



Pediatric diarrhea treatment Project Sunshine

SEPT 2014

Agenda

- 1. Study background and objectives**
- 2. Work-plan**
- 3. Key product barriers**
- 4. Testing methodology**
- 5. Research Results – Pack Design**
- 6. Research Results – New Products**
- 7. Dissemination & next steps**

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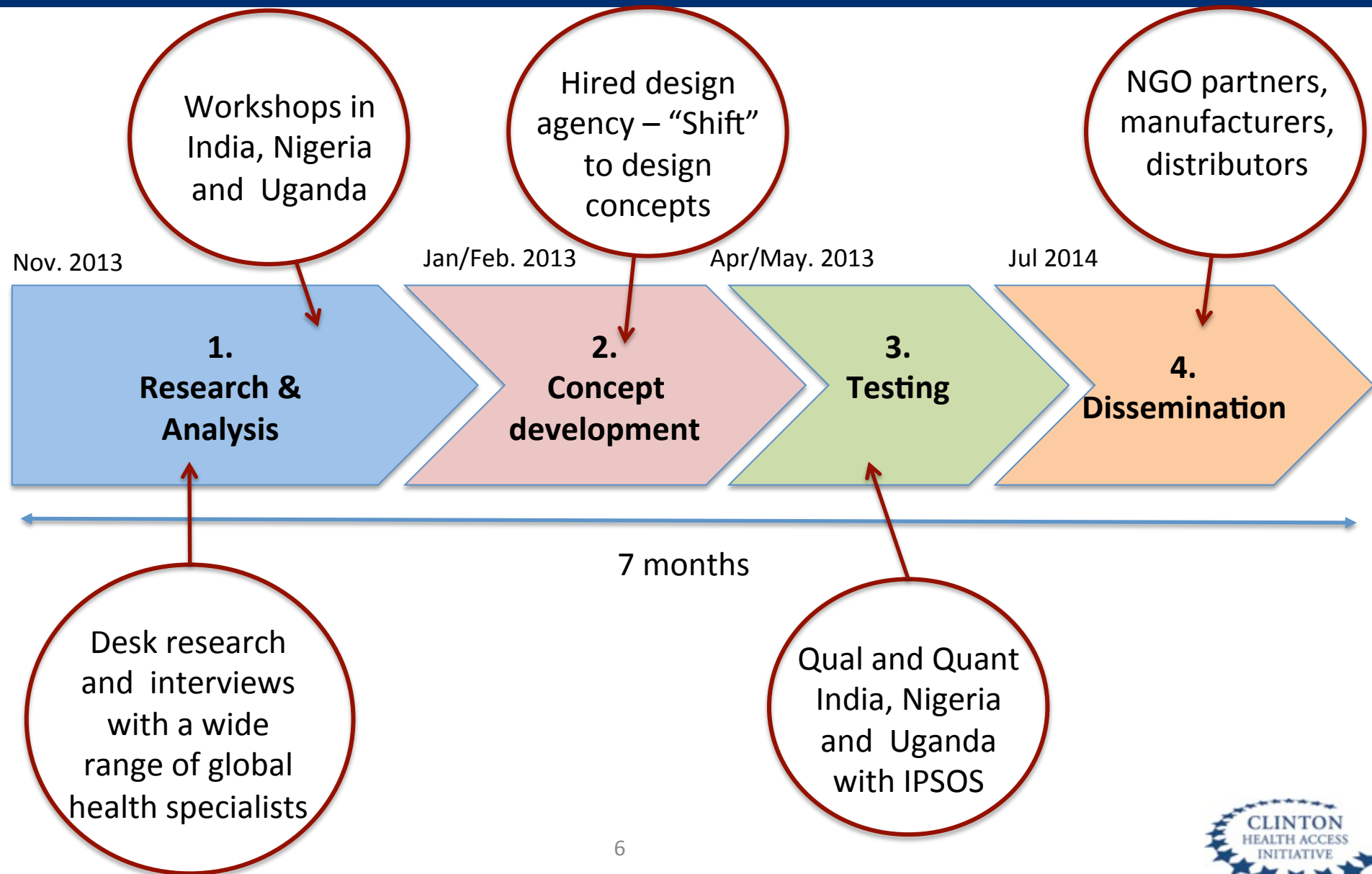
Study background and objectives

