

# Wine Australia Cider Survey: Japan

# Executive Summary: Japan

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- **Internet browsing and visiting of ecommerce channels** appear to trump social media usage among Japanese respondents. **Line**, but also YouTube and Twitter, are all ahead of Facebook in terms of social media/messaging platforms.
- Consumer research confirms that the **concept of alcoholic cider is not particularly well-known in Japan**, despite the presence of domestic ciders. Only half of respondents professed some knowledge of the existence of the category while one third were sure the concept did not exist. Only one third of respondents knew there were Japanese-made alcoholic ciders.
- Japanese respondents appear particularly **loyal to one or a small group of drinks brands they enjoy**. While there is some adventurism in terms of trying out new brands and concepts, it appears not to be particularly well-developed.
- There is also a significant proportion of respondents – one third - who claim to favour **domestic drinks brands only**.



# Executive Summary

- **Differentiation from the norm** is at the forefront of thinking among respondents who claim to enjoy artisanal/craft drinks brands. Perceived premium quality does not appear to be a key consideration.
- Just over half of respondents **assign some importance to provenance** when choosing drinks, with only 14% claiming this is very important to them. A fifth assign little or no importance to this.
- Only 14% of respondents revealed themselves as **active cider drinkers**. Those claim to primarily consume cider through off-premise purchases, but cafés, restaurants and bars also received significant mentions.
- Among respondents who are not currently alcoholic cider drinkers, **42% professed themselves willing to try** – but an almost equal proportion also ruled any trial out.
- **'Fruity', 'crisp', 'sweet' and 'fresh'** appear to be strong cues among cider drinkers in this survey. **'Dry'** is **not** a strong cue, nor is **'sociable'** – although **'fun'** is.



# Executive Summary

- **Brand recognition among alcoholic ciders is low**, with only domestic brand **Nikka** scoring relatively highly. Note that the three leading responses – Nikka, Aomori and Kirin – are all umbrella brands covering other alcoholic beverages: Nikka whisky, Aomori wine, Kirin beer. Recognition rates and active drinking claims of imported brands are universally low.
- **'Koala'** is by far the leading cue mentioned by respondents when asked about Australia, followed by **'kangaroo'** by some distance. Other key unprompted cues – other than 'bushfires' – were **tourism-related phrases** as well as a variety of phrases surrounding **nature and natural beauty**. The only food & beverage-related term mentioned spontaneously by more than one respondent was 'Aussie **beef**'.
- In prompted word association on Australia, **food, drink and indeed fruit and apples are also relatively low** in terms of number of mentions. Beyond 'Sydney' and 'wildlife' word associations are low in general. Note that 'friendliness' and 'relaxation' score remarkably low.
- **Recognition of Australian brands** among Japanese respondents is **generally low**. **Yellowtail** is the leading drinks brand, but low at only 16% of respondents. Foster's and Penfolds recognition is insignificant. Most respondents professed not being familiar with any of the brands tested. Two thirds of respondents also claim not to drink any Australian alcoholic beverages – among those who do, wine is key.



# Executive Summary

- Japanese respondents are decidedly ambivalent about the likelihood of trying Australian ciders. **Only 6% profess themselves enthusiastic, a combined 40% are mostly positive.** One quarter of respondents say they are unlikely to try.
- **Variety and adventurism** as well as **good perception of Australian quality** is at the forefront of Japanese respondents willing to consider Australian ciders. The many, however, who would not consider trying Australian ciders mainly cite **low expectations** as their main reason.
- While more than a third of Japanese respondents have a positive reaction to the Cider Australia authenticity logo there is a **strong degree of ambivalence among almost half of respondents**, and just under a fifth of respondents deemed themselves untouched by the logo.



# Context: Japan

# Methodology

Nationally representative quotas were set for **age and gender (within each age range)**.

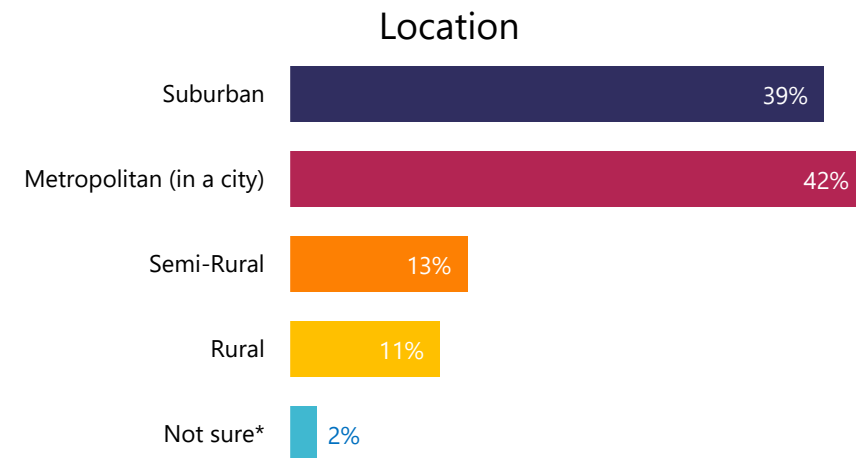
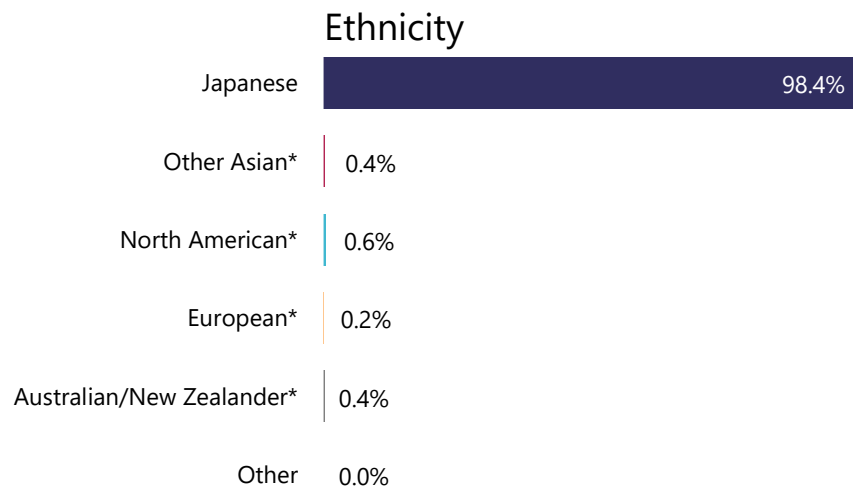
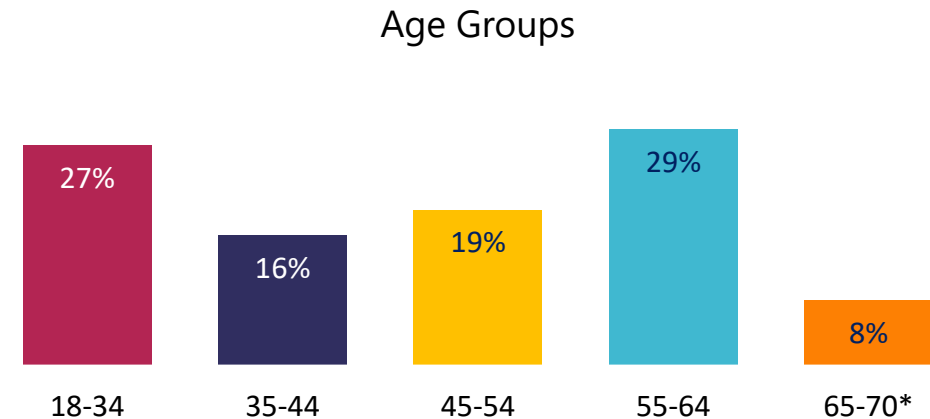
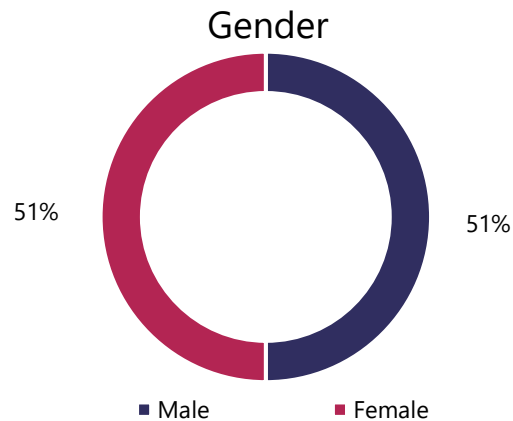
Age & Gender	Males	Females
18-34	63	72
35-44	35	46
45-54	52	45
55-64	81	65
65-70	23	19

Respondents were screened based on whether or not they drink **'soft ciders, hard ciders or other alcoholic drinks'** at least every 2-3 months. Alcoholic cider consumption is not widespread enough to warrant a dedicated cider drinker sample. Its consumption was tested with double-lock questions for added verification.





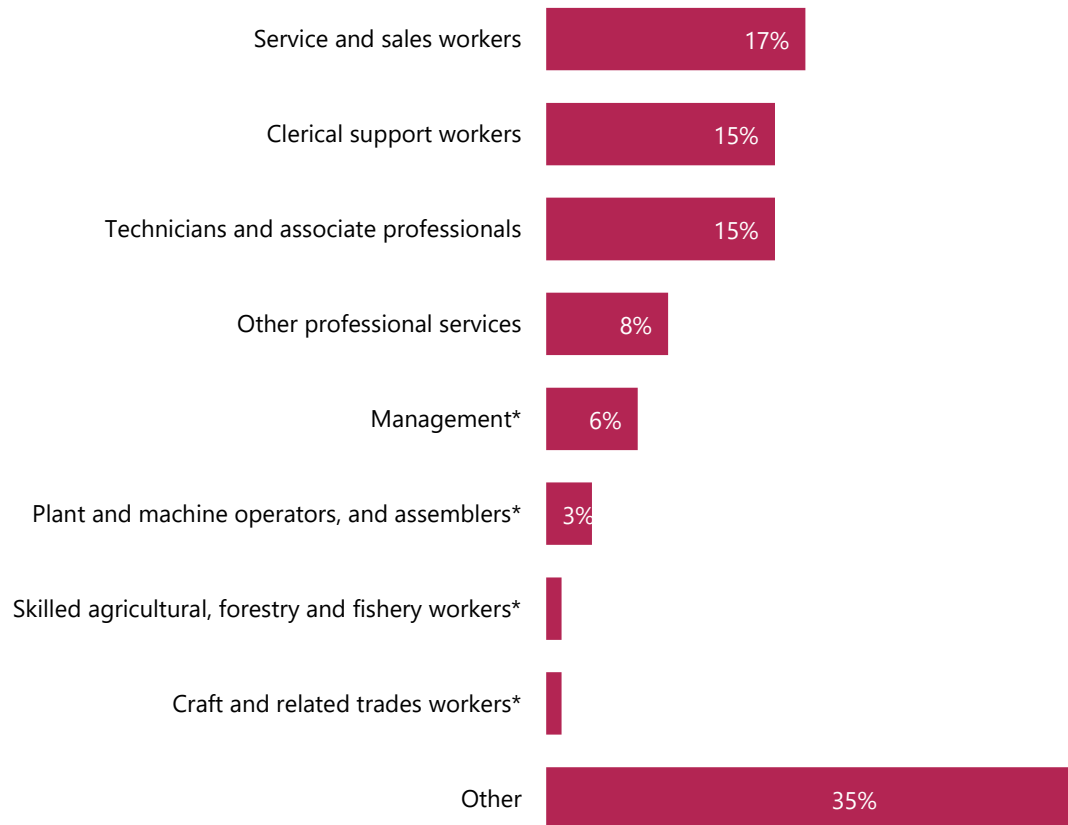
The survey was held among a group of respondents broadly representative of the national population in terms of gender and age. Very few non-Japanese responded to the survey. More than 80% of respondents live in an urban or suburban setting.



