



# CHINA LABEL DESIGN REPORT 2015

June 2015



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# Introduction

As consumers, we're inclined to underplay the influence label design has on our wine-buying decisions. More rational information - varietal, brand, recommendations, origins, and promotions – all seem more important to us as we post-rationalise our shopping patterns. But as marketers, we know getting a wine label right is more important than ever for successful sales performance.

When it comes to wine label design for China, brands tend to use lots of gold colouring, detailed and complex font styles, along with the image of chateaux or vineyards. It looks traditional, authentic and French (the default origin where good quality wine is made, at least to Chinese consumers).

When the market is saturated by wine labels with this French influence, does the design still have the same impact?

Together with wine label design specialists [Amphora](#), we developed labels to illustrate the core defining features of each category. These eight labels were then tested in our online survey and focus groups with over 1,000 Chinese drinkers of imported wine, to measure attractiveness, quality, price perceptions, likelihood to buy, occasion suitability, and imagery.

Our aim with this study was to identify which types of wine labels appeal most and why, thus enabling us to better inform decisions about product designs and brand positioning.

So what have we found?

The study shows that traditional-looking labels do not necessarily mean higher price or higher quality, as was believed in the past. On the contrary, the more contemporary, bold, and idiosyncratic designs work better. They are seen as special (and thus more expensive) and showing respect during formal/celebration occasions. The more thought-through designs are seen as translating into the care and attention that the producer has put into the wine. Moreover, they are easy to understand and recognise on the shelf.

## Introduction (cont.)

It is worth noting that the 'Modern Contemporary' and 'Eclectic' labels are gaining traction amongst Developing Drinkers (an emerging generation of consumers), as they believe that the taste and characteristics of the wine can be easily understood through the design and 'feel' of the labels. As this consumer group grows with the evolution of the market, these styles are expected to become more popular.

So, does it mean that we should discard the golden chateaux? Well, yes and no. Apart from the design, all wines should have clear quality cues and product information at the front to reinforce trust and authenticity. The 'Prestigious' label is the consistent top performer across measures, because it is seen as a safe choice and especially important during sharing occasions, because it is unlikely to be disliked. Besides, as we already know, Penfolds is the consistent top performer in the market with its classic, straight-forward brand focused label, where the brand itself stands for authenticity and quality.

We believe brands should make bold moves when designing wine label for China, but only after answering these questions:

1. Brand equity analysis – What is our brand equity? What should stand out from the front label? Do they stand for trust / authenticity?
2. Brand hierarchy positioning – Where should our brand stand? Premium, mid or mass market?
3. Market check – Which consumer segments should we target and what label information influence their decision?

Good luck with your label design!



Rui Su  
Senior Research Manager

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# Chinese wine consumers identify 8 main label categories



Based on research with Chinese consumers, we have identified the following 8 categories of design styles used by Chinese consumers to group and evaluate the wine labels.

Each design below represents a stylised label with the key characteristics of each category.



Eclectic

Modern contemporary

Prestigious

Modern vibrant

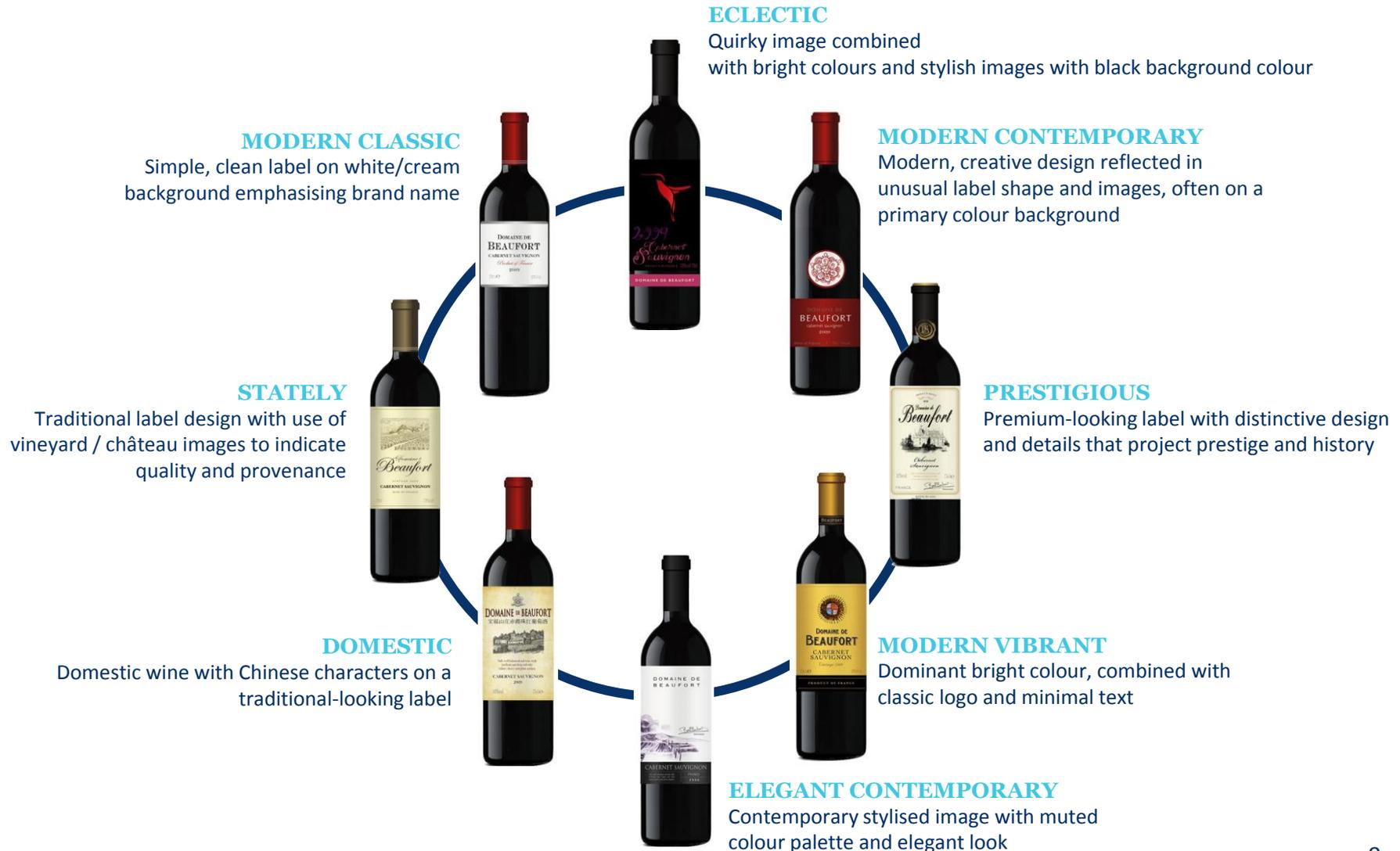
Elegant contemporary

Domestic

Stately

Modern classic

# Introducing the label categories



# Summary of quantitative test: Labels displayed in order of ranking

Higher attractiveness, quality perception, likelihood to buy and prices are expected from more idiosyncratic designs



Label name	Label tested	Label category description	Attractiveness	Quality	Likelihood to buy	Price expectation
Eclectic		Quirky image combined with bright colours with black background colour	1	1	1	Mid - high price
Modern contemporary		Contemporary stylised image with muted colour palette and elegant look	2	2	2	Mid - high price
Prestigious		Premium-looking label with distinctive design and details that project prestige and history	3	4	3	Mid price
Modern vibrant		Dominant bright colour, combined with classic logo and minimal text	4	3	4	Mid - high price
Elegant contemporary		Modern, creative design reflected in unusual label shape and images, often on a primary colour background	5	7	7	Mid - high price
Domestic		Domestic wine with Chinese characters on a traditional-looking label	6	5	5	Low price
Stately		Traditional label design with use of vineyard / chateau images to indicate quality and provenance	7	6	6	Mid price
Modern classic		Simple, clean label on white/cream background emphasising brand name	8	8	8	Low price

# Summary of quantitative & qualitative test



## Formal occasions



- The **most popular** but potentially **polarising** design.
- Seen as **special, stylish and distinguished**, to which the producer has put **additional passion and care**.



- Seen as **approachable** and has stronger affinity to Social Newbies.
- Frequent drinkers who are used to traditional wine labels tend to find it **special and interesting**



- Strongest in the **on-trade**.
- Most attractive to **highly-involved drinkers** who are open to try different wines
- And attractive to **Social Newbies** who rely on **strong identity cues** to choose wine



- Believed to have **thought-through** design, which can be translated into **good taste and quality**.
- Tends to attract **Developing Drinkers**, whose wine choices are led by taste.
- **Strong brand identity** provided by image usage and the story communicated through the label places this design to one of the **top choice for gifting**.



