

SUMMARY OF DISCUSSIONS

**WIDER
COLLABORATION,
SHARPER
COMMUNICATION:
CONDOM ALLIANCE
ACCELERATES
COLLECTIVE ACTION**

Fourth Condom Alliance meeting | October 23, 2020



The year 2020 has spotlighted the importance of health care. The COVID-19 pandemic has emerged as an inescapable catalyst, forcing health care marketers and policymakers to revisit priorities and redraw strategies. For the Condom Alliance — India's first coalition of condom manufacturers, marketers, domain experts, implementation agencies, and donors — the pandemic has reinforced the need for purpose-driven, evidence-based collective action around promoting condom use. The Alliance's aim of reviving condom demand not only makes great business sense but is also a social imperative, given the high unmet need among India's burgeoning youth population. Now more than ever, collaboration is critical to how well the condom market responds to these needs and shapes its own growth trajectory.

It was against this backdrop that the Condom Alliance held its fourth meeting on October 23, 2020. The virtual gathering was attended by about 50 stakeholders, including India's leading private condom manufacturers and marketers who together represent 85 percent of the country's condom market share. The Condom Alliance's widening engagement and confident journey since it began taking shape in January 2019 are a testimony to its shared value potential.

The discussion started by focusing on the challenges and opportunities the pandemic has presented. The group also examined trends in the condom category based on analysis of market data, and its three sub-committees shared progress since the Alliance's last meeting in February 2020.

This short report summarizes key takeaways from the day's different discussions and the immediate next steps for the Alliance.

CONDOM ALLIANCE: AN ENERGETIC JOURNEY SO FAR, AN EXCITING ROAD AHEAD

Born from a collective vision to realize shared value and make deep social impact, the Condom Alliance has covered much ground since it began less than two years ago in January 2019. The multi-stakeholder group has met regularly to deliberate on and shape strategies to drive growth in the condom category. Its charter has been unanimously ratified by all partners, and there is consensus on its structure, broad governance principles, and strategic thrusts to generate demand for condoms among youth. Three sub-committees have been formed under the leadership of nominated leads to steward progress on unanimously identified short-term priorities of the Alliance.

Rising to the challenge of the COVID-19 pandemic, the Condom Alliance has been proactively bringing various stakeholders together for larger dialogues. Alliance members recently met with the Ministry of Health and Family Welfare (MoHFW) to evolve the government's understanding of how it could help mitigate the condom manufacturing and distribution challenges being faced amid COVID-19 related restrictions. Inputs from marketers also assisted MoHFW in estimating the domestic demand and production capacity for condoms and helped the Ministry determine that restrictions were not needed on condom exports. The Condom Alliance has also been responding to its members' information needs by disseminating timely insights, such as the group's recent webinar to share findings from an analysis of IQVIA data (MAT March 2020) on the condom, oral contraceptive pill, and emergency contraceptive markets.

There is clear appreciation, among both members and other stakeholders, of the important role that the Condom Alliance is playing to rejuvenate the condom category. There is also a clear felt need that the Alliance should continue being a vital platform for collective action and its activities should gain momentum. Responding to the immediate sustainability needs of the Alliance, the United States Agency for International Development (USAID), which provided seed funding to initiate and sustain the Condom Alliance thus far, has agreed to continue supporting it in the short term while the Alliance secures a different donor or funding mechanism to take over. In her opening address, Moni Sagar, Development Assistance Specialist (Innovation) at USAID/India, announced that USAID will continue to support the Alliance until June 2021. Sagar also

shared with the group that USAID has signed a memorandum of understanding (MoU) with Reckitt Benckiser, one of India's leading condom manufacturers and a member of the Condom Alliance, to work together in several areas of health, including sexual and reproductive health.

The Sustaining Health Outcomes through the Private Sector (SHOPS) Plus project, USAID's flagship initiative in private sector health, has been hosting the Alliance secretariat and serving as the anchor partner. SHOPS Plus brings to the Alliance its demonstrated expertise in developing and implementing innovative communication campaigns. In her presentation, Komal Khanna, SHOPS Plus Chief of Party, shared that the project's social and digital media campaigns have already reached 30 million people and won accolades. SHOPS Plus's '50 Shades of ISHQ' campaign on Bobble AI, a highly popular smartphone keyboard app, recently won the gold prize at ETBrandEquity.com Shark Awards. The project is also expanding its communication scope, including development of an integrated digital communication campaign on intimate partner violence and family planning.



