Agriculture and Agri-Food Canada | Agriculture et Agroalimentaire Canada

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

Final Report

Prepared for Agriculture and Agri-Food Canada (AAFC)

Supplier: Ipsos Limited Partnership
Contract Number: CW2338997

Contract Value: $99,632.10 (including HST)
Award Date: 2023-11-20
Delivery Date: May 27, 2024
Registration Number: POR 089-23

For more information on this report, please contact Agriculture and Agri-Food Canada at aafc.info.aac@agr.gc.ca

Ce rapport est aussi disponible en français

Canada

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.

Agriculture and Agri-Food Canada (AAFC)
1341 Baseline Road
Ottawa, ON K1A 0C5

Catalogue Number: A22-686/2024E-PDF
International Standard Book Number (ISBN): 978-0-660-72306-8
AAFC number: 13225E

Related publications registration number: POR 089-23

Cette publication est aussi disponible en français sous le titre : 2023-24 Perceptions des consommateurs à l'égard de l'agriculture, des aliments et des produits de la mer canadiens au Vietnam, au Japon, aux Philippines et en Corée du Sud

Catalogue Number: A22-686/2024F-PDF (Final Report, French)

ISBN: 978-0-660-72307-5

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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

I hereby certify as Senior Officer of Ipsos that the deliverables fully comply with the Government of Canada's political neutrality requirements outlined in the Communications Policy of the Government of Canada and Procedures for Planning and Contracting Public Opinion Research. 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.

Brad Griffin
President
Ipsos Public Affairs

Detailed findings

Purchase frequency of food products from Canada and other select markets

Overall, the purchase of Canadian food products is most prevalent among consumers in Vietnam with three quarters having done so in the 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 products from other countries asked about in the survey, consumers in all markets are most likely to have purchased food products from the US followed by Australia. The purchase of products from Canada is generally consistent with those from New Zealand and slightly higher than those from 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 in general. Nearly nine in ten have purchased a food product from the US in the past six months (88%), followed by Australia (83%), while roughly the same proportion have purchased a food product from France (76%), New Zealand (78%) or Canada (74%).
- In South Korea, consumers are most likely to have purchased food products from the US (74%) and Australia (68%), followed by Canada and New Zealand (56% for both), while fewer have purchased a food product from France (47%). Similar trends are observed in the Philippines with food products from the US the most popular (73%), while a similar proportion have purchased a food product from New Zealand (57%), Australia (55%), or Canada (55%), and those from France are the least popular (47%).
- Consumers in Japan are least likely to have purchased a food product from all countries, highlighting greater reluctance to imported food in general. Consumers are most likely to have purchased food products from the US (53%), followed by Australia (41%), Canada (32%), New Zealand (28%), and France (24%).

Frequency of purchasing food products by country of origin (COO) in the past six months in Japan

Country of Origin	Monthly	Ever
Canada	15%	32%
United States	32%	53%
New Zealand	12%	28%
Australia	20%	41%
France	9%	24%

Base: All respondents in Japan (n=1,750)

Q6. Thinking about your food purchases in the past six months, whether at a grocery store, market or online, how frequently have you purchased a food product that you knew was from each of the following countries?

Frequency of purchasing food products by country of origin (COO) in the past six months in Vietnam

Country of Origin	Monthly	Ever
Canada	55%	74%
United States	54%	88%
New Zealand	48%	78%
Australia	51%	83%
France	38%	76%

Base: All respondents in Vietnam (n=1,750)

Q6. Thinking about your food purchases in the past six months, whether at a grocery store, market or online, how frequently have you purchased a food product that you knew was from each of the following countries?

Frequency of purchasing food products by country of origin (COO) in the past six months in South Korea

Country of Origin	Monthly	Ever
Canada	25%	56%
United States	43%	74%
New Zealand	23%	56%
Australia	36%	68%
France	17%	47%

Base: All respondents in South Korea (n=1,000)

Q6. Thinking about your food purchases in the past six months, whether at a grocery store, market or online, how frequently have you purchased a food product that you knew was from each of the following countries?

Frequency of purchasing food products by country of origin (COO) in the past six months in the Philippines

Country of Origin	Monthly	Ever
Canada	34%	55%
United States	52%	73%
New Zealand	34%	57%
Australia	31%	55%
France	23%	47%

Base: All respondents in the Philippines (n=1,000)

Q6. Thinking about your food purchases in the past six months, whether at a grocery store, market or online, how frequently have you purchased a food product that you knew was from each of the following countries?

Differences are observed in the frequency of purchase of Canadian food products in the past six months by demographics, of which the most consistent across markets are by level of formal education, income, and presence of children in the household.

- In Japan, reported purchase is higher among men than women (36% versus. 29%), those with more formal education compared to those with less (high: 41% versus moderate: 29% and low: 23%), those with higher household income compared to those with lower income (high: 49% versus moderate: 40% and low: 28%), and households with children compared to those without (46% versus 29%).
- In Vietnam, reported purchase is higher among women than men (81% versus 68%), those with more formal education compared to those with less (high: 79% versus moderate: 65% and low: 46%), those with higher household income compared to those with lower income (high: 80% versus moderate: 59% and low: 48%), and households with children compared to those without (80% versus 57%).
- In South Korea, reported purchase is higher among those with more formal education compared to those with less (high: 58% versus moderate: 46% and low: 29%), those with higher household income compared to those with lower income (high: 65% versus moderate: 60% and low: 42%), and households with children compared to those without (59% versus 49%).
- In the Philippines, reported purchase is higher among younger consumers compared to older consumers (under 35 years: 63%, between 35 to 49 years: 50%, 50 years and older: 50%), those with more formal education compared to those with less (high: 59% versus moderate: 54% and low: 44%), those with higher household income compared to those with lower income (high: 66% versus moderate: 59% and low: 47%), and households with children compared to those without (58% versus 51%).

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.

Notably, 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%). 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.

Similar trends are observed when looking at frequency of purchase of Canadian food products with beef, pork and other meat, and fish and seafood generally most likely to be purchased at least once a month in most markets. The notable exceptions being confectionary and snacks (67%) and natural health products (61%) which are purchased most frequently among consumers in the Philippines and fruits and vegetables among consumers in Vietnam (70%). Despite generally widespread popularity across all markets, 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.

Frequency of purchasing Canadian food by type in the past six months in Japan

Type of food	Monthly	Ever
Beef, pork, and other meat	43%	79%
Maple syrup and honey	17%	63%
Fish and seafood	27%	58%
Fruit and vegetables	20%	41%
Confectionary and snacks	16%	39%
Wine, beer and other alcohol beverages	14%	37%
Natural health products	11%	31%

Base: Those who purchased Canadian food products within the past six months in Japan (n=572)

Q7. And how frequently have you purchased each of the following foods from Canada in the past six months?

Frequency of purchasing Canadian food by type in the past six months in Vietnam

Type of food	Monthly	Ever
Beef, pork, and other meat	69%	91%
Maple syrup and honey	48%	85%
Fish and seafood	62%	88%
Fruit and vegetables	70%	90%
Confectionary and snacks	60%	89%
Wine, beer and other alcohol beverages	51%	84%
Natural health products	54%	89%

Base: Those who purchased Canadian food products within the past six months in Vietnam (n=1,296)
Q7. And how frequently have you purchased each of the following foods from Canada in the past six months?

Frequency of purchasing Canadian food by type in the past six months in South Korea

Type of food	Monthly	Ever
Beef, pork, and other meat	52%	82%
Maple syrup and honey	22%	75%
Fish and seafood	39%	76%
Fruit and vegetables	41%	73%
Confectionary and snacks	39%	73%
Wine, beer and other alcohol beverages	36%	72%
Natural health products	31%	75%

Base: Those who purchased Canadian food products within the past six months in South Korea (n=555)
Q7. And how frequently have you purchased each of the following foods from Canada in the past six months?

Frequency of purchasing Canadian food by type in the past six months in the Philippines

Type of food	Monthly	Ever
Beef, pork, and other meat	59%	80%
Maple syrup and honey	52%	88%
Fish and seafood	57%	75%
Fruit and vegetables	60%	79%
Confectionary and snacks	67%	95%
Wine, beer and other alcohol beverages	47%	82%
Natural health products	61%	90%

Base: Those who purchased Canadian food products within the past six months in the Philippines (n=558)
Q7. And how frequently have you purchased each of the following foods from Canada in the past six months?

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

When looking at those markets where efforts have been made to promote the Canada Brand through online food retailers, awareness and purchase of Canadian food products online is considerably higher in Vietnam than in Japan. In terms of awareness, 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.

Recall seeing Canadian food products while shopping online

Recall seeing Canadian food products while shopping online	**Japan**	**Vietnam**
Yes	44%	72%
No	31%	16%
Don’t know	24%	12%

Base: Those who have shopped for food products in selected retailers in the past six months; Japan (n=386), Vietnam (n=1,461)
Q3. When shopping for food online, do you recall seeing any Canadian food products?

The recall of Canadian food products online differs by demographic, most notably gender, age, and level of formal education.

- In Vietnam, recall is higher among women (77%) than men (66%), consumers 50 years or older (76%) compared to those under 50 years (35 to 49 years: 70%, under 35 years: 69%), households with children (77%) compared to those without (55%), those who reside in an urban area (74%) compared to those in a rural area (61%), those with more formal education (77%) compared to those with less (moderate: 59%, low: 39%), and higher household income (78%) compared to those with lower income (moderate: 53%, low: 31%).
- In Japan, recall is higher among men (51%) than women (39%), households with children (65%) compared to those without (39%), and those with more formal education (51%) compared to those with less (moderate: 36%, low: 36%). Recall is also notably lower among consumers over 50 years (40%) compared to those under 50 years (35 to 49 years: 52%, under 35 years: 50%) and the lowest income households (36%) compared to those with higher income (moderate: 53%, high: 67%).

In terms of specific types of Canadian food products consumers have seen while shopping online, Vietnamese consumers are much more likely to recall most types of Canadian products compared to Japanese consumers. More than half of Vietnamese consumers recall all types of Canadian food products, while in Japan awareness is mainly concentrated on maple syrup or honey, beef, pork and other meat and fish and seafood. This aligns with the trends observed in the reported purchase of Canadian food products in general, where the same types of food had higher purchase frequency among consumers aware of Canadian offerings in each market.

In Vietnam, recall is highest for beef, pork and other meat (66%), 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%).

Recall of seeing Canadian food products

Type of food	Japan	Vietnam
Maple syrup and honey	69%	51%
Beef, pork and other meat	52%	66%
Fish and seafood	52%	56%
Wine, beer and other alcohol beverages	37%	59%
Confectionary and snacks	25%	54%
Fruit and vegetables	16%	56%
Natural health products	14%	62%
Another type of product	6%	11%
Don’t remember	0%	1%

Base: Those who recall seeing Canadian food products while shopping for food online; Japan (n=174), Vietnam (n=1,034)
Q4. Which Canadian food products do you recall seeing? Select all that apply.

As with recall of Canadian food products online in general, awareness of specific types of products differs by key demographics:

- In Vietnam, recall is higher for all types of Canadian food products among women compared to men, consumers 50 years or older compared to those under 50 years, and higher income households compared to those with lower income.
- In Japan, demographic differences are much less pronounced. Recall is higher for fish and seafood among men (60%) compared to women (42%), while women are more likely to recall confectionary and snacks (35% versus 17%). Consumers 50 or older are more likely to recall wine, beer and other alcoholic beverages (47%) compared to those under 50 (35-49: 29%, under 35: 25%). Those who reside in an urban area are more likely than those in rural areas to recall

fish and seafood (57% versus 34%), beef, pork and meat (56% versus 37%), and wine, beer and other alcoholic beverages (42% versus 19%).

When looking at the purchase of Canadian food products among online shoppers, Vietnamese consumers are considerably more likely to have purchased each type of product they saw compared to Japanese consumers, with the notable exception of maple syrup and honey where results are roughly equivalent in both markets.

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%).

Purchase of Canadian food products among those who have seen these products while shopping online.

Type of food	Japan	Vietnam
Maple syrup and honey	45%	41%
Beef, pork and other meat	33%	56%
Fish and seafood	31%	48%
Wine, beer and other alcohol beverages	16%	47%
Confectionary and snacks	14%	45%
Fruit and vegetables	9%	48%
Natural health products	6%	48%
Another type of product	1%	1%
Don’t remember	19%	2%

Base: Those who recall seeing specific Canadian food products while shopping online; Japan (n=173), Vietnam (n=1,026)
Q5. And, did you purchase any of the Canadian food products you saw? Select all that apply.

