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37th WEDC International Conference, Hanoi, Vietnam, 2014**SUSTAINABLE WATER AND SANITATION SERVICES
FOR ALL IN A FAST CHANGING WORLD****Sanitation marketing in Kenema, Sierra Leone:
challenges to scale-up and opportunities for success***N. Boot, A. Fawzi, F. Gannon, B. Kirley, W. Mafuta & H. Ringholz, Kenya***BRIEFING PAPER 2034**

A GOAL Community Led Total Sanitation (CLTS) project that began in 2008 recorded great success but later an ODF slippage rate close to 30% was witnessed. Subsequent assessments have found this to be caused by dissatisfaction with the quality of latrines built and a lack of access to markets for improved sanitation hardware. As a result GOAL initiated a sanitation marketing project in 2013 that aimed to improve the access to this market. Initial work focused on assessment of demand and supply at a local level, and some assessment of the institutional environment to assess the projects likely challenges. Demand was found to be high, particularly for aspirational products, but a lack of affordability and remoteness to target communities increasing prices were likely to become key challenges. Following 12 months of formative work, including product development and branding, sales commenced with the sale of 394 products in 3 months.

Background

In 2013 GOAL Sierra Leone commenced a Sanitation Marketing (S-M) project in Kenema District. The project aimed to compliment a Community Led Total Sanitation (CLTS) project that had commenced in the same district in 2008. 710 communities were triggered in this programme over a 4 year period. At the time of commencing the S-M project the number of communities that had become Open Defecation Free (ODF) was 528 or 74% of those triggered. However, a survey carried out on ODF communities in 2013 found that approximately 28% of communities declared ODF 1-2 years prior to the survey no longer had this status at the time of the survey and had reverted to open defecation (OD) (GOAL, 2014).

There were a variety of reasons given for this return to OD, but the principle reason was the poor quality of latrines (rotting local timber slabs, and superstructures not able to resist the rain being principle reasons) and the inability of households to buy improved sanitation products and move up the sanitation ladder (Nestbuilders, 2011). For this reason GOAL SL commenced a sanitation marketing campaign to give people improved access to sanitation products and explore demand for sanitation products in Kenema District.

In the early stages of this project there was a requirement for a local level assessment of demand and supply, this was carried out as part of a Cranfield University MSc study (to build on research already completed by UNICEF for Sierra Leone as a whole (Youssef et al, 2011). This paper offers a briefing on the project to date with particular focus on the work completed on local level demand and supply.

Sanitation marketing

It is recognised that subsidies for sanitation - whilst not harmful per se - can negatively affect the outcomes of sanitation programmes because they do not respond to household concerns or preferences, focussing too much on hardware provision (Evans et al, 2009). These 'supply-driven' programmes are widely criticised (Lechner, 2013). These failures have been ascribed to a lack of community ownership in the planning, implementation and upkeep of their own sanitation facilities (ibid).

GSL's S-M pilot project utilised a demand-driven approach which uses marketing concepts and tools to bring about 'voluntary adoption of adequate sanitation' (Youseff et al, 2011). The active participation of the

private sector in GSL’s S-M model is a crucial element in enabling the provision of desirable and affordable sanitation products.

The initial stages of a sanitation marketing programme are crucial to determining this success. During these stages, key stakeholders are brought together and market research into the behaviours and preferences of potential consumers is undertaken, and the product design process takes place. The aim of this process is to produce appropriate and viable designs which can be brought to market; during this process local factors are considered in order to create the most affordable, desirable and feasible designs.

