



Tanzania Total Market Approach for Condoms: Mixed-Methods Research Results

Abt

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Background

What is a total market approach (TMA)?

- Effort to coordinate strategies and investments across donors and public and private actors
- TMA involves segmenting the market so that public and private products can be targeted to specific user groups based on ability and willingness to pay
- TMA strives to increase the complementarity of the public and private sectors to grow the market, making it more efficient and sustainable



The condom market in Tanzania

- Prior assessments have found the sustainability of Tanzania's condom market is threatened by over-reliance on subsidized and donor-supplied commodities
- USAID/Tanzania and SHOPS Plus are supporting the implementation of a total market approach to help make the condom market more equitable, efficient, and sustainable

Research Objectives and Methods

Research informing a national TMA for condoms

- Qualitative objectives:
- Better understand what motivates consumers' condom selections
- Explore consumers' prioritization of condom brand attributes, price, and product location
- Obtain qualitative information on condom users' willingness to pay
- Quantitative objectives:
- Assess availability and average prices of all socially marketed and commercial condom brands known in Tanzania across a range of retail outlets that typically sell condoms

Qualitative

- 16 focus group discussions (FGDs)
- Men age 18-49 who used a condom in last 3 months
- FGDs segmented by urbanity, age, and SES
- FGDs conducted in 3 administrative regions: Dar es Salaam, Mwanza, and Iringa

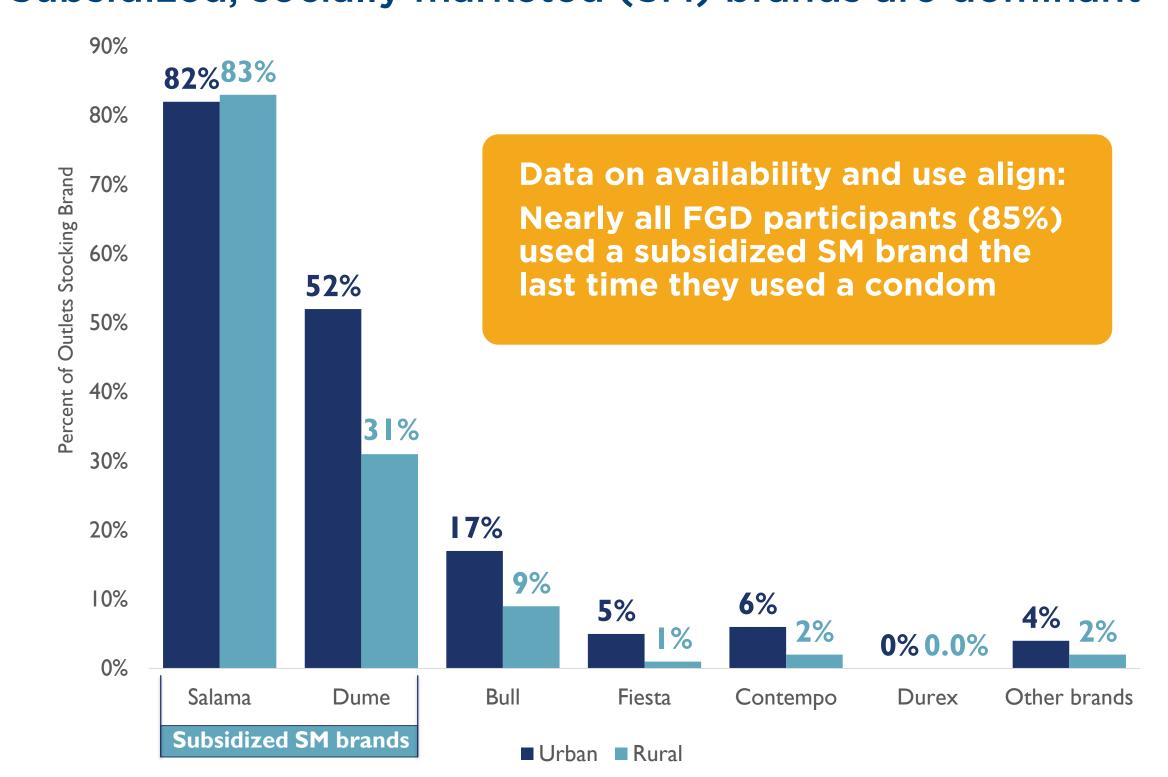
Quantitative

Retail audit of 4,823 outlets across
 Dar es Salaam and 9 additional
 administrative regions

dume

- Stratified, multi-stage sampling approach
- Outside of Dar es Salaam, 70% of outlets sampled were in urban areas; 30% were in rural areas