Differences are observed in the reported purchase of Canadian food products by demographics including:

- In Vietnam, reported purchase is higher for all categories among women compared to men, older consumers (in particular those 50 or older) compared to younger consumers, and those who reside in a rural area compared to those in urban areas.
- In Japan, consumers who reside in an urban area are more likely than those in rural areas to have purchased fish and seafood (35% versus 15%) or wine, beer and other alcoholic beverages (20% versus 5%). Women (20%) are more likely than men (9%) to have purchased confectionary and snacks, while consumers 35-49 are more likely than those under 35 or 50 or older to have purchased fish and seafood (45% versus 19% and 27% respectively) or fruit and vegetables (19% versus 3% and 5%).

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 (ranging from 77% to 86%) compared to Japanese consumers (ranging from 43% to 65%). Across both markets, conversion rates are generally highest for beef, pork and other meat, and fish and seafood, and lowest for wine, beer and other alcoholic beverages and natural health products.

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.

Conversion rate of product visibility into purchase for Canadian food products in Japan

Type of food	Visibility	Purchase	Conversion
Maple syrup and honey	69%	45%	66%
Beef, pork and other meat	52%	33%	64%
Fish and seafood	52%	31%	59%
Wine, beer and other alcohol beverages	37%	16%	44%
Confectionary and snacks	25%	14%	55%
Fruit and vegetables	16%	9%	56%
Natural health products	14%	6%	42%

Base: Those who recall seeing Canadian food products while shopping for food online in Japan (n=173)
Q4. Which Canadian food products do you recall seeing? Select all that apply.
Base: Those who recall seeing specific Canadian food products while shopping online in Japan (n=173)
Q5. And did you purchase any of the Canadian food products you saw? Select all that apply.

Conversion rate of product visibility into purchase for Canadian food products in Vietnam

Type of food	Visibility	Purchase	Conversion
Beef, pork and other meat	67%	56%	84%
Natural health products	62%	48%	77%
Wine, beer and other alcohol beverages	59%	47%	80%
Fish and seafood	56%	48%	85%
Fruit and vegetables	56%	48%	86%
Confectionary and snacks	54%	45%	83%
Maple syrup and honey	51%	41%	80%

Base: Those who recall seeing Canadian food products while shopping for food online in Vietnam (n=1,034)
Q4. Which Canadian food products do you recall seeing? Select all that apply.
Base: Those who recall seeing specific Canadian food products while shopping online in Vietnam (n=1,026)
Q5. And, did you purchase any of the Canadian food products you saw? Select all that apply.

Canadian product positioning

Associations with food products from Canada

When asked unaided what comes to mind when thinking of food from Canada, top-of-mind associations are dominated by mentions of specific types of foods. Consumers in all markets, with the exception of 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 Canadian food products, 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.

Other more common mentions related to positive associations with Canadian food products include quality products among consumers in the Philippines (10%) and Vietnam (6%), and clean food/ no pesticides (10%), fresh food/ organic (8%), and healthy foods/ nutritious (7%) among consumers in South Korea.

Overall associations with food products from Canada

Type of food	Japan	Vietnam	South Korea	Philippines
Specific food mention - NET	**74%**	**67%**	**47%**	**66%**
Maple syrup	43%	11%	27%	26%
Beef, pork, and other meat	16%	20%	9%	13%
Fish and seafood	13%	15%	6%	3%
Fruits	1%	11%	1%	3%
Chocolate and sweets	1%	6%	0%	11%
Honey	2%	1%	2%	1%
Dairy product	0%	2%	1%	4%
Alcohol/beer/wine	1%	3%	0%	1%
Wheat and other types of cereal (including flour)	1%	1%	2%	2%
Positive Mentions about Products - NET	**2%**	**18%**	**30%**	**21%**
Quality products	0%	6%	2%	10%
Fresh food/organic/real	1%	3%	8%	3%
Healthy foods/nutritious	0%	3%	7%	3%
Clean food/no pesticides	0%	1%	10%	0%
Delicious/tastes good	1%	2%	0%	6%
Nothing	**13%**	**2%**	**6%**	**2%**
Don't Know	**9%**	**14%**	**10%**	**5%**

Base: All respondents within each country; Japan (n=1,750), Vietnam (n=1,750), South Korea (n=1,000), Philippines (n=1,000)
Q11. When it comes to food, what is the first thing that comes to your mind when you think of Canada? (Open end question) *overall mentions of less than 2% not shown.

Differences are observed in top-of-mind associations of food with Canada by demographics, of which the most consistent trends across all markets are by age and level of formal education.

- In Japan, consumers with more formal education or higher household income are more likely than those with lower levels of education or income to associate specific types of food with Canada (in particular maple syrup or fish and seafood). Women are more likely than men to mention maple syrup, while men are more likely to think of fish and seafood. Older consumers are also more likely to mention fish and seafood than younger consumers.
- In Vietnam, associations of specific types of food with Canada (in particular beef, pork and other meat or fish and seafood) are higher among those with more formal education compared to those with less, and higher household income compared to those with lower income. Women are more likely to think of fruit compared to men, while older consumers (in particular those 50 years or older) are more likely to mention beef, pork and other meat compared to younger consumers.

- In South Korea, consumers under 35 years and those with more formal education are more likely to associate maple syrup with Canada compared to those under 35 and those with lower levels of education respectively.
- In Philippines, consumers with higher household income are more likely than those with less income to associate specific types of food with Canada (in particular maple syrup). Consumers under 35 are more likely to associate maple syrup with Canada compared to those 35 or older, while older consumers (in particular those 50 or older) are more likely to mention beef, pork and other meat.

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 however differences are observed by country with certain foods more prominent in the minds of consumers.

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.

Food products associated with Canada.

Type of food	Japan	Vietnam	South Korea	Philippines
Maple syrup	43%	15%	38%	36%
Beef, pork, and other meat	31%	40%	43%	32%
Fish and seafood	28%	30%	32%	11%
Confectionary and snacks	7%	18%	9%	41%
Honey	4%	3%	6%	2%
Fruit	4%	26%	9%	14%
Wine, beer and other alcohol beverages	4%	10%	7%	3%
Wheat and other types of cereal	4%	5%	12%	17%
Dairy products	3%	6%	4%	11%
Vegetables	1%	7%	1%	2%
Processed foods	0%	2%	1%	1%
Unprocessed foods	0%	2%	1%	1%
Bread and pastries	0%	1%	1%	4%
Brand name	0%	1%	1%	6%
Natural health products	0%	4%	8%	1%
Other	0%	2%	1%	3%
Nothing	16%	2%	5%	3%
Don't know	12%	15%	12%	9%

Base: All respondents within each country; Japan (n=1,750), Vietnam (n=1,750), South Korea (n=1,000), Philippines (n=1,000)

Q12. Please name up to three foods that you associate with being from Canada.

Differences are observed in food products associated with Canada by demographics, of which the most prominent across all markets are by level of formal education and household income.

- In Japan, consumers with more formal education or higher household income are more likely than those with lower levels of education or income to associate any type of food with Canada (in particular beef, pork and other meat, maple syrup and fish and seafood). Women are more likely than men to mention maple syrup, while men are more likely to think of fish and seafood. Older consumers are more likely to mention fish and seafood or beef, pork and other meat than younger consumers (in particular those under 35 years).
- In Vietnam, consumers with more formal education or higher household income are more likely than those with lower levels of education or income to associate any type of food with Canada (most notably maple syrup, beef, pork and other meat, fish and seafood and fruit). Women are more likely than men to mention fish and seafood or maple syrup. Older consumers (in particular those 50 years or older) are more likely to mention beef, pork and other meat or fish and seafood compared to younger consumers, while younger consumers are more likely to mention confectionary or snacks or maple syrup.

- In South Korea, women are more likely than men to mention wheat and other types of cereal, confectionary and snacks, and natural health products, while men are more likely to mention fish and seafood.
- In Philippines, consumers with more formal education or higher household income are more likely than those with lower levels of education or income to associate any type of food with Canada (in particular beef, pork and other meat, maple syrup and fish and seafood). Women are more likely than men to mention confectionary and snacks, while men are more likely to mention fruit. Consumers under 35 years are more likely to mention maple syrup and wheat compared to those 35 or older, while older consumers (in particular those 50 years or older) are more likely to mention beef, pork and other meat or fruit.

Identification of food products from Canada

Among those who have purchased a Canadian food product in the past six months, by far the most common way consumers knew it was from Canada is because the product had a "Made in Canada" alabel (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.

Identifying Canadian food products

Ways of identifying Canadian food products	Japan	Vietnam	South Korea	Philippines
"Made in Canada" label	73%	79%	61%	79%
Maple Leaf symbol	38%	51%	50%	45%
Promoted as a Canadian product in-store	17%	53%	30%	30%
Familiarity with brand name or producer	13%	50%	23%	41%
Promoted as a Canadian product online	12%	47%	29%	33%
I assumed it was, but didn't know for sure	4%	0%	1%	3%

Base: Those who have ever purchased at least one type of Canadian food product in the past six months; Japan (n=550), Vietnam (n=1,286), South Korea (n=543), Philippines (n=549)
Q10. How could you tell these products were from Canada? (open ended question)

The most consistent differences across markets in the ways consumers could tell a product was from Canada by demographics are by household income, while age, gender, and education also play a role in some countries:

- In Japan, consumers with higher household income are more likely to mention the maple leaf symbol, that the product was promoted as Canadian online, or familiarity with the brand name or producer compared to those with lower income. Mentions of a "Made in Canada" label are higher among consumers 50 years or older compared to those under 50 and those who reside in urban areas compared to those in rural areas.

- In Vietnam, food products are more likely to be identified as Canadian using all the ways listed among women compared to men, older consumers compared to younger consumers, those with more formal education compared to those with less, and higher household income compared to those with lower levels of income.
- In South Korea, women are more likely to mention the maple leaf symbol than men, while consumers with higher household income are more likely to say a "Made in Canada" label compared to those with lower income.
- In the Philippines, products are more likely to be identified as Canadian using all the ways listed among those with more formal education compared to those with less, higher household income compared to those with lower levels of income, and those who reside in urban areas compared to those in rural areas.

Satisfaction with food products from Canada

Among those who have purchased a Canadian food product in the past six months, the vast majority of consumers in all markets were satisfied with the product and impressions are strongest in Vietnam (96%) and the Philippines (94%), followed by Japan (80%) and South Korea (76%). Notably, 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).

Satisfaction with Canadian food products

Level of satisfaction	Japan	Vietnam	South Korea	Philippines
Very/Somewhat Satisfied	**80%**	**96%**	**76%**	**94%**
Very satisfied	20%	73%	14%	49%
Somewhat satisfied	60%	23%	62%	45%
Neither satisfied nor dissatisfied	19%	4%	23%	6%
Somewhat dissatisfied	1%	0%	1%	0%
Very dissatisfied	0%	0%	0%	0%

Base: Those who have ever purchased at least one type of Canadian food product in the past six months; Japan (n=550), Vietnam (n=1,286), South Korea (n=543), Philippines (n=549)
Q8. Generally speaking, how satisfied or dissatisfied were you with the Canadian food product(s) you purchased?

Notable differences in satisfaction with Canadian food products by demographics include:

- In Japan, consumers under 50 (under 35: 27%, 35-49: 25%) and those with moderate to high household income (26% for both) are more likely to say they are “very satisfied” compared to those 50 years or older (16%) and those with lower income (15%) respectively.

- In Vietnam, older consumers (50 years and older: 85%, 35-49: 73%) and women (77%) are more likely to be “very satisfied” compared to younger consumers (under 35 years: 63%) and men (69%) respectively.
- In South Korea, consumers under 50 years (under 35 years: 19%, 35-49: 21%) are more likely to be “very satisfied” compared to those 50 years or older (8%).
- In the Philippines, satisfaction is higher among those who reside in an urban area (96%) compared to those in rural areas (87%), driven primarily by a greater proportion who are “very satisfied” (52% and 36% respectively).

Reasons for satisfaction with food products from Canada

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 much 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%). Due to very small sample sizes, results among those who are dissatisfied with the Canadian food product they purchased are too small for reporting.

