

CATEGORY FOCUS

Contraception and sexual health

From chlamydia testing to EHC, consumers are turning to their local pharmacy for treatments and boosting the sector's profits, reports **Emma Wilkinson**

No longer just about selling condoms and dispensing the Pill, over the counter provision of emergency hormonal contraception (EHC) and chlamydia testing has opened the way for pharmacists to expand sexual health services across the board.

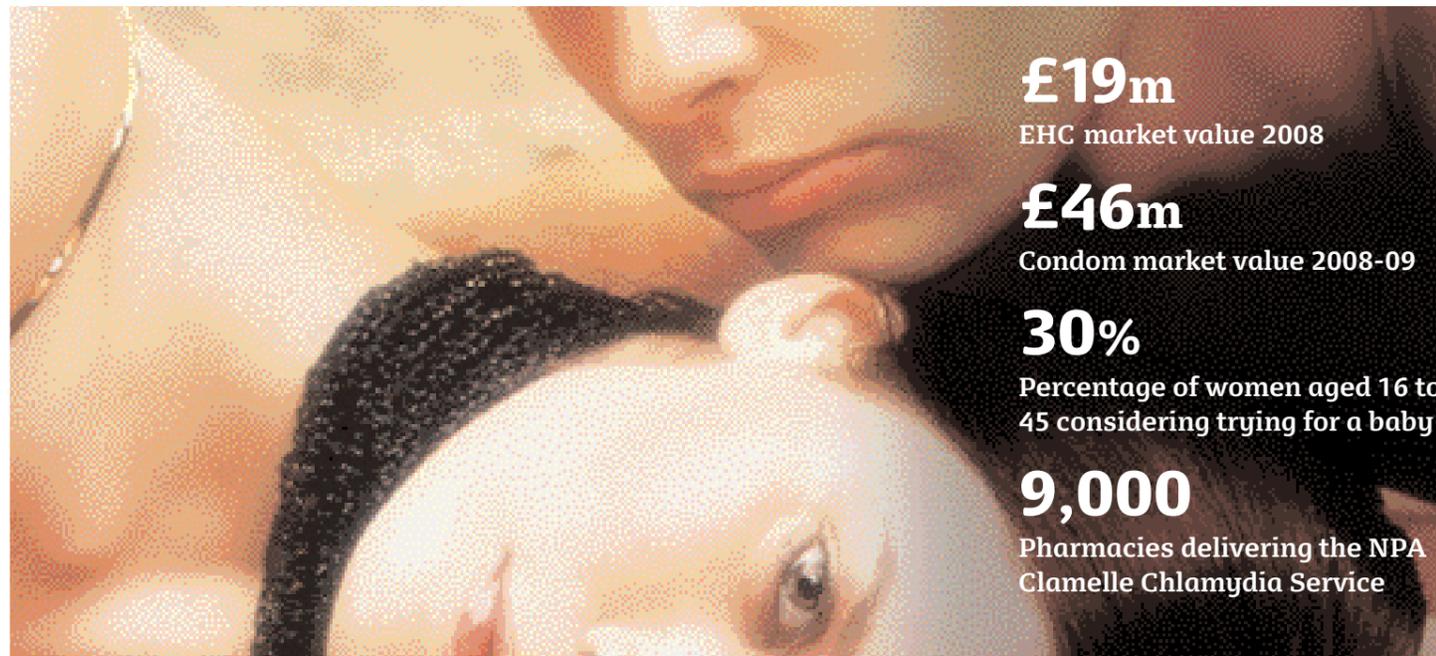
It is likely that the enhanced provision of such services will increase as PCTs and commissioners increasingly get on board with the push, as outlined in last year's pharmacy white paper, to give the profession a greater role in sexual health provision. Data from Euromonitor shows that EHC was worth £19 million in 2008, a jump of more than 10 per cent from the previous year, and sales are expected to continue to grow strongly.

In addition, chlamydia screening has in recent years been leading the drive to encourage the public to choose the pharmacy before the GP for their sexual health needs.

Offering an education

Both of these services offer the perfect chance for pharmacy to educate about sexual health in general, whether it is handing out medicines with leaflets and vouchers for condoms or signposting to other services, especially in light of a strong and widely publicised government push to lower rates of sexually transmitted infections (STIs).

