



## 2021 - Condomology Report

Published by the Condom Alliance



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# Foreword

India is a young nation with 600 million young people. More than 50% of its population is below the age of 25 and two thirds of its population is below the age of 35, but to harness this youth power and opportunity, we must ensure their health and well-being. Reproductive health is an integral part of maintaining holistic wellness, especially for the youth, but is rarely given its share of voice. As a society we struggle with high numbers of unintended pregnancies, unsafe abortions and are ranked as the nation with the third highest cases of Human Immunodeficiency Virus (HIV) by the United Nations, which indicates that we have fallen short of bringing forth conversations around safe sex and contraception into mainstream society. Due to that, we end up attributing the emotions of 'shame' not only towards the act but also towards the much-required means of protection - condoms.

The inability to openly discuss sex, creates an unhealthy and awkward environment for the youth and forces them to rely on hearsay information from friends or often misleading videos online. Therefore, leading to myths and misconceptions such as lack of pleasure while using condoms, and the fear of being judged by the chemist as well as one's partner. While the youth might be aware of the existence of condoms, they remain blissfully unaware of the serious repercussions of not using one. In a recent study conducted by USAID

supported Sustaining Health Outcomes through the Private Sector (SHOPS) Plus project which analysed insights on attitudes and behaviours of the youth related to condom use, it was shocking to discover that Sexually Transmitted Infections (STIs) did not prominently feature as a concern for the youth!

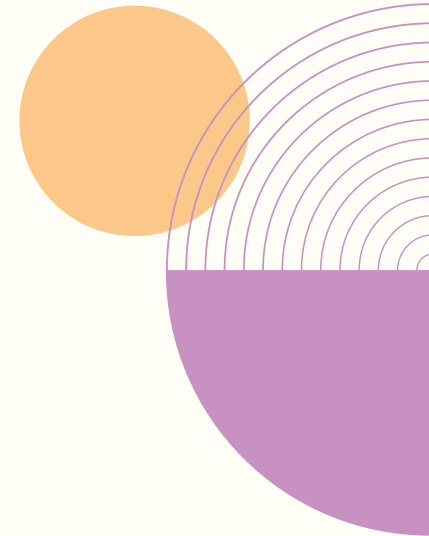
Condom Alliance is a shared value collective of condom market players and other stakeholders to improve the well-being of young people in India. It brings together all the key stakeholders including condom marketers, manufacturers, development partners, donors, and organisations working with the youth to revive the condom market in India by harnessing the power of collective impact to address market constraints and unlock the untapped market potential.

The Condom Alliance's focus on increasing contraceptive use and reviving contraceptive markets aligns with the Government of India's commitment to Family Planning 2020, United Nations (UN) Sustainable Development Goal 3 on ensuring healthy lives and promoting well-being for all, and Goal 17 on revitalizing global partnerships for sustainable development

The report, aptly termed as **Condomology - a term derived from Consumer Condom Psychology**, is a comprehensive

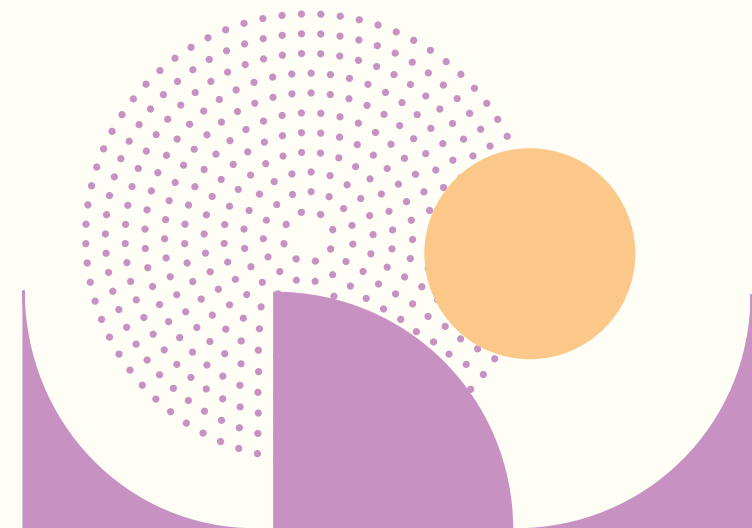
understanding of the consumer psychology and attitude towards the use of condoms, highlighting the misconceptions and other barriers to use. We are heading towards a serious reproductive and sexual health crisis. With the help of the media, the report aims to bring forth the less discussed insights on consumer psychology with regards to condom usage and reach out to the various stakeholders. Hence, urging them to take notice of the situation and take action on an urgent basis to bring conversations around condoms and reproductive health into mainstream society and initiate behaviour change to help society at large.

To bring about a behavioural change, one needs to begin by creating awareness and education that builds intent to use condoms and then facilitating and reinforcing the right behaviour by creating an enabling environment. It is imperative to initiate conversations around safe sex and remove the taboo that looms over this.



# Table of Contents

<b>1.</b>	<b>Are we still high on population and low on condoms?</b>	<b>1</b>
	I. Overview on condom usage in India	1
	II. The Condom market in the country	2
<b>2.</b>	<b>Global Condom usage: Where does India stand?</b>	<b>3</b>
<b>3.</b>	<b>Decoding the mystery of low condom usage in India especially amongst the youth</b>	<b>5</b>
	I. Why do I need a condom?	5
	II. Is using a condom the smart decision?	7
	III. How do I procure a condom?	8
<b>4.</b>	<b>Efforts So Far</b>	<b>10</b>
<b>5.</b>	<b>Making it easier for the youth to make the right choice - use condoms</b>	<b>12</b>
	I. Let's talk about safe sex	12
	II. Empowering the right choice	12
<b>6.</b>	<b>Call of action to all stakeholders - 'The agents of change'</b>	<b>13</b>
	I. Government Bodies	13
	II. Think Tanks	15
	III. Retailers and Condom Marketers	15
	IV. Telecom and Technology Sectors	16
	V. Entertainment Industry	16
	VI. Industry Bodies	16
	VII. Youth Influencers	17
	VIII. Youth Brands in the FMCG, personal care, lifestyle and hospitality sectors	17
<b>7.</b>	<b>Annexure</b>	<b>18</b>
	I. Impact of COVID-19	18



# Are we still high on population and low on condoms?

## Overview on condom usage in India

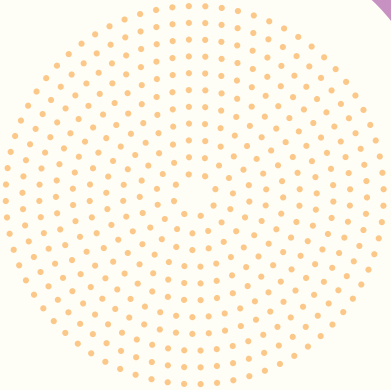
70% of male adolescents between the age of 15-19 and 78% of young male between the age of 20-24 did not use a contraceptive with their last sexual partner - according to the National Family Health Survey - 4 (NFHS - 4) Overall condom usage in India remains extremely low. Despite, the social media boom and apps that have brought casual dating and sex into mainstream society, young people are still hesitant to use contraceptives.

The National Family Planning Programme of India introduced condom as one of the family planning methods in the late 1960s. Condom was promoted as protection both against unintended pregnancies as well as sexually transmitted infections (STIs)<sup>1</sup>. While condom has been promoted as a means for family planning, not much emphasis has been laid

on aligning the messaging to resonate with the youth.

According to a study titled “Condom Use Before Marriage and Its Correlates: Evidence from India”<sup>2</sup> conducted by the Population Council in 2011, only 7% of young women and 27% of young men had ever used condoms in premarital sex. Only 3% and 13%, respectively, always used a condom.

Despite being ranked as the nation with the 3rd highest cases of HIV by the UN and witnessing over 101,000 unintended pregnancies in 2020<sup>3</sup>, condom usage remains alarmingly low. We are heading towards a serious reproductive and sexual health crisis. Urgent attention and action is imperative to avert this crisis.