Reasons for satisfaction with Canadian food products

Reason for satisfaction	Japan	Vietnam	South Korea	Philippines
Delicious/tastes good	44%	14%	16%	20%
Good price/affordable	25%	10%	24%	9%
Quality product/good food	21%	47%	31%	49%
Healthy/nutritious/safe foods	10%	20%	9%	8%
Good/satisfied/like it	7%	12%	13%	18%
Fresh/natural/organic foods	5%	12%	17%	8%
Quality brand/trustworthy/reliable	3%	4%	8%	2%
Imported/informative of origin	1%	4%	1%	3%
Good packaging/labeling	1%	3%	1%	3%
Clean food/pure	0%	2%	6%	0%
Other positive mentions	3%	2%	2%	6%

Base: Those who are very or somewhat satisfied with Canadian food products purchased in the past six months Japan (n=440), Vietnam (n=1,231), South Korea (n=511), Philippines (n=513)
Q9. You indicated you were [insert response from Q8: Very/Somewhat satisfied]. Why do you say that? (verbatim comments recorded and coded)

Differences in reasons for satisfaction with Canadian food products by demographics include:

- In Japan, taste is mentioned more frequently among women (50%) than men (40%), younger consumers (under 35: 55%) compared to older consumers (35-49: 44%, 50 years and older: 41%) and those with lower household incomes (49%) compared to those with high income (30%). Consumers with higher income are more likely to mention healthy (22% versus 7% among low income) and fresh (13% versus 3%) compared to those with lower income.
- In Vietnam, quality is mentioned more often among women (50%) compared to men (44%) and higher income households (50%) compared to those with moderate (35%) or low income (38%). Women are also more likely to mention healthy (24%) and fresh (14%) compared to men (16% and 10%).
- There are no notable differences in the Philippines or South Korea.

Perceived attributes of food products from Canada

Canadian food products are most strongly associated with being “high-quality”, “safe” and “trustworthy” across all markets, while ratings are also relatively high for being “healthy” and “great tasting”. Impressions are generally weaker for being seen as “innovative” and “diverse” (in other words, range of offerings), while ratings on “sustainability-produced” and “fresh” also tend to be softer in most markets. Notably, consumers do not perceive Canadian food to be particularly “expensive” and ratings in this area are generally among the lowest of any attribute across all markets.

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 in particular where consumers are more likely to express a neutral opinion or say they don’t know.

- In Japan, ratings of Canadian food 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 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 is 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 “sustainably-produced” (51%).
- In the Philippines, consumer impressions of Canadian food 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%).

Perceptions of food products from Canada in Japan

Traits of food	Strongly Agree	Somewhat Agree	Total Agree
High quality	6%	32%	38%
Sustainably-produced	3%	20%	23%
Safe	7%	37%	44%
Diverse (range of food products)	4%	25%	29%
Innovative	2%	11%	13%
Trustworthy	8%	40%	48%
Healthy	4%	30%	34%
Expensive	3%	22%	25%
Great tasting	10%	42%	52%
Fresh	4%	26%	30%

Base: All respondents in Japan (n=1,750)
Q13. To what extent do you agree or disagree with each the following statements as it relates to Canadian food. Canadian food is….

Perceptions of food products from Canada in Vietnam

Traits of food	Strongly Agree	Somewhat Agree	Total Agree
High quality	57%	29%	86%
Sustainably-produced	48%	34%	82%
Safe	56%	29%	85%
Diverse (range of food products)	42%	35%	77%
Innovative	42%	36%	78%
Trustworthy	55%	30%	85%
Healthy	51%	33%	84%
Expensive	25%	35%	60%

Great tasting	49%	32%	81%
Fresh	45%	32%	77%

Base: All respondents in Vietnam (n=1,750)
Q13. To what extent do you agree or disagree with each the following statements as it relates to Canadian food. Canadian food is….

Perceptions of food products from Canada in South Korea

Traits of food	Strongly Agree	Somewhat Agree	Total Agree
High quality	12%	49%	62%
Sustainably-produced	7%	44%	51%
Safe	11%	51%	62%
Diverse (range of food products)	6%	34%	40%
Innovative	4%	20%	24%
Trustworthy	13%	50%	63%
Healthy	11%	49%	60%
Expensive	5%	28%	33%
Great tasting	9%	48%	57%
Fresh	11%	44%	55%

Base: All respondents in South Korea (n=1,000)
Q13. To what extent do you agree or disagree with each the following statements as it relates to Canadian food. Canadian food is….

Perceptions of food products from Canada in the Philippines

Traits of food	Strongly Agree	Somewhat Agree	Total Agree
High quality	53%	35%	88%
Sustainably-produced	36%	41%	77%
Safe	47%	38%	85%
Diverse (range of food products)	34%	43%	76%
Innovative	35%	40%	75%
Trustworthy	44%	40%	84%
Healthy	38%	41%	79%
Expensive	26%	46%	72%
Great tasting	44%	39%	83%
Fresh	36%	40%	76%

Base: All respondents in the Philippines (n=1,000)
Q13. To what extent do you agree or disagree with each the following statements as it relates to Canadian food. Canadian food is….

Notable differences are observed in impressions of Canadian food by demographics and are primarily driven by level of formal education and income across all markets.

- In Japan, associations with Canadian food are stronger across all attributes among those with more formal education compared to those with less, those with higher household income compared to those with lower levels of income, and those who reside in an urban area compared to those in rural areas, with the exception of being "innovative" or "expensive" where results are generally consistent. Notably, consumers with less education, lower income, and those who reside in a rural area are generally more likely to say they don't know enough to provide a rating for each attribute. Consumers 50 years or older are less likely to rate Canadian food highly for being "diverse", "innovative", and "expensive" compared to those under 50 due to a higher proportion who express a neutral opinion.
- In Vietnam, ratings of Canadian food are higher across all attributes among women compared to men, consumers 35 years or older compared to those under 35, those with more formal education compared to those with less, those with higher household income compared to those with lower levels of income, and those who reside in an urban area compared to those in rural

areas. These gaps in ratings are driven primarily by a higher proportion who express a neutral opinion or say they don't know among men, younger consumers, those with less education, lower income or those who reside in a rural area.

- In South Korea, impressions of Canadian food are generally stronger among those with higher household income compared to those with low income who are more likely to say they don't know. Men are more likely than women to rate Canadian food highly for being "safe" or "innovative", while consumers under 35 years are more likely to provide high ratings for "diverse" compared to those 35 or older.
- In the Philippines, associations with Canadian food are stronger across all attributes among those with more formal education compared to those with less, those with higher household income compared to those with lower income, and those who reside in an urban area compared to those in rural areas (with the exception of being "expensive" and "sustainably-produced" where results are generally consistent). The gaps in ratings are driven primarily by a higher proportion who say they don't know among those with less education, lower income, and those who reside in a rural area. Women are more likely than men to rate Canadian food higher for being "high-quality" and "expensive".

Interest in buying food products from Canada and other select markets

Most consumers in all markets express at least a moderate degree of interest in buying food products from Canada in the future, although strength of interest varies considerably by country. Overall, interest in food products from Canada is by far the highest in the Philippines (94% "very" or "somewhat interested") and Vietnam (88%), where more than half of consumers 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 (4% and 10% respectively).

In comparison to food products from other countries asked about in the survey, 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%).

Interest in buying food products from various countries in the future in Japan

Country	Very interested	Somewhat interested	Total interested
Australia	7%	46%	53%
Canada	8%	41%	49%
United States	7%	41%	48%
New Zealand	7%	41%	48%
France	7%	38%	45%

Base: All respondents in Japan (n=1,750)
Q14. To what extent would you say you are interested in buying food products from the following countries in the future?

Interest in buying food products from various countries in the future in Vietnam

Country	Very interested	Somewhat interested	Total interested
Australia	38%	47%	85%
Canada	55%	33%	88%
United States	39%	47%	86%
New Zealand	34%	46%	80%
France	27%	48%	75%

Base: All respondents in Vietnam (n=1,750)
Q14. To what extent would you say you are interested in buying food products from the following countries in the future?

Interest in buying food products from various countries in the future in South Korea

Country	Very interested	Somewhat interested	Total interested
Australia	13%	57%	70%
Canada	11%	55%	66%
United States	10%	54%	64%
New Zealand	11%	53%	65%
France	6%	42%	48%

Base: All respondents in South Korea (n=1,000)
Q14. To what extent would you say you are interested in buying food products from the following countries in the future?

Interest in buying food products from various countries in the future in the Philippines

Country	Very interested	Somewhat interested	Total interested
Australia	41%	51%	92%
Canada	53%	41%	94%
United States	51%	41%	92%
New Zealand	44%	48%	92%
France	36%	50%	86%

Base: All respondents in the Philippines(n=1,000)
Q14. To what extent would you say you are interested in buying food products from the following countries in the future?

Interest in buying food products from Canada differs by demographics across all markets, with the most consistent differences observed by level of education, income, and whether they reside in an urban or rural area.

- In Japan, interest in food products from Canada is higher among those with more formal education (58%) compared to those with less (moderate: 45%, low: 38%), those with higher household income (high: 65%, moderate: 56%) compared to those with lower income (45%), and those who reside in urban areas (51%) compared to those in rural areas (43%).
- In Vietnam, women (61%) and older consumers (50 years and older: 62%, 35-49: 55%) are more likely to be ”very interested” in buying food products from Canada compared to men (49%) and

younger consumers (under 35: 48%) respectively. Interest is also higher among those with more formal education (high: 90%, moderate: 84%) compared to those with less (low: 66%), those with higher household income (high: 92%, moderate: 80%) compared to those with lower income (63%), and those who reside in urban areas (91%) compared to those in rural areas (77%).

- In South Korea, interest in food products from Canada is higher among consumers 50 years or older (72%) compared to those under 50 years (35-49: 64%, under 35: 58%), those with more formal education (69%) compared to those with less (moderate: 56%, low: 13%), those with higher household income (high: 72%, moderate: 71%) compared to those with lower income (55%), and those who reside in urban areas (69%) compared to those in rural areas (59%).
- In the Philippines, consumers with more formal education (high: 55%, moderate: 44%), those with higher household income (high: 66%, moderate: 58%), and those who reside in urban areas (57%) are more likely to be "very interested" compared to those with less education (low: 43%), lower income (43%), and those in rural areas (42%) respectively. Women (44%) are more likely to be "somewhat interested" than men (37%).

Social media consumption habits

Recall of Canadian food products on social media in Japan and Vietnam

Among consumers in Japan and Vietnam who report using each social media platform, a strong majority 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%).

Exposure to content about Canadian food on social media platforms.

Social media platform	Japan	Vietnam
YouTube	76%	62%
Instagram	32%	27%
Facebook	-	62%
TikTok	-	53%
None of the above	-	17%

Base: All respondents from Japan who use Instagram or YouTube (1,579), and all respondents from Vietnam who use YouTube, Instagram, Facebook, or TikTok (n=1,748).
Q16. Have you seen any content about Canadian food on the following platforms within the past six months?

Differences are observed in recall of content about Canadian food on social media platforms by demographics including:

- In Japan, recall of content on YouTube is higher among men (85%) compared to women (68%), while women are more likely to mention seeing something on Instagram (41% versus 22% among men). Higher income households (high: 45%, moderate: 35%) are also more likely to recall content on Instagram compared to those with lower income (low: 29%).
- In Vietnam, recall of content on all social media platforms is higher among women than men, those with more formal education compared to those with less, and those with higher household income compared to those with lower income. Older consumers are more likely to have seen content about Canadian food on YouTube (35 years or older: 64%, under 35: 57%) or Instagram (50 years and older: 35%, 35-49: 23%, under 35: 24%) compared to younger consumers.

Frequency of use of social media platforms

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. Consumers in all markets are most likely to report using YouTube on a frequent basis, while Facebook is equally as popular in Vietnam of the Philippines.

- 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%).

Frequency of use of social media platforms in Japan

Social media platform	Once a week or more often	Ever
YouTube	79%	89%
Instagram	46%	58%
Facebook	27%	46%
TikTok	24%	36%

Base: All respondents in Japan (n=1,750)
Q15. How frequently do you use each of the following social media platforms?

Frequency of use of social media platforms in Vietnam

Social media platform	Once a week or more often	Ever
YouTube	97%	100%
Instagram	71%	86%
Facebook	97%	99%

TikTok	85%	92%

Base: All respondents in Vietnam (n=1,750)
Q15. How frequently do you use each of the following social media platforms?

Frequency of use of social media platforms in South Korea

Social media platform	Once a week or more often	Ever
YouTube	94%	98%
Instagram	69%	81%
Facebook	51%	71%
TikTok	33%	45%

Base: All respondents in South Korea (n=1,000)
Q15. How frequently do you use each of the following social media platforms?

Frequency of use of social media platforms in the Philippines

Social media platform	Once a week or more often	Ever
YouTube	97%	100%
Instagram	79%	90%
Facebook	97%	99%
TikTok	76%	87%

Base: All respondents in the Philippines (n=1,000)
Q15. How frequently do you use each of the following social media platforms?

Differences are observed in the frequency of use of social media platforms by demographics and is notably higher among younger consumers across all markets.

