





Are users willing to pay for condoms in sub-Saharan Africa? Surveys in five countries: Kenya, Nigeria, South Africa, Zambia, and Zimbabwe

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Background

- Condoms play a critical role in the prevention of HIV, sexually transmitted infections, and unwanted pregnancy.
- Condom use has increased globally, although in some countries it has stagnated or decreased.
- Condom market in many sub-Saharan countries is dominated by subsidized condoms (i.e., free or socially marketed).
- The commercial sector share of the total condom market is very limited.
- Donor funding for condom procurement and marketing has declined in recent years.
- In 2015, several condom manufacturers and donor agencies formed the 20 x 20 Condom Initiative, a coalition whose main goal is to provide 20 billion condoms to low- and middle-income countries by 2020.
- To achieve this goal, USAID's AIDSFree Project collaborated with the United Nations Population
 Fund to conduct surveys in five selected countries to assess consumers' willingness to pay for
 male condoms.

Objectives

prices were reduced.

- To determine if users of free condoms would be willing to pay for condoms if they were unavailable/restricted.
- To determine if socially marketed condom users would be willing to pay for commercial prices.
 To determine if commercial brands could attract the socially marketed condom users if their

Materials and Methods

- National cross-sectional survey in five countries (Kenya, Nigeria, South Africa, Zambia, and Zimbabwe) in randomly selected geographical areas.
- Study population: Males 18 years of age or older who used a condom in the three months preceding the survey.
- Use of quotas to ensure inclusion of an equal number of urban and rural respondents and of respondents who primarily used free, socially marketed or commercial condoms.
 The survey applied three approaches to assess respondents' willingness to pay for condoms:
- a bidding game: a discrete choice model, and a Van Westendorp price sensitivity measure.
 Data collection by trained research assistants.
- Interview data captured in tablets with NIPO Nfield application.
- Target sample size: 1,200 men in each country with quotas for urban versus rural respondents
- and brand types a participant used most often (i.e., free, socially marketed, and commercial).
 Data analyzed using descriptive statistics. Price sensitivity simulations of the output from
- discrete choice model generated using Kantar Public's proprietary software (ValueManager).

Results

To determine if users of free condoms would be willing to pay for condoms if they were unavailable/restricted

