



**Tanzania (2008) – Market penetration of condoms study.
Third Round**

**M e a s u r i n g A c c e s s a n d
A v a i l a b i l i t y o f c o n d o m s
i n h i g h - r i s k a r e a s i n
T a n z a n i a**

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I. EXECUTIVE SUMMARY

Background and Research Objectives: MAP (Measuring Access and Performance) is a methodology that allows programmers to make an assessment of product availability and accessibility using pre-defined criteria for coverage, quality of coverage and access. Apart from coverage and quality of coverage, it has a market penetration and access measure in high risk places, which is meant to assess the availability of condoms in risk places.

This is the third round of high risk condom market penetration. This report will not present comparisons for 2006, but rather a comparison is made between 2007 and 2008 which has equivalent sample sizes meaningful to compare. Therefore the third round of market penetration study had the following objectives: (1) monitor the availability of each of PSI/Tanzania’s social marketed condoms (*Salama, Salama Studs, Salama 3 Bomba and Familia*), as well as of other non PSI condoms in high risk areas, (2) compare market penetration and access to condoms between the baseline and follow up, and (3) monitor market penetration of *Salama, Salama Studs* and *Salama 3 Bomba* condoms in high-risk areas (hotzones) and a measure of access to these products among high-risk groups.

Description of Intervention: PSI/Tanzania is engaged in the social marketing of a range of health products that directly address one of the most significant health concerns faced by Tanzanians – HIV/AIDS. These products are *Salama, Salama Studs, Salama 3 Bomba, Familia, and Care Female condoms*, these products are distributed via a variety of outlets, primarily employing Tanzania’s commercial distribution network. Community distribution mechanisms and institutional/NGO distribution account for a smaller proportion of sales. Table: 1 below presents a summary of PSI/Tanzania condom market portfolio.

Table: 1 PSI/Tanzania condom market Portfolio

Brand	Presentation	Consumer Price per unit	Comments
<i>Salama Regular</i>	Three Pack costing 100 Tsh	33.3 Tsh	Flagship brand, launched 1993, targeted at youth aged 15-24
<i>Salama Studded</i>	Three Pack costing 200 Tsh, studded texture	66.6 Tsh	Premium brand variant launched 2006, targets older men, urban areas
<i>Salama 3 Bomba</i>	Three Pack costing 200 Tsh, scented condoms	66.6 Tsh	Premium brand variant launched 2007, targets youth in urban areas
<i>Familia</i>	Ten Pack costing 500 Tsh, scented	50Tsh	Family planning brand launched 2008, targeting couples and those in long term relationships

Methodology: For condoms, a market penetration indicator has been employed in additional specific locations: i.e. the proportion of high-risk meeting places (hotspots) in a high-risk area (hot zone), in which the condoms are sold, and meet minimum standards. A total of 189 hotzones were visited during the 2008 study and a total of 930 hotspots were audited nation-wide. These hot zones were identified in conjunction with sales and marketing personnel as well as the regional and zonal managers. For a sample list of Hotspot and Hotzones, please see Annex 3. A Personal Digital Assistant (PDA) was used to collect data.

Main Findings: *Salama* condoms have the highest market penetration of any type of condoms, available in 65% of high risk outlets nationwide. This is an increase of two percent from the baseline (2007) where market penetration of *Salama* was reported at 63%. Of the three extensions of *Salama* condoms, *Salama Regular* has reported a higher market penetration compared to other non PSI/Tanzania condoms. There is a high degree of unmet demand for PSI/Tanzania products from outlets that have never stocked them.

Programmatic Recommendations

- Focus efforts on increasing the distribution of products to outlets in high risk places. Constant supply will help address the problem of stock out that is reported in high risk areas.
- Efforts are required to increase the distribution of promotional materials to outlets in high risk areas
- Identifying and supplying these outlets in high risk outlets should be accorded programmatic priority if greater market penetration is to be achieved.
- A strategic effort which may include re-positioning of *Salama Studs* is needed in order to provide more options for *Salama* users in high risk places. Targeting high risk areas with *Salama Studs* is highly recommended.
- Special efforts are required to improve condom market penetration in the hotspots of coastal zone where market penetration has dropped significantly.

II. FINDINGS

ACCESS AND MARKET PENETRATION

Hotspots, Hotzones, Access and Penetration Simply Defined

Hotspot: A hotspot is any meeting place where people at high risk of HIV (CSWs and their clients) congregate, or high risk activity (transactional, cross-generational, or multi-partner sex) takes place. A hotspot can be a bar, nightclub, or guest house.

Hotzone: A hotzone is a closely clustered group of hotspots (hotspots within easy walking distance from one another). A hotzone is typically an urban neighborhood or street with many bars, nightclubs, 'groceries' and/or guest houses.

Access: is the proportion of a target population that is within the catchment area of a product or service delivery point. The catchment area is based on a geographic or time distance and depends on the product or service. For example, a radius of 100 meters around condom outlets in hotzones. People who live, work, meet, and/or entertain within the catchment area of a delivery point are said to have easy access to the product or service. In this survey, access refers to the clients of the 'hotspots' who are potentially likely to engage in risky sex (e.g. bar goers, guesthouse customers, commercial sex workers and any others present on the day of the survey), and whether they can access a condom with 100 meters of where they are seated, between the hours of 6pm and midnight, on the day of the survey.

Penetration: is the proportion of outlets in which a product or service is available: out of all potential outlets for a given product or service, it is the percentage of outlets that actually sell the product or provide the service. In this survey, it refers to the proportion of bars, guesthouses, kiosks and other relevant outlets that are found in hotzones, are open between 6pm and 12pm, and are actually found to be selling condoms on the day of the survey.

ACCESS

Access and market penetration in high risk areas for this study is meant to assess the extent to which PSI/Tanzania's condom social marketing interventions have resulted in improved availability since the 2007 survey. The table below therefore compares access and market penetration performance during the past two years, 2007 and 2008 as the follow up.

