

Third meeting of Condom Alliance

## **EXPLORING DIGITAL APPROACHES TO EXPAND THE CONDOM MARKET IN INDIA**

February 6, 2020 | New Delhi

**SUMMARY REPORT**



## SUMMARY OF DISCUSSIONS

The USAID-supported Sustaining Health Outcomes through the Private Sector (SHOPS) Plus project recently organized the third meeting of Condom Alliance, a first-of-its-kind multi-stakeholder group formed to revive the condom market in India. The roundtable meeting was held on February 6, 2020, in New Delhi. More than 50 stakeholders, including many of India's leading condom manufacturers and marketers, donors, implementation agencies, and industry associations, took part in a discussion on the strategic approaches needed to drive growth in the condom category. The meeting also saw participation by senior government officials: Dr. Ajay Khera, Commissioner, Maternal, Child, and Adolescent Health Divisions, and Dr. Sumita Ghosh, Additional Commissioner, Family Planning Division, Ministry of Health and Family Welfare (MoHFW), Government of India.

The roundtable meeting provided the multi-stakeholder group an opportunity to revisit the positive journey the Condom Alliance has charted since it began taking shape in January 2019, when the potential alliance members first met. A second meeting in July 2019 secured consensus on the alliance's structure, functioning, and strategic thrusts in implementing joint activities to generate demand for condoms among youth in urban areas. The goal of reaching India's large and burgeoning youth population not only makes tremendous market sense for private players but also represents an area where they can partner with government to promote the well-being of India's youth. It is on this foundation of consensus, clarity, and shared value that the Condom Alliance met again to examine specific approaches and solutions to trigger demand for condoms among youth. The senior government functionaries present at the meeting congratulated the group for its intent and enthusiasm and reiterated the government's support for Condom Alliance's objectives.

There is recognition — both within the government and the alliance — that effective use of digital media is crucial to reach and engage today's tech savvy youth and must be a major focus of concerted action. The meeting's agenda accordingly had a digital slant, with presentations by Condom Alliance members and partners on the innovative ways digital approaches can enable engaging, credible, and non-preachy communication with youth. Anchor partner

SHOPS Plus shared the nuanced approach its “50 Shades of Ishq” digital campaign is using to influence the audience's decision on condom use through targeted messaging at every step of the decision-making process. The meeting also provided an occasion to demonstrate HelloJubi, the artificial intelligence (AI) based chatbot developed by the project's partner agency, Infinity by Jubi.AI. The chatbot engages youth in a fun way, using interactive questions, cartoons, and guided conversations to create a safe space where youth can access information on family planning and safe sexual behavior.

Conversion of online engagement into intent and ultimately purchase is the final goal of digital marketing, and successful models that have achieved this must be studied and learned from. In this regard, the meeting saw a presentation by Quilt.AI, which has used AI to influence condom purchase intent. SHOPS Plus also used the forum to present insights from its behavioral economics (BE) research that developed, tested, and refined innovative solutions around condom use based on design thinking principles. Prototypes of nine promising solutions to grow the condom market were shared with Condom Alliance members; some members expressed interest in further developing and piloting solutions that aligned with their business needs and plans. Tonic Worldwide, the project's partner agency for digital media, presented several fun concepts and creatives it has planned for future digital campaigns based on insights from the BE research.

Presentations on innovative solutions and digital communication approaches showcased a wide range of ideas the alliance could consider and explore to ignite demand for condoms among youth. This was followed by a more intensive discussion among the Condom Alliance's three sub-committee groups — formed around the themes of 1) creating thought leadership ideas and products, 2) creating new users among the youth, and 3) sustaining the Condom Alliance — on their strategic priorities and planned outputs over the next three to four months (detailed later in the report). As the Condom Alliance's anchor partner, SHOPS Plus underscored its commitment to support the alliance in its collective efforts.

