

Report Brochure



## CHINA INTERNET AND SOCIAL MEDIA



JUNE 2014



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# Report price



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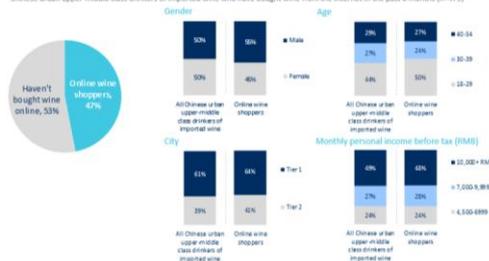
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## Demographics of online wine shoppers in China

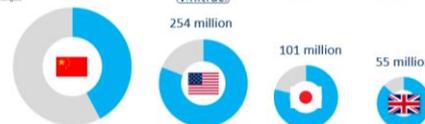
Chinese online wine shoppers slight male bias, with half of them below 30 years old and half earning 10,000 RMB per month

### Demographics of online wine shoppers in China

Chinese urban upper-middle class drinkers of imported wine who have bought wine from the Internet in the past 6 months (n=475)



<sup>1</sup> tax.com, accessed on 12/09/2014  
 Source: Wine Intelligence, Vinitrac<sup>2</sup> China, April 2014, n=1,004 Chinese urban aged 18-54 upper-middle class drinkers of imported wine in Beijing, Shanghai, Guangzhou, Shenzhen, Hangzhou, Shenyang, Chongqing, Wuhan, Chengdu



Source: CNNIC January 2014 Statistical Report on Internet Development in China  
 Wine Intelligence estimation based on internet users and population 2012, [Worldbank](http://data.worldbank.org/indicator/IT.NET.USER.F2), <http://data.worldbank.org/indicator/IT.NET.USER.F2>, accessed on 07/06/2014

## the world in 2014



gories, and wine is no different. We  
 . And in tier 1 cities especially, half of  
 p 5 stores for buying wine, two are  
 nient and trusted channel for buying

brands do to differentiate themselves  
 to insights about what consumers want  
 ners<sup>3</sup>, wine brands might want to start  
 ions or product types that are more  
 ters to understand the profile.



Source: The Selfie Obsession in China, Wine Intelligence Network News, published 20 May 2014, <http://www.wineintelligence.com/the-selfie-obsession-in-china/>

# Excerpts from the introduction



“On average, Chinese consumers spend 479 minutes (~8 hours) on screens every day. Much of the time is spent on computers, smart phones or tablets, rather than televisions. In fact, China now has the largest population of internet users but also the largest population of internet shoppers in the world. Knowing the identities, behaviours and motivations of these screen-scrolling consumers is a pre-requisite for marketers to develop effective digital marketing strategies for this market.”

“Wine Intelligence China Internet and Social Media Report estimates 21 million Chinese drinkers of imported wine often look for wine information online, out of the 38 million total drinking population. When we survey our sample of imported wine drinkers this year among three tier 1 cities and 6 tier 2 cities, we’ve seen consistently that online sources remains the top channel for consumers to make quick judgement on brands. With the fast development of mobile technology and 3G services, consumers are more likely to access online information whenever and wherever they can. We have also seen wine drinkers use a more diverse sources either traditional and online for wine information. Managing your brand information and consumer relationship online consistently is thus crucial for brands as it affects how your brand is seen, if your brand is trusted and how it is positioned in consumers’ mind.”

“The e-commerce channel is seeing huge growth in most consumer goods categories, and wine is no different. We estimated that 16 million drinkers of imported wine now shop for wine online. And in tier 1 cities especially, half of the imported wine drinking population buy wine from internet. Among the top 5 stores for buying wine, two are online marketplaces. The online channel is seen as more cost-effective, convenient and trusted channel for buying wine.”



