

Comparative report on healthy food study in Thailand, Indonesia and Vietnam in 2015

January 2015

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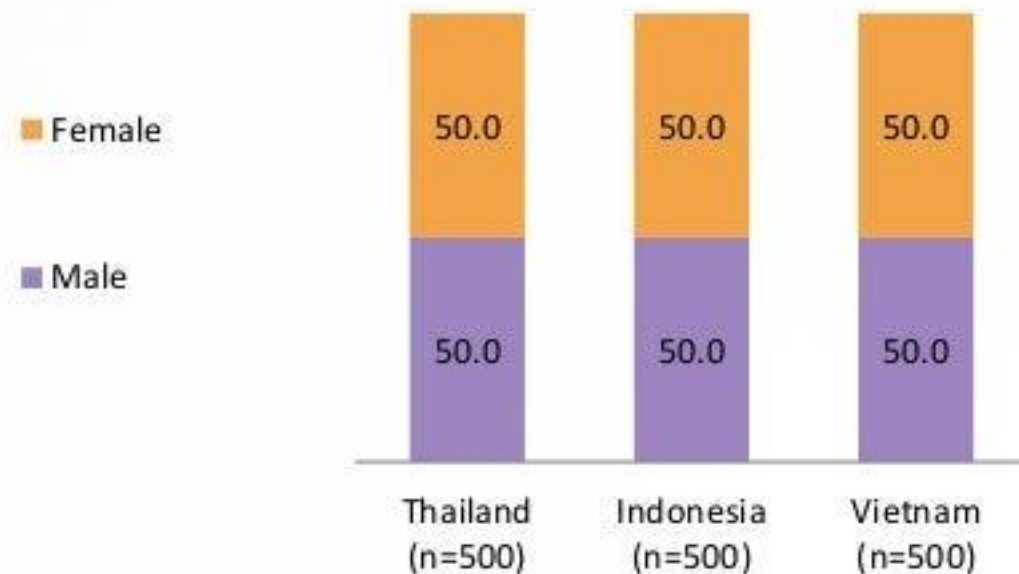
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A. Research design

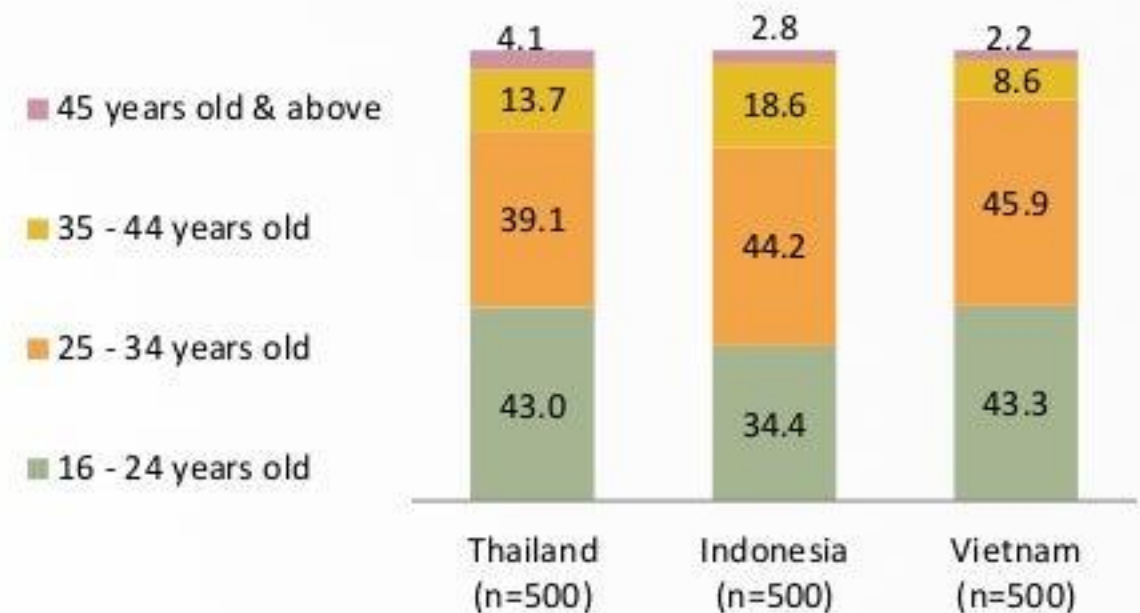
Research Method	Online research
Fieldwork Period	May 2015
Research Area	Vietnam, Indonesia, Thailand
Respondent Criteria	Male / Female, 18 years old and above
Sample Size	Thailand (n=500) Indonesia (n=500) Vietnam (n=500)
Number of Questions	30 Main Questions
Survey Content	General attitude about ready to eat healthy food Ready to eat healthy food Habits Ready to eat healthy Food Awareness Ready to eat healthy food improvement & key trends Ready to eat healthy food segment