*This report summarizes the meeting's discussions on approaches to bolster demand for condoms among India's urban youth.*



## SHOPS PLUS: HARNESSING PRIVATE SECTOR POTENTIAL, CATALYZING PUBLIC- PRIVATE ENGAGEMENT

SHOPS Plus, a USAID flagship initiative in private sector health, regards strategic partnerships with the private sector, including public private engagement, crucial to reviving India's condom market and equipping the country's large youth population with the information and products they need to secure their safety and sexual well-being. The Condom Alliance represents a resolute step in that direction. India's leading condom manufacturers and marketers, implementers, and donors have come together in this alliance to collaborate for increasing demand for condoms among adolescents and youth in urban areas, where condom use has fallen from 9.8 percent in 2005 to 9.1 percent in 2015 (National Family Health Survey-4).

A shared value collective of key market players and other stakeholders, the Condom Alliance is committed to harnessing the power of collective impact to address market constraints and unlock market potential. The alliance has identified three strategic areas it must focus on: demand generation through category promotion campaigns, especially leveraging digital media; evidence building by co-investing in research and testing of demand generation models; and advocating with the government to address policy-related issues.

The Condom Alliance is of keen interest for donors, including USAID, because greater ownership by private entities and engagement with government on important issues denotes a strong step forward in the journey to self-reliance, where the country addresses important challenges using its own local resources.



# ALIGNMENT WITH NATIONAL HEALTH PRIORITIES ENSURES GOVERNMENT SUPPORT FOR CONDOM ALLIANCE OBJECTIVES

The Condom Alliance's aim of improving condom uptake among youth closely aligns with the government's goal of addressing the existing large unmet need for modern contraceptives. Increasing the usage of modern contraceptives like condoms is prioritized by the Government of India as a critical measure to promote reproductive health, reduce high maternal and child mortality, and provide people the choice to plan their lives and families. The thrust on increasing contraceptive uptake also aligns with the government's commitment to Sustainable Development Goals (SDGs), which place considerable emphasis on securing the health of mothers and children. The Government of India has been implementing several important initiatives to improve mother and child health, but unsafe pregnancies and unwanted births remain a challenge.

The government recognizes that effectively engaging the country's large youth population is a key to addressing this challenge. There is recognition too of digital media being a powerful and efficient medium to reach the youth with information and products for safe sexual behavior. Condoms are a suitable modern method for youth, given the ease of accessing and using the product and the protection it provides not just from unwanted pregnancy but also from sexually transmitted infections and HIV. Crucially, promoting condom use can also help address the issues of male participation and equity in reproductive health and family planning responsibilities, which have so far been disproportionately shouldered by women. The aims and objectives of Condom Alliance, thus, align with the priorities of the government. Further, with private manufacturers and marketers collaborating and engaging with the government, there is a strong potential to go beyond demand-side issues and address supply-side barriers to ensure the product is available, affordable, and easily accessible.



*We would like to be active partners in the aims and efforts of this group. If all the stakeholders join hands to create demand for condoms among youth, we will see a real impact... Given the huge penetration of mobile phones and internet in the country, digital media offers a great opportunity to reach the youth."*



**Dr. Ajay Kherra**  
Commissioner,  
Ministry of Health  
and Family Welfare,  
Government of India



*The Alliance can play a major role in meeting our common objective of addressing sexual and reproductive health needs. Initiatives like chatbot and the behavioral economics study give us insights on how and what the youth thinks... It is important we brand, position, market, and supply condom as a sexual hygiene product and remove the burdensome family planning tag it currently carries."*



**Dr. Sumita Ghosh**  
Additional  
Commissioner,  
Ministry of Health  
and Family Welfare,  
Government of India



*It is heartening to see the interest from corporates and partners in taking the Condom Alliance forward. Continued enthusiasm and support will be crucial to unlock the tremendous shared value this alliance can bring for all stakeholders."*



**Vijay Paulraj**  
Reproductive Health  
and Family Planning  
Advisor, USAID India  
Mission



# BEHAVIORAL ECONOMICS RESEARCH: PEEPING INTO THE MINDS OF THE YOUTH TO IDENTIFY SOLUTIONS THAT WORK

Data and evidence are central to SHOPS Plus' activities and campaigns. The project undertook behavioral economics (BE) research to understand the motivations and barriers in use of condoms (and other contraceptives) by youth. It applied design thinking to develop innovative solutions to address the identified barriers. The BE study, conducted with unmarried youth (18–24 years) in the project cities of Delhi and Bhubaneswar, generated nearly 200 ideas grouped into 11 broad buckets, ranging from “making it easier for women to purchase condoms” to “triggering consent seeking before the sexual act”. Nine of the innovative ideas were shortlisted in consultation with condom manufacturers and marketers for prototyping and were tested with users.

