

# Market-based intervention feasibility assessment for hygiene items

In support of the Cox's Bazar WASH Sector's  
Hygiene Promotion Technical Working Group

April 2019 | Cox's Bazar, Bangladesh



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# Background

- Since August 2017, more than 700,000 refugees have arrived in Bangladesh's Cox's Bazar District from Myanmar. The unplanned and spontaneous nature of the Rohingya refugee camps combined with high population densities and challenging environmental conditions have produced a crisis with especially acute water, sanitation, and hygiene (WASH) needs.
- Currently, the Cox's Bazar WASH Sector and its partners work to meet refugees' hygiene needs through regular in-kind distribution of hygiene items.
- The Sector has been considering switching modalities from in-kind distributions to voucher-based programming to **provide beneficiaries greater flexibility in their capacity to procure items as needed, based on household-specific needs.**
- However, it is uncertain what modality refugees would prefer, and if the current market system is stable or strong enough to provide the supply of hygiene items needed by the refugee population.



# Assessment objectives

1. **Identify** potential challenges that may affect refugee households or market vendors in switching from in-kind distribution to market-based distribution modalities
2. **Understand** the preferences of Rohingya refugees for different modalities of hygiene item delivery, and identify how these preferences differ based on households' distance to markets
3. **Assess** the hygiene item needs of Rohingya refugees, and identify how these needs differ based on households' distance to markets
4. **Evaluate** the capacity of markets to respond to an increased demand for hygiene items





# Methodology



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# Assessment components

## 1. Market scoping

- Consultation with WASH partners, Site Management agencies, and IOM-Needs and Population Monitoring (NPM) to identify market areas in and around camps accessible to Rohingya refugees
- Based on this consultation, complete scoping visits to each market, including collection of GPS points and assessing the number of vendors


## 2. Household survey – to understand:

- Preferred hygiene items
- Preferred distribution modality
- Factors facilitating/hindering access to markets

## 3. Vendor survey – to understand:

- Ability to increase supply as needed
- Business conditions
- Challenges in conducting business





# Methodology

## Household survey

- The study used a random sample stratified by camp area, and distance to markets:
  1. Kutupalong-Balukhali Extension: 30 minutes or less from major markets
  2. Kutupalong-Balukhali Extension: more than 30 minutes from major markets
  3. Southern Teknaf: 30 minutes or less from major markets.
- Distance to markets was calculated by checking walking distance to the location of main markets identified in the scoping exercise, using [Network Analyst](#) in ArcGIS.
- Within each stratum, a random distribution of points from a sample frame of [shelter footprints](#) was drawn to provide a sample representative at 95% confidence level and 10% margin of error.
- When overall findings are cited in this presentation, aggregate findings both Kutupalong strata are used due to gaps in the sampling in Teknaf (see limitations).
- 706 households were surveyed (covering 343 female and, 363 male respondents).
- Support for questionnaire translation and enumerator language training was provided by Translators Without Borders.





