



## RESEARCH SUMMARY



### Total Marketing Approach (TMA) Studies in 10 ESA Countries



#### Synopsis

These studies were conducted in 10 countries in order to apply the total market approach principles and methodologies to a range of contraceptives to help design more effective family planning programmes that better meet the contraception needs of all and contribute to universal health coverage.

The ultimate aim is to rationalize the provision of family planning services for long-term sustainability. The studies also looked at the role of private health insurance. The 10 countries include Botswana, the Democratic Republic of the Congo, Kenya, Lesotho, Madagascar, Namibia, Swaziland, Tanzania, Uganda and Zimbabwe. The studies in Kenya, Madagascar, Uganda and Zimbabwe were carried out in 2016, and the remainder in 2017.

#### Research lead and Budget

Dr. Kanyanta Sunkutu; US\$104,018

#### Objective

The objective was to assess contraceptive markets in the 10 countries to assess why, how and where the markets are failing to meet the contraceptive needs of the eligible and willing populations. The study aims to generate an understanding of the total market for modern contraceptive commodities by assessing the current family planning landscape and available market data, and identifying market constraints and programmatic gaps that prevent equitable and sustainable use of family planning commodities. The contraceptive 'market' includes all actors working in contraception, from the public, private or social marketing sectors, as well as other agencies that affect the enabling environment for contraceptive products.

#### Methodology

A regional consultant and 10 country-specific consultants were hired. Standard data collection tools were developed and field tested. The roadmap, methodology and tools for the study were based on market system frameworks and pioneering work from various organizations, including Abt Associates, PATH, the Springfield Centre, and Population Services International (PSI).

Data was collected, analysed and presented at 10 country consensus generation meetings convened by respective governments to enhance national leadership and generate ownership.

The task of assessing the markets included (1) national family planning environment: policies and regulations, financing, and institutional capacity; (2) mapping public, NGO and commercial players: performance and core roles; (3) who the family planning market is failing – needs versus use; underserved populations; (4) how the family planning market is failing to meet the needs of populations; why the markets are not sustainable; and (5) assessing support/coordination mechanisms for the implementation of a TMA initiative.

#### Limitations

Due to time and resource constraints, no new population-based data were collected, nor was a new statistical analysis of available raw data carried out. The study was also strictly time and budget bound. There was inadequate participation by the private sector.

## Key findings

TMA concepts were not well understood; for example, there was indiscriminate provision of free supplies, even where they are not needed, for people who can afford to pay for them. High dependence on donor and foreign support resulted in poorly targeted free or subsidized commodities crowding out the commercial sector. Almost all markets are at a less-than-optimal stage of development (apart from Kenya, and possibly Madagascar and Zimbabwe), which means that governments are the major providers of contraceptives, even though their stewardship and coordination roles are inadequate. Neither do they engage private sector players.

## Lessons learned

There is a need for TMA champions. Engagement of private/commercial sector is inadequate. A government stewardship role is important for success and sustainability. Disparity exists in in-country TMA skills.

## Implications

Policy dialogue and advocacy to rationalize service provision so that clients who can afford to pay should be graduated to the commercial sector. Involves changes to procurement and SCM management. Drive towards reduced donor dependency and sustainability: countries to take on more funding of services – increased national government budgets and private sector participation.

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