

# China Portraits

Report 2022



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# **How Portraits Work**

**China Portraits**  
2022

# What is Portraits and how do we develop it?

**Portraits is the name given to Wine Intelligence's consumer segmentation models, based on wine attitudes and behaviour. These are designed to provide wine businesses with a reference segmentation of wine drinkers in key global markets that can be applied to individual brands, regions, countries of origin, style categories and retailers**

Wine Intelligence uses factor and cluster analysis to group consumers into distinct segments based on their answers to questions about their wine-drinking behaviours and their attitudes towards wine. Once consumers have been identified as belonging to a specific segment, these segments are profiled based on a set of output variables which, in addition to the input variables, include demographic information and more detailed questions on wine-drinking behaviour.

The key variables used in the statistical cluster analysis are **recalled spend on wine, recalled wine drinking frequency** and **wine involvement**.

The individual segment descriptions are developed using both quantitative and qualitative inputs.

**Quantitative:** Analysis for China Portraits is based on a sample of Chinese urban, upper-middle class, semi-annual, imported wine drinkers collected in January, March and October 2021 via Wine Intelligence's Vinitrac® online survey.

**Qualitative:** Interviews were conducted across China in March 2022 (see Appendix for details of the qualitative research methodology).

**Disclaimer:** The brands listed in this report arise from the qualitative research conducted with respondents. Their position in the report is no direct reflection of any sales data or quantitative analysis, and are only those mentioned by respondents

# **Wine Intelligence Viewpoint**

**China Portraits**  
2022

# Wine Intelligence Viewpoint

**China's core wine drinking population remains stable, with consistent shifts towards less frequent consumption, and more interest in domestic wines**

The fundamental make-up of the Chinese wine drinking population has remained stable from 2019, meaning our segmentations and the proportion of the Chinese wine drinking population they make up are similar.

Despite this stability in population and segments, wine consumption is down. Part of this is due to falling consumption among those who aren't regular wine drinkers – our entire wine drinking population only accounts for 8% of urban Chinese.

Also, the upheaval of the past two years has caused some changes in overall wine drinking behaviour. Consumption is less frequent, beverage repertoires have narrowed, and people are buying more domestic wine.

However, confidence is up among the wine drinking population, alongside willingness to explore within the category.

## Opportunities

- Increasing interest and confidence in the category across segments
- Greater willingness to explore among Mainstream Casuals
- Relative youth of engaged segments
- Spend on wine is higher

## Threats

- Wine drinking frequency is down
- Growing volumes of domestic wine a threat to foreign brands

# Wine drinker segmentation: 2019 vs 2021

## Key differences within segments from 2019 to 2022

- **Engaged Explorers** are a slightly smaller group than in 2019 and are younger. This suggests wine drinking culture in China is led by younger consumers, likely to be well travelled and having lived or studied abroad before bringing wine habits back to China. However, this segment's alcoholic beverage repertoire and frequency has decreased, suggesting the pandemic has impacted their consumption rates.
- **Mainstream Casuals** have seen their wine behaviours influenced by the pandemic. Although they still have a preference for mainstream wines and brands they are familiar with, they have become more open to exploration, with confidence growing alongside this. There are also more female wine drinkers in this segment and they are younger than in 2019. However, they are still ultimately wine drinkers who enjoy wine for what it is. They are still not concerned about impressing others or actively seeking out more detailed knowledge.
- **Status Seekers** have remained similar in behaviours, drinking wine in social or business occasions, often to show off. A higher proportion come from Hangzhou and Shenzhen, driven by the vibrant tech and start-up scene in those areas.
- **Social Newbies** have aged as a group, with the segment likely made up of the same people as in 2019 and have seen their incomes increase as times go by. However, still at the early stages of their professional life, they are still price conscious. The pandemic appears to have increased interest in wine as something for more than social occasions, with Social Newbies drinking wine more frequently.
- **Frugal Occasionals** remain low spending, older, drinking wine socially or in business occasions.
- **Health Sippers** are also still older, infrequent drinkers.

Source1: Wine Intelligence, Vinitrac®, China Mar '18, Jul '18, Oct '18, Jan '19 & Mar '19, (n=9,000) Chinese urban upper-middle class semi-annual imported wine drinkers

Source2: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers

# **Market Context**

**China Portraits**

2022



# Wine market attractiveness

## Classification 2022

### Mature

Markets in which wine appears to have reached its potential, with stable or declining volumes

### Established

Markets with strong historical growth that is tailing off

### Growth

Markets in which wine is a mainstream product and / or experiencing growth

### Emerging

Markets in which wine is experiencing growth and shows potential from a relatively low base

### New Emerging

Markets in which wine is still a relatively new and unknown beverage, but showing potential

|      |                        |
|------|------------------------|
| 1    | United States          |
| 2    | South Korea            |
| 3    | United Kingdom         |
| 4    | Ireland                |
| 5    | Germany                |
| 6    | Norway                 |
| 7    | Canada                 |
| 8    | Sweden                 |
| 9    | Denmark                |
| 10   | Switzerland            |
| 11   | Singapore              |
| 12   | Poland                 |
| 13   | Netherlands            |
| 14   | Brazil                 |
| 15   | Romania                |
| 16   | France                 |
| ▶ 17 | <b>China</b>           |
| 18   | Australia              |
| 19   | Finland                |
| 20   | Belgium and Luxembourg |
| 21   | Japan                  |
| 22   | Russia                 |
| 23   | New Zealand            |
| 24   | Austria                |
| 25   | Spain                  |
| 26   | Italy                  |
| 27   | Colombia               |
| 28   | Czech Republic         |
| 29   | Hungary                |
| 30   | Hong Kong              |

|    |                      |
|----|----------------------|
| 31 | Mexico               |
| 32 | Portugal             |
| 33 | Slovakia             |
| 34 | Turkey               |
| 35 | Argentina            |
| 36 | Taiwan               |
| 37 | Chile                |
| 38 | Slovenia             |
| 39 | Nigeria              |
| 40 | Malaysia             |
| 41 | Peru                 |
| 42 | Greece               |
| 43 | Philippines          |
| 44 | United Arab Emirates |
| 45 | Thailand             |
| 46 | Vietnam              |
| 47 | India                |
| 48 | Indonesia            |
| 49 | South Africa         |
| 50 | Angola               |

# Market overview (From Wine Intelligence Compass wine market attractiveness model 2021)

China is the 17<sup>th</sup> most attractive market for wine

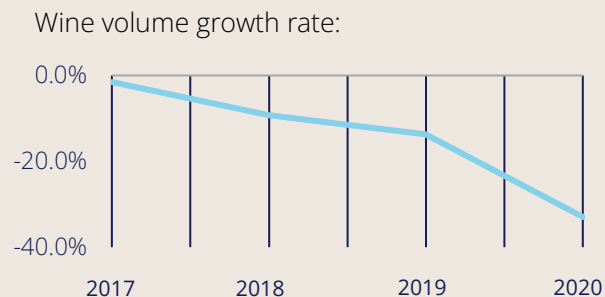
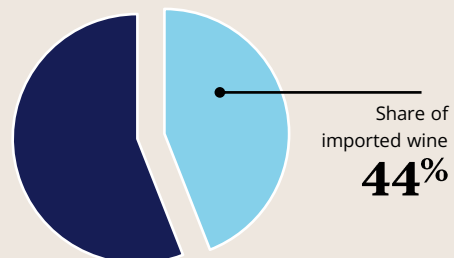
## Wine market summary

Total wine consumption  
**82,026**

Long-term trend  
**-15.24**  
CAGR 2016-20

Imported wine consumption  
**36,126**  
'000 9 L cases of still light wine

Consumption / Capita  
**0.5**  
Litres per year per adult aged 21+ (all wine)



Source: IWSR

## Economic summary

Adult population  
**1184.4 m**

GDP / Capita  
**8,405**  
US Dollars

GDP Long-term trend  
**5.76%**  
av. growth 2016-20

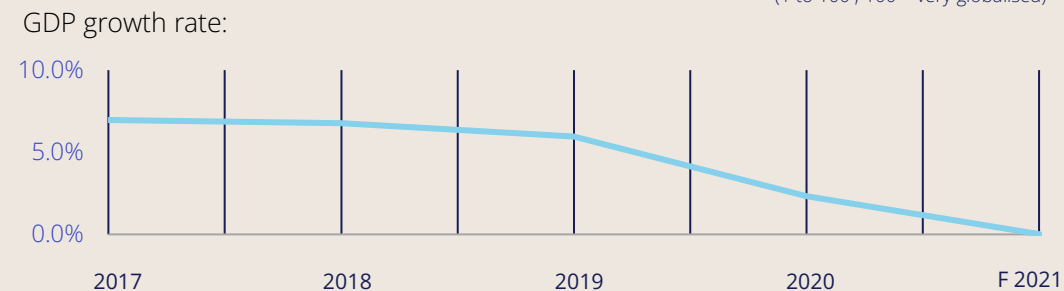
Predicted 2021 GDP:  
**8.44%**

Unemployment rate  
**3.8%**

GNI / Capita  
**10,610**  
US Dollars

Corruption index:  
**42**  
(0 to 100 ; 100 = no corruption)

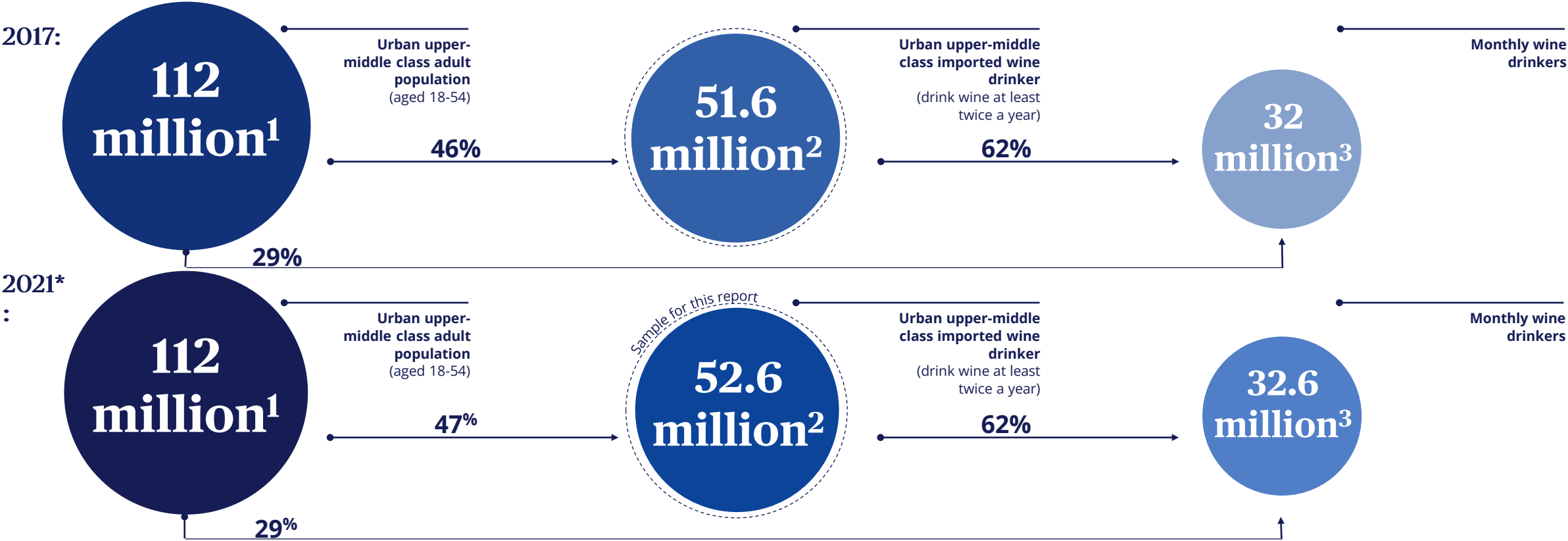
Globalization index:  
**64**  
(1 to 100 ; 100 = very globalised)



Source: IWSR

# Wine drinkers in the Chinese wine market

The regular wine drinking population in China has remained relatively stable since 2017



\*Calibration data based on 2019 data

1: United Nations Statistics Division, Population by age, sex and urban / rural residence (Census 2010)

2: Wine Intelligence China calibration online survey, July 2019, n=1000 Chinese urban residents aged 18-54 in selected cities and Wine Intelligence estimation for other cities. Wine=still light wine (red, white, rosé)

3: Wine Intelligence, Vinitrac®, 2017, 2021(n>=1,000), Chinese urban upper-middle class semi-annual imported wine drinkers

# **Wine drinker segments**

## **China Portraits**

### 2022

# Wine drinker segmentation

## % share of Chinese regular wine drinkers 2021

### HEALTH SIPPERS

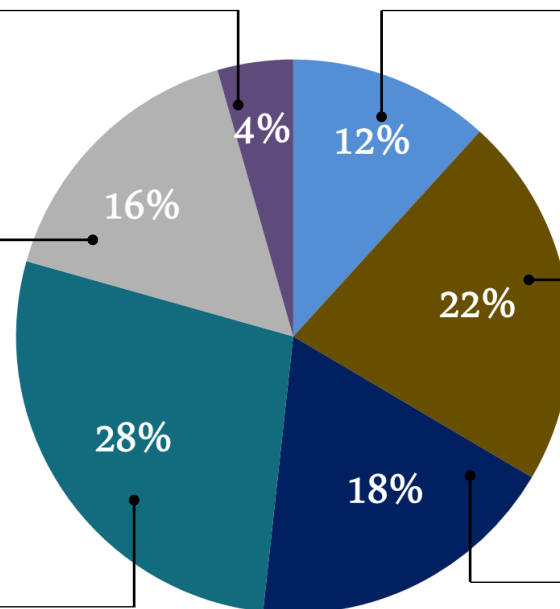
The oldest segment. They account for the smallest proportions of volume and value in the Chinese wine market. Drink mainly red wine to keep healthy.

### FRUGAL OCCASIONALS

The second youngest segment. Likely to be at the start of their career. This is one of the least involved groups, accounting for a relatively small proportion of volume and value in the Chinese wine market. They are generally not keen on alcohol and drink wine mainly for social and business events.

### SOCIAL NEWBIES

A younger group of consumers who are just starting to drink. Wine is one of the many options they drink at social events and is often chosen by their friends or family members. Likely to be in the early stages of their career, they are quite cost-conscious when buying wine themselves and tend to look for promotions.



### ENGAGED EXPLORERS

The youngest group, with high incomes and a slight female bias. They are the most frequent drinkers and the highest spenders. Either because wine is part of their job or because they have a genuine interest in wine, they are the most involved, knowledgeable and confident segment. They have the broadest repertoire of varietal, origin and brand consumption.

### MAINSTREAM CASUALS

Middle-aged to older drinkers, they who have developed an interest in wine. They are frequent drinkers but only mid-range spenders. They mostly buy mainstream wines but will occasionally try something new. They are relatively involved in and knowledgeable about the wine category, with a confidence level to match.

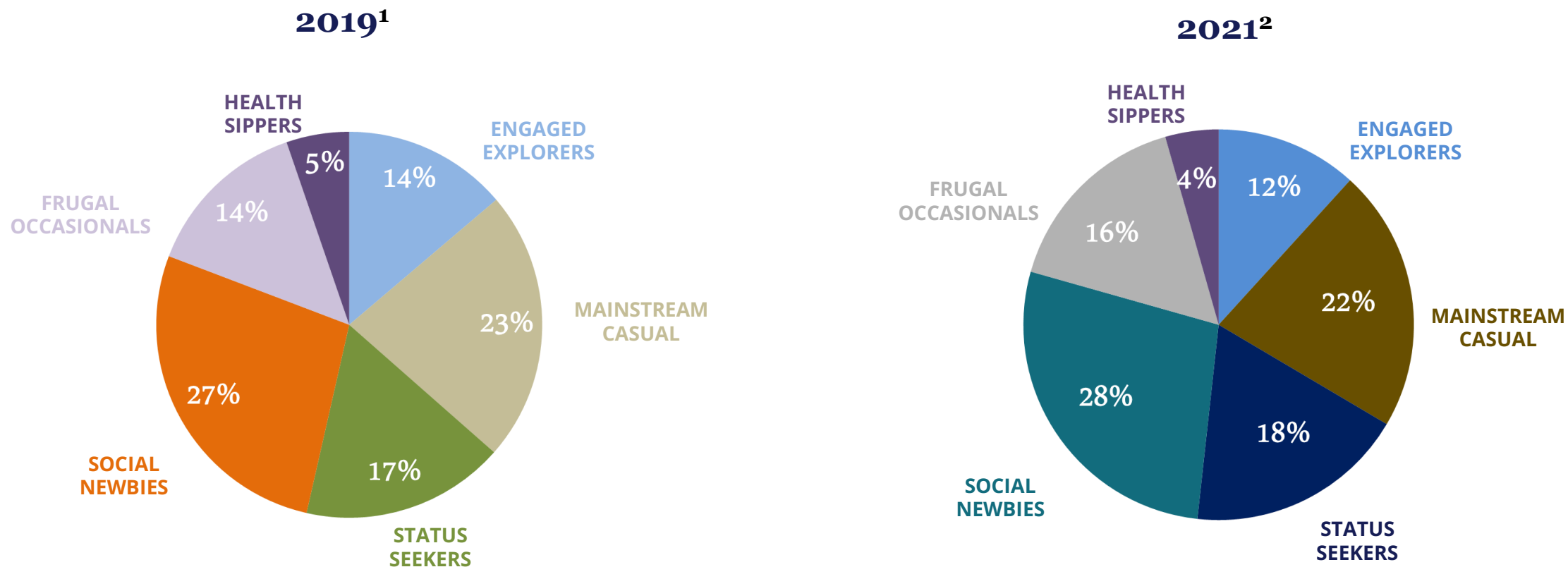
### STATUS SEEKERS

Younger, more affluent drinkers. They are the second highest spending segment. Wine is something they drink at social or business event to show-off their social status. They are knowledgeable and highly confident about wine. They enjoy collecting lesser-known brands and origins.

Source: Wine Intelligence, Vinitrac®, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers  
Wine Intelligence, consumer interviews

# Wine drinker segmentation: 2019 vs 2021

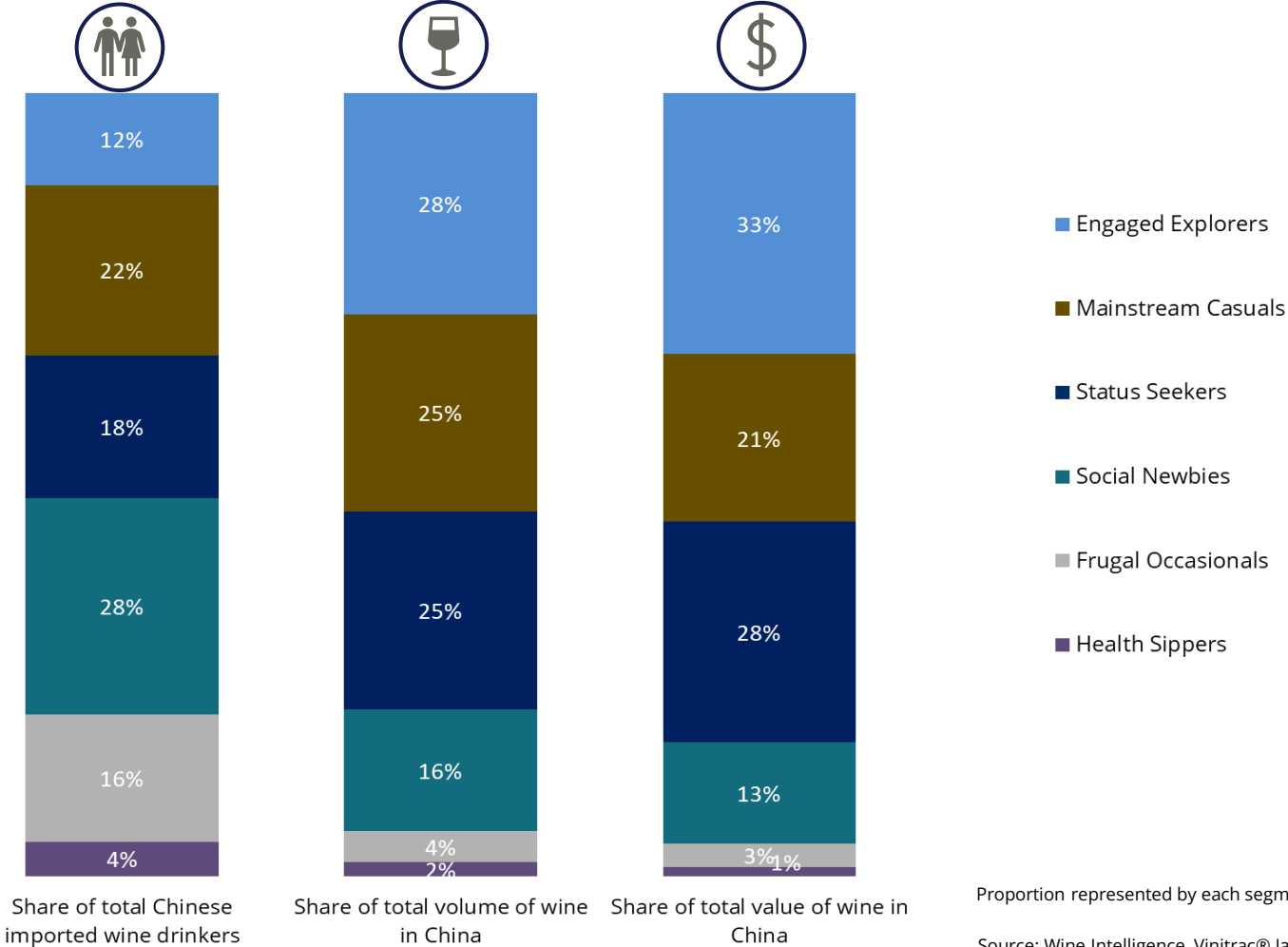
% share of Chinese regular wine drinkers remained relatively stable since 2019



Source1: Wine Intelligence, Vinitrac®, China Mar '18, Jul '18, Oct '18, Jan '19 & Mar '19, (n=9,000) Chinese urban upper-middle class semi-annual imported wine drinkers  
Source2: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers

# China Portraits market sizing

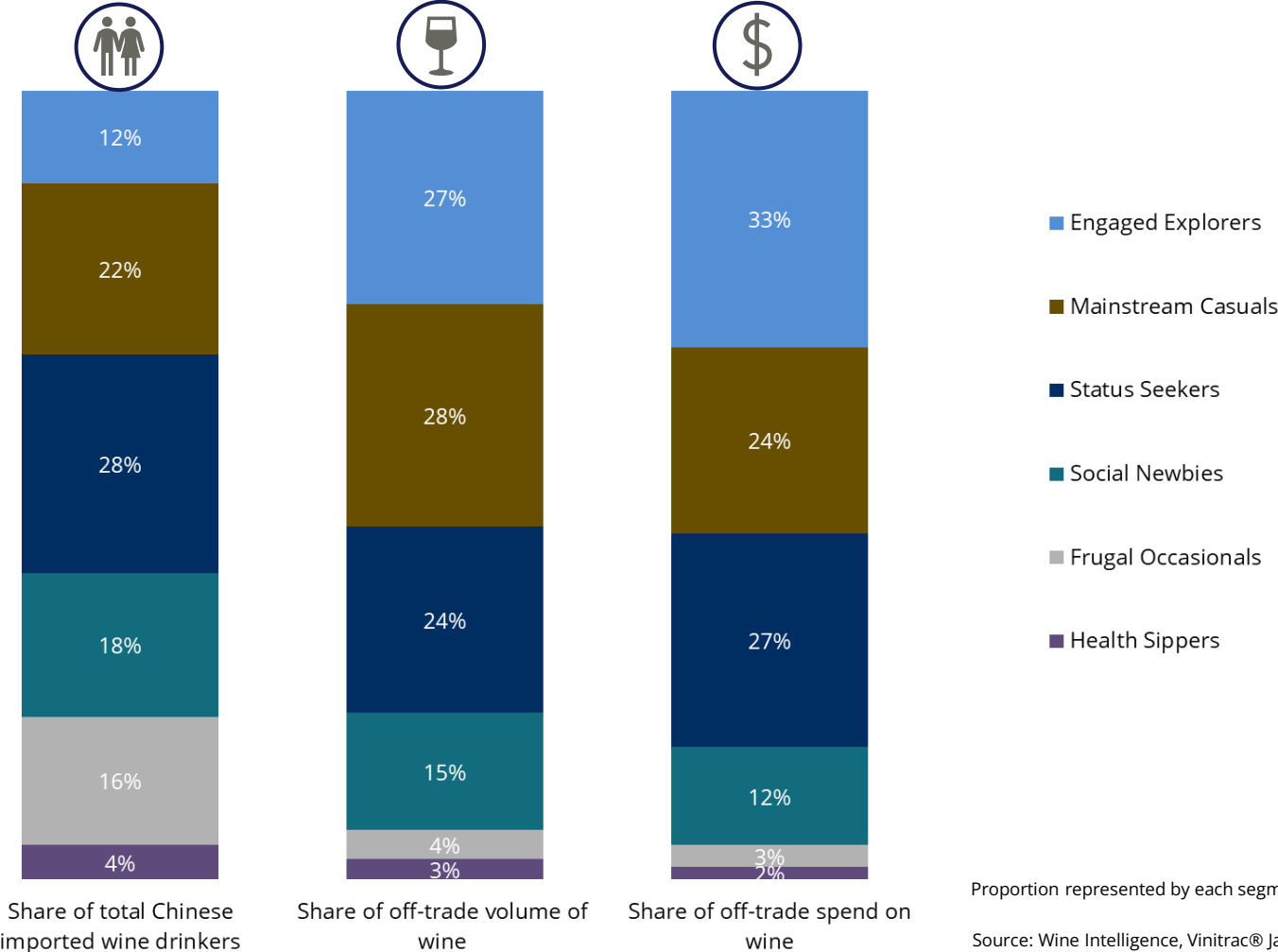
## Population, share of wine volume and share of spend on wine by China Portraits



