A W R I

The Australian Wine Research Institute

Insights on how Chinese consumers choose wine and the influence of tasting on consumer preferences

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Factors influencing choice

The Australian Wine Research Institute

Research objectives

❖ to determine the influence of different messages about Australia and shelf information on choice of red wine by Chinese consumers

❖ to understand the impact of taste experience on re-purchase decision

Choice experiment: shelf simulation

Choice experiment: Attributes and levels

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	Attribute	Levels
1	Closure	screw cap, natural cork
2	Label style	Prestigious, Stately, Modern classic, Modern contemporary, Modern vibrant, Elegant contemporary, Eclectic, Light-hearted
3	Medals	Gold, none
4	Grape variety	Cabernet Sauvignon, Shiraz, Pinot Noir, Dry Red Wine
5	Country	France, China, Australia, Italy
6	Price	¥70, ¥130, ¥190, ¥250, ¥310, ¥370, ¥430, ¥490
7	Store rating	99 points, 92 points, none
8	Expert rating	96 points, 89 points, none

Example of a designed shelf

假设您正在一家葡萄酒专营店内，打算购买一瓶葡萄酒回家与伴侣或朋友饮用。

您最有可能购买以下哪种葡萄酒？

(请在下方选择一瓶葡萄酒)

| 意大利 ￥310 赤霞珠 店长评分 95分 | 法国 ￥490 黑比诺 专家评分 92分 | 澳洲 ￥370 设拉子 专家评分 92分 | 法国 ￥70 黑比诺 店长评分 99分 专家评分 96分 | 澳洲 ￥310 黑比诺 店长评分 95分 |

So how do Chinese choose wine?

Status quo: Attribute importance
(control group)

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Attribute	%
Store rating	31
Expert rating	28
Country	18
Price	13
Grape variety	5
Label	3
Medal	2
Closure	0

Country Preference

Communication: Australia Messages
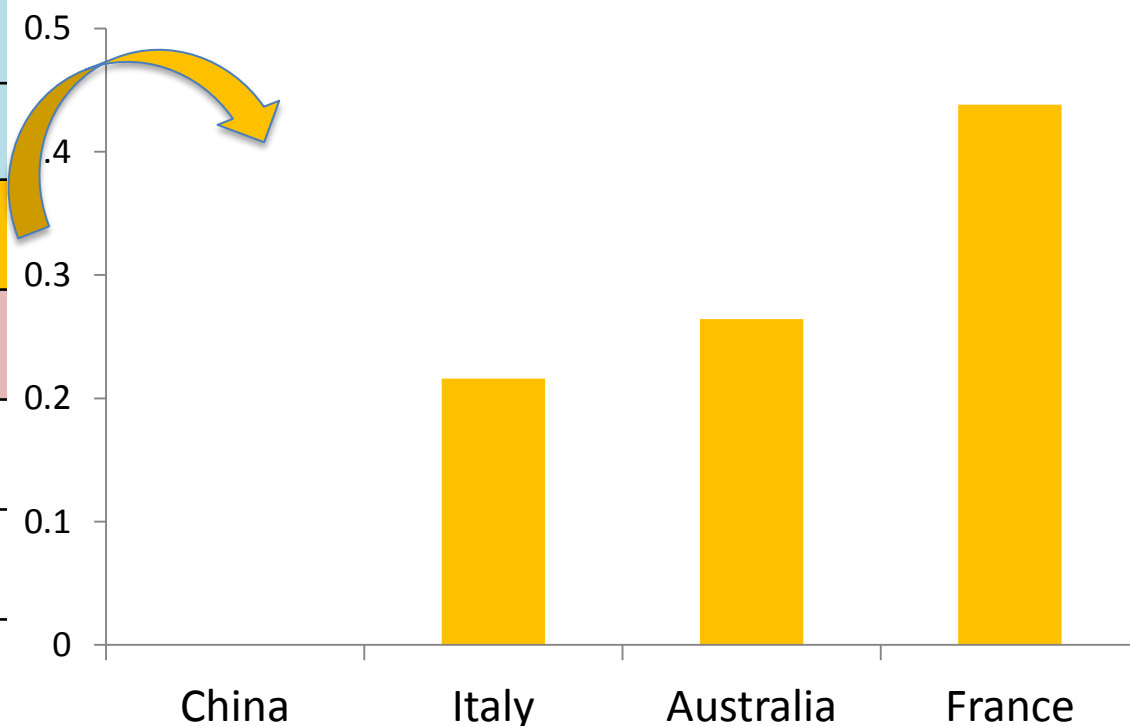
❖ communication messages about Australia presented in advertorial-type articles that can have a positive impact on the choice of Australian wines over French or Chinese wine

❖ used to influence consumers at the point of purchase to choose Australian wines

1 - A great place to visit

WINE MAGAZINE

澳大利亚
一个绝佳的旅游国度

最近的调查显示澳大利亚拥有景色最佳而且交通最便利的沙滩。在2012年的一次重大旅游评选活动中,大利亚被评为最美丽、休闲和友好的旅游目的地。

澳大利亚的气候怡人,一些主要城市的周边均有海洋和沙滩,因此当地人的业余生活主要集中在室外活动。澳大利亚常年气候温和,阳光明媚;良好的生活环境赋予了当地人友善热情的性格,富有现代感的当地居民热忱地欢迎来自各地的游客。在澳大利亚,室外咖啡厅和餐厅随处可见,游客可以在路边的咖啡厅或是餐厅里歇息,在观赏自然美景的同时开始安排游玩下一个澳大利亚迷人景点的行程计划。

"澳大利亚被评为最美丽、休闲和友好的旅游目的地。"

WINE MAGAZINE

澳大利亚
纯净无污染

最近的调查显示澳大利亚是全球最干净、污染最少、绿化最好的国家之一。科学家们一致认可澳大利亚出产的食品和葡萄酒产品的受污染程度为全球最低。澳大利亚拥有大量的再生能源和干净的能源资源,即使是大城市也拥有清新透亮的空气、纯净的水源和不受污染的土壤。

无污染的自然环境意味着澳大利亚出口的食品和葡萄酒均属于全球最健康、品质最佳行列。拥有清新的空气、纯净的水源和不受污染的土壤的澳大利亚以出产新鲜、健康、和纯天然的食品而闻名全球。

" 澳大利亚以出产新鲜、健康、和纯天然的食品而闻名全球。"

3 - Safe food and wine

WINE MAGAZINE

" 政府严格的管制条例

为澳大利亚食品和葡萄酒赢得了安全、

可信和高品质的美誉。**"**

澳大利亚
安全食品和葡萄酒

最近的调查显示澳大利亚出产的食品和葡萄酒属于全球最安全的行列。政府严格的管制条例为澳大利亚食品和葡萄酒赢得了安全、可信和高品质的美誉。澳大利亚的肉类、海鲜、和葡萄酒产品在出口前必须经过严格的实验室检测。您可以绝对信任澳大利亚葡萄酒酒标上面的信息,放心享用百分之百又来自澳大利亚本土葡萄酿制而成的葡萄酒。如果一瓶澳大利亚葡萄酒的酒标上面显示酿制该葡萄酒的葡萄品种,那么可以保证瓶内装的就是与其酒标信息相符合的来自相应产区的葡萄酒。所有来自澳大利亚的葡萄酒在出口前还需要经过一个独立的专家团队的品评,不达标的葡萄酒一律无法出口。

