What is the state of condom programming in Sub-Saharan Africa?

Brian Smith
September 25, 2018
Methodology

- Interviews with representatives of SSA governments, donors, commercial sector and civil society
- AIDSFree studies on Willingness to Pay Study, Retail Landscape, Social Marketing Pricing History
- Desk review of Demographic and Health Surveys (DHS), country behavioral surveillance surveys, social marketing statistics (DKT), and other published and gray literature, including Mann Global Health (MGH) landscaping reports
- Application of UNAIDS Condom Needs Estimation Tool
- Focus on 13 SSA countries (including the five 20 by 20 priority countries)
Presentation Outline

1. Trends in condom use in SSA
2. Trends in donor funding for HIV prevention
3. Six insights to inform future condom programming
Condom Use Trends
Condom use has steadily increased, but…

<table>
<thead>
<tr>
<th>% Condom Use at last NMNC sex, men</th>
<th>Trend</th>
<th>Avg Ann Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zimbabwe</td>
<td>85</td>
<td>1.0%</td>
</tr>
<tr>
<td>Namibia</td>
<td>79</td>
<td>0.9%</td>
</tr>
<tr>
<td>Malawi</td>
<td>76</td>
<td>2.3%</td>
</tr>
<tr>
<td>Kenya</td>
<td>75</td>
<td>2.7%</td>
</tr>
<tr>
<td>Burkina Faso</td>
<td>74</td>
<td>0.7%</td>
</tr>
<tr>
<td>Cameroon</td>
<td>73</td>
<td>2.7%</td>
</tr>
<tr>
<td>Swaziland</td>
<td>67</td>
<td></td>
</tr>
<tr>
<td>Rwanda</td>
<td>65</td>
<td>0.9%</td>
</tr>
<tr>
<td>Cote d’Ivoire</td>
<td>62</td>
<td>1.5%</td>
</tr>
<tr>
<td>Uganda</td>
<td>62</td>
<td>0.2%</td>
</tr>
<tr>
<td>Tanzania</td>
<td>60</td>
<td>1.3%</td>
</tr>
<tr>
<td>Nigeria</td>
<td>58</td>
<td>1.1%</td>
</tr>
<tr>
<td>Zambia</td>
<td>55</td>
<td>0.9%</td>
</tr>
<tr>
<td>Mozambique</td>
<td>46</td>
<td>1.1%</td>
</tr>
</tbody>
</table>

- Wide range within SSA
- No countries have hit the 90% target
- Slow growth has been the norm
- Relatively uniform increase in condom use over time regardless of starting point, context
- Trend is similar for women, but at lower rates

Source: DHS Stat Compiler, most recent DHS for each country
There are signs of condom use leveling off or decreasing…

% condom use at last premarital sex

Men, 15-24

Women, 15-24

Source: DHS Stat Compiler
More signs…

- Valuable trend data from South Africa – five comparable surveys at regular intervals
- Condom use amongst younger people had been considerably higher than other countries
- Example of challenges of maintaining high levels of condom use
Condom use becoming more equitable but room to improve

Change in **Urban** and **Rural** use from first to most recent DHS (1996-2016)

Condom use at last NMNC sex (men)

<table>
<thead>
<tr>
<th>Country</th>
<th>Urban</th>
<th>Rural</th>
<th>% Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Uganda</td>
<td>75</td>
<td>60</td>
<td>15</td>
</tr>
<tr>
<td>Kenya</td>
<td>80</td>
<td>70</td>
<td>10</td>
</tr>
<tr>
<td>Zimbabwe</td>
<td>70</td>
<td>60</td>
<td>10</td>
</tr>
<tr>
<td>Burkina Faso</td>
<td>60</td>
<td>50</td>
<td>10</td>
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<td>60</td>
<td>10</td>
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<tr>
<td>Mozambique</td>
<td>80</td>
<td>70</td>
<td>10</td>
</tr>
</tbody>
</table>

%-point change in Urban and Rural gap between first and most recent DHS (1996-2016)

△ = more equity  ▲ = less equity
Condom use trends – summary

• Slow progress toward higher condom use and improved equity continues to be the norm across SSA, with few positive or negative outliers.

• All countries fall short of global targets (some by a substantial amount), inequities remain, and condom use in younger populations show signs of stagnation or decline in at least a few key countries.

• Relatively uniform increase in condom use over time across population segments & countries despite differing contexts & levels of investment in condom programming over the past twenty years.

• Countries that started the 2000s at relatively low levels have also progressed, but continue to lag behind.

• In all 13 countries, self-reported condom use among men in NMNC partnerships has increased in the last 20 years, as well as between the last two surveys. In all but one country (Uganda), condom use has increased among women.
Funding Trends
Funding for HIV programming is declining in aggregate

- Funding from all donor government sources, including Global Fund, for all HIV-related activities
- Nearly 20% drop between 2014 and 2016
- Uptick in 2017 related to a USG timing issue and not likely to continue
USG prevention funding has declined 45% from 2011

2017 increases are driven by shift in timing of allocation and not expected to continue

Other prevention “HVOP”, where dedicated condom programming is included, has declined 26% since its peak in 2011

Source: KFF donor government funding for HIV, 2017
USG funding for prevention (HVOP) and condoms

The U.S. government (USG) has been a major supporter of demand creation for condoms, in large part through social marketing programs.

Budget systems do not track funding for condom programs or demand creation.

