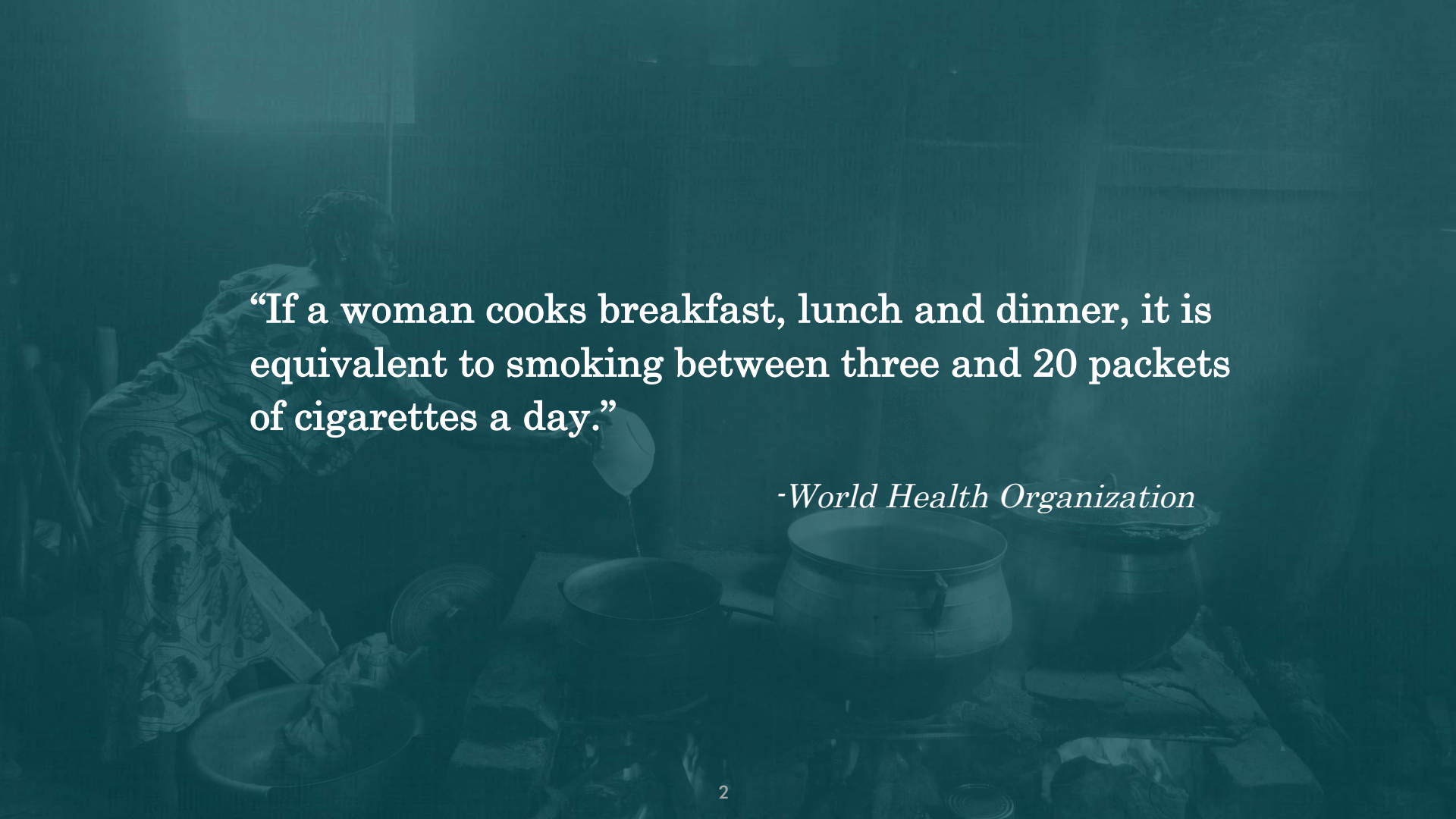


THE TRUTH ABOUT COOKING

Strategy Springboard

March 28, 2017



A woman in a patterned dress is cooking over a traditional wood-burning stove. She is pouring liquid from a small pot into a larger pot on the stove. There are several other pots and a bowl on the stove. The background is a simple, dark interior.

