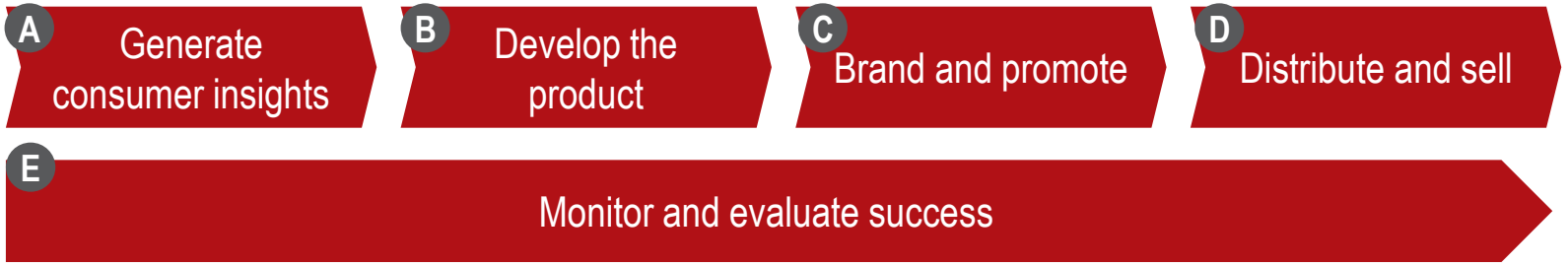
GSMA mWomen
Marketing Handbook

Manila Working Group
November 2013

Five key elements to designing and implementing a successful marketing strategy to target resource-poor women



- **A** Generate consumer insights in order to tailor product, communications and distribution strategies for resource-poor women
- **B** Meet women's wants and needs through user-centric product and service design
- **C** Reach women by tailoring branding, messaging and communications channels based on women's behaviors
- **D** Enable women's access to the right products, in a cost-effective way
- **E** Establish concrete objectives and key performance indicators to enable course correction during implementation

Generate consumer insights in order to tailor product, communications and distribution strategies for resource-poor women

A Generate consumer insights | B Develop the product | C Brand and promote | D Distribute and sell

1. Formulate analysis and research objectives
2. Leverage existing data
3. Narrow research objectives
4. Launch additional research as needed
5. Segment the market and set priorities

Key insights

- Research objectives should cover all stages of the marketing strategy, including
  - segmentation,
  - product design
  - branding and media consumption,
  - buying and consumption behaviors ,and
  - preferred distribution channels
- While researching target segments, seek insights on their wants and needs in terms of content and services, pricing and marketing touch points
- Start by leveraging your existing data, as it often helps address many of the research objectives and will limit the need for additional, custom research

Ask 'what do we need to know about women?'

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Formulate objectives and translate them into research questions

- Key insights to generate:
  - **Women's current ownership and usage patterns relative to the market,** e.g. the share of women in the customer base, in gross additions, churners, etc.
  - **Women's wants and needs,** e.g. data and insights on what women value in their lives and from mobile tools and services, e.g. purchasing criteria, satisfaction levels, etc.
  - **Opportunities to overcome barriers to uptake,** e.g. economic or other decision drivers, media habits, intentions to buy/use, etc.

- Translate into concrete questions for analysis
  - e.g. 'Do women have the same calling pattern during the day? And if not, how relevant is our off-peak pricing to them?'

Challenge the perception that data on women doesn't exist

- MNOs frequently express the belief that reliable data on women doesn't exist or requires large investment in ad hoc research

'We know we have to look actively at the women segment…the problem is that it's a black hole for us…we know nothing about this segment and there is no spare budget for further research'
-Marketing executive of an MNO

Many research objectives can be fulfilled by analyzing existing data and market research

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Perform new analysis on existing data

- Before investing in new research, **explore existing data and research**
  - e.g. brand trackers, consumer satisfaction surveys, segmentation studies
- Be aware of biases in market research methodologies:
  - e.g. phone-based surveys: women often are less likely than men to take calls from phone interviewers, particularly if men

Beware of CRI data

- Often Customer Registration Information (CRI) is the only easily accessible gender data
- In the case of women, SIMs often are registered under the name of husbands, brothers or other male relatives, particularly in conservative settings where cultural norms may discourage women's use of mobile
- **Avoid using CRI data unless it is reliable**

Include gender splits in all future data collection

- Disaggregation by gender is quite common in research
  - e.g. from phone- or field-based research, disaggregate women interviewees' MSISDNs so usage data over 6-12 months can be analyzed and compared to men

