

This is part of a series of project briefs discussing the activities, research findings, and field experiences of PATH's Safe Water Project.

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Sparking Demand for Household Water Treatment Products:

Lessons From Commercial Projects in Four Countries

Introduction

Since its inception in 2006, the Safe Water Project (SWP) at PATH has been seeking new ways to stimulate a robust and sustainable commercial market for household water treatment and safe storage (HWTS) products in developing countries. The project has explored how commercial market forces can extend access to meet the needs of low-income consumers and how promoting purchase and use of water treatment products is a key part of the strategy. PATH and its partners have undertaken a series of pilot projects to overcome distribution and marketing barriers that make it difficult for HWTS manufacturers to reach lower-income households and rural markets (Table 1).



PATH/Sara Watson

One of those barriers is the difficulty of generating demand for new and often unfamiliar HWTS products, whether durables like water filters or fast-moving consumer goods like chlorine disinfectants. Many elements of the pilot projects, including product design, pricing, and sales channels, greatly affected demand for the products. However, promotion—which encompasses all forms of communication used by sellers to attract potential buyers—is the primary method used to create interest in a product and stimulate consumers' desire to buy it.

In Cambodia as well as India, Kenya, and Vietnam, PATH tested various materials and activities to generate demand for water treatment.

Table 1: Description of pilot activities

Location	Business model	Product type and brand	Commercial partners	Date
Cambodia				
Kampong Cham province	Retail sales with coupons	Ceramic water filters (Tunsai and Super Tunsai)	Manufacturer: Hydrologic	March 2011–Aug. 2011
Kampong Speu province	Direct sales door to door and at village microfinance (MFI) meetings	Ceramic water filters (Tunsai and Super Tunsai)	Manufacturer: Hydrologic MFI: VisionFund	Dec. 2010–April 2011 (door to door); Feb. 2011–Dec. 2011 (MFI meetings)
India				
Andhra Pradesh	Direct sales at group meetings of MFI clients; revolving loan fund	Tabletop combination filter/purifier (Aquasure Xtra)	Manufacturer: Eureka Forbes Limited MFI: PSS - ACCESS	Dec. 2010–June 2011
Madhya Pradesh	Direct sales at group meetings of MFI clients, with cost defrayment	Tabletop combination filter/purifier (Pureit)	Manufacturer: Hindustan Unilever Limited MFI: Spandana	Feb. 2010–July 2010 (Nagda); Sep. 2010 (Neemuch district)
Tamil Nadu	Direct sales at group meetings of MFI clients, with consumer loans	Tabletop combination filter/purifier (Pureit)	Manufacturer: Hindustan Unilever MFI: Spandana	Aug. 2009–May 2010
Uttar Pradesh	Direct sales by mobile sales agents on bicycles selling product door to door and at weekly markets	Chlorine tablets (Aquatabs)	Manufacturer: Medentech Distributor: MART	May 2009–April 2010
Kenya				
Nyanza and Western province	Direct sales door to door, with water filter integrated into larger basket of goods	Ceramic water filter (Chujio)	Manufacturer: Chujio Nongovernmental organization: Safe Water and AIDS Project	Dec. 2010–June 2011
Vietnam				
Can Tho province	Direct sales by government health staff selling product door to door	Chlorine tablets (Aquatabs)	Distributor: Zuellig Pharma Vietnam Manufacturer: Medentech Sales force: Commune Health Stations	Oct. 2010–June 2011

This brief presents the strategic approach and framework developed by the SWP team for demand generation activities. This approach is based on a review of major marketing and behavior change

concepts and on an examination of demand generation strategies used to market goods such as toothpaste, cookstoves, and soap to low-income consumers around the world. The brief also describes how SWP pilots

in Cambodia, India, Kenya, and Vietnam have applied the framework to generate demand for various types of HWTS products.

A framework for demand generation activities

PATH's demand generation strategy developed from an understanding of consumers and the process that leads them to purchase and routinely use a product. The consumer purchase process described in commercial marketing¹ is grounded in well-established principles of psychology, sociology, and economics, and it aligns well with theories of health behaviour change.^{2,3}

Figure 1 merges several theories into a generic consumer purchase process; each stage is described in the box below. This simple model helped the SWP team understand the consumer experience in the pilot settings where product choices are few, media are limited, and consumers are relatively

unsophisticated. The team used the model to interpret market research, identify weaknesses in the consumer purchase process that could be addressed through sales and marketing, and guide investments in demand generation activities.

