

Submitted to:

AID/Office of Population
Family Planning Services Division

MARKET RESEARCH PLAN
FOR POTENTIAL CSM PROJECT
ECUADOR

November, 1981

(Based on information gathered during trip of 7/19-28/81)

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Project No. AID/DSPE-CA-0087

EDITOR'S NOTE

Contraceptive social marketing programs are also known as commercial retail sales (CRS) programs, contraceptive retail sales (CRS) programs, commercial distribution of contraceptives (CDC) programs, or sometimes simply social marketing programs. In these reports the term CSM is generally used, except when a specific project has adopted one of the above terms as, or as part of, its project name.

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MARKETING RESEARCH STUDY

I. SUMMARY

It appears that the capability to conduct the necessary market research for the proposed CSM project in Ecuador currently exists within several local firms.

Both qualitative and quantitative studies can be conducted by the qualified research firms. However, the qualitative phase will require more extensive technical assistance than the quantitative as the methodology for this type of research is less well-developed in Ecuador.

A wide range of both costs and time required to conduct the necessary studies was quoted by the research firms visited by the consultant. Responses to the RFP should clarify these discrepancies.

A preliminary research design with tasks and timetables is recommended in this report. A recommended outline for the RFP to the market research firms is also included.

II. BACKGROUND

During the period July 19 - July 28, 1981, consultation was provided on market research capabilities in Ecuador.

The workscope for this consultation included:

- A. An assessment of market research firms in Ecuador.
- B. A summary of relevant market information available in the trade.
- C. A preliminary design for the market research study which would serve as a request for proposal (RFP) to be issued by APROFE to qualified research firms.

This report covers each of these workscope areas, and includes recommendations. Prior to the consulting trip to Ecuador, a briefing was held with Mr. Arthur Danart of AID and Ms. Betty Ravenholt and Ms. Gail Washchuck of the Futures Group.

III. PRIOR RESEARCH

Few studies are available in Ecuador which would contribute relevant marketing information on knowledge, attitudes and behavior related to contraception. Information was sought from APROFE and USAID/Quito which has access to studies conducted by the Ministry of Health. The research studies which have been conducted seem to point to an openness and desire among Ecuadorian women to learn more about contraception. No sources were found which referred specifically to men and family planning in Ecuador.

A study conducted by Scrimshaw (1973) among urban immigrants in the city of Guayaquil revealed a high level of general knowledge of contraception among this group. Eight of ten women surveyed said they knew about contraception with about one of twenty stating that they were actually taking the pill. Over a third of the women interviewed felt that sterilization of the female was a good approach to contraception. Scrimshaw found that, although the methods used were not always the most effective, nearly half of the women had taken some measure to try to prevent pregnancy.

The Ministry of Health conducted a study among rural areas in 1977 and found that nine of ten women surveyed believed that it was a bad idea to give birth to children spaced too closely together. In addition, about half of respondents from the sierra and two-thirds from the coast said they would like to take some measure that would prevent them from having any more children. The most frequently cited reasons for being in favor of family planning were related to economics and simply not wanting any more children.

Those women from the sierra who said they were not interested in family planning most often said it was because they felt the methods were too new. Coastal women were most likely to say they were not interested in contraception because "they had no need due to their age."

In 1977, APROFE surveyed its client population in an attempt to create a profile of their characteristics. While little information was revealed which directly related to attitudes toward contraception, it was found that the most frequent primary sources of information on the subject were female friends and relatives.

Clearly, more research on the subject is needed before an effective Contraceptive Social Marketing program can be planned. Both Dr. Paolo Marangoni of APROFE and Sr. Manuel Rizzo of USAID/Quito expressed interest in, and support of, market research which would provide direction for a CSM program in their country.

IV. MARKET RESEARCH FIRMS BASED IN ECUADOR

The consultant's workscope included an assessment of market research capabilities in Ecuador. The results of this assessment show that the capability to conduct qualitative and quantitative research currently exists, although a qualitative study appears to require a greater degree of outside supervision. Discussions were held with representatives of independent research firms and major advertising agencies which conduct marketing research. A description of each firm and its capabilities follows, in the order in which the firms were visited:

- o MARPLAN — Prior to departure for Ecuador, a telephone conversation was held with Ms. Anna Maria Sarmiento of Marplan, a New York based international marketing research firm. Ms. Sarmiento reported that Marplan does not maintain permanent research capabilities in Ecuador, but subcontracts to local firms. She said she is familiar with Datos Ecuador and Pronos. She added that it should not be difficult to conduct quantitative research using a local firm but that she does not know of a local firm who is adept at qualitative research.
- o PRONOS — Pronos is a marketing research firm located in Quito with a field office in Guayaquil. Sr. Horacio Roig, research director, met with the consultant and outlined the firm's capabilities.

Sampling — Pronos currently employs the 1974 census as the sampling frame for quantitative studies. Respondents for qualitative research are

recruited on a house-to-house basis, once neighborhoods are identified as containing the target SES group.

Interviewers — Three supervisors in Quito and three in Guayaquil are employed on a full-time basis. Part-time interviewers are hired as needed in each major urban area.

