

The Australian Wine Research Institute



Understanding Chinese Consumers' Red Wine Preferences

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Background and objectives

- Background

China represents one of the most attractive opportunities for Australian wine. The lack of a fully established and integrated domestic Chinese wine industry, combined with Chinese wine consumption trends, suggest that China will be a major importer of wine for many years to come.

- Objectives

Explore Chinese consumer responses to commercial red wines with characterised sensory properties, in order to guide future development of red wines for this market.

Integrate sensory, analytical and consumer preference data to determine drivers of preference for the Chinese red wine consumer and for identifying and targeting specific preference clusters.

Methodology



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Three types of testing were conducted



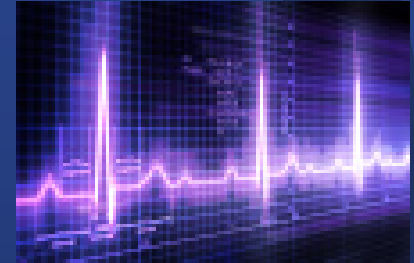
Trained Sensory Panel (May-June)

- AWRI external panel developed a descriptive language for 20 red wines, followed by data collection



Consumer Testing

- CLT (Central Location) (June-July)
- 310 Chinese consumers
- 14 red wines
- 2 consecutive days
 - Product evaluation
 - Usage and attitudes



Chemical measures

- Alcohol, RS, acid, pH, tannin, 4 EP, sulfur compounds, fermentation and oak volatiles...



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Sensory Descriptive Analysis: 20 red wines

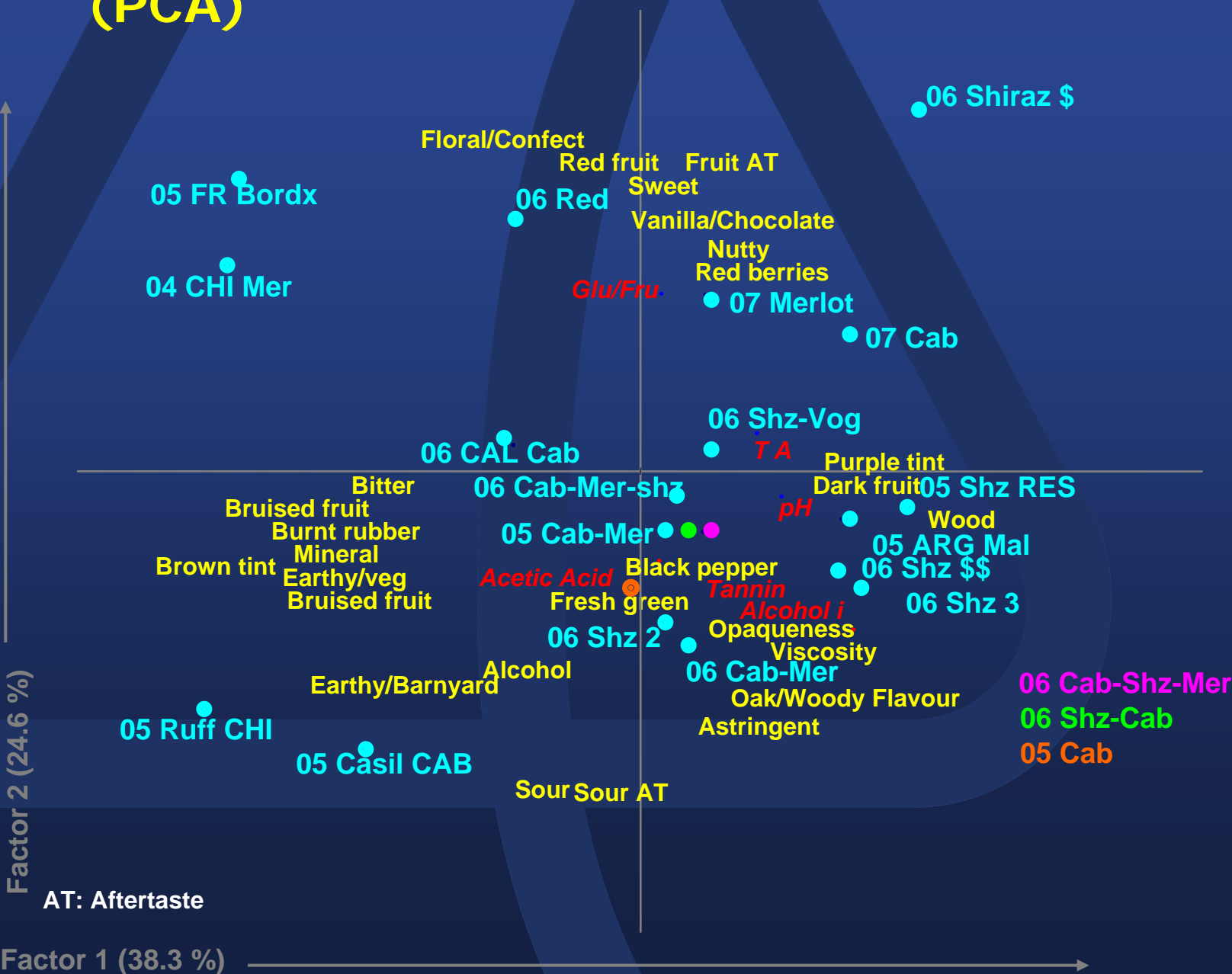
This map illustrates a two dimensional view of the sensory product differences.

Products are placed next to other products with which they are most similar.

Product Principal Components Analysis (PCA)



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Products tested in CLT

14 red wines were selected based on the broadest sensory space



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Wine	Code	AU\$
2007 SEA Merlot	07 MER	7
2007 SEA Cabernet	07 CAB	7
2006 SEA Red	06 RED	8
2006 SEA Shiraz-Cabernet	06 SHZ-CAB	10
2006 SA Shiraz-Viognier	06 SHZ-VOG	10
2006 SEA Shiraz	06 SHZ \$	10
2005 SA Cabernet	05 CAB	13
2006 McLaren Vale Shiraz	06 SHZ \$\$	14
2004 Dragon Seal Merlot (China)	04 Chi MER	15
2006 California Cabernet (USA)	06 Cal CAB	15
2005 Norton Reserva Malbec (Argentina)	05 Arg MAL	16
2006 Margaret River Cabernet-Merlot	06 CAB-MER	17
2006 SA Cabernet Blend - Cab-Shz-Mer	06 CAB-MER-SHZ	19
2005 Mouton Cadet Bordeaux (France)	05 Fr BRDX	20





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Consumer test – what do the Chinese want?

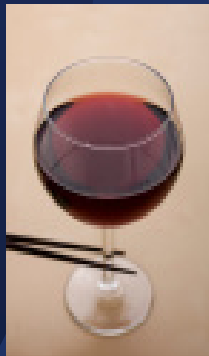


Who were the consumers?



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- Three major metropolitan markets - Shanghai, Beijing and Guangzhou
- Screening criteria:
 - **Red wine drinkers:** drink red wine at least once per week, buy bottled wine occasionally/ frequently from two price points at 65 RMB plus
 - **100% Chinese ethnic** group living or working in the city where the test will be conducted
 - 40% female, 60% male
 - 20% of new-to-wines (less than two years drinking wine)
 - Do not work for manufacturer or distributor of alcoholic beverages, marketing, marketing research, advertising
 - Have not participated in any other study concurrently or recently (last three months)
 - For women: not pregnant

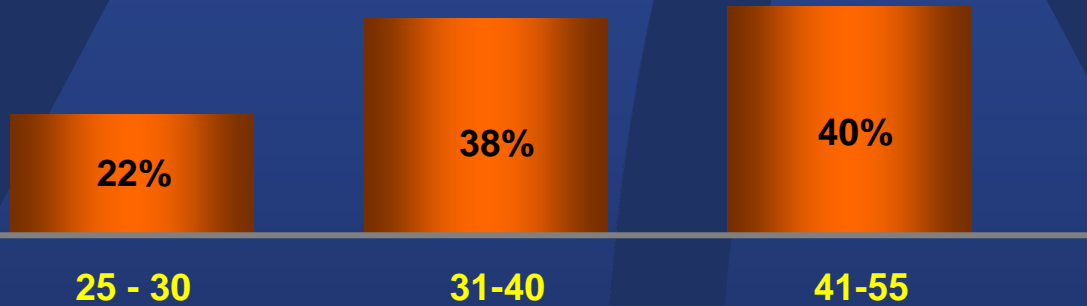




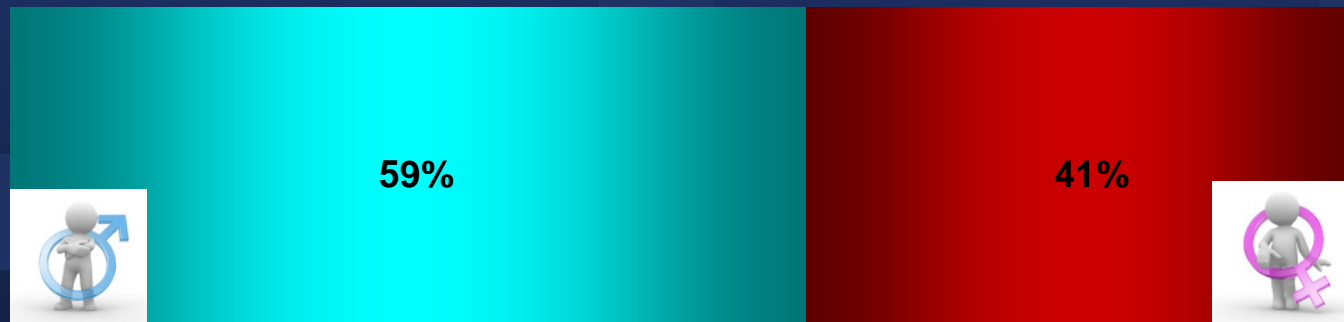
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Consumer profile- Age and Gender

Age



Gender

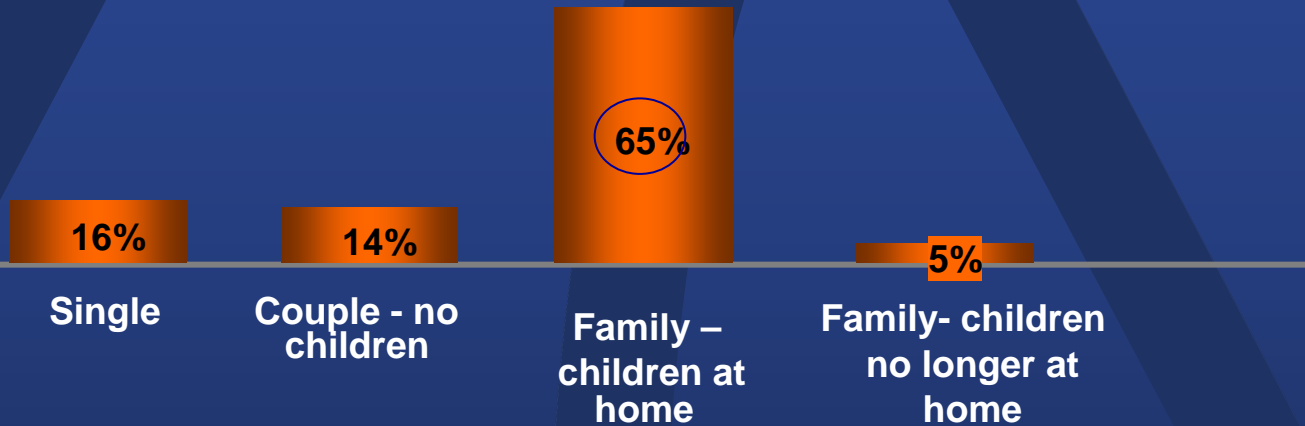




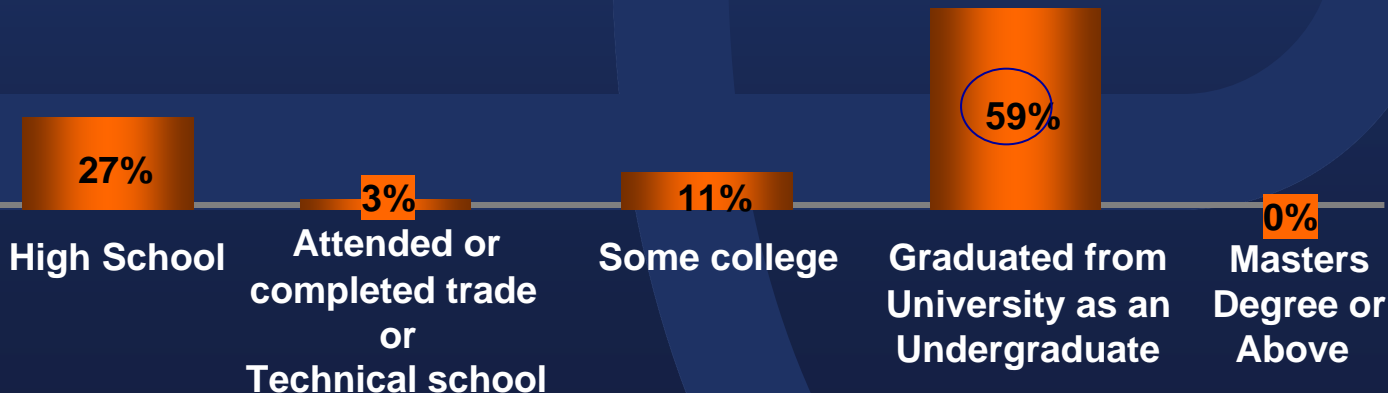
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Consumer profile

What is your life stage?



What was the last level of schooling that you completed?





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Consumer profile – household income

Which of the following best describes your household income per month?



- Average estimated income for urban residents – RMB 8472
- RMB 1000 = 175 AUD



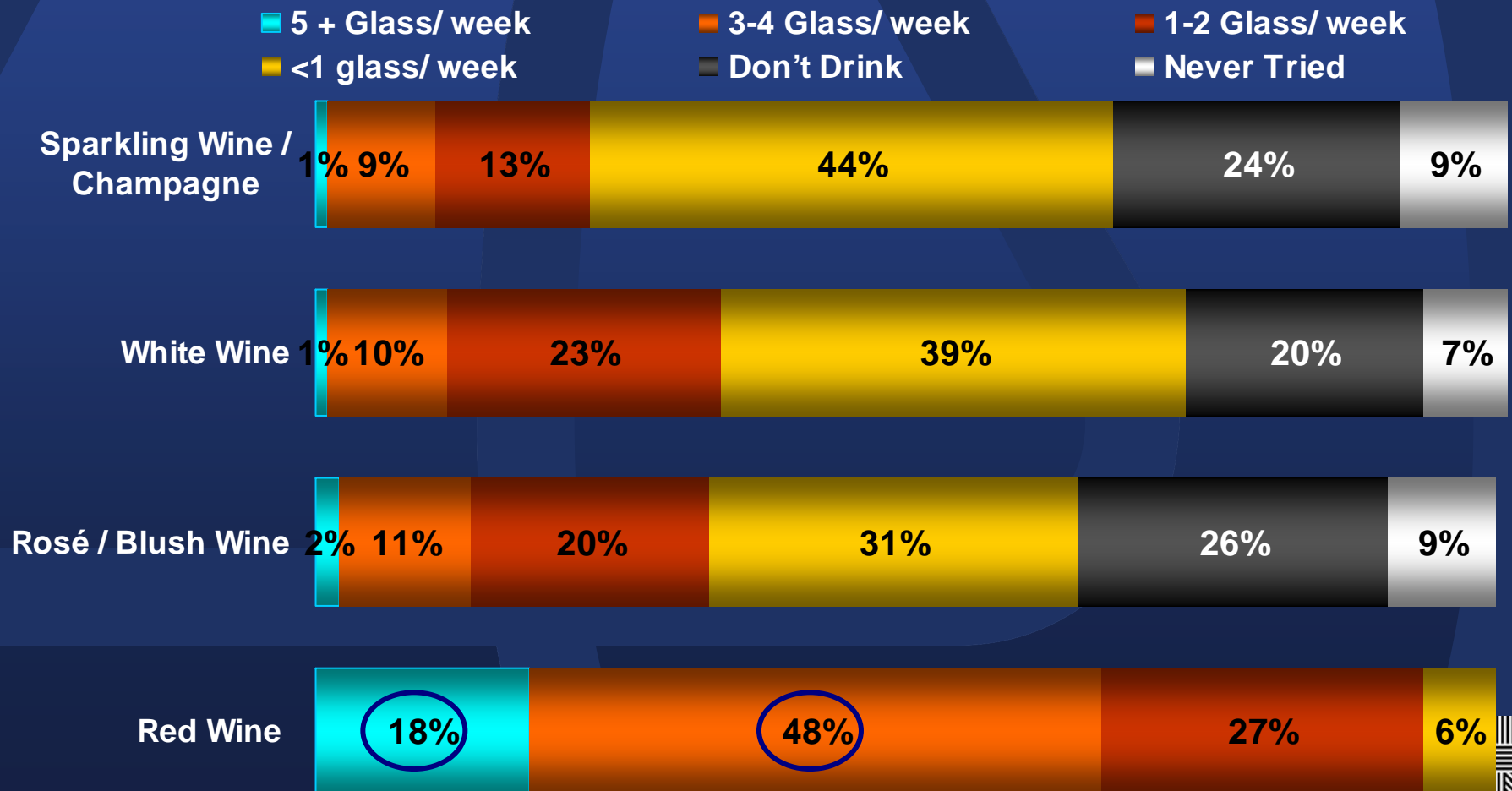


WRI

What do they drink?

