

Sexual Health & Fertility

A Hot Topic Report from  **Nicholas Hall's**
CHC REPORTS



"Sexual health is one of the biggest growth prospects in our industry. Whether we are talking about conception products, contraceptives or ED remedies, there is a strong public health case for more favourable regulations, right across the spectrum from helping to prevent unwanted teenage pregnancies to ensuring that fake Viagra is stamped out on the internet."

– Nicholas Hall

Sexual Health & Fertility

A Hot Topic Report



Sexual Health & Fertility is a vibrant area of the consumer healthcare field, encompassing a broad assortment of products, from supplements to home diagnostics, apps to analgesics, and awash with possibilities for expansion. This report looks at trends in birth rates and what this means for key fertility brands, the effect of the Covid pandemic on sexual health categories, and the importance of female empowerment in expanding women's health brands, among other key topics.

Key Features of this report:

- Tracks activity across **Contraception, Fertility & Pregnancy, Sexual Health Problems, Intimate Care & more**
- Investigates the current landscape across various markets
- Profiles key brands, including success factors
- Highlights trends and new developments
- Tracks NPD and Rx-to-OTC switch activity
- Showcases examples of promotional activity
- Features selected sales data (from our dedicated **DB6** database)
- Examines what the future holds & forecasts future scenarios
- Case studies profile key brands including Clearblue, Durex, Elevit, Viagra Connect & more



Coverage includes recent developments such as Europe's centralised Rx-to-OTC switch and rollout of a topical spray for **premature ejaculation**, the UK's approval of **daily oral contraceptive pills** without prescription, and the push to make them OTC in USA.

The nascent market for **erectile dysfunction** treatments is fully explored, including future prospects and potential size of the market. The report dives into the booming **FemTech** (female health technology) sector, encompassing a host of technologies focused on period care, fertility, pregnancy & childbirth, menopause and sexual health.

Topics covered in this report

Contraception

Daily OCs • EHC • Condoms • Alternative methods

Fertility & Pregnancy

Pregnancy & Ovulation tests
Pregnancy & pre-pregnancy vitamins • Other fertility CHC

FemTech

Female health technology • Fertility & birth control apps

Sexual Health Problems

Erectile dysfunction • Premature ejaculation
Female sexual dysfunction • STDs

Intimate Care

Feminine intimate care • Male intimate care • VYI treatments

Menstruation

Period pain • Premenstrual syndrome • Menopause

Pricing

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FemTech | Vivant extends FemTech apps into India and other Asian markets

- While the majority of FemTech products are developed and launched in Europe or N America, there is some activity in Asia
- In 2019, Mumbai-based digital health startup Vivant launched Nyra across Asia and the Middle East
- There is clear demand for new, tech-driven approaches to women's healthcare in these markets; Vivant claims an estimated 23mn young women in India have had to drop out of school owing to menstrual health issues and poor women's health education
- Vivant has an established presence in e-Health, with a more general service available in its Vivant app, which includes a "health dashboard" to allow users to access health records and make appointments for check-ups at local diagnostic centres as well as access telehealth services and health resources
- In general, e-Health is a channel with strong potential in Asia-Pacific, especially India, as penetration of smart devices is generally growing while access to healthcare and health information has yet to catch up in some areas; easily-accessible e-Health services can help consumers make better-informed health decisions



NYRA

- Aim of Nyra app is to increase access to reliable health information, including via availability in a range of languages (Hindi, Malay, Indonesian and Tamil); lack of resources for non-English speaking women is another inequality in access to healthcare which the new generation of FemTech products is addressing
- As well as support for menstrual health issues, app includes lifestyle and fitness trackers including a pedometer and a fertility tracker (although marketing stresses that this should not be used as a substitute for contraception)

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Daily OC | South Korea's market opening up via NPD

