RICE COOKER MARKET STUDY

Updating rice cooker preferences, usage patterns, and purchase behavior in Vietnam's household appliance market

2025 Mar

InsightAsia

To examine rice cooker usage patterns, preferences, and purchase behaviors across Vietnam to inform product development and marketing strategies for manufacturers and retailers in this competitive category.

Objectives

1. **Understand current rice cooker usage patterns**
   - Map current rice cooker type ownership and usage frequency
   - Identify pain points and satisfaction levels with current products

2. **Evaluate consumer preferences and purchase behavior**
   - Identify key purchase drivers and barriers
   - Measure feature preferences across demographic segments
   - Determine price sensitivity for different rice cooker types

3. **Analyze competitive landscape**
   - Measure brand awareness, consideration and usage
   - Evaluate brand positioning and perceived strengths
   - Identify gaps and opportunities in the market

Survey Design

Methodology: Online quantitative survey.

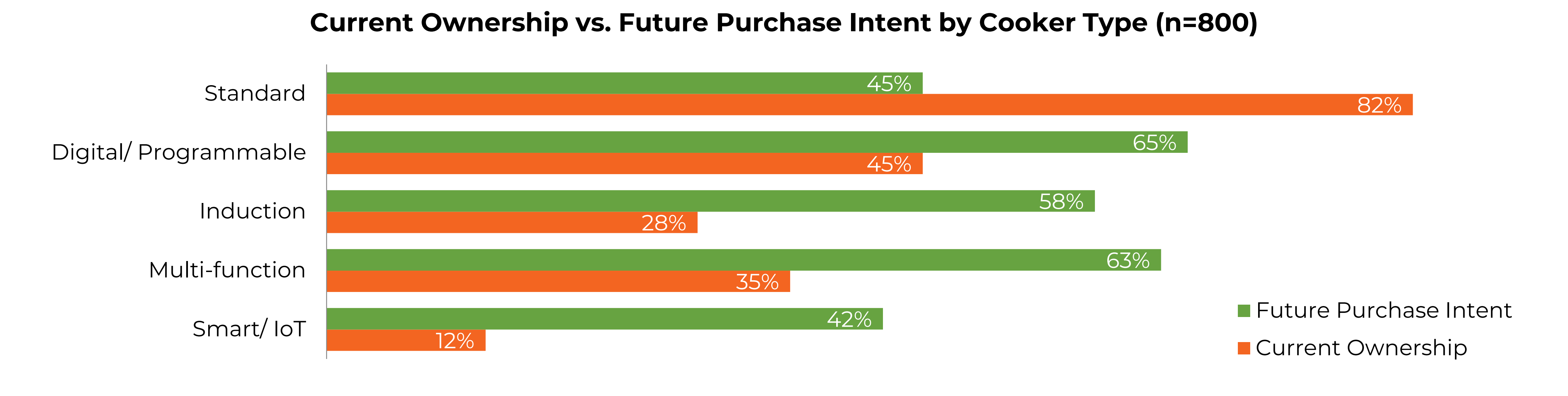
Target respondents:

1. **Demographics:**
   - Male & female aged 25-55 years.
   - SEC ABC.
   - Urban areas & semi-urban areas of 6 key cities: HCMC, Hanoi, Da Nang, Can Tho, Hai Phong, Nha Trang.
2. **Behavioral criteria:**
   - Primary or joint decision-maker for household appliance purchases.
   - Current rice cooker owner.
   - Uses rice cooker at least 3 times per week.
   - Mix of recent purchasers (past 2 years) and those planning to purchase in next 12 months.

Sample size: 800.

