

Generation Z Perceptions of Rosé Wine in Australia: From Packaging to Product

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Abstract

Purpose: The project was designed to gather data related to Generation Z (18-25-year-old people) perceptions of rosé wine so as to determine which factors influence their preferences.

Design/methodology/approach: The research process was based on standard two-stage wine marketing questionnaires, which focus first on the visual perceptions and then on wine appreciation. Questions on packaging, labelling, provenance and colour using a Likert scale and comments for eleven rosé wines mainly from France and Australia, and questions on wine smell and taste for five Australian rosé wines were answered by three cohorts.

Findings: Generation Z visual perceptions were most positively influenced by bottle shape and negatively influenced by wine colour (or glass colour). Generation Z wine appreciation demonstrated marked preference for slightly sweeter, fruity rosé wine.

Practical implications: This study sheds more light on the complex consumption decision-making process for rosé wine. An important managerial implication is the resistance to the current trend of providing minimal textual information on the label.

Keywords: Rosé Wine, Generation Z, Packaging, Product Appreciation, Australia

1. INTRODUCTION

Over the past 20 years, rosé wine has risen exponentially in popularity and production. Considered in the past as a drink for those who do not usually consume wine, or as a ‘summer tippie’, with highly gendered connotations, rosé has certainly not been appreciated in the same way as red or white wines. Across the international wine industry – ranging from national government organizations to major retailers – rosé has not even had its own identifiable place, usually disappearing into the category of red wine production, consumption and sales. The

market has now shifted dramatically. According to Nielsen statistics, US rosé sales are rising 40% year on year, with global market share of rosé rising from 8% in 2002 to 10% in 2017.

Established wine critics have changed their position on rosé wines (Fitzmaurice, 2017). Numerous articles about rosé by respected writers have appeared in the United States (New York Times – Eric Asimov; Wine Spectator), the United Kingdom (World of Fine Wine; Decanter), and Australia (Gourmet Traveller Wine – Max Allen; The Australian – James Halliday; Sydney Morning Herald – Huon Hooke). Their opinions have validated rosé as a wine with more complexity and value – both cultural and economic – than previously recognized by many wine consumers (See also Dutton and Howland on ideals of fine wine).

There is significant endorsement of pale, dry Provence-style rosé wine by celebrity ‘producers’ including actors Brad Pitt and Angelina Jolie (Miraval, Provence), and rocker Jon Bon Jovi and his son Jesse (Hampton Water, Languedoc) who make their wine with Gérard Bertrand, famous ex-rugby star and owner of many châteaux, including Château l’Hospitalet, renowned for its summer jazz festival. The latest celebrity entrant to the wine scene is Sex and the City star Sarah Jessica Parker who has partnered with New Zealand’s Invivo & co to make a sauvignon blanc, launched in August 2019, with a view to making a rosé from Provence next. These mainstream, all-ages icons appeal to very broad social segments, engendering a considerable uptake of this French product by the aspirational American middle class and by extension, a large sector of the global market.

However, it is the younger Millennials or Generation Y (people born between 1980-2000) who have really led the charge towards rosé. Unencumbered by historical hierarchies or significant wine experience or knowledge, Millennials reinvented rosé as their chosen drink. Firstly, whereas pink is usually associated with femininity and/or homosexuality for older generations, Millennials have adopted it as their colour, representing an ironic post-prettiness, a kind of detached, de-problematised look for whoever wishes to embrace it (Steele, 2018). Secondly, rosé is perceived as uncomplicated, not requiring wine appreciation skills, and offers instant pleasure, unlike many other aspects of Millennial life – such as finding a permanent job, independent accommodation, etc. Thirdly, social media loves rosé. It looks good in any photograph, the packaging is often embellished and unusual, and it has spawned hashtag phenomena like ‘brosé’, ‘frosé’, and the ubiquitous ‘Yes Way Rosé’ (Stolle, 2019; Velikova et al., 2016). The two Millennials behind the @YesWayRosé Instagram account, Erica Blumenthal and Nikki Haganir, have made their own version of the wine – Summer Water, as has social media influencer Joshua Ostrovsky (‘The Fat Jew’) who found the pretty pink wine so instagrammable, he launched his White Girl Rosé in 2015 (Jonze, 2017).