AUSTRALIAN MADE

WINE MAGAZINE

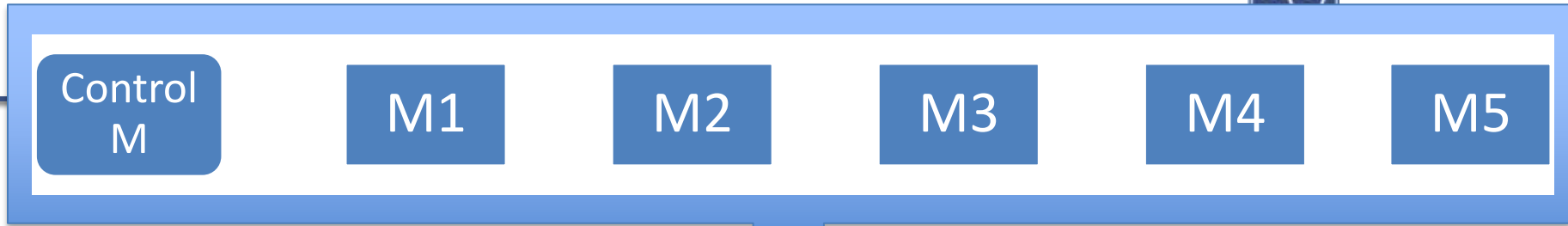有机种植不但能提高咖啡豆品质还能更好的保护生态环境。

为此当地很多种植户开始逐步发展有机种植园。

南美洲咖啡豆
走向绿色

南 美洲的巴西和哥伦比亚是全球最大的咖啡豆生产国。随着全球对咖啡豆需求量急剧上升,咖啡豆种植户开始大量地使用化肥和杀虫剂;不过现在一股新的风气正开始在当地得到推广蔓延。

有机种植不但能提高咖啡豆品质还能更好的保护生态环境,为此当地很多种植户开始逐步发展有机种植园。咖啡的盲品调查显示,有机咖啡的风味比非有机咖啡要更为醇厚饱满。咖啡在中国的销量在接下来的时间里将得到快速的发展。有机种植技术的广泛使用确保了消费者可以安心地享用风味更佳的咖啡,也同时更好地保护了生态环境。

RESULTS

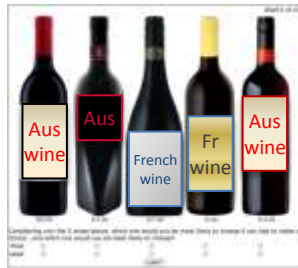# Attribute importance – Stage 1

Attribute	%
Country	48
Store rating	19
Expert rating	16
Price	11
Grape	3
Label	2
Medal	1
Closure	0

Country Preference
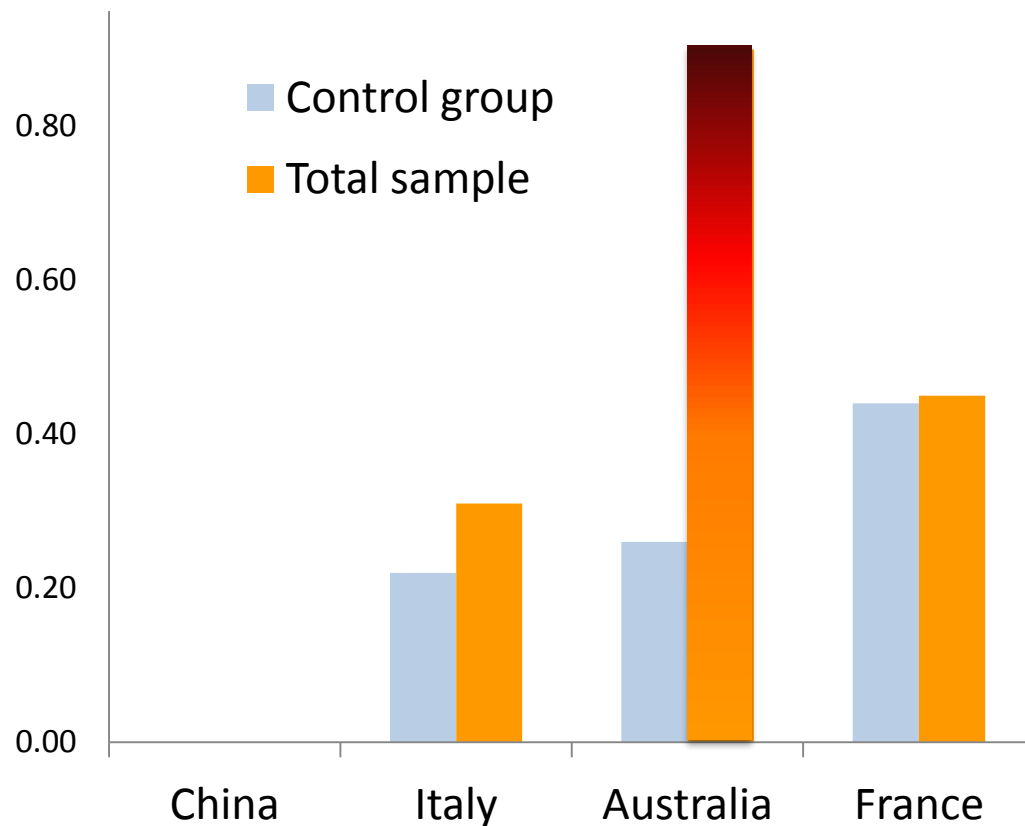
Preferred price

Price-demand curve
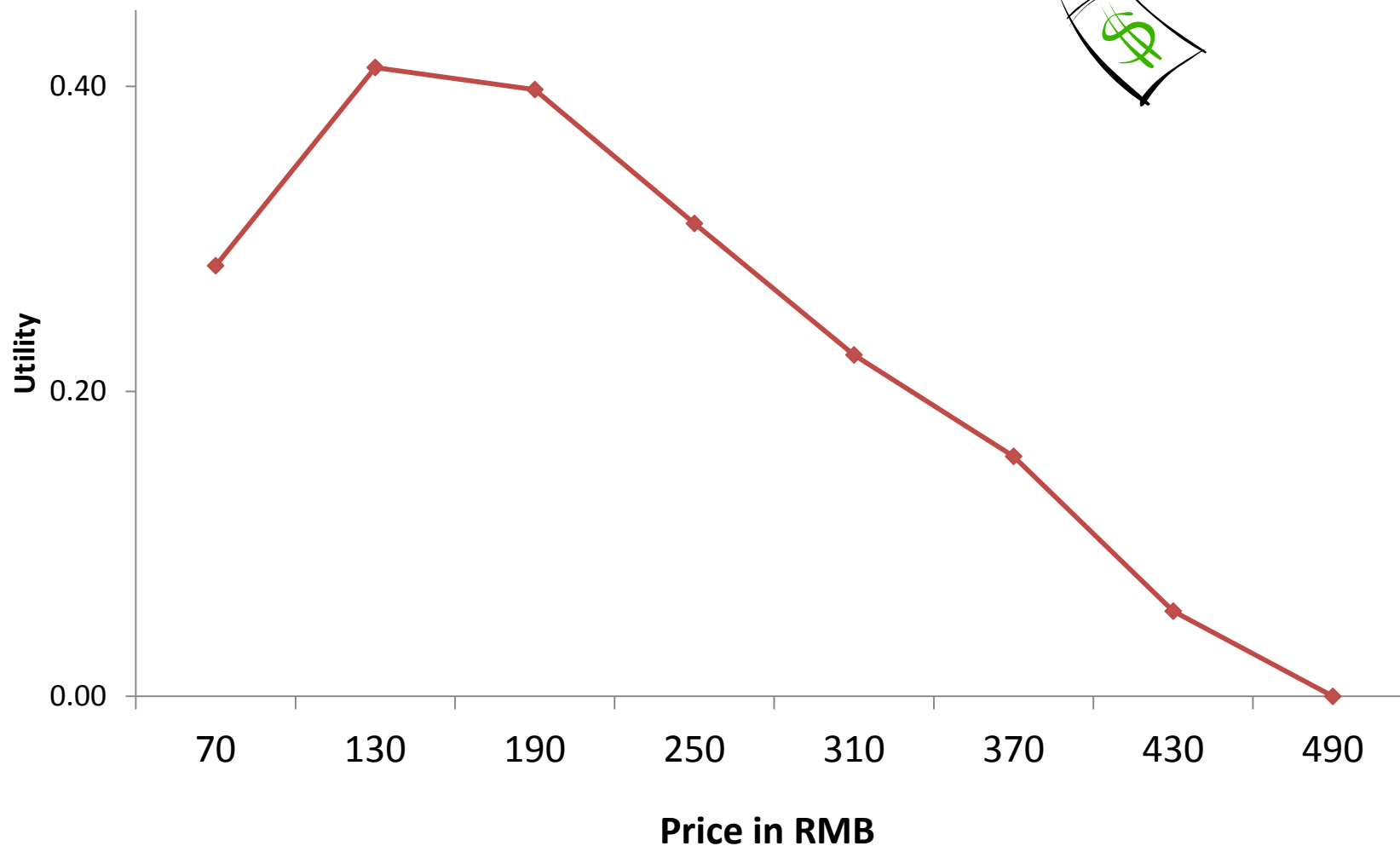
Most effective article
Australia: The best Tasting Wines in the World