Findings from this study indicate relatively higher access of condoms in high risk areas in most locations/zones. In all zones access was reported at 69% during the 2007 survey, a level which has increased to 74% during the current round. The highest access level was found in the Northern zone at 89%, while Dar zone has the lowest access level (55%) compared to the rest of the zones. On average 64% of the total hotspots visited (N=930), had commercial sex workers available during the survey, with an average of 7 commercial sex workers per hotspot, and an average of 22 people per hotspot. It has to be noted however that this is an estimate from the managers/owners of hotspots.

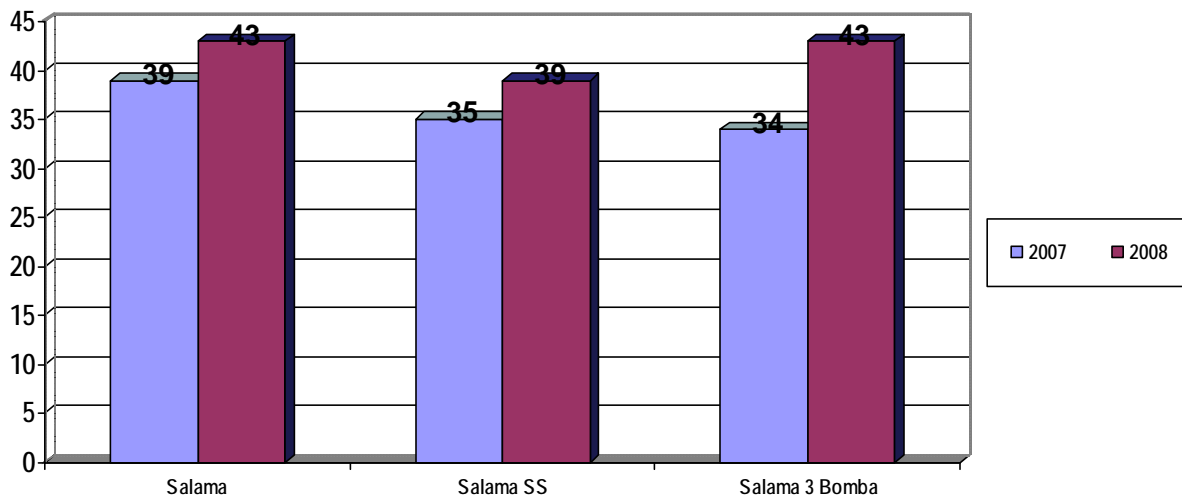
Table: 2 Access of Condoms among clients of high risk outlets

ZONE NAME	ACCESS 2007	ACCESS 2008
Lake Zone	49%	54%
Dar Zone	65%	55%
Central Zone	85%	80%
Southern Zone	68%	70%
Northern Zone	87%	89%
National Access	69%	74%

MARKET PENETRATION

Nationally, market penetration for *Salama regular* in hotzones has increased from 39% in (2007) to 43% during the follow up (2008). Market penetration for *Salama Studs* in high risk areas has also increased from 35% to 39% during follow up. *Salama 3 Bomba* penetration in high risk areas is also of the increase from 34% to 43%. *Dume* and other condoms appeared to have remained the same from the baseline at 24% for *Dume* during both baseline and follow up, while other non PSI/Tanzania condoms have slightly decreased to 22% from 24% during the baseline. Generally when all the *Salama* extensions are combined (*any Salama*) market penetration in high risk areas of Tanzania increases from 63% during baseline to 65% during follow up.

Figure 1: National market penetration for PSI/Tanzania condoms.



Similar comparison is made between the baseline and follow up for PSI/Tanzania social marketed condoms vs. other condoms. Findings from this study indicate that across zones, PSI/Tanzania condoms are widely available as compared to non PSI/Tanzania condoms. The penetration rate for *any Salama* condom has slightly increased during the follow up, from 63% in (2007) to 65% in (2008). Any condoms availability has also slightly increased from 76% in (2007) to 77% during follow up.

Figure 2: Comparison in market penetration between PSI/Tanzania, non PSI/Tanzania and any condoms.

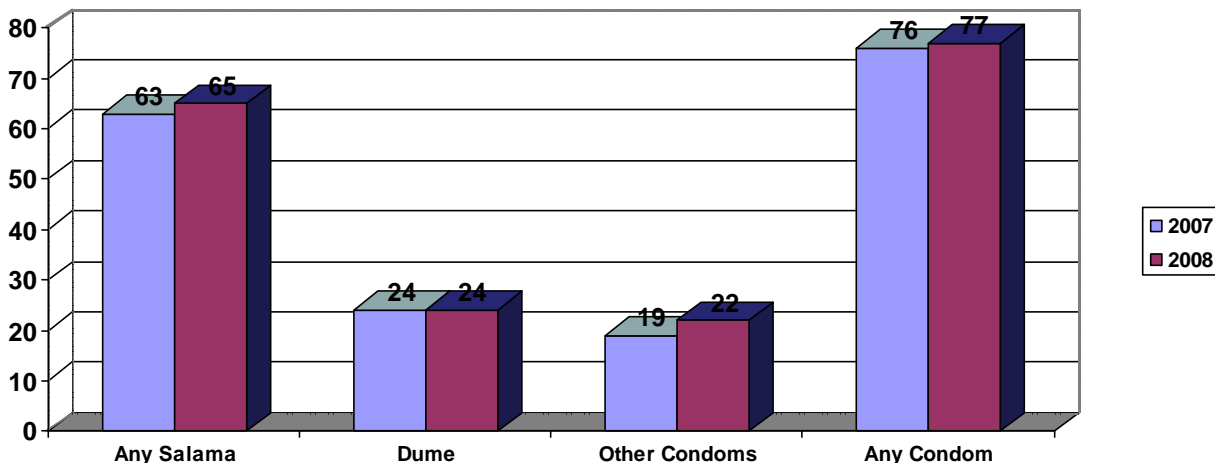


Figure 3a below, penetration differs widely across zones: for *Salama Regular* it varies between 53% at its highest (Nothern zone), to 19% at its lowest (Dar zone). Market penetration in high risk areas for *Salama Regular* has increased in most of the zones with the exception of Dar zone which has recorded a decrease in penetration for *Salama Regular* in high risk areas.

