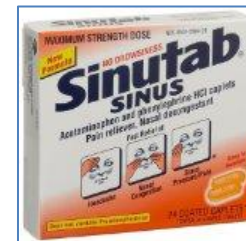
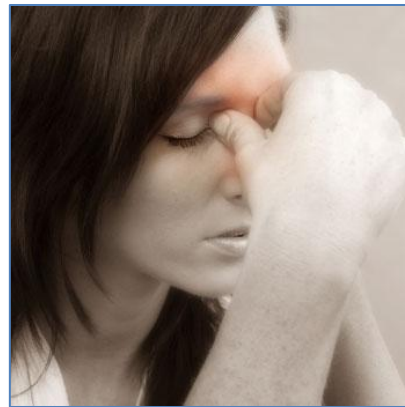


# SOUTH AFRICA BRAND REPORT

## – CONSUMERS OF THROAT/SINUS REMEDIES –



**COMPILED: NOVEMBER 2010**

# REPORT OVERVIEW

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

This comprehensive report examines the South African throat and sinus 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 throat and sinus 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

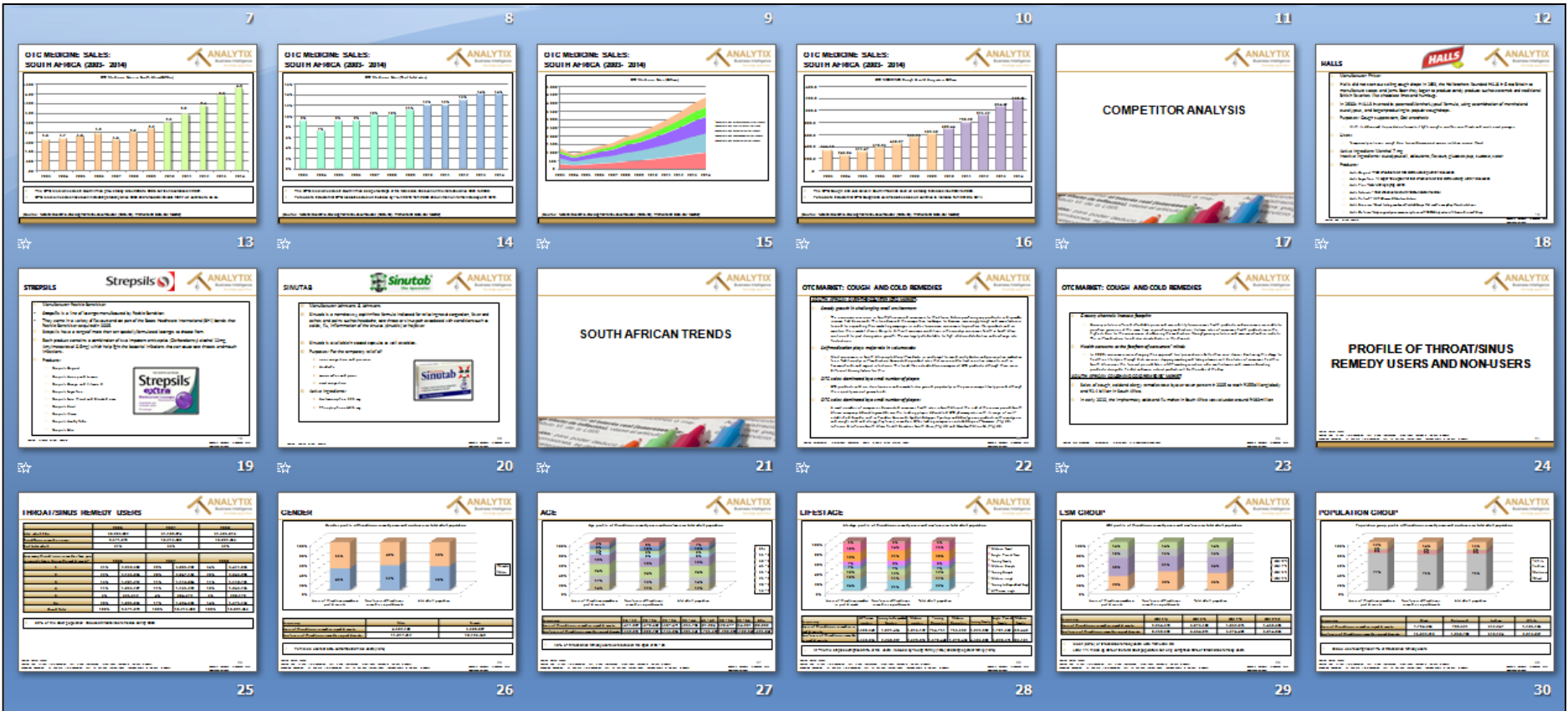
It provides a comprehensive consumer profile of the entire throat and sinus remedy segment (minimum category sample = 6964 consumers), as well as a detailed segmentation by brand, namely: **Cepacol; Halls; Medi-keel; Sinumax; Sinutab; Strepsils; Woods.**