**“According to the National Family Health Survey (NFHS) - 4, around 78 percent of Indian men between ages 20-24 did not use a contraceptive with their last sexual partner. India is a young nation with the median age expected to be 28 by 2022<sup>4</sup>. Hence making it imperative to reach out to the youth in schools and colleges through adolescent health education programmes that focus on holistic health including sexual and reproductive health.”**

**Ravi Bhatnagar,**  
Founding Member, Condom Alliance,  
Director of External Affairs and Partnerships in Asia, the  
Middle East, and South Africa, Reckitt

<sup>1</sup> Acceptability of male condom: An Indian scenario: Indian Journal of Medical Research; November 2014 - <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC4345747/>

<sup>2</sup> Condom Use Before Marriage and Its Correlates: Evidence from India: The Population Council of India, 2011

<sup>3</sup> FP2020 Core Indicator Summary Sheet: 2019-2020 Annual Progress Report

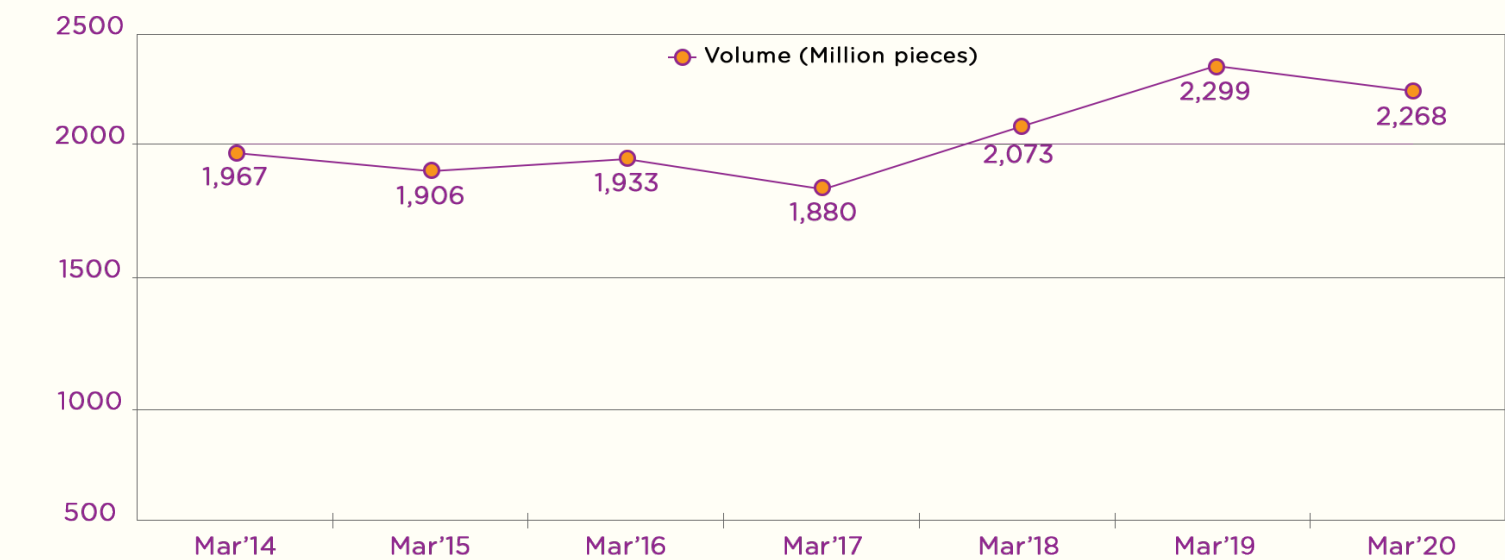
<sup>4</sup> <https://www.thehindu.com/opinion/lead/youth-can-be-a-clear-advantage-for-india/article30897179.ece#:~:text=India's%20population%20is%20among%20the,its%20non%2Dworking%20age%20population>

## The condom market in India

Despite campaigns led by government bodies and other institutions to encourage the use of contraceptives, the condom market has only witnessed a 2% CAGR in volume, over the past 6 years.

- The moving annual total (MAT) in March 2020 for the priced condom market size was calculated at 2.3 billion pieces, valued at Rs. 1521 crores. While the condom market value has shown steady growth from 2014 onwards, sales volumes dipped last year. In volume terms, the market grew 11% (year on year) in 2019, but decreased 1% in 2020. The Market value during the same periods grew 17% and 5% respectively. The growth in condom markets over the last year has come largely from the non-metro urban markets<sup>5</sup>.
- Urban areas account for 65% of the volume and 72% of the value. While metro and rural areas don't differ greatly in value contribution, rural areas contribute considerably more to the sales volumes.
- Based on the data from NFHS -4, 12.9% of currently married women have unmet need with regards to contraceptives. When one applies the Couple Years of Protection (CYP) for condoms, it projects a potential untapped market size of 4.1 billion pieces annually.
- Commercial enterprises contribute 67% of the volume and 86% of the value of the condom market. Manforce (Mankind) is the leader in both volume and value terms, with Kama Sutra (Raymond) a distant second.

### Market trends for condom usage in India



- The market shows a compound annual growth rate (CAGR) of 2% in volume terms

Data Source: IQVIA Retail Sales Audit, 2014-2016, MAT Mar 2020

**“Condom usage in India is almost 1/6th the size of various other major economies in the world. Given the sheer size of our population, notably as the nation with the largest youth population there is a need to accelerate efforts to remove barriers, especially psychological barriers, impacting condom usage. A combination of efforts aimed at improving the accessibility of condoms and addressing the barriers around condom procurement can play a pivotal role in greater adoption of this category among the youth in the country<sup>6</sup>.”**

**Brij Balaji Singh,**  
Member, Condom Alliance,  
Senior Vice President, Operations, TTK Protective Devices Limited – TTK HealthCare Ltd.

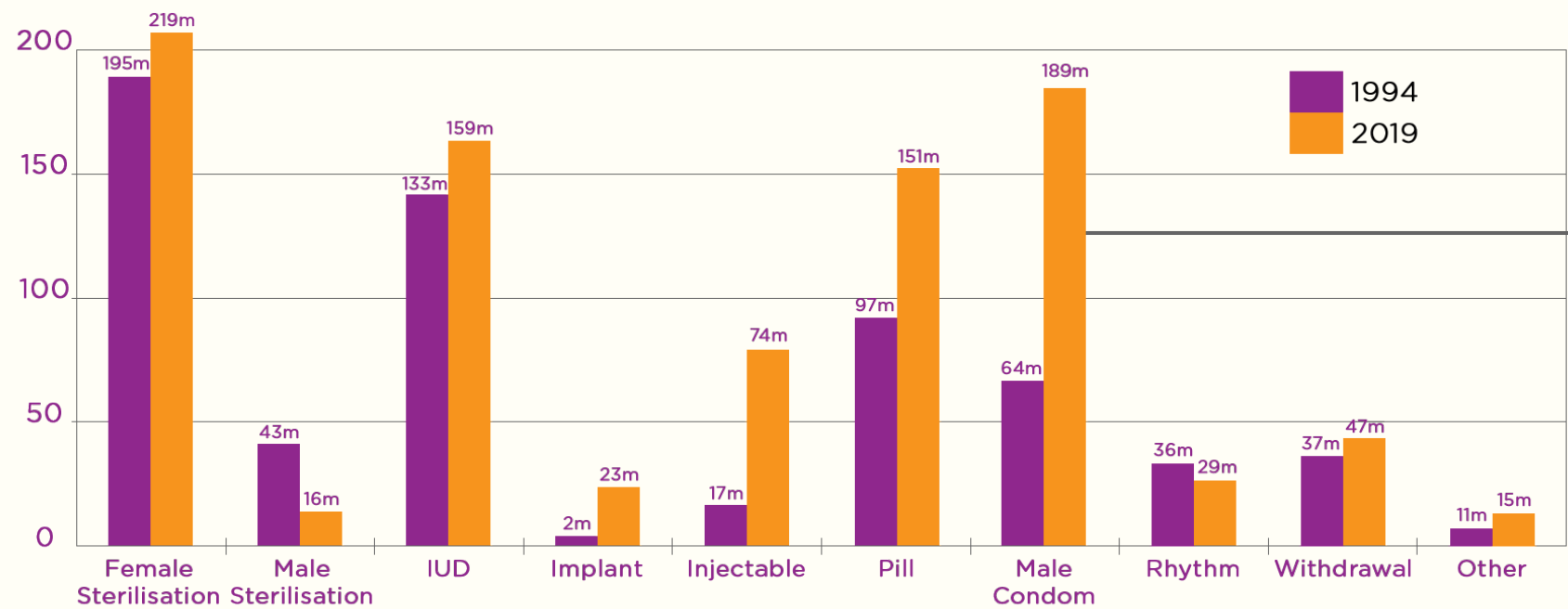
<sup>5</sup> IQVIA Retail Sales Audit, MAT Mar 2020

<sup>6</sup> <https://www.capitalmind.in/2020/05/ttk-healthcare-keeping-skore-in-the-indian-condoms-segment/>

# Global condom usage: Where does India stand?

Globally, the number of women relying on male condoms, increased from 64 million to 189 million, from 1994 to 2019.