In less than two years since it began, the Condom Alliance has made impressive progress... It is providing a vital platform for many condom manufacturers, marketers, and development partners to come together to create shared value and to also have a constructive dialogue with the government."



Moni Sagar
Development Assistance Specialist (Innovation), USAID/India



INSIGHTS FROM THE CONDOM MARKET

The COVID-19 pandemic has unleashed uncertainty onto every sector. Navigating this uncertain time demands one stay tuned to what the data says and keep a steady finger on the pulse of the market. The Condom Alliance’s meeting agenda thus marked time for a discussion on the emerging trends in the condom market. In a session moderated by Amit Taneja from SHOPS Plus, condom marketers shared their experiences in the wake of the pandemic and the extent to which the condom market has recovered to pre-COVID levels. Key takeaways from the marketers’ observations are listed below:

- The condom market suffered a steep decline in the initial months of the pandemic, but demand is now returning.
- While demand is looking up, sentiment remains conservative and people are not buying condoms in the quantities that they used to.
- Many small local players have entered the market and introduced their own brands of condoms. However, they may face sustainability issues because ensuring high quality is very critical for this product.
- Entry of local players is increasing the competition for social marketing brands, which are already struggling with narrow margins.



The first quarter was bad, but we are already back to 90 percent of the pre-COVID levels. Our visibility is great now, and we expect a 360-degree change in the next three months.”



Balaji B.S.
Business Head,
TTK Healthcare

The group also looked at trends in the condom category based on an analysis of market data by Population Health Services India (PHSI), a partner of the Condom Alliance. PHSI has used a total market approach to understand the condom market from all sectors. Lokesh Nagpal from PHSI presented an analysis of IQVIA RMS (ending March 2020) data, focusing on condom marketers’ penetration into the dealer/seller landscape. The data on the numerical distribution of dealers indicated that market leader in condoms is able to place its brand only across 40% of the overall dealers handling condom category. Hence the crux for any marketer is to identify and present their brand at the right outlet. An understanding and analysis of dealer performance metrics help improve the overall quality of dealership. Amongst the various metrics, weighted distribution of dealers and share amongst handlers are the most useful to understand and analyse. Measuring and Improving these metrics over time shall enable both private and social marketers to maximise per dealer output (PDO) whilst optimising costs related to management of dealership and distribution.



My visit to rural parts of West Bengal and Odisha shows green shoots in condom demand. The trend is definitely positive, but people are not yet investing as much as before.”



John Bosco Vaz
Chief Manager CSMP,
Parivar Seva Sansthan





CONDOM ALLIANCE SUB-COMMITTEES: ELEVATING IMPACT

The Alliance's three sub-committees have been hard at work since a clear delineation of goals and approaches at the group's last meeting in February 2020. The meeting provided them an opportunity to share their progress, a brief summary of which is presented below.

Sub-committee 1: Creating thought leadership ideas and products

As India's first-ever collective of condom market stakeholders, the Condom Alliance seeks to emerge as a thought leader and the go-to body for information and insights on the condom market in India. Sub-committee 1 is focused on creating visibility, credibility, and support for the Alliance and its efforts to unlock the market and meet the reproductive health needs of India's youth. Ravi Bhatnagar, Director-External Affairs and Partnerships at Reckitt Benckiser and the lead for Sub-committee 1, announced the selection of a public relations (PR) agency — PR Pundit — selected by SHOPS Plus team to build the Alliance's thought leadership and reputational capital. Bhatnagar remarked how a rigorous process was used by SHOPS Plus to select an agency that could align the Alliance's brand purpose and social purpose and help it deliver ideas that can drive change.

Neha Singhvi, Chief Operating Officer at PR Pundit, provided an overview of its strategic communication plan for the Condom Alliance. The agency has done groundwork on how the Condom Alliance should be positioned: as a cohesive and committed industry body dedicated to the cause of improving sexual and reproductive well-being of adolescents and youth in India. Singhvi provided a snapshot of how the

strategic communication plan will seek to create awareness and goodwill for the Alliance through effective traditional and new age media approaches, including a logo and a website for the Condom Alliance, partnership with youth brands, by-lined articles, speakership opportunities, and a *Condomology* Report that provides an innovative take on the interplays between consumers, psychology, and condom choice.