RUI SU  
China Country Manager



CHUAN ZHOU  
Research Analyst



# Vinitrac<sup>®</sup> China methodology



- Vinitrac<sup>®</sup> data for this study were collected in April 2014
- Data were gathered via Wine Intelligence’s Vinitrac<sup>®</sup> online survey of:
  - 1,004 Chinese urban upper-middle class drinkers of imported wine
- Respondents were screened to ensure they met the following requirements:
  - Urban upper-middle class: personal income of at least 4,500 RMB before tax per month in tier 2 cities (Wuhan, Shenyang, Chengdu and Chongqing); personal income of at least 6,000 RMB before tax per month in tier 1 cities (Beijing, Guangzhou, Shanghai, Hangzhou and Shenzhen)
  - 18-54 years old
  - Residents of Beijing, Guangzhou, Shanghai, Wuhan, Shenyang, Chengdu, Hangzhou, Shenzhen and Chongqing
  - Drink 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 survey was quota-based and post-weighted to be representative of Chinese urban upper-middle class imported wine drinkers in terms of age, gender, geography, and income
- The distribution of the sample is:

Mainland China		
		2014
		Sample size
		1,004
Gender	Male	50%
	Female	50%
	Total	100%
Age	18 - 29	44%
	30 - 39	27%
	40 - 54	29%
	Total	100%
City	Beijing	17%
	Guangzhou	11%
	Shanghai	17%
	Wuhan	10%
	Chengdu	8%
	Shenyang	9%
	Hangzhou	7%
	Shenzhen	9%
	Chongqing	12%
	Total	100%
Income	RMB 10,000 or above	49%
	RMB 7,000-9,999	27%
	RMB 4,500-6,999	24%
	Total	100%



# Vinitrac® China methodology – tracking 1



- Vinitrac® data for this study were collected in October 2012 and April 2014
- Data were gathered via Wine Intelligence’s Vinitrac® online survey of:
  - 708 Chinese urban upper-middle class drinkers of imported wine (October 2012)
  - 446 Chinese urban upper-middle class drinkers of imported wine (April 2014)
- Respondents were screened to ensure they met the following requirements:
  - Urban upper-middle class: personal income of at least 6,000 RMB before tax per month
  - 18-49 years old
  - Residents of Beijing, Guangzhou, Shanghai
  - Drink 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 survey was quota-based and post-weighted to be representative of Chinese urban upper-middle class imported wine drinkers in terms of age, gender, geography, and income
- The distribution of the sample is:

		Mainland China	
		2012	2014
		<i>Sample size</i>	
		708	446
Gender	Male	68%	52%
	Female	32%	48%
	Total	100%	100%
Age	18 - 29	35%	44%
	30 - 39	40%	28%
	40 - 49	26%	28%
	Total	100%	100%
City	Beijing	19%	37%
	Guangzhou	22%	25%
	Shanghai	59%	38%
	Total	100%	100%
Income	RMB 10,000 or above	73%	60%
	RMB 7,000-9,999	24%	30%
	RMB 6,000-6,999	3%	10%
	Total	100%	100%

Source: Wine Intelligence, Vinitrac® China, October 2012 (n=708), April 2014 (n=446) Chinese 18-49 year-old urban upper-middle class (income > 6,000 RMB per month before tax) drinkers of imported wine in Beijing, Shanghai, Guangzhou



# Vinitrac® China methodology – tracking 2

## For wine-buying channel usage tracking only



- Vinitrac® data for this study were collected in December 2012 and April 2014
- Data were gathered via Wine Intelligence’s Vinitrac® online survey of:
  - 699 Chinese urban upper-middle class drinkers of imported wine (December 2012)
  - 446 Chinese urban upper-middle class drinkers of imported wine (April 2014)
- Respondents were screened to ensure they met the following requirements:
  - Urban upper-middle class: personal income of at least 6,000 RMB before tax per month
  - 18-49 years old
  - Residents of Beijing, Guangzhou, Shanghai
  - Drink 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 survey was quota-based and post-weighted to be representative of Chinese urban upper-middle class imported wine drinkers in terms of age, gender, geography, and income
- The distribution of the sample is:

		Mainland China	
		2012	2014
		<i>Sample size</i>	
		699	446
Gender	Male	68%	52%
	Female	32%	48%
	Total	100%	100%
Age	18 - 29	31%	45%
	30 - 39	42%	28%
	40 - 49	27%	28%
	Total	100%	100%
City	Beijing	19%	37%
	Guangzhou	23%	25%
	Shanghai	59%	38%
	Total	100%	100%
Income	RMB 10,000 or above	61%	61%
	RMB 8,000-9,999	25%	23%
	RMB 6,000-7,999	14%	17%
	Total	100%	100%

Source: Wine Intelligence, Vinitrac® China, December 2012 (n=699), April 2014 (n=446) Chinese 18-49 year-old urban upper-middle class (income > 6,000 RMB per month before tax) drinkers of imported wine in Beijing, Shanghai, Guangzhou