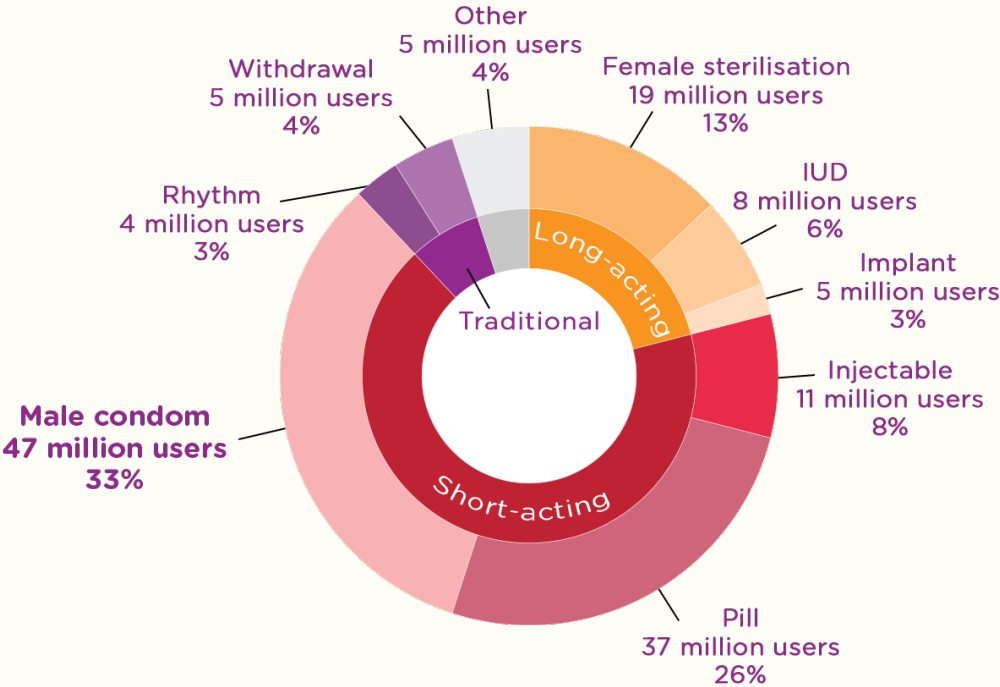
Estimated numbers of women of reproductive age (15-49 years) using various contraceptive methods, 1994 and 2019



Globally, the number of women relying on male condoms, increased from 64 million to 189 million, from 1994 to 2019

Data Source: Calculations are based on data compilation, World Contraceptive use 2019, additional tabulations derived from micro-data sets and survey reports and estimates of contraceptive prevalence for 2019 from Estimates and Projections of Family Planning Indicators 2019: Population-weighted aggregates

Estimated numbers of women of reproductive age (15-49 years) using various contraceptive methods, by marital status, 2019



- According to a UN survey amongst 33% of 143 million unmarried women from across the world, condoms emerged as the preferred contraceptive method at 33%

Data Source: Contraceptive Use by Method 2019, United Nations, Department of Economics and Social Affairs

Condoms emerged as the preferred contraceptive method for 33% of the 143 million unmarried women who participated in a recent UN survey<sup>7</sup>.

Though over the past few years, there has been substantial increase in the use of contraceptive methods in India, there remains a lot of ground to cover. Unlike the rest of the world, condom usage remains extremely low at 5.6% based on the NFHS 4.

The global data highlights the cultural and societal differences between the Indian youth and the western counterparts with regards to sex and contraceptives. The taboo that exists in India around sex and any conversation related to it, does not exist in the more liberal western countries. Hence, the youth in those countries do not face the primary barrier - the fear of shame, with regards to use or procurement of condoms. Unlike the Indian youth, those in developed western countries walk through the aisles of popular super markets, pick up condoms, and place them before the cashier, without the fear of any judgment, glares or whispers. They view condom as any other product on the grocery list, are comfortable discussing about sex and protection with friends and family and both genders feel equally empowered to use condoms. Besides, unlike the youth in the developed western nations who typically move out of their parent's home by the age of 18, the Indian youth is more likely to be staying with parents, adding to the challenge of procuring and storing condoms.

*“There is an urgent need to address the underlying need of improving reproductive wellbeing of the nation’s youth. One cannot deny the economic impact of teenage pregnancies on a nation’s economic standing. The lifetime opportunity costs of adolescent pregnancy—a measure of the annual income adolescent mothers forgo over their lifetime— range from 1% of annual gross domestic product (GDP) in a large country, such as China, to 30% of annual GDP in a smaller economy such as Uganda. If adolescent girls in countries such as India were able to wait until their early twenties to have children, the increased economic productivity would equal more than US\$3.5 billion and US\$7.7 billion, respectively<sup>8</sup>.”*

**Vithika Yadav,**  
Member, Condom Alliance,  
Head, Love Matters

<sup>7</sup> Contraceptive Use by Method 2019, United Nations, Department of Economics and Social Affairs

<sup>8</sup> <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC4982245/>



# Decoding the mystery of low condom usage in India especially amongst the youth

Despite the invasion of casual dating apps such as Tinder and Grindr, consumption patterns haven't moved in the same ratio as the number of (right)swipes.

## “Why do I really need a condom?”

“I have done it only twice without a condom but nothing happened, she got her periods on time! So, I guess it's ok!”

—Vikas, 20, college student

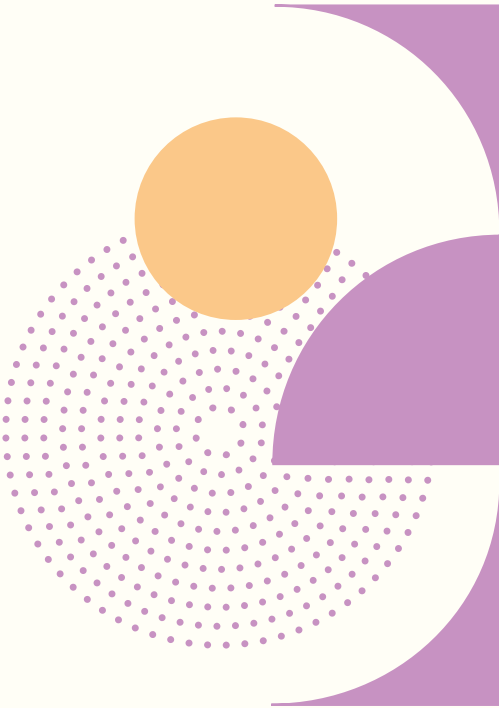
“If you have done it 2-3 times without it and went through ok, you get the courage to do it again! I didn't even have an I-pill.”

—Sapna, 23, BPO executive

“My boyfriend was into oral sex but I was uncomfortable about the after-taste, he suggested flavoured condoms and we both ended up enjoying the experience.”