Subsidized, socially marketed (SM) brands are dominant

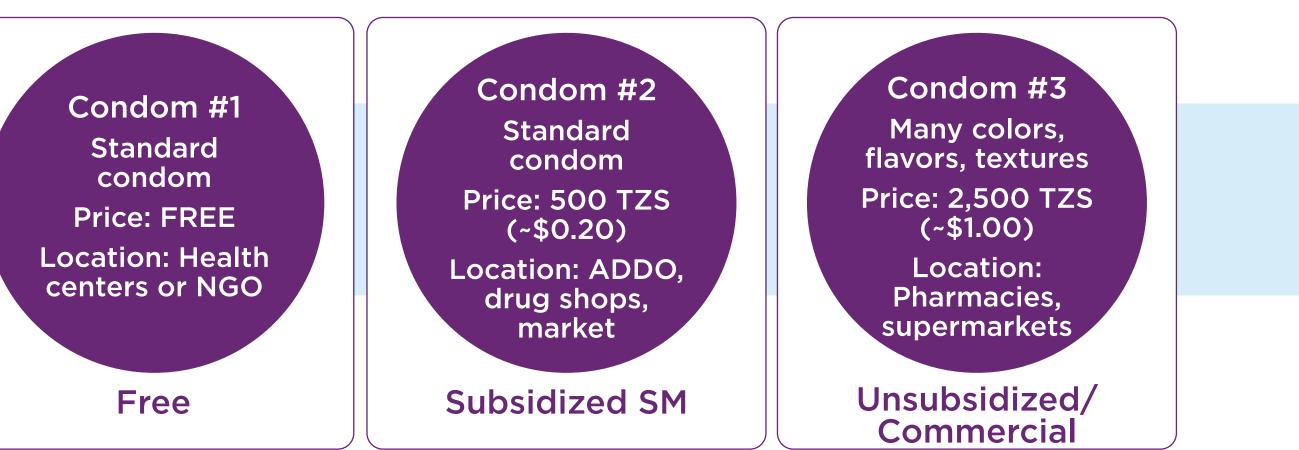


Over-subsidization of current market diminishes consumers' consideration of price

- Because of high availability of socially marketed condoms, consumers perceive the subsidized price to be the default price
- Consumers are conditioned to expect a low price-point for condoms
- With low price as a given for most FGD participants, price was one of the least influential determinants of their condom selection