Data here represents estimated funding to the major country programs for condoms, much of which was for social marketing.
GFATM prevention funding on downward trend as well

Prevention funding has declined 40% from peak in 2014

Prevention funding as a % of HIV funding has declined 20% to 12%

Source: GFATM internal HIV portfolio analysis
Moving forward:
Six insights
Insight #1
The “condom gap” is a “demand gap”
Behavioral factors differentiate those who use from those who don’t

<table>
<thead>
<tr>
<th></th>
<th>Risk perception</th>
<th>Social norms</th>
<th>Other behavioral issues</th>
<th>Perceived access to condoms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Botswana 2007</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Burkina Faso 2008</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Burkina Faso 2010</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Cameroon 2009</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Kenya 2007</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Zambia 2005</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Zimbabwe 2006</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>

PSI’s TRAC surveys compared users and non-users of condoms across factors associated with condom use.

Significant differences between users and non-users are much more likely to be found in demand-side factors than in supply-side factors.

That is, users and non-users often reported a similar level of access to condoms – so access was not a decisive factor in determining use or non-use.
More supply does not mean greater use…

Greater distribution/man does not necessarily result in greater condom use.

Number of condoms distributed/sold per man 19-04 (2015) and Condom use with non-regular partners (men 15-49) for 18 countries.

Complex relationship between condoms distributed per person and reported condom use

Wide range of reported condom use in a group of countries with similar number of condoms distributed (blue dots on left)

Wide range of number condoms distributed in a group of countries with a similar level of reported condom use (orange dots in upper right)
Insight #2
Condom programming has not fully adapted to the “disruption” caused by new prevention methods.
New prevention methods are scaling up...

TREATMENT AS PREVENTION

If more people with HIV get diagnosed and go onto treatment, there will be less onward infection. This is called ‘treatment as prevention’.

PreEP
A DAY KEEPS HIV AWAY

TAKEN DAILY, PREP IS AN ADDITIONAL PREVENTION OPTION

- Gardener
- HIV-positive women
- PrEP as post-exposure prophylaxis
- Healthy lifestyle
- Yearning for life
- Voluntary medical male circumcision
- APF for patients living with HIV

Get Tested for HIV today!

If you test negative for HIV, there is a new HIV prevention option.

PreEP is a Pre-exposure Prophylaxis for the new additional HIV prevention option for HIV-negative people who are at risk of HIV infection.
Insight #3
Little consensus on how social marketing programs can best contribute in evolving markets
Declining funding, declining sales for traditional social marketing…

SM Condom Distributions by Region (in Millions)

Source: DKT
Room for brand pricing to evolve…
But don’t forget demand creation

Above the line

Below the line
Insight #4
Free condoms play a critical role but challenges remain in the context of a Total Market Approach
Free condoms still the major source for many people…

**Marker share by sector**

- **Public (Free)**: 72%
- **Social Marketing**: 17%
- **Commercial**: 11%

13 SSA countries 2016

- Free condoms distributed through the public sector have been and will continue to be an important source of condoms.
- Country programs have increasingly used forecasting tools to plan procurement; they have invested in improving distribution systems and monitoring distribution.
- Room for improvement in coordination, forecasting, distribution efficiency, and monitoring.

Source: DKT, MGH
Distribution appears to exceed consumption in some countries

Insight #4

Large-scale distribution of free condoms may be creating “over-supply” and leading to excess wastage

Source: UNAIDS Condon Needs Estimation Tool, MGH Landscaping, National Reports
Insight #5
Commercial sector positioned to make a greater contribution but barriers remain
Substantial unmet need and room for growth…

The number of condoms needed to protect at-risk sex acts is 1.3 billion condoms greater than consumption.

No country is consuming 60% of condoms needed.

Source: UNAID Condon Needs Estimation Tool
Condom users are willing to pay...

Among regular users of FREE condoms

<table>
<thead>
<tr>
<th></th>
<th>Kenya</th>
<th>Nigeria</th>
<th>South Africa</th>
<th>Zambia</th>
<th>Zimbabwe</th>
</tr>
</thead>
<tbody>
<tr>
<td>% who have ever purchased condoms</td>
<td>53%</td>
<td>60%</td>
<td>33%</td>
<td>50%</td>
<td>37%</td>
</tr>
<tr>
<td>% willing to pay price of lowest commercial brand</td>
<td>93%</td>
<td>80%</td>
<td>70%</td>
<td>51%</td>
<td>&lt;40%</td>
</tr>
<tr>
<td>% who would seek to purchase if free condoms not available</td>
<td>70%</td>
<td>70%</td>
<td>30%</td>
<td>64%</td>
<td>39%</td>
</tr>
</tbody>
</table>

Regular users of condoms were asked about use of paid condoms, how much they would be willing to pay for the social marketing brand, and what they would do if free condoms were not available.

Source: AIDS Free Willingness to Pay study
Insight #6
Weak performance in several market functions impedes progress
Condom program stewardship a key starting point for market health

- Leadership & Coordination
- Program Analytics
- Financing
- Policy & Regulation
- Supply Functions
- Demand Functions
- Use Behaviors
- Equity
- Sustainability
Conclusion – Key points

1. After decades of investment, condom use has increased but not to desired levels, and equity gaps remain
2. There are concerns that gains in condom use have been and continue to be dependent on donors – and are therefore fragile
3. Condom programming is at an inflection point with funding trending down as other effective prevention methods reach for scale
4. Demand generation is likely to be the key to driving increased use
5. Room to optimize role of free condoms and social marketing, which would create more space for the commercial sector
Thanks.

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