Understanding Chinese sensory preferences for varied wine styles and the language used to describe them

Wine Intelligence for University of South Australia

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Headline findings from this research (1/2)

1. Wine is primarily described by consumers in 3 main ways:
    1. Broad terms denoting taste appeal, including “good”, “good taste”, and wide variety of terms meaning “smooth” (顺滑，柔顺，润滑，滑口，爽滑)
    2. 4 primary characteristics are used to describe the overall taste → sweetness, acidity, fruitiness, astringency
    3. Variety of more specific terms depending on specific style of wine, including “long finish”, “pure”, “mellow”

2. Flavour descriptors are limited to commonly eaten fruits
    - Specific flavours were very rarely mentioned unprompted
    - Of the prompted flavours tested:
        - For whites / sparkling, citrus fruits work best, such as pomelo and lime
        - For reds, dried red fruits work best, such as yangmei and dried Chinese hawthorns; vegetables are not seen as appropriate descriptors



Headline findings from this research (2/2)

3. Preferred wine style: red and sweet wines
   - Reds are consistently liked, whilst sweets are more polarising - Moscato and Tawny are strongly liked, whilst the other two sweet wines, Botrytis Semillon and Muscat, have lower appeal
   - Guangzhou respondents prefer sweet wines to reds, and more so than any other city
   - Red wines seen to have a broader occasion suitability than sweet

4. Preferred wines overall: Moscato with mean appeal score of 7.1 out of 9
   - …followed by Grenache (Barossa) (6.8); Tawny (6.6); and Shiraz (6.5)

5. Associations with Australian wine limited to broader New World associations
   - Therefore seen as delivering a fruiter style than French wines, with acceptable but not top-end quality

Potential hypotheses to test in the next stage of this research project

1. *Consumers find it helpful to assess and learn about wine by referencing the 4 characteristics identified in these groups: sweetness, acidity, astringency and fruitiness*

2. *A balance of the 4 characteristics is sought in a "good wine"*

3. *Consumers can recognise a number of secondary characteristics within different styles of wine, including smoothness, long aftertaste, tannins, mellowness, and purity*

4. *Fruit flavour descriptors are the most easily relatable words for describing the taste of the wine - these flavours can include fruits that are known both internationally as well as China-specific fruit flavours, e.g. lemon as well pomelo*

5. *The more a wine is liked, the broader the perceived occasion suitability*

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Research objectives:
Describing wine taste in China

Main Objective:

Identify the language and the lexicon that Chinese consumers use to describe taste elements of wine

Secondary Objectives:

Assess other elements of the wines:

- Acceptance and likeability of different wine styles
- Food matching suitability
- Consumption occasions
- Price points

Research plan:
12 groups across 3 key cities



12 focus groups across: Shanghai (16th March 2013), Chengdu (20th March) and Guangzhou (22nd March).

- 4 x 1hr groups in each of the 3 cities
  1. 1 x younger (25-30) female group
  2. 1 x older (31-50) female group
  3. 1 x younger (25-30) male group
  4. 1 x older (31-50) male group

Wines tested:

16 wines divided into 4 sets, with 4 wine styles in each set tested across 4 groups in each of 3 cities

Wine	Set 1	Set 2	Set 3	Set 4
1. Sparkling S	Coonawarra Sparkling Shiraz (nv)	North-East Victoria Zibibbo Rosè (nv)	Australia Moscato Sparkling (nv)	South Australia Chardonnay Pinot Noir (nv)
2. White R	Margaret River Chardonnay 2011	King Valley Pinot Gris 2011	Claire Valley Riesling 2012	Adelaide Hills Sauvignon Blanc 2012
3. Red Q	Mornington Peninsula Pinot Noir 2011	Barossa Valley Grenache 2010	Barossa Valley Shiraz 2010	Margaret River Cabernet/Merlot 2010
4. Sweet M	King Valley Moscato 2012	Riverina Botrytis Semillon 2008	South Australia Tawny (nv)	Rutherglen Brown Muscat (nv)

- Wines served blind, in order of S to M

Order of sets in each city			
	Shanghai	Chengdu	Guangzhou
Group 1	Set 1	Set 4	Set 3
Group 2	Set 2	Set 1	Set 4
Group 3	Set 3	Set 2	Set 1
Group 4	Set 4	Set 3	Set 2

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Research plan:
Respondent profile

- All respondents were required to:
  - Have bought and drunk imported wine in the off-trade at least once a month in the past 6 months
  - Have drunk imported wine in the on-trade at least 3 times in the past 6 months
  - Typically spend on wine (retail) at RMB 150-400
  - Not buy wine predominately for gifting
  - Be open to wines from Australia
  - Be open to trying new and different styles of wine

- Smaller focus groups were run with 4 people in each group to allow in-depth exploration of wine flavour descriptions within the 1 hour groups

China		
Sample size		*48*
Gender	Male	24
	Female	24
Age	30 and below	24
	30+	24
City	Shanghai	16
	Guangzhou	16
	Chengdu	16

Source: Wine Intelligence focus groups, Mar 2013, n=48 Chinese regular wine drinkers in Shanghai, Guangzhou, Chengdu

City context:
1. Shanghai 上海

Food / flavours culture:

- Local cuisine characterised by use of alcohol in cooking, use of salted meats and preserved vegetables, as well as use of sugar and soy sauce
- One of China's most international cities, with a wide range of cuisines from across China and from across the world widely available
- Large international population and strong presence of Western restaurants and supermarkets contributes to consumer openness and broader exposure to wine than in most other cities in China



Wine culture

- Established market for domestic and imported wine
- Arguably most developed wine market in China, with a large number of wine shops and bars

- Population: ~23 m
- No. of imported wine drinkers: ~8.5 m

Language:

- Local language Shanghainese spoken by local population at home and with friends, however Mandarin is dominant language in all public settings, and communication in Mandarin rarely a challenge



"Delicate" food – Xiefen Tangbao in Shanghai

Source: Wine Intelligence observations and local discussions between and during focus group fieldwork

City context:
2. Guangzhou 广州

Food / flavours culture:

- Dominant local cuisine is Cantonese cuisine, available across China and known for use of ingredients such as sesame oil, oyster sauce, soy sauce, rice wine, spring onion, scallion oil, sugar and salt
- Proximity to Hong Kong and advanced level of economic development contributes to a sophisticated food scene with influences from across China and from international cuisines
- Strong culture of considering health benefits of food

Wine culture

- Wine widely available, with wine market influenced by the strong growth of wine in nearby Hong Kong market
- Strong wine retail and distribution, with wide range of brands available

Language:

- Cantonese spoken by both local population and those coming from other Cantonese-speaking areas of southern China, as well as Hong Kong. Use of Cantonese in Hong Kong also ensures a vibrant media and entertainment industry available in Cantonese.
- Although some level of Mandarin spoken by most in Guangzhou, many feel more comfortable speaking Cantonese



- Population: ~11 m
- No. of imported wine drinkers: ~3.5 m



Various dim sum found across Guangzhou

Source: Wine Intelligence observations and local discussions between and during focus group fieldwork

City context:

3. Chengdu 成都

Food flavours / culture:

- Known for its spicy and flavourful cuisine (e.g. hot pot), especially the “mala” flavour, which uses a combination of heat from chili pepper and a numbing sensation produced by Sichuan pepper
- Sichuanese cuisine referred to as one of China’s “Four Great Cuisines”, popular across China

Culture

- Known in China as a relaxed city. Popular pastime is playing mahjong, a traditional Chinese board game, which can involve hours of sitting around a table with friends, chatting and drinking tea or other beverages
- Strong luxury market, with a reputation for a large amount of money spent on appearance
- A social culture that places greater emphasis on family and friends than on business, and streets that come alive in the evenings

Wine market observations

- Traditionally dominated by baijiu – province is home to some of the most famous baijiu brands in China. Beer also popular, seen as good accompaniment to local spicy cuisine, and cocktails/imported spirits consumed as a part of active nightlife



- Population: ~7 m
- No. of imported wine drinkers: ~2.5 m



Spicy street food common in Chengdu

Source: Wine Intelligence observations and local discussions between and during focus group fieldwork

City context:
Language differences between cities

- In addition to Mandarin (the language these groups were conducted in), a wide range of local languages are spoken across China
  - Mandarin is the main language used for education, media and in professional settings
  - In some regions local population also speak local languages at home and with friends
  - Cantonese, spoken in Southern China and Hong Kong, is arguably the strongest of these regional language, with a vibrant media and music scene in Cantonese
  - Regardless of regional language, all in mainland China use the same written script. This script is a simplified form of the traditional script used in Hong Kong and Taiwan

- Each of the 3 cities included in the study uses a local language in addition to Mandarin
  - In all three cities, respondents appeared to be comfortable interacting in Mandarin
  - Guangzhou respondents switched to Cantonese when speaking amongst themselves between exercises, while Shanghai and Chengdu respondents continued to speak in Mandarin

- Overall terminology used to describe wines across regions appeared to be consistent, with the exception of in Guangzhou where respondents in each of 4 groups asked for help with writing the character “se” (astringent)

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Wine experience generally begins as an alternative to baijiu and beer in business and social occasions

- Alcohol experience in China typically begins with baijiu and/or beer
- Introduction to imported wine typically happens when wine is served either in business or social setting
  - Social occasions often involve single beverage chosen by host for full group
  - Wine seen as more relaxed and less prestigious than baijiu, but more formal than beer
  - Some feel wine is more appropriate than baijiu for women, and may serve wine when women are present
  - Wine also appropriate for specific occasions, e.g. romantic occasions and when dining in Western restaurants
- Introduction to imported wine appears to have happened slightly later in Chengdu than in Guangzhou and Shanghai
  - This may be explained due to Shanghai's exposure to international influences