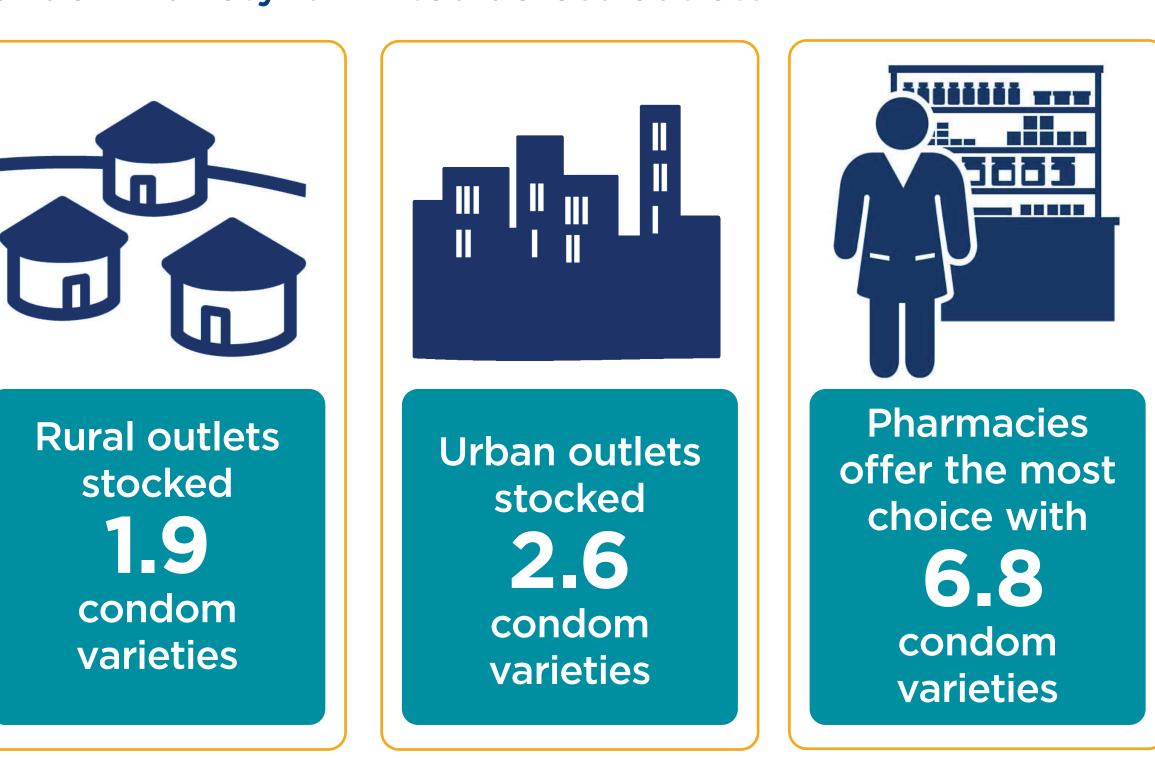
With money in hand, are consumers willing to buy unsubsidized condoms?

- FGD moderators gave each participant 5000 "shillings" (~\$2.00 USD) to spend on condoms or to save and use elsewhere
- Participants selected between the following condoms