Figure: 3a Market penetration for *Salama Regular*

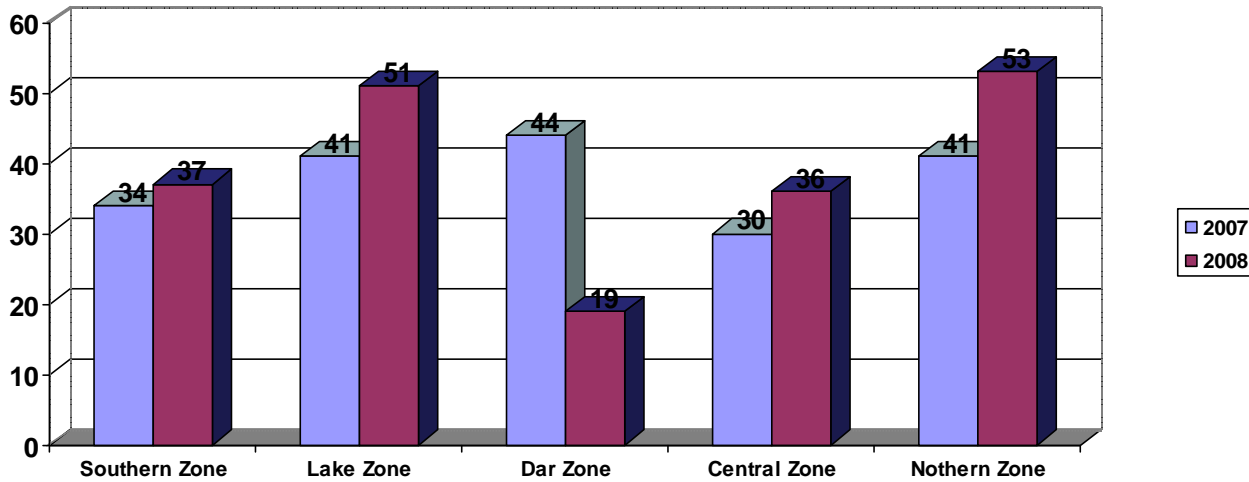


Figure 3b For *Salama Studs* penetration varies between 56% at its highest (Northern zone), to 13% at its lowest (Dar zone). A general increase in market penetration is noted in most of the zones except Dar and Southern zone which have recorded a decrease in market penetration.

Figure: 3b Market penetration for *Salama Studs*

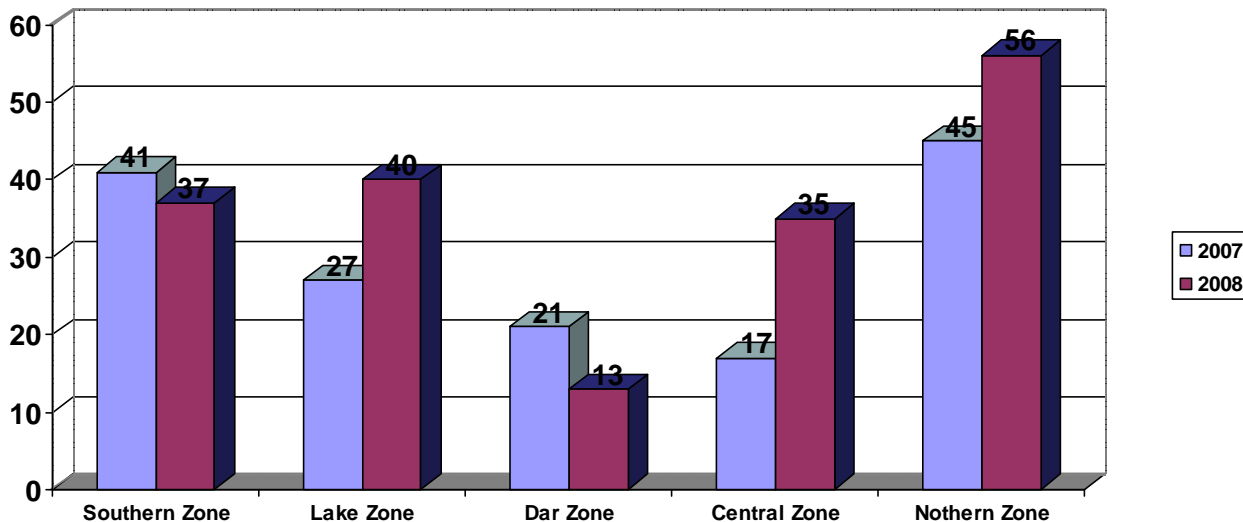


Figure 3c Market penetration for *Salama 3 Bomba* is reported higher in Northern zone (63%) and low at 17% in Dar zone. Unlike the other extensions of *Salama* (*Regular* and *Studs*) that have recorded an increase since baseline, this brand has generally recorded a decrease in some zones, particularly in Southern zone, Dar zone and Central zone. An increase in market penetration is only recorded only in two zones, Northern and Lake Zone.

