

ATTACHMENT 3

Formulated Beverages Survey

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- Prepared for -

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INTRODUCTION

Background

Food Standards Australia New Zealand (FSANZ) has recommended amending the Australia New Zealand Food Standards Code (the Code) to create a category of beverages, known as Formulated Beverages. Formulated Beverages are defined as non-carbonated, non-alcoholic, water-based flavored beverages that contain added vitamins and / or minerals. They are distinct from ‘sports drinks’ (usually with added amino acids) and ‘energy drinks’ (which are carbonated and caffeinated). Formulated Beverages are not permitted to be produced in Australia, however, under the Trans-Tasman Mutual Recognition Agreement (TTMRA) they can be produced in New Zealand and imported and sold in Australia. Under the TTRMA goods need only comply with the standards or regulations applying in the country in which they are produced before they can be sold in the other country. Under the proposed new category, Formulated Beverages would have a maximum compositional requirement of 24% fruit ingredients and 7.5g sugar per 100ml. Formulated Beverages are expected to fill a market niche with consumption trends away from high sugar beverages towards healthier alternatives.

Objectives

FSANZ has received a request from Ministers to respond to several issues before a final decision is made as to whether Formulated Beverages can be manufactured in Australia. In responding to the review request, FSANZ wanted to:

- Seek information regarding the likely responses of consumers to this group of beverages;
- Acquire data that can demonstrate likely patterns and levels of Formulated Beverage consumption;
- Understand the motivations behind decisions to consume or not consume;
- Determine the extent to which Formulated Beverages will potentially replace tap or bottled water thereby increasing sugar consumption and contributing to obesity;
- Find out how (potential) consumers view these products in terms of their ‘healthiness’ and levels of sugar / energy and if they are able to accurately assess products relative to other non-alcoholic beverages.

Methodology

Roy Morgan Research recommended an online survey methodology to achieve the objectives of the project and at the same time keep the project cost within FSANZ's budget. This methodology also has the benefit of allowing presentation of the visuals of the different formulated beverage brands to respondents in order to stimulate recognition and recall of consumption of Formulated Beverages.

Questionnaire Development and Testing

Prior to the conduct of the online survey, in-depth telephone interviews were conducted with Formulated Beverages drinkers from New Zealand and Australia. This qualitative research phase assisted in the formulation of the questionnaire for the online survey.

The questionnaire was then developed by Roy Morgan Research in close consultation with FSANZ. The questionnaire was programmed as a web-survey for completion on line, and took approximately 15 minutes for respondents to complete, on average. A copy of the final questionnaire in outline form is in the Appendix to this report.

Once programmed, a short pilot of the questionnaire was conducted before the main sample was released.

Sample

Sample for the online Formulated Beverages survey was obtained from the Roy Morgan Research Online Panel, which contains a subset of Roy Morgan Single Source participants. This subset currently contains thousands of email addresses of New Zealanders and Australians aged 14 years or older who recently participated in the Establishment Survey and mentioned that they are willing to participate in other surveys.

Respondents for the Formulated Beverages online survey were recruited by sending out email invitations to a sample drawn from the Online Panel. A total of 2,091 respondents participated in the survey with 1,281 respondents coming from Australia and 810 respondents coming from New Zealand.

Experience has taught us that there can be differences between the general population and the population of an online research panel. An online survey is limited to some extent in its ability to "represent" the total population.

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For instance, younger people who live in metropolitan areas and have a higher socio-economic status are more likely to have access to the internet. Potential internet biases were addressed in several ways:

- Quotas were set to ensure that key demographic segments were not under-represented in the online sample. Quotas for the different age groups were set to ensure that the sample was representative of each country's population. In order to obtain a representative geographical spread, the sample was stratified by region within each country.
- To help understand the extent to which the online sample differed from the overall population, we examined the income and education patterns of both the New Zealand respondents and the Australian respondents compared to the New Zealand and Australian population patterns of income and education division. While there were differences, they were minor. There was insufficient justification in using these differences to add a further level of weighting to attempt to correct for the differences between the online sample and the general population.
- Chi-square tests were conducted on the age and location groups for both the New Zealand respondents and the Australian respondents compared to the New Zealand and Australian population patterns (see Appendix One Technical Notes for additional information). The tests showed that within both countries, for both age and location, the differences between the sample distribution and the population distribution were not statistically significant.

