

Price Elasticity Study for SMC Products

Final Report

Submitted to:

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September 10, 2012



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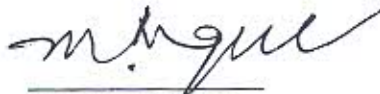
Dear Mr. Rahman,

Please find attached 11 copies of final report on the above. We hope you will find the same in order.

We take this opportunity to thank you for entrusting us with the assignment of carrying out such an important study.

Assuring you our full cooperation at all times.

Kind regards,



Monzurul Haque
Chairman & Managing Director

Table of Contents

Appendix - A: Detailed Tables on OCP	2
Executive Summary:.....	3
1. Background and Method:	7
1.1. Background:.....	7
1.2. Purpose of the Study:.....	7
1.3. Target Respondents:	8
1.4. Geographical Coverage:	8
1.5. Technique/Model:.....	8
1.6. Achieved Sample size and distribution:	9
1.7. Sample selection:.....	9
1.8. Data collection period: May/June, 2012.....	9
2. Detailed Findings on OCP:.....	10
2.1. Awareness and Usage:.....	10
2.2. Attribute rating of different brands on 5 point agreement – disagreement scale:	11
2.4. Opinion on current brand:.....	12
2.5. Price Elasticity:.....	17
2.6. Price of Implant:	23
3. Detailed Findings on ECP:	25
3.1. Awareness and Usage:.....	25
3.2. Attribute rating of different brands on 5 point agreement – disagreement scale:	26
3.3. Buying pattern:	27
3.4. Opinion on current brand:.....	27
3.5. Price Elasticity:.....	30
3.6. Price of Implant:	32
4. Findings on SDK:	34
4.1. Awareness and Usage:.....	34
4.2. Attribute rating of different brands on 5 point agreement – disagreement scale:	34
Table – 4.3: Number of Times Used SDK So far (Q.10)	35
Table – 4.4: Place of Procurement (Q.11)	35
4.4. Opinion on current brand:.....	35
4.5. Price Elasticity:.....	38
4.6. Price of Implant:	40
5. Detailed Findings on Injectable:.....	42
5.1. Awareness and Usage:.....	42
5.2. Attribute rating of different brands on 5 point agreement – disagreement scale:	42
5.4. Opinion on current brand:.....	43
5.5. Price Elasticity:.....	47
5.6. Price of Implant:	48
Appendices – soft copies:	
Appendix - A: Detailed Tables on OCP	
Appendix - B: Detailed Tables on ECP	
Appendix - C: Detailed Tables on SDK	
Appendix - D: Detailed Tables on Injectable	
Appendix – E: Questionnaires	

Executive Summary:

Objective:

The prime objective of the study was to measure the demand elasticity of selected SMC products - OCPs, injectable and SDK, and to determine the consumer acceptance of these products at different price levels. As such the Executive Summary emphasizes mainly on areas related to the objective of the study. For other details one may go through the detailed report and tables in appendices. The following section summarizes key findings on different products one by one.

OCP Summary:

Awareness and usage: Femicon was almost universally aware of brand amongst the OCP users, followed far behind by Femipil and Minicon. Other major aware of brands include Ovostat Gold, Marvelon and Noret – 28. Similar pattern was found in terms of current usage as well. Femicon was the most used current brand amongst the OCP users, followed far behind by Femipil. Other notable brands were Ovostat Gold, Minicon, Noret – 28 and Marvelon.

Attribute rating: This shows that with the exception of rating on price, most brands received relatively higher scores on positive statements and lower scores on negatives. With regard to price, while Ovostat Gold and Marvelon were considered most expensive, Femipil was rated as least costly. Femipil was also rated as a good product both on product and image attributes, more or less close to Femicon.

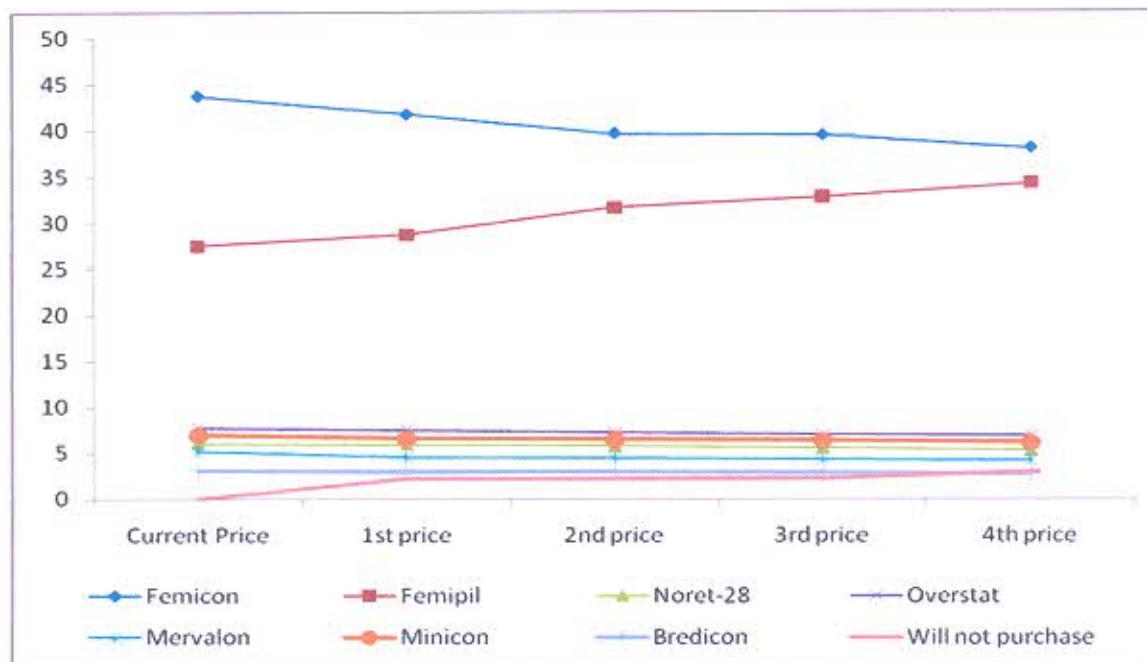
Satisfaction rating of current brand: With regard to satisfaction rating all the brands obtained more than 4.00 on a 5 point scale, indicating that the users were quite satisfied with their respective current brand. In percentage term an overwhelming majority of the current users were either satisfied or very much satisfied with the brand. However, when price was taken into consideration, satisfaction ratings went down for Femicon, Ovostat Gold, Marvelon and Bredicon significantly, indicating not very good value for money of these brands.

Brand loyalty: If own brand was not available in the usual place of purchase, mostly would search in another store. However, only a few opined to switch brand or method. Amongst those who will search in other stores, an overwhelming majority will continue searching till current brand is found, indicating a high level of brand loyalty for most of the brands. However, Marvelon users seemed most loyal, followed by Ovostat Gold and Minicon.

Market share of different brands at different price points: Findings reveal that, with the increase in price share of all the brands with the exception of Femipil declined, and some will desert from OCP. However, Femicon being the largest brand is likely to lose most to Femipil, indicating a cannibalization of own brands as can be seen from the following graph. This would happen perhaps because in every price point price of Femipil was lowest among all the brands tested, offering best price option with increase in price, which also offers good value for money with reasonably good product and brand image as discussed earlier. SMC may carry out a cost benefit analysis before taking a pricing decision. However, the good news is,

OCP users appeared to be method loyal, and hence the market is not likely to shrink heavily with increase in price within a tolerable limit.

Brand share of OCP at different price points



ECP Summary:

Awareness and Usage: Norpil users seem to be aware of their current brand of ECP only. On the other hand some users of Imcon also know about Norpil, as awareness of Norpil is higher than its usage. However, of the total ECP users about two-thirds use Imcon and the rest one-third use Norpil.

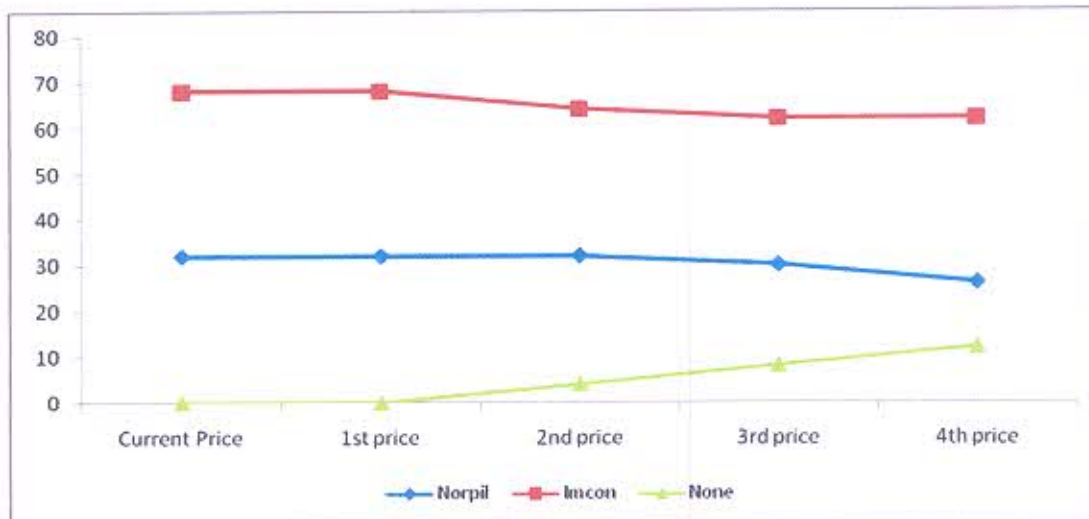
Attribute rating: Both the brands of ECP received more or less good product and image rating as positives are reasonably high and negatives low. However, neither of the brands was found well aware of.

Satisfaction rating of current brand: Like OCP, both the brands obtained 4.00 or more on a 5 point scale, indicating that the users were quite satisfied with their respective current brands, and in percentage term an overwhelming majority was either satisfied or very much satisfied with the brand. However, when price was considered, satisfaction ratings went down for both significantly.

Brand loyalty: If own brand is not available in the usual place of purchase, mostly will search in another store. However, only a few opined to switch brand or method. Amongst those who will search in other stores, an overwhelming majority will continue searching till current brand is found, indicating a high level of brand loyalty for both the brands. However, Imcon users seemed more loyal than Norpil users.

Market share of different brands at different price points: As can be seen from the following graph, hardly any brand switch will take place with increase in price. However, some dropouts are likely to take place as can be seen from the following graph.

Brand share of ECP at different price points



SDK Summary:

Awareness and Usage: Awareness and usage of SDK seem identical, meaning a user only knows about her own brand. However, Safety Kit is the most used brand used by 84% of the respondents, and rest use Kallyani.

Attribute rating: Both product and image rating of both the brands were very good and both received high scores on positives and low on negatives.

Satisfaction rating of current brand: Satisfaction was high for both the brands with or without price, and much higher for Kallyany compared to Safety Kit.

Brand loyalty: If own brand is not available in the usual place of purchase, mostly will search in another store. However, only a few opined to switch brand, and some will use other method. Amongst those who will search in other stores, an overwhelming majority of Kallyani (80%) and 51% Safety Kit will continue searching till current brand is found, indicating a high level of brand loyalty of Kallyani than Safety Kit.

Market share of different brands at different price points: While Kallyani would hardly lose any share with increase in price, share of Safety Kit would erode, who would dropout of the method as can be seen from the following graph.

Brand share of SDK at different price points



Injectable Summary:

Awareness and Usage: Interview was taken only amongst Somajet users. However, of the total users about 14% were not aware of their own brand. On the other hand about 30% of Somajet users knew about Depoprovera.

Attribute rating: Users seemed to be quite happy with their currently used brand as the scores were quite high on positives and low on negatives, including price. Depoprovera also obtained good score from those who were aware of it.

Satisfaction rating of current brand: Brand satisfaction score was above 4.0 on 5.0 point scale, indicating that the users were broadly satisfied with the brand, which however went down to 3.90 with price taking into consideration, revealing some dissatisfaction about its price.

Brand loyalty: If own brand was not available in the usual place of purchase, about two-thirds will search in another store. However, a large segment, about one-fourth will use other method and a small segment (4%) would switch to another brand. Amongst those who will search in other stores, an overwhelming majority (84%) will continue searching till current brand is found, indicating a high level of brand loyalty amongst them.

Among those who will switch to other method, 55% will use OCP, 17% Condom, and 7% each will use IUD and Vasectomy. On the other hand, among those who will switch to another brand at any point, about half will use Depoprovera, and the rest will use whatever advised by doctor in particular and husband.

Price Elasticity: A small number (5%) were unwilling to accommodate any increase. However, about one-third of Somajet users are likely to dropout of the brand if its price is increased by up to BDT 25, about 60% would dropout if it's increased by more than BDT between BDT 25 and 50. Above BDT 50 it would lose more.

1. Background and Method:

1.1. Background:

Social Marketing Company (SMC) markets four brands of Oral Contraceptives (OCs), five condom brands, injectable, SDK and packaged ORS (ORSaline & Fruity) through retail pharmacy and non-pharmacy outlets. Quite a few SMC brands are sold at very subsidized prices to cater to the needs of the low-income population. Price of ORS and all pills are controlled by the Drug Administration. We only have full flexibility in terms of pricing for the condom category and SDK. SMC's pricing policy is based on the premise that while the low-income population segment cannot afford higher prices and needs subsidy, donors should pay for the commodities. All the other mid-range and high end brands must implement the optimal pricing strategy in order to maximize revenue of the company for attaining sustainability.

