

SOUTH AFRICA BRAND REPORT

– CONSUMERS OF FORTIFIED WINE –



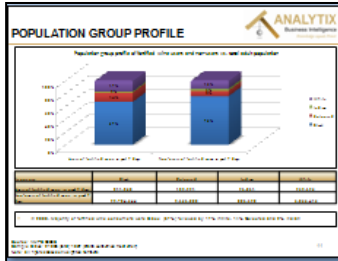
COMPILED: JANUARY 2010

REPORT OVERVIEW

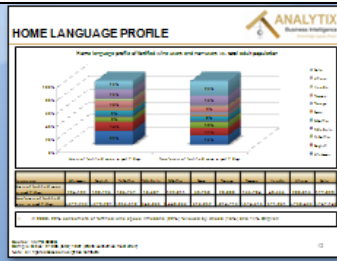
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(63 pages)

- This report examines the fortified wine segment of the South African market.
- It answers the questions: who are the users of fortified wine, what brands are they using, and how do I communicate with them?
- It provides a comprehensive profile of the entire fortified wine segment, as well as a detailed segmentation by brand, namely: Monis; Sedgwick's Old Brown Sherry; Ship Sherry.
- It examines in detail the demographics, lifestyle, media consumption and cellphone and Internet usage of the fortified wine segment by brand, making it a vital reference report for anyone wanting to understand this segment of the market.

