



PORTRAITS



CHINA | 2012

REPORT PRICE: GBP 2,500 or 5 Report Credits*

CONTENTS



1 MANAGEMENT SUMMARY

>> An introduction to China Portraits, including segment size, value, and an overview of each segment



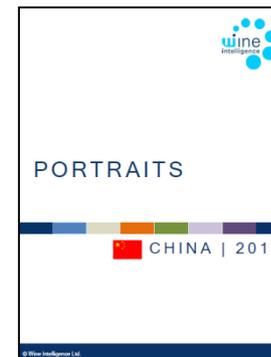
21 page PowerPoint (pdf) document



2 HANDBOOK

>> A more detailed description of each of the segments and their relationship with wine

- Overview of the groups
- Detailed description of each group
 - Adventurous Connoisseurs
 - Prestige-seeking Traditionalists
 - Social Newbies
 - Casual-at-Homers
 - Health Sippers
 - Frugal Occasionals
- Methodology



49 page PowerPoint (pdf) document



3 PROFILING TABLES

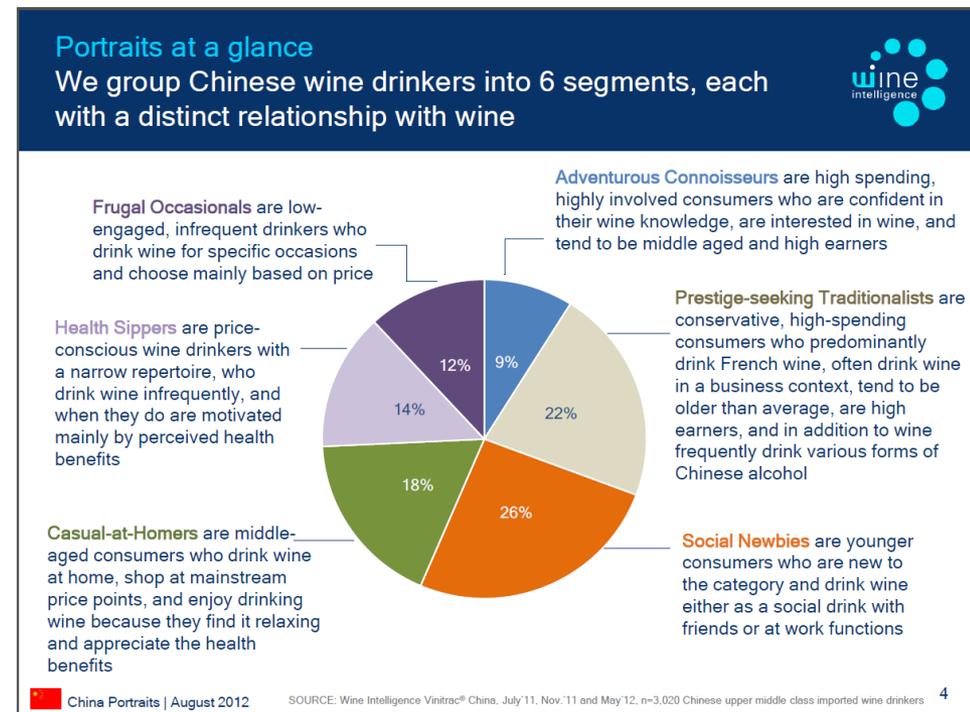
Segment	Share of imported wine drinking occasions	Share of total spend on imported wine	Who are they?	Typical male	High income
Prestige-seeking Traditionalists	22%	44%	Older than average	Typically male	High income
Adventurous Connoisseurs	18%	15%	Older than average	Typically male	High income
Social Newbies	15%	12%	Older than average	Typically male	High income
Casual-at-Homers	12%	10%	Older than average	Typically male	High income
Health Sippers	10%	8%	Older than average	Typically male	High income
Frugal Occasionals	8%	6%	Older than average	Typically male	High income

Excel document

What is China Portraits?



- Portraits is a segmentation of Chinese drinkers of imported wine. It groups these wine drinkers together into clusters based on their attitude towards and relationship with wine.
- Portraits provides wine businesses with a reference segmentation that can be used to better understand Chinese wine consumer behaviour, identify target consumer groups, and measure wine brand or region performance among specific consumer segments.
- We use a statistical method called cluster analysis to group consumers who have similar levels of based spend on wine, frequency of wine consumption and attitudes towards wine
- We then study these consumer groups through quantitative and qualitative research (including through focus groups, interviews, and through our online survey platform Vinitrac®) to build a deep understanding of how they behave and what motivations lie behind their wine consumption



What is the scope of Portraits?