> I was 18 years old when I drank imported wine for the first time… with my friends and one… treated us
> *Guangzhou, male, 25-30*

> [I first drank wine at a] girls reunion… a couple of years ago. It tasted good
> *Shanghai, female, 25-30*

> We have a wine culture at work… you have to drink to blend in
> *Shanghai, female, 25-30*

> I usually have some business dinners with female clients. I choose wines for them as an alternative to baijiu.
> *Chengdu, male, 31-50*

> [I drink imported wine] when I watch sports games, go to KTV [karaoke]… or for special occasions like Valentines day
> *Shanghai, male, 25-30*

More involved drinkers buy imported wine for a range of formal and informal occasions and to enjoy wine drinking (in the western style of wine drinking)

- Involved drinkers moving to use wine in more everyday settings
  - Respondents showed an evolving relationship with wine that was moving from one driven primarily by social expectations (business occasions and gifting) to include more relaxed drinking and drinking for enjoyment

- "International" wine drinking habits evident throughout cities
  - Most now drink wine unmixed, and slowly rather than bottoms up
  - However, some (mainly men) still tend to drink wine in large "gulps" rather than sipping. This is in line with the way baijiu is consumed – "ganbei" ("bottoms up") style

I drink a lot of imported wine… I drink it at business occasions… with friends, at parties…sometimes wine without food. If I'm thinking about things…
Shanghai, male, 25-30

We [my girlfriends] sometimes go to wine shops to buy wines, as more choices are provided there than in supermarket
Chengdu, female, 25-30

I drink imported wines because they are more tasty than domestic wines. In earlier years when we drank domestic wines, we had to mix it with Sprite to reduce the astringency. Now we never do that, as imported wines are mellow and tasty enough to be enjoyed directly.
Guangzhou, male, 31-50

Imported wine drinking motivations are personal and functional, as well as social

Choice to drink wine more habitually made for a variety of reasons:

- Social
  - ✓ Helps create an intimate and relaxed atmosphere when getting together with friends
  - ✓ Associations with romance, sophistication, culture
  - ✓ Appropriate in certain business occasions to show wealth / “Western” sophistication
- Functional
  - ✓ Lower alcohol alternative to baijiu
  - ✓ Prefer the taste over baijiu
  - ✓ Helps with falling asleep in the evening
  - ✓ Lower prices than before, makes it more accessible
- Personal
  - ✓ Enjoyed for a relaxing moment alone
  - ✓ Seen as good for health and beauty, losing weight etc., especially for women

> When you need to discuss something, drinking red wine is more cultured
> *Guangzhou, female, 31-50*

> We work a lot with Japanese or English so we have to order imported wine
> *Shanghai, male, 31-50*

> [Imported wines] used to be expensive. But now they are quite affordable
> *Shanghai, male, 31-50*

> I drink wine everyday before bed, to help me fall asleep more easily
> *Chengdu, female, 25-30*

> I have a very busy job, so I usually drink wine at home after a stressful, busy day
> *Guangzhou, female, 31-50*

Health reasons are a particularly strong motivation for women to consume wine

- Red wine is believed to be good for circulation, which helps improve skin, protect blood vessels, and also improve sleep quality
- We can identify 3 types of behaviour regarding health motivations:
  1. **"Health switchers":** Those who switch from other alcoholic drinks such as baijiu or beer because it's better for their health, particularly because of the lower alcohol, e.g. men or younger women
  2. **"Medicinal sippers":** Those that didn't drink alcohol before and drink a sip before bed each night to help them fall asleep, e.g. older women
  3. **"Social healthy drinkers":** Those that feel it looks better to be drinking wine because it's seen as healthier, e.g. women socialising
- Health is a particularly dominant motivator in Guangzhou
  - Cantonese culture and cuisine places larger emphasis on eating food that helps maintain health

It's good for women to drink wine for skin and sleep quality.
Guangzhou, female, 31-50

Unlike baijiu, wines have lower alcohol and help protect our blood vessels
Chengdu, female, 31-50

My mum always joins me in drinking red wine. It's good for her health.
Guangzhou, female, 31-50

I didn't used to be that into wine, but… I understood that you can't just rely on cosmetics to stay young
Shanghai, female, 31-50

Imported wines are preferred to domestic wines due to taste and reputation

- Reasons for “switching up” from domestic to imported wine can be a combination of taste preferences as well as imported wine perceived as reflecting better socially

[Imported wine I drink] is **less astringent** than domestic wine
Chengdu, male, 25-30

I drank domestic wines for a couple of years before. But ever since I tasted imported wine, I switched, as it’s obviously **more pure and fruity** than domestic.
Guangzhou, female, 31-50

We (my husband and me) were loyal to Greatwall before, but now we mainly drink imported wine. I believe imported wines taste more **fresh and special**.
Guangzhou, female, 31-50

I choose wines from Bordeaux while treating friends, as Bordeaux is of **high reputation** for producing good wine
Chengdu, male, 31-50

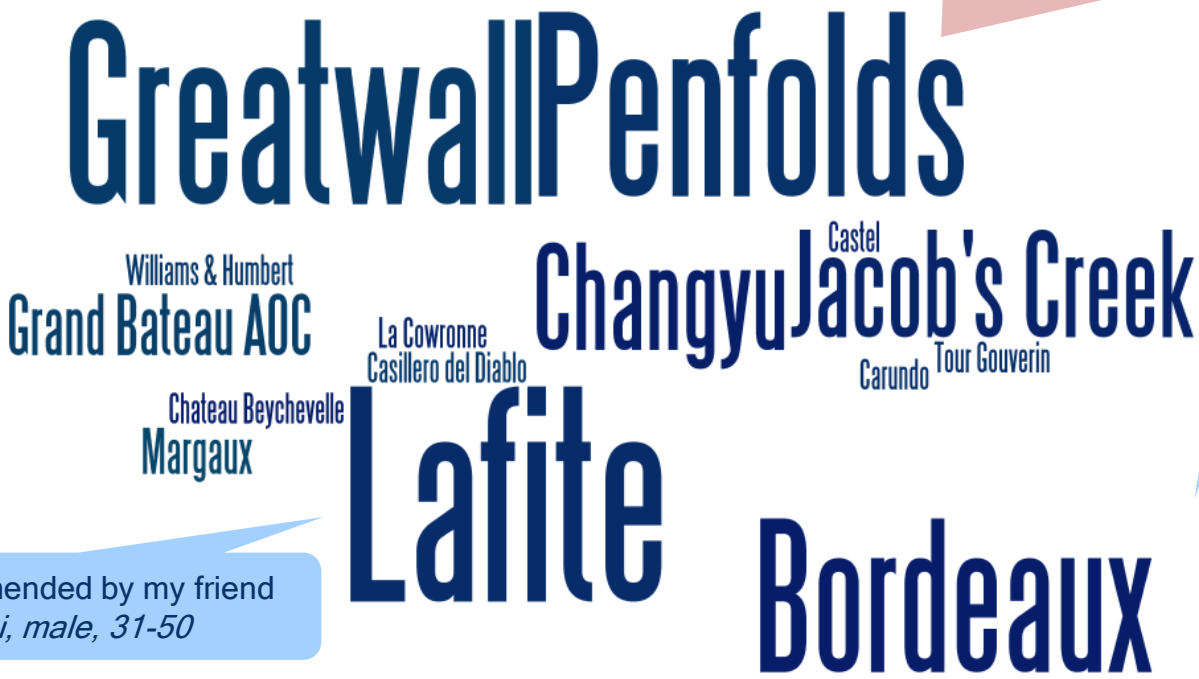
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What wines do they drink?

Lafite, Great Wall and Penfolds are the dominant brands respondents know and claim to drink

The size of words give greater prominence to brands that were mentioned more frequently in the rescreening process



Penfolds is a big brand and I trust their quality
Shanghai, female, 25-30

[Jacob's Creek] was recommended by my friend… It tastes good…. And when you go to KTV you can find Jacob's Creek everywhere
Shanghai, male, 31-50

Lafite – recommended by my friend
Shanghai, male, 31-50

Lafite – I have heard about it before I tasted it. I found it online and it's not extraordinarily expensive. I also saw it on TVC shopping channels. Brand story was quite impressive, so I bought it.
Shanghai, female, 25-30

French wine brands – too many for me to try them out one by one… also like the strong flavoured wines, so I choose Penfolds [because] it is quite well known and rich
Shanghai, male, 31-50

How do they describe the wines they like?