- In Japan, younger consumers (in particular those under 35 years) are more likely than older consumers to use all platforms on a frequent basis, with the exception of Facebook. Men are more likely to report using YouTube on a frequent basis compared to women, while women are more likely to use Instagram.
- In Vietnam, consumers with higher household incomes are more likely to use all platforms compared to those with lower income. Younger consumers are more likely to use Instagram or TikTok compared to older consumers, while women are more likely to use TikTok or Instagram compared to men.

- In South Korea, consumers with higher household income are more likely to use all platforms compared to those with lower income. Younger consumers are more likely to use YouTube or Instagram compared to older consumers, while men are more likely to use Facebook than women.
- In the Philippines, younger consumers are more likely to use Instagram or TikTok compared to older consumers, while women are more likely to use TikTok than men.

Sources of inspiration

Consumers report relying on a diverse range of sources for culinary inspiration and information about food and seafood. YouTube, search engines like Google, family and friends, and Facebook are the most common 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%).

Sources of inspiration and information on food

Source of inspiration and information on food	Japan	Vietnam	South Korea	Philippines
Cooking shows on television	38%	35%	28%	46%
YouTube	31%	69%	70%	88%
Google or other search engine	31%	52%	52%	55%
News outlets (physical newspapers or online)	24%	22%	16%	12%
Friends or family	23%	40%	30%	57%
Instagram	16%	19%	29%	32%
Cookbooks you have at home	14%	20%	9%	29%
Lifestyle magazines who talk about food	12%	23%	9%	23%
TikTok	7%	50%	8%	45%
International news outlets (physical newspapers or online)	7%	16%	4%	10%
Facebook	3%	57%	10%	68%
Pinterest	2%	10%	4%	15%
Other	10%	21%	2%	1%
None of the above	22%	1%	5%	1%

Base: All respondents within each country; Japan (n=1,750), Vietnam (n=1,750), South Korea (n=1,000), Philippines (n=1,000)
Q17. When it comes to cooking and food, where do you turn to for inspiration and/or to look for information on food and seafood?

Differences are observed regarding preferred sources of inspiration and information for food by demographic including:

- In Japan, women are more likely than men to rely on cooking shows, lifestyle magazines, cookbooks, and Instagram, while men are more likely to use YouTube or news outlets. Older consumers (in particular those 50 years or older) are more likely to rely on cooking shows or news outlets compared to younger consumers and less likely to use YouTube or Instagram.
- In Vietnam, older consumers (in particular those 50 years or older) are more likely to rely on Instagram or news outlets compared to younger consumers. Women are more likely than men to use YouTube, Facebook, Instagram, TikTok or Pinterest.
- In South Korea, women are more likely than men to rely on friends and family, cooking shows on television, cookbooks or Instagram, while men are more likely to use Google or other search engines. Younger consumers (in particular those under 35 years) are more likely to use Instagram and less likely to rely on cooking shows on television compared to older consumers.
- In the Philippines, women are more likely than men to rely on cooking shows on television, YouTube, Facebook, Pinterest or TikTok, while men are more likely to use news outlets. Younger

consumers (in particular those under 35 years) are more likely to use TikTok or Instagram compared to older consumers who are more likely to rely on Google or other search engines.

Food purchasing locations

The retail landscape varies across markets, with Japan and South Korea having a more concentrated market dominated by a few leading retailers, while Vietnam and the Philippines have a more dispersed market with several retailers having substantial market penetration.

In Japan, consumers are by far most likely to report purchasing food from Aeon (56%) in the past six months, followed by Gyomu Supa (37%), Amazon (26%), and Rakuten (22%), while in South Korea, Emart (75%) is the most frequented food retailer, followed by Coupang (67%), Home Plus (56%), and Lotte Mart (44%).

In Vietnam and the Philippines, consumers report having made food purchases at a wider variety of retailers in the past six months. In Vietnam, consumers are most likely to report purchasing food from Big C (66%), followed by Shopee (59%), and Coopmart (54%), while Lazada (46%), Aeon (38%), and TikTok Shop (37%) are also among the most frequented retailers. In the Philippines, 7-Eleven (74%) is the most prominent food retailer, followed by Shopee (63%), Mercury Drugstore (58%), SM Hypermarket (58%), Lazada (54%), and Puregold (53%), while Robinson's (49%), Savemore (45%), Watsons' (44%), and Alfamart (44%) are also relatively prominent.

Notably, some retailers have a significant presence in multiple countries:

- Aeon in Vietnam and Japan
- Shopee and Lazada in Vietnam and the Philippines
- LotteMart in Vietnam and South Korea

Food retailers purchased from within the last six months in Japan

Retailer	Purchased from in past six months
Aeon Japan	56%
Gyomu Supa	37%
Amazon	26%
Rakuten Ichiba	22%
Ito-Yokado	15%
Yahoo Marketplace	15%
Seijo-Ishii	11%
Costco Japan	11%
Isetan/Mitsukoshi	5%
Takashimaya	5%
Kinokuniya	2%
None of the above	16%

Base: All respondents in Japan (n=1,750)
Q2. In the past six months have you purchased food at any the following: Select all that apply.

Food retailers purchased from within the last six months in Vietnam

Retailer	Purchased from in past six months
Big C	66%
Shopee Vietnam	59%
Coopmart	54%
Lazada Vietnam	46%
AEON Vietnam	38%
TikTok Shop	37%
Vinmart	34%
WinMart	32%
Lottemart	29%
Tiki	23%
MegaMarket	18%
Zalo	15%
Emart Vietnam	10%
Homefarm	6%
AceFoods	5%
Soi Vien	5%
None of the above	2%

Base: All respondents in Vietnam (n=1,750)
Q2. In the past six months have you purchased food at any the following: Select all that apply.

Food retailers purchased from within the last six months in South Korea

Retailer	Purchased from in past six months
Emart South Korea	75%
Coupang	67%
Homeplus	56%
Lotte Mart	44%
Market Kurly	32%
SSG.com	31%
Costco	27%
None of the above	3%

Base: All respondents in South Korea (n=1,000)
Q2. In the past six months have you purchased food at any the following: Select all that apply.

Food retailers purchased from within the last six months in the Philippines

Philippines	Percent of respondents
7-Eleven	74%
Shopee Philippines	63%
Mercury Drugstore	58%
SM Hypermarket	58%
Lazada Philippines	54%
Puregold	53%
Robinson's Supermarket	49%
Savemore	45%
Watson's	44%
Alfamart	26%
Metro Gaisano	21%
Walter Mart	18%
Shopwise	13%
AllDay	11%
The Landmark	10%
Supre8 Grocery Warehouse	9%
Marketplace by Rustan's	8%
Prince Hypermart	7%
GoCart	2%
None of the above	1%

Base: All respondents in the Philippines (n=1,000)

Q2. In the past six months have you purchased food at any the following: Select all that apply.

Purchase behaviour by retailer varies by demographics across markets, of which the most consistent differences are level of education and income:

- In Japan, men are more likely to report having purchased food at Aeon (58%) or Amazon (29%) compared to women (53% and 23% respectively). Younger consumers are also more likely to have purchased food at Aeon (under 35: 62%) or Amazon (33%) compared to older consumers (50 years and older: 53% and 23%), and less likely to have shopped for food at Gyomu Supa (30% versus 35-49: 41%, 50 years and older: 38%). Consumers with more formal education or higher household income are more likely to have purchased food from Amazon (30% and 42%) , Rakuten Ichiba (26% and 37%), and Seijo-Ishii (17% and 29%) compared to those with less education (moderate: 20%, 18%, 8%; low: 23%, 19%, 4%) and lower income (moderate: 30%, 26%, 16%; low: 24%, 20%, 6%) respectively.

- In Vietnam, reported purchase of food at nearly all retailers is higher among women compared to men, those with more formal education compared to those with less, those with higher household income compared to those with lower income, and those who reside in urban areas compared to those in rural areas. Younger consumers are more likely to report purchasing food at several retailers including Shopee (under 35: 69%, 35-49: 57%, 50 years and older: 49%), Aeon (46%, 37%, 31%), WinMart (41%, 32%, 22%), TikTok Shop (50%, 33%, 27%), Emart (18%, 7%, 6%), Homefarm (10%, 5%, 4%), and AceFoods (8%, 5%, 3%) compared to older consumers, while older consumers are more likely to report purchasing food at Coopmart (50 years and older: 62%, 35-49: 51%, under 35: 50%).
- In South Korea, reported purchase of food at nearly all retailers is higher among those with more formal education compared to those with less, those with higher household income compared to those with lower income, and those who reside in urban areas compared to those in rural areas. Women are more likely than men to have purchased food from Homeplus (59% versus 53%) and Market Kurly (36% versus 29%). Consumers under 35 years are more likely to have purchased food at Coupang compared to older consumers (under 35: 78%, 35-49: 62%, 50 years and older: 65%).
- In the Philippines, reported purchase of food at nearly all retailers is higher among those with more formal education compared to those with less, those with higher household income compared to those with lower income, and those who reside in urban areas compared to those in rural areas. Consumers under 35 years are more likely to report purchasing food at 7-Eleven (80% versus 35-49: 72%, 50+: 67%) and Shopee (72% versus 35-49: 57%, 50 years and older: 55%) compared to those 35 years or older. Women are more likely to have purchased food at Watson’s than men (49% versus 40%).

Profile of respondents

The demographic characteristics of the surveyed populations are presented below. Data presented are weighted proportions.

Japan

Age	Sample proportion
18-24	3%
25-34	15%
35-44	12%
45-54	34%
55-64	33%
65 and older	3%

Education	Sample proportion
Graduate schools	5%
Universities	41%
Junior colleges	9%
Colleges of technology	2%
Professional training colleges	11%
Upper secondary specialized training schools	1%
Upper secondary schools	29%
Lower secondary schools	2%

Gender	Sample proportion
Male	48%
Female	52%
Another gender	0%
Prefer not to answer	1%

Income	Sample proportion
Low (¥5,999,999 or less annually)	52%
Medium (¥6,000,000 to ¥11,999,999 annually)	32%
High (¥12,000,000 or more annually)	6%
Prefer not to answer	10%

Region	Sample proportion
Kanto	35%
Chubu	18%
Kansai	16%
Kyushu/Okinawa	11%
Tohoku	7%

Chugoku	6%
Hokkaido	4%
Shikoku	3%

Vietnam

Age	Sample proportion
18-24	12%
25-34	24%
35-44	20%
45-54	29%
55-64	16%
65 and older	0%

Education	Sample proportion
Doctor	1%
Masters	4%
Universities	66%
Colleges	12%
Vocational schools	3%
Upper secondary school	11%
Lower secondary school	3%
Primary school and below	1%

Gender	Sample proportion
Male	49%
Female	51%
Another gender	0%
Prefer not to answer	0%

Income	Sample proportion
Low (6,500,000 VND or less monthly)	4%

Medium (6,500,001 VND to 15,000,000 VND monthly)	20%
High (15,000,001 VND or more monthly)	75%
Prefer not to answer	1%

Region	Sample proportion
Red River Delta	23%
South East	19%
Mekong River Delta	19%
North Central Coast	11%
South Central Coast	10%
Northeast	8%
Central Highlands	6%
Northwest	4%

Philippines

Age	Sample proportion
18-24	15%
25-34	28%
35-44	17%
45-54	26%
55-64	13%
65 and older	1%

Education	Sample proportion
Has Masters/Doctorate degree	2%
Some Masters	4%

Has a degree	55%
Some college	27%
Completed high school	11%
Some high school	1%
Completed elementary	0%
Some elementary	0%

Gender	Sample proportion
Male	47%
Female	51%
Another gender	1%
Prefer not to answer	1%

Income	Sample proportion
Low (P 25,000 or less monthly)	35%
Medium (P 25,001 to P 85,000 monthly)	52%
High (P 85,001 or more monthly)	12%
Prefer not to answer	1%

Region	Sample proportion
Luzon	59%
Mindanao	22%
Visayas	19%

South Korea

Age	Sample proportion
18-24	4%
25-34	20%

35-44	15%
45-54	37%
55-64	23%
65 and older	1%

Education	Sample proportion
Grad school Ph.D program	3%
Grad school Master's program	10%
University (4 years or more)	55%
University (2,3 years)	13%
High school	19%
Middle school	0%
Elementary school	0%
None (inc. Preschool)	0%

Gender	Sample proportion
Male	50%
Female	50%
Another gender	1%
Prefer not to answer	1%

Income	Sample proportion
Low (39,999,999 won or less annually)	27%
Medium (40,000,000 won to 79,999,999 won annually)	48%
High (80,000,000 won or more annually)	23%
Prefer not to answer	1%

Region	Sample proportion
Gyeonggi and Gangwon	34%
Gyeongsang	25%
Seoul	19%
Chungcheong	11%
Jeolla	10%
Jeju	1%

Appendix

Detailed methodology

Ipsos conducted a quantitative survey using Computer Assisted Web Interviewing (CAWI). Surveys were self-completed online and conducted among a national sample of consumers from Japan, Vietnam, South Korea, and the Philippines. A total of n=1,750 surveys were completed in each Vietnam and Japan, and n=1,000 in the Philippines and South Korea (5,500 interviews overall). Consumers were defined as individuals who are 20 years or older, and responsible in total or in part, for shopping for food products in their households.

