

JUNE 2020

F O L K L

POTATOES NEW ZEALAND.

Consumer Research

FOLKL: PROPRIETARY AND CONFIDENTIAL



METHODOLOGY.

Research Methodology.

RESEARCH FINDINGS.

Fresh Potatoes.

Frozen Potato Products.

Takeaway Potato Products.

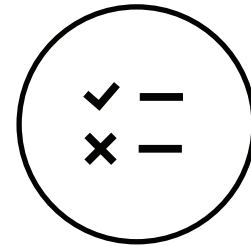
Potato Chips (Crisps).

INSIGHT APPLICATIONS.

Marketing.

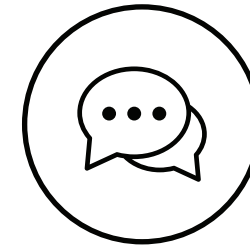
METHODOLOGY.

Research Methodology.



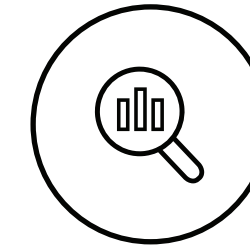
Survey

National survey of New Zealand potato consumers aged 18+. The survey received 957 responses, with a margin of error 3% at a 95% Confidence Level.



Interviews

In-depth interviews were conducted with 20 New Zealand potato consumers from around the country. Participants were equally split in terms of gender, and were a mix of ethnicities, socio-economic, and geographical demographics intended to represent the sample base.



'Social Studies'

Proprietary digital and social media data drawn from FOLKL's Social Studies tool added an additional layer to key themes and insights.

This research explores New Zealand potato consumer trends, with particular focus on current attitudes and behaviours regarding purchasing and consumption. Analysis is segmented by the following categories; fresh potatoes, frozen potato products, takeaway potato products, and potato chips (crisps).

RESEARCH FINDINGS.



Fresh Potatoes.





People favour fresh, all-purpose potatoes that they can rely on.

When it comes to potato preference, focus is on usability over and above varietal differences. People want a potato that is versatile and able to be cooked in a range of different ways.

Agria is the most well-known variety and has built its reputation off the back of its reliability and versatility.



Awareness issues surround varieties and brands.

Aside from Agria, and to a lesser extent Perla, Nadine and Jersey Benne, people are unaware of the range of different varieties and brands of potatoes that are on the market in New Zealand.

There is a tendency for varieties to be lumped into, or circumvented by, the use of the term 'new season' as a leading descriptor.

Key Findings.



Personal ‘quality control’ measures.

Purchasing potatoes is not as straightforward as it sounds. People tend to have a personal criteria for selecting both loose and bagged potatoes at the point of purchase. Being able to sight the potato is crucial, even when bagged.

People tend to favour potatoes that have fewer imperfections (e.g. eyes, bruises), and that are ‘medium’ sized, improving the cooking and peeling experience. Longevity is key and freshness is prioritised in respect of this. Dirt is also a factor and people tend to be evenly split as to whether this is appealing or unappealing. Google search data reflects intrigue in this area.



Potatoes bring the bulk, with roasting leading the way.

People consider potatoes as the ‘bulk’ of a wider meal. Whether they are roasted or mashed, they add a crucial textural component, and tend to be seen as a vessel for carrying additional flavours that the meal may bring.

The preferred method of cooking potatoes is to roast them, with people tending to have a ritualistic approach to roasting their potatoes. Older New Zealanders are more likely to boil their potatoes than younger, and recipes for ways of roasting potatoes are the most common potato related Google search.



The carbohydrate conundrum.

When it comes to nutritional value, potatoes are seen as a source of carbohydrate. This works both ways with people considering the potato as a source of energy and sustenance while also being wary of the perceived negative health associations of carbohydrate consumption.

Kūmara is considered to be a healthier and superior alternative nutritionally.

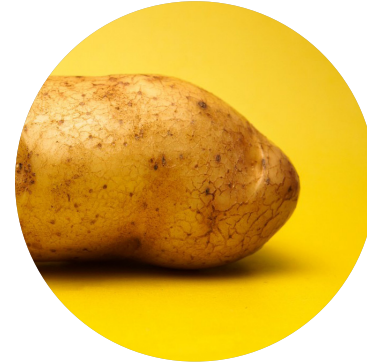
Key Findings.



Occasion is influential.

An occasion and/or preparation for a specific meal is influential in guiding potato purchase and in particular the purchasing of loose potatoes.

Christmas is prominent and people associate Jersey Benne potatoes with this occasion, Google search data also shows an increase in potato related search terms at this time of year.



Potatoes can afford to ‘step out from the dark’.

There is not enough education about potatoes in market, and people want to know more. Despite being much loved, potatoes exist on the periphery and people are largely unaware of the extent of their nutritional value and the distinct features of different varieties, such as flavour profiles and cooking attributes.

Where have you purchased potatoes from in the past three months?



10%
Meal Kit
Delivery
services



87%
Supermarket

- 6% Specialist Grocer (eg. Organic Supermarket)
- 5% I haven't purchased potatoes in the past three months
- 3% Dairy
- 2% Came with Foodbank Packs
- 2% Roadside Stall
- 2% Other (Please Specify)
 - Farmers market
 - Vegetable delivery service

12%

of the 30-39 age group had purchased from a specialist grocery store, twice as high as the next closest group (18-29).

41%

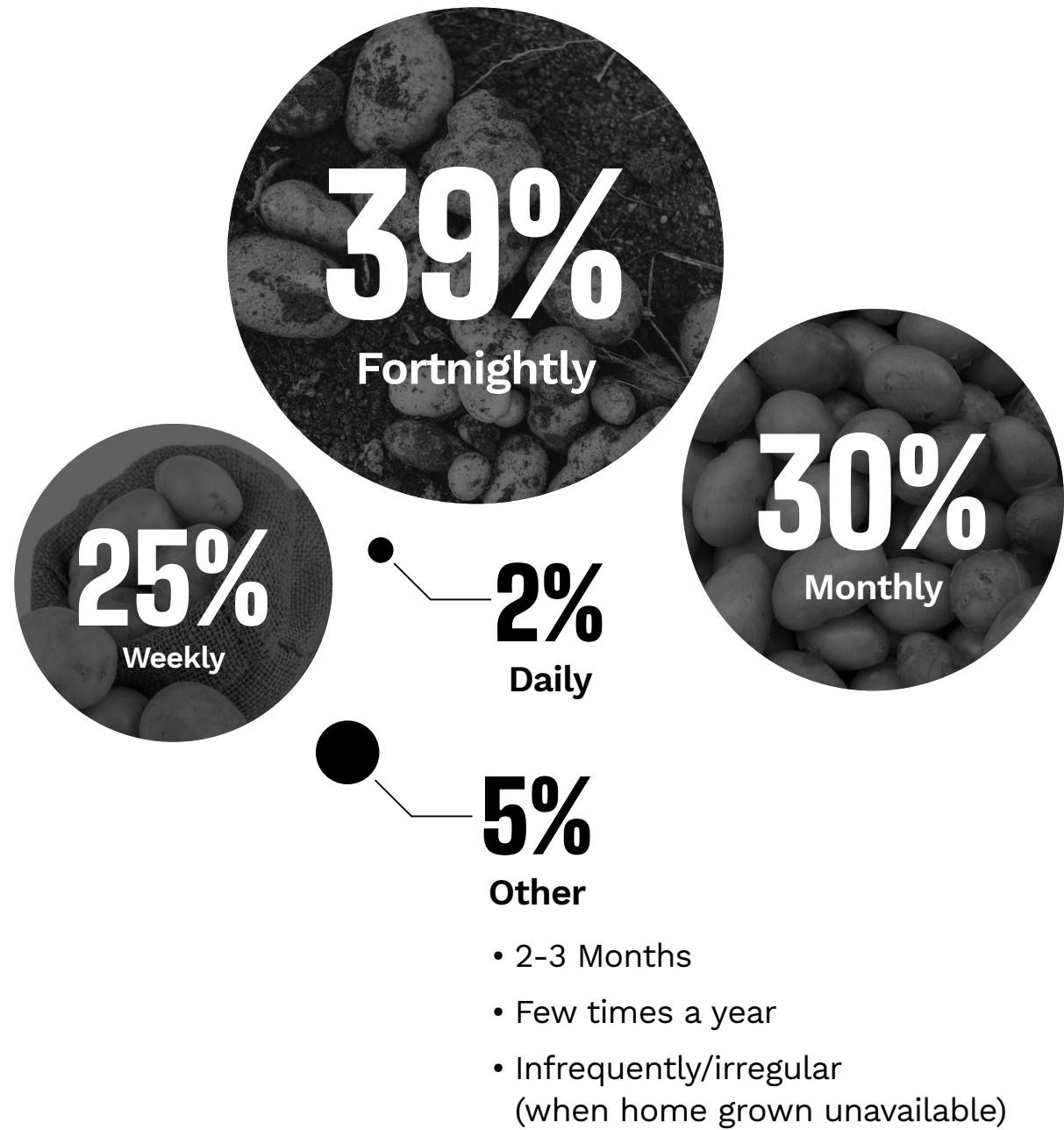
of respondents from Auckland had purchased from Fruit & Vegetable Shop/Market Garden, compared to 25% in Wellington.

