REVIEW MARKET PERFORMANCE
ACTIVITY GUIDE

OVERVIEW

NOTE:
This activity guide assumes that you have already defined a health need and identified your target consumer.

Conducting a Market Performance Review will help you assess how effectively the market is meeting a particular health need for your target consumer. This includes a review of any PSI products and services related to the health need that are delivered through our platforms or Social Enterprises.

This review will help us identify gaps to fill or opportunities to help the market perform better in delivering relevant products and services to Sara.
WHEN TO CONDUCT THIS ACTIVITY

<table>
<thead>
<tr>
<th>Market Performance Analysis can be useful when:</th>
<th>Market Performance Analysis might be less useful when:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• You need to understand the current performance of a market in delivering goods and services.</td>
<td>• A deep dive has been conducted relatively recently and it is unlikely that there have been significant shifts in the market – in which case refer to previous analysis.</td>
</tr>
<tr>
<td>• You want to evaluate the market performance of PSI products and services.</td>
<td></td>
</tr>
<tr>
<td>• As an input to the annual marketing planning cycle.</td>
<td></td>
</tr>
<tr>
<td>• It is critical for building a portfolio strategy to inform a business plan or product/service delivery plan.</td>
<td></td>
</tr>
</tbody>
</table>

TIME, RESOURCE AND STAFFING REQUIREMENTS

<table>
<thead>
<tr>
<th>Who will participate in this activity?</th>
<th>Who time and resources are required?</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Design Team. Marketing and research in particular will take a lead on this</td>
<td>• Field data collection: dependent on what is existing data and what needs to be sourced</td>
</tr>
<tr>
<td>• Consultant / agency could be engaged for market landscaping field work</td>
<td>• Once data is gathered: core team would review market landscaping data, analyze the gaps and identify the key headlines for how well the market is performing and where the key gaps or opportunities are (1-2 days)</td>
</tr>
<tr>
<td>• Marketing and Research technical advisors (as needed)</td>
<td></td>
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</tbody>
</table>
INSTRUCTIONS

GOAL

A Market Performance Review aims to provide a comprehensive analysis of the performance of the health market in serving a health need. As part of this activity, we will:

- Review how well the market is performing in delivering against the target consumer’s health need
- Identify major trends and shifts in the market over the past few years
- Determine whether uneven procurement and distribution of free products or services is impacting distribution, other sectors, and use
- Review each sector, channel, or geographical area to determine whether the market is growing, stagnating, or declining
- Explore the attractiveness of the market to the commercial sector, whose involvement can reduce reliance on external subsidies over time
- Compare the performance of PSI’s own portfolio and platforms to other players in the market, as well as the performance of entire product/service categories (inclusive of both PSI and other players’ (competitor) offerings) in meeting health needs

OUTPUT

The final results and data may be presented in many ways. For example, many country teams opt to present market performance reports as PowerPoint decks.

Category

A term that refers to all products/services of a given type available in market (e.g., condoms in general). This would be inclusive of both PSI and other players’ brands. So, for example, you might ask “How well are condoms as a category meeting consumers’ family planning needs?”
TYPES OF ANALYSES

There are two basic ways to measure a market’s performance:

1. **Market depth** analysis examines trends in the **size of the market** by looking at the total volumes and values of relevant products and services by sector, channel and geographic area.

2. **Market breadth** analysis examines the **variety of products and services** available in the sector, and the distribution outlets which make those products and services available. Specifically, this refers to the ’Ps‘ of the market: what range of products/services are available, the price points available, the places (where) they can be found and the level of promotion in the market.

Beyond that, you should also conduct a **portfolio analysis** if PSI already has a portfolio of products and/or services in the market, to determine whether the portfolio is meeting the target audience’s needs and preferences. You should also do a similar analysis for products and services that compete with PSI’s portfolio.