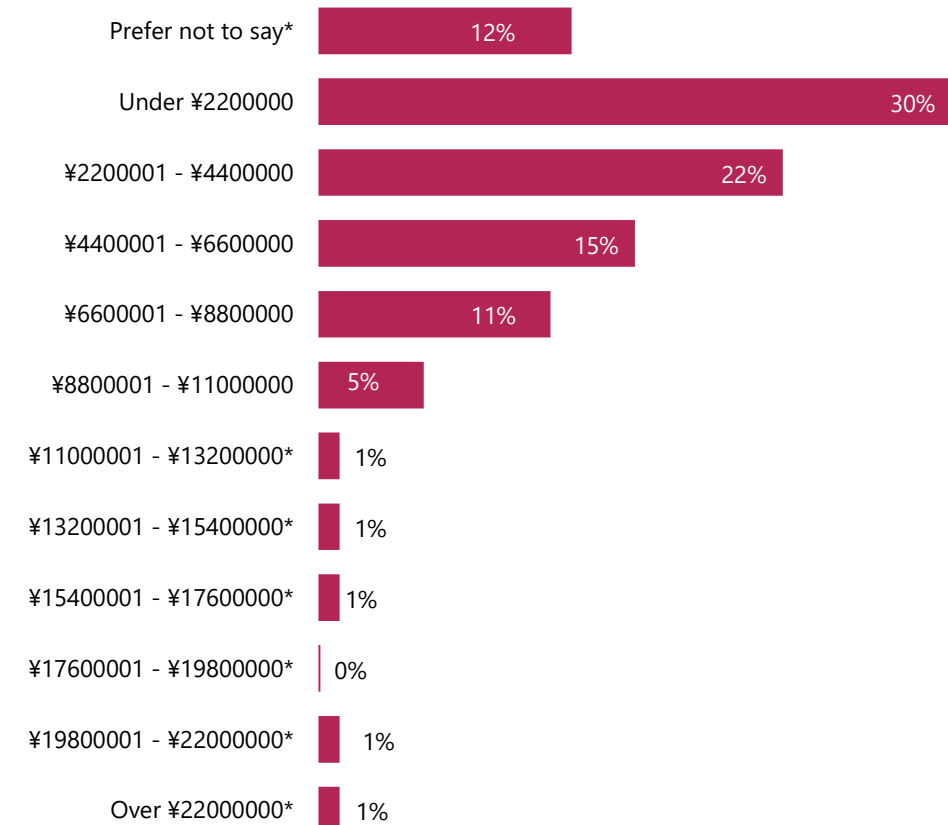
Q1-3 & Q5. "Demographics"  
 Base size: All respondents (n=501)  
 \* Low base size

## Japanese respondents of this survey are pooled mostly at middle- and lower income levels

### Occupation Of Main Household Income Earner



### Annual Income



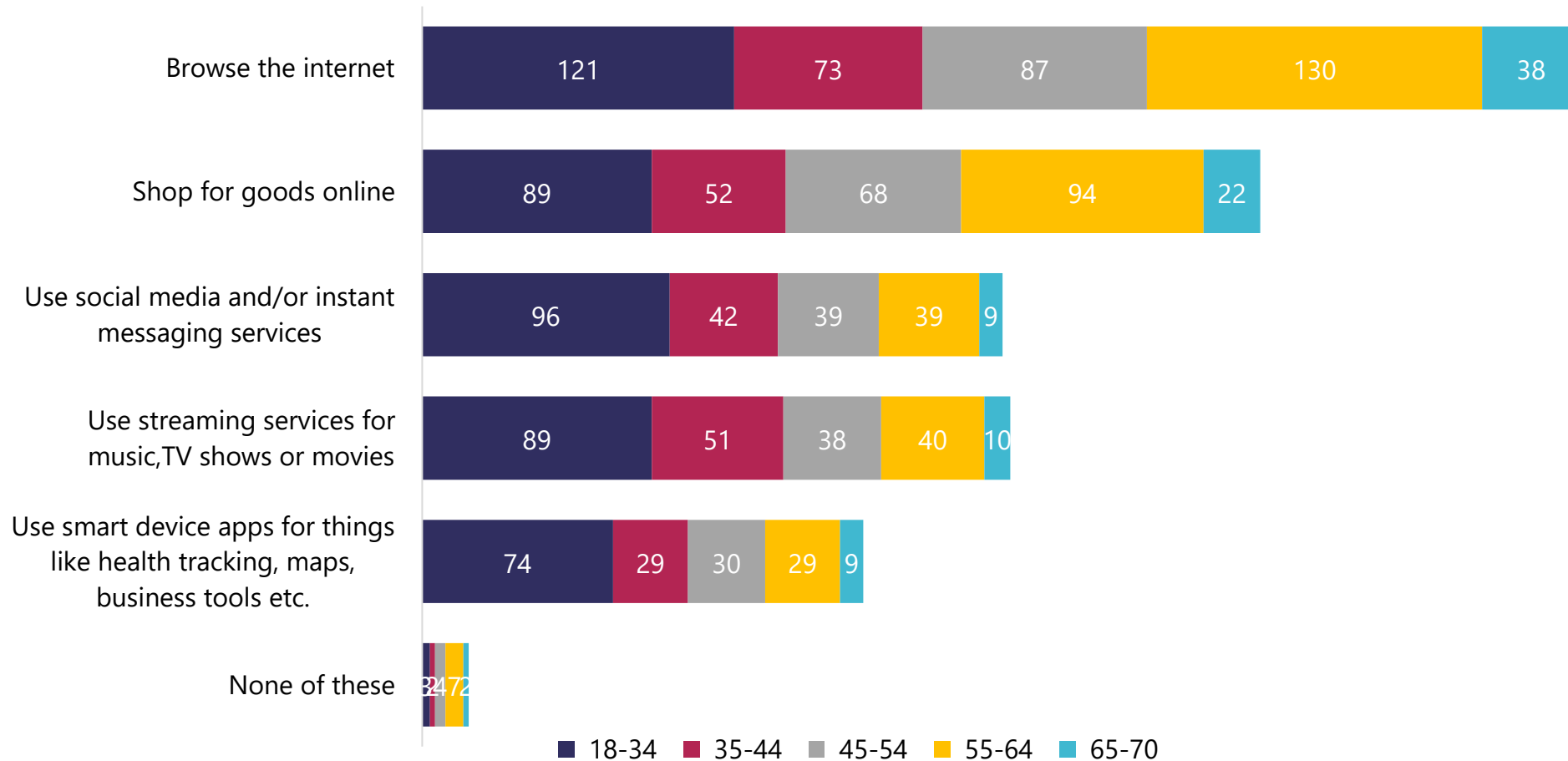
Q4 & Q6. "Employment & Earnings"

Base size: All respondents (n=501)

\* Low base size

Other than browsing (90%) and ecommerce (65%), internet usage among respondents is relatively low. Social media usage is relatively low at 45% of respondents, heavily geared towards the youngest cohort.