The Condom Alliance meeting provided an opportunity to present insights from the BE solutions' testing to alliance members and other stakeholders present at the meeting. Several BE solutions to ensure easy, discreet access to condoms drew considerable interest. These include service delivery innovations with hotel room aggregators, for example, to provide condoms in customized vanity kits; innovative packaging (decoy chewing gum packs, decoy sanitary pad packs) to make condom purchase less embarrassing for the youth (particularly women); and display of “condom-friendly” status at pharmacies to provide accreditation to chemists and standardize consumer experience of buying condoms. Several marketers expressed interest in these and other ideas and communicated their willingness to further refine and test solutions that aligned with their business needs and plans.



*A deep behavioral economics effort is needed to take this early research effort forward. From the manufacturer's point of view, the feasibility and viability of an idea is most critical.”*



**Ravi Bhatnagar**  
Director External Affairs and Partnerships, Reckitt Benckiser



*The BE research was much needed as the category has been bereft of consumer insights. Needless to say, the research uncovered powerful insights. Anchoring the insights and prototypes into market realities demands more effort going forward. Issues such as price and regulations around co-packaging, etc., will need to be understood and navigated.”*



**Shankar Narayanan**  
Managing Director, Population Services International (PSI) India Pvt. Ltd.



*When it comes to demand generation, we must keep marketing's hierarchy of effects theory firmly in view. It posits that a customer goes through six stages when making a purchasing decision; these stages are awareness, knowledge, liking, preference, conviction, and purchase. From a private manufacturer's perspective, scalability of ideas for demand generation requires a close consideration of the logistics, financial outlay, and profitability such ideas will entail.”*



