

KANTAR

New Zealand Food Waste Survey

2021 Results

Presentation: 12th May



1

Background and summary



Kantar conducted the New Zealand Food Waste study in Q2 2021 to provide Rabobank and Kiwi Harvest with nationally representative collateral for PR purposes

Overview of methodology

Kantar conducted n=1,509 online interviews from **6th – 19th April 2021**

Data collection was **nationally representative** to ensure that results could be used to measure New Zealanders attitudes and behaviours

An additional **sample boost** was included to provide greater granularity around **rural** New Zealanders whilst those **aged 65+** were also included in this wave



Overview of analysis and weighting

Data was post-weighted to ensure results are nationally representative – with results compared to 2019 where questions were consistent

Significant differences throughout the report are summarised using the following icons



Key insight

Supporting evidence and implications

Kiwis' attitudes and concerns

COVID-19 had a significant and profound impact on New Zealanders – most notably through forced adaption to behaviours though not all of them are seen negatively. Most notably improved work life balance, a simpler life and a focus on family and health emerged as experiences New Zealanders wished to continue

- Rabobank can ensure messaging, comms and initiatives reflect these changing behaviours and attitudes
- The reconnection with New Zealand cultural values can also be reflected in Rabobank's branding and communications tone and brand representation
- Consideration should be given to the adaptation of behaviours such as flexible working and supporting local – whilst digital channel effectiveness will continue to play an important role along with ongoing messaging around sustainability

New Zealanders remain most concerned about the cost of living in the next ten years – with energy prices and sustainability / environmental issues next most likely to be of concern

- Whilst the cost of living is a universal concern, environmental and sustainability issues are much more concerning to younger New Zealanders – particularly those in Generation Z and Y. Conversely Baby Boomers & Beyond are more concerned around technology security. This has clear implications on the mindset and likely resonance of communications for different age groups

Attitudes towards finance

Post COVID-19 more New Zealanders feel more financially stable, are financially aware and planning for the future

- This suggests the forced introspection of COVID-19 has resulted in New Zealanders taking a closer look at their financial situation
- This is coupled with New Zealanders having fewer clear savings drivers (e.g. reduced savings for travel) and resulting higher savings balances
- As a result, New Zealanders are now more likely to have sustainable long term savings across a more diverse range of channels whilst using a greater range of advice sources



Key insight

Supporting evidence and implications

<p>1. New Zealanders have seen increasing price pressure on food resulting in increased household spend in 2021 relative to 2019</p>	<ul style="list-style-type: none"> - The food price index remains high relative to the 2019 wave – New Zealanders are spending more on food than ever before
<p>2. Awareness and knowledge of farming and food production has increased – whilst perceived importance of the industry and the desire to ‘support local’ continue to grow</p>	<ul style="list-style-type: none"> - As awareness and knowledge of the food production industry are stronger amongst rural, male and older New Zealanders consider methods of engaging younger Gen Y and Gen Z New Zealanders potentially through messaging around environment and sustainability - The key driver for buying local is to support local business – a message that is particularly engaging post COVID-19. As such any messaging around supporting local (e.g. local staff, locally developed offers) are likely to resonate strongly
<p>3. Meat consumption overall is expected to continue to decline (primarily for perceived health reasons) whilst simultaneously awareness and openness to meat alternatives has grown significantly</p>	<ul style="list-style-type: none"> - All meat alternatives see an increase in awareness and openness - Continue communications around availability of meat alternative sources to convert the interest and potential trial conversion
<p>4. Frequency of eating out and usage of food delivery services have both seen significant increases in 2021</p>	<ul style="list-style-type: none"> - This is particularly the case for younger (Gen Z, Y) and urban New Zealanders – but is potentially tied to negative food waste behaviours. Consider messaging around the fact that ‘local’ products are a key factor in food delivery
<p>5. New Zealanders are more likely to be getting their ‘5+ a day’ than in 2019</p>	<ul style="list-style-type: none"> - There is a clear skew towards females, Gen X and Baby Boomers & Beyond and rural New Zealanders so initiatives to drive behaviour amongst other groups should be considered - Cost remains the number one barrier to fruit and vegetable options – though other factors (time to prepare, time to shop and knowledge on preparation) are playing an increasingly significant role. This suggests that imperfect fruit / veggies could be used a potential cost solution
<p>6. Understanding of ‘Use By’ stickers is relatively strong compared with ‘Best Before’ stickers</p>	<ul style="list-style-type: none"> - Consider clarifying communications around ‘Best Before’ stickers – in particular that food can be eaten past the specified date
<p>7. Imperfect fruit and vegetables are equally preferred (where a price differential exists) with more New Zealanders having ever bought them or seen them sold locally</p>	<ul style="list-style-type: none"> - This suggest they are becoming more acceptable to consumers – though we are yet to see a significant increase in likelihood to purchase (though if awareness increases this would still result in an absolute consumption increase)



Key insight

Supporting evidence and implications

1. New Zealanders are now wasting less of their food spend than in 2019– though due to the increase in both food prices and the number of households since this time the total value of food waste has increased

- This is a double edged sword – and can be utilised from a positive (reduced percentage of waste) or negative (higher value of food wastage) perspective
- Clear target groups exist – with younger (Gen Z and Gen Y) having higher proportions of food waste – and also having greater incidence of disposing of unopened / tried food – suggesting targeted collateral or communications at these younger age groups
- Consider tying any communications to the ‘supporting local’ message or ‘financial waste’

2. Fruit and vegetables are most likely to be wasted by New Zealanders – with wasted money and guilt at others going without food key concerns

- Accounting for two thirds of the ‘most wasted foods’ fruit and vegetables should be a clear focal point for communications encouraging reduced food waste
- Again, this can be tied to the ‘supporting local’ messaging or potentially the opportunity cost of food waste in terms of going to those who need it (again potentially a ‘support local’ message could be extended to this space)

3. There have been a number of positive behaviour shifts since 2019 around food wastage

- New Zealanders are more likely to be eating leftovers, considering portion size, freeze uneaten food, eat food past the ‘best before’ date in 2021
- Food waste is seen as significant annoyance which suggests further reasons for reducing food waste would be received positively
- New Zealanders are also increasingly willing to pay a premium for local, humane / hormone free / organic, sustainable or local-producer supporting foods suggesting these can be leveraged / communicated further
- More New Zealanders are using worm farms / compost and growing their own fruits and vegetables – however the challenge remains engaging younger and urban New Zealanders

2 What's keeping Kiwis up at night?



New Zealanders remain **most concerned** about the increasing cost of living – with COVID-19 a **significant concern** for half of New Zealanders

Sustainability, loss of species, climate change and dealing with waste are also key concerns for Kiwis

However, **sustainability** is more of a concern for **younger New Zealanders** – with Baby Boomers relatively concerned about **technology related security**



The impact of COVID-19:

An altered relationship with time allowed many people to rediscover a range of valued experiences

VALUE 1 : Time

Hyper-fast

Individual

Detached

Hyper-connected

Concern for Me

More

Occasions / peak events

Time

Slow

Collectivist

Aligned

Connected

Concern for others

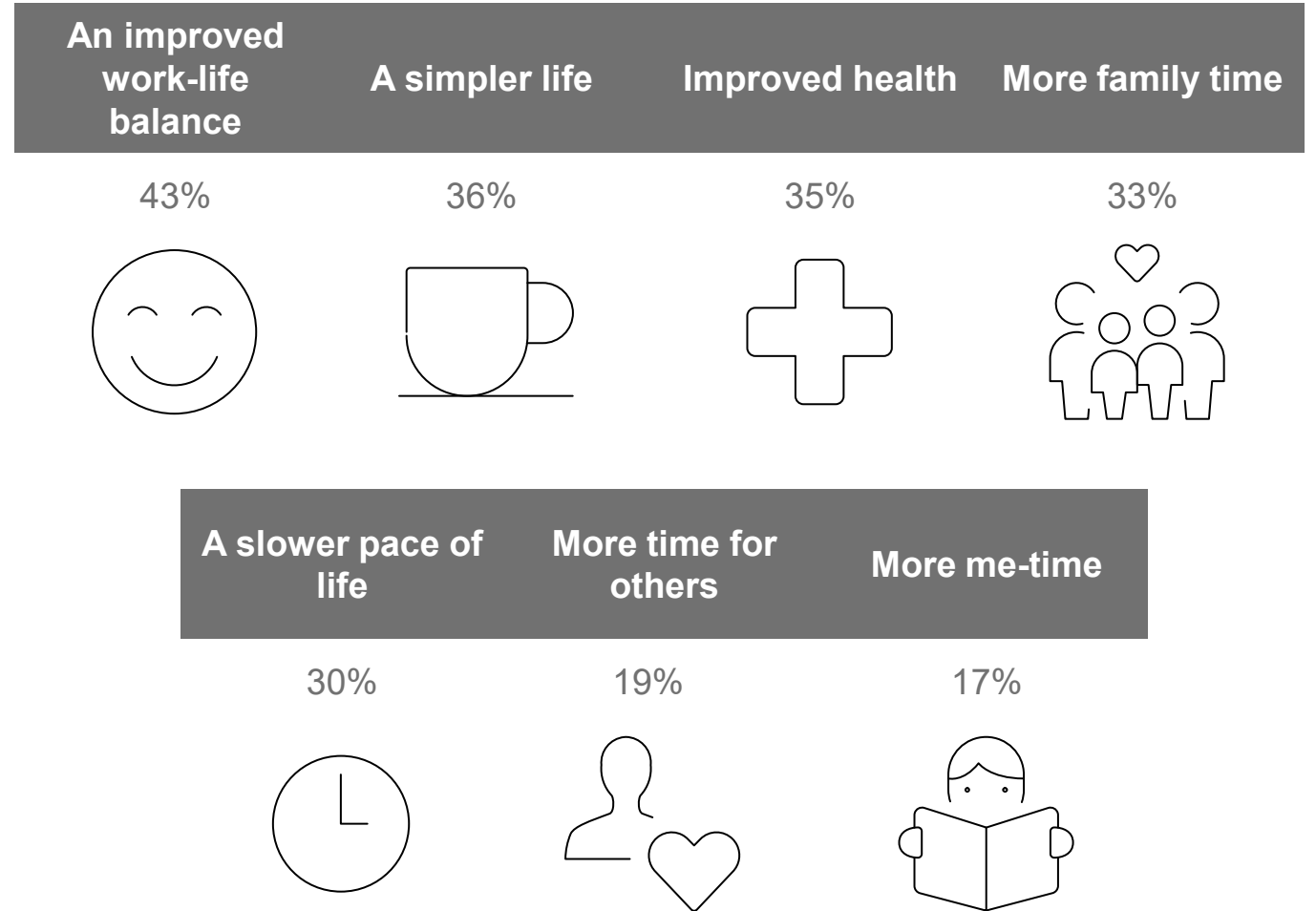
Less

Everyday small moments

95%

of NZers want at least one of these different experiences to continue

Which of the following would you like to continue or prioritise going forward?



We have re-connected with our cultural values, most notably our humour, practicality, inclusivity/acceptance/fairness and connection to the environment

VALUE 2 : NZ'ness

% Value this NZ'ness attribute more than before



There are six major observed behaviours that we observed



COOKING AT HOME

FLEXIBLE WORKING

BUYING LOCAL

ONLINE SHOPPING

SUSTAINABLE LIVING

LIVING ONLINE

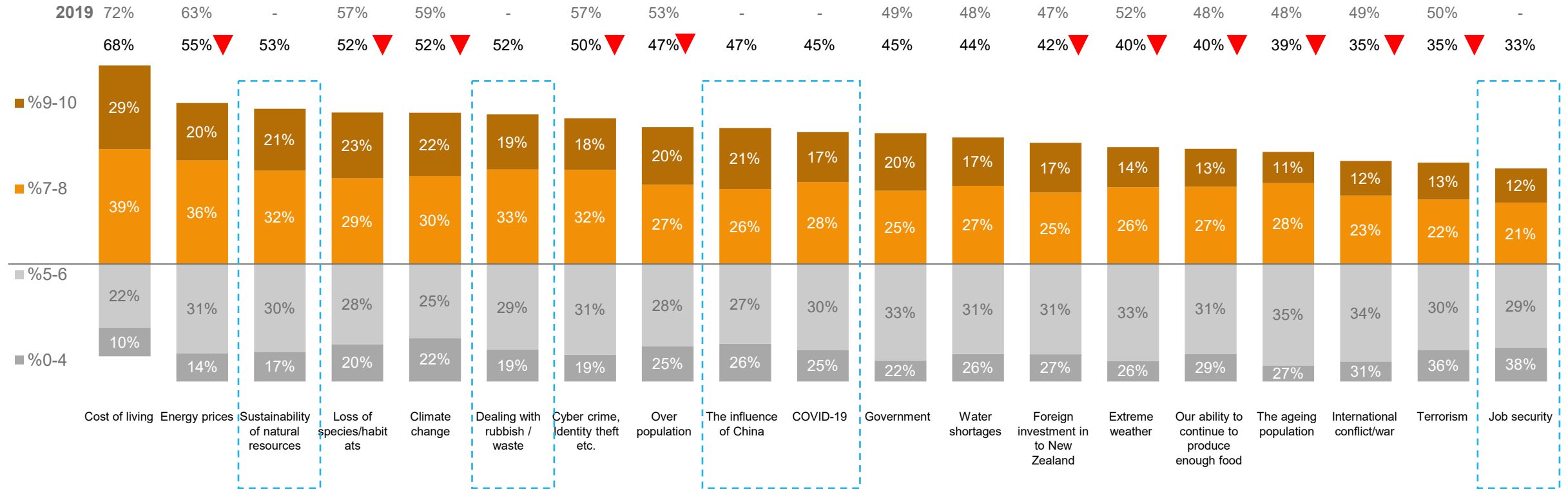


The behaviours with the greatest likelihood of continuing are flexible working, buying local and online shopping among a dedicated minority



New Zealanders continue to be most concerned with cost of living – whilst energy prices and environmental concerns such as sustainability, loss of species and climate change also resonate

Concerns facing New Zealanders (next ten years – all NZers)







Base n=1,502

▲ Significantly higher
▼ Significantly lower

There is concern for cost of living across all ages whilst climate change and sustainability rank higher for younger New Zealanders whilst energy prices and cyber crime concern rises with age

Key concerns (next ten years) by age group

				
1	Cost of living 67%	Cost of living 73%	Cost of living 69%	Cost of living 64%
2	Climate change 61%	Climate change 59%	Energy prices 58%	Energy prices 63%
3	Sustainability of natural resources 57%	Sustainability of natural resources 57%	Sustainability of natural resources 50%	Cyber crime, Identity theft etc. 61%
4	Dealing with rubbish / waste 55%	Dealing with rubbish / waste 56%	Over population 49%	The influence of China 57%
5	Loss of species/habitats 53%	Loss of species/habitats 53%	Loss of species/habitats 48%	Loss of species/habitats 54%
6	Over population 45%	Energy prices 49%	Government 46%	Dealing with rubbish / waste 51%
7	Energy prices 45%	Over population 47%	Dealing with rubbish / waste 46%	Sustainability of natural resources 51%
8	Our ability to continue to produce enough food to meet our needs in the future 42%	COVID-19 47%	Climate change 45%	COVID-19 51%
9	The influence of China 42%	Our ability to continue to produce enough food to meet our needs in the future 46%	Cyber crime, Identity theft etc. ' 45%	Foreign investment in to New Zealand 50%
10	Cyber crime, Identity theft etc. ' 41%	Cyber crime, Identity theft etc. 45%	Water shortages 44%	Government 49%