The Results

Rice Cooker Type Ownership & Future Intent

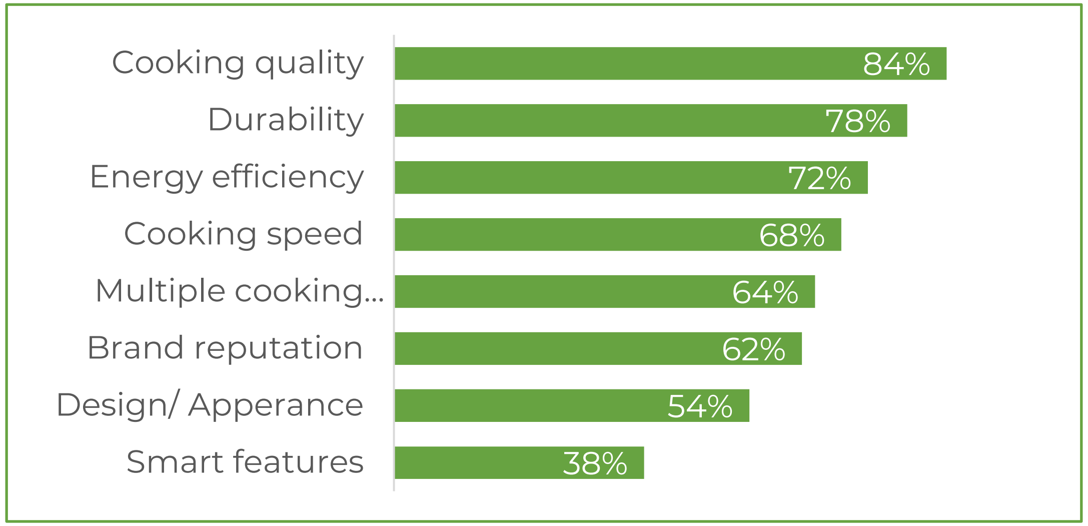


Key Insights:

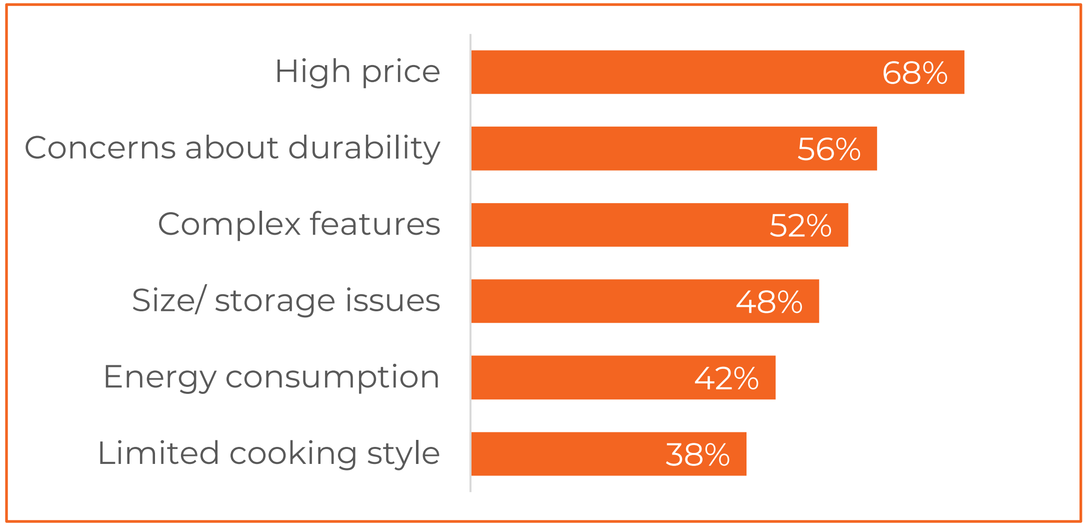
- Standard rice cookers dominate current ownership (82%), but future purchase intent indicates a significant shift toward digital/ programmable (65%) and multi-function models (63%).
- Induction rice cookers show strong future purchase intent (58% vs. current 28% ownership), reflecting growing awareness of their improved cooking performance.
- Smart/ IoT-enabled rice cookers show the largest growth potential (12% current ownership vs. 42% future intent), particularly among younger, urban consumers.
- The data suggests Vietnamese consumers are increasingly seeking more sophisticated rice cooker technology that offers versatility beyond basic rice cooking.

