NEW MODELS FOR FUNDING CONDOM PROGRAMMES

MANN GLOBAL HEALTH 2018
TWO CHALLENGES TO HIGHLIGHT TODAY

- PROBLEM #1: CONDOM USE FALLS SHORT OF CONDOM NEED
- PROBLEM #2: FUNDING IS DECLINING
GLOBAL ESTIMATES OF CURRENT USE VS NEED, AND GAP IN CONDOMS FOR HIV AND STI PREVENTION AMONG KEY POPULATIONS (2015)

Source: Stover et al 2017: The Case for Investing in the Male Condom
THE GAP BETWEEN CONDOM DISTRIBUTION (PROXY FOR USE) AND TOTAL CONDOM NEED IN SELECT COUNTRIES

<table>
<thead>
<tr>
<th>Country</th>
<th>Condom Distribution/Need</th>
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<tbody>
<tr>
<td>Zimbabwe</td>
<td>73%</td>
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<tr>
<td>Zambia</td>
<td>50%</td>
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<tr>
<td>South Africa</td>
<td>93%</td>
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<tr>
<td>Nigeria</td>
<td>28%</td>
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<tr>
<td>Kenya</td>
<td>68%</td>
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</tbody>
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Source: Distribution data from in-country assessments and UNAIDS Condom Fast Track Tool

Volume units sold & distributed per various sources

Total condom needs (Universe of need + 28% wastage)
% Condom use at last high-risk sex, Women 15 – 49

Source: DHS Statcompiler
CONDOM USE AT LAST HIGH RISK SEX AMONG WOMEN AGES 15 - 49

Countries with decreasing or stagnant use at last high risk sex among women (1999-2017):

- Zimbabwe
- Zambia
- Uganda
- Senegal
- Ethiopia
- Sierra Leone
- Madagascar
- Mali
- Ghana

Source: DHS Statcompiler
% CONDOM USE AT LAST HIGH-RISK SEX, MEN 15 – 49

Source: DHS Statcompiler
PERSISTENT EQUITY GAPS IN USE – URBAN / RURAL DIVIDE

WOMEN (15-49) WITH MULTIPLE PARTNERS WHO REPORTED USING A CONDOM AT LAST SEXUAL INTERCOURSE, URBAN VS RURAL
PERSISTENT EQUITY GAPS – LAGGING USE IN LOWER WEALTH QUINTILES

ZIMBABWE
CONDOM USE AT LAST SEX WITH NON-COHIRBITATING, NON-MARITAL PARTNER
BY WEALTH QUINTILE
PROBLEM #2: DONOR FUNDING FOR CONDOMS ON THE DECLINE

USG funding for HVOP and Condom Programming

<table>
<thead>
<tr>
<th>Year</th>
<th>Funding (millions)</th>
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<tbody>
<tr>
<td>2011</td>
<td>$32.40</td>
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<tr>
<td>2012</td>
<td>$26.80</td>
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<tr>
<td>2013</td>
<td>$34.40</td>
</tr>
<tr>
<td>2014</td>
<td>$23.40</td>
</tr>
<tr>
<td>2015</td>
<td>$16.70</td>
</tr>
<tr>
<td>2016</td>
<td>$16.80</td>
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</tbody>
</table>
QUANTITY OF CONDOMS PROCURED STAGNATING AND VOLATILE

Quantity of MC Procured by major donors and implementing partners (2004 – 2014)

Assessed failing condom program functions in 8 countries
Diagnosed root causes to prioritize failing functions
Recommended improvements to condom program funding models
A Market Development Approach aims to identify program failures, analyze root-causes of those failures, and develops interventions supporting scale, equity and sustainability.