The Australian Wine Research Institute

WINE MAGAZINE

中国消费者最喜欢
澳大利亚葡萄酒的风味。

Recent research has shown that Chinese wine consumers prefer the taste of Australian wines to French and other countries' wines. Hundreds of Chinese wine consumers tasted wines from the major wine producing countries without knowing where they were from. **Australian wines were rated the best tasting of all the wines by the Chinese consumers.**

Australian winemakers look for the wine styles that people prefer, and in the sunny, warm climate ideal for grape growing, are able to produce them using modern winemaking techniques. Australian wines are approachable and understandable to Chinese consumers. Australia is leading the world in producing top wines enjoyed by wine consumers in China and all around the globe.

Australia: Clean and unpolluted

The Australian Wine Research Institute

WINE MAGAZINE

Recent research has shown Australia to be one of the cleanest and least polluted countries in the world. Scientists found the lowest levels of known pollutants in Australian food and wine products of any country in the world. Australia has abundant renewable, clean energy resources, and even the largest cities have smog-free crystal-clear air, pure water supplies, and unpolluted soils.

The lack of pollution means that Australia's major food and wine exports are some of the cleanest and healthiest in the world. **Australia is renowned as a producer of fresh, healthy and natural food and wine** from its clean water, clean air and clean soil.

澳大利亚以出产新鲜、健康、和纯天然的食品而闻名全球。

Least effective article
Australia: A great place to visit

WINE MAGAZINE

Recent research has shown Australia to have the best and most accessible beaches for tourists. In a major poll of travel agents in 2012, **Australia was listed as one of the most beautiful, relaxed and friendly places to visit**.

The Australian lifestyle is focused on the outdoors due to the great climate and ocean surrounding major cities. The sunny, warm weather for most of the year has led to a modern and easy-going population eager to entertain visitors. Outdoor cafes and restaurants are everywhere, so people can relax while viewing the natural attractions and plan their visit to many interesting places the country has to offer.

澳大利亚被评为
最美丽、休闲和友好的
旅游目的地。

Choice experiment: 8 label styles

The Australian Wine Research Institute

Prestigious

Stately

Modern Classic

Modern Contemporary

Choice experiment: 8 label styles

Modern Vibrant

Elegant Contemporary

Eclectic

Light Hearted

Label preference

Elegant	0.19
Prestigious	0.12
Light hearted	0.12
Stately	0.11
Eclectic	0.04
Modern classic	0.03
Modern contemporary	0.03
Modern vibrant	0.00

Label association exercise

F2 (26.90 %)

F1 (39.34 %)

Stately

Authentic

Safe

Classic

Reliable

Traditional

Mainstream

Healthy

Light Hearted

Inexpensive

Uninteresting

Informal

I like this label

Prestigious

High quality

Modern Vibrant

Modern Classic

Elegant Contemporary

Prestigious

Elegant

Upper class

Cheerful

Imaginative

Modern

Eclectic

Modern Contemporar
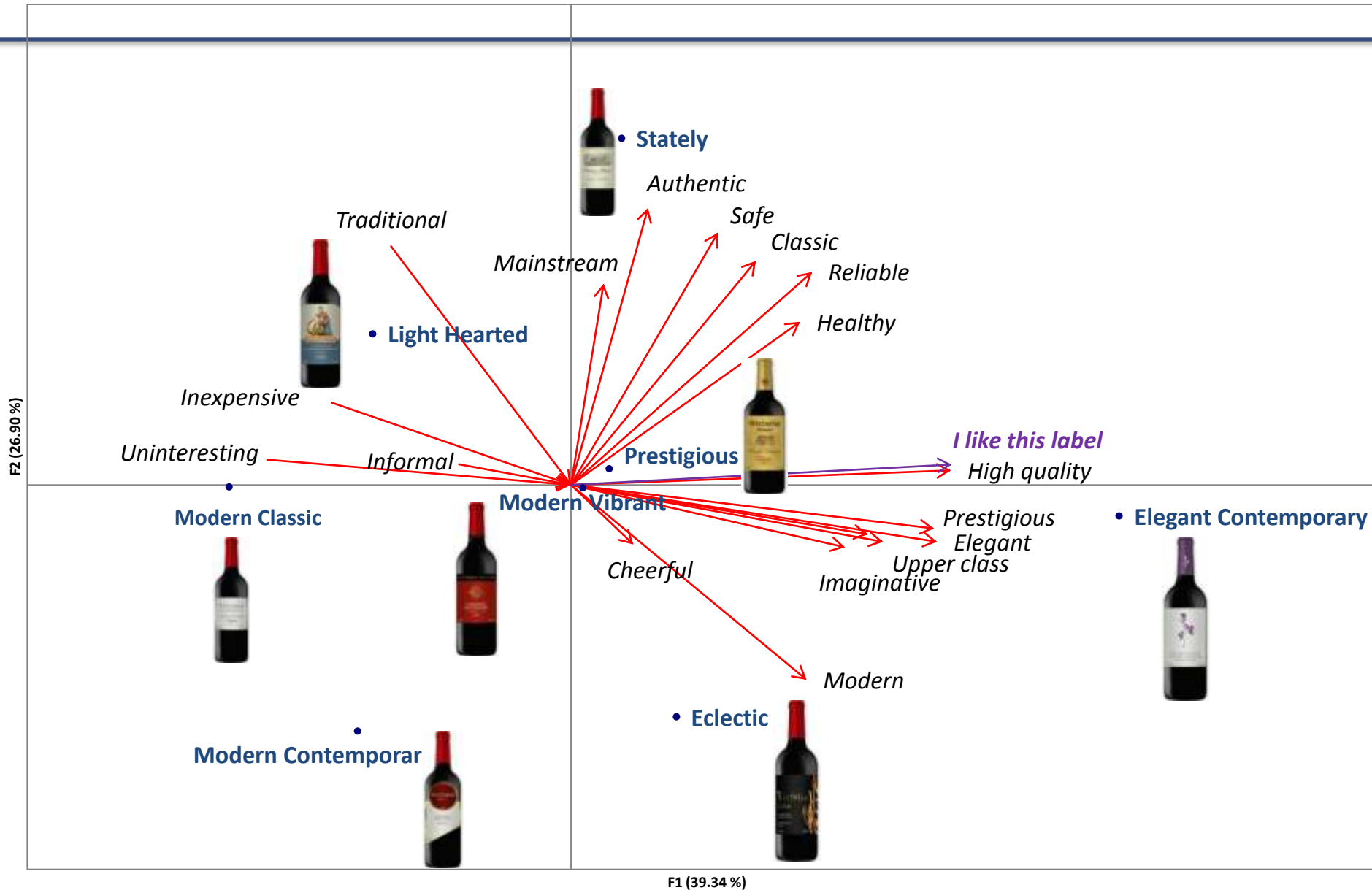
The Australian Wine Research Institute

