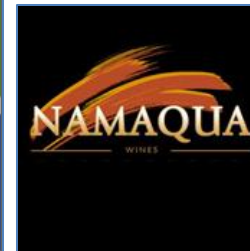
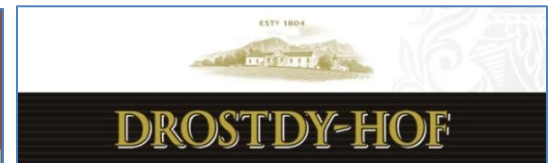




SOUTH AFRICA BRAND REPORT

– CONSUMERS OF BOX/ JUG WINE –



COMPILED: JANUARY 2010

REPORT OVERVIEW

**Compiled: January 2010
(65 pages)**

- This report examines the table wine in box/jug segment of the South African market.
- It answers the questions: who are the users of table wine in boxes/jugs, what brands are they using, and how do I communicate with them?
- It provides a comprehensive profile of the entire table wine in box/jug segment, as well as a detailed segmentation by brand, namely: Autumn Harvest; Cellar Cask; Drostdy-Hof; Namaqua; Overmeer; Paarl Perle.
- It examines in detail the demographics, lifestyle, media consumption and cellphone and Internet usage of the table wine in box/jug segment by brand, making it a vital reference report for anyone wanting to understand this segment of the market.

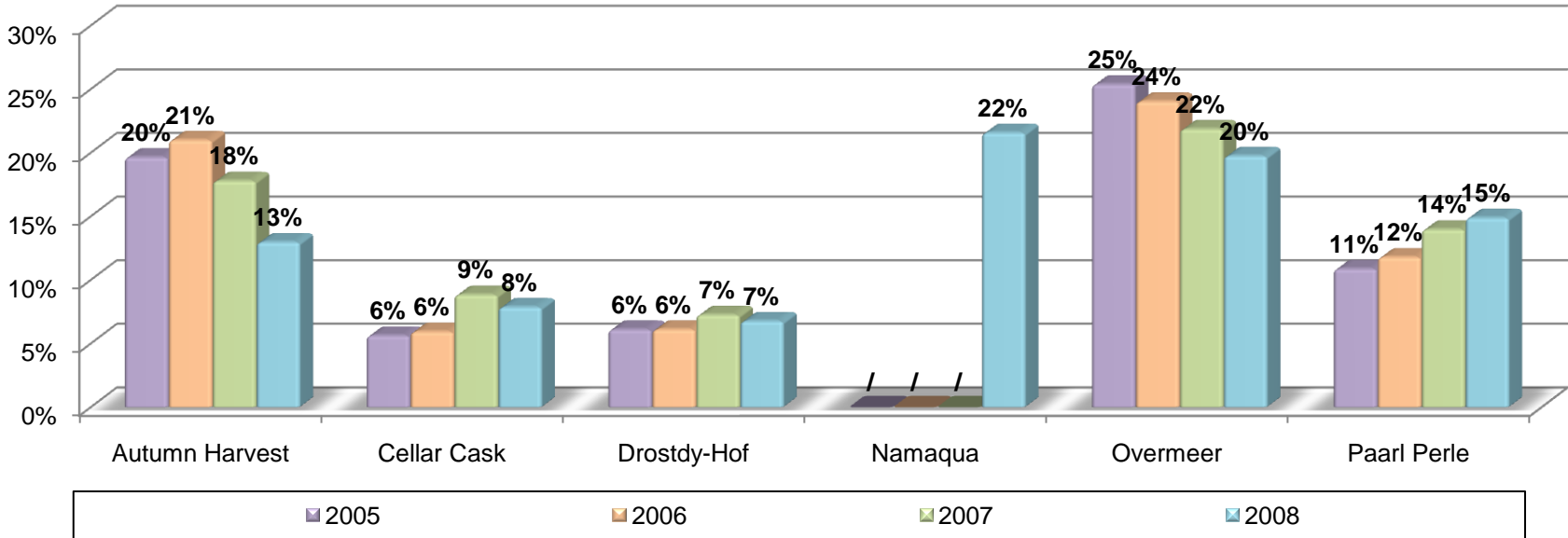
SCREENSHOTS FROM REPORT



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

SAMPLE FROM REPORT: BRAND PENETRATION

Which one brand of table wine - in boxes/ jugs do you consume most often?

