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Consumer Use of Nutrition Content Claims in Shopping Environments

Research Report

prepared for

Food Standards Australia New Zealand

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1 EXECUTIVE SUMMARY

1.1 Introduction

- Food Standards Australia New Zealand commissioned two studies to enhance the understanding of the use and influence of nutrition content claims in purchase decisions.
- Colmar Brunton Social Research (CBSR) was commissioned to conduct the first consumer research study investigating the use and influence of nutrition content claims in purchase decisions, in a real-world shopping environment.
- The key objectives of this research were:
    - Investigate the use of nutrition content claims in real-world shopping environment, and reasons for use
    - Determine the importance/influence of nutrition content claims in purchase decisions
    - To explore differences in purchase behaviour and use of label elements between muesli bars and breakfast cereals
- The research involved n=492 in-store observations and n=187 face to face interviews with shoppers in Sydney, Melbourne and Auckland. The research was conducted between 21st – 24th June 2007.
- This report presents the findings of this research.
- This study will complement the second study; a larger experimental study investigating the impact of nutrition content claims on product nutrition attitude and purchase intention.

1.2 Key findings

Use of nutrition content claims and other label elements

- Nutrition content claims were present on 85% (n=159) of the products selected/not selected (of 187).
- Of the on-pack information read, the top four pieces of information reported were brand / product / flavour name (58%), the ingredients list (36%), the nutrition information panel (34%) and a nutrition content claim when present (20%). Significantly more respondents read the nutrition information panel, the ingredients list, or the brand/product name compared with a nutrition content claim.
- Overall, a fifth of the shoppers interviewed reported having read a nutrition content claim (when present). Over two-thirds of these shoppers purchased the product and the remaining 31% did not purchase the product.
- Of this 20% of consumers who read a nutrition content claim, three quarters indicated they used the claim 'a lot' in their purchase decision. This was similar to the level of use of other key information used in decisions such as the nutrition information panel (78%), ingredients list (72%) and brand or product name (76%).

- There were no differences in use of nutrition content claims between breakfast cereals and muesli bar products.

- The reasons reported for use of nutrition content claims included use for a "quick health check" or to compare more than one product (in conjunction with use of the nutrition information panel and ingredients list. Of the 32 shoppers who used a nutrition content claim in their purchase decision, 12 also used the nutrition information panel as well.

- Caution is required in any conclusive statements given the small sample that were found to be using nutrition content claims during shopping.

Level of trust in nutrition content claims

- Trust towards nutrition content claims was significantly higher for those who reported reading a nutrition content claim compared to those not reading a claim.

- Average levels of trust were statistically significantly higher in New Zealand compared to Australia.

- The level of trust towards nutrition content claims did not differ between breakfast cereal and muesli bar sections.

Product selection

- The top five most frequently sited reasons for product selection (or non-selection) were: general health reasons (e.g. healthy/good for you) (27%), product features (e.g. flavour) (27%), brand (21%), price (20%), and habit (20%).

- Open-ended comments suggested sugar specifically was a key ingredient shoppers were looking for information on, especially when selecting products for children.

- Sugar and fat were considered important factors when determining product suitability in a purchase decision.

Shopping style

- Shoppers in the breakfast cereal and muesli bar aisles tended to select products relatively quickly. Eighty-six per cent of breakfast cereal shoppers and 95% of muesli bar shoppers selected products either immediately or within 1-2 seconds. The remainder of shoppers browsed thoroughly.

- Of shoppers who selected a product immediately, significantly more were likely to have not used a nutrition content claim in their purchase decision, compared with those who did use a nutrition content claim. Also, of those who browsed thoroughly, more were likely to have used a nutrition content claim, compared with those who did not.

Summary

- While this study explored the use and impact of nutrition content claims on purchase decisions in a realistic shopping environment, the sample is not a probabilistic sample and results cannot be extrapolated to represent shopping behaviours of Australia and New Zealand's general populations. The experimentally-designed study commissioned by FSANZ used real-life product mock-ups to investigate consumer responses to nutrition content

claims (purchase intentions and product evaluations) using samples representative of the Australian and New Zealand general populations.

- Findings from these studies will complement each other in order to further the understanding of the impact of nutrition content claims in purchase decisions for products considered to be of lower nutritional value, of consumers in Australia and New Zealand.

2 INTRODUCTION

2.1 Background

FSANZ is a statutory authority operating under the *Food Standards Australia New Zealand Act 1991*. FSANZ's aim is to protect the health and safety of people in Australia and New Zealand through the development of effective food standards. FSANZ does this collaboratively with all Australian governments and the government of New Zealand, and with industry, consumer and public health stakeholders.

FSANZ is responsible for developing, varying and reviewing food standards that regulate the labelling and composition of food, and for developing codes of conduct and guidelines with industry for food sold in Australia and New Zealand. In Australia, FSANZ also develops food standards for food safety, maximum residue limits and primary production and processing.

FSANZ issued a Draft Assessment Report in November 2005 setting out a proposed approach to the regulation of Nutrition, Health and Related Claims together with the proposed new Standard 1.2.7 – Nutrition, Health and Related Claims. The proposed draft Standard set out the criteria and conditions for making nutrition content claims, health claims and related claims. This included criteria for the composition of foods able to make certain claims, wording conditions substantiation requirements[1] and exemptions from the general approach.

Comments received from submitters to the Draft and Preliminary Final Assessment Reports highlighted concerns about consumers' use and comprehension of nutrition content claims. One area of concern is the influence of nutrition content claims when they are on products of lower nutritional quality. Previous research commissioned by FSANZ has shown some degree of difficulty among some consumers in accurately interpreting nutrient content claims[2]. However, there has been little research exploring the effect of such claims on the purchase decisions of consumers; in particular, very little research of this nature with consumers in real-world shopping environments.

FSANZ has commissioned two research projects exploring the influence of nutrition content claims on consumers' evaluations and purchase decisions. One study utilised an experimental design to measure the impact of nutrition content claims on consumers' evaluations of the overall nutritional value of the product and purchase intention; the second study reported here explores consumer use of nutrition content claims in shopping environments. Colmar Brunton Social Research was commissioned to undertake the second study.

Previous research on the use of nutrition labels has reported high levels of their use by consumers. For example, research commissioned by FSANZ has suggested that approximately two-thirds of respondents use some form of nutrition label information, even if only occasionally[3].

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[1] FSANZ 2005, *Draft Assessment Report Proposal P293 Nutrition, Health and Related Claims 7 December 2005*, FSANZ, Canberra. (Available at: Food Standards Australia New Zealand: Proposal P293 - Nutrition, Health and Related Claims).

[2] NFO Donovan Research 2003, *A qualitative consumer study related to nutrition content claims on food labels Report to Food Standards Australia new Zealand*, FSANZ, Canberra. (Available at: Food Standards Australia New Zealand: Consumer study related to nutrition content claims(July 2003)).

[3] NFO Donovan Research 2003, *Food labelling issues: Quantitative research with consumers. Report to Food Standards Australia New Zealand. (Evaluation Report Series No 4),* FSANZ, Canberra. (Available at: Food Standards Australia New Zealand: Food labelling issues: Quantitative research with consumers (June 2003)).

However, studies of consumers in real-world shopping environments suggest the use of nutrition label information may be much lower[4]. The study reported here focuses on the use of nutrition content claims by consumers in real-world shopping environments to better understand if such claims are being used, how they are being used, and how important they are in purchase decisions of consumers.

2.2 Research objectives

The broad objectives of this research were:

- To design a study to collect data from consumers in a realistic retail environment;
- To design and refine an instrument to collect data on the actual behaviour and reasons for the selection of products that carry nutrition content claims;
- To undertake research in a suitable natural environment, ensuring appropriate permissions from venue owners are gained and;
- To provide a written report on the findings, sampling, methodology and analysis.

The key objectives of the research were:

- To investigate the use of nutrition content claims in a real-world shopping environment, and reasons for use;
- To determine the importance/influence of nutrition content claims in purchase decisions and;
- To explore differences in purchase behaviour and use of label elements between muesli bars and breakfast cereals.

[4] European Heart Network 2003. *A systematic review of the research on consumer understanding of nutrition labelling*, EHN, Brussels.

3 METHODOLOGY IN BRIEF

In order to investigate the use and influence of nutrition content claims in purchase decisions in a real-world shopping environment, this research comprised observations and interviews with shoppers in supermarkets in Sydney, Melbourne and Auckland. This enabled actual behaviour to be observed in relation to food products shopped for, bought and the degree of interaction of the shopper with package labelling. The interviews added to the observations by exploring shoppers' perceptions and attitudes towards on pack nutrition content claims.

3.1 Quantitative research

In-store observations and interviews were conducted on Thursday 21st June 2007 (3pm-7pm) and Saturday 23rd June 2007 (10am-2pm). Overall, 492 quantitative in-store observations (tracks) were completed with shoppers across 3 cities and 6 stores (2 stores in each city), as detailed in Table 1 below. A sub-sample of the 'tracked' shoppers was invited to be interviewed. Invitations for the interviews were made at the discretion of the interviewer. That is, the interviewer randomly selected shoppers for interviews. However, quotas were put in place to ensure that those interviewed exhibited a range of behaviours (refer to section 3.1.1). The number of shoppers approached for an interview was not recorded. One hundred and eighty-seven respondents completed a five minute interview at the shelf regarding shopping behaviour and use and influence of package label information in purchase decisions. Both the observations and the interviews were completed by trained experienced shopper behaviour staff from Colmar Brunton Field Services (and Reid Research in New Zealand) and an incentive of $5 was provided to participants interviewed.

Table 1: Overall quota sheet

	Total Tracked (n=492) Total Interviewed (n=187)					
Quotas	Sydney (Tracked n=171) (Interviewed n=60)		Melbourne (Tracked = 131) (Interviewed n=67)		Auckland (Tracked n=190) (Interviewed n=60)	
Tracked n=	**n=69**	**n=102**	**n=76**	**n=55**	**n=76**	**n=114**
Interviewed n=	**n=24**	**n=36**	**n=31**	**n=36**	**n=27**	**n=33**
Stores	Coles	Woolworths	Coles	Safeway	New World	Pak n save
Dates	1. Thurs 21st June 2007, 3pm-7pm	2. Sat 23rd June 2007 10am-2pm	1. Thurs 21st June 2007, 3pm-7pm	2. Sat 23rd June 2007 10am-2pm	2. Sat 23rd June 2007 10am-2pm	1. Thurs 21st June 2007, 3pm-7pm
Socio-economic status*	Low (Penrith)	High (Bondi)	High (Knox)	Low (Altona)	High (Victoria Park)	Low (Manakau)

Note: Locations were chosen in order to ensure that within each city both high and low socio-economic locations were included in the study. Socio-economic locations were selected for sampling purposes by a subjective method, based on the prior experience of CBSR. Further analyses relating to socio-economic status are not based on these locations but are based on stated income levels.

3.1.1 Sampling

The sample was a selection of those shopping in the required sections at the time of the research. (The two sections of consideration contained Muesli Bars and Breakfast Cereals). Quotas were put in place to ensure shoppers exhibiting a range of behaviours were interviewed.

Respondents were categorised into the following groups: 'Read and bought', 'Read and not bought' or 'Not read and bought'. 'Reading' was indicated via a shopper picking up the pack. 'Buying'/'Purchasing' was indicated by a shopper placing the product in their basket/trolley. I.e. Those classified as 'Read and bought' were observed by the interviewer to have read the pack and then placed it in their basket/trolley. 'Read and not bought' was used to classify shoppers who exhibited the same behaviour, but then did not select the pack (that is, they did not place it in their basket/trolley). For a shopper to be classified as 'Not read and bought' they had to select the product instantly, and not pick up the pack to read label information prior to putting the product in their basket/trolley. However, it is acknowledged a quick read of main front of pack elements was possible by these shoppers.

As the sample for this study was based on quota sampling, the sample is not probabilistic and therefore not representative of the Australian or New Zealand general populations.

Table 2: In-store behaviour quota sheet

	Total Interviewed (n=187)					
Quotas	Section A (Read and Bought) Interviewed n=74		Section B (Read and Not Bought) Interviewed n=73		Section C (Not Read and Bought) Interviewed n=40	
Category	**Breakfast cereal**	**Muesli Bars**	**Breakfast cereal**	**Muesli Bars**	**Breakfast cereal**	**Muesli Bars**
n=	**n=37**	**n=37**	**n=37**	**n=36**	**n=19**	**n=21**

3.1.2 Interview questionnaire

The interview questionnaire was developed by CBSR with input from FSANZ – initially through the project scoping meeting and then through a series of iterations of developing the questionnaire.