RESULTS
After ~10 days

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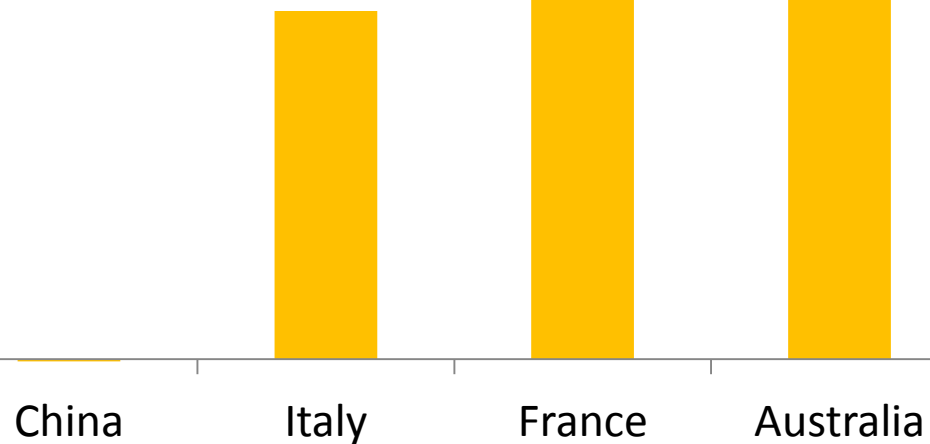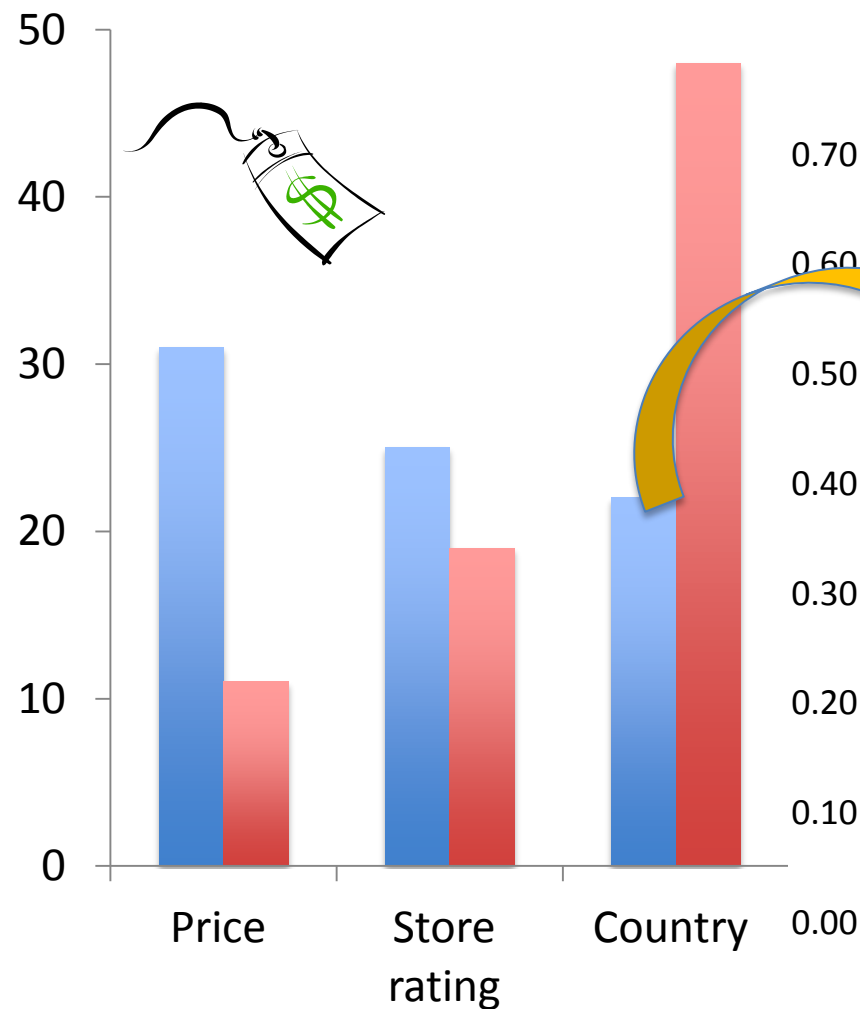
Who were the consumers?

- ❖ Local residents, Chinese ethnic group
- ❖ Living in Beijing, Guangzhou and Shanghai, minimum n=500 per city
- ❖ Buyers of imported wine (at least once every 6 months)
- ❖ Drink grape red wine at least once per month
- ❖ 40% female, 60% male

Consumer profile (n=1670)

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Age

37%	57%	6%
18-30	31-45	46-65

Household income

3%	8%	20%	68%
RMB 4,000 - 5,999	RMB 6,000 - 7,999	RMB 8,000 - 9,999	> RMB 10,000
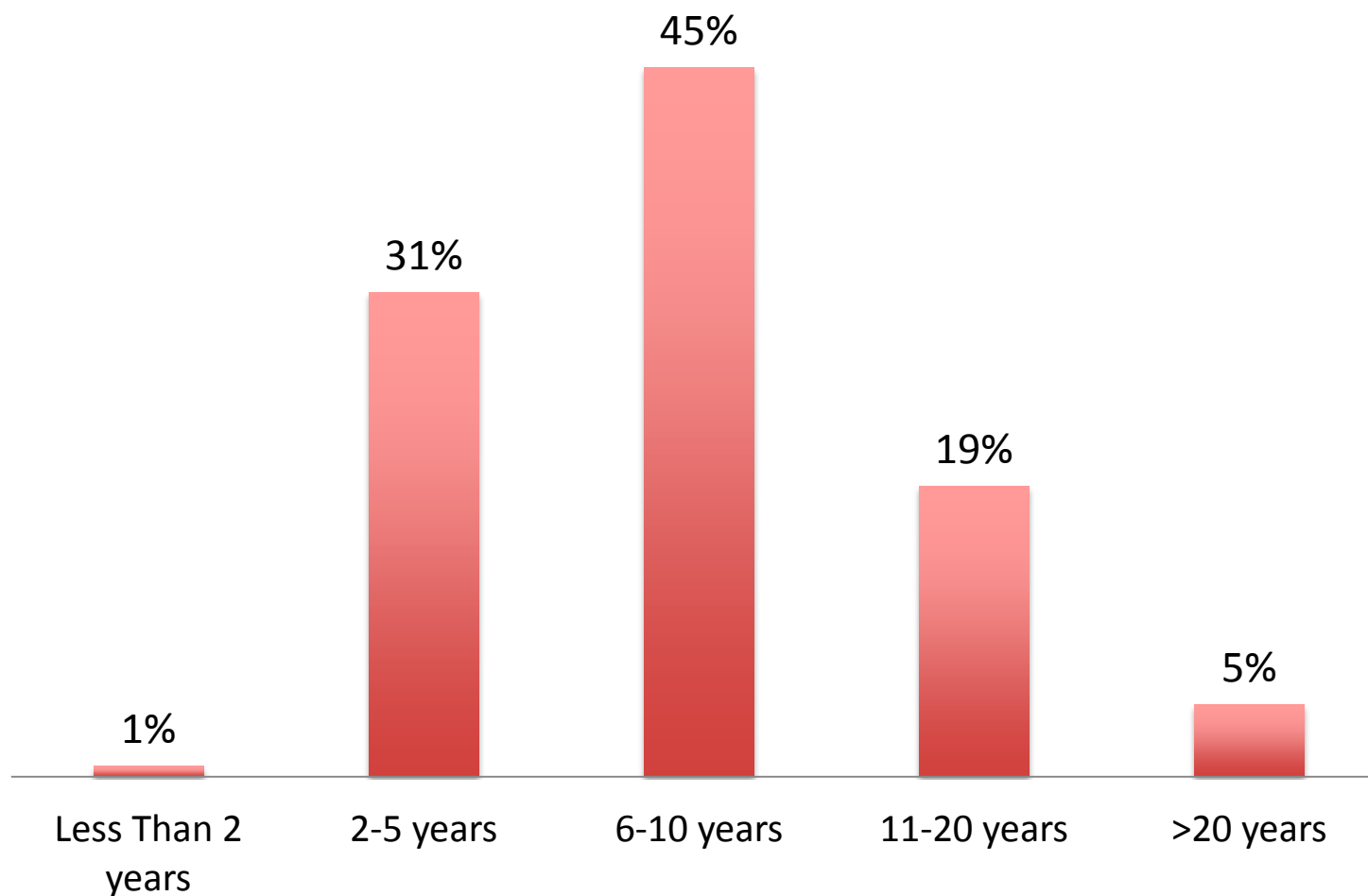
Grape red wine purchases in the last three months