Key Purchase Drivers & Barriers

Top Purchase Drivers for Rice Cookers (n=800)



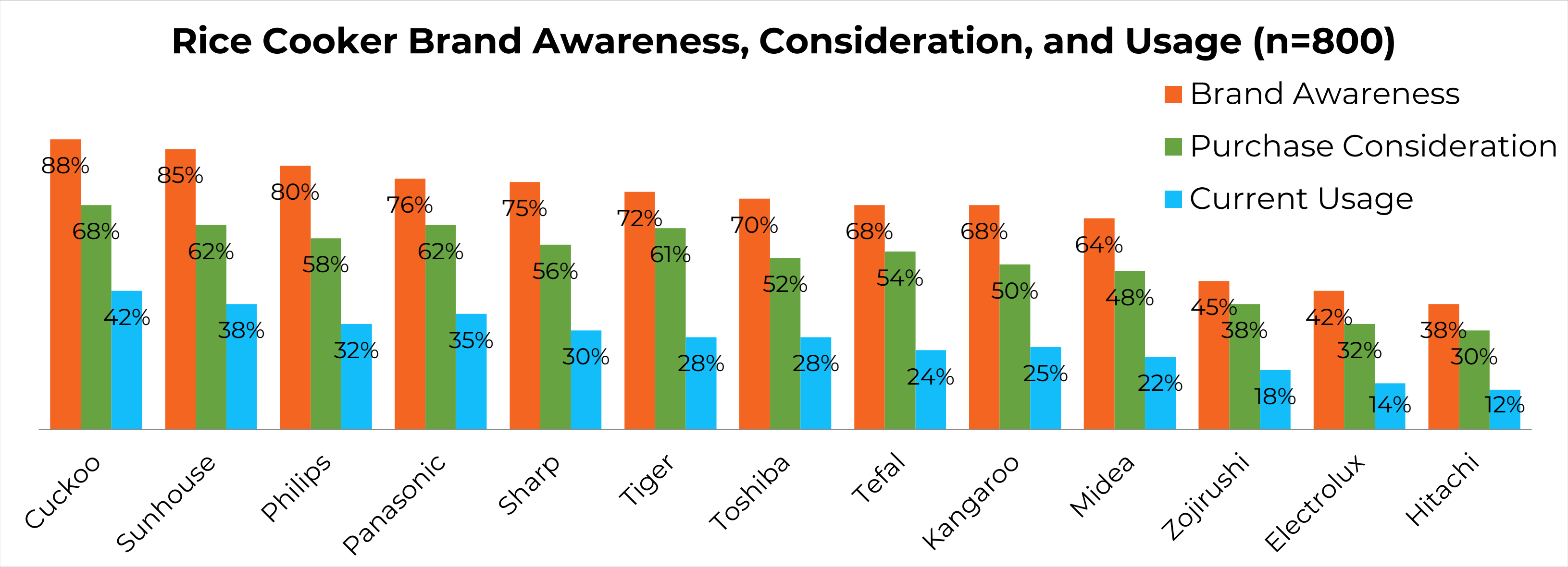
Top Purchase Barriers (n=800)



Key Insights:

- Rice cooking quality (84%) remains the fundamental purchase driver, reinforcing that core performance is still paramount despite technological advancements.
- Durability (78%) and energy efficiency (72%) rank significantly higher than smart features (38%), highlighting Vietnamese consumers' practical priorities.
- Price concerns (68%) represent the primary barrier to upgrading rice cookers, particularly for premium induction and smart models.
- Complexity concerns (52%) present a significant barrier for older consumers and those in semi-urban areas, suggesting a need for user-friendly design even in advanced models.

