



CLEANER COOK STOVES & FUELS BCC PROJECT

Marketing plan Summary | 2016/2017



- This report summarizes outputs from a marketing planning workshop. It outlines;
 - Situation analysis;
 - Strategic priorities – what the project will address
 - Definition of the target audience, Insights and positioning statement
 - Marketing objectives
 - Marketing strategies (4ps)
 - Work plan

About the Project

- 2 year Behaviour Change Campaign funded by GACC
- Consortium lead is PS Kenya, an independent NGO specializing in social behavior change communication (SBCC) and social marketing. It is Kenya's largest social marketing organization and has 25 years' experience of developing and implementing large-scale SM & SBCC and campaigns.
- The Technical Partner is Practical Action Consulting (PAC), the dynamic consulting arm of the international NGO, Practical Action. Through technology, PAC enables poor communities to build on their skills and knowledge to produce sustainable and practical solutions.
- Synchronization of activities with the other Implementing Partner, MEDIAE, who is developing a TV Show – *Shamba Chef*

Overall project Objective

Help increase consumer **demand** for a range of higher-performing cook stoves and fuels, **improving lives**, **protecting the environment**, and **enabling manufacturers to meet the needs** of more and more households

Expected Project Outcomes

Impact: Save lives, improve livelihoods, empower women, and protect the environment



Outcome: Adoption (correct and consistent use) of clean and efficient cook stoves and fuels in households



Output 1:
Increased knowledge & awareness of benefits of higher tier cook stoves and fuels; options and where to access them

Output 2: Increased availability and access to higher tier clean cooking options

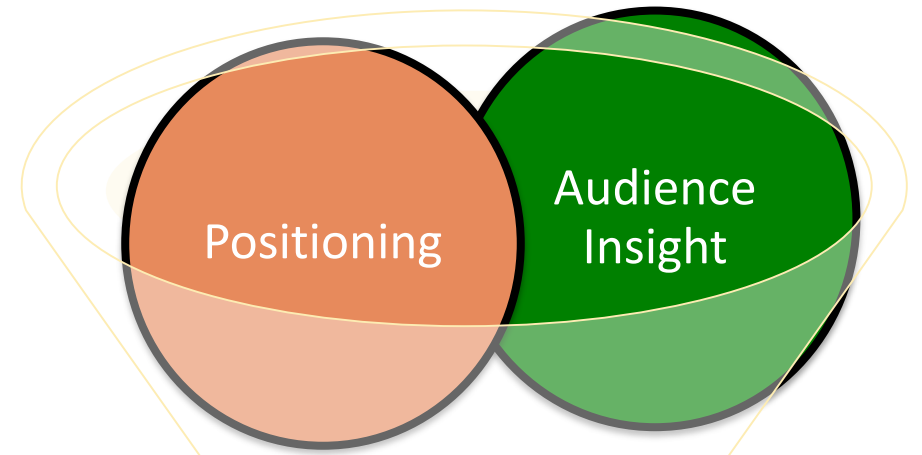
Output 3:
Strengthened documentation and sharing of cook stoves learnings

DELTA

PSI

**MARKETING
PLAN PROCESS**

Where Are We Now?



Where Are We going?

Marketing Objectives

How will we get there?

