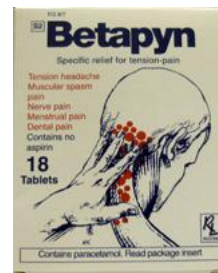


SOUTH AFRICA BRAND REPORT

– CONSUMERS OF HEADACHE PILLS/POWDERS –



COMPILED: NOVEMBER 2010

REPORT OVERVIEW

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

This comprehensive report examines the South African headache OTC 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 headache tablets/powders? 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

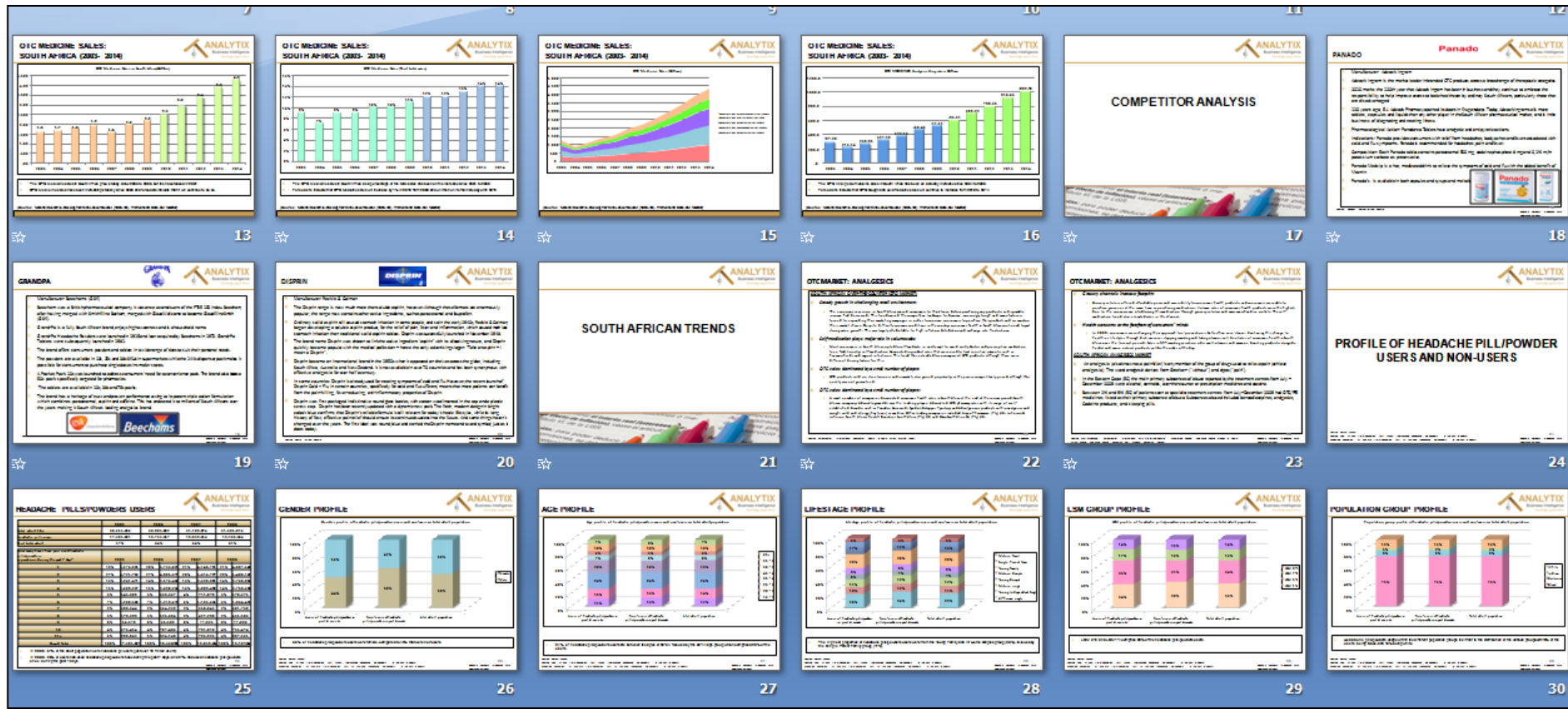
It provides a comprehensive consumer profile of the entire headache OTC segment (minimum category sample = 12,803 consumers), as well as a detailed segmentation by brand, namely: **Anadin, Betapyn, Compral, Disprin, Grand-Pa, Nurofen, Panado, Pynstop, Syndol.**

