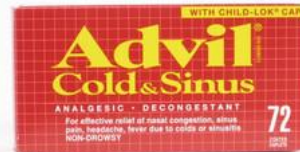


# SOUTH AFRICA BRAND REPORT

## – CONSUMERS OF COUGH, COLD & FLU REMEDIES –



**COMPILED: NOVEMBER 2010**

# REPORT OVERVIEW

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

This comprehensive report examines the South African cough, cold and flu remedy 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 cough, cold and flu remedies? 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

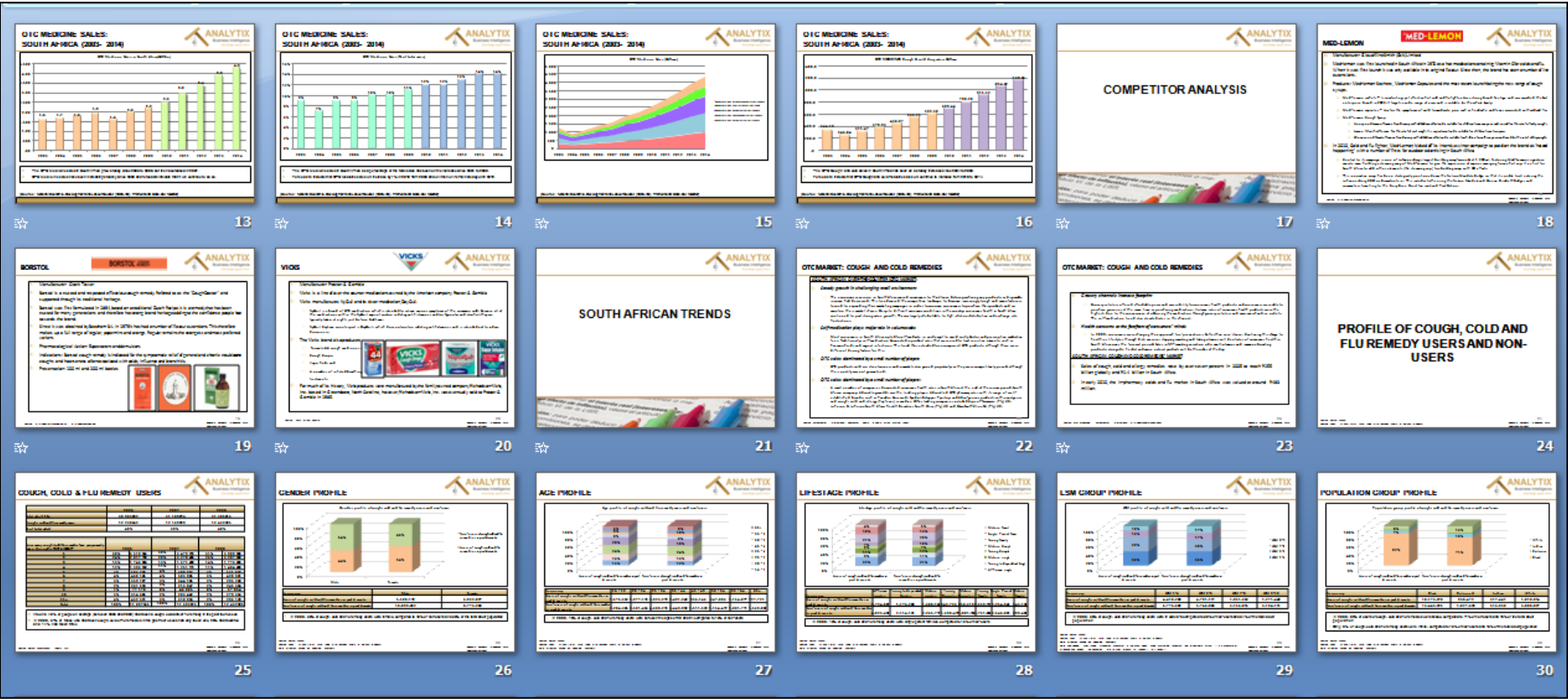
It provides a comprehensive consumer profile of the entire cough, cold and flu remedy segment (minimum category sample = 7614 consumers), as well as a detailed segmentation by brand, namely: **Advil CS; Alcophyllex; Benylin; Borstol; Chamberlain's; Corenza C; LCC; Lennon; Med-Lemon; Vicks; Woods.**