Product P

Price P

Place P

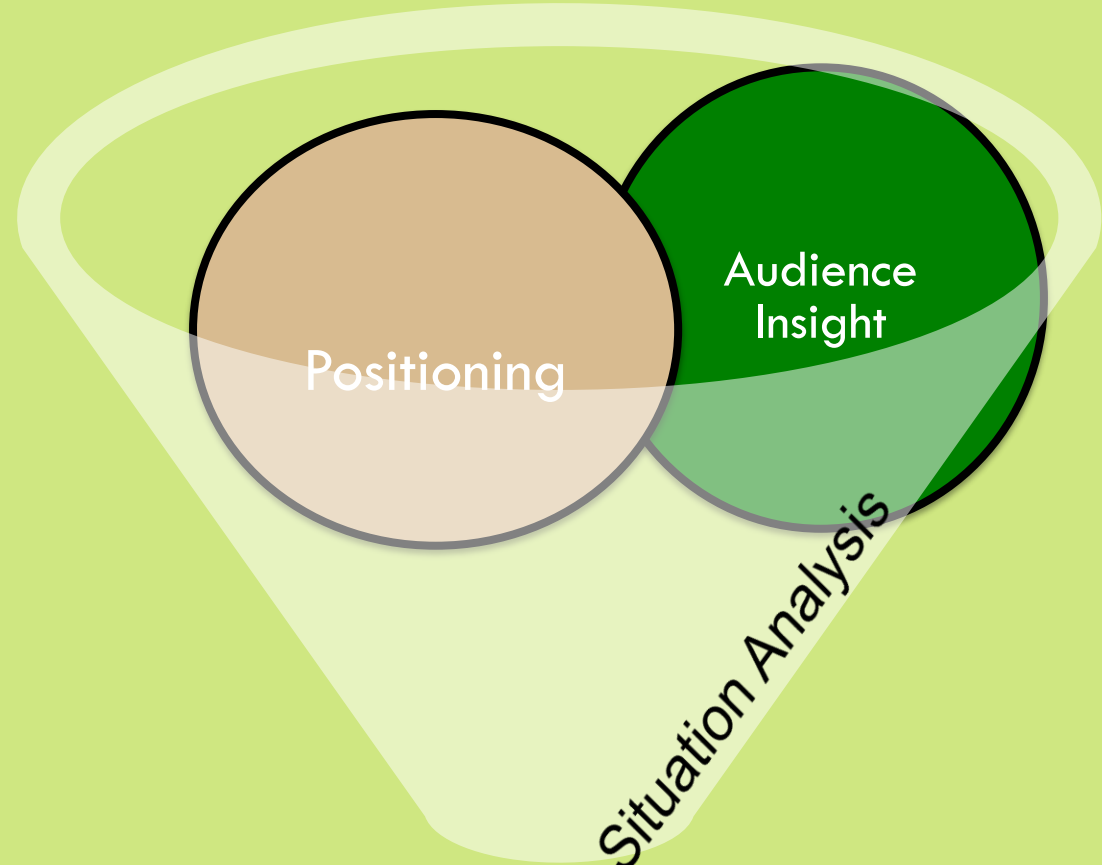
Promo P

How Are We doing?

Research Plan

Work Plan and Budget

Where Are We Now?



Positioning

Audience
Insight

Situation Analysis



Situation Analysis | The Problem

- **14.9 million Kenyans are exposed daily to high levels of household air pollution (HAP)** from using inefficient fuels with simple cook stoves.
- Acute Respiratory Illnesses (ARIs), attributable to HAP, are the second leading cause of death in the country; 14,000 deaths annually and over **40% of childhood deaths result from ARIs.**
- Household **emissions also contribute to the country's greenhouse gas emissions footprint** which currently stands at 0.2 metric tons per capita.
- Inefficient stoves and solid fuels places **economic burdens** on families; households purchasing fuels spend up to **30% of their income on fuels**
- **Time spent** collecting fuel or cooking for their families, means **less time** for women and girls to work in the paid economy or remain in school.