Base n=1,502

3
How are Kiwis food and shopping behaviours changing?



Increased food prices have contributed to greater household food spend – with a third of Kiwis now spending \$200 or more per week

Usage of food services such as Uber Eats, Hello Fresh and My Food Bag has significantly increased – nearly a third of Kiwis have used Uber Eats in the past year

Knowledge of food production has increased with a third of Kiwis now claiming to know at least 'quite a bit' – with **perceived importance** to New Zealand also increasing

Three quarters cite preference for **supporting local** as the key reason for preference in buying direct from farmers / growers

Whilst the proportion of Kiwis looking to **decrease meat consumption** has remained **stable**, awareness and **openness towards meat alternatives** has significantly increased

More Kiwis are now getting their 5+ a day with nearly two thirds saying they are eating a minimum of 3 servings of veggies and 2 fruit at least 'most of the time'

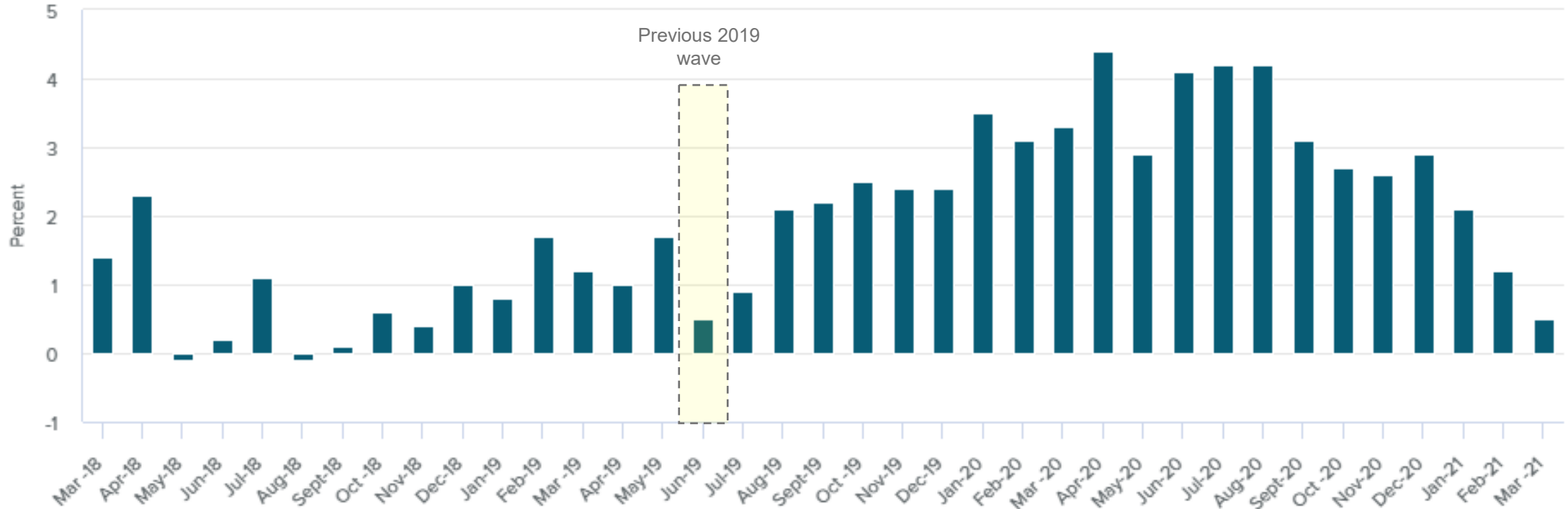
Understanding of **'Best Before'** is not as strong as **'Use By'** – two thirds believe food should be eaten by the 'UB' date versus just over half understanding food is still safe to eat after 'BB' date

Preference is split between **cheaper imperfect vegetables** and full price – though more Kiwis have bought imperfect veggies in 2021



New Zealanders have experienced significant food price index pressures particularly through COVID-19 since the last wave of research

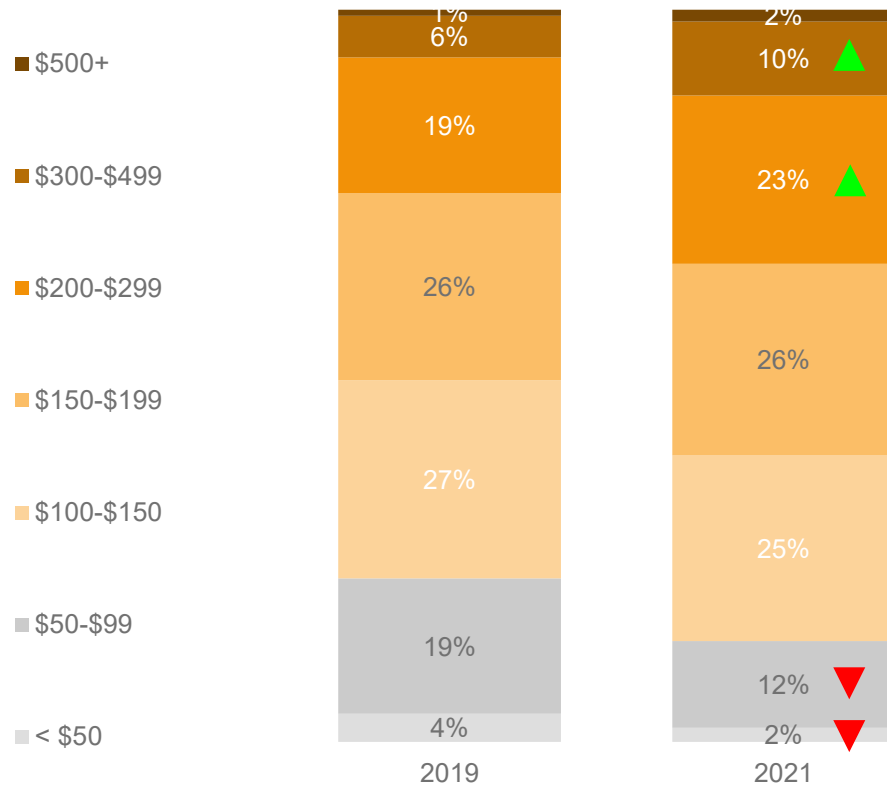
Food price index annual change, March 2018–2021



Stats NZ

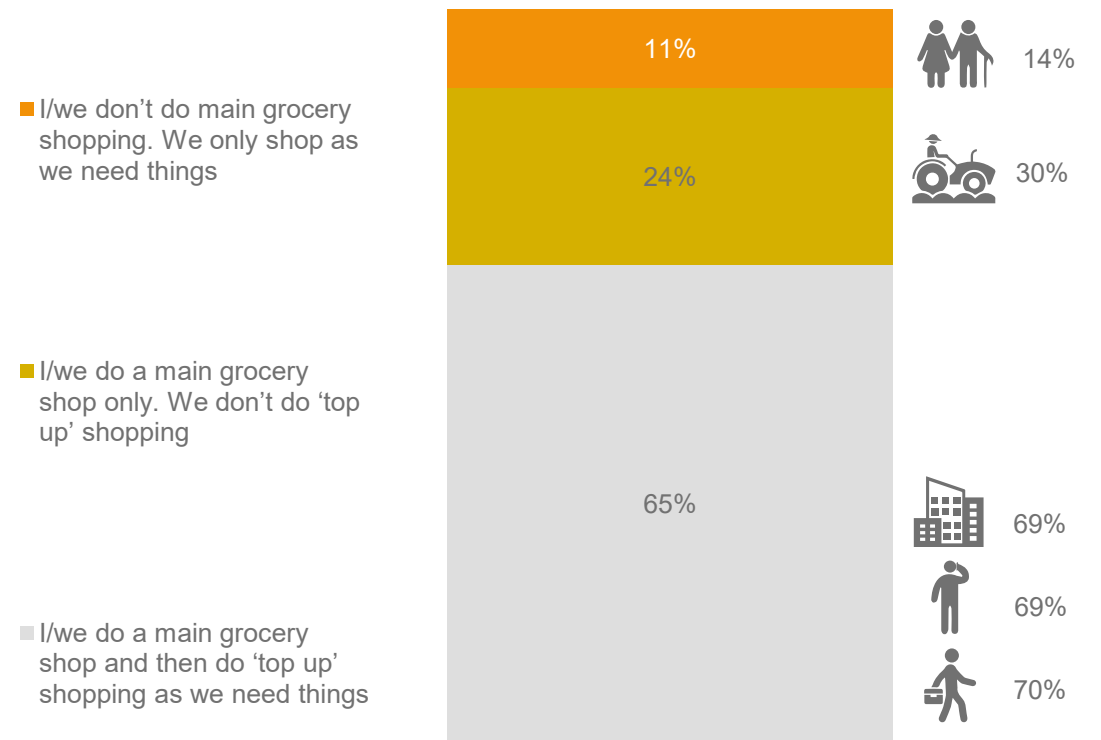
As a result New Zealanders are spending on average more on household food in 2021 whilst two thirds of New Zealanders do a combination of main and top up shops

Household food spend (average week)



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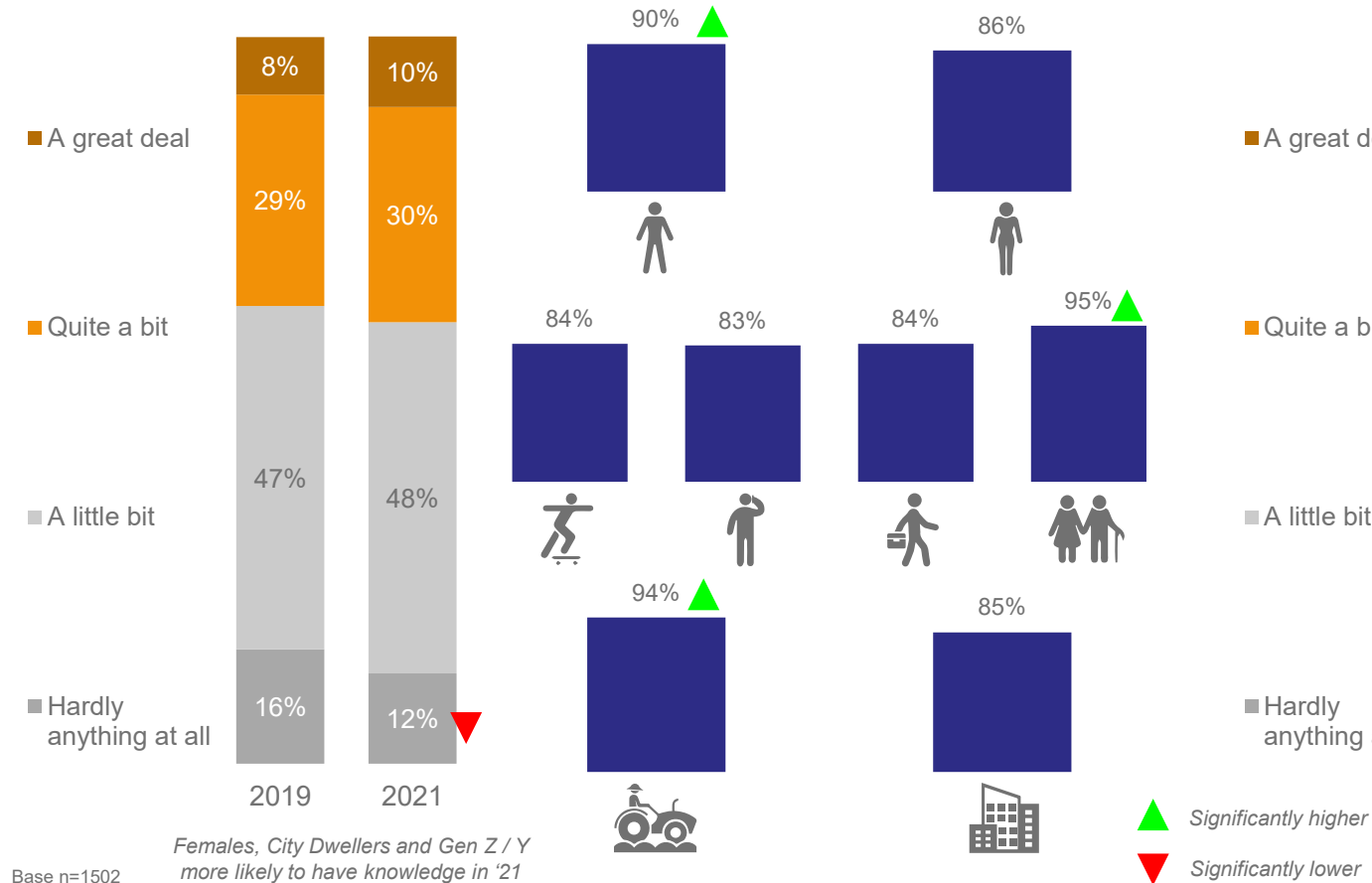
Typical grocery shopping behaviour



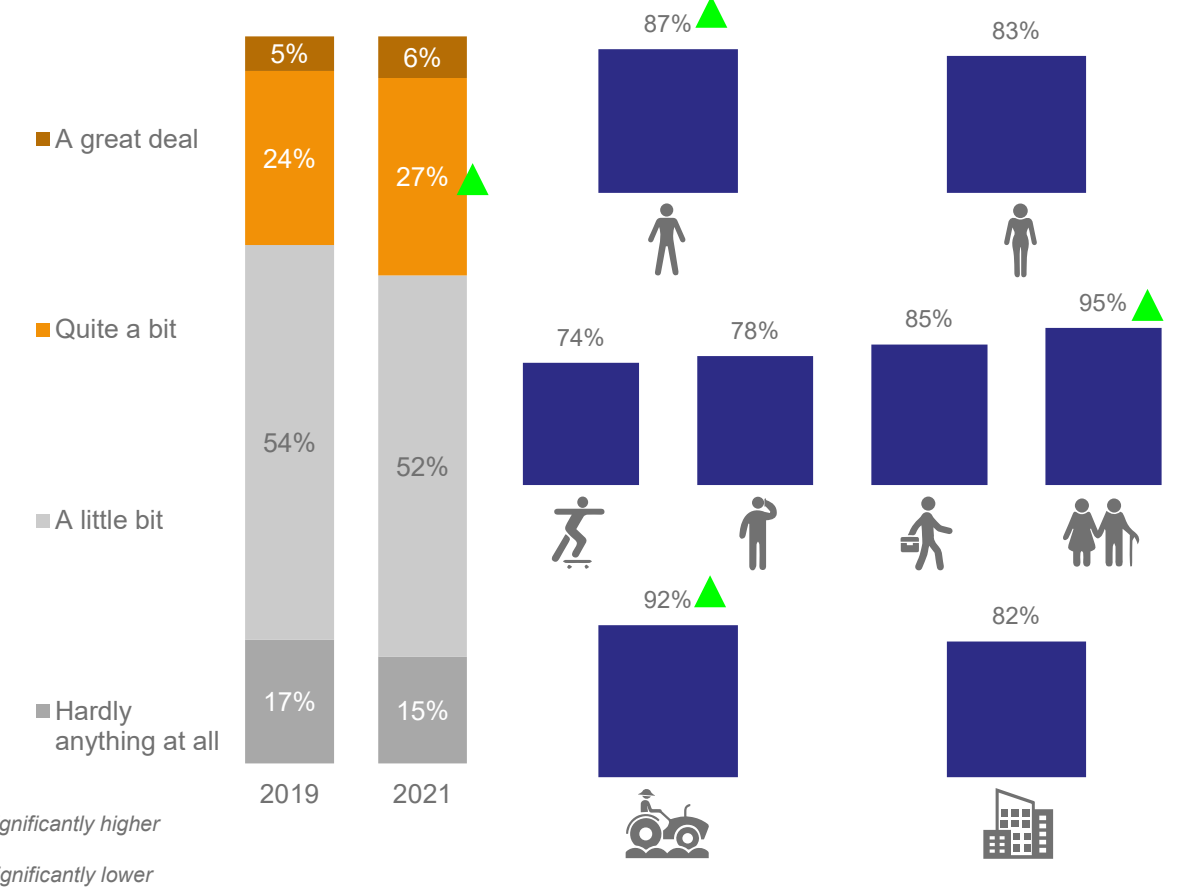
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Knowledge of farming in New Zealand continues to improve indicatively whilst knowledge of food production has also increased since 2019