- **Popular** and the **least controversial** design.
- Chinese consumers nowadays are more familiar with wine in this design, and are more **comfortable** drinking this wine during **informal occasions**.
- Most appealing to **Social Newbies and Developing Drinkers** (lower confidence), who choose this design as a **safe choice**



- Although seen as **distinguished**, it is also strongly associated to being **conservative and dull**.
- More likely to be chosen as a **safe option**



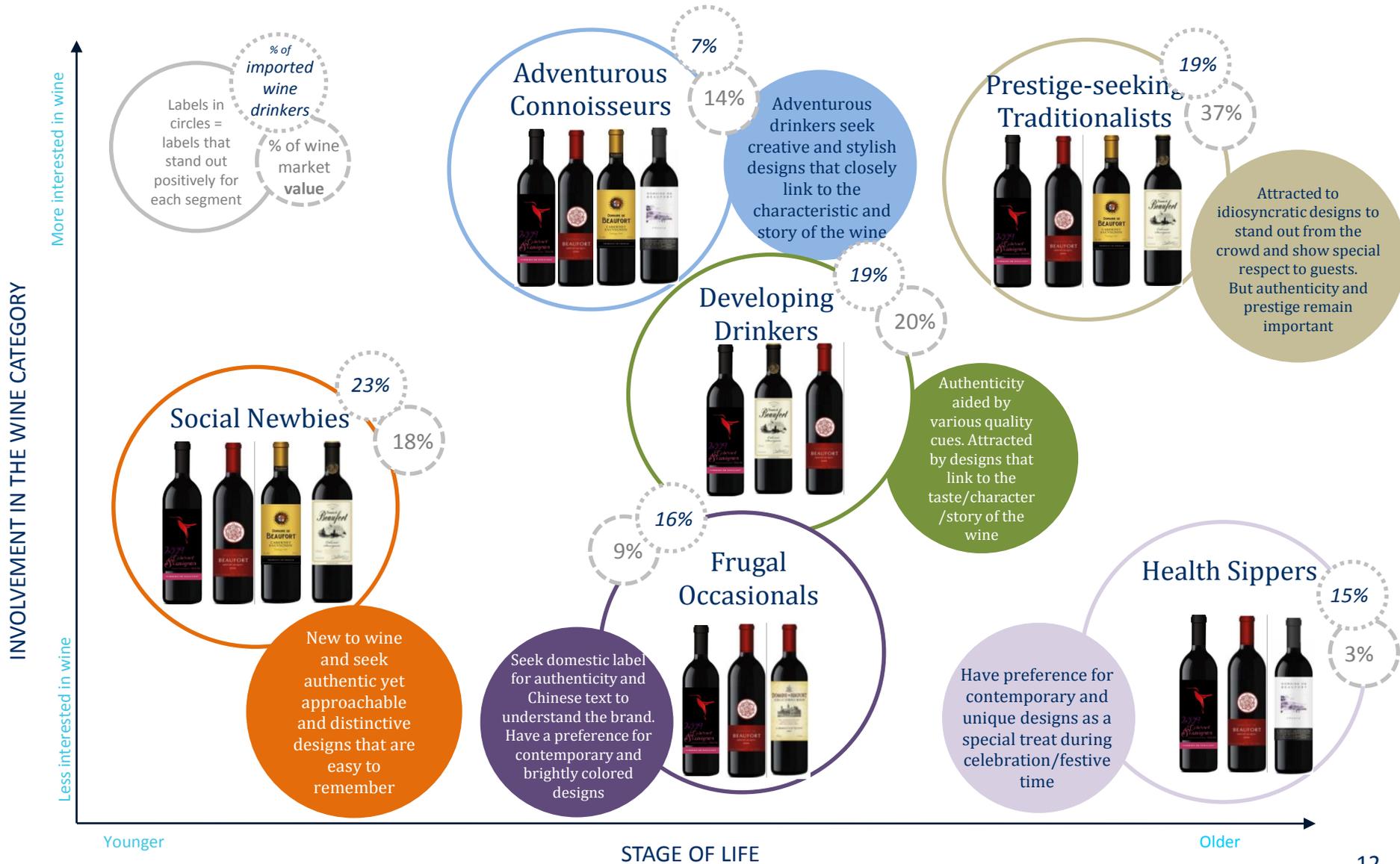
- Seen as **approachable** but **ordinary**.
- **Social Newbies** are more likely to buy it as a safe option.
- However, it **works well with well-known brands**
- Its **quality imagery can be improved** by adopting larger front label size, golden/black/off-white colour scheme or other quality indicators



- Seen as **approachable** and **reliable** by using **Chinese characters** in the front.
- Only appeal to drinkers with **lower engagement** with wine

## Informal occasions

# Although different consumer segments seek different values from labels, their top choices remain similar



\*Stand out labels selected based on qualitative overview of response to measures and relative positioning of label categories

# Visual cues could drive quality positioning in the front label



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## Modern, quirky image combined with bold colour

Examples



### Key characteristics

- Modern style
- Various designs, often with fun or stylish image
- Eye-catching and distinctive
- Limited use of text
- Imagery: quirky, bold, fun, New World, eye-catching, well thought, stylish, creative

Design element	Typical characteristics used within category
Colour	Bright colours contrasted with more neutral blacks, creams or golds
Rendering	Non-photorealistic rendering, modern, stylised images
Image	Stylised images of a variety of subjects such as animals, scenery, modern art
Typography	Variety of serif and sans-serif fonts, variety of sizes and colours
Text	Minimal use of text, with emphasis on single message on label, e.g. brand name or varietal

The most popular but potentially polarising design with mid-high price positioning. Seen as special, stylish and distinguished, to which the producer has invested additional passion and care.

**Attractiveness:** ranks 1<sup>st</sup> (out of 8 total tested)

**Perceived quality:** ranks 1<sup>st</sup>

**Likelihood to buy:** ranks 1<sup>st</sup>

**Expected price:** mid-high price (¥300+)

**Suitable occasions:** Strongest with formal occasions

- During business lunch/dinner or gifting
- Celebrating a special occasions at home
- With a more formal meal in a restaurant
- At a party/celebration/big night out

Popularity,  
Expected  
Price &  
Occasions

### Appealing to...Portrait segments



Social Newbies



Developing Drinkers



Prestige-seeking  
Traditionalists

### What consumers said about this category

Reserved  
Elegant  
**Passionate**  
Fashionable  
Distinguished  
Caring  
Sexy  
Approachable  
Calm/Steady



It is a combination of wine and art. It is not only attractive but adds value to the wine beyond the wine itself. I can tell from the wine that the winemaker has put a lot of effort in making it. I believe it tastes good and it will be of good quality.  
*Adventurous Connoisseur*

### STRENGTHS

- ✓ Fun and “cool”
- ✓ Eye-catching
- ✓ Adventurous choice
- ✓ Might be “cult wine” with small but devoted following
- ✓ More attention and care put into the design



### WEAKNESSES

- ✗ Concern that focus of wine is on design rather than the wine itself.=
- ✗ Bold design can be polarising, risks alienating some consumers.=
- ✗ If not done properly , could look cheap and low quality; therefore it requires more care during the design process to achieve positive results.

# Modern contemporary

Modern, creative design reflected in unusual label shape and images, often on a primary colour background



Examples



## Key characteristics

- Distinctive and creative
- Unique details (such as unusual label shape) provide strong memory cues and adds personality to brand identity
- Primary colour palette drawn from narrow “wine-appropriate” range, providing unique characteristics while maintaining elegance
- Mainly associated with New World wine, but could be Old World wine with “modern” marketing strategy
- Imagery: Contemporary, memorable, interesting, strong identity

Design element	Typical characteristics used within category
Colour	Primary colours (black, red, white) to convey elegant feel
Rendering	Non-photorealistic rendering, modern-looking images
Image	Emphasise uniqueness through unusual images, label shapes or packaging types, e.g. torn, warped label shape, unusual bottle shape, unusual patterns on label, modern images of a variety of subjects such as animals, etc
Typography	Variety of serif and sans-serif fonts
Text	Minimal use of text, emphasis on brand name

# Modern contemporary



Popular design for mid-high price positioning. Seen as approachable and outgoing with a strong affinity to Social Newbies. Seen as special by frequent drinkers who are used to traditional wine labels.

**Attractiveness:** ranks 2<sup>nd</sup> (out of 8 total tested)

**Perceived quality:** ranks 2<sup>nd</sup>

**Likelihood to buy:** ranks 2<sup>nd</sup>

**Expected price:** strongest at mid-high price (¥200-499)

**Suitable occasions:**

- Versatile – suitable for a range of occasions.
- Strongest suitability for business lunch/dinner or formal occasions as a face-enhancing treat, due to the less common design.
- It is also associated with informal home consumption - compared to other designs, consumers are more likely to choose this while relaxing at home.

Popularity, Expected Price & Occasions

**Appealing to...Portrait segments**

Also more likely to attract Adventurous Connoisseurs than other designs

**What consumers said about this category**

Approachable  
Reserved  
**Distinguished**  
Passionate  
Elegant  
Outgoing  
Attractive

**STRENGTHS**

- ✓ Unique and distinctive
- ✓ Seen as interesting and creative
- ✓ Stands out on shelf
- ✓ Easy to recognise and remember



**WEAKNESSES**

- ✗ If not done properly, may look too complicated and 'over-designed'
- ✗ Fewer quality cues than more traditional label designs



Normal wine labels have white background. This one is in black with red images of a kangaroo. It is different but elegant. It has its specialty. It is a gift from a friend from Australia. I will drink it with friends, to share the wine and talk about fun things he experienced during his trip in Australia.  
*Social Newbie*

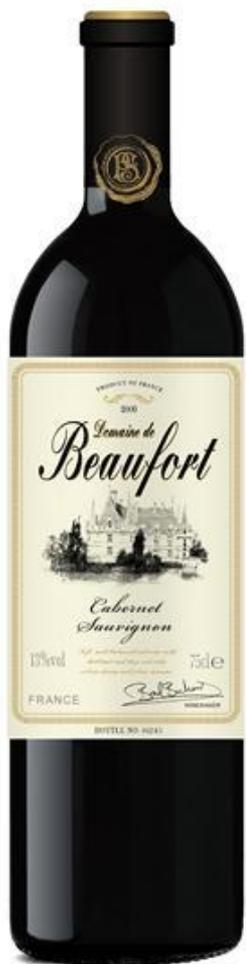
Wine label with image can bring you the feeling or atmosphere when you drink the wine.  
*Developing Drinker*

It looks energetic but also distinguished and high quality.  
*Prestige-seeking Traditionalist*



# Prestigious

Premium-looking label with distinctive design and details that project prestige and history .



