

**MAP SUMMARY REPORT
PSI DASHBOARD**

**ETHIOPIA (2011): MAP STUDY EVALUATING THE AVAILABILITY
OF
PREVENTIVE CARE PACKAGE (PCP) KIT COMPONENT
PRODUCTS FOR PLHIV IN FIVE REGIONS OF ETHIOPIA
Round Two**

Sponsored by

**PEPFAR through THE UNITED STATES AGENCY FOR INTERNATIONAL DEVELOPMENT
(USAID)**



Contract #: GHH-I-00-07-00062-00

Contractor Name: Population Services International

USAID COTR: Dr. Afework Negash

Publication/issuance date: March/2009

Document Title: Ethiopia (2009): MAP Study Evaluating the Availability of PCP component Products for PLHIV in Five Regions of Ethiopia, Round two

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ACKNOWLEDGEMENTS

This research was conducted by the Research Department of PSI/Ethiopia with support from Operations and Administration sections and the Country Representative. Technical assistance was provided by Bram Piot, MAP Principal Investigator, Dr. Amy Herman Roloff, the Regional Researcher for East Africa and Girma Tadesse, PSI/Ethiopia GIS Coordinator. Fieldwork was carried out by PSI/Ethiopia research team. The study was funded with financial support from the United States Agency for International Development (USAID). A very special thanks is extended to the individuals in the outlets of the sampled kebeles who volunteered their time to respond to the questions for this survey. Finally, we extend our thanks to all our data collectors and data entry clerks.

SUMMARY

BACKGROUND: With an estimated number of about a million people infected with HIV, Ethiopia is one of the highest in the number of HIV infected people in the world. According to the projections of the 2005 calibrated point prevalence data, the adult HIV prevalence in 2009 was 2.3% (2.6% females and 1.8% males). Ethiopia's HIV/AIDS epidemic pattern continues to be generalized and heterogeneous with marked regional variations. The estimated HIV prevalence in urban and rural areas was 7.7% and 0.9%, respectively. Moreover, there were an estimated 131,145 new HIV infection and 44,751 AIDS related deaths (57% female) in 2009 alone. With the view to reducing morbidity and mortality due to opportunistic infections (OIs) among adults and children living with HIV/AIDS and to enable them to lead healthier and longer lives, PSI/Ethiopia has received a three years funding from USAID to implement the USAID Preventive Care Package (PCP) project in five regions of Ethiopia. The project aimed to achieve this goal by increasing the use of preventive care products and services by PLHAs in Ethiopia. The primary target groups of the project are adults and children living with HIV/AIDS who are aware of their HIV status.

RESEARCH OBJECTIVES: MAP studies allow programmers to make an assessment of product availability and accessibility using pre-defined criteria for coverage, quality of coverage and access. Its goal is to increase the overall efficiency of social marketing product and service delivery systems. The main objective of this second round MAP study was to (1) estimate coverage and quality of coverage of the USAID funded PCP kit components products, which include water treatment products of WhuaAgar and PUR, insecticide-treated bed nets (ITNs), condom, hand washing soap, De-worming tablet and ORS/LemLem in five target regions of Ethiopia, to (2) estimate market penetration rates of WhuaAgar, PUR, Condom, ITN, ORS, hand washing soap, De-worming tablet and ORS in the PCP project kebeles, and (3) make programmatic recommendations for future distribution strategies particularly for PSI/Ethiopia social marketed products and services.

METHODOLOGY: The Lot Quality Assurance Sampling (LQAS) method, which uses a random sample of 19 geographic areas, was used for the sample selection. Accordingly, a total of random sample of 95 kebeles, 19 per intervention region, was drawn from the 146 PCP Kit distributed areas of the five regions. A representative sample of kebeles (the smallest administrative structure in Ethiopian administrative setup) was taken from each PCP Kit distributed region with the view to see regional variations on coverage, quality of coverage and market penetration of the kit component products. In each sampled kebele, all eligible outlets (pharmacies, drug shops/stores, kiosks, and supermarkets), which are within the boundary of the sample kebele, were audited by trained data collectors to check if any of the products are made available in the intervention areas. Minimum standards were set for each product so as to estimate coverage and quality of Ethiopia, 2011

coverage of products. The quality standards were measured using the following standards: (1) product is clearly visible, (2) product is within expiry date, (3) retail price is at or below a prescribed amount, and (4) product promotional material is clearly visible.

The overall data collection process, which was conducted from April 16 to March 10, 2011, was supervised by the research staff of PSI/Ethiopia. A face-to-face interview approach was used to collect the data from the outlets in the sample kebeles. Accordingly, a total of 4,404 outlets (887 from Amhara, 970 from Oromiya, 959 from SNNPR, 680 from Tigray and 908 from Addis Ababa City Administration) were visited so as to get information for the estimation of coverage and quality of coverage of the products. For mapping purposes, the supervisors recorded the coordinates of the sample kebeles using Global Positioning System (GPS) devices. Maximum effort was exerted to maintain the quality of the data collected from the outlets. Among others, the audit sheet was made standardized and pre-tested, experienced data collectors recruited and trained, and close supervision made during data collection, each filled audit sheet was checked and edited before data entry, and followed by electronic data cleaning. A data entry structure was designed in CSPro software, and data was entered by trained data entry clerks. The dataset was exported to SPSS and analysis made using this software. All possible errors on the data (outliers, inconsistent values, etc.) were checked and corrected in SPSS before the analysis.

MAIN FINDINGS

The main findings of the study are presented as follows:

- Male condoms and hand washing soaps are available in all of the kebeles; PSI/Ethiopia's product WhuaAgar is available in most of the kebeles (in 69 out of 95 kebeles) and ORS/LemLem and De-worming tablets are available in 48 to 49 of the 95 sample kebeles (50.5% to 51.6% coverage). LLITNs and PUR are available in a smaller proportion of kebeles (in only 6 and 22 of 95 kebeles, respectively).
- WhuaAgar is available in nearly all kebeles in Addis Ababa followed by SNNPR and Oromiya compared with the other regions. The availability of DDe-worming tablets and ORS is high in Tigray region, where 14 out of 19 kebeles are covered with the products, compared to the other regions.
- Quality of coverage rates is relatively good for many of the products (WhuaAgar, condom, hand washing soap, De-worming tablet and ORS) for all of the minimum quality standards, except for presence of promotional materials. Rates are low for PUR, where the quality of coverage ranges from 0 to 20 out of 19 kebeles, and LLITNs where 3 to 6 out of 19 kebeles meet the minimum standards of quality of coverage.
- Quality of coverage of PSI/Ethiopia's products was found to be low (3.2% to 32.6% for WhuaAgar and 0.0% to 21.1% for PUR). The rates are low across regions. This means that adherence to recommended buying and selling prices of the products is low. In terms of presence of promotional materials, condom has high quality of coverage (57.9%, or 55 out of 95 kebeles) but it is low for the remaining products. It was observed that all of the products except PUR and ITN were relatively

visibly displayed to customers (44.2% to approximately 100.0% quality of coverage). The occurrence of stock outs appears to be very limited.

- Some expired PSI/Ethiopia products were found in some kebeles during the audit. Moreover, the findings show that WhuaAgar and PUR products are within expiry dates in 66 and 20 outlets out of the 95 kebeles, respectively. This means that there are more PUR products expired in the market than WhuaAgar.
- The market penetration rates of PCP Kit component products varied both by outlet type and by region. Among the seven products covered by the survey, De-worming tablets, hand washing soap, and ORS/LemLem are available in the majority of the outlets- 97%, 95% and 93%, respectively. The lowest penetration rate was recorded for ITN. ITN was found only in 0.3% of the outlets in the malarious areas surveyed.
- Penetration of male condoms is fairly low (about 35%). It was observed during the data collection process that most outlets owned by Muslims do not stock condoms due to reasons associated with religion. The number of health outlets stocking male condoms ranges from 90% to 96% whereas the rate for kiosks and supermarkets ranges from 31% to 33%.
- The penetration rate of PSI/Ethiopia products was found to be low, i.e., 12% for WhuaAgar and 2% for PUR. It means that it is uncommon to find these products in many of the outlets in the surveyed areas. Results disaggregated by outlet type show that WhuaAgar and PUR are found more in health outlets (pharmacies and drug stores) than in other outlet types.
- There is regional variation in terms of market penetration of WhuaAgar, PUR, and condom. No major variation was observed for hand washing soap, De-worming and ORS. More outlets stocked WhuaAgar in Addis (22%) followed by SNNPR (13%) compared with the other regions. A greater proportion of outlets in Tigray stocked condom (45%) followed by Amhara (39%) compared with the other regions. The lowest proportion of outlets stocking condom was found in Addis Ababa (30%).

Other Findings

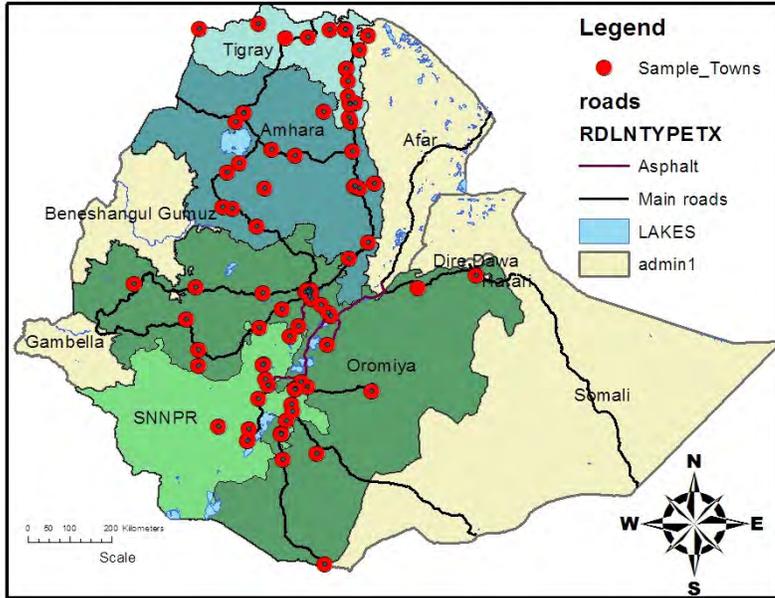
- The survey found out that there are two non-PSI/Ethiopia water treatment products in the surveyed areas competing with PSI/Ethiopia water treatment products. These products are Aquatab and Bishangarie. However, the market penetration rate of these products is very low (4%, or 187 of the total outlets audited) compared with WhuaAgar (12%). These two products are available in pharmacies and drug stores compared with the other outlet types.
- Relatively few outlets have the intention to stock PSI/Ethiopia products- 38% for WhuaAgar and 25% for PUR. On the other hand, most of the outlets (96% to 98%) are willing to stock ORS, hand washing soap, and De-worming. The main reason for not intending to sock these products were reported to be insufficient demand (94%).
- Private wholesalers are the main suppliers of many of the PCP Kit component products. PSI sales representatives and private wholesalers are the main suppliers of PSI/Ethiopia products- 46% and 30% for WhuaAgar and 37% and 38% for PUR. NGOs are the main suppliers of condom and ITN. It was found that 63% of the outlets selling condom and 36% of the outlets stocking ITN were supplied condom and ITN from NGOs.

