



GUIDANCE NOTE 2

Consumer Behavior: How do we understand sanitation consumers in target markets?

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In this Guidance Note you will learn:

- How to think about households as consumers of sanitation products and services
- Common consumer motivations, desired product attributes, and barriers for investing in improved latrine designs
- How consumer market research is used to develop Sanitation Marketing strategies
- Practical tips and steps for UNICEF in planning and managing consumer market research

1. Households as Sanitation Consumers

In Sanitation Marketing (SanMark), we learn to think about households as consumers, not beneficiaries, of sanitation goods and services. When low-income rural households build an improved latrine – whether it is their first latrine or an upgrade from an unhygienic or temporary facility – they make a decision to invest money and effort in something they have never owned. This typically involves a new technology or product, and construction methods they may not have seen, touched, or used before. To motivate household to spend hard earned money and effort for an improved latrine, the very first step is to **understand them better**. SanMark programs start by gaining a deep understanding of consumer needs, motivations, preferences, and barriers for acquiring improved sanitation. In this Guidance Note, we share key concepts and insights about household latrine consumers and some practical tips for planning and managing consumer market research to inform your SanMark strategies.

2. Three Conditions for Household Investment

SanMark programs create new demand for improved sanitation by convincing as many households as possible to invest in an improved latrine. Successful programs effectively communicate the **'right' messages** and ensure that the **'right' products and services** are easily accessible to target low-income consumers. With the 'right' products, marketing strategies, and messages, SanMark programs can succeed in achieving three essential conditions for household investment:

- 1) Consumers who are convinced that having an improved latrine will help them achieve personal goals and improve their daily lives in practical ways that are important to them (not to us), AND
- 2) Improved latrine designs with the features, functions, and quality that target consumers want (the 'right' product) easily available at prices consumers feel is reasonable, AND
- 3) A simplified process for purchasing the materials, components and services required to install the improved latrine so that it is more convenient and predictable for consumers.

To achieve these three conditions, we must get to know our target markets: what they think and worry about; what they value, believe, and want for their family; what sanitation features they care about; and what motivates or prevents them from investing in an improved latrine.

3. Why do households invest in improved latrines?

Findings from developing countries around the world show that households are almost universally motivated to invest in improved latrines and upgrade to satisfy one or more of the private aspirational and well-being goals in Table 1. These private ‘motivational drivers’ for improving sanitation are fundamentally different from CATS and CLTS messages. These drivers are critical for moving households beyond an awareness of the need to stop open defecation, to feeling convinced of the personal benefits they can gain from having a more durable, improved facility. Conducting consumer market research will help you identify which of these motivational drivers are most important to consumers in your target market.



Table 1: What are the common motivational drivers for consumer investment in improved sanitation?*

- Increased comfort
- Increased privacy
- Increased convenience
- Increased safety, for women, especially at night, and for children
- Pride and social status
- Increased cleanliness, in terms of personal hygiene, and domestic cleanliness
- Reduce smell and flies
- Less embarrassment with visitors
- Reduced conflict with neighbours
- Good health in a very broad cultural sense, often linked to disgust and avoidance of faeces, bad “air” smells
- Reduced illness and accidents
- Peace of mind
- Increased property value
- Increased rental income
- Eased restricted mobility from illness, old age
- Passing on good habits and a better future to children (aspirational legacy)

* Findings of sanitation consumer market research from 12 developing countries in Africa, Asia and Latin America, expanding from the synthesis by Jenkins and Sugden (2006).

4. Which features of an improved latrine matter the most?

Global market research has also uncovered common latrine attributes that are important to household consumers. As shown in Table 2, these often involve features and qualities that relate to the non-health advantages of having a good latrine, such as greater privacy, improved aesthetics, cleanliness, more value, modernity or safety. From the perspective of household consumers, desired product features often have little to do with our public health goals.

Finding out what features and attributes consumers want from a good latrine will help you design the 'right' products, and position them in the market by effectively advertising what they offer to consumers.



