



nielsen

INVESTIGATING THE DETERMINANTS OF COOKING FUEL CHOICE AMONG LOW INCOME HOUSEHOLDS IN LAGOS & ABUJA

— COMBINED REPORT —

FOR;

McCANN
GLOBAL HEALTH

REVISED: 19TH APRIL, 2017



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BACKGROUND INFORMATION

BACKGROUND TO THIS RESEARCH

- The Client ; Truth About Cooking Consortium (TAC) – led by McCann Global Health is in partnership with GACC (Global Alliance for Clean Cook stoves) to develop and implement a behaviour change communication campaign to increase household adoption of Liquefied petroleum gas cook stoves in Lagos and Abuja among women from the low income sector who live in Urban and peri-urban areas.
- A previously conducted research via primary and secondary sources unearthed initial insights that aided the establishment of a preliminary strategic framework, as well as uncovered a number of critical knowledge gaps that require further research .
- Research was therefore required to validate the initial insights and address the uncovered knowledge gaps.
- This document documents the findings from the study .

BROAD STUDY OBJECTIVES

Goals and aspirations
of both primary and
secondary audiences

Cooking fuel preference
as well as history of
cooking fuel use

Differences in Knowledge ,
attitudes and practices among
the target population 's use of
cooking fuel

Source of information and
influencers regarding big ticket
purchase, health, and cultural
trends

Determine top sources
of entertainment and
news.

Perceptions of LPG fuel
and cook stove

Key social
organizations and
events

Shopping preferences
and practices

Ascertain gender
differences in
purchasing power

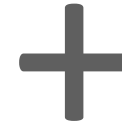
QUALITATIVE RESEARCH DESIGN (1)



**Focus Group
Discussions**



In- depth Interviews



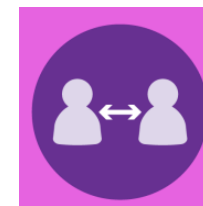
Ethnographic Observation



FGD – SAMPLE STRUCTURE

		AGE / SEC		
LOCATIONS				Total
		18 ears – 29 years	30 –45 years	
Lagos	Urban	F (C2)	M (DE)	2
	Semi – Urban (Ikorodu)	M (DE)	F (C2)	2
Abuja	Urban (Abuja Municipal)	M (C2)	F (DE)	2
	Semi –urban (Abaji)	F (DE)	M (C2)	2
TOTAL		4	4	8

Featured both current and lapsed users of biomass – (i.e. primary users of biomass and kerosene respectively) in a 50;50 split)



IDI SAMPLE STRUCTURE

LOCATIONS				Total
		Community / Gender leader	Religious leaders	
Lagos	Urban	1		2
	(Semi Urban) Ikorodu		1	
Abuja	Urban		1	2
	(Semi – Urban) Abaji	1		
TOTAL		2	2	4



ETHNOGRAPHIC OBSERVATION / SAMPLE STRUCTURE

AGE / SEC				
LOCATIONS		18 ears – 29 years	30 –45 years	Total
Lagos	Urban	F (C2) (Lapsed user of biomass)	-	1
	Semi urban (Ikorodu)	-	F (DE) (Current user of biomass)	1
Abuja	Urban (Abuja Municipal)	F (DE) (current user of biomass)	-	1
	Semi Urban (Abaji)		F (C2) Lapsed user of biomass)	1
TOTAL		2	2	4

QUANTITATIVE DESIGN



WHO

- Females 75% and Males (head of household) 25%
- Between 18 – 45 years in C2,DE neighborhoods
- Lapsed and current users of biomass for household cooking
- Live in urban / semi – urban areas.
- In language as preferred by the respondent



HOW

- Face to face interviews using structured questionnaire on electronic devices.
- All contacts were sourced by Nielsen.
- Interviews were conducted in respondents' homes
- Interview Length was about 50 minutes



WHEN

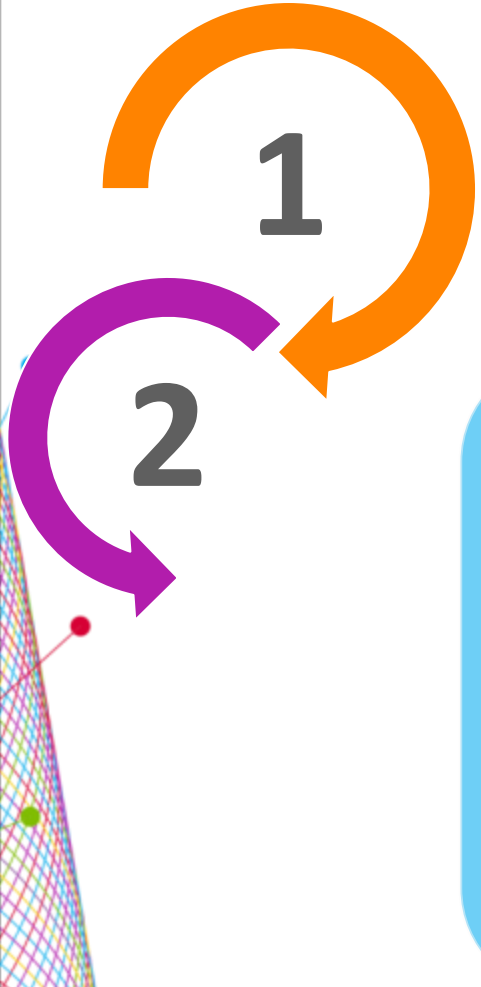
- Fieldwork was conducted between February – March, 2017

METHODOLOGY



- Face to face Computer Aided Personal Interviews (CAPI) will be conducted using a structured questionnaire at the participants' household
- The total interview length will be 60 minutes max

PRIMARY & SECONDARY TARGET RESPONDENTS (Random)

- 
- **Females 75% and Males (head of household) 25%**
 - Between 18 – 45 years in C2,DE neighborhoods
 - Lapsed and current users of biomass for household cooking
 - Live in urban / semi – urban areas.
 - Quota based purposive sampling will be used to get the category booster respondents.
 - In language as preferred by the respondent
- Random respondents will be selected to ensure a representative spread across the city
 - We will follow the Multi Stage Systematic Random Sampling route
 - Starting Points (SPs) to be selected for each city based on sample size and contacting 6 households around each SP
 - To select SPs, the city/town will be divided into streets/ blocks and numbered in alphabetical order
 - Interviewer to walk on the right side and knock on the 1st household on his right hand side- thus we will follow the Right Hand Rule (RHR)
 - Every 3rd Household to be contacted- after a successful interview
 - In each household, the eligible male or female to be interviewed

SAMPLE STRUCTURE- QUANTITATIVE

- **SAMPLE SIZE : 600** (Random Sample Size n = 400, Booster target respondents n = 200)
- **USERSHIP:**
 - (1) Lapsed users : either switched from Biomass to Stove or Stove to Biomass in the Past 1 Year
 - (2) Current users of biomass for household cooking i.e. been using biomass consistently for the past 2 years
 - (3) LPG user : currently uses LPG mainly for cooking. May or may not own Biomass/Kerosene

	RANDOM Urban 35%/ Semi Urban 65%	BOOSTER (MINIMUM QUOTAS)		
		CURRENT USERS	LAPSED USERS	LPG users
Lagos	250	40	30	30
Abuja	150	40	30	30
Total	400	80	60	60

- FACE-TO-FACE INTERVIEWS WILL BE CONDUCTED DOOR-TO-DOOR USING A STRUCTURED QUESTIONNAIRE
- INTERVIEWER ADMINISTERED SURVEY USING CAPI (COMPUTER ASSISTED PERSONAL INTERVIEWS)
- APPROX. 60 MINUTES INTERVIEW

SAMPLE STRUCTURE – QUANTITATIVE

Break down of LGAs & Sample Split

	Lagos		Abuja	
Urban	LGAs	Quota	LGAs	Quota
	Kosofe	24	Gwagwalada	29
	Mushin	24	Kuje	29
	Amuwo - Odofin	24	Abuja Municipal	30
	Lagos Island	24	-	-
	Surulere	27	-	-
Semi – Urban	Ikorodu	77	Kwali	54
	Badagry	75	Abaji	54
	Epe	75	Bwari	54
Total		350		250

SAMPLE SPLIT - QUANTITATIVE

A total sample size of 600 was planned to be achieved with the sample split as seen below...

LOCATION

	Proposed	Achieved
Lagos	350	359
Abuja	250	256
TOTAL	600	618

DATA COLLECTION

	Proposed	Achieved
Random	400	616
Booster	200	2
TOTAL	618	618

LANGUAGE OF INTERVIEW

English Language	554
Pidgin English	9
Hausa Language	1
Yoruba language	53
TOTAL	618

URBANIZATION

	Proposed	Achieved
Urban	123	210
Semi-Urban	227	404
TOTAL	600	618

SEC

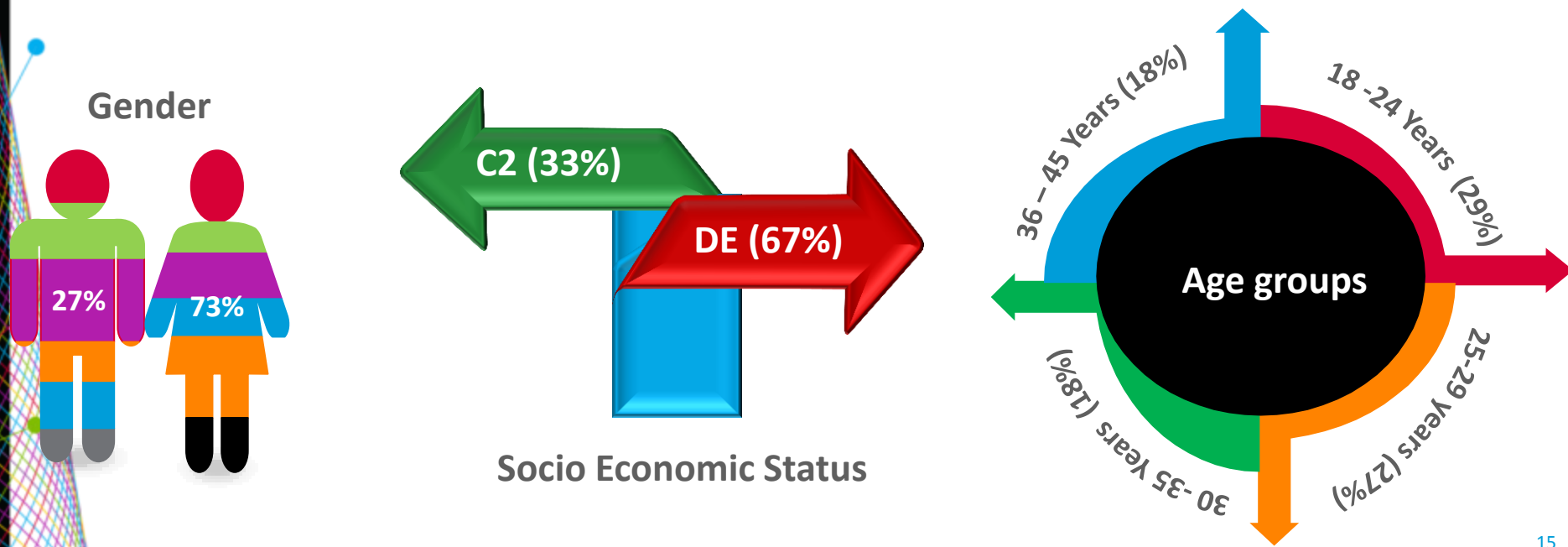
	Proposed	Achieved
C2	NA	204
DE	NA	414
TOTAL		618

GENDER

	Proposed	Achieved
Female	450	451
Male	150	168
TOTAL	600	618

BACKGROUND CHARACTERISTICS OF SURVEY RESPONDENTS (QUANTITATIVE)

- ❖ The participants comprised individuals aged between 18 and 45 years who live within the urban and semi-urban areas in Lagos and Abuja and who primarily depend on nonelectrical sources of power for cooking purposes.
- ❖ By design, there was a skew to the female gender (73%) against male (27%). This was done to ensure that the survey captured the different perspectives and actual cooking habits and behavior presented by users of fuels, purchasers of fuels and heads of households.
- ❖ There are limited demographic information to indicate the socio economic status of households in the both survey locations and the local fuels market. The output of the Socio economic classifications for the survey was thus based on the sampling approach and key classification/measurement parameters used in the survey.
- ❖ 56% of respondents were under the age of 30, which, as an effect of the random sample, might well reflect the actual demographics of the population base of Lagos and Abuja.





EXECUTIVE SUMMARY & RECOMMENDATION

EXECUTIVE SUMMARY & RECOMMENDATION (1)

Demographics- Goals and Aspirations of primary & secondary audience

Urban Migration is quite a common phenomenon in Nigeria. Most people in search of greener pasture migrate to urban centers and have over time remained in the urban centers for survival and sustainability. These habit is driven mainly by the opportunities available I the cities as well as lifestyle aspirations and goals of common Nigerians.

The breakdown on occupation of head of household shows that employment is very high with some 33% indicating that they are professional and managers. 45% of households recorded a monthly spend of N30,000 – N50,000. Every average Nigerian aspire to be reach and be well known for different fields and talents as shown by key Icons/mentors and role models.

In driving communications around LPG Uptake, it will be important to consider using icons/public figures they can identify with as well as align with their goals and aspirations.

Knowledge, Attitude & Practice on Cooking:

Despite the hassling in the city, people still find time to cook. Cooking is done quite often (77%) of the respondents claim to cook every day of the week and (43%) cook at least twice in a day while 28% cook up to three times in a day on average.

On cooking time, (54%) cook for about 30mins to 1hour, while another 26% claim to cook for more than one hour per cooking occasion. This trend shows high cooking fuel consumption irrespective of the fuel method used. Some people while cooking engage in several non-cooking activities such as; house chores (65%), Watching TV, movies and listening to music/radio (22%), reading (10%) and other activities at lower mention. This could be driven by long length of time they spent while cooking as earlier stated.

The communication message in favor of LPG should be leveraged on high consumption given the cooking habits of the people.

EXECUTIVE SUMMARY & RECOMMENDATION (2)ⁿ

Cooking Fuel preference:

Health is wealth as ascribed by most respondents. Several concerns were expressed about all cooking fuel method. Biomass received the highest number of concerns ranging from **Concerns of Environmental Pollution, Health Issues** attributed to smoke and heat generated, **Aesthetic concerns, Concerns on Physical inconvenience** of bending down, **social concern** of conveying a lower and degrading status.

The communication around LPG should be centered on the benefits and possibility of reducing to barest minimum some of these concerns enumerated.

Source of information and influencers regarding big ticket purchase, health, and cultural trends

Finance is essential to the survival for the people. The habit of saving money is still in practice, but amount saved is now lower – compared with the past - due to the current economic hardship. 75% of the respondents recorded that they save. 82% of those who save, save with commercial banks. 17% save with savings collectors like alajo, adako, akawo etc. while 14% save at home.

The motivation to save money is primarily to take care of; Emergencies / unforeseen circumstance e.g. hospital bills etc., to financially support spouse in time of need (females mainly) and to re - invest in business / mitigate risk of business (business owners).

Male spouses influence purchase decision and are responsible for the high value purchases of the house hold. In this light, LPG stoves may not be an exception if it is decided to be bought. Men seem to be the ones that make expenses on fuel purchases for household while women make more purchases on food items.

The communication around LPG should have content that will drive the message to the men as well as women.

EXECUTIVE SUMMARY & RECOMMENDATION (3)ⁿ

Perception of LPG fuel & Cook Stove:

Incidence of switching from one cooking fuel method to another is quite high and driven by some of the factors already discussed earlier. The high points of Biomass lie mostly on its economic value. It is affordable and good for cooking large quantity of food. Perceptions of LPG as a fuel, on the positive side, were: “a clean and fast cooking source of energy” and “Ease of use” were top mention among others.

Users of LPG use it on a daily basis. Overall, 5kg, 6kg and 12.5kg are the popularly used sizes. On prices for refilling the gas cylinders, 12.5kg on average is sold for N4,800. 6kg is sold for N2,585 and 5kg is sold for N2,018.

Almost same number of people that buy from neighborhood gas shops (44%) also buy from petrol stations (42%). And 71% expressed ease of availability at these purchase location.

Major barrier to adoption of LPG is hinged affordability (cost and value). The second issue is safety issues. Likelihood of LPG uptake is quite high. 68% (on top 2 boxes) of the respondents said they were likely or very likely to do so! This is a good indication of favorable disposition towards LPG usage.

It is important that when designing communication around LPG, availability and safety of purchase points should be considered. More so, the price range of various LPG cook stove sizes should be well specified for clarity. The length of time each LPG cook stove is expected to last should be included to dispel fears around finishing time, value and cost.

EXECUTIVE SUMMARY & RECOMMENDATION (4)ⁿ

Media Channel Usage and Presence:

The **internet** is the most popular primary source of information / entertainment. Usually **accessed through their mobile smart phones** - considered a personal 'on – the – go' device. It is assessed daily anywhere at any time. Keeps them abreast with information from all over the world. Affordability of data (due to free data bonus given upon recharge of air time – at least 100%) has greatly enabled this.

Word of mouth is the major source of receiving cooking information.

However, on preferred channel for receiving regarding cooking, Respondents are suggesting:
Online/internet assessed using mobile phone (49%), TV (43%), Word of Mouth (38%), Radio (25%)

When delivering communication on LPG, the suggested media should be adopted for efficient information dissemination.

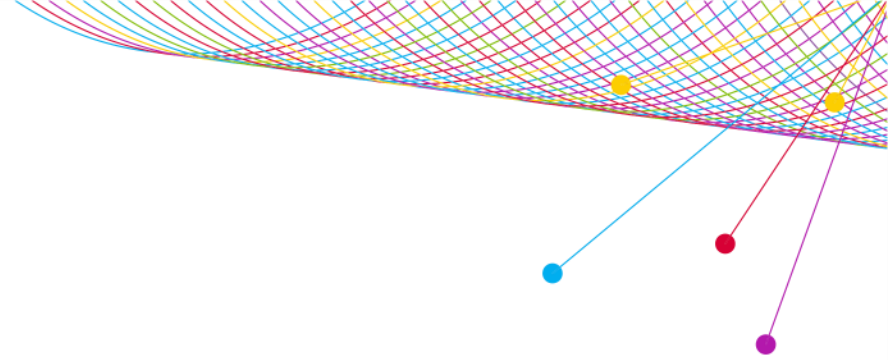
Key Organizations & events:

Community Youth Associations wield strong influence within communities in urban locations. However, the majority of the general populace interacted with belong to groups in their places of worship – church mainly- such as men's group, women's group, youth group, young female group, singing group etc

Few belong to the following; **Ethnic / tribal social groups**, **Local professional associations / bodies** and **Independent social groups** organized by individuals

Since the communication for LPG will not be primarily targeted at youth, associations will not play a key role in driving the message. The only association/key organization for the targeted market will be church/religious based organization.

DETAILED FINDINGS



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.....

