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SANITATION, BEHAVIOR CHANGE, AND WATER FOR SENEGAL

USAID/ACCES

A SANITATION MARKETING JOURNEY



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BACKGROUND

Senegal is a country located in West Africa with an estimated population of 17,738,795 in 2021, a quarter of whom live in the capital region (Dakar). With an average age of 19yrs, this population is characterized by its youth. GDP per capita was estimated in 2020 at US\$1,471.8.

Regarding household sanitation coverage in rural areas and the use of latrines:

In 2015, 42.5% of Senegalese households had improved latrines, 51.3% in urban areas and 33% in rural areas; 22.6% shared toilets, 20% had unimproved toilets while 14.4% had no sanitation facilities at all, suggesting they practice open defecation (OD).

During this same period, the supply of latrines was characterized by self-construction of unimproved latrines most of the time, with great involvement of heads of household and by the construction of improved latrines via subsidized projects. Hygiene and sanitation are among the priorities of the Senegalese government. After a decade of approaching rural sanitation by subsidizing latrine construction with minimal results, the Government of Senegal launched a new strategy for rural sanitation defined by a transfer of responsibility for the acquisition of sanitation services to communities. This created an opportunity for market-based approaches to increase sanitation outcomes.

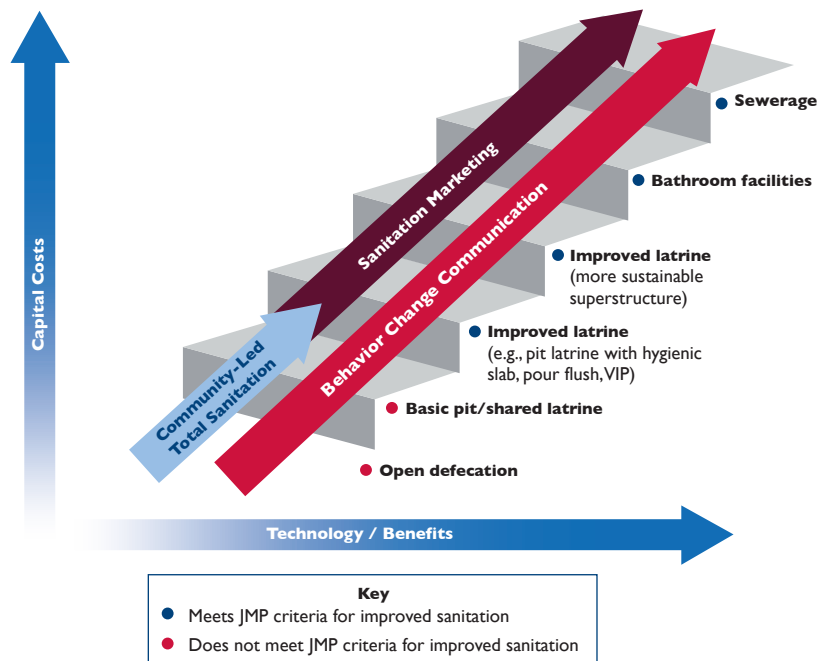
In line with this strategy, the USAID Project “Assainissement, Changement de Comportement et Eau pour le Sénégal (ACCES)”, or “Sanitation, Behavior Change, and Water for Senegal,” aims to increase sustainable access to improved water and sanitation services and inspire adoption of hygiene practices to improve health and nutritional outcomes, especially for women and children.

To develop a sustainable, holistic solution for sanitation, ACCES’ strategy focused on the power of markets to deliver sanitation products and services. ACCES combines two approaches: Community-Led Total Sanitation (CLTS) coupled with Market-Based Sanitation. The first approach is used in remote rural communities of no more than 200 households. It aims to generate demand for improved sanitation and decrease open defecation while complying with existing standards and practices. The market approach generates demand for sanitation-related products and services and stimulates supply by mobilizing and building capacity in the private sector to provide a range of appropriate and affordable WASH products and services. When combined, the two approaches offer greater beneficial impact and sustainability.