It examines in detail the demographics, lifestyle, media consumption and cell phone and Internet usage of the throat and sinus remedies 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 a variety of data analysis tools and reports:

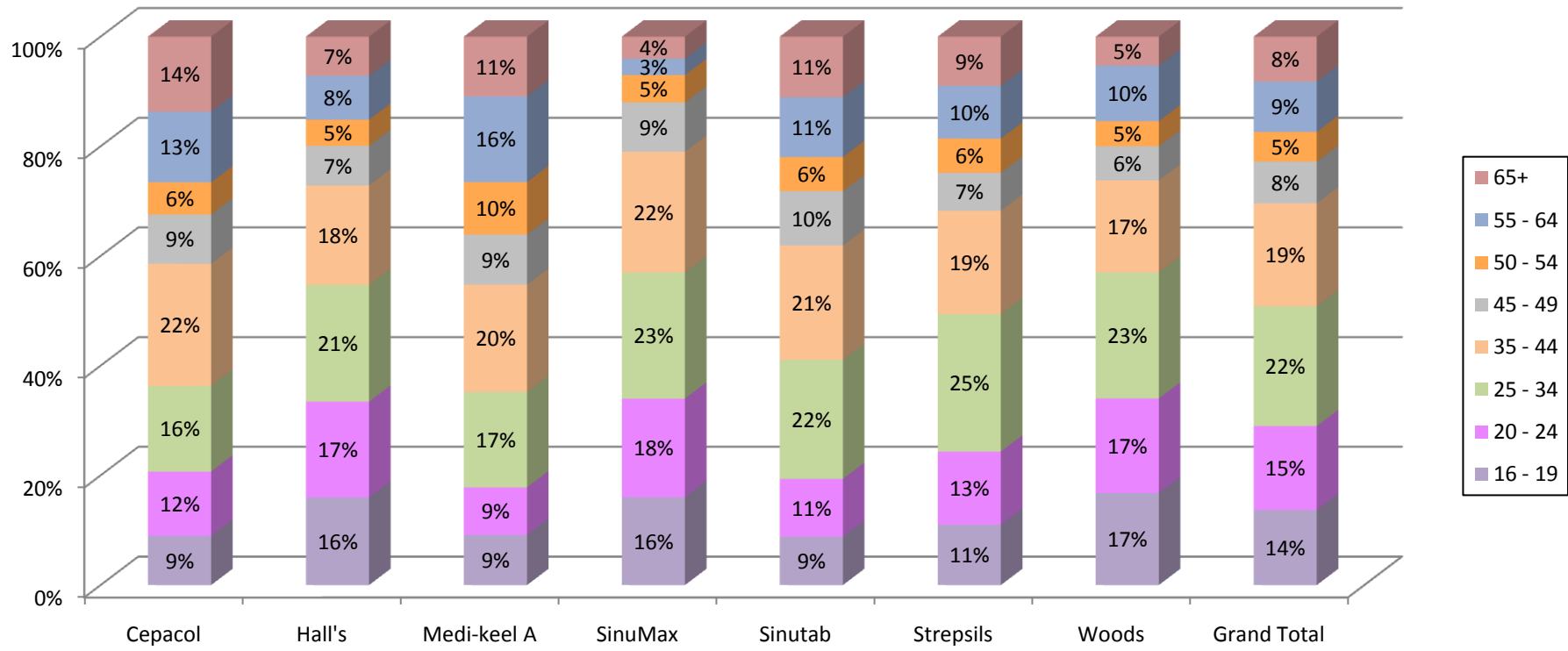
- 7-10:** OTC Medicine Sales for South Africa (2005-2014) shown as bar and line charts.
- 11:** Competitor Analysis report for Halls.
- 13-15:** Strepsils and Sinutab product profiles with images and key features.
- 16-18:** OTC Market: Cough and Cold Remedies, including a South African Trends section.
- 19-24:** Demographic profiles for Throat/Sinus Remedy Users and Non-Users, categorized by Age (Youngest, Middle, Oldest) and Gender (Male, Female).
- 25-30:** Detailed demographic breakdowns for Throat/Sinus Remedy Users, including tables for Age and Gender distribution.

