

# Report Brochure



## CHINA INTERNET AND SOCIAL MEDIA REPORT

Use of online sources of wine information  
among Chinese wine consumers



September 2011



REPORT PRICE: £1,500 or 3 Report Credits

# Introduction



Anyone who has spent time in China knows how central the internet is to the Chinese upper middle class consumer. Recent studies have confirmed that Chinese consumers are among the most connected in the world, and many have argued that China represents perhaps the most interesting market globally right now for online marketing.

The internet in China is more than just a straightforward source of information - for many consumers, it's a way of life. A McKinsey survey in 2009 found that people in China's 60 largest cities spend around 70% of their leisure time online, and one in five consumers aged between 18 and 44 won't buy a product without first researching it online<sup>1</sup>. In China, perhaps even more than in the rest of the world, the internet matters.



The question for us was whether this central role of the internet carried through to the world of wine - we know that Chinese consumers are using the internet for online shopping and general product research, but are they using it for information about wine?

The answer was a resounding yes. Not only is the internet an important source of information for wine - 69% of upper middle class imported wine drinkers say that they often go online to look for wine information (78% of our sample)<sup>2</sup> - it's actually the most important source, more important even than recommendations from friends and family. If we include those who say that they sometimes use online sources, nearly all of our sample have at least occasionally gone online to learn about wine.

The widespread use of the internet for wine information shouldn't come as too much of a surprise in the context of the Chinese market, where not only are consumers highly connected, but we're also looking at a highly targeted population of imported wine drinkers who have higher than average income and education. In addition, those who do drink wine tend to have fewer people around them who share the same interest. The internet then becomes a natural forum for connecting with others with a similar interest in wine and have relevant experiences to share.



SOURCE: <sup>1</sup>"China's Internet Obsession", McKinsey Quarterly, March 2010

<sup>2</sup>Wine Intelligence, Vinitrac® China, July 2011, n=1,017 Chinese upper middle class imported wine drinkers aged 18-50 in Beijing, Shanghai, Wuhan and Guangzhou who use the internet

# Introduction (continued)



The extensive use of the internet for wine information is, however, still striking when we compare this to how consumers in other markets find their information about wine. In the more mature markets that we have studied, online sources trail behind traditional sources (such as recommendations from friends and family and advice from shop staff) in terms of their importance as sources of wine information. In China, in contrast, virtually all of the top wine information sources are online. The implications for the industry are clear - an online marketing strategy needs to be top priority when communicating to Chinese consumers.

The websites that Chinese wine drinkers use for wine information include some that are difficult to control - including Baidu, China's largest search engine - but also others through which brand owners and producers can communicate directly to consumers. One source that stands out is Sina Weibo, China's largest microblog service, where several forward-thinking wine brands have already set up brand pages through which they connect directly with their customers.

A large percentage of consumers also say that they go to brand or producer websites for information, and these websites are in general seen as being a highly trustworthy source of information. For the trade, this should reiterate the importance of having an accessible and well-designed website in Chinese through which consumers can learn more, including taste description and food matching recommendations.

The wine category is still in its infancy in China, and the ways in which consumers use the internet to learn about wine will likely change over time. For now, the key message that we need to take away from this study is how central the internet is as a source of information for Chinese wine consumers, and the extent to which using the right online channels offers a powerful and accessible avenue to connect directly with the people drinking wine in this important market.



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- Full source usage list, online and traditional sources, with usage by “often” and “sometimes”
- Full tables of types of website usage
- Full list of trust in source, online and traditional sources, penetration (with base as full sample) and conversion (with base as those who use the source)
- Channels through which consumers provide positive and negative recommendations - conversion (with base as those who use the source)
- Impact on purchase decision - conversion (with base as those who use the source)

# This report is part of the Internet & Social Media Report Series



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## REPORT SERIES SYNOPSIS

Using Vinitrac® - the Wine Intelligence global wine drinker survey - the **Internet & Social Media report series** answers your online communication business questions.

Each 40-60 slide PowerPoint report details:

- Where do people find their wine information online: Most popular social media and websites for wine information
- How usage of online media compares to the use of traditional media (television, radio, word of mouth, printed media etc.) as a source of information on wine
- Who is using the Internet and social media to look for wine information: Profiles of people who actively share wine information online, those who passively search for wine information online and those who do not use these media for wine information



# Exploring Chinese consumer use of internet and social media for wine information



## Research questions for this report

1. What sources of information, including online sources, do Chinese consumers use to learn about wine?
2. How do Chinese consumers use online sources of information?
  - What types of activities are various types of websites used for?
  - What level of trust do consumers have in these sources?
  - Where do consumers tend to share opinions about wine?
  - What is the overall impact of various online sources on wine purchasing?
3. Who tends to share opinions about wine online, and what is this group's relationship with wine?

## Who we spoke to

- To accurately capture the opinions and behaviour of China's 18.6 million imported wine drinkers<sup>1</sup>, we used Vinitrac® China - our online wine drinker survey - to target a representative sample of consumers aged 18 to 50 in China's three largest cities Beijing, Shanghai, Guangzhou, plus Wuhan to represent wine-drinking in Tier 2 cities
- We ensured that the sample was representative by using quotas and post-weighting based on age, gender and location, determined through a calibration survey
- Please see the following slide for details on respondent criteria



# Research methodology: Sampling and quotas used for Vinitrac® China



- The data for this study was collected in July 2011
- Data was gathered via Wine Intelligence's Vinitrac® online survey of 1,017 Chinese imported wine drinkers, meeting the following requirements:
  - Upper middle class (personal income of at least 4,000 RMB per month)
  - 18-50 years old
  - Resident of Beijing, Guangzhou, Shanghai, Wuhan
  - 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 upper middle class imported wine drinkers in these 4 cities in terms of age, gender and geography



# How we define internet and social media in the context of wine information



Our survey explored how respondents use the following online and traditional sources in the context of wine information:

## Online sources of wine information

### Internet

(websites through which consumers passively access information)

- Wine information websites
- Wine producer/brand website
- Wine region/country websites
- Wine merchant websites
- Online shopping websites
- Online encyclopaedia
- Newspaper or magazine websites
- Supermarket websites
- Search engines

### Social media

(platforms through which consumers interact with one another)

- Microblogs
- Social networking websites
- Friend/family's blogs
- Wine experts' blogs
- BBS forums

## Traditional sources of wine information

Word of mouth { Friends, family or colleagues

Shop staff { Shop staff in wine merchant  
Supermarket staff

Television or radio { Television  
Radio

Wine guides { Wine guide/book

Printed media { Newspapers  
Lifestyle/cooking magazines

In-store information { In-store shelf signs





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