PROGRAMMATIC RECOMMENDATIONS

The following key considerations relevant to strengthen the current status of PCP Kit component products social marketing system are forwarded.

- The current coverage and market penetration of PSI/Ethiopia products are fairly low to average and relatively few outlets have the intention of stocking these products mainly due to insufficient demand for the products. Efforts should, therefore, be made to maintain high coverage and market penetration rates of WhuaAgar and PUR, and also availability of other products across the surveyed areas.
- PSI/Ethiopia sales representative's visit to the retail outlets was found low; however, sales team visits to outlets could help the program in monitoring the stock outs and expiry dates of PSI/Ethiopia's water treatment products.
- Demand creation activities such as brand campaign, customer education activities and information campaign should pay special attention to promote products and raising awareness among target population about the benefit of the products.
- The survey has found some expired products, including WhuaAgar and PUR, in some outlets. As this will worsen the lack of demand for the products, there is a need to make the outlets aware to destock the expired products.
- Price adherence for WhuaAgar and PUR was found to be low. PSI/Ethiopia social marketing unit should decide either to adjust the recommended retail price, or find ways to improve price adherence for these products through regular supervision of wholesalers and retailers, and create awareness through advertisement campaign through mass media of the recommended price.
- The quality of coverage for many of the products was found to be low for presence of promotional materials minimum standard. Given the importance of promotional materials in increasing the number of customers, efforts need to be exerted towards making available promotional materials and improve the visibility for PSI/Ethiopia products and increase the frequency of sales representatives' visits to the outlet types.
- PSI/Ethiopia sales teams should continue to monitor and supervise outlets engaged in stocking PSI/Ethiopia products so as to maintain and adjust the price of these products.

Location of Randomly Selected Kebeles from BPCP KIT Distributed Towns



Date-->May, 2011 Source---> PSI/Ethi. GIS

I. COVERAGE OF PCP Kit Components

Table 1: PCP Kit Component Coverage by Intervention Region

Study Region	Number of Kebeles	Kit Component Product						
		WhuaAgar	PUR	Male condom	HWS	ORS/LemLem	De-worming	ITN
Amhara	19	9(+)	6(+)	19(+)	19(+)	6(+)	6(+)	1(+)
Tigray	19	9(+)	2(+)	19(+)	19(+)	14(+)	14(+)	0(-)
Oromiya	19	16(+)	6(+)	19(+)	19(+)	11(+)	11(+)	2(+)
SNNPRS	19	16(+)	6(+)	19(+)	19(+)	9(+)	10(+)	3(+)
Addis Ababa	19	19(+)	2(+)	19(+)	19(+)	8(+)	8(+)	NA
Total	95	69	22	95	95	48	49	6
%		72.6	23.2	100.0	100.0	50.5	51.6	6.3

*The '+' ('-') signs indicate that the study region is at/above(below) the minimum standard of kebeles with at least two outlets (one outlet for ITN) with the product available.

Coverage of WhuaAgar: WhuaAgar was found 69 of the 95 kebeles stocked WhuaAgar. The findings show that out of the 19 kebeles sampled in each region, 9 in Amhara and Tigray, 16 in Oromiya and SNNPR, and 19 in Addis have at least two outlets with WhuaAgar. As indicated in Table 1, Addis Ababa has the highest coverage level with 19 out of 19 kebeles covered with WhuaAgar compared to the other four regions where 9 to 16 of the 19 kebeles were covered with the product. Table 1 shows the number of kebeles per region with at least two outlets stocking WhuaAgar.

Coverage of PUR: PUR was found in only 22 of the 95 kebeles. As indicated in Table 1, the coverage of PUR for each of the five sampled regions is low. Tigray and Addis Ababa have the lowest coverage level with 2 out of 19 kebeles covered with PUR compared with the other regions where 6 out of 19 kebeles covered with the product.

Coverage of Condoms: Coverage of condoms is high in all regions, i.e., all sample kebeles meet the minimum standard of at least two outlets stocking any brand of male condom. No variation in condom coverage was observed across regions. This shows that condom is available in outlets and clients can easily access the product.

Coverage of Hand Washing Soap (HWS): This study considered all types of hand washing soaps that are available in the market. Like condoms, the coverage for soap is high for all regions (Table 1). That is, soap is found in at least two outlets of all the sampled kebeles. There is no regional variation in coverage of the product.

Coverage of ORS/LemLem: Table 1 shows that ORS/LemLem is present in 50.5% of the sample kebeles. The coverage of the product ranges from 6 of the 19 kebeles in Amhara region to 14 of the 19 kebeles in Tigray region.

Coverage of De-worming Tablet: The proportion of kebeles with at least two outlets with De-worming tablet was found to be about 51.9%. Regional comparison shows that the number of kebeles with the product is low

(6 out of 19) in Amhara and the highest is in Tigray region where 14 out of 19 kebeles are covered with De-worming tablets. The coverage of De-worming tablet is similar to that of ORS/LemLem.

Coverage of Insecticide Treated Nets (ITN): Some 46 kebeles (about 60.5% of the total sample kebeles in the four regions, excluding Addis Ababa) were found to be malarious and expected to sell LLITNs. Unlike the other PCP kit component products, a different minimum standard was set for ITN: availability of ITN in at least one outlet per kebele in malarious areas. Accordingly, the coverage for ITN was found to be about 6.3%. LLITN was found in only 6 of the 46 kebeles in the malarious areas (Table 1). Among all the sampled kebeles in the malarious areas of the regions, only one, two, and three kebeles in Amhara, Oromiya, and SNNPR, respectively, were found to stock ITN. This may be due to the fact that free LLITNs are being aggressively distributed by the government and most of the respondents are not aware that ITNs can be sold in kiosks and believe that they have to be stocked in pharmacies.

II. QUALITY OF COVERAGE OF PCP KIT COMPONENTS

Table 2: WhuaAgar Quality of Coverage by Intervention Region

Study Region	Number of Kebeles	Visibility	Recommended Buying Price of Retailers	Promotion	No Stock-Outs	Within expiry date	Recommended Selling Price of Retailers
Amhara	19	7(+)	0(-)	2(+)	9(+)	8(+)	1(+)
Tigray	19	16(+)	3(+)	1(+)	8(+)	7(+)	4(+)
Oromiya	19	15(+)	0(-)	4(+)	15(+)	16(+)	8(+)
SNNPRS	19	9(+)	0(-)	3(+)	10(+)	16(+)	8(+)
Addis Ababa	19	18(+)	0(-)	10(+)	15(+)	19(+)	10(+)
Total	95	65	3	20	57	66	31
%		68.4	3.2	21.1	60.0	69.5	32.6

*The '+'('−') signs indicate that the study region is at/above(below) the minimum standard of kebeles with at least two outlets (one outlet for ITN) with the product available and the minimum quality of coverage measure present.

Quality of Coverage of WhuaAgar: As indicated in Table 2, quality of coverage ranges from 3.2% for minimum quality standards of buying price of the product to 'within expiry date' of the WhuaAgar (69.5%). The finding shows that visibility of the product, product within expiry date, and no stock out obtained high individual score. Visibility of the product was found to be high in Addis Ababa (with 18 out of the 19 kebeles with the product, visibly displayed the product to customers) and the least visibility was observed in Amhara region where only 7 of the 19 kebeles meet the minimum standard. Overall, WhuaAgar minimum standard items were found in about all regions that are covered by the product. The quality of coverage of WhuaAgar was found to be low for the minimum standard of buying and selling recommended prices of the product.

Table 3: PUR Quality of Coverage by Intervention Region

Study Area	Number of Kebeles	Visibility	Recommended Buying Price of Retailers	Promotion	No Stock-Outs	Within expiry date	Recommended Selling Price of Retailers
Amhara	19	6(+)	0(-)	0(-)	6(+)	6(+)	2(+)
Tigray	19	2(+)	0(-)	0(-)	1(+)	1(+)	1(+)
Oromiya	19	5(+)	0(-)	0(-)	5(+)	6(+)	1(+)
SNNPRS	19	4(+)	0(-)	0(-)	2(+)	5(+)	1(+)
Addis Ababa	19	0(-)	0(-)	0(-)	0(-)	2(+)	0(-)
Total	95	17	0	0	14	20	5
%		17.9	0.0	0.0	14.7	21.1	5.3

Quality of Coverage of PUR: By all minimum standards used, quality of coverage for PUR is generally low (Table 3). Small number of kebeles meeting the minimum standard for quality of coverage was found in all of the regions. The minimum standards for PUR range from 0.0%, where no kebele satisfying the minimum standard of quality of coverage, to 21.1%, or 20 out of 95 kebeles that meet the minimum standard. During the audit, it appeared that many outlets didn't know the product. Where PUR is available, outlets usually didn't store in a visible location and display promotional materials, which is in accordance with PSI's sales strategies. Promotional items were not found in all of the outlets of all regions surveyed, which stocked the product; the product is bought and sold at prices different from that recommended by PSI/Ethiopia. Regional comparison shows that Amhara region is better in terms of visibility and within expiry date of the product.

