

SOUTH AFRICA BRAND REPORT

– CONSUMERS OF BOTTLED WINE –



COMPILED: JANUARY 2010

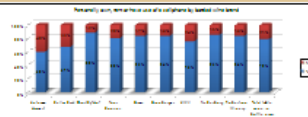
REPORT OVERVIEW

Compiled: January 2010
(63 pages)

- This report examines the table wine in bottle segment of the South African market.
- It answers the questions: who are the users of table wine in bottles, what brands are they using, and how do I communicate with them?
- It provides a comprehensive profile of the entire table wine in bottle segment, as well as a detailed segmentation by brand, namely: Autumn Harvest; Cellar Cask; Drostdy-Hof; Four Cousins; Graca; Grunberger; KWV; Nederburg; Robertson Winery.
- It examines in detail the demographics, lifestyle, media consumption and cellphone and Internet usage of the table wine in bottle segment by brand, making it a vital reference report for anyone wanting to understand this segment of the market.

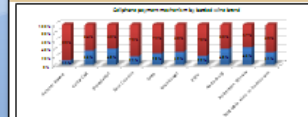
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CELLPHONE OWNERSHIP



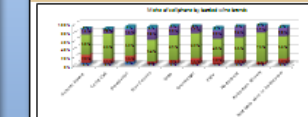
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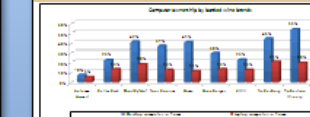
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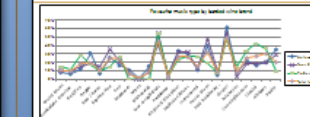
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SPORTS INTERESTS (TOP 10): SELECTED WINE BRANDS



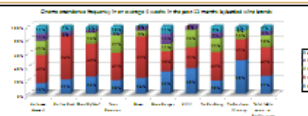
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FAVOURITE MUSIC TYPES: SELECTED WINE BRANDS



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CINEMA ATTENDANCE



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MEDIA

TOP 3 DAILY NEWSPAPERS

State	1st	2nd	3rd
Alabama	Alabama	Alabama	Alabama
Alaska	Alaska	Alaska	Alaska
Arizona	Arizona	Arizona	Arizona
Arkansas	Arkansas	Arkansas	Arkansas
California	California	California	California
Colorado	Colorado	Colorado	Colorado
Connecticut	Connecticut	Connecticut	Connecticut
Delaware	Delaware	Delaware	Delaware
District of Columbia	District of Columbia	District of Columbia	District of Columbia
Florida	Florida	Florida	Florida
Georgia	Georgia	Georgia	Georgia
Hawaii	Hawaii	Hawaii	Hawaii
Idaho	Idaho	Idaho	Idaho
Illinois	Illinois	Illinois	Illinois
Indiana	Indiana	Indiana	Indiana
Iowa	Iowa	Iowa	Iowa
Kansas	Kansas	Kansas	Kansas
Kentucky	Kentucky	Kentucky	Kentucky
Louisiana	Louisiana	Louisiana	Louisiana
Maine	Maine	Maine	Maine
Maryland	Maryland	Maryland	Maryland
Massachusetts	Massachusetts	Massachusetts	Massachusetts
Michigan	Michigan	Michigan	Michigan
Minnesota	Minnesota	Minnesota	Minnesota
Mississippi	Mississippi	Mississippi	Mississippi
Missouri	Missouri	Missouri	Missouri
Montana	Montana	Montana	Montana
Nebraska	Nebraska	Nebraska	Nebraska
Nevada	Nevada	Nevada	Nevada
New Hampshire	New Hampshire	New Hampshire	New Hampshire
New Jersey	New Jersey	New Jersey	New Jersey
New Mexico	New Mexico	New Mexico	New Mexico
New York	New York	New York	New York
North Carolina	North Carolina	North Carolina	North Carolina
North Dakota	North Dakota	North Dakota	North Dakota
Ohio	Ohio	Ohio	Ohio
Oklahoma	Oklahoma	Oklahoma	Oklahoma
Oregon	Oregon	Oregon	Oregon
Pennsylvania	Pennsylvania	Pennsylvania	Pennsylvania
Rhode Island	Rhode Island	Rhode Island	Rhode Island
South Carolina	South Carolina	South Carolina	South Carolina
South Dakota	South Dakota	South Dakota	South Dakota
Tennessee	Tennessee	Tennessee	Tennessee
Texas	Texas	Texas	Texas
Utah	Utah	Utah	Utah
Vermont	Vermont	Vermont	Vermont
Virginia	Virginia	Virginia	Virginia
Washington	Washington	Washington	Washington
West Virginia	West Virginia	West Virginia	West Virginia
Wisconsin	Wisconsin	Wisconsin	Wisconsin
Wyoming	Wyoming	Wyoming	Wyoming