# Limitations

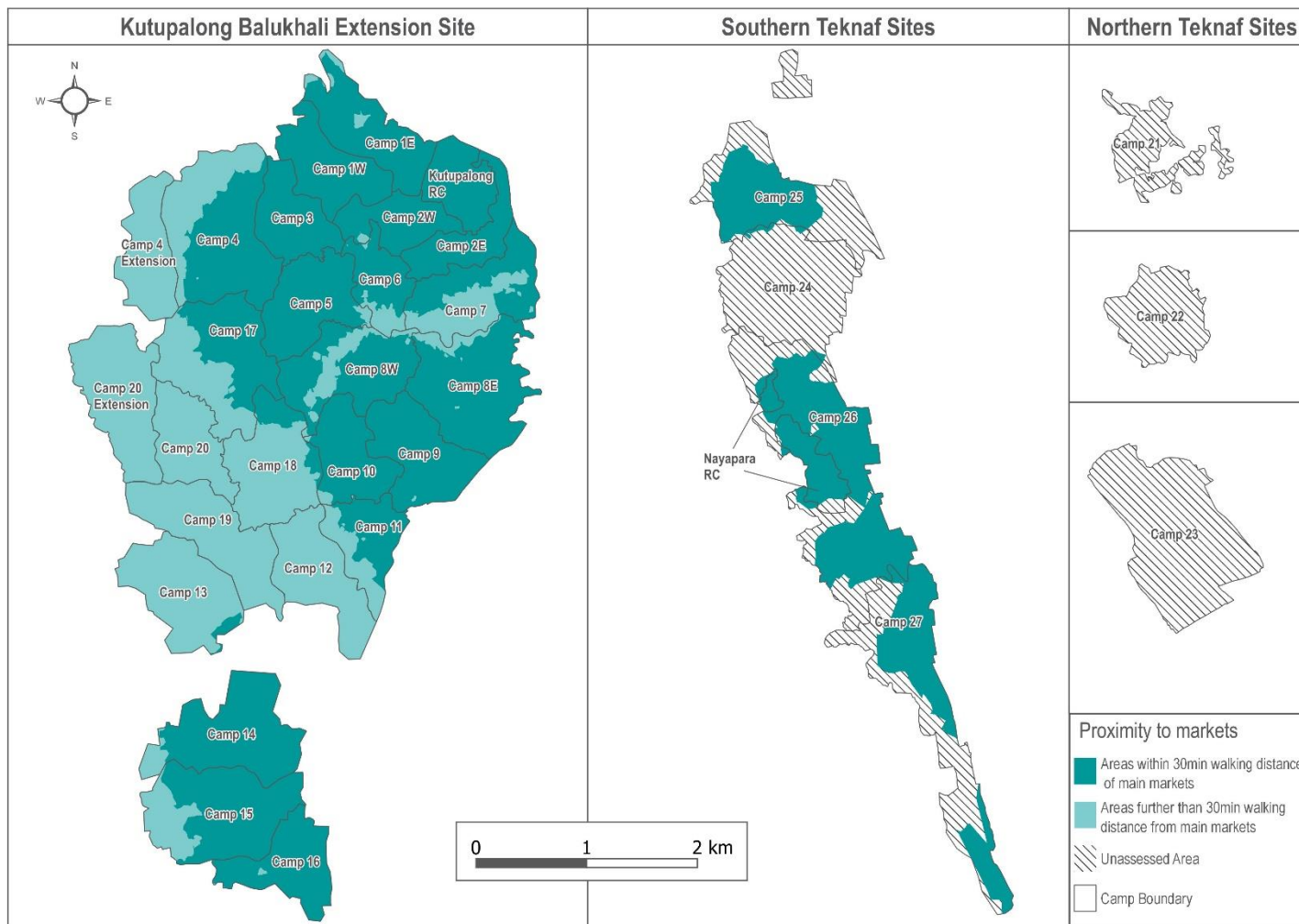
## Household survey

- The findings cannot be extrapolated to sites that were not visited.
  - Areas in Teknaf (camps 23-27) that were more than 30 minutes walk to markets were mistakenly excluded from the sample during sample design phase.
  - Camps 21-22 were not included in either sample due to time and resource constraints.
- Due to team concerns around data quality related to respondent comprehension of questions and feedback from enumerator teams on possible response bias, a number of variables have been removed from the assessment findings.





# Map of areas covered by household survey



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# Methodology

## Vendor survey

- This survey was conducted with vendors in key markets in Rohingya refugee camps in Cox's Bazar district.
- Following an initial scoping mission to identify main markets of 15 or more vendors, four key market areas were chosen for in-depth follow-up assessment based on size/distribution of markets and time/resources available for the assessment:
  - Camp 1E/1W market;
  - Camp 8E/9 market;
  - Camp 14 market;
  - Camp 26/Nayapara Registered Camp (RC) market.
- Within each market area, enumerators conducted a snowball sample vendors selling hygiene items, completing a total of 138 vendor interviews.





# Limitations

## Vendor survey

- Due to limited time and resources available for the assessment, and the lack of an available sample frame for hygiene item vendors, non-probability sampling was used.
- As such, data are NOT representative to a known level of statistical confidence or margin of error. Rather, they should be considered INDICATIVE of main trends among vendors.



