

Multicultural Market Analysis: Cambodian, Vietnamese Seafood



Focus Group Summary and Analysis

When you listen to communities of color, new markets, relationships, and opportunities open up.

The Current Maine Seafood Industry

The Maine seafood or ground fishing industry has been shrinking. As the workforce is aging out, young people are not replacing them. The ground fishing industry was a cornerstone of Maine's natural resource economy; now there are less than ten ground fishing boats landing at Maine's only Fish Pier Auction House. Regulations such as lobsters caught in ground fishing are not allowed to be sold in Maine and many groundfishermen are charting their way to Gloucester, MA. According to the Portland Fish Exchange, the groundfish catch landing was over thirty million pounds 30 years ago, and today, the catch landing is less than two million pounds. During the height of the pandemic, with less demand because of economic woes, lack of workers and inability to fish because of the pandemic and regulations on lobsters caught in ground fishing the Portland Fish Exchange reported that it landed fewer than 750,000 pounds of fish.¹ In the month of May of 2022, there were no landings at the Portland Fish Exchange. This hurt the industry that was already struggling.

¹ chrome-extension://efaidnbmninnbpcjpcglclefindmkaj/https://www.pfex.org/uploads/board/meeting%20materials/bod_packetjan22.PDF

Purpose

The exploration and analysis of this new market potential was conducted by:

- Tae Chong, Program Director, Director of Maine State Chamber of Commerce
- Richard Bilodeau, Professor of Marketing, USM School of Business
- Theary Lang, Cambodian navigator, and interpreter
- Lien Hoa Pham, Vietnamese navigator, and interpreter
- Maine Coastal Fishermen's Association - assisted with the design of the seafood questions

In Winter, 2022, we set out to discover more about the seafood purchasing and consumption habits of two ethnic groups, Vietnamese, and Cambodian families. We wanted to answer the following questions:

Cambodian and Vietnamese Community in Maine Seafood Questions

- *Do you eat seafood? If so, how often do you eat seafood? Why not?*
- *How do you buy seafood? (tinned, canned, whole, fileted, frozen, value-added, etc.)*
- *Do you order seafood in restaurants? Why or why not?*
- *Where do you buy seafood? (grocery store, fish market, ethnic shop, etc.)*
- *What types of seafood are significant to your cultural dishes? If you cannot find those species in Maine, are there good Maine seafood substitutes?*
- *How do you prioritize seafood decisions? (price, origination, sustainability, recipes, etc.)*
- *Where do you get your information about seafood in general, and Maine seafood specifically?*

We connected with Cambodian and Vietnamese volunteer participants who had heard about the project through our trusted cultural navigators in Theary Lang and Lien Hoa Pham. Without our cultural navigators, we would have struggled to get older participants and people who had never participated in a survey to join us for a conversation on seafood consumption. Our cultural navigators drew participants from Portland, South Portland, Westbrook, Scarborough, Biddeford, Saco, Sanford, and Augusta. The post-Covid surge forced our communication to be either in small focus groups or completed through surveys.

- Vietnamese surveys: Our cultural navigator surveyed 20 Vietnamese heads of household from ages twenty-five up to 80 in January and February 2022. The majority of the participants were between the ages of 40-50 years of age, and it was roughly a 60/40 split of women head of household to men. While we were interested in gender and income diversity, we wanted to ensure that we were meeting with the members of the household who made the food shopping decisions for the family. Each participant was called, and the conversations recorded, translated, and coded for Professor Bilodeau for our research project.
- Cambodian small focus groups: Our cultural navigator and project facilitator lead the conversations with 20 Cambodian adults in January and February 2022. We held one focus group primarily made of English-speaking participants and their ages were between 25 and 50 years old. In the second group, we had participants between 25 to 80 years old and Theary interpreted the conversation. Many were excited about the questions and answered in English so that I could understand how important cultural food was to them. The focus group discussions were recorded, and the answers were coded.

- Cambodian event survey: At the Cambodian New Year event in April 2022, in Buxton, Maine, we surveyed those who came to our tent. We offered 5-pound bags of green crabs at no cost. We received surveys from both English and non-English speaking participants and recorded their answers on a survey co-written by Maine Coastal Fishermen's Association. We worked with interpreters who were at the New Year's celebration, as we set a goal to get as much information from those who did not speak English well. We received thirty surveys in total, twenty of which required translation.