**Ajay Rawal**  
General Manager - Marketing, Raymond Consumer Care

# REACHING THE YOUTH WHERE THEY ARE: CAPITALIZING ON THE OPPORTUNITIES DIGITAL MEDIA PRESENTS

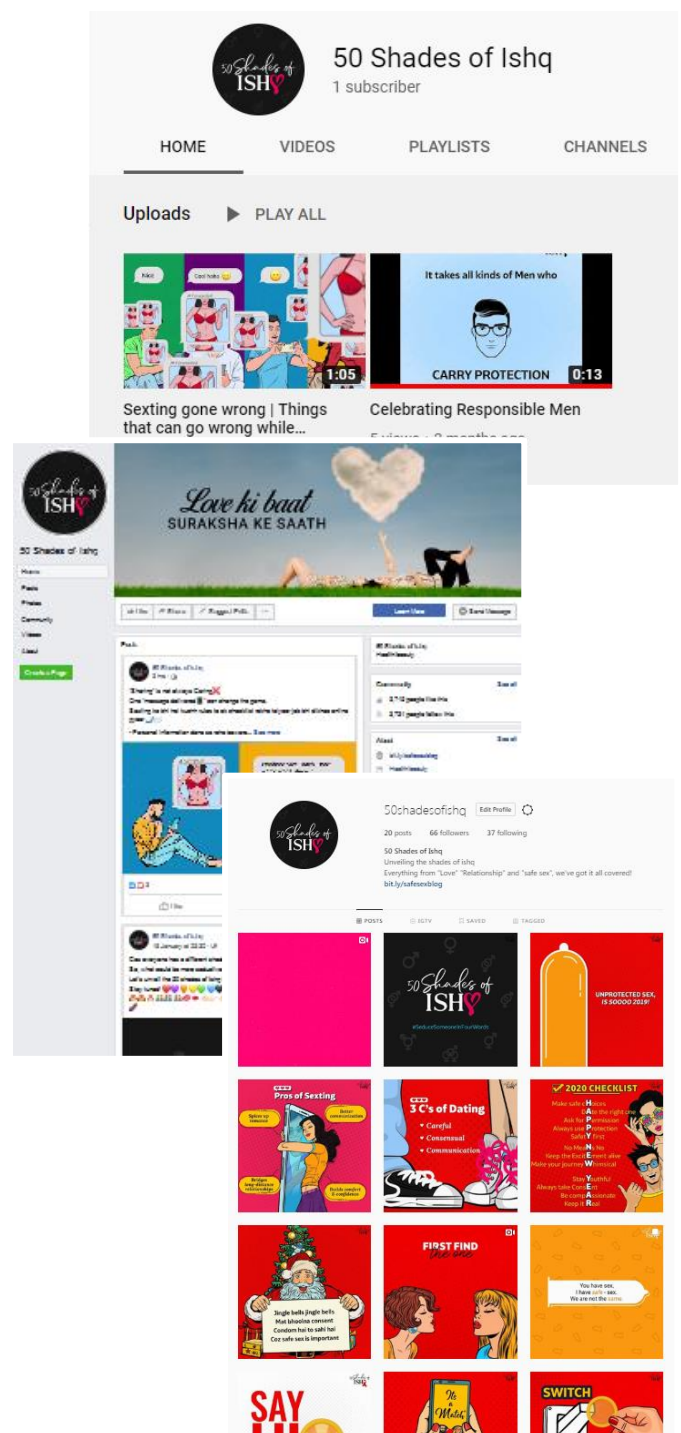
India's large and growing millennial population is tech-savvy and an early adopter of digital media. The Condom Alliance believes it is crucial to leverage digital media to reach the youth on platforms they trust and frequent and speak to them in the language they speak and heed. The Condom Alliance meeting provided SHOPS Plus an opportunity to share its different digital media approaches and innovations with the multi-stakeholder group. The project has demonstrated innovative digital and technology-based approaches to better reach the youth, deepen engagement, and usher them toward adoption of recommended health behaviors and products.

## 50 Shades of Ishq: Digital campaign on safer sexual behaviors

SHOPS Plus is targeting unmarried youth with a digital campaign, titled “50 Shades of Ishq” (meaning, 50 shades of love), on Facebook and Instagram. The campaign is positioned as one that talks about health, relationships, and well-being, emphasizing safe sex as an act of self-love. 50 Shades of Ishq is a brand-neutral space that provides inclusive, non-judgmental, non-preachy, personalized, and localized content on safe sexual practices. The campaign goes beyond just simple information sharing on condoms to deepening and expanding engagement with audiences through content that is provided in easily accessible (mobile phone friendly), shareable, digestible formats (short videos, images, infographics, live videos) that audiences can read, watch, like, comment, share, etc.

50 Shades of Ishq targets each step of the five-step decision-making journey (awareness, interest, engagement, trust, and intent to act) to usher audiences forward in the persuasion funnel from awareness to action. Effective use of real-time analytics allows the project to ascertain where the audience members are in the persuasion funnel. The “intent to act” refers to adoption of safe sexual behaviors and intent to buy condoms through e-commerce channels (which will be operationalized and measured once partnerships with e-commerce partners take shape).

Posts on the 50 Shades of Ishq campaign’s Facebook page have, since January 1, 2020, cumulatively reached 2.12 million people. The campaign’s Instagram page posts have cumulatively reached 1.6 million, with 32 percent post-interaction rate.