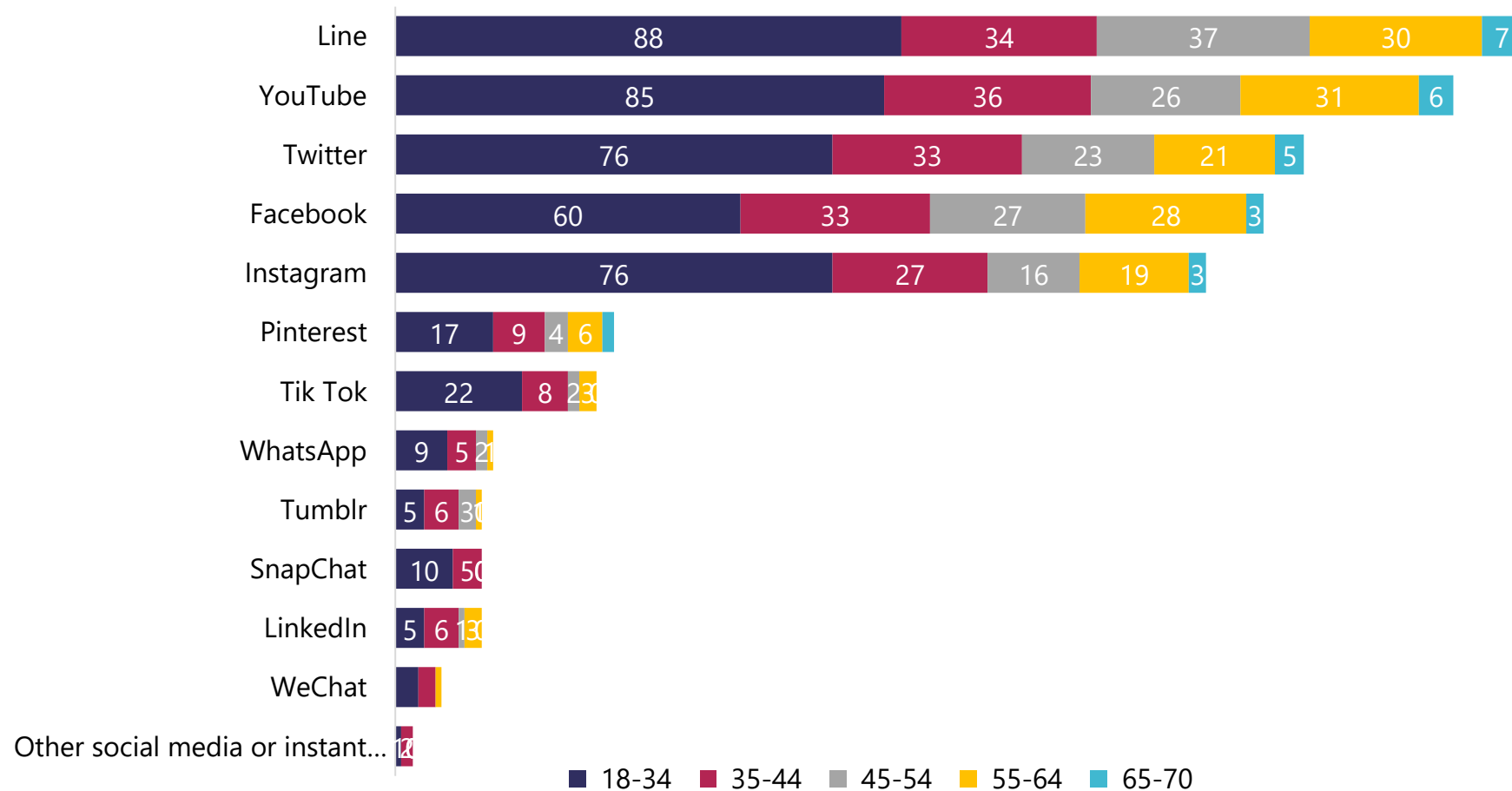
### Internet behaviour by age



Q8. "Which of these things do you do once a month or more often?" (multiple response)  
Base size: All respondents (n=501)

Usage of **Line** as a social media platform (87% of social media users in this survey) outweighs that of Facebook (67%). Five platforms appear ubiquitous in Japan while usage of other platforms appears reduced. The oldest cohort is not a significant social media user, of any platforms.

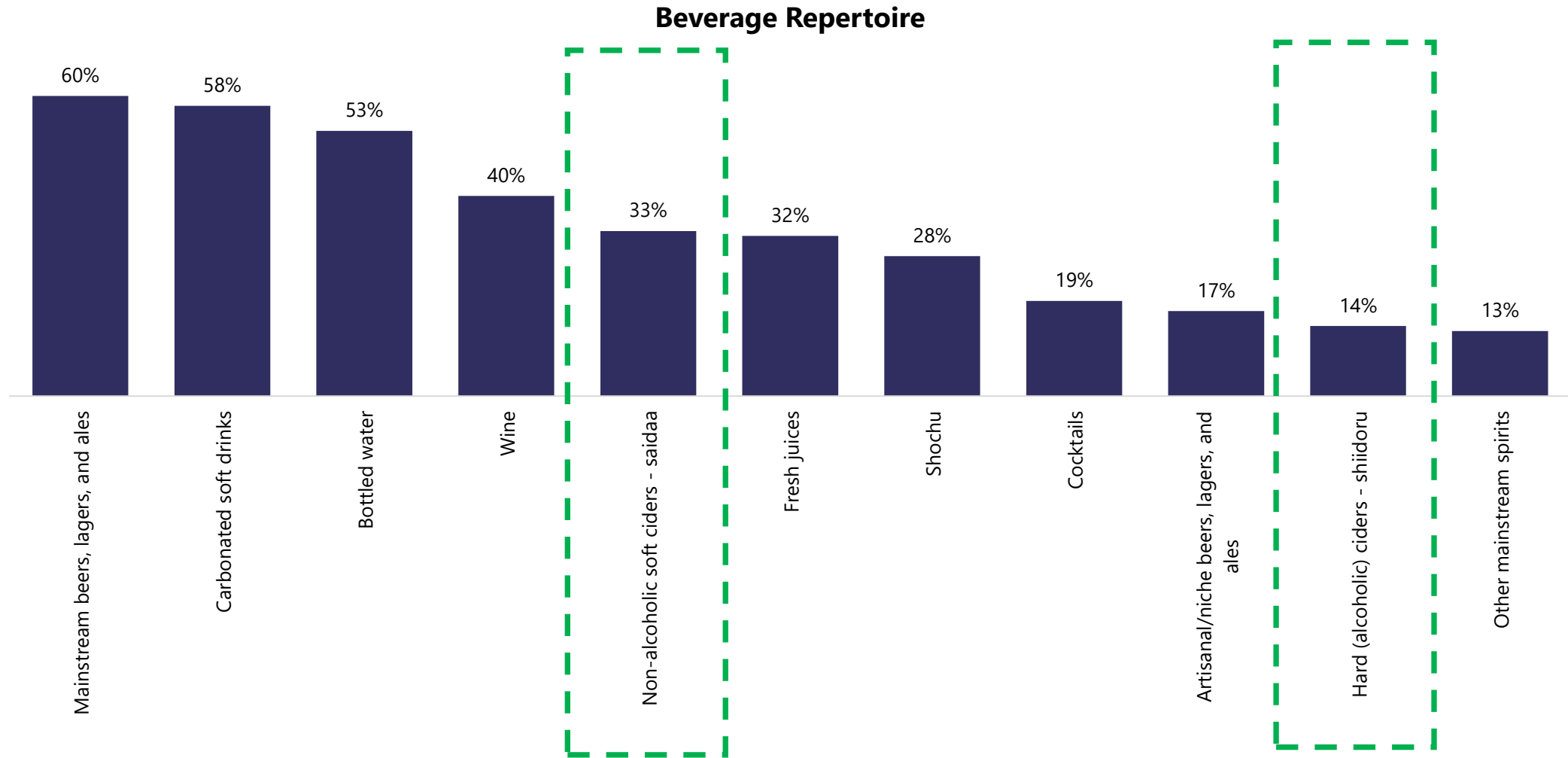
## Social Media/Messaging Platforms by Age



Q9. "Which social media and/or instant messaging services do you use?" (multiple response)  
 Base size: All respondents who use social media (Q8) (n=225)

# Drinking Behaviour: Japan

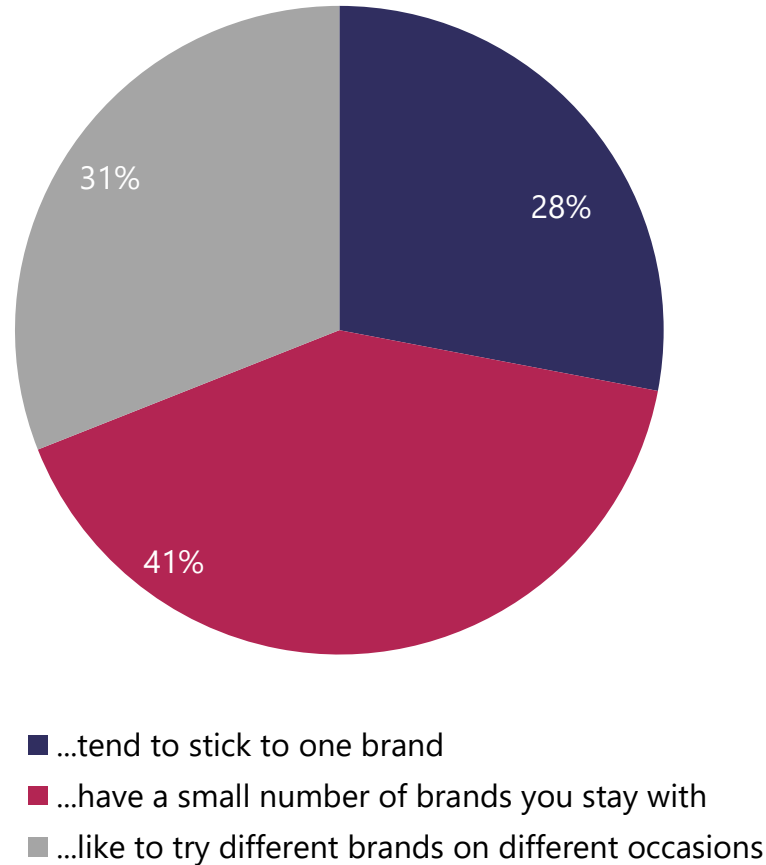
Only 14% of Japanese respondents identify themselves as (alcoholic) cider drinkers, while a third drink non-alcoholic variants. Mainstream beer followed by wine are the main alcohol categories respondents claim to drink.



Q7. "Which of these types of drinks do you drink at least every 2 to 3 months?" (Multiple response)  
 Base size: All respondents (n=501)

**Brand loyalty**, even a restrictive one that centres on one particular brand, is **deemed strong** among Japanese respondents. Almost one third of respondents tend to stick to only one brand, with another 41% restricting themselves to a small number of brands. **Only one third professes themselves fairly adventurous in their drinks choices.**

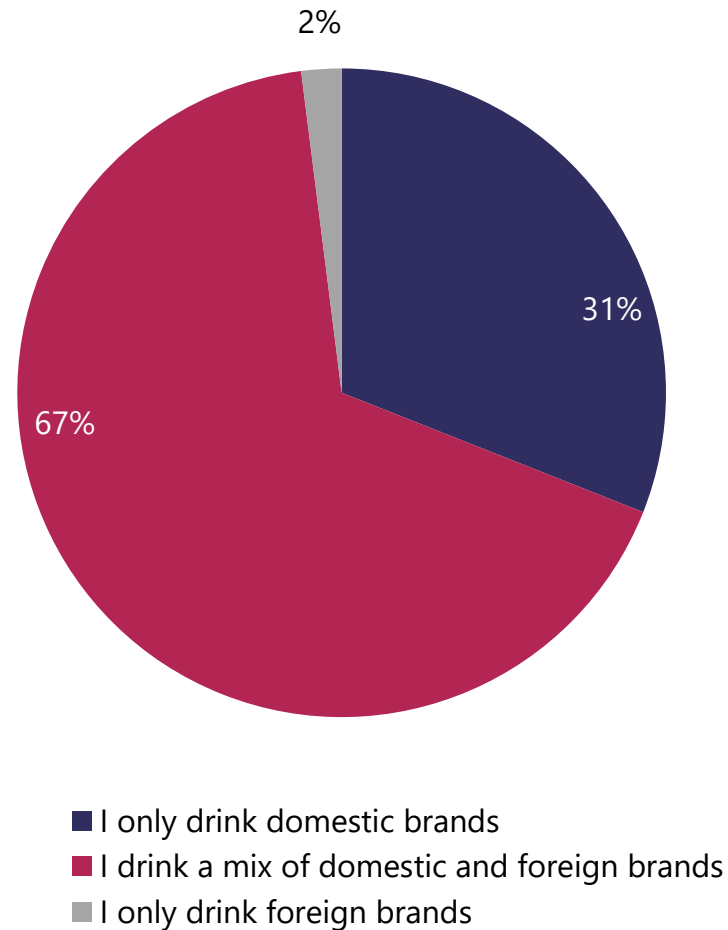
### Spread of Drinks Brands



Q13. "When choosing drinks brands, do you... (n=501)

A strong third of Japanese drinkers in this survey will **only drink domestic brands**. Two thirds are open to foreign drinks brands.

