

ASEAN—JICA Food Value Chain Development Project

Marketing and promotion of National and ASEAN GAPs

EXECUTIVE SUMMARY

Consumer Survey in 6 AMSs

June 2025

International Development Center of Japan



Overview of the Consumer Survey

1. Objectives:

As part of the AJFVC GAP Component activities, a consumer survey was conducted in Cambodia, Indonesia, Malaysia, Philippines, Singapore and Thailand.

- To measure awareness and recognition of Good Agricultural Practices (GAP)
- To understand consumer perceptions and purchasing behavior related to GAP-certified products
- To inform targeted marketing & communication strategies for promoting GAP in the ASEAN region

2. Survey methodology:

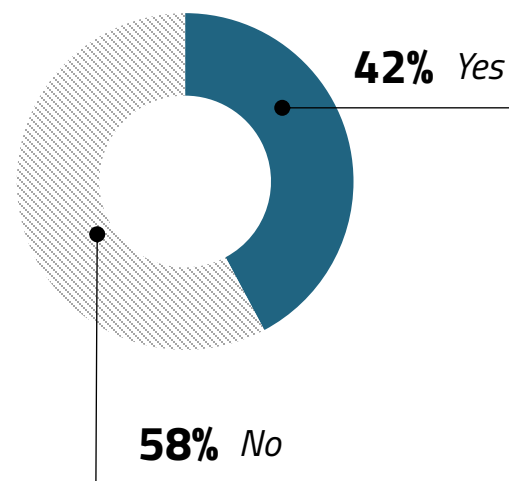
- Quantitative online survey
- Standardized questionnaire administered in local language
- Focused on vegetable consumers in capital and its suburbs
- Survey conducted in November 2024 (Cambodia, Thailand) and April–May 2025 (Indonesia, Malaysia, Philippines, Singapore)
- Total sample size: 1,615 respondents (Indonesia, Malaysia, Philippines, Singapore: 200 each; Thailand: 400; Cambodia: 415)



Consumer Survey Results: 6AMSs

Awareness of GAP

Base : n=1615



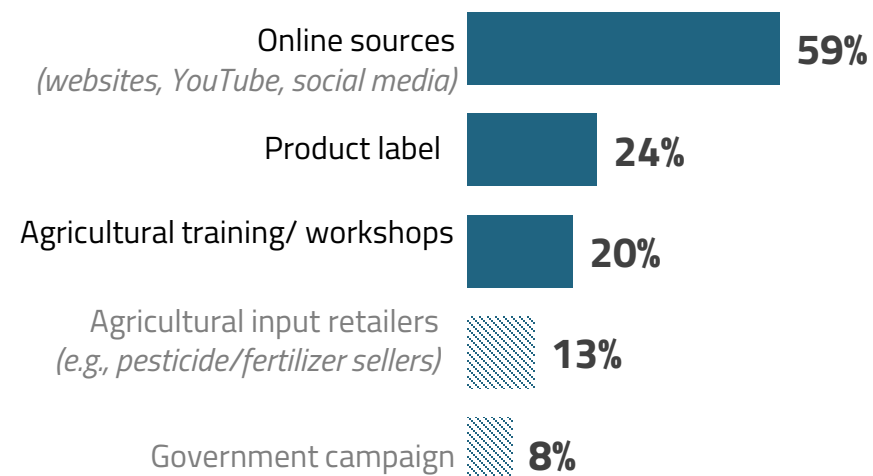
Type of GAPs

Base : n=1615

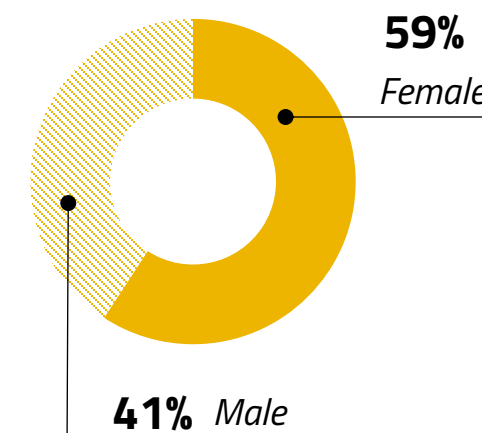


Source of Awareness

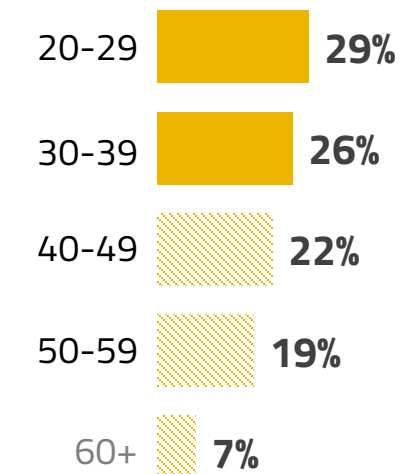
Base: Among those who said "Yes" to awareness of GAP



Gender

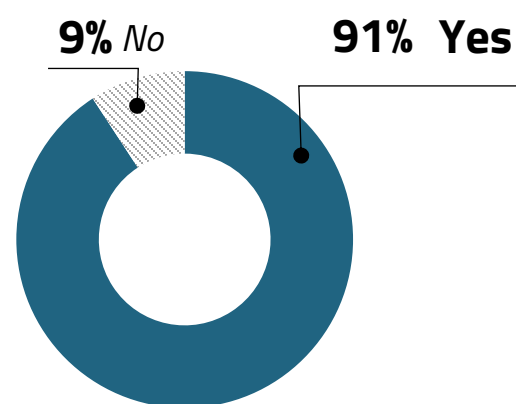


Age



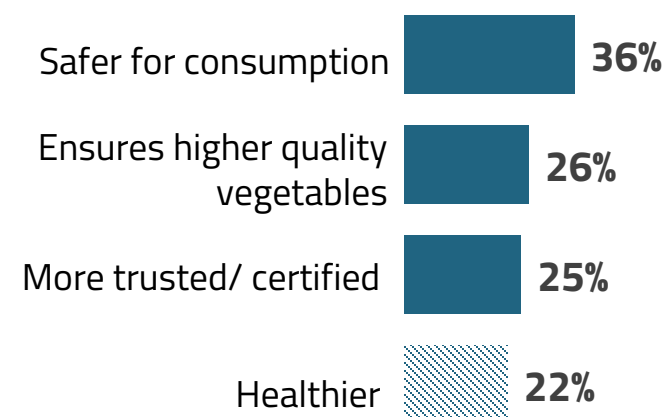
Willingness to buy GAP certified products

Base : n=1615



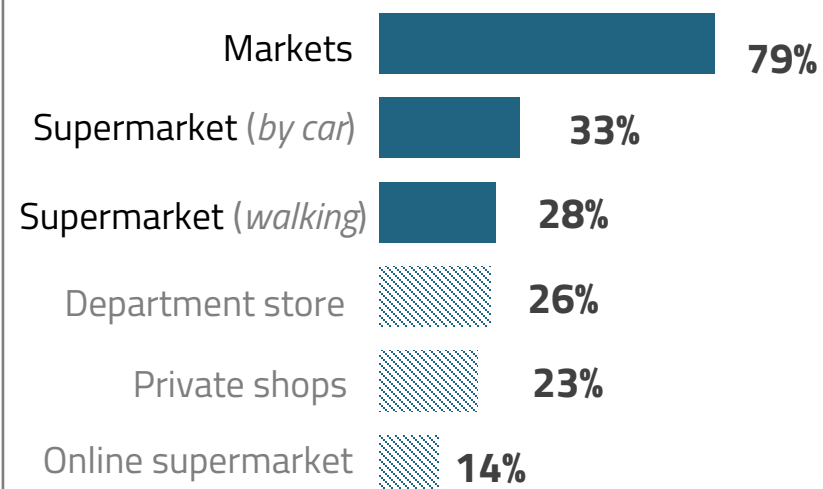
Reasons for saying "Yes"

Base: Among those who said "Yes"

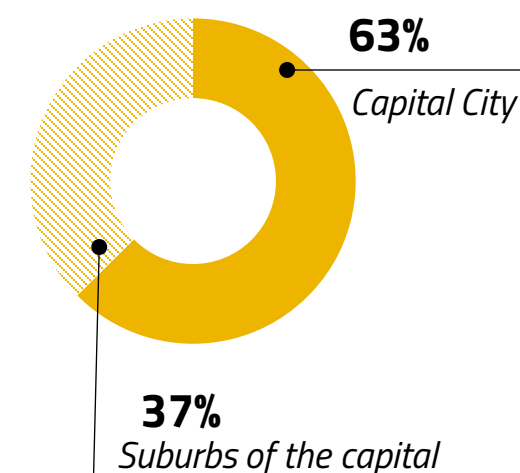


Place to buy vegetables

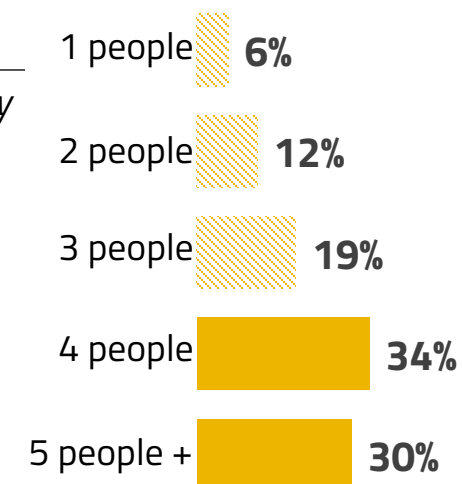
Base : n=1615



Cities



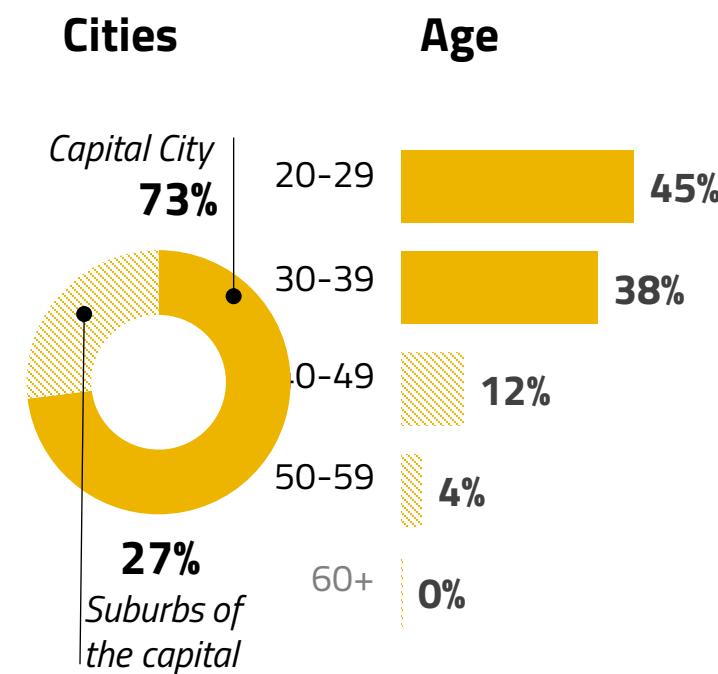
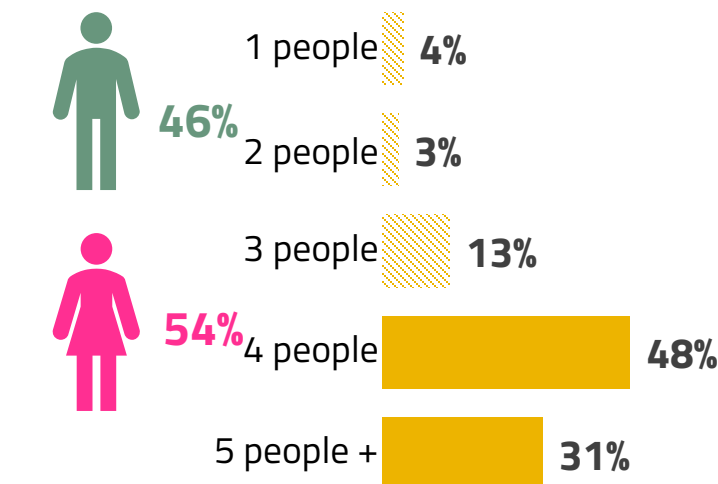
Size of household



Respondent Profile

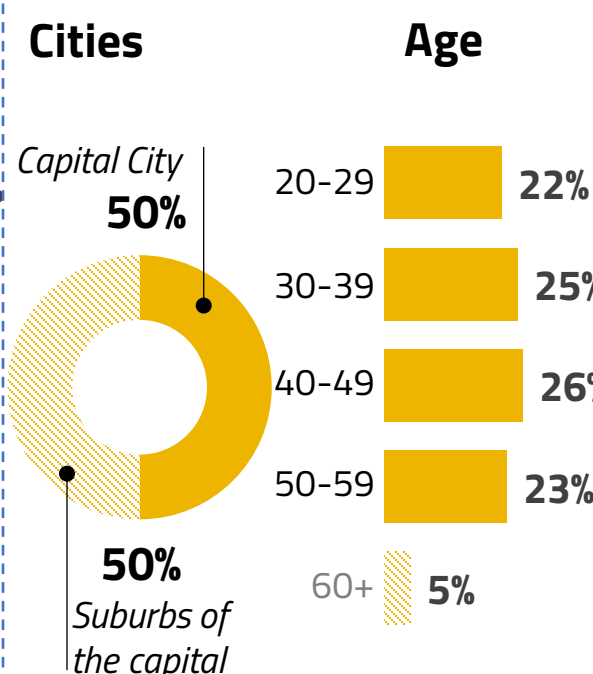
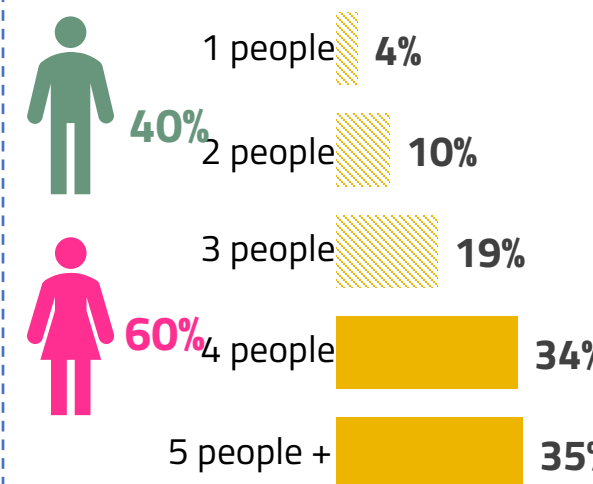
Cambodia *n=415*

