

SOUTH AFRICA BRAND REPORT

– CONSUMERS OF LAXATIVES –



COMPILED: NOVEMBER 2010

REPORT OVERVIEW

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

This comprehensive report examines the South African laxative 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 laxatives? 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

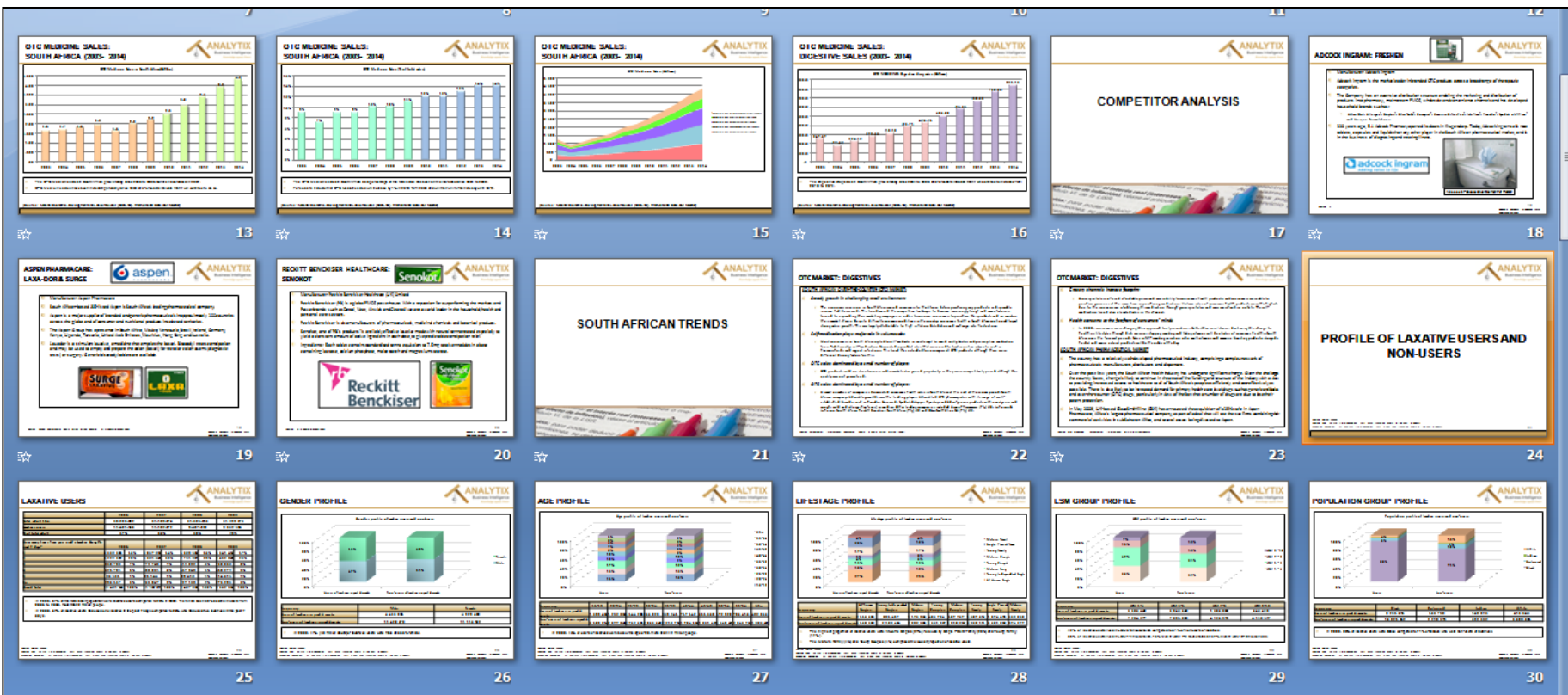
It provides a comprehensive consumer profile of the entire laxatives segment (minimum category sample = 5225 consumers), as well as a detailed segmentation by brand, namely: **Black Forest, Brooklax, Dulcolax, Freshen, Hamburg Tea, Laxa-Dor, Puritone, Senokot, Surge and Super Tabs.**