Household water treatment is a nascent market in the settings studied. In this situation, behavior change takes considerable time, and so does building a brand. Bearing in mind that the pilots only lasted a matter of months, the SWP demand generation strategy leveraged resources and relationships that PATH had already built through project activities in the pilot locations. Most demand generation concepts addressed one or more gaps in the consumer purchase process and were tailored to the

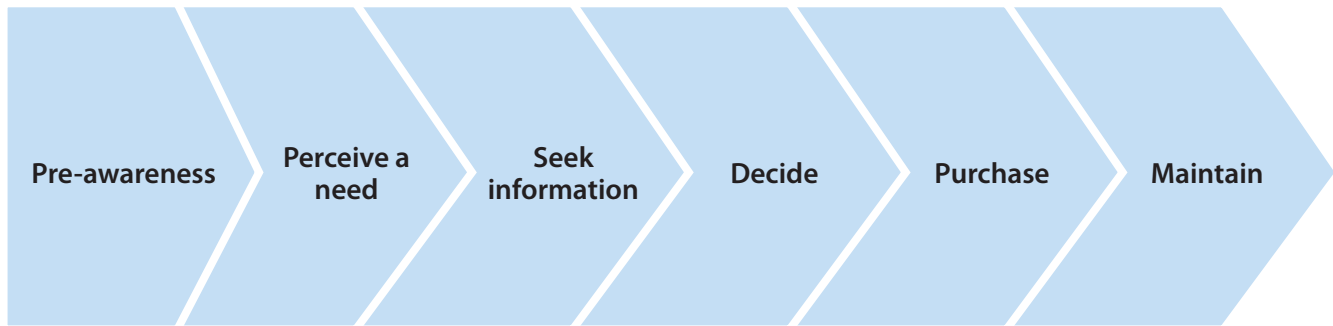
needs of a specific audience in a specific geographic area. The SWP team relied on existing and new consumer research to establish baseline behaviors; to select target audiences and describe their unique needs, preferences, and media habits; and to identify socio-cultural and relational factors that might influence HWTS behaviors.

Marketing and promotional activities were selected based on a landscape analysis that scanned existing programs and campaigns to identify promising concepts, or “bright spots,” related to demand generation for HWTS or similar products. As opportunities were identified, the SWP team evaluated them, assessed available resources, identified partners—such as manufacturers and MFIs—that

Stages in the Consumer Purchase Process

1. **Pre-awareness:** At this stage, consumers are not aware that there is a problem with the water available in their community, and therefore they are not interested in HWTS products. For example, baseline research for the pilot in Uttar Pradesh found that about 60 percent of respondents felt no need to treat their water.
2. **Perceive a need:** Although people at this stage perceive a need for treated water, their reasons may not be health related. In Andhra Pradesh, for example, PATH formative research found that messages about the health benefits of treating water did not resonate as well as messages about its aesthetic benefits (it produces clear, cold, good-tasting water), convenience (it makes life easier), and social aspirations (it signals status and modernity).
3. **Seek information:** Once consumers are interested in water treatment, they seek information about the products available: how they work, where they are sold, and how much they cost. What happens at this stage depends on the kind and quality of information available to consumers.
4. **Decide:** If consumers like what they hear, they may begin to weigh product options and decide which is best. If the price is too high, the choices too limited, or the process of making comparisons too arduous, the consumer may defer a decision.
5. **Purchase:** Once a decision is made, the consumer must be able to find the product at the right price. Novel financing strategies can generate demand. Pilots in India and Cambodia partnered manufacturers with MFIs to provide a financing option for interested consumers who did not have full cash payment in hand.
6. **Maintain:** Whether consumers use a product once or repeatedly depends on their experience with it. Do they find it easy to use? Do they like the way the water looks and tastes? Do family and friends support it? During the pilot in Vietnam, for example, many consumers discontinued using Aquatabs because they disliked the smell and taste of treated water.

Figure 1. Consumer purchase process



This model was used to help PATH understand the consumer experience in the SWP pilot settings.

could bring the concept to fruition, and implemented the concepts.

During the pilots, monitoring approaches were used to track progress and refine strategies. Feedback from salespeople and managers in the field, including anecdotal information, helped establish which approaches were working and which were not. Given that the pilots were designed to capture initial market and user experiences, it was important to set up a feedback loop and listen to users to understand how messaging should evolve. A suite of evaluation activities included questions related to consumers' awareness of a product, sources of information, and media exposure to assess the effect of demand generation activities. Endline evaluation results contributed to the SWP team's final assessment of what worked well and provided guidance for future strategies.