A Note on the Data

Maine's small number of people of color, immigrant, and refugee populations is difficult to extrapolate from the total US Census data because the US Census does not have data sets for people of color populations less than 10,000 people in one geographic area. The Cambodian, and Vietnamese communities are less than 5,000 people combined, and these populations are spread throughout Southern Maine. Thus, no datasets for these specific populations are readily available in the US Census Report. Most of the data from the US Census are estimates from those who were born in Cambodia and Vietnam—which would not include US-born Cambodians and Vietnamese. This report includes data from the Migration Policy Institute, an international nonpartisan research and analysis organization, the Office of the Mayor Boston, Massachusetts, Selig Institute and the University of Massachusetts, Boston.

Maine Vietnamese American Community

The Vietnamese American Community is one of the oldest Asian refugee populations in Maine stemming from the Vietnam War era, over 40 years ago. Vietnamese Americans were resettled through Catholic Charities' Refugee Immigrant Services in the 1980s and early 1990s. Family reunification brought thousands of Vietnamese families to the US in the following decades.

Today, the total Vietnamese population in Maine numbers 1,479,² according to the 2019 Migration Policy Institute. Initially, many families lived in Portland, largely in the area's public housing neighborhoods. As the Vietnamese community integrated into the existing neighborhoods, they generally improved their economic status, moved out of the city, and now reside in surrounding towns, including South Portland, Westbrook, Scarborough, Biddeford, Saco, Sanford, and Portland. Today, the Vietnamese population in the greater Portland region numbers about 840 children and adults.³ Like so many Maine communities, many younger generations are moving outside Maine for more opportunities and the Vietnamese population is shrinking in Maine but growing in Southern Massachusetts.

The greater Boston area is home to over 53,000 Vietnamese children and adults,⁴ centered in the Boston, Quincy, Lowell, and Dorchester regions. The majority of Vietnamese live in Dorchester, which boasts almost 30 Vietnamese grocery stores, including 3 CMarts. Cmart is a Chinese-owned grocery store founded in Boston to cater to Chinese and Vietnamese communities. There

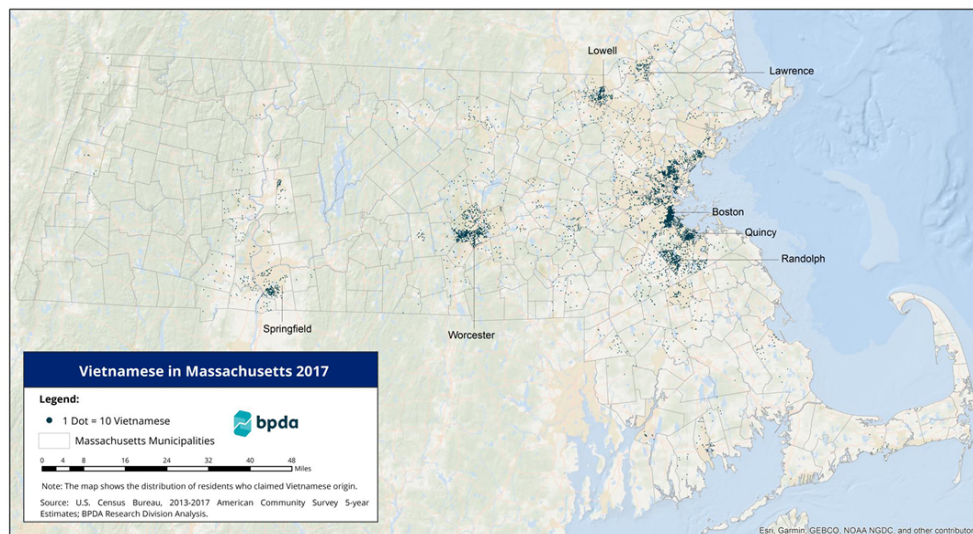
² <https://www.migrationpolicy.org/data/state-profiles/state/demographics/ME>

³ <https://stacker.com/maine/portlandme/biggest-sources-immigrants-portland-maine>

⁴ chrome-extension://efaidnbmnnnibpcajpcglclefindmkaj/http://www.bostonplans.org/getattachment/b8d7569f-8de8-4518-b219-b1c0326b56f5

are now 5 C Marts in Massachusetts. Dorchester is critical to the Vietnamese commercially and culturally with nearly two hundred Vietnamese-owned shops. The city of Boston has recognized the cultural contributions of the Vietnamese community in Dorchester, officially naming a portion of the town, “Little Saigon.”

The 53,700 Vietnamese in Massachusetts live primarily in Boston, Quincy, Randolph, Lowell, and Worcester.