Source: GVEP, WHO, GACC

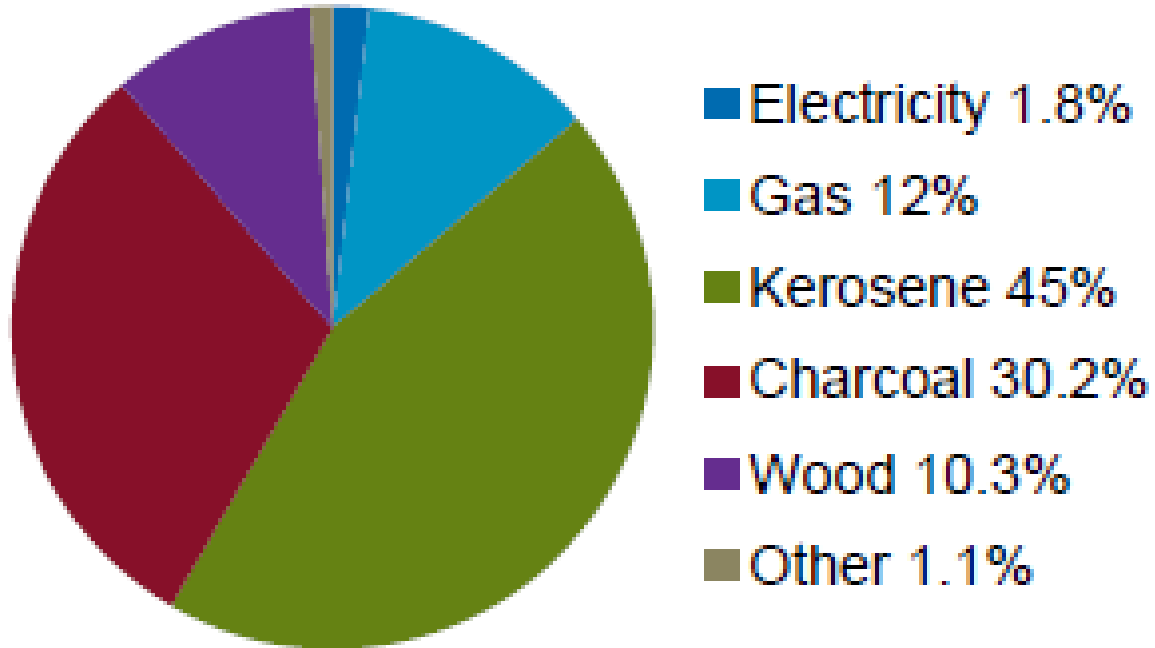


Situation Analysis | The Cook stove Sector

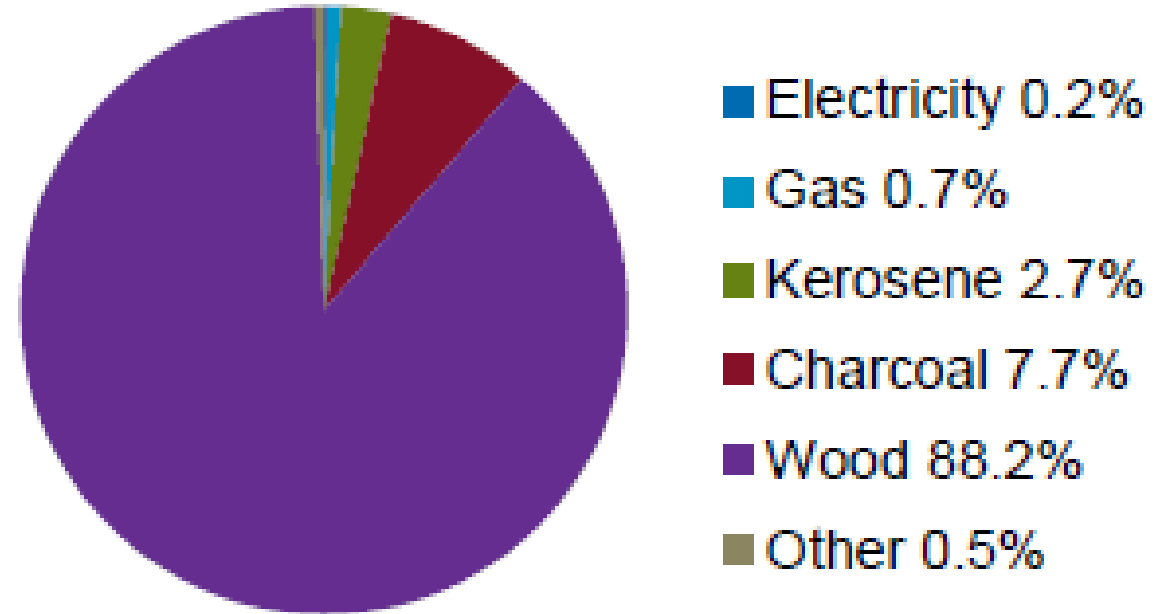
- Estimates of **penetration of improved cookstoves range between 30% and 40%** though no current, countrywide data on uptake exists.
- The bulk of manufacturing is artisanal in nature. The recent introduction of carbon financing has led to the entry of new and improved, mass marketed cook stove varieties.
- The main **supply bottlenecks are in distribution, marketing and sales**. For local, small scale manufacturing, quality is also a major problem.
- From a **demand perspective, availability, affordability and appropriate products** are the key concerns for consumers.

Situation Analysis | The risky behavior enhancing problem

- 68% of the country's total energy consumption is from biomass fuels.



**Fuels Used for Cooking Urban Areas
(UNDP/WHO 2009)**



**Fuels used for Cooking Rural Areas
(UNDP/WHO 2009)**

Situation Analysis | Segmentation

	Size	Segment profile	Segment challenges
Wood users	21.6 mil (55%)	<ul style="list-style-type: none"> • Predominantly lower income rural HHs • 99% rural, 1% urban 	<ul style="list-style-type: none"> • Lack of disposable income to move up energy ladder • Long collection times/biomass scarcity • High harm to health, but minimal awareness of it
Low income wood users	2.7 mil (7%)	<ul style="list-style-type: none"> • Low income (HHs under KES 10k/mth) • 89% rural, 11% urban 	<ul style="list-style-type: none"> • High fuel expenditures relative to income • Lack of awareness of harms • Modern energy is deemed unaffordable/inaccessible
Mid-high income wood users	2.9 mil (7%)	<ul style="list-style-type: none"> • Medium – High income (HHs above 10k/mth) • 90% rural, 10% urban 	<ul style="list-style-type: none"> • Lack of awareness of harm, but more sensitive to time burden of fuel-gathering/cooking • Modern energy is deemed inaccessible
Rural charcoal users	2.6 mil (7%)	<ul style="list-style-type: none"> • 11% low income, 73% middle income and 16% high income 	<ul style="list-style-type: none"> • Lower income still mostly relying on firewood (gathered or purchased)
Urban charcoal users	4.1mil (11%)	<ul style="list-style-type: none"> • 4% low income, 53% middle income, 43% high income 	<ul style="list-style-type: none"> • High premiums paid by low income (esp. in slums), and fuel consumes a very large income share • High share of income for mid-income urban buyers, but financially challenging to move up energy ladder
Kerosene users	2.1 mil (5%)	<ul style="list-style-type: none"> • 91% urban, 9% rural • 2% low income, 73% middle income and 25% high income 	<ul style="list-style-type: none"> • Adverse health effects, but minimal awareness given kerosene is seen as a “cleaner” fuel for those moving up the energy ladder
LPG users	2.2 mil (6%)	<ul style="list-style-type: none"> • 88% urban, 12% rural • 1% low income, 34% middle income and 65% high income 	<ul style="list-style-type: none"> • Low availability of LPG in rural areas • High relative cost of LPG fuel and equipment (cylinders/stoves) limit use to higher income HHs