## Key characteristics

- Luxury feel created through quality of paper, font style, and imagery that matches traditional wine expectations
- Tells a story about wine-making heritage through a unique and distinctive label design
- Details such as gold colouring, pale background, and embossment on bottle evoke perceptions of high-quality, aged wine
- Imagery associations: Prestigious, noble, solemn, royal, historic, but can be ordinary and dull as the market is saturated with similar designs

## Examples



Design element	Typical characteristics used within category
Colour	Generally use pale colour as background but with touch of metallic colouring or embossment, particularly gold
Rendering	Images evoking oil paintings, sketches, ink paintings etc. in artistic / fine art style
Iconography	Embossment on the bottle neck and 'seal' as part of foil; coat of arms
Typography	Cursive and formal font styles, often less-used fonts (e.g. Kunstler Script, Blackadder) to support the artistic touch
Text	Use of native languages (Spanish/French etc) written with traditional cursive fonts, viewed by consumers as an 'image' or 'decoration' rather than conveying information about the wine

# Prestigious

Popular and least controversial design. Chinese consumers are now more familiar with this design, and are more comfortable drinking this wine during informal occasions. Appealing to Social Newbies and Developing Drinkers (lower confidence), who are more likely to go for a traditional label to ensure quality.



**Attractiveness:** ranks 3<sup>rd</sup> (out of 8 total tested)

**Perceived quality:** ranks 4<sup>th</sup>

**Likelihood to buy:** ranks 3<sup>rd</sup>

**Expected price:** seen as mid priced (¥50-200). However, many first growth Bordeaux brands are in this design, which lead to a higher expected price.

### Suitable occasions:

- Suitable for a range of occasions.
- Most relevant to business meals, formal meals/celebrations in a restaurant or at a party/big night out, where showing 'face' and respect are important.
- As more low-priced wines are now using this design, consumers are more comfortable buying wine in this design for informal home consumption

Popularity, Expected Price & Occasions

### Appealing to...Portrait segments



Social Newbies



Developing Drinkers



Prestige-seeking Traditionalists

### What consumers said about this category

Distinguished  
 Approachable  
 Fashionable  
 Dull/Ordinary  
 Cold  
 Gentle  
 Reliable  
 Stern  
 Elegant  
 Sincere

### STRENGTHS

- ✓ Looks high quality and expensive
  - ✓ Fine and rare wine made by wineries with heritage and high status
- ✓ A story to tell behind the brand
- ✓ Potential of value appreciation in the future



### WEAKNESSES

- ✗ High price, not affordable
- ✗ Not easy to understand, requires knowledge when choosing

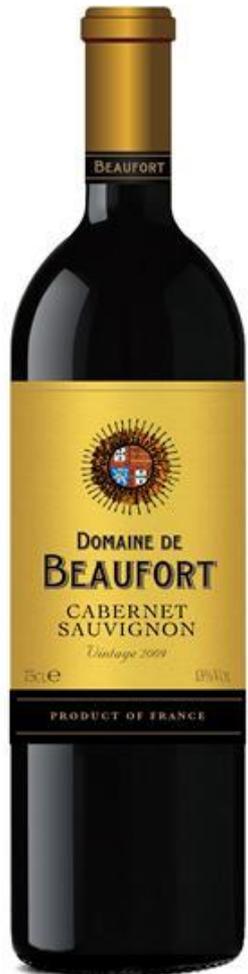


This is a **French** dry wine. The **golden** bronzing looks really **appealing**. It is **elegant** and **refined**...It costs me 200RMB. And you can buy it from the higher-end supermarkets. Suitable for the white collar who is seeking high standards and refinement in life.  
*Developing drinker*

### Key characteristics

- Bold use of one dominant bright colour
- Overall traditional / classic feel to the style and structure of the label
- Highlights brand name through large font size or contrasting font colour
- Associated with New World wines
- Imagery: colourful, simple, passionate, New World, easy to drink

### Examples



Design element	Typical characteristics used within category
Colour	Bright, bold use of one main colour that dominates the label, often with touch of metallic colouring to add a more premium feel
Rendering	Stamped images, sketches
Image	Abstract logo (e.g. star, sun)
Typography	Combination of both serif and sans serif fonts
Text	Text used to establish the traditional balance of the label – varietal, region/country and brand name clearly stated with occasional extra detail e.g. in native language

# Modern vibrant



Strongest in the on-trade. Most attractive to highly-involved drinkers who are open to try different wines and Social Newbies who rely on strong identity cues to remember the wine they like.

Popularity,  
Expected  
Price &  
Occasions

- Attractiveness:** ranks 4<sup>th</sup> (out of 8 total tested)
- Perceived quality:** ranks 3<sup>rd</sup>
- Likelihood to buy:** ranks 4<sup>th</sup>
- Expected price:** strongest at mid-high price (¥200-499)
- Suitable occasions:**
  - Most suitable for on-trade occasions - business lunch/dinner or party/celebration/big night out at bar/café/club/karaoke.

**Appealing to...Portrait segments**



Social Newbies



Prestige-seeking  
Traditionalists

### What consumers said about this category

Reliable <sup>Happy</sup>  
 Passionate **Caring**  
 Elegant <sup>Powerful</sup> <sup>Approachable</sup>  
 Ordinary <sup>Fashionable</sup>  
 Distinguished

It uses bright color as the base, which is eye-catching. Compared to the normal labels that use complex font and lots of text to show the origin, vintage etc., I prefer the more straight-forward design.  
*Social Newbie*

### STRENGTHS

- ✓ Simple and eye-catching
- ✓ Colourful and cheerful
- ✓ Easy to drink/understand
- ✓ Clearly stated brand name, easy to recognise



### WEAKNESSES

- ✗ Bold design can be polarising, risks alienating some consumers

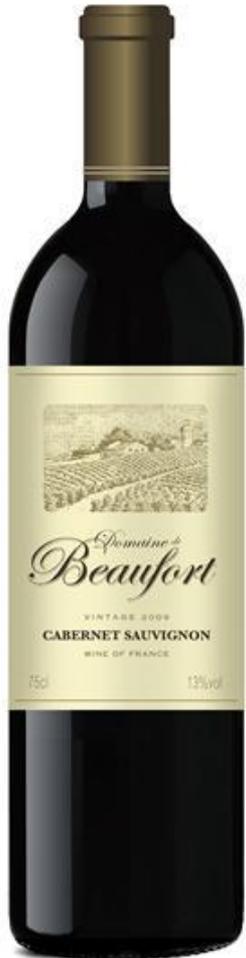


## Traditional label design with use of vineyard / château images to communicate quality and provenance

### Key characteristics

- Conservative, “Old World” feel
- Strong association with wine-making tradition
- Depictions of vineyards, châteaux and other symbols communicate provenance and suggest authenticity
- Stress on vintage year linking to quality and high price
- Conforms to expectations for traditional label style, lacks the stand-out uniqueness and luxury cues of “Premium” labels
- Imagery: Traditional, classic, reserved, authentic, trustworthy, but gradually being seen as ordinary and dull due to market overloaded with similar designs

### Examples



Design element	Typical characteristics used within category
Colour	Neutral colour palette of creams, often with accents of yellow or red
Rendering	Delicate line drawings/sketches
Image	Traditional-looking vineyard and/or châteaux images, often highlighting vintage year on the label
Typography	Predominantly black, serif fonts in a traditional cursive script
Text	Quantity of text relatively low, with château / estate name dominating and more emphasis placed on the image; use of region/country and native language

Low popularity with low-mid expected price. Although seen as distinguished, it is also strongly associated with being conservative and dull. Likely to be chosen as a safe option.

**Attractiveness:** ranks 7<sup>th</sup> (out of 8 total tested)

**Perceived quality:** ranks 6<sup>th</sup>

**Likelihood to buy:** ranks 6<sup>th</sup>

**Expected price:** mostly placed at mid price (¥50-299).

**Suitable occasions:**

- Suitable for a range of occasions.
- Most relevant to business meals and formal meal/celebration in a restaurant as it is seen as a safe option
- Compared to other designs, consumers are also more likely to consume this wine with informal meals in restaurants or at home, or as a drink before bed.

Popularity,  
Expected  
Price &  
Occasions

**Appealing to...Portrait segments**



Social Newbies



Prestige-seeking  
Traditionalists



Health Sippers

**What consumers said about this category**

**Gentle Reserved**

Optimistic **Distinguished** Approachable  
Passionate Ordinary/Dull

**STRENGTHS**

- ✓ Associated with trusted French wine producers
- ✓ “Authentic” wine from a traditional origin
- ✓ Safe choice, with confidence in wine quality built through classic and low-key design



**WEAKNESSES**

- ✗ Style often used by counterfeit or knock-off wines
- ✗ Homogenous design, difficult to distinguish brands and producers
- ✗ Less eye-catching, can be seen as dull



The label is dominated by foreign language, which looks high-end  
*Prestige-seeking Traditionalists*

It is very common, nothing special.  
*Prestige-seeking Traditionalists*

# Elegant contemporary

Contemporary stylised image with muted colour palette and elegant look



## Key characteristics

- Well-designed, stylish, elegant, often with simple image/drawing on the label
- Strong brand identity provided by image usage and the story communicated through the label
- Simple, light colour palette, primarily on muted colour background
- Associated with New World wine
- Imagery: elegant, artistic, unique, tasteful, design-focused

## Examples



Design element	Typical characteristics used within category
Colour	Varies, primarily light colours aimed at conveying the elegant and artistic image
Rendering	Simple line drawings, sketches, watercolour-style paintings
Image	Emphasis on artistic, tasteful images, often with landscapes, profiles of people etc.
Typography	Predominantly black, with use of italics and serif fonts
Text	Minimal use of text, with clearly visible brand name

# Elegant contemporary

Believed to have thought-through design, which implies good taste and quality. Tends to attract Developing Drinkers, whose wine choices are led by taste.