Knowledge of farming in New Zealand



Knowledge of food production in New Zealand

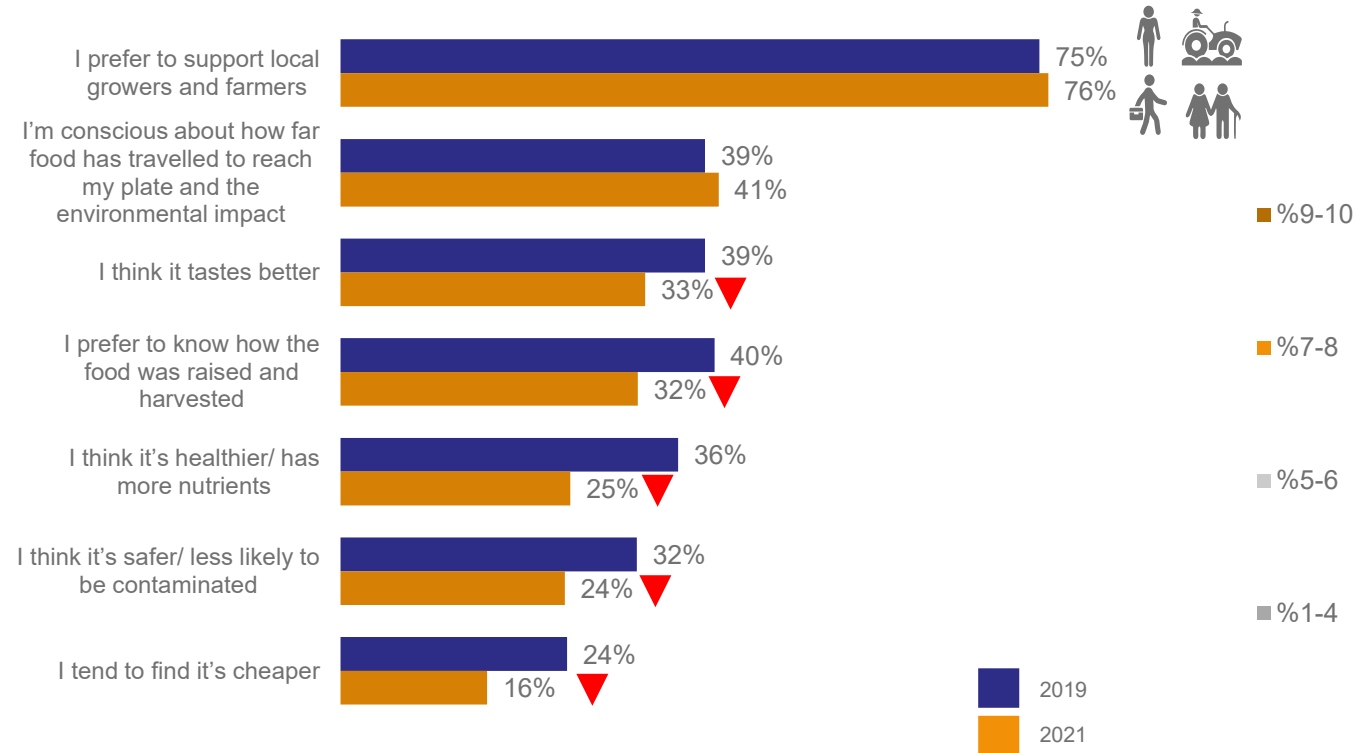


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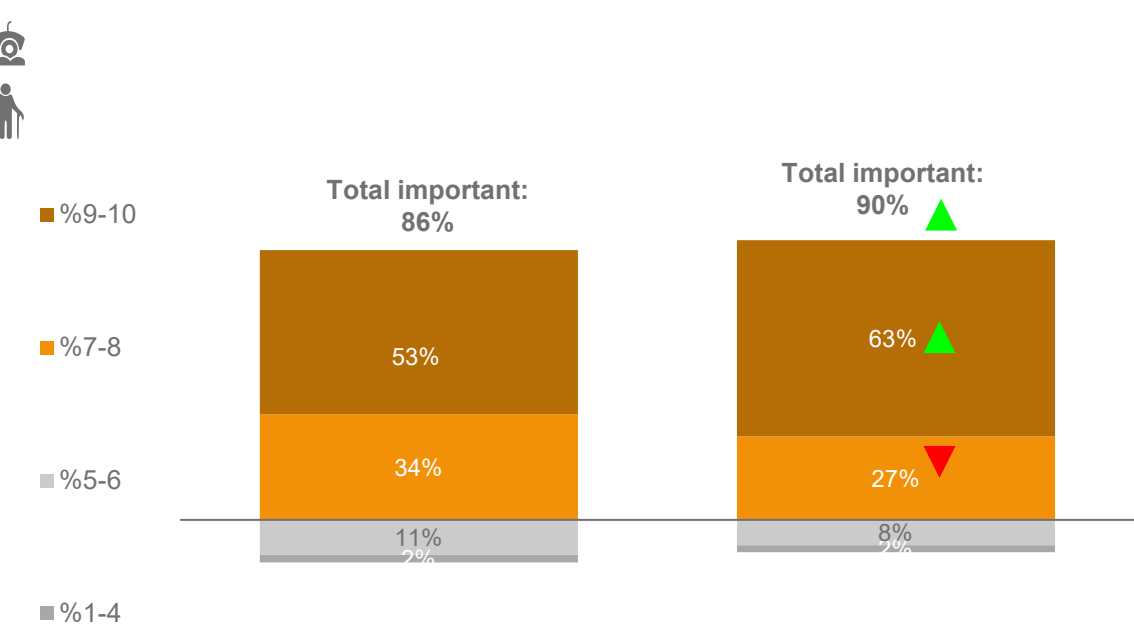
Females, City Dwellers and Gen Z / Y more likely to have knowledge in '21

Preference for buying local remains centred around supporting the local producers – whilst the broader industry is seen as increasingly important

Reasons for locally produced food preference (agree would like to buy direct from grower / farmer more often)



Perceived importance of farming and food production to New Zealand

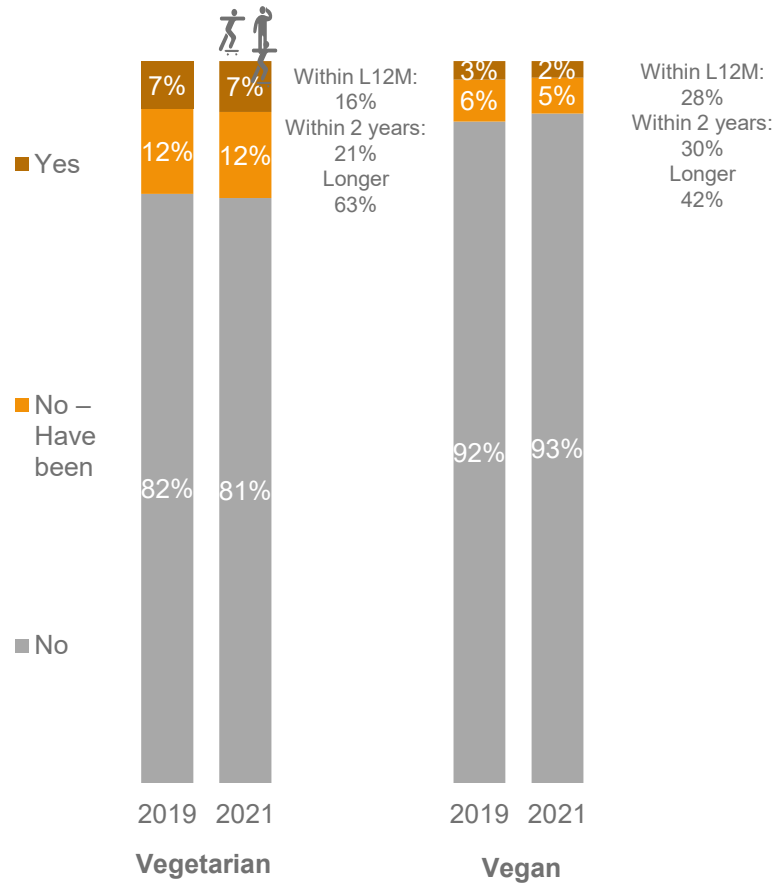


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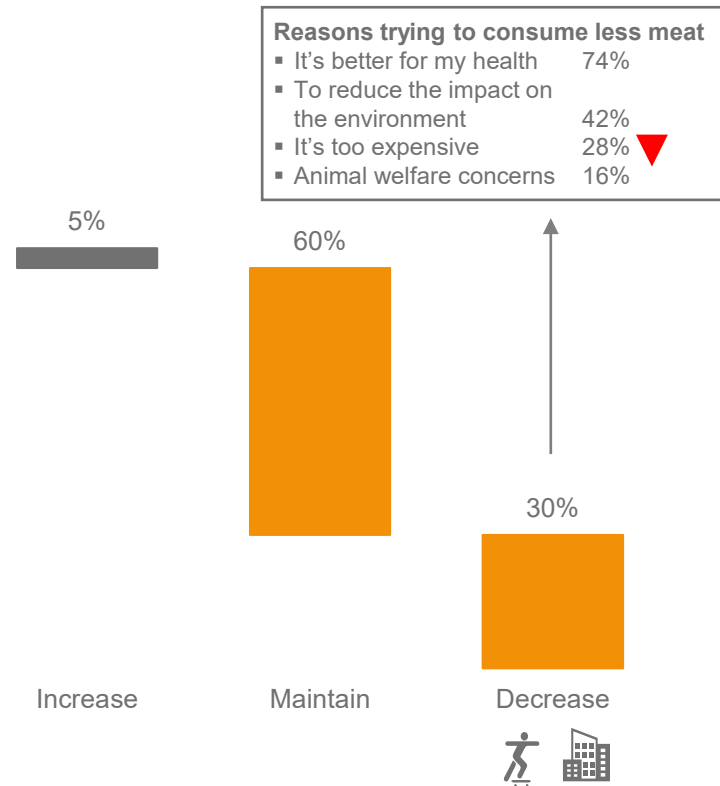
The number of vegetarians and vegans remains consistent with 2019 – whilst a third plan to decrease their meat consumption positively awareness and acceptance of meat alternatives has increased

Food behaviours – Vegetarian and Veganism

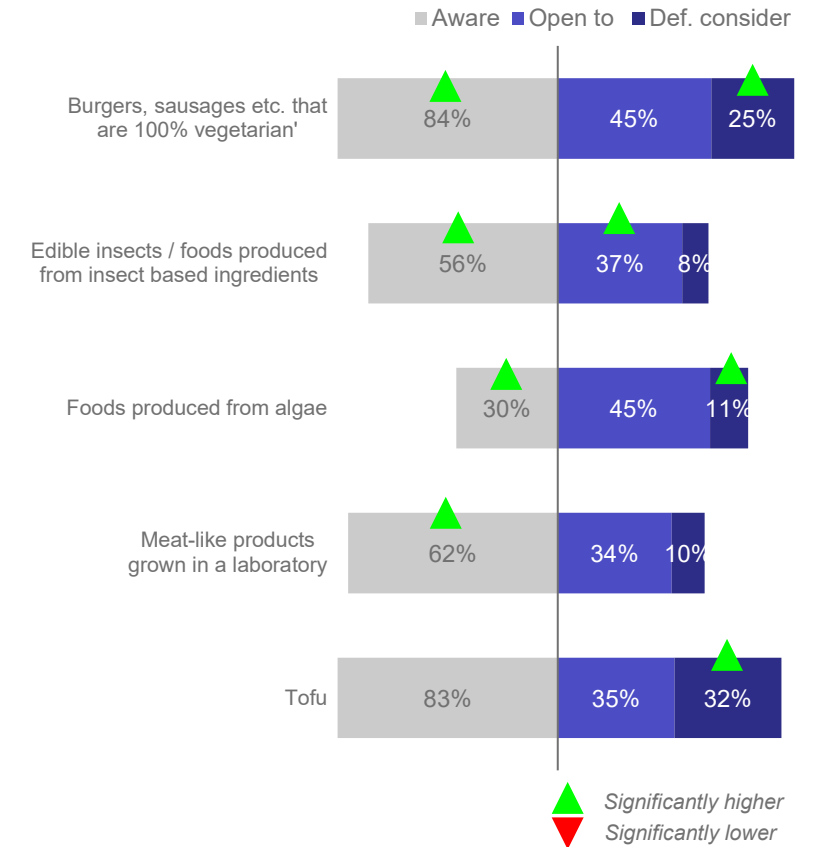


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Desired changes in meat consumption