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

# SAMPLE FROM REPORT

## BRAND PROFILE: AGE

Profile of throat & sinus remedies consumed most often by age group



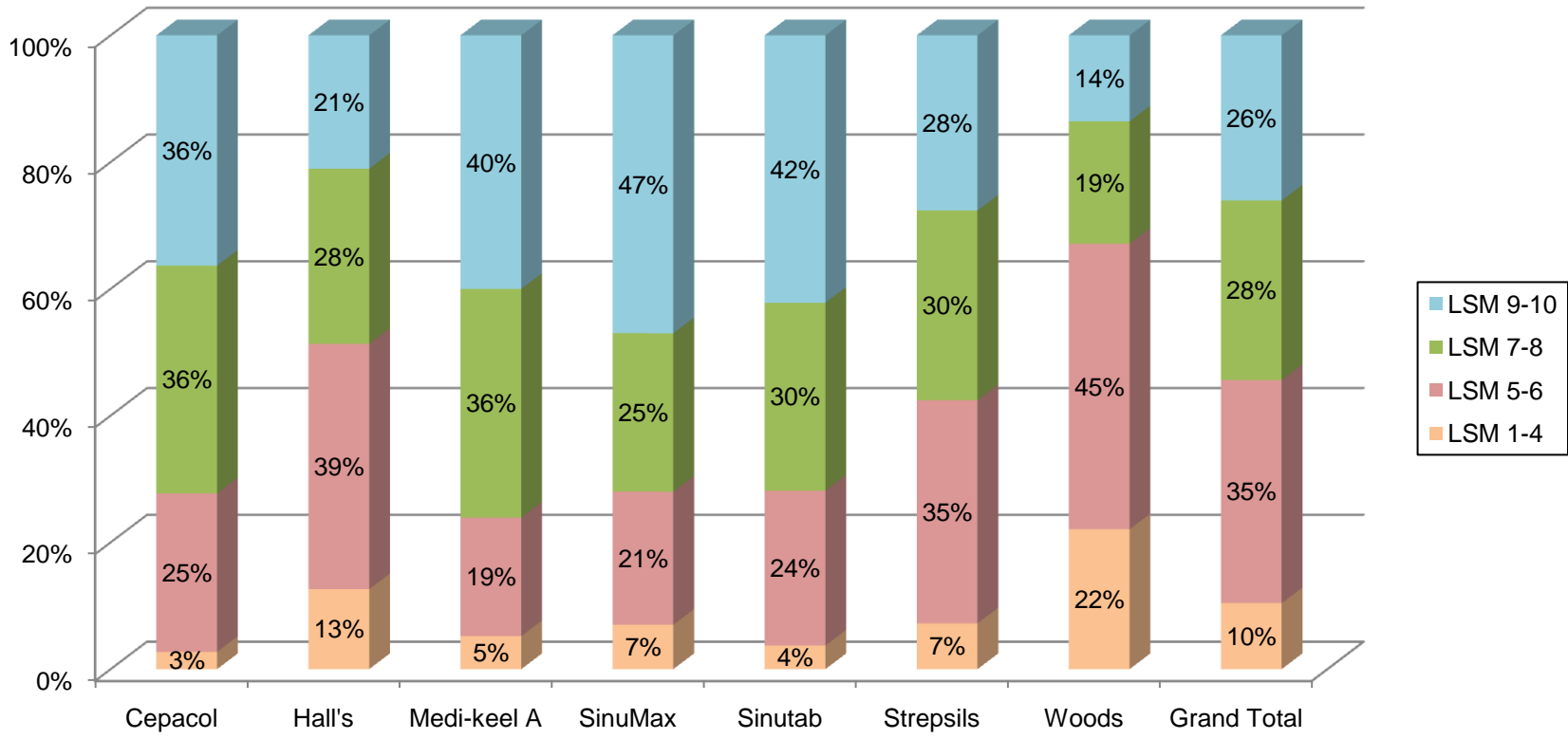
● 57% of SinuMax users were <35 years old compared to 35% of Medi-Keel users.