# Key findings: Household survey

Data collection: 31 March - 8 April 2019

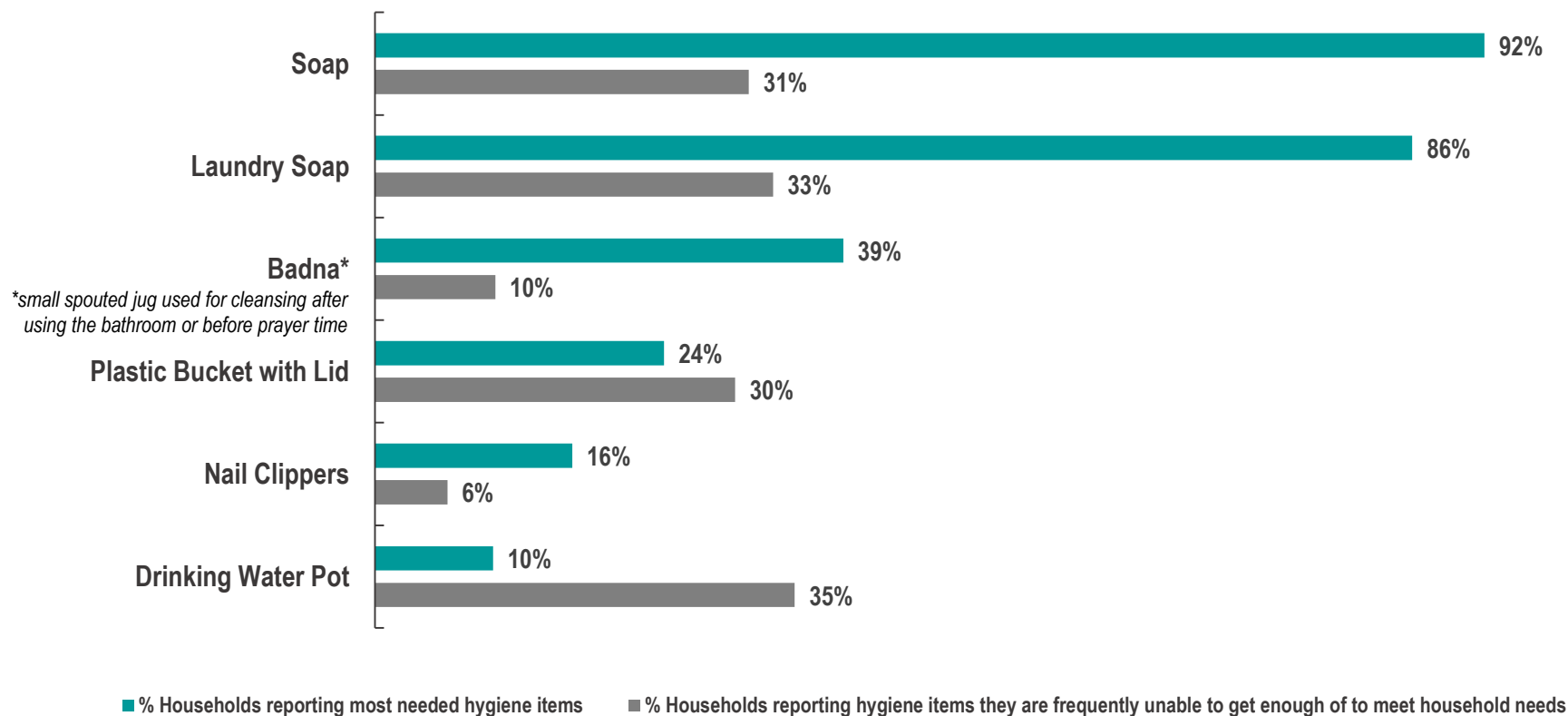


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# Hygiene item needs and availability

Most commonly reported hygiene item needs, compared with most commonly reported hygiene items that households struggle to access (for both indicators, respondents could select up to three options)



No significant differences between areas or gender of respondent were recorded



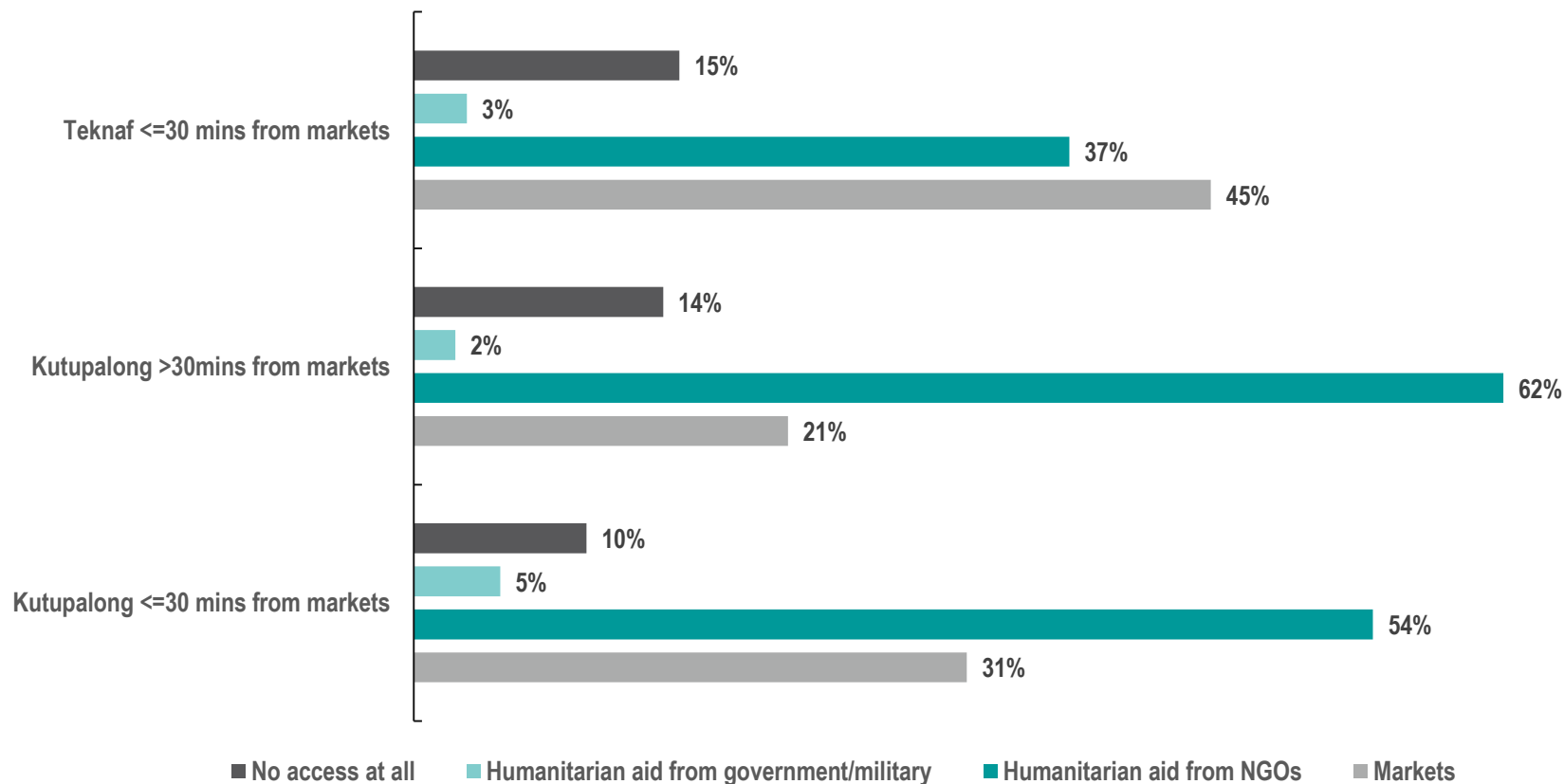
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# Primary means of accessing hygiene items