200%

Those with higher income (\$100k combined household income) were 200% more likely to shop at a specialist grocery store, and 25% more likely to shop at a Fruit & Vegetable Shop/Market Garden.

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How often do you purchase potatoes?



34% v 19%

Those aged 30-39 are more likely to purchase potatoes weekly (34%), compared to those aged 60+ (19%).

There are very little other differences across demographic groups when it came to purchasing frequency.

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What is your preferred way of purchasing fresh potatoes?



19%

The 18-29 age group were more likely to purchase a smaller format of potatoes (19%) compared to those 60+ (10%).

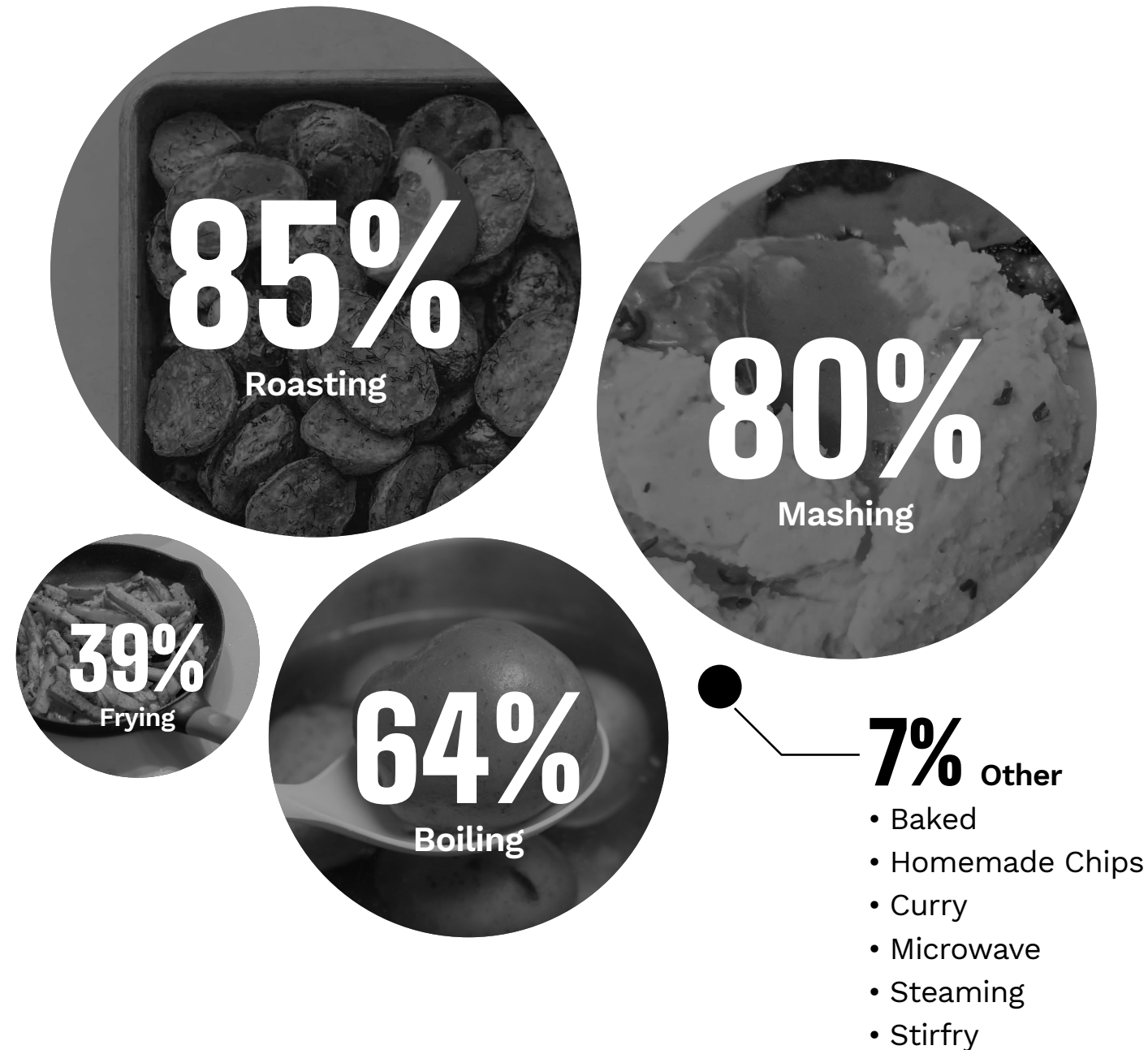
41%

Those in Auckland purchase potatoes as loose produce more than any other format (41%), and are 40% more likely to purchase loose potatoes than any other region.



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Which of the following ways do you use potatoes?



80%

of respondents aged 60+ report boiling, versus 50% of those aged 30-39.