Source: AMPS 2008B  
 Sample Sizes : 6 964 (Users of throat/sinus remedies in past 4 weeks)  
 \*Note: All figures are based on respondent observation numbers

# SAMPLE FROM REPORT

## LSM PROFILE

Profile of throat & sinus remedies consumed most often by LSM



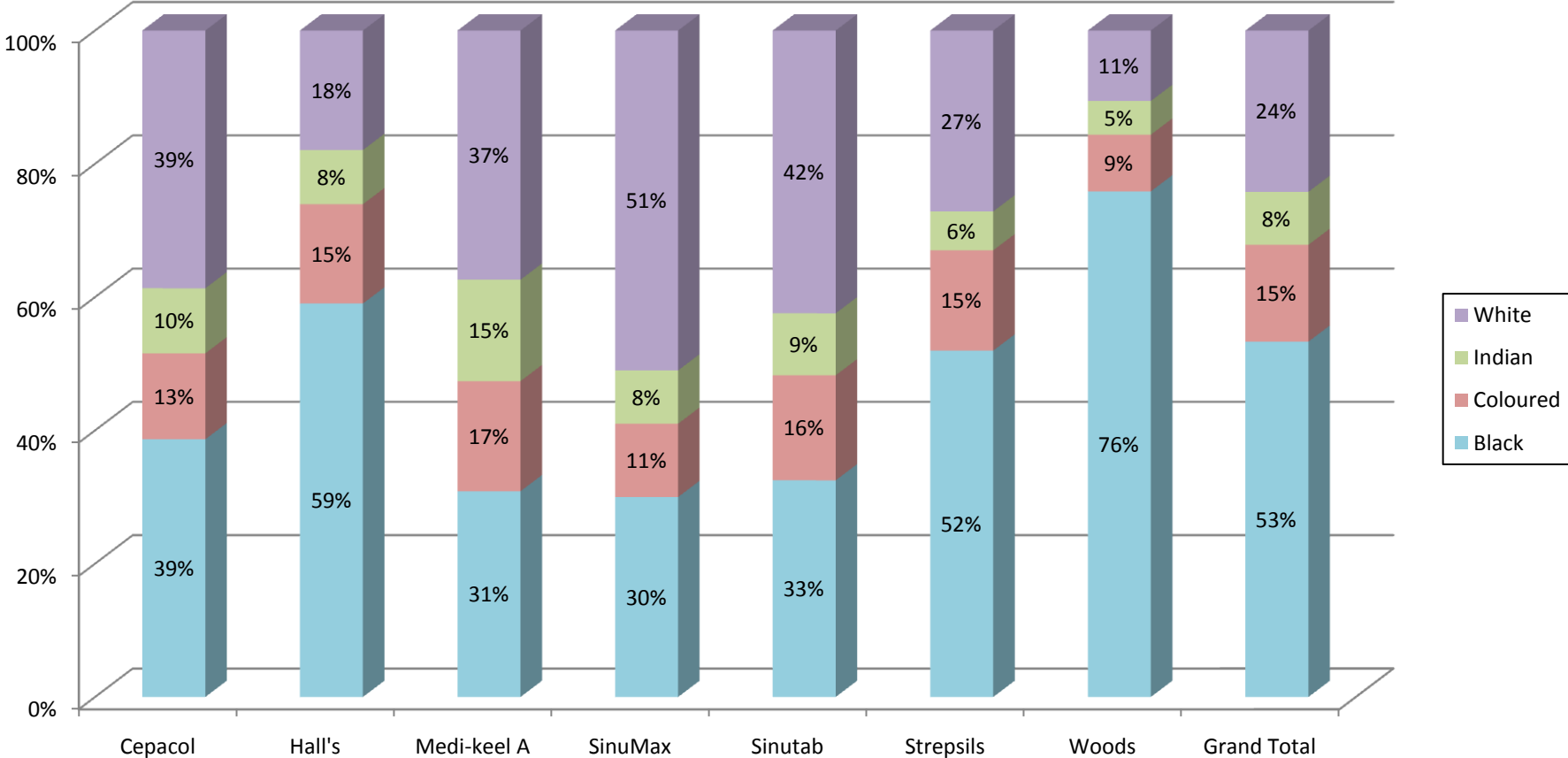
- 47% of SinuMax consumers are in LSM 9-10 compared to 21% of Hall's consumers.
- For Woods, 45% of consumers are in LSM 5-6 compared to 19% of Medi-keel A consumers.

