

Why Invest in Consumer Insights?

A foundation's perspective

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Key messages

- > There is an urgent need to reinvigorate food systems and improve the quality of the diets consumed by children, adolescents and pregnant and lactating women worldwide.
- > Introducing climate-friendly, sustainable, nutritious products into the marketplace will play a key role in improving diets; however, consumers need to be motivated to demand and consume such products.
- > In the field of nutrition, we have often relied on traditional top-down approaches, such as health promotion and information education and communication, to shift diets and change health behaviors.
- > Generating a deep understanding of the target consumer and using social marketing principles to generate demand can be an effective way to reach consumers, particularly those who are at the 'base of the pyramid.'

Introduction

Feeding the world is one of the greatest challenges that we face. Over 821 million people, or one in nine people worldwide, endure hunger every day – a figure that has been on the rise for the past 3 years.¹ Beyond suffering hunger, an additional 1.3 billion people do not have regular access to safe, nutritious

and sufficient food.¹ Poor-quality diets contribute to all forms of malnutrition: stunting, wasting, micronutrient deficiencies, women's underweight, and obesity among all age groups and in every country worldwide.² Pregnant women, new mothers and children in low- and middle-income countries bear the brunt of the disease burden associated with malnutrition. The estimated cost of the 'triple burden' of malnutrition to the global economy could be as high as US\$3.5 trillion per year, or 11 percent of global GDP.³

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Food systems play a vital role in delivering safe, affordable and sustainable high-quality diets. However, in many of today's food systems, nutritious foods are not available or affordable for many people, particularly lower income consumers. A common feature of our food systems is the increasing prevalence of highly processed foods that are cheap and of low nutritional value.⁴ Recent data has shown that up to three-quarters of Asian children and half of African children are now consuming unhealthy foods and sugary drinks in the second year of life.⁵ This is against a backdrop of increasing environmental degradation, biodiversity loss and climate change. Business as usual is not working, and the recently published EAT–Lancet Commission has called for a food system transformation to improve not just diets, but the environmental aspects of the food system as well.⁶

Considering these complex challenges, there is an urgent need to make food systems work better. This includes increasing the availability of affordable, nutritious foods and introducing

new and sustainable products into the marketplace. However, as with any product, target consumers need to be motivated and inspired to purchase and consume them. The food industry has been hugely successful at intensely marketing unhealthy, highly processed foods to stimulate consumer demand.⁶ These same techniques and tactics can be used to promote and influence consumers to choose healthy and nutritious products.

Placing the consumer at the center

Generating consumer demand in the public health sector has historically taken a top-down approach. In nutrition, we have often relied on health promotion and information education communication, which primarily uses information and education campaigns to shift diets and change health behaviors. These approaches have evolved into more audience-focused behavior change communications, but they still rely on communications as the main lever for change. Alternatively, social marketing refers to the application of commercial marketing principles to influence target audience behaviors, and is a much broader and more comprehensive approach that can be applied in both public health and market-based models.⁷ The key difference between traditional approaches and social marketing is that the goal of social marketing is to change behaviors, rather than just raising knowledge and awareness. It actively engages with the consumer, places them in the middle, and listens to their needs and desires first.

“The goal of social marketing is to change behaviors”

Social marketing employs a systematic approach that consists of the ‘4Ps’ of product, price, place and promotion.⁸ It is about delivering the right product, at the right place, at the right price, at the right time, to the right people. All of these factors must be acceptable to a consumer before they purchase a product or adopt a new health practice. As consumers are bombarded with marketing messages every day, most of the information they receive is likely to be screened out or forgotten; therefore, new products need to deliver added consumer value. Numerous studies on new product performance have shown that understanding the needs of the target consumer first creates a huge strategic advantage and improves the chances of successful product uptake – which, in turn, improves health and nutrition outcomes. At the Children’s Investment Fund Foundation (CIFF), we take this consumer-centric approach when investing in products and services across our child health and adolescent sexual and reproductive health portfolios. An important first step is investing in consumer insights to inform marketing strategies.

Case study: Multiple micronutrient supplements in Bangladesh

At CIFF, one of our key strategic priority areas is ensuring babies are born at a healthy weight. Part of this involves making sure that mothers have optimal nutrition and can access and choose the products they want for themselves and their babies. The World Health Organization currently recommends that pregnant women should take iron and folic acid supplements, which is the current standard of care. However, we now have compelling evidence that taking a different product – multiple micronutrient supplements (MMS), which are a combination of 15 vitamins and minerals – instead of iron and folic acid can significantly reduce the number of babies born at low birth weight, reduce the risk of maternal anemia and improve child survival rates.

In response, CIFF, working together with our partners, has developed an investment to set up a sustainable business model for MMS for pregnant women through pharmacy networks in Bangladesh. Using the ‘4Ps’ approach as a framework, the aim of this investment is to make MMS affordable, available and desirable to every pregnant woman in the country by 2024. A key component of this investment is to conduct intensive consumer research to understand what barriers might exist to MMS uptake in order to design effective marketing strategies and ensure pregnant women are motivated to buy and consume the product.