Baseline data collection for the pilots asked respondents whether they were likely to purchase a specific HWTS product at a given price point. While stated purchase intentions do not always translate into actual sales, it is the consumer perception most closely linked to the potential sale (more so than

brand awareness, for example). The intention to try information was useful in assessing consumer interest in different pricing and financing options prior to pilot launch. Purchase intent can also be used to gain insights into effectiveness of advertising when utilized as an indicator before and after implementing marketing activities.

Working at the brand or category level

Promotional activities can operate at two levels

- Brand-level promotions focus on specific products and tailor messages, strategies, and target audiences accordingly.
- Category-level promotions employ generic messages and strategies that promote the health benefits of clean, safe water and the practice of household water treatment, including a variety of methods.

Companies typically operate on the brand level, and the success of their enterprise often hinges on the effectiveness of their product promotion. Category-level campaigns are less common because they require a lot of coordination with competitors. In

most developing-country settings, HWTS is a nascent market and manufacturers are working to grow their share of the market.

Category campaigns are especially important where there is little perceived need for water treatment. Their safe water messages can trigger consumers' interest in water treatment products and make a difference for companies entering the HWTS market. By itself, however, a category campaign is not sufficient to trigger the purchase of a particular product. The pilots frequently operated on the brand level, with some investment in category promotion to generate awareness of the need to treat drinking water. This was primarily a function of partnerships with manufacturers to launch new distribution of their products to reach lower-income consumers.

Findings from SWP pilots in India demonstrate the importance of generic safe water messages to instill lasting behavior change. Two pilots in Tamil Nadu and Madhya Pradesh relied solely on brand-level promotion of Pureit water purifiers. While this approach generated high brand awareness and an uptick in sales, consumers had little appreciation of water contamination.



Wall paintings like this one in Andhra Pradesh, India were created to raise awareness of the need for safe drinking water.

Without a felt need for water treatment, correct and consistent use of the purifiers dropped to zero in a follow-up survey. In contrast, a later pilot in Andhra Pradesh complemented brand-level promotions of Aquasure water purifiers with a category campaign to raise awareness of the need for safe drinking water. Consumers got the message: when forced to stop using the purifier due to filter recall, over three-quarters of them shifted to an alternative product, subsidized bottled water, rather than return to drinking unsafe water. Of course, this was only possible because there was another competitively priced and widely promoted method available on the market.

Determining the target audience and messages

Effective promotional activities tailor the message and the communication channel to a specific target

audience. Segmentation research can determine what portion of the population should be targeted, based on the likelihood that they will purchase the product being promoted. An understanding of that target audience enables marketers to craft an effective message and to select communication channels that can successfully deliver that message.

In the Vietnam pilot, consumer research concluded that a segment called “practical nurturers” was the audience most likely to change their water treatment behaviors and reap the health benefits associated with HWTS. Consumers in this segment are defined by the high value they place on the well being of their family, especially young children. Because practical nurturers see treating water as a way of taking care of their family’s health, health messages are likely to be effective with this audience. With low disposable incomes, they are less likely to be motivated

by messages about status and technology. Segmentation research also suggested that television and interpersonal communication were both good ways to reach this audience. Practical nurturers watch television four days a week, on average, and they are more open to advice from family members, friends, nongovernment organizations, and salesmen when buying household goods than any other segments of the population.

Although the broader goal of the SWP is to reduce waterborne disease and improve the health of low-income households, relying solely on health messages is usually insufficient for sustained treatment. Research shows that a health benefit is often not the sole or main motivator for HWTS; rather, aspirational goals may be.^{4,5} In Cambodia, for example, the television commercial used images of people, dress, settings, and behaviors to signal status and modernity and the song mentioned how easy the filter was to use. A number of SWP pilots employed messages conveying images of a happy, thriving family as an alternative to a purely health-oriented message.

While aspirational marketing may maximize the initial uptake of a product, pilots in India suggest that health messages are one important element in ensuring correct, consistent, and continuing use. Aspirational messaging prompted an initial burst of sales of the Pureit water purifier in Tamil Nadu, but afterwards sales of the replacement parts and consumables needed to keep the purifier working dropped off. Investment in safe water messaging coupled with loan

Pilot activities in Kenya

In Kenya, PATH partnered with the Safe Water and AIDS Project, which promotes health in rural areas by marketing vitamins, condoms, mosquito nets, and other goods through local vendors. Ceramic water pot filters from a local manufacturer were added to the basket of goods that vendors sell door to door and through community presentations, an approach sometimes called the “Avon business model.” The pilot tested two price points and a layaway purchasing option for the filter.

