



Introducing V Condom to South Africa

Expanding the female condom market

PROTECTION OPTIONS FOR WOMEN PRODUCT DEVELOPMENT PARTNERSHIP
POW PDP | 2011-2015



The POW PDP Partners

The Protection Options for Women Product Development Partnership (POW PDP) was created to promote sexual and reproductive health, including the prevention of HIV/AIDS, by expanding access to the Woman's Condom. The POW PDP was supported by funding from the Netherlands Ministry of Foreign Affairs from 2011 to 2015.



PATH, an international nonprofit health organization, led decisions related to manufacturing, market development, and advocacy. Through PATH's country program offices in China and South Africa, PATH staff worked directly with country partners on market research, market tests of uptake and acceptability, and advocacy to raise awareness for female condoms in general, and for the Woman's Condom specifically.

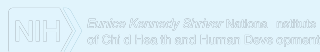


上海达华医疗器械有限公司
Shanghai Dahua Medical Apparatus Co., Ltd

Shanghai Dahua Medical Apparatus Co., Ltd (DAHUA) in China led Woman's Condom manufacturing production scale-up activities. They also led market development activities for the private sector in China. PATH licensed the Woman's Condom to DAHUA for manufacturing and commercialization.



CONRAD is a United States-based nonprofit organization that facilitates rapid development of safe, acceptable, affordable products for contraception, HIV, and other sexually transmitted infections. CONRAD is the regulatory sponsor of the Woman's Condom and developed and implemented the clinical study, A Randomized Cross-Over Study of Vaginal Semen Exposure and Clinical Failure Comparing the PATH Woman's Condom and the FC2 Female Condom. This study was funded directly from the United States Agency for International Development (USAID) to CONRAD.



Eunice Kennedy Shriver National Institute of Child Health and Human Development (NICHD) is a health research agency within the US government. NICHD conducts and supports clinical trials and other types of research that explore health and the process of human development from conception to old age. NICHD developed and implemented the clinical study, A Multicenter, Open-Label, Non-Comparative Study of the Safety and Contraceptive Efficacy of the Woman's Condom. Data from this study will become part of the Woman's Condom technical dossier and will assist in regulatory submissions. This study was funded directly by the US government through NICHD.

Contents

- 2 Entering an existing female condom market in South Africa
- 4 Exploring the market and developing V Condom brand for South Africa
- 9 Market testing to build the evidence base
- 20 Advocacy in South Africa: reinvigorating the female condom movement
- 24 Reflections on commercial market development for V Condom in South Africa
- 25 Moving forward in sub-Saharan Africa

Entering an existing female condom market in South Africa

South Africa is a multi-faceted, sophisticated country, characterized by diverse economic markets, populations, and health needs. Young people in South Africa are at high risk of unintended pregnancy and STIs/HIV. Male adolescents report high levels of sexual activity; having concurrent sex partners is common; and about 30% of young women aged 15 to 19 years become pregnant. These realities, combined with the country's relatively high maternal mortality and HIV infection rates, make it critical for women to have access to prevention tools that meet their needs.

Since 1998, the government has sought to help meet those needs by providing female condoms for dual protection through its public family planning programs. As a result, today South Africa lays claim to one of the most robust female condom programs in the world, with government procurement of female condoms increasing over the past several years and plans to expand the program even further. In 2008–2009, for example, South Africa distributed 3 to 4 million female condoms. The 2012–2016 National Strategic Plan for HIV/STIs/TB has set female condom procurement targets at a record high of 25 million units for 2016–2017. Government partners and civil society have been largely responsible for shaping female condom programs in South Africa; in fact, 98% of the product is distributed through female condom public-sector programs.

98% of female condoms are distributed through public-sector programs

Despite this growing distribution through public channels, potential remains to expand the reach of female condoms. Female condoms are still not well known across various consumer groups, and the private-sector female condom market is in its infancy. Myths and misinformation about the product remain among policymakers and potential users, and efforts to cultivate new user groups need additional investment.

Because female condom programming is relatively well established in South Africa's public sector, the Protection Options for Women Product Development Partnership (POW PDP) originally looked to other countries in the sub-Saharan region when assessing where to engage in market development for the Woman's Condom. After scoping market opportunities in several African countries and consulting with regional marketing experts, the POW PDP team eventually determined that South Africa was, in fact, a key for regional market entry: If the Woman's Condom could gain traction among target audiences in South Africa, the country's network of distribution channels and strong economy could facilitate market entry throughout the region. Using these existing channels could leverage the limited funds available for market development and facilitate future scale-up and market access in other countries.



A product development partnership to add protection options for women

In 2011, PATH received funding from the Netherlands Ministry of Foreign Affairs to support the POW PDP. From 2011 to 2015, this global partnership focused on applying total market approach strategies to create sustainable markets for the Woman's Condom. The project undertook a wide range of activities critical to building demand and preparing for product introduction—including advocacy, market research and testing, evidence-building, relationship-building with distributors, commercialization, regulatory approval, and product registration. Country-specific work focused on South Africa and China.

The POW PDP's activities in South Africa focused on exploring potential markets, implementing market tests, and enhancing political will through advocacy for female condoms. **In South Africa, the Woman's Condom is marketed under the brand name V Condom.**

rrtMedcon—the only male condom manufacturer in Africa, based in Durban—was selected by the POW PDP as the partner to lead market introduction of V Condom in southern Africa. A range of additional partners across the country supported the POW PDP's work in market research, market tests, and advocacy activities to build awareness and strengthen the environment for female condoms.



Exploring the market and developing V Condom brand for South Africa

In 2012, the POW PDP worked with a local market research firm and other partners involved in female condom introduction to conduct market research in three cities in South Africa: Bloemfontein, Durban, and Johannesburg. Results from the market research shaped development of V Condom—the South African brand for the Woman’s Condom.

Understanding audiences and consumer perceptions

The market research explored the potential role for V Condom in South Africa in a market where other condoms, both male and female, were already available. Although the government of South Africa plays the primary role in condom procurement for the public sector, the POW PDP believed the private sector represented a potential new market that could strengthen and expand the female condom market overall. A rapidly growing middle class, well-educated populations, and novel distribution opportunities were factors that suggested the time might be right to introduce the Woman’s Condom to South Africa.

The POW PDP designed its market research to better understand target audiences and distribution opportunities, as well as the perceptions held by potential consumers about female condoms. A better understanding of the market helped to identify challenges and opportunities, as well as drive brand development.

Market research key findings and implications included the following:

1 Target audiences should prioritize urban, middle-income men and women aged 18 to 35.

Market research defined key target audiences for V Condom as males and females from urban areas such as Johannesburg, Pretoria, Durban, Cape Town, Rustenburg, Bloemfontein, Port Elizabeth, Nelspruit, and Polokwane. Potential consumer groups included professionals and university students. The majority of these new consumers would likely be in the middle and upper economic levels, with incomes ranging from \$1,000 to \$10,000 per month. [see sidebar, Universities] Sex workers remained a small, but important, user group as well.