In an average week, how much wine do you drink of the following types of wine?

The majority of consumers were frequent red wine consumers, with over 60% stating they consume at least three glasses a week or more



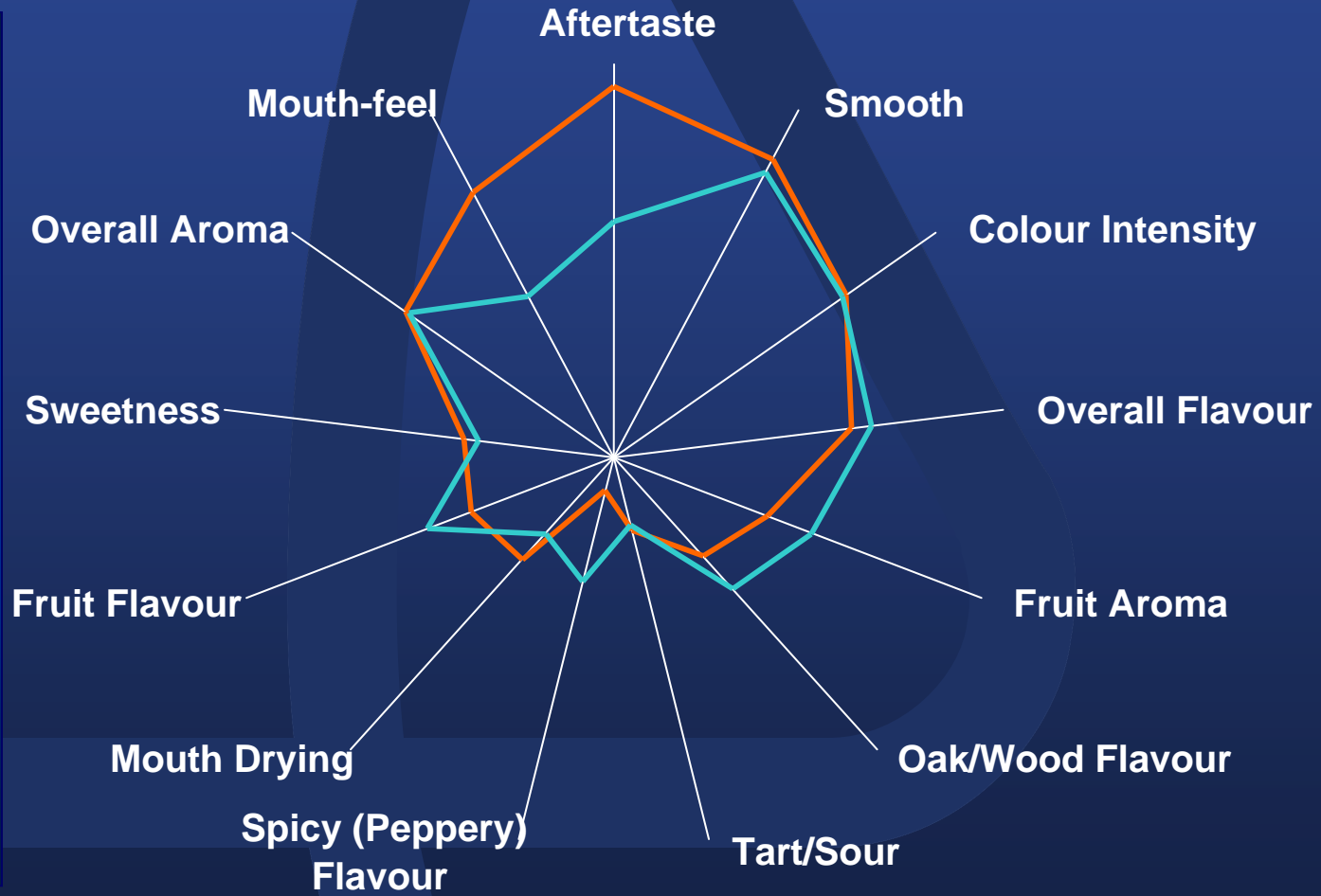
My ideal red wine....

My ideal red wine is/has.... Please mark the boxes that most closely describe your ideal red wine.



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Before tasting the wines, consumers were asked to describe their ideal wine. Chinese consumers reported to prefer more intense aftertaste, with less fruit aroma/flavour, oaky and spicy flavour than Australian consumers.



— Chinese consumers (n=310)

— Australian consumers (n=216)

Scale: 2 - 6.5

Questionnaire example

Consumer acceptance CLT



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Probe

ID# _____ DATE: _____ NAME: _____ CODE: _____

RED WINE

1. Mark an "X" in the box next to the phrase that best describes your overall opinion about the wine you tasted.

	OVERALL OPINION
<input type="checkbox"/>	LIKE EXTREMELY
<input type="checkbox"/>	LIKE VERY MUCH
<input type="checkbox"/>	LIKE MODERATELY
<input type="checkbox"/>	LIKE SLIGHTLY
<input type="checkbox"/>	NEITHER LIKE NOR DISLIKE
<input type="checkbox"/>	DISLIKE SLIGHTLY
<input type="checkbox"/>	DISLIKE MODERATELY
<input type="checkbox"/>	DISLIKE VERY MUCH
<input type="checkbox"/>	DISLIKE EXTREMELY

2. If this wine were available where you normally shop, how likely would you be to purchase it?

	Definitely Would Not Purchase	Probably Would Not Purchase	Might or Might Not Purchase	Probably Would Purchase	Would Purchase
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

编号# _____ 日期: _____ 姓名: _____ 红葡萄酒 编码: 135

1. 请在最符合您对刚才品尝的红葡萄酒说法的旁边空格内打叉“X”。

总体评价
<input type="checkbox"/> 极其喜欢
<input type="checkbox"/> 很喜欢
<input type="checkbox"/> 有点喜欢
<input type="checkbox"/> 稍微喜欢
<input type="checkbox"/> 无所谓喜欢或不喜欢
<input type="checkbox"/> 稍微不喜欢
<input type="checkbox"/> 有点不喜欢
<input type="checkbox"/> 很不喜欢
<input type="checkbox"/> 极其不喜欢

2. 如果该葡萄酒在您通常购物的商店内有售, 您购买它的可能性有多大呢?

<input type="checkbox"/> 完全不会购买	<input type="checkbox"/> 可能不会购买	<input type="checkbox"/> 说不准是否会购买	<input type="checkbox"/> 可能会购买	<input type="checkbox"/> 完全会购买
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(LY) Bordeaux ☐

(Y) Mouton Cadet ☐

MARK ONE BOX

ally ☐

st tasted? (**MARK ONE BOX**)

eresting ☐ Thin & Light ☐

asted? (**MARK ONE BOX ONLY**)

106-140 RMB ☐ Over 140 RMB ☐



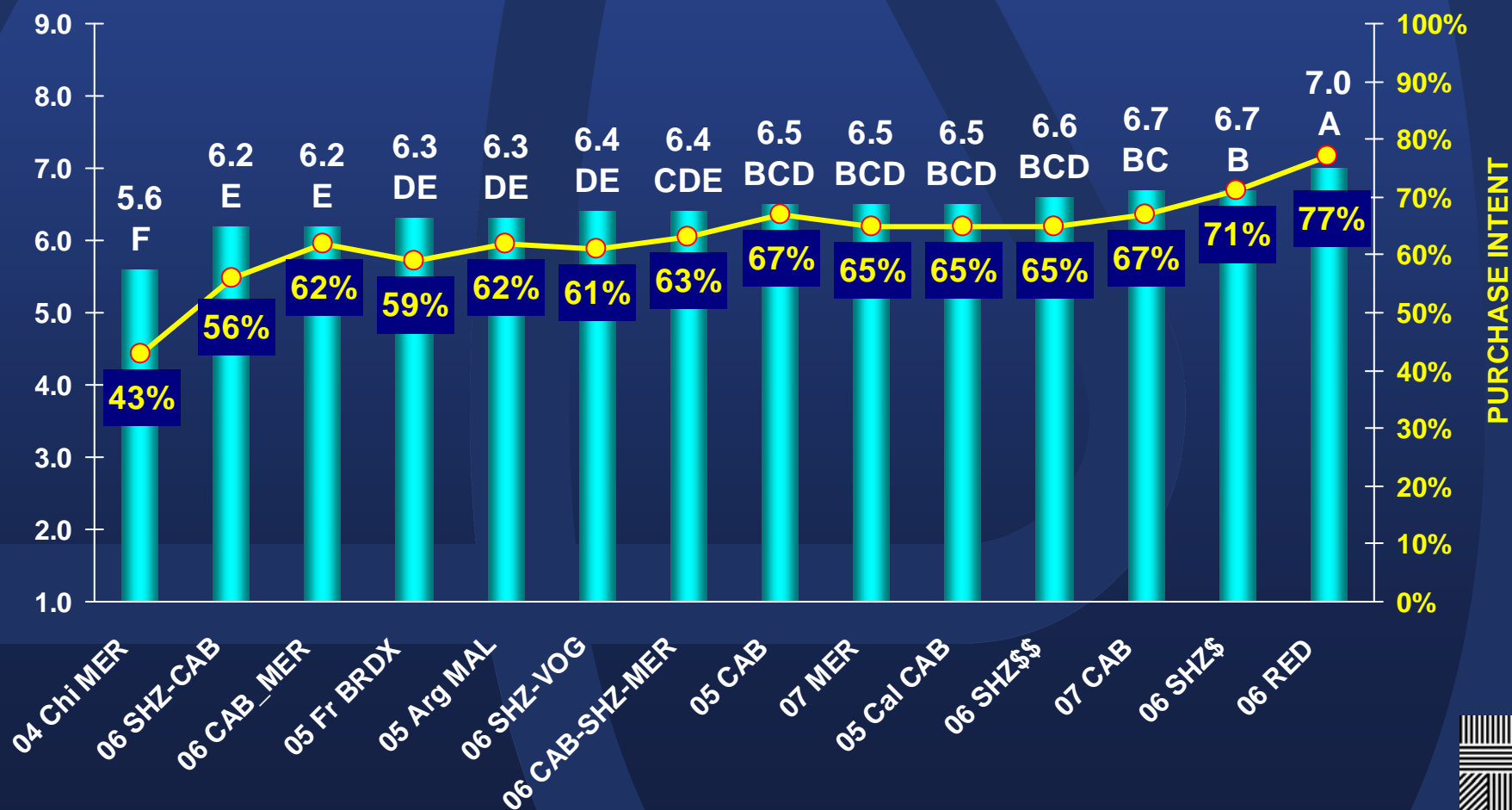
Product taste results

Overall opinion and purchase intent



2006 Red was significantly better liked than all other products with a very high purchase interest. Most other products were well liked with encouraging purchase interests but the wine from China was least liked on a blind basis with poor purchase interest.

OVERALL ACCEPTANCE - 9-POINT SCALE





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Product Taste Results

Overall Opinion – Demographic Correlations

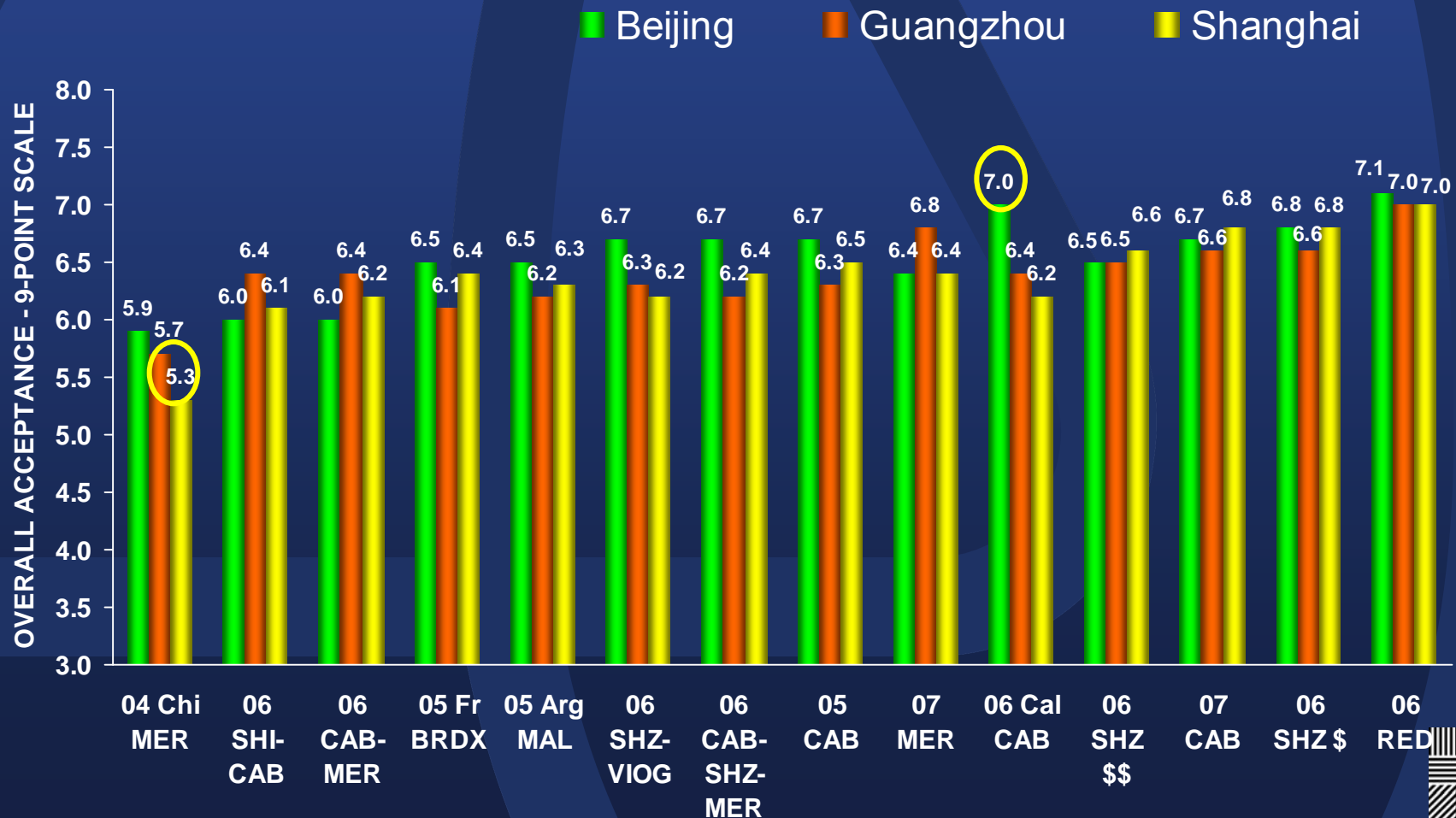
- All demographic groups had very high correlations with total population and each other for overall opinion ($r \geq 0.85$) indicating total population results can be used
- Guangzhou and Beijing consumers behaved somewhat differently towards select wines
- New wine drinkers were highly correlated with the more experienced drinkers

	Total pop	Benj	Guang	Shang	25-30	31-40	41-55	Male	Female	New User (n=65)	2yr+ User (n=245)
Total Pop (n=310)	1.00										
Beijing (n=104)	0.85	1.00									
Guangzhou (n=104)	0.87	0.54	1.00								
Shanghai (n=102)	0.95	0.71	0.80	1.00							
Age 25-30 (n=67)	0.91	0.75	0.81	0.85	1.00						
Age 31-40 (n=118)	0.97	0.81	0.82	0.95	0.81	1.00					
Age 41-55 (n=125)	0.96	0.84	0.83	0.89	0.79	0.93	1.00				
Male (n=183)	0.97	0.87	0.81	0.91	0.89	0.93	0.94	1.00			
Female (n=127)	0.95	0.74	0.87	0.92	0.85	0.94	0.90	0.85	1.00		
New User (n=65)	0.92	0.65	0.88	0.92	0.89	0.88	0.84	0.88	0.89	1.00	
2yr+ User (n=245)	0.99	0.89	0.83	0.93	0.88	0.97	0.97	0.97	0.93	0.86	1.00

Product results

Overall acceptance – markets

- Similar liking patterns were obtained among the three test markets. Beijing was most unique and rated the California Cabernet much higher and tended to rate many other products numerically higher than other markets.