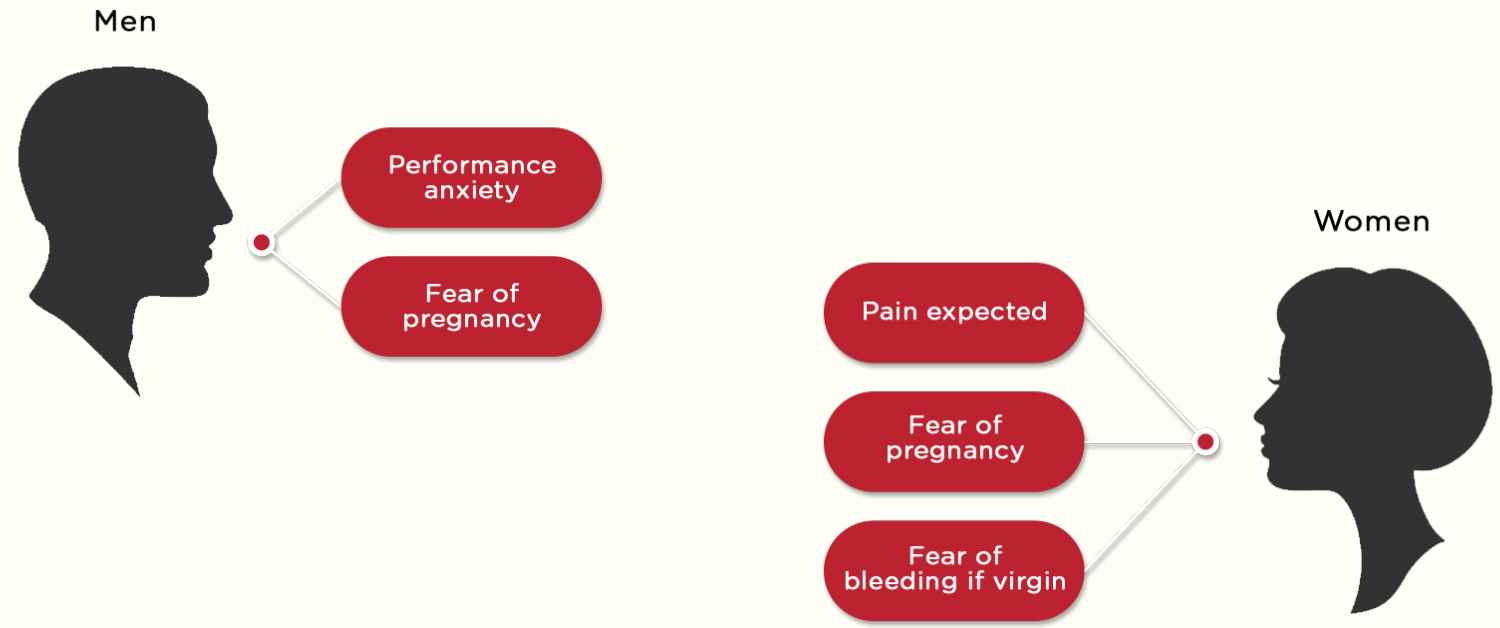
—Rashmi, 22, sales executive

- There are studies that suggest that the first experience often sets the tone for future sexual encounters. According to the Global Sex survey: India by Durex, condoms are the most common contraceptive when losing virginity, especially amongst the youth, but only half of them seem to be using it on the occasion.
- Flavoured condoms can create an incentive to use a condom as the flavours sound exciting, and even make oral sex more pleasurable by addressing the fear of displeasing smell or taste.
- When thinking about sexual intercourse, there is extremely low awareness on sexual health with condoms not prioritized as a means of protection against STDs and STIs. When asked about their fears regarding sex the following were the key responses offered<sup>9</sup>.



<sup>9</sup> Increasing Condom Adoption Among Youth, Insights from SHOPS Plus India, 2020

Key fears regarding sex among men and women



Data Source: Increasing Condom Adoption Among Youth, Insights from SHOPS Plus India, 2020

- Awareness of STDs/STIs was limited to HIV/AIDS and contracting an STD not considered a tangible risk.
- According to the Global Sex Survey : India, by Durex, for most participants protection from pregnancy was a significant concern. While 46% used condoms as a protection from both STIs/STDs and pregnancy, 37% used it as a protection against pregnancy only as opposed to a mere 13% who used it as a protection against STIs/STDs only. Thus, further corroborating that there is a lack of awareness as well as a general sense of misconception amongst the youth that they would not be impacted by the disease.

“In college I used to think that if we will do sex with more than 2-3 partners then I will get AIDS.”

—Sanjay, 24, BPO executive

“People who are in casual relationships have a mutual understanding so chances of STD is less, the girls I got physical were not of that type. If you visit a brothel you have to wear a condom but if you are doing it with your partner you will obviously know their past sexual experience.”

—Piyush, 25, sales assistant at an auto dealership

## “Is using a condom the right decision?”

“I mostly have a condom in my wallet but I don’t take it out until she asks if I have it, then I pretend to go out and bring it. She might judge me, consider me a playboy if I pull it out without asking.”

—Vijay, 25, customer service executive, real estate

- Some men and women refrain from using it even if they might be carrying one as they fear being seen as promiscuous. This is especially true in the case of women. They fear being labeled as ‘loose’.
- Most men have the misconception that using a condom reduces physical pleasure.
- Many fear that using a condom breaks the flow of the moment, reducing the excitement and thrill of the experience.
- First-time users fear they might fumble while using and fear being judged by the partner as well as losing the momentum.

“It was his birthday, he booked a hotel room so we could spend time, and I did not know it will happen, so I took an I-pill later.”

—Kavita, 19, college student

- A lot of women feel that the onus of using the condom lies with their partner and often lack the confidence to ask their partners to use a condom. As mentioned earlier, communication around the act reinforces a sense of awkwardness, forcing most couples to avoid a vital conversation expressing desires and determining boundaries before indulging in a sexual act with mutual consent. For a lot of women, the act was a spontaneous decision, without allowing them time to plan contraceptives or contemplate the use of condoms.
- Fear of being discovered as sexually active and blackmailed due to unsafe condom disposal serves as another key deterrent.

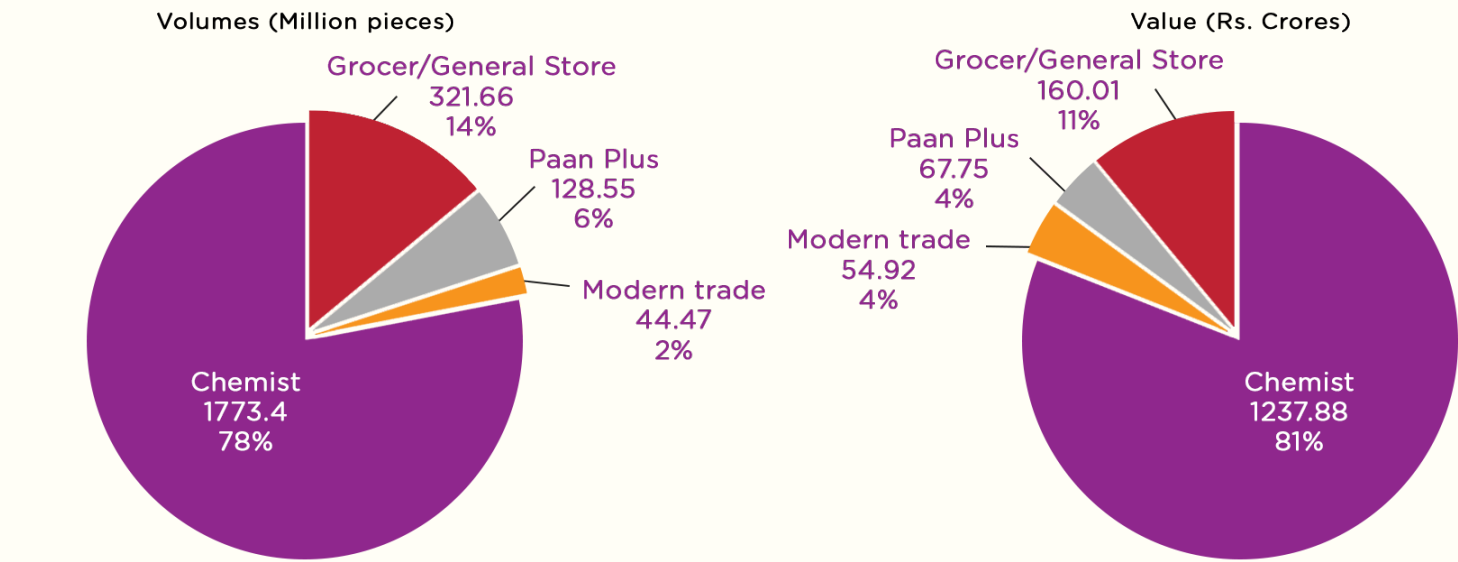
“How do I procure a condom?”