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



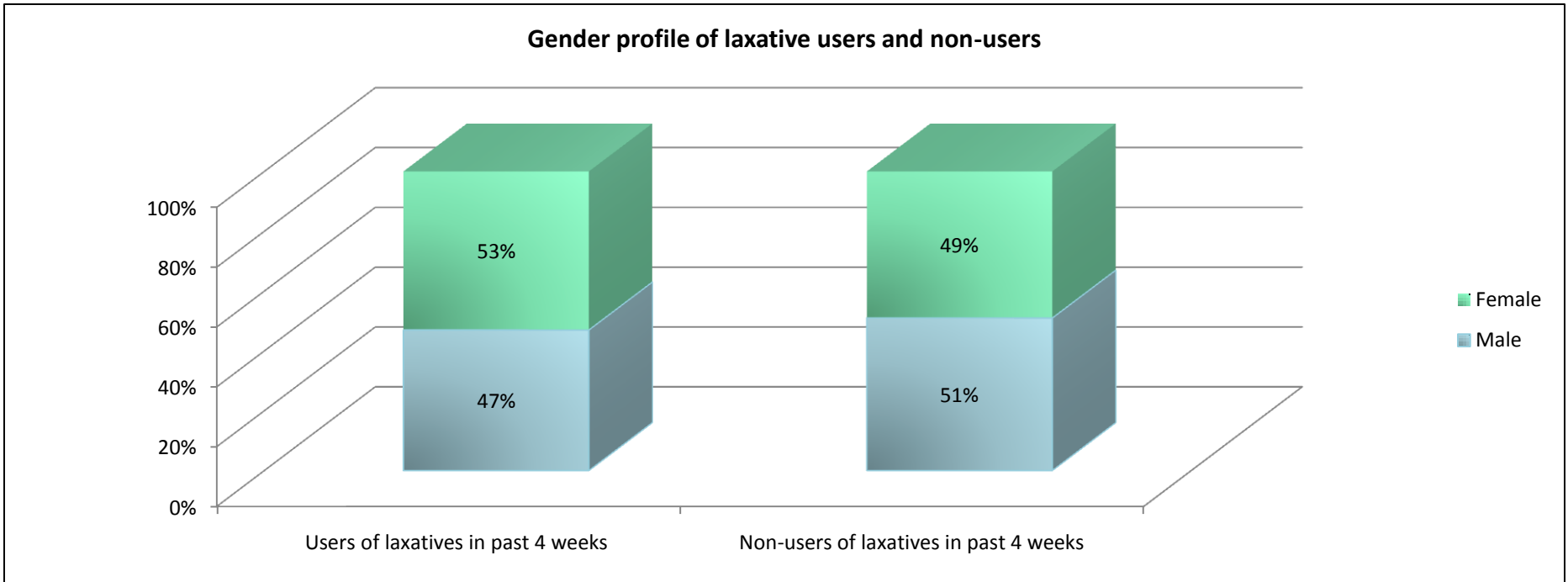
The screenshots display various data visualizations and text-based insights:

- 13-15:** OTC MEDICINE SALES: SOUTH AFRICA (2005- 2014). Three bar charts showing sales trends for different categories.
- 16:** OTC MEDICINE SALES: DIGESTIVE SALES (2005- 2014). A bar chart showing sales trends for digestive medicines.
- 17:** COMPETITOR ANALYSIS. A slide with text and a small image of a toilet.
- 18:** ADCOCK INGRAM: FRESH. A slide with text and an image of a toilet.
- 19:** ASPEN PHARMACEUTICALS: LAXA-DORA SURGE. A slide with text and images of product boxes.
- 20:** RECKITT BENCKISER HEALTHCARE: SENOKOT. A slide with text and images of product boxes.
- 21:** SOUTH AFRICAN TRENDS. A slide with text and a small image of a toilet.
- 22:** OTC MARKET: DIGESTIVES. A slide with text and a small image of a toilet.
- 23:** OTC MARKET: DIGESTIVES. A slide with text and a small image of a toilet.
- 24:** PROFILE OF LAXATIVE USERS AND NON-USERS. A slide with text and a small image of a toilet.
- 25:** LAXATIVE USERS. A table showing user demographics.
- 26:** GENDER PROFILE. A 3D bar chart showing gender distribution.
- 27:** AGE PROFILE. A 3D bar chart showing age distribution.
- 28:** LIFESTAGE PROFILE. A 3D bar chart showing life stage distribution.
- 29:** LSM GROUP PROFILE. A 3D bar chart showing LSM group distribution.
- 30:** POPULATION GROUP PROFILE. A 3D bar chart showing population group distribution.