The questionnaire consisted of mainly unprompted questions, and covered a range of topics including:

- Level of planning prior to entering the store;
- Reason for product selection/non-selection;
- Information read on pack;
- Use of various label information in the purchase decision;
- Level of trust towards nutrition content claims; and
- Respondent demographics.

The questionnaire can be seen in Appendix E.

3.1.3 Observation instrument

The observation instrument used was a modified standard tracking sheet, designed specifically for tracking a shopper's in-store behaviour. The tracking sheet records a variety of information including:

- Time in section;
- Shopper demographics;
- Alone/with others;
- Level of influence of other;
- Overall shopping style; and
- Products interacted with & how (e.g. read, picked up, bought etc.).

The tracking sheet can be seen in Appendix F.

3.2 Sample

3.2.1 Demographic variables

Within each store both breakfast cereal and muesli bar shoppers were observed and interviewed. Demographic variables for the interviewed respondents were collected and are shown in Table 3.

A similar number of respondents fell into the '18-40 years' and '41 years and over' age groups. As expected, more females were interviewed than males reflecting the typical grocery buyer population. Seventy-four percent of respondents provided household income data and of these 33% stated they had a medium-low household income and 41% a high household income. (High income was classified by an annual household Australian income of over $67,599, and a New Zealand income of over $70,000. Medium to low income was classified as an annual Australian income of less than $67,600, and a New Zealand income of less than $70,001.)

Dependent status indicated household with / without children aged 17 years and under living at home.

3.2.2 Personal variables

Personal variables were collected, for example familial health concerns and an individual's attention to a healthy diet.

General dietary concerns includes: watching my weight/others weight generally, watching my health/others health generally, pregnancy, on a specific diet, religious, ethical beliefs that influence dietary choices/vegetarian/vegan. *Specific health concerns* includes: food allergy, other health concerns such as asthma, diabetes, migraine, digestive concerns such as coeliac disease, irritable bowel syndrome; health concerns such as heart disease, high blood pressure or cholesterol.

Attention to healthy diet is presented as a mean score out of 5, where 1 = very low amount of attention and 5 = very high amount of attention. Responses of 'no attention' were less than 1% and have been removed from analysis.

Table 3: Respondent demographics

Demographics : Total Respondents N=187	
AGE	
Aged 18-40 years	49%
Aged 41 years and older	51%
GENDER	
Males interviewed	30%
Females interviewed	70%
INCOME	
Medium to low income	33%
High income	41%
Prefer not to answer	26%
HOUSEHOLD	
Dependents	43%
No Dependents	57%
EDUCATION	
High School or lower	39%
Post High School	58%
Prefer not to answer	3%
HEALTH CONCERN	
No Health Concerns	27%
General Dietary Concerns	65%
Specific Health Concern	41%
ATTENTION TO HEALTHY DIET (mean score out of 5)	3.9

Note: *Health concerns* question is a multiple response question.

3.3 Data Analysis

3.3.1 Percentages

Respondents who completed an interview but did not answer a particular question have been excluded from the tabulation of results and calculation of statistics for that question.

Percentages are generally rounded to whole numbers. Some percentages may not add to 100 percent due to rounding.

3.3.2 Sorting of results

In all horizontal bar charts, rows are sorted from most frequent response to the least.

3.3.3 Reporting significant difference

Statistically significant differences between percentages have been tested at the 95% confidence interval primarily using Z-tests to explore differences between data splits. In the case multiple data splits, multiple pair wise analysis has been run.

Z-tests have been used to compare means or proportions. Z-tests are essentially the same as T-tests (used when the sample size is over N=30).

To indicate statistically significant differences columns have been labelled with letters (e.g. A, B, C) and statistically significant differences to other columns is indicated via notation using the column letter and also shading. Statistically significant differences at CI=95% between responses in rows have been indicated using lowercase letters.

Comparisons were not carried out where the sum of case weights was less than two or the column proportion was equal to zero or one.

Note: Refer to Technical Appendix A for further explanation of methodology, reporting and data analysis.

4 DETAILED FINDINGS

4.1 Product selection

Respondents were asked what made them purchase (or not purchase) a particular product that they had been observed interacting with (i.e. reading, looking at or placing in basket/trolley).

The aim of this question was to understand if respondents selected a product based on a health-related reason: a general health reason (e.g. healthy/good for you); a specific health reason (e.g. food allergy, digestive concerns); a weight control reason; or because the product contains natural ingredients. Forty-five per cent of respondents selected one of these health-related reasons when asked this question.

As shown in Table 4 below, general health reasons (e.g. healthy/good for you) were mentioned by over a quarter of the sample. This, in conjunction with product features (e.g. flavour), brand, price and routine were the most frequently cited reasons for product selection. This suggests that when shopping for breakfast cereals/muesli bars, health factors are one of the top considerations driving purchase behaviour of consumers.

Q2a, Q11a, Q20a: So what made you choose/not choose that particular product today?

Table 4: Reasons for product selection/non-selection

	Total n=187	(A) Selection n=114	(B) Non-selection n=73
a. Product Feature (e.g. flavour)	27%[f]	32%[B]	18%[A]
b. General health reasons (e.g. healthy / good for you)	27%[f]	25%	29%
c. Brand	21%[f]	30%[B]	8%[A]
d. Price	20%[f]	18%	22%
e. Is what I (or my family) usually eat(s)	20%[f]	29%[B]	7%[A]
f. Others in family / household preferences / Influence from others	11%[i]	15%[B]	5%[A]
g. Other	10%[j]	3%[B]	21%[A]
h. Specific health reasons (e.g. food allergy / medical reasons /	9%j	6%	12%
i. Natural ingredients	5%	8%	0%
j. Weight	4%	4%	4%
k. Just saw it and wanted it	4%	7%	0%
l. Cheers me up / makes me feel good	3%	4%	1%
m. Is easily available in shops / supermarkets	1%	1%	0%
n. Australian-made / NZ-made	1%	1%	0%

Note: Table 4 presents multiple response sets.

As shown in Table 5 below, there were few differences in reasons for product selection or non-selection between Australia and New Zealand. However, statistically significantly more respondents in New Zealand reported the reason influence from others as a motivator in their purchase decision.

Table 5: Reason for product selection/non-selection, by country

	(A) Australia	(B) New Zealand
	n= 127	n=60
Product Feature (e.g. flavour)	24%	33%
General health reasons (e.g. healthy/good for you)	28%	23%
Brand	25%	15%
Price	22%	15%
Is what I (or my family) usually eat(s)	18%	25%
Others in family/household preferences/Influence from others	8%[B]	22%[A]
Other	9%	12%
Specific health reasons (e.g. food allergy /medical reasons/digestive concerns)	10%	5%
Natural ingredients	2%	12%
Weight	5%	2%
Just saw it and wanted it	2%	10%
Cheers me up/makes me feel good	2%	7%
Is easily available in shops/supermarkets	0%	2%
Australian-made/ New Zealand Made	0%	2%

Notes: Table 5 presents multiple response sets.

As shown in Table 6 below statistically significantly more respondents aged 41 years and over used routine (what I/family usually eats) as a driver in their purchase decision, compared to respondents who were 18-40 years.

In addition, statistically significantly more medium-low income respondents stated general health reasons (e.g. healthy/good for you) and specific health reasons (e.g. food allergy/medical reasons/digestive concerns) as reasons for product selection compared to high income respondents.

Specific health reasons (e.g. food allergy/medical reasons/digestive concerns) was selected as a reason for product selection/non-selection by statistically significantly more high school educated respondents compared to those with higher education.

Table 6: Reason for product selection/non-selection, by gender, age, income and education level splits

	Gender		Age		Income			Education	
	(A) Male	(B) Female	(A) 18-40 years	(B) 41 years and over	(A) Medium - Low income	(B) High Income	(C) Did not answer	(A) High school	(B) Higher education
	55	132	92	95	62	77	48	72	109
Product Feature (e.g. flavour)	34%	24%	27%	26%	32%	29%	17%	26%	28%
General health reasons (e.g. healthy/good for you)	34%	24%	22%	32%	37%B	21%^{A}	23%	26%	28%
Brand	25%	20%	20%	23%	19%	25%	19%	15%	25%
Price	18%	21%	20%	20%	24%	14%	23%	22%	18%
Is what I (or my family) usually eat(s)	13%	24%	13%^{B}	27%^{A}	10%^{C}	19%^{C}	36%^{AB}	22%	18%
Others in family/household preferences/Influence from others	9%	12%	11%	12%	10%	16%	7%	10%	13%
Other	11%	9%	13%	6%	8%	10%	11%	3%^{B}	15%^{A}
Specific health reasons (e.g. food allergy /medical reasons/digestive concerns)	5%	10%	5%	12%	16%^{BC}	5%^{A}	4%^{A}	15%^{B}	5%^{A}
Natural ingredients	5%	5%	5%	4%	2%	6%	6%	7%	3%
Weight	2%	5%	3%	4%	3%	5%	2%	1%	5%
Just saw it and wanted it	4%	5%	3%	5%	8%	1%	4%	7%	2%
Cheers me up/makes me feel good	5%	2%	3%	3%	5%	4%	0%	0%	6%
Is easily available in shops / supermarkets	2%	0%	1%	1%	2%	0%	0%	1%	0%
Australian-made/ New Zealand Made	2%	0%	0%	1%	2%	0%	0%	1%	0%

Notes:

- Table 6 presents multiple response sets.
- Respondents who did not answer education question (n=3) have been removed

Table 7 shows that statistically significantly more respondents who had a specific health or general dietary concern selected general health reasons (e.g. healthy/good for you) as a reason for product selection/non-selection compared to those who had no health concerns.

Respondents with no dependents reported influence from others as a reason for their purchase decision, significantly more than respondents with dependents.

Table 7: Reason for product selection/non-selection, by dependents, health concerns and attention paid to diet splits

	Dependents		Health			Attention paid
	(A) Dependents	(B) No dependents	(A) Specific health concern	(B) General dietary concern	(C) No concern	Average Score
	81	**106**	**90**	**105**	**50**	**187**
Product Feature (e.g. flavour)	25%	30%	27%	28%	27%	3.8
General health reasons (e.g. healthy/good for you)	27%	26%	37%^{C}	34%^{C}	8%^{AB}	4
Brand	22%	21%	17%	21%	25%	3.9
Price	23%	16%	16%	14%	36%	3.7
Is what I (or my family) usually eat(s)	18%	23%	18%	18%	24%	3.9
Others in family/household preferences/Influence from others	6%^{B}	19%^{A}	12%	12%	9%	3.7
Other	8%	11%	10%	8%	10%	3.5
Specific health reasons (e.g. food allergy /medical reasons/digestive concerns)	9%	7%	14%	12%	0%	4.1
Natural ingredients	4%	6%	6%	3%	2%	4.7
Weight	5%	2%	6%	7%	0%	4.3
Just saw it and wanted it	1%	9%	6%	3%	6%	3.4
Cheers me up/makes me feel good	2%	5%	4%	4%	4%	3.3
Is easily available in shops / supermarkets	1%	0%	0%	0%	2%	3
Australian-made/ New Zealand Made	0%	1%	1%	1%	0%	3.3

Note: Table 7 presents multiple response sets.

As shown in Table 8, statistically significantly more respondents cited general health reasons (e.g. healthy/good for you) as a contributing factor in their product selection for muesli bars compared with breakfast cereals.

Habit was the number one reason for selection of breakfast cereals with significantly more respondents using this reasoning in their purchase decision, compared with muesli bars.

Product features, such as flavour, were also likely to influence muesli bar purchase decisions compared with breakfast cereal purchase decisions.

Breakfast cereals were more likely to be purchased due to habit than due to health reasons.

Table 8: Reasons for product selection/non-selection, by category shopped

	(A) Breakfast cereal n=93	(B) Muesli Bar n=94
a. Is what I (or my family) usually eat(s)	29% B,c	12%A
b. Brand	20%j	22%
c. Price	17%j	22%
d. General health reasons (e.g. healthy/good for you)	15%B,k	38% A
e. Product Feature (e.g. flavour)	14%B,k	39% A
f. Others in family/household preferences/Influence from others	11%	14%
g. Other	11%	9%
h. Specific health reasons (e.g. food allergy /medical reasons/digestive concerns)	10%	7%
j. Just saw it and wanted it	7%	2%
k. Natural ingredients	4%	5%
l. Weight	4%	3%
m. Cheers me up/makes me feel good	4%	2%
n. Australian-made/ New Zealand Made	1%	0%
o. Is easily available in shops/supermarkets	0%	1%

Note: Table 8 presents multiple response sets

As shown in Table 9, half of the respondents who did not read the pack prior to selecting the product, cited habit as the key reason cited for their purchase. This reason was cited by this group significantly more than those who read and bought/did not buy the product.