2 Product branding and marketing should appeal to consumer groups who prioritize “control” and “status.”

As part of the market research, a “need-state analysis” was conducted to define group characteristics of consumers who seek similar product benefits and attributes. This analysis indicated that the Woman’s Condom would initially appeal to users who prioritize “control” and “status” or consumers who are sophisticated and seek control over their lives. This group would likely have the fewest barriers and the greatest emotional connection with the Woman’s Condom and have the potential to be early adopters. Packaging should be classy and communicate protection, romance, and quality.



3 Consumers have a low awareness of female condoms; education and marketing are critical.

There is very low awareness and familiarity with female condoms in South Africa relative to male condoms. Most commercial consumers who are aware of female condoms have not considered incorporating them into their lives and remain unsure about the value of female condoms relative to male condoms. Awareness-raising and marketing must be a priority to build demand, especially among middle and higher income consumers. A celebrity spokesperson that could provide a high-profile endorsement and information should be considered.

4 Condoms are not used consistently, and protection is viewed as a male responsibility. Marketing and education should address male partner resistance.

Male condoms are widely promoted and are a primary protection method in South Africa. However, according to consumers, they are mostly used for contraception rather than disease prevention. Although they are widely available and accepted in South Africa, both women and men acknowledge that male condoms are not used consistently.

In South Africa, sexual decision-making is culturally driven by men, and female condoms are seen as potentially shifting the gender dynamic. While the unique selling proposition for female condoms is “woman-initiated protection,” this can be a social and cultural barrier for both women and men. This means that the product must be marketed to both women and men. Male partner resistance should be addressed; marketing to men should identify the special advantages to men of using female condoms to tip this resistance.

5 Distribution should include traditional and nontraditional locations, such as workplaces and universities.

In addition to more common distribution points like family planning nongovernmental organizations (NGOs) and shops, research identified new opportunities that should be tested, such as universities and companies that provide health and wellness programs for their employees. Cape Town and Durban were specifically identified as key markets for introduction.

Introducing V Condom to South African universities

To raise awareness about female condoms overall—and V Condom in particular—POW PDP staff provided information and training at 12 tertiary institution campuses across South Africa. Campus nurses, peer educators, HIV/AIDS Unit staff, health and wellness counselors, and students from the following institutions participated in the trainings:

- Cape Town Peninsula University of Technology
- Nelson Mandela Metropolitan University, Missionvale Campus
- University of Cape Town
- University of Free State
- University of Johannesburg
- University of Kwa Zulu Natal
- University of Limpopo
- University of North West
- University of Pretoria
- University of Stellenbosch
- University of Western Cape
- University of Witwatersrand

Following these sessions, some universities procured V Condoms for distribution on campus. After V Condom introduction, university students from several institutions then banded together and initiated a petition that will be sent to the South African government advocating for increased access to female condoms on campus.



Strengthening female condom markets through a total market approach

The POW PDP recognized that a market relying primarily on public-sector procurement for free or highly subsidized product distribution is vulnerable and does not lead to long-term sustainability. To offset this, the POW PDP sought to position V Condom—using total market approach strategies—to explore different distribution channels to diversify the market. A total market approach strategy is a “coordinated approach that responds to the variety of family planning needs in a country to ensure that it accommodates all clients—from those who require free supplies to those who can and will pay for commercial products.”^{*} This approach involves segmenting the market to understand needs and behaviors of the total consumer market and coordinating public- and private-sector market development to ensure the product is available to consumers at all levels—public sector, NGO/social marketing sector, and full commercial sector.

Prioritizing market development in South Africa also meant collaborating with like-minded organizations that employ private-sector approaches to develop female condom markets. For more than 15 years, the Society for Family Health/Population Services International (SFH/PSI) organization in South Africa has been involved in social marketing of male and female condoms through pharmacies and other outlets, as funds and supplies have allowed. Since 2012, SFH/PSI has been involved in a strategic effort to re-brand and re-launch the FC2 female condom as the Lovers Plus+ Inner Condom through marketing implemented by a new division called Company 158. The marketing group developed a campaign aimed at middle-income consumers to build a sustainable commercial market for Lovers Plus condoms.

The POW PDP developed its commercial strategy to build on this concurrent FC2 re-launch, aiming to identify new consumers who were attracted to V Condom and willing to purchase V Condom to augment their use of male condoms. This effort was intended to build toward a more sustainable market for female condoms overall by further segmenting the market.

^{*} Sarley D, Rao R, Hart C, Patyewich L, Dowling P. *Contraceptive Security: Practical Experience in Improving Global, Regional, National, and Local Product Availability*. Arlington, VA: John Snow, DELIVER; 2006.

“The female condom is out-dated and is no longer sexy... We must see that it is improved, just like the male condom... We need a more sexy condom.”

– HIV/AIDS activist, Zimbabwe, 2010



Photo: PATH/Patrick McKern

Creating V Condom brand for South Africa: pleasure, protection, peace of mind

The POW PDP chose rrtMedcon, a condom manufacturer in South Africa, as its commercialization partner to develop the regional brand for the Woman’s Condom. Using the market research, as well as a brand analysis that looked more closely at target markets, they developed V Condom for South Africa.

Since V Condom is more expensive than other female condoms due to its design, rrtMedcon developed the brand to appeal to consumers in the middle and upper economic levels and thereby help grow the overall female condom market. These consumers are characterized by valuing a high-quality product, making smart choices, and being in control of their experiences.

The V Condom brand reflects pleasure, protection, and peace of mind. Marketing for the brand focuses on romance and quality and emphasizes dual protection. A **V Condom website** was developed to share accurate and consistent information about V Condom and to help consumers keep informed about next steps toward introduction.



<http://www.vcondoms.co.za>

Pleasure + ease of use: unique features of the Woman’s Condom

The Woman’s Condom, branded as V Condom in South Africa, is the PATH-developed female condom product that was tested, marketed, and distributed during the course of the POW PDP’s work in South Africa. Over the last ten years, a team of designers, researchers, and health experts have tested the Woman’s Condom in multiple countries. This has ensured that the product is safe, acceptable, and easy to use and that it performs well during sex. The condom has unique features—designed through a user-centered development process—that allow for ease of use, acceptability, and good sensation for both partners. In comparative studies, some women and men have reported preferring the Woman’s Condom over other female condom products because it is easy to use.

The Woman’s Condom consists of a thin pouch, ring, and dissolving capsule that encloses four foam shapes. All parts of the Woman’s Condom are made of medical-grade material that is safe and has been used in medical products for years. The product is for one-time use only. The Woman’s Condom comes with a small sachet of water-based lubricant to be applied at point of use. This lets women and couples use the amount of lubricant that is right for them.