“If a woman cooks breakfast, lunch and dinner, it is equivalent to smoking between three and 20 packets of cigarettes a day.”

-World Health Organization

WHAT ARE WE UP TO?

A person is shown from the side, wearing a patterned wrap, leaning over a large, open fire. They are cooking with several large pots and pans. The scene is dimly lit, with the primary light source being the fire itself, which creates a hazy, smoky atmosphere. The background is dark and indistinct.

THE BURNING ISSUE: DEATH BY DIRTY COOKING FUELS

Over 80% of Nigerian households cook with kerosene and/or firewood which can cause serious health problems, if not **premature** death, from the smoke.

Cooking smoke causes over 98,000 deaths—mostly women and children—in Nigeria, annually.

Cooking smoke is the 3rd killer after malaria and HIV/AIDS.

A person wearing a patterned wrap is cooking over a traditional biomass stove. Several pots are on the stove, and steam is rising from them. The scene is dimly lit, with a teal overlay.

THE TASK AT HAND

Motivate our audience to stop cooking with biomass fuels and kerosene and start cooking with liquefied petroleum gas (LPG)

WHO ARE WE TALKING TO?

A woman in a patterned dress is cooking over a traditional wood-burning stove. She is pouring liquid from a small pot into a larger one. There are several other pots on the stove, and steam is rising from them. The background is dark and out of focus.

SNAPSHOT

- Lower middle class (C2) and survivor/poor class (D) women, 26-40 years old in Lagos and Abuja
- Both urban and rural
- Primarily married/partnered with children

Source:

* Euromonitor Consumer Lifestyles Report

** MGH 5C Landscape Analysis

BECOMING ECONOMICALLY EMPOWERED

Women play traditional roles as home makers, but they are also commonly economic contributors.

73% of women in Lagos are employed, 66% in Abuja.*

Saving is often expressed in terms of making money go further than putting it aside for the future.

Source:

* Euromonitor Consumer Lifestyles Report

** MGH 5C Landscape Analysis

GOING PLACES: IN SEARCH OF A BIGGER, BETTER FUTURE

Rural-to-urban migration accounts for 97% of migrant flows in lagos state and 85.1% in abuja. For women the most commonly cited reasons for migrating were to **join a spouse or marry** (40%), to **further education** (11%) and to **seek employment** (11%). Generally, those who are migrating to the city are younger and more educated.

“To make it big now.” (F, Lagos, 18-29)

“This is what I do start from small business before I go big.” (F, Lagos, 18-29)

“I should have enlarge in a very big way.” (F, Lagos, 18-29)

“I have grow up with, to my business self are going up.” (F, Lagos, 18-29)

“...build a house, have a larger company.” (M, Lagos, 18-29)

“I get a big contract.” (M, Lagos, 30-49)

73% of low-income respondents living in rented and rooming-house types of accommodation expressed an intention to move to another residence.

56% of this group intend to move into self-contained flats.

PUTTING FAMILY FIRST

Getting married and having children are regarded as musts in Nigerian culture.

Children are very important to families because parents believe that their children will provide support for them in their old age.
(Euromonitor)

“(My children’s) well being is my comfort.” - Mother, Abuja, 30 - 45

FAITHFUL

91% of the population attends religious services and 95% pray regularly.

“By 10 years what I’m praying, like now I’m a tenant, I’m praying that we have our own, I will be a landlady, and I will not be a tenant again and this my business will grow up.” (F, Lagos, 18-29)

“Yeah by the grace of god, I see myself going higher in my business, in my career, in my life, my family expanding...” (m, Lagos, 30-45)

MATERIALISTS ON A BUDGET

Many are living hand-to-mouth, with their daily budget meeting immediate needs. However, depending on the ability to spread out their expenses, cooking fuel can be a daily, weekly or monthly expense (more likely to be daily or weekly in the case of firewood and charcoal users).

Notorious bargain hunters. Haggling at open markets for small and “big-ticket” items, including electronics, appliances, cars and furniture is common. The preference for open markets over stores was heard in the focus group discussions regularly.

“And you can even price it, but in shop you can’t price.” (F, Lagos, 18-29)

Looking to make their money stretch further.