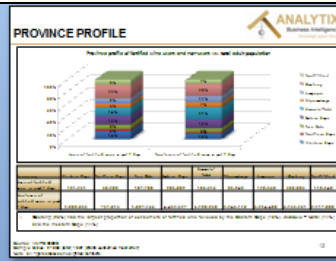
SCREENSHOTS FROM REPORT



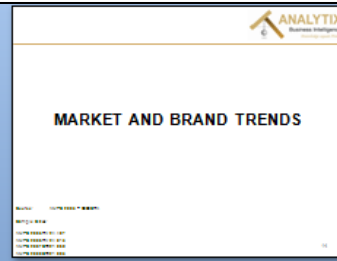
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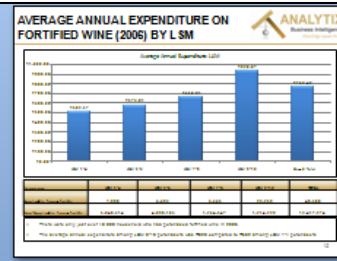
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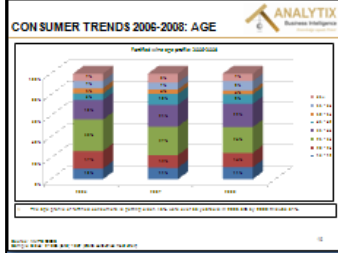
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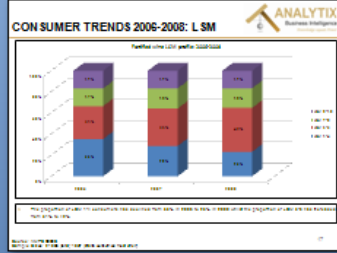
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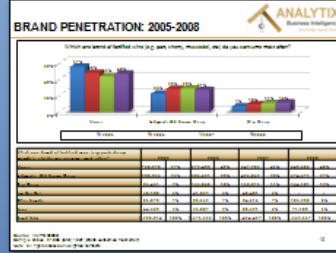
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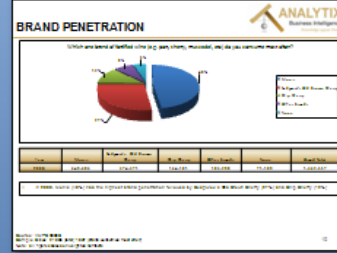
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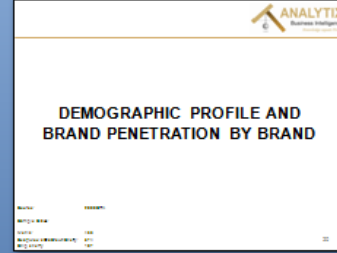
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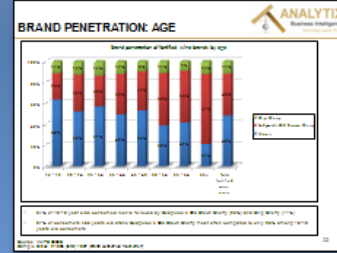
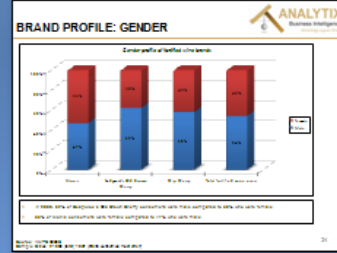
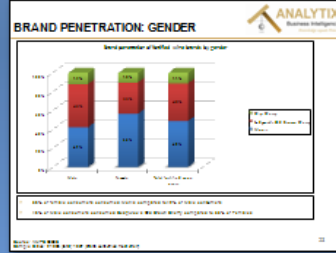
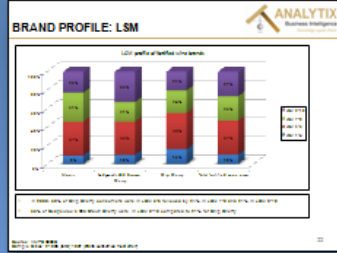
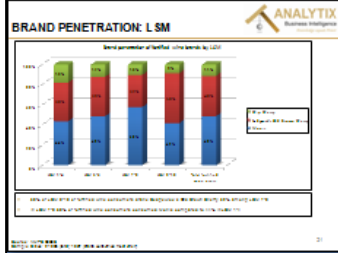
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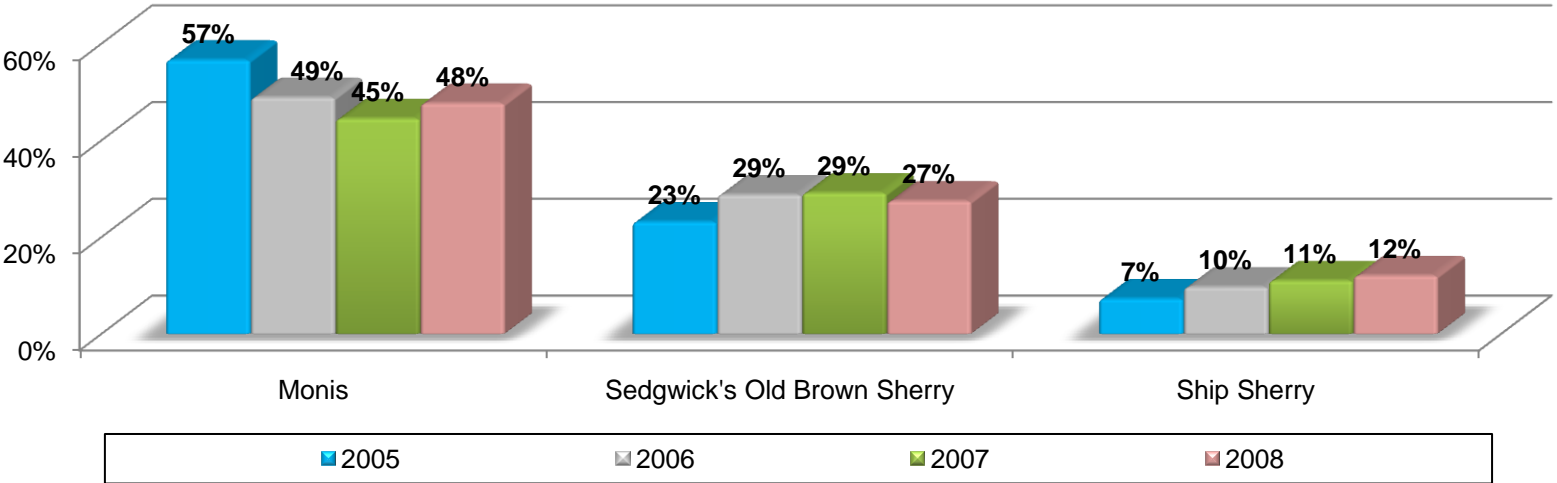
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63 page report with 70+ charts, graphs, tables and insights

SAMPLE FROM REPORT: BRAND PENETRATION 2005-2008

Which one brand of fortified wine (e.g. port, sherry, muscadel, etc) do you consume most often?