Quantitative — It appears that the majority of the firm's experience lies in product-oriented quantitative market research in Quito and Guayaquil. The firm has had no experience in conducting research among rural populations. Pronos currently conducts a monthly omnibus panel* of 820 households each in Guayaquil and Quito. Cost estimates for a quantitative study ranged from \$10,000 to \$12,000 for a sample of 800 respondents.

Qualitative — Sr. Roig stated that Pronos has had experience conducting product related focus group research among urban respondents. The firm has had no experience conducting qualitative research among rural populations. Groups can be videotaped if desired. An estimate of \$500 per group was given.

- o DATOS ECUADOR — Datos is a marketing research firm located in Quito with a field office in Guayaquil. The consultant met with Sr. Luis Subia, executive manager of the firm. Datos, which has affiliated offices in Venezuela and Mexico, has been conducting research in Ecuador for five years. Sr. Subia has ten years experience in the field and has worked with USAID and APROFE in health, education and family planning studies. Sr. Subia stated that Datos has had experience in conducting studies among both urban and rural populations, including Indians.

Sampling — Datos currently draws its samples from a series of maps the firm has developed, using its own studies and other resources. Maps of urban areas are primarily based on statistics provided by the electric

*Omnibus studies are shared among a number of clients to keep costs low, with each client including questions in the survey instrument.

company and various banks. Maps of rural areas are drawn from aerial photographs provided by the Military Geographic Institute. Datos draws samples from these maps in the same manner that census tract maps are utilized. Sr. Subia stated that a rural sample drawn in this manner would be 40 percent Indian and 60 percent mestizo. Datos also has the capability to sample pharmacies, boticas, droguerias, and tiendas in both urban and rural areas. Beginning in October, a monthly audit will be conducted in 50 pharmacies each in Quito and Guayaquil.

Interviewers — Datos has a staff of 31 interviewers who are mainly students in the areas of economics and statistics.

Quantitative — Datos appears to be primarily oriented toward quantitative survey research. The firm has the capability to code both open and closed-ended questions. All data processing is done in-house. A quantitative study with a sample size of 2,000 - 2,400 would cost approximately \$24,000 - \$27,000. A retailer study with a sample of 300 was quoted at approximately \$5,000.

Qualitative — Sr. Subia stated that Datos has the capability to conduct focus group research. Datos brings in psychologists from neighboring Latin American countries to moderate. Sr. Subia expressed some reservations about the analysis of qualitative research related to a CSM program, since the subject is sensitive and complex, and Datos has no one on permanent staff with related experience. An estimate of approximately \$500 per group was given.

McCANN-ERICKSON — McCann-Erickson is the largest advertising agency in Ecuador.

Qualitative — McCann maintains an in-house research department which fulfills the firm's qualitative research needs. Srta. Pilar Adell, director of the department, has a background in psychology and is experienced at moderating product-related focus groups. McCann's experience has so

far been confined to the major urban areas, with no experience among rural or Indian populations. An estimate of \$550 per group was given.

Quantitative — Sr. Diego Maruri, president of McCann Erickson, told the consultant that the firm subcontracts its quantitative research needs, working primarily with Datos Ecuador.

- o NORLOP — Norlop, soon to be acquired by J. Walter Thompson, is the second largest advertising agency in Ecuador. Sr. Francisco Sola, president of Norlop, told the consultant that Norlop does not maintain an in-house research department and therefore he subcontracts the firm's research. Sr. Sola stated that Norlop has worked primarily with Datos for quantitative studies and Mercaplan for qualitative studies. He expressed satisfaction with the work of both firms.
- o GALLUP DEL ECUADOR — Gallup del Ecuador is a research organization which specializes in market research and public opinion studies. The firm is affiliated with the Gallup International Research Institute based in Princeton, New Jersey. The consultant met with Sr. Julio Perrone, president, and Sr. Fabian Yopez, vice president of the firm.

Sampling — Gallup del Ecuador utilizes the 1974 census, with extrapolation to 1981, as the sampling frame for the firm's studies. Gallup has the ability to sample both urban and rural populations. Sr. Perrone stated that all but the most dispersed 15 percent of the rural populations would be included in the sampling frame. Gallup also has the capability to draw a sample of pharmacies, boticas, droguerias and tiendas.

Interviewers — Gallup employs 450 interviewers throughout Ecuador. The majority of interviewers are students. The interviewers are evenly split between men and women with a number of each speaking the appropriate indian dialects.

Quantitative — Gallup del Ecuador has been conducting quantitative research in Ecuador for over 11 years. Gallup is experienced in

conducting both product-related and social science research in urban and rural areas of the country. The Gallup representatives who met with the consultant appeared to be quite well informed about special issues related to survey research in Ecuador. The firm is capable of coding both open and closed ended questions. All data processing is done in-house. Sr. Perrone quoted approximately \$15,000 for a national probability study with a sample of 3,000 respondents. A retailer study with 300 respondents would cost approximately \$5,000.