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TOP 3 WEEKLY NEWSPAPERS

State	1st	2nd	3rd
Alabama	Alabama	Alabama	Alabama
Alaska	Alaska	Alaska	Alaska
Arizona	Arizona	Arizona	Arizona
Arkansas	Arkansas	Arkansas	Arkansas
California	California	California	California
Colorado	Colorado	Colorado	Colorado
Connecticut	Connecticut	Connecticut	Connecticut
Delaware	Delaware	Delaware	Delaware
District of Columbia	District of Columbia	District of Columbia	District of Columbia
Florida	Florida	Florida	Florida
Georgia	Georgia	Georgia	Georgia
Hawaii	Hawaii	Hawaii	Hawaii
Idaho	Idaho	Idaho	Idaho
Illinois	Illinois	Illinois	Illinois
Indiana	Indiana	Indiana	Indiana
Iowa	Iowa	Iowa	Iowa
Kansas	Kansas	Kansas	Kansas
Kentucky	Kentucky	Kentucky	Kentucky
Louisiana	Louisiana	Louisiana	Louisiana
Maine	Maine	Maine	Maine
Maryland	Maryland	Maryland	Maryland
Massachusetts	Massachusetts	Massachusetts	Massachusetts
Michigan	Michigan	Michigan	Michigan
Minnesota	Minnesota	Minnesota	Minnesota
Mississippi	Mississippi	Mississippi	Mississippi
Missouri	Missouri	Missouri	Missouri
Montana	Montana	Montana	Montana
Nebraska	Nebraska	Nebraska	Nebraska
Nevada	Nevada	Nevada	Nevada
New Hampshire	New Hampshire	New Hampshire	New Hampshire
New Jersey	New Jersey	New Jersey	New Jersey
New Mexico	New Mexico	New Mexico	New Mexico
New York	New York	New York	New York
North Carolina	North Carolina	North Carolina	North Carolina
North Dakota	North Dakota	North Dakota	North Dakota
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Oklahoma	Oklahoma	Oklahoma	Oklahoma
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South Dakota	South Dakota	South Dakota	South Dakota
Tennessee	Tennessee	Tennessee	Tennessee
Texas	Texas	Texas	Texas
Utah	Utah	Utah	Utah
Vermont	Vermont	Vermont	Vermont
Virginia	Virginia	Virginia	Virginia
Washington	Washington	Washington	Washington
West Virginia	West Virginia	West Virginia	West Virginia
Wisconsin	Wisconsin	Wisconsin	Wisconsin
Wyoming	Wyoming	Wyoming	Wyoming

