

# SOUTH AFRICA BRAND REPORT

## – CONSUMERS OF ACNE AND SKIN BLEMISH PREPARATIONS –



**COMPILED: NOVEMBER 2010**

# REPORT OVERVIEW

**Compiled: November 2010  
(78 pages)**

This comprehensive report examines the South African acne and skin blemish preparations segment : historical market sales (past 5 years), sales forecasts until 2014, local consumer/market trends, competitor analysis of key brands in the segment, detailed consumer geo-demographic profiling, consumer lifestyle and media consumption.

The consumer analysis is based on the latest annual consumer survey among a nationally representative sample of more than 20,000 people - All Media and Products Survey conducted by the South African Advertising Research Foundation.

**Some of the key questions the report will help you to answer are:**

- What are the historical market sales and forecasts for the next 5 years?
- Who are the key players and brands in the market and how are they positioned?
- What are the important consumer and market trends that should be included in your business strategy?
- Who are the users (and non users) of acne and skin blemish preparations? e.g. age, gender, affluence, life-stage, geographics
- How do you engage with them? e.g. lifestyle, internet, sports, music interests
- What media do you use to communicate to them? e.g. TV, radio, newspapers, magazines

# REPORT OVERVIEW

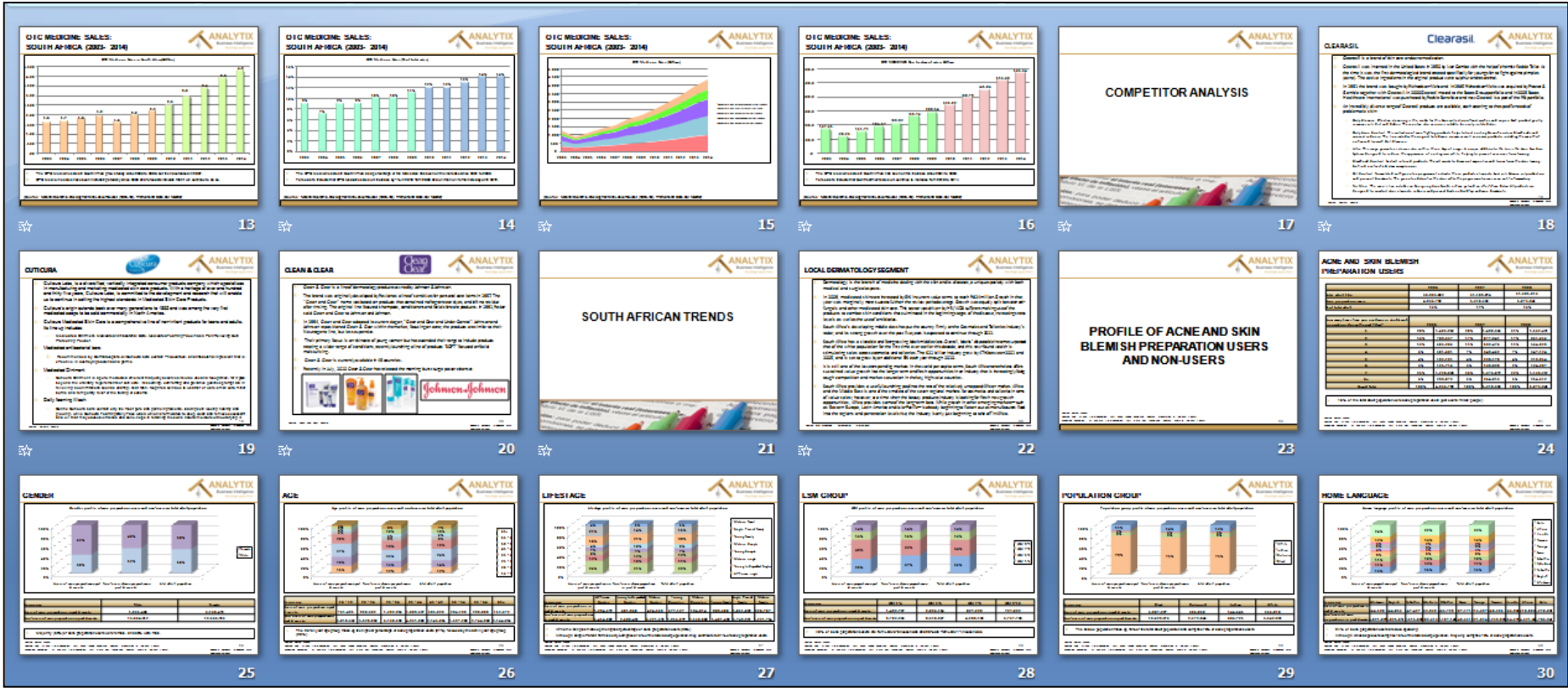
It provides a comprehensive consumer profile of the entire acne and skin blemish preparations segment (minimum category sample = 3383 consumers), as well as a detailed segmentation by brand, namely: **Clean & Clear, Clearasil, Cuticura, Gill and Oxy.**

It examines in detail the demographics, lifestyle, media consumption and cell phone and Internet usage of the entire acne and skin blemish preparations segment by brand, making it a vital reference report for anyone wanting to understand this segment of the market.