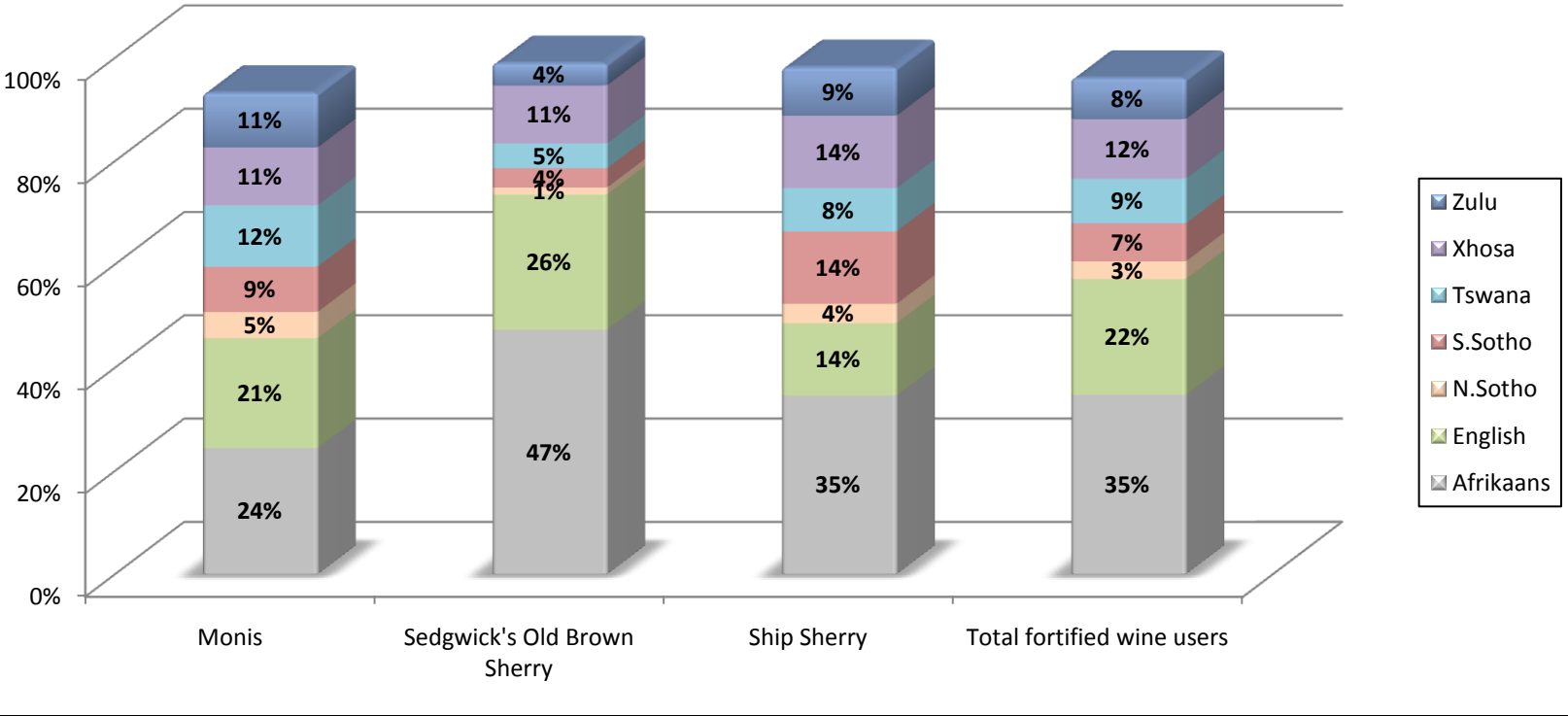


Which one brand of fortified wine (e.g. port, sherry, muscadel, etc) do you consume most often?	2005		2006		2007		2008	
Monis	730,978	57%	672,499	49%	647,283	45%	649,686	48%
Sedgwick's Old Brown Sherry	298,956	23%	395,621	29%	423,862	29%	374,371	27%
Ship Sherry	93,431	7%	133,068	10%	159,973	11%	164,101	12%
Van Der Stel	38,100	3%	41,027	3%	48,401	3%	/	/
Other brands	85,079	7%	99,532	7%	94,616	7%	103,290	8%
None	44,369	3%	33,807	2%	80,321	6%	71,109	5%
Grand Total	1,290,914	100%	1,375,555	100%	1,454,457	100%	1,362,557	100%

Source: AMPS 2008B
 Sample Sizes : 21 083 (total); 1037 (brand consumed most often)
 Note: all figures based on weighted numbers