The Importance of the Maine Vietnamese Population to Maine’s Seafood Sector

The Vietnamese population is one of largest consumers of seafood in the world. According to Ourworldindata.org, (a collaborative effort between researchers at the University of Oxford and the non-profit organization, Global Change Data Lab), the average US adult consumes about sixteen pounds of seafood annually, whereas the average Vietnamese adult consumes about eighty-three pounds of seafood.⁵ Additionally, Vietnamese families, like other immigrant and refugee populations, have larger families. The Migration Policy Institute reports that immigrant populations in Maine average 3.14 people per household, whereas the average Maine household is 2.5.⁶

The Maine Department of Marine Resources has advised that to grow Maine’s seafood industry, younger generations need to be targeted.⁷ In the Power of Seafood report by the Food Industry Association, researchers purported that people with higher incomes and younger generations are ideal target markets.

Vietnamese populations have a larger than average household, consume more seafood than the average US household, and additionally, the Asian population in Maine and US has a higher per capita income than the average white population. The majority of Vietnamese in Maine live in

⁵ <https://www.intrafish.com/markets/us-seafood-per-capita-consumption-sets-record-but-thats-not-the-full-story/2-1-1013749>

⁶ <https://www.migrationpolicy.org/data/state-profiles/state/demographics/ME>

the three southern counties: Androscoggin, Cumberland, and York.⁸ The per capita income of Asians living in Androscoggin in 2019 was \$97,194 and in Cumberland, \$87,934.⁹ The Maine average household income in 2019 was \$58,924.¹⁰ The Vietnamese community and other immigrant and refugee communities may be the future of Maine's seafood industry.

Snapshot of Vietnamese-Owned Businesses in Maine

Two Vietnamese-owned grocery stores in Portland sell ethnic produce, protein, and seafood. A number of Vietnamese-owned sea harvesting outfits, including sea urchin farmers, are active on our coast. One Vietnamese fishmonger, Quang Nguyen, is the owner of Fishermen's Net in Brunswick. Notably, Mr. Nguyen reported that nearly 80% of his customers are Asian. They come to his store to purchase items they cannot get in major chain stores and a sizable percentage of his \$3 million store revenues come ecommerce sales, shipping Maine shellfish to cities across the country with large Vietnamese populations such as Houston, Portland, Oregon, and Los Angeles. He exports native Maine Lobsters, Jonah crabs, whelk, and razor clams. Whelk and Jonah crabs are byproduct catches of lobsters and while he collaborates with several lobstermen to harvest them, they are not commercially fished for his consumers. Ironically, in order to ship his razor clams, one of his best sellers, Mr. Nguyen must turn to Boston to get the supplies necessary to ship them out across the country.



⁸ <https://datausa.io/profile/geo/maine>

⁹ <https://datausa.io/profile/geo/maine>

¹⁰ <https://datausa.io/profile/geo/maine>



Fishermen's Net Maine

Yesterday at 9:49 AM · 🌐

Hôm nay em có 1 ít cá cam, anh chị ủng hộ em với ạ, cá TƯƠI đã đc làm sạch ruột - SASHIMI GRADE (ăn sống được), hoặc nướng hoặc nấu cháo là hết sảy ạ

1 con nặng 2.5-4 lb

10 lb \$250 (tầm 3-4 con)... See more

[See Translation](#)



Focus Group Results: Vietnamese American Participants

Most of the participants shared that they were able to meet their produce and protein needs through the large supermarket chains, such as Hannaford, Sam's Club, BJ's, and Market Basket. However, all the participants reported they shop the local Asian grocery stores for ethnic

produce, spices, and protein, including frozen seafood. About half the participants said they travel to local ethnic stores in Portland or to the greater Boston area once a week for their shopping needs. They are willing to drive over one hundred miles to do their grocery shopping for the week or more.

The multicultural focus group participants who shop in towns, such as Dorchester, Massachusetts, said that they were looking for seafood products such as whole fish because they are not readily available in major grocery stores. Nearly 80% of the participants said they prefer to purchase whole fish because their recipes call for using all of the fish. They also shop for shellfish not readily available in Maine, such as periwinkle, whelk, razor clams, and Jonah crabs. All the participants said that they would purchase whole fish and other shellfish in Maine because it would be more convenient than driving to Massachusetts and they still do most of their staple food shopping in Maine grocery stores.

Vietnamese have traditionally eaten freshwater fish, but those who have lived in Maine for decades have begun to accept and favor Maine seafood. A number of survey participants said they cook with ocean caught fish rather than cook with frozen freshwater fish imported from Asia because of quality of the fish. Participants largely considered Maine seafood to be a celebratory food, especially since the Maine seafood industry does not cater to the everyday needs of the Vietnamese or Asian populations. Most grocery stores carry filets and common mussels or clams. These items, as well as lobster, are seen as extravagant ingredients, rather than part of a regular diet.

