

SOUTH AFRICA BRAND REPORT

– CONSUMERS OF HEALING OINTMENT –



COMPILED: NOVEMBER 2010

REPORT OVERVIEW

Compiled: November 2010
(78 pages)

This comprehensive report examines the South African Healing Ointment 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 healing ointments? 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 healing ointment segment (minimum category sample = 12,803 consumers), as well as a detailed segmentation by brand, namely: **Deep Heat, Fastum, Nurofen, Reparil-Gel, Vicks, Voltaren, Zam - Buk.**

It examines in detail the demographics, lifestyle, media consumption and cell phone and Internet usage of the healing ointment 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

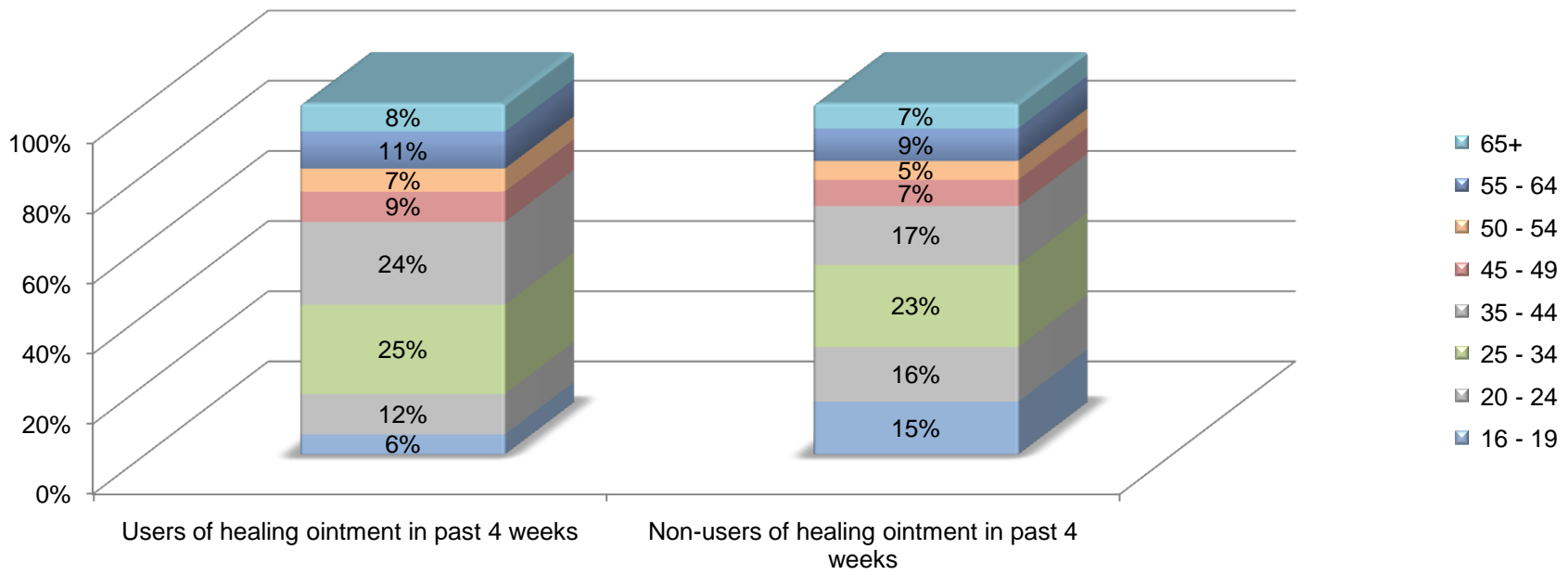
SCREENSHOTS FROM REPORT

78 page report with 80+ charts, graphs, tables and insights

SAMPLE FROM REPORT

AGE PROFILE

Age profile of healing ointment users and non-users vs. total adult population