Weighting

Australia and New Zealand have been sampled deliberately at very different rates for this study in order to ensure adequate representation of formulated beverage consumers. In this regard, weights were applied to the data in order to correct for these disproportions and combine the data from the two countries in a meaningful way.

As mentioned previously, the study produced a reasonably balanced sample by age and sex and area within each country but still with some slight discrepancies compared to the proportions of the actual population. Therefore the data were weighted by age, sex and area within each country in order to correct for the remaining discrepancies in sampling, removing any slight biases that might have arisen from over or under representing any age, sex or area groups. The weights applied were based on the 2006 Australian Bureau of Statistics (ABS) and Statistics New Zealand (SNZ) population estimates. The weights applied, thus, sufficiently enabled projection of survey figures to the population.

Statistical Significance Testing

Statistical significance testing of the survey results has been conducted for individual cells within each country and between the two countries. For significance testing within each country, individual cells were compared with corresponding row totals. For significance testing between the two countries, individual cells from Australia were compared with corresponding cells from New Zealand. Statistical significance is indicated in the following tables when appropriate (see Appendix One Technical Notes for additional information).

Outputs and Deliverables

This report comprises a set of summary tables and brief descriptive text. The other main deliverables were:

- An ASTEROID dataset
- An SPSS dataset

MAIN FINDINGS

Non-Alcoholic Beverage Consumption

Non-Alcoholic Beverages Consumed in a Typical Week

In a typical week, the most commonly consumed non-alcoholic beverages in both Australia and New Zealand are tea and coffee (86% Australia; 85% New Zealand) followed by tap water (68% Australia; 69% New Zealand) and fruit juice or fruit drinks (58% Australia; 54% New Zealand).

More than 9 out of 10 Australians and New Zealanders drink water with nothing added to it (92% Australia; 94% New Zealand) in a typical week. This includes tap water, filtered water and plain bottled water.

Just over a third of Australians and New Zealanders drink any kind of bottled water in a typical week (37% Australia; 36% New Zealand). This includes bottled water with and without additives.

As a proportion of each country's population, there were more drinkers of white milk, cordials, flavoured milk and bottled sparkling water in Australia than in New Zealand (white milk 35% cf. 29%; cordials 26% cf. 13%; flavoured milk 18% cf. 11%; bottled sparkling water 10% cf. 5%).

On the other hand, there were more drinkers of energy drinks and flavoured bottled still water or bottled still water with vitamins added in New Zealand compared to Australia (energy drinks 15% cf. 5%; bottled water or with vitamins or flavours added 11% cf. 4%).

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**Table 1: Non-Alcoholic Beverages Consumed in a Typical Week
By Country and By Drinker Type (Drank FB in the Last 12 Months)**