Table 4: Condom Quality of Coverage by Intervention Region

Study Area	Number of Kebeles	Visibility	Promotion	No Stock-Outs	Within expiry date
Amhara	19	19(+)	7(+)	19(+)	19(+)
Tigray	19	19(+)	10(+)	19(+)	19(+)
Oromiya	19	19(+)	15(+)	18(+)	19(+)
SNNPRS	19	19(+)	15(+)	19(+)	19(+)
Addis Ababa	19	19(+)	8(+)	17(+)	19(+)
Total	95	95	55	92	95
%		100.0	57.9	96.8	100.0

Quality of Coverage of Condom: All sample kebeles meet similar levels for the minimum standard of quality of coverage for visibility and within expiry date. Quality of coverage of condom is high (92 of the 95 kebeles stocked the product and no stock outs observed). In other words, over 96.0% of the kebeles have at least two outlets that usually stored any brand of condom in a visible place, within the expiry date and no stock out of products. Quality of coverage is relatively low for the minimum standard of presence of promotional items (57.9%). No variation in visibility, stock out and within expiry date was observed across regions.

Quality of coverage is lower in Amhara followed by Addis Ababa where only 7 and 8 of the 19 kebeles in these regions displayed materials promoting condom. All commercially marketed condoms were considered in the study.

Table 5: Hand Washing Soaps (HWS) Quality of Coverage by Intervention Region

Study Area	Number of Kebeles	Visibility	Promotion	No Stock-Outs
Amhara	19	19(+)	4(+)	19(+)
Tigray	19	19(+)	0(-)	19(+)
Oromiya	19	19(+)	5(+)	19(+)
SNNPRS	19	19(+)	2(+)	19(+)
Addis Ababa	19	19(+)	4(+)	19(+)
Total	95	95	15	95
%		100.0	15.8	100.0

Quality of Coverage of HWS: This study considered all types of hand washing soaps that are available in the market. Quality of coverage is high both for the minimum standards of visibility and no stock out of HWS. However, rate of quality of coverage for promotional items is low, where only 15 of the 95 kebeles displayed materials promoting hand washing soap, compared to the other minimum standards. There is no regional variation observed in quality of coverage for the visibility and no stock out minimum standards. However, number of kebeles with promotional items present is high in Oromiya followed by Addis Ababa and Amhara. In Tigray, no kebele was found to have at least two outlets with the product and which displayed any promotional item for consumers.

Table 6: ORS/LemLem Quality of Coverage by Intervention Region

Study Area	Number of Kebeles	Visibility	Promotion	No Stock-Outs	Within expiry date
Amhara	19	6(+)	1(+)	6(+)	6(+)
Tigray	19	14(+)	3(+)	14(+)	14(+)
Oromiya	19	11(+)	1(+)	11(+)	11(+)
SNNPRS	19	8(+)	4(+)	8(+)	9(+)
Addis Ababa	19	7(+)	3(+)	8(+)	8(+)
Total	95	46	12	47	48
%		48.4	12.6	49.5	50.5

Quality of Coverage of ORS/LemLem: The quality of coverage of ORS/LemLem product is relatively good for the minimum standard of within expiry date (50.5%) followed by no stock out (49.5%) and visibility of the product (48.4%). Tigray is better in visibility, no stock out and within expiry date minimum standards (Table 6). Relatively good quality of coverage is recorded in Oromiya region for most of the minimum standards set for the product quality of coverage. Like the other products, quality of coverage of ORS is low for the minimum standard of promotional items- only 12 of the 95 kebeles meet the minimum standard of having at least two outlets with the product and any material promoting ORS displayed in the outlets.

Table 7: De-worming Quality of Coverage by Intervention Region

Study Area	Number of Kebeles	Visibility	Promotion	No Stock-Outs	Within expiry date
Amhara	19	5(+)	0(-)	5(+)	6(+)
Tigray	19	13(+)	0(-)	13(+)	14(+)
Oromiya	19	10(+)	2(+)	11(+)	10(+)
SNNPRS	19	8(+)	0(-)	9(+)	10(+)
Addis Ababa	19	6(+)	2(+)	7(+)	7(+)
Total	95	42	4	45	47
%		44.2	4.2	47.4	49.5

Quality of Coverage of De-worming tablet: The quality of coverage of De-worming tablet varies across the minimum standards and surveyed regions (Table 7). Quality of coverage varies from 4.2% for promotional items to 49.5% for within expiry date of De-worming tablets. Regional comparison revealed that Tigray region is better than the other surveyed regions in terms of quality of coverage for visibility, no stock out and within expiry date minimum standards of the product. Moreover, promotional items are observed in outlets of Oromiya and Addis Ababa better than the other three regions where 2 of the 19 kebeles in each region found to have kebeles with at least two outlets displaying items promoting De-worming tablets.

Table 8: LLITN Quality of Coverage by Intervention Region

Study Area	Number of Kebeles	Visibility	Promotion	No Stock-Outs
Amhara	19	1(+)	1(+)	1(+)
Tigray	19	0(-)	0(-)	0(-)
Oromiya	19	2(+)	2(+)	1(+)
SNNPRS	19	3(+)	3(+)	1(+)
Addis Ababa	19	NA	NA	NA
Total	95	6	6	3
%		6.3	6.3	3.2

Quality of Coverage of Long Lasting Insecticide Treated Net (LLITN): Quality of coverage of LLITN was found to be about 6.3% for visibility and promotional materials minimum quality standards and 3.2% for no stock out. In Tigray, no kebele was found satisfying the minimum quality of coverage standards. SNNPR has better quality of coverage followed by Oromiya in terms of the three minimum standards: visibility, promotional materials and no stock out. In all, the quality of coverage for LLITN was found to be low compared to other PCP kit component products.

III. PENETRATION OF PCP KIT COMPONENT PRODUCTS

Penetration of a product is measured as the percentage of outlets where the product is being sold. In this study, penetration is an important indicator since the coverage results are based on the penetration level of each product. The large sample size (4,404 outlets) allows for better estimates of the average penetration rates.

Table 9: Penetration of Products/Service Delivery by Intervention Region

Study Region	Number of Outlets	WhuaAgar	PUR	Male condom	HWS	ORS/Lem lem	De-worming	ITN
Amhara	887	43(4.8%)	27(3.0%)	340(38.3%)	807(91.0%)	21(91.3%)	23(100.0%)	1(0.3%)
Tigray	680	45(6.6%)	16(2.4%)	305(44.9%)	650(95.6%)	65(92.9%)	70(100.0%)	0(0.0%)
Oromiya	970	93(9.6%)	24(2.5%)	315(32.5%)	922(95.1%)	51(94.4%)	52(96.3%)	2(0.3%)
SNNPRS	959	128(13.3%)	20(2.1%)	290(30.2%)	932(97.2%)	40(90.9%)	41(93.2%)	3(0.4%)
Addis Ababa	908	200(22.0%)	7(0.8%)	270(29.7%)	884(97.4%)	45(93.8%)	46(95.8%)	NA
Total	4,404	509(11.6%)	94(2.1%)	1,520(34.5%)	4,195(95.3%)	222(92.9%)	232(97.1%)	6(0.3%)

Table 10: Market Penetration by Outlet Type

Study Region	Number of Outlets	No of outlets with BPCP Kit Components						
		WhuaAgar	PUR	Male condom	HWS	ORS/Lem lem	De-worming	ITN
Pharmacies	83	45(54.2%)	5(6.0%)	75(90.4%)	70(84.3%)	78(94.0%)	79(95.2%)	1(2.9%)
Drug stores	156	72(46.2%)	11(7.1%)	149(95.5%)	115(73.7%)	144(92.3%)	153(98.1%)	2(2.4%)
Supermarket	96	21(21.9%)	2(2.1%)	32(33.3%)	95(99.0%)	-	-	0(0.0%)
Kiosks /small shops	4,069	371(9.1%)	76(1.9%)	1,264(31.1%)	3,915(96.2%)	-	-	3((0.1%)
Total	4,404	509(11.6%)	94(2.1%)	1,520(34.5%)	4,195(95.3%)	222(92.9%)	232(97.1%)	6(0.3%)

Penetration rate of WhuaAgar: According to the above findings, on the average, WhuaAgar was found in 11.6% of the outlets visited in all the surveyed regions. Regional comparison shows that a relatively higher number of WhuaAgar is stocked in Addis Ababa followed by SNNPR than the other four regions. The least market penetration rate was recorded in Amhara region- only 4.8% of the outlets visited stocked WhuaAgar. Analysis by outlet type (Table 10) shows that WhuaAgar is available in all the outlet types. As shown in Table 10, relatively higher level of WhuaAgar is stocked in 'health outlets'- pharmacies (54.2%) followed by drug stores (46.2%). The study shows that WhuaAgar is available in supermarkets and kiosks/small shops in smaller quantity compared to the health outlets.

Penetration rate of PUR: As indicated in Table 9 above, PUR was found in only 94 (2.1%) of the retailer outlets visited in all the surveyed regions. There appear to be only small differences in terms of penetration from one region to another. Market penetration rate of the product is relatively good in Amhara(3.0%) Ethiopia, 2011

followed by Oromiya(2.5%) and SNNPR(2.4%). The lowest penetration rate was found in Addis Ababa (0.8%). In terms of outlet type, like WhuaAgar, relatively high level of PUR is stocked in drug stores (11.7%) and pharmacies (6.0%), which are termed as health outlets.

Penetration rate of Condom: The market penetration rate of condom was found to be about 34.5%, which means that some 34.5% of the total 4,404 outlets have stocked condom during the survey period. It was observed that condoms are not stocked in kiosks owned by Muslims. Few differences were obtained across the five surveyed regions. The penetration of condom was relatively higher in Tigray (44.9%) followed by Amhara(38.3%) than the other three regions surveyed. The penetration rate of the product is relatively low in Addis Ababa city administration (29.7%).The study also revealed that condom is available in all of the outlet types. Analysis by outlet type shows that condoms are better stocked in health outlets - 95.5% of the drug stores and 90.4% of the pharmacies. The least number of outlets with condom is observed in kiosks (31.1%) followed by supermarkets (33.3%).