% of households by reported primary means of access to hygiene items



No significant differences between areas or gender of respondent were recorded

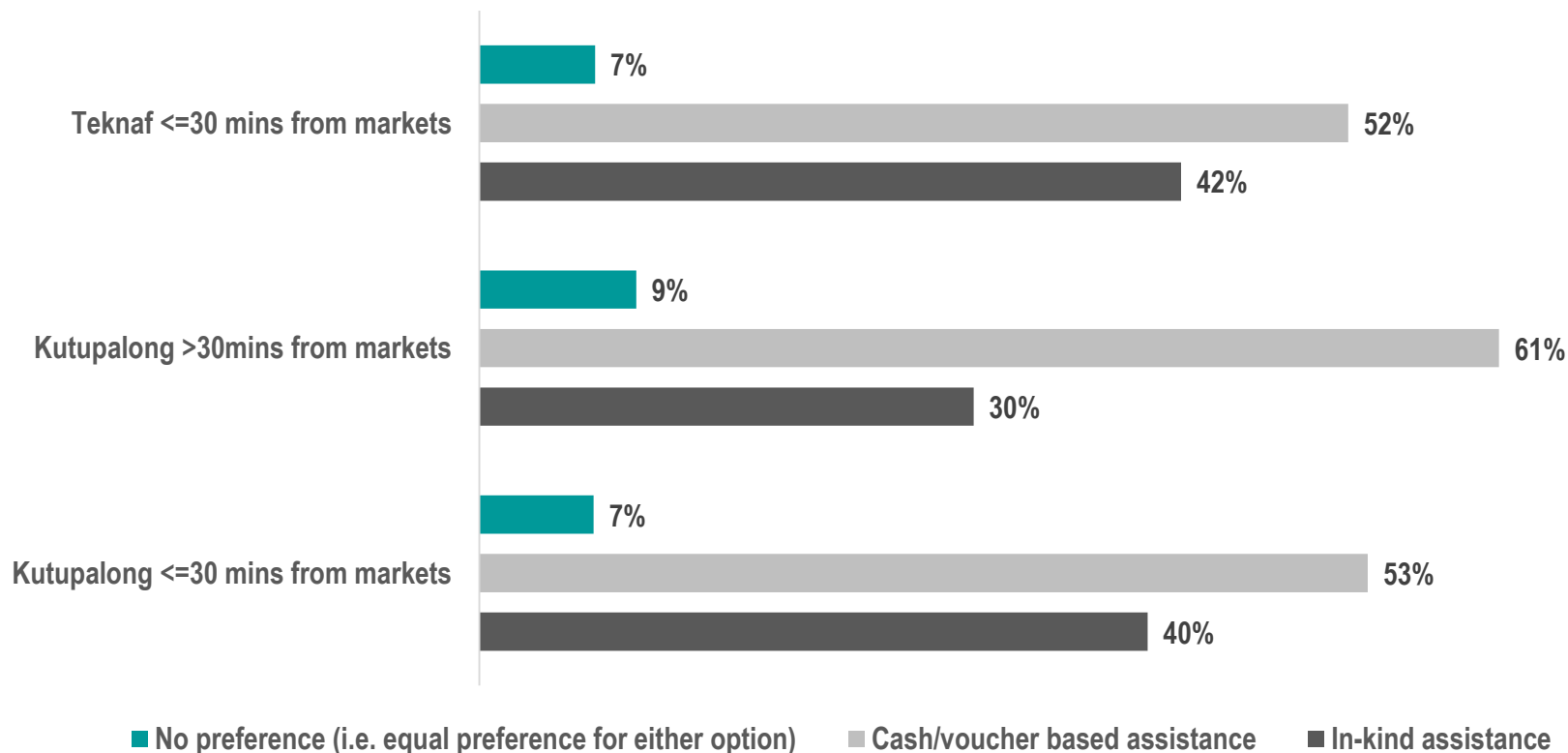


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# Preferred modalities

% of households by preferred modality of hygiene assistance



Overall, **60%** of male respondents reported preferring cash/voucher-based assistance compared with **50%** of females. No other significant differences between female and male respondents were recorded.



# In-kind assistance

Of households who report preferring in-kind assistance (n=265), % giving different reasons, by gender of respondent (respondents could select multiple options)

Female		Male
41%	Poor quality of items at markets	51%
71%	Currency is unstable	50%
36%	Prices at markets are unstable	44%
26%	Concern about vendors charging high prices	32%
24%	Prefer not to visit market	7%
15%	Household members may use cash for personal interests	20%
21%	Unable to access market	14%

No significant differences between areas were recorded



# Cash/voucher-based assistance

Of households who report preferring cash/voucher-based assistance (n=388), % giving different reasons (respondents could select multiple options)

More freedom to purchase preferred brands or items	84%
More freedom to allocate expenditure across hygiene and non-hygiene items as needed	55%
Ability to save money for times of greater need	36%
Difficult to carry in-kind aid	12%
Want to support local farmers and vendors	12%
Greater dignity	11%

No significant differences between areas or gender of respondent were recorded





# Access to markets, by gender of respondent

## Female

## Male

<b>86%</b>	% of respondents reporting visiting markets at least once a week	<b>100%</b>
<b>2.9</b>	Average number of days respondents visit markets per week	<b>3.3</b>
<b>31%</b>	% of respondents reporting being able to purchase hygiene items on credit from vendors	<b>34%</b>
<b>22%</b>	% of respondents reporting security risks en route to markets constraining market access	<b>7%</b>
<b>24%</b>	% respondents reporting security risks at markets constraining market access	<b>9%</b>
<b>45%</b>	% respondents reporting non-security barriers to accessing markets	<b>17%</b>