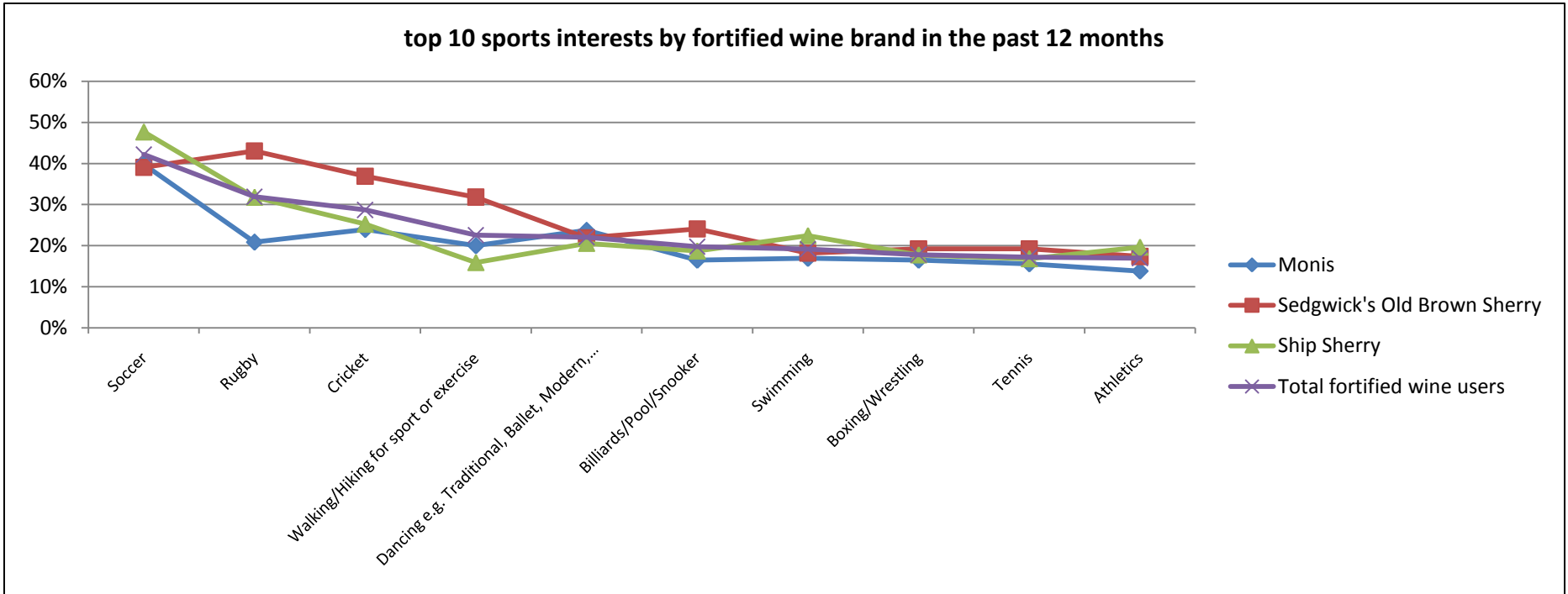
SAMPLE FROM REPORT: BRAND PROFILE: HOME LANGUAGE

Home language profile of fortified wine brands



● Sedgwick's Old Brown Sherry consumers mainly comprised of Afrikaans consumers (47%) and English speakers (26%)

SAMPLE FROM REPORT: SPORTS INTERESTS (TOP 10)



- In 2008, the most popular sports interests among all fortified wine consumers was Soccer, Rugby and Cricket
- The most popular sports interest among Ship Sherry consumers was Soccer compared to Sedgwick's Old Brown Sherry which had Rugby as it's most popular sports interest

SAMPLE FROM REPORT: TOP 3 MONTHLY MAGAZINES

Sedgwick's Old Brown Sherry	Percentage
Rooi Rose	7%
car	7%
Fairlady	6%

Ship Sherry	Percentage
BONA	7%
True Love	6%
Speed & Sound	6%

Monis	Percentage
True Love	11%
COSMOPOLITAN	6%
BONA	6%

Total users	Percentage
True Love	7%
BONA	5%
car	5%

- The most popular top three monthly magazines among all fortified wine consumers was True Love (7%), Bona (5%) and Car (5%)
- Sedgwick's Old Brown consumers top three monthly magazines were Rooi Rose (7%), Car (7%) and Fairlady (6%)

Source: AMPS 2008B (Adults 16+)
 Note: all figures are based on AMPS sample of Sample Sizes : 21 083 (total); 1037 (brand consumed most often)
 Note: all figures based on AMPS AIRS (average issue readership) totals

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- 2.2. **LSM Group:** 1-4; 5-6; 7-8; 9-10
- 2.3. **Gender:** Male; Female
- 2.4. **Age:** 16-19; 20-24, 25-34, 35-44, 45-49, 50-54, 55-64, 65+
- 2.5. **Lifestage:** At home singles; Starting-out singles; Couples; Parents; Single parents
- 2.6. **Population Group:** Black; White; Coloured; Indian
- 2.7. **Home Language:** English, isiZulu, isiXhosa, isiNdebele, Afrikaans, siSwati, Sepedi, Sesotho, Setswana, Tshivenda and Xitsonga
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