- China Portraits focuses on Chinese wine drinkers who drink imported wine at least twice a year. In order to ensure data quality, we further focus our sampling on upper middle class consumers (with a monthly income of at least 4,000 RMB) who are aged 18-50 and live in six Tier 1 and Tier 2 cities: Beijing, Shanghai, Guangzhou, Wuhan, Chengdu and Shenyang
- The segmentation does not include consumers who drink imported wine less frequently than twice a year, those who only drink domestic wine, or consumers who do not drink wine at all
- Quantitative data for this study is collected through Vinitrac[®] China, an online survey that is run Beijing, Shanghai, Guangzhou, Wuhan, Chengdu and Shenyang. The survey sample is calibrated using quotas and post-weighting to be representative of imported wine drinkers in these cities based on age and gender. The sample distribution is included in the appendix
- In addition, a qualitative research program was conducted (see appendix for details on qualitative research methodology) in April 2012. 40 face-to-face interviews were conducted with wine drinkers from across the Portraits groups, helping us to build on the quantitative data to develop an in-depth understanding of the motivations and behaviours driving wine-drinking behaviour in China

Portrait-based wine business strategies



Our clients have used the Portraits report series in a variety of ways to target their high-potential consumers. Here are a few examples of how this consumer segmentation can be used to develop more tailored wine business strategies.

PORTFOLIO STRATEGY

The first step when selling a product to the UK market is deciding who the target consumers are. Wine companies have used UK Portraits to assess where their market opportunity lies by determining to whom their products might appeal, and to design an overall portfolio strategy that is targeted to these consumers.

BRAND HEALTH ASSESSMENT AMONG TARGET PORTRAIT GROUPS

Vinitrac® - our global online wine drinker survey – allows Wine Intelligence to assess brand health among both regular wine drinkers overall and within specific Portraits segments, including looking at trends over time. This can be used to understand with which consumers a brand is strongest and weakest, and to assess competitive positioning among target consumers.

When looking to explore how consumers react to a product's branding in more depth and what conscious and unconscious associations they have with the product, we often conduct focus groups with consumers from target Portrait segments, which allows us to build a deeper understanding not only of how the brand is viewed in general, but also how it fits into the wine drinking habits of the specific consumers for whom it is intended.

NEW PRODUCT TESTING

Newly developed products can be tested with target consumers in a variety of ways. In addition to focus groups, wine companies often ask us to test their product with a larger sample of consumers through hall tests, where we recruit consumers from the target Portrait group to taste the product and provide their feedback on the taste and style.

LABEL AND PACKAGING TESTING

To assess how a label or packaging design is positioned relative to its competitors, or how a new label design is perceived by consumers, we often use a combination of focus groups with target consumers to explore their reactions to the packaging combined with label testing with a representative sample of UK wine drinkers through our Vinitrac® survey platform. This allows us to see both how the packaging performs overall, and, importantly, how it performs among its core Portrait group.



- The data for this study was collected in July 2011, November 2011 and May 2012
- Data was gathered via Wine Intelligence's Vinitrac® online survey with 3,020 Chinese upper middle class drinkers of imported wine
- Methodology: Online survey
- Sampling strategy: Quotas (age, gender, city), stratified
- Screening criteria: Legal drinking age; drink imported wine at least twice per year; and drink red, white or rosé wine
- The survey was post-weighted to be representative of Chinese upper middle class drinkers of imported wine in terms of age, gender, and city

- Qualitative data for this study was collected primarily through a programme of in-depth interviews with Chinese consumers
- 40 face-to-face in-depth interviews with Chinese consumers of imported wine were conducted between April and May 2012 in Beijing and Shanghai
- Each interview lasted approximately 1 to 1.5 hours, and covered general wine drinking behaviour and preferences, motivations and attitudes towards wine, purchase choice cues, and categorisation and discussion of label designs based on a set of 40 sample labels
- Respondents were recruited to meet the following criteria:
 - Resident in Beijing or Shanghai
 - Aged between 25-50
 - Personal monthly income > 4000 RMB
 - Mixed wine consumption frequency:
 - Regular drinkers: 20 respondents drink imported wine at least once a month
 - Occasional drinkers: 20 respondents drink imported wine at least twice a year
 - Not employed in wine industry or market research

REPORT PRICE: GBP 2,500 or 5 Report Credits for a single-user licence

Format:

- Management Summary: 21 page PowerPoint (PDF)
- Handbook: 49 page PowerPoint (PDF)
- Data files (Excel)

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