Brand Performance Metrics



Premium Segment Leaders

1. Cuckoo (Korea)	42% usage
2. Tiger (Japan)	28% usage
3. Zojirushi (Japan)	18% usage

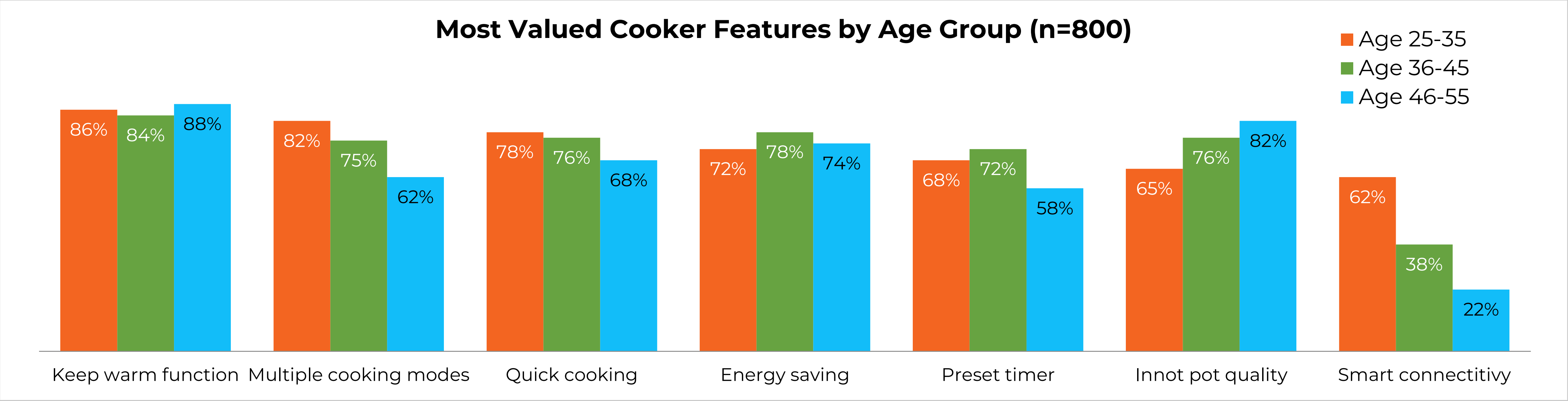
Consideration-to-Awareness

1. Tiger (Japan)	85%
2. Panasonic (Japan)	82%
3. Cuckoo (Korea)	77%

Key Insights:

- Korean premium brand Cuckoo maintains market leadership with 88% awareness and 42% usage, particularly strong in northern Vietnam.
- Japanese premium brands collectively demonstrate strong performance with Tiger (72% awareness) showing the highest consideration-to-awareness ratio (85%) among all brands.
- Ultra-premium Japanese brand Zojirushi, despite lower awareness (45%), maintains impressive consideration-to-usage conversion (47%), indicating strong performance within its niche target segment.
- Domestic brand Sunhouse (85% awareness) maintains strong market presence but faces challenges converting awareness to usage (45% conversion).
- European brands (Tefal, Electrolux) show moderate performance with stronger presence in urban centers and among higher-income segments.