An interesting response from the focus group is that most people in Maine prefer soft shell lobster because it is easier to open, but all Vietnamese focus group participants prefer hard shell lobster because they believe the lobster is about to molt and therefore will have more meat.

All the focus group participants and survey participants said that they did not know about Maine seafood because they felt that no one was marketing to them. They also did not know about the variety of seafood in Maine or its reputation as one of the best seafood in the world. They shared an understanding about Maine's reputation for lobster because this is ubiquitously marketed, but they were unsure about Maine's ground fish or shellfish reputation, which is considered by some to be among the best in the world—Many of our James Beard Award winning restaurants attribute the local seafood as the reason for their high-quality dishes.

Recommendations

As keepers of recipes, older first-generation heads of household prefer whole fish because this was the way that their parents and grandparents cooked. According to the older participants, also prefer bony fish such as red fish that are not sought by mainstream grocery stores. Whole fish do not have to be processed; therefore, it is easier to get to market. Maine needs a biodiversity of sea catches because of regulations and quotas on high-net-worth fish such as haddock and cod.

Younger generations have an amalgamation of both the old and new American food tastes. The younger generation often shop with the older generation for seafood in ethnic stores. There, they are taught to purchase seafood in ethnic stores and not in major grocery stores. If Maine sold products that older generations would want in major stores, then younger generation consumers

may purchase both whole fish and filet. A hybrid fish market that sells filets and traditional shellfish along with whole fish and shellfish such as whelk, periwinkle and Jonah crabs could attract both generations to shop at mainstream fish markets. The younger generation is more likely to shop in major grocery stores and if they are taught to purchase seafood in major grocery stores then they could be the future consumers for traditional Maine seafood products. Additionally, catering to Vietnamese customers during hard shell season can lift sales when lobster season is at its low. Lastly, it is critical for seafood and restaurants to market to these populations since seafood is their number one choice for dining. Marketing to younger generations can also promote 53,000 Vietnamese in Massachusetts to visit Maine, dine at our restaurants and purchase our world class groundfish, shellfish and lobsters.

Maine Cambodian American Community

The Cambodian American Community is one of the largest Asian refugee populations in Maine. Cambodian Americans were resettled through Catholic Charities' Refugee Immigrant Services in the 1980s and early 1990s, after the atrocities committed by the Khmer Rouge. Like other refugee populations, family reunification and secondary migration to Maine increased the local Cambodian population. The largest Cambodian population in the US is Long Beach, California, and Maine is host to families seeking a quieter lifestyle.

Today the Cambodian population in Maine numbers 2,729¹¹ according to the 2019 Migration Policy Institute. Initially, many individuals and families lived in Portland in its many public housing neighborhoods. Currently, the Portland Cambodian population numbers about seven hundred out of the total 2729 people in Maine. As Cambodians integrated into our community, they quickly improved their economic status, moved out of the urban city, and many now reside in surrounding towns including South Portland, Westbrook, Scarborough, Biddeford, Saco, Sanford, and Portland.

The Importance of the Maine Cambodian Population to Maine's Seafood Sector

The Cambodian population is one of the largest consumers of seafood in the world. The average Maine resident consumes about sixteen pounds of seafood whereas the average Cambodian consumes about ninety-three pounds of seafood.¹² Additionally, Cambodians, like Vietnamese families and other immigrant and refugee populations, have larger families and the current Cambodian communities are more affluent than first generation refugees.

Focus Group Results: Cambodian American Participants

Almost 100% of the focus group participants stated that they were able to find basic staple produce, and protein needs in the large supermarkets such as Hannaford, Sam's Club, BJ's, and Market Basket. All the participants, however, said they shop the local Asian grocery stores for ethnic produce, spices, and protein, including frozen seafood. About half the participants said they traveled to Lowell, Massachusetts, home to almost 30,000 Cambodians. There are over 20 Cambodian-owned grocery stores and two seafood shops. Cambodians in Maine are shopping for seafood protein that is not always readily available in Maine.