### Local or Imported Drinks?



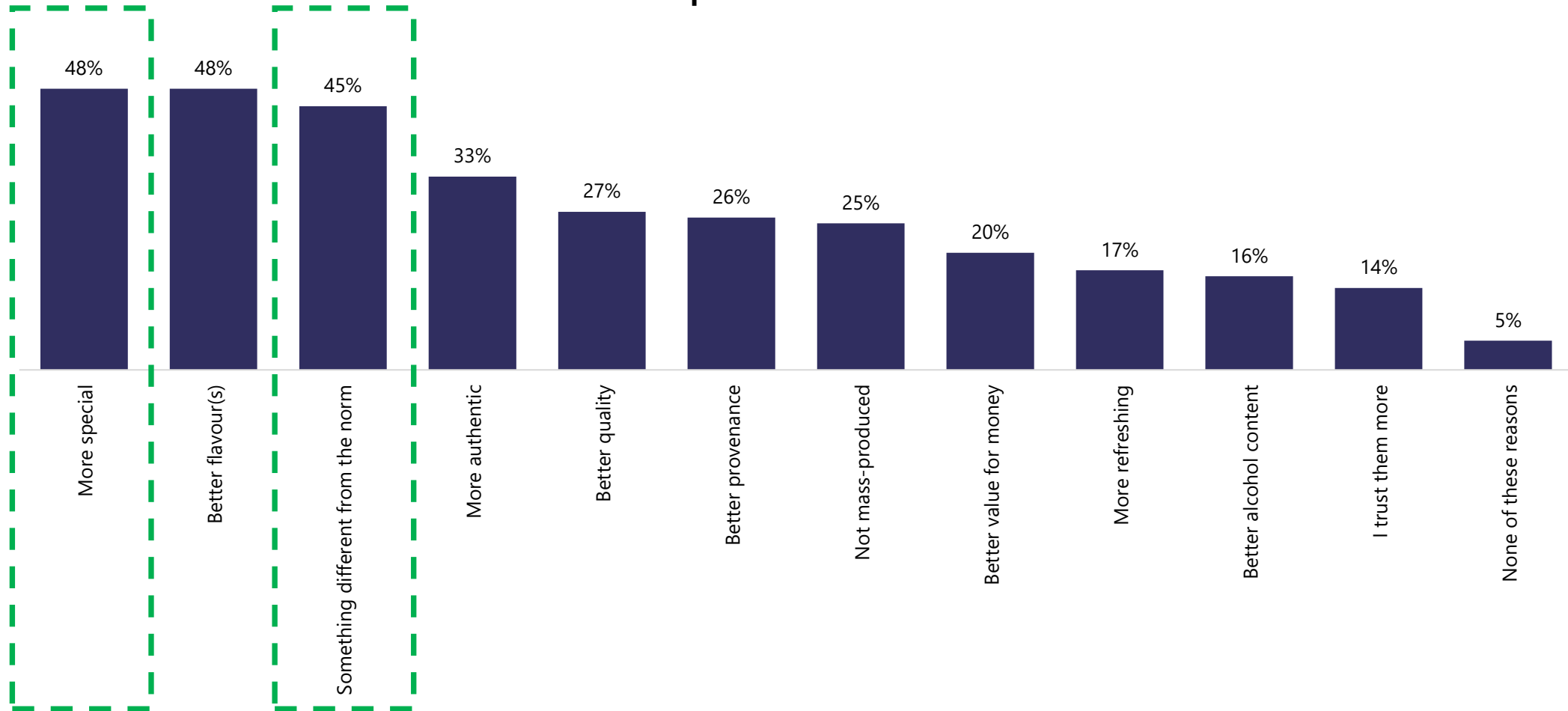
Q14. "Do you drink domestic brands (from your own country), foreign brands, or a mix?" (n=501)



# Attitudes Towards 'Craft': Japan

**Differentiation from the norm** appears to be at the forefront of Japanese drinkers in this survey who choose craft or artisanal drinks over mainstream drinks, alongside with the thought that flavour profiles are preferable.

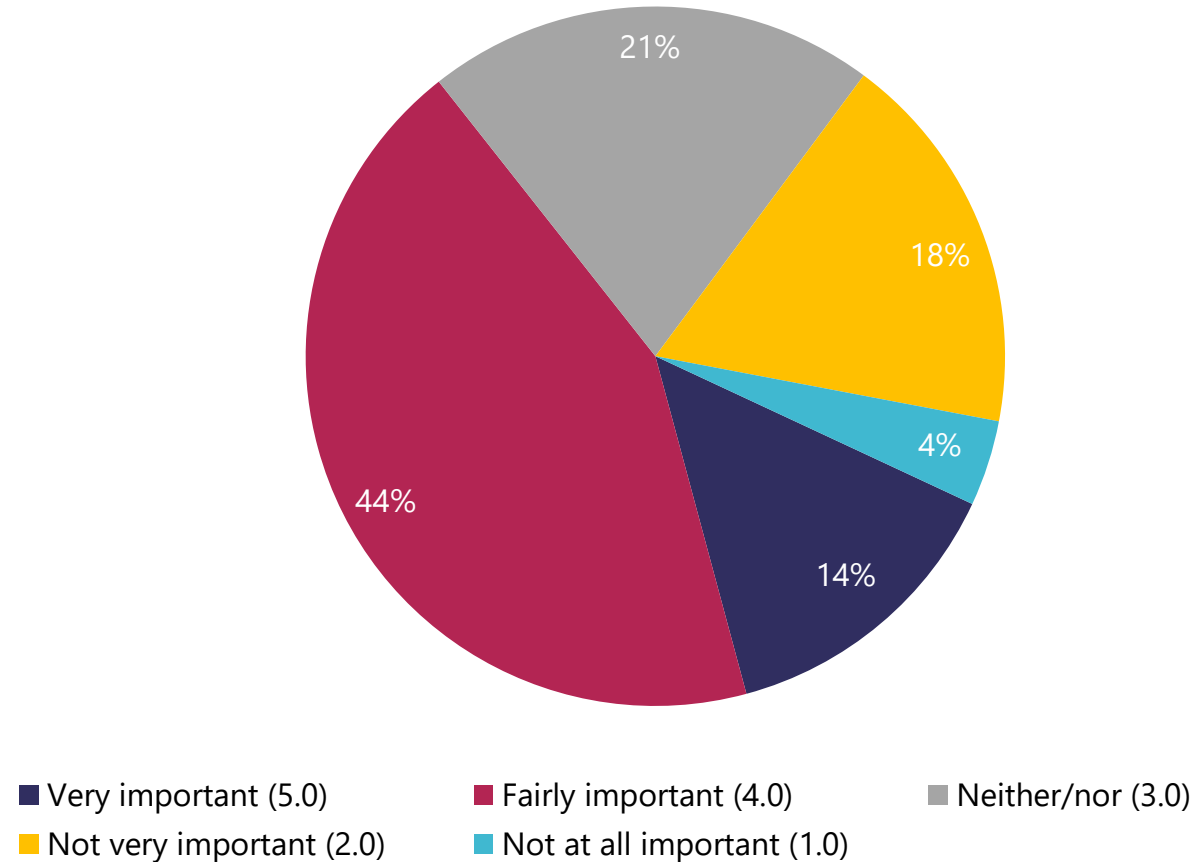
### Prompted Word Association



Q16. "And which of these reasons fit with why you choose craft drinks brands over mainstream drinks brands? Please select all reasons, even if you mentioned them in the previous question?" (n=101; craft/artisanal drinkers only) (Multiple response)

Just over half of respondents, **irrespective of whether they drink craft brands**, assign some importance to knowing where the drinks come from (although this is very important to only 14% of them). While around a fifth is ambivalent, another fifth assign little or no interest.

### Importance of Provenance

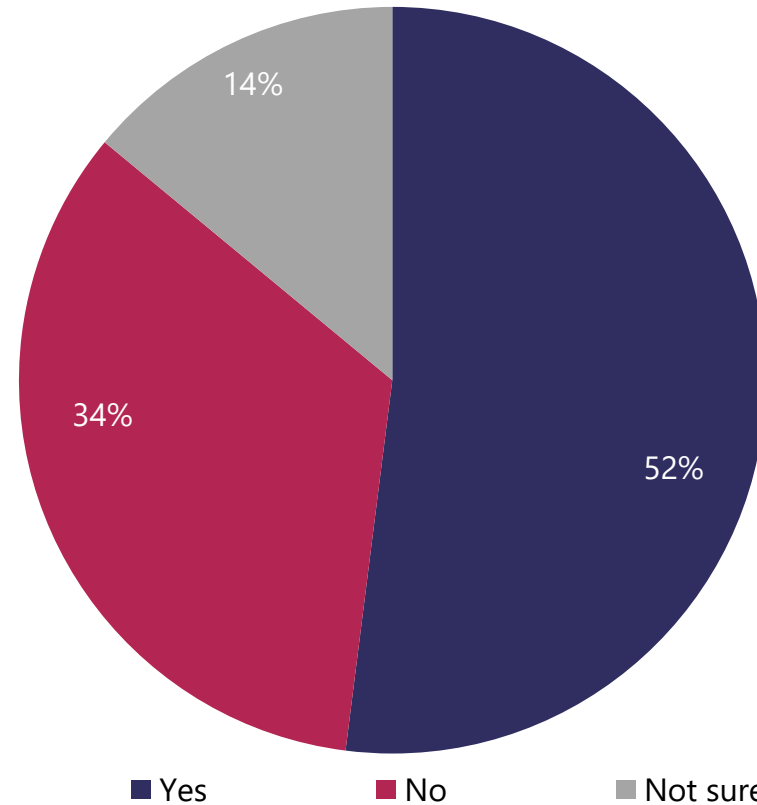


Q17. "In general, how important is it to you that you know where drinks brands come from and where they're made?" (n=501)

# Cider Drinker Habits: Japan

**Only just over half of Japanese respondents** consider themselves familiar with alcoholic ciders. **One third do not know the concept exists** in Japan.