- Sales of leading brand **Mercilon** (desogestrel + ethinyl estradiol) were impacted by change in distribution partner from Yuhan to Chong Kun Dang in 2019; in light of this, owner Avogyn increased investment in marketing in 2020, including "Merci-Learn" educational videos and TV ads as well as a new brand website
- Marketing focuses on dispelling misconceptions about use of daily oral contraception, and highlights how the brand has an established international heritage across 43 markets and a strong safety profile
- TV ads with "#LoveMe" hashtag (see right) focus on themes of female independence; advertising of contraception in Korea is relatively uncommon and demand for OTC contraceptive pills low despite availability in pharmacies
- Campaigns such as this, as well as renewed interest in advertising of contraceptives such as condoms as ways for women to take more control over their sexual activity, may be a sign of social change which will revive the market; it is likely that a major factor holding back Korea's daily OC market is slow-changing social attitudes to sex



Following the end of its sales contract for Mercilon in 2019, Yuhan launched **SenseDay**, using its accumulated expertise in promoting contraceptives to support the brand with A+P including an informative website (see left); marketing uses the tagline "Lighten the worries in my heart"

Brand imagery and advertising encourages couples to take shared responsibility for contraception

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EHC | Broad geographic availability, but challenges remain

- Emergency hormonal contraception is available Rx in almost all countries and without prescription in a large number of markets, but segment remains underdeveloped in many and is notably absent from a number of key CHC markets including Latin America, Russia (although UTC sales there are reportedly common), Japan and South Korea
- In some cases this is because non-prescription access is via family planning clinics and HCPs, where EHC and other forms of birth control are often dispensed free of charge, rather than in the retail pharmacy channel
- Nevertheless, there are key advantages to pharmacy availability where permitted, as it gives women more control over how and when they can access EHC
- This was particularly apparent during the Covid-19 pandemic as many consumers could no longer easily access HCPs, leading to EHC marketers recommending women keep a stock at home and make use of mail order and e-Commerce services where available
- In Ireland in 2020, pharmacy chain McCabes partnered with HRA to offer a click & collect service for ellaOne, in light of findings that a relatively low number of women used EHC but many would be more likely to do so if it was available online
- Demand in Australia during the pandemic was so high, combined with supply issues, the TGA implemented supply limits for OTC levonorgestrel in March 2020



2010s saw significant liberalisation both in terms of regulations and social attitudes to EHC access (and birth control more widely), including EU-wide centralised switch in 2015, and category is now growing well in almost all markets where available

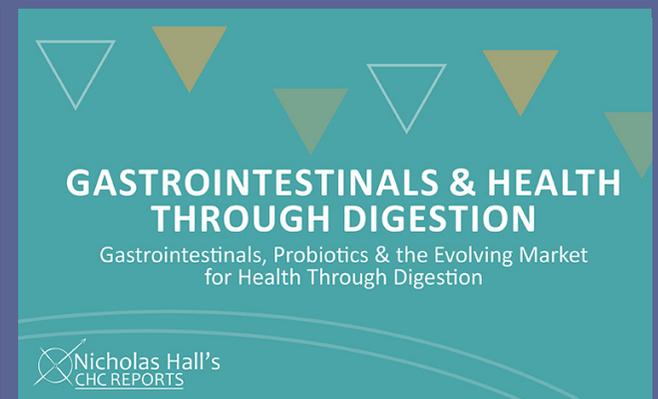
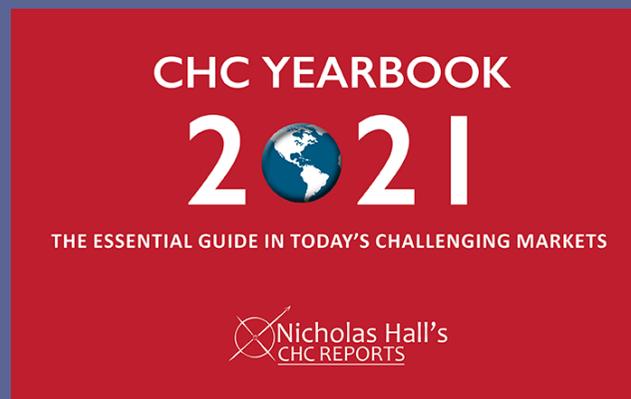
However, a combination of factors including social opposition and conservative healthcare policies form a significant barrier to future switch, particularly in regions such as the Middle East and Africa

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