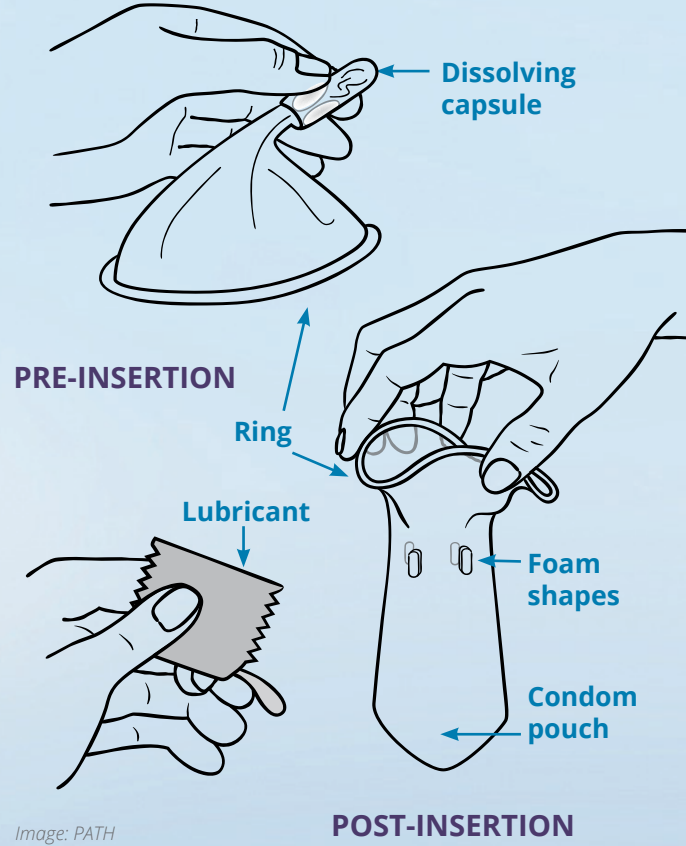


Image: PATH

Spotlight on rrtMedcon: V Condom partner for sub-Saharan Africa

rrtMedcon has a long history with male condom manufacturing and has consistently focused on quality. They are the only male condom manufacturer in sub-Saharan Africa and have sold male condoms to the South Africa National Department of Health, as well as to nongovernmental organizations and commercial outlets, since 1993.

rrtMedcon was selected as the commercialization partner for the Woman's Condom because they recognize the need to expand access to female condoms in South Africa to meet the reproductive health needs of women and men and are willing to take on the challenge of developing new markets to build toward sustainability. In 2013, rrtMedcon achieved South African Bureau of Standards (SABS) certification for the Woman's Condom, and developed the V Condom brand for the South African regional market.

rrtMedcon was first registered as Kohrs Medical Supplies in 1993, a family-operated company that imported and distributed condoms; the company soon developed manufacturing capacity and became a local supplier of male condoms. Richter Hi-Tech Sdn Bhd became a shareholder in 2001. Later Kohrs Medical Supplies Pty. Ltd rrtMedcon South Africa registered as a subsidiary of the Richter Rubber Technology (RRT) of Malaysia, a global manufacturer of male condoms and condoms manufacturing equipment. In recent years, the South African industrialist and analytical chemist Sikhulu Mtshali joined with rrtMedcon, and now serves as the executive chairman and director.

As of 2015, rrtMedcon has capacity to produce 230 million male condoms a year and sells its male condoms mainly to the national government, NGOs and retail outlets. The company supplies condoms to neighboring countries within the Southern African Development Community region. rrtMedcon employs about 130 people, 95% of whom are black women from rural areas.

rrtMedcon is an ISO-certified manufacturer of male condoms (ISO 9002, ISO 9001:2000, ISO 13485:2003, and ISO 9001:2008). The company factory is in Ballito—a fast-growing business hub located outside of Durban.



Left: rrtMedcon condom factory in Ballito.
Photo: rrtMedcon

Right: rrtMedcon and PATH presented results from the POW PDP market tests and insights about resources needed for the female condom market at the Global Female Condom Conference (Durban, December 2015).
Photo: PATH

Market testing to build the evidence base



Based on the market research and V Condom brand development, the POW PDP wanted to take V Condom to potential audiences. 'Real-life' market testing would allow them to test the market research findings and evaluate potential for V Condom to reach new target audiences through both private-sector markets as well as public channels where consumers were already receiving another brand of female condom for free.

The POW PDP conducted five market tests with two different partners, WISH Associates/African Gender Institute and MatCH Research, which were designed to explore both traditional and nontraditional distribution channels and to identify opportunities to reach consumers with an unmet need for dual protection who were not currently using male or female condoms.

The assessments explored **consumer uptake and use, packaging, key messages, and potential willingness to pay**. Data from these market tests will be used to inform future product introduction in South Africa.

This section includes an overview of the methodology, findings, and implications of each test, followed by an overall summary of results.

KEY RESEARCH QUESTIONS ?

- Would new audiences—particularly university students, private-sector workers, and men—find the Woman’s Condom acceptable and would they use it?
- What do users think about the product features?
- How would users react to promotion, packaging, and branding?
- With introduction of V Condom, would use of female condoms for protected sex acts increase?
- Are users willing to pay—and if so, how much?



Peer educators from HAICU at UCT campus raise awareness about V Condom.
Photo: WISH Associates/Marion Stevens



Young women in Durban learn about V Condom at a health awareness day celebration.
Photo: MatCH Research

WISH Associates market tests

Assessing attitudes about acceptability among female and male students at university campuses

PARTICIPANT PROFILE

Male and female students at two tertiary institutions: The University of Cape Town (UCT) in Cape Town and False Bay College (FBC) in Muizenberg

DURATION

6 months

V CONDOM DISTRIBUTION

- 760 V Condoms were distributed at UCT via three distribution points
- 540 V Condoms were distributed at FBC at two distribution points

PARTNER

Women in Sexual and Reproductive Rights and Health (WISH) Associates

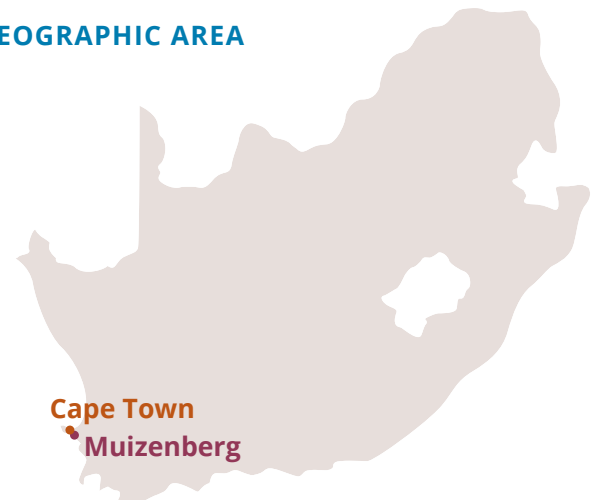
WISH Associates, founded in 2011, is a group of diverse sexual and reproductive health professionals and consultants based in South Africa dedicated to supporting the implementation of and progress toward improving the health and rights of women.