For serious wine drinkers, rosé has become acceptable and sometimes even interesting; for mainstream consumers, rosé is a glamorous taste of France with a celebrity twist; for Millennials, rosé is whatever you want it to be, and so it can be constantly reinterpreted, renewed, and taken in very different and innovative directions. National Rosé Day, which occurs on the second Saturday in June, was registered with the online National Day Calendar in 2014 by Provence-based exporter Bodvar – House of Rosés. There are now rosé beers and

cidars, as well as cocktails containing rosé, pushing mixing to its limits (Willcox, 2019). In June 2019, Millennials Morgan First and Tyler Balliet opened Rosé Mansion in New York, which offers wine education experiences for the Instagram generation (Kaplan, 2019). A competition launched by New York based wine and spirits import company Biagio Cru to find an influencer to promote their own French rosé wine label Rosé All Day, was won in September 2019 by Jessica Wagner (@TheWeekenderFashion). Rosé is everywhere – in cans and magnums, in distinctively shaped bottles, noticeably present now in virtual and real life.

This study recognizes the impact of Millennials, along with other mainstream and connoisseur categories, in increasing the visibility and availability of rosé wine in the global consumer marketplace. It seeks to understand how this new scenario might play out for an emerging category of wine consumers – Generation Z who are aged between 18-25 years. In the pilot study, we asked Generation Z students based in Melbourne, Australia, from a range of experiences and cultural backgrounds, what they think of rosé packaging and then recorded their appreciation of the product. We aimed to gather data related to Generation Z perceptions of rosé wine so as to determine which factors influence their preferences.

2. LITERATURE REVIEW AND PROBLEM STUDIED

There is a relatively small amount of scholarly research on rosé wine published to date, which is to be expected due to the very recent and dramatic rise in global production and consumption. Elizabeth Gabay MW's comprehensive book on the history of rosé around the world provides a general overview of the current marketplace in the final chapter on the business of rosé (2018). More critically focused analysis of the sociological aspects of rosé wine consumption, especially in the US, has been undertaken by Fitzmaurice (2017) who found that high-status critics divested rosé wine of its low-status, feminine associations and re-invested it with high-status through referents to elite consumers and lifestyles (See also Normand-Marconnet). Two new articles on rosé wine in Italy seek to contribute to understanding why Italy's consumption of rosé wine has remained fairly stagnant in comparison to the US and France, with Rossetto and Galletto (2019) suggesting that Italian rosé producers need to strengthen associations with intrinsic attributes such as appellations as well as extrinsic ones such as brands and price; and Capitello et al. (2019) focusing on consumption context to explain consumers' choices of rosé wines in Italy. Research on the aroma and sensory profiles of Australian rosé and their likely impression in the Chinese market by Jiaming Wang et al (2016a; 2016b; 2018) offers insights into targeting Australian production for export to China. The most salient and relevant work for the present study has been published by Velikova et al (2014; 2015; 2016) whose cross-cultural comparisons of consumer attitudes towards rosé wines reveal different constructions of the perceived image of rosé in four international markets – the US, New Zealand, France, and the UK.

In contrast to the minimal scholarly research, there is a great deal of media attention and industry reporting on the rise of rosé, which points to Millennials or Generation Y as leaders of this notable trend (Stolle, 2019; Willcox, 2019; Kaplan 2019; Jonze 2017; Hoppe 2016).

This project draws on the findings of recent scholarly research, media articles and industry reporting to analyse the delving deeper into perceptions of rosé wine by exploring the links between visual perceptions and preferences/purchases and comparing them across more culturally homogenous and younger cohorts (Generation Z instead of Millennials). The data is then analysed to establish semiotic frameworks for rosé wine that are relevant to the Generation Z cohorts.

3. RESEARCH OBJECTIVES AND HYPOTHESIS

This project aimed to gather data related to Generation Z (18-25-year-old people) perceptions of rosé wine so as to determine which factors influence their preferences.

Factors include:

- a) packaging – bottle shape, size, colour, closure
- b) labelling – front and or back of bottle, name, label shape, size, colour, language,
- c) provenance – national, regional, hybrid, unidentifiable
- d) product – wine colour, smell, taste, mouthfeel

The objectives were:

- a) to establish a pilot project which will be used to develop a protocol for larger scale quantitative and qualitative online questionnaires
- b) to understand which factors influence their preferences and the degree of influence
- c) to ascertain whether certain factors influence perceived cultural and/or economic value
- d) to compare perceptions across different cohorts with more or less wine-drinking experience and knowledge to see whether responses converge or diverge

The key questions were:

- a) Which factors – packaging, labelling, provenance, product – influence Generation Z perceptions of rosé wine?
- b) How do these perceptions impact on their preferences (and potential purchases)?

