



JOINING HANDS FOR IMPACT AND GROWTH

Exploring the possibility of a
Condom Alliance to revive
the condom market in India

Consultation Meeting | New Delhi | January 30, 2019

SUMMARY REPORT



SUMMARY OF DISCUSSIONS

On January 30, 2019, the USAID-supported Sustaining Health Outcomes through the Private Sector (SHOPS) Plus project convened a multi-stakeholder consultation to discuss the formation of a Condom Alliance to revive the condom market in India. The need for a strong response is evident from data: condom sales in India have been stagnating at a compound annual growth rate (CAGR) of about 1 percent, and decline in the use of condoms and pills has resulted in high unmet need for contraception among young urban couples. India's large youth population (the largest youth cohort in the world) presents a huge opportunity for both social impact and market growth. Pursuit of this ambitious opportunity requires that India's condom space players join hands and resources for a common purpose: rejuvenation of the condom category.

The roundtable consultation brought together potential Condom Alliance partners—India's leading contraceptive manufacturers and marketers, domain experts, implementing agencies, and donors—on a common platform to deliberate on the alliance's possible goals, structure, and activities to revive the condom market in the country. Thirty stakeholders participated in vibrant discussions and exchanged insights and ideas on India's condom market, its major challenges and opportunities, and the need for collective effort to expand the market.

There was consensus in the multi-stakeholder group that joint action is imperative to realize the business opportunity presented by India's burgeoning youth population. This early consensus on the need for a Condom Alliance is a clear and powerful win. The second important message from the meeting was that market revival crucially hinges on addressing demand-side issues. The group affirmed the need for nuanced, evidence-based demand generation campaigns to address knowledge gaps and negative perceptions regarding condoms among youth. Supply/procurement and regulatory environment related issues were also cited by some; addressing these policy-related issues, the group agreed, would require long-term advocacy with the government.

The consultation ended on a forward-looking, positive note with a clear set of next steps:

- Develop a charter of objectives for the alliance and terms of reference for partners;
- Continue the conversation through one-to-one meetings; and
- Reconvene the group in three months to kickstart collective action

This document captures key insights from the multi-stakeholder consultation on the direction of the Condom Alliance and what its strategy should be to promote uptake of condoms among youth in India.



CONSULTATION MEETING ON CONDOM ALLIANCE

Participation by nine of India's leading condom marketers



Ravi Bhatnagar, Director External Affairs and Partnerships, Reckitt Benckiser



Ajay Rawal, General Manager - Marketing, Raymond Consumer Care



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



Amit Taneja, Deputy Director - Brands, PSI India Private Limited



Mahesh Kalra, Head - Social Marketing and Franchising, HLPPT



Sachin Prasad, Country Manager, Cupid Limited



G. Krishnakumar, Associate Vice President, HLL Lifecare



John Bosco Vaz, Chief Manager - Contraceptive Social Marketing Division, Parivar Seva Sanstha



Ram Parker, Director, Janani-DKT

Forming a multi-stakeholder Condom Alliance to rejuvenate the condom category

WELCOME NOTE



Sanjeev Gaikwad, India Country Representative, Abt Associates

The multi-stakeholder meeting on Condom Alliance began with a welcome note by Dr. Sanjeev Gaikwad, India Country Representative at Abt Associates. Gaikwad appreciated the presence of a diverse set of stakeholders, including marketers and donors, at the consultation and hoped the event would herald the start of a Condom Alliance. He thanked everyone for their participation and stressed on the need for open and candid conversations during the consultation.

OPENING REMARKS



Amit Shah, Division Chief, RMNCH+A, USAID/India

Dr. Amit Shah, Division Chief, RMNCH+A, USAID/India, delivered the opening remarks at the consultation. He reiterated the USAID/India Mission's commitment to working with the Government of India to strengthen its response to health sector challenges. In family planning, the Mission is focused on supporting informed choice, expanding the basket of contraceptive choices, and improving access to quality family planning products and services. Acknowledging that the stakeholders present at the meeting covered almost 50 percent of the condom market share in India, he hoped the group would brainstorm and come up with strategies to revive the condom market and address the contraceptive needs of India's large youth population.