“Once you get “buy in” from the males, the uptake will be better for the female condoms.”

– Male focus group participant

GEOGRAPHIC AREA



MARKET TEST METHODOLOGY

The V Condom was distributed at multiple locations on campus, including clinic reception and consulting rooms, the student life center, the student counselor reception, and women’s bathrooms. To raise awareness, WISH Associates and university partners, including the HIV/AIDS, Inclusivity and Change Unit (HAICU)—the unit responsible for addressing HIV prevention at UCT—arranged four education and promotional events. At least 10,000 students or other members of the university and college communities received information about the V condom during the 6-month introduction, and approximately 1,300 individuals used V Condom.

Qualitative feedback was collected via various methods. WISH Associates facilitated focus group discussions (FGDs)—five at UCT and two at FBC—to explore attitudes toward sex, contraception, and protection from STIs/HIV, and use of male and female condoms. Five FGDs were among female students and two were among UCT staff. FGD participants were invited to provide additional feedback via text message or email, and 12 FGD participants agreed to provide this additional feedback. At study end, key informant interviews were conducted with stakeholders such as the HAICU director and V Condom distribution site managers for UCT and FBC.

SUMMARY FINDINGS

V Condom product features

Insertion using the dissolving capsule was intriguing to many. They liked the thin film of V Condom pouch and felt it was “much thinner” than other female condoms. They wanted more information about the safety of V Condom to know it had been tested and would not break. Students also requested information about both the safety of the capsule and the foam shapes.

Participants had diverse experiences of lubrication, some helpful and some inaccurate. For many it was the first time to talk safely about their sexual experiences and raise questions. More work needs to be done on messaging to providers and consumers about lubrication given that V Condom comes with separate lubrication that is applied at the time of use and also is a key element for pleasure.

Positioning and recommending the product

Students suggested promoting V Condom as a product that is new, fun, easy to use, and empowering. Many students who used V Condom said that they would be willing to talk to others about their experience.

Ease of use

Most who used V Condom did not report much difficulty and felt comfortable after a few uses. Many students said they would recommend V Condom based on comfort, fit, and insertion.

Willingness to pay

Many students suggested that they would be willing to purchase V Condom at prices ranging from ZAR 8 (USD 0.58) to ZAR 20 (USD 1.45), but most settled at around ZAR 15 (USD 1.09)*. Participants suggested that the V condom be sold in prominent spaces in pharmacies and grocery stores and be well advertised, as with other feminine hygiene projects like sanitary towels.

Uptake relative to other female condoms

In 2014, the South African government began procuring multiple brands of female condoms and distributing them through their public program. These market tests explored introduction of V Condom into an environment where students had access to other brands of female condoms, albeit in limited quantities. Despite availability of these other products, providers said V Condom was the one students asked for.

“It is the blue condoms (V Condom) that the students want. The others stay in the basket in the reception area.”

– UCT clinic director

At least 10,000 students or other members of the university and college communities received information about V Condom during the 6-month introduction, and approximately 1,300 individuals used V Condom.

*Exchange rate as of November 2015



MatCH Research market tests

Between August 2014 and July 2015, the POW PDP partnered with MatCH Research to implement four market tests. All four market tests followed a similar methodology and data collection process. To test distribution channels, V Condom was disseminated through different commercial and public institutions, and NGOs: a private factory, an NGO providing services to sex workers, an NGO providing sexual and reproductive health services to women and men, and a public tertiary educational institution. The tests also varied by demographics of target audience. Per local community guidelines, these sites already distributed male condoms, and female condoms when available.

DURATION

Each market test lasted one month.

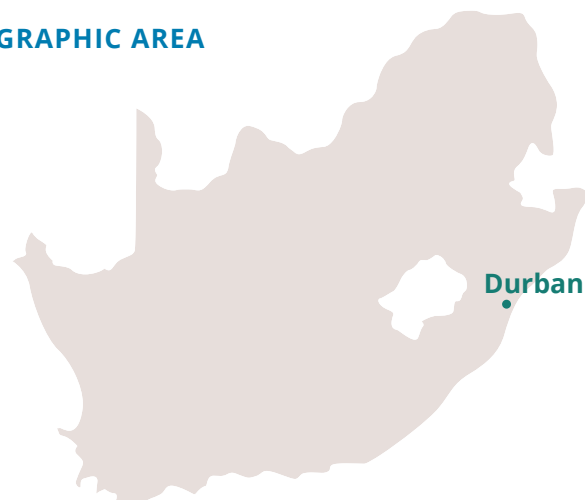
PARTNER

MatCH Research

MatCH Research was established in 2013 as a Division of the Wits Health Consortium Pty Ltd in the Department of Obstetrics and Gynaecology in the Faculty of Health Sciences at the University of the Witwatersrand. MatCH Research is based in Durban and was formerly the Durban office of the RHRU (Reproductive Health and HIV Research Unit), now WRHI (Wits Reproductive Health and HIV Institute). MatCH Research aims to answer priority questions that will translate into improving sexual and reproductive health outcomes through expanding access to appropriate and acceptable contraceptive, HIV prevention, and related health technologies and services.



GEOGRAPHIC AREA



MARKET TEST METHODOLOGY

To standardize the four market tests, MatCH Research used the following methodology for all market tests:

- An **introductory/promotional event**.
- A **prospective evaluation** of condom use among women and men who took the V Condom at the promotional event and agreed to provide feedback.
- **Focus group discussions** with women who attended the promotional event at two of the sites, and a total of four additional focus groups with women and men who participated in the prospective evaluation and used V Condom over the one-month period.
- **In-depth interviews** with coordinators at the distribution sites.
- A **product inventory** to capture the number of V Condoms distributed at each site.

“The lubrication is nice, you won’t be ashamed to buy it... you can put it in your drawer, in your purse.”

– Female student, focus group

MatCH RESEARCH MARKET TESTS

- 01 Gauging acceptability among female and male students at a tertiary educational institution**
 109 participants / 1,860 condoms distributed
- 02 Exploring attitudes and use among female and male sex workers and male employees at an NGO**
 63 participants / 1245 condoms distributed
- 03 Exploring use among factory workers through a corporate health-wellness program distribution point**
 23 participants / 540 condoms distributed
- 04 Distribution to young people through a sexual and reproductive health NGO**
 2 participants / 80 condoms distributed

“ I...highly prefer it, I also like its design and shape, and the packaging is charming. I doubt there is anyone who wouldn't want to try it because it is so attractive.”