“How can I buy condoms?  
They even wrap sanitary pads in paper and black polythene and give it, if I buy condoms, everyone will know and my family will find out.”

—Kavita, 19, college student

- The onus to procure the condom typically rests with men, rendering half the population indulging in the act virtually with little or no power to control condom usage.
- In western countries one can easily pick up a pack of condoms from a supermarket and walk out without feeling judged. In India chemists contribute 78% of the volume and 81% of the value of market for condoms and Grocers/General Stores is a distant number two with 14% volume and 11% value share<sup>10</sup>.

Analysing barriers to procuring condoms:  
A look at national market share by trade channels

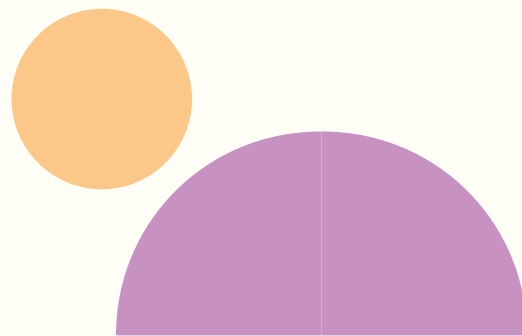
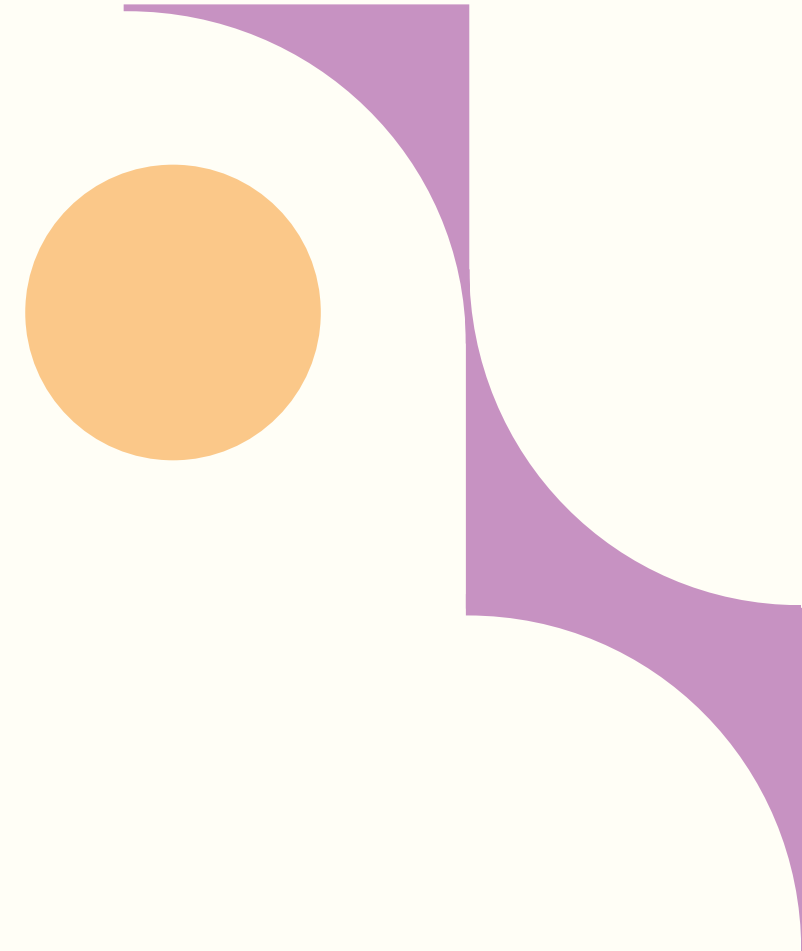


- Chemists contribute 78% of the volume and 81% of the value of market for condoms
- Grocers/General Stores is a distant number two with 14% volume and 11% value share

Data Source: IQVIA Retail Sales Audit, MAT Mar 2020

<sup>10</sup> IQVIA Retail Sales Audit, MAT Mar 2020

- Thus, the process of buying involves one on one interaction and the societal mindset adds to the discomfort of the buyer as he feels judged by the retailer and those around him at the sale counter. The process gets exponentially more uncomfortable and daunting for a young woman trying to buy a pack of male or female condoms.
- There is a lack of awareness about what condom to buy. While there are multiple brands and varieties available, most advertisements focus on creating bold sensual imagery, instead of offering a clear understanding of the product differentiation offered or the value add. The first-time buyer is already embarrassed to ask for the condom at a chemist's shop, and the task of figuring out the condom with the preferred attributes from the packaging that carries sensual imagery, makes the entire process unnecessarily daunting and avoidable. Thus, the buyer is left at the mercy of the pharmacist and quietly purchases whatever product variant is slipped in his shopping bag. Buying the wrong kind of condom can also create an unpleasant experience and discourage repeat use.
- Young couples in India unlike their western counterparts, continue to live with their parents. Hence, buying and storing condoms before-hand, creates the risk of being caught by parents and facing an awkward situation.



## Efforts So Far

The Bill and Melinda Gates Foundation launched Avahan, an initiative to reduce the spread of HIV in India in 2003. Condom distribution served as an integral intervention element. The expanding HIV education and services, led to an increase of 11 million in condoms distributed and sold during the time period of 2004-2008. The initiative included:

- Prevention package for men at risk.
- Enhanced distribution and social marketing of condoms, complemented by mass media campaigns to promote condom use.
- Behaviour change communication activities, both interpersonal and through mass media.
- STI treatment through either clinical service provided at truck stops or a franchised network of private treatment providers.

In 2004, West Bengal State AIDS Control and Prevention Society, the state arm of National AIDS Control Organisation, commemorated the World AIDS Day by launching a mass media campaign, which targeted women in monogamous, heterosexual relationships with a cheery, jhola -carrying, stuffed doll, as the mascot – Bula-di. Popularly known as the Bula-di campaign, it aimed at educating women and through them tried to generate awareness among men about the disease and other related issues. Both conceptually and visually, Bula-di invaded the private space in people's lives. She confidently spoke about condom use and safe sex in the public domain and attempted to blur the rigid divisions between private and public. Through messages such as 'have

fun responsibly'; 'always carry a condom'; 'protected sex is best sex' etc. she tried to break the culture of silence that surrounds sexuality and make it commonplace.

'Condom is Just Another Word' launched in 2007 by India's National AIDS Control Organisation (NACO) reached 150 million men across India between 2007 and 2009 through public service advertising. The aim was to get men talking about condoms. Through a catchy phrase coupled with creative TV and radio advertisements, ringtones as well as a popular mascot, the campaign had managed to increase condom conversations among men and reduced the embarrassment related to purchasing condoms.

The 'Will Balbir Pasha Get AIDS?' campaign was created by Population Services International (PSI), India as a part of its Operation Lighthouse, an HIV/AIDS prevention programme. The programme aimed to reduce rates of unsafe sex by motivating people to consistently use condoms, call the confidential HIV/AIDS hotline, and use the Voluntary Counseling and Treatment services. The campaign was built around a fictional character called Balbir Pasha. It used a storyboard to place him in various high-risk sexual situations, with unknown outcomes. With a catchy tag line and a mixture of outdoor communications, print, television and radio messaging, the campaign succeeded in capturing attention and bringing conversations around of HIV into mainstream society.