Proportion represented by each segment with consumption and spend estimated based on recalled usage frequency and spend data  
 Source: Wine Intelligence, Vinitrac® Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers

# China Portraits market sizing: off-trade

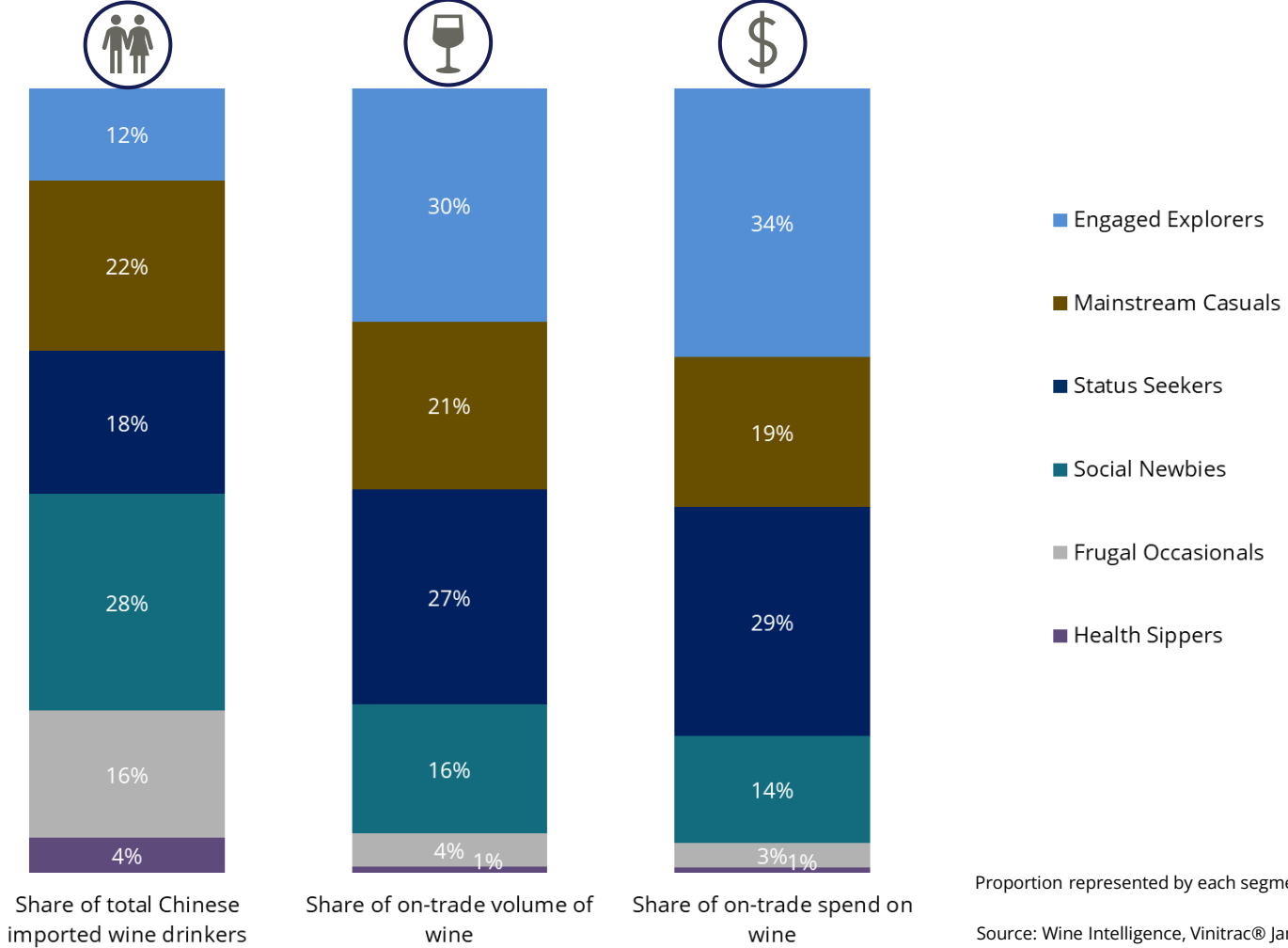
Population, share of wine volume and share of spend on wine in the off-trade





# China Portraits market sizing: on-trade

Population, share of wine volume and share of spend on wine in the on-trade



Proportion represented by each segment with consumption and spend estimated based on recalled usage frequency and spend data  
 Source: Wine Intelligence, Vinitrac® Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers

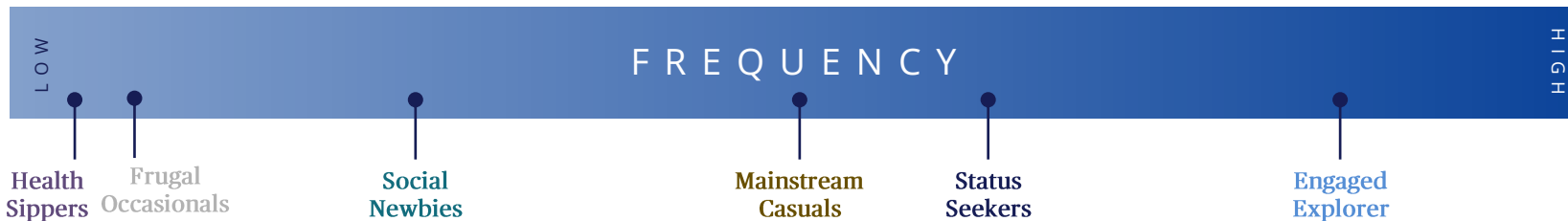
# 2022 portraits group: wine consumption

## Frequency each buys wine in the off-trade and on-trade

Wine consumption frequency (off-trade)



Wine consumption frequency (on-trade)



Source: Wine Intelligence, Vinitrac®, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers

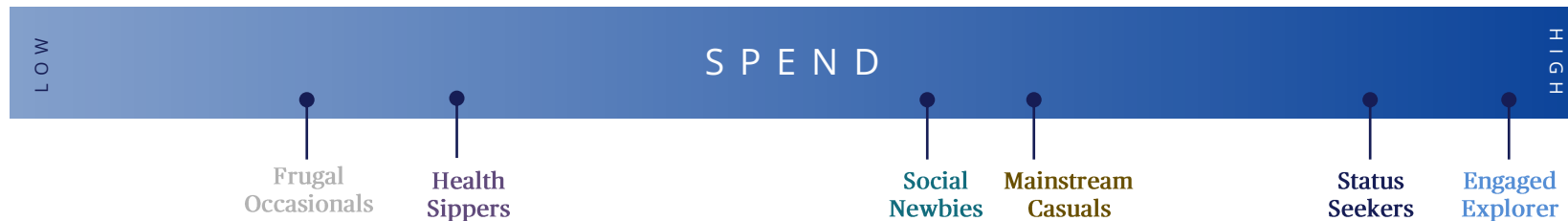
# 2022 portraits group: wine consumption

## Relative spend on wine by each group in the off-trade and on-trade

### Wine consumption spend (off-trade)

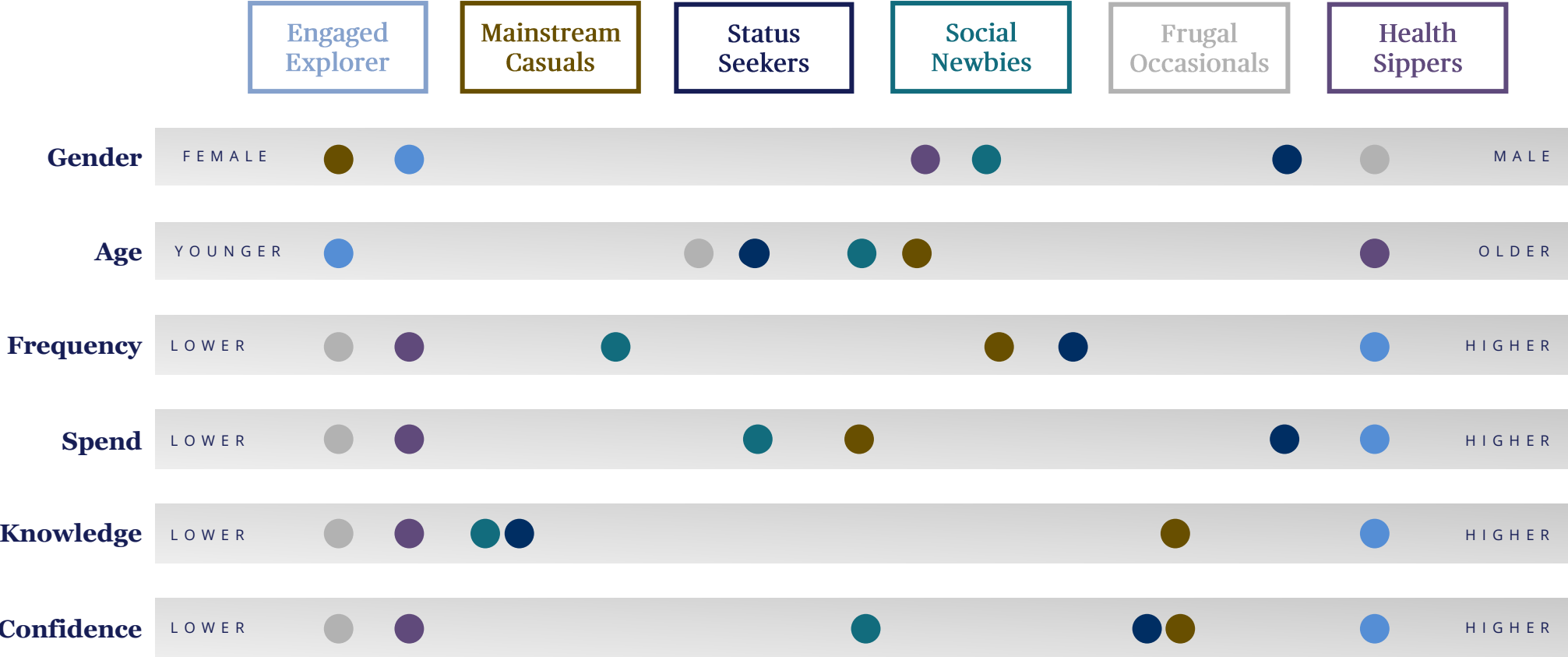


### Wine consumption spend (on-trade)



Source: Wine Intelligence, Vinitrac®, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers

# China Portrait key descriptors



Source: Wine Intelligence, Vinitrac®, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers

# China Portraits 2022: key segment attributes

|                                       | Engaged Explorers   | Mainstream Casuals  | Status Seekers  | Social Newbies  | Frugal Occasionals  | Health Sippers   |
|---------------------------------------|---|---|---|---|---|--|
| <b>Who</b> are they?                  | The youngest, higher income drinkers. They are the most knowledgeable and confident segment who enjoys drinking and learning about wine. Likely to have connections to the wine industry. | Mid to older aged, frequent wine drinkers, value driven but moderately knowledgeable.   | Younger, more affluent, fairly frequent and high spending wine drinkers who are fairly knowledgeable. | Millennials and Gen Z consumers with average income. Many are from the central regions of China.              | Younger, medium income consumers, likely to be at the start of their professional careers. Have little knowledge and confidence about wine. | The oldest segment, with lower incomes who only drink wine at home and rarely in the on-trade. Fairly knowledgeable. |
| <b>Why</b> do they drink wine?        | They are adventurous and enjoy the experiences that come with discovering new wines and expanding their repertoires.  | Drinking wine is part of their routine and they frequently enjoy wine as a treat alone or with friends and family.            | Wine is a medium to demonstrate their taste and social status to others.                              | Wine is seen as a special treat to enjoy with friends every now and then.                                     | For social and business occasions.  | Usually as a healthy, luxurious treat.   |
| <b>Where</b> do they shop for wine?   | They have the broadest range of shopping channels of all consumers, including online.   | Though they do occasionally shop for wine in supermarkets or specialist stores, they are confident buyers in online channels. | Buy from exclusive sources they trust, such as wineries or brokers they are familiar with.            | No particular preference. They'd buy wine where it is convenient and offers good deals, such as hypermarkets. | Mostly online.  | Mostly online.   |
| <b>What</b> type of wine do they buy? | A broad repertoire of grape varieties, regions and brands, with a good mixture of both mainstream and niche products.   | Mostly mainstream grape varieties, origins and brands. Occasionally they treat themselves with something special.             | Niche, lesser-known varieties, origins or brands.   | A wide range of wines to be found in mainstream channels. They are open to trying new wines.                  | Influenced by what's on promotion and stick to known brands when selecting wine.  | Red wine, brands they recognise and wines on promotion.  |

# **Engaged Explorers**

**China Portraits**  
2022

# Engaged Explorers



## Who are the Engaged Explorers

- Female, higher-income, younger wine drinkers who drink frequently and are very knowledgeable and confident in the category with an eagerness to try new things.

## Interests and values

- Exploration – trying new things and using the wine category to create new experiences.
- Staying on-trend and supporting social causes; being inclusive and seen to do the ‘right thing’.

## Relationship with wine

- Adventurous – they enjoy the pleasure of discovering new wines and expanding their portfolios.
- Confident – they have the highest wine knowledge and confidence levels of all segments and are heavily engaged in the category.
- Frequent drinkers with wine being their go-to drink on almost all occasions.
- High spenders, though they understand higher prices don't necessarily translate into better quality.

## How to engage them on wine?

- Wine tastings, actively seek out opportunities to learn more.
- Social media – influencer, producer and critic accounts.

## Key challenge for wine brands

- Building loyalty and staying interesting. This group has a wide repertoire and likes to try new wines whenever possible, so it is often difficult for them to recall the names of brands and producers they've previously tried.

Engaged Explorer

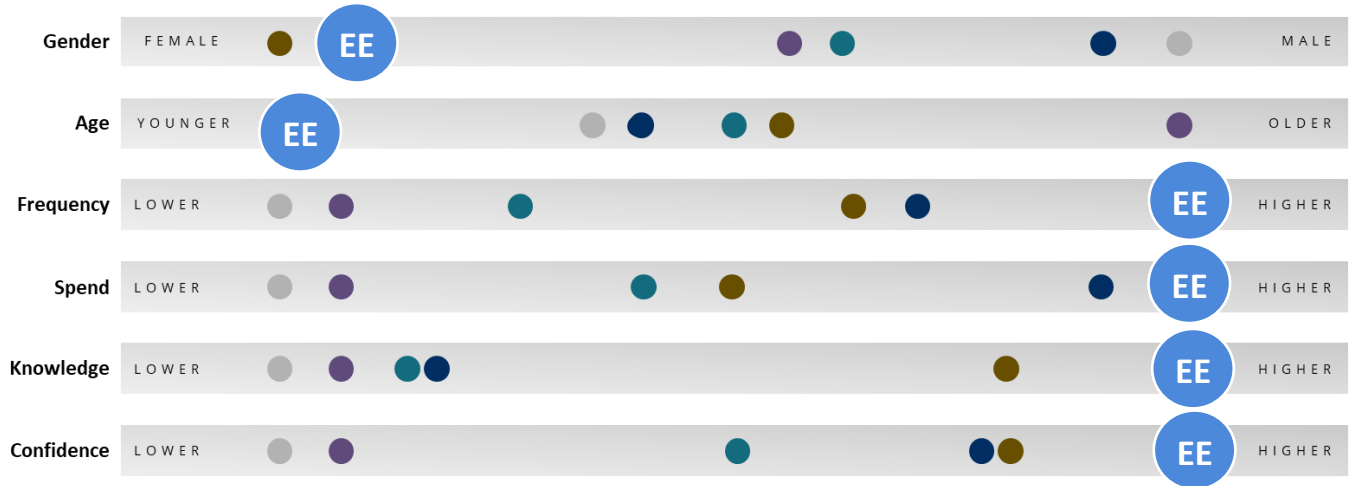
Mainstream Casuals

Status Seekers

Social Newbies

Frugal Occasionals

Health Sippers



## Where you might find them buying



## What you might find them drinking

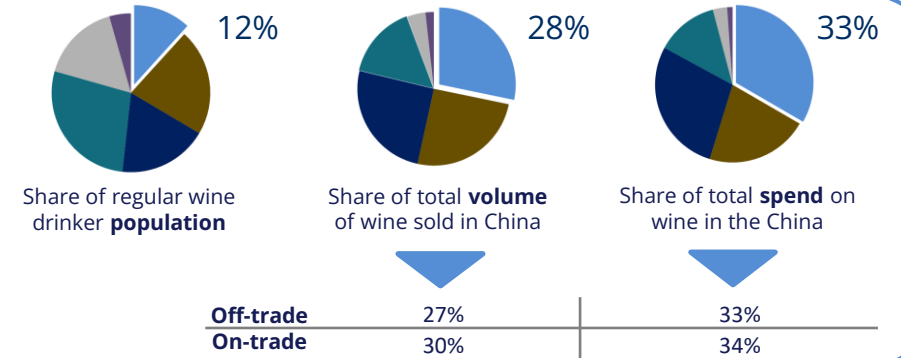


## Typical Engaged Explorer behaviour

- Spends about RMB300-500 on a bottle of wine.
- Have a good collection of wine at home, a mixture of mainstream brands and special bottles.
- Enjoys exploring the category through wine events, tastings, classes or even travelling abroad.
- Subscribes to wine-related social media accounts to stay up-to-date with the latest trends.
- Will have reliable go-to brands when with friends and family, but are always on the lookout for something new when drinking alone.
- Shop both online and offline to discover new wine styles.
- Often the person ordering wine when drinking with others in the on-trade.

# Engaged Explorers: Proportion of wine drinkers, volumes and spend on wine

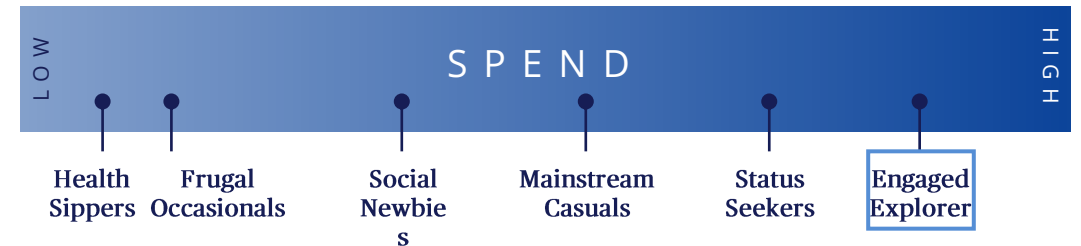
**Engaged Explorers** are the **most frequent and highest spending wine drinking consumers** in both off-trade and on-trade. They account for just over 10% of the wine drinking population in the Chinese market but **hold over a quarter of the share of total volume and spend** on wine.



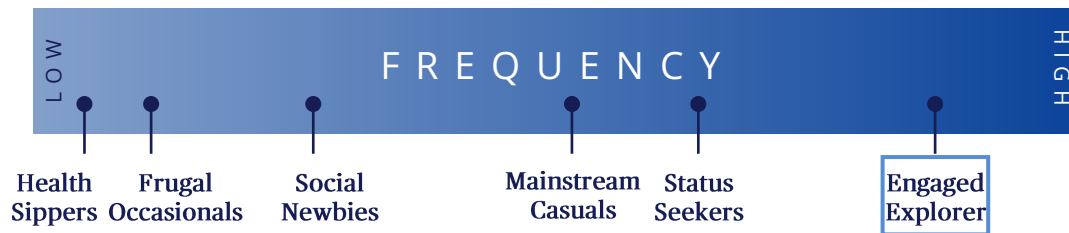
## Wine consumption frequency (off-trade)



## Wine spend (off-trade)



## Wine consumption frequency (on-trade)



## Wine spend (on-trade)



Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)  
 Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers



# Engaged Explorers: 2019 to 2021

Still come from younger, high income groups; appear to be purchasing alcoholic beverages less frequently

## What's the same

- They remain the most frequent, knowledgeable and confident wine drinkers.
- They are **still younger with high disposable income**.
- They enjoy exploring and learning about wine.
- Still the highest spending segment in both on-trade and off-trade

## What's different

- They are now the youngest wine drinkers in China.
- More even gender split.
- Less strong preferences for wine, though they are generally drinking fewer alcoholic beverages in general.
- Despite being the most knowledgeable consumers, they know less about countries, regions and varietals than in 2019. At the same time, they feel more confident than before.
- Unlike other segments, **their spending has not increased as much over the past few years**. That said, they are still the highest spending segment.

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## Q: What do Engaged Explorers think?

"There is not much change with my wine purchasing budget."

*Engaged Explorer, male*

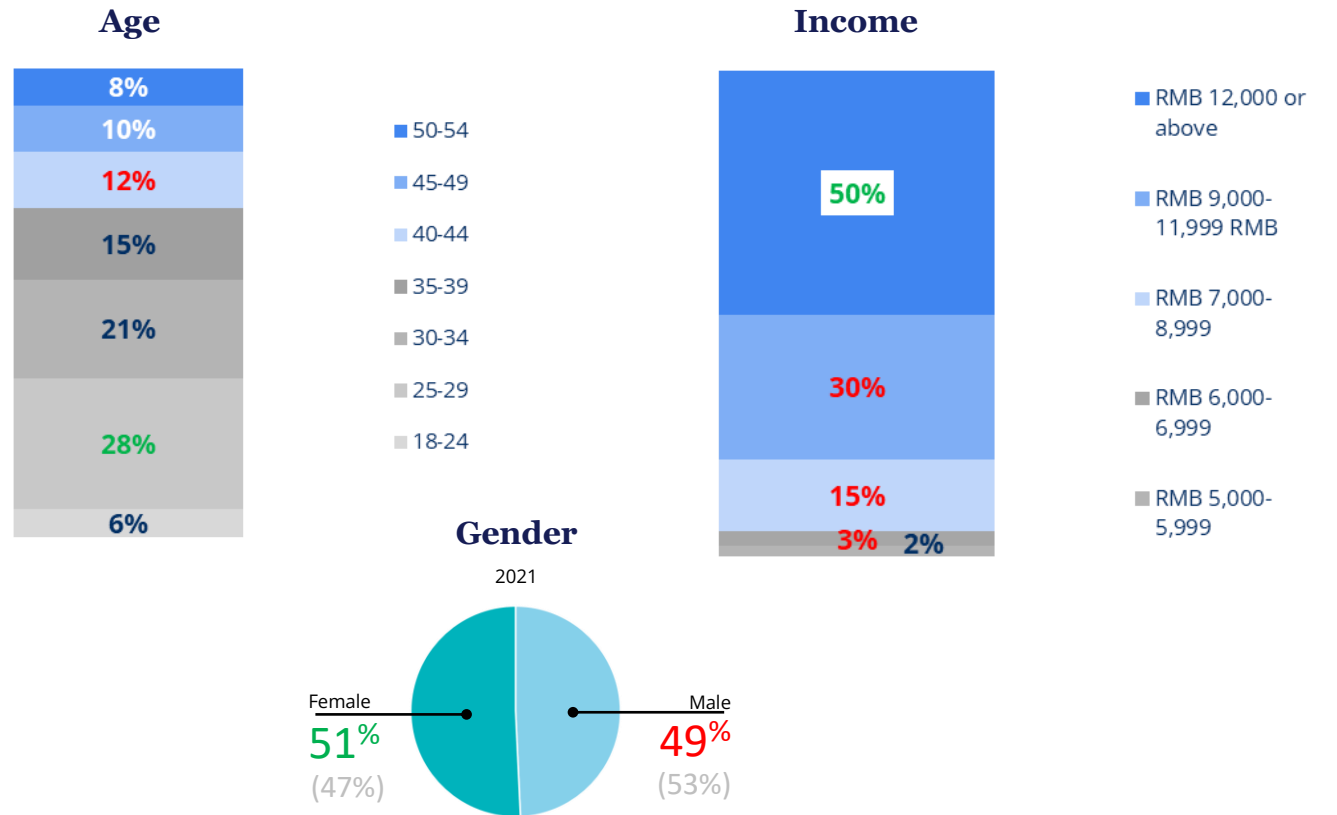
Source: Wine Intelligence, Vinitrac®, China, Mar '18, Jul '18, Oct '18, Jan '19 & Mar '19, (n=9,000) Chinese urban upper-middle class semi-annual imported wine drinkers  
Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers  
Wine Intelligence, consumer interviews (n=14)

# Engaged Explorers: Who are they?

Younger, higher-income, living in metropolitan areas

## Who are Engaged Explorers?

- **Slightly female-biased** (51% vs 47%), the highest proportion of women out of all the segments.
- **The youngest segment**, with over half aged below 35 years old.
- **High monthly personal income** relative to other segments.
- Similar geographic distribution to all Chinese regular wine drinkers, with a slightly higher proportion from Guangzhou and Shanghai.
- Significantly more consumers from this segment are married (89% vs 78%) and live with partner and children (79% vs 62%).
- The segment **most knowledgeable about the wine** category and the most confident in what they do know.
- **Most engaged with and adventurous** in the wine category, compared with other segments.