Because it was difficult for vendors to carry around the bulky and fragile filters, public product demonstration stations were established at health facilities, government offices, schools, and other public venues. These gave consumers an opportunity to interact with the filter and see how it worked in a convenient location. Vendors’ phone numbers were prominently displayed at these demonstration stations so potential customers could contact them. To help generate demand, vendors also gave product demonstrations at weekly markets in rural areas and made community presentations to village leaders, health workers, and community groups. Following these presentations, it was more common for middle-class people with some disposable income to purchase filters, even though lower-income households were the target of the pilot. Other promotional tools included brochures and posters.



Posters like this one help generate demand for the Chujio water filter in Kenya.

Pilot activities in India

There were four SWP pilots in India, each in a different state. The first one, in Uttar Pradesh, deployed entrepreneurs on bicycles to sell Aquatabs chlorine tablets to households and community groups, at weekly markets, and through retail kiosks. The bicycle entrepreneurs functioned as educators, salesmen, and distributors. A number of promotional activities supplemented their efforts. Two intensive communication campaigns disseminated messages through entertainment-education approaches such as street theater, product demonstrations, microphone announcements from vans at weekly markets, and radio spots promoting the benefits of water treatment and Aquatabs. A promotional scheme offered consumers an umbrella with a 90-tablet purchase of Aquatabs, and stickers, danglers, and other promotional materials were widely distributed.

Two pilots in Tamil Nadu and Madhya Pradesh promoted Hindustan Unilever’s Pureit water purifiers. The former offered consumer loans from an MFI and the latter used a cost defrayment scheme to lower the price of the purifiers. The last pilot, in Andhra Pradesh, promoted Eureka Forbes’ Aquasure combination water filter/purifier, using a revolving fund to back microfinance loans. In all three pilots, the manufacturers’ sales force worked together with MFI loan officers to conduct product demonstrations during group meetings with MFI clients. Flipbooks and poster stands were developed for salespeople to use at the product demonstrations, and they were the key medium for raising awareness about safe water. Television commercials in Tamil Nadu and Madhya Pradesh promoted the Pureit brand. In contrast, an array of demand generation activities in Andhra Pradesh—including wall paintings, calendars, danglers, display stands, and banners—promoted general awareness about safe water and the uptake of other HWTS products as well as Aquasure.



Wall paintings, danglers, and display banners were created to encourage household water treatment in Andhra Pradesh, India.

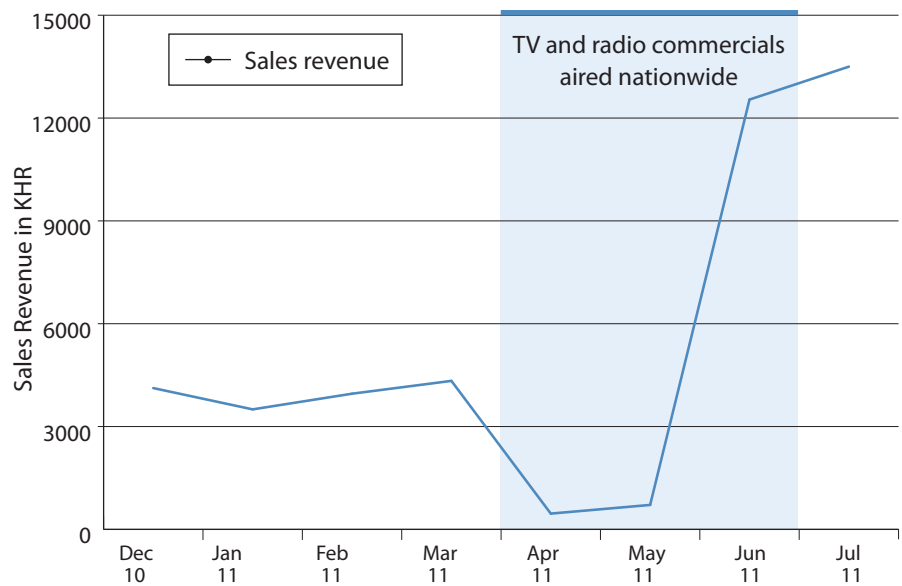
options and the continued presence of a sales entity in the community to ensure that the health messaging is communicated consistently and can swiftly address consumer complaints and questions might have encouraged Pureit owners to buy these supplies and continue using the product.