“A key component of this investment is to conduct intensive consumer research to understand what barriers might exist to MMS uptake”

We plan to structure demand creation activities into two key areas based on an initial scoping assessment:

1) B2C demand creation for consumers and their key influencers

Evaluation data from a micronutrient powder (MNP) program for young children in Bangladesh revealed that strategies used to generate demand were best described as ‘push strategies’ (i.e., knowledge dissemination and awareness-raising activities) but that no ‘pull strategies’ (e.g., creating an enabling environment and motivating consumers through tailored offers and services) were being used to effectively create demand.

The evaluation of the MNP program showed that while product awareness had increased among caregivers, a major barrier to uptake was the perceived ‘lack of need’ for the product from a customer perspective, which indicates a marketing problem. The unique contribution of social marketing to the field of be-

FIGURE 1: Launching a product – comparing our approaches for multiple micronutrient supplements (MMS) and micronutrient powders (MNP) in Bangladesh



FIGURE 2: Focus group discussions and kitchen observations in Bangladesh



Pregnant and lactating women and young mothers in rural Bangladesh

1



Micronutrient powders added to home-cooked complementary foods

2

havior change is its potential to address behavioral challenges that share the characteristics of a marketing problem – where the desired behavior is somewhat complex or new, people need new skills, the behavior is not widely accepted, significant barriers to adoption exist and the perceived short-term benefits are few.⁸ The insights from the MNP program evaluation highlight the huge importance of using consumer-centered design to create communication content and services that motivate people to change behaviors and also increase the value of a product in their perception. In addition, as MMS are a new product on the market, they have few immediately visible benefits. MMS are also a preventative supplement, rather than a disease treatment like oral rehydration salts. The benefits are therefore manifested over time and not noticed immediately. Initial insights therefore suggest that our approach should aim to create a social norm and generate a ‘buzz’ around the product.

2) B2B demand creation for MMS with healthcare providers

Healthcare providers are a key trusted resource for health advice among pregnant women, and women tend to trust their recommendations. The scoping assessment with Bangladeshi health professionals and paramedics found that there is a lack of perceived standards for supplementation and a tendency to recommend prenatal supplementation, including iron and folic acid, primarily as a form of treatment for pregnancy-related symptoms on a needs basis rather than as a routine prophylactic. As pregnant women are very likely to come into contact with a healthcare provider throughout their pregnancy, the healthcare provider’s influence can have a positive or negative impact on a woman’s decision to purchase MMS, and whether she continues to take them and complies with recommendations. Identifying and addressing key barriers and motivators for healthcare providers to change their ‘business as usual’ mindset is therefore instrumental for the successful uptake of MMS. When launching a new preventative care product or a treatment product, the commercial sector always makes sure that the right health professionals are on board, and for a good reason, as they are key gatekeepers to increasing demand for the product (see **Figures 1 and 2**).

Case study: Egg powder in Ethiopia

Working together with our partners, CIFF is conducting a consumer insights study on egg powder in Ethiopia. Eggs are loaded with high-quality proteins, vitamins and minerals, and have great potential for improving maternal and child nutrition in low- and middle-income countries. Egg powder, which is composed of dehydrated eggs, can be much cheaper than fresh eggs for the consumer because of economies of scale; hence, it has become an affordable commodity and is widely used for its functional properties in the food industry. Additionally, egg powder is much easier to transport, store and handle, has a long shelf

life of 2 years, and is very versatile and easy to use. For example, it can be added to complementary foods, such as a porridge, simply by mixing in the dry powder. Although egg powder seems promising, whole egg powder has not been tested for use, which means intensive investment in consumer insights and social marketing will be required.

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“The agricultural industry in Ethiopia is in a period of transformation, and eggs or egg powder may offer a low-cost, high-return solution as a source of quality protein to solve problems of food security and undernutrition among women and children. As egg consumption is currently low in Ethiopia, it is essential that we understand the needs of our consumers first to successfully shift purchasing and consumption decisions.”

Prof. Fekadu Beyene, Commissioner, Environment, Forest, and Climate Change Commission of Ethiopia (former State Minister of the Ministry of Agriculture and Livestock Resources)

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We are working with partners in Ethiopia to understand the consumer insights. The insights generated will be used to inform the marketing strategy of a line of novel food products, containing egg powder as a main ingredient, designed for consumers who are at the base of the pyramid, with a specific focus on women and children under 5 years of age.

The consumer insights study will progress through five stages:

Stage 1: Determine ‘what’ our target market eats

Gain insights into the base of the pyramid target market of pregnant and lactating women and caregivers of children under 5 years to examine current eating and child feeding trends, including trends in food purchasing, food choice, food packaging and food preparation.

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Stage 2: Evaluate ‘why’ our target market eats those foods

Understand the emotional and psychological drivers for the

feeding choices of caregivers of children under 5, and also the eating choices of pregnant and lactating women, including what motivates them, their aspirations and how the target audience can best be reached.

Stage 3: Develop product concepts

Develop and test product concepts containing egg powder, such as the culturally popular ‘shuru’ bean powder, instant complementary food porridge containing egg powder, egg powder as an ingredient and other innovative, nutritious food product solutions.