Fieldwork was conducted from February 22 to March 11, 2024. Average survey length varied by country: in Japan, 5 minutes; in Vietnam, 10 minutes; in South Korea, 5 minutes; and in the Philippines, 8 minutes. Interviews were conducted in the respective language for each country and were administered in Japanese, Vietnamese, Korean, and English (for the Philippines).

Quotas and weighting were employed by gender, age, and region to reflect the composition of the general population in each country, based on the most recent Census data available for each country. A margin of error cannot be calculated given the study utilized sample from non-probability online panels.

The sample for the survey was sourced from Ipsos' proprietary panels and a programmatic network of vetted vendors across all markets. Incentives are not used for recruitment purposes to ensure quality, but respondents are incentivized for completing surveys directly proportionate to the amount of time taken to complete the survey and with comparable incentives offered by other online panel sources.

Sample composition and weighting

The table below indicates the unweighted (counts and proportions) and weighted demographic distribution (proportions) of the sample for each market. Weighting was applied to the responses by age, gender, and region within each country to ensure that the final data reflects the adult population of each country. Weighting targets were defined based on the latest Census data available in each country: Japan Census 2020, Vietnam Census 2019, South Korea Census 2020, Philippines Census 2015.

Sample frame Japan

Age

Age	Unweighted Sample Size (counts)	Unweighted Sample Proportions (%)	Weighted Sample Proportions (%)
18-24	40	2%	2.5%
25-34	248	14%	15.5%
35-44	271	15%	11.7%
45-54	635	36%	34.4%
55-64	517	30%	33.2%
65 years and older	39	2%	2.5%

Gender

Gender	Unweighted Sample Size (counts)	Unweighted Sample Proportions (%)	Weighted Sample Proportions (%)
Men	824	47.2%	48%
Women	922	52.8%	52.1%
Other/ Prefer not to answer	0	0%	

Region

Region	Unweighted Sample Size (counts)	Unweighted Sample Proportions (%)	Weighted Sample Proportions (%)
Hokkaido	77	4.4%	4.3%
Tohoku	122	7%	7%
Kanto	616	35.2%	34.7%
Chubu	318	18.2%	18.1%
Kansai	285	16.3%	16.2%
Chugoku	100	5.7%	5.7%
Shikoku	51	2.9%	2.9%
Kyushu/Okinawa	191	11%	11.1%
Total	1,750	100%	

Sample frame Vietnam.

Age

Age	Unweighted Sample Size (counts)	Unweighted Sample Proportions (%)	Weighted Sample Proportions (%)
18-24	230	13.1%	11.8%
25-34	456	26.1%	15.5%
35-44	417	23.8%	19.8%
45-54	459	26.2%	28.8%
55-64	187	10.7%	15.9%
65 years and older	1	0.01%	0.1%

Gender

Gender	Unweighted Sample Size (counts)	Unweighted Sample Proportions (%)	Weighted Sample Proportions (%)
Men	897	51.3%	48.5%
Women	852	48.7%	51.5%
Other/ Prefer not to answer	0	0%	

Region

Region	Unweighted Sample Size (counts)	Unweighted Sample Proportions (%)	Weighted Sample Proportions (%)
Central Highlands	95	5.4%	5.5%
Mekong River Delta	324	18.5%	18.5%
North Central Coast	167	9.5%	11.2%
South Central Coast	168	9.6%	9.6%
Northeast	139	7.9%	7.9%
Northwest	69	3.9%	4.4%
Red River Delta	432	24.7%	23.5%
Southeast	356	20.3%	19.4%
Total	1,750	100%	

Sample frame South Korea

Age

Age	Unweighted Sample Size (counts)	Unweighted Sample Proportions (%)	Weighted Sample Proportions (%)
18-24	44	4.4%	4.4%
25-34	197	19.7%	19.6%
35-44	179	17.9%	14.7%
45-54	367	36.7%	36.9%
55-64	200	20%	23%
65 years and older	13	1.3%	1.5%

Gender

Gender	Unweighted Sample Size (counts)	Unweighted Sample Proportions (%)	Weighted Sample Proportions (%)
Men	502	50.2%	50%
Women	498	49.8%	50%
Other/ Prefer not to answer	-	-	

Region

Region	Unweighted Sample Size (counts)	Unweighted Sample Proportions (%)	Weighted Sample Proportions (%)
Seoul	190	19%	19%
Gyeonggi and Gangwon	343	34.3%	34.3%
Gyeongsang	250	25%	24.9%
Jeolla	97	9.7%	9.7%
Chungcheong	109	10.9%	10.7%
Jeju	11	1.1%	1.3%
Total	1,000	100%	

Sample frame Philippines

Age

Age	Unweighted Sample Size (counts)	Unweighted Sample Proportions (%)	Weighted Sample Proportions (%)
18-24	155	15.5%	15.2%
25-34	286	28.6%	27.8%
35-44	221	22.1%	17.1%
45-54	255	25.5%	26.3%
55-64	79	7.9%	13.1%
65 years and older	4	0.4%	0.6%

Gender

Gender	Unweighted Sample Size (counts)	Unweighted Sample Proportions (%)	Weighted Sample Proportions (%)
Men	485	48.5%	48.4%
Women	509	50.9%	51.6%
Other/ Prefer not to answer	6	0.6%	

Region

Region	Unweighted Sample Size (counts)	Unweighted Sample Proportions (%)	Weighted Sample Proportions (%)
Luzon	593	59.3%	58.6%
Mindanao	221	22.1%	22.4%
Visayas	186	18.6%	19.1%
Total	1,000	100%	

Non-response bias

If there is no systematic bias in responding to the survey, the unweighted profile of the survey participants would be very similar to the population profile from each country according to the latest Census data available (within normal sampling error). The tables above demonstrate that in most cases, the survey sample was remarkably similar to the representative distribution of the population in each market with respect to age, gender, and region indicating that non-response bias was likely not an issue for this research.

Response rate

For the online survey, since a non-probability sample was used, a response rate cannot be calculated. The following table provides the participation rate for each country.

Participation rate calculation.

Disposition	Japan	Vietnam	South Korea	Philippines
Invalid Cases	291	181	92	65
Unresolved (U)	0	0	0	0
In-scope non-responding (IS)	0	0	0	0
Responding units (R)	2019	2478	1105	1155
Participation Rate=R/(R+IS+U)	87%	93%	92%	95%

Online survey cases can be broken down into four broad categories:

Invalid cases

These can include only clearly invalid cases (for example, invitations mistakenly sent to people who did not qualify for the study, or incomplete or missing email addresses in a client-supplied list).

Unresolved (U)

These include all the cases where it cannot be established whether the invitation was sent to an eligible or an ineligible respondent or unit (for example, when email invitations bounce back or remain without an answer before the candidate could be qualified).

In-scope non-responding (IS)

These include all refusals, either implicit or explicit, all non-contacts and early breakoffs of known eligible cases, and other eligible non-respondents (due to illness, leave of absence, vacation or other).

Responding units (R)

These include cases who have participated but who were disqualified afterwards (for example, when admissible quotas have been reached). It also includes all completed surveys or partially completed surveys that meet the criteria set by the researcher to be included in the analysis of the data.

Unresolved (U), in-scope (IS), and responding units (R) are all included in the broad category of “potentially eligible” cases. However, invalid cases are not included in the calculation of outcome rates.

For this survey, a router was used to screen potential respondents and assign them to one of the surveys from the router. The router is a platform used to distribute and manage surveys. This means that individuals who were not eligible to participate in this study because they did not meet the screening criteria would be sent to participate in other surveys that might have been available in the router at that point.

The router assignment precedes the actual survey, and given this, it is not possible to estimate the number of cases "invited" to participate and whether they were eligible or not. Therefore, it is not possible to estimate the "unresolved" cases. For this survey, responding units are broken out as follows.

Completions

Disposition	Japan	Vietnam	South Korea	Philippines
Over quota	171	607	34	31
Partial Completes	95	121	71	123
Qualified Completes	1,753	1,750	1,000	1,001
Responding units (R)	2,019	2,478	1,105	1,155

Questionnaires

Country: the Philippines (English)

Introduction

[ask in all markets]
Thank you for your interest in taking this survey. Agriculture and Agri-Food Canada (AAFC) has commissioned Ipsos, a market research firm, to conduct a public opinion survey. AAFC is interested in better understanding your food shopping habits and attitudes and impressions of Canadian foods.
Your participation is voluntary and completely confidential. Your answers will remain anonymous. The information you provide will be used for research purposes only and will be administered according to pertinent privacy legislation.
The survey will take about 10 minutes to complete depending on your responses.
If you have any questions about how to complete the survey or encountered any technical issues, please email [TBD].
Thank you in advance for your participation.

Demographic section

Pre-classification/Screener Section
' Ask: Japan/Philippines/South Korea/Vietnam
[Standard Screener: do not modify or translate]
Year/month. What is your date of birth?

Year
1910 1910

2015 2015
Month

1. January
2. February
3. March
4. April
5. May
6. June
7. July
8. August
9. September
10. October
11. November
12. December

' Ask: Hidden
[Standard Screener: do not modify or translate]
RESP_AGE [Hidden]. Hidden Question - RESP_AGE "this is a dummy question that will hold age"

USE RESP_AGE [Hidden] response list

' Ask: Hidden
[Standard Screener: do not modify or translate]
QUOTAGERANGE [Hidden]. Hidden Question - QUOTAGERANGE "this is a dummy question that will hold age breaks" for the quotas that should be defined by the PM; it can be edited, and lines can be added to meet survey objectives.

1. 20_24 "20-24",
2. 25_34 "25-34",
3. 35_44 "35-44",
4. 45_54 "45-54",
5. 55_65 "55-65"

Terminate if not more than 20 years and over 65 years

' Ask: Japan/Philippines/South Korea
[Standard Screener: do not modify or translate]
GENDER_NONBINARY. Are you…?

2. Female
1. Male
3. Another gender
4. Prefer not to answer

' Ask: Vietnam
[Standard Screener: do not modify or translate]
GENDER_NONBINARY _Custom Vietnam. Are you…?

2. Female
1. Male
3. Another gender
4. Prefer not to answer

' Ask: Japan
[Standard Screener: do not modify or translate]
QMktSize_JP. Where do you live?

1. Zip code(Example: 1050001)
2. State
3. City
4. Prefer not to answer

' Ask: Philippines
[Standard Screener: do not modify or translate]
QMktSize_PH. Where do you live?

1. Province
2. City/Municipality

' Ask: South Korea
[Standard Screener: do not modify or translate]
QMktSize_KR. Please select the place you live in:

1. Province

2. City/-Gun/-Gu

' Ask: Vietnam
[Standard Screener: do not modify or translate]
QMKTSIZE_VN. Where do you live?
1. City/Province:
2. District:
3. Subdistrict:

' Ask: Hidden
[Standard Screener: do not modify or translate]
[programmer notes]
JPSTDREGION [Hidden]. Hidden recodeJPSTDREGION from JPPOSTCODE and JPSTATE and JPCITY :
1. Hokkaido
2. Tohoku
3. Kanto
4. Chubu
5. Kansai
6. Chugoku
7. Shikoku
8. Kyushu / Okinawa

' Ask: Hidden
[Standard Screener: do not modify or translate]
[PH02TOWNNAME and PHPROVINCE Hidden Geo Fields - optional]
PHSTDREGION [Hidden]. Hidden recode PHSTDREGION from PHTOWNNAME
1. Luzon
2. Mindanao
3. Visayas

' Ask: Hidden
[Standard Screener: do not modify or translate]
[programmer notes]
KRSTDREGION [Hidden]. Hidden recode KRSTDREGION from KRSTATE and KRTownName:
1. Seoul
2. Gyeonggi and Gangwon
3. Gyeongsang
4. Jeolla
5. Chungcheong
6. Jeju

' Ask: Hidden
[Standard Screener: do not modify or translate]
[VNPROVINCE Hidden Geo Fields - optional]
VNSTDREGION [Hidden]. Hidden recode VNSTDREGION from VNPROVINCE, DISTRICT, SUBDISTRICT:
1. Central Highlands
2. Mekong River Delta
3. North Central Coast

4. South Central Coast
5. Northeast
6. Northwest
7. Red River Delta
8. South East

Q1.
Are you responsible, in total or in part, for shopping for food products in your household?