Table 2: What are common preferred latrine qualities and desired attributes?*

- No smell (of urine or faeces)
- No sight of faeces
- Durable, long lasting
- Easy to clean surfaces
- Solid and safe platform
- Safe for children
- Provides good privacy for women, girls for menstrual hygiene management
- Aspirational (pleasant, beautiful)
- Makes me proud
- Easy to operate and use
- Comfortable (pleasant to use)
- Doesn't fill up fast
- Does not require constant maintenance and repair
- Water-based (cultures using water for anal cleansing)
- Dry system (places where water is scarce / expensive)

* Findings of sanitation consumer market research from 12 developing countries in Africa, Asia and Latin America, expanded from the synthesis by Jenkins and Sugden (2006).

5. What prevents households investing in improved latrines?

Market research and SanMark experience have also helped us identify common barriers and constraints to consumer investment in improved sanitation (Table 3). The most widespread barriers involve: 1) affordability of existing latrine designs on the market, and 2) difficulty and complexity for households to collect and arrange purchase and transport of the materials, components and services to build these existing designs.



Table 3: Common barriers to consumer investment in improved sanitation*

- Difficulty accumulating cash for lump sum payment
- Not enough income (poverty)
- Technical complexity of construction or complexity of purchase and arranging materials, services
- Perceived high cost of latrine designs due to unreliable or no price information
- Locally available options offer poor consumer 'value'
- Lack of awareness of available products, services or providers
- Satisfaction with existing defecation practice/ place
- Low priority
- Competing priorities for savings, time, effort
- Distrust of suppliers / providers

*Findings of sanitation consumer market research from 12 developing countries in Africa, Asia and Latin America, expanded from the synthesis by Jenkins and Sugden (2006).

In SanMark, we address these two challenges first and foremost through product design (or re-design) aimed at improving consumer 'value'. This means ensuring that sanitation products are affordable and product features are desirable to the majority of low-income consumers. Focusing on value does not mean designing the very lowest cost product possible – quite often the cheapest possible solutions offer very poor value, are not desirable to consumers, and are not something they are willing to invest in (see GN5: Getting the product right). SanMark also improves consumer value by reducing the difficulties, complexity, and effort of buying and installing new products through an appropriate supply chain and business model strategy (see GN3: Sanitation Supply Chain and Business Models).

6. What do we need from sanitation consumer market research

Consumer insights from our market research help us to design our SanMark strategies by answering three essential questions:

- 1) What is a 'good' latrine (compared to a 'bad' one), what features and functions should it have (and not have), and what should it cost?
- 2) What do consumers and their families gain personally from having and using a 'good' latrine, compared to what they have and do now for defecation?
- 3) How can we make the process of learning about, purchasing, and installing a good latrine a lot easier, quicker, and more reliable for low-income households?

Answers to these questions cannot be found by consulting with public health officials or WASH program staff – they can only be answered by our target consumers themselves. In conducting the research, we put an emphasis on qualitative research methods, for example in-depth household interviews, focus groups discussions, and informal assessments (particularly if budget is limited). The emphasis is on listening, learning and provoking conversations with consumers that can lead to new insights. This type of research is different from KAP or baseline surveys. The goal is not to generate quantitative data, but on understanding sanitation consumer behavior.

Consumer market research guides three important SanMark program design steps:

- 1) Product design: Identifying and designing one or more affordable, desirable improved latrine designs with the features that target consumers want, and which can be easily purchased and installed by them (GN5: Getting the Product 'Right')
- 2) Business model design: Helping local businesses to profitably produce and sell the new latrine products and services to target consumers in a way that simplifies the purchase process so it is easier, quicker, more rewarding and reliable for consumers (GN3: Sanitation Supply Chains and Business Models)
- 3) Demand creation and marketing strategy design: Creating strategies, messages, and channels to effectively communicate the private benefits of improved latrine designs and to advertise the new products and services to consumers (GN7: Demand Promotion and Marketing)

An understanding of households as consumers is the basis for all of our SanMark work, so taking the time to invest in good consumer research at the start of your program is essential. If you have an on-going SanMark program, we recommend reviewing the product design options, business models, and promotional strategies used in the program to see if they are meeting the three essential conditions for household investment indicated above. You can do this by adapting consumer market research methods (see Box 1) to assess whether program strategies are meeting consumers' needs and desires or require design adjustments.