B. Respondent profile

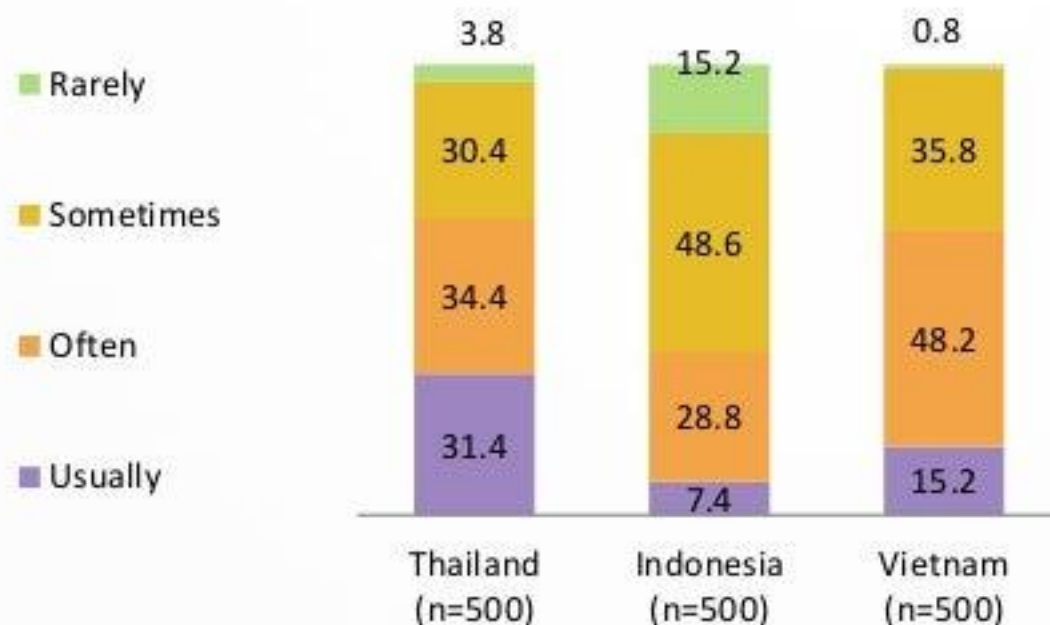
Gender



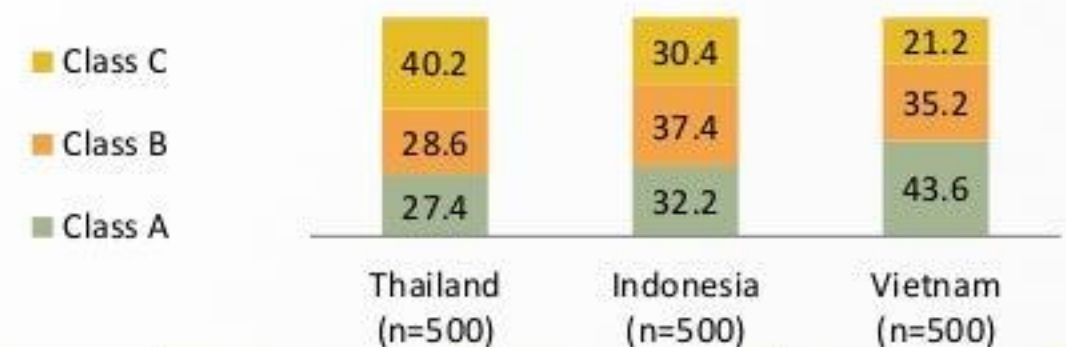
Age



Ready to eat Healthy Food Purchasing Behavior



Monthly household income



Definition	Thailand	Indonesia	Vietnam
Class A	> 50,001 THB	> 8.5 mil IDR	> 15 mil VND
Class B	24,001 – 35,000 THB	3.5 mil – 8.5 mil IDR	7.5 mil - 15 mil VND
Class C	< 24,000 THB	< 3.5 mil IDR	< 7.5 mil VND

C. Key findings

■ General attitude about RTE healthy food

- Healthy dairy & yogurt drink are the most popular category for all 3 countries. Besides that, fat – free food and low caffeine coffee are common in Thailand, healthy snack is in Indonesia, while Fortified/ functional beverage and high nutrition noodles/ rice is more consumed in Vietnam than other foods.
- Functional for health & wellness as a major concern of Thai people, Indonesian and Vietnamese. Source of fibre, high nutrition and protein is the top concerns among Thai people. Besides that, Indonesian and Vietnamese have some other concerns including digestive and Cholesterol free.

■ RTE healthy food Habits

- While the majority of Thai & Indonesia consume RTE healthy food more than once per week (44.0%). The majority of Vietnam respondents are purchasing 2-3 times/month (34.6%) and the minority consume everyday (29.0%)
- The majority of Thai, Indonesia and Vietnam are spending at moderate spending for one time purchasing
- Nutrients benefit & advertisement encouragement are the key factors to purchase healthy food among 3 countries. Besides that, convenient as meal is also the key factor to consider to purchase healthy food for Indonesian & Vietnamese, while taste belongs to the top consideration for Thai people.
- While convenience store is the main channel for Thai & Indonesian people, but it's not the main channel at all in Vietnam. The main channel to purchase RTE healthy food is dominated by supermarket in Vietnam. While healthy food store is the third alternative place for Thailand and Vietnam, yet it does not play role at all in Indonesia.

C. Key findings

■ RTE healthy Food Awareness

- Personal health is the top motivation to consume healthy food among people living in those 3 countries. Cholesterol is the top priority among 2 countries respondents in Thailand and Indonesia. In addition, alternative food is the top trigger for Indonesian use healthy food, while some benefits including innovation, convenience are in Vietnam.
- Information source for healthy food is the same in those 3 countries. Advertising on TV, Internet and healthy shop/supermarket are the top 3 information sources for Indonesians, Thai people and Vietnamese.
- Father/Mother has played a major role a RTE healthy food influencers for the majority of respondents in 3 countries. While the 2nd influencers for Indonesian is brother/sister (39.8%); for Vietnam is relatives (34.2%) and for Thailand is husband/wife (20.9%).

■ RTE healthy food improvement & key trends

- The level of RTE healthy food innovation is considered to be high in Thailand, proven by number of votes by Thai (46.2%) and another significant half vote for the level of moderate innovation (41.3%). However, the significant majority of Vietnamese (47.0%) vote for lesser development for RTE healthy innovation. The same trend happens for Indonesia with lesser percentage vote for the category (29.6%).
- The high innovation and improvement in Thailand can be proven by the example of RTE healthy meal which is not yet available in Indonesia & Vietnam. For Indonesia, Healthy Snack bar is getting popular, while RTD healthy functional drink is on trend in Vietnam
- Due to the high level innovative & improvement in healthy food Thailand market, therefore, the market is dominated by local brands. However, Global and local brand is equally dominated in healthy market in Indonesia & Vietnam.

