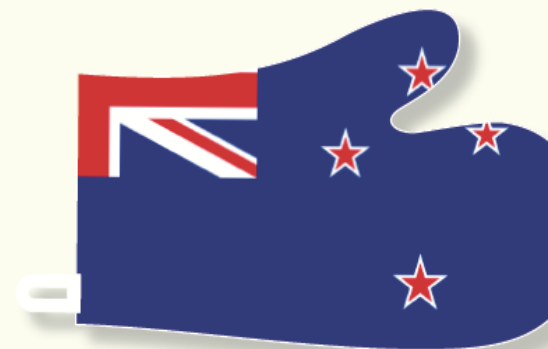


PERIscope2013



New Zealand

Consumers & Their Food





Introduction

2

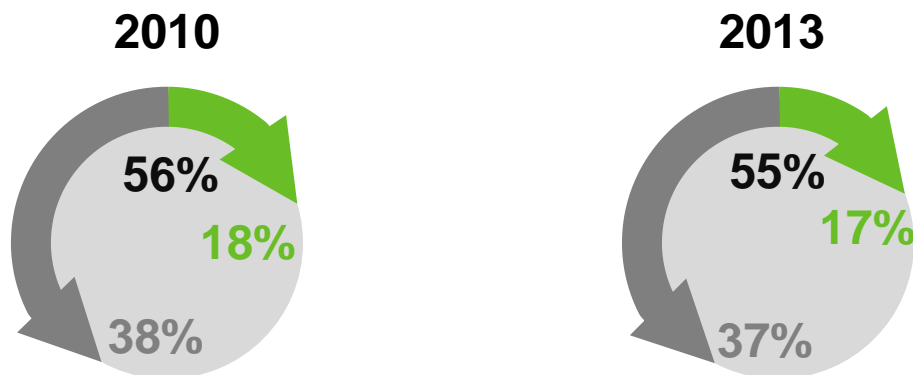
- PERIscope 2013 explores consumer behaviours & attitudes towards food, shopping and cooking.
- Online survey conducted amongst 1,000 adults aged 18+ in New Zealand.
- Results are also available across nine other countries.
- Survey covers topics such as: Eating at home, attitudes towards cooking, local food, sustainability, the environment, grocery shopping and health & wellbeing.
- Research carried out by Ipsos MRBI.
 - *Please note, there may be discrepancies in relation to some of the 'total' figures within this report. This is due to rounding (e.g. "slightly agree" at 45, "strongly agree" at 30, "agree" at 76).*
- For further information or queries please visit www.bordbia.ie or email info@bordbia.ie



Just over half of all adults in New Zealand continue to have a positive relationship towards cooking.

3

 **Good Fun**  **A Passion**

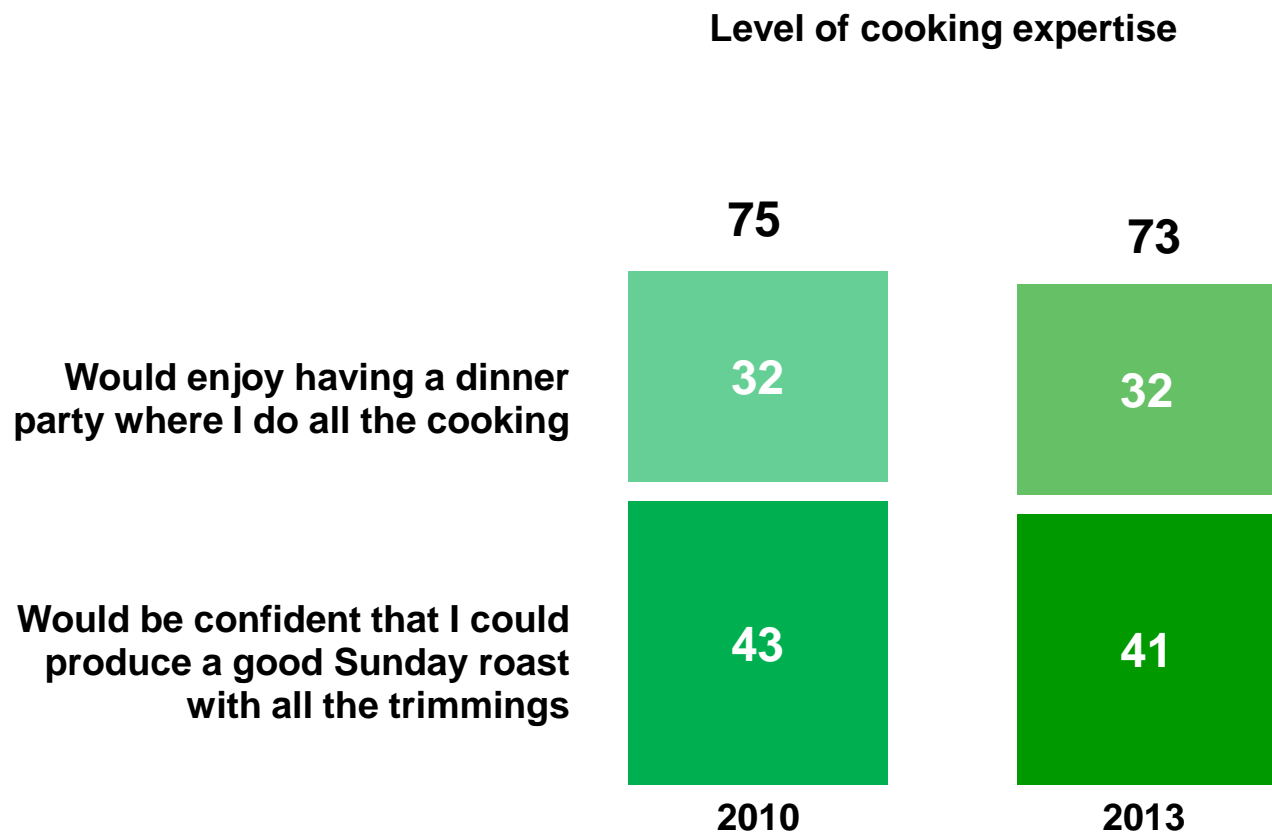


New Zealand ranks joint third in terms of considering cooking to be a passion. Overall New Zealand is one of the top three most positive countries when it comes to cooking.



Levels of culinary expertise in NZ have remained relatively stable in the past three years. Almost one third would be confident to be a dinner party host that does all the cooking.

4



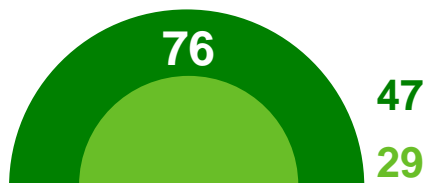
New Zealand considers itself to have the second highest level of cooking expertise (on the basis of dinner party hosting and producing meals with all the trimmings) of all countries surveyed.

A substantial eight in ten adults in NZ prepare their meals from scratch a few times a day/few times a week, a slightly improved figure from 2010.

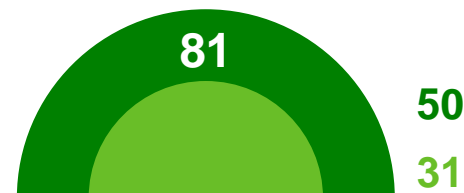
5

 *% preparing a meal from scratch once/ few times a day*  *% preparing a meal from scratch few times a week*

2010



2013

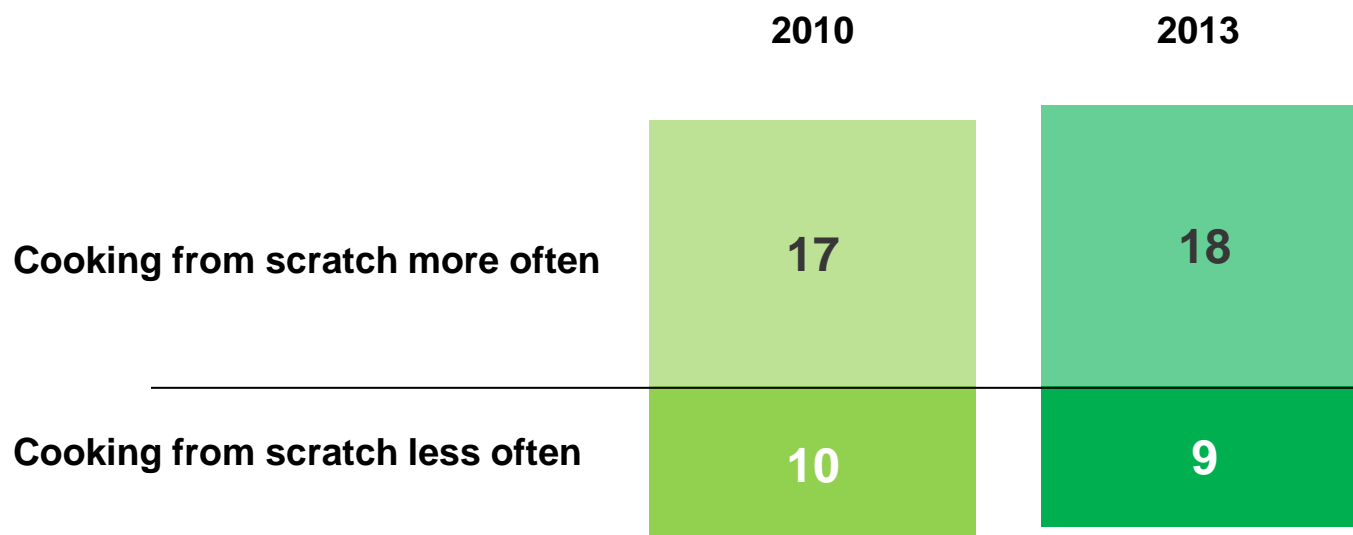


Compared to other countries in the PERIscope 2013 study New Zealand ranks first for daily/weekly scratch cooking.

Just under two in ten claim to be cooking from scratch more often than 12 months ago, a similar proportion to three years ago.

6

Frequency of cooking meals from scratch more often or less often compared to 12 months ago



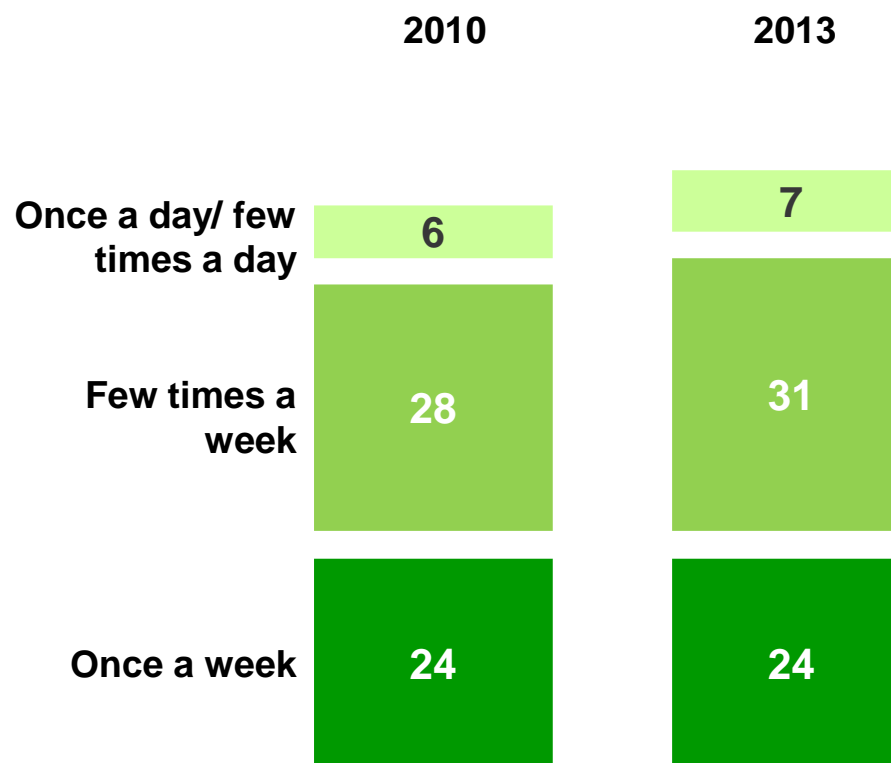
Compared to other countries in the PERIscope 2013 study, New Zealand's claims regarding cooking from scratch more often are similar to the majority of other countries.