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Conjoint SensMark™

Example scorecard

Conjoint using SensMark™

- Used to determine the important non-sensory drivers of purchase. Consumers are asked to select one of three possible selections relating to price, wine variety and country
- Consumers respond to 16 possible scenarios. Two versions of Conjoint are rotated to allow for 32 possible combinations

Please imagine you are in a local grocery store and you are able to select from various RED WINES. These RED WINES are described for you in terms of **WINE TYPE**, **COUNTRY OF ORIGIN** and **PRICE**. For each question, please select the ONE product you would be most likely to purchase.

Question 1 Choose One

Cabernet Sauvignon from France below 35 RMB @	Pinot Noir from Chile for 106-140 RMB @	Shiraz/Syrah from Italy for 86-105 RMB @
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Question 2 Choose One

Sangiovese from China for 35-65 RMB @	Cabernet Sauvignon from Australia over 140 RMB @	Merlot from California, USA for 66-85 RMB @
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Question 3 Choose One

Sangiovese from Italy below 35 RMB @	Pinot Noir from Australia for 35-65 RMB @	Shiraz/Syrah from Chile over 140 RMB @
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Question 4 Choose One

Sangiovese from California, USA for 86-105 RMB @	Pinot Noir from China for 66-85 RMB @	Merlot from France for 106-140 RMB @
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Question 5 Choose One

Shiraz/Syrah from California, USA for 106-140 RMB @	Cabernet Sauvignon from Italy for 35-65 RMB @	Merlot from Chile for 86-105 RMB @
--	--	---

Conjoint SensMark™ Results

Character importance



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- Price was most important to consumers purchasing decision followed by country of origin.

- Middle ranged prices, wines from France and Cabernet Sauvignon were most likely to be chosen.



Increasing Importance



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Preference segmentation

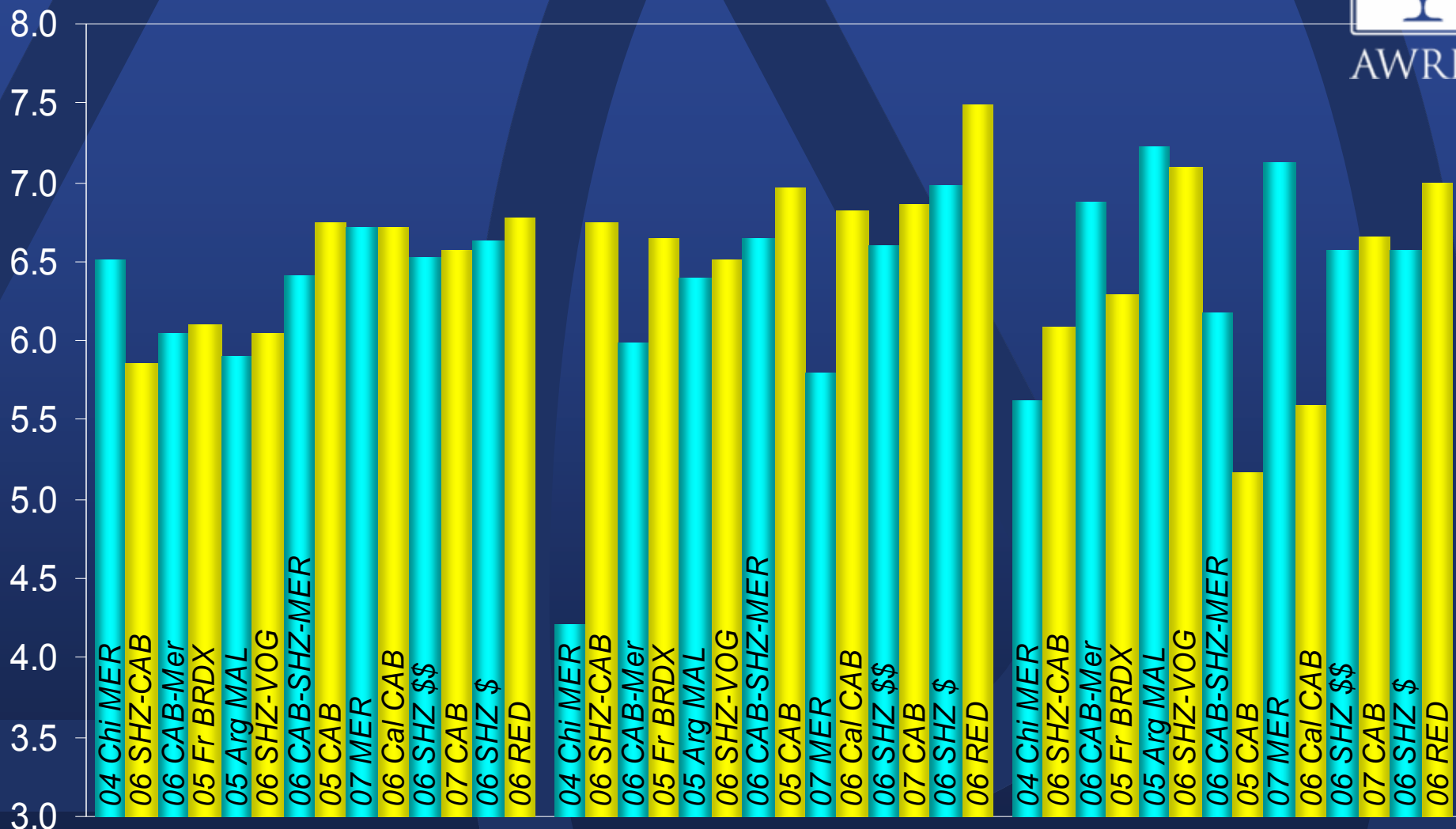
Consumers' liking is not uniform

Three distinct segments could be identified in the population: consumers who liked the same wines are grouped together.

Acceptance by consumer segment



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Cluster 1 (n=151)

Cluster 2 (n=97)

Cluster 3 (n=62)





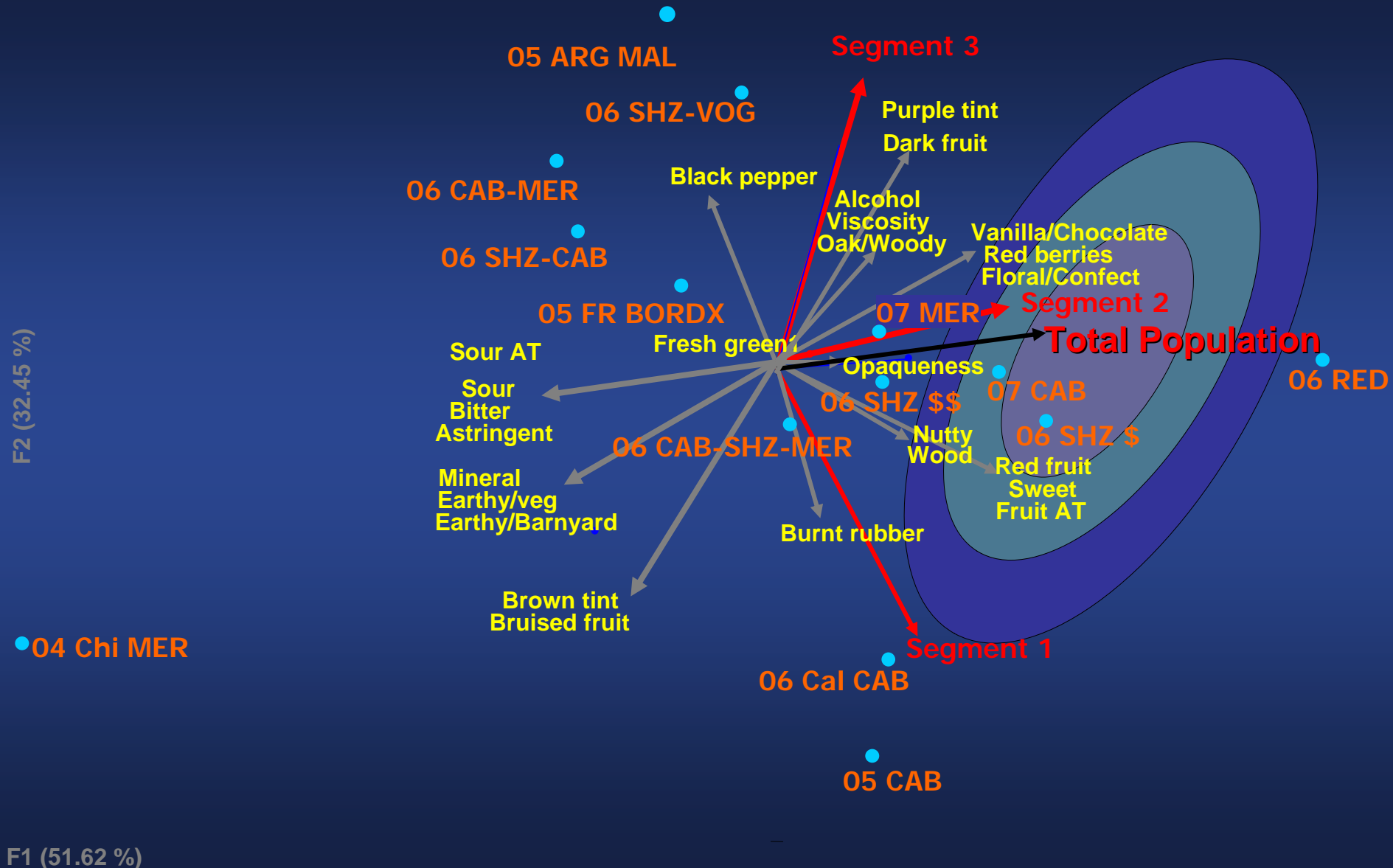
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Acceptance by consumer segment

- Segment 1 had a narrower range of scores. They liked 06 Red, 05 Cab, 07 Mer and 06 CAL Cab. They disliked 05 Argentinean Mal and 06 Shz-Vog
- Segment 2 really liked 06 Red, liked 05 Cab and 06 Shz \$. They strongly disliked the 04 Chinese Merlot and disliked 07 Mer.
- Segment 3 liked 05 Argentinean Malbec, 06 Shz-Vog and 07 Mer. They disliked 05 Cab and the Chinese Merlot.



Product dimensions landscape

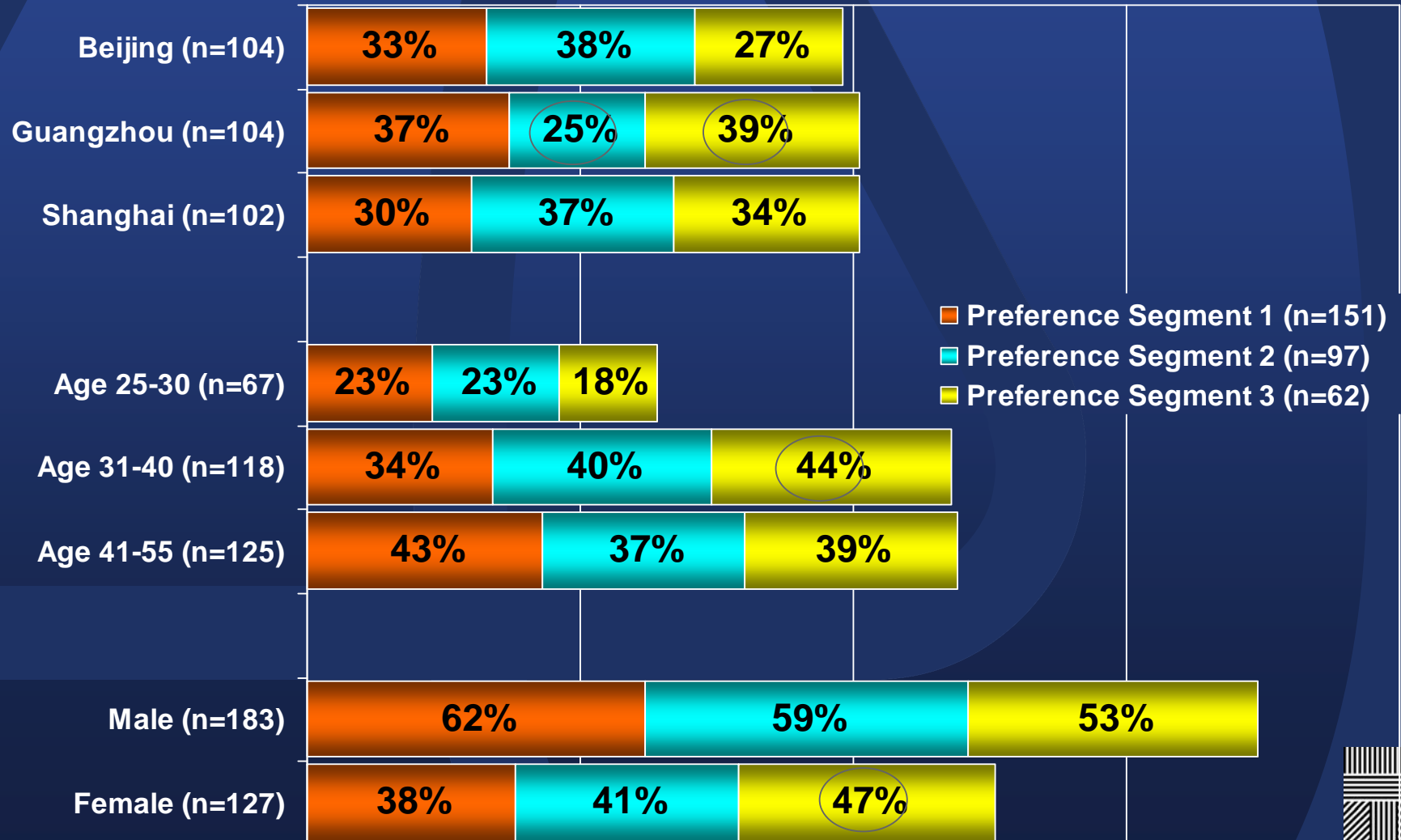


Demographic Profile



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- Segment 2 had less Guangzhou consumers and Segment 3 had slightly more females, ages 31-40 and Guangzhou consumers.



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Relating liking and expectations

SensMark™ Questions - What is the image associated with wines tasted?