SECTION 1 ;

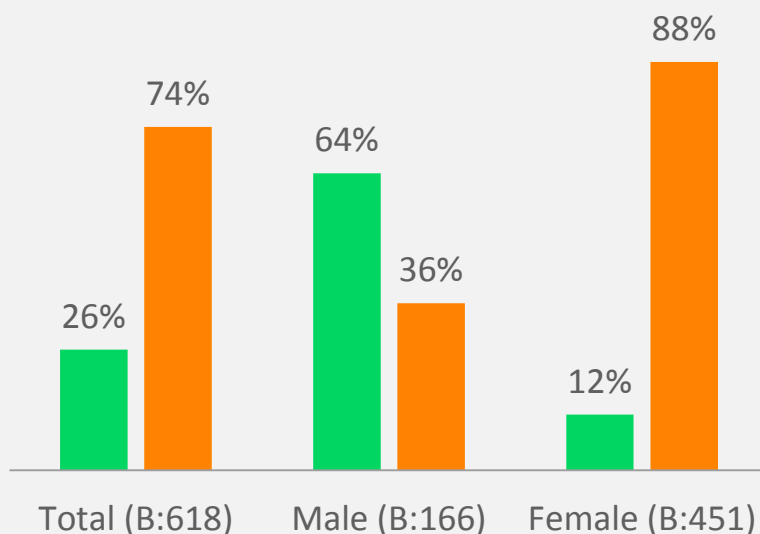
CITY DWELLING / HOUSEHOLD CHARACTERISTICS

• HEAD OF HOUSEHOLDS & CHILDREN IN THE HOUSEHOLD

- ❖ Overall, 26% of the respondents interviewed were the head of households. Among them were more of Males (64%) and only 12% female head of households.
- ❖ For the children in the households, majority of the households claimed not to have children within the age of 0 – 17years in their households. However for the households with one of two children, there are more male children than female.

Are you the head of household?

■ Yes ■ No



FEMALE

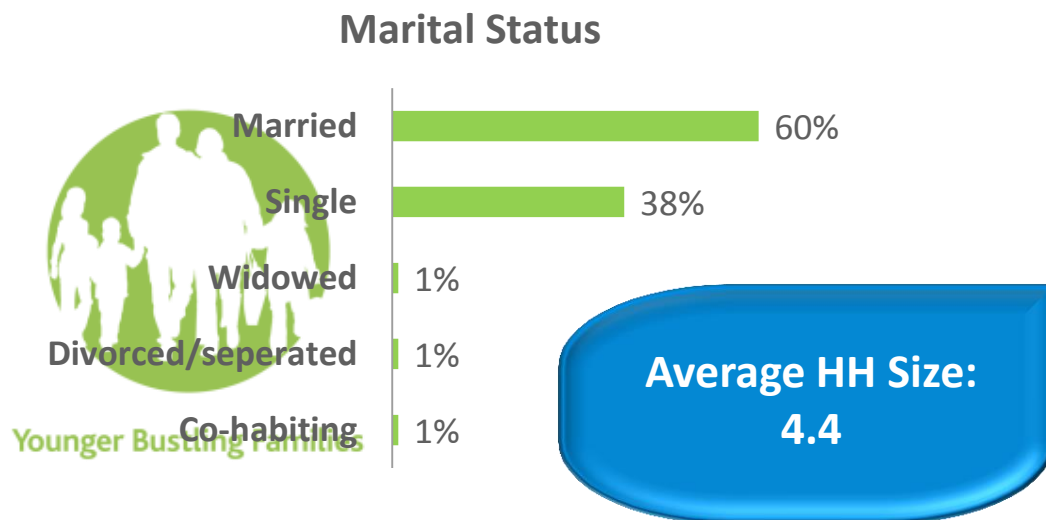
	Teens 13 to 17	Children 10 to 12	Children 6 to 9	Children under 6
	%	%	%	%
None	85	89	83	74
One	12	10	14	21
Two	3	2	2	5
Three	0	0	0	1

MALE

	Teens 13 to 17	Children 10 to 12	Children 6 to 9	Children under 6
	%	%	%	%
None	85	84	80	71
One	13	14	17	23
Two	3	2	3	5

Q: Are you the head of household?....How many children in these age group live in your household?...MALE and FEMALE?

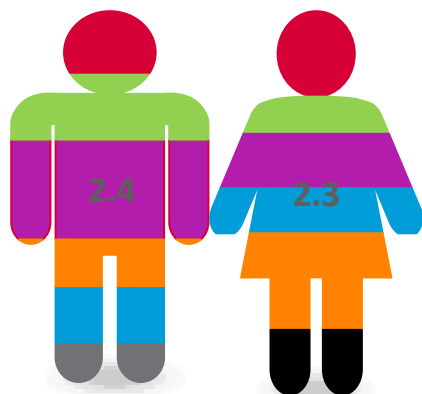
- **MARITAL STATUS & SIZE OF HOUSEHOLDS**



- ❖ The information on marital status of the respondents indicates that over half the respondents were married (60%) while 38% were single.

- ❖ The average number of people living in each household was 4.4, this doesn't reflect the official household size of 5.5 according to National Population Commission.

Average of each Gender in the HH



- ❖ There is almost equal split of gender composition of household members. On average, male (2.4) and female (2.3).

Q: What is your marital status...How many people live in this household?

Q: Of all the people that live in this household, how many are girls? And how many are boys?

WILLINGNESS TO STAY IN THE CITY

The quest for survival (*available opportunities*) is the main motivation to remain in the current locations the target audience reside in .

Several factors account for the shift to the urban / semi urban locations. They are mainly:

- Availability of better opportunities to enhance vocation / business / education to achieve a higher living standard and ultimately social exposure.
- Better / higher security (absence of crisis caused by terrorism / kidnapping / ritual killing etc.)
- Family reunion: moving closer to the husband living in the city.

“

Life in the city has really impacted me, I am able to attend professional program which I wouldn't have had the opportunity of doing in the village. After graduation – having studied computer science, I will not have been able to acquire what I have. I would have been a farmer or Agbero (tout)

URBAN MALE, Lagos
30-45 years old, D.E

“

In the village, you see same set of people every day, but in the city, you meet different persons every day, you get more exposure

URBAN MALE, Lagos
30-45 years old, D.E

”

”

GOALS AND ASPIRATIONS

Generally, key goal / aspiration is to achieve **financial stability** via **having a better job, business expansion, being their own boss / become self employed**. This is not surprising as respondents were all low income earners.

The drive / passion to become **financially comfortable** is very strong and there appears to be a very strong 'entrepreneurial' spirit possessed by the target audience that gives them a mind set to work hard with **focus, determination and discipline, coupled with prayer** while **saving/preparing towards achieving their aspirations**.



VERBATIMS - GOALS AND ASPIRATIONS

“

“In the next 5 years I want to have my children to have finished school and further their education ”

Females, 30 – 45 years , DE. Urban, Abuja.

“ I see myself going higher in my business , in my career , in my life, my family expanding, and then more importantly teaching others to know how to live right - to be exposed. As well, going back to my roots , put more light in what they are doing, those things that they don't know , I will like to ... may be by the grace of God build a school , a big school that will expose them, and help them meet up with the city life (Life in the city)”

Males, 30 – 45 years, DE, Urban , Lagos

“Like now I am a mechanic, I told you earlier, so now I'm planning to go to Germany in the next 5years and bring cars, customized cars to sell “

Males, 18 – 29 years , DE, Semi – Urban, Lagos

“Five years to come, what I do have in mind now is to just finish my graduation and the next thing to have a wife and have a Job “

Males, 30 – 45 years, C2, Semi – Urban, Abuja

“ n the next 10 years, am going back to my village, set up a business on charcoal, so from there I will be taking it to Lagos and Abuja ...The charcoal business is a lucrative business , I have people that they are into it and is making big money and all those Chinese companies they use it, so in the next 10 years , I will go back to the village and set up the business. ”

Males, 30 – 45 years, DE, Urban , Lagos

”

WAYS OF ACHIEVING ASPIRATIONS

HOW WE CAN ACHIEVE IT

- Eating & living healthy to stay fit and capable
- Being focused/determined in business pursuits & delivering quality service to keep them in business
- Further education - in order to get better opportunities
- Discipline & Planning: keeping money aside for major projects like building own home apartment or buying a car
- Strong religious affiliations / prayer
- Educating the children / give them good quality education - for better life opportunities
- Always improving on skill set to be found innovative thus remaining relevant in business



Yes I'm doing contribution (saving money).

Like me my goal I put more emphases on education because no matter how it is if you are not very educated, there are some things you will not qualify for...

Females, 18 – 29 years, DE, Semi – Urban, Abuja

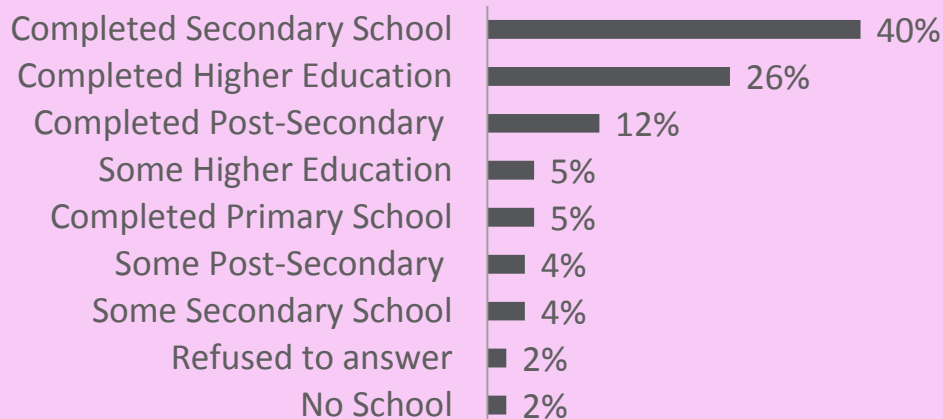
Yes you pray for God direction because if God direct you , may be you want your business to increase , pray that God should direct you, so if God direct you , you will know how to work toward it

Females, 30 – 45 years , DE, Urban, Abuja



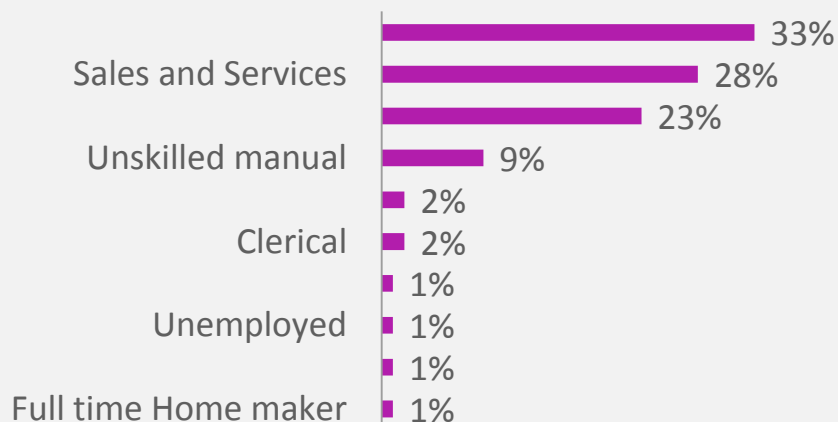
• EDUCATION & EMPLOYMENT OF HEAD OF HOUSEHOLDS

Educational Qualification



- ❖ 40% of the head of households completed secondary education. 26% of them completed higher education (university or polytechnic).

Occupation/Employment



- ❖ The breakdown on occupation of head of household shows that employment is very high with some 33% indicating that they are professional and managers.
- ❖ For Students, housewives and unemployed respondents, the corresponding figure is lower at 3% all together.

Q: What level of formal education did the head of household attain?

Q: what is the current occupation of the head of household?

• EDUCATIONAL QUALIFICATION OF RESPONDENTS BY DEMOGRAPHICS

- ❖ Overall, nearly half the respondents have completed secondary school.
- ❖ 5% more males than females have completed post and higher education especially in Abuja. This shows that the males have attained higher educational qualification than females.

	Total	Male	Female	Lagos	Abuja	Urban	Semi-Urban
Base	618	166	451	359	256	210	404
	%	%	%	%	%	%	%
Completed Secondary School	49	46	51	54	43	50	49
Completed Post-Secondary	19	22	18	17	22	21	19
Completed Higher Education	10	13	8	8	13	15	7
Some Secondary School	6	4	6	9	2	4	7
Completed Primary School	5	1	7	6	5	4	6
Some Post-Secondary	5	8	4	3	8	2	7
Some Higher Education	4	6	4	3	7	5	4
Some Primary School	1	0	1	1	1	0	1
No School	0	0	1	1	0	0	1

Q: What level of formal education have you completed?

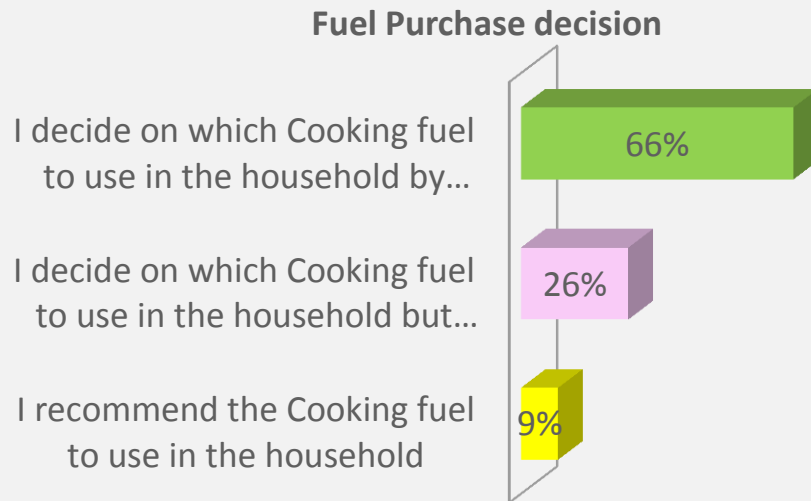
• EMPLOYMENT STATUS OF RESPONDENTS BY DEMOGRAPHICS

- ❖ While more males engage in skilled labor, the females are more into sales and services.
- ❖ Female full time homemakers reside more in Abuja than Lagos.

	Total	Male	Female	Lagos	Abuja	Urban	Semi-Urban
Base	618	166	451	359	256	210	404
	%	%	%	%	%	%	%
Sales and Services	31	14	37	36	23	30	31
Skilled manual	20	34	15	25	13	20	20
Student	12	16	11	10	16	14	12
Full time Home maker	11	1	15	7	17	8	13
Professional/Technical/managerial	10	13	9	7	14	11	9
Unemployed	6	6	7	4	10	8	5
Unskilled manual	6	7	5	7	3	6	5
Clerical	4	8	2	4	4	2	5

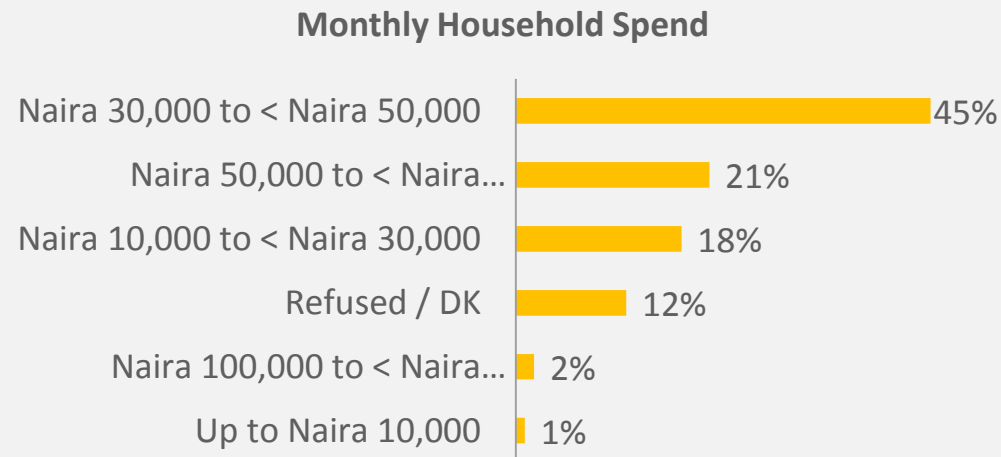
Q: what is your current occupation ?

FUEL PURCHASE DECISION & HOUSEHOLD SPEND



- ❖ We carefully selected survey participants with these purchase decision capabilities. The rationale for selecting the above groups was based on their ability to provide useful insights about how these people make fuel choices, what fuels they use, factors that influence their choices and how they value different types of fuel.

- ❖ 66% of the survey participants decide on cooking fuel type used in the households.



- ❖ There are limited demographic and other data to indicate the purchasing power and income distribution of the survey households. Sample for the survey was thus based on the findings generated from respondents.

- ❖ 45% of households recorded a monthly spend of N30,000 – N50,000.

Q: Which of the following statements best explain your role in choosing the cooking fuel to be used in the household?...

Q: About how much do you spend per month in your household?

• FUEL PURCHASE DECISION BY DEMOGRAPHICS

- ❖ Most female (70%) decide on the cooking fuel to use in the households especially in Semi-Urban centers.
- ❖ Males seem to make more recommendations than actual purchase or usage.

PURCHASE DECISION	Total	Male	Female	Lagos	Abuja	Urban	Semi-Urban
Base	618	166	451	359	256	210	404
	%	%	%	%	%	%	%
I decide on which Cooking fuel to use in the household by myself	66	55	70	67	64	59	69
I decide on which Cooking fuel to use in the household but someone else in the household does the actual purchasing and usage	26	34	23	23	30	31	23
I recommend the Cooking fuel to use in the household	9	11	8	11	6	10	8

Q: Which of the following statements best explain your role in choosing the cooking fuel to be used in the household?...

HOUSEHOLD SPEND BY DEMOGRAPHICS

- ❖ Males that were interviewed in Households reported higher spending capacity by households especially in Urban centers.
- ❖ 22% of households mostly in Semi-Urban could recall or provide information on monthly household spend. If could either be lack of record keeping or unwillingness to disclose.

PURCHASE DECISION	Total	Male	Female	Lagos	Abuja	Urban	Semi-Urban
Base	618	166	451	359	256	210	404
	%	%	%	%	%	%	%
Naira 30,000 to < Naira 50,000	45	34	47	43	48	47	44
Naira 50,000 to < Naira 100,000	21	19	22	25	15	31	16
Naira 10,000 to < Naira 30,000	18	12	18	22	11	12	21
Naira 100,000 to < Naira 250,000	2	8	1	3	1	6	0
Up to Naira 10,000	1	0	2	1	1	1	1
Naira 250,000 to < Naira 500,000	0	2	0	0	1	1	0
Refused / Don't know	12	25	10	5	22	3	17

Q: About how much do you spend per month in your household?

CULTURAL ICONS (ROLE MODELS)

Mothers appears to be the strongest influencers among the generality. Followed by male spouses among female housewives. These key influencers would make effective ambassadors / agents for the clean cook stove Campaign .

MOTHERS — *General Consensus*



Mothers enjoyed the highest mention amongst the generality.

A strong personality that is reckoned with in the lives of the target audience.

Considered as a **Friend** and **Advisor** - hence, wields very strong influence .

SUCCESSFUL BUSINESS MAGNATES



Aliko Dangote



Femi Otedola



INDIVIDUAL CAREER /
BUSINESS MENTORS

MUSICAL / MOVIE ICONS (Females mainly)



Celine
Dion



Tope
Alabi
(Gospel
Singer)



Funke
Akindele

SPORTS ICONS (Males Mainly)



Lionel Messi



Didier Drogba

Other Significant Mentions;

- Spouse ; a strong support
 - Siblings / female relatives,
 - Religious leaders / wives of religious leaders
 - Educational Instructors / teachers
 - Local politicians (Senators, Governors - **Abuja Mainly**)
- } **Females mainly**

“ VERBATIM - CULTURAL ICONS (ROLE MODELS)

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The reason why i said my mother is because my mother is a very strong woman, she is my prayer warrior, she is everything, everything , I have today, she is a woman that made me a graduate, so if I have any problems now the first person I call is my mother , she is always there, she is a wonderful woman.

Females, 18 – 29 years, C2, Urban , Lagos

My husband , I don't have any other person except him. ... whenever I look for something that I don't have , if I complain to him if he have , he will assist me , if I don't have enough if he has he will assist me .

