Consumer Research Interventions

Consumer research studies, India: 2010-12 Phase 1

Study

Objective

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Baseline survey in Warangal and Nalgonda, 2010	- Understanding socio-economic status, prevailing water related practices and attitude - Assessing market and demand, methods to engage consumer
Understanding local demand drivers, 2012	- Studying Demand Drivers for Consumption of Safe Drinking Water

Baseline survey in Warangal and Nalgonda,2010

Objectives :

To study the socio-economic status of the community

Market and demand assessment for a CSWS[1]

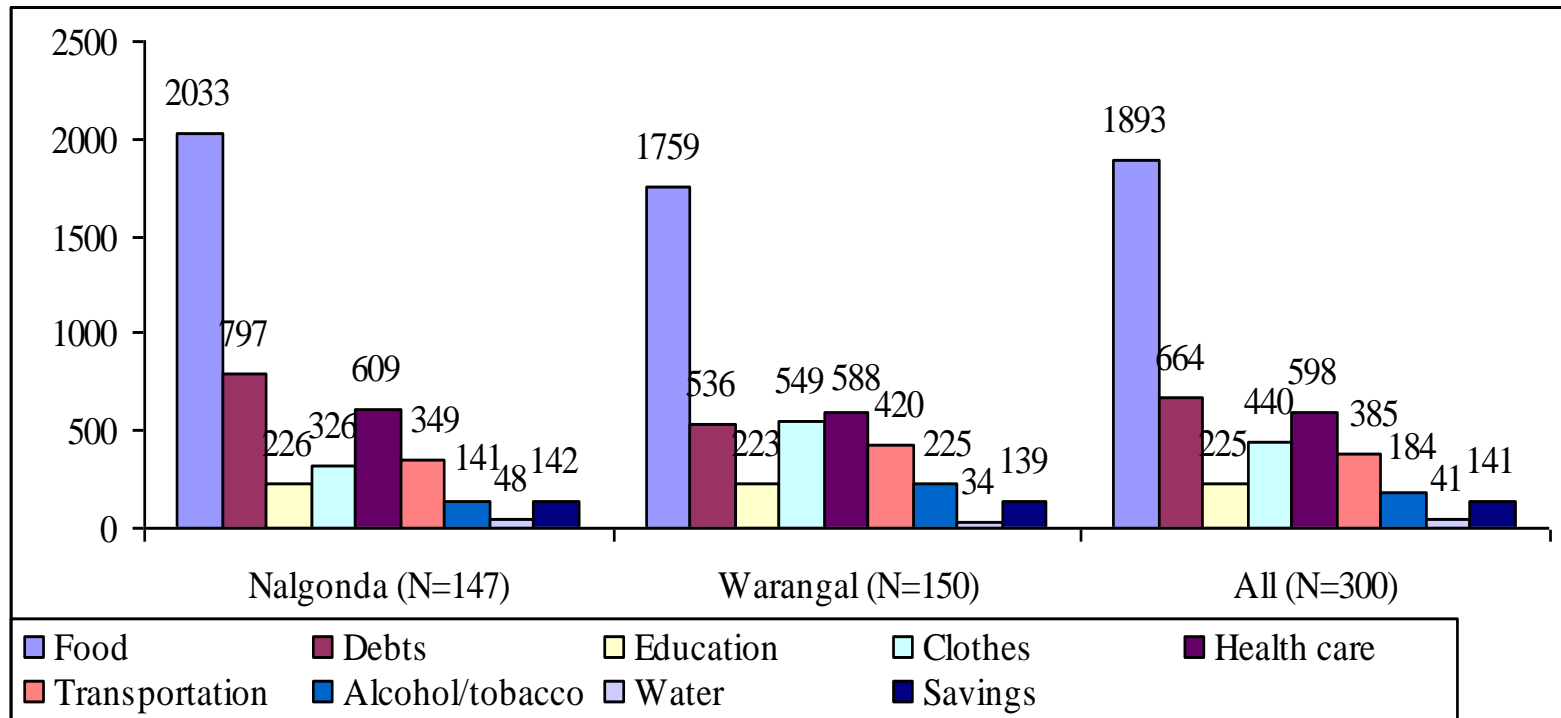To understand prevalent attitude and practices associated with water