It examines in detail the demographics, lifestyle, media consumption and cell phone and Internet usage of the headache pills/powders 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
- 81 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:

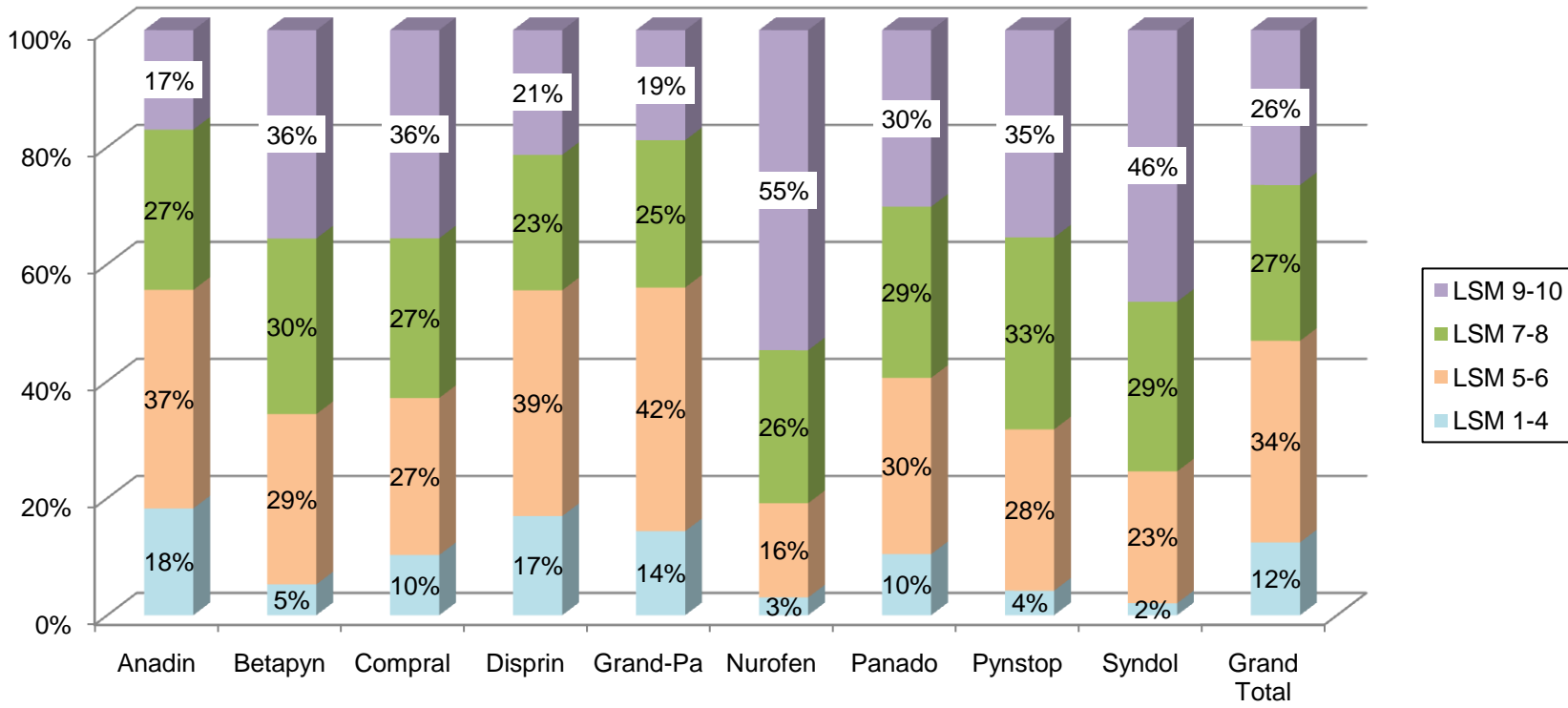
- 13: OTC MEDICINE SALES: SOUTH AFRICA (2003- 2014) - Bar chart showing sales from 2003 to 2014.
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- 17: COMPETITOR ANALYSIS - Text-based analysis of competitors.
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- 26: GENDER PROFILE - Stacked bar chart showing gender distribution.
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81 page report with 100+ charts, graphs, tables and insights