Figure: 3c Market penetration for *Salama 3 Bomba*

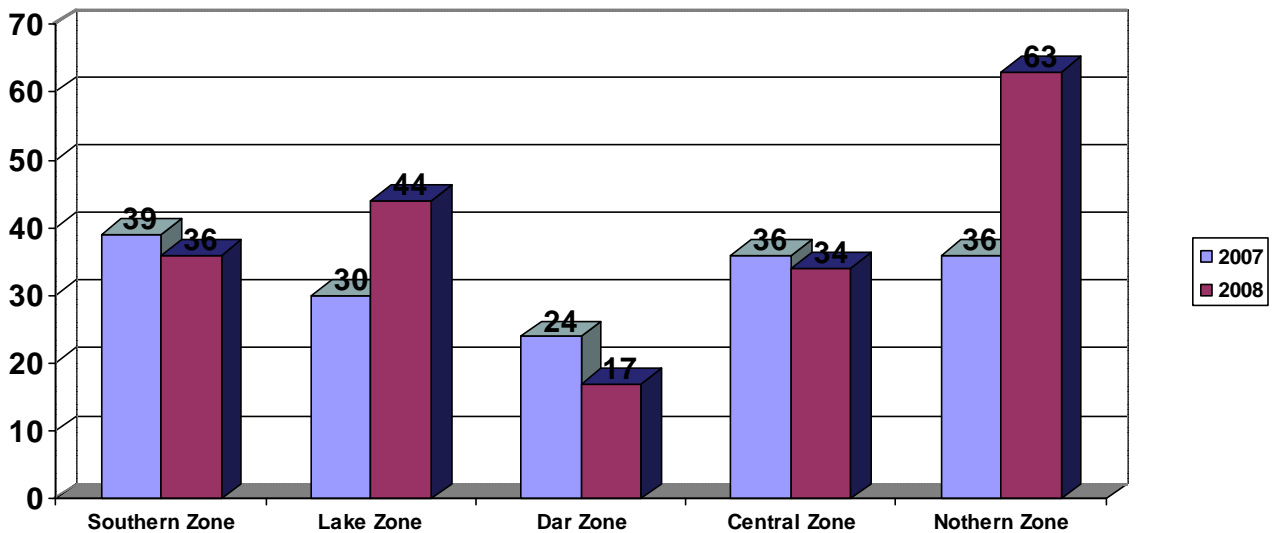


Figure 3d *Familia* condoms (nationally) are reported higher at 28% in Northern zone and lower at 4% in Dar zone. The brand has no baseline as it was launched after the baseline survey was conducted. This is targeted for couples/cohabiting partners, however it not positioned to be found in high risk places – but as indicated in the figure below it is found in some outlets of the high risk places.

Figure: 3d Market penetration for *Familia* condoms

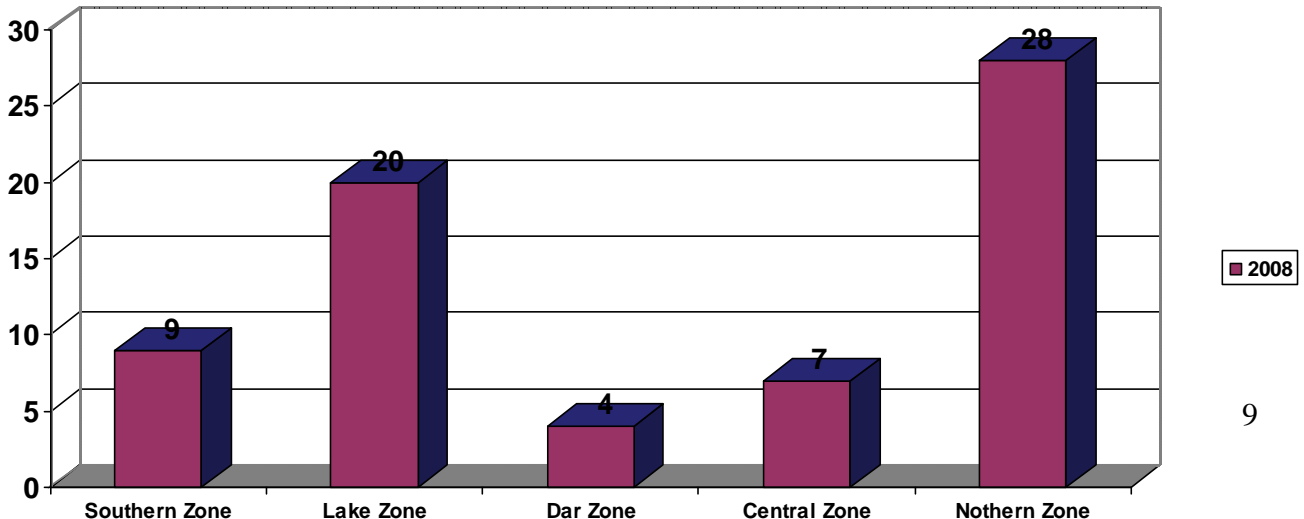


Table: 3 Duration it takes to sell 1 dispenser

Duration one dispenser last	<i>Salama Regular</i>	<i>Salama Studs</i>	<i>Salama 3Bomba</i>	<i>Familia condom</i>	<i>Dume condom</i>	<i>Care female condom</i>	<i>Lady Pepeta condom</i>
Less than one week	31%	35%	30%	19%	20%	27%	0%
1-4 weeks	47%	50%	54%	58%	52%	54%	22%
More than 4 weeks	22%	14%	16%	23%	28%	19%	78%

Findings from this study, table 3 above indicates that required levels of replenishments differ per product. With most of the products reporting to last between one and four weeks. It is important to note that PSI/Tanzania social marketed condoms and that of other partners such as *Dume* follows the same pattern in terms of duration a single dispenser last.

The two female condoms (*Care* and *Lady Pepeta*) presents a slightly different pattern on the duration it takes to sell one dispenser, while mostly it takes one to four weeks to sell one dispenser of *Care* female condoms, for *Lady Pepeta* it mostly takes more than four weeks to sell one dispenser of *Lady Pepeta* condoms.

Market Penetration Indicators

Table 4: Sample Sizes for Condom Penetration in High-Risk Outlets.