Due to the significant increase in the cost of business recently mostly as a result of increased commodity and raw material costs, SMC's revenue also has to increase correspondingly. In order to substantially increase revenue, the company's key option is to raise the prices of its products, especially of those that are priced for higher income groups. Subsidized prices of the low-end segment should also ideally be adjusted at least in conformation with the inflation rate so that it is possible for SMC's operations to be sustainable.

Keeping the above view in mind, SMC initiated to conduct this pricing research to understand the feasibility of reviewing the current pricing policy.

1.2. Purpose of the Study:

The prime objective of the study is to measure the demand elasticity of selected SMC products - OCPs, injectable and SDK. And also to determine the consumer acceptance of these products at different price levels, so as to estimate the corresponding market sizes and, accordingly, decide on the most appropriate price for each brand in relation to respective market share.

While the specific objectives of the study were as follows:

Among Consumers:

- To determine Perceptual quality of SMC's brand vis-a-vis other available brands
- To determine buying pattern (frequency of buying, Quantity of purchase and consistency of purchased brand)
- To understand the overall satisfaction level with current prices of all products
- To assess brand loyalty and influencing factors for switching brand
- To measure the impact of price increase at different price points on the decision to buy among both current and potential users of the brand;

- To gauge the action current users of a brand would take if they discontinue use of their current brand due to price increase.
 - At what price do they begin to think of the product is expensive that they would not consider buying it?
 - To determine what is the most acceptable price to pay?
 - To understand the correlation of potential volume of the products to be purchased by customers at different retail price point.
- Demographic and economic profile of the current users.

Among Retailers (Pharmacies and Non-pharmacies):

- Assessment of the impact of price increase at different price, points on consumer's decision to buy their current brand;
- At increased price, opinion on which brands would benefit most due to attrition from current users;
- Recommended MRP and Trade Price.

1.3. Target Respondents:

Definition of Consumers: Current users of SMC and competition brands of oral contraceptive pills (OCPs), Injectable, and SDK.

Definition of retailers: Pharmacy retailers those who are currently selling SMC OCPs, Injectable and SDK as well as competitor's brand.

1.4. Geographical Coverage:

All 6 geographical divisions, covering both urban and rural level areas.

1.5. Technique/Model:

This was a quantitative study, and the technique was Band/price trade off model.

1.6. Achieved Sample size and distribution:

	Users		
Product	Urban	Rural	Total
OCP			
Femicon	168	176	344
Femipil	102	101	203
Noret-28	28	22	50
Minicon	22	32	54
Marvelon	27	19	46
Ovostat Gold	36	26	62
Bredicon	13	5	18
TOTAL	396	381	777
ECP			
Norpil	14	2	16
Emcon	31	3	34
TOTAL	45	5	50
Injectable			
Somaject	53	52	105
SDK			
Safety Kit	18	114	132
Kallayani	-	22	22
Total	18	136	154
	Retailer¹		
Product	Urban	Rural	Total
OCP	68	61	129
Injectable	9	9	18
SDK	7	9	16
Total	84	79	163

1.7. Sample selection:

Respondent category	Sampling technique
OCP User	Systematic random to capture different brands, age group and SEC
Injectable user	Snowballing since its penetration is very low
SDK user	Snowballing since its penetration is very low
Retailer	Systematic random sampling technique

1.8. Data collection period: May/June, 2012

¹ This report does not include findings from retailers as the data obtained from retailers are hypothetical and distort consumer data.

2. Detailed Findings on OCP:

2.1. Awareness and Usage:

Femicon was almost universally aware of brand amongst the OCP users, followed far behind by Femipil and Minicon. Other major aware of brands include Ovostat Gold, Marvelon and Noret – 28.

Similar pattern was found in terms of current usage also. Femicon was the most used current brand amongst the OCP users, followed far behind by Femipil. Other notable brands were Ovostat Gold, Minicon, Noret – 28 and Marvelon as can be seen from the following table.

Table – 2.1: Awareness and Usage of Selected Brands (Q.6)

	Awareness			Current Usage		
	Urban	Rural	All	Urban	Rural	All
	%	%	%	%	%	%
Femicon	97.73	97.38	97.55	42.42	46.19	44.27
Femipil	59.09	68.24	63.58	25.76	26.51	26.13
Noret-28	39.90	24.41	32.30	7.07	5.77	6.44
Ovostat Gold	56.57	37.27	47.10	9.09	6.82	7.98
Marvelon	45.20	29.40	37.45	6.82	4.99	5.92
Minicon	64.39	60.37	62.42	5.56	8.40	6.95
Bredicon	6.57	6.30	6.44	3.28	1.31	2.32
Norpil	10.35	7.87	9.14	Not asked	Not asked	Not asked
Imcon	2.53	2.36	2.45	Not asked	Not asked	Not asked
Base - All Respondents	396	381	777	396	381	777

2.2. Attribute rating of different brands on 5 point agreement – disagreement scale:

Rating was done by those who were aware of a particular brand, irrespective of their current use. As can be seen from the table below, there were both positive (majority) and negative (a few) statements. For positive statement higher score, better the rating and for negative statement opposite is the case.

As can be seen below, with the exception of rating on price, most brands received relatively higher scores on positive statements and lower scores on negatives. With regard to price, while Ovostat Gold and Marvelon were considered most expensive, Femipil was rated as the least costly. Femipil was also rated as a good product both on product and image attributes, more or less close to Femicon.

Table – 2.2: Attribute rating of different brands on 5 point scale (Q.7 and 8)

Mean score on 5 point scale

	Femicon	Femipil	Noret-28	Ovostat Gold	Marvelon	Minicon	Bredicon	Norpil	Imcon
Product Attributes									
A well known brand	4.70	4.34	4.06	4.05	3.99	4.24	3.57	3.43	2.72
Modern brand	3.41	3.63	4.10	3.81	3.82	3.56	4.05	3.92	3.94
High quality brand	4.03	3.86	4.25	4.24	4.27	3.84	4.00	4.05	3.89
Local quality brand	4.33	4.28	4.17	3.91	3.82	4.18	3.80	4.14	3.69
International quality Brand	3.09	2.95	3.54	3.75	3.84	3.05	3.44	3.58	3.00
Low quality brand	2.05	2.18	1.82	1.86	1.78	2.22	2.07	2.03	2.44
Antiquated (Old time) brand	2.90	2.54	2.10	2.52	2.41	2.73	1.95	2.23	2.17
Easily available	4.62	4.55	4.08	4.01	3.92	4.28	3.73	3.64	3.69
High price	2.54	1.82	3.02	3.88	4.20	2.52	3.28	3.64	3.77
Good value of money	4.05	4.06	3.99	3.80	3.87	3.93	3.89	3.71	3.86
Low price	3.52	4.26	3.11	2.27	1.83	3.50	2.74	2.44	2.50
Image Attributes:									
Low dosage	4.33	4.35	4.05	3.71	3.82	4.21	3.55	3.13	2.31
High dosage	1.90	1.77	2.16	2.38	2.27	2.02	2.61	2.96	3.53
Less side effect	3.96	4.02	3.94	3.74	3.79	3.98	3.55	3.36	3.13
High side effect	2.12	2.00	2.13	2.26	2.20	2.09	2.38	2.67	3.33
Very effective	4.04	4.04	4.03	3.99	3.90	3.97	4.02	3.90	4.07
Less effective	2.04	1.96	1.96	2.05	2.09	2.08	2.05	2.36	2.00
Adjustment	4.24	4.22	4.05	3.83	3.96	4.13	3.95	3.61	3.71
Base - Those aware	758	494	251	366	291	485	50	71	19

2.3. Buying Pattern:

Mostly buy OCP once a month, and only a few once in two months or less frequently both in urban and rural areas. It is interesting to note that all of those who buy once a month purchase one packet at a time as can be seen from the following tables. The same pattern is true for others as well.

Pharmacy is the most common place of purchase where more than 90% buy OCP from. However, in rural areas about 6% buy from health-workers.

Table – 2.3: Frequency of Buying (Q.9)

	All	Area	
		Urban	Rural
Once in a month	97.30	96.21	98.43
Once in two months	1.80	2.53	1.05
Less than once in two months	0.90	1.26	0.52
Base - All Respondents	777	396	381

Table – 2.4: Number of Packs Bought at a Time (Q.10)

	All	Area	
		Urban	Rural
One packet	97.30	96.21	98.43
Two packets	1.80	2.53	1.05
More than two packets	0.90	1.26	0.52
Base - All Respondents	777	396	381

Table – 2.5: Place of Purchase (Q.11)

	All	Area	
		Urban	Rural
Pharmacy	94.47	98.48	90.29
Blue-star pharmacy	0.39	0.25	0.52
Clinic/Hospital	0.51	0.51	0.52
Doctor	0.64	0.25	1.05
Health-worker	3.22	0.25	6.30
Grocery shop	0.77	0.25	1.31
Base - All Respondents	777	396	381

2.4. Opinion on current brand:

Reasons for using current brand and likes noticed: Reasons for using and likes noticed of respective current brands were more or less the same. Major reasons and likes noticed of respective current brands were 'Adjusted with body', 'No vertigo/dizziness', 'No nausea

effect', 'Don't feel weak', 'Keeps health in order' and 'Easily available'. For Femipil, 'Low price' was also mentioned as a major reason', unlike other brands.

Table – 2.6: Reasons for using current brand (Q.12)

Figures in percentage

	Femicon	Femipil	Noret-28	Ovostat Gold	Marvelon	Minicon	Bredicon	All
Adjusted with body	61.05	57.64	66.00	69.35	54.35	38.89	22.22	58.30
No vertigo occurs	38.95	29.56	36.00	35.48	26.09	16.67	16.67	33.20
No nausea effect	27.03	21.18	24.00	14.52	15.22	12.96	5.56	22.14
Don't feel weak	15.70	13.30	12.00	14.52	21.74	11.11	11.11	14.67
Keeps health in order	12.21	10.84	14.00	17.74	13.04	5.56	5.56	11.84
Easily available	14.24	11.82	6.00	14.52	6.52	3.70	5.56	11.71
Low-priced	5.81	21.18	6.00	0.00	0.00	9.26	0.00	9.14
No Side Effect	9.01	9.85	12.00	4.84	15.22	3.70	5.56	9.01
Doctor's Advice	2.62	3.45	12.00	9.68	15.22	33.33	72.22	8.49
Produces adequate breast milk	0.87	5.42	4.00	0.00	2.17	64.81	50.00	7.85
Base - All Respondents	344	203	50	62	46	54	18	777

Table – 2.7: Likes noticed of current brand Q.14

Figures in percentage

	Current Brand							All
	Femicon	Femipil	Noret-28	Ovostat Gold	Marvelon	Minicon	Bredicon	
Adjusted with body	48.84	43.84	52.00	43.55	45.65	37.04	22.22	45.69
No vertigo occurs	38.66	36.95	44.00	37.10	32.61	27.78	33.33	37.19
No nausea effect	32.27	26.11	22.00	22.58	26.09	16.67	11.11	27.28
Don't feel weak	17.73	19.21	18.00	20.97	21.74	5.56	11.11	17.63
Keeps health in order	13.66	11.82	18.00	19.35	8.70	9.26	11.11	13.26
Easily available	12.50	11.82	14.00	8.06	4.35	5.56	0.00	10.81
No side effect	8.72	10.34	18.00	11.29	15.22	5.56	22.22	10.42
Low-priced	7.27	17.24	6.00	1.61	0.00	11.11	0.00	9.01
Menstruation remains regular	9.30	4.43	6.00	11.29	15.22	1.85	0.00	7.59
Produces adequate breast milk	0.58	3.45	0.00	0.00	4.35	68.52	50.00	7.34
Base - All Respondents	344	203	50	62	46	54	18	777

Dislikes noticed: Except for Bredicon, less than 20 of respective users noticed some dislikes of the current brand. However, major dislikes noticed were “dizziness/vertigo”, ‘Weak feeling’, and ‘Nausea feeling’. For Femicon, Femipil and Bredicon ‘Irregular menstruation’ was also mentioned.