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

SAMPLE FROM REPORT

GENDER PROFILE



Frequency	Male	Female
Users of laxatives in past 4 weeks	4 433 035	4 929 489
Non-users of laxatives in past 4 weeks	11 420 670	11 116 182

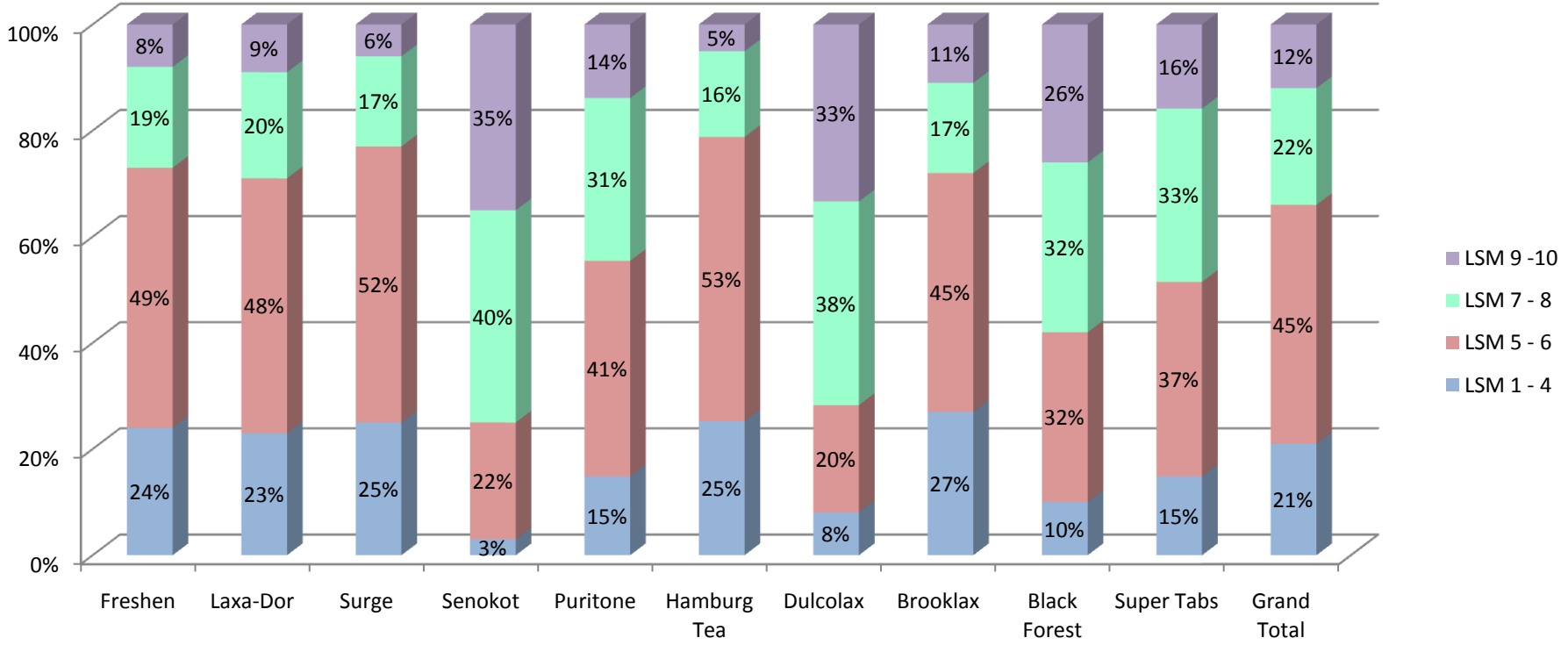
● In 2009, 47% (4.9 million adults) of laxatives users were male and 53% female.

Source: AMPS 2009B
 Sample Size: 25 170 (total population 16+); 5225 (Laxative users in the past 4 weeks)
 Weighted Population: 31 899 376 (total population 16+); 9 362 524 (Laxative users in the past 4 weeks)