Since 2010, New Zealand has slightly increased its usage of ready prepared meal components on a daily/ weekly basis.

7

Use of ready prepared ingredients



In terms of daily/ weekly usage of ready prepared ingredients, New Zealand displays the second highest overall usage levels, behind that of the US and slightly ahead of GB.



The proportions of NZ adults who have taken cooking classes has risen compared to 2010. The proportion entertaining at home remains steady at one third of all adults.

8

**% who have attended/taken
cooking classes in the past
three years**

2013 **10**

2010 **6**

**% who are entertaining
at home more often
nowadays**

33

34

New Zealand ranks in the top three in terms of the percentage who have attended cookery classes. With regard to entertaining at home, New Zealand ranks in fifth place overall.



The enjoyment that adults in New Zealand achieve through cooking and creating a great meal remains high.

9

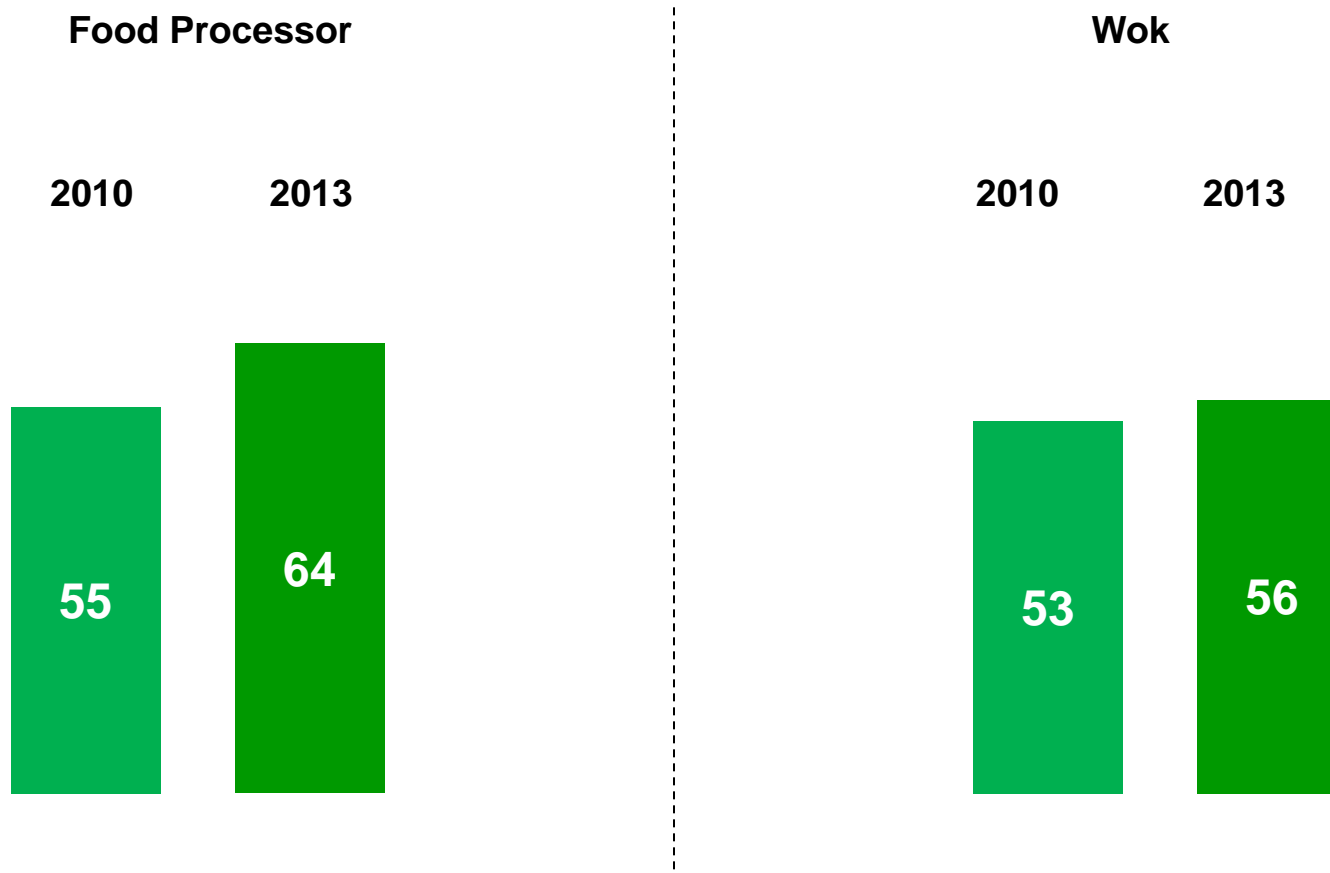
% applies that they *'enjoy cooking and being able to create a great meal'*



New Zealand realises the highest levels of enjoyment from the ability to cook and create a great meal.



Ownership levels of food processors have increased considerably in New Zealand. Woks continue to be owned by just over half of all adults in New Zealand. ¹⁰

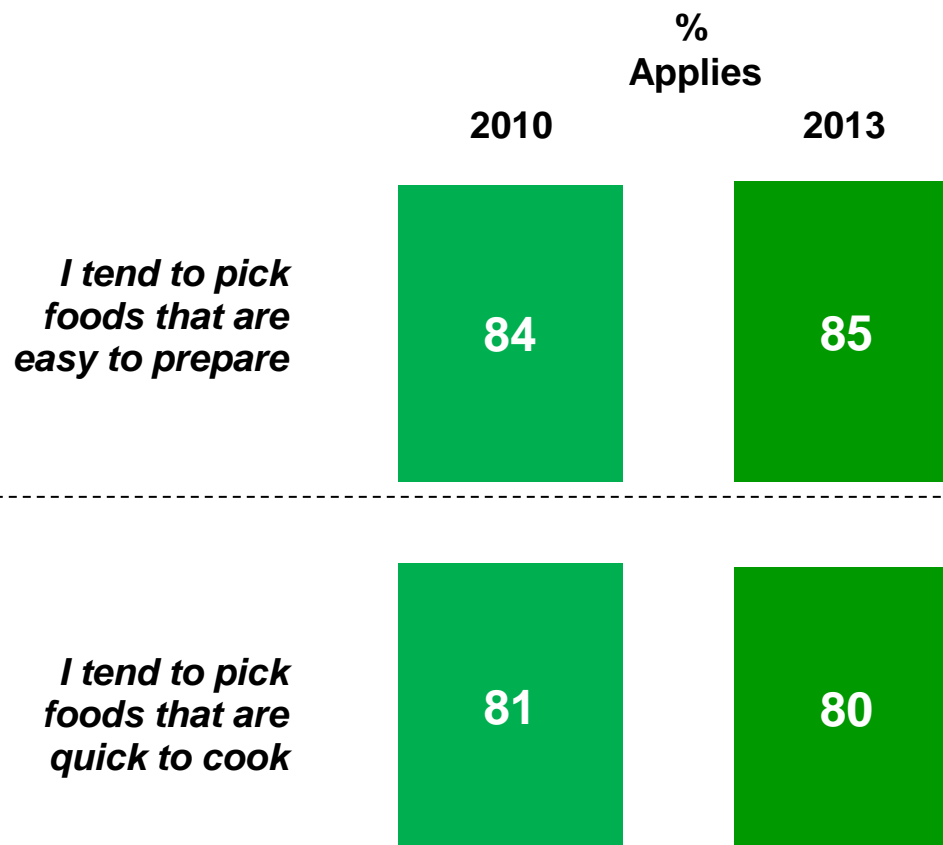


New Zealand claims the second highest ownership level of food processors, behind Sweden (65%) and the third highest ownership for woks, behind Belgium (62%) and the Netherlands (70%).



Eight in ten adults in New Zealand continue to choose food that is easy to prepare and quick to cook.

11



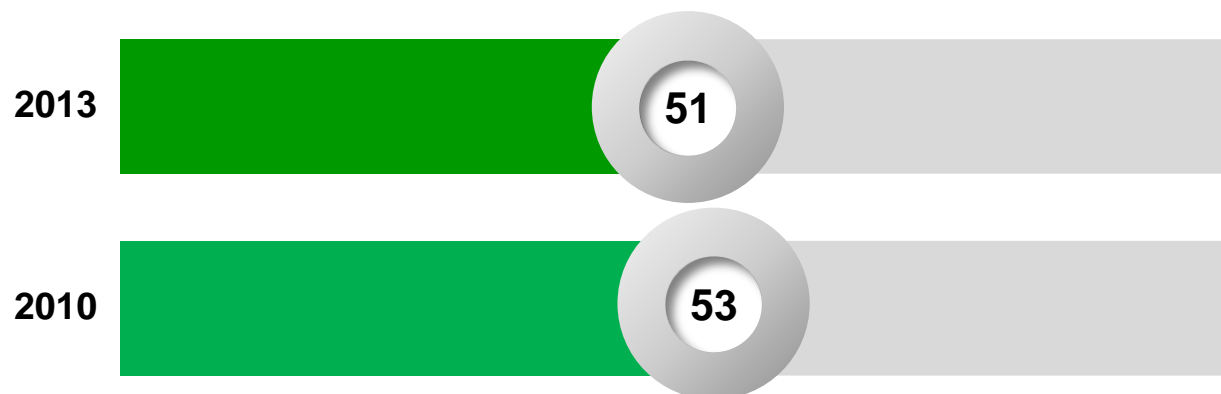
All countries want to choose foods that are not overly time consuming. New Zealand ranks in the top three for picking both foods that are quick to prepare and quick to cook.



In New Zealand, approximately half of all adults claim to use a lot of ready to eat foods in their households.