– Female sex worker,
focus group

“ ...this condom is strong, I took one of them and stretched it, it's strong, very strong.”

– Male student, focus group



MatCH MARKET RESEARCH TEST 01

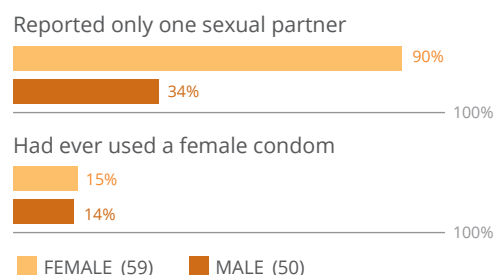
Gauging acceptability among female and male students at a tertiary educational institution

PARTICIPANT PROFILE

- 59 female students, 50 male students
- 23/21 years, mean age of females/males

V CONDOM DISTRIBUTION

- 1,860 total condoms distributed
- 140 units distributed via resupply vouchers



FINDINGS

V Condom use: motivation and frequency

Among female students, top reasons for taking V Condom were “just wanted to try one” (46%) and to “protect myself from STIs/HIV” (41%). Among males, “just wanted to try one” (50%) and “novelty of use” (33%) were the two most common reasons cited.

Methods for distribution

For distribution channels, female students preferred the shop/supermarket (56%), pharmacy (54%), government clinic/health center (49%), or the tertiary institute (36%). Male students preferred the shop or supermarket (60%) or the tertiary institute (44%) over the government clinic/health center (38%) or pharmacy (32%).

Protected sex acts

Participants in the prospective evaluation were given 10 Woman’s Condoms and asked to send a short message service (SMS) after sex and to indicate the number and type of condoms used (i.e., male condoms, female condom, V Condom) or no condom protection used.

About 42% of both female and male students returned at least one SMS message reporting on condom use. Female student reported a total of 98 sex acts: 61% of these were protected by V Condom, 30% were protected by male condom, 1% by another type of female condom, and 8% were not protected by condom use. Male students reported on 57 sex acts: 63% were protected by V Condom, 25% by male condom, 2% by another type of female condom, and 11% not protected by a condom.

Willingness to pay

Most female and male students (80% +)—both prospective and actual users—reported being willing to purchase V Condom, and all 10 students who completed the exit survey after use reported being willing to purchase V Condom in the future. Among both prospective and actual users, in an exit survey female students reported being willing to pay slightly more, at ZAR 11.3 (USD .82), for V Condom than male students at ZAR 7.9 (USD .57).*

*Exchange rate as of November 2015

80%
are willing to
purchase V Condom

Exploring attitudes and use among female/male sex workers and male employees at an NGO

PARTICIPANT PROFILE

- 56 females, 7 males
- 32/31 years, mean age of females/males
- 47% to 71% had completed secondary school, and 20% to 30% had completed tertiary level courses

V CONDOM DISTRIBUTION

- 1,245 total condoms distributed
- 350 units distributed via resupply vouchers

FINDINGS

V Condom use: motivation and frequency

Among females, the top three reasons for “taking” a V Condom were “just wanted to try one” (60%), “liked packaging” (55%), and “insertion looked easy” (55%). Among males, top three reasons were “just wanted to try one” (86%), “liked packaging” (43%), and “novelty of use” (43%).

Methods for distribution

For distribution channels, women and men both reported preferring to obtain V Condom from either this NGO (57%; 71%), the government clinic/hospital (55%; 43%), or pharmacy (27%; 29%). Men reported a higher preference than female sex workers (FSWs) for obtaining V Condom at a shop or supermarket (57%; 14%).

Protected sex acts

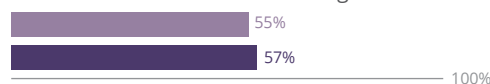
Participants in the prospective evaluation were given 10 V Condoms and asked to send an SMS after sex and to indicate the number and type of condoms used, i.e. male condoms, female condom, V Condom, or no condom protection used.

About 66% of the FSWs and 71% of the males and MSWs returned at least one SMS message reporting on condom use. FSWs reported on 328 sex acts during this assessment: 57% of sex acts were protected by a V Condom, 37% male condom, 3% protected by another type of female condom, and 3% were not protected by condom use.

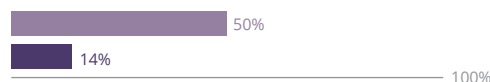
Willingness to pay

About 70% of FSWs and males and MSWs who participated in the baseline interview at the start of the market test reported being willing to purchase V Condom, and 6 of 7 women who participated in the exit survey after use also reported being willing to purchase V Condom in the future. In an exit survey, women reported being willing to pay slightly more for V Condom—at ZAR 8.30 (USD 0.60). In the initial survey, men said they would pay an average of ZAR 4.2 (USD 0.30).*

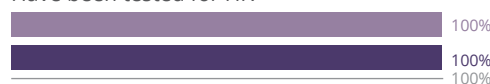
Current sexual status includes regular *and* casual partners



Used a female condom within last 3 months



Have been tested for HIV



■ FEMALE (56) ■ MALE (7)

MatCH MARKET RESEARCH TEST 03

Exploring use among factory workers through a corporate health-wellness program distribution point

PARTICIPANT PROFILE

- 4 females, 19 males
- 34 years, mean age for females and males

V CONDOM DISTRIBUTION

- 540 distributed
- 130 units distributed via resupply vouchers

FINDINGS

V Condom use: motivation

Among females, the top three reasons for taking a V Condom were “just wanted to try one” (75%), “liked packaging” (50%), and “insertion looked easy” (50%). Among males, the top three reasons were “just wanted to try one” (42%), “novelty of use” (37%), and “protect myself from STIs/HIV” (26%).

Methods for distribution

For distribution channels, female factory workers preferred to obtain V Condom at the factory (75%), the government health clinic (100%), or a pharmacy (25%). Male factory workers preferred to obtain V Condom from the government clinic/health center (68%) and shop/supermarket (63%) compared to the pharmacy (42%) or the factory (35%).

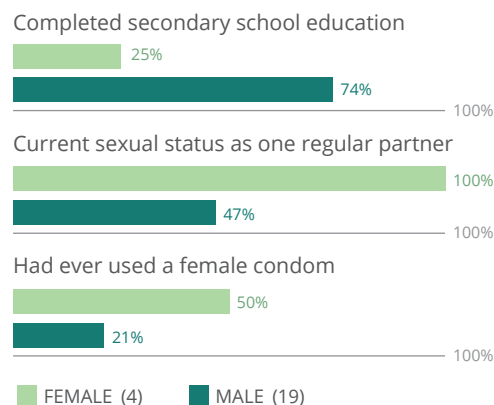
Protected sex acts

Participants in the prospective evaluation were given 10 V Condoms and asked to send an SMS after sex and to indicate the number and type of condoms used (i.e., male condoms female condom, V Condom, or no condom protection used).