SAMPLE FROM REPORT

BRAND PROFILE: LSM

Profile of laxatives consumed most often by LSM



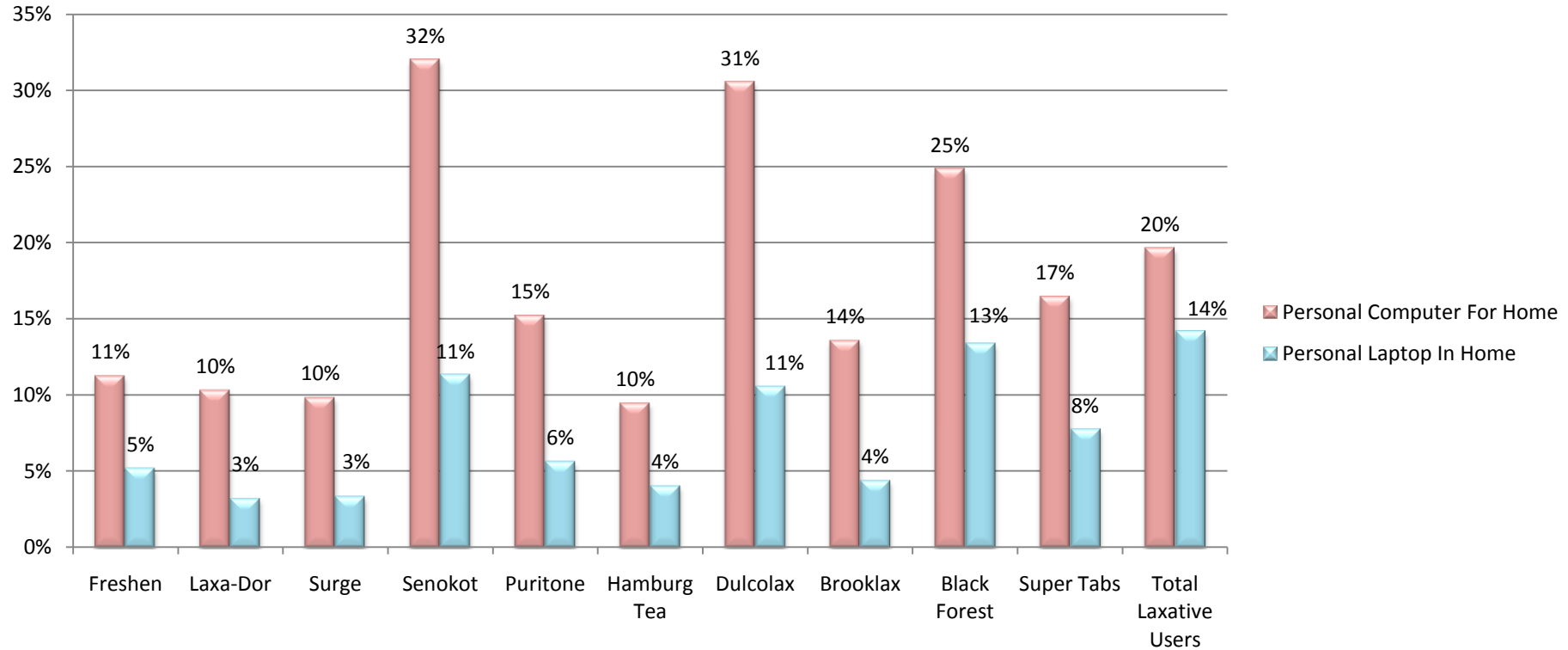
- Surge users comprised mainly of 52% from LSM 5-6 households followed by LSM 1-4 (25%).
- The highest proportion of Dulcolax users were from LSM 7-8 (38%), followed by LSM 9-10 (33%).

Source: AMPS 2009B
 Sample Sizes : 5255 (Users of laxatives brands)
 *Note: All figures are based on respondent observation numbers

SAMPLE FROM REPORT

COMPUTER OWNERSHIP

Computer ownership in household by laxative brand



- 32% of Senokot users owned a desktop computer, while 11% owned a laptop computer.
- Only 10% of Hamburg Tea users had a desktop computer and 4% had a laptop computer.

Source: AMPS 2009B
 Sample Sizes : 5255 (Users of laxatives brands)
 *Note: All figures are based on respondent observation numbers

SAMPLE FROM REPORT: TOP 3 MONTHLY MAGAZINES



Magazine	Percentage
Freshen	
True Love	17%
Bona	12%
Amakhosi	9%

Magazine	Percentage
Laxa-Dor	
True Love	11%
Bona	11%
Amakhosi	8%

Magazine	Percentage
Surge	
True Love	17%
Bona	14%
Amakhosi	8%

Magazine	Percentage
Senokot	
Dish	10%
True Love	9%
Fair Lady	9%

Magazine	Percentage
Puritone	
True Love	11%
Fair Lady	7%
Bona	7%

Magazine	Percentage
Hamburg Tea	
Bona	15%
True Love	12%
Amakhosi	6%

Magazine	Percentage
Dulcolax	
Dish	12%
True Love	12%
Men's Health	6%

Magazine	Percentage
Brooklax	
True Love	13%
Bona	11%
Amakhosi	8%

Magazine	Percentage
Black Forest	
True Love	13%
Bona	9%
Dish	9%

Magazine	Percentage
Super Tabs	
True Love	13%
Amakhosi	8%
Food & Home	8%

Magazine	Percentage
Total laxative users	
True Love	14%
Bona	11%
Amakhosi	7%

- The top three magazines among total laxative users were True Love (14%), Bona (11%) and Amakosi (7%).
- Among Dulcolax users, the most popular magazines were Dish (12%), True Love (12%) and Men's Health (6%).