The ACCES market-based approach has been recognized as an effective way to address the difficulties in accessing improved sanitation because it aims to increase the demand for sanitation, while ensuring a sustainable and affordable supply of products and services that are appropriately designed to meet demand, as well as to accommodate different site conditions and household budgets across client segments.

WHAT IS SANITATION MARKETING?

FIGURE 1: CONCEPTUAL MODEL FOR CHANGING SANITATION BEHAVIORS AND MOVING UP THE SANITATION LADDER



Source: WSP *Scaling Up Rural Sanitation: Introductory Guide to Sanitation Marketing*, Jacqueline Devine and Craig Kullmann, September 2011

There is no broad consensus on sanitation marketing, it is sometimes defined as strengthening supply by building capacity of the local private sector or discussed in terms of “selling sanitation” by using commercial marketing techniques to motivate households to invest in building improved toilets. To better understand sanitation marketing, it is useful to first understand social marketing.

Social marketing is a process for creating, communicating, and delivering benefits that profits society.

Over the past four decades, the field of social marketing has made significant strides and is now widely acknowledged and applied. In any social marketing intervention, a specific behavior is targeted for modification or adoption for the benefit of society as a whole. To improve rural sanitation, individuals, and the overall community, must stop the practice of open defecation, acquire and use a hygienic sanitation facility, properly maintain sanitation facilities, and properly dispose of children’s excreta.

Through a sanitation marketing approach, USAID/ACCES seeks to catalyze the market to better serve rural households to achieve their sanitation and hygiene improvement objectives. These strategies can greatly increase access for poorer household, despite persistent affordability barriers for some.

To achieve its objectives, USAID/ACCES relied on a sanitation marketing approach to generate demand and develop the supply of affordable and attractive products. Keep in mind that sanitation marketing is about more than just training masons. It involves a more comprehensive demand and supply strengthening strategy drawing on social and commercial marketing and behavior change communication approaches. ACCES’ approach followed several steps including:

- i. market assessment and planning to determine market readiness, identify partnerships, and plan the roll-out;
- ii. product design focused on consumer preferences to lower costs and make improved sanitation more affordable;
- iii. design and test promotional and marketing materials/channels
- iv. market research to map key players in the supply chain and evaluate potential sales volume;
- v. market test to design and test the supply-chain and business models for product delivery to increase local accessibility and make it easier to purchase and install improved sanitation
- vi. expand marketing and product delivery to other geographic areas
- vii. monitor sales, installation quality, and client satisfaction

Market Assessment

While 43% of the population had access to improved sanitation, coverage was much lower in the six regions targeted by USAID/ACCES. For example, the 2010-2011 DHS indicates that access to improved sanitation ranges from a low of 4% for Kedougou to a high of 22% for Matam. Several challenges also threaten to erode achievements and stagnate growth. These include:

- 80% of water and sanitation financing comes from external resources, as reported in the 8th annual joint sector review. However, experience shows limited absorptive capacity to use effectively use funds for rural sanitation.
- A long history of highly subsidized, project-funded programs distorts potential WASH markets and dissuades consumers from purchase
- The urban sanitation subsidy program, as reported by WSP, encountered difficulties including decreased household contributions, low uptake, poor targeting, and poor access to credit, which have increased costs and limited scalability.

These broad market indicators need to be better understood and nuanced to design a sustainable market approach. Through studies and market development workshops, ACCES identified market failures and their root causes, and then determined the most appropriate interventions to improve demand and supply and create an enabling environment for a healthy sanitation market.

The approach is broken into four questions and associated tasks: Step 1 (Who is the market failing?) and 2 (How is the market failing?) were completed through primary and secondary research and analysis, while step 3 (What should we do in the market?) and 4 (How will we succeed?) were addressed with diverse stakeholders through market development workshops.

Significant secondary market research was consulted, including a household survey carried out by the

Swiss Center for International Health in 2015, the Rural Sanitation Value Chain: Market Landscape Business Model, and a Communication Strategies in Water, Hygiene and Sanitation literature review. In addition, the ACCES project completed a sanitation and water access and services desk review and conducted additional field inquiry with various stakeholders including private sector actors (importers, manufacturers, retailers, service providers), WASH entrepreneurs (artisans, masons), local and regional government agencies, financial sector players (MFIs, Tontines), and households. Specifically, the ACCES-led market research sought to identify:

- The main constraints that kept households from purchasing a toilet.
- Key market actors in the sanitation value chain, and their capacity and incentives to participate in the market for WASH products and services.