Condom Alliance: A collective aligned to a common purpose

The Condom Alliance is envisaged as a multi-stakeholder collective to coordinate efforts and implement activities jointly to revive and expand the condom market. The alliance would serve to establish, strengthen, and sustain the collaboration between condom manufacturers, marketers, government, and other actors to increase demand for condoms for family planning and reproductive health in India.

SETTING THE CONTEXT



Komal Khanna, Chief of Party,
SHOPS Plus India

USAID's SHOPS Plus project in India is working to increase the use of priority health products and services among urban poor by catalyzing private sector partnerships. Setting the context for the day's discussions, Komal Khanna, the project's Chief of Party in India, presented on the project's aims, strategic vision, and commitment to accelerating India's progress toward FP2020 goals.

SHOPS Plus India is implementing a multi-pronged social and behavior change communication strategy to increase demand for condoms among urban youth. To achieve this, the project is building on its experience from previous integrated communication and marketing campaigns that successfully demonstrated the power of cross-sectoral collaboration.

Elaborating on the iconic *Yahi Hai Sahi/Condom Bindaas Bol* campaign (2004–2006), Khanna mentioned that the campaign had increased retail sales of commercial condom brands by 6.4 percent CAGR and increased the value of commercial condom brands sold through retail outlets by 10.3 percent CAGR.

To replicate and potentially exceed this success, Khanna appealed to condom manufacturers and marketers to jointly implement creative strategies to generate demand and increase the volume and value of the condom market in India.

EVIDENCE FROM RESEARCH



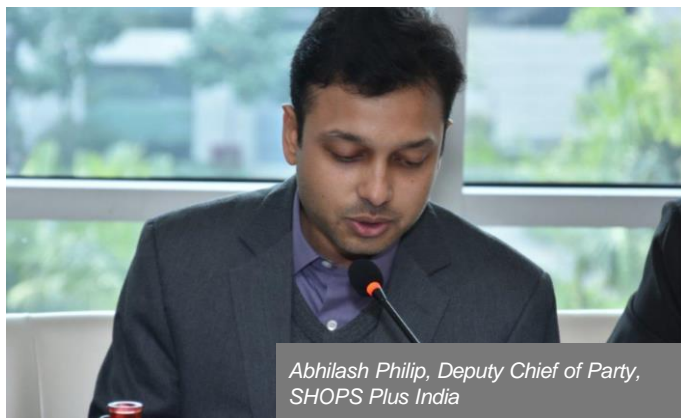
Andy Bhanot, Director - Research,
SHOPS Plus India

Andy Bhanot, Director Research, SHOPS Plus India, presented data to make a case for evidence-based demand generation campaigns. He presented the major findings from a landscape analysis conducted by the project. Key takeaways from the session are presented below.

KEY TAKEAWAYS

- Modern contraceptive prevalence rate (mCPR) has plateaued, driven primarily by a decline in the number of female sterilizations.
- Consumer preference is shifting from permanent to short-acting methods (SAMs) such as condoms and oral contraceptive pills. However, use of SAMs has declined in urban areas, especially in the younger age group (15–29 years), where the unmet need for contraception continues to be high.
- India is home to the largest urban youth population globally, and not tapping into this market is a missed opportunity.
- Stagnation in the condom category (CAGR of 1%) is of particular interest, as 65 percent of the media spend on family planning during 2012–2017 has been on condoms.
- Low awareness and pervasive negative beliefs about condom use are hindering uptake among youth.

DEFINING THE ISSUES



The first roundtable discussion focused on defining the key issues that confront India's condom market. Abhilash Philip, Deputy Chief of Party, SHOPS Plus India, and the moderator of the session, posed two thought-provoking questions to the participants: 1) What ails the condom market? and 2) What is needed to revive the condom category? With nine of India's major condom marketers present in room, these incisive questions generated a stimulating discussion and brought a range of issues to the table. The identified issues are presented below, categorized as demand, supply, and enabling environment related challenges.