All four female factory workers sent SMS messages reporting on a total of 40 sex acts over the course of the one-month V Condom acceptability study. Of these, 95% (38/40) of sex acts were protected by aV Condom, one was protected by male condom, and one was not protected by condom. Sixty-three percent of the men (12/19) returned at least one SMS message reporting on a total of 54 sex acts. Of these, 63% were protected by a V Condom and 30% by a male condom, 2% using another type of female condom; and 6% not protected by a condom.

Willingness to pay

Most female and male factory employees (75% to 100%) reported being willing to purchase the V Condom, and all 6 men who completed the exit survey after use reported being willing to purchase V Condom in the future. Female factory workers reported being willing to pay slightly more for the V Condom (ZAR17) than males were (ZAR 10 to ZAR 11).



Distribution to young people through a sexual and reproductive health NGO

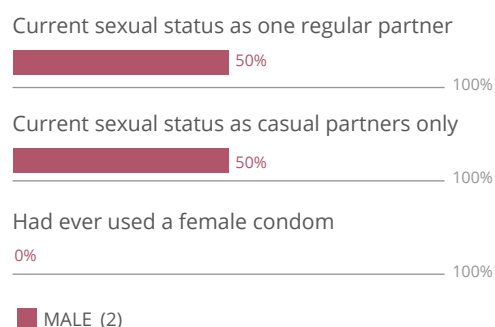
NOTE: This market test intended to reach young people attending an NGO clinic for sexual and reproductive health services. However, after several visits, MatCH Research realized that most clients were women coming for termination of pregnancy, an emotional life event when they were not thinking about anything else. After the promotional event, two male employees at the clinic expressed interest in using V Condom and limited data were collected. The research team suggested that leaving V Condoms along with an information sheet to contact MatCH Research if interested in participating, or alternately, having the clinic staff introduce V Condom, might have generated more participation than using a promotional event to recruit participants.

PARTICIPANT PROFILE

- 2 men
- 26 years old

V CONDOM DISTRIBUTION

- 80 condoms distributed; no V Condoms requested by resupply voucher



FINDINGS

V Condom use: motivation

The men cited the following reasons for picking up the V Woman's Condom: "wanted to try one" (100%), "protect myself from STIs/HIV" (50%), "insertion looked easy" (50%), and "liked the shape/design" (50%).

Methods for distribution

These participants indicated they would be willing to access V Condom from multiple potential distribution channels: this site, a government clinic or health center, a pharmacy, or a shop/supermarket.

Protected sex acts

Neither participant submitted SMS messages reporting on use of the condoms. Data on acceptability during and after use were not collected for this study.

Willingness to pay

Both participants indicated they would be willing to purchase V Condom at an average cost of ZAR 8.5 (USD 0.62).*

*Exchange rate as of November 2015

Summary findings from MatCH market tests

The five market tests spanned a number of audiences and distribution points across South Africa. Though the studies examined a wide range of factors across a diverse set of demographics, key findings emerged that can help point the way forward for market development and distribution of V Condom.

PREFERENCE

Participants reported preferring V Condom over the male condoms and other female condoms, and most reported their partners wanting both V Condom and male condom available, with some preferring V Condom only.

USE

The quantitative results indicated high V Condom usage during the study period. Most of the sex acts were protected, with participants using more V Condoms than other female condoms and male condoms.

WILLINGNESS TO PAY

The quantitative findings showed that most participants were willing to pay for V Condom if it were available for purchase. The average price for a V Condom suggested by potential V Condom users was between ZAR 4.20 and ZAR 16.70; the price suggested by actual V Condom users was between ZAR 7.90 and ZAR 11.30. Details garnered from the qualitative data showed that the motivation to pay for V Condom was based on the belief that paying ensured a quality product and free products are not as safe or trusted. Some participants wondered if the price could be reduced by excluding the lubricant.

Willingness to pay: baseline survey	Percent of prospective users willing to pay		How much should V Condom cost*	
	Female	Male	Female	Male
Location				
Tertiary institutions	86%	80%	ZAR 12.1	ZAR 9.6
Sexual health NGO	70%	71%	ZAR 9.0	ZAR 4.2
Commercial factory	75%	84%	ZAR 16.7	ZAR 10.8

*ZAR 1 = USD 0.073, November 2015; participants expressed willingness to pay between ZAR 4.2 (USD 0.31) and ZAR 16.7 (USD 1.22).

POTENTIAL DISTRIBUTION CHANNELS

Female and male participants expressed differences in their preference for distribution channels. Most preferred the study site, but many were also willing to obtain through government clinic/health center, pharmacy, and shop/supermarket.

PACKAGING

Almost all of the participants felt the design and color were striking and that the packaging did not require any changes. They described the design as “nice/good,” “unique,” “attractive,” “trendy,” “classy,” and “stylish.” Some also wanted the package to be smaller so it could be carried more discreetly.

PRODUCT FEATURES/CHARACTERISTICS

Most evaluation participants reported that V Condom material felt comfortable and enhanced their sexual pleasure. More practiced female condom users felt the outer ring was an improvement on the current FC2 as it was softer and flat instead of round. The majority of participants reported that the greatest advantage of V Condom was the ease of insertion.

LUBRICANT

Many participants expressed a strong preference toward the packaging of the lubricant and felt it was less embarrassing than buying lubricants currently on the market. Some also requested lubricant in different quantities (larger sachets, bottles).

IMPROVING PRODUCT INFORMATION

Participants suggested adding additional information about the safety of the capsule and a notice not to remove the capsule. They also suggested adding a telephone number or social media contact where they can ask questions and get more information.

“ I’m in control now,
I don’t have to wait for him...”

– Female student, focus group



Advocacy in South Africa: reinvigorating the female condom movement

Confronting a unique and challenging advocacy environment for female condoms

In South Africa, the POW PDP faced a unique set of awareness and policy challenges. Unlike many other countries, including China, South Africa supports one of the largest public-sector female condom programs in the world. The country has approved a number of national policies and strategies that call for increased availability of female condoms. These include the 2012 National Contraception and Fertility Planning Policy and Service Delivery Guidelines, which recognized the critical role of female condoms for contraception and dual protection, and the 2012–2016 National Strategic Plan for HIV/STIs/TB, which set female condom procurement

targets at a record high of 25 million units in 2016/2017.

However, in spite of South Africa's leadership on female condom programming, major challenges still surround implementation of its policy and financing commitments. South Africa's supply of female condoms has remained inadequate to meet demand and has been far outpaced by support for male condoms. In 2008–2009, a few years prior to the POW PDP's advocacy efforts in the country, the government distributed 3 to 4 million female condoms, compared with more than 350 million male condoms.