(%)=All Chinese upper-middle income semi-annual imported wine drinkers  
 Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)  
 Green / red: Statistically significantly higher / lower than all Chinese upper-middle income semi-annual imported wine drinkers at a 95% confidence level  
 Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers

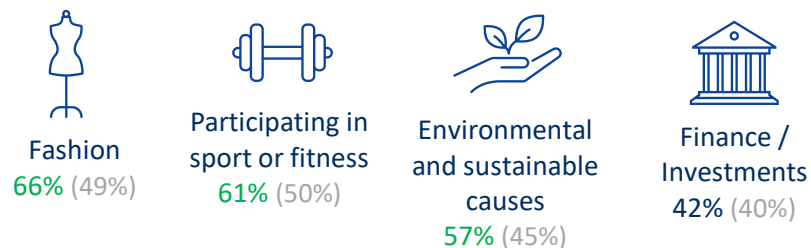
# Engaged Explorers: Values, attitudes, interests

Worldly and educated – and into fashion, sports / fitness, finance and the environment

## What's important to them?

- They are fashionable, health-conscious young consumers, over-indexing in hobbies such as keeping fit, dieting etc.
- Compared with regular wine drinkers, they are also more interested in business, investments and finance, often because of their career and social status.
- Well-travelled, experienced and educated, they **pay more attention to environmental and sustainable topics** than other wine drinkers.

## What are their interests?



## What are their attitudes

| Ranking |  | Semi-annual drinkers<br>(n=1,000) | Engaged Explorers<br>(n=117) |
|---------|--|-----------------------------------|------------------------------|
| 1=      | Investing in education is important to me  | 84%                               | 95%                          |
| 1=      | My home is an expression of my personal style  | 82%                               | 95%                          |
| 3       | I regularly read financial news or financial publications                              | 80%                               | 93%                          |
| 4       | I like to live a lifestyle that impresses others                                       | 80%                               | 92%                          |
| 5=      | I choose organic produce when its available  | 82%                               | 91%                          |
| 5=      | I expect the brands I buy to support social causes                                     | 82%                               | 91%                          |
| 7=      | I am typically willing to pay more for high-quality items                              | 85%                               | 90%                          |
| 7=      | Following others on social media is an important part of my daily life                 | 84%                               | 90%                          |
| 9       | I frequently choose active vacations with lots to do                                   | 77%                               | 89%                          |
| 10      | I am willing to pay more for a product that is environmentally or sustainably produced | 79%                               | 88%                          |

## Q: What do Engaged Explorers think?

"I like brands that spend an equal amount of effort on preserving our environment as they do in producing high quality wines."

*Engaged Explorer, female*

Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=1,000)

Green / red: Statistically significantly higher / lower than all Chinese upper-middle income semi-annual imported wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, China, Jan '21(n=1,000), Chinese urban upper-middle class semi-annual imported wine drinkers

Wine Intelligence, consumer interviews (n=14)

# Engaged Explorers: Motivation for drinking wine

Most frequent wine consumers who drink it on a variety of occasions. Many are either in the wine industry or know people who are

## Why do they drink wine?

- Engaged Explorers have a **genuine interest in and enjoy learning about wine**. Wine is an essential part of their lifestyle and identity.
- They are regular and habitual wine drinkers.
- They enjoy exploring the wine category. Part of the **pleasure comes with trying out new drinks and being knowledgeable**, especially in front of friends and families. They are likely to **have good connections to wine professionals**. As a result, they know they can find high quality wine at affordable, reasonable prices.
- Engaged Explorers most often **enjoy wine with meals, both in and out of the home**. Additionally, wine is consumed as a social drink when entertaining friends, dining out or relaxing during lunch breaks or at the end of the day.

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## Q: What do Engaged Explorers think?

“Wine is a daily drink for pleasure. Various origins, different tastes and interesting winery stories are very intriguing to me.”

*Engaged Explorer, male*

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## Q: What do Engaged Explorers think?

“Wine is a friend who guides me to a better life.”

*Engaged Explorer, female*

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## Q: What do Engaged Explorers think?

“My husband is working as a sommelier, so I know the importers and their pricing and quality very well.”

*Engaged Explorer, female*

Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)  
Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers  
Wine Intelligence, consumer interviews (n=14)

# Engaged Explorers: Wine engagement

Actively seeking opportunities to broaden their wine repertoire and knowledge

## How do they engage with wine?

- Engaged Explorers **have a genuine interest in the wine category**. They will actively seek opportunities to learn about wine, either through traditional media, the internet or knowledgeable friends.
- A significantly higher proportion of consumers from this segment claim to have attended wine tasting events or wine fairs.
- They enjoy trying new wine origins, varietals or styles whenever they can.
- Wine is a **medium through which they demonstrate their sophisticated taste and status to their social circle**; hence, they often drinks wine with meals in both casual and formal settings with friends, family and business acquaintances.

## What influences their choices?

- As knowledgeable, experienced drinkers, their choice of wines is based on **familiar brands / wineries, regions and varietals**.
- They are keen on **staying up-to-date with the latest trends** and would try out wines that are new to the market.

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### Q: What do Engaged Explorers think?

"The factors I would look at are uniqueness, value and taste."

*Engaged Explorer, female*

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### Q: What do Engaged Explorers think?

"I acquire my wine knowledge mainly from wine tastings, wine dinners, books, websites, WeChat posts, etc."

*Engaged Explorer, male*

Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)  
Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers  
Wine Intelligence, consumer interviews (n=14)

# Engaged Explorers: Alcohol repertoire and wine origins

Drink from a wide variety of beverages, though wine remains their top choice, especially from lesser-known regions and varietals

## What do they drink?

- Their adventurous attitude and high knowledge level extends to the range of alcoholic beverages they drink, over-indexing in the consumption of most beverage types.
- Reflecting their explorative attitude towards wine, they over-index on the consumption of many countries, regions and varietals.
- They are more likely to drink wine from many different regions, but especially look to buy wine from lesser-known ones.

## Beverage Repertoire: Top 5

| Ranking |            | Semi-annual drinkers<br>(n=7,294) | Engaged Explorers<br>(n=857) |
|---------|------------|-----------------------------------|------------------------------|
| 1       | Red wine   | 73%                               | 76%                          |
| 2       | Beer       | 58%                               | 62%                          |
| 3       | White wine | 50%                               | 59%                          |
| 4       | Whisky     | 39%                               | 54%                          |
| 5       | Champagne  | 37%                               | 51%                          |

## Country of Origin consumption: top 5

| Ranking |             | Semi-annual drinkers<br>(n=7,294) | Engaged Explorers<br>(n=857) |
|---------|-------------|-----------------------------------|------------------------------|
| 1       | China       | 66%                               | 69%                          |
| 2       | France      | 52%                               | 67%                          |
| 3       | Australia   | 27%                               | 42%                          |
| 4       | Italy       | 23%                               | 39%                          |
| 5       | New Zealand | 18%                               | 31%                          |

## Q: What do Engaged Explorers think?

"I drink wines from all origins. I prefer wines from the traditional countries/origins like Bordeaux in France or New Zealand. Their expected quality is more guaranteed."

*Engaged Explorer, female*

## Q: What do Engaged Explorers think?

"When I'm buying for drinking alone, I'd always pick something that is unique and I've not tried before."

*Engaged Explorer, male*

Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)

Green / red: Statistically significantly higher / lower than all Chinese upper-middle income semi-annual imported wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers

Wine Intelligence, consumer interviews (n=14)

# Engaged Explorers: Where they buy wine

They are confident shoppers who buy wine in a variety of channels while favouring specialist wine shops

## Where they buy wine

- Looking for every opportunity to expand their wine repertoire, they over-index in number of channels, particularly more specialist retailers.
- Retailers such as Sam's Club and GJW.com have become significantly more popular with this group in 2021.
- Confident in their knowledge, they are comfortable with choosing wine online**, often buying wine from specialists such as Tmall and JD.com.
- Many have good connections with the wine industry and more than a third would **buy wine directly from brokers or wineries**.

## Places you might find them buying wine



## Top 10 wine buying channels

| Ranking |  | Semi-annual drinkers<br>(n=7,294) | Engaged Explorers<br>(n=857) |
|---------|--|-----------------------------------|------------------------------|
| 1       | Wine shop / shop specialised in alcohol  | 50%                               | 65%                          |
| 2       | From an online retailer                  | 45%                               | 52%                          |
| 3       | Imported food and drinks stores          | 30%                               | 42%                          |
| 4       | From a winery's website                  | 26%                               | 41%                          |
| 5       | Directly from broker                     | 24%                               | 40%                          |
| 6=      | Boutique supermarkets                    | 30%                               | 39%                          |
| 6=      | Department store                         | 30%                               | 39%                          |
| 6=      | From a supermarket / hypermarket website | 30%                               | 39%                          |
| 9       | From a winery during a visit             | 22%                               | 37%                          |
| 10      | Duty free                                | 24%                               | 35%                          |

Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)

Green / red: Statistically significantly higher / lower than all Chinese upper-middle income semi-annual imported wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers

Wine Intelligence, consumer interviews (n=14)

# Engaged Explorers: How do they shop for wine?

Controlled exploration drives their wine-buying choices; they start with a cue they know will provide quality and choose a wine they don't know within that

## How do they shop in the off-trade?

- Actively trying to expand their wine repertoire, they always look for wines of different varietals, regions or countries of origin.
- This segment has the highest proportion of consumers that purchase wine online, as this gives them the time and scope to find more information about the wine.
- Consumers from this segment are willing to spend more for better quality items. **They are the highest spending segment, typically spending about RMB 300-500 on a bottle of wine for treats or informal meals at home.**
- Despite being the highest spending segment, with good knowledge of wine and connections with wine professionals, Engaged Explorers don't always find it necessary to spend more than RMB 500 RMB on a bottle.

## Choice cues in the off-trade

| Ranking |   | Semi-annual drinkers<br>(n=7,294) | Engaged Explorers<br>(n=857) |
|---------|---|-----------------------------------|------------------------------|
| 1       | Grape variety                                 | 42%                               | 46%                          |
| 2       | Quality indicators                            | 40%                               | 44%                          |
| 3=      | The region of origin                          | 38%                               | 42%                          |
| 3=      | The country of origin                         | 38%                               | 42%                          |
| 5=      | Words describing the flavour of the wine      | 42%                               | 40%                          |
| 5=      | Vintage                                       | 37%                               | 40%                          |
| 7       | A brand I am aware of                         | 36%                               | 34%                          |
| 8=      | Recommendations from wine critic or writer    | 28%                               | 28%                          |
| 8=      | Opportunity to taste the wine before purchase | 27%                               | 28%                          |
| 10      | Back label information                        | 26%                               | 26%                          |

## Q: What do Engaged Explorers think?

"I would look at flavours, style and origin. The most important factor to me is flavour. It must taste good."

*Engaged Explorer, female*

Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)

Green / red: Statistically significantly higher / lower than all Chinese upper-middle income semi-annual imported wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers

Wine Intelligence, consumer interviews (n=14)



# Engaged Explorers: What brands do they buy?

A wide range covering mainstream and lesser-known brands and a range of price points

## What brands do they buy?

- Experienced wine drinkers who have tried mainstream through to niche brands, at both lower and higher price points.
- Brand is not a major decisive factor when purchasing wine for their own consumption.
- However, when picking a bottle for friends and family, they often go for brands they have tried before to be on the safe side.

## Brands you might find them drinking



## Wine choices of Engaged Explorers



## Q: What do Engaged Explorers think?

"Brand influences my purchase decision to some extent. I purchase a familiar brand if it is for a family dinner because I know its taste and quality. But brand is not so important if I'm drinking alone."

*Engaged Explorer, male*

Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)

Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers  
Wine Intelligence, consumer interviews (n=14)

# Engaged Explorers: how do they engage in the on-trade?

Frequent drinkers who buy based on what they're familiar with, as long as it's not too expensive

## Wine in the on-trade

- Wine is their drink of choice in on-trade settings, such as business meals at restaurants and dining out with the family.
- **A significantly higher proportion of consumers from this segment consume wine at wine fairs and tastings**, seeing them as another opportunity to try out new and niche wines not often found in mainstream channels.
- They enjoy wine with an informal meal in a restaurant, or on a night out at a bar, café or karaoke venue, more frequently than other segments.
- Engaged Explorers are the highest spending segment in the on-trade, typically spending more than RMB 500 per bottle in the on-trade.

## Choice cues in the on-trade

| Ranking |  | Semi-annual drinkers<br>(n=7,294) | Engaged Explorers<br>(n=857) |
|---------|--|-----------------------------------|------------------------------|
| 1       | Where the wine comes from in the menu                | 36%                               | 42%                          |
| 2       | Wine style (eg red wine, white wine, sparkling wine) | 38%                               | 41%                          |
| 3       | Vintage  | 27%                               | 34%                          |
| 4=      | Brand that I know                                    | 32%                               | 33%                          |
| 4=      | Grape varieties                                      | 29%                               | 33%                          |
| 6       | A description of how the wine tastes in the menu     | 23%                               | 22%                          |
| 7       | Food matching  | 25%                               | 20%                          |
| 8       | Price  | 21%                               | 17%                          |
| 9=      | Recommendation from those who dine with me           | 20%                               | 15%                          |
| 9=      | Pictures of wines in the menu                        | 16%                               | 15%                          |

## Q: What do Engaged Explorers think?

"I would order a wine at RMB 300-500 per bottle in restaurants. There are less choices at lower prices and their quality is usually not good."

*Engaged Explorer, female*

Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)

Green / red: Statistically significantly higher / lower than all Chinese upper-middle income semi-annual imported wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers

Wine Intelligence, consumer interviews (n=14)

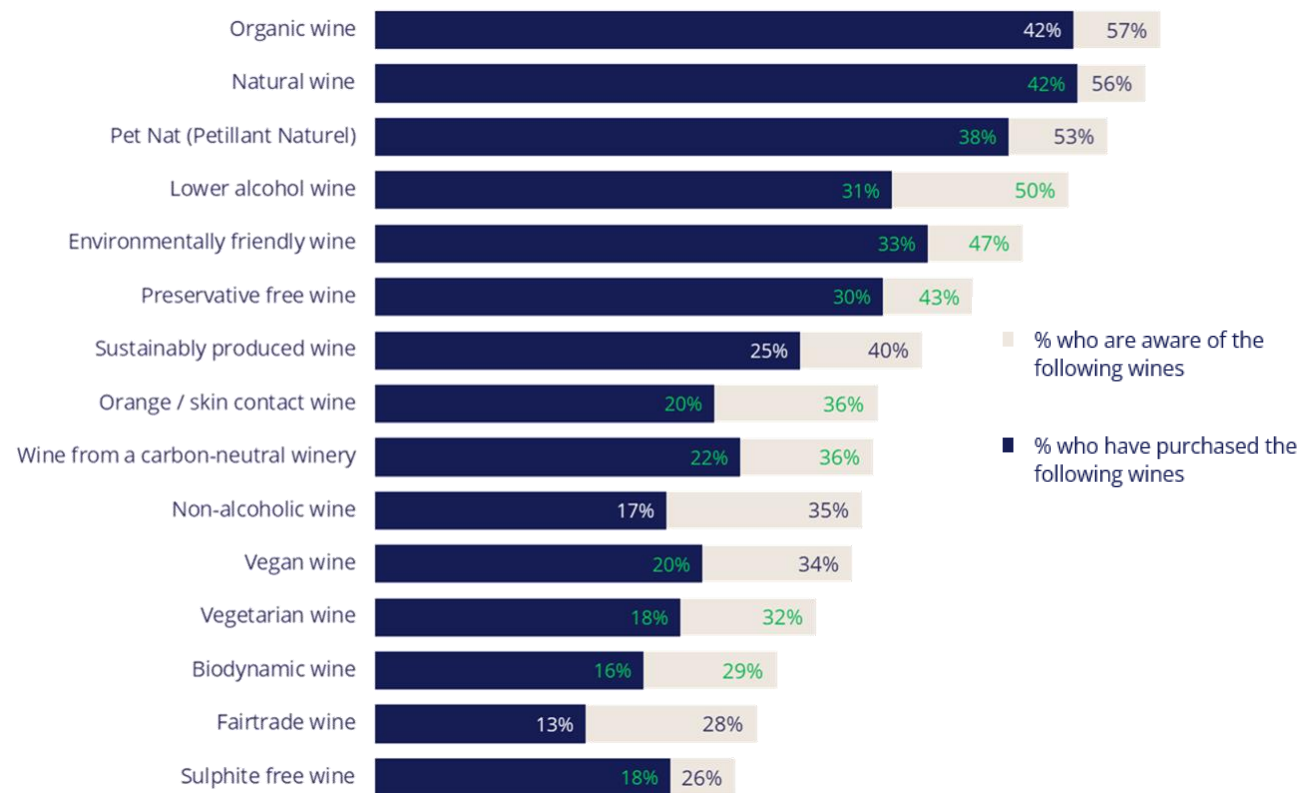
# Engaged Explorers: Alternative wines

## Fairly good awareness of alternative wines

### What do they think about alternative wines?

- Consistent with their attitudes and values, the segment has better awareness of alternative wine types compared with all Chinese wine consumers.
- Those who do know and buy alternative types do so because of promotions at wine events they have attended.
- Despite open attitudes, affinity with alternative wines remains low.
- Lack of availability in the market is a factor contributing to lower affinity and consumption.

### Awareness and purchase of alternative wines



Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=1,000)

Green / red: Statistically significantly higher / lower than all Chinese upper-middle income semi-annual imported wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, China, Oct '21 (n=1,000), Chinese urban upper-middle class semi-annual imported wine drinkers

Wine Intelligence, consumer interviews

### Q: What do Engaged Explorer think?

“I have tried most of them but rarely buy them because there are much more options available from the traditional, classic wines.”

*Engaged Explorer, male*

# Engaged Explorer: Adelin

**Adelin is a 32-year-old married woman with a two-year-old daughter, living and working in Shanghai**



## How does wine fit into your life?

Wine is a very close family member and friend to me, I enjoy drinking wine anywhere on any occasion with any people. As someone who is currently studying WSET Level 3, I believe I have good wine knowledge and this makes me confident about my opinions and choices. I attend wine tastings and classes whenever I have the opportunity and now have friends who are wine professionals. In fact, my husband is working as a sommelier in a wine bar in Shanghai.

While wine is my best companion in life, my relationship with wine has evolved over the years. I used to enjoy wine exclusively and keep a distance from other types of alcoholic beverages. However, with my increasing knowledge of alcoholic drinks, I now enjoy all kinds including beer, which is a high-value and relaxing drink. In general, I would say that wine is the best choice of beverage for socialising, especially on occasions when beer and baijiu are not good choices.

## Which wines do you enjoy drinking?

I drink wines from all origins, but I prefer wines from the traditional countries/origins like Bordeaux in France or New Zealand. This is because their expected quality is more guaranteed. With my rich experience with wine, I've drunk too many brands. Generally speaking, I like Chablis, classic Germany Riesling, Chilean wines, and boutique wineries from France. I used to drink Australian reds but now they are no longer easily available. I would say that all of the wines I enjoy having are classic wines to be shared with family and friends.

## How do you choose your wine?

The first time I ever had wine was when I was in university, during a class on wine. Since then, I have accumulated a lot of experience, in both tasting and purchasing. Generally speaking, I would buy wines from both online and offline channels, but mainly from importers. These are friends of mine and my husband, who is a sommelier. I know the importers, their pricing and quality very well. I usually try to find a quality importer on such occasions. So it is safe to say that I don't find any challenges when purchasing a wine, except when I have to buy a big brand. That is when I would worry about quality due to improper transportation and storage. Speaking of brands, I prefer purchasing a brand I am familiar with for my family and non-wine industry friends. The factors I would look at are uniqueness, value, and taste. For myself, I go for anything that is new on my friends' wine lists. Compared with before, I don't spend much time choosing a wine because I am very clear about which wine to buy. I just dial in and tell the contact which one I want, and no longer will I care much about variety, venue or brand.

# **Mainstream Casuals**

**China Portraits**  
2022

# Mainstream Casuals



## Who are Mainstream Casuals?

- Middle-aged, average income wine drinkers who genuinely enjoy wine. They are knowledgeable drinkers with a reasonable level of confidence. This is the segment which closest resembles wine drinkers in more mature wine markets.

## Interests and values

- Entertaining at home. They enjoy spending more time at home with family. They also like entertaining guests at home, which is a way they express their personal style.
- Staying healthy, both physically and mentally.

## Relationship with wine

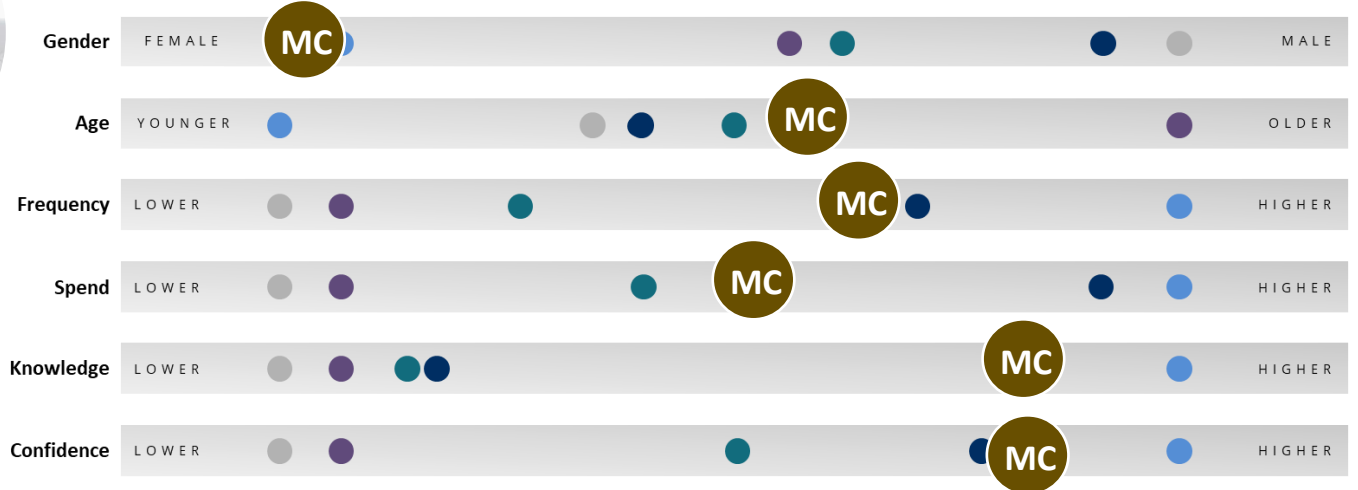
- Frequent off-trade drinkers, enjoying wine at home alone or with friends and family.
- They drink wine mainly from the mainstream category but will explore new wines from time to time.
- Fairly good knowledge of wine. They learn about wine through frequent encounters. Less eager and active in seeking to expand their wine knowledge.
- Value-oriented, medium spenders, they understand that higher prices don't necessarily translate into better quality wine.

