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2022 Vietnam Consumer Perceptions of Canadian Food and Seafood Products

Executive Summary

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.

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)

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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:

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