- **Context:** while there are many barriers to the scale up of ORS and zinc, one of the reasons for lack of ORS + zinc use is user dissatisfaction with the product
- **Challenge:** address consumer barriers on ORS and zinc products to increase preference and usage
- **Research objectives:**
 - Evaluate end user acceptance and ways for improvement
 - Evaluate the willingness to buy

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Workplan



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Key product barriers:

1 - ORS preparation and administration to the child

- Bad taste
- Cumbersome preparation
- Inaccurate preparation
- Wastage



2 - ORS and zinc dual therapy are neither known nor visible

- Low category top of mind awareness
- Low dual therapy awareness



3- Compliance to zinc treatment

- 10 to 14 days compliance



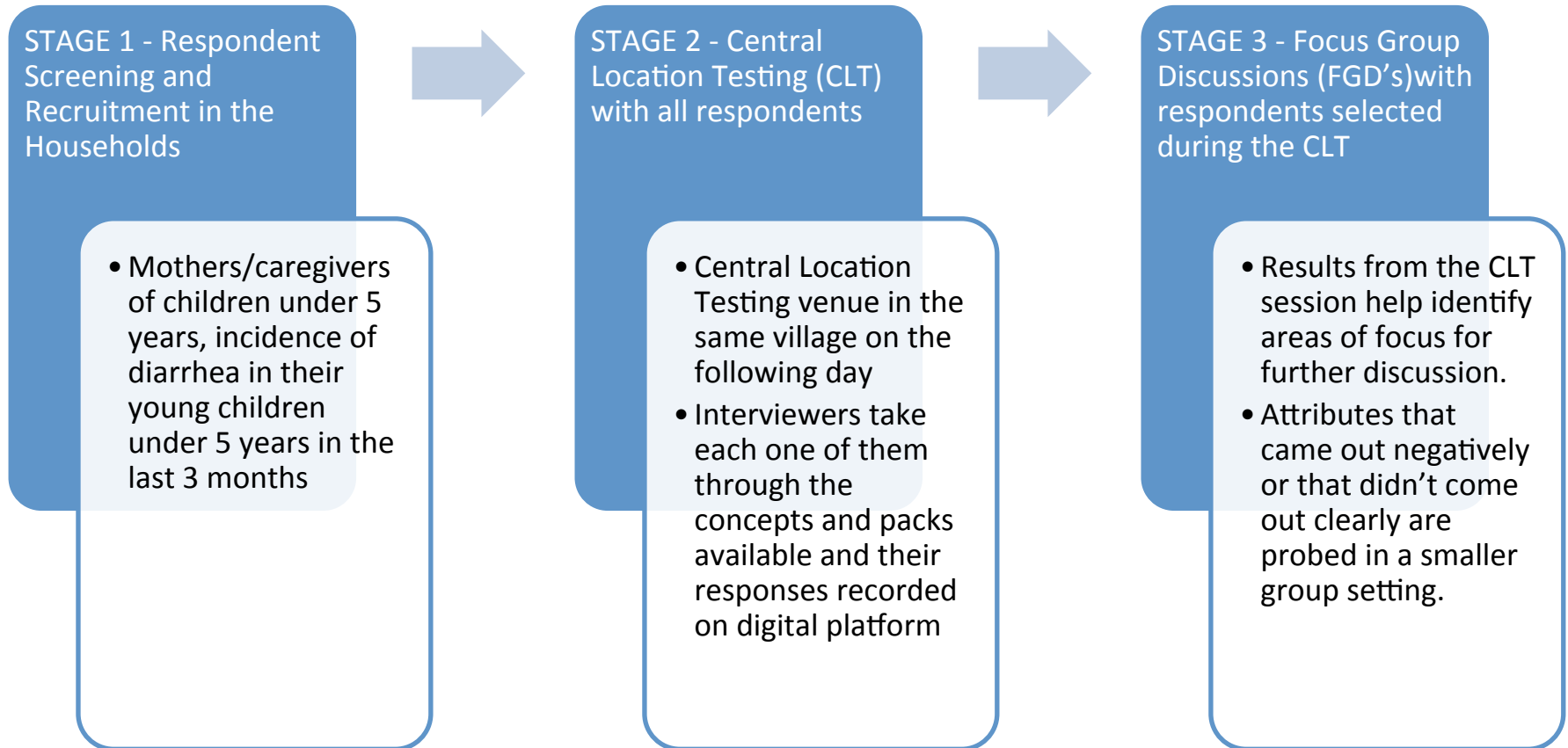
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Testing methodology

