Agriculture and Agri-Food Canada | Agriculture et Agroalimentaire Canada

2022 Vietnam Consumer Perceptions of Canadian Food and Seafood Products

Quantitative Survey Results Final Report

Prepared for Agriculture and Agri-Food Canada

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Ce rapport est aussi disponible en français

Canada

2022 Vietnam Consumer Perceptions of Canadian Food and Seafood Products Quantitative Research

Prepared for Agriculture and Agri-Food Canada

Supplier Name: Leger Marketing Inc.

March 15, 2022

This public opinion research report presents the results of an online survey conducted by Leger Marketing Inc. on behalf of Agriculture and Agri-Food Canada. This research was conducted in February and March 2022.

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Executive summary

Leger Marketing Inc. (Leger) is pleased to present Agriculture and Agri-Food Canada (AAFC) with this report on findings from a quantitative survey designed to learn about how Vietnamese consumers perceive Canadian food and seafood products.

Background and objectives

This market research with Vietnamese consumers collected baseline consumer perceptions and stated behaviours of Canadian products and processes, and evolving market demands to help inform the upcoming strategic approach for the Canada Brand marketing campaign. Specific objectives of the research include, but are not limited to, providing AAFC with data on:

- Vietnamese food purchasing behaviours
- Vietnamese media consumption habits
- Canadian agriculture, food and seafood product awareness
- Canadian food and seafood product purchase frequency
- Demand for Canadian food and seafood products

The contract value for this project was $83,395.82 including HST.

Intended use of the research

The findings of the research are used in the development of policies, programs and initiatives, to improve communications and to better serve clients. The results are used to gain critical insights into the opinions, issues and challenges of marketing Canadian food products in Vietnam.

Methodology

This public opinion research was conducted via a hybrid approach, with mainly online completed interviews with some Computer Aided Web Interviewing (CAWI) technology, and some face-to-face interviewing. Fieldwork for the survey was carried out from February 26 to March 15, 2022. A total of 2,301 Vietnamese consumers, between the ages of 20 and 54 years old, who are fully or partly responsible for grocery shopping in their household with demographic characteristics reflective of the Vietnamese population were surveyed. The sample was drawn randomly from a web panel and face-to-face samples and included 2,000 Vietnamese consumers with demographic characteristics representative of the population, and a booster of 301 Vietnamese consumers who purchased Canadian food or seafood products in the past year. The overall response rate for the survey was 16%.

Using data from the most recent General Statistics Office of Vietnam's 2019 Census, the weighting was done by city, urbanity, and age group to ensure the most representative sample within each region and overall.

Leger adheres to the most stringent guidelines for quantitative research. The survey instrument was compliant with the Standards of Conduct of Government of Canada Public Opinion Research.

A complete methodological description is provided in Appendix A of this document.

Overview of the findings

Food shopping

Vietnamese consumers do their shopping on a regular basis, either every day (for a third of them: 34%) or several times a week (for half of them: 47%).

Three in four Vietnamese consumers have moderate monthly food spending (78%) – ranging from 3,000,001 to 15,000,000 vnd (roughly $165 to $830). Their food shopping is mainly done in-store (94%), with less than one in ten respondents saying they mainly shop online (6%). Local markets (44%) and major grocery store chains (33%) are the most popular establishments for grocery shopping.

Vegetables (96%), fruits (94%), and pork (92%) are the items that are most commonly bought on a weekly basis, closely followed by fish (84%), chicken (82%) and beef (75%). Cheese and other dairy (49%), grains (35%) and flour (27%) are bought on a weekly basis by less than half of Vietnamese consumers.

Vietnamese consumers appear to be very health conscious and aware of the food they purchase and eat, as a vast majority of them stated they are thinking carefully about what they eat (94%) and are regularly reading ingredient lists of their purchased products (90%).

In addition to that, Vietnamese consumers are very open to experimenting with food and cuisine: over eight in ten declared liking to try out new foods, recipes, and flavours (86%). Their openness towards new experiences in terms of food makes Vietnamese consumers an interesting market for Canadian food and seafood products, as openness is key when it comes to enjoying unfamiliar flavours and products.

International experiences

Over half of Vietnamese consumers (57%) have previously travelled abroad, and the proportion is higher among Ho Chi Minh (67%) and Da Nang (74%) residents, as well as among consumers with higher incomes (79%) and education levels (college/university: 68%, beyond: 91%).

Foreign countries are of interest to Vietnamese consumers for travel purposes (80%), and their food and cuisine (78%): around one Vietnamese respondent out of three said they are extremely interested in international food and cuisine (35%), and around half are somewhat interested (44%). Residents of Hanoi and Ho Chi Minh (91% and 83% respectively) set themselves apart by being significantly more interested in international food and cuisine, but also all other aspects of foreign countries.

International food purchasing

Vietnamese consumers care a lot about food safety standards (87%), quality (86%), and health (86%). But in addition to this, international food products must be sustainable (77%), diverse (76%), and use new technologies and innovative processes (74%). These criteria are therefore mandatory for Vietnamese consumers to trust and purchase Canadian food products.

A vast majority of Vietnamese consumers have purchased international food products in the past year (85%). Around a third (37%) of Vietnamese consumers spend between 1% and 10% of their monthly household food budget on international food products, and around half (47%) spend between 10% and 75%. Since local markets are the key shopping establishment, consumer baskets are mainly comprised of local food items.

International foods are purchased on a monthly basis for most consumers (45%), but consumers with higher household incomes buy their food more frequently than those with low household incomes, as one in four (27%) of consumers with high household incomes purchase international food every week or more.

Regarding international food products, Vietnamese consumers tend to purchase food from other Asian countries, with South Korea (63%) and Japan (49%) being the main ones. Canadian products are bought by around one in four Vietnamese consumers who buy international products (26%). Hanoi residents (39%) and higher-income households (37%) are more likely to buy Canadian products than other subgroups.

Canadian products specifically are bought on a monthly basis mainly (42%), but they are bought more frequently by higher income earning respondents (47%), and Ho Chi Minh (48%) residents.

Canadian meats like beef and pork (70%) are the most popular Canadian items bought by Vietnamese consumers who purchased products from Canada, followed by fruits and vegetables (50%) and seafood (47%).

The competitive set

Canada came in third after the United States (81%) and Australia (75%) in terms of interest for international food products, but not far behind: seven in ten respondents were interested in buying Canadian products (71%). Canada's reputation has definitely helped anchor it in Vietnamese minds in terms of international products, as it is rated better than other countries on most surveyed criteria: high food safety standards (57%), high quality (55%), healthy and wholesome (54%) and sustainable (53%).

In terms of top-of-mind spontaneous mentions about Canada, most Vietnamese consumers think of maple trees (13%), landscapes (8%), and cuisine (7%). Education (7%), cold weather (7%), and tourism (6%) are also at the top of the list. Regarding Canadian food specifically, beef/beefsteak (9%), maple syrup (7%), and ham/bacon (6%) were the top three things that came to mind, but one in four consumers (25%) could not name anything. All mentions were brought up by a low proportion of Vietnamese consumers, which points to a superficial knowledge of Canadian food and seafood products: no single Canadian product stands out. It is also interesting to note that beef/beefsteak is a common top of mind mention for the other Commonwealth countries as well (United States: 18%, Australia: 25%, and New Zealand: 8%).

Among Vietnamese consumers, one in two people (50%) recall seeing a food product with a red maple leaf on it. Again, Da Nang (71%) Ho Chi Minh (60%) and Hanoi (55%) seem to be more open to international products as their residents are more likely to recall having seen a product with a maple leaf. When it came to an explicit specification that the food item came from Canada, the recall rate is six in ten (60%), and around seven in ten among consumers with higher incomes (73%), and residents of Da Nang (76%), Hanoi (70%), and Ho Chi Minh (68%).

Purchasing locations and inspiration

Regarding stores to shop for Canadian products, Shopee (34%), Lazada (22%) and Facebook (18%) were at the top of the list of online stores. Vinmart (37%), Aeon (24%), and Co.opmart (24%) were the most popular among brick and mortar stores.

When it came to food and cuisine, YouTube (70%), along with friends and family (65%) came out as the first sources of inspiration and information among Vietnamese consumers. TV cooking shows (50%), search engines (48%), and Facebook (48%) were also popular among half of the consumers. Around half of respondents said they bought food imported into Vietnam after reading or hearing about it from friends and family (51%) or on YouTube (48%). Word-of-mouth along with social media are likely key communication channels to promote Canadian products.

Notes on interpretation of the research findings

The views and observations expressed in this document do not reflect those of Agriculture and Agri-Food Canada. This report was compiled by Leger based on the research conducted specifically for this project. This research is not probability-based; therefore the results cannot be inferred to the general population of Vietnam.

Since a sample drawn from a web panel is not probabilistic in nature, margins of sampling error cannot be calculated for this survey. Respondents for this survey were selected from among those who have volunteered to participate/registered to participate in online surveys. The results of such surveys cannot be described as statistically projectable to the target population. The data have been weighted to reflect the demographic composition of the target population.

Political neutrality statement and contact information

Research Firm:

Leger Marketing Inc. (Leger)

Contract Number: 01B68-220927/001/CY

Contract Award Date: January 5, 2022

Leger Marketing Inc. hereby certifies that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Policy on Communications and Federal Identity and the

Directive on the Management of Communications. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate, or ratings of the performance of a political party or its leaders.

Signed:

Christian Bourque

Senior Researcher, Leger

Date: March 28, 2022

Introduction

This market research with Vietnamese consumers collected baseline consumer perceptions and stated behaviours of Canadian products and processes, and evolving market demands to help inform the upcoming strategic approach for the Canada Brand marketing campaign.

This public opinion research was conducted via a hybrid approach, with mainly online completed interviews with some Computer Aided Web Interviewing (CAWI) technology, and some face-to-face interviewing. Fieldwork for the survey was carried out from February 26 and March 15, 2022. A total of 2,301 Vietnamese consumers with demographic characteristics reflective of the Vietnamese population were surveyed. Eligibility criteria are the following: to be between the ages of 20 and 54 years old, and to be fully or partly responsible for grocery shopping in their household. The results are used to gain critical insights into the opinions, issues and challenges of marketing Canadian food products in Vietnam.

To best meet the objectives of this study, data has been cross tabulated with the most relevant variables to unravel significant differences among subgroups. The variables that were analyzed for crosstabulation are:

- **Age group**: 20 to 34, 35 to 54, 55 plus
- **Gender**: Male, female
- **Presence of children in the household**: Yes, no
- **Region**: Hanoi, Ho Chi Minh, Hai Phong, Khanh Hoa, Da Nang, Can Tho, other regions
- **Household monthly income**: low, moderate, high
- **Household monthly food spending**: low, moderate, high
- **Experience abroad**: Yes, no
- **Interest in international food and cuisine**: Interested, not interested
- **Purchase of Canadian food or seafood products**: Yes, no
- **Interest in buying Canadian food products**: Interested, not interested

If one or more categories are not mentioned in the detailed analysis, that means there are no relevant significant differences

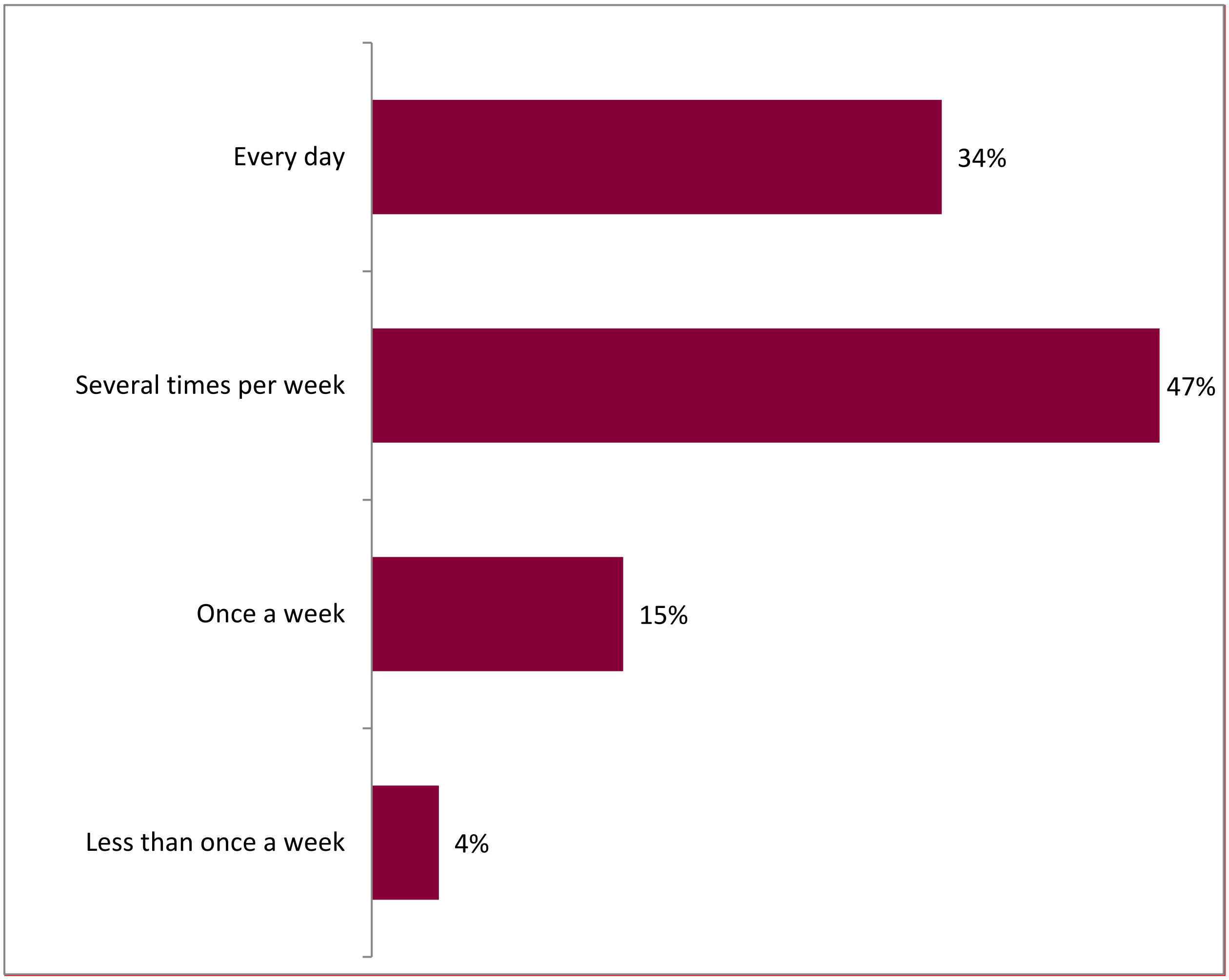
Detailed results

Food shopping

Frequency of food shopping

While a third of respondents said they shop for food every day (34%), around half said they do it several times per week (47%), and one in five respondents shop once per week or less (19%).

Figure 1: Frequency of food shopping



Q3: How often does your household buy food or seafood … Base: All respondents (n=2,301).

Certain segments of Vietnam's population are more likely than others to shop for food on a daily basis. Young Vietnamese consumers aged 20 to 34 (37%), women (39%), residents of Can Tho City (45%) and other regions of Vietnam (51%), as well as those living in suburbs (50%) and in small towns (63%) are among those who are more likely shop on a daily basis. Vietnamese consumers with low household incomes (47%) and those who have not had experience abroad (43%) are also more likely to make daily food purchases.

In contrast, men (51%), Vietnamese with children at home, residents of Hanoi (52%) and Da Nang (55%) are significantly more likely to purchase food at different times during the week, but not every day. Respondents with experiences abroad (51%) are also more likely to follow this pattern of food shopping.

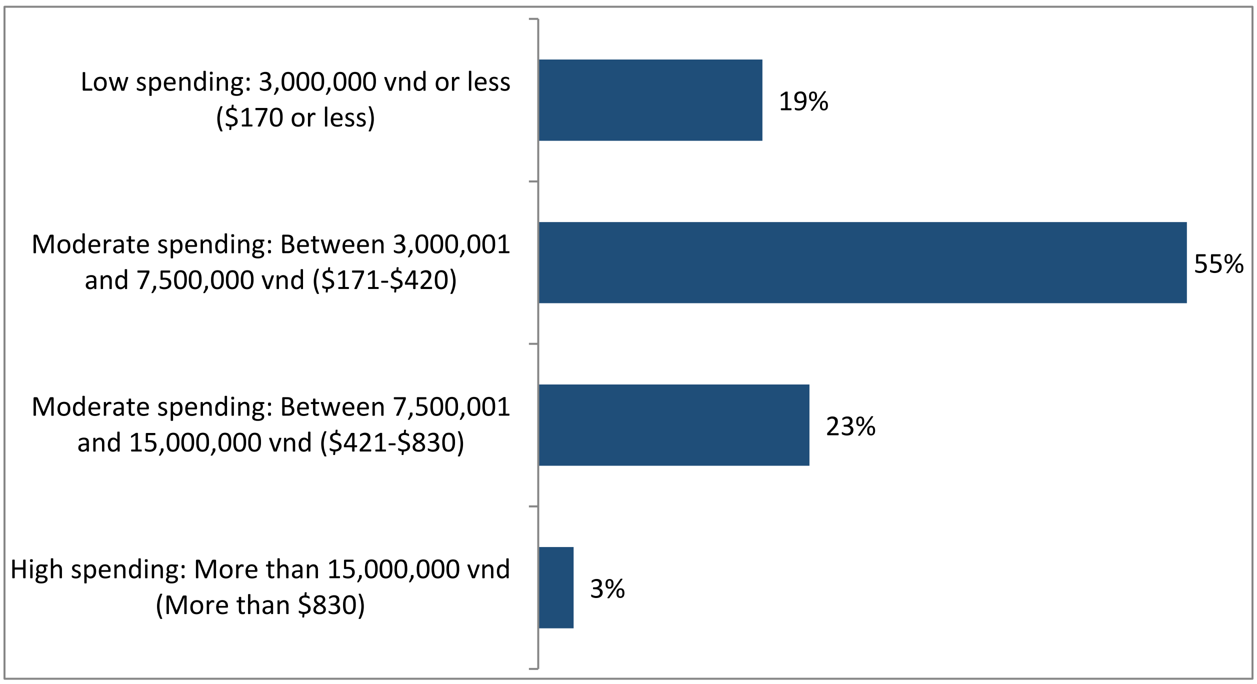
Average monthly food spending

Results show that the majority of Vietnamese consumers (55%) spent between 3,000,001 and 7,500,000 vnd per month on food purchases ($164 to $410 cad), while around one in five spent less than 3,000,001 vnd (19%), and one in four spent more than 7,500,000 vnd (26%).

Note: For the sake of crosstabulations, spending categories have been grouped in three subgroups. The categories "low", "moderate", and "high" food and seafood monthly spending refer to the following spending brackets:

- low spending: 3,000,000 vnd (roughly $164) or less
- moderate spending: between 3,000,001 and 15,000,000 vnd ($164 to $830)
- high spending: over 15,000,000 vnd (over $830)

Figure 2: Average monthly food spending



Q1: Approximately how much does your household spend on food purchases per month? Base: All respondents (n=2,301) *For analysis purposes, the original answer options were grouped into four brackets.

While men, consumers from Can Tho, higher-earning consumers, and those who have experience abroad were more likely to spend more on their food shopping, women, younger consumers and Khanh Hoa residents spent less. Detailed breakdown is as follows:

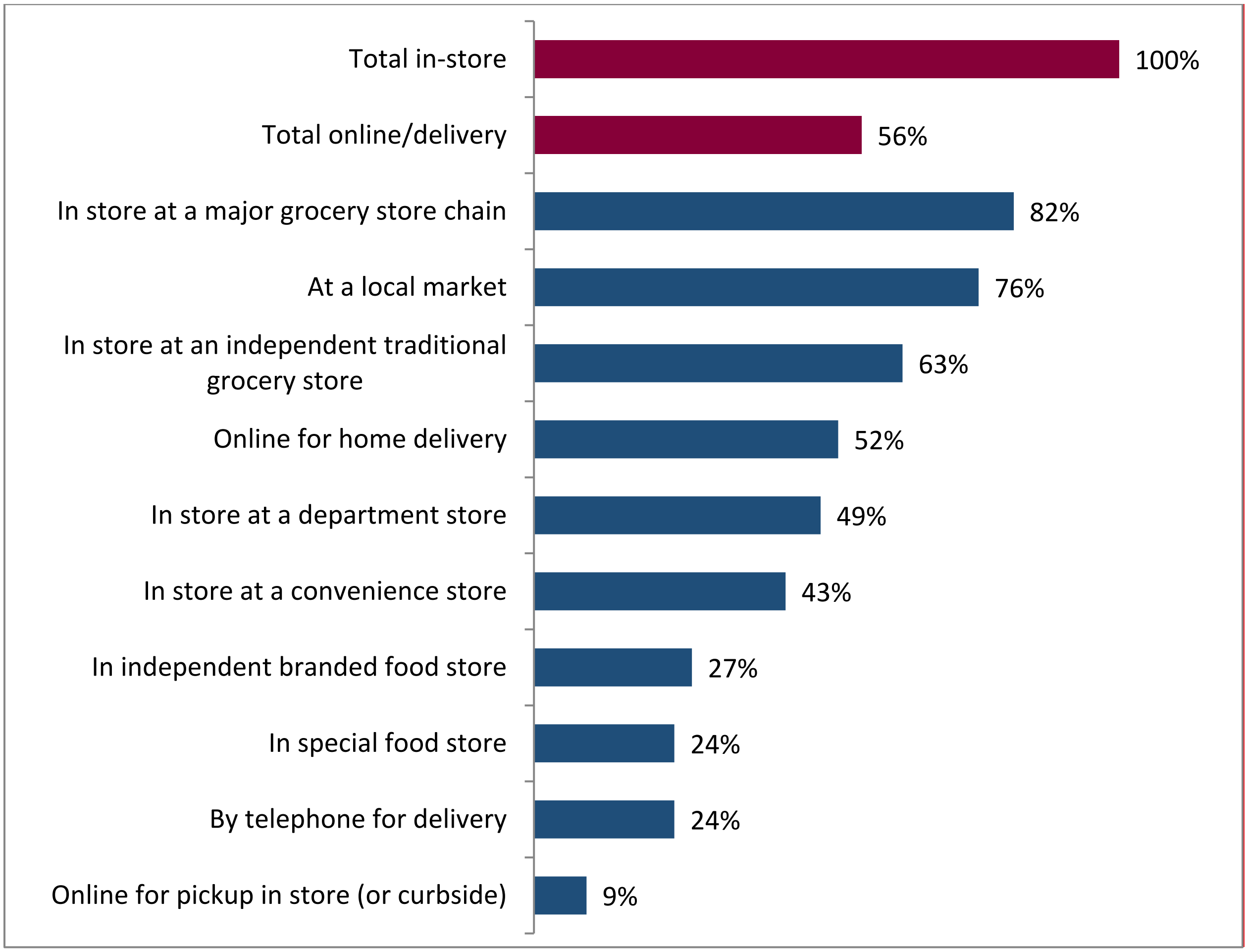
- Men were significantly more likely to spend more on groceries than women, with a third (32%) of them spending between 7,500,001 and 15,000,000 vnd ($420 to $830) per month (versus 19% among women), and around 5% of them spending more than 15,000,000 vnd – roughly $830 (versus 2% among women).
- Consumers from Can Tho were more likely to have high spending - more than 15,000,000 vnd ($320) (13%).

- Vietnamese consumers with higher incomes (above 40,000,000 vnd – roughly $2,220) were also more likely to spend more than 15,000,000 vnd (21%).
- Those who have experience abroad (who either travelled for work, education, or vacation) were significantly more likely to spend more than those who don't: a third of them (32%) spent between 7,500,000 vnd and vnd 15,000,000 vnd ($421-830), while over one in four (28%) of Vietnamese consumers with no experience abroad spent less than 3,000,001 vnd (roughly $170).
- Those who bought Canadian food or seafood products were more likely to spend more on groceries per month, with one third (33%) spending 7,500,001 vnd to 15,000,000 vnd ($420-$830), and 5% spending more than 15,000,000 vnd ($830).
- On the other hand, some subgroups were especially likely to have low monthly food spending: 20 to 34-year-old consumers (24%), women (21%), and residents of Khanh Hoa (31%) were more likely to spend less than 3,000,000 vnd (roughly $164) per month on food.

Types of establishments for buying food products

Major grocery store chains were the most popular type of establishment to buy groceries from (82%), followed by local markets (76%) and traditional grocery stores (63%). Shopping online for home delivery (52%) and at department stores (49%) are also popular. Ordering online for curbside pickup is the least popular option (9%).

Figure 3: Types of establishments for buying food products



Q2: In the past three months have you purchased food at the following: (click as many as apply) Base: All respondents (n=2,301)
*Because respondents were able to give more than one answer, total mentions may exceed 100%.

While in-store shopping remains the most popular way to shop, online/delivery shopping is especially popular among men (65% versus 52% among women), those who have children living in their household (59% versus 46%), those who went to college/university (65%) or beyond (70%), those who live in Ho Chi Minh (62%) or Da Nang (72%), and other urban areas (61%), those with moderate to high incomes (61% and 71% respectively), those who have travelled abroad (70%) compared to those who don't (39%), and among those who purchased Canadian food products in the past year (71%).