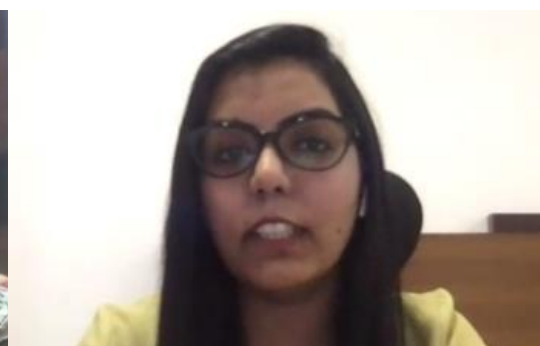
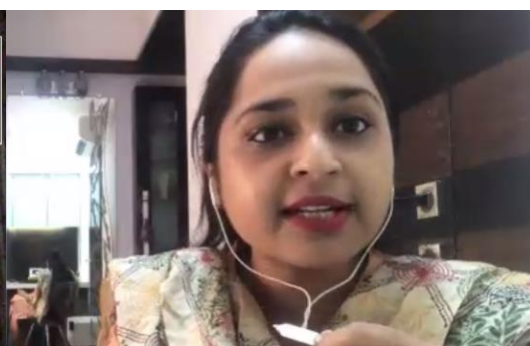
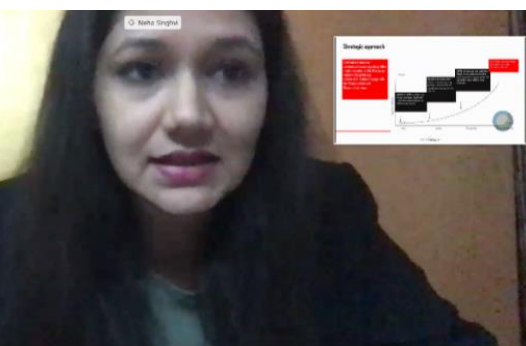
To take this effort forward, Sub-committee 1 and the PR agency plan to organize a workshop next month (November 2020) for members to discuss, provide inputs, and help finalize the strategic communication plan.



The momentum and kind of engagement we have seen (with Condom Alliance) is impressive, next level. We will see many things change with COVID, but Condom Alliance should continue... I'm hoping to see our consortium rank high on innovation and foster progress on SDG 17, which is about partnerships."



Ravi Bhatnagar
Director-External Affairs
and Partnerships,
Reckitt Benckiser



Sub-committee 2: Creating new users among youth

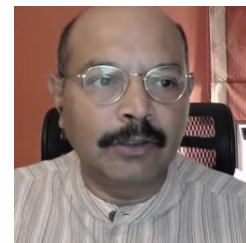
The Condom Alliance has a “digital-first” approach to reach today’s generation of digital native youth. The youth must be spoken to in their own language and reached through platforms they trust and frequent. With this strategic consideration, Sub-committee 2 has been working on the first digital campaign under the auspices of the Condom Alliance. The soon-to-be-launched campaign is being developed by Tonic Worldwide, SHOPS Plus’s partner agency for digital media.

Ankita Chauhan, Group Head at Tonic Worldwide, gave the Alliance members a quick glimpse of the digital campaign’s exciting components built around an original song — *KaunDumbHai* (meaning, who is dumb) — that interestingly sounds like the word ‘condom’. The catchphrase of the song is highly colloquial and has a direct connect with the campaign’s aim. The song and its messaging (“Don’t be dumb, use condom”) will be amplified on multiple digital platforms creatively through a dance challenge, a fun sex dictionary, games, meme pages, and vox pop, among others. The digital campaign will also integrate with Bobble AI. Anika Tanwar, Business Head-Marketing Solutions at Bobble AI, shared how Bobble AI will amplify the campaign across digital platforms and apps.

The digital campaign itself is brand agnostic but condom marketers can associate with it and show themselves part of a larger purpose, amplify it on their own digital assets, and also utilize the numerous branding opportunities the digital campaign will create. The campaign will present a host of branding opportunities, such as branded content on Bobble AI; product placements in the theme song video, dance challenge, game, and vox pop; partnerships with micro influencers and tech influencers; branded memes; and branded word associations in the *KaunDumbHai* dictionary. SHOPS Plus and the creative agency plan to reach out to Alliance members to explore these opportunities in greater detail.



USAID’s support has given birth to the Condom Alliance, and it is doing work of great value. It must continue... We need to answer the tricky question of how its future can be secured.”