Qualitative — Gallup del Ecuador also has experience conducting qualitative focus group research. Respondents are recruited in the same manner that they are recruited for a quantitative study. Sr. Perrone stated that a psychologist is brought in from Uruguay to moderate focus groups, using techniques based on clinical experience. Gallup's rates for focus group research appear to be quite high when compared to other firms; Sr. Perrone quoted \$1,100 per group.

- o MERCAPLAN — Mercaplan is a market research firm based in Quito with the capability to conduct research in urban and rural areas. The consultant met with Sr. Pablo Bergel, manager of Mercaplan.

Sampling — Mercaplan draws its samples for quantitative studies from the 1974 census, which has been updated with estimates from the government and the firm's own data. Respondents for qualitative research are recruited from neighborhoods which fall within the targeted SES guidelines. Sr. Bergel stated that Mercaplan can draw a sample of pharmacies, boticas and tiendas.

Interviewers — Mercaplan supplements its permanent interviewing staff of twelve persons with students who work on a part-time basis.

Quantitative — Mercaplan has had extensive experience conducting product related quantitative studies in Ecuador and has several major advertising agencies among its clients. A national quantitative study was quoted at approximately \$30,000 for a sample of 2,000 respondents.

A retailer study was quoted at \$4,000 - \$5,000 for a sample of 300 respondents.

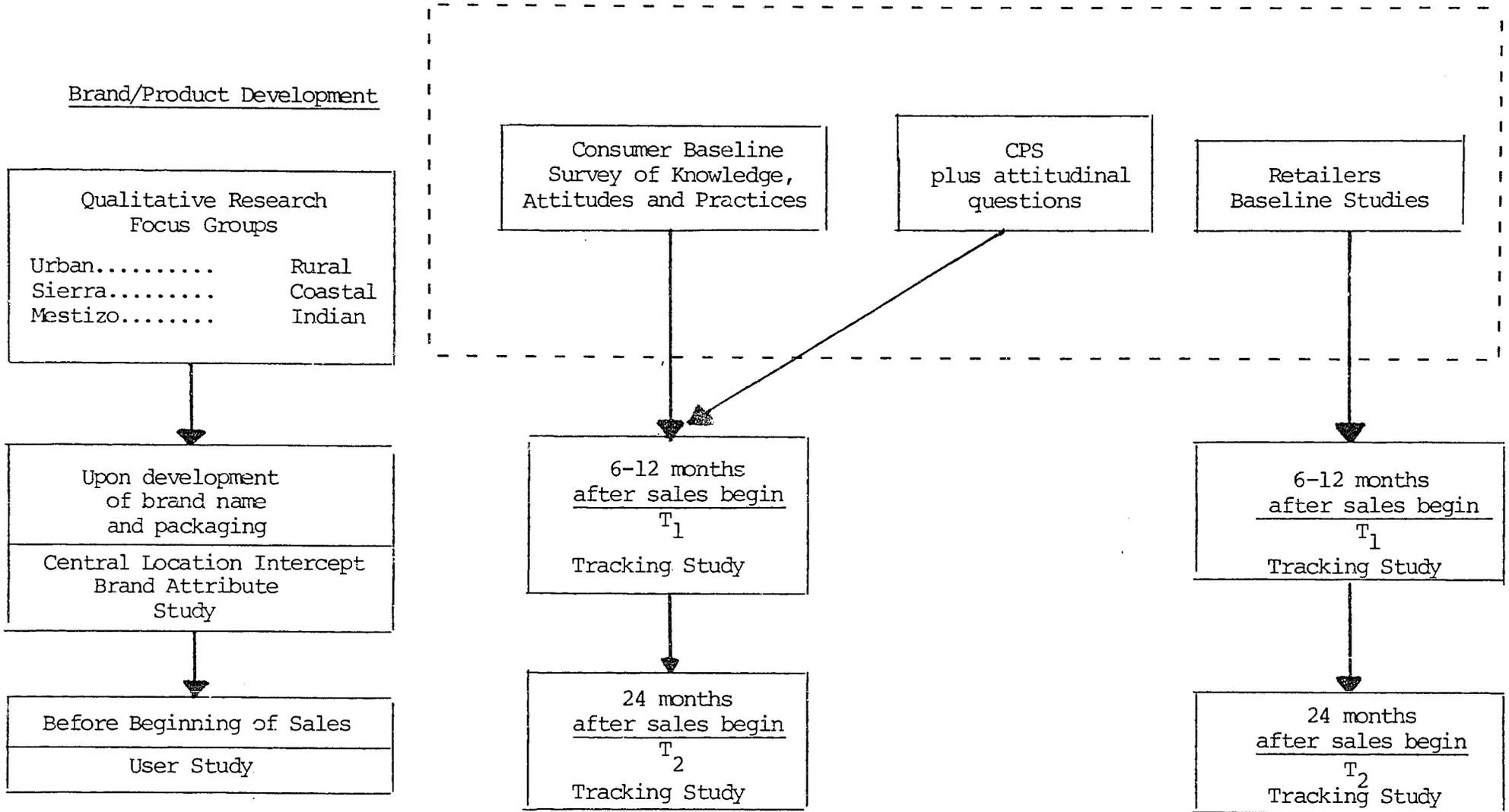
Qualitative -- Both Sr. Bergel and his wife are trained sociologists and both moderate focus group discussions. The consultant reviewed a sample of qualitative research conducted by Mercaplan and found the level of sophistication to be quite high. Sr. Bergel stated that Mercaplan is capable of conducting groups in both urban and rural areas. Rough cost estimates were \$600 per group.