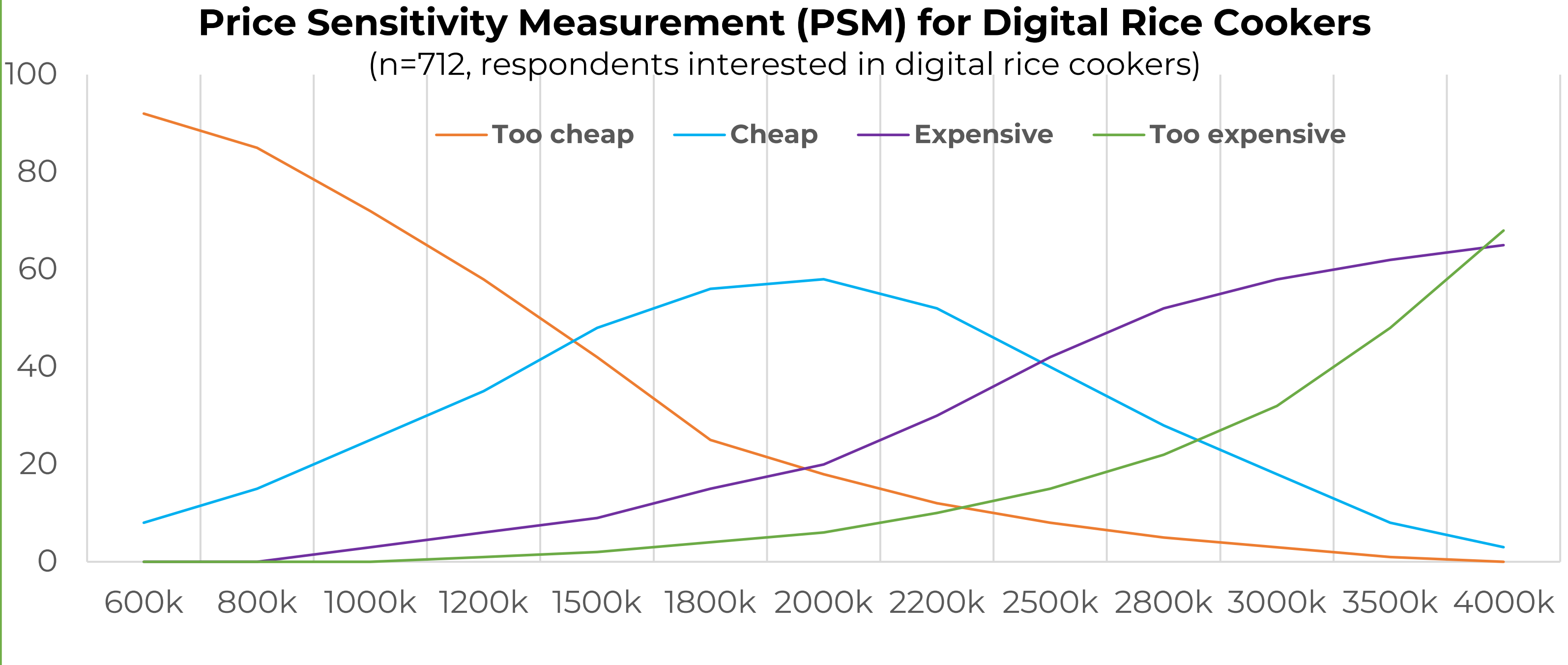
Feature Preferences by Consumer Segment



Key Insights:

- The "keep warm" function remains universally important across all age groups (>84%), reflecting its critical role in Vietnamese household meal patterns.
- Multiple cooking modes show a clear age gradient, with younger consumers (25-34) valuing this feature significantly more (82%) than older segments (62% for 45-55), indicating evolving cooking versatility needs.
- Inner pot quality is particularly important to older consumers (82% for 45-55 group), who often prioritize durability and cooking performance over technological features.
- Smart connectivity features demonstrate the most dramatic age difference (62% for 25-34 vs. 22% for 45-55), highlighting a generational technology adoption gap.
- Energy saving features show consistent importance across age groups, though slightly higher among middle-aged consumers (35-44) who often have larger households and higher electricity costs.

Price Sensitivity Analysis



Pricing Strategy Implications:

The optimal price of 2500K VND represents the sweet spot for digital rice cookers in the Vietnamese market. A tiered pricing strategy with entry-level models at 1800K-2000K VND and premium options at 2800K-3000K VND would effectively cover key market segments while maintaining quality perceptions.

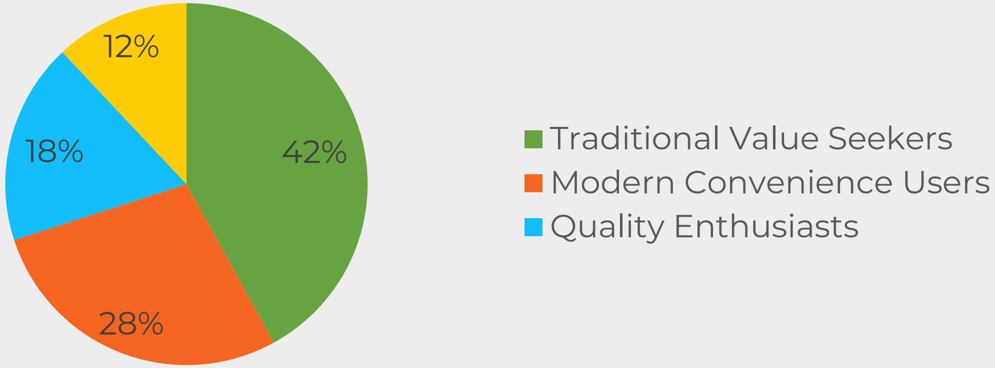
Regional pricing strategies should be considered given the significant urban/ rural price sensitivity differences.

Key Insights:

- **Optimal price point:** 2500K VND (intersection of "cheap" and "expensive" curves)
- **Acceptable price range:** 1800K – 3000K VND
- **Price stress threshold:** Above 3500K VND (steep rise in "too expensive")
- **Quality perception threshold:** Below 1500K VND (steep rise in "too cheap")
- Urban consumers in HCMC and Hanoi demonstrate 20% higher price tolerance compared to tier-2 cities.
- Premium features can command up to 30% price premium when effectively communicated, particularly among higher-income segments

Rice Cooker Consumer Segments

Consumer Segment Distribution



Traditional Value Seekers (42%)

- Predominantly older (45-55), mix of urban and rural
- Prioritize simplicity, reliability, and familiar brands.
- Prefer standard and basic digital rice cookers.
- High price sensitivity, reluctant to pay for advanced features.
- Traditional cooking habits, rice-focused meals.