Other significant differences include:

- Men were more likely to shop in-store at a major grocery chain (86% versus 81% among women), at a department store (56% versus 45%), and a convenience store (56% versus 37%)
- Respondents with children in their household were more likely to shop at a major grocery store chain (84% versus 74% among those who do not), at a department store (51% versus 40%), in an

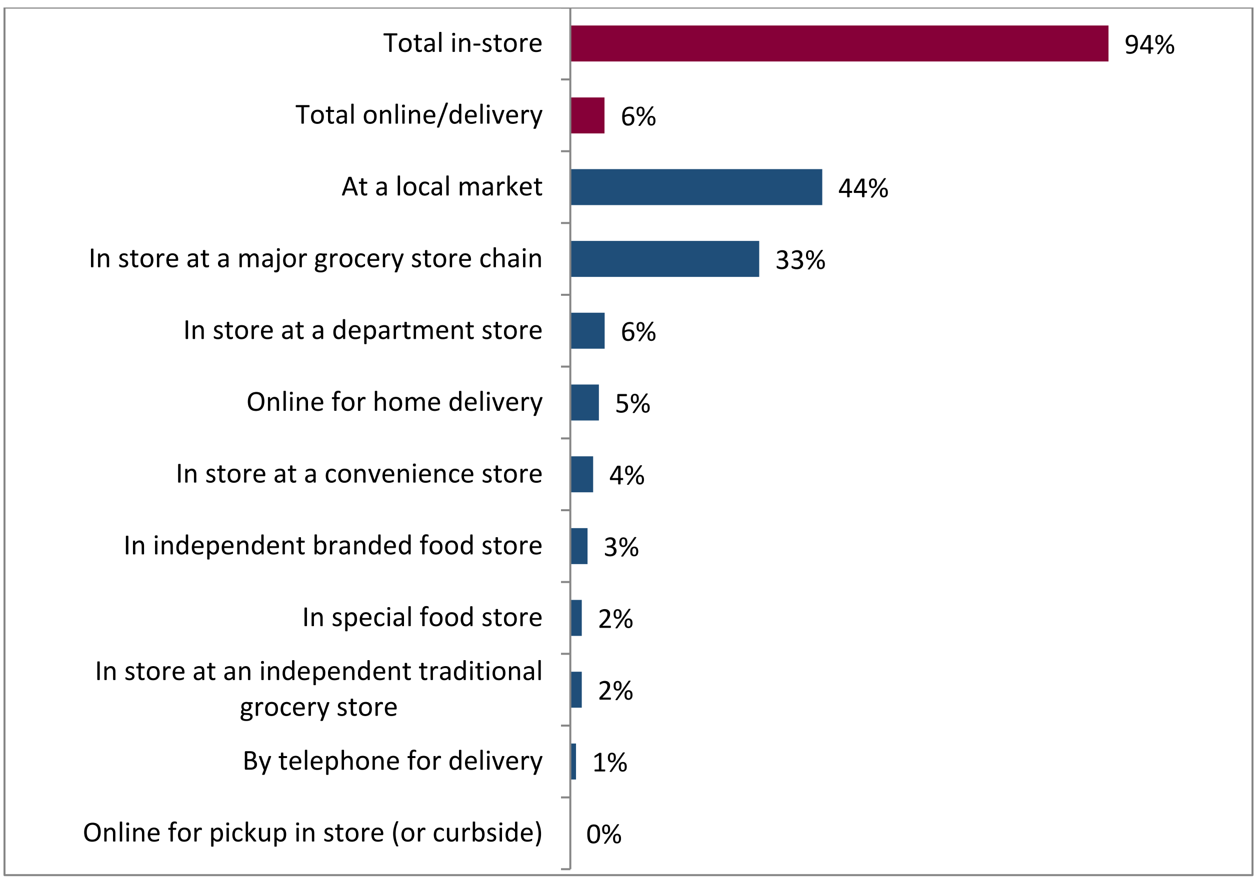
independent branded food store (29% versus 18%), in special food store (26% versus 14%), and at a convenience store (45% versus 38%)

- Those who did not have experience abroad were significantly more likely to shop at a local market (79% versus 76% among those who do) and less likely to shop at other types of stores aside from independent traditional grocery stores
- Those who bought Canadian food products in the past were more likely to shop at major grocery store chains (92% versus 80% among those who did not), at a department store (66% versus 44%), in an independent branded food store (47% versus 21%), in a special food store (48% versus 17%), and in a convenience store (48% versus 42%)

Preferred establishment for buying food

Local markets (44%) and major grocery store chains (33%) are the preferred establishments for buying food for respondents. Department stores come third with less than one in ten (7%) respondents who reported buying the majority of their food from them. Online/delivery shopping methods are not popular among Vietnamese consumers, as only 6% of them prefer shopping either online for home delivery (5%) or by telephone for delivery (1%).

Figure 4: Preferred establishment for buying food



Q2A: And out of the same list, where do you buy the majority of your food? Base: All respondents (n=2,301)

For analysis purposes, the answers “Online for home delivery”, “By telephone for delivery” and “Online for pickup in store (or curbside) were grouped in “Total online/delivery”. All other answers are grouped under “Total in-store”.

While the majority of respondents preferred shopping in-store, some subgroups were more likely to purchase the majority of their food online or for delivery (cf. Total online/delivery). Those that were more likely to purchase the majority of the food online or for delivery were:

- men (8% compared to 4% among women)
- consumers with children in their household (7% versus 1%)
- residents of Hai Phong and Da Nang (9% and 21% respectively)
- those with high household incomes (11%)
- those who have travelled abroad (8%)

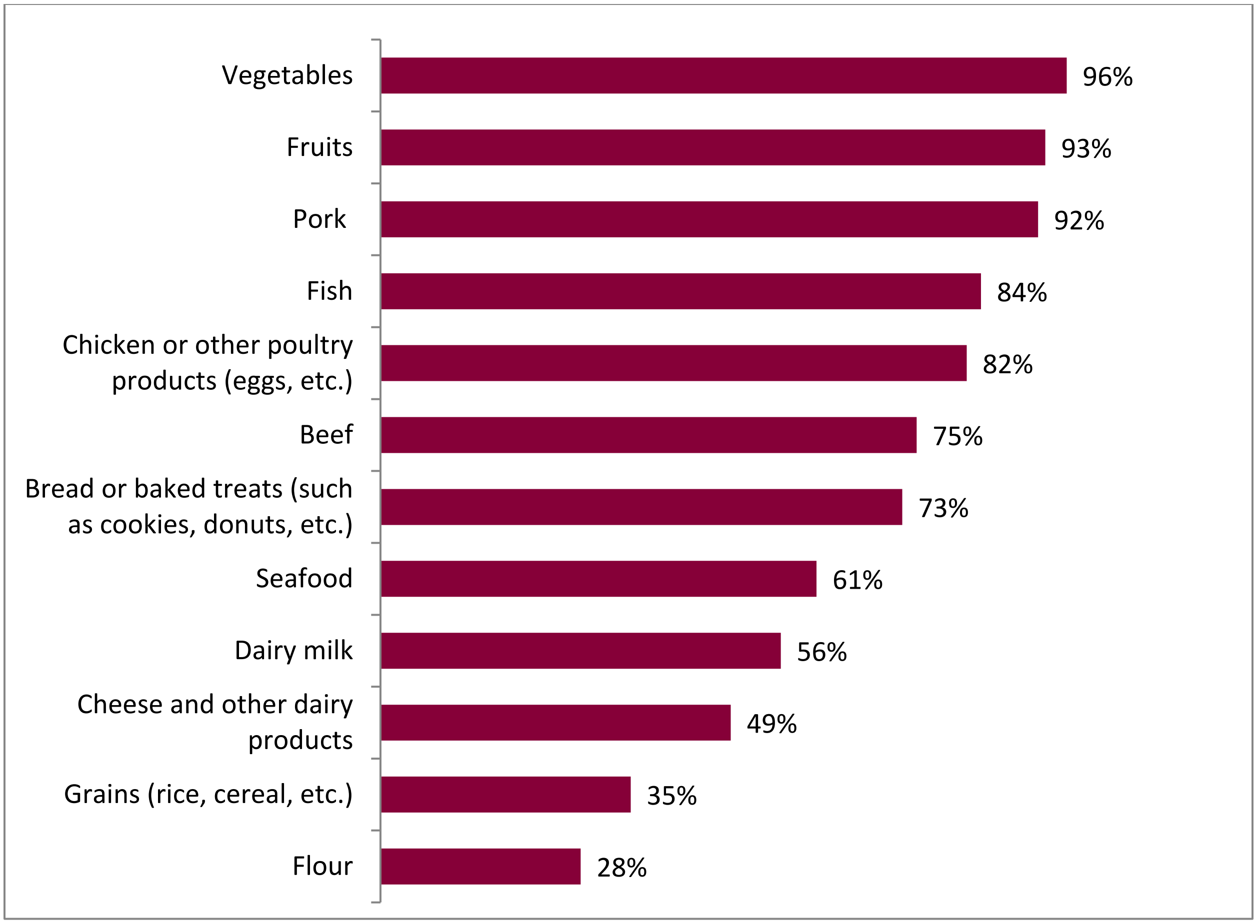
Other significant differences include:

- Men tend to prefer major grocery store chains (42% versus 29% among women), while women prefer local markets (50% versus 31%),
- Consumers without children are more likely to prefer local markets than those with children (54% versus 42%),
- Residents from Ho Chi Minh are more likely to prefer major grocery store chains (41%), while residents of Hai Phong and Khanh Hoa prefer local markets (53% and 69% respectively),
- Consumers who on average spend more per month on food are overrepresented among those who prefer major grocery store chains (46% among those who have high monthly food spending versus 29% among those with low monthly food spending),
- Consumers who have travelled abroad (45%) and those who purchased Canadian products (39%) were more likely to prefer major grocery store chains.

Frequency of shopping for specific food items

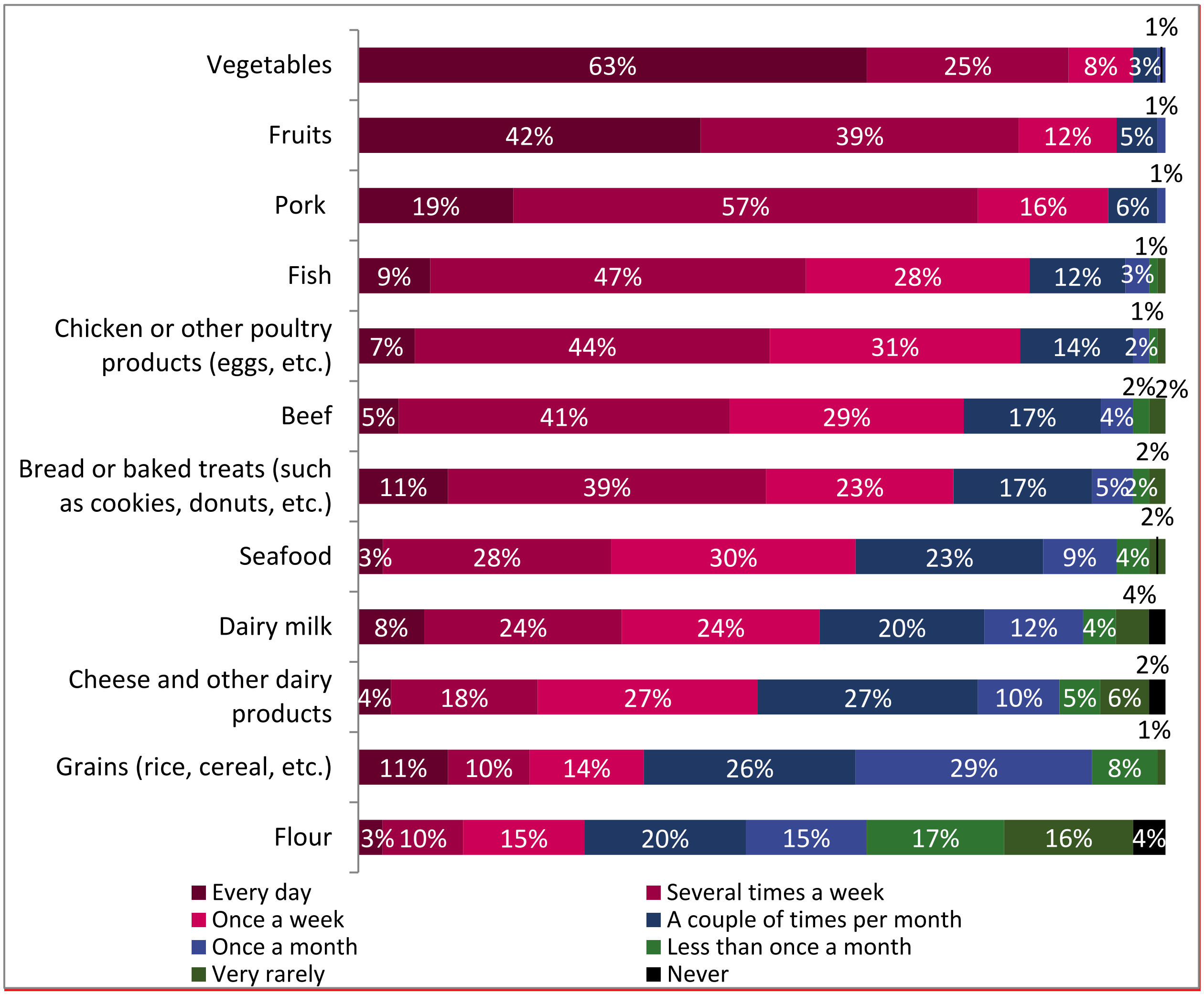
Vegetables, fruits, and pork came at the top of the list of the most frequently purchased food items, as over nine people out of ten buy them at least once a week. Fish, chicken, and beef follow as the second most frequently bought food items (84%, 82% and 75% respectively). Dairy products (milk: 57% and cheese and other dairy: 49%), grains (35%) and flour (27%) are the items bought the least frequently. Fish is bought at least weekly by over eight Vietnamese consumers out of ten (84%), while seafood is somewhat less popular as it is bought at least weekly by six out of ten consumers (61%).

Figure 5: Most purchased food items on a weekly basis



Q4: How often do you buy the following foods for your household… Base: All respondents (n=2,301)

Figure 6: Frequency of shopping for specific food items



Q4: How often do you buy the following foods for your household... Base: All respondents (n=2,301)

For analysis purposes, a total of consumers who purchased food on a weekly basis has been computed by summing the first three answer options: every day, several times a week, and once a week.

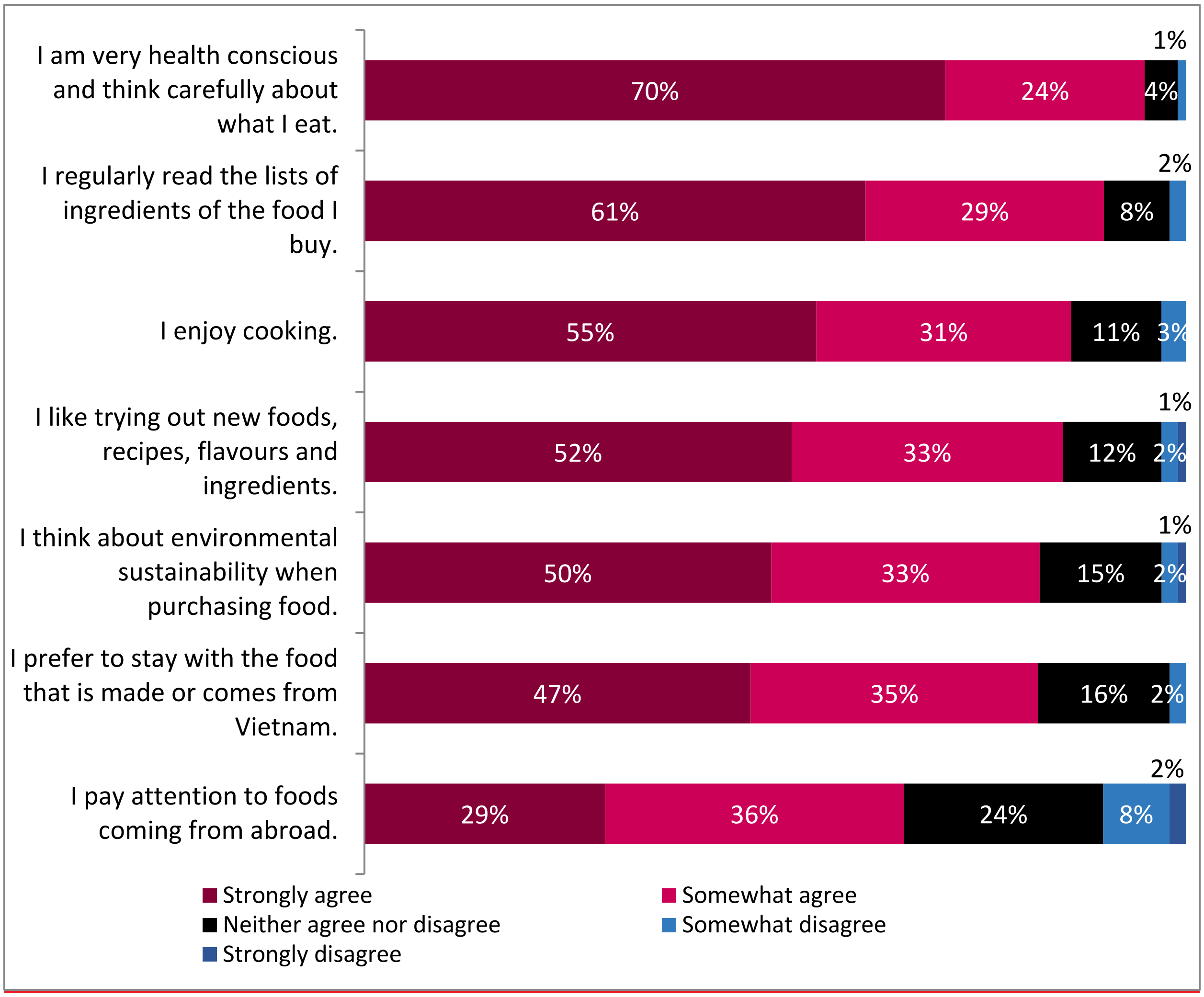
Overall, men, along with respondents with children living in their household, and respondents with higher incomes, were more likely to purchase their food items weekly at least, compared to the rest. For instance, beef is bought on a weekly basis by three in four respondents with children (78% versus 62%). Hanoi, Ho Chi Minh, and Da Nang residents are also among consumers who purchase their food on a weekly basis: for example, around six in ten residents of Hanoi (58%) Ho Chi Minh (62%) and Da Nang (65%) residents of purchase dairy milk on a weekly basis at least.

Vietnamese consumers who have travelled abroad also show some significant differences in their weekly food purchasing habits. They are more likely to purchase chicken (86% versus 75%), beef (81% versus 67%), and seafood (65% versus 56%) on a weekly basis.

Attitudes toward food buying and cooking

The vast majority of Vietnamese consumers consider themselves health-conscious and think carefully about what they eat (94%) and regularly read the lists of ingredients (90%). However, fewer Vietnamese consumers pay attention to food coming from abroad (65%). Around half (52%) of respondents say they strongly agree with trying out new foods, flavours, recipes and ingredients, and around a third (33%) somewhat agree. Although they love trying out new food, around eight in ten (82%) people still prefer to stay with Vietnamese foods.

Figure 7: Attitudes towards food buying and cooking



Q5: Please indicate how you agree or disagree with the following statements… Base: All respondents (n=2,301)

Overall, respondents who travelled abroad were more likely to agree with five out of the seven statements: they are health conscious (96% versus 92%), they regularly read ingredient lists (93% versus 86%), they like trying out new foods (91% versus 77%), they care about environmental sustainability (84% versus 80%), and they pay attention to foods coming from abroad (72% versus 56%). They are also less likely to prefer sticking to food that is made or comes from Vietnam (79% versus 86%).

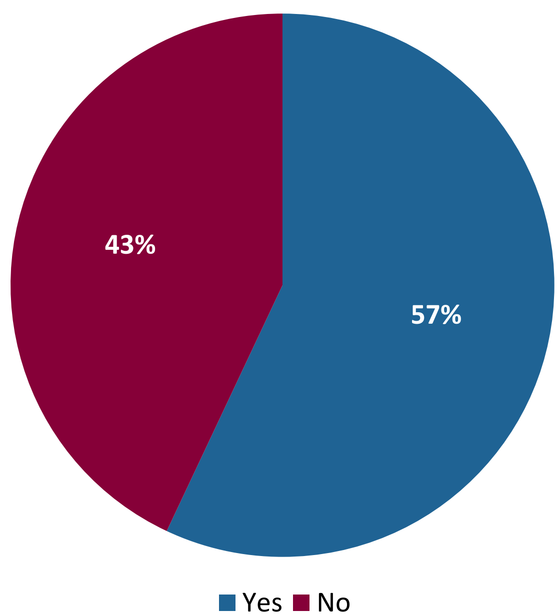
Women were also more likely to agree with the majority of the statements compared to men: they enjoy cooking more (88% versus 82%), they pay attention to the foods coming from abroad (67% versus 61%), they think more about environmental sustainability (84% versus 79%), and they are also more likely to prefer sticking to Vietnamese foods (85% versus 75%).

International experiences

Travelling abroad

Around six out of ten (%) Vietnamese consumers have travelled abroad, whether for work, education or vacation. Inversely, around four in ten have never been abroad (43%).

Figure 8: Travelled abroad



Q12: Have you or someone in your household ever been abroad (for work, education or vacation)? Base: All respondents (n=2,301).

The following subgroups were more likely to have travelled abroad:

- respondents over 45 years old (63%)
- men (74% versus 48% among women)
- respondents with children (59% versus 48%)
- respondents who went to college/university (68%) and beyond (91%), compared to 18% among those who went to middle school or less
- residents of Ho Chi Minh (67%) and Da Nang (74%), compared to Hai Phong (42%), Can Tho (37%) and Khanh Hoa (38%)

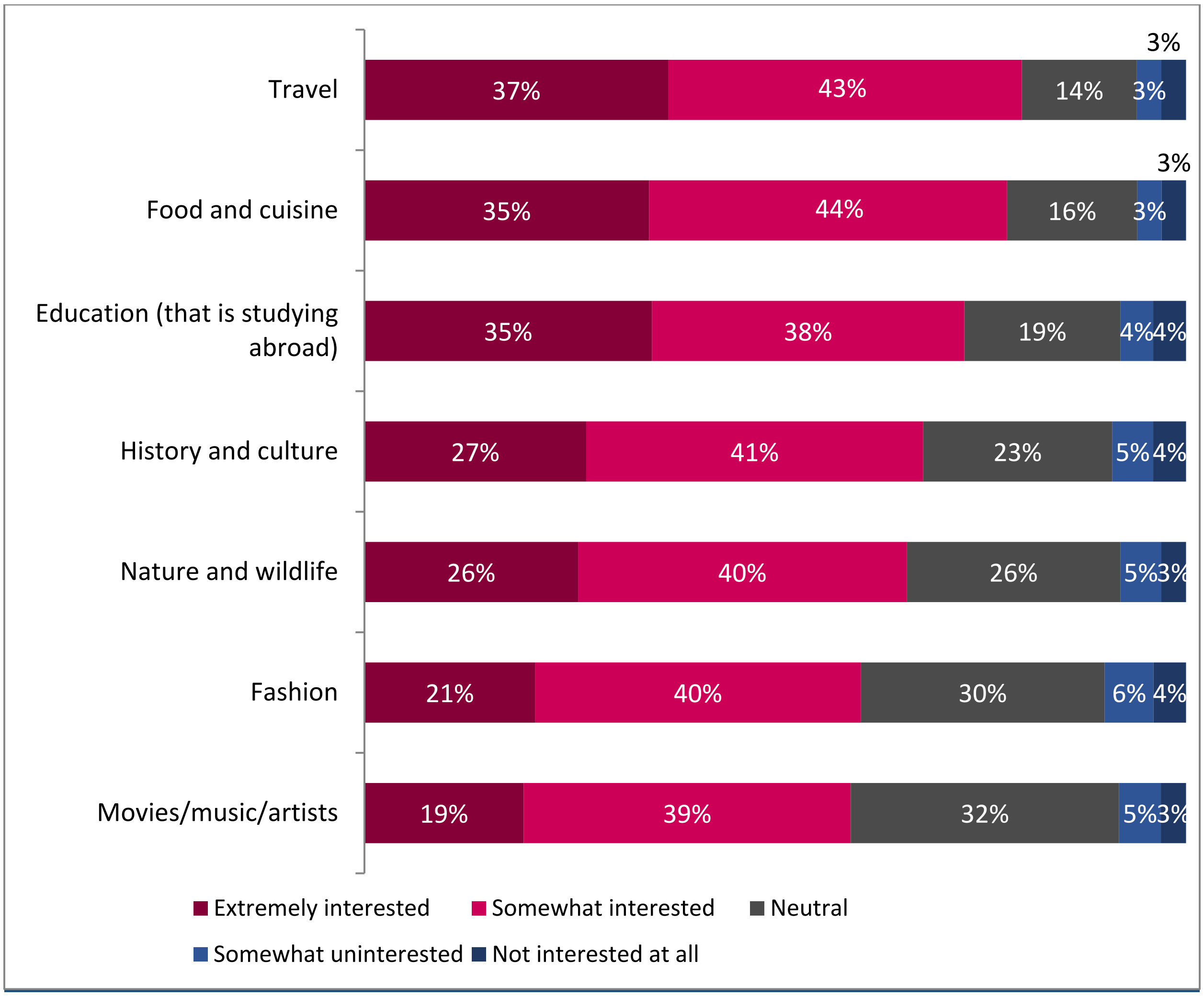
- respondents with moderate to high household incomes (59% and 79% respectively versus 34% among low incomes)
- respondents who are interested in international food and cuisine (63% versus 21%)

Interest in different aspects of other countries

Travel, food and cuisine are the most interesting aspects of other countries for Vietnamese consumers, as eight out of ten said they are interested in them (80% and 78% respectively). Around three out of four are interested in education (73%). Vietnamese consumers are the least interested in fashion (60%), and movies/music/artists (59%).