POTENTIAL SOURCES OF DATA

- Nielsen retail audits
- IMS Health data
- Euromonitor (FMCG products)
- Procurement Planning and Monitoring Report (PPMR): Produced monthly by the USAID | DELIVER Project, this online database provides information on consumption and current/desired stock levels of contraceptive products on a country-by-country basis for 33 countries. Data is provided by ministries of health or USAID partners (Abt Associates, USAID |DELIVER Project), SMOs (MSI, PSI), and UNFPA. “Procurement Planning and Monitoring Report,” available at [http://ppmr.rhsupplies.org/content?id=1](http://ppmr.rhsupplies.org/content?id=1)
- Reproductive Health Interchange (RHI): Hosted by UNFPA, RHI collects data on past and upcoming contraceptive shipments for over 140 countries from the central procurement offices of major contraceptive donors and procurers. This database is updated at variable times that depend on the frequency of data submissions from the data provider. RHI reflects all of UNFPA’s and USAID’s contraceptive purchases, MSI’s and IPPF’s central procurements, and a few other procuring organizations’ purchases. AccessRH, “What is RH Interchange?” UNFPA, available at [http://www.myaccessrh.org/rhi-home](http://www.myaccessrh.org/rhi-home).
- Other commercial datasets: In many countries, smaller marketing research companies will be able to provide data on product pricing and sales.
• Stakeholder interviews: In some cases, it may be necessary to request data from commercial players directly.
• Rapid Market Scans
• Retail Audits
Example

**PSI CAMBODIA ORAL CONTRACEPTIVE DEPTH & BREADTH ANALYSIS**

These slides highlight how PSI Cambodia applied breadth and depth together to analyze trends across sectors for oral contraceptives (OCs). Their trend analysis explored market breadth trends (introduction of new products at new price points) against depth trends (volume and value trends).

**OCs: Market Depth & Breath Snapshot**

Top 5 OCs: Mode Consumer Retail Price

- **OK**
- **Eva Marvelon**
- **Diane 35**
- **Yasmin**
- **Srey Pich**

<table>
<thead>
<tr>
<th>Price ($)</th>
<th>Public sector</th>
<th>Non-profit Private</th>
<th>For Profit Private</th>
</tr>
</thead>
<tbody>
<tr>
<td>$0</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>$2</td>
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<td></td>
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<td>$4</td>
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<td>$6</td>
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<td>$10</td>
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<tr>
<td>$12</td>
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</tbody>
</table>

**OK + Srey Pich = 95% market share; adding Eva Marvelon, Diane 35 and Yasmin = over 99% of market share (2015)**
OCs: Market Depth & Breath Snapshot

Volume & Value in thousands

<table>
<thead>
<tr>
<th>Year</th>
<th>Non-profit Private</th>
<th>Public Sector</th>
<th>For profit Private</th>
<th>Market Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>$3,004</td>
<td>$3,350</td>
<td>$138</td>
<td>$3,138</td>
</tr>
<tr>
<td>2011</td>
<td>$3,625</td>
<td>$4,124</td>
<td>$115</td>
<td>$4,290</td>
</tr>
<tr>
<td>2012</td>
<td>$4,711</td>
<td>$4,609</td>
<td>$202</td>
<td>$5,011</td>
</tr>
<tr>
<td>2013</td>
<td>$5,389</td>
<td>$4,918</td>
<td>$258</td>
<td>$5,947</td>
</tr>
<tr>
<td>2014</td>
<td>$5,716</td>
<td>$4,357</td>
<td>$283</td>
<td>$6,240</td>
</tr>
<tr>
<td>2015</td>
<td>$6,046</td>
<td>$4,492</td>
<td></td>
<td>$6,440</td>
</tr>
</tbody>
</table>

Availability:
At least 1 OC brand available in 99% of Pharmacies and 98% of the 3,730 registered outlets in 2015.
PART 1: MARKET DEPTH

Market depth analysis focuses on total product/service volumes and the value of those products/services in the market for the entire category (all brands/providers, not just PSI).

Examining trends in volume and value can often provide insights into how well the market is performing – for example, how much volume non-government organizations (NGOs) or the public sector have contributed over time compared to the commercial sector and how that volume is changing.

Specifically, we will want to measure:

- **Total Volume** – Total sales/distribution volume over the last year, compared to previous years.

- **Total Value** – This can be calculated by multiplying the total volume by the consumer price over the last year. We can then compare the result to previous years.

