



WINE INTELLIGENCE

JAPAN WINE LANDSCAPES

NOVEMBER 2021

REPORT BROCHURE

PRICING



Option 1: Report + data table

Option 2: Report only (no data table)

Price:

GBP 3,000
USD 4,200
AUD 6,000
EUR 3,600

Price:

GBP 2,500
USD 3,500
AUD 5,000
EUR 3,000

Report
length:
83
pages

Options to pay online or via invoice

First time buyer, small business and academic discounts available.

Please contact enquiries@wineintelligence.com to enquire.

CONTENTS



05 **Introduction**
Management summary

15 **Overview of Japanese wine market**
Market Classification
Imported vs. domestic still wine
Imported vs. domestic sparkling and fortified wine
Per capita consumption of still light wine

21 **Overview of Japanese wine consumers**
Demographics
Wine consumption frequency
Attitudes towards wine and involvement
Wine confidence and knowledge index

30 **COVID-19 and Japanese market**
Off-trade change in spend
Change in channel usage
Anticipated and future behaviors
Origin change in trust and purchase

40 **Repertoire**
Alcoholic beverage repertoire
Varietal consumption
Origin awareness and consumption

52 **Wine-buying behaviours**
Wine-buying channel usage
Wine-buying retailer usage
Wine-buying choice cues

59 **Wine consumption behaviours**
Off-trade: wine consumption frequency by occasion
Off-trade: spend on wine by occasion
Wine purchase in the on-trade
On-trade: wine consumption frequency by occasion
On-trade: spend on wine by occasion

65 **Brand health**
Brand power
Brand awareness, purchase, purchase conversion, consideration, affinity, and recommendation

80 **Research methodology**
Quantitative
Qualitative

INTRODUCTION



Japan has an age problem. With one of the longest life expectancies in the world, and one of the lowest birth-rates, it holds the title of the “oldest” country on the planet. According to the Statistics Bureau of Japan, nearly three in 10 are now over 65 years old, and over-65s outnumber 20-35 year olds by a factor of approximately 2:1.

Why does this matter? The overall tilt of the population is having a profound impact on the makeup of the Japanese wine market, which is already finding it hard to recruit younger legal drinking age (LDA) drinkers. Around two thirds of regular wine drinkers are now aged 55 or older, compared with just 10% who are LDA-34. The over-55s tend to be less experimental with their approach to wine, are more price conscious, and also have the lowest category involvement. The younger Japanese who have chosen to enter the wine category are much more adventurous and high-spending.

Since our previous Japan Landscapes report in 2019, the Japanese regular (monthly) wine drinking population has remained stable. This follows a precipitous decline since 2016, and in part reflects the long-term struggle wine is facing to attract new, younger LDA+ consumers to the category in the face of competition from RTDs, beer and non-alcoholic beverages.

Even with the sharp decline in the size of the regular wine drinking population, consumer involvement with the wine category – a proxy for premiumisation - has increased with both confidence and knowledge rising. This is being driven by those drinkers aged under 55.

In line with global trends, Japanese consumers have warmed to the attractions of domestically-produced wine during the pandemic with recalled purchase of other origins lower as a result of Covid. Japanese consumers are placing a greater amount of trust in their locally-produced wine compared to imported products. In the adjacent category of Sake, purchase and recalled consumption amongst regular wine drinkers has increased since 2018.

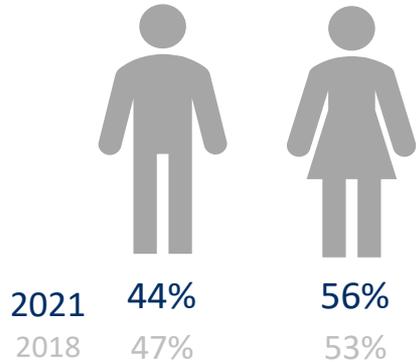
Another Covid-era effect is the rebound in consumption occasions and spend in 2021. Japanese consumers say they are drinking more often in the off-trade for informal and relaxed occasions, though spending similar amounts as before. The increase in spend per bottle has largely been focused on formal or celebratory occasions in the off-trade, as consumers look to treat themselves in social settings after repeated lockdowns and restrictions on travel.