KEY ISSUES

Demand

- Awareness and education about condoms is low. Commercial brands' advertising is focused on the pleasure aspect, not so much on protection and sexual and reproductive rights.
- Age of sexual debut is reducing, but condom usage at the time of sexual debut is low.
- There is need for investment in consumer education and in targeting the negative perceptions of condom use (e.g., the belief that condom use reduces pleasure), especially among youth. Both private players and the government need to invest in awareness campaigns.
- Private brands as well as social marketers need the business to be viable to protect their bottom line.
- All players are competing for the same demand. The overall condom market is not growing; brands are growing or declining within the existing condom market.
- The condom market's value is increasing even with stagnation in the condom category; this indicates people's willingness to pay for a better product.
- There is a need to find price points that resonate with consumers of all socio-economic categories.

- New media and digital platforms must be explored, especially to ensure timely broadcast of messages and to effectively reach the youth.

Supply

- New product variants and female condoms must be introduced in the social marketing category.
- Supply chain and procurement related issues are hurting social marketers' sustainability, forcing many to restrict their operations to urban pockets to minimize loss. Social marketers would like the government to provide timely, phased supply of product.

Enabling environment

- Manufacturers are facing issues with sourcing of latex, such as concerns about responsible sourcing of rubber to make latex and use of child labor.
- Issues related to taxation are posing a challenge for manufacturers.
- Restrictions on advertising, such as on the timing of advertisement broadcast, pose a challenge. Along with advocacy to the government on this issue, the industry must also act responsibly regarding the content of advertisements.

KEEPING CONSUMER AT THE CENTER

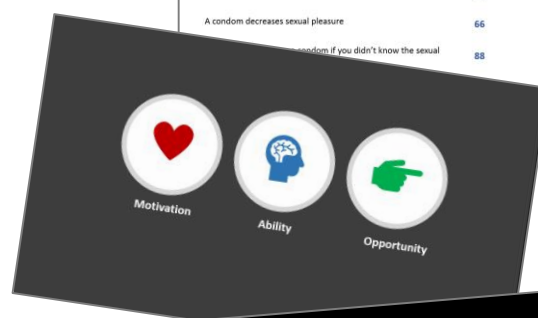
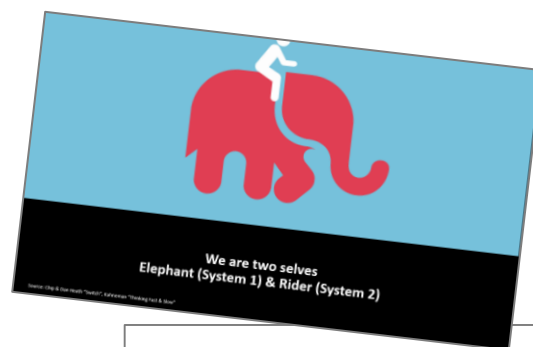


With demand-side issues identified as the biggest challenge to condom market growth, more effective communication with consumers emerged as a solution. Neela Saldanha, Director - Centre for Social Behaviour Change, Ashoka University, put effective communication approaches into sharp focus through her fun, interactive presentation titled “Condoms, masala movies and elephants”. Key takeaways from the session are presented below.

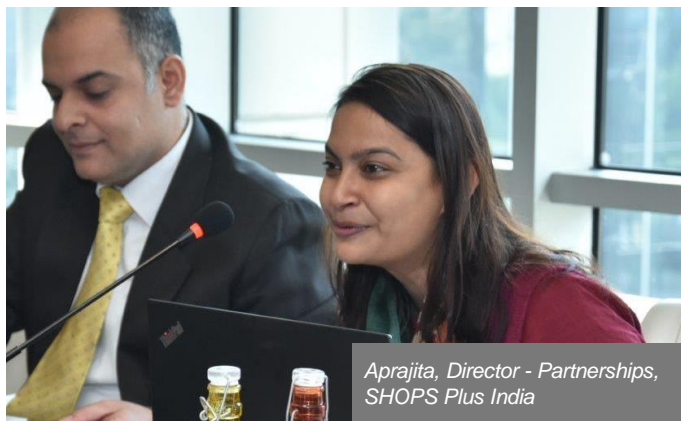
KEY TAKEAWAYS

- There is need for nuanced condom promotion campaigns that understand consumers’ psychology and speak to the less analytical, spur-of-the-moment aspects of decision making.
- Condom promotion campaigns must cater to three key aspects:
 - Motivation: address why one may want to use a condom;
 - Ability: provide procedural knowledge on using a condom; and
 - Opportunity: provide cues about when a condom must be used

