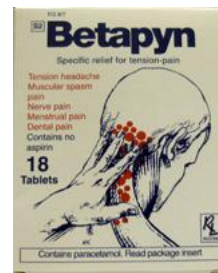


SOUTH AFRICA BRAND REPORT

– CONSUMERS OF HEADACHE PILLS/POWDERS –



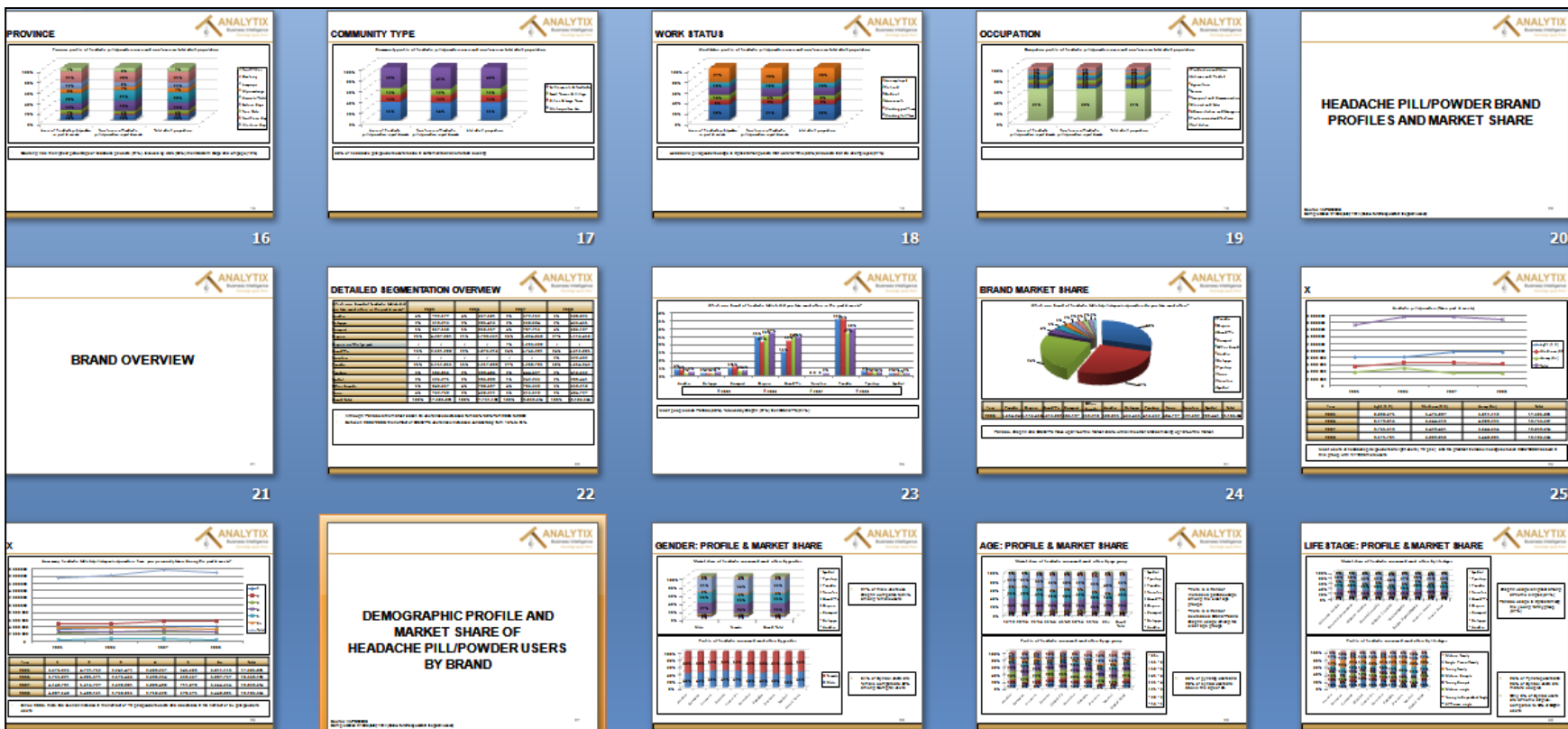
COMPILED: FEBRUARY 2010

REPORT OVERVIEW

Compiled: February 2010
(68 pages)

- This report examines the headache pill/powder segment of the South African market.
- It answers the questions: who are the users of headache pills/powders, what brands are they using, and how do I communicate with them?
- It provides a comprehensive profile of the entire headache pill/powder segment, as well as a detailed segmentation by brand, namely: Anadin; Betapyn; Compral; Disprin; Grand-Pa; Nurofen; Panado; Pynstop; Syndol.
- It examines in detail the demographics, lifestyle, media consumption and cellphone and Internet usage of the headache pill/powder segment by brand, making it a vital reference report for anyone wanting to understand this segment of the market.