Female, 18 – 29 years, DE, Semi – urban, Abuja

“my previous boss, when I was into computer engineering; he wasn't too popular but he 'made' himself, he has a house and he is able to take care of his family and he is able to think widely and do different kind of business so I wish that I can be like him”

Males, 18 – 29 years, DE, Semi – Urban, Lagos .

My role model ...she own her shop , at times I go to her for business orientation , I will go and meet her and discuss how to succeed in life... ,

Females, 30 – 45 years, DE, Urban, Abuja

“ Paul Drogba, he is a footballer, when he was at Manchester United at his teenage years, they did not use him frequently because there were other big players, but he still believed he can do it and moved to the next club and later United bought him again and he came back to the club. He believed he can do it”

Males , 18 – 29 years, DE, Semi –Urban , Lagos

my mother and my mother again and again.. She influenced my coming to Lagos.. She made me to stop smoking... she believed in me

so I wants to say my most influential person in my life is my Pastor, Pastor Wisdom . That man has been so nice in every area , he is my teacherhe has been impacting morally, spiritually , every area of it into my life

Males, DE, 300 – 45 years, Urban , Lagos.

“ my mother is my role model, she is a praying mother and she gives advice; whenever I say I'm tired of this thing, she will say “don't leave your house for another woman o” and that advice alone always rings in my brain, so she is my role model ..
Females, 30 – 45 years, C2, Semi – Urban, Lagos



SECTION 2:

COOKING HABITS IN THE HOUSEHOLD/
LIFE CONCERNS, FINANCIAL / PURCHASING
HABITS , SALES PERSONS, STATUS SYMBOLS

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COOKING HABITS IN THE HOUSEHOLDS

- ❖ Cooking is done quite often. 77% of the respondents claim to cook everyday of the week.
- ❖ 43% cook at least twice in a day while 28% cook up to three times in a day on average.

PURCHASE DECISION	Total	Male	Female	Lagos	Abuja	Urban	Semi-Urban
Base	618	166	451	359	256	210	404
	%	%	%	%	%	%	%
Every day of the week	77	57	84	71	85	76	77
5-6 times a week	4	5	3	6	1	4	3
3-4times a week	10	17	8	13	6	11	10
Less often	9	17	6	10	7	9	9
Don't Cook	1	3	0	1	1	0	1

PURCHASE DECISION	Total	Male	Female	Lagos	Abuja	Urban	Semi-Urban
Base	618	166	451	359	256	210	404
	%	%	%	%	%	%	%
Once	24	34	20	31	14	28	22
Twice	43	38	45	44	41	47	41
Three times	28	21	31	18	42	20	32
Four times	2	1	3	3	1	1	3
Don't cook	2	5	1	3	1	4	1

Q: How many times in an average week do you cook?

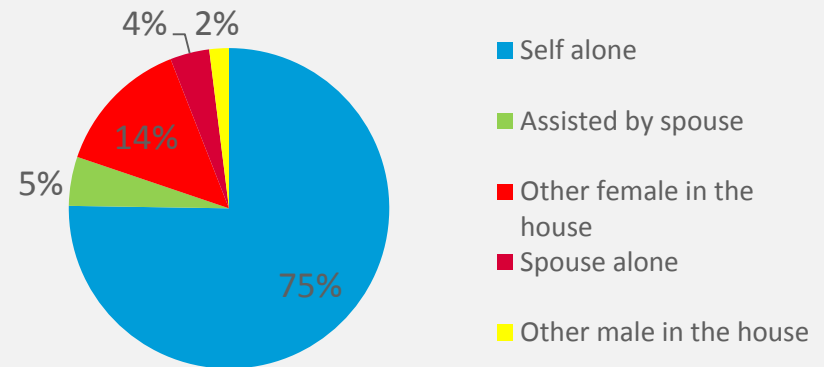
Q: How many times in an average day do you cook?

COOKING HABITS IN THE HOUSEHOLDS

• THOSE THAT COOK IN THE HOUSEHOLD BY DEMOGRAPHICS

- ❖ Given that the larger sample comprise of main cooking fuel decision, 75% of the cooking is done by the respondents.
- ❖ Cooking is done mainly by female.
- ❖ For males that cook, 12% of them were assisted by their spouse while only 2% of females that cook were assisted by their spouse.

Main Cook in the Household



	Total	Male	Female	Lagos	Abuja	Urban	Semi-Urban
Base	618	166	451	359	256	210	404
	%	%	%	%	%	%	%
Self alone	76	45	87	77	74	78	75
Assisted by spouse	5	12	2	5	5	7	4
Spouse alone	4	13	0	3	5	2	5
Other female in the house	14	23	10	13	15	10	15
Other male in the house	2	6	1	3	2	3	1

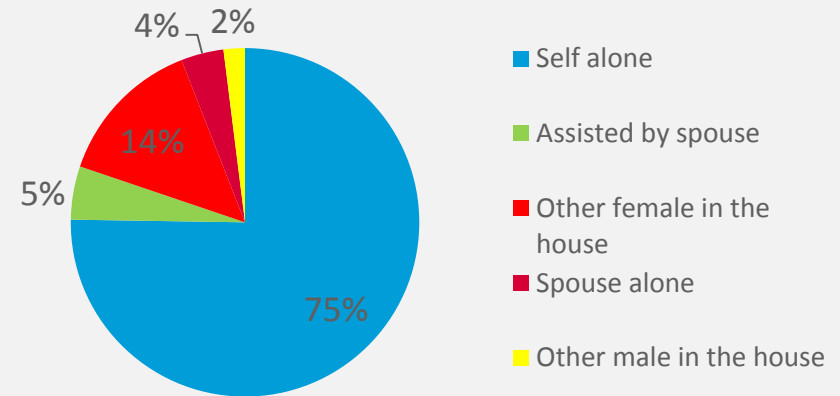
Q: Who is the main person that cook in the household?

COOKING HABITS IN THE HOUSEHOLDS

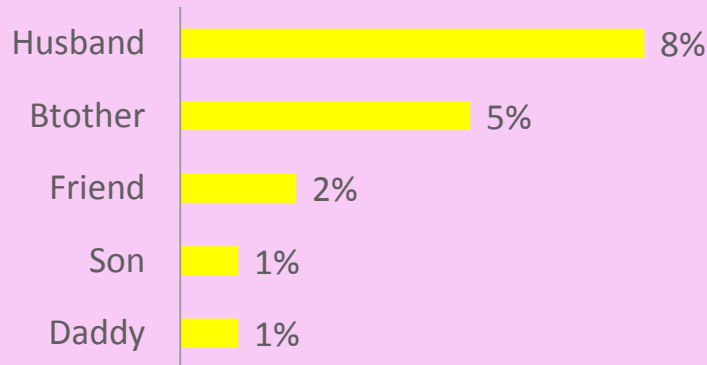
- **THOSE THAT COOK IN THE HOUSEHOLD**

- ❖ Given that the larger sample comprise of main cooking fuel decision, 75% of the cooking is done by the respondents.
- ❖ A lot more female assist in cooking than male in households

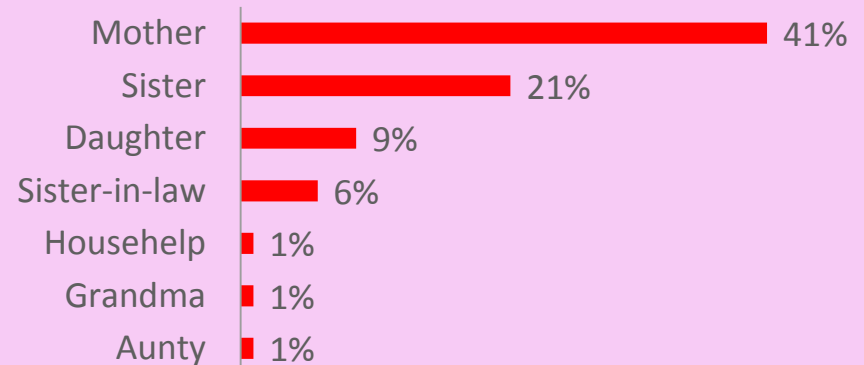
Main Cook in the Household



Other male that help in cooking (B:*12)



Other Female that help to cook (B:87)



Q: Who is the main person that cook in the household?

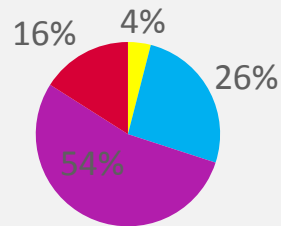
Q: Who else help with cooking in the house?

COOKING HABITS IN THE HOUSEHOLDS

• COOKING TIME BY FUEL SOURCES

Cooking time per occasion

- 5min to 15 mins
- 15mins to 30 mins
- 30mins – 1 hour
- More than 1 hour



- ❖ More than half of the respondents (54%) cook for longer time, 30mins to 1hour. 26% also claim to cook for more than one hour per cooking occasion.
- ❖ This trend shows high cooking fuel consumption irrespective of the fuel method used.

	Total	BIOMASS	KEROSENE	LPG	Electric
BASE	618	159	257	188	*14
	%	%	%	%	%
5min to 15 mins	4	3	5	5	7
15mins to 30 mins	26	18	29	27	36
30mins – 1 hour	54	60	52	53	50
More than 1 hour	16	19	15	15	7

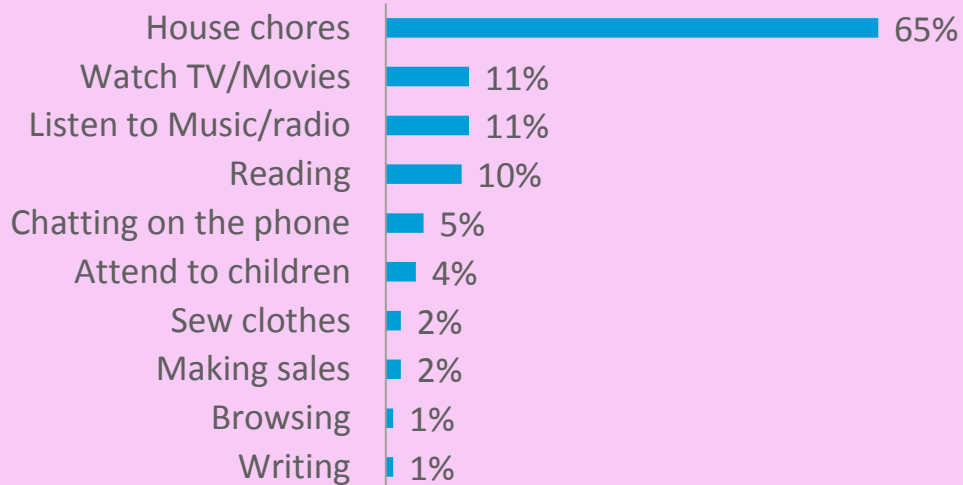
- ❖ Those that use Biomass actually cook for longer time per cooking occasion than others.
- ❖ Electric is used for shorter length of time than all other cooking fuel methods.

Q: How long do you cook per cooking occasion?

COOKING HABITS IN THE HOUSEHOLDS

• ACTIVITIES WHILE COOKING

Those that do other activities while cooking (B:262)



❖ Some respondents while cooking engage in several non-cooking activities such as; house chores (65%), Watching TV, movies and listening to music/radio (22%), reading (10%) and other activities at lower mention. This could be driven by long length of time they spent while cooking as shown above.

❖ Generally, users of various cooking fuel methods engage in house chores while cooking. This could probably be to utilize the time spent cooking.

❖ Those that cook with electric watch TV/movies more while cooking.

	Total	BIOMASS	KEROSENE	LPG	Electric
BASE	618	159	257	188	*14
	%	%	%	%	%
House chores	28	25	26	32	43
Listen to music/radio	5	1	8	3	7
Watch TV/Movies	5	1	5	7	21
Reading	4	3	2	7	0
Attend to children	2	3	1	2	7
Chatting on phone	2	1	2	3	0
Attend to customers/Makes sales	1	1	1	2	0
Sew clothes	1	1	1	1	0

Q: What other thing do you do while cooking?

CONCERNS WITH COOKING METHODS - 1

Financial, Social , Health, Aesthetics, Physical Inconvenience and Environmental pollution are concerns expressed with regards to cooking / cooking methods, - in no order of mention.

Financial concerns ; (Key)

- High cost of kerosene particularly . A liter is sold for between N300 and N400 – depending on the location. This has made some users to downgrade to cheaper alternatives like firewood/ charcoal, sawdust .
- More so, it is rarely available at the fuel / gasoline stations . Hence consumers resort to buying from 'black market' sellers within their neighborhood.
- The accessibility at fuel stations scarcity and high cost of kerosene has led to unscrupulous sellers to adulterate same with diesel with the aim to make more money. The impact of this as claimed by the respondents are;
 - ✓ higher smoke emission – which blacken cooking utensils / walls ,
 - ✓ possible cases of fire explosion.

• Social concerns :

- Usage of biomass convey a lower status / poor image of the user when among users of kerosene.

“The only concerned that I have is where I live , I want to step up,other people using kerosene, might be saying ; “ haa why are you using charcoal, are you local (primitive) ?” that is the only thing that gives me concerned”

CONCERNS WITH COOKING METHODS - 2

Health Issues ;

- Effect of smoke (especially from firewood) on self / other;
 - ✓ Induces cough / respiratory issues
 - ✓ Irritates the eyes (induces tears, makes redness of eye balls)
- Exposure to direct heat / fire over a long period of time give rise to health issues

“... sometime ago, something happened to someone that is older to me, when she is not feeling fine, then she went to hospital then they told her that her problem is that she used to go near lighted firewood every day, so doctor told her that she should stay away from using firewood , because it was what was causing her problem”

Aesthetic concerns ;

- Use of biomass (especially fire wood) stains the cooking utensils and surrounding walls with black soot – giving an unappealing look / environment .

Concerns on Physical inconvenience ;

- This refers to the resulting stress of bending down to blow / fan the ignited charcoal / firewood for maximum performance . This inconvenience is more if the user is a nursing mother – with an strapped on her back.

“ sometime the baby will be struggling on her own, it (firewood) will not catch (ignite properly) on time that is when I feel that stress”

CONCERNS WITH COOKING METHODS - 3

Concerns of Environmental Pollution

- Usage of biomass (particularly firewood) is not conducive when used in cooking areas inside the house . It is best used outside the house – where the pollution caused by the smoke is minimal .

“Now when I’m cooking with firewood, because of the smoke they (neighbours) will be complaining; ‘blow the firewood the smoke is affecting us’ , so I normally cook outside”.

GENERAL LIFE'S CONCERNS

- On a general note, key life concerns cuts across various spheres and it differs in terms of priority in both locations of the study .
- Common concern across both locations is the high cost of living .

Lagos	Abuja
Physical well being Having good health is considered a primary necessity . It gives room to maximally achieve life aspirations .	Issues of security ; Fear of loss of life / assets due to terrorist attacks . Without relative peace, the ideal life cannot be lived .
Spiritual Well being Religion plays a key role in the life of the average Nigerian. Belief in the divine to direct and support in the journey and struggles of life , is a path to achieve life's success and aspirations .	High cost of living ; Current inflated cost of basic commodities coupled with consisted low income / earnings has aggravated hardship. Hence , the struggle to purchase basic necessities
Education The leverage to have a better life. It makes one more exposed and enhances status	<i>"Without security no matter how, when there is war , you will not remember the money you keep under the pillow...."</i> Females, 30 – 45 years, DE, Urban , Abuja.
Having Cordial Family relationship Cordiality is a function of tolerance, understanding, love and care demonstrated among household members - to foster peace and unity - to make life more meaningful .	<i>"Because when you are not healthy and you keep falling sick, your money keeps going"</i>
Finance ; Inability to adequately meet financial obligations due current economic hardship / High cost of living .	<i>"When you are educated, you have more of life ...You have more advantage than somebody that does not go to school".</i> Females, 18 – 29 years, C2, Urban , Lagos

SAVING; -The habit of saving money is still in practice , but amount saved is now lower – compared with the past - due to the current economic hardship .

- The motivation to save money is primarily to take care of ;
 - Emergencies / unforeseen circumstance e.g. hospital bills etc.
 - To financially support spouse in time of need (females mainly)
 - To re - invest in business / mitigate risk of business (business owners)
- Method of saving is either ;
 - Formal; via daily or monthly thrift contribution
 - Informal ; with the bank

“The saving now is not as much as you save before , because of the cost of living at the moment ...”

Males, 30 – 45 years, DE, Urban , Lagos

“I do save money, because I have younger ones so sometimes - like this early morning, they will meet me and request for money , so if I did not save it definitely I will not have it ... that why I do save “

Males, 30 – 45 years, DE, Urban, Abuja

“because of our children and also for family members, they can call you that they need money and for the children if they need money and their dad isn’t in”

“We save to contribute to the family, we save in-order to make it easy for our husbands; it’s not that when our husbands don’t have it we will sit down as a lazy woman, like a full housewife you will stretch your legs and you are not doing anything; at least you should be supportive, we are helpers to our husbands”

Females, 30 – 45 years, C2, Semi – Urban, Lagos.

• SAVINGS AND SAVING INSTITUTION

- ❖ 75% of the respondents recorded that they save. Savings culture is recorded more by male in urban centers.
- ❖ 82% of those who save, save with commercial banks. 17% save with savings collectors like alajo, adako, akawo etc.
- ❖ Another 14% save at home.

	Total	Male	Female	Lagos	Abuja	Urban	Semi-Urban
Base	618	166	451	359	256	210	404
	%	%	%	%	%	%	%
Yes, I save	75	87	71	76	74	80	73
No, I do not save	25	13	29	24	26	20	27

	Total	Male	Female	Lagos	Abuja	Urban	Semi-Urban
Base	618	166	451	359	256	210	404
	%	%	%	%	%	%	%
Commercial bank	82	92	77	85	77	83	80
Savings collectors e.g alajo, akawo	17	8	21	21	11	16	17
Saved at home	14	13	15	9	22	13	16
Savings groups/clubs e.g esusu, adashi, Adako	7	2	9	4	11	7	6
Microfinance bank	2	2	2	2	1	1	2
Saved with family/friends	2	1	2	2	2	4	1
Saved at business	1	1	1	0	2	1	1

Q: Do you save?...Where do you save?

HOUSEHOLD SHOPPING ;

Male spouses influence purchase decision and are responsible for the high value purchases of the house hold. In this light, LPG stoves may not be an exception if it is decided to be bought.

- Male spouses are very involved in shopping for the household, howbeit, it is a duty for the wife – especially if it is household consumables / groceries.
- Large value purchase decision is usually jointly made by the couple .
- The wife usually identify the need and communicate same to her spouse.
- However, the husband makes the final decision / gives approval for the purchase of same.
- Husbands take responsibility for the purchase as they boast to be better in carrying out 'due diligence' (*to get information that enable smart decision making about the product category*) with regards, to price, brand, features etc.
- Examples of high value purchase include; house hold appliance/ electrical gadgets such as chest freezer, TV, Refrigerator, furniture, etc.
- Funds could be sourced by the husband alone or jointly by the couple

EXPENSES FEMALES MAKE

- On the average among the females. **Food stuff** and **cooking fuel** are basic needs essential in running the household – a key responsibility hinged on the female head of household.
- It appears that purchase of cooking fuel among the target audience is more on a daily / weekly basis
- Highlighted are items that most money is spent on

Daily	Weekly	Monthly
<ul style="list-style-type: none"> • Food stuff (unit measure <i>rice, beans, garri etc.</i>) • Snacks for children • Detergent • Fruits • Water • Refuse / waste • Communication (air time / call cards) • Cooking fuel (coal, kerosene - some) 	<ul style="list-style-type: none"> • Food stuff (bulk measure) • Cooking fuel (<i>coal / kerosene</i>) • Refuse / waste 	<ul style="list-style-type: none"> • Foodstuff (<i>bulk measure</i>) • Groceries • Bills; <ul style="list-style-type: none"> ○ House rent ○ Waste disposal ○ Electricity ○ TV cable subscription • Hair do • Clothes • Shoes • Bags <p>C2, SEC mainly</p>

EXPENSES MALES MAKE

- Highlighted are items most money is spent on among the secondary audience.
- Noticeably, purchase of cooking fuel is not in the scope of married males.
- It appears they are attuned to spending on what impacts on their business in order to generate resources / income to provide for their household such as – communication, transportation.

