

Whisky Landscape in Urban Japan:

Qualitative Research Report



Radma Research stepped in to carry out a qualitative deeper introspection into highball consumption occasions, at both izakayas and home.

Whisky is one of the largest categories for spirits in Japan and has witnessed significant growth in the recent years.

However, the whisky category in Japan is fragmented considering the magnitude of brands vying for consumer attention and accolades in equal measure, and hence overall growth. It is little wonder then, that the category also encourages cut-throat competition in comparison with other spirits categories.

It is then, imperative for every brand to understand the consumer journey within the category, right from initial engagement or “recruitment” into the brand story, and its evolution into perception of the category as a whole in the context of the world of spirits at large in a quantitative / qualitative hybrid engagement.

While a quantitative analysis provides with a bird’s eye view of the landscape, it is qualitative research that informs with rich information in elaborating existing theories as well as intuition. Qualitative research allows the creation of more reliable hypotheses and offers direction to future research.

This research is based on a 20 sample size of participants and is best used for direction of strategy rather than to deduce hard projections.

Radma Research stepped in to carry out a qualitative deeper introspection into highball consumption occasions, at both izakayas (“a type of Japanese bar in which a variety of small, typically inexpensive, dishes and snacks are served to accompany the alcoholic drinks”; source: Oxford Languages) and home. This introspection involved enabling the comprehension of on-premise occasions for Bacardi to target a wider audience despite the perceivable niche:

Moment-to-moment experiences; the ceremony involved, the occasion, company, time of day, quantity, reasons, etc.

At-home whisky/whisky highball consumption patterns and habits.

Challenge

Consumer profiles in context of the COVID-19 driven lockdown

COVID and changes in working routine caused by the work-from-home norm made consumers stay at home for long periods, often alone.

Socially conservative culture

Compared to several world cultures, the Japanese people are often hesitant to responding to questions about personal habits. They place high importance on age-related social order and conformism. As a result, research, even if qualitative, may take longer in this society, even if limited to Tokyo and Osaka as in this case.

Approach

An Online Discovery Board was instated to tap into a geographically diverse group of consumers in two of the largest commercial city regions of Japan – Tokyo and Osaka metropolitan areas. The board invited participation from the comfort of the participants' own familiar environments (often homes) on an asynchronous platform on a single day as a scheduled event.

Results

1. Premium whisky is more likely to be served as a highball base at higher grade or image izakayas with a narrow-yet-deep assortment of spirits and food at a relatively higher price, also determining the class of alcoholic beverage brand including whisky.
2. Guests strongly influence decisions of what to drink in groups. It is rare for individuals to visit them alone.
3. The placement of the drink on the menu as well as other senior companions (especially the "connoisseur") impact selection of highball spirit.
4. Highball consumers do not perceive drinks and spirit brands in the same vein – rather, merely a product.
5. In-home consumption of whiskey saw a marked increase during the months of COVID-19 led lockdown/ work from home situation.
6. The comfort of home combined with more time led to higher appreciation and development of taste within the premium whiskey segment.

Why Radma?

We at Radma Research possess the ability to sift consumer data that is key to strategic direction of businesses **across sectors and global geographies**. Serendipitous or reiterative, we constantly pre-empt challenges in market research and overcome them in a swiftly changing world that is faced with various socio-economic and environmental alterations. **A few elements that set us apart:**

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Qualitative ICT researchers and IT & business experts across industry for the highest quality of actionable results no matter how tall the ask

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