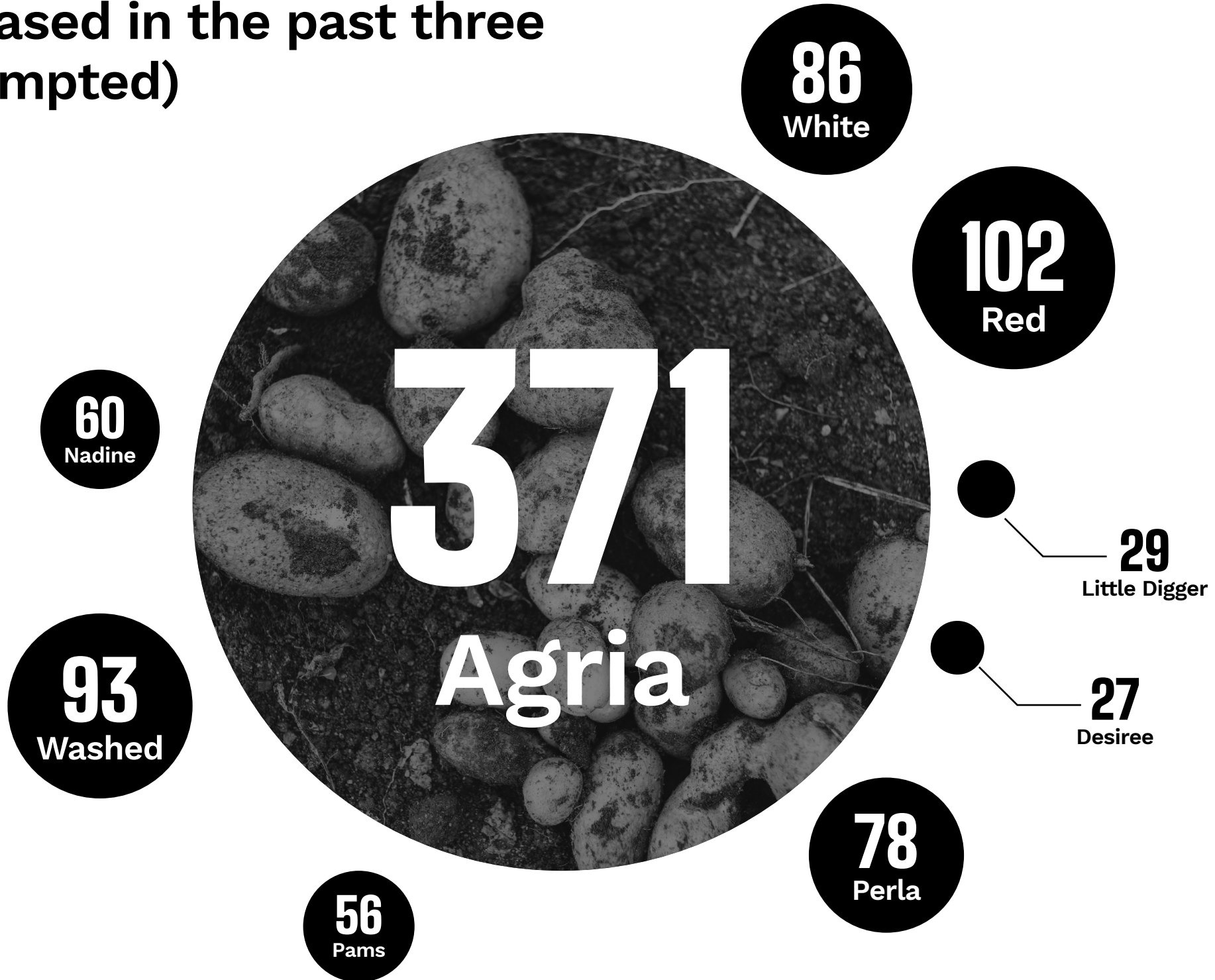
45% v 33%

45% of males fry potatoes compared with 33% of females.



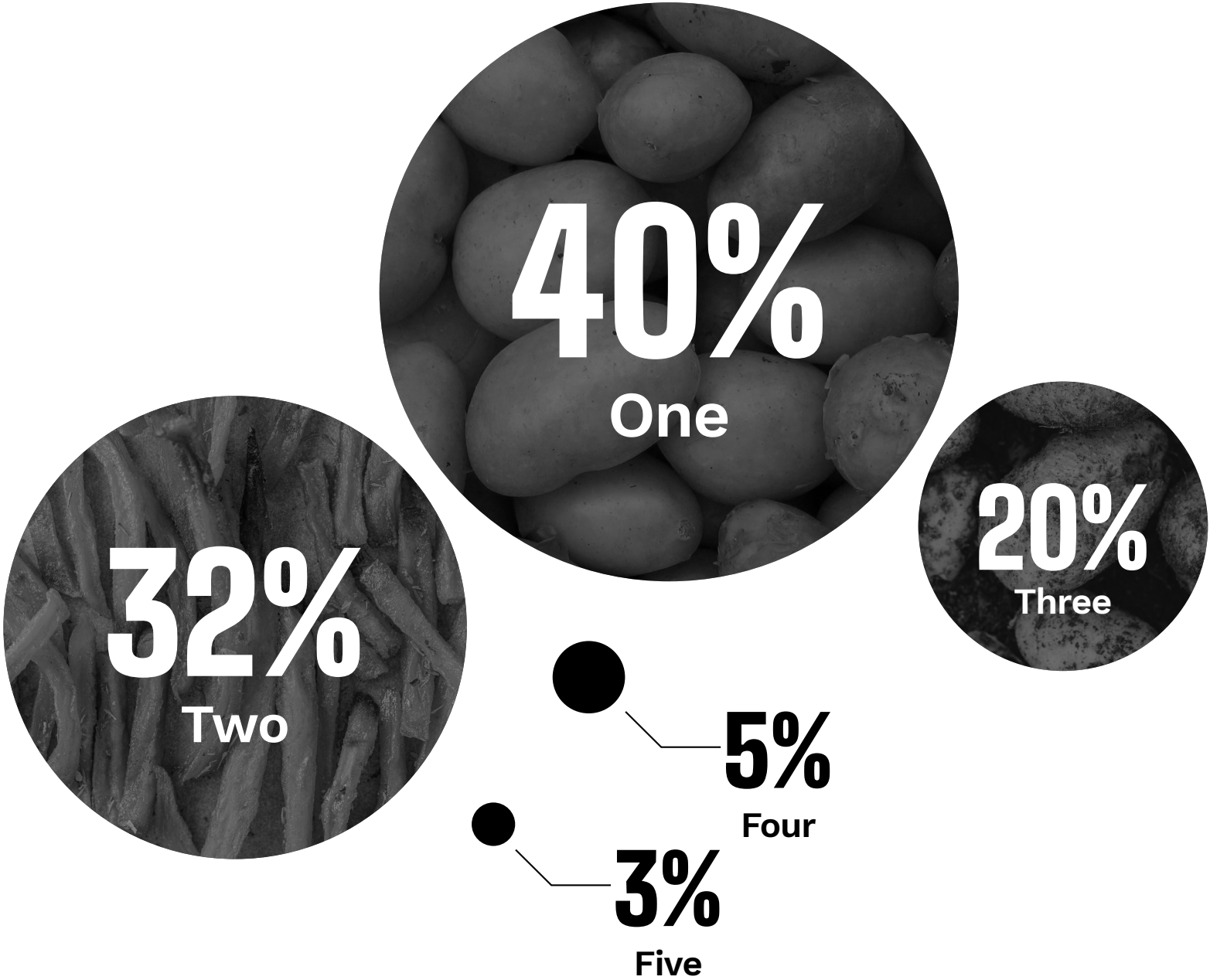
Roasting potatoes was the most popular method, with very similar results over all age groups.

Which potato varieties and/or brands have you purchased in the past three months? (Unprompted)



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Which potato varieties and/or brands have you purchased in the past three months? (Number per respondent)



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Sound bites.

F O L K L

“Just performance and keeping quality. So Agrias are just good for roasting and mashing and they keep well. The Summer Delight is really good dual purpose for anything you want to do with them and they’re always usually a good sized potato as well and they’re generally a bit cleaner when you’re trying to clean them up. They’re not covered in so much soil like Agria can be.”

“If I see the new season potatoes loose and they look really good, I will stand there and brush off all the dirt and put them in my bag, so I don’t have to pay for the dirt, but it doesn’t really bother me because I know it’ll be nice but as long as they’re hard and not soft or they’re not sprouting or not green I will buy them. Also, if they’re not funny shaped, if it’s too hard to peel.”

“Agria is always versatile and I like those Perlas or other small ones for boiling.”

“I will turn over a few bags to see if they’re a bit funny looking and if so, I’ll get them loose and I’ll pick out the bottom ones because I know they’re fresher, it’s just my background that I know what I’m looking for.”

“Gees, I never really look that close. Probably the size, probably medium potato and then we normally buy those ones that have dirt.”

“Usually we just stick to Agria because it’s a good all rounder. Because we don’t really know what we’re going to do with them when we buy them, so it’s good just to get Agria because they’re good for roasting, mashing, a good all-rounder.”

“I normally look at them first. If they’re bagged up they’re normally 5kg bags and so I look behind the bag and see them and if I don’t like them I’ll pick them randomly, loose.”

“The consistency, you can crisp them up and they’re still soft in the middle. So they’re crispy on the outside but soft and creamy on the inside.”

“That they don’t have dings or bruises on them, no growths, they don’t look funky. I don’t really care about the washed potatoes, that doesn’t bother me, they just have to look uniform and smooth with no funky things on them.”

“Probably used to bulk it out a bit more, I guess because they’ve always been considered quite carby maybe. Just a really good base. Good filler. I’m of Irish ancestry and grew up with potatoes as a staple in our house so they still are. But I cook them a lot nicer than what my mother did.”

“Carb and bulk. You always feel satisfied after a meal with potatoes.”