## How to engage them with wine?

- Recommendations – while they are confident in making their own decisions, they do listen to and seek out advice from professionals when trying out new brands / wine styles.
- Tasting / winery visits, providing opportunities to taste wine. Once they find something they like, they are likely to keep drinking it.

## Key challenge for wine brands

- How to stand out among all the options available in mainstream channels such as supermarkets and online retailers.



## Where you might find them buying



## What you might find them drinking

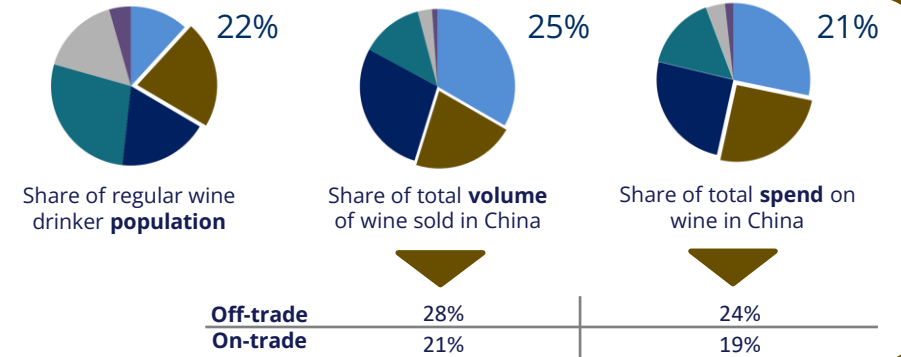


## Typical Mainstream Casual behaviour

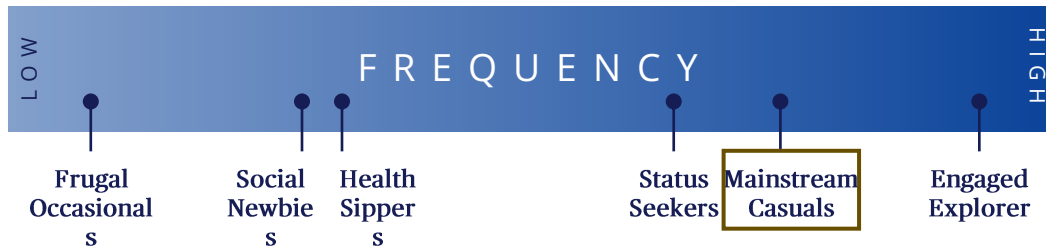
- Buys wine to drink at home with friends and family.
- Typically buys wine at 100-300RMB per bottle.
- Typically buy wine from mainstream channels like wine stores where quality is guaranteed and where they can interact with staff on recommendations.
- Confident to purchase wine online as well, but prefers offline stores for the experience.
- Often buys wine directly from wineries they have been to as well.
- Drinks in the on-trade, mostly for special occasions.
- Spends about RMB 300-500 per bottle in the on-trade.

# Mainstream Casuuls: Proportion of wine drinkers, volumes and spend on wine

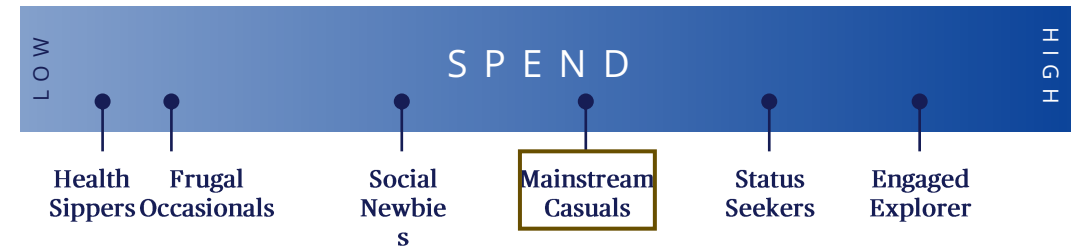
**Mainstream Casuuls** are the **second most frequent wine drinking consumers in the off-trade**. They are medium spenders in both on-trade and off-trade. They make up almost **a quarter of the wine drinking population** in the Chinese market, accounting for a fifth of the total wine spend.



## Wine consumption frequency (off-trade)



## Wine spend (off-trade)



## Wine consumption frequency (on-trade)



## Wine spend (on-trade)



Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)  
 Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers

# Mainstream Casuals: 2019 vs 2021

Still one of the most involved segments, they are drinking less but spending more

## What's the same?

- They are still very much involved in wine and drink it for pleasure.
- They are still quite knowledgeable about wine with a diverse repertoire, though often focusing on mainstream wines.
- Similar geographical distribution as in 2019, the majority coming from northern or eastern China (e.g. Beijing, Shanghai).

## What's different?

- The segment has more female and younger drinkers than in 2019. Their average income is also slightly higher than before.
- While their knowledge remains the same, the segment is much more confident about buying wine by themselves. Lack of information when purchasing wine is less likely to be a barrier and they are not as reliant on recommendations as they were before.
- The segment is drinking less for informal occasions, such as with meals. They are drinking wine for celebrations, which corresponds with an increased consumption of sparkling wine.
- As with trends seen in other mature wine markets, Mainstream Casuals are drinking less but spending more in both on- and off-trade across all occasions.

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## Q: What do Mainstream Casuals think?

"I used to listen to others' recommendations. Now I know more about what I like and choose wines myself."

*Mainstream Casual, female*

Source: Wine Intelligence, Vinitrac®, China, Mar '18, Jul '18, Oct '18, Jan '19 & Mar '19, (n=9,000) Chinese urban upper-middle class semi-annual imported wine drinkers  
Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers  
Wine Intelligence, consumer interviews (n=14)

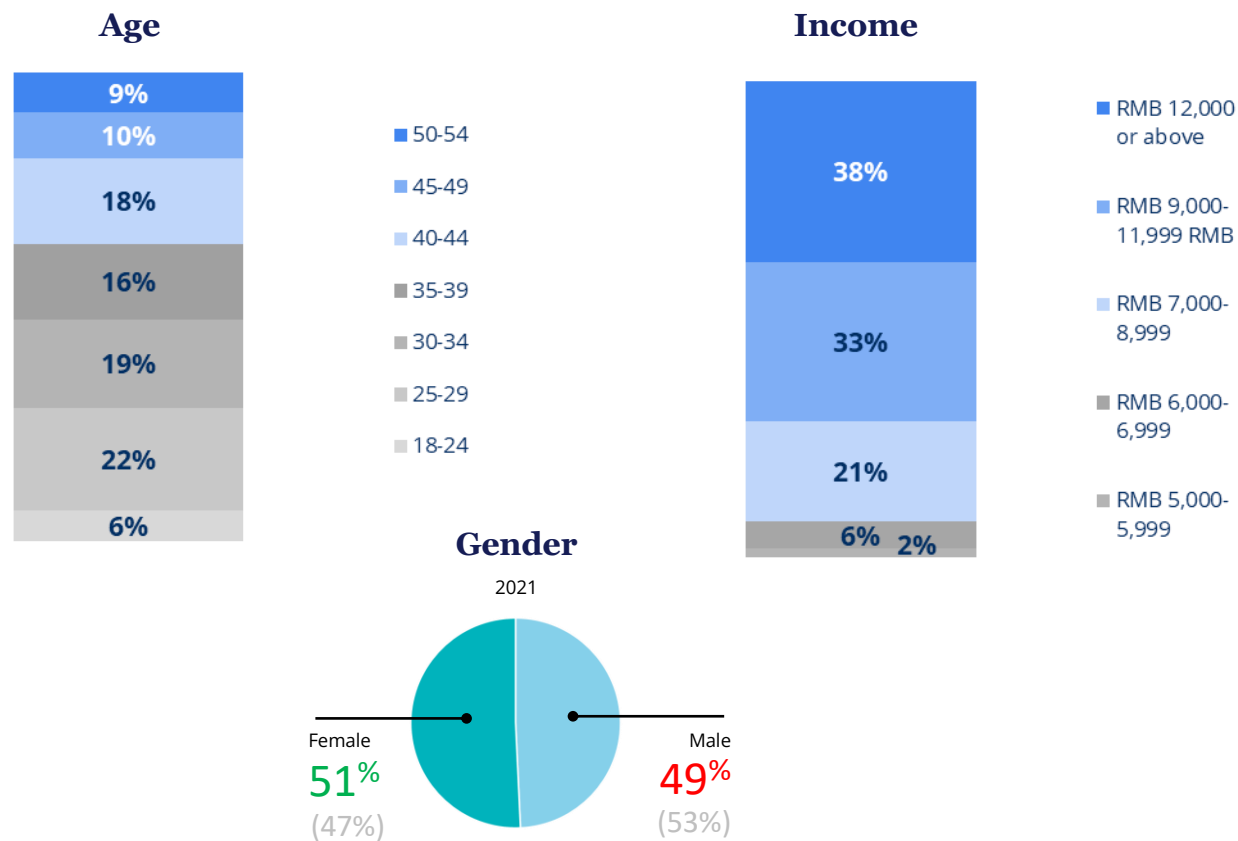


# Mainstream Casuals: Who are they?

Older, experienced, medium to higher income wine drinkers who are confident about the wine category

## Who are Mainstream Casuals?

- Slight **female bias** compared with the regular wine drinking population (51% vs 47%).
- **Middle-aged**, with more than two-thirds above 30 years old.
- Similar income distribution to all regular Chinese wine drinkers, with most earning above RMB 7,000 per month.
- Similar geographic distribution to all Chinese regular wine drinkers.
- Most are married (83% vs 78%) living with their partner and children (73% vs 62%).
- The **second most knowledgeable and confident segment** about the wine category.
- These are the wine consumers who most closely resemble typical drinkers in other mature wine markets.



(%)=All Chinese upper-middle income semi-annual imported wine drinkers  
Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)

Green / red: Statistically significantly higher / lower than all Chinese upper-middle income semi-annual imported wine drinkers at a 95% confidence level  
Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers

# Mainstream Casuals: Values, attitudes, interests

Enjoy being at home; willing to pay more for better, sustainable products

## What's important to them?

- Being on-trend, in-the-know and challenging themselves with new experiences.
- Staying healthy and improving themselves mentally and physically.
- They enjoy staying at home, often treating themselves to good home-cooked meals with a glass of wine.
- Considered consumption, seeking out good value, sustainable and organic produce.

## What are their interests?



Participating in sport or fitness  
62% (50%)



Cooking  
59% (49%)



Environmental and sustainable causes  
54% (46%)



Healthcare  
49% (41%)

## What are their attitudes?

| Ranking |   | Semi-annual drinkers<br>(n=1,000) | Mainstream Casuals<br>(n=236) |
|---------|---|-----------------------------------|-------------------------------|
| 1       | Following others on social media is an important part of my daily life                                      | 84%                               | 91%                           |
| 2       | My home is an expression of my personal style   | 82%                               | 89%                           |
| 3       | I choose organic produce when its available   | 82%                               | 87%                           |
| 4=      | I am willing to pay more for a product that is environmentally or sustainably produced                      | 79%                               | 86%                           |
| 4=      | I expect the brands I buy to support social causes  | 82%                               | 86%                           |
| 6=      | Investing in education is important to me   | 84%                               | 85%                           |
| 6=      | I am typically willing to pay more for high-quality items   | 85%                               | 85%                           |
| 8=      | I am willing to give up convenience in return for a product that is environmentally or sustainably produced | 75%                               | 81%                           |
| 8=      | I regularly read financial news or financial publications   | 80%                               | 81%                           |
| 8=      | I frequently choose active vacations with lots to do  | 77%                               | 81%                           |
| 11      | My cultural / ethnic heritage is an important part of who I am  | 75%                               | 81%                           |
| 12      | I like to take my time to find out the best value option in everything I do                                 | 79%                               | 80%                           |

## Q: What do Mainstream Casuals think?

"I drink a little bit of everything, but my first choice is always wine because it is healthy with low calories."

*Mainstream Casual, male*

Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=1,000)

Green / red: Statistically significantly higher / lower than all Chinese upper-middle income semi-annual imported wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, China, Jan '21(n=1,000), Chinese urban upper-middle class semi-annual imported wine drinkers

Wine Intelligence, consumer interviews (n=14)

# Mainstream Casuals: Motivation for drinking wine

Genuinely enjoy wine in domestic settings and seek opportunities to explore new wines in mainstream channels

## Why do they drink wine?

- Wine is their staple item in the pantry. **It is something they enjoy drinking with meals or on its own for pleasure.**
- Wine is something to be **enjoyed at home**, whether as a treat for themselves or with family and friends at home.
- There is a sense of exploration that motivates wine drinking. With years of wine-drinking experience they have **begun to develop a genuine interest in wine and want to try more.** They have good knowledge of wine and are fairly confident with the category.
- Previously, Mainstream Casuals tended to explore within categories they were already familiar with, but the **pandemic has spurred a desire to try new wines.** Experimenting and treating themselves with new wines has been a fun activity during lockdown.
- Wine is increasingly more than 'just a drink' in their social lives. It is something that is a topic of conversation or even the focus of an event. They are likely to have been on winery visits or attended tastings.

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## Q: What do Mainstream Casuals think?

"Wine is very important. I don't need to drink it every day, but if there are more than two people at a meal, then it's time to crack open a bottle of wine."

*Mainstream Casual, female*

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## Q: What do Mainstream Casuals think?

"I drink a lot of wine, but I only understand the basics like regions, varietals and fermentation methods."

*Mainstream Casual, female*

Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)  
Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers  
Wine Intelligence, consumer interviews (n=14)

# Mainstream Casuals: Wine engagement

## Enjoys wine as a personal indulgence and explores within the mainstream channels

### How do they engage with wine?

- They **enjoy exploring and trying out new wines they find in the mainstream channels.**
- **Wine is learnt about through experience**, absorbing information in everyday life and from those around them. Despite claiming to be explorative, they are not as 'obsessed' with learning as Engaged Explorers.
- Though wine is still seen as a 'social drink' which they enjoy in domestic settings with friends and family, **it has also become something more personal and intimate.** They regularly have a glass of wine at the end of day alone just to relax.

### What influences their choices?

- Previously, Mainstream Casuals relied on knowledgeable friends when picking a bottle of wine, However, **as the segment has become more involved and experienced, they are more confident in making their own choices.**
- Cues indicating flavours and quality (e.g. flavour descriptions, varietals, region, country) are looked at when purchasing wine.

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### Q: What do Mainstream Casuals think?

"I prefer learning about wines as I encounter them. I don't like to take wine-related classes. I feel like it's too forced and goal-oriented and wine loses its charm."

*Mainstream Casual, male*

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### Q: What do Mainstream Casuals think?

"I often drink wine with friends. It is a good social catalyst to spark conversations."

*Mainstream Casual, Female*

Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)  
Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers  
Wine Intelligence, consumer interviews (n=14)

# Mainstream Casuals: Alcohol repertoire and wine origins

Wide wine repertoires, but often stick to mainstream wines which they can find easily

## What do they drink?

- Red wine is still the dominant drink in their repertoire, along with other mainstream alcoholic drinks.
- France is by far their top choice of country of origin, but they also tend to drink more wines from other major sources.
- Due to lockdown measures and domestic wine promotions during the pandemic, Mainstream Casuals have also turned more to Chinese wine. Almost three-quarters of Mainstream Casuals (72% vs 64%) who have drunk Chinese wine claim they are actively buying more domestic wine. About two-thirds (67% vs 59%) say they have more trust in Chinese wine than before.
- Beside the conventional varietals, they also over-index in lesser-known varietals that are on-trend on social media (e.g. Pinot Grigio and Chenin Blanc).

## Beverage Repertoire: Top 5

| Ranking |            | Semi-annual drinkers<br>(n=7,294) | Mainstream Casuals<br>(n=1,586) |
|---------|------------|-----------------------------------|---------------------------------|
| 1       | Red wine   | 73%                               | 82%                             |
| 2       | Beer       | 58%                               | 67%                             |
| 3       | White wine | 50%                               | 57%                             |
| 4       | Champagne  | 37%                               | 47%                             |
| 5       | Whisky     | 39%                               | 46%                             |

## Country of Origin consumption: top 5

| Ranking |           | Semi-annual drinkers<br>(n=7,294) | Mainstream Casuals<br>(n=1,586) |
|---------|-----------|-----------------------------------|---------------------------------|
| 1       | China     | 66%                               | 73%                             |
| 2       | France    | 52%                               | 64%                             |
| 3       | Australia | 27%                               | 34%                             |
| 4       | Italy     | 23%                               | 27%                             |
| 5       | Chile     | 18%                               | 22%                             |

## Q: What do Mainstream Casuals think?

"I used to drink only traditional wines, but now I am willing to try different regions, natural wines, or orange wine – even domestic natural wines from Ningxia and Yunnan."

*Mainstream Casual, male*

Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)

Green / red: Statistically significantly higher / lower than all Chinese upper-middle income semi-annual imported wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers

Wine Intelligence, consumer interviews (n=14)

# Mainstream Casuals: Where they buy wine

Specialist wine stores and supermarket are favoured, but they are increasingly turning to online retailers

## Where do they buy wine?

- **Wine shops still their top choice of channels**, along with supermarkets and imported food stores.
- Mainstream Casuals **are one of the most experienced groups of online shopper**. With higher confidence and explorative attitudes towards wine, Mainstream Casuals have been purchasing wines from online channels more than before, including from winery websites.

## Places you might find them buying wine



## Top 10 wine buying channels

| Ranking |  | Semi-annual drinkers<br>(n=7,294) | Mainstream Casuals<br>(n=1,586) |
|---------|--|-----------------------------------|---------------------------------|
| 1       | Wine shop / shop specialised in alcohol  | 50%                               | 63%                             |
| 2       | From an online retailer                  | 45%                               | 55%                             |
| 3       | Boutique supermarkets                    | 30%                               | 36%                             |
| 4=      | Imported food and drinks stores          | 30%                               | 35%                             |
| 4=      | Department store                         | 30%                               | 35%                             |
| 6       | From a supermarket / hypermarket website | 30%                               | 33%                             |
| 7       | Hypermarkets                             | 30%                               | 31%                             |
| 8       | From a winery's website                  | 26%                               | 29%                             |
| 9       | Duty free                                | 24%                               | 27%                             |
| 10      | Directly from broker                     | 24%                               | 23%                             |

## Q: What do Mainstream Casuals think?

"I do have friends who owns wineries, so sometimes I will order directly from them."

*Mainstream Casual, female*

Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)

Green / red: Statistically significantly higher / lower than all Chinese upper-middle income semi-annual imported wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers

Wine Intelligence, consumer interviews (n=14)

# Mainstream Casuals: How do they shop for wine?

## Medium spenders on everyday wines, picking wine within a category they are already familiar with

### How do they shop in the off-trade?

- Mainstream Casuals are frequent drinkers in the off-trade, drinking wine almost everyday for personal pleasure.
- They are **medium spenders**. With years of wine-drinking experience, they know what price is reasonable and that a high price does not guarantee quality. **Their typical spend for everyday drink is normally around RMB 200.** For an informal meal at home, they are willing to spend more as a personal treat, typically spending around RMB 200-400 per bottle of wine.
- Descriptions of flavour and quality are things they look at when purchasing wine.
- Like regular wine drinkers in China, more than a third of the segment would go for brands they are already familiar with.

### Choice cues in the off-trade

| Ranking |   | Semi-annual drinkers<br>(n=7,294) | Mainstream Casuals<br>(n=1,586) |
|---------|---|-----------------------------------|---------------------------------|
| 1       | Grape variety                                 | 42%                               | 48%                             |
| 2=      | Words describing the flavour of the wine      | 42%                               | 46%                             |
| 2=      | Quality indicators                            | 40%                               | 46%                             |
| 4       | The country of origin                         | 38%                               | 42%                             |
| 5=      | Vintage                                       | 37%                               | 41%                             |
| 5=      | The region of origin                          | 38%                               | 41%                             |
| 7       | A brand I am aware of                         | 36%                               | 36%                             |
| 8=      | Recommendations from wine critic or writer    | 28%                               | 26%                             |
| 8=      | Opportunity to taste the wine before purchase | 27%                               | 26%                             |
| 10      | Back label information                        | 26%                               | 24%                             |

### Q: What do Mainstream Casuals think?

"I would look at flavours, price and origin. The most important factor is flavour."

*Mainstream Casual, male*

Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)

Green / red: Statistically significantly higher / lower than all Chinese upper-middle income semi-annual imported wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers

Wine Intelligence, consumer interviews (n=14)

# Mainstream Casuals: What brands do they buy?

## Mainstream, easily accessible wines

### What brands do they buy?

- Brand repertoire is mostly made up by mainstream brands that are easily accessible from supermarkets or online.
- Brand is not necessarily a decisive factor when purchasing wine, but Mainstream Casuals like to buy within their comfort zone. They tend to stick to brands they have tried and liked.
- Every now and then they will try out new brands they encounter through social occasions and remember to drink them on future occasions.

### Wine choices of Mainstream Casuals



### Brands you might find them drinking



[yellow tail]\*



### Brands they have a high affinity with

[yellow tail]\*



### Q: What do Mainstream Casuals think?

"If I like certain brands, then I will remember it and buy it again. For example I love Penfold's Maxis"

*Mainstream Casual, female*

Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)  
Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers  
Wine Intelligence, consumer interviews (n=14)



# Mainstream Casuals: How do they engage in the on-trade?

## Infrequent drinkers in the on-trade; if they do drink it is often in casual settings

### Wine in the on-trade

- Mainstream Casuals prefer wine in domestic settings. When they do drink wine in the on-trade, they will try to make it worthwhile, so price is less of a factor.
- That said, from years of experience and knowledge, the segment knows what is a reasonable price range in the on-trade, and would rarely They tend to spend RMB 300-500 on a bottle.
- Similarly to the off-trade, Mainstream Casuals are medium spenders in the on-trade.

### Choice cues in the on-trade

| Ranking |  | Semi-annual drinkers | Mainstream Casuals |
|---------|--|----------------------|--------------------|
|         |  | (n=7,294)            | (n=1,586)          |
| 1       | Wine style (eg red wine, white wine, sparkling wine) | 38%                  | 45%                |
| 2       | Where the wine comes from in the menu                | 36%                  | 41%                |
| 3       | Brand that I know                                    | 32%                  | 35%                |
| 4       | Grape varieties                                      | 29%                  | 31%                |
| 5       | Vintage  | 27%                  | 28%                |
| 6       | Food matching  | 25%                  | 26%                |
| 7       | A description of how the wine tastes in the menu     | 23%                  | 22%                |
| 8       | Price  | 21%                  | 19%                |
| 9       | Recommendation from those who dine with me           | 20%                  | 17%                |
| 10      | Waiter / waitress to recommend wine                  | 16%                  | 13%                |

### Q: What do Mainstream Casuals think?

“RMB 300 is a safe bet. My friends have talked about this before, and we think usually, with the wines you will get at this price, the restaurant will get it from distributors at around RMB 100, which are adequate wines. If it's anything below this, the quality will not be promising. Anything above this price point would have to be for very special celebrations.”

