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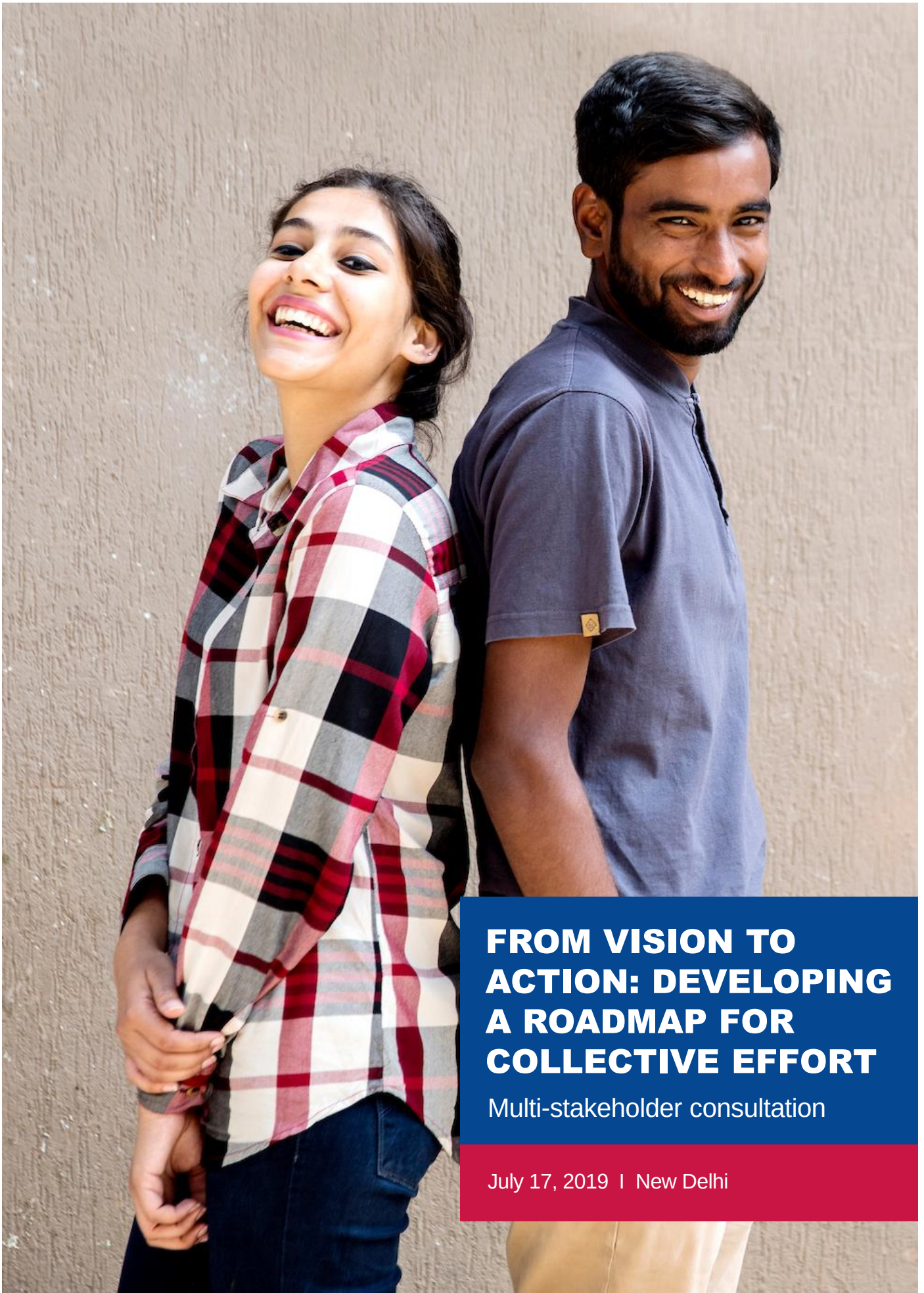