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

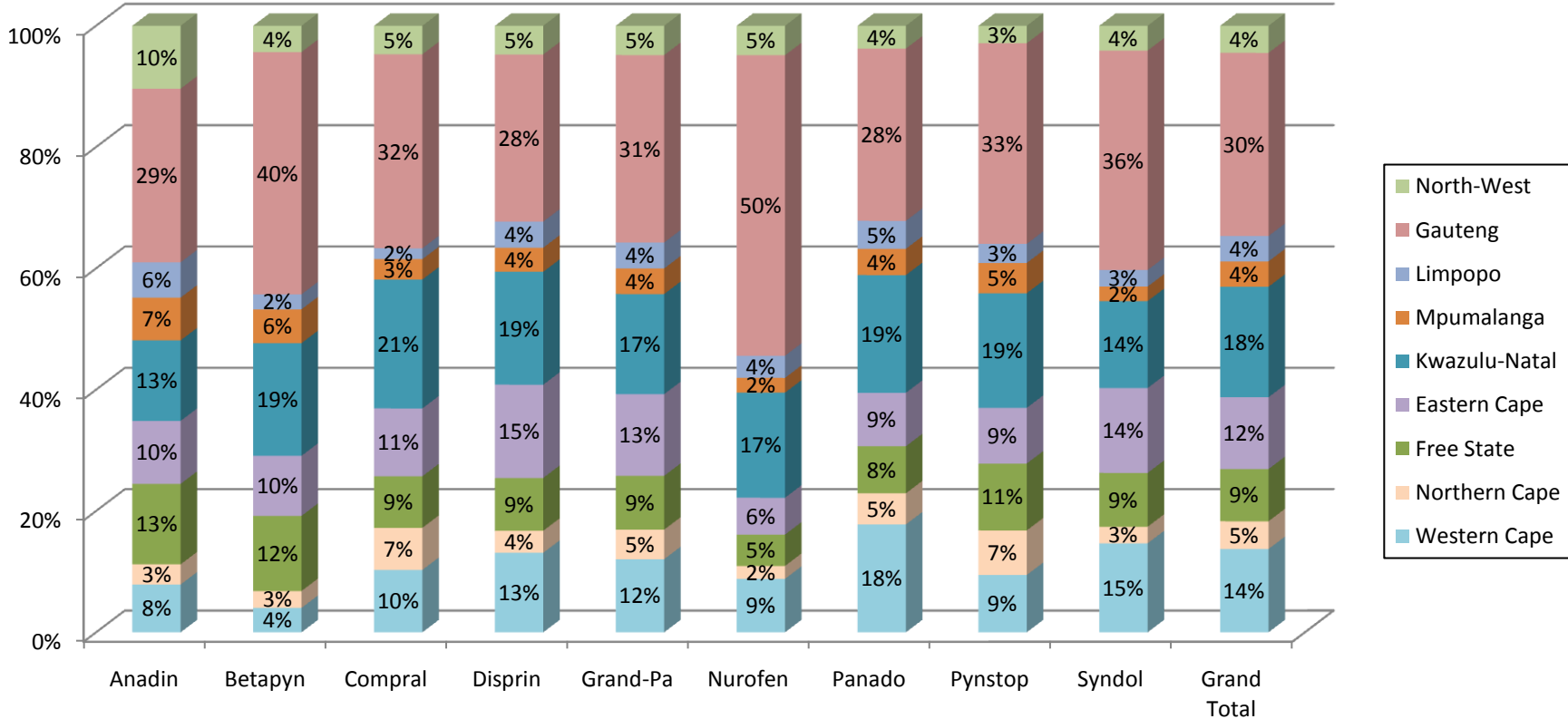
Source: AMPS 2008B (Adults 16+)

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)