*Mainstream Casual, female*

Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)

Green / red: Statistically significantly higher / lower than all Chinese upper-middle income semi-annual imported wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers

Wine Intelligence, consumer interviews (n=14)

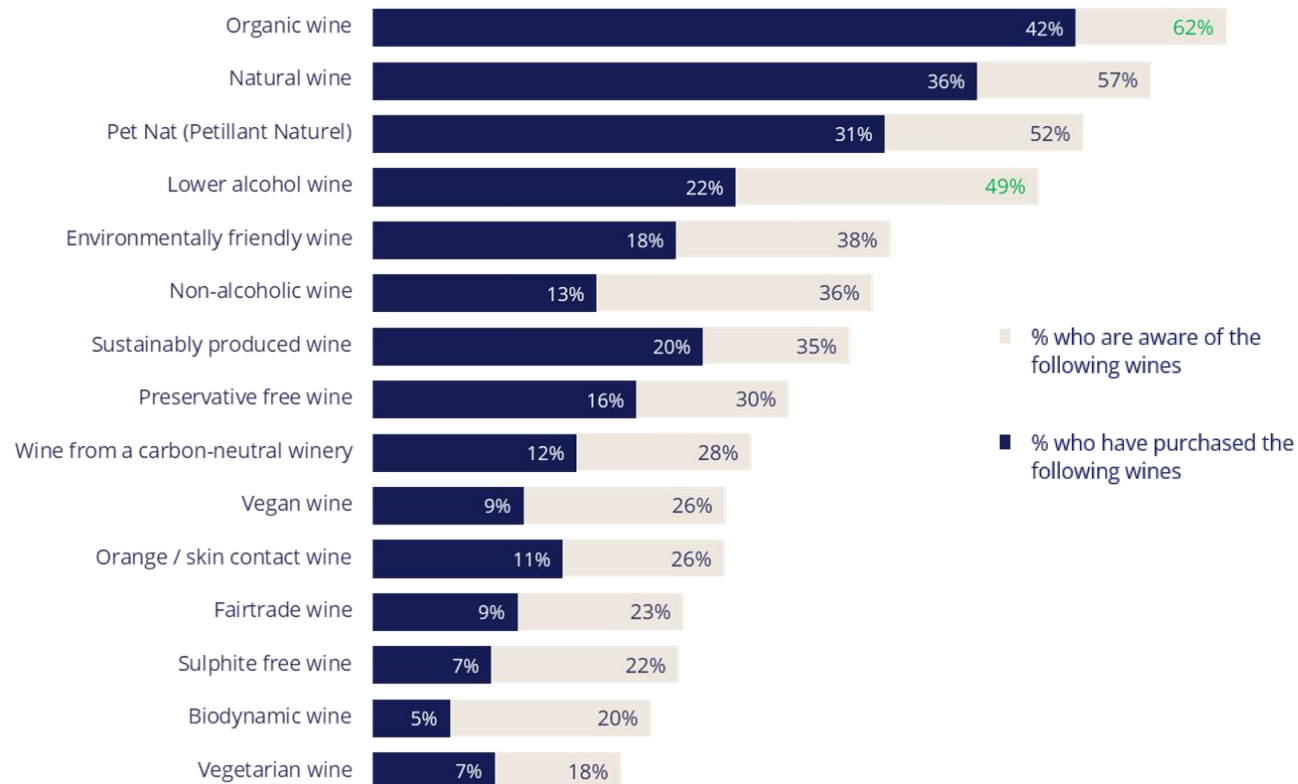
# Mainstream Casuals: Alternative wines

## Better awareness of alternative wines, particularly organics

### What do they think about alternative wines?

- Consistent with their attitudes and values, the segment has better awareness and purchase levels of alternative wine types than Chinese wine consumers generally.
- Alternative wines aren't typically considered as "wine" but rather as another type of drink, so it's not something Mainstream Casuals would tend to explore.
- Most are **open to try out organic wine / natural wines when given an opportunity**, though these factors wouldn't influence their choice of purchase.

### Awareness and purchase of alternative wines



Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=1,000)

Green / red: Statistically significantly higher / lower than all Chinese upper-middle income semi-annual imported wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, China, Oct '21 (n=1,000), Chinese urban upper-middle class semi-annual imported wine drinkers

Wine Intelligence, consumer interviews

### Q: What do Mainstream Casuals think?

"Organic wine/environmental/biodynamics wines all sound interesting, but not an important enough factor for me to buy them."

*Mainstream Casual, Male*

# Mainstream Casual: May

**May is a 40-year-old entrepreneur and mother of two boys. She has lived in Shanghai for over 10 years, working alongside her husband**



## How does wine fit into your life?

I have been drinking wine for a long time. In the past couple of years, I have started to keep a small wine fridge at home that holds 18 bottles at a time. Essentially it has become a staple item in the pantry. I don't need to drink it every day, but if there are more than two people at a meal, then it's time to crack open a bottle of wine. In general, I truly enjoy wine and it makes me happy. It is also a great item to have at social gatherings and a good option to pair with food. I will usually start a meal with beer as a pre-drink, but during meals and conversation, a glass of wine is a must.

Wine for me is something I have started to enjoy since my time in New Zealand, and that habit only increased over time. Yet, despite having understood more about wine, it revolves around what I enjoy or dislike. I have gone on wine tours before, and I have friends who own wineries and I purchase directly from them. I would say I don't understand the technicalities behind them. I see wine as a form of enjoyment and not something I'd want to study and learn something academically about. Recently there are many different forms of wine, yet I still prefer to stick to what I like. With popular wines like natural wines and organic wines, although I understand that they are unique, I would not try them if they did not go well with my flavour profile.

## Which wines do you enjoy drinking?

I started with New Zealand wines when I was around 15 or 16 years old, drinking red wines with my family. My flavour profile has remained the same despite having tried many things now, whether it's grape varietals or regions, so I can safely say that I still prefer Australian and New Zealand wines over wines from other regions. I like white wines better as red wines do not have the flavour profile I like. Whites are usually smoother and without the tannin. I believe wine is a very individual choice and, for me, flavour is the most important aspect, while value for money plays an important role as well.

## How do you choose your wine?

I used to buy wine based on others' suggestions. Now I am more comfortable with making my own decisions since I know exactly what I like and dislike. However, if I am unsure of something I encounter in a wine store, I will give my criteria to the shop staff and ask for suggestions. I would also buy wines based on my friends' suggestions, and we often buy wine in bulk now as a group purchase, since I do go through quite a few bottles at once. I research on platforms like Xiaohongshu, but I do not follow any official accounts. Generally speaking, I would buy wines at around RMB 100-300 because if you want a decent bottle of wine, I think at this price range you can have two or three bottles and that's a decent amount to drink. Anything pricier than this would have to be a special bottle of wine, or a special occasion, but it would mean less volume. Since there are so many wines to choose from, this price range is what I consider to have the best value for money. But to be honest, I will still bring home a bottle of any wine around a price I believe to be reasonable, from a region I like, if there is space in my wine fridge.

# **Status Seekers**

**China Portraits**

2022

# Status Seekers



## Who are the Status Seekers?

- Young, higher income male wine drinkers who are knowledgeable but highly confident. They are most likely to be single and living alone in cities.

## Interests and values

- Adventurous: They are young, single, and seeking every opportunity for an adventure.
- Seeking a lifestyle which could impress others and indicate their social status.

## Relationship with wine

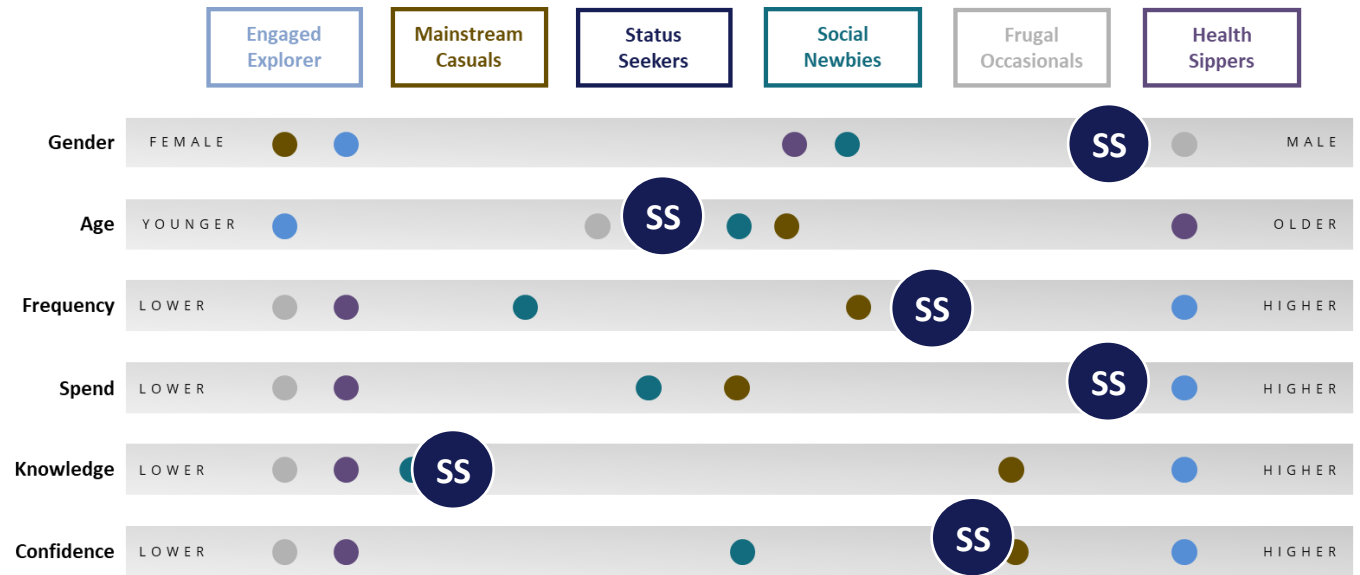
- Not quite into wine. Wine is merely a social or business drink for them. They generally prefer other alcoholic drinks over wine.
- They are frequent wine drinkers in the on-trade.
- They are high spenders who are comfortable spending more than RMB 500 on a bottle of niche wine to expand their horizons.
- Though not as knowledgeable as other more involved segments, they are very confident about their own wine choices.

## How to engage with them with wine?

- Social media – sommelier, producer and critic accounts.
- On-trade marketing – high end restaurants and hotels where they often meet others for business lunches / dinners.
- Uniqueness and high quality – they are always open to try something that is less mainstream and has won a medal.

## Key challenge for wine brands

- How to stand out from other alcoholic drinks.
- Lack of genuine interest in and curiosity about wine.



## Where you might find them buying



## What you might find them drinking

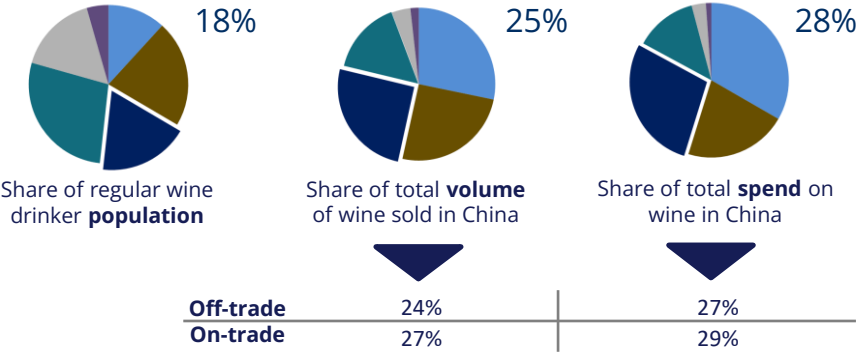


## Typical Status Seeker behaviour

- Spends above RMB 500 on a bottle of wine
- Shop for wine in supermarkets (likely to be high-end) that have everything they need and are convenient for last-minute buys.
- Look for traditional bottles of wine with classic label design or a medal.
- Drinks frequently in the on-trade for business lunches or dinners. Usually bring their own bottles if it is allowed at the venue.
- Confident to purchase wine alone, but would sometimes seek advice from online sommelier guides if the event they are attending is special.

# Status Seekers: Proportion of wine drinkers, volumes and spend on wine

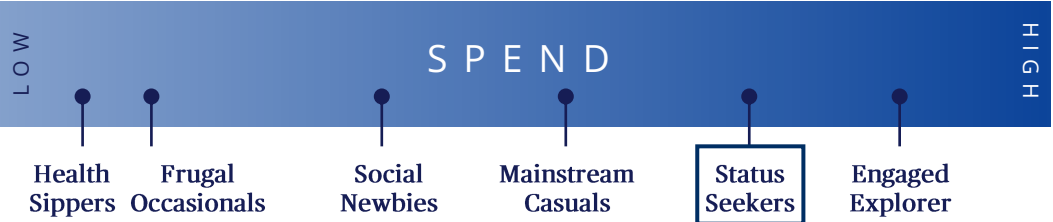
Status Seekers are the **second most frequent wine drinking consumers in the on-trade**. They are **high spenders** in both on-trade and off-trade. They make up just under **a fifth of the wine drinking population** in the Chinese market but account for more than a quarter of the total wine spend.



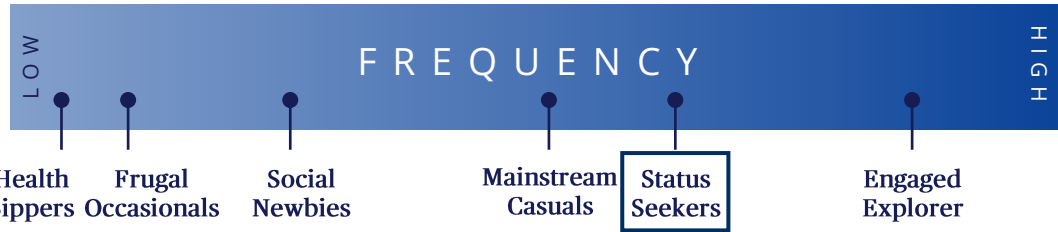
## Wine consumption frequency (off-trade)



## Wine spend (off-trade)



## Wine consumption frequency (on-trade)



## Wine spend (on-trade)



Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)  
 Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers

# Status Seekers: 2019 to 2021

**Remains one of the highest spenders; drinks more often for special social occasions or for business in the on-trade**

## What's the same

- Similar demographic traits: Young, wealthy, male-dominant.
- Fair knowledge of wine and very confident about picking their own wines.
- Still one of the highest spending segments. Despite finding wine to be less interesting, their typical spending is much higher across all occasions in both on-trade and off-trade.
- Drink wine less for pleasure but more for social events.

## What's different

- More of them are coming from Hangzhou and Shenzhen, where the headquarters of most large tech companies are situated.
- They are less interested in wine than before. A much smaller proportion claim they have drunk red and white wine in the past six months. This is also true for these consumers in other alcohol categories.
- Perhaps due to the pandemic and travel restrictions, the segment with the lowest affinity for domestic wine is now drinking significantly more Chinese wine than in 2019.

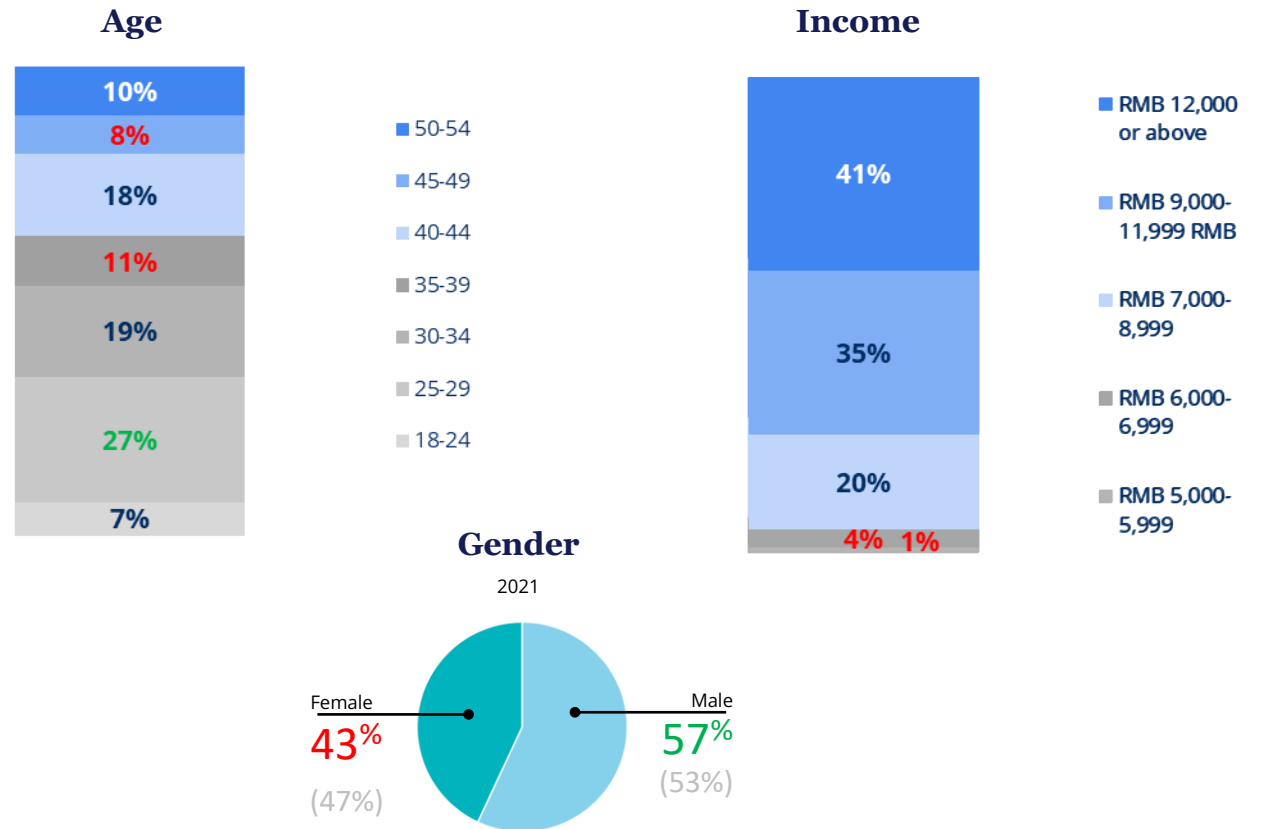
Source: Wine Intelligence, Vinitrac®, China, Mar '18, Jul '18, Oct '18, Jan '19 & Mar '19, (n=9,000) Chinese urban upper-middle class semi-annual imported wine drinkers  
Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers  
Wine Intelligence, consumer interviews (n=14)

# Status Seekers: Who are they?

## Younger, well-off, highly-confident male wine drinkers

### Who are Status Seekers?

- **Mainly male** wine drinkers.
- Coming from the **younger population and high-income groups**.
- Similar geographic distribution to Chinese regular wine drinkers generally.
- Have an average knowledge of wine but are highly confident with their wine choices.
- A high proportion of this segment are single (27% vs 17%) and living alone (22% vs 13%).



(%)=All Chinese upper-middle income semi-annual imported wine drinkers

Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)

Green / red: Statistically significantly higher / lower than all Chinese upper-middle income semi-annual imported wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers



# Status Seekers: Values, attitudes and interests

Seeking a lifestyle which fits with their social status: trendy, sophisticated, worldly and into good causes

## What's important to them?

- As they are still young and single, they are looking for every opportunity in life for an adventure.
- They seek to live an impressive lifestyle: on-trend, adventurous, sophisticated, supporting social causes, being inclusive and seen to do the 'right thing'.
- Expressing themselves, through fashion and creative endeavour.

## What are their interests?

  
Fashion  
46% (49%)

  
Environmental and sustainable causes  
45% (45%)

  
Movies or TV shows  
48% (42%)

  
Cooking  
41% (46%)

## What are their attitudes?

| Ranking |   | Semi-annual drinkers<br>(n=1,000) | Status Seekers<br>(n=152) |
|---------|---|-----------------------------------|---------------------------|
| 1       | I choose organic produce when its available   | 82%                               | 91%                       |
| 2       | I regularly read financial news or financial publications   | 80%                               | 88%                       |
| 3=      | Investing in education is important to me   | 84%                               | 87%                       |
| 3=      | Following others on social media is an important part of my daily life                                      | 84%                               | 87%                       |
| 5       | I like to take my time to find out the best value option in everything I do                                 | 79%                               | 86%                       |
| 6       | I am typically willing to pay more for high-quality items   | 85%                               | 85%                       |
| 7       | I am willing to give up convenience in return for a product that is environmentally or sustainably produced | 75%                               | 84%                       |
| 8=      | I like to live a lifestyle that impresses others  | 80%                               | 83%                       |
| 8=      | I expect the brands I buy to support social causes  | 82%                               | 83%                       |
| 8=      | I am willing to pay more for a product that is environmentally or sustainably produced                      | 79%                               | 83%                       |
| 9       | Risk-taking is exciting to me   | 65%                               | 83%                       |
| 10      | I actively volunteer in my local community  | 70%                               | 82%                       |

Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=1,000)

Green / red: Statistically significantly higher / lower than all Chinese upper-middle income semi-annual imported wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, China, Jan '21(n=1,000), Chinese urban upper-middle class semi-annual imported wine drinkers

# Status Seekers: Motivation for drinking wine

Wine is merely one of many drinks at social events which demonstrate their taste

## Why do they drink wine?

- Status Seekers are **medium-involved wine drinkers who see wine as one of many drinks at social events.**
- They drink wine because those around them are drinking wine, including friends, families, business clients etc.
- They are not especially interested in the wine category. They learn about wine as they encounter it at social events, but would not necessarily spend more time on improving their wine knowledge.
- They enjoy trying out new, niche wines, though this does not stem from genuine interest or curiosity, but rather from a desire to display their social status and wealth.
- They are **frequent and high-spending on-trade drinkers.**

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## Q: What do Status Seekers think?

"I don't particularly like wine, and it is not so important to me either, especially compared with liquors."

*Status Seeker, male*

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## Q: What do Status Seekers think?

"I drink wine as a way to cultivate taste and it helps with socialising and business interactions."

*Status Seeker, female*

Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)  
Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers  
Wine Intelligence, consumer interviews (n=14)

# Status Seekers: Wine engagement

**Socially-motivated to explore the category; seeking out less mainstream wines**

## How do they engage with wine?

- Wine is often chosen to be **'the drink' in the on-trade at business lunches / dinners.**
- They are not afraid to pay more for a high quality, premium bottle of wine to serve their business clients. Wine is a medium they use to indicate their sophisticated, elegant taste.
- Status Seekers don't buy as much in the off-trade. When they do, it is often to entertain guests.
- They prefer niche wines which are not readily available in the market, so they often buy wines directly on visits to wineries or from their websites.

## What influences their choices?

- **Quality and uniqueness** of wine are important factors for Status Seekers.
- When picking wine, they prefer **seeking professional advice from wine critics and reviews**, rather than from friends and families.

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## Q: What do Status Seekers think?

"I only consume wine on business occasions; less wine is consumed at private gatherings. It is more suitable for at least two to three people with a meal."

*Status Seeker, male*

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## Q: What do Status Seekers think?

"I use the website of the International Sommelier Guild as a reference, and WeChat public accounts that talk about wine. I don't think you need to spend too much effort though. Every year, you can find online evaluations (e.g. top 10 regions of the year, top 10 wines of the year, top 10 recommendation of the year). They are all very detailed."

*Status Seeker, male*

Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)  
Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers  
Wine Intelligence, consumer interviews (n=14)

# Status Seekers: Alcohol repertoire and wine origins

## Prefer quality and niche wines; under-index on mainstream origins and varietals

### What do they drink?

- While red wine is still a top choice for Status Seekers, a significantly smaller proportion of wine drinkers prefer red wine compared with the rest of the wine-drinking population.
- As part of their attempts to expand their alcohol repertoires, Status Seekers are more likely to have drunk white wine, rosé, sekt, Asti and Lambrusco,.
- They do not like to go for wines which are readily available through mainstream channels. As a result, they under-index on domestic and French wines which can be easily found in the supermarkets.
- The segment has a higher rate of consumption for Spanish wine – a niche source of wine in China – compared with the general wine drinking population.
- In line with their country-of-origin preferences, they also under-index on the mainstream varietals, but are more likely to have tried out less common ones including Tempranillo and Pinotage.

### Beverage Repertoire: Top 5

| Ranking |            | Semi-annual drinkers<br>(n=7,294) | Status Seekers<br>(n=1,331) |
|---------|------------|-----------------------------------|-----------------------------|
| 1       | Red wine   | 73%                               | 66%                         |
| 2       | White wine | 50%                               | 52%                         |
| 3       | Beer       | 58%                               | 46%                         |
| 4       | Rosé wine  | 37%                               | 45%                         |
| 5       | Whisky     | 39%                               | 38%                         |

### Country of Origin consumption: top 5

| Ranking |             | Semi-annual drinkers<br>(n=7,294) | Status Seekers<br>(n=1,331) |
|---------|-------------|-----------------------------------|-----------------------------|
| 1       | China       | 66%                               | 61%                         |
| 2       | France      | 52%                               | 47%                         |
| 3       | Australia   | 27%                               | 27%                         |
| 4       | Italy       | 23%                               | 25%                         |
| 5=      | New Zealand | 18%                               | 19%                         |

### Q: What do Status Seekers think?

"If it is not for business occasions, I only drink wine if there are no other drinks available. I prefer baijiu and whiskey"

*Status Seeker, male*

### Q: What do Status Seekers think?

"I have consumed wine from everywhere, even smaller regions like Georgia and Germany, but I prefer New Worlds like Chile, Argentina and Australia, because the wines from these regions would tailor their flavours towards what Chinese consumer like, unlike countries like France and wines with AOC certifications, who are keen on maintaining their tradition and refuse to change at all."