Graph – 2.1: Notice-ability of dislikes f current brand (Q. 15)

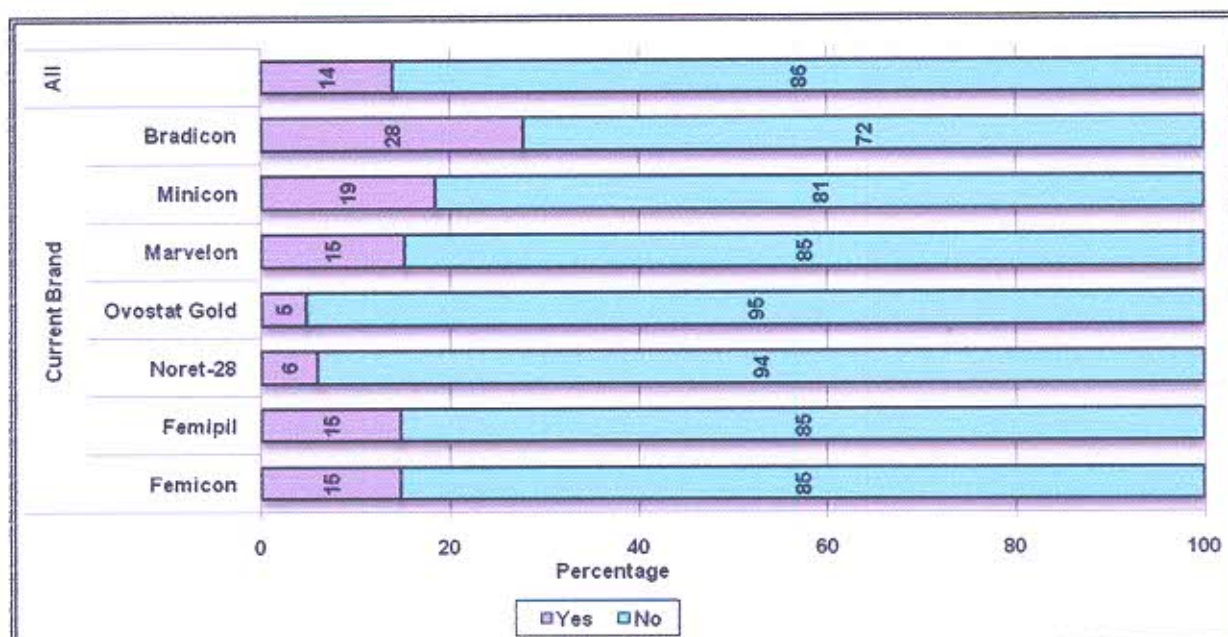


Table – 2.8: Dislikes noticed of current brand (Q16)

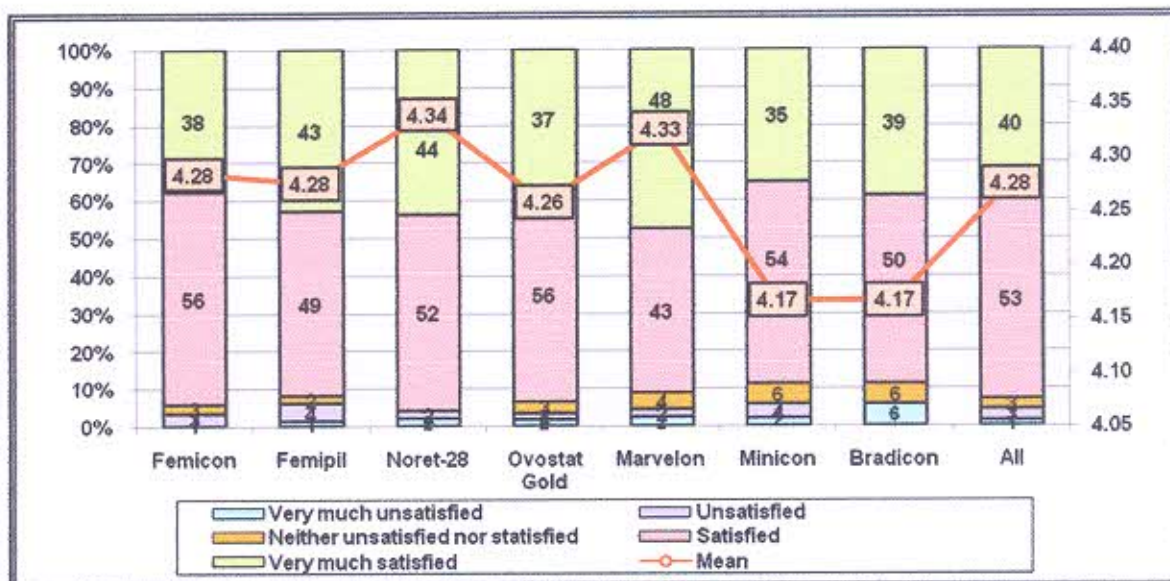
Figures in percentage

	Current Brand							All
	Femicon	Femipil	Noret-28	Ovostat Gold	Marvelon	Minicon	Bredicon	
Causes vertigo/dizziness	39.22	40.00	66.67	66.67	28.57	50.00	40.00	41.28
Feel weak	31.37	43.33	66.67	66.67	0.00	20.00	60.00	34.86
Causes nausea feeling	21.57	23.33	33.33	0.00	28.57	20.00	40.00	22.94
Irregular menstruation	15.69	26.67	0.00	0.00	0.00	0.00	20.00	15.60
high price	9.80	3.33	0.00	0.00	14.29	10.00	0.00	7.34
Excess sleep	7.84	3.33	0.00	33.33	0.00	0.00	0.00	5.50
Body weight increased	7.84	0.00	0.00	0.00	14.29	0.00	0.00	4.59
Excessive bleeding during menstruation	1.96	3.33	0.00	0.00	0.00	30.00	0.00	4.59
Loss of appetite	3.92	0.00	0.00	0.00	0.00	20.00	0.00	3.67
Inadequate breast milk	3.92	0.00	0.00	0.00	14.29	0.00	20.00	3.67
Base - Those express dislike about current brand	51	30	3	3	7	10	5	109

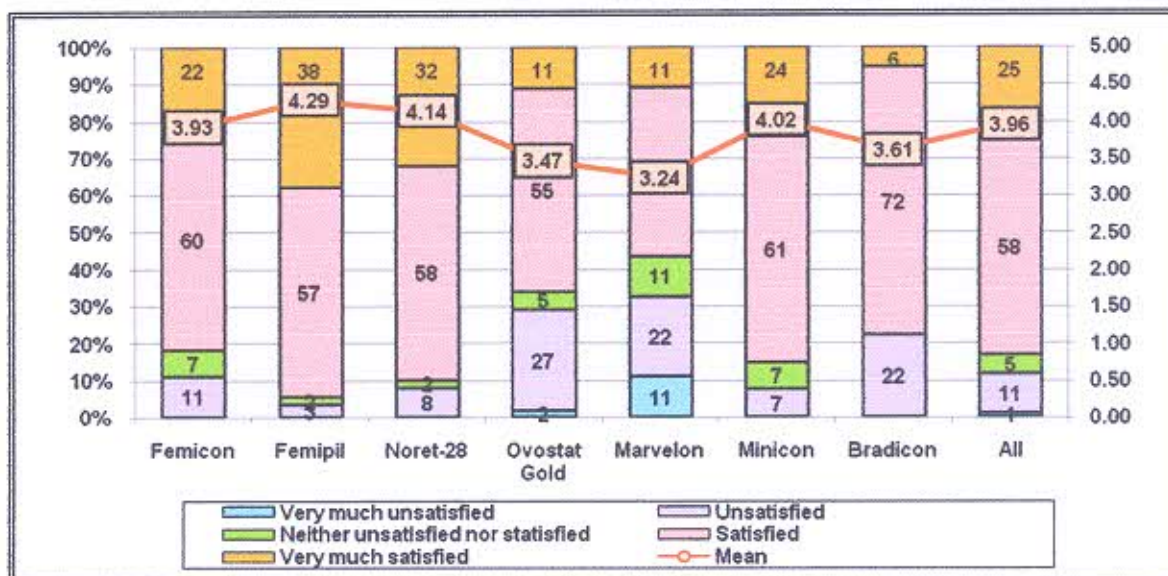
Satisfaction rating of current brand: All the brands obtained more than 4.00 on a 5 point scale, indicating that the users were quite satisfied with their respective current brand, and an overwhelming majority was either satisfied or very much satisfied with the brand.

However, when price was considered, satisfaction ratings went down for Femicon, Ovostat Gold, Marvelon and Bredicon significantly, indicating not very good value for money of these brands.

Graph – 2.2: Satisfaction rating of current brand (Q. 17a)



Graph – 2.3: Satisfaction rating of current brand with price in mind (Q. 18a)



Brand Loyalty: If own brand is not available in the usual place of purchase, mostly will search in another store. However, only a few opined to switch brand or method. Amongst those who will search in other stores, an overwhelming majority will continue searching till current brand is found, indicating a high level of brand loyalty for most of the brands. However, Marvelon users seemed most loyal, followed by Ovostat Gold and Minicon

Table – 2.9: What action will take if current brand not available in usual shop (Q23)

	Femicon	Femipil	Noret-28	Ovostat Gold	Marvelon	Minicon	Bredicon
Will search in different store	86.92	88.67	88.00	82.26	86.96	83.33	83.33
Will start using different Brand	5.52	5.91	6.00	6.45	4.35	11.11	5.56
Will start using different Methods	5.81	4.43	6.00	9.68	6.52	5.56	11.11
Will use nothing	1.74	0.99	0.00	1.61	2.17	0.00	0.00
Base - All Respondents	344	203	50	62	46	54	18

Table – 2.10: How many shops will search if brand not available (Q24)

	Femicon	Femipil	Noret-28	Ovostat Gold	Marvelon	Minicon	Bredicon
Start using different brand if not get after searching 1-5 s	13.38	12.78	13.64	7.84	2.50	4.44	33.33
Start using different brand if not get after searching 6-10	8.70	13.33	15.91	5.88	5.00	15.56	6.67
Start using different brand if not get after searching 11-20	4.35	5.56	6.82	7.84	5.00	4.44	13.33
Continue searching until current brand is found	73.58	68.33	63.64	78.43	87.50	75.56	46.67
Base - Those will search in different stores	299	180	44	51	40	45	15

2.5. Price Elasticity:

Market share of different brands at different price points – when price of all brands varies (increased): As can be seen from the following table and graphs, with the increase in price share of all the brands with the exception of Femipil declined, and some will desert from OCP. However, Femicon being the largest brand will lose most to Femipil, indicating a cannibalization of own brands. This would happen perhaps because in every price point price of Femipil was lowest among all the brands tested, offering best price option with increase in price that also offers good value for money with reasonably good product and brand image as discussed earlier. SMC may carry out a cost benefit analysis before taking a pricing decision. However, the good news is, OCP users appeared to be method loyal, and hence the market is not likely to shrink heavily with increase in price within a tolerable limit.

Table – 2.11: Price Elasticity (Q27 and 28)

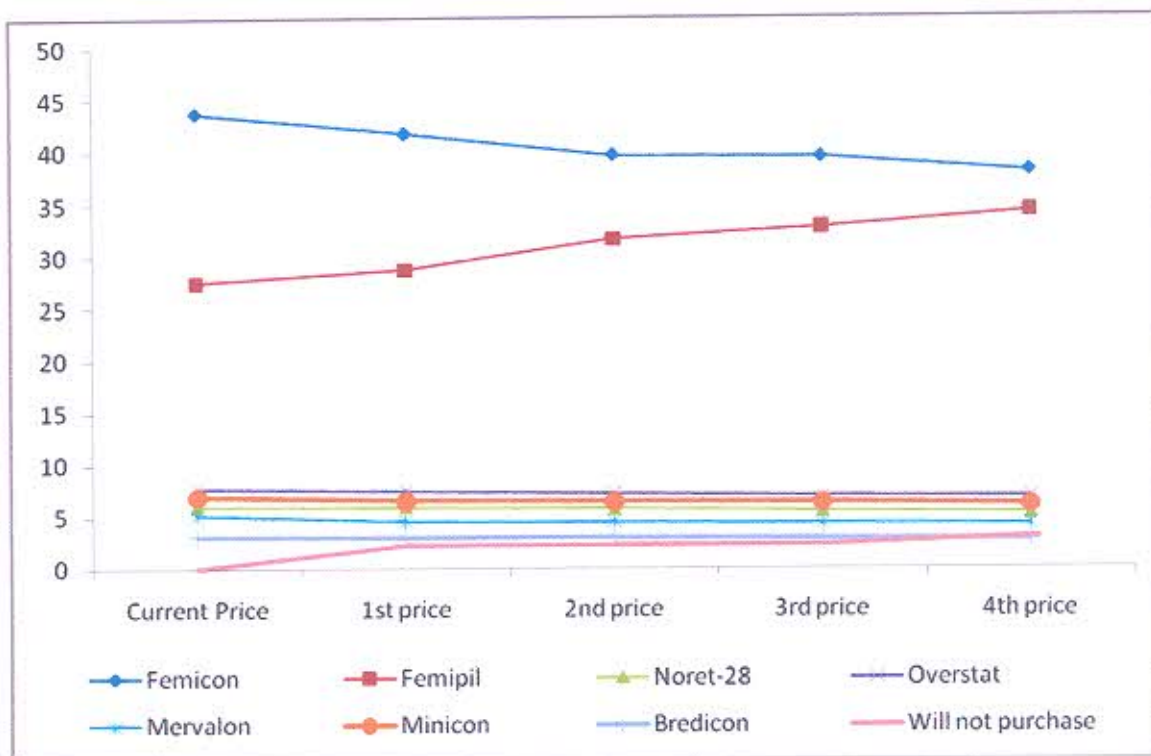
	At current Price	At 1st price point	At 2nd price point	At 3rd price point	At 4th price point
Femicon	43.70	41.7	39.6	39.4	38.0
Femipil	27.50	28.7	31.6	32.7	34.2
Noret-28	6.00	5.9	5.7	5.5	5.2
Overstat	7.70	7.5	7.2	6.9	6.8
Mervalon	5.10	4.5	4.4	4.2	4.1
Minicon	6.90	6.5	6.4	6.3	6.1
Bredicon	3.10	3.0	2.9	2.8	2.7
None	0.0	2.2	2.2	2.2	2.9

Base – All Respondent

Price Card_OCP User - Q.28.