## Why purchase this market research reports?

- The report focuses on consumer-based intelligence – the most valuable brand asset
- Provides a comprehensive analysis of the “big picture” with local consumer/market trends
- Historical sales (past 5 years) and sales forecasts until 2014
- Includes a detailed competitor analysis and brand positioning
- 78 page report with 100+ charts, graphs, tables
- Salient points and key insights are highlighted and summarised in comment boxes on each page

# SCREENSHOTS FROM REPORT



The screenshots displayed are:

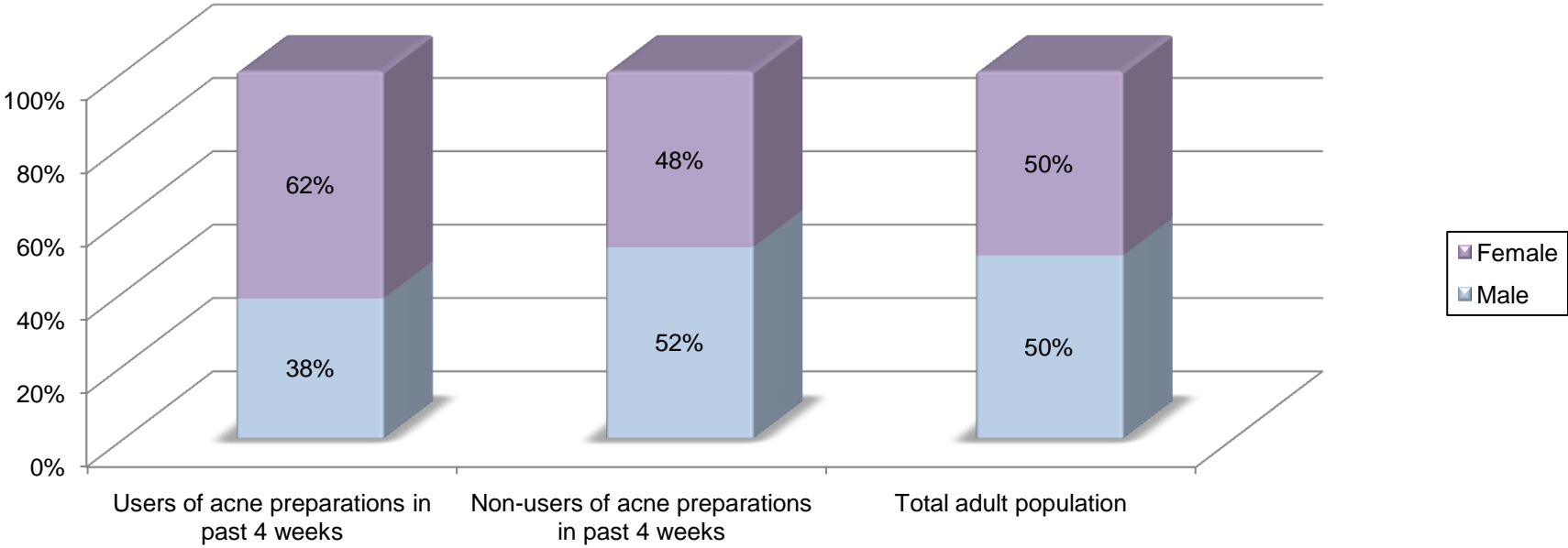
- 13: OTC MEDICINE SALES: SOUTH AFRICA (2003- 2014) - Bar chart showing sales over time.
- 14: OTC MEDICINE SALES: SOUTH AFRICA (2003- 2014) - Bar chart showing sales over time.
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- 16: OTC MEDICINE SALES: SOUTH AFRICA (2003- 2014) - Bar chart showing sales over time.
- 17: COMPETITOR ANALYSIS - Text-based analysis of competitors.
- 18: CLEARASIL - Text-based analysis of Clearasil products.
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- 21: SOUTH AFRICAN TRENDS - Text-based analysis of trends in South Africa.
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- 26: AGE - Bar chart showing age distribution.
- 27: LIFESTAGE - Bar chart showing life stage distribution.
- 28: LSM GROUP - Bar chart showing LSM group distribution.
- 29: POPULATION GROUP - Bar chart showing population group distribution.
- 30: HOME LANGUAGE - Bar chart showing home language distribution.