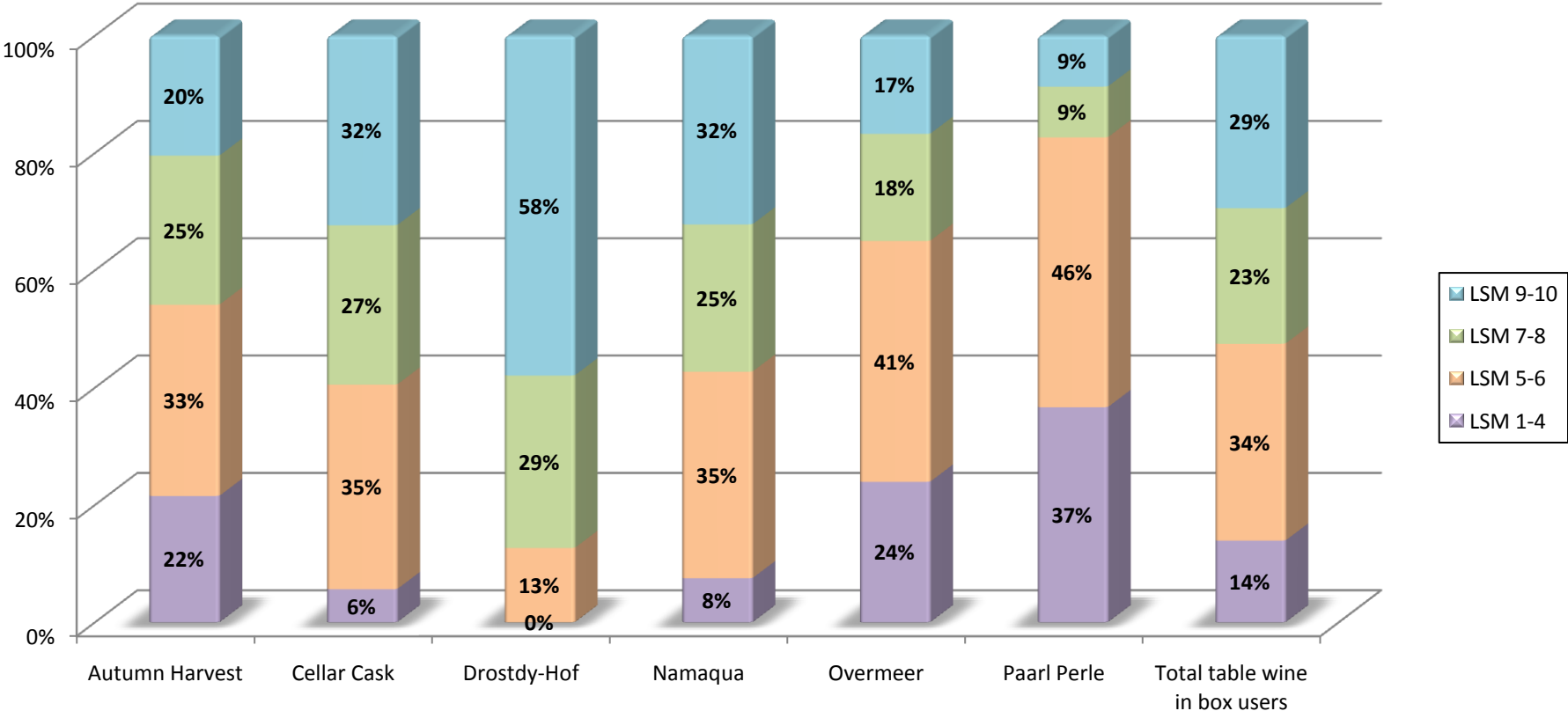


- In 2008, Namaqua was the market leader with a 22% brand penetration across South Africa
- Autumn Harvest brand penetration has declined from 20% in 2005 to 13% in 2008 compared to Paarl Perle which increased from 11% in 2005 to 15% in 2008

Source: AMPS 2008B
 Sample Sizes : 21 083 (total); 1728 (brand consumed most often)
 Note: all figures based on weighted numbers