V. PROPOSED MARKET RESEARCH DESIGN

Although the consultant's workscope called only for the design of that portion of the market research process necessary for project initiation, a rough plan for long-term market research has been provided. A detailed design including cost estimates, task outline and time schedule has been provided for the initial market research.

It is recommended that the market research study be conducted in two separate phases among rural and urban residents, both mestizo and Indian, in the sierra and coastal regions of the country. The following chart briefly outlines the proposed research design:

Proposed Market Research Design*



* The portion of the schematic within the dotted lines represents research which can be initiated prior to a contractor being in place.

A. Quantitative Baseline and Tracking Studies

1. Consumer Baseline Study

It is recommended that a baseline study of knowledge, attitudes and practices be conducted by an Ecuadorian market research firm. The quantitative capabilities demonstrated by the Ecuadorian market research firms appear to be strong. Hence, a minimum of technical assistance to APROFE would be required allowing the study to get underway before a contractor is in place. The quantitative study should be developed and conducted according to the following specifications:

- | | |
|----------------------|---|
| 1. Population | Men - women
Urban - rural
Sierra - coast
Mestizo - Indian |
| 2. Total Sample Size | 2000* |
| 3. Areas of Inquiry | Knowledge of contraception
Sources of information
Reasons for approval/disapproval of
contraception
Reasons for usage/non-usage
Current prices paid
Current sources of products
Demographics |
| 4. Interview Length | approximately 30 minutes |
| 5. Interview Type | Structured questionnaire with open and
closed-ended questions. |

*A sample of 2000 is recommended in order to be representative and to allow for analysis by population subgroup.

A recommended task breakdown and timetable for the quantitative study follows (from award of contract):

<u>Tasks</u>	<u>Timing</u>
1. Develop questionnaire	2 weeks
2. Pretest questionnaire	2 weeks
3. Revise and pre-code questionnaire	1 week
4. Develop sample	2 weeks
5. Data collection	4 weeks
6. Coding of open ended responses	2 weeks
7. Key punching, computer analysis	1 week
8. Data analysis	3 weeks
9. Final report	3 weeks
	—
	20 weeks

Based on rough estimates from the research firms visited by the consultant, this design should cost between \$20,000 and \$30,000. It is not clear why the estimates for this type of study are so disparate among the qualified research firms.

2. Contraceptive Prevalence Study

Fall 1981, is the target date for the national Contraceptive Prevalence Study to go into the field in Ecuador. It appears that this study, to be undertaken by Westinghouse Health Systems, will serve as an additional baseline measure of knowledge and reported practices related to contraception. It will also add useful information for market segmentation. The following is a breakdown of the areas addressed by the CPS which will directly augment the proposed market research study:

- o Consumer demographics (age, marital status, residence, education, work status, ethnic background)

- o Reproductive history and intentions
- o Availability of contraceptives
- o Reasons for non-use

The CPS is limited in scope because the sample is made up entirely of women. However, all methods of contraception are included in the possible responses, allowing the women to speak for their partners to a certain extent.

It is recommended that the CPS should be utilized to the fullest possible extent for the planned CSM market research study. The standard CPS study does not fully address attitudes toward contraception for marketing purposes. It is therefore recommended that several important attitudinal questions be tagged onto the CPS questionnaire. Recommended subject areas for attitudinal questions include the following:

- o Approval/disapproval of family planning for spacing births/limiting family size.
- o Perceptions of partner's approval/disapproval of family planning.
- o Perceptions of ease/difficulty/safety of family planning methods.

3. Retailers Baseline Study

It is recommended that, concurrent with the consumer baseline study a quantitative survey be conducted among a sample of 300 retailers: 120 pharmacists, 60 botica operators 60 drogueria operators and 60 tienda owners. This study will build on existing syndicated data available on current distribution and pricing of contraceptives.* This survey should address the following areas of inquiry:

*Although it appears that CSM oral contraceptives will not be distributed outside of pharmacies, boticas and droguerias tiendas would be possible points-of-purchase for other types of contraceptive products.