Taste characteristics, rather than flavour, are primarily used to describe the wine

Particularly important for younger people



Used more by women

[the wine I drink] is very pure, authentic, sweet and not too heavy. A strong aroma, natural. Good aftertaste.
Shanghai, female, 31-50

We talk about spicy, mild, just right… not fruit or vegetables… I would say like berry or fruity flavour… if a friend asked I'd say it tastes good, authentic aroma, nice length…
Shanghai, male, 31-50

The size of words give greater prominence to words that were mentioned more frequently in the exercise

Understanding unprompted wine taste descriptions:
The taste of wine is described by three main criteria

Generic terms describing good taste

Common terms used include “good”, “good taste”, and wide variety of terms demoting “smooth” (顺滑，柔顺，润滑，滑口，爽滑)

Many feel taste is a personal experience, prefer to describe generic good taste only and then let companion taste and evaluate themselves

Description of taste along 4 key dimensions

1. Sweetness
2. Acidity
3. Fruitiness
4. Astringency

More specific description of specific aspect of wine

Variety of terms depending on specific style of wine, including “long finish”, “mellow”, “pure”

4 primary dimensions used to describe wine

1

甜	“Tian”	Sweetness

- Used to describe sweet taste of residual sugar in wine
- A wine can be categorized as “dry wine” (e.g. “dry red”) while also described as “tian”
- Opposite to tian for most involved consumers is “gan” (dry), but “suan” (sour) can also be used
- While some sweetness is generally desired, domestic Chinese wines associated with sweeter style, which can signal lower quality

My desired sweet taste of wine is something like fruit sugar
Guangzhou, female, 31-50

Most people like sweetness of wine. But I prefer it to be less sweet, as I’ve noticed some low-end wines are too sweet.
Guangzhou, male, 31-50

Wine that is too sweet will make me get tired of it easily as it will overpower the fruit flavours
Chengdu, female, 25-30

4 primary dimensions used to describe wine

2

酸	"Suan"	Acidity

- Literally "sour", used to describe wines with high acidity
- Can also be used to describe lack of sweetness – some talk about desired balance between "tian" (sweetness) and "suan"

Appropriate sourness is helpful in refreshing your mouth.
Guangzhou, male, 25-30

Sourness is an essential part of wine taste. Wines without sour taste would not taste like grape-based wine.
Guangzhou, female, 31-50

Wine sourness, created by tannin acid, is unique from other sourness. Wine sourness is not the opposite of sweetness. Some sour wine also tastes sweet.
Guangzhou, male, 31-50

Pure is not too sweet, not too sour… subtle sourness [describing Jacob's Creek]
Shanghai, male, 31-50

4 primary dimensions used to describe wine

3

涩	"Se"	Astringency

- "Harsh", "rough" or "bitter" taste, linked to taste of alcohol and tannins; opposite of "smooth"
- A negative description for most, although some look for a limited amount of "se" in their wine, which gives wine a wine/alcohol taste that makes it distinct from juice or soft drinks

Language point:
In Guangzhou – where Cantonese is widely spoken - respondents in each of 4 groups asked for help with writing the character "se" (astringent), although the term was used comfortably and frequently in speech

Most domestic wines taste more astringent and less smooth. And the astringency will make you feel like having a stiff tongue and numb teeth.
Guangzhou, female, 25-30

Higher alcohol or a stronger body, will increase astringency, which I mean makes wine less easy to drink.
Guangzhou, male, 25-30

Wine with rich/complex tastes will easily to be astringent.
Chengdu, male, 31-50

I think good wine should to some extent be astringent. A good astringent taste comes from thick texture and makes you feel comfortable to drink.
Chengdu, female, 31-50

4 primary dimensions used to describe wine

4

果香	"Guoxiang"	Fruitiness

- Fruity flavours sought both when first tasting the wine and as an "aftertaste"
- Fruitiness spoken of as a broad concept rather than linked to specific fruits/berries; when probed, typically mention grape flavours

To make a wine taste more smooth, a good balance between alcohol and fruitiness needs to be achieved.
Chengdu, female, 25-30

Good fruitiness means it last for a long while in your mouth.
Guangzhou, male, 25-30

I drink wines which are rich - you will feel a good combination of alcohol and fruitiness.
Chengdu, female, 31-50

Fruitiness makes you feel the wine is pure and natural - with just grapes used, no any impurities added.
Chengdu, male, 25-30

Additional key concepts used to describe wine

醇	"Chun"	Mellow

- Describes soft taste typical for aged wine
- Term commonly used to describe taste of aged baijiu and tea

Mellow taste means this wine is tender and soft enough, and you feel comfortable and peaceful while drinking it.
Chengdu, male, 25-30

When you drink a mellow wine, you feel it's of long history and was produced by very professional wine makers.
Guangzhou, female, 31-50

回味	"Huiwei"	Long finish

- Literally "aftertaste", referring to pleasant taste in mouth after drinking

Lasting aftertaste is important to me. A good wine should make you feel fruitiness in your mouth for quite a while after drinking.
Guangzhou, male, 25-30

纯	"Chun"	Pure

- Used both on its own to describe clean, pure taste, as well as paired with "authentic"

Purity.. Feels like only grapes were used in making this wine, nothing else has ever been added.
Guangzhou, female, 31-50

To some extent, purity means being natural. 100% grape based, no artificial additions.
Chengdu, male, 25-30

More involved consumers also look to link taste attributes to the occasion for the wine

- Some consumers use “emotional” attributes, to describe specific wines – linking a taste to an occasion, e.g. a “romantic” wine for a dinner with partner
  - Particularly common among younger women
  - More common in Guangzhou than in Shanghai and Chengdu

I think a good wine should be pure enough, with good colour. And when you taste it, you would feel like eating Dove chocolate – very smooth.
Chengdu, female, 25-30



I can easily feel a romantic and elegant emotion when drinking a tasty wine.
Guangzhou, female, 25-30

I like to drink wine together with my husband at home… We prefer wines with strong flavour, so that we can enjoy it slowly.
Guangzhou, female, 31-50

[Jacob’s Creek:] Stronger aftertaste so you become more passionate…
. *Shanghai, male, 31-50*

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S Sparkling: Sweet and sour (high acidity) wines, enjoyed most when flavours felt balanced

Unprompted taste descriptors:



S2 - tastes sour and sweet. It has the proper amount of sweetness
Shanghai, female, 31-50

S - It's a bit too sweet and the alcohol is too strong. Bit irritating to my throat.
Shanghai, female, 25-30

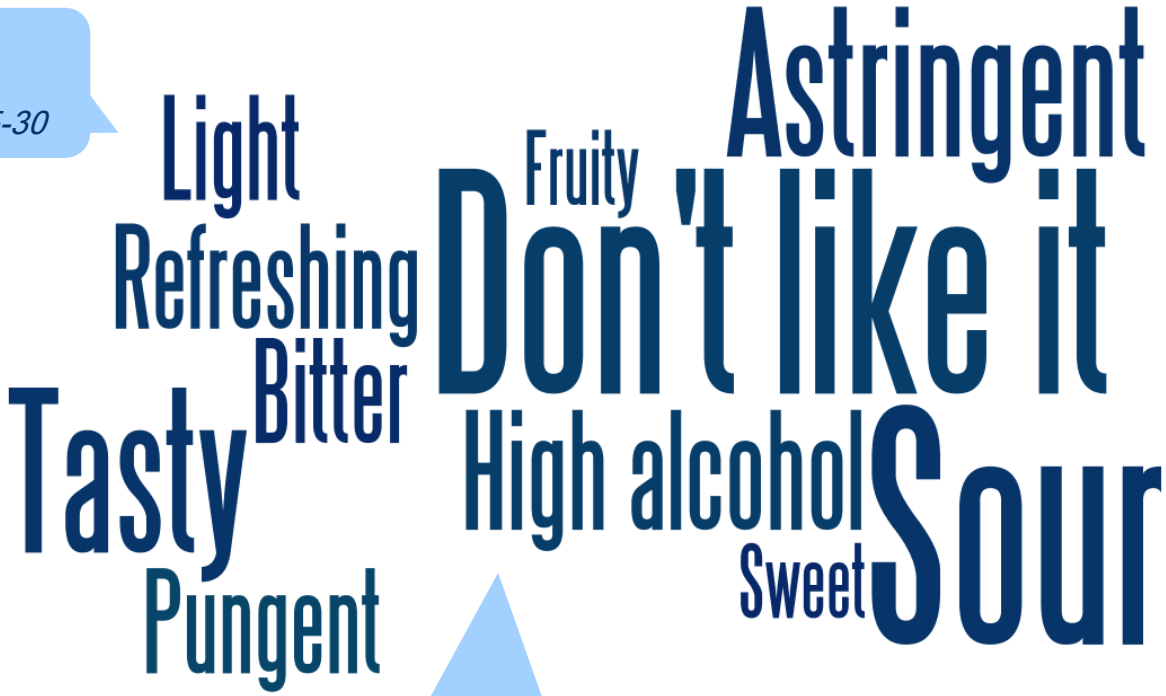
S is sparkling fruity wine - sweet pure and refreshing - rich aroma of natural fruits.
Shanghai, male, 25-30

The size of words give greater prominence to words written more frequently in the open-ended tasting questionnaire

R White wines: Lack of sweetness reduces appeal

Unprompted taste descriptors:

R it's light and refreshing flavour
Shanghai, male, 25-30



R - too strong alcohol - doesn't taste like wine either
Shanghai, male, 31-50

R2 Very strong aroma and alcoholic taste, it's astringent and dry feel on my mouth.
Shanghai, female, 31-50

The size of words give greater prominence to words written more frequently in the open-ended tasting questionnaire

Q Red wines: Strong and astringent wines balanced by fruitiness

Unprompted taste descriptors:



Q is my second best – for all. Pure and authentic flavour. Typical red wine
Shanghai, female, 31-50

Q2 is slightly astringent
Shanghai, female, 31-50

Q is like a wine – appropriate strength taste – rich and pure – authentic grape wine
Shanghai, male, 31-50

Q has the strongest astringent and bitter flavour and that's what I like. Taste is quite smooth
Shanghai, male, 25-30

Slightly sour, and like TCM [traditional Chinese medicine] herbs, some sweetness in the aftertaste
Shanghai, female, 25-30

The size of words give greater prominence to words written more frequently in the open-ended tasting questionnaire

M Sweet wines: Lack of astringency to balance the sweetness reduces appeal

Unprompted taste descriptors:

M is like a soda. Not like real wine. Perhaps alcohol content is too low
Shanghai, female, 25-30



Way too sweet and rich. It tastes like blended alcohol.
Shanghai, male, 25-30

Its fruitiness makes you feel there are many fruits mixed in the wine… rich and tasty.
Chengdu, female, 31-50

The size of words give greater prominence to words written more frequently in the open-ended tasting questionnaire

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How we tested flavour descriptors