The central hypothesis was that the French and/or Provence-style packaging, labelling and provenance would be the most influential factor in rosé wine preferences and purchases.

4. RESEARCH PROCESS AND METHODOLOGY

The research process was based on standard two-stage wine marketing questionnaires, which focus first on the visual perceptions and then on wine appreciation.

4.1 Selection of Participants

Participants were volunteers recruited via email and facebook messages to student groups at the Melbourne and Monash Universities in Victoria, Australia. Three different cohorts of Generation Z students, studying in three different locations were targeted to provide a balanced range of responses:

- a) Self-selected students of wine subjects
- b) Self-selected students of non-wine related subjects
- c) Self-selected international students of non-wine related subjects

Each cohort represented a different level of engagement with wine in the Australian context. Each cohort received the same written questionnaire with a number of open-ended questions. Each cohort was shown and served the same wines in the same order. Responses to the questionnaire are anonymous.

4.2 Selection of Wines

Wines for assessing visual perceptions were mainly selected from a range of rosé wines widely available in Dan Murphy's stores in Australia (one of the largest liquor supermarket chains with 30% dollar market share, owned by Woolworths Ltd), made by either French or Australian producers, including a few Australian producers who use French language on their labels. This choice enabled us to explore whether 'French-style' Australian packaging has more impact than simple Australian-style packaging. These wines included:

- a) La Boheme, De Bortoli, Yarra Valley, Pinot Noir, 2018
- b) Bird in Hand, Adelaide Hills, Pinot Noir, 2018
- c) Fontaine Rosé, Dominique Portet, Yarra Valley, Cabernet Merlot blend, 2018
- d) Le Petit Rosé, Jacob's Creek, Pinot Noir, Grenache, Mataro blend, 2018
- e) Mirabeau en Provence, Côtes de Provence, Syrah Grenache blend, 2018
- f) Côte des Roses, Gérard Bertrand, Languedoc, Grenache, Cinsault, Syrah blend, 2018
- g) Farr Rising Saignée, Farr Family, Geelong, Pinot Noir, 2018

A few lesser-known examples of rosé were also included for various reasons:

- a) Poppy the Frenchie 2018 – small production McLaren Vale 100% Grenache rosé made by Millennial winemaker Paige Cooper to appeal to Millennials, incorporating storytelling on back label about her French bulldog 'Poppy' and association with France.
- b) The Islander 2018 – ultra pale Kangaroo Island Sangiovese rosé made by French winemaker Jacques Lurton
- c) Badaginnie Run 2018 – Provence-style 100% Grenache rosé made by Strathbogie winemakers Snow Barlow and Winsome McCaughey with international consultant Ken Chase with the specific intention to appeal to Provence-style rosé consumers.
- d) Mateus NV – Portuguese rosé, lightly sparkling, in distinctive packaging which was the first imported rosé to succeed in the Australian marketplace in the 1960s and 1970s.

Wines for assessing blind appreciation were all Australian examples of similar pale colour, made of different blends from various regions:

- a) La Boheme, De Bortoli, Yarra Valley, Pinot Noir, 2018
- b) Bird in Hand, Adelaide Hills, Pinot Noir, 2018
- c) Fontaine Rosé, Dominique Portet, Yarra Valley, Cabernet Merlot blend, 2018
- d) Le Petit Rosé, Jacob's Creek, Pinot Noir, Grenache, Mataro blend, 2018
- e) Badaginnie Run, Strathbogie Ranges, Grenache, 2018

4.3 Methodology

The methodology proceeded as follows:

- a) Participants were asked to respond to some general questions regarding their own background, wine-drinking experience and knowledge.
- b) Participants examined a selection of 11 bottled rosé wines and were asked to respond to a series of questions, including a ranking of their preferences, based on their visual perceptions. There was a table for each bottle with various characteristics ranging from bottle shape to colour of wine, each with a Likert scale 1 (positive perception) - 5 (negative perception) and space for comments. They were then asked whether they would buy any of them based on their visual perceptions and which ones they considered most/least expensive.
- c) Participants were asked to taste blind 5 of the wines selected from among the 11 wines and rank their preferences. They were then asked whether they would buy any of them based on their appreciation of the product and which ones they considered the most/least expensive.