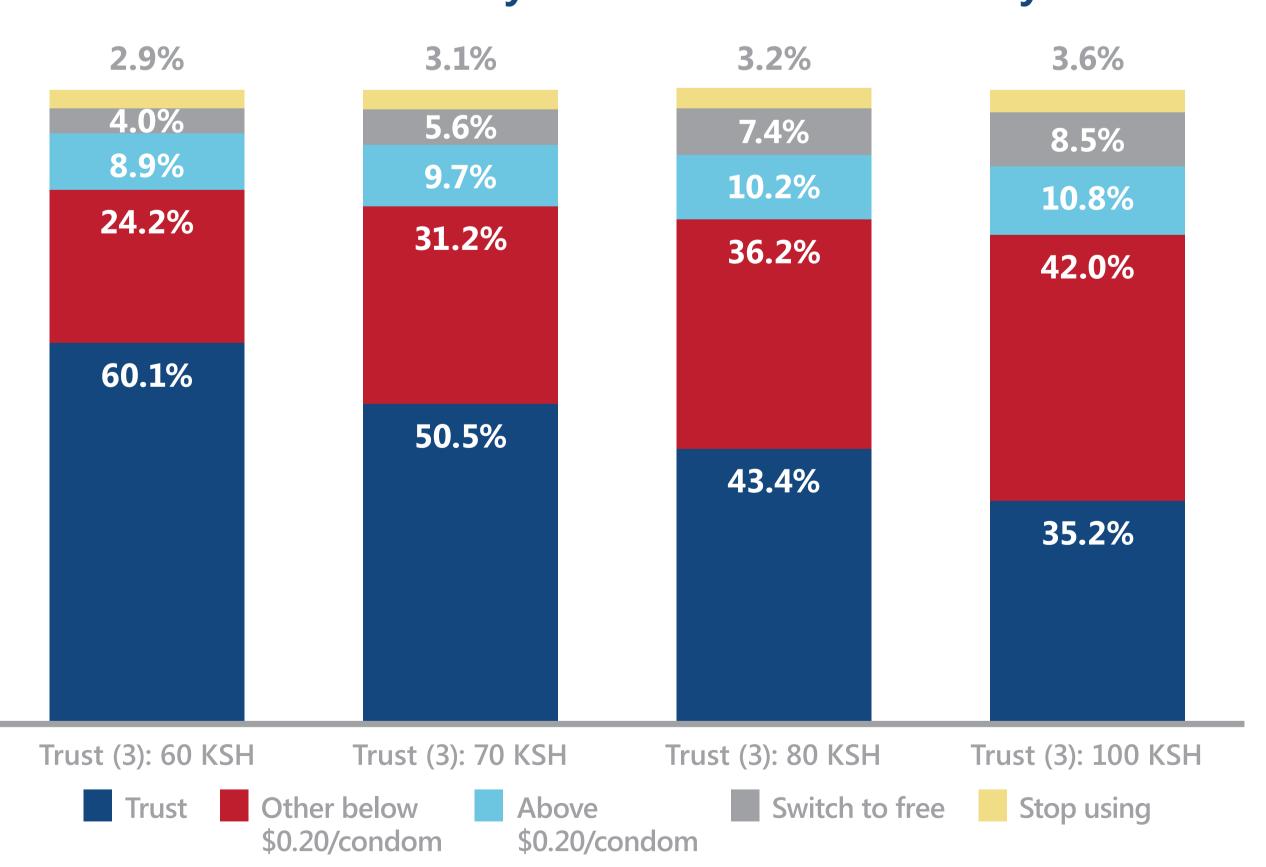
Willingness to pay for condoms among users of free condoms

Country	Users of free condoms			
	Action if free condoms were unavailable at their typical source		Willingness to pay the price of the leading socially marketed condom among those who	Leading socially
	Pay for condoms	Go somewhere else for free condoms	will still use condoms if they	marketed brand (cost)
Cenya	70%	16%	64%	Trust (\$0.60/pack of 3 condoms)
Nigeria	70%	23%	80%	Gold Circle (\$0.20/ pack of 4 condoms)
South Africa	30%	64%	74%	Trust (\$0.66/pack of 3 condoms)
Zambia	64%	26%	51%	Maximum (\$0.51/ pack of 3 condoms)
Zimbabwe	39%	42%	61%	Protector Plus (\$0.32/ pack of 4 condoms)