*Status Seeker, male*

Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)

Green / red: Statistically significantly higher / lower than all Chinese upper-middle income semi-annual imported wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers

Wine Intelligence, consumer interviews (n=14)

# Status Seekers: Where they buy wine

Less confident about quality from online retailers, usually only using reliable sources

## Where do they buy wine?

- **Wine shops are still the major channel** for Status Seekers, though a significantly lower proportion of wine consumers from this segment have used this channel (42% vs. 50%).
- **When a sudden, unexpected need to cater for guests arises** they will go to hypermarkets, which are in most areas and where quality can be assured. Delivery apps are often utilised to purchase wine from hypermarkets and supermarkets.
- Status Seekers are often concerned about the quality of wine sold through online retailers. They would much prefer buying wine directly from a source they trust, such as wineries or brokers.

## Places you might find them buying wine



## Top 10 wine buying channels

| Ranking |  | Semi-annual drinkers<br>(n=7,294) | Status Seekers<br>(n=1,331) |
|---------|--|-----------------------------------|-----------------------------|
| 1       | Wine shop / shop specialised in alcohol  | 50%                               | 42%                         |
| 2       | From an online retailer                  | 45%                               | 38%                         |
| 3       | Hypermarkets                             | 30%                               | 33%                         |
| 4       | From a supermarket / hypermarket website | 30%                               | 30%                         |
| 5       | From a winery's website                  | 26%                               | 29%                         |
| 6       | Department store                         | 30%                               | 29%                         |
| 7       | Boutique supermarkets                    | 30%                               | 28%                         |
| 8       | Imported food and drinks stores          | 30%                               | 28%                         |
| 9       | From a winery during a visit             | 22%                               | 26%                         |
| 10      | Directly from broker                     | 24%                               | 25%                         |

## Q: What do Status Seekers think?

"I usually buy from supermarkets. If I am in a rush to grab a bottle and heading out to a gathering, or going to a gathering that was arranged at the last minute, then the supermarket is the obvious choice."

*Status Seeker, male*

Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)

Green / red: Statistically significantly higher / lower than all Chinese upper-middle income semi-annual imported wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers Wine Intelligence, consumer interviews (n=14)

# Status Seekers: How do they shop for wine?

## High-spending consumption based on professional opinions

### How do they shop in the off-trade?

- Status Seekers are less likely to drink at home for personal enjoyment. When they do drink it is often also for **business occasions or other social occasions**.
- **Price is seen as a proxy of quality**. When faced with a choice they typically go for a higher-priced wine even if they've not tried it before.
- Even though they are confident with their wine knowledge, they often rely on professional opinions (wine critics, shop staff) when they need to pick a bottle.
- They are easily influenced by appearance. **Traditional, classy and sophisticated labels with a cork** are their go-to preferences.

### Choice cues in the off-trade

| Ranking |   | Semi-annual drinkers<br>(n=7,294) | Status Seekers<br>(n=1,331) |
|---------|---|-----------------------------------|-----------------------------|
| 1       | Words describing the flavour of the wine      | 42%                               | 40%                         |
| 2       | Grape variety                                 | 42%                               | 39%                         |
| 3       | Quality indicators                            | 40%                               | 37%                         |
| 4=      | Vintage                                       | 37%                               | 34%                         |
| 4=      | The region of origin                          | 38%                               | 34%                         |
| 6       | The country of origin                         | 38%                               | 33%                         |
| 7       | A brand I am aware of                         | 36%                               | 32%                         |
| 8       | Recommendations from wine critic or writer    | 28%                               | 31%                         |
| 9       | Opportunity to taste the wine before purchase | 27%                               | 29%                         |
| 10      | Recommendation by friend or family            | 29%                               | 28%                         |

### Q: What do Status Seekers think?

"If it's an important occasion (for both consuming in private and for gifts), then I would not buy New World wines with a screw-cap, since it does not look classy even if one knows the wine is actually quite good."

*Status Seeker, male*

Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)

Green / red: Statistically significantly higher / lower than all Chinese upper-middle income semi-annual imported wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers

Wine Intelligence, consumer interviews (n=14)

# Status Seekers: What brands do they buy?

Not particularly loyal to brands in the off-trade preferring lesser-known wines

## What brands do they buy?

- Brand is a less important factor for Status Seekers. They more often look at varietals and quality indicators rather than brand when buying wine.
- They often look for lesser-known, more exclusive brands which can only be found through certain channels.
- Like other segments, they'd pick a brand they have drunk before when drinking with friends or family to be safe.

## Brands you might find them drinking



## Wine choices of Status Seekers



## Q: What do Status Seekers think?

"I would prefer brands I knew. Some wines from regions like Georgia, Argentina and the US are lesser-known in China due to marketing, but they are actually really decent wines."

*Status Seeker, male*

Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)  
Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers  
Wine Intelligence, consumer interviews (n=14)

# Status Seekers: How do they engage in the on-trade?

Frequent and high-spending drinkers, most often for business or important social events

## Wine in the on-trade

- Status Seekers often consume wine in the on-trade, usually at **business-related events**.
- Beside wine origins and flavour descriptions, Status Seekers also choose wine from familiar brands to be safe.
- The segment see their choice of wine as an indication of their taste and their respect for their business clients. An expensive, classy-looking bottle of wine with a good meaning to its Chinese name is often considered as a good choice to serve at lunches / dinners.

## Choice cues in the on-trade

| Ranking |  | Semi-annual drinkers<br>(n=7,294) | Status Seekers<br>(n=1,331) |
|---------|--|-----------------------------------|-----------------------------|
| 1       | Wine style (eg red wine, white wine, sparkling wine) | 38%                               | 33%                         |
| 2       | Where the wine comes from in the menu                | 36%                               | 32%                         |
| 3       | Brand that I know                                    | 32%                               | 31%                         |
| 4       | Grape varieties                                      | 29%                               | 29%                         |
| 5=      | Vintage  | 27%                               | 26%                         |
| 5=      | A description of how the wine tastes in the menu     | 23%                               | 25%                         |
| 7=      | Food matching  | 25%                               | 24%                         |
| 7=      | Recommendation from those who dine with me           | 20%                               | 21%                         |
| 9       | Price  | 21%                               | 20%                         |
| 10      | Chinese brand name carries good meaning              | 15%                               | 19%                         |

## Q: What do Status Seekers think?

“In the industry I work in, it is really common for us to bring a bottle or more to occasions while we talk business.”

*Status Seeker, female*

Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)

Green / red: Statistically significantly higher / lower than all Chinese upper-middle income semi-annual imported wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers

Wine Intelligence, consumer interviews (n=14)



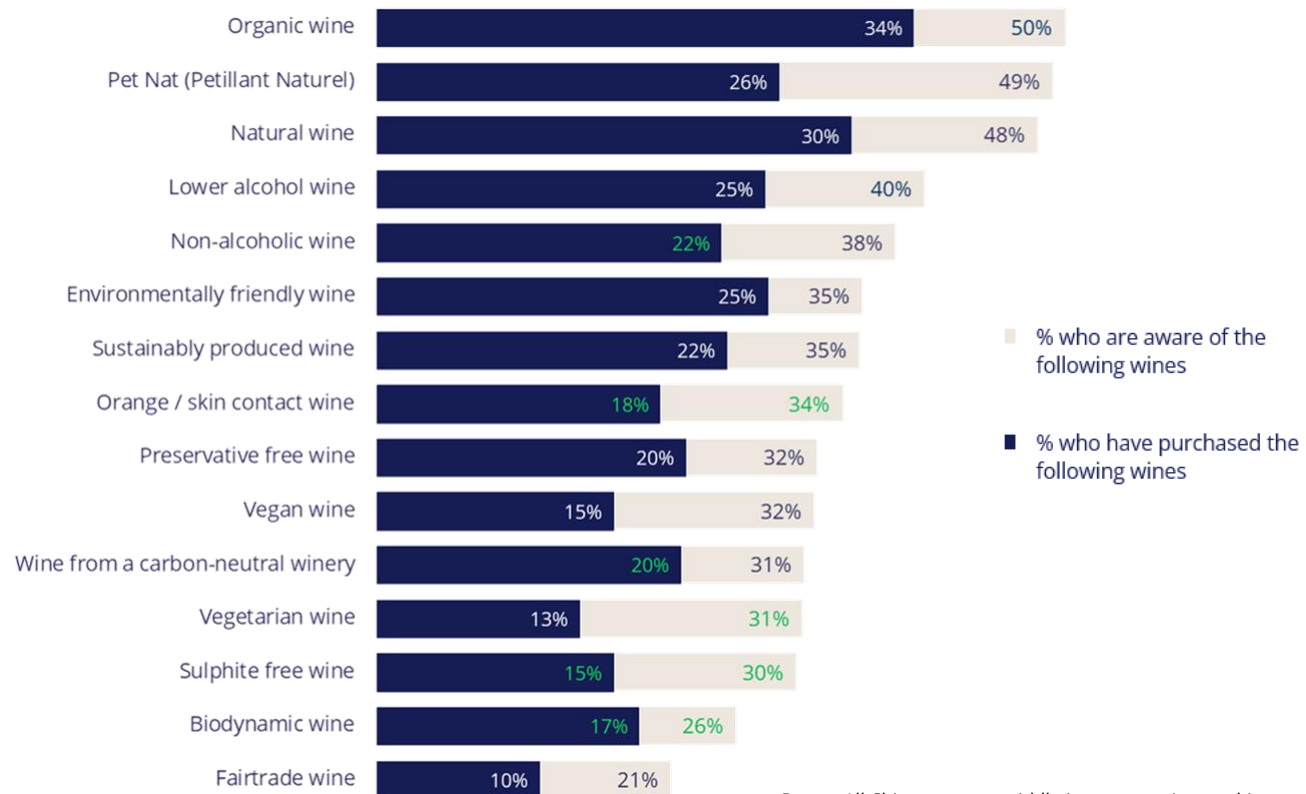
# Status Seekers: Alternative wines

## Lower awareness and purchase of alternative wines

### What do they think about alternative wines?

- Status Seekers are more likely to have purchased orange / skin contact wines than other wine consumers.
- Overall, awareness and purchase rates of alternative wines are still low.
- They are open to trying out these wines when available in venues, but they wouldn't actively seek to explore this category.
- There is concern about how alternative wine production methods would affect the flavour of wine.

### Awareness and purchase of alternative wines



Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=1,000)

Green / red: Statistically significantly higher / lower than all Chinese upper-middle income semi-annual imported wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, China, Oct '21 (n=1,000), Chinese urban upper-middle class semi-annual imported wine drinkers

Wine Intelligence, consumer interviews

### Q: What do Status Seekers think?

“I don't want to purchase a wine just for its production philosophy. I can try natural wine in say, bars, but it has to be good to drink.”

*Status Seeker, male*

# Status Seekers: Thomas

**Tomas is a 30-year-old businessman. He often travels around the country and internationally for business**



## How does wine fit into your life?

I guess that is a tricky question. A big part of my life revolves around wine, yet I don't really like wine. I have been with my parents to different social and business gatherings since I was little, and wine would usually appear on the table, along with other alcoholic beverages, which is also where I had my first taste of wine. From my own observations, I can tell that wine is not a preferred type of drink for most people of my social circle, but rather as a back-up option when there are no Chinese spirits available. I know quite a bit about wine, yet it simply does not intrigue me as much as other types of beverage such as whiskey. Usually, I will drink wine because it is a necessity of the culture not to refuse to drink at business gatherings.

Nonetheless, with a particular group of friends, I will enjoy a bottle of wine with them at home, or when I am out having specific types of meals, usually French or Italian cuisines. I don't think wine is the type of beverage to be consumed alone; it needs to be shared among at least 2 to 3 people. So during gatherings, if I am not at home, I prefer to bring my bottle of wine, and only order at the restaurant if they don't allow wine. I dine out socially and professionally a lot, so I know how the price range should work.

## Which wines do you enjoy drinking?

I believe people around my age prefer New World wines. For me, it's Chilean, Argentinian and Australian wines that caught my attention. I have also had wines from smaller wine producing regions like Georgia during work occasions. I prefer this type of wine, with its crispiness and fresh flavor, as well as low tannins, partly because I prefer to drink it as soon as I open it, and not have to wait for a long time for it to breathe. This is also why I do not like to have French wines, say, Bordeaux, with its long breathing time and complicated flavors. It is not suitable for larger social gatherings and perhaps more for smaller groups of people. I also dislike Old World wines because they are stubborn; many of the New World's producers will tailor their wine to meet the flavor profile demands of the Chinese market, while the French will refuse to change at all. Since price is not an issue at all for me, I will choose to enjoy a bottle that caters to my palate.

## How do you choose your wine?

For me, even if time permits, I prefer to shop in actual stores, even though online purchases are certainly cheaper. Although I do know quite a bit about wine. I like to ask shop staff for opinions based on what food I am having. A lot of people will spend a lot of effort trying to find a good bottle of wine but, from my experience, that is unnecessary. If you search online, detailed information about different regions or top 10 wines of the year are all free online. It should be easy to find what you are looking for. I would also use the International Sommelier Guild as a reference.

# **Social Newbies**

**China Portraits**

2022

# Social Newbies



## Who are the Social Newbies?

- Young to middle-aged, medium income drinkers who are fairly new to the wine category.

## Interests and values

- Staying on-trend and supporting social causes, being inclusive and seen to do the 'right thing'.
- Enjoying an active lifestyle: travelling, socialising, looking for excitement.

## Relationship with wine

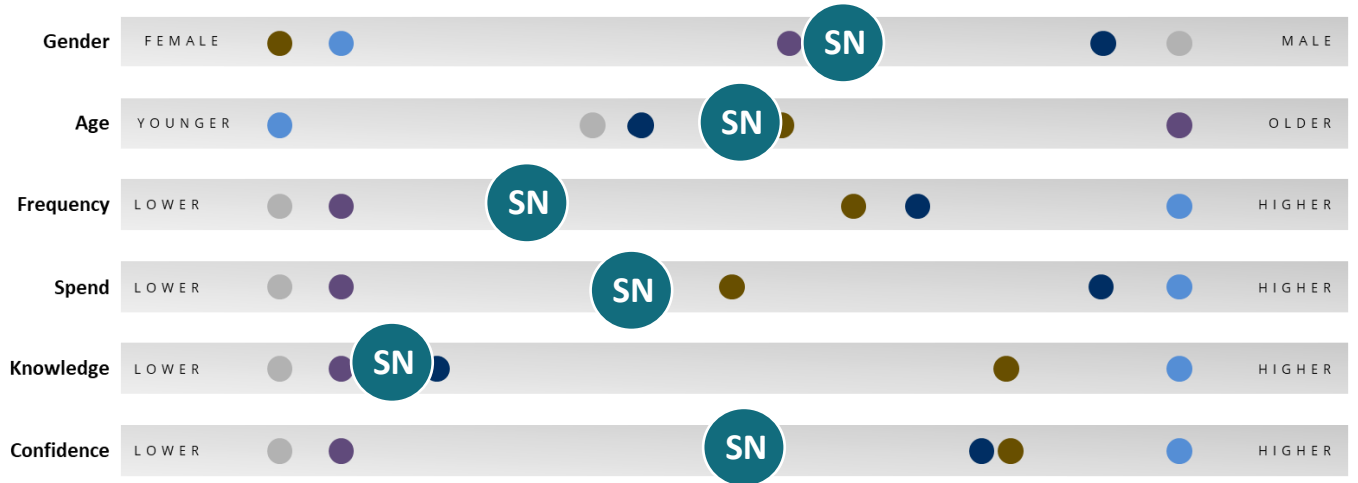
- They are relatively new to the category, have little knowledge and aren't very confident about purchasing wine on their own.
- Wine is something they enjoy with friends to give the occasion a sense of specialness.
- Value-driven, so they don't drink as much in the on-trade as it is often considered expensive.
- With relatively little experience, they are less influenced by how wine should taste, and are more open to trying out new and alternative options at affordable price points.

## How to engage with them with wine?

- Promotions, discounts, loyalty schemes.
- Social events – fun experiences that a role for wine (rather than wine-specific events).
- Availability in wine shops and hypermarkets, key places where they discover new wines.

## Key challenge for wine brands

- Being remembered – as they often go with group preferences, it is often difficult for them to recall what brands they have drunk.



## Where you might find them buying



## Typical Social Newbie behaviour

- Spends around 100 RMB in the off-trade
- Drinks wine to socialise with friends and guests
- Looks for wines which are recommended by friends or with a good price
- Shops offline where there is more information provided on shelves or where shop staff are available to make recommendations
- Rarely orders wine in the on-trade because it is too pricey. Typically brings their own bottle if wine is required for the occasion.
- Drinks in the on-trade for special occasions or business lunches / dinners

## What you might find them drinking



# Social Newbies: Proportion of wine drinkers, volumes and spend on wine

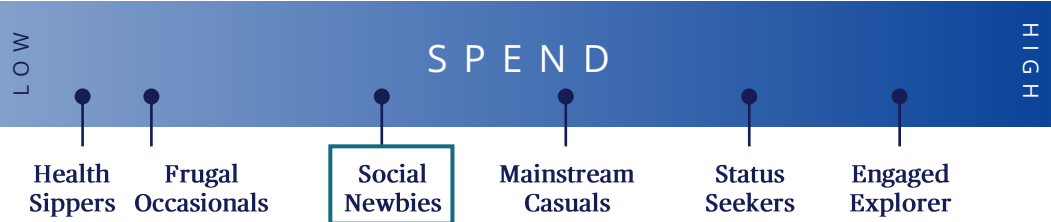
**Social Newbies** are the largest segment in the Chinese wine market. They are infrequent, **average spenders** in both on-trade and off-trade who take up just over 10% of the total spend in the Chinese wine market.

|           |     |     |
|-----------|-----|-----|
|           | 15% | 12% |
| Off-trade | 16% | 14% |

## Wine consumption frequency (off-trade)



## Wine spend (off-trade)



## Wine consumption frequency (on-trade)



## Wine spend (on-trade)



Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)  
 Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers

# Social Newbies: 2019 to 2021

Remain one of the less frequent and involved segments; still exploring different beverages at social occasions; spending more than previously

## What's the same

- Similar gender and geographical distribution.
- They remain one of the less frequent and involved segments, with lower levels of knowledge and confidence.
- Still value-driven drinkers, though they are spending much more than previous years.
- Drinking wine on social occasions rather than for pleasure.

## What's different

- The group is slightly older and comes from a higher income group than in 2019, possibly due career advancement over the past few years.
- Despite being less confident and knowledgeable drinkers than other segments, they are increasingly more explorative with different types of wines on social occasions and are drinking more sparkling wines like Prosecco and Sekt.
- They are generally drinking wine slightly more frequently than before.

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### Q: What do Social Newbies think?

"I know more about wine with my drinking experience, especially the different flavours of different wines."

*Social Newbie, male*

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### Q: What do Social Newbies think?

"About 3-4 years ago was my first time tasting wine. Now I drink a little bit more than at the beginning, usually at weekends."

*Social Newbie, female*

Source: Wine Intelligence, Vinitrac®, China, Mar '18, Jul '18, Oct '18, Jan '19 & Mar '19, (n=9,000) Chinese urban upper-middle class semi-annual imported wine drinkers  
Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers  
Wine Intelligence, consumer interviews (n=14)

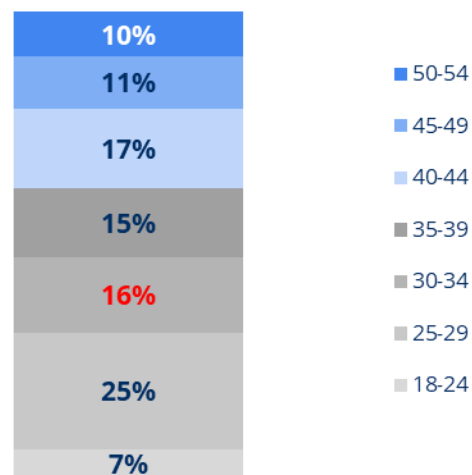
# Social Newbies: Who are they?

Young professionals, male, price-driven wine drinkers likely to be residing in the central regions

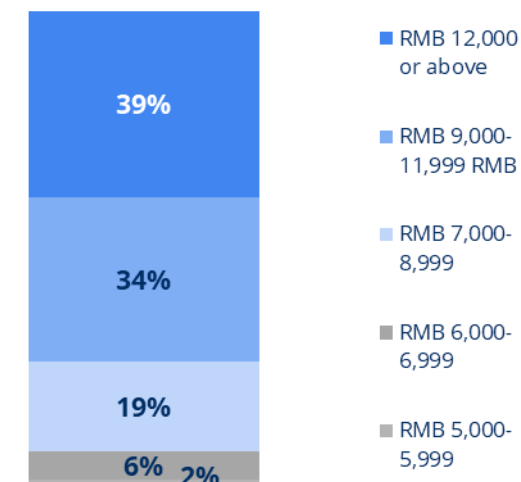
## Who are Social Newbies?

- Similar gender distribution as regular wine drinkers in China – slightly male-biased.
- Young to middle-aged (Millennials and Gen Z).
- Similar income distribution to all Chinese regular wine drinkers, with most earning above RMB 7,000 per month.
- Similar relationship and living status distribution to average wine drinkers (married, living with a partner and children).
- Similar geographic distribution when compared with all Chinese regular wine drinkers, with slightly fewer consumers located in Tier 1 cities and more in the central region.
- They are price-driven, fairly knowledgeable and confident with the wine category.

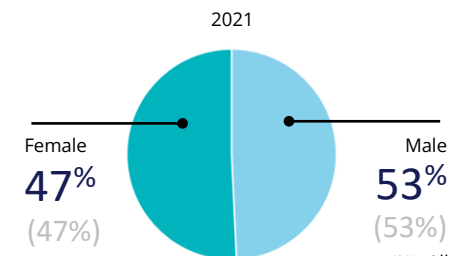
## Age



## Income



## Gender



(%)=All Chinese upper-middle income semi-annual imported wine drinkers

Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)

Green / red: Statistically significantly higher / lower than all Chinese upper-middle income semi-annual imported wine drinkers at a 95% confidence level

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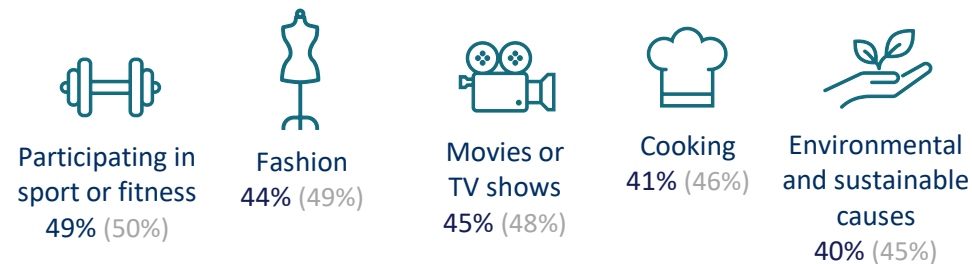
# Social Newbies: Values, attitudes and interests

A social group that enjoys excitement and supporting values they believe in

## What's important to them?

- Enjoys an active lifestyle: travelling, socialising, looking for excitement.
- Considered consumption, seeking out good value, sustainable and organic produce.
- Value-driven, but willing to pay more to support social causes and high quality items.

## What are their interests



## What are their interests?

| Ranking |  | Semi-annual drinkers<br>(n=1,000) | Social Newbies<br>(n=285) |
|---------|--|-----------------------------------|---------------------------|
| 1       | I expect the brands I buy to support social causes                               | 82%                               | 87%                       |
| 2       | I am typically willing to pay more for high-quality items                        | 85%                               | 85%                       |
| 3=      | I like to live a lifestyle that impresses others                                 | 80%                               | 80%                       |
| 3=      | I frequently choose active vacations with lots to do                             | 77%                               | 80%                       |
| 3=      | Following others on social media is an important part of my daily life           | 84%                               | 80%                       |
| 6       | I regularly read financial news or financial publications                        | 80%                               | 79%                       |
| 7=      | I like to take my time to find out the best value option in everything I do      | 79%                               | 78%                       |
| 7=      | Investing in education is important to me  | 84%                               | 78%                       |
| 9=      | I try to buy food that is grown or produced locally (in the region where I live) | 72%                               | 77%                       |
| 9=      | I choose organic produce when its available                                      | 82%                               | 77%                       |

## Q: What do Social Newbies think?

"After the pandemic, I have a newfound take on how life is very short, so I have become willing to spend more money on wines and other luxury items and spend more quality time at home to enjoy life."