		1st price point	2nd price point	3rd price point	4th price point
01	Femicon	30	35	40	45
02	Femipil	18	20	25	30
03	Noret-28	30	35	40	45
04	Overstat	55	60	65	70
05	Mervalon	105	115	125	135
06	Minicon	35	40	45	50
07	Bredicon	65	70	75	80
	None	999	999	999	999

Graph – 2.4: Brand Share at different price points



Graph – 2.5: Demand curve – Femicon



Graph – 2.6: Demand curve – Femipil

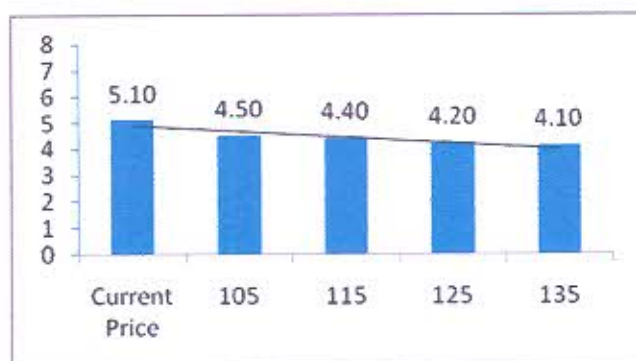


Graph – 2.7: Demand curve – Noret-28

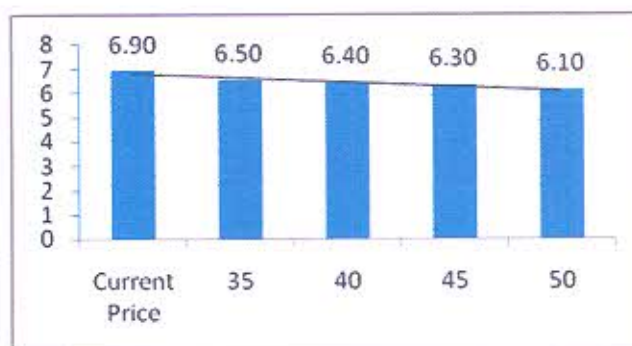


Graph – 2.8: Demand curve - Ovastat

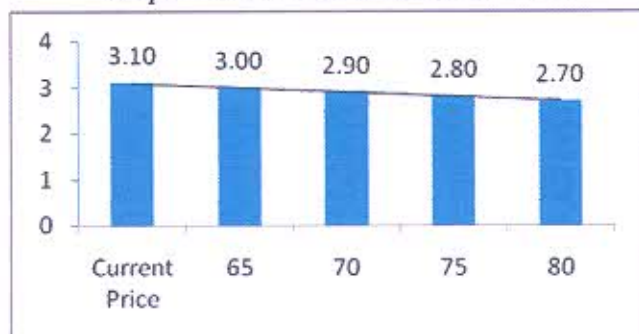
Graph – 2.9: Demand curve – Marvelon



Graph – 2.10: Demand Curve - Minicon



Graph – 2.11: Demand curve – Bredicon



Market share of SMC brands at different points when price of one brand varies (increased) and others remain constant:

Femicon: When price of only Femicon is changed upward, keeping prices of all other brands same at current level, its share declines significantly at each level as can be seen from the following table. The lead gainer is Femipil, followed by Minicon. Other brands also make marginal gains each.

Table – 2.12: Share of Different Brands When Price of Only Femicon is Changed

When Price of Only Femicon is Changed					
	Current price	First price change	2nd price change	3rd price change	4th price change
Femipil	27.5	29.7	31.9	34.0	35.9
Noret-28	6.0	6.5	7.0	7.5	7.9
Overstat	7.7	8.3	8.9	9.5	10.0
Mervalon	5.1	5.5	5.9	6.3	6.6
Minicon	6.9	7.5	8.0	8.5	9.0
Bredicon	3.1	3.4	3.6	3.9	4.1
None	0.0	0.2	0.2	0.1	0.2

Femipil: When price of only Femipil is changed upward, keeping prices of all other brands same at current level, its share declines marginally upto 2nd level, and then at a bit faster rate as can be seen from the following table. Femicon appears to gain somewhat more than the rest of the brands, all of which make very nominal gains each.

Table – 2.13: Share of Different Brands When Price of Only Femipil is Changed

When Price of Only Femipil is Changed					
	Current price	First price change	2nd price change	3rd price change	4th price change
Femicon	43.7	44.5	45.0	46.4	47.7
Noret-28	6.0	6.1	6.2	6.4	6.6
Overstat	7.7	7.8	7.9	8.2	8.4
Mervalon	5.1	5.2	5.2	5.4	5.5
Minicon	6.9	7.0	7.1	7.4	7.6
Bredicon	3.1	3.2	3.2	3.3	3.4
None	0.0	0.2	0.2	0.1	0.1

Noret - 28: When price of only Noret - 28 is changed upward, keeping prices of all other brands same at current level, its share declines constantly almost at the same pace, and others gain only marginally as the loss incurred by Noret – 28 is not much in volume due to being a small brand.

Table – 2.14: Share of Different Brands When Price of Only Noret - 28 is Changed

When Price of Only Noret – 28 is Changed					
	Current price	First price change	2nd price change	3rd price change	4th price change
	Current price	First price	2nd price	3rd price	4th price
Noret-28	6.0	5.2	5.2	5.0	5.0
Femicon	43.7	44.0	44.3	44.6	44.8
Femipil	27.5	27.7	27.9	28.1	28.2
Overstat	7.7	7.7	7.8	7.8	7.9
Mervalon	5.1	5.1	5.1	5.2	5.2
Minicon	6.9	7.0	7.0	7.1	7.1
Bredicon	3.1	3.2	3.2	3.2	3.2
None	0.0	0.1	0.2	0.0	0.2

Minicon: Minicon follows almost the same pattern as followed by Noret – 28 as can be seen from the following table.

Table – 2.15: Share of Different Brands When Price of Only Minicon is Changed

When Price of Only Minicon is Changed					
	Current price	First price change	2nd price change	3rd price change	4th price change
	Current price	First price	2nd price	3rd price	4th price
Minicon	6.9	6.9	6.9	6.9	6.9
Femicon	43.7	44.0	44.3	44.5	44.8
Femipil	27.5	27.7	27.9	28.0	28.2
Noret-28	6.0	6.1	6.1	6.2	6.2
Overstat	7.7	7.7	7.8	7.8	7.9
Mervalon	5.1	5.1	5.1	5.2	5.2
Bredicon	3.1	3.2	3.2	3.2	3.2
None	0.0	0.0	0.0	0.1	0.1

Intention to switch due to price hike of currently used brand: An overwhelming majority would switch to another brand, meaning they would remain in OCP, a large segment would switch method, and a few would drop out of FP method. A large segment, irrespective of brand, would either consult with spouse or doctor before switching brand. However, Femicon appears to be the most desired brand option, followed by Femipil (especially amongst Femicon users). Amongst those who would switch method, most favored method would be Condom, followed by injection.

Table – 2.16: Intended action due to price hike of currently used brand (Q30a)

	Figures in percentage						
	Femicon	Femipil	Noret-28	Ovostat Gold	Marvelon	Minicon	Bredicon
Will use different brand	65.98	76.26	67.35	68.33	71.74	78.85	76.47
Will use different method	27.51	19.19	24.49	23.33	21.74	19.23	17.65
Will use nothing	6.51	4.55	8.16	8.33	6.52	1.92	5.88
Base – Those will use pill	338	198	49	60	46	52	17

Table – 2.17: Brand intended to switch to due to price hike of currently used brand Q30b

Give total figure only

	Figures in percentage							
	Femicon	Femipil	Noret-28	Ovostat Gold	Marvelon	Minicon	Bredicon	Total
Femicon	0.00	49.67	42.42	19.51	15.15	34.15	15.38	?
Femipil	25.11	0.00	0.00	7.32	0.00	7.32	0.00	?
Noret-28	8.52	4.64	0.00	12.20	3.03	4.88	0.00	?
Ovostat Gold	3.59	1.32	12.12	0.00	18.18	2.44	7.69	?
Marvelon	1.79	1.32	12.12	14.63	0.00	4.88	0.00	?
Minicon	4.93	1.32	3.03	0.00	0.00	0.00	0.00	?
Bredicon	0.00	0.00	0.00	0.00	3.03	0.00	0.00	?
Shukhi	9.87	10.60	3.03	0.00	0.00	4.88	0.00	?
Nordette-28	1.35	0.66	3.03	4.88	3.03	0.00	0.00	?
Dracon	0.00	0.66	0.00	2.44	0.00	0.00	0.00	?
Under advice of health worker	0.00	2.65	0.00	0.00	0.00	0.00	0.00	?
Shall buy brand in consultation with pharmacy people	1.35	0.66	0.00	2.44	0.00	0.00	0.00	?
Shall buy in consultation with husband	18.83	6.62	9.09	17.07	9.09	12.20	7.69	?
Shall buy in consultation with neighbor	1.35	0.00	0.00	0.00	0.00	0.00	0.00	?
Shall buy in consultation with doctor	20.18	17.88	15.15	17.07	48.48	29.27	69.23	?
Don't know	3.14	1.99	0.00	2.44	0.00	0.00	0.00	?
Base - Those will use different brand	223	151	33	41	33	41	13	?

Table – 2.18: Method intended to switch to due to price hike of currently used brand (Q30c)

	Figures in percentage							
	Femicon	Femipil	Noret-28	Ovostat Gold	Marvelon	Minicon	Bredicon	All
Condom	46.24	28.95	50.00	78.57	60.00	10.00	33.33	43.89
Injection	27.96	31.58	16.67	7.14	20.00	40.00	0.00	26.11
Norplant	0.00	0.00	8.33	0.00	0.00	10.00	33.33	1.67
IUD	3.23	0.00	0.00	0.00	0.00	0.00	0.00	1.67
Vasectomy (male sterilization)	2.15	0.00	0.00	0.00	10.00	0.00	0.00	1.67
Withdrawal/ Azal	4.30	5.26	8.33	7.14	0.00	20.00	0.00	5.56
Safe period	12.90	23.68	8.33	0.00	0.00	20.00	0.00	13.33
Shall buy in consultation with husband	2.15	2.63	8.33	0.00	0.00	0.00	0.00	2.22
Shall buy in consultation with doctor	1.08	7.89	0.00	7.14	10.00	0.00	33.33	3.89
Base - Those will use different methods	93	38	12	14	10	10	3	180

2.6. Price of Implant:

Spontaneously, most favored price option was BDT 500 or less including doctors' visit, opined by two-thirds of respondents. Around one-fourth opted for BDT 500 – 1000. Only a few opined for more than BDT 1000. While reacting to a price of BDT 1000 including doctors' visit, little more than 60% thought it will fare well or very well. However, a large segment (36%) thought otherwise.

Table – 2.19: Price mentioned spontaneously Q.31.

	Figures in percentage		
	Urban	Rural	All
Below taka 500.00	39.14	48.29	43.63
Taka 500.00	21.72	23.36	22.52
Taka 501.00-1000.00	32.32	22.83	27.67
More than taka 1000.00	6.82	5.51	6.18
Base - All Respondents	396	381	777

Table – 2.20: Reaction to price at BDT 1000 including doctors' fee (Q.32)

	Figures in percentage		
	Urban	Rural	All
Will fare very well	13.89	12.34	13.13
Will fare well	57.58	43.57	50.71
Will not fare	28.54	44.09	36.16
Base - All Respondents	396	381	777