C. Key findings

■ RTE healthy food lifestyle & attitude

- Despite the vote for high innovation for RTE healthy food in Thailand, the majority of Thai respondents (34.4%) started to consume RTE healthy food recently for the last period of 6 months. The highest percentage of 23.4% Indonesian respondents consumed RTE healthy food for more than 5 years ago, while around 20.8% Vietnamese consume RTE healthy food in the mentioned period. Around one-third of Vietnamese respondents (30.0%) started having RTE healthy food consumption for 1- 2 years.
- The similar trend for healthy lifestyle attitude happens for Indonesia (61.0%) and Vietnam (60.9%) particularly on work-life balance, most of Thai respondents are focusing on health care (71.5%) particularly on stress control lifestyle (83.2%).
- The percentage of positive aspect is highest of all RTE healthy food attitude among 3 countries, and particularly higher in Thailand (77.0%), yet the percentage of negative aspect is also high in Thailand (70.5%) because of the expensive price in Thailand that 71.8% of respondents vote for the reason. The percentage of negative aspect for Indonesia and Vietnam is considerably low and significant lower than Thailand

D. Detail findings

- 1. General attitude about RTE healthy food**
2. RTE healthy Food Awareness
3. RTE healthy food Habits
4. RTE healthy food improvement & key trends
5. RTE healthy food lifestyle & attitude

Popular RTE healthy food category

Q1. Please tell us which category do you consume for ready to eat healthy food ? [MA]

- Healthy dairy & yogurt drink are the most popular category for all 3 countries
- Besides that, fat – free food and low caffeine coffee are common in Thailand, healthy snack is in Indonesia, while Fortified/ functional beverage and high nutrition noodles/ rice is more consumed in Vietnam than other foods.

Thailand (n=500)

Healthy dairy; Yogurt cup & drink	77.7
Fat-free food	52.1
Low caffeine coffee & High...	41.1
Healthy dried processed food/fruit	39.4
Healthy canned and preserved...	38.9
Healthy chilled processed...	37.5
Healthy sauces, dressings and...	37.1
Healthy snack bars/ Cereal bars	32
Ready to eat healthy meals	29.6
Fortified / Functional Beverage	28.4
Healthy frozen processed food	24.1
High nutrition noodles/Rice;...	24.1
Healthy Soups; for ex; 100% real...	22.7
Healthy sweet and savoury snacks	17

Indonesia (n=500)

Healthy dairy; Yogurt cup & drink	74.6
Healthy snack bars/ Cereal bars	54.2
Healthy sweet and savoury snacks	51.6
Low caffeine coffee & High...	36.8
High nutrition noodles/Rice;...	36.2
Fortified / Functional Beverage	31.2
Healthy chilled processed...	29
Healthy sauces, dressings and...	27.6
Ready to eat healthy meals	26.8
Healthy frozen processed food	26
Healthy dried processed food/fruit	23.8
Healthy canned and preserved...	21.6
Healthy Soups; for ex; 100% real...	17.2
Fat-free food	17

Vietnam (n=500)

Healthy dairy; Yogurt cup & drink	85
Fortified / Functional Beverage	74.4
High nutrition noodles/Rice;...	56.4
Healthy snack bars/ Cereal bars	51.6
Healthy canned and preserved...	46
Low caffeine coffee & High...	39
Healthy sweet and savoury snacks	38.8
Healthy dried processed food/fruit	29.8
Healthy chilled processed...	29.2
Healthy sauces, dressings and...	29.2
Fat-free food	27.8
Healthy Soups; for ex; 100% real...	19.8
Healthy frozen processed food	18.8
Other ready to eat healthy food	14.8

* Ready to eat healthy food category

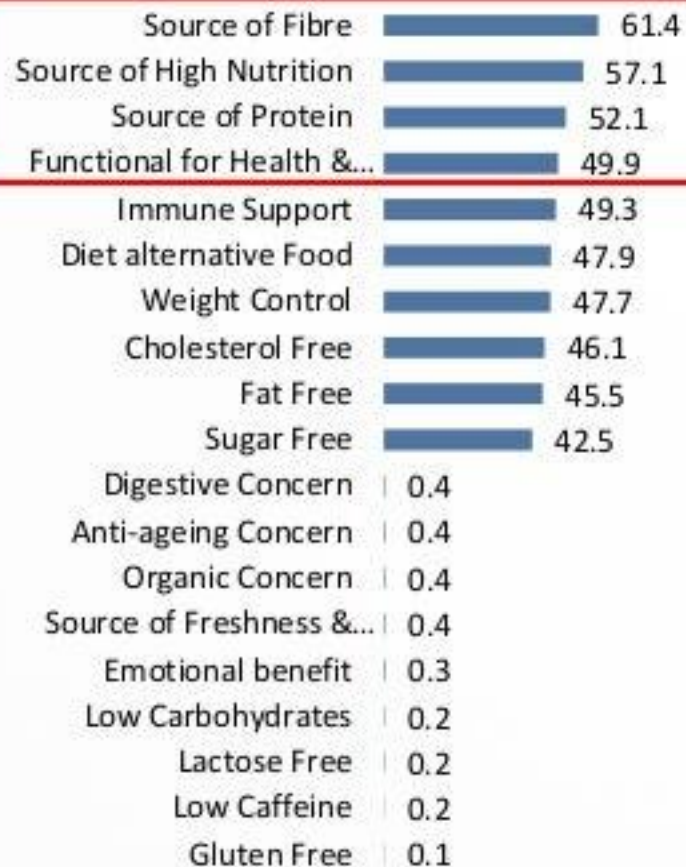
(Unit: %)