“I would love to learn more about it. I think you could really enhance your cooking if you knew more about what potatoes to get. I knew there were a lot of varieties but didn’t know there were 100 so there’s obviously some real opportunities out there.”

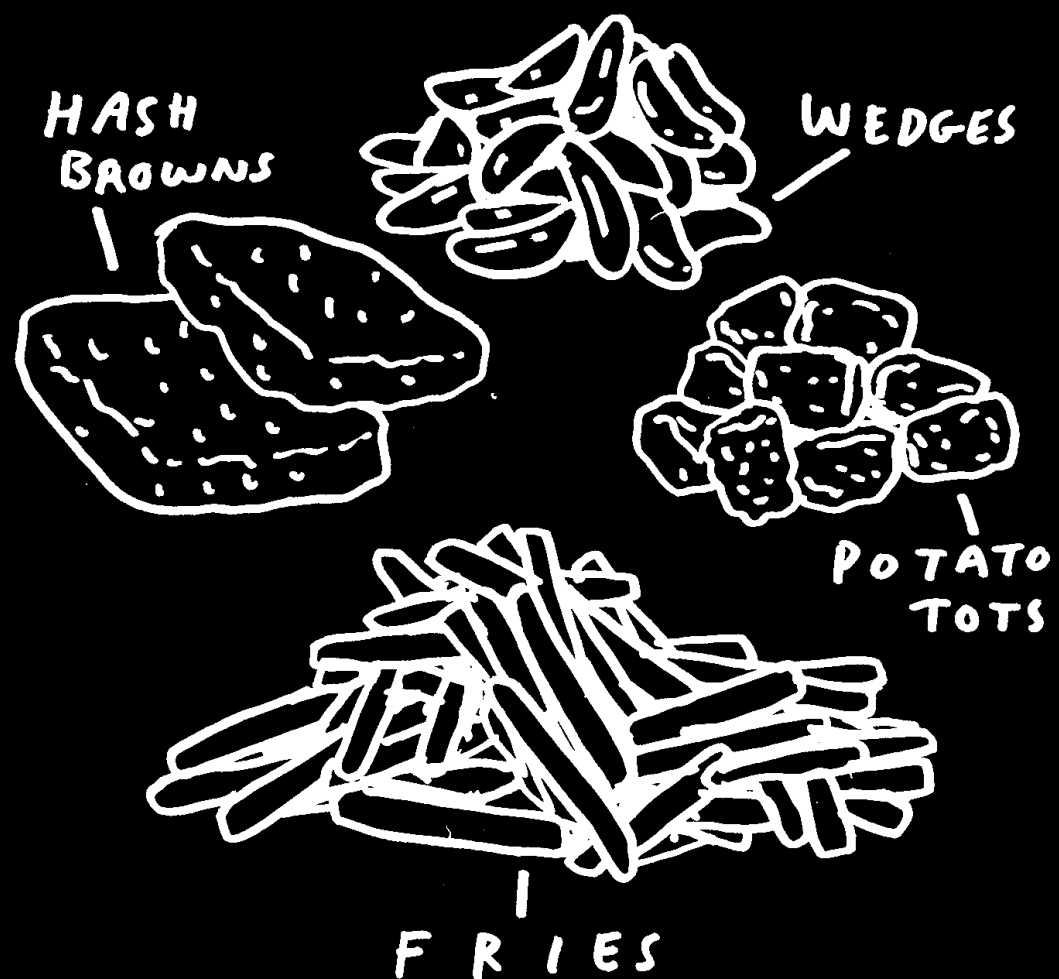
“My other half has a lot more knowledge than me about those things. Yes I would love to be able to see more big print information, something really simple like ‘I roast better’ or ‘I am sweet’ or ‘I boil best’, that would be a big advantage for someone like me who’s a bit of an ignorant sort of a fellow, or not ignorant but the guy that’s in a rush. It’s the price, I twist it and turn it, it looks all good, gets the tick, it’s in the basket and I’m off, next. I would love that information and I think that would draw me, like coming back to the fish and chip shop, I’d get the same, ‘that was great last time’”

“There’s a lot of information out there about ‘they’re carbs, they’re not good for you etc’ and I guess that would my viewpoint is how they can actually try and, because you know potatoes do have some nutritional benefits to them so how do you try and promote that, say leaving the skin on the potatoes etc. They are a natural food so they can’t be all bad, how do you put that positive spin on them, I think they’ve got a bad rep in the last couple of year with everyone being so anti-carbs so yeah try and show them in a good light or something.”

“I’ve heard and been told promotionally that kūmara has a lower GI than potatoes, or is that other way around but kūmara has the longer lasting energy effects than potatoes do.”

“So that I’m not just eating roast potatoes or mashed potatoes. I’d like to eat boiled, nice boiled potatoes that are not necessarily Perlas, any other variety that maybe could add some parsley and olive oil or a bit of butter to. But nice boiled potatoes as opposed to Agria boiled potatoes.”

Frozen Potato Products.



Key Findings.



It's all about convenience.

Even when people know they can cook the fresh equivalent better themselves frozen potato products are still turned to for convenience.

They may be purchased less frequently but their presence in the freezer is highly valued, particularly in those moments when friends and family (with young children) make an unexpected visit and a meal needs to be produced quickly.

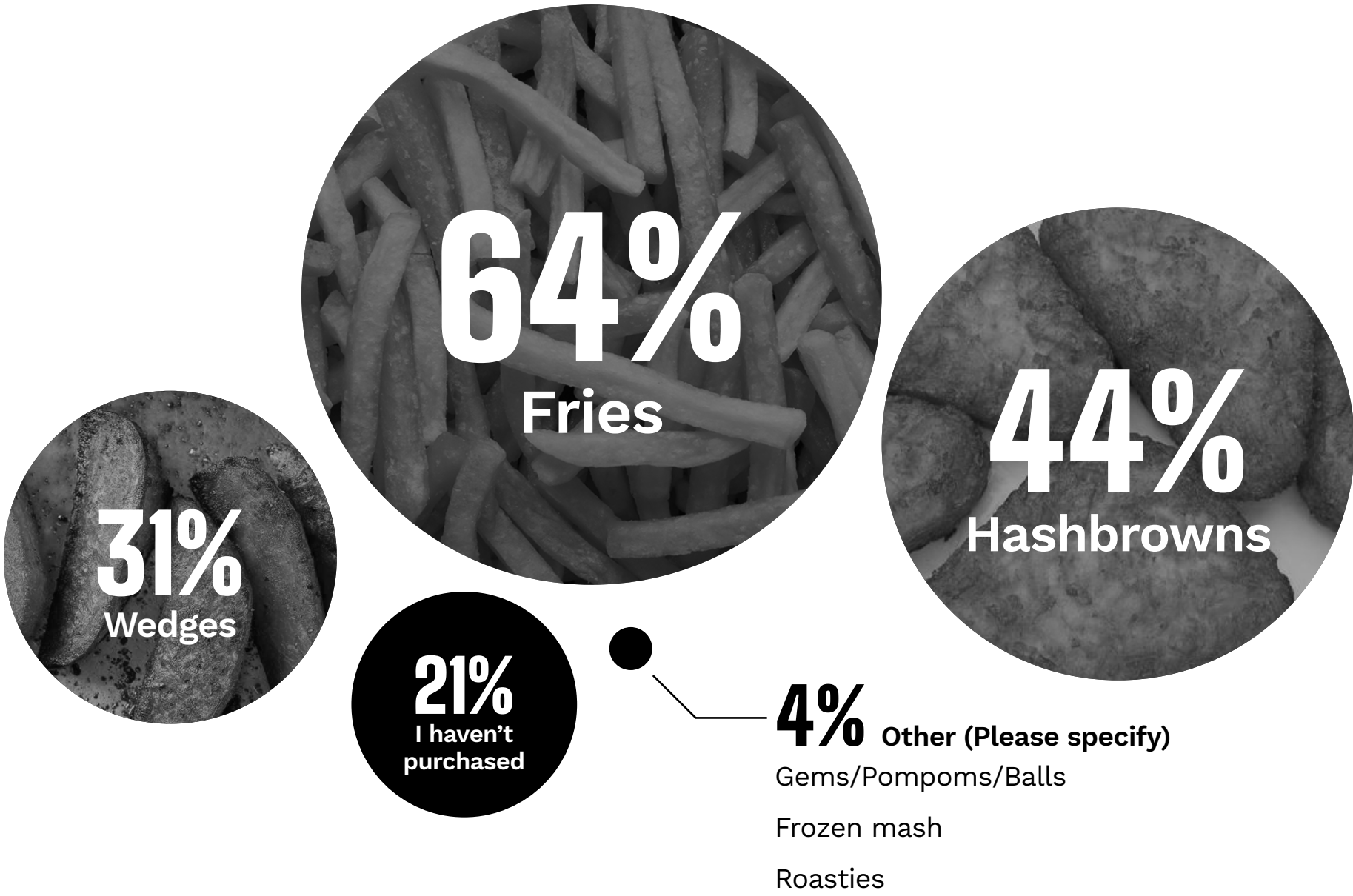


Health concerns are on the radar.