Gender Size of household



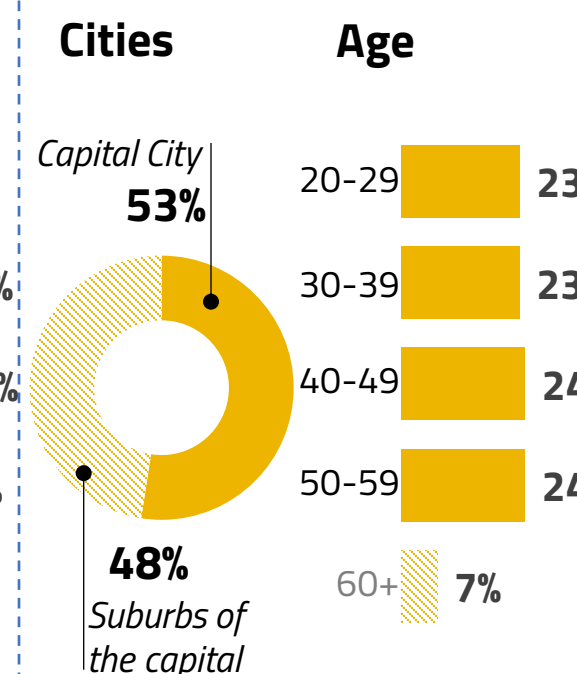
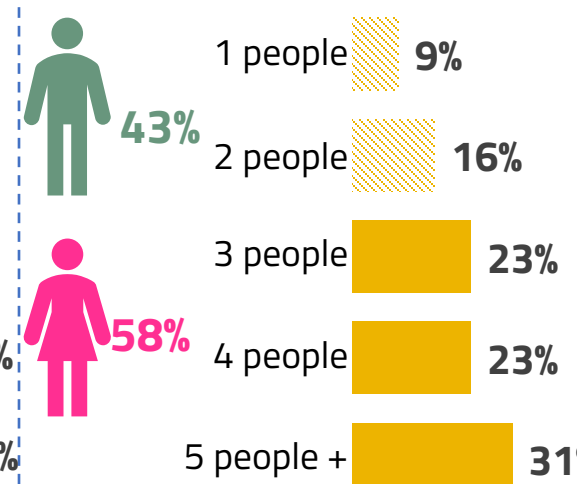
Indonesia *n=200*

Gender Size of household



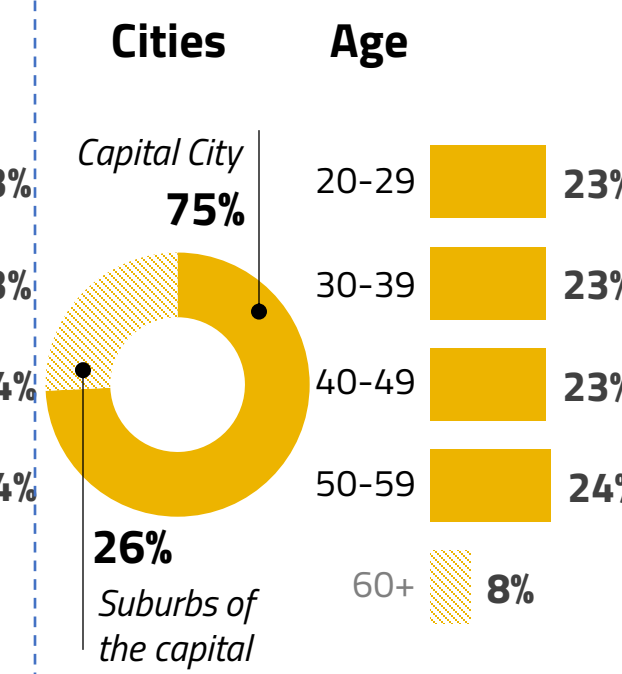
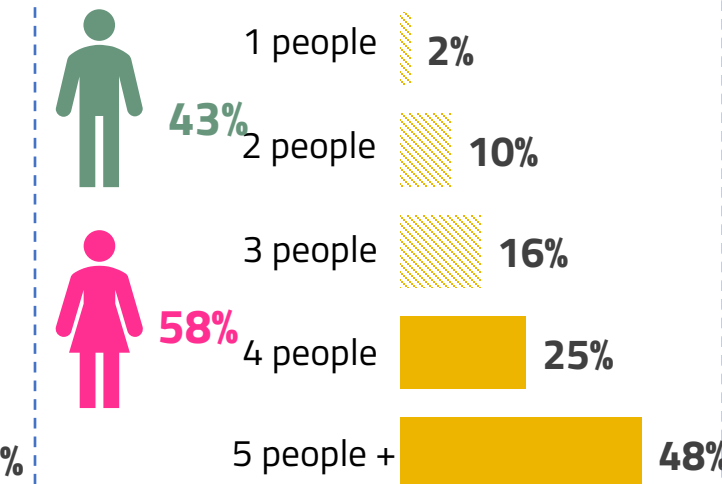
Malaysia *n=200*

Gender Size of household



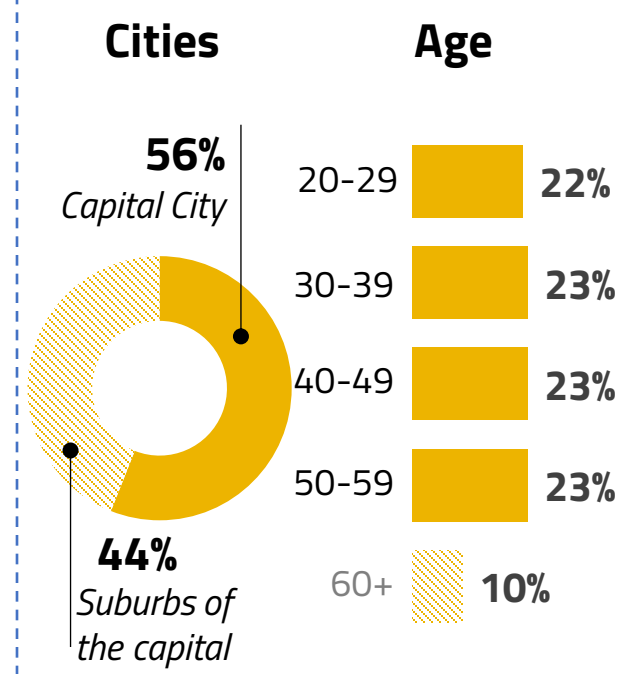
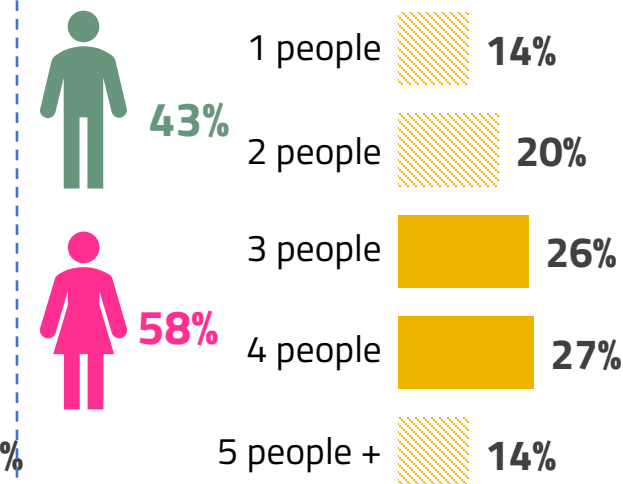
Philippines *n=200*

Gender Size of household



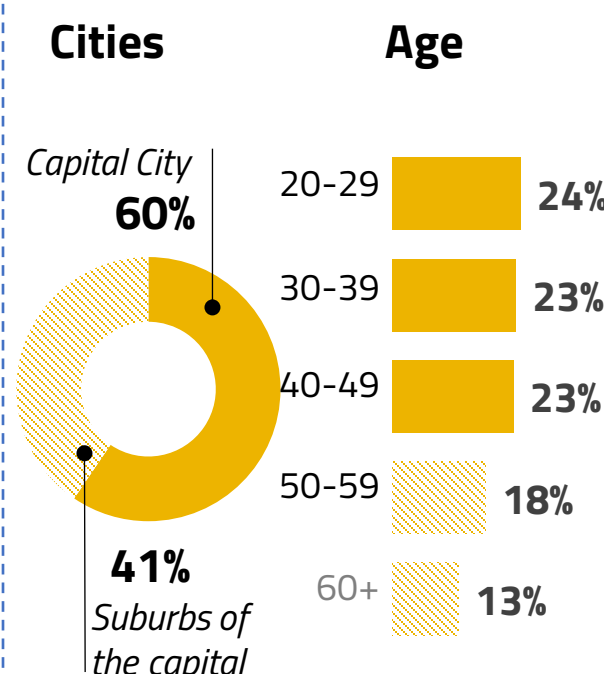
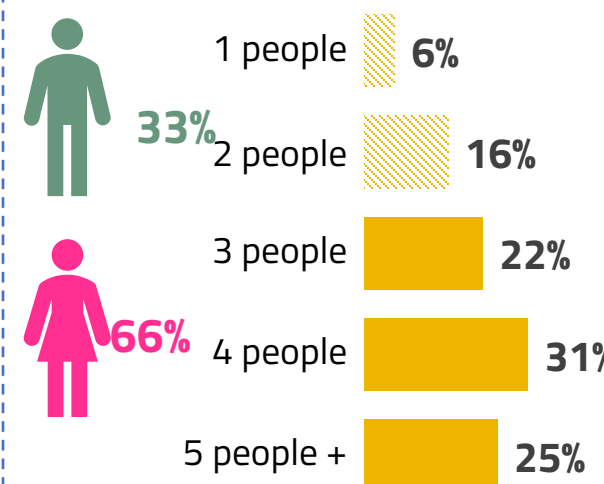
Singapore *n=200*

