

Trends of alcoholic beverages in Japan and a questionnaire survey of consumer motives for choice

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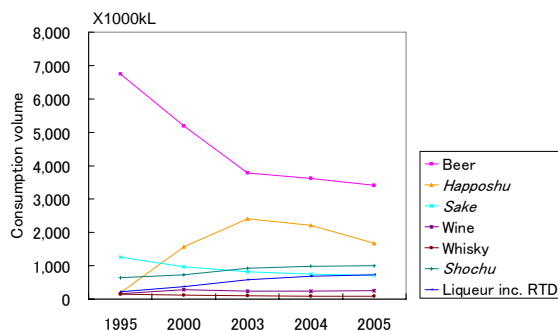
Abstract

The total alcohol consumption in Japan has been saturated from 1995 up to now. The consumption of beer, whisky, and sake has kept decreasing in recent years. However there are signs that the reduction has bottomed out. The trends indicate that there might be new consumers and others who increased drinking.

To reveal these backgrounds, we carried out a web questionnaire survey of consumers, who increased the drinking amount and / or frequency in this year.

Using a 'free answer' questionnaire for them, we investigated their motives for their choice of alcoholic drinks. The data were analyzed by text mining procedures. The results show there are significant differences between beer and whisky.

Trends of alcoholic beverages consumption in Japan



Methods

1. 3steps web questionnaire survey

- 1st step : Selection of people who drank alcoholic beverages last month
Sample size : 55392
- 2nd step : Selection of people who increased drinking amount and / or frequency in this year
Sample size : 38433
- 3rd step : Survey of their behaviors and motives
Sample size of beer consumers : 1038
Sample size of whisky consumers : 917

2. Research period: February 2007

3. Analysis

- Multiple choice answers -> Cross tabulation
- Free answers -> Text mining
- Classification of answers based on their content
- Performing word frequency counts

Results

1. What kind of alcoholic beverages did you increase drinking in this year ?

	Total	Male				Female			
	[Age]	20	30	40	50-	20	30	40	50-
n =	38433	4013	6035	6512	3851	3628	5376	5467	3551
Beer	22.1	36.1	24.8	19.6	16.3	28.5	22.1	16.1	15.3
Happoshu etc	22.6	25.9	26.0	25.2	20.2	19.4	23.1	20.7	16.5
Sake	11.1	16.0	10.5	12.1	15.0	11.3	8.1	7.6	10.0
Wine W	7.0	6.7	5.0	4.7	4.4	11.3	9.3	7.7	9.1
Wine R	10.8	9.5	7.5	8.8	9.0	13.3	12.4	12.7	16.0
Whisky	3.9	7.5	4.4	5.3	5.5	2.7	1.8	2.0	1.9
Brandy	1.4	3.4	1.8	1.4	1.2	1.5	0.9	0.7	0.7
Shochu	22.2	25.6	27.0	29.4	30.5	18.3	15.3	14.9	13.8
RTD	23.4	31.3	19.4	14.4	6.7	43.5	30.9	27.9	16.7
Others	3.3	3.7	2.6	1.6	1.4	6.9	4.7	3.8	2.6

2. What type of beer did you increase the consumption of?

Type	Total	Male				Female			
	[Age]	20	30	40	50-	20	30	40	50-
n =	1038	128	127	128	134	130	131	135	125
Regular	75.3	85.2	78.0	68.0	76.1	78.5	77.1	66.7	73.6
Premium	32.5	38.3	32.3	27.3	27.6	32.3	38.9	29.6	33.6
Stout	13.8	16.4	12.6	10.2	17.2	10.8	14.5	12.6	16.0
Seasonal	18.4	18.8	9.4	11.7	9.0	20.0	27.5	23.7	27.2
Chilled (Specialty)	4.3	7.0	1.6	3.1	5.2	4.6	5.3	0.0	8.0
Import	6.6	8.6	3.9	1.6	5.2	11.5	6.9	7.4	8.0
Others	1.8	0.0	0.0	3.1	2.2	0.0	3.1	3.0	3.2

Conclusions

For new beer consumers

- Breweries should provide them not only high quality regular products but also new attractive products.
- It is necessary to promote food matching for market development.
- It might be effective to collaborate with sports events.