Penetration rate of Hand Washing Soap (HWS): On average, HWS market penetration rate is about 95.3% of the outlets visited (Table 9). This is tantamount to saying that hand washing soaps are available in almost all of the outlets. There is no major variation of penetration rate across regions. The penetration rate by region ranges from 91.0% in Amhara to 97.4% in Addis Ababa and 97.2% in SNNPRS. It was found that HWS is found in all types of outlets audited. As indicated in Table 10, unlike condom, HWS is found in supermarkets and kiosks/small shops. Almost all of the supermarkets (99.0%) and kiosks (96.2%) visited have stocked hand washing soaps. HWS is also found in pharmacies (84.3%) followed by drug stores (73.7%).

Penetration rate of ORS/LemLem: At the time of the survey, ORS/Lemlem was sold, on the average, in 92.9% of the health outlets. This shows that many of the outlets (pharmacies and drug stores) are selling ORS. The market penetration rate is high in pharmacies (94.0%) followed by drug stores (92.3%). Across regions, the penetration rate of ORS ranges from 91.3% in Amhara to 94.4% in Addis Ababa (Table 9). This indicates that ORS is available in many of the health outlets.

Penetration rate of De-worming Drugs: The penetration rate of De-worming drugs is 97.1%, which is close to that of ORS/Lemlem (92.9%). ORS and De-worming tablets are found only in health outlets- pharmacies and drug stores. The result shows that De-worming tablet is commonly found in pharmacies and drug stores. Regional comparison shows that the penetration rate of the product is 100.0% in Amhara and Tigray followed by Oromiya (96.3%) and Addis Ababa (95.8%). Relatively low penetration rate was recorded in SNNPR.

Penetration rate of ITN: The penetration rate of ITN is computed considering only the outlets in the malarious areas. Accordingly, it was found that ITN is found in only 0.3% of the outlets audited. This indicates that ITN is rarely found in majority of the outlets in the surveyed regions. This is probably due to the fact that

ITN is being distributed to households in malarious areas by the government free of charge. SNNPR is relatively better in ITN penetration rate (0.4%) followed by Oromiya(0.3%). The least penetration rate was observed in Tigray(0.0%). Of the outlets visited, ITN was found to be better stocked in pharmacies (2.9%) and drug stores (2.4%). It was observed that supermarkets have no penetration rate at all.

IV. OTHER FINDINGS FROM THE RETAIL AUDIT

Intention to stock PCP Kit component products, PSI/Ethiopia sales team visit, source of supply and availability of non-PSI/Ethiopia brand products in the market, and the working hours of the outlets are some of the findings categorized under 'Other Findings'. The findings are presented as under the following headings.

4.1 Intention to stock PCP Kit Component Products

Intention to stock reflects the interest of outlet owners who indicate that they would be interested in selling the particular product in the future. In this analysis, outlets' willingness or intention to stock is summarized (Table 11). All outlets visited were asked about their willingness or intention to stock the product. The reasons for not being interested to stock the products are summarized in the following sub-section.

Table 11: Willingness or Intention to Stock BPCP Kit Component Products

Type of Product	Interest in Stocking Product	
	Yes (%)	Total Outlets
WhuaAgar	1,684(38.3%)	4392
PUR	1,084(24.7%)	4,388
ITN	150(6.8%)	2,194
Condom	2,210(50.4%)	4,381
De-worming Tablet	227(95.8%)	237
Hand washing soap	4,220(96.8%)	4,360
ORS	232(97.5%)	238

* All outlets, and not only those who run out of stock of the product, were asked to respond their future interest in stocking the products

Willingness or Intention to Stock WhuaAgar: The survey found that among all the 4,392 outlets, very few of them (38.3%) are willing to stock WhuaAgar in the future. This may be due to the misconception in many of the surveyed areas that most pipe water is clean for drinking. The finding is lower than that of the first round study (49.4%). Hence, it is recommendable to create awareness among the population about the purity of drinking water along with the distribution of WhuaAgar.

Willingness or Intention to Stock PUR: The proportion of people who are willing to sell PUR is lower than that of WhuaAgar. Only less than a quarter of the total outlets (24.7%) do have the intention of stocking PUR. The finding is much lower than the first round study (44.3%).

Willingness or Intention to Stock ITN: Only 6.8% of them are willing to stock ITN (Table 11). The finding is much lower than what was found during the first round study (25.5%) and that of PSI/Ethiopia's brands - WhuaAgar and PUR. The reasons for not stocking are summarized under the heading 'Reason for not stocking the product'

Willingness or Intention to Stock Condom: As indicated in Table 11 above, more than half of the outlets (50.4%) are interested to stock condom in the future. The proportion of outlets showing interest in condom is higher than those willing to stock WhuaAgar and PUR.

Willingness or Intention to Stock De-worming drugs: The intention to stock De-worming tablets was found to be high- about 96.0% of the total health outlets are willing to stock De-worming tablets in the future.

Willingness or Intention to Stock Hand Washing Soaps (HWSs): It was found that a large number of retailers (about 97.0% of the total outlets) are interested in stocking soap. It is indicated in the penetration table that HWSs are widely available in almost all of the outlets and majority of them are willing to stock HWSs in the future.

Willingness or Intention to Stock ORS/LemLem: The survey revealed that majority of the health outlets (97.5%) indicated their willingness to stock, which is almost similar to the findings of De-worming tablets. There is an understanding that ORS and De-worming tablets should be available at licensed drug stores and pharmacies which are mandatory in accordance to the regulation of Ethiopian Drug Administration and Control Authority (DACA).

5.2 Reasons for not intending to sell PCP Kit Component Products

Outlets who are not interested to sock any of the PCP Kit component products in the future were requested for the possible reasons/factors for lack of their willingness/ intention to stock the product(s). As outlets were allowed to list down more than one reason (**multiple response**), the number of outlets responded may appear to be high in the following result tables. The findings of the study are presented for each of the products as follows.

Table 12: Reasons for not Intending to Stock/selling WhuaAgar by Outlet Type

Reason for not stocking WhuaAgar	Type of business/outlet									
	Kiosk/Shop	%	Supermarket	%	Drug Shop/Store	%	Pharmacy	%	Total	%
Don't like to store	36	1.4	3	5.1	0	0.0	1	7.7	40	1.5
Insufficient demand	2407	94.4	54	91.5	25	96.2	9	69.2	2495	94.2
Insufficient profit	25	1.0	0	0.0	1	3.8	0	0.0	26	1.0
Misconceptions	7	0.3	0	0.0	0	0.0	0	0.0	7	0.3
Not line of business	45	1.8	2	3.4	0	0.0	0	0.0	47	1.8
No enough capital	14	0.5	0	0.0	0	0.0	0	0.0	14	0.5
Other	17	0.7	0	0.0	0	0.0	3	23.1	20	0.8
Total	2551	100.0	59	100.0	26	100.0	13	100.0	2649	100.0

WhuaAgar: As indicated in Table 12, the major reason for not stocking WhuaAgar was insufficient demand from customers (94.2%). This is found to be the main reason for all of the outlet types. The second and third reasons were 'not line of business' (1.8%) and 'don't like to store' the product (1.5%), respectively. Very small proportion of outlets indicated other reasons for not being willing to stock the product.

Table 13: Reasons for not Intending to Stock/selling PUR by Outlet Type

Reason for not stocking of PUR	Type of business/outlet									
	Kiosk/Shop	%	Supermarket	%	Drug Shop/Store	%	Pharmacy	%	Total	%
Don't like to store	183	6.0	8	11.1	16	19.0	4	10.0	211	6.5
Insufficient demand	2690	88.7	55	76.4	66	78.6	30	75.0	2841	88.0
Insufficient profit	5	0.2	0	0.0	0	0.0	0	0.0	5	0.2
Misconceptions	20	0.7	0	0.0	1	1.2	1	2.5	22	0.7
Not line of business	78	2.6	7	9.7	1	1.2	0	0.0	86	2.7
No enough capital	13	0.4	0	0.0	0	0.0	1	2.5	14	0.4
Other	42	1.4	2	2.8	0	0.0	4	10.0	48	1.5
Total	3031	100.0	72	100.0	84	100.0	40	100.0	3227	100.0

PUR: The main reason for not intending to stock PUR is similar to that of WhuaAgar. The single most reason for lack of interest in stocking the product is mentioned to be insufficient demand- about 88.0% of all the outlets visited reported that there is no demand for PUR in their area (Table 13). Insufficient demand of the product is mentioned as the main reason by all of the outlet types. Some outlets don't like to store the product at all (6.5%). This is the second major reason for drug stores, supermarkets and pharmacies in that order.

Table 14: Reasons for not Intending to Stock/selling ITN by Outlet Type

Reason for not stocking ITN	Type of business/outlet									
	Kiosk/Shop	%	Supermarket	%	Drug Shop/Store	%	Pharmacy	%	Total	%
Don't like to store	65	3.4	1	3.6	4	6.3	0	0.0	70	3.5
Insufficient demand	1192	63.1	21	75.0	46	71.9	22	91.7	1281	63.9
Insufficient profit	23	1.2	0	0.0	0	0.0	0	0.0	23	1.1
Misconceptions	2	0.1	0	0.0	0	0.0	0	0.0	2	0.1
Not line of business	587	31.1	6	21.4	14	21.9	1	4.2	608	30.3
No enough capital	18	1.0	0	0.0	0	0.0	0	0.0	18	0.9
Other	2	0.1	0	0.0	0	0.0	1	4.2	3	0.1
Total	1889	100.0	28	100.0	64	100.0	24	100.0	2005	100.0

ITN:As indicated in Table 14, outlets that are not intending to stock ITN reported many factors for their lack of interest in stocking the product. Among the reasons reported by the outlets, insufficient demand was reported to be the major factor for not intending to stock ITN (about 64.0%). This is the main reason for all the

outlet types. The second reason was reported to be not line of business (30.3%) and this is the second most important factor for kiosks, drug stores, and supermarkets, respectively.