¹¹ <https://www.migrationpolicy.org/data/state-profiles/state/demographics/ME>

¹² <https://www.intrafish.com/markets/us-seafood-per-capita-consumption-sets-record-but-thats-not-the-full-story/2-1-1013749>

Participants who shop in Lowell, Massachusetts said that they were looking for seafood products such as whole fish and salmon fish heads because they make great soup stock and base. They also shop for fish cheek meat, considered a delicacy among Cambodian participants, as well as Maine lobster which they typically purchase in Lowell. Although many bought lobsters in Maine, they also bought lobsters in Lowell because of the convenience of shopping for seafood in one location. They also shop for shellfish not readily available in Maine such as periwinkle, razor clams and Jonah crabs. They also purchase green crabs, generally considered by Maine environmentalists as an invasive species, for fermenting and making their own fish sauce. According to participants, their seafood purchases are generally lower-priced seafood products that they can purchase in bulk, such as fresh water white fish, tilapia, or farm raised shrimp. Most of the seafood they purchased are from fish farms and frozen seafood from China and Southeast Asia.

Cambodians have traditionally eaten freshwater fish, but those who have lived in Maine for decades have begun to make connections to local fish markets, fishermen they may know to purchase fresh fish. According to the participants, members of the local Cambodian community are price conscious, and soups are considered an economical and flavorful meal. One participant reported that, through her connections with local fishermen, she would purchase hundreds of pounds of fish from the dock and distribute them to the community. She shared that whole fish is critical to making soups, a staple food of the Cambodian diet. The importance of whole fish was confirmed in the additional survey at the Cambodian New Year.

Event Survey Results: Cambodian American Participants

The Cambodian New Year Celebration was held in April of 2022 at the Buddhist Temple in rural Buxton, Maine. Over three hundred people attended the community event which included a parade with the Governor of Maine, food, a covid flu shot clinic, and food given away from Barber Foods and our green crabs. We surveyed thirty participants all with an interpreter or a recorder. Nearly 75% of those surveyed said that whole fish was their primary choice for seafood purchase, and 70% said seafood was their number one choice when dining out.



“I eat seafood whenever I eat at a restaurant. I look for restaurants that sell seafood.”

Case Example: Connection and Opportunity

During the Cambodian multicultural focus groups, we learned that elderly female Cambodian participants typically eat green crabs (despite its status as an invasive species that puts our marine ecosystem, including our oyster, lobster, and clams, in peril). Participants reported that while they eat soft green crabs, by frying them in oil and putting them in salads or other dishes, they use the hard-shell green crabs for making a salted crab sauce:

1. Place hard shell green crabs in a jar,
2. Add copious amounts of salt and let it ferment for 7 days.

The resulting green crab sauce may be used as a condiment and flavoring in numerous Cambodian recipes.

Currently, Maine green crabs are harvested for their soft shells because it is used for consumption and bait while hard-shell green crabs are composted for a fee. According to the focus groups, Cambodians prefer to eat hard shell crabs, and with these new potential customers, harvesters could benefit from the additional revenue.

The Cambodian New Year Celebration provided an opportunity to witness the demand for the green crab. Working with Greencrabs.org an organization that raises awareness on this invasive species, Mary Parks, a leader in the organization, called over thirty harvesters in Maine to harvest green crabs for the Maine State Chamber of Commerce giveaway. All the harvesters declined, citing that it was too early in the season to catch green crabs soft or hard and that it was not economically viable to harvest green crabs since it was normally caught for bait or compost. For these reasons, the harvesters did not want to put crab traps this early in the season.

One company, Southern Maine Sustainable Shellfish, agreed to harvest and provide the 1,250 pounds requested. The Maine State Chamber of Commerce, Greencrabs.org, and Southern Maine Sustainable Shellfish partnered to give away 5-pound bags of hard-shell green crabs to the Cambodian community. The group donated 250 pounds to the Cambodian Buddhist Temple and distributed 1,000 pounds of hard-shell green crabs in less than 3 hours. Interestingly, our survey tent was two stalls away from that of a local company which was giving away 5-pound bags of chicken. The Cambodian participants accepted all 1,250 pounds of green crabs in less than 3 hours, and in that same time, the nearby stall gave away about half their chicken (150 pounds).

Southern Maine Sustainable Shellfish were approached by several elderly women who want to purchase 100-pound tubs of green crabs in the future. We encouraged the company to sell their products, such as lobsters, clams, and oysters, through the leaders and elders of the Buddhist Temple and the Cambodian Association of Maine. We also encouraged the company to find connections in Lowell, Massachusetts so that they could sell seafood to the 30,000 Cambodians who live and visit the many ethnic grocery stores there. I highlighted that selling seafood to the Cambodian community in Lowell, Massachusetts is critical to growing their customer base because based on the relative rates of seafood consumption, selling seafood to 30,000 Cambodians is the equivalent to selling seafood to 200,000 Mainers.