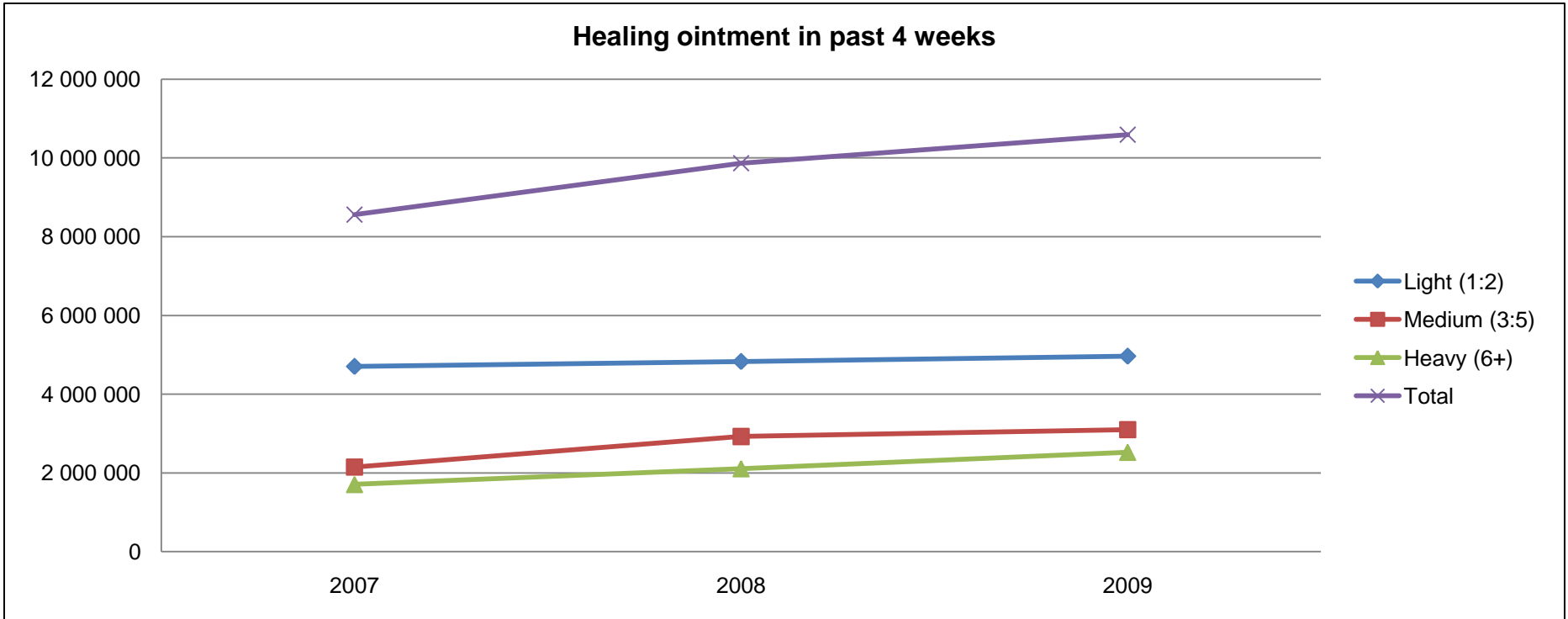
Frequency	16 - 19	20 - 24	25 - 34	35 - 44	45 - 49	50 - 54	55 - 64	65+
Users of healing ointment in past 4 weeks	559,847	1,137,901	2,507,358	2,333,485	850,174	647,317	1,041,436	786,077
Non-users of healing ointment in past 4 weeks	3,220,011	3,340,731	5,016,197	3,607,761	1,597,501	1,154,161	1,994,412	1,510,648

● 49% of users of healing ointment were aged 25 – 44 years old compared to 40% of non-users

Source: AMPS 2008B
 Sample Size: 21 083 (total population 16+); 6 823 (Purchased healing ointment in the past 4 weeks)
 Weighted Population: 31 305 016 (total population 16+); 9 863 595 (Healing ointment users in the past 4 weeks)

SAMPLE FROM REPORT

CONSUMPTION FREQUENCY



Year	Light (1:2)	Medium (3:5)	Heavy (6+)	Total
2007	4 704 239	2 147 336	1 708 204	8 559 779
2008	4 829 930	2 924 427	2 109 238	9 863 595
2009	4 966 498	3 098 425	2 526 378	10 591 301