- o Level of contraceptive knowledge
- o Role in contraceptive screening and counseling
- o Customer profile
- o Willingness to carry new products
- o Reaction to counter display
- o Prices and profit margin
- o Competition

The survey among retailers would be developed and conducted according to the following specifications:

- | | | |
|----|-------------------|--|
| 1. | Population | Pharmacists - 120
Botica operators - 60
Drogueria operators - 60
Tienda owners - 60 |
| 2. | Total Sample Size | 300 |
| 3. | Geographic Area | Urban sierra
Rural sierra
Urban coastal
Rural coastal |

A recommended task breakdown and timetable for the survey follows:

<u>Tasks</u>	<u>Timing</u>
1. Develop questionnaire	2 weeks
2. Pretest questionnaire	1 week
3. Revise and pre-code questionnaire	1 week
4. Develop sample	2 weeks
5. Data collection	5 weeks
6. Coding of open-ended responses	1 week
7. Key punching, computer analysis	1 week
8. Data analysis	2 weeks
9. Final report	1 week
	—
	16 weeks

Based on estimates from those firms capable of sampling retailers, the cost for this study should be approximately \$5,000.

4. Consumer and Retailer Tracking Studies

As outlined above, baseline studies among consumers and retailers would be conducted as soon as the RFP is released and a contract is awarded to a market research firm. It is projected that this research could be conducted before a U.S. contractor has been selected. These baselines are necessary for CSM program planning and it would be advantageous to conduct the research as soon as possible. Later, approximately 6-12 months after the CSM products are introduced (i.e. 12-18 months after the baseline studies), it will be necessary to conduct tracking studies to measure progress, make necessary mid-course corrections in the marketing program, and for replanning. The tracking studies would provide information in the following areas:

- o Brand and communication awareness and readiness stages
- o Buying patterns (trial, usage, repurchase rate, loyalty status (brand, method), discontinuation)

- o User and non-user profiles (demographic, geographic, attitudinal/lifestyle)
- o Satisfaction/dissatisfaction

Based on market and CSM program conditions, a second tracking study would be conducted 12-18 months after the first.

B. Product/Brand Development Research

1. Qualitative Focus Group Research

The first step in this phase of the consumer study would be qualitative, focus group research which would begin after the contractor is in place. This study would be basic, formative product/brand development research which would probe the following areas among users and non-users:

- o Understandings and misconceptions related to contraception
- o Product line
- o Alternative product positionings
- o Product brand names
- o Product features (e.g. perceived efficacy and side effects, color, usage)
- o Pricing
- o Package designs, directions, sizes
- o Preferred outlets

- o Communication concepts

In addition, prior research from other countries with a CSM program in progress might be used as a source for developing preliminary concept statements and product packaging which could be tested formatively in the focus group setting.

Ecuador is a diverse country both in terms of population and geography. These differences could effect patterns of acceptance and consumption and therefore need to be investigated as fully as possible. It is suggested that all major demographic segments be included in qualitative research in the sierra region. However, to keep costs to a minimum without sacrificing too much information, focus groups would be held only among non-users in the coastal region. Only one focus group would be held for each demographic segment in the coastal area as long as no wide differences are found between sierra and coastal respondents. If major differences emerge, a second group will be held for each necessary segment in the coastal region.

Focus groups would be held only among the two major Indian tribal groups in the rural sierra region. This strategy is suggested because the rural sierra region is the area where most of the indian population dwells, and because indians who have become urban dwellers will most likely have adopted many of the values and attitudes of urban mestizos of the same socio-economic status.

All respondents would be in the targeted income range of approximately \$200 - 400 yearly total household income. In order to keep the number of groups at a minimum, respondents would not be separated by age. Thus, each focus group will have a variety of ages within the fertile age range.

The following is a tentative design suggested for the focus group research:

Proposed Qualitative Research Design
Focus Groups - Mestizos

	<u>Urban - Sierra Users</u>	<u>Urban - Sierra Non-users</u>	Total
Men	1 group	2 groups	3
Women	$\frac{1}{2}$	$\frac{2}{4}$	$\frac{3}{6}$

	<u>Rural - Sierra Users</u>	<u>Rural - Sierra Non-users</u>	Total
Men	1 group	2 groups	3
Women	$\frac{1}{2}$	$\frac{2}{4}$	$\frac{3}{6}$

	<u>Urban - Coastal Users</u>	<u>Urban - Coastal Non-users</u>	Total
Men	1 group	1 groups	2
Women	$\frac{1}{2}$	$\frac{1}{2}$	$\frac{2}{4}$ *

Total $\overline{16}$

*This total could be expanded to 8 groups if wide differences are found among sierra and coastal respondents.

Focus Groups - Indians*

Rural Sierra Aucas Tribe
Non-Users

Men	2	groups
Women	$\frac{2}{4}$	

Rural Sierra Cofanes or Jifaros Tribe
Non-Users

Men	2	groups
Women	$\frac{2}{4}$	

Total	$\bar{8}$	groups
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Total Mestizo groups	16
Total Indian groups	$\frac{3}{24}$
Total all groups	

*Respondents would be restricted to those Indians who speak Spanish, as currently it appears there are no focus group moderators who speak Indian dialects available to conduct qualitative research in Ecuador. If USAID/Quito and APROFE consider it important to conduct these sessions in the appropriate Indian dialects and can identify potential moderators, these individuals could be trained to conduct focus group sessions (as is being done in Haiti and Egypt).

Based on rough cost estimates provided by the market research firms visited, it appears that the qualitative research will average about \$600 per group, for a total of approximately \$14,400. It is likely, however, that focus groups among indians will be more expensive, raising overall costs somewhat for the qualitative research.