Richard Hollies, OTC director at generics



£19m
EHC market value 2008

£46m
Condom market value 2008-09

30%
Percentage of women aged 16 to 45 considering trying for a baby

9,000
Pharmacies delivering the NPA Clamelle Chlamydia Service

company Actavis UK, says 9,000 pharmacies are now signed up with the NPA's Clamelle Chlamydia Service. The £24.47 testing kit and £19.57 Clamelle azithromycin 500mg tablets – the first OTC oral antibiotic, launched in November 2008 after MHRA reclassification – “places pharmacists back at the centre of healthcare provision and public health”, says Mr Hollis.

Pharmacy is in a fantastic position to boost this side of the business, with long opening hours, discreet service, private consultation rooms where needed, and a range of sexual health services in a one-stop, stigma-free shop.

Mimi Lau, director of professional and training services at Numark, says when it comes to sexual health, community pharmacy can reach those who are less likely to access healthcare any other way.

“Although condoms are available from many

different outlets, only pharmacies can provide the advice and education many of these young people need,” he says.

Emma Charlesworth, Numark's merchandising manager, agrees: “I firmly believe that advice and education is absolutely paramount.

“We have a niche when it comes to providing a supportive role to customers and ultimately this can lead to loyalty and increased sales. Providing sexual health counselling, support and safe sex consultation adds a USP to our service, rather than just selling Levonelle or Clamelle.”

One of the most important considerations for the pharmacist is to be approachable and non-judgmental. It may seem that UK society is becoming more open about sex and sexuality, but many customers, especially the young and most vulnerable, will find it excruciatingly embarrassing to ask about STIs or EHC.

Boots pharmacist Angela Chalmers says promoting good sexual health knowledge is key and she is amazed by the number of young women who do not attend for a smear test, yet are experiencing pain or bleeding, and do not know that cervical cancer is caused by an STI.

But she adds: “Women tend to present more often for advice than men, so don't forget about the guys. Well-placed leaflets around the shaving products of local sexual health clinics can discreetly signpost men to the nearest clinic.”

The rise of sexual wellbeing

Despite the rise of these enhanced services, pharmacies may do well to note that although the condom market is declining slightly, it is still worth £46m annually, according to market

analysts Information Resources (IRI). Durex remains the best selling brand, and has somewhat reinvented itself with its Durex Play range, which has been at the forefront of strong growth in the lubricant sub-category and introduced sex aids to the high street (see Case studies on p22).

Mike Johnson, marketing manager at Rowlands, explains that there is a move towards sexual wellbeing and sexual harmony. “It's no longer a taboo subject to talk in terms of enhanced pleasure condoms or sexual aids,” he says. “Enhancing pleasure within the relationship now appears to be the universally accepted approach. As a result we have seen an influx of enhanced pleasure condoms, lubricants and sex aids.

“Durex are most definitely our best selling condom range and their range of lubricants have overtaken more traditional pharmacy lines like KY.”

Mr Johnson adds that pharmacy needs to ensure its ranges are up to date with the newer more innovative products, “rather than sticking to the old variants and sizes”.

Conception capital

The other side of the coin to condoms and EHC,

and a huge part of the sector, relates to couples actively trying to conceive.

Valued at over £41m by IRI and growing, the pregnancy testing market is substantial. And although it saw a slight decline in sales in the past year, the ovulation testing market is worth an additional £5.5m, IRI says.

These figures are perhaps not surprising when you consider that at any one time, according to an IPSOS poll, over 30 per cent of the female population between the ages of 16 and 45 are considering trying for a baby.

Analysis by Procter & Gamble, manufacturer of ovulation and pregnancy test brand Clearblue, has shown huge demand for better information around conception, and has led to the launch of the Wish for a Baby programme, with educational literature, informative display materials and product training, including an accredited eight-module CPD course, for pharmacy.

Joanna Dee, P&G commercial manager of consumer healthcare and pharmacy, says the idea is to show women and couples who are trying to conceive that the pharmacist is a “true expert” they can speak to with total confidence. ▶▶

Best-selling brands for contraception and sexual health

Condoms

1. Durex
2. Mates
3. Pasante
4. One Condoms
5. Femidom

Ovulation test kits

1. Clearblue
2. Own Label
3. Persona
4. Babystart
5. Quik Check

Pregnancy test kits

1. Clearblue
2. Own Label
3. First Response Early Result Pregnancy Test
4. Predictor
5. Answer
6. Reveal
7. Suresign
8. Lady Care
9. Early Bird
10. Truline

Lubricating jelly

1. Durex
2. KY
3. Replens
4. Biofem
5. Rephresh
6. Sensilube
7. Vielle

Feminine creams

1. Vagisil
2. Balance Activ

Source: IRI value sales 52 weeks to October 3, 2009

Market insight

The past year has seen a decline in condom sales. Leading brand Durex has seen a decline across many of its sub-brands. Mates condoms bucked the trend with growth of 3 per cent, a figure partly explained by new launches. And pharmacy (including Boots and Superdrug) lost ground to the major supermarkets in its value share of the condom market.