Those in the 'not read and bought' category also cited influence from others, and brand as key influences in their purchase decisions compared with those in the 'read and not bought' category.

Table 9: Reasons for product selection/non-selection, by observed in-store behaviour

	(A) Read and bought n=74	(B) Read and not bought n=73	(C) Not Read and bought n=40
General health reasons (e.g. healthy/good for you)	30%	29%	18%
Product Feature (e.g. flavour)	34%	18%	30%
Brand	27% [B]	8% [AC]	35% [B]
Is what I (or my family) usually eat(s)	18% [C]	7% [C]	50% [AB]
Price	18%	22%	20%
Others in family/household preferences/Influence from others	15%	6% [C]	20% [B]
Other	3%	21%	3%
Specific health reasons (e.g. food allergy /medical reasons/digestive concerns)	10%	12%	0%
Natural ingredients	11%	0%	3%
Just saw it and wanted it	10%	0%	3%
Weight	4%	4%	3%
Cheers me up / makes me feel good	4%	1%	5%
Australian-made/New Zealand-made	1%	0%	0%
Is easily available in shops/supermarkets	0%	0%	3%

Notes:

- Table 9 presents multiple response sets
- 'Read and bought' and 'Read and not bought' = shopper picked up product and appeared to read label
- 'Read and bought' and 'Not read and bought' = shopper put product in baskey/trolley ('Not read and bought' may have involved reading of front of product package)

4.1.1 Reasons for perceived product suitability/non-suitability

A total of 45% of respondents reported a reason related to healthiness as a driver in their purchase decision of a breakfast cereal or muesli bar: Table 4 shows that 27% of respondents based their purchase decision (selected/did not select a product) on a general health reason (e.g. healthy/good for you); 9% based it on a specific health reason (e.g. food allergy, digestive concerns); 4% based it on a weight control reason; and 5% based it on natural ingredients in the product. For this 45% of respondents who reported a health-related reason such as the above responses, an open-ended question was included to understand what led them to consider the particular product was suitable or not suitable for their family.

Table 10 shows that many respondents referred to proportions or levels of specific nutrients or ingredients (e.g. fat, sugar, fibre, soy, etc.) as a means for gauging a product's suitability.

Q2b, Q11b, Q20b, What specifically made you think the product was suitable/not suitable for you/your family?

Table 10: Reasons for product suitability/non-suitability

No of comments:	Not Selected n=44	Selected n=73
Sugar content	54%	10%
Fat content	35%	13%
Like/dislike flavours (general)	4%	13%
Healthy option/good for you/nutritious (general)	0%	16%
Specific health requirement for self e.g. diabetic	12%	3%
Salt content	12%	1%
Fibre content	8%	5%
Natural ingredients/organic	0%	10%
Brand	0%	10%
Value for money	8%	0%
Appealing for family/kids (general)	0%	5%
Other	8%	13%

Notes:

- Significance testing has not been conducted as proportions are based on post-coded open-ended responses
- Responses are reported for Total only as sample size is too small to split between categories
- Table 10 presents multiple responses
- 'Other' response represents grouped responses due to small sample sizes, and includes carbohydrates content, additives, filling/substantial, combination of ingredients, specific health requirement for other (e.g. gluten-free), appealing for self, National Heart Foundation tick, provides energy.

Example Verbatim Comments

"Oats are generally a good health option."

"Eat special K cereal. Liked flavour. Appeared healthy."

As demonstrated in the above verbatim, some comments were of a general nature towards perceived healthiness.

Example Verbatim Comments

"Gluten free needed for husband very aware of the needs of family because of husband"

"Too many grams of fat"

For many respondents, sugar was a key theme with the majority of respondents who referred to a specific ingredient mentioning sugar. Fat was also mentioned frequently in determining product suitability.

Example Verbatim Comments

"Contains flavours my daughter likes, but sugar levels are too high"

"Comparing sugar. Not happy with sugar content even though this is what I usually buy"

4.2 Use of on-pack Information

4.2.1 On-pack information Read

Respondents who were observed reading label information on product packaging were asked specifically what they had read. During this process the interviewer referred specifically to the particular product of interest to ensure accuracy of responses.

The aim of this question was to measure the extent to which shoppers reported noticing and reading nutrition content claims on labels (when present), relative to all the other labelling elements. It is important to note that whilst other types of label information such as nutrition information panel, the ingredients list, the product name and brand name are present on all products, some products did not have nutrition content claims present on the label (the data displayed in Figure 1, has been adjusted for nutrition content claims not being present on some products).

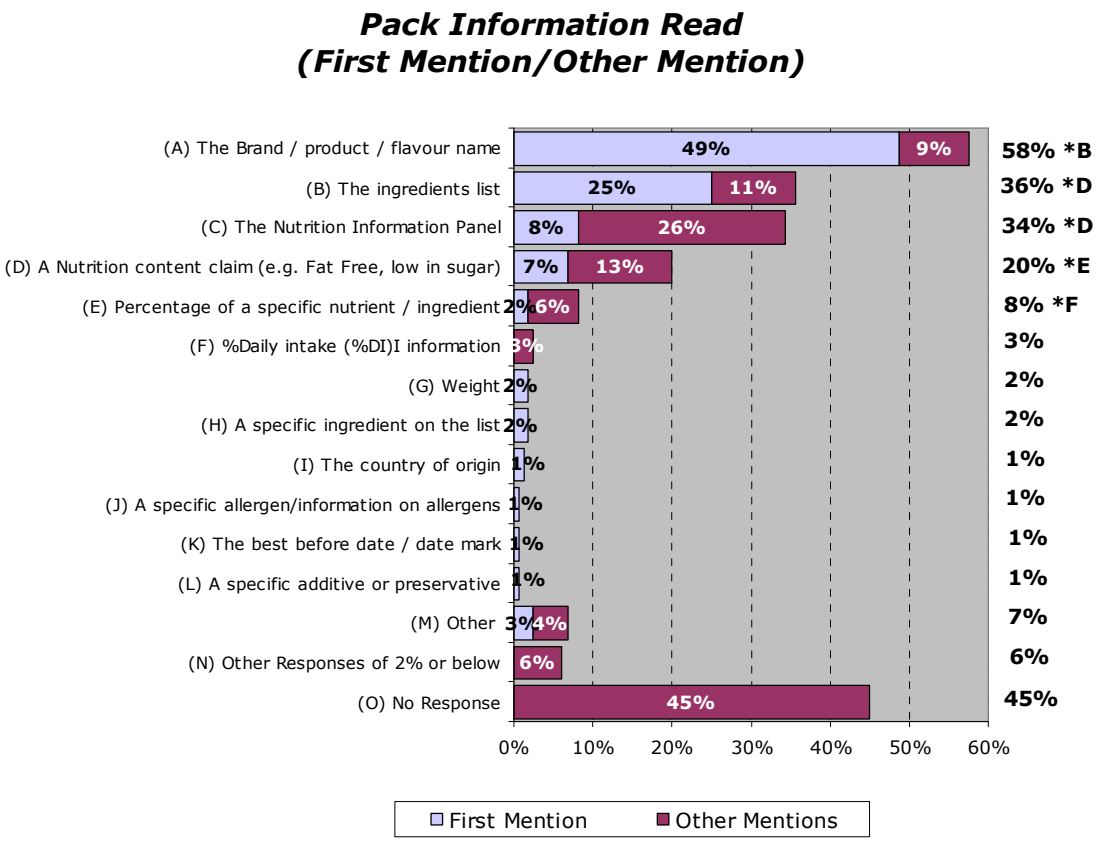
When considering total mentions (i.e. combined first mention and all other mentions from the multiple response question) in this study statistically significantly more shoppers read the nutrition information panel (34%) compared with those who read nutrition content claims (20%).

As seen in Figure 1, just over a third of respondents (34%) claimed to have read the nutrition information panel, (and 8% claimed to read a percentage of a specific nutrient/ingredient which would have also been read from the nutrition information panel). A statistically significantly smaller proportion (20%) claimed to have read a nutrition content claim. Respondents were statistically significantly more likely to mention having read the brand/product or flavour name. They were also statistically significantly more likely to list the ingredients list ahead of a nutrition content claim.

Note – in all analysis relating to on-pack information, respondents were divided into users of the ingredients list in general, and users of a specific ingredient on the list.

Q3, Q12, Q22, I noticed you read or looked at some information on the pack. What information were you looking at on the pack?

Figure 1: On-pack information read (total mentions)



Note: Includes data from n=13 respondents who were classified as 'Not read and bought' but reported reading front of pack information.

As shown in Table 11, statistically significantly more Australian respondents reported reading the nutrition information panel than New Zealand respondents. However, statistically significantly more New Zealand respondents reported reading a specific nutrient or ingredient.

Table 11: On-pack information read (total mentions), by country

	(A) Australia n=113	(B) New Zealand n=47
The Brand/product/flavour name	60%	51%
The ingredients list	37%	32%
A specific ingredient on the list	4%	9%
A specific additive or preservative	1%	6%
The nutrition information panel	43%[B]	15%[A]
Percentage of a specific nutrient/ingredient	4%[B]	19%[A]
A nutrition content claim (e.g. Fat Free, low in sugar)	21%	17%
Other	14%	25%

Notes:

- Table 11 presents multiple response sets
- 'Other' response represents grouped responses due to small sample sizes, and includes best before date, manufacturer details, country of origin, a specific allergen, % daily intake information, novel foods, and weight of food.

Table 12 displays a series of significant differences between socio-demographic variables and on-pack information read. Respondents aged 41 years and over were significantly more likely to read the nutrition information panel, than those aged 18-40 years. Low income earners were significantly more likely to read the percentage of a specific nutrient/ingredient than high income earners and those with high school education only were also significantly more likely to read the percentage of a specific nutrient/ingredient than those with higher education. Respondents with higher education were significantly more likely to read the brand name/product and flavour name than those with high school education.

Table 12: On-pack information read (total mentions), by gender, age, income and education level splits

	(A) Male	(B) Female	(A) 18-40 years	(B) 41 years and over	(A) Low income	(B) High Income	(C) did not answer	(A) High school	(B) Higher education
	49	**111**	**84**	**76**	**55**	**65**	**40**	**60**	**95**
The Brand / product / flavour name	57%	58%	59%	55%	62%	49%	65%	47%^{B}	67%^{A}
The ingredients list	33%	37%	36%	36%	33%	34%	42%	34%	36%
A specific ingredient on the list	6%	5%	6%	5%	5%	8%	2%	8%	4%
A specific additive or preservative	4%	2%	2%	3%	4%	2%	3%	2%	3%
The Nutrition Information Panel	24%	39%	27%^{B}	42%^{A}	42%	34%	25%	35%	36%
Percentage of a specific nutrient / ingredient	8%	8%	6%	11%	18%^{B}	5%^{A}	0%	16%^{B}	3%^{A}
A Nutrition content claim (e.g. Fat Free, low in sugar)	20%	20%	20%	20%	18%	20%	22%	28%	15%
Other	16%	18%	15%	18%	25%	15%	14%	15%	18%

Notes:

- Table 11 presents multiple response sets
- Respondents who did not answer education question (n=2) have been removed
- 'Other' response represents grouped responses due to small sample sizes, and includes best before date, manufacturer details, country of origin, a specific allergen, % daily intake information, novel foods, and weight of food.

Table 13 shows that respondents with specific health concerns or general dietary concerns were significantly more likely to read the nutrition information panel compared to those with no health concerns.

Table 13: On-pack information read (total mentions), by dependents, health concerns and attention paid to diet splits

	Dependents		Health			Attention paid to healthy diet
	(A) Dependents	(B) No dependents	(A) Specific health concern	(B) General dietary concern	(C) No concern	Average Score
	66	**94**	**72**	**106**	**40**	**160**
The Brand / product / flavour name	62%	54%	57%	57%	65%	3.7
The ingredients list	32%	38%	36%	34%	37%	3.9
A specific ingredient on the list	5%	6%	7%	8%	0%	4.0
A specific additive or preservative	3%	2%	1%	4%	0%	3.8
The Nutrition Information Panel	27%	39%	39%^{C}	45%^{C}	8%^{AB}	4.1
Percentage of a specific nutrient / ingredient	12%	5%	14%	9%	0%	3.8
A nutrition content claim (e.g. Fat Free, low in sugar)	15%	23%	22%	22%	10%	4.1
Other	26%	11%	19%	18%	19%	3.9

Notes:

- Table 13 presents multiple response sets.
- 'Other' response represents grouped responses due to small sample sizes, and includes best before date, manufacturer details, country of origin, a specific allergen, % daily intake information, novel foods, and weight of food.