Urban charcoal users emerged as best segment to target given current distribution and the segment's ability to purchase. The other segments would take a longer time to convert

Available cleaner cook stoves in the market

15%



EcoZoom
Jiko Bora
KES 4,500



Envirofit
Super Saver
KES 4,950

CHARCOAL STOVES

70%



BURN
Jikokoa
KES 3,990



EcoZoom
Jiko Fresh
KES 3,800

5-10%



BioLite
Homestove
KES 7,500

GASIFIER STOVES



Wisdom Stoves
Wisdom Stove
KES 3,500

5-10%



Consumer's Choice
Moto Safi
KES 2,200

ETHANOL STOVES



SAFI International
SAFI Stove
1-burner KES 3,600
2-burner KES 4,800

Situation Analysis | Key Issues

Key Issues

1. Awareness and knowledge is low – what is a clean cook stove and value
2. Health benefits not a major hook – cost (saving time & money), speed and aspiration (modernity)
3. Access is an issue – not available, don't know where to get it, complimentary product
4. WOM and endorsement favored – people they trust, the satisfied customer,
5. Scope of campaign – How narrow/wide should it be? Category, generic or brand specific???
6. Price and financing - is it a barrier??

Implications

1. Awareness: Customers need to know what a clean cook stove; How to identify it; Word of Mouth and endorsements are key
2. Value proposition: BCC campaign positioning should be hooked on economic benefits/aspirations. Health is secondary
3. Access – stove and fuels: Partner with multiple distributors to ensure availability; Customers need to be aware of where to go to get the stoves + support; leverage synergies
4. Scope of messaging:
Donor ask Generic (cook stoves, fuels and health impact)
Our proposal – clean cook stoves category (LPG, charcoal, gas, ethanol). Selection based on priority population, purchase power, availability
5. Pricing: to be addressed through value proposition

Situation Analysis | Strategic Priorities

Awareness

- Customers need to know what a clean cook stove is
 - How to identify it
- Word of Mouth and Product endorsements are key

Access – stove and fuels

- Product penetration is still low – 30% country wide
- Working with multiple manufacturers /distributors to map out and ensure availability
- Customers need to be aware of where to go to get the stoves + support
- Need to explore synergies with other players such as Equity Foundation and KUSCO to align demand creation and access

Pricing

- Even though TA have disposable income, they perceive the cost to be high
- Need for campaign to clearly communicate **value proposition** - hooked on economic benefits/aspirations/status. Health is secondary;

Meet Miriam, Wanjiku Akinyi

Audience
Insight

Positioning

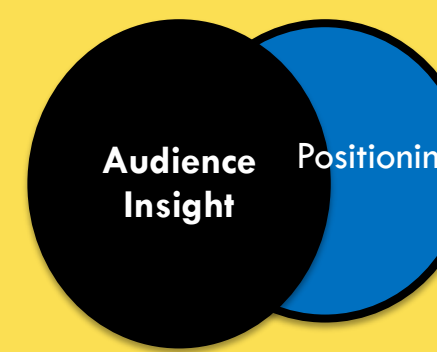


Demographics

- 30 yrs old
- Married; 2 school going kids
- Lives in outskirts of Nairobi in Kinoo, rented two bedroom
- Makes 15ks – 20ks selling second hand clothes
- Married to a taxi driver who makes 25- 30ks a month

Current behaviour

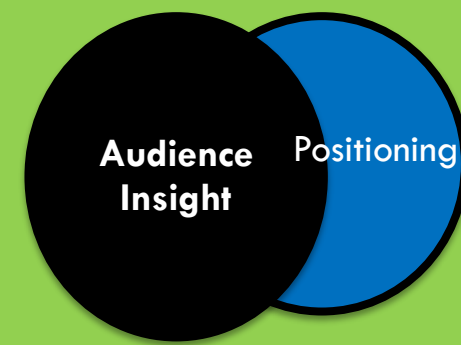
- Miriam usually cooks two meals a day: breakfast and dinner and she cooks them with a kerosene and the traditional charcoal stove respectively.
- She gets back home late and tired so she doesn't have time to make elaborate meals, she makes what is available and affordable.
- Her choice drivers for fuel and cook stoves are speed and convenience.
- She likes charcoal because once the Jiko is well lit the heat is intense and cooks fast, but on the flip side, it's a process to light up.
- She dislikes kerosene because of the smell and risk it brings to her home
- She knows of other fuels, but perceives them expensive and not worth it.