EXAMPLE SLIDE: DEMOGRAPHICS OF JAPANESE WINE REGULAR WINE DRINKERS

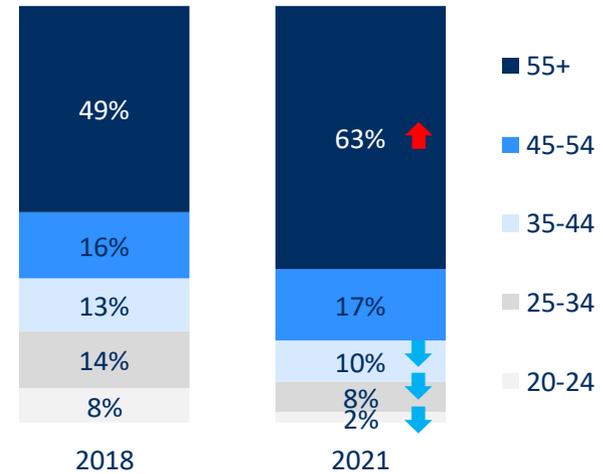


Increasing proportion of Japanese wine consumers are aged 55 and over; decline among younger adult consumers also likely to be connected with lockdown restrictions

Gender



Age



Regions

Region	2018	2021
Kanto	47%	46%
Kansai	19%	18%
Chubu	11%	12%
Kyushu	7%	8%
Hokkaido	5%	6%
Tohoku	4%	5%
Chugoku	5%	4%
Shikoku	1%	2%

Total household income (before tax)

Income Category	2018	2021
Less than 4 Million円	23%	25%
4 - 7.99 Million円	41%	37%
8 - 9.99 Million円	13%	14%
10 Million円 or above	17%	17%
Prefer not to say	7%	7%

↑ / ↓ : Statistically significantly higher / lower than the 2018 wave at a 95% confidence level
 Source: Wine Intelligence, Vinitrac® Japan, Mar'18 and Mar+Jul'21, n≥1,000 Japanese regular wine drinkers