A large majority (92%) of the small number (n=13) respondents who selected a product without pausing or picking the packaging off the shelf ('not read and bought' category) reported reading information on the product. This group reported reading the brand/product or flavour name significantly more than those in the 'read and bought' category). In addition, respondents who read and bought a product, were significantly more likely to read the percentage of a specific nutrient/ingredient, than those who read but did not buy a product.

Table 14: Pack information read (total mentions), by observed in-store behaviour

Base: N=	A Read & bought 74	B Read & not bought 73	C Not Read & bought 13
The brand/product/flavour name	51%	58%	92% A
The ingredients list	32%	45%	0%
The Nutrition Information Panel	43%	32%	0%
A nutrition content claim (e.g. Fat Free, low in sugar)	26%	14%	23%
Percentage of a specific nutrient / ingredient	15% B	3%	0%
A specific ingredient on the list	8%	4%	0%
A specific additive or preservative	4%	1%	0%
Other	18%	14%	16%

Notes:

- Table 14 presents multiple response sets.
- 'Read and bought' and 'Read and not bought' = shopper picked up product and appeared to read label
- 'Read and bought' and 'Not read and bought' = shopper put product in baskey/trolley ('Not read and bought' may have involved reading of front of product package)
- 'Other' response represents grouped responses due to small sample sizes, and includes best before date, manufacturer details, country of origin, a specific allergen, % daily intake information, novel foods, and weight of food.

As shown in Table 15, breakfast cereal shoppers were significantly more likely to read the ingredients list than muesli bar shoppers; muesli bar shoppers were significantly more likely to read the brand/product/flavour name than breakfast cereal shoppers.

The incidence of reading nutrition content claims was close to even across the categories.

Table 15: On-pack information read (total mentions), by category shopped

Base: N=	(A) Cereal 78	(B) Muesli Bar 82
The brand/product/flavour name	44%	71% A
The ingredients list	44% B	28%
A specific ingredient on the list	5%	6%
A specific additive or preservative	1%	4%
The Nutrition Information Panel	28%	40%
Percentage of a specific nutrient/ingredient	6%	10%
A nutrition content claim (e.g. Fat Free, low in sugar)	19%	21%
Other	23%	10%

Notes:

- Table 15 presents multiple response sets
- 'Other' response represents grouped responses due to small sample sizes, and includes best before date, manufacturer details, country of origin, a specific allergen, % daily intake information, novel foods, and weight of food.

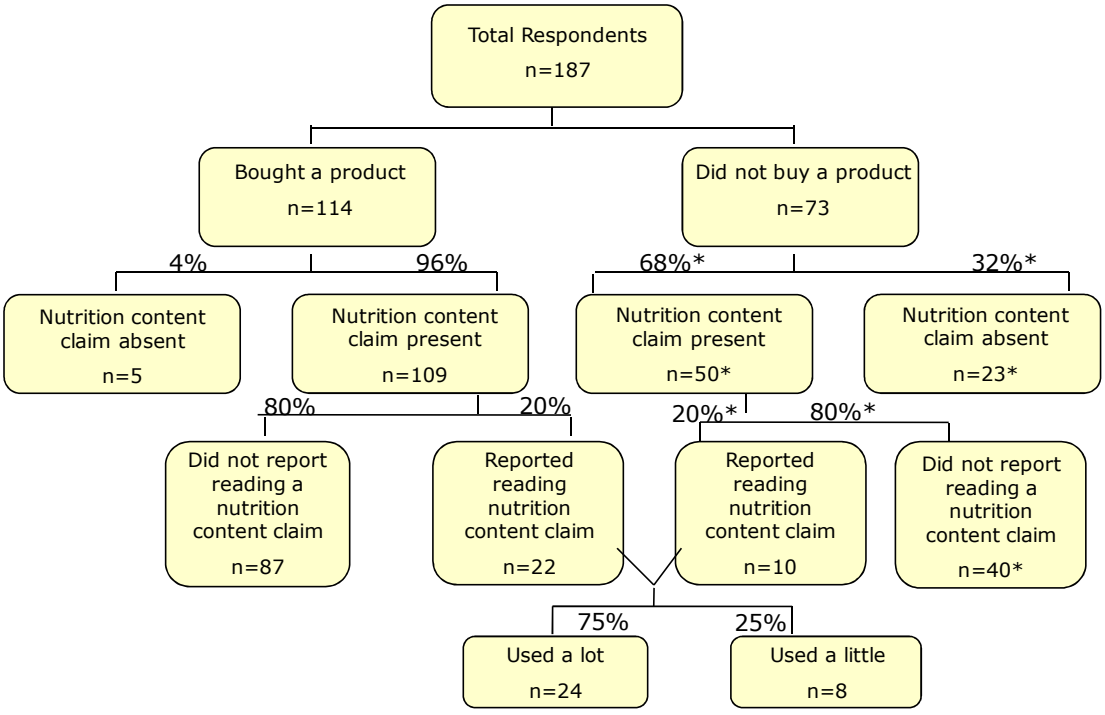
4.2.2 Use of on-pack information in purchase decisions

Respondents were asked if they used the information they had read on labels in their decision to buy or not to buy the product, and the extent of this use. It should be noted that the number of respondents who read a nutrition content claim was low (n=32), as shown in Diagram 1.

Diagram 1 below shows the purchase behaviour of breakfast cereal and muesli bar products of the total number of respondents interviewed, and the presence of a nutrition content claim on the product label. For respondents who purchased or did not purchase a product *with* a nutrition content claim, the diagram shows the incidence of reading the claim. Data was not collected for products not purchased, therefore percentages are based on estimates of presence of claims on these types of products (breakfast cereals/cereal products (including muesli bar products)) derived on the basis of findings from the most recent label monitoring survey conducted for FSANZ[5].

Results revealed that 80% of respondents reported not reading a claim on products where a claim was present on the label.

Diagram 1: Proportion of respondents reading a nutrition content claim, showing respondent purchase decision and number of products with and without nutrition content claims



*Percentage/number based on estimates of nutrition content claim presence on cereals/cereal products from the Report on the Assessment of 2005 Labels of Nutrition, Health and Related Claims (FSANZ, 2007). Nutrition content claims were present on 68% of cereals/cereal products

[5] AgriQuality Australia 2007, *Ongoing Food Label Monitoring Survey in Australia and New Zealand: Report on the Assessment of 2005 Labels for Nutrition, Health and Related Claims. (Evaluation Report Series No 16),* FSANZ, Canberra.

It should be noted that in this study the number of products with nutrition content claims is larger than what was found in the label monitoring survey. This may well indicate a positive bias in shoppers when selecting and purchasing products with nutrition content claims without necessarily reading and/or using these claims to make a decision. Other differences between the two studies may also contribute to a positive bias. For example this study was limited to focus on two categories only, breakfast cereals and muesli bars. Differences in the frequency of nutrition content claims in these categories compared to others included in the label monitoring survey may have also had an influence.

A list of nutrition content claims that were actually present on the products purchased is shown in Table 16.

Table 16: List of claims present on products purchased

Claims on packs of bought cereal	Claims on packs of bought Muesli Bars
Fibre rich wheat bran	High in fibre
Added iron and vitamins	low in salt
Source of B vitamins	Source of fibre
Source of iron	low in fat
High in carbohydrate/High carbohydrate	Low in sodium
Low in fat /Low fat	97% fat free
Source of Zinc	Source of Energy
Source Of Calcium	The goodness of puffed rice
Good source of Iron	Less than 2 grams of fat per bar
Good source of 5 Vitamins Including folate	Helps provide energy
Good source of iron, (needed to help carry oxygen around the body)*	Excellent source of fibre
Vitamin C (helps the body absorb the iron)*	High in protein
Helps provide energy for active people/helps provide energy	no added salt
A good source of fibre	Gluten free
Good source of Iron.(Needed to help carry oxygen around the body for daily activity)*	99% fat free
B1,B2 & Niacin (helps release energy from food)*	Source of protein
Goodness of wholegrains	Carbo loaded
99% Fat Free	Energy snack bars
Good source of Calcium	(Made with wholegrain oats and wheat)*
A good source of protein which is essential for a balanced diet	Less than 3g fat per bar
Very high in fibre	
Goodness of 4 wholegrains	
(20% wholegrain)*	
Carbo fuel	
B vitamins	
Iron	
Zinc	
Good source of carbohydrates	
(Wholegrain cereal/Wholegrain)*	
No added salt	
No added sugar	
High in fibre	
Source of fibre	
98% fat-free	
25% of your daily calcium needs	
Folate and iron	
Contains 4 essential vitamins (Thiamin (B1), Riboflavin (B2), Niacin (B3), folate) as well as iron	
High Carbonydrates, (carbonydrates give you the energy you need to keep going all morning) *	
High Dietary Fibre	
Natural source of fibre	
Low in Sugar	
Only 1g of sugar per serve	
Natural source of vitamins	
97% fat free	
High in protein	
High in iron and B group vitamins	
(100% wholegrain oats)*	
rich in beta-glucan	
Good source of iron & magnesium,	
Magnesium helps provide energy	
Iron (help carry oxygen around the body)*	
B1, B2 & Niacin help release energy from food	
Source of natural fibre	
Carbohydrates (are the preferred source of energy for your body. They fuel & sustain working muscles & brain cells)*	
(99% wholegrain cerea)*	
The B group vitamins (in wholegrains are also essential for releasing this energy from carbohydrates & help maximise performance)*	

Note: From a regulatory perspective, these statements may or may not be nutrition content claims depending on the context in which they are presented. For the purposes of this research, FSANZ considers that consumers may associate these statements with a nutrition or health purpose and are therefore included as nutrition content claims.

Of the consumers who did use a nutrition content claim, the majority were female, and had no dependents (see Table 17).

Table 17: Demographics of respondents who did and did not use a nutrition content claim

Base: n=		NUTRITION CONTENT CLAIM	
		(A) READ/USED N=32	(B) DID NOT READ/USE N=155
AGE			
(A) 18-40 years	n=92	53%	48%
(B) 41 years and older	n=95	47%	52%
GENDER			
(A) Males	n=56	31%	30%
(B) Females	n=131	69%	70%
INCOME			
(A) Low income	n=62	31%	34%
(B) High income	n=77	41%	41%
Prefer not to answer	n=48	28%	25%
HOUSEHOLD			
(A) Dependents	n=81	31%	46%
(B) No Dependents	n=106	69%	54%
EDUCATION			
(A) High School	n=72	53%	36%
(B) Higher Education	n=109	44%	63%
HEALTH CONCERN			
(A) Specific health concern	n=90	50%	39%
(B) General dietary concern	n=105	72%	63%
(C) No concern	n=50	13%	30%
ATTENTION TO HEALTHY DIET (mean score out of 5)	n=187	4.1	3.8

Notes:

- Results are based on Pearson Chi-Square Tests with significance level 0.05 where distributions of columns are compared.
- Health concerns question is a multiple response question.

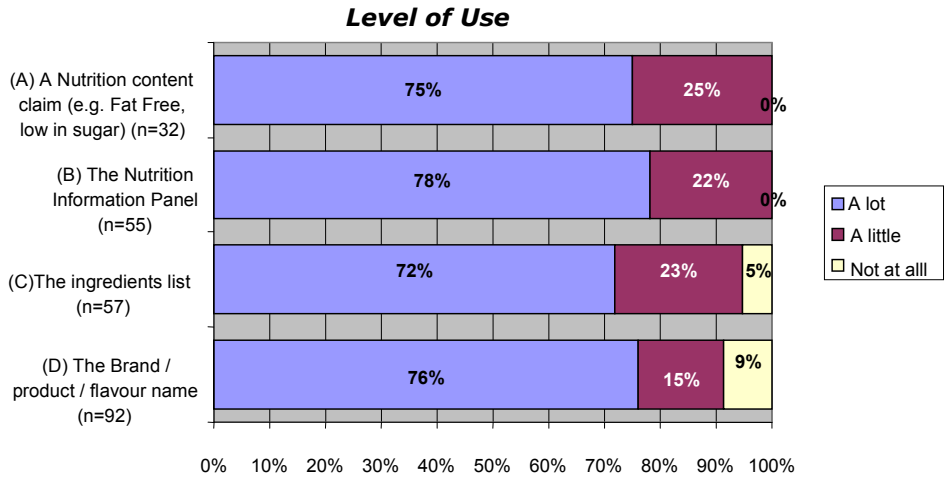
4.2.3 Level of use of on-pack information

As seen in Figure 2 below, the four pieces of information that were mostly frequently read by respondents (nutrition content claims, nutrition information panel, ingredients list and brand/product/flavour name) were mainly used 'a lot' or 'a little' in respondents' purchase decisions.