12

% applies 'we use a lot of ready to eat foods in our household'



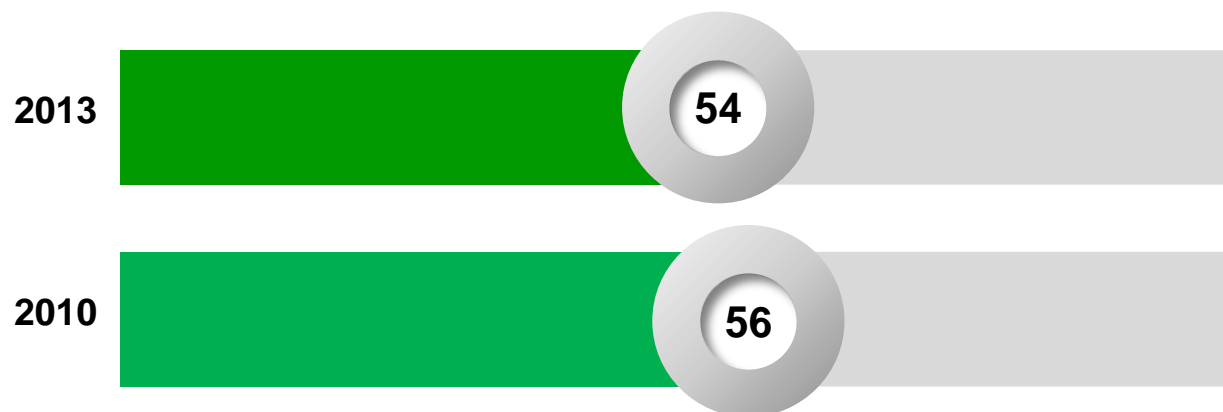
The US (68%) displays the highest usage levels of ready to eat foods. New Zealand ranks fifth but its levels of usage is considerably higher than that of Sweden (31%) and the Netherlands (34%).



In New Zealand, the proportion who claim to often eat ready prepared/convenience meals has maintained its position since 2010.

13

**% applies that they *'would often eat ready prepared/
convenience meals'***



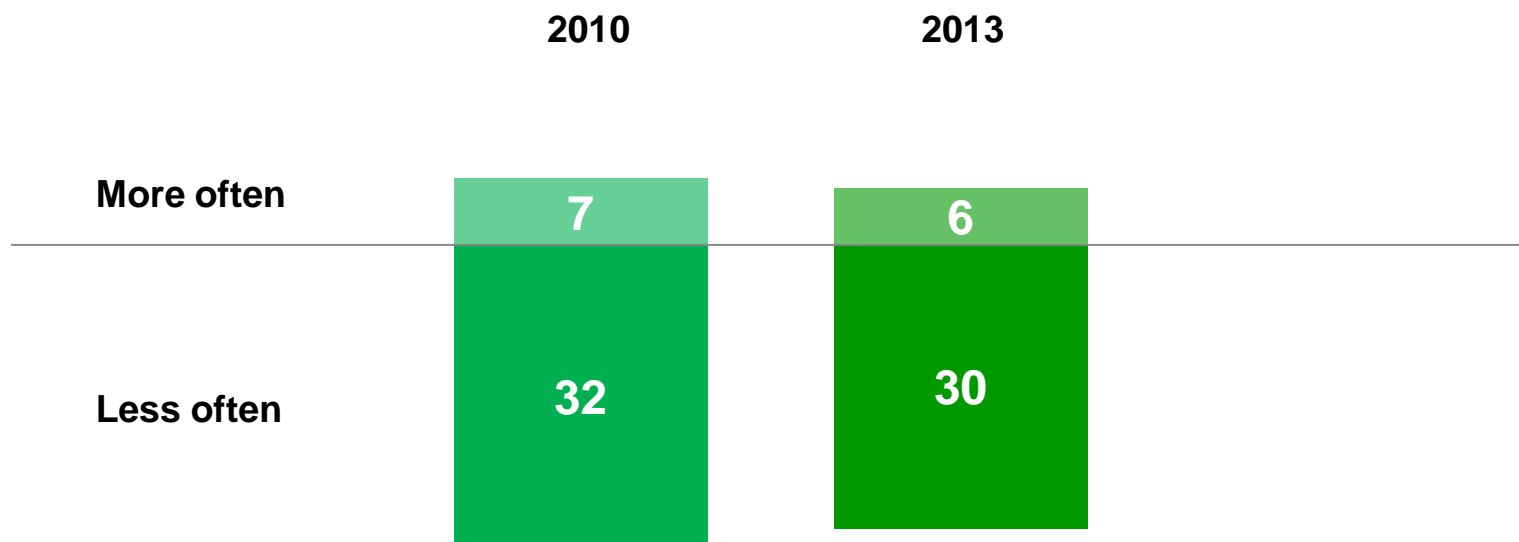
New Zealand ranks fourth, behind the US (71%), Spain (69%) and GB (56%) for the proportion claiming to often eat convenience meals.



Three in ten continue to claim that they are eating convenience meals less often than 12 months ago.

14

**% eating ready meals/ convenience meals more/less often than
12 months ago**

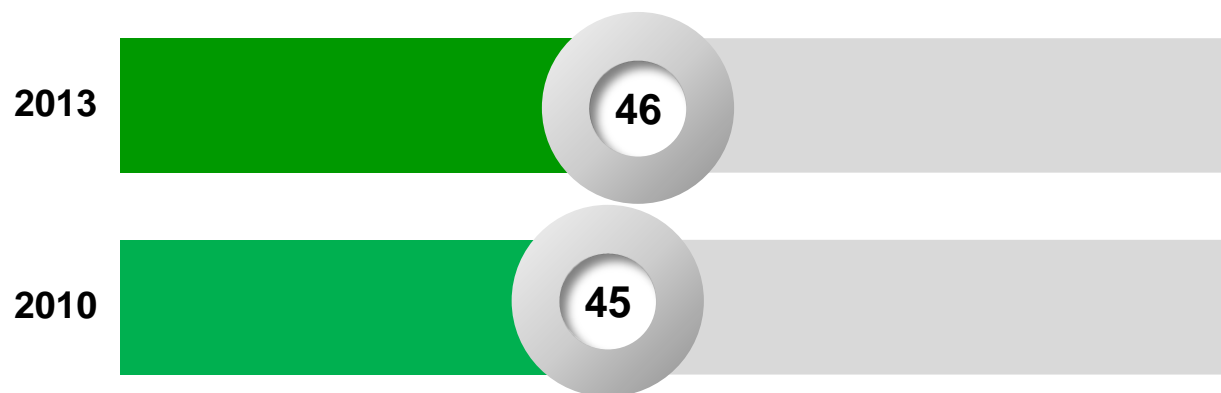


The US and Spain have the highest proportion of people who are claiming to eat ready meals/ convenience meals more often than 12 months ago. New Zealand fares similarly to most other countries.

The proportion who consider convenience meals to be a good substitute for home cooking has remained at 2010 levels.

15

% agree that convenience meals... 'are a good substitute for home cooked meals when time is limited'



In terms of agreement with the idea that convenience meals can be a good substitute for home cooked meals, New Zealand ranks amongst the lowest.

One of the biggest changes in perceptions regarding convenience meals has been the view that they are expensive products. Views regarding, quality, value and taste are stable. ¹⁶

Convenience foods.....


... are expensive

65%  **70%**
2010 2013


... are good value for money

19%  **21%**
2010 2013

... have poor quality ingredients

39%  **40%**
2010 2013

... taste great

28%  **27%**
2010 2013

New Zealand displays one of the lowest levels of agreement about convenience foods tasting great. It also is one of the highest believers that convenience foods are expensive.

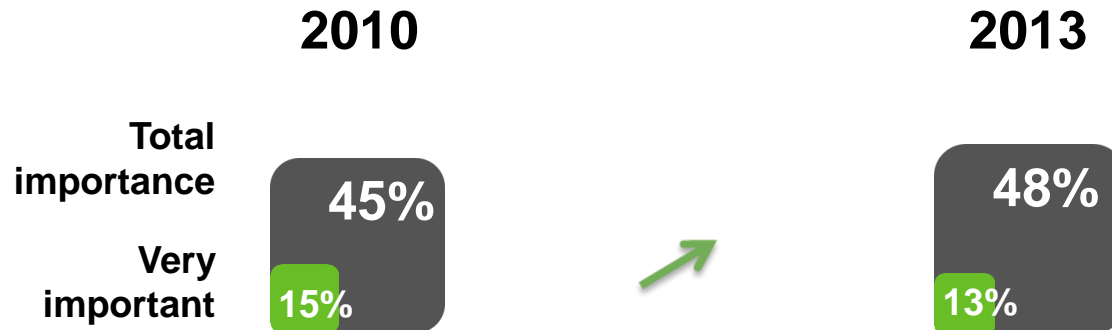
Back To Basics



The proportion who consider buying local food to be important represents the view of just under half of all adults in New Zealand.

18

Importance of buying local produce when shopping



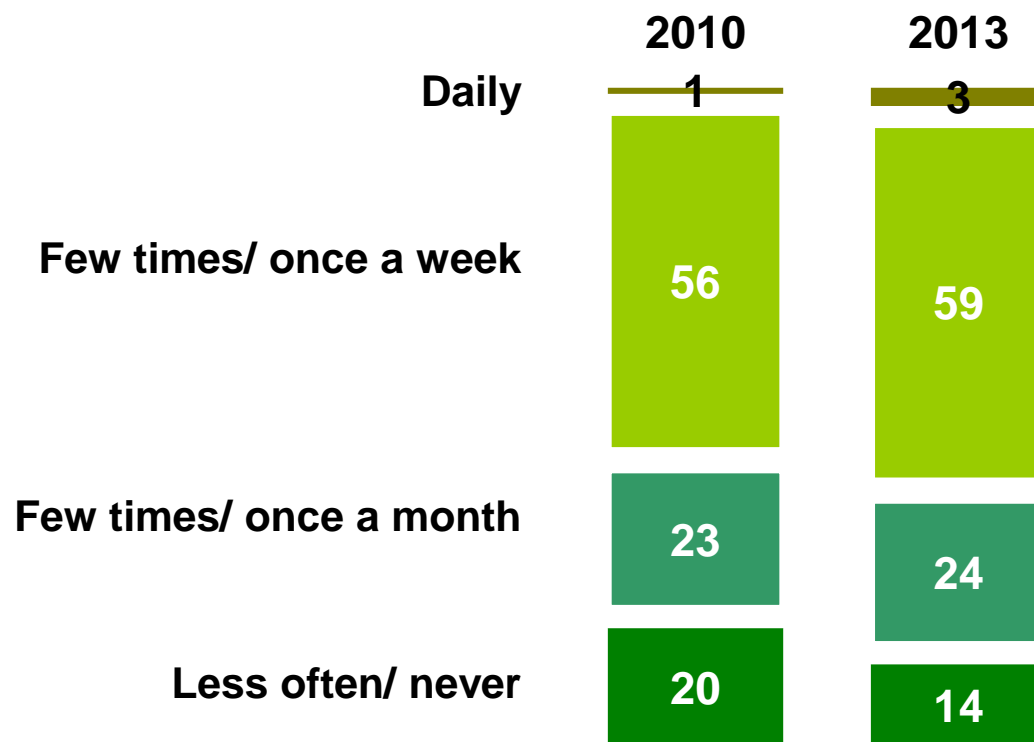
France (73%) places the most importance on buying local. New Zealand is in second last position, ahead of only the Netherlands (27%).



The frequency with which local food is bought in New Zealand has shown slight improvements over the past three years.

19

Frequency of 'Local' Food Purchases



New Zealand ranks fourth for daily/few times a week/once a week purchases, just barely ahead of Germany (63%).



New Zealanders most commonly believe that local food is either food that is made close to where they live or food that comes from farmers' markets.

20

More than 4 in 10 believe local food is food that is...

44%

... made within close proximity to where I live

41%

... available in farmers' markets

Approximately one third believe local food is food that is...