The Australian Wine Research Institute

From...

- Argentina 3%
- SAfrica 2%
- Spain 3%
- Chile 5%
- US 5%
- Italy 12%
- China 24%
- France 24%
- Australia 22%

How much? (%)

7- <100RMB	100-149 RMB	150-199 RMB	200-249 RMB	250-300 RMB	>300RMB
13	18	20	19	15	15
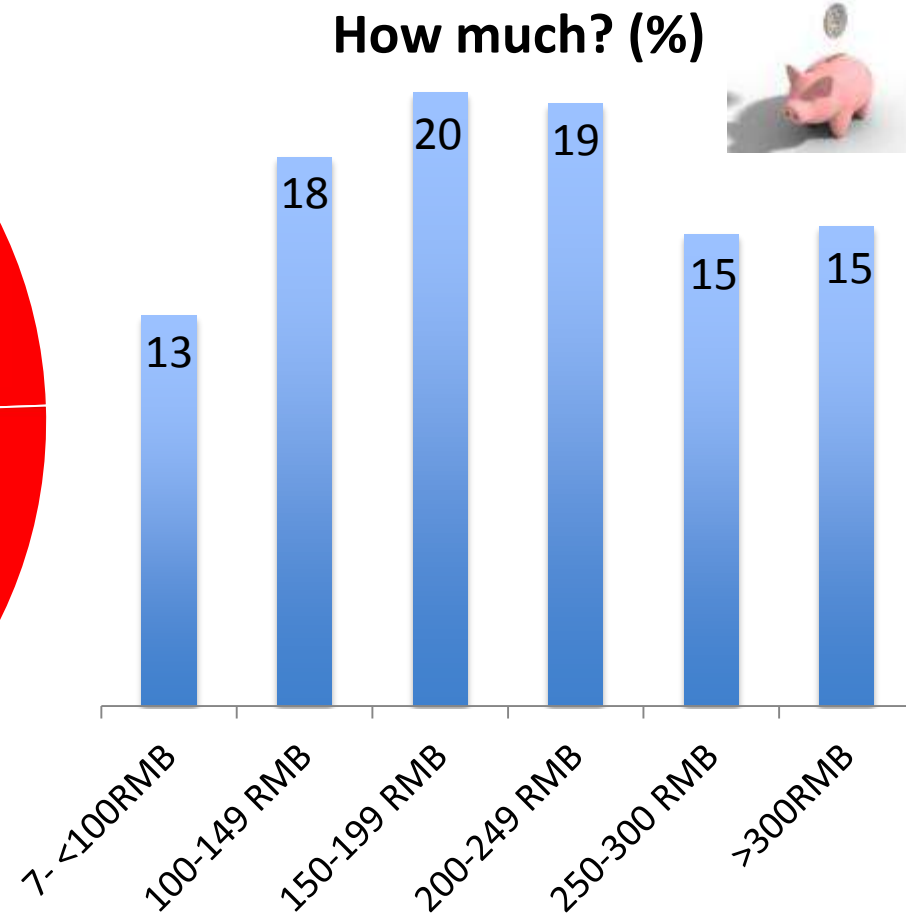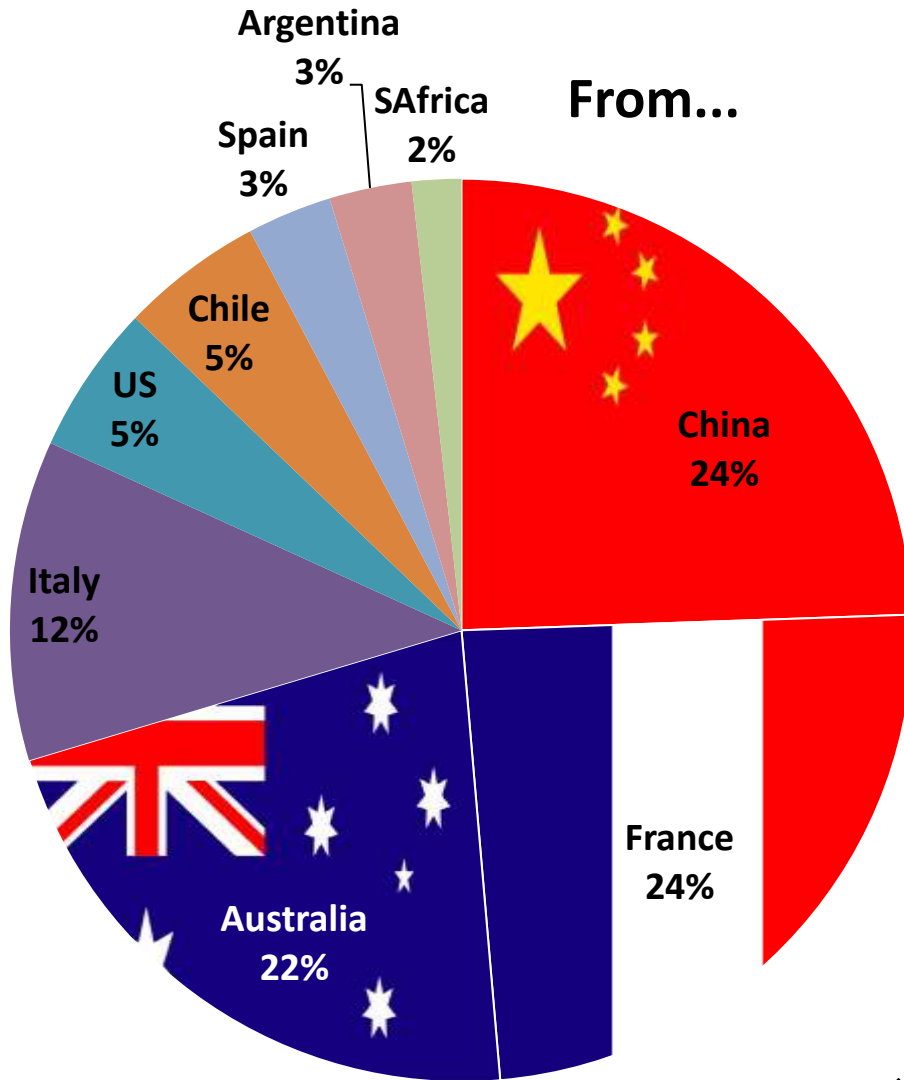
Where did they buy wine in the past 6 months?