Gender Size of household



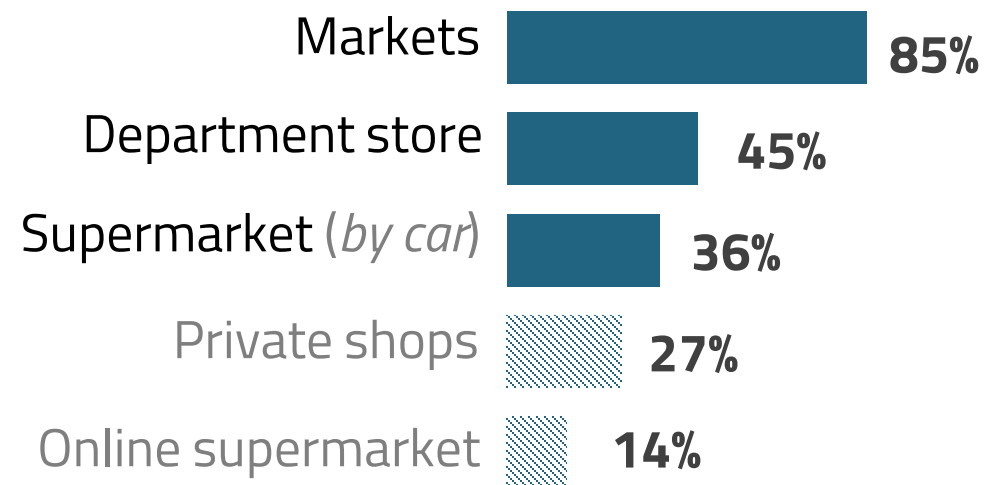
Thailand *n=400*

Gender Size of household

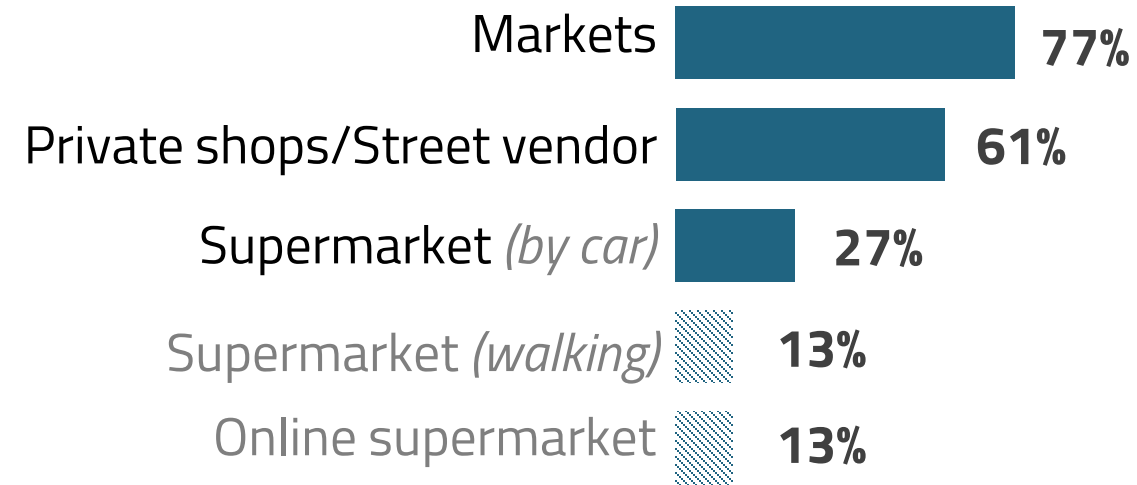


Place to buy Vegetables

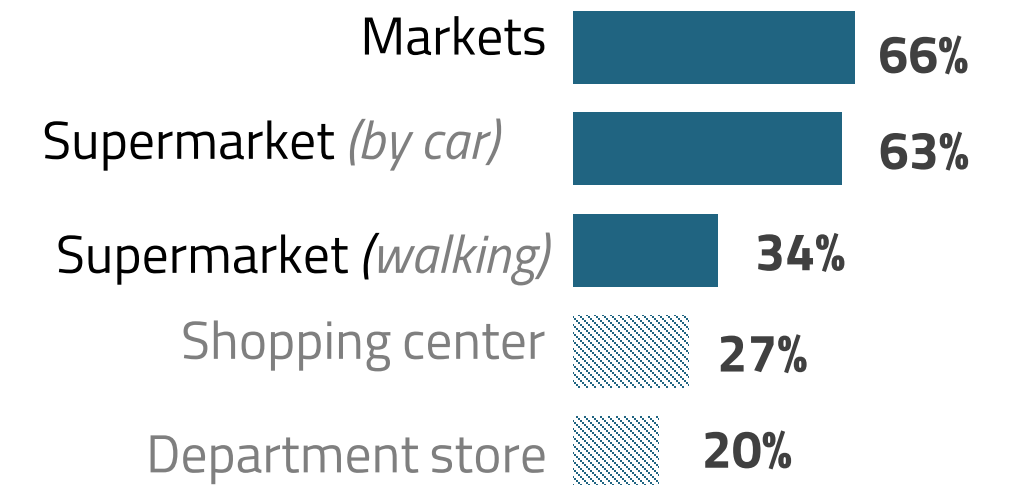
Cambodia n=415



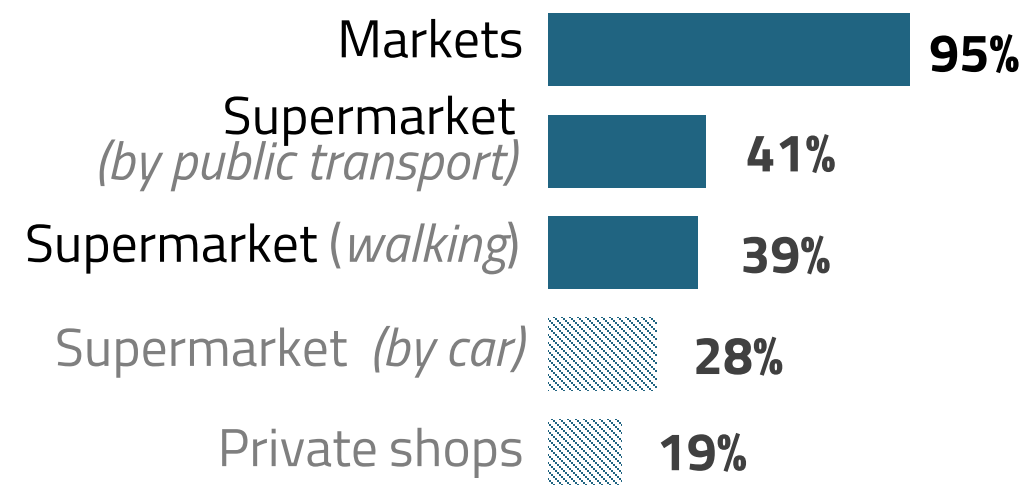
Indonesia n=200



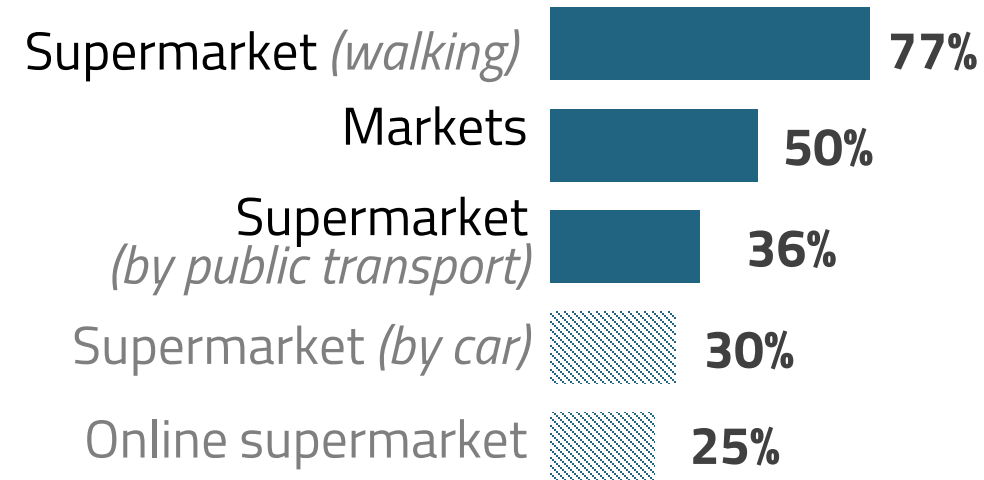
Malaysia n=200



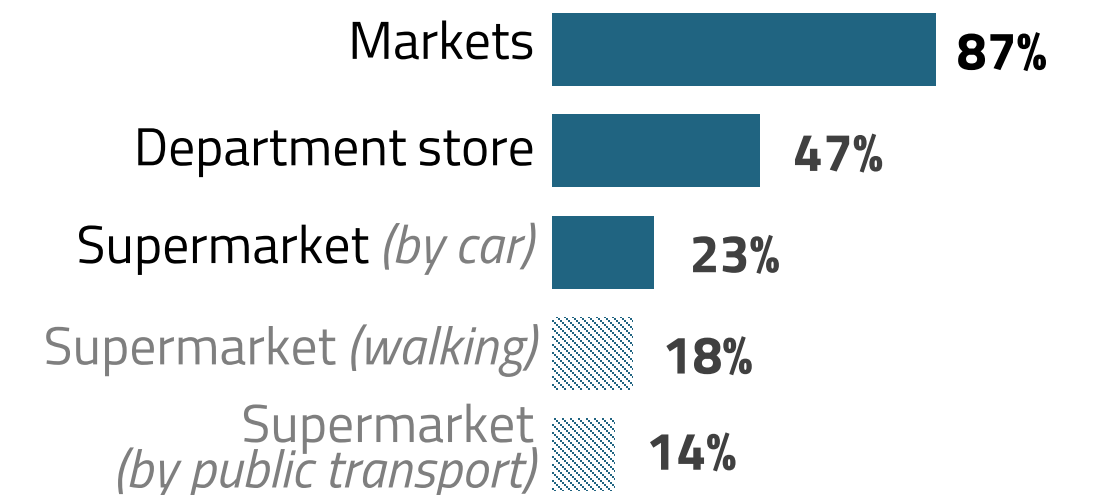
Philippines n=200



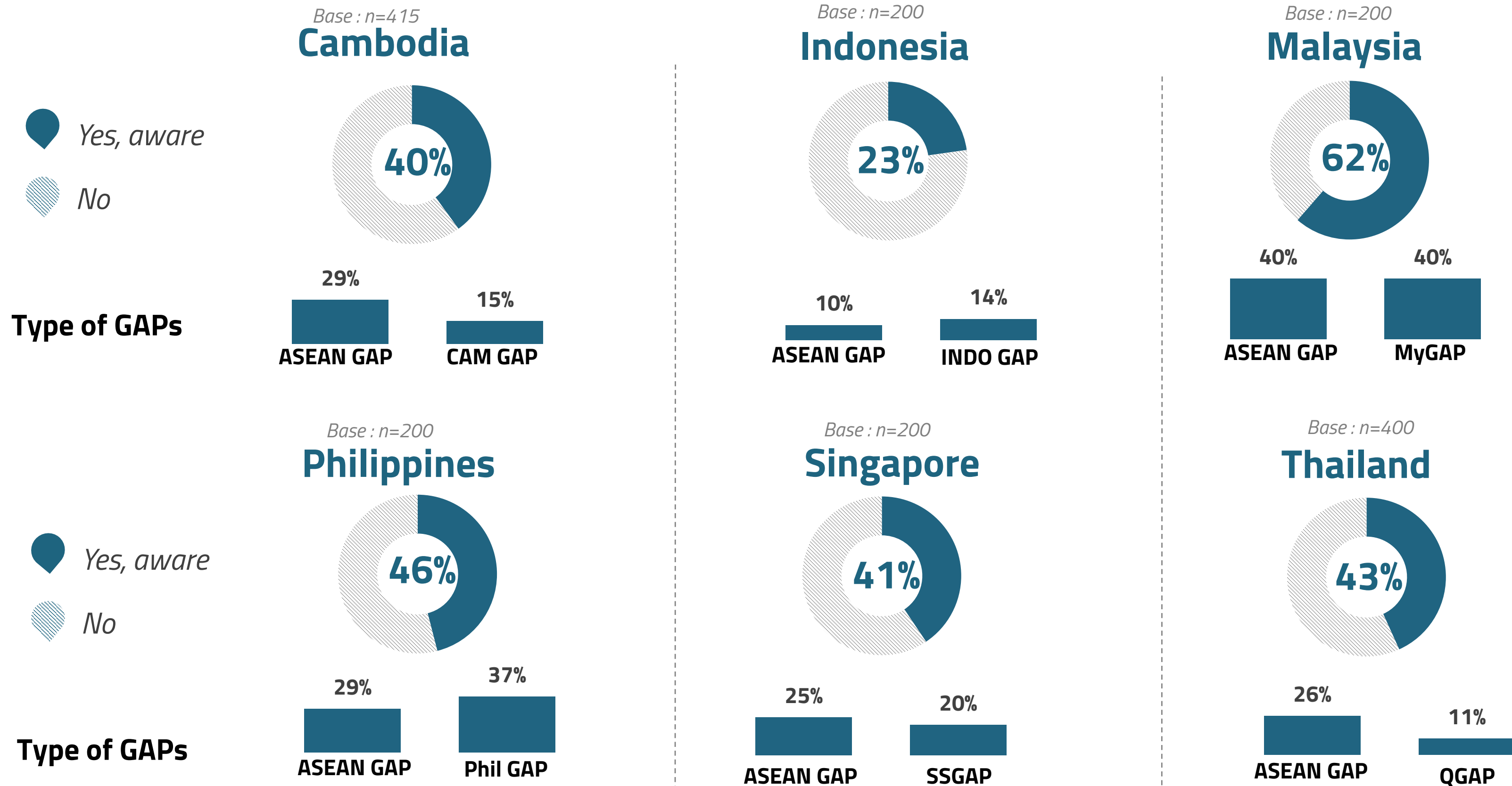
Singapore n=200



Thailand n=400



Awareness of GAP



Data interpretation of awareness of GAP

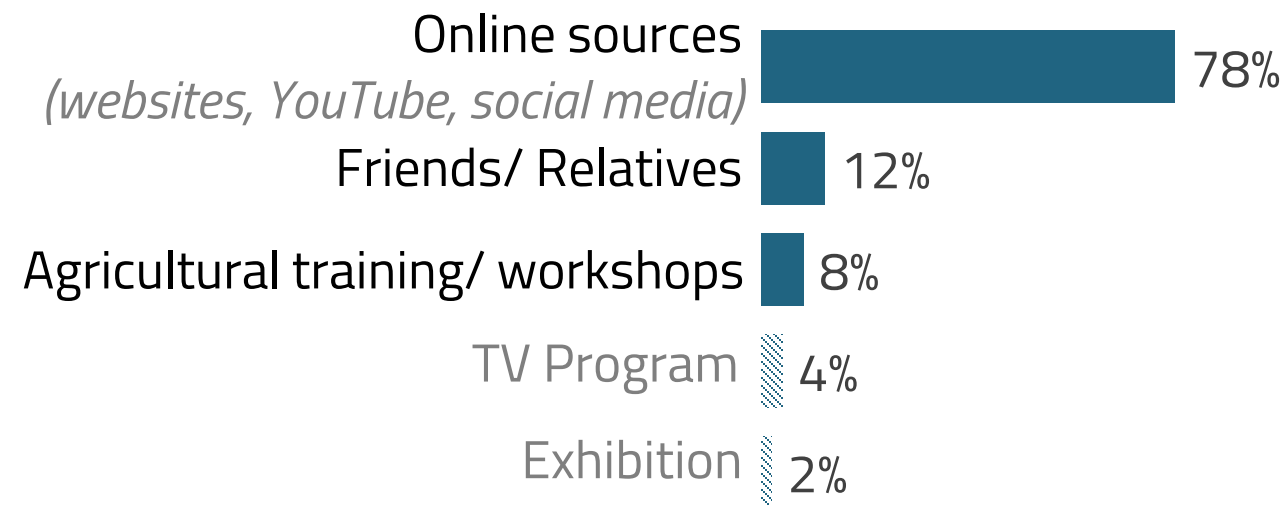
For example, in Singapore, 20% of all respondents knew about SS GAP (calculated as $41\% \times 49\% = 20\%$)

Q8a. Do you know "Good Agriculture Practice" (GAP)? Q8b. What GAPs do you know?