The data suggests nutrition content claims are on par with the nutrition information panel in terms of level of use. All respondents who read either the nutrition information panel or a nutrition content claim reported using it to some degree in their purchase decision.

Q4, Q13, Q23, I'm interested to know if any of the information you read was used in your decision to buy the product. You said you looked at …. Did you use this in your decision to buy the product, a lot, a little or not at all?

Figure 2: Level of use of on-pack information



Tables 20 and 20a show there were no statistically significant differences in the level of use of nutrition content claims between categories of key socio-demographic and personal variables.

Table 20: Level of use of nutrition content claim, by gender, age and income splits

	Gender		Age		Income		
	Male	Female	18-40 years	41 years and over	(A) Low income	(B) High Income	(C) did not answer
	10	**22**	**17**	**15**	**10**	**13**	**9**
A lot	80%	73%	59%	93%	80%	85%	56%
A Little	20%	27%	41%	7%	20%	15%	44%

Table 20a: Level of use of nutrition content claim, by education level, dependents, health concerns and attention to diet splits

	Education		Dependents		Health			Attention paid to healthy diet
	(A) High school	(B) Higher education	Dependents	No dependents	(A) Specific health concern	(B) General dietary concern	(C) No concern	Average Score
	17	**14**	**10**	**22**	**16**	**23**	**4**	**32**
A lot	71%	79%	90%	68%	63%	74%	100%	4.1
A Little	29%	21%	10%	32%	38%	26%	0%	4.3

If respondents indicated that a nutrition content claim was used in their purchase decision (n=32), then this was explored in more detail to understand exactly why.

Shoppers reported they generally used nutrition content claims as a quick health check to confirm purchase decision, with the majority of respondents who read a nutrition content claim going on to purchase the product. For respondents who purchased the product after reading the claim, their interest mainly concerned sugar, kilojoules, energy or fat content.

Example Verbatim Comments

"Want something that is low in fat but still needs to taste good. I always check the nutrition claims"

If respondents indicated that they used the nutrition information panel their purchase decision (n=55), then this was explored in more detail to understand exactly why.

Again, consistent with earlier findings, sugar and fat levels were mentioned as a main concern, with the majority of respondents who were asked this question mentioning looking for the amount of sugar and/or fat content.

Example Verbatim Comments

"To see the fat content for weight control"

"Trying to be careful what I eat. Not too much sugar or carbs. I need to see what is in it"

Some respondents were concerned with the nutrition information because they were making a purchase decision for their children (14%). A smaller percentage of respondents mentioned specific dietary requirements or health needs (11%).

Example Verbatim Comments

"Because diabetic - need a product with less sugar - this particular product has 11gms"

"Want to know combination so I have a balanced breakfast"

Overall approximately one third (n=12) of respondents interviewed who used a nutrition content claim in the purchase decision claimed that they also used both the nutrition information panel. These respondents reported using both pieces of information as they were sceptical about the truth behind the nutrition content claim.

For respondents who read a nutrition content claim, but did not purchase the product, they were found to be generally using the claim as an easy way to compare products or analysing claims in conjunction with the nutrition information panel or ingredients list.

Example Verbatim Comments

"Need to see at a glance and then I check the ingredients list"

"To compare the sugar content and the claims on each brand"

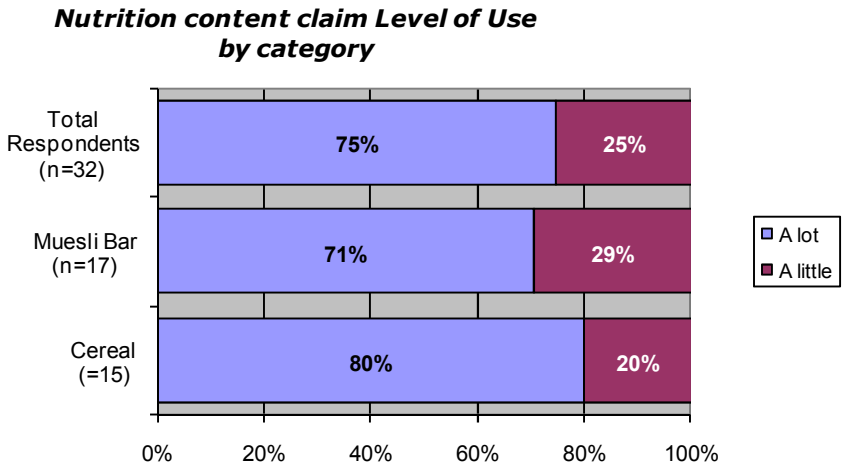
Example Verbatim Comments

"Just because it says on pack does not mean it contains the right ingredients"

"Proves what the product say is actually true"

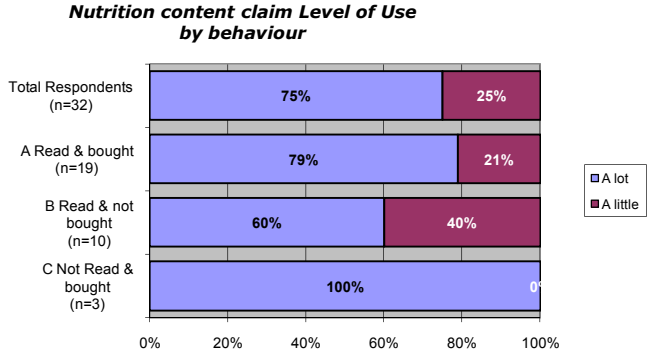
For both the majority of breakfast cereal shoppers and muesli bar shoppers nutrition content claims were used 'a lot'. Interestingly, a greater proportion of muesli bar shoppers said they used the nutrition information panel 'a lot' compared with nutrition content claims (88% of n=33 influenced 'a lot' by nutrition information panel versus 71% of n=17 influenced 'a lot' by nutrition content claims). The opposite was true for breakfast cereal shoppers (64% of n=22 influenced 'a lot' by nutrition information panel versus 80% of n=15 influenced 'a lot' by nutrition content claim). Statistical significance between categories was not tested due to low base sizes. Data is indicative only and should be viewed with caution.

Figure 3: Nutrition content claim level of use *(NB:* Caution – low base sizes, data is indicative only)



Nutrition content claims were more likely to have been used 'a lot' in purchase decisions for shoppers who read the claim and bought the product (79%). For shoppers who read the claim and then did not buy the product, 60% used nutrition content claims 'a lot'. Of the 3 shoppers who did not read the product and bought it, all of them reported using the nutrition content claim 'a lot' in their purchase decision (reading the front of the product was possible for shoppers in this category). Statistical significance between categories not tested due to low base sizes. Data is indicative only and should be viewed with caution.

Figure 4: Nutrition content claim level of use *(NB:* Caution – low base sizes, data is indicative only)



Notes:

- 'Read and bought' and 'Read and not bought' = shopper picked up product and appeared to read label
- 'Read and bought' and 'Not read and bought' = shopper put product in basket/trolley ('Not read and bought' may have involved reading of front of product package)

4.2.3.1 Trust in nutrition content claims

Towards the end of the interview respondents were asked about the level of trust they have for nutrition content claims, regardless of whether they had previously reported reading one on a product.

As shown in Table 18 below, close to half of the respondents reported trusting nutrition content claims 'a lot'. Close to a third reported trusting them 'a little'.

Average level of trust towards nutrition content claims was significantly higher for respondents who used a nutrition content claim compared to those who did not.

Table 18: Respondents level of trust in nutrition content claims by those who read/did not read nutrition content claims claim

Base: n=	Total Respondents 187	NUTRITION CONTENT CLAIM (A) USE 32	NUTRITION CONTENT CLAIM (B) DIDN'T USE 155
Trust a lot	48%	59%	46%
Trust a little	29%	34%	28%
Neither trust nor distrust	14%	6%	16%
Distrust a little	6%	0%	8%
Distrust a lot	2%	0%	3%
MEAN	4.1	4.5 B	4.1

Note: Mean scores for level of trust were measured on a five point category scale where 5=trust a lot; 4=trust a little; 3=neither trust nor distrust; 2=distrust a little;1=distrust a lot.

No significant differences in the level of trust towards nutrition content claims were seen between breakfast cereal and muesli bar categories. In each category very few shoppers distrusted the claims, with the largest proportion of shoppers in each category saying they trusted nutrition content claims 'a lot'.

Table 19: Level of trust in nutrition content claims, by category

Base: n=	(A) CEREAL 93	(B) MUESLI BAR 94
Trust a lot	51%	46%
Trust a little	29%	29%
Neither trust nor distrust	12%	17%
Distrust a little	7%	6%
Distrust a lot	2%	2%
MEAN	4.2	4.1

As shown in Table 19a below the average level of trust in nutrition content claims was statistically significantly higher in New Zealand compared to Australia.

Table 19a: Level of trust, by country

	A Australia n=127	B New Zealand n=60
Trust a lot	54%	75%
Trust a little	42%	13%
Neither trust nor distrust	4%	13%
Distrust a little	0%	0%
Distrust a lot	0%	0%
Average	**4.0**	**4.5 A**

4.2.4 Impact of planning on use of pack information

At the beginning of the survey respondents were asked about their level of planning to purchase a particular product with which they had just been observed interacting. The aim of this question was to create a context for exploring the use and impact of nutrition content claims among shoppers who may have already planned to purchase a specific product.

Table 21 below shows no statistically significant differences between the degree of planning between breakfast cereal purchases and muesli bar purchases.

In both sections, a relatively small proportion of respondents who were interviewed had no level of planning, with over 80% of shoppers planning to some degree which product they would buy before entering the breakfast cereal or muesli bar section.

Q1, Q10, Q19: Which of the following best describes your plans before coming into the store?

Table 21: Degree of planning, by category shopped

Base: N=	Total Respondents	Cereal	Muesli Bar
	187	93	94
I planned to buy that exact product	35%	42%	29%
I planned to buy cereal / muesli bars but did not know the exact product I was going to chose	48%	44%	51%
I did not plan to buy cereal / muesli bars at all today	17%	14%	20%

Data indicated that the stated level of planning prior to shopping did have an impact on respondents' in-store behaviour.

As shown in Table 22, the majority of respondents who read and purchased a product had planned to some degree to buy either a specific product or product type (95%). Similarly, the majority of shoppers who did not read the package and bought the product had planned the purchase to some degree also (91%). This shows that the purchase of a product in this study usually involved some level of planning by the shopper.

The majority of respondents who did not make a purchase but read the pack either did not plan to buy the product, or planned to a small degree to buy the product type without planning an exact product (92%).

Table 22: Degree of planning, by observed in-store behaviour

Base: N=	(A) Read and bought 74	(B) Read and not bought 73	(C) Not Read and bought 40
I planned to buy that exact product	45% [B]	8%[AC]	68% [B]
I planned to buy cereal / muesli bars but did not know the exact product I was going to choose	50%	59% [C]	23%[B]
I did not plan to buy cereal / muesli bars at all today	5%[B]	33% [A]	10%

Notes:

- 'Read and bought' and 'Read and not bought' = shopper picked up product and appeared to read label
- 'Read and bought' and 'Not read and bought' = shopper put product in baskey/trolley ('Not read and bought' may have involved reading of front of product package)

Overall both the ingredients list and nutrition information panel were more likely to be read by respondents who planned to buy in the category, but did not plan a specific product, compared with respondents who had planned their specific purchase.

Shoppers who planned to buy a specific product were statistically significantly less likely to read the nutrition information panel, than respondents who had planned to shop in the category but did not plan to buy a specific product, suggesting a degree of familiarity with the product planned to purchase.

However, interestingly a statistically significantly higher proportion of shoppers who planned to buy a specific product or who had planned to buy in the category read a nutrition content claim, compared with respondents who had not planned their purchase at all. Potentially this is related to the positioning of the claim which is more likely to be front-of-pack, and thus can be read whilst on the shelf, and even when the product is selected quickly.

