAGORETTI	KAWANGWARE	GATINA	1	2	1	1	0		1	1	1	0	0		8
	RIRUTA	NGANDO	2	2	1	0	0		1	1	1	0	0		8
KIBERA	KIBERA	SILANGA	1	2	1	0	0		0	1	1	2	0		8
	MUGUMOINI	MUGUMOINI	1	2	1	1	0		1	1	1	0	0		8
	SERA NGOMBE	OLYMPIC	2	2	1	0	0		1	1	0	1	0		8
Mombasa															
ISLAND	TUDOR	TUDOR	2	2	1	0	1		1	1	0	0	0		8
KISAUNI	KISAUNI	KISAUNI	1	2	1	1	0		1	1	1	0	0		8
	KONGOWEA	KONGOWEA	2	2	1	0	0		1	1	1	0	0		8
LIKONI	LIKONI	BOFU	0	2	1	1	0		1	1	0	1	1		8
CHANGAMWE	PORT REITZ	PORT REITZ	1	2	1	1	0		0	2	1	0	0		8
	MIKINDANI	BIRIKANI	2	2	1	0	0		1	1	1	0	0		8
Total			**34**	**49**	**25**	**13**	**3**		**21**	**26**	**17**	**10**	**2**		**200**

Tanzania			**Female**						**Male**						
Region	**Districts**	**Sampling points/wards**	**18-24**	**25-34**	**35-44**	**45-55**	**56+**		**18-24**	**25-34**	**35-44**	**45-55**	**56+**		**Total**
Dar Es Salaam	**Kinondoni**	Magomeni	1	1	1	1	0		0	1	1	2	0		8
		Tandale	0	1	1	1	0		1	1	2	1	0		8
		Msasani	1	1	1	0	1		0	1	1	1	1		8
		Kigogo	0	1	1	1	0		0	2	2	1	0		8
		Manzese	1	1	0	1	0		1	1	2	1	0		8
		Kawe	0	1	1	1	0		0	2	1	1	1		8
		Makuburi	0	1	1	1	0		1	1	2	1	0		8
		Sinza	1	1	1	0	1		0	1	1	1	1		8
		Kimara	0	1	0	1	0		0	2	2	1	1		8
	Ilala	Ukonga	1	1	0	1	0		1	1	1	1	1		8
		Mchikichini	0	1	1	1	0		1	1	2	1	0		8
		Kipawa	1	2	1	0	0		0	1	2	1	0		8
		Jangwani	1	1	1	1	0		0	1	2	1	0		8
		Kiwalani	0	1	1	1	0		1	1	1	1	1		8
	Temeke	Mbagala	1	1	0	1	1		0	1	1	1	1		8
		Yombo Vituka	1	1	1	1	0		0	1	1	1	1		8
		Miburani	1	1	0	1	1		0	1	2	1	0		8
		Mtoni	0	1	1	1	0		1	1	1	2	0		8
		Azimio	1	1	1	0	1		0	1	1	2	0		8
		Sandali	0	1	1	1	0		0	2	1	2	0		8
		Mbagala Kuu	1	1	0	1	1		0	1	1	2	0		8
		Temeke	1	1	1	0	0		0	2	2	1	0		8
	Zanzibar	Mchangani	1	1	1	1	0		0	1	1	2	0		8
		Chumbuni	1	0	1	0	1		0	2	2	1	0		8
		Kwamtipura	1	1	0	0	0		1	2	1	2	0		8
	Total		**16**	**25**	**18**	**18**	**7**		**8**	**32**	**36**	**32**	**8**		**200**

			Female						Male						
Uganda			**18-24**	**25-34**	**35-44**	**45-55**	**56+**		**18-24**	**25-34**	**35-44**	**45-55**	**56+**		**Total**
Region	**Division**	**Parishes**													
Kampala	Central Division		4	6	2	1	1		4	7	4	2	1		32
	Nakawa Division														
		Bugolobi	1	1	1	1	0		0	1	1	1	1		8
		Naguru	1	2	0	0	0		1	2	1	1	0		8
		Mbuya upper	1	2	0	0	0		1	2	1	1	0		8
		Bukoto	1	1	1	0	1		1	1	1	1	0		8
	Makindye Division														
		Gaba	2	1	0	1	0		1	2	2	1	0		10
		Muyenga	1	2	1	0	1		2	2	1	0	0		10
		Buziga	1	2	1	1	1		2	2	1	0	0		11
		Kabalagala	1	2	1	0	0		1	2	1	1	1		10
	Rubaga Division														
		Rubaga	1	2	0	1	0		1	2	1	0	0		8
		Ndeeba	1	1	0	0	1		1	2	1	1	0		8
		Kabowa	1	1	1	0	0		1	2	1	0	1		8
		Namirembe	1	2	1	0	0		1	1	1	1	0		8
	Kawempe Division	32	4	6	2	1	1		4	7	4	2	1		32
Jinja	Buwenge + Buwenge T.C.	16	2	3	1	0	0		2	4	2	1	1		16
	Jinja Central	8	1	1	0	0	0		1	2	1	1	1		8
	Walukuba-Masese.	8	1	1	0	0	0		1	2	1	1	1		8
Total			**25**	**36**	**12**	**6**	**6**		**25**	**43**	**25**	**15**	**8**		**201**

6.8. 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 (Mechanics/Carpenters/Electricians/Drivers, e.t.c.)
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)
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