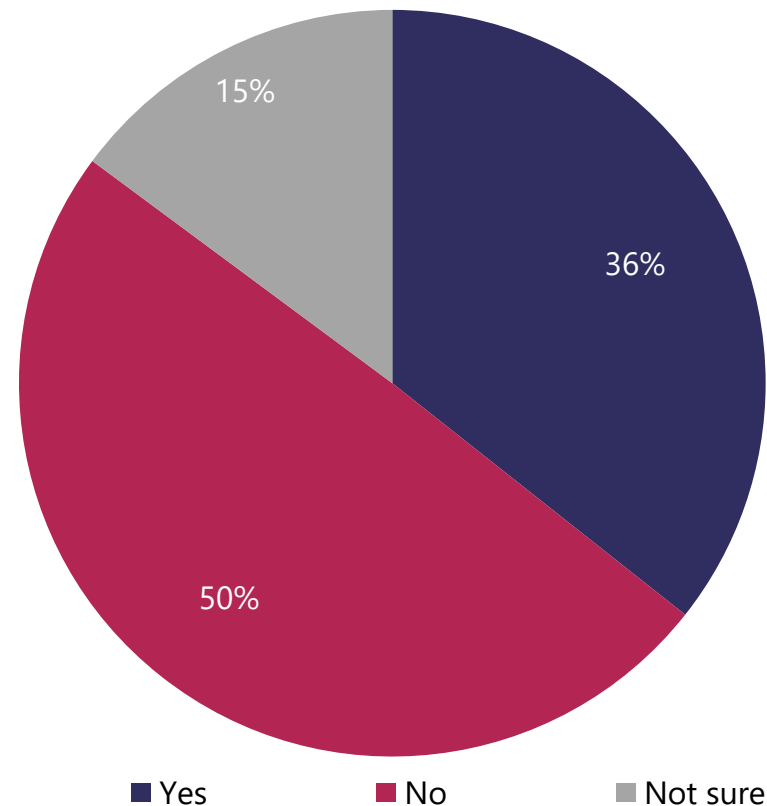
### Knowledge of Cider as a Concept



Q19. "Did you know that hard (alcoholic) ciders - shiidoru were available in Japan?" (n=501).

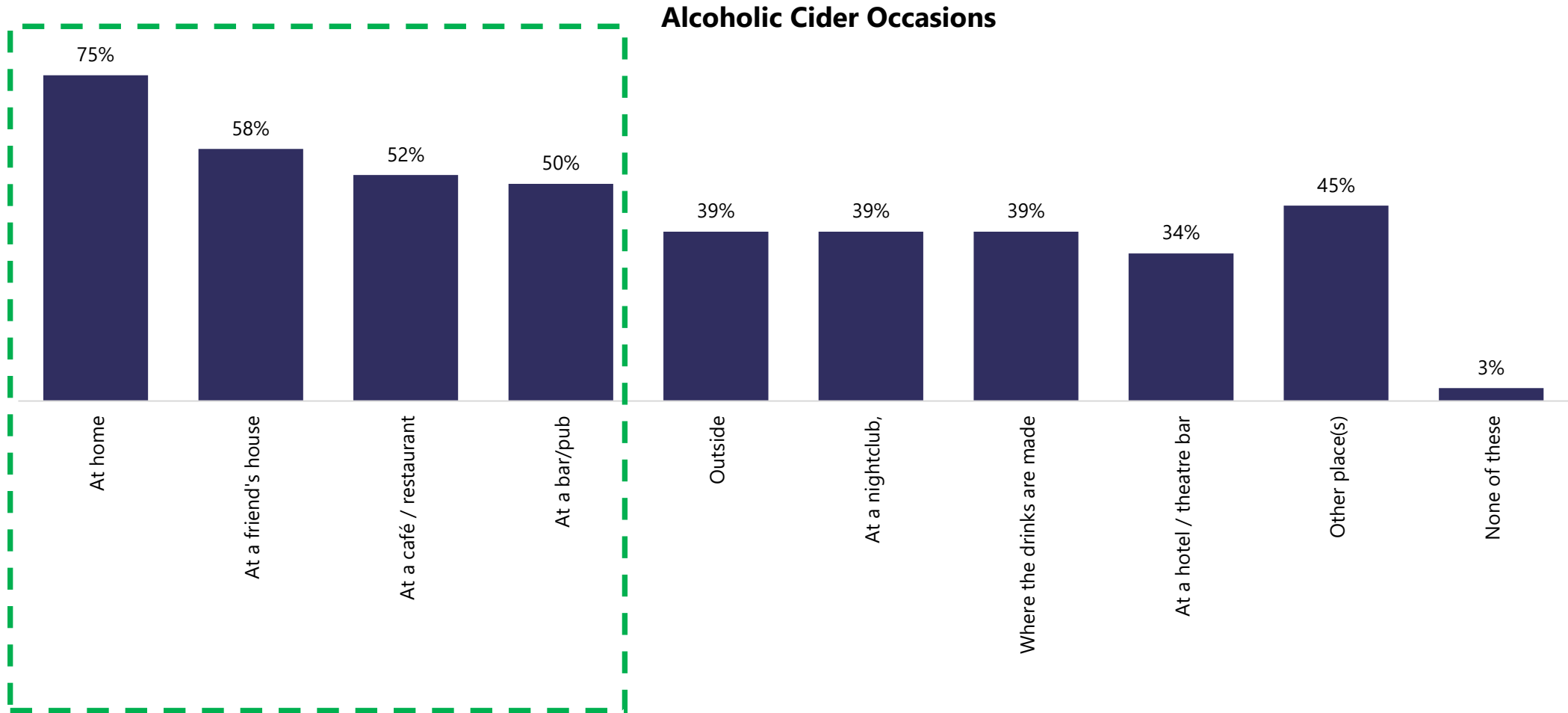
Only **one third of respondents knew there were Japanese-made alcoholic cider brands**, with half of respondents completely unfamiliar.

### Knowledge of Japanese Cider



Q20. "And were you aware that there are Japanese brands of hard (alcoholic) ciders - shiidoru?" (n=501).

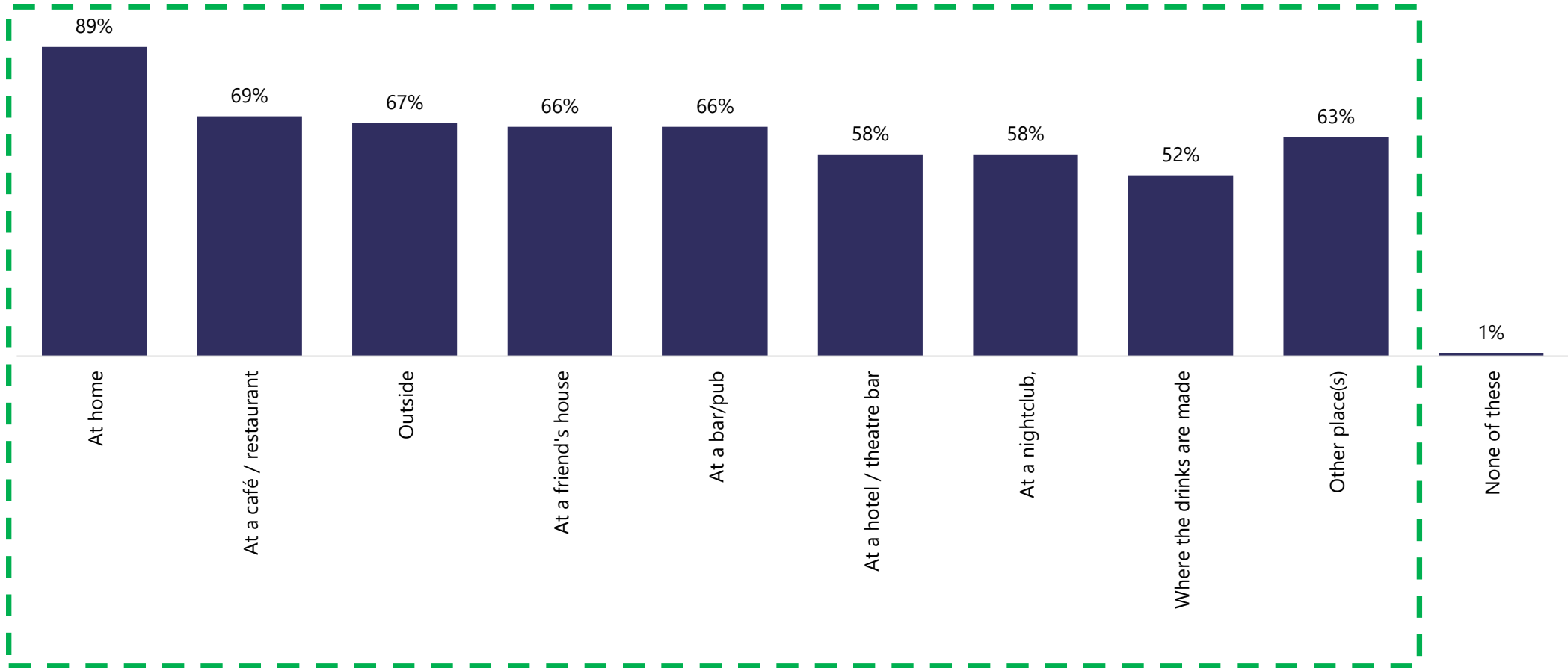
For the relatively few respondents who consider themselves cider drinkers there are **significant mentions of consumption in both off- and on-premise environments**, including notably cafés/restaurants, ahead of pubs/bars.