Around a third of respondents said they are extremely interested in food and cuisine (35%) and around two out of five are somewhat interested (44%). This interest in food and cuisine indicates an opportunity to market Canadian food products to the Vietnamese market.

Figure 9: Interest in different aspects of other countries



Q13: To what extent are you interested or not in foreign countries when it comes to … Base: All respondents (n=2,301)

Some subgroups stood out for showing more interest in aspects of other countries compared to the average. Men, respondents with children, Hanoi and Ho Chi Minh residents, along with respondents who have experience abroad and those who purchased Canadian products in the past year were especially likely to say they are interested in the various aspects.

The following subgroups were especially like to be interested in foreign countries when it comes to food and cuisine:

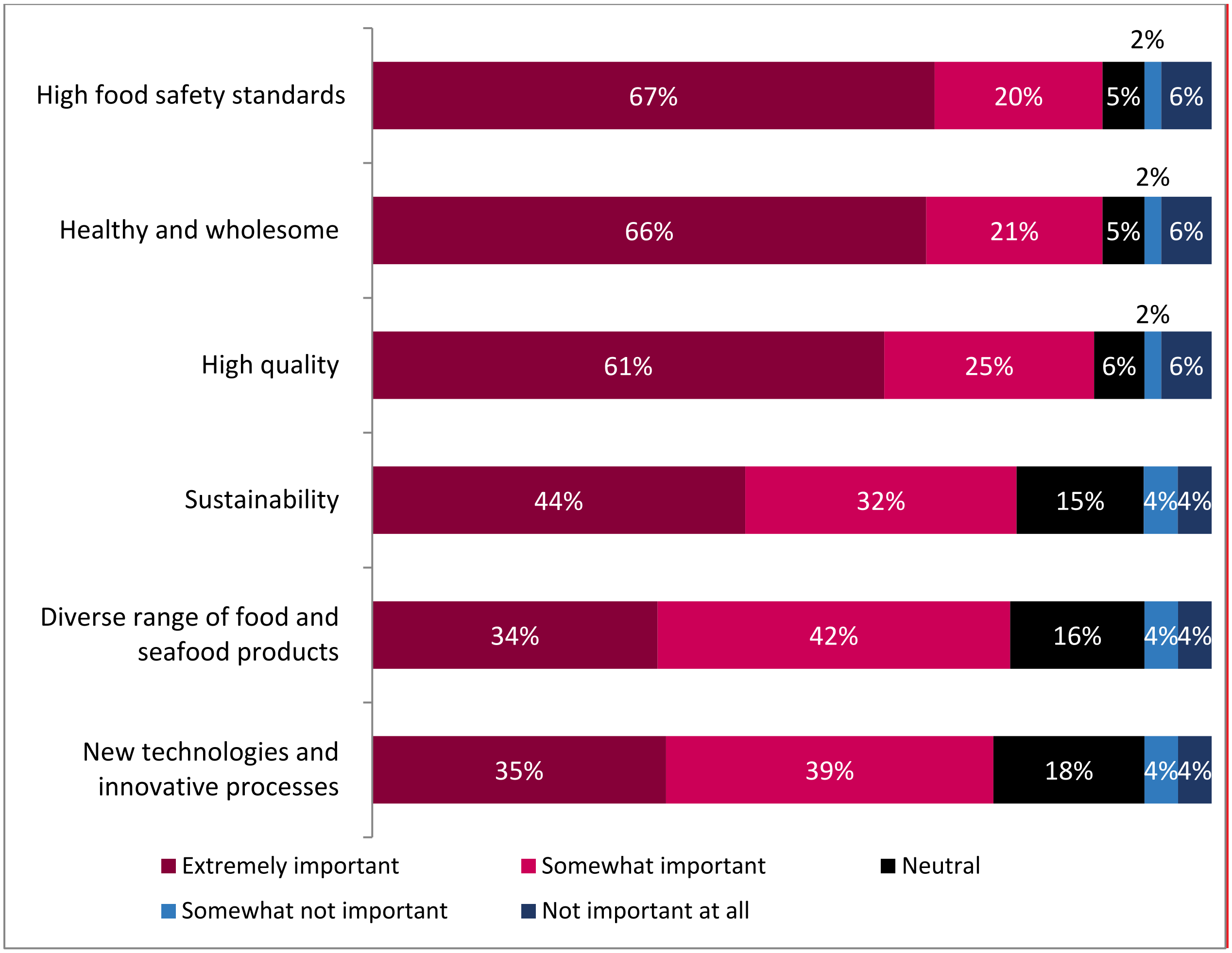
- men (83% versus 76% among women)
- people with children (81% versus 70%)
- Hanoi (91%) and Ho Chi Minh residents (83%), compared to Hai Phong (61%), Khanh Hoa (67%) and Can Tho (67% residents)
- respondents who have experience abroad (87% versus 67%)
- respondents who purchased Canadian food products (93% versus 74%)

International food purchasing

Importance of various criteria when buying international food products

All criteria were considered important to some degree by Vietnamese consumers. Nine in ten Vietnamese consumers consider high food safety standards (87%), the healthy and wholesome aspect (87%), and high quality (86%) to be important criteria when buying international food products. Sustainability, diversity, and innovation were followed closely as they were rated as important by over three out of four respondents (77%, 76%, and 75% respectively). A diverse range of products as well as new technologies and innovative processes were considered extremely important by around one third of respondents (34% and 35% respectively).

Figure 10: Importance of various criteria when buying international food products



Q11: Please indicate how important each of these following criteria are when buying food or seafood products from foreign countries. Base: Respondents who remember purchasing international food products and knew at which frequency (n=1,769)

Overall, some subgroups stand out as they are significantly more likely to agree with most of the statements: namely, women and respondents who have previously travelled abroad along with those who are interested in international food and cuisine. The detailed breakdown is as follows:

The following subgroups were more likely to think that high food safety standards are important:

- women (90% versus 84% among men)
- respondents interested in international food and cuisine (90% versus 55%)
- respondents who purchase Canadian food products (94% versus 85%)

The following subgroups were especially likely to think that the healthy and wholesome aspect is important:

- women (89% versus 84% among 20 to 34-year-olds)

- respondents who are interested in international food and cuisine (89% versus 52%)
- respondents who purchased Canadian food products (94% versus 84%)

The following subgroups were especially likely to think that high quality is important:

- women (88% versus 82% among men)
- respondents who are interested in international food and cuisine (89% versus 55%)
- respondents who purchased Canadian food products (95% versus 83%)

The following subgroups were especially likely to think that sustainability is important:

- women (81% versus 69% among men)
- respondents with high food spending (89% versus 76%)
- respondents who are interested in international food and cuisine (80% versus 42%)
- respondents who purchased Canadian food products (87% versus 73%)

The following subgroups were especially likely to think that a diverse range of products is important:

- women (81% versus 67% among men)
- respondents with children (78% versus 69%)
- Hanoi residents (80% versus 59% among Khanh Hoa residents)
- respondents who are interested in international food and cuisine (81% versus 26%)
- respondents who purchased Canadian food products (93% versus 70%)

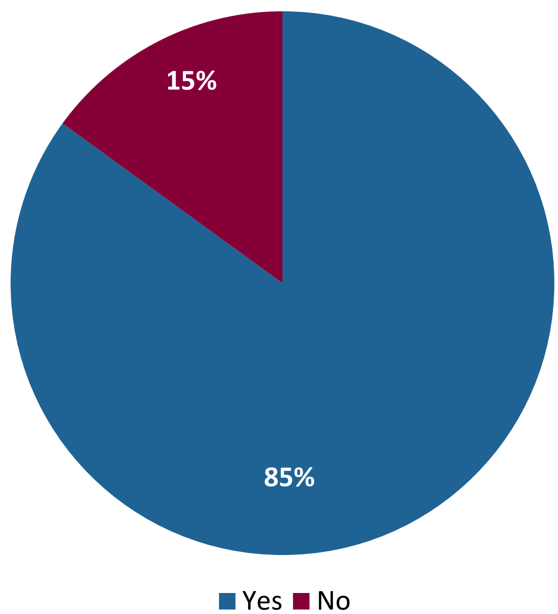
The following subgroups were especially likely to think that new technologies and innovative processes are important:

- older respondents (81% versus 69% among 20 to 34-year-olds)
- women (77% versus 67% among men)
- respondents with children (75% versus 66% among those without)
- residents of Hanoi (78% versus 58% among residents of Khanh Hoa)
- respondents who spend high monthly amounts on food and seafood products (90% versus 69%)
- respondents interested in international food and cuisine (78% versus 29%)
- respondents who purchased Canadian products (89% versus 68%)

International food purchase

A vast majority of Vietnamese consumers have purchased international food products in the past year (85%). The proportion was higher among those who had been abroad (97%), men (94%), residents of Hanoi (93%), Da Nang (96%) and Ho Chi Minh (91%), and high income earning individuals (93%).

Figure 11: Proportion of Vietnamese consumers who purchased international food or seafood products in the past year



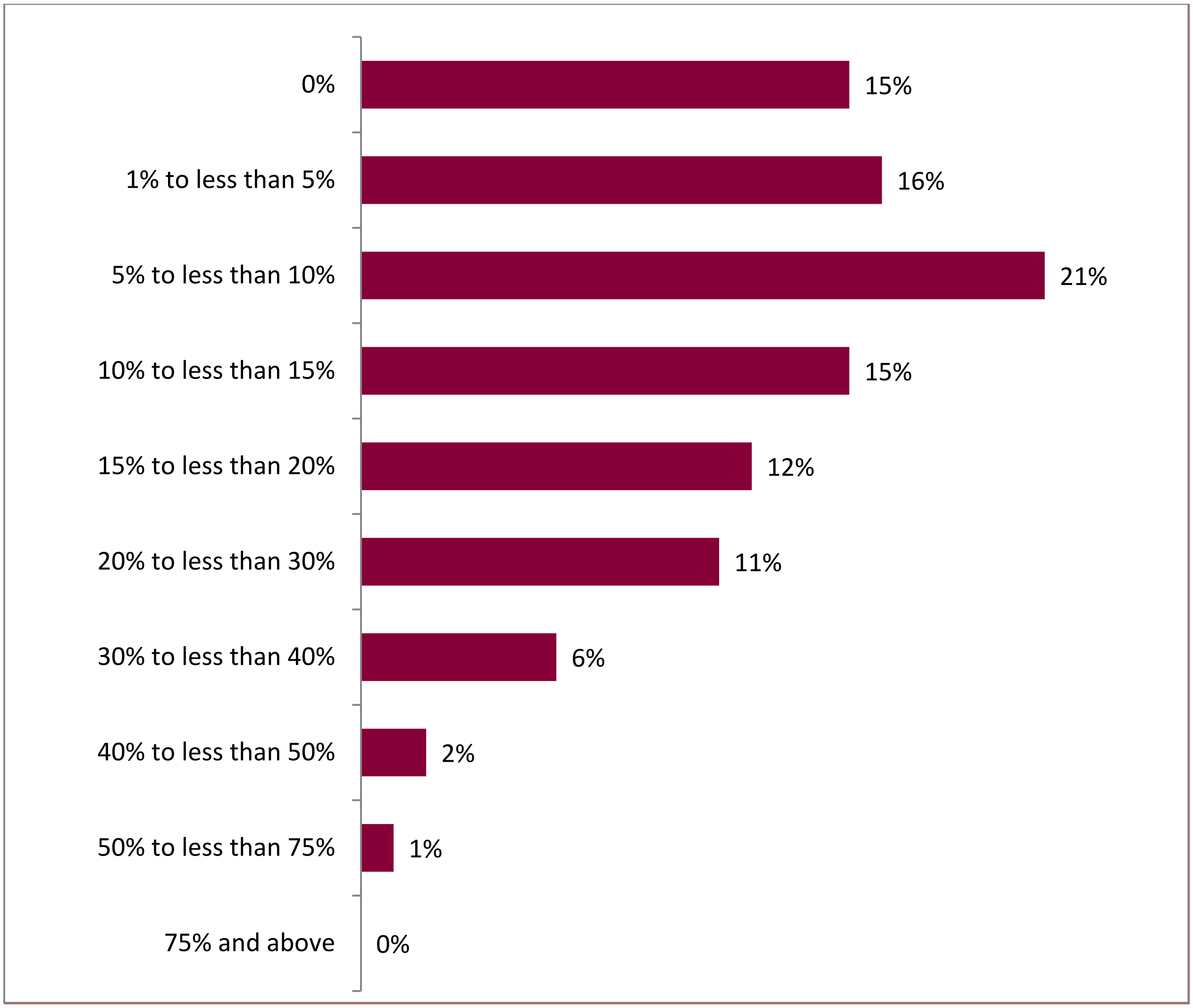
Q6: Out of the total amount your household spends on food in a year, about how much of it, in percentage, is spent on food and seafood imported from other countries?
Base: All respondents (n=2,301)

*Note: This variable has been calculated by grouping the original answer options into two categories: Yes (if the proportion of food budget spent on international food products is strictly higher than 0%), and No (if the proportion is 0%).

Proportion of food budget spent on international food products

A majority of Vietnamese consumers (85%) purchased international food products. Around a third (37%) of Vietnamese consumers spend between 1% and 10% of their yearly household food budget on international food products. Around half (47%) spend between 10% and 75%, with less than one in ten spending more than 30% (9%).

Figure 12: Proportion of food budget spent on international food and seafood products



Q6: Out of the total amount your household spends on food in a year, about how much of it, in percentage, is spent on food and seafood imported from other countries? Base: All respondents (n=2,301)

Hai Phong and Can Tho residents (38% and 37% respectively), respondents with low household incomes (31%), respondents who did not have any experience abroad (29% versus 3%), along with older respondents (45 years and older: 21% versus 12% among 20 to 34), and women (19% versus 6% among men) were especially likely to not spend any of their budgets on imported foods.

Respondents who are 20 to 34 years old (68% versus 60% among those aged 45 and older), respondents with children (65% versus 60%), residents of Ho Chi Minh (69%), those with moderate incomes (69%), respondents who are interested in international food and cuisine (67% versus 33%), as well as respondents who bought Canadian food products (69% versus 63%), were more likely to spend between 1 and 20% of their yearly food budget on foreign products.

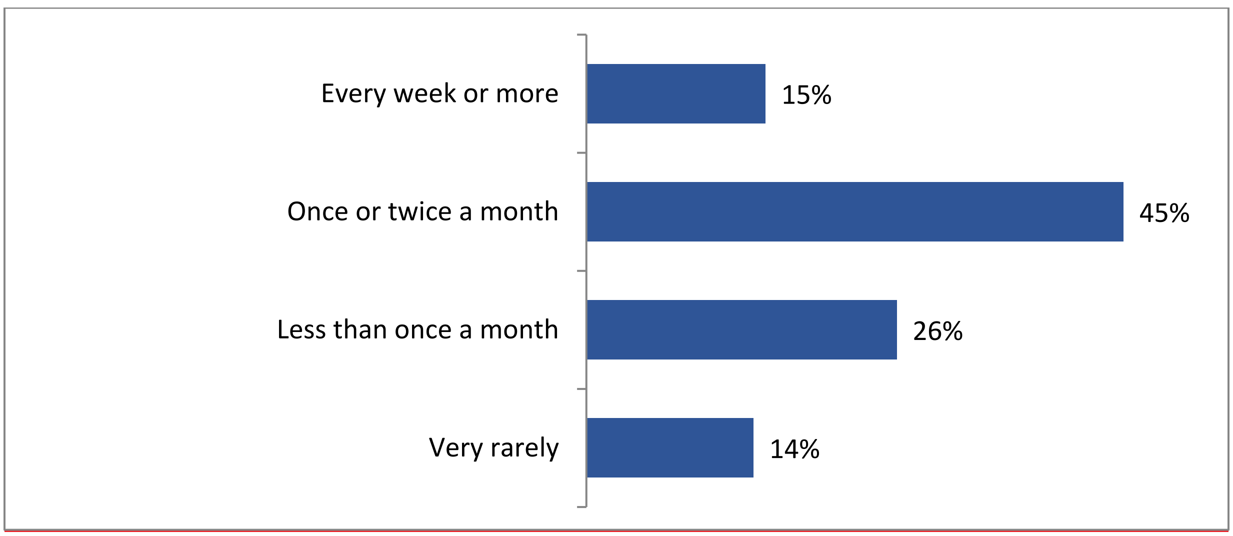
Subgroups who spend 20 to 40% of their food budget on international food products include men (24% versus 14% among women), respondents with children (19% versus 14%), Ha Noi and Da Nang residents (23% and 28%), respondents with high household incomes (30%), respondents with experience abroad (25% versus 7%), respondents interested in international food (21% versus 2%), and respondents who purchased Canadian products (26% versus 15%).

Finally, residents of Da Nang (9%), respondents who have high monthly food spending (12%), and respondents with experience abroad (5% versus 1%) were more likely to spend between 40% and 75% of their food budget on international foods.

Frequency of purchasing international food products

Six in ten (60%) Vietnamese consumers who purchased international food products say they purchased them at least once a month, with around 45% having bought them once or twice a month. One in four consumers bought international food products less than once a month (26%), and around one in ten only bought international food products very rarely (14%).

Figure 13: Frequency of purchasing international food products



Q8: Thinking of the last 1 year, how often have you purchased food or seafood from other countries? Base: Respondents who remember buying food from other countries (n=1,775).

Overall, residents of Ho Chi Minh and Da Nang, respondents who have previously travelled abroad, along with those with higher incomes were more likely to purchase international food items on a more frequent basis (weekly or monthly). On the other hand, residents of Khanh Hoa, respondents with no experience abroad, and lower-income respondents were more likely to buy international foods less than once a month or rarely. Details about significant differences and frequency of purchase of international foods are presented below.

The following subgroups were more likely to have bought food or seafood from other countries every week or more in the past year:

- consumers aged 35 to 44 years old (18%)
- residents of Ho Chi Minh and Da Nang (17% and 22%)
- respondents with high incomes (27% on average)
- respondents with high monthly food spending (49%)
- respondents who shop in major grocery store chains (24%) and online for home delivery (28%)
- respondents who have experience abroad (20%)
- respondents who purchased Canadian food products (25%)

The following subgroups were especially likely to have bought food or seafood from other countries once or twice a month:

- men (52%)
- respondents with children (46%)
- Ho Chi Minh (48%), Hai Phong (57%), and Da Nang (58%) residents
- respondents with moderate monthly food spending (47%)
- respondents with experience abroad (53%)

The following subgroups were especially likely to have bought food or seafood from other countries less than once a month:

- women (27%)
- residents of Khanh Hoa (34%)
- respondents with no experience abroad (35%)

The following subgroups were especially likely to have bought food or seafood from other countries very rarely:

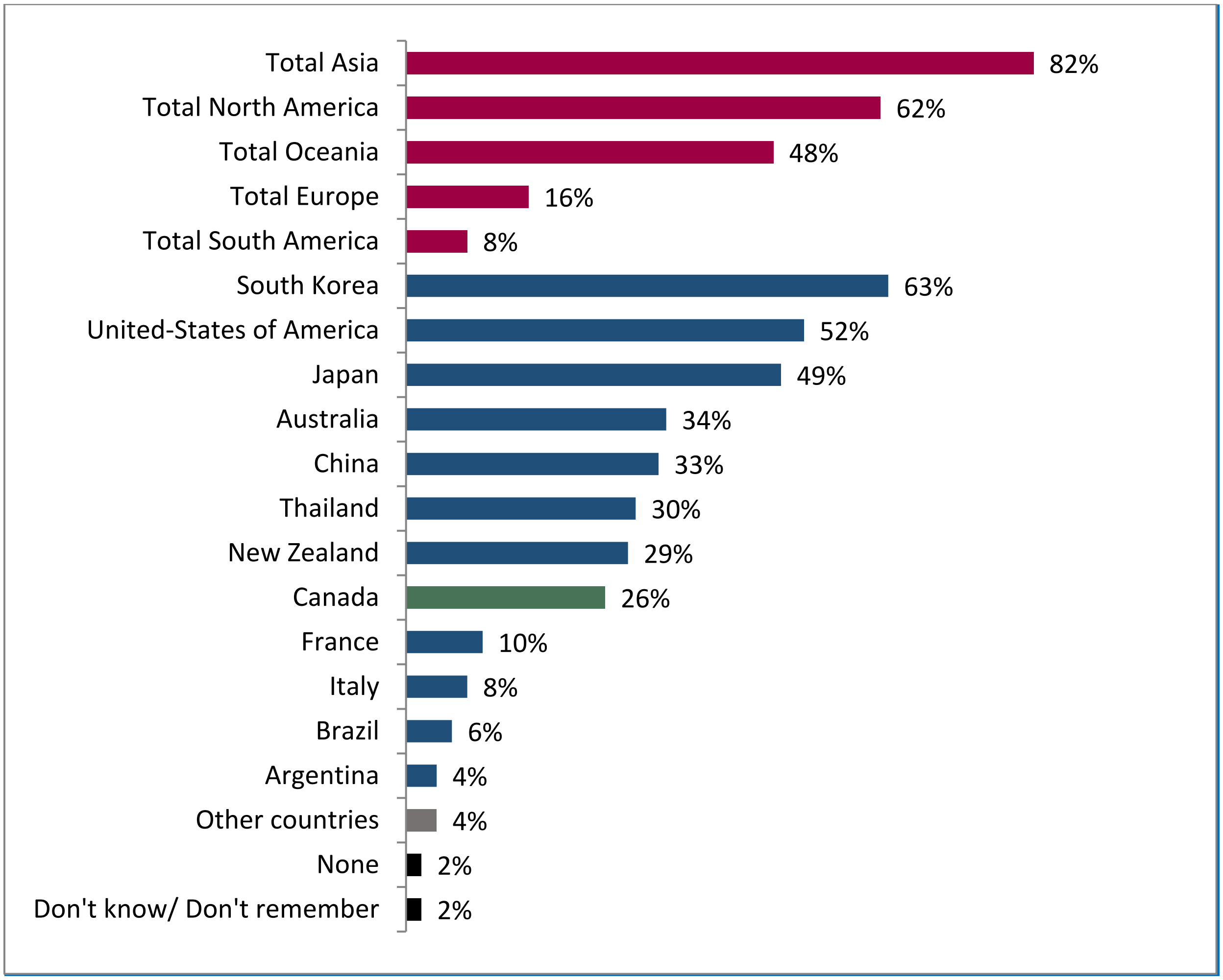
- women (15%)
- respondents without children (24%)
- residents of Khanh Hoa (31%)
- respondents with low incomes (31%)
- respondents with low monthly food spending (28%)
- respondents with no experience abroad (28%)

Origin of purchased international food products

For analysis purposes, countries were grouped by continent.

The vast majority of Vietnamese consumers have bought food products from other Asian countries within the last year (81%), around six in ten (62%) have bought food from North America, including one in four (26%) from Canada. Oceania (Australia and New Zealand) came out third with just under half (48%) of Vietnamese consumers saying they purchased food from there. Europe and South America came in last (16% and 8% respectively). While American products were twice as popular as Canadian ones (52% versus 26%), Canada performed better than European countries.

Figure 14: Origin of purchased international food products



Q7: Thinking of the last 1 year, did you purchase food or seafood coming from … Base: Respondents who spend more than 0% of their food budget on foreign products (n=1,853)
*Because respondents were able to give more than one answer, total mentions may exceed 100%.