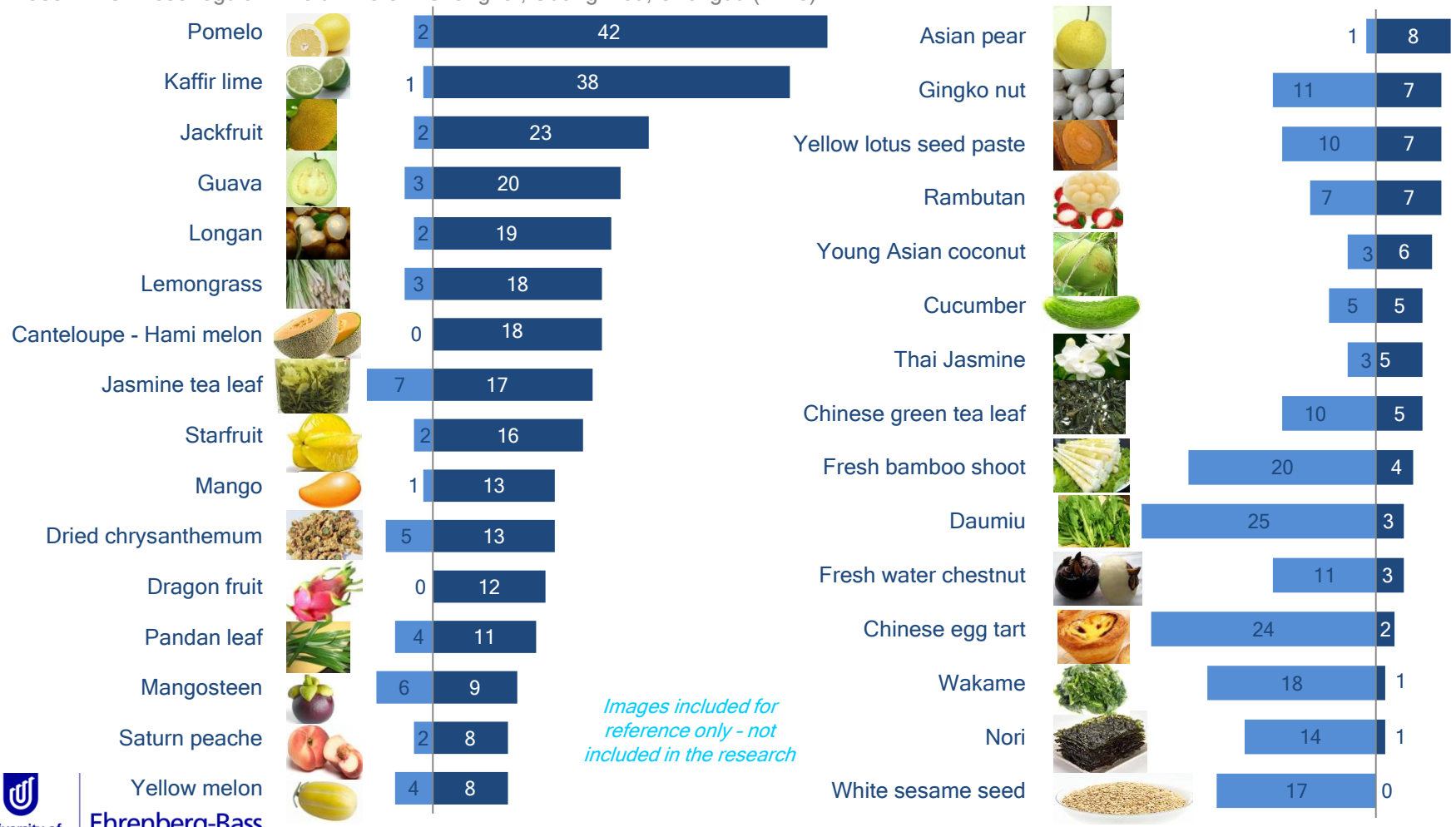
- We showed respondents lists of foods to describe wine flavours, written in mandarin, selected by the University of South Australia from Jeannie Cho Lee's 2011 book "Mastering Wine for the Asian Palate"
- Two types of flavour lists were shown to respondents – one for white, sparkling and sweet wines, and one for red wines
- Respondents saw one list for each style of wine once they had firstly tasted the wine specified for their group (see slide 9) and secondly filled in a preliminarily questionnaire which captured their initial impressions of the wine
- Respondents were asked to select from the lists of flavours, those that they felt were appropriate to describe the each of the wines they tasted
- Respondents were then asked to select the flavours across the two types of lists that they felt were inappropriate to describe the taste of wine in general

Descriptors for white / sweet / sparkling –
Citrus fruits work best, such as pomelo and lime

Descriptors for Sparkling/White/Sweet

Inappropriate descriptors | Appropriate descriptors

Number of respondents who tick the following flavours as appropriate/inappropriate to describe white/sweet/sparkling wine.
Base=All Chinese regular wine drinkers in Shanghai, Guangzhou, Chengdu (n=48)



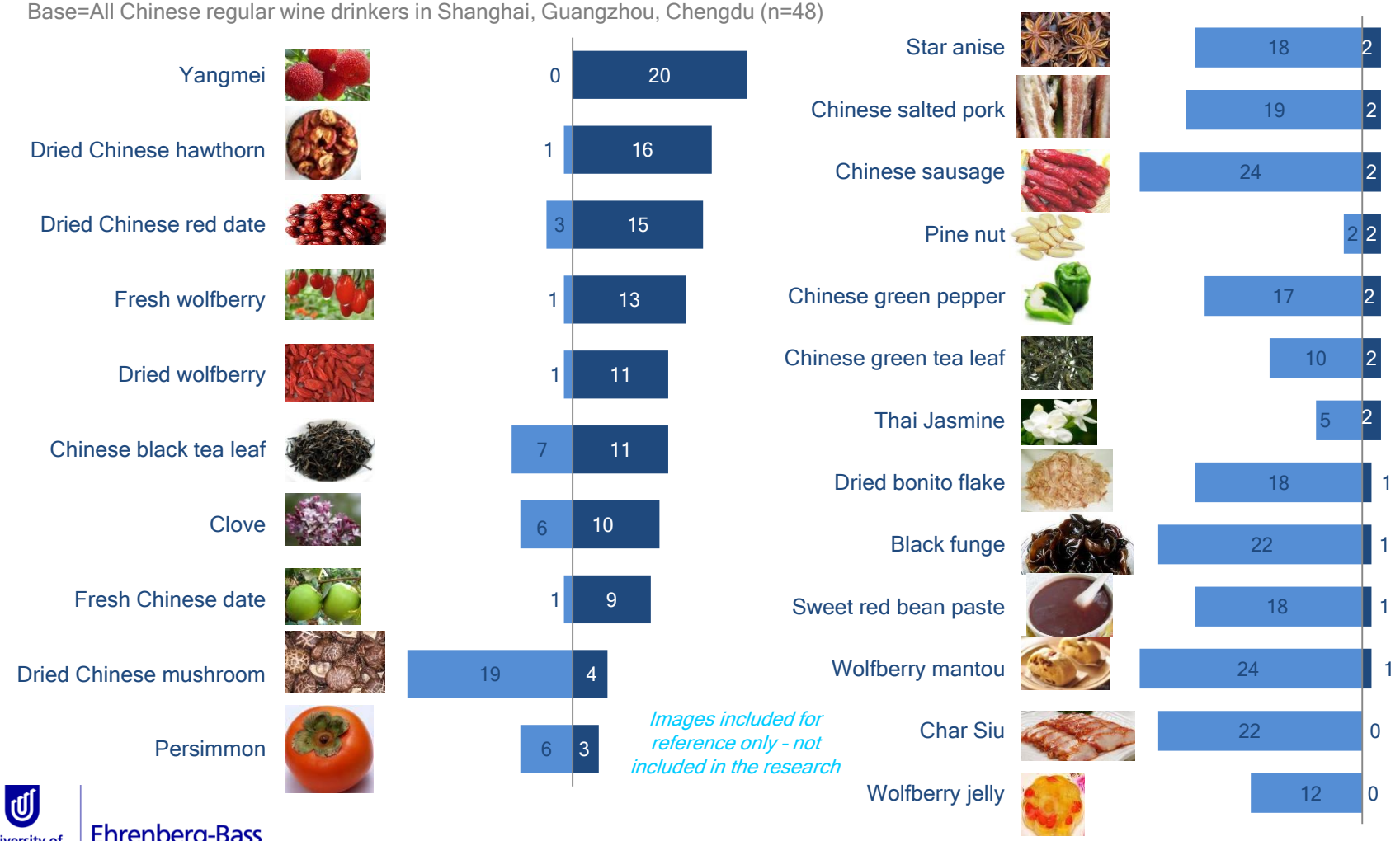
Images included for reference only - not included in the research

Source: Wine Intelligence focus groups, March 2013, n=48 Chinese regular wine drinkers in Shanghai, Guangzhou, Chengdu

Descriptors for red –
Dried red fruits work best, vegetables do not

Descriptors for Red

Number of respondents who tick the following flavours as appropriate/inappropriate to describe red wine.
Base=All Chinese regular wine drinkers in Shanghai, Guangzhou, Chengdu (n=48)