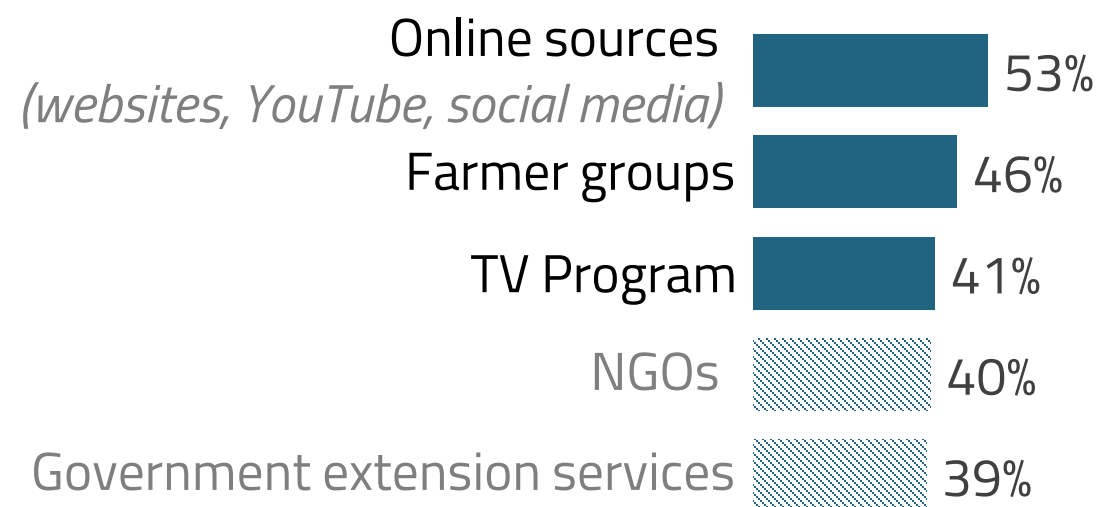
Source of Awareness of GAP

Base: Among those who said "Yes" to awareness of GAP

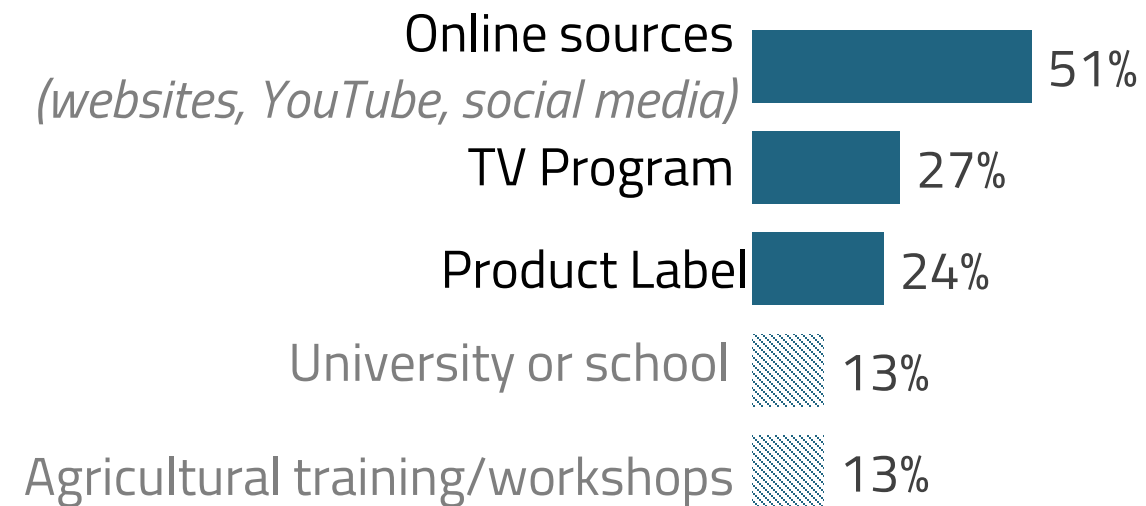
Cambodia



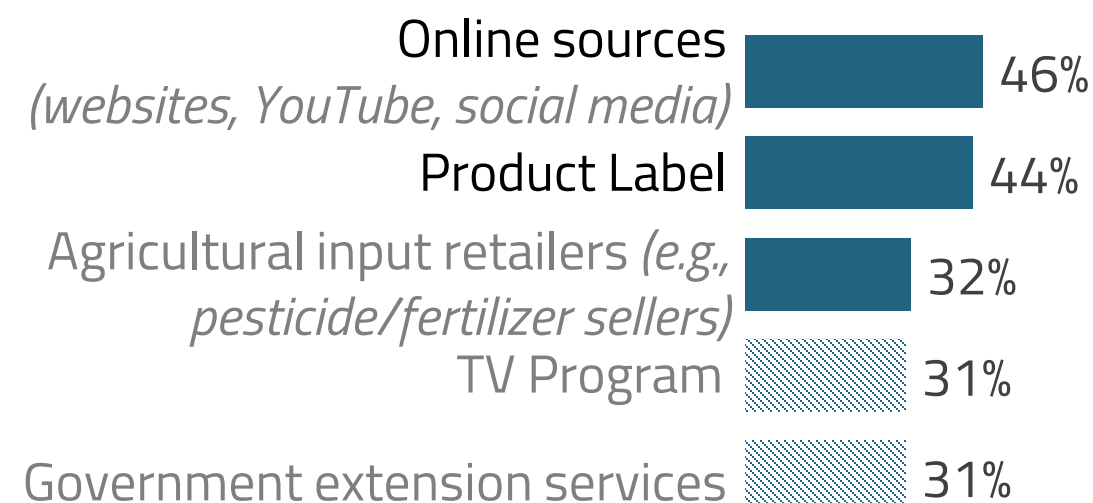
Philippines



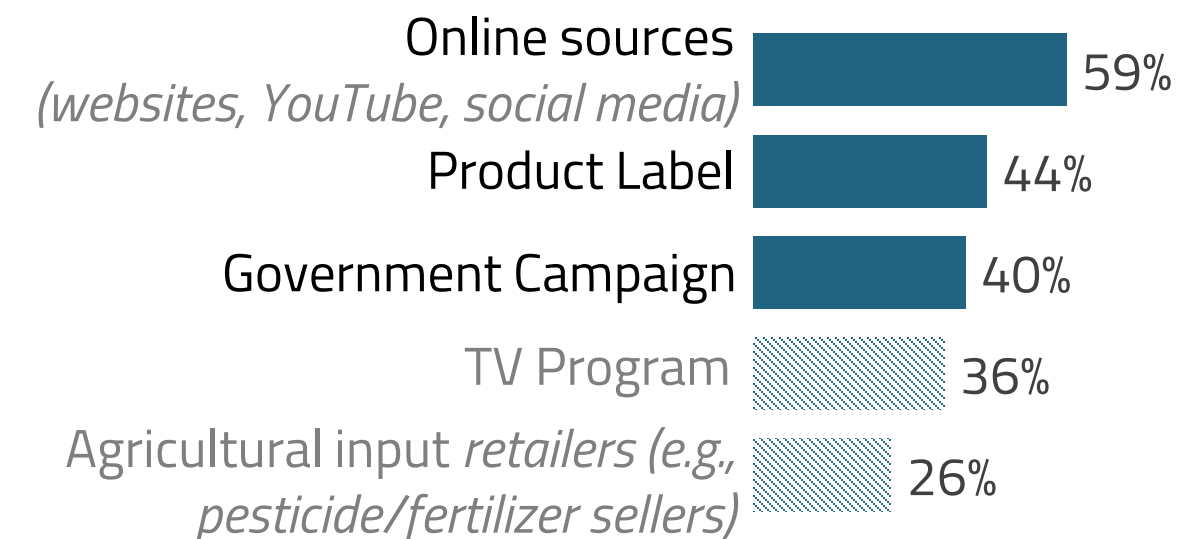
Indonesia



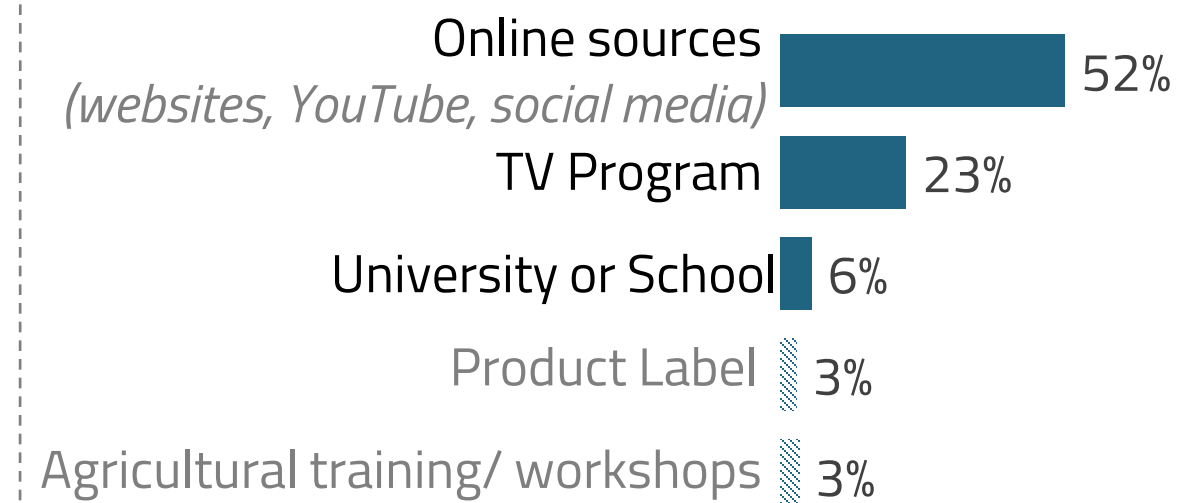
Singapore



Malaysia



Thailand

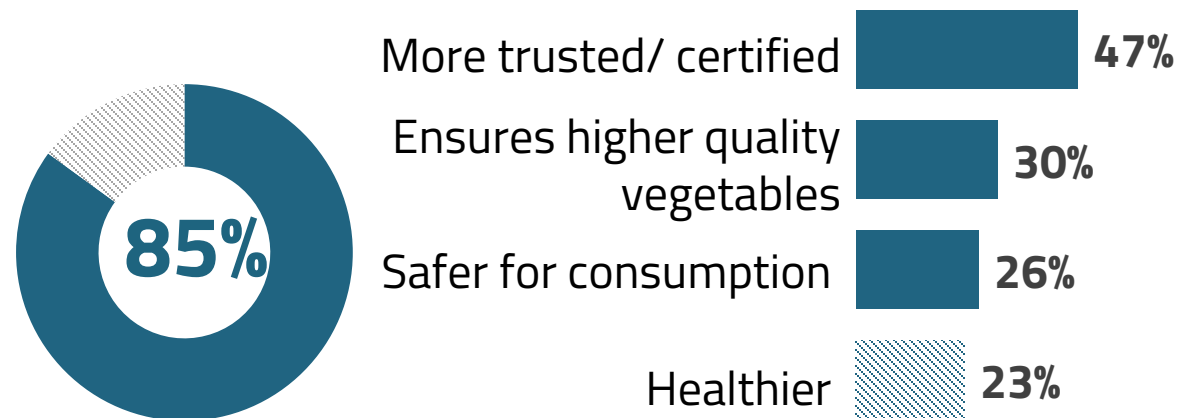


Willingness to buy GAP certified products

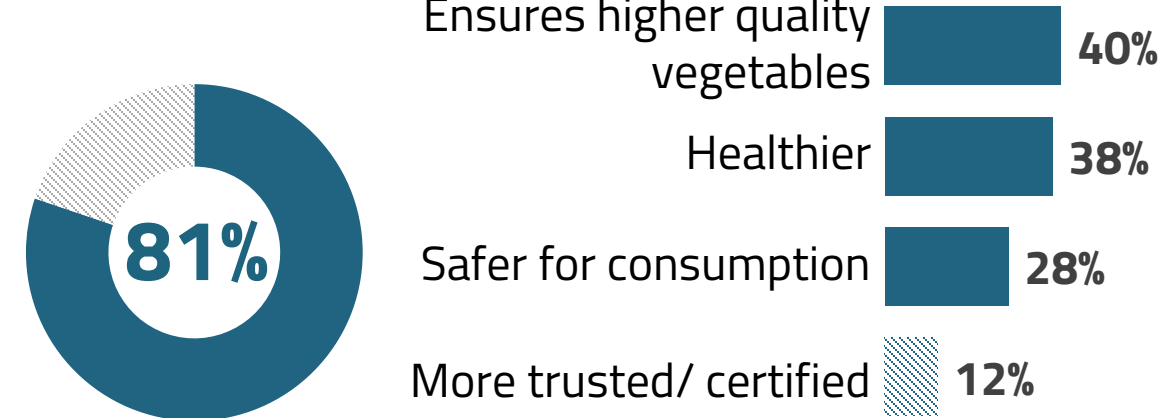
 Yes
  No
 Reasons for saying "Yes"
Base: Among those who said "Yes"