RTE healthy food concern

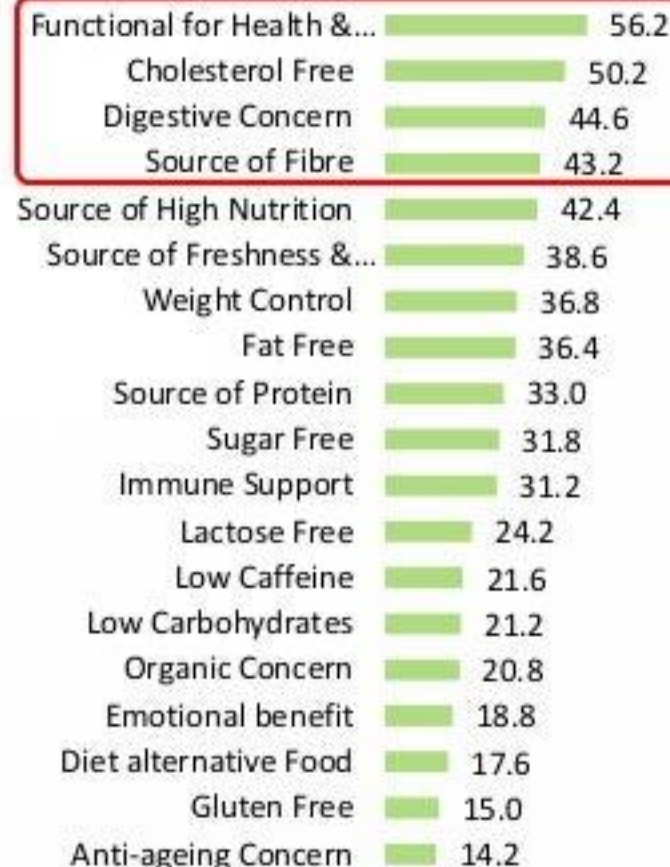
Q5 Please tell us in which aspect you are mostly concerned on healthy food aspects ? [MA]

- Functional for health & wellness as a major concern of Thai people, Indonesian and Vietnamese.
- Source of fibre, high nutrition and protein is the top concerns among Thai people. Besides that, Indonesian and Vietnamese have some other concerns including digestive and Cholesterol free.

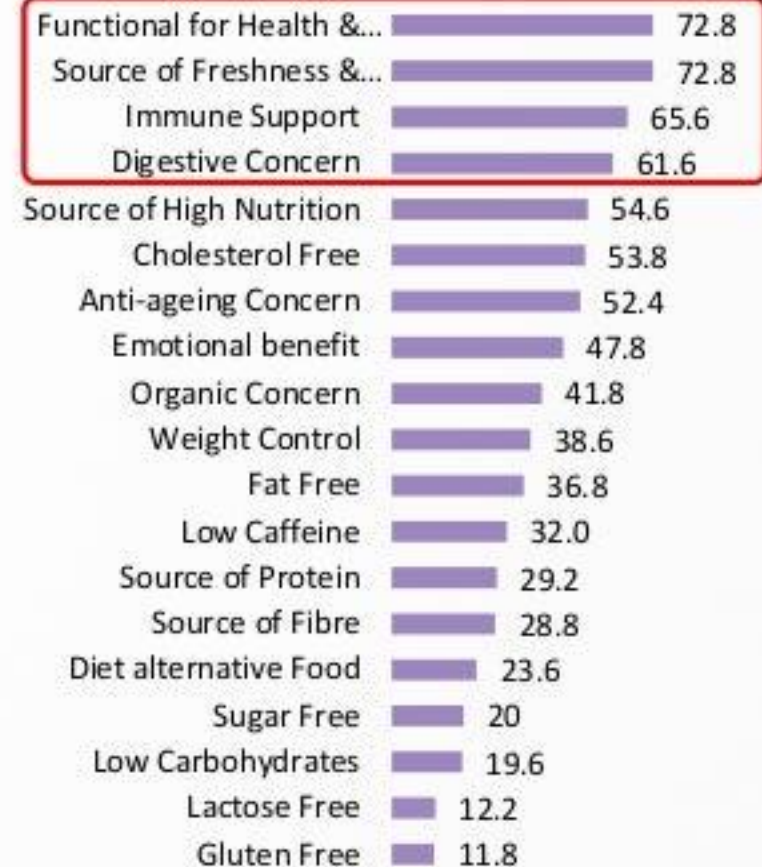
Thailand (n=500)



Indonesia (n=500)



Vietnam (n=500)



* Ready to eat healthy food concern

(Unit: %)

D. Detail findings

1. General attitude about RTE healthy food
- 2. RTE healthy food Habits**
3. RTE healthy Food Awareness
4. RTE healthy food improvement & key trends
5. RTE healthy food lifestyle & attitude

RTE healthy food purchase frequency

Q2. Please tell us how often do you buy ready to eat healthy food ? [SA]

- While the majority of Thai & Indonesia consume RTE healthy food more than once per week (44.0%). The majority of Vietnam respondents are purchasing 2-3 times/month (34.6%) and the minority consume everyday (29.0%)



* Ready to eat healthy food purchase frequency

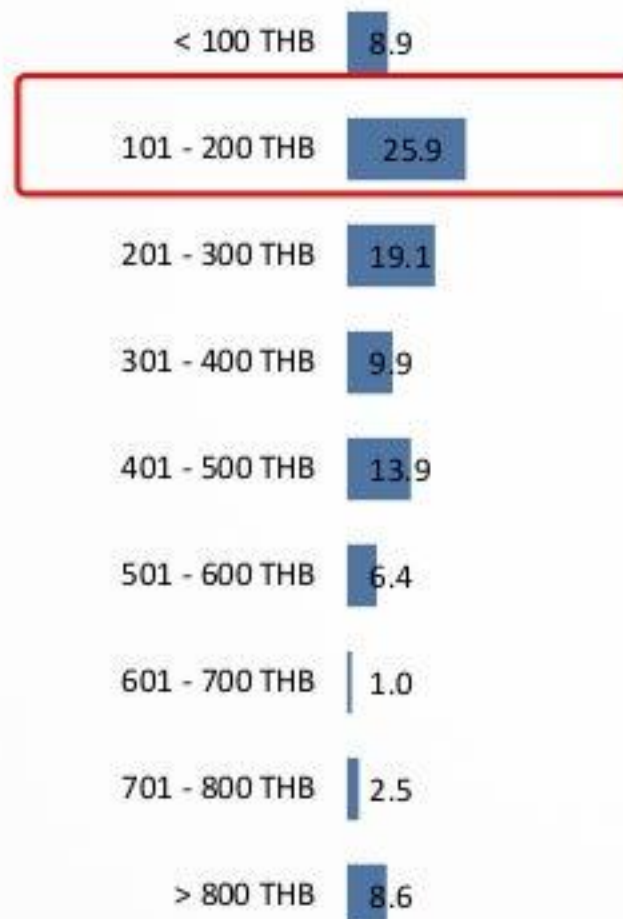
(Unit: %)