Experience from Vietnam shows how important it is that messages recognize and address barriers to HWTS without misleading consumers. A new version of Aquatabs with less of a chlorine taste and smell was imported especially for the pilot, but some salespeople misinterpreted the distributor's initial promotional messages. They mistakenly told consumers that Aquatabs did not have any smell or taste and lost credibility when this proved to be untrue. Indeed, the leading reason for discontinuing use of Aquatabs was the smell of treated water. Framing the message differently could have made it easier to sell Aquatabs and convince users to continue buying the product. For example, messages could have stressed that the smell was evidence that treated water was safe to drink, or they could have advised consumers on how to reduce the smell, for example, by treating water overnight.

Choosing communication channels

There are a wide variety of ways to deliver promotional messages, ranging from radio and television broadcasts, to traditional songs and dances, to a salesperson's direct pitch to a customer. Marketers usually divide them into two groups: above- and below-the-line advertising.

Figure 2. The relationship of the advertising campaign to super tunsai sales in Cambodian retail settings



Total sales doubled in retail settings during an initial television and radio commercials campaign in Cambodia.

Above-the-line advertising uses communication channels that reach a broad general audience, such as radio, television, newspapers, magazines, and billboards. It is a good way to raise the population's awareness of water treatment and HWTS brands. The SWP pilot in Cambodia shows that mass media can also influence consumer purchase decisions: a sharp increase in super tunsai ceramic purifiers in retail setting may be attributed to the launch of a memorable television and radio commercials campaign (Figure 2).

But other forms of above-the-line advertising may not have had as much impact. In Vietnam, billboards promoting Aquatabs were placed at commune health stations to reinforce their involvement in the pilot; billboards were also placed at schools so that children would transmit the promotional messages to their families at

home. While the billboards raised awareness of the Aquatabs brand, there was no perceptible increase in sales as a result.

Below-the-line promotions use non-media communication channels that reach a specific audience at a given point in time; some examples are telemarketing, road shows, and displays in shops. Unlike above-the-line advertising, they can target specific consumer groups and tailor messaging in a more personal manner, which heightens their impact. Nearly all of the pilots relied heavily on this approach. In Vietnam, for example, a large social marketing event in each commune kicked off the demand generation campaign for Aquatabs. Poor households and households with young children were invited to attend the events, which provided product samples along with messages stressing the importance of properly treating and storing water. Unfortunately, few

households attended these events because the venues were small and the communes too spread out for everyone to come. Anecdotal evidence suggests that smaller, more frequent, informal events spread throughout the commune may have been more effective at engaging the audience, reinforcing the message, and targeting invitees.

All but one of the pilots used live sales presentations—with individual households or at group meetings—to prompt purchases. There are a variety of ways to maximize the effectiveness of this direct sales approach. Recruiting the right individuals for the job makes a big difference:

- In Kenya, sales ranged from 3 to 115 filters in each of the ten regions. The top performing regions were headed by highly motivated field officers who devised their own marketing ideas and promoted the filters to vendors. Within the regions that performed best, a small number of vendors sold a large quantity of filters.
- In Vietnam, the best salespeople proved to be women aged 50 to 59 who were not full-time employees; they sold more than twice as many water filters, on average, as other salespeople. Managers used this profile to replace underperforming salespeople and increase sales.

In Vietnam, the pilot recruited health workers to sell water filters because research shows that they are trusted sources of health information. The pilot in Kenya also benefited from this strategy by placing some product demonstration centers at health clinics; sick people may be more open to behavior

change, especially when endorsed by health professionals. As a result, some rural vendors began selling directly to patients visiting the facilities where the demonstration centers had increased product familiarity. An unexpected result was that a number of health clinic staff purchased the Chujio filter.

Pilots in Cambodia, India, and Vietnam improved the effectiveness of salespeople by equipping them with interactive flipbooks that served as a sales tool and facilitated their conversations with potential customers. Flipbooks are an effective way to communicate and build rapport with customers, rather than just lecturing them about a product's features and benefits. Flipbooks tell a story that is easy to understand and draw customers into the conversation. In Vietnam, flipbooks reportedly elicited more interest from households. One salesperson reported that: "With the sales flipbook, I can sell more Aquatabs. Messages conveyed by the pictures and photos in the book are stronger than my words. It helps strengthen my words and the trust of the people as well." Print materials should be tailored to local audiences, a process that takes time and careful planning. Given the length and complexity of designing flipbooks, the pilot in Kenya opted for leaflets and posters instead. Leaflets and brochures also have the advantage that interested customers can take them home and discuss water treatment methods with family and friends.