FROM VISION TO ACTION: DEVELOPING A ROADMAP FOR COLLECTIVE EFFORT

Multi-stakeholder consultation

July 17, 2019 I New Delhi

SUMMARY OF DISCUSSIONS

On July 17, 2019, the Sustaining Health Outcomes through the Private Sector (SHOPS) Plus program convened the second chapter of its multi-stakeholder Condom Alliance consultation in New Delhi. Thirty participants gathered to define the Condom Alliance's structure, functioning, and strategic thrusts going forward after its inception earlier this year. They included nine of India's leading contraceptive manufacturers and marketers, major media and advertising players, technical experts, implementing agencies, and international donors. The engagement and enthusiastic participation by these diverse partners cemented and built upon the strong foundation for collaboration that the first meeting of the Condom Alliance on January 30 had successfully established. Through a series of presentations and discussions, the attending partners explored, examined, and reached consensus on the nuts and bolts of the alliance, the key issues and challenges it must address, and its focus areas in the short term. The event culminated in a unanimous ratification of the Condom Alliance charter by all partners present.

Many of the discussions were aimed at reaching consensus on key factors to help define the roadmap for the Condom Alliance. One key area of agreement was that the condom market has huge potential for growth, especially given India's large and burgeoning youth population. Others included the idea that demand creation was a critical imperative to revive the condom market, and that urban areas were key to driving the condom category's growth in the country. By the end of the consultation, it was clear that the roadmap should focus on bolstering the demand for condoms among India's urban youth.

As SHOPS Plus is implementing a multi-pronged communications strategy to do just that, the project sought the partners' inputs on a creative brief it has drafted to support the alliance in launching its first condom category revival campaign. The partners highlighted the need to differentiate condoms from other contraceptive products, like emergency contraceptives, and recommended targeting both sexual debutants and regulars. Another important part of the consultation's agenda was identifying and discussing the key focus areas for the Condom Alliance in the short term: developing thought leadership products and ideas, creating new users among youth, and sustaining the Condom Alliance past the life of SHOPS Plus. To facilitate in-depth discussions on these themes, participants were divided into three sub-committee groups, each of which identified short-term priorities within a given thematic area along with the partner who would lead that area (these ideas are detailed later in this report). The group work also helped define the immediate next steps in the roadmap: creating a mechanism for sharing information and data; providing inputs on the creative brief and the Condom Alliance charter and membership manual; and defining the terms of reference for the Condom Alliance's sub-committees.

This report presents the consultation's key takeaways on the imperatives and opportunities for strong collective action to increase demand for condoms among India's urban youth.

THE CASE FOR COLLABORATIVE ACTION

The case for ramping up efforts to improve condom uptake is compelling for India, home to the world's largest population of those under 25 years of age. In spite of the fact that condoms are an easily accessible, easy-to-use contraceptive method, India's public health system is geared to the family planning needs of married couples, and thus condom use among sexually active unmarried males is low: just 24 percent of 15–19-year-olds and 14 percent of 20–24-year-olds. Increasing use of condoms will not only foster safer sexual practices, but also makes tremendous market sense. India's large and growing youth cohort could be a huge source of growth for the condom market, which has been stagnating at a compound annual growth rate of about 1 percent for most of the past decade.*

The USAID-funded SHOPS Plus project sees revival of the condom market as imperative to address the needs of those who are sexually active yet do not want to have children. It is also an opportunity for the private sector to partner with the government of India while also realizing value and volume growth. To take advantage of this opportunity, SHOPS Plus supported the formation of an alliance of condom manufacturers and marketers to coordinate efforts and implement joint activities to generate demand for condoms among adolescents and youth in urban areas, where condom use has declined over time, from 9.8 percent in 2005 to 9.1 percent in 2015 (National Family Health Survey 4).

The first meeting of potential Condom Alliance partners was held on January 30, 2019. Participants explored the need and opportunities for collaboration and reached the unanimous agreement that "joint action is imperative to expand the condom market in India and urban youth must be the focus". This early consensus among potential Condom Alliance partners was a clear and a powerful win. The present meeting, on July 17, gave the group an opportunity to deliberate on the Condom Alliance's structure and agenda, examine the condom market landscape (MAT March 2019 – IQVIA; see key insights below), explore the contours of the first condom category revival campaign to be launched under the aegis of the Condom Alliance, and its charter.

* Overview of Key Family Planning and Child Health Categories, A Landscape Analysis, Abt Associates, July 2018. Data source: Nielsen RMS Data for the Period March 2014 to March 2018, HMIS data from 2014 to 2017.