'Condom Bindaas Bol' created in 2007 to make condoms

accessible as the result of a joint effort of PSP-One, a United States Agency for International Development (USAID) project, the Indian Government's Ministry of Health & Family Welfare and ICICI Bank. It used two messages: that "condom" is not a delicate word and it should be discussed freely, and that condoms should be used by everyone, and not just by people in high-risk groups.

HLL installed 11,025 Condom Vending Machines (CVMs) in 10 states under a national programme in Phase I in 2005-07. The CVMs provide anytime access to quality condoms in a non-embarrassing situation. Unfortunately, the program could not continue post the second phase, due to operational concerns. It was considered a bit futuristic for 2005, with regards to consumer awareness and acceptance for the unique model.

Reckitt, under its flagship Dettol 'Banega Swasth India' in partnership with ADRA India (Adventist Development and Relief Agency) India and Love Matters, India, has recently launched a unique life skills program for kids, "The Birds and Bees Talk" (BBT) in 2020. It is the first-of-its-kind life skills curriculum in India for adolescents aged 10-14 and 15-19. This two-part curriculum consists of a total of 27 lessons plans about growing up, sexuality education and life skills. The curriculum uses the Comprehensive Approach to Sexuality Education which recognises the agency and rights of young people to make their own informed decisions. It acknowledges that young people may or may not engage in sexual behaviour and sexual activity, and thus strives to provide adequate information regarding safer sex practices.

The curriculum aligns with UNESCO's International Technical Guidance on Sexuality Education (ITGSE) 2009 and the current National Curriculum Framework (NCF), by focusing on connecting knowledge and awareness to life outside the school. It prepares students to live a healthy, happy and well-rounded life. The comprehensive growing life skills curriculum launched in North East India provides accurate, fact-based and age-appropriate information that will help the youth make informed choices.

Condom marketers have been making consistent efforts to build awareness regarding the need for condoms. Besides collaborating with government agencies to distribute free condoms, TTK has hosted two international conferences, IS, in Chennai for condom standard regularization. It has hosted an AIDS awareness exhibition at the TTK factory at Virhunagar to educate about the disease and the manner in which it spreads. TTK has also hosted roadshows to build awareness for AIDS and sexually transmitted diseases. These were performed on highways, at places where the truck drivers would typically halt for a break. Free condoms were distributed as well as part of the road show.

KamaSutra, a brand of Raymond Consumer, recalibrated its communication to show condoms as active choices of both the partners. This is to break the taboo and inhibitions associated with the condoms between couples. In a more recent communication done by KamaSutra for its variant – Orgasmax, a couple are shown as shoppers and interacting with the chemist. It is path breaking in the way it tries to encourage open conversation by users in the shopper context. Orgasmax variant itself was the first ever condom crafted for pleasure of both the partners – an attempt to democratize

the pleasure conversation between couples.

Durex with its campaign #OrgasmInequality strove to build awareness for orgasm equality across all genders. Through its survey, Durex highlighted that nearly 70% of the women do not experience orgasm. Mutual Climax condoms by Durex, launched as part of the campaign #ComeTogether, aims to create awareness on the issue of orgasm inequality, thereby encouraging couples to have a discussion on the issue. Mutual Climax was launched with the intent to empower couples and achieve equal pleasure and sexual equality.

Durex launched Jeans, a new condom brand in a new pack that fits well in a body-hugging denim pocket. It targets the upwardly mobile, digital savvy population who swipe left and right on Tinder for dating, and have an active sexual life. Through this variant, the brand aims to address the taboo associated with buying and carrying condoms through messaging such as - A pair of Jeans, you cannot do without #DurexJeans. The concept builds on the tagline promoted by the Indian government 'chalo condom ke saath (walk around with a condom)'.

Masti condoms by PSI, India Private Limited, recently launched its new campaign showcasing the Masti man. The brand steers away from the erotic route followed by most condom advertisements to create a campaign that resonates with couples in a progressive relationship. The Masti Man is an 'all-rounder' who succeeds at work, fulfills his responsibilities at home and believes in equal agency for his partner. Using a popular theme and language of cricket, Masti through its campaign projects the all-rounder Masti Man as no less than a 'Man of the Match' for his partner.

In February 2021 Condom Alliance launched "Kaun Dumb Hai" - a new age campaign directed toward youth. Through a witty video the campaign urges the youth to not be 'dumb' by believing the myths and misconceptions that surround the use of condom and instead to identify themselves as smart and use a condom. The campaign "Kaun Dumb Hai", which translates into the term - who is dumb, uses a slogan that sounds like 'Do you have a condom?'. It describes typical times when a condom should be used and lists the myths that often deter couples from using one. The lyrics of the song simultaneously associate the use of condoms with positive attributes such as being smart, trendy and responsible, to encourage the youth to dispel negative notions about condoms and make the effort to use a condom for the sake of their partner as well as their own reproductive health.

The campaign was also rolled out on '50 Shades of Ishq' Facebook and Instagram handles and shared with key influencers to enhance reach. The three month-long campaign included a series of digital content including a dance challenge. While the campaign video garnered over a million views the dance challenge received 2.1 million views on Instagram reels.

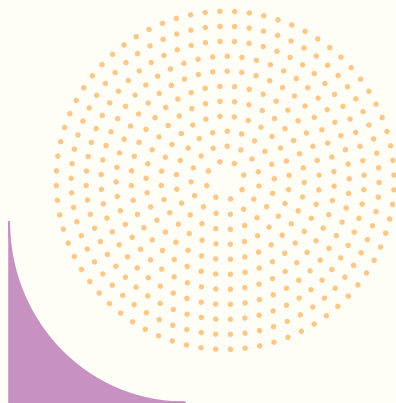
Efforts made in the past have been commendable but there still remains much ground to cover.



## Making it Easier for the Youth to Make the Right Choice – *Use Condoms*

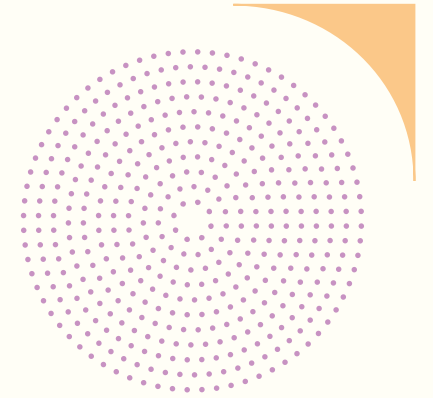
### Let's talk about ***SAFE SEX***

- Unlike other key decisions of their lives such as career choices or even the right kind of jeans to buy, they rarely have any guidance on probably one of the most important decisions of their lives that could have an irreversible effect on their health as well as their future. There is a need for guidance from people they trust and through mediums that they can easily access. According to the Global Sex Survey : India, by Durex, 75% of 18-24 year olds agree they need more information on safety, privacy and consent. The internet and friends serve as the key sources of education and information with 36% of them getting the information from pornography further leading to misconceptions and unrealistic expectations.
- The sexual wellness industry is expected to be worth INR 10,000 crore based on an India sex survey by That's Personal. The growth is expected from the Tier 2 cities. 22% of these buyers of sex products are 18-24 and 44% of them are 25-34 year-old. Thus, the youth in the country are curious and sexually active, but lack the guidance necessary to enjoy a safe and healthy experience.



### Empowering ***THE RIGHT CHOICE***

- Awareness of the need for safe sex and its health implications, empowers the youth to make the right choice. Most often women leave the onus of using condom on their partner, and are unsure if they can ask their partner to use protection fearing they might be judged. Thus, making women aware of their right to experience safe sex and empowering them to ask their partners to use protection is an integral step towards creating a more equal society while encouraging the use of condoms.
- According to India sex survey by That's Personal, 38% of sex product buyers are women. Cities such as Baroda, Pune and Thiruvananthapuram have more women buyers than men. However, there is still the hesitation in asking their partners to use condoms.
- Additionally, it is important for men to also realise their responsibility towards their partner and their collective physical and emotional health. Unlike other contraceptives, male condoms include a larger participation from the male partner, thus the right education on safe sex and the use of condoms, will empower men to make the more responsible choice as well.