ACCES synthesized the market information gathered from the research into a market matrix, shown below. The market matrix is a tool used to visualize the entire market system and to capture the various interactions and functions that occur within a market. It also organizes key insights such that a viewer can quickly discern where the market system is working or failing. The information is then grouped, according to market barriers and enablers to facilitate problem solving and decision making.

| MARKET FUNCTIONS | | Rural Sanitation Products | | | |
|---------------------|---------------------------------|--|---|--|--|
| | | Importers and Manufacturers | Wholesalers and Retailers (including Contractors) | Service Providers (including Mason) | Consumers |
| Players | | | | | |
| Marketing Functions | Product | Existing products and services within the supply chain and how they perform according to the 4Ps (Product Price Place Promotion) | | Consumer preferences, willingness to pay regarding products and services | Existing products and services within the supply chain and how they perform according to the 4Ps |
| | Price | | | | |
| | Place | | | | |
| | Promotion | | | | |
| Support Functions | Coordination | Existing bodies and interventions aiming to coordinate supply / demand | | | |
| | Workforce / Enterprise Capacity | Actors and interventions carried out to strengthen involved enterprises and workforce | | | |
| | Finance | Existing programs, institutions, groups, products available | | | |
| | Quality | Existing quality standards and quality control | | | |
| | Information | Actors involved and their interventions | | | |
| | Incentives | | | | |
| Rules | Policy and Regulations | Existing policies, regulations, social norms impacting on the supply chain and product uptake | | | |
| | Taxes/Tariffs | | | | |
| | Social Norms | | | | |

Source: Market Development Assessment, John Sauer, PSI 2018

Main market failures highlighted by the market matrix process included:

- **Consumers:** Demand for improved latrines is low due to a lack of desirable, affordable products to satisfy consumers. Moreover, programs have largely focused on ending open defecation rather than promoting purchase of improved latrines.
- **Service providers:** Not effectively exploiting the huge market potential and consumer demand for the right product and service.
- **Manufacturers and importers:** There has been market distortion due to the subsidy policy, which prohibits “new” more localized enterprises from entering the market and stifles innovation to develop products, services and business models adapted to a market ecosystem.
- **Businesses:** Some interested businesses lack adequate operating and investment capital but don’t have access to finance. Most businesses also lack basic marketing and record keeping skills and experience.
- **Government:** The new national sanitation policy highlights the need to engage more private sector players at different levels but is not optimally organized or operationalized.

Market analysis findings

The government’s most recent strategy paves the way for growing the sanitation market by reducing subsidies, educating consumers, and organizing sanitation enterprises. In addition, consumers already want improved toilets, the market has significant growth potential, and the local population understands the dangers associated with open defecation and poor sanitation. In fact, most families already have an unimproved latrine, so there is a potential to upgrade to an improved toilet. Also, there are well-established potential marketing channels, like local radio programming and networks of community leaders.

On the other hand, local market players properly engage, including consumers and small and medium-sized enterprises, in the design, planning and implementation of sanitation programming. Both consumers and services providers have been passive actors, with consumers expecting subsidies, and enterprises relying on fixed contracts from the government. Changing their mentality and habits will be a significant challenge and will require updating BCC approaches to focus on constructing improved, rather than traditional, toilets. A crucial challenge is that current available products are not considered by households to be aspirational, nor affordable.

Finance is another major challenge that garnered much discussion and is being considered by ACCES. Cash flow is a problem for both consumers and enterprises due to seasonal fluctuations in income, as well as lack of savings, poor financial planning, and aversion to credit. The absence of financial record keeping and assets also results in difficulties accessing loans. Furthermore, the financial sector has little understanding or information about the sanitation sector so does not seek to invest in it.