Some subgroups were more likely to have purchased food from Canada in the past year than others. Consumers aged 35 to 44 (34% compared to 22% among those aged 20 to 34 years old), women (33% compared to 15% among men), residents of Hanoi (39% versus 11% and 14% among residents of Khanh

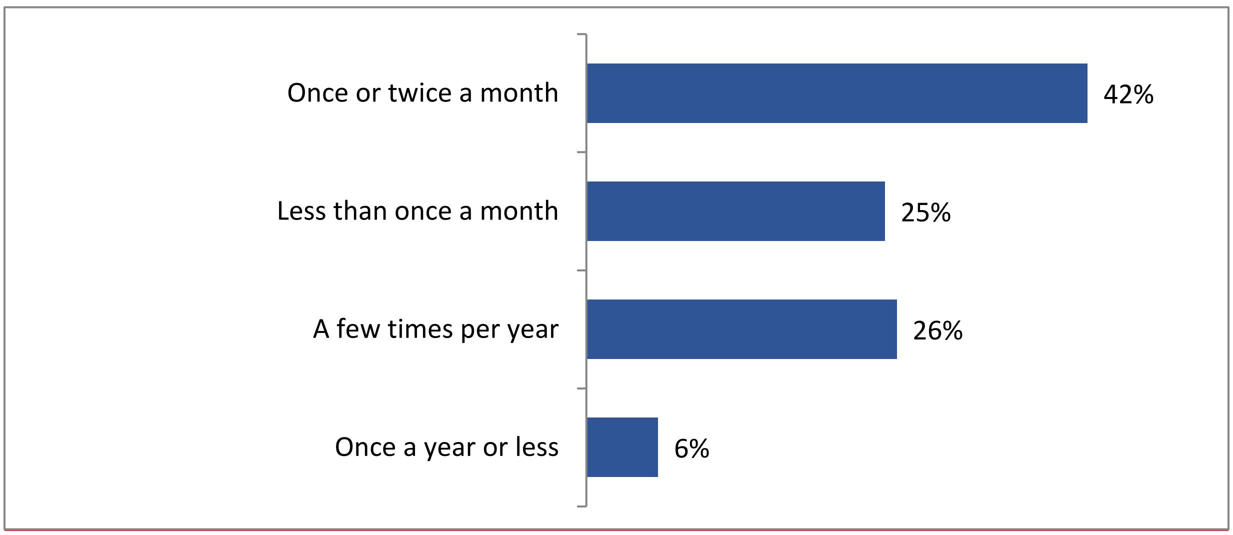
Hoa and Canh Tho), those who had moderate to high food spending (28% and 39% respectively), and those who were interested in international food and cuisine (29% versus 6%), were all more likely to have purchased food from Canada in the past year than others.

On the other hand, those who were 20 to 34 years old (22%), men (15%), residents of Khanh Hoa and Can Tho (11% and 14% respectively), respondents with low incomes (17%), and respondents with low monthly food spending (15%) were more likely to have not purchased food or seafood coming from Canada in the past year.

Frequency of purchasing Canadian food products

Four in ten (42%) respondents who purchased Canadian products in the past year did so once or twice a month. Around one in four consumers bought Canadian products less than once a month (25%), and the same proportion a few times per year (26%). Around 6% of Vietnamese consumers who have bought food from Canada have done so once a year or less (6%).

Figure 15: Frequency of purchasing Canadian food products



Q9: In the last 1 year, approximately how often do you recall buying food and seafood made in Canada?
Base: Respondents who have purchased food from Canada in the past year (n=666)

Subgroups with higher incomes, older respondents, and those with experience abroad were more likely to buy Canadian food products on a more frequent basis. On the other hand, respondents with lower incomes, younger respondents (20 to 34), and those who have never been abroad bought Canadian products less frequently (a few times per year or less). The detailed breakdown is presented below.

The following subgroups were more likely to have bought food or seafood from Canada once or twice a month in the past year:

- consumers aged 35 to 44 years old (52% versus 34% among 20 to 34)
- residents of Ho Chi Minh (48% compared to 31% among Hanoi residents)

- respondents with higher incomes (57%)
- respondents who have travelled abroad (52% versus 28%)

The following subgroups were especially likely to have bought food or seafood from Canada less than once a month in the past year:

- respondents over 45 years old (36% versus 23% and 21% among 20 to 34 and 35 to 44 respectively)
- residents of Hanoi (29%)

The following subgroups were especially likely to have bought food or seafood from Canada a few times per year in the past year:

- 20 to 34-year-olds (33% compared to 21% among 35 to 44)
- residents of Hanoi (34% versus 22% among those who live in Ho Chi Minh)
- residents who have not travelled abroad (38% versus 19%)

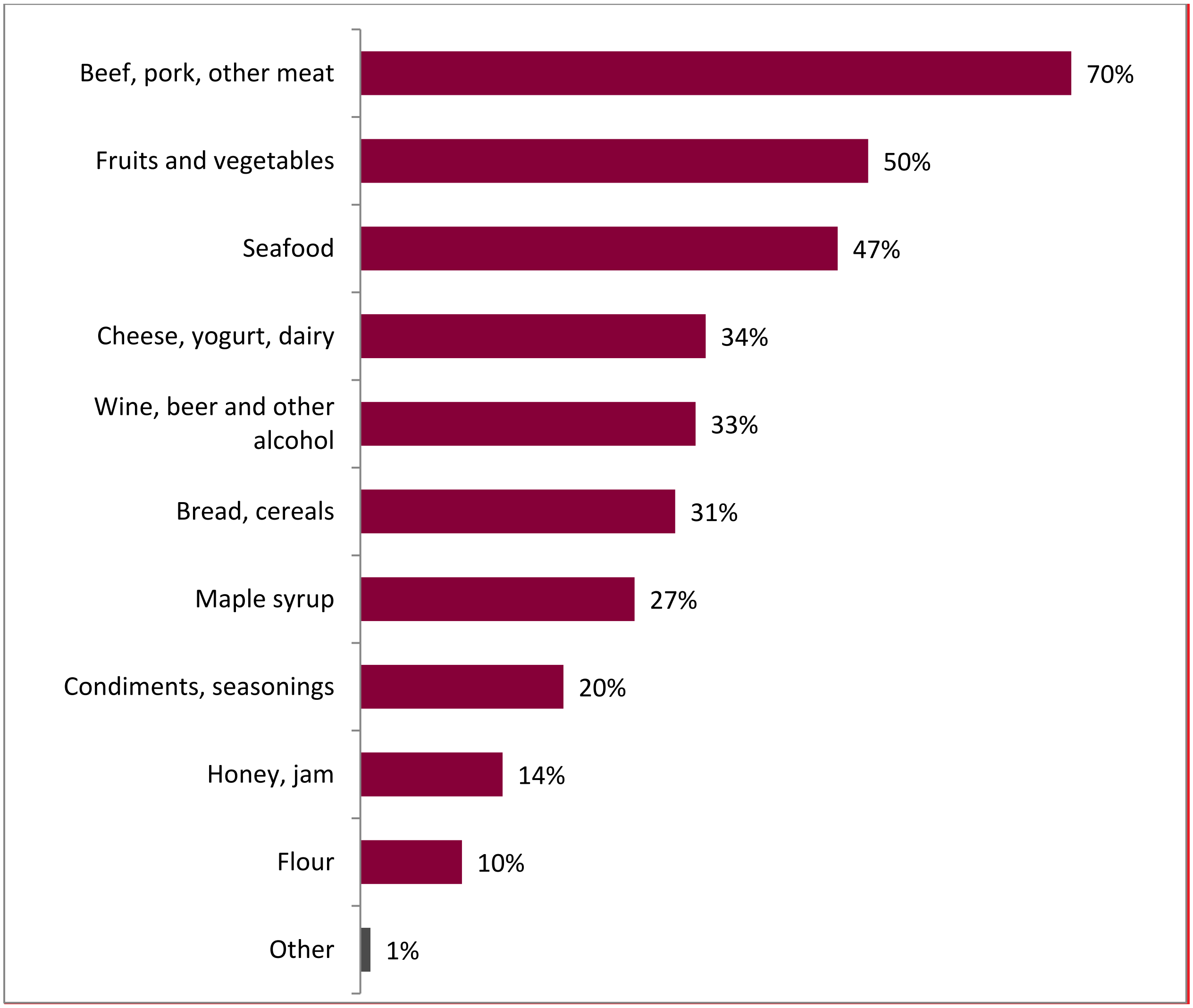
The following subgroups were more likely to purchase food and seafood made in Canada once a year or less:

- 20 to 34-year-olds (10% versus 1% among those aged 45 and older)
- respondents with lower incomes (13%)
- residents who have not travelled abroad (9% versus 4%)

Types of purchased Canadian food products

Beef, pork and other meat were the most purchased Canadian products (70%), followed by fruits and vegetables (50%) and seafood (47%). Dairy, alcohol, bread and cereal were bought by around a third of respondents (34%, 33% and 31% respectively). Honey, jam and flour were the least popular Canadian products (14% and 10% respectively). Canadian maple syrup, while world-famous, was not at the top of the list, as it was bought by around one in five consumers (27%).

Figure 16: Types of purchased Canadian food products



Q10: From the following list, please indicate which Canadian products you have purchased in Vietnam in the last 1 year. (Check all that apply) Base: Respondents who purchased food from Canada in the past year (n=666)
*Because respondents were able to give more than one answer, total mentions may exceed 100%.

Significant differences in Canadian food products purchasing behaviour include:

- Older respondents are more likely to have bought bread and cereals (40%), and alcohol (42%)
- Respondents with children were more likely to have bought bread and cereals (32%)
- Hanoi residents were more likely to have bought beef, pork and other meat (78%)
- Ho Chi Minh residents were more likely to have bought bread and cereals (37%), honey and jam (19%), and flour (13%)
- Respondents with a low household income were more likely to have bought bread and cereals (43%)
- Respondents with high incomes were especially likely to have bought honey and jam (19%), fruits and vegetables (63%) and cheese, yogurt and dairy (44%)

- Respondents with experience abroad were more likely to have bought maple syrup (33%), bread and cereals (35), alcohol (40%), honey and jam (18%), flour (13%), condiments and seasoning (24%), and cheese yogurt and dairy (40%)

Profile of Canadian food product purchasers

Vietnamese consumers who purchased Canadian food products have some specific characteristics that set them apart from the rest of the sample:

- They are more likely to be women (80%)
- Over a third of them (39%) are aged 35 to 44 years old
- 41% of them live in Hanoi, and 46% in Ho Chi Minh
- 85% of them live in four or five people households
- Three in four of them (77%) make over 15,000,000 vnd monthly (roughly $825 cad)
- Over six in ten (65%) completed college or university

Table A.1: Profile of Canadian food product purchasers

Measure	Response	Total (n=2,301)	Canadian food purchasers (n=670)	Significant difference for Canadian food purchasers (Y)
Gender	Male	33%	20%	Y
	Female	67%	80%	Y
Age	20 to 24	13%	10%	Y
	25 to 29	17%	16%	
	30 to 34	17%	14%	Y
	35 to 39	16%	22%	Y
	40 to 44	14%	17%	Y
	45 to 49	13%	9%	Y
	50 to 54	11%	12%	
Region	Hanoi	25%	41%	Y
	HCM	45%	46%	
	Da Nang	5%	6%	
	Hai Phong	5%	2%	Y
	Khanh Hoa	3%	1%	Y
	Can Tho	3%	1%	Y
	Nam Dinh	1%	0%	Y
	Son La	1%	0%	
	Nghe An	2%	0%	Y
	Dak Lak	2%	0%	Y
	Vinh Long	1%	0%	Y
	Dong Nai	6%	1%	Y

Measure	Response	Total (n=2,301)	Canadian food purchasers (n=670)	Significant difference for Canadian food purchasers (Y)
Community size	Large city	84%	92%	Y
	Suburban of large city	11%	6%	Y
	In a small town	5%	2%	Y
	In a rural area	0%	0%	
Children at home	Yes	79%	83%	Y
	No	21%	17%	Y
Monthly household income	Low income - vnd 7,500,000 or less ($420 or less)	13%	5%	Y
	Low income - vnd 7,500,001 to 10,000,000 ($421 to $560)	12%	8%	Y
	Moderate income - vnd 10,000,001 to 15,000,000 ($561 to $830)	19%	10%	Y
	Moderate income - vnd 15,000,001 to 20,000,000 ($831 to $1,110)	18%	23%	Y
	Moderate income - vnd 20,000,001 to 30,000,000 ($1,111 to $1,670)	20%	32%	Y
	High income - Above vnd 30,000,000 (Above $1,670)	18%	22%	Y
Education level	Primary education complete	2%	1%	
	Middle school education complete	7%	1%	Y
	High school education complete	20%	23%	Y
	Vocational training	7%	5%	
	Some college or university, but not complete	4%	2%	Y
	College or University complete	55%	65%	Y
	Beyond college or university	4%	2%	Y
	Working full time	66%	69%	Y

Measure	Response	Total (n=2,301)	Canadian food purchasers (n=670)	Significant difference for Canadian food purchasers (Y)
Employment status	Working part time	9%	8%	
	Self-employed / freelance work	16%	17%	
	Student	3%	1%	Y
	Homemaker	5%	5%	
	Unemployed	1%	0%	
	Retired	0%	0%	
	I prefer not to answer	0%	0%	

- Vietnamese consumers who purchased Canadian food products spent more money on groceries monthly than average, as almost one in four (38% versus 24%) spent more than 7,500,000 vnd – roughly $420.
- They were also more likely to shop at major grocery store chains (92% versus 80% among those who did not), at department stores (66% versus 44%), in independent branded food stores (47% versus 21%), in special food stores (48% versus 17%), and in convenience stores (48% versus 42%).
- One in four (25%) purchased international food products at least every week, and they likely spent between 1% and 20% of their food budget on international food products (26% versus 15%).
- They showed a higher interest for foreign countries in general and gave more importance to all criteria regarding international food products.
- Respondents said Canadian food products have to be high quality, healthy and wholesome, sustainable, diverse, use innovative technologies and processes and most important meet high quality standards.

The competitive set

The next section presents how Canada performs compared to other anglophone countries in terms of interest, and top-of-mind mentions.

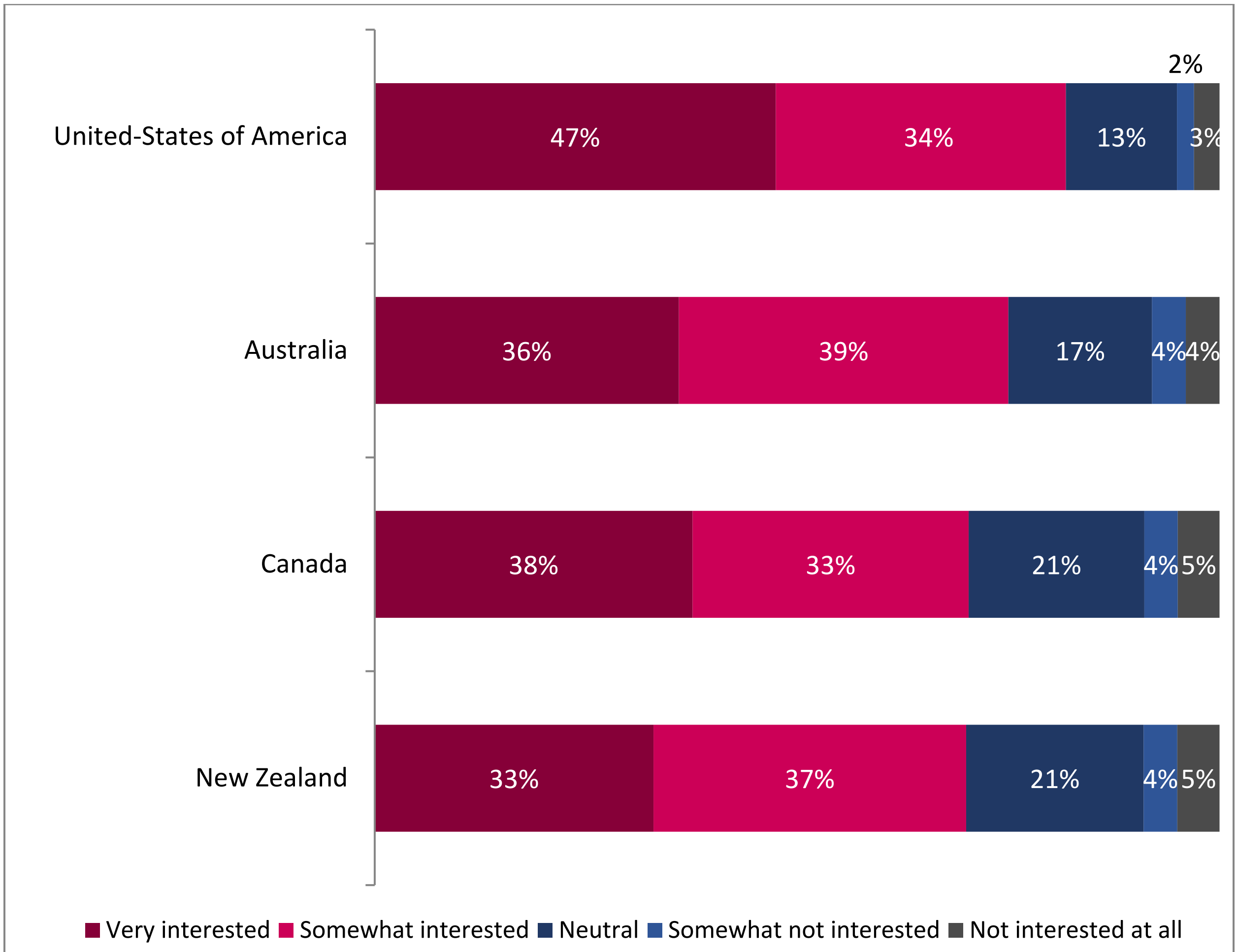
Interest in buying food from different countries

Vietnamese consumers were asked about their interest in purchasing food from Canada, the United States, Australia and New Zealand. Canada comes in third place with a total of 71% of respondents being very interested (38%) or somewhat interested (33%) in buying food from this country.

A vast majority (81%) of respondents have mentioned being very interested (47%) or somewhat interested (34%) in buying food from the United States. About three quarters (75%) have mentioned being very interested (36%) or somewhat interested (39%) in buying food from Australia. Lastly, seven out of ten (70%) respondents are very interested (33%) or somewhat interested (37%) in buying food from New Zealand.

While five in ten respondents (47%) state they are extremely interested in buying food from the United States, around four in ten (38%) say the same thing about Canada, which seems to confirm previous findings that Canadian products are not as well known compared to American ones. However, Canada still compares well to Australia and New Zealand as interest levels are similar across all three countries.

Figure 17: Interest in buying food from different countries



Q22: To what extent would you say you are interested in buying food products from the following countries in the future: Base: All respondents (n=2,301)

The following subgroups were more likely to be interested in buying food products from Canada:

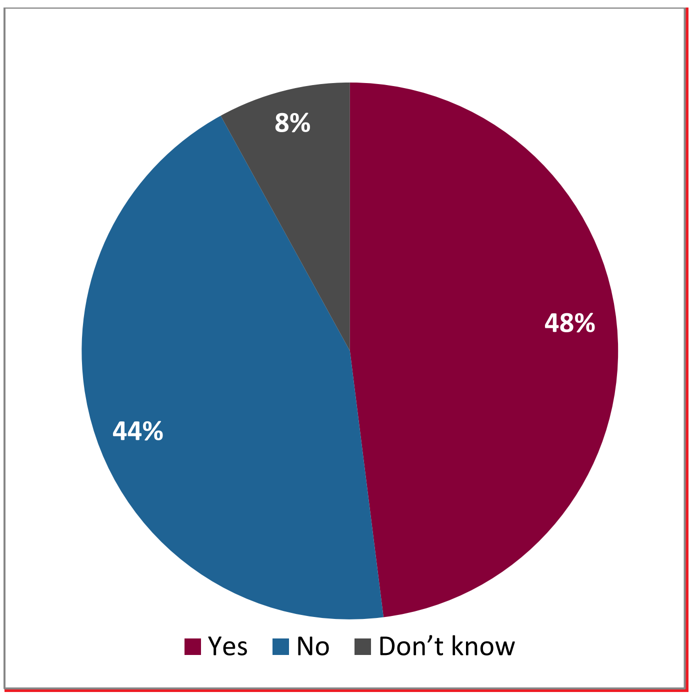
- those who have purchased Canadian food or seafood products in the past (93% versus 65%)
- those with moderate to high household incomes (76% and 82% versus 52%)

- those living in Hanoi (85%), Da Nang (85%), and Ho Chi Minh (77%) compared to Khanh Hoa (50%), Hai Phong (55%), and Can Tho (60%)
- those who have moderate to high monthly food spending (72% and 82% versus 64% among those with low spending)
- those who have an interest in international food and cuisine (82% versus 16%)
- men (79% versus 67% among women)
- those of 45 years of age or older (75% versus 68% among those age d20 to 34 years old)
- those living with children in the household (74% versus 57%)

Recall of "United Tastes of America" food products

About half (48%) recall seeing the tagline "United Tastes of America", while almost the same proportion (44%) do not recall seeing the tagline. The same trend as Canadian product recall can be noted for American products as well: the recall proportion is higher in urban areas and among higher household incomes.

Figure 18: Recall of "United Tastes of America" food products



Q21: Do you recall seeing an ad, poster or product with the tagline 'United Tastes of America'? Base: All respondents (n=2,301)

The following subgroups were more likely to remember seeing a "United Tastes of America" product or ad:

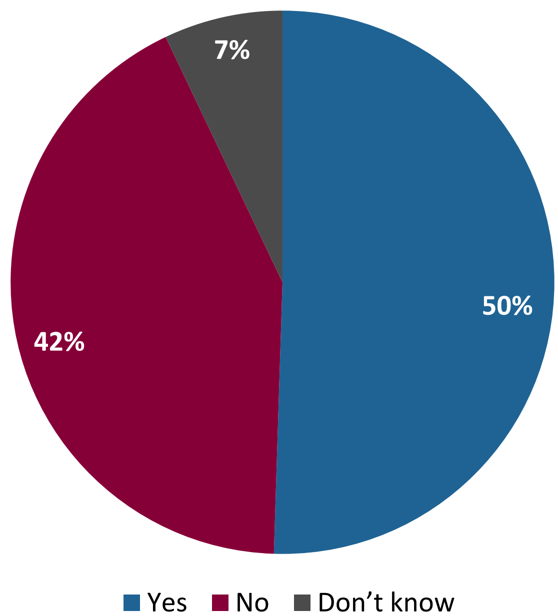
- those living in Da Nang (68%), Ho Chi Minh (56%) and Hanoi (51%) compared to residents of Hai Phong (34%), Khanh Hoa (33%), and Can Tho (35%)

- those with a moderate to high household income (51% and 59% respectively versus 32%)
- those with moderate to high monthly food spending (49% and 61% respectively compared to 40%)
- those interested in international food and cuisine (54% compared to 19%)
- those living with children in their household (52% versus 33%)

Recall of maple leaf on food products

Half of the respondents (50%) recall seeing food products with a red maple leaf in a store or online, while about four in ten (42%) do not recall seeing it. Less than one respondent out of ten (7%) do not know if they have seen the red maple leaf or not. The regions of Da Nang (71%), Ho Chi Minh (60%) and Hanoi (55%), had significantly higher recall rates than Khanh Hoa (38%), Can Tho (34%) and Hai Phong (31%), where on average one respondent out of three said they remembered seeing a product with a maple leaf. Other regions (aside from the six main regions), on the other hand, had the lowest recall rate (14%).

Figure 19: Recall of maple leaf on food products



Q19: Do you recall ever seeing food products with a red maple leaf in a store or online? Base: All respondents (n=2,301)

The following subgroups were more likely to have remembered seeing food products with a red maple leaf on them:

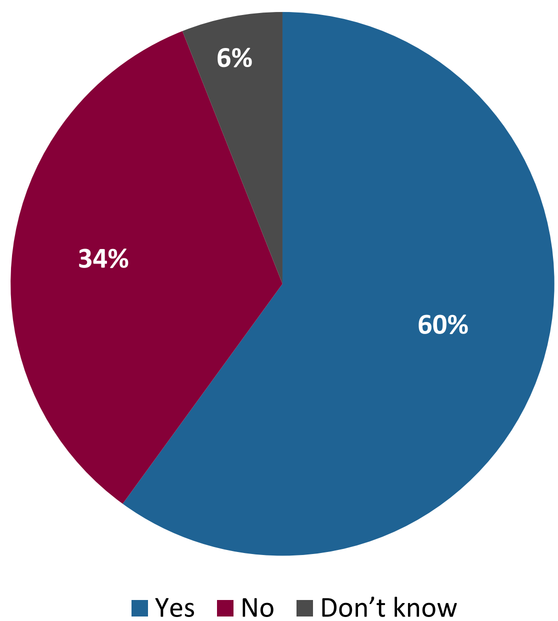
- those living in Da Nang (71%), Ho Chi Minh (60%) and Hanoi (55%), compared to Hai Phong (31%), Khanh Hoa (38%), and Can Tho (34%)
- those who have purchased Canadian food or seafood product (65% versus 46%)

- those with moderate to high incomes (54% and 62% respectively versus 34%)
- those who are interested in buying Canadian food products (60% versus 11%)
- men (61% versus 45%)
- those interested in international food and cuisine (58% versus 13%)
- those living with children in the household (54% versus 35%)

Recall of "Made in Canada" food products

Six in ten (60%) Vietnamese consumers recall seeing food products in store or online that specified it was from Canada, while a third (34%) did not recall seeing any product from Canada.