Table 15: Reasons for not Intending to Stock/selling Condom by Outlet Type

Reason for not stocking Condom	Type of business/outlet									
	Kiosk/Shop	%	Supermarket	%	Drug Shop/Store	%	Pharmacy	%	Total	%
Don't like to store	491	22.8	7	13.0	0	0.0	1	20.0	499	22.5
Insufficient demand	1064	49.5	30	55.6	4	66.7	2	40.0	1100	49.7
Insufficient profit	11	0.5	0	0.0	0	0.0	0	0.0	11	0.5
Misconceptions	301	14.0	9	16.7	1	16.7	1	20.0	312	14.1
Not line of business	60	2.8	1	1.9	1	16.7	0	0.0	62	2.8
No enough capital	6	0.3	0	0.0	0	0.0	0	0.0	6	0.3
Other	216	10.1	7	13.0	0	0.0	1	20.0	224	10.1
Total	2149	100.0	54	100.0	6	100.0	5	100.0	2214	100.0

Condom: Like the above stated products (WhuaAgar, PUR and ITN), insufficient demand was reported to be the major reason for not stocking condom in the future. This is the main reason for about half of the outlets (49.7%). It is reported to be the main reason for majority of the drug stores (66.7%), supermarkets (55.6%), kiosks (49.5%), and pharmacies (40.0%). Some 22.5% of the outlets don't like to store the product due to their own personal reasons. Unlike the other products, misconceptions about condom appear to be the third reason for not stocking the product (14.1%). The product is not in their line of business for some 2.8% of the outlets who don't like to stock condom in their outlet.

Table 16: Reasons for not Intending to Stock/selling De-worming Tablets by Outlet Type

Reason for not stocking De-worming tablet	Type of business/outlet					
	Drug Shop/Store	%	Pharmacy	%	Total	%
Don't like to store	0	0.0	1	20.0	1	10.0
Insufficient demand	2	40.0	4	80.0	6	60.0
Not line of business	2	40.0	0	0.0	2	20.0
Other	1	20.0	0	0.0	1	10.0
Total	5	100.0	5	100.0	10	100.0

De-worming drugs: As De-worming tablets and ORS are expected to be stocked in health outlets, information on willingness to stock the products was sought from pharmacies and drug stores only. Like the other products, insufficient demand for the product was the major reason for not stocking De-worming tablets for 60.0% of the drug stores and pharmacies who are not interested to stock the product. This is the fundamental reason for 80.0% and 40.0% of pharmacies and drug stores, respectively (Table 16). Some 20.0% of the outlets reported that the product is not in their line of business.

Table 17: Reasons for not Intending to Stock/selling Hand washing Soap by Outlet Type

Reason for not stocking Hand washing soap	Type of business/outlet									
	Kiosk/Shop	%	Supermarket	%	Drug Shop/Store	%	Pharmacy	%	Total	%
Don't like to store	5	5.4	0	0.0	0	0.0	0	0.0	5	4.3
Insufficient demand	61	65.6	1	50.0	10	76.9	2	28.6	74	64.3
Insufficient profit	3	3.2	0	0.0	0	0.0	0	0.0	3	2.6
Misconceptions	1	1.1	0	0.0	0	0.0	0	0.0	1	0.9
Not line of business	12	12.9	1	50.0	3	23.1	2	28.6	18	15.7
No enough capital	5	5.4	0	0.0	0	0.0	0	0.0	5	4.3
Other	6	6.5	0	0.0	0	0.0	3	42.9	9	7.8
Total	93	100.0	2	100.0	13	100.0	7	100.0	115	100.0

Hand Washing Soaps: As indicated above, only very few of them (3.2%) are not stocking the product. The main reason for majority of these outlets is insufficient demand for the product (64.3%). This is the most important factor for 76.9%, 65.6% and 50.0% of the drug stores, kiosks and supermarkets, respectively. The second reason is that the product is not their line of business (15.7%).

Table 18: Reasons for not Intending to Stock/selling ORS by Outlet Type

Reason for not stocking ORS	Type of business/outlet					
	Drug Shop/Store	%	Pharmacy	%	Total	%
Don't like to store	1	50.0	1	25.0	2	33.3
Insufficient demand	0	0.0	3	75.0	3	50.0
Not line of business	1	50.0	0	0.0	1	16.7
Total	2	100.0	4	100.0	6	100.0

ORS/LemLem: A large number of outlets do want to stock ORS/LemLem in the future (97.5%). The remaining proportion of outlets who do not want to stock the product were asked about their intention to stock the product. The survey result indicates that their main reason is insufficient demand for the product (50.0%). As indicated in Table 18, the second main reason is that they simply don't like to store the product (33.3%).

In all, the above series of tables shows that the major reason for not stocking any of the PCP Kit component products was reported to be insufficient demand of the product. The other main reasons for many of the outlets who don't want to stock the product are 'not line of business' and 'don't like to store' the product.

5.3 PSI/Ethiopia Sales Supervisor and Representative Visit

The analysis also reported the frequency of PSI/Ethiopia sales team visit to the outlets in the 19 sampled kebeles of each survey region.

Table 19: PSI/Ethiopia Sales Representative Visit to Outlets by Product Type

Sales Representative Visit to Product	No. of Outlets Visited	Total Number of Outlets Responded to the product	%
WhuaAgar	219	4,395	5.0
PUR	58	4,395	1.3
ITN	2	2,241	0.1
Condom	58	4,393	1.3
De-worming tablet	34	238	14.3
Hand washing Soap	34	4,385	0.8
ORS	2	239	0.8

Table 20: PSI/Ethiopia Sales Representative Visit to Outlets by Region

Study Region	Total Number of Outlets	Sales Person Visit for Product						
		WhaAgar	PUR	ITN	Condom	De-worming tablet	ORS	Hand washing Soap
Amhara	887	11(1.2%)	5(0.6%)	0(0.0%)	3(0.3%)	2(0.2%)	1(0.1%)	4(0.5%)
Oromiya	970	8(0.8%)	4(0.4%)	1(0.1%)	10(1.0%)	0(0.0%)	0(0.0%)	2(0.2%)
SNNPR	959	25(2.65)	7(0.7%)	1(0.1%)	6(0.6%)	2(0.2%)	0(0.0%)	2(0.2%)
Tigray	680	24(3.5%)	18(2.6%)	0(0.0%)	1(0.1%)	0(0.0%)	0(0.0%)	1(0.1%)
Addis Ababa	908	151(16.6%)	24(2.6%)	NA	38(4.2%)	2(0.2%)	1(0.1%)	25(2.8%)
Total	4,404	219(5.0%)	58(1.3%)	2(0.1%)	58(1.3%)	6(0.1%)	2(0.0%)	34(0.8%)

Another important indicator in measuring market performance is the organization's sales team visits to the market, specifically to the key distributors and retailer outlets where the products are, or potentially, being sold. This second round MAP study unveiled that very few outlets were visited by PSI/ Ethiopia sales representatives (Table 19).

As shown in Table 19 above, majority of the outlets reported that they did not receive a visit by PSI/Ethiopia sales representatives in the six months prior to the survey. Relatively better visits were made to health outlets

dealing with De-worming tablets. However, even though PSI/ Ethiopia have a branded De-worming tablet, so far it didn't distribute the product to the market. Therefore, we suspected that respondents/outlets took the visit made by other sales representatives as that of PSI/Ethiopia. Some visits were also made to outlets stocking WhuaAgar (5.0%) followed by PUR (1.3%).

Comparison of visits by region (Table 20) shows that relatively better number of visits were made to outlets dealing with WhuaAgar, in Addis Ababa city administration, Tigray, SNNPR and Amhara regions in that order. Visits made to outlets for WhuaAgar and PUR were found to be low in Oromiya region compared to the other regions.

It can be noticed from the finding that much was not done in visiting outlets for marketing PSI/Ethiopia products – WhuaAgar and PUR. Therefore, there is a need to improve market execution of the products by increasing the frequency of market visits in the PCP Kit distributed areas of the project.

5.4 Operation Hours of Outlets

Outlets were asked about at which hours of the day they open and close their outlets. Accordingly, the findings are presented in the following tables (Table 21 and 22).

Table 21: Opening Hours of Outlets

Opening Hours of Outlets	Type of business/outlet									
	Kiosk/Shop	%	Supermarket	%	Drug Shop/Store	%	Pharmacy	%	Total	%
2:00 - 2:30 AM	2	0.0	0	0.0	0	0.0	0	0.0	2	0.0
5:00 - 5:45AM	32	0.8	1	1.1	0	0.0	0	0.0	33	0.8
6:00 - 6:45AM	1112	27.4	20	21.1	25	16.0	8	9.6	1165	26.6
7:00 - 7:50AM	1646	40.6	34	35.8	35	22.4	26	31.3	1741	39.7
8:00 - 8:30AM	967	23.9	36	37.9	92	59.0	47	56.6	1142	26.0
9:00 - 9:30AM	246	6.1	4	4.2	3	1.9	2	2.4	255	5.8
10:00 - 10:30AM	33	0.8	0	0.0	0	0.0	0	0.0	33	0.8
11:00 - 11:30AM	10	0.2	0	0.0	0	0.0	0	0.0	10	0.2
12:00 - 12:30AM	4	0.1	0	0.0	1	0.6	0	0.0	5	0.1
Total	4052	100.0	95	100.0	156	100.0	83	100.0	4386	100.0

As indicated in Table 21 above, most of the kiosks open between 7:00-7:50 am (40.6%) and over a quarter of them (27.4%) open at around 6:00 - 6:45 in the morning. Some 24.0% of the kiosks open from 8:00 to 8:30 in the morning. This is tantamount to saying that majority of the kiosks (92.0%) open from 6:00 to 8:30 in the morning. The opening hour of supermarkets is similar to that of kiosks- majority of the supermarkets (94.8%) open from 6:00 to 8:30 am. Unlike kiosks and supermarkets, health outlets open late in the morning - around 8:00 to 8:30am.