Base : n=415

Cambodia

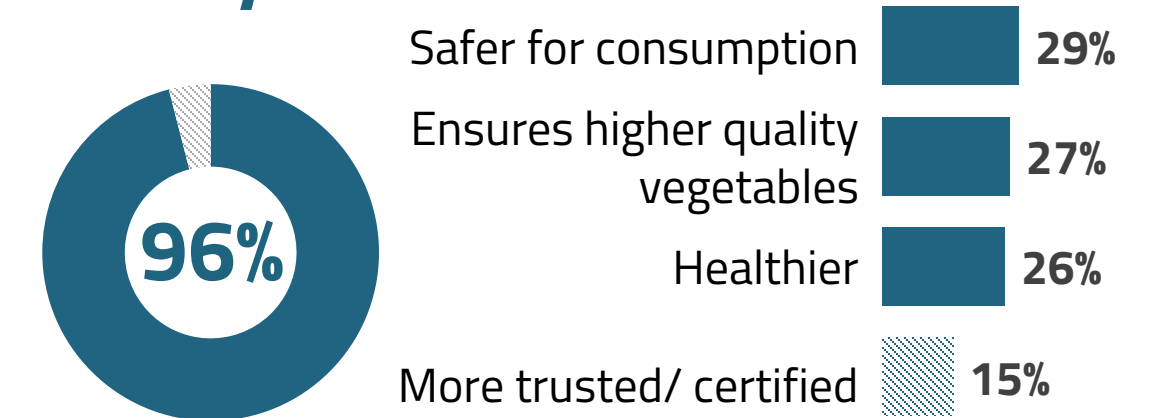


Indonesia



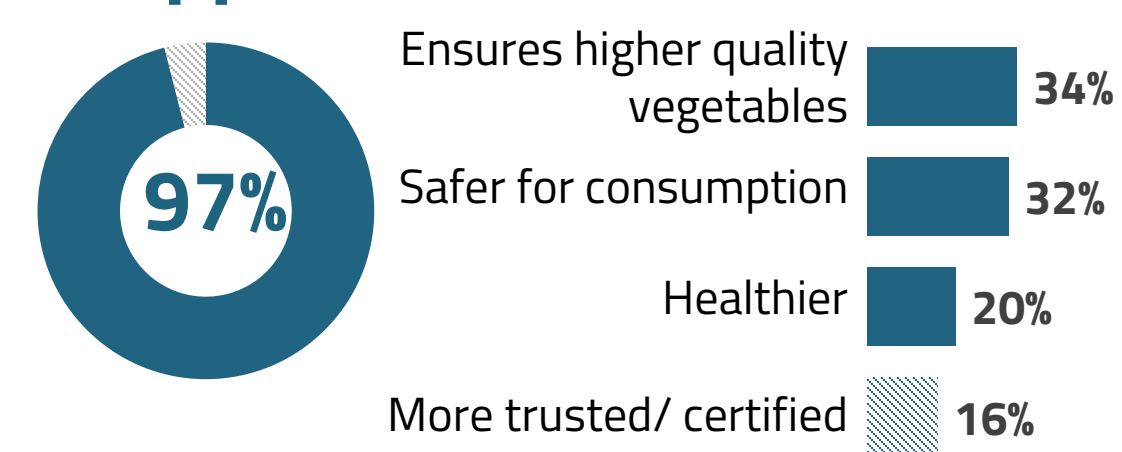
Base : n=200

Malaysia



Base : n=200

Philippines



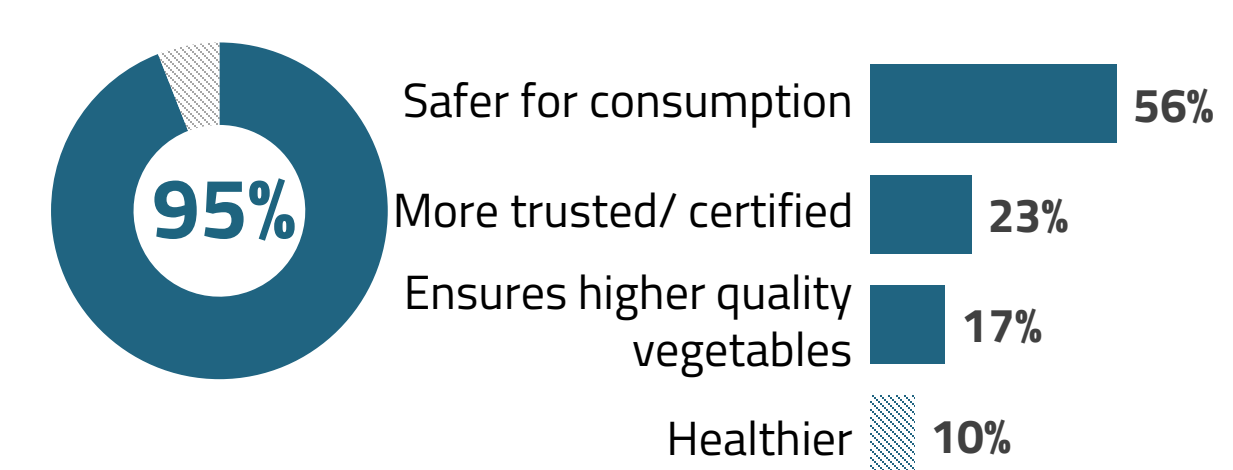
Base : n=200

Singapore



Base : n=400

Thailand



Key Summary and Implications

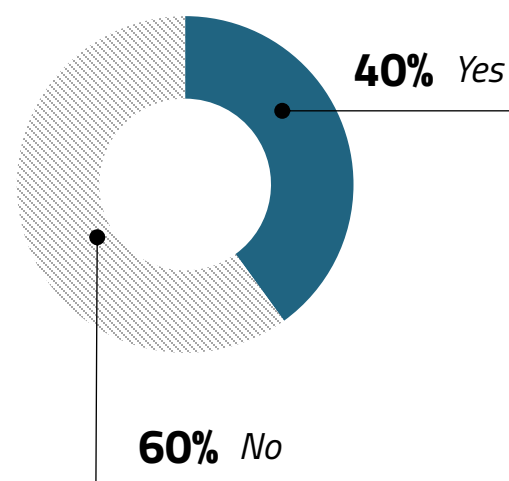
- Over **40%** of respondents across 6 AMSs were aware of GAP, with notable variations: **Malaysia had the highest awareness (62%)**, while **Indonesia was the lowest (23%)**.
- In most countries, **ASEAN GAP was more widely recognized than National GAP**, except in Thailand, where GLOBAL G.A.P. surpassed the recognition of its national scheme (QGAP).
- The **most common source of awareness was online platforms** (websites, YouTube, social media), accounting for **59%** of responses.
- After receiving a brief explanation of GAP, **over 90% expressed willingness to buy GAP-certified vegetables**, citing **food safety, high quality, and trustworthiness** as primary reasons.
- The **main purchase locations** for vegetables were **local markets and supermarkets**, although patterns varied by country.
- These findings suggest that **digital outreach—especially through social media—has strong potential to increase GAP recognition** in the region.
- To measure the long-term impact of PR efforts, it is important to **encourage each AMS to plan regular consumer surveys** using national budgets, **as public outreach requires continuous engagement to be effective**.



Country-level Details (for reference): Cambodia

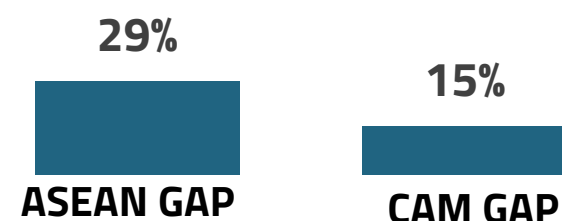
Awareness of GAP

Base : n=415



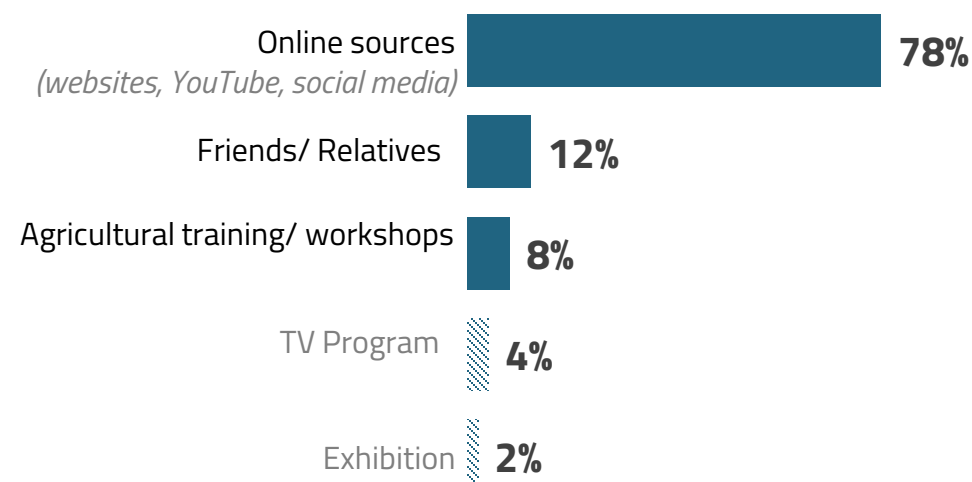
Type of GAPs

Base : n=415

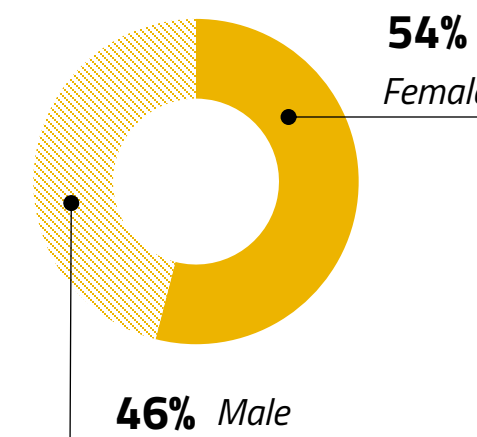


Source of Awareness

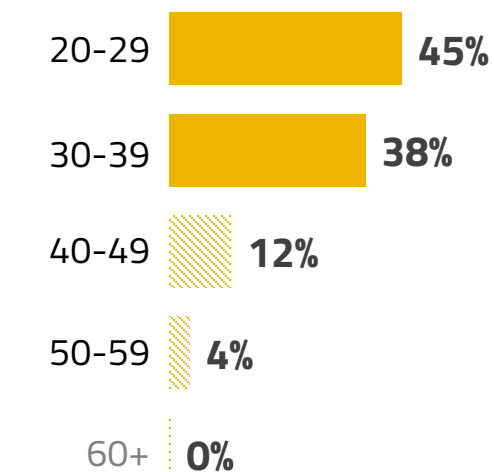
Base: Among those who said "Yes" to awareness of GAP



Gender

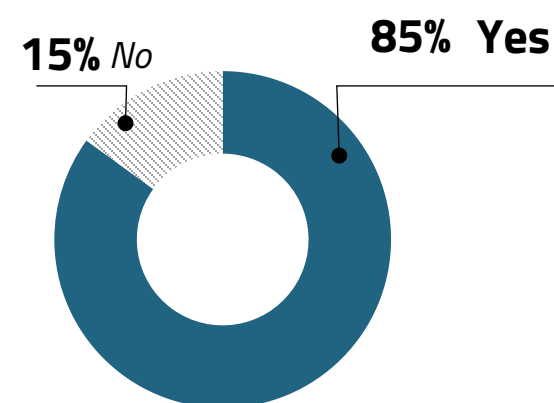


Age



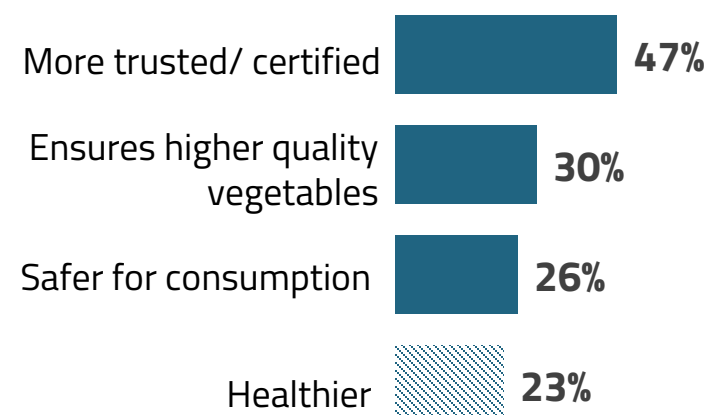
Willingness to buy GAP certified products

Base : n=415



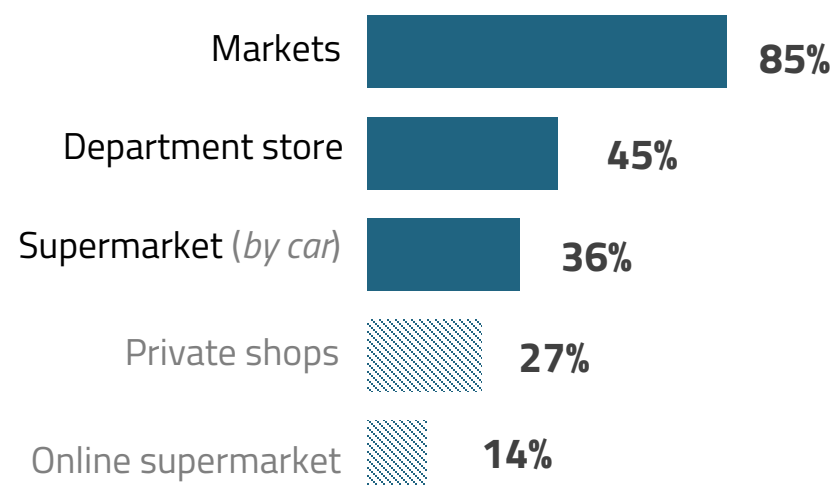
Reasons for saying "Yes"

Base: Among those who said "Yes"