- **Target:**
 - Main target: rural mum with kids below 5 years old
 - Secondary target (for check purpose only): rural providers
- **Location: 3 countries**
 - Nigeria: rural areas in 3 states (Lagos, Rivers, Kano)
 - Uganda: rural areas in 2 districts (East and North)
 - India: rural areas in 2 states (UP, MP)

Testing conducted by IPSOS in 3 countries



Summary Of Interviews With Respondents

Mothers with children under 5 years:

Country	States	Districts	No. Of FGDs	CLT Interviews Per Area		Providers:
India	Madhya Pradesh	Barwani	1	30	180	42
	Madhya Pradesh	Ujjain	1	30		
	Uttar Pradesh	Deoria	1	30		
	Uttar Pradesh	Barabanki	1	30		
	Uttar Pradesh	Allahabad	1	30		
	Uttar Pradesh	Sitapur	1	30		
Nigeria	Lagos	Lekki	1	25	225	42
	Lagos	Ikorodu	1	25		
	Lagos	Epe	1	25		
	Rivers	Etche	1	25		
	Rivers	Opobo	1	25		
	Rivers	Oyigbo	1	25		
	Kano	Kura	1	25		
	Kano	Wudil	1	25		
	Kano	Geziwa	1	25		
Uganda	East	Kamuli	1	25	150	35
	East	Mbale	1	25		
	East	Tororo	1	25		
	North	Gulu	1	25		
	North	Lira	1	25		
	North	Koboko	1	25		

RESPONDENT CLASSIFICATION				
	Total (592)	India (201)	Nigeria (237)	Uganda (154)
Current user of ORS	36%	35%	34%	42%
Lapsed User of ORS	31%	36%	32%	23%
Non-User	33%	29%	35%	36%

Notes:

- Study on users, lapsed-users and non users didn't show any differences so analysis is presented on total caregiver population
- If not mentioned findings on providers are similar to caregivers
- Presenting India as an example today and will point out key differences with Uganda and Nigeria

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Three designs tested

Pack 2



Pack 3



Pack 1

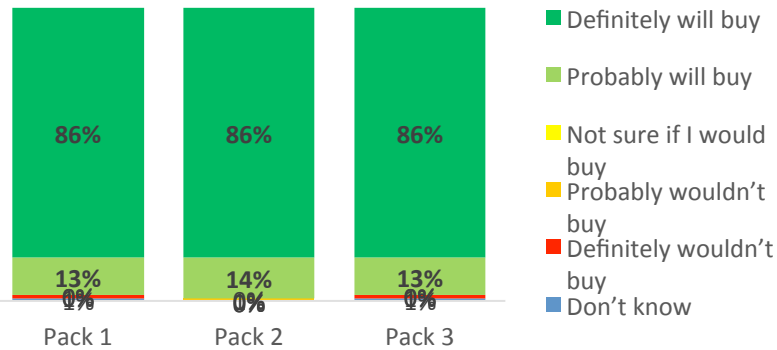


ORS front pack designs



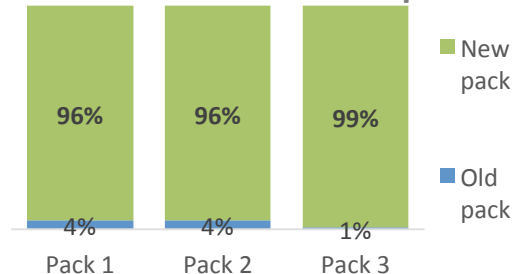
Strong purchase intents and preference vs current product for the 3 new packs

Purchase intent



Q: Would you buy a product with such a pack?