SCREENSHOTS FROM REPORT



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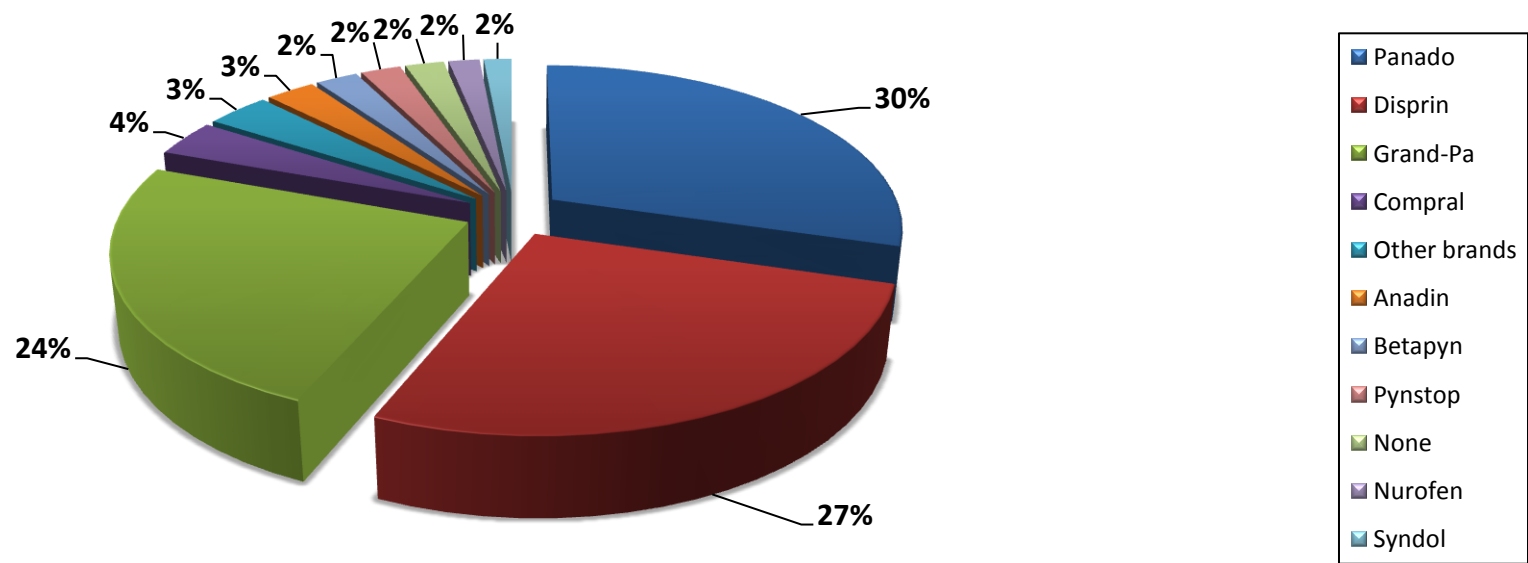
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68 page report with 100+ charts, graphs, tables and insights

SAMPLE FROM REPORT: BRAND PENETRATION 2008

Which one brand of headache tablets/pills/capsules/powders do you take most often?

