



POUR ELLE

BRUSSELS | 20-22 MARCH 2018

**18TH GENERAL MEMBERSHIP MEETING OF THE
REPRODUCTIVE HEALTH SUPPLIES COALITION**

"The female condom: lessons learned and opportunities for expansion"

Chastain Mann
Marina Tiroyan
Denise van Dijk



POUR ELLE

BRUSSELS | 20-22 MARCH 2018

**18TH GENERAL MEMBERSHIP MEETING OF THE
REPRODUCTIVE HEALTH SUPPLIES COALITION**

The Woman's Condom: Lessons learned from Malawi and considerations for female condoms in West Africa

Chastain Mann
Mann Global Health
22 March 2018



Whisper Woman's Condom Pilot

2014-2017

Malawi

HIV prevalence (15-64) – 10.6%
Higher among women (12.8%)
compared to males (8.2%)

Modern Contraceptive Prevalence Rate 58%

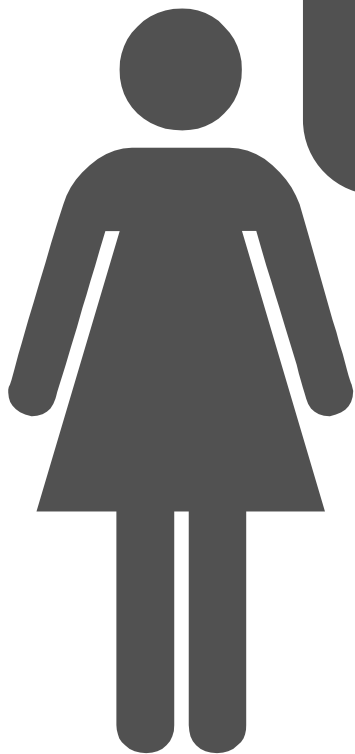
Most popular methods are
injectables (30%)
implants (12%)
female sterilization (11%)

*Female condoms are well known, but
current use is very low (<1%)*

Sources: MDHS 2015-16



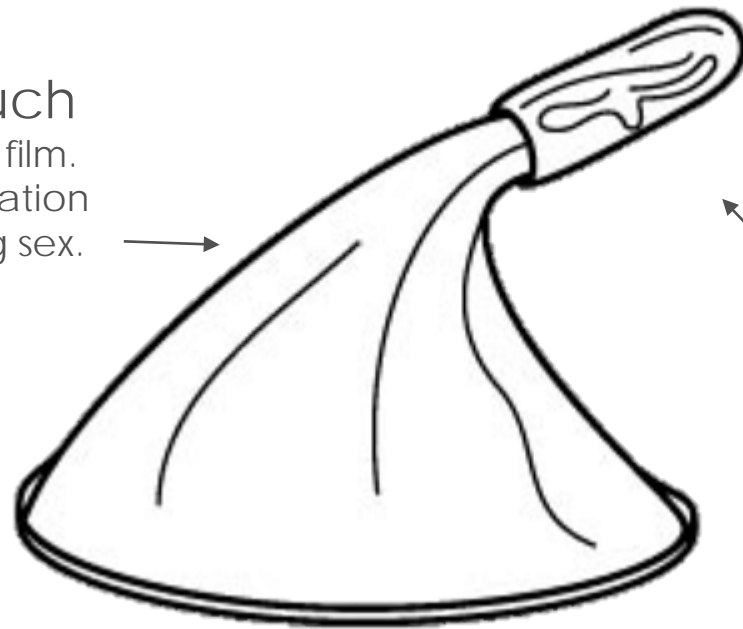
Why is female condom use so low?



- *Gaps in coordination, supply, and distribution*
- *Funding challenges, including limited resources for demand creation*
- *Resistance to female condoms on socio-cultural or religious grounds, as condoms are often associated with promiscuity*

Woman's Condom

Condom Pouch
Thin, polyurethane film.
Provides good sensation
and comfort during sex.

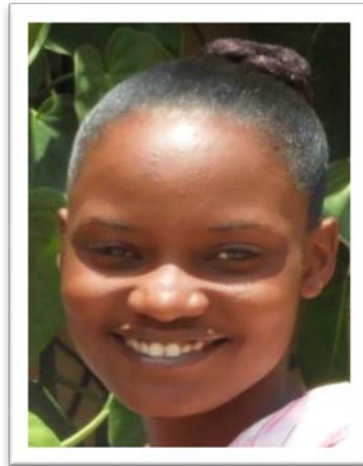
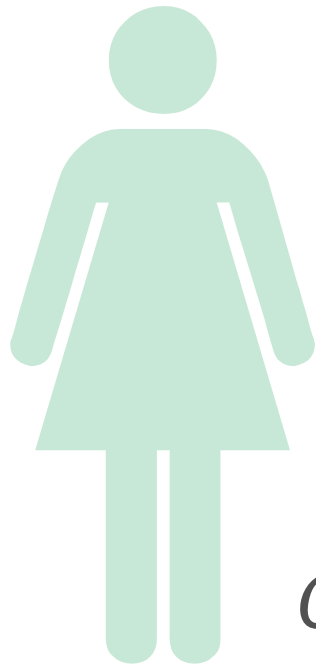


Insertion Capsule
Dissolving capsule made of
polyvinyl alcohol. Eases
handling and insertion.
Ingredients leave the
woman's body with her
natural vaginal secretions
after use.