The flipbooks also served to enhance the credibility of salespeople in the community, as did providing ID badges. In Vietnam, for example, health workers selling Aquatabs frequently worked outside of their

usual territories, so they did not have established relationships with local people. Providing flipbooks and ID badges made them appear professional and trustworthy.

Pictures and words are much less persuasive than a product demonstration. Consumers want to see how a water treatment product works and taste the water before making a purchase, especially of costly filters and purifiers. By far and away the most successful demand generation strategy in Kenya was placing water filters at conveniently located public sites where vendors could demonstrate their use to potential customers. Having a real unit on display gave consumers an opportunity to interact with and evaluate the product prior to purchase. Monthly sales of ceramic water filters increased by 70 percent immediately after these stations were established. Location matters, however. The Kenya pilot also conducted product demonstrations at the rural markets where most people buy staples. While these demonstrations generated interest and awareness, they led to few sales because people do not carry enough money to these markets to make large, unplanned purchases.

In some settings, group sales events may be more efficient and effective than presentations to individual customers, especially when key opinion leaders in the community offer support. In rural areas especially, opinion leaders have the ability to influence behavior by directing product perceptions and advocating for products they believe in. They can also gather the community together for meetings and follow up with villagers afterwards. In Cambodia,

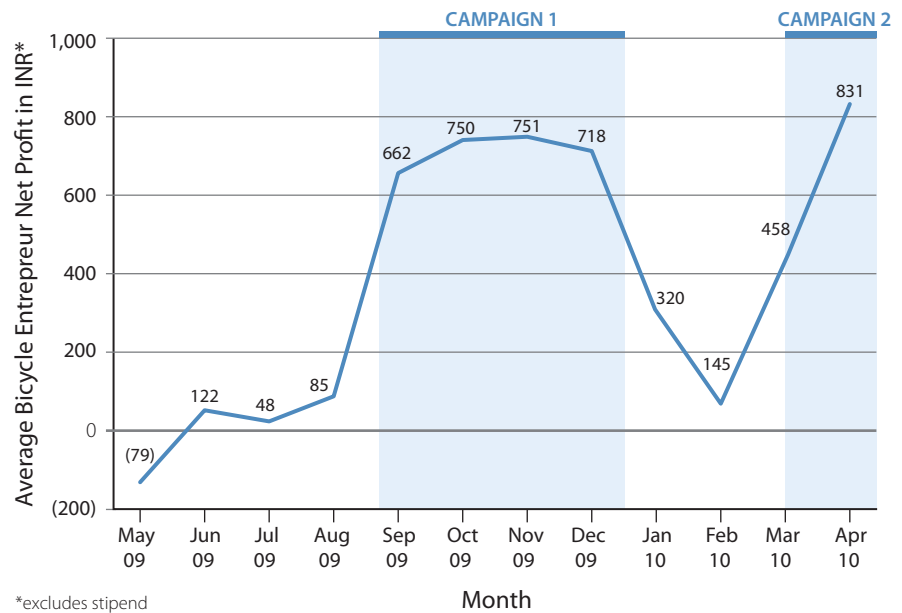
for example, salespeople found they could not reach as many people going door to door and sold few filters. The approach was discontinued in favor of group sales meetings organized by a local MFI representative which aggregated potential consumers and provided a financing option. Sales at these meetings were considerably higher when a local opinion leader, such as a village chief, supported the salesperson's efforts. In Kenya, vendors of ceramic water filters actively tried to obtain the approval and buy-in of community leaders by giving presentations to village leaders, health workers, and community groups.

Planning and pretesting

Thorough planning and pretesting is essential to maximize the impact of promotional activities. The pilots in Cambodia, for example, field tested two concepts for a proposed television commercial. One retold a popular Khmer folktale, while the other told the story of a little girl who tries to take on her mother's chores around the house, the so-called "Little Helper." Individual interviews were conducted with 34 rural mothers, since they are the ones most likely to initiate the purchase of an HWTS product. Both storyboards had a positive reception, but 22 of the mothers favored the "Little Helper" concept, which elicited strong, positive emotions in mothers. On average, mothers were willing to pay almost 14 percent more for a Super Tunsai water filter after seeing "Little Helper."