A TMA aims to use the comparative advantages of public, nonprofit, and private commercial sources of health goods to increase access to and sustainability of priority health products.
UPDATED CONDOM PROGRAM PATHWAY

Condom Program Stewardship
- Leadership & Coordination
- Program Analytics
- Financing
- Policy & Regulation

Condom Program Development
- Supply Functions
- Demand Functions

Condom Program Outcomes
- Use Behaviors
- Equity
- Sustainability
KEY FINDINGS: FAILURES OF SPECIFIC FUNCTIONS IN CONDOM MARKETS/ECOSYSTEMS ARE SIMILAR ACROSS COUNTRIES

I. Missing link between country strategies, work plans, & resources
II. Condom stewardship & leadership lacking
III. Lack of coordinated financing strategies for all aspects of condom programming
IV. Insufficient investment & coordinated efforts in demand creation, leaving a generation unexposed to quality SBC
V. Insufficient program intelligence: failure to consistently monitor programs and condom ecosystem in terms of equity, sustainability, and growth
VI. Poorly targeted subsidy over-allocated to commodities
VII. Limited role of commercial actors in diversifying the national response (& supporting long-term sustainability)
PRINCIPLES GUIDING CONDOM INVESTMENTS

- Invest in systemic corrections to failing condom ecosystem functions.
  - Know your condom ecosystem prior to changing it.
- Do no harm to the ecosystem (*beware unintended consequences*).
- Consumer choice is key to growing use.
Key Recommendations

1. Assign an *ecosystem facilitator* to foster an enabling environment for the *total condom program* across all players in the market.
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2. Invest resources in building program information as a public good for evidence-based decision-making at all levels of the ecosystem.
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2. Invest resources in building program information as a public good for evidence-based decision-making at all levels of the ecosystem.

3. Ensure highly targeted and leveraged donor investment in demand creation in order to move condom use closer to need.
Key Recommendations

1. **Assign an ecosystem facilitator** to foster an enabling environment for the total condom program across all players in the market.

2. **Invest resources in building program information** as a public good for evidence-based decision-making at all levels of the ecosystem.

3. **Ensure highly targeted and leveraged donor investment in demand creation** in order to move condom use closer to need.

4. **Improve supply chain** in the public and private sector. Target funding to last mile interventions.
A **market facilitator** role is critical to support governments to steward national condom programs, driving a vision of a healthy, sustainable condom market.

- Ensure clear mandate (SOW) and funding for sustained engagement.
- Market facilitator also conducts mapping of ALL market players, current and potential, developing plan to implement various aspects of condom programming.
- Ensure donor subsidy benefits all implementing agencies share information and data with market facilitator.
## Prioritized Market Intelligence

<table>
<thead>
<tr>
<th>Type</th>
<th>Information collected</th>
<th>Frequency</th>
<th>Agency</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Population-Based Surveys</strong></td>
<td>Demographic and Health Surveys including AIS, population-based HIV and sexual behavior surveys</td>
<td>Once every two years</td>
<td>Government agency</td>
</tr>
<tr>
<td><strong>Market Overview</strong></td>
<td>Use over Need analysis (based on UNAIDS calculator), types and numbers of market players, distribution volumes (reported by players), brands and variants, recommended prices and % reliance on subsidy</td>
<td>Once a year</td>
<td>Market Facilitator &amp; key Government agency lead (with direct inputs from market players)</td>
</tr>
<tr>
<td><strong>Market Audits/Surveys (along the value chain)</strong></td>
<td>Information by brand and channel – availability, distribution volumes, consumer and trade prices, trade and consumer promotions, off-take (average monthly/quarterly distribution)</td>
<td>Quarterly</td>
<td>Market Facilitator (outsourced to a research agency)</td>
</tr>
<tr>
<td><strong>Target Group Surveys</strong></td>
<td>Qualitative surveys to understand socio-cultural barriers to condom use among target populations, including most at-risk populations, youth and other vulnerable populations</td>
<td>Once every two years</td>
<td>Existing HIV/FP partners/SBC lead agency/Market Facilitator along with key Government agency lead</td>
</tr>
<tr>
<td><strong>Consumer Segmentation</strong></td>
<td>To identify clusters of consumers for improved condom promotion and marketing efforts</td>
<td>Once every 3-4 years</td>
<td>Market Facilitator (in partnership with private players)</td>
</tr>
</tbody>
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