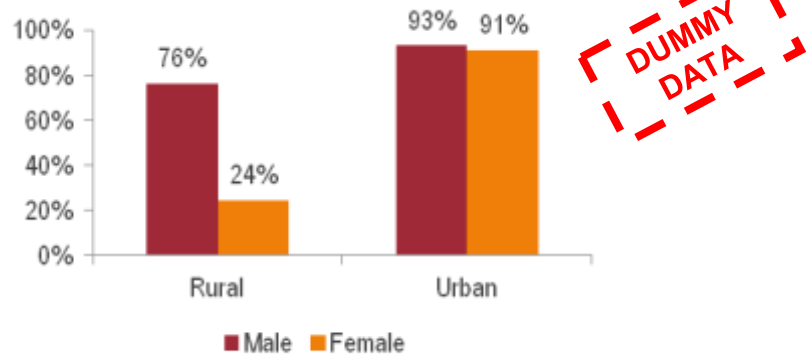
1. Mobile Subscriber Integrated Services Digital Network-Number

Existing data can yield useful insights quickly and inexpensively

Examples of analyses that may be possible using existing research and internal data

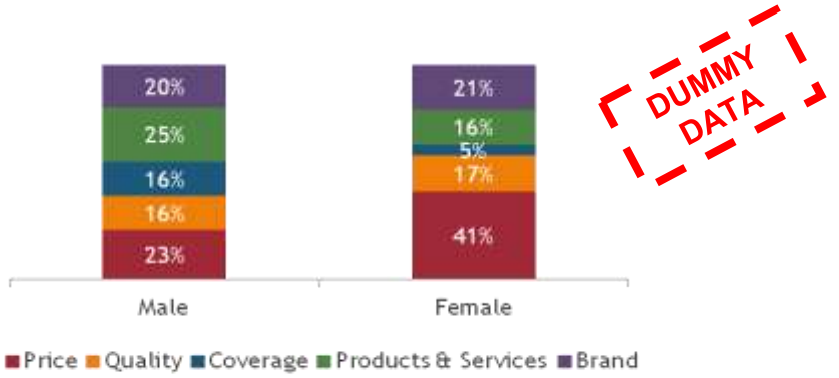
1 **Operator "X" top-of-mind awareness**

(%)



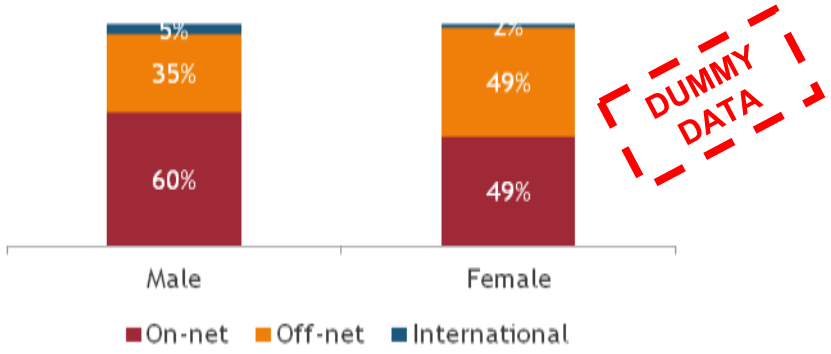
2 **Key purchasing criteria**

(% who identify as main reason for decision)



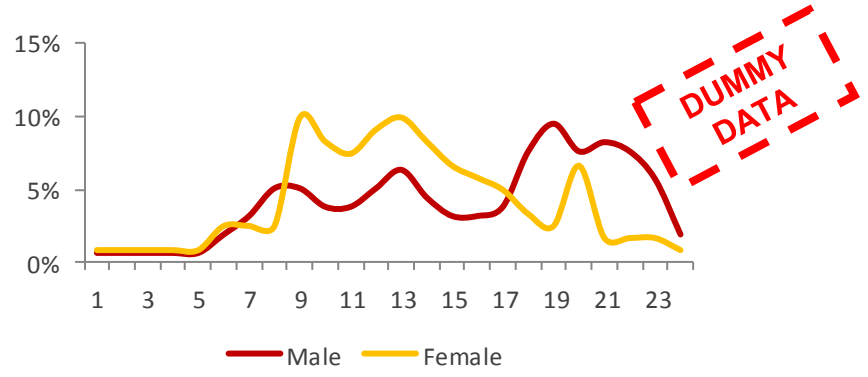
3 **Breakdown of voice traffic**

(% of daily minutes of use outgoing)