Another theme that emerged was a lack of coordination amongst the various actors in the market. There was clear momentum in the group to address this challenge. Government representatives noted that the new strategy emphasizes coordination with the private sector and expressed interest in expanding and evolving its role to further engage and support private sector players. The private sector participants also acknowledged that they could benefit from improved coordination and expressed interest in working with government officials to develop an advocacy plan for changes that would improve the business environment for sanitation enterprises, such as improving the process for certifying new sanitation products.

Product Design

Developing a sanitation market in rural Senegal required adapted latrine models to bring down costs and address household preferences to motivate customers to purchase. In a market, products should be demand-responsive. Available products, such as sanitation slabs for rural households, must be consumer-responsive and offer the desired features and benefits, which are identified through research.

For consumers, the product is what is visible or important to him or her, often what is above the surface: the shelter, slab, or seat. Sanitation marketing strategies target end users (households) and communicate in terms of products and benefits and not in terms of technology options and specifications.

For this, a study using Human-Centered Design (HCD)¹ was implemented. The process included a qualitative latrine study to collect information about the types of latrines used, a design component with masons to create and construct

new models with installation improvements to bring down costs, improved functionality, and ensure quality to guarantee safety. These “new” latrines were submitted to potential users/consumers for appreciation and to integrate their feedback. The masons then developed a final generation of prototypes to receive a second round of feedback. This iteration combining masons with potential customers at the heart of the process resulted in a couple of basic latrine models made with a variety of options like materials used for the cabin, which are more affordable, and adapted to consumer preferences.

Through this process, basic latrine product iterations have continued and constitute, today, one of the main strengths of the entrepreneurs; they have adopted a customer active listening attitude and developed a certain implementation agility. Developing a range of latrine products has also served to open up new markets such as latrine rehabilitations to transform latrines that are unsuitable or in poor condition; developing public toilets that meet the needs of a schools, markets, places of worship, etc. Finally, the search for innovation led ACCES to introduce the SATO Pan as a key latrine component that responds to consumers concerns to eliminate odors and flies/



¹ A philosophy that empowers an individual or team to design products, services, systems, and experiences that address the core needs of those who experience a problem.

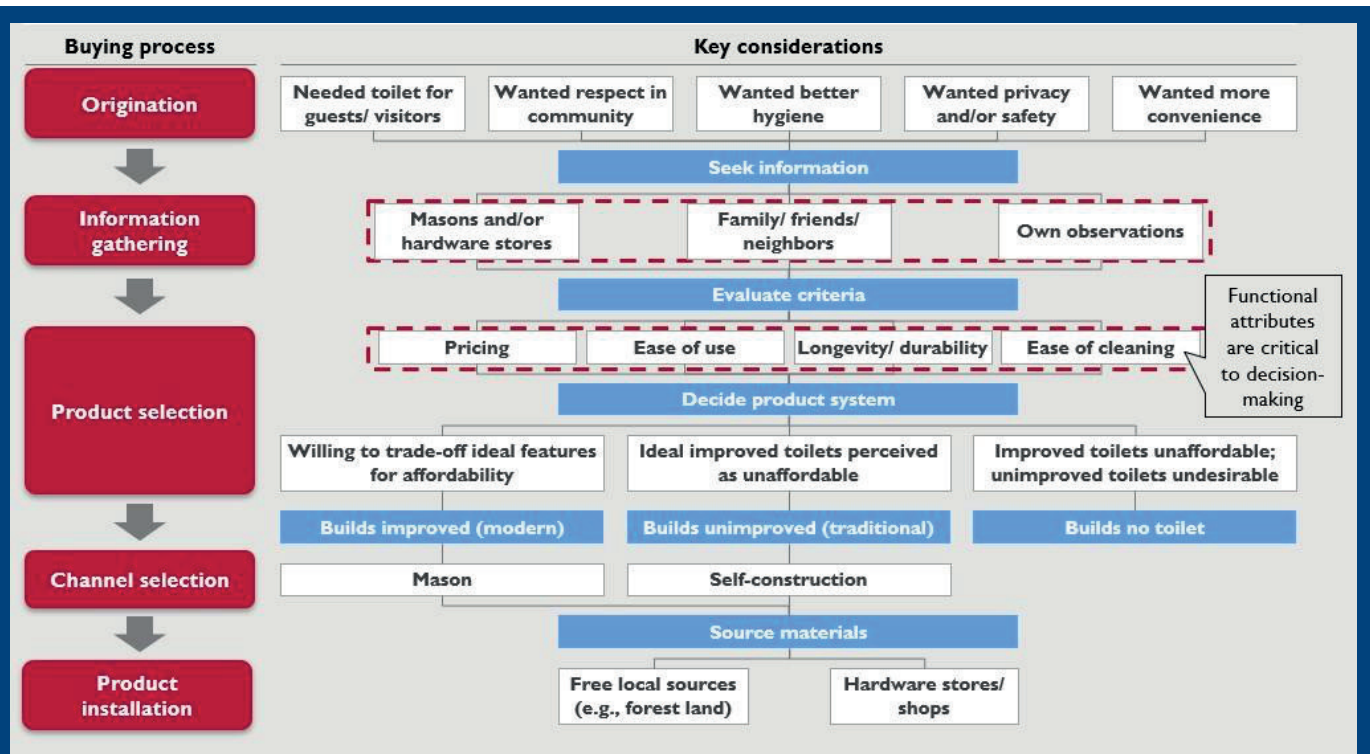
mosquitoes thus making the latrines not only attractive and affordable but also more effective in improving family hygiene.

