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2023-24 Consumer Perceptions of Canadian Agriculture, Foods and Seafood Products in Vietnam, Japan, the Philippines, and South Korea

Executive Summary

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This public opinion research report presents the results of an online survey conducted by Ipsos Limited Partnership on behalf of Agriculture and Agri-Food Canada (AAFC). The research study was conducted with 5,500 individuals across four countries: Japan (n=1,750), Vietnam (n=1,750), the Philippines (n=1,000) and South Korea (n=1,000) between February 22 and March 11, 2024.

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Executive summary

Introduction

Ipsos was commissioned by Agriculture and Agri-Food Canada (AAFC) to conduct public opinion research on attitudes and behaviours as it relates to Canadian food products in select international markets.

Background

In 2006, AAFC launched Canada Brand to raise the profile of Canadian food in international markets and increase awareness of the Canadian agriculture industry specifically, as well as to help differentiate Canadian food products from the competition.

AAFC refreshed its Canada Brand tools to better optimize them for digital platforms and sought to expand Canada's presence in Vietnam and Japan in particular. As part of this effort, targeted Canada Brand pilots were launched in 2023-24 in these markets which featured digital and e-commerce marketing consumer campaigns.

To help evaluate the effectiveness of the campaigns, AAFC commissioned Ipsos to conduct this study in Vietnam, Japan, Philippines, and South Korea. This survey focuses on better understanding consumer behaviours, perceptions of Canadian products and evolving market demand. The findings of the research will help to inform future market development activities and supports the AgriCommunication Stream 2 program objective to share information and engage with the agriculture and agri-food sector about the evolving expectations and behaviors of foreign consumers.

Research objectives

The findings from this research seek to build on the previous surveys conducted among consumers in Japan in 2021-22 and Vietnam in 2022-23. The survey seeks to measure consumer behaviours, perceptions of Canadian products, processes, and evolving market demands, and where possible to track results compared to the first wave of the survey. The survey conducted among consumers in the Philippines and South Korea will be used to establish a baseline from which to measure against in the future.

Specific objectives of the research include, but are not limited to, assessing:

- Food purchasing behaviours
- Media consumption habits
- Awareness of Canadian agriculture, food, and seafood products
- Purchase frequency of Canadian food and seafood products
- Demand for Canadian food and seafood products
- Perceptions of Canadian agriculture products and processes; and
- Importance of sustainable agriculture initiatives.

Methodology

The public opinion research (POR) was conducted through a quantitative survey executed through online interviews among a national sample of general population adult consumers (20 years and older) in Vietnam, Japan, the Philippines, and South Korea. A total of n=1,750 surveys were completed in each Vietnam and Japan, and n=1,000 in the Philippines and South Korea. The sample was sourced from online panel sources in the respective markets and quotas and weighting were applied to ensure the final sample reflects the general population by key demographic factors.

It is important to note that in Vietnam and the Philippines, the sample that can be recruited is more urban, more educated, and/or more affluent than the general population. Therefore, the results should be viewed as reflecting the views of the more "connected" segment of the population. In South Korea, the sample consists of those with primary education or higher.

Fieldwork was conducted from February 22 through to March 11, 2024. Average survey length varied by country: in Japan, 5 minutes; in Vietnam, 10 minutes; in South Korea, 5 minutes; in the Philippines, 8 minutes.

Quotas and weighting were employed by gender, age, and region to reflect the composition of the general population in each country, based on statistics collected by official agencies in each country. Results were accurate to within plus or minus 2.9 percentage points in Japan and in Vietnam total sample and 3.8 percentage points in South Korea and the Philippines, compared to what the results would have been had every adult consumer in each country been polled.

Notes to readers

- All results in the report are expressed as a percentage, unless otherwise noted.
- Throughout the report, percentages may not always add to 100 due to rounding.
- When reporting sub-group variations, only differences that are significant at the 95% confidence level, indicative of a pattern and pertaining to a sub-group sample size of more than n=30 is discussed.
- For open-ended measures, results have been coded into thematic category and expressed as individual codes that align most closely to respondents’ answers and broader themes (NETs) for comparison purposes.