For new whisky consumers

- Distilleries should provide them more information about whisky and whisky culture.
- It is necessary to study relaxed feelings derived from whisky more seriously.
- It might be effective to collaborate with chocolates, music concerts and movies

3. Why have you increased the consumption of beer?

Reason	Total	Male				Female			
	[Age]	20	30	40	50-	20	30	40	50-
Work, Colleague, Client	9.8	19.5	11.1	6.3	8.9	16.9	9.9	2.9	5.6
Increased opportunities	8.6	13.3	6.3	8.6	3.7	12.3	11.5	8.1	4.8
Delicious	8.5	3.9	10.2	8.6	9.0	6.2	6.9	7.4	16.0
Family, Home, Parents, Couple	7.8	3.9	0.8	3.9	5.2	10.8	16.0	8.1	13.6
Preference change	6.7	10.2	7.9	1.6	3.0	12.3	9.9	3.7	5.6
Pub, Restaurant	6.2	3.9	2.4	9.4	3.7	4.6	9.2	7.4	8.8
Stress, Relaxation	5.7	10.2	7.9	4.7	3.7	4.6	6.1	3.0	5.6
Premium beer	5.0	3.1	6.3	6.3	7.5	0.8	5.3	5.9	4.8
New products	4.9	3.9	3.9	6.3	6.0	1.5	5.3	8.1	4.0
More delicious than happoshu	4.4	3.1	7.1	4.7	5.2	0.8	7.6	3.0	4.0
Friend	4.2	6.3	3.9	0.8	0.7	9.3	3.9	4.4	4.0
Taste	4.1	6.3	1.6	7.8	3.7	2.3	3.8	4.4	3.2
Food, Meal, Dinner	3.9	0.8	1.6	3.9	3.0	4.6	6.2	4.5	6.4
Improved quality	3.1	3.9	3.1	2.3	4.5	2.3	1.5	5.2	1.6

4. What type of whisky did you increase the consumption of?

Type	Total	Male				Female			
	[Age]	20	30	40	50-	20	30	40	50-
n =	917	182	178	178	157	60	62	51	49
Blended	35.6	35.2	33.1	34.8	44.6	31.7	29.0	27.5	40.8
Blended : Import	21.2	24.2	21.9	17.4	21.7	23.3	27.4	5.9	24.5
Single Malt	47.3	47.3	52.2	43.8	36.9	55.0	61.3	49.0	46.9
Single Malt : Import	34.0	36.8	35.4	30.9	29.3	41.7	41.9	23.5	36.7
American : Import	31.1	28.0	34.3	34.3	24.2	25.0	40.3	41.2	26.5

5. Why have you increased the consumption of whisky?

Reason	Total	Male				Female			
	[Age]	20	30	40	50-	20	30	40	50-
Delicious	18.1	20.3	22.5	18.5	10.2	13.3	14.5	25.5	20.4
Bar, Club, Stand	6.3	7.1	7.3	4.5	4.5	11.7	9.6	2.0	6.1
Increased opportunities	5.6	5.5	5.6	3.9	4.5	11.7	11.3	3.9	2.0
Low price, Inexpensive	5.5	3.3	5.1	8.4	7.6	0.0	8.1	3.9	2.0
Friend	5.2	8.2	3.9	0.0	2.5	20.0	9.7	3.9	4.1
Found, Understood	5.0	6.6	4.5	6.2	1.9	5.0	6.5	3.9	6.1
Work, Colleague, Client	4.8	7.6	3.9	5.7	2.5	10.0	1.6	2.0	2.0
Family, Home, Parents, Couple	4.8	2.7	1.7	5.6	1.9	8.3	16.2	9.8	6.1
Taste	4.6	5.5	5.6	4.5	5.7	1.7	3.2	2.0	2.0
Preference change	4.1	4.9	5.6	5.1	3.2	3.3	3.2	0.0	2.0
Gift, Present	4.0	4.4	3.9	2.2	1.3	3.3	11.3	7.8	6.1
Malt	2.7	3.3	1.7	3.4	5.1	1.7	0.0	2.0	0.0
Aroma	2.6	2.7	2.2	2.2	2.5	0.0	3.2	5.9	4.1
How to drink	2.5	2.2	2.2	2.2	3.8	1.7	3.2	2.0	2.0
Health, Calorie, Diet	2.3	0.0	3.4	2.2	3.8	1.7	3.2	3.9	0.0

6. When and / or where would you like to drink?

Word	Beer	Whisky
	Food	
Dinner, Meal	13.2	7.5
Food, Dish	8.4	1.3
After dinner	0.2	1.6
Snack	1.2	0.5
Chocolate	0.0	0.9
Cigar, Cigarette	0.0	0.5
Hobby		
Music, Jazz, Rock, Classical, Band	0.0	4.0
TV, Video, DVD	0.7	2.1
Movie	0.3	1.4
Reading, Book	0.3	1.1
PC, Internet, Net surfing	0.2	1.0
Relationship		
Friend	5.6	2.7
Myself, Alone	0.4	4.0
Family, Couple	1.4	1.2
Physical		
Thirst, Throat	16.7	0.7
Sweat	4.2	0.0
Hot	7.9	0.2
Cold	0.1	2.2
Shower, Bath	13.5	1.3
Sports	4.8	0.0
Sleep, Nightcap	2.0	8.3
Feeling		
Tired	9.1	7.0
Stress, Irritation	4.0	1.9
Relaxed	1.7	8.3
Slow down	1.7	12.4
Enjoy	0.4	2.8
Happy, Grateful	1.0	1.2
Lonely	0.0	0.4