33%

.. made within a 20 mile radius from where I live

32%

... made within the county in which I live

Much less believe local food to refer to food that is ...

14%

... made within the province I live

1%

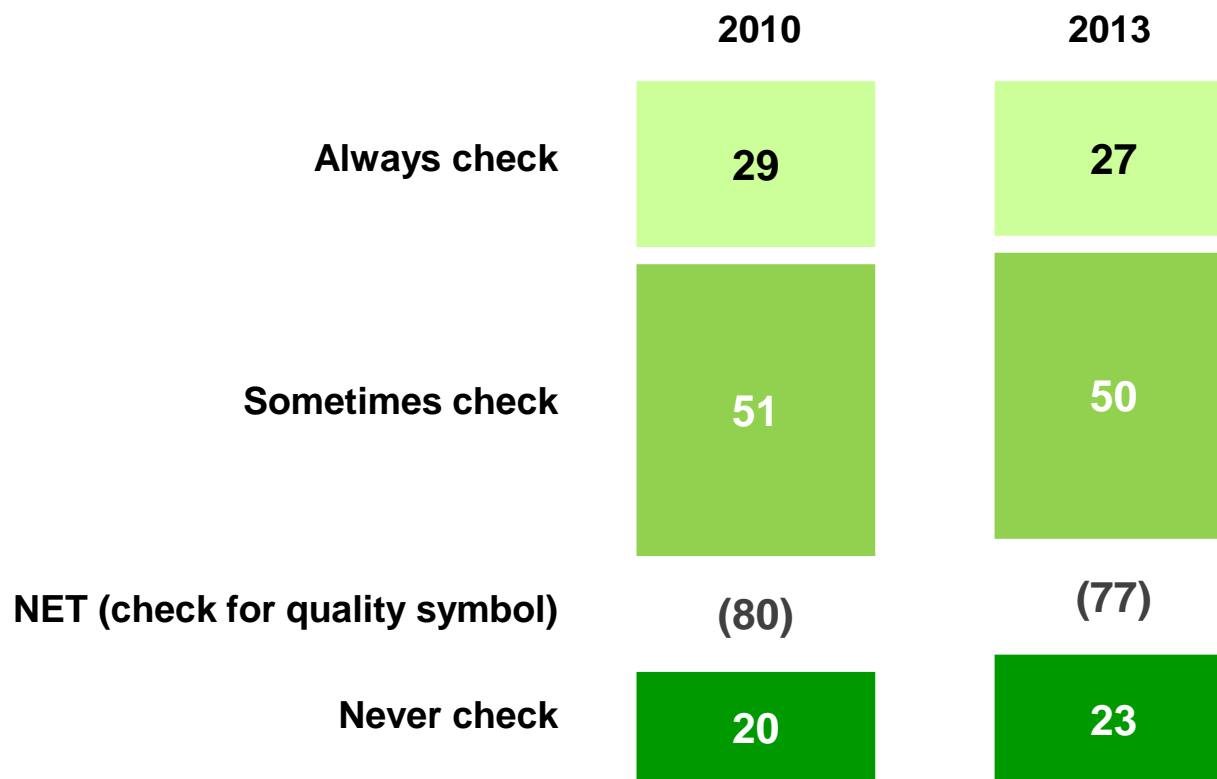
... made within Australasia



Checking for the country of origin label is a behaviour that represents just over three quarters of all New Zealand grocery shoppers.

21

Checking for Country of Origin label

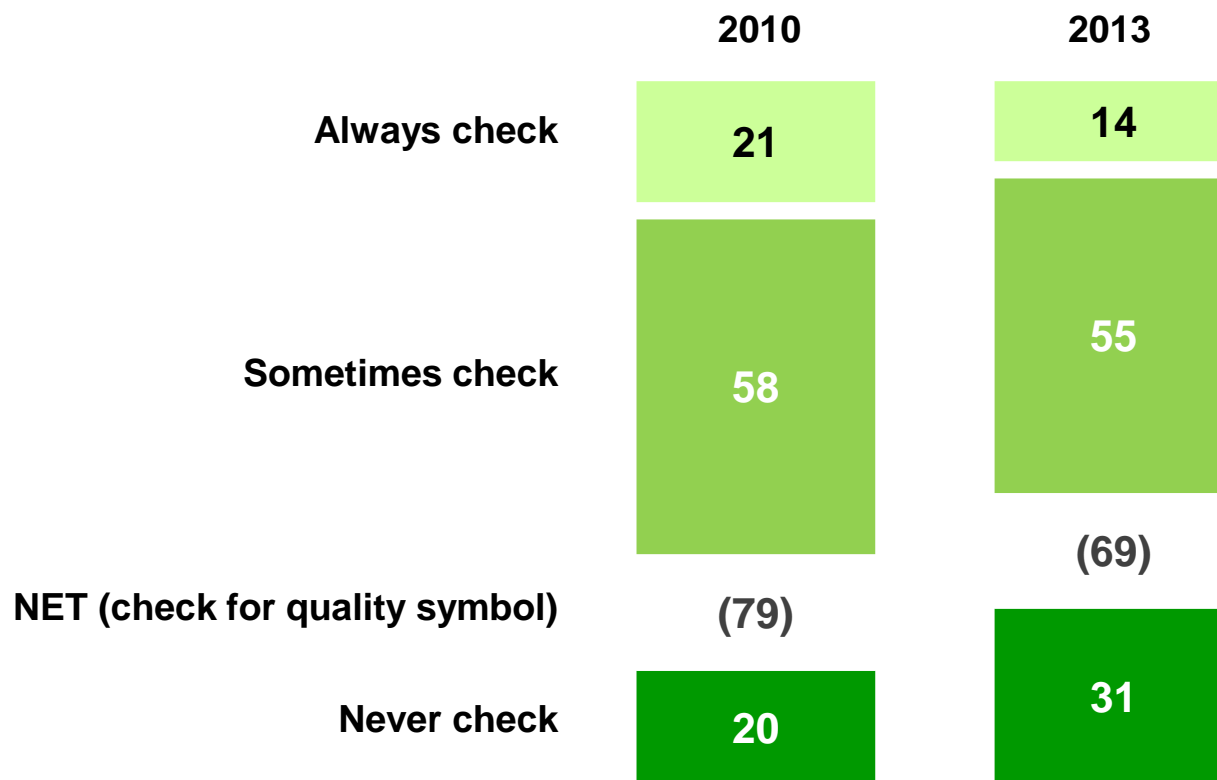


Compared to all other countries, New Zealand displays a relatively average tendency to check for country of origin information. At more than nine in ten adults, Sweden is the most likely to check this information.

The behaviour of checking for a symbol of quality has fallen substantially in New Zealand. The proportion who 'never check' now stands at just over three in ten.

22

Checking for Symbol of Quality label



New Zealand ranks joint fifth for checking the symbol of quality on food products. Sweden, Spain, ROI, Belgium and Germany are all more likely to check this information.



The proportion of people who place importance on eating dinner together remains at ninety per cent in New Zealand.

23

% applies that *'it is important to spend time over dinner as a family'*



Overall, spending time eating dinner together as a family is important in all countries. Six out of the ten countries display more than ninety per cent agreement or equal, whereas the US falls outside this majority.

Food & Sustainability



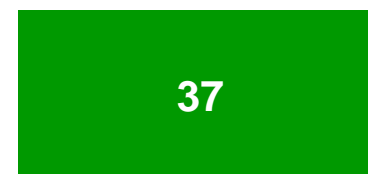
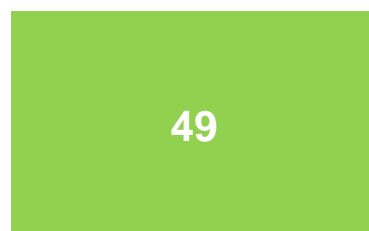
Awareness of food miles has shown a significant advancement since 2010. The percentage buying low food miles products has risen considerably also.

25

% never heard of food miles

2010

2013



% who buy foods with low food miles in 2013



15
13



24
14

2010

2013



% who buy foods with low food miles



% who sometimes try to buy food with low food miles

New Zealand is the most aware of food miles when compared to all other countries in the PERIscope 2013 study. Despite this, it ranks amongst the lowest for purchases of food with low food miles.

The proportion of adults claiming to have never heard of sustainability has remained unchanged in three years. However, purchases of low footprint foods have risen.

% never heard of sustainability

2010

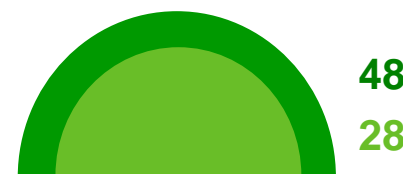
2013



% who buy foods with sustainable features in 2013



34
28



48
28

2010

2013

% who buy foods with sustainable features

% who sometimes try to buy food with sustainable features

New Zealand has relatively high levels of awareness regarding sustainability. Purchases of food with sustainable features are relatively high and similar to that of France, Belgium, Sweden and Germany.

The numbers claiming to have never heard of carbon footprint have remained relatively stable. In three years, there has been a slight growth in purchases.

% never heard of carbon footprint

2010

2013



% who buy foods with low footprint in 2013



27

22



32

20



% who buy foods with low footprint

2010



% who sometimes try to buy food with low footprint

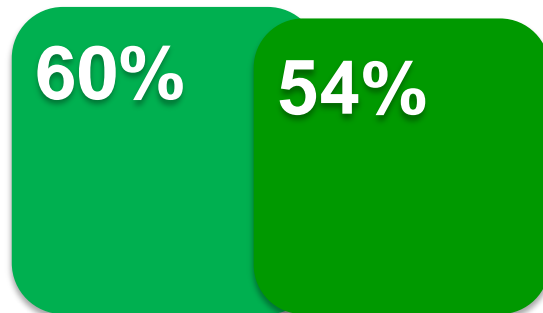
2013

New Zealand has the highest awareness of carbon footprint. Purchases do not reflect this high level of knowledge however, as New Zealand ranks amongst the lowest purchases of low footprint products.



Just over half of adults now think of the environment or a company's environmental policy when buying products. There has been a decline in both behaviours since 2010.

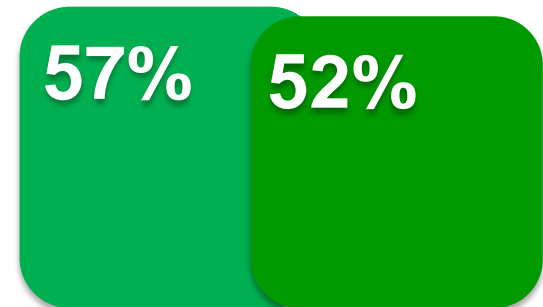
**% who agree that they are more
conscious of environmental issues in
their choice of products**



2010

2013

**% who agree that they prefer to buy
from companies that are aware of the
impact of environmental issues**



2010

2013

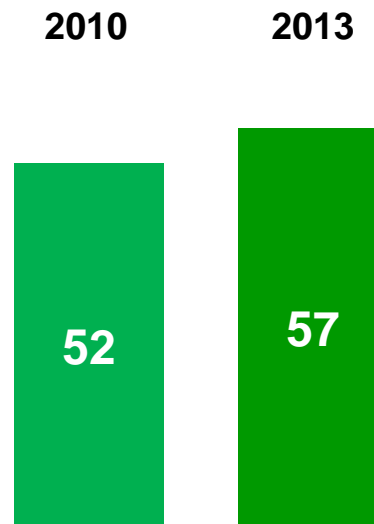
Similar to New Zealand, consumer consciousness of environmental issues is declining in most countries. Currently New Zealand displays an average tendency to think about these environmental dimensions.