Figure 20: Recall of "Made in Canada" food products



Q20: Do you recall seeing food products in a store or online that specified that it was from Canada? Base: All respondents (n=2,301)

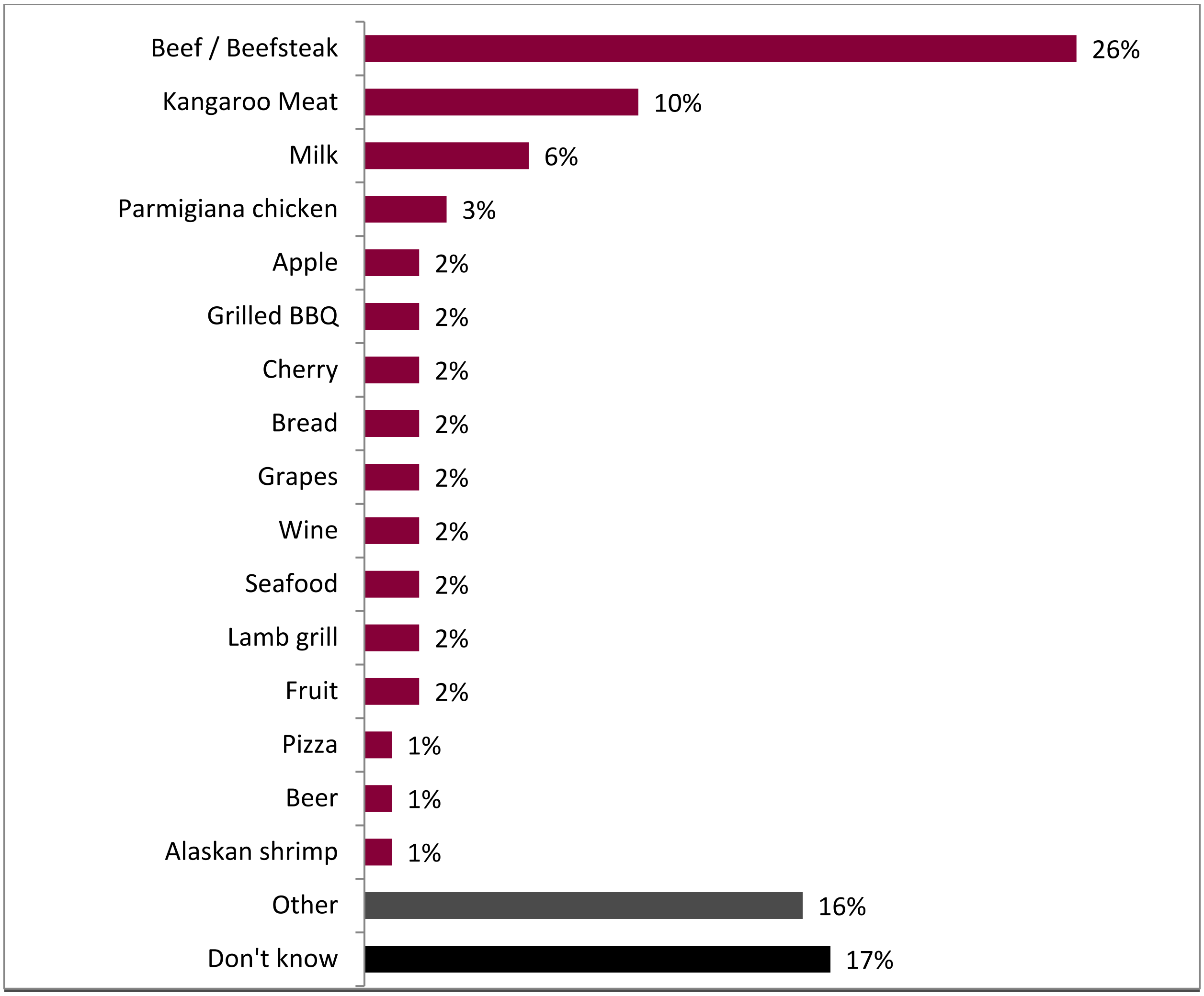
The following subgroups were more likely to recall seeing a food product specifying it was from Canada:

- those with average to high monthly food spending (64% and 70%)
- those living in Da Nang (76%), Hanoi (70%) and Ho Chi Minh (68%) compared to those living in Hai Phong (41%), Khanh Hoa (33%), and Can Tho (44%)
- those with moderate to high incomes (65% and 73% respectively versus 37%)
- those who are interested in buying Canadian food products (71% versus 16%)
- men (71% versus 54% among women)
- those living with children in the household (64% versus 42%)

Top of mind mentions – Australian food

When it comes to Australian food, a quarter of respondents (26%) have mentioned beef/beefsteak, followed by Kangaroo meat (10%) and milk (6%). On the other hand, about one in ten (17%) of respondents did not know what food comes to their mind when thinking about Australia.

Figure 21: Top of mind mentions – Australian food

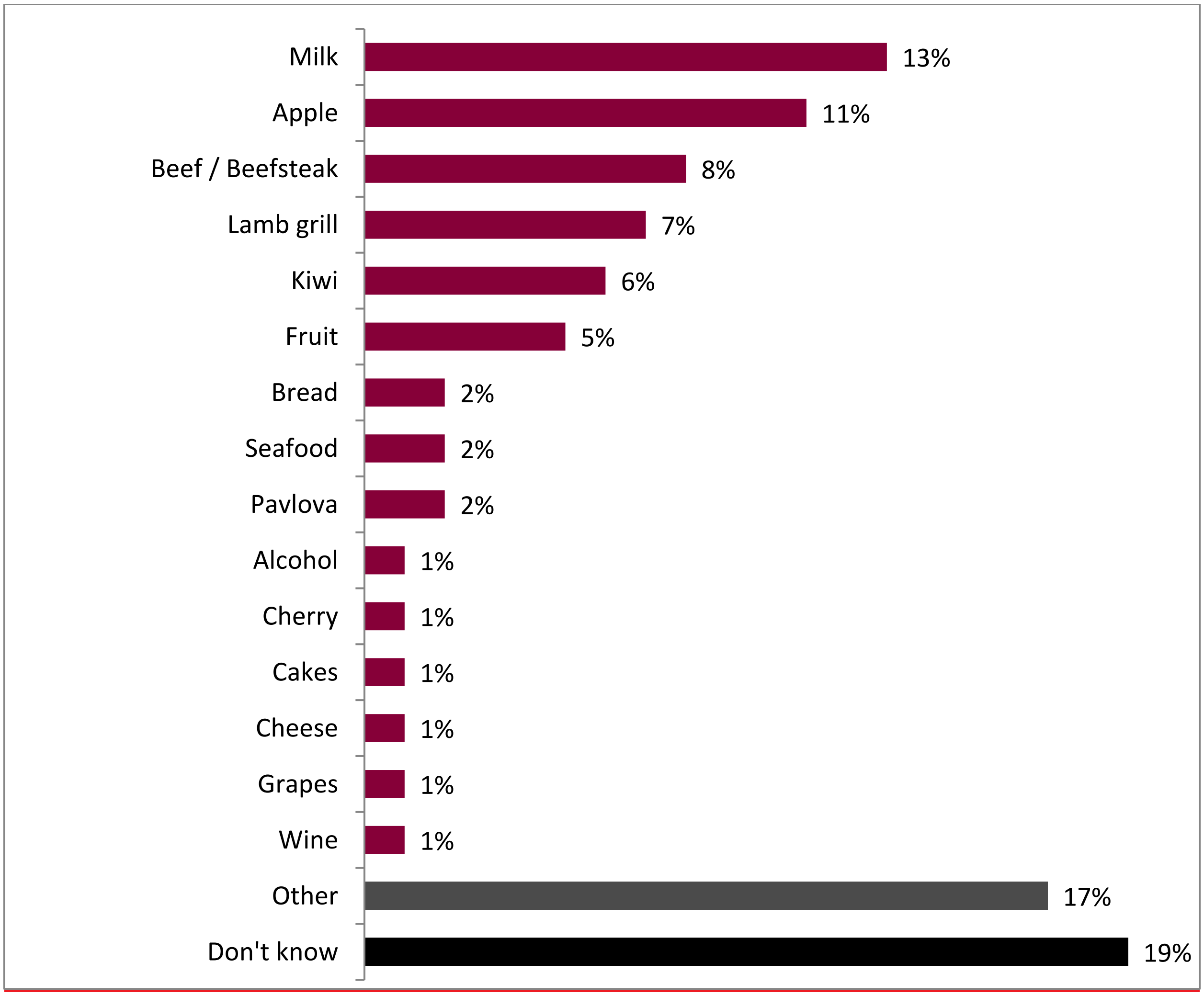


Q16: When it comes to food, what is the first thing that comes to your mind when you think of Australia?
Base: All respondents (n=2,301)
*Because respondents were able to give more than one answer, total mentions may exceed 100%.

Top of mind mentions – New Zealand food

Regarding New Zealand food, respondents think of milk (13%) and apples (11%). Other products, such as beef/beefsteak (8%), lamb grill (7%), kiwi (6%), and fruit (5%) were mentioned by fewer respondents. On the other hand, almost two in ten (19%) respondents did not know what food comes to their mind when thinking about New Zealand.

Figure 22: Top of mind mentions – New Zealand food

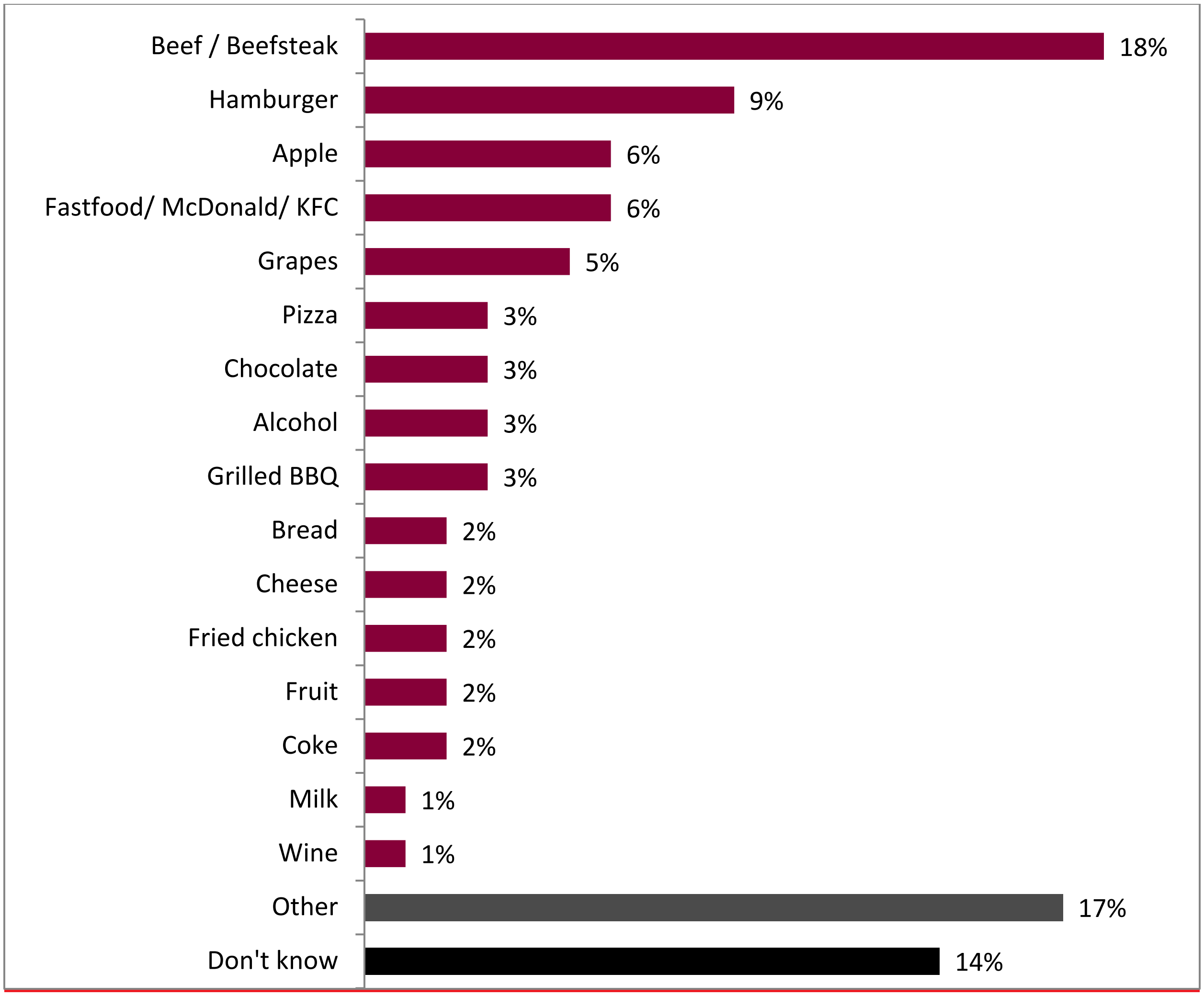


Q17: When it comes to food, what is the first thing that comes to your mind when you think of New Zealand? Base: All respondents (n=2,301)
*Because respondents were able to give more than one answer, total mentions may exceed 100%.

Top of mind mentions – American food

When thinking about American food, almost one fifth (18%) of respondents have mentioned beef or beefsteak. This is followed by hamburgers (9%) and apples (6%), and fast-food. While one in ten (14%) of respondents did not know what food comes to their mind when thinking about the United States.

Figure 23: Top of mind mentions – American food



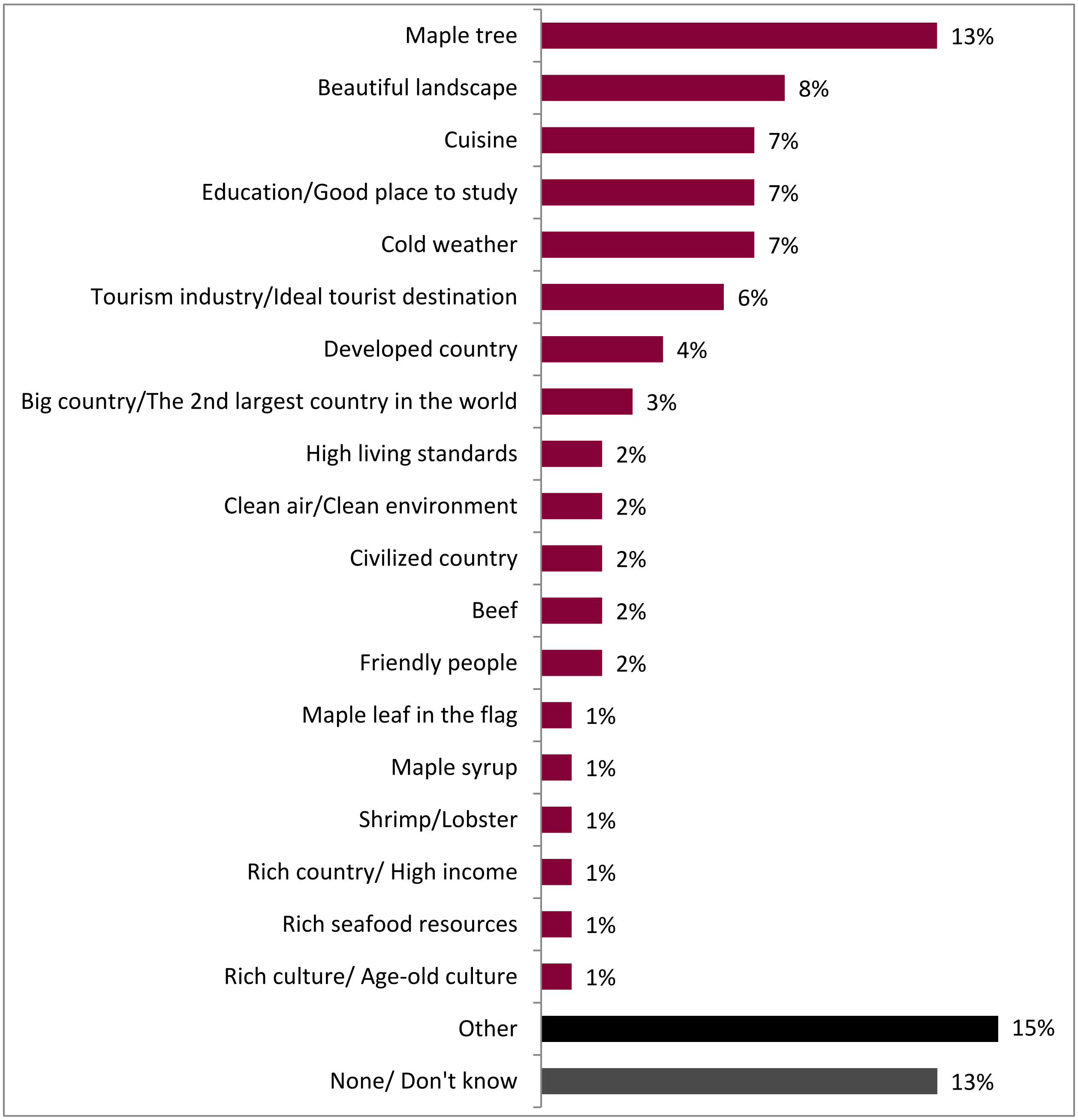
Q18: When it comes to food, what is the first thing that comes to your mind when you think of the United States? Base: All respondents (n=2,301)

*Because respondents were able to give more than one answer, total mentions may exceed 100%.

Top of mind mentions - Canada

Vietnamese consumers were asked what came to mind when thinking of Canada in general, and then Canadian food specifically. When thinking about Canada in general, the main things that comes to mind for are maple tree (13%), followed by a beautiful landscape (8%), cuisine (7%), the education system (7%), and cold weather (7%). One respondent out of ten (13%) does not know what comes to mind when thinking of Canada.

Figure 24: Top of mind mentions – Canada



Q14: In general, when you think of Canada, what is the first thing that comes to mind? Base: All respondents (n=2,301)

*Because respondents were able to give more than one answer, total mentions may exceed 100%.

Respondents who have had travelled abroad are more likely to have mentioned the following things when thinking of Canada:

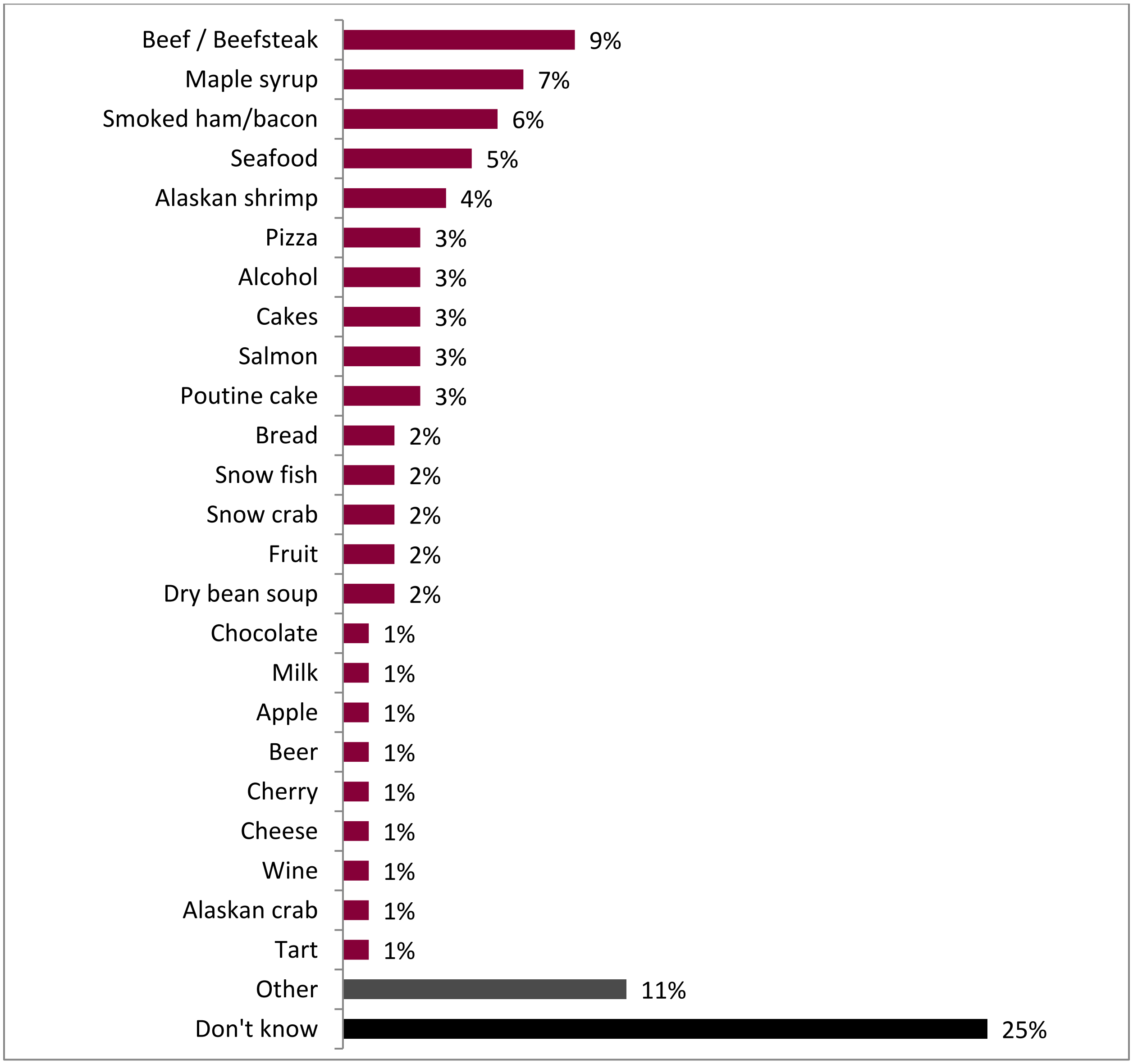
- maple tree (16%)
- education/good place to study (9%)
- cold weather (9%)
- high living standards (3%)

Top of mind mentions – Canadian food

When thinking about Canadian food, one respondent out of ten (9%) have mentioned beef/beefsteak, followed closely by maple syrup (7%), smoked ham/bacon (6%) and seafood (5%). All top of mind responses were mentioned by a low proportion of Vietnamese consumers, which points to a superficial knowledge of Canadian food and seafood products: no single Canadian product stands out.

A quarter (25%) of respondents did not know what food product comes to mind when thinking about Canada, which is higher than for other countries (Australia: 17%, New Zealand: 19%, and the United States: 14%). This further supports the observation that Canadian food products are not well known by Vietnamese consumers. This suggests there is a large opportunity to market Canadian products and increase their awareness among Vietnamese consumers.

Figure 25: Top of mind mentions – Canadian food



Q15: When it comes to food, what is the first thing that comes to your mind when you think of Canada?
Base: All respondents (n=2,301)
*Because respondents were able to give more than one answer, total mentions may exceed 100%.

Respondents who have purchased Canadian products in the past are more likely to have mentioned:

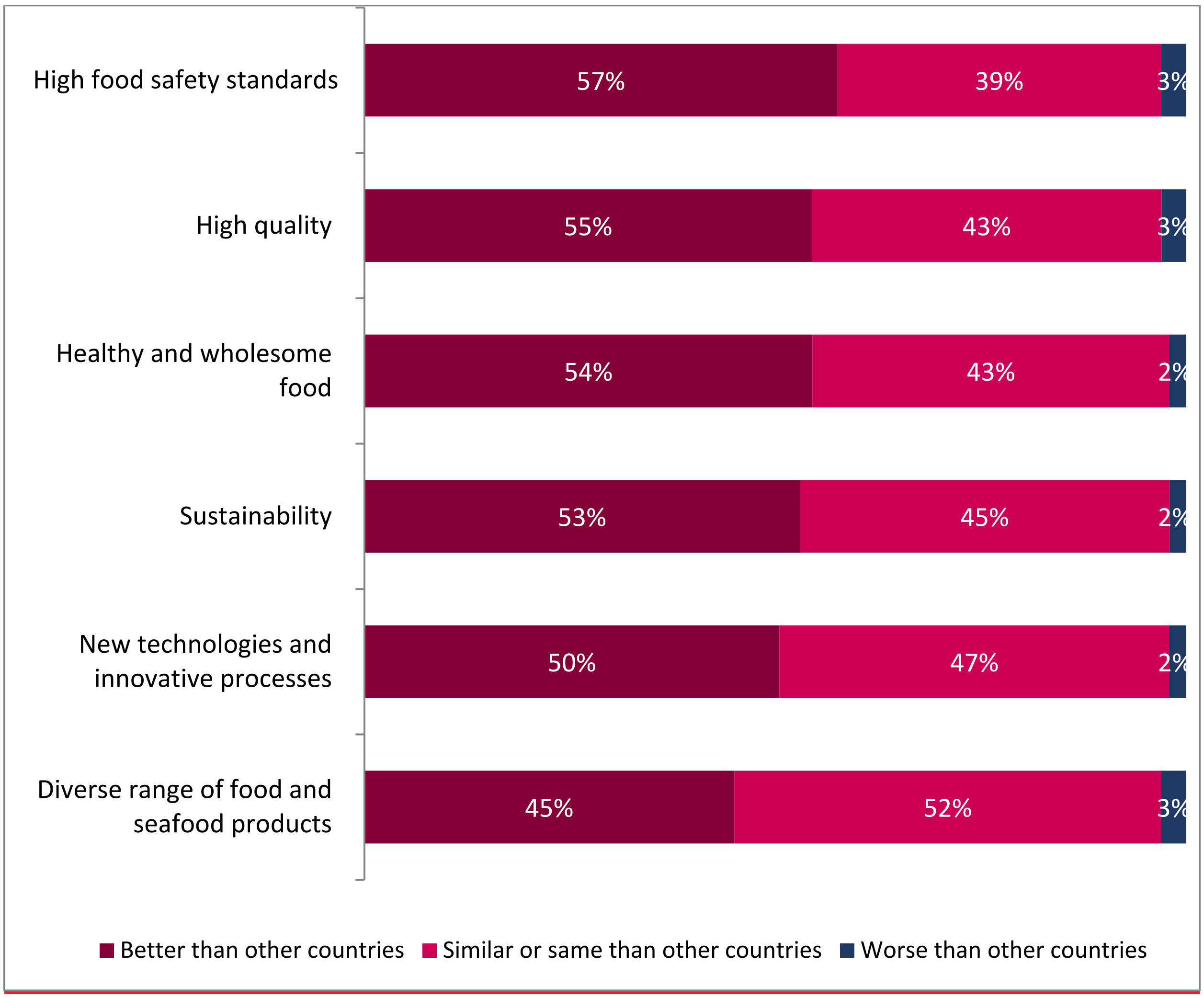
- beef/beefsteak (23%)
- maple syrup (9%)
- seafood (7%)
- apple (5%)
- alcohol (5%)
- wine (4%)
- cheese (3%)

- snow fish (3%)
- beer (2%)
- Alaskan crab (2%)

Rating Canada on various food related criteria

For every criterion, Canada is perceived as better than or similar to other countries. More specifically, more than half of respondents believe Canada is better than other countries for high food safety standards (57%), high quality (55%), the healthy and wholesome food (54%), and sustainability (53%). Slightly fewer respondents believe Canada is better than other countries regarding new technologies and innovative processes (50%). With regards to the diverse range of food and seafood products, less than half (45%) think Canada is better, while the remainder (52%) believe Canada is similar to other countries.