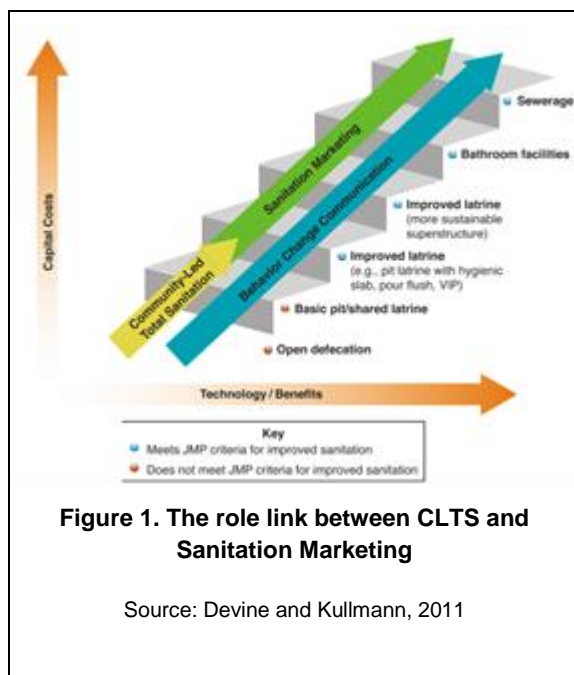


Figure 1. The role link between CLTS and Sanitation Marketing

Source: Devine and Kullmann, 2011

CLTS and Sanitation marketing link

“Total Sanitation and Sanitation Marketing” (TSSM) refers to the complementarity of CLTS and Sanitation Marketing (WaterAid et al, 2012). TSSM aims to combine the two approaches: where CLTS can ‘trigger’ communities to move towards the lower rungs of the sanitation ladder, S-M moves target populations ‘up the sanitation ladder’, encouraging more aspirational sanitation, as shown in Figure 1.

It is within this context, seeking to ensure sustainable change, and to build on the results obtained through CLTS, that GOAL sought funding for the S-M programme which it is now implementing (GOAL, 2012).

The following sections outline challenges and lessons learnt from GOAL’s project which was informed by research undertaken as part of a Cranfield University MSc study.

Methodology

The overall aim of the MSc research study was to identify key challenges to the establishment of a viable market for sanitation products, as well as opportunities for success. Research focussed on:

Demand: Assess to what extent a market for sanitation exists, focussing on the current behaviours of local population, the desirability and affordability of latrine products, and motivations for purchase.

Supply: Assess to what extent the local private sector is able to meet the demand for sanitation, focusing on the capacity of local masons’, their awareness of challenges, and proposed methods of solving them.

A quantitative study was undertaken into the preferences and motivations of the rural population; this involved semi-structured interviews and community meetings. In addition, a qualitative understanding of the supply side was ascertained through interviews with local masons and representatives of government and partner NGOs, to identify opportunities and challenges.

Demand for products

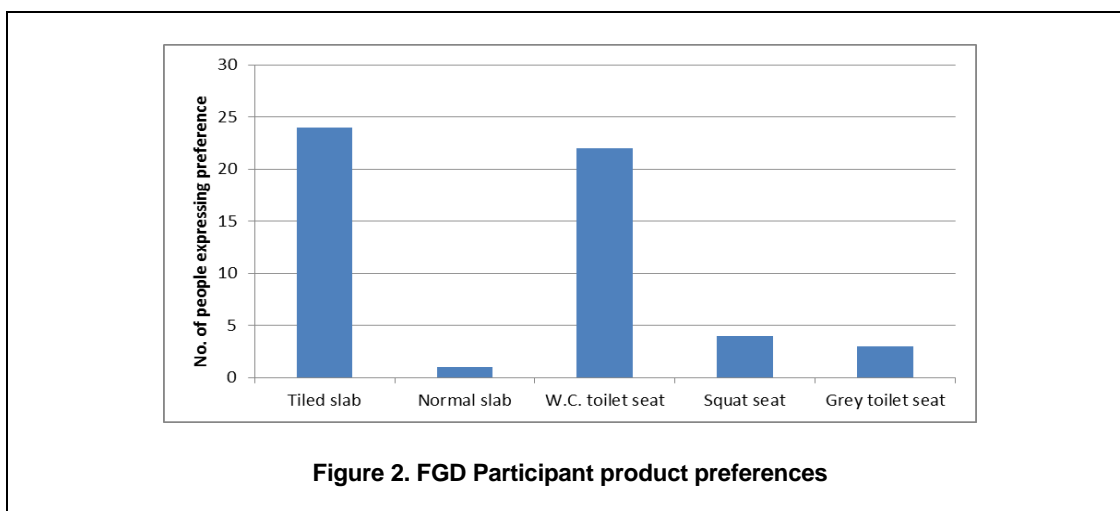
Following the development of a range of products they were tested in a selection of target communities. The response in the villages was very positive; considerable interest was aroused by the sample products. A great number of individuals quickly expressed an interest in purchasing. Questions were enquiring and constructive, covering a range of topics but generally focusing on cost and transaction arrangement.