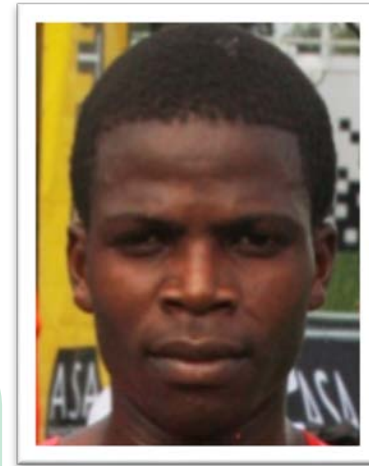
Outer Ring
Soft, polyurethane ring.
Hugs the body, provides
comfortable, flexible
coverage of external
genitals.

Foam Shapes
Small, thin sections of
foam. Cling lightly to
vaginal walls to ensure
stability of condom
during sex.

Archetypes: Consumers

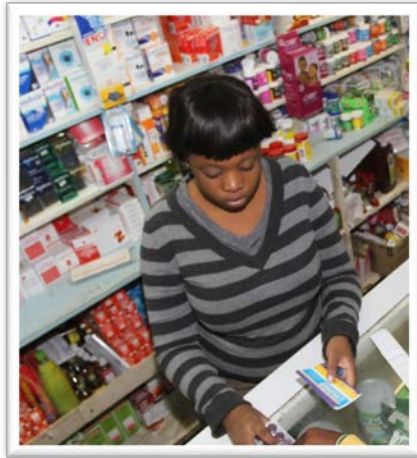
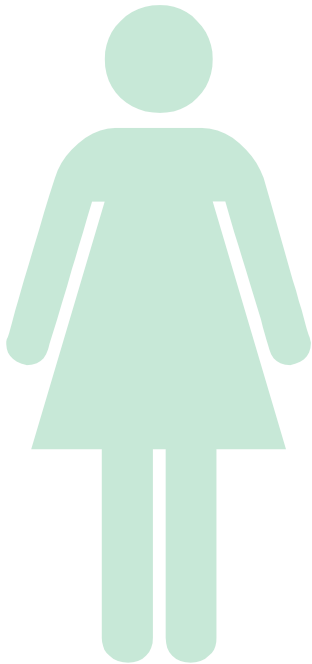


Cynthia (20)

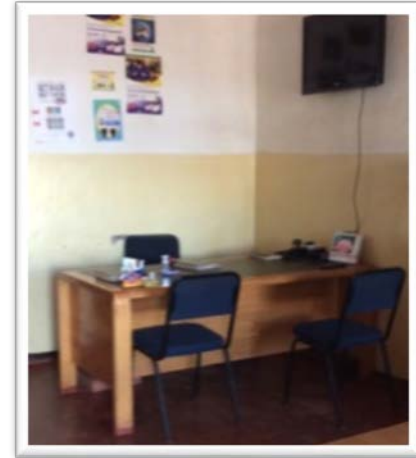


Ben (24)

Archetypes: Providers



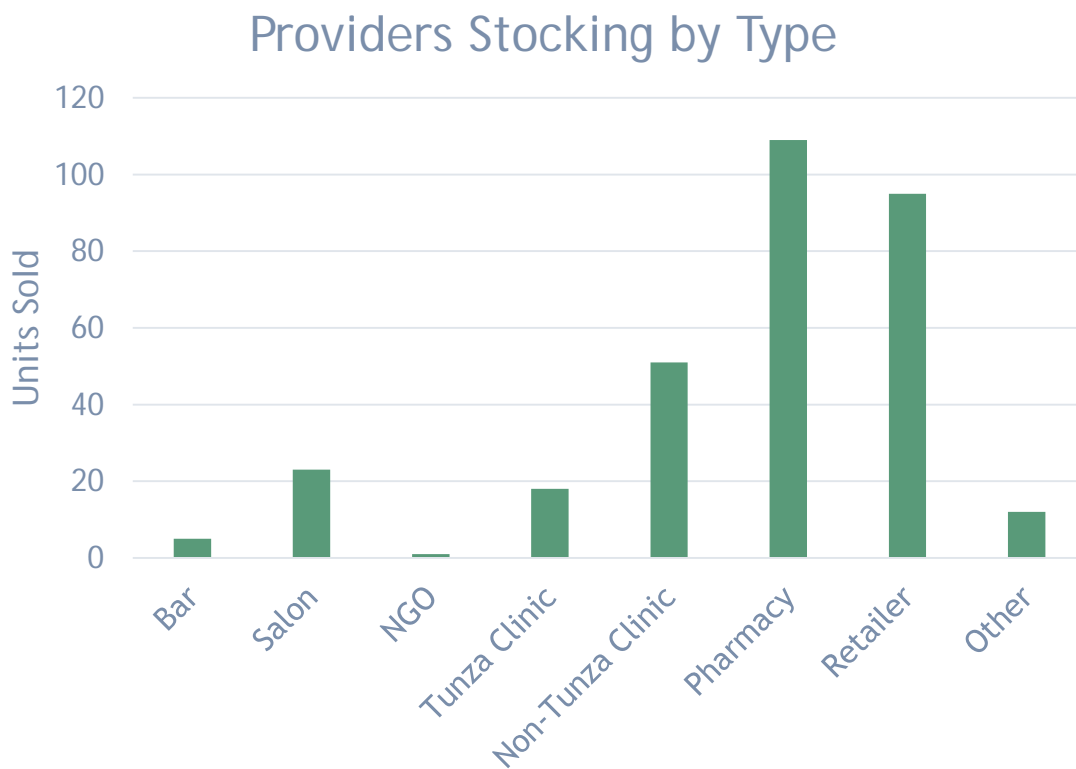
*Gladys,
Pharmacy
Owner*



*Dr. Banda,
Clinic Owner*

Whisper Distribution & Outreach

Region	Total Units Sold
Lilongwe	5076
Blantyre	1608
Mzuzu	2224





Whisper Post-Market Research

February 2017



Study Objectives & Methodology

- Gain a deeper understanding of the:
 - Retailer experience with Whisper Woman's Condom
 - Consumer experience with Whisper Woman's Condom
 - Market factors that act as barriers to product uptake for Retailers and Consumers