- *Her family is important to her and **her beliefs and values** are based on the **changing life trends** and they aspire to success in their endeavors to increasing disposable income and get a comfortable life with minimum responsibilities that require her time and attention.*
- *Her desire for a better life for her family is manifested in the kind of furniture and appliances she purchases; to increase her social status*
- *Miriam consumes media on her way to work, at work usually on radio, social media and OOH.*

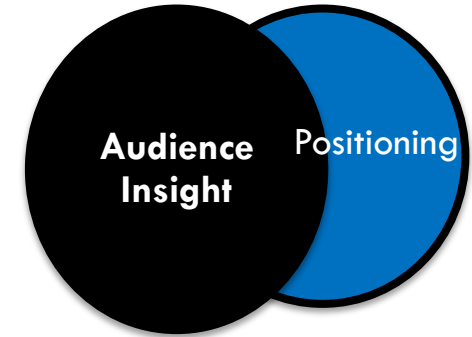
“All days are the same so there is no day I have more time from the time I wake up until the time I sleep I have things to do, so for me convenience is key. What frustrates me most is things that delay me because I need to go out do my business and make money”

What barriers will this campaign address?



Determinants

- 1. Access / Availability**
- 2. Knowledge / Motivation : Making it a priority**
- 3. Pricing/ Beliefs:** perceived expensive/ not for me.
Value proposition to Miriam (money save, status symbol, caring/responsible/loving etc)

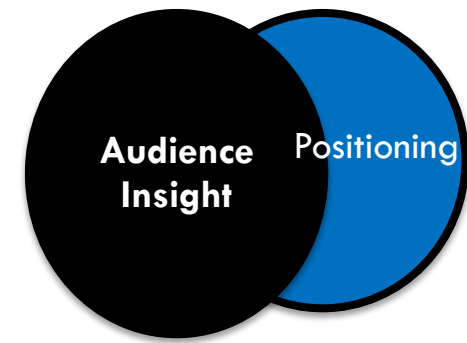


The Insight

Miriam feels like all days are the same – she is pressured for time from the time she wakes up to the time she sleeps so for her convenience is key. What frustrates her most is things that delay her because she needs to go out do her business and make money

Product offering

- 1. A lifestyle choice***
- 2. Cooking solution***
- 3. savings***
- 4. Status symbol***
- 5. Emancipation***
- 6. Speed/time savings***
- 7. An asset***
- 8. Cleanliness and hygiene***
- 9. A feeling of ease and relief***
- 10. An accessory***
- 11. More family time***



Brand Benefits

Functional benefits

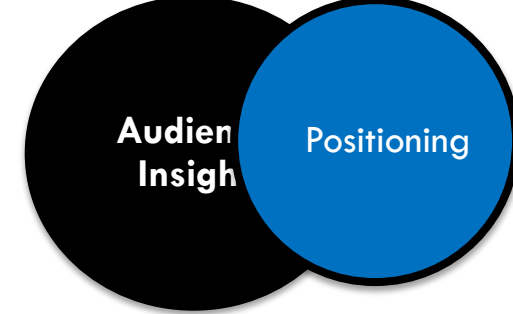
- Saves money and fuel
- Cooks faster
- Convenient to use
- Aspirational (Status symbol)
- Affordable (hopefully!)

Emotional benefits

- Pride and self confidence that comes with improvement and subsequently keeping up with the trends and technology

What the product makes her feel

- Proud
- Free
- Smart
- Cool
- Clean
- Stress free
- Control
- Demeaning
- Empowerment
- Dignified
- Providing a better life for family (good mother)



The brand promise...

- Owning an 'clean cook stove' is one more way to bring about convenience in her life, whilst providing an opportunity to save money and time for her to tend to her business / making a better life
- Improved cooking experience

Reason to believe the promise

- Are efficient in fuel and time; (less fuel and less time to cook)
- Product development is modern (attractive outlook, reduced smoke emissions and hassle free to light)

Barrier to believing the promise

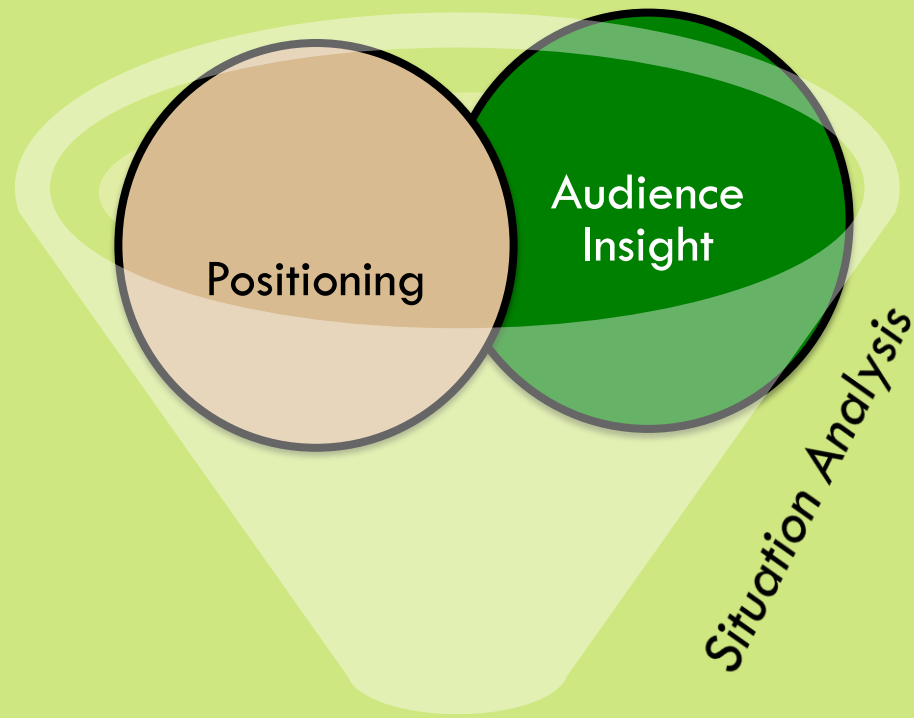
- She thinks the initial investment is not worth the value, and also questions the promised performance (less fuel for faster), driven by her limited knowledge of the product.