Table – 2.21: Household Profile

Figures in percentage

		Femicon	Femipil	Noret-28	Ovostat Gold	Marvelon	Minicon	Bredicon	All
Occupation of Head of Household	Unskilled labour	14.53	20.20	0.00	3.23	2.17	11.11	11.11	13.13
	Skilled labour	15.99	23.65	16.00	11.29	4.35	24.07	11.11	17.37
	Small businessman	12.50	10.84	8.00	3.23	6.52	12.96	5.56	10.55
	Shop owner	7.27	5.91	8.00	9.68	6.52	7.41	11.11	7.21
	Business/Industrialist but does not employ labor	8.72	8.37	10.00	8.06	15.22	9.26	22.22	9.40
	Business/industrialist employing 1 to 9 more employees	7.27	4.43	12.00	12.90	28.26	7.41	5.56	8.49
	Business/Industrialist employing 10 or more employees	1.74	0.00	2.00	4.84	2.17	0.00	0.00	1.42
	Self employed	0.00	0.00	2.00	1.61	0.00	0.00	0.00	0.26
	Clerk/Salesman	7.27	6.90	10.00	12.90	6.52	7.41	5.56	7.72
	Employed in supervisory position	3.20	2.96	6.00	4.84	6.52	3.70	16.67	3.99
	Junior Officer/Executive	2.91	0.00	2.00	3.23	4.35	5.56	0.00	2.32
	Senior/mid level officer/Executive	2.62	2.46	12.00	4.84	6.52	1.85	5.56	3.60
	Farmer	9.30	9.36	0.00	6.45	2.17	7.41	0.00	7.72
	Teacher/Imam	2.62	1.48	0.00	6.45	0.00	0.00	0.00	2.06
	Police/Ansar/Traffic	1.45	1.48	2.00	4.84	2.17	0.00	0.00	1.67
	Village doctor	0.00	1.48	2.00	0.00	0.00	0.00	0.00	0.51
	Peon/Postman	0.58	0.00	0.00	0.00	0.00	0.00	0.00	0.26
	Foreign service	1.16	0.00	4.00	0.00	4.35	0.00	5.56	1.16
	Unemployed	0.58	0.49	2.00	0.00	2.17	1.85	0.00	0.77
	Professor	0.29	0.00	0.00	0.00	0.00	0.00	0.00	0.13
	Journalist	0.00	0.00	2.00	0.00	0.00	0.00	0.00	0.13
	Retired	0.00	0.00	0.00	1.61	0.00	0.00	0.00	0.13
Education of Head of Household	Illiterate	11.34	17.24	0.00	0.00	2.17	12.96	11.11	10.81
	Literate but no formal schooling	2.33	1.48	0.00	0.00	0.00	0.00	0.00	1.42
	Up to class 4	9.01	8.37	0.00	1.61	0.00	5.56	0.00	6.69
	Class 5 to class 9	42.15	48.28	40.00	32.26	32.61	53.70	38.89	42.99
	SSC/HSC	25.29	17.73	34.00	41.94	39.13	16.67	33.33	25.61
	Some college education/Diploma holder but not graduate	0.29	0.49	2.00	1.61	2.17	1.85	0.00	0.77
	Graduate or above (general)	8.14	5.91	18.00	16.13	21.74	7.41	16.67	9.78
	Graduate and above (professional)	1.45	0.49	6.00	6.45	2.17	1.85	0.00	1.93
SEC	Sec A	5.52	1.48	14.00	12.90	21.74	5.56	5.56	6.56
	Sec B	6.69	2.46	20.00	11.29	15.22	1.85	16.67	7.21
	Sec C	43.31	40.39	44.00	59.68	52.17	42.59	50.00	44.53
	Sec D	41.86	50.74	22.00	16.13	10.87	50.00	27.78	39.25
	Sec E	2.62	4.93	0.00	0.00	0.00	0.00	0.00	2.45
	Base - All Respondents	344	203	50	62	46	54	18	777

3. Detailed Findings on ECP:

3.1. Awareness and Usage:

Norpil users seem to be aware of their current brand of ECP only. On the other hand some users of Imcon also know about Norpil, as awareness of Norpil is higher than its usage. However, of the total ECP users about two-thirds use Imcon and the rest one-third use Norpil.

Table – 3.1: Awareness and Usage of Selected Brands (Q.6)

	Total Awareness			Current Usage		
	Urban	Rural	All	Urban	Rural	All
Norpil	48.89	40.00	48.00	31.11	40.00	32.00
Imcon	68.89	60.00	68.00	68.89	60.00	68.00
Femicon	100.00	100.00	100.00	Not Asked	Not Asked	Not Asked
Femipil	53.33	60.00	54.00	Not Asked	Not Asked	Not Asked
Noret-28	26.67	40.00	28.00	Not Asked	Not Asked	Not Asked
Ovostat Gold	60.00	80.00	62.00	Not Asked	Not Asked	Not Asked
Marvelon	64.44	100.00	68.00	Not Asked	Not Asked	Not Asked
Minicon	71.11	80.00	72.00	Not Asked	Not Asked	Not Asked
Bredicon	11.11	0.00	10.00	Not Asked	Not Asked	Not Asked
Base - All Respondents	45	5	50	45	5	50

3.2. Attribute rating of different brands on 5 point agreement – disagreement scale:

Both the brands of ECP received more or less good product and image rating as positives are reasonably high and negatives low. However, neither of the brands was found well aware of.

Table – 3.2: Attribute rating of different brands on 5 point scale (Q.7 and 8)

	Mean score on 5 point scale								
	Femicon	Femipil	Noret-28	Ovostat Gold	Marvelon	Minicon	Bredicon	Norpil	Imcon
Product Attributes									
A well known brand	4.60	4.19	4.21	4.21	4.03	4.33	2.60	3.28	3.33
Modern brand	3.08	2.85	4.36	3.64	4.24	3.47	4.60	4.88	4.64
High quality brand	3.44	3.69	4.50	4.39	4.62	3.78	4.20	4.64	4.50
Local quality brand	4.37	4.12	4.23	3.66	3.91	4.24	4.00	4.17	3.94
International quality Brand	2.83	2.42	3.54	3.87	4.22	2.67	3.80	3.65	3.74
Low quality brand	2.58	2.19	1.85	1.81	1.67	2.51	1.80	1.52	1.58
High price	2.07	1.83	2.73	3.97	3.88	2.77	3.40	3.24	3.89
Good value of money	4.03	3.82	3.91	4.12	4.19	4.04	4.60	4.08	4.39
Less price	4.09	4.16	3.27	2.17	2.25	3.39	3.60	2.84	2.25
Antiquated brand	3.32	3.32	2.00	2.61	2.27	2.54	1.60	1.54	1.89
Easily available	4.66	4.44	4.08	4.37	4.21	4.26	3.40	3.67	3.94
Image Attributes:									
Low dosage	4.08	4.04	4.08	3.73	3.58	3.94	2.60	3.23	2.81
High dosage	1.96	1.77	2.08	2.43	2.42	2.12	3.40	2.82	3.38
Less side effect	3.47	3.79	3.70	3.62	3.93	3.77	4.60	4.23	3.68
High side effect	2.44	2.17	2.30	2.41	2.29	2.32	1.40	1.91	2.38
Very effective	3.79	3.86	4.20	4.11	4.14	3.81	4.50	4.55	4.27
Less effective	2.17	2.14	1.80	2.00	2.03	2.13	1.25	1.23	1.92
Adjust well	4.06	3.86	4.11	3.54	3.79	4.13	4.00	4.36	4.22
Base – Those aware	50	27	14	31	34	36	5	24	34

3.3. Buying pattern:

The most frequency of buying ECP is “As and when required”, mentioned by about 60% ECP users, followed by “Less than once in two months” (30%). Everybody buys one doze at a time. The most common place of purchase is Pharmacy, mentioned by about 90% respondents. About 9% in urban also buy from Clinic/Hospital.

Table – 3.3: Frequency of Buying (Q.9)

	Urban	Rural	All
Once in a month	6.67	0.00	6.00
Once in two months	2.22	0.00	2.00
Less than once in two months	26.67	60.00	30.00
As and when required	64.44	40.00	62.00
Base - All Respondents	45	5	50

Table – 3.4: Place of Buying (Q.11)

	Urban	Rural	All
Pharmacy	91.11	100.00	92.00
Clinic/Hospital	8.89	0.00	8.00
Base - All Respondents	45	5	50

3.4. Opinion on current brand:

Reasons for using current brand and likes noticed: ‘Its efficacy is good’ was the most mentioned reason for using the respective current brand and likes noticed. Other major reasons and likes noticed were ‘Adjusted with body’, ‘Doesn't have nausea effect’, ‘No side effect’, ‘No vertigo occurs’ and ‘Easily available’

Table – 3.5: Reasons for using current brand (Q.12)

	Norpil	Imcon	All
Adjusted with body	31.25	23.53	26.00
With doctor's advice	12.50	29.41	24.00
Its efficacy is good	43.75	41.18	42.00
It is a good brand	18.75	17.65	18.00
Easily available	6.25	23.53	18.00
No side effect	6.25	11.76	10.00
Doesn't have nausea effect	12.50	2.94	6.00
Low doze pill	0.00	8.82	6.00
No headache	6.25	5.88	6.00
It's price is less	0.00	8.82	6.00
Take this with advice of relatives/neighbors	6.25	2.94	4.00
Base - All Respondents	16	34	50

Table – 3.6: Likes noticed of current brand Q.14

Figures in percentage

	Norpil	Imcon	All
Its efficacy is good	50.00	67.65	62.00
It adjusted with body	18.75	23.53	22.00
Doesn't have nausea effect	31.25	17.65	22.00
No side effect	18.75	20.59	20.00
No vertigo occurs with this pill	25.00	17.65	20.00
Easily available	0.00	20.59	14.00
After taking it don't feel weak	6.25	8.82	8.00
It's price is less	0.00	8.82	6.00
Base - All Respondents	16	34	50

Dislikes noticed: About 21% of Imcon and 13% Norpil users found some dislikes of their respective current brands. High price, feel weak, nausea, etc were mentioned as the dislikes (the base number is small though)

Graph – 3.1: Notice-ability of dislikes of current brand (Q. 15)

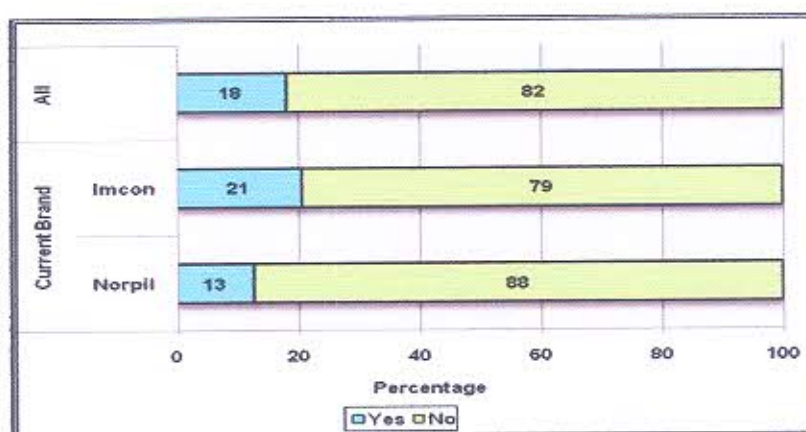


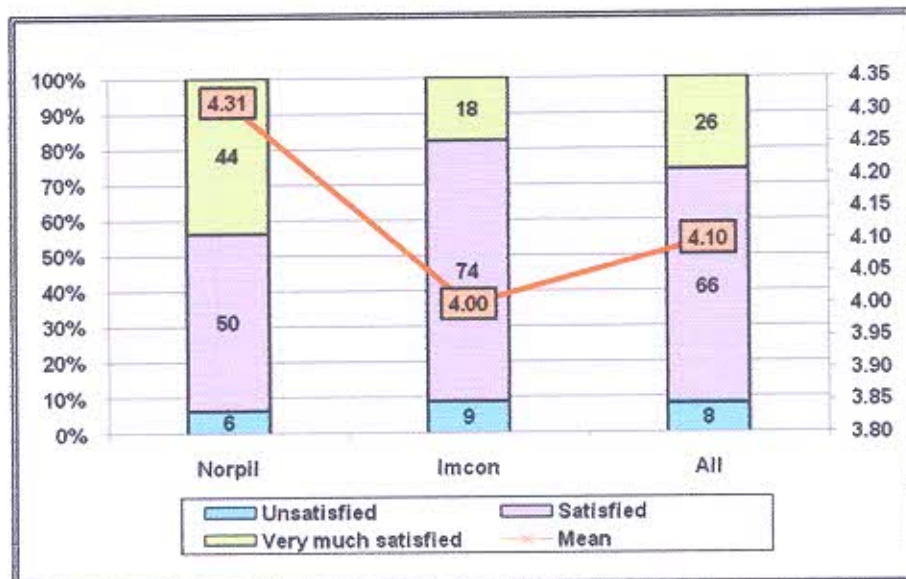
Table – 3.7: Dislikes noticed of current brand (Q16)

Figures in percentage

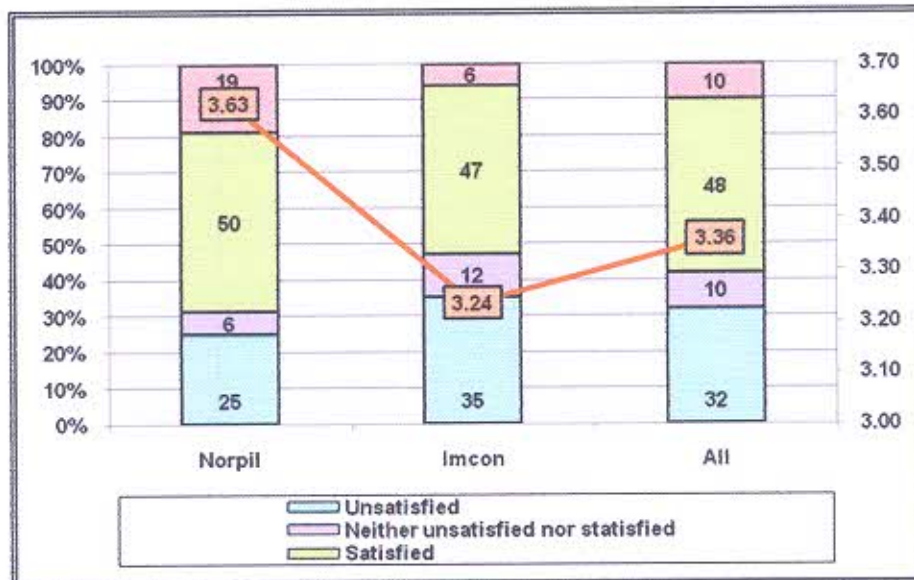
	Norpil	Imcon	All
Price is high	50.00	14.29	22.22
Feel weak	0.00	28.57	22.22
Nausea feeling	0.00	28.57	22.22
Vertigo occurs	0.00	28.57	22.22
Abdomen pain used take place	50.00	0.00	11.11
Irregular menstruation happened	0.00	42.86	33.33
Excessive bleeding would occur during menstruation	0.00	14.29	11.11
This is a high powered pill	0.00	14.29	11.11
Base - Those express dislike	2	7	9

Satisfaction rating of current brand: Like OCP, both the brands obtained 4.00 or more on a 5 point scale, indicating that the users were quite satisfied with their respective current brand, and an overwhelming majority was either satisfied or very much satisfied with the brand. However, when price was considered, satisfaction ratings went down for both significantly.