No significant differences between areas were recorded

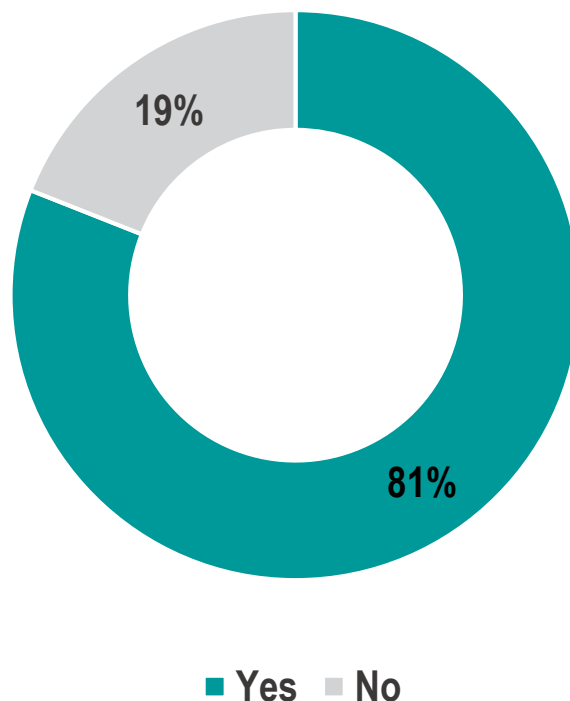


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# Women's participation in decision-making

% of households reporting that women are involved in decisions on how the household's money is spent



No significant differences between areas or gender of respondent were recorded



# Key findings: Vendor survey

Data collection: 25 March - 2 April 2019



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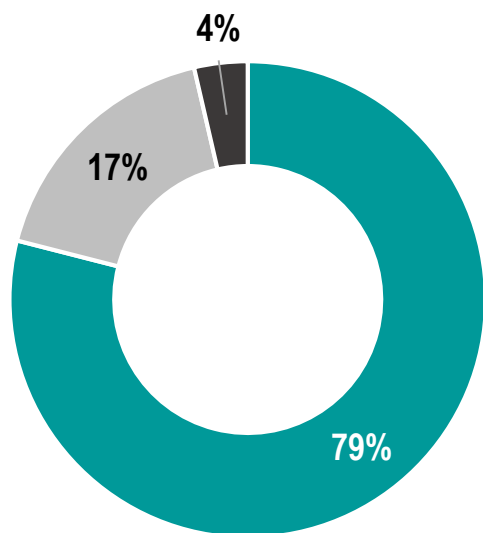
# Information – assessed vendors

100%	of vendors were male
31.9	was the average age of vendors
86%	of vendors owned the shop they were working in
38%	of vendors were vendors prior to displacement in August 2017
6.8	was the average number of days per week that vendors reported being open
67%	of vendors reported being able to purchase items on credit from suppliers
83%	of vendors reported allowing customers to purchase items on credit
8.5 m <sup>2</sup>	was the average reported storage area in vendor shops



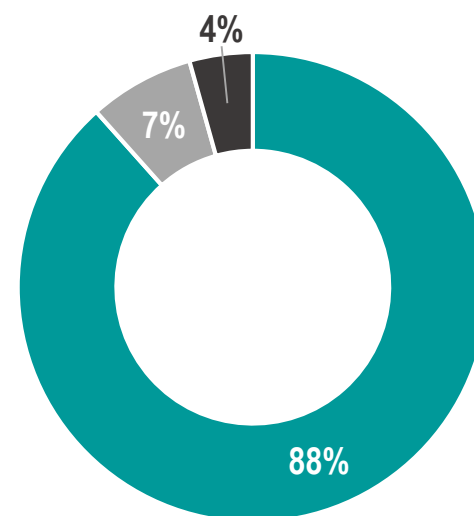
# Shops and storage

% of assessed shops by construction type



- Makeshift stall or counter with roof (this roof can also be makeshift or just plastic sheeting)
- Shop inside a solid covered building
- Open-air (on a tarpaulin / table / ground without a roof)

% of assessed vendors reporting different storage practices



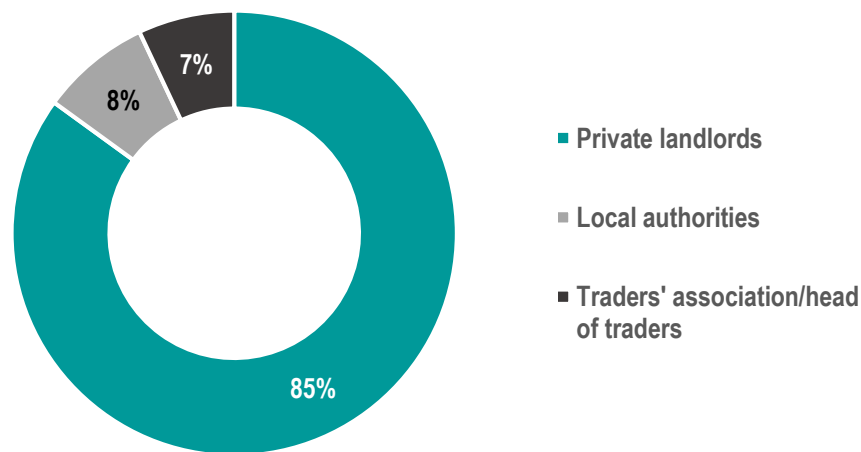
- In my shop
- In my room
- In a separate building used only for storage (e.g. a warehouse)