Stage 4: Conduct consumer immersion

Conduct consumer immersion with the products, to understand product usability and provide recommendations on how to improve the consumer’s experience of the product.

Final stage: Generate recommendations

Make recommendations on product packaging, price points and promotion strategies, by means of quantitative assessment for the most favored sample products. This stage will identify the geographical areas in Ethiopia that, from the perspective of consumer receptiveness, demonstrate the greatest opportunity for launching an egg powder product.

“Introducing climate-friendly and nutritious products into the marketplace will play a key role in reinvigorating food systems”

In conclusion

Introducing climate-friendly and nutritious products into the marketplace will play an essential role in reinvigorating food systems. A key learning for us, particularly following the MNP investment in Bangladesh, is that efforts to influence customers’ product choices by using a traditional educational and informational approach and imparting nutrition knowledge and education will address only a limited number of factors that drive consumer choices. Social marketing principles and consumer insights provide a more-nuanced understanding of the drivers and barriers that influence the design of effective marketing strategies.

Acknowledgement

We would like to acknowledge our partners GAIN, BRAC and ICD-DR,B for their work in Bangladesh, and the government of Ethiopia for their work in food systems. This article builds on research findings and diagnosis conducted in Bangladesh and Ethiopia by our partner *Sight and Life*. The research consisted of stakeholder and consumer interviews as well as mystery shopping, observation and market assessment elements.

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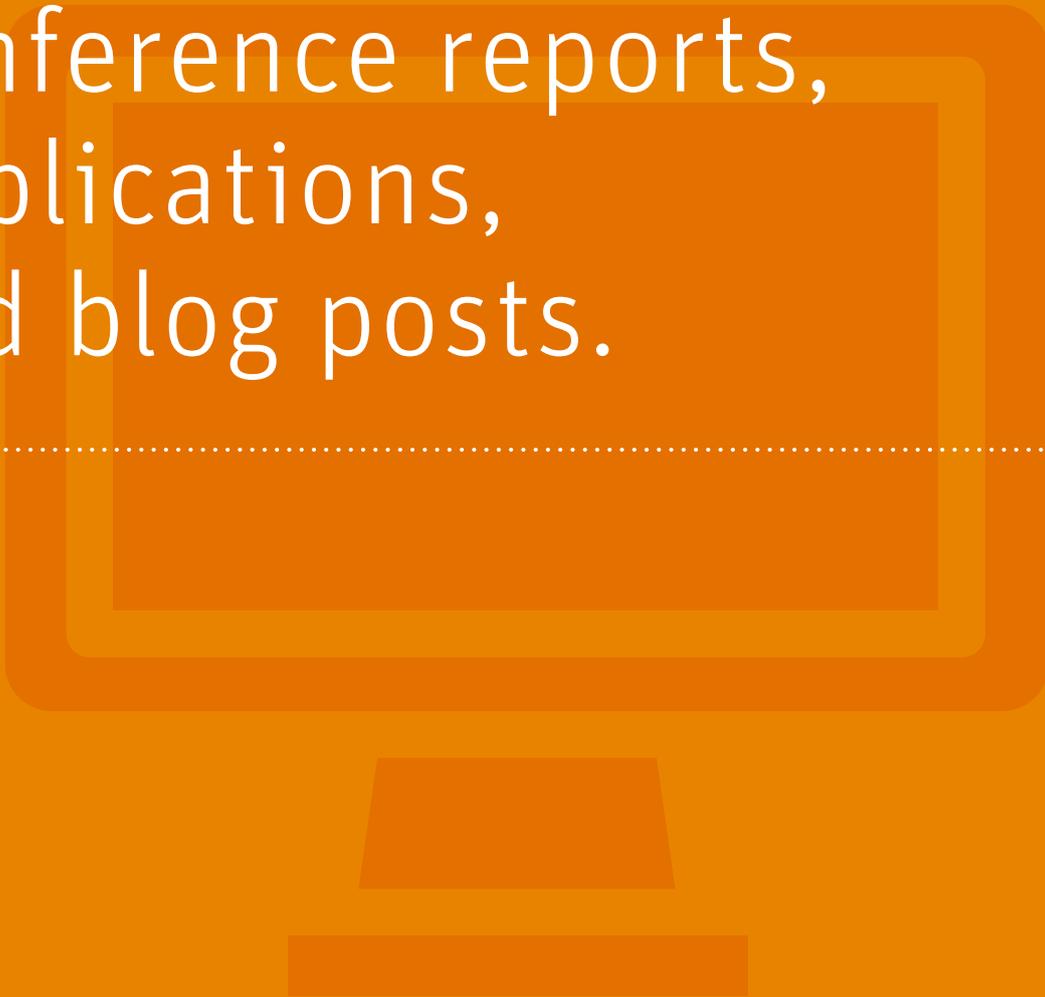
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A stylized, minimalist illustration of a computer monitor. The monitor is represented by a large, rounded rectangle with a thick border, and a smaller, solid rectangle inside it, suggesting a screen. Below the screen is a trapezoidal shape representing the base of the monitor. The entire graphic is rendered in a solid orange color, matching the background.