Caught between household convenience and takeaway imitation, frozen potato products tend to raise health concerns.

People prefer thicker cut frozen potato products to thinner alternatives and are wary on the perceived benefits of eating natural potatoes versus processed.

Which of the following frozen potato products have you purchased in the past three months?



60+

Those respondents aged 60+ were the least likely to purchase frozen potato products (34% hadn't purchased). The younger the age group, the more likely they would purchase frozen potato products.

18-39

Those 18-39 were the most likely to purchase wedges (40% had purchased) compared to 60+, the least likely to purchase (16% had purchased).

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Sound bites.

F O L K L

“Because they have a connotation that they’re not overly healthy for you, that’s it probably.”

“We probably purchase oven fries maybe once a month and that’s more my husband who tends to purchase those because we take turns sharing the cooking but he’s just a bit, I guess he’s not as adventurous with his cooking, so he prefers things that are quick and easy so at least with fries you know you can just throw them in the oven and cook them. Hashbrowns, we’ll only purchase those if we really have people coming over or say like Mother’s Day and cook a Mother’s Day breakfast with hash browns, like special birthday breakfasts or something like that but it’s not a staple we have in the freezer.”

“I was going to blame the kids but I can’t really. Oh it’s, you know when you just feel like something greasy it’s always having available that cheap meal and just throwing some chips or hash browns in the oven.”

“Yeah we do but not often, so we did buy those potato hash brown things I think they’re McCains, we had those a couple of weeks ago. They were really nice and if we do like homemade fish & chips we might buy some oven fries. So I don’t buy wedges but we do buy oven fries occasionally and those little potato pom poms, like little round hashbrown things. There was a time I was buying actual hash browns as well for say a Sunday cooked breakfast but I stopped doing it, from a health perspective, not a good habit to get into.”

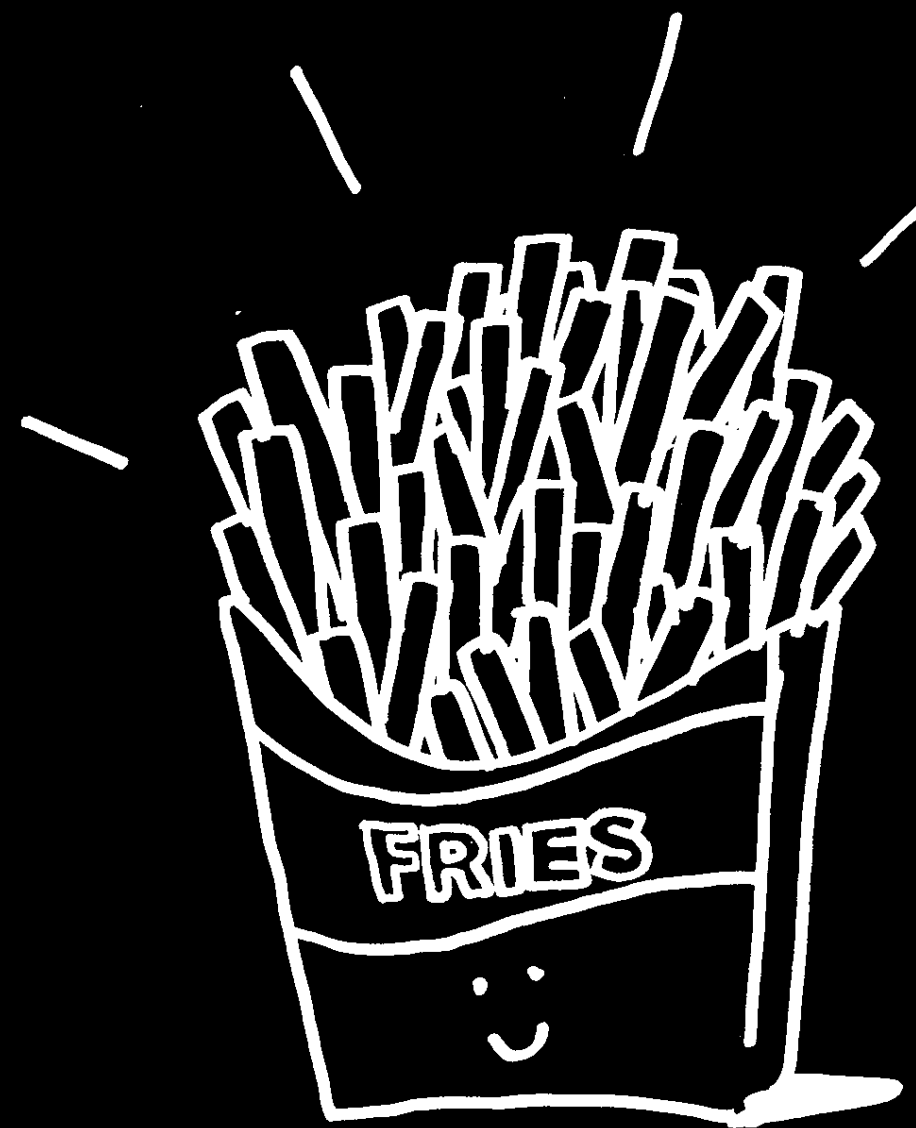
“It’s only for something for variety and convenience. Like if it was oven fries it’s just an easy Friday night dinner, open a bag, chuck them in the oven and have them with fish or something, a homemade fish & chips sort of dinner.”

“The convenience. If I don’t feel like cooking I’ll just cook up some fries and buy some frozen battered fish.”

“Totally convenience and probably the only potato product frozen that we actually like.”

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Takeaways.



Key Findings.



The peril of ‘sogginess’.

The quality of a hot chip can define and dictate the relationship between an individual and their preferred takeaway outlet. The prevailing negative when it comes to takeaway potato products is sogginess.

People will go out of their way to avoid their chips being soggy and this is a key factor guiding pick-up and/or in-store purchase preference above home delivery.