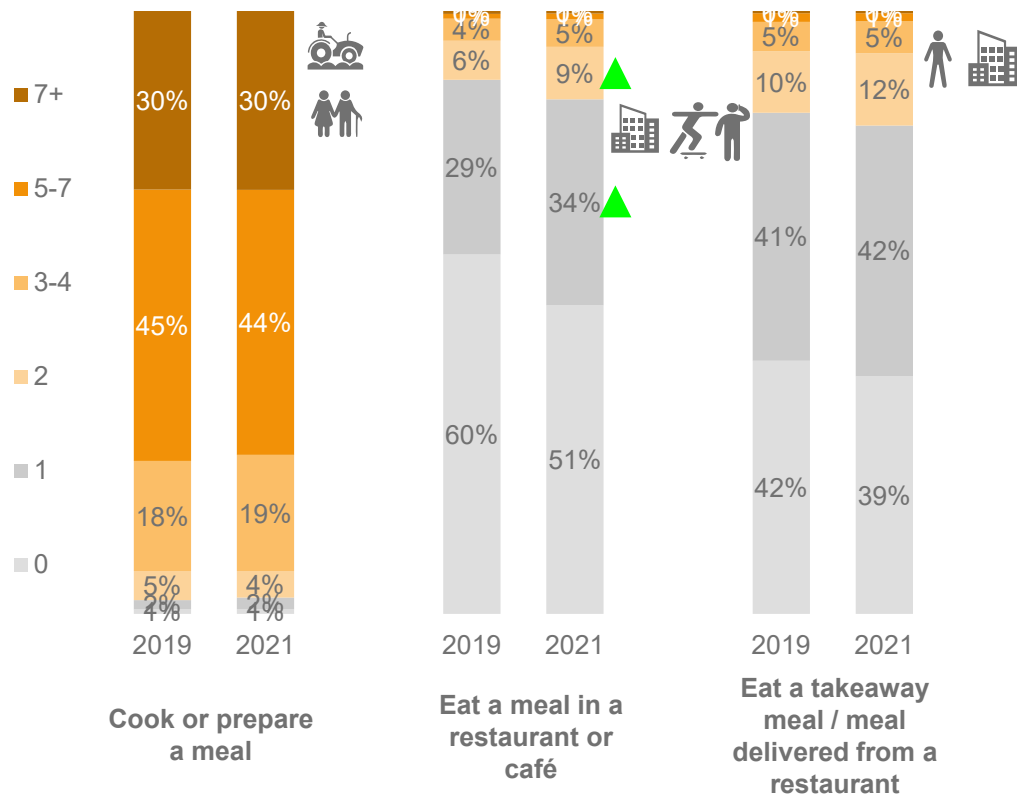


Awareness and openness to adding meat alternatives to diet

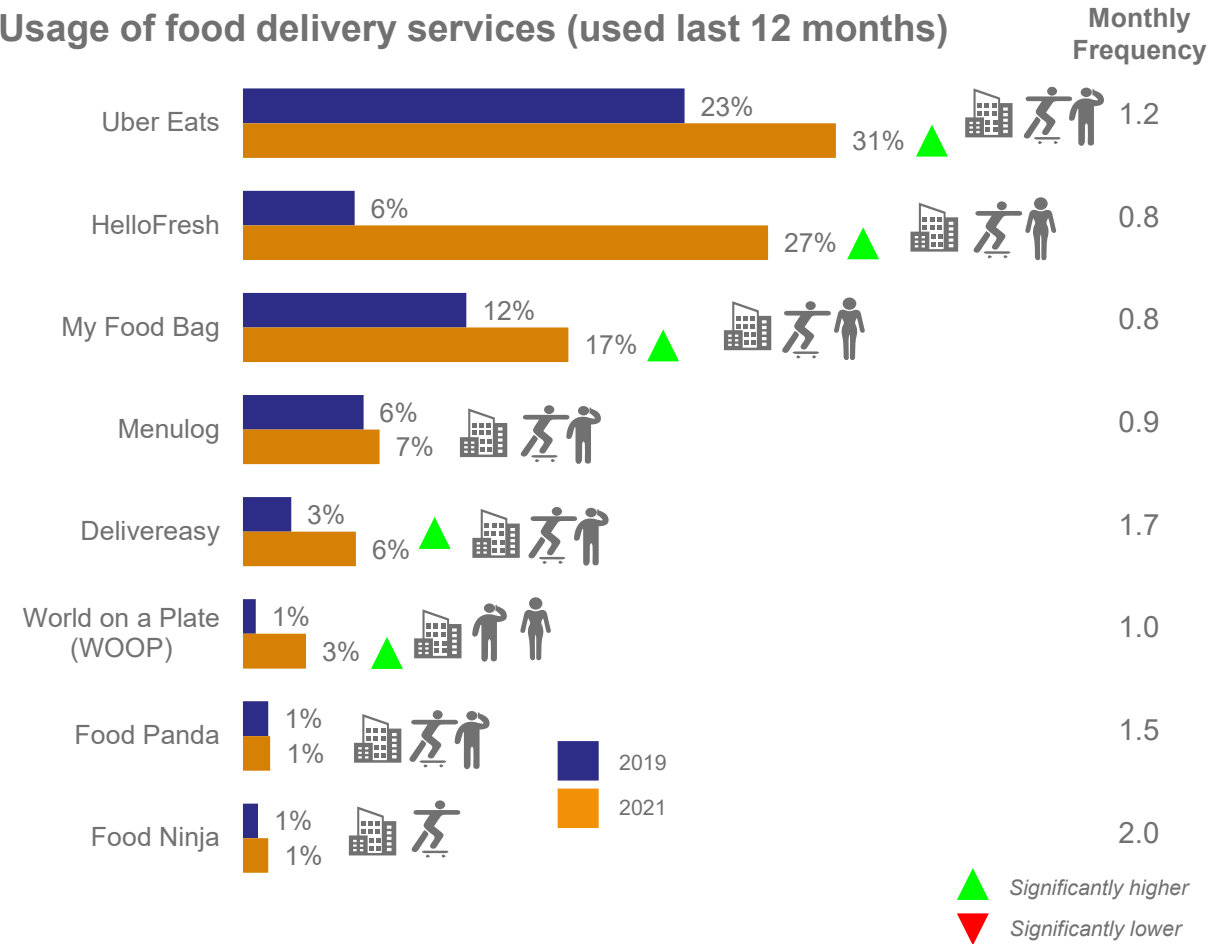


New Zealanders are more likely to have eaten a meal out in 2021 – whilst usage of almost all food delivery services has increased since 2019

Frequency of food consumption (times per week)



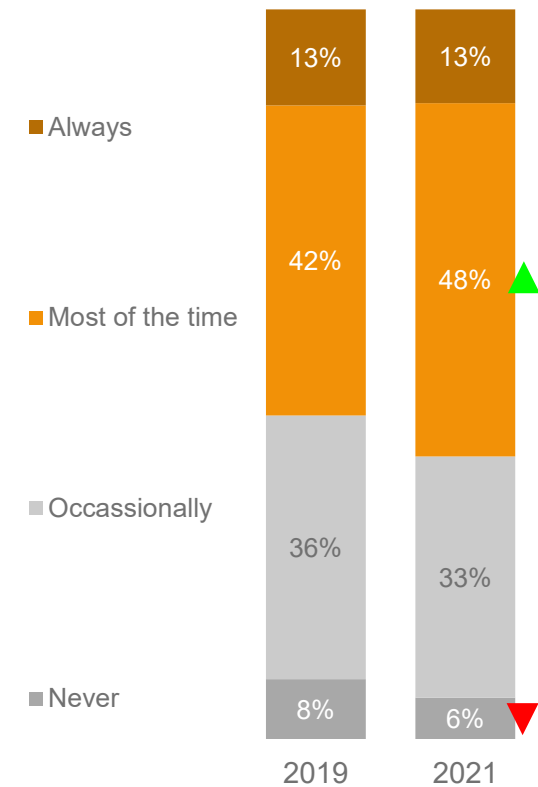
Usage of food delivery services (used last 12 months)



Base n=1502

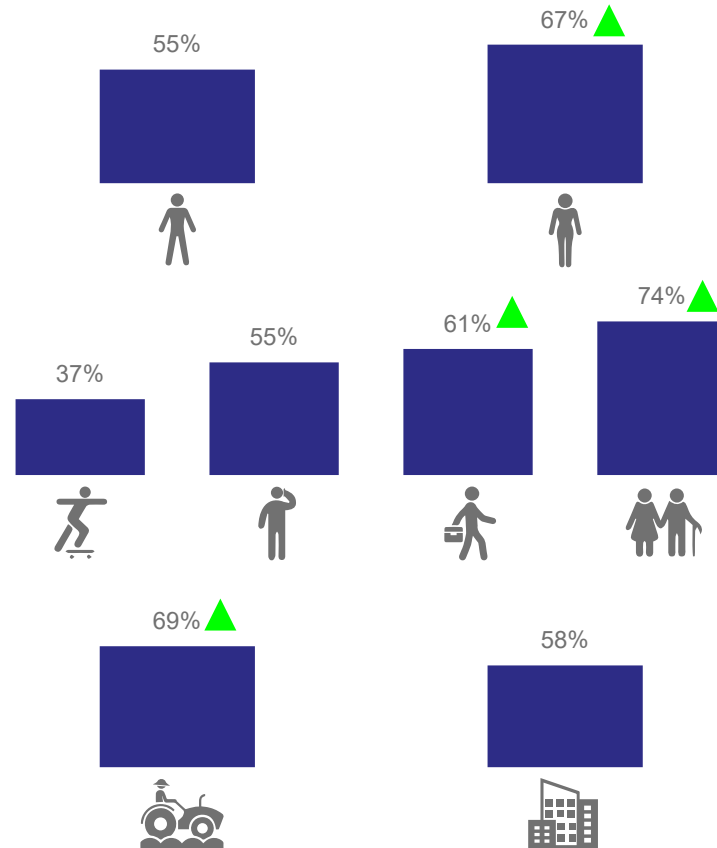
More New Zealanders are getting their 5+ a day in 2021 – with time to shop and prepare becoming more significant factors for those not

Frequency eating a minimum of 3 servings of veggies and at least 2 fruit each day

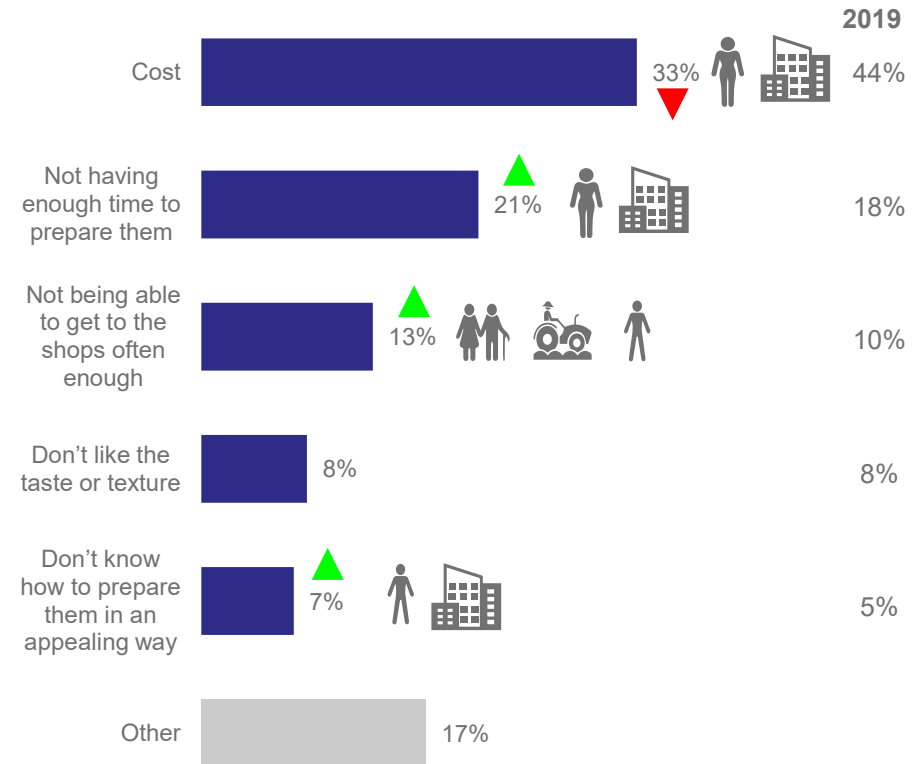


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Demographics 'Most of the time' / 'Always'



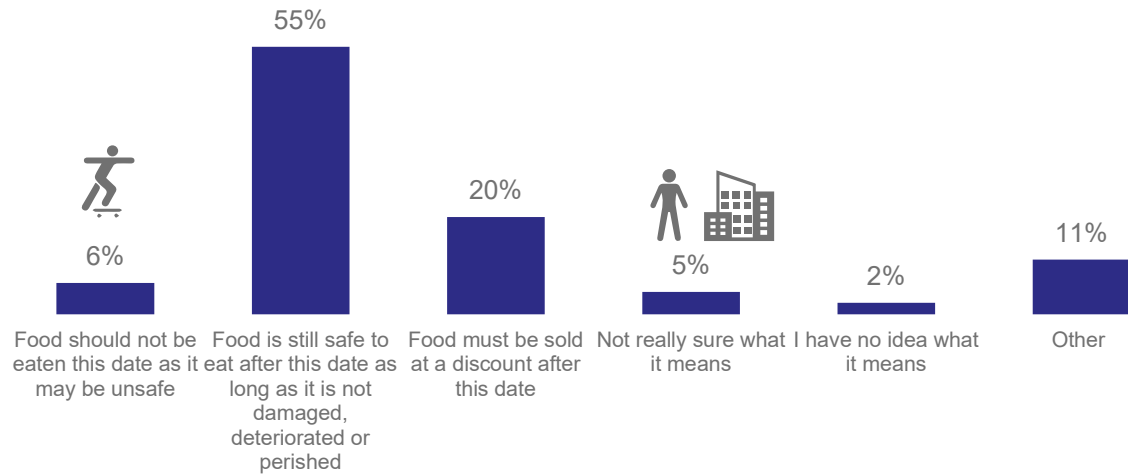
Key obstacle to eating more fruits and vegetables (amongst those not always getting 5+ a day)



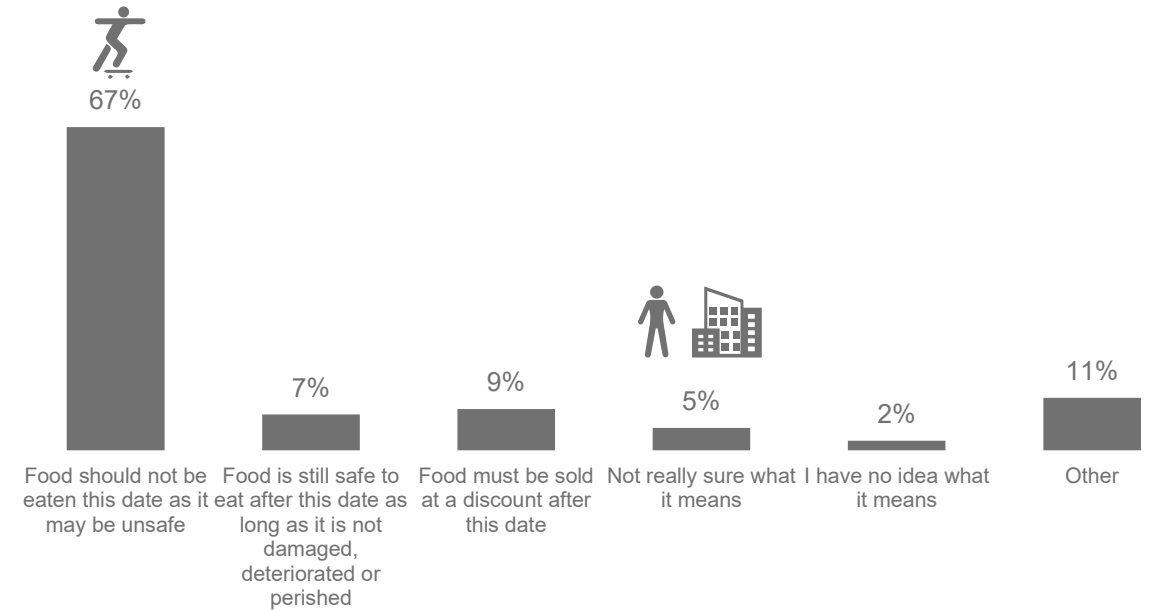
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More than half believe food with 'best before' stickers is still safe to eat after the date – whilst two thirds believe food should not be eaten after a 'use by' date

Understanding of 'best before' sticker



Understanding of 'Use by' sticker



Base n=1502

Opinion remains split in terms of preference between cheaper imperfect fruit / vegetables and more expensive regular appearance vegetables – though penetration of purchasing and availability of imperfect vegetables in increasing