RTE healthy food purchase spending

Q6. Please tell us how much do you often spend for one time purchasing on ready to eat healthy food ? [SA]

- The majority of Thai, Indonesia and Vietnam are spending at moderate spending for one time purchasing

Thailand (n=500)



Indonesia (n=500)



Vietnam (n=500)



* Ready to eat healthy food purchase spending

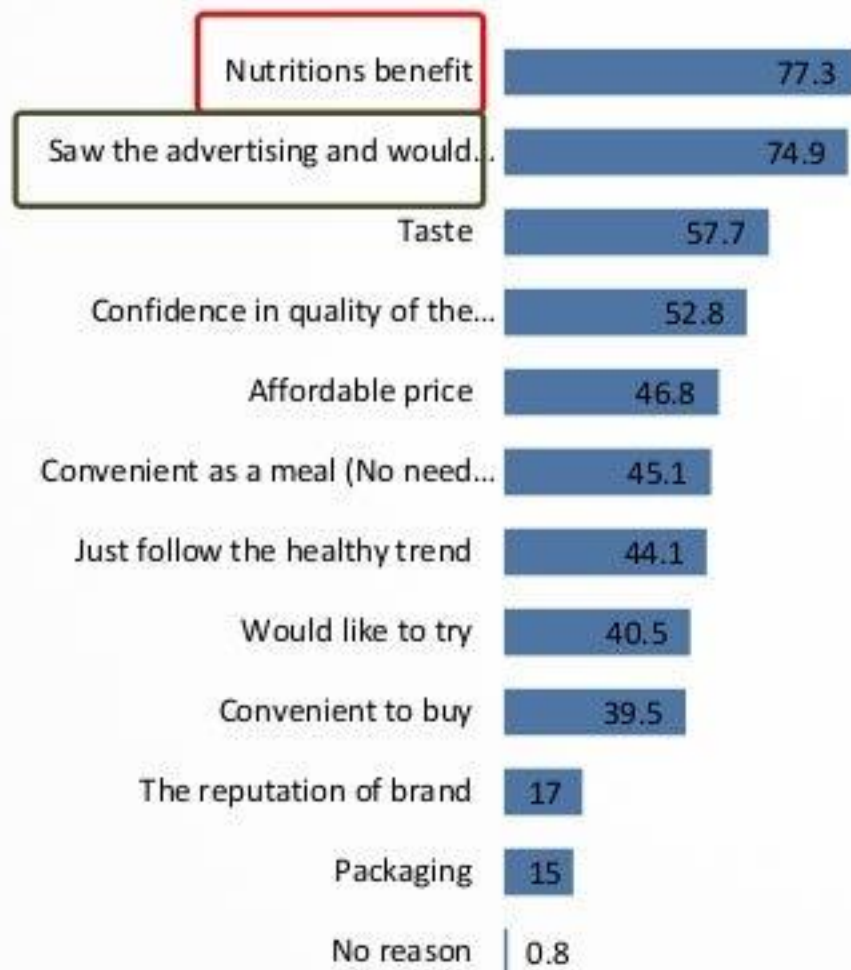
(Unit: %)

RTE healthy food factor to purchase

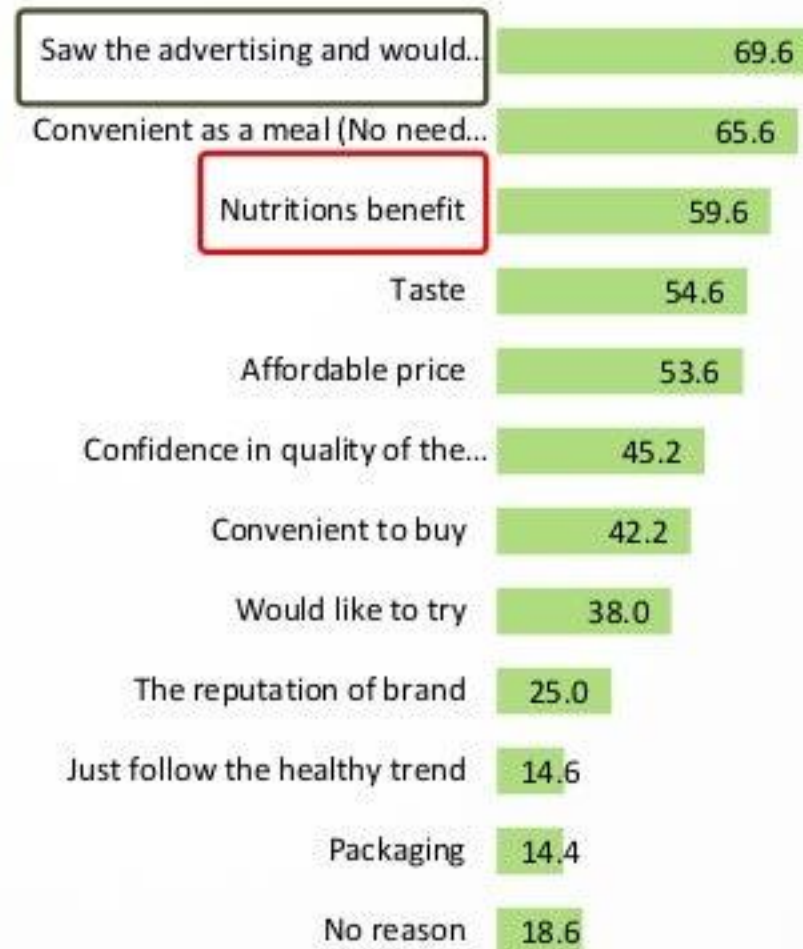
Q10. Please tell us the reason why you purchase ready to eat healthy food ? [MA]