- **Trends over time / by sector, region, brand** – We typically derive the most insights by analyzing trends over time and breaking down volume and value data by sector, player, brand and geographic area.
  
  o Begin by graphing total market volume and value across a timeline

  o Next, add any significant events related to the health need to the timeline (e.g., a donor launches an initiative to push a particular product, a manufacturer introduces a new brand, significant price changes, etc.)

  o Next, break down the volume and value data by sector/channel (public, commercial, SMO/NGO) and geographic area

  o You can break the data down further by marketer/brand owner in each sector

  o Finally, break the numbers down by specific brands
Examples

MARKET VOLUME AND VALUE OF CONDOMS IN PAKISTAN

Note: 2011-12 data are lighter shades as condom data for the commercial sector are not available
FAMILY PLANNING MARKET IN UGANDA
This slide highlights PACE Uganda’s analysis of market depth for contraceptives. Several insights immediately emerged—e.g. the impact of sporadic investments in implants, including a worrisome gap in availability during the last year for which data is available. Condom depth analysis reveals that condom distribution spiked, then declined as the contributions of social marketing and commercial brands decreased.
MENSTRUAL HYGIENE MANAGEMENT IN INDIA

PSI India focused their market depth analysis on both historic and projected volume and value trends for sanitation products, based on data that was commercially available from Euromonitor (chart on left). The data showed that the market was doubling every five years. Using this and the data from the use/need analysis, the team was able to project the growth path of the market over the coming decades demonstrating that, while growth was currently strong, the market was really just getting started. The projection of the eventual market size proved to be a very useful tool for getting the attention of commercial actors and policy makers.

Sales of sanitary napkins in India, 2002-2021 and projected sales of sanitary pads in India, 2002-2060

Sales in 2021, are expected to exceed 10B pads by 2020, but still huge room for continued growth.
PART 2: MARKET BREADTH

Market breadth analysis examines the availability, variety and prices of products/services across different distribution channels, and then identifies the market actors who work to create demand for the product or service (either for the category as a whole or a specific brand). Just as with Market Depth analysis above, Market Breadth should look at all the available brands and providers in the category, not only PSI.

We typically analyze market breadth in terms of what marketing professionals call the “4Ps”:

- **Products** – Identify the range of products/services available in the market
- **Prices** – Compare the prices of available products/services (as categories and for specific brands/providers) and how affordable they are for the target consumer
- **Places** – Identify and compare distribution across channels and outlets where consumers can obtain the products/services and compare availability by geographic area
- **Promotion** – Assess the extent and effectiveness of any efforts by market actors to generate awareness and demand for the product/service among the target population. This includes:
  - Advertising/marketing for specific brands or providers (often carried out by commercial actors)
  - General promotion of the entire product/service category (often carried out by government or NGO actors as part of a social behavior change communication campaign)

Desk reviews, along with retail audits, MAP data, spot visits to retail outlets and interviews with key actors in the market, can tell you whether promotion is consistently supported across the category and populations.

GUIDING QUESTIONS

- **Is access to the product or service** decreasing or increasing? Are access points sufficient and relevant to the target group?
- **Are a wide variety** of high quality brands/providers and price points available to consumers? Are there any product or service gaps? Is the experience of the products/service relevant and appealing to consumers? Are there any quality issues?
- **Are products and services** affordable to the target consumer? Are there price gaps in the category (i.e., a big price gap between subsidized social marketed brands and commercial brands)?
- **Is there sufficient promotion** in the market to drive awareness?
Examples

CONTRACEPTIVES / CONDOMS IN PAKISTAN

Product Landscape

CONDOMS
- Sathi
- Touch
- Josh
- Happy Life
- Hamdam
- Klimax
- Excite
- Rough Rider
- Xtacy
- Durex

2nd GENERATION
- Novadol
- Familia
- Familia F
- ESTRANOR

3rd GENERATION
- Diane 35
- MELIANE
- Desofam
- ACNOR
- CYPRODIOL

4th GENERATION
- YAZ

ECPs
- ECP
- EMKIT
- Estinor
- Poster

ICs
- 1-MONTH
- Femiject
- NORIFAM
- 2-MONTH
- Novaject
- 3-MONTH
- DepoProvera
- FAMILA VIAL
- NORIGEST
- Megestron

Implants
- 3-YEAR
- Femplant
- 5-YEAR
- Jadelle
- Dhanak Cu 250 Preload

IUCDs
- 3-YEAR
- Multiload
- Protect 5
- Heer
- 5-YEARS HORMONAL
- MIRENA
- 10-YEAR
- Safeload
- Dhanak T Cu 380A Plus

Note: There are 145 condom brands, but only the top 10 are shown here.