Expenditure

The contract value for the POR survey was $99,632.10 (including HST).

Key findings

Purchase of food products from Canada and other select markets

Consumers in Vietnam are by-far most likely to have purchased Canadian food recently, followed by the Philippines and South Korea, while those in Japan are much less likely. Compared to food imported from other countries, products from the US are most established across all markets, followed by those from

Australia, while results are consistent for Canada and New Zealand and lower for France. While penetration of Canadian food is high in Vietnam, room for improvement exists in terms of increasing exposure particularly in Japan and South Korea.

- Three quarters of consumers in Vietnam report having purchased Canadian food products in past six months (74%), followed by just over half of consumers in South Korea (56%) and the Philippines (55%), and one third in Japan (32%). Consumers in Vietnam are also most likely to have purchased Canadian food products on a more frequent basis with more than half doing so at least once a month (55%), followed by one third in the Philippines (34%), one quarter in South Korea (25%) and 15% in Japan.
- In comparison to food imported from other countries, consumers in all markets are most likely to have reported having purchased products from the US, followed by Australia, while the purchase of food from Canada is generally consistent with New Zealand and higher than France.
- Consumers in Vietnam are most likely to have purchased food products from all countries and to have done so on a more frequent basis compared to those in other markets, indicating a greater openness to imported food.

Meat, fish and seafood, and maple syrup and honey are the most popular Canadian food products across all markets, with some exceptions. Consumers in the Philippines are most likely to have purchased confectionary and snacks and natural health products which are also among the most popular in Vietnam along with fruits and vegetables. Beyond the most prominent categories, there is a significant opportunity to increase awareness and purchase of a wider range of Canadian foods.

- Among consumers who have bought Canadian food products in the past six months, beef, pork, and other meat are the most commonly purchased products across all countries except for the Philippines (ranging from 91% in Vietnam to 79% in Japan). Fish and seafood (88% in Vietnam, 76% in South Korea, 75% in the Philippines and 58% in Japan) and maple syrup and honey (88% in the Philippines, 85% in Vietnam, 75% in South Korea and 63% in Japan) are also among the most frequently purchased products in most markets.
- Confectionary and snacks and natural health products have the highest penetration of any Canadian food product in the Philippines (95% and 90% respectively) and are among the most frequently purchased in Vietnam (89% each category), along with fruits and vegetables (90%).
- Maple syrup and honey are purchased on a less frequent basis compared to other leading categories. Nearly half of the consumers in the Philippines (52%) or Vietnam (48%) have purchased maple syrup or honey from Canada at least once a month, while considerably fewer consumers in South Korea (22%) or Japan (17%) have done so.
- In both Vietnam and the Philippines, consumers appear more receptive to Canadian food products in general than those in South Korea or Japan and are more likely to purchase products from a broader range of food categories.

Online shopping in Japan and Vietnam: recall and purchase of Canadian food products

Consistent with the purchasing of Canadian food in general, awareness and purchase of products online is considerably higher in Vietnam than in Japan. Converting awareness into purchase has been most successful for meat, fish, and seafood, and to a lesser extent maple syrup, and is lowest for alcoholic beverages and natural health products. Increasing the visibility of Canadian food products online is of particular importance in Japan, though both countries could benefit from greater exposure.

More than seven in ten (72%) Vietnamese consumers who have shopped at a Canada Brand food retailer in the past six months recall having seen Canadian food products online compared to roughly four in ten (44%) Japanese consumers. In terms of specific types of Canadian food products, more than half of Vietnamese consumers recall all types of Canadian food products while shopping online, while in Japan awareness is mainly concentrated on maple syrup and honey, beef, pork and other meat, fish, and seafood.