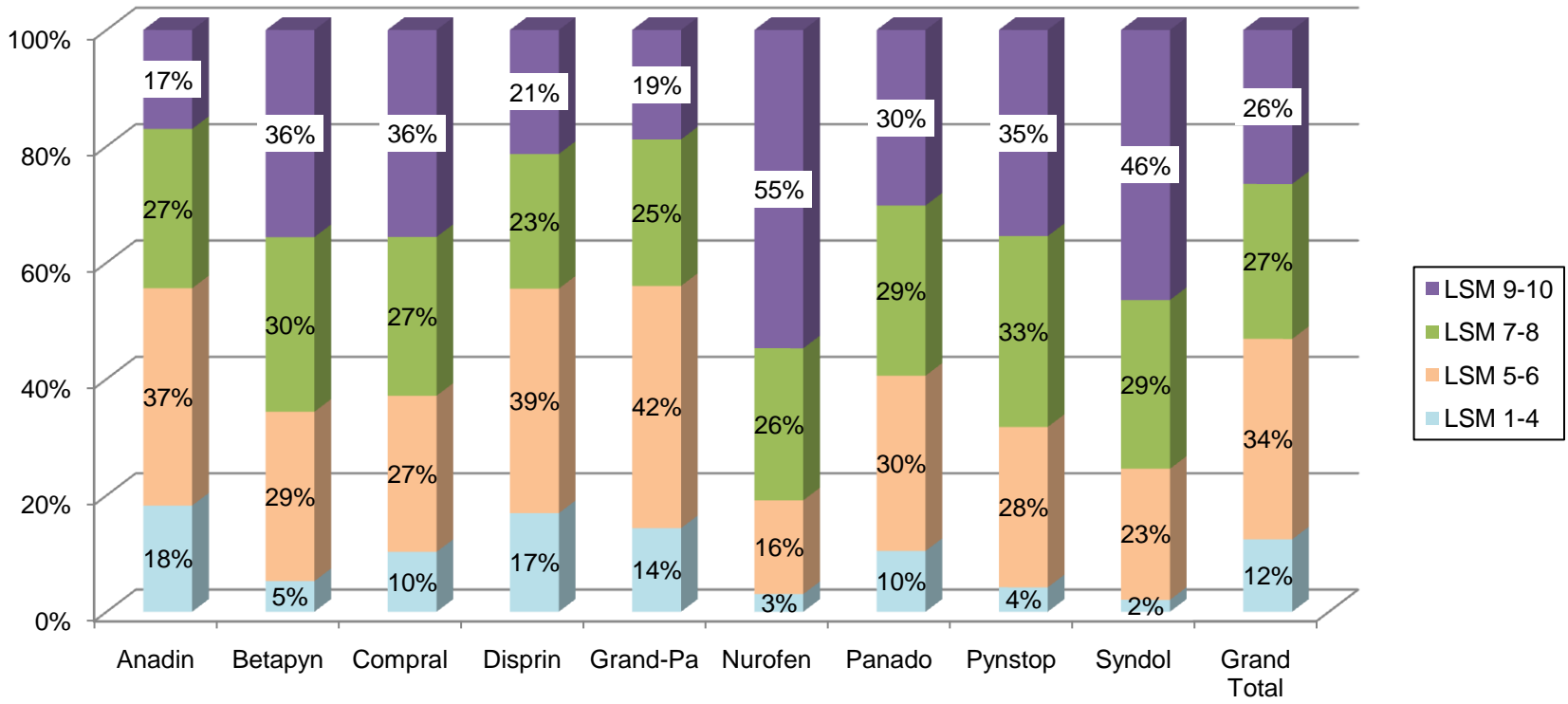


Year	Panado	Disprin	Grand-Pa	Compral	Other brands	Anadin	Betapyn	Pynstop	None	Nurofen	Syndol	Total
2008	5,654,943	5,116,450	4,613,805	686,197	659,218	508,823	433,435	416,632	404,727	322,692	289,441	19,106,364

● Panado, Disprin and Grand-Pa have a 81% market penetration, with all the other brands making up 19% of the market.