Preference for vegetables



\$3.99 per kg

39%



\$1.30 per kg

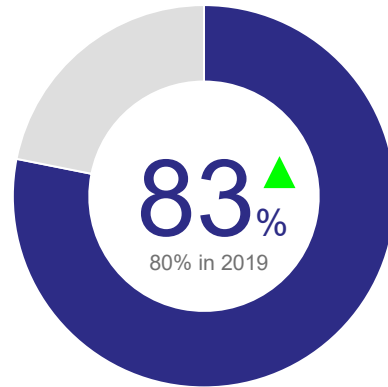
43%



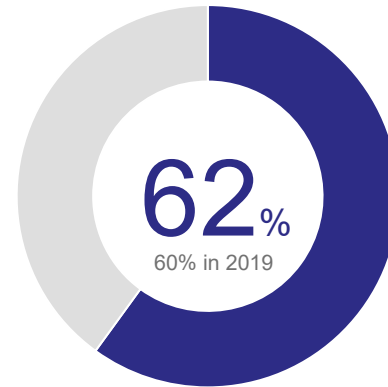
18% No preference

Attitudes to imperfect fruit / vegetables

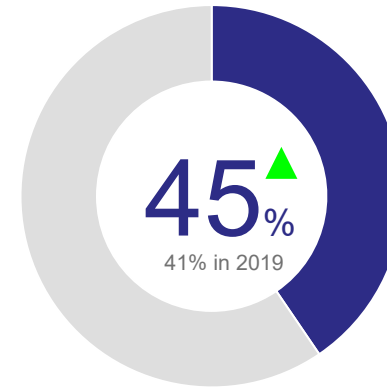
Ever bought imperfect looking vegetables



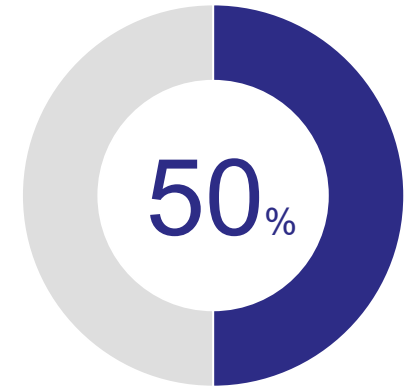
Likely to purchase if available



Local supermarket / farmers market sell imperfect looking fruit / vegetables



Aware availability of ugly fruit to consumers is a strategy used to reduced food waste



Base n=1502

▲ Significantly higher
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4
**Are Kiwis becoming more waste
conscious?**



Approximately **9% of all household food spend is estimated to go to waste** by Kiwis – with food going off before being able to eat it the number one cause

Just under half of Kiwis have **thrown away purchased food** before trying or eating in the last 12 months

Fruit and vegetables account for around two thirds of all food waste ahead of bread – with meat wasted to a much lesser degree

Half of Kiwis see **wasted money as the main concern** around food waste ahead of feelings of guilt around others being in need

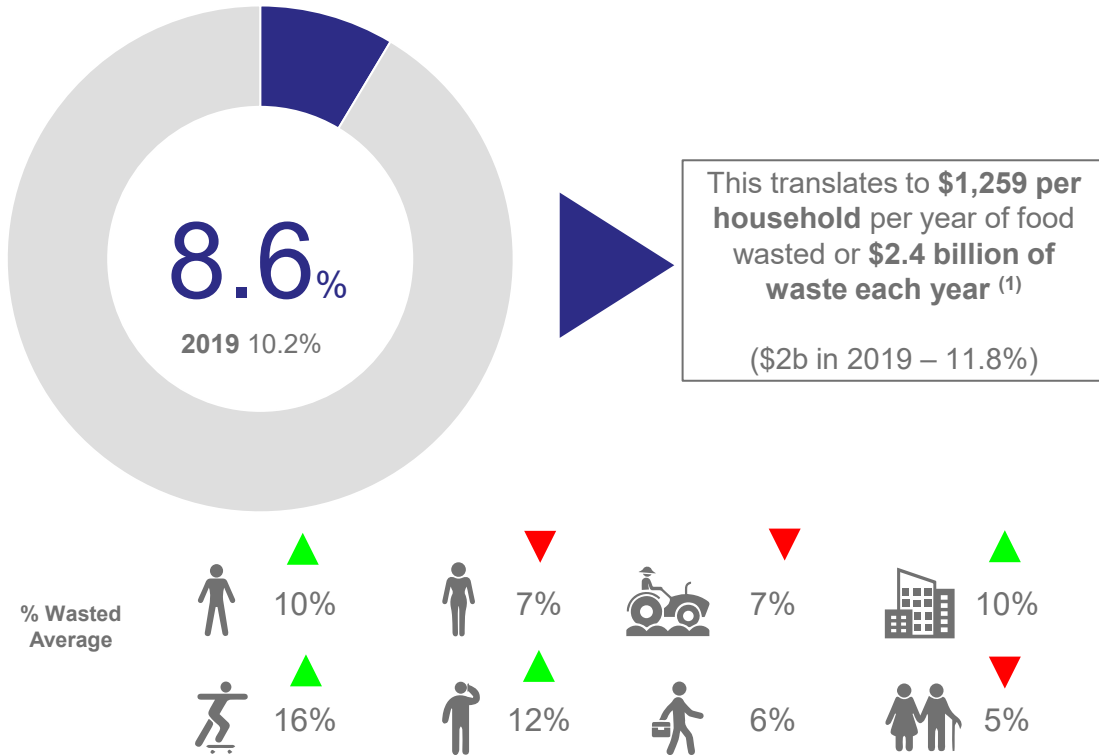
Landfills are seen to be the biggest impact on food waste along with pollution and contribution to greenhouse gases

However more New Zealanders are **taking steps to reduce food waste** – composting and growing your own fruit and veggies see the strongest uplift in 2021

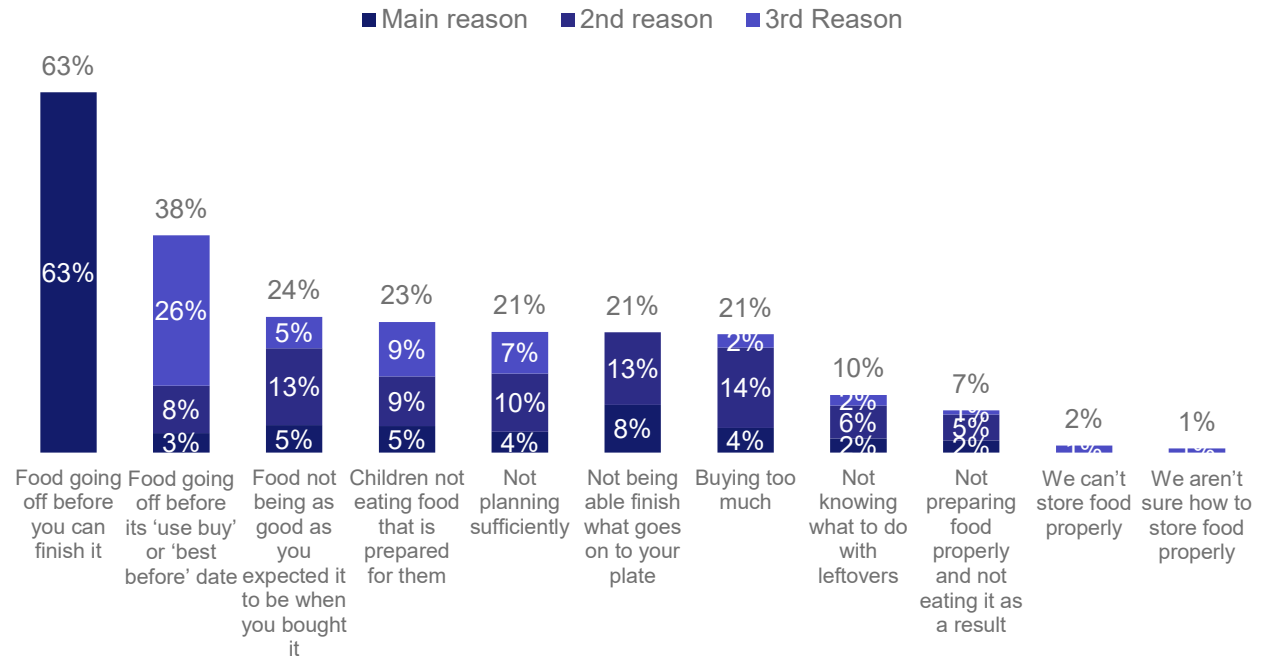


Positively the estimated proportion of food waste has declined in 2021 to below ten percent – with food going off too quickly still the key reason for waste

Estimated percentage of food waste (% of household spend)



Key reasons for wasted food

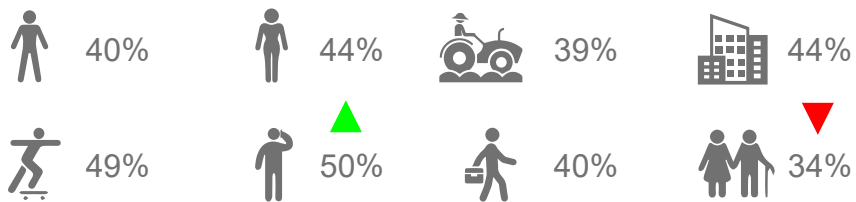
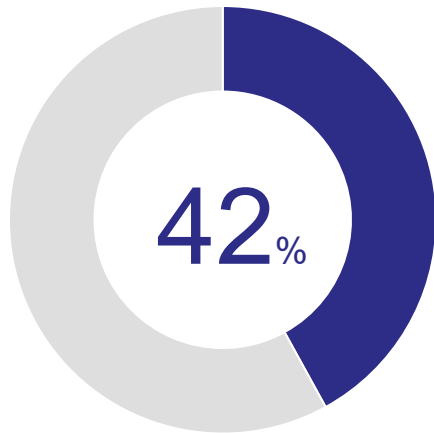


Base n=1,502
Based on 1.890 million New Zealand households (Stats New Zealand)

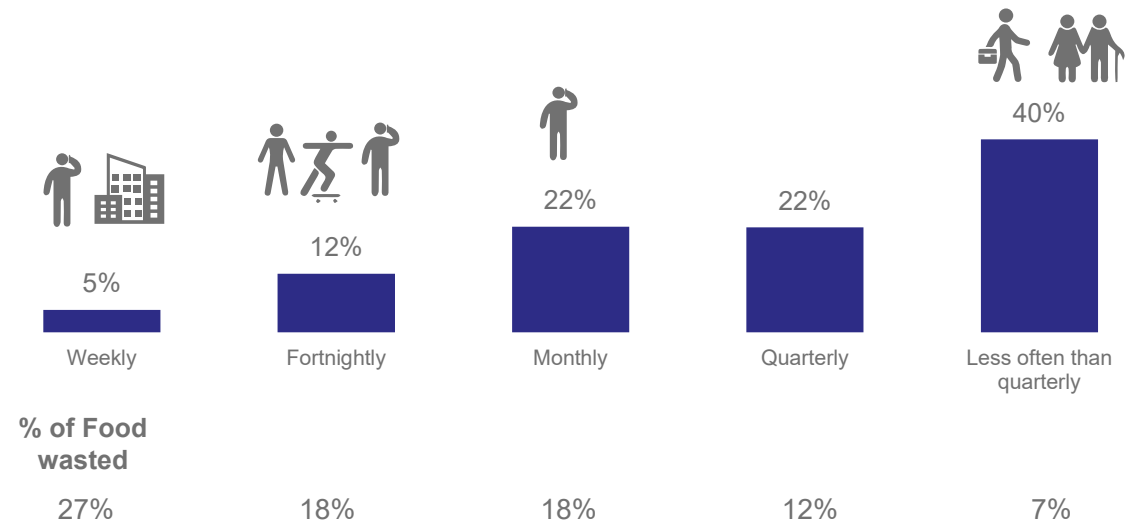
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Just under half of New Zealanders have thrown away unopened or untried food – with Generation Y and urban dwellers most likely to do so more frequently

Proportion of New Zealanders who have purchased food that you ended up throwing away without having tried or eaten it in the last 12 months



Frequency of throwing away food (amongst those who have done it)

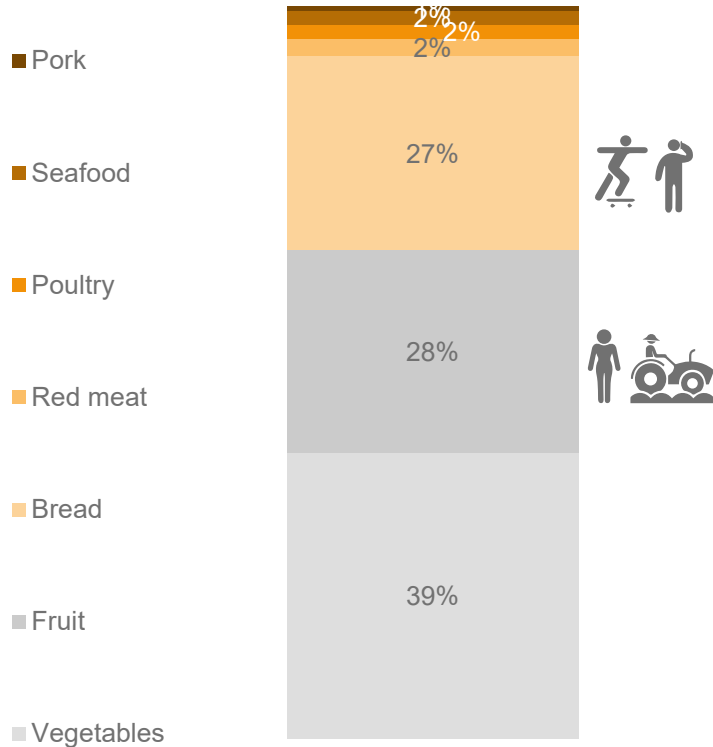


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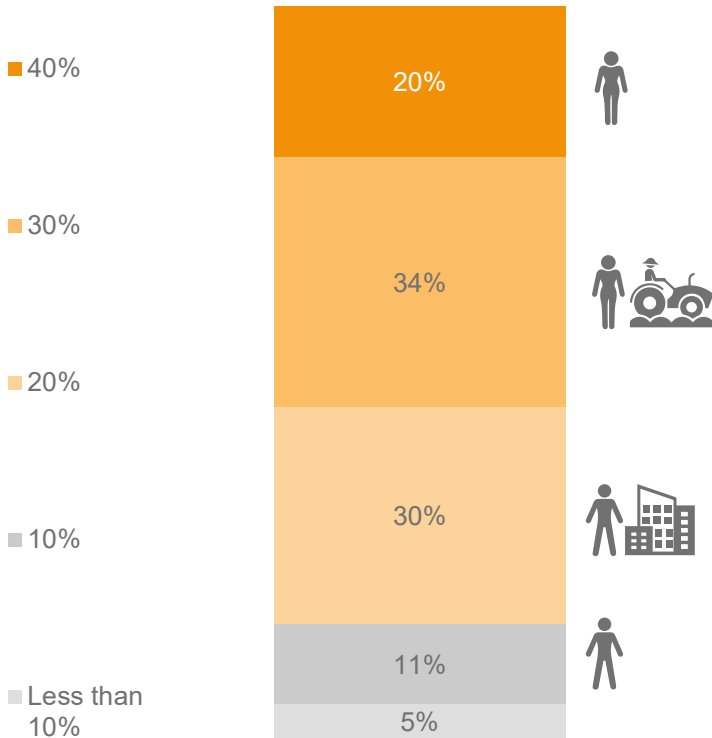
Base n=1502

Vegetables and fruit are most likely to have been wasted – whilst more than half of New Zealanders believe at least 30% of food is wasted as part of the production cycle