Further, policies around female condoms have not always been followed by action. Female condoms have not been strongly embraced by HIV/AIDS prevention programs or family planning programs in spite of policy directives, which leaves the product without visible or vocal champions. Research also suggests that knowledge about female condoms is still limited among policymakers and providers and that myths and negatives attitudes persist.

Sparking momentum: the POW PDP's advocacy effort

Against this landscape, in 2012 the POW PDP designed its advocacy approach to help strengthen the environment for female condoms, while simultaneously preparing for the introduction of V Condom (the local brand name for the Woman's Condom) in South Africa. The POW PDP recognized that a strong market for female condoms must be characterized by government leaders who could translate policies into procurement and quality programming. However, securing that leadership would also require a change in attitudes and perceptions among influential stakeholders, including journalists, NGOs, and current and potential users.

The POW PDP began by partnering with WISH Associates and the African Gender Institute (AGI) at the University of Cape Town (UCT), two strong advocacy allies, to better understand the current

policy and advocacy landscape for female condoms. A stakeholder mapping exercise and subsequent policy analysis helped to identify potential partners, clarify the policy landscape, and elucidate attitudes of potential users. The analysis confirmed that, although South African policies generally support female condoms, challenges to awareness, availability, and access remained.

From 2013–2014, the POW PDP worked to tackle these barriers. In conjunction with partners, they designed an intensive set of activities focused on closing the awareness gap and generating excitement about female condoms, while encouraging policymakers to follow through on government commitments. The 18-month initiative focused on increasing the knowledge of female condom programming among South African government officials, improving attitudes

and perceptions among key audiences (including journalists, NGOs, and potential end-users), and cultivating and deploying a new network of “Female Condom Ambassadors” who could promote access to female condoms generally, and V Condom specifically.

Working alongside other female condom advocacy initiatives, WISH Associates and AGI/UCT (with support from the POW PDP) created an ongoing information network for hundreds of stakeholders, including policymakers, journalists, and civil society leaders. This allowed the POW PDP to share information about advocacy activities, new research on female condoms, and specific products, including V Condom. A series of policy dialogues mobilized decision-makers to make political commitments, while journalist trainings helped to equip the media to cover the female condom issue.

At the same time, youth-focused activities—including a series of digital stories and Dance4Demand—framed the issue as current and encouraged young people to advocate with decision-makers to deliver on policy commitments. Throughout the initiative, Female Condom Ambassadors kept a steady drumbeat of attention on the issue by participating in public forums, posting sex-positive messages on social media channels, and sharing their stories through articles and opinion pieces.

“ We’re raising awareness of a huge, unmet need for contraception... and also HIV [protection]. We have the technology available right now that gives women the power to save and enhance their own lives. But it’s not available.”

— Kgomotso Motsunyane, Female Condom Ambassador and journalist and television personality

Goals included increasing knowledge among policymakers, improving attitudes and perceptions, and deploying a new Female Condom Ambassador network

Over less than two years, this focused effort helped to increase awareness of the importance of female condoms for many policymakers, journalists, civil society advocates, and female condom users. Feedback from events and local ownership of advocacy initiatives demonstrated that the activities had reached target audiences and shaped perceptions.

In November 2014, local advocates applauded when the government released a three-year tender that tracked closely with the targets laid out in its National Strategic Plan on HIV/STIs/TB. While this achievement was due to several factors, including an authentic commitment by the South African government to improve the health of women, the important work of the POW PDP and other advocates to maintain pressure on policymakers demonstrated advocacy’s value in ensuring policy implementation.



Photo: PATH

SPOTLIGHT ON SOUTH AFRICA ADVOCACY ACTIVITIES

Engaging policymakers through dialogue

Two high-level policy dialogues on female condoms, held in partnership with the Democratic Nursing Organization of South Africa (DENOSA), brought together influential decision-makers from a range of sectors to discuss policy opportunities and make action pledges—including commitments by officials to advocate for female condom choice and accessibility. Following the first policy dialogue in 2013, the POW PDP and WISH Associates focused on ensuring those pledged commitments remained visible by utilizing individual “influencers” to maintain pressure.

The next year, in 2014, the POW PDP, WISH Associates, and DENOSA took stock of the stakeholders’ advocacy activities and progress during a follow-up forum. The dialogue suggested a sharpened interest and commitment to expanding access to female condoms. For example, a high-ranking National



Photo: PATH

Department of Health HIV health official gave a presentation stressing the government’s desire to work toward the 25 million procurement target in the National Strategic Plan on HIV/STIs/TB while at the same time increasing the variety and number of female condoms in South Africa. Event organizers also organized a screening of female condom digital stories; afterward, a number of attendees remarked that it was their first chance to hear real-life stories about the product, and that the stories had strengthened their commitment.



Photo: PATH

Giving a visible, positive voice to female condoms

The Female Condom Ambassador program comprised a network of civil society leaders from diverse backgrounds who shared stories and personal perspectives to increase visibility and put a “human face” on female condoms. The ambassadors were trained and deployed to integrate female condom advocacy into their ongoing work. They included doctors, media experts, and even a sexologist. The ambassadors dramatically increased the reach of the POW PDP’s initiative by actively participating in awareness-raising events like Global Female Condom Day (GFCD), posting female condom messaging to their social media channels, and penning female condom articles and opinion pieces.

Improving media coverage of female condoms

Historically, media coverage of female condoms in South Africa has been sporadic and sometimes contained myths or misinformation. In 2013, the POW PDP and WISH Associates hosted a journalist training for representatives of 10 media outlets to strengthen their knowledge of female condoms and build their capacity to produce media content on the issue. At the workshop, WISH Associates educated the reporters on the female condom policy and programmatic landscape, demonstrated a variety of female condom products, and screened videos from the “Female Condoms Are_____” film contest. The workshop included a robust discussion on what makes female condoms newsworthy, common questions and misperceptions about the method, and how to ensure unbiased coverage. The group created a set of editors’ guidelines and circulated them to media outlets and advocacy partners in advance of the 2013 GFCD.



Photo: screenshot of September 13, 2013, article from Mail & Guardian

As a result, three important media pieces spotlighting female condoms emerged on GFCD that year. The training and editors’ guidelines have continued to yield benefits and have positioned WISH Associates as leading spokespeople for the issue of female condoms in South Africa. In 2014, the group was consulted for more than 10 media stories on female condoms.