Consumer Price Landscape for Condoms

- Sathi
- Generic

Price (PKR)
- Generic (76,927,115 at 0 PKR)
- Greenstar
  - Sathi (94,860,309 at 10 PKR)
  - Touch (8,569,265 at 33 PKR)
- DKT
  - Josh (9,446,410 at 32 PKR)
- Karex
  - Happy Life (5,670,330 at 30 PKR)
  - Klimax (1,431,400 at 63 PKR)
- Xlacky (833,140 at 51 PKR)
- KSM
  - Excite (2,446,590 at 34 PKR)
  - Hamdam (2,976,800 at 31 PKR)
- Rough Rider
  - Hamdam (2,976,800 at 31 PKR)
  - Rough Rider (1,968,730 at 33 PKR)
- Thai Nippon
  - Amor (134,800 at 72 PKR)

Note: There are 145 condom brands, but only generic brands and the top 10 are shown here.
Source: GSM visits to shops/pharmacies Nov. 2016; PSB 2014/15; IMS 2014/15
Breadth of products at a typical outlet

The typical pharmacy / retail outlet in Yangon stocks a surprising breadth of hypertension products:

- 30 (16-57) brands containing
- 11 (7-19) molecules produced by
- 17 (11-25) manufacturers.

It sells approximately US$ 18 of anti-hypertensive products per week.

The vast majority of sales consist of short courses (e.g. split packs of 3-5 pills or a blister).

A surprising amount of variability in the pricing of generics

The prices (US$ per person year) reported by outlets for six commonly sold products. The size of the circle is scaled by sales volume.
MENSTRUAL HYGIENE PRODUCTS IN ETHIOPIA

In Ethiopia, PSI teams broke down the volume data on menstrual hygiene products by whether the products were locally manufactured or imported. The teams also broke down the data by type of product. Further breadth analysis factored in other elements such as price, distribution strategies (place) and quality (product) to illustrate the breadth of the market.
MENSTRUAL HYGIENE PRODUCTS IN INDIA

In India, the PSI teams looked across the types of products available on the market and mapped market shares and brands. They also did a rapid retail outlet survey to identify the products, including their prices and key attributes, that were available on the retail market in select locations.

The overwhelming majority of sales are for disposable, non-biodegradable pads and there are a huge number of brands.

Select MHM Products Available in India

MHM products (58% current use)

Sanitary Pads (99%)
- Non Biodegradable (~99%)
- Biodegradable (?)
- Reusable pads (?)
- 80 Brands
  - Standard pads without wings (55%)
  - Standard pads with wings (10%)
  - Ultra-thin pads with wings (35%)

Other products (1%)
- Cups (?)
- Panties Liner (0.7%)
- Tampons (0.2%)
- Period panties (?)
- 3 brands
- 3 brands
- 6 brands
- 6 brands
- 4 brands

Note: 1Only includes major MHM products in India, based on primary and secondary research and may not be exhaustive. Biodegradable-Heyday, Sathi, Aanandi , Reusable pads-Hygiene and you, Feel free (gramalaya), Cups-Rustic art, Wow freedom: Premium, menstrual cup and wash, She, Tampons-Sofy, Kotex, Pro comfort, Bella, Soft tampons, tampax, Period Panties-Soch, Bralux, Clovia, Adira; Panties Liners: Carefree, Sofy, Balla, Equate, Always, Stayfree
### The prices and features of products on the market in rural UP

<table>
<thead>
<tr>
<th>Brand</th>
<th>Price/Package (Rs)</th>
<th>Notes</th>
<th>Features</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pro</td>
<td>3</td>
<td>No Wings</td>
<td>Extra Long</td>
</tr>
<tr>
<td>Easy Secure</td>
<td>7</td>
<td>-</td>
<td>Extra Large with Wings</td>
</tr>
<tr>
<td>Stay Free Secure Whisp</td>
<td>8</td>
<td>-</td>
<td>Extra Large, Anti-Bacterial</td>
</tr>
<tr>
<td>Whisp Pro</td>
<td>8</td>
<td>-</td>
<td>Extra Large, No Wings</td>
</tr>
<tr>
<td>Softy</td>
<td>7</td>
<td>-</td>
<td>Extra Long, No Wings</td>
</tr>
<tr>
<td>Softy Secure</td>
<td>7</td>
<td>-</td>
<td>Extra Large, No Wings</td>
</tr>
<tr>
<td>Whisp Pro</td>
<td>4</td>
<td>-</td>
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<td>3</td>
<td>-</td>
<td>Extra Long, No Wings</td>
</tr>
</tbody>
</table>

- **Prices Increasingly Move Out of Range for Respondents**: As prices increase, retailers begin to stock fewer and fewer of these products due to low customer demand.

