

Developing a detailed understanding of the market segments, customer profiles, and various go-to-market considerations to effectively design RT systems and business models that will succeed in the marketplace is essential for technology and commercial partners of the Bill and Melinda Gates Foundation. To facilitate this understanding, the Sanitation Technology Platform (STeP) partnered with FSG to conduct a study on Market Insights for the Reinvented Toilet (RT) in India. This body of work was designed to identify customer segments, value propositions, and technology insights for deploying the new technology categories of single- and multi-unit Reinvented Toilets into urban residential settings in India. The six-month study provided a robust and unique package of resources and insight to guide both technical and business decisions for a product category that is still emerging. For technical partners, the research defines performance characteristics and features that will drive acceptance and adoption within a particular customer segment, which can be used to direct research funding and technology development efforts to the most essential performance attributes.

For commercial partners, the research defines the benefits an RT must deliver to be adopted by a specific customer segment and provides high-level go-to-market strategies for those customer segments. Below is a sample of the information provided in the report, specifically highlighting the findings for the Multi-Unit RT (MURT). Similar data is also available for the Single-Unit RT (SURT).

Age of construction		New construction		Existing construction	
Usage type		Residential	Commercial/ Institutional	Residential	Commercial/ Institutional
Primary price/ULB land categorization	Average hours of electricity supply				
Premium & Luxury		1		N/A	
Mid-segment	Low electricity (≤80% hours)	2	5	6	8
	High electricity (>80% hours)	3			
Affordable		4		7	

### STUDY REACH

- 4 Cities
- 30+ urban localities
- 245 customer interviews
- 109 institutional customers
- 59 value chain actors
- 230+ person-days of field research



For the Multi-unit Reinvented Toilet (MURT), eight customer segments were identified and characterized. Samples of the information that is available for each segment are shown here:

### Segment 2

- Builder and architect are decision-makers
- Actively looking to install a septage management/ treatment solution as it is mandatory by law and considered a pre-requisite by customers
- Highly reputation conscious as word-of-mouth draws customers – values safety and reliability in amenities
- High value for a solution that would enable reduction in electricity-related expenditure