Southern		Coastal		Central		Lake		Northern		National	
Baseline (N=227)	Follow up (N=196)	Baseline (N=108)	Follow up (N=175)	Baseline (N=153)	Follow up (N=160)	Baseline (N=155)	Follow up (N=198)	Baseline (N=247)	Follow up (N=201)	Baseline (N=790)	Follow up (N=930)

Table 4a: Market Penetration Indicators for *Salama Regular*

<i>Salama Regular</i>	SOUTHERN		DAR		CENTRAL		LAKE		NORTHERN		NATIONAL	
	Baseline	Follow-up	Baseline	Follow-up	Baseline	Follow-up	Baseline	Follow-up	Baseline	Follow-up	Baseline	Follow-up
Penetration												
Available at time of survey	34%	37%	44%	19%	30%	36%	41%	51%	41%	53%	39%	43%
Frequency of stock-outs , among outlets selling the product, % which had experienced stock out in last 4 weeks	45%	51%	85%	3%	59%	19%	79%	19%	79%	70%	71%	43%
Presently stocked out, but normally available	34%	29%	55%	26%	35%	43%	34%	35%	40%	87%	39%	46%
Other Indicators												
Available and Clearly Visible	82%	92%	63%	94%	53%	70%	84%	91%	79%	78%	77%	84%
Available and Not Expired	100%	100%	100%	100%	100%	100%	100%	100%	99%	100%	99%	100%
Normally Available and Correct Price	72%	84%	40%	61%	75%	83%	71%	54%	97%	88%	76%	75%
Promotional Material Visible	28%	27%	14%	4%	9%	13%	10%	29%	19%	31%	19%	24%
PSI	-	2%	-	0%	-	0%	-	4%	-	1%	-	2%
Source of Supply: PSI sales agent	0%	6%	2%	0%	0%	17%	0%	9%	0%	1%	0%	17%
Wholesaler	59%	90%	73%	89%	100%	70%	86%	5%	80%	31%	76%	58%
Retailer	-	1%	-	11%	-	8%	-	19%	-	37%	-	20%
Nufaika	32%	0%	17%	0%	0%	4%	13%	5%	8%	0%	16%	2%
Don't know	-	0%	-	0%	-	0%	-	4%	-	0%	-	2%
Want to stock product (if never available)	85%	74%	41%	13%	75%	78%	76%	92%	87%	86%	79%	70%

Table 4b: Market Penetration Indicators for *Salama Studs*

<i>Salama Studs</i>	SOUTHERN		DAR		CENTRAL		LAKE		NORTHERN		NATIONAL	
	Baseline	Follow-up	Baseline	Follow-up	Baseline	Follow-up	Baseline	Follow-up	Baseline	Follow-up	Baseline	Follow-up
Penetration												
Available at time of survey	41%	37%	21%	13%	17%	35%	27%	40%	45%	56%	35%	39%
Frequency of stock-outs , among outlets selling the product, % which had experienced stock out in last 4 weeks	52%	38%	96%	17%	11%	15%	73%	22%	60%	64%	61%	41%
Presently stocked out, but normally available	22%	28%	37%	28%	25%	34%	38%	33%	42%	87%	33%	42%
Other Indicators												
Available and Clearly Visible	90%	93%	91%	100%	56%	69%	88%	88%	87%	73%	87%	81%
Available and Not Expired	100%	100%	100%	100%	100%	100%	100%	100%	99%	100%	99%	100%
Normally Available and Correct Price	93%	87%	70%	50%	67%	89%	81%	70%	98%	83%	90%	80%
Promotional Material Visible	27%	16%	7%	2%	6%	3%	12%	19%	22%	28%	18%	17%
PSI	-	3%	-	0%	-	0%	-	6%	-	1%	-	3%
Source of Supply: PSI sales agent	1%	9%	4%	8%	0%	22%	0%	14%	1%	36%	1%	22%
Wholesaler	68%	84%	70%	67%	100%	56%	81%	55%	79%	28%	76%	51%
Retailer	-	3%	-	25%	-	15%	-	18%	-	32%	-	20%
Nufaika	22%	0%	22%	0%	0%	7%	14%	4%	6%	1%	14%	2%
Don't know	-	0%	-	0%	-	0%	-	3%	-	1%	-	1%
Want to stock product (if never available)	85%	83%	54%	23%	64%	92%	78%	97%	76%	84%	75%	78%

Table 4c: Market Penetration Indicators for *Salama 3 Bomba*

<i>Salama 3 Bomba</i>	SOUTHERN		DAR		CENTRAL		LAKE		NORTHERN		NATIONAL	
	Baseline	Follow-up	Baseline	Follow-up	Baseline	Follow-up	Baseline	Follow-up	Baseline	Follow-up	Baseline	Follow-up
Penetration												
Available at time of survey	39%	36%	24%	17%	36%	34%	30%	44%	36%	63%	34%	43%
Frequency of stock-outs , among outlets selling the product, % which had experienced stock out in last 4 weeks	48%	54%	96%	44%	21%	7%	81%	15%	57%	59%	59%	49%
Presently stocked out, but normally available	28%	36%	35%	24%	31%	39%	30%	33%	48%	87%	36%	43%
Other indicators												
Available and Clearly Visible	94%	92%	81%	100%	84%	75%	94%	92%	91%	83%	91%	86%
Available and Not Expired	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Normally Available and Correct Price	98%	91%	73%	63%	84%	95%	66%	63%	99%	79%	89%	79%
Promotional Material Visible	18%	28%	15%	7%	4%	8%	12%	38%	20%	36%	16%	28%
PSI	-	3%	-	0%	-	0%	-	5%	-	1%	-	2%
Source of Supply: PSI sales agent	0%	7%	8%	0%	0%	27%	0%	12%	0%	33%	1%	21%
Wholesaler	59%	88%	77%	37%	100%	56%	87%	59%	88%	34%	78%	54%
Retailer	-	3%	-	63%	-	11%	-	14%	-	28%	-	18%
Nufaika	32%	0%	12%	0%	0%	4%	6%	4%	4%	1%	14%	2%
Don't know	-	0%	-	0%	-	0%	-	6%	-	3%	-	3%
Want to stock product (if never available)	85%	85%	55%	27%	71%	90%	83%	97%	81%	80%	78%	78%