Product features are different from product benefits. A product's features are its attributes; a product's benefits are what the features convey or provide to the user. For example, a ventilated improved pit includes features such as a mosquito screen and ventilation. The benefits of a ventilated improved pit are freedom from annoying insects and a less unpleasant smell.

DESIGN AND TEST PROMOTIONAL AND MARKETING MATERIALS AND CHANNELS

The ACCES project wanted to develop a modern, harmonized, and consensual communication strategy capable of triggering demand in a nascent sanitation market where households are accustomed to subsidies to acquire latrines.

A research objective of specific interest in sanitation marketing is determining which factors influence open defecation or other behaviors in a given population. The factors that influence behaviors must be understood if they are to be changed through sanitation marketing. These factors, called behavioral determinants, include social norms, what society views as acceptable behavior; access to sanitation suppliers such as hardware stores; and social drivers such as status, among others.



Source: WASHPaLS, USAID/ACCES Brand Assessment, January 2022

To help identify key behavioral determinants for sanitation, WSP and partner organizations developed a simple behavior change framework, called SaniFOAM (see Figure below). This framework makes explicit that improving knowledge alone, for example through information, education, and communication, is often insufficient to stimulate behavior change. Other factors, identified through research, need to be targeted.

To achieve this, ACCES used the below analytical framework to categorize data and analyze it based on the desired behavior to be promoted and by target client. In each section of the table, the data that is considered a promotional asset of the targeted behavior is identified, as well as the data that pose constraints. From there, always in relation to what we want to promote as a behavior, we can identify the data on which we must act.

FIGURE 3 : SANIFOAM BEHAVIOR CHANGE FRAMEWORK

| Focus | Opportunity | Ability | Motivation |
|-------------------|------------------------|--------------------------|------------------------------------|
| Target population | Access/availability | Knowledge | Attitudes et beliefs |
| Desired behavior | Products attributes | Skills and self-efficacy | Values |
| | Social norms | Social support | Emotional/physical/ social drivers |
| | Sanctions/ enforcement | Roles and decisions | Competing priorities |
| | | Affordability | Intention |
| | | | Willingness to pay |

Source: WSP Scaling Up Rural Sanitation: Introductory Guide to Sanitation Marketing, Jacqueline Devine and Craig Kullmann, September 2011

After analyzing the research data, it was established that the health arguments were not convincing enough to motivate the acquisition of a latrine. The determinants that turned out to be those on which action was needed to generate demand were dignity/intimacy, raising the status of the household and the affordability of the product. The communication strategy was built around these determinants.

Product Identity

The market research determined that improved latrines would be best positioned as an unsubsidized aspirational product to be acquired by families who are interested in sanitation. This positioning was further refined during a communication strategy development workshop to be positioned as functional high quality sanitary products, guaranteeing the privacy and dignity of its users while raising the rural head of household and his family's social status.