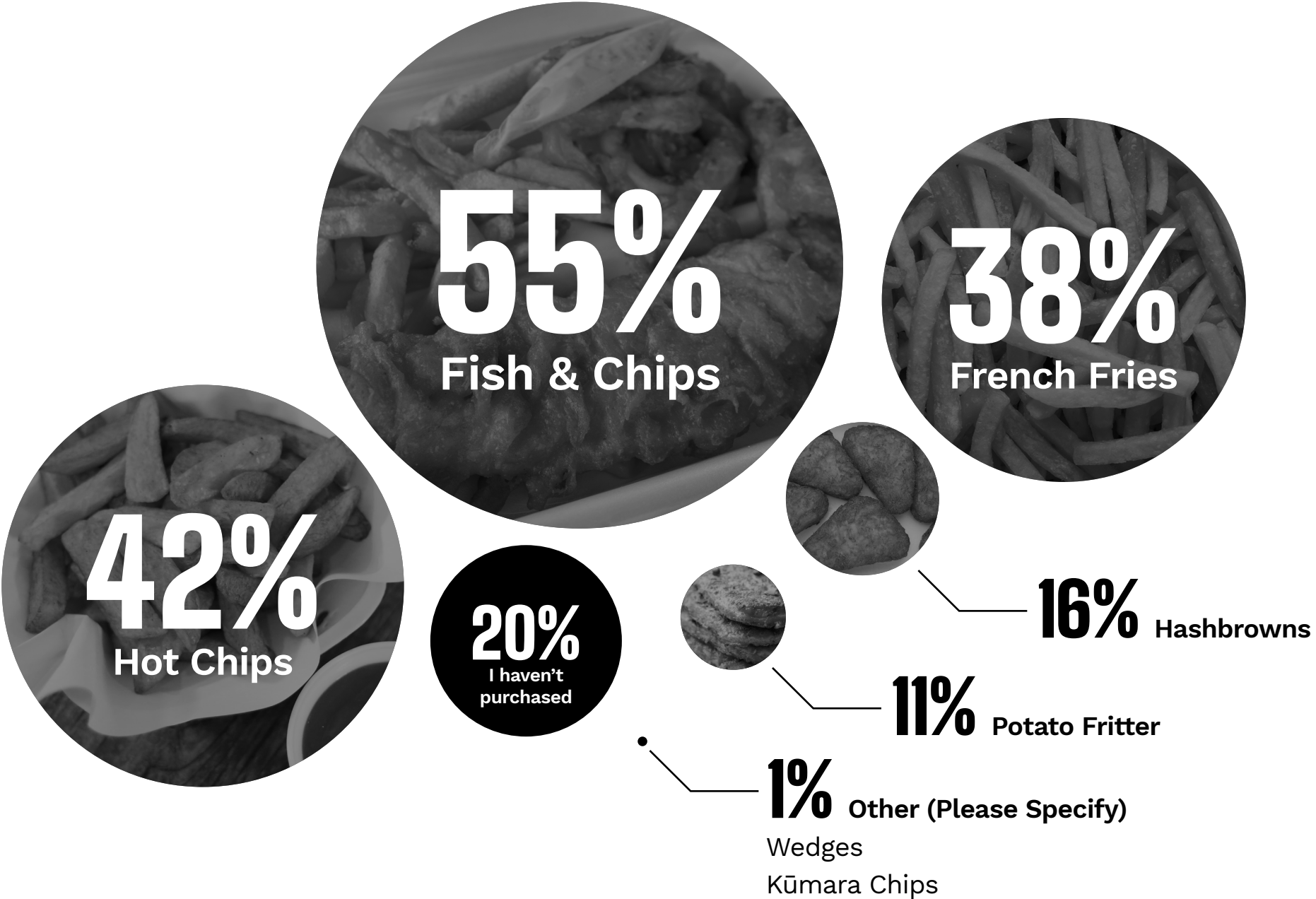


Crispy on the outside, fluffy on the inside.

People are passionate about hot chips. Great consideration is given as to what factors contribute to an ideal hot chip and people enjoy deliberating and trying different options here.

A good balance of texture and flavour are paramount. People dislike soggy and excessively oily chips and desire a satisfying level of both crisp and potato flavour.

Which of the following takeaway or 'fast food' potato products have you purchased in the past three months?



35%

Households with children are on average 35% more likely to have purchased french fries and hot chips than those without children.

71% v 46%

71% of those in Wellington had purchased Fish & Chips in the previous 3 months compared to 46% in Auckland.

60+

Those respondents aged 60+ were the least likely to have purchased takeaway of 'fast food' products (38% hadn't purchased), and those aged 30-39 were the most likely to (9% hadn't purchased).

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Sound bites.

**“Just like McDonalds?
Yep, only a couple of times.
I try not to get it, I always
find the french fries from
anywhere are pretty crap
because they get all soggy.”**

“No, no I’m just opposed to Uber full stop so I wouldn’t use them and I did ask a good friend about Deliver Easy and they advised me what not to get on the Deliver Easy and I think fish and chips was one because they get a bit soggy in the delivery and it depends on where you live. They live at the top of a hill down a windy steep driveway so I think they’ve ordered fish and chips and been turned off by the sogginess and they weren’t hot when they arrived. I live close enough to Newtown which has fish and chips, McDonalds, not that I go to McDonalds very often. I live close enough to be able to go and get it myself.”

**“Crispy on the outside and hot.
Not soggy! And portion as well,
when you order a scoop of chips
you want a scoop of chips.
Not a half portion or whatever.”**

“I’ll never be going back there again. Just rubbish, they weren’t even worth eating. What I have found is when they have a McCains sign out the front they tend to be better quality, I don’t know where they’re getting their chips from, whether they’re local ones or importing them, there seems to be really variable quality and then there’s quite variable quality to how they’re cooking them. And lots of nice salt on them too, not over the top but that’s always good.”

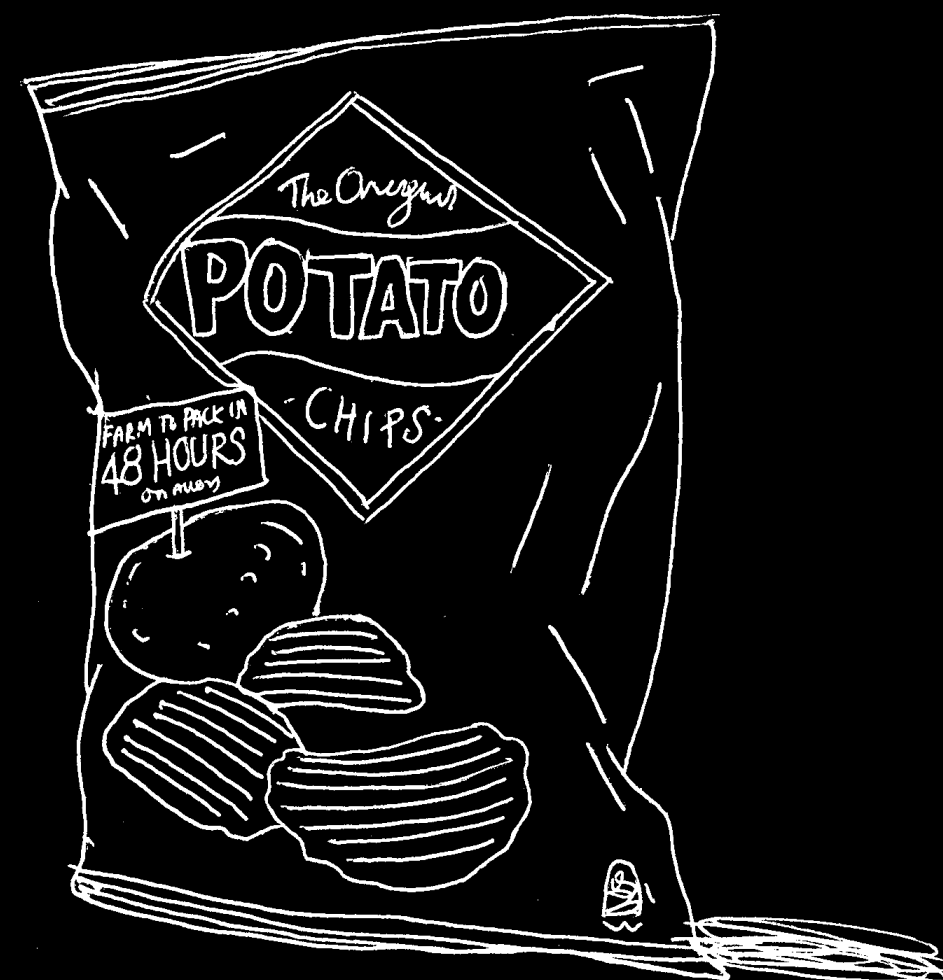
**“Not soggy. They’re hot. Our chippy
is very generous and they use
good oil so they’re nice and crisp.”**

“If it’s crunchy on the outside and nice and soft on the inside but still holds its shape and it’s made nice and fresh, not too oily, not too greasy and nice and hot.”