It examines in detail the demographics, lifestyle, media consumption and cell phone and Internet usage of the cough, cold and flu remedy 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
- 83 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



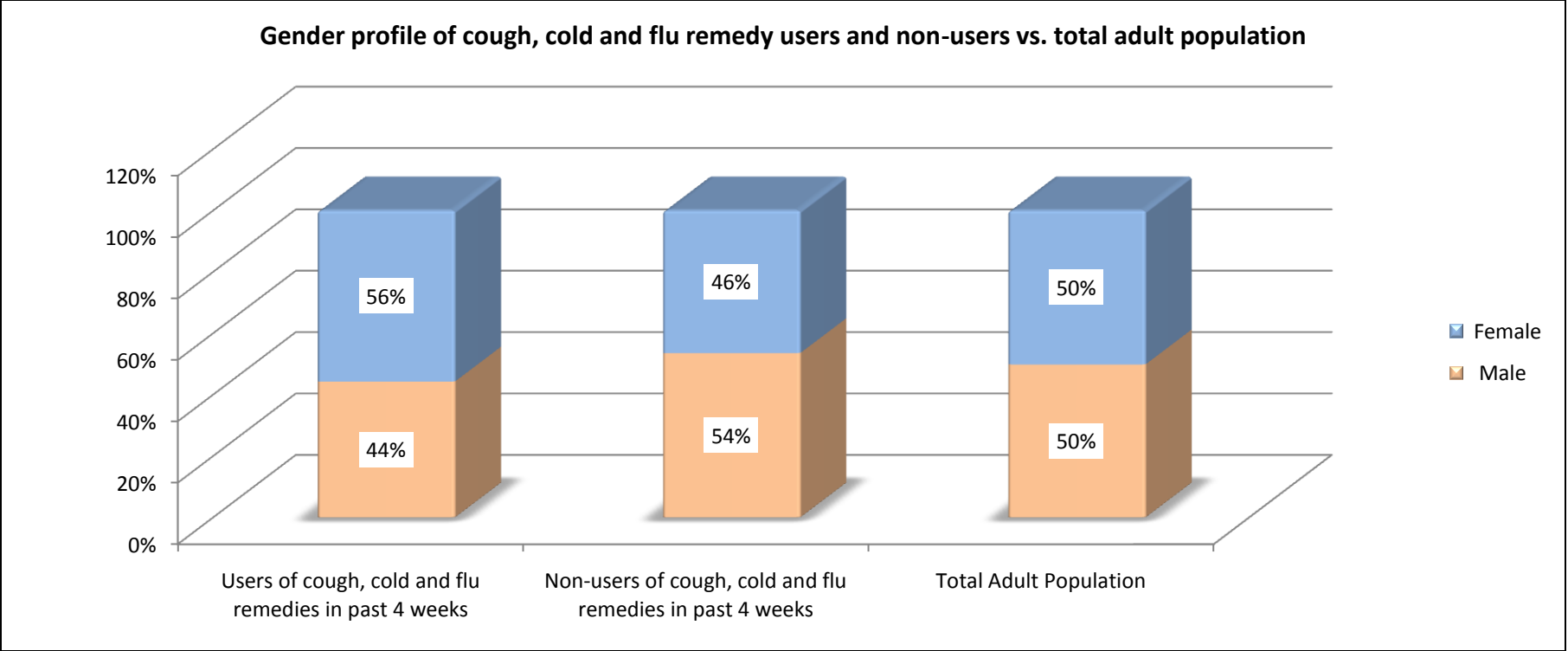
The screenshots displayed are:

- 13: OTC MEDICINE SALES: SOUTH AFRICA (2003- 2014) - Bar chart showing sales from 2003 to 2014.
- 14: OTC MEDICINE SALES: SOUTH AFRICA (2003- 2014) - Bar chart showing sales from 2003 to 2014.
- 15: OTC MEDICINE SALES: SOUTH AFRICA (2003- 2014) - Stacked area chart showing sales from 2003 to 2014.
- 16: OTC MEDICINE SALES: SOUTH AFRICA (2003- 2014) - Bar chart showing sales from 2003 to 2014.
- 17: COMPETITOR ANALYSIS - Text-based analysis slide.
- 18: MED-LEMON - Text-based analysis slide.
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- 23: OTC MARKET: COUGH AND COLD REMEDIES - Text-based analysis slide.
- 24: PROFILE OF COUGH, COLD AND FLU REMEDY USERS AND NON-USERS - Text-based analysis slide.
- 25: COUGH, COLD & FLU REMEDY ISSUES - Table with columns for issues and percentages.
- 26: GENDER PROFILE - 3D bar chart showing gender distribution.
- 27: AGE PROFILE - 3D bar chart showing age distribution.
- 28: LIFESTAGE PROFILE - 3D bar chart showing life stage distribution.
- 29: LSM GROUP PROFILE - 3D bar chart showing LSM group distribution.
- 30: POPULATION GROUP PROFILE - 3D bar chart showing population group distribution.

**83 page report with 80+ charts, graphs, tables and insights**

# SAMPLE FROM REPORT

## GENDER USAGE



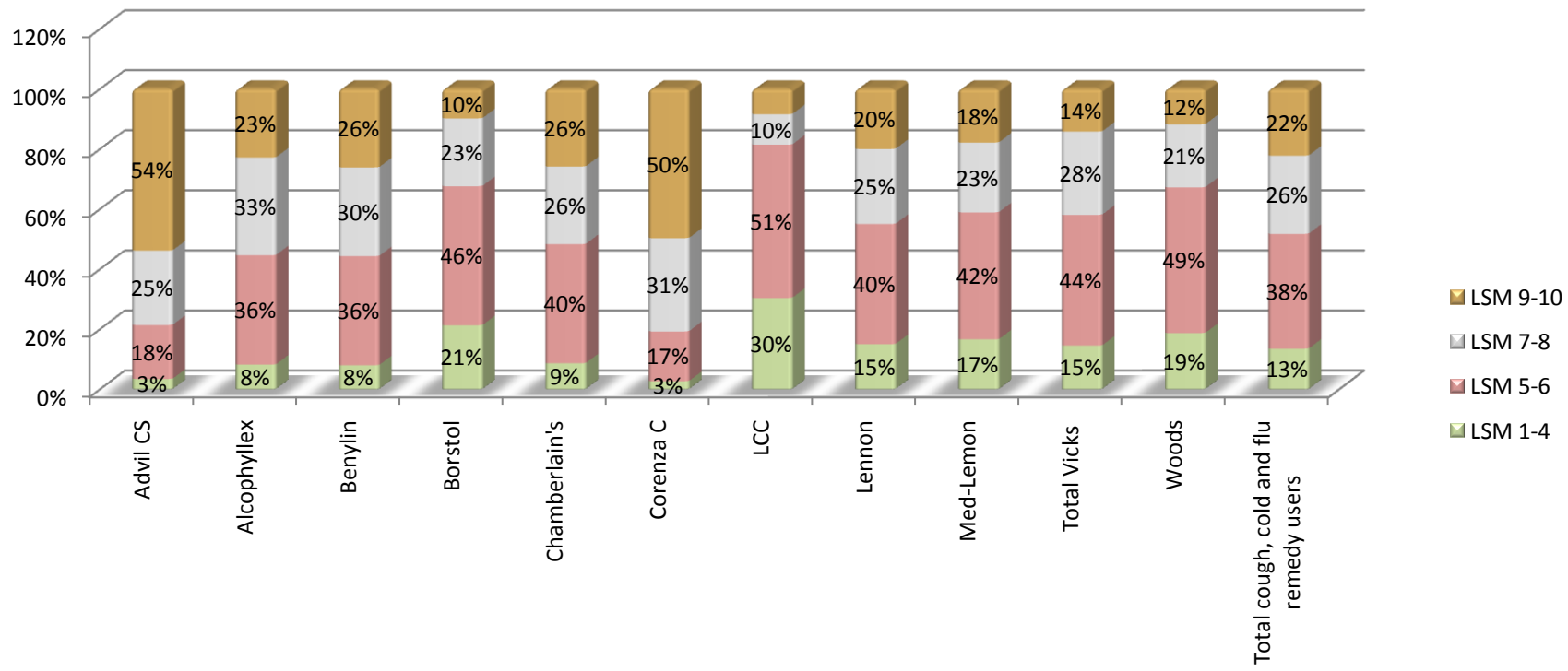
● In 2008, 56% of cough, cold and flu remedy users were female, compared to 46% of non-users and 50% of the total adult population