Anand Sinha
Country Head at
David & Lucile Packard
Foundation

Sub-committee 3: Creating a sustainability roadmap for the Condom Alliance

Having a robust sustainability pathway is critical to securing the Condom Alliance’s continuance as a platform for India’s condom market players. Anand Sinha, Country Head at David & Lucile Packard Foundation and the lead for Sub-committee 3, highlighted that the Condom Alliance is extremely important and crucial attention must go toward its sustainability. To better inform the Alliance’s sustainability roadmap, SHOPS Plus has conducted a landscape review of alliances worldwide — desk research, followed by key informant interviews with alliances — to capture lessons on key areas, including the inception and growth of an alliance, membership, funding, governance, evolution, and leadership and knowledge management. Aprajita, Director-Partnerships at SHOPS Plus, presented the key findings from the landscape study.

Insights from the landscape study point to aspects that Condom Alliance must prioritize going forward. The first recommendation is to secure funding for the Condom Alliance secretariat for a minimum of three years. Having a full-time secretariat during this growth phase of the Alliance is critical to strengthen membership. The Alliance could explore a pooled model, where corporate and donors co-invest in the secretariat and working group activities/initiatives. In the next one to two years, Condom Alliance should also build on and aggressively communicate its member value proposition and strengthen its reputational capital. Its activities should include strategic communications, toward which Sub-committee 1 has already taken a step; creation of knowledge management assets (including digital); and identifying and leveraging champions/ambassadors for the Alliance. The Condom Alliance should also continue to undertake activities that build trust among its members as well as with other stakeholders, including the government, and the broader community.



NEXT STEPS

The meeting concluded with a clear set of next steps for the group:

- Organize a workshop to finalize the strategic communication plan for the Condom Alliance; the workshop is tentatively planned for the second week of November
- Launch the digital campaign and explore branding opportunities with marketers over the next month
- Finalize the terms of reference (ToR) for a chairperson to head the Alliance by November
- Reach out to donors to explore funding opportunities by end of this year

List of participants

S. No.	Name	Organization
1	Abhilash Philip	Abt Associates
2	Abhishek Saurabh	Hindustan Latex Family Planning Promotion Trust (HLFPPT)
3	Amit Kumar Taneja	Abt Associates
4	Anand Sinha	Packard Foundation
5	Anika tanwar	Bobble
6	Ankita Chauhan	Tonic Worldwide
7	Anuradha Nair	HLL Lifecare Limited
8	Aprajita	Abt Associates
9	Ashok Raisinghani	Abt Associates
10	Awdhesh Yadav	Abt Associates
11	Brijj Balaji Singh	TTK Healthcare
12	Conjeevaram Haricharan	Abt Associates
13	Dr. Bimla Upadhyay	UNFPA
14	Dr. Pragati Singh	World Health Organization (WHO)
15	Himanshi Munjal	PR Pundit
16	John Bosco Vaz	Parivar Seva Sansthan
17	Kapil Vachhar	Vihara Innovation Network
18	Karishmah Bhuwantee	Abt Associates
19	Kavita Kanwar	PR Pundit
20	Kavita Sharma	Abt Associates
21	Dr. Kirti Iyengar	United Nations Population Fund (UNFPA)
22	Komal Khanna	Abt Associates
23	Krishnan Hariharan	Independent Consultant
24	Lokesh Nagpal	Population Health Services India (PHSI)
25	Manika Rana	Vihara Innovation Network

S. No.	Name	Organization
26	Meera	Infinity
27	Mehak Mann	Abt Associates
28	Michael Atengdem	Abt Associates
29	Moni Sagar	United States Agency for International Development (USAID)
30	Neha Singhvi	PR Pundit
31	Nidhi Bhatt	WHO
32	Nikhil Mylavarapu	Raymond Group
33	Pierre Frederick	DKT India
34	Prema Dutta	PR Pundit
35	Priyanka Anand	Abt Associates
36	Rajesh Jamuar	Abt Associates
37	Rajnigandha Kalra	Independent Consultant
38	Ravi Bhatnagar	Reckitt Benckiser
39	Riya Juthani	Bobble AI
40	Sagar Sachdeva	YP Foundation
41	Sandeep Kumar Jain	The Associated Chambers of Commerce and Industry of India (ASSOCHAM)
42	Sandeep Punia	Mankind Pharma
43	Vinita	Quilt AI
44	Viplav Vinod	Abt Associates
45	Vipul Arora	Tonic Worldwide
46	Vishal Vyas	TTK Healthcare
47	Vithika Yadav	Love Matters
48	Vivek Malhotra	PHSI

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