Wine shop	86%
Hypermarket	85%
Shopping mall	58%
Internet	53%
Duty free	51%
Overseas	26%
Supermarket	25%
Distributor	22%
Discount supermkt	17%
Corner shop	6%

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Statement	Percentage
Grape red wine is good for my health	97%
Drinking wine makes me feel sophisticated	95%
Wine makes a great gift	95%
I always pay great attention to the flavor of the wine I am drinking	94%
I like to try new and different wines	89%
I prefer to drink wines recommended by friends	85%
I like to drink wine to get a buzz. It makes me feel good	85%
I don't mind purchasing wine that has a screw cap closure	84%
You can buy good wines without spending a lot of money	69%
I think of wine mostly for drinking with dinner	67%
Sometimes I am overwhelmed by the variety of brands there are…	62%
The best wines are always the most expensive	57%
I generally buy brands of wine that I know	56%
I consider wine an everyday beverage	55%
I don't like to open a bottle when I am by myself	43%
I typically only drink wine while entertaining guests	33%
Wine is too expensive to enjoy very often	18%

Influence of taste

Code	Price RMB
NV Great Wall Cab-Mer	99
05 Changyu CabGern	207
05 Changyu Castel	368
08 Triennes Provence	231
09 Guigal Rhone	231
10 Rothschild Legende	350
10 Chateau Peyre-Lebade	363
12 SEA Shz-Cab	132
10 Coonawarra Cab	188
10 South Aus Cab	208
10 Barossa GSM	248
11 MargRiv Cab-Mer	290
10 Yarra Shz-Vio	331
11 Barossa Shz	396
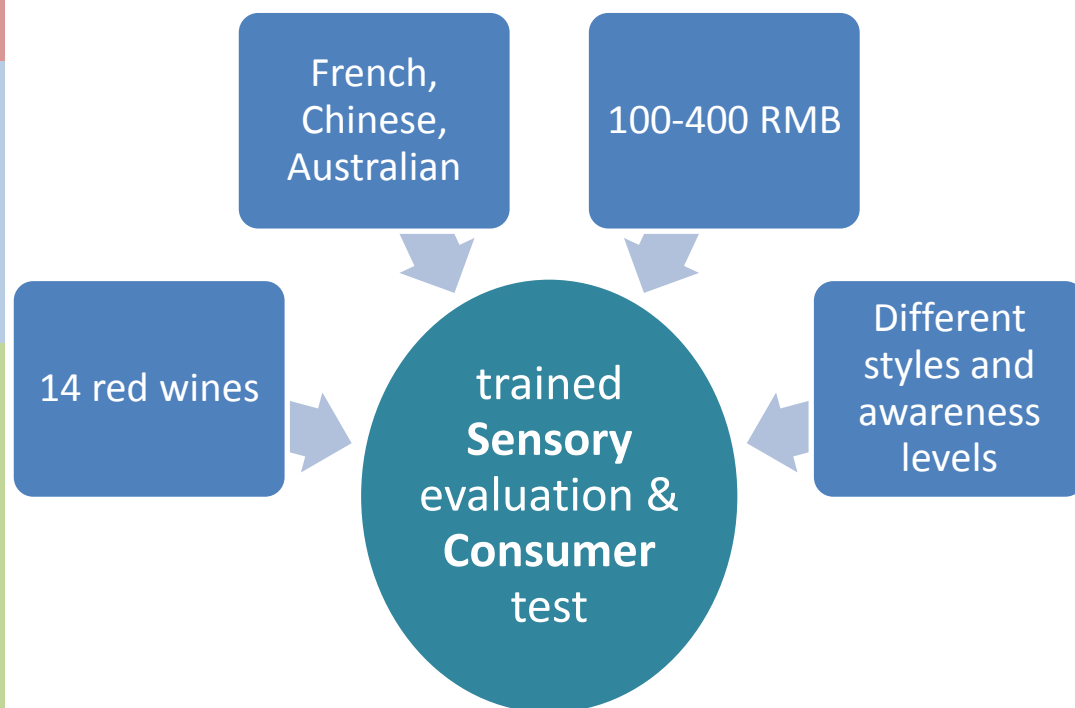
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French, Chinese, Australian