Table 22: Closing Hours of Outlets

Closing Hours of Outlets	Type of business/outlet									
	Kiosk/Shop	%	Supermarket	%	Drug Shop/Store	%	Pharmacy	%	Total	%
2:00 - 2:30 PM	15	0.4	0	0.0	0	0.0	0	0.0	15	0.3
3:00 - 3:30PM	11	0.3	0	0.0	0	0.0	0	0.0	11	0.3
4:00 - 4:30PM	14	0.3	0	0.0	0	0.0	0	0.0	14	0.3
5:00 - 5:30PM	34	0.8	3	3.3	1	0.7	3	3.8	41	0.9
6:00 - 6:30PM	263	6.5	3	3.3	8	5.3	5	6.3	279	6.4
7:00 - 7:45PM	352	8.7	4	4.3	15	9.9	6	7.5	377	8.6
8:00 - 8:40PM	1136	28.0	23	25.0	54	35.8	23	28.8	1236	28.2
9:00 - 9:45PM	1320	32.6	33	35.9	44	29.1	27	33.8	1424	32.5
10:00 - 10:30PM	750	18.5	23	25.0	26	17.2	14	17.5	813	18.6
11:00 - 11:30PM	132	3.3	2	2.2	3	2.0	2	2.5	139	3.2
12:00 - 12:30PM	27	0.7	1	1.1	0	0.0	0	0.0	28	0.6
Total	4054	100.0	92	100.0	151	100.0	80	100.0	4377	100.0

The closing hours of the outlets are indicated in Table 22 above. The finding shows that the majority of the outlet owners close their outlets during similar time period, that is, around 8:00 to 9:45 in the evening. Some of the kiosks serve their customers until 10:30pm and a quarter of the supermarkets are open until this time of the day. The opening hours of the health outlets, where De-worming tablets and ORS are being sold, are not very much different from the other outlets- kiosks and supermarkets. As can be seen from Table 22, most pharmacies and drug stores are open until 10:30pm.

5.5 Source of Supply of Products

Outlets were asked to indicate where they get the products stocked in their outlets. The findings show that the sources of the products vary across the products. For detail please see Annex –I, Table 23.

Source of Supply of WhuaAgar: It was found that most of the kiosks obtained WhuaAgar from PSI/Ethiopia Sales representatives (44.2%) followed by private wholesalers (30.6%). PSI sales representatives are the major source of majority of the outlets- 62.0% of drug stores, 48.4% of supermarkets, and 37.7% of pharmacies. Similarly, private wholesalers were found to be the source of WhuaAgar for many of the outlets- 38.7% of the supermarkets, 30.2% of the pharmacies and 22.0% of the drug stores. The findings show that NGOs and other organizations do also supply WhuaAgar for a number of outlets.

Source of Supply of PUR: Like WhuaAgar, many of the outlets obtained PUR from PSI sales representatives and private wholesalers - 77.8% of the kiosks, all of the supermarkets (100.0%) and 60.0% of the drug stores and pharmacies. Moreover, some 20.0% of the pharmacies visited accessed PUR from NGOs working in their area.

Source of Supply of ITN: As indicated earlier, ITN was not found in many of the outlets in the malarious areas. Those stocked the product were asked the source of ITN. As can be seen from Annex-I, Table 23, NGOs Ethiopia, 2011

working in the surveyed areas and private wholesalers were found to be the major source of ITN in the malarious areas. Among the two suppliers of ITN, over half of the outlets selling the product (64.3%) accessed ITN from private wholesalers. As ITN is being distributed to households free of charge by the government authorities, the government /MoH was not indicated as one of the sources of ITN by the outlets.

Source of Supply of Condoms: The survey revealed that the major suppliers of condom for almost all of the outlet types were NGOs and private wholesalers. As indicated in annex -1 (Table 23), about 66.2% and 28.5% of the outlets accessed condoms from NGOs and private wholesalers, respectively.

Source of Supply of De-worming tablets: The sole suppliers of De-worming tablets for pharmacies and drug stores were found to be the Ministry of Health (MoH) and private wholesalers. Some 36.8% and 56.1% of the pharmacies and outlets accessed De-worming tablets from government (EPHARM) and private wholesalers, respectively.

Source of Supply of ORS/LemLem: Like De-worming tablets, the major sources of ORS are private wholesalers. Some 21.0% have also accessed the product from government. Unlike De-worming tablets, a number of drug stores and pharmacies (35.8%) obtained the product from NGOs.

Source of Supply of Hand washing Soaps (HWS):In Ethiopian context major commodities are distributed through the private sector, specifically, private wholesalers. As expected, the overwhelming majority of the sources for hand washing soaps were found to be private wholesalers. As indicated in Table 23, nearly all of the outlets (99.5%) accessed soaps from private wholesalers. The proportion of outlets who obtained HWS from other sources (MoH, NGOs and sources categorized as 'other') is very minimal.

5.5 Availability of Non-PSI/Ethiopia brand products in the market

The survey has also assessed the availability of non-PSI products in the survey areas. As obtained by the survey, the major non-PSI water treatment products available in the market are presented in Table 24 below.

Table 24: Availability Non-PSI Brand Products by Region

PSI Product	Project Region (No. of Outlets stocking WhuaAgar)	Non-PSI Product in the Market	Type of Outlet				
			Kiosk	Supermarket	Drug Shop/store	Pharmacy	Total
WhuaAgar	Amhara (N=43)	Aquatab	0(0.0%)	0(0.0%)	2(4.7%)	6(14.0%)	8(18.6%)
	Tigray (N=45)	Aquatab	3(6.7%)	0(0.0%)	39(86.7%)	3(6.7%)	45(100.0%)
		Bishangarie	1(2.2%)	0(0.0%)	0(0.0%)	0(0.0%)	1(2.2%)
	Oromiya(N=93)	Aquatab	1(1.1%)	1(1.1%)	5(5.4%)	10(10.8%)	17(18.3%)
		Bishangarie	2(2.2%)	0(0.0%)	0(0.0%)	0(0.0%)	2(2.2%)
	SNNPR (N=128)	Aquatab	12(9.4%)	0(0.0%)	16(12.5%)	5(3.9%)	33(25.8%)
		Bishangarie	2(1.6%)	0(0.0%)	1(0.8%)	0(0.0%)	3(2.3%)
	Addis Ababa (N=200)	Aquatab	26(13.0%)	8(4.0%)	15(7.5%)	22(11.0%)	71(35.5%)
		Bishangarie	0(0.0%)	0(0.0%)	2(1.0%)	5(2.5%)	7(3.5%)
	Total			47(4.8%)	9(0.9%)	80(8.2%)	51(5.2%)

Aquatab and Bishangarie were found to be the Non-PSI/Ethiopia brands competing water treatment products. The distribution of these Non-PSI/Ethiopia products by outlet shows that Aquatab is mostly found in drug stores and pharmacies in many of the surveyed regions: Tigray, Amhara, SNNPR and Addis Ababa. The market penetration rate of non-PSI products is very low- only 187 of the 4,404 outlets (about 4.3%) stocked these products. Compared with the number of outlets stocking WhuaAgar in the respective regions, the availability of Aquatab is high in Tigray (100.0%), Addis Ababa (35.5%), SNNPR (25.8%), Amhara (18.6%) and Oromiya (18.3%) in that order. Bishangarie is less available in many of the regions compared with Aquatab.

VII. Conclusions and Recommendations

6.1 Conclusion

PSI/Ethiopia employed Lot Quality Assurance Sampling (LQAS) to estimate the coverage, quality of coverage and market penetration of PCP Kit component products in the surveyed areas. Nineteen kebeles per region were selected for the study from 146 PCP Kit distributed towns. Among the PCP kit component products considered, only two of them are PSI/Ethiopia products. However, the findings of each product included in PCP Kit were reported together in this report.

Minimum standards were set to estimate the coverage, quality of coverage and penetration rate of the products. Accordingly, estimates of coverage, quality of coverage and penetration rates were estimated for each of the products. The survey revealed that the coverage of male condom, and hand washing soap were found to be high whereas that of PUR and ITN were relatively low, in almost all of the regions, compared to the other products. WhuaAgar has coverage in a large number of kebeles across all regions. Except condom, quality of coverage rates of many of the products was found to be low for most quality standards. It was found that WhuaAgar scored high quality of coverage for visibility and 'within expiry date' standards whereas PUR had low quality of coverage in terms of all the standards set for estimating quality of coverage of the product. Moreover, price adherence particularly for WhuaAgar and PUR had low score. The presence of expired products in the market appeared to be relatively low as a result the scores for this quality standard are high, except for PUR where quality of coverage for within expiry date is very low. The occurrence of stock out is not a problem for most of the products.

With regard to market penetration, De-worming tablet, hand washing soap, and ORS/LemLem are the most common products in the surveyed areas. PSI/Ethiopia products are low in terms of market penetration across all regions surveyed. Market penetration by outlet type shows that many of the PCP Kit component products are commonly found in pharmacies and drug stores than the other outlets visited.

The survey has also revealed a number of other results, viz., intention to stock products, reasons for not stocking products, source of supply of products, availability of non-PSI/Ethiopia products. It was found that many of the outlets are willing to stock many of the PCP Kit component products except WhuaAgar, PUR and ITN mainly due to insufficient demand. Moreover, the study revealed that PSI sales representatives and private wholesalers were found to be the major suppliers of many of the products. As far as presence of non-PSI/Ethiopia products is concerned, the finding shows that Aquatab and Bishangarie are the major competitive water treatment products available in the market; however, their market penetration rate is low compared to PSI/Ethiopia products.

6.2. Recommendation

- The survey revealed that the coverage and market penetration of PSI/Ethiopia products are low. Moreover, many of the outlets do not have the intention of stocking WhuaAgar and PUR mainly due to insufficient demand of customers. PSI sales representative visits to outlets were also found to be low. Hence, given the problem of clean water at the grassroots level, it is advisable to create more demand for these products through social marketing activities. More emphasis needs to be given to the promotion and distribution of PUR.