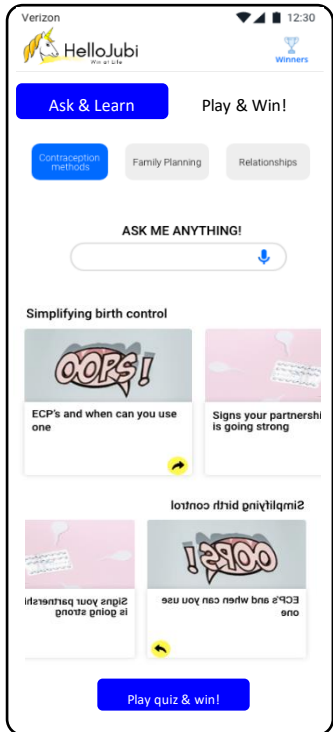
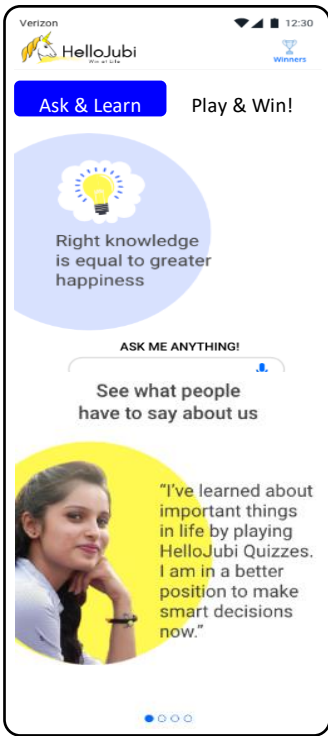


## HelloJubi chatbot: Allowing personalized conversations on safe sexual behavior

SHOPS Plus and its partner Infinity by Jubi.AI have developed and rolled out a chatbot — HelloJubi — to offer information on reproductive health and family planning. The artificial intelligence (AI)-powered chatbot primarily offers a guided conversation flow but also lets users ask their own questions. Available in English and Hindi language, HelloJubi currently has scripted responses for over 200 questions. The chatbot also has a voice-enabled interface, which allows users to ask their questions verbally as well. Using its AI and human-centered design approach, HelloJubi also refers users to the SHOPS Plus family planning helpline for more customized and accurate responses to queries. The integration enables chatbot users to seamlessly speak to helpline counselors to further discuss their doubts.

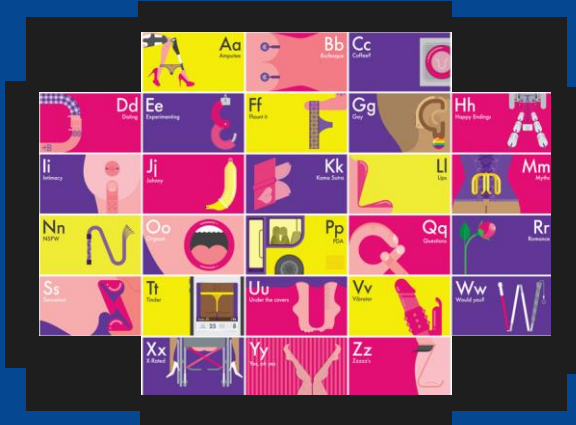
HelloJubi aims to not only educate but also engage, using a gamified approach to conversational quizzing. The quizzes can earn users “Jubis” (reward points) with exciting variable rewards. This feature seeks to create a ‘play’ environment to facilitate learning.

SHOPS Plus unveiled HelloJubi at the Condom Alliance meeting to introduce the powerful technology-driven tool to partners and seek interest in further expanding and sustaining it. The chatbot drew several queries from the meeting's attendees, pointing to the need for continued engagement on this front.



## FUN, EXCITING, ENGAGING

Tonic Worldwide, SHOPS Plus' partner agency for digital media, presented many of the fun concepts and creatives it has planned for future digital campaigns based on insights from the project's BE research. The ideas range from a catchy song "Kaun dumb hai?" (resembling the sound "Condom hai?") to a creative sex dictionary using Hindi alphabets. These concepts to spark consumer interest were presented to Condom Alliance members to secure their support for dissemination, which can not only catch eyeballs for their own brands but also help them fulfill the "purpose" aspect of marketing.