## Call of action to all stakeholders - 'The agents of change'



### Government Bodies

Wide spread sex education will empower the youth to make right choices. Government of India has recognized the importance of influencing health-seeking behaviour of adolescents through Rashtriya Kishor Swasthya Karyakram program. It recognises that adolescent often do not have the autonomy or the agency to make their own decision. While the focus is on reorganising the existing public health system in order to meet the service needs of adolescents, it will be important to provide comprehensive sexuality education to all adolescents since the health situation of this age group is a key determinant of India's overall health, mortality, morbidity and population growth scenario.

■ The national government in early 2021 has rolled out a 'Health & Wellness Curriculum' that includes topics such as reproductive health and prevention of HIV. While the intent is definitely commendable, the success lies in the ability to execute the program at scale in all schools in its true spirit of building awareness and ensuring sustainable development for the youth.<sup>11</sup>

- According to the Global Sex Survey: India by Durex, those who had received sex education were more likely to use condoms as opposed to those who had not received sex education.

■ Making condoms more visible and increasing access will encourage conversations and challenge misinformation about condoms and encourage condom uptake. Learnings from similar categories previously considered as taboo such as sanitary napkins need to be reviewed to adopt best practices.

- For instance, sanitary napkin advertisements carry a very clear message of what they need to be used for and why they need to be used as well as the features that make the particular napkin ideal for use based on occasion and desired impact. There is no ambiguity, no underlying coyness or hesitation in the messaging or the visuals. These advertisements are shown at all times, including prime time slots on television. Thus, systematically and gradually taking away any 'shame' attributed to the product or menstruation.
- A similar approach led by the government towards condoms would help bring the conversations around condoms to mainstream, doing away with the myths and misconceptions associated with it. It would also take away the societal judgement associated with using condom as a contraceptive.

■ Review the price ceiling and consider building a free market

- Between the government price ceiling and the retailer margins, the commercial manufacturers are not left with much financial incentive to innovate, build the market and invest in bringing about a large-scale behaviour change
- The government is offering free and subsidised condoms, despite that and the price ceiling, the condom usage remains low. Therefore, price might not be a significant deterrent to condom usage. There is merit in creating a free market model for commercial manufacturers to allow the marketers to add more users to the market through capital intensive innovations, research and development, as well as educational marketing campaigns to encourage behaviour change.

<sup>11</sup> <https://theprint.in/india/education/sex-education-breaking-gender-stereotypes-in-modi-govts-new-school-curriculum/367475/>



## Government Bodies

- Adopt the PPP model
  - Public private partnership models could combine the reach and distribution of public bodies with production and marketing expertise of the private companies to create compelling campaigns that resonate with the lifestyle, aspirations and desired values of today's youth, in order to build relevance and ensure maximum social impact.
  - Building insightful and educational campaigns that stress on the implications of unsafe sex such as unplanned pregnancies and life threatening STIs and bringing these concerns into mainstream communication platforms will help drive conversations and empower the youth to make informed decisions. The fear of being judged no longer discourages women from asking the chemist for a sanitary napkin!
- Rethink the broadcast restrictions on airing condom advertisements between 6am to 10pm
  - Bring condoms into mainstream conversation by removing restrictions regarding broadcasting timing of condom related media content.
  - Advertising Standards Council of India (ASCI) should create a clear set of guidelines that are industry agnostic and intently monitor the same.
  - Marketers also need to be cognizant of the content. The marketers tried to widen the scope of condom promotion beyond the prevalent messaging around family planning and target the youth by building messaging around their sexual aspirations. While it is important to address the concerns and build appeal amongst the youth, it is also imperative to stay true to the product and its value as a contraceptive for better reproductive and sexual health. The messaging must help build a better understanding of the category rather than build a superficial imagery that starts defining the category.
  - Broadcasting condom advertisements and other campaign led informative videos that follow the guidelines created by ASCI during prime time would bring conversations about sexual and reproductive health out of the shadow of obscurity and shame and encourage dialogue.

***“While factors such as fear of being judged, myths or misconceptions around condom usage feature as key barriers, dissuading condom adoption in our country, the price of a condom is certainly not one of them. Since the government is already offering free and subsidised condoms, allowing the commercial manufacturers to operate within a free-market model would allow room for innovation and larger budget spends on building awareness to encourage long term behaviour change.”***

**Amit Kumar Taneja,**  
*Independent Consultant and Former Social Marketer*

## Think Tanks



- Think Tanks must champion the cause of improving the reproductive health of the youth and highlight its importance to achieve the nation's Sustainable Development Goals.
- They need to act as agents of change through key insights and actionable recommendations to relevant government bodies in order to initiate conversations and influence policy changes to bring about a large-scale behavioral change in society.

## Retailers and Condom Marketers



- Sensitize retailers to better handle condom related queries in partnership with Chemists and Druggists Association
  - Condom marketers can help create and conduct workshops on sensitivity.
  - Provide ease of access for condom purchase irrespective of time of the day. Evolve strategic and tactical plans to make condom purchase an independent task to tackle shame associated with it.
- Campaigns and media content that is fun engaging and yet informative and appropriate, rather than focus on hyper-sexualisation and objectification.
  - While a lot of different variants of condoms are available, most of the advertisements around them have a similar bold theme with an underlying sensual vibe, which neither talks about the need for protection nor its benefits other than sexual pleasure. Thus, leading to an awkward silence when these advertisements appear amidst a family setting and further strengthening the social taboo associated with conversations around sex or condoms. It fuels the unwarranted shame associated with buying

or carrying condoms. Given the content, the government allows only late-night broadcast of these advertisements as they are not considered appropriate for family time viewership.

- There is a need to relook at the content of these advertisements. While lack of pleasure is a general misconception that needs to be addressed, it is equally important if not more to create more educational content that actually talks about why a condom is needed and how the particular variant of the condom would benefit the users, akin to the advertisements of sanitary napkins or other similar personal health and hygiene products. Further talking about power dynamics in a relationship given the need to navigate consent and negotiate condom issues, in a manner that doesn't reinforce patriarchy or male entitlement, would encourage progressive young people to adopt condoms responsibly and facilitate change in social norms.
- The messaging should help steer societal conversation on condom purchase as a being responsible rather than focus on the sex. Thus, changing societal mindset by presenting a condom user as being responsible towards his or her partner and family. There should be a societal acknowledgement for the responsible action taken by a condom shopper.

***"There is an urgent need to establish, strengthen, and sustain the collaboration between condom manufacturers, marketers, government, and other actors to increase demand for condoms to ensure reproductive wellbeing of India's youth. A host of brand marketers in India are involved in periodic research studies to gather relevant insights centered on the barriers of category adoption and triggers for trials. We strongly believe that there is a need to equip probable consumers at every stage of their journey, right from awareness till the use through normalizing condom conversation, educating about safe and responsible sex without compromising on pleasure, easing the journey of discovery for a new (1st/2nd/3rd time) user and lastly by easing the shopper transaction."***

**Ajay Rawal,**  
Founding Member, Condom Alliance,  
General Manager - Marketing, Raymond Consumer Care

## Telecom and Technology Sectors



With the influx of smartphones amongst the youth, most of them have easy access to various dating apps as well as adult videos; however, they lack the same access to information and encouragement to indulge in safe sex. Technology can play a key role in making information more accessible. The creative use of gaming and other youth centric platforms can help disseminate the messaging around the safe sex and the use of condoms in a fun and engaging manner. Thus, setting the tone for condoms to be viewed as the smart choice of the 'cool' and savvy youth.

- The SHOPS Plus project in India has developed and launched a chatbot – HelloJubi. The chatbot provides a private, reliable platform for users to receive factual information on family planning and sexual and reproductive health topics. The application both answers users' questions and prompts users to explore common topics if they do not have a specific question in mind. It directs users to speak to counselors through the SHOPS Plus-FOGSI helpline to encourage further conversation. Adaptable to any smart phone or web platform, the chatbot offers interactive video quizzes to provide an immersive experience. Since its launch in February 2020, HelloJubi has seen over 75,000 unique users out of which 70% are male and 30% are female. Each user has spent nearly 1.5 minutes on the chatbot in average and every third user has meaningfully engaged with the chatbot. An analysis of the interaction data shows that the top three areas of interest for the users are oral contraceptive pills, condoms and emergency contraceptive pills.
- There is an opportunity to further harness the power of technology, especially with regards to purchase and delivery of condoms. Online applications and logistic services such as Swiggy, Zomato or Dunzo have the potential to emerge as strong delivery partners that allow last minute purchases without the hassle and hesitation of driving up to a nearby chemist.