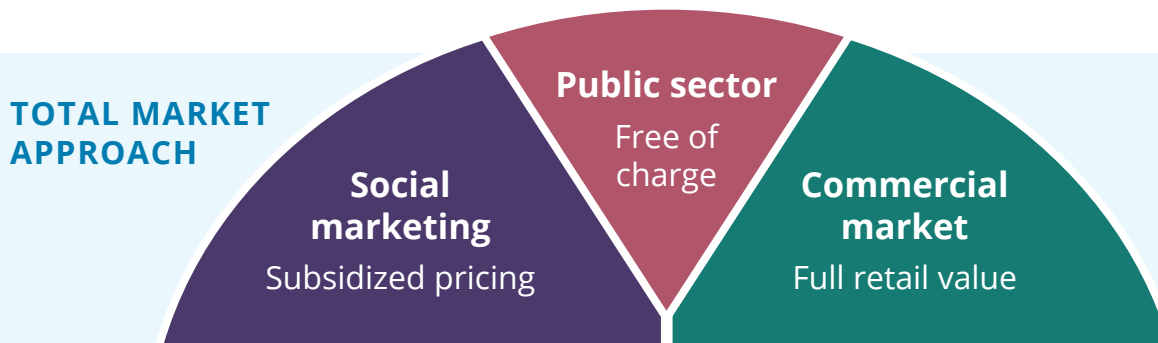
Female condom supporters show off their Dance4Demand routine to hundreds of shoppers at the Rosebank Mall in Johannesburg. Photo: PATH

Bringing young people to the female condom conversation

Market research identified young people as a key audience for V Condom introduction, so the POW PDP and WISH Associates reached out to university and college institutions with presentations and information about the product. GFCD proved to be a key advocacy platform for engaging young people. In 2013, WISH Associates and UCT/AGI hosted a well-attended GFCD film screening and discussion with university students, which was emceed by a Female Condom Ambassador. The next year, students from seven universities in three provinces in South Africa hosted Dance4Demand dance competitions as part of the GFCD activities.

The systematic engagement with youth from college and university campuses across South Africa eventually led to a student-led initiative to petition the South African government to request expanded access to female condoms on university/college campuses.

Reflections on commercial market development for V Condom in South Africa



In South Africa, male condoms are widely entrenched and readily available across all three market sectors: public sector with free distribution, social marketing at a subsidized price, and commercial at full retail value. However, male condoms have benefited from decades of investment by international development agencies, national governments, NGOs, and private companies to mainstream the product category in response to the HIV/AIDS crisis. This has allowed companies and programmers to develop a total market approach where male condoms are widely available to all consumer segments.

In contrast, most awareness and promotion activities for female condoms until now have focused on reaching lower-income women who access the product free of charge or at highly subsidized rates. An over-reliance on public sector free distribution of female condoms is a deterrent to building a sustainable market. Consequently, the commercial female condom market in South Africa, and sub-Saharan Africa, is in its infancy and will require additional resources and time to develop.

Women and men in South Africa show strong interest in V Condom in terms of acceptability. Some consumers also express willingness to pay for V Condom at prices ranging from ZAR 14 to ZAR 18 per unit. The current price of ZAR 14 for one “landed unit” in South Africa (2015) may be too expensive to

build a viable commercial market without subsidy, since substantial additional costs are incurred to support listing and selling products. The volatility and devaluation of the South African rand since 2012 has tightened the demands of the commercial market. To build toward a more sustainable market, resources must focus on raising awareness and building demand among middle- and upper-income consumers and developing communications and marketing addressed to men, since men purchase most condoms in South Africa.

Experience from South Africa confirms that moving products like male and female condoms from subsidized social marketing to the commercial sector can entail price increases ranging from 50% to 115% to cover the associated costs of entering this new sector. Decades of experience social marketing male condoms has generated a system where stores, shops, and other outlets that sell condoms to consumers expect and demand high margins to handle these products. These margins and fees add to the landed cost of the product. Thus a purely commercial market for V Condom is not economically viable in South Africa without either a well-resourced partner to subsidize these additional expenses or additional donor subsidies. Companies that are primarily manufacturers (like Dahua) or importer/distributors (like rrtMedcon) may not have the resources required to also finance introduction and market development without additional support.

Moving forward in sub-Saharan Africa

Building markets for new and underutilized technologies, such as the Woman's Condom, is a long-term endeavor. This report presents the POW PDP work in South Africa to plan and prepare for market introduction of V Condom. Market research and market test results confirmed the potential for V Condom to reach into the commercial sector. Results from the market tests demonstrated that university students were particularly enthusiastic about V Condom and show great promise as future consumers.

Due to supply chain issues and external market forces, only the first step toward market introduction was achieved during the course of the POW PDP's work in South Africa. The final step would be to launch V Condom in South Africa to middle- and upper-income consumers (young professionals) and current university students, thereby offering them the opportunity to pay for a sophisticated and up-market female condom product that meets their emotional and functional needs.

In anticipation of introduction, rrtMedcon and PATH explored several strategies for introducing the V Condom, such as health and wellness programs through corporate businesses and the mining sector, door-to-door sales such as is done with cosmetics and household goods, and on-line distribution. The corporate wellness programs

were interested in including female condoms in their health outreach programs although they opted for a less expensive female condom option. No door-to-door sales group was identified that was interested in including the Woman's Condom in their market. On-line sales were not deemed appropriate at this time since the product is not well-known among consumers who shop on-line.

At the Global Female Condom Conference held in Durban, South Africa, December 1–3, 2015, some regional and country-level distribution partners expressed interest about registering and distributing V Condom in their markets. As a result of the learnings from the South Africa market test experience, they are interested in V Condom's potential to engage new market segments due to its excellent acceptability and performance.

Until it receives World Health Organization (WHO) Prequalification, V Condom will not be eligible to participate in the public-sector tender in South Africa or several other countries in the region. Given the current price point of the product, it is unlikely that large public-sector tenders could serve as the primary basis for V Condom sales. However, a public-sector opportunity may exist if stakeholders are interested in the high consumer acceptability of V Condom and its potential for consistent and correct use over time.

AWARENESS

Currently low and limited interaction with the female condom

EARLY ADOPTERS

Typically more responsible, upmarket/higher class women of all ages

DELIVERY CHANNELS

Tertiary institutions, factories, pharmacies, government facilities, shops/supermarkets, entertainment places, schools, and truck stops

INTRODUCTION STRATEGY

Build strong base with university students; extend into young professional population

Read the related reports



Developing sustainable markets for the Woman's Condom

[➔ http://www.path.org/publications/detail.php?i=2564](http://www.path.org/publications/detail.php?i=2564)



Introducing O'Lavie Woman's Condom to China: Expanding dual protection options

[➔ http://www.path.org/publications/detail.php?i=2565](http://www.path.org/publications/detail.php?i=2565)



Using innovative female condom advocacy to improve awareness and catalyze change

[➔ http://www.path.org/publications/detail.php?i=2563](http://www.path.org/publications/detail.php?i=2563)

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