Figure 26: Rating Canada on various food related criteria



Q23: When it comes to food or seafood products, how would you rate Canada compared to other foreign countries who sell food and seafood in Vietnam? Base: All respondents (n=2,301)

Overall, men, older respondents (over 45 years old), those with high monthly food spending – roughly 1,640 cad, along with those who are interested in international food and cuisine, and respondents who purchased Canadian food or seafood products, were more likely to rate Canada better than other countries on all the criteria. The detailed breakdown is presented below.

The following subgroups were more likely to rate Canada better than other countries on high food safety standards:

- those with high monthly food spending (72%), compared to those with low spending (42%),
- men (68% versus 52% among women)
- those who purchase Canadian food or seafood products (67% versus 55%)
- those of 45 years of age or older (66% versus 52% among respondents aged 20 to 34-year-old)
- those interested in international food and cuisine (64% versus 32%)

The following subgroups were more likely to rate Canada better than other countries on high quality:

- those with high monthly food spending (69%), compared to those with low spending (41%),
- men (67% versus 49% among women)
- those who have an interest in international food and cuisine (60% versus 33%)
- those who have an interest in buying Canadian food products (63% versus 24%)
- those 45 years of age or older (62% versus 51% among those aged 20 to 34 years-old)

The following subgroups were especially likely to rate Canada better than other countries on healthy and wholesome food:

- men (65% versus 39% among women)
- those of 45 years of age or older (63% versus 49% among 20 to 34-year-olds)
- those who have an interest in buying Canadian food products (62% versus 26%)
- those who have an interest for international food and cuisine (60% versus 35%)

The following subgroups were especially likely to rate Canada better than other countries on sustainability:

- those with high monthly food spending (70%), compared to those with low spending (41%),
- men (65% versus 47% among women)
- those who have an interest in buying Canadian food products (59% versus 31%)
- those who have an interest for international food and cuisine (57% versus 35%)
- those of 45 years of age or older (61% versus 47% among 20 to 34-year-olds)

The following subgroups were especially likely to rate Canada better than other countries on new technologies and innovative processes:

- those with high monthly food spending (77%), compared to those with low spending (35%),
- men (61% compared to 4% among women)

- those who have an interest in buying Canadian food products (58% versus 30%)
- those who have an interest in international food and cuisine (55% versus 39%)
- those of 45 years of age or older (56% compared to 47% among 20 to 34-year-olds)

The following subgroups were especially likely to rate Canada better than other countries on diverse range of food and seafood products:

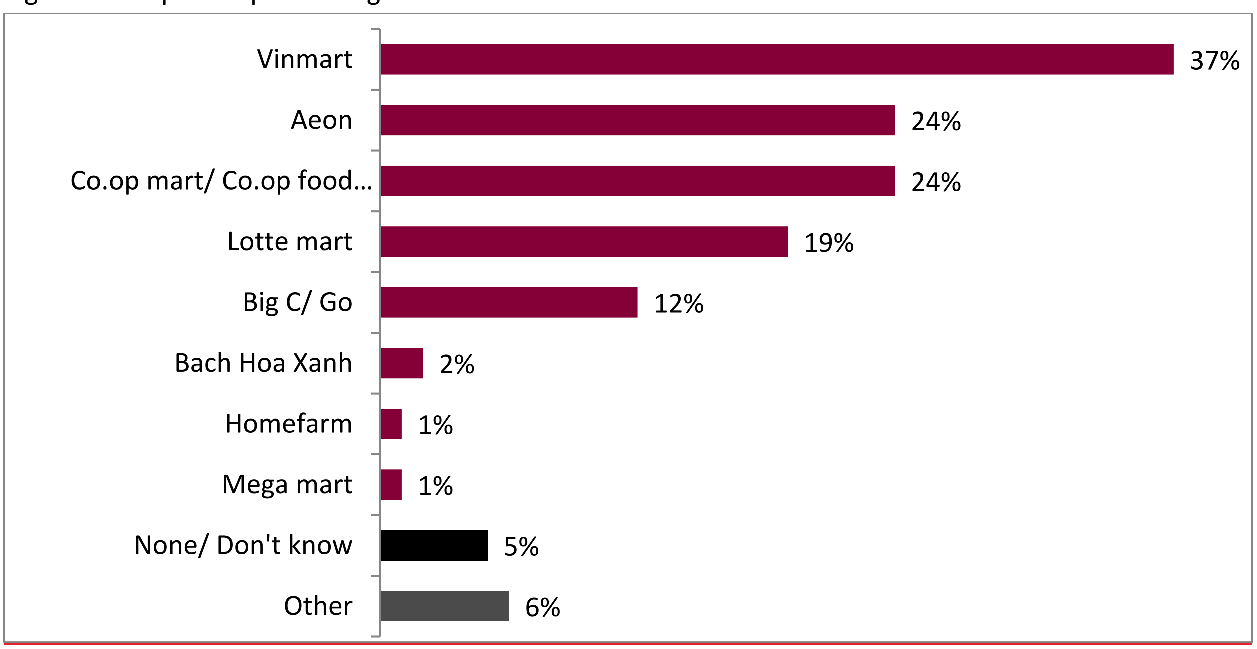
- those with high monthly food spending (72%), compared to those with low spending (33%)
- men (54% versus 41% among women)
- those who have an interest in international food and cuisine (49% versus 35%)
- those of 45 years of age or older (52% versus 39% among those aged 20 to 34-year-old)
- those who have an interest in buying Canadian food products (52% versus 29%)

Purchasing locations and inspiration

In-person purchasing of Canadian food

More than a third (37%) of respondents mentioned VinMart as the in-person store they would visit to buy Canadian food and a quarter mentioned Aeon (24%) and Co.op mart/Co.op food mart (24%). Those who purchased Canadian food and seafood products were especially likely to purchase from Lotte mart (24% versus 17%), and Homefarm (6% versus 0%).

Figure 27: In-person purchasing of Canadian food



Q24B: Which specific in-person stores would you visit to purchase Canadian food? Please specify the names of stores. Base: All respondents (n=2,301)
*Because respondents were able to give more than one answer, total mentions may exceed 100%.

The following subgroups were especially likely to shop at VinMart:

- those of 20 to 34 years of age (41% compared to 30% among those aged 45 or older)
- men (41% versus 34% among women)
- those living in Da Nang (51%), Hai Phong (50%), and Hanoi (46%), compared to those living in Khanh Hoa (28%) and Can Tho (28%)

The following subgroups were especially likely to shop at Aeon:

- those living in Hai Phong (44%), compared to those living in Khanh Hoa (9%) and Da Nang (17%),
- men (28% versus 22% among women)
- those interested in buying Canadian food products (26% versus 6%)

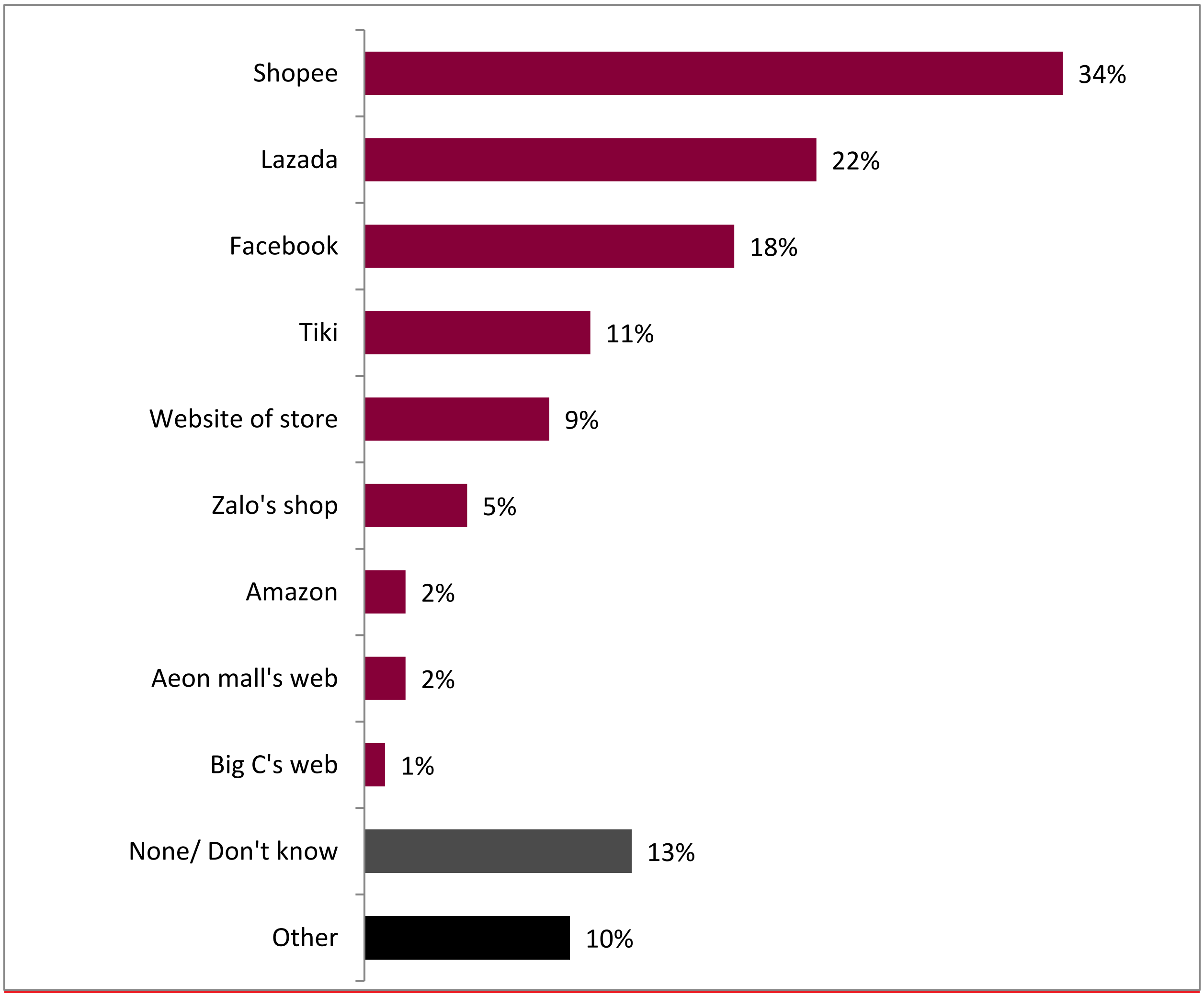
The following subgroups were especially likely to shop at Co.op mart/Co.op food mart:

- those living in Khanh Hoa (34%) and Ho Chi Minh (31%), compared to those living in Hanoi (8%) and Hai Phong (17%),
- those with low monthly household incomes (31% versus 17% among high incomes)
- those who are not interested in international food and cuisine (31% versus 22%).

Online purchasing of Canadian food

When it comes to purchasing Canadian food products online, a third (34%) of Vietnamese consumers said they would visit Shopee to purchase Canadian food followed by Lazada (22%) and Facebook (18%). Those who purchased Canadian food or seafood products were more likely to shop on Facebook (24% versus 16%) and Lazada (26% versus 20%).

Figure 28: Online store purchasing of Canadian food



Q24A: Which specific online stores would you visit to purchase Canadian food? Base: All respondents (n=2,301)
*Because respondents were able to give more than one answer, total mentions may exceed 100%.

The following subgroups were especially likely to shop at Shopee:

- men (40% versus 31% among women)
- those of 20 to 34 years of age (37% compared to 30% among those aged 45 and older)
- those living in Ho Chi Minh (37%) compared to those living in Hai Phong (25%)

The following subgroups were especially likely to shop at Lazada:

- those living in Da Nang (28%) and Ho Chi Minh (27%), compared to those living in Hanoi (15%),
- those who have bought Canadian food or seafood products (26% versus 20%)
- those of 35 to 44 years of age (25% compared to roughly 20% among other ages)
- men (24% versus 20% among women)

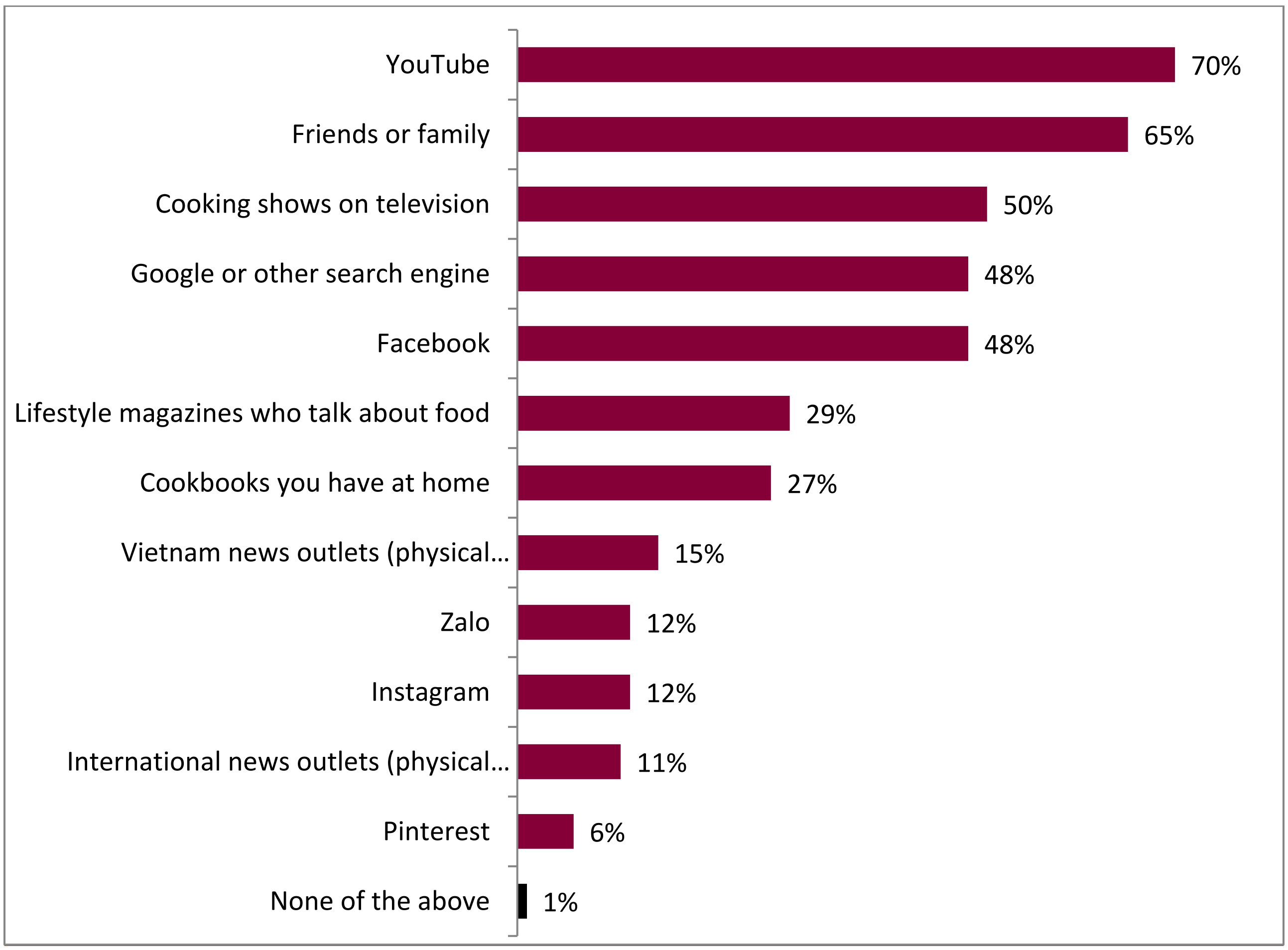
The following subgroups were especially likely to shop on Facebook:

- those living in Hai Phong (25%) compared to those living in Can Tho (11%) or Ho Chi Minh (15%)
- those who have bought Canadian food or seafood product (24% versus 16%)
- those without children in the household (23% versus 17%)
- women (21% versus 12% among men)
- those with low monthly household incomes (21% versus 14% among high incomes)

Sources of inspiration and information for food products

The majority (70%) of respondents have mentioned YouTube as a source of inspiration and information when it comes to cooking and food. While other sources respondents turn to or look for inspiration and information are friends and family (65%), cooking shows on television (50%), Google or other search engines (48%) and Facebook (48%). Only 1% of respondents do not consult any sources for cooking inspiration.

Figure 29: Sources of inspiration and information for food products



Q25: When it comes to cooking and food, where do you turn to for inspiration and/or to look for information of food and seafood? Check all that apply. Base: All respondents (n=2,301)
*Because respondents were able to give more than one answer, total mentions may exceed 100%.

While higher income earning, younger, Ho Chi Minh residents were more likely to turn to YouTube for inspiration, those who mainly shopped at traditional local markets turned to friends and family for information and inspiration about Canadian food products.

The following subgroups were more likely to turn to YouTube for cooking or food inspiration:

- those with high incomes (79% versus 62% among low incomes)
- men (76% versus 67% among women)
- those living in Ho Chi Minh (78%) compared to 57% among those living in Hanoi and 63% among those living in Hai Phong
- those of 20 to 34 years of age (74% versus 62% among those who are 45-year-old or more)

The following subgroups were more likely to turn to friends and family for cooking or food inspiration:

- men (69% compared to 63% among women)
- those who buy their food at a local market (69% versus 42% among those who buy in independent branded food stores)
- those living in Ho Chi Minh (68%)

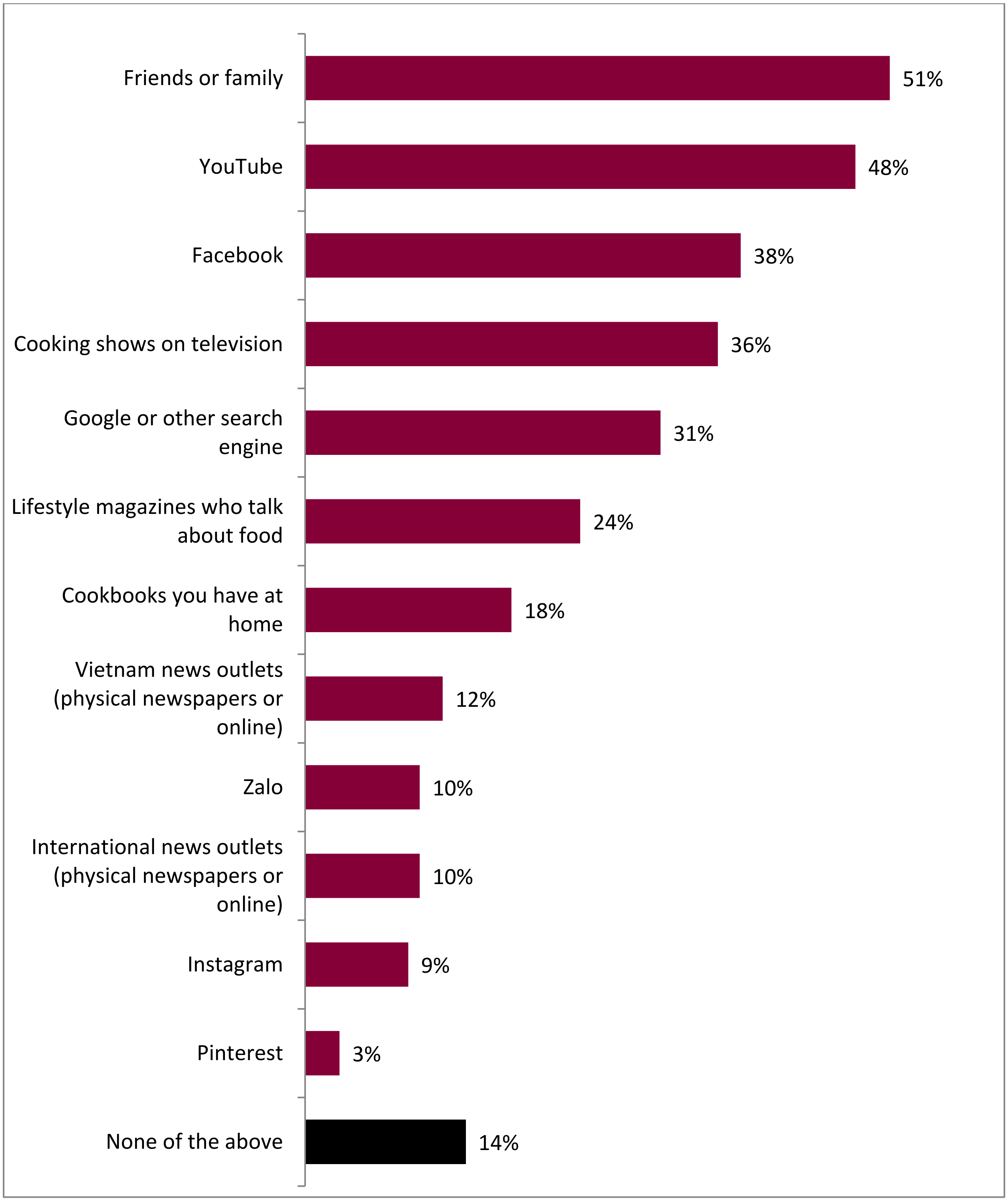
The following subgroups were more likely to consult no source for inspiration:

- those who are not interested in buying Canadian food products (6% versus 0%)
- those who do not have an interest in international food and cuisine (4% versus 0%)

Influence of various sources on food purchasing decisions

Friends and family (51%) and YouTube (48%) are not only the most popular sources of information, but they also influence respondents when it comes to buying food or seafood products imported into Vietnam. On the other hand, about one in ten (14%) respondents mentioned not consulting any sources.

Figure 30: Influence of various sources on food purchase decisions



Q26: And have you ever bought a food or seafood product imported into Vietnam after seeing/reading/hearing something about it on… (check all that apply) Base: All respondents (n=2,301)

Respondents who bought a food product after seeing, reading or hearing something about it through friends or family were likely to be:

- those with a moderate to high income (55% for each category versus 38% among low incomes)
- men (59% versus 47% among women)
- those living in Hanoi (58%) and Ho Chi Minh (57%) compared to those living in Can Tho (30%), Hai Phong (38%) and Khanh Hoa (42%)
- those who buy food in-store at a major grocery store chain (55%) compared to 48% among those who shop at local markets

The following subgroups were more likely to buy food or seafood products after seeing, reading or hearing something about it on YouTube:

- those with high incomes (64%) compared to those with low incomes (32%)
- those living in Da Nang (68%) and Ho Chi Minh (57%), compared to those living in Hanoi (41%) or Hai Phong (37%)
- men (59% versus 42% among women)
- those of 20 to 34 years of age (50% compared to 43% among those aged 45 or older)

The following subgroups were more likely to not consult any sources:

- those living in Haig Phong (31%) and Can Tho (31%) compared to those living in Hanoi (5%) and Ho Chi Minh (8%)
- those without children in the household (24% versus 11%)
- those of 45 years of age or older (19% versus 11% among 20 to 34 year-olds)

Conclusion

Several key trends relating to Vietnamese consumer perceptions about Canadian food and seafood products have been highlighted throughout the study.

Vietnamese consumers shop for food several times a week and spend on average around $164 to $409 (3,000,001 to 7,500,000 vnd) monthly. Purchasing in-store at local markets and major grocery store chains are the most popular ways to buy groceries.

Although Vietnamese consumers shop mainly in local markets, a vast majority of them have bought international food products in the past year, and they are open to experimenting with food and cuisine. A majority of them have also travelled abroad, for work, education, or vacation.

A significant opportunity, therefore, exists to leverage Vietnamese interest in international food products. A majority of them are interested in buying food products from Canada, right behind the United States and Australia.

Canadian products benefit from a positive reputation among consumers in Vietnam, as it is rated better than other countries on almost all criteria asked about, including food safety standards, high quality, healthy and wholesome food, sustainability, new technologies and innovative processes and a diverse range of food and seafood products. Furthermore, the interest in Canadian food products is high even among those who have not bought any in the past year, as around two thirds of respondents declared being interested in purchasing food from Canada.

When thinking of Canadian products, no single item came out on top of the spontaneous mentions, which shows a shallow knowledge of Canadian food products. However, beef/beefsteak, maple syrup and ham/bacon were the top Canadian food products that Vietnamese consumers thought of.

But even though unaided knowledge of Canadian food products might be low, a majority of Vietnamese consumers remember seeing a Canadian food product in the past year. Canada also benefits from a widely positive opinion, as it is rated better than other countries on all criteria that were important for Vietnamese consumers.