## Entertainment Industry



Film makers and OTT players should display appropriate public health messages whenever an intimate scene is shown. Much like messages on alcohol and tobacco are featured on the screen, all intimate scenes should have a message encouraging safe and consensual sex using condoms to avoid unintended pregnancies and STIs.



## Industry Bodies

**Associated Chambers of Commerce and Industry of India (ASSOCHAM), Federation of Indian Chambers of Commerce & Industry (FICCI), Confederation of Indian Industry (CII), Advertising Standards Council of India (ASCI)**

- Offer a corporate platform to champion the cause of reproductive health especially the use of condom amongst the youth.
  - Integrate the cause as part of the organisation's key social initiatives for the year and amplify the issue on an urgent basis amongst key stakeholders.
  - Include improving reproductive health for the youth as part of their social impact reports published and disseminated across important political corridors.
  - Encourage members to initiate workplace intervention programs to educate employees and communities near workplaces about reproductive health issues including condoms.
- Integrate conversation into mainstream media
  - While there is a need to address the content of condom advertisements, there is also a need to broadcast appropriate condom advertisements and other campaign led informative videos during prime time to bring these conversations out of the shadow of obscurity and shame and encourage dialogue.

## Youth Influencers



**Individuals from across platforms such as YouTube, Instagram; lifestyle and fitness focused youth bloggers and Influencers; stand-up comedians as well as other public figures from sports, literature, entertainment and even politics with a strong influence over the youth.**

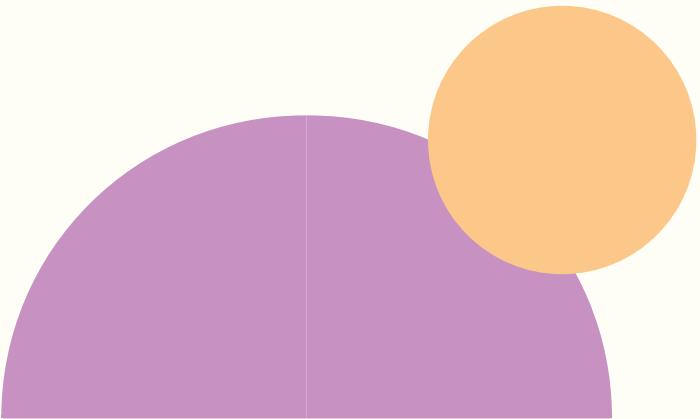
The phrase, “With great power comes great responsibility”, is not just for Spider Man; but stands true for all the youth influencers who have the power of influencing millions of Indians. With the widespread reach that each of the digital platforms offers, it can offer a great medium to communicate the importance of sexual health in the language that the youth connect with, making it a ‘cool’ and smart choice. The youth influencers can:

- Talk about their experience with condom and promote it as a safe and smart choice, at youth platforms and across social media.
- Create a social media challenge that encourages the youth to talk about condoms, make the right choice and share it with pride rather than shame.
- Encourage and empower other women to ask their partners to use condoms and not shy away from carrying one with them akin to a sanitary napkin.

## Youth Brands in the FMCG, personal care, lifestyle and hospitality sectors



- Encourage the use of condoms to promote reproductive health of the youth as part of their initiatives.
  - Create witty, compelling campaigns that resonates with their target audience – the youth and garner brand equity as a brand that truly cares for its customers.
- Integrate the messaging for safe sex and the use of condoms within the brand’s larger campaigns.
- Cross marketing opportunities wherever relevant.

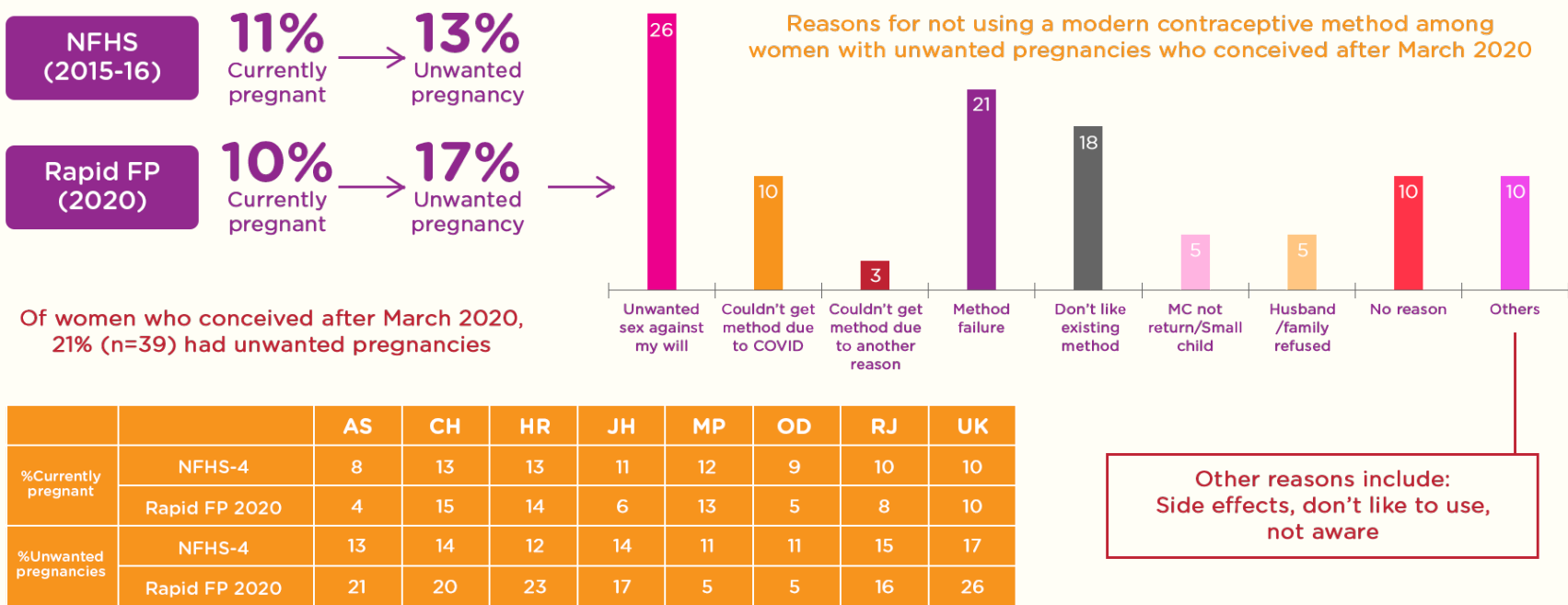


# Annexure

## Impact of COVID-19

- An Abt Associates study indicated that condom sales dipped by 48% over the 3-month lockdown period and projected a one-year decline of 35% in sales.
- Nearly 1 million unintended pregnancies are expected in a year as a result of the lack of contraceptives, according to the Abt Associates study.
- Covid-19 limited 25 million Indian couples' access to contraceptives: UNAIDS
- The WORLD AIDS Day report 2020 also suggests there could be an estimated 123,000 to 293,000 new HIV infections and 69,000 to 148,000 AIDS-related deaths between 2020 and 2022 globally due to the pandemic's long-term impact.
- It is estimated that a 10% decline in use of short- and long- acting reversible contraceptives will result into 15.4 million additional unintended pregnancies globally (Guttmacher Institute, 2020)\*.

Current and unwanted pregnancies in NFHS (2015-16) and rapid FP 2020



- In rapid FP survey 319 women were currently pregnant and 54 reported unwanted pregnancy



A shared value collective of condom market players and other stakeholders to improve the well-being of young people in India.