Graph – 3.2: Satisfaction rating of current brand (Q. 17a)



Graph – 3.3: Satisfaction rating of current brand with price in mind (Q. 18a)



Brand loyalty: If own brand is not available in the usual place of purchase, mostly will search in another store. However, only a few opined to switch brand or method. Amongst those who will search in other stores, an overwhelming majority will continue searching till current brand is found, indicating a high level of brand loyalty for most of the brands. However, Imcon users seemed more loyal than Norpil users.

Table – 3.8: What action will take if current brand not available in usual shop (Q23)

	Figures in percentage		
	Norpil	Imcon	All
Will search in different store	75.00	82.35	80.00
Will start using different brand	0.00	2.94	2.00
Will start using different methods	18.75	11.76	14.00
Will use nothing	6.25	2.94	4.00
Base - All Respondents	16	34	50

Table – 3.9: How many shops will search if brand not available (Q24)

	Figures in percentage		
	Norpil	Imcon	All
Start using different brand if not get after searching 1-5	25.00	3.57	10.00
Start using different brand if not get after searching 6-10	8.33	17.86	15.00
Start using different brand if not get after searching 11-20	0.00	3.57	2.50
Continue searching until current brand is found	66.67	75.00	72.50
Base – Those will search in different stores	12	28	40

3.5. Price Elasticity:

Market share of different brands at different price points: As can be seen from the following table and graphs, hardly any brand switch will take place with increase in price. However, some dropouts from the method are likely to take place.

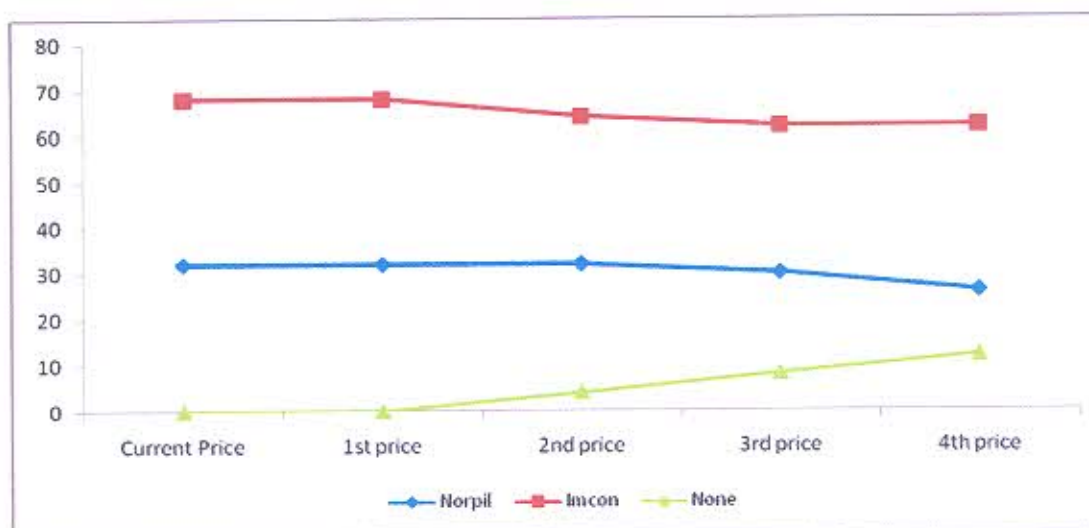
Table – 3.10: Price Elasticity (Q27 and 28)

	At 1st price point	At 2nd price point	At 3rd price point	At 4th price point
Norpil	32.00	32.00	30.00	26.00
Imcon	68.00	64.00	62.00	62.00
None	0.00	4.00	8.00	12.00

Card_ECP User - Q.28

		1st price	2nd price	3rd price	4th price
01	Norpil	30	35	40	45
02	Imcon	65	70	75	80
	None	999	999	999	999

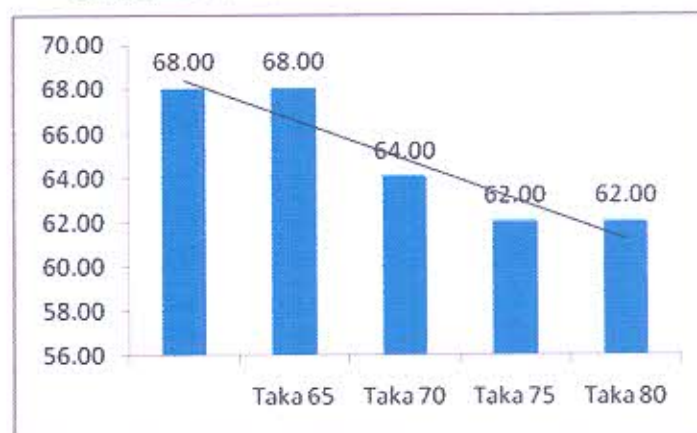
Graph – 3: Brand Share at different price points



Graph – 3.5: Demand curve - Norpil



Graph – 3.6: Demand curve -Imcon



Intention to switch due to price hike of currently used brand: More than 60% of Norpil and about half of Imcon would switch method if price of currently is hiked, most of the rest will switch brand, and some may dropout of FP method. No Norpil users mentioned any brand to switch, while some Imcon users mentioned Norpil, Impil and Postinor as the brand to switch. However, majority would consult doctor/ spouse or pharmacy before switching. Among other method, majority would switch to Condom, and some to OCP.

Table – 3.11: Intended action due to price hike of currently used brand (Q30a)

Figures in percentage

	Norpil	Imcon	All
Will use different brand	31.25	44.12	40.00
Will use different method	62.50	47.06	52.00
Will not use anything	6.25	8.82	8.00
Base - Those will use pill	16	34	50

Table – 3.12: Brand intended to switch to due to price hike of currently used brand Q30b
Figures in percentage

	Norpil	Imcon	All
Norpil	0.00	20.00	15.00
Ipill	0.00	6.67	5.00
Postinor	0.00	6.67	5.00
Raja/Nirapod(Government)	0.00	6.67	5.00
Shall buy brand in consultation with pharmacy people	40.00	0.00	10.00
Shall buy in consultation with husband	20.00	0.00	5.00
Don't know that any other brand available	20.00	13.33	15.00
Shall buy in consultation with doctor	20.00	46.67	40.00
Base - Those will use different brand	5	15	20

Table – 3.13: Method intended to switch to due to price hike of currently used brand (Q30c)
Figures in percentage

	Norpil	Imcon	All
Oral pill	10.00	6.25	7.69
Condom	30.00	75.00	57.69
Injection	30.00	6.25	15.38
Safe period	30.00	6.25	15.38
Shall buy in consultation with husband	0.00	6.25	3.85
Base - Those will use different methods	10	16	26

3.6. Price of Implant:

Spontaneously, most favored price option was BDT 500 or less including doctors' visit, opined by two-thirds of respondents. Around one-fourth opted for BDT 500 – 1000. Only a few opined for more than BDT 1000. While reacting to a price of BDT 1000 including doctors' visit, about 70% thought it will fare well or very well. However, a large segment (30%) thought otherwise.

Table – 3.14: Price mentioned spontaneously Q.31.

	Area		All
	Urban	Rural	
Less than taka 500	24.43	0.00	22.00
Taka 500	33.33	60.00	36.00
Taka 500-1000	28.89	40.00	30.00
More than taka 1000	13.33	0.00	12.00
Base - All Respondents	45	5	50

Table – 3.15: Reaction to price at BDT 1000 including doctors' fee (Q.32)

	Area		All
	Urban	Rural	
Will fare very well	17.78	0.00	16.00
Will fare well	51.11	80.00	54.00
<i>Will not fare</i>	31.11	20.00	30.00
Base - All Respondents	45	5	50

Profile of Household

Figures in percentage

		Norpil	Imcon	All
Occupation of Head of household	Unskilled labour	18.75	0.00	6.00
	Skilled labour	6.25	5.88	6.00
	Small businessman	6.25	5.88	6.00
	Shop owner	0.00	5.88	4.00
	Business/Industrialist but does not employ labor	12.50	20.59	18.00
	Business/industrialist employing 1 to 9 more employees	12.50	8.82	10.00
	Business/Industrialist employing 10 or more employees	6.25	0.00	2.00
	Clerk/Salesman	12.50	2.94	6.00
	Employed in supervisory position	18.75	5.88	10.00
	Junior Officer/Executive	0.00	8.82	6.00
	Senior/mid level officer/Executive	6.25	20.59	16.00
	Teacher/Imam/Muajjin	0.00	5.88	4.00
	Police/Ansar/Traffic	0.00	2.94	2.00
	Village doctor	0.00	2.94	2.00
	Retired	0.00	2.94	2.00
Education of Head of household	Illiterate	12.50	2.94	6.00
	Class 5 to class 9	18.75	2.94	8.00
	SSC/HHC	25.00	44.12	38.00
	Some college education/Diploma holder but not graduate	0.00	2.94	2.00
	Graduate or above (general)	37.50	35.29	36.00
	Graduate and above (professional)	6.25	11.76	10.00
SEC of Head of household	Sec A	31.25	23.53	26.00
	Sec B	12.50	26.47	22.00
	Sec C	56.25	35.29	42.00
	Sec D	0.00	14.71	10.00
	Base - All Respondents	16	34	50

4. Findings on SDK:

4.1. Awareness and Usage:

Awareness and usage of SDK seem identical, meaning a user only knows about her own brand. However, Safety Kit is the most used brand used by 84% of the respondents, and rest use Kallyani.

Table – 4.1: Awareness and Usage of Selected Brands (Q.6)

	Awareness			Current Usage		
	Urban	Rural	All	Urban	Rural	All
Safety kit	84.62	84.78	84.76	84.62	84.06	84.15
Kallayani	15.38	18.12	17.68	15.38	15.94	15.85
Base - All Respondent	26	138	164	26	138	164

4.2. Attribute rating of different brands on 5 point agreement – disagreement scale:

Both product and image rating of both the brands were very good and both received high scores on positives and low on negatives.

Table – 4.2: Attribute rating of different brands on 5 point scale (Q.7 and 8)

	Mean score on 5 point scale	
	Safety kit	Kallayani
Product Attributes:		
A well known brand	4.09	4.21
Modern brand	4.33	4.31
High quality brand	4.55	4.45
Local quality brand	4.32	4.41
International quality Brand	2.97	2.96
Low quality brand	1.58	1.72
High price	2.19	1.93
Good value of money	4.33	4.31
Less price	3.84	4.17
Easily available'	4.38	4.24
Image Attributes:		
Easily use	4.63	4.83
Not Easily use	1.48	1.55
Safe	4.63	4.86
Not safe	1.47	1.45
Base - Those aware	138	26

4.3. Buying pattern:

Most of the respondents, nearly 90% used SDK only once so far. The most common place of purchase was Pharmacy (35%), followed by Health worker (29% - more in rural) and Doctor (21% - more in rural). In urban areas Blue-star clinic and Clinic/Hospital are also common as can be seen from Table 4.4 below.

Table – 4.3: Number of Times Used SDK So far (Q.10)

	Urban	Rural	All
One time	88.46	87.68	87.80
Two times	11.54	9.42	9.76
Three times	0.00	2.17	1.83
Four times	0.00	0.72	0.61
Base - All Respondents	26	138	164

Table – 4.4: Place of Procurement (Q.11)

	Urban	Rural	All
Pharmacy	38.46	34.06	34.76
Blue-star pharmacy	15.38	1.45	3.66
Clinic/Hospital	15.38	6.52	7.93
Doctor	7.69	23.91	21.34
Health worker	19.23	30.43	28.66
From midwife	3.85	3.62	3.66
Base - All Respondents	26	138	164

4.4. Opinion on current brand:

Reasons for using current brand and likes noticed: Both reasons and likes are more or less same which were 'Due to sterilized items no infection takes place', 'Items of this brand remains sterilizes' and 'It is a good brand'. However, doctors' advice was also mentioned as a reason for using the brand.