CONDOM ALLIANCE

The consensus in place

- Category revival is a common agenda for all players, and joint action will benefit everyone.
- Demand generation is key to achieving the agenda of the alliance.
- India's burgeoning youth population presents massive opportunities for market growth and should be the focus of demand generation.
- Nuanced, evidence-based demand generation campaigns are needed to address knowledge gaps and negative perceptions regarding condoms among youth.
- Traditional ways of reaching the youth alone will not work. Digital/online approaches should be part of the campaign strategy.

Key insights on the condom market

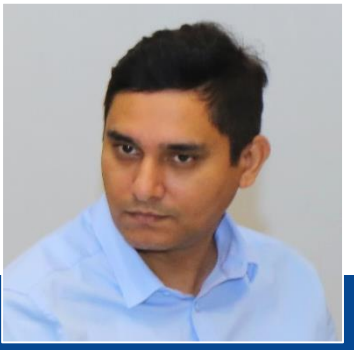
- Analysis of sales audit data shows that after a slight decline for three years between 2014 and 2017, the condom market appears to have picked up in the last two years. The compound annual growth rate of the market for the last five years stands at 3 percent in volume terms and 11 percent in value terms.
- Nationally, the priced condom market size is 2.3 billion pieces valued at INR 1,444 crores.
- Urban areas (metro cities, class 1 cities, and smaller towns) account for 63 percent of the condom market volume and 71 percent of the value.
- Both volume and value growth in the last two years came largely from metro cities, rural areas, and smaller towns. In contrast, middle-tier towns have not seen substantial growth.
- In terms of trade channels, chemists contribute 76 percent of the condom market volume and 80 percent of the value. Grocers/general stores are a distant second, with 17 percent volume and 12 percent value share.
- The market is mostly driven by commercial players, who account for 67 percent of the market volume and 87 percent of the value share. With 33 percent volume share and just 13 percent value share, the large role social enterprises play in catering to volumes market is evident. Notably, commercial enterprises are stronger in metros and urban markets, while social enterprises have a stronger hold in rural and semi-urban markets.
- The six SHOPS Plus states together account for 10 percent volume and 11 percent value share of the national market. Delhi is the largest in terms of volume and value, and Assam the smallest. The other four states — Chhattisgarh, Uttarakhand, Odisha, and Jharkhand — are similar in terms of volume and value.
- The top ten condom manufacturers/marketers together command more than 80 percent of the condom market in volume and value terms.
- In terms of potential, India's 375-million-strong young population (10–24 years) presents a fantastic opportunity to grow the market. Making condoms relevant to adolescents (10–14 years) as they prepare for their sexual debut and retaining sexually active consumers in other age bands (15–19 and 20–24 years) will be the key to establishing a thriving market. Also crucial will be to retain the consumer as he/she grows and transitions in the contraceptive value chain.

SHOPS Plus

Catalyzing public-private partnerships to improve health outcomes

SHOPS Plus is focused on harnessing the potential of the private sector and catalyzing public-private engagement to increase the use of family planning, child health, and tuberculosis treatment products and services among the urban poor. The project's approach has begun to generate momentum: SHOPS Plus' TV campaign for oral contraceptive pills (OCPs) has been adopted by the Government of India for nationwide release, and the Union Health Minister released the OCP campaign on World Population Day; the government is expected to invest in airing the campaign. SHOPS Plus is also planning co-execution of various on-ground activation prototypes with Pfizer and PSI India Pvt. Ltd. Crucial work with its partner MTV and TinkerLabs is also underway.

These developments demonstrate the exciting potential public-private partnerships have to improve health outcomes. The Condom Alliance is expected to foster a similarly successful multi-sector partnership to invigorate the condom market and contribute to the health and well-being of adolescents and youth. Private sector engagement also aligns with the Government of India's strategy for FP2020.



"A major shift is happening from brick and mortar stores to e-commerce. Also, maximum repeat orders are coming from tier II and tier III cities, especially for mass packaged products. When looking at a communications strategy for the highly segmented target group, we must look at disaggregated data, even on where mass package purchases is happening versus small package buying."

