

Condom Programming Insights and Recommendations

Executive summary from *“Challenges and recommendations for reaching ‘Fast-Track’ targets for condom use”*

This document outlines the key findings from a Mann Global Health (MGH) review of the state of condom programming, which was funded by the Bill & Melinda Gates Foundation in 2018 to support donor alignment around the challenges confronting condom programming in the context of declining funding.

The summary highlights insights generated from data analysis, stakeholder interviews, literature reviews, and meetings with members of the global Condom Working Group. It also provides recommendations to address challenges in condom programming, so that donors may program their investments in condoms more effectively. The analysis focuses on the programming challenges for **male** condoms, and “condoms” refers to male condoms throughout the document. While some of the findings and recommendations would also apply to female condoms, they face a different set of social, cultural and economic barriers to use.

Available data show that slow but steady progress toward higher levels of condom use and improved equity continues to be the norm across sub-Saharan Africa (SSA). However, all countries fall short of global targets (some by a substantial amount), inequities remain, and condom use in younger populations shows signs of stagnation or decline in at least a few key countries.

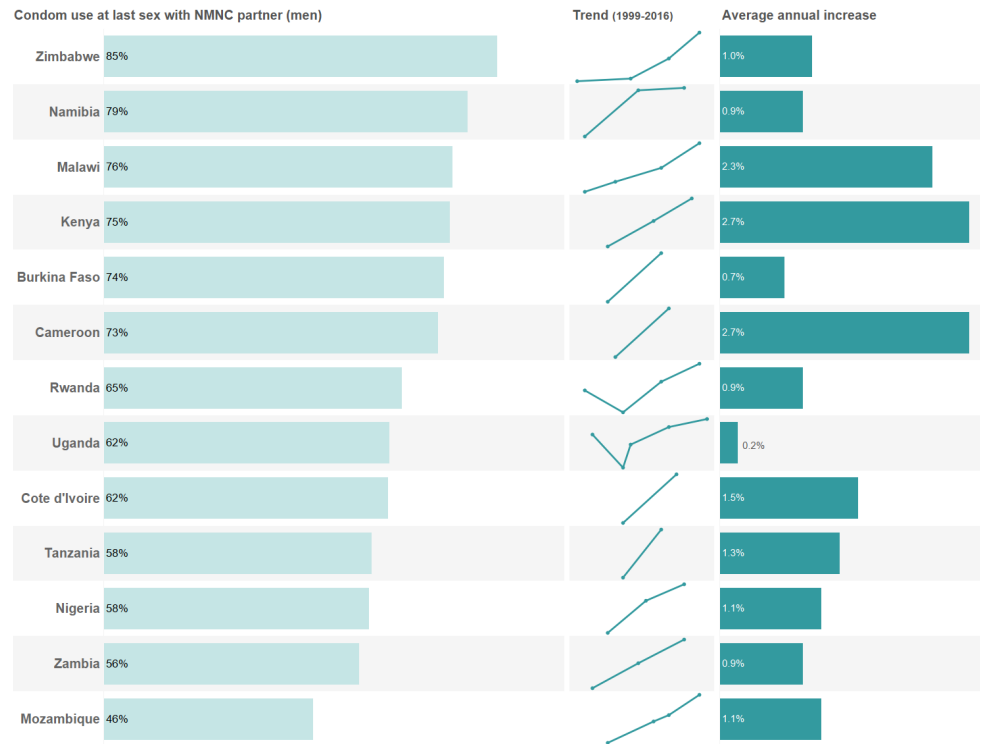
Six insights into the global condom market will be important to consider in designing and funding condom programming:

1. The “condom gap” is a “demand gap.” Increasing motivation and ability to use condoms by addressing social and behavioral barriers is required to drive condom use; it is not just a matter of increasing supply.
2. Condom programming has not fully adapted to the emergence of other HIV prevention options. The scaling up of these options is sometimes perceived as a threat to condom programming rather than an opportunity to increase condom use through robust models of integration that include strong condom-focused behavior change and skills-building components in otherwise medicalized interventions. There are also opportunities to strengthen condom programming within broader STI prevention and sexual and reproductive health (SRH) programs.
3. There is little consensus on how social marketing programs can best contribute in changing condom markets. Donors do not sufficiently coordinate on how to evolve these programs toward better use of subsidies, and transition to less dependence on donors for procurement and distribution of condoms.
4. Free condoms distributed through the public sector have been and will continue to be an important source of condoms, especially for the poor, but substantial challenges remain in forecasting, targeting, and monitoring distribution.
5. The commercial sector is positioned to make a larger, if modest, contribution to condom markets, but barriers to expansion remain, especially in the absence of a national vision of and commitment to a total market approach (TMA) and economic incentives to enter markets.
6. Consistently weak market stewardship functions continue to impede progress – including developing a vision for the total market; gathering, disseminating, and applying market intelligence for decision-making; and monitoring demand generation activities and distribution to ensure coverage of at-risk groups.