100-400 RMB

14 red wines

Different styles and awareness levels

trained **Sensory** evaluation & **Consumer** test

The Australian Wine
Research Institute
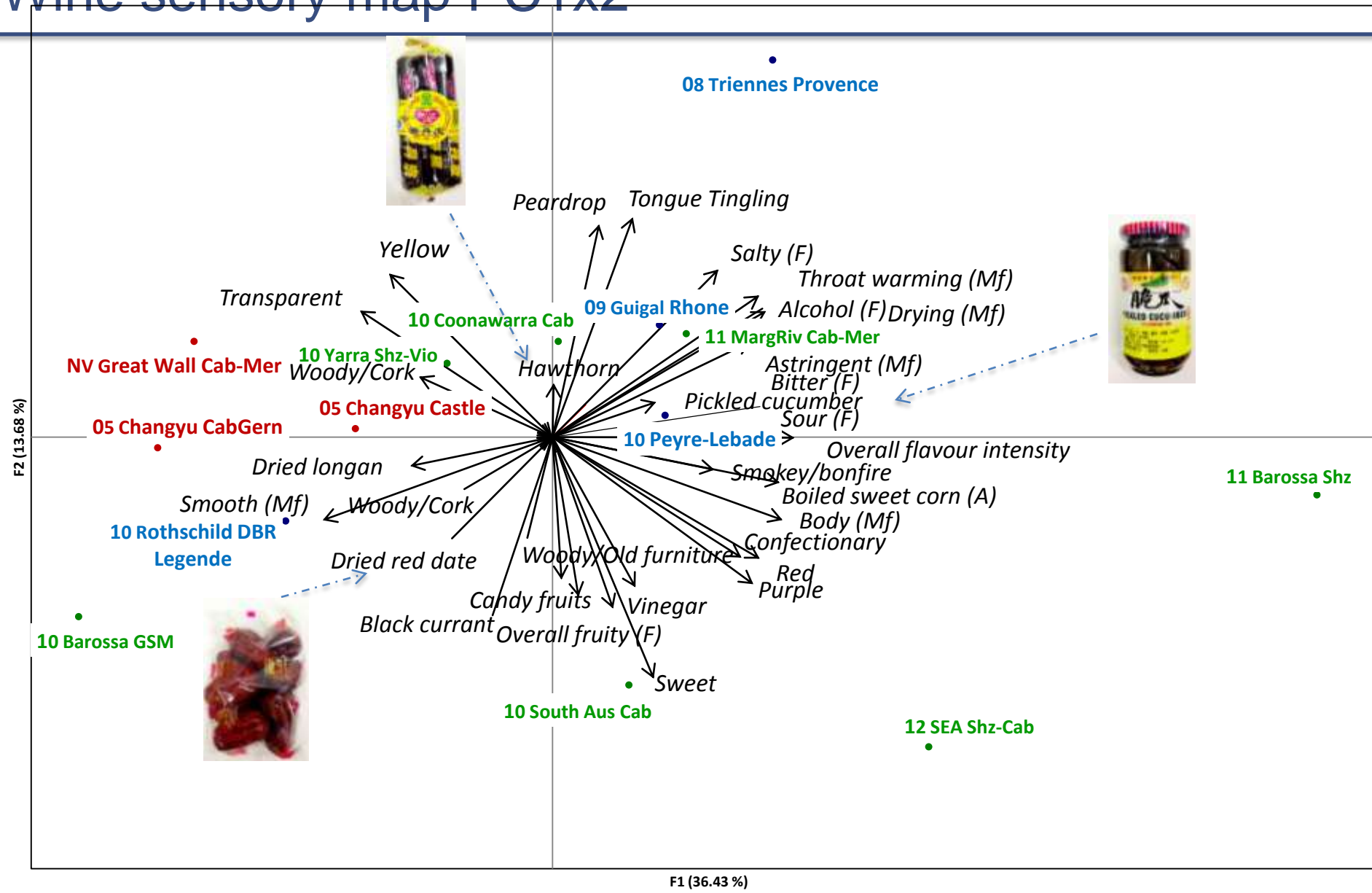
The Australian Wine Research Institute
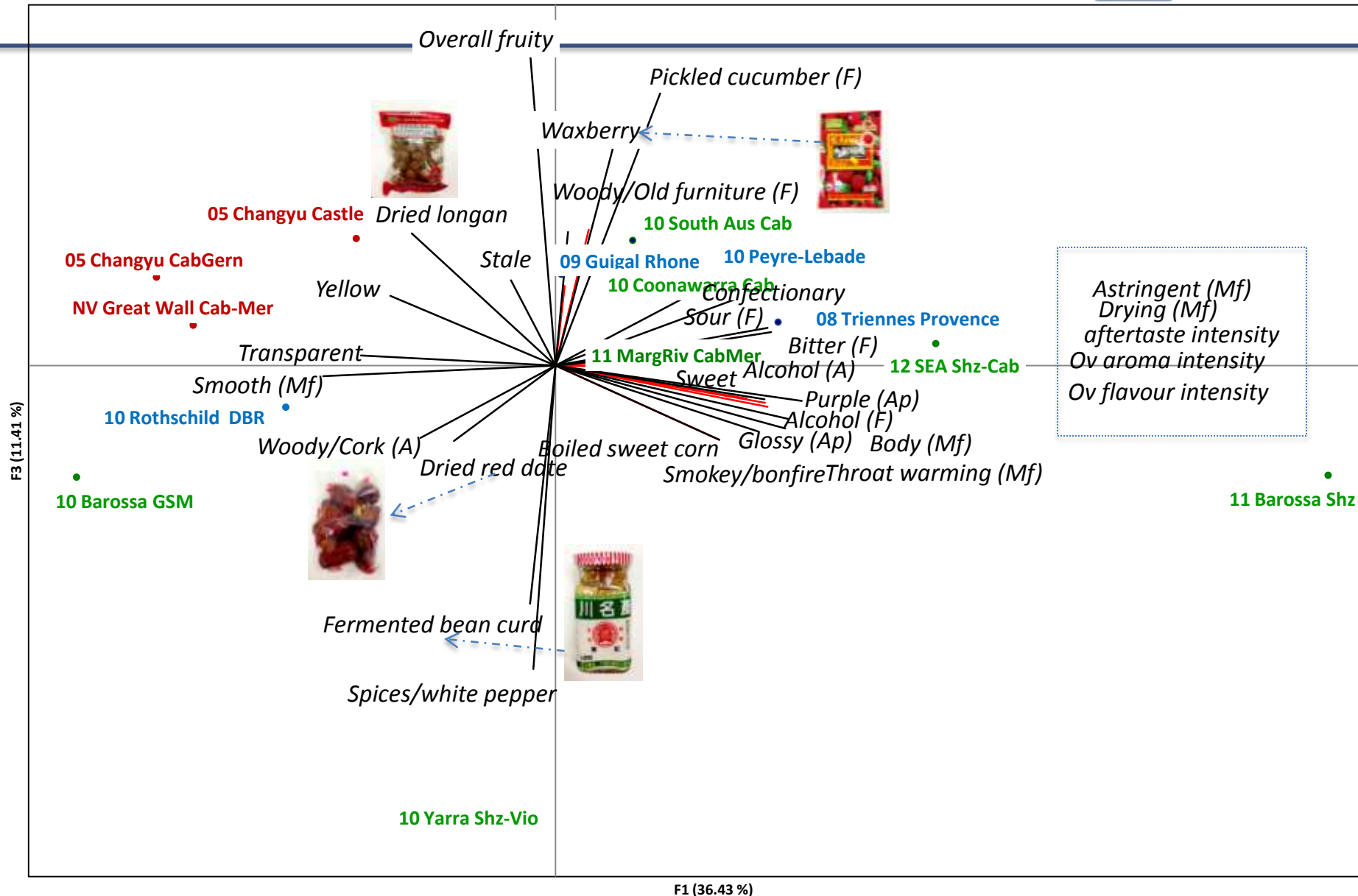
Sensory experiment: Consumer test

The Australian Wine Research Institute

- ❖ 304 imported red wine consumers from Shanghai and Beijing
- ❖ 14 wines assessed over two sessions
- ❖ Presentation of wines:
  - ✓ blind (3-digit code)
  - ✓ Informed (picture of wine bottle and price)
- ❖ Consumers rated overall liking and purchase intent for each wine

Overall Liking and Purchase Intent Informed (total population)