# Rental of shops

**64%** of assessed vendors reported paying rent for their shop/space in the market

of vendors paying rent (n=88), % by type of landlord



**1,500 BDT\***

was the median reported rent per month for a shop/space

*\*Bangladeshi Taka. There are approximately 84 BDT to one USD*

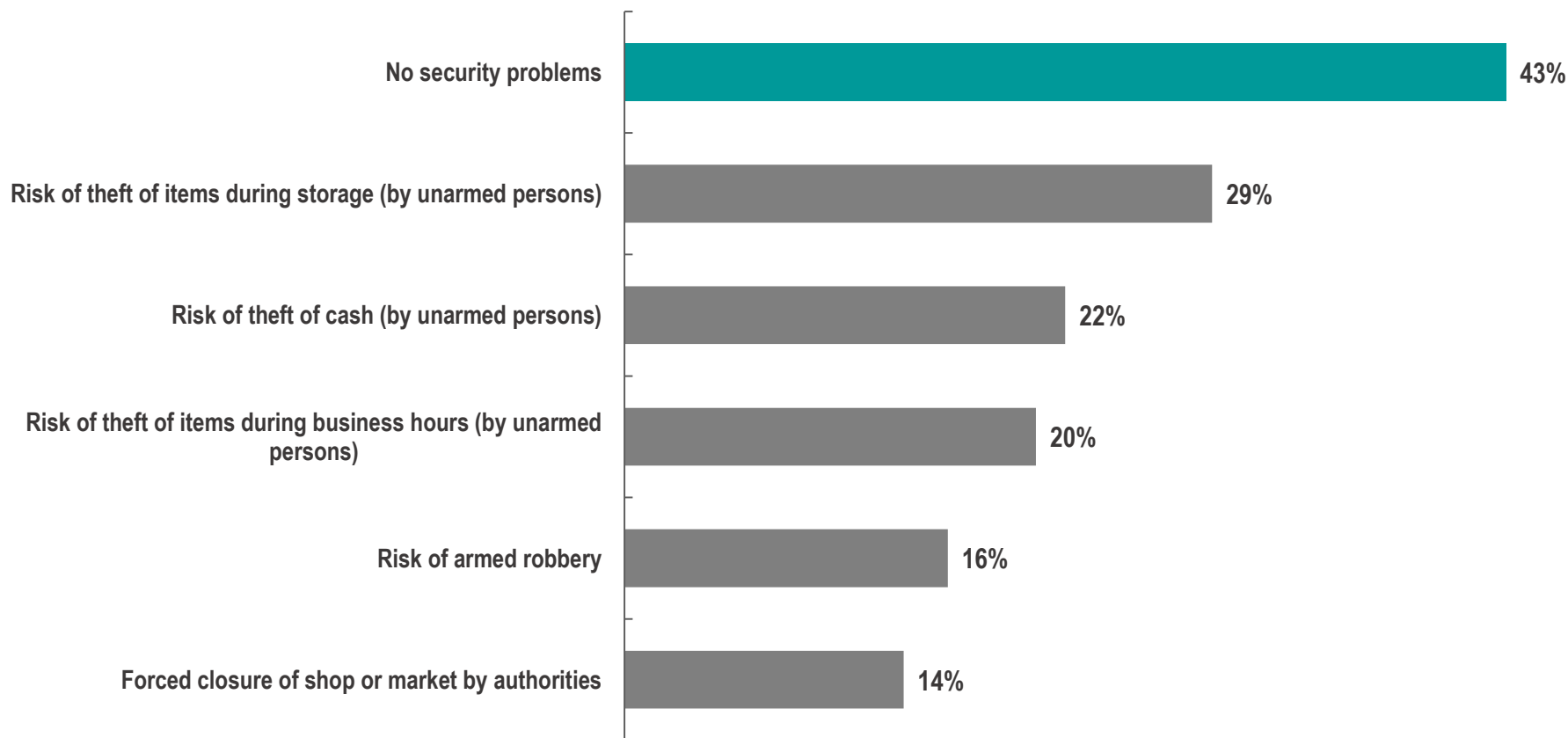


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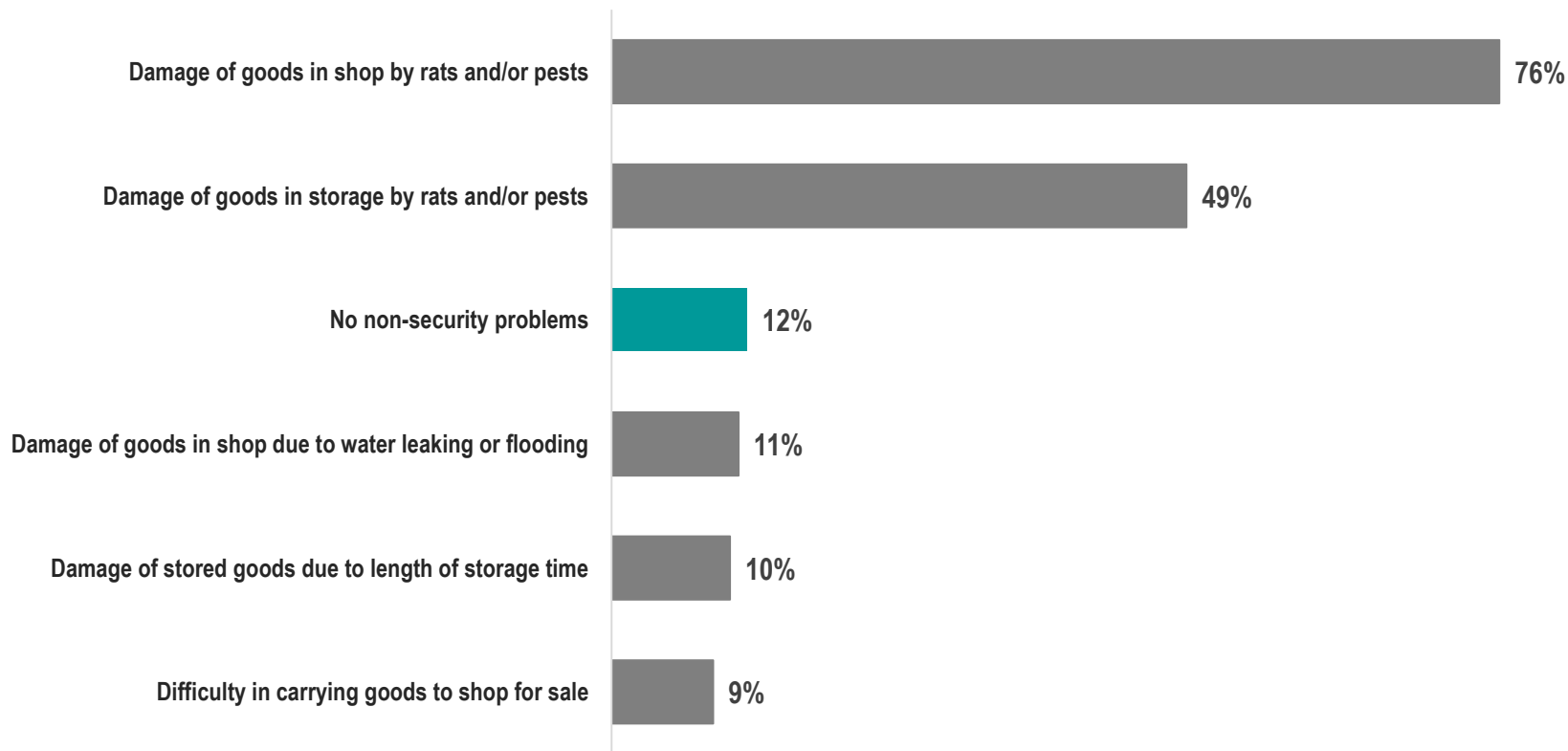