Source: AMPS 2009B
 Sample Sizes : 5255 (Users of laxatives brands)
 *Note: All figures are based on respondent observation numbers

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. **Digestives Sales in South Africa:** 2003-2009 (Actual sales); 2010-2014 (Forecasts)

3. Competitor Analysis and Laxative Market/Consumer Trends

- 3.1. **Competitor Analysis: Top 3 Laxative Brands:** Freshen; Laxador & Surge; Senokot
- 3.2. **South African Laxatives Industry:** Overview of the South African OTC market and Digestives market

TABLE OF CONTENTS

4. Profile of Laxative Users and Non-Users (2009)

- 4.1. **Laxative Users:** Overview: Total adult population (2006-2009)
- 4.2. **Gender:** Male; Female
- 4.3. **Age:** 16-19; 20-24, 25-29; 30-34, 35-39, 40-44, 45-49, 50-54, 55-64, 65+
- 4.4. **Lifestage:** At-home Singles; Young Independent Singles; Mature Singles; Young Couples; Mature Couples; Young Family; Single Parent Family; Mature Family
- 4.5. **LSM Group:** 1-4; 5-6; 7-8; 9-10
- 4.6. **Population Group:** Black; White; Coloured; Indian
- 4.7. **Home Language:** Afrikaans; English; IsiZulu; isiXhosa; North Sotho; South Sotho; Tswana; Tsonga; Venda; Swazi; Ndebele; Other languages
- 4.8. **Province:** Western Cape; Northern Cape; Free State; Eastern Cape; KwaZulu-Natal; Mpumalanga; Limpopo; Gauteng; North West
- 4.9. **Community Type:** Metropolitan Areas; Cities and large towns; Small towns and villages; Settlements and Non-urban areas

TABLE OF CONTENTS

5. Market and Brand Trends

- 5.1. **Consumer Trends 2006-2009: LSM:** 1-4; 5-6; 7-8; 9-10
- 5.2. **Detailed segmentation overview: 2006-2009**
- 5.3. **Brand Penetration: 2006-2009**
- 5.4. **Brand Penetration: 2009** The laxative segment has been further segmented by brand: Black Forest; Brooklax; Dulcolax; Freshen; Hamburg Tea; Laxa-Dor; Puritone; Senokot; Super Tabs; Surge
- 5.5. **Consumption Frequency: 2006-2009:** Light, Medium, Heavy

6. Brand Profile and Brand Penetration (2009): Black Forest, Brooklax, Dulcolax, Freshen, Hamburg Tea, Laxa-Dor, Puritone, Senokot, Surge and Super Tabs

- 6.1. **Gender Profile:** Brand profile 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 and 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 penetration: usage: Light, Medium, Heavy
- 6.10. **Consumption Frequency:** Age penetration: usage: Light, Medium, Heavy
- 6.11. **Consumption Frequency:** Lifestage penetration: usage: Light, Medium, Heavy
- 6.12. **Consumption Frequency:** Population penetration: usage: Light, Medium, Heavy

TABLE OF CONTENTS

7. Lifestyle (2009): Black Forest, Brooklax, Dulcolax, Freshen, Hamburg Tea, Laxa-Dor, Puritone, Senokot, Surge and Super Tabs

- 7.1. **Cell phone Ownership:** Cell phone ownership by brand
- 7.2. **Payment Mechanism:** Payment Mechanism by brand
- 7.3. **Make of Cellphone:** Cell phone make by 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:** Internet Access by brand
- 7.7. **Financial Institutions:** Financial institutions by brand
- 7.8. **Top 10 Sports Interests:** Sports interested in by top 4 brands
- 7.9. **Top 10 Sports Participation:** Sports participated in by top 4 brands
- 7.10. **Top 10 Favourite Music:** Favourite music types by top 4 brands
- 7.11. **Frequency of cinema visits:** Frequency of cinema visits in average four weeks by brand

8. Media (2009): Black Forest, Brooklax, Dulcolax, Freshen, Hamburg Tea, Laxa-Dor, Puritone, Senokot, Surge and Super Tabs

- 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. **TV channels:** Top three terrestrial TV channels by brand
- 8.4. **DSTV channels:** Top 3 DSTV channels by brand
- 8.5. **Radio stations:** Top three radio stations by brand
- 8.6. **Outdoor Media:** Awareness of outdoor media by total laxative users

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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.

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