SAMPLE FROM REPORT: LSM PROFILE

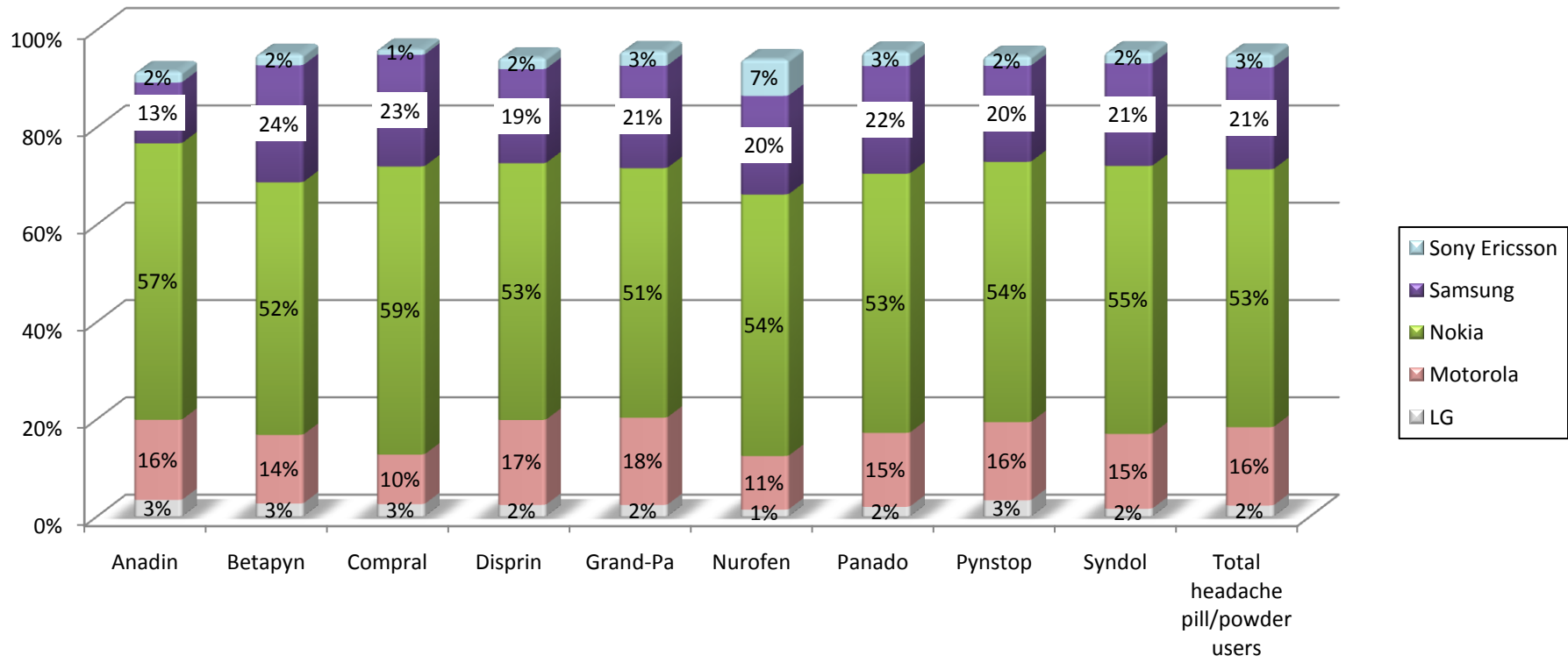
Profile of headache consumed most often by LSM



- 30% of Panado users are in LSM 9-10 compared to 55% of Nurofen users
- For Grand-Pa, the majority (56%) of the users are in LSM 1-6 compared to 25% of Syndol users

SAMPLE FROM REPORT: MAKE OF CELLPHONE

Make of cellphone by headache pill/powder brand



- Nokia was the leading cellphone make across all brand users
- Among Anadin users, only 13% had a Samsung cellphone compared to 23% among Compral users

SAMPLE FROM REPORT: TOP 3 MONTHLY MAGAZINES

Anadin	Percentage
True Love	9%
BONA	7%
Fairlady	5%

Betapyn	Percentage
True Love	9%
BONA	7%
SA Garden & Home	6%

Compral	Percentage
Men's Health	7%
COSMOPOLITAN	7%
True Love	6%

Disprin	Percentage
True Love	8%
BONA	6%
car	4%

Grand-Pa	Percentage
True Love	8%
BONA	7%
car	4%

Nurofen	Percentage
COSMOPOLITAN	15%
Fairlady	13%
O Magazine SA	11%

Panado	Percentage
True Love	7%
BONA	5%
Fairlady	5%

Pynstop	Percentage
SA Garden & Home	7%
Rooi Rose	6%
True Love	6%

Syndol	Percentage
Fairlady	6%
Sarie	5%
Rooi Rose	5%

Total users	Percentage
True Love	7%
Fairlady	6%
COSMOPOLITAN	6%

- True Love is the most popular magazine among total headache pills / powder users followed by Fairlady and Cosmopolitan
- Bona magazine is also a popular magazine among headache pill / powder users

Source: AMPS 2008B (Adults 16+)

Note: all figures are based on AMPS sample of Headache Pills/ Powders taken in the past 4 weeks; sample size: 12, 803 (see beginning of section for breakdown)

Note: all figures based on AMPS AIRS (average issue readership) totals

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 - 2.7. **Home Language:** English, isiZulu, isiXhosa, isiNdebele, Afrikaans, siSwati, Sepedi, Sesotho, Setswana, Tshivenda and Xitsonga
 - 2.8. **Province:** Western Cape; Northern Cape; Eastern Cape; KwaZulu-Natal; Free State; Mpumalanga; Gauteng; Limpopo; North West
 - 2.9. **Community Type:** Small towns, large/small villages; Cities and large towns; Metropolitan area; Settlements and rural
 - 2.10. **Work Status:** Unemployed; Retired; A student; Working Part-time; Working Full-time
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