- In Vietnam, recall is highest for beef, pork and other meat (67%), followed by natural health products (62%), wine, beer and other alcoholic beverages (59%), fish and seafood (56%), fruits and vegetables (56%), confectionary and snacks (54%), and maple syrup and honey (51%).
- Consumers in Japan are most likely to recall maple syrup and honey (69%), followed by beef, pork and other meats (52%) and fish and seafood (52%), while considerably fewer have seen wine, beer and other alcoholic beverages (37%), confectionary and snacks (25%), fruits and vegetables (16%), or natural health products (14%).

Among those aware of each type of food, Vietnamese consumers are considerably more likely to have purchased the product compared to Japanese consumers, except for maple syrup and honey where results are roughly equivalent.

- In Vietnam, more than half (56%) of consumers who recall beef, pork and other meat purchased these products, followed by roughly half for fish and seafood (48%), fruit and vegetables (48%), natural health products (48%), wine, beer and other alcoholic beverages (47%), confectionary and snacks (45%), and maple syrup and honey (41%).
- In Japan, nearly half (45%) of consumers who recall maple syrup and honey purchased these products, followed by beef, pork, or other meat (33%), fish and seafood (31%), wine, beer and other alcoholic beverages (16%), confectionary and snacks (14%), fruit and vegetables (9%), and natural health products (6%).

When looking at how successful Canadian food products have been at converting awareness into purchase, a considerably higher proportion of Vietnamese consumers who recall each type of product report making a purchase compared to Japanese consumers.

- In Vietnam, converting visibility into purchase has been most successful for fruit and vegetables (86%), fish and seafood (85%), beef, pork and other meat (84%), and confectionary and snacks (83%), followed closely by maple syrup and honey (80%), wine, beer and other alcoholic beverages (80%), and natural health products (77%).
- In Japan, conversion rates are highest for maple syrup and honey (65%), beef, pork and other meat (64%) and fish and seafood (60%), followed by confectionary and snacks (56%), and fruit and vegetables (56%), while fewer of those who recall wine, beer and other alcoholic beverages (46%) or natural health products (43%) purchased these products.

Canadian product positioning

Top-of-mind associations of food with Canada are dominated by mentions of specific types of food products and consumers are most likely to think of maple syrup, meat, and fish and seafood, while those in the Philippines are also more likely to mention chocolate and sweets. “Made in Canada” labels are by far the most common way consumers know a product is from Canada, followed by the maple leaf symbol.

When thinking of food from Canada, consumers in all markets except Vietnam are most likely to mention maple syrup (Japan: 43%, South Korea: 27%, Philippines: 26%, Vietnam: 11%), followed by beef, pork and other meat (Japan: 16%, South Korea: 9%, Philippines: 13%, Vietnam: 20%), and fish and seafood (Japan: 13%, South Korea: 6%, Philippines: 3%, Vietnam: 15%). In Vietnam, beef, pork, and other meat are most commonly associated with Canada, followed by fish and seafood, maple syrup, and fruit. Notably, mentions of chocolate and sweets are higher among consumers in the Philippines than other markets.

Similarly, when asked to name types of foods they associate with Canada maple syrup and beef, pork and other meat are consistently among the top mentions across all markets.

- In Japan, maple syrup is most strongly associated with Canada (43%), followed by beef, pork, and other meat (31%), and fish and seafood (28%), while considerably fewer mention any other type of food.
- In Vietnam, consumers are most likely to mention beef, pork, and other meat (40%), followed by fish and seafood (30%), fruit (26%), confectionary and snacks (18%), and maple syrup (15%).
- In South Korea, associations are strongest with beef, pork, and other meat (43%), followed by maple syrup (38%), and fish and seafood (32%).
- In the Philippines, consumers are most likely to mention confectionary and snacks (41%), followed by maple syrup (36%), beef, pork and other meat (32%), processed foods (19%), wheat and other types of cereal (17%), and fruit (14%), while fish and seafood is notably much less commonly associated with Canada (11%) than in other markets.