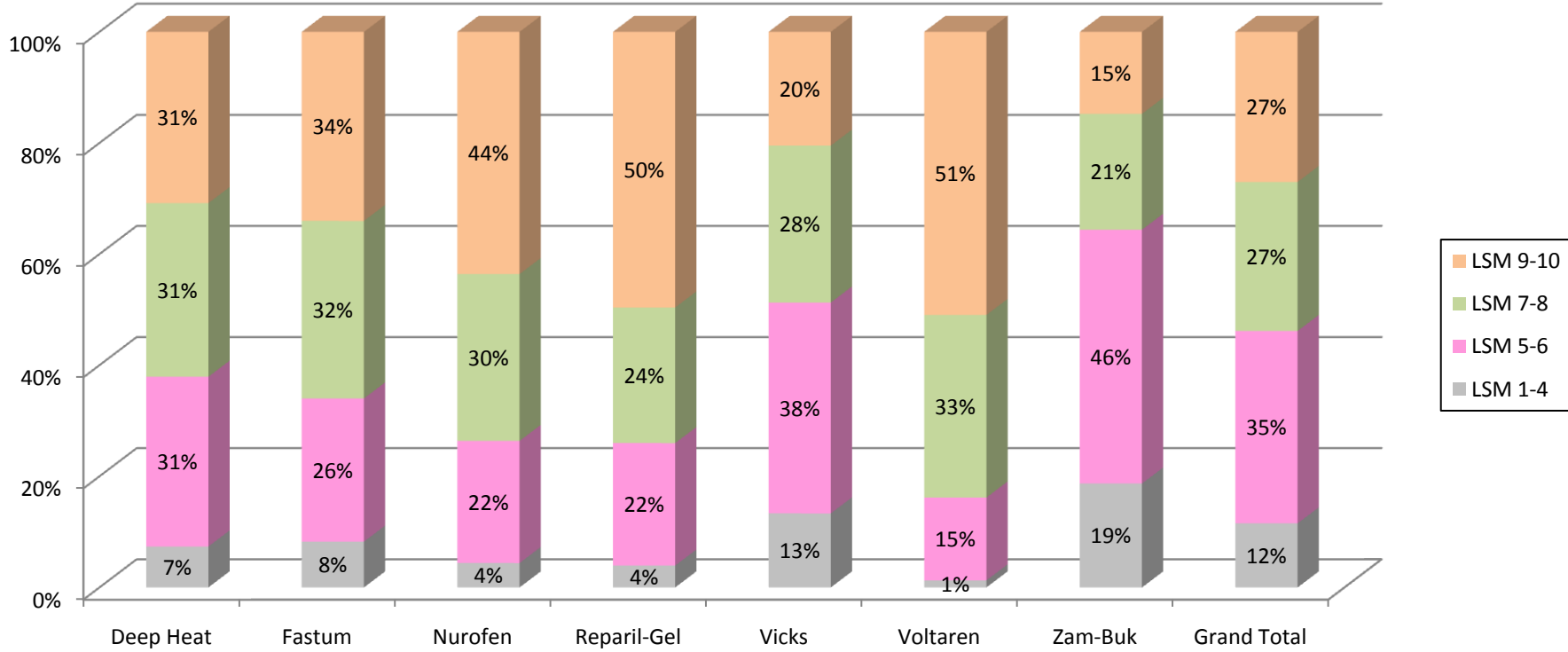
● The greatest increase in usage among healing ointment users was among medium users (3 – 5 ointments in the past 6 months), from 2.1 million users in 2007 to 2.9 million users in 2008 and 3.1 million users in 2009.

Source: AMPS 2008B
 Sample Size: 21 083 (total population 16+); 6 823 (Purchased healing ointment in the past 4 weeks)
 Weighted Population: 31 305 016 (total population 16+); 9 863 595 (Healing ointment users in the past 4 weeks)

SAMPLE FROM REPORT

BRAND PROFILE: LSM

Profile of healing ointment consumed most often by LSM



- 46% of Zam-Buk users were LSM 5-6 compared to 15% of Voltaren users
- 50% of Reparil-Gel users were in LSM 9-10

Source: AMPS 2008B
 Sample Sizes : 6 823 (Users of healing ointments in past 4 weeks)
 *Note: All figures are based on respondent observation numbers