Establish best practices for initial consumer engagement

Baseline survey in Warangal and Nalgonda,2010

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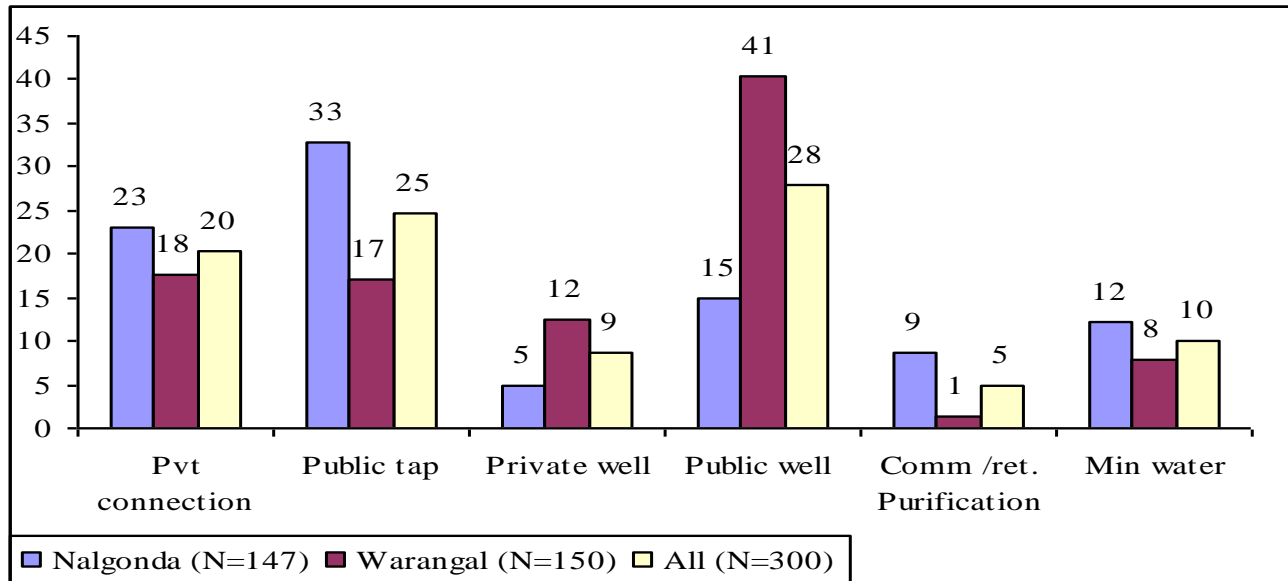
Key insights

Baseline survey in Warangal and Nalgonda,2010

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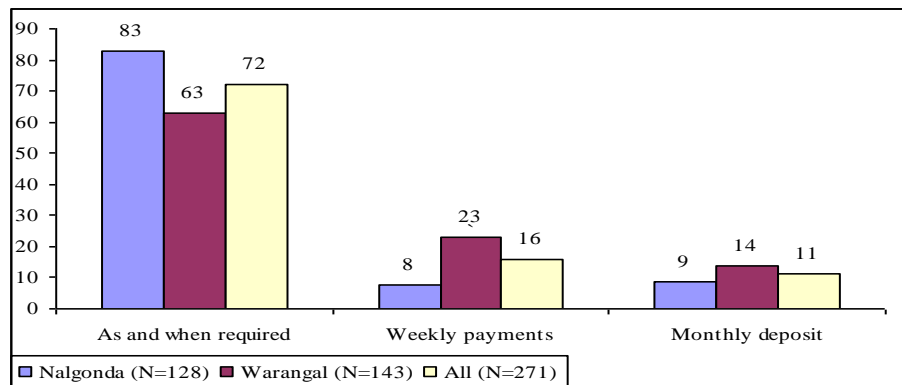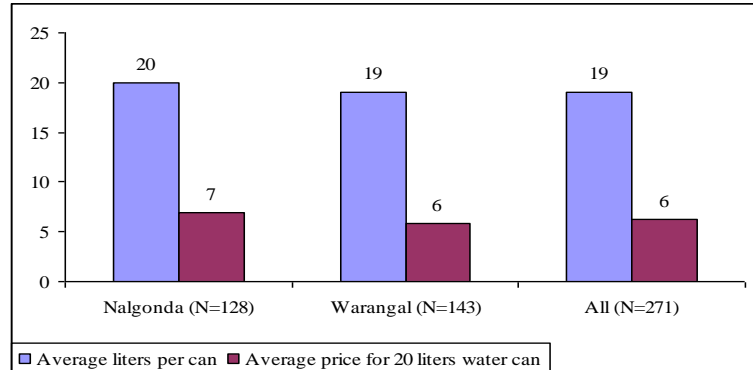To understand prevalent attitude and practices associated with water

