

VIETNAM | Strengthening the Total Condom Market

This report summarizes the results and lessons learned from the USAID Social Marketing for HIV Prevention Project's (USAID Social Marketing Project) efforts to strengthen Vietnam's total condom market by:

- ▶ Increasing commercial sector contributions;
- ▶ Reducing the distribution of fully-subsidized ("free") condoms without jeopardizing access among most-at-risk-populations (MARP) with the lowest willingness to pay;
- ▶ Filling supply chain gaps and driving behavior change among MARP through social marketing.

The USAID Social Marketing Project is implemented from 2008-2013 by PSI/Vietnam in collaboration with the Ministry of Health, commercial partners and civil society organizations.



Condom-holding key chains make it easier for hotel/guesthouse operators to routinely provide condoms to every customer. "Nhớ Lại Mỗi Lần" (Remember Me Every Time) is the slogan for the Ministry of Health's 100% CUP program.

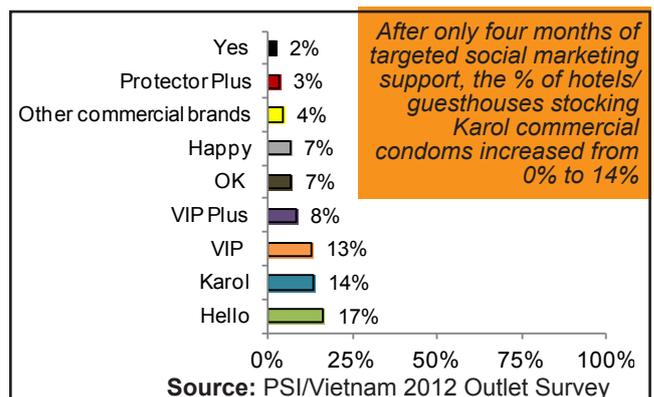
RESULTS

The Total Market Approach (TMA) aims to make markets work for poor and vulnerable consumers by increasing coverage of those in need while simultaneously improving overall market equity and efficiency. Over the longer term, TMA aims to reduce the subsidy required to ensure convenient access to and consistent use of essential health products and/or services. TMA involves improving the allocation of subsidy to ensure free product distribution targets the poorest consumers at risk, partially subsidized products target at-risk consumers with willingness to pay subsidized prices, and commercial products target those with the greatest ability to pay. By targeting subsidized market inputs, TMA increases opportunities for commercial contributions to total market growth.

Based on Vietnam condom market data and global best practices in TMA social marketing, the USAID Social Marketing Project developed specific TMA objectives and measurable targets designed to improve the efficiency of public resource allocation for condom programming in Vietnam without jeopardizing access for MARP. In Vietnam there are more than 300 commercial brands available in the pharmaceutical distribution channel. As a result, the USAID Social Marketing Project only distributes condoms to non-traditional outlets where commercial sex occurs. Since 2007, condom availability at these non-traditional outlets has almost tripled from 34% to 88%. Since 2010, due to focused distribution by the USAID Social Marketing Project, percentage of hotels/guesthouses stocking two or more brands increased from 21% to 29%.

▶ Increasing Commercial Sector Contributions

Through an innovative partnership with a Vietnamese condom distributor and one of their condom brands, Karol, the USAID Social Marketing Project significantly increased commercial condom availability at hotels/guesthouses from 13% to 18%. Beginning in March 2012, the USAID Social Marketing Project integrated distribution and marketing support for Karol into the Project's established channels accessible to MARP. To date the USAID Social Marketing Project has successfully secured cost share contributions valued at approximately U.S. \$25,000 from commercial partners to support condom promotion campaigns.