Positioning Statement

Audien
Insigh

Positioning

For Miriam using a Clean Cookstove saves
her money and **improves her life** / status
amongst her friends and family



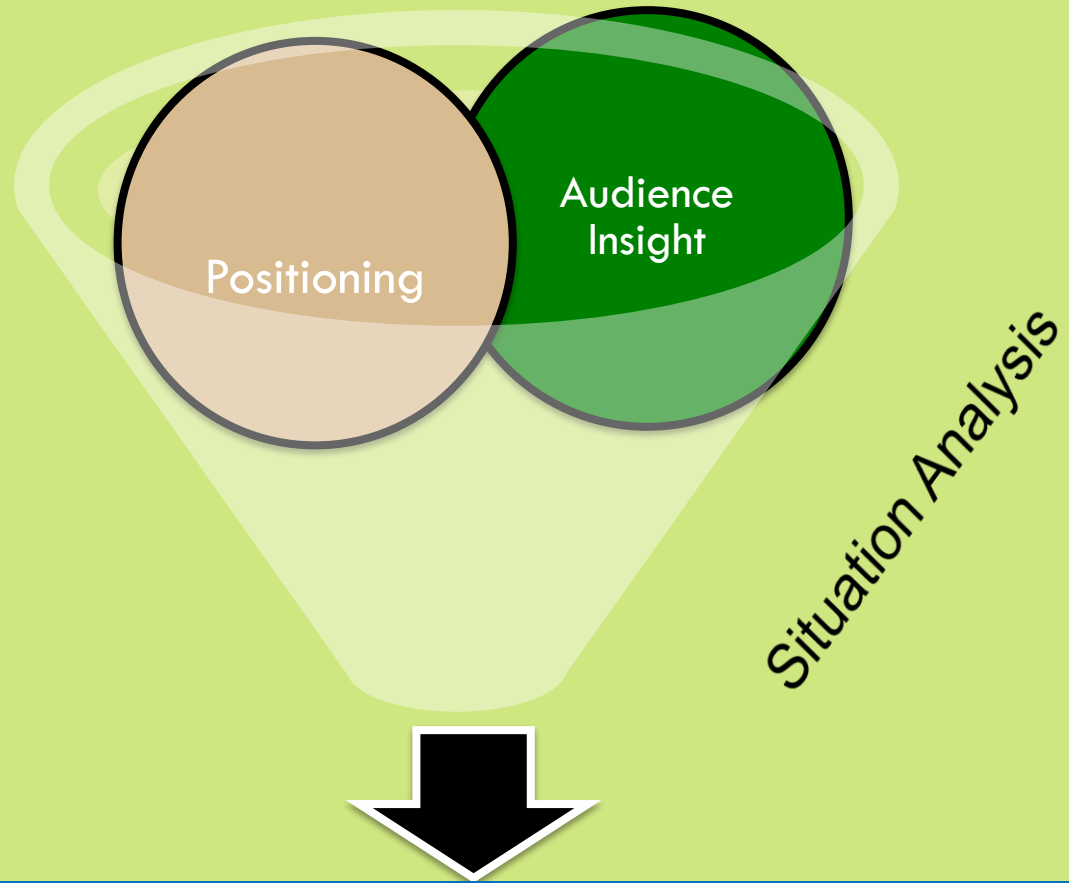
Where do we want to go?



Marketing Objectives

Marketing Objectives

1. Increase percentage of TA that can cite benefits of clean cookstoves and fuels
2. Increase percentage of TA that can cite **different** types of clean cookstoves & fuels
3. Increase percentage of -TA that know where to access a clean cookstove
4. Increase linkages with manufacturers and distributors
5. Increase percentage of TA adopting clean cookstoves and fuels



Marketing Objectives

Product P

Price P

Place P

Promo P

How do we get there?