Key insights

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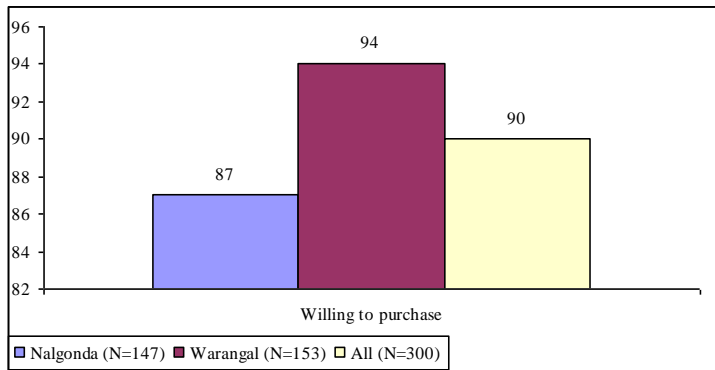
Baseline survey in Warangal and Nalgonda,2010

Objective

Establish best practices for initial consumer engagement

Key insights

- Significant push required to make people understand that spending on safe water is very likely to lead to reduction in expenditure on health related issues
- Local level health centers, meetings to be leveraged for spreading awareness about the benefits of using safe water
- Television /mobile ads, text messages to spread information about kiosk

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Understanding local demand drivers, 2012

Area of concern/focus	Finding	Action taken
Local registered medical practitioner (RMP)	RMPs fears losing 'business' ,spread false propaganda against SWN product	SWN aligned with RMPs pre-launch; invited to kiosk launch ceremony
Health	ASHA and Anganwadi workers play an important role; their opinion trusted by villagers in health matters	Engagement initiated- ongoing information and program exchange
Convenience of accessibility	Delivery at door step needed especially for those families where the younger ones have migrated to urban centres	Distribution routes started
Discontinuing iJal water usage	Users perceived ill health effects due to difference in taste from ground water; suspected heavy chemical usage	Explained functioning of reverse osmosis, also conducted plant visits for villagers

SWN Consumer Researches, 2013-2016 Phase 2

Date	Geography	Type of Research	TG	Objective
2013	Warrangal	Evaluation of Demand Generation Package, both qualitative and quantitative	Multiple Stakeholders	Qualitatively, test and refine consumer and other stakeholder message and & Concept Quantitatively assess the success and failures of the campaign Bring forth recommendations for further success
2014-15	Bhandara - Rural	Two rounds of cross–sectional study among a random sample in the villages, where iJal stations are set-up. Multiple rounds of research	Adult Males & Females in sample household	To understand Impact of Consumer Activation activities on iJal Adoption, Perception, and Usage Habits
2015	Vizag – Urban	One time study across 6 slums in Vizag, among households and current SWE operators	Adult Females, the key Decision Maker, Operators	To understand demand, current supply, and habits and perceptions among households, and current supply situations among SWE operators
2015-16	Hyderabad, Mumbai & Delhi	One round of quantitative research among slum households, which have existing USWE stations	Adult Females, KDM	Assessment of current water sources, habits and attitudes, as well as acceptability to USWE

The Demand Generation Package Research, 2013

Experiential Marketing:
Program Development
Training the Trainer

Qualitative Research: Testing and Refinement

Message and Concept
Program and its Tools

Quantitative Research
Measure immediate and short term impact of demand generation packages
Stage 1: Screening – Baseline
Stage 2: After Concept Sell – Concept Evaluation
Stage 3: After Inauguration – Attitude, Trial & Behavior Impact
Stage 4: After Maintenance – Adoption, Engagement & Loyalty

DIALOGUE
FACTORY

safe water
network
Report Findings

Demand Generation Impact Assessment:
Pre Research among villages in SRTT Cluster

January 2014

IMRB
International

IMRB

IMRB
international

Demand Generation Package

CONSUMER ACTIVATION
- LOU – AV on Tablet
- Consumer - Electrolyser Test
- School – Periodic Awareness Program

Research Outcome

Development of Marketing Package (Qualitatively assessed)