# Security challenges

% of assessed vendors reporting security challenges to conducting business  
(respondents could select more than one option)



# Non-security challenges

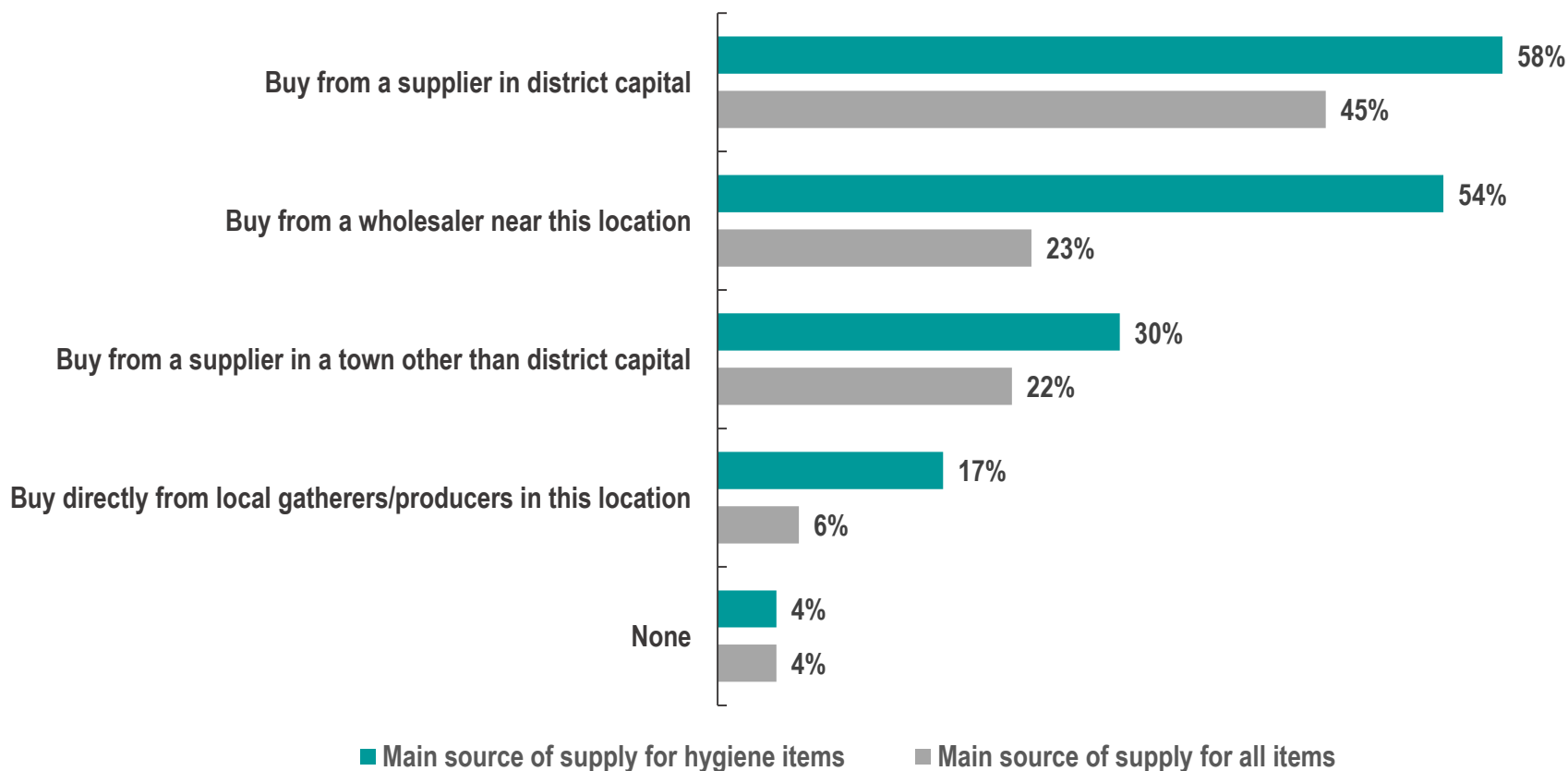
% of assessed vendors reporting non-security challenges to conducting business (respondents could select more than one option)





