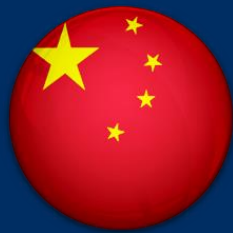


Report Brochure



THE CHINA WINE MARKET LANDSCAPE REPORT

JULY 2016



Report price

Report price:

GBP 2,500

USD 3,500

AUD 4,750

EUR 3,250

Report credits:

5

Price also includes supporting data in Excel

(All Vinitrac® questions with cross-tabulations by gender, age, city tiers, cities, Portrait segmentations and income)

95 page PowerPoint report



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“China’s recent economic slowdown and market volatility have been making the headlines along with their impact on individual investors and consumers. Despite the general economic “malaise”, China’s imported wine market made significant headway in 2015, with consumption volume reaching 43.7 million 9-litre cases, a 37% increase vs 2014 (source: the IWSR).”

“The latest research by Wine Intelligence confirms the growth of the imported wine market despite a slowing economy. In our latest comprehensive market calibration study, we found there to be around 48 million urban upper middle class imported wine drinkers in China, up from 38 million in 2014. The continued rise in disposable income, massive growth in e-commerce, and bilateral trade deals (reducing import tariffs and helping imported wine sell at reasonable prices) have made imported wine affordable and accessible to more households across the country.”

The younger generation, growing quickly in both number and income, is expected to maintain this upward trend. Those aged 18 to 29, growing up during a time of expanding wealth and without experience of contraction and hardship, are notably less price-conscious than older generations.

“Overall we are seeing the normalisation of the market and the modernisation of its consumers. China will remain one of the world’s most important markets for imported wine, but the nature of consumption is changing, and previous winning strategies are falling behind the times. Taking the time to implement the correct strategy will secure continued growth and profitability in the world’s fifth-largest wine market.”

- Vinitrac® data for this study were collected in March 2015 (n=1,119) and in March 2016 (n=1,040)
- Data were gathered via Wine Intelligence's Vinitrac® online survey
- The respondents in both waves meet the following requirements:
 - Urban upper-middle class: personal monthly income before tax at least 6,000 RMB in Beijing, Guangzhou, Shanghai, Hangzhou and Shenzhen; or 4,500 RMB in Wuhan, Chengdu, Shenyang and Chongqing
 - 18-54 years old
 - Residents of Beijing, Guangzhou, Shanghai, Wuhan, Chengdu, Shenyang, 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 and geography

How does Vinitrac® work?

1) Defining the right samples: how many wine drinkers are there in each market?

- Wine Intelligence, with the support of global research companies (e.g. TNS, YouGov), regularly runs calibration studies in each market among all adults in order to define demographic specifications of the wine consumers and the size of the market (i.e. penetration of wine consumption)

2) Running the online survey: Targeting the right consumers

- Invitations to participate in an online survey programmed by Wine Intelligence are then distributed to residents in each market
- Respondents are directed to a URL address, which provides access to the online survey
- Based on given criteria (e.g. age, beverage, frequency of wine consumption) respondents will either proceed or screen out of the survey
- Wine Intelligence monitors completed responses to build samples representative of the target markets' wine drinking population based on the most recent calibration study

3) Cleaning the data: Achieving a valid sample

- When a representative sample is logged, the survey is closed
- Wine Intelligence will then clean out all invalid data points (e.g. those who sped through the survey or gave inconsistent answers to selected questions) and weight the data in order to ensure representability

Store Visits

- Wine Intelligence research team visited Shanghai, Chengdu and Chongqing in May-June 2016 to review the current wine retail landscapes and on-trade wine scene in China
- Key physical retailers in these three cities were examined to highlight information on their products and services, promotions and displays, and market insight into retailers' strengths and weaknesses
- The researchers also looked at some of the emerging trends from the on-trade venues in Shanghai and the opportunities they presented

Trade Interviews

Trade Interviews were conducted with experienced industry professionals in May-June 2016:

Shanghai (n=10):

- 3 x importers/distributors
- 2 x hotel general managers
- 2 x food and beverage managers
- 1 x Chinese certified sommelier
- 1 x Shanghai based restaurateur
- 1 x China-based market researcher/consumer insights specialist

Chengdu & Chongqing (n=4):

- 1 x wine importer/distribution
- 3 x store managers

REPORT PRICE: • GBP 2,500 • USD 3,500 • AUD 4,750 • EUR 3,250 • 5 Report Credits

Format: 95 page PowerPoint (PDF) + supporting data table (Excel)

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If you have any questions, please contact your local Wine Intelligence office:

AVIGNON

Jean-Philippe Perrouty, Director, Wine Intelligence France | T +33 (0)486 408 417 | Email: jean-philippe@wineintelligence.com

CAPE TOWN

Dimitri Coutras, South Africa Country Manager | T +27 828288866 | Email: dcoutras@iafrica.com

DELAWARE

Erica Donoho, USA Country Manager | T +1 973 699 4158 | Email: erica@wineintelligence.com

FRANKFURT

Wilhelm Lerner, Associate Director/Germany Country Manager | T +49 (0)175 5806 151 | Email: wilhelm@wineintelligence.com

LONDON

Eleanor Hickey, Business Manager | T +44 020 7378 1277 | Email: eleanor@wineintelligence.com

SYDNEY

Liz Lee, Australia Country Manager | T +61 (0) 416 638 272 | Email: liz@wineintelligence.com

TRIESTE

Pierpaolo Penco, Italy Country Manager | T +39 349 424 3371 | Email: pierpaolo@wineintelligence.com