- Nutrients benefit & advertisement encouragement are the key factors to purchase healthy food among 3 countries.
- Besides that, convenient as meal is also the key factor to consider to purchase healthy food for Indonesian & Vietnamese, while taste belongs to the top consideration for Thai people.

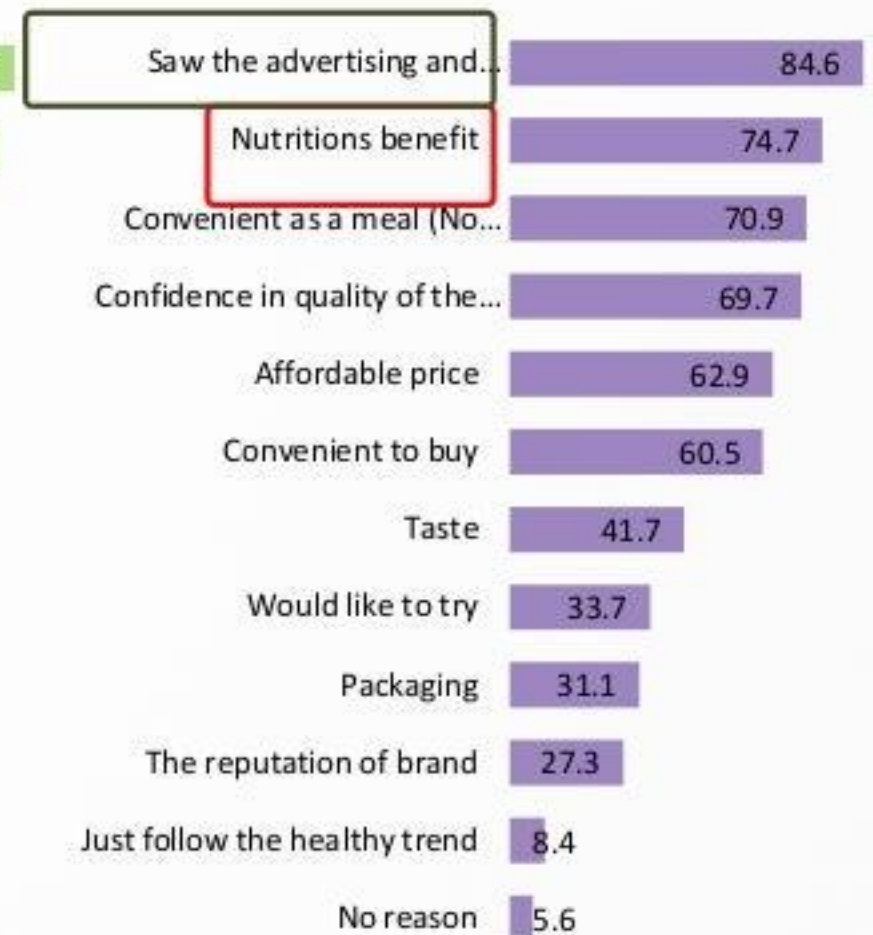
Thailand (n=500)



Indonesia (n=500)



Vietnam (n=500)



* Ready to eat healthy food factor to purchase

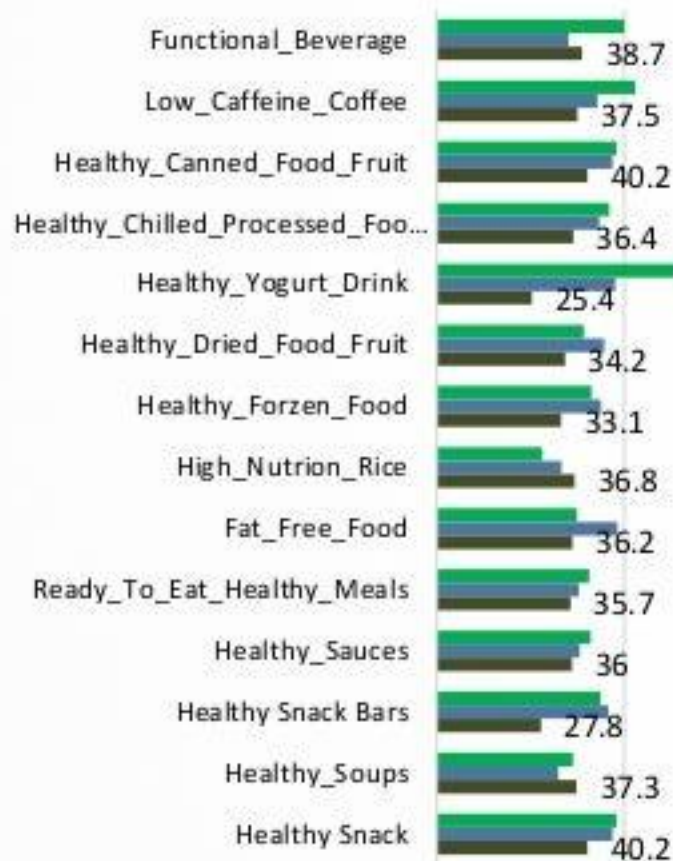
(Unit: %)

RTE healthy food place to buy

Q12. Please tell us which place you like to buy your ready to eat healthy food ?[MMA]

- While convenience store is the main channel for Thai & Indonesian people, but it's not the main channel at all in Vietnam. The main channel to purchase RTE healthy food is dominated by supermarket in Vietnam. While healthy food store is the third alternative place for Thailand and Vietnam, yet it does not play role at all in Indonesia.