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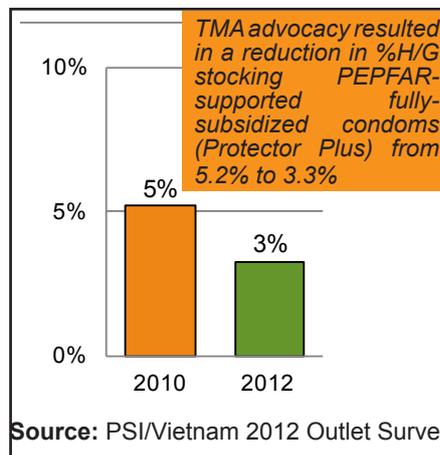
▶ Reducing Distribution of Fully-Subsidized Condoms

As a result of the USAID Social Marketing Project's advocacy efforts, Provincial AIDS Committees (PACs) in key PEPFAR provinces agreed to target free condom distribution to MARP with the lowest willingness to pay. PACs chaired "Condom Coordination Meetings" with all partners involved in condom distribution and developed written guidelines for all partners, clearly outlining which target groups and outlet types should continue to receive free condoms. As a result, estimated provincial needs for fully-subsidized Protector Plus PEPFAR supported condoms fell from 3.3 million in 2011 to 900,000 in 2012.

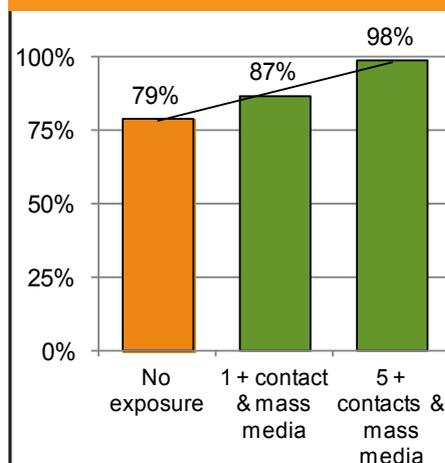
▶ Filling Market Gaps & Driving Behavior Change

Convenient access to quality, affordable condoms at outlets where commercial sex takes place is a factor correlated with consistent condom use among male clients of sex workers. As a result, the USAID Social Marketing Project supplies partially-subsidized *Number One* brand and commercial Karol brand condoms to a network of close to 5,000 non-traditional outlets accessible to MARP. However, even in cases where hotels/guesthouses stock condoms, access may be limited as operators do not routinely offer condoms to every customer. In 2012, the USAID Social Marketing Project designed and implemented a condom-holding key chain linked to the national 100% Condom Use Program (100% CUP) logo to motivate routine condom provision to every customer.

Multiple data points highlight behavioral results achieved by the USAID Social Marketing Project over the past four years. For example, male clients exposed to the USAID Social Marketing Project's behavior change communications campaigns through multiple channels were significantly more likely to use condoms consistently with female sex workers compared to male clients who were not exposed. In 2012, the USAID Social Marketing Project developed two new campaigns to address non-supply side barriers to consistent condom use and grow the total condom market: "Nho Toi Moi Lan" (Remember Me Every Time) and "Yes! Condom." Both campaigns utilize a variety of targeted channels accessible to MARP including outdoor billboards in high-risk areas, online media and interpersonal communications tools used by outreach workers reaching MARP.



Male clients exposed to social marketing communications through mass media and multiple interpersonal contacts are more likely to report consistent condom use



◀ *"Yes! Condom" campaign billboards on bus shelters promote condom purchasing and carrying behaviors. The Campaign transforms condoms from a stigmatized health product to a positive symbol of a modern lifestyle among male clients of sex workers.*

PRIORTIES FOR 2013 AND BEYOND

In order to further reduce the subsidy required to fill market gaps and motivate increased consistent condom use among MARP, the USAID Social Marketing Project will:

- ▶ Increase sales/distribution and promotion in Karol and other commercial condom brands
- ▶ Increase prices of social marketing HIV prevention products, without jeopardizing MARP affordability
- ▶ Modify sales/distribution structure for greater efficiencies
- ▶ Increase in-kind and financial contributions from commercial partners
- ▶ Sustain advocacy across partners and projects to improve targeting of fully-subsidized HIV prevention products