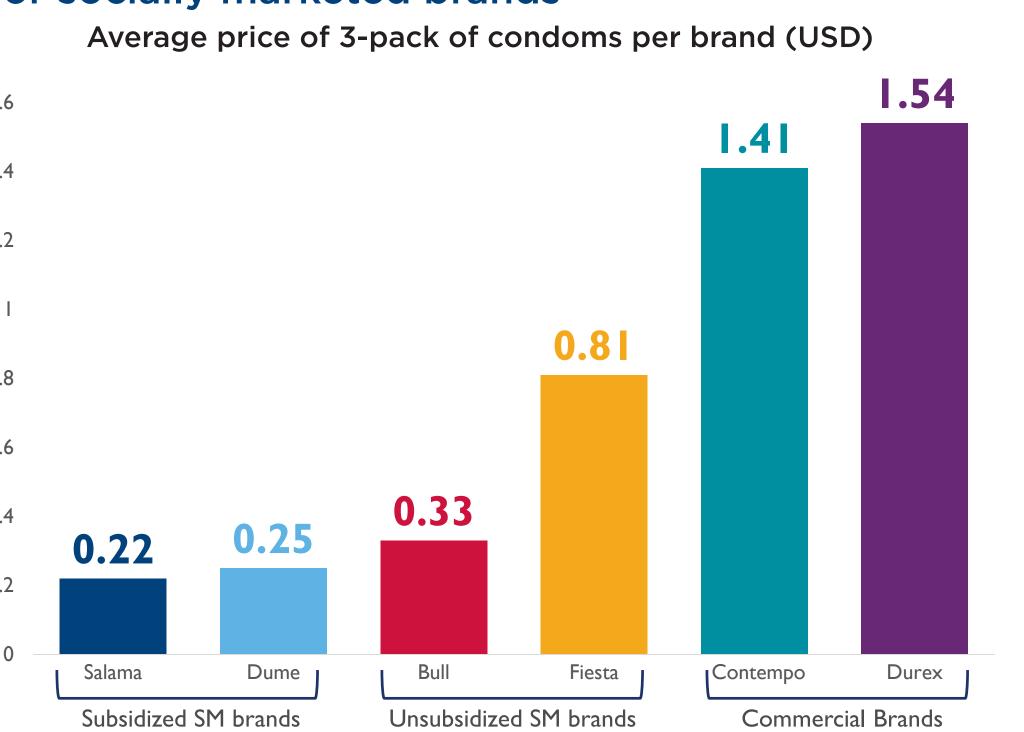


Results

Condom variety is limited across outlets



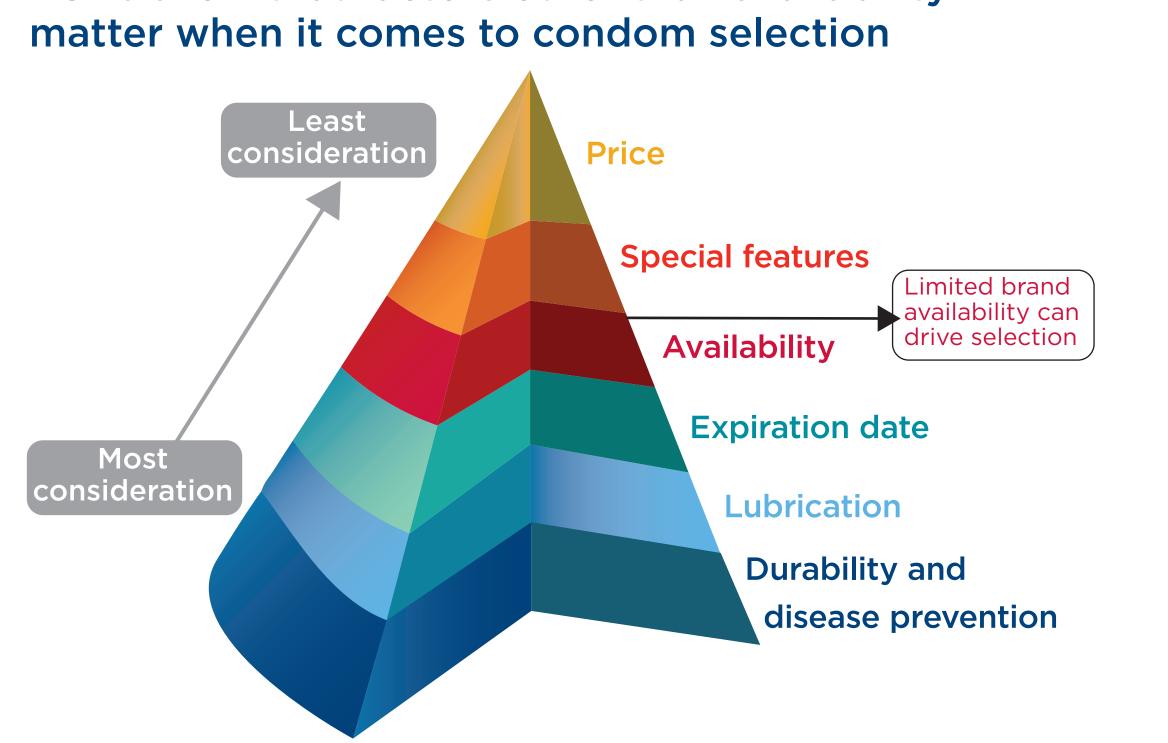
Across outlets, prices for commercial brands dwarf prices for socially marketed brands