“Even the money he gave me, I have to gain from it. Because I will do daily contribution from it.” (F, Lagos, 18-29)

“I save money everyday because I can’t be waiting for my husband.” (F, Abuja, 30-45)

“I would call us the ambitious class, we’re hardly middle class but we strive hard to live the life we want. We can’t afford most of the things we have, but we buy them anyway because we aspire for the lifestyle they bring.”

- Euromonitor

PURCHASING POWER DEPENDENT ON RELATIONSHIP DYNAMICS

Joint decision-making is impacted by relationship dynamics.

“Even if you are making such a decision, it will still come from him, it will be like you are belittle him, because he does not have that.” (F, lagos, 18-29)

In both lagos and abuja, 80% of women decide how their cash earns are spent, but have little say in how their husband’s money is spent.

While each family varies, generally speaking items such as food, “cooking utensils and items like pots”, “things for the children” (school uniforms, socks, clothes etc.) Are bought by women. Bigger ticket items like appliances, furniture and electronics are bought by men.

PURCHASING POWER DEPENDENT ON RELATIONSHIP DYNAMICS

Given the price of cookstoves/LPG (and wage disparities) men will likely help finance the purchase.

However women are resourceful in convincing their husbands that a bigger ticket item is needed.

“Like for example when I wants to get freezer, I know that am the one that need it most, so I have to go, you know we ladies if we wants to get something, we know how we are going to get it, I don’t have n80,000 to buy freezer, I have to go and talk to him, persuade him, so he agreed to have it.”
(F, lagos, 18-29)

CURRENT USERS OF LPG COOKSTOVES

CONSUMER PROFILE

- Name: Rosemary Ajayi
- Gender/Age: Female, 35 yrs
- Segment : C2 SEC
- Occupation : Event planner
- Household income: N200,000-N400,000 monthly (\$650-\$1300 USD)
- Education: B.Sc. Mathematics, University of Lagos
- Spouse: Estate Agent, Male, 43 yrs
- Number of children: 3
- Owned Devices: Owns a car, smartphones, tab, house-hold appliances (TV, media player, air-conditioner, gas cooker, etc.)



HER STORY

- Rosemary, like most women, is a multi-tasker. She's responsible for running her family's day to day activities, including ensuring the home is clean, preparing meals, getting the children to school on time, monitoring their academics, ensuring they are healthy, etc.
- She rarely has 'me time' but whenever the opportunity arises, she 'steals away' to chat with friends and family, online and offline. Other times, she takes herself on a treat to a fast food restaurant in the neighborhood.
- She enjoys listening to, and sharing true life stories, so blogs like Linda Ikeji appeal to her.
- She is very aspirational, hoping to become one of the leading event planners in Nigeria.



MEDIA CONSUMPTION

Most Consumed Content

Telenovellas
News/Gossip
Entertainment programmes –mostly musicals and fashion.

Digital

- Blogs: Linda Ikeji
- Social media platforms: Facebook, Twitter, Instagram
- Websites: Jumia, Konga, OLX, Alibaba, Ali express
- Apps: WhatsApp, BBM, mobile banking apps



PROSPECTIVE USERS OF LPG COOKSTOVES

Consumer Profile 1

- Name: Ngozi Obikwe
- Gender/Age: Female, 28 yrs
- Segment: D SEC
- Occupation: Foodstuff Trader
- Household income: N50,000 – N80,000 monthly (\$160-260 USD)
- Education: Secondary school certificate.
- Spouse: Trader, Male, 35 yrs
- Number of children: 2
- Owned Devices: mobile phone, basic household appliances (Iron, TV, CD/DVD player, Radio, etc.)



HER STORY

- Ngozi is industrious and hardworking. She wakes up as early as 5.00a.m. to prepare her family for school and work.
- She bathes her two young children, prepares a quick breakfast for them and her husband, then gets herself ready to drop the kids off at school, before going to her stall in one of the main markets close to their school.
- She trades in food condiments (salt, seasonings, vegetables, etc.). It is here that a neighbour's older child drops off her children from school.
- In the evening, she goes home with the kids to prepare dinner for the family, and then, after cleaning up, she finally relaxes and watch interesting Nigerian home movies on TV/DVDs with her husband.
- Despite current economic challenges, Ngozi is still optimistic about life and believes that she and her husband could own a shopping mall similar to 'Ebeano Stores' and 'Shoprite' some day.