**Attractiveness:** ranks 5<sup>th</sup> (out of 8 total tested)

**Perceived quality:** ranks 7<sup>th</sup>

**Likelihood to buy:** ranks 7<sup>th</sup>

**Expected price:** strongest at mid-high price range (¥200-499)

## Suitable occasions:

- Strongest at gifting - partly due to the less common and detailed designs
- Strong for informal occasions - partly due to the association to good taste implied by the effort put into the label design

Popularity,  
Expected  
Price &  
Occasions

## Appealing to...Portrait segments



Social Newbies



Developing Drinkers



Frugal Occasionals

## What consumers said about this category



## STRENGTHS

- ✓ Thought-through design demonstrates care and effort invested by producer, which is viewed as indicative of high quality
- ✓ Appealing story behind the brand
- ✓ Can help consumer demonstrate confidence in wine category by going beyond "Old World" label styles



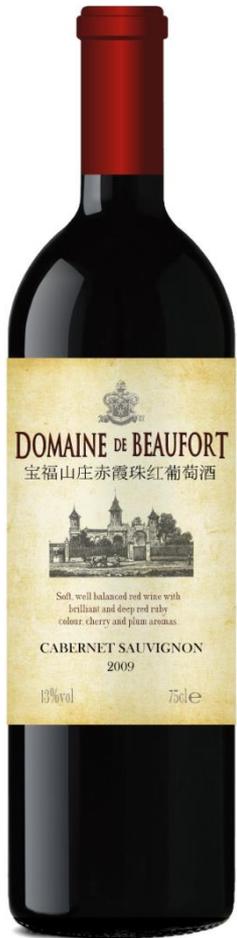
## WEAKNESSES

- ✗ Might not be the top choice for conservative consumers with less confidence in the category, who use more traditional label categories as a quality cue

They are all wines of Pierre Gaillard. The wine labels are oil paintings. So beautiful. I like this type of label because it is different to many traditional matte coloured wine labels (esp. many Bordeaux wine uses). They all look the same. Good wines on earth are as many as sands in Ganges. For many normal consumers, an attractive wine label can be crucial to motivate them try a new wine.

*Adventurous Connoisseur*





### Key characteristics

- Chinese characters on front label
- Traditional, Old World wine look
- Design elements varies: typically use either French-style châteaux / vineyards or Chinese elements
- Cream/white colour
- Imagery: conservative, traditional, “imitation”

### Examples



Design element	Typical characteristics used within category
Colour	Neutral colour palette of creams, often with accents of black and red
Rendering	Line drawings/sketches
Image	Traditional-looking vineyard and/or chateau images, often use coat of arm to strengthen the European look
Typography	Chinese characters typically in “Song” typeface, English in basic serif and sans serif fonts
Text	Chinese characters emphasise brand name, grape varieties and wine colour; English typically translated from original Chinese text

# Domestic

Low priced positioning. Appeal to drinkers with lower engagement with wine.



**Attractiveness:** ranks 6<sup>th</sup> (out of 8 total tested)

**Perceived quality:** ranks 5<sup>th</sup>

**Likelihood to buy:** ranks 5<sup>th</sup>

**Expected price:** low price range (<¥100)

**Suitable occasions:**

- Sipping at home for health reasons
- Celebrating special occasions/inviting guests home for dinner when drinking wine seems necessary for the occasion

Popularity,  
Expected  
Price &  
Occasions

### Appealing to...Portrait segments



Social Newbies



Health Sippers



Frugal Occasionals

### STRENGTHS

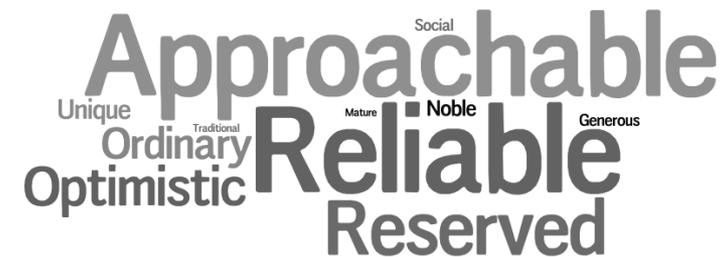
- ✓ Clean and simple
- ✓ Provides sufficient and useful information
- ✓ Easy to choose
- ✓ Brands are well-known and consistent



### WEAKNESSES

- ✗ Concerns over quality
- ✗ Not good value for money
- ✗ Consumers who identify themselves as imported wine drinkers often want to distance themselves from the domestic category

### What consumers said about this category



Source:

Wine Intelligence, Vinitrac® China, April '15 (n=1,001), aged 18-54 urban upper middle class drinkers of imported wine

Wine Intelligence qualitative research – 2 focus group in Shanghai & 1-week online discussion forum with n=36 Chinese upper middle class drinkers of imported wine in Beijing and Shanghai

## Modern classic

Simple, clean label on white/cream background emphasising brand name



### Key characteristics

- Modern 'feel' without sacrificing classic influences
- Minimalistic design with few details other than basic information
- Highlights brand name through large font size or contrasting font colour
- Associated with New World wine
- Imagery: modern, simple, minimalist, New World, big brands, mainstream

### Examples



Design element	Typical characteristics used within category
Colour	Limited colour palette; predominantly white label with black, often with the additional use of red colour to emphasise key information
Rendering	Rarely used
Image	Very few images used
Typography	Mainly black font, but some use of brighter accent colours (typically highlighting the brand name). Serif fonts, some use of italics, capital letters and numbers
Text	Text only presents most important information; wine name is very dominant

## Modern classic

Approachable but ordinary design. Social Newbies are more likely to buy it as a safe option. However, it works well with well-known brands and its quality perception can be improved by adopting larger front label size, golden/black/off-white colour scheme, or other quality indicators.



Popularity,  
Expected  
Price &  
Occasions

**Attractiveness:** ranks 8<sup>th</sup> (out of 8 total tested)

**Perceived quality:** ranks 8<sup>th</sup>

**Likelihood to buy:** ranks 8<sup>th</sup>

**Expected price:** strongest at low price range (<¥50)

**Suitable occasions:** With informal meal at home

**Improvements on quality cues:** can be assisted by better use of off-white background, larger front label size, gold & black elements, brand/award icons/stamps or other quality indicators.

### Appealing to...Portrait segments



Social Newbies

### What consumers said about this category

The label is clean and clear. Easy to recognise the brand, the information and the brand icon. It looks distinguished.  
*Prestige-seeking Traditionalists*

It is ordinary. For older people.  
*Prestige-seeking Traditionalists*

Distinguished    Elegant    Ordinary/Dull  
**Approachable**  
Reserved    Attractive    Straight-forward

The Penfolds labels are easy to remember and recognise. I think only consumers who have experienced and some knowledge about wine can recognise its value.  
*Adventurous Connoisseurs*



### STRENGTHS

- ✓ Clean and simple
- ✓ Provides sufficient and useful information
- ✓ Easy to choose
- ✓ Works well with well-known, trustworthy brands



### WEAKNESSES

- ✗ White colour and small front label size are strongly associated to low quality wine
- ✗ Mainstream, mass market
- ✗ Few memory cues or reference points beyond brand name, which can be difficult for consumers to remember
- ✗ Few individual characteristics to aid stand-out appeal on shelf
- ✗ For consumers are less confident about their wine knowledge, they are likely to associate this design with cheaper wines

Source:

Wine Intelligence, Vinitrac® China, April '15 (n=1,001), aged 18-54 urban upper middle class drinkers of imported wine

Wine Intelligence qualitative research – 2 focus group in Shanghai & 1-week online discussion forum with n=36 Chinese upper middle class drinkers of imported wine in Beijing and Shanghai

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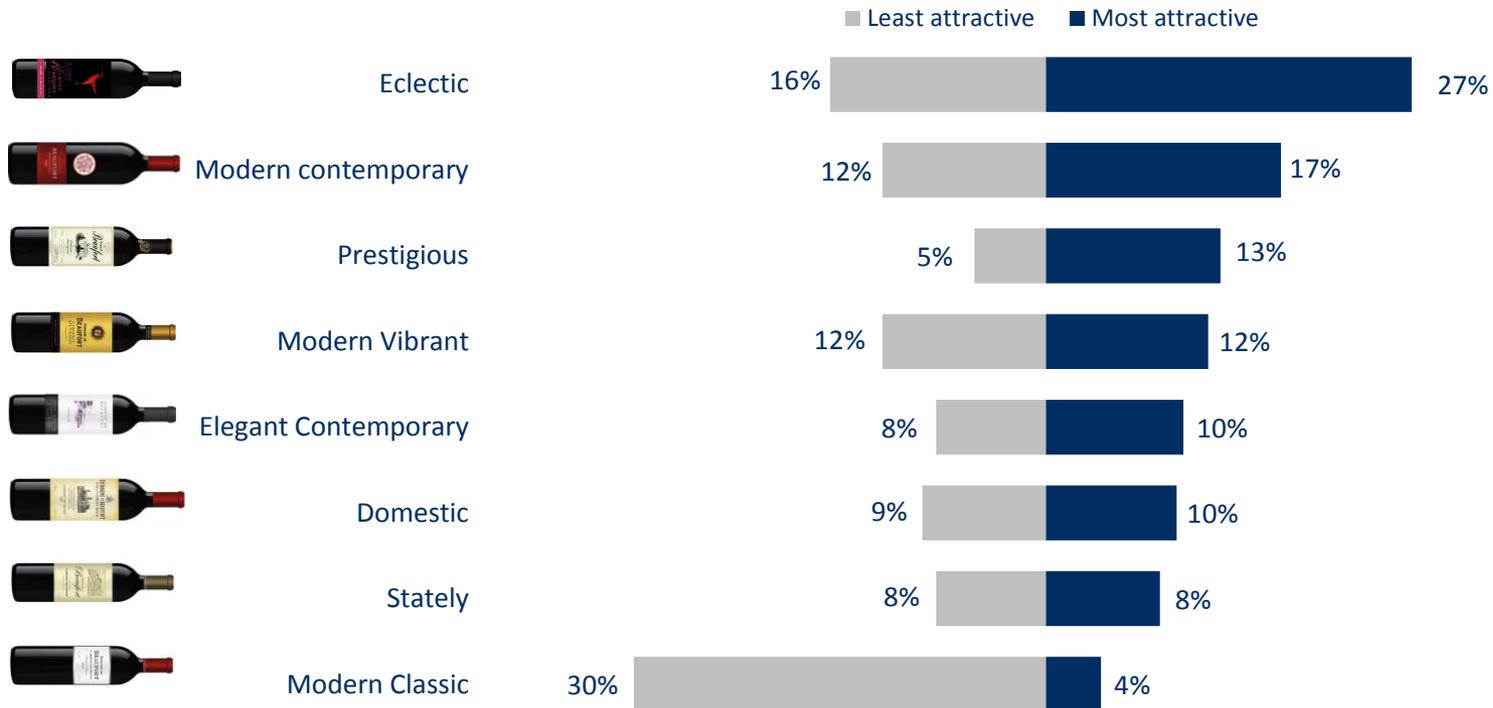
# Attractiveness



Idiosyncratic designs tend to be more attractive than the traditional and classic designs, but can be polarising. 'Prestigious' labels have high attractiveness and the lowest rejection. 'Modern Classic' is the most rejected label.