Around one in five consumers have purchased Canadian food products in the past year. Most of them are located in Ho Chi Minh and Hanoi and make over 15,000,000 vnd monthly (roughly $825 – which is a moderate to high income). They spent more than average on groceries monthly and are more likely to shop at major grocery chains. Stores like VinMart, Aeon and Coopmart could be great channels to reach these purchasers.

While this study has enabled us to draw an overall portrait of the attitudes of Vietnamese consumers towards Canadian food and seafood products, further qualitative studies could be conducted in order to unravel deeper insights into the subject. Namely, taking a closer look into the motivations of Vietnamese consumers to purchase Canadian food and seafood products, as well as their needs in terms of food and seafood products, could provide invaluable additional knowledge on this foreign market.

Appendix

Quantitative methodology

Quantitative research was conducted through a hybrid method combining online internet panel surveys using Computer Aided Web Interviewing Technology (CAWI) and face-to-face (F2F) interviews. F2F interviews were conducted to balance out the lack of panel coverage in certain regions.

As a Canadian Research Insights Council (CRIC) member, Leger adheres to the most stringent guidelines for quantitative research. The survey was conducted in accordance with Government of Canada requirements for quantitative research, including the Standards of the Conduct of Government of Canada Public Opinion Research—Series D—Quantitative Research.

Respondents were assured of the voluntary, confidential and anonymous nature of this research. As with all research conducted by Leger, all information that could allow for the identification of participants was removed from the data, in accordance with the Privacy Act.

The questionnaire is available in Appendix A2.

Sampling procedure

Computer Aided Web Interviewing (CAWI) and face-to-face interviewing

Leger conducted a panel-based internet survey and face-to-face survey with a sample of Vietnamese consumers, between the ages of 20 and 54 years, who are responsible for grocery shopping in their household. Data was collected by Leger's supplier, Indochina Research, based in Vietnam. The survey questionnaire was translated and adapted to Vietnamese by the supplier, in order to ensure optimal understanding of the survey questions by Vietnamese consumers.

A total of 2,301 respondents participated in the survey. The exact distribution is presented in the following section. For the online portion, participant selection was done randomly from Indochina Research's online panel. Panel members were recruited from previous market research projects and social media advertisement.

For the face-to-face portion, a number of wards were randomly selected in each city. The following table details the regional distribution of respondents and the data collection method used for each region. Since some regions were poorly covered by the web panel, face-to-face interviews were conducted in those regions to ensure representativeness and optimal sample distribution. The baseline sample attempted to replicate as closely as possible the actual distribution of the Vietnamese population.

Table A.2: Regional distribution of respondents and data collection method

Region	Cities	Main urban		Main rural	Booster urban	Total (n=)
		Online	F2F	F2F	F2F	
North	Hanoi	300		100	150	550
North	Hai Phong	100		50		150
North	Nam Dinh (Nam Dinh)		100			100
North	Son La (Son La)		100			100
Center	Da Nang	100		50		150
Center	Nha Trang (Khanh Hoa)	100		50		150
Center	Vinh (Nghe An)		100			100
Center	Buon Ma Thuot (Dak Lak)		100			100
South	Ho Chi Minh City	300		100	150	551
South	Can Tho	100		50		150
South	Vinh Long (Vinh Long)		100			100
South	Bien Hoa (Dong Nai)		100			100
	Total sample	**1,000**	**600**	**400**	**300**	**2,301**

Data Collection

Fieldwork for the survey was conducted from February 26 to March 15, 2022. The participation rate for the survey was 16%. A pre-test of 22 interviews was completed on February 22, 2022.

To achieve data reliability in all subgroups, a total sample of 2,301 Vietnamese consumers were surveyed, in the targeted regions of the country. The sample included 2,000 Vietnamese consumers with demographic characteristics representative of the population, and a booster of 301 Vietnamese consumers who purchased Canadian food or seafood products in the past year.

Since a sample drawn from an internet panel is not probability-based, the margin of error cannot be calculated for this survey. Respondents for this survey were selected from among those who have volunteered to participate/registered in online surveys. The results of such surveys cannot be described as statistically projectable to the target population. The data have been weighted to reflect the demographic composition of the target population. Because the sample is based on those who initially self-selected for participation, no estimates of sampling error can be calculated.

Based on data from General Statistics Office of Vietnam’s 2019 Census and internal analytics by Indochina Research projecting the population in urban and rural towns, the results of this survey were weighted by age, city and urban/rural.

Regional quotas were set in order to ensure a representative sample of the Vietnamese population. The following table details the set quotas and the final distribution of the sample.

Table A.3: Established quotas and final sample distribution by region

Region	Key markets	Main urban	Main rural	Booster urban	Total quotas (n=)	Final sample (n=)
North	Hanoi	300	100	150	550	550
North	Hai Phong	100	50		150	150
North	Other Key cities - North	200			200	200
Center	Da Nang	100	50		150	150
Center	Nha Trang	100	50		150	150
Center	Other Key cities - Center	200			200	200
South	Ho Chi Minh	300	100	150	550	551
South	Can Tho	100	50		150	150
South	Other Key cities - South	200			200	200
	Total sample	**1,600**	**400**	**300**	**2,300**	**2,301**
	Community size distribution	**80%**	**20%**			

Participation rate

Below is the calculation of the survey's participation rate. The overall participation rate for this study is 15.77%. The participation rate is calculated using the following formula: Participation rate = R ÷ (IS + R). The table below provides details of the calculation. Participation rate was calculated on the basis of the initial 2,000 Vietnamese consumers – excluding the booster sample.

Table A.4: Participation rate calculation - main sample

Sample	Status	Number
In-scope non-responding units (IS)	Non-response from eligible respondents	38,160
	Respondent refusals	5,814
	Screen-outs	3,117
	Early breakoffs	177
Responding units (R)	Surveys disqualified – quota filled	6,127
	Completed surveys disqualified for other reasons	730
	Completed interviews	2,000
Final results	Potentially eligible (IS+R)	56,143
	Participation rate	15.77%

A participation rate of 16% is considered good in the Vietnamese context, and several factors explain such a positive rate: selection criteria were not strict, as all people from 20 to 54 and partly or fully in charge of grocery shopping were eligible, the study topic is of general interest, and the survey was short. Completion of the survey took between 10 to 15 minutes for online participants and 15 to 20 minutes for face-to-face respondents.

Unweighted and weighted samples

A basic comparison of the unweighted and weighted sample sizes was conducted to identify any potential non-response bias that could be introduced by lower response rates among specific demographic subgroups (see tables below).

The table below presents the geographic distribution of respondents, before and after weighting. The weighting adjusted for some discrepancies due to quotas that were placed on certain regions in order to have a sufficient sample in these regions.

Table A.5: Unweighted and weighted sample distribution by province

Region	Unweighted	Weighted
Hanoi	550	577
HCM	551	1,028
Hai Phong	150	113
Khanh Hoa	150	75
Da Nang	150	118
Can Tho	150	77
Other	600	312
Total	**2,301**	**2,301**

The following tables present the demographic distribution of respondents, according to community size and age.

First, regarding community size, weighting adjusted slightly the proportions of urban, suburban, and small town. The adjustments made by weighting are minor, and the small differences observed in the effective samples could not have introduced a non-response bias for either of these two sample subgroups.

Table A.6: Unweighted and weighted sample distribution by community size

Region	Unweighted	Weighted
Urban	1,824	1,922
Suburban	290	261
Small town	187	118
Total	**2,301**	**2,301**

Regarding age distribution, the weighting process has corrected some minor discrepancies. The actual distribution of the sample generally follows the distribution of age groups in the actual population. In this case, it is unlikely that the observed distributions introduce a non-response bias for a particular age group. Because the differences were so small, weighting allowed the weights to be corrected without further manipulation.

Table A.7: Unweighted and weighted sample distribution by age group

Region	Unweighted	Weighted
Between 20 and 34	1,131	1,079
Between 35 and 44	747	678
45 and over	423	544
Total	**2,301**	**2,301**

As demonstrated, the subgroup sizes were readjusted according to their importance in the general population. To do so, subgroups are multiplied by factors that balance their importance. Weighting factors enable to give certain groups a higher or lower importance in the sample. The relatively small weight factors (see section below) and differences in responses between various subgroups suggest data quality was not affected. The weight applied corrected the initial imbalance for data analysis purposes and no further manipulations were necessary.

The following tables present the weighting factors applied to the database according to the different respondent profiles. Respondents from Ho Chi Minh represent a large proportion of the sample: over half of the rural sample (57%) and around two fifths of the urban sample (42%).

Table A.8: Weight factors by city

Region	Cities	Percent urban	Percent rural
North	Hanoi	24%	19%
North	Hai Phong	6%	3%
North	Nam Dinh (Nam Dinh)	2%	
North	Son La (Son La)	1%	
Center	Da Nang	6%	3%
Center	Nha Trang (Khanh Hoa)	2%	11%
Center	Vinh (Nghe An)	3%	
Center	Buon Ma Thuot (Dak Lak)	3%	
South	Ho Chi Minh City	42%	57%
South	Can Tho	3%	6%
South	Vinh Long (Vinh Long)	1%	
South	Bien Hoa (Dong Nai)	7%	

Table A.9: Weight factors by age

Age group	Percent
20 to 24	13%
25 to 29	17%
30 to 34	17%
35 to 39	15%
40 to 44	13%
45 to 49	13%
50 to 54	11%
Total	**100%**

Survey questionnaire

Section introduction

[Programmer notes:]

Introduction

[CATI] Dear Mr/Mrs, Indochina Research is currently conducting interviews nationwide about food shopping. The interview will take approximately 15 minutes.

In this survey, food shopping includes buying eatable, drinkable products. This includes raw foods, processed, cooked, and canned foods.; both food and drink products.

If you would answer some questions and tell us what you think, your responses in this survey will provide valuable insight to develop better products.

Indochina Research absolutely guarantees that all answers you provide will be treated confidentially and will only be analyzed in a summarized form, so that identification of specific individuals is impossible.

Or

[online] You are invited to participate in a research study conducted by Indochina Research Vietnam, an independent research company.

This study is looking to understand the food shopping habit of Vietnamese people. The survey will take approximately 15 minutes.

In this survey, food shopping includes buying eatable, drinkable products. This includes raw foods, processed, cooked, and canned foods.; both food and drink products.

Your individual answers will remain confidential and only be shown as aggregated with all other participants in the report. [See confidentiality terms]

If you have any questions, feel free to contact us through our representatives at vietnam@indochinaresearch.com

Thank you for your genuine participation in this study.

Giới Thiệu

[CATI] Xin chào anh/chị. Chúng tôi đến từ Công ty Nghiên cứu thị trường Đông Dương và chúng tôi đang thực hiện khảo sát về hành vi mua sắm đồ ăn, thực phẩm của người tiêu dùng Việt Nam. Khảo sát này sẽ mất khoảng 15 phút để hoàn thành.

Trong khảo sát này, mua sắm thực phẩm, đồ ăn bao gồm mua sắm các đồ có thể ăn, uống được. Những đồ này bao gồm cả đồ uống và thức ăn sống, đã được chế biến, hoặc đồ đóng hộp, đóng gói

Nếu anh/chị có thể dành thời gian trả lời các câu hỏi trong khảo sát này, câu trả lời của anh/chị sẽ cung cấp cho chúng tôi biết nhiều thông tin giá trị. Chúng tôi cam kết bảo mật thông tin đối với tất cả câu trả lời mà anh/chị cung cấp tại khảo sát.

[online] Anh/chị được mời tham gia vào khảo sát thực hiện bởi Indochina Research, là một công ty nghiên cứu thị trường độc lập ở Việt Nam.

Khảo sát này tìm hiểu về thói quen mua sắm thực phẩm, đồ ăn của người Việt Nam. Khảo sát này sẽ mất khoảng 15 phút để hoàn thành.

Trong khảo sát này, mua sắm thực phẩm, đồ ăn bao gồm mua sắm các đồ có thể ăn, uống được. Những đồ này bao gồm cả đồ uống và thức ăn sống, đã được chế biến, hoặc đồ đóng hộp, đóng gói.

Câu trả lời của anh/chị sẽ được hoàn toàn bảo mật và chỉ được biểu diễn, phân tích sau khi đã tổng hợp với thông tin của đáp viên khác. [Xem điều khoản bảo mật]

Nếu anh/chị có câu hỏi nào khác, liên hệ với chúng tôi tại vietnam@indochinaresearch.com

Cảm ơn anh/chị vì đã dành thời gian tham gia khảo sát này.

Do you agree to participate?

Anh/chị có đồng ý tham gia khảo sát không?

Label English	**Label Vietnamese**	**Value**	**Attribute**	**Termination**
Yes	Có	1		
No	Không	2		**Terminate**

Part 1. Screening
Phần 1. Gạn lọc

[Questions to include in this section: s1 to s8]
[Programmer notes:]

Qstscrn

[All respondents]

[Single mention]
[list order: In orderIn order]
[programmer notes:]
[validation:]

S1. Are you responsible, in total or in part, for shopping for food products in your household?
S1. Anh/chị có phải là người chịu trách nhiệm trong việc mua sắm thực phẩm, đồ ăn cho gia đình không?

Label English	Label Vietnamese	Value	Attribute	Termination
All or most of it	Tôi là người chịu trách nhiệm chính hoặc chịu trách nhiệm phần lớn	1		
In part	Tôi là người chịu trách nhiệm một phần	2		
No	Không	3		**Terminate**

S2. What is your year of birth?
S2. Anh/chị sinh năm nào?
[S3] **Scriptor:** respondents submit year of birth, then calculate age for screening

	Value	Attribute	Termination
[Enter year of birth]	Năm sinh	Go to S4 if age from 20 to 54	
[Enter year of birth]	Năm sinh		**Terminate if outside 20 or 54**

[all respondents]
[single mention]
[list order: In orderIn order]
[programmer notes:]
[validation:]
S3. Where in Vietnam do you live?
S3. Hiện tại, anh/chị đang sống ở tỉnh/thành phố nào?

Label English	Label Vietnamese	Value	Attribute	Termination
Hà Nội	Hà Nội	1		
Hồ Chí Minh City	TP. Hồ Chí Minh	2		
Hải Phòng	Hải Phòng	3		

Khánh Hòa	Khánh Hòa	4		
Đà Nẵng	Đà Nẵng	5		
Cần Thơ	Cần Thơ	6		
[list of other provinces]	[danh sách các tỉnh/ thành khác]	99		

[all respondents]
[list order: In order]
[programmer notes:]
[validation:]

S3A. In which District do you live?

S3A. Anh/chị đang sống ở quận/huyện nào

Label English	Label Vietnamese	Value	Attribute	Termination
[list of districts in (S5)]	[danh sách các quận/huyện tương ứng với câu trả lời (S5)]		O	

[all respondents]
[list order: In order]
[programmer notes: optional question]
[validation:]

S3B. In which Ward do you live?

S3B. Anh/chị đang sống ở phường/xã nào

Label English	Label Vietnamese	Value	Attribute	Termination
[list of ward in (S5A)]	[danh sách các phường/xã tương ứng với câu trả lời (S5A)]		O	

[all respondents]
[single mention]
[list order: In order]
[programmer notes:]
[validation:]

S4. And, do you live in a …

S4. Hiện tại, anh/chị đang sống ở…

Label English	Label Vietnamese	Value	Attribute	Termination
… large city	… thành phố lớn	1	Move S7	

… suburb of large city	… vùng ngoại ô của một thành phố lớn	2	Move S7	
… in a small town	… thị trấn, thị xã	3	Move S7	terminate if not in 6 key markets only
… in a rural area	… vùng nông thôn	4		terminate

[all respondents]
[single mention]
[list order: In order]
[programmer notes:]
[validation:]
S5. Including yourself, how many people live in your household, counting adults and children?
S5. Hiện tại, trong gia đình của anh/chị có bao nhiêu người, bao gồm cả người lớn, trẻ nhỏ và cả bản thân anh/chị?

Label English	Label Vietnamese	Value	Attribute	Termination
_____________ people	_____________ người			

[all respondents]
[single mention]
[list order: In order]
[programmer notes:]
[validation: S6 < S5]
S6. Of these [pipe: S5] people who live in your household, how many are children under the age of 18?
S6. Trong số [S5] người trong gia đình của anh/chị, có bao nhiêu người là trẻ em dưới 18 tuổi?

Label English	Label Vietnamese	Value	Attribute	Termination
___________children under the age of 18	___________trẻ em dưới 18 tuổi			

Part 2: General shopping habits
Phần 2: Thói quen mua đồ ăn, thực phẩm
[questions to include in this section: Q1-Q5]
[programmer notes:]

General Shopping Habits

The following section will focus on your general shopping habits.

Phần khảo sát tiếp theo sẽ tìm hiểu về thói quen mua thực phẩm, đồ ăn của anh/chị

[all respondents]
[single mention]
[list order: In order]
[programmer notes:]
[validation: minimum value of 1,000,000 vnd]

Q1. Approximately how much does your household spend on food purchases per month?

Q1. Trung bình một tháng gia đình anh/chị chi bao nhiêu cho mua sắm thực phẩm?

Statements English	Statements Vietnamese	Value	Attribute	Termination
Less than 1,000,000 vnd	Dưới 1,000,000 vnd	1		
From 1,000.001 to 2,000,000 vnd	Từ 1,000.001 vnd đến 2,000,000 vnd	2		
From 2,000.001 to 3,000,000 vnd	Từ 2,000.001 vnd đến 3,000,000 vnd	3		
From 3,000.001 to 4,000,000 vnd	Từ 3,000.001 vnd đến 4,000,000 vnd	4		
From 4,000.001 to 5,000,000 vnd	Từ 4,000.001 vnd đến 5,000,000 vnd	5		
From 5,000.001 to 7.500,000 vnd	Từ 5,000.001 vnd đến 7.500,000 vnd	6		
From 7.500.001 to 10,000,000 vnd	Từ 7.500.001 vnd đến 10,000,000 vnd	7		
From 10,000.001 to 12.500,000 vnd	Từ 10,000.001 vnd đến 12.500,000 vnd	8		
From 12.500.001 to 15,000,000 vnd	Từ 12.500.001 đến 15,000,000 vnd	9		
From 15,000.001 to 20,000,000 vnd	Từ 15,000.001 đến 20,000,000 vnd	10		
From 20,000.001 to 25,000,000 vnd	Từ 20,000.001 đến 25,000,000 vnd	11		
From 25,000.001 to 30,000,000 vnd	Từ 25,000.001 đến 30,000,000 vnd	12		
More than 30,000,000 vnd	Trên 30,000,000 vnd	13		

base
[single mention: Grid table]
[list order: In order]
[statement list order: In order]
[programmer notes:]
[validation:]

Q2. In the past three months have you purchased food at the following: (click as many as apply)

Q2. Trong vòng 3 tháng gần nhất, anh/chị có mua sắm thực phẩm, đồ ăn tại địa điểm nào sau đây hay không? Hãy chọn tất cả các phương án trả lời phù hợp

Statements English	Statements Vietnamese	Value	Attribute	Termination
In store at a major grocery store chain (like Big C, VinMart, Coopmart)	Chuỗi siêu thị lớn (ví dụ BigC, VinMart, Coopmart,…)	1		
In store at a department store (like LotteMart in Lotte Department Store, Aeon)	Trung tâm thương mại (ví dụ LotteMart, Aeon)	2		
In independent branded food store (like An Nam Gourmet, Homefarm, Soi Bien, v.v…)	Cửa hàng thực phẩm có thương hiệu riêng (ví dụ An Nam Gourmet, Homefarm, Sói Biển v.v…)	3		
In special food store (eg: seafood store, imported fruit store)	Cửa hàng thực phẩm chuyên biệt (ví dụ cửa hàng hải sản Daohaisan, v.v…, cửa hàng hoa quả nhập khẩu Klever Fruit, v.v…)	4		
In store at a convenience store (like Circle K, 7 Eleven)	Cửa hàng tiện lợi (ví dụ Circle K, 7Eleven, …)	5		
In store at an independent traditional grocery store	Cửa hàng tạp hóa truyền thống	6		
In store at a local market	Chợ gần nơi sống	7		
Online for home delivery	Mua qua mạng và đồ được giao đến tận nhà	8		
Online for pickup in store (or curbside)	Mua qua mạng sau đó đến lấy đồ trực tiếp	9		
By telephone for delivery	Mua qua điện thoại và đồ được giao đến tận nhà	10		

[all respondents]
[single mention grid table]
[list order: In order]
[statement list order: In order]
[programmer notes: pipe in according to Q2 or auto fill if only one response to Q2]
[validation:]

Q2A. And out of the same list, where do you buy the majority of your food?
Q2A. Trong số các địa điểm đó, anh/chị thường mua sắm phần lớn thực phẩm, đồ ăn ở đâu?

Statements English	Statements Vietnamese	Value	Attribute	Termination	Logic
In store at a major grocery store chain (like Big C, VinMart, Coopmart)	Chuỗi siêu thị lớn (ví dụ BigC, VinMart, Coopmart,…)	1			If Q2 = 1
In store at a department store (like LotteMart in Lotte Department Store, Aeon)	Trung tâm thương mại (ví dụ LotteMart, Aeon)	2			If Q2 = 2
In independent branded food store	Cửa hàng thực phẩm có thương hiệu riêng (ví dụ An Nam Gourmet, Homefarm, v.v…)	3			If Q2 = 3
In special food store (eg: seafood store, imported fruit store)	Cửa hàng thực phẩm chuyên biệt (ví dụ cửa hàng hải sản Daohaisan, v.v…, cửa hàng hoa quả nhập khẩu Klever Fruit, v.v…)	4			If Q2 = 4
In store at a convenience store (like Circle K, 7 Eleven)	Cửa hàng tiện lợi (ví dụ Circle K, 7Eleven, …)	5			If Q2 = 5
In store at an independent traditional grocery store	Cửa hàng tạp hóa truyền thống	6			If Q2 = 6
In store at a local market	Chợ gần nơi sống	7			If Q2 = 7
Online for home delivery	Mua qua mạng và đồ được giao đến tận nhà	8			If Q2 = 8
Online for pickup in store (or curbside)	Mua qua mạng sau đó đến lấy đồ trực tiếp	9			If Q2 = 9
By telephone for delivery	Mua qua điện thoại và đồ được giao đến tận nhà	10			If Q2 = 10

[all respondents]
[single mention]
[list order: In order]
[programmer notes:]
[validation:]

Q3. How often does your household buy food or seafood …
Q3. Tần suất anh/chị mua thực phẩm, hải sản là…

Label English	Label Vietnamese	Value	Attribute	Termination
… Every day	… Hàng ngày	1		
… Several times per week	… Vài lần mỗi tuần	2		
… Once a week	… Một lần mỗi tuần	3		
… Less than once a week	… Ít hơn một lần mỗi tuần	4		

[all respondents]
[single mention grid table]
[list order: In order]
[statement list order: In order]
[programmer notes:]
[validation:]

Q4. How often do you buy the following foods for your household:

Q4. Tần suất anh/chị mua các loại thực phẩm dưới đây ra sao?

		List English	Every day	Several times a week	Once a week	A couple of times per month	Once a month	Less than once a month	Very rarely	Never
		List Vietnamese	Hàng ngày	Vài lần một tuần	Một lần một tuần	Vài lần một tháng	Một lần một tháng	Ít hơn một lần một tháng	Rất hiếm khi	Không bao giờ
Statements English	**Statements Vietnamese**	**Value**	1	2	3	4	5	6	7	8
Beef	Thịt bò	Q4-A								
Pork	Thịt lợn	Q4-B								
Chicken or other poultry products (eggs, etc.)	Gia cầm hoặc thực phẩm từ gia cầm (ví dụ gà, vịt, ngan, trứng, v.v…)	Q4-C								
Fish	Cá	Q4-D								

Seafood	Hải sản (Ngoại trừ cá, ví dụ tôm, cua, mực…)	Q4-E								
Bread or baked treats (such as cookies, donuts, etc.)	Bánh mì, bánh ngọt	Q4-F								
Grains (rice, cereal, etc.)	Hạt (gạo, ngũ cốc, lạc, v.v…)	Q4-G								
Vegetables	Rau củ	Q4-I								
Fruits	Hoa quả	Q4-J								
Flour	Bột mì	Q4-K								
Dairy milk	Sữa động vật	Q4-L								
Cheese and other dairy products	Phomai và các sản phẩm từ sữa khác (ví dụ Váng sữa, sữa chua…)	Q4-M								

[all respondents]
[single mention grid table]
[list order: In order]
[statement list order: In order]
[programmer notes:]
[validation:]

Q5. Please indicate how you agree or disagree with the following statements …

Q5. Anh/chị đồng ý hoặc không đồng ý như thế nào với các nhận định sau

		List English	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree
		List Vietnamese	Hoàn toàn đồng ý	Tương đối đồng ý	Trung lập	Tương đối không đồng ý	Hoàn toàn không đồng ý
Statements English	**Statements Vietnamese**	**Value**	1	2	3	4	5

I like trying out new foods, recipes, flavours and ingredients.	Tôi thích thử đồ ăn mới, công thức nấu ăn mới, sử dụng hương vị và nguyên liệu mới	Q5-A					
I regularly read the lists of ingredients of the food I buy.	Tôi thường xuyên xem kỹ thành phần của thực phẩm mình mua	Q5-B					
I am very health conscious and think carefully about what I eat.	Tôi rất quan tâm tới sức khỏe và tôi suy nghĩ kỹ trước khi mua đồ ăn của mình	Q5-C					
I enjoy cooking.	Tôi thích nấu nướng	Q5-D					
I pay attention to foods coming from abroad.	Tôi quan tâm tới các loại thực phẩm có nguồn gốc từ nước ngoài	Q5-E					
I prefer to stay with the food that is made or comes from Vietnam.	Tôi thích ăn đồ ăn thuần Việt hơn	Q5-F					
I think about environmental sustainability when purchasing food.	Khi mua thực phẩm, đồ ăn, tôi thường nghĩ đến việc bảo vệ môi trường	Q5-G					

Part 3: Shopping habits for international food
Phần 3: Thói quen mua thực phẩm, đồ ăn nước ngoài

[questions to include in this section: Q6 to Q11]
[programmer notes:]

Shopping Habits For International Food

The following section will focus on your international food shopping habits.
Phần khảo sát tiếp theo sẽ tìm hiểu về thói quen mua thực phẩm, đồ ăn từ nước ngoài của anh/chị

[all respondents]
[single mention]
[list order: In order]
[programmer notes:]
[validation:]

Q6. Out of the total amount your household spends on food in a year, about how much of it, in percentage, is spent on food and seafood imported from other countries?