Study Type	Descriptive Market Assessment
Data Collection Method & Tools	One-on-one in-depth interviews with Consumers and Retailers using a structured, tablet-based questionnaire.
Study Locations	Urban areas where <i>Whisper Woman's Condom</i> is distributed: Lilongwe, Blantyre, Mzuzu
Participants	<ul style="list-style-type: none">• Retailers (n=40)• Consumers (n=41)

Consumer Results: Demographics & Access

- Average age: 27 years old
- Over half were university educated
- 41% were married or in a steady relationship
- Only 44% knew of a place to purchase Whisper, and only 29% ever had
- Most purchases occurred in a pharmacy, and were because consumers wanted to try something new; next most popular reason was the product design
- The top barriers to purchasing Whisper were shyness, fear, and embarrassment (39%), followed by the price (32% - average cited cost of 284MWK/0.39USD)

Consumer Results: Satisfaction & Use

Overall, how satisfied were you with your experience using Whisper?

Satisfied (88%)

Neutral (6%)

Dissatisfied (6%)

In your opinion, what was/were the best feature(s) of Whisper?

Soft and thin material (69%)

Lubricant Sachet (44%)

Easy to Insert (31%)

Stable during sex (31%)

What are some barriers that consumers might face in using Whisper for the first time?

Lack of knowledge of how to use the product (20%)

Fear of specific product features (foam shapes, insertion capsule) (10%)

Time-consuming insertion process (12%)

How likely are you to recommend Whisper to a friend?

Very likely (64%)

Somewhat likely (29%)

Neutral (5%)

Somewhat unlikely (2%)

Retailer Results: Access

Price Selling Whisper (per condom)

150 MWK
0.21USD

263MWK/ 0.36USD
(Avg)

350 MWK
0.48 USD



Are you currently stocking or have you previously stocked *Whisper*?

- *Currently Stocking (63%)*
- *Previously Stocked (12%)*
- *Never Stocked (24%)*

If not currently stocking, why not?

- *No client demand/wants to see demand before purchase (39%)*
- *Out of stock/sold out (28%)*
- *Discouraged by previous experience stocking female condoms (22%)*
- *Lack of information about the product (17%)*
- *Interested in other condom brands (11%)*

Retailer Results: Sales Experience

Has your experience stocking/selling Whisper been a positive one?

Yes (78%)

No (22%)

If yes, what do you LIKE about selling Whisper?

It gives women more options (93%)

It protects women against pregnancy and STIs (66%)

I believe in family planning (41%)

It has an attractive profit margin (34%)

If no, what do you DISLIKE about selling Whisper?

Demand for product is low (88%)

No return clients (38%)

Too expensive for clients at my facility (13%)

Key Findings

Consumers:

- Low awareness
- Willingness to pay
- Previous users of female condoms were more willing to purchase the new version
- High levels of satisfaction among users
- High level of stigma among Consumers associated with purchasing female condoms
- Male Consumers were willing to purchase Whisper

Retailers

- Challenging to convince Retailers to purchase the product for the first time. Want guarantee of client demand.
- Pricing Flexibility
- Need to coach Retailers on how to create a welcoming environment for Consumers, especially for females given the high level of stigma.

Opportunities

- Continue to highlight attractive features of the product and address concerns/misconceptions to drive trial
- Consider additional venues to reach target audience (institutions, bars, salons, universities)
- Step up demand creation activities, particularly in locations around retail outlets; engage men in outreach
- Support providers in counseling their clients on *Whisper*
- Work with Retailers to move away from the mentality that one female condom brand is enough
- Monitor price/ability to pay

Challenges

- Slow-moving to consumers due to several factors:
 - Stigma
 - Previous negative experience with female condoms
 - Embarrassment/shyness about the product
 - Size of packaging and confusion about what is in the package
- Translating interest in the product/initial trial into sustained use
- Understanding male willingness to purchase/use *Whisper* and shifting stigma around female purchase of condoms

Thank you!





POUR ELLE

BRUSSELS | 20-22 MARCH 2018

**18TH GENERAL MEMBERSHIP MEETING OF THE
REPRODUCTIVE HEALTH SUPPLIES COALITION**

Willingness to pay for female condoms: is there a potential in the commercial market?

Marina Tiroyan
i+solutions, the Netherlands
27 October 2017

Female condoms: current situation in low- and middle income countries

- Available in public and/or private non-profit sectors
 - Provided free of charge or subsidized
- Decline in donor funding
- Limited access
 - High prices
 - Poor uptake
 - Low demand

Willingness to pay studies

Botswana - upper-middle income

Market research on access and utilization of male and female condoms in Botswana

Kenya - lower-middle income

Willingness to pay for male and female condoms among urban Kenyans

Mozambique - low income

Willingness to pay for female condoms in Mozambique

Objectives

To obtain better understanding on:

- Consumers ability and willingness to pay for female condoms and ideal price points;
- Providers' perspective on consumers' willingness to pay for condoms;
- Factors (barriers and enablers) that influence willingness to pay.