Preference vs current pack



Q: Comparing a product with this kind of pack with what is currently found here (show sample) which pack do you prefer?

A strong **trust** in these packs. Pack 2 and 3 are especially trusted at respectively 99% and 100%

Q: Does this feel like a pack for a product you can trust?

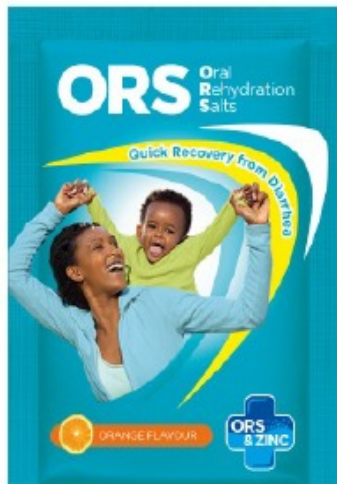
The 3 packs convey key messages very well especially:

- Will treat diarrhea
- Will rehydrate
- Will give back energy and strength to my child
- Is suitable for children

Pack 1 is slightly underscoring on “my child will like it”

Note: Indian caregivers were **very price sensitive** so new pack design should not look too expensive

What elements are driving the preference?



Clear and easy to understand packs (not too many messages and graphics)
=> This a medicine to treat diarrhea and that will help my child to recover

Image or graphic of a healthy and full of energy baby

Color codes (blue, white) that shows that this is a medicine they can trust

Good taste appeal: showing the orange flavor using the fruit and orange color

Zinc front pack designs



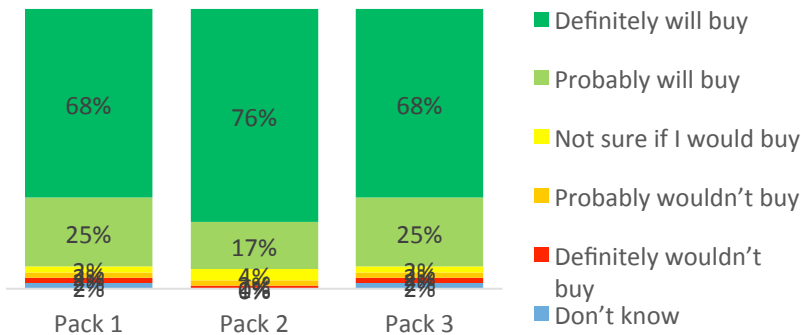
1

2

3

Strong purchase intent for the 3 new packs

Purchase intent



Q: Would you buy a product with such a pack?

A strong **trust** in these pack.

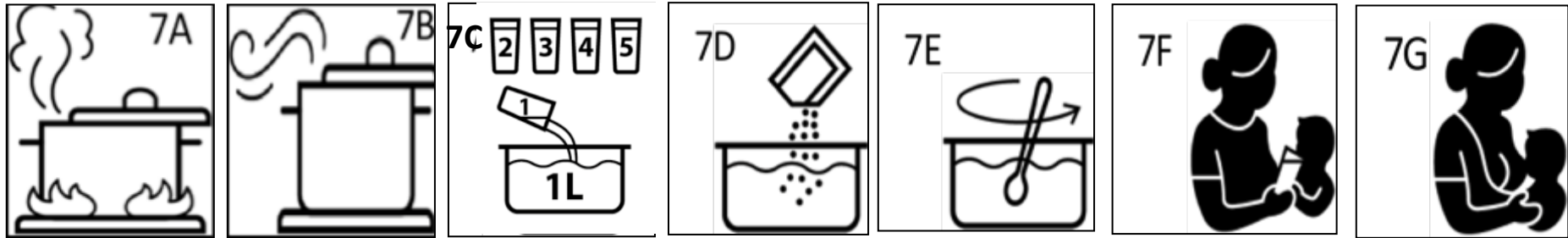
Q: Does this feel like a pack for a product you can trust?