Table 23: Pack information read, by level of planning (total mentions)

Base: N=	Total	(A) I planned to buy that exact product	(B) I planned to buy cereal / muesli bars but did not know the exact product I was going to	(C) I did not plan to buy cereal / muesli bars at all today
	160	47	84	29
The Brand / product / flavour name	58%	47%	62%	62%
The ingredients list	36%	23%[B]	44%[A]	31%
A specific ingredient on the list	6%	9%	5%	3%
A specific additive or preservative	3%	4%	1%	3%
The Nutrition Information Panel	34%	19%[B]	44% [A]	31%
Percentage of a specific nutrient / ingredient	8%	6%	10%	7%
A Nutrition content claim (e.g. Fat Free, low in sugar)	20%	28%[C]	20%[C]	7%[AB]
The best before date / date mark	2%	4%	0%	3%
The manufacturer details (name , address)	1%	0%	0%	3%
The country of origin	1%	0%	1%	3%
A specific allergen/information on allergens	1%	0%	1%	0%
%Daily intake (%DI)I information (relevant for cereals)	3%	0%	4%	3%
Novel foods	1%	0%	1%	0%
Weight	3%	2%	4%	0%
Other	7%	6%	7%	7%

Note: Table 23 presents multiple responses.

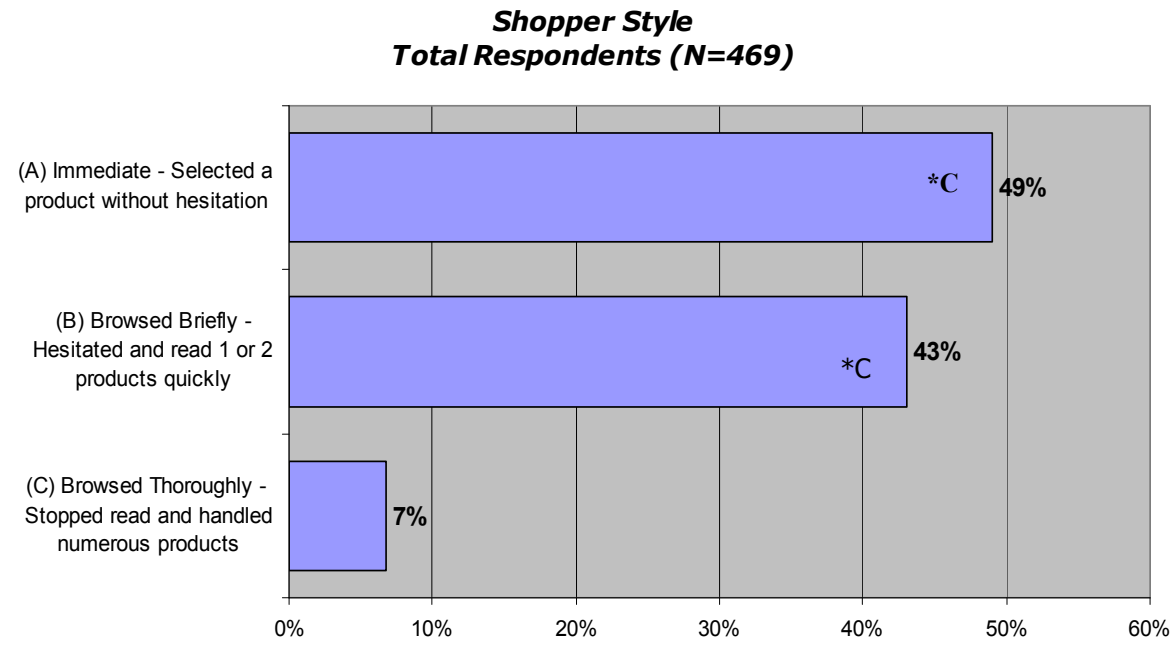
4.3 Shopper styles

During Shopper Behaviour projects of this type shopping style is generally derived from considering several pieces of observed behaviour.

In this study shoppers tended to select products rather quickly. The majority of shoppers observed overall style was either immediate (selected a product without hesitation) or they browsed quickly (hesitating for only 1 or 2 seconds at the fixture before selecting a product). Only 7% of the n=469 respondents being observed stopping to browse thoroughly in the section. (Note: shopper style is based on a subjective observation of how shoppers generally interact with the products. It is not the same as amount of time spent in section which is recorded in seconds from the time the shopper enters the section to the time they exit.)

Note: Respondents who were categorised as 'Other' (n=23) were excluded from analysis.

Figure 5: Shopper style



There some differences observed in shopping style across the two categories. Statistically significantly more shoppers in the muesli bar section were observed to have an immediate (selected a product without hesitation) style, whilst more shoppers in the breakfast cereal section browsed briefly (however, no statistically significant differences were observed). Overall, in both categories very few shoppers browsed thoroughly (i.e. stopped, read and handled numerous products).

Table 24: Shopper style by category shopped

Base: N=	(A) Cereal 87	(B) Muesli Bar 88
Immediate - Selected a product without hesitation	22%[B]	44% [A]
Browsed Briefly - Hesitated and read 1 or 2 products quickly	64%	51%
Browsed Thoroughly - Stopped read and handled numerous products	14% [B]	5%[A]

Respondents who selected a product immediately were significantly less likely to have read / used a nutrition content claim. Respondents who stopped and browsed thoroughly were statistically significantly more likely to read / use a nutrition content claim.

Table 25: Shopper style by use of nutrition content claim

Base: n=	NUTRITON CONTENT CLAIM (A) READ / USED 32	(B) DID NOT READ / USE 109
Immediate - Selected a product without hesitation	25%[B]	43% [A]
Browsed Briefly - Hesitated and read 1 or 2 products quickly	50%	45%
Browsed Thoroughly - Stopped read and handled numerous products	22% [B]	6%[A]

The average time spent in the section overall was 65.7 seconds for Total Respondents (N=492). The average time spent in the breakfast cereal section was 68.8 seconds and 55.5 seconds in the muesli bar section.

Note: the average time spent in section is not the same as shopper style. Average time is timed in seconds from the time of entering the section to exiting the section. Shopper style is observed behaviour applying a general description to behaviour at the product fixture.

Average time in section was slightly longer for shoppers who read / used a nutrition content claim as shown in Table 26 below.

Table 26: Average time in section by use of nutrition content claim

Base: n=	NUTRITON CONTENT CLAIM (A) READ / USED 32	(B) DID NOT READ / USE 109
Average time in section (seconds)	71.5	63.2

Table 27: Average time in section by section

Base: n=	(A) CEREAL 93	(B) MUESLI BAR 94
Average time in section (seconds)	65.4	59.2

5 APPENDIX A: TECHNICAL APPENDIX

5.1 Technical Notes

5.1.1 Sampling

Quotas were set to obtain n=60 in-store interviews in each of the three cities. No strict quotas were set around observations. Interviewers were instructed to observe as many shoppers in the allocated time as possible. A set amount of observed shoppers were then interviewed.

Quotas were achieved. In Sydney and Auckland n=60 shoppers were interviewed, in Melbourne quotas were exceed with N=67 shoppers interviewed. The number of observed shoppers were n=171 in Sydney, n=131 in Melbourne, n=190 in Auckland.

In Sydney and Melbourne no problems with refusal rates were reported. In Auckland there were issues with quite high refusal rates for interviews. The main reason cited for this by the interviewers was that shoppers were in a hurry. Refusal rates were more of an issue on Thursday afternoon than Saturday morning as shoppers were hurrying into the store on their way home from work. (Exact refusal rates were not recorded).

5.1.2 Reporting significant difference

Significant differences have been tested at the 95% confidence interval primarily using Z-tests to explore differences between data splits. Z-tests have been used as they are appropriate for comparing between two means or proportions. Z-tests are essentially the same as T-tests (used when the sample size is over N=30). Analysis was overseen by Colmar Brunton's statistical department.

In the case of multiple data splits, iterative pair wise analyses have been run using Z-tests. In this way a specific understanding of the significant differences between each individual data split can be understood. For example, if exploring the differences between three data sets, Z-tests allow us to identify where significant differences exist between only two of the three sets.

On bar charts and tables where statistically significant differences between two or more categories are reported (e.g. breakfast cereal vs. mueslis bars), text labels and shading has been used to note where statistically significant differences were found. For example each category (e.g. breakfast cereal & muesli bars) is allocated a letter (e.g. (A) Muesli Bars, (B) Breakfast cereal). These are presented at the top of the appropriate column. Statistically significant differences are then reported via placing an either a letter A or B next to the data on the table to demonstrate statistically significant differences. For example, if a letter B is shown on the muesli bar score, then that indicates the muesli bar score is statistically significantly higher than (B) the breakfast cereal score. In each case, the letter is placed on the bar of the significantly higher score.

Shading has also been used to help illustrate significant differences. Throughout the tables blue shading denotes significantly higher score and orange shading a significantly lower score.

5.1.3 Question text

Throughout the report the question that particular data refers to is shown before the first graph/table that relates to that question. The question text is displayed in a box with grey shading. Often in a particular section of the report several graphs/tables may relate to one question. In this case the question is shown before the first graph/table that relates to that question.

6 APPENDIX B: DATA SPLITS FOR KEY VARIABLES

Table 28: Level of trust in nutrition content claims, by gender, age and income splits

	Gender		Age		Income		
	(A) Male	(B) Female	(A) 18-40 years	(B) 41 years and over	(A) Medium -Low income	(B) High Income	(C) did not answer
	55	**132**	**92**	**95**	**62**	**77**	**48**
Trust a lot	53%	46%	43%	53%	57%	47%	40%
Trust a little	24%	32%	33%	26%	23%	33%	32%
Neither trust nor distrust	15%	14%	13%	16%	11%	13%	21%
Distrust a little	8%	5%	8%	4%	6%	7%	4%
Distrust a lot	2%	2%	2%	2%	3%	0%	4%

Table 29: Level of trust in nutrition content claims, by education, dependents, health and attention to diet splits

	Education		Dependents		Health			Attention paid to healthy diet
	(A) High school	(B) Higher education	(A) Dependents	(B) No dependents	(A) Specific health concern	(B) General dietary concern	(C) No concern	Average Score
	72	**109**	**81**	**106**	**77**	**121**	**50**	**187**
Trust a lot	49%	48%	49%	47%	56%	48%	42%	4.0
Trust a little	32%	29%	33%	27%	28%	31%	24%	3.7
Neither trust nor distrust	12%	16%	9%[B]	18%[A]	12%	12%[C]	26%[B]	3.6
Distrust a little	5%	7%	7%	5%	2%	7%	6%	4.0
Distrust a lot	3%	2%	2%	2%	3%	2%	2%	2.7

Table 30: Level of Planning, By Country

	Australia n=127	New Zealand n=60
I planned to buy that exact product	37%	32%
I planned to buy breakfast cereal / muesli bars but did not know the exact product I was going to chose	49%	45%
I did not plan to buy breakfast cereal / muesli bars at all today	14%	23%

Table 31: Level of planning, by socio-demographic splits

	Gender		Age		Income		
	(A) Male	(B) Female	(A) 18-40 years	(B) 41 years and over	(A) Low income	(B) High Income	(C) did not answer
	55	**132**	**92**	**95**	**62**	**77**	**48**
I planned to buy that exact product	36%	35%	27%[B]	43%[A]	27%	36%	44%
I planned to buy cereal / muesli bars but did not know the exact product I was going to chose	44%	49%	52%	43%	52%	49%	42%
I did not plan to buy cereal / muesli bars at all today	22%	15%	21%	14%	21%	16%	15%

Table 32: Level of planning, by education, dependents, health concerns and attention to diet splits

	Education		Dependents		Health			Attention paid to healthy diet
	(A) High school	(B) Higher education	(A) Dependents	(B) No dependents	(A) Specific health concern	(B) General dietary concern	(C) No concern	Average Score
	72	**109**	**81**	**106**	**77**	**121**	**50**	**187**
I planned to buy that exact product	39%	33%	32%	38%	25%[C]	32%	44%[A]	3.9
I planned to buy cereal / muesli bars but did not know the exact product I was going to chose	48%	50%	51%	45%	54%	49%	42%	3.8
I did not plan to buy cereal / muesli bars at all today	15%	19%	17%	17%	21%	19%	14%	3.8

Note: Respondents who did not answer education question (n=3) have been removed.