But the small drop in condom sales is offset by strong growth in the lubricating jelly sub-category. This has been largely driven by new additions to the Durex Play range and pharmacy took the lion's share of the growth, with two-thirds of sales. Durex Play has grown category sales as well as stealing share from existing products.

Feminine creams have shown huge growth in the past year – a result of the launch of the Balance Activ brand. Pharmacy has also shown impressive capitalisation on this increase, with almost 80 per cent value growth, compared to 40 per cent value growth in major supermarkets.

Sales of pregnancy testing kits have shown a 4 per cent year on year rise, in line with the growth in birth rate. This is the only sub-category where own brand products get a look in, beating First Response into third place.

Source: IRI value sales 52 weeks to October 3, 2009. Analysis for C+D provided by Information Resources (IRI)



Case studies

Linking condoms to counselling

Numark has joined forces with manufacturer SSL to run a pilot campaign in 10 pharmacies linking a Durex promotion to emergency hormonal contraception (EHC) services.

As part of the counselling during the EHC consultation, patients are provided with a voucher for 20 per cent off Durex condoms.

Ian Facer, a pharmacist in Longton near Preston, is one of those taking part in the pilot. He has been offering a PCT-funded EHC service for four years, at £10 per consultation, and it is now rare for him to see a script for EHC.

"If they say they haven't used a barrier form of contraception, I would explain about protection and discuss sexually transmitted diseases," he says. "It is at this point I would mention the voucher."

The scheme is in its early days and so far no one has cashed in a voucher, which Mr Facer says is a little disappointing – but he remains hopeful.

"For me it's the principle, though; it allows me as an independent to differentiate myself from my competitors and I strongly believe we should work more with industry and use their expertise to add value to the patient and our service."

Brandwatch: Durex

Durex is, perhaps unsurprisingly, the best-selling brand in the condom market. But the condom

market is declining (2.4 per cent over the past year). However, Durex points out that "over a significant period" of monitoring, its condoms have "consistent sales year on year".

A spokesperson for the brand says: "As the market leader, the Durex brand's behaviour mirrors the overall performance of the condom market. Market trends can be affected by many factors over a short period, including shopper behaviour and in-store promotions, for example."

In another sexual health sub-category, Durex is again the leading brand, and in this instance driving huge growth.

Just five years after launch, its Durex Play range of lubricants now has 55 per cent share of the market and is showing over 40 per cent yearly growth. The Durex spokesperson says: "This significant growth can be attributed to the brand's commitment to consistently innovating and communicating its proposition to customers."

Durex Play has also introduced a range of sex aids, including vibrating cock rings, "taking sexual enhancement products out of sex shops and onto the high street".

The spokesperson adds: "Durex Play will continue to refresh its proposition by innovating and bringing new products to the market to help grow this category even more."

Pharmacy V Grocery: market share changes 2008 to 2009

CONDOMS



PREGNANCY TEST KITS



LUBRICATING JELLY



OVULATION TEST KITS



FEMININE CREAMS



Major grocery multiples
Pharmacy

Source: IRI value sales 52 weeks to October 3, 2009. Data provided for C+D by Information Resources (IRI).



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Product news

£1m pledge for Vagisil

Best-selling feminine care range Vagisil last year increased its advertising spend to £1 million.

For 2010, manufacturer Combe International has now pledged a further £1m for a "heavyweight" national TV advertisement campaign.

The range, which includes a feminine wash and anaesthetic cream for relief from vaginal irritation, will be back on air in the new year.

Combe International, tel: 0208 680 2711, www.vagisil.co.uk



A hormone-free solution to vaginal dryness

Vaginal dryness as a result of hormonal changes affects almost 40 per cent of peri-menopausal and over 55 per cent of post-menopausal women, according to a survey published earlier this year.

Moisturising gel ReplensMD offers a hormone-free solution to the problem.

It works by slowly releasing purified water from a 'polycarophil', which clings to the vaginal wall for three days until the natural shedding of cells.

ReplensMD is available as a three-dose pack, a six-dose pack and a 35g tube (up to 12 applications).

Anglian Pharma, tel: 01256 772742
www.replensmd.co.uk



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