3 Which **WINE TYPE** is most appropriate for the wine you just tasted? (**MARK ONE BOX ONLY**)

Cabernet Sauvignon

☐

Merlot

☐

Shiraz/ Syrah

☐

Chianti

☐

Bordeaux

☐

4 Which **BRAND** is most appropriate for the wine you just tasted? (**MARK ONE BOX ONLY**)

Gallo

☐

Yellow Tail

☐

Jacobs Creek

☐

Ruffino

☐

Mouton Cadet

☐

5 Which **COUNTRY of ORIGIN** is most appropriate for the wine you just tasted? (**MARK ONE BOX ONLY**)

Australia

☐

California, USA

☐

France

☐

Chile

☐

China

☐

Italy

☐

6 Which of the following **STYLES** in your opinion best describes the wine you just tasted? (**MARK ONE BOX ONLY**)

Bright & Fruity

☐

Oaky

☐

Rich & Bold

☐

Spicy & Interesting

☐

Thin & Light

☐

7 Which **PRICE** would you expect to pay for a bottle of the wine you just tasted? (**MARK ONE BOX ONLY**)

Below 35 RMB

☐

35-65 RMB

☐

66-85 RMB

☐

86-105 RMB

☐

106-140 RMB

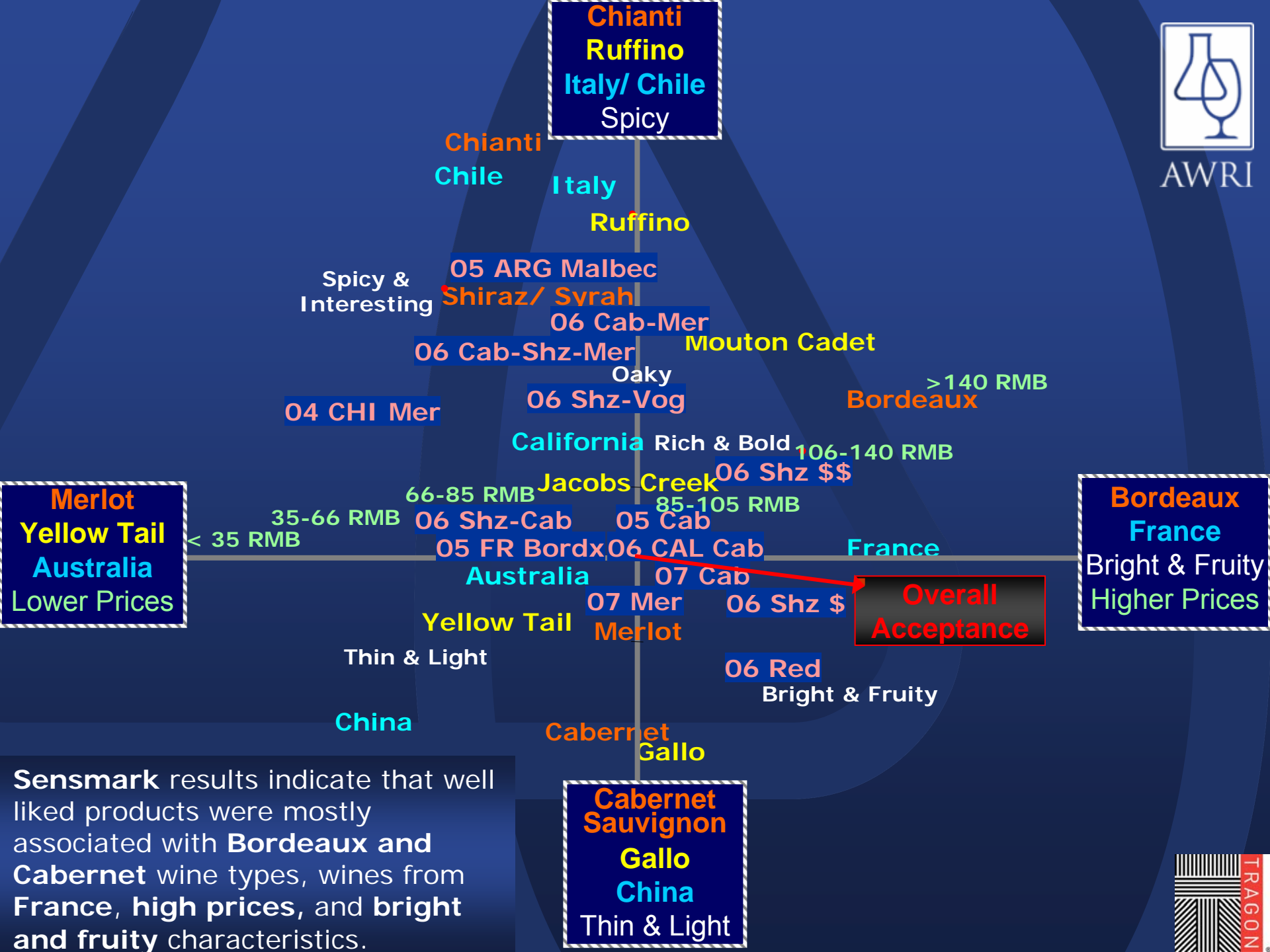
☐

Over 140 RMB

☐



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Product results

Sensmark by product

- For all segments, many of the same descriptors were associated with well liked products:
Bordeaux, France, Bright & Fruity, and higher prices
- Least liked products all tended to be associated with:
Shiraz/Syrah, Ruffino, Chile, Spicy & Interesting, and lower prices

Product results

Sensmark by product – preference segments

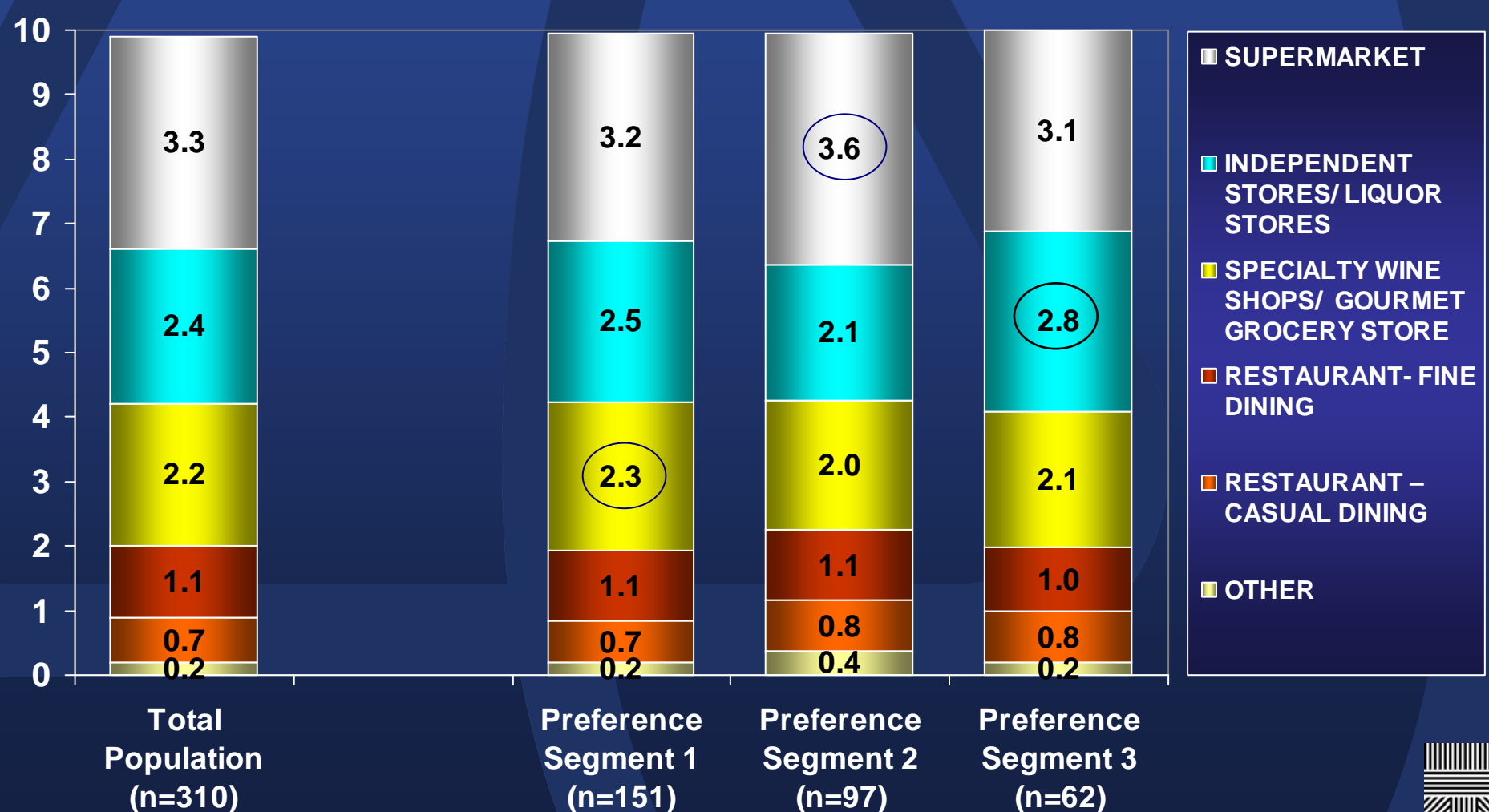
	Segment 1 Associated with...		Segment 2 Associated with...		Segment 3 Associated with...	
	Best liked wines	Least liked wines	Best liked wines	Least liked wines	Best liked wines	Least liked wines
Wine type	Bordeaux	Chianti Syrah/Shiraz	Cabernet Merlot	Chianti	Bordeaux Cabernet	Shiraz/Syrah Chianti
Brand	Mouton Cadet	Ruffino Yellow Tail	Jacobs Creek Gallo	Ruffino	No significant difference	
Country of Origin	France	Chile	France	Chile Italy	France	Chile China
Style	Bright & Fruity Rich & Bold	Spicy & Interesting	Bright & Fruity Rich & Bold	Spice & Interesting Thin & Light	Bright & Fruity Rich & Bold	Thin & Light Spicy & Interesting
Price	RMB 106-140 Over RMB 140	RMB 35-60 Below RMB 35	RMB 86-105	Below RMB 35	RMB 86-140 Over RMB 140	RMB 35-85 Below RMB 35

Preference Segments

Next 10 Purchases by BUSINESS TYPE



Segment 2 buys more wine from supermarkets while Segment 1 would buy from Specialty shops, and Segment 3 from liquor stores.

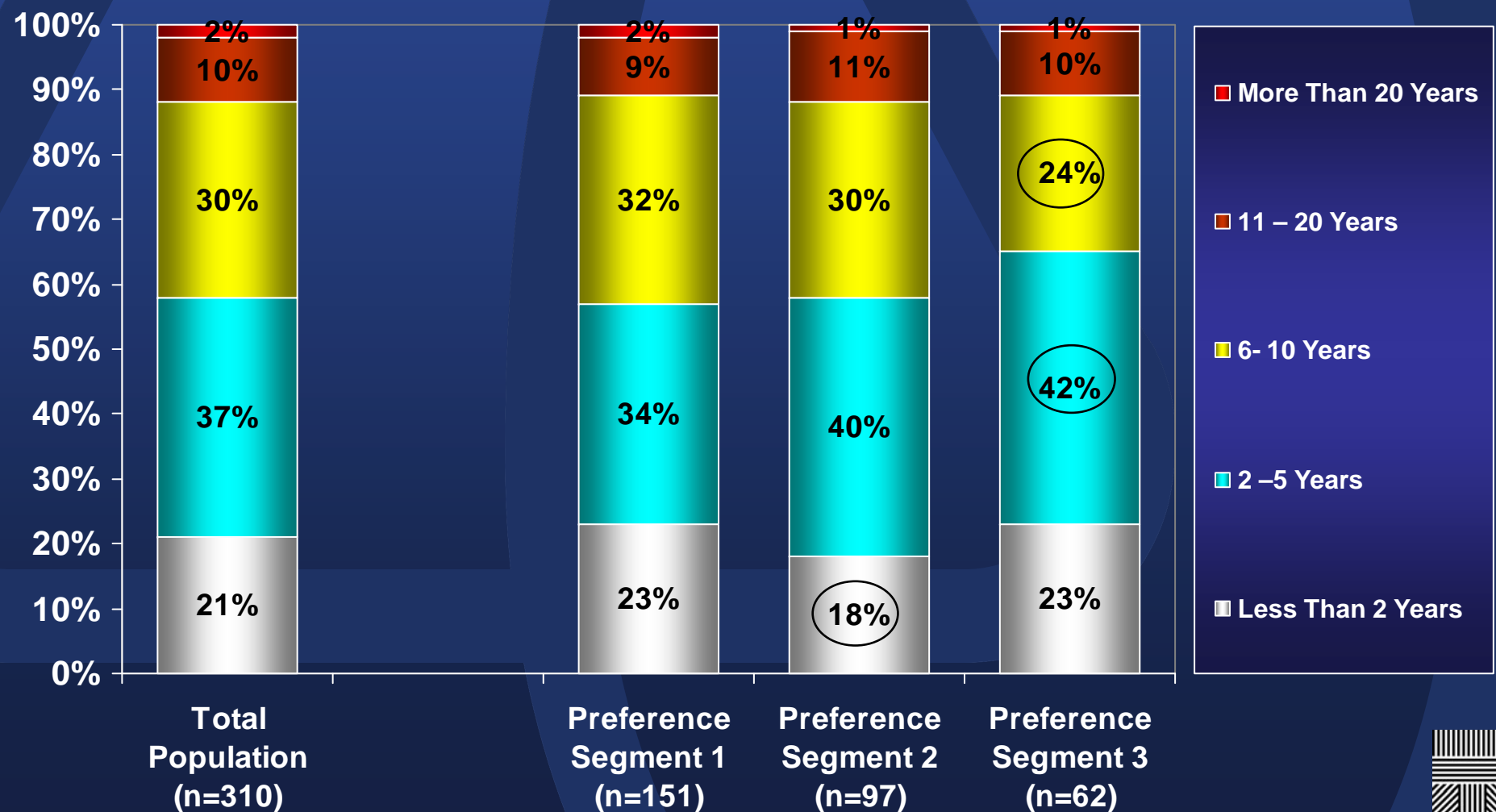


Preference segments

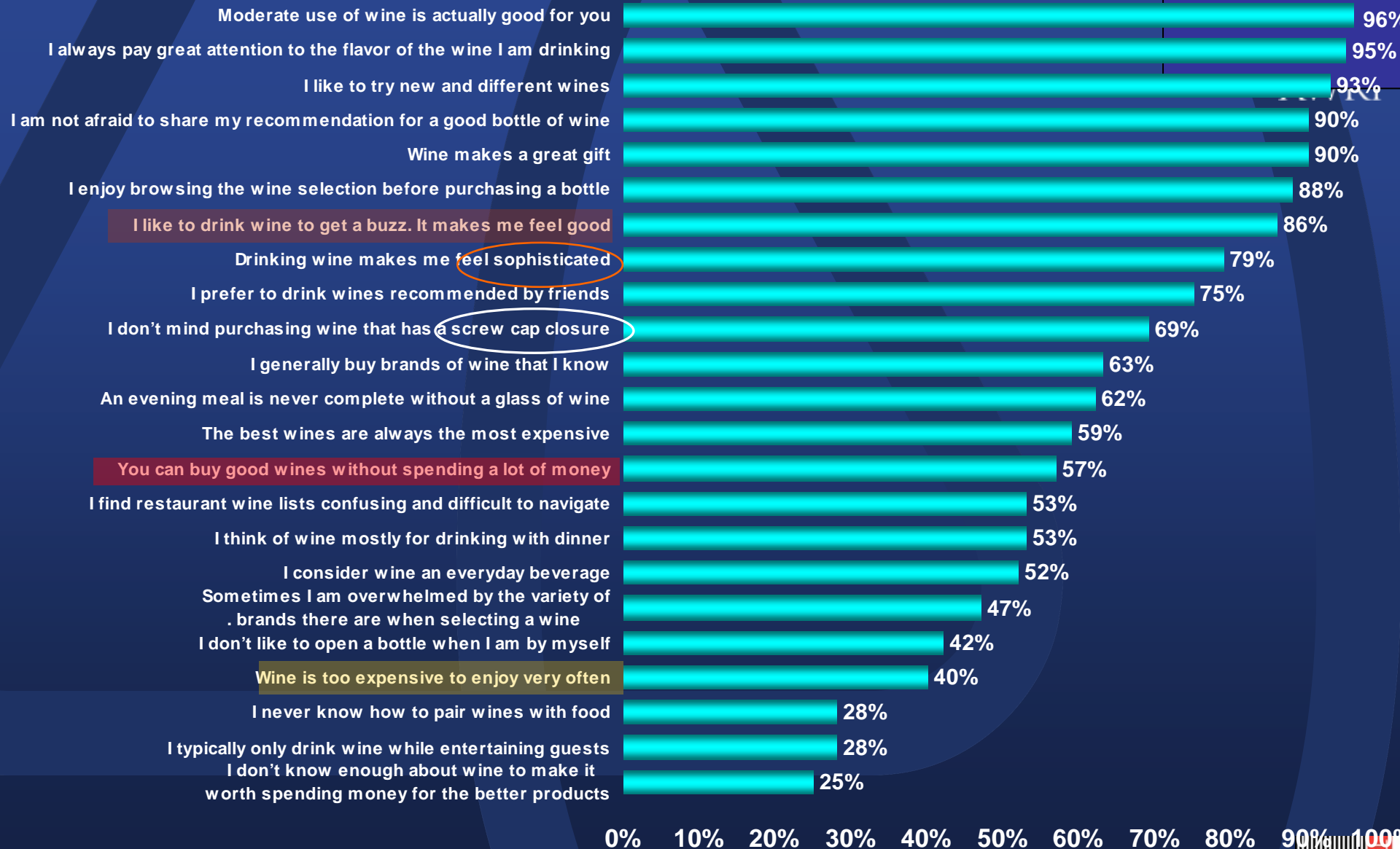
Red wine drinking behavior

How long have you been drinking red wine?