SNAPSHOTS FROM THE PRESENTATION



SUCCESS STORIES OF ALLIANCES FROM INDIA AND OUTSIDE



In shaping a Condom Alliance, there is a lot to learn from successful and ongoing models of collaboration within and outside of India. Experts leading three different collaboration models joined the consultation to share insights from their experiences; the session was moderated by Aprajita, Director - Partnerships, SHOPS Plus India.

Dr. Amit Kapoor, President and Chief Executive Officer (CEO) of the India Council on Competitiveness, spoke about how their Shared Value Initiative was connecting business and community leaders to define the practice of shared value in India. He provided insights from the effort to align different stakeholders for the Ease of Living initiative. Krishnan Hariharan, Project Lead for the Bill and Melinda Gates Foundation's Water and Sanitation program at Dasra, shared lessons from the National Fecal Sludge and Septage Management alliance's trajectory as it worked with a diverse set of



partners to build consensus and drive the national discourse on fecal sludge and septage management. Vignesh Shankar, Associate Director at FSG, shared lessons from Collective Impact's ongoing work toward developing a sanitation marketing strategy in Uganda. Key takeaways from the session are presented below.

KEY TAKEAWAYS

- Alliances must bring a diverse set of stakeholders together. For the Condom Alliance, besides market players and development agencies, youth, women, and media must also be part of discussions.
- Although government guidance and buy-in must be secured at the outset, the government can formally be brought into the alliance at a later stage to allow for open interactions among alliance partners.
- In alliances, one member should take the lead as the collective's anchor and facilitator, with clearly defined roles for other partners.
- Social and economic objectives must be brought together. The private sector must see value in the collective. Also, corporates can use the opportunity to make impact through their corporate social responsibility (CSR) mandate.
- The alliance should resonate with the partnering organizations' objectives and operations to motivate them to invest their time, money, and resources.
- Decisions must be based in evidence. The alliance should arm itself with data to understand issues, consumer segments, and the value chain.
- The alliance could have an overarching agenda, with smaller sub-groups to tackle sub-tasks.
- The alliance must be pragmatic and begin with realistic goals.
- Measurement is essential in order to enable the engaged corporates to see the impact they are making.
- Shared management metrics can take time to evolve, and it is important for the alliance to give discussions and consensus building time.
- Learning over the first few years must inform the alliance's trajectory and roadmap for sustainability.

ENVISIONING A CONDOM ALLIANCE



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

Calling the day's discussions timely and insightful, Moni Sagar, Development Assistance Specialist (Innovation), USAID/India, shared her optimism about forming a Condom Alliance of strategic partners to revive the condom market. She elaborated on the vision of the alliance: a forum for condom manufacturers and marketers, the government, donors, media, and other stakeholders to collaboratively address demand and supply issues and shape the market together.

Speaking of the possibility of a larger contraceptive alliance, Sagar emphasized the need for defined priorities and deliverables; commitment of time and resources from the leadership of organizations and from donors; more evidence, especially on pilots to inform scale up; and creative ideas to address common challenges.

DEFINING THE SCOPE OF THE CONDOM ALLIANCE



The last session of the day saw the multi-stakeholder group participate in a discussion on the scope of the planned Condom Alliance, its objectives, composition, and areas of work. Anand Sinha, Country Advisor, David and Lucile Packard Foundation/India, moderated the session. Sinha posed a series of questions to the attendees, exploring the multiple dimensions that will inform the alliance's focus and work. Key insights from the session are presented below.

KEY INSIGHTS

Objectives of the Condom Alliance

- The alliance must set clearly identified short- and long-term objectives.
- To begin with, the collective should aim for short-term goals to secure early successes that can help it gain traction. Demand generation through communication campaigns could be that low-hanging fruit.
- Given India's large youth cohort and its high unmet need, youth should be the focus of condom market revival interventions.
- Category promotion is a common goal for all stakeholders, and the resources and locus of control for demand generation activities lies within the present group, unlike for policy related issues.