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TOP 3 WEEKLY MAGAZINES

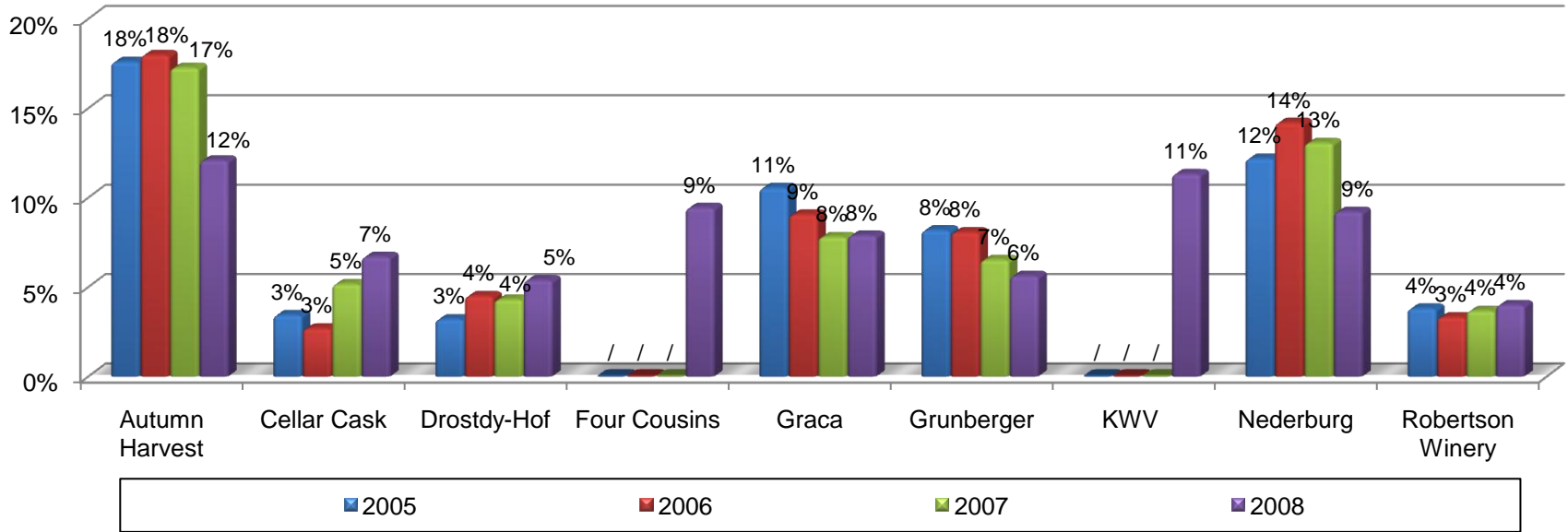
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Utah	Utah	Utah	Utah
Vermont	Vermont	Vermont	Vermont
Virginia	Virginia	Virginia	Virginia
Washington	Washington	Washington	Washington
West Virginia	West Virginia	West Virginia	West Virginia
Wisconsin	Wisconsin	Wisconsin	Wisconsin
Wyoming	Wyoming	Wyoming	Wyoming

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

SAMPLE FROM REPORT: BRAND PENETRATION

Which one brand of natural table wine - in bottles do you consume most often?