- The quality of coverage of PUR with respect to the minimum standard of within expiry date is low. Therefore, PSI/Ethiopia needs to monitor and destock expired products so as to improve the adoption of its products in the market.
- Quality of coverage of the two PSI/Ethiopia products (WhuaAgar and PUR) in terms of recommended buying and selling prices of the products were found to be low. That is, price adherence for WhuaAgar and PUR is low. Price should be given due emphasis as high price could act as barrier for people not to use the products. Thus, it is essential to make retailers adhere to PSI/Ethiopia's recommended prices. Given the problem of clean water at the grassroots level, PSI/Ethiopia sales representatives should give more emphasis to price adherence besides creating demand for the products.
- The quality of coverage for many of the products is relatively better for visibility of the products for customers but not for presence of promotional materials and other quality standards. The presence of promotional materials will positively increase the number of customers; thus, efforts need to be exerted towards making available promotional materials for PSI/Ethiopia products and increase the frequency of sales representatives' visits to outlets.
- Continue monitoring trends in PCP kit component products availability and pricing so as to sustainably refill and enhance the use of the products.

ANNEX 1, Table 23: Source of Supply of PCP Kit Component Products

Type of Outlet	Source of Supply					
	MoH	PSI Sales Representative	NGOs	Private Wholesaler	Other	Total
1. WhuaAgar						
Kiosk/Shop(%)	5(0.9%)	238(44.2%)	93(17.3%)	165(30.6%)	38(7.1%)	539(100.0%)
Supermarket(%)	1(3.2%)	15(48.4%)	3(9.7%)	12(38.7%)	0(0.0%)	31(100.0%)
Drug Shop/Store(%)	1(1.0%)	65(61.9%)	13(12.4%)	23(21.9%)	3(2.9%)	105(100.0%)
Pharmacy(%)	0(0.0%)	20(37.7%)	13(24.5%)	16(30.2%)	4(7.5%)	53(100.0%)
Total(%)	7(1.0%)	338(46.4%)	122(16.8%)	216(29.7%)	45(6.2%)	728(100.0%)
2. PUR						
Kiosk/Shop(%)	2(2.8%)	26(36.1%)	7(9.7%)	30(41.7%)	7(9.7%)	72(100.0%)
Supermarket(%)	0(0.0%)	1(50.0%)	0(0.0%)	1(50.0%)	0(0.0%)	2(100.0%)
Drug Shop/Store(%)	1(10.0%)	4(40.0%)	1(10.0%)	2(20.0%)	2(20.0%)	10(100.0%)
Pharmacy(%)	1(20.0%)	2(40.0%)	1(20.0%)	1(20.0%)	0(0.0%)	5(100.0%)
Total(%)	4(4.5%)	33(37.1%)	9(10.1%)	34(38.2%)	9(10.1%)	89(100.0%)
3.ITN						
Kiosk/Shop(%)	0(0.0%)	0(0.0%)	4(50.0%)	4(50.0%)	0(0.0%)	8(100.0%)
Drug Shop/Store(%)	0(0.0%)	0(0.0%)	1(33.3%)	2(66.7%)	0(0.0%)	3(100.0%)
Pharmacy(%)	0(0.0%)	0(0.0%)	0(0.0%)	3(100.0%)	0(0.0%)	3(100.0%)
Total(%)	0(0.0%)	0(0.0%)	5(35.7%)	9(64.3%)	0(0.0%)	14(100.0%)
4. Condom						
Kiosk/Shop(%)	0(0.0%)	24(1.7%)	892(62.8%)	447(31.5%)	58(4.1%)	1421(100.0%)
Supermarket(%)	0(0.0%)	0(0.0%)	23(74.2%)	8(25.8%)	0(0.0%)	31(100.0%)
Drug Shop/Store(%)	0(0.0%)	2(1.3%)	135(90.6%)	10(6.7%)	2(1.3%)	149(100.0%)
Pharmacy(%)	0(0.0%)	0(0.0%)	60(80.0%)	13(17.3%)	2(2.7%)	75(100.0%)
Total(%)	0(0.0%)	26(1.6%)	1110(66.2%)	478(28.5%)	62(3.7%)	1676(100.0%)
5. De-worming tablet						
Drug Shop/Store(%)	70(46.1%)	1(0.7%)	3(2.0%)	74(48.7%)	4(2.6%)	152(100.0%)
Pharmacy(%)	14(18.4%)	0(0.0%)	2(2.6%)	54(71.1%)	6(7.9%)	76(100.0%)
Total(%)	84(36.8%)	1(0.4%)	5(2.2%)	128(56.1%)	10(4.4%)	228(100.0%)
6. Hand washing soap						
Kiosk/Shop(%)	0(0.0%)	3(0.1%)	10(0.3%)	3929(99.5%)	6(0.2%)	3948(100.0%)
Supermarket(%)	0(0.0%)	0(0.0%)	0(0.0%)	95(100.0%)	0(0.0%)	95(100.0%)
Drug Shop/Store(%)	0(0.0%)	1(0.9%)	0(0.0%)	115(98.3%)	1(0.9%)	117(100.0%)
Pharmacy(%)	0(0.0%)	0(0.0%)	1(1.4%)	68(97.1%)	1(1.4%)	70(100.0%)
Total(%)	0(0.0%)	4(0.4%)	11(0.3%)	4207(99.5%)	8(0.2%)	4230(100.0%)
7. ORS						
Drug Shop/Store(%)	39(26.2%)	0(0.0%)	64(43.0%)	44(29.5%)	2(1.3%)	149(100.0%)
Pharmacy(%)	8(10.4%)	0(0.0%)	17(22.1%)	46(59.7%)	6(7.8%)	77(100.0)
Total(%)	47(20.8%)	0(0.0%)	81(35.8%)	90(39.8%)	8(3.5%)	226(100.0%)

ANNEX 2: Audit Sheet

S.No	Questions
A.	Date of interview (dd/mm/yy) -----/-----/2011
B.	Region: 1= Amhara 2= Oromiya 3=SNNPR 4=Tigray 5= Addis Ababa(Circle only one Region)
C.	Zone/Su-City: -----
D.	Woreda -----
E.	Type of location:1=Urban 2= Semi-urban (Circle only one location and write the name of the location in the space provided below) Name of Town -----
F.	Kebele name/Number: -----
G.	Malarious Area: 1= Yes 2= No
H.	Interviewer name _____ Interviewers code ___/___/___/___/

SECTION I: VENUE INFORMATION

No	Questions and filters	Coding categories
101	Name of business/ outlet (If any)	
102	Type of business /outlet (Put the appropriate code of the outlet in the box provided to the right) 1. Kiosk/shop 2. Supermarket 3. Drug shop/store 4. Pharmacy	
103	Geographic coordinate (GPS reading) of the outlet (Set the GPS to Decimal)	1=Lat N _____ . _____ 2= Long E _____ . _____ 3= Elevation (meter) -----

SECTION II: KIT COMPONENT PRODUCT AVAILABILITY(CIRCLE THE APPROPRIATE CHOICES)

S.N	Questions and filter	Coding categories						
		WhuaAgar	PUR	ITN	Condom	De-worm tablet	Hand washing soap	ORS
201	Are there products (<i>mention product name</i>) available today? (verify by seeing the product)  →If No (If the outlet had been selling the product but stocked out this week), skip to 206 →If No (If the outlet has never stocked/sold the product), skip to 209	0 =No 1=Yes	0 =No 1 =Yes	0=No 1=Yes 3=NA	0=No 1=Yes	0=No 1=Yes 3=NA	0 =No 1 =Yes	0=No 1=Yes 3=NA
202	(Observation only)  Is the product visibly displayed to customers	0 =No 1=Yes	0 =No 1 =Yes	0=No 1=Yes 3=NA	0 =No 1=Yes	0=No 1=Yes 3=NA	0 =No 1 =Yes	0=No 1=Yes 3=NA
203	(Observation only!)  Is the product expired?	1. Yes 2. No 3. Can't tell expiry date	1. Yes 2. No 3. Can't tell expiry date	1. Yes 2. No 3. Can't tell expiry date 4. NA	1. Yes 2. No 3. Can't tell expiry date	1. Yes 2. No 3. Can't tell expiry Date 4. NA	1. Yes 2. No 3. Can't tell expiry date	1. Yes 2. No 3. Can't tell expiry date 4. NA
204	What is the selling price of product?(List Maximum of three Products)	ETB-----	ETB-----	Name ----- ETB----- Name ----- ETB----- Name ----- ETB----- 99.DK/ can't tell 100. NA				

SECTION II: KIT COMPONENT PRODUCT AVAILABILITY(CIRCLE THE APPROPRIATE CHOICES)

S.N	Questions and filter	Coding categories						
		WhuaAgar	PUR	ITN	Condom	De-worm tablet	Hand washing soap	ORS
205	On average, what is the unit buying price for each product?(List Maximum of three Products)	ETB----- 99.DK/ can't tell	ETB----- 99.DK/ can't tell	Name ----- ETB----- Name ----- ETB----- Name ----- ETB----- 99.DK/ can't tell 100. NA	Name ----- ETB----- Name ----- ETB----- Name ----- ETB----- 99.DK/ can't tell	Name ----- ETB----- Name ----- ETB----- Name ----- ETB----- 99.DK/ can't tell 100. NA	Name ----- ETB----- Name ----- ETB----- Name ----- ETB----- 99.DK/ can't tell	Name ----- ETB----- Name ----- ETB----- Name ----- ETB----- 99.DK/ can't tell 100. NA
206	If the business already sells the products what was the source of supply, the last time the product was stocked?	1.MOH 2.PSI Sales Representative 3. NGOs 4. Private wholesaler 5.Others(specify)-- ----- -----	1.MOH 2.PSI Sales Representative 3. NGOs 4. Private wholesaler 5.Others(specify)-- ----- -----	1.MOH 2.PSI Sales Representative 3. NGOs 4. Private wholesaler 5.Others(specify)- ----- ----- 6. NA	1.MOH 2.PSI Sales Representative 3. NGOs 4. Private wholesaler 5.Others(specify)- ----- -----	1.MOH 2.PSI Sales Representative 3. NGOs 4. Private wholesaler 5.Others(specify)- ----- ----- 6. NA	1.MOH 2.PSI Sales Representative 3. NGOs 4. Private wholesaler 5.Others(specify)- ----- -----	1.MOH 2.PSI Sales Representative 3. NGOs 4. Private wholesaler 5.Others(specify)- ----- ----- 6. NA
207	Is the product sold in a timely manner or does it sit on your shelves for a long time?	1.Sit long time 2.Sold timely 99.DK/can't tell	1.Sit long time) 2.Sold timely 99.DK/ can't tell	1.Sit long time 2.Sold timely 99.DK/ can't tell 100. NA	1.Sit long time 2.Sold timely 99.DK/ can't tell	1.Sit long time) 2.Sold timely 99.DK/ can't tell 100. NA	1.Sit long time) 2.Sold timely 99.DK/ can't tell	1.Sit long time 2.Sold timely 99.DK/ can't tell 100.NA
208	(Observe, do not ask)  Are there any promotional materials for this product displayed?	0 =No 1=Yes	0 =No 1 =Yes	0=No 1=Yes 3= NA	0 =No 1=Yes	0 =No 1 =Yes 3= NA	0 =No 1 =Yes	0=No 1=Yes 3=NA