SAMPLE FROM REPORT

TOP 3 MONTHLY MAGAZINES



Deep Heat	Percentage
True Love	6%
Men's Health	6%
COSMOPOLITAN	5%

Fastum	Percentage
COSMOPOLITAN	9%
Top Billing Magazine	7%
Rooi Rose	7%

Nurofen	Percentage
Fairlady	11%
True Love	11%
COSMOPOLITAN	10%

Reparil-Gel	Percentage
Fairlady	9%
COSMOPOLITAN	9%
SA Garden and Home	8%

Vicks	Percentage
True Love	7%
Fairlady	5%
BONA	4%

Voltaren	Percentage
SA Garden and Home	8%
Rooi Rose	7%
COSMOPOLITAN	7%

Zam-Buk	Percentage
True Love	10%
BONA	9%
Amakhosi	5%

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

- The most popular monthly magazine among all healing ointment users are Cosmopolitan (7%) and True Love (7%)
- Among Zam-Buk users, the most popular monthly magazine is True Love (10%) followed by Bona (9%) and Amakosi (5%)
- The most popular monthly magazines among Deep Heat users are True Love (6%) and Men's Health (6%)

Source: AMPS 2008B (Adults 16+)

Note: all figures are based on AMPS sample of healing ointment bought last 6 months (6823)(see beginning of section for breakdown)

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

TABLE OF CONTENTS

1. SA Population Demographic Overview

- 1.1. **South Africa at a Glance:** Size, Population, GDP, Gini Coefficient, Life Expectancy, Human Development Index, Top exports and import goods, Top trading partners
- 1.2. **SA Gender profile:** 1996, 2001, 2007
- 1.3. **SA Age profile:** 1996, 2001, 2007
- 1.4. **SA Age and Gender Population pyramids:** 1996, 2001, 2007

2. Historical Sales and Forecasts

- 2.1. **OTC Medicine Sales in South-Africa:** 2003-2009 (Actual sales); 2010-2014 (Forecasts)
- 2.2. **OTC Medicine Sales as a percentage of total sales in South Africa:** 2003-2009 (Actual sales); 2010-2014 (Forecasts)
- 2.3. **OTC Medicine Sales by category: Vitamin and Minerals; Skin Treatment; Analgesics, Cough and Cold; Digestives:** 2003-2009 (Actual sales); 2010-2014 (Forecasts)
- 2.4. **Analgesics Sales in South Africa:** 2003-2009 (Actual sales); 2010-2014 (Forecasts)

3. Competitor Analysis and Healing Ointment Market /Consumer Trends

- 3.1. **Competitor Analysis: Top 3 Healing Ointment Brands:** Zam-Buk; Deep Heat; Vicks
- 3.2. **South African Analgesic Industry:** Overview of the South African OTC, Analgesic and healing ointment market

TABLE OF CONTENTS

4. Profile of Healing Ointment Remedy Users and Non-Users

- 4.1. **Healing Ointment Remedy Users:** Overview: Total adult population (2007-2009)
- 4.2. **Gender:** Male; Female
- 4.3. **Age:** 16-19; 20-24, 25-34, 35-44, 45-49, 50-54, 55-64, 65+
- 4.4. **Lifestage:** At home singles; Starting-out singles; Couples; Parents; Single parents
- 4.5. **LSM Group:** 1-4; 5-6; 7-8; 9-10
- 4.6. **Population Group:** Black; White; Coloured; Indian
- 4.7. **Home Language:** English, isiZulu, isiXhosa, isiNdebele, Afrikaans, siSwati, Sepedi, Sesotho, Setswana, Tshivenda and Xitsonga
- 4.8. **Province:** Western Cape; Northern Cape; Eastern Cape; KwaZulu-Natal; Free State; Mpumalanga; Gauteng; Limpopo; North West
- 4.9. **Community Type:** Settlements and Non-Urban areas, Small Towns and Villages, Cities and Large Towns , Metropolitan Areas

TABLE OF CONTENTS

5. Market Trends

- 5.1. **Consumer Trends 2007-2009: LSM:** 1-4; 5-6; 7-8; 9-10
- 5.2. **Consumption Frequency: 2007 – 2009:** High, Medium, Low