Among those who have purchased a Canadian food product, by far the most common way consumers knew it was from Canada is because the product had a “Made in Canada” label (Japan: 73%, Vietnam: 79%, South Korea: 61%, Philippines: 79%), and to a lesser extent the maple leaf symbol (Japan: 38%, Vietnam: 51%, South Korea: 50%, Philippines: 45%). In Vietnam, roughly half of consumers also relied on other ways to identify Canadians food products including that it was promoted as Canadian in-store (53%) or online (47%), or familiarity with the brand name or producer (50%). In the Philippines, familiarity with the brand name or producer (41%) is also among the more common ways consumers identify Canadian products.

Satisfaction with Canadian food products is generally high across all markets, however consumers in Vietnam and the Philippines are much more likely to be “very satisfied”, while impressions are softer in Japan or South Korea. Canadian food products are most strongly associated with being “high-quality”, “safe”, “trustworthy”, and to a lesser extent “healthy” and “great tasting”, while impressions are generally weaker for being seen as “innovative” and “diverse”.

Among those who have purchased a Canadian food product in the past six months, satisfaction is highest in Vietnam (96% very/ somewhat satisfied) and the Philippines (94%), followed by Japan (80%) and South Korea (76%). Consumers in Vietnam and the Philippines are considerably more likely to be “very satisfied” with the product they purchased (73% and 49% respectively) compared to those in Japan (20%) or South Korea (14%) where most were “somewhat satisfied” (60% and 62% respectively).

The quality and to a lesser extent the taste of Canadian food products are consistently among the most common reasons consumers provided for their satisfaction with the product they purchased, however the primary reason varies by market.

- In Japan, consumers are by far most likely to mention the taste (44%), followed by affordability (25%), and quality (21%).
- In Vietnam and the Philippines, the quality of the product is mentioned most often (47% and 49% respectively), while other less common reasons include the taste (14% and 20%), that the product was healthy (20% and 8%), or general comments about being satisfied (12% and 18%).
- In South Korea, no one reason dominates, and consumers are most likely to mention the quality of the product (31%), followed by affordability (24%), fresh (17%), and the taste (16%).

Consumers in Vietnam and the Philippines have by far the most positive impressions of Canadian food products, while ratings are weaker in South Korea and Japan where consumers are more likely to express a neutral opinion or say they don’t know.

- In Japan, ratings of Canadian food products are strongest for “great tasting” (52%), followed by “trustworthy” (48%), “safe” (44%) and “high quality” (37%), while impressions are weakest for being “innovative” (13%), “sustainably-produced” (23%), and “expensive” (25%).
- In Vietnam, consumers are most likely to rate Canadian food products highly for being “high quality” (86%), “trustworthy” (85%), “safe” (85%), and “healthy” (84%), followed closely by “sustainably produced” (82%) and “great tasting” (81%). Ratings are comparatively weaker for being “expensive” (60%) and to a lesser extent “diverse” (77%), “fresh” (77%) and “innovative” (78%).
- In South Korea, Canadian food products are most strongly associated with being “trustworthy” (63%), “high quality” and “safe” (62% each), followed closely by “healthy” (60%) and “great tasting” (57%). Impressions are much weaker for being seen as “innovative” (24%), “expensive” (33%), “diverse” (40%), and to a lesser extent “sustainability-produced” (51%).
- In the Philippines, consumer impressions of Canadian food products closely mirror those observed in Vietnam, with ratings highest for “high quality” (88%), followed by “safe” (85%), “trustworthy” (84%), “great tasting” (83%) and “healthy” (79%). Ratings are comparatively weaker for being “expensive” (72%).

Interest in buying food products from Canada and other select markets

Interest in food products from Canada is by far the highest in the Philippines and Vietnam, followed by South Korea and Japan where interest is much softer and familiarity with Canadian food lower. In comparison to food imported from other countries, Canada is well-positioned, and interest is generally consistent with those from the US, Australia, and New Zealand, and higher than products from France.

Consumers are by far most likely to express interest in buying food products from Canada in the future in the Philippines (94% "very" or "somewhat interested") and Vietnam (88%), where more than half are "very interested" (53% and 55% respectively), followed by South Korea (66%) and Japan (49%), where most are "somewhat interested" (55% and 41% respectively) and a higher proportion say they don't know.