Daily	Weekly	Monthly
<ul style="list-style-type: none"> Food stuff Liquid beverage (water, alcohol) Transportation Thrift contribution Fuel (petro/gasoline) ; to power generator at place of business Communication / airtime 	<ul style="list-style-type: none"> Food stuff Church offering / tithe Waste disposal Fuel - to power generator at place of business / home Recreation / clubbing Haircut / personal grooming Communication (air time) 	<ul style="list-style-type: none"> Food Stuff Bills; <ul style="list-style-type: none"> House rent Waste disposal Electricity Water

- **Friendly / approachable, honest, attractive looking and hygienic sellers are attractive to buyers. No importance is paid to tribe/language.**

- **The open market is the most preferred by the majority for shopping as it offers cheaper items, opportunity to bargain and access to a wide range of items.**



Open Market

“Because open market things are cheaper, where you go and price (bargain), you make your choice with your pocket”

- **The preferred / ideal shop ,stall, ‘stand’ is described as ;**
 - Neat and attractive with neat environment (*devoid of dirt, vectors such as flies, rats etc.*)
 - Stocked with varieties of products
 - Spacious and easy to navigate within
 - With a seller that is;
 - Friendly / displays a pleasant attitude - (not rude/arrogant, forceful / aggressive)
 - Honest (*uses non distorted units of measurement*).
 - Appealing appearance ; dresses well / looks attractive
- **The pleasant and patronizing attitude of a seller is considered very important because is a strong pull to any buyer. It makes buyers feel at ease and willing to patronize them.**

“I hate dirt; there was a day I wanted to buy bread from somebody and she was using her hand to pick her nose, in fact I just left the bread and went, I couldn’t even collect it. Hygiene is very important”

*“Customer care is very important .
You know some people if they are selling something they will be laughing with you... even if they are cheating you, you will not bother”*

- **Sales pitches from sellers with a friendly manner of approach makes positive impact on buyers.**
- **In the light of the above, tribe / language of the sales person does not matter to buyers.**

“Their manner of approach matters ... I can buy from any body”

PRICE HAGGLING

- Price haggling is an old age tradition and norm. Practiced typically in the open market. A means to minimize spend and save money – particularly during this era of economic recession.
- Price haggling is a norm in the open market. Displayed products are devoid of price tags – as against what obtains in the super markets.

“I price o, the only place I can’t price is a supermarket because they have their price tag”

“In an open market you can go to this place and this one will say is N1200 , if you walk further a bit you could see it for N800 , so that is why is called open market ”

- Buyers haggle price due to;
 - Limited resources / funds, hence, need to align with predetermined budget .
 - It gives opportunity to minimize spend and save money. Some housewives generate money they save informally through this avenue.

“to minimize the money I am holding, to be able to manage the money”

“A woman that knows where she is going (that is focused) , do you understand , so you have to plan yourself”

“ Even the money he gave me, I have to gain from it.(save out of it), Because I will do daily contribution from it.

PRICE HAGGLING

- ❖ Good price followed by more quantity are the key drivers for haggling.
- ❖ Almost same number of male and female feel haggling is importance to them.
- ❖ Haggling for more quantity is rated higher in Abuja than Lagos by 49%.
- ❖ Semi-Urban centers feel haggling is more important for price than Urban Center.

	Total	Male	Female	Lagos	Abuja	Urban	Semi-Urban
Base	618	166	451	359	256	210	404
	%	%	%	%	%	%	%
I feel it is important to bargain to get good price	84	81	85	84	83	74	89
I feel it is important to bargain to get more quantity	58	53	60	37	86	57	58
I feel bargaining is unfair to the seller	2	3	2	2	3	2	2
I feel bargaining is not important as it wastes my time	3	4	3	2	4	4	2
I feel bargaining is not important as it will make me buy low quality/inferior goods	2	1	3	1	4	2	2

Q: How do you feel about haggling/bargaining for your purchases?

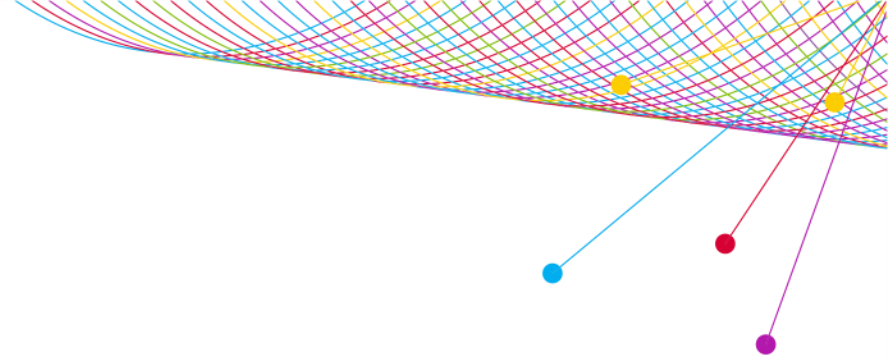
STATUS SYMBOL

Physical appearance is a primary / key indicator of status . Ownership / upgrade of household durables reflect same . Highlighted are appealing indicators

- An individual's appearance is considered highly important. It tells the kind of person one is. It is commonly emphasized with the popular cliché which says ; *the way you dress determines how you would be addressed.*
- Status symbol indicators include :
 - **Appearance; Appealing, sophisticated, modern and decent way of dressing**
 - **Attitude; courteous, polite, respectful, amiable**
 - Kind of people associated with / company kept.
 - Superior way of reasoning
 - **Owning own house ; eases one the burden of paying rent – cost of housing is very high**
 - Sends children to foreign schools
 - Regular foreign vacation trips
 - Higher purchasing power
 - Ownership of / upgrade of household durables e.g. ;
 - ✓ Change size of generator
 - ✓ Change electronic devices
 - ✓ Move to a larger apartment
 - ✓ Change from using kerosene stove to gas cooker, charcoal / firewood to kerosene
 - ✓ Ownership of a car

Attracts honour / respect

“somebody that is using okada (2 wheeler) before, now bought a car”



SECTION 3:

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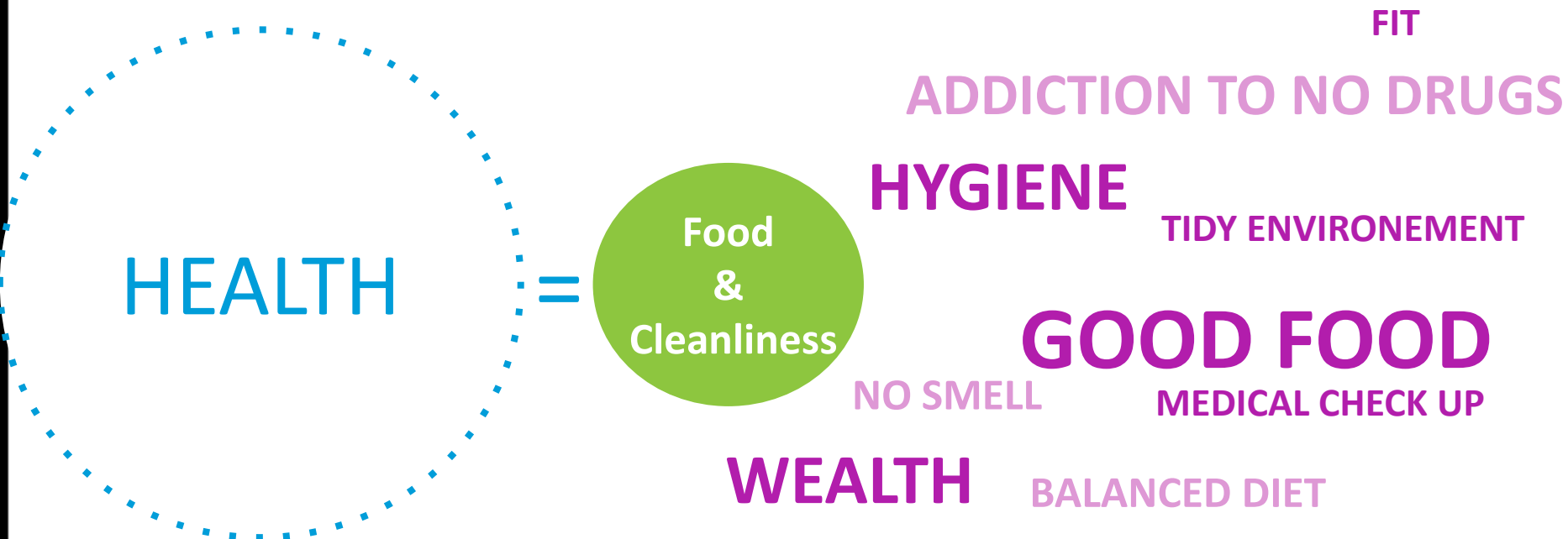
ASSOCIATIONS WITH HEALTH
HEALTH ISSUES & SOURCES OF INFORMATION ON HEALTH
PERCEPTION & INTERACTION WITH BIOMASS / KEROSENE
FUELS

UNDERSTANDING OF HEALTH

There is a common saying the 'Health is wealth'. It means that when one has good health, one has every thing . It is associated with wholesome food and hygiene.

Health is considered as the most important thing in life. It is succinctly defined as a condition of being normal / fit.

For the participants, the importance of physical health comes from the fact that it's a prerequisite to generate wealth to provide for themselves and their families.



VERBATIMS – ABOUT HEALTH

“

Health is wealth... means that when you are healthy you will be wealthy.

*FEMALE, 30-45 years old, C2
SEMI -URBAN
LAGOS*

”

“

Doing test and check-ups and staying away from difficult works

“

First of all it is food, if you don't eat you will not have a good health

*MALE, 18-29 years old, C2
URBAN ,Abuja*

”

*MALE, 18-29 years old, SEC DE
SEMI URBAN
LAGOS*

”

WAYS OF ENSURING GOOD HEALTH

Type of cooking stove used is not mentioned among the various ways of ensuring good health among the target audience.

This is a salient point to note . Strategic communication that type of cooking stove used is a way of ensuring good health may be a starting point to trigger behavioral change .

- The following are ways the target audience ensure good health:
 - Ensuring personal hygiene
 - ✓ eating right - nutritious meals, balanced diet, low cholesterol intake , fruits and vegetable
 - Ensure environmental hygiene
 - ✓ Ensure surrounding is devoid of dirt / stagnant water, use of insecticide, proper disposal of refuse etc.
 - Keep informed on health information / news (via media / social media etc.)
 - Periodic medical check up at hospital / health center (few)

HEALTH BELIEFS ASSOCIATED WITH COOKING / FOOD PREPARATION

Respiratory issues, Irritated eyes, stomach upset and possible physical harm/injury are primary.

Firewood/charcoal

- Among users of firewood, complain about the effect of inhaling the smoke and the irritating effect it has on the eyes and cough it induces are primary.
- A few amongst the target audience associate respiratory disease (asthma) with fire wood smoke.
- Stoking firewood could lead to accidental burning of the hand.
- Uncontrolled heat from firewood could get the meal burnt / under cooked – which could lead to stomach upset .

Kerosene

- When switching the kerosene stove on and off, it generates a smoke that is as harmful as when using firewood/charcoal: eyes irritation and respiratory problems.
- A few are of the opinion that the use of kerosene is unhealthy: the 'chemical' smell and taste of kerosene is perceived in what is cooked.

“ ... like me , this kerosene issue that is why I don't use it, even the scent of the kerosene will be inside the food, you will be perceiving it, and the smell is so poisonous , so irritating but when I cook with my charcoal, even if you are perceiving that charcoal smell , it won't affect you, but kerosene is chemical, the chemical they are using now is too powerful ”

“ When you inhale a lot of smoke it causes cough and there will be air pollution. ”

• HEALTH ISSUES EXPERIENCED BY FUEL TYPE USED

- ❖ Overall, health issue experienced is very low across a range of health issues surveyed. LPG is the only cooking fuel with the least report of health issue experienced.
- ❖ The common health issues ever experienced are: Burns (17%), Eye irritation (16%), Coughing & Sneezing (17%).

		Total	BIOMASS	KEROSENE	LPG	Electric
	BASE	618	159	257	188	*14
	Response	%	%	%	%	%
Burns	Yes	17	27	15	11	21
	No	83	73	85	89	79
Eye irritation	Yes	16	28	18	5	14
	No	84	72	82	95	86
Coughing and sneezing	Yes	17	25	15	12	21
	No	83	75	85	88	79
Chest pains	Yes	6	10	3	5	14
	No	94	90	97	95	86
Shortness of breath	Yes	2	2	2	1	0
	No	98	98	98	99	100
Irritation of nose and throat	Yes	6	8	5	5	7
	No	94	92	95	95	93

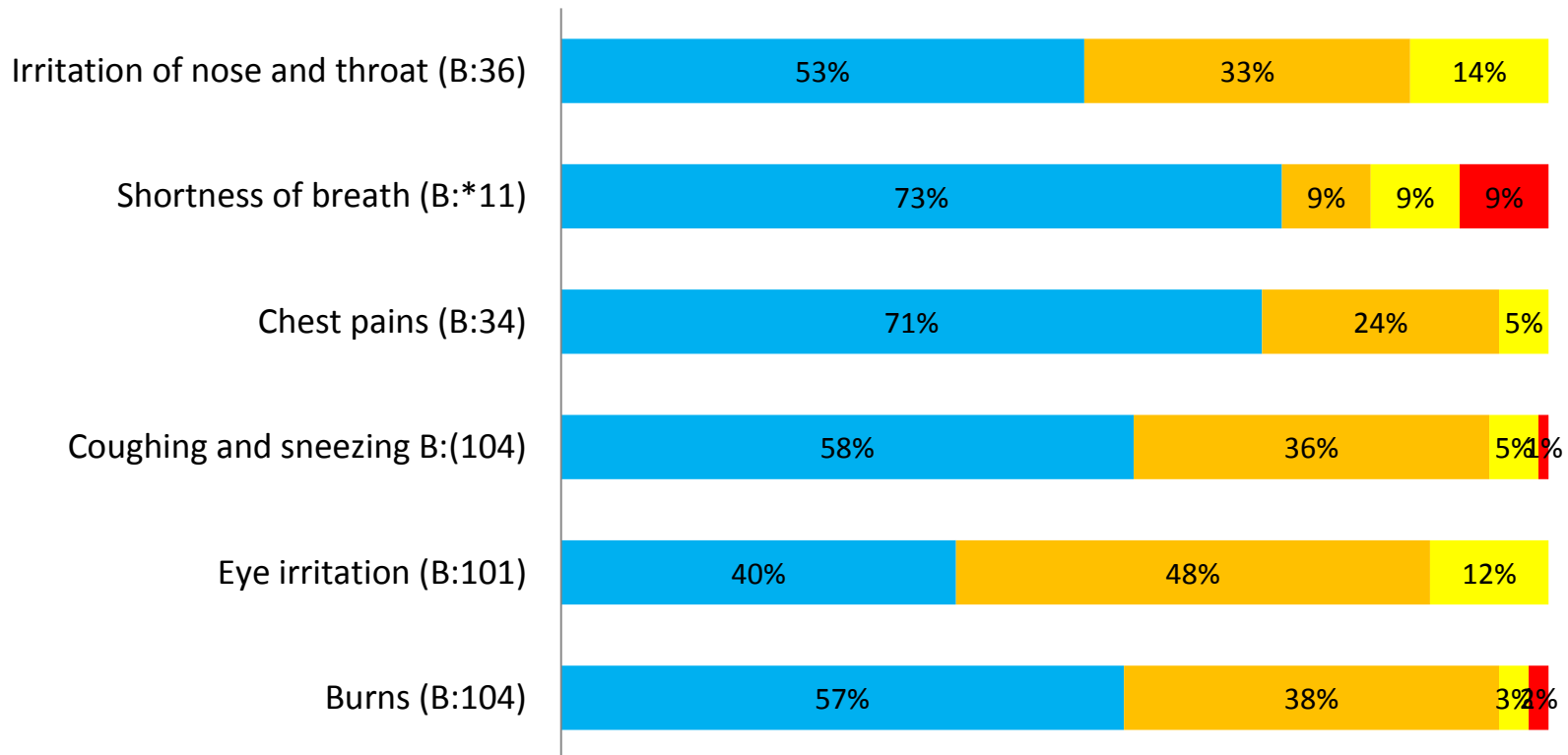
Q: Which of the following have you experienced?

- **FREQUENCY OF EXPERIENCING THE HEALTH ISSUES**

- ❖ The health issues are seldom experienced.
- ❖ Eye irritation is experienced more.

Frequency of Experiencing health issues

Once in a while Sometimes Frequently Don't know



Q: How often do you experience each of the following conditions?

SOURCES FOR HEALTH INFORMATION

- Health information channels that are 'Easy to access', 'Fast', 'Trusted & Reliable' are visited.
- It is worthy to note that target audience usually practice self medication until there is obvious need to seek proper medical attention
- Primary source of health information differ among individuals. Overall, they include;

INTERNET - *Using search engines*

Using personal mobile phones which is a readily accessible 'on the go' device, easy and fast to get answers / information sought for.

ELECTRONIC MEDIA

- TV (*offers audio visual attributes*)
- Radio

WORD OF MOUTH FROM A MEDICAL PERSONNEL -

Informally via a nurse friend / nurse residing within the neighborhood

- Opinion is trusted being a health professional.
- Easier to access than doctors.

PATENTED DRUGSTORES / REGISTERED PHARMACIES -

The OTC seller / pharmacist respectively are consulted

- Such medical channels are usually visited due to their proximity to residence.