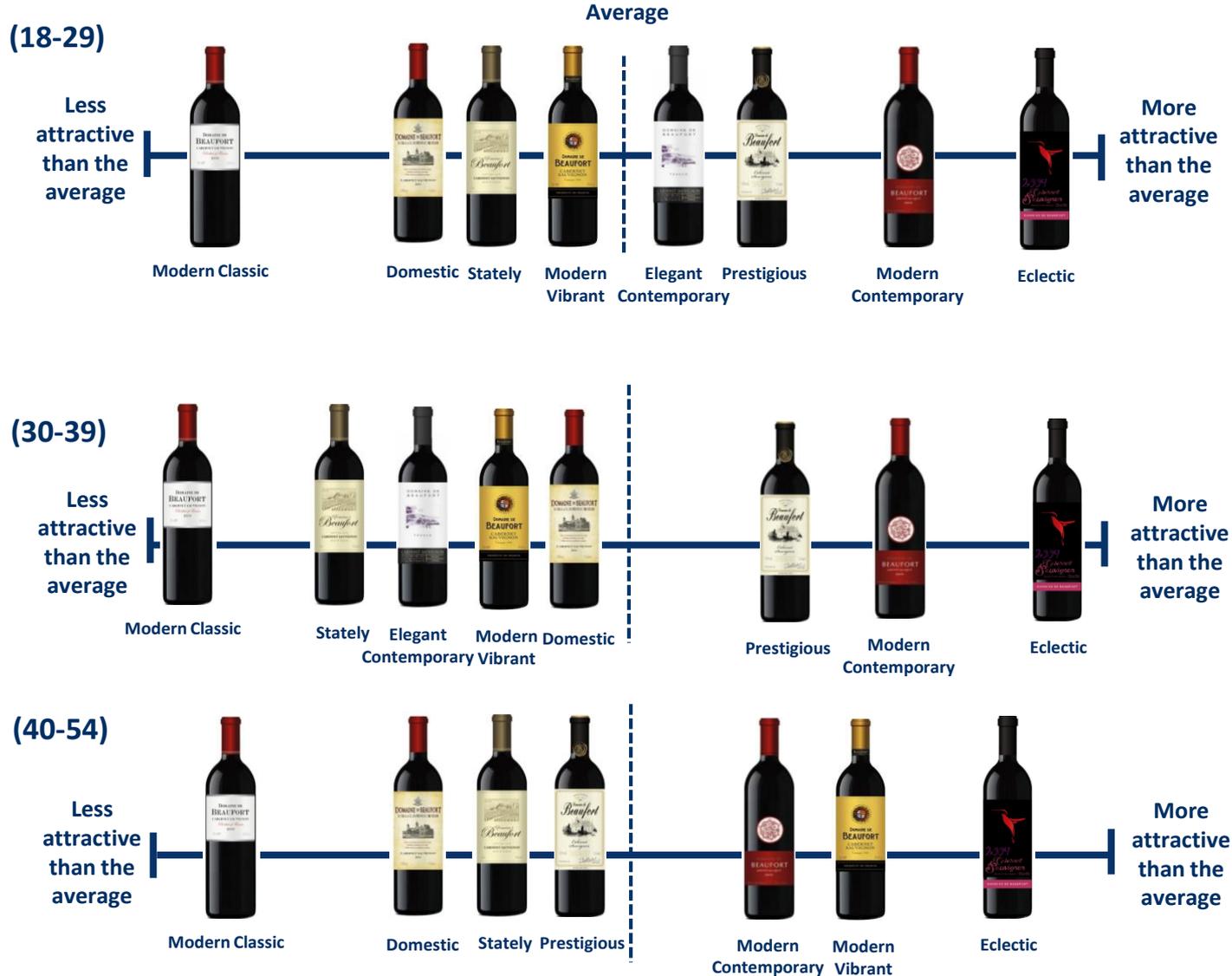
## Attractiveness

% selected the below labels as the 'most attractive' or the 'least attractive' label  
Base= Chinese drinkers of imported wine (n=1,001)



## Attractiveness of labels by age

Design-led packaging ranks high across age groups. Older drinkers (possibly more experienced in wine) are more likely to be attracted to the idiosyncratic packaging, while younger drinkers are less confident.



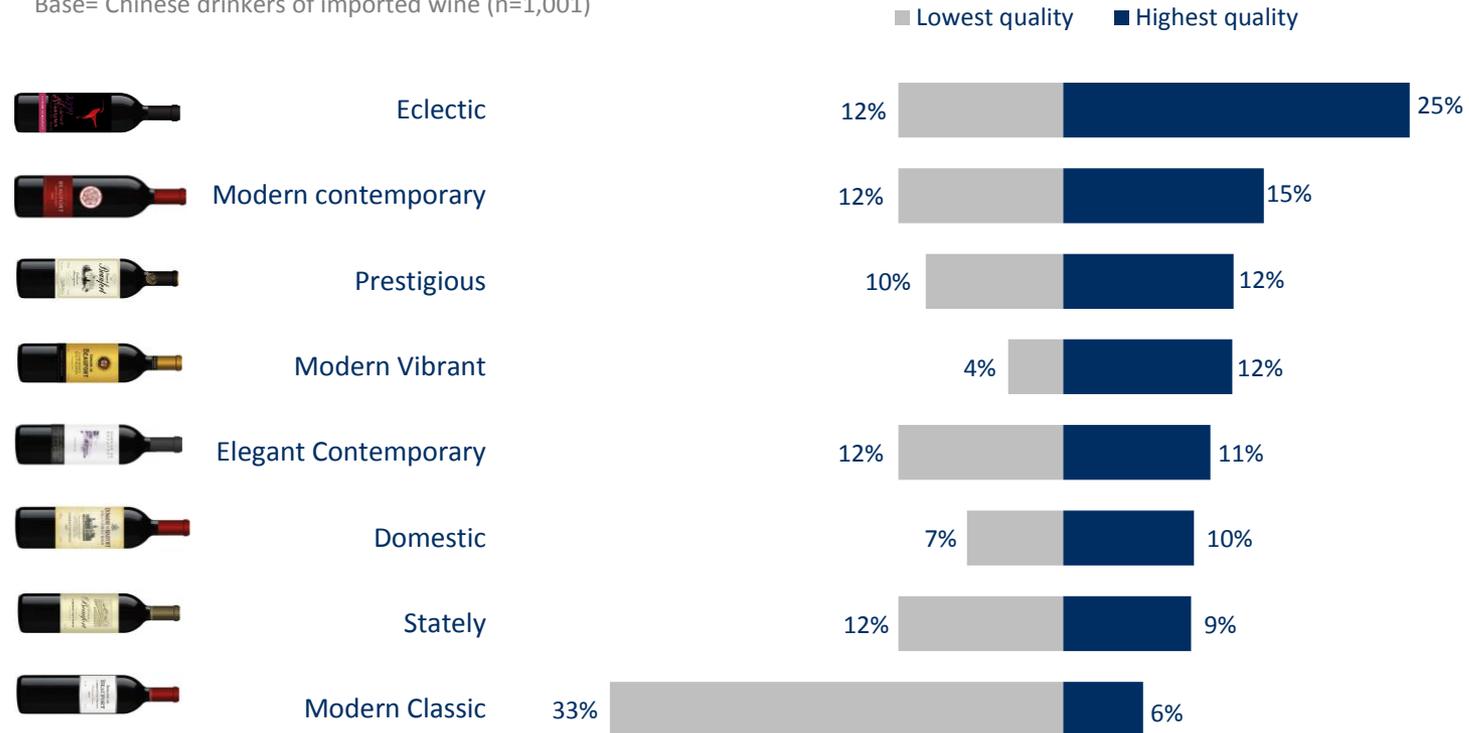
## Perceived quality

Similar ranking as attractiveness. Idiosyncratic designs have higher perceived quality than the classic designs. 'Modern classic' has the lowest perceived quality.