Table 1 below shows photos of the range of products developed and the anticipated sale cost per item, these were then shown to a focus group to gain an insight into preferences (excluding the domed slab which was added later in the project). The focus was primarily on slabs as this was the primary reasons for abandoning latrines, and also the component where failure of local materials is less easily fixed. The costs of a full range of tasks were assessed by Youssef et al (2011). In reality most households in rural areas will excavate their own pit before the mason arrives.

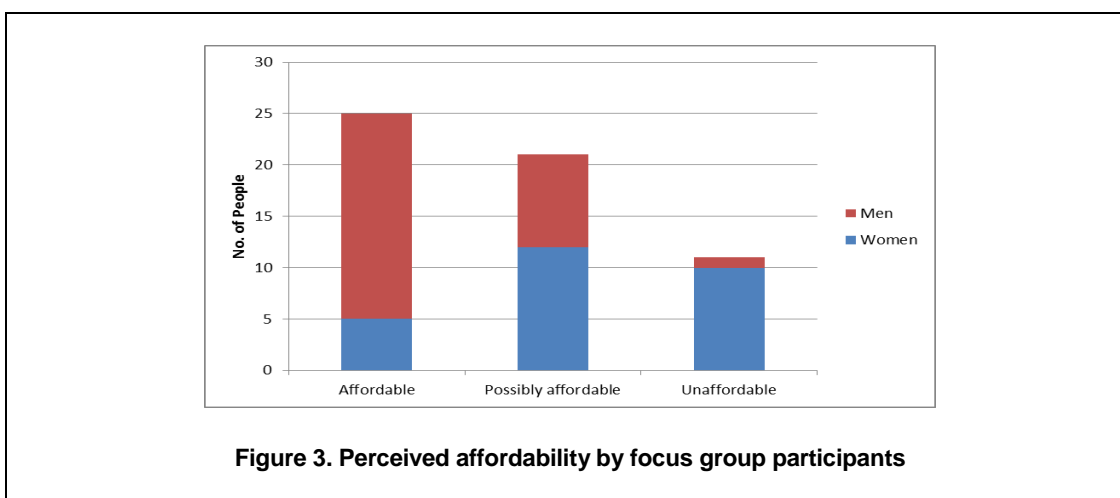
Table 1. Summary of product samples from first round of product design process run by GOAL

Product	Sales Cost (as of Dec 2013) (\$)	Anticipated cost per item (\$ (for FGD)	Image
Luxury seat	23	27	
Tiled squat seat	17	17	
WHH sample toilet seat	n/a	15	
Tiled slab	39	66	
Non-tiled slab	26	59	
Tiled shower slab	39	66	
Domed Slab (added later in project so not included in below FGD)	12	n/a	

With this range of products FGDs were conducted, figure 2 shows the results recorded in terms of product preference. It is interesting to note such overwhelming preference for what are deemed as the more aspirational products, and these are ones that people are more likely to buy than those seen as something constructed by an NGO. The primary focus of this project should thus be to translate this aspiration into sales. Payment by instalment was preferred unanimously during FGDs and as such the project aims to provide viable forms of credit.



Based on the quoted anticipated prices, the majority of male interviewees said they would certainly be able to afford the products, or possibly be able to afford them depending on their future circumstances. As shown in Figure 3, Women were less likely to be able to afford the products, with a slim majority saying their ability would depend on circumstances, but for a significant minority the products would be unaffordable. Some of these women expressed the opinion that they would be unable to afford the products, and they requested assistance from GOAL.



According to Youssef et al. (2011), “rural non-owners [in Sierra Leone] are sceptical of a latrine under US\$50, but are unable and/or unwilling to pay US\$100 for a latrine”, while “latrine owners are willing to pay more”. With respect to the GOAL product samples, the cost of the most expensive seat and slab combination, at anticipated prices, is \$100. Therefore this could be on the upper limit of what rural non-latrine owners are expected to be willing to pay for a latrine *in total* (including structure). Based on this analysis, and on the affordability results presented in Figure 2, it should therefore be a priority for GOAL to seek ways to reduce the cost of the products, which was achieved (shown also in Table 1).

