

# Research Summary

Bunnings New Zealand commissioned independent market research agency Insightfully Pty Ltd to undertake research to inform the potential introduction of facial recognition technology (FRT) in selected New Zealand stores. Fieldwork was delivered in partnership with Infield International NZ, an Auckland-based market research agency.

## Purpose

The purpose of the research was to understand how New Zealanders and Bunnings team members think about the use of FRT in a retail setting, including the perceived balance between improving safety and protecting privacy, and the conditions under which the technology would be considered acceptable.

## Methodology

The research was conducted from August - September 2025 using a mixed-methodology approach. Qualitative research included four in-person focus groups with retail customers across Auckland and Christchurch, as well as individual in-depth interviews with 20 Bunnings team members from a range of roles, locations and demographics.

Quantitative research consisted of a nationally representative online survey of 1000 retail customers in New Zealand, including a mix of Bunnings shoppers and non-shoppers, conducted from 2 – 11 September, 2025. The survey results were weighted to ensure representativeness of the New Zealand adult population, providing findings that reflect the broader community.

## Results

### **Retail customers recognise the safety challenges facing retailers**

About half of all retail customers (49%) have witnessed antisocial behaviour in a retail setting, with team being the main targets of such behaviour. There is, therefore, a broad understanding of the safety challenges facing retailers and openness to technology-based solutions to improve safety.

### **Support for FRT is strong, and much higher when the purpose and context is explicit**

The research found that community attitudes toward FRT in retail are considered and conditional and acceptance of FRT depends heavily on how and why it is being used. There is a strong expectation that any use of FRT should be proportionate to the issue it seeks to address, with a clear focus on preventing serious, harmful, or criminal behaviour rather than minor incidents.

Customers support the use of FRT for high-risk incidents such as weapons (74%), physical violence (73%), repeat theft (71%), intimidation (71%), and organised retail crime (70%). Support drops for lower-level issues such as loitering or minor shoplifting (50%).

Overall, initial support for FRT is high when the defined purpose is explicitly clear:

- 87% are supportive of the technology to 'prevent organised crime and high-value theft', and
- 84% are supportive of the use of FRT to 'protect the health, safety, and security of customers and team'.

Moreover, after viewing an explainer about the technology and hearing from team about their personal experiences with violence and crime, support rose even further.



Community acceptance of the technology is closely tied to whether FRT is seen to deliver meaningful safety outcomes, while protecting the privacy of regular shoppers. Almost all customers are willing to accept its use where there is a clear benefit:

- 93% support FRT if it reduces harm by more than 10%, and
- Only 7% oppose its use on principle.

#### Trust hinges on safeguards and transparency

Customers' privacy concerns are less about being surveilled/watched (50% concerned) or retailers knowing more about shopping habits (52% concerned), but more about data security and hackers using personal information for other reasons (73% concerned).

That is why support for FRT is strongest when people understand how FRT works and the safeguards that are in place. The research shows that support is highest when customers are aware that:

- The system is privacy compliant and regularly audited by independent parties
- Human verification in the form of two team members is needed to confirm every match before acting
- It has been independently proven to work in other retail settings
- Its purpose is only for safety and the prevention of crime
- Regular shoppers' data is not kept and deleted within seconds

There is a clear expectation that FRT should be used transparently, with visible signage and accessible explanations of how the technology works and how data is managed.

#### Team members see value but need support

Interviews with Bunnings team members indicated that they are highly supportive of FRT as a valuable tool to improve safety. However, their support is contingent on clear guidance around their roles, structured training on how the technology works, and access to ongoing support.

Importantly, team members do not see FRT as a replacement for existing safety measures. There is a strong expectation that it should complement staffing, training, and broader security processes.

#### Leanne White

GAICD, QPR – TRS

Founder and Managing Director