Buying food in smaller packs to avoid waste is a behaviour that more than half of New Zealand grocery shoppers claim to do.

29

% applies that they *'buy food in smaller packs because it means less waste'*



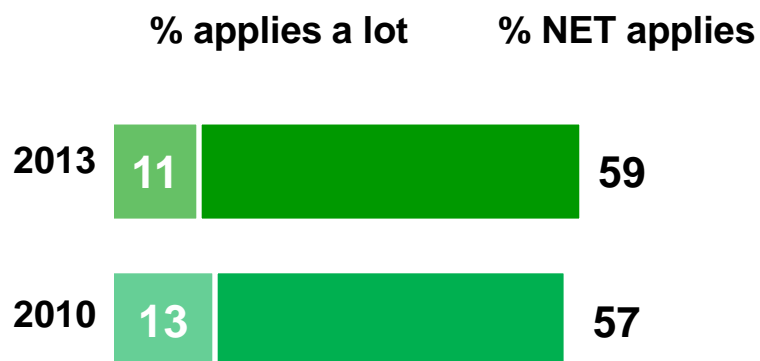
Compared to the Germans (81%), where buying in smaller packs is extremely popular, grocery shoppers in New Zealand are much less conscious about cutting down on food waste.



Attempts to buy Fair Trade products in New Zealand has remained similar to levels displayed in 2010.

30

I try to buy Fair Trade products/brands whenever they are available



New Zealand ranks sixth when it comes to efforts to buy Fair Trade products.

Shopping Around

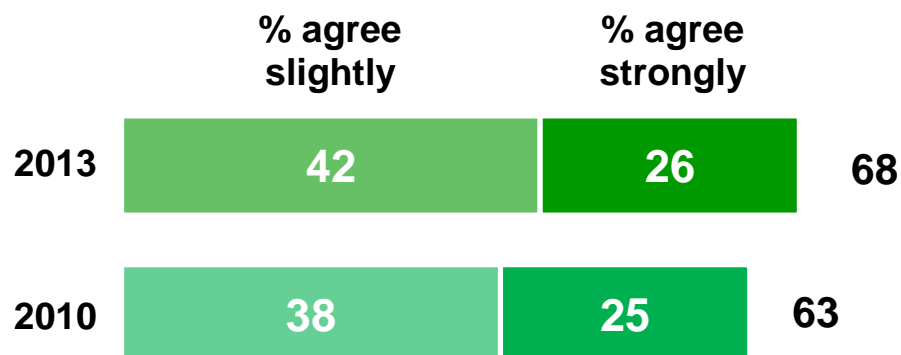




The proportion of New Zealand grocery shoppers who look for price as a 'first thing' when shopping, has risen to just under seven in ten.

32

When I shop the first thing I look for is price

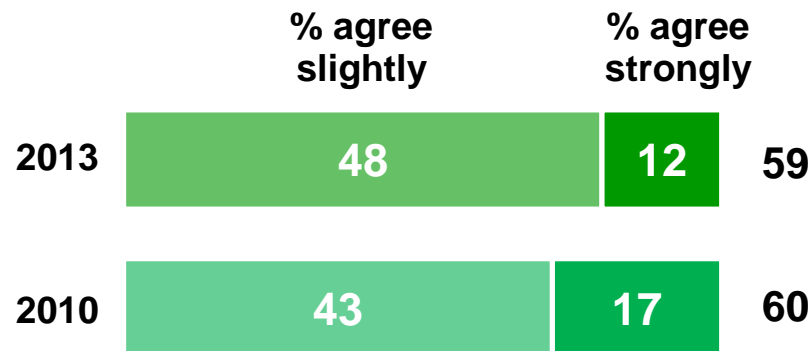


Looking for price as a 'first thing' is most popular in New Zealand.

The belief that the quality of fresh food is more important than price remains applicable to approximately six in ten New Zealand grocery shoppers.

33

Quality of fresh food is more important than price



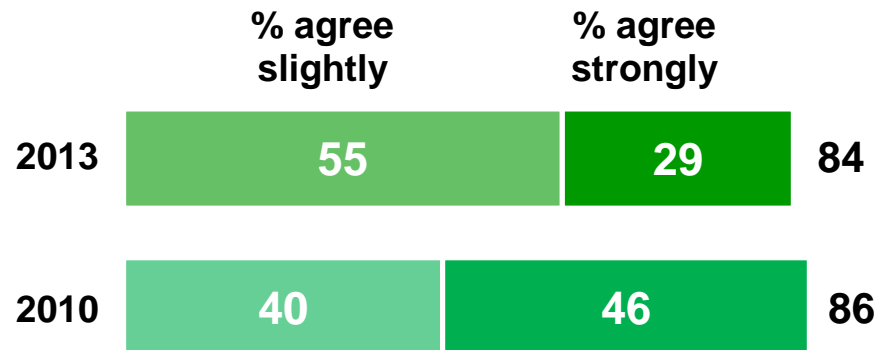
New Zealand is positioned second last for its agreement with the idea that quality is more important than price.



Since 2010, the behaviour of going to the same store to get value for money amongst New Zealand grocery shoppers has been maintained.

34

I most often go to the same store but look for the best value for money I can get



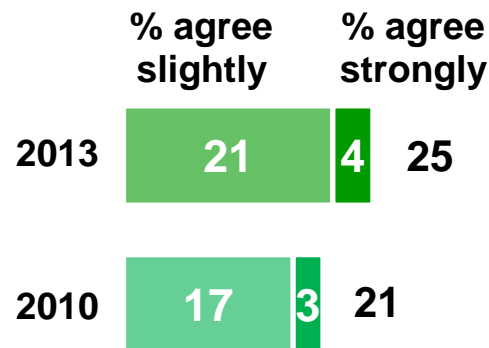
Obtaining value for money in the same store is an extremely popular shopping behaviour in New Zealand. It ranks first, followed by ROI (81%), France (79%) and Belgium (79%).



Since 2010, there has been a very small increase in the proportion who would be willing to pay a bit more for grocery shopping to get superior customer service.

35

I will pay a bit more for grocery shopping to get superior customer service



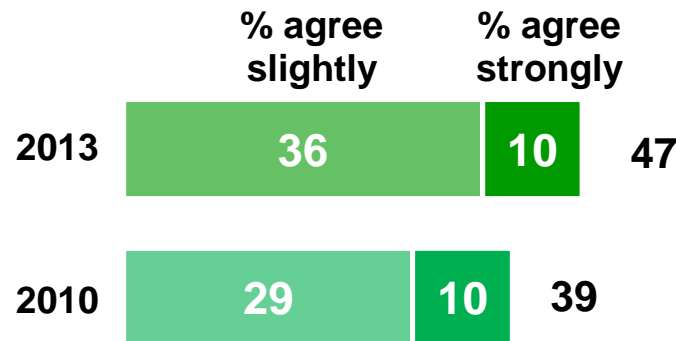
Willingness to pay a premium for superior customer service is a relatively unpopular trait amongst New Zealand grocery shoppers who rank ninth overall, just ahead of the Netherlands (18%).



Buying products on impulse is a shopping behaviour that has become increasingly popular amongst grocery shoppers in New Zealand since 2010.

36

I tend to buy on impulse if I think products are cheap



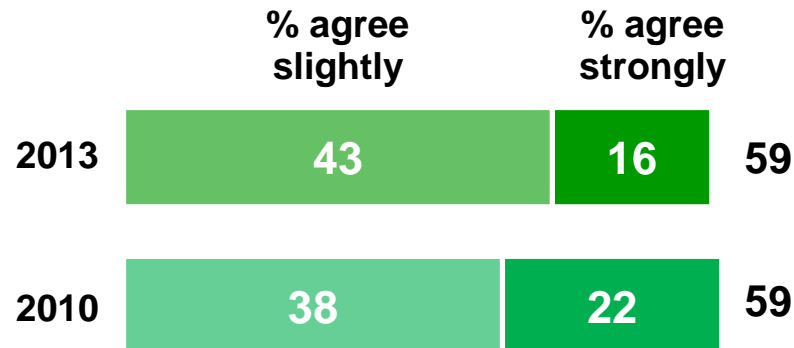
GB (54%) shoppers are most likely to buy on impulse, followed closely by New Zealand.
French (17%) grocery shoppers are least likely to buy on impulse.



Spending time looking for a bargain is a shopping behaviour that has maintained its position among just under six in ten New Zealand grocery shoppers.

37

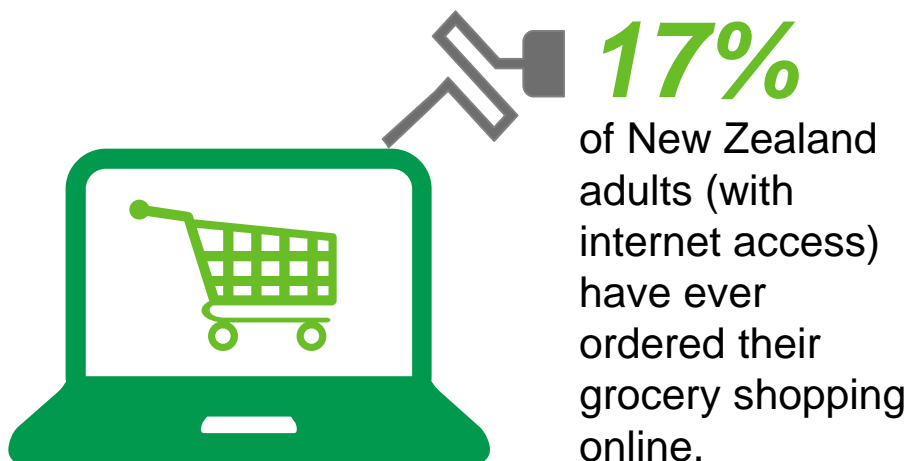
I don't mind spending time looking for a bargain



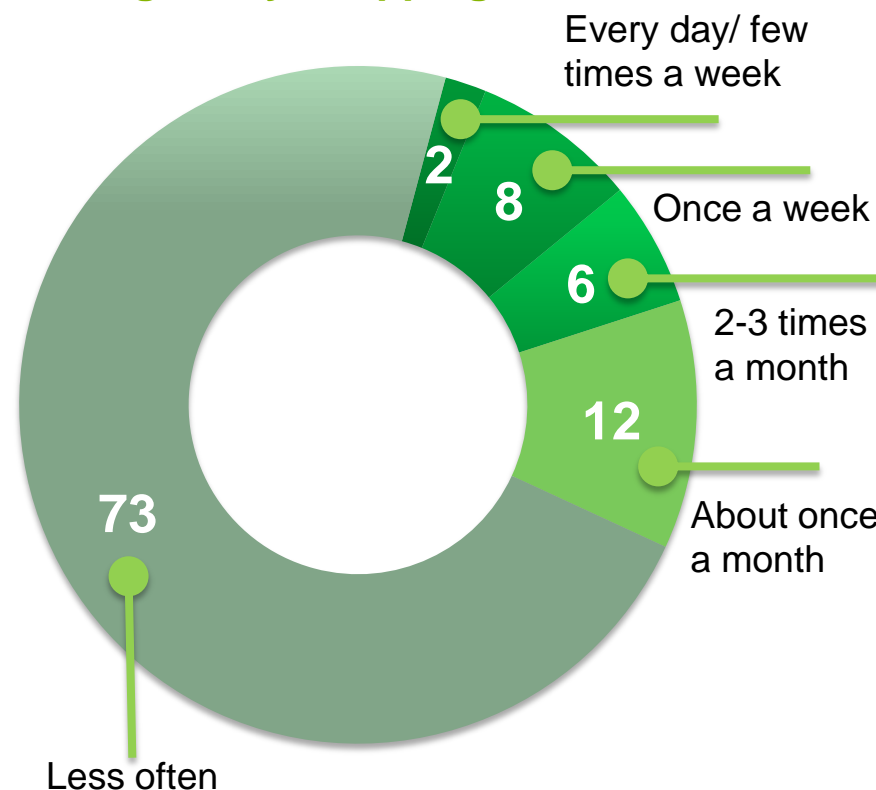
New Zealand grocery shoppers' willingness to spend time looking for a bargain is the second highest of all the countries surveyed in PERIscope 2013. The US (61%) ranks first.