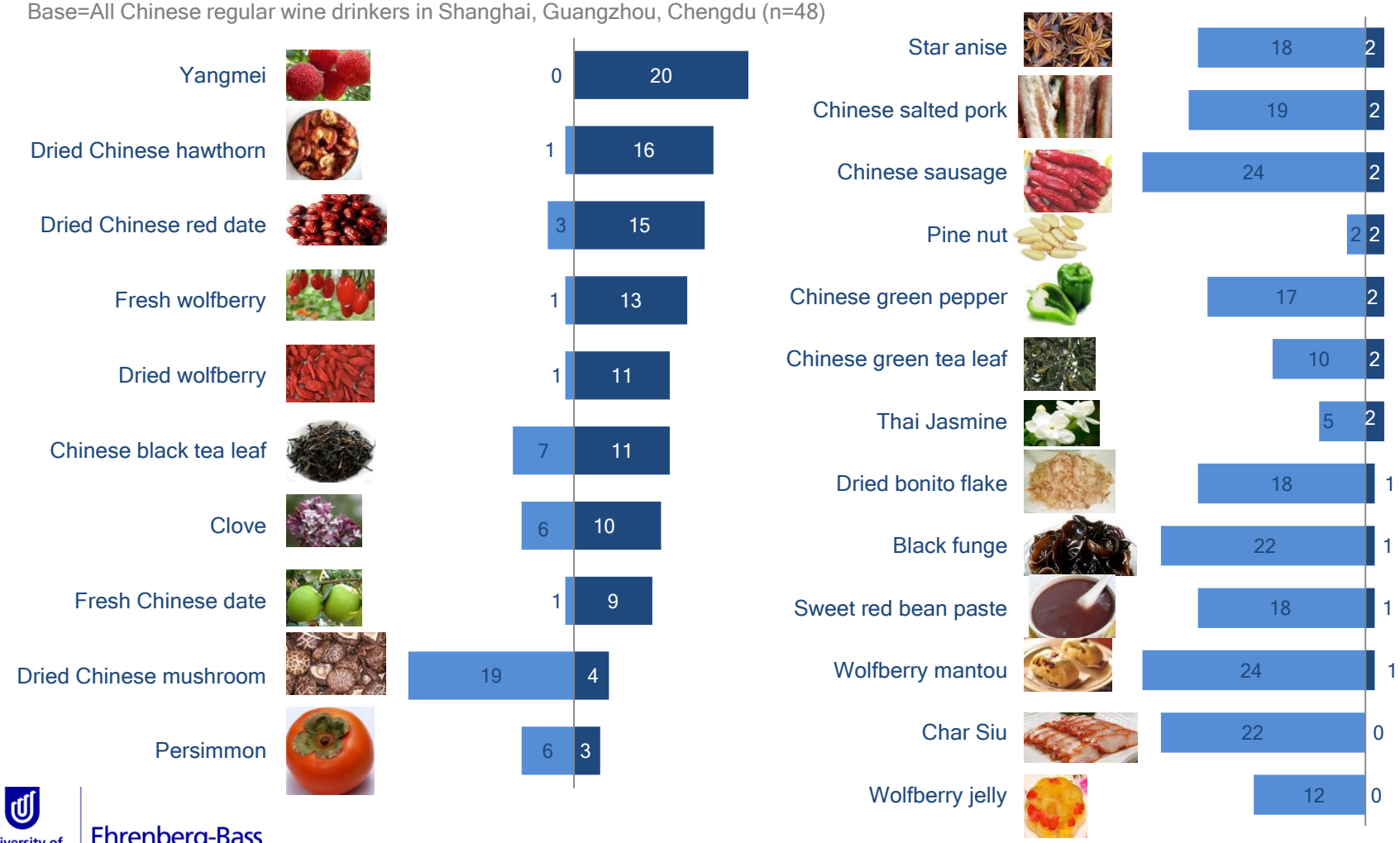


Source: Wine Intelligence focus groups, March 2013, n=48 Chinese regular wine drinkers in Shanghai, Guangzhou, Chengdu

Descriptors for red –
Dried red fruits work best, vegetables do not

Descriptors for Red

Number of respondents who tick the following flavours as appropriate/inappropriate to describe red wine.
Base=All Chinese regular wine drinkers in Shanghai, Guangzhou, Chengdu (n=48)

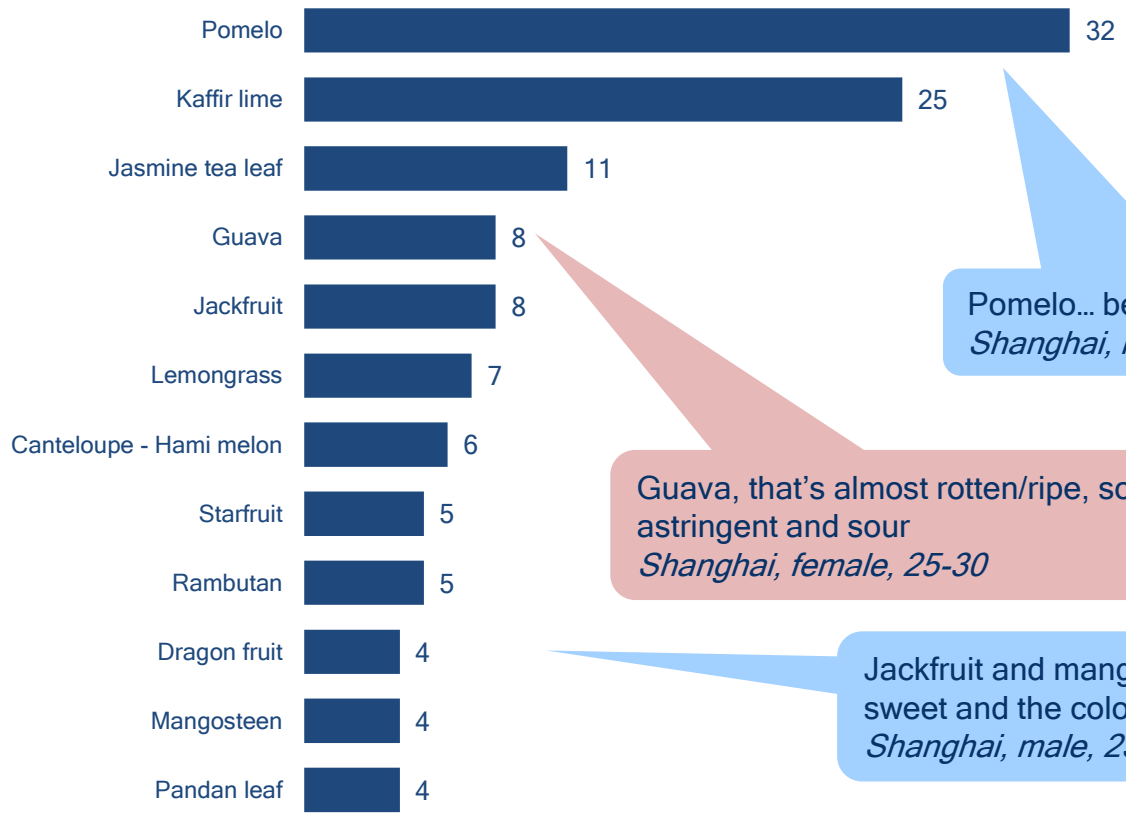


Source: Wine Intelligence focus groups, March 2013, n=48 Chinese regular wine drinkers in Shanghai, Guangzhou, Chengdu

Sparkling wine flavour descriptors: Pomelo and lime work best

Top 10 flavours to describe sparkling wine

Number of respondents who tick the following flavours as appropriate to describe sparkling wine.
Base=All groups in Shanghai, Guangzhou, Chengdu (n=48)



Note: translation for lime is literally "green lemon". If we had included lemon, a reasonable hypothesis is that respondents may have chosen this instead, as here they are here choosing the two that are very close in wording (lime + lemongrass).

Pomelo… because it feels refreshing
Shanghai, male, 25-30

Guava, that's almost rotten/ripe, so it's astringent and sour
Shanghai, female, 25-30

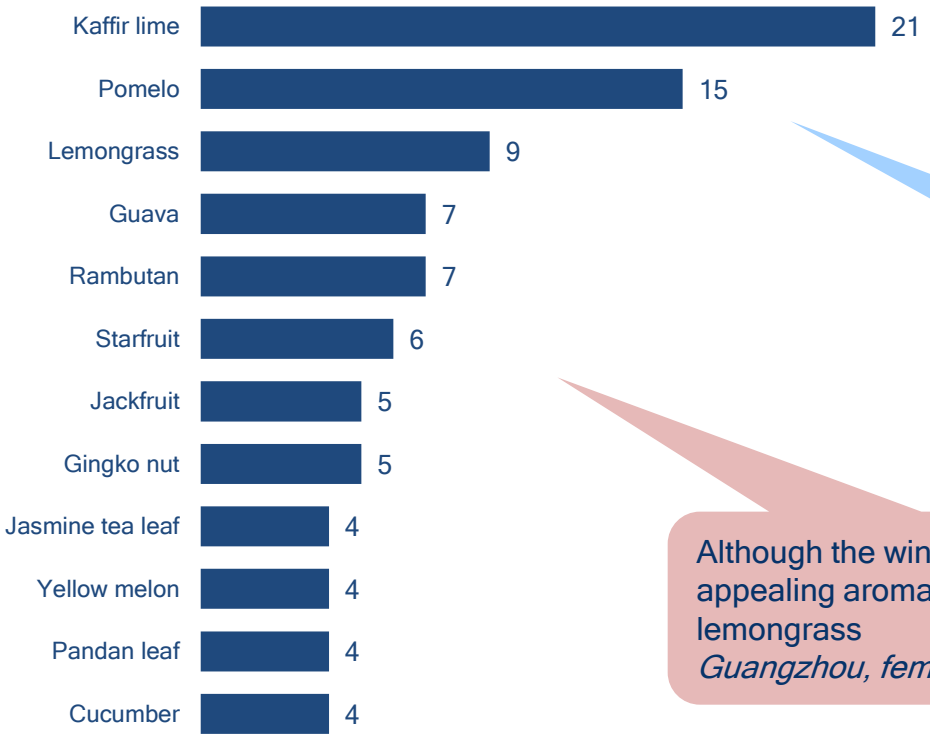
Jackfruit and mango because both are lightly sweet and the colours are a bit similar
Shanghai, male, 25-30

Source: Wine Intelligence focus groups, March 2013, n=48 Chinese regular wine drinkers in Shanghai, Guangzhou, Chengdu

White wine flavour descriptors: Pomelo and lime again work best

Top 10 flavours to describe white wine

Number of respondents who tick the following flavours as appropriate to describe white wine.
Base=All groups in Shanghai, Guangzhou, Chengdu (n=48)



Note: translation for lime is literally "green lemon". If we had included lemon, a reasonable hypothesis is that respondents may have chosen this instead, as here they are here choosing the two that are very close in wording (lime + lemongrass).