HEALTH CENTERS / HOSPITALS – *From health personnel*

HEALTH SEMINARS / OUTREACHES ORGANIZED BY CHURCHES

FROM OLDER / ELDERLY PEOPLE AROUND

Due to their experience

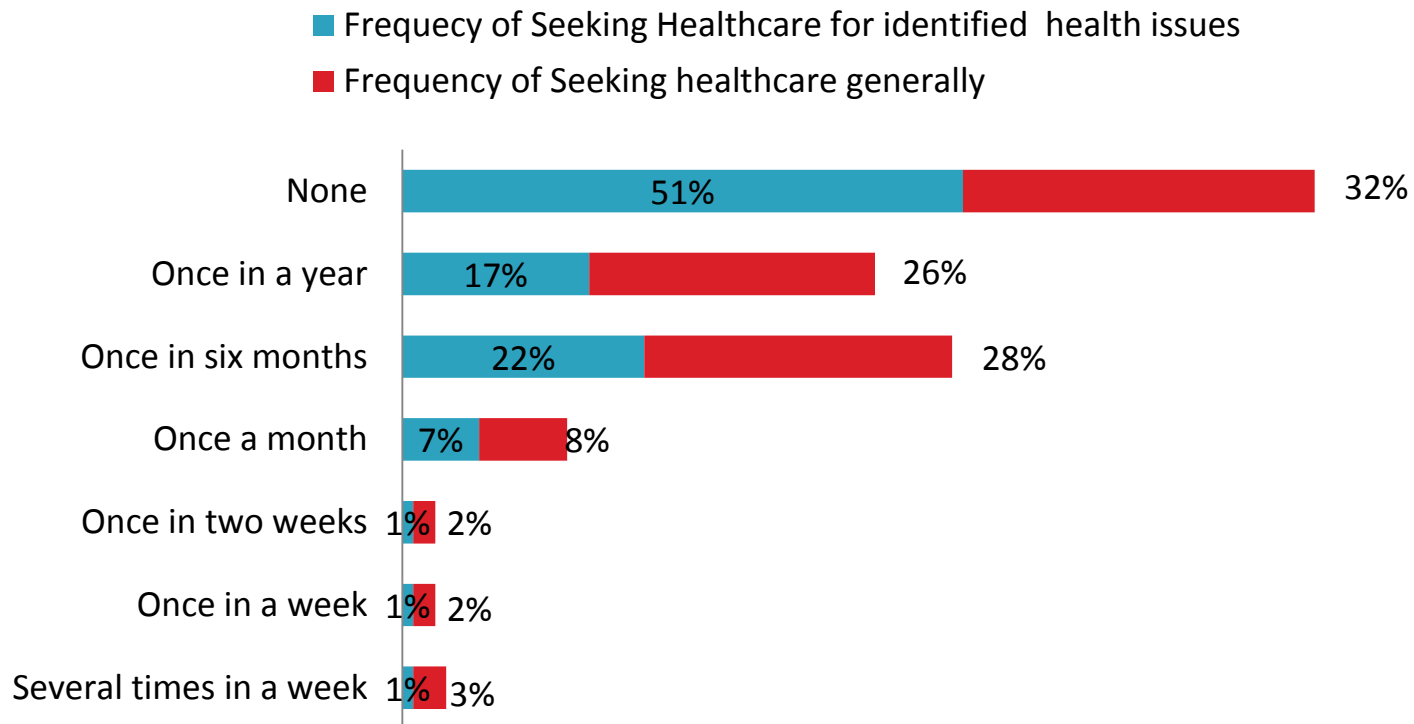
MEDICAL BOOKS *(few)*

Family Physician

• FREQUENCY OF SEEKING HEALTH CARE

- ❖ Respondents seek healthcare more than they seek healthcare specifically for the health issue experienced. It seems that when they experience health issue with LPG, they do not seek for medical care. This could be attributed to either the unserious nature of the issue or lack of awareness on dangers of having such health issues associated with LPG usage.

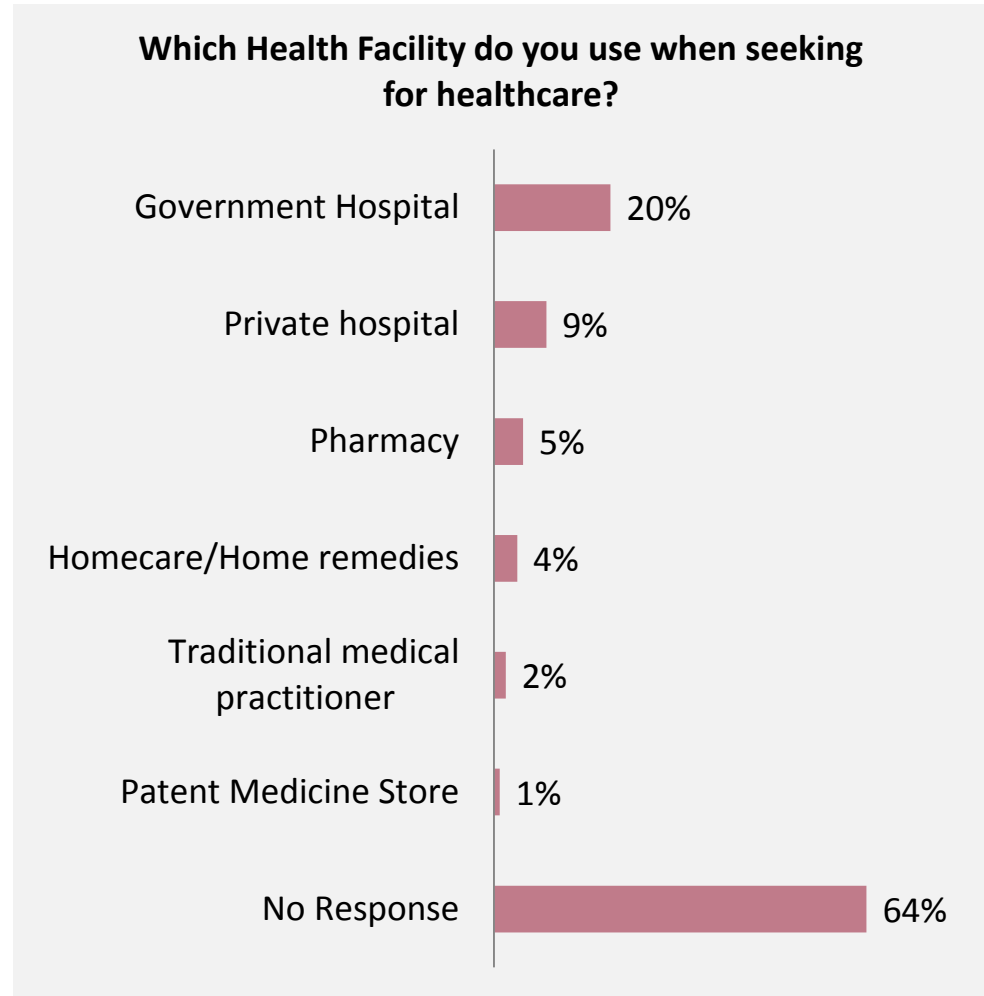
How often do you seek healthcare for the health issue experienced?



Q: How often do you seek medical care?

- **HEALTH FACILITY USED**

- ❖ 20% of those that responded use government hospital.
- ❖ 9% use private hospitals while 5% visit pharmacy.



SPONTANEOUS ASSOCIATIONS – HOUSEHOLD COOKING FUEL

FIREWOOD
ELECTRIC
GAS COOKER **SAWDUST**
CHARCOAL
PALM KERNEL SHAFT *
BOILING RING
'OGUNSHO'*
KEROSENE STOVE

* but its majorly used to start a fire

(also used primarily to ignite. However, may be used exclusively if in abundance)

COOKING FUEL - AWARENESS

- ❖ Awareness on various cooking fuel types shows Kerosene as the most popular. (41%) on Top-of-mind mention. LPG is the second highest cooking fuel type on top of mind mention (33%).

Cooking Fuel - AWARENESS				
	TOP OF MIND	SPONTANEOUS	AIDED	TOTAL AWARENESS
BASE	618	618	618	618
	%	%	%	%
Kerosene stove	41	54	4	99
LPG cook stove/gas	33	46	14	92
Firewood	13	45	35	93
Charcoal	7	55	32	94
Electricity (Electric cooker/hot plate etc)	3	38	38	79
Fixed mud stove	0	5	12	17
Saw dust	0	8	32	40

Q: When you think of Cooking fuel method in Nigeria, which one method comes to mind first? **(Top of Mind Awareness)**

Q: What other cooking fuel methods can you think of? *PROBE Any other? Any other? PROBE FULLY (Spontaneous Awareness)*

Q: Now please look at this list and tell me, which of these Cooking fuel method have you ever seen or heard of? **(Aided Awareness)**

BIOMASS FUEL EXPERIENCE – CHARCOAL (1)

In general, the use of biomass is as a result of historical background - many saw their parents and guardian use biomass and have grown accustomed to it



WHO SELLS

Usually sourced from sellers within the neighborhood.



USAGE / PURCHASE

Purchase could be daily / weekly – depending on the individual.



COST

Quantity sold for N100 can be used for at least one cooking occasion.
Cheaper in Abuja (A bag cost between (N1,200 – N 1,500)
In Lagos, a bag is (about N4,500).

Stacked bags of charcoal for sale



Smaller SKUs



DETERMINANTS FOR USAGE

- **Tradition** (*parents used it*)
- **Perceived to give better taste to the meals** (*compared to meals prepared using kerosene and cooking gas*)
- **Easily affordable** (*N100 worth can be used for 2 days*)
- **Readily available**
- **Easier / less stressful to use** (*compared with firewood – needless to keep stoking*)
- **Faster to cook with**
- **Does not darken cooking utensils**
- **Multi functional** - *also used for roasting (corn, plantain, meat etc.)*
- Sold within neighbourhoods – short distance to travel to obtain
- Easy to carry (not heavy)
- Easy to store / preserve

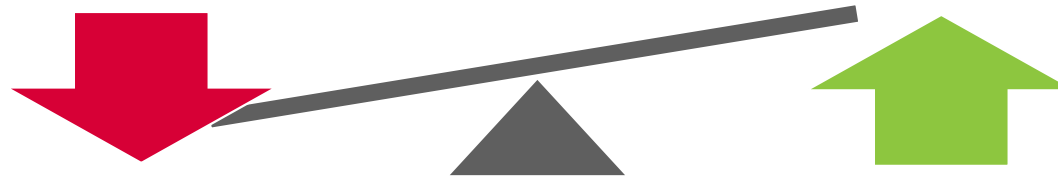
“ We have been using coal for a long time with my mum, so when I got married I saw that , one, if you do it well and is burning well it doesn't give you smoke , and it makes your food cook fast ”



BIOMASS FUEL EXPERIENCE – CHARCOAL (3)

Charcoal usage is popular among biomass users and the likes has a stronger pull than the dislikes.

- Affordability: around N1200- N1500 for one bag of charcoal in Abuja, N4500 in Lagos.
- Availability: easy to find in the neighborhood.
- Speed : when set up properly.
- Accessibility: easy to get as it is sold in their neighborhood by familiar retailers.
- Can be bought in small quantities and last for preparing many meals.
- Cleanliness: neatness of the pot after cooking.
- Economical: increase the coal level by putting stones laid underneath
- No odour
- Seems to give a particular and delicious taste to food
- Emitted heat- post cooking, can keep food warm.



- Charcoal sparkles are sometimes dangerous
- Smoke generated at the initial ignition
- Waste time to light it up
- Require most often airy and spacious location, generally outdoor: due to smoke and heat
- Ashes from burnt charcoal makes the environment/kitchen dirty
- Stressful/difficult to use if not dry - as it will not ignite
- Need to dry after it has been put off with water – for reuse on another cooking occasion.
- Does not fit an 'upscale environment / neighborhood'



BIOMASS FUEL EXPERIENCE – FIREWOOD (1)

An age long method of cooking that has withstood the test of time.



WHO SELLS

Usually sourced by participants themselves from the bush for those living not far, or from sellers within the neighborhood. Due to proximity of sellers helps to build relationship with clients sometimes rewarded by freebies (*a bit extra quantity – locally refereed to as Jara in Pidgin or Fisi in Yoruba language*).



Stacked logs of firewood for sale



USAGE / PURCHASE

Predominantly used outdoors. And typically used when cooking on a large scale – e.g. during festivities / celebrations.



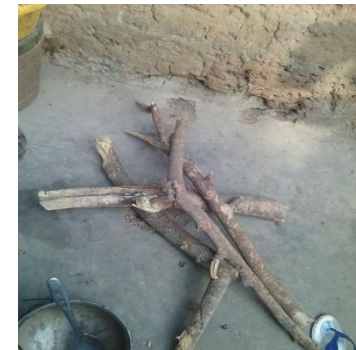
Bundled firewood for sale



COST

It is cheap – especially in the semi – urban (3 pieces cost N50).

For majority of users in the semi – urban, it is sourced at no cost.



Firewood ready for use in the home

Determinants for usage

- Tradition
- Fast cooking
- Considered to enhance taste of meals
- Comparatively cheaper than kerosene (Urban)
- Free / no cost of acquisition (semi – urban)
 - *Some users source firewood for themselves from surrounding bushes and uncompleted building sites with discarded wood*

“I have been using firewood since when I was small and that is what I was brought up with and I’m okay with it ...it is more faster and people use to say it makes food sweeter ...because it makes food delicious..”

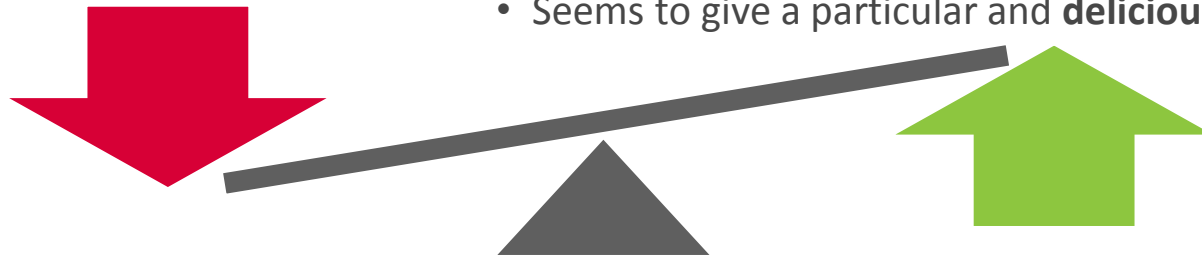
“instead of one wasting money to buy kerosene I prefer to buy firewood, I can just buy #100 own and set it up ..”

Males, 18 – 29 years, DE, Semi- Urban, Lagos

BIOMASS FUEL EXPERIENCE – FIREWOOD (3)

Main feedback from the targets across Abuja and Lagos is considering firewood as the most affordable.

- **Affordability** : consider as the cheapest. Only N50 to disburse for 3 pieces of firewood in the semi urban area.
- **Availability**; easy to get
- **Speed**; cooks fast
- **Accessibility**: easy as it is sold in the neighborhood by familiar retailers.
- **Economical** : Can be bought in small quantities
- Seems to give a particular and **delicious taste to food**



- **Blackens pot** - (*most users now mitigate this by rubbing a mixture of detergent and palm oil on the exterior of the pot. Washing becomes easier afterwards*)
- **Cannot be used indoors** : Require most often airy and spacious location, generally outdoors.
- **Smoke damages health** : according to participants, it causes cough; reason why it's forbidden for people with asthma.
- **The user's clothes and body smells of smoke after usage**



KEROSENE STOVE EXPERIENCE (1)

Main feedback from the participants is related to an increasing cost which causes scarcity



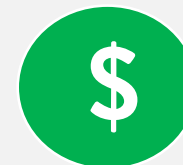
WHO SELLS

Usually sourced from fuel stations / filling stations and also retail sellers in neighborhoods who sell in designated unit measures – (gallons / liter / small or big bottles – half full or filled).
Sellers don't give extra.



USAGE / PURCHASE

Depending on the size of the household, a liter or two is bought daily. Sometimes quantity purchased varies from 5 to 10 liters for a month.



COST

N 3000 / liter



Examples of receptacles used in purchasing kerosene.

KEROSENE STOVE EXPERIENCE (2)

Determinants for usage

- Spouse's influence
- Fast cooking than coal – *(ignition is faster)*
- More convenient / less stressful to use
- Cleaner than biomass
- Stove is considered more portable / easier to move around
- Readily available
- Can be used indoors

“ Number 1 is my husband , he doesn't like gas , he hates it with passion “

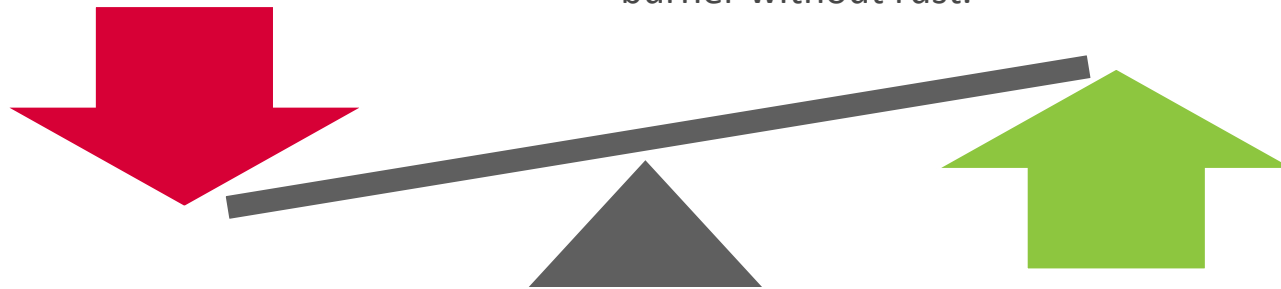
Ethno, Female, 18 – 29 years, C2, Urban, Lagos

KEROSENE STOVE EXPERIENCE (3)

Some users of kerosene also use charcoal – usually to cook meals that are believed to take longer time to cook (*e.g. beans large quantity of soup etc...*)

“I think there are some foods that take longer time to prepare than the other, so when you use the coal it will be faster than the stove like beans, it takes a lot of time to done”

- Speed
- Convenient : when properly set up
- Can be used indoor
- No need for a constant monitoring : allow multitasking even outside the kitchen
- Cleanliness: On the condition of having a good burner without rust.



- Perceived as expensive : N3000 per liter; depends on household members as well as the meals cooked, a minimum of around 2 liters are required each day in Abuja and every 2 days in Lagos.
- Accessibility: recently kerosene has become more expensive and cannot be bought easily
- Availability issues.
- Stains on the pot : when the burner has rust.
- An unpleasant sensation in the eyes: as pepper



VERBATIMS - KEROSENE STOVE EXPERIENCE

“

You can not put it inside the kitchen... the whole of the kitchen will be too much hot
FEMALE, 30-45 years old, DE, URBAN
Abuja

...You can time your (kerosene) stove and do some other work

FEMALE, 30-45 years old, SEC DE,
URBAN Abuja

Stove is fast, is not like the charcoal or the firewood , you need to make the firewood or charcoal ready before you can put your something on it even the firewood I said you on it and make sure that , in fact you fan fan fan even the eyes , what I use them is till affecting my eyes , I use glasses but not ,when am out that is when I use my glasses , so it really affect me, so the kerosene is more better ,small more better than all those one , it does not have side effect ,it doesn't not have em , it has a lot of benefit than others .

Ethno, Female, 19 – 29 years, C2, Urban , Lagos

”

SWITCHING: KEROSENE VS BIOMASS

House owner / landlord and spouse have been identified as key people influencing the switch from biomass to kerosene.

The switch is perceived as a social upgrade but is not definitive; mainly because of money shortage. Food taste and preparation for many are also key.

They moved from Kerosene to Biomass because of :

- Cost : price increase of kerosene
- Money shortage: due to the recession as well as usual budget constraints.
- Kerosene seems scary for some : risk of explosion and fires.
- Considered by some as poisoning the food and giving headaches
- As a backup to make sure that kerosene will last longer.
- Particular taste on foods
- Biomass is sometime available for free (not far from the bush).

They moved from Biomass to Kerosene because of:

- Rule against the use of biomass from house owner/land lord
- Need to upgrade status after relocating from a remote location to align with prevalent lifestyle in current location
- Convenience : kerosene seems to be easy to control
- Tough to light up
- Stains on the pot
- Sparkles can damage the eyes. Rumor talks about blindness.



BIOMASS



KEROSENE

COOKING FUEL – USAGE PATTERN

- ❖ Kerosene is by far the most widespread and commonly used fuel and is followed by LPG. About 30% of respondents use LPG as a primary source of cooking fuel. It should be noted that the 30% indicated that use LPG, might not exclusively use only LPG for cooking.
- ❖ In fact, most people use multiple fuels to meet their cooking needs. The decision to use a particular type of fuel is dictated by a variety of factors including food being cooked and cost of fuel.
- ❖ The survey offers some interesting insights: for example, 21% of the sampled household claim to use Firewood and 19% use charcoal (alongside other fuels which might also be used). It is also of interest to note that of all respondents who claim to use gas in their homes also use some other form of electricity (line supply or battery).
- ❖ There is however an opportunity for increased penetration of LPG among a section of households.