Q12. "Where do you drink : Hard (alcoholic) ciders – shiidoru? Please select all relevant places and events." (n=64) (Multiple response)

**For illustration**, when asked about consumption occasions for the leading alcoholic drinks category mentioned (Question 7 – **mainstream beers, lagers and ales**) consumption **in-home is ubiquitous** with almost 90% of respondents, but all other occasions tested also had a significant number of mentions. **Cider could, therefore, theoretically break into all of these.**

### Mainstream Beers, Lagers & Ales Occasions

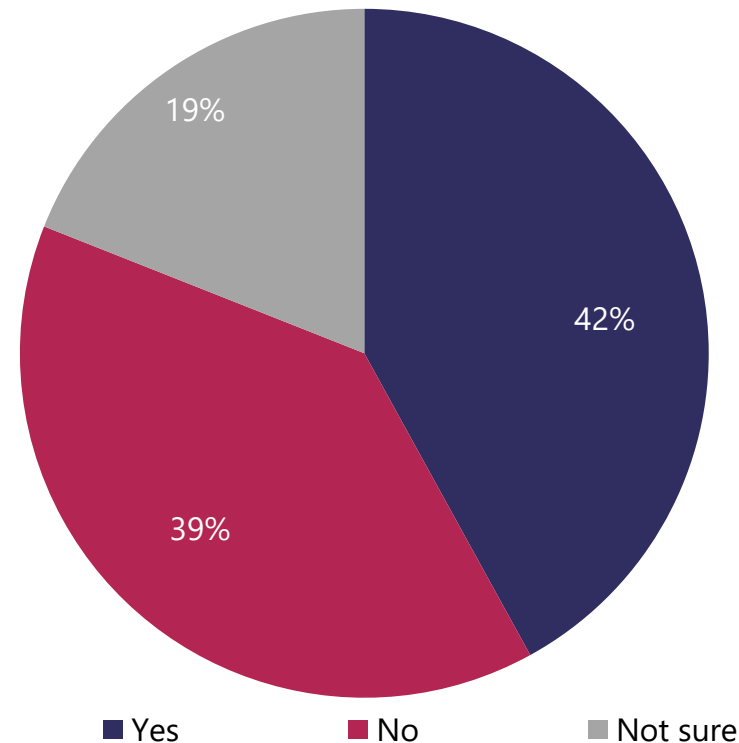


Q12. "Where do you drink : Mainstream beers, lagers, and ales." (n=300) (Multiple response)



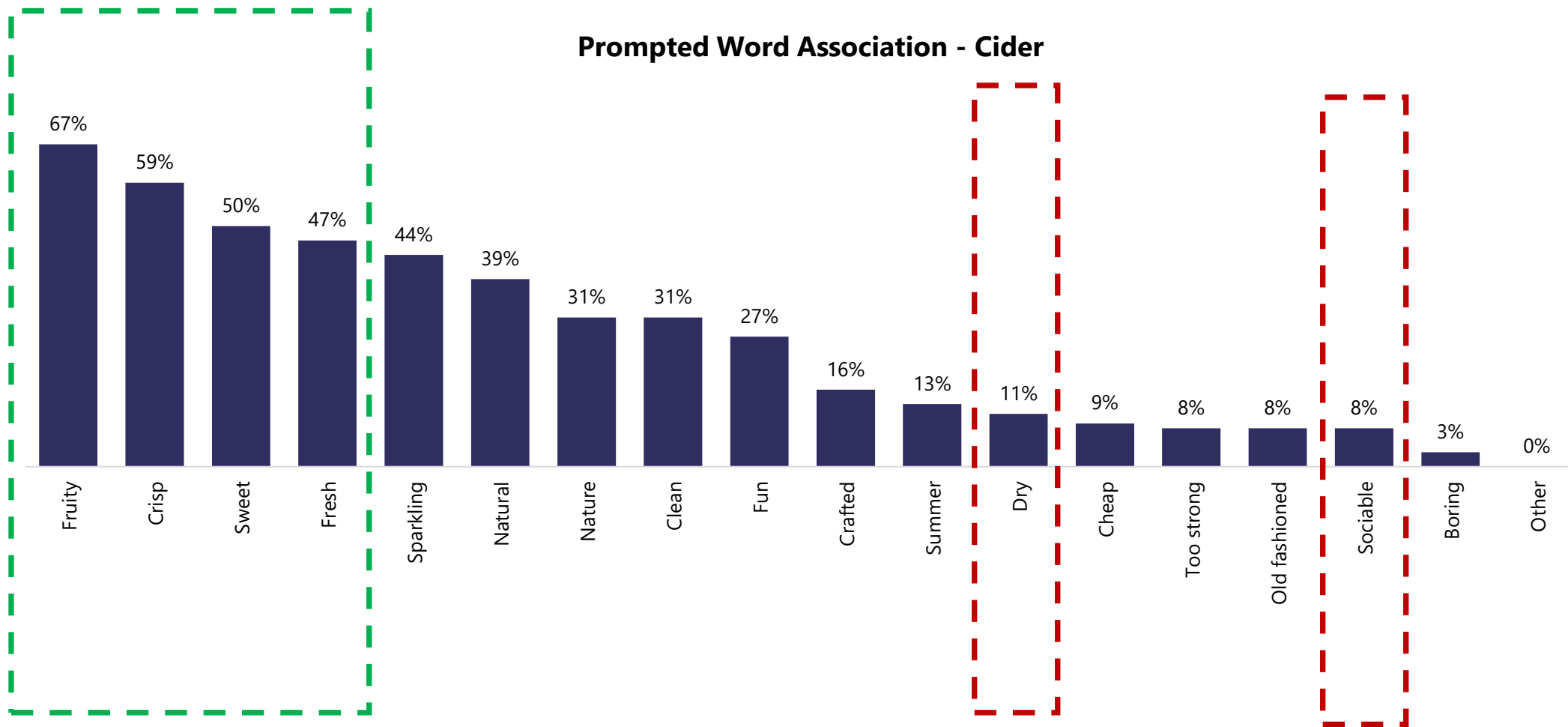
Among non-cider drinkers, **42% of Japanese respondents consider themselves curious about alcoholic cider**. 39%, however, rule out alcoholic cider consumption.

### Non-Cider Drinkers: Likelihood of Trying Alcoholic Cider



Q11. "There are ciders with alcohol on the market ('shiidoru'). Would you consider drinking cider with alcohol?" (n=430). Respondents who do not drink alcoholic cider.

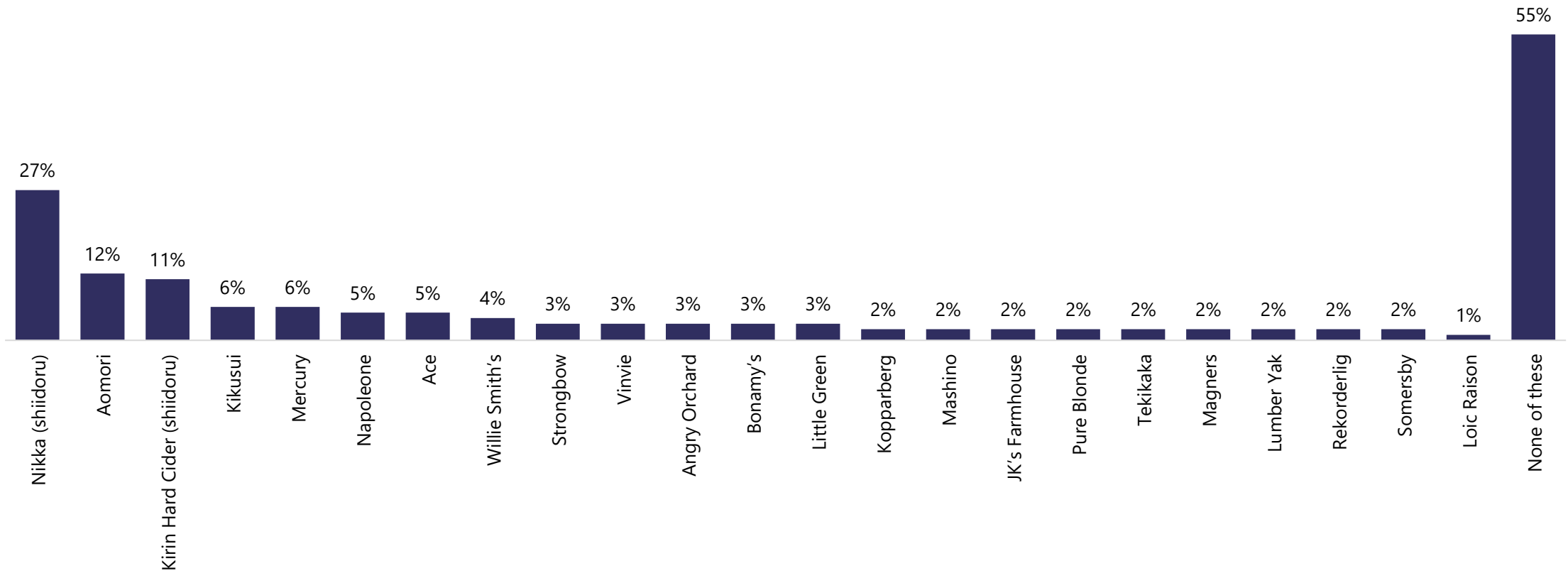
Among the active cider drinkers in this survey **'fruity', 'crisp', 'sweet' and 'fresh'** are significant mentions – note that **'dry' is not**. **'Sociable'** is also **not a word closely associated with cider**, although **'fun'** is. .



Q21. "You mentioned earlier that you drink hard (alcoholic) cider - shiidoru. When you think about cider, which of these words come to mind??" (n=64) (Multiple response)

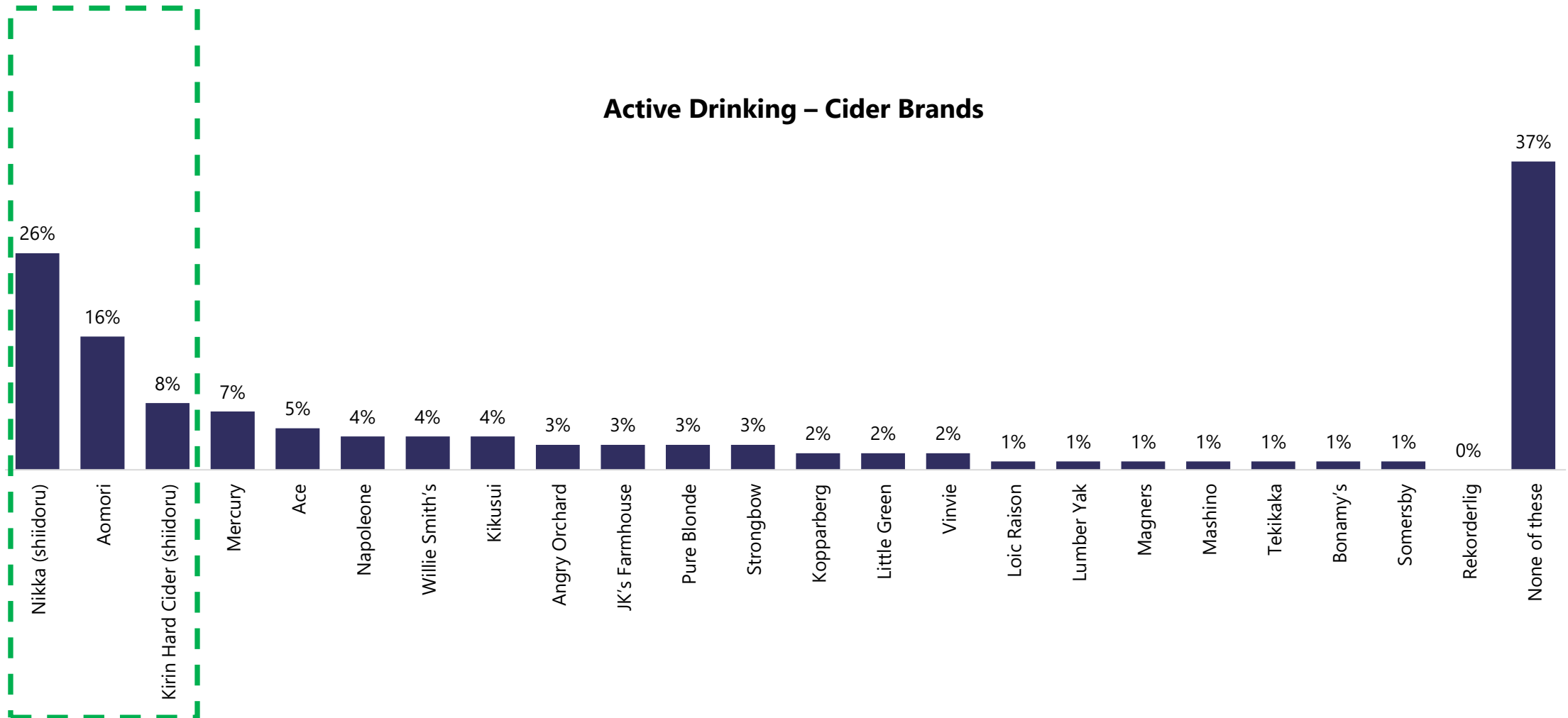
**Apart from Nikka**, recognition rates for any cider brands, whether mainstream, craft, domestic or imported, are **low** among Japanese respondents, and in many cases so low as to be statistically unimportant. More than half of respondents profess to **not recognise any cider brands**, including the leading ones by volume (Nikka and Kirin).