Table 4d: Market Penetration Indicators for *Dume*

<i>Dume</i>	SOUTHERN		DAR		CENTRAL		LAKE		NORTHERN		NATIONAL	
	Baseline	Follow-up	Baseline	Follow-up	Baseline	Follow-up	Baseline	Follow-up	Baseline	Follow-up	Baseline	Follow-up
Penetration												
Available at time of survey	27%	14%	23%	17%	40%	12%	18%	24%	23%	43%	24%	24%
Presently stocked out, but normally available	51%	19%	33%	24%	41%	0%	24%	26%	26%	81%	24%	48%
Other Indicators												
Available and Clearly Visible	94%	70%	76%	81%	62%	56%	82%	76%	86%	73%	84%	73%
Available and Not Expired	100%	100%	100%	100%	100%	94%	100%	100%	100%	99%	100%	99%
Promotional Material Available and Visible	n/a	13%	n/a	12%	n/a	91%	n/a	14%	n/a	27%	n/a	27%

Table 4e: Market Penetration Indicators for *Other non PSI/Tanzania Commercial brands*

<i>Other Commercial Condom Brands</i>	SOUTHERN		DAR		CENTRAL		LAKE		NORTHERN		NATIONAL	
	Baseline	Follow-up	Baseline	Follow-up	Baseline	Follow-up	Baseline	Follow-up	Baseline	Follow-up	Baseline	Follow-up
Penetration												
Available at time of survey	24%	19%	19%	10%	4%	4%	33%	26%	9%	34%	24%	22%
Presently stocked out, but normally available	11%	54%	27%	17%	6%	6%	10%	52%	13%	73%	3%	28%

Table 4f: Market Penetration Indicators for Care Female Condoms

<i>Care female condoms</i>	SOUTHERN		DAR		CENTRAL		LAKE		NORTHERN		NATIONAL	
	Baseline	Follow-up	Baseline	Follow-up	Baseline	Follow-up	Baseline	Follow-up	Baseline	Follow-up	Baseline	Follow-up
Penetration												
Available at time of survey	n/a	1%	n/a	0%	n/a	0%	n/a	2%	n/a	11%	n/a	4%
Frequency of stock-outs , among outlets selling the product, % which had experienced stock out in last 4 weeks	n/a	100%	n/a	0%	n/a	0%	n/a	50%	n/a	96%	n/a	91%
Presently stocked out, but normally available	n/a	4%	n/a	3%	n/a	2%	n/a	6%	n/a	26%	n/a	10%
Other Indicators												
Available and Clearly Visible	n/a	100%	n/a	0%	n/a	0%	n/a	50%	n/a	61%	n/a	62%
Available and Not Expired	n/a	100%	n/a	0%	n/a	0%	n/a	100%	n/a	100%	n/a	100%
Normally Available and Correct Price	n/a	100%	n/a	0%	n/a	0%	n/a	25%	n/a	100%	n/a	80%
Promotional Material Visible	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
PSI	n/a	0%	n/a	0%	n/a	0%	n/a	0%	n/a	4%	n/a	3%
Source of Supply: PSI sales agent	n/a	0%	n/a	0%	n/a	0%	n/a	0%	n/a	32%	n/a	26%
Wholesaler	n/a	100%	n/a	0%	n/a	0%	n/a	75%	n/a	46%	n/a	53%
Retailer	n/a	0%	n/a	0%	n/a	0%	n/a	25%	n/a	11%	n/a	12%
Nufaika	n/a	0%	n/a	8%	n/a	0%	n/a	0%	n/a	4%	n/a	3%
Don't know	n/a	0%	n/a	0%	n/a	0%	n/a	0%	n/a	4%	n/a	3%
Want to stock product (if never available)	n/a	45%	n/a	8%	n/a	66%	n/a	76%	n/a	51%	n/a	54%

Table 4g: Market Penetration Indicators for Lady Pepeta

<i>Lady Pepeta female condom</i>	SOUTHERN		DAR		CENTRAL		LAKE		NORTHERN		NATIONAL	
	Baseline	Follow-up	Baseline	Follow-up	Baseline	Follow-up	Baseline	Follow-up	Baseline	Follow-up	Baseline	Follow-up
Penetration												
Available at time of survey	n/a	3%	n/a	5%	n/a	2%	n/a	2%	n/a	7%	n/a	4%
Frequency of stock-outs , among outlets selling the product, % which had experienced stock out in last 4 weeks	n/a	86%	n/a	3%	n/a	68%	n/a	50%	n/a	100%	n/a	83%
Presently stocked out, but normally available	n/a	5%	n/a	6%	n/a	6%	n/a	3%	n/a	9%	n/a	6%
Other Indicators												
Available and Clearly Visible	n/a	57%	n/a	100%	n/a	67%	n/a	100%	n/a	47%	n/a	64%
Available and Not Expired	n/a	100%	n/a	100%	n/a	100%	n/a	100%	n/a	100%	n/a	100%
Normally Available and Correct Price	n/a	71%	n/a	40%	n/a	33%	n/a	50%	n/a	94%	n/a	72%
Promotional Material Visible	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
NGO	n/a	0%	n/a	0%	n/a	0%	n/a	0%	n/a	29%	n/a	14%
Source of Supply: Wholesaler	n/a	86%	n/a	20%	n/a	100%	n/a	75%	n/a	64%	n/a	67%
Retailer	n/a	14%	n/a	80%	n/a	0%	n/a	25%	n/a	6%	n/a	19%
Don't know	n/a	0%	n/a	0%	n/a	0%	n/a	0%	n/a	0%	n/a	0%
Want to stock product (if never available)	n/a	44%	n/a	7%	n/a	69%	n/a	76%	n/a	57%	n/a	56%