1. All or most of it
2. In part
3. No

[if no thank and terminate]

[ask in all markets]
We have a couple final questions for statistical classification purposes. Please indicate the answer that best describes you. Be assured that your responses will be held in strict confidence.

Q18.
Do you live in a …

1. large city
2. suburb of large city
3. in a small town
4. in a rural area

' Ask: Japan/Philippines/South Korea/Vietnam
[Standard Screener: do not modify or translate]
[PN: Not Required to access age/gender of other HH Members]
HHCMP10. How many people are living or staying at your current address? (Include yourself and any other adults or children who are currently living or staying at this address for at least two months)

1. 1
2. 2
3. 3
4. 4
5. 5
6. 6
7. 7
8. 8
9. 9
10. 10
11. 11
12. 12+

' Ask: Japan
[Standard Screener: do not modify or translate]

' Ask: Philippines/Vietnam
[Standard Screener: do not modify or translate]
[PN: if HHCMP10=1, then KIDS02+DKIDS02 not asked and assume no children in hhld.]
KIDS02. How many children under the age of 18 are living in your household? Please reference only the children for which you are the parent or legal guardian. (If there are no children under 18 in your household, please type 0)

' Ask: Japan
[Standard Screener: do not modify or translate]
[PN: JP01MAR should always be asked before KIDS02 and DKIDS02. If JP01MAR=1, then KIDS02 and DKIDS02 not asked. if HHCMP10=1, then KIDS02+DKIDS02 not asked and assume no children in hhld.]
KIDS02__. How many children under the age of 18 are living in your household? Please reference only the children for which you are the parent or legal guardian. (If there are no children under 18 in your household, please type 0)

' Ask: South Korea
[Standard Screener: do not modify or translate]
[PN: KR01MAR should always be asked before KIDS02 and DKIDS02. If KR01MAR=1, then KIDS02 and DKIDS02 not asked. if HHCMP10=1, then KIDS02+DKIDS02 not asked and assume no children in hhld.]
KIDS02_. How many children under the age of 19 are living in your household? Please reference only the children for which you are the parent or legal guardian. (If there are no children under 19 in your household, please type 0)

' Ask: Japan
[Standard Screener: do not modify or translate]
JP01INC. What is the combined total annual income (pre-tax) earned by all members of your household? [Please include all your income sources including: salaries, scholarships, pension and Social Security benefits, dividends from shares, income from rental properties, child support and alimony etc.]

1. Less than ¥1,000,000
2. ¥1,000,000 - ¥1,999,999
3. ¥2,000,000 - ¥2,999,999
4. ¥3,000,000 - ¥3,999,999
5. ¥4,000,000 - ¥4,999,999
6. ¥5,000,000 - ¥5,999,999
7. ¥6,000,000 - ¥6,999,999
8. ¥7,000,000 - ¥7,999,999
9. ¥8,000,000 - ¥8,999,999
10. ¥9,000,000 - ¥9,999,999
11. ¥10,000,000 - ¥10,999,999
12. ¥11,000,000 - ¥11,999,999
13. ¥12,000,000 - ¥12,999,999
14. ¥13,000,000 - ¥13,999,999
15. ¥14,000,000 - ¥14,999,999
16. ¥15,000,000 - ¥15,999,999
17. ¥16,000,000 - ¥16,999,999
18. ¥17,000,000 - ¥17,999,999
19. ¥18,000,000 - ¥18,999,999

20. ¥19,000,000 - ¥19,999,999
21. ¥20,000,000 以上
22. 99 Prefer not to answer

' Ask: Philippines
[Standard Screener: do not modify or translate]
PH02INC. Please indicate the monthly income of your household before taxes.

1. Below P 8,000
2. P 8,000 - 10,000
3. P 10,001 - 15,000
4. P 15,001 - 20,000
5. P 20,001 - 25,000
6. P 25,001 - 30,000
7. P 30,001 – 34,999
8. P 35,000 – 40,000
9. P 40,001 - 50,000
10. P 50,001 - 70,000
11. P 70,001 - 75,000
12. P 75,001 - 80,000
13. P 80,001 – 85,000
14. P 85,001 – 90,000
15. P 90,001 – 95,000
16. P 95,001 – 100,000
17. P 100,001 and above
18. Prefer not to answer

' Ask: South Korea
[Standard Screener: do not modify or translate]
KR01INC. What is the combined total annual income (pre-tax) earned by all members of your household? Please include all your income sources including: salaries, scholarships, pension and Social Security benefits, dividends from shares, income from rental properties, child support and alimony etc. We are not interested in the type of income source, only in the total annual income earned by all the members of your household together.

1. Less than 10,000,000 won
2. 10,000,000 ~ 19,999,999 won
3. 20,000,000 ~ 29,999,999 won
4. 30,000,000 ~ 39,999,999 won
5. 40,000,000 ~ 49,999,999 won
6. 50,000,000 ~ 59,999,999 won
7. 60,000,000 ~ 69,999,999 won
8. 70,000,000 ~ 79,999,999won
9. 80,000,000 ~ 89,999,999won
10. 90,000,000 ~ 99,999,999won
11. More than 100,000,000 won
12. Prefer not to answer

' Ask: Vietnam
[Standard Screener: do not modify or translate]

VN02INC. Could you tell me your approximate net household monthly income after tax, including income from all income sources such as salary, allowance, bonus, money from relatives, other incomes? Select only one

1. Below 6,500,000 VND
2. 6,500,001 - 10,500,000 VND
3. 10,500,001 - 15,000,000 VND
4. 15,000,001 - 20,000,000 VND
5. 20,000,001 - 30,000,000 VND
6. Above 30,000,000 VND
99. Don't know/ Prefer not to answer

' Ask: Japan
[Standard Screener: do not modify or translate]
JP01EDU. Which of the following is the highest level of education that you have achieved?

1. Lower Secondary Schools
2. Upper Secondary Schools
3. Upper secondary specialized training schools
4. Professional training colleges
5. Colleges of Technology
6. Junior Colleges
7. Universities
8. Graduate Schools

' Ask: Philippines
[Standard Screener: do not modify or translate]
PH02EDU. What is your level of educational attainment?

1. Some Elementary
2. Completed Elementary
3. Some High School
4. Completed High School
5. Some College
6. Has a Degree
7. Some Masters
8. Has Masters/Doctorate Degree

' Ask: South Korea
[Standard Screener: do not modify or translate]
KR01EDU. What is the highest level of formal education that you have completed?

1. None (incl. Preschool)
2. Elementary School
3. Middle school
4. High School
5. University (2,3 years)
6. University (4 years or more)
7. Grad School Master's Program
8. Grad School Ph.D Program

' Ask: Vietnam

[Standard Screener: do not modify or translate]
VN01EDU. What is the highest degree or level of school you have completed?
Select only one

1. Primary school and below
2. Lower secondary school
3. Upper secondary school
4. Vocational Schools
5. Colleges
6. Universities
7. Masters
8. Doctor

Buying habits section
[ask in all markets]
The following section will focus on your general shopping habits.

Q2.
In the past six months have you purchased food at any the following: Select all that apply.
[Make this list specific to major outlets in each market (i.e. Costco, Loblaws type places) and those that are potentially relevant to Canada Brand in each market] plus Add online retailers.
[Randomize/Select all that apply]

[ask in Japan only]

1. Aeon
2. Amazon
3. Costco Japan
4. Gyomu Supa
5. Isetan/Mitsukoshi
6. Ito-Yokado
7. Kinokuniya
8. Rakuten Ichiba
9. Seijo-Ishii
10. Takashimaya
11. Yahoo Marketplace

[ask in Vietnam only]

1. AceFoods
2. AEON
3. Big C
4. Coopmart
5. Emart
6. Homefarm
7. Lazada
8. Lottemart
9. MegaMarket
10. Shopee
11. Soi Bien

12. Tiki
13. TikTok Shop
14. Vinmart
15. WinMart
16. Zalo

[ask in South Korea only]
1. Costco
2. Coupang
3. Emart
4. Homeplus
5. Lotte Mart
6. Market Kurly
7. SSG.com

[ask in Philippines only]
1. 7-Eleven
2. Alfamart
3. AllDay
4. GoCart
5. Lazada
6. Marketplace by Rustan's
7. Mercury Drugstore
8. Metro / Metro Gaisano
9. Prince Hypermart
10. Puregold
11. Robinson's Supermarket
12. Savemore
13. Shopee
14. Shopwise
15. SM Hypermarket/Supermarket
16. Supre8 Grocery Warehouse
17. The Landmark
18. Walter Mart
19. Watson’s

[ask Q3 in Japan and Vietnam only][only ask if selected “Rakuten” or “Ichiba” in Japan or “Big C”, “Homefarm” or “Shopee” in Vietnam at Q5 otherwise skip]
Q3 .
When shopping for food online, do you recall seeing any Canadian food products?
1. Yes
2. No
3. Don’t know

[if yes at Q3 ask Q4, otherwise skip]
Q4 .
Which Canadian food products do you recall seeing? Select all that apply.

[Randomize]
1. Beef, pork, and other meat
2. Fish and seafood
3. Maple syrup and honey
4. Confectionary and snacks
5. Fruit and vegetables
6. Wine, beer, and other alcohol beverages
7. Natural health products
8. Another type of product
9. Don’t remember [anchor][mutually exclusive]

[if selected don’t remember at Q4 skip Q5, otherwise continue]
Q5.
And, did you purchase any of the Canadian food products you saw? Select all that apply
[insert items selected at Q4]

Q6.
Thinking about your food purchases in the past six months, whether at a grocery store, market or online, how frequently have you purchased a food product that you knew was from each of the following countries?

[rows][randomize]
1. Canada
2. United States
3. New Zealand
4. Australia
5. France

[scale]
1. Several times a month
2. Once or twice a month
3. Every two to three months
4. Every three to six months
5. Never
6. Don’t know

[if selected “never” or “don’t know” at Q6 for Canada skip Q7, otherwise continue]
Q7.
And, how frequently have you purchased each of the following foods from Canada in the past six months?

[select all that apply, randomize]
1. Beef, pork, and other meat
2. Fish and seafood
3. Maple syrup and honey
4. Confectionary and snacks
5. Fruit and vegetables
6. Wine, beer, and other alcohol beverages

7. Natural health products

[scale]
1. Several times a month
2. Once or twice a month
3. Every two to three months
4. Every three to six months
5. Never
6. Don’t know

[if selected “never” or “don’t know” for all items skip Q8, otherwise continue]
Q8.
Generally speaking, how satisfied or dissatisfied were you with the Canadian food product(s) you purchased?

1. Very satisfied
2. Somewhat satisfied
3. Neither satisfied nor dissatisfied
4. Somewhat dissatisfied
5. Very dissatisfied

Q9.
You indicated you were [insert response from Q8]. Why do you say that?
[open end]

Q10.
How could you tell these products were from Canada?

[select all that apply][randomize]
1. Maple Leaf symbol
2. “Made in Canada” label
3. Promoted as a Canadian product online
4. Promoted as a Canadian product in-store
5. Familiarity with brand name or producer
6. Other, please specify:
7. I assumed it was, but didn’t know sure [anchor][mutually exclusive]

Perception section
[ask in all markets]
The following section will focus on your general opinion about Canadian food products.
Q11.
When it comes to food, what is the first thing that comes to your mind when you think of Canada?
[Open end]

Q12 .
Please name up to three foods that you associate with being from Canada.
[open end and code in our category list]
Don’t know

Q13.
To what extent do you agree or disagree with each the following statements as it relates to Canadian food.
Canadian food is…

[randomize]
1. High quality
2. Sustainably produced
3. Safe
4. Diverse (i.e. range of food products)
5. Innovative
6. Trustworthy
7. Healthy
8. Expensive
9. Great tasting
10. Fresh

[scale]
1. Strongly agree
2. Somewhat agree
3. Neither agree nor disagree
4. Somewhat disagree
5. Strongly disagree
6. Don’t know

Q14.
To what extent would you say you are interested in buying food products from the following countries in the future?

[rows][randomize]
1. Canada
2. United States
3. New Zealand
4. Australia
5. France

[scale]
1. Very interested
2. Somewhat interested
3. Not very interested
4. Not at all interested
5. Don’t know

Media section/Influencer section

[ask in all markets]
The following section will focus on your information and media consumption.
Q15.
How frequently do you use each of the following social media platforms?