SECTION II: KIT COMPONENT PRODUCT AVAILABILITY(CIRCLE THE APPROPRIATE CHOICES)

S.N	Questions and filter	Coding categories						
		WhuaAgar	PUR	ITN	Condom	De-worm tablet	Hand washing soap	ORS
209	Do you usually sell the product? →if No skip to212	0 =No 1=Yes	0 =No 1 =Yes	0=No 1=Yes 3=NA	0 =No 1=Yes	0 =No 1 =Yes 3=NA	0 =No 1 =Yes	0=No 1=Yes 3=NA
210	Did the outlet experience any stock out during the past 4 weeks? →if No skip to212	0 =No 1=Yes 99=(DK)	0 =No 1 =Yes 99=(DK)	0=No 1=Yes 99=(DK) 100=NA	0 =No 1=Yes 99=(DK)	0 =No 1 =Yes 99=(DK) 100=NA	0 =No 1 =Yes 99=(DK)	0=No 1=Yes 99=(DK) 100=NA
211	On average for how long did you stay out of stock	1. < one week 2.2- 4 weeks 3. > 4 weeks 99.DK/ can`t tell	1. < one week 2.2- 4 weeks 3. > 4 weeks 99.DK/ can`t tell	1. < one week 2.2- 4 weeks 3. > 4 weeks 99.DK/ can`t tell 100.NA	1. < one week 2.2- 4 weeks 3. > 4 weeks 99.DK/ can`t tell	1. < one week 2.2- 4 weeks 3. > 4 weeks 99.DK/ can`t tell 100.NA	1. < one week 2.2- 4 weeks 3. > 4 weeks 99.DK/ can`t tell	1. < one week 2.2- 4 weeks 3. > 4 weeks 99.DK/ can`t tell 100.NA
212	Would you be interested in stocking /selling the product in your outlet? →if Yes skip to 214	0 =No 1=Yes 99 = Don't know	0 = No 1 = Yes 99 = Don't know	0 = No 1 = Yes 99 = Don't know 100=NA	0 = No 1 = Yes 99 = Don't know	0 = No 1 = Yes 99 = Don't know 100=NA	0 = No 1 = Yes 99 = Don't know	0 = No 1 = Yes 99 = Don't know 100=NA
213	Why are you not interested in stocking / selling this product? (Check all that apply)	1. Don't like to store 2. Insufficient demand 3. Insufficient profit 4.Misconceptions 5 Not line of business 6.No enough capital 7.Other(specify) ----- -----	1. Don't like to store 2.Insufficient demand 3.Insufficient profit 4.Misconceptions 5Not line of business 6.No enough capital 7.Other (specify)--- -----	1. Don't like to store 2. Insufficient demand 3. Insufficient profit 4.Misconception 5 Not line of business 6.No enough capital 7.Other(specify) --- ----- 8. NA	1. 1. Don't like to store 2. Insufficient demand 3. Insufficient profit 4.Misconception 5 Not line of business 6.No enough capital 7.Other(specify) ----- -----	1. Don't like to store 2. Insufficient demand 3. Insufficient profit 4.Misconceptions 5 Not line of business 6.No enough capital 7.Other(specify) ---- ----- 8. NA	1. Don't like to store 2. Insufficient demand 3. Insufficient profit 4.Misconceptions 5 Not line of business 6.No enough capital 7.Other(specify) -- -----	1. Don't like to store 2.Insufficient demand 3.Insufficient profit 4.Misconceptions 5No line of business 6.Not enough capital 7.Others----- ----- 8. NA

ANNEX 3: Sampled Kebeles in PCP Kit Distributed Towns

List of Sample Kebeles byTown and Project Region

Region	Town	Kebele
1. Amhara		
	Debre Birhan	Debre Birhan K06
	Shoa Robit	Shoa Robit K03
	Bati	Bati K02
	Kombolcha	Kombolcha K05
	Dessie	Dessie K03
		Dessie K10
	Woldiya	Woldiya K05
	Nefas Mewcha	Nefas Mewcha K01
	Debre Tabor	Debre Tabor K08
	Gondar	Gondar K01
		Gondar K05
	Kola Diba	Kola Diba K02
	Bahir Dar	Bahir Dar K06
	Finote Selam	Finote Selam K01
	Burie	Burie K03
	Merawi	Merawi K03
	Motta	Motta K01
	Debre Markos	Debre Markos K06
	Sekota	Sekota K01
Total	17	19
2. Oromiya		
	Jima	Jima K 03/04
	Agaro	Agaro K01
	Bedelle	Bedelle K01
	Nekemte	Nekemte K01
	Gimbi	Gimbi K04
	Ambo	Ambo K03
	Tulubolo	Tulubolo K01
	Mojo	Mojo K01
	Bishoftu	Bishoftu K07
	Adama	Adama K11
	Shashemene	Shashemene K02
	Ziway	Ziway K02
	Bale Robe	Bale Robe Misrak
	Assela	Assela K07
	Haromaya	Haromaya K01

	Chiro	Chiro K02
	Shakiso	Shakiso K01
	Hageremariam	Hageremariam K01
	Moyale	Moyale K02
Total	19	19
3. SNNPR		
	Wolkitie	Welkitie K01
	Buee	Buee K01
	Butajira	Butajira K02
	Durame	Durame Zeraro
	Hossaena	Hossaena K05
		Hossaena K04
	Shone	Shone K01
	Sodo	Sodo Gido
	Chencha	Chencha K02
	Arbaminch	Arbaminch Mehale Ketema
		Arbaminch Doyissa
	Sawla	Sawla Mehale Ketema
	Yirgacheffe	Yirgacheffe K03
		Yirgacheffe K02
	Dila	Dila K02
	Hawassa	Hawassa Yengat Kokeb
		Hawassa Millenium
	Aletawondo	Aletawondo
	Yirgalem	Stadium(02)
Total	15	19
4. Tigray		
	Mehoni	Mehoni K01
	Alamata	Alamata K04
	Korem	Korem K01
	Maichew	Maichew K01
		Maichew K04
	Addishu	Addishu K01
	Adigudem	Adigudem K01
	Mekele	Mekelle K16
		Mekelle K07
		Mekelle K11
	Atsbi	Atsbi K01
	Adigrat	Adigrat K03
		Adigrat K04
	Enticho	Enticho K01

	Adewa	Adewa K03
	Axum	Axum K02
	Shire	Shire K03
	Shiraro	Shiraro K01
	Humera	Humera K02
Total	15	19
5. Addis Ababa		
	Addis Abeba	Arada Woreda 10 K10
		Akaki Woreda 02 K02/04
		Akaki Woreda 05 K10/11
		Yeka Woreda 07 K08
		Yeka Woreda 03 K19
		Bole Woreda 11 K11
		Bole Woreda 11 K03/05
		Addis Ketema Woreda 04 K08/09/18
		Addis Ketema Woreda 06 K14/21
		Nefas Sillk Woreda 03 K03/04
		Nefas Silk Woreda 05 K07/08
		Kolfe Woreda 07 K06/07
		Kolfe Woreda 05 K13/14
		Gullele Woreda 07 K08/16
		Gullele Woreda 03 K07/17
		Lideta Woreda 04 K04
	Lideta Woreda 08 K08/11	
	Kirkos Woreda 09 K17	
	Kirkos Woreda 04 K05/06/07	
Total	1	19

ANNEX 4: Glossary

DEFINITIONS and ACRONYMS:

Term	Definition
Coverage	Coverage is the proportion of geographic units (kebeles) in which a minimum standard of product or service availability is present. The primary use of the coverage indicator is in determining whether proximity of populations to PCP Kit component products and services is increasing or decreasing over time. The lowest minimum standard of availability is the presence of at least two outlets (at least one outlet for ITN) in the area that PSI/Ethiopia delivers PCP Kit component products.
LQAS	Lot Quality Assurance Sampling is a sampling and analysis method that is used to determine, with a level of precision that is sufficient for decision-making purposes, whether a given area reaches a pre-established benchmark or not.
MAP	MAP (Measuring Access and Performance) studies are a tool for measuring the performance of social marketing product and service delivery systems in developing countries. PSI measures social marketing performance among vulnerable populations at the individual level as well as by assessing the delivery systems by which the populations are reached. MAP studies are designed to measure the coverage, quality, and equity of access of social marketing product and service delivery systems. With this additional evidence, our social marketers take action to continuously improve upon the cost-effectiveness, equity, and efficiency of our interventions.
Outlets	Outlets are supermarkets, kiosks, pharmacies, and drug stores that may potentially sell or distribute PCP Kit component products WhuaAgar, PUR, condom, ITN, De-worming tablets, hand washing soaps, and ORS/LemLem. Only those outlets that are inside the boundaries of the selected kebeles.
Penetration	Penetration rate is the proportion of outlets in which a PCP Kit component product or service is available: out of all potential outlets for a given product or service, it is the percentage of outlets that actually sell the product or provide the service.
Quality of Coverage	Quality of coverage is the proportion of geographic units (kebeles) in which the PSI product or service delivery system is available and conforms to additional minimum standards (visibility, presence of promotional materials, price adherence, no stock out, within expiry date) as described later in the report.
Stock out	Outlets that do not have any of the PCP Kit component products available in the 4 weeks prior to the audit is considered in this survey as a stock out.