MEDIA CONSUMPTION: NGOZI

Most Consumed Content

Nigerian home videos

Local TV/Radio programmes



PROSPECTIVE USERS OF LPG COOKSTOVES

Consumer Profile 2

- Name: Hauwa Rabi
- Gender/Age: Female, 38 yrs
- Segment: E SEC
- Occupation: Housewife
- Household income: N10,000-N20,000 monthly (\$32-65 USD)
- Education: Primary
- Spouse: Farmer/Trader, Male, 45 yrs
- Number of children: 5
- Owned devices: mobile phone, household electronics (Radio)



HER STORY

- Hauwa's number one priority is taking proper care of her family, which basically involves cooking, fetching water and firewood, going to the village market, taking care of their five children and helping her husband on the farm.
- She is also obliged to participate in local community activities and events, e.g. peer group village meetings
- Though Hauwa is a full time home keeper, she finds a little time to chat and share experiences with family, friends and neighbours.



MEDIA CONSUMPTION: HAUWA

Most Consumed Content

Radio

Community and female gatherings, peer group meetings.



SOURCES OF FOOD AND COOKING INFORMATION

SEC: C2

- Family recipes are passed from one generation to another, hence majority learn their cooking skills and recipes from mothers/female family members
- Some also learn from friends belonging to another cultural tribe
- A few sometimes go online to learn about certain recipes and how to cook them
- For those really serious about cooking, they read articles in magazines and cooking books
- Some women in this group also watch television programmes on cooking.

SEC: DE

- Recipes/cooking habits in this group also passed down from previous generations (mothers/female family members)
- They also source for cooking information from family, friends and neighbours.

PURCHASING DECISIONS

SEC: C2

- Several factors influence the purchasing decisions and they include:
 - Children in the home who most often determine the type of product, particularly beverages and cereals bought
 - Income also influences the quality of products bought
 - Manner/way products are used in the home determine the quantity purchased each time.
 - Number of individuals in the home is also a major influencer for purchase decisions

SEC: DE

- Income is a major determinant of the purchasing decision in their households as it influences the quality and quantity of products bought
- Availability of food stuff/products determine their purchase - when particular foods are not in season, alternatives are considered because at those times the price of those items are usually more expensive
- During the festive seasons, purchasing power is higher because they save towards this time and are willing to go the extra mile to ensure family members enjoy themselves

WHAT DOESN'T INFLUENCE SWITCHING TO LPG?