R - I choose pomelo because it tastes bitter
Shanghai, male, 25-30

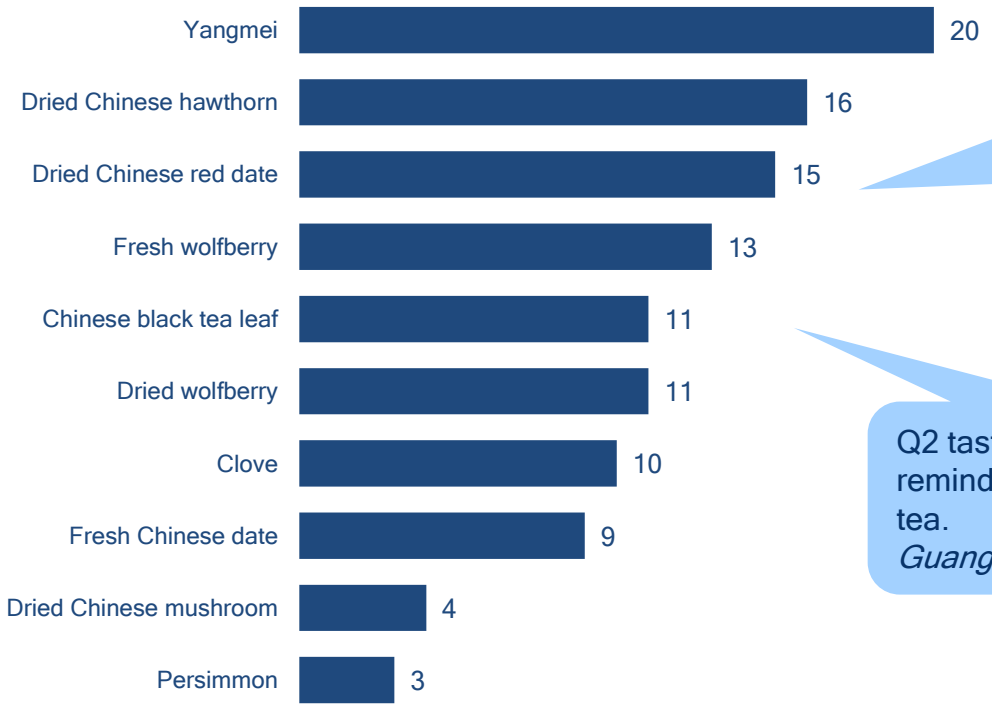
Although the wine is bitter, I can feel appealing aroma of jackfruit and lemongrass
Guangzhou, female, 25-30

Source: Wine Intelligence focus groups, March 2013, n=48 Chinese regular wine drinkers in Shanghai, Guangzhou, Chengdu

Red wine flavour descriptors: Range of dried red fruits work well

Top 10 flavours to describe red wine

Number of respondents who tick the following flavours as appropriate to describe red wine.
Base=All groups in Shanghai, Guangzhou, Chengdu (n=48)



Q the lingering taste reminds me of the cloves. Dried wolfberry - because it tastes a bit astringent like when you put wolfberry in your mouth
Shanghai, male, 25-30

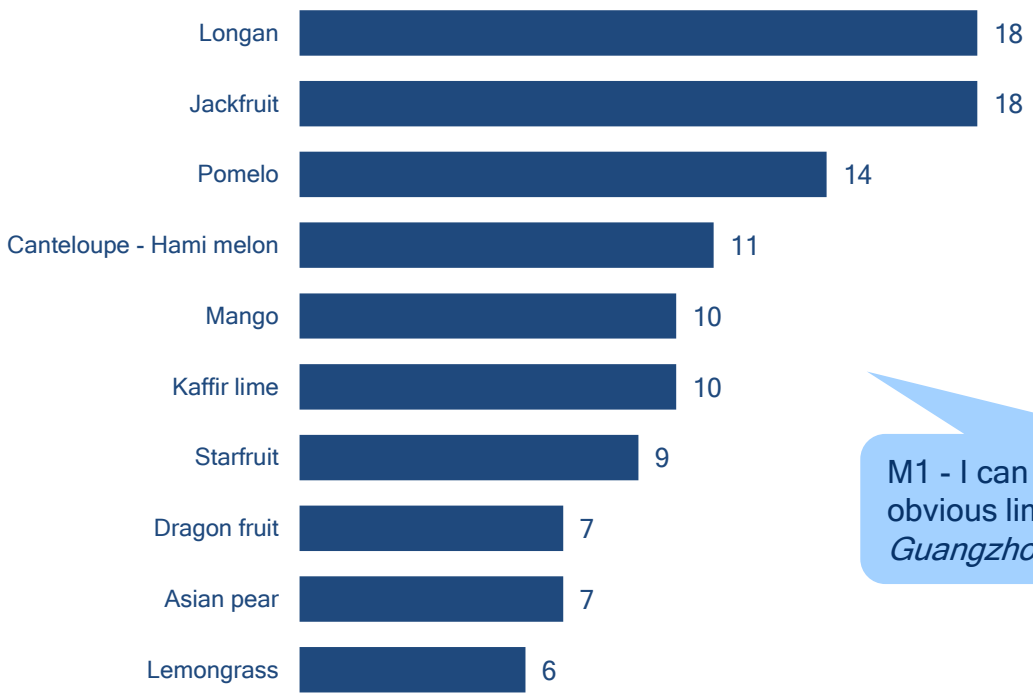
Q2 tastes very mellow, which reminds me of Chinese black tea.
Guangzhou, male, 31-50

Source: Wine Intelligence focus groups, March 2013, n=48 Chinese regular wine drinkers in Shanghai, Guangzhou, Chengdu

Sweet wines
Longan and jackfruit work well

Top 10 flavours to describe dessert wine

Number of respondents who tick the following flavours as appropriate to describe sweet wine.
Base=All groups in Shanghai, Guangzhou, Chengdu (n=48)



Note: Jeannie Cho Lee states that longan is the key flavour descriptor for Moscato and Muscat

M1 - I can feel nothing else but very obvious lime flavour in this wine
Guangzhou, male, 25-30

Source: Wine Intelligence focus groups, March 2013, n=48 Chinese regular wine drinkers in Shanghai, Guangzhou, Chengdu

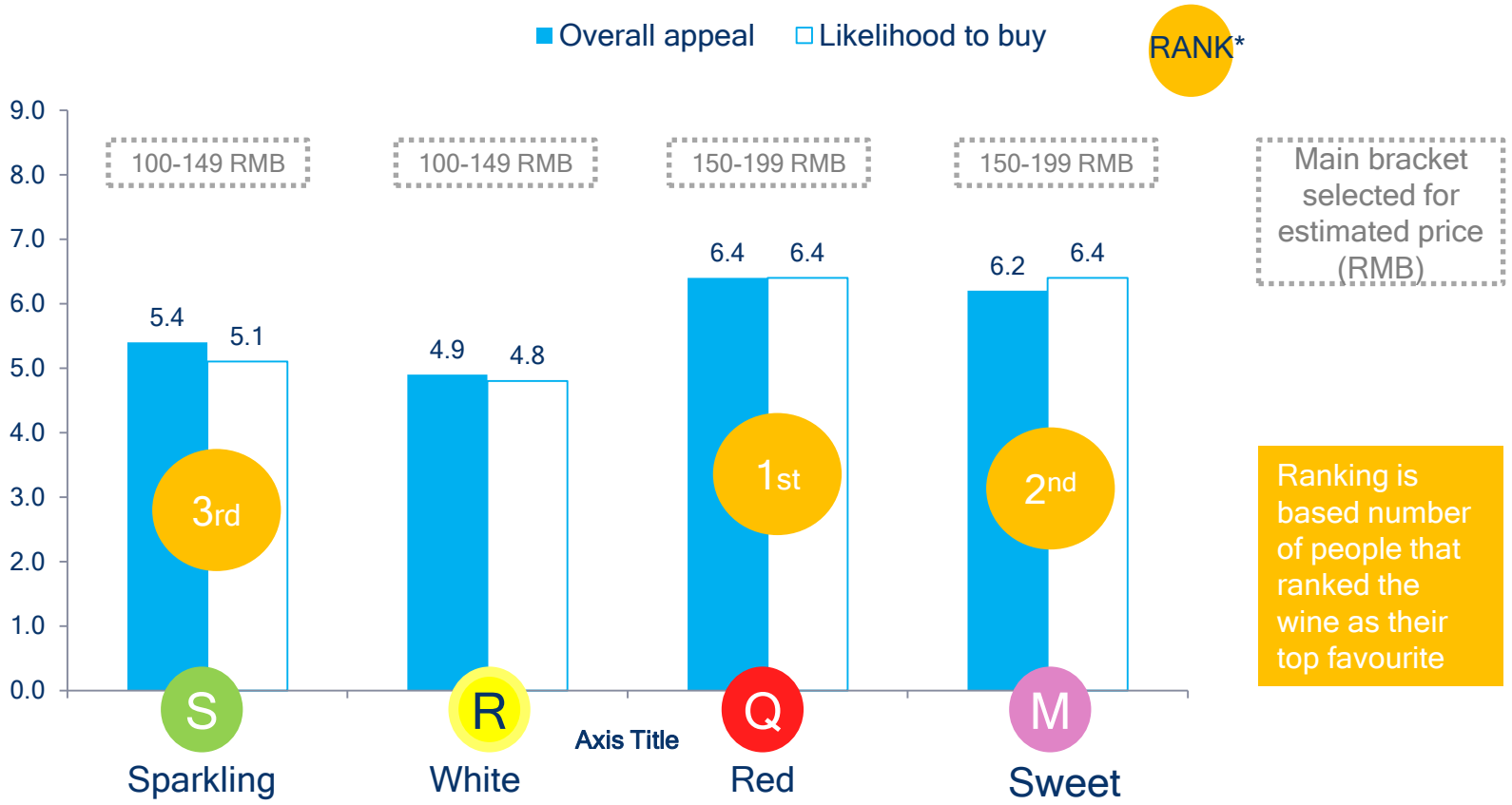
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Overall favourite wine by style group (S,R,Q,M)
Red and sweet wines favoured