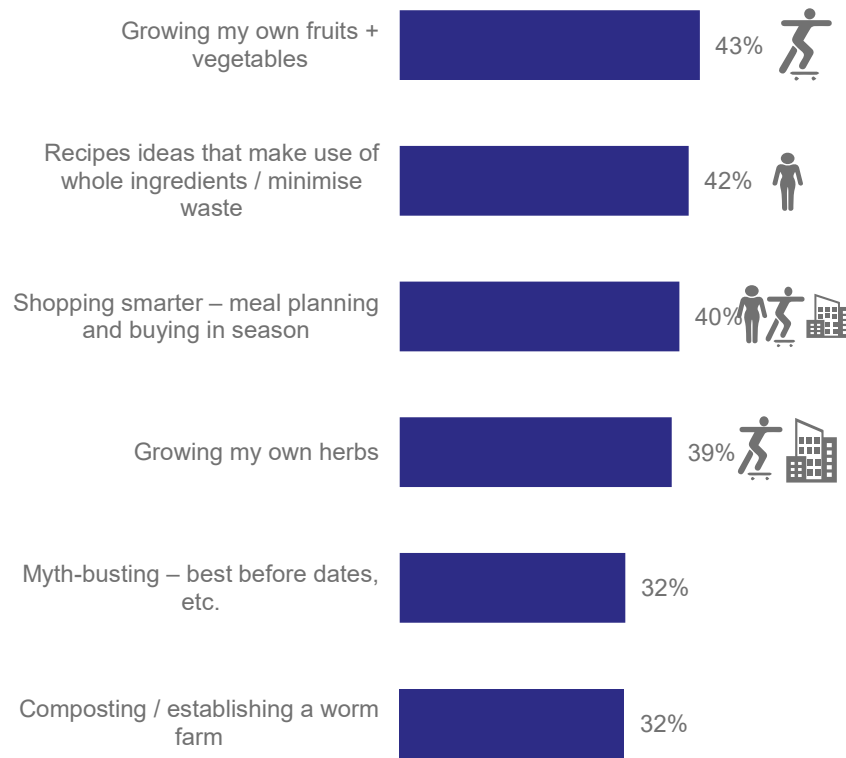
Foods wasted the most



Expected proportion of all food in New Zealand that goes to waste or lost in production cycle



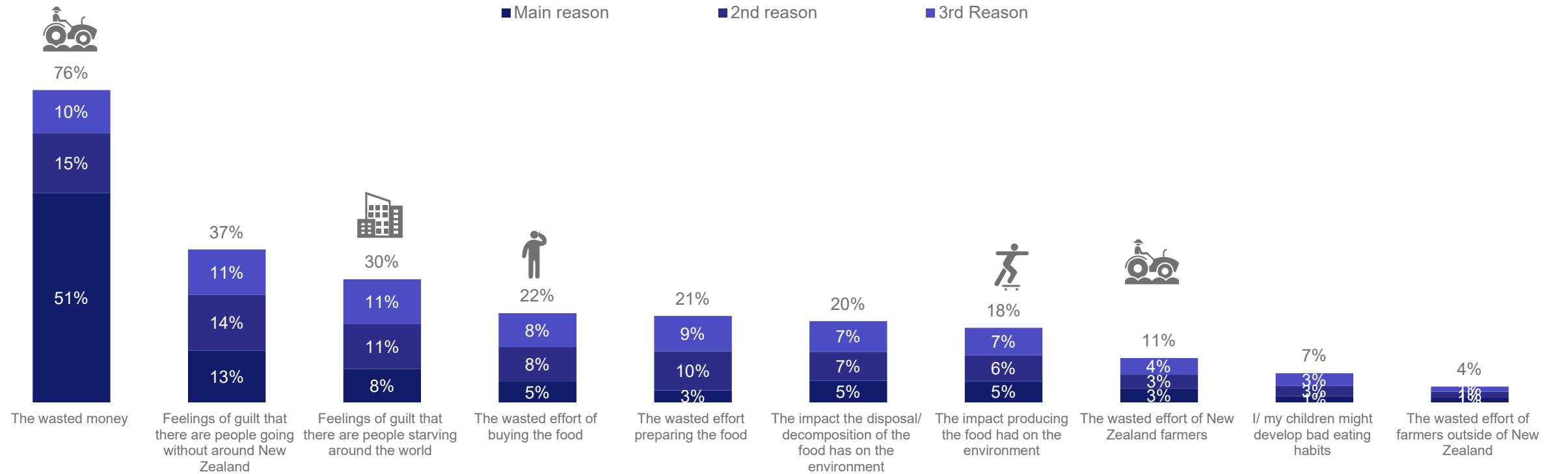
Interest in information to reduce food waste



Base n=1502

New Zealanders are most concerned about the wasted money as a result of food waste – ahead of guilt around wasted food potentially being used to help those without enough food

Concerns around food waste

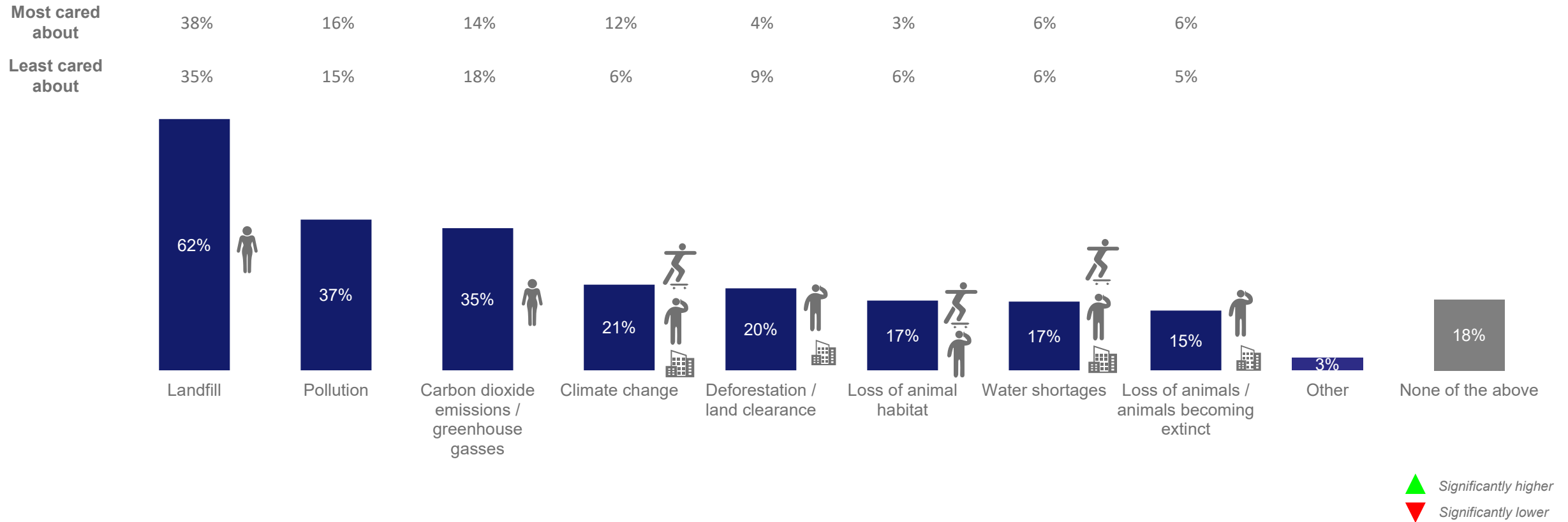


Base n=1502

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Landfill is seen as the biggest impact of wasted food – cited by nearly twice as many as pollution and gas emissions


















Perceived impacts of food waste





Base n=1502

Younger New Zealanders, particularly Gen Z, are most likely to be concerned about a larger number of food waste impacts – most notably climate change

Perceived impacts of food waste by age group

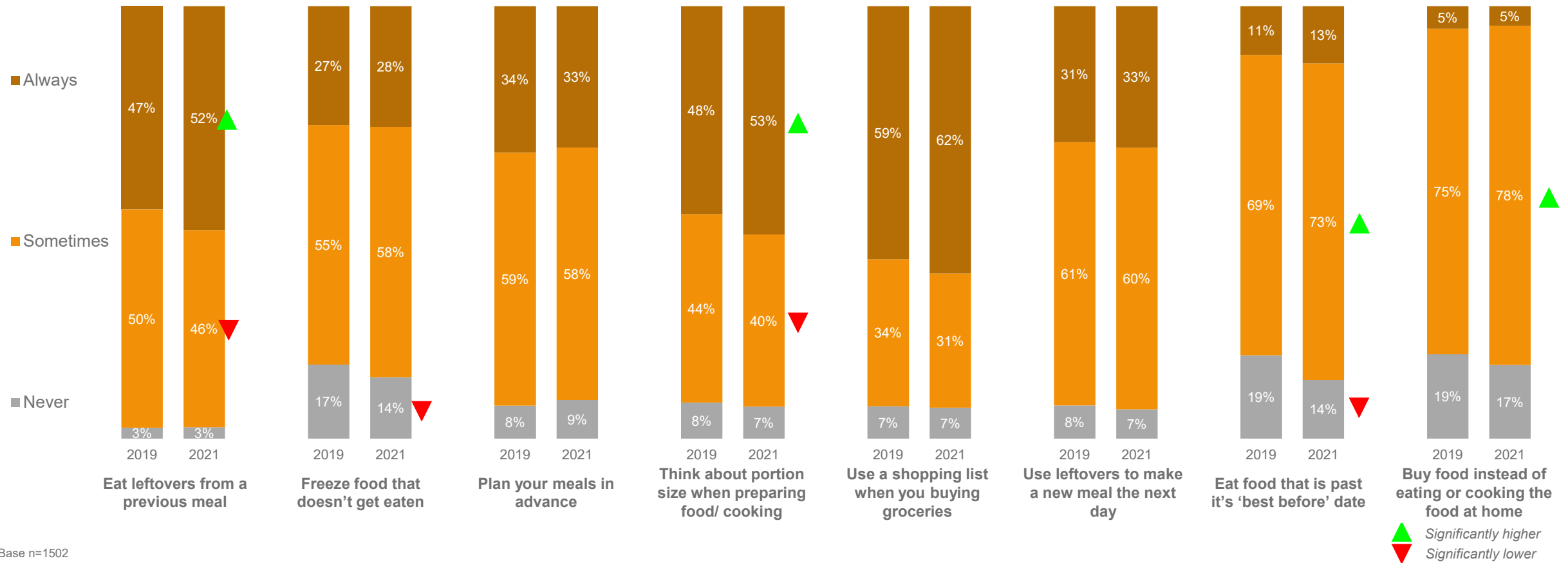
				
1 Landfill	66%	59%	61%	65%
2 Pollution	40%	39%	31%	40%
3 Carbon dioxide emissions / greenhouse gasses	36%	37%	30%	36%
4 Climate change	31% 	26% 	20%	20%
5 Deforestation / land clearance	27% 	22%	16% 	15% 
6 Loss of animal habitat	27% 	21%	16%	14% 
7 Water shortages	24% 	21% 	14%	13% 
8 Loss of animals / animals becoming extinct	24% 	17%	13% 	10% 

 Significantly higher
 Significantly lower

Base n=1,502

Positively New Zealanders are more likely in 2021 to eat leftovers from a meal, be more mindful of portion size, eat food that is past the best before dates – but also more likely to buy food instead of cooking it at home

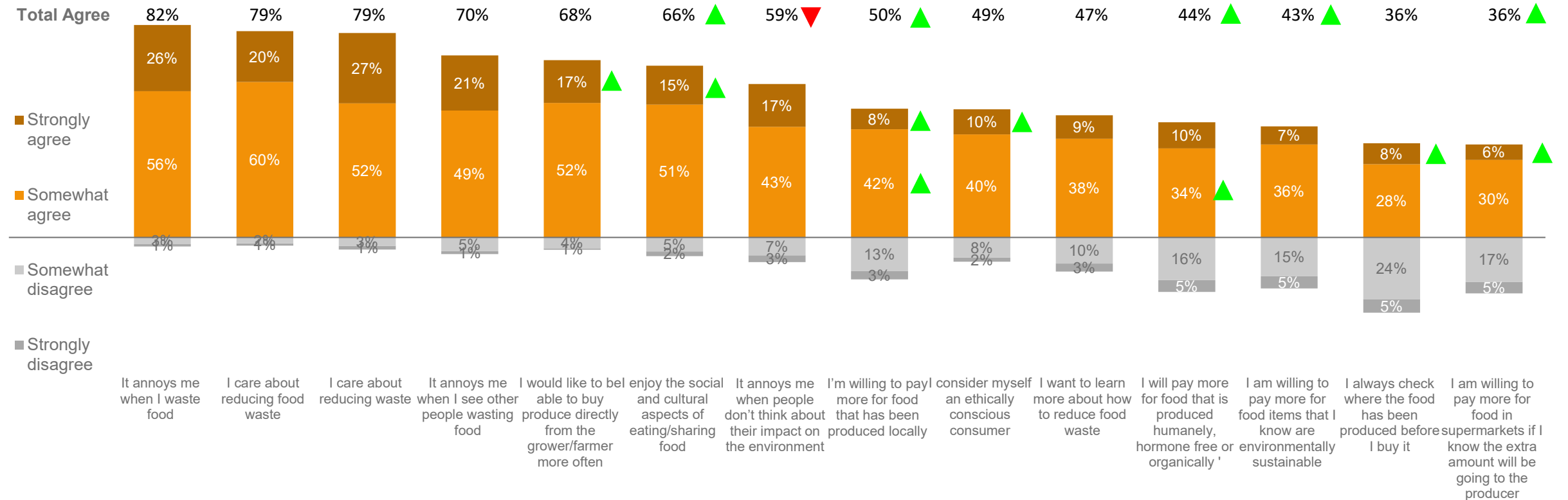
Household food behaviours



Base n=1502

Concern for food waste remains strong with locally produced, organic and environmentally sustainable foods are more likely to be paid more for

Food attitudes

























Base n=1502



▲ Significantly higher
▼ Significantly lower

Baby Boomers & Beyond are more likely to have favourable attitudes around waste prevention – whilst Gen Z New Zealanders are less likely to be annoyed by waste or care about reducing it