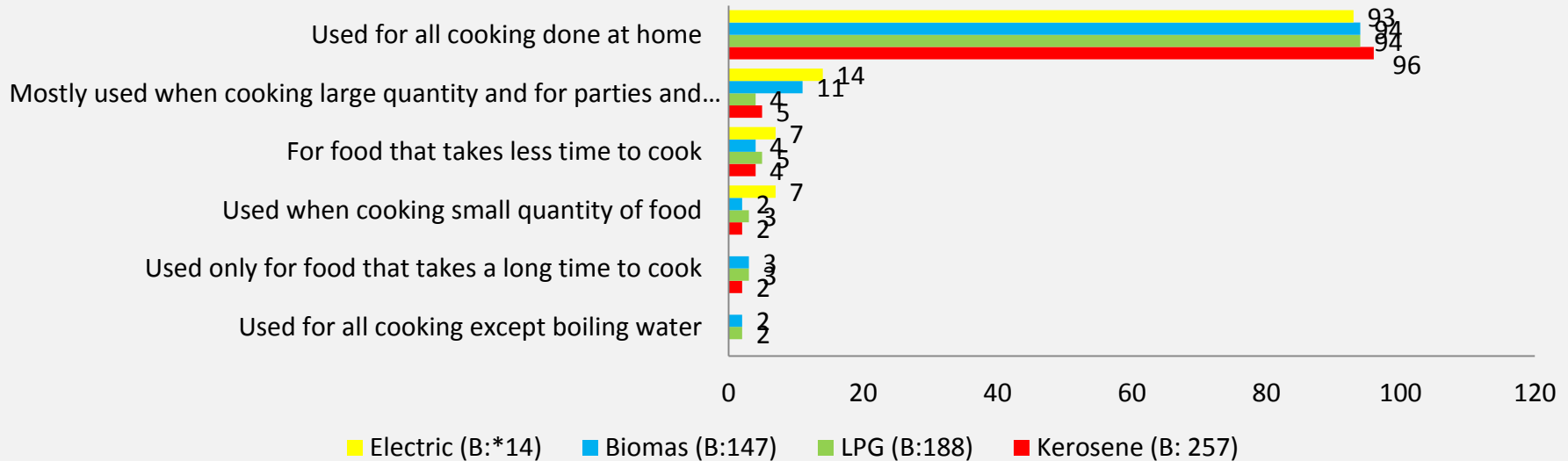
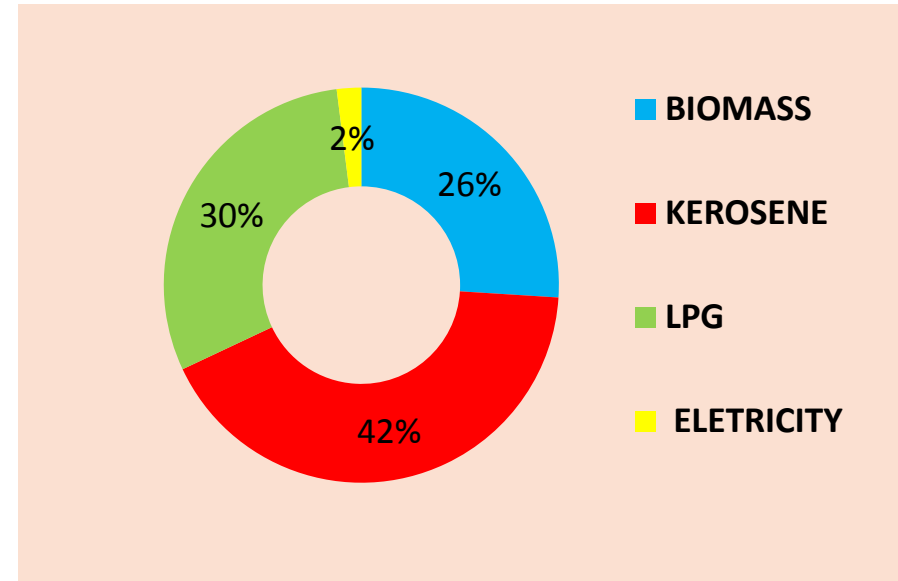
Cooking Fuel - USAGE					
	EVER USED	USED PAST 1 YEAR	REGULAR/CURRENT USERS	MAIN USERS	PREVIOUS METHOD
BASE	618	618	618	618	618
	%	%	%	%	%
Kerosene stove	93	79	59	42	33
Charcoal	61	36	19	9	8
Firewood	59	31	21	15	9
LPG cook stove/gas	55	42	34	30	7
Electricity (Electric cooker/hot plate etc)	44	22	14	2	7
Saw dust	10	1	1	0	0
Fixed mud stove	6	4	2	0	0
Others	3	3	1	1	1

Q: Which of the following cooking fuel type have you ever used, currently using , use most often and used previously but no longer using?

COOKING FUEL – PRIMARY USAGE

• CURRENT USAGE CLASSIFICATION

- ❖ Biomass include: Firewood, Charcoal, Saw dust
- ❖ All the cooking fuel types used are used for all cooking done at home.



Q: Which of these describe how you use each of these cooking fuel type?

COOKING FUEL- IMAGERY

- ❖ When respondents were asked about their perceptions of LPG as a fuel, on the positive side, more of those responding expressed the view that LPG is “a clean and fast cooking source of energy”. Also, significant is the fact that “Ease of use” was also mentioned by several respondents.
- ❖ The high points of Biomass lie mostly on its economical value. It is affordable and good for cooking large quantity of food.

Cooking Fuel - IMAGERY				
	BIOMASS	KEROSENE STOVE	LPG (COOKING GAS)	ELECTRICITY
	%	%	%	%
Is good for cooking large quantity	43	18	13	5
Cooks fast	29	17	39	9
It is affordable	29	17	22	2
Is good for cooking small quantity	27	31	47	6
Is fairly priced	25	11	18	3
Burns cleanly	13	4	56	8
Easy to use	20	24	46	6
Easy to store	16	17	23	3
It is very safe	14	19	19	2
Easy to carry	12	21	29	3
Can be paid for comfortably	13	9	11	1
Always available in sales point	12	13	11	2
Easy to fix	9	9	15	2
Doesn't generate smoke	5	2	38	5
Does not harm the environment	5	4	13	1
Not harmful to ones' health	6	6	18	2
Distance of travelling to get it is close is not far/close by	7	6	5	1
Is good for heating the house	2	2	7	1
Is good for illuminating/lighting	3	2	4	0

Q: Which of these attributes do you think describes these cooking fuel types?

COOKING FUEL- PURCHASING HABIT

- **PURCHASE FREQUENCY**

- ❖ Firewood, Charcoal and Kerosene in that order are purchased more often on weekly basis.
- ❖ LPG is purchased more on monthly basis than others.

Cooking Fuel – PURCHASE FREQUENCY

	Total	Kerosene stove	LPG cook stove/gas	Firewood	Charcoal	Fixed mud stove	Saw dust	Electricity
BASE	618	257	188	93	54	*3	*2	*14
	%	%	%	%	%	Abs	Abs	Abs
Within one week	30	41	2	47	46	3	1	1
Within 2 weeks	11	17	5	14	7	0	0	0
Within 3 weeks	16	17	16	11	20	0	0	1
Within a month	22	17	35	10	20	0	1	7
Within 2 months	15	7	34	8	2	0	0	1
Within 3 - 6months	6	2	8	11	4	0	0	4

Q: How often do you purchase your cooking fuel type?



SECTION 4:

nielsen
.....

PERCEPTION OF LPG STOVES BARRIERS/TRIGGERS FOR ADOPTION

SPONTANEOUS ASSOCIATIONS - PERCEPTION OF LPG STOVE

Although strongly associated with negative connotations, non endorsement of usage by male head of household is a key barrier for non usage . Hence, it is suggested that campaign communication should also target this secondary audience as they wield strong influence over wives attuned to using LPG stoves .

ITS EXPENSIVE TO MAINTAIN FAST IN COOKING

COOKS FASTER IS FOR COOKING NOW

DOESN'T MAKE POTS BLACK,
BECAUSE IT DOESN'T SMOKE

IT IS FOR 'RICH' PEOPLE
FOOD

MONEY – THE MONEY YOU WILL USE TO REFILL THE GAS

IT WILL MAKE YOUR POT NEAT

NEATNESS

DEATH

FEAR

EXPLOSIONS

IT'S A MODE OF COOKING
NOW AND THAT IS WHAT
MOST PEOPLE ARE USING

I LIKE COOKING GAS, IT'S VERY FAST

STRESS TO REFILL,

'EXTRA CAREFUL'

CAUTION

DANGER

Risky (highly inflammable)

VERBATIMS - PERCEPTION OF LPG STOVE

I think of things like disaster that they do cause

*SEMI -URBAN MALES, Abuja
30 – 45 Years Old, C2*

Fast cooking

*URBAN FEMALES, Lagos
18 - 29 Years Old, C2*

That it is a flammable something. I will be scared

*URBAN FEMALES, Lagos
18 - 29 Years Old, C2*

When they talk about cooking gas, what comes to my mind is that it is for 'rich people', that's what comes to my mind.

*SEMI -URBAN FEMALES, Lagos
30 – 45 Years Old, C2*

The first time I ever heard 'cooking gas', I thought they were referring to gas for car like diesel

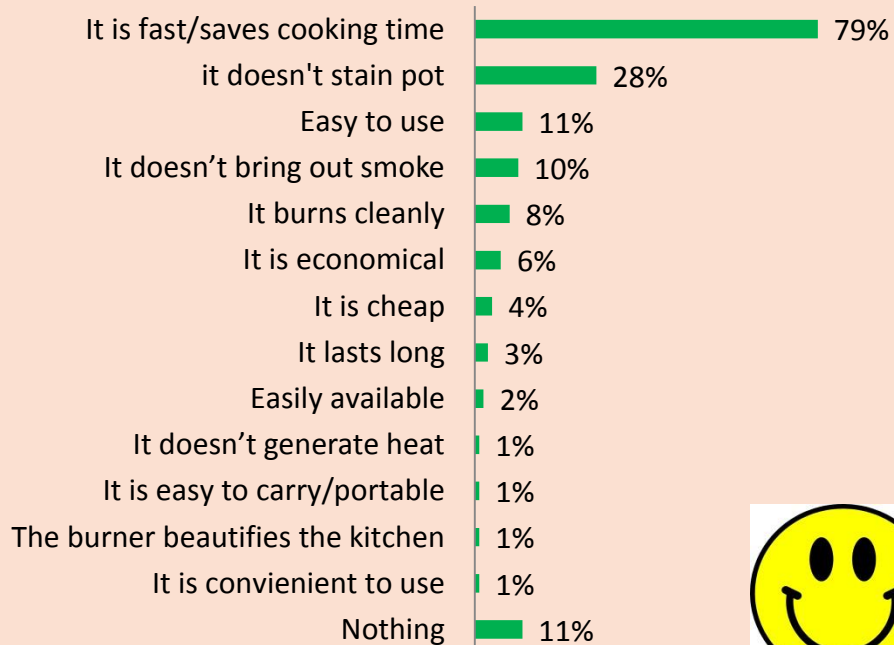
*SEMI - URBAN MALES, Abuja
30 - 45 Years Old, C2*

LPG USAGE IN HOUSEHOLDS

• BENEFITS & CONCERNS

- ❖ The major selling point for LPG is fast cooking and burns cleanly without smoke to stain the pots.
- ❖ On the concerns expressed, 53% expressed some fear that LPG was a dangerous and unsafe product because of its “explosive” nature. A further 6% indicated that it is expensive.
- ❖ There are not much gross negative association as the benefits far outweigh the a alleged fears about LPG.

Benefits



Concerns



LPG USAGE IN HOUSEHOLDS

- **PERIOD OF USAGE OF LPG**

❖ Usage of LPG in households is recorded to be over 12 months by 78% of respondents.

	Total	Male	Female	Lagos	Abuja	Urban	Semi-Urban
Base	212	65	146	136	74	91	118
	%	%	%	%	%	%	%
Less than 3 month	2	3	2	4	0	3	2
3-6 months	5	3	6	4	5	3	6
6 - 12 months	9	11	9	13	4	9	10
Over 12 months	78	82	76	77	80	80	76
Don't know/can't recall	5	2	7	2	11	4	6

Q: How long have you been using LPG?

LPG USAGE IN HOUSEHOLDS

- **TYPE OF LPG BURNER OWNED**

- ❖ The single burner is the commonly used type by the respondents.
- ❖ Overall, 63% LPG users have single burner gas cylinder popularly called camp gas. 26% have the 2-burner type of LPG cook stove.

	Total	Male	Female	Lagos	Abuja	Urban	Semi-Urban
Base	212	65	146	136	74	91	118
	%	%	%	%	%	%	%
Four Burners	9	6	10	7	11	10	8
3 burners	6	6	6	4	11	4	8
2 burners	26	34	23	23	32	30	24
Single Burner/ Camp Gas	63	60	64	69	51	58	66

Q: What type of LPG cook stove do you have?

LPG USAGE IN HOUSEHOLDS

- **USAGE FREQUENCY**

❖ Users of LPG use it on a daily basis.

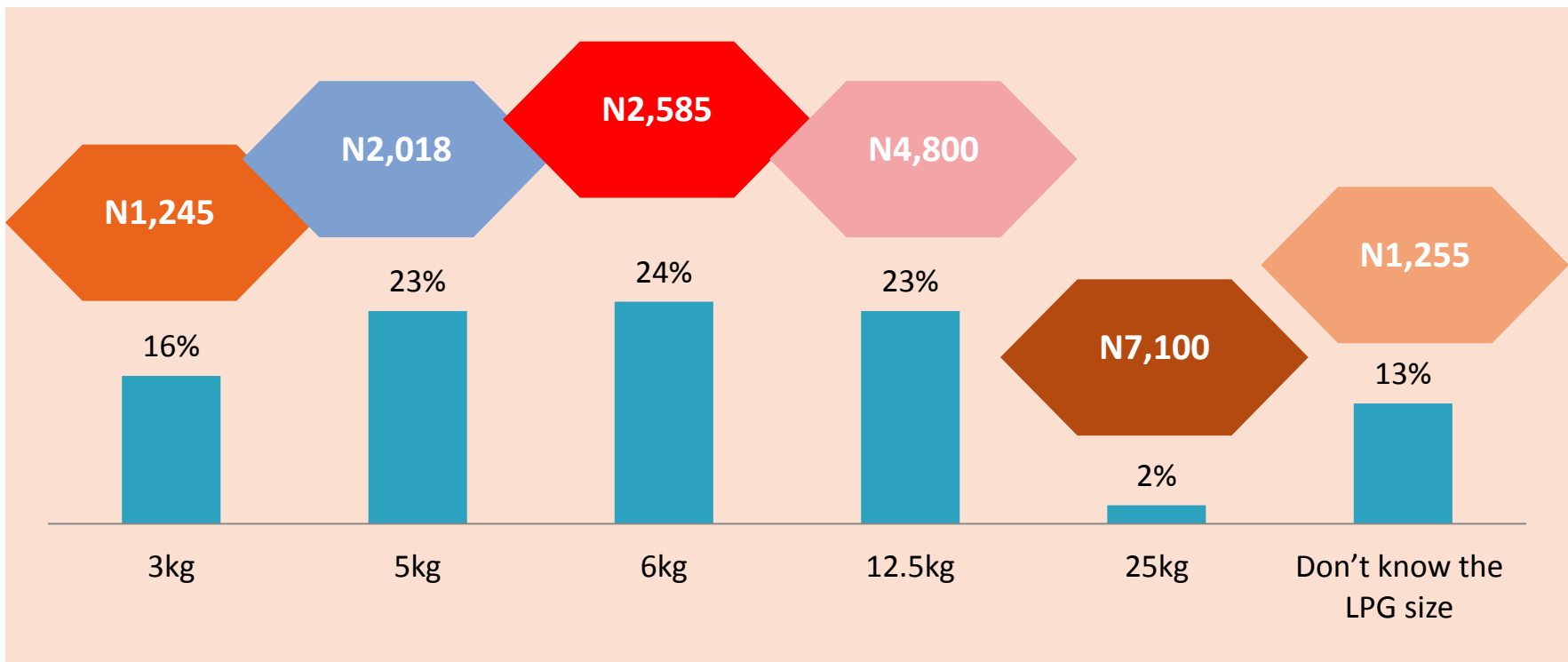
	Total	Male	Female	Lagos	Abuja	Urban	Semi-Urban
Base	212	65	146	136	74	91	118
	%	%	%	%	%	%	%
Daily	72	65	75	73	70	76	69
5-6 times a week	3	2	4	3	4	2	4
3-4times a week	16	17	14	17	12	11	18
Less often	9	17	6	7	14	11	8

Q: How often do you use LPG to cook in your household?

LPG USAGE IN HOUSEHOLDS

- **USAGE QUANTITY & PRICE**

- ❖ Overall, 5kg, 6kg and 12.5kg are the popularly used sizes.
- ❖ On prizes for refilling the gas cylinders, 12.5kg on average is sold for N4,800. 6kg is sold for N2,585 and 5kg is sold for N2,018.



Q: What quantity of LPG do you buy most often...and how much do you buy, please tell me about the last time you bought LPG?

LPG USAGE IN HOUSEHOLDS - PURCHASE

• PURCHASE LOCATION

- ❖ Street gas shops and vendors is the leading choice of purchase location.
- ❖ Petron station is the second highest purchase point for LPG.

	Total	Male	Female	Lagos	Abuja	Urban	Semi-Urban
Base	212	65	146	136	74	91	118
	%	%	%	%	%	%	%
Street gas shops/vendors	65	65	64	67	62	64	65
Petrol station	42	47	40	45	38	45	40
Gas plants	16	14	16	15	16	19	13
Home Delivery	4	3	4	4	2	6	2
Home service (someone comes to refill the gas once it is out)	3	3	3	3	2	5	1
Don't Know	5	2	7	3	9	5	5

Q: Where do you usually buy your LPG for cooking fuel from?

LPG USAGE IN HOUSEHOLDS - PURCHASE

- **PURCHASE LOCATION AVAILABILITY**

- ❖ When respondents were asked to comment on the ease of availability of gas, the overall response was that it is always available (71%).

	Total	Male	Female	Lagos	Abuja	Urban	Semi-Urban
Base	212	65	146	136	74	91	118
	%	%	%	%	%	%	%
Always available	71	72	70	74	65	67	72
Sometimes available	23	21	23	21	26	24	22
Not readily available	7	7	7	5	9	8	6

Q: How will you describe the availability of LPG in your purchase location?

SAFETY ISSUES RELATED TO USE OF LPG

• SAFETY ISSUES ASSOCIATED WITH LPG

- ❖ Overall , 30% have not experienced or even heard about any safety related issue while using LPG as cooking fuel most especially in Abuja.
- ❖ More people in semi-Urban reported to have personally experienced safety issues while using LPG.

	Total	Male	Female	Lagos	Abuja	Urban	Semi-Urban
Base	222	57	164	162	59	74	147
	%	%	%	%	%	%	%
I have personally experienced a safety issue with LPG	22	23	21	22	20	15	25
I know someone who has experienced a safety issue with LPG	18	25	15	22	5	18	17
I have heard about a safety issue with LPG through media, word of mouth, etc	31	23	34	36	17	35	29
I have not heard or experienced a safety issue with LPG	30	30	30	20	58	32	29

Q: Have you experienced any health issue as a result of using LPG?

SAFETY ISSUES RELATED TO PURCHASE OF LPG

- **HEALTH ISSUES ASSOCIATED WITH LPG PURCHASE POINT**

- ❖ As can be seen, nearly half of the respondent overall have no safety concerns with LPG purchase location especially in Abuja.
- ❖ More respondents in Urban centers reported that they only go to specific locations where they know the LPG supply is safe.