In New Zealand, less than two in ten adults claim to have ordered their grocery shopping online. The majority of these are infrequent users of the online shopping facility.

38



How often have they ordered their grocery shopping online?

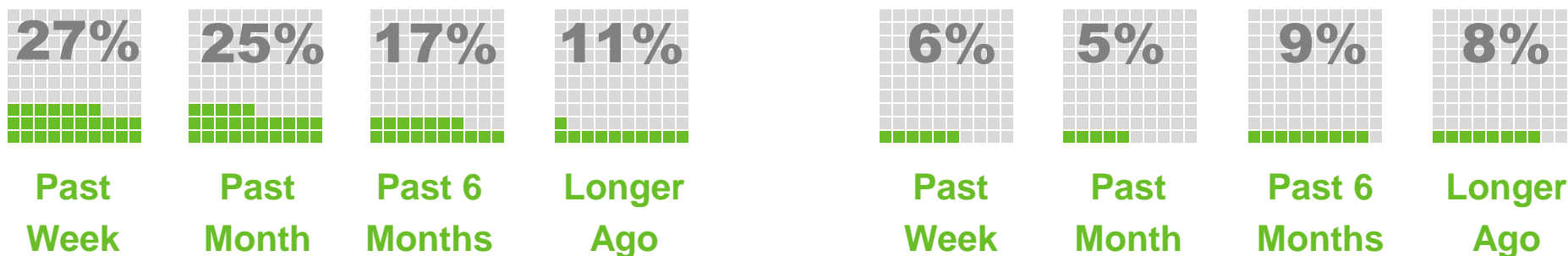


New Zealand records the fourth highest proportion of online grocery shoppers. It is considerably behind Spain (30%) and GB (28%) but ranks similarly to Germany (17%).

Downloading recipes is a particularly popular activity in New Zealand. Downloading food apps is much less popular but has been done by almost three in ten adults.



Most recent download activity



New Zealand has the highest percentage of people who have used the internet to download a recipe. Its experience of downloading a Food App is also relatively high, placing it in third position overall.

Health & Wellbeing

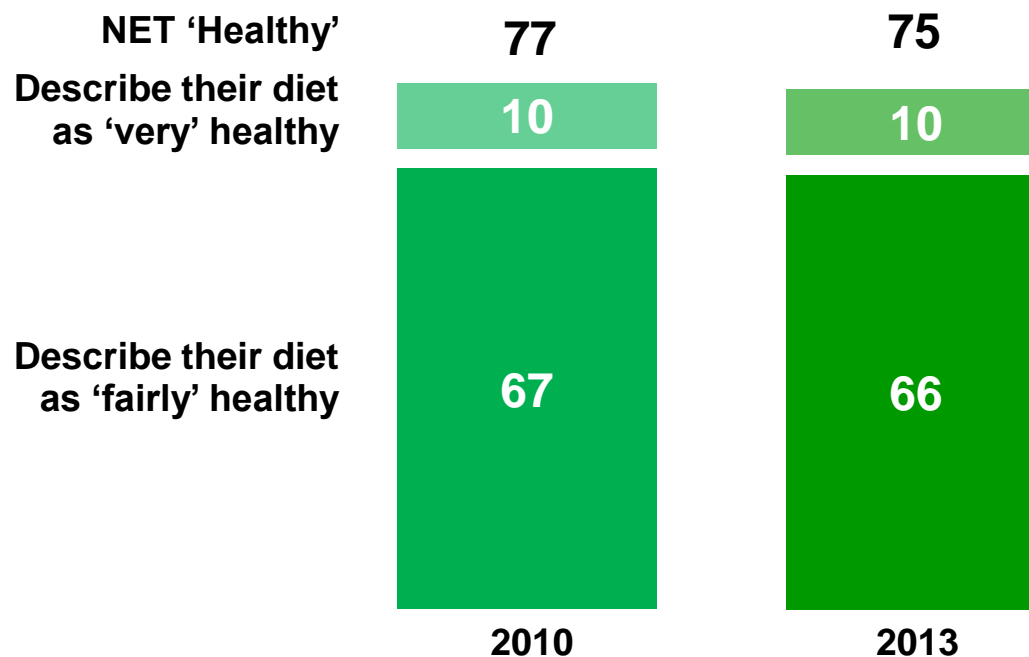




Three quarters of adults in New Zealand consider their diet to be healthy. One in ten consider it to be 'very healthy'.

41

Diet Perceptions



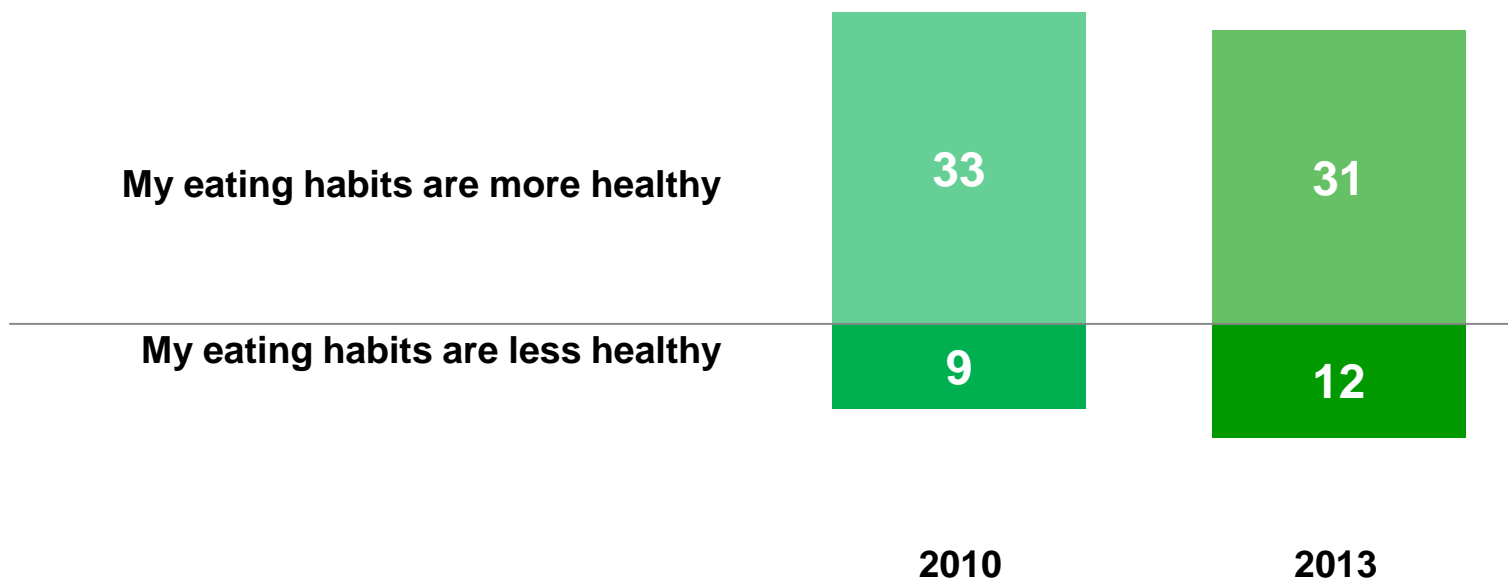
Perceptions of health in New Zealand are relatively average compared to all other countries in the PERIscope 2013 study.



Three in ten New Zealand adults believe their eating habits to be more healthy in the last 12 months.

42

Changes in eating habits in last 12 months



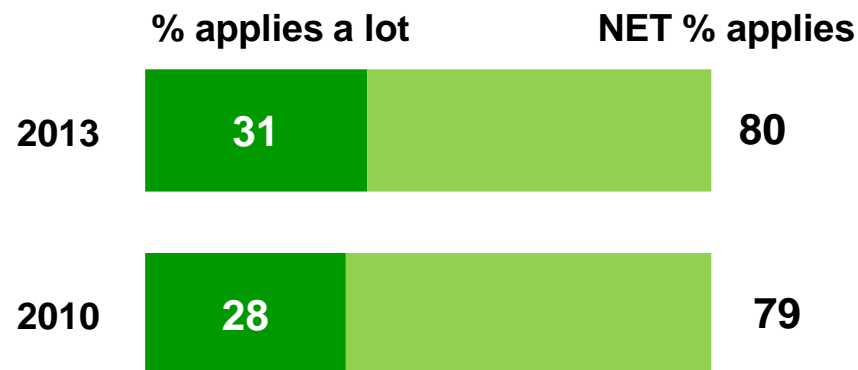
Claims of more healthy eating habits places New Zealand in third position overall, behind Spain (40%) and the US (33%).



In New Zealand, efforts to eat at least 5 portions of fruit and veg each day are relatively unchanged since 2010.

43

I try to eat at least 5 portions of fruit and veg per day



Two countries claim to have at least eight in ten adults who make efforts to eat the recommended '5 a day'. New Zealand is one of these and Spain (81%) is the other.



Consumption of both dairy and fruit and veg far outweigh high-fibre foods. New Zealanders are strong advocates of eating properly and having a balanced diet.

44

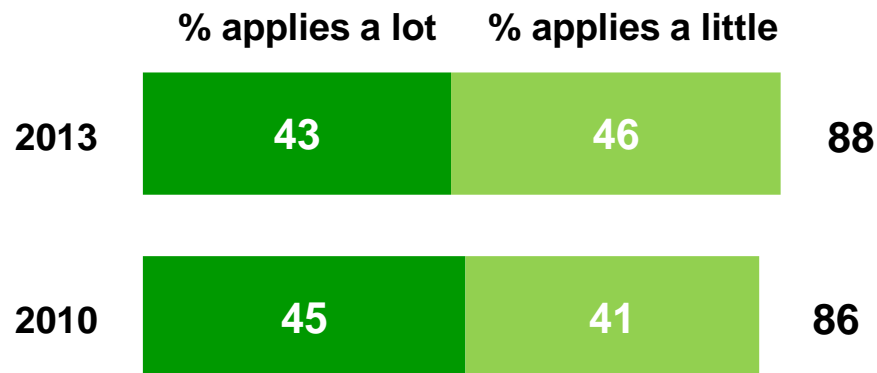




Endeavours to limit fast food consumption in New Zealand have stabilised in overall terms.