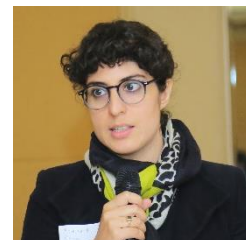
# CULTIVATING A “RESPONSIBLE SEX” MINDSET: THE QUILT.AI CASE STUDY

Conversion of online engagement into intent and ultimately purchase is the ultimate goal of digital marketing, and successful models that have achieved this must be studied and learned from. To this end, the Condom Alliance invited Quilt.AI, a human insights organization, to present a case study on its pioneering work in India in using AI to influence condom purchase intent.

Quilt.AI has demonstrated successful use of human insights and machine learning to drive purchase intent for condoms. It undertook a pilot study with 16 to 19-year-old boys in Rajasthan with the aim of changing the boys' worldview regarding responsible sex practices. The best way of reaching the adolescent boys was meeting them where they already were — on social media platforms. Quilt.AI studied social media signals and search engine trends to make sense of the users. The analysis of social media behavior brought forth individual nudges and natural biases, and some patterns emerged. Using state-of-the-art digital tools, the boys were segmented based on their attitudes toward women, toward sex, etc. Audience segmentation gave insights into the kind of content that would work for different demographics. Quilt.AI used the cues to package and disseminate content to target a diverse range of boys. They then conducted an impact assessment, which showed a positive result: the intervention had increased internet search for condoms by almost two times in Rajasthan. When done well, nuanced marketing can help influence and shape sexual health behaviors.



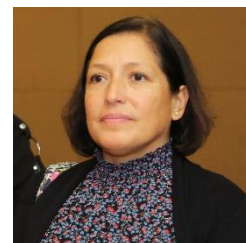
*If we have all come together to make the change, let us do something really aggressive, like taking over the internet real estate in a city for a few days to aggressively push out messaging.”*



**Bushera Boshoff**  
Director of Partnerships,  
Quilt.AI



*There are lots of complementary insights around this table that we should explore and bring together. Perhaps we should set up a working group that brings the insights from the side of consumers and manufacturers together to inform the path ahead.”*



**Caroline Quijada**  
Global Deputy  
Project Director,  
SHOPS Plus project,  
Washington DC







# FROM COMMITMENT TO ACTION: CONDOM ALLIANCE SUB-COMMITTEES PLAN OUTCOMES FOR THE SHORT TERM

The previous meetings of Condom Alliance had seen the multi-stakeholder group identify its three key priorities for the short term and develop sub-committees for each: developing thought leadership ideas and products, creating new users among youth, and creating a sustainability roadmap for the Condom Alliance. At the present meeting, the three sub-committees took part in a breakout session to identify the outputs they would work toward achieving in the next three to four months. The sub-committees brainstormed and deliberated on various ideas and possible outcomes. Key points from the discussion are summarized below.

## SUB-COMMITTEE 1

### Creating thought leadership ideas and products

**Lead:** Ravi Bhatnagar, Director, External Affairs and Partnerships, Reckitt Benckiser

#### Key points of discussion

- Use of AI for hyperlocal delivery of messaging, as demonstrated by Quilt.AI, would be of interest to various stakeholders.
- Condom Alliance could work as a knowledge sharing platform where each stakeholder can benefit from insights and ideas of the other.
- Currently, over-the-top (OTT) media content is not regulated. In this context, partnerships can be forged with media houses, such as ALTBalaji (which owns the Gandhi Baat series), to broadcast the messages/campaigns (on condoms) that might get restricted on TV channels.
- Condom Alliance will emerge as a major thought leader if it is able to get published/featured in prominent international magazines, such as the Time magazine or The Economist. Some members suggested that Indian magazines could be prioritized initially to reach domestic stakeholders and policymakers.
- While most areas have seen emergence of startups, there has been little similar interest in the condom space, owing perhaps to the limited appeal of socially relevant products and services among venture capitalists (VCs). Condom Alliance could seek to plug this gap by, for example, setting up a "Condom Fund" by itself or in collaboration with a VC to foster entrepreneurship in the condom space.
- Condom should be positioned as a 'hygiene product'. One approach could be to do an outreach with organized retailers to reassign condoms from the "male grooming" to the "personal care/hygiene" sections in shops. Condom Alliance could lead this initiative and execute it through retailer associations.
- The alliance could explore possibilities of working with relevant stakeholders to reorient/revise adolescent education modules in schools to ensure that adolescents get sensitized to issues around safe sex.