The 3 packs convey key messages very well especially:

- Will treat diarrhea
- Will give back energy and strength to my child
- Is suitable for children

Pack 2 is underscoring on “this product will taste good”, as it is neither colored nor mentioning the taste

ORS back of the pack pictorials



A strong appeal

- **99% of caregivers prefer this back of the pack pictorials to current**
- **96% of the caregivers think these are the right back pack design** for such a product as ORS
- **Priority steps** should be:



- Nevertheless pictures **7C** and **7F** were **confusing**:
 - **7C**: it having the unit to measure water and having the cups created confusion
 - **7F**: interpreted by many respondents as a mother reading a book to a child

Boil the water

Allow the water to cool without getting contaminated

Mix the ORS to the water with clear measurements

Keep on giving it to the child

ORS back of pack recommendation



1 Litre sachet
80 x 105mm

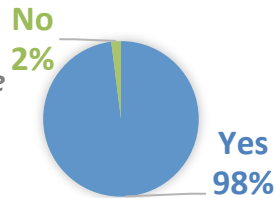


250mL sachet
40 x 52.5mm

Zinc blister & logo

Potential to help caregivers complete the full treatment

Q: Do you think such blister printing will help you complete the full course of treatment?



69%



31%



Q: Of the two blister printings I have just showed you, which one would you prefer?

Q: of the logos I have shown you which one of the two do you think is showing zinc tablet as a dispersible tablet?

28%



72%



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5 concepts:

ORS Smaller Satchet



ORS Premix



ORS Effervescent Tablets



ORS + Water Purifier



Co-pack in a plastic pouch



ORS smaller sachet



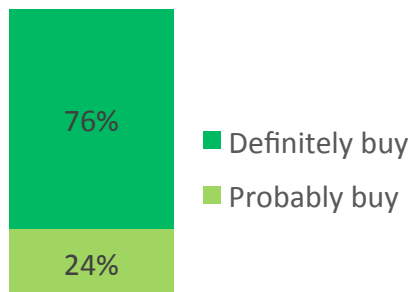
Good appeal and purchase intent

93% of caregivers liked it very much or extremely



Q.: How much do you like or dislike this concept overall as described?

100% of caregivers would buy it



Caregivers India (201)

Q: If you found this product in a shop/pharmacy, would you buy it?



Driven by the fact that it **reduces waste** and is **economical**



But some typical ORS challenges remain, especially the **bad taste**



High willingness to pay

Unprompted ideal price is INR 5

At INR 4, 95% of caregivers would buy the ORS smaller sachet

Q: At what price amongst the ones I have just showed you would you consider this product to be IDEAL for you to consider purchasing it for each episode of diarrhea?

Q: would you be willing to buy this product at the price shown on the show card?

ORS effervescent tablet



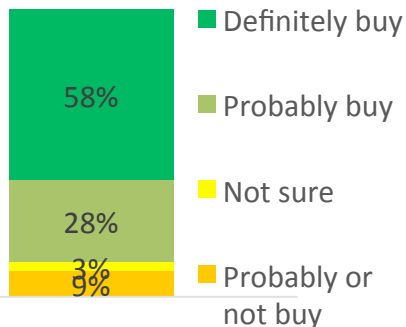
A good appeal and purchase intent

85% of caregivers liked it very much or extremely



Q.: How much do you like or dislike this concept overall as described?

86% of caregivers would buy it



Caregivers India (201)

Q: If you found this product in a shop/pharmacy, would you buy it?



Driven by the **medicinal positioning** and **ease of preparation**

"It dissolves very easily in the water – no need to stir – doesn't leave a sediment – therefore it is very easy to handle during preparation."



Medium willingness to pay

Unprompted ideal price is INR 5

At INR 6, 78% of caregivers would buy the ORS effervescent tablet

ORS Premix



% of caregivers **liked** it very much or extremely

Tetra pack

Plastic bottle

Plastic Pouch



88%



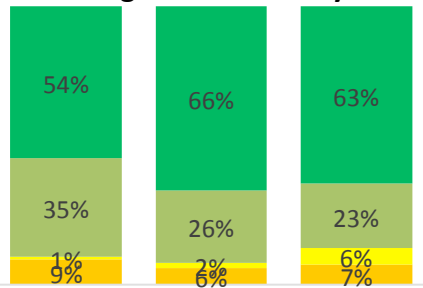
81%



73%

Q.: How much do you like or dislike this concept overall as described?