Key Resources for doing Consumer Market Research

- USAID HIP (2010) Sanitation Marketing for Managers: Guidance and Tools for Program Development has detailed instructions for planning and conducting a consumer market research study for smaller scale projects and limited budgets. This includes question guides, analysis templates, probing techniques, and sampling criteria and selection methods for field research. <http://www.hip.watsan.net/page/5007>
- WSP's Introductory Guide to Sanitation Marketing and On-line Toolkit has guidance on developing, procuring, and managing large-scale commissioned market research studies. This includes example Terms of Reference for market research firms, and example market research reports from a number of countries. <http://www.wsp.org/toolkit/what-is-sanitation-marketing>

IDEO's Human Centered Design Toolkit has methods and tips for conducting consumer market research, developing insights and generating design ideas (see further discussion in GN5). <http://bit.ly/TPQvTk>

7. Planning, budgeting and managing the market research process

Below are five key steps UNICEF can undertake to manage the market research process so that you get the results you want.

Step 1: Creating the Terms of Reference

Your first step will be to define the research purpose, the questions you want to answer, and the objectives and outputs you would like to see. Consult the resources in Box 1. Take time to reflect on how you will use the results and information you collect to inform product design, business model design, and demand creation and marketing strategies (see above). Developing a good TOR may take some time, but it is worth being clear about what you want out of the research right from the start.

As you prepare your TOR, think through how you want the data to be analyzed and presented. Two useful conceptual frameworks for analyzing sanitation consumer behavior include SaniFOAM (WSP 2011) and the Sanitation Preference, Intention, Choice Decision Stages Model (Jenkins and Scott 2007). These frameworks can be included as annexes to the TOR, so that potential consultants can consider them as they develop their proposals. You can consult example TORs in the WSP Sanitation Marketing Online toolkit (under Formative Research) and those used by other UNICEF country offices to get ideas about what you want to include. Also look at existing sanitation consumer research study reports for ideas about how you want your final outputs to look (see Resources below).

Step 2: Scoping the effort

Establish a budget envelope and scan the market to get a sense of rates for market research firms and consultants. Research costs will vary depending on the geographic area to be covered, the data collection and analysis methods, sample sizes, and ease/difficulty of reaching target areas. Allow adequate time for consumer research. Depending on the scale and scope of the effort, market research can take 3 to 6 months.

Step 3: Finding the right people

Consider hiring a professional market research firm, or one or more qualified consultants. Make sure the proposed team has demonstrated experience in qualitative research methods and data analysis, including probing and asking

open-ended questions. Strong qualitative research skills are more important than knowledge or expertise in sanitation, public health, or engineering.

The team should include local people who can communicate fluently in the required local languages. Check the resumes of the proposed team, but more importantly check their past work. Ask for examples of other research outputs or reports, and references from other clients.

To build capacity and the knowledge base of members of your own team or your partners, consider including one or more of them in the research process. In Malawi, UNICEF hired an individual consultant who trained district government partners in qualitative research methods and analysis, using tools in the USAID HIP Sanitation Marketing for Managers manual (see Box 1).

Step 4: Providing support and input

Once the consultant or firm is ready to start, you should meet to clarify and discuss the proposed research plan, timeline and deliverables. In developing the research protocols, encourage the research team to consult and build on existing questions guides, sampling guidance, and other tools (see Box 1). For large contracted studies, the firm should prepare an inception report for UNICEF review, covering the detailed field methods, draft instruments, pre-testing plan, sampling methods, analysis plan, and timetable. For smaller qualitative studies, UNICEF should review the interview and discussion guides and data analysis approach before field work begins. As the research gets underway, stay informed of progress and challenges and ask for regular updates from the field team.

Tips

Tips for Sampling

- In general, the research plan should include a 'stratified' sample of latrine owners and non-owners and males and females from a range of households, including different livelihood sources and income levels, demographic profile, and ethnic and cultural backgrounds. Interview should be conducted with owners of different types of latrine designs, including improved and unimproved designs, and with those who have no facilities at all. There should be a mix of male- and female-headed households, and men and women, to understand differences in their views.
- Conduct interviews in a range of communities, including those with different hydro-geologic, geographic, and cultural contexts. Consider including both CATS triggered and non-triggered communities to understand and compare insights from these communities that may be relevant for your SanMark strategy design.