Methodology

- Questionnaires - willingness to pay
 - consumers
 - providers
- KII interviews

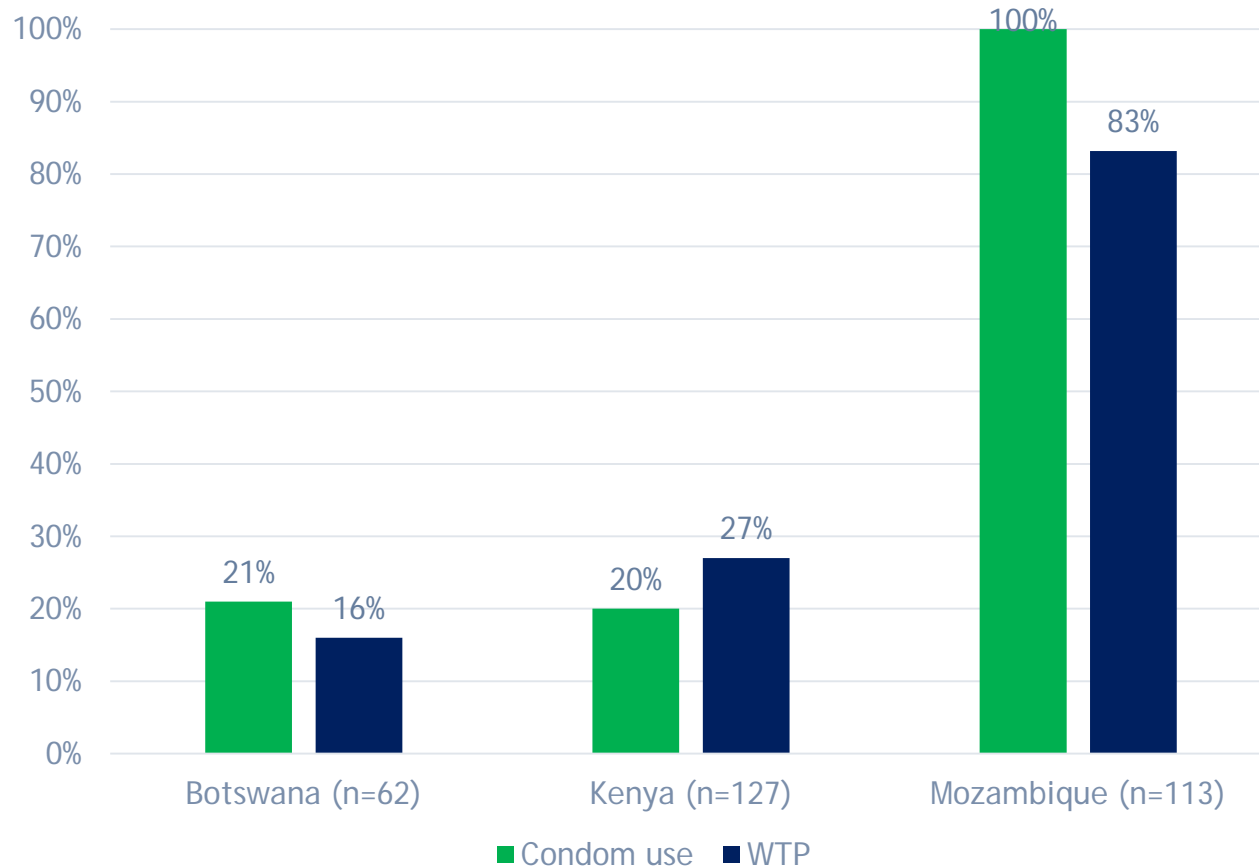
Country	Location	Participants
Botswana	Gaborone and Ngamiland provinces	Consumers (n=62) Providers (n=14)
Kenya	Nairobi	Consumers (n=127) Providers (n=10)
Mozambique	Maputo and Inhambane provinces	Consumers* (n=113) Providers (n=13)

Consumers: demographic profile

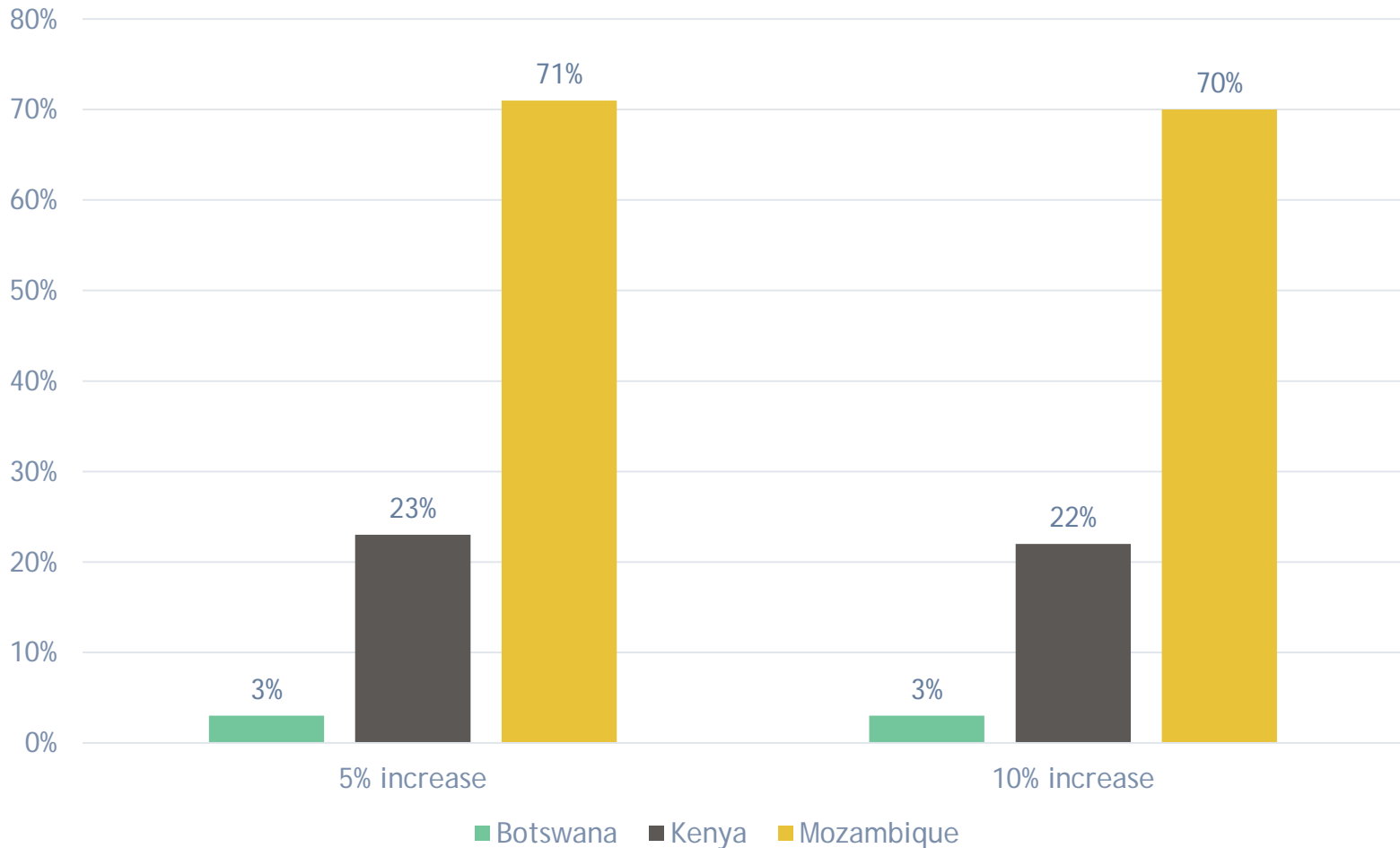
Country	Gender	Age	Education	Married/ in stable relationship
Botswana	female - 54% male - 46%	18-24 years - 16% > 25 years - 84%	University - 45%	45%
Kenya	female - 54% male - 46%	18-24 years - 46% > 25 years - 54%	University - 67%	65%
Mozambique	female - 80% male - 20%	18-24 years - 43% > 25 years - 57%	Secondary - 55%	44%