4 **Breakdown of voice traffic by hour of the day**

(% of daily minutes of use outgoing)



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Design new research to fill gaps remaining after analysis of existing data

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Seek to understand 'why?' through qualitative research

- Obtain **behavioral insights**, e.g.
  - Why is women's off net/on net ratio so different to men's?
  - Why do they purchase different products?
  - Why don't existing above-the-line campaigns reach them?
- Carry out qualitative research, including focus group discussions (FGDs) and one-on-one, in-depth interviews
  - Perform qualitative research on a representative sample of women from various segments or demographic groups
  - **Include men**, both to understand how they may influence women's purchase decisions, but also to offer market wide comparisons

Analyze existing and new data to build a map of the women's market

- Goal is to **understand both how women are similar and different to men, as well as how women may differ from one another**
- The analysis should include drivers and barriers of both mobile ownership and usage
  - In some cases, women may own a phone for reasons such as security or communication with distant family, but may not understand or appreciate the full range of services available on a phone, thereby limiting usage

Use research findings to segment the women's market

1 2 **Segment the market**

- Group individuals with shared characteristics, needs, behaviours and aspirations to inform product design and distribution strategies along dimensions:
  - Usage, e.g. high SMS senders vs. international callers vs. off-net addicts, etc.
  - Socio-demographics, e.g. youth, urban, middle-income, etc.
  - Attitudes, e.g. 'adventure seekers', 'moderns', 'tech crazy', etc.

3 4 **Build a profile of each segment**

- Profiles of each women's segment should include at least the following:
  - Current status along key metrics, e.g. mobile penetration, market share, average ARPU (operator vs. competitor), performance on brand and satisfaction key performance indicators (KPIs), etc.
  - Performance potential in terms of increased ownership (by sales to non-users, or by churning competitor's customers), and increased usage via new products

5 **Set priorities**

- MNOs can use these profiles to prioritize segments

Meet women's wants and needs through user-centric product and service design

A Generate consumer insights | **B Develop the product** | C Brand and promote | D Distribute and sell

1. Identify product requirements; perform a gap analysis on existing portfolio
2. Adapt or create new products
3. Identify suppliers/partners needed
4. Test, launch and scale-up new products

Key insights

- Consider the **full range of features** when designing products or services, e.g tariff plans, VAS aligned to women's needs, handset packages, etc.
- Barriers to women's mobile service uptake (cost of ownership, use and power, cultural barriers, technical illiteracy and perceptions of value) should inform the product features:
  - In some instances, women's first phone is a second-hand purchase or a gift from a family member who upgrades to a new phone.
- Existing products and services may be well-suited to serve women's needs with minor adjustments:
  - e.g. fresh marketing or distribution approaches, greater educational components, or voice-based features.

Reach women by tailoring branding, messaging and communications channels based on women's behavior

A Generate consumer insights | B Develop the product | C Brand and promote | D Distribute and sell

1. Identify and analyze key audiences
2. Define key messages
3. Select communication channels/activities

Key insights

- Consumer insights and general market research can help identify **priority women audiences and key influencers**, media usage patterns and effective messages for branding and promotion
- Products designed for women should be clearly positioned within the overall MNO brand strategy, leveraging key messages from the brand while differentiating the features most valued by women
- An integrated communications strategy should leverage the channels women already rely on and trust
- While ATL can be useful, many resource-poor settings may require BTL approaches tailored to the needs of resource-poor women
  - e.g. posters, wall drawings, street plays, games, and group events which offer the opportunity to exchange views with vendors or other women customers and test products before purchasing.