45

I try to limit the amount of fast food that I consume



While all countries are making efforts to reduce fast food consumption, the US (85%), Germany (84%) and GB (78%) are making the least effort. New Zealand ranks fourth.

There has been a decline in the proportion who believe that low fat will always indicate the healthy choice.

46

% applies that *'always look for low fat options when buying food products'*

2013

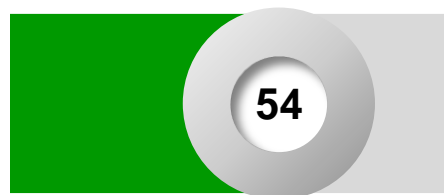


73

2013

% applies that they *'think of the calories in what they eat'*

2013



54

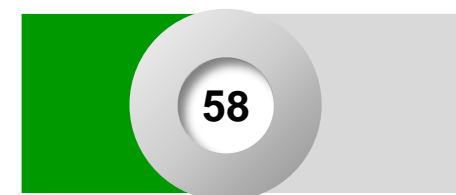
2010



53

% applies that *'if a label says 'low fat/reduced fat' then the product will always be the healthy choice'*

2013



58

2010



65

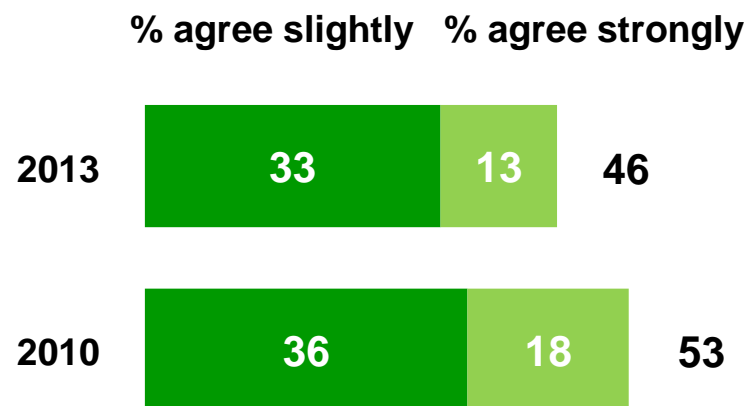
New Zealand ranks second in terms of looking for low fat products when shopping. It ranks fourth in terms of the thought it gives to calories and fourth also in its belief that low fat equals the healthy choice.



Concerns about ones children becoming obese have declined in New Zealand since 2010, with the biggest change being amongst those who 'strongly agree'.

47

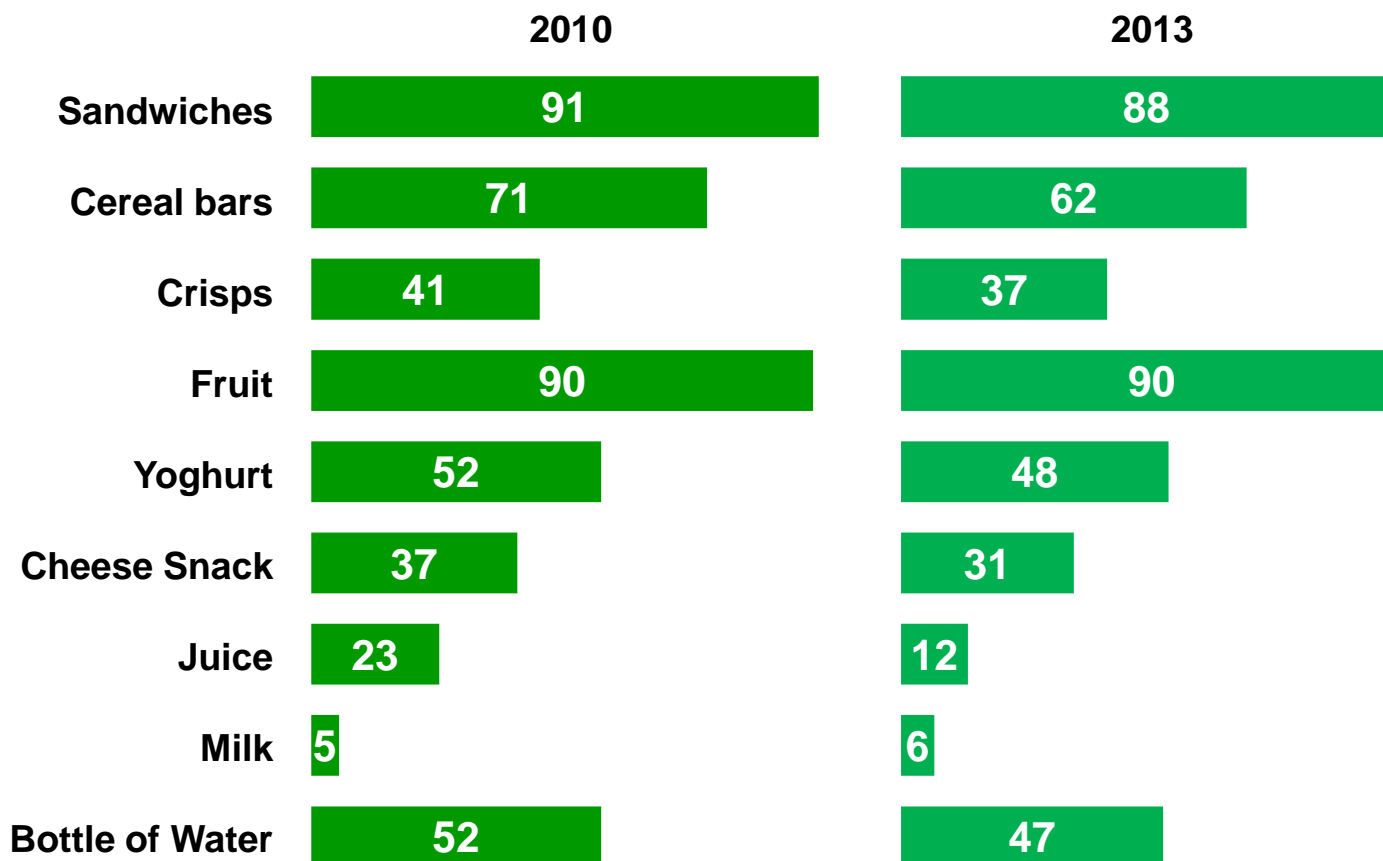
I am concerned about my children becoming obese



New Zealand ranks fourth in terms of concern about one's children becoming obese. Levels of concern are similar to that of the Belgium (49%) and the US (48%).

Sandwiches, fruit and water are the most popular lunchbox components in New Zealand. Cereal bars and juice have experienced the biggest decline in usage since 2010. 48

Content of kids' lunchboxes



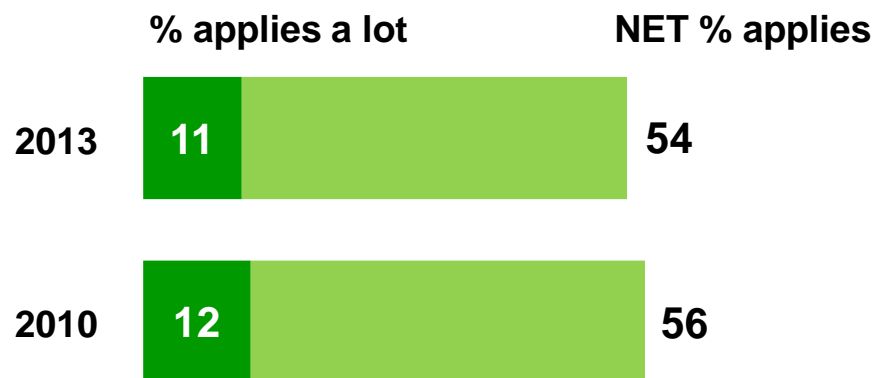
New Zealand displays the highest inclusion of fruit in children's lunchboxes compared to all other countries in the PERIscope 2013 study.



The belief that healthy foods are limiting and boring is held by more than half of all adults in New Zealand, a relatively unchanged proportion compared to 2010.

49

Choosing healthy food to eat is limiting and boring

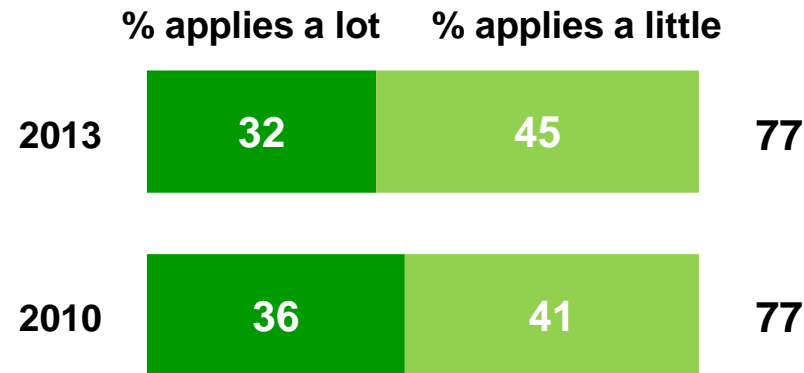


New Zealand ranks third overall in its belief that choosing healthy food is limiting and boring. It is therefore one of the more negative countries when it comes to views on the characteristics of healthy foods.



Compared to three years ago, the same proportion of New Zealand grocery shoppers are displaying a preference for having manufacturers help them to eat healthy.

I would like manufacturers to help me to eat healthy

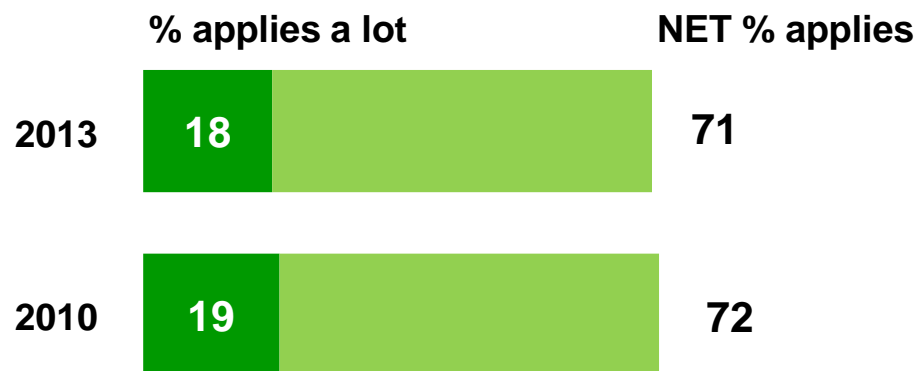


Compared to countries like Spain (94%), Germany (88%) and France (81%) the US displays a much lower preference for manufacturers helping them to eat healthy. New Zealand ranks fifth overall.



More than seven in ten New Zealanders display a willingness to pay a premium for healthy foods.