Consumer motivations were also gauged during the FGDs, the results of which suggested GOAL should focus marketing efforts onto non-health related motivators.

Supply assessment

There was also an investigation into the potential supply of products. This investigation showed a range of suppliers who seemed very interested in becoming involved in the project, motivated by receiving a potential boost to business, and improving the situation of their communities. Importantly the potential

suppliers were quick to identify potential challenges shown in Table 2, along with other challenges experienced during project implement.

Challenges	Mitigation
Financial capacity of masons is low, they lack the ability to invest in materials needed upfront	Contract rural masons through bigger businesses in Kenema who can support up-front material costs
Transportation of materials to rural areas will increase cost due to poor roads	Cooperation between suppliers and masons could help to transport material in bulk
Ability of households to cover the cost of the most desirable latrine products	Ensure access to finance (through village savings and loans schenes) or credit offered by suppliers; later a dome slab was also introduced to provide a more affordable product
Lack of acceptance of the S-M approach by local authorities	Inclusion of local authorities in working groups so they could learn more about Sanitation Marketing
Low awareness of S-M product range	Development of robust marketing strategy

Commencement of marketing and sales

The brand of Alafia was officially launched by the Ministry of Health and Sanitation on 31st of October 2013. Alafia is a brand name that represents luxury, comfort, dignity and safety associated with the product. A marketing methodology was developed and is shown in Box 1. Sales of latrine products commenced in December 2013 and sales to-date are shown in Table 3.

These promising initial sales exhibit that branding, product design and marketing have worked to an extent and GOAL SL will continue to monitor these sales and the impacts that credit systems are having on enabling the poorest to gain access to these products.

<ul style="list-style-type: none"> • Radio Jingles – two minute jingle in local languages (Krio and Mende) were designed and aired on two radio stations in the two targeted chiefdoms • Street Theatres – a script was written for a play that was later performed in the main towns of the programme targets area, it portrayed the importance, reduced health costs and increased social benefits associated with using the Alafia products. After each play at least 20 households would order a latrine product. • Billboards – signboards designs were pre-tested, with involvement of the local government ministry of health and sanitation department, these were then erected at two critical locations in target chiefdoms. • Demonstration Sites – Twenty demonstration sites were constructed in the sectional towns across the two targeted chiefdoms, where customers can see the Alafia products on display and arrange for purchase.

Product	Number of Sales
Domed Slab	25
Luxury Seat	53
Tiled Squat Seat	313
Non-Tiled Flat Slab	3
Total Sales	394

Lessons learnt

- The arrangements surrounding cost and payment procedures are very important to customers and should receive as much attention as product design; this will increase the perception of community members that products are affordable. A variety of means for financing could be explored including supplier credit and village savings and loans associations (VSLA). Initial attempts to work with a micro-finance organisation failed in this project, and now a VSLA approach is being initiated in the project, Efforts to link these associations to the suppliers in an attempt to further reduce costs via bulk purchases will continue.
- The involvement of key stakeholders is essential. The market research into consumer behaviours and preferences is vital to identifying and devising appropriate solutions. The local private sector must be invited to take a lead in identifying potential challenges, and seeking ways to solve them. They are aware of details which may be important but which the implementing NGO staff may be unaware, e.g. logistical considerations which must be considered, fluctuations in materials etc.
- Aspirational designs are paramount. The research has backed up the notion that consumers are more likely to pursue aspirational designs, even if it means the designs will cost more.
- The approach is novel in the target communities. Therefore targeted and on-going sensitisation is necessary to explain to communities the nature of the programme, emphasising that there is no subsidy.
- From the perspective of the implementing organisation, a hands-off approach is essential; in order to encourage sustainability in the longer term when the organisation withdraws.
- Acceptance by authorities is likely to have an impact on a projects success
- Finding the correct service provider to engage with can be a challenge; out of 37 concrete producers engaged by GOAL only 1 became fully involved in the project from the outset under self-interest. Since product sales and marketing a further 2 have started operations. A lack of understanding of the approach and familiarity with sanitation subsidies have put off suppliers.

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Note/s

Note this project will come to an end at the end of June 2014 and requires funding to continue.

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