[randomize]
1. TikTok
2. YouTube
3. Instagram
4. Facebook

[scale]
1. Several times a day
2. Everyday or almost everyday
3. 2-3 times a week
4. Once a week
5. A couple times a month
6. Less often
7. Never

[ask in Japan and Vietnam only][only ask in Japan if didn't select never for Instagram or YouTube, only ask in Vietnam if didn't select never for TikTok or YouTube]
Q16.
Have you seen any content about Canadian food on the following platforms within the past six months?

[only include in Japan] Instagram, YouTube
[only include in Vietnam] TikTok, Instagram, YouTube, Facebook

Q17.
When it comes to cooking and food, where do you turn to for inspiration and/or to look for information on food and seafood?
[randomize/check all that apply]
1. Friends or family
2. Cooking shows on television
3. Lifestyle magazines who talk about food
4. Cookbooks you have at home
5. Google or other search engine
6. YouTube
7. [Vietnam only] Zalo
8. [Japan only] Line
9. [insert market] news outlets (physical newspapers or online)
10. International news outlets (physical newspapers or online)
11. Facebook
12. Pinterest
13. Instagram
14. TikTok
15. Other- Please specify:

16. None of the above [anchor][mutually exclusive]

Country: Japan

1. あなたは世帯で食品の買い物をすべて、または部分的に担当されていますか?

すべて、またはほぼ全部
一部
いいえ

本アンケートに関心をお寄せいただき、ありがとうございます。カナダ農業食糧省 (AAFC) の委託を受け、市場調査会社の Ipsos が世論調査を実施しています。AAFC は、あなたの食品の買い物習慣と姿勢、カナダ産食品の印象について理解を深めたいと思っています。

ご参加は強制ではありません。また完全に機密扱いです。いただいた回答は匿名のままです。ご提供いただいた情報は調査目的にのみ利用され、関連プライバシー法に則って管理されます。

アンケートの所要時間は、回答にもよりますが約 10 分ほどです。

アンケートの回答方法に関する質問、または技術的問題に直面された場合には、[TBD] までメールでご連絡ください。

ご協力の程、どうぞ宜しくお願い申し上げます。

ここからは、一般的な買い物習慣についてお伺いします。

2. この 6 か月間に食品を購入された場所を次からお選びください。当てはまるものすべてをお選びください

[ask in Japan only]

1. イオン
2. コストコ
3. イトーヨーカドー
4. 業務スーパー
5. 成城石井
6. 紀ノ国屋

7. 高島屋
8. 伊勢丹 / 三越
9. 楽天市場
10. アマゾン
11. Yahoo! ショッピング

[ask in Vietnam only]

1. Big C
2. Vinmart
3. WinMart
4. MegaMarket
5. Emart
6. Lottemart
7. Coopmart
8. AEON
9. AceFoods
10. Homefarm
11. Soi Bien
12. Shopee
13. TikTok Shop
14. Lazada
15. Tiki
16. Zalo

[ask in South Korea only]

1. Lotte Mart
2. Homeplus
3. Emart
4. SSG.com
5. Costco
6. Coupang
7. Market Kurly

3. 食品をインターネットで購入される際に、カナダ産食品を見かけた覚えがありますか?

1. はい
2. いいえ
3. わからない

4. 見かけた覚えのあるカナダ産食品をお答えください。当てはまるものすべてをお選びください。

1. 牛肉、豚肉、その他の肉類
2. 魚、シーフード
3. メープルシロップ、蜂蜜
4. お菓子、スナック
5. 果物、野菜

6. ワイン、ビール、その他のアルコール飲料
7. 自然健康食品
8. その他の種類の商品
9. 覚えていない [anchor][mutually exclusive]

5. また、ご覧になったカナダ産食品を購入されましたか?当てはまるものすべてをお選びください

6. この 6 か月間の食品購入についてお考えください。食料品店、市場、またはオンラインで、次の国産だとわかっている食品を購入した頻度をお答えください。

1. カナダ
2. 米国
3. ニュージーランド
4. オーストラリア
5. フランス

1. 月に数回
2. 月に 1、2 回
3. 2、3 か月に 1 回
4. 3〜6 か月に 1 回
5. 買った事はない
6. わからない

7. また、この 6 か月に次の各カナダ産食品を購入された頻度をお答えください。

1. 牛肉、豚肉、その他の肉類
2. 魚、シーフード
3. メープルシロップ、蜂蜜
4. お菓子、スナック
5. 果物、野菜
6. ワイン、ビール、その他のアルコール飲料
7. 自然健康食品

1. 月に数回
2. 月に 1、2 回
3. 2、3 か月に 1 回
4. 3〜6 か月に 1 回
5. 買った事はない
6. わからない

8. 概して、ご購入されたカナダ産食品の満足度をお答えください。

1. 非常に満足

2. ある程度満足
3. どちらとも言えない
4. やや不満
5. 非常に不満

9. [insert response from Q8]だとお答えになりました。 理由をお聞かせください。

10. それらの商品がカナダ産であると、何でわかりましたか?

1. カエデの葉のマーク
2. 「カナダ産」のラベル
3. オンラインでカナダ産だとプロモーションしていた
4. 店舗でカナダ産だとプロモーションしていた
5. ブランド名や生産者になじみがある
6. その他、具体的にお答えください：
7. そう思ったけれども、確かではない

ここからのセクションでは、カナダ産食品に関するあなたの一般的なご意見を伺います。

11. 食品に関して言うと、カナダと聞いて最初に思い浮かぶものは何ですか?

12. カナダに関連して思い浮かぶ食品を最大 3 つまでお答えください。

わからない

13. カナダ産食品に関する次の各文にどの程度同意または反対なさいますか?

カナダ産食品は…

1. 高品質
2. サステナブルな生産
3. 安全
4. 多様（食品の種類）
5. 革新的
6. 信用できる
7. 健康的
8. 高価
9. 美味しい
10. 新鮮

1. 強く同意する
2. やや同意する

3. どちらとも言えない
4. やや反対する
5. 強く反対する
6. わからない

14. 将来、次の国産の食品を購入することにどの程度興味がありますか?

1. カナダ
2. 米国
3. ニュージーランド
4. オーストラリア
5. フランス

1. 非常に興味がある
2. やや興味がある
3. あまり興味がない
4. まったく興味がない
5. わからない

ここからのセクションでは、あなたの情報とメディアの消費についてお伺いします。

15. 次の各ソーシャルメディア・プラットフォームの利用頻度をお答えください。

1. TikTok (ティックトック)
2. YouTube (ユーチューブ)
3. Instagram (インスタグラム)
4. Facebook (フェイスブック)

[scale]
1. 1 日に複数回
2. 毎日またはほぼ毎日
3. 週 2〜3 回
4. 週に 1 回
5. 年に 2、3 回
6. それより少ない
7. 使った事がない

16. この 6 か月に、カナダ産食品についてのコンテンツを次のプラットフォーム内で見かけたことがありますか?

[only include in Japan] Instagram (インスタグラム)、YouTube (ユーチューブ)
[only include in Vietnam] TikTok, Instagram, YouTube, Facebook

17. 料理や食品に関してどこからインスピレーションを得ますか? また食品やシーフードに関する情報をどこで探しますか?

1. 友人や家族
2. テレビの料理番組
3. 食品に関する記事が掲載されているライフスタイル雑誌
4. 家庭にある料理本
5. Google またはその他の検索エンジン
6. YouTube (ユーチューブ)
7. [vietnam only] Zalo
8. line (ライン)
9. [insert market]の報道 (新聞やインターネット)
10. 国際的な報道 (新聞やインターネット)
11. Facebook (フェイスブック)
12. Pinterest (ピンタレスト)
13. Instagram (インスタグラム)
14. TikTok (ティックトック)
15. その他 (具体的にお答えください)
16. 上記のいずれも該当しない [anchor][mutually exclusive]

最後に数問、統計目的でお伺いします。ご自身に最もよく当てはまるものをお答えください。回答は極秘扱いですのでご安心ください。

18. お住まいの場所は…

1. 大都市
2. 大都市の郊外
3. 小さな町
4. 村落

Country: South Korea

1. 귀하는 가정에서 식품 장보기를 (전적으로 또는 일부분) 담당하고 계십니까?

전체 또는 대부분

일부분

아니요

이 설문조사에 응해 주셔서 감사합니다. 캐나다 농업 및 농업 식품부(Agriculture and Agri-Food Canada, AAFC)에서는 시장 조사 전문 기업인 Ipsos에 여론 조사 실시를 의뢰했습니다. AAFC는 귀하의 식품 장보기 습관이나 태도, 캐나다산 식품에 대한 인상 등을 알아보고자 합니다.

참여 여부는 자발적이며, 철저히 기밀을 엄수합니다. 답변은 익명 처리됩니다. 제공해 주신 정보는 연구 목적으로만 사용되며 관련 개인정보보호법에 따라 관리됩니다.

설문조사는 귀하의 답변 내용에 따라 마치는 데 약 10분이 걸립니다.

설문조사 작성 방법과 관련해 궁금한 점이 있거나, 기술적인 문제가 발생한 경우 이메일 [TBD](으)로 문의해 주시기 바랍니다.

참여해 주셔서 미리 감사드립니다.

다음 섹션에서는 귀하의 전반적인 쇼핑 습관을 주로 다룹니다.

2. 지난 6개월간 다음 보기에 주어진 장소에서 식품을 구매한 적이 있습니까? 해당하는 사항을 모두 선택하십시오.

[ask in Japan only]
1. Aeon
2. Costco Japan
3. Ito-Yokado
4. Gyomu Supa
5. Seijo-Ishii
6. Kinokuniya
7. Takashimaya
8. Isetan/Mitsukoshi
9. Rakuten Ichiba
10. Amazon
11. Yahoo Marketplace

[ask in Vietnam only]
1. Big C
2. Vinmart
3. WinMart
4. MegaMarket
5. Emart
6. Lottemart
7. Coopmart

8. AEON
9. AceFoods
10. Homefarm
11. Soi Bien
12. Shopee
13. TikTok Shop
14. Lazada
15. Tiki
16. Zalo

[ask in South Korea only]

1. 롯데마트
2. 홈플러스
3. 이마트
4. SSG.com
5. 코스트코
6. 쿠팡
7. 마켓컬리

3. 온라인에서 식품을 구매할 때, 캐나다산 식품을 본 적이 있습니까?
   1. 예
   2. 아니요
   3. 모르겠다

4. 본 적이 있는 캐나다산 식품은 무엇입니까? 해당하는 항목을 모두 선택해 주십시오.

   1. 쇠고기, 돼지고기, 기타 육류
   2. 생선 및 해산물
   3. 메이플시럽, 꿀
   4. 제과, 간식
   5. 과일, 채소
   6. 와인, 맥주, 기타 주류
   7. 천연재료 건강식품
   8. 다른 유형의 식품
   9. 기억 안 남 [anchor][mutually exclusive]

5. 캐나다산 식품을 본 적이 있다면, 그러한 식품을 구매하셨습니까? 해당하는 사항을 모두 선택하십시오.

6. 지난 6개월간의 식품 구매 이력을 돌아보십시오. 식료품점, 전통 시장, 온라인 어디든 관계없이, 다음 보기에 주어진 각 국가가 원산지임을 알고 식품을 구매한 적이 얼마나 자주 있습니까?

1. 캐나다
2. 미국
3. 뉴질랜드
4. 호주
5. 프랑스

1. 한 달에 여러 번
2. 한 달에 한두 번
3. 두세 달에 한 번
4. 3~6개월에 한 번
5. 전혀 안 함
6. 모르겠다

7. 지난 6개월간 다음 보기에 주어진 캐나다산 식품을 얼마나 자주 구매하셨습니까?

1. 쇠고기, 돼지고기, 기타 육류
2. 생선 및 해산물
3. 메이플시럽, 꿀
4. 제과, 간식
5. 과일, 채소
6. 와인, 맥주, 기타 주류
7. 천연재료 건강식품

1. 한 달에 여러 번
2. 한 달에 한두 번
3. 두세 달에 한 번
4. 3~6개월에 한 번
5. 전혀 안 함
6. 모르겠다

8. 구매하신 캐나다산 식품에 일반적으로 얼마나 만족하거나 불만족하셨습니까?

1. 매우 만족함
2. 꽤 만족함
3. 만족하지도 불만족하지도 않음
4. 다소 불만족함
5. 매우 불만족함

9. [insert response from Q8](이)라고 하셨습니다. 그 이유는 무엇입니까?