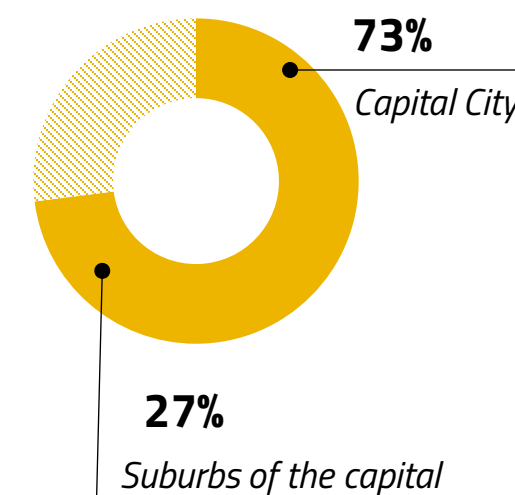


Place to buy vegetables

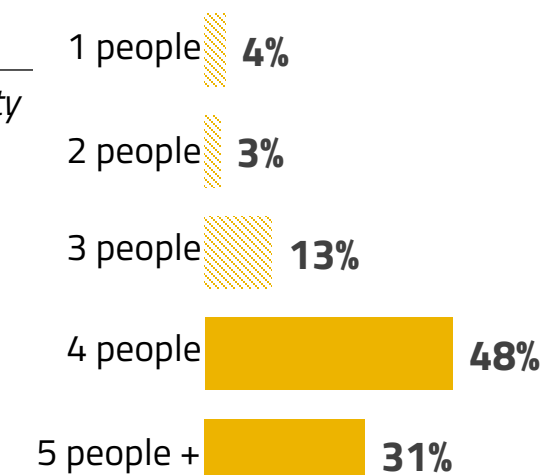
Base : n=415



Cities



Size of household

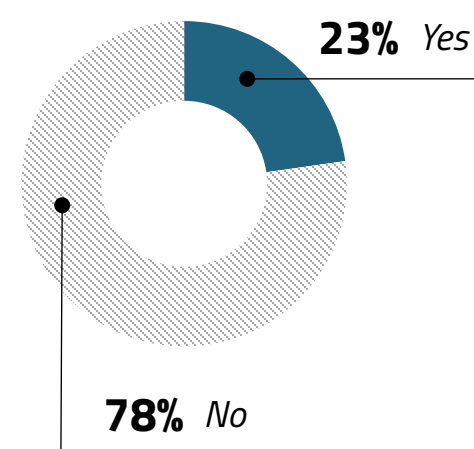




Country-level Details (for reference): Indonesia

Awareness of GAP

Base : n=200



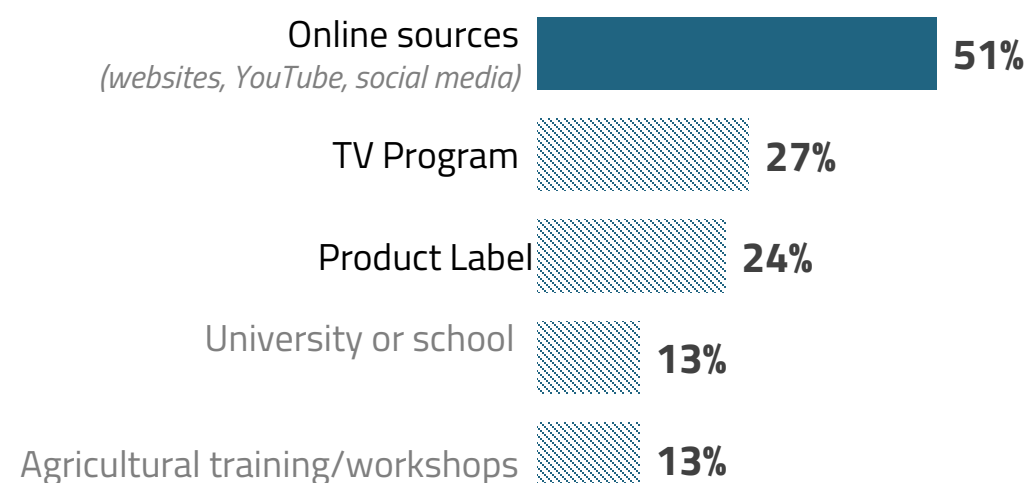
Type of GAPs

Base : n=200

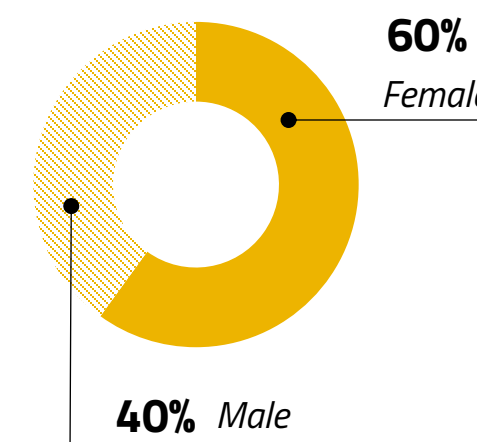


Source of Awareness

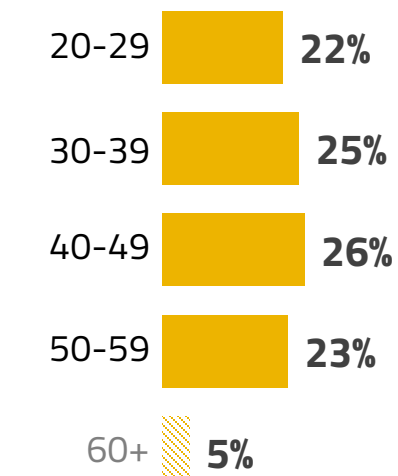
Base: Among those who said "Yes" to awareness of GAP



Gender

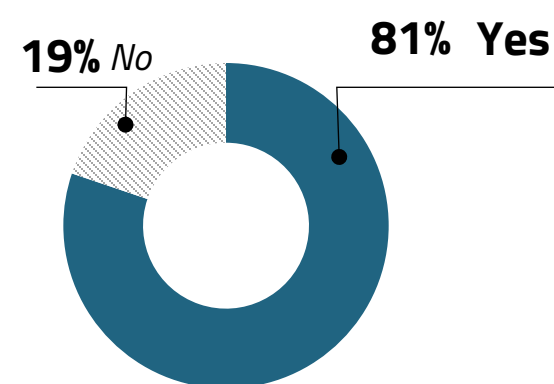


Age



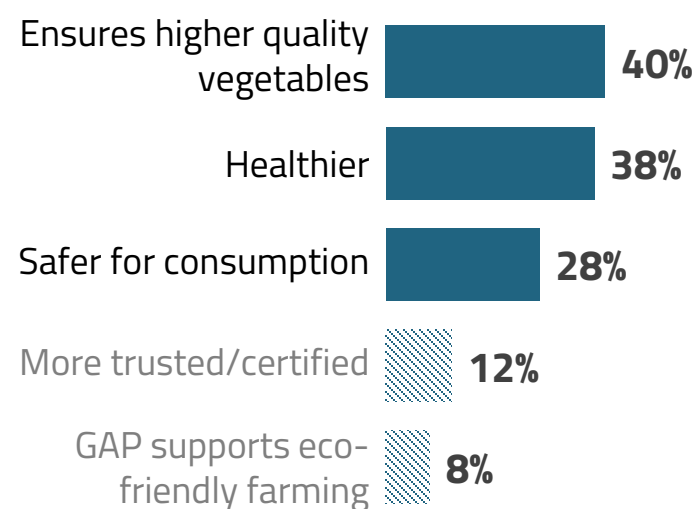
Willingness to buy GAP certified products

Base : n=200



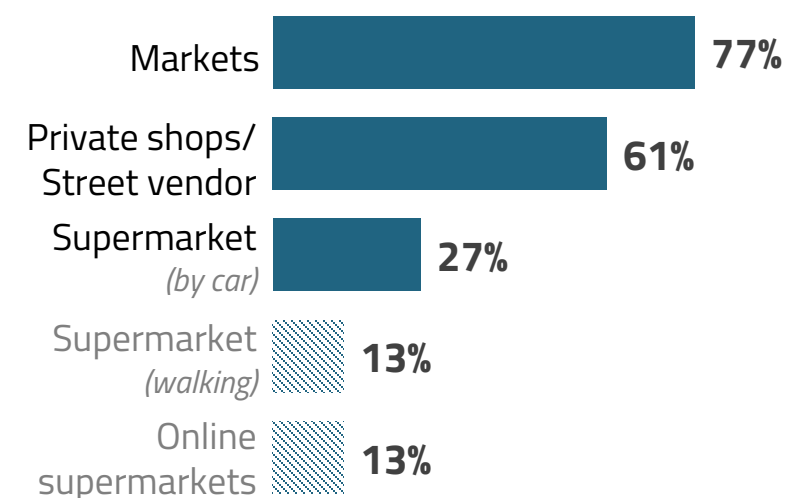
Reasons for saying "Yes"

Base: Among those who said "Yes"

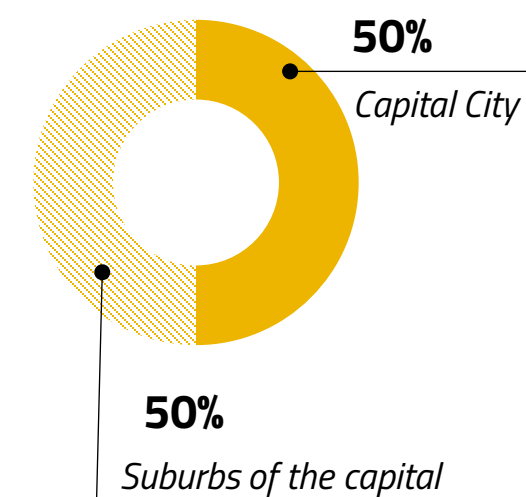


Place to buy vegetables

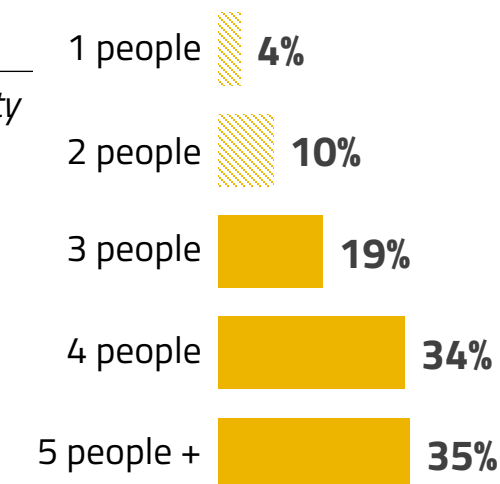
Base : n=200



Cities



Size of household

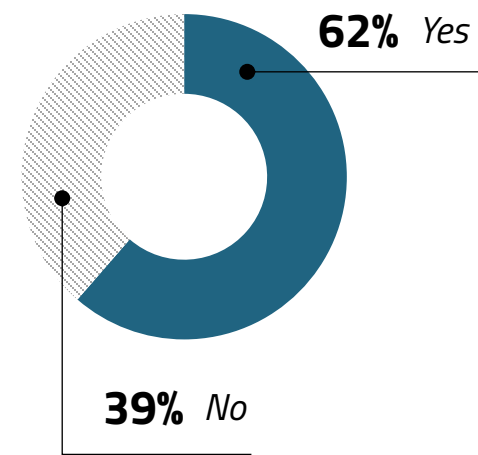




Country-level Details (for reference): Malaysia

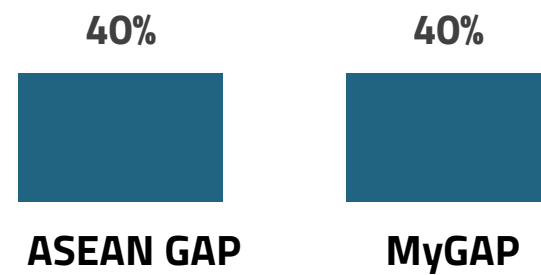
Awareness of GAP

Base : n=200



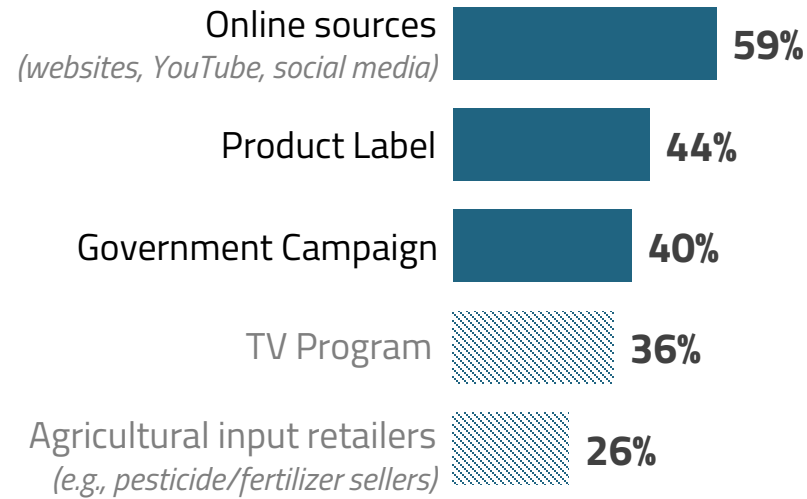
Type of GAPs

Base : n=200

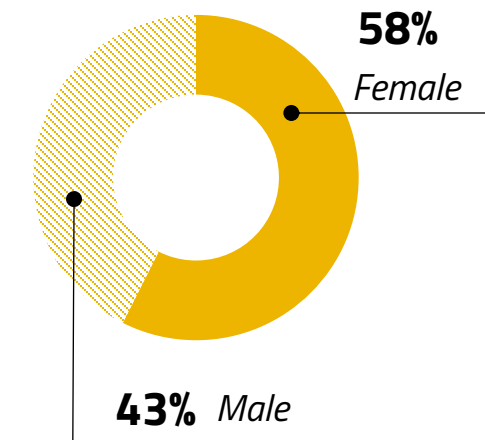


Source of Awareness

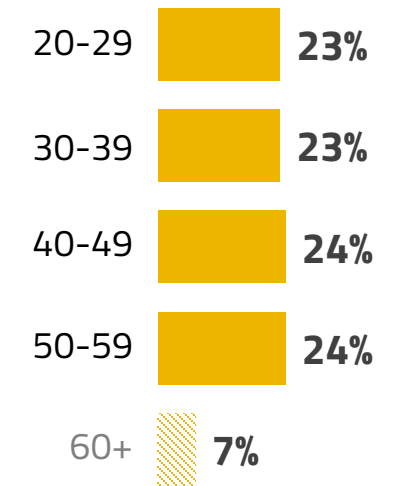
Base: Among those who said "Yes" to awareness of GAP



Gender

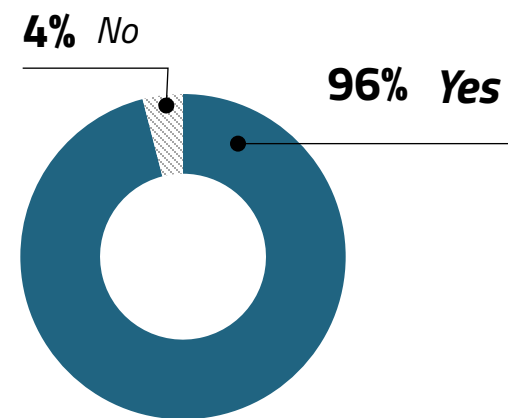


Age



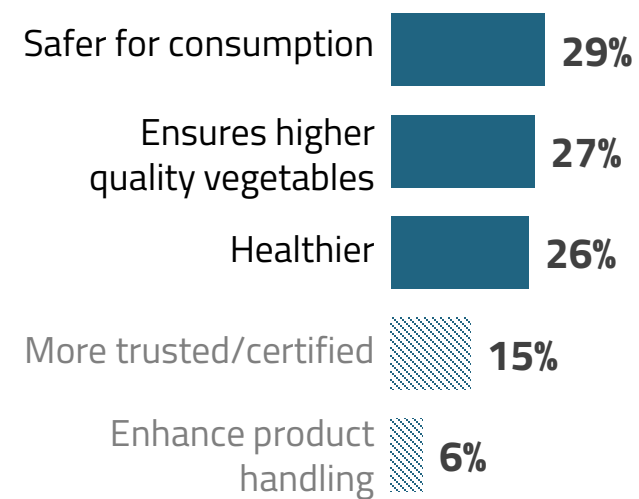
Willingness to buy GAP certified products