## SAMPLE SIZES

At least 1,000 respondents per survey

Imported wine drinkers (where 'regular' = drinks wine at least twice per year)

Each Vinitrac® survey starts with questions to screen respondents:

- Adult drinking age within each country
- Permanent resident of the country being surveyed
- Drinks imported wine at least twice a year
- Drinks at least red, white or rosé wine
- Buys wine in the off-trade and/or in the on-trade channels
- From upper-middle class based on monthly income (more than 10,000 RUR)

... and rejects all respondents who do not fulfil these Vinitrac® criteria



Each sample is representative of the wine drinking population in that market and is therefore valid; a sample size of at least 500 consumers ensures results are reliable. It's like a 'smaller' version of the wine drinking population at large



## WHY IS VINITRAC® NOT A PANEL?

- Panels are good for monitoring detailed purchase activity but require regular input from exactly the same complete group of respondents
- This requires more time from respondents, for which they are paid, and panels are therefore more heavily skewed towards home-based consumers, e.g. students and home-makers
- This group of a country's wine-drinking population does not fully represent the accurate weighted sample of adult regular wine drinkers on which Vinitrac® insights are based

## HOW DOES VINITRAC® WORK?

- Invitations to participate in Vinitrac® are distributed to adult consumers in each market
- Consumers interested in a wine survey are directed to an URL address, which welcomes them to the online survey
- Wine Intelligence monitors incoming completed responses to build a sample representative of the wine drinking population of the target market
- When a representative sample of at least 700 is logged, the survey is closed



# Questionnaire design: Sources of wine information tested



Sources of wine information were defined based on the following question: *Do you ever look for opinions or recommendations **about wine** from the following sources?*

[Options presented in random order; respondents asked to select frequency of use]

## Traditional sources

1. Friends, family or colleagues
2. Shop staff in wine store
3. Supermarket staff
4. In-store shelf signs / display with information about wine
5. Television (e.g. food & wine programs)
6. Radio (e.g. food & wine programs)
7. Newspaper wine sections or columns
8. Lifestyle/cooking magazine wine sections or columns
9. Wine guide
10. Wine magazine

## Online sources

1. Wine information website
2. Wine producer/brand website
3. Website promoting particular wine regions or countries
4. Wine merchant's website
5. Comments on online shopping websites (e.g. Taobao, yesmywine.com)
6. Articles about wine on Wikipedia/Baidu Zhidao
7. Newspaper or magazine website
8. Supermarket websites
9. Search engine (e.g. Baidu, Google)
10. Posts and discussions on friend/family's blog or microblog
11. Posts and discussions on wine expert's blog or microblog
12. Posts and discussions about wine on a social networking website (e.g. Renren/Kaixin)
13. Posts and discussions on friend/family's wechat
14. Post about wine on a BBS forum



# Questionnaire design: Website list



Website usage was tested using the following question: *Which of the following websites, forums or blogs do you use to search for or learn about wine?*

[Options presented in random order]

1. Baidu
2. Sina Weibo
3. WeChat
4. Baidu Zhidao
5. Taobao (including Tmall)
6. Jingdong
7. Winechina.cn
8. Wikipedia
9. Amazon China
10. Yesmywine
11. wines-info.com
12. Winekee
13. Google
14. QQ Zone
15. QQ Weibo
16. Renren
17. winesinchina.com.cn
18. Tianya
19. Douban.com
20. Trends.com.cn/diet
21. Youku
22. Tudou
23. NetEase Microblog
24. Hudong
25. Decanter China
26. Kaixin
27. Jiulifang.com
28. Vinehoo
29. Yixiang
30. Boboqiu
31. Other
32. None of these

Platforms used for discussing wine were tested using the following question: *Which of the following websites, forums or blogs do you use to discuss wine?*

[Options presented in random order]

1. WeChat
2. Sina Weibo
3. QQ Zone
4. Baidu Zhidao
5. bbs.winechina.com/
6. Yesmywine.com
7. Taobao (including Tmall.com)
8. wines-info.com/bbs/
9. Renren
10. Jingdong
11. Tianya
12. QQ Weibo
13. Amazon China
14. Douban.com
15. bbs.vinehoo.com/
16. Kaixin
17. Wikipedia
18. trends.com.cn/diet/
19. Google +
20. Womai.com
21. t.163.com
22. Everwines.com
23. Other
24. None of these



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