Qualitative research has not reached the level of sophistication in Ecuador that quantitative research has attained. This conclusion is based on conversations with appropriate personnel in each firm and a perusal of studies which were made available. Datos Ecuador and Mercaplan have both had experience with both urban and rural populations and appear capable of conducting the groups. Pronos and McCann Erikson have not had rural experience but both have had experience conducting urban groups. Gallup del Ecuador appears to charge more than double the rates quoted by the other firms for focus groups, but Gallup appears capable of both urban and rural focus group research. It appears that the qualitative research can be conducted by an in-country firm, but it is recommended that sufficient technical assistance be provided to oversee the recruiting, moderating and analysis of group sessions. This assistance is necessary to insure that the research is conducted in enough depth to provide useful feedback for the marketing plan.

A recommended task breakdown and timetable for the qualitative focus group research follows:

<u>Tasks</u>	<u>Timing</u>
1. Development of focus group guidelines	1 week
2. Conduct 24 group discussions	6 weeks
3. Conduct extra groups if necessary	1 week
4. Analyze results	2 weeks

	10 weeks

2. Brand Attribute Study

The second step in the product/brand development phase of the market research would take place as soon as the product names and packaging are chosen and creative concepts have been developed. The purpose of this research would be to confirm the results of the formative focus group research before the CSM program goes into full operation. The method would be central location intercept interviews among men and women in the targeted SES groups.

3. User Panel Study*

It is recommended that in-home panels of users be recruited prior to full retail introduction of the products. Men and women (current users, previous users, non-users) in the targeted SES group would be recruited (probably through pharmacists and physicians) and given a three-month supply of contraceptives free of charge. Participants would be interviewed at monthly intervals to assess their reactions to the particular

*User panel studies can provide much valuable information to program planners; however, careful consideration should be given to the scale of the study (i.e. testing all, one or two of the CSM products) because a large scale study can be logistically difficult to administer.

contraceptive they chose to use. The purpose of the user panels would be to look for problems with comprehension, usage, directions, satisfactions, etc. in actual usage conditions that were not revealed in earlier phases of the market research, but that might lead consumers to stop using the product. Problems with comprehension of directions and satisfaction with the product could be addressed before actual sales to the public begin.

In addition to revealing problems with comprehension and satisfaction, user panel methodology can also address the issue of perceived product benefits among consumers. This goal is accomplished by exposing user panel members, at the start of their participation, to a concept statement which highlights product benefits. When the panel is concluded members would be asked how the benefits they perceived from actual product usage compare to the benefits promised in the concept statement. Difference would be revealed prior to a full scale advertising campaign going into the field.

This type of user panel study also has an economic advantage in that once recruitment and training has been completed, the interviewing costs would be less than if a new sample had to be recruited each month. The study would allow program planners to develop a qualitative description of regular and occasional users as well as the characteristics of consumers who stop using the product. Although not quantitative in nature, these consumer profiles would provide valuable directional information for determining and planning marketing strategies.

VI. OUTLINE OF RFP FOR MARKET RESEARCH

The following outline is suggested for the request for proposal (RFP) to be issued by APROFE for the initial phases of the marketing research. The quantitative consumer and retailer baseline studies could go into the field prior to an outside contractor coming onto the project. However, technical assistance should be

available to APROFE for developing the RFP and assessing responses. Technical assistance should also be available to provide direction for the consumer and retailer baseline study questionnaires and data analysis.

Recommendations have been made for both immediate and longer term research. Consumer and retailer baseline studies are badly needed in the absence of useful projectable information and given the limitations of the CPS. Initiating the baseline studies before a contractor is in place will provide an advantage in that program planning can be guided by the results of these studies.

The qualitative phase of the market research requires a greater degree of technical assistance than the quantitative. Therefore, this phase of the research should not be initiated until a contractor is in place.*

Although quantitative and qualitative research is included in the RFP, it should be made clear that a firm is free to respond only to the quantitative or qualitative, or to both phases of the research. Teaming, where two separate firms would work together on the project, would not be precluded.

RFP OUTLINE

A. Background Statement

1. Brief description of current family planning programs in Ecuador.
2. Description of CSM potential and prospects.
3. Statement of need for market research study.

B. Purposes of the Study

1. To update and build upon existing studies available on family planning in Ecuador.

*It is possible that a market research firm would not be needed to conduct the qualitative research if the program staff (contractor and APROFE) were to be trained to conduct this research themselves (as is being done in Haiti and Egypt).

2. To serve as the basis for the CSM marketing plan and program development.
3. To provide a baseline for measuring progress over time.

C. Populations To Be Studied

1. Quantitative

- a. Consumer Baseline Study
 - o representative sample (n=2000)
- b. Retailer Baseline Study
 - o pharmacists (n=120)
 - o botica operators (n=60)
 - o drogueria operators (n=60)
 - o tienda owners (n=60)

2. Qualitative

- a. Mestizos* (16 focus groups)
- b. Indians** (8 focus groups)

D. Study Design

1. Quantitative

- a. Consumer Baseline Study tentative design (see section V.A.)
- b. Retailer Baseline Study tentative design (see section V.A.)
- c. Request for agreement with tentative design or proposed revisions, with justification for either.