Source: AMPS 2008B  
 Sample Sizes : 21 083 (total); 7614 (Cold & flu remedy users in the past 4 weeks)  
 Note: all figures based on weighted numbers

# SAMPLE FROM REPORT

## BRAND PROFILE: LSM

LSM profile of cough, cold and flu remedy brands



- In 2008, 54% of Advil users and 50% of Corenza C users were in LSM 9-10
- 51% of LCC users and 49% of Woods users were in LSM 5-6

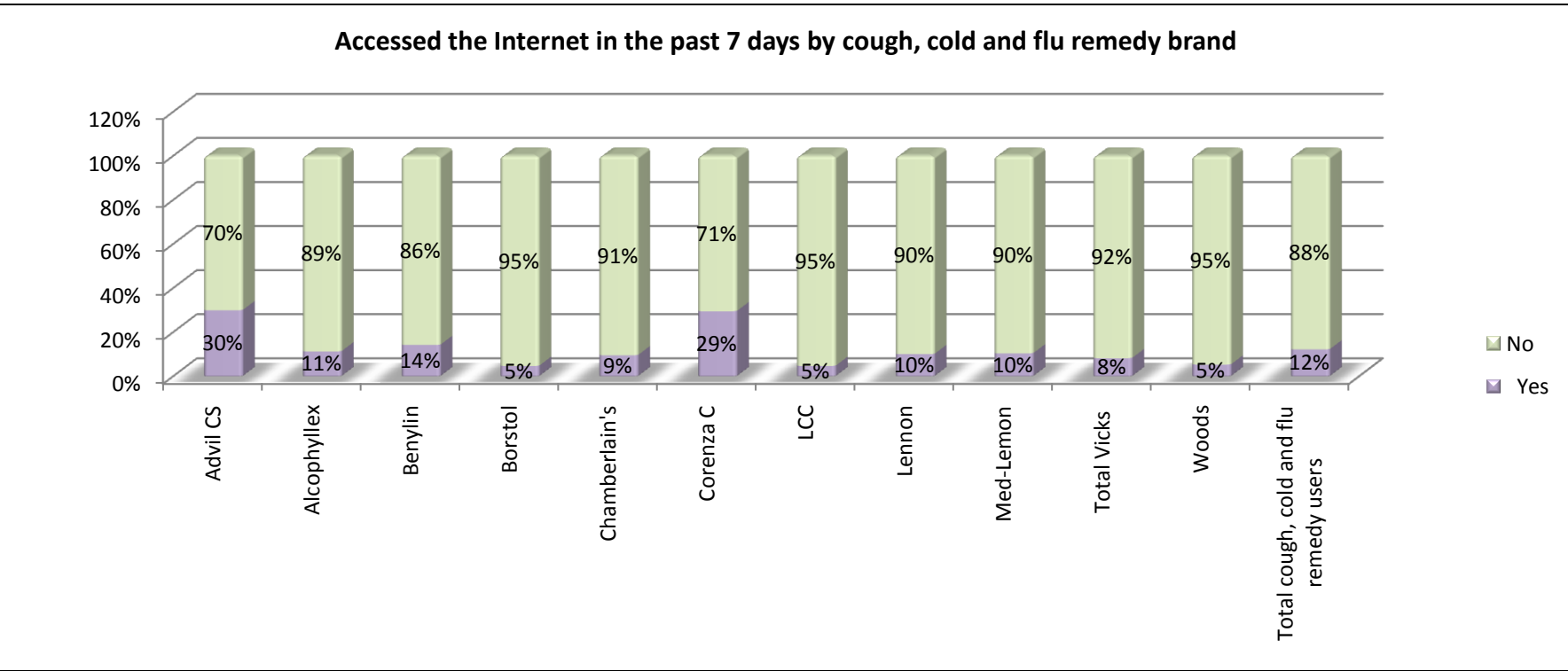
Source: AMPS 2008B (Adults 16+)