EXAMPE SLIDE: CHANGE IN CHANNEL USAGE

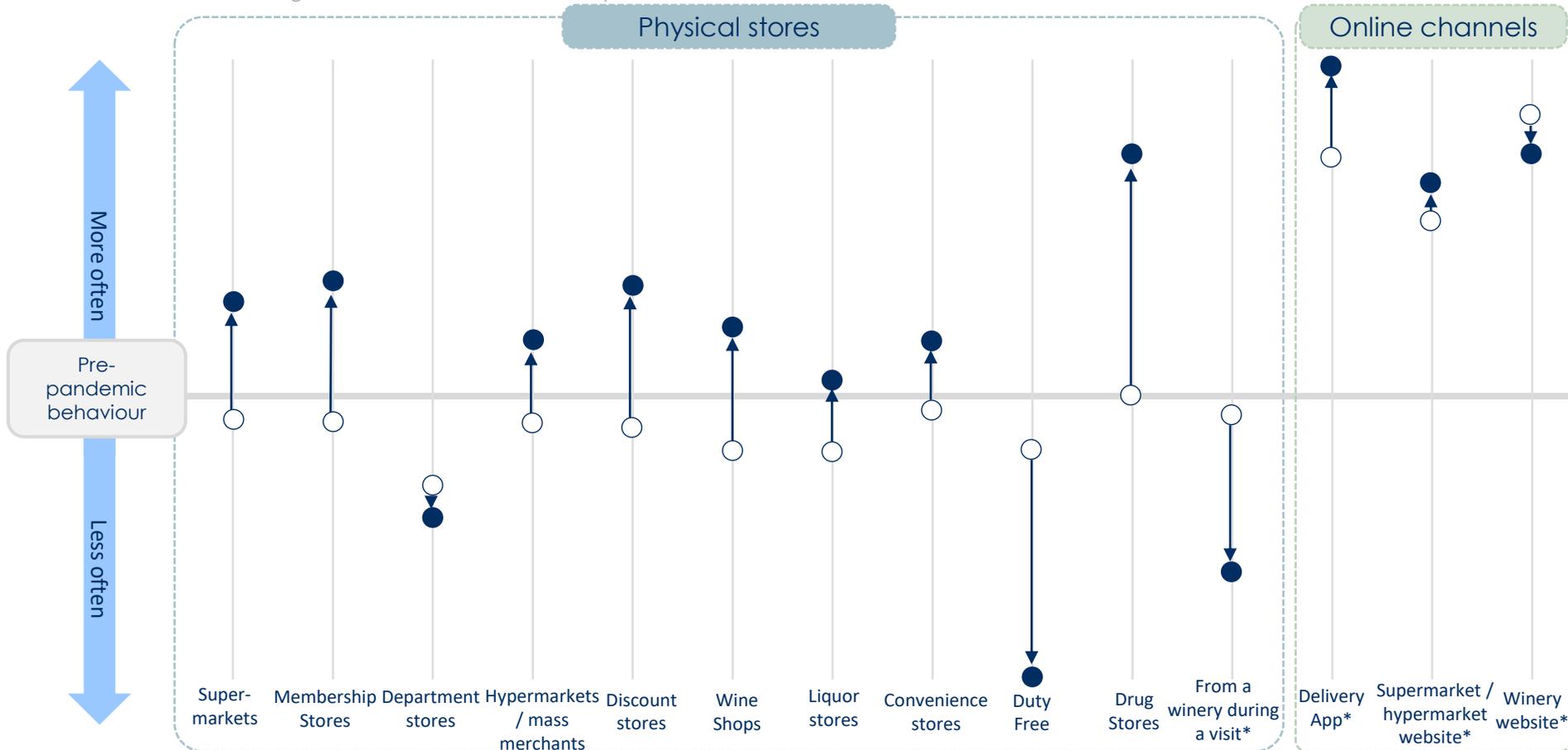


Increases in the use of most channels compared with March 2020, with the exception of department stores, Duty Free, and from wineries; online channels remain high, suggesting that e-commerce is becoming more entrenched in consumers' behaviours

Change in **channel usage**: March 2020 & July 2021 vs pre-pandemic behaviour

Indexed change in channel usage in March 2020 and March 2021
 Base = Those who have bought wine from each channel in the past 6 months

- March 2020 / March 2021*
- July 2021



*: Please note that March 2021 data was used for tracking of these channels instead of March 2020 as they were first asked in March 2021
 Source: Wine Intelligence Vinitrac® Japan, March 2020 and July 2021, n≥1,000 Japanese regular wine drinkers