Q6. Trong số tiền gia đình anh/chị chi cho thực phẩm, đồ ăn một năm, khoảng bao nhiêu phần trăm là anh/chị chi cho thực phẩm và hải sản được nhập khẩu từ nước ngoài?

English	Vietnamese	Value	Attribute	Termination
0%	0%	1		Move to part 4
1% to less than 5%	Từ 1% đến dưới 5%	2		
5% to less than 10%	Từ 5% đến dưới 10%	3		
10% to less than 15%	Từ 10% đến dưới 15%	4		
15% to less than 20%	Từ 15% đến dưới 20%	5		
20% to less than 30%	Từ 20% đến dưới 30%	6		
30% to less than 40%	Từ 30% đến dưới 40%	7		
40% to less than 50%	Từ 40% đến dưới 50%	8		
50% to less than 75%	Từ 50% đến dưới 75%	9		
75% and above	Từ 75% trở lên	10		

[all respondents]
[single mention]
[list order: In order]
[programmer notes:]
[validation:]

Q7. Thinking of the last 1 year, did you purchase food or seafood coming from …

Select all that apply

Q7. Trong 1 năm qua, anh/chị có mua thực phẩm, đồ ăn đến từ quốc gia nào sau đây không? Hãy chọn tất cả các phương án trả lời phù hợp

English	Vietnamese	Value	Attribute	Termination
Australia	Úc	1		
Canada	Canada	2		
China	Trung Quốc	3		
France	Pháp	4		
Italy	Ý	5		
Japan	Nhật Bản	6		
New Zealand	New Zealand	7		
United States of America	Mỹ	8		
Brazil	Brazil	9		
Argentina	Argentina	10		
Thailand	Thái Lan	11		
South Korea	Hàn Quốc	12		
Other countries	Các nước khác	13		
None	Không mua đồ từ nước ngoài	14	move to part 4	
Don't know / Don't remember	Không nhớ / Không biết	15	move to part 4	

[all respondents]
[single mention]
[list order: In order]
[programmer notes:]
[validation:]

Q8. Thinking of the last 1 year, how often have you purchased food or seafood from other countries?

Q8. Trong 1 năm qua, tần suất mua các thực phẩm, đồ ăn được nhập khẩu từ nước ngoài của anh/chị là gì?

Label English	Label Vietnamese	Value	Attribute	Termination
Every week or more	Hàng tuần hoặc thường xuyên hơn	1		
Once or twice a month	Một hoặc hai lần mỗi tháng	2		
Less than once a month	Ít hơn một lần mỗi tháng	3		
Very rarely	Rất hiếm khi	4		
Don't Know	Không nhớ/ không biết	5	move to part 4	

[if Q7-B=2]
[single mention]
[list order: In order]
[programmer notes:]
[validation:]

Q9. In the last 1 year, approximately how often do you recall buying food and seafood made in Canada?

Q9. Trong vòng 1 năm qua, anh/chị có thường xuyên mua thực phẩm, đồ ăn có xuất xứ từ Canada hay không?

Label English	Label Vietnamese	Value	Attribute	Termination
Once or twice a month	Một hoặc hai lần mỗi tháng	1		
Less than once a month	Ít hơn một lần mỗi tháng	2		
A few times per year	Vài lần mỗi năm	3		
Once a year or less	Một lần mỗi năm hoặc ít hơn	4		
Don’t know	Không nhớ / không biết	5	move to Q11	

[if Q7-B=2]
[single mention]
[list order: In order]
[programmer notes:]
[validation:]

Q10. From the following list, please indicate which Canadian products you have purchased in Vietnam in the last 1 year. (Check all that apply)

Q10. Trong vòng 1 năm qua, anh/chị có mua các sản phẩm đến từ Canada dưới đây khi mua sắm tại Việt Nam hay không? Hãy chọn tất cả các phương án trả lời phù hợp.

English Statement	Vietnamese Statement	Value	Attribute	Termination
Maple syrup	Si-rô cây phong	1		
Bread, cereals	Bánh mì, ngũ cốc	2		
Seafood	Hải sản	3		
Beef, pork, other meat	Thịt bò, thịt lợn, hoặc các loại thịt khác	4		
Wine, beer and other alcohol	Rượu vang, bia, hoặc đồ uống có cồn	5		
Honey, jam	Mật ong, mứt	6		

Flour	Bột mì	7		
Condiments, seasonings	Nước sốt và gia vị	8		
Fruits and vegetables	Hoa quả và rau củ	9		
Cheese, yogurt, dairy	Phomai, sữa chua, sữa, các sản phẩm từ sữa	10		
Other, please specify:______	Khác, vui lòng ghi rõ: ______	11		

[all respondents]
[single mention grid table]
[list order: In order]
[statement list order: Rotated]
[programmer notes:]
[validation:]

Q11. Please indicate how important each of these following criteria are when buying food or seafood products from foreign countries?

Q11. Đối với anh/chị, mức độ quan trọng của các tiêu chí sau khi mua thực phẩm hoặc đồ hải sản từ nước ngoài như thế nào?

		List English	Not important at all	Somewhat not important	Neutral	Somewhat important	Extremely important
		List Vietnamese	Hoàn toàn không quan trọng	Không quan trọng lắm	Bình thường	Hơi quan trọng	Cực kỳ quan trọng
Statements English	**Statements Vietnamese**	**Value**	1	2	3	4	5
High food safety standards	Có tiêu chuẩn vệ sinh an toàn thực phẩm cao	Q11-A					
Sustainability	Bảo vệ môi trường	Q11-B					
New technologies and innovative processes	Công nghệ mới và quy trình sáng tạo	Q11-C					
High quality	Chất lượng cao	Q11-D					
Healthy and wholesome	Lành mạnh và tốt cho sức khỏe	Q11-E					
Diverse range of food and seafood products	Nhiều loại thực phẩm và hải sản đa dạng	Q11-F					

Part 4: General opinion about other countries
Phần 4: Quan điểm về các quốc gia nước ngoài

[questions to include in this section: Q12 to Q19]
[programmer notes:]

General Opinion About Other Countries

The following section will focus on your general opinion about other countries.
Phần khảo sát tiếp theo sẽ tìm hiểu về quan điểm của anh/chị về các quốc gia nước ngoài

[all respondents]
[single mention]
[list order: In order]
[programmer notes:]
[validation:]

Q12. Have you or someone in your household ever been abroad (for work, education or vacation)?
Q12. Anh/chị hoặc có ai trong gia đình của anh/chị đã từng đến nước ngoài để đi làm, đi học hoặc du lịch hay chưa?

Label English	Label Vietnamese	Value	Attribute	Termination
Yes	Có	1		
No	Không	2		

[all respondents]
[single mention grid table]
[list order: In order]
[statement list order: In order]
[programmer notes:]
[validation:]

Q13. To what extent are you interested or not in foreign countries when it comes to …
Q13. Mức độ quan tâm của anh/chị đến những khía cạnh dưới đây của các quốc gia nước ngoài là như thế nào?

		List English	Not interested at all	Somewhat not interested	Neutral	Somewhat interested	Extremely interested
		List Vietnamese	Không quan tâm chút nào	Không quan tâm lắm	Bình thường	Hơi quan tâm	Đặc biệt quan tâm
Statements English	**Statements Vietnamese**	**Value**	1	2	3	4	5
Food and cuisine	Ẩm thực và đồ ăn	Q10-A					
History and culture	Lịch sử và văn hóa	Q10-B					

Nature and wildlife	Thiên nhiên và cuộc sống hoang dã	Q10-C					
Travel	Du lịch	Q10-D					
Movies/music/artists	Phim ảnh / âm nhạc / nghệ sĩ	Q10-E					
Fashion	Thời trang	Q10-F					
Education (in other words: studying abroad)	Giáo dục (ví dụ Du học ở nước ngoài)	Q10-G					

[all respondents]
[open-end]
[programmer notes:]
[validation:]

Q14. In general, when you think of Canada, what is the first thing that comes to mind?

Q14. Khi nhắc đến Canada nói chung, điều đầu tiên anh/chị nghĩ đến là gì?

Label English	**Label Vietnamese**	**Value**	**Attribute**	**Termination**
Please specify	[Câu trả lời của ĐV (PVV: Anh/chị vui lòng kể cụ thể…)]	96	O	
(do not read) I prefer not to answer	[ĐV từ chối trả lời]	99		

[all respondents]
[open-end]
[programmer notes: rotate Q15 to Q18]
[validation:]

Q15. When it comes to food, what is the first thing that comes to your mind when you think of Canada?

Q15. Khi nhắc đến Canada, anh/chị nghĩ đến đồ ăn gì đầu tiên?

Label English	**Label Vietnamese**	**Value**	**Attribute**	**Termination**
Please specify	[Câu trả lời của ĐV (PVV: Anh/chị vui lòng nêu cụ thể…)]	96	O	
(do not read) I prefer not to answer	[ĐV từ chối trả lời]	99		

[all respondents]
[open-end]
[programmer notes:]
[validation:]

Q16. When it comes to food, what is the first thing that comes to your mind when you think of Australia?

Q16. Khi nhắc đến nước Úc, anh/chị nghĩ đến đồ ăn gì đầu tiên?

Label English	Label Vietnamese	Value	Attribute	Termination
Please specify	[Câu trả lời của ĐV (PVV: Anh/chị vui lòng nêu cụ thể…)]	96	O	
(do not read) I prefer not to answer	[ĐV từ chối trả lời]	99		

[all respondents]
[open-end]
[programmer notes:]
[validation:]

Q17. When it comes to food, what is the first thing that comes to your mind when you think of New Zealand?

Q17. Khi nhắc đến New Zealand, anh/chị nghĩ đến đồ ăn gì đầu tiên?

Label English	Label Vietnamese	Value	Attribute	Termination
Please specify	[Câu trả lời của ĐV (PVV: Anh/chị vui lòng nêu cụ thể…)]	96	O	
(do not read) I prefer not to answer	[ĐV từ chối trả lời]	99		

[all respondents]
[open-end]
[programmer notes:]
[validation:]

Q18. When it comes to food, what is the first thing that comes to your mind when you think of the United States?

Q18. Khi nhắc đến Mỹ, anh/chị nghĩ đến đồ ăn gì đầu tiên?

Label English	Label Vietnamese	Value	Attribute	Termination
Please specify	[Câu trả lời của ĐV (PVV: Anh/chị vui lòng nêu cụ thể…)]	96	O	
(do not read) I prefer not to answer	[ĐV từ chối trả lời]	99		

[all respondents]
[single mention]
[list order: In order]
[programmer notes:]
[validation:]

Q19. Do you recall ever seeing food products with a red maple leaf in a store or online?

Q19. Anh/chị đã từng nhìn thấy đồ ăn, đồ uống nào có hình ảnh lá phong đỏ khi đi mua sắm tại cửa hàng hoặc trên mạng hay chưa?

Label English	Label Vietnamese	Value	Attribute	Termination
Yes	Đã từng nhìn thấy	1		
No	Chưa từng nhìn thấy	2		
Don’t know	Tôi không biết / không nhớ	3		

[all respondents]
[single mention]
[list order: In order]
[programmer notes:]
[validation:]

Q20. Do you recall ever seeing food products in a store or online that specified that it was from Canada?
Q20. Anh/chị đã từng nhìn thấy đồ ăn, đồ uống nào mà được ghi rõ hoặc thể hiện rõ rằng sản phẩm đó đến từ Canada, khi mua đồ tại cửa hàng hoặc trên mạng hay chưa?

Label English	Label Vietnamese	Value	Attribute	Termination
Yes	Đã từng nhìn thấy	1		
No	Chưa từng nhìn thấy	2		
Don’t know	Tôi không biết / không nhớ	3		

[all respondents]
[single mention]
[list order: In order]
[programmer notes:]
[validation:]
Q21. Do you recall ever seeing an ad, poster or product with the tagline ‘United Tastes of America’?
Q21. Anh/chị đã từng nhìn thấy quảng cáo, áp phích hoặc sản phẩm có dòng chữ “United Tastes of America – Mỹ vị Hoa Kỳ” hay chưa?

Label English	Label Vietnamese	Value	Attribute	Termination
Yes	Đã từng nhìn thấy	1		
No	Chưa từng nhìn thấy	2		
Don’t know	Tôi không biết / không nhớ	3		

Part 5: General opinion about foreign products
Phần 5: Quan điểm về các sản phẩm có xuất xứ từ nước ngoài
[questions to include in this section: Q12 to -Q19]
[programmer notes:]

Opinions On Buying Foreign Products
The following section will focus on your foreign products buying habits.
Phần khảo sát tiếp theo sẽ tìm hiểu về thói quen mua các sản phẩm có xuất xứ từ nước ngoài của anh/chị.

[all respondents]
[single mention grid table]

[list order: In order]
[statement list order: In order]
[programmer notes:]
[validation:]

Q22. To what extent would you say you are interested in buying food products from the following countries in the future:

Q22. Trong tương lai, mức độ quan tâm của anh/chị đối với việc mua thực phẩm có xuất xứ từ các nước sau như thế nào?

		List English	Not interested at all	Somewhat not interested	Neutral	Somewhat interested	Extremely interested
		List Vietnamese	Không quan tâm chút nào	Không quan tâm lắm	Bình thường	Hơi quan tâm	Đặc biệt quan tâm
Statements English	**Statements Vietnamese**	**Value**	1	2	3	4	5
Australia	Úc	Q17-A					
Canada	Canada	Q17-B					
New Zealand	New Zealand	Q17-C					
United States of America	Mỹ	Q17-D					

[all respondents]
[single mention grid table]
[list order: In order]
[STATEMENT list order: In order]
[programmer notes:]
[validation:]

Q23. When it comes to food or seafood products, how would you rate Canada compared to other foreign countries who sell food and seafood in Vietnam?
Q23. Anh/chị đánh giá thực phẩm, hải sản Canada khác gì so với thực phẩm, hải sản của các quốc gia khác được bán tại Việt Nam?

		List Englsih	Better than other countries	Similar or same than other countries	Worse than other countries
		List Vietnamese	Tốt hơn các quốc gia khác	Giống các quốc gia khác	Tệ hơn các quốc gia khác
Statements		**Value**	1	2	3
High food safety standards	Có tiêu chuẩn vệ sinh an toàn thực phẩm cao	Q22-A			
Sustainability	Bảo vệ môi trường	Q22-B			
New technologies and innovative processes	Công nghệ mới và quy trình sáng tạo	Q22-C			
High quality	Chất lượng cao	Q22-D			
Healthy and wholesome food	Lành mạnh và tốt cho sức khỏe	Q22-E			
Diverse range of food and seafood products	Nhiều loại thực phẩm và hải sản đa dạng	Q22-F			

[all respondents]
[open ended – single answers]
[list order: In order]
[programmer notes:]
[validation: Text only]

Q24A. 'Which specific online stores would you visit to purchase Canadian food?'
Please specify the names of online stores (for example, buy from stores on Shopee, Lazada, Tiki, Facebook, Zalo or on websites of local stores, v.v…)

Q24A. Nếu như anh/chị muốn mua thực phẩm, đồ ăn của Canada, anh/chị sẽ mua tại cửa hàng online nào?
Vui lòng ghi cụ thể cửa hàng trên các kênh bán hàng online (ví dụ mua hàng tại các cửa hàng trên Shopee, Lazada, Tiki, Facebook, Zalo hoặc tại website của các cửa hàng, v.v…)

Label English	**Label Vietnamese**	**Value**	**Attribute**	**Termination**
Online stores:_________	Tên cửa hàng online:_______	96	O	

[all respondents]
[open ended – single answers]
[list order: In order]
[programmer notes:]
[validation: Text only]

Q24B. 'Which specific in-person stores would you visit to purchase Canadian food?'
Please specify the names of stores (for example, grocery, department or convenience store like Vinmart, Lottemart, Coopmart, Aeon, L'splace, v.v…)

Q24B. Nếu như anh/chị muốn mua thực phẩm, đồ ăn của Canada, anh/chị sẽ trực tiếp mua tại cửa hàng nào?
Vui lòng ghi cụ thể cửa hàng bán trực tiếp (ví dụ Vinmart, Lottemart, Coopmart, AEON, L'splace, v.v…)

Label English	Label Vietnamese	Value	Attribute	Termination
In-person stores:________	Tên cửa hàng bán trực tiếp:_______	96	O	

Part 6: Source of information
Phần 6: Về nguồn thông tin

[questions to include in this section: Q12 to Q19]
[programmer notes:]

Source of information

The following section will focus on your information and media consumption.
Phần khảo sát tiếp theo sẽ tìm hiểu về cách anh/chị tìm kiếm, sử dụng các thông tin truyền thông liên quan đến thực phẩm, đồ ăn.

[all respondents]
[single mention]
[list order: In order]
[programmer notes:]
[validation:]

Q25. When it comes to cooking and food, where do you turn to for inspiration and/or to look for information of food and seafood? Check all that apply.

Q25. Khi nấu đồ ăn và hải sản, anh/chị thường tìm kiếm nguồn cảm hứng, thông tin từ nguồn nào sau đây? Hãy chọn tất cả các phương án trả lời phù hợp.

Statements English	Statements Vietnamese	Value	Attribute	Termination
Friends or family	Gia đình hoặc bạn bè	1		
Cooking shows on television	Chương trình nấu ăn trên TV	2		
Lifestyle magazines who talk about food	Tạp chí về lối sống, ẩm thực	3		
Cookbooks you have at home	Sách hướng dẫn nấu ăn	4		
Google or other search engine	Google hoặc các công cụ tìm kiếm khác	5		
YouTube	YouTube	6		
Zalo	Zalo	7		
Vietnam news outlets (physical newspapers or online)	Các kênh tin tức, báo (báo giấy hoặconline) của Việt Nam	8		
International news outlets (physical newspapers or online)	Các kênh tin tức, báo (báo giấy hoặc online) của nước ngoài	9		
Facebook	Facebook	10		
Pinterest	Pinterest	11		
Instagram	Instagram	12		
None of the above	Không nguồn nào trong số trên	13		

[all respondents]
[single mention]
[list order: In order]
[programmer notes:]
[validation:]

Q26. And have you ever bought a food or seafood product imported into Vietnam after seeing/reading/hearing something about it on… (check all that apply)
Q26. Anh/chị đã bao giờ mua thực phẩm nhập khẩu hoặc hải sản nhập khẩu từ nước ngoài sau khi nhìn/nghe thấy/đọc được được thông tin về sản phẩm đó từ… (Hãy chọn tất cả các phương án trả lời phù hợp)

Statements English	Statements Vietnamese	Value	Attribute	Termination
Friends or family	Gia đình hoặc bạn bè	1		
Cooking shows on television	Chương trình nấu ăn trên TV	2		
Lifestyle magazines who talk about food	Tạp chí về lối sống, ăn uống	3		
Cookbooks you have at home	Sách hướng dẫn nấu ăn	4		
Google or other search engine	Google hoặc các công cụ tìm kiếm khác	5		
YouTube	Youtube	6		
Zalo	Zalo	7		
Vietnam news outlets (physical newspapers or online)	Các kênh tin tức, báo (báo giấy hoặc online) của Việt Nam	8		
International news outlets (physical newspapers or online)	Các kênh tin tức, báo (báo giấy hoặc online) của nước ngoài	9		
Facebook	Facebook	10		
Pinterest	Pinterest	11		
Instagram	Instagram	12		
None of the above	Không nguồn nào trong số trên	13		

Sociodemographic questions
Phần câu hỏi nhân khẩu học
[questions to include in this section:]
[programmer notes:]

Qsctdemo
The following questions are for statistical purposes only.
Phần khảo sát tiếp theo sẽ hỏi một số câu hỏi về thông tin của anh/chị. Các thông tin thu thập chỉ được phục vụ cho mục đích thống kê.

DM1. Please indicate your gender:
To which gender do you most associate yourself.

DM1. Giới tính của anh/chị là:

Label English	Label Vietnamese	Single Code
Male	Nam	1
Female	Nữ	2
I prefer not to answer	Từ chối trả lời	99

[all respondents]
[single mention]
[list order: In order]
[programmer notes:]
[validation:]

DM2. What is your current employment status?
DM2. Tình trạng việc làm hiện tại của anh/chị là?

Label English	Label Vietnamese	Value	Attribute	Termination
Working full time	Làm việc toàn thời gian	1		
Working part time	Làm việc bán thời gian	2		
Self-employed / freelance work	Tự kinh doanh / Freelance	3		
Student	Học sinh – sinh viên	4		
Homemaker	Nội trợ	5		
Unemployed	Thất nghiệp	6		
Retired	Nghỉ hưu	7		
I prefer not to answer	Từ chối trả lời	8		

[all respondents]
[single mention]
[list order: In order]
[programmer notes:]
[validation:]

DM3. Among the following categories, which one best reflects the total average monthly income, after taxes, of all the members of your household in 2021?
DM3. Thu nhập sau thuế trung bình mỗi tháng của tất cả các thành viên trong gia đình anh/chị trong năm 2021 là bao nhiêu?

Label English	Label Vietnamese	Value	Attribute	Termination
Less than 3,000,000 vnd	Ít hơn 3,000,000 vnd	1		
3,000.001 to 5,000,000 vnd	Từ 3,000.001 đến 5,000,000 vnd	2		
5,000.001 to 7.500,000 vnd	Từ 5,000.001 đến 7.500,000 vnd	3		
7.500.001 to10,000,000 vnd	Từ 7.500.001 đến 10,000,000 vnd	4		
10,000.001 to 15,000,000 vnd	Từ 10,000.001 đến 15,000,000 vnd	5		
15,000.001 to 20,000,000 vnd	Từ 15,000.001 đến 20,000,000 vnd	6		
20,000.001 to 25,000,000 vnd	Từ 20,000.001 đến 25,000,000 vnd	7		
25,000.001 to 30,000,000 vnd	Từ 25,000.001 đến 30,000,000 vnd	8		
30,000.001 to 35,000,000 vnd	Từ 30,000.001 đến 35,000,000 vnd	9		
35,000.001 to 40,000,000 vnd	Từ 35,000.001 đến 40,000,000 vnd	10		
vnd 40,000,001 to 50,000,000	Từ 40,000.001 đến 50,000,000 vnd	11		
vnd 50,000,001 to 75,000,000	Từ 50,000.001 đến 75,000,000 vnd	12		
vnd 75,000,001 to 100,000,000	Từ 75,000.001 đến 100,000,000 vnd	13		
vnd 100,000,001 and above	Trên 100,000,000 vnd	14		

[all respondents]
[single mention]
[list order: In order]
[programmer notes:]
[validation:]

DM4. What is the highest level of education that you have completed (with an obtained degree, diploma and/or certificate)?
DM4. Trình độ học vấn cao nhất của anh/chị là gì?

Label English	Label Vietnamese	Value	Attribute	Termination
No formal education	Không được đi học	1		
Some primary education, but not complete	Chưa hoàn thành bậc tiểu học	2		
Primary education complete	Học hết tiểu học	3		
Some middle school education, but not complete	Chưa hoàn thành bậc trung học cơ sở	4		
Middle school education complete	Học hết trung học cơ sở	5		
Some high school education, but not complete	Chưa hoàn thành bậc trung học phổ thông	6		
High school education complete	Tốt nghiệp trung học phổ thông	7		
Vocational training	Tốt nghiệp trường nghề	8		
Some college or university, but not complete	Chưa hoàn thành bậc cao đẳng hoặc đại học	9		
College or University complete	Tốt nghiệp cao đẳng hoặc đại học	10		
Beyond college or university	Tốt nghiệp bậc sau đại học	11		

[questions to include in this section:]
[programmer notes:]

Conclusion

This study was conducted on behalf of Agriculture and Agri-Food Canada. Thank you for your time and rest assured all your answers will remain confidential.

If you have any questions, feel free to contact us through our representatives at vietnam@indochinaresearch.com

Khảo sát này được thực hiện thay mặt cho bộ Nông nghiệp Canada. Cảm ơn anh/chị đã dành thời gian và hãy yên tâm rằng tất cả các câu trả lời của anh/chị sẽ được bảo mật.

Nếu anh/chị có câu hỏi nào khác, liên hệ với chúng tôi tại vietnam@indochinaresearch.com