### Quality

% selected the below labels as the 'highest quality' or the 'lowest quality' label  
Base= Chinese drinkers of imported wine (n=1,001)



# Likelihood to buy

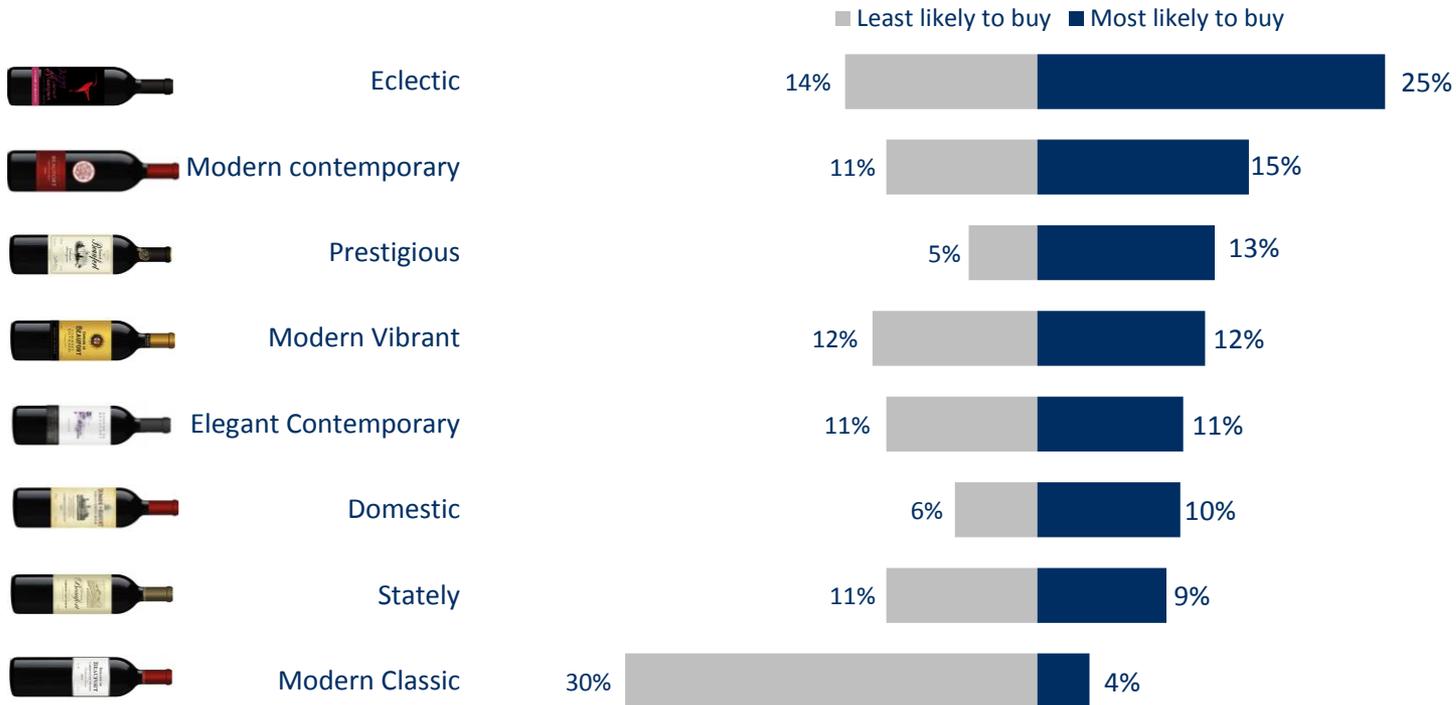
Higher likelihood to purchase for the idiosyncratic designs. 'Modern classic' has the lowest likelihood to purchase.



## Likelihood to buy

% selected the below labels as the 'most likely to buy' or the 'least likely to buy' label

Base= Chinese drinkers of imported wine (n=1,001)



## Perceived price

The higher the price ladder, the less traditional the design, whereas more design elements and idiosyncratic styles are expected.



### Top 3 most suitable label at each price range

% selected the below label suitable for each price range  
Base = all Chinese drinkers of imported wine (n=1,001)

### The most suitable label at each price range

Price range

500RMB	<ol style="list-style-type: none"> <li>1. Eclectic: 29%</li> <li>2. Modern vibrant : 15%</li> <li>3. Modern contemporary: 13%</li> </ol>
300-499RMB	<ol style="list-style-type: none"> <li>1. Modern contemporary: 20%</li> <li>2. Modern vibrant: 18%</li> <li>3. Eclectic: 16%</li> </ol>
200-299RMB	<ol style="list-style-type: none"> <li>1. Modern contemporary: 20%</li> <li>2. Modern vibrant: 17%</li> <li>3. Stately: 15%</li> </ol>
100-199RMB	<ol style="list-style-type: none"> <li>1. Stately: 17%</li> <li>2. Prestigious: 16%</li> <li>3. Modern contemporary: 16%</li> </ol>
50-99RMB	<ol style="list-style-type: none"> <li>1. Stately: 19%</li> <li>2. Modern contemporary: 15%</li> <li>3. Prestigious: 12%</li> </ol>
<50RMB	<ol style="list-style-type: none"> <li>1. Modern classic: 23%</li> <li>2. Modern contemporary: 16%</li> <li>3. Modern vibrant: 12%</li> </ol>



Mid-high price rang: modern label with special, edgy design elements are preferred

Low-mid price range: traditional, conservative and simple label designs are preferred

## Occasion suitability

- ‘Prestigious’ and ‘Stately’, which are common wine labels available in China, are most related to informal occasions or for business lunch/dinner.
- More idiosyncratic labels like ‘Modern contemporary’, ‘Modern vibrant’ and ‘Eclectic’ are strongest for business lunch/dinner.
- ‘Eclectic’, a less common design, is also strongly related to special occasions or gifting.
- ‘Elegant contemporary’ is strongest as a gifting choice.
- ‘Domestic’ and ‘Modern classic’ are more suited to off-trade occasions than other design styles tested.



## Occasion suitability

% selected the below occasions most relevant for consuming wines in the below packaging design

Base=those are most likely to buy wine in each of the following label



	Prestigious	Stately	Modern contemporary	Modern vibrant	Eclectic	Elegant contemporary	Domestic	Modern classic
A glass before bed	12%	16%	12%	9%	11%	14%	5%	15%
A relaxing drink at home	15%	16%	21%	11%	9%	21%	19%	18%
With an informal meal at home	25%	18%	9%	11%	10%	17%	5%	18%
When inviting guests home for dinner	21%	22%	20%	28%	28%	19%	33%	19%
Celebrating a special occasion at home (e.g. Chinese New Year, birthday etc.)	22%	21%	30%	22%	33%	19%	32%	20%
A gift	21%	17%	24%	23%	28%	33%	20%	27%
With an informal meal in a restaurant	21%	24%	13%	10%	11%	23%	17%	20%
With a more formal meal or celebration in a restaurant	38%	39%	34%	36%	36%	27%	36%	27%
An informal night out at a bar/café/club/karaoke	28%	12%	18%	19%	15%	21%	21%	23%
At a party/celebration/big night out bar/café/club/karaoke	14%	18%	23%	30%	22%	23%	21%	10%
During a business lunch or dinner	41%	40%	47%	48%	51%	34%	34%	21%
Other	0%	0%	0%	0%	1%	0%	1%	3%
None of the above	2%	0%	4%	2%	2%	3%	3%	5%

Grey shade: small sample size

Red: statistically significantly higher than three or more other labels at a 95% confidence level

Blue: statistically significantly higher than one or two other labels at a 95% confidence level

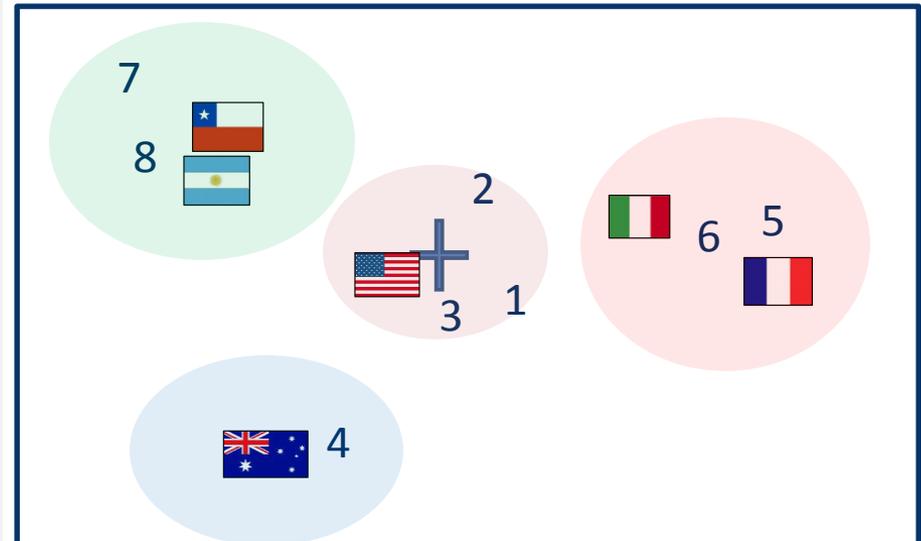
Source: Wine Intelligence, Vinitrac® China, April '15 (n=1,001), aged 18-54 urban upper middle class drinkers of imported wine

# How to read a “positioning map”

1. Positioning maps are graphical representations of the association between countries/brand/label and statements
2. They are a measure of relative strengths: a country can be the leader for all measures, however the map will show which measures really differentiate a country from the rest
3. The strength of the association is measured by how far the country and the value are from the centre
  1. E.g. USA, in the example map shown below, does not portray any distinctive associations as it is close to the centre
4. If two countries are close together it means that they have a similar profile in consumer minds

## EXAMPLE

1. USA is not a distinctive wine producing country as it's close to the centre.
2. Statements 1, 2 and 3 do not differentiate between countries.
3. Australia is distinctive and it differentiates itself from the other countries based on statement 4.
4. France and Italy have a similar profile. Statements 5 and 6 differentiate them from the rest
5. Chile and Argentina have a similar profile based on statements 7 and 8.