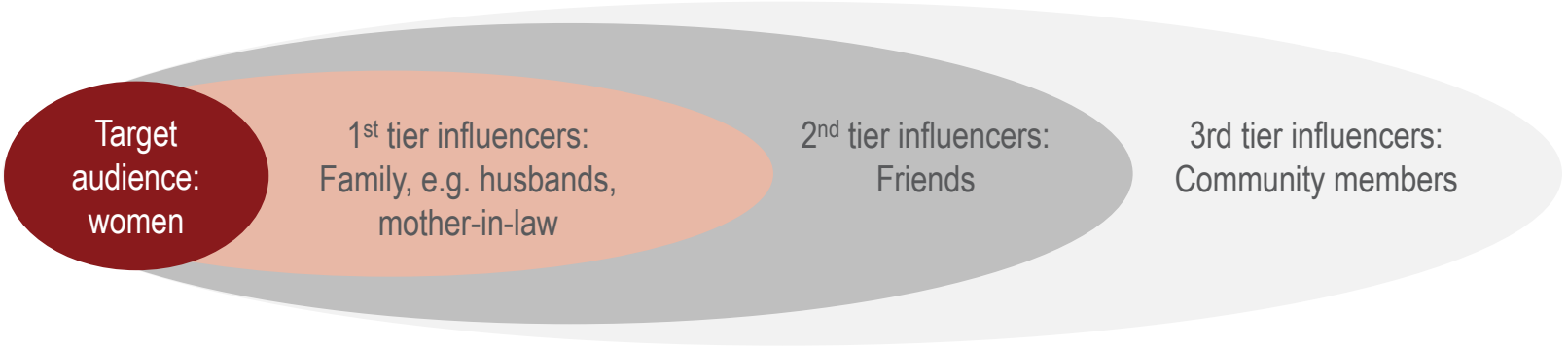
Communications campaigns can target both the end user as well as her key influencers

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Identify key audiences

- Define and prioritize target audiences based on segmentation strategy and consumer insights research
- Research can illuminate the sources women consult for information relevant to decisions about SIM card purchase and mobile phone usage
- Consider whether and how to incorporate these influencers into the branding and promotional campaigns
  - e.g. in many highly traditional or conservative contexts, the male head of household is likely to influence major purchase decisions
  - In other cases, women may learn from their more tech-savvy children

Sample prioritization of key audiences



Enable women's access to the right products, balancing needs and the cost of distribution

A Generate consumer insights | B Develop the product | C Brand and promote | D Distribute and sell

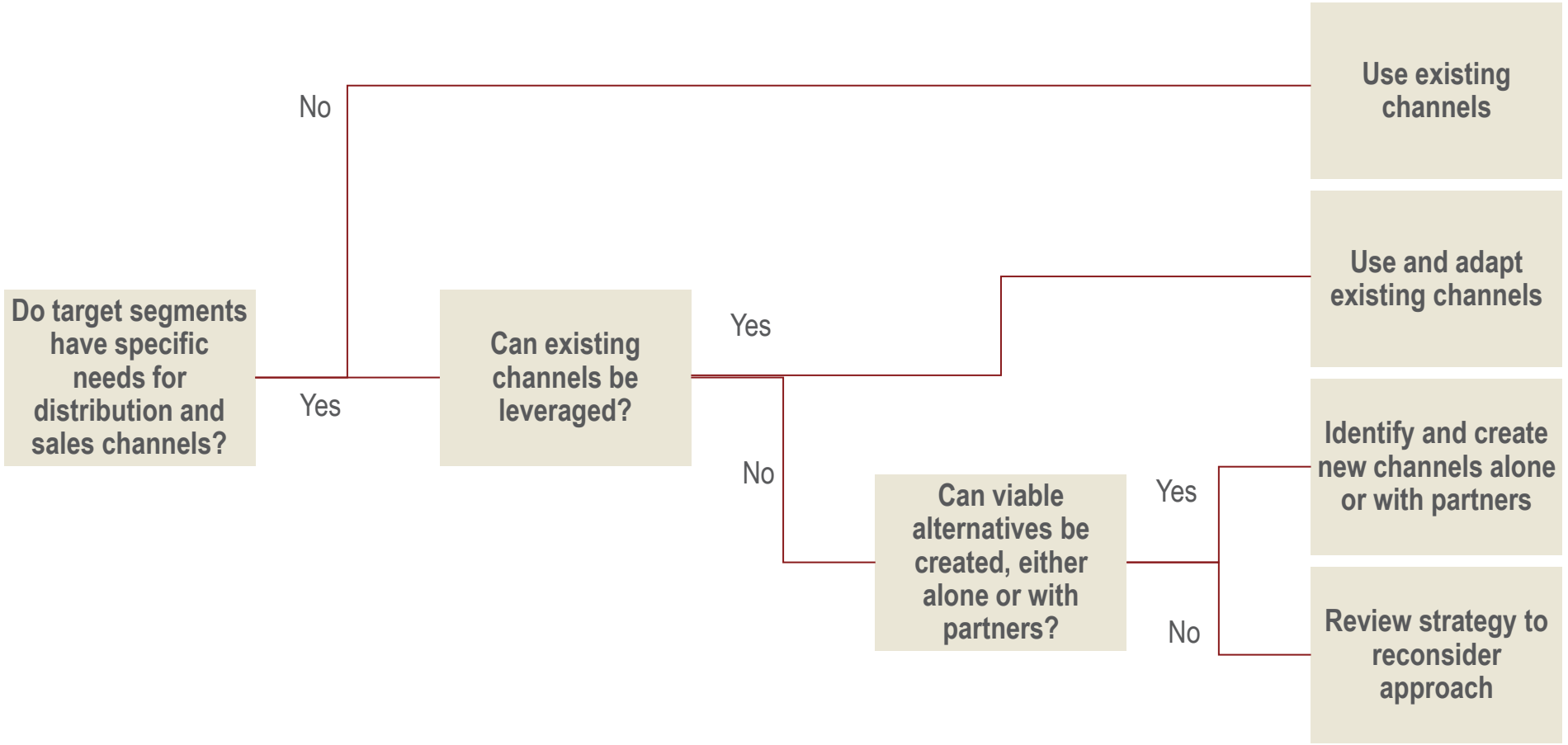
1. Understand customer service requirements
2. Map and assess existing distribution and sales channels
3. Select the right distribution channels and partners
4. Develop distribution channels