6. Brand Profile and Brand Penetration (2009): Deep Heat, Fastum, Nurofen, Reparil-Gel, Vicks, Voltaren, Zam - Buk

- 6.1. **Gender Profile:** Brand and brand penetration of each brand by gender
- 6.2. **Age Profile:** Brand Profile and brand penetration of each brand by age
- 6.3. **Lifestage Profile:** Brand profile and brand penetration of each brand by lifestage
- 6.4. **LSM Profile:** Brand profile and brand penetration of each brand by LSM group
- 6.5. **Population Group:** Brand profile and brand penetration of each brand by population group
- 6.6. **Home Language:** Brand Profile ad brand penetration of each brand by home language
- 6.7. **Province Profile:** Brand Profile and brand penetration of each brand by province
- 6.8. **Community Profile:** Brand Profile and brand penetration of each brand by community
- 6.9. **Consumption Frequency:** LSM Profile and penetration :usage: High, Medium, Low
- 6.10. **Consumption Frequency:** Population Group Profile and penetration :usage: High, Medium, Low

TABLE OF CONTENTS

7. Lifestyle (2009): Deep Heat, Fastum, Nurofen, Reparil-Gel, Vicks, Voltaren, Zam - Buk

- 7.1. **Cellphone Ownership:** Cellphone ownership by brand
- 7.2. **Payment Mechanism:** Payment Mechanism brand
- 7.3. **Make of Cellphone:** Cellphone brands by segment brand
- 7.4. **Cellular Network Provider:** Cellular network provider by brand
- 7.5. **PC and Laptop Ownership:** Ownership of PC and Laptop by brand
- 7.6. **Internet Access (Past 7 Days):** Internet access in past seven days by brand
- 7.8. **Financial Institutions:** Financial institutions by brand
- 7.9. **Sports Interests:** Sports interested in by selected brand
- 7.10. **Sports Participation:** Sports participated in by selected brand
- 7.11. **Favourite Music:** Favourite music types by selected brand
- 7.12. **Frequency of cinema visits:** Frequency of cinema visits in average four weeks by brand

8. Media (2009): Deep Heat, Fastum, Nurofen, Reparil-Gel, Vicks, Voltaren, Zam - Buk

- 8.1. **Newspaper readership:** Top three daily and weekly newspapers by brand
- 8.2. **Magazine readership:** Top three weekly and monthly magazines by brand
- 8.3. **Free Magazine readership:** Top three “free” magazine readership by brand
- 8.4. **TV channels:** Top three TV channels by brand
- 8.5. **TV channels via DStv:** Top three TV channels via DStv by brand
- 8.6. **Radio Stations:** Top three radio stations by brand

ANALYTIX HEALTHCARE EXPERTISE

- We have a **cross-functional team of senior-level experts** (medical practitioner, pharmaceutical, marketing and market research) that ensures in-depth consumer understanding and relevant industry insights are delivered
- 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
- We have **partnered with other healthcare service providers** e.g. MEDpages to provide accurate and up-to-date industry information
- Companies benefit from our **level 3 B-BBEE certification** which allows for procurement recognition of 110%



ORDERING FORM

ORDERING INSTRUCTIONS

(1.) Complete the order form & fax back to 086 671-2165 or email to info@analytixbi.com (2.) An invoice will be generated and e-mailed (3.) The report will be emailed in PDF format upon receipt of payment or when proof of payment has been provided (4.) All prices exclude 14 % VAT

COMPANY DETAILS

Company Name:			
Postal Address:			
Town/City:		Postal Code:	
Tel Number:		Fax Number:	
Your email address:		Billing email:	
Your name:		VAT number:	

CONFIRMATION: I/we wish to order this publication (please tick)

Title of Publication	Total Ex Vat	<input type="checkbox"/>
South Africa Brand Report: Consumers of Healing Ointment	R9,000	<input type="checkbox"/>

ACKNOWLEDGEMENT

I am authorised to order this publication on behalf of the company and agree to the payment terms.

Client (Print Name)

Signature

Capacity

Date

CONTACT DETAILS

CAPE TOWN

Telephone: +27 (0) 21 551 7066
Fax: +27 (0) 86 671 2165

Physical Address: Unit B16
Century Square
Heron Crescent
Century City
7441
Cape Town
Western Cape
South Africa

Website: www.analytixbi.com

Contact: **Dr. Sheena Mathew** (MB BCH, WITS)

Email: sheena@analytixbi.com

Mobile: +27 (0) 82 941-9207

JOHANNESBURG

Telephone: +27 (0) 11 258 8731
Fax: +27 (0) 11 258 8511

Physical Address: Country Club Estate
Building 2
Woodlands Drive,
Woodmead
2052
Johannesburg
Gauteng
South Africa

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.