Base : n=200



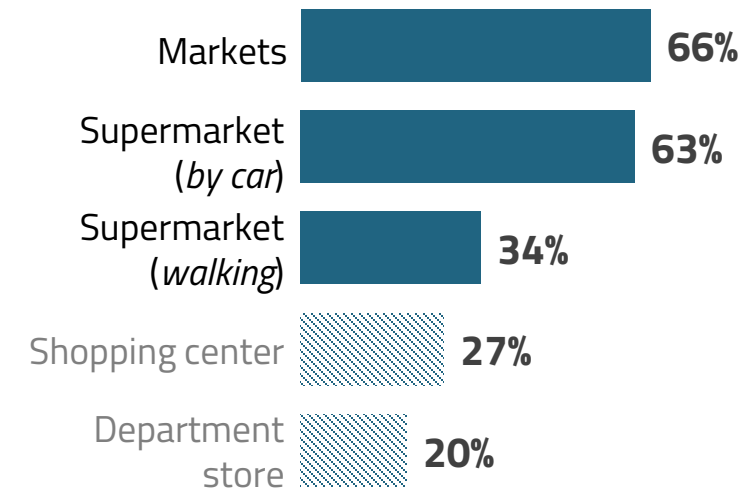
Reasons for saying "Yes"

Base: Among those who said "Yes"

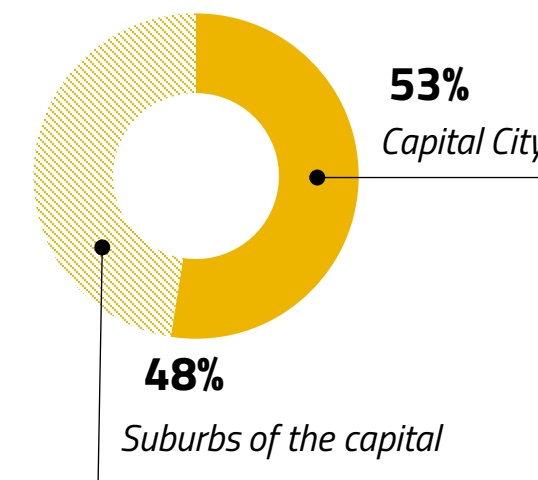


Place to buy vegetables

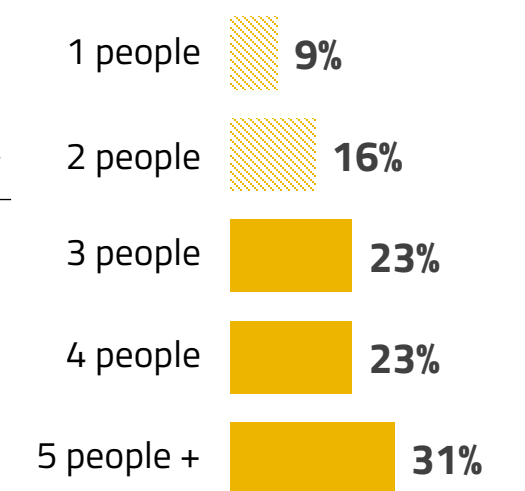
Base : n=200



Cities



Size of household

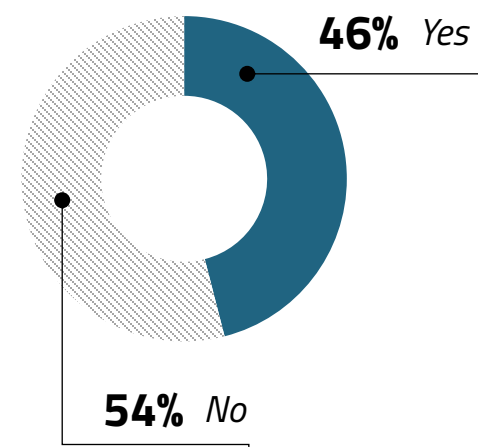




Country-level Details (for reference): Philippines

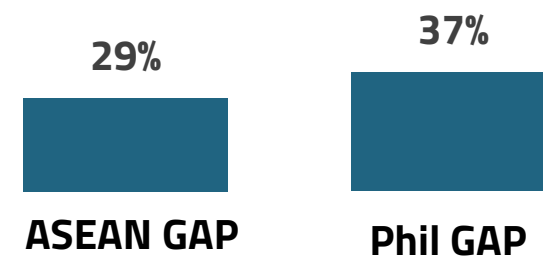
Awareness of GAP

Base : n=200



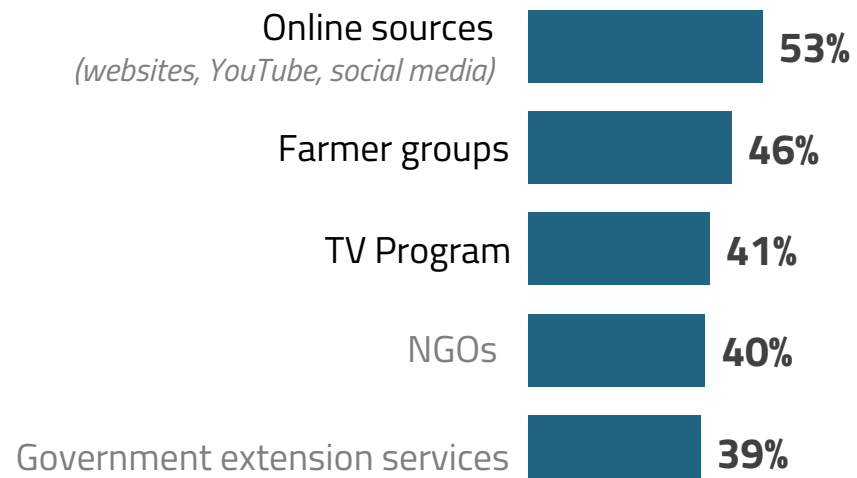
Type of GAPs

Base : n=200

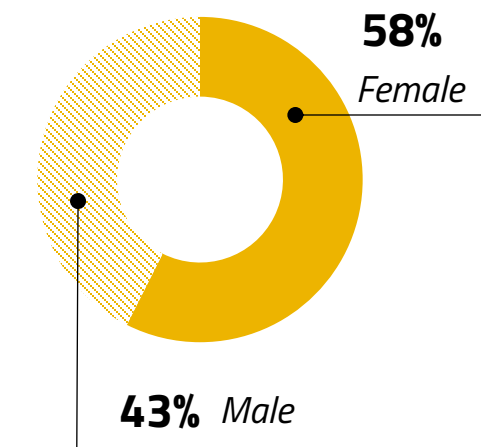


Source of Awareness

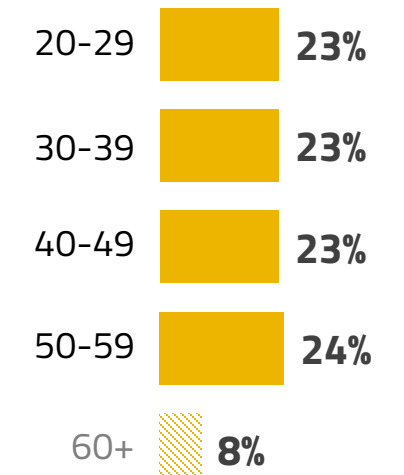
Base: Among those who said "Yes" to awareness of GAP



Gender

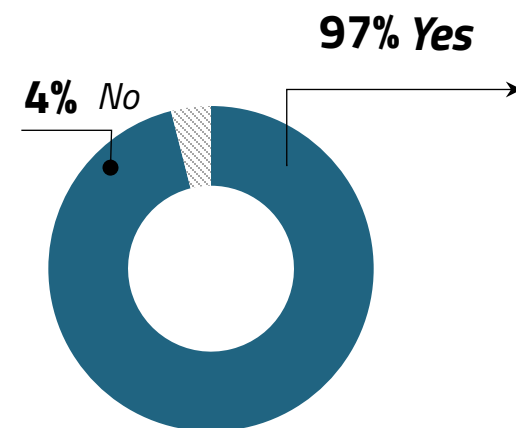


Age



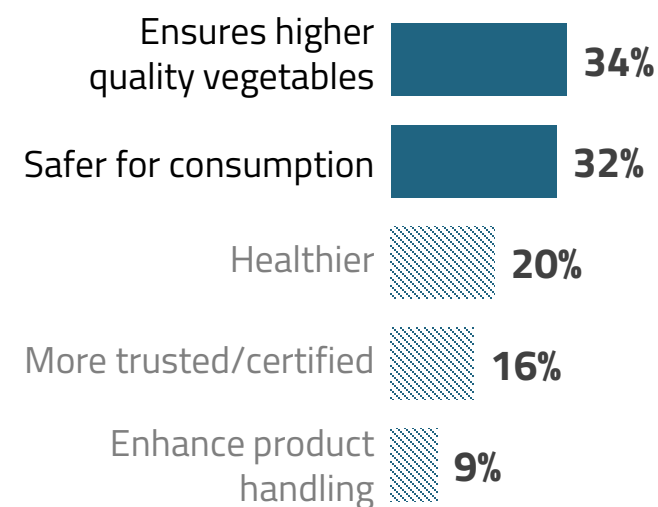
Willingness to buy GAP certified products

Base : n=200



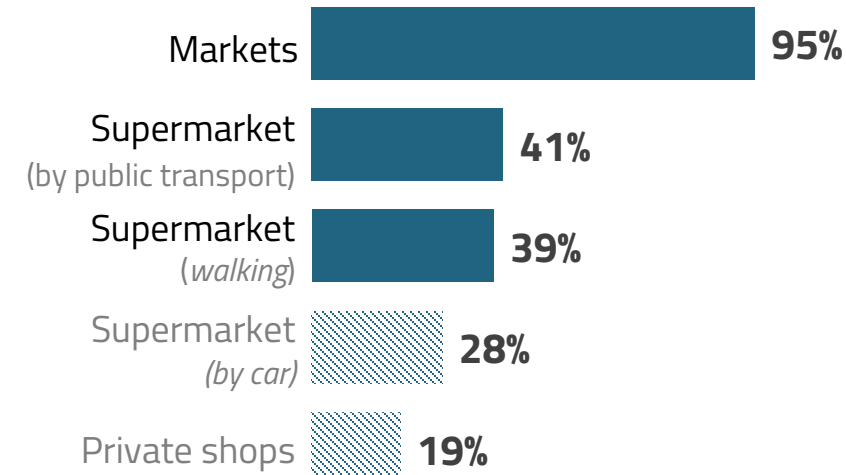
Reasons for saying "Yes"

Base: Among those who said "Yes"

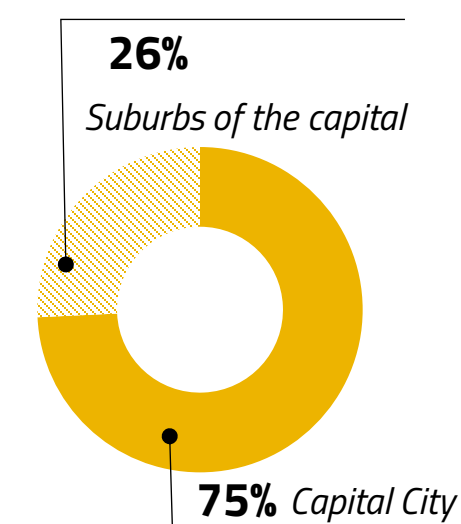


Place to buy vegetables

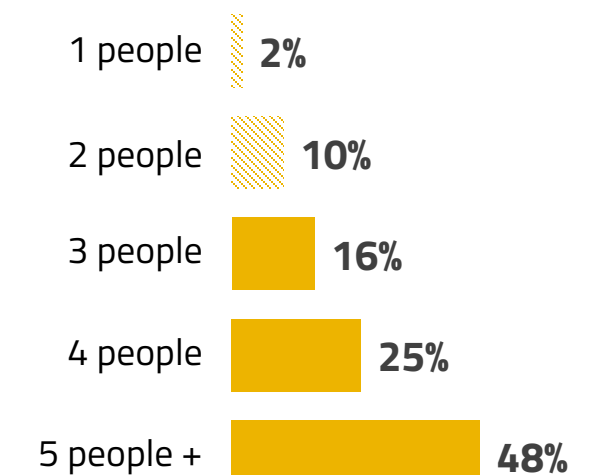
Base : n=200



Cities



Size of household

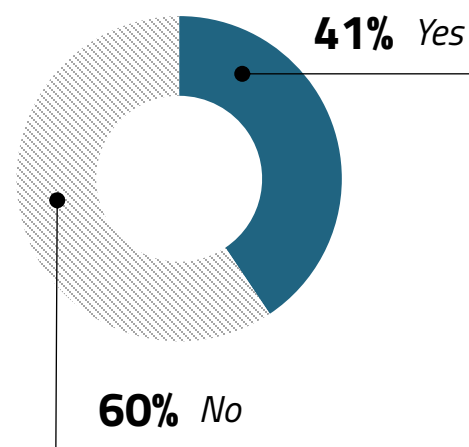




Country-level Details (for reference): Singapore

Awareness of GAP

Base : n=200



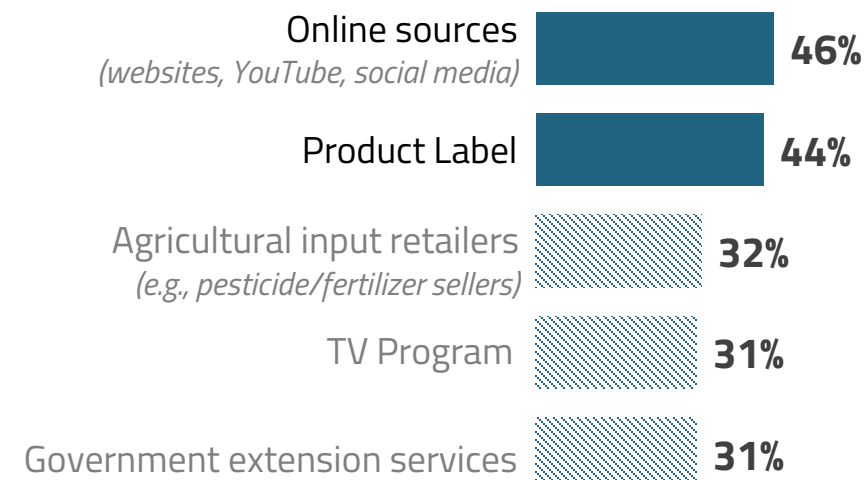
Type of GAPs

Base : n=200

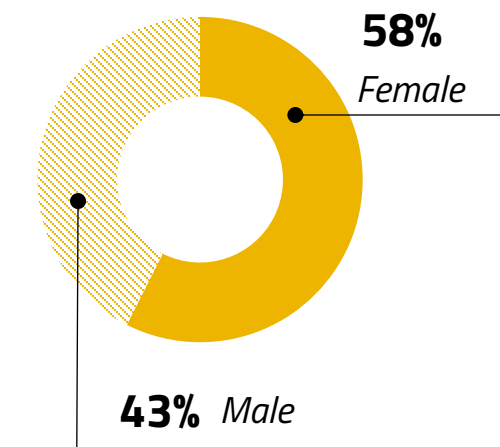


Source of Awareness

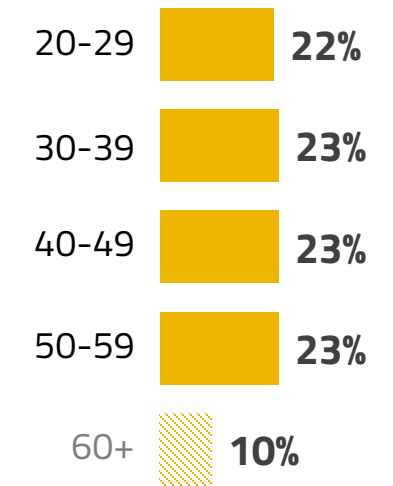
Base: Among those who said "Yes" to awareness of GAP