Recommendations

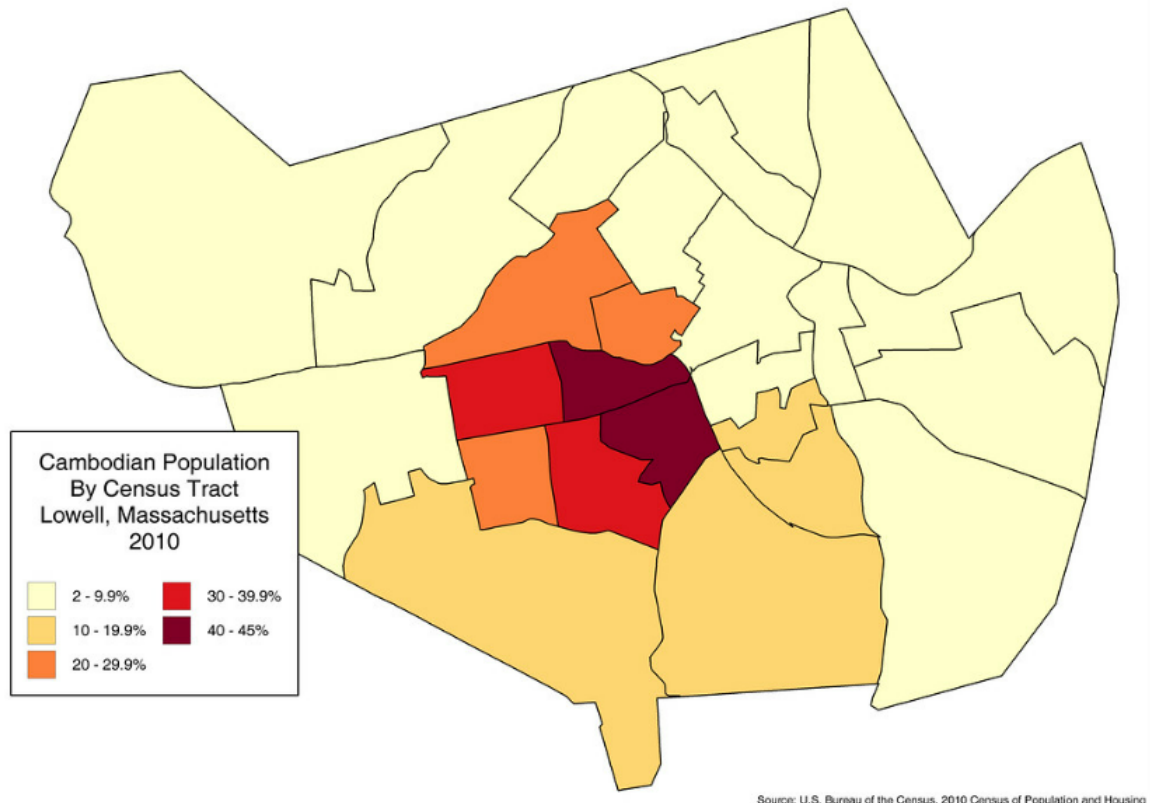
Not only is the Cambodian population the perfect fit for the next generation of Maine seafood consumers, so are the other Asian populations. If we look at this population from a 10,000-foot view, there are 16,798^[1] Asians reported in the 2019 US Census and Cambodians made up approximately 2729 or 16.2% of the total Asian population. The Selig Institute reported that Maine Asian buying power in 2019 was \$717 million, and in 2024, the buying power will increase to \$956 million or a 33% increase in buying power in 5 years. The Cambodian buying power alone was approximately \$116 million in 2019 and projected to be \$154.8 million in 2024. This is a 6% annual increase in spending power from 2019 to 2024.