*See page 17 of this report for a complete breakdown of Mestizo focus group respondents.

**See pge 18 of this report for a complete breakdown of Indian focus group respondents.

2. Qualitative

- a. Focus group tentative design (see section V.B.)
- b. Request for agreement with tentative design or proposed revision with justification for either.

E. Proposed Steps To Be Followed In Study Implementation To Include:

1. Quantitative

- a. Review of literature/extant research
- b. Development of survey instruments for quantitative research (Consumer and Retailer Baseline Studies)
- c. Sampling plan, design, sizes
- d. Pretesting of survey instruments
- e. Plan for data coding, tabulation, analysis, reporting
- f. Data collection procedures, e.g., interviewer training, supervision, interview validation, etc.
- g. Presentation of study finding, conclusion, indicated action.

2. Qualitative

- a. Review of literature/extant research
- b. Procedures for selecting, recruiting focus group respondents
- c. Proposed moderators
- d. Preliminary moderator's guidelines
- e. Analysis/reporting of focus groups

- F. Proposed Budget
- G. Proposed Timetable/Schedule of Events
- H. Personnel Proposed - Experience Background
- I. Organization Experience And Capabilities

VII. SOURCES OF INFORMATION

A. Publications

Luzuriaga, Carlos C., "The Situation of the Woman in Ecuador." A reference study for the Agency for International Development, 1979.

Scrimshaw, Susan C., "Preliminary Report of the Intensive Phase of the Study of the Importance of Fertility in the Socio-Economic Adaptation of Urban Immigrants in Guayaquil, Ecuador." Division for Program Development and Evaluation, International Institute for the Study of Human Reproduction. Columbia University, 1973.

B. Persons Contacted

Anna Maria Sarmiento -- Marplan (N.Y.)

Dr. Paolo Marangoni - APROFE

Horacio Roig
Research Director - PRONOS

John Sombrailo - AID-Ecuador

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Manuel Rizzo - AID-Ecuador

Julio Perrone
President - Gallup del Ecuador

Fabian Yepez
Vice President - Gallup del Ecuador

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12 de Octubre 622 5to Piso

Quito, Ecuador

MERCAPLAN C. LTDA.

Orellana 360

Quito, Ecuador

This report covers each of these workscope areas, and includes recommendations. Prior to the consulting trip to Ecuador, a briefing was held with Mr. Arthur Danart of AID and Ms. Betty Ravenholt and Ms. Gail Washchuck of the Futures Group.

III. PRIOR RESEARCH

Few studies are available in Ecuador which would contribute relevant marketing information on knowledge, attitudes and behavior related to contraception. Information was sought from APROFE and USAID/Quito which has access to studies conducted by the Ministry of Health. The research studies which have been conducted seem to point to an openness and desire among Ecuadorian women to learn more about contraception. No sources were found which referred specifically to men and family planning in Ecuador.

A study conducted by Scrimshaw (1973) among urban immigrants in the city of Guayaquil revealed a high level of general knowledge of contraception among this group. Eight of ten women surveyed said they knew about contraception with about one of twenty stating that they were actually taking the pill. Over a third of the women interviewed felt that sterilization of the female was a good approach to contraception. Scrimshaw found that, although the methods used were not always the most effective, nearly half of the women had taken some measure to try to prevent pregnancy.

The Ministry of Health conducted a study among rural areas in 1977 and found that nine of ten women surveyed believed that it was a bad idea to give birth to children spaced too closely together. In addition, about half of respondents from the sierra and two-thirds from the coast said they would like to take some measure that would prevent them from having any more children. The most frequently cited reasons for being in favor of family planning were related to economics and simply not wanting any more children.

Those women from the sierra who said they were not interested in family planning most often said it was because they felt the methods were too new. Coastal women were most likely to say they were not interested in contraception because "they had no need due to their age."

In 1977, APROFE surveyed its client population in an attempt to create a profile of their characteristics. While little information was revealed which directly related to attitudes toward contraception, it was found that the most frequent primary sources of information on the subject were female friends and relatives.

Clearly, more research on the subject is needed before an effective Contraceptive Social Marketing program can be planned. Both Dr. Paolo Marangoni of APROFE and Sr. Manuel Rizzo of USAID/Quito expressed interest in, and support of, market research which would provide direction for a CSM program in their country.

IV. MARKET RESEARCH FIRMS BASED IN ECUADOR

The consultant's workscope included an assessment of market research capabilities in Ecuador. The results of this assessment show that the capability to conduct qualitative and quantitative research currently exists, although a qualitative study appears to require a greater degree of outside supervision. Discussions were held with representatives of independent research firms and major advertising agencies which conduct marketing research. A description of each firm and its capabilities follows, in the order in which the firms were visited:

- o MARPLAN — Prior to departure for Ecuador, a telephone conversation was held with Ms. Anna Maria Sarmento of Marplan, a New York based international marketing research firm. Ms. Sarmento reported that Marplan does not maintain permanent research capabilities in Ecuador, but subcontracts to local firms. She said she is familiar with Datos Ecuador and Pronos. She added that it should not be difficult to conduct quantitative research using a local firm but that she does not know of a local firm who is adept at qualitative research.
- o PRONOS — Pronos is a marketing research firm located in Quito with a field office in Guayaquil. Sr. Horacio Roig, research director, met with the consultant and outlined the firm's capabilities.