#### Planned outputs over the next 3–4 months

- Develop a strategic communication plan for each of the Condom Alliance's three target audiences: government, consumers, and marketers.
- Commence execution of the strategic communications plan by publishing articles/op-eds in the domestic media through a public relations/strategic communications agency.
- Identify potential youth ambassadors through influencer mapping in the digital space. Determine the feasibility of approaching these influencers to secure their pro-bono support for campaigns conducted under the auspices of the Condom Alliance. Also identify influencers that are currently engaged by various condom marketers, and check feasibility for pro-bono support to the alliance's campaigns.

### Creating new users among youth

**Lead:** Ajay Rawal, General Manager - Marketing, Raymond Consumer Care

#### Key points of discussion

- Examination of current condom purchase and usage behaviors indicates issues such as condom purchase by the male partner and low awareness about condom's attributes, which can result in a wrong choice of product and spoil the debut experience.
- The interplay between condoms and emergency contraceptives (ECs) must be studied, especially given the high growth ECs have seen in comparison to condoms.
- Women continue to carry the burden of contraception, and this inequity must be addressed. One approach could be to position condoms as a more "proactive" method, compared to ECs that are chosen as a post-coital afterthought.
- All condom category communication should have a two-pronged focus: first, that women insist on use of condoms and second, that use of condom makes men 'cool'.
- Digital media wields tremendous influence on the 18 to 24-year-old population. Influencers from the digital space can be leveraged to promote condom adoption in this population segment.

#### Planned outputs over the next 3–4 months

- Execute a digital campaign under the aegis of Condom Alliance to target the unmarried urban youth in the 18 to 24 years' age group.





### Creating a sustainability roadmap for the Condom Alliance

**Lead:** Anand Sinha, Country Head, David & Lucile Packard Foundation

#### Key points of discussion

- Condom Alliance has a critical role to play and must be sustained. The case for continuing the alliance is strong because the category currently has only a few loosely modeled groups that convene only for specific tasks.
- The marketers would be expected to pitch in to fund the Condom Alliance at some time in future. As the alliance is still relatively new, commercial marketers may be wary of committing their own financial resources just yet. Avenues must, thus, be explored to fund the alliance during this interim period.
- The roadmap for the alliance and the milestones it is expected to achieve in the short- and long-term must be clearly laid out for expectation setting among members.
- Ensuring the neutrality of the Condom Alliance is critical. Once the secretariat of the alliance is set up and the initial teething troubles overcome, the secretariat can be transitioned to a neutral body that recognizes and protects the interests of all stakeholders and has their trust.

#### Planned outputs over the next 3–4 months

- Focus the Condom Alliance on revival of category growth through demand generation while also alongside scouting for funding options to secure the alliance's long-term sustainability; take up issues such as supply-side interventions at a later time.
- Find a donor to sustain the Condom Alliance beyond the term of USAID funding.
- Put in place quantifiable metrics based on the principle of collective impact to ensure that all alliance members have a shared measurement system and undertake mutually reinforcing activities.



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Sustaining Health Outcomes through the Private Sector (SHOPS) Plus is a five-year cooperative agreement (AID0AAA-15-00067) funded by the United States Agency for International Development. The project strategically engages the private sector to improve health outcomes in family planning, HIV, maternal and child health, and other health areas. Abt Associates implements SHOPS Plus in collaboration with the American College of Nurse-Midwives, Avenir Health, Broad Branch Associates, Banyan Global, Insight Health Advisors, Iris Group, Population Services International, and the William Davidson Institute at the University of Michigan.

This brief is made possible by the support of the American people through the United States Agency for International Development (USAID). The contents of the brief are the sole responsibility of Abt Associates and do not necessarily reflect the views of USAID or the United States government.

May 2020