Food attitudes by age group

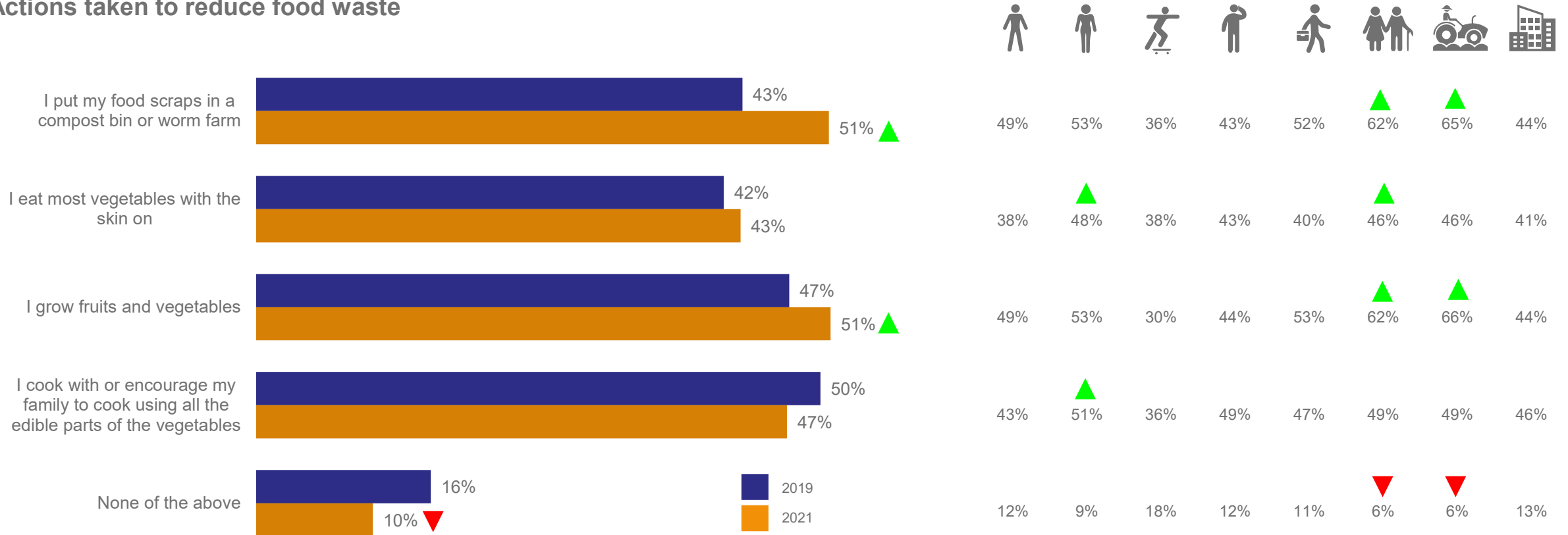
				
1	It annoys me when I waste food 68% 	It annoys me when I waste food 83%	It annoys me when I waste food 82%	It annoys me when I waste food 85% 
2	I care about reducing food waste 71% 	I care about reducing food waste 79%	I care about reducing food waste 79%	I care about reducing waste 83% 
3	I care about reducing waste 69% 	I care about reducing waste 77%	I care about reducing waste 79%	I care about reducing food waste 82% 
4	It annoys me when I see other people wasting food 66%	I enjoy the social and cultural aspects of eating/sharing food 71% 	I would like to be able to buy produce directly from the grower/farmer more often 69%	It annoys me when I see other people wasting food 74% 
5	I would like to be able to buy produce directly from the grower/farmer more often 56% 	I would like to be able to buy produce directly from the grower/farmer more often 71%	It annoys me when I see other people wasting food 67%	I would like to be able to buy produce directly from the grower/farmer more often 70%
6	I enjoy the social and cultural aspects of eating/sharing food 59%	It annoys me when I see other people wasting food 69%	I enjoy the social and cultural aspects of eating/sharing food 62%	I enjoy the social and cultural aspects of eating/sharing food 67%
7	It annoys me when people don't think about their impact on the environment 54%	It annoys me when people don't think about their impact on the environment 61%	It annoys me when people don't think about their impact on the environment 55%	It annoys me when people don't think about their impact on the environment 62%
8	I'm willing to pay more for food that has been produced locally 45%	I will pay more for food that is produced humanely, hormone free or organically 54% 	I'm willing to pay more for food that has been produced locally 46%	I consider myself an ethically conscious consumer 56% 
9	I consider myself an ethically conscious consumer 50%	I'm willing to pay more for food that has been produced locally 50%	I consider myself an ethically conscious consumer 42% 	I'm willing to pay more for food that has been produced locally 53%
10	I will pay more for food that is produced humanely, hormone free or organically 45%	I am willing to pay more for food items that I know are environmentally sustainable 48% 	I will pay more for food that is produced humanely, hormone free or organically 41%	I always check where the food has been produced before I buy it 42% 
11	I am willing to pay more for food items that I know are environmentally sustainable 46%	I consider myself an ethically conscious consumer 46%	I am willing to pay more for food items that I know are environmentally sustainable 39%	I am willing to pay more for food items that I know are environmentally sustainable 40%
12	I always check where the food has been produced before I buy it 32%	I am willing to pay more for food in supermarkets if I know the extra will be going to the producer 38%	I always check where the food has been produced before I buy it 35%	I will pay more for food that is produced humanely, hormone free or organically 39% 
13	I am willing to pay more for food in supermarkets if I know the extra will be going to the producer 44% 	I always check where the food has been produced before I buy it 32% 	I am willing to pay more for food in supermarkets if I know the extra will be going to the producer 31% 	I am willing to pay more for food in supermarkets if I know the extra will be going to the producer 35%

Base n=1,502

 Significantly higher
 Significantly lower

New Zealanders are more likely to be using compost / worm farms and growing their own fruits and vegetables in 2021

Actions taken to reduce food waste

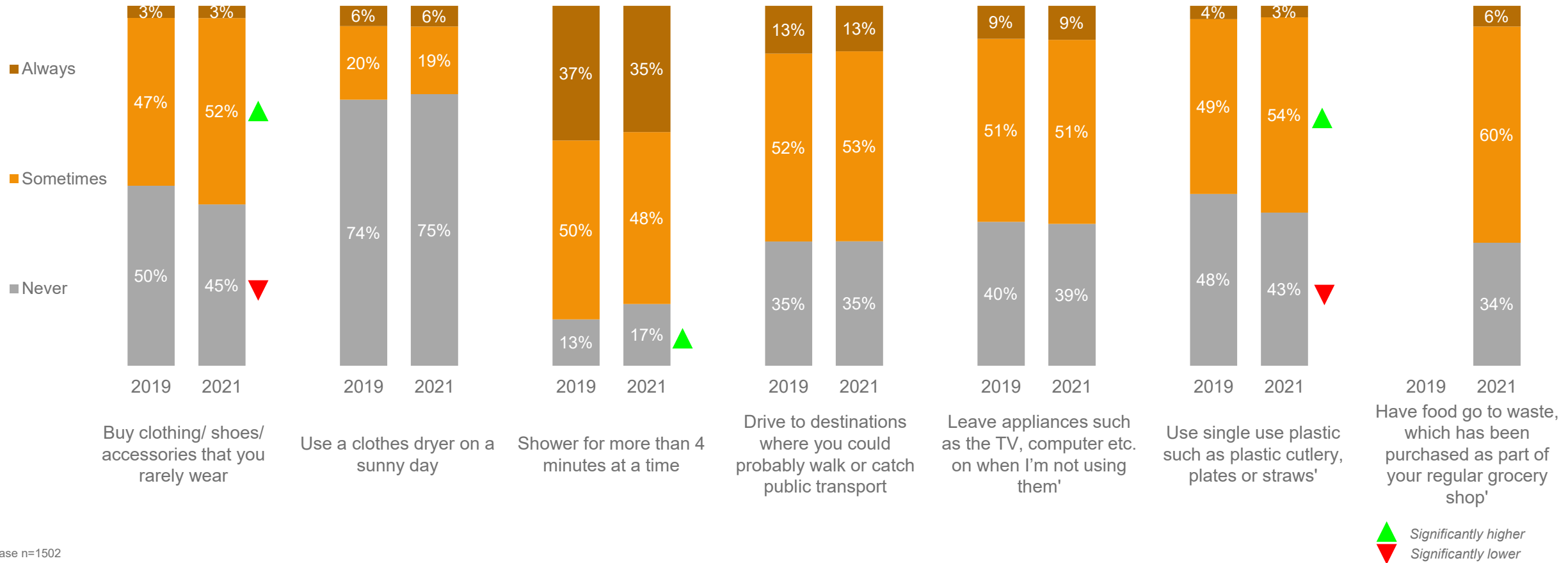


Base n=1502

▲ Significantly higher
▼ Significantly lower

However use of single use plastic and buying clothes / accessories rarely worn are more likely in 2021 – though showering for more than four minutes is likely to less likely to have been done

Frequency of wasteful behaviours



Base n=1502

5
How are New Zealanders feeling financially after COVID-19?



Three quarters of Kiwis now believe they are **living within their means** and feel informed about money matters – and are more likely to be **thinking long term**

A third of New Zealanders **feel financially comfortable** - twice that seen in 2019

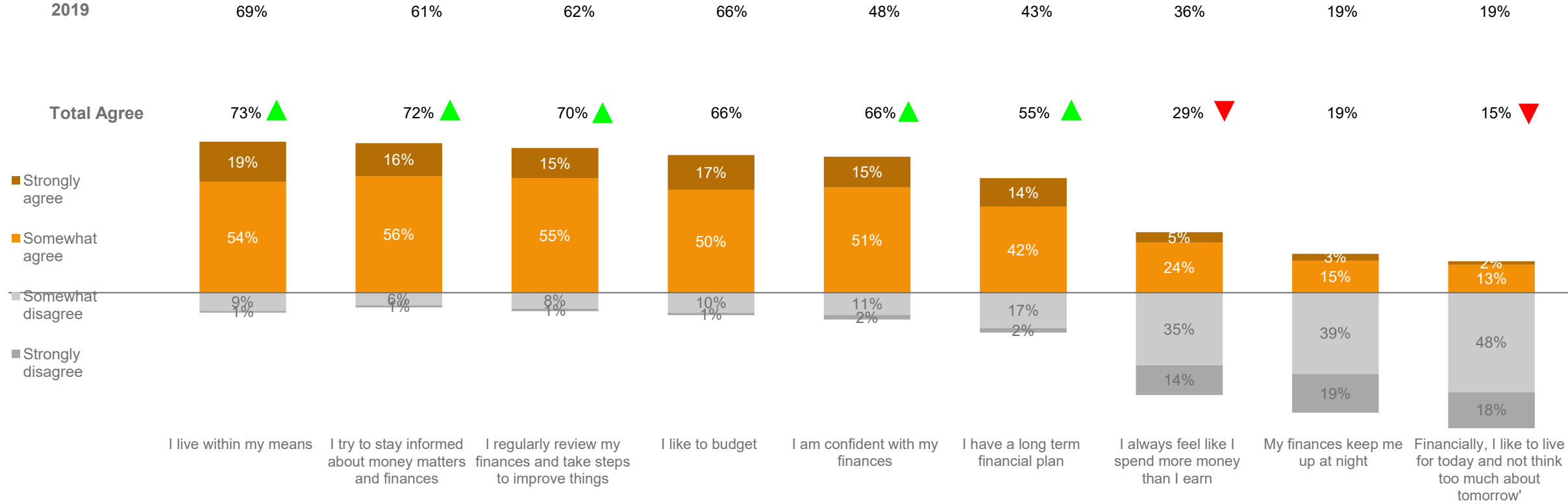
Kiwis are **more likely to be saving now** than in 2019 – with the average value of savings / investments and amount saved on average higher

Savings are less likely to be for holidays or debt in 2021 – whilst New Zealanders also using a more **diverse range of savings options** and financial **sources**



New Zealanders are more financially savvy in 2021 seeing improvements in a number of financial attitudes since 2019

Attitudes to finance

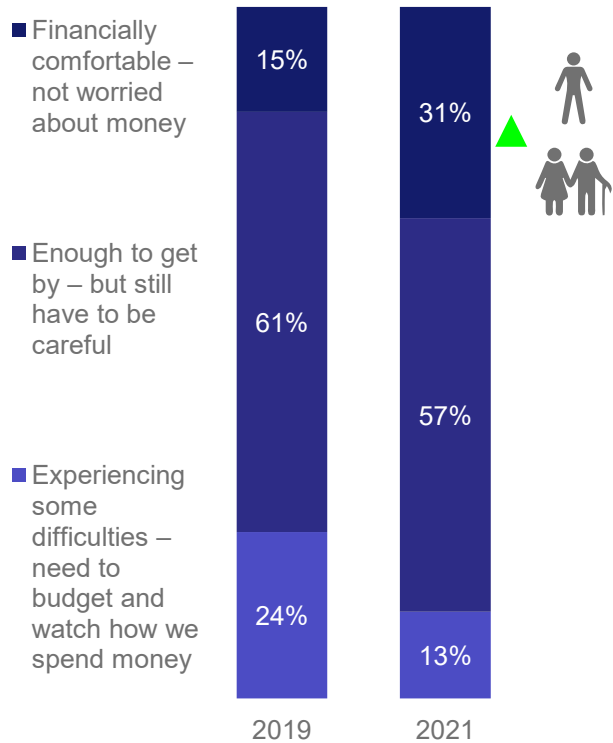


Base n=1502

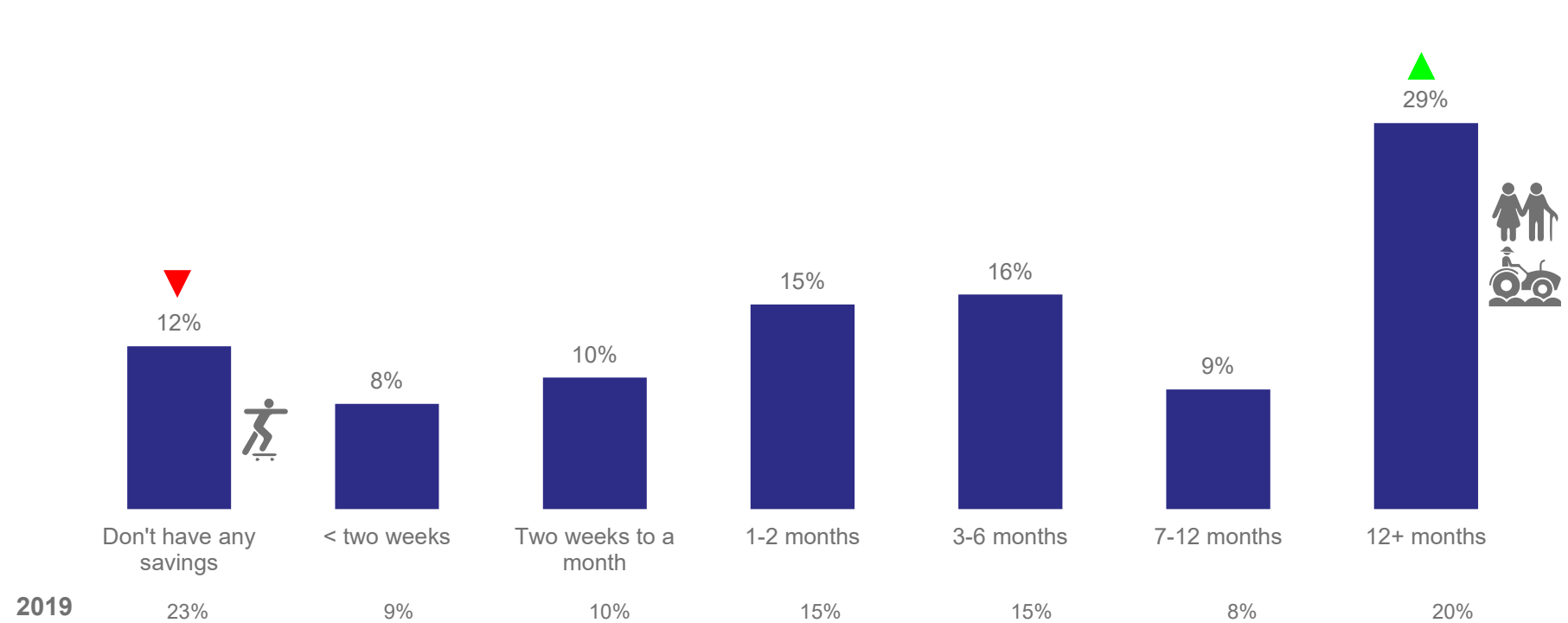
▲ Significantly higher
▼ Significantly lower

As a result more New Zealanders feel financially comfortable and expect they could live off their savings longer than in 2019

Current household financial situation



How long do you think you could live off existing savings (amongst those working)?