- **Respondent Preferred Price Range**

- **Note**: Products at this price range offer fewer features (such as winged) and are associated with poor quality.
PART 3: PSI PORTFOLIO ANALYSIS

In the Market Depth and Breadth above you have been looking at all the brands and providers in a category. In Portfolio Analysis you will focus specifically on PSI products and services.

Portfolio analysis helps PSI better understand its current portfolio and identify any opportunities to improve existing products/services or launch new products/services to grow the market for your target consumer.

Begin by describing the existing PSI portfolio in the market. You can now apply the 4Ps to evaluate how PSI’s current portfolio is performing in the market and delivering against the target audience’s needs and preferences.

Again the 4P’s are:

- **Products** – What products/services are we offering to consumers? Is the product/service experience delivering against consumer needs?
- **Prices** – Do our prices compare favorably to alternatives and are they affordable for our target population(s)?
- **Places** – Are our products conveniently available via the channels and outlets our target consumers buy similar products from? Are they available in all geographic areas where a need exists?
- **Promotion** – Are we doing enough to promote our brands in particular and the category in general? How effective are our promotional efforts for generating demand among the target population(s)?

**NOTE:**
Market factors aside, it is critical that PSI’s own products and services are effective, desirable, affordable and available. Simply performing better than the alternatives should not be considered sufficient.

COMPETITIVE ANALYSIS

In addition to PSI’s portfolio of products and services, you should review competing products/brands to explore how well they are performing.

Remember that a ‘competitor’ may not always be a similar product in the same category.

For example, consumers sometimes replace Oral Rehydration Salts (ORS) products with lower cost water flavoring products because there is a lack of understanding of the specific beneficial ingredients that ORS contains.

A template for completing this own portfolio and competitive analysis is provided as part of the Keystone Project Presentation template.
## PSI Portfolio Analysis

<table>
<thead>
<tr>
<th>Product</th>
<th>Price</th>
</tr>
</thead>
</table>
| • Photo of Offering  
• Specifications of offering  
• Key features of the offering  
• What is known about consumer acceptance / preference of the product?  
• Are there any quality/usage issues?  
• Brand equity perception (if known) | • Ideally outline consumer, provider, retailer, wholesaler pricing as available  
• Outline any pricing promotion strategies |

<table>
<thead>
<tr>
<th>Place</th>
<th>Promotion</th>
</tr>
</thead>
</table>
| • Where is it distributed?  
• How readily is it available? | • What types of promotion are conducted?  
• What level of promotional spend (if known)?  
• Examples of promotional materials (e.g. flyers, digital links). |

## Competitive Landscape

<table>
<thead>
<tr>
<th>Product</th>
<th>Price</th>
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• What level of promotional spend (if known)?  
• Examples of promotional materials (e.g. flyers, digital links). |
CONCLUSION
At the end of this activity you should have built a comprehensive picture of the market:

1. What is the data telling you? What are the key headlines about what is happening in the market?
   - How well is the market (for this product/service) currently performing (growing or declining)? What are the main drivers of this?
   - Are there different sections (e.g. product or pricing segments) of the market or offerings that are performing better or worse than others? Why?
   - How well are the current products/services (PSI and competitive offerings) delivering against Sara’s needs? Where are the gaps?
   - What are the major challenges or opportunities across the 4Ps in the market (e.g. opportunities to increase access through broader distribution, consumer pricing challenges)?

2. Draw out the major conclusions:
   - What are the key gaps in the market?
   - What are the biggest opportunities to grow the market (for this product/service) and serve the consumer’s needs better?

Build the above analysis into a concise overview that tells the story of the current status of the market performance for this particular product or service (in ppt or other format).

Summarize your findings in the Keystone Project Presentation template, with a short explanation based on the data you gathered. Then return to the Keystone Manual and continue with the next step.