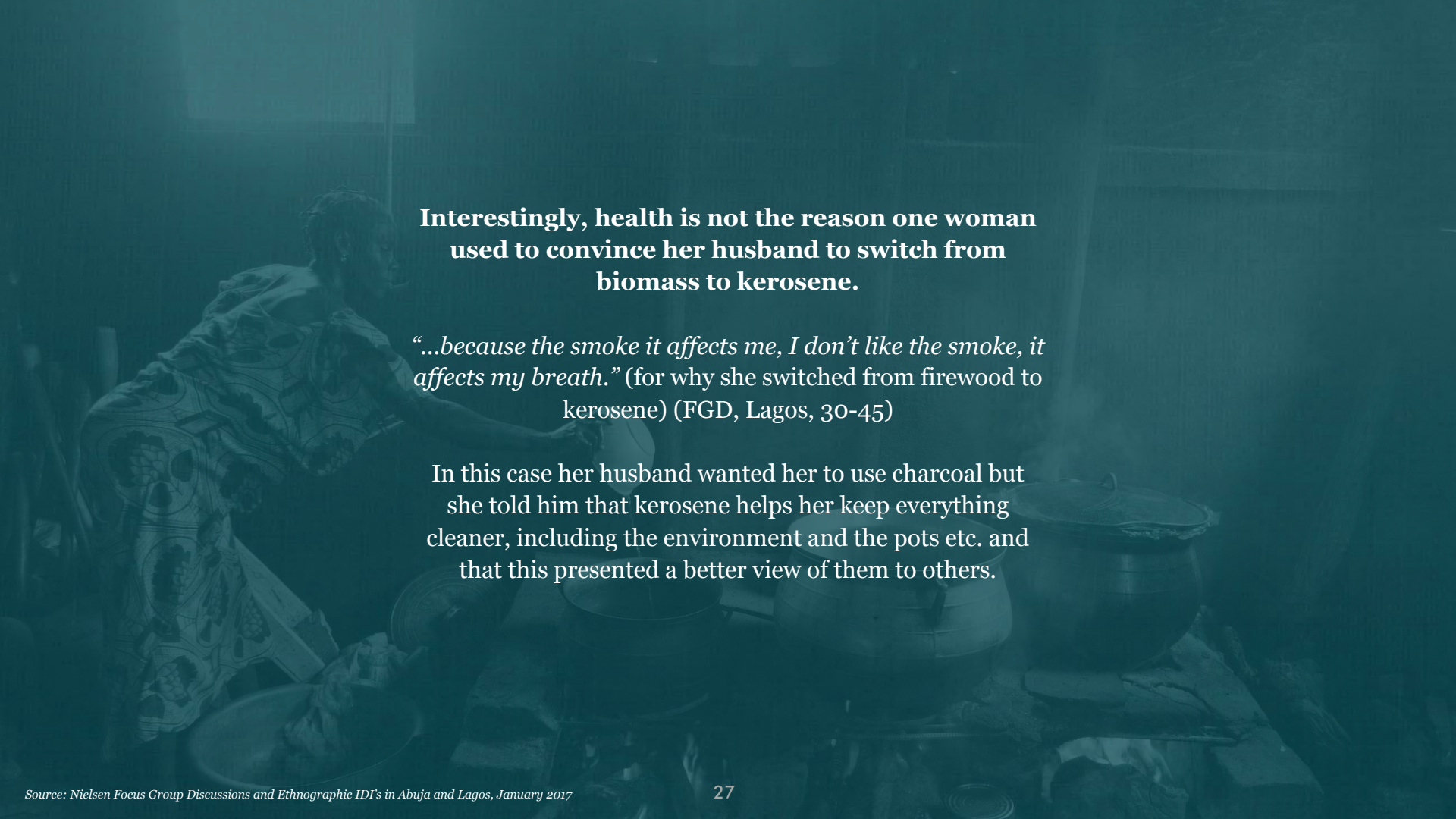
THE HARMFUL EFFECTS OF SMOKE

“I don't see any problem.” (FGD, Lagos, 18-29)

If she does see a connection at all (rare especially in the context of kerosene), she rationalizes it away:

“For example, it is not good for someone who is asthmatic or who has related ailments; but if you are normal, there is no problem.”

This makes sense given that our main competitor is kerosene which does not emit any noticeable smoke during cooking.

A woman in a patterned dress is cooking with large pots over a fire. The scene is dimly lit, with the fire providing the main source of light. The woman is leaning over the pots, and the smoke from the fire is visible. The background is dark and indistinct.

Interestingly, health is not the reason one woman used to convince her husband to switch from biomass to kerosene.

“...because the smoke it affects me, I don’t like the smoke, it affects my breath.” (for why she switched from firewood to kerosene) (FGD, Lagos, 30-45)

In this case her husband wanted her to use charcoal but she told him that kerosene helps her keep everything cleaner, including the environment and the pots etc. and that this presented a better view of them to others.

BUT THAT DOESN'T MEAN SHE DOESN'T WANT TO COOK WITH GAS

Of the Respondents surveyed in the Nielsen quantitative research, 53% of Respondents were “likely” and 17% “very likely” to buy a LPG stove.

More so in Lagos than Abuja*:

- 83% of Respondents in Lagos are “likely” or “very likely” to buy a LPG stove in the near future (likely the result of the higher number of kerosene users in Lagos)
- Only 54% of Respondents in Abuja answered the same

SHE WANTS GAS: “CLEAN BURNING” AND “FAST”

The most liked attribute about LPG is “Cooks fast” (82%) and the 2nd is “cleanliness” (46%).

- “Fast” is important to her because she can easily spend hours a day cooking for her family.
- Cleanliness is important to her because it’s how she keeps her family healthy. “Clean” was generally attributed to “clean pots” but also refers to a clean environment (kitchen).