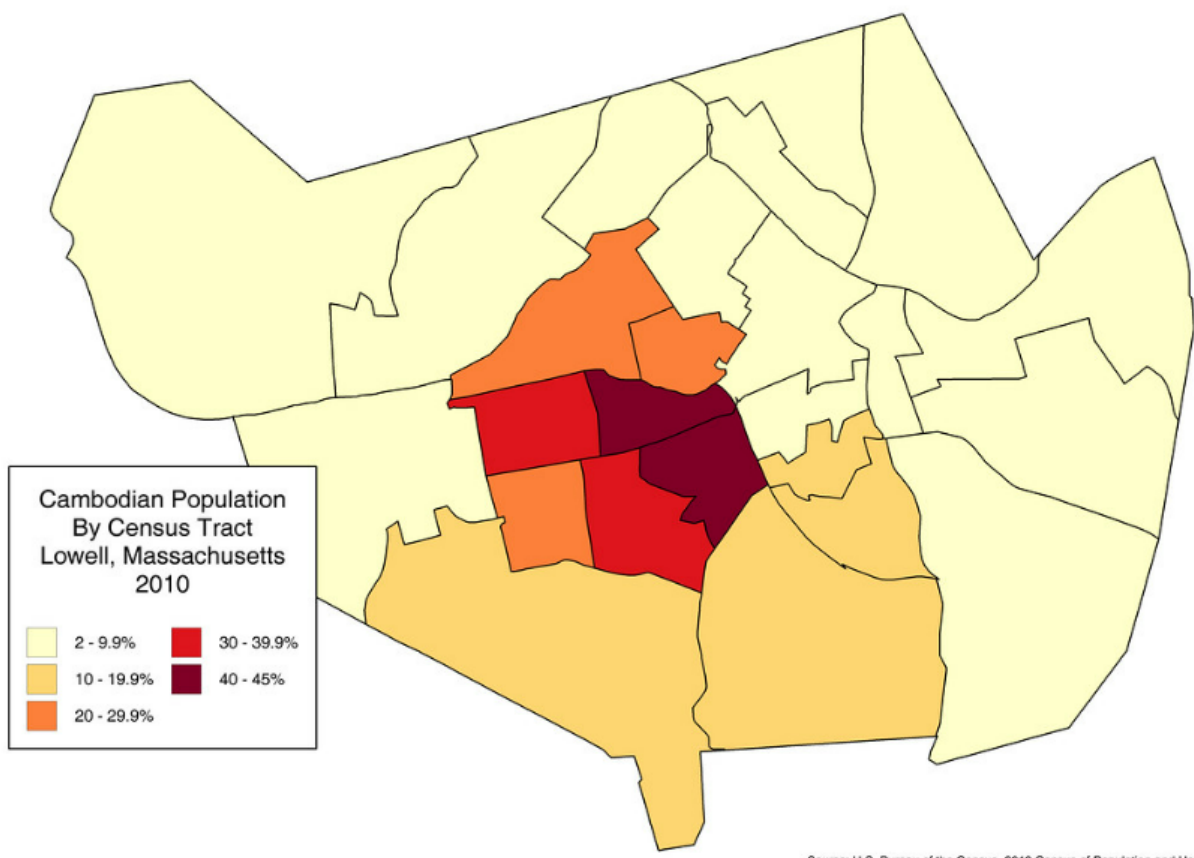
Immigrants and refugees, and in particular, the Cambodian communities, are significant to Maine's seafood because on average immigrants and refugees and people of color spend more per capita on food, have more capital to spend and have more mouths to feed. Many prefer seafood as a primary source of protein. Between 2017 and 2018, Asian household incomes were \$75,103 and spent \$9,729^[2] on food at home and away. The average US household income was \$60,815 and they spent \$7,869 on food at home and away. On average Cambodians and Asians spend 23.6% more on food at home and away than the average US resident. They also reported in both the surveys and focus groups that their number dining option at restaurants is seafood.