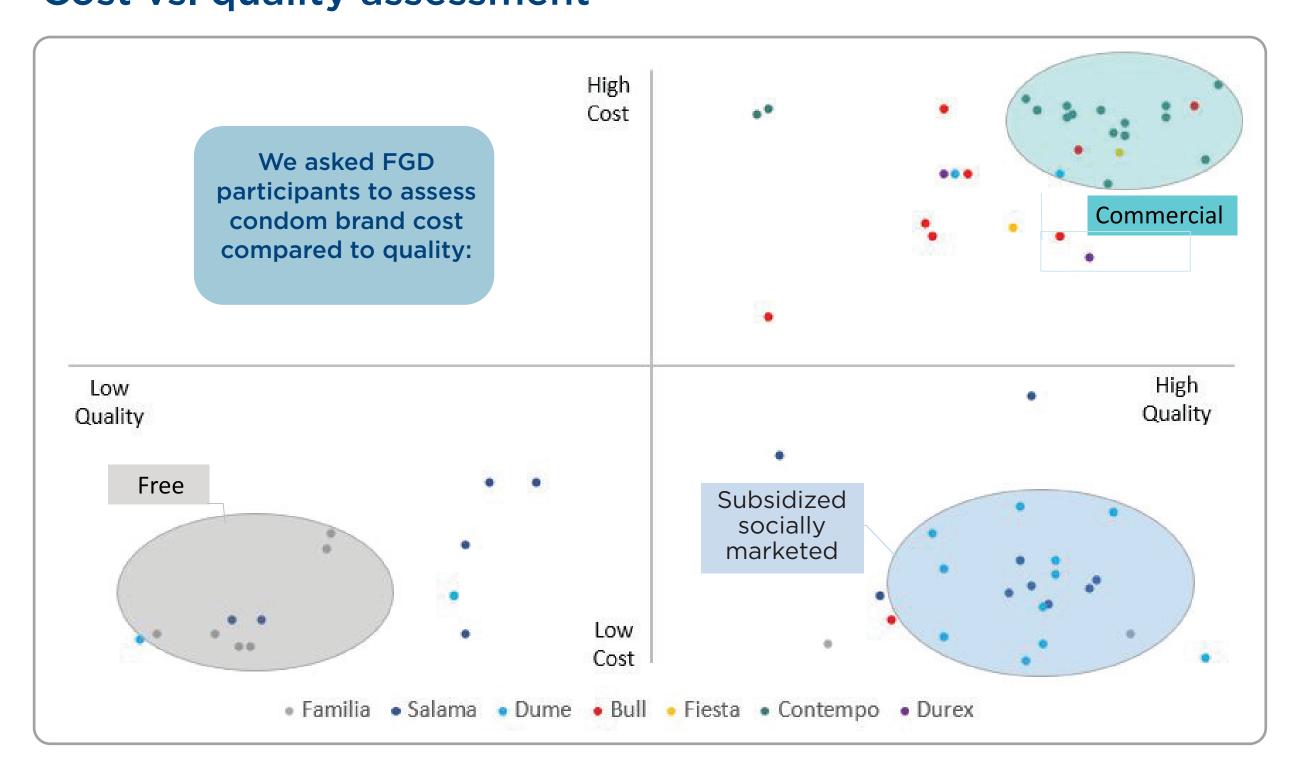
"Salama and Dume, we buy them
because of habits. To buy a condom with
a high price, we are not used to that. The
biggest habits are the condoms of 500
and 1000 shillings...the body gets use to
it, even the brain gets used to it."

- Urban, older, high SES

FGDs show that factors other than availability



Cost vs. quality assessment



Most men, even high SES, selected the socially marketed condom

- 59% selected the subsidized SM condom
- 67% among high SES
- 22% selected the free condom
- 19% selected the unsubsidized/commercial condom
- Even with money in hand, most men prefer to maximize their value for money
- There is some willingness to pay (WTP) for more expensive condoms when money is in hand

Conclusions

Overarching perceptions

- Socially marketed condoms viewed as high quality and affordable
- Commercial condoms viewed as unaffordable and have only marginal quality improvements (such as increased durability) compared to SM brands
- Perceived limited availability, especially in rural areas
- Free condoms viewed as poor quality
- Reportedly not trustworthy because they are free
- Perceived as poorly lubricated and not durable

Findings warrant a re-examination of condom pricing and distribution

- Widespread availability of heavily-subsidized condom brands have displaced commercial condoms
- Better targeting of subsidized condoms towards consumers with financial limitations could potentially generate space for unsubsidized and commercial condoms in mass market outlets
- The conditions in which there is WTP for unsubsidized and commercially-priced condoms suggests potential for targeting these condoms to urban consumers with fewer financial limitations
- Improved market segmentation will ultimately result in a more efficient, equitable, and sustainable condom market in Tanzania

For more information, please visit www.shopsplusproject.org or contact: Tess_Shiras@abtassoc.com