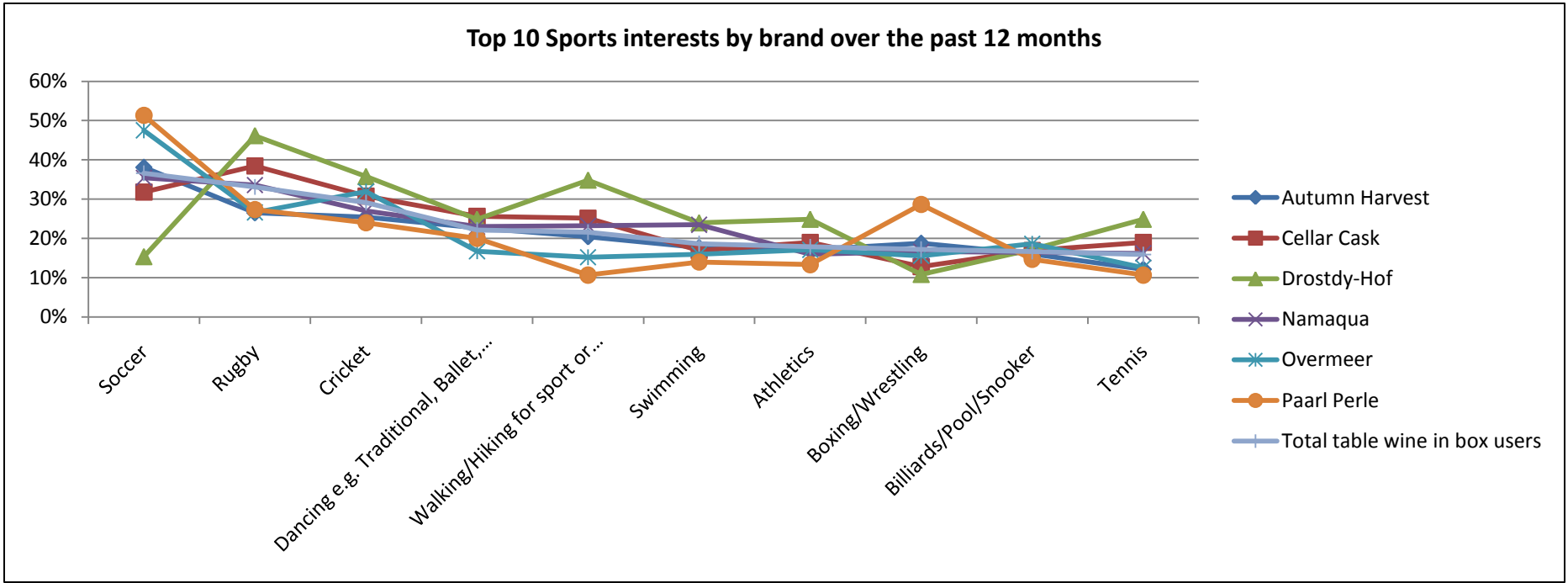
SAMPLE FROM REPORT: BRAND PROFILE: LSM

LSM profile of table wine in box/ jug brands



- 58% of Drostdy-Hof consumers are LSM 9-10 compared to 9% of Paarl Perle consumers
- 46% of Paarl Perle consumers are in LSM 5-6

SAMPLE FROM REPORT: SPORTS INTERESTS (TOP 10)



- The most popular sports interests among all consumers were Soccer, Rugby and Cricket
- In 2008 the most popular sports interests among Drostdy – Hof consumers were Rugby, Cricket and Walking/ Hiking
- For Paarl Perle, the most popular sports were Soccer and Boxing/Wrestling

SAMPLE FROM REPORT: TOP 3 MONTHLY MAGAZINES

Autumn Harvest	Percentage
BONA	4%
Rooi Rose	4%
True Love	3%

Cellar Cask	Percentage
True Love	7%
Sarie	7%
Rooi Rose	7%

Drostdy-Hof	Percentage
car	11%
Sarie	9%
House & Garden	8%

Namaqua	Percentage
Sarie	8%
True Love	7%
Rooi Rose	7%

Overmeer	Percentage
BONA	5%
Rooi Rose	5%
True Love	4%

Paarl Perle	Percentage
True Love	6%
BONA	6%
Amakhosi	4%

Total users	Percentage
True Love	5%
Sarie	5%
Rooi Rose	5%

- The most popular monthly magazines among total consumers is True Love (5%), Sarie (5%) and Rooi Rose (5%)
- Among Paarl Perle consumers the top three monthly magazines in 2008 were True Love (6%), Bona (6%) and Amakosi (4%)

Source: AMPS 2008B (Adults 16+)

Note: all figures are based on AMPS sample of brand consumed most often users; sample size: 1728 (see beginning of section for breakdown)

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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