



# databoom

## Can All (Condom) Boats Rise Even in an Economic Crisis?

An experimental study to test the impact of social  
marketing on Zimbabwe's condom market



## EXECUTIVE SUMMARY

### AN EXPERIMENTAL STUDY TO TEST THE IMPACT OF SOCIAL MARKETING ON ZIMBABWE'S CONDOM MARKET

Zimbabwe has one of the strongest condom programs in Africa and, over time, the government and international donors have made significant investments in condoms to prevent the spread of HIV. By 2016, the future of condom funding was uncertain. International donors were questioning their investments and were focused on creating a self-sustaining condom market. Removing financial support could mean condom insecurity and losing gains made in HIV/AIDS prevention through condom programming. We tested the hypothesis that the right investments in condom social marketing could help “all boats rise” and improve the market for condoms. The study provided evidence that donors and decision-makers could use to inform further investments in Zimbabwe and other condom markets.

#### SERVICES

Experimental Study Design

Health Market Analysis

Strategy and Communications

Team and Stakeholder Engagement



# Can All (Condom) Boats Rise

## Even in an Economic Crisis?

In Zimbabwe, HIV prevalence among men and women of reproductive age is 13%<sup>1</sup>. Zimbabwe has one of the strongest condom programs in Africa and, over time, the government and international donors have made significant investments in public sector (free) condoms and social marketed condoms (at a subsidized price) to prevent the spread of HIV. Since 1996, Population Services International (PSI) has been operating the largest condom social marketing (CSM) program and has nearly a quarter of the market share.

By 2016, the future of condom funding was uncertain. International donors were questioning their investments in Zimbabwe's condom market. Removing financial support could mean condom insecurity and losing gains made in HIV/AIDS prevention through condom programming. Donors were focused on creating a self-sustaining condom market: one where social marketed condoms operated at cost recovery, free condoms would be better targeted to those most in need, and an increased number of commercial brands would appear on the market.

**That's where**

**we came in**

Databoom supported an experimental study to measure the impact of CSM for increasing overall supply and demand for condoms on the Zimbabwe market. In collaboration with PSI, we tested the hypothesis that the right investments in CSM could help “all boats rise” and improve the market for all condoms. The study provided evidence that donors and decision-makers could use to inform further investments in CSM and support for the overall condom market.

This study was a randomized control trial comparing five experimental and five control districts. Baseline and follow-up surveys were conducted among consumers and the trade. The intervention took place after a steep increase in the price of the social marketed condom, Protector Plus (PP).

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<sup>1</sup> UNAIDS 2018



After the price increase, PSI repositioned PP as the “caring and loving” condom to appeal to consumers who view sex in terms of intimacy and caring. Repositioning PP was important for segmenting the market and to avoid crowding out the commercial sector. PP had also been acting as a “pseudo” and costly public sector condom that was competing with the government’s free condom. This series of photos represents the “caring need state” PSI used for PP’s repositioning and to distinguish it from other condoms on the market.



In addition, PSI created new, tamper-proof packaging to increase confidence among consumers. New packaging was also intended to enhance value in the mind of the consumer, in light of the price increase.

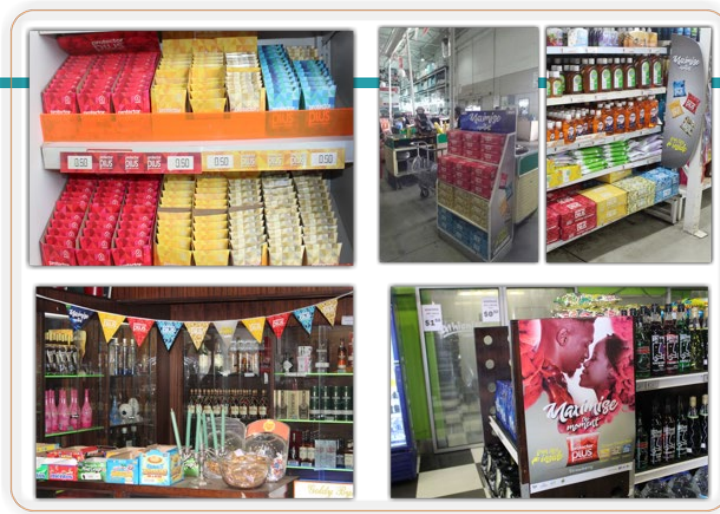
### Previous Packaging



### New Packaging



Both experimental and control arms benefitted from mass media promotion of PP (radio and social media), basic distribution of PP, and media bursts to promote PP during key periods of the year. The experimental arm included increased product visibility in stores (as featured below), extra PP in-store promotions, community-level interventions in high-risk venues like bars, and improved relationships with the trade to test the impact of higher intensity CSM activities on study outcomes.







All of this took place while the economic and political context in Zimbabwe was rapidly deteriorating. By the time baseline surveys among consumers and traders were completed, the economy had deteriorated to such an extent that the purchasing power of consumers and the trade had declined significantly. Several intervention activities were also delayed or disrupted because manufacturers could not procure basic materials; for example, paper and ink for the new PP packaging.

In the experimental arm, PP recovered from the price increase and increased the value of the condom in the mind of the consumer. The price increase also opened opportunity for the commercial sector to enter the Zimbabwe market at lower price points. More efficient distribution systems also meant that PP reached cost recovery.

We uncovered insights about the importance of demand generation and the trade's singular focus on price margins. We also found that development dollars would be better spent on demand generation (rather than just commodities) and supporting the government to collect better data to inform decision-making about the market overall.

STUDY HYPOTHESES AND CONCLUSIONS ARE SUMMARIZED IN THE TABLE BELOW

| Hypothesis   | Valid   | Conclusion  |
|--|---|---|
| Repositioning PP and changing PP packaging would increase consumer demand and sales for PP, despite the price increase                           |    | <p>PP supported a price increase when the right investments were made in branding and marketing</p> <p>Demand generation was essential for increasing perceptions of condom efficacy and equity in branded products</p> |
| Repositioning PP, changing PP packaging, and improving trade relations, would increase demand for PP among the trade, despite the price increase |  | <p>It was not necessary to over-invest in trader relations to maintain volumes if traders were satisfied with profit margins</p> <p>Costs spent on traders could be eliminated or reallocated depending on need</p>     |
| Positioning PP at the right price would mean less crowding out for the commercial sector   |  | Proper pricing and positioning of CSM prevented crowding out the commercial sector and one new commercial brand entered the market  |

| Hypothesis   | Valid   | Conclusion   |
|--|---|--|
| An increase in the price of PP would result in cost recovery   |  | <p>A price increase alongside more efficient distribution strategies led to 95% cost recovery</p> <p>When cost recovery is high, donor investments should focus on demand generation</p> |
| Supporting the public sector condom would improve attitudes toward condoms, increase public sector condom distribution, improve perceived availability of public sector condoms among consumers, and increase coverage for public sector condoms | Unable to measure   | There is an urgent need to invest in accurate data sources to track public sector condom distribution to measure improvements  |

## Impact

Despite the economic crisis, the Zimbabwe study demonstrated the effectiveness of well-executed CSM and the potential for “all boats to rise.” The donor is using the results of this study to inform a \$95 million investment Zimbabwe’s condom market. PSI is using the results to advocate with the government for accurate evidence to inform decision making and more deliberate strategies to target free condoms.