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

# SAMPLE FROM REPORT

## GENDER PROFILE

Gender profile of acne preparations users and non-users vs. total adult population



Frequency	Male	Female
Users of acne preparations in past 4 weeks	1,935,468	3,138,473
Non-users of acne preparations in past 4 weeks	13,664,312	12,566,763

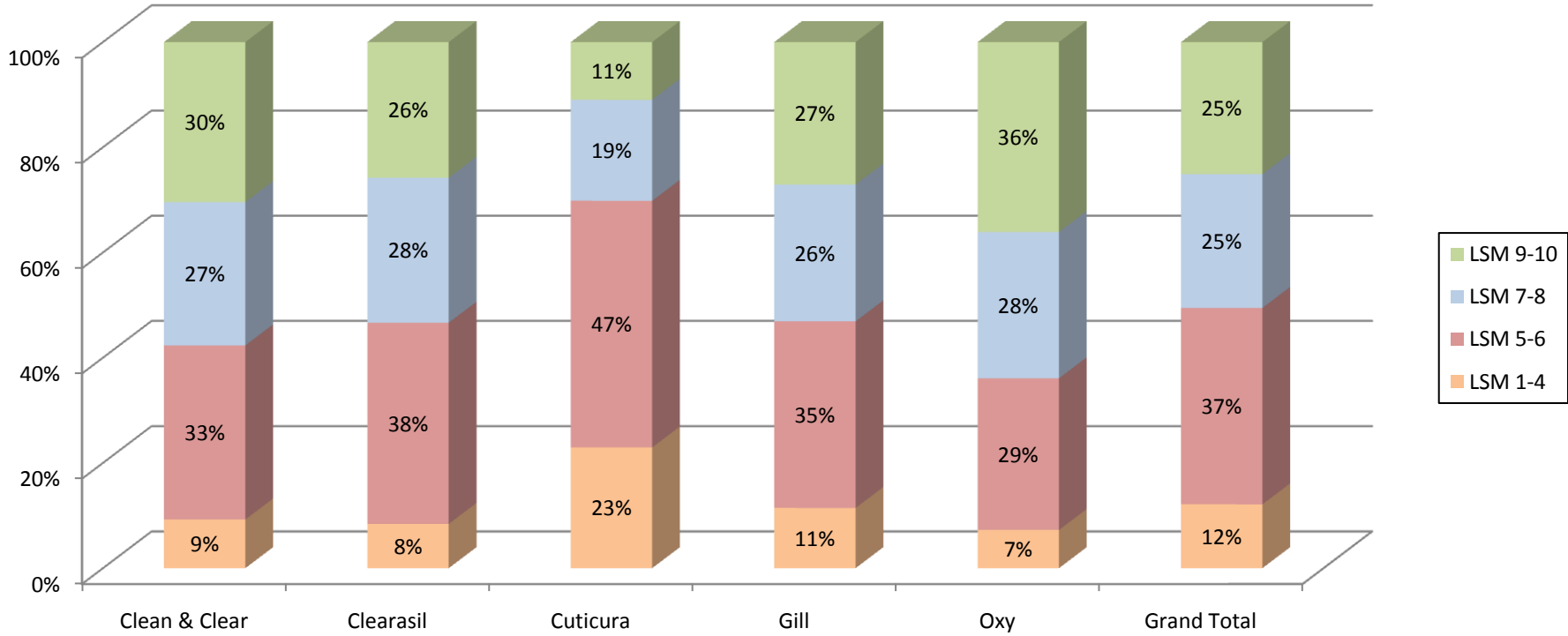
● The majority (62%) of acne preparation users were female, and 38% were male.

Source: AMPS 2008B  
 Sample Size: 21 083 (total population 16+); 3383 (Used acne/skin blemish preparation in the past 7 days)  
 Weighted Population: 31 305 016 (total population 16+); 5 073 941 (Acne/Skin blemish users in the past 7 days)