Note: all figures are based on AMPS sample of cough, cold and flu remedy users; sample size: 7614 (see beginning of section for breakdown)

Note: The SAARF LSM (Living Standards Measure) is the most widely used marketing research tool in Southern Africa. It is a measure of affluence and divides the population into 10 LSM groups, 10 (highest) to 1 (lowest).

# SAMPLE FROM REPORT

## INTERNET ACCESS



- In 2008, 30% of Advil CS users and 29% of Corenza C users had accessed the Internet in the past seven days
- Only 5% of Borstol, LCC and Woods users had accessed the Internet in the past seven days

Source: AMPS 2008B (Adults 16+)

Note: all figures are based on AMPS sample of cough, cold and flu remedy users; sample size: 7614 (see beginning of section for breakdown)

# SAMPLE FROM REPORT

## TOP 3 NEWSPAPERS



Advil CS	Percentage
The Star	9%
Daily Sun	9%
The Citizen	9%

Alcophyllex	Percentage
Daily Sun	22%
Sowetan	7%
The Star	5%

Benylin	Percentage
Daily Sun	20%
Sowetan	7%
The Star	6%

Borstol	Percentage
Daily Sun	23%
Sowetan	8%
The Star	4%

Chamberlain's	Percentage
Daily Sun	16%
Beeld	7%
The Star	6%

Corenza C	Percentage
Daily Sun	13%
The Star	8%
Sowetan	6%

LCC	Percentage
Daily Sun	25%
Sowetan	11%
The Star	5%

Lennon	Percentage
Daily Sun	23%
The Star	9%
Sowetan	7%

Med-Lemon	Percentage
Daily Sun	19%
Sowetan	7%
The Star	4%

Total Vicks	Percentage
Daily Sun	17%
Sowetan	6%
The Star	4%

Woods	Percentage
Daily Sun	24%
Sowetan	8%
The Star	3%

Total users	Percentage
Daily Sun	19%
Sowetan	7%
The Star	5%

- The Daily Sun, the Sowetan and the Star are the most popular daily newspapers amongst cough, cold and flu remedy users
- The Daily Sun is most popular amongst LCC users, with almost a 25% readership

Source: AMPS 2008B (Adults 16+)

Note: all figures are based on AMPS sample of cough, cold and flu remedy users; sample size: 7614 (see beginning of section for breakdown)

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

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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
- Our smaller team allows us to provide significantly **more affordable solutions and rapid turnaround times** compared to our larger competitors
- We provide innovative, **customised market research solutions** based on consumer-centric healthcare information and knowledge
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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.