Ravi Bhatnagar,
Director External Affairs and Partnerships,
Reckitt Benckiser

ENGAGEMENT WITH YOUTH-FOCUSED ORGANIZATIONS

There is consensus among Condom Alliance partners that traditional ways of engaging with the youth will not work. The Condom Alliance needs to speak to the youth in their own language and reach them on platforms they trust and frequent. With this strategic consideration, the alliance invited three youth-focused organizations — MTV, Love Matters, and TinkerLabs — to be part of the consultation. As a Condom Alliance partner, Love Matters is bringing to the group its on-the-ground understanding of the reproductive issues that adolescents and youth face.

With MTV, SHOPS Plus has a broader engagement. The two are partnering for an enter-educate (E-E) campaign — titled Nishedh (meaning, taboo) — to deliver family planning and reproductive health information to unmarried youth 15–24 years of age. The partnership is leveraging MTV Staying Alive Foundation's immense reach as a youth entertainment brand ambassador to foster sexual and reproductive health behavior change. The soon-to-be-launched multi-platform Nishedh campaign will include a TV show, a radio show, a comprehensive digital strategy, and peer education activities.

SHOPS Plus is also partnering with TinkerLabs to develop a robust understanding of the target group (unmarried youth of 18–24 years) and their drivers, barriers, and influencers around sexual activity. TinkerLabs is using design thinking to arrive at a granular understanding of the consumer through a deep process of empathy and an experimental approach to create innovative solutions around condom usage. A collaborative process, involving all stakeholders and Condom Alliance partners, will allow co-creation of approaches to more effectively reach youth. The solution prototypes will then be tested with real users to identify and refine the ideas that work and abandon those that do not. This process will prove critical for Condom Alliance to develop category revival campaigns that are user-centered and successfully address the target group's barriers to condom use.

During the consultation, a presentation around design thinking generated an enthusiastic discussion among Condom Alliance partners about some major considerations to bear in mind. Key points from the discussion are presented below.

> *Condom messaging has journeyed over time from a family planning product to HIV prevention to now a product of pleasure, and not just for men."*
>
> **Vithika Yadav,**
> Head, Love Matters/India

KEY POINTERS TO INCREASE CONDOM UPTAKE

Be data driven.

- Along with the desk, secondary, and primary research planned as part of the design thinking process, ethnographic data on socio-cultural norms and sub-cultural norms around why people do or do not use condoms should also be considered.
- The target group of 15–24 years is a diverse and large segment. Research must identify differentiated needs, for example, those who are/will soon be debutants and those who are already practitioners.
- Sex is a highly taboo topic in India. Experiential data and insights must be made part of the discussion and of the impact matrix.
- Psychographic profiles are also crucial to consider.
- Related topics such as trends and changing relationships with peers and parents must also be explored to get a more comprehensive picture.
- The mobile/online media is where the young live and ask questions. This data is particularly crucial to understand purchase intent.
- Use of Google analytics to ascertain who is seeing what, what the search words are, and what the peaks traffic times are can help get a better understanding of the consumer and also better evaluate the performance of messages and content.
- A wide variety of data already exists and should be made available to Condom Alliance partners.

At the category level, only condoms are male-focused contraceptives. We must make sure the category stays relevant to all users, be they debutants or regular users."

Amit Kumar Taneja,
Deputy Director - Brands, PSI India Pvt. Ltd.

Test and identify what works.

- Testing of solution prototypes should be done in a fast-paced manner using the sprint methodology.
- The solutions must be tested at scale. The Condom Alliance platform provides that opportunity.
- The audience is highly segmented in nature, and the messaging will reach more than one profile of audience. This should be accounted for as we look for social and behavior change communication interventions. However, scaling segment-specific marketing will require enormous funding, which may not be available.
- In scaling solutions, online dissemination often comes up as a top choice and can be a powerful mode to reach the masses. However, it should be borne in mind that as soon as such material is posted on Facebook or YouTube it can get blocked, and young users can also get exposed to risk of harassment.
- Each time solutions are tested, some will be retained and others rejected. However, given that the different partners represent different perspectives, rejected solution(s) may make sense to another member with different capabilities. As a result, rejected solutions should also be made available to the group with an explanation of why some did not find it viable.