Sampling — Pronos currently employs the 1974 census as the sampling frame for quantitative studies. Respondents for qualitative research are

recruited on a house-to-house basis, once neighborhoods are identified as containing the target SES group.

Interviewers — Three supervisors in Quito and three in Guayaquil are employed on a full-time basis. Part-time interviewers are hired as needed in each major urban area.

Quantitative — It appears that the majority of the firm's experience lies in product-oriented quantitative market research in Quito and Guayaquil. The firm has had no experience in conducting research among rural populations. Pronos currently conducts a monthly omnibus panel* of 820 households each in Guayaquil and Quito. Cost estimates for a quantitative study ranged from \$10,000 to \$12,000 for a sample of 800 respondents.

Qualitative — Sr. Roig stated that Pronos has had experience conducting product related focus group research among urban respondents. The firm has had no experience conducting qualitative research among rural populations. Groups can be videotaped if desired. An estimate of \$500 per group was given.

- o DATOS ECUADOR — Datos is a marketing research firm located in Quito with a field office in Guayaquil. The consultant met with Sr. Luis Subia, executive manager of the firm. Datos, which has affiliated offices in Venezuela and Mexico, has been conducting research in Ecuador for five years. Sr. Subia has ten years experience in the field and has worked with USAID and APROFE in health, education and family planning studies. Sr. Subia stated that Datos has had experience in conducting studies among both urban and rural populations, including Indians.

Sampling -- Datos currently draws its samples from a series of maps the firm has developed, using its own studies and other resources. Maps of urban areas are primarily based on statistics provided by the electric

*Omnibus studies are shared among a number of clients to keep costs low, with each client including questions in the survey instrument.

Focus Groups - Indians*

Rural Sierra Aucas Tribe
Non-Users

Men	2	groups
Women	$\frac{2}{4}$	

Rural Sierra Cofanes or Jifaros Tribe
Non-Users

Men	2	groups
Women	$\frac{2}{4}$	

Total	$\bar{8}$	groups
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Total Mestizo groups	16
Total Indian groups	$\frac{8}{24}$
Total all groups	

*Respondents would be restricted to those indians who speak Spanish, as currently it appears there are no focus group moderators who speak indian dialects available to conduct qualitative research in Ecuador. If USAID/Quito and APROFE consider it important to conduct these sessions in the appropriate Indian dialects and can identify potential moderators, these individuals could be trained to conduct focus group sessions (as is being done in Haiti and Egypt).

available to APROFE for developing the RFP and assessing responses. Technical assistance should also be available to provide direction for the consumer and retailer baseline study questionnaires and data analysis.

Recommendations have been made for both immediate and longer term research. Consumer and retailer baseline studies are badly needed in the absence of useful projectable information and given the limitations of the CPS. Initiating the baseline studies before a contractor is in place will provide an advantage in that program planning can be guided by the results of these studies.

The qualitative phase of the market research requires a greater degree of technical assistance than the quantitative. Therefore, this phase of the research should not be initiated until a contractor is in place.*

Although quantitative and qualitative research is included in the RFP, it should be made clear that a firm is free to respond only to the quantitative or qualitative, or to both phases of the research. Teaming, where two separate firms would work together on the project, would not be precluded.

RFP OUTLINE

A. Background Statement

1. Brief description of current family planning programs in Ecuador.
2. Description of CSM potential and prospects.
3. Statement of need for market research study.

B. Purposes of the Study

1. To update and build upon existing studies available on family planning in Ecuador.

*It is possible that a market research firm would not be needed to conduct the qualitative research if the program staff (contractor and APROFE) were to be trained to conduct this research themselves (as is being done in Haiti and Egypt).

2. To serve as the basis for the CSM marketing plan and program development.
3. To provide a baseline for measuring progress over time.

C. Populations To Be Studied

1. Quantitative

- a. Consumer Baseline Study
 - o representative sample (n=2000)
- b. Retailer Baseline Study
 - o pharmacists (n=120)
 - o botica operators (n=60)
 - o drogueria operators (n=60)
 - o tienda owners (n=60)

2. Qualitative

- a. Mestizos* (16 focus groups)
- b. Indians** (8 focus groups)

D. Study Design

1. Quantitative

- a. Consumer Baseline Study tentative design (see section V.A.)
- b. Retailer Baseline Study tentative design (see section V.A.)
- c. Request for agreement with tentative design or proposed revisions, with justification for either.

*See page 17 of this report for a complete breakdown of Mestizo focus group respondents.

**See pge 18 of this report for a complete breakdown of Indian focus group respondents.