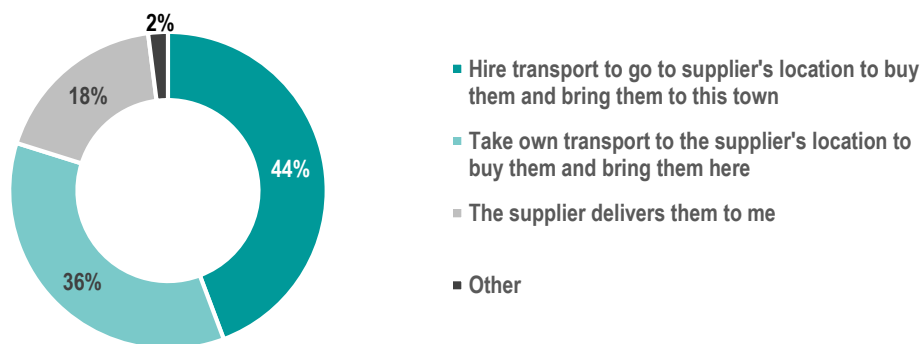
# Supply of hygiene items

% of assessed vendors reporting different sources for hygiene item supply



# Transportation of hygiene items

% of assessed vendors reporting different methods of transporting hygiene items from suppliers



% of assessed vendors reporting challenges transporting hygiene items to the market

No challenges	41%
Heavy traffic / accidents on the road	29%
Extortion / bribery during transportation of goods	25%
Cars/trucks face difficulties in travelling to the town due to poor quality of roads	12%
Closure of roads by authorities	6%
Arbitrary detention	4%



# Shortages of hygiene items

**26%** of assessed vendors reported shortages of hygiene items to meet customers' demand in the month prior to data collection

Of vendors reporting shortages (n=36), % reporting different reasons (respondents could select multiple options)

Suppliers did not have enough of the items	33%
Demand for these items suddenly increased	28%
No reason specified	25%
Could not afford to restock	17%
Other	6%
Roads were closed/unusable	3%



# Re-stocking hygiene items / increasing supply

**1.25**

average number of times per week that assessed vendors report re-stocking items

**29%**

of assessed vendors reported re-stocking items less than once per week

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**43%**

of assessed vendors reported they would be able to double supply in response to doubled demand

**2.5**

is the average number of days estimated to double supply (of vendors reporting they would be able to double supply)





# Increased demand for hygiene items

Of assessed vendors reporting they would be able to double supply (n=60), % of reporting steps to double supply (respondents could select multiple options)

Buy goods on credit to initially increase supply and then pay back the credit with profits from increased sales	43%
Restock from my supplier more often	38%
Buy a higher amount from my supplier each time I restock	33%
Buy additional quantities from other suppliers	12%

**19%** of assessed vendors reported they would not face barriers to double supply of hygiene items

**62%** of assessed vendors reported they would not have the money or access to credit to scale up initially in order to double supply of hygiene items



# Issues to consider

- If a market-based intervention is to take place, the following issues should be considered:
  - Differences in the realities of males and females in relation to accessing markets (i.e. females are more likely to stay at home and are less likely to visit markets)
  - Regardless of distance to markets, households would prefer to receive vouchers compared to in-kind distributions due to increased autonomy/freedom
  - There may be a need to identify and address localised security/protection risks faced by households and vendors
  - Appropriate spaces for vendors/markets should be established to address issues related to pests, to minimise public health risks and damage to for-sale items



# Issues to consider (cont.)

- If a market-based intervention is to take place, the following issues should be considered:
  - Ensure suppliers have the capacity to provide sufficient hygiene items to vendors
  - Ensure vendors have sufficient capacity to upscale stocks to meet increased demand (i.e. through understanding feasibility of up-front payments to reduce financial limitations on vendors)
  - Further research may be required to understand risks related to supplier-vendor relations—particularly around management of credit/debt initiatives





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