- Attendees of health facilities
- Youth population in universities, local NGO network
- Programs beneficiaries

Consumers: condom use and willingness to pay



Consumers: willingness to pay



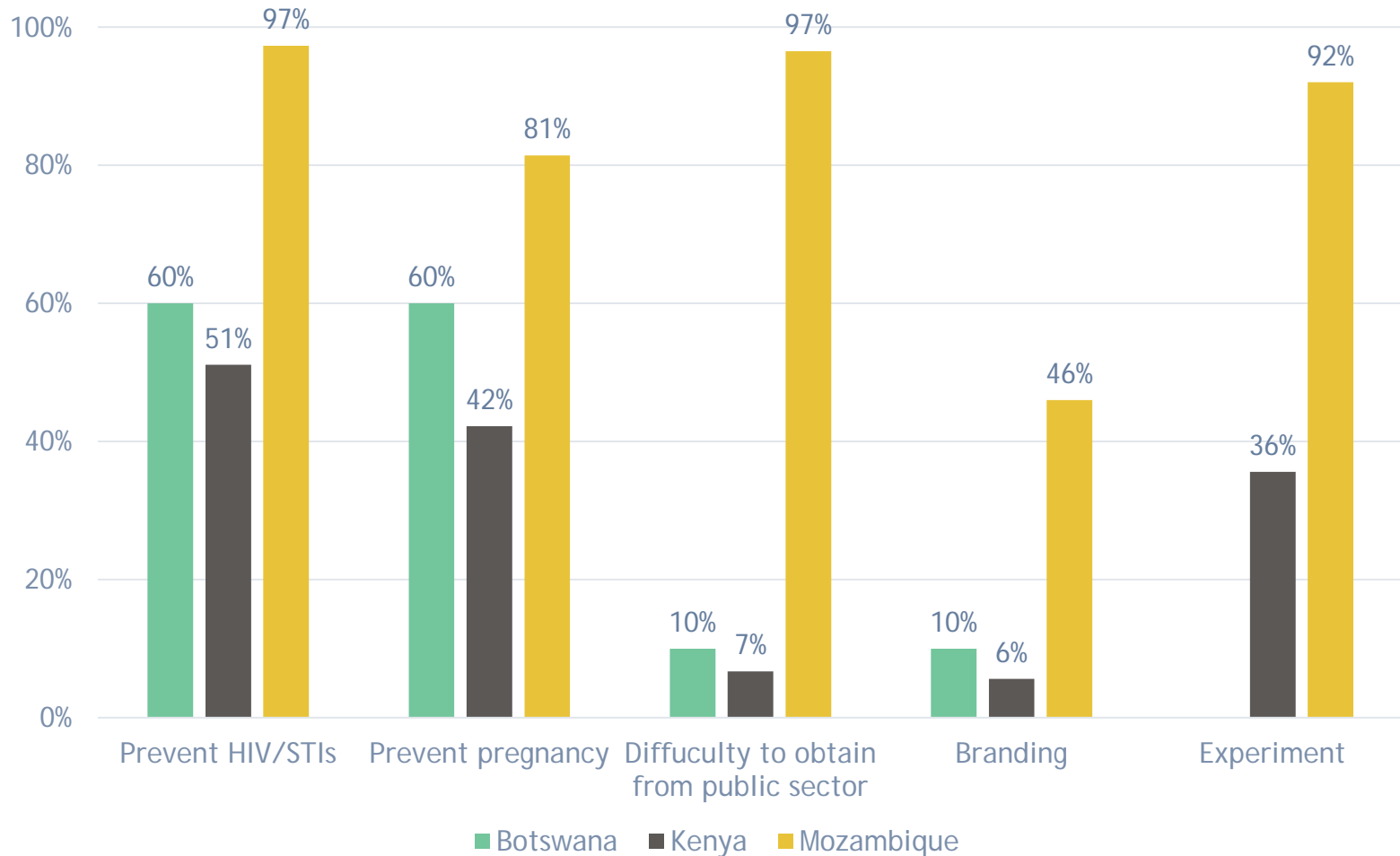
Consumers: the highest price

Botswana - US\$ 0.55/unit

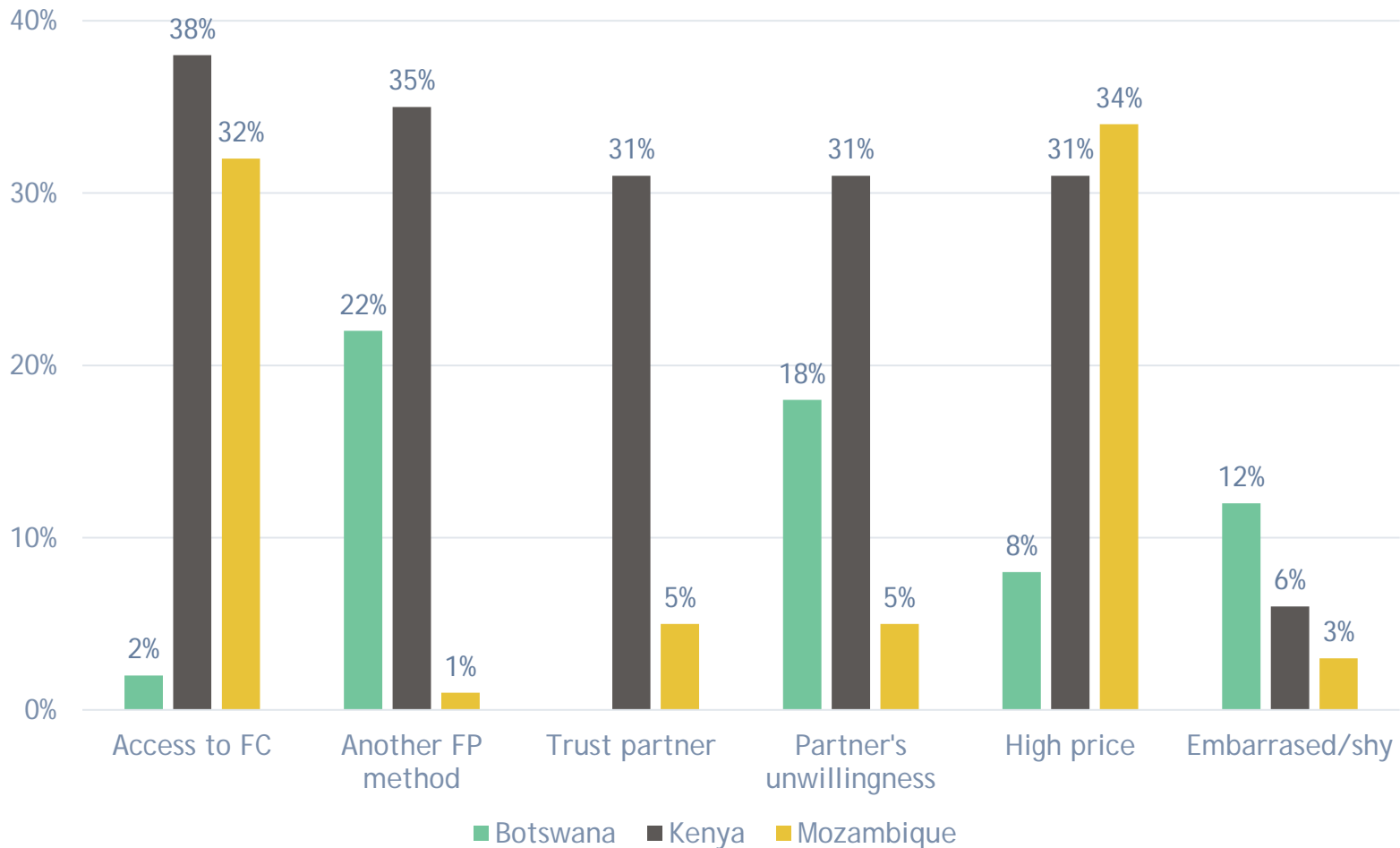
Kenya - US\$ 1.42/unit

Mozambique - US\$ 0.83/unit

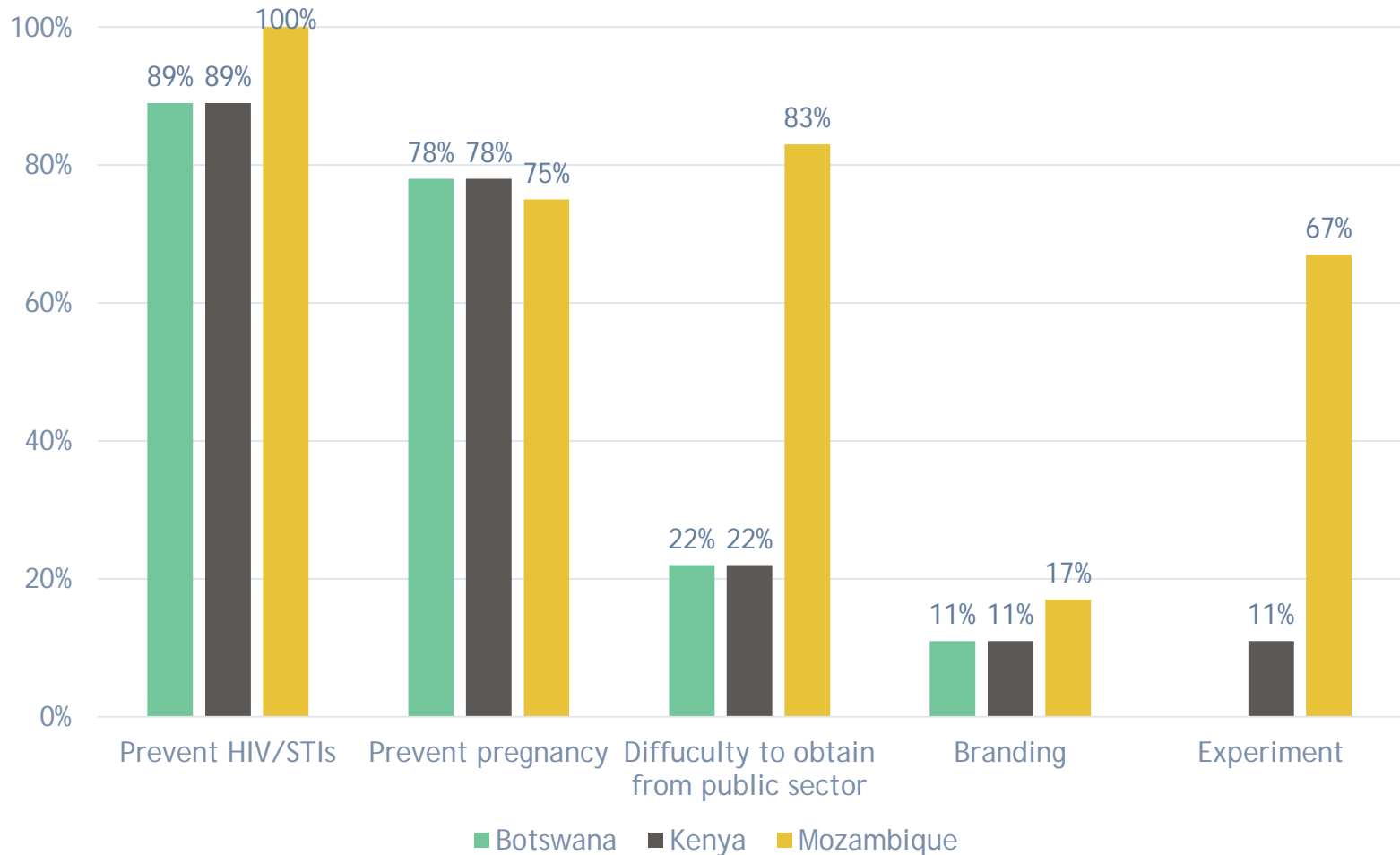
Consumers: enablers for WTP



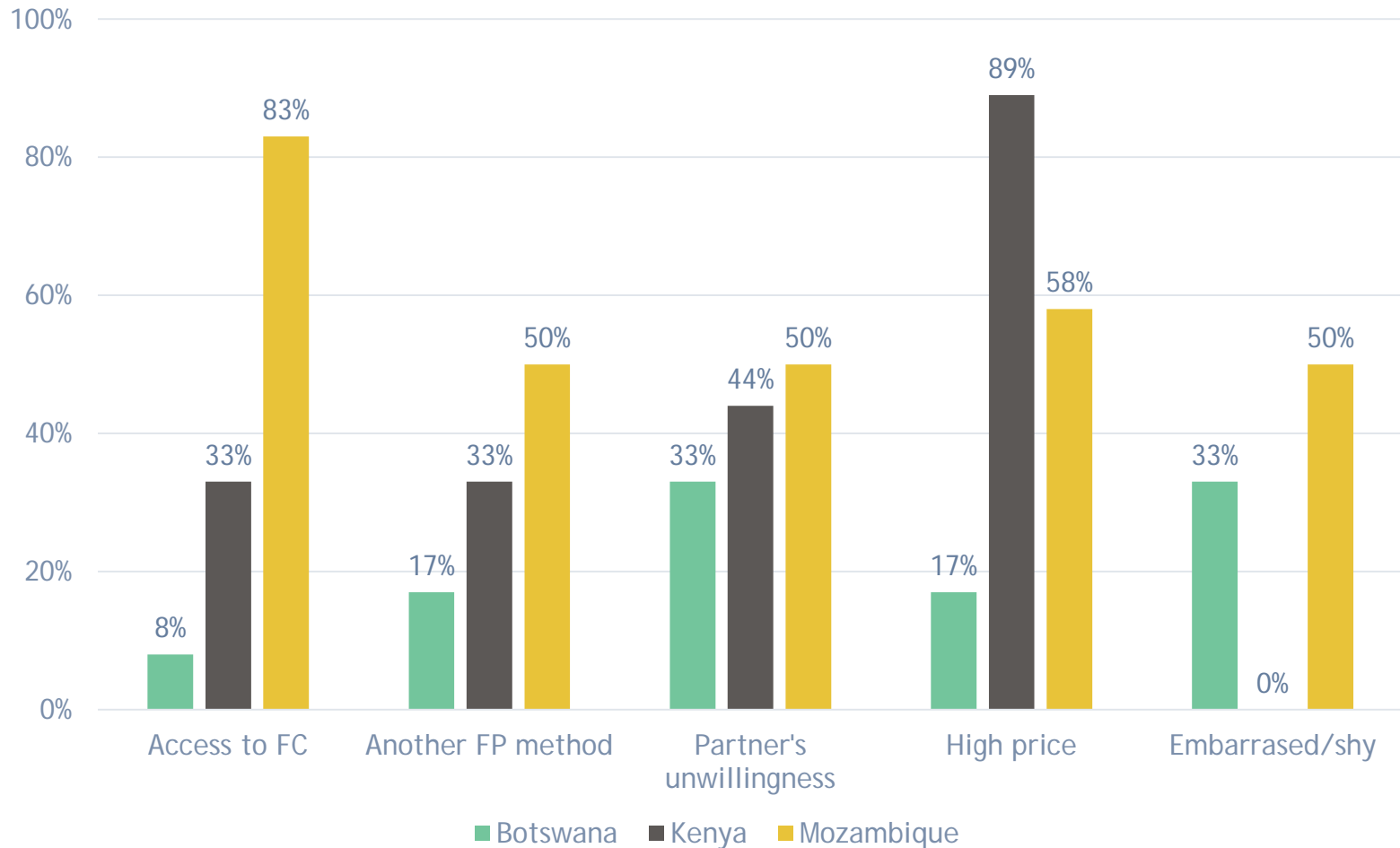
Consumers: barriers for WTP



Providers: enablers for WTP



Providers: barriers for WTP



Key findings

- Main enablers for WTP
 - to prevent pregnancy
 - to prevent HIV/STIs
- Main barriers
 - Poor access
 - High price
 - Partner influence
- The highest price is equal or below the current market price

Conclusion

- Potential for private commercial sector
- Public sector policy
- Determine pricing policy, test pricing strategies
- Improve supply chain management
- Increase service delivery/distribution points
- Improve visibility on demand and consumption from all sectors