Overall appeal and liklihood to buy

Overall appeal - What is your overall opinion of the wine you just tasted? *(1=Dislike extremely, 9=Like extremely)*
Likelihood to buy - How likely would you be to buy this wine if the price were right for you? *(1=Very unlikely, 9=Very likely)*
Base=All groups in Shanghai, Guangzhou, Chengdu (n=48)



Source: Wine Intelligence focus groups, March 2013, n=48 Chinese regular wine drinkers in Shanghai, Guangzhou, Chengdu

Appeal results by 4 sets of wines (set 1,2,3,4)

Sweet Moscato is liked the most

- Sweet Moscato (M1) does best of all wines
- Red Grenache (Q2), followed by the Tawny (M3) also popular

Overall appeal for 4 sets of wines

What is your overall opinion of the wine you just tasted? *(1=Dislike extremely, 9=Like extremely)*
Base=All groups in Shanghai, Guangzhou, Chengdu (n=48)

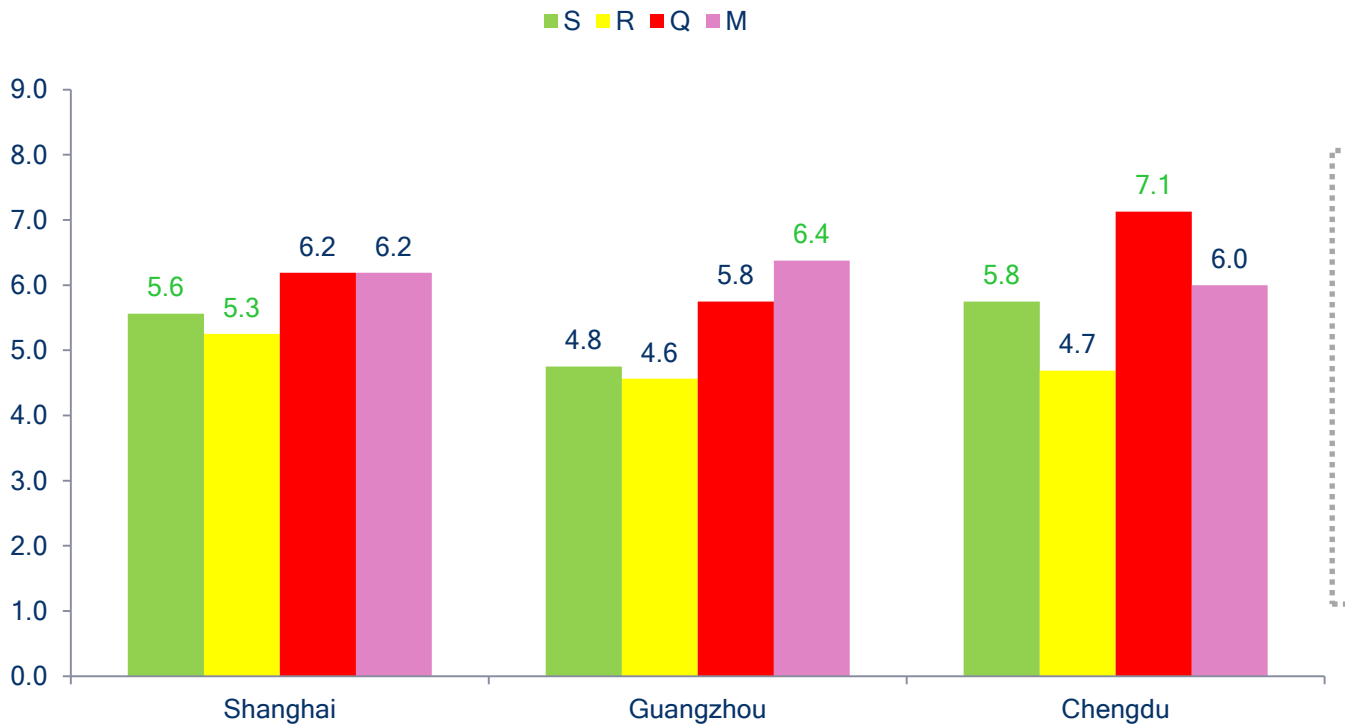


Source: Wine Intelligence focus groups, March 2013, n=48 Chinese regular wine drinkers in Shanghai, Guangzhou, Chengdu

Guangzhou respondents prefer sweet wines to reds, and more so than any other city

Average taste score by city

What is your overall opinion of the wine you just tasted? *(1=Dislike extremely, 9=Like extremely)*
Base=All groups in Shanghai, Guangzhou, Chengdu (n=48)



Average appeal score for each set of wines:

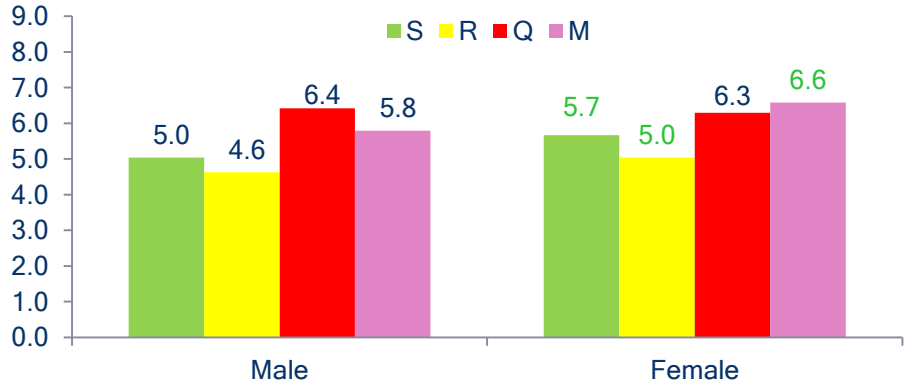
- S: 5.4
- R: 4.9
- Q: 6.4
- M: 6.2

Source: Wine Intelligence focus groups, March 2013, n=48 Chinese regular wine drinkers in Shanghai, Guangzhou, Chengdu

Women slightly more open to sparkling, whilst older respondents prefer reds

Overall average taste score by gender

What is your overall opinion of the wine you just tasted? *(1=Dislike extremely, 9=Like extremely)*
Base=All groups in Shanghai, Guangzhou, Chengdu (n=48)

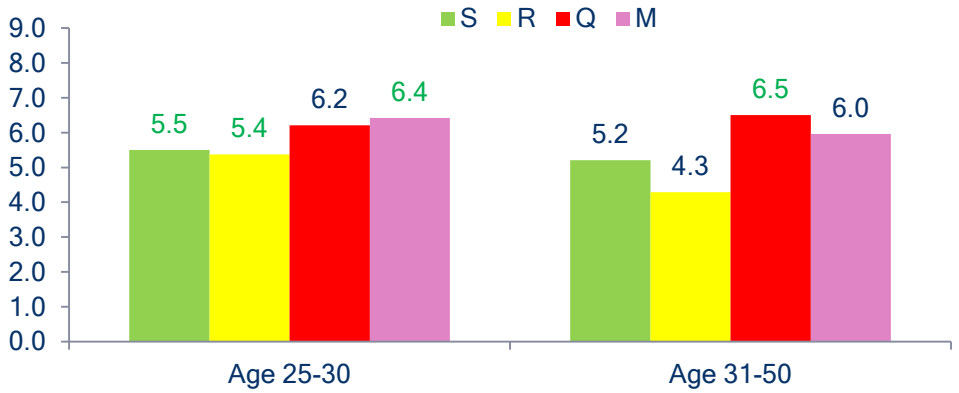


Average appeal score for each set of wines:

- S: 5.4
- R: 4.9
- Q: 6.4
- M: 6.2

Overall average taste score by age

What is your overall opinion of the wine you just tasted? *(1=Dislike extremely, 9=Like extremely)*
Base=All groups in Shanghai, Guangzhou, Chengdu (n=48)



Source: Wine Intelligence focus groups, March 2013, n=48 Chinese regular wine drinkers in Shanghai, Guangzhou, Chengdu

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S Overview of response to sparkling wines

Positives

- ✓ Celebratory, linked to (and referred to by some as) Champagne
- ✓ Lively, associated with youth and vitality
- ✓ Sweeter styles appealing in taste
- ✓ Sparkling red seems to do well – respondents in Chengdu feel it's an appealing version of a normal wine, what they usually drink

Stand-out wines in group

Moscato – did particularly well due to the sweetness with gentle fizz

> I like the carbonated wine with bubbles – this sparkling wine was graceful and elegant and premium
> *Shanghai, male, 31-50*

Negatives

- ❖ Limited number of occasions – less appropriate for drinking with food
- ❖ Makes drinker "gassy"
- ❖ Too similar to beer and soft drinks, too far removed in style from the style of red wine that defines the category – not thought of as wine
- ❖ Stronger fizz generally disliked

Improvements?