7 APPENDIX C: RESPONDENT DEMOGRAPHICS

Table 33: Respondents demographics, by country

Demographics :	Australia N=127	New Zealand N=60
AGE		
Aged 18-40 years	45%	58%
Aged 41 years and older	55%	42%
GENDER		
Males interviewed	27%	35%
Females interviewed	73%	65%
INCOME		
Medium to low income	28%[B]	43%[A]
High income	37%	50%
Prefer not to answer	35%[B]	7%[A]
HOUSEHOLD		
Dependents	34%[B]	63%[A]
No Dependents	66%[B]	37%[A]
EDUCATION		
High School or lower	39%	43%
Post High School	60%	55%
Prefer not to answer	1%	2%
HEALTH CONCERN		
No Health Concerns	25%	30%
General Health Concerns	100%	98%
Specific Health Concern	62%	57%
ATTENTION TO HEALTHY DIET (mean score out of 5)	4.0	3.6

8 APPENDIX D: REFERENCE LIST

Food Standards Australia New Zealand, (2007). *Food Labelling Issues: On-going Food Label Monitoring Survey in Australia and New Zealand. Report on the Assessment of 2005 Labels for Nutrition, Health and Related Claims.* Canberra: FSANZ. Evaluation Report Series No. 16.

9 APPENDIX E: INTERVIEW QUESTIONNAIRE

INTRODUCTION

Good morning / afternoon / evening. My name is [INTERVIEWER] from Colmar Brunton, the market research company.

We are talking to people about shopping in the BREAKFAST CEREAL / MUESLI BAR section of the supermarket, and I notice you have just been shopping in this section. Do you have about 5 minutes to answer a few questions? You will receive $5 thank you for giving up your time and helping us with the project.

Colmar Brunton is bound by the requirements of the Privacy Act and the Market & Social Research Code of Professional Behaviour. If you choose to participate, the information and opinions you provide will be used only for research purposes. In particular, no individual responses will be reported this research; they will be combined with those from other participants of this research and your identity will not be revealed.

Q1INTRO: Are you interested in participating? (READ)

1. Yes

2. No

IF 2 IN Q1INTRO ABORT

IF 1 IN Q1INTRO CONTINUE

NOTE to Interviewer : Record details

RESPONDENT DETAILS

Interview #: **Tracker #:**	
Section : 1. Breakfast cereal / 2. Muesli Bar	
Gender : 1. M / 2. F	**CHECK QUOTAS**
Age (approx) : 1. 18-34 / 2. 35+	**CHECK QUOTAS**
Alone / Not Alone: 1. Alone / 2. Not	**CHECK QUOTAS**
Behaviour: 1. Read (picked up pack) then bought 2. Read (picked up pack) but did NOT buy **3.** Bought but did NOT pick up and read)	**CHECK QUOTAS ⇨ GO TO Section A (P5)** **CHECK QUOTAS ⇨ GO TO Section B (P11)** **CHECK QUOTAS ⇨ GO TO Section C (P17)**
QDET1. If 'bought' a product record (ONE) of the bought products to discuss during the interview TYPE: BRAND NAME : NAME OF PRODUCT : FLAVOUR : (ensure consistency with track	cereal / muesli bars _____ _____ _____

SECTION A:

NOTE to Interviewer

Use this section when interviewing respondents who READ THE PACK (picked it up to read) and then BOUGHT THE PRODUCT

1. Which of the following statements best describes your plans, before coming into the store?

(READ) (SR)

I planned to buy that exact product	1
I planned to buy cereal / muesli bars but did not know the exact product I was going to chose	2
I did not plan to buy cereal / muesli bars at all today	3

2.a. So what made you choose that particular cereal / muesli bars today?

(DO NOT READ - FULLY PROBE ; Anything else? Ask details to code correctly) (MR)

Product Feature (e.g. flavour)	1	Skip to Q3
Price	2	
Brand	3	
General health reasons (e.g. healthy / good for you)	4	Ask Q2b
Specific health reasons (e.g. food allergy / medical reasons / digestive concerns)	5	
Helps me control my weight	6	
Contains natural ingredients	7	
Others in family / household want it / Influence from others	8	Skip to Q3
Is what I (or my family) usually eat(s)	9	
Just saw it and wanted it	10	
Influence from other/s	11	
Is easily available in shops / supermarkets	12	

Is Australian-made	13	
Cheers me up / makes me feel good	14	
Other (Please Specify:)	15	

NOTE to Interviewer : Ask Q2b for those who answered '4', '5', '6' or '7' for Q2a

2.b. What specifically made you think the product was suitable for you / your family? **(FULLY PROBE; why do you say that? Can you explain that a bit more to me? Anything else?)**

3. I noticed you read or looked at some information on the pack. What information were you looking at on the pack? **(SHOW PACK AS A REFERENCE)**

(DO NOT READ - FULLY PROBE; Anything else? Ask details to code correctly)

	1st Mention (SR)	**Other Mentions (MR)**
The Brand / product / flavour name	1	1
The ingredients list	2	2
A specific ingredient on the list	3	3

A specific additive or preservative	4	4
The nutrition information panel	5	5
Percentage of a specific nutrient / ingredient	6	6
A Nutrition content claim (e.g. Fat Free, low in sugar)	7	7
The best before date / date mark	8	8
The manufacturer details (name , address)	9	9
Usage / storage Instructions	10	10
The country of origin	11	11
Genetically Modified / irradiated food	12	12
A specific allergen/information on allergens	13	13
%Daily intake (%DI)I information (relevant for cereals)	14	14
Advisory /warning statement	15	15
Endorsement	16	16
Novel foods	17	17
Weight	18	18
Other (Please Specify) :	19	19

4. I'm interested to know if any of the information you read was used in your decision to buy the product. You said you looked at **[READ FIRST ITEM SELECTED AT Q3].**

a. Did you use this in your decision to buy the product, a lot, a little or not at all?

[REPEAT FOR ALL OTHER ITEMS SELECTED AT Q3]

	RECORD Q3 RESPONSES (MR)	**A lot**	**A little**	**Not at all**
The Brand / product / flavour name	1	1	2	3
The ingredients list	2	1	2	3
A specific ingredient on the list	3	1	2	3
A specific additive or preservative	4	1	2	3
The nutrition information panel	5	1	2	3
Percentage of a specific nutrient / ingredient	6	1	2	3
A Nutrition content claim (e.g. Fat Free, low in sugar)	7	1	2	3
The best before date / date mark	8	1	2	3
The manufacturer details (name , address)	9	1	2	3
Usage / storage Instructions	10	1	2	3
The country of origin	11	1	2	3
Genetically Modified / irradiated food	12	1	2	3
A specific allergen/information on allergens	13	1	2	3
%Daily intake (%DI)I information (relevant for cereals)	14	1	2	3

Advisory /warning statement	15	1	2	3
Endorsement	16	1	2	3
Novel foods	17	1	2	3
Weight	18	1	2	3
Other (Please Specify) :	19	1	2	3

NOTE to Interviewer : Go to Q9 for those who did **not** select '5' or '7' in Q4a or selected '5' or '7' – 'not at all'

NOTE to Interviewer : Ask Q5 for those who selected '5' – 'a lot' or 'a little' (and NOT '7') in Q4a

5. You said that you used the nutrition information panel in making your decision. Why did you use this piece of information? **(FULLY PROBE; why do you say that? Can you explain that a bit more to me? Anything else?)**

NOTE to Interviewer : Ask Q6 for those who selected '7' – 'a lot' or 'a little' (and NOT '5') in Q4a

6.a. You said that you used a nutrition claim (e.g. fat free, low in sugar) in making your decision. Why did you use this piece of information ? **(FULLY PROBE; why do you say that? Can you explain that a bit more to me? Anything else?)**

b. Record the claim/s itself where possible E.g. "Low in fat"	

NOTE to Interviewer : Ask Q7 for those who selected **both** '5' **and** '7' – 'a lot' or 'a little' in Q4a

7. You said that you used both a nutrition claim (e.g. fat free, low in sugar) AND the nutrition information panel in making your decision. Why did you use both pieces of information ? **(FULLY PROBE; why do you say that? Can you explain that a bit more to me? Anything else?)**

b. Record the claim/s itself where possible E.g. "Low in fat"	

NOTE to Interviewer : All to Go to Q8

8. Overall, how much do you **TRUST** the information presented in nutrition claims on packs (e.g. % Fat Free, High in fibre, Reduced sugar)

(READ) (SR)

Trust a lot	1
Trust a little	2
Neither trust nor distrust	3
Distrust a little	4
Distrust a lot	5

NOTE to Interviewer : All to Go to SECTION D except for those that did **not** select '7' in Q4a, or selected '7' – 'not at all'

NOTE to Interviewer : Ask Q9 for those who did **not** select '7' in Q4a, or selected '7' – 'not at all'

9. You told me you didn't use a nutrition claim on the pack, but I'm interested in getting your opinion of these types of claims now.

(**USE PACK TO POINT OUT A NUTRITION CONTENT CLAIM.)**

Overall, how much do you **TRUST** the information presented in nutrition claims on packs (e.g. Fat Free, Low in sugar)

(READ) (SR)

Trust a lot	1
Trust a little	2
Neither trust nor distrust	3
Distrust a little	4
Distrust a lot	5

NOTE to Interviewer : All to Go to SECTION D

SECTION B:

NOTE to Interviewer

Use this section when interviewing respondents who READ THE PACK (picked it up to read) and then DID NOT BUY THE PRODUCT

10. I noticed you looked at the package of this product, but did not end up buying the product. Which of the following statements best describes your plans, before coming into the store?

(READ) (SR)

I planned to buy that exact product	1
I planned to buy cereal / muesli bars but did not know the exact product I was going to chose	2
I did not plan to buy cereal / muesli bars at all today	3

11.a. I noticed you read the pack of this product, but did not end up buying the product.

(SHOW PACK AS REFERENCE)

Why did you <u>not</u> buy the product?

(DO NOT READ - FULLY PROBE ; Anything else? Ask details to code correctly) (MR)

Product Feature (e.g. flavour)	1	Skip to Q12
Price (e.g. too expensive)	2	
Brand (e.g. prefer another brand)	3	
General health concerns (e.g. not healthy / not good for you)	4	Ask Q11b
Specific health concerns (e.g. food allergy / medical reasons / digestive concerns)	5	
Weight concerns	6	
No natural ingredients	7	
Others in family / household prefer other products	8	Skip to Q12
Not what I (or my family) usually eat(s)	9	

Not easily available in shops / supermarkets	10	
Not Australian-made	11	
Doesn't make me feel good	12	
Other (Please Specify:)	13	

NOTE to Interviewer : Ask Q11b for those who answered '4', '5', '6' or '7' for Q11a

11.b. What specifically made you think the product was not suitable for you / your family? **(FULLY PROBE; why do you say that? Can you explain that a bit more to me? Anything else?)**

_____

_____

_____

NOTE to Interviewer : All to go to Q12

12. I noticed, you read or looked at some information on the pack. What information were you looking at on the pack? **(SHOW PACK AS A REFERENCE)**

(DO NOT READ - FULLY PROBE; Anything else? Ask details to code correctly)

	1st Mention (SR)	**Other Mentions (MR)**
The Brand / product / flavour name	1	1
The ingredients list	2	2
A specific ingredient on the list	3	3
A specific additive or preservative	4	4
The nutrition information panel	5	5
Percentage of a specific nutrient / ingredient	6	6
A Nutrition content claim (e.g. Fat Free, low in sugar)	7	7
The best before date / date mark	8	8
The manufacturer details (name , address)	9	9
Usage / storage Instructions	10	10
The country of origin	11	11
Genetically Modified / irradiated food	12	12
A specific allergen/information on allergens	13	13
%Daily intake (%DI)I information (relevant for cereals)	14	14
Advisory /warning statement	15	15

Endorsement	16	16
Novel foods	17	17
Weight	18	18
Other (Please Specify) :	19	19

13. I'm interested to know if any of the information you read was used in your decision **not** to buy the product. You said you looked at **[READ FIRST ITEM SELECTED AT Q12].**

a. Did you use this in your decision NOT to buy the product, a lot, a little or not at all?