Key insights

- Understand if women have different needs when it comes to distribution:
  - e.g. they may use different retail outlets or different needs such as more women retailers or more education at point-of-sale
- Where possible, existing distribution and sales channels should be strengthened to serve women through training or other investments
- Partnerships generally are critical to developing distribution channels; in the case of women, non-traditional development partners may help MNOs to expand coverage and reduce cost of establishing new channels
- Regardless of the channel, training and monitoring of service quality are critical

Distribution and sales channels are expensive to build and maintain, so a first step is to consider using existing channels

Sample decision tree for considering distribution and sales channel options



Research best distribution touch points and customer care needs of women

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Research women's shopping habits and specific service requirements

- Design consumer insights research to capture insights on where and when women shop, as well as the conditions that make them more comfortable buying mobile phones
- For example, research in some low-income settings reveal that:
  - Women in low-income settings often lack formal education and experience using technology and often buy cheaper, second-hand handsets without manufacturers' support or manuals.
  - They therefore require more education at the time of purchase and will more readily adopt mobile services if friendly, accessible information delivered by a trained agent is available at the point of sale

Women-friendly, experiential sales at the doorstep: MTS Saheli Bus Tour (India)[1]

- MTS delivers a sales experience to women right at their doorsteps
- An entirely female staff travels by air conditioned bus to offer women hands-on demonstrations of products and services
- The bus environment allows women to experience an array of services, including the opportunity to touch and feel the latest technology and get insights into the digital world

'The women inside Saheli bus are very helpful and showed me a lot of things which I didn't know. I was only using the phone for talking. Now I can do much more'
MTS customer



Credit: MTS

1. Altai Consulting interviews with MTS India (December 2012)

An analysis of existing distribution and sales channels will help identify opportunities and gaps

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Analyze both the nature and quality of existing channels based on women's needs

- Analyze strengths and weaknesses of existing channels relative to women's existing shopping habits and service requirements, e.g.
  - Retail outlets that cater to men, with male salespeople
  - Retail outlets that are far and difficult for busy women to reach

Family networks acting as informal distribution channels (Kenya)

- In Kenya, urban workers who have migrated from rural parts of the country sometimes purchase phones for their parents and other relatives back home
- Motives may include:
  - Staying in touch between infrequent visits home
  - The ability to transfer money home more easily
  - Being accessible in case of emergencies



Credit: IT News Africa

A mix of traditional and innovative channels can help increase coverage to previously hard-to-reach women customers

1 **Tailor existing channels to meet women's needs**

- Consider improvements to existing channels where possible for more cost-effective distribution:
  - e.g. improve retailer training and ability to provide customer education
  - e.g. improve branding

2 3 **Consider non-traditional channels**

- Informal channels such as NGOs or women's groups may help reach resource-poor women in rural areas:
  - e.g. Unilever India set up a distribution system for remote areas by working with local women's self-help groups
- Retail outlets for women are another option:
  - Where cultural norms limit public contact between men and women, such channels are critical
  - In other cases, women feel more comfortable learning and asking questions about product features of other women