Gender

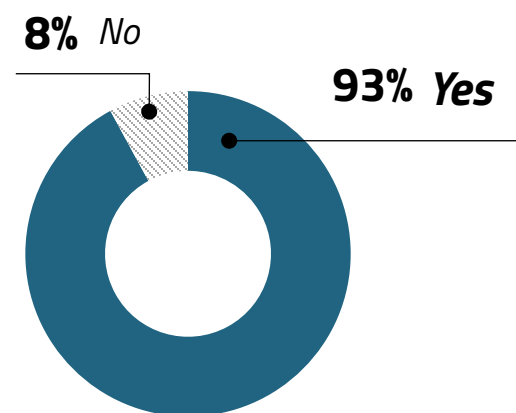


Age



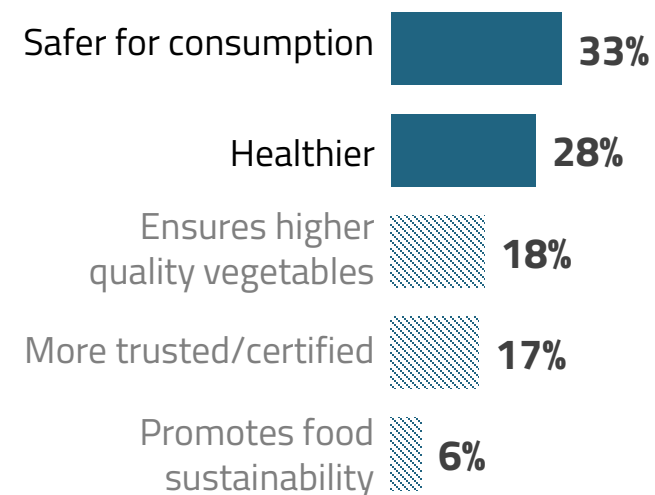
Willingness to buy GAP certified products

Base : n=200



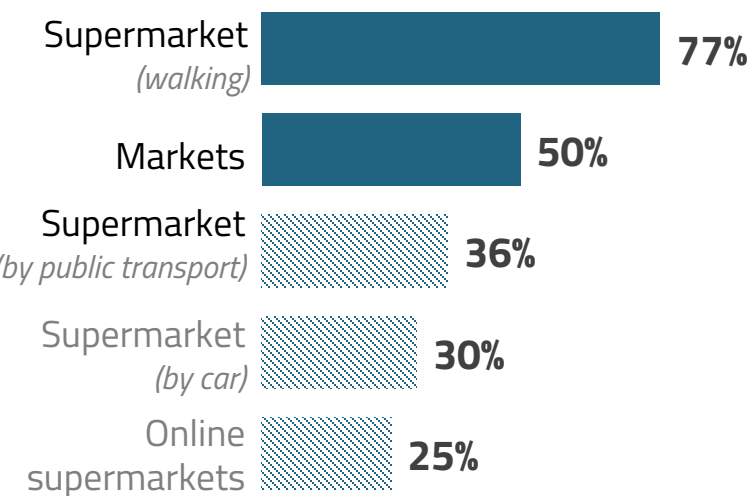
Reasons for saying "Yes"

Base: Among those who said "Yes"

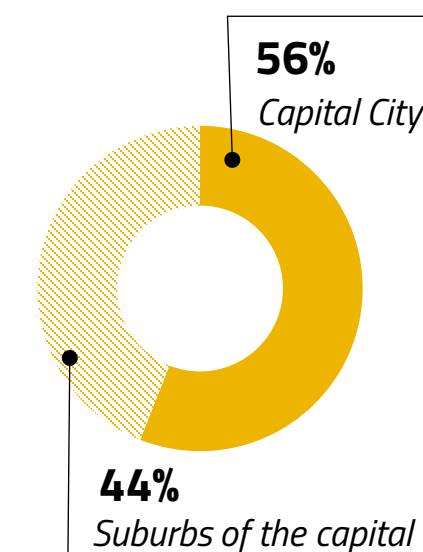


Place to buy vegetables

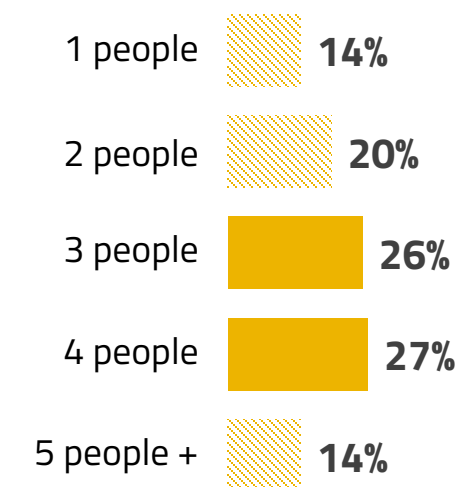
Base : n=200



Cities



Size of household

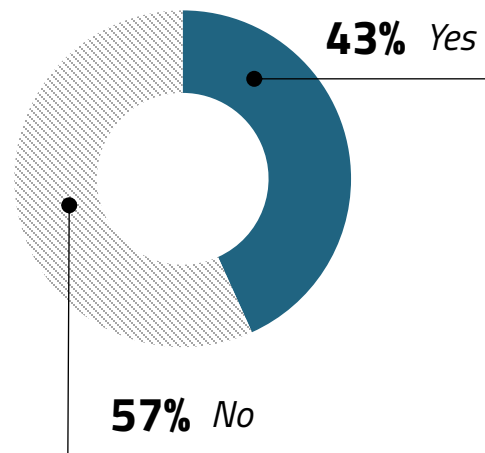




Country-level Details (for reference): Thailand

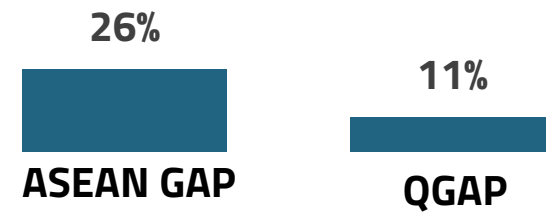
Awareness of GAP

Base : n=400



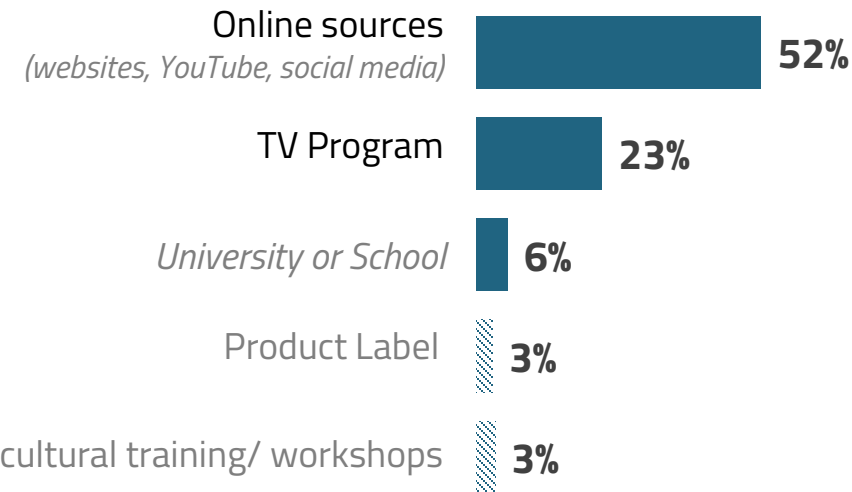
Type of GAPs

Base : n=400

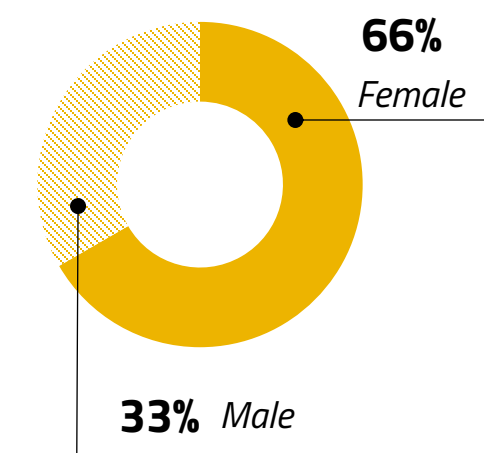


Source of Awareness

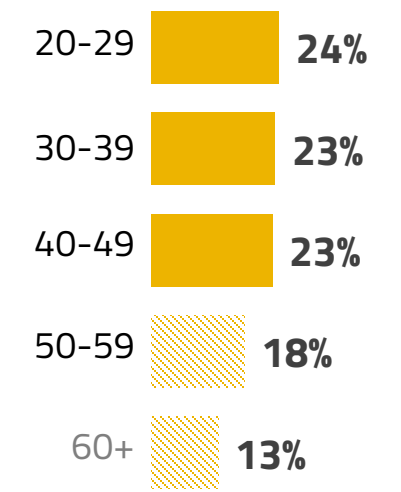
Base: Among those who said "Yes" to awareness of GAP



Gender

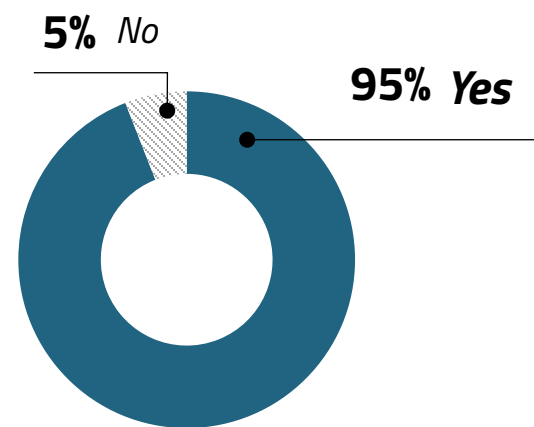


Age



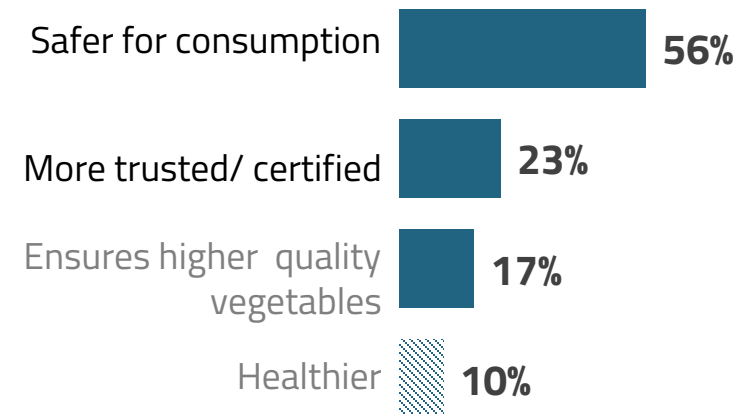
Willingness to buy GAP certified products

Base : n=400



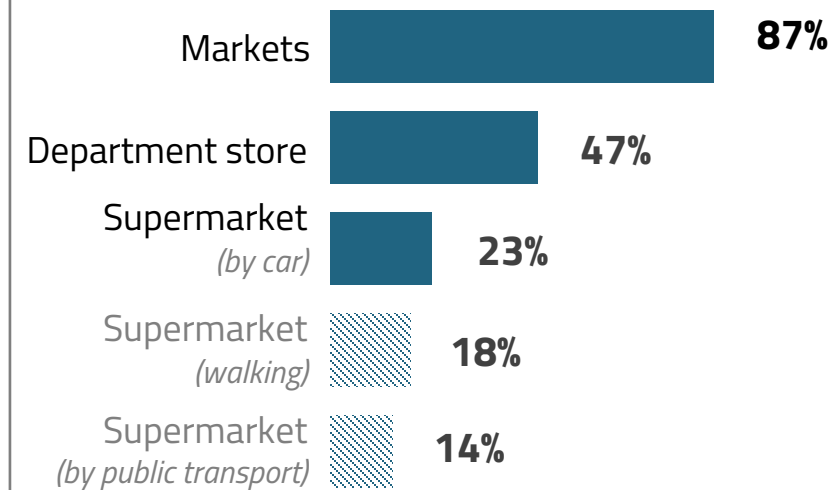
Reasons for saying "Yes"

Base: Among those who said "Yes"

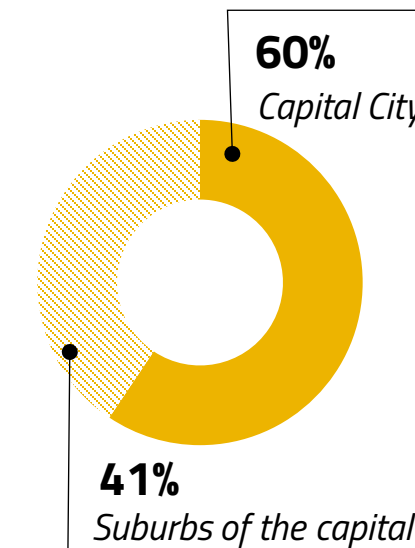


Place to buy vegetables

Base : n=400



Cities



Size of household