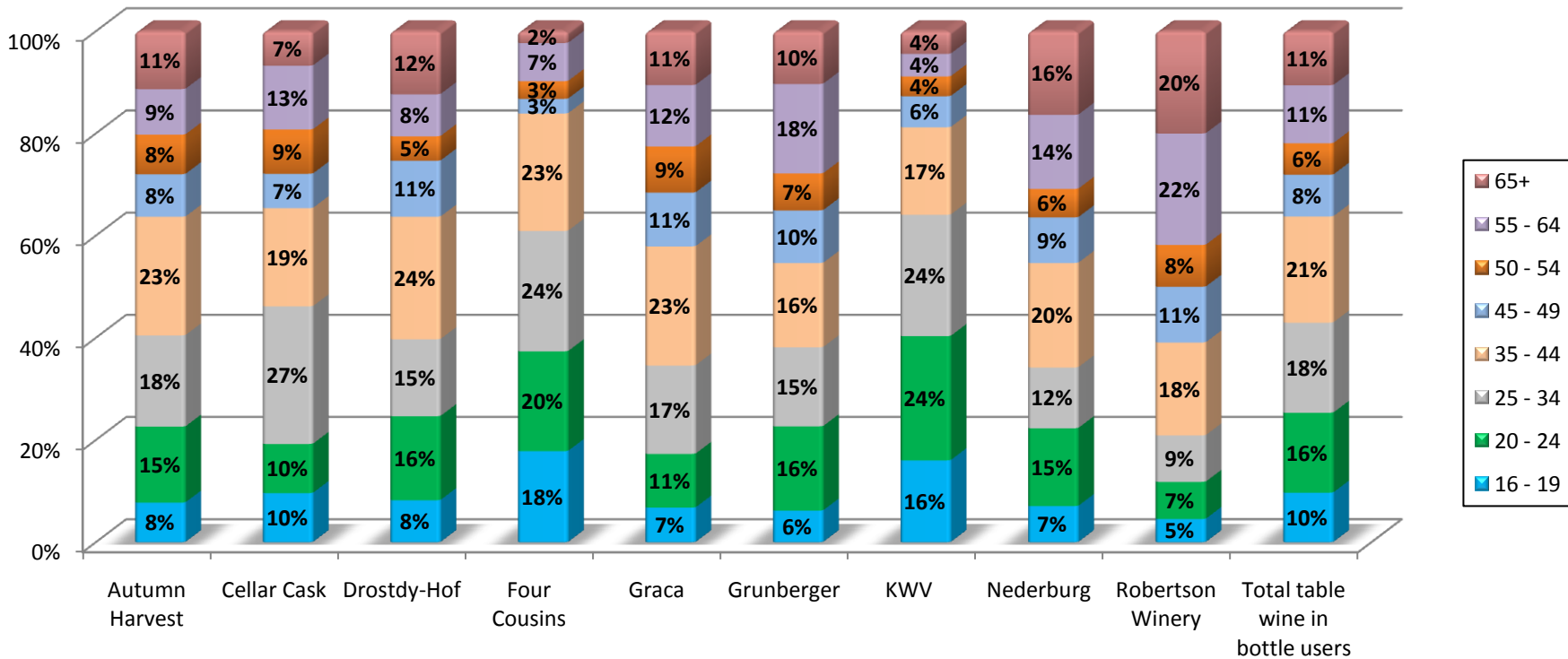


- In 2008, Autumn Harvest was the market leader among bottled wines with a 12% brand penetration followed closely by KWV at 11%
- The brand penetration for Cellar Cask has been increasing between 2005 and 2008

Source: AMPS 2008B
 Sample Sizes : 21 083 (total); 1988 Brand consumed most often
 Note: all figures based on weighted numbers

SAMPLE FROM REPORT: BRAND PROFILE: AGE

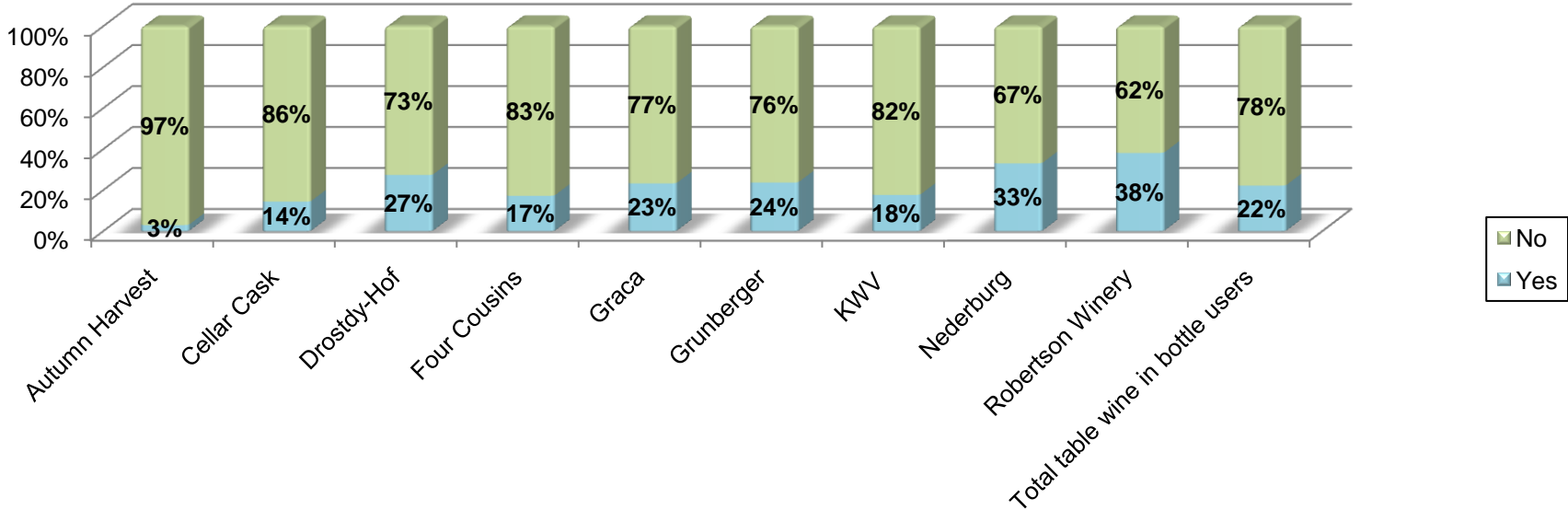
Age profile of bottled wine brands



● 62% of Four Cousins consumers were under the age of 35 years compared to only 21% of Robertson Winery consumers