I am willing to pay a bit more for healthy food and beverages (as long as they taste good)

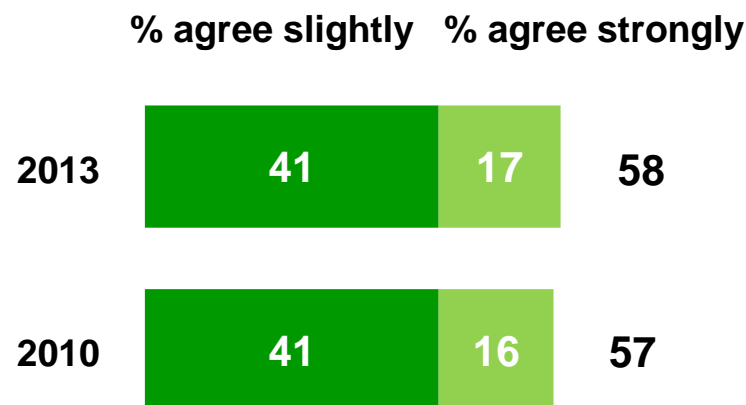


There are six countries in which more than 70% of adults are willing to pay more for healthy food and beverages. New Zealand falls just inside this group.

Eating healthy to take control of one's life is a behaviour adopted by just under six in ten New Zealand adults.

52

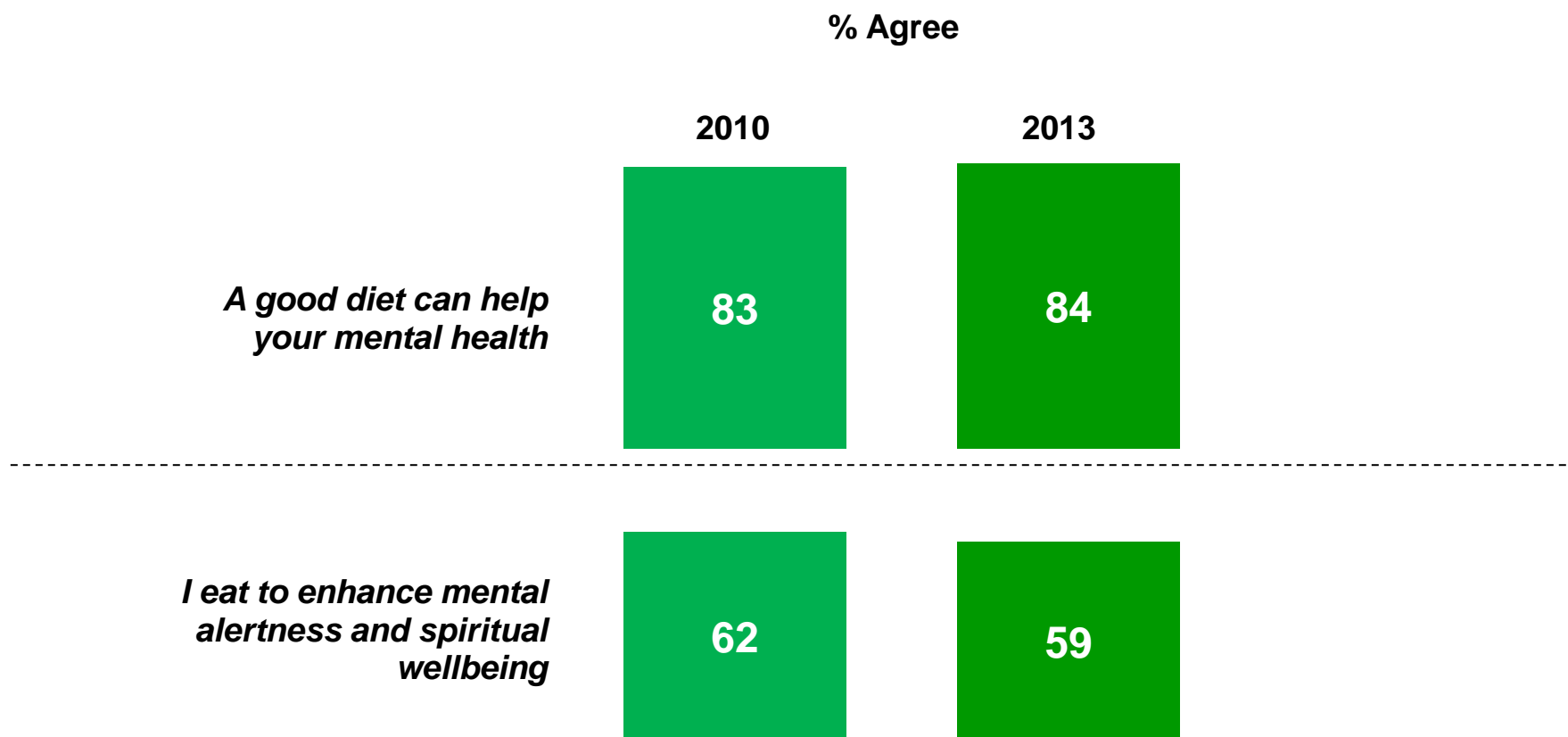
I eat healthy to take control of my life



With regard to the proportion who agree that they eat healthy to take control of their life, New Zealand ranks in the bottom three.



New Zealand has much stronger belief in the relationship between diet and mental health than it does about the link between food and mental alertness/ spiritual wellbeing.⁵³



New Zealand sits with the majority of countries in its high level of agreement with the idea that a good diet can help mental health. It displays one of the lowest beliefs that spiritual wellbeing can be affected by diet.



Three quarters of New Zealand grocery shoppers claim to always check the nutritional labelling on food prior to purchase.

54

**% applies that they 'always
check the nutritional labelling
on food before buying them'**



Checking for nutritional labelling on food before purchase is a behaviour most popular in Spain (85%) and the US(79%). New Zealand follows closely behind.



Difficulties in understanding both the nutritional claims on packaging and food labelling remain for a considerable amount of New Zealanders.

55

% applies that they 'often find it difficult to understand nutritional claims on packaging'

2013



70

2010



75

% applies that they 'often find it difficult to understand labelling on food'

66



70

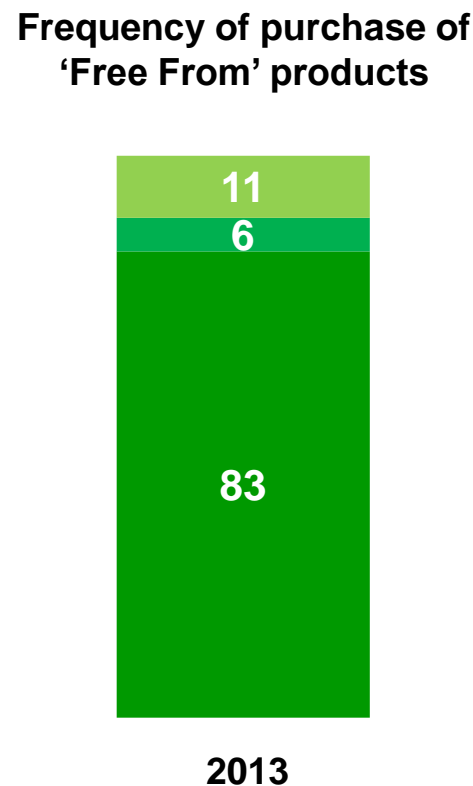
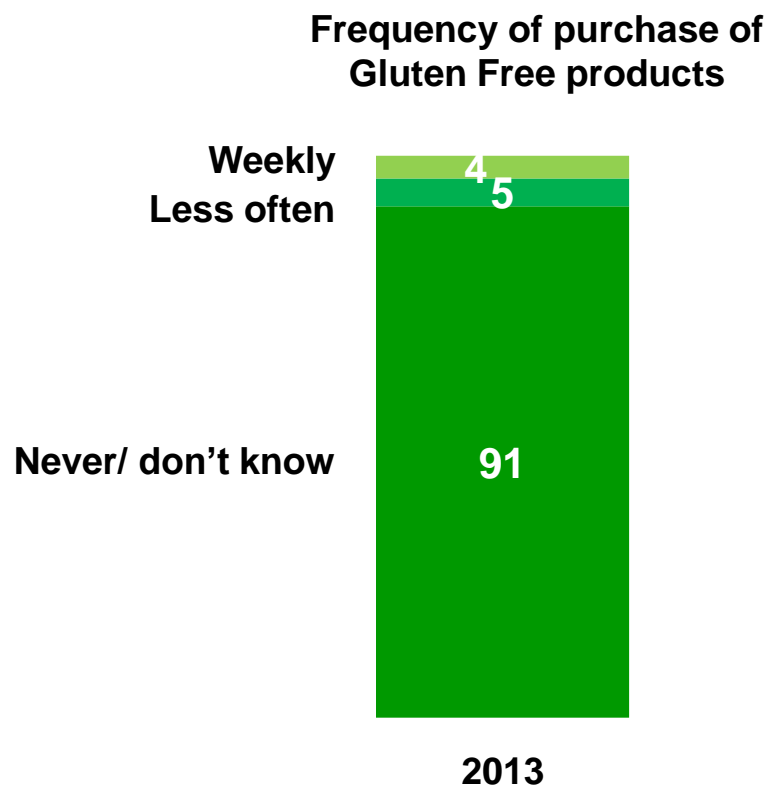


Of all the countries surveyed across the PERIscope 2013 study, New Zealand sits within the top five for difficulties experienced in understanding nutritional claims on packing and labelling on food.



In New Zealand, purchases of gluten free products are considerably lower than 'free from' products.

56



New Zealand fares similarly to the Netherlands, Belgium and France for purchases of gluten free products. Regarding 'free from' food, its purchases levels place it in the bottom four countries.

TAKEAWAYS



1

Food passion and practicality

- Relationship with food is positive, passionate and assured.
- Committed scratch cookers but pragmatic in view that speed and ease are essential for everyday life.
- Engages with ready prepared & convenience as a means to supplement more committed and enthusiastic cooking activities.



A convenient balance

- Use of ready prepared/ convenient foods has strong foothold.
- Demand for food that is easy, quick and convenient, yet, does not encroach upon positive food associations or impact negatively on overall expertise .
- Is conscious of calories, balance and limiting fast food so use of convenience should not compromise these criteria too much.



#3

Simple health claims connect

- Majority claim healthy diet.
- Approaches to health based primarily on '5 a day', 'low fat' choices and calorie considerations.
- Less inclined to connect with broader concepts of diet and mental health/ wellness/ alertness.
- Will respond to health products that provide measurement and guidance rather than sweeping claims.



#4

Information: overload & withdraw

- Awareness of 'green' issues not converting into spend.
- More responsive to 'sustainable' message rather than food miles/ carbon footprint/ Fair Trade/ etc.
- Tendency to seek information related to 'green' / providence/ quality is limited.



#5

Show me the money

- Hugely influenced by pricing messages, value for money offerings and the opportunity to get a bargain.
- Strong susceptibility to all things 'cheap' and potential to deviate from essential product territories if the price is right.
- Quality and customer service are pale enticements.

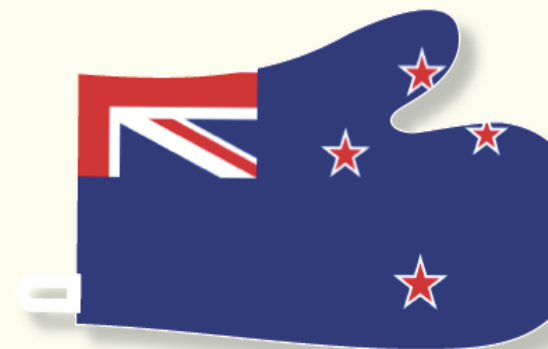


PERIscope2013



New Zealand

Consumers & Their Food



Growing the success of Irish food & horticulture

Bord Bia
Irish Food Board