Modern Convenience Users (28%)

- Mid-age (35-44), dual-income families.
- Value time-saving features and versatility.
- Prefer digital and multi-function rice cookers.
- Moderate price sensitivity, willing to pay for convenience.
- Diverse cooking needs, frequent entertainers.

Quality Enthusiasts (18%)

- Mixed age groups, higher income, urban areas.
- Prioritize premium cooking results and durability.
- Prefer induction and high-end models.
- Low price sensitivity, focus on performance and longevity.
- Health-conscious, quality-focused food preparation.

Tech-Forward Cooks (12%)

- Younger (25-34), higher-income urban professionals.
- Early adopters of technology, digitally connected.
- Prefer smart rice cookers with app connectivity.
- Moderate price sensitivity, value innovation.
- Experimental cooking style, social media sharing.

Target Segment Opportunity:

- The "**Modern Convenience Users**" segment (28%) represents the most promising primary target for new digital and multi-function rice cookers, offering substantial market size combined with willingness to invest in useful features.
- The "**Quality Enthusiasts**" segment (18%) is ideal for premium induction models, with their focus on cooking performance and lower price sensitivity.
- While the "**Tech-Forward Cooks**" segment is smallest (12%), it offers significant growth potential for smart rice cookers and can drive innovation adoption that may eventually mainstream to larger segments.
- The "**Traditional Value Seekers**" remain the largest segment (42%) but require different messaging focused on reliability and value rather than advanced features

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We Are

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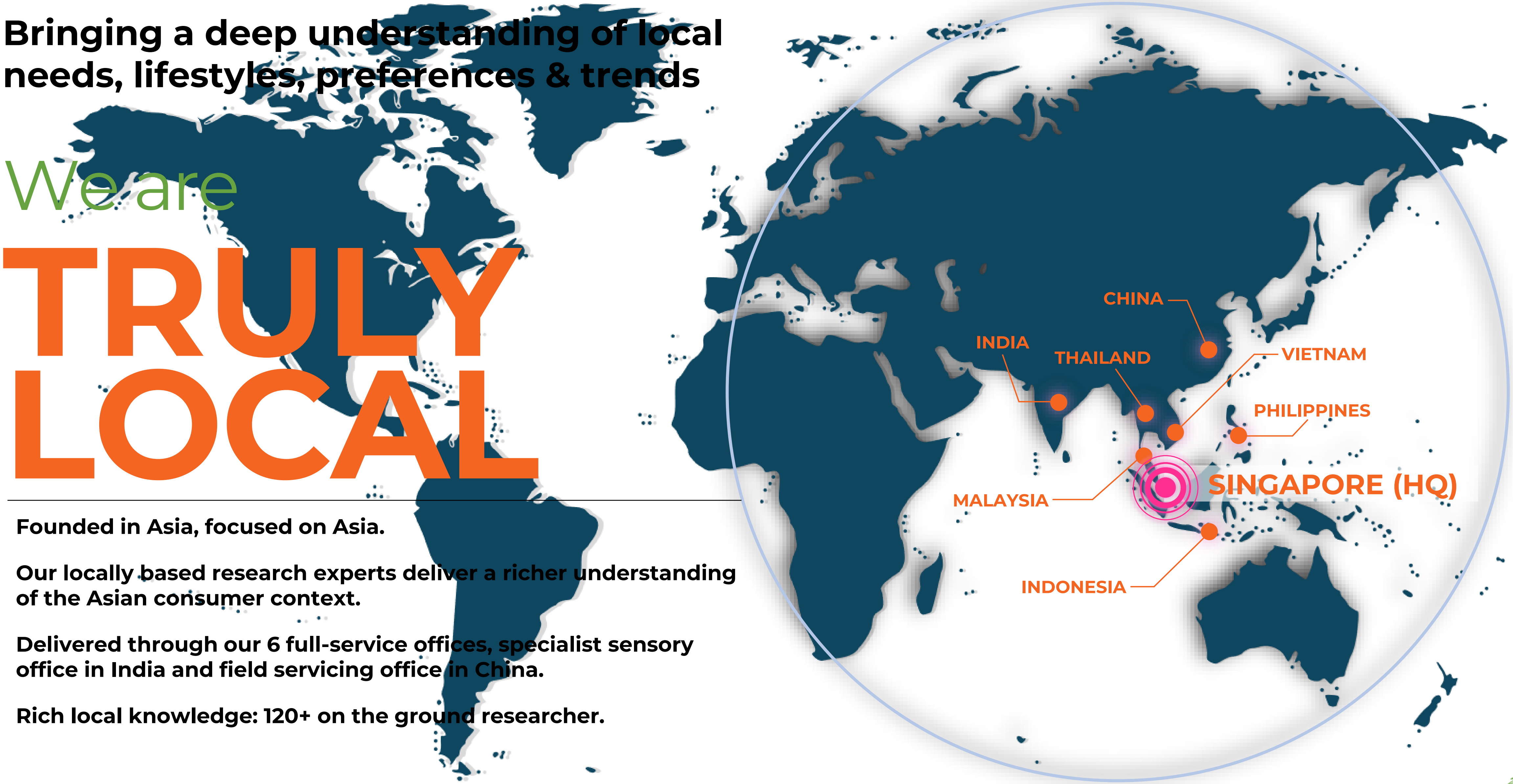
Bringing a deep understanding of local needs, lifestyles, preferences & trends