SHE WANTS GAS: A SYMBOL OF PROGRESS THAT WILL ELEVATE HER STATUS

*“Like me, I went to visit my senior sister, this December, when I went to put on the gas cooker, I was scared and she said: “see this bush woman “, she came to insult me that I will first of all put what I want to cook in the fire before I put it on it, so **I am praying to have gas.**” (FGD, Lagos, 18-29)*

*“It makes you look unique.”
(FGD, Lagos, 18-29)*

BUT THERE ARE 2 MAJOR BARRIERS HOLDING HER BACK

“RICH MAN’S FUEL”

The initial cost of the stove, and the perceived high cost of fuel often deters low-income families. 55% of Respondents in the Nielsen quantitative research cited affordability as their number one barrier.

Note: Affordability does not only refer to the perceived cost of gas but also the unit size in which it's sold:

“Have to buy it in large quantities which makes it too expensive: We want to buy gas per litre.” (FGD, Abuja, 18 – 29)

“TOO DANGEROUS”

It's “dangerous/unsafe” was the 2nd most cited reason (28%), after high cost, for Respondents not using gas.

Words Respondents associated with gas:

“Fear”

“Explosion”

“Mistake”

“Be careful”

“Be extra careful”

STRATEGIC TERRITORY

A woman in a patterned dress is cooking over a fire. She is pouring liquid from a small pot into a larger one. There are several other pots on the fire, and steam is rising from them. The scene is dimly lit, with the fire providing the main source of light.

BRAND ROLE

Help her become the modern woman
other women look up to

A woman in a patterned dress is cooking in a traditional kitchen. She is pouring liquid from a small pot into a larger pot on a stove. There are several other pots and a large bowl on the stove. The background is a simple wall with a window.

HER CHALLENGE

Living in the city fuels a desire to live a more contemporary life. But our target audience feels stuck when she can't afford the things that can make this desire a reality.

AUDIENCE INSIGHT

The respect of her community is hugely important to her. Part of the experience of living in the city is making sure she's "blending in," upgrading where she needs to so that she's not being left behind, or worse, is scorned by anyone for her "rural ways."

"Like me, I went to visit my senior sister, this December, when I went to put on the gas cooker, I was scared and she said: "See this bush woman," she came to insult me that I will first of all put what I want to cook in the fire before I put it on it gas, so I am praying to have gas." (FGD)

For her, her capacity to earn respect is closely linked to the image she portrays – that means having a clean environment (home) and being dressed neatly ("How you are dressed is how you will be addressed"). Cleanliness and neatness play critical roles in her life because first, it's her way of keeping herself and her family healthy within her limited means and second, it's her way of proving to her peers that while she may be proud of her roots, she's not letting them hold her back.

A person wearing a patterned headscarf is cooking with LPG cookstoves. They are pouring liquid from a small pot into a larger one. Several other pots are on the stoves, and steam is rising from them. The scene is dimly lit, with a teal overlay.

TRUTH WELL TOLD

LPG cookstoves show where you're going
(not where you've been)

REASONS TO BELIEVE

LPG is within reach: LPG is now available in the quantity you want to buy, which means that you don't need to spend a huge amount every time you buy.

LPG is more economical than any other cooking fuel: Because LP gas uses a lot less energy to cook a meal than firewood, charcoal or kerosene does, costing you less money every day, week and month of the year that you use it. The more you choose LPG over firewood, charcoal or kerosene, the less money you spend over time. And the less you spend on cooking fuel the more you have to spend on the things that matter.

LPG is the cleanest way to cook: The dirty smoke from firewood, charcoal and kerosene silently kills 98,000 people every year. The LPG cookstove burns more cleanly than kerosene, firewood or charcoal. Your environment, your pots and pans, your children's clothes and the air that they breathe will all be cleaner if, and only if, you cook with LPG. Cleaner is healthier. For you and your children.

MANDATORY MESSAGES

KEY POINTS OUR CONCEPT WILL NEED TO SUPPORT

- LPG cookstoves are safe when used correctly
- LPG cookstoves are convenient and clean
- LPG cooking is more affordable than kerosene, especially over time