**Prompted Awareness – Cider Brands**



Q25-1. "Looking at the list of hard (alcoholic) cider - shiidoru brands below, which, if any, are you aware of?" (n=501)

With 58 mentions **Nikka** is the only cider brand that is claimed to be drunk by a statistically strong enough proportion of the sample that claims some awareness of brands. Active drinking of most other brands is claimed by only a handful of people, with **Japanese brands at the forefront**. Willie Smith's amounts to 9 mentions out of 501.

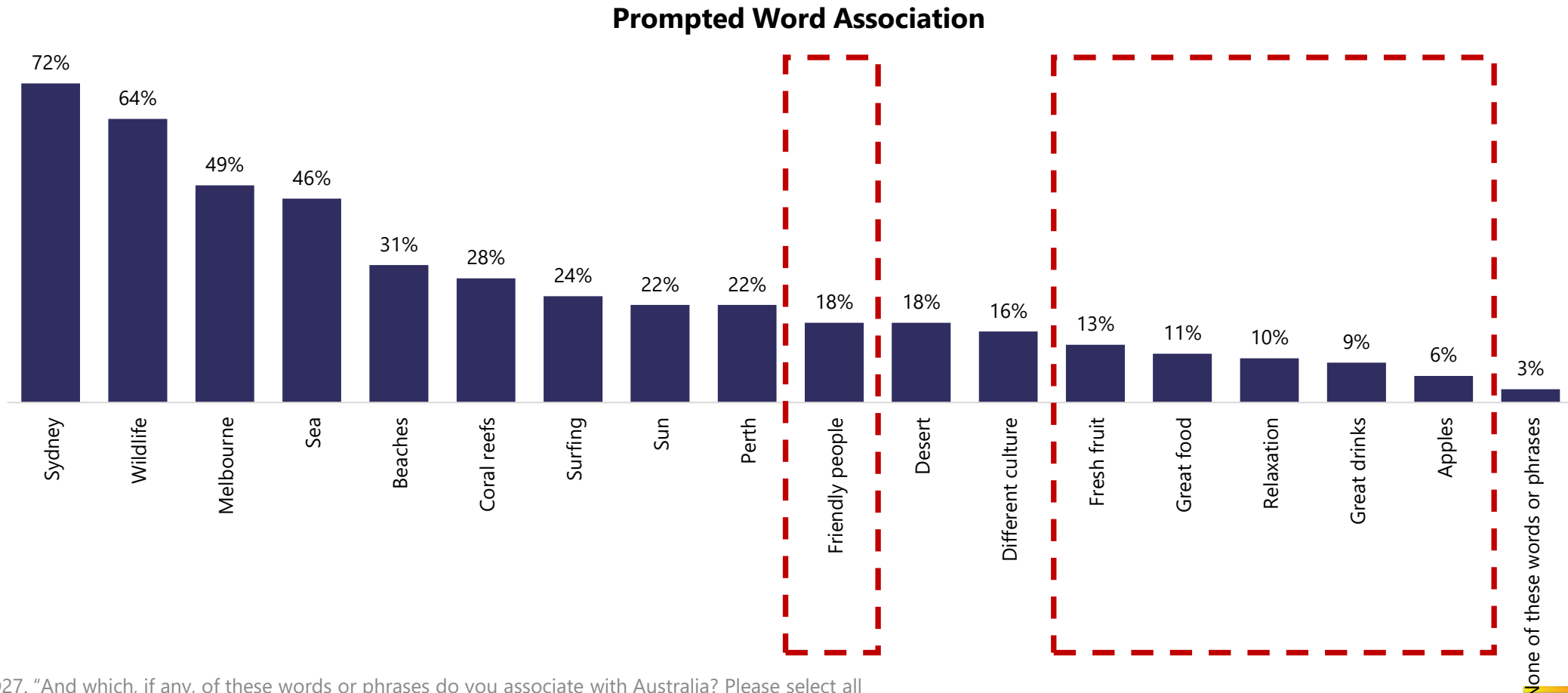


Q25-2. "And which, if any, do you currently drink?" (n=224) – brands displayed that were answered with "aware of" in Q25-1

# Attitudes towards Australia and Australian Cider: Japan

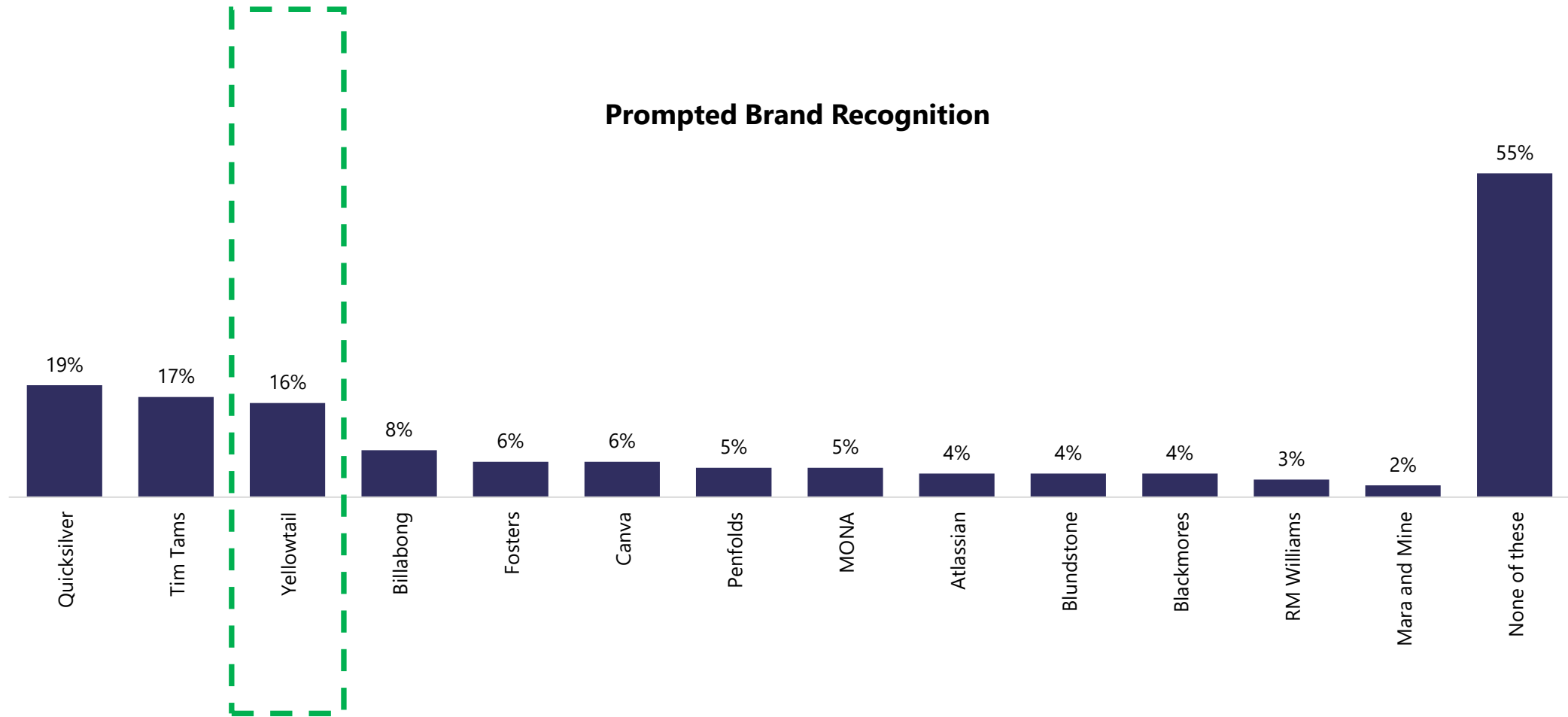


Food, drink and indeed fruit and apples are also relatively low in terms of **prompted** word association. Beyond 'Sydney' and 'wildlife' word associations are low in general. Note that '**friendliness**' and '**relaxation**' are remarkably low.



Q27. "And which, if any, of these words or phrases do you associate with Australia? Please select all associations, even if you've mentioned them in the previous question" (n=501)

Recognition of Australian brands among Japanese respondents is generally low. **Yellowtail** is the leading drinks brand, but low at only 16% of respondents. Foster's and Penfolds recognition is insignificant. Most respondents professed not being familiar with **any** of the brands tested.

