

Sexual Health - UK - July 2012

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"Overall the sexual health picture is not as positive as might have been predicted a year ago. Perhaps for greatest overall effect messages have to be delivered at the point of sale, to emphasise the importance of consistent use of condoms. To reach non-regular users, maybe brands could consider taking the message into a typical social/sexual setting like a bar or club, through pack or display design or maybe event sponsorship."

– Michelle Strutton, Senior Consumer Analyst

In this report we answer the key questions:

- Is own-label increasing its threat to branded condoms?
- How much impact does availability of free condoms have on the retail market?
- Is embarrassment an issue for condom buyers?
- What role does alcohol play?
- What are the barriers to using condoms?

Market size data used throughout the report only include sales of condoms through retail outlets.

Excluded

- Emergency contraception (ie the morning-after pill) is not included in sales data although this method of contraception is mentioned where relevant.
- Prescription-only contraceptives, such as oral contraceptives ('the pill'), chemical, other barrier methods (eg diaphragms) and LARCs (long-acting reversible contraceptives) are not included in the sizing of the market, however, this report includes some data and discussion of these methods for the purposes of putting the market in context.
- Other methods of birth control such as sterilisation, vasectomy or natural methods (Persona) are not included in market size but are referred to in order to indicate trends within the market.

All forms of contraception (including condoms and the morning-after pill) are available free on the NHS. No prescription charges are payable for any type of contraception. All forms are available free from family planning clinics and from some GPs.

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