Table – 4.5: Reasons for using current brand (Q.12)

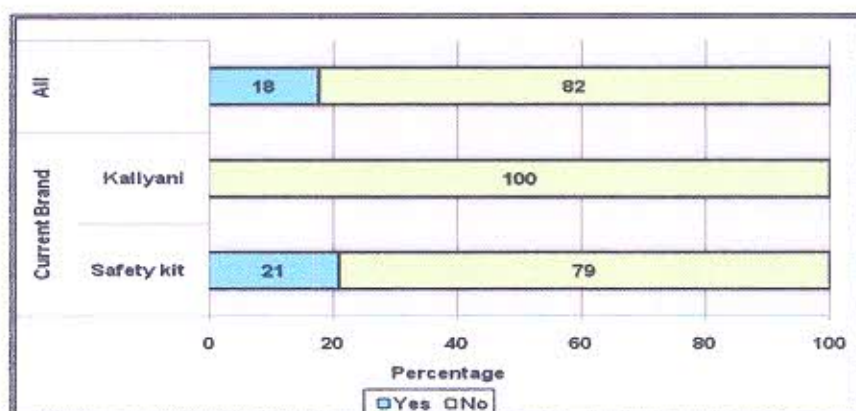
	Figures in percentage		
	Safety kit	Kallayani	All
Due to sterilized items no infection takes place	36.96	26.92	35.37
Items of this brand remains sterilizes	33.33	34.62	33.54
With doctor's advice	29.71	3.85	25.61
Easily available	17.39	23.08	18.29
Use this as I don't know name of any other brand	11.59	34.62	15.24
It is a good brand	18.12	0.00	15.24
With advice of health worker	8.70	30.77	12.20
Low price	2.90	42.31	9.15
With advice of midwife	10.14	0.00	8.54
All delivery items/kits are available together	5.80	11.54	6.71
Base - All Respondents	138	26	164

Table – 4.6: Likes noticed of current brand Q.14

Figures in percentage

	Current Brand		All
	Safety kit	Kallayani	
Items of this brand remains sterilizes	38.41	53.85	40.85
Due to sterilized items no infection takes place	33.33	57.69	37.20
All delivery items/kits are available together	28.99	34.62	29.88
It is a good brand	12.32	0.00	10.37
Easily available	9.42	7.69	9.15
Clip inside the kit box was of improved quality	9.42	0.00	7.93
Liked the soap inside kit box	7.25	3.85	6.71
Low price	1.45	30.77	6.10
Blade's design was new and easy to hold	7.25	0.00	6.10
Base - All Respondents	138	26	164

Dislikes noticed: None of Kallayani noticed any dislike, while 21% of Safety Kit noticed some. Most mentioned dislike of safety Kit was 'No rexin or 'wall-cloth' inside the kit box'. Other major ones were 'No germicide like Dettol/Savlon inside the kit box' and 'No gloves inside the kit box'.

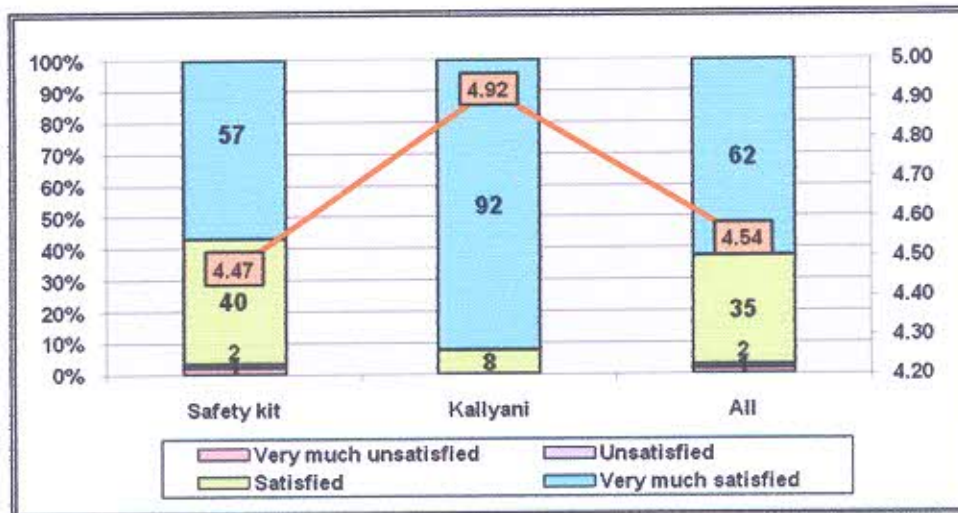
Graph – 4.1: Notice-ability of dislikes f current brand (Q. 15)**Table – 4.7: Dislikes noticed of current brand (Q16)**

Figures in percentage

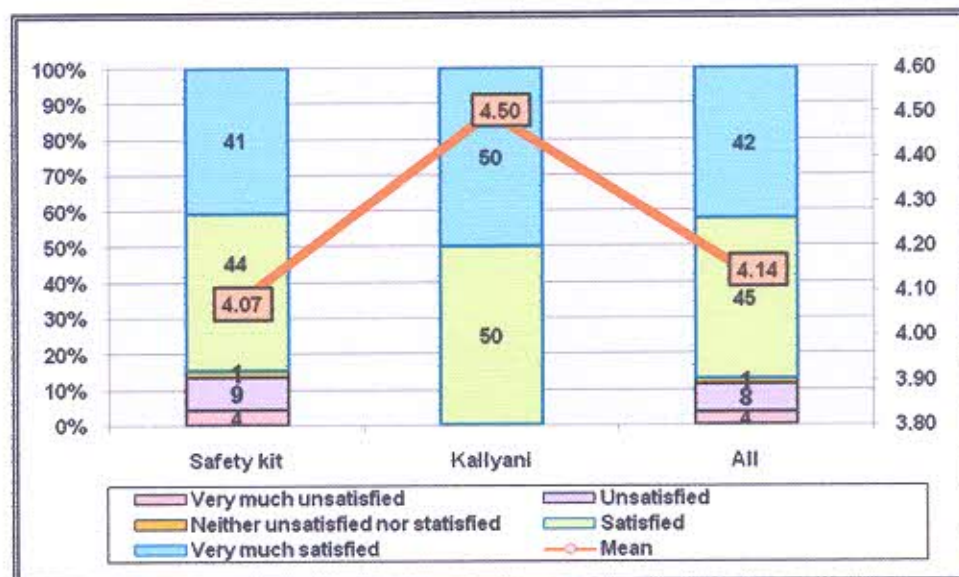
	Current Brand
	Safety kit
No germicide like dettol/ savlon inside the kit box	27.59
High price	6.90
No gloves inside the kit box	17.24
Amount of cotton was low inside the kit box	3.45
Items inside the kit box were of low quality	3.45
No rexin or 'wall-cloth' inside the kit box	55.17
Less amount of plain cloth inside the kit box	3.45
No dress for the new born baby inside the kit box	3.45
Base - Those express dislike	29

Satisfaction rating of current brand: Satisfaction was high for both the brands with or without price, and much higher for Kallyani compared to Safety Kit as can be seen from the following graphs.

Graph – 4.2: Satisfaction rating of current brand (Q. 17a)



Graph – 4.3: Satisfaction rating of current brand with price in mind (Q. 18a)



Brand loyalty: If own brand is not available in the usual place of purchase, mostly will search in another store. However, only a few opined to switch brand, and some will use other method. Amongst those who will search in other stores, an overwhelming majority of Kallyani (80%) and 51% Safety Kit will continue searching till current brand is found, indicating a high level of brand loyalty Kallyani than Safety Kit.

Table – 4.8: What action will take if current brand not available in usual shop (Q23)

	Figures in percentage		
	Safety kit	Kallayani	All
Will search in different store	72.46	76.92	73.17
Will start using different brand	11.59	7.69	10.98
Will start using different methods	15.94	15.38	15.85
Base - All Respondents	138	26	164

Table – 4.9: How many shops will search if brand not available (Q24)

	Figures in percentage		
	Safety kit	Kallayani	All
Start using different brand if not get after searching 1-5 shops	36.00	10.00	31.67
Start using different brand if not get after searching 6-10 shops	5.00	0.00	4.17
Start using different brand if not get after searching 11-20 shops	8.00	10.00	8.33
Continue searching until current brand is found	51.00	80.00	55.83
Base - Those will search in different stores	100	20	120

4.5. Price Elasticity:

Market share of different brands at different price points: While Kallyani would hardly lose any share with increase in price, share of Safety Kit would erode, who would dropout of the method as can be seen from the following table and graphs.

Table – 4.10: Price Elasticity (Q27 and 28)

	At current Price	At 1st price point	At 2nd price point	At 3rd Price point	At 4th price point
Safety kit	84.15	81.71	79.27	71.34	70.12
Kallayani	15.85	15.85	15.85	14.63	14.63
None	0.00	2.44	4.88	14.02	15.24

Card_ SDK User - Q.28.

		1st price	2nd price	3rd price	4th price
1	Safety kit	65	70	75	80
2	Kallayani	40	45	50	55
	None	99	99	99	99

Graph – 4.4: Brand share at different price points



Graph – 4.5: Demand curve – Safety Kit



Graph – 4.6: Demand curve - Kallayani



Intention to switch due to price hike of currently used brand: Almost about 40% will not use anything if stops using current brand due to price hike, and the rest 60% will use a different brand. Amongst those who will switch brand, mostly will consult either husband (60%) or doctor (20%) before selecting a brand and a notable segment (15%) did not know. A few would switch between Kit Kt and Kallayani.

Table – 4.11: Intended action due to price hike of currently used brand (Q30a)

	Safety kit	Kallayani	All
Will use different brand	60.74	61.54	60.87
Will not use anything	39.26	38.46	39.13
Base	134	26	160

Table – 4.12: Brand intended to switch to due to price hike of currently used brand Q30b

Figures in percentage

	Safety kit	Kallayani	All
Safety kit	0.00	6.25	1.02
Kallayani	3.66	0.00	3.06
With doctor's advice	21.95	12.50	20.41
With pharmacy people's advice	1.22	0.00	1.02
In consultation with husband	60.98	25.00	55.10
On advice of health worker	0.00	12.50	2.04
On advice of midwife	2.44	0.00	2.04
Do not know	9.76	43.75	15.31
Base	81	16	97

4.6. Price of Implant:

Spontaneously, mostly favored price option was BDT 500 or less including doctors' visit, opined by two-thirds of respondents. Around one-fifth opted for BDT 500 – 1000. Only a few opined for more than BDT 1000. While reacting to a price of BDT 1000 including doctors' visit, about half thought it will fare well or very well. However, a large segment, nearly half thought otherwise.

Table – 4.13: Price mentioned spontaneously Q.31.

Figures in percentage

	Area		All
	Urban	Rural	
Less than 500 taka	61.54	57.97	58.54
Taka 500	23.08	16.67	17.68
Taka 501-1000	15.38	22.46	21.34
More than taka 1000	0.00	2.90	2.44
Base - All Respondents	26	138	164

Table – 4.14: Reaction to price at BDT 1000 including doctors' fee (Q.32)

Figures in percentage

	Area		All
	Urban	Rural	
Will fare very well	0.00	7.97	6.71
Will fare well	38.46	47.10	45.73
Will not fare	61.54	44.93	47.56
Base - All Respondents	26	138	164

Table – 4.15: Household Profile

		Safety kit	Kallayani	All
Occupation of Head of Household	Unskilled labour	12.32	15.38	12.80
	Skilled labour	26.09	11.54	23.78
	Small businessman	10.14	19.23	11.59
	Shop owner	10.14	3.85	9.15
	Business/Industrialist but does not employ labor	2.90	7.69	3.66
	Business/industrialist employing 1 to 9 more employees	2.90	0.00	2.44
	Clerk/Salesman	9.42	11.54	9.76
	Employed in supervisory position	2.90	7.69	3.66
	Junior Officer/Executive	1.45	0.00	1.22
	Farmer	8.70	23.08	10.98
	Teacher/Imam/Muajjin	0.72	0.00	0.61
	Peon/Postman	1.45	0.00	1.22
	Foreign service	10.87	0.00	9.15
Education of Head of Household	Illiterate	13.04	11.54	12.80
	Literate but no formal schooling	0.72	0.00	0.61
	Up to class 4	7.25	11.54	7.93
	Class 5 to class 9	59.42	61.54	59.76
	SSC/HHC	14.49	15.38	14.63
	Some college education/Diploma holder but not graduate	0.72	0.00	0.61
	Graduate or above (general)	3.62	0.00	3.05
	Graduate and above (professional)	0.72	0.00	0.61
SEC of Head of Household	Sec A	2.17	0.00	1.83
	Sec B	5.07	3.85	4.88
	Sec C	51.45	23.08	46.95
	Sec D	39.86	65.38	43.90
	Sec E	1.45	7.69	2.44
	Base - All Respondents	138	26	164

5. Detailed Findings on Injectable:

5.1. Awareness and Usage:

Interview was taken only amongst Somaject users. However, about 14% were not aware of their brand in use as can be seen from the following table. On the other hand about 30% of Somaject users know about Depoprovera.

Table – 5.1: Awareness and Usage of Selected Brands (Q.6)

	Total Awareness			Current Usage		
	Urban	Rural	All	Urban	Rural	All
Somaject	92.45	78.85	85.71	100.00	100.00	100.00
Depoprovera	32.08	26.92	29.52	0.00	0.00	0.00
Base - All Respondents	53	52	105	53	52	105

5.2. Attribute rating of different brands on 5 point agreement – disagreement scale:

Users seemed to be quite happy with their currently used brand as the scores were quite high on positives and low on negatives, including price. Depoprovera also obtained good score from those who were aware of it.