CO-CREATION OF A CREATIVE BRIEF FOR THE CONDOM CATEGORY REVIVAL CAMPAIGN

Category promotion through a nuanced demand generation campaign had unanimously been placed on the Condom Alliance's agenda in its first meeting. As the group's first anchor partner, SHOPS Plus has since drafted a creative brief for the campaign to address negative perceptions regarding condoms use among unmarried urban youth 15–24 years of age. The brief is geared to increase demand for condoms among youth by making condom use non-negotiable on sexual debut and subsequent encounters. It seeks to achieve this goal by triggering changes at attitudinal, normative, and behavioral levels. The Condom Alliance's second consultation gave its different partners — the private sector, public health, donors, and social sector — an opportunity to discuss the creative brief and arrive at a better understanding of what messages the Condom Alliance's first condom category revival campaign should carry, to whom, and how. Key points from the discussion are summarized below.

As a group, we must have clarity about who our messaging will target and who it will speak to — men or women. We need to define the problem statement before we define our communication strategy."

Girish Ramachandran,
Senior Manager - Marketing,
TTK Protective Devices Limited

When looking at the target audience, we need to see who is really in need of a condom, who suffers when a condom is not used: it is women. We need to target them with our messaging. She should put her foot down and say 'no condom, no sex'."

Ajay Rawal,
General Manager - Marketing,
Raymond Consumer Care

KEY POINTERS

Pitching condoms as a contraceptive of choice

- The space that condoms occupy compared to emergency contraceptives (ECs) should be examined. The present brief's key message around condoms alleviating the uncertainty after a sexual act can also be addressed by ECs. Although condoms are a pre-coital choice and ECs post, the consumer is not bothered with this technical difference and mostly looking at contraception to avoid pregnancy.
- Messaging around condoms should promote their unique ability to provide triple protection from pregnancy, HIV, and sexually transmitted infections (STIs). No other contraceptive method ensures all three.
- The STI/HIV pitch may not resonate as strongly with younger users who do not have sex with multiple partners. Instead, messaging could point out that condom use does not inhibit pleasure but enhances it, given its ability to remove the fear of unwanted pregnancy and allowing the couple to focus fully on the act.

In devising a communications strategy for condoms, it would be useful to do a competitive analysis with ECs. One of the main drivers for condom use is unplanned sex and that's what EC are also used for. Comparing a condom with other long-term methods or for HIV/STI protection may not make as much sense."

Anand Sinha,
Country Advisor, David and
Lucile Packard Foundation/India

Targeting users effectively

- Sexual debut is a small market, and there is a need to look at the entire sexual journey of an individual. The thinking in the present creative brief is that if a condom is used at sexual debut, there is greater likelihood of it being used across the sexual journey.
- Condoms, unlike ECs, are perhaps more relevant to those having sexual intercourse more frequently. The idea of being prepared for sex becomes relevant when it is a regular act.
- Often sexual debut is not planned, or the male partner may not want it to be seen as planned to avoid being misinterpreted as promiscuous behavior. Men may fear that carrying a condom may result in him being perceived as having planned the intercourse. Even among couples having sex regularly, when condoms are used alongside other contraceptives, men are seen as promiscuous by their partner.
- There is a need to normalize the conversation around sex, and campaigns to this effect should be regular and updated, because the cohort for debut changes fast.
- The Condom Alliance must examine what is trending, such as a big cricket series or change of season, and use those opportunities to make condom use look relevant.

DEFINING THE CONDOM ALLIANCE'S STRUCTURE AND FORWARD PATH

The Condom Alliance has brought together key stakeholders who will work as a collective, coordinating efforts and implementing activities jointly to invigorate the condom market in India. SHOPS Plus co-created its charter with partnering condom manufacturers/marketers and donors. The charter states the Condom Alliance's strategic objectives, areas of focus, and vision of success. Its unanimous ratification by partners is testament to their commitment to collaborative action. As a next step, partners at the consultation participated in a group activity to identify the alliance's priorities in three areas: developing thought leadership ideas and products, creating new users among the youth, and creating a sustainability roadmap for the Condom Alliance. Three sub-committees were established to address each of these themes. Along with developing ideas that each sub-committee can pursue in the coming months, each group also identified who among them would be the leading partner(s). Key pointers from the group activity are presented below.

"We need a safe and dedicated space where all of us can share, learn, iterate, and improve. It is an important question before donors on how such safe spaces can be created to facilitate synthesized learning."

