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SHOPS Plus: Unifying the voice of India's private condom market players

Problem: Market constraints and low contraceptive use by youth are stagnating India's condom market.

Despite a large condom market valued at Rs. 1,444 crores (\$200 million) in 2020,¹ condom sales in India have been stagnating with an average annual growth rate of 2 percent over the past six years. There are two main reasons for this stagnation. First, demand for condoms is very low, especially among India's 600 million youth. India's National Family Health Survey 4 reports that around 78 percent of men between the ages 20 and 29 did not use any method of contraception at their last sexual encounter. Reasons for low use of condoms range from misconceptions, misinformation, stigma, and fear of judgement in purchasing condoms, to low levels of education about contraceptive methods and negative perceptions around condom use, e.g., it reduces pleasure. Second, constraints imposed on the Indian condom market have made it more difficult to sell condoms, e.g., condom advertising is banned after 9 p.m. on government TV channels, government has imposed a ceiling on the price of condoms, there are challenges in effectively using new media and digital platforms to reach populations, and COVID-related restrictions hamper condom distribution.

Solution: Unify India's condom market players to have a more powerful voice and to share resources and knowledge to grow the condom market.

To increase demand for condoms and effectively influence the government to ease market constraints, condom market players cannot work alone. They need to organize around one unified voice to have more impact.



¹ India's condom market must look beyond flavors and textures. World's innovating (theprint.in)

In India, these players include commercial and social condom marketers, manufacturers, youth organizations, and industry associations. Bringing this diverse group to the table enables its members to benefit from each other's experience, expertise, platforms, and resources to have more influence. These organizations agreed that an Alliance would provide value to all its members, by:

- Serving as a common platform for sector players to come together to share ideas and resources,
- Supporting the implementation of activities to grow India's condom market, and
- Advocating to government to reduce market barrier to growth.

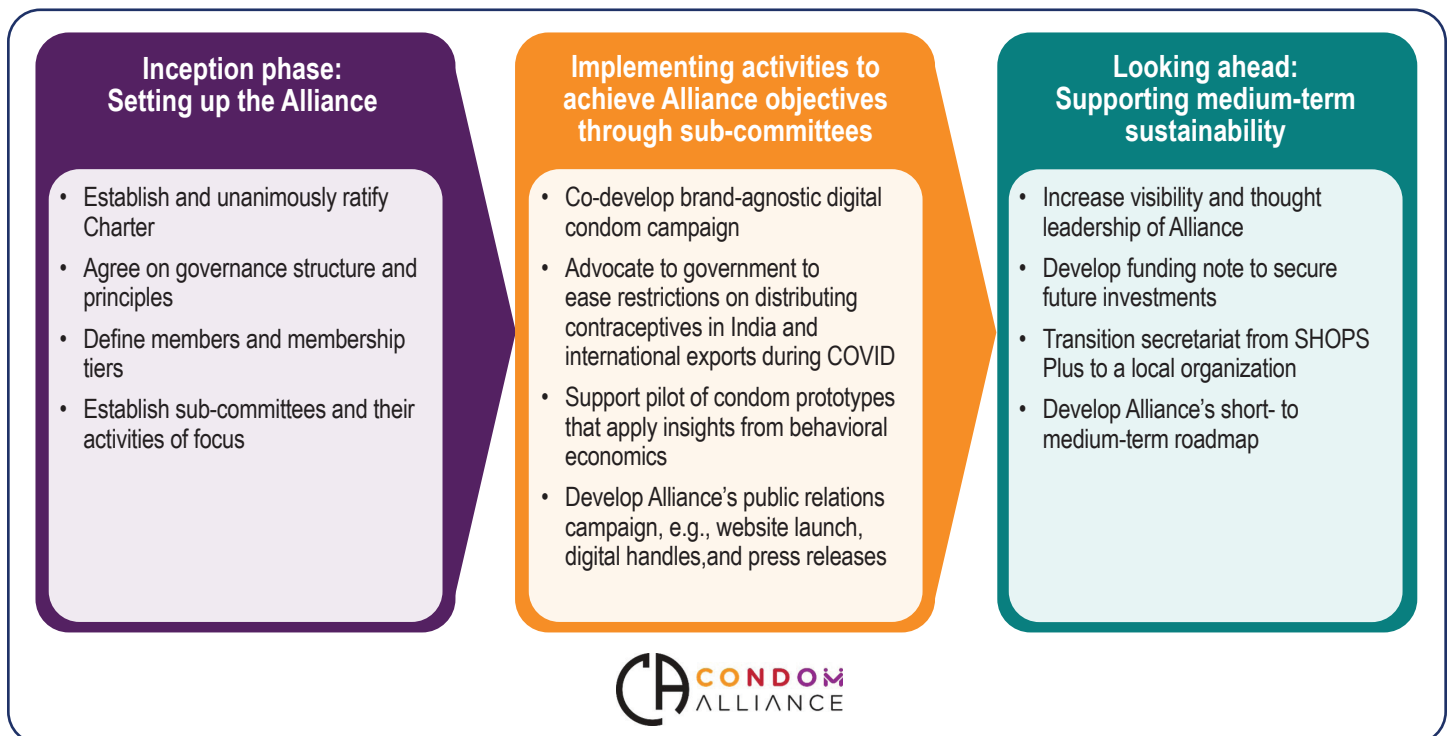
SHOPS Plus Approach: Serve as a neutral broker to establish and initially support the Alliance to set it up for longer-term impact.