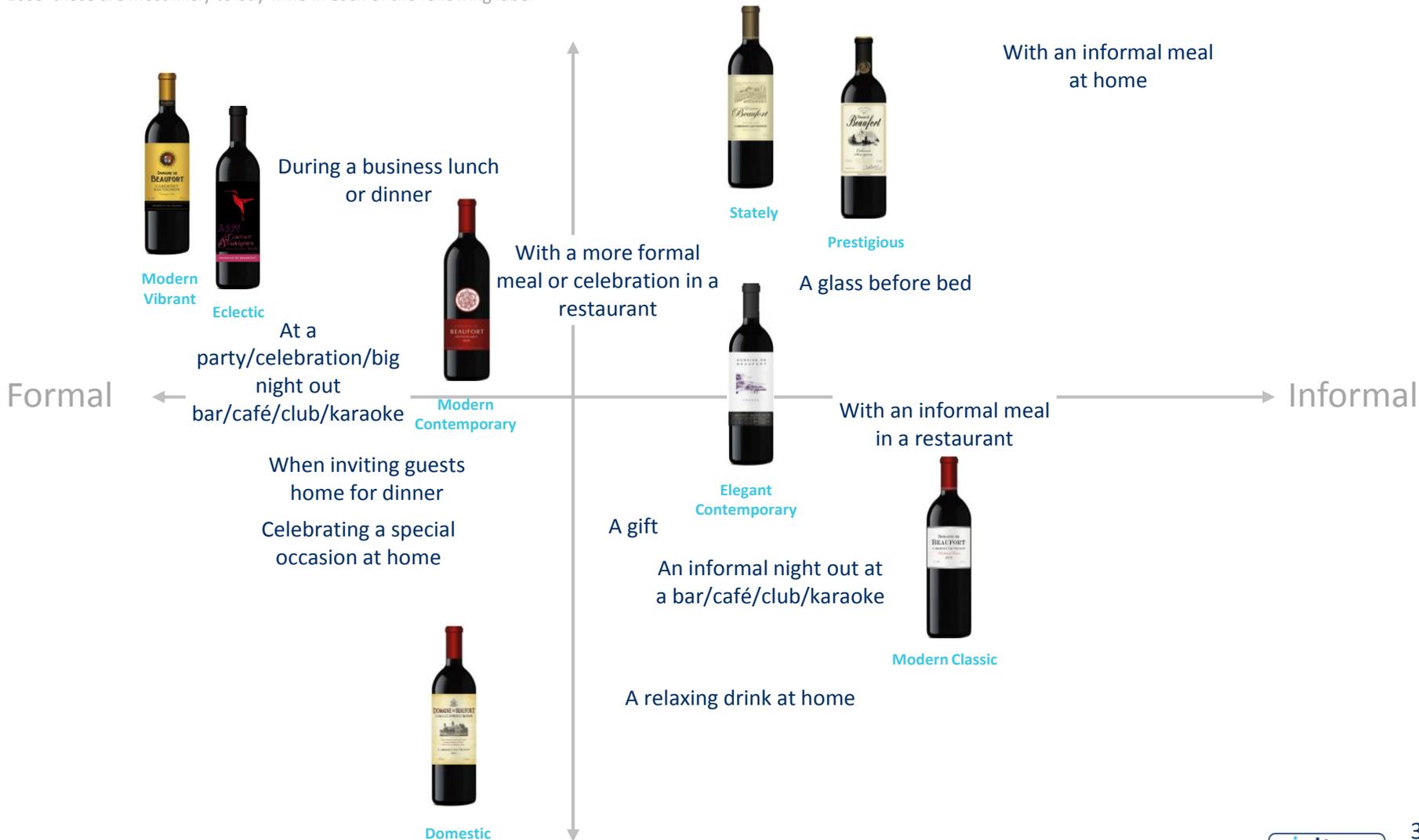
## Occasion suitability: Positioning map

Idiosyncratic labels tend to be associated with formal / special occasions, while the traditional and classic 'Old World' designs tend to be related to informal occasions



## Occasion suitability: positioning map

Base=those are most likely to buy wine in each of the following label



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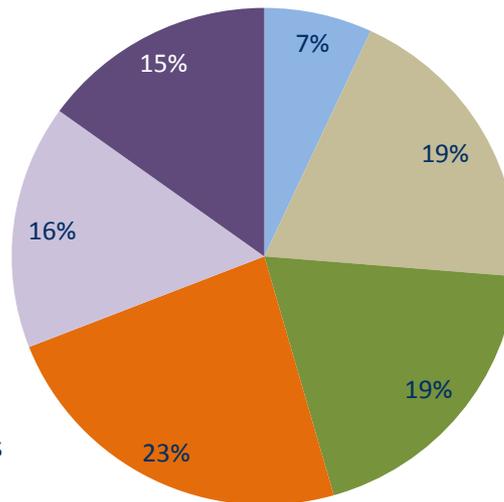
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# China Portraits: Overview

**Frugal Occasionals** are low-engagement, infrequent wine drinkers who drink wine mainly to celebrate special occasions and choose based on price.

**Health Sippers** are price-conscious wine drinkers with a narrow repertoire. Drink wine occasionally for its perceived health benefits.

**Social Newbies** are younger consumers who are new to the wine category. Just begin to learn about wine and see it as an interesting and social drink.



**Adventurous Connoisseurs** are high-spending, frequent wine drinkers who are confident in their wine knowledge and have a broad repertoire of source countries, regions, varietals and brands.

**Prestige-seeking Traditionalists** are conservative, high-spending consumers who particularly favour French wine, and choose imported wine because of the symbolisation of prestige and social status.

**Developing Drinkers** are consumers developing a habit of drinking wine because they like the taste. Growing interest in wine and beginning to see wine as important in their life.

% of population of Chinese urban upper-middle class imported wine drinkers  
 Base=All Chinese urban upper-middle class imported wine drinkers (n=2,029)

# China Portraits: Estimating market size



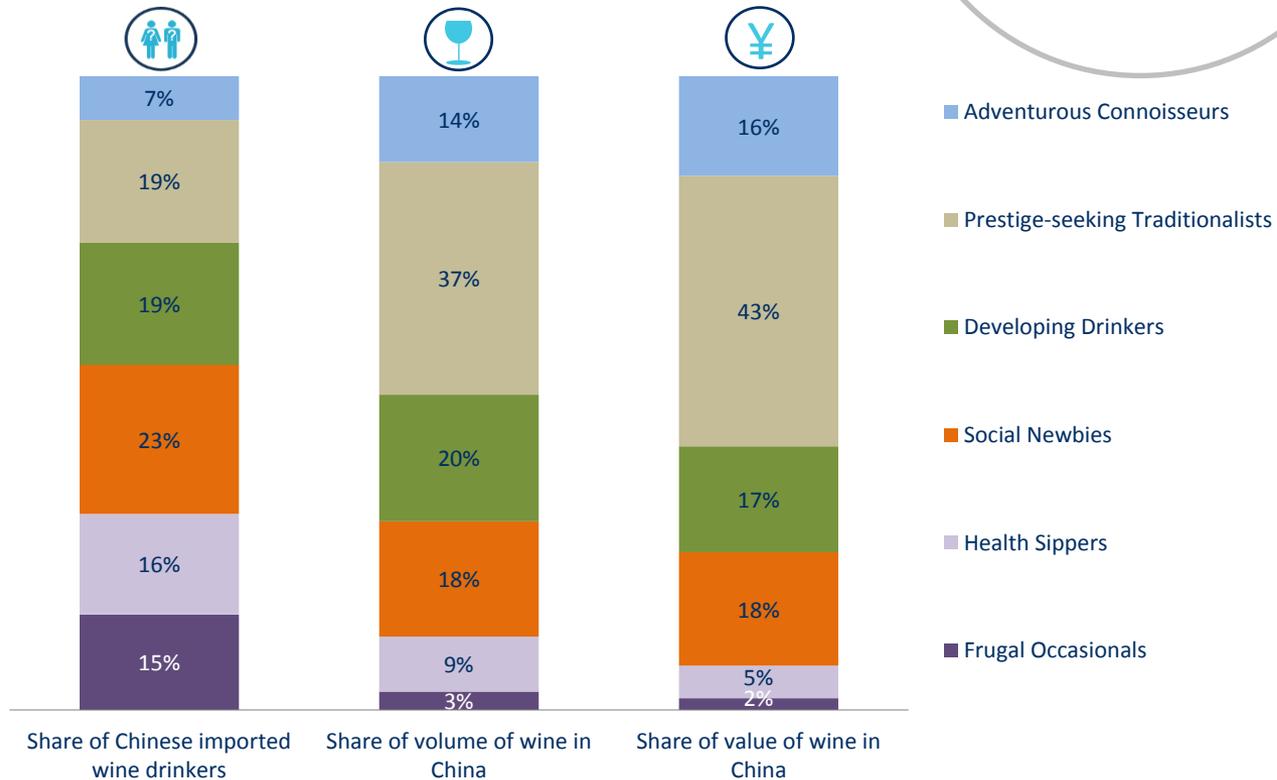
Full report on  
CHINA PORTRAITS 2015

[Available in the Reports Shop](#)

Learn how to target each Portrait segment

## Share of population, market volume and value

Share of volume and value are calculated based on self-reported wine consumption frequency and spend  
Base=All Chinese urban upper-middle class imported wine drinkers (n=2,029)



■ Adventurous Connoisseurs

■ Prestige-seeking Traditionalists

■ Developing Drinkers

■ Social Newbies

■ Health Sippers

■ Frugal Occasionals

# Adventurous Connoisseurs & label preference



## What do they want from labels

### 1. Authenticity, aided by clear information

I evaluate multiple factors to decide which wine to buy. So I will look for appealing label design, but also region, grape variety and price.  
*Adventurous Connoisseurs*

### 2. Unique attractiveness



This label catches my eyes. I can tell the producer's taste about art from his wine. He cares about his wine in every details.  
*Adventurous Connoisseurs*

### 3. Attention to details



The front label paper feels thicker and heavier. It feels distinguished.  
*Adventurous Connoisseurs*