“I don’t like the McDonalds fries, they’re too thin and a bit soggy but I do prefer them a little bit thicker but then the fish & chip ones are very thick and not as crispy, the fish & chip ones.”

**“When it’s done right you do
you enjoy it, a combination of
little crispy bits and semi, not
soggy, soft and salty chips.”**

Potato Chips (Crisps).



Key Findings.



Much more than a crunchy, flavoured snack.

A favourite when it comes to snacking, potato chips are also associated with special occasions and times when people take a moment to treat themselves and/or enjoy the company of others.

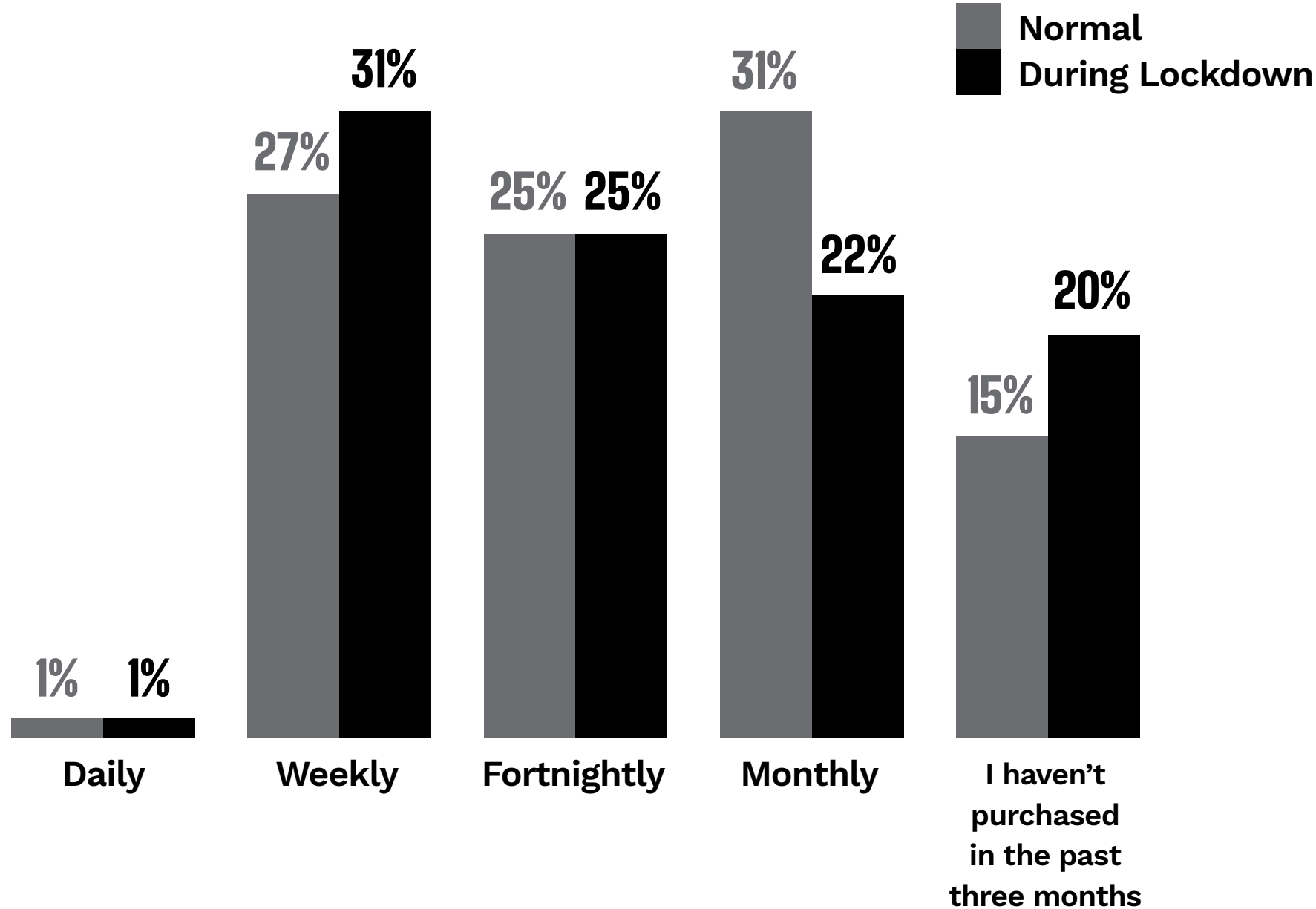
Hastily pulled out of the cupboard upon the spontaneous arrival of visitors and a crucial feature of a relaxing evening drink, potato chips are just as much a connector as they are a guilty pleasure.



The lockdown munchies.

Frequency of potato chip purchase experienced an increase during lockdown. People cited increased downtime and potential to snack as the reason for this.

How often do you buy potato chips (crisps)?



50%

Households with children are 50% more likely to purchase potato chips weekly than those without children.

31% v 25%

35% of males purchase chips weekly compared to 25% of females under normal circumstances. These changed to 30% of males and 33% of females under lockdown level 3 and 4.

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Sound bites.

“It’s more like pre-dinner with a drink thing that we do.”

“Everyone loves a salty snack. I think it’s just one of those things you don’t need but is a treat. We wouldn’t have them all the time but occasionally I would get those if I was going to visit friends, taking some snacks over or having people over for a visit.”

“Yeah an afternoon snack, on the weekend it’d be about 4 o’clock, salt and vinegar chips with a cold beer. For me I’m an active relaxer so I love doing stuff on the farm and outside and it’s that sort of time in the day where we’ll come in or sit on the outside furniture outside and have a nice cold drink and a bowl of chips, it’s hard to beat.”

“Say if people are coming over having a couple of drinks then. I probably wouldn’t buy a bag of chips and eat it to myself, unless other people are around.”

“During lockdown there was always a bag of potato chips. I think because there’s more down time so you’re like ‘what should I do... I’ll just eat something.’”

“If we’re having drinks and nibbles we’ll put out chips, if my daughter has friends around for a movie night then the chips will come out. If we go away camping we’ll take quite a lot of chips with us –they’re a leisurely snack. Certain times of the year we’ll eat a lot of chips.”

“I used to buy a packet of kettle chips and eat them all on my way home from the supermarket, they’re lethal. I’d hide the empty packet under the seat.”

“I hope she can’t hear me but the truth is yeah, I sneak a bag in now and again. If I’m out shopping getting the weekly groceries a bag might fall in. I love the crispy, salty ones. I pretend I’m going to have it for lunch but somehow the weekend has gone by, there are hardly any left in the bottom of the packet.”

INSIGHT APPLICATIONS.





BEYOND AGRIA:

An opportunity to educate?

People are interested in learning more about potatoes. At the moment the humble potato is relatively peripheral in relation to the New Zealand diet. A backseat stalwart at mealtime, the potato has the potential to be understood at a deeper level with consumers largely unaware of brand, nutritional and varietal attributes.

LOOK AND FEEL:

The power of consumer purchasing criteria.

The moment of purchase is pivotal and arguably the point in time when the consumer is the most engaged with the potato. Even when bagged, being able to visually and physically assess the potato is important to consumers. Features such as skin, dirt ratio, bruising and size are crucial factors in determining quality and the subsequent purchase decision.

RITUALS AND CUSTOMS:

Acknowledging New Zealand's potato folklore.

Potatoes are embedded within New Zealand's cooking culture. Roast potato recipes are passed down from generation to generation, and the quality of a hot chip has the potential to define the reputation of a fish and chip shop. These characteristics of potato folklore can be helpful in shaping consumer communications.