Even when little time and money are available, limited pretesting can prevent uninformed decisions and expensive mistakes. In Vietnam,

Figure 3. Trends in bicycle entrepreneurs' net profit



Demand generating activities had a positive affect on the sales experienced by bicycle entrepreneurs in Uttar Pradesh, India.

for example, scheduling difficulties meant that focus groups could not be completed for all marketing activities, including a television commercial conveying the importance of properly treating and storing water for one's health. While initial informal discussions with vendors suggested that this approach held promise, more extensive use of focus groups would have revealed that:

- The featured celebrity, the actor Xuan Bac, was not as well known in the Mekong Delta, where the pilot took place, as originally expected.
- The target audience tends to watch local television channels rather than the national channels chosen to broadcast the commercial.
- The scheduled broadcast time of 6 p.m. is too early for urban families and probably

also for rural families.

In this instance, PATH joined a consortium of UNICEF, Lien Aid, and the National Center for Rural Water Supply and Sanitation, which had already decided to employ the UNICEF Goodwill Ambassador, Xuan Bac. This opportunity presented efficiencies and saved money, but there was a trade-off: PATH had to use the media agency that represented the actor instead of competitively selecting an agency based on competence, experience, and professionalism. The media agency representing the actor was not always responsive to requests and instructions from PATH, and it also lacked access to the viewership data needed to measure the effectiveness and reach of the television commercial. This experience demonstrates the importance of carefully selecting a media partner that has experience

Pilot activities in Vietnam

In Vietnam, PATH partnered with Zuellig, a pharmaceutical company that was already marketing chlorine tablets for HWTS at a limited number of urban retailers. The pilot sought to promote and distribute a new, better-tasting version of Medentech's Aquatabs in rural areas. A segmentation study found low awareness of safe water issues and little familiarity with HWTS products. To overcome this barrier, the pilot worked with government health workers—who are responsible for educating villagers about health issues and are a trusted source of advice—to increase their visits to households as a sales strategy.

One-day social marketing events targeting poor households and households with children under five years of age were held in each commune to launch the pilot. They distributed information about hygiene, sanitation, and the use of Aquatabs; promotional items; a month's supply of Aquatabs for trial use; and, in some cases, a free water storage container. Staff from commune health stations followed up with monthly household visits during which they reinforced health and hygiene messages and sold Aquatabs.

Other promotional activities sought to make the Aquatabs brand known to the general population. Representatives from the district medical centers were given samples of Aquatabs to encourage them to advocate for the product. Advertisements for Aquatabs were broadcast on commune loudspeakers and on regional television. Billboards advertising Aquatabs were placed outside of commune health stations, elementary schools, and District Medical Centers. Other promotional activities included a television commercial aired nationwide and district information, education, and communication events with musical performances, a comedy act, and speeches.



PATH

PATH developed this flipbook to generate demand for HWTS in Vietnam.

Pilot activities in Cambodia

In Cambodia, PATH partnered with Hydrologic, a manufacturer and distributor of ceramic water purifiers, to design a more attractive and modern looking product. The two pilots sold both the original, cheaper product (the Tunsai or "rabbit" purifier) and the redesigned, more expensive product (the Super Tunsai purifier). In Kampong Cham province, the purifiers were distributed through retail channels at different price points. In addition to full-price sales, two sets of discount coupons were tested: one lowered the sales price by about 20 percent and the other by about 40 percent. The pilot in Kampong Speu province used a direct sales model, with the purifiers initially sold door to door by salespeople working for the manufacturer. However, this approach proved less effective than group sales meetings which the salespeople ran and organized in cooperation with the network of local village coordinators of another PATH partner group, VisionFund, a microfinance institution that provided consumer loans for filter purchases.

Both pilots used many of the same promotional materials and strategies, beginning with the development of a new name (Super Tunsai), logo, decal, and packaging for the redesigned water purifier. Signs were posted at the point of sale in the retail sales pilot, while the direct sales pilot distributed a flipbook to use during sales presentation, business cards, shirts, and flyers to salespeople. Television and radio spots were aired in the pilot area, and salespeople reported that they regularly heard children in villages singing the song from the commercials. As the pilot in Cambodia was ongoing as this brief went to press, a separate case study of the microfinance model and redesign of the Super Tunsai including data from the endline evaluation is planned for the first quarter of 2012.



PATH/B. Mandell

PATH and Hydrologic worked together to create a new logo, decal, and packaging to increase demand for the Super Tunsai in Cambodia.

in the region and with the targeted consumer segment, as well as access to the data needed to plan and assess proposed marketing activities.