4 **Build an optimized portfolio of distribution channels**

- Use existing channels and create new channels if necessary that align to women's existing habits, preferences, and needs to provide better distribution coverage:
  - e.g. traditional retail outlets may be more efficient to reach urban customers, whereas alternative networks may need to be built or extended to reach out to women living in remote rural areas

Non-traditional channels and partners can help reach women

Examples

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Living Good's distribution model in Uganda [1]

- Living Goods reaches over 100,000 households in slums and rural areas through a distribution network of 800 Community Health Promoters (CHP), women serving their own communities
- CHPs offer a basket of over 90 diverse products, including health products such as water filters and consumer goods such as Always sanitary pads, Pampers diapers, etc.
- These women retailers have been trained to offer basic health services and advice, as well as to educate their female customers on products and services
- CHPs reach women via multiple distribution points in order to increase cost-effective coverage: door-to-door, SMS orders, home-based kiosks, and pop-up stores during women's group meetings and on market days



Credit: Living Goods

Vodafone Angel Stores in India [2]

- Angel stores are managed and run by women employees who play all roles, including security, customer service and management
- The stores offer a welcoming environment to women customers who are often less familiar than men with mobile technology, and who feel more comfortable asking questions to women in a more women-oriented environment

"Personally, I feel more comfortable with women customers telling them about the features of products and services.""
Vodafone sales agent



Credit: www.mobigyaan.com

1. Altai Consulting interviews with Living Goods (December 2012); 2. Indiamart (last accessed in January 2013)

Training and monitoring performance throughout the distribution chain is critical to ensuring service quality for women, as well as men

1 2 **Invest in training sales agents**

- Quality of distribution services and reliability of sales agents will be particularly valued by women, particularly in settings where women are new to the technology and rely on vendors to introduce the products
- Bolstering training for traditional vendors may improve service quality for all customers
- Training is particularly important for non-traditional channels, both on how to serve women, but also on the product features

3 4 **Monitor performance**

- Monitor service quality, as well as women's utilization of the channel, e.g.:
  - The number of women visiting
  - The frequency and types of services requested

Establish concrete objectives and key performance indicators to enable course correction during implementation

A Generate consumer insights | B Develop the product | C Brand and promote | D Distribute and sell

E Monitor and evaluate performance

1. **Define success with clear performance objectives**
2. **Monitor and evaluate performance**

Key insights

- Appropriate key performance indicators (KPIs) enable measurement of success towards the objective of developing the women's segment, e.g. penetration, usage, perception
- **Financial and other commercial indicators** for an MNO's women's strategy should align to those used to monitor performance for the business as a whole
- Performance analysis performed regularly enables course correction and greater, shared understanding of the women's market over time
  - e.g. including everyone from the CEO to strategy to sales, including both internal and external stakeholders

Articulating and quantifying the definition of success is an important step even prior to launch

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Define success and set clear targets for each segment

- A clear definition of success will help to focus the team's efforts and create a clear roadmap and incentives for success
- Cases where MNOs have launched mWomen products and services without clear objectives have tended not to lead to meaningful results

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Consider both commercial and social value

- To be commercially sustainable, mWomen products and services often must demonstrate commercial value
- Social value can include value to women not only in terms of gaining first-time access to a mobile phone, but also in terms of better serving their needs
  - KPIs such as increased number of women subscribers and increased minutes of use reflect both commercial and social value
  - Other KPIs measuring social value may be more complicated, requiring use of surveys and focus groups

Crease a baseline to measure progress

- To measure success, a snapshot of the 'as-is' is necessary
- Select a point in time to perform a baseline analysis of all KPIs

Monitor KPIs throughout deployment to improve likelihood of success

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Leverage existing data collection and analysis opportunities

- Explore the opportunity of a **gender field** to capture mWomen-related KPIs
- Existing data collection efforts may already offer opportunities to collect data on KPIs relevant for women's products, e.g. brand trackers
  - Ensure gender is a field in all surveys or other data collection tools
- To the extent possible, capture gender data at all consumer touch points, including store traffic, activations, calls to customer care, etc.

Consider low-cost tools to capture new data

- Leverage distribution partners such as NGOs to capture data at purchase or service delivery points

Review performance to identify opportunities to improve

- Ongoing measurement of results enables continual course correction
- Data capture and analysis during pilots and initial product launches allows MNOs to create models for scale-up and replication across markets

The full Marketing Handbook is available at http://www.gsma.com/mobilefordevelopment/gsma-mwomen-marketing-handbook