% of caregivers would buy it



Tetra pack Plastic bottle Plastic pouch

Q: If you found this product in a shop/pharmacy, would you buy it?



Driven by the fact that there is **no preparation**
 + *Tetra pack*: looks like juice => easy to give to a child, no need to get safe water, attractive pack (no breakage)
 + *Plastic bottle*: it has a lid => no risk of spillage
 + *Plastic pouch*: looks not too expensive



Difficult for a baby to suck or drink from bottle
 - *Tetra pack*: no lid
 - *Plastic pouch*: no lid, strong fear of spillage



- *Tetra pack*: **at INR 25 65% would buy.** Unprompted ideal price is INR 20
- *Plastic bottle*: **at INR 20 86% would buy**
- *Plastic pouch*: **at INR 20 78% would buy**

ORS + Water purifier



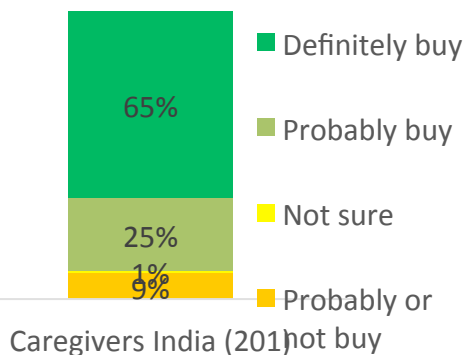
A good appeal and purchase intent

89% of caregivers liked it very much or extremely



Q.: How much do you like or dislike this concept overall as described?

90% of caregivers would buy it



Q: If you found this product in a shop/pharmacy, would you buy it?



Driven by the fact that it has a **double action and ease of preparation**

"It saves the time for boiling water and preparation in general. The concept gives double protection and treatment"



Water Purifiers have an **unpleasant taste and smell** – that will interfere with the taste and smell of ORS



Medium willingness to pay

Unprompted ideal price is INR 6

At INR 7, 80% of caregivers would buy

Co pack in plastic pouch with measurement



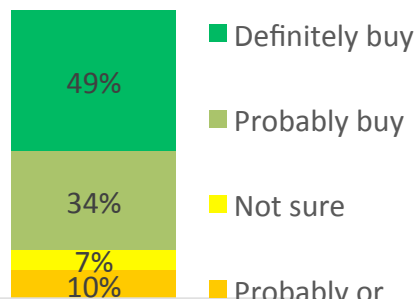
Less appeal than other concepts

73% of caregivers liked it very much or extremely



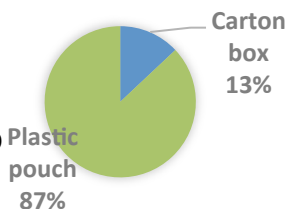
Q.: How much do you like or dislike this concept overall as described?

90% of caregivers would buy it



Caregivers India (201)

87% of caregivers prefer plastic pouch to carton box



- All drugs are in one pack
"No need to move around looking for different drugs. It saves time. It saves transport money"
- Both mixtures can be prepared together (*understanding issue!*)
- Transparency : "I can see what's inside"



- Too many drugs – not easy to administer
- Might be too expensive
- So complex that cannot administer without asking the doctor



Lower willingness to pay

Unprompted ideal price is INR 30

At INR 60 60% of caregivers would buy

Some key differences in Uganda & Nigeria:

- Less price sensitivity than in India
- In Nigeria, a stronger preference for a trendy, modern and captivating pack
- In Uganda, there was hesitation about the effervescent bubbles maybe causing harm to the child
- There was concern on Pack 3 with the mother swinging the child in Uganda



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Dissemination results to date:

Uganda:

- Research presented to key manufacturers/suppliers
 - One manufacturer will introduce small sachet
 - Two manufacturers implementing pack design improvements
 - One manufacturer launching a co-pack



Dissemination results to date:

India:

- UP government implementing pack design improvements



Nigeria:

- Research presented to key manufacturers/suppliers
 - One interested in the blister pack design
 - Two interested in pack design improvements
 - Interest in smaller sachets in the longer term

Results presented to two global pharmaceutical companies with R&D capabilities

More information?

Questions/comments/more information - please contact:

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