[REPEAT FOR ALL OTHER ITEMS SELECTED AT Q12]

	RECORD Q12 RESPONSES (MR)	**A lot**	**A little**	**Not at all**
The Brand / product / flavour name	1	1	2	3
The ingredients list	2	1	2	3
A specific ingredient on the list	3	1	2	3
A specific additive or preservative	4	1	2	3
The nutrition information panel	5	1	2	3
Percentage of a specific nutrient / ingredient	6	1	2	3
A Nutrition content claim (e.g. Fat Free, low in sugar)	7	1	2	3
The best before date / date mark	8	1	2	3

The manufacturer details (name , address)	9	1	2	3
Usage / storage Instructions	10	1	2	3
The country of origin	11	1	2	3
Genetically Modified / irradiated food	12	1	2	3
A specific allergen/information on allergens	13	1	2	3
%Daily intake (%DI)I information (relevant for cereals)	14	1	2	3
Advisory /warning statement	15	1	2	3
Endorsement	16	1	2	3
Novel foods	17	1	2	3
Weight	18	1	2	3
Other (Please Specify) :	19	1	2	3

NOTE to Interviewer : Go to Q18 for those who did **not** select '5' or '7' in Q13a or selected '5' or '7' – 'not at all'

NOTE to Interviewer : Ask Q14 for those who selected '5' – 'a lot' or 'a little' (and NOT '7') in Q13a

14. You said that you used a nutrition information panel in making your decision. Why did you use this piece of information? **(FULLY PROBE; why do you say that? Can you explain that a bit more to me? Anything else?)**

NOTE to Interviewer : Ask Q15 for those who selected '7' – 'a lot' or 'a little' (and NOT '5') in Q13a

15. You said that you used a nutrition claim (e.g. fat free, low in sugar) in making your decision. Why did you use this piece of information ? **(FULLY PROBE; why do you say that? Can you explain that a bit more to me? Anything else?)**

b. Record the claim itself where possible E.g. "Low in fat"	

NOTE to Interviewer : Ask Q16 for those who selected **both** '5' **and** '7' – 'a lot' or 'a little' in Q13a

16. You said that you looked at both a nutrition claim (e.g. fat free, low in sugar) AND the nutrition information panel. Why did you look at both pieces of information? **(FULLY PROBE; why do you say that? Can you explain that a bit more to me? Anything else?)**

b. Record the claim itself where possible E.g. "Low in fat"	

NOTE to Interviewer : All to Go to Q17

17. Overall, how much do you **TRUST** the information presented in nutrition claims on packs (e.g. Fat Free, Low in sugar)

(READ) (SR)

Trust a lot	1
Trust a little	2
Neither trust nor distrust	3
Distrust a little	4
Distrust a lot	5

NOTE to Interviewer : All to Go to SECTION D except for those that did **not** select '7' in Q13a, or selected '7' – 'not at all'

NOTE to Interviewer : Ask Q18 for those who did not select '7' in Q13a, or selected '7' – 'not at all'

18. You told me you didn't read a nutrition claim on the pack, but I'm interested in getting your opinion of these sorts of claims now.

(**USE PACK TO POINT OUT A NUTRITION CONTENT CLAIM).**

Overall, how much do you TRUST the information presented in nutrition claims on packs (e.g. Fat Free, Low in sugar)

(READ) (SR)

Trust a lot	1
Trust a little	2
Neither trust nor distrust	3
Distrust a little	4
Distrust a lot	5

NOTE to Interviewer : All to Go to SECTION D

SECTION C:

NOTE to Interviewer

Use this section when interviewing respondents who DID NOT pick up the pack to read first but BOUGHT A PRODUCT

19. I noticed you selected that particular cereal / those particular muesli bars today. Which of the following statements best describes your plans, before coming into the store?

(READ) (SR)

I planned to buy that exact product	1
I planned to buy cereal / muesli bars but did not know the exact product I was going to chose	2
I did not plan to buy cereal / muesli bars at all today	3

20.a. So what made you choose that particular cereal / those particular muesli bars today?

(DO NOT READ - FULLY PROBE; Anything else? Ask details to code correctly) (MR)

Product Feature (e.g. flavour)	1	Skip to Q21
Price	2	
Brand	3	
General health reasons (e.g. healthy / good for you)	4	Ask Q20b
Specific health reasons (e.g. food allergy / medical reasons / digestive concerns)	5	
Helps me control my weight	6	
Contains natural ingredients	7	
Others in family / household want it / Influence from other/s	8	Skip to Q21
Is what I (or my family) usually eat(s)	9	
Just saw it and wanted it	10	
Is easily available in shops / supermarkets	11	

Is Australian-made	12	
Cheers me up / makes me feel good	13	
Other (Please Specify:)	14	

NOTE to Interviewer : Ask Q20b for those who answered '4', '5', '6' or '7' for Q20a

20.b. What specifically made you think the product was suitable for you / your family? **(FULLY PROBE; why do you say that? Can you explain that a bit more to me? Anything else?)**

_____

_____

_____

21. I noticed that before you selected your product, you didn't pick up the product. Did you notice any information on the front of the food product you selected?

(DO NOT READ) (SR)

Yes	1
No	2 → go to Q26

22. What information were you looking at on the front of the pack? **(ASK RESPONDENT TO INDICATE WHICH INFORMATION ON THE PRODUCT)**

(DO NOT READ - FULLY PROBE; Anything else? Ask details to code correctly)

	1st Mention (SR)	**Other Mentions (MR)**
The Brand / product / flavour name	1	1
A Nutrition content claim (e.g. Fat Free, low in sugar)	7	7
The country of origin	11	11
%Daily intake (%DI)I information (relevant for cereals)	14	14
Advisory /warning statement	15	15
Endorsement	16	16
Weight	18	18
Other (Please Specify) :	19	19

23. I'm interested to know if any of the information on the front of the pack that you read was used in your decision to buy the product. You said you looked at **[READ FIRST ITEM SELECTED AT Q22].**

a. Did you use this in your decision to buy the product a lot, a little or not at all?

[REPEAT FOR ALL OTHER ITEMS SELECTED AT Q22]

	RECORD Q22 RESPONSES (MR)	**A lot**	**A little**	**Not at all**
The Brand / product / flavour name	1	1	2	3
A Nutrition content claim (e.g. Fat Free, low in sugar)	7	1	2	3
The country of origin	11	1	2	3
%Daily intake (%DI)I information (relevant for cereals)	14	1	2	3
Advisory /warning statement	15	1	2	3
Endorsement	16	1	2	3
Weight	18	1	2	3
Other (Please Specify) :	19	1	2	3

NOTE to Interviewer : Ask Q24 for those who selected '7' – 'a lot' or 'a little' in Q23a

24.a. You said that you used a nutrition claim (e.g. fat free, low in sugar) in making your decision. Why did you use this piece of information ? **(FULLY PROBE; why do you say that? Can you explain that a bit more to me? Anything else?)**

b. Record the claim itself where possible E.g. "Low in fat"	

NOTE to Interviewer : Ask Q25 for all who selected '7' – 'a lot' or 'a little' in Q23a

25. Overall, how much do you **TRUST** the information presented in nutrition claims on packs (e.g. Fat Free, Low in sugar)

(READ) (SR)

Trust a lot	1
Trust a little	2
Neither trust nor distrust	3
Distrust a little	4
Distrust a lot	5

NOTE to Interviewer : All to Go to SECTION D except for those who did not select '7' in 23a, or selected '7' – 'not at all'

NOTE to Interviewer : Ask Q26 for those who did **not** select '7' in 23a, or selected '7' – 'not at all'

26. I know you didn't read a nutrition claim on the pack, but I'm interested in getting your opinion of these types of claims now.

USE PACK TO POINT OUT A NUTRITION CONTENT CLAIM.

Overall, how much do you TRUST the information presented in nutrition claims on packs (e.g. Fat Free, Low in sugar)

(READ) (SR)

Trust a lot	1
Trust a little	2
Neither trust nor distrust	3
Distrust a little	4
Distrust a lot	5

NOTE to Interviewer : All to Go to SECTION D

SECTION D:

NOTE to Interviewer

Use this section when interviewing ALL respondents

(READ) And finally, I just need to ask some questions about you, this is just to make sure we are speaking to a good cross section of people

27. RECORD GENDER

(DO NOT READ) (SR)

Male	1
Female	2

28. Can you please tell me which of the following age groups you fall into?

(READ) (SR)

Under 18 years (discontinue)	1
18 – 25 years	2
26-30 years	3
31-35 years	4
36-40 years	5
41-45 years	6
46-50 years	7
51-55 years	8
56-60 years	9
Over 60 years	10
Prefer not to answer	99

29. Please indicate if any of the following apply to you or any members of your household for whom you purchase food?

(READ) (MR)

Food allergy	1
Other health concerns such as asthma, diabetes, migraine	2
Digestive concerns such as coeliac disease, irritable bowel syndrome	3
Health concerns such as heart disease, high blood pressure or cholesterol	4
On a specific diet	5
Watching my weight /others' weight generally	6
Watching my health / others' health generally	7
Pregnancy or breast feeding	8
Religious / ethical beliefs that influence dietary choices / vegetarian / vegan	9
Other (specify)	10
No, none	11
Prefer not to answer	12

30. How much attention do you pay to keeping a healthy diet, would you say …….

READ (SR)

Very high amount of attention	1
High amount of attention	2
Medium amount of attention	3
Low amount of attention	4
Very low amount of attention	5
No attention	6

31. How many people live in your household of the following age groups (including yourself)?

(READ) (MR)

- ☐ Persons aged 18 years and over
- ☐ Persons aged 15-17 years
- ☐ Persons aged less than 15 years

[AUSTRALIA ONLY]

32. What is the level of education is the highest you have attained?

(READ) (SR)

Postgraduate Degree / Graduate Diploma / Graduate Certificate	1
Bachelor Degree	2
Advanced Diploma / Diploma / Certificate	3
Year 12	4
Year 11	5
Year 10 or below	6
Other (specify)	7
None of the above	8
Prefer not to answer	9

[NEW ZEALAND ONLY]

33. What is the level of education is the highest you have attained?

(READ) (SR)

No Qualification / Fourth Form or lower	1
Fifth Form Qualification / school certificate / NCEA Level 1	2
Sixth Form Qualification / university entrance / NCEA Level 2	3
Higher School Qualification / Bursary / NCEA Level 3	4
Vocational Qualification	5
Bachelor Degree	6
Higher Degree	7
Other (specify)	8
None of the above	9
Prefer not to answer	10

[AUSTRALIA ONLY]

34. What is your household's total annual income before tax?

(READ) (SR)

Negative / Nil income	1
$1 - $12,999 per year ($1 - $249 per week)	2
$13,000 - $31,199 per year ($250 - $599 per week)	3
$31,200 - $51,999 per year ($600 - $999 per week)	4
$52,000 - $67,599 per year ($1,000 - $1,299 per week)	5
$67,600 - $103,999 per year ($1,300 - $1,999 per week)	6
$104,000 or more per year ($2,000 or more per week)	7
Prefer not to answer	8

[NEW ZEALAND ONLY]

35. What is your household's total annual income before tax?

(READ) (SR)

Negative / Nil income	1
$1 - $10,000	2
$10,001 - $30,000	3
$30,001 - $50,000	4
$50,001 - $70,000	5
$70,001 - $100,000	6

$100,001 or more	7
Prefer not to answer	8

NOTE to Interviewer

Thanks and CLOSE

Pay incentive

10 APPENDIX F: OBSERVATION TRACKING SHEET

Tracker

Site 1 2 3 4 5 6

Date
Thursday 1
Saturday 2

Tracking Number

Notes

Section Time
IN : :
OUT : :
Time in section :-----mins/---- secs

Primary Shopper Sex Age
Alone 1

Group Sex Age
Member 1
Member 2
Member 3
Family 2
Couple 3
Friend 4

List
Yes 1
No 2

Trolley / Basket / Bag
Nothing 0 Trolley 1 Basket 2 Own bag 3

Demographic Codes
Gender
1 = Male
2 = Female

Age
1 = 0-11
2 = 12-17
3 = 18-29
4 = 30-39
5 = 40-49
6 = 50-59
7 = 60+

Kids Influence
Yes 1 No 2
Accept Yes 1 no 2

Other Influence
Yes 1 No 2
Accept Yes 1 No 2

Confused/Annoyed
Yes 1 (EX)
No 2
Notes

Can't Find
Yes 1 (EX)
No 2
Notes

Entrance **Exit**
Front 1 1
Back 2 2

Overall Style
Immediate - Selected a product without hesitation 1
Browsed Briefly - Hesitated and read 1 or 2 products quickly 2
Browsed Thoroughly - Stopped read and handled numerous products 3

	CODE (office Use)	Product Description	Lk	St	Tc	Pup	Rd $	Rd F	Rd B	Rd S	Compared With	Buy	Buy Number	Imm	BB	BT
1			Y 1 N 2	1 2	1 2	1 2	1 2	1 2	1 2	1 2		1 2		1	2	3
2			Y 1 N 2	1 2	1 2	1 2	1 2	1 2	1 2	1 2		1 2		1	2	3
3			Y 1 N 2	1 2	1 2	1 2	1 2	1 2	1 2	1 2		1 2		1	2	3
4			Y 1 N 2	1 2	1 2	1 2	1 2	1 2	1 2	1 2		1 2		1	2	3
5			Y 1 N 2	1 2	1 2	1 2	1 2	1 2	1 2	1 2		1 2		1	2	3

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