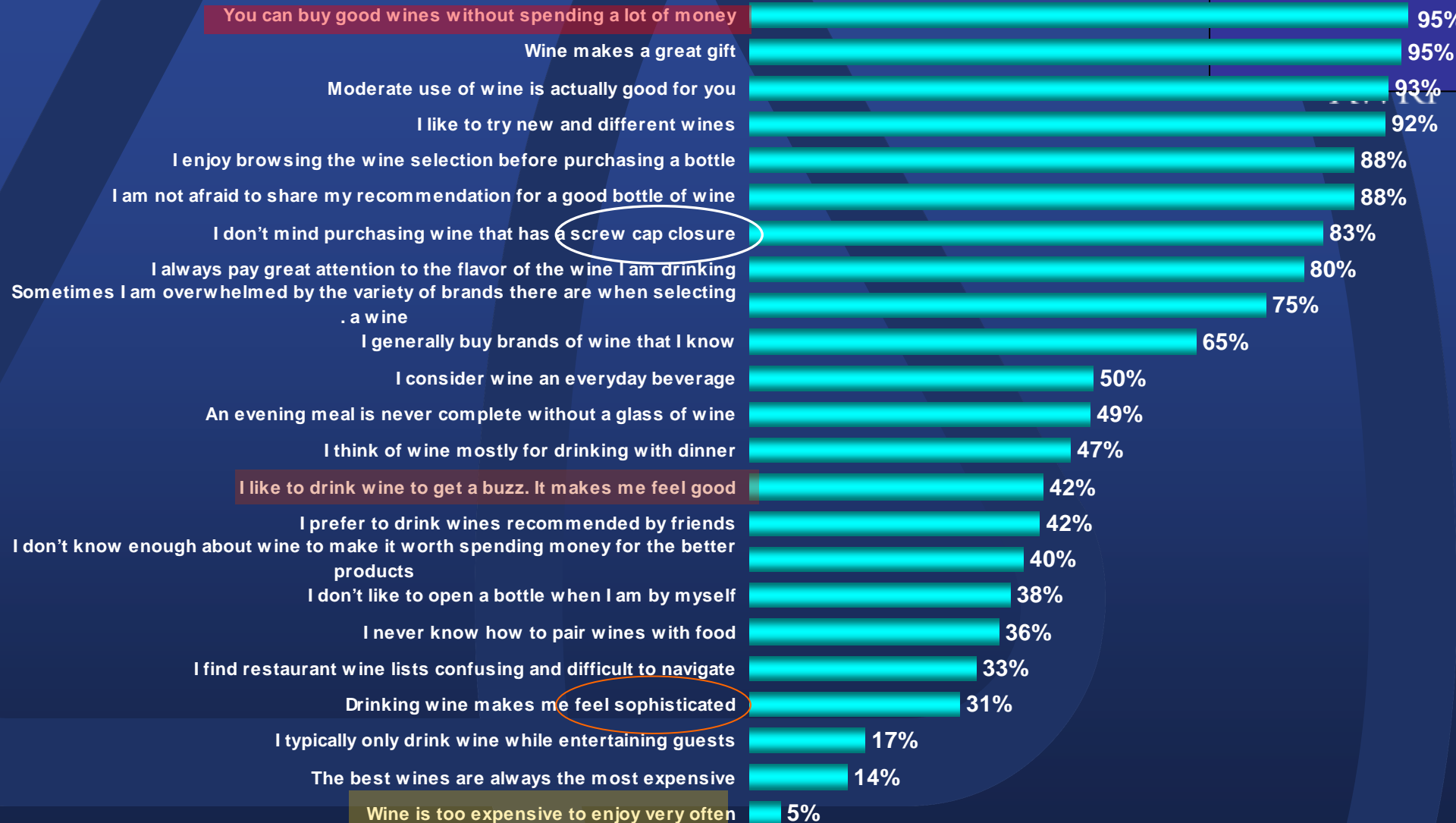
Segment 2 has less 'new-to-wine' consumers. Segment 3 is slightly higher in 2-5 years of wine consumption and lower in 6-10 years.



Agree statements



Agree statements Australia (CLT 216 consumers)



0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

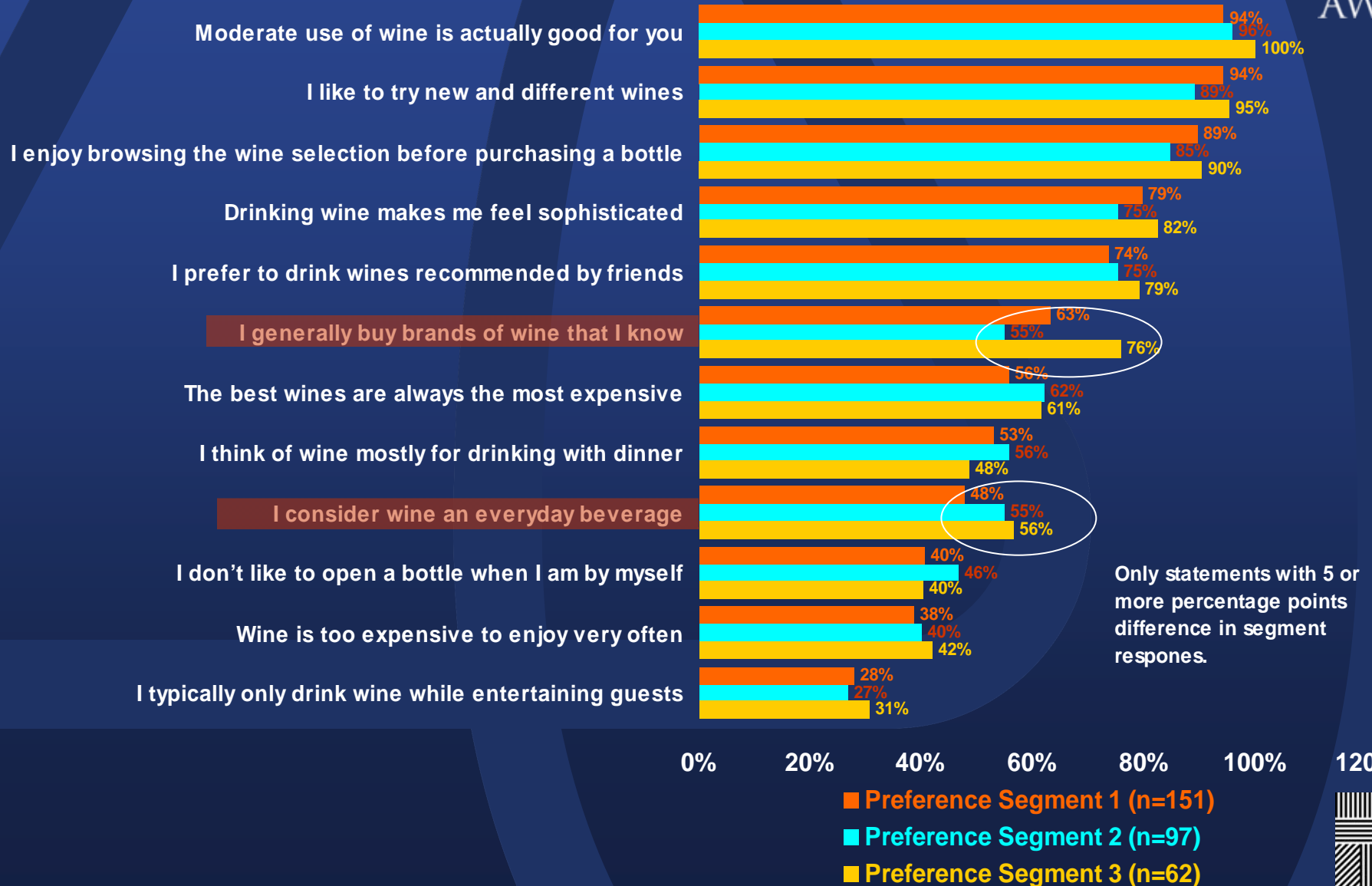


Preference segments

Agreement statements



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Frequencies - Clusters

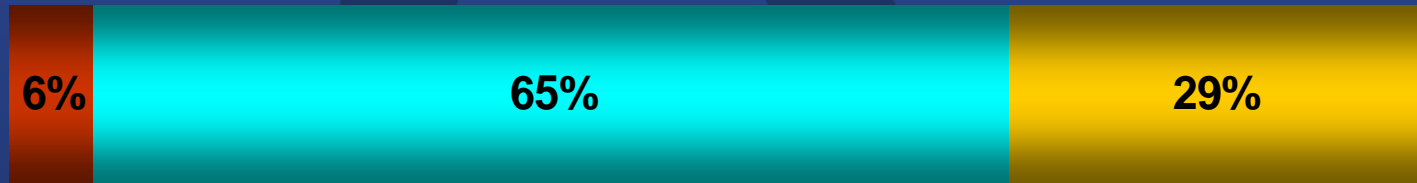
How much red wine do you drink now, compared with three years ago?

■ Drinking Less

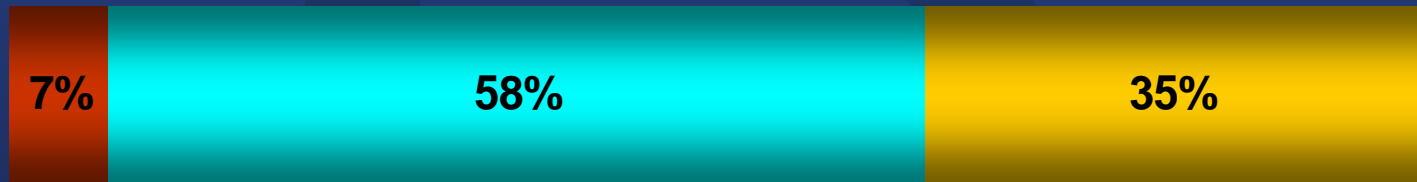
■ Drinking About The Same

■ Drinking More

Segment 3



Segment 2



Segment 1



0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

Reasons for increase in drinking red wine

I am drinking more red wine ...

Of the consumers who are drinking MORE wine, most are doing so because they feel the quality is higher, and because they are less inclined to drink beer. There were no differences between segments.



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Exit results

Total population

Exit Results

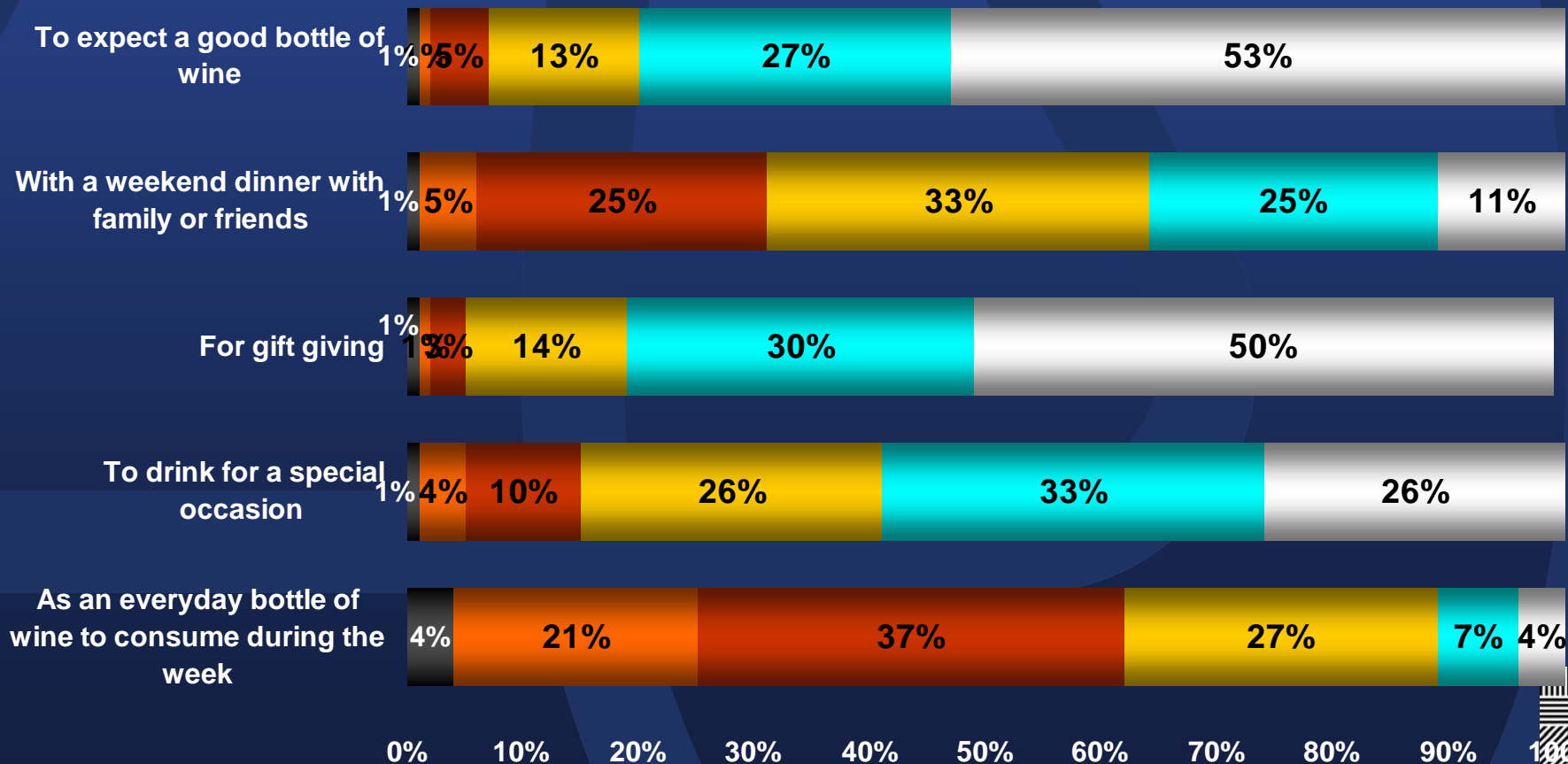
Frequencies

How much would you expect to spend on a RETAIL bottle of red wine to purchase for the following situations?



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The majority of consumers feel they need to spend over 100RMB for a “good” bottle of wine, for gift giving/ special occasion. In more casual situations the majority are OK with prices over 65RMB.