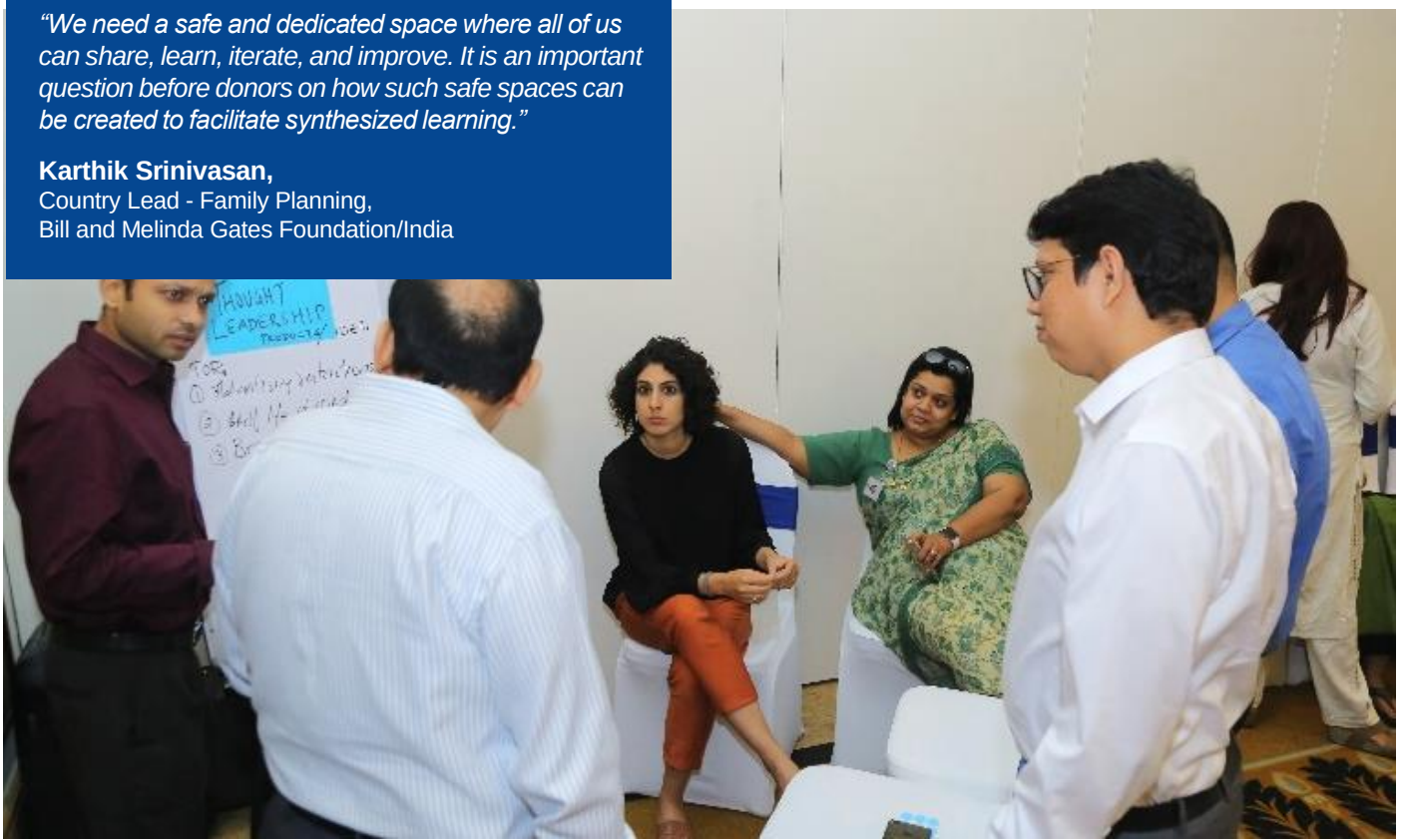
Karthik Srinivasan,
Country Lead - Family Planning,
Bill and Melinda Gates Foundation/India

KEY POINTERS

Developing thought leadership ideas and products

- Generate and distribute relevant evidence and insights among partners as well as with other stakeholders to create visibility, credibility, and support for the alliance.
- Create content/articles on regulatory hurdles that impact the condom market and how they can be overcome, covering topics like advertising restrictions, low shelf life of the product (three years in India compared to five years elsewhere), price ceiling, packaging instructions, and product classification.
- Disseminate the content using public relations firms and by advocating on different forums, especially targeting stakeholders in the government.
- Invest effort in developing products for the alliance's internal use, such as impact metrics.