# SAMPLE FROM REPORT

## BRAND PROFILE: LSM

Profile of acne preparations consumed most often by LSM



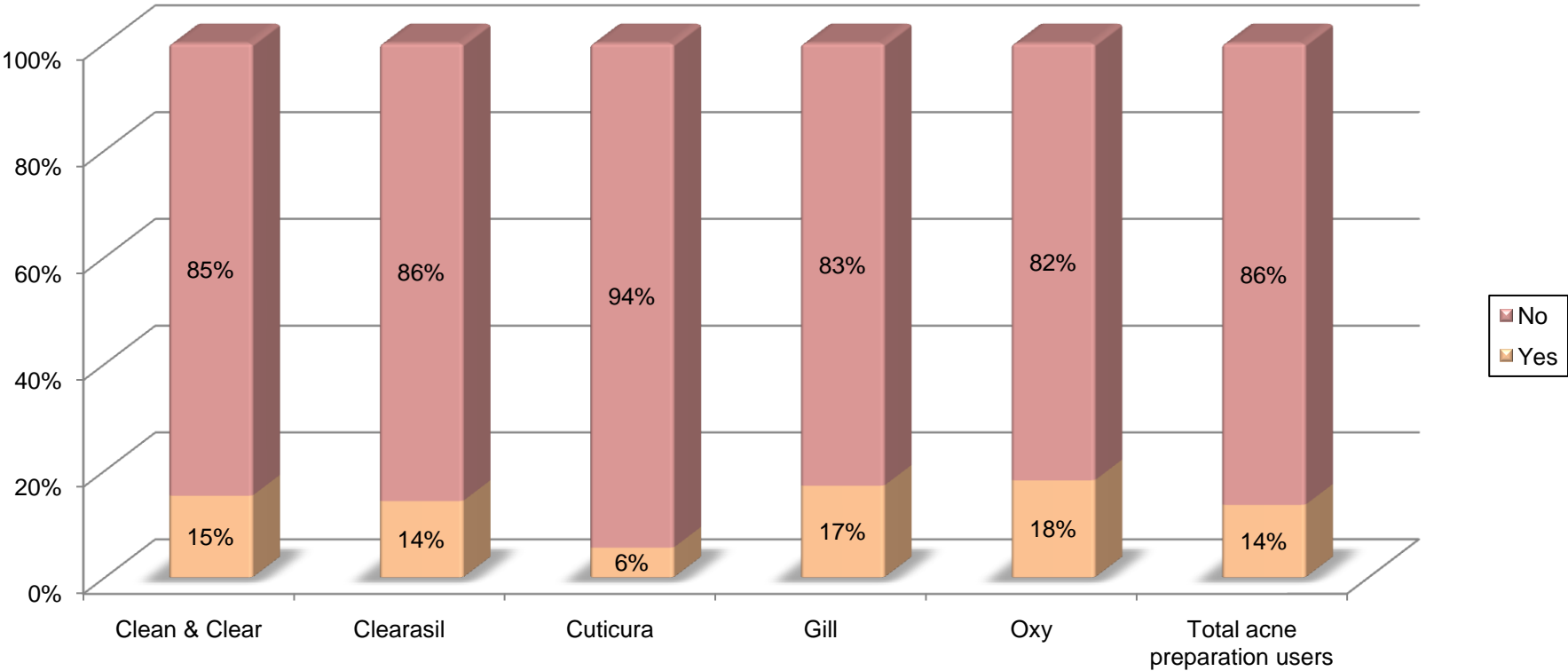
- Among all brands except Oxy, LSM 5-6 users comprised the highest percentage.
- LSM 9-10 users comprised 36% of Oxy users.

Source: AMPS 2008B  
 Sample Sizes : 3 383 (Users of Acne/Skin blemish preparation in past 7 days)  
 \*Note: All figures are based on respondent observation numbers

# SAMPLE FROM REPORT

## INTERNET ACCESS

Accessed the Internet in the past 7 days by acne preparation brand



● Internet access was highest among Oxy (18%) and Gill (17%) users.

Source: AMPS 2008B  
Sample Sizes : 3 383 (Users of Acne/Skin blemish preparation in past 7 days)  
\*Note: All figures are based on respondent observation numbers

# TOP 3 MONTHLY MAGAZINES

Clean & Clear	Percentage
True Love	15%
COSMOPOLITAN	9%
BONA	8%

Clearasil	Percentage
True Love	9%
Men's Health	7%
BONA	7%

Cuticura	Percentage
True Love	11%
BONA	11%
Amakhosi	5%

Gill	Percentage
True Love	7%
Speed & Sound	7%
Men's Health	7%

Oxy	Percentage
car	9%
True Love	8%
Men's Health	8%

Total users	Percentage
True Love	10%
BONA	8%
COSMOPOLITAN	6%

- True Love, BONA and Cosmopolitan were the Top 3 Monthly Magazines among total users.
- Among Oxy users, Car (9%), True Love (8%) and Men's Health (8%) were most popular.

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- For all projects, the **senior exec team are involved hands-on** from project and questionnaire design through to analysis and presentation
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Dr. Sheena Mathew completed her MB BCH at the University of the Witwatersrand and has gained considerable experience in both the public and private sectors. She has done considerable work as a general practitioner in the private sector, while her time in the public sector focused mainly on paediatrics, HIV in paediatrics and rehabilitation. Her interest in natural healthcare led her to do a diploma in Ayurveda, in India. Her work experience also extends internationally, having worked at the Private Hospitals in the UK.

She is currently studying for a Masters in Public Health at the University of Cape Town and brings a wealth of knowledge to any market research and medical research projects in the healthcare industry.