**Thailand
(n=500)**

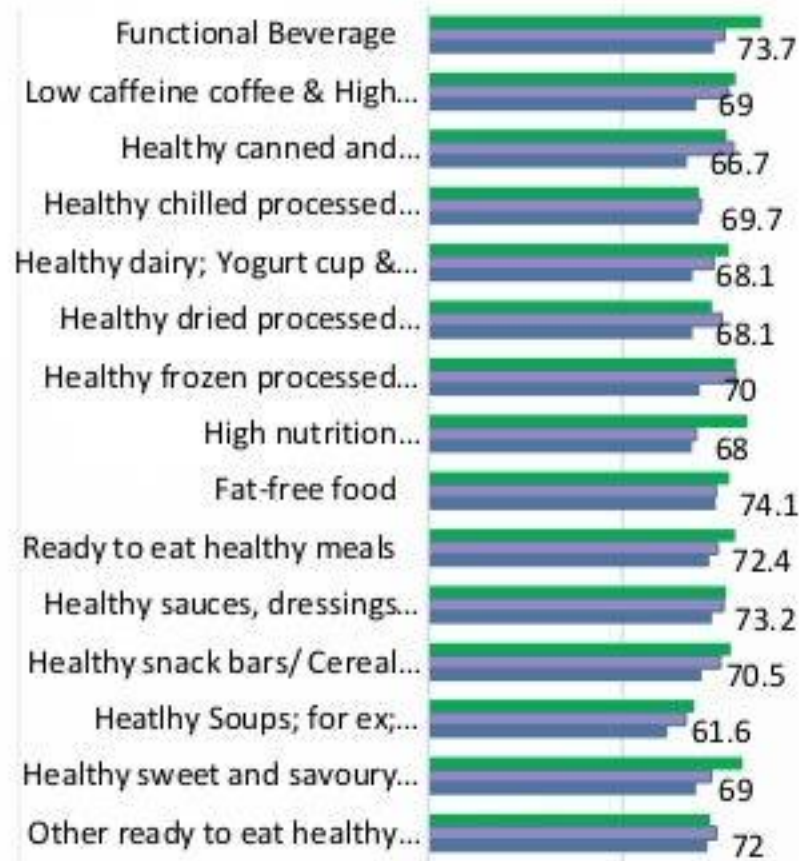


Supermarket

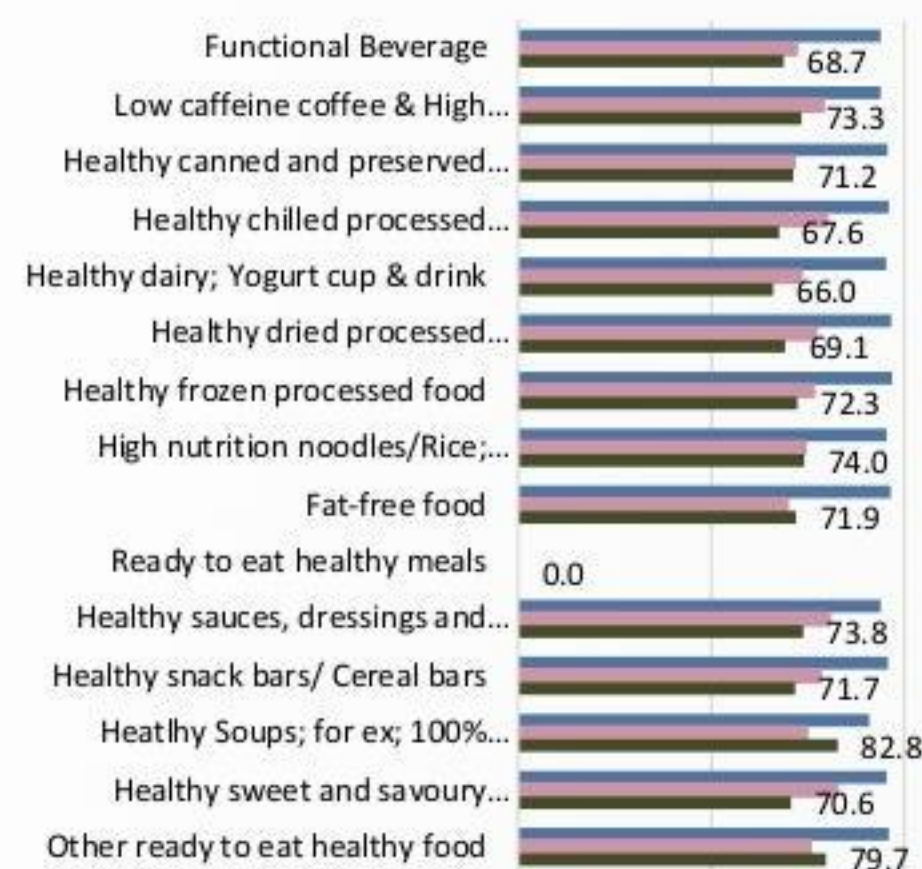
Healthy Food Store

Convenient store

**Indonesia
(n=500)**



**Vietnam
(n=500)**



Hypermarket

Grocery Shop

(Unit: %)