SAMPLE FROM REPORT: INTERNET ACCESS

Accessed the Internet in the past 7 days by bottled wine brands



- 22% of the total bottled wine drinkers had accessed the internet in the past 7 days
- Only 3% of Autumn Harvest consumers had accessed the internet in the past 7 days compared to 38% of Robertson Winery consumers

SAMPLE FROM REPORT: TOP 3 MONTHLY MAGAZINES

Autumn Harvest	Percentage
BONA	7%
Amakhosi	5%
True Love	4%

Cellar Cask	Percentage
True Love	8%
Men's Health	8%
FHM	6%

Drostdy-Hof	Percentage
COSMOPOLITAN	12%
Sarie	10%
Rooi Rose	10%

Four Cousins	Percentage
True Love	17%
COSMOPOLITAN	11%
Oprah Magazine SA	10%

Graca	Percentage
Rooi Rose	11%
Sarie	10%
True Love	9%

Grunberger	Percentage
FHM	13%
Speed & Sound	12%
COSMOPOLITAN	10%

KWV	Percentage
Men's Health	9%
BONA	8%
Amakhosi	8%

Nederburg	Percentage
Sarie	7%
Men's Health	7%
SA Garden & Home	7%

Robertson Winery	Percentage
House and Garden	11%
SA Garden & Home	10%
Rooi Rose	9%

All Bottle Wine Users	Percentage
COSMOPOLITAN	7%
Rooi Rose	7%
True Love	7%

- The most popular top three monthly magazines among all bottled wine consumers were Cosmopolitan (7%), Rooi Rose (7%) and True love (7%)
- For Autumn Harvest, the three most popular monthly magazines were Bona, Amakosi and True Love
- The most popular monthly magazine among Drostdy – Hof consumers was Cosmopolitan, Sarie and Rooi Rose

Source: AMPS 2008B (Adults 16+)
 Note: all figures are based on AMPS sample of 1988 Brand consumed most often
 Note: all figures based on AMPS AIRS (average issue readership) totals

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- 1.2. **Global Wine Market: Consumption Trends**
- 1.3. **South African Wine Market: Background**
- 1.4. **South African Wine Market: Current Overview**

2. Profile of Bottled Wine Users and Non-Users (2008)

- 2.1. **Consumers of Table Wine In Bottle:** Overview: Total adult population (2005-2008); Total table wine in bottle user segment (2005-2008); Usage Overview (2005-2008)
- 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
- 2.8. **Province:** Western Cape; Northern Cape; Eastern Cape; KwaZulu-Natal; Free State; Mpumalanga; Gauteng; Limpopo; North West

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- 3.4. **Brand Penetration: 2005-2008**
- 3.5. **Brand Market Penetration:** : The table wine in bottle segment has been further segmented by brand: Autumn Harvest; Cellar Cask; Drostdy-Hof; Four Cousins; Graca; Grunberger; KWV; Nederburg; Robertson Winery

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- 4.1. **LSM Profile:** Brand profile and brand share of each brand by LSM group
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- 6.5. **TV channels via DStv:** Top three TV channels via DStv by brand
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- Analytix Business Intelligence is a South African marketing planning and business intelligence company who conduct local and global market research and analysis to help companies make smarter, more accountable decisions and improve their return on investment.
- We are an independent company with the expertise and resources to provide objective and reliable market intelligence reports.
- We have compiled and are in the process of compiling a number of South African reports with the intention of providing affordable South African market insight to companies and individuals.
- In addition, we are experts at doing desk and Internet research to create customised reports regarding consumer segments, industries or markets.
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