- Selection of message on theme health instead of prosperity

- Identification of components that worked- their utilisation and amplification

  - Electrolyser Test

  - Messages on Tablet

  - School kids as agent of change

Understanding consumer KAP and adoption hurdles (Quantitatively determined)

- Dispelling myth of reverse osmosis treated water to consumer

- Need to reconsider role of KOL and their effectiveness

- Increase engagement with local RMP

- Engagement with women to be increased

- School kids to be leveraged as agents of change

- Using new marketing techniques

Research Learning – Demand Generation

Date	Geography	Type of Research
2013-14	**Warrangal – Rural**	Literacy is low, and therefore perception build-up has taken longer time. With multiple rounds of Consumer Activation activities, there is strong awareness for iJal. The most recalled activity was the Electrolysis Test. Trials are average to high, and conversion to regular consumption is strong. However, iJal mostly used for drinking, much less for cooking. Worryingly, the net proportion of regular users constant indicating that trialists are increasing at a low rate, and some regular users are moving out. Also perceptions seem to be weakening over time.

Evaluation of demand generation efforts

QUALITATIVE ASSESSMENT

Instruments used	Target audience	Connect established
Tagline messages ▪ Health ▪ Prosperity	Consumers	✓ ✗
Tools ▪ Electrolyzer ▪ Tablet	Consumers	✓ ✓
For branding ▪ iJal signage ▪ iJal station signage ▪ Direction boards	Consumers	✓ ✓ ✓
Collaterals ▪ Canopy ▪ Pamphlets	Consumers	✓ ✗

Instruments used	Target audience	Connect established
Spiel	▪ *Head of village level self government* ▪ *RMP* ▪ *Teachers* ▪ *ASHA worker* ▪ *Anganwadi* ▪ *Oprator*	✓ ✓ ✓ ✓ ✓ ✓
Engagement program	▪ *Head of village level self government* ▪ *RMP* ▪ *Teachers* ▪ *ASHA worker* ▪ *Anganwadi*	✓ ✓ ✓ ✗ ✗

SWN Consumer Researches, 2013-2016
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2015	**Vizag – Urban**	**One time study across 6 slums in Vizag, among households and current SWE operators**	**Adult Females, the key Decision Maker, Operators**	To understand demand, current supply, and habits and perceptions among households, and current supply situations among SWE operators
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Research Learning: Evaluation Assessment

Date	Geography	Type of Research
2014-15	**Bhandara – Semi-Rural**	**The villages covered in Bhandara district were largely semi-urban. Consumers there were more educated than Warrangal, and were conscious of need for quality water. Awareness of iJal was very strong, and almost everyone had very strong quality perceptions about iJal. However, registration was low at 16%, the major barriers being distance, carrying convenience and price. In such a large area, need to create additional distribution points in order to increase convenience and higher adoption. Also free-sampling will help in taste development among non consumers thereby improving the chances of conversion**

SWN Consumer Researches, 2013-2016
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Research Learning – KABP of Urban Slums

Date	Geography	Type of Research
2015	**Vizag – Urban**	Households have access to multiple sources of water, and most households have taps installed at home. Even though consumers complain of quality of water available, the biggest pain point which drives satisfaction is sufficiency of water. Tap water to most households is available for less than half an hour. Almost all consumers are therefore willing to pay Rs. 3 for 20 liters. Among the current Operators, had high expectations of profitable investments, with free land and supply of water. However with bad quality of input water, not enough traffic, there is pressure on margins, leading to disillusionment.

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Research Learning – USWE Current Status & Future Feasibility

Date	Geography	Type of Research
2015 – 16	**Delhi, Mumbai, Hyderabad**	• Low salience for RO water among non RO Users, and certainly not top of mind. Conversion from Availability to Trial is low for RO, where the residents have a multitude of sources and use them for their daily water requirements • RO water enters a household for drinking purposes, but is also used for cooking – 65% of the user households claim to use RO for cooking , Strong perception towards RO water • Reasons for non trial of RO especially among Ground Water and Tanker users, mostly around expensiveness.. Need to create value markers for RO water to encourage trials • Missing school / college / work due to illness is high at around 50% with an average absence of 3 days – this is least for RO water users • Expense and Convenience are big factors in choice of Water source; even among RO users, nearly half will shift to Tap water, and nearly 75% will shift to an inexpensive source, if made available. However, when made conscious of the quality difference, the choices narrow down to Tap water & RO water • In case of non RO users, Tap water remains the source of choice… even when made aware of the quality differences