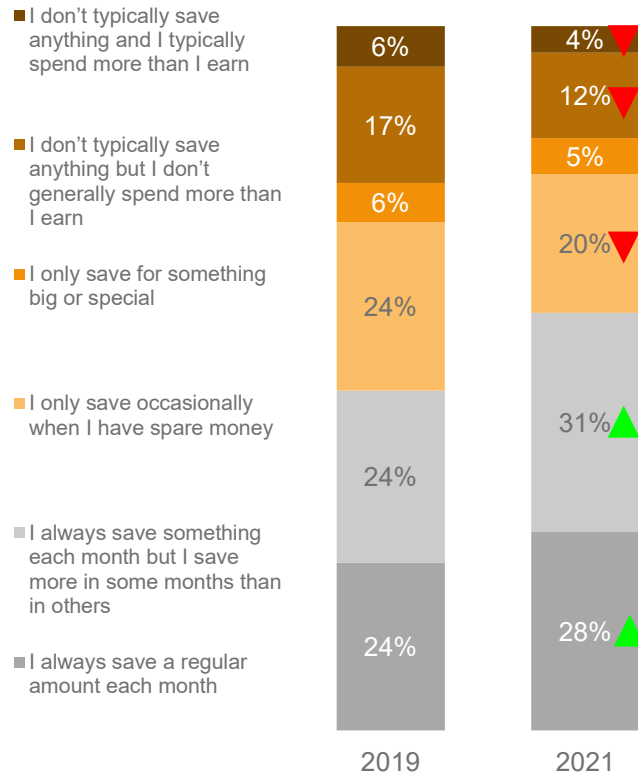


Base n=1502

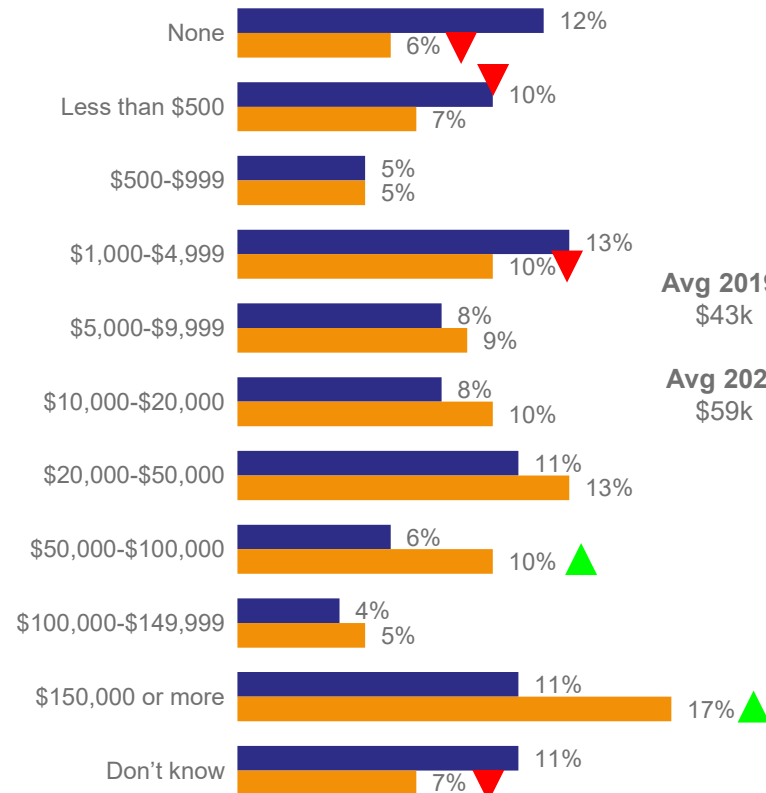
▲ Significantly higher
▼ Significantly lower

Savings behaviours have improved since 2019 also with the total amount saved / invested and the size of regular savings / investments also increasing

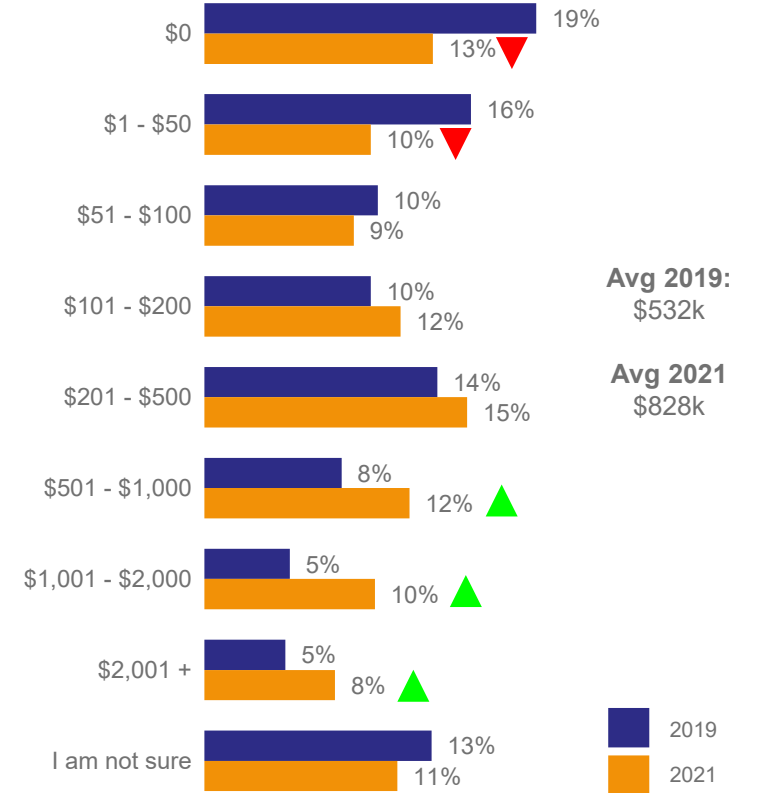
Savings and investment habits



Total savings and investments (Excl. KiwiSaver)



Amount saved / invested in a typical month

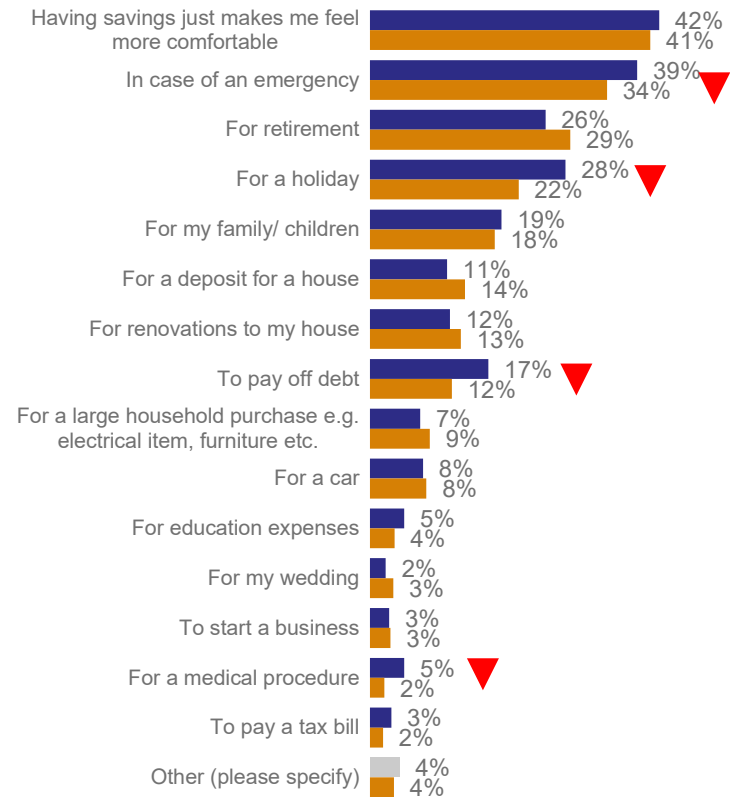


Base n=1502

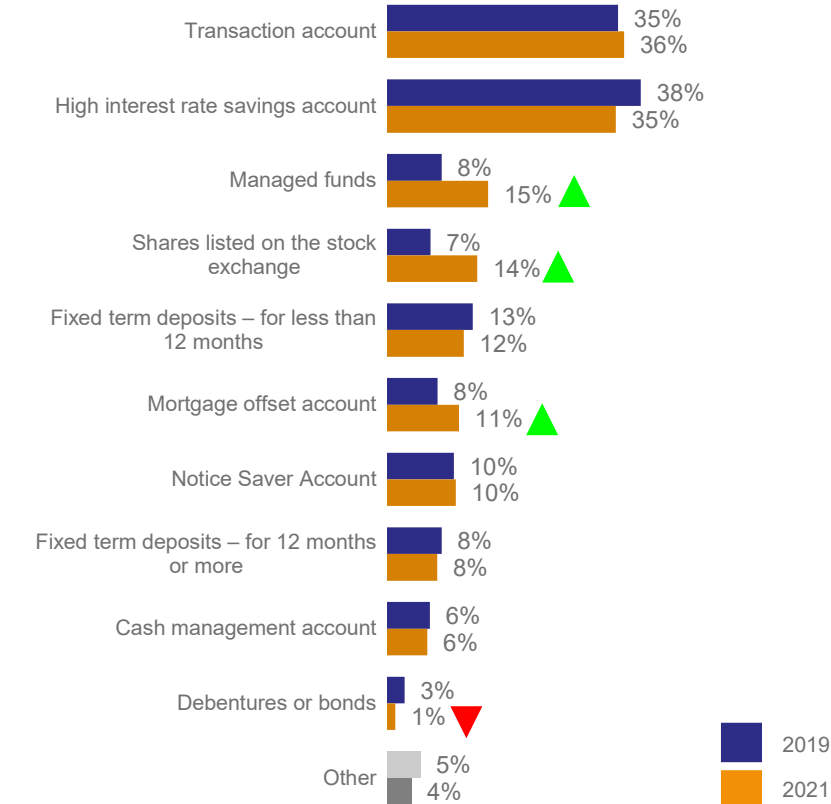
▲ Significantly higher
▼ Significantly lower

Unsurprisingly New Zealanders are less likely to be saving for a holiday – with savings more likely to be invested into a more diverse range of places

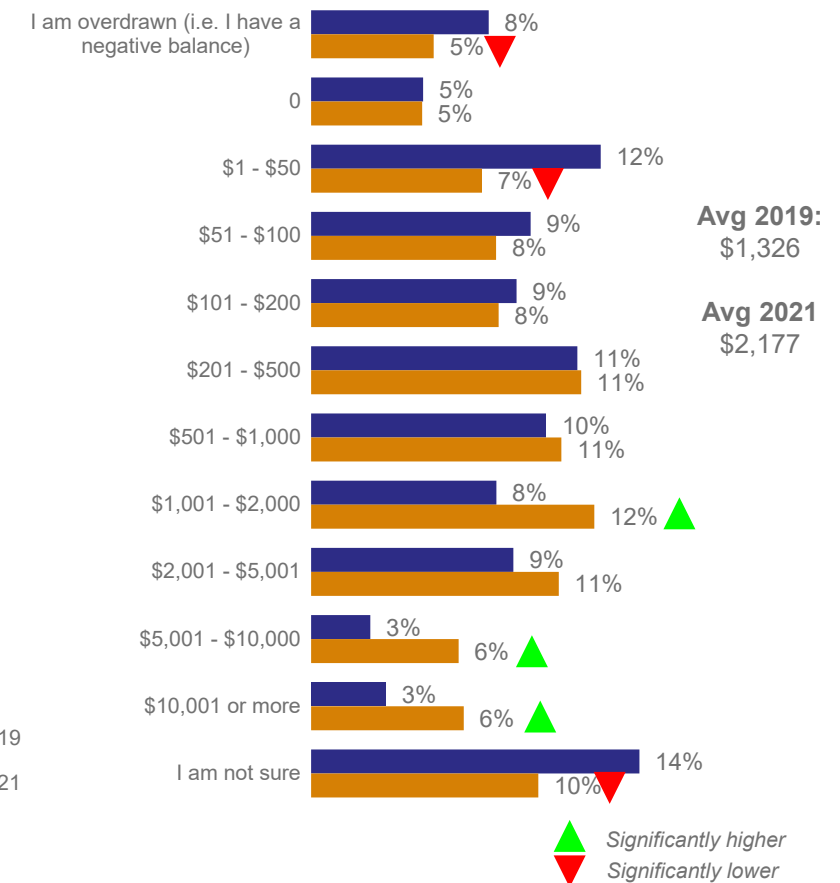
Key reasons for saving (amongst savers)



Savings accounts invested regular savings into (amongst savers)



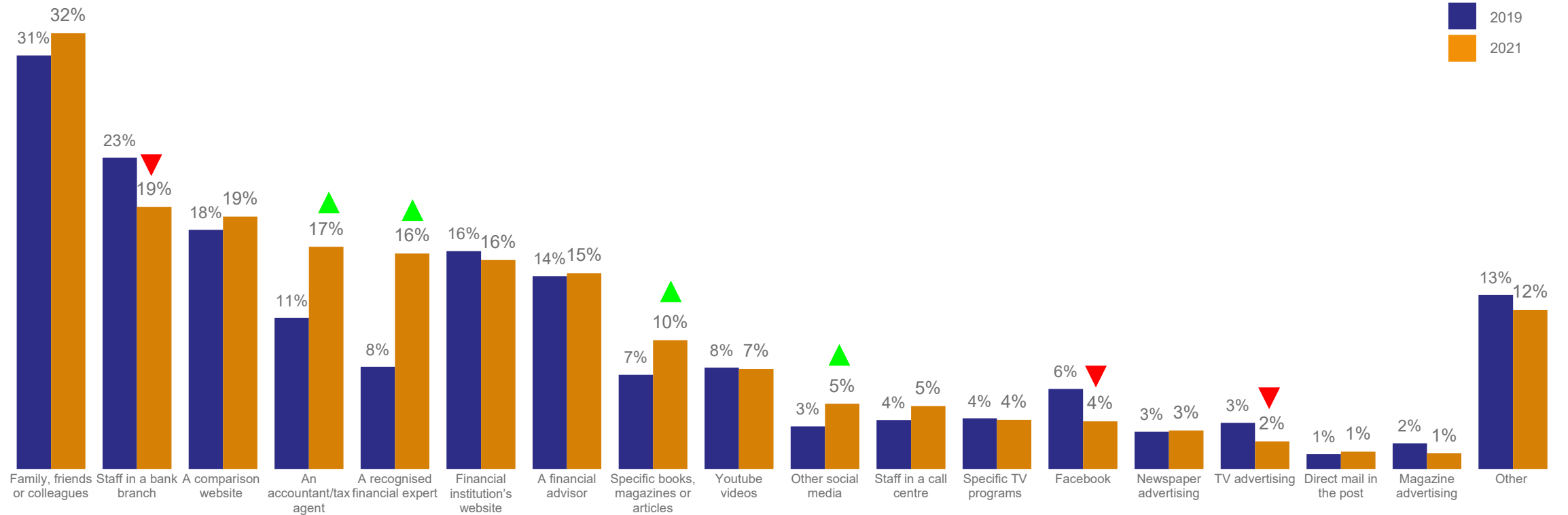
Average balance of everyday transaction account



Base n=1502

Whilst friends or family remain the main source used, New Zealanders are more likely to have used accountants or financial experts whilst being less likely to utilise bank staff

Use of financial advice sources – last 12 months



Base n=1502

▲ Significantly higher
▼ Significantly lower