5. RESULTS AND FINDINGS

5.1 Sample Description

As this was a pilot project, we were keen to observe any tendencies related to categories established via the general questions – gender identification, cultural background, wine experience. All participants were in the Generation Z age group bar one, who was 26. There were several international students in each of the cohorts and a few Australian students in the international cohort. The ‘international’ cohort therefore cannot really be considered a discrete group for analysis, rather this category can be compared across cohorts. Wine experience indicates that participants drink wine once a week or more. Details of cohorts in the table below:

Table 1: Cohort Numbers and General Description

Cohort	Total No	No of F	No of M	No of Int	Wine Exp
a	12	7	5	3	12
b	9	6	3	6	7
c	16	9	7	13	6
Total	37	22	15	22	25

5.2 Factors Influencing Generation Z Perceptions of Wine

Given the low number of participants and the high level of qualitative responses (comments accompanying participants’ Likert responses), we focused on overall score ranges for visual perceptions of the packaging, labelling, provenance and colour, as well as standout comments. For the wine appreciation, we noted the most and least liked wines based on smell and taste.

Bottle shape was clearly a major influence on the participants’ visual perceptions of the wine. The most obviously different shapes – Mateus and Côte des Roses – were the most popular wines to buy and were considered the most expensive. Participants with more wine experience compared the Mateus bottle shape to Chivas (whisky) or cognac, adding to the perceived

prestige of this low-priced wine. Côte des Roses was admired for its elegance and prettiness and deemed a perfect gift, even though the labelling was too small and hard to read. The only other bottle shape that attracted commentary was Bird in Hand, which was favoured by a few participants for its taller than average bottle and minimalist design-focused labelling. La Boheme labelling was admired for its artistic image and Dominique Portet for the simplicity and matching copper colours of the closure, the logo on the label, and the orangey hue of the wine. However, none of these wines were as popular as the Mateus and Côte des Roses.

Wine colour was an important factor in negating perceptions. Mateus did not suffer from its dark pink colour despite association of darker pink wine with sweeter, stronger flavours, and paler, pretty pink wine with drier flavours. This may be due to the age of the participants and their declared preference for sweeter wines, especially those without much wine experience. In contrast, The Islander received much lower scores often with commentary that it was too pale, a confusing colour – ‘is it white wine or rosé?’ The labelling was also deemed too hard to read. This feedback flies in the face of recent marketing research on rosé by the CIVP and fashion in Provence production to minimise the labelling so as to show off the palest product possible in clear glass. At the other extreme, the most negative responses were to Farr Rising Saignée, bottled in amber glass with a cork, perceived as difficult: ‘can’t tell the colour’, ‘hard to open’, yet it was often also listed as one of the most expensive wines.

Provenance was not openly stated as an important influence, even though the two top wines were both from Europe – Portugal and France. The only wine from Provence, Mirabeau, was neither popular nor unpopular. It did not stand out amongst the other bottles, the name was difficult to pronounce, standard pretty pink colour. Australian wines with French names were acceptable, not often remarked upon; Le Petit Rosé was particularly appreciated as clever.

Somewhat predictably, the most polarising wine was Poppy the Frenchie, with its image of a French bulldog on the front label and the story of the winemaker’s pet on the back label. Comments ranged from ‘irrelevant’ and ‘tacky’ to ‘cute’ and ‘appealing’ with a few female Asian participants stating they would buy it to drink with friends.

In terms of product appreciation, participants almost unanimously favoured Le Petit Rosé, demonstrating that Jacob’s Creek has produced a very successful palate pleaser. Although many of the Australian participants recognised this brand as less prestigious in the visual perceptions, they selected it as the most expensive wine in the blind tasting. Bird in Hand was the most polarising, preferred by some due to its fruity sweetness. La Boheme did not appeal, nor did Dominique Portet, although the latter was considered by several to be the most expensive, interestingly correlating lack of appreciation with higher prices. Many participants said they would buy Le Petit Rosé and were delighted to discover that it was one of the most affordable wines on the blind tasting.