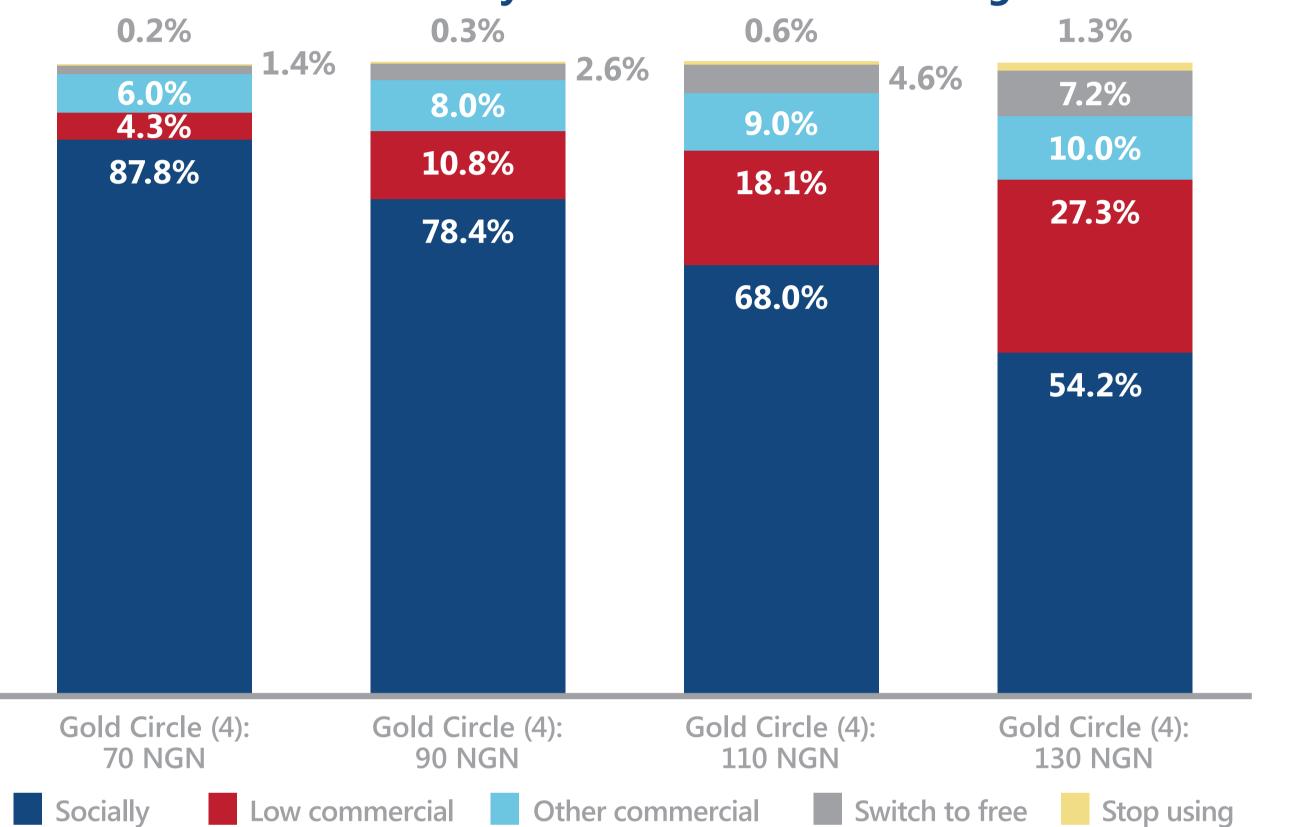
• If free condoms were unavailable at their typical source, among those who would continue using condoms, more than half (51%–80%) would be willing to pay the current market price of the leading socially-marketed condoms.

To determine if socially marketed condom users would be willing to pay for commercial prices