	Total	Male	Female	Lagos	Abuja	Urban	Semi-Urban
Base	222	57	164	162	59	74	147
	%	%	%	%	%	%	%
I have no safety concerns about where I obtain LPG	45	44	45	41	56	36	49
I have some safety concerns about where I obtain LPG	17	18	17	20	8	16	18
I have serious safety concerns about where I obtain LPG	10	12	10	11	8	5	13
I only go to specific locations for LPG where I know the supply is safe	28	26	29	28	29	42	21

Q: Have you experienced any health issue as a result of where you purchase your LPG from?

- Affordability of LPG stove is a likely trigger to consider usage.
- Effective education of usage and management of LPG stove is necessary to change mind set. Showcasing this through an audio – visual medium will not be a bad idea.

BARRIERS TO USAGE

- Fear of safety (*especially target audience with young children*)
- Influence of spouse
- Poor knowledge about the product (do not know the dynamics of usage – how to ignite/turn it off etc....).
- Bad experience of others / third party sources
- Initial cost of acquisition (stove & cylinder and other accessories)
- Disallowed by some landlords / house owners
- Relatively expensive cost of continuous usage (refilling) - compared with biomass fuel & kerosene. (some)
- Far distance to place of purchase (semi – urban Mainly)
- Perception that gas chamber / cylinder can explode due to heat from the sun
- Unscrupulous retailers cheat by dispensing a greater proportion of air than LPG when selling to customers.
- Gas can finish without warning during cooking;
- Notion that users must always have a back up cooking stove (any type) as the gas can get finished without notice since there is meter to determine usage
- Cannot be bought in small portions

CONSIDERATIONS FOR USAGE

- Ease of affordability
- Effective education on usage – so as to avoid mistakes that can lead to gas explosion e.g. knowing when to change gas hose, service burners,
- Use of tough / thick textured materials for LPG stove accessories to mitigate possible leakage that can result in explosion if they are thinner in texture and easy to perforate and give rise to gas leakage e.g. tougher rubber hose that connect the gas chamber / cylinder and the stove.
- Avoid recycling refillable rusted and leaking gas cylinder / chamber
- Availability of transparent gas cylinder (to enable user to know level / quantity of gas in cylinder)
- Sanction / rid unscrupulous retailers who dispense air instead of gas when selling
- Gives the user a unique (positive) image .

LPG NON USAGE IN HOUSEHOLDS

• REASON FOR NON-USAGE & LAPSSED USAGE

- ❖ For both non users and lapsed users, most of the reasons are centered around Price and LPG fuel itself especially the safety concern.

	LPG – BARRIERS TO ADOPTION			
		LAPSED USAGE	NON- USAGE	
		%	%	
Awareness (8%)	I am not aware of it	3	2	Awareness (6%)
	I don't know where to buy	2	1	
	I don't know how to use it	5	3	
Availability (15%)	It is not available in my area	2	0	Availability (6%)
	Few people sell it so most times I don't get to see it	1	1	
	I don't have the cook stove/cylinder	10	5	
	The filling point is too far	3	0	
Affordability (58%)	It is too expensive	54	44	Affordability (48%)
	I can't afford the cylinder or the cook stove	9	4	
Accessibility Barrier (7%)	Unreliable access at purchase points	1	0	Accessibility Barrier (3%)
	I don't have space in my house for it	5	2	
	It is not allowed in the house where I live	2	1	
Product usage (37%)	It burns out faster	3	0	Product usage (23%)
	It is dangerous/unsafe	27	15	
	It causes fire	15	4	
	Cylinders are incompatible with other stoves	1	0	
	The quantity is too small	1	0	
	It is not sold in small quantity	2	1	
	I cannot tell when the cylinder will be empty	3	2	
Pushback or discouragement (20%)	Landlord	1	0	Pushback or discouragement (11%)
	Spouse	1	1	
	Children	17	9	
	Parent	1	1	
	Family Tradition of biomass cooking	1	0	

Q: Why are you not using LPG?

LPG NON USAGE IN HOUSEHOLDS

• ADOPTION INTENT

- ❖ Interestingly, when asked whether or not the respondents would consider using LPG if they had the opportunity and all things being equal, 68% overall (on top 2 boxes) of the respondents said they were likely or very likely to do so!
- ❖ Intent is more in Lagos (80%) than Abuja (54%) on top 2 boxes.
- ❖ This is a good indication of favorable disposition towards LPG usage.

	Total	Male	Female	Lagos	Abuja	Urban	Semi-Urban
Base	416	105	311	227	188	121	294
	%	%	%	%	%	%	%
Very likely	16	12	17	21	10	27	12
Likely	52	56	50	59	44	48	53
Indifferent	17	14	17	9	26	8	20
Unlikely	7	8	7	6	8	9	6
Very Unlikely	6	8	6	1	13	7	6

LPG NON USAGE IN HOUSEHOLDS

- ADOPTION INTENT : POSSIBLE UPTAKE TIME

- ❖ Even though most of them (33%) are not sure of uptake time, 39% would adopt LPG in the next 1 year or more. While 28% are likely to adopt LPG in less than 6months time.
- ❖ Earlier LPG uptake time is expressed more by females especially in Lagos.
- ❖ Abuja residents expressed more uncertainty in LPG adoption time.

	Total	Male	Female	Lagos	Abuja	Urban	Semi-Urban
Base	416	105	311	227	188	121	294
	%	%	%	%	%	%	%
Within a month	12	8	14	15	9	12	12
Within 3 months	8	10	8	10	6	5	10
Within 6 months	8	8	8	7	9	6	9
Within in a year	18	20	17	17	18	17	18
In more than a year	21	18	22	29	12	31	17
Not Sure	33	36	32	22	46	29	34

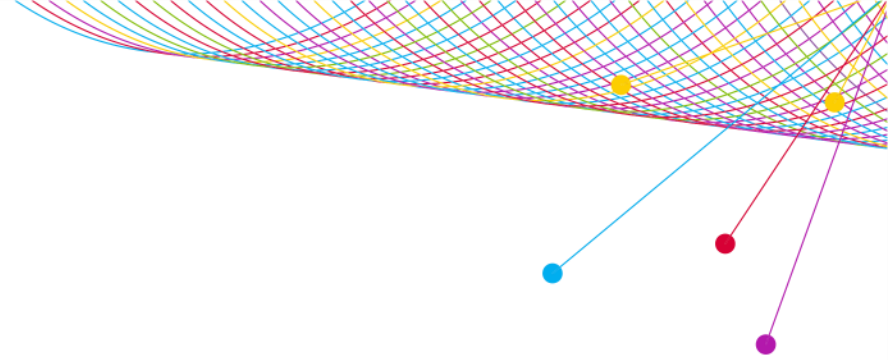
IMAGERY OF LPG USERS



- Affluent look, hence can afford LPG
- Corporate outlook / Neat appearance / clear skin
- Looks educated/enlightened
- Lives a busy lifestyle, hence;
 - would require food to be prepared on time
 - Does not have time to scrub pot
- Lives an easy / stress free life



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SECTION 5;

INFORMATION & ENTERTAINMENT SOURCES SOCIAL COMMUNITIES & ORGANIZATIONS

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INFORMATION & ENTERTAINMENT SOURCES

The internet is the key source of information. Followed by the TV , then Radio

- The **internet** is the most popular primary source of information / entertainment across board
 - Usually **accessed through their mobile smart phones** - considered a personal 'on – the – go' device. It is accessed daily any where at any time. Keeps them abreast with information from all over the world. Affordability of data (due to free data bonus given upon recharge of air time – at least 100%) has greatly enabled this .
 - **Social media sites, forums and blogs** are mainly visited . They include; **Facebook, instagram, whatsapp , Skype, Google, Twitter. Naira land (forum) , Linda Ikeji's blog , Naij.com**
- Next is the **TV** – favored due to its audio- visual attributes. . Accessed mainly at homes.
- Thereafter is the **radio**. Mainly accessed via mobile phones among the majority . Also via transistor radios – (*typical among the Hausa speaking populace who love listening to the BBC Hausa service.*)
- **Others sources** patronized but at a lower level include;
 - Subscription **to telecom service provider**
 - **Newspaper / magazines/ journals**
 - **Seminars organized by churches**
 - **Word of mouth communication/ information**

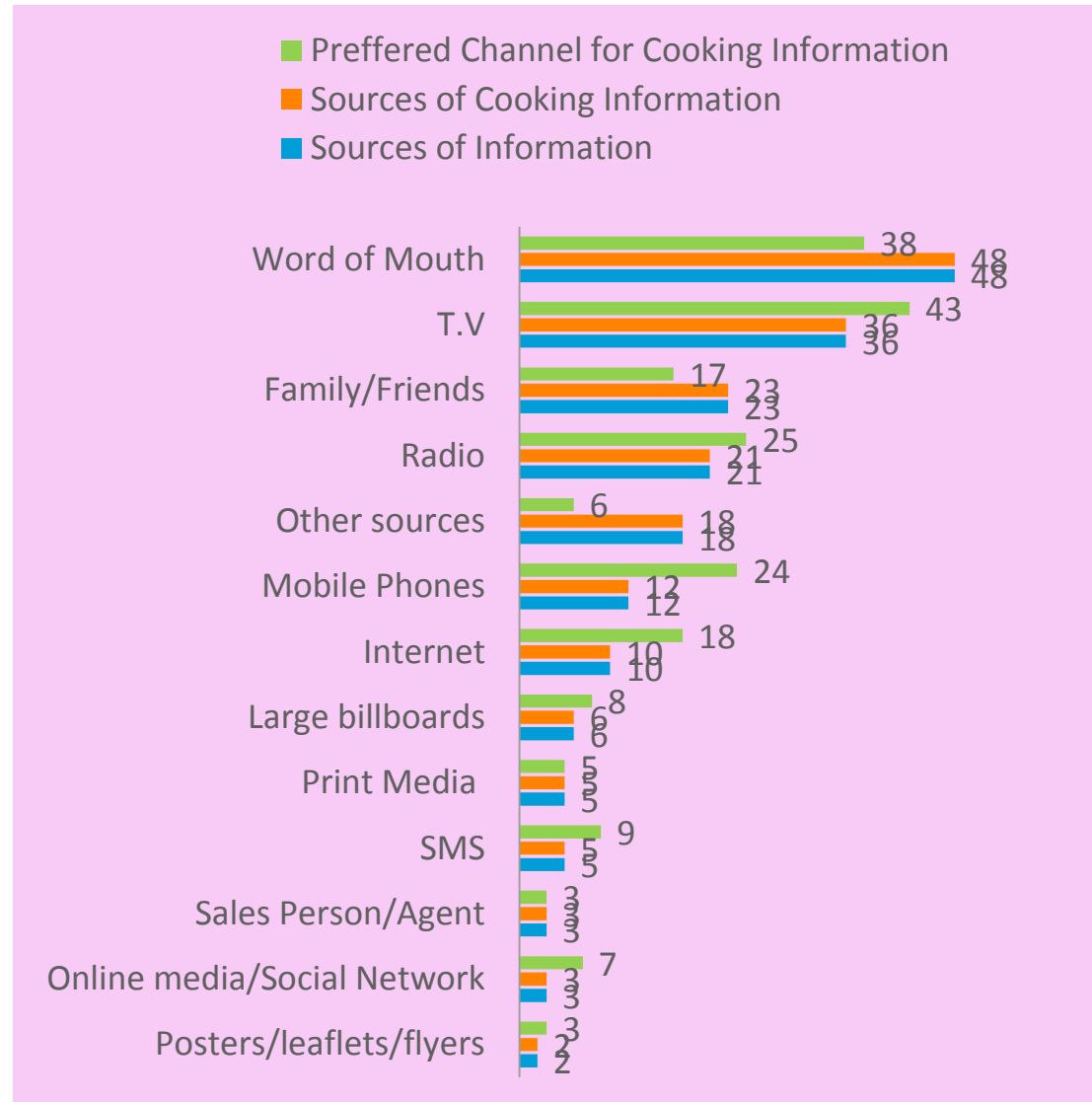
MEDIA USAGE- SOURCE OF INFORMATION

• SOURCES AND PREFERRED MEDIA FOR RECEIVING COOKING INFORMATION

❖ Word of mouth is the major source of receiving information generally by the respondents as well as the main source of receiving cooking information.

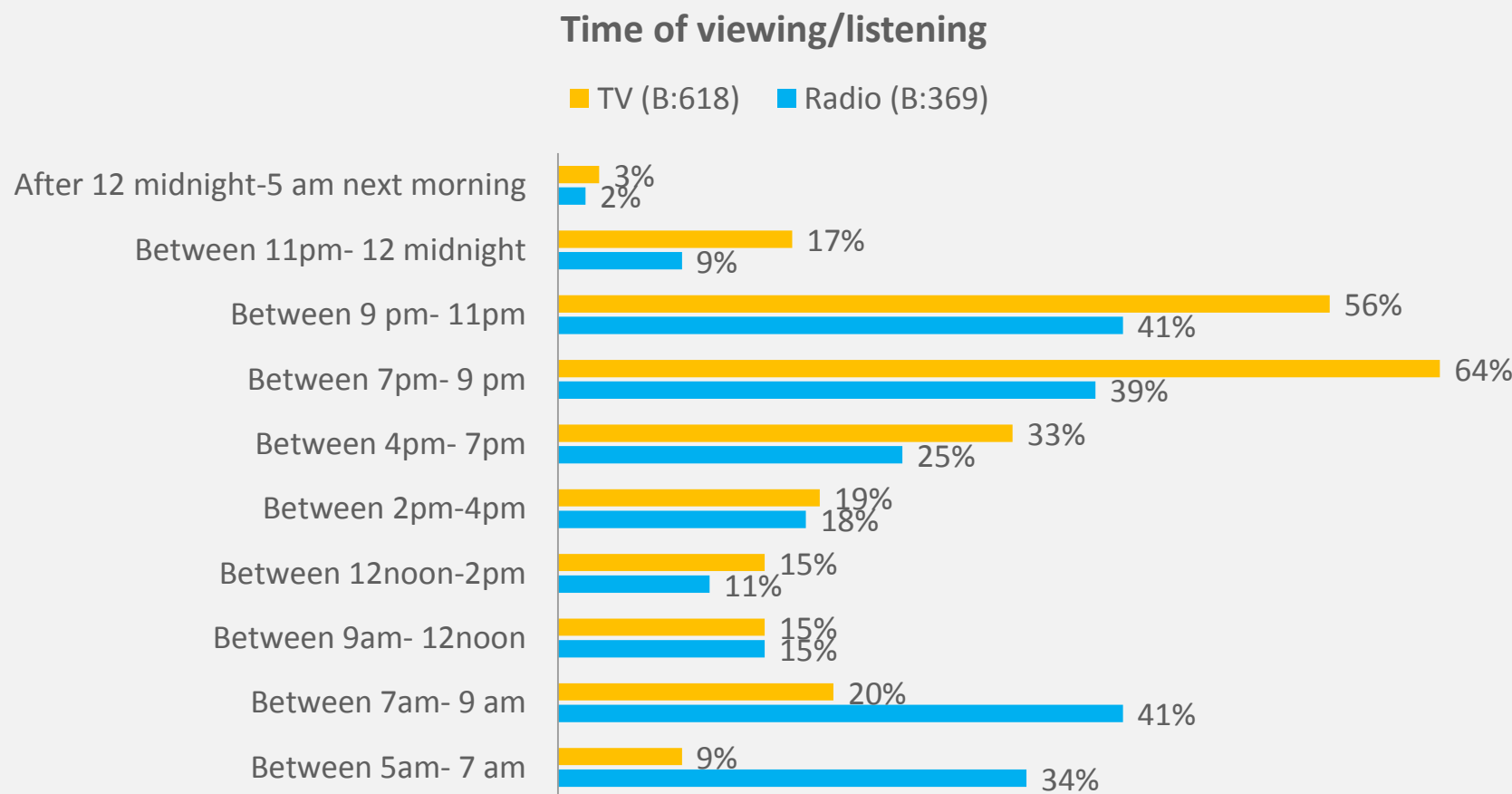
❖ However, on preferred channel for receiving regarding cooking, Respondents are suggesting:

- TV (43%)
- Word of Mouth (38%)
- Radio (25%)
- Mobile phone (24%)



MEDIA USAGE – TELEVISION & RADIO

- ❖ For the respondents that watch TV, the prime time for watching of TV: Between 7pm-9pm (65%) and Between 9pm – 11pm (56%).
- ❖ For Those that listen to radio, the prime time for listening: Between 7am – 9am (41%) and 5am – 7am (34%).



MEDIA USAGE – MOST OFTEN TV STATION

- ❖ AIT has the highest visibility especially in Abuja. Same with NTA.
- ❖ Africa Magic is the second highest Channel viewed especially by females in Lagos.

	Total	Male	Female	Lagos	Abuja
Base	618	166	451	359	256
	%	%	%	%	%
AIT	19	18	20	9	33
None in particular	11	9	12	9	14
African magic	10	5	12	12	7
NTA	10	10	10	4	19
TVC	7	5	8	12	1
Channels TV	5	8	4	5	5
LTV	5	4	5	8	0
Zee World	5	2	7	4	7
Galaxy	4	2	5	6	1
ONTV	4	4	4	7	0
Itv	2	2	2	1	2
Code 34	2	2	2	3	1
Supersport	2	7	0	3	0
Arewa TV	1	1	1	0	2
Emmanuel Tv	1	1	1	0	2
MITV	1	1	1	2	0
Nat geowild	1	1	1	1	0
ORISUN TV	1	1	2	2	0
Sound city	1	2	1	1	1
Wazobia TV / Wazobia Max	1	1	1	1	0

MEDIA USAGE – TELEVISION PROGRAMS

- ❖ News programs enjoys highest viewing time followed by Movies.
- ❖ Males are more inclined to news program especially in Abuja while female are more inclined to Movies especially in Lagos.
- ❖ This seem to align with the stations/channels watched/viewed.

	Total	Male	Female	Lagos	Abuja
Base	618	166	451	359	256
	%	%	%	%	%
News	28	39	24	21	37
Nothing in particular	19	13	22	20	19
Movies / Home video/ Films	14	7	16	18	8
Jenifa's diary	4	2	5	3	6
Super story	4	2	4	2	7
Football	2	6	0	3	0
King Hearts	2	1	2	0	4
Big brother Nigeria	1	1	1	1	1
Cartoon	1	1	1	1	0
Documentary	1	1	0	1	0
Kakaki	1	2	0	0	1
Music	1	2	1	2	0
Owuro la wa	1	1	1	1	0
Religious programme	1	1	1	0	2
Soap Opera	1	0	1	0	1
Sound city	1	1	1	1	0
Sport / Sport xtra	1	5	0	2	0
Young dreams	1	1	1	1	1
Your view	1	1	1	2	0

Q: Name 5 TV program you watch regularly?