Step 5: Analyzing and sharing the results

The final research study report should include top-line results, a description of methods, and presentation of the full findings and results. The initial draft may go through several revisions based on your team's feedback and review so prepare the consultants for this possibility. Depending on the type of research you are conducting, you may want to ask for translated transcripts or summaries of individual interviews and focus group discussions, or clean copies of primary data sets where appropriate. The final research results and analysis are a key input into the next steps of your SanMark program design, so make sure you receive these on time. It is always possible to go back later to conduct further analysis. When the results are ready, have the consultants present and share them in a workshop

with key sector stakeholders so that you can discuss and analyze findings together and brainstorm directions for designing products, business models and marketing strategies in the next steps of your SanMark program design.

8. Going Forward

Successful SanMark programs are built on a foundation of good consumer market research to ensure programs are using the 'right' messages to motivate consumers, and offering the 'right' sanitation products and services through local businesses. Plan and budget for SanMark market research as the first step in your program development cycle, and engage government partners and sector stakeholders early on in the process so they are ready to use research results in the next steps of SanMark program design.

Resources

Further reading:

1. WSP (2010) Introducing SaniFOAM: A framework to analyze sanitation behaviors to design effective sanitation programs. http://www.wsp.org/sites/wsp.org/files/publications/GSP_sanifoam.pdf
2. Jenkins and Scott (2007) Behavioral Indicators of Household Demand for Sanitation and Potential Gains from Social Marketing. *Social Science and Medicine*, 64(12):2427-42.
3. SanMark Community of Practice Website (Resources Page) <http://www.sanitationmarketing.com/resources>

Examples of Sanitation Market Research Studies:

1. UNICEF Malawi (2011) Market Assessment of Rural Sanitation in Malawi: Demand, Supply and the Enabling Environment for Sanitation in Dowa, Mangochi and Nkahta Bay. Prepared by Ben Cole. November 2011.
2. UNICEF Sierra Leone (2011) Sanitation Marketing Study: Demand and Supply Chain Assessment for Sanitary Latrines in Urban and Rural Areas of Sierra Leone. Prepared by NestBuilders International, Sierra Leone.
3. WSP (2008) Sanitation Demand and Supply in Cambodia. Field Note. http://www.wsp.org/sites/wsp.org/files/publications/Sanitation_demand_and_supply_fieldnote_final_1.pdf
4. WSP (2004) Who buys latrines? Where and why? Field Note. http://esa.un.org/iys/docs/san_lib_docs/Who%20Buys%20Latrines.pdf

About the UNICEF Sanitation Marketing Learning Series

This Guidance Note is part of the UNICEF Sanitation Marketing Learning Series, a learning initiative designed by the University of California Davis (UCD) to improve Sanitation Marketing knowledge and practice within UNICEF. The Learning Series is delivered by Mimi Jenkins (UCD and London School of Hygiene and Tropical Medicine), Danielle Pedi (Consultant, WASH Catalyst), Jeff Chapin (Consultant, IDEO), and Mike Rios (17 Triggers Behavior Change Lab).

The ten Guidance Notes in the Series are available for download here: <http://uni.cf/Xo2o2l>

1. *Situation Analysis – How do I know if SanMark will work in my country?*
2. *Consumer Behavior – How can we understand sanitation consumers in target markets?*
3. *Sanitation Supply Chains and Business Models – How can we improve market systems?*
4. *Private Sector development - How do we improve capacity of local sanitation businesses?*
5. *Getting the Product 'Right' – How do we design affordable, desirable latrines that businesses can profitably produce and sell?*
6. *Enabling Environment – What roles and functions are needed in the new market?*
7. *Demand Promotion and Marketing – How do we reach rural target markets in san mark?*
8. *Equity in Sanitation Marketing - How can we support the market to reach the poorest?*
9. *Monitoring and Evaluation – How do we measure sanitation marketing progress?*
10. *Sanitation Marketing and CATS – How do we link approaches?*