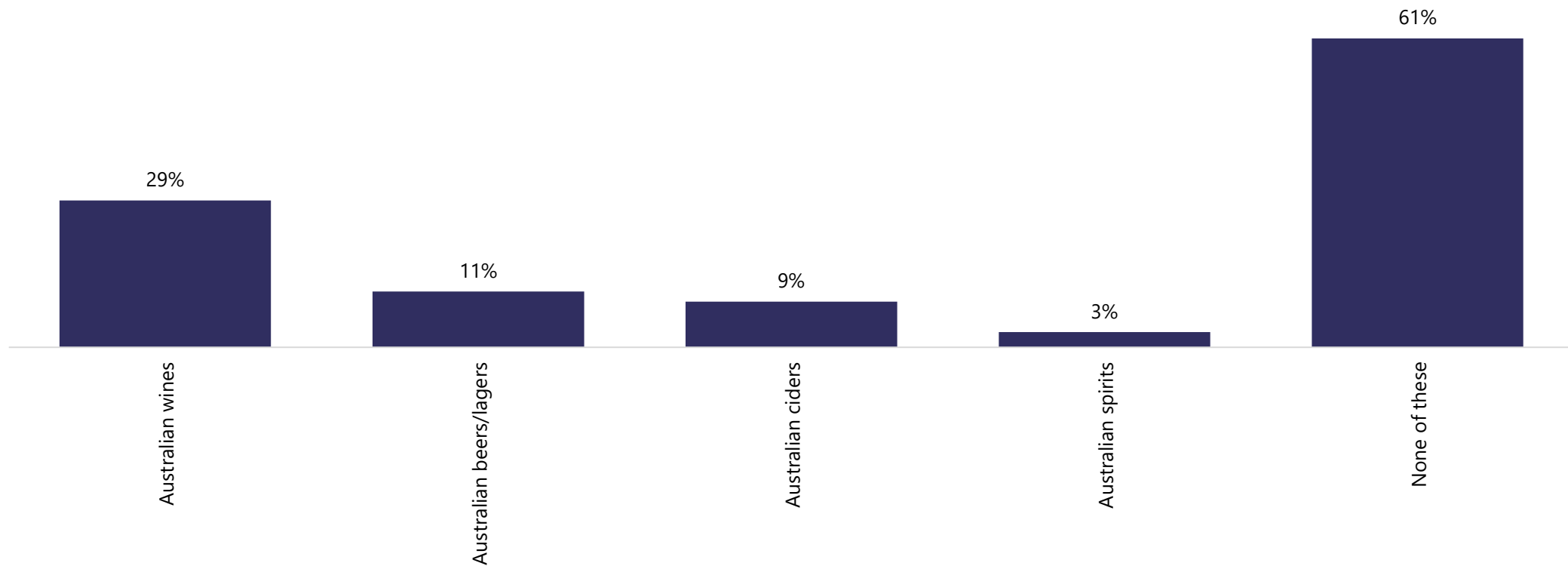


Q28. "Which, if any, of these Australian brands are you aware of?" (n=501)



Almost **two thirds of Japanese respondents claim not to drink any Australian beverages**. Just under one third say that they drink Australian wines, with other beverage types gaining very low mentions.

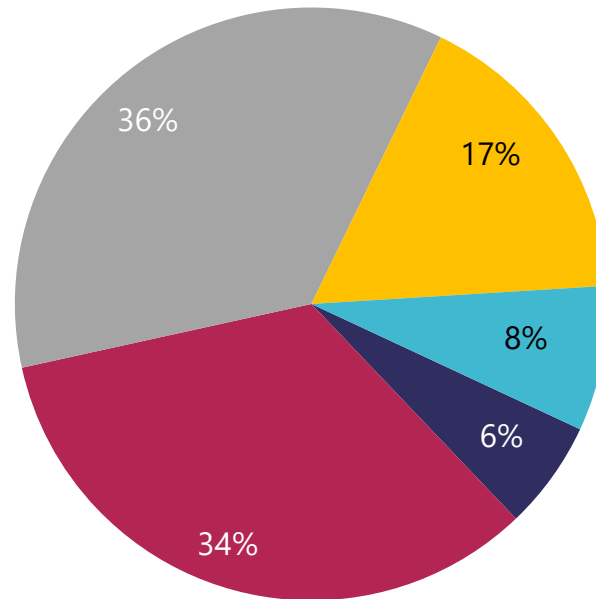
### Claimed consumption of Australian alcohol



Q29. "Do you drink...?" (n=501)

Japanese respondents are **decidedly ambivalent** about the likelihood of trying Australian ciders. Only 6% profess themselves enthusiastic, a **combined 40% are mostly positive**. One quarter of respondents say they are unlikely to try.

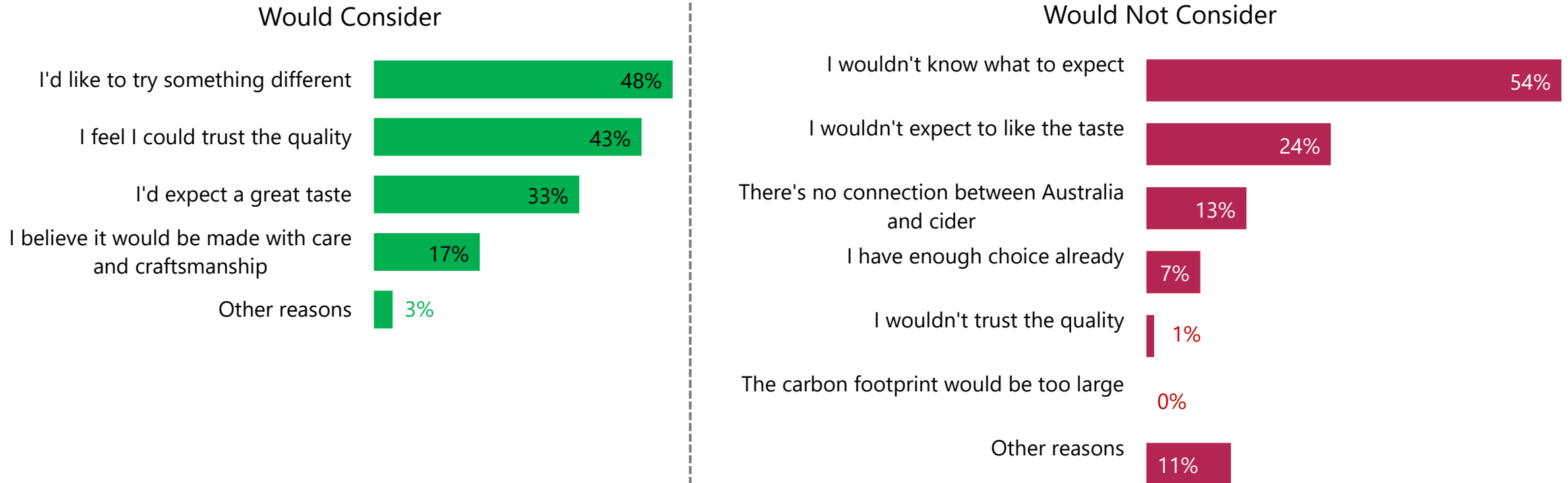
### Likelihood of considering Australian Cider



- Definitely would
- Probably would
- Not sure if I would or wouldn't
- Probably wouldn't
- Definitely wouldn't

Q30. "M30 How likely would you be to consider Australian hard (alcoholic) ciders - shiidoru?" (n=501)

**Variety and adventurousism** as well as **good perception of Australian quality** is at the forefront of Japanese respondents willing to consider Australian ciders. The many, however, who would **not** consider trying Australian ciders mainly cite **low expectations** as their main reason.

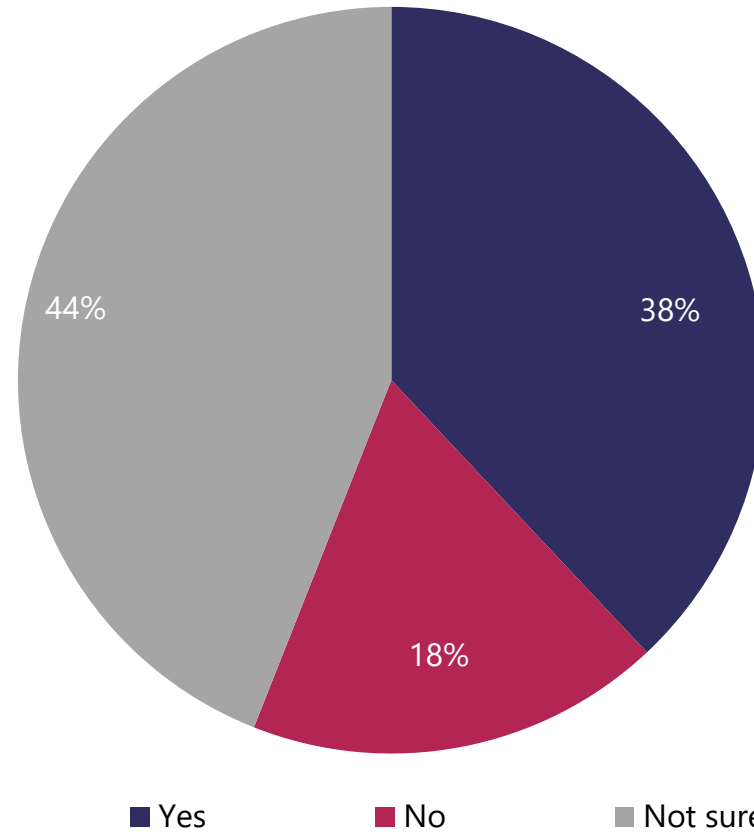


Q31. "And why do you say you would consider Australian hard (alcoholic) ciders - shiidoru?" (n=199) – respondents answering "definitely would" or "probably would" to Q30

Q32. "And why do you say you wouldn't consider a Australian hard (alcoholic) cider?" (n=123) - respondents answering "probably wouldn't" or "definitely wouldn't" to Q30

While **more than a third** of Japanese respondents have a **positive reaction** to the Cider Australia authenticity logo there is a strong degree of **ambivalence** among almost half of respondents, and just under a fifth of respondents deemed themselves untouched by the logo.

Cider Australia Logo



Q33. "Please look at this image. If you saw this on an Australian hard (alcoholic) cider - shiidoru brand, would that make you more likely to consider Australian hard (alcoholic) cider - shiidoru? (n=501)"

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## About the IWSR

The IWSR is the leading source of data and intelligence on the alcoholic beverage market. The IWSR's database, essential to the industry, quantifies the global market of wine, spirits, beer, cider, and mixed drinks by volume and value in 157 countries, and provides insight into short- and long-term trends, including five-year volume and value forecasts. The IWSR tracks overall consumption and trends at brand, price segment and category level. Our data is used by the major international wine, spirits and beer companies, as well as financial and alcoholic beverage market suppliers.

The IWSR's unique methodology allows us to get closer to what is actually consumed and better understand how markets work. Our analysts travel the world in order to meet more than 1,600 local professionals to capture market trends and the 'why' behind the numbers.

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