Exit Results

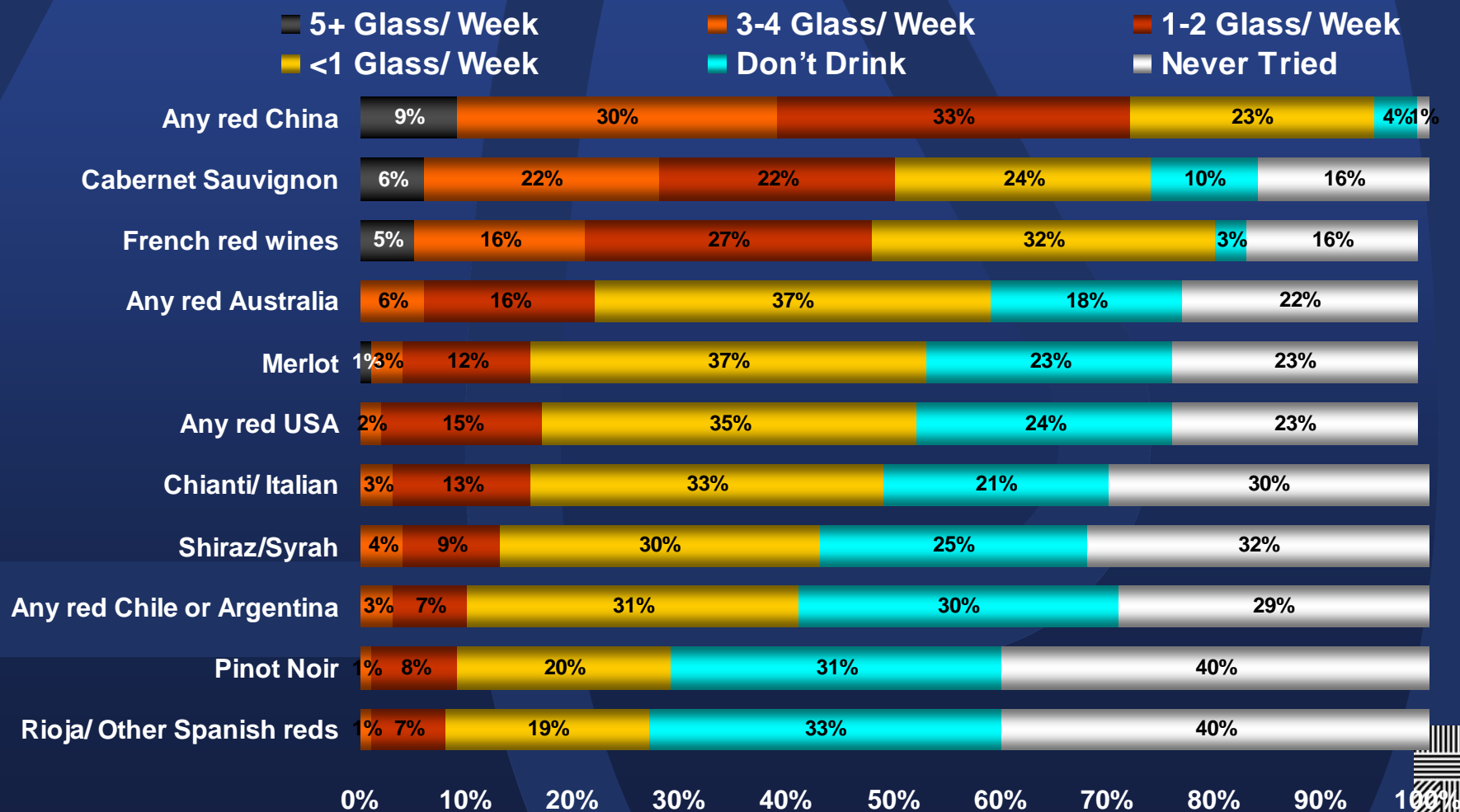
Frequency of Wine Consumption by Variety/Origin

Please indicate your typical weekly consumption for each of the following types of red wine:



AWRI

Wines from China are consumed most often, followed by Cabernet/wines from France. Spanish reds and Pinot Noir are least consumed and well known



Exit results

Importance to purchase decision

When making a decision about which red wine to purchase, how important are the following factors?



Wine origin is most important, followed by recommendations from friends and good wine ratings by critics. NOTE - No differences between segments.



0% 10% 20% 30% 40% 50% 60% 70% 80% 90%



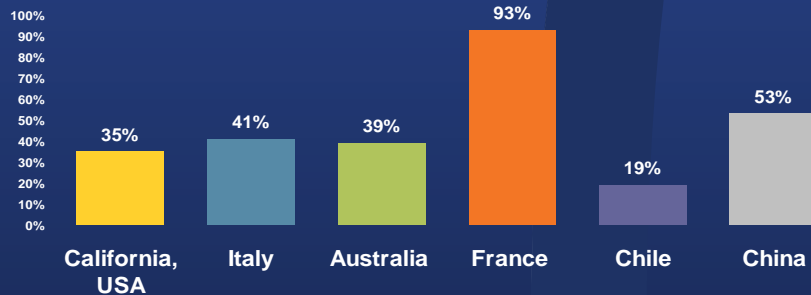
Exit Results

Thinking about red wines from California (USA), Italy, Australia, France, Chile and China, do you AGREE with each statement for red wines from each place?

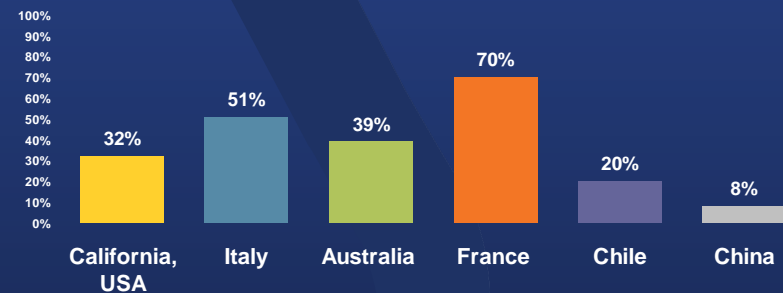


French wine rates highest for dependable, exciting, special treat, and great value. Wines from China are also considered great value. **Australian** wines were considered **great value** by only about a **quarter of consumers**, and **special treat** by **one in five**

Are Dependable



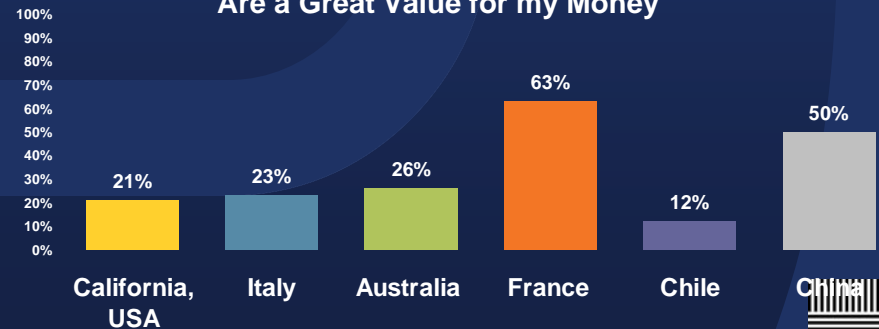
Are Exotic and Exciting



Are a Special Treat



Are a Great Value for my Money

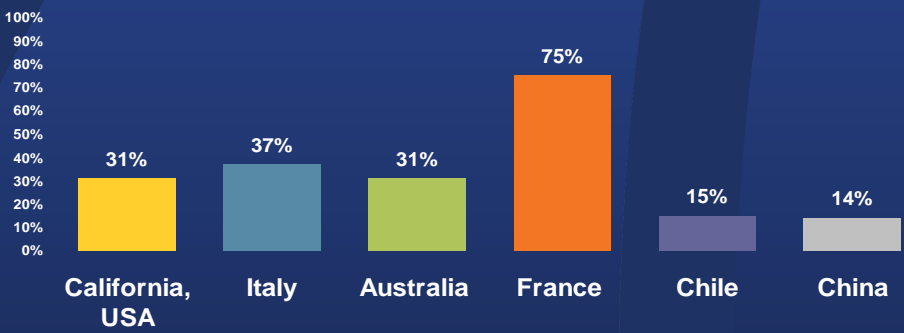




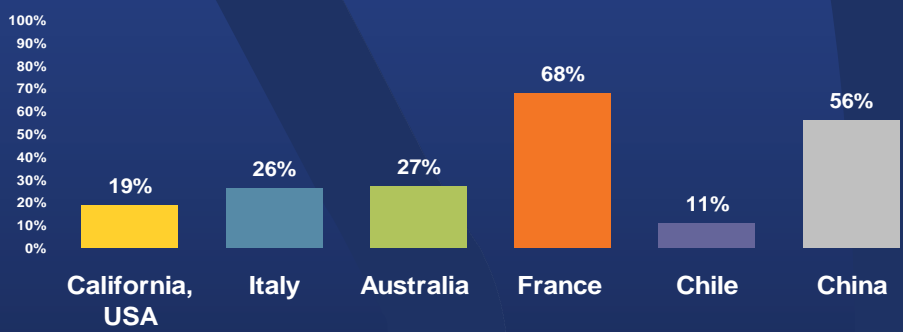
Exit results

French wine rates highest for all attributes polled, except that more consumers felt that wines from China are “easier to drink”, and this contrasts greatly to blind taste test ratings. Australian wines were considered trendy, familiar, easy to drink and “for me” by only about a quarter to a third of consumers, at parity with wines from Italy and California.

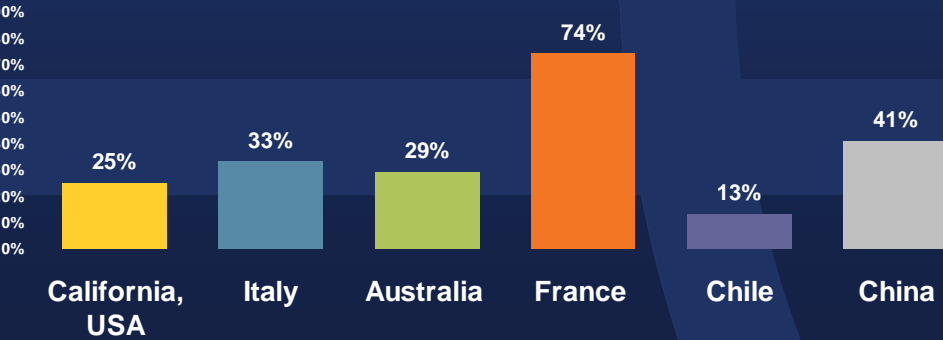
Are Trendy and Modern



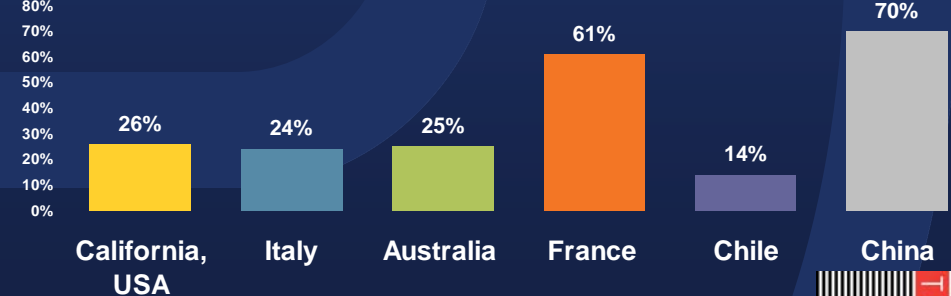
Are Familiar and Comforting



Are enjoyed by people like me



Are Easy to Drink

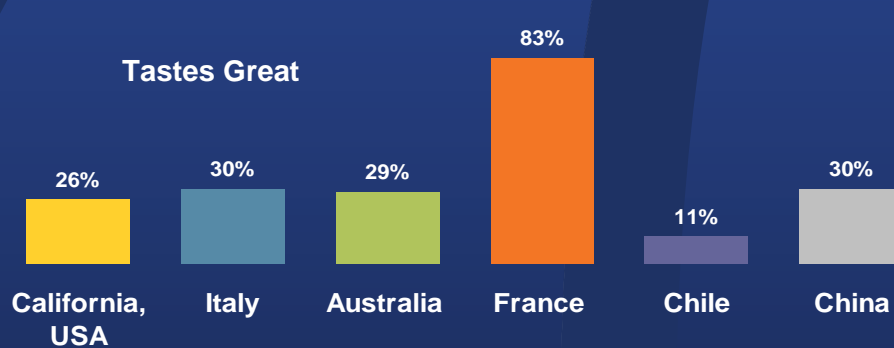




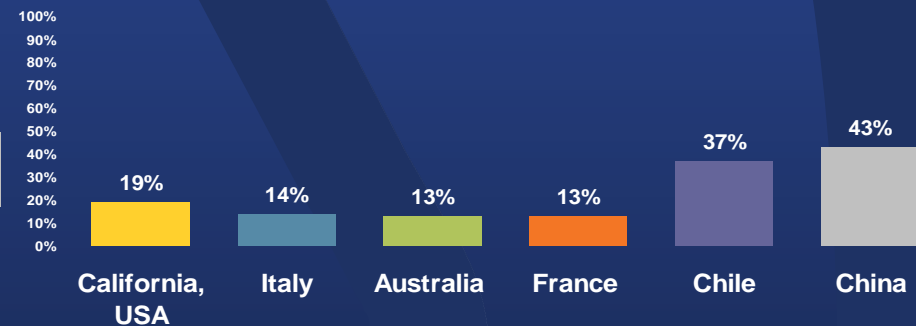
Exit results

French wine rates by far the highest for tasting great and are purchased when a guest is to be impressed. Wines from China are also considered inexpensive and not great quality by over two in five consumers, even more so than wines from Chile. Australian wines rated at parity to wines from Italy and California, although fewer consumers say they use Australian wines to impress their guests.

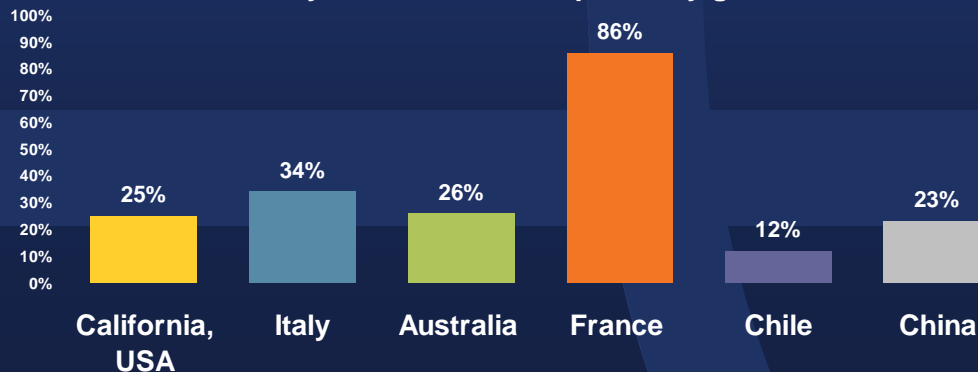
Tastes Great



Are Inexpensive and Not Great Quality



Are the Wines I Buy when I want to Impress my guests



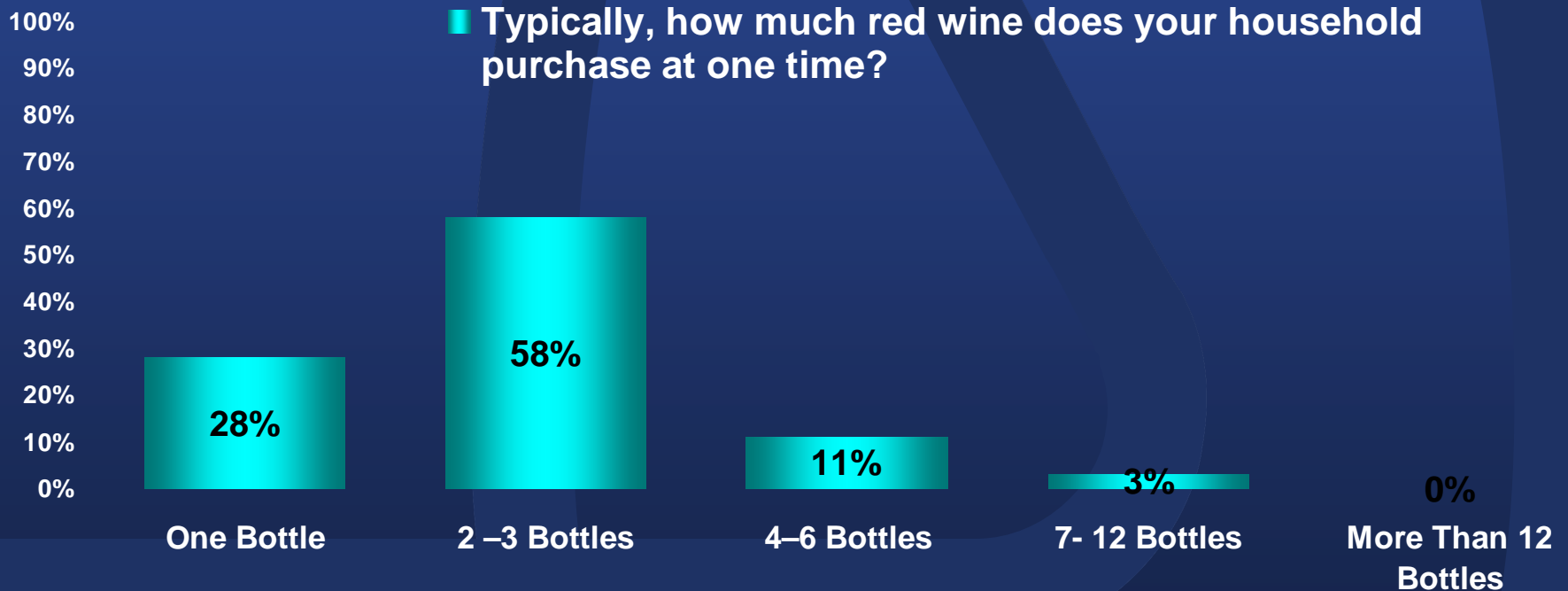


AAAD

Exit results

Bottles purchased at one time - total population

The vast majority of consumers purchase three or fewer bottles at one time. There were no appreciable differences between segments.