Make sweeter and less sour

> It tastes like grapefruit… don't like it, because it tastes too different from red wine, too sour
> *Chengdu, male, 25-30*

S Overview of response to sparkling wines

Occasions: seen as appropriate for social occasions, but mainly limited to celebrations

Occasions for sparkling wine



Used more by women

Weddings, to replace Champagne
Shanghai, male, 25-30

For young people to share together in light-hearted ambiance.
Shanghai, male, 25-30

We wouldn't drink sparkling wines often. Unless it's for celebrations
Shanghai, female, 25-30

Sparkling wine - sometimes, if you're hot. Usually I drink it at summer time, party, banquets.
Shanghai, male, 25-30

Country of origin match

Top-of-mind association of sparkling is with Champagne, although wines in study not believed to be Champagnes

Food pairing

- Not strongly linked to any particular food type

When you are dining you shouldn't drink wine with too much flavour or it ruins the food
Shanghai, female, 25-30

R Overview of response to white wines

Positives

- ✓ Some sweeter or more "flavourful" styles (e.g. Riesling) have appeal
- ✓ Some consumers associate white with the sweeter, fruitier taste that they look for in wine
- ✓ Perceived by some consumers as a good balance of sourness and astringency that gives refreshment

Stand-out wines in group

Claire Valley Riesling 2012 and Adelaide Hills Sauvignon Blanc 2012 – have fruity appealing flavours, although Adelaide Hills Sauvignon Blanc 2012 is too sour for some

Negatives

- ❖ All whites in research have lower appeal than reds tested
- ❖ Drier styles seen as too "sour" or too harsh in taste
- ❖ Low awareness of white wine overall

> It's very abnormal to have an imported wine to be so sour. *Chengdu, male, 25-30*

Improvements?

Make sweeter, fruitier and less sour

> There is nothing but sourness in your mouth after you drink it *Chengdu, female, 25-30*

> Too sour and too harsh. You may need to chill it for a longer while before drinking. *Chengdu, male, 25-30*

R Overview of response to white wines

Occasions: Seen as appropriate for social occasions or informal meals at home

Occasions for white wine



I would like to drink with some seafood at home…
Chengdu, female, 25-30

No occasions or food to go with such a sour wine. If I do need to pick a occasion, I would say hot pot outside with friends.
Chengdu, female, 31-50

Country of origin match

Some associate white wines with Germany

Very difficult to tell where it comes from.. Just a guess, it might be produced in Germany or Russia
Guangzhou, male, 25-30

Food pairing

- Ability to drink wine with a wide variety of occasions and foods seen as a desirable characteristic
- Some mention pairing white wine with seafood

R is for sushi and sashimi. Light-flavoured food
Shanghai, female, 25-30

Q Overview of response to red wines

Positives

- ✓ Default style choice for most occasions
- ✓ Safe choice when drinking with others
- ✓ Red colour is well received by Chinese customers as good for health

Stand-out wines in group
Barossa Valley Grenache 2010 and Barossa Valley Shiraz 2010 do well - fruity, not too bitter, yet enough astringency to taste like an authentic wine

> I will drink it before bed time, a healthy bitter sip is not too bad
> *Guangzhou, female, 25-30*

Negatives

- ❖ Taste of some wines seen as too "astringent" and lacking fruitiness
- ❖ Perceived as having higher alcohol level than white or sparkling

> It tastes thick and with strong alcohol, I won't try it as I think I would get drunk easily
> *Guangzhou, female, 25-30*

> A bit disappointed to find it lacks fruitiness
> *Chengdu, male, 25-30*

Improvements?
Enhance the fruit flavours

Q Overview of response to red wines

Occasions: Suitable for all wine-drinking occasions

Occasions for red wine



for KTV [karaoke] or when eating hot pot – if you combine this wine with the hot pot… you would feel warmed up by the wine as well
Shanghai, male, 25-30

Many occasions…home dinner, KTV, bar, party… good for both lunch and dinner..
Chengdu, female, 25-30

Bedtime, because it's got a Traditional Chinese Medicine taste
Shanghai, female, 25-30

Drink during dinner, with no matter Chinese or Western food
Chengdu, male, 25-30

Country of origin match

Although best-tasting wines assumed by many to be French, good red wines seen as coming from range of source countries, including Australia, Chile, Italy and Spain

WHERE? No idea, sorry
Shanghai, female, 25-30

I don't choose a particular food to go with Q4 [respondent's favourite]… I will probably go with steak, or salmon at home, or anything else..
Chengdu, female, 25-30

Food pairing

- Wines with stronger taste, or overly "se" when drunk on their own, are seen as being more appropriate for drinking with food, where the strong taste is balanced out and able to stand up to the food (e.g. red meat)
- Best-tasting wines generally seen as being the most versatile – can be drunk either on their own or with food

M Overview of response to sweet wines

Positives

- ✓ Sweet flavours liked, especially in Guangzhou
- ✓ Seen as being appropriate for women
- ✓ Sweeter and heavy body lead some respondents to associate with medicinal flavours, therefore boosting the wine's perceived health benefits

> Taste like a medicine, which makes me think that it's good for health
> *Chengdu, male, 31-50*

Stand-out wines in group

King Valley Moscato 2012 (overall most liked wine) – level of sweetness just right, closely followed by the Club Tawny, which was sweet but still most in line with what are considered to be "authentic" wine flavours

> M is very good – smell light fruit. Perfect fruit taste.
> *Shanghai, female, 25-30*

Negatives

- ❖ Some sweeter styles seen as too sweet and taste not appealing:
  - ❖ Lack a fresh fruit flavor
  - ❖ Some believe artificial ingredients are used
  - ❖ Lacking alcohol
- ❖ Sweet styles don't fit in with current drinking patterns – not appropriate for drinking with meal, seen as too sweet to drink full glass on its own
- ❖ Associated with domestic wines
- ❖ Medicine associations not positive for most

> Too sweet, very spoiled, I don't like the low alcohol wine
> *Chengdu, male, 25-30*

> It smells like Chinese medicine, not a wine
> *Chengdu, female, 25-30*

Improvements?

Preference for more balanced and easy-drinking sweet styles

M Overview of response to sweet wines

Occasions: Mainly for social gatherings or individual relaxation at home

Occasions for Sweet



Leisure activities at home e.g. listening to music, watching TV, reading

I would enjoy a glass while I enjoy my spare time at home in a lazy afternoon… watching TV or reading
Chengdu, male, 31-50

When I drink a sweet wine, I just drink it as a beverage, with no need to go with food.
Guangzhou, male, 31-50

Country of origin match

No strong country of origin associations
Some associated sweeter style with New World, including Australia

Food pairing

- Sweeter wines seen as appropriate for pairing with sweeter foods, although not limited to occasions
- Some mentions of pairing with spicier food

I will choose something spicy.. Because the sweet wine will help reduce spiciness in my mouth.
Guangzhou, female, 25-30

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Australian wine is a familiar New World country of origin, broadly associated with being fruitier and acceptable quality

- Concept of New World vs. Old World is familiar
  - Old World is seen as having a longer history, linked to better quality
  - Expect New World to be fruitier, and often sweeter

- Few have clear expectations of specific taste profile of Australian wines
  - Australia among countries cited that drink wine from (with France, Italy, Spain, Chile)
  - View Australia as superior in quality to domestic wines, but lower quality than French wines, and accordingly have lower price expectations than for French wines
  - Some expect to be fruitier and/or sweeter than French wines; most however do not have specific taste association
  - Some see Australian wine as simpler, compared to more complex French styles

> Australia wine tastes a bit closer to European wines… but simplified taste… not as luxurious… less complicated varieties…
> *Shanghai, male, 31-50*

> Because Australia doesn't have a very long history than they are not as expensive.
> *Shanghai, female, 25-30*

> I am not very familiar with Australia wine. But judging from its geography, I guess Australia wine should be heavier and with higher alcohol level than French wine.
> *Chengdu, male, 31-50*

Bottle shape provides first point of reference for wine style

- Bordeaux bottle is most familiar shape, especially for red wines - expected format for wines of high quality and with good taste
- Burgundy bottle less familiar, consumer unsure what to expect from product
- Traditional sparkling bottles familiar to most, linked to Champagne, expected to contain white sparkling wine
- Non-traditional bottle shapes (such as those used for sweet wines) create a strong demarcation from still light wine – some struggle to reconcile this format with expectations for wine
  - Some expect dessert wines to come in a long, thin bottle in style of Riesling or ice-wine

Colour stand-out is important for consumers, and darker colours associated with stronger, richer flavours

- **Bottle colour:** Desire for wine style and colour to be clearly visible when looking at bottle
  - Dark bottles assumed to contain red wine
  - White wines expected to be in clear or light-coloured bottles

- Limited specific expectations for **label styles** in relation to wine style
  - Top-of-mind associations link overall colour scheme of label to colour of wine, with darker labels for darker red wines, and lighter colours for white wines
  - For some, a more “luxurious” style, e.g. through use of silver and gold, linked to a richer or sweeter wine taste
  - Darker colours also linked to richer, more alcoholic styles
  - While / lighter colours and simple overall labels linked to lighter / more refreshing styles

S1 bottle is too dark for a sparkling wine
Shanghai, female, 25-30

Q 3 – I like this label, which gives an obvious information that this is a high quality wine. The golden colour, plus the layout of logo and instructions, make the bottle look really authentic
Chengdu, male, 31-50

S3 – I think this simple label is quite in line with the this wine, as it tastes very fresh and pure
Guangzhou, female, 25-30

R1 is nice – clear and simple, without unnecessary elements . This label fits well with the refreshing taste of this white wine
Guangzhou, male, 25-30



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