Table – 5.2: Attribute rating of different brands on 5 point scale (Q.7 and 8)

	Mean score on 5 point scale	
	Somaject	Depoprovera
Product Attributes		
A well known brand	4.17	4.47
Modern brand	4.13	2.31
High quality brand	4.30	3.24
Local quality brand	4.13	4.22
International quality Brand	3.19	2.13
Low quality brand	1.81	2.50
High price	2.50	2.07
Good value of money	4.39	4.00
Less price	3.44	4.11
Antiquated brand	2.12	4.10
Easily available	4.59	3.63
Image Attributes:		
Low dosage	4.33	4.07
High dosage	1.92	1.72
Less side effect	4.21	3.33
High side effect	1.85	2.80
Very effective	4.42	3.80
'Less effective'	1.75	2.31
'Adjust well'	4.48	3.54
Base – Those aware	105	31

5.3. Buying Pattern:

Almost every injectable user buys it once a quarter. The most common place of purchase is Blue-star pharmacy, followed by general pharmacy. Other sources are not significant.

Table – 5.3: Frequency of Procurement

	Urban	Rural	All
Once in three months	100.00	98.08	99.05
Once in six months	0.00	1.92	0.95
Base - All Respondents	53	52	105

Table – 5.4: Place of Procurement

	Urban	Rural	All
Pharmacy	30.19	36.54	33.33
Blue-star pharmacy	58.49	53.85	56.19
Clinic/Hospital	7.55	0.00	3.81
Doctor	3.77	5.77	4.76
Health worker	0.00	1.92	0.95
Can't say	0.00	1.92	0.95
Base - All Respondents	53	52	105

5.4. Opinion on current brand:

Reasons for using current brand and likes noticed: Both reasons and likes are more or less same which were 'This adjusts well with body', 'Easily available', 'No vertigo felt' and 'No nausea'. However, doctors' advice was also mentioned as reason for using the brand.

Table – 5.5: Reasons for using current brand (Q.12)

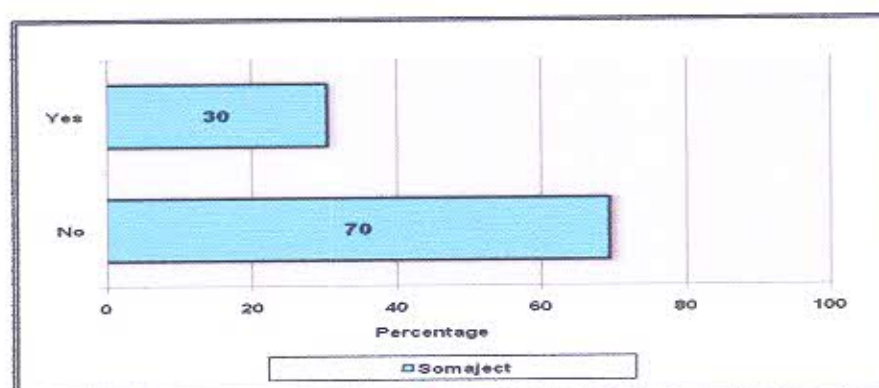
	Figures in percentage
	Somaject
This adjusts well with body	40.95
Easily available	32.38
No vertigo felt	18.10
No nausea	15.24
Use it with doctor's advice	14.29
Low price	12.38
Good efficacy	9.52
High quality brand	7.62
Had regular menstruation	5.71
Doesn't feel weak	5.71
Health remains good (neither bulky nor dry)	4.76
No headache	4.76
Base - All Respondents	105

Table – 5.6: Likes noticed of current brand Q.14

Figures in percentage

	Somaject
This adjusts well with body	45.71
No vertigo felt	32.38
No nausea	23.81
Easily available	16.19
Doesn't feel weak	12.38
Low price	10.48
Had regular menstruation	9.52
No side effect	7.62
Health remains good (neither bulky nor dry)	6.67
Low doze pill	6.67
Good efficacy	6.67
Base - All Respondents	105

Dislikes noticed: About one-third of Somaject users noticed some dislike of the brand. The main dislike noticed was 'Irregular menstruation' in addition to a few other not so notable ones.

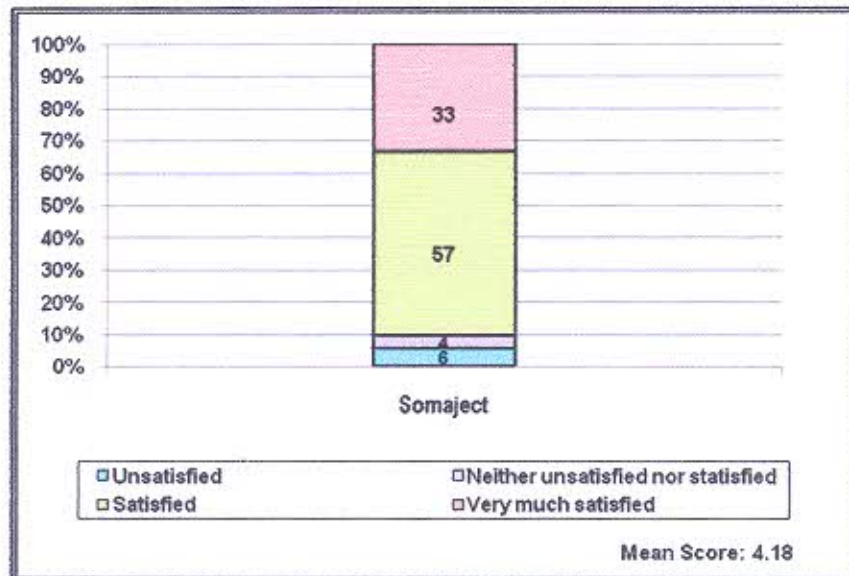
Graph – 5.1: Notice-ability of dislikes f current brand (Q. 15)**Table – 5.7: Dislikes noticed of current brand (Q16)**

Figures in percentage

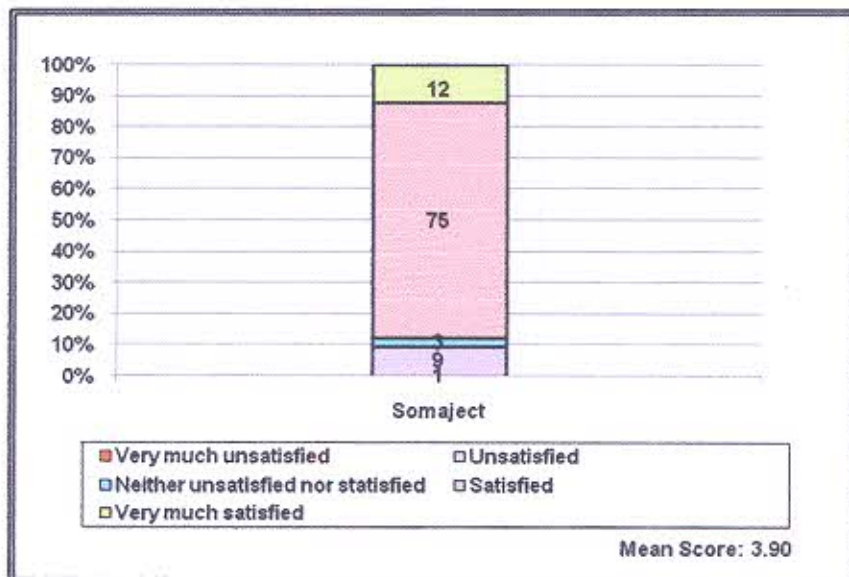
	Somaject
Irregular menstruation	46.88
Body becomes quite bulky	15.63
High price	9.38
Vertigo occurred	9.38
Excessive bleeding takes place during menstruation	9.38
Waist pain occurs	9.38
Abdomen enlarges	9.38
Body becomes weak	6.25
Body pain occurs	6.25
Base - Those express dislike	32

Satisfaction rating of current brand: Brand satisfaction score was above 4.0 on 5.0 point scale, indicating that the users were broadly satisfied with the brand, which however went down to 3.90 with price, revealing some dissatisfaction about its price.

Graph – 5.2: Satisfaction rating of current brand (Q. 17a)



Graph – 5.3: Satisfaction rating of current brand with price in mind (Q. 18a)



Brand loyalty: If own brand is not available in the usual place of purchase, about two-thirds will search in another store. However, a large segment, about one-fourth will use other method and a small segment (4%) would switch to another brand. Amongst those who will search in other stores, an overwhelming majority (84%) will continue searching till current brand is found, indicating a high level of brand loyalty amongst them.

Among those who will switch to other method, 55% will use OCP, 17% Condom, and 7% each will use IUD and Vasectomy. On the other hand, among those who will switch to another brand at any point, about half will use Depoprovera, and the rest will use whatever advised by doctor mainly and husband.

Table – 5.8: What action will take if current brand not available in usual shop (Q23)

Figures in percentage

	Somajest
Will search in different store	64.76
Will start using different brand	3.81
Will start using different methods	27.62
Will use nothing	3.81
Base - All Respondents	105

Table – 5.9: How many shops will search if brand not available (Q24)

Figures in percentage

	Somajest
Start using different brand if not get after searching 1-5 s	8.82
Start using different brand if not get after searching 6-10	7.35
Continue searching until current brand is found	83.82
Base - Those will search in different stores	68

Table – 5.10: What brand will switch to (Q.25)

Figures in percentage

	Somajest
Depoprovera	53.33
Whatever doctor will advise	40.00
Whatever husband will advise	6.67
Base - Those will use different brands	15

Table – 5.11: What method will switch to (Q.26)

Figures in percentage

	Somajest
Oral pill	55.17
Condom	17.24
IUD	6.90
Vasectomy (male sterilization)	6.90
Safe period	13.79
Base - Those will use different methods	29

5.5. Price Elasticity:

Purchase price of Somaject in last occasion: About 80% bought Somaject in the last occasion at BDT 50 or less, and most of others paid between BDT 50 and BDT 100. A few appear to have paid more than BDT 100. Average price paid was BDT 53.48.

Table – 5.12: Purchase price of Somaject in last occasion (Q27)

Figures in percentage

	Somaject
Less than taka 50	25.71
Taka 50	56.19
Taka 51-100	14.29
More than taka 100	3.81
Average	53.48
Base - All Respondents	105

Additional price willing to pay for Somaject: A small number (5%) were unwilling to accommodate any increase. However, about one-third of Somaject users are likely to drop out of the brand if its price is increased by up to BDT 25, about 60% would dropout if it's increased between BDT 25 and 50. Above BDT 50 higher dropouts are likely as can be seen from cumulative figures of the following table.

Table – 5.13: Additional price willing to pay for Somaject (Q28a)

Figures in percentage

	Somaject	Cumulative
Nil	4.76	4.76
Up to taka 25	26.67	31.43
Taka 25-50	28.57	60.00
Taka 51-100	24.76	84.76
More than Taka 200	15.24	100.00
Base - All Respondents	105	

Intention to switch due to price hike of currently used brand: Mostly (90%) will use another method if drops out due to price increase, and the rest opined to dropout of FP method. Among those who will use another method, more than half will use OCP, 15% will use Condom, 14% safe period and the rest will use different other methods.

Table – 5.14: Intended action due to price hike of currently used brand (Q29a)

Figures in percentage

	Somaject
Will use different method	89.52
Will not use anything	10.48
Base – All Respondents	105

Table – 5.15: Method willing to adopt if drops out due to price increase Q.29.c
Figures in percentage

	Somajest
Oral pill	56.76
Condom	14.86
Norplant	2.70
IUD	5.41
Vasectomy (male sterilization)	5.41
Safe period	13.51
Purchase after consultation with doctor	1.35
Base - Those will use different methods	74

5.6. Price of Implant:

Spontaneously, mostly favored price option for Implant was BDT 500 or less including doctors' visit, opined by three-fourth of respondents. Only around one-fourth opted for above BDT 500. While reacting to a price of BDT 1000 including doctors' visit, about half thought it will fare well or very well. However, the rest half thought otherwise.

Table – 5.16: Price mentioned spontaneously (Q30)
Figures in percentage

	Area		All
	Urban	Rural	
Upto taka 200	18.87	19.23	19.05
Taka 200-500	32.08	32.69	32.38
Taka 500	20.75	23.08	21.90
More than taka 500	28.30	25.00	26.67
Base - All Respondents	53	52	105

Table – 5.17: Reaction to price at BDT 1000 including doctors' fee (Q31)
Figures in percentage

	Area		All
	Urban	Rural	
Will fare very well	13.21	3.85	8.57
Will fare well	33.96	46.15	40.00
Will not fare	52.83	50.00	51.43
Base - All Respondents	53	52	105

Table – 18: Household Profile

		Somajest
Occupation of Head of Household	Unskilled labour	18.10
	Skilled labour	20.00
	Small businessman	14.29
	Shop owner	11.43
	Business/Industrialist but does not employ labor	2.86
	Business/Industrialist employing 1 to 9 more employees	6.67
	Business/Industrialist employing 10 or more employees	0.95
	Clerk/Salesman	9.52
	Employed in supervisory position	2.86
	Junior Officer/Executive	2.86
	Senior/mid level officer/Executive	0.95
	Farmer	6.67
	Teacher/Imam/Muajjin	0.95
	Village doctor	0.95
	Professor	0.95
Education of Head of Household	Illiterate	17.14
	Literate but no formal schooling	1.90
	Up to class 4	9.52
	Class 5 to class 9	49.52
	SSC/HHC	13.33
	Some college education/Diploma holder but not graduate	0.95
	Graduate or above (general)	7.62
SEC of Head of Household	Sec A	4.76
	Sec B	7.62
	Sec C	38.10
	Sec D	47.62
	Sec E	1.90
	Base - All Respondents	105