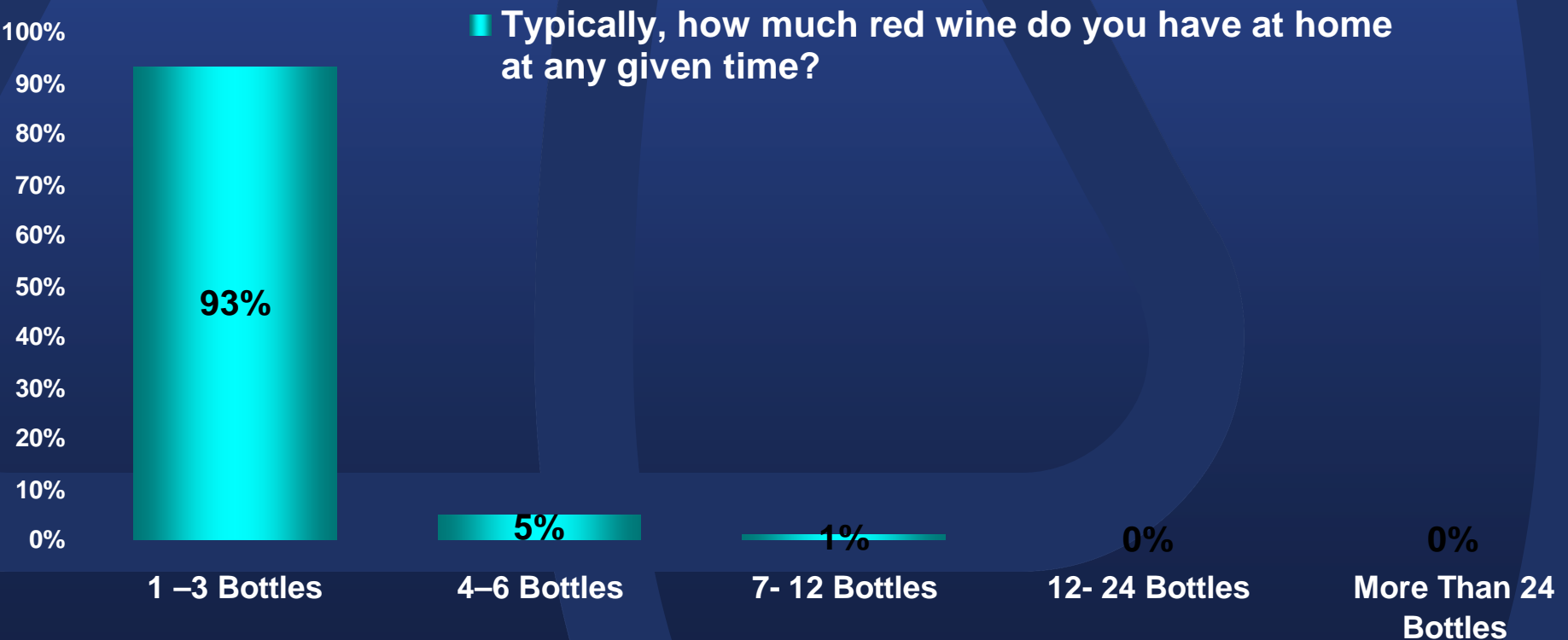
Exit results

Bottles at home - total population



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The majority of consumers hold only 1-3 bottles at home at any one time. No one stored more than 12 bottles. There were no differences between segments.



Management summary

Consumer taste preferences



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- Looking at all consumers (N=310), the best liked wines on a blind basis were all Australian: **The SEA Red (7.0) was the best liked, followed by SEA Shiraz \$ (6.7), SEA Cabernet (6.7) and SEA Shiraz \$\$ (6.7)**
- **Dragon Seal Merlot from China** was significantly disliked (5.6)
- Consumers in different regions of the country behaved similarly to total population, although some minor differences were seen in Beijing
- 70% of the consumers have been drinking wine from 2-10 years (40% 2-5 years)



Management summary

Key preference segment findings

Consumers were not homogenous in their preferences; cluster analysis revealed three distinct preference segments:



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•Segment 1 (50% of consumers)

- Liked 07 SEA Merlot, 06 SEA Red, 05 SA Cabernet and 06 California Cabernet
- Disliked 06 Argentinean Malbec, 06 SEA Shiraz-Cabernet and the French Bordeaux
- Liked **sweeter** wines and **less strong** aromas and flavours
- More favourable to **Chinese** brands
- Associated higher quality wines with **France, Bordeaux** and **higher prices**
- More consumers from **Beijing**
- Buy more wine from special shops
- Tend **not** to consider wine as a **everyday beverage**

Management Summary

Key Preference Segment Findings

- **Segment 2 (31% of consumers)**
 - Behaved similar to **total population**
 - Strongly liked 06 SEA Red. Liked 06 SEA Shiraz and 05 SA Cabernet.
 - Strongly disliked Dragon Seal. Disliked 07 SEA Merlot.
 - **Low acceptance** to earthy/barnyard, bruised fruit and mineral characteristics
 - Associated **Cabernet** and **Merlot** varieties, **Jacobs Creek** and **Gallo** brands to the most liked wines
 - Associated Ruffino/ **Italy** to **disliked** wines
 - less Guangzhou consumers and **less 'new-to-wine'** consumers
 - Most price sensitive preferring the **RMB 66-85** price point over higher priced wines

Management summary

Key preference segment findings



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- **Segment 3 (20% of consumers)**
 - Argentinean Malbec, 07 SEA Merlot and 06 SA Shiraz-Viognier were strongly liked
 - Disliked 05 SEA Cabernet 06 California Cabernet and Dragon Seal Merlot
 - Liked **darker colour** wines with **strong flavour** - jammy fruit and vanilla/ chocolate
 - Thought the best liked wines were **Bordeaux** or **Cabernet** and **not** from **China**
 - More consumers from **Guangzhou**, slightly more females
 - Slightly higher in 2-5 years of wine consumption and lower in 6-10 years
 - Tend to buy more wines at **liquor shops**, more **recommended**/ good reputation wines
 - more consumers drinking about the same as three years ago



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Management summary

'Brand Australia' imagery

- Conjoint SensMark™ (without wine) revealed that consumers are driven primarily by **Price** and **Country of Origin**. Wines from **France**, and variety **Cabernet Sauvignon** at **middle ranged prices** were most likely to be purchased
- Product SensMark (with wine) showed **well-liked** products **associated** with **Bordeaux** wine types, from **France**, **high prices**, and **Bright and Fruity** characters
- **Least liked** products all tended to be associated with Shiraz/Syrah, Ruffino, Chile, Spicy & Interesting, and lower prices
- **Australia** rates **lower** than **France** from an **imagery** perspective:
 - About **two to three times** as many Chinese consumers find wines from **France** more dependable, trendy, exotic and exciting yet familiar, great value, easy to drink and "for me", than wines from **Australia**
 - Roughly three to four times as many Chinese consumers consider wines from France a special treat and wines that "**taste great**". At the price points investigated this **completely contradicts the blind tasting results**
- **Australia** rated at **parity** with **Italy** and **California** across most imagery aspects
- Wines from **China** are also considered "**great value**". More consumers felt that wines from China are "**easier to drink**", and this also **contrasts greatly to blind taste test findings**.
- Exit findings also revealed the importance of recommendations from friends and good wine ratings by critics

The Australian Wine Research Institute



Australian consumer test

Identical protocol as used in the China test
Mostly the same wines tested as for China



Australian CLT



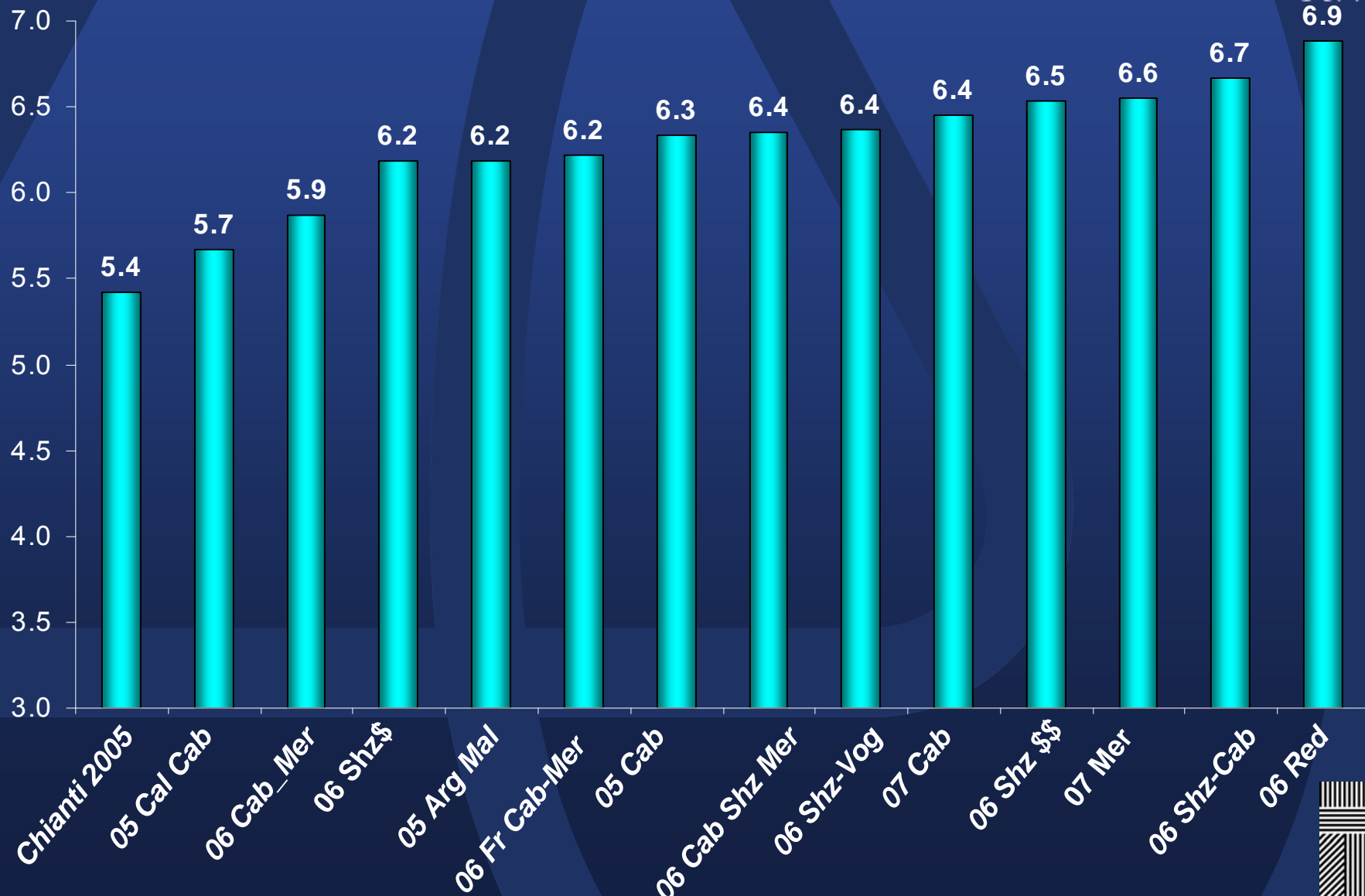
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- 216 consumers from Sydney and Melbourne
- Red wine drinkers: drink red wine at least once per week, buy bottled wine \$10-\$20 from time to time
- Age 20-65, split in three groups: 20-35, 36-50 and 51-65, equal number of each group
- 50% males and 50% females
- 20% drinking wine for less than two years
- Living in the city where the test was conducted
- Do not work for manufacturer or distributor of alcoholic beverages, marketing, marketing research, advertising
- Not participating in any other study concurrently or recently (last three months)
- For women: not pregnant

Australian consumers' overall acceptance



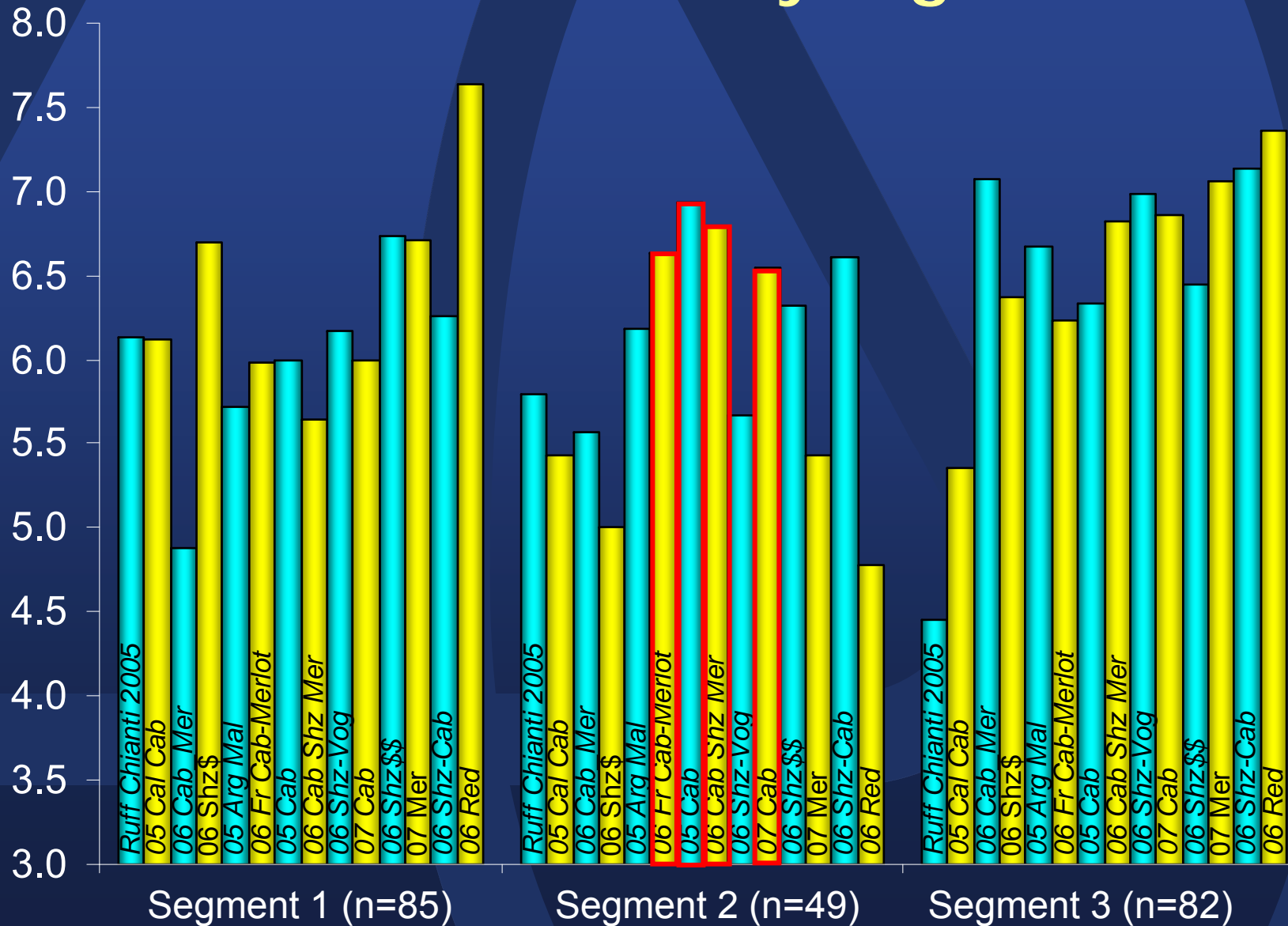
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Australian consumers by segment