To achieve these purposes, India's condom market players came together in 2019 to establish a partnership called the Condom Alliance, facilitated by the Sustaining Health Outcomes through the Private Section (SHOPS) Plus project. The figure below highlights the activities that SHOPS Plus supported, during three distinct phases: setting up the Alliance, implementing activities to achieve the Alliance's objectives, and supporting the Alliance's medium-term sustainability to achieve longer-term impact.

Inception phase: Setting up the Alliance. Prior to setting up the Alliance, SHOPS Plus facilitated industry consultations in January 2019 to assess the need and appetite for a collaboration among India's condom market players and what kind of partnership would appeal to them. SHOPS Plus convened nine leading condom marketers and manufacturers who together constitute over a 50 percent market share of the Indian condom market. These players share a vision of a thriving condom market to contribute to the health and well-being of adolescents and youth in India. All 30 stakeholders whom the project consulted expressed the need for collective action that would not only grow the condom market but each of their individual brands. Addressing market constraints cannot be achieved by just one player and stakeholders emphasized the need for an alliance that would unify the voice of condom market players to have more impact on the market. Following this clear appetite for collaboration, India's first Condom Alliance was born. SHOPS Plus provided support to the Alliance members by serving as a neutral facilitator and secretariat, organizing a series of subsequent meetings that:

- Developed and ratified the Alliance charter, establishing the three key Alliance strategies of (i) demand generation, (ii) evidence building, and (iii) policy and advocacy.

Condom Alliance activities supported by SHOPS Plus



- Defined the governance structure. The Alliance is led by a Steering Committee and formed of (i) core members of the Alliance consisting of organizations that have a business interest in growing the condom market (manufacturers, commercial marketers, and social marketing organizations), and (ii) technical members including organizations and agencies that are technical experts in areas of focus of the Alliance (organizations focusing on digital content and media for youth, donor-funded implementing partners).

Implementing activities to achieve Alliance objectives through sub-committees. The Alliance members set up three sub-committees, each with Alliance members serving as sub-committee leads. SHOPS Plus supported the three sub-committees, which had the following scope:

- **Create reputational capital to increase the credibility and influence of the Alliance among its stakeholders.** In May 2020, through this sub-committee, the Alliance successfully advocated to the government to ease COVID-related restrictions on contraceptive manufacturing and distribution in India, and to remove the temporary ban on international exports. This sub-committee also worked with a local public relations firm to develop a communication plan to increase reputational capital. To celebrate the two-year anniversary of the Condom Alliance, a public relations campaign was conducted to officially launch the Alliance and position it as “as a cohesive and committed industry body dedicated to the cause of improving sexual and reproductive well-being of adolescents and youth in India.”
- **Increase new users among youth.** In February 2021, and in collaboration with SHOPS Plus, the Condom Alliance members created a digital campaign to increase condom use among the youth in India. Condom Alliance members provided inputs to the campaign’s creative brief and acted as spokespersons for the campaign. The campaign was built around an original song (*KaunDumbHai* meaning, “who is dumb?”) As a demonstration of the strength of the Alliance, its members (who are competitors) agreed for the digital campaign to be brand agnostic and further amplified the campaign on their social and digital handles. This sub-committee also supported a study to develop condom prototypes based on human-centered design and supported

its market testing. In July 2021, the Condom Alliance partnered with United Colors of Benetton to further the initiative #UnitedByC.

- **Ensure the sustainability of the Alliance to achieve long-term impact.** This sub-committee commissioned SHOPS Plus to conduct a [landscape review of alliances](#) worldwide to capture lessons on what has made effective alliances, touching on themes such as inception and growth of an alliance, membership, funding, governance, evolution, and leadership and knowledge management. The findings from the landscape review are being used to inform the future of the Alliance.

Looking ahead: Supporting sustainability.

SHOPS Plus worked with the Alliance to develop an investment case to advocate to organizations that could support the Alliance’s secretariat and evaluated interested organizations that could serve as a more permanent secretariat for the Alliance. In July 2021, the Alliance transitioned the secretariat to the Associated Chambers of Commerce and Industry of India (ASSOCHAM), a nongovernmental trade association and advocacy group that has operated in India for over 100 years. The commitment of the Alliance members is demonstrated by the funding that they have provided to ASSOCHAM to serve as the secretariat. The sub-committee is also leading the development of a two-year roadmap to prioritize the activities that the Alliance will focus on.