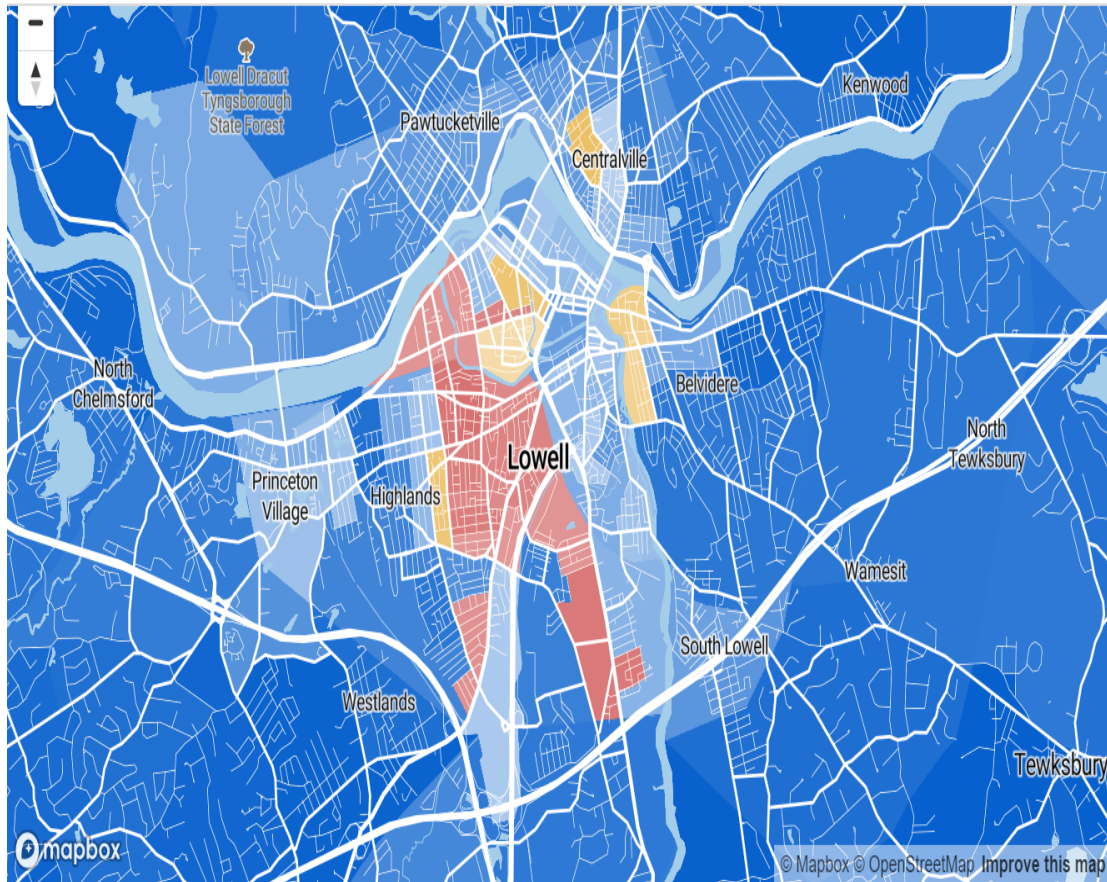
According to a Seafood Source 2019 article, "The 2019 FMI survey discovered that 56% of US consumers eat seafood twice a month.^[3]" On average, this means the average Cambodian community in Maine and beyond consumes seafood ten times a month. This means Maine hospitality and restaurants should be marketing to the Asian community because they are frequent buyers, and their larger families make a bigger seafood purchase than most families and their kids are the future seafood consumers Maine Seafood industry so desperately needs.

The Cambodian community could also be an important community in helping to reduce invasive green crab species in Maine. Could Maine become an exporter of green crab sauce to other Cambodian markets across the country including Lowell, Massachusetts or Long Beach California or the San Francisco Bay area? The Cambodian community in Maine, like many other ethnic communities, knows and supports one another. They can help promote Maine's green crabs to other parts of the country as well as our world class seafood. The Cambodian community could also purchase whole fish at fish auctions and support local fishermen with smaller catches, creating an incentive to fish for more biodiversity and helping our Gulf of Maine harvesting to become more sustainable.

University of Massachusetts, Boston Census data found the average household income for Cambodians in Massachusetts was \$75,932¹³ between 2015 and 2017. Using Selig Institute's numbers, because the average household income is approximately the same, the food market at home and away is \$93 million for Cambodians in the greater Lowell, Massachusetts area. If we add the Maine Cambodian Community, the total is \$101 million.







Majority Race Key



A Final Word

We need to do a better job educating and marketing to Asian consumers, as they are large consumers of seafood. They could, in turn, influence communities throughout Massachusetts and beyond to visit Maine, dine at our seafood restaurants, shop at our seafood and fishmonger stores and buy Maine seafood. Our Vietnamese and Cambodian communities go to Massachusetts regularly and could be our ambassadors to almost 83,000 Cambodians and Vietnamese because these communities are connected through social media, cultural connections, families, and young people moving to Massachusetts for more opportunities. Selling to 83,000 Cambodians and Vietnamese that eat 92 to 83 pounds per person is like selling to 450,000 US consumers who average sixteen pounds of seafood a year.

The data and community voice are clear, Maine seafood is not marketing to ethnic communities, and we are missing the population most recommended by a national study. The Maine Seafood Industry needs to educate Asian communities about our amazing seafood. The Maine seafood industry needs to be better educated about Asian seafood needs, reach out, and build relationships with this growing and important seafood community. The industry needs to market to ethnic groups at all levels of commerce—from the local supermarket that could sell whole fish,

fish heads, fish cheeks, periwinkle, green crabs, and more to restaurant dining and prepared foods.

Lastly, when we take the time to make connections, learning and new relationships form. Without out new customers, Maine seafood cannot survive.

[1]

https://www.umb.edu/iaas/census/acs/data_for_chinese_indian_vietnamese_cambodian_korean_americans_in_ma_2015-19