FIGURE 1. Condom use at last non-marital, non-cohabitating sex (men)

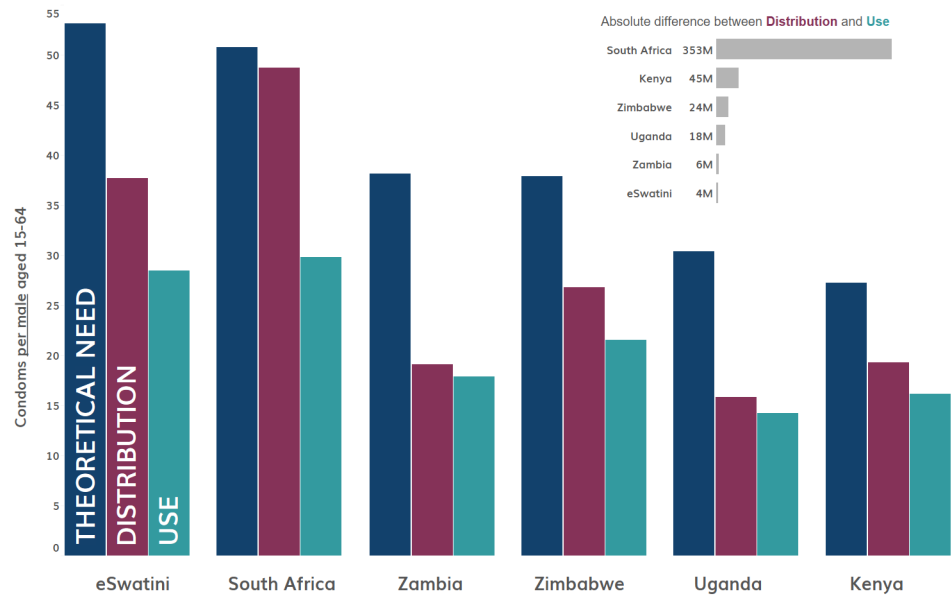
MGH analyzed 13 countries in Sub-Saharan Africa with enough data to observe trends in condom use and factors that drive use. Countries show similar slow upward trends across all populations but fall short of the 90% target.



Source: DHS

FIGURE 2. Theoretical need, distribution and use

MGH used the UNAIDS Condom Needs Estimation Tool to compare theoretical need to distribution and use for 2017. Theoretical need exceeds distribution in all countries; in some, condoms distributed exceed condoms used, suggesting a need to optimize free condom distribution to reduce wastage.



Sources: UNAIDS condom needs estimation tool v. 6.29.18; MGH landscaping reports; UNAIDS prevention scorecard

These insights into the challenges facing global condom programming inform the following **eight recommendations for donors**. Taken together, these recommendations address the most basic requirements of condom programming to create a path towards increasing condom use equitably and sustainably.

1. Substantially **increase investment in demand creation**. Condom use in at-risk populations is more likely to lag because of a lack of motivation or ability to use condoms rather than due to a supply gap. Use is unlikely to increase without sustained, large-scale demand generation activities.
2. Coordinate with the governments of fast-track countries to ensure there is support for an **adequate condom supply in the public sector** for the foreseeable future. Free condoms must be available for the segments of the population that depend on them. Support for procurement should be based on realistic forecasts for the growth in demand and should consider the contribution of the commercial and social marketing sectors.
3. Invest in **leadership and coordination functions** at the country level to strengthen market stewardship in support of a TMA. A key goal for this investment would be the development and operationalization of a vision for a healthy market to guide resource allocation.
4. Invest in **market data** and the capacity to use it. To inform programming across all sectors, it is critical that all market actors understand who is using condoms; who is not using condoms and why; the number of condoms distributed and where; and target audience responses to interventions. This information should be packaged and widely shared in order for it to be actionable for decision-makers.
5. **Integrate** smart and comprehensive behavior-focused condom programming, including skills-building, into the broader HIV prevention and treatment ecosystem. The emergence of other prevention options is an opportunity for condom programs to reach more people more frequently within a prevention ecosystem that provides choice to target audiences. This integration can be accomplished while also ensuring strong condom components within STI prevention and SRH programs.
6. Support better, more targeted, **more efficient public sector distribution** that reaches those in need of free condoms. Improved distribution starts with understanding condom needs in relation to demand; quantification and procurement based within a TMA; and market segmentation to map those in greatest need of free condoms and how best to reach them.
7. Support **social marketing organizations** (SMOs) to achieve higher value impact. SMOs are well positioned to contribute to demand creation, market stewardship, and market intelligence efforts using public funds, while evolving brands toward full cost-recovery in most contexts.
8. Address market barriers to create more space and increase economic incentives for the **commercial sector**. Reducing barriers such as large-scale untargeted free condoms and overly subsidized social marketing condoms will be critical to accelerate the engagement of the commercial sector and increase the likelihood that condoms can reach more people and reduce the market's dependence on subsidy.

Data quality presented a challenge in the analysis of the state of global condom programming. While there are considerable data on condom programming available from various sources, there is a lack of timeliness, consistency, and coordination in collection and dissemination of data related to condom programming. As a result, there is little understanding of the relationship between inputs (funding, other resources) and outputs (changes in condom use). The investments in market intelligence noted above should address this challenge, resulting in an increased ability for the condom programming community to design cost-effective programs and monitor progress at a country, regional, and global level. ■