III. PENETRATION AND OTHER INDICATORS ANALYSIS

- Availability varies from one zone to the other and for each product type. Generally market penetration rates of PSI – marketed condoms have increased across zones, especially for *Salama Studs* which have the highest market penetration of all PSI condoms. Moreover, PSI condoms have the highest market penetration than other condom brands in high risk areas.
- The frequency of stock-outs is reported to have decreased nationally for *Salama Regular*. During the 2007 survey, the frequency of stock-outs was reported at 71%, and this has decreased to 46% during the follow-up. Similar findings are reported for the two other *Salama* condoms. Moreover, across zones all the products were reported to be within the expiry dates.
- Visibility and correct prices are generally met across all PSI/Tanzania condoms in all the zones. Findings indicate that in places where condoms are available, they are generally visible and sold at the correct recommended retail price. Comparing the baseline and the follow up, no significant changes are noted on these indicators as similar findings were reported during the baseline in 2007.
- Promotional materials are rarely found in most of the zones and across products. Though an increase is noted among products i.e. for *Salama* regular from 19% during baseline in 2007 to 24% during the follow up in 2008, the noted increase is not enough to address the availability of promotional materials for all PSI condoms.
- Sources of supply are mostly wholesalers, across products and in all the zones. The other reported sources of supply were reported to be retailers and the national distributor (Nufaika).
- Findings also indicates a greater number of “unmet needs”, greater number of high risk outlets owners expressed their willingness to stock PSI condoms.
- On average across the entire product, this study reports that one dispenser lasts between one and four weeks.

IV LIMITATIONS

- The charging of PDAs was highly affected in areas where electricity was not available. Data collectors had to travel long distance to cities in order to charge the PDAs. This slowed the accomplishment of the survey.
- It is always very important to explain and introduce PDAs to respondents so as to minimize technology fear, and it is always time-consuming to explain and introduce the device to local government officials and outlet owners as in some cases some feared that the device is not only for collecting data but it does the recording of their sales.
- Using PDAs especially in high risk areas is always a risk due to the nature of people found in study locations.
- Some of the hotspot owners, particularly in guest houses, were reluctant to let data collectors inside the rooms to confirm answers given by the owners. In such cases data collectors were to rely only on answers provided by the hotspot owners.

V. CONCLUSIONS AND PROGRAMMATIC RECOMMENDATIONS

- *Salama* condom brand has the highest market penetration compared to other PSI social marketed condoms. It also has the highest penetration compared to other condoms.
- Market penetration for any *Salama* condoms in high risk areas has increased when compared to penetration during 2007 survey.
- It is clear that stock-outs is still a common problem, though slightly decreasing as compared to 2007 and that there is a higher degree of “unmet demand” for PSI/Tanzania products from outlets that have never stocked them

Therefore we recommend: -

- Improve distribution of products to high risk areas (hotzones) where findings from the follow up study reports stock outs as a major problem in most of the locations. Constant supply of these products in high risk places is possibly going to address this problem.
- Increase distribution of promotional materials to high risk outlets (hotzones) that sell the PSI marketed products. Findings from this study reports that across zones, promotion materials for all the products were rarely found.
- Identifying and supplying these hotzones with products should be accorded programmatic priority if greater high risk places market penetrations are to be achieved.
- Special efforts are required to improve condom market penetration in the hotspots of coastal zone where market penetration has dropped significantly.



VI. ANNEXES

Annex 1: Audit Sheets

Data Collection Form – Hotzone Market Penetration & Access

	Date:								
	Time:								
	Name of auditor:								
A	Region:								
B	Hotzone Name:								
C	Hotspot Name:								
D	Type of hotspot: Bar / Night Club / Guesthouse / Kiosk / Household Other (specify)								
E	Coordinates (decimal degrees): S . / E .								
1	Estimated number of people present								
2	CSWs present (ask bartender)								
3	Estimated number of CSWs								
	Product Information	Salama	Salama Studs	Salama 3 Bomba	Familia	Care	Dume	Other Brands	Lady Pepeta
3	Product available at time of survey								
4A	If available at present, product stocked out in the past 4 weeks.								
4B	Product not available at present but usually in stock								
5	Clearly visible to customer								
6	Product is within expiry date								
7	Price to consumer								
8	Promotional material visible								
9	Source of supply: Wholesaler								
10A	Source of supply: Nufaika								
10B	Source of supply: PSI Sales Agent								
10C	Source of supply: Retailer								
10D	Source of supply: NGO								
10E	Source of supply: I don't know								
11	If product is never available, would outlet like to stock the product?								
12	Approximately how long does one dispenser last? (< 1 week; 1-4 weeks; > 4 weeks)								
13	In your opinion, which of the following condom attributes is most important in motivating your customers in their choice of condom: Low price, High quality, Scent, Features such as studs, Easy/quick availability of any product, Nothing specific								

ANNEX 2: METHODOLOGY

Sampling and Data Collection

For the hotzone penetration indicator, 180 hotzones were identified by programmatic priority, with PSI/Tanzania program managers using a subjective assessment of 'riskiness' including such factors as estimated number of commercial sex workers (CSWs), the mobility of the population, proximity to national borders, size of the settlement etc. Each hotzone was visited between 8pm and midnight to ensure that the inspections coincided with periods of high-risk activity.

Each audited outlet and each hotspot was 'marked' using a GPS unit and the geographic coordinates were recorded on paper.

Survey Instrument(s) The principle instruments of the survey were separate questionnaires for the rural coverage/quality of coverage, and hotzone assessments. The questionnaire was pre-tested intensively by the data collectors and modified slightly for the actual survey.

Analytic Technique The data was double-entered and validated using Epi Info 6 and then exported to SPSS 16 for analysis. The maps were produced using the WHO's HealthMapper software.