In comparison to food imported from other countries, interest in food products from Canada is generally consistent with those from the US, Australia, and New Zealand, while fewer express interest in products from France across all markets. Notably, consumers in Vietnam and the Philippines are more likely to be "very interested" in buying food products from Canada compared to other countries.

Broadly speaking, consumers in Japan and to a lesser extent South Korea are less interested in buying food products from all countries asked about in the survey and are somewhat more likely to be interested in products from Australia relative to other countries.

- In Japan, consumers are most likely to express interest in buying food products from Australia (53%), followed by Canada (49%), the US (48%), New Zealand (48%), and France (45%).
- In Vietnam, interest is highest for buying food products from Canada (88%), followed closely by the US (86%), and Australia (85%), while fewer express interest in food products from New Zealand (80%) or France (75%).
- In the Philippines, consumers are most likely to express interest in buying food products from Canada (94%), followed closely by the US (92%), Australia (92%), and New Zealand (92%), while fewer are interested in food products from France (86%).
- In South Korea, interest is highest for buying food products from Australia (70%), followed by Canada (66%), New Zealand (65%), and the US (64%), while fewer express interest in food products from France (48%).

Social media consumption habits

Virtually all consumers report using YouTube on a frequent basis across all markets, while Facebook is equally as popular in Vietnam and the Philippines. Social media and YouTube in particular, are among the most common sources of culinary inspiration and information which highlights the potential of these platforms for reaching and engaging consumers with Canadian food-related content.

When looking at reported use of social media platforms, consumer preferences vary by market and those in Vietnam and the Philippines are more likely to use all platforms compared to those in South Korea and Japan in particular.

- Nearly all consumers in Vietnam and the Philippines (97% for both) report using YouTube "once a week or more often", followed closely by those in South Korea (94%), while fewer use the platform at the same frequency in Japan (79%).
- Facebook is also among the most frequently used platforms in Vietnam and the Philippines (97% use "once a week or more often"), followed by South Korea (51%), while the platform is much less popular in Japan (27%).

- Instagram is used frequently by a strong majority of consumers in the Philippines (79% “once a week or more often”), Vietnam (71%), and South Korea (69%), while roughly half of consumers in Japan use it as often (46%).
- TikTok is particularly popular among consumers in Vietnam (85%) and the Philippines (76%), while considerably fewer use it as frequently in South Korea (33%) and Japan (24%).

YouTube, search engines like Google, family and friends, and Facebook are the most common sources for culinary inspiration and information about food and seafood across all markets. Notably, consumers in Japan are much less likely to use any of the sources explored in the survey.

- In Japan, cooking shows on television are the most common source of inspiration (38%), followed by YouTube (31%), Google or other search engines (31%), news outlets (24%), and friends and family (23%).
- In Vietnam, consumers are most likely to use YouTube for inspiration (69%), followed by Facebook (57%), Google or other search engines (52%), TikTok (50%), and friends and family (40%).
- In South Korea, YouTube is the most common source of inspiration (70%), followed by Google or other search engines (52%), friends and family (30%), Instagram (29%), and cooking shows on television (28%).
- In the Philippines, consumers are by far most likely to use YouTube for inspiration (88%), followed by Facebook (68%), friends and family (57%), Google or other search engines (55%), cooking shows on television (46%), and TikTok (45%).

In Japan and Vietnam, a strong majority of consumers have seen content about Canadian food in the past six months through at least one channel, of which YouTube (in both markets) and Facebook (in Vietnam) are the most prevalent.

In Japan, three quarters (76%) of those who use YouTube recall content about Canadian food in the past six months, while considerably fewer mention seeing anything on Instagram (32%). In Vietnam, two thirds (62%) of the consumers who use either YouTube or Facebook recall content about Canadian food, followed by TikTok (53%), while fewer mention Instagram (27%).

Political Neutrality Statement

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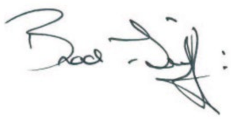

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