The second step in the marketing strategy development was to create a product identity specific to ACCES by creating a brand name “Sagal” that includes the various product iterations which themselves have their own names: “Natangué” for the pour flush latrine and “Karangué” for the dual pit latrine. A logo was designed along with a tagline “Sagal sama bopp, sagal sama njaboot” and a clear graphic chart.

Sagal products are marketed to solve three problems associated with latrines: insecurity, lack of emptying options, and discomfort due to odors and insects (flies, mosquitoes, etc.). Sagal products are designed for easy use and maintenance and they are priced to accommodate varying household income levels.

Several variations of the logo, product names, tagline and graphics were tested among different consumer categories in culturally and economically different areas across ACCES’ target regions.

Product Pricing

As mentioned previously, affordability was an important determinant in designing a sanitation marketing strategy and ACCES went through several phases due in part to the consumer segmentation diversity and the ambitious project indicator targets.

During the initial phase of product design and dissemination to local suppliers, training sessions were conducted to ensure that the technical norms were understood and to test the masons’ capacity to replicate the models. During these training sessions, and emphasis was placed on costing the products to ensure that the price covered the materials and margins. Once determined during the training, it was understood that the prices were set and could not be changed due to the generally low household income in rural areas.

While the masons were initially in agreement with the pricing structure, it became clear that there needed to be pricing flexibility as the brand expanded into new communities causing transportation and labor costs to rise. ACCES supported entrepreneurs realized that to remain profitable, prices need to reflect variable costs and therefore agreed to set a base price for each region and calculate the final price during negotiations with the household. This allowed not only for the variable labor and transport costs to be covered, but it also created an opening to for entrepreneurs to offer product options and add-ons.

It is worth noting that this base-price strategy benefitted local entrepreneurs and provided an opportunity for them to develop their market share without competition from larger companies who could not compete with the local price. ACCES’ ability to attract larger, better structured companies and accelerate installation was thus diminished due to high variable costs, relatively low margins on individual sales, and limited volume sales options.

In the last years of the project, the entrepreneurs transformed or left their place to local enterprises with long-term vision and a desire to become profitable. This growth and structuring provide a more solid base to grow and invest in the sanitation industry but also creates fixed costs that need to be integrated into pricing and product diversification strategies. The resulting price liberalization has improved profitability for many enterprises but also redefined their market segment focus.

Product Promotion

Once the product position and identity were finalized, ACCES worked with a local communication firm to create a communication and latrine promotional campaign that include a mix of interpersonal communication through household and consumer group visits, national and local media outlets with radio and television spots, and social mobilization with

Product Fairs are events to provide consumers the opportunity to familiarize themselves with the Sagal brand by meeting different supply chain actors including affiliated companies, their sales representatives, financial institutions offering sanitation loans or savings services. It also provides the opportunity to see sample products and to ask technical questions about the latrine installation. For suppliers, the fair is an opportunity to promote and sell products, collect feedback from potential customers, and reinforce linkages with other actors in the ecosystem.

marketing caravans, and product fairs. This campaign was initially designed to raise awareness about the importance of improved sanitation and to facilitate sales through brand recognition; as communication strategy matured, it became more focused on inciting action to purchase Sagal latrines. Direct marketing materials were used by commercial sales agents, paid on commission, to meet consumers at their homes, in the market, and sometimes in their fields, to introduce the product, listen to the households' problems, and demonstrate how a Sagal latrine can contribute to resolving or alleviating them.

After almost four years of brand use, the WASHPaLS brand assessment determined that while the trigger for a household's desire for a toilet is often emotional or hygiene-related, functional attributes are critical to their final purchase decision. Despite substantial marketing expenditure, Sagal's awareness among its target market is relatively low at just under 30%; this could be due to a lower per unit spend on localized marketing channels, which are more effective.

PRODUCT DISTRIBUTION/PLACE

ACCES struggled to find the most effective distribution model – in part due to the competing priorities within the project and the different segments. We have experimented 4 main distribution channels:

A. The classic household circuits

The first circuit is the classic circuit which requires the salesperson to prospect the household. The latter, if he is convinced and has the means, orders by signing an order form with the contractor who gets his supplies from the hardware store and builds his latrine for him.