ANNEX 3: SAMPLE HOTZONES

Region	Hotzone	Region	Hotzone
Arusha	Limpopo	Kigoma	Website
Arusha	Stand ndogo	Kigoma	Mwanga street
Arusha	Stadium	Kigoma	Safari lodge
Arusha	Nhc	Kigoma	WebSite
Arusha	Majengo mapya	Kilimanjaro	Mission street
Arusha	Kaloleni	Kilimanjaro	Dar street
Arusha	Quotas	Kilimanjaro	Machame street
Arusha	Maghorofani	Kilimanjaro	Mission street
Arusha	Levolosi	Kilimanjaro	Kiusa street
Dar	sokota	Kilimanjaro	Dar street
Dar	Kili time	Kilimanjaro	Kiusa streert
Dar	Sterio	Kilimanjaro	Mission street
Dar	Macheni	Kilimanjaro	Machame street
Dar	Kili time	Kilimanjaro	Majengo mapya
Dar	Macheni	Kilimanjaro	Korongoni street
Dar	Keko Magurumbasi	Lindi	Ikwiriri
Dar	Macheni	Lindi	Nangurukuru
Dar	Rozana	Lindi	Nangurukuru
Dar	Keko Magurumbasi	Lindi	Somanga
Dar	Rozana	Lindi	Nangurukuru
Dar	Kilwa ruins	Lindi	Somanga
Dodoma	Chako Ni Chako	Lindi	Kilwa Ruins
Dodoma	Pandambili-Kongwa	Lindi	Nangurukuru
Dodoma	Tanzania-Uhindini	Manyara	Majengo Mapya
Dodoma	Chako Ni Chako	Manyara	Ng'ambo
Dodoma	Chako Ni Chako-2	Manyara	Uwanja wa mazoezi
Dodoma	Dodoma in	Manyara	Kota
Iringa	Mafinga Udimila	Manyara	Majengo mapya B
Iringa	Mafinga	Manyara	Umoja
Iringa	Mafinga Udimila	Manyara	Kota
Iringa	Iringa town Luxury	Manyara	Stand Kuu
Iringa	Iringa Town Miami	Manyara	Majengo Mapya A
Iringa	Iringa Town Holiday	Mara	Jackpot Bingo
Iringa	Mafinga Udimila	Mara	Nyasho Stand
Iringa	Iringa Town Luxury	Mara	Mkendo Kubwa
Iringa	Njombe	Mara	Musoma Bus
Iringa	Iringa Town Holiday	Mara	Baruti
Kagera	Soko kuu	Mara	Jack pot bingo
Kagera	Lina's pub	Mara	Mkendo Kubwa
Kagera	Lina's night club	Mbeya	Soweto
Kagera	Soko kuu	Mbeya	Mwanjelwa
Kagera	Hamugembe	Mbeya	Nzovwe

Kagera	Uswahilini street	Mbeya	Iyunga
Kigoma	Mwanga street	Mbeya	Mbalizi
Kigoma	Web Site	Mbeya	Sokoine Road
Kigoma	Sandra's bar	Mbeya	Uyole
Mbeya	Kyela Road	Ruvuma	Zanzibar
Mbeya	Uyole	Shinyanga	Maduka Mengi
Mbeya	Mama John	Shinyanga	Shycom
Mbeya	Soweto	Shinyanga	Mewa Malecos Hotel
Mbeya	Mafiati	Shinyanga	Majengo street
Morogoro	Kahumba	Shinyanga	Mewa Malecos Hotel
Mtwara	Kiyangu A	Shinyanga	Butiama disco theque
Mtwara	Sinani	Singida	NBC Club
Mtwara	Vigaeni	Singida	Mtaa wa Stendi
Mtwara	Kiyangu A	Singida	NBC Club
Mtwara	Bima	Singida	Petro Cabanas
Mtwara	Chikongola	Tabora	Postal Area
Mtwara	Kreлуу	Tabora	Near police post
Mtwara	Kiyangu A	Tabora	New Stand
Mtwara	Bima	Tabora	Bachu street
Mtwara	Uwanjani	Tabora	Club Royale
Mtwara	Bima	Tabora	Bachu street
Mtwara	Kreлуу	Tabora	Postal Area
Mtwara	Vigaeni	Tabora	Club Royale
Mwanza	Kirumba	Tanga	High way
Mwanza	Pansias	Tanga	Chumbageni
Mwanza	Royal pub area	Tanga	High way
Mwanza	Pasiansi	Tanga	Maghorofani
Mwanza	Nyakato mecco	Tanga	Minazini
Mwanza	Nyakato national	Tanga	Chumbageni
Pwani	Chalinze	Tanga	Minazini
Pwani	Mkuranga	Tanga	Minazini
Pwani	Chalinze	Tanga	Chumbageni
Pwani	Kibiti A	Tanga	Minazini
Pwani	Kibiti A	Tanga	Central police
Pwani	Kibiti B	Tanga	Central police
Pwani	Mkuranga	Tanga	Saba saba
Rukwa	Sumry Street	Tanga	Barabara ya tatu
Rukwa	Soko Matola	Tanga	Masiwani
Rukwa	Mtaa wa Fisi	Tanga	Barabara ya tatu
Rukwa	Kasema	Unguja	Jozani area
Rukwa	Soko Matola	Unguja	Nungwi north
Rukwa	Mtaa wa Fisi	Unguja	Jozani area
Rukwa	Kiwele Street	Unguja	Nungwi south
Ruvuma	Mfalanyaki B	Unguja	Jozani area
Ruvuma	Mfalanyaki A	Unguja	Nungwi north

ANNEX 5: PSI-TANZANIA OPERATIONAL ZONES



ANNEX 6: SELECTED HOTZONE MAPS

Legend:

- Salama or Salama Studs available or Salama 3Bomba, no other condoms available
- ▲ Salama or Salama Studs available or Salama 3Bomba, other condoms also available
- ⊕ Salama or Salama Studs available or Salama 3Bomba, Dume also available
- No Salama or Salama Studs available or Salama 3Bomba, but Dume available
- No Salama, Salama Studs, Salama 3 Bomba or Dume available, but other condoms available
- ◆ No condoms available at all

Arusha: Sombetini Road, Makao Mapya and Sanawali Hotzones