Allocating resources

The choice of communication channels depends not only on the goals of a demand generation strategy but also on time and budget constraints. Resources should be allocated strategically to maximize the impact of demand generation activities. This requires identifying activities that yield the greatest return on investment, that is, the greatest amount of revenue generated for each dollar spent, considering both recurring and initial costs. Although it was not always possible for the pilots to measure return on investment for each promotional activity, feedback from managers and consumers made clear which activities had the biggest impact. In Kenya, for example, public demonstration centers and community presentations were undoubtedly the top performing demand generation activities, while market day promotions had far less impact on sales.

Even if a promotional activity succeeds in boosting sales, it is not worth continuing if marketing costs are greater than the additional revenues produced. For example, the pilot in Uttar Pradesh conducted a wide range of demand generation activities including two rounds of intensive campaigns, a radio spot, street theater, and an offer of a free umbrella with an Aquatabs purchase. Average net profits for bicycle entrepreneurs rose when promotional activities were offered and fell when they ended (Figure 3). Because of the

high cost of the promotional activities, however, return on investment remained negative.

Insights and lessons learned

In most cases, HWTS products are a hard sell. With few exceptions, demand for HWTS is nascent and sales remain very low among low-income consumers. Because most households are in the earliest stages of the consumer purchase process, brand-level promotion is not sufficient. It must be accompanied by category promotions that raise awareness of the need for water treatment.

Male members of the household are an important audience. While women are usually the primary target audience for HWTS promotions, evaluation data from the pilots suggest that male household members are important gatekeepers to HWTS purchases. Husbands and other men often have a say in decisions to purchase and maintain durable goods like water filters, and they also play a role in maintaining water filters.

While mass media can help raise awareness, interpersonal communication is critical to purchase decisions. In every direct sales pilot, a small number of salespeople generated most of the purchases, demonstrating the importance of recruiting motivated and persuasive individuals for the job. Support or endorsement from trusted advisors and opinion leaders, such as health care providers, village chiefs, and teachers, is also key to the purchase of HWTS products. Social support also helps maintain HWTS practices over the long term. But it is difficult and costly

to reach large numbers of people with interpersonal communication. For durable products, especially when microfinance plans are available, group sales events are a cost-effective solution.

A combination of health and aspirational messaging is needed. Evaluation results consistently show that a perceived health need for water treatment is a necessary condition for purchase; health messages also encourage consistent and continuing use. But the evaluations also show that the aspirational appeal of the product being promoted is an important motivational factor in HWTS purchases. Hence, communications should include both health and aspirational messages.

Product demonstrations are one of the most effective ways to promote water treatment products. Product demonstrations provide tangible evidence of improved water quality and are, therefore, both memorable and persuasive. They can be conducted in small groups or by establishing public demonstration stations.

Active monitoring during implementation is valuable. Evaluations at the end of a pilot may come too late to have an effect, unless there are plans to continue the intervention. Collecting feedback from all participants—including staff members and partner organizations—throughout a pilot enables managers to make changes that increase its effectiveness. For example, active monitoring led to the cancellation of the door-to-door direct sales pilot in Cambodia so that additional resources could be devoted to a more effective group sales pilot.

Household and market research is useful before, during, and after demand generation campaigns. Segmentation research provides the detailed information about consumers needed to select a target audience, design effective messages, and select communication channels. It provides an understanding of the target audience's unique needs, preferences, and media habits and identifies the positive and negative social, cultural, environmental, and relational factors that might influence its behavior. Concept testing and pretesting can verify specific marketing messages and tactics. Once a campaign is launched, research can monitor progress and help refine strategies that appear to be off course. After a campaign ends, research is used to evaluate its success and assess impact.

Conclusion

Purchase and sustained use of household water treatment products is influenced by a number of triggers. Common triggers uncovered during the SWP pilots included the availability of financing for durable products, having a trusted social influence at or around the time of sale, and product appeal. Product demonstrations of filters and purifiers also led to sales because they allowed consumers to interact with the devices and ask questions. Involving other family members in group sales meetings helped sustain use of the product. However, these triggers worked best once potential consumers felt that the product could solve a perceived problem or meet a need in their lives.

While the SWP pilots have shed some light on how to successfully

promote commercial HWTS products to lower-income consumers in developing countries, much remains to be learned. For example, one opportunity is the potential for category campaigns that bring multiple manufacturers together along with other partners such as government, nonprofit organizations, donors or United Nations agencies. Another opportunity is incentivizing word-of-mouth marketing and trusted source recommendations that may yield better uptake than traditional promotional channels. Community-based distribution programs and direct sales models are particularly well suited to capitalize on interpersonal strategies. Ultimately, the greatest opportunities for learning and market expansion will come in situations where consumers are presented with multiple, comparable product options.

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