The Condom Alliance’s key achievements

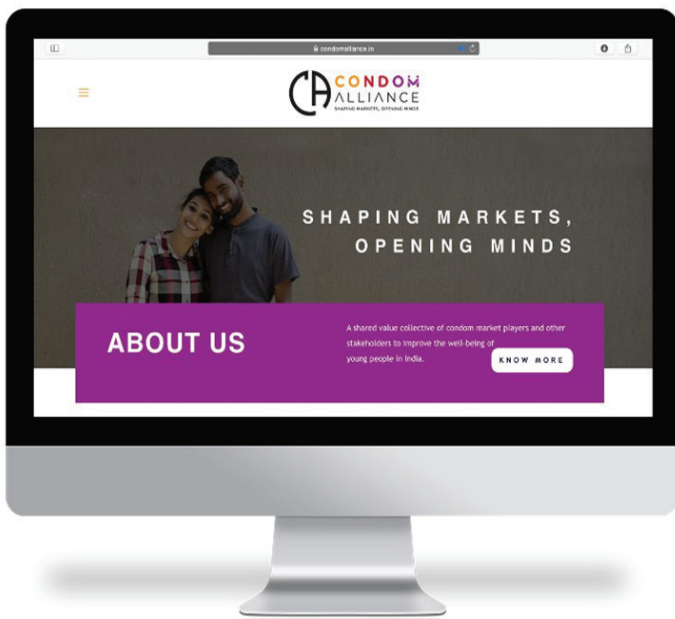
In less than two years, the Condom Alliance has made significant achievements, which has helped to create momentum and increased interest from members to secure the success of the Alliance.

“The Behavioral Economics research was much needed as the [condom] 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.”

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

The Condom Alliance **supported the development of innovative condom prototypes** to increase condom use among India's youth. Using findings from behavioral economics research led by SHOPS Plus, Alliance members provided feedback on condom prototypes to be tested in the market.

To effectively reach youth, the Condom Alliance **launched a digital condom campaign** to address negative perceptions around condom use among unmarried urban youth 15–24 years of age. The digital campaign reached approximately 7 million people, with the help of over 120 influencers who amplified the campaign messages. The campaign hashtag (#KaunDumbHai) trended on Twitter and received more than 21 million impressions.



To celebrate two years of the Alliance, a **public relations campaign** was launched to solidify the Alliance's unique identity and to increase awareness about it. The campaign included a new logo, a [website](#), digital handles on LinkedIn and Twitter, opinion pieces authored by Alliance members, and press releases in over 25 publications such as India Today, Money Control, and The Print, and interviews in the media. The Alliance also commissioned the first-ever [Condomology Report](#), a term derived from Consumer Condom Psychology, which provides a comprehensive understanding of the consumer psychology and attitudes toward the use of condoms. The report highlights the less discussed insights on consumer psychology with regard to condom use and urges stakeholders to take urgent action to bring conversations around condoms and reproductive health into mainstream society and initiate behavior change to help society at large. The Alliance brought on India's leading youth and digital influencer, Miss Malini (Malini Agarwal) as part of the launch to help spread the messages of the Condomology Report.



“In less than two years [...], the Condom Alliance has made impressive progress... It is providing a vital platform for many condom manufacturers, marketers, and development partners to come together to create shared value and to also have a constructive dialogue with the government.”


Moni Sagar, Health Office Lead, USAID/India

Lessons Learned

Brokering the partnership between the Condom Alliance members required perseverance and patience to deal with challenges along the way, e.g., change in management at the member organizations and finding time with members who were also senior managers at their organizations. SHOPS Plus served as the secretariat for the first two years, committing to regularly engaging with the Alliance members, facilitating regular meetings, following up with members who missed meetings, and sharing information and key market insights, to keep everyone engaged.

The landscape analysis of successful alliances conducted by SHOPS Plus generated valuable lessons learned for the Condom Alliance. First, it indicated that **getting an Alliance up and running typically takes approximately five years**. The Condom Alliance has made significant achievements in the first two years, and the next few years with ASSOCHAM as secretariat presents an exciting opportunity to propel the Alliance to new heights. **Developing and promoting a clear member value proposition** is critical to attracting and retaining members in a partnership—this was especially important for the Condom Alliance because a value proposition that brought fierce competitors around the table was needed.

The Alliance had to provide benefits that member organizations could not achieve by themselves. And each member had to be invested in growing the condom market as a whole while also providing benefits to their organization. **Articulating a shared vision** of focusing on improved health and well-being of youth to grow the condom market and advocating with the government for an enabling environment helped in bringing them together. **Developing activities that build trust among members helps to strengthen the partnership**. The achievements of the Alliance so far have helped to increase enthusiasm and commitment even more among the members, as they start to see tangible benefits from being part of the Alliance. Invested leaders are emerging, and are spearheading Alliance activities and committing their organization's resources to the Alliance. Engaging a neutral broker was very important to establish trust between members who were also competitors. **SHOPS Plus successfully served as this neutral broker to help establish trust among the members**, as they were reassured knowing that all members were on a level playing field and SHOPS Plus would not be influenced by any one member.



“We [the government] 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 Khara, former Commissioner, Ministry of Health and Family Welfare, Government of India