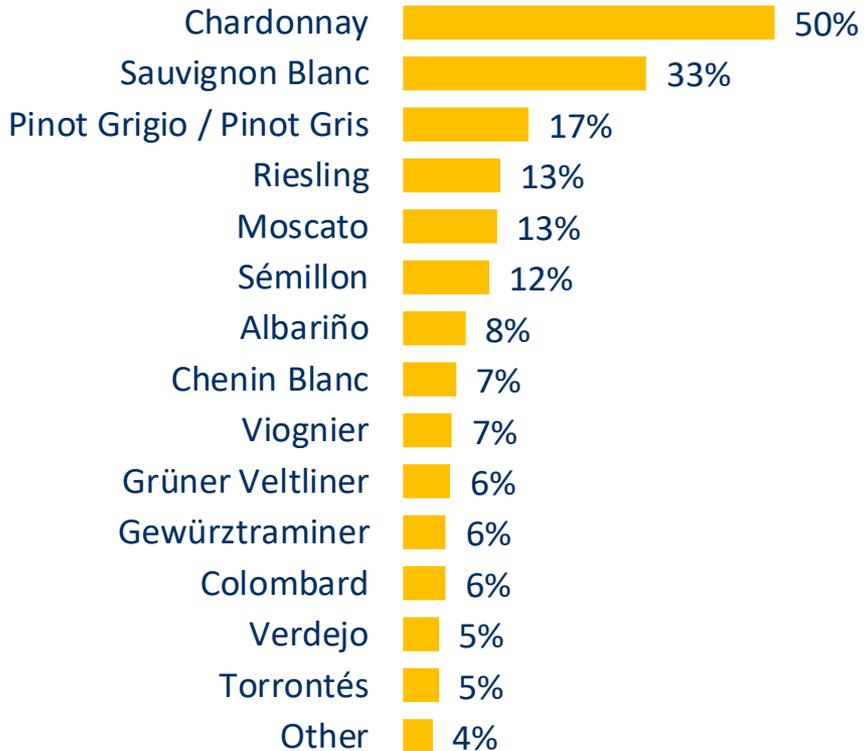
EXAMPLE SLIDE: VARIETAL CONSUMPTION



International grape varieties Chardonnay, Sauvignon Blanc, Cabernet Sauvignon, and Merlot are the most-consumed wine varieties by Japanese regular wine drinkers

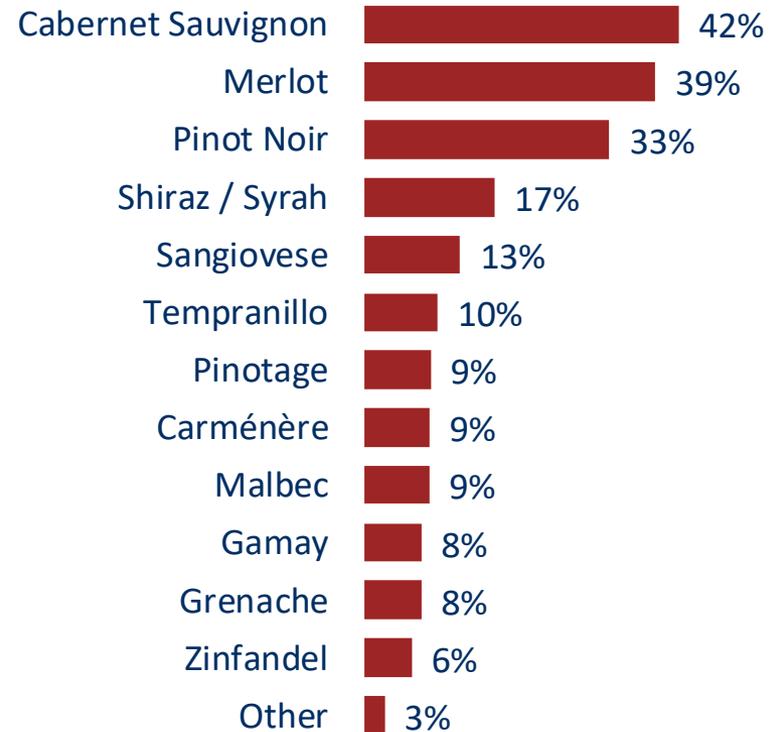
White varietal consumption

% who have drunk the following varieties or wine types in the past 6 months
Base = All Japanese regular wine drinkers (n=2,000)



Red varietal consumption

% who have drunk the following varieties or wine types in the past 6 months
Base = All Japanese regular wine drinkers (n=2,000)



Ready to purchase?

- [Buy online](#)
- Request an invoice by emailing enquiries@wineintelligence.com

Need to know more?

- Email enquiries@wineintelligence.com with your question(s)



*Connecting wine businesses with
knowledge and insights globally*

Wine Intelligence London (Head Office)

Nutmeg House
60 Gainsford Street
London
SE1 2NY

Telephone: +44 (0) 20 8194 0090
Email: enquiries@wineintelligence.com
Website: www.wineintelligence.com

Follow us:   