SAMPLE FROM REPORT

BRAND PROFILE: PROVINCE

Profile of headache consumed most often by province



● Although all brands show high consumption in Gauteng, 50% of Nurofen users live in Gauteng

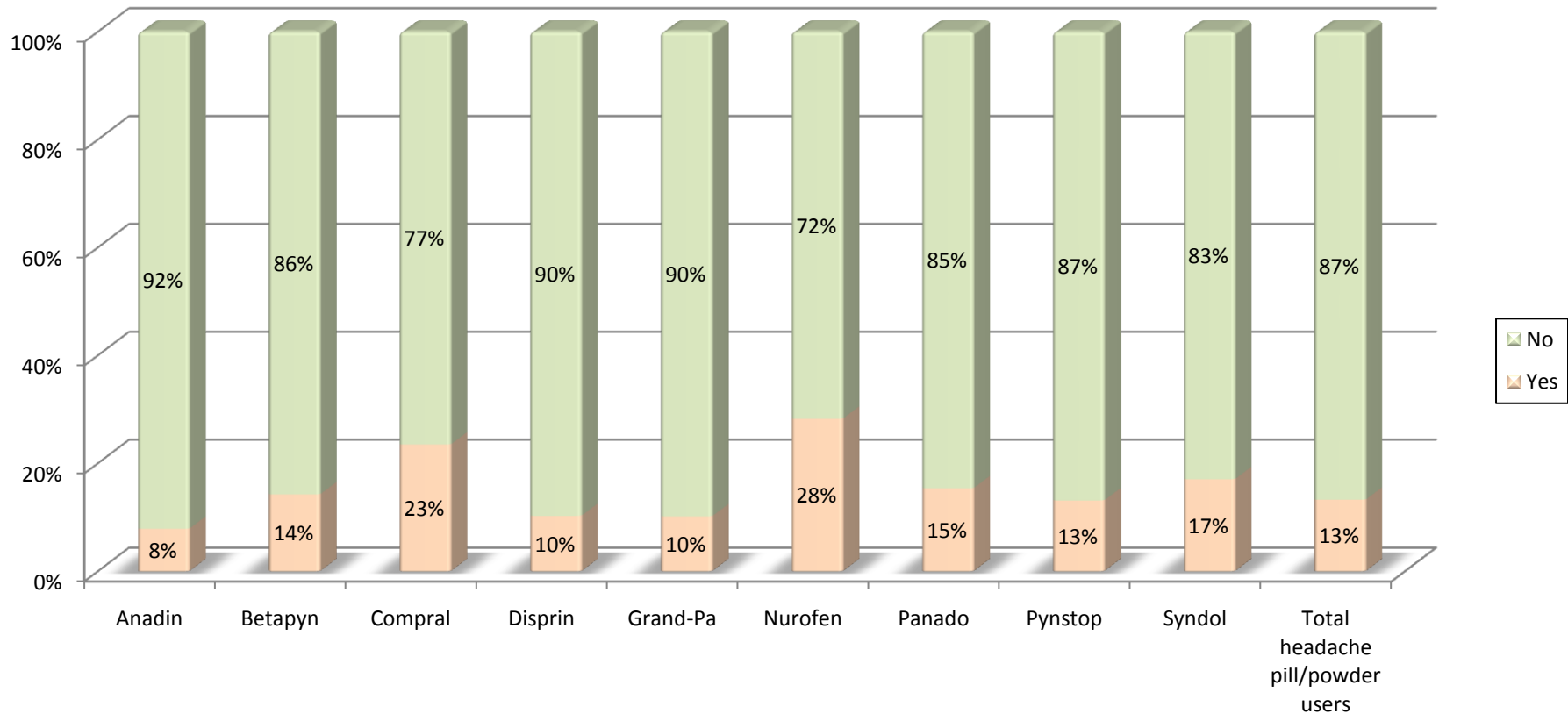
Source: AMPS 2008B (Adults 16+)

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)

SAMPLE FROM REPORT

INTERNET ACCESS

Accessed the Internet in the past 7 days by headache pill/powder brand



● Nurofen users accessed the internet the most (28%) followed by Compral (23%)

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)

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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- 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%



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