We are

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Founded in Asia, focused on Asia.

Our locally based research experts deliver a richer understanding of the Asian consumer context.

Delivered through our 6 full-service offices, specialist sensory office in India and field servicing office in China.

Rich local knowledge: 120+ on the ground researcher.

We Are

SMALL enough to care & BIG enough to trust

We champion innovative research

Technical rigor and quality control, combined with research passion, creativity and smarter thinking

We bring real local knowledge

To provide 'up to the minute' understanding of the evolving competitive & consumer context

Our Clients Trust Us
Because We Understand

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- The need for practical and actionable solutions.

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Across Industries

...and more

(B2C) What we do

Survey: F2F/ Online

Focus Group

Home Usage Test

Central Location Test

Along shopping

Retail check/ audit

Ethnography

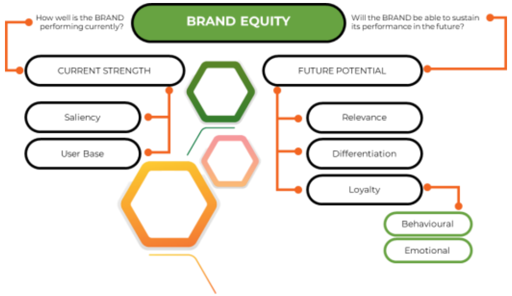
Mystery shopping

(B2B) What we do

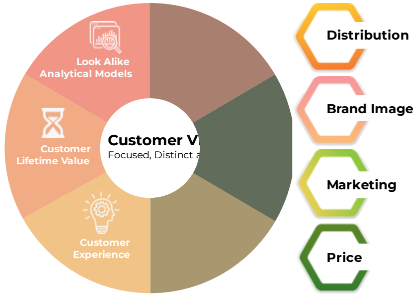
Survey: F2F/ Online

In-depth Interview

Competitor Analysis



Market Analysis



ROMI Analysis

Ideation Workshop

Mr. Pham Anh Tuan

Research Director, Country Manager || VIETNAM

Tuan is a seasoned senior marketing research with over 15 years of expertise, **specializing in B2B marketing research**. His focus is on market exploration and penetration studies within various sectors, both locally and regionally. With a **unique background in IT and market research**, Tuan leverages his technical skills to enhance data analysis and market insights, providing a comprehensive understanding of market dynamics.

Renowned for his **analytical skills** and **consultative approach**, Tuan has contributed significantly to the understanding of consumer trends and market dynamics.

Tuan's insights are occasionally featured in local newspapers i.e. Dan Tri, Tuoi Tre Online, and on Vietnam primary TV channels VTV1 VTV3 VTV9, where he shares his expert vision on the evolving markets.

2009 – 2016	2016 – 2021	2021 – 2023	2024 – Now
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