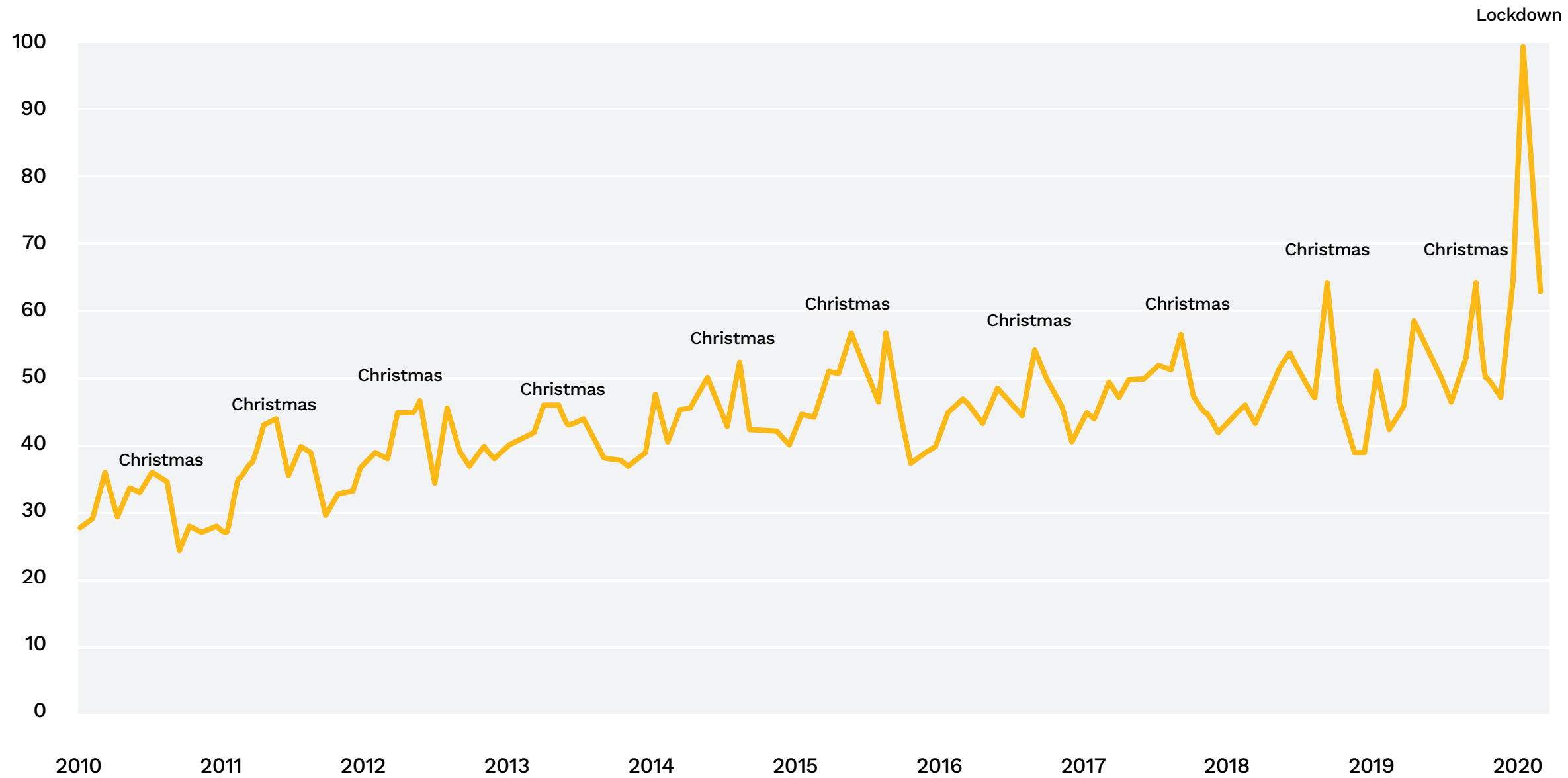
Thank you.



APPENDIX.



Potato related search trend for the last decade.



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Top potato related terms searched over the last decade (New Zealand).

RELATED TOPICS

Q Salad

Q Carbohydrate

Q Duck fat

Q Potato salad

Q Leftovers

RELATED QUERIES

Q Roast potatoes nz

Q How to make roast potatoes

Q Potato salad

Q How long to roast potatoes

Q Duck fat potatoes

Top potato related questions searched in May 2020 (New Zealand).

WHY?

🔍 Why potatoes turn green?

🔍 Why potatoes sprout?

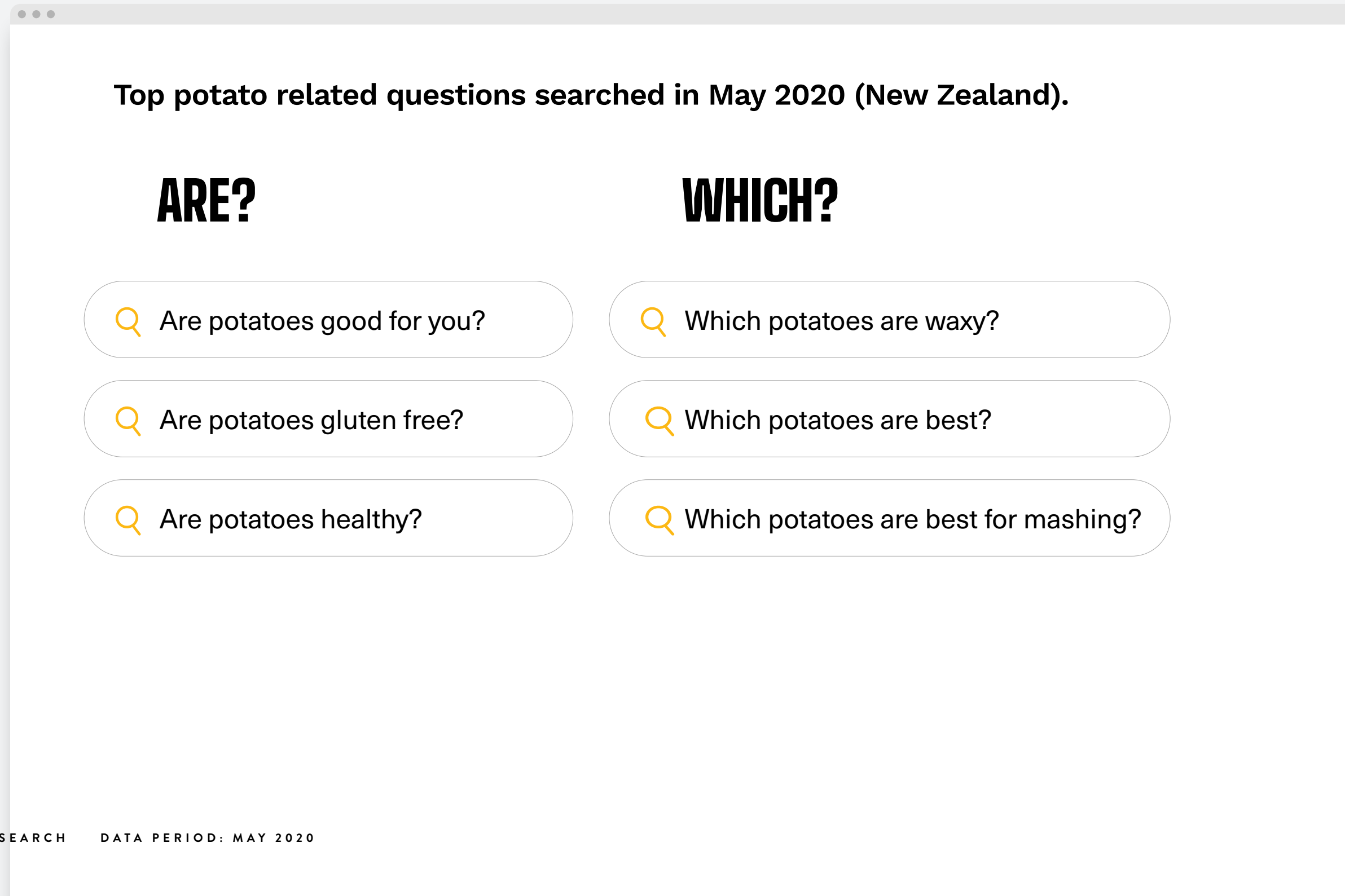
🔍 Why potatoes are bad?

WHAT?

🔍 What potatoes are best for roasting?

🔍 What potatoes are best for gnocchi?

🔍 What potatoes are best for mashing?





F O L K L