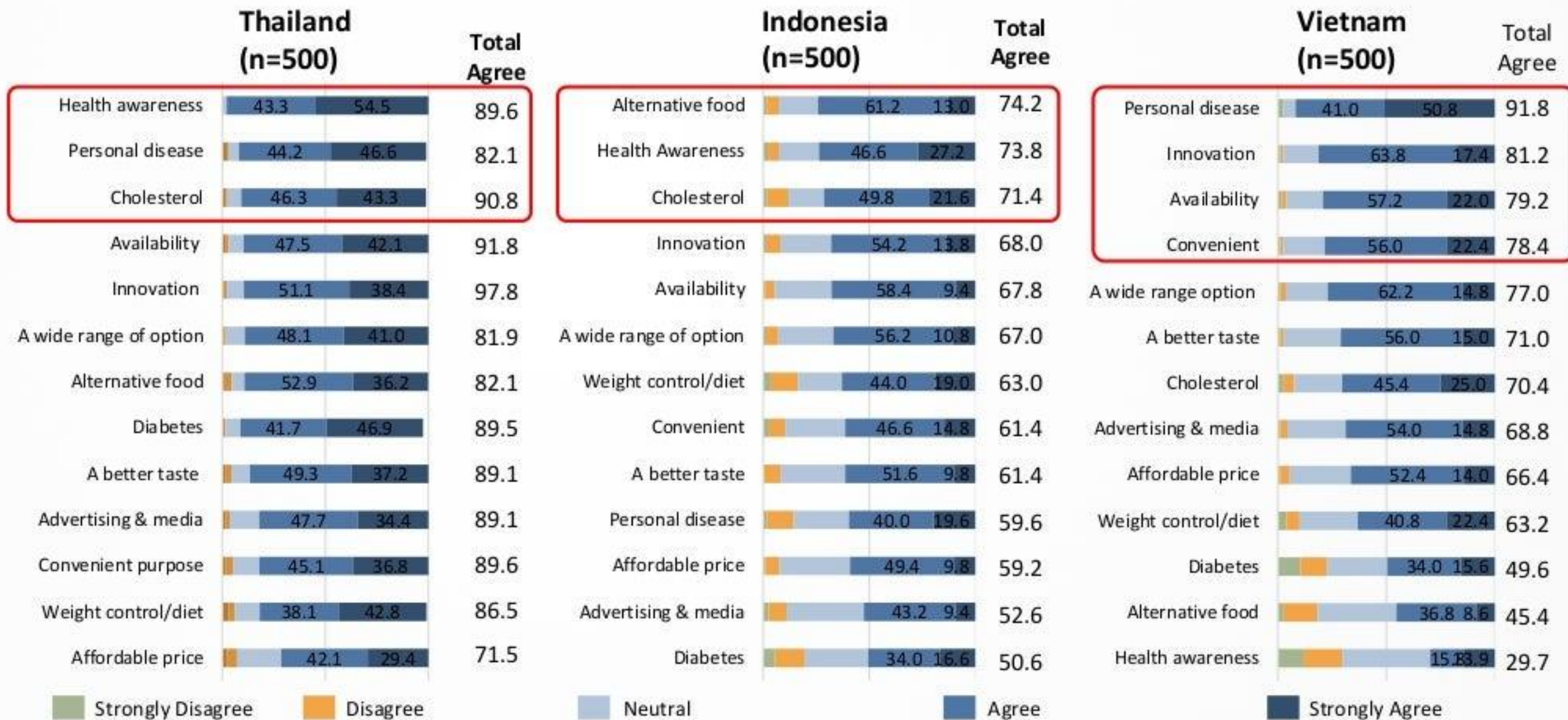
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RTE healthy food awareness

Q4 Do you agree with this statement at the time you started to aware of ready to eat healthy food ? [MSA]

- Personal health is the top motivation to consume healthy food among people living in those 3 countries.
- Cholesterol is the top priority among 2 countries respondents in Thailand and Indonesia
- In addition, alternative food is the top trigger for Indonesian use healthy food, while some benefits including innovation, convenience are in Vietnam.



(Unit: %)

RTE healthy food sources of information

Q7. Which media channel you mostly found ready to eat healthy food information ? [MA]

- Information source for healthy food is the same in those 3 countries.
- Advertising on TV, Internet and healthy shop/ supermarket are the top 3 information sources for Indonesians, Thai people and Vietnamese.

Thailand (n=500)

Ads on TV 68.0

Internet 64.4

Healthy shop/Supermarket (Own observation) 59.9

Magazine (Healthy; Food Related) 54.0

Ads on Billboard 29.1

Newspaper 26.7

Radio 11.1

Others 8.9

Indonesia (n=500)

Ads on TV 73.6

Internet 66.6

Healthy shop/Supermarket (Own observation) 66.0

Magazine (Healthy; Food Related) 37.6

Newspaper 20.6

Ads on Billboard 17.6

Radio 8.8

Others 4.4

Vietnam (n=500)

Internet 86.8

Ads on TV 82.8

Healthy shop/Supermarket (Own observation) 66.6

Magazine (Healthy; Food Related) 58.6

Ads on Billboard 39.6

Newspaper 31.0

Radio 6.6

Others 2.4

* Ready to eat healthy food purchase frequency

(Unit: %)

RTE healthy food awareness influencers

Q2. Please tell us who else in your family consuming healthy food including relatives & friends ? [MA]

- Father/Mother has played a major role a RTE healthy food influencers for the majority of respondents in 3 countries
- While the 2nd influencers for Indonesian is brother/sister (39.8%); for Vietnam is relatives (34.2%) and for Thailand is husband/wife (20.9%)

Thailand (n=500)

Father/Mother 39.3

Husband/Wife 20.9

Friends 13.2

Colleges 8.5

Brother/Sister 8.1

Relatives 6.9

Son/Daughter 3.2

Indonesia (n=500)

Father/Mother 50.2

Brother/Sister 39.8

Husband/Wife 44.8

Son/Daughter 33.0

Relatives 36.2

Friends 35.2

Colleges 21.0

Vietnam (n=500)

Father/Mother 35.2

Relatives 24.2

Husband/Wife 19.8

Friends 9.4

Son/Daughter 5.4

Brother/Sister 5.2

Colleges 0.8

* Ready to eat healthy food purchase frequency

(Unit: %)

D. Detail findings

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5. RTE healthy food lifestyle & attitude