*Social Newbie, female*

Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=1,000)

Green / red: Statistically significantly higher / lower than all Chinese upper-middle income semi-annual imported wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, China, Jan '21(n=1,000), Chinese urban upper-middle class semi-annual imported wine drinkers

Wine Intelligence, consumer interviews (n=14)



# Social Newbies: Motivation for drinking wine

## Wine is a social drink to be consumed at social events

### Why do they drink wine?

- As part of social occasions. Wine is drunk as an accompaniment to out-of-home activities, including dinner or drinks with friends.
- Wine is associated with food and is seen as the go-to accompaniment for a nicer meal at a restaurant. It is viewed as mature and sophisticated, something that makes an occasion a bit more special and ceremonial.
- Choice is often determined by the occasion or group they are with. They will happily go with the group preferences. As a result, they sometimes find it difficult to remember what they have drunk.

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### Q: What do Social Newbies think?

“I feel like having a glass of wine brings out the ceremonial aspect of a holiday, the idea of glass with wine inside clinking away really brings out the holiday spirit at, say, Lunar New Year or Christmas.”

*Social Newbie, female*

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### Q: What do Social Newbies think?

“I usually drink wine when there are ladies, semi-formal dinners with friends. Because wine displays my taste better than Chinese spirits and showing my politeness to the ladies.”

*Social Newbie, male*

Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)  
Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers  
Wine Intelligence, consumer interviews (n=14)

# Social Newbies: Wine engagement

## Infrequent drinkers with low knowledge but open to new options

### How do they engage with wine?

- Wine drinking is a relatively new addition to their lives. They are still learning how to navigate what they like and what works for them, as they are in other alcohol categories.
- They don't actively seek out knowledge of the wine category, as they are still trying to find out which alcoholic drinks fit their tastes. Wine is just a drink they go for on social occasions.
- They are infrequent drinkers with lower spend compared to the market average. However, when they do drink wine in the on-trade, they want to make sure it's worth the effort.
- They consider wine a sophisticated choice for occasions like special dinners out.

### What influences their choices?

- Price is important. They don't necessarily want to go for the cheapest wines, but with lack of wine knowledge they don't always see the value in spending more on a bottle.
- Group preferences. They will happily defer decisions to friends or family deemed more knowledgeable.
- Knowledge often comes from older family members who are more invested in the category.

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### Q: What do Social Newbies think?

"I drink wine when socialising with friends. It is a way to display my sophisticated taste."

*Social Newbie, male*

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### Q: What do Social Newbies think?

"I will always pick my friend's recommendation first. Then I will look at pricing. Then, if the prices are the same, I will pick a bottle with a very good wine label and packaging, since I am bringing this bottle to a social gathering, I cannot lose face, and by bringing a nice-looking bottle, it can help with boosting my social status and shows my taste."

*Social Newbie, female*

Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)  
Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers  
Wine Intelligence, consumer interviews (n=14)

# Social Newbies: Alcohol repertoire and wine origins

With little knowledge and experience, Social Newbies are flexible and open to trying new styles of wine

## What do they drink?

- Given their lower category knowledge, they are not giving too much thought or preference to particular places of origin or varietals. It is the atmosphere wine creates that is important to them.
- They have an idea that some countries are better known for wine, but will prioritise other factors like price point when making purchasing decisions.
- They discover new origins, varietals and styles usually through recommendations from family and friends or through social events.
- They have a few varietals they are aware of and will turn to them when they want to be sure they will enjoy a wine, but are also flexible and open to try new things.

## Beverage Repertoire: Top 5

| Ranking |            | Semi-annual drinkers<br>(n=7,294) | Social Newbies<br>(n=2,016) |
|---------|------------|-----------------------------------|-----------------------------|
| 1       | Red wine   | 73%                               | 70%                         |
| 2       | Beer       | 58%                               | 55%                         |
| 3       | White wine | 50%                               | 50%                         |
| 4       | Baijiu     | 37%                               | 37%                         |
| 5       | Whisky     | 39%                               | 34%                         |

## Country of Origin consumption: top 5

| Ranking |           | Semi-annual drinkers<br>(n=7,294) | Social Newbies<br>(n=2,016) |
|---------|-----------|-----------------------------------|-----------------------------|
| 1       | China     | 66%                               | 64%                         |
| 2       | France    | 52%                               | 45%                         |
| 3       | Australia | 27%                               | 22%                         |
| 4       | Italy     | 23%                               | 20%                         |
| 5       | Portugal  | 18%                               | 17%                         |

## Q: What do Social Newbies think?

"I enjoy Chinese spirits, beer and wine. I drink more Chinese spirits at business dinners, more wine with my family and beers with friends."

*Social Newbie, male*

## Q: What do Social Newbies think?

"Other than France I don't know much to be honest. I think anyone can drink wines from this region. For me, it's the idea of drinking with friends and the atmosphere it creates, not where the wine is from."

*Social Newbie, female*

Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)

Green / red: Statistically significantly higher / lower than all Chinese upper-middle income semi-annual imported wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers

Wine Intelligence, consumer interviews (n=14)

# Social Newbies: Where they buy wine

## Trustable channels that offer better deals and ensure wine quality

### Where do they buy wine?

- No particular preference of channels. They opt for any that they find convenient and that offer better deals for good quality wines (e.g. hypermarkets).
- Lack of sufficient knowledge prevents them from buying wine confidently in online channels. When they do, they often buy wines from trustable sources, such as the websites of supermarket / hypermarkets.

### Places you might find them buying wine



### Top 10 wine buying channels

| Ranking |  | Semi-annual drinkers<br>(n=7,294) | Social Newbies<br>(n=2,016) |
|---------|--|-----------------------------------|-----------------------------|
| 1       | Wine shop / shop specialised in alcohol  | 50%                               | 46%                         |
| 2       | From an online retailer                  | 45%                               | 39%                         |
| 3=      | Imported food and drinks stores          | 30%                               | 29%                         |
| 3=      | From a supermarket / hypermarket website | 30%                               | 29%                         |
| 3=      | Department store                         | 30%                               | 29%                         |
| 6=      | Hypermarkets                             | 30%                               | 27%                         |
| 6=      | Boutique supermarkets                    | 30%                               | 27%                         |
| 8       | From a winery's website                  | 26%                               | 24%                         |
| 9=      | Duty free                                | 24%                               | 23%                         |
| 9=      | Directly from broker                     | 24%                               | 23%                         |

### Q: What do Social Newbies think?

"I purchase from importers via my professional friend because I trust my friend's knowledge and recommendation."

*Social Newbie, male*

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### Q: What do Social Newbies think?

"Supermarkets, hypermarkets or wine stores, like Walmart or BHD: I like that they separate wines into different regions and there's always more information provided on shelves."

*Social Newbie, female*

# Social Newbies: How do they shop for wine?

## Price-driven, base decisions on recommendations and familiarity

### How do they shop in the off-trade?

- As young professionals with limited experience of the category, they rely on recommendations through friends and family, sometimes also from influencers on social media.
- Social Newbies explore the category within their budget. Though they do find wine to be an expensive drink and are highly price-driven, they are willing to pay a bit more to ensure the wine-drinking experience is worthwhile.
- Familiarity of varietals, places of origin and brands are important cues.
- Classic labels indicating quality or visually-appealing labels are go-to choices for them as they provide signals about their personal taste to friends.

### Q: What do Social Newbies think?

"I like my labels to look like they are of quality wine, like with castles or with gold lines and detailed designs, or with little pictures that express regional characteristics. Then the taste is important, but then again, I think if everyone's happily enjoying the wine, then I'm happy."

*Social Newbie, female*

### Choice cues in the off-trade

| Ranking |   | Semi-annual drinkers<br>(n=7,294) | Social Newbies<br>(n=2,016) |
|---------|---|-----------------------------------|-----------------------------|
| 1=      | Grape variety                                 | 42%                               | 41%                         |
| 1=      | Words describing the flavour of the wine      | 42%                               | 41%                         |
| 3=      | Quality indicators                            | 40%                               | 38%                         |
| 3=      | The country of origin                         | 38%                               | 38%                         |
| 5=      | A brand I am aware of                         | 36%                               | 37%                         |
| 5=      | The region of origin                          | 38%                               | 37%                         |
| 7       | Vintage                                       | 37%                               | 35%                         |
| 8       | Recommendation by friend or family            | 29%                               | 32%                         |
| 9       | Recommendations from wine critic or writer    | 28%                               | 29%                         |
| 10      | Opportunity to taste the wine before purchase | 27%                               | 27%                         |

### Q: What do Social Newbies think?

"I would look at flavours, price and origin. The most important factor is flavour."

*Social Newbie, female*

Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)

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Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers

Wine Intelligence, consumer interviews (n=14)

# Social Newbies: What brands do they buy?

Little knowledge of brands but they are open to trying out any brands they encounter

## What brands do they buy?

- Social Newbies find it difficult to recall what they have drunk before, possibly because they take whatever is being offered at social events.
- They are, however, quite open to new brands as long as the price point is affordable. Domestic brands are often considered due to their lower price points and availability.
- Visually appealing labels with the right flavour descriptions on the back label will help Social Newbies to have better recall of brands.

## Brands you might find them drinking



## Wine choices of Social Newbies



## Q: What do Social Newbies think?

"Brand doesn't influence my purchase decision at all, because I don't know much about brand and I don't care as long as it tastes good. I like to try new brands and not restrict myself."

*Social Newbie, male*

Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)  
Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers  
Wine Intelligence, consumer interviews (n=14)

# Social Newbies: How do they engage in the on-trade?

## Wine is associated with meals or more formal occasions

### Wine in the on-trade

- Infrequent drinkers and medium spenders in the on-trade, probably because wines are pricier in the on-trade.
- When they do drink wine, it's often for social events or business and they will make sure it's worthwhile.
- Orders wine based on experience and previous knowledge (e.g. familiar styles, origins they have tried before).

### Choice cues in the on-trade

| Ranking |  | Semi-annual drinkers<br>(n=7,294) | Social Newbies<br>(n=2,016) |
|---------|--|-----------------------------------|-----------------------------|
| 1       | Where the wine comes from in the menu                | 36%                               | 36%                         |
| 2       | Wine style (eg red wine, white wine, sparkling wine) | 38%                               | 35%                         |
| 3       | Brand that I know                                    | 32%                               | 30%                         |
| 4       | Grape varieties                                      | 29%                               | 28%                         |
| 5=      | Food matching  | 25%                               | 25%                         |
| 5=      | Vintage  | 27%                               | 25%                         |
| 7       | A description of how the wine tastes in the menu     | 23%                               | 24%                         |
| 8=      | Price  | 21%                               | 21%                         |
| 8=      | Recommendation from those who dine with me           | 20%                               | 21%                         |
| 10      | Pictures of wines in the menu                        | 16%                               | 19%                         |

### Q: What do Social Newbies think?

"I would open a bottle, but it depends on the price. I would usually aim for around RMB 500-600. But if I am out with my other half or with business partners with whom I am seeking to build a relationship, then I am more willing to spend more."

*Social Newbie, female*

### Q: What do Social Newbies think?

"I don't usually drink wine in restaurants because it is often too expensive. If I do need to drink then I bring my own bottles."

*Social Newbie, male*

Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)

Green / red: Statistically significantly higher / lower than all Chinese upper-middle income semi-annual imported wine drinkers at a 95% confidence level  
Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers Wine Intelligence, consumer interviews (n=14)

# Social Newbies: Alternative wines

## Low awareness of alternative wines except for organics

### What do they think about alternative wines?

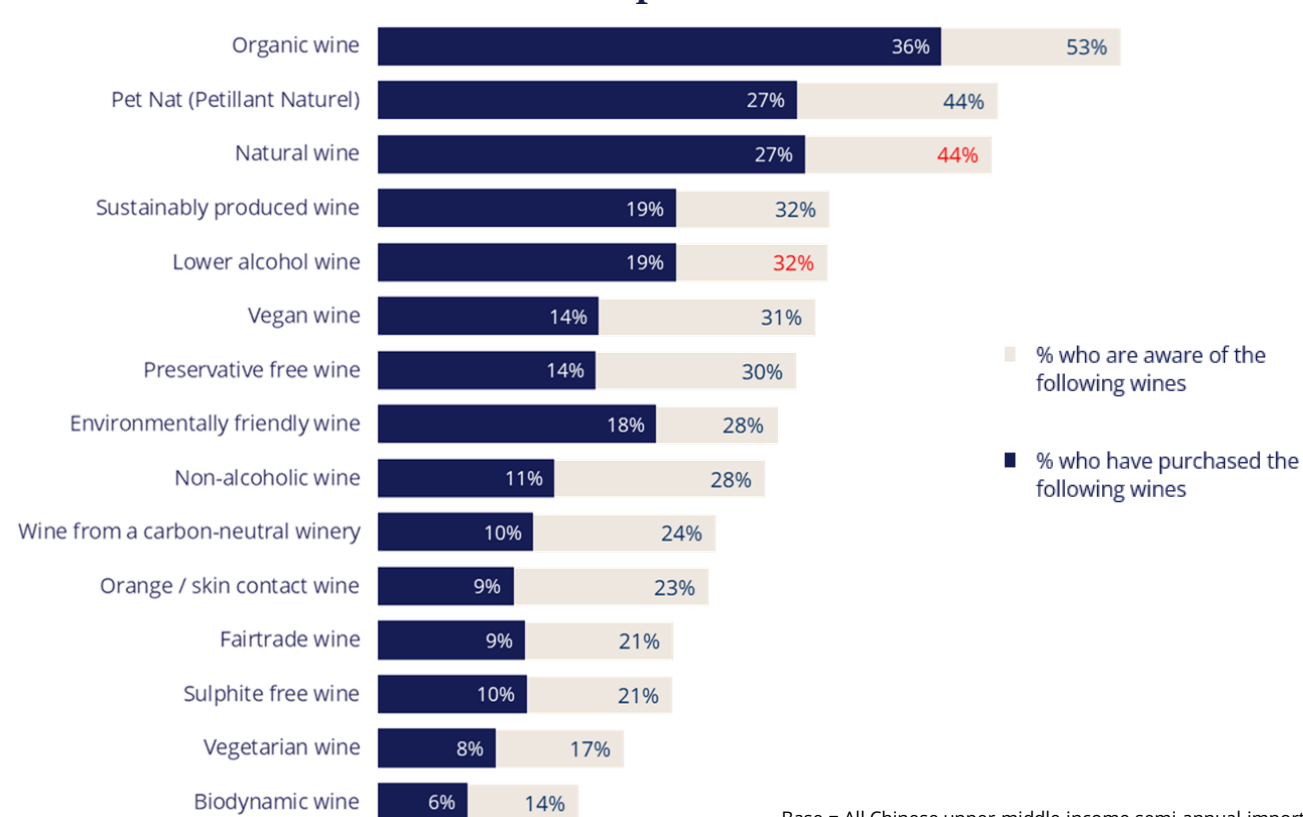
- Consistent with their attitudes and values, the segment has better awareness and purchase levels of organic wine compared with all Chinese wine consumers.
- Other than organic wines, the segment has generally low awareness and purchase rates of alternative wines.
- Being fairly new to the wine category, they are less prone to conventional conceptions of how a wine should taste. Hence, they are open to try alternative wines if clear information is provided.

### Q: What do Social Newbies think?

"I heard of organic wines / biodynamic wines but have not tried them before. I think it's because of unfamiliarity. If there's a section in the supermarket with clear signage and proper explanation for me to understand why this type of wine is special, then I could give it a go."

*Social Newbie, female*

### Awareness and purchase of alternative wines



Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=1,000)

Green / red: Statistically significantly higher / lower than all Chinese upper-middle income semi-annual imported wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, China, Oct '21 (n=1,000), Chinese urban upper-middle class semi-annual imported wine drinkers

Wine Intelligence, consumer interviews



# Social Newbies: Sandy

**Originally from Hebei, Sandy is a 26-year-old working in the overseas student accommodation rental sector. She has worked in Beijing for over four years.**



## How does wine fit into your life?

For me, opening a bottle of wine feels very ceremonial and special. It is not something we will drink every day, unlike beer. To be fair I only started drinking wine just less than four years ago, but I guess the impression I have always had with wine is that it is a symbol of culture and taste, slightly unreachable. Therefore, that is why I and my friends will always have a bottle of wine as a ceremonial gesture, during holidays like Christmas or New Year's Eve, as a way to make the occasion stand out from other days where we would have a regular gathering.

I used to live in a smaller apartment, and since the lockdown was lifted, obviously my income increased, and I was able to afford a bigger apartment. Since then, I was more willing to invite friends over and we started to have more wine during these house gatherings. Also with the pandemic, I had a newfound outlook on life: it is unpredictable and short, so why not enjoy things? I started to be bolder with my finances, and buy more luxury items, which means I am more willing to spend more money on wine, a special item that I did not dare to buy too much of before.

However, despite having bought and drank more wine, I can honestly say that I know nothing about wine. I think it has to do with the fact I never had the opportunity to know more about it. Not many of my social circle is interested in wine in particular. Everyone drinks different types of alcoholic beverages, but no one studies or excels in wine in particular. I guess in the future, if I have the chance, I would be happy to know more about wine on a more professional level.

## Which wines do you enjoy drinking?

As a wine novice, I know that European countries are where the wine came from, so the safe bet for me would always be picking France, although I guess I have had wine from everywhere but had little memory about them since they all look the same to me. Nevertheless, I'd say that I don't like anything too complicated, so nothing with a flavor that requires time and energy to detect. I can never understand the slight differences, even if someone told me what it should taste like. My palate is perhaps quite indifferent to over-complicated flavors, so I enjoy something sweet and fruity. Recently I have gotten into chocolate flavours.

## How do you choose your wine?

When drinking wine, I would think that the most important thing is to create a good atmosphere. It doesn't matter what region or price of wine we are drinking, a bottle of wine will taste good when everyone is having a good time. Although I can say that I am a little superficial, when it comes to choosing a bottle of wine to bring to a social gathering, I want my friends to think I have good taste, so I will choose a bottle of wine that looks good. I'd usually go for really classic label designs, with things like a castle or with gold lines. This is even more so if I am bringing a bottle of wine to a business gathering, to show I am a good candidate to work with. In general, I will say I trust the recommendation of my friends very much since I am not confident in my ability to choose a bottle of wine, so if they recommended it, by telling them what food I am having tonight and what my budget is, I will buy whatever they have recommended. Although I will sometimes use social media platforms like Xiaohongshu to help with choosing a bottle of wine, or ask shop staff, I still believe personal recommendations from friends to be the most important decision-making factor.

# **Frugal Occasionals**

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# Frugal Occasionals

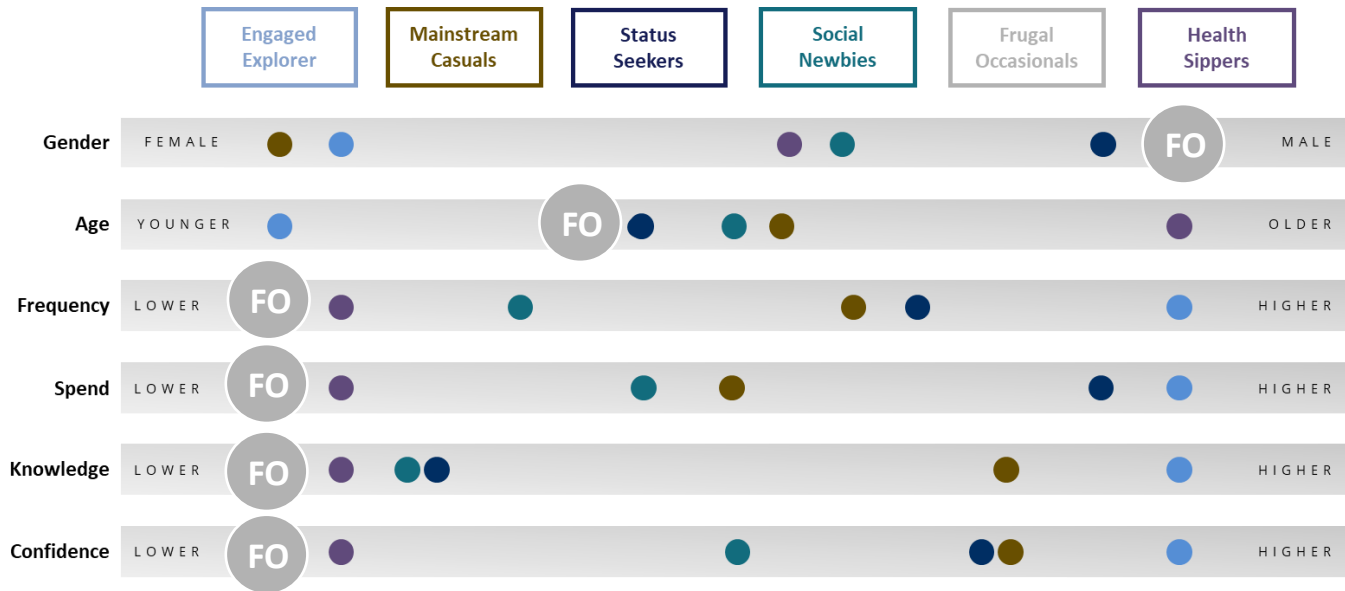


## Who are the Frugal Occasionals

- Male, medium income, young wine drinkers with little interest in wine.

## Relationship with wine

- **Infrequent drinkers** in both off-and on-trade.
- **Low Involvement:** Limited knowledge and low confidence.
- They see wine as a luxurious, social drink for social or business purposes.
- Value-oriented.
- Limited repertoire. Stick to what they know as long as price is right.



## Where you might find them buying

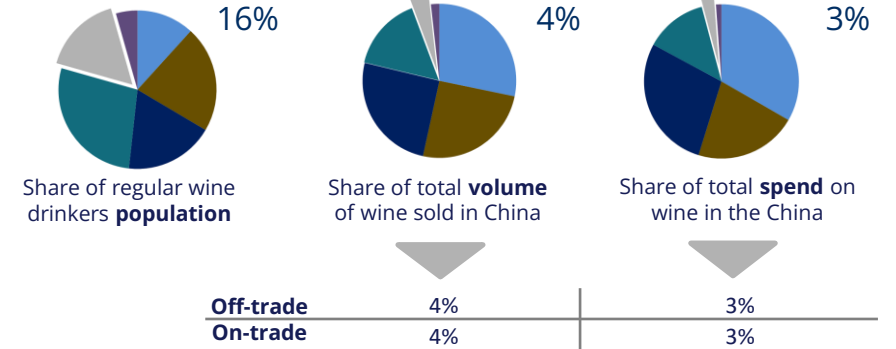


## What you might find them drinking

# Frugal Occasionals: Proportion of wine drinkers, volumes and spend on wine

Frugal Occasionals are one of the least frequent wine drinking consumers.

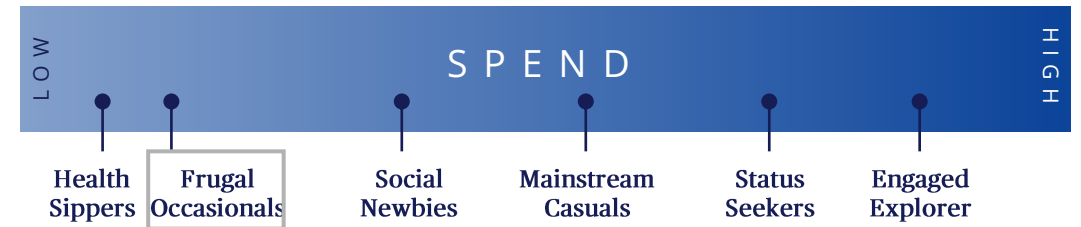
They are **low spenders in both** on-and off-trade and they account for one of the **lowest overall volume and value shares of any group** in the Chinese market. They are the **least involved segment** with little knowledge and confidence in the wine category.



## Wine consumption frequency (off-trade)



## Wine spend (off-trade)



## Wine consumption frequency (on-trade)



## Wine spend (on-trade)



Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)  
 Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers

# Frugal Occasionals: 2019 to 2021

**They remain the least frequent, value-driven drinkers who consume wine for social and work occasions**

## What's the same

- They remain the least frequent drinkers of wine and other alcoholic beverages.
- Have little knowledge and confidence in wine.
- Value-driven.
- Drink wine for special occasions or business events only.

## What's different

- More drinkers are male, older and coming from Tier 3 regions.
- Despite being one of the least knowledgeable and confident drinkers in wine, they know a bit more about wine than they did in 2019 and are found to be drinking significantly more of several varietals and origins, albeit from a small base.
- Similar to most other segments, they are spending significantly more than they were before.