- Focus on youth and advocacy
- Further research covering rural and remote areas

Acknowledgment

- Universal Access to Female Condoms Programme
- Dutch Ministry of Foreign Affairs
- Share-Net International
- Pathfinder International, Mozambique
- Ministry of Health, Kenya
- Muthaa Community Development Foundation, Kenya
- Ministry of Health and Wellness, Botswana
- UNFPA country office, Botswana

THANK YOU





POUR ELLE

BRUSSELS | 20-22 MARCH 2018

**18TH GENERAL MEMBERSHIP MEETING OF THE
REPRODUCTIVE HEALTH SUPPLIES COALITION**

*The FC2 female condom:
guaranteed access as the key to
success in public sector*

Denise van Dijk
President, Female Health Company
22 March 2018

FC2 Global Female Condom Market (Public Sector)

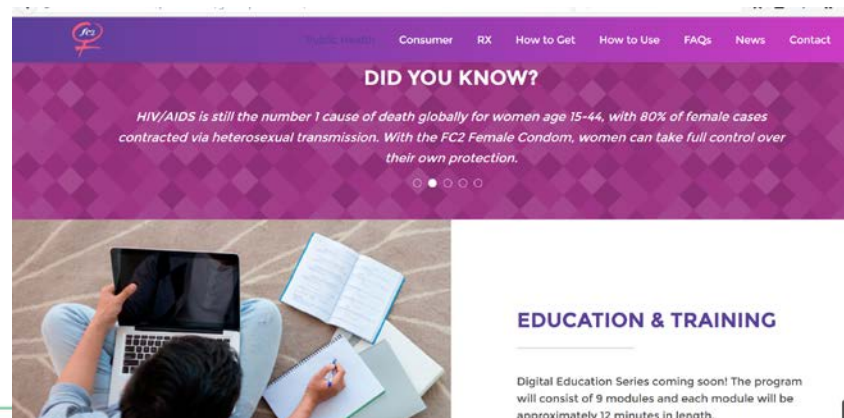
- Fluctuates annually between 20-70 million units globally, average of 50 million units
- This year lowest procurement of female condoms in a decade, less than 30 million
- Demand creation and sustainability are severely jeopardised by major decrease in supply