Product / Behavior

Generic clean Cook stoves

- Branded campaign
- Educate on broad impacts & provide broad interventions of clean cooking
- Educate on wide range of solutions, benefits, and how to identify
- Emotionally bond target with the solutions

Category promotions

CHARCOAL STOVES

Jiko Bora
(EcoZoom)

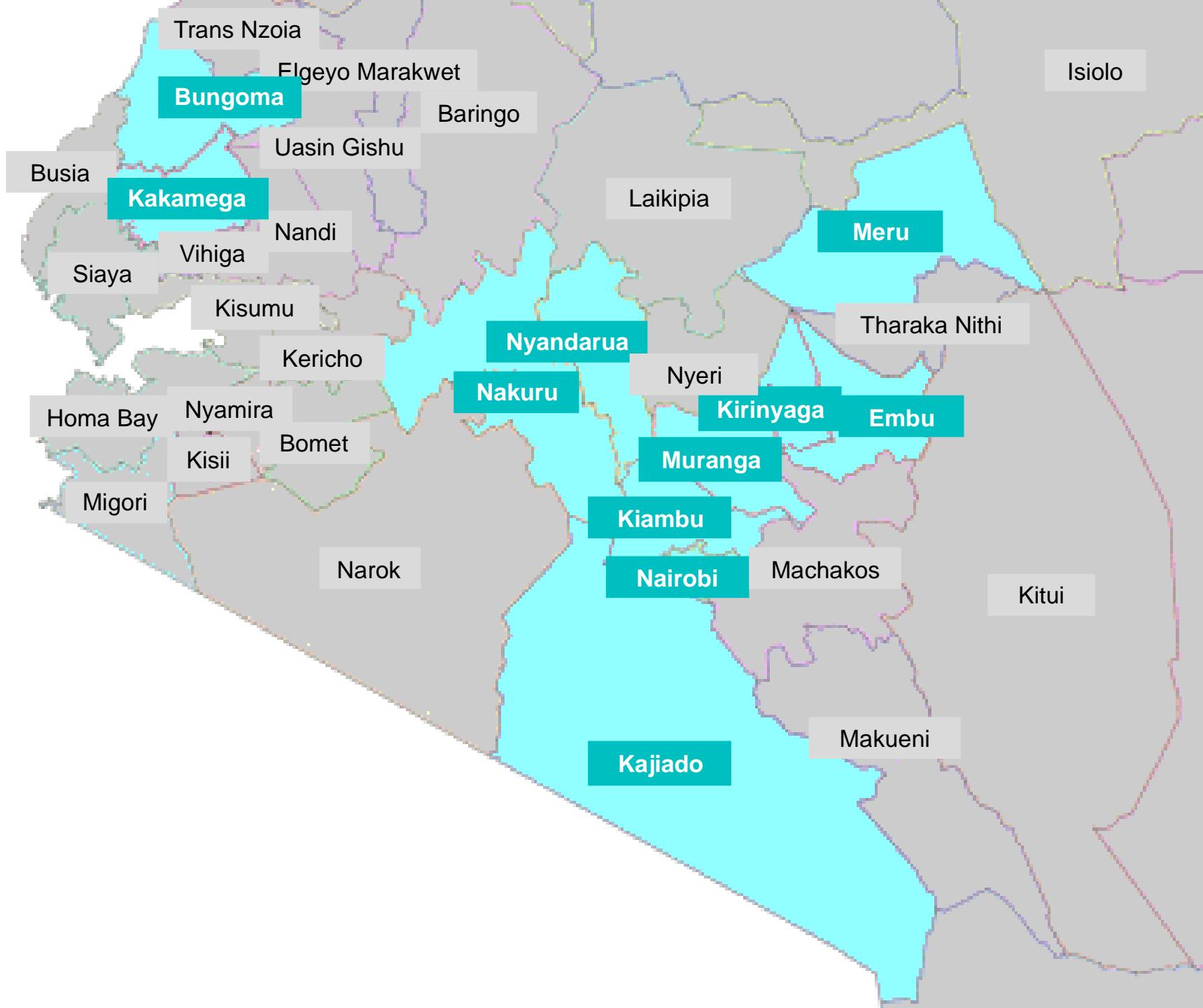


Jikokoa
(BURN Manufacturing)



SuperSaver
(Envirofit)





**Proposed
Intervention
regions**

What Value proposition are we offering

Functional benefits

- Saves money and fuel
- Cooks faster
- Convenient to use
- Safer to use
- Aspirational (Status symbol)
- Affordable (hopefully!)

Emotional benefits

- Pride and self confidence that comes with improvement and subsequently keeping up with the trends and technology
- Improves the entire cooking experience given the functional benefits

Place

Partner with a strategic partner / explore multiple distribution options

■ **Manufacturers**

- Mapping of their distribution by county (preference to piggyback on E.F)
- Create linkages through the PS Kenya CBOs

■ **CBOs**

- Demos
- Explore PS Kenya CBO as a last mile sales channel

■ **Financial Institutions (Equity foundation)**

- Demand Creation
- Linkage to last mile distribution

■ **Retail**

- Map retail outlets within implementation counties and communicate during IPC

Place: Distribution options

		SALES MODEL			e.g.
		Door-to-door	Small groups	Retail outlets	
TYPE OF DISTRIBUTOR	Financial organisations (sell on credit)				<i>Equity, Jihudi Kilimo, MEC, VEP, SACCOs</i>
	Distributors specialising in household durables				<i>iSmart, Living Goods, Give Watts, Pamoja Life, Klarisse, Arimathea, P&T, Human Needs</i>
	Supermarkets				<i>Naivas, Nakumatt, Tuskys, Clean Shelf</i>