Source: AMPS 2008B (Adults 16+)  
 Note: all figures are based on AMPS sample of (Throat/ Sinus remedies taken in the past 4 weeks ; sample size: 6964

# SAMPLE FROM REPORT

## BRAND PROFILE: POPULATION GROUP

Profile of throat & sinus remedies consumed most often by population group



● Medi-keel A has the highest proportion of Coloured users (17%) and Indian users (15%) among all the brands.

Source: AMPS 2008B (Adults 16+)  
 Note: all figures are based on AMPS sample of (Throat/ Sinus remedies taken in the past 4 weeks ; sample size: 6964

# SAMPLE FROM REPORT

## TOP 3 MONTHLY MAGAZINES



Cepacol	Percentage
True Love	6%
Men's Health	5%
COSMOPOLITAN	5%

Hall's	Percentage
True Love	10%
BONA	8%
car	5%

Medi-keel A	Percentage
COSMOPOLITAN	9%
True Love	7%
Men's Health	7%

SinuMax	Percentage
Speed & Sound	11%
COSMOPOLITAN	10%
FHM	9%

Sinutab	Percentage
True Love	7%
car	6%
Rooi Rose	6%

Strepsils	Percentage
True Love	10%
BONA	7%
Fairlady	6%

Woods	Percentage
True Love	9%
BONA	8%
Amakhosi	5%

Total users	Percentage
True Love	8%
COSMOPOLITAN	6%
BONA	5%

- The most popular monthly magazine among total throat and sinus remedy users were True Love (8%) followed by Cosmopolitan (6%) and Bona (5%).
- For Hall's consumers, the most popular monthly magazines were True Love (10%), Bona (8%) and Car (5%).

Source: AMPS 2008B (Adults 16+)

Note: all figures are based on AMPS sample of (Throat/ Sinus remedies taken in the past 4 weeks ; sample size: 6964 (see beginning of section for breakdown)

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

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## 2. Historical Sales and Forecasts

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- 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)
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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.