Source: Wine Intelligence, Vinitrac®, China, Mar '18, Jul '18, Oct '18, Jan '19 & Mar '19, (n=9,000) Chinese urban upper-middle class semi-annual imported wine drinkers  
Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers

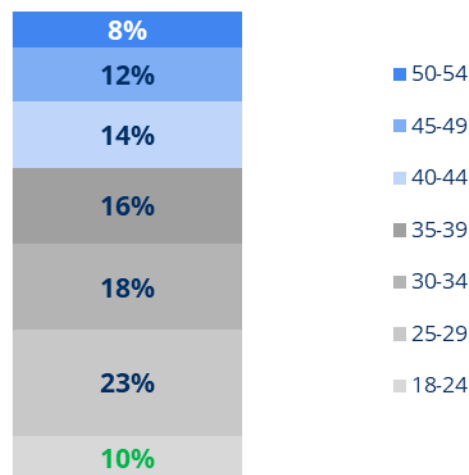
# Frugal Occasionals: Who are they?

## Second youngest, medium-income male drinkers with little involvement in the wine category

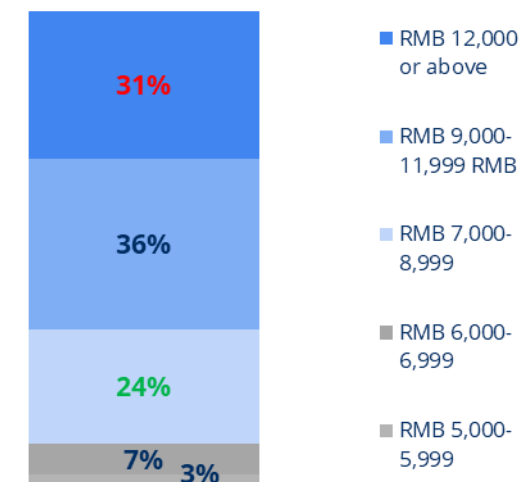
### Who are Frugal Occasionals?

- More likely to be male.
- The second youngest segment.
- Come from the middle income group, most likely because they have just started their career.
- Less likely to be married than average wine drinkers (72% vs 62%).
- Similar geographic distribution when compared with all Chinese regular wine drinkers, the majority living in the large Tier 1 cities, with some from the central and western regions.
- They have little knowledge of the category and are not confident consumers.

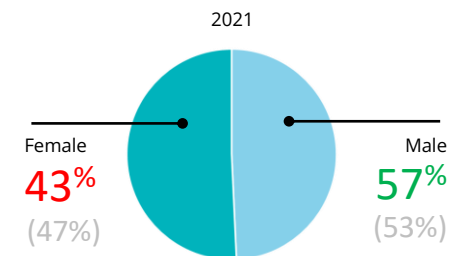
### Age



### Income



### Gender



(%)=All Chinese upper-middle income semi-annual imported wine drinkers

Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)

Green / red: Statistically significantly higher / lower than all Chinese upper-middle income semi-annual imported wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers

# Frugal Occasionals: Engagement and repertoire

Wine is a luxurious social drink which they are not keen to be more engaged in; narrow repertoire

## How do they engage in wine?

- Frugal Occasionals aren't into alcohol beverages. When they do drink, it is often for social or business occasions. The same applies to the wine category.
- They see wine more as a luxurious "social drink" and a drink where they are not very fond of the taste. Wine is not integral part of their life, and they are not keen to become more involved in this category.
- They tend to stick to what know and drink from limited origins, varietals and brand repertoires.

## Beverage Repertoire: Top 5

| Ranking |            | Semi-annual drinkers<br>(n=7,294) | Frugal Occasionals<br>(n=1,182) |
|---------|------------|-----------------------------------|---------------------------------|
| 1       | Red wine   | 73%                               | 67%                             |
| 2       | Beer       | 58%                               | 58%                             |
| 3       | White wine | 50%                               | 38%                             |
| 4       | Baijiu     | 37%                               | 35%                             |
| 5       | Champagne  | 37%                               | 31%                             |

## Brands you might find them drinking



## Country of Origin consumption: top 5

| Ranking |           | Semi-annual drinkers<br>(n=7,294) | Frugal Occasionals<br>(n=1,182) |
|---------|-----------|-----------------------------------|---------------------------------|
| 1       | China     | 66%                               | 61%                             |
| 2       | France    | 52%                               | 40%                             |
| 3       | Australia | 27%                               | 16%                             |
| 4=      | Italy     | 23%                               | 15%                             |
| 4=      | Chile     | 18%                               | 15%                             |

Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)

Green / red: Statistically significantly higher / lower than all Chinese upper-middle income semi-annual imported wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers

# Frugal Occasionals: How do they shop for wine?

## Price-driven, infrequent drinkers with low-to-medium spend in both off-and on-trade

### How do they shop in the off-trade?

- They are infrequent drinkers and low-to-medium spenders in the off-trade. Their typical spend is less below 300RMB per bottle, slightly more than 2019.
- The segment is very price-driven. A bottle of wine on promotion is what they look at when they do shop for wines.
- Online retailers is the most used channel, as it often offers good deals, though they do express concerns over wine quality bought online.

### Choice cues in the off-trade

| Ranking |   | Semi-annual drinkers<br>(n=7,294) | Frugal Occasionals<br>(n=1,182) |
|---------|---|-----------------------------------|---------------------------------|
| 1       | Words describing the flavour of the wine      | 42%                               | 42%                             |
| 2       | Grape variety                                 | 42%                               | 38%                             |
| 3=      | A brand I am aware of                         | 36%                               | 37%                             |
| 3=      | The region of origin                          | 38%                               | 37%                             |
| 3=      | Quality indicators                            | 40%                               | 37%                             |
| 6=      | The country of origin                         | 38%                               | 35%                             |
| 6=      | Recommendation by friend or family            | 29%                               | 35%                             |
| 8       | Vintage                                       | 37%                               | 34%                             |
| 9       | Opportunity to taste the wine before purchase | 27%                               | 29%                             |
| 10      | Promotional offer                             | 22%                               | 28%                             |

### Wine in the on-trade

- Frugal Occasionals are infrequent drinkers in the on-trade. When they do drink, it is most likely to be for celebrations or business lunch / dinner.
- Similar to the off-trade, they are quite price driven and typically spends about 300RMB on a bottle, again slightly more than 2019.

### Places you might find them buying wine in the off-trade



Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)

Green / red: Statistically significantly higher / lower than all Chinese upper-middle income semi-annual imported wine drinkers at a 95% confidence level  
Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers



# Health Sippers

China Portraits  
2022

# Health Sippers

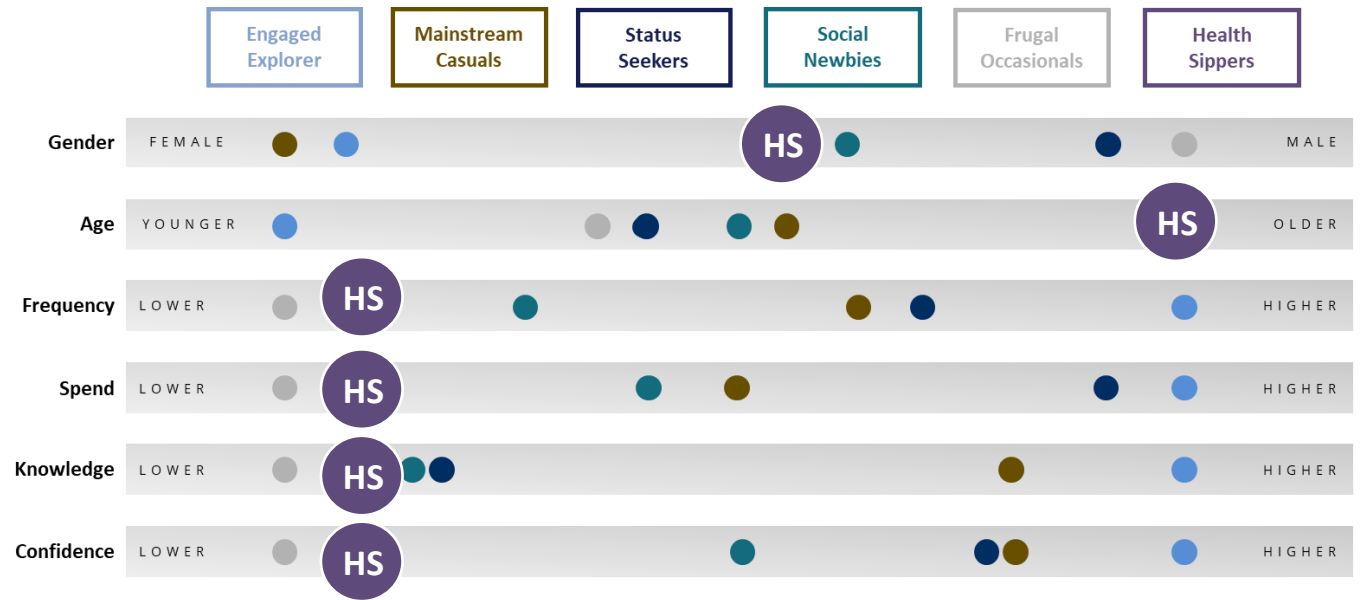


## Who are the Health Sippers?

- Male, low-to-medium income, older wine drinkers who drink occasionally. About a quarter of them live in Shanghai.

## Relationship with wine

- **Healthy drinkers.** Wine, particularly red wine, is seen as a relaxing, healthy alcoholic drink at the end of the day.
- **Fairly knowledgeable, experienced drinkers.** They have good awareness of brands, varietals and origins that are often seen in the mainstream channels.
- **Occasional drinker in the off-trade.** Wine is a drink they like to enjoy alone at home.
- **Rarely drink in the on-trade.** When they do drink in restaurants it is very often for business purposes.
- **Value-oriented,** lowest spending segment. Often looks for wine on promotion from online retailers.



## Where you might find them buying

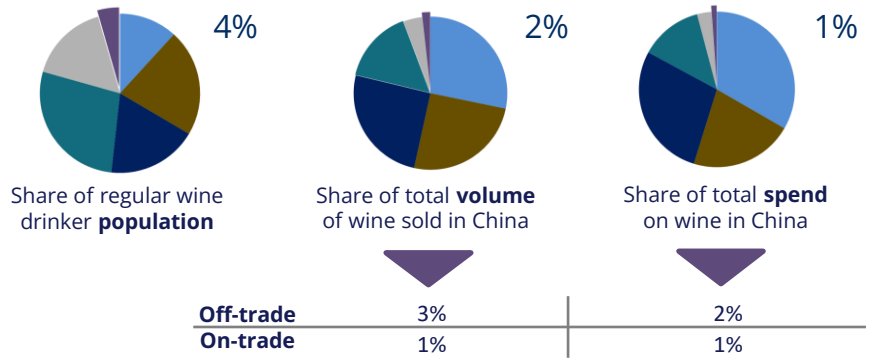


## What you might find them drinking



# Health Sippers: Proportion of wine drinkers, volumes and spend on wine

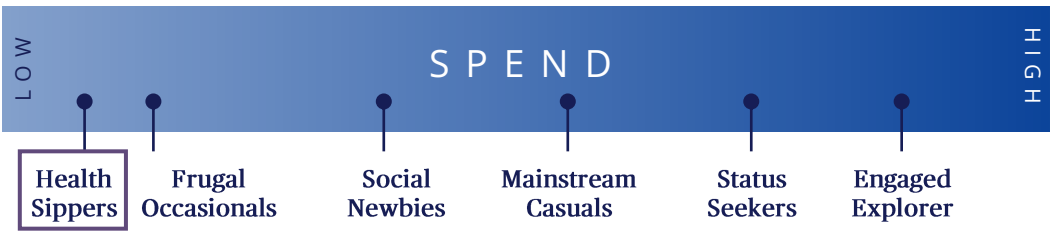
Health Sippers is the smallest segment. They are the **least frequent drinkers in the on-trade**. They account for the **lowest proportions of both volume and value** in the Chinese wine market.



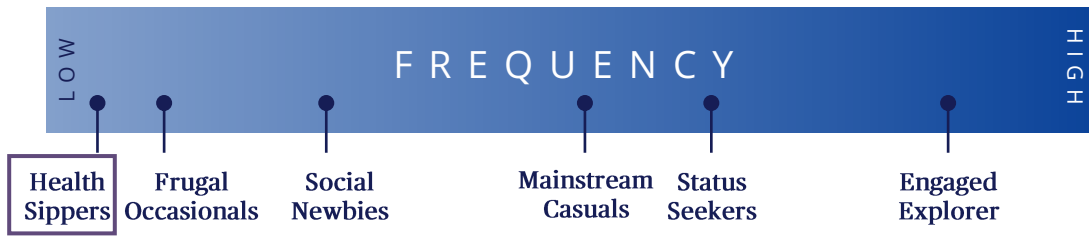
## Wine consumption frequency (off-trade)



## Wine spend (off-trade)



## Wine consumption frequency (on-trade)



## Wine spend (on-trade)



Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)  
 Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers

# Health Sippers: 2019 to 2021

Still the oldest segment, favouring red wine and the on-trade; drinking more for pleasure

## What's the same

- Similar gender and geographical distribution to 2019.
- They remain the oldest segment.
- Red wine remains the most dominant drink in their alcohol repertoire.
- Remains almost an off-trade drinker only. They rarely drink in the on-trade.
- Similar level of knowledge and confidence to 2019.

## What's different

- More drinkers are coming from higher income groups, possibly due to career advancement in recent years.
- Spending slightly more than before and less likely to buy wine below RMB 100.
- Drinking more for pleasure, and not necessarily for health purposes.

Source: Wine Intelligence, Vinitrac®, China, Mar '18, Jul '18, Oct '18, Jan '19 & Mar '19, (n=9,000) Chinese urban upper-middle class semi-annual imported wine drinkers  
Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers

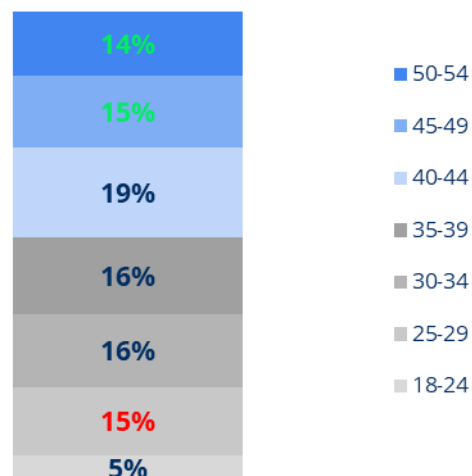
# Health Sippers: Who are they?

**Oldest, male-dominant, low-to-medium segment with significantly more from Shanghai area**

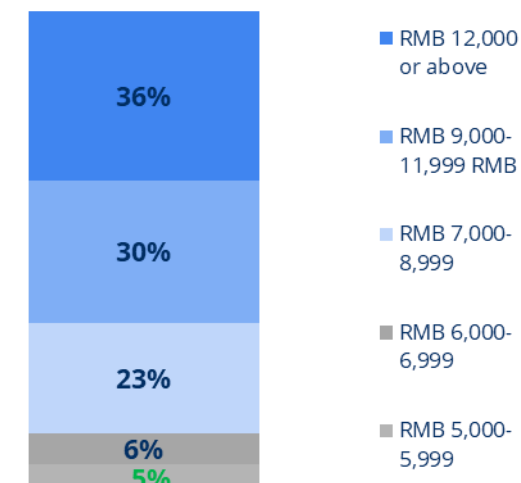
## Who are Health Sippers?

- Similar gender distribution as general Chinese wine drinkers – slightly more male drinkers
- The oldest segment, with over 50% above 35 years old and significantly higher proportions of 45+ above
- Low-to-medium income
- Most are married, living with partner and tends to live with their older parents (13% vs 6%)
- Significantly more consumers reside in Shanghai city (25% vs 18%)
- They have fair knowledge of wine and good awareness of the mainstream origins and varietals

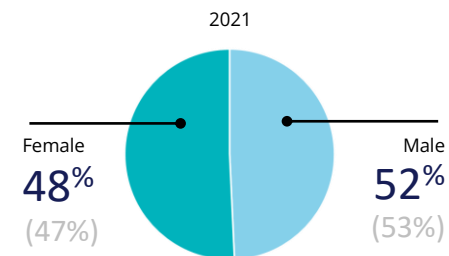
## Age



## Income



## Gender



(%)=All Chinese upper-middle income semi-annual imported wine drinkers

Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)

Green / red: Statistically significantly higher / lower than all Chinese upper-middle income semi-annual imported wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers

# Health Sippers: Engagement and repertoire

## Wine is a healthy, relaxing treat at the end of the day at home

### How do they engage in wine and what do they drink?

- Health Sippers mostly buy wine in the off-trade for a relaxing, healthy treat.
- They are predominantly red wine drinkers as it is considered to be a “healthy” drink.
- They have a fair knowledge of wine, knowing most of the mainstream origins, varietals and brands.
- They drink wine from any origins or brands they can find in the mainstream channels (e.g. Chinese wines, Bordeaux wines, Changyu).
- Unlike other segments, Health Sippers are more open to drinking wine made locally.

### Beverage Repertoire: Top 5

| Ranking |            | Semi-annual drinkers<br>(n=7,294) | Health Sippers<br>(n=322) |
|---------|------------|-----------------------------------|---------------------------|
| 1       | Red wine   | 73%                               | 91%                       |
| 2       | Beer       | 58%                               | 72%                       |
| 3       | Baijiu     | 37%                               | 33%                       |
| 4       | White wine | 50%                               | 31%                       |
| 5       | Whisky     | 39%                               | 25%                       |

### Country of Origin consumption: top 5

| Ranking |                  | Semi-annual drinkers<br>(n=7,294) | Health Sippers<br>(n=322) |
|---------|------------------|-----------------------------------|---------------------------|
| 1       | China            | 66%                               | 76%                       |
| 2       | France           | 52%                               | 56%                       |
| 3       | Australia        | 27%                               | 24%                       |
| 4       | Chile            | 18%                               | 15%                       |
| 5       | California - USA | 17%                               | 13%                       |

### Brands you might find them drinking



### Brands they have a high affinity with



Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)

Green / red: Statistically significantly higher / lower than all Chinese upper-middle income semi-annual imported wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers

# Health Sippers: How do they shop for wine?

## Price-driven, low-spending consumers who mostly shop online

### How do they shop in the off-trade?

- Health Sippers are occasional drinkers in the off-trade, often drinking to relax at home.
- They primarily buy wine from the internet where they can find promotions.
- They are the lowest spending segment, typically spending below RMB 150 per bottle, similar to 2019.
- Familiar varietals, origins and brand are key drivers of purchase.

### Choice cues in the off-trade

| Ranking |  | Semi-annual drinkers<br>(n=7,294) | Health Sippers<br>(n=322) |
|---------|--|-----------------------------------|---------------------------|
| 1       | A brand I am aware of                    | 36%                               | 51%                       |
| 2=      | Grape variety                            | 42%                               | 45%                       |
| 2=      | The country of origin                    | 38%                               | 45%                       |
| 4       | The region of origin                     | 38%                               | 43%                       |
| 5       | Words describing the flavour of the wine | 42%                               | 42%                       |
| 6       | Vintage                                  | 37%                               | 39%                       |
| 7       | Quality indicators                       | 40%                               | 36%                       |
| 8       | Recommendation by friend or family       | 29%                               | 33%                       |
| 9       | Promotional offer                        | 22%                               | 32%                       |
| 10      | Back label information                   | 26%                               | 29%                       |

### Wine in the on-trade

- Health Sippers are the least frequent drinkers in the on-trade
- They are also the lowest-spending segment. When they do drink, it is often for business, and they would look for the most affordable option they can find on the menu.
- Their typical spend is below RMB 150.
- Familiar brand is another key prompt when ordering wine

### Places you might find them buying wine in the off-trade



Base = All Chinese upper-middle income semi-annual imported wine drinkers (n=7,294)

Green / red: Statistically significantly higher / lower than all Chinese upper-middle income semi-annual imported wine drinkers at a 95% confidence level  
Source: Wine Intelligence, Vinitrac®, China, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers

# **Methodology**

**China Portraits**  
2022



# Research methodology

## QUANTITATIVE

The data for this report was collected in China in January 2021, March 2021, and October 2021

A total of 7,294 responses were collected

Data was gathered via Wine Intelligence's Vinitrac® China online survey

Respondents were screened to ensure that met the following criteria:

They were 18-54 years old

Urban upper-middle class: personal monthly income before tax of at least 6,000 RMB in Beijing, Guangzhou, Shanghai, Hangzhou and Shenzhen; or at least 5,000 RMB in Wuhan, Chengdu, Shenyang, Chongqing, Changsha, Zhengzhou and Guiyang

Residents of Beijing, Guangzhou, Shanghai, Wuhan, Chengdu, Shenyang, Hangzhou, Shenzhen, Chongqing, Changsha, Zhengzhou and Guiyang

Drank imported grape-based wine at least twice a year

Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis

The data is representative of Chinese urban upper-middle class semi-annual imported wine drinkers in terms of gender, age and region

The distribution of the sample is shown in the table:

| January to October 2021                    |                             |             |
|--|-----------------------------|-------------|
|  |                             | n= 7294     |
| <b>Gender</b>                              | Male                        | 53%         |
|  | Female                      | 47%         |
|  | <b>Total</b>                | <b>100%</b> |
| <b>Age</b>                                 | 18-24                       | 7%          |
|  | 25-29                       | 24%         |
|  | 30-34                       | 18%         |
|  | 35-39                       | 15%         |
|  | 40-44                       | 16%         |
|  | 45-49                       | 10%         |
|  | 50-54                       | 9%          |
|  | <b>Total</b>                | <b>100%</b> |
| <b>City</b>                                | Shanghai, Hangzhou          | 25%         |
|  | Beijing                     | 17%         |
|  | Shenyang, Zhengzhou         | 9%          |
|  | Guangzhou, Shenzhen         | 19%         |
|  | Changsha, Wuhan             | 7%          |
|  | Chengdu, Guiyang            | 12%         |
|  | Chongqing                   | 11%         |
|  | <b>Total</b>                | <b>100%</b> |
| <b>Personal monthly income before tax</b>  | Less than 9,000 RMB         | 27%         |
|  | 9,000-11,999 RMB            | 34%         |
|  | 12,000+ RMB                 | 39%         |
|  | <b>Total</b>                | <b>100%</b> |
| <b>Imported wine consumption frequency</b> | 2-5 times per year          | 15%         |
|  | About once every two months | 24%         |
|  | 1-3 times per month         | 38%         |
|  | Once a week or more often   | 23%         |
|  | <b>Total</b>                | <b>100%</b> |

Source: Wine Intelligence, Vinitrac®, Jan '21, Mar'21, Oct '21 (n=7,294), Chinese urban upper-middle class semi-annual imported wine drinkers

# Research methodology

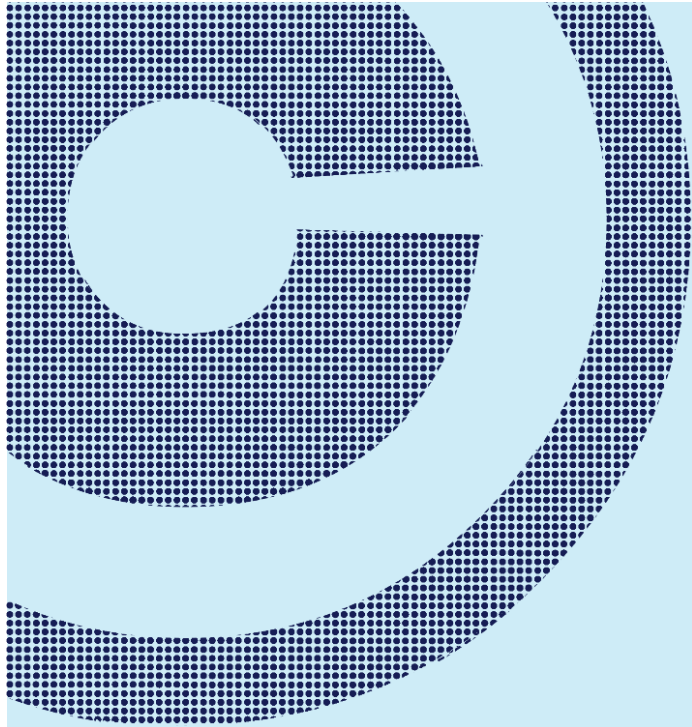
## QUALITATIVE

Consumer Interviews were conducted with consumers located across China in March 2022

The interviews lasted between 30 and 45 minutes and were done via phone or WeChat, covering general wine drinking and buying behaviours and preferences, motivations and attitudes towards wine and purchase choice cues

Sample size n = 14

| Segment            | n         |
|--------------------|-----------|
| Engaged Explorers  | 3         |
| Mainstream Casuals | 5         |
| Status Seekers     | 3         |
| Social Newbies     | 3         |
| <b>Total</b>       | <b>14</b> |



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