B. The circuit of women's associations

This circuit requires that, instead of a household, a group is canvassed at the same time. This group orders from the entrepreneur who gets supplies from the hardware store and builds the latrines in agreement with the group lead. This group might be an association of women formally linked by their activities, such as the women vendors in the Kafounetine market in Ziguinchor or just neighbors who constitute an informal group.



C. The circuit of solidarity groups

During focus group sessions gathered around the village or neighborhood chief, it happens that participants express their intention to acquire a Sagal latrine but do not have the money to pay cash. However, they can pay monthly up to the price of the latrine. For them, the solidarity guarantee mechanism made possible thanks to the agreement signed with Crédit Mutuel du Sénégal (CMS) is activated. For CMS, it consists of financing formal groups of 5 to 10 people. Each member of the group provides an identity document and the contribution corresponding to the price of the latrine that he has chosen. An account is opened in the books of the CMS which requests an estimate from the contractor selected by the group before paying the materials directly to the hardware store. Once the latrines are built, the group certifies it, and the bank pays the contractor.



D. The circuit of professional cooperatives

For instance, this is the circuit of banana producers in the regions of Tamba and Sedhiou. The process requires those responsible to be canvassed first. Following this, they summon all the members to allow a discussion between the sellers of Sagal and the members of the cooperative. Afterwards, a list is opened and members who wish to acquire a Sagal latrine register on the list. The cooperative office requests an estimate from the designated contractor and disburses the amounts according to what is stipulated in the purchase orders to the benefit of the hardware store or the contractor who will install the latrines.



Once the general client segments were identified and prioritized with consumer segment 2 identified as the primary one, it was time to identify the potential market intermediaries to support and map the supply chain in selected municipalities. An initial list of key supply chain actors included hardware store, masons, transporters, local radio, and community groups, associations, or savings and loans associations and MFIs. These different categories of actors were considered critical to the supply chain and delivery model so municipalities lacking them were not included in the first phase.

CONCLUSION

To conclude, the primary socio-geographic consumer segment that interested ACCES is made up of households lacking improved latrines, living in rural, peri-urban and urban areas. This consumer segmentation is subdivided into three segments:

Segment 1: households in rural areas with scattered hamlets characterized by small populations, difficult access to basic services, practicing open defecation. For this segment, ACCES implemented a hybrid Community-led Total Sanitation approach that coupled some sanitation marketing to bring households not only to stop open defecation but to invest, to the extent possible, in more durable sanitation products.

Segment 2: households without improved latrines living in peri-urban and urban areas not belonging to vulnerable poverty quintiles. This became the primary consumer segment for ACCES supported businesses given their purchasing power, geographic concentration, and proximity to suppliers.

Segment 3: very poor households in both rural and peri-urban/urban areas unable a priori to spend tens of thousands of francs on an improved latrine. This segment was targeted through partnerships with NGOs, municipalities, and diaspora groups to provide subsidies.

Through the use of these various strategies, the ACCES project supported businesses, which are around 35, have sold and installed more than 14,000 latrines which represents that more 154,000 people gained access to improved sanitation facilities. This has been realized within a time frame of four years by only one project.

This demonstrates that there is a sanitation market potential in Senegal. The government needs to be more supportive of the private sector by giving clear orientation regarding its new rural sanitation strategy. Private sector is a big player in this new strategy which is very critical to help narrow the sanitation gap.

According to the World Bank report "Reducing Inequalities in Water Supply, Sanitation, and Hygiene in the era of the Sustainable Development Goals", countries will have to spend \$150 billion per year to achieve the Sustainable Development Goal (SDG) on access to services by 2030. This is four times more than they currently invest in water, sanitation and hygiene, and this figure, which is unachievable for the most part, risks jeopardizing poverty eradication efforts.

Countries need to radically change the way they manage resources and provide basic services. It is in this sense that the sanitation marketing is interesting because it allows governments to rationalize the use of resources to be sure to reach the populations that need these most services to ensure the sustainability and efficiency of public services.



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