The Total Marketing Approach (TMA)

The Cambodia Condom Experience

TMA: what is it?
3 components:

1. Impact: Is the market reaching an increasing % of the at-risk population?

2. Equity: Is market evolution benefiting the poor and vulnerable?

3. Sustainability: Is the market becoming less dependent on subsidies?

• Note: “market” includes public sector
Desired TMA Effects

TMA: why should we care?

- Works toward a reduced public investment
- Desires for more effective and efficient segmentation based on ability to pay, access
- Avoids duplication and overlap
- Results in better program decisions
- Requires broadened strategy perspective shift from focus on brand/product to overall category
Cambodia TMA: Maximize Health impact…

…. Through more sustainable markets.

1. Better positioning of brands—based on occasion and price;
2. Building commercial value of Number One condom in order to pull middle class off subsidy
3. Improved Category Promotion ➔ make space for commercial brands
Improved Brand Positioning

**Previous Number One:**
- To low-middle income, urban and rural sexually active men (aged 18-40). Number One is the trusted, affordable and widely available condom brand of choice that ensures safety against HIV without compromising pleasure.

**‘Premium’ Number One:**
- Rithy uses the premium-quality condom Number One when he wants to impress his partner.

Improved Brand Positioning

**Previous OK Condom:**
- To low and middle income sexually active married couples and sweethearts within loving relationships, and aged 18-40. OK Condoms are the dual protection condom brand of choice for couples wanting the insurance of protecting their family with a modern FP method, while having the peace of mind they are protecting themselves from sexually transmitted diseases.

**‘Mass Brand’ OK Condom:**
- For Rithy, OK is the smart choice for HIV prevention products because it is the best value for money.
Improved Category Positioning

Via unbranded BCC condom campaigns that grow the market

**Condom Category Positioning**

**Core benefit of:**
- Makes him a real Khmer man

**Differentiated by:**
1. Lets him be responsible
2. Lets him enjoy himself

The Positioning “Map”

**Condom Use as a Behavior (60% of promo $)**
- Allows real Khmer men to protect themselves so they can enjoy themselves

- **Number One (15% of promo)**
  - To impress your partner
  - Premium-quality positioning

- **OK Brand (25% of promo)**
  - For any occasion
  - Value positioning ➔ the smart choice (i.e., quality & affordability)

- **Hase Hrand**
- **Variants**
- **OK Condom**
- **OK Plus Sachet**
- **OK Plus Tubc**
## Updated pricing/targeted subsidy

<table>
<thead>
<tr>
<th>% COGS Recovered</th>
<th>Consumer Price (per unit)</th>
<th>Consumer price % change</th>
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<tbody>
<tr>
<td>Original “OK”</td>
<td>42%</td>
<td>$0.019</td>
</tr>
<tr>
<td>New “OK”</td>
<td>104%</td>
<td>$0.042</td>
</tr>
<tr>
<td>Original “#1”</td>
<td>35%</td>
<td>$0.025</td>
</tr>
<tr>
<td>New “#1”</td>
<td>146%</td>
<td>$0.083</td>
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## How are we Doing?

### Measuring a TMA to Sustainable Markets

*Improving Metrics to monitor Programmatic Impact*
Cambodia Total Condom Market Volume

The Condom Market
Cambodian Condom Market: Value
(new brands since 2009: 6 major, 15 minor)

O.K. & #1 Condom volume

[Graphs showing market value and volume growth]
TMA Impact: Condom Use

Graph 1: % of condoms users at last sex with sweetheart

- 2008 (N=1021)  
- 2009 (N=1110)  
- 2010 (N=1219)
## Condom Coverage of risky sex acts
(universe of need)

<table>
<thead>
<tr>
<th></th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
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<tbody>
<tr>
<td></td>
<td>88%</td>
<td>91%</td>
<td>90%</td>
<td>86%</td>
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</tbody>
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## Impact of Programs In Summary

- **Health Impact:**
  - condom use behavior trends level but still high
  - UoN work in progress, but high coverage of high risk sex acts

- **Equity of access:** TRaC/MAP data indicate SM condoms still affordable

- **Sustainability:**
  - Social Marketing segment of market significantly more sustainable
  - Total Value of Condom Market increasing
  - New players continue to enter (and exit)
How the TMA Lens has made us smarter marketers

- More effective positioning for our brands and category promotion developed

- Rationalized investments in P&A
  - branded vs. generic, resulting in...

- Improved campaigns growing the category (& measurable behavior change)

- Improved price management
  - appropriately priced brands and more sustainable SM sector

Persistent Challenges

- Information Gaps persist
  - UoN, total market volumes / consumer uptake, private sector volumes

- Differentiating Number One and OK is work in process

- Donor procured commodities and the 3 year decision