Sub-committee leads: Amit Taneja, Deputy Director - Brands, PSI India Pvt. Ltd., and Sharda Prasad, Project Director, Comprehensive Social Marketing Unit, John Snow India Pvt. Ltd.



KEY POINTERS (Cont'd.)

Creating new users among the youth

- Collect and disseminate insights on new and potential users through research.
- Look at peer educators and influencers and plan specific activities around them.
- Examine the interplay between condoms and ECs and use that insight to position and promote condoms, especially among women.
- Make concerted efforts to address stigma at various levels.

Sub-committee leads: Girish Ramachandran, Senior Manager - Marketing, TTK Protective Devices Limited, and Ajay Rawal, General Manager - Marketing, Raymond Consumer Care

Sustaining the Condom Alliance

- Examine what gains traction over the next few months to inform the Condom Alliance's sustainability roadmap.
- Examine models of collaborative funding and see what has allowed the successful ones to thrive.
- Focus on evidence-building and research. Evidence generation could be the platform that keeps diverse players together, through the Condom Alliance or through a larger sexual and reproductive health collective.
- Develop the Condom Alliance as a platform to share insights and knowledge. It could serve as a knowledge hub for marketers, social sector, government, and donors.
- Ensure the Condom Alliance is seen as neutral, fair, and transparent and remains relevant for all.

Sub-committee leads: Anand Sinha, Country Advisor, David and Lucile Packard Foundation/India

NEXT STEPS

As the multi-stakeholder Condom Alliance and its plan of action takes a more solid shape, the following emerge as the next steps:

- Facilitate a mechanism to elect the steering committee for the alliance and facilitate a check-in every quarter.
- Create a mechanism/platform to discuss and share evidence and information.
- Provide specific inputs on the alliance's charter and manual as well as on the creative brief for the alliance's first condom category revival campaign.
- Develop detailed terms of reference for each sub-committee, working in close coordination with the sub-committee lead(s).
- Plan a meeting of the Condom Alliance in the next quarter.

LIST OF PARTICIPANTS
CONDOM ALLIANCE (July 17, 2019)

S.No.	Name	Organization
1	Abhilash Philip	Abt Associates
2	Abhishek Saurabh	Hindustan Latex Family Planning Promotion Trust (HLFPPT)
3	Ajay Rawal	Raymond Group FMCG Division
4	Akriti Saronwala	MTV Staying Alive Foundation
5	Amit Taneja	Population Services International (PSI) India Private Limited
6	Anand Sinha	The David and Lucile Packard Foundation
7	Andy Bhanot	Abt Associates
8	Ankit Vohra	Abt Associates
9	Ankur Grover	TinkerLabs
10	Anurag Prasad	Lowe Lintas
11	Aprajita	Abt Associates
12	Ashok Raisinghani	Abt Associates
13	Bushra Bashir	Quilt.AI
14	Conjeevaram Haricharan	Abt Associates
15	E.A. Subramanian	HLL Lifecare
16	Girish Ramachandran	TTK Protective Devices Limited

S.No.	Name	Organization
17	Joy Mohanty	Lowe Lintas
18	Kanika	Abt Associates
19	Karthik Srinivasan	Bill & Melinda Gates Foundation
20	Kavita Sharma	Abt Associates
21	Komal Khanna	Abt Associates
22	Manmeet Bhalla	Abt Associates
23	Mehak Mann	Abt Associates
24	Moni Sagar	USAID
25	Prateek Bhardawaj	Lowe Lintas
26	Priyanka Anand	Abt Associates
27	Priyanka Walia	Lowe Lintas
28	Ravi Bhatnagar	Reckitt Benckiser
29	Sharda Prasad	John Snow, Inc (JSI)
30	Sudershan Negi	JSI
31	Tanmay Guha Roy	Abt Associates
32	Vithika Yadav	Love Matters
33	Vivek Malhotra	Population Health Services (India) (PHSI)
34	Yogita	Parivar Seva Sanstha

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The views expressed in this publication do not necessarily reflect the views of the United States Agency for International Development or the United States government.

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