Communication Objectives

1. Create awareness of cleaner cooking,
2. Educate about the broad impacts of the benefits (environmentally, health etc)
3. Educate on the types of clean cooking solutions, benefits and how to identify
4. Where I can access these cooking options

Promotion

Primary Messages

- I know where to get a clean cook stove somewhere easily accessible to me
- ABCD are the types of clean cook stoves
- I know that any stove that has X mark is a clean cook stove
- A clean cook stove is better than a non clean cook stove because
 - Savings: Fuel, time and money
 - Clean cook stove is the modern cooking method that offers you status
 - It improves the cooking experience

Secondary messages

- When I use a Clean cook stove my cooking environment is cleaner (reduced soot, ash and blackened walls)
- Using a clean cook stove reduces the number of trees cut down and air pollution
- Using a clean cook stove allows me to have more time for women and girls more time for school and other economic activities
- Using clean cook stoves provides a safer cooking environment for women and children
- Using clean cook stoves in the short term reduces health issues such as: running nose, sneezing, tearing, burns and in the long-term Acute Respiratory Infections

IPC Strategy

- Explore multiple IPC models

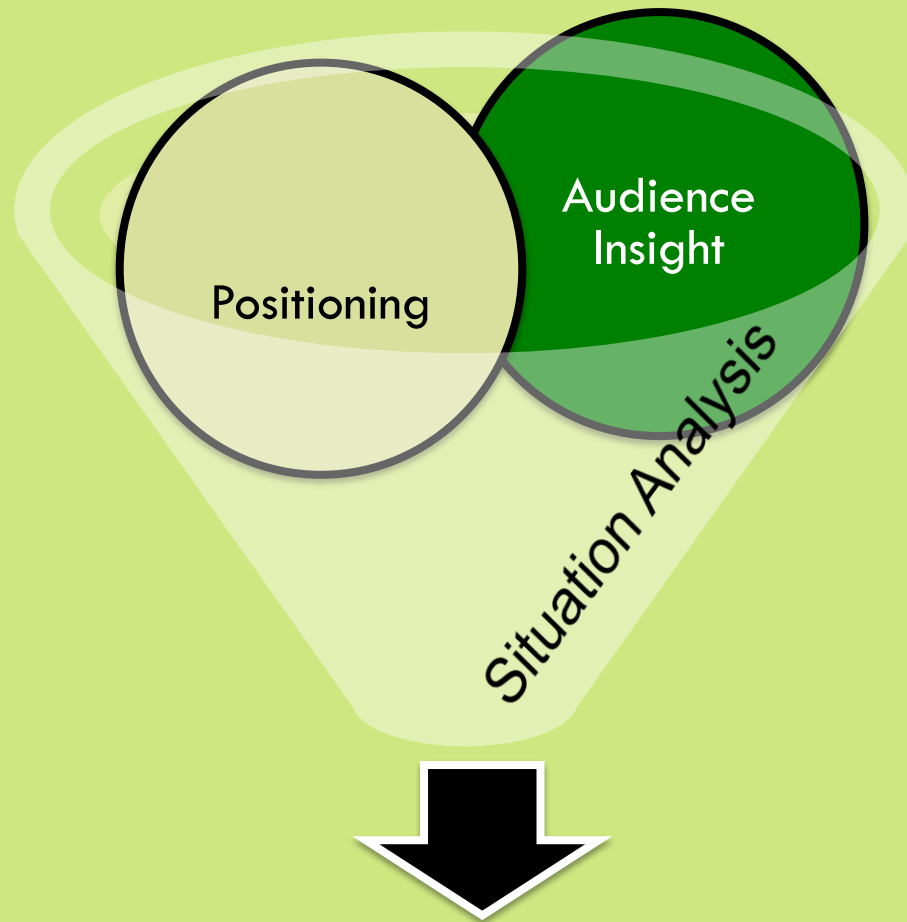
		IPC MODEL				Linkage to distribution
		Door-to-door	Small groups	Organized Groups	Market activation	
IPC Channel	CHVs					<i>Equity Agent, Retail outlet (supermarket), Manufacturer hotline</i>
	CBOs					<i>Equity Agent, Retail outlet (supermarket), Manufacturer hotline</i>
	Experiential Team					<i>Manufacturer hotline</i>

Longer format & with human interaction

	Radio Ads	Radio Talk Shows	BiL Print -Health centres --at retail -- etc.	Events	IPC --CBOs -Vendors	SM
Create Need & Educate		✓	✓	✓	✓	✓
Bond	✓		✓	✓	✓	✓

Shorter & simpler media

Time	Activity	Media consumed
5am	Wakes up	Vernacular / Local radio
6am	Commute to work	Classic FM, OOH
7-5pm	Work	Social media, WhatsApp Gossip, radio at work, vendors, marketers, chaama
7pm	Commute back home	Swahili radio, wall branding
8pm – 11pm		Papa Shirandula/ soaps / SM



How are we doing?

Thank you