MEDIA USAGE – MOST OFTEN RADIO STATION

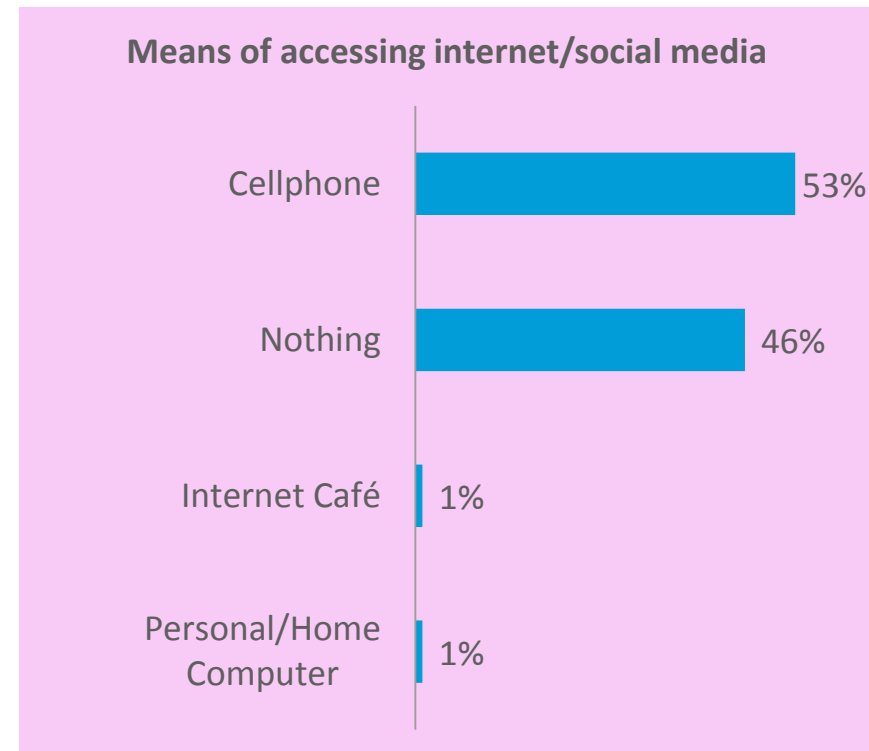
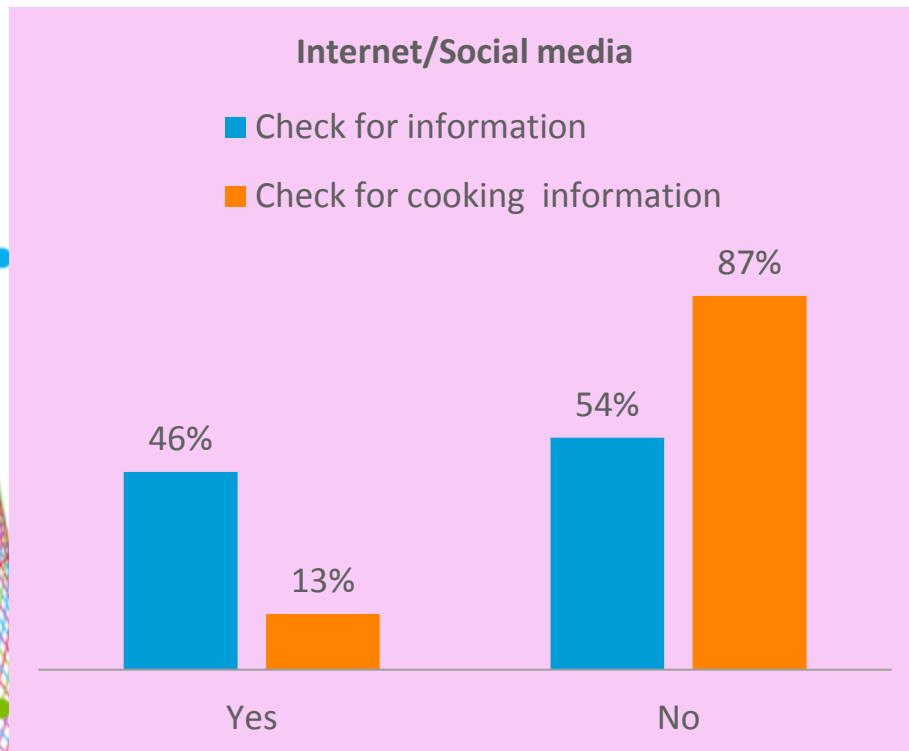
- ❖ Wazobia FM has very high listenership followers across both gender but especially in Abuja.
- ❖ Radio Lagos is listened to more by females in Lagos.

	Total	Male	Female	Lagos	Abuja
Base	618	166	451	359	256
	%	%	%	%	%
None in particular	40	32	43	43	36
Wazobia FM	11	10	11	3	21
Radio lagos	10	7	11	17	0
Faaji FM	7	9	7	13	0
Bond FM	4	2	5	8	0
Capital FM	3	2	3	0	6
Cool FM	3	7	1	2	4
Rhythm	3	1	3	2	4
Classic fm	2	3	2	2	4
BBC Radio	2	3	1	0	4
Brilla FM	2	5	0	2	1
Hot FM	2	2	2	0	4
Love FM	2	2	2	0	5
Ray power	2	3	1	2	2
Eko FM	1	2	1	2	0
Grace FM	1	2	1	0	3
Radio Continental FM 102.3	1	1	0	1	0
Naija FM	1	2	1	2	0
Top radio	1	2	0	1	0

Q: Which Radio station do you listen to most often?

MEDIA USAGE – INTERNET & SOCIAL MEDIA

- ❖ 54% of the responded depend on and use internet and social media to get information. But only 13% use the internet and social media to get cooking related information.
- ❖ Cellphone is the major tool for accessing the internet at 53% mention.



Q: Do you check social media for information? ... Do you check social media/internet for information about food, cooking and cooking materials?
Q: How do you access social media/internet?

MEDIA USAGE – INTERNET /SOCIAL MEDIA SITES

- ❖ Facebook has the highest visit mention across all demographics.
- ❖ Males visit google site more especially in Abuja.

	Total	Male	Female	Lagos	Abuja
Base	618	166	451	359	256
	%	%	%	%	%
None in particular	49	22	59	49	49
Facebook	32	43	28	33	30
Google	7	13	5	4	12
Instagram	2	2	2	2	1
Whatsapp	2	1	2	2	2
Naij.com	1	1	0	1	1
Goal .com	0	2	0	1	0

- **Community Youth Associations** wield strong influence within communities in urban locations .
- However, the majority of the general populace interacted with belong to groups in their places of worship – church mainly- such as *men's group, women's group, youth group, young female group, singing group etc.*
- **Few belong to the following ;**
 - **Ethnic / tribal social groups** (*comprising residents of same tribe and hail from same village / place of origin etc.*)
 - **Local professional associations / bodies** (*e.g. tailor/ hair dressers' association etc.)*
 - **Independent social groups ; organized by individuals**
- Key existing social / community organizations within communities include;
 - **LCDA - Local Community Development Association;**
 - ✓ It is instituted by the government and present In urban locations mainly. Hence, highly recognized and effective.
 - ✓ It is made up of several **sub groups** which are;
 - ✓ **Elders' forum,**
 - ✓ **Women Association**
 - ✓ **Youth Association,** (*which serves as the operational arm of the LCDA.*) .

- **COMMUNITY YOUTH ASSOCIATIONS ARE USUALLY MALE DOMINATED.**
 - **FEW AMONG THE SECONDARY TARGET AUDIENCE (Males) SPOKEN WITH ARE MEMBERS.**
-
- ✓ The Youth Association could be very active / vibrant and influential as they are capable of spearheading laudable community programmes / events.
 - ✓ The association seek the support of corporate organizations (multinationals) to fund / carry out projects that focus on the social welfare and economic wellbeing and development of the people from the community such as ;
 - ❖ Building a block of classrooms
 - ❖ Provision of scholarships to youths in the community
 - ❖ Provision of portable water (borehole)
 - ❖ Free enrolment for terminal exams for secondary school students.
 - ✓ On the other hand, they could help Corporate bodies to create door to awareness of their products in their community by sensitizing community members of such campaigns.
 - ✓ Among secondary target audience spoken with , a very small proportion belong to the Youth Associations in their communities .

VERBATIM - SOCIAL COMMUNITY / ORGANIZATIONS

“Infact, without the youth the CDA cannot even stand because the CDA also make use of the youth ... Government recognize the CDA ,and they (CDA) cannot do anything without the youth”

“In our own case a lot of youths we have empowered them through the contribution we get from other youths, other people and then some companies around us. There was a time we wrote to Coca-Cola to support us in our activities , they came around that they built the classrooms for the community , and there was a time , another organization came to increase the number of classrooms and all these things are the activities of youth. The way they see us together ,we group ourselves and tell them our needs , at times some of our youths , they sponsor them , they give them scholarship to schools , and these things has really helped us ,because em it has make the youth stronger , we all work together in one accord , we do things together , it has brought about unity , so those are the benefit we see”

“Because some churches whenever they want to hold programme around them , they always come to the youth ,they seek for their approval ...At times they hold crusade , and at times they come for medical check up and their welfare package , so the youths will go around and call people out , to grace their occasion”

“... any company that is bringing a new product , it’s an opportunity for them to quickly reach out to people like that go door to door to their own various home and tell them about the product ,you understand because every house must be represented with that company, so that is why, we that are experience youth association ,we are like a kind of an ambassador now to any organization that wants to come into our own organization to seek for the youth audience ,or the elders audience or the women audience ...”

Males, 30 – 45 years , DE, Urban, Lagos.

“ ‘The Concerned Youth Of Abaji’ we protect the interest of our people like empower program that is going on, you know the list that just came out (of those who were selected) the list is almost one hundred and forty nine (149)most of the people whose names are shortlisted are not from this town, so this is where most of the people in authority know about our existence”

Males, 30 – 45 years, C2, Semi – Urban , Abuja

SOCIAL COMMUNITY / ORGANIZATIONS - 2

- A vast proportion of the target audience (irrespective of gender and location) belong to groups in their religious centers (place of worship) - church mainly .

- *“you know know we are Anglican , so mother union ,so as a married woman i must belong to mother’s union “*

Female, 18 – 29 years, C2, urban - Lagos

- *“ You know me am a Muslim, I can say like the Christians, they go to such meetings, they do attend a lot of associations ”*

Ethnography, Female, DE, 18 – 29 years , Urban, Abuja

- Benefits received as members centers mainly on; welfare and social support in times of need / celebration , knowledge sharing / acquisition , capacity building and networking.

“the group I mentioned is church group, we share many things, enlighten people about many things. ..., if any one of use wants to write exam and doesn't have enough to pay for the fees, we have to assist you and life will not be one sided, you still have to move on, no matter what..”

Males, 18 – 29 years, DE, Semi – Urban , Lagos

“We advice each other pertaining the situation of life, or someone have problem, or seeking for advice on what someone is about to do is it good or not..”

Ethnography, Female, DE, 18 – 29 years , Urban, Abuja

“ I ‘m in the women group...They do assist , maybe you have a party. they will come or they will give you gift” .

” Females, 18 – 29 years, DE , Semi Urban , Abuja

- Some belong to ethnic / tribal social groups in their community . Others include Local Professional Associations, as well as Gender / Age based Independent Social groups .
- Benefits received are same as previously mentioned.

“Actually, they have make me exposed because I have self confidence when it comes to addressing issues publically ..”

Males ,, 30 – 45 years, C2 , Semi – Urban, Abuja

“for example if one of the member have ceremonies like wedding , so we would take some responsibility of the wedding, we will join hands together If we go together and we have gift that we want to present, so we will present it on behalf of the meeting”

Females, 30 – 45 years, DE, Urban Abuja

“I’m in group of tailor ... If there is any conference you contribute money , or this N200 they will now share it for everybody” .

Females, 18 – 29 years, DE , Semi Urban , Abuja

“ I have some guys from around or you can just put some guys together and call it 'Young shall grow', every Sunday we just meet, for the guys that always come to meeting we have Jerseys...we have fun, if someone is doing birthday, we can just contribute money and give to him – to cheer him up ..”

Males, 18 – 20 years, DE, Semi – Urban, Lagos

“ they teach us about the way we attend to customers, the way we do our hair,the prices we give to customers and how to make your shop neat. They still t each hair styles that other people have not seen it, we do it, we will be able to teach others ...”

Females, 18 – 29 years, C2, Urban , Lagos

“ Yes, like if you have problem, like sickness, they will now discuss and raise some money for you to buy drugs ”

Females, 30 – 45 years, DE, Urban, Abuja

Organization / Social groups working within communities with focus on the economic wellbeing of people mentioned include a female focused NGO . As well as the Church .

NGO BASED IN KADOKUSHI; (Mentioned in Abuja (Urban))

- Focus was on **motivation and enlightening women on business ideas**. They encouraged several women in the community to start their own business. This organization is well respected as they succeeded in making positive impact in families in the communities through the female heads of households. This took place about more than 10 years ago.

“They have visited us, and enlightened us on our business, that we should be serious with our business ...they draw the attention of people, like for example now those that were not doing any business before, now they have all started engaging themselves in business, because of the enlightenment. They told us that ; ‘even if you don’t have capital, if you don’t honor your husband, then you should start respecting him so that you can get something from him to start your business’ . And since then our ladies have started doing business ...”

“when they came, they let us know there are bunch of businesses out there, unless if you are not ready to work..”

Ethnography, Female, 18 – 29 years , DE, Urban, Abuja

Religious organizations (Churches mainly) ;

- Organize knowledge sharing forums on community peace /wellbeing among community members

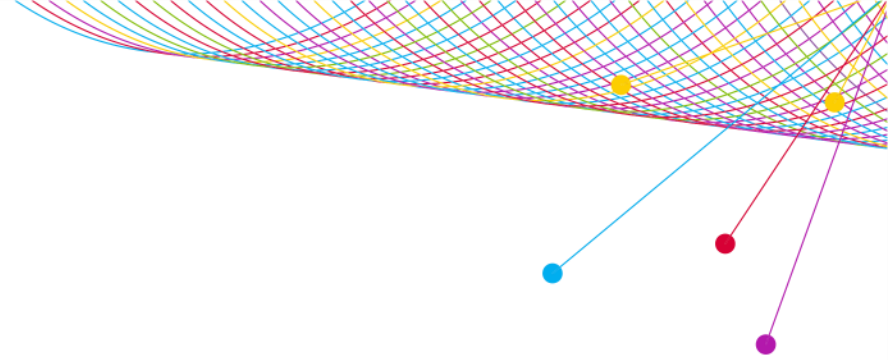
“If they come like during the weekend, when ever they want to come they will announce and say so so people will come on so so (start date) to so so (end date), so people should come to the church, so people will gathered, they will come and discuss with us “

Ethnography, Female, 18 – 29 years , DE, Urban, Abuja

Specific community celebrations or reoccurring meeting/gatherings of significant mention are **Annual Street Carnivals** and **Monthly Landlord Association meetings**.

Both play no role in the lives of respondents.

- **Street Carnivals** ; A phenomenon in Lagos. Usually organized by resident youths of streets - mainly in low end neighbourhoods. Organized mainly at the end of the year. Characterized by music, dancing and in some cases, marred by fighting / violence . None among respondents spoken with identify with this community celebration as it plays offers no positive benefit .
- **Landlords association meetings** ; held among house owners in streets / neighbourhood with regards to the infrastructural development , security and general wellbeing of the locality / neighbourhood.
 - Typically held once in a month, membership eligibility is by owing a house in the locality
 - The large proportion of respondents spoken with are tenants



SECTION 6;

MARKETING ACTIVITIES

MARKETING ACTIVITIES - 1

Significant mention was in Urban location in Lagos. Campaign sponsored by Oando – an LPG marketing company. Training and education about product was conducted in local language

- Although there were few mentions of marketing campaigns for clean cook stove, mainly in Lagos – urban, worthy of mention is the campaign for clean cook stove by Oando (an oil and gas marketing company) – in conjunction with the Local Government Authority about two years ago at Isheri Olofin LGA.
- 3Kg gas cylinders were distributed free in the local government council. The aim was to encourage usage by giving free cylinders to mitigate the issue of high initial cost of purchase.
- Thereafter, education on product usage was also given in local language to enable optimum product benefits among users and to mitigate chances of risk in usage.



3Kg gas Cylinder

“It was Oando that sponsored that programme through local government. They were lecturing them on how to use it ... They did everything on how to on it (put it on) and how to off it (put it off), how you need to be ready to cook before you on it (put it on)”

“...It was in Yoruba language ,our area is rural area , they lectured them on how to use the gas and how to refilled the gas”

Community Leader, Urban, Lagos

MARKETING ACTIVITIES - 2

- Other mentions of moderate significance was from the Semi Urban in Abuja. A type of Kerosene stove with higher fuel efficiency introduced by a body (*the name could not be recalled*) to the community .
- Usage experience from members of the community revealed that the process of igniting it was cumbersome.
- Although it was claimed that some still use it till date, most were not encouraged to continue usage , but switched back to charcoal – because it is easier to ignite / use.

“...they have come but I have forgotten it (the organization) , there is a stove they brought it doesn't make use of much kerosene but you have to pump it , and you will even be tired, you will not pour the kerosene directly, so you will now cover it and start pumping it , is very blue ... no red (flame) in it ...”

“ am not using it because you must pump pump and pump , it will first bring yellow , later it will bring blue colour ...It has long process , like if you want to pour kerosene you must use funneland you use your hand to start pumping it.
”

“ Yes some are using it up till now ...”

“ ...there are people that have it but now they are not using it again” .

“The time they brought it people are using it , but now that there is charcoal that is what people are using “

- Other mention, but of less significance is not a marketing campaign but awareness of some form of clean cook stove powered with spirit that was seen with an individual - who received it as a gift from a foreigner .

“....a girl brought a small stove like that , I said ;‘what are you doing with this kind of small stove ?’ , she said she normally use it to cook her indomie (brand of noodles). it can cook like two packs of indomie and boil water , just for a small quantity of food . I asked ;‘ what do you put inside again?’ , she said she used to pour spirit into it, so I saw her using it , and she was using it very fine , and there was no complain about it ...”

“.... it was just like a lamp , but it has a sit where you will place your kettle or small pot. so you will just pour spirit into the can meant for it and you close it and it will start using it ...”

“ ..she said she got it from her father who used to work with Pepsi company , and that the father got it from one of the foreigners...”

Males, 30 – 45 years, DE, Urban, Lagos

Another mention – also of less significance is the claim by one of the respondents of a marketer / vendor who displayed and demonstrated a unique clean cook stove powered by a thick and creamy fuel , as seen by a roadside – in Lagos .

“ But it was an imported good , the man was even selling it, I know of a brother that bought that particular product ,and you know it was packaged along with 12 cans in the carton. So these cans has fuel but it was like the thing (fuel) is a cream...thick thick cream...so you will use by pouring it inside the container , you understand , so you can now light it (put it on) and start , ”

Males, 30 – 45 years, DE, Urban, Lagos

THE ROUTE OF LOCAL LANGUAGE - THE WAY TO GO

- It arouses attention / interest
- It connotes that the product advertised is targeted to the people at the grass root level (i.e. The target audience) .
- It ensures detailed /quick understanding and resonance – hence needless to interpret.
- Dissemination becomes faster - further spread via Word of mouth

“is effective it makes those that doesn't understand English to know what they are talking about .. And you understand in details “

Males, 30 – 45 years, DE, Urban, Lagos

“they say language is power by the time I hear you speaking I will say “ Wow! this person is my person and we are from the same place. Let me even listen to what he / she is saying’ “

Opinion Leader, Urban , Abuja

“ bringing things to the local level that means the product must have benefit for them”

Ethno, Females, 18 – 29 years, C2, Urban , Lagos

“ To see purpose of campaign advert is to makes the community or people to be aware of what you are telling them about or what you brought to them ...”

Males , 18 – 29 years, C2, Semi-urban, Abuja

“ They should do it in Hausa and English language ...even if you are not hearing (do not understand) your son is hearing (understands) and he will interpret it to you .

Females, 18 – 29 years, DE, Semi – Urban, Abuja

The background features a series of concentric, curved lines in blue, green, yellow, and red, creating a sense of depth and movement. Several small dots in blue, green, yellow, and red are scattered across the upper half of the image, connected by thin lines.

nielsen

THANK YOU!