Australian acceptance by consumer segment



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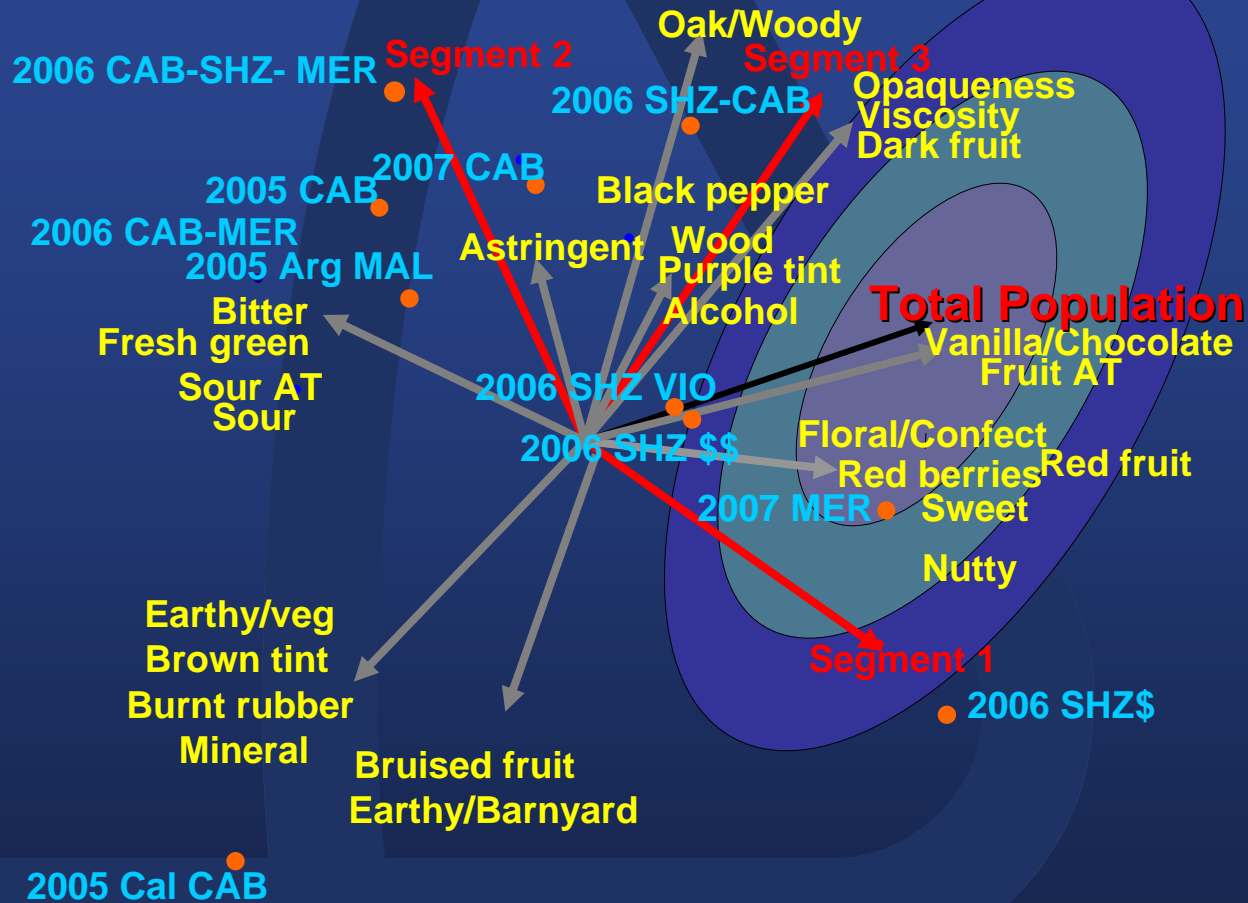
- Segment 1 really liked 06 Red. They also liked 07 Mer, 06 Shz\$\$ and 06 Shz\$. They disliked 06 Cab-Mer.
- Segment 2 liked 05 Cab and 06 Cab-Mer-Shz. They disliked 06 Red and 06 Shz\$
- Segment 3 liked 06 Red, 06 Shz-Cab, 07 Mer and 06 Cab-Mer. They disliked 05 Italian Chianti and the 05 California Cabernet.



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F2 (30.38 %)

Product dimensions landscape



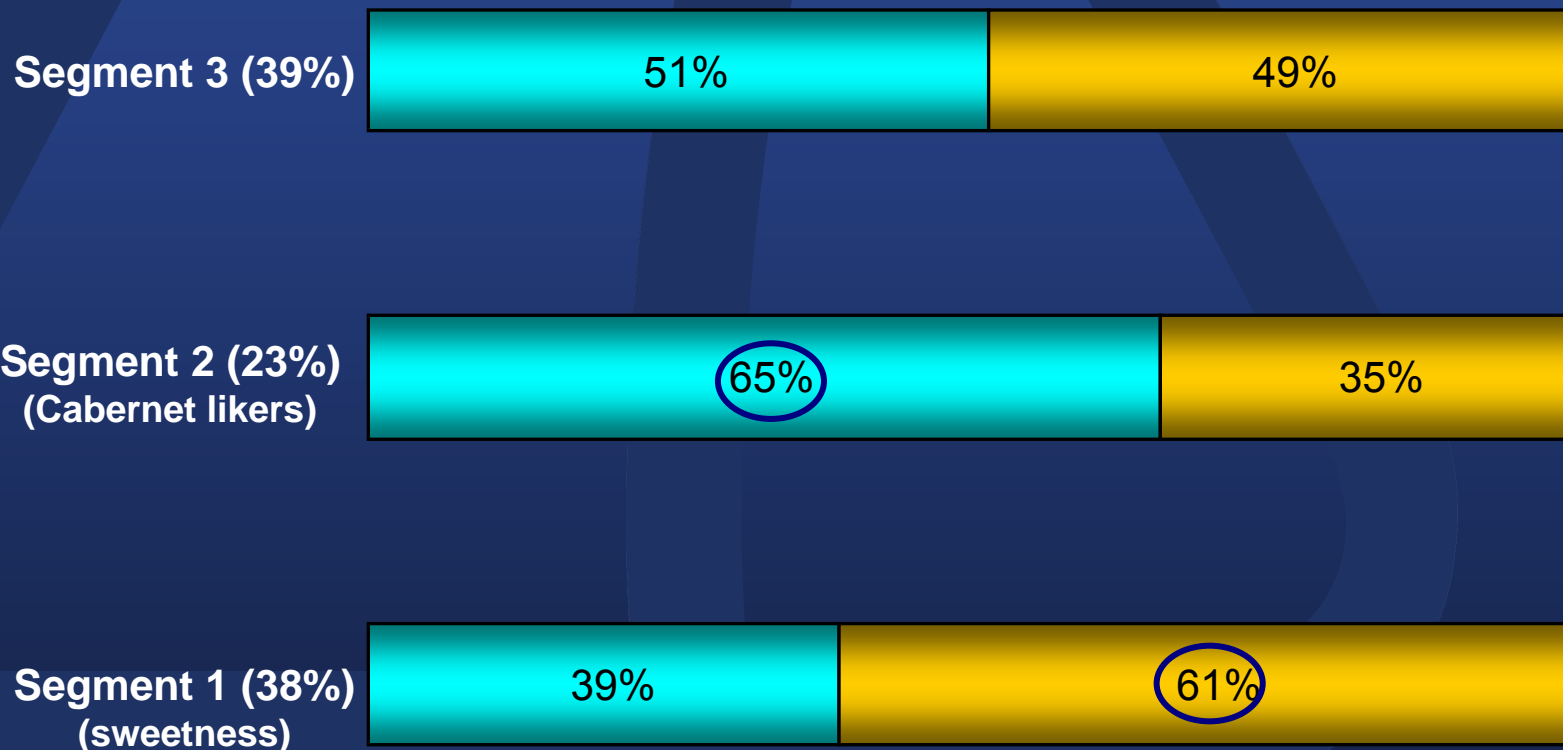
F1 (54.35 %)



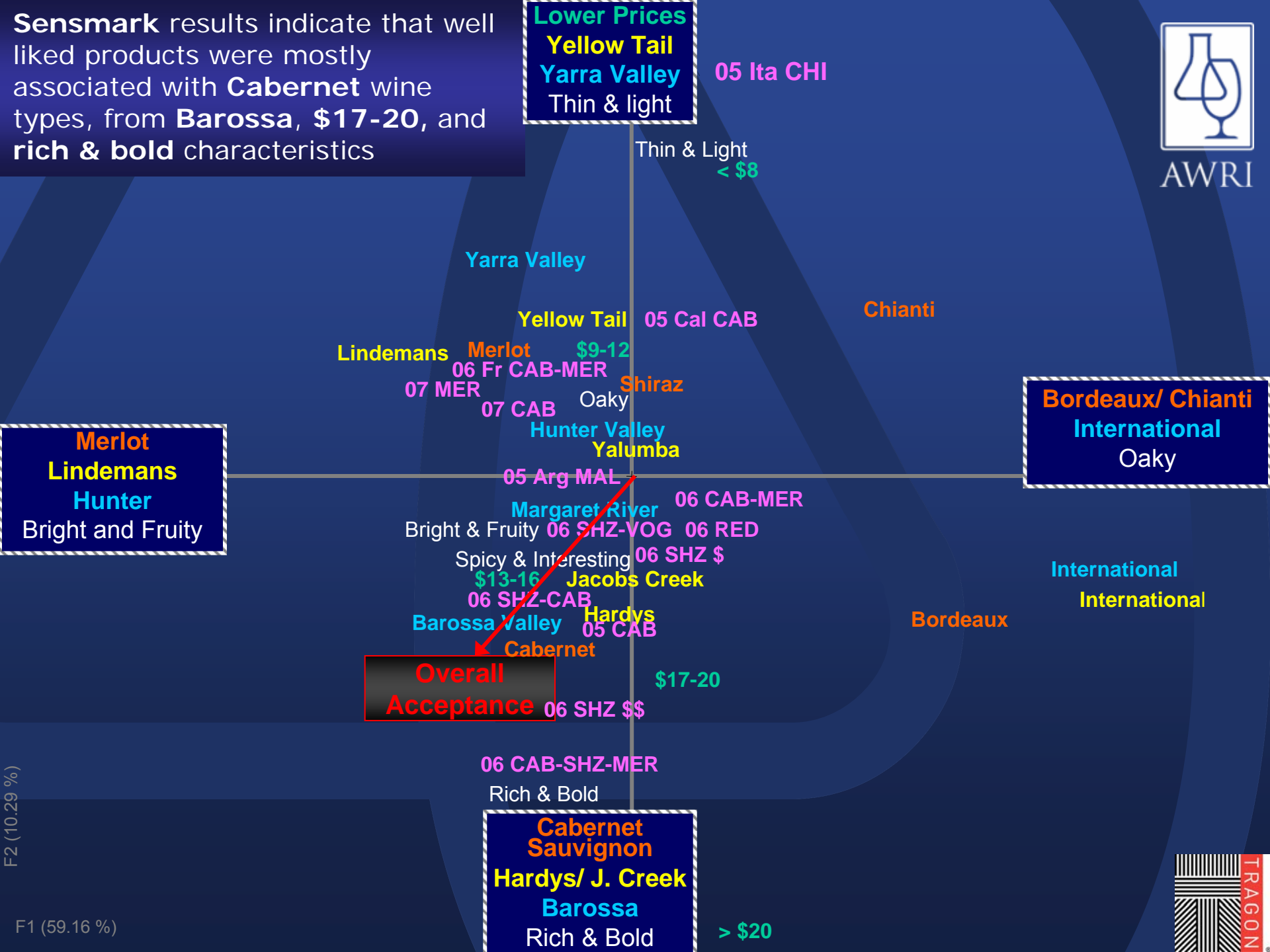
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Split of segments per city

■ Sydney (n=107)
■ Melbourne (n=109)



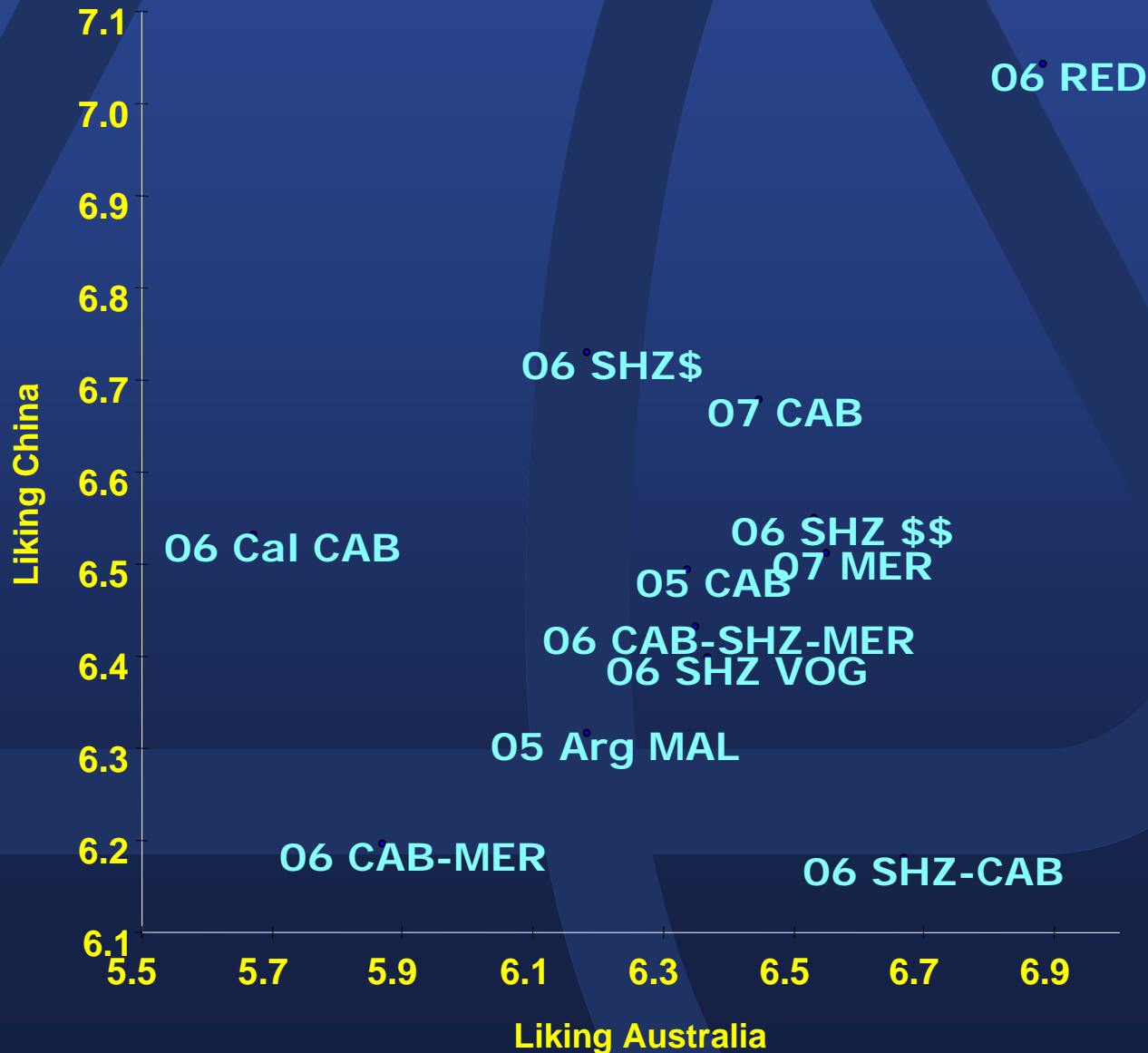
Sensmark results indicate that well liked products were mostly associated with **Cabernet** wine types, from **Barossa**, \$17-20, and **rich & bold** characteristics





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China vs Australia data





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Summary: Australian component

- Similar but distinct preference groups compared to China
 - 'green' Cabernet likers group identified
 - Two wines rated very differently between the two markets
- Indication of a Melbourne/Sydney preference difference
- International wines not liked and associated with thin and light/cheap
- Preferred wines associated with Cabernet, Barossa, Rich and Bold style

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