5.3 Visual and Taste Perceptions Impact on Potential Purchases

The impact of visual perceptions on potential purchases is predominantly related to the bottle shape, though European provenance may also be an underlying factor, given the top choices of Mateus and Côte des Roses. The particularity of Provence is not important. The act of buying rosé wine in a beautiful bottle as an affordable gift for (female) friends is also a consideration. These wines also seem like the most expensive, not necessarily for social consumption with friends, more for a special occasion. Negative visual perceptions arising from rosé that is ‘confusing’ – either not visible or too pale or difficult to open or pronounce – have an evident impact on potential purchases.

Taste perceptions’ impact on preferences and potential purchases are even more coherent, with Le Petit Rosé’s crowd-pleasing blend dominating both wine appreciation and purchases. The price point (AU\$13-18) means this wine is accessible for enjoyment with friends, and therefore a regular purchase, as opposed to the special occasion ‘gift’ purchase of the beautiful bottle.

6. DISCUSSION

This study builds on the work of Velikova et al. (2014) which found that there was considerable cultural variation on consumer attitudes towards rosé wine. They found that in France rosé was seen as a perfectly acceptable summer holiday drink; in the US unsophisticated, sweeter rosé was popular with younger, female consumers, while in New Zealand, with strong domestic white wine production and in the UK for demographic reasons rosé was not so high in consumers’ consideration sets. In this study, conducted in Australia but in a multicultural environment, we investigated young consumers’ responses to visual stimuli (packaging, labelling, colour) as well as provenance and of course smell and taste. In this study we found that stated purchase intentions were based predominantly on social factors, especially for females, and also the weather; a summer drink. (Melbourne has a Mediterranean climate with cold, wet winters and warm to hot dry summers.) We found strong resistance to the Provençal fashion, perhaps inspired by CIVP marketing research, of minimising labelling so as to show off the content; these young consumers wanted more textual information from the package. This was common to both Australian and international participants. Bottle shape, a more obvious physical feature, was a strong influence, however.

7. THEORETICAL / MANAGERIAL IMPLICATIONS AND RECOMMENDATIONS

This study sheds more light on the complex consumption decision-making process for rosé wine. In Australia, as in France (Velikova et al., 2014) it is seen as a summer drink so seasonality of sales is likely to persist. Of the international respondents, female Chinese students responded strongly and positively to the picture and description of the dog on the Poppy the Frenchie label. This is consistent with the popularity of cutesy imagery with young female Chinese people and given the strong growth in the China wine market this is something for managers to bear in mind.

Although Le Petit Rosé was very popular in the blind tasting, Australian respondents familiar with the Jacob's Creek brand rated it less favourably. This suggests that Pernod Ricard will struggle to bring the Jacob's Creek brand upmarket, consistent with the findings of Pontes, Palmeira and Jevons (2016) who found that extension direction moderated the performance of vertical line extensions; it may be more efficient to use a different brand to capitalise on the product quality.

There was little mention of the more technical aspects of winemaking, with only colour and sweetness being mentioned; a wine that was too pale was criticised, and sweetness gave rise to both positive and negative comments; managers must understand that sweetness of rosé is a differentiating factor. Provenance, likewise, was not seen as a significant contributor to the choice set. Bottle shape and label design were more important to our participants.

An important managerial implication is the resistance to the current trend of providing minimal textual information on the label. For this group of emerging wine consumers, the lack of information generated negative comment. Further cross-sectional research could investigate whether this phenomenon is associated with the type of wine or with youthful inexperience of these Generation Z respondents.

Further research could investigate whether the stated importance of bottle shape in forming purchase decisions was associated with a relative lack of sophistication among rosé drinkers, the relative inexperience of our Generation Z respondents, or because with little information from the labels the semiotics of bottle shape provided substitute signalling. Another opportunity for further research is to investigate whether consumption of rosé is driven more by social considerations than for other wines, and if so whether this is significantly gendered.

8. CONCLUSIONS

One of the key conclusions of this paper is that Generation Z perceptions of rosé wine in Australia diverge slightly away from both Millennial and mainstream global tendencies. Whereas Millennials seem to focus on personal storytelling and the pink colour, and mainstream consumers on pale, dry Provence or French provenance, Generation Z prefer striking bottle shape and sweeter fruity wine flavour for potential purchases.

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