Composition of the Condom Alliance

- The alliance should be comprised as a diverse group, including condom manufacturers and marketers, implementing agencies, and donors.
- The government can be formally engaged at a later stage, once the group has charted out its own goals and agenda.

KEY INSIGHTS (Cont'd)

- The alliance should have a core group; smaller technical groups can be formed as task forces for specific interventions. One partner in the core group should anchor and catalyze the effort. SHOPS Plus can play the role of the first 'anchor partner', subsequently transferring the role to another partner based on the alliance's sustainability plan.
- Consistency and quality of participation by partner organizations is crucial. Members should commit to meaningful participation in the Condom Alliance.

Areas of Focus for the Condom Alliance

Demand generation campaigns

- The alliance must work together on category promotion campaigns.
- Demand generation campaigns must be nuanced, thinking of customers in a segmented manner.
- Digital media should be leveraged. Digital media is important not just for demand generation but also to address supply-side challenges, such as issues related to distribution and access.

- The alliance could also craft a common template and guidelines that different partners can execute at their own pace.

Evidence building

- The alliance should also look at co-investing to test models, introduce new products to a wider population, and allocate resources toward evidence generation.
- Presenting the government with data and indices, such as a youth index, can support government buy-in and engagement.

Advocacy

- Policy related issues such as restrictions on advertising and the supply/procurement problems that social marketers face will require long-term advocacy with the government. Revival of social marketing is also of interest to private manufacturers, many of whom are also commercial marketers.
- In planning for advocacy with the government, there must be clarity about which of the several relevant ministries and stakeholders one needs to engage.

NEXT STEPS



The consultation ended with closing remarks by Komal Khanna, Chief of Party, SHOPS Plus India. Khanna thanked the participants for open dialogue and experience sharing, which brought clarity to the idea of a Condom Alliance. She also made a note of thanks to donors, who reiterated their keen interest and commitment to creating strong partnerships to improve access and increase uptake of contraceptives.

Drawing from the day's rich discussions, Khanna stated the next steps toward establishing the Condom Alliance:

- Developing a charter of objectives for the alliance and terms of reference for partners;

- Continuing the conversation through one-to-one meetings; and
- Reconvening the group in three months to kickstart collective action

Khanna also secured consensus from the group about developing and putting Condom Alliance branding on all SHOPS Plus project's promotional campaigns for condom category revival. She ended the meeting by once again thanking everyone for their enthusiastic response and support.

CONSULTATION – LIST OF PARTICIPANTS

S.No.	Name	Organization
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2	Ajay Rawal	Raymond Group
3	Amit Kapoor	India Council on Competitiveness
4	Amit Shah	USAID/India
5	Amit Taneja	Population Services International (PSI) India Private Limited
6	Anand Sinha	Packard Foundation
7	Andy Bhanot	Abt Associates
8	Ankit Vohra	Abt Associates
9	Aprajita	Abt Associates
10	Conjeevaram Haricharan	Abt Associates
11	G. Krishnakumar	HLL Lifecare
12	Gaurav Jain	Independent Consultant
13	Girish Ramachandran	TTK Protective Devices Limited
14	John Bosco Vaz	Parivar Seva Sanstha
15	Karthik Srinivasan	Bill & Melinda Gates Foundation (BMGF)
16	Kavita Sharma	Independent Consultant

S.No.	Name	Organization
17	Komal Khanna	Abt Associates
18	Krishnan Hariharan	Dasra
19	Mahesh Kalra	Hindustan Latex Family Planning Promotion Trust (HLFPPT)
20	Manmeet Bhalla	Abt Associates
21	Moni Sagar	USAID/India
22	Neela Saldanha	Ashoka University
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24	Phanarat Leesawat	Suretex Limited
25	Ram Parker	Janani-DKT
26	Ravi Bhatnagar	Reckitt Benckiser
27	S. Ramanathan	Development Solutions
28	Sachin Prasad	Cupid Limited
29	Sanjeev Gaikwad	Abt Associates
30	Sharda Prasad	John Snow, Inc (JSI)
31	Vignesh Shankar	FSG
32	Vijay Paulraj	USAID/India
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