

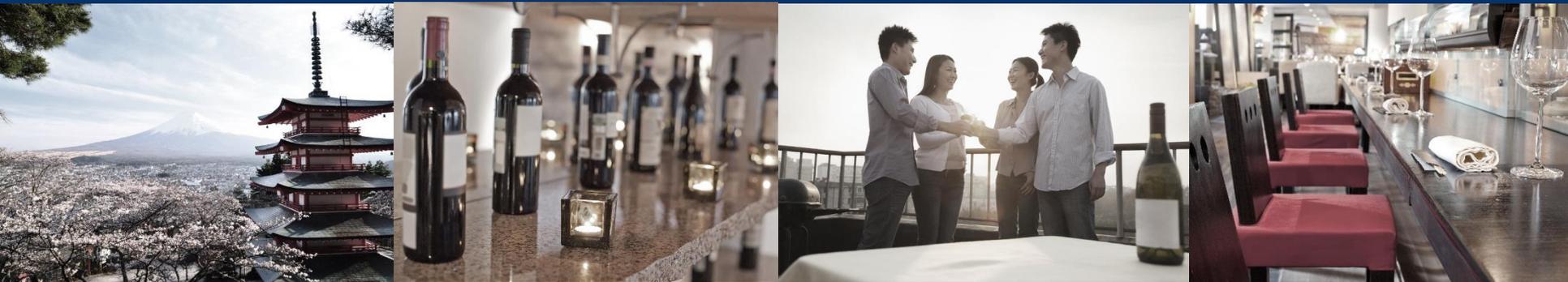
Report Brochure



THE JAPAN WINE MARKET LANDSCAPE



JUNE 2014



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Plus supporting data in Excel:

- All Vinitrac® questions with cross-tabulations by age groups, gender, region, income and involvement

Report price



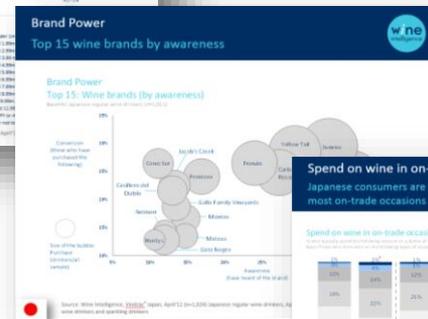
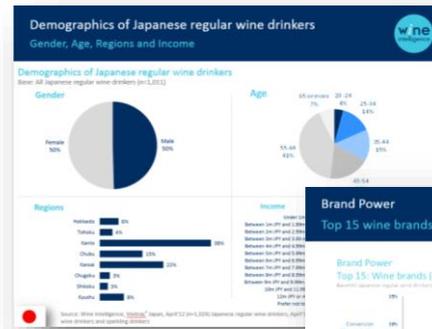
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GBP 2,500
EUR 3,000
USD 4,125
AUD 4,625

Report credits:
5

101 page
PowerPoint
report

Price also includes
supporting
data in Excel
(All Vinitrac® questions
with cross-tabulations by
age groups, gender,
region, income and
involvement)



Excerpts from the introduction



“Who drinks more wine: the Chinese or the Japanese? That’s the Chinese, whose thirst for fine French wine, eagerness for fruity New World reds and enthusiasm for vineyard planting has dominated the international wine trade agenda for the past five years ... or the quiet, unassuming Japanese with their economic woes and love of beer?”

“It’s the Japanese, and by a comfortable margin – at least in terms of per-capita consumption. In 2013, the average Japanese adult consumed just over three litres of wine, an 11% increase on the previous year and more than double what was consumed by the Chinese (whose per-capita consumption actually slipped back). Japan doesn’t attract the sort of media attention that we see for the Chinese wine market, and clearly in terms of absolute scale it’s a much smaller concern. But already almost half the adult population of Japan is drinking wine on a regular basis. Wine Intelligence classifies the country as a growth market, and our most recent tranche of consumer research gives us every reason to believe that this growth will be forthcoming”

“Let’s consider some of the top line data. Japanese consumers are drinking wine much more regularly than they were even as recently as two years ago: indeed, the proportion drinking wine most days or every day has almost doubled since 2012. There have also been marked increases in the proportion of regular wine drinkers who drink two to five times a week, and about once a month”

“Japan is already a 35 million case market, the 16th largest in the world, and there are clear indications that it can go further. How much further will depend, in part, on how much resource exporters devote to understanding Japanese consumers – and nurturing what is already a healthy interest in their product”

Graham Holter
Associate Director -
Publishing
Wine Intelligence



June 2014



Research Methodology

Vinitrac® Japan - Regular wine drinkers



- Data collection:
 - The data for this report was collected in April 2012 and April 2014
 - Data was gathered via Wine Intelligence's Vinitrac® Japan online survey and is representative of all Japanese regular wine drinkers
 - Sampling: quotas / stratified
- Screening criteria:
 - Respondents were required to drink wine at least once per month, to drink at least red, white or rosé wine and to buy wine in the off-trade and/or in the on-trade
- Data processing:
 - Invalid responses (those who completed the survey too quickly, or who "straight-lined" through selected questions) were removed from the sample
 - The survey was post-weighted in terms of age and gender



- Data collection:
 - The data for this section of the report was collected in April 2014
 - Data was gathered via Wine Intelligence’s Vinitrac® Japan online survey and is representative of all Japanese sparkling wine drinkers
 - Sampling: quotas / stratified

- Screening criteria:
 - Respondents were required to drink sparkling wine

- Data processing:
 - Invalid responses (those who completed the survey too quickly, or who “straight-lined” through selected questions) were removed from the sample
 - The survey was post-weighted in terms of age and gender



- Measures from the IWSR correspond to actual wine consumption figures. This means sales into the trade (on + off premise)
- The IWSR visits each market each year. Discussions are held with key local experts in the market including importers, producers, grey market operators, duty free operators, and supermarket/hypermarket buyers.
- All volume data is given in thousand 9 Litre Cases
- In the breakdown by country of origin, IWSR includes (depending on the market and the size of the category) the following two categories: 'Other' and 'International'
They are defined as followed:
 - 'Other': category including wine blends (normally in bulk or bottled without specified country of origin) and wines from other countries with volumes too small to break out separately
 - 'International': Category including wine brands that have wines from various countries
- The IWSR includes the following types of wine in its definition of 'wine':

Definitions

WINE =

Still light wine +

Sparkling (Champagne & other) +

Fortified

} Sub-categories

SAMPLE SIZES

At least 500 respondents per survey; 1,000 in most countries, 2,000 in US
Regular adult wine drinkers (where 'regular' = drinks wine at least once per month)

Each Vinitrac® survey starts with questions to screen respondents:

- Adult drinking age within each country
- Permanent resident of the country being surveyed
- Drinks wine at least once per month
- Drinks at least red, white or rosé wine
- Buys wine in the off-premise and/or in the on-premise channels

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



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

WHY IS VINITRAC® NOT A PANEL?

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

HOW DOES VINITRAC® WORK?

- Invitations to participate in Vinitrac® are distributed to adult consumers in each market
- Consumers interested in a wine survey are directed to an URL address, which welcomes them to the online survey
- Wine Intelligence monitors incoming completed responses to build a sample representative of the wine drinking population of the target market
- When a representative sample of at least 1,000 (US: 2,000) is logged, the survey is closed

REPORT PRICE: • GBP 2,500 or 5 Report Credits



Format: 101 page PowerPoint (PDF) + supporting data in Excel

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