### 4. Images/cues linking to the characteristics / story of the wine



My hobby is to draw wine labels that I like. This one is about the ban of Gin drinking in London  
*Adventurous Connoisseurs*



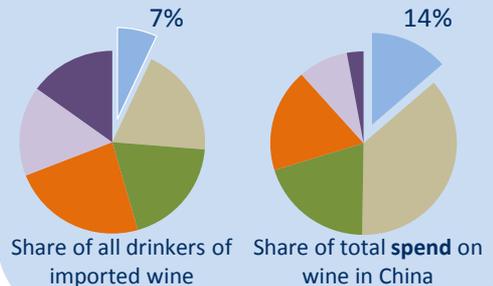
The beauty of label design is a reflection of how tasty and aromatic the wine is.  
*Adventurous Connoisseur*

Entry-level priced wines should use simple colour and designs. While more premium wines should have signature signs or images of a region, such as the highland in South America  
*Adventurous Connoisseurs*

## Top label categories



**Who are they:**  
High-spending, frequent wine drinkers who are confident in their wine knowledge and have a broad repertoire of source countries, regions, varietals and brands



# Prestige-seeking Traditionalists & label preference



## What do they want from labels

### 1. Authenticity, aided by clear information and quality cues



The label is clean and clear. Easy to recognise the brand, the information and the brand icon. It looks distinguished.  
*Prestige-seeking Traditionalist*

The label is clean and fresh.  
*Prestige-seeking Traditionalist*



### 2. Unique attractiveness for face-enhancing

### 3. Distinguished & prestigious touch

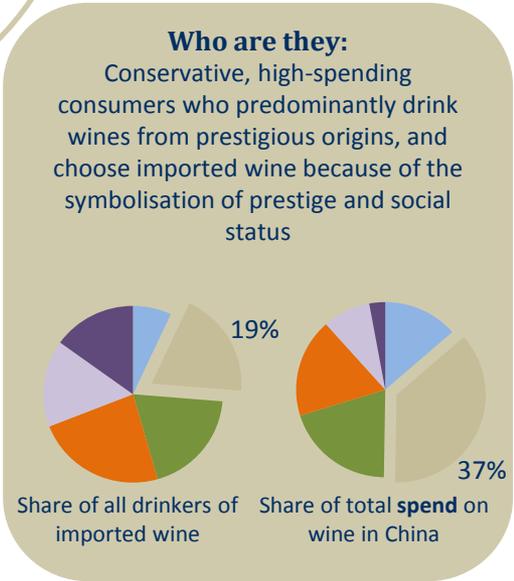


It makes me feel young  
*Prestige-seeking Traditionalist*

It is adventurous. Chasing new and exciting things  
*Prestige-seeking Traditionalist*

It is sophisticated  
*Prestige-seeking Traditionalist*

It feels premium. The bottom is larger. I prefer this because it is different.  
*Prestige-seeking Traditionalist*



# Developing Drinkers & label preference



## What do they want from labels

- Authenticity, aided by quality cues i.e. eye-catching brand logo/icon, use of black, gold and cream, clear information**



It looks classy. The gold colour looks premium. The black bottle looks stately. The white label looks clean and sleek. The gold icon on top is very cool.

*Developing Drinker*



### Top label categories



Eclectic

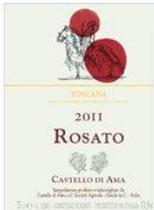


Prestigious



Modern Contemporary

- Images link to the taste/characteristics/story of the wine**



I remember seeing this in Enoteca. It has two special red dots on the label, which look like cherries. I think the wine should have note of cherries. There is also a knight on the label. It is like telling a story of a knight going on a journey to look for an authentic wine.

*Developing Drinker*

Black, cream and gold colour combination are cool. Common labels have castle in the background. This label separate the castle image and the text so that I can see the region, the brand name and its award clearly.

*Developing Drinker*



It feels like champagne.  
*Developing Drinker*

It must be a new brand.  
*Developing Drinker*

It reminds me of fashionable young men.  
*Developing Drinker*



Source: Wine Intelligence, Vinitrac® China, April '15 (n=1,001), aged 18-54 urban upper middle class drinkers of imported wine  
Wine Intelligence qualitative research – 2 focus group in Shanghai & 1-week online discussion forum with n=36 Chinese upper middle class drinkers of imported wine in Beijing and Shanghai

# Social Newbies & label preference



## What do they want from labels

### 1. Authenticity, aided by traditional and prestigious quality cues



It has chateau on the label, so it is legally protected. In Bordeaux, only wines that are made in an actual chateau can put the “chateau” image on the label.  
*Social Newbie*

### 2. Approachable

It uses bright color as the base, which is eye-catching. Compared to the normal labels that use complex font and lots of text to show the origin, vintage etc., I prefer the more straight-forward design.  
*Social Newbie*



### 3. Distinctive designs that are easy to remember

Normal wine labels have white backgrounds. This one is in black with red images of a kangaroo. It is different but elegant. It has its specialty. It is a gift from a friend from Australia. I will drink it with friends, to share the wine and talk about fun things he experienced during his trip in Australia.  
*Social Newbie*



I remember seeing Hello Kitty on a wine label. I didn't know that wine labels can be so creative.  
*Social Newbie*

## Top label categories



Eclectic



Modern Contemporary



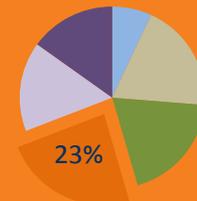
Modern Vibrant



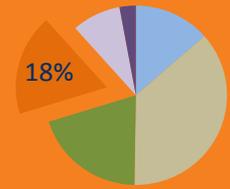
Prestigious

### Who are they:

Younger consumers who are new to the wine category. See wine as a social drink that makes them unique to their parents' generation and represents the Western and cosmopolitan lifestyle



Share of all drinkers of imported wine



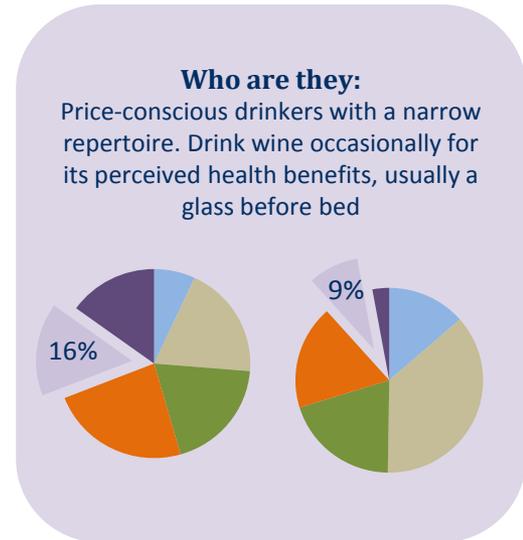
Share of total spend on wine in China

# Health Sippers & label preference



## What do they want from labels

1. **Authenticity, aided by traditional and prestige quality cues**
2. **Approachable, aided by fun designs or Chinese information that they are familiar with**



# Frugal Occasionals & label preference



## What do they want from labels

1. Approachable
2. Unique attractive designs, as an occasional special treat



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# Quantitative Methodology: Vinitrac<sup>®</sup> China 2014

- The data for this study was collected in March 2015
- Data was gathered via Wine Intelligence’s Vinitrac<sup>®</sup> online survey with 1,001 Chinese urban upper-middle class imported wine drinkers from Beijing, Guangzhou, Shanghai, Wuhan, Chengdu, Shenyang, Hangzhou, Shenzhen and Chongqing
- Methodology: Online survey
- Sampling strategy: Quotas (age, gender, city and income), 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 urban upper-middle class imported wine drinkers in terms of age, gender, city and income. See table to the right for sample distribution

Mainland China		
	Sample size	1,001
Gender	Male	51%
	Female	49%
	Total	100%
Age	18-29	41%
	30-39	28%
	40-54	32%
	Total	100%
City	Beijing	18%
	Guangzhou	13%
	Shanghai	18%
	Wuhan	9%
	Chengdu	7%
	Shenyang	8%
	Hangzhou	7%
	Shenzhen	9%
	Chongqing	12%
	Total	100%
Personal monthly income before tax	RMB 4,500-5,999	8%
	RMB 6,000-6,999	16%
	RMB 7,000-7,999	6%
	RMB 8,000-9,999	22%
	RMB 10,000 or above	49%
Total	100%	

# Qualitative Methodology: online community & focus group



## Online community methodology

- A 5-day online community discussion with consumers of imported wine were conducted in March 2015
- The online community discussion last approximately 1 to 1.5 hours per day for 5 days, covering general wine drinking behaviour and preferences, motivations and attitudes towards wine, purchase choice cues and shopping exercise
- Respondents were also encouraged to upload pictures of the wine they have drunk or their favourite wine drinking occasions
- Respondents were recruited to meet the following criteria:
  - Residents in urban areas in China
  - Aged between 18-54
  - Personal monthly income before tax > 4500 RMB
  - A mix of China Portraits segments
    - **Adventurous Connoisseurs** x 4
    - **Developing Drinkers** x 9
    - **Social Newbies** x 4
  - Not employed in wine industry or market research



## Focus group methodology

- Two focus groups with **Prestige-seeking Traditionalists** and **Developing Drinkers** were conducted in March 2015 in Shanghai, China
- Each focus group discussion last approximately 1.5 hours, covering general wine drinking behaviour and preferences, motivations and attitudes towards wine, purchase choice cues and virtual shopping exercise
- Respondents were recruited to meet the following criteria:
  - Residents in Shanghai
  - Aged between 18-54
  - Personal monthly income before tax > 4500 RMB
  - A mix of wine consumption frequency
    - **Prestige-seeking Traditionalists**: 50% monthly drinkers and 50% weekly drinkers
    - **Developing Drinkers**: 50% drink wine at least 3 times per month and 50% drink less often
  - Not employed in wine industry or market research



For any questions on this report, please contact:

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