The Australian Wine Research Institute

Overall Liking Informed
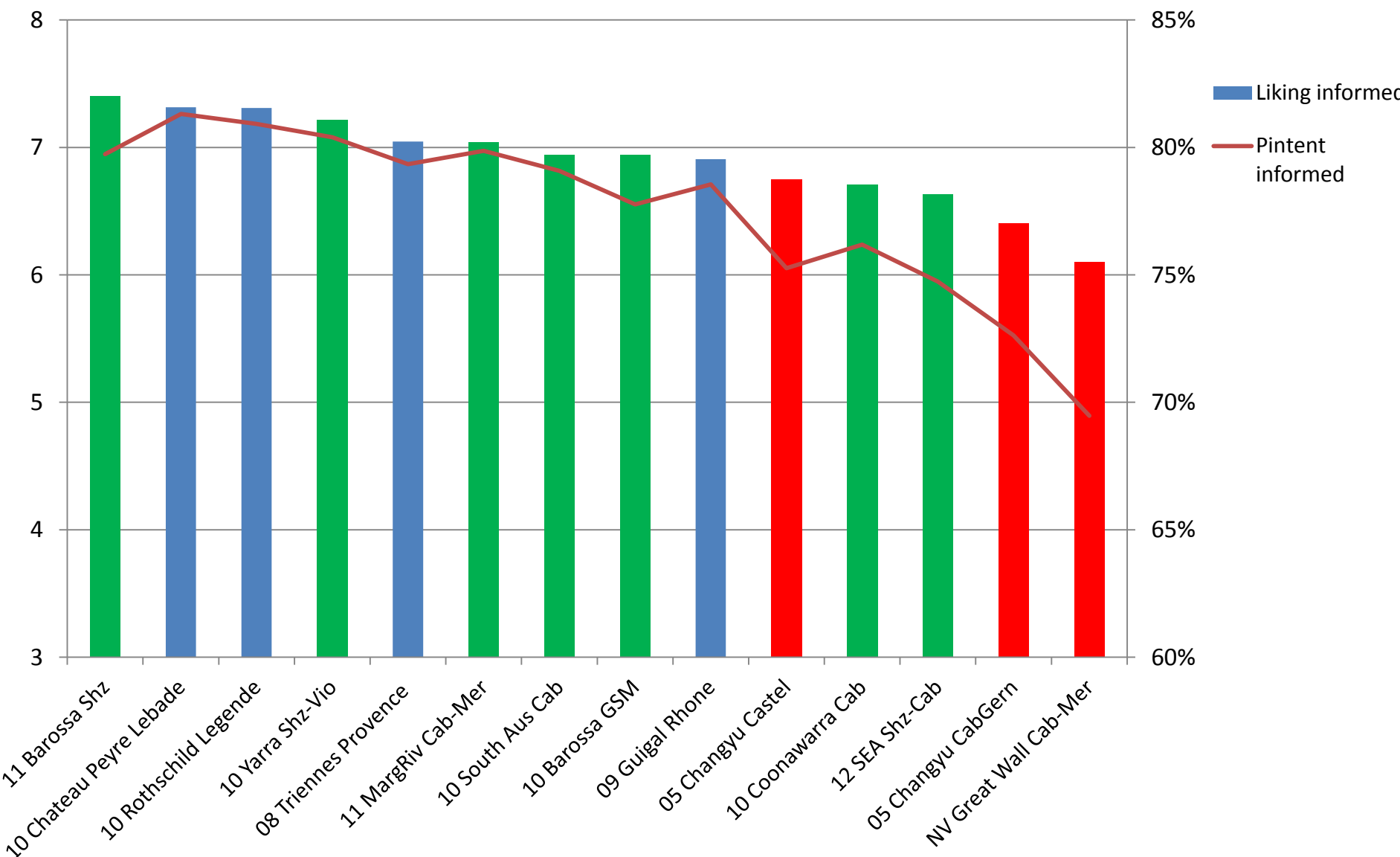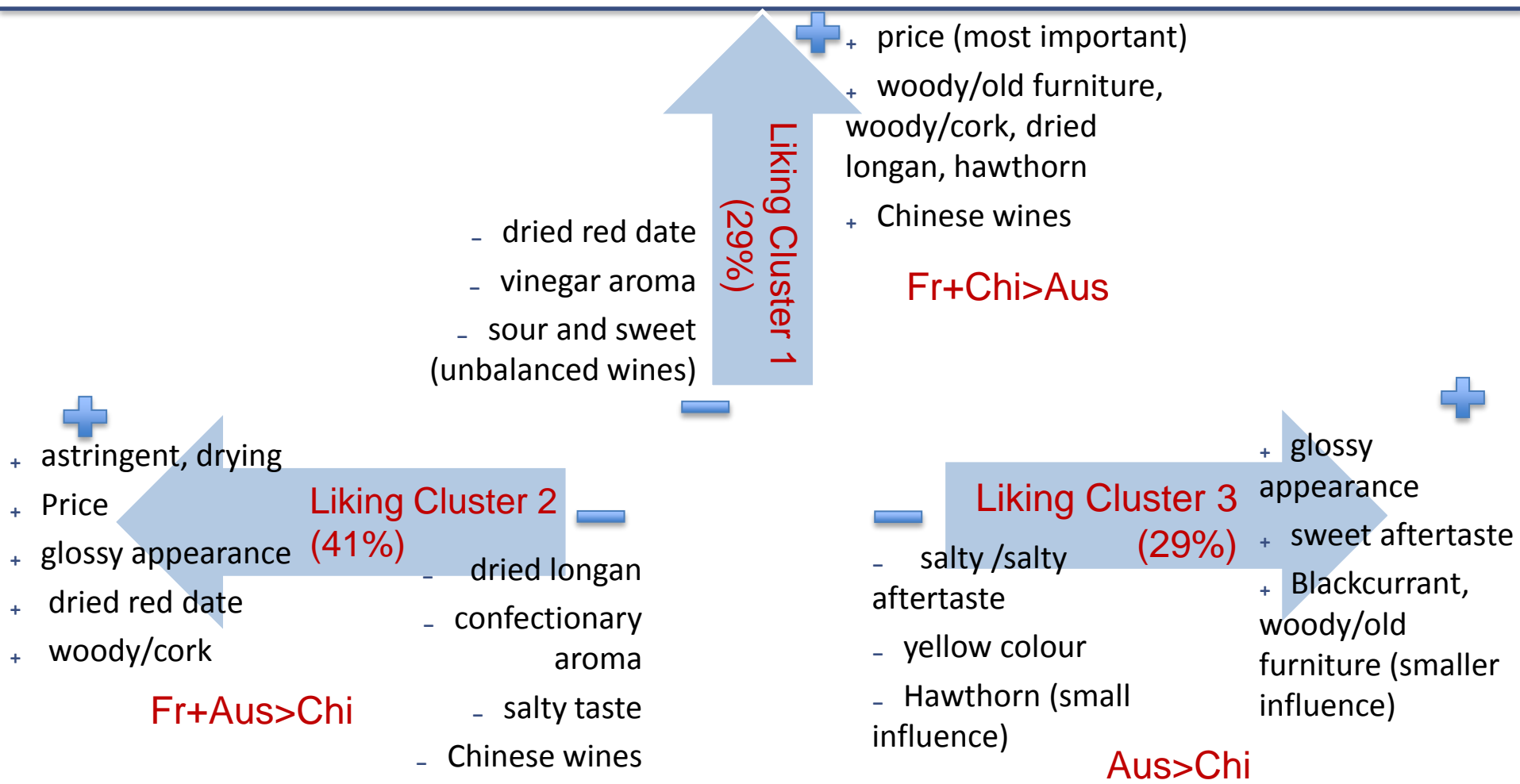## (total population)

❖ Positive drivers

  + Price (highest)

  + red colour

  + astringent, drying, throat warming

  + woody/cork, glossy appearance

❖ Negative drivers

  + salty

  + yellow colour

  + dried longan, vinegar aroma

  + sweet flavour, sweet confectionary aroma

❖ Country effect: Aus and France sig more liked than China

Informed liking

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Liking Cluster 1 (29%)

+ price (most important)
+ woody/old furniture, woody/cork, dried longan, hawthorn
+ Chinese wines

− dried red date
− vinegar aroma
− sour and sweet (unbalanced wines)

Fr+Chi>Aus

Liking Cluster 2 (41%)

+ astringent, drying
+ Price
+ glossy appearance
+ dried red date
+ woody/cork

− dried longan
− confectionary aroma
− salty taste
− Chinese wines

Fr+Aus>Chi

Liking Cluster 3 (29%)

+ glossy appearance
+ sweet aftertaste
+ Blackcurrant, woody/old furniture (smaller influence)

− salty /salty aftertaste
− yellow colour
− Hawthorn (small influence)

Aus>Chi

What are the factors influencing choice for Chinese consumers?

- ✓ **Ratings** and **shelf communication** – really important

    - ○ **Store rating** (99 points): most important

- ✓ **Price** 4th most important attribute when choosing a wine: **RMB 130 to 190**

- ✓ Low importance of label style with **modern designs disliked**

- ✓ Although 80% of consumers buy at least half of their wines under cork, **Closure** was the **least important attribute**

- ✓ **Reading an article about Australia** increased considerably Australian market share, **even after 10 days**

- ✓ Showing Chinese consumers **that they prefer the taste of Australian wine** is an effective way to **increase Australian market share**

Conclusions: Chinese usage and attitudes

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✓ **Australia** in the top three most consumed wines

- 24% China, 24% France and 21% Australia

✓ **One third** of the wine consumers have been drinking wine for **less than 5 years**

✓ **Wine shop** (86%) and **Hypermarket** (85%) are the most common sources of wine

✓ Only half of consumers consider wine an **everyday beverage** (no changes since 2008)

✓ **Health** and **sophistication** most important reasons to drink wine

Taste Liking Conclusions

Informed

- **Price** very important

- Cluster 3 (30%) **not driven by price** (lowest knowledge)

- One **stable** cluster: similar drivers **informed** and **blind** (plus price)

- No significant correlation between blind and informed liking or Pintent (p=0.43)

- Total sample of consumers: **11 Barossa Shiraz** most liked, **Great Wall 3 Stars** least liked

Thanks to:

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Brooke Halkett – *Lion Nathan*

Anna Lawrence – *McWilliam's Wines*

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UniSA | Ehrenberg-Bass Institute for Marketing Science

Australian Government
Australian Grape and Wine Authority