- FC is the first thing to go as it is seen as:
 - Not in demand
 - Not accepted
 - Too expensive

Debunking the excuses

- FC2 is Accepted!
 - 2017: UNFPA Uruguay research 77% of average women rated the FC2 as good or very good and 81% would continue using it in the future.
- FC2 is in Demand!
 - 2017: The national female condom evaluation in SA funded by PEPFAR and conducted over 2 years, shows that 99% of all FC2 carried by clinics gets distributed.
- FC2 provides Return on Investment!
 - In Kenya every \$1,- in procurement provides an ROI of \$1,94 in Nigeria this is \$3,20.

Guaranteed Access model

- Map out distribution outlets for FC2 based on the procurement quantity
- Develop IEC materials in local languages
- Enlist local master trainers
- Develop target group specific trainings
- Only train people who are part of the community in which access to FC2 is in place linking demand creation with guaranteed access.



Example: FC2 in South Africa

- Present in SA since the introduction of FC1 in 1998
- FC2 became available in 2010
- Since 2012 also other female condom brands
- Current tender volume 52 million FCs over 3 years
- 27 million FCs distributed in 2015-2016 alone
- FHC provided training since introduction of FC2 to all distribution outlets

Key is to link training to guaranteed access



SA National FC Program Evaluation

Results:

- FC2 which was accompanied by training had a distribution rate of 99%
 - As compared to 2 other female condom types with distribution rates of 34% and 7% and who did not provide training
- The level of unprotected sex (no MC or FC use) declined from 43.3% at baseline to 8.4% at 12 months.
- 80% of women felt that FC use placed the woman in charge
- At their one month interview, 58% of men said that the FC was 'better or much better' than the MC, and at 12 months this rose to 74%.

Conclusion

Demand creation and Guaranteed access (supply) need to be linked in order to create an impact for the FC2 female condom. In turn, the female condom will then be accepted, in demand, and provide a financial return on investment!



Questions