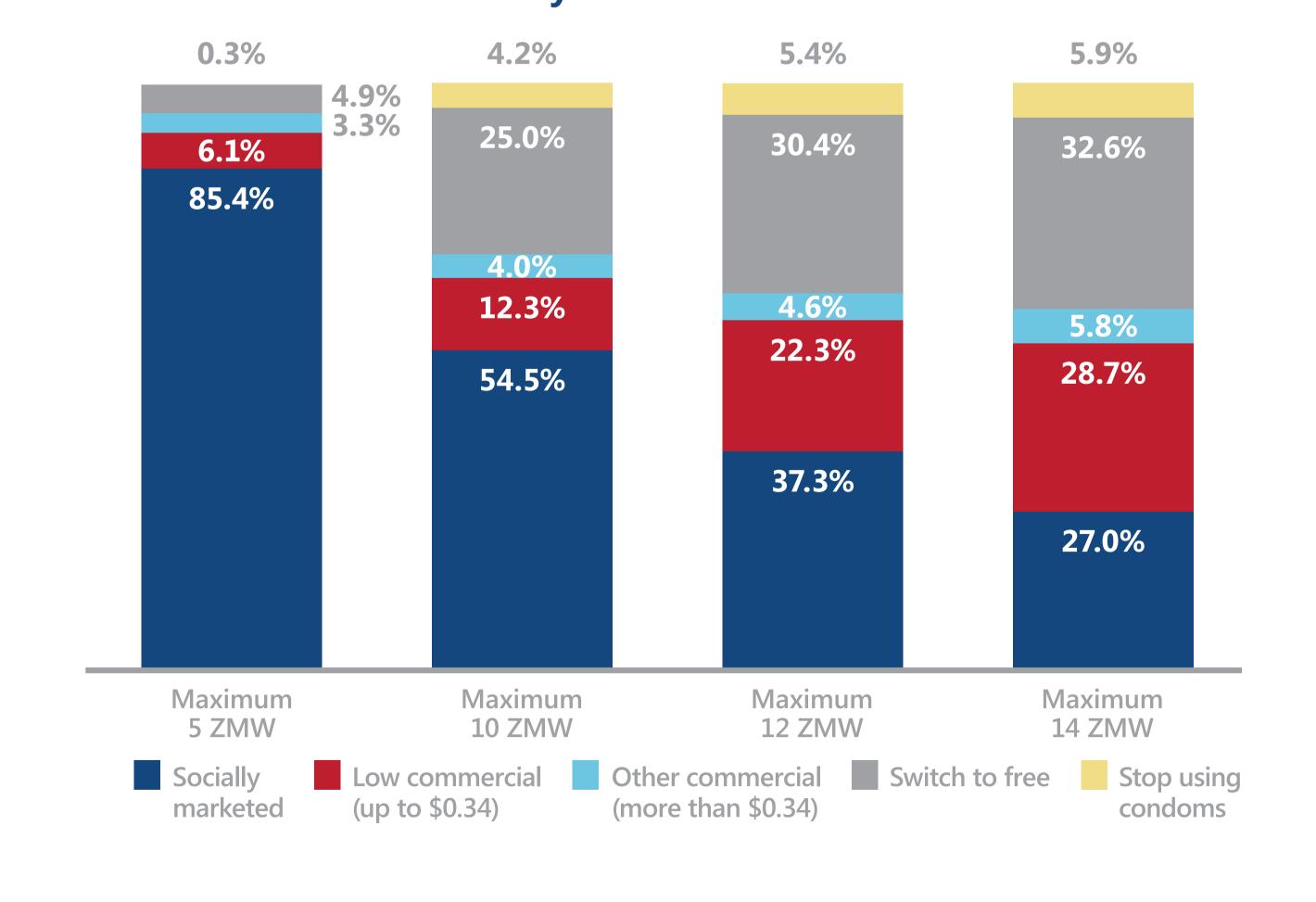




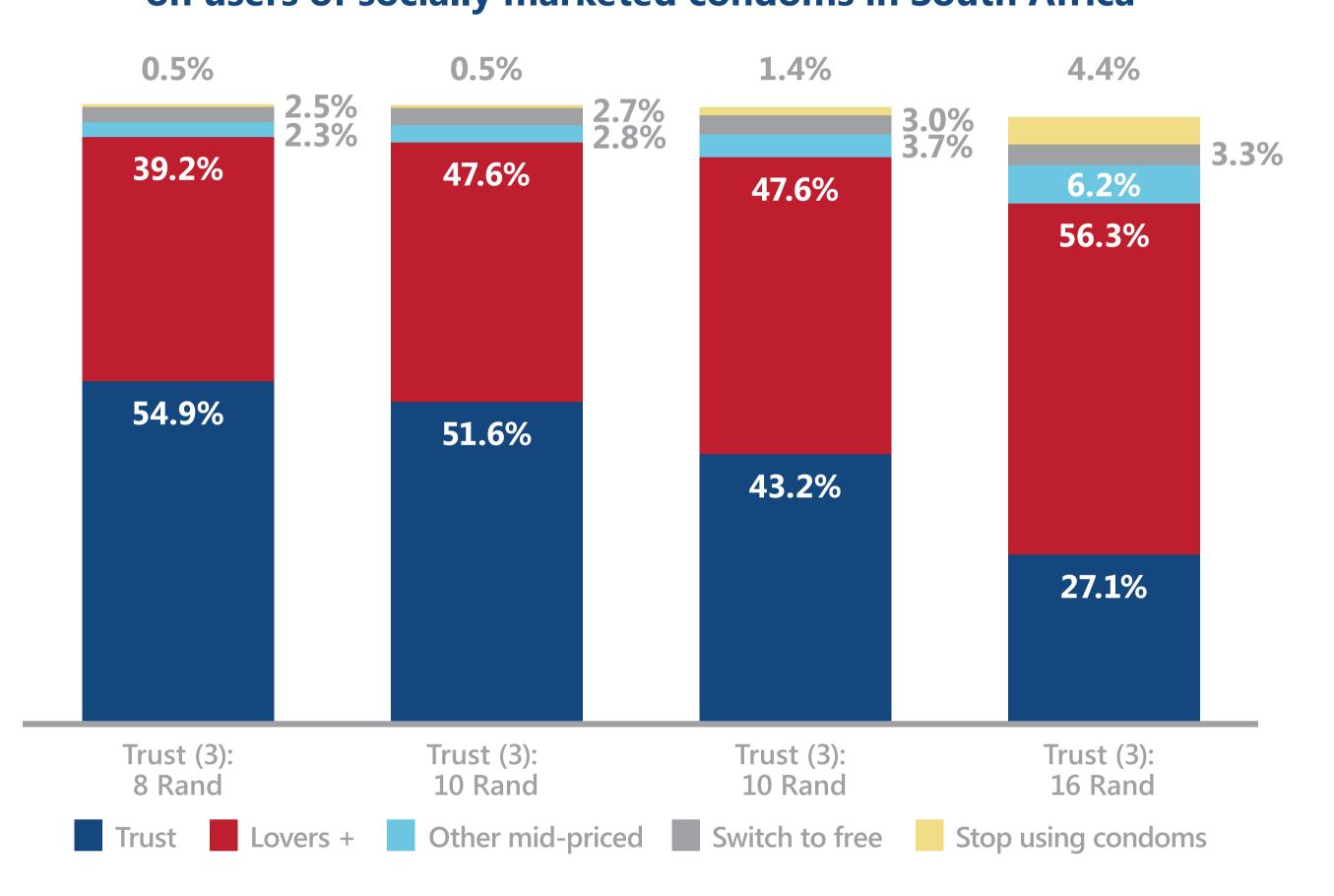
Simulated effect of increases in price of Gold Circle brand on users of socially marketed condoms in Nigeria