10. 이러한 제품이 캐나다산이라는 것을 무엇을 보고 아셨습니까?

1. 단풍잎 기호
2. "Made in Canada" 라벨
3. 온라인에서 캐나다산 제품으로 홍보됨
4. 매장에서 캐나다산 제품으로 홍보됨
5. 친숙한 브랜드 이름이나 생산자
6. 기타(구체적으로 기재)
7. 그럴 거라고 짐작은 했지만 확실히는 몰랐음 [anchor][mutually exclusive]

다음 섹션에서는 캐나다산 식품에 관한 귀하의 전반적인 견해를 주로 다룹니다.

11. 식품이라는 주제에 한해, 캐나다라는 말을 들으면 제일 먼저 무엇이 떠오릅니까?

12. 캐나다산이라고 인식하는 음식을 3개까지 예를 들어 주십시오.

모르겠다

13. 다음 보기에 주어진 캐나다산 식품 관련 문장에 얼마나 동의하거나 동의하지 않는지 표시해 주십시오.

캐나다산 식품은...

1. 품질이 좋다
2. 지속 가능한 방식으로 생산된다
3. 안전하다
4. 다양하다(즉, 식품 종류가 많음)
5. 혁신적이다
6. 신뢰할 수 있다
7. 건강하다
8. 비싸다
9. 맛이 좋다
10. 신선하다

1. 매우 동의
2. 다소 동의
3. 동의하지도 반대하지도 않음
4. 다소 반대
5. 매우 반대
6. 모르겠다

14. 앞으로 다음 보기에 주어진 국가가 원산지인 식품을 구매하는 데 어느 정도로 관심이 있는지 표시해 주십시오.

1. 캐나다
2. 미국
3. 뉴질랜드
4. 호주
5. 프랑스

1. 매우 관심 있음
2. 다소 관심 있음
3. 별로 관심 없음
4. 전혀 관심 없음
5. 모르겠다

다음 섹션에서는 귀하의 정보 및 미디어 소비를 주로 다룹니다.

15. 다음 보기에 주어진 소셜 미디어 플랫폼을 얼마나 자주 이용하십니까?

1. 틱톡(TikTok)
2. 유튜브(YouTube)
3. 인스타그램(Instagram)
4. 페이스북(Facebook)

[scale]

1. 하루에 여러 번
2. 매일 또는 거의 매일
3. 일주일에 2~3번
4. 일주일에 한 번
5. 한 달에 두어 번
6. 더 낮은 빈도
7. 전혀 안 함

16. Have you seen any content about Canadian food on the following platforms within the past six months?

[only include in Japan] Instagram, YouTube
[only include in Vietnam] TikTok, Instagram, YouTube, Facebook

17. 요리나 식품과 관련하여, 식품이나 해산물에 관한 아이디어를 얻거나 정보를 찾으려면 주로 어느 출처를 이용하십니까?

1. 친구나 가족
2. 텔레비전 요리 프로그램
3. 식품을 주제로 다루는 라이프스타일 매거진
4. 집에 가지고 있는 요리책
5. 구글(Google) 또는 기타 검색 엔진
6. 유튜브(YouTube)
7. [Vietnam only] zalo
8. [Japan only] Line
9. [insert market] 언론 매체(실물 신문, 온라인 버전)
10. 국제 언론 매체(실물 신문, 온라인 버전)
11. 페이스북(Facebook)
12. 핀터레스트(Pinterest)

13. 인스타그램(Instagram)
14. 틱톡(TikTok)
15. 기타(구체적으로 기재)
16. 해당 사항 없음 [anchor][mutually exclusive]

마지막으로 통계 분류 목적으로 몇 가지 질문을 드리겠습니다. 귀하의 실제 상황과 가장 가까운 답변이 무엇인지 표시해 주십시오. 답변은 엄격히 기밀을 준수하니 안심하셔도 됩니다.

18. 현재 어떤 유형의 지역에 거주하십니까?

1. 대도시
2. 대도시 교외
3. 소도시
4. 농촌 지역

Country: Vietnam

1. Bạn có phụ trách, toàn phần hoặc một phần, việc mua sắm thực phẩm trong gia đình không?

Toàn phần hoặc phần lớn
Một phần
Không

Cảm ơn bạn đã quan tâm đến khảo sát này. Sở Nông Nghiệp và Nông Sản Canada (AAFC) đã hợp tác với Ipsos, là một tổ chức chuyên về nghiên cứu thị trường, để triển khai khảo sát trưng cầu dân ý. AAFC luôn muốn được hiểu rõ hơn về thói quen mua thực phẩm của bạn cũng như thái độ và ấn tượng của bạn về các mặt hàng thực phẩm Canada.

Bạn tham gia trên cơ sở tự nguyện và được bảo mật hoàn toàn. Chúng tôi ẩn danh câu trả lời của bạn. Thông tin bạn cung cấp sẽ chỉ được sử dụng cho nghiên cứu và được quản lý theo luật bảo vệ quyền riêng tư thích hợp.

Khảo sát chỉ cần 10 phút là hoàn thiện tùy vào câu trả lời của bạn.

Nếu cần hỏi về cách làm khảo sát hoặc nếu gặp bất kỳ trục trặc nào về kỹ thuật, vui lòng gửi email tới [TBD].

Xin cảm ơn bạn trước vì đã tham gia.

Phần dưới đây sẽ tập trung vào các thói quen mua sắm chung.

2. Trong sáu tháng qua, bạn có mua thực phẩm tại bất kỳ điểm đến nào sau đây không? Chọn tất cả phương án thích hợp

[ask in Japan only]

1. Aeon
2. Costco Japan
3. Ito-Yokado
4. Gyomu Supa
5. Seijo-Ishii
6. Kinokuniya
7. Takashimaya
8. Isetan/Mitsukoshi
9. Rakuten Ichiba
10. Amazon
11. Yahoo Marketplace

[ask in Vietnam only]

1. Big C
2. Vinmart
3. WinMart
4. MegaMarket
5. Emart
6. Lottemart
7. Coopmart
8. AEON
9. AceFoods
10. Homefarm
11. Soi Bien
12. Shopee
13. TikTok Shop
14. Lazada
15. Tiki
16. Zalo

[ask in South Korea only]

1. Lotte Mart
2. Homeplus
3. Emart
4. SSG.com
5. Costco
6. Coupang

7. Market Kurly

3. Khi mua thực phẩm trực tuyến, bạn có nhớ là đã nhìn thấy thực phẩm Canada nào không?
   1. Có
   2. Không
   3. Không biết

4. Bạn nhớ là đã nhìn thấy thực phẩm Canada nào? Lựa chọn tất cả phương án phù hợp.

   1. Thịt bò, thịt lợn và thịt khác
   2. Cá và hải sản
   3. Si-rô cây phong và mật ong
   4. Bánh kẹo và bim bim
   5. Rau và quả
   6. Rượu, bia và đồ uống có cồn khác
   7. Sản phẩm sức khỏe tự nhiên
   8. Loại sản phẩm khác
   9. Không nhớ [anchor][mutually exclusive]

5. Và bạn có từng mua thực phẩm Canada bất kỳ khi nhìn thấy không? Chọn tất cả phương án thích hợp

6. Hãy nghĩ đến những lần mua thực phẩm trong 6 tháng qua, dù là ở cửa hàng tạp hóa, chợ hay trang web trực tuyến, bạn mua thực phẩm mà bạn biết là có xuất xứ từ các quốc gia dưới đây thường xuyên như thế nào?

   1. Canada
   2. Mỹ
   3. New Zealand
   4. Úc
   5. Pháp

   1. Vài lần mỗi tháng
   2. Một hoặc hai lần mỗi tháng
   3. Hai đến ba tháng một lần
   4. Ba đến sáu tháng một lần
   5. Chưa bao giờ
   6. Không biết

7. Và trong 6 tháng qua, bạn mua từng loại thực phẩm dưới đây từ Canada thường xuyên như thế nào?

   1. Thịt bò, thịt lợn và thịt khác
   2. Cá và hải sản
   3. Si-rô cây phong và mật ong

4. Bánh kẹo và bim bim
5. Rau và quả
6. Rượu, bia và đồ uống có cồn khác
7. Sản phẩm sức khỏe tự nhiên

1. Vài lần mỗi tháng
2. Một hoặc hai lần mỗi tháng
3. Hai đến ba tháng một lần
4. Ba đến sáu tháng một lần
5. Chưa bao giờ
6. Không biết

8. Nhìn chung, bạn hài lòng hoặc thất vọng như thế nào với (các) thực phẩm Canada đã mua?

1. Rất hài lòng
2. Hơi hài lòng
3. Không hài lòng cũng không thất vọng
4. Hơi thất vọng
5. Rất thất vọng

9. Bạn nói mình [insert response from Q8]. Tại sao bạn lại nói như vậy?

10. Làm sao bạn có thể biết rằng các sản phẩm này đến từ Canada?

1. Biểu tượng lá phong
2. Nhãn "Sản xuất tại Canada"
3. Được quảng cáo trực tuyến là sản phẩm Canada
4. Được quảng cáo tại cửa hàng là sản phẩm Canada
5. Biết nhãn hiệu hoặc nhà sản xuất
6. Khác, vui lòng nêu rõ:
7. Tôi đoán thế chứ không chắc chắn [anchor][mutually exclusive]

Phần dưới đây tập trung vào ý kiến chung của bạn về các loại thực phẩm Canada.

11. Nói về thực phẩm, bạn sẽ nghĩ đến thứ gì đầu tiên khi nhớ đến Canada?

12. Vui lòng nêu tên tối đa ba loại thực phẩm mà bạn biết đến từ Canada?

Không biết

13. Bạn đồng hoặc không đồng ý như thế nào với các nhận định dưới đây liên quan đến thực phẩm Canada.

1. Thực phẩm Canada...

2. Chất lượng cao
3. Sản xuất bền vững
4. An toàn
5. Đa dạng (nhiều loại thực phẩm)
6. Mới mẻ
7. Đáng tin cậy
8. Lành mạnh
9. Đắt đỏ
10. Vị ngon
11. Tươi

1. Hoàn toàn đồng ý
2. Hơi đồng ý
3. Không đồng ý cũng không phản bác
4. Hơi không đồng ý
5. Hoàn toàn không đồng ý
6. Không biết

14. Bạn quan tâm như thế nào đến việc mua các thực phẩm đến từ các quốc gia sau đây trong tương lai?

1. Canada
2. Mỹ
3. New Zealand
4. Úc
5. Pháp

1. Rất quan tâm
2. Hơi quan tâm
3. Không quan tâm lắm
4. Không hề quan tâm
5. Không biết

Phần dưới đây tập trung vào thông tin và thời lượng sử dụng phương tiện truyền thông của bạn.

15. Bạn sử dụng các mạng xã hội dưới đây thường xuyên như thế nào?

1. TikTok
2. YouTube
3. Instagram
4. Facebook

[scale]

1. Vài lần mỗi ngày
2. Hàng ngày hoặc hầu như hàng ngày
3. 2-3 lần một tuần

4. Mỗi tuần một lần
5. Vài lần mỗi tháng
6. Ít hơn
7. Chưa bao giờ

16. Bạn có từng thấy nội dung về thực phẩm Canada ở các trang mạng sau đây trong vòng sáu tháng qua không?

[only include in Japan] Instagram, YouTube
[only include in Vietnam] TikTok, Instagram, YouTube, Facebook

17. Nói về việc chế biến và thực phẩm, bạn tìm đến đâu để lấy cảm hứng và/hoặc tìm thông tin về thực phẩm và hải sản?

1. Bạn bè hoặc gia đình
2. Chương trình ẩm thực trên tivi
3. Tạp chí lối sống có nội dung về ẩm thực
4. Sách nấu ăn tại nhà
5. Google hoặc công cụ tìm kiếm khác
6. YouTube
7. [Vietnam only] Zalo
8. [Japan only] Line
9. [insert market] các kênh thông tin (báo in hoặc trực tuyến)
10. Kênh thông tin quốc tế (báo in hoặc trực tuyến)
11. Facebook
12. Pinterest
13. Instagram
14. TikTok
15. Khác- vui lòng nêu rõ:
16. Không có phương án nào ở trên [anchor][mutually exclusive]

Chúng tôi có vài câu hỏi để phục vụ cho quá trình phân loại thống kê. Vui lòng chỉ định câu trả lời đúng nhất với bạn. Xin yên tâm rằng các câu trả lời của bạn được bảo mật nghiêm ngặt.

18. Bạn sống tại …

1. thành phố lớn
2. khu ngoại ô của thành phố lớn
3. thị trấn nhỏ
4. vùng nông thôn