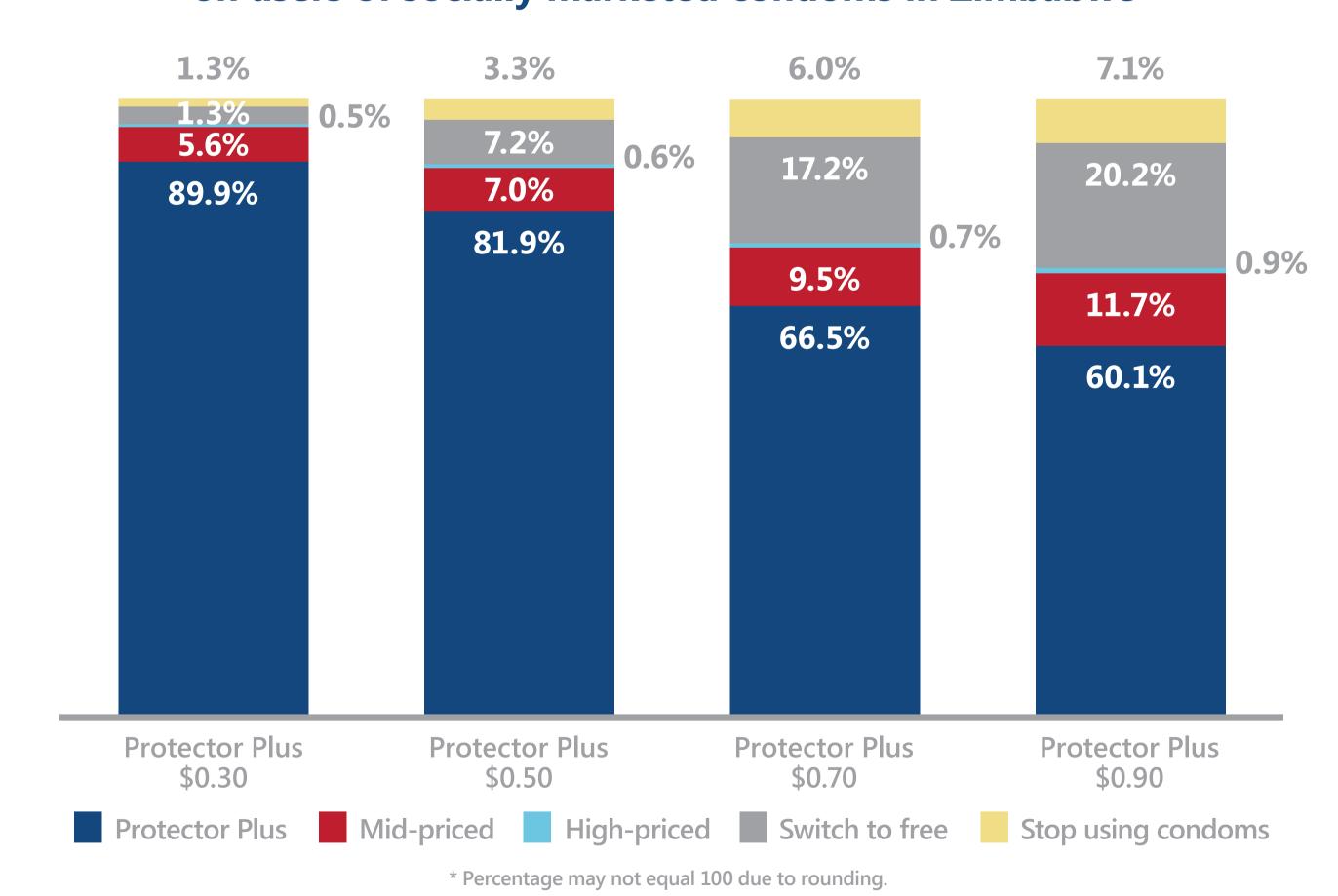
Simulated effect of increases in price of Maximum brand on users of socially marketed condoms in Zambia



Simulated effect of increases in price of Trust brand on users of socially marketed condoms in South Africa



Simulated effect of increases in price of Protector Plus brand on users of socially marketed condoms in Zimbabwe*



- Simulations of socially marketed brand user purchase preferences in Kenya, Nigeria, and South Africa show that, after increasing the most used socially marketed brand's price while maintaining the prices of all other brands constant, some users would switch to other commercial brands, particularly low-priced commercial brands.
- In Zambia and Zimbabwe, simulations indicate that an increase in the most used socially marketed brand's price will result in a significant portion of socially marketed condom users switching to free condoms or stopping using condoms altogether.

To determine if commercial brands could attract the socially marketed condom users if their prices were reduced

- Kenya: A decrease in the price of mid- and high-priced commercial brands has only marginal effects on the volume share of the commercial sector. Further, it has only marginal effects on the volume and value of the brands undertaking these strategies.
- Nigeria: Similar action would likely result in growth of these brands' sales volumes and market value, though this would not result in growth of the total commercial sector.
- South Africa: The same strategy showed potential for only marginal gains in volume, or an increase in volume at the expense of decreased market value.
 Zambia: The same simulations are likely to result in only a marginal growth in the overall
- commercial sector's share.
 Zimbabwe: A decrease in the price of high-priced condoms would likely result in increased volume shares and market value of these specific brands (and overall market value of the commercial sector).

Conclusions

- In cross-country comparisons, our assessment showed that a good proportion of users of free condoms were willing to pay for condoms.
- The assessment also shows that there is a need for a better alignment between supply and demand for free condoms, which could enable scarce resources to be directed toward demand generation activities to grow the commercial market.
- Socially marketed brands should set prices based on ability-to-pay trends in a country rather than on the basis of trends in costs or subsidies available.
- In all countries, our survey showed that low-priced commercial brands may be able to gain greater market share with improved awareness and availability.
- Innovative financing mechanisms to support entry and growth of such brands in new markets could foster rapid expansion of the commercial condom market.



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