	Australia			New Zealand		
	Total	FB Drinker	Non-FB Drinker	Total	FB Drinker	Non-FB Drinker
<i>Base: Unweighted</i>	1,281	341	940	810	490	320
<i>Base: Weighted (in 000)</i>	16,828	4,722	12,106	3,265	1,977	1,288
	%	%	%	%	%	%
Tea / Coffee	86	82*	88*	85	80*	91*
White milk (except in tea / coffee)	35+	42*+	32*+	29+	32+	26+
Flavoured milk	18+	25*+	15*+	11+	13*+	8*+
Soy drinks	8	6*	9*	7	6	9
Tap water	68	67	68	69	68	71
Filtered water	37	38	37	41	45*	34*
Bottled still water (nothing added)	30	42*+	25*+	27	32*+	19*+
Bottled still water (flavours and/or vitamins added)	4	8*+	2*	11+	18*+	1*
Bottled sparkling water (with or without flavour)	10+	13*+	9*+	5+	5+	5+
Fruit juice / Fruit drinks	58	61	57+	54	56	50+
Cordials	26+	35*+	23*+	13+	15+	11+
Energy Drinks (e.g. Red Bull)	5+	12*+	3*	15+	22*+	5*
Sports Drinks (e.g. Powerade)	8	19*+	4*+	7	11*+	-*+
Zero sugar / diet soft drinks	23	30*	20*	24	27*	19*
Soft drinks (e.g. cola, lemonade)	37	47*+	33*+	34	40*+	25*+
Rain Water / Tank Water	2+	-	2+	-+	-	1+
Hot Chocolate / Cocoa (e.g. Milo)	1+	-+	1+	4+	4+	4+
Herbal Tea	1	-	1	1	1	1
Others	1	1	1	1	1	1
WATER SUMMARY:						
Total Water with Nothing Added	92	93	92	94	94	94
Total Bottled Water	37	49*	32*+	36	44*	23*+

Q1 : This question is about what you drink in a typical week. Which of the following types of non-alcoholic drinks would you normally drink?

Base : All Respondents

- Figure is less than 0.5%

+ Difference significant between the two countries

* Difference significant as compared to the total population for that country

Formulated Beverages Survey

**Table 2: Non-Alcoholic Beverages Consumed in a Typical Week
By Age Group**

	Australia						New Zealand					
	14 to 17	18 to 24	25 to 34	35 to 44	45 to 54	55+	14 to 17	18 to 24	25 to 34	35 to 44	45 to 54	55+
<i>Base: Unweighted</i>	74	127	203	249	268	360	60	101	132	162	151	204
<i>Base: Weighted (in 000)</i>	1128	2016	2836	3012	2832	5003	253	404	536	640	555	876
	%	%	%	%	%	%	%	%	%	%	%	%
Tea / Coffee	52*	74*	82	86	92*	98*	38*	71*	82	89	93*	98*
White milk (except in tea / coffee)	49*	49*	40	33	26*	30*	44	35	29	36	22*	22*
Flavoured milk	24	32*	21	21	12*	9*	28*	28*	12	9	5*	4*
Soy drinks	12	7	7	4*	11	9	0	8	9	6	9	7
Tap water	66	62	69	77*	64	66	65	75	73	74	59*	68
Filtered water	38	35	43	34	37	36	29*	47	42	43	43	37
Bottled still water (nothing added)	24	45*	40*	33	30	17*	25	46*	27	28	31	14*
Bottled still water (flavours and/or vitamins added)	7	10*	4	4	3	2*	10	17	17	14	7	6*
Bottled sparkling water (with or without flavour)	2*	10	9	10	14*	11	1	5	5	5	8	5
Fruit juice / Fruit drinks	68	67*	63	56	52*	54	70*	76*	50	52	47	46
Cordials	44*	28	33*	32*	20*	18*	24*	14	19	17	9*	7*
Energy Drinks (e.g. Red Bull)	14*	11*	11*	5	2*	0	28*	36*	15	21*	7*	2*
Sports Drinks (e.g. Powerade)	19*	13	11	11	6	2*	11	11	9	8	6	3*
Zero sugar / diet soft drinks	22	21	23	31*	29*	15*	21	36*	25	28	25	15*
Soft drinks (e.g. cola, lemonade)	60*	62*	38	38	29*	24*	65*	55*	41	31	24*	21*
Rain Water / Tank Water	1	0	3	1	3	2	0	0	0	-	0	-
Hot Chocolate / Cocoa (e.g. Milo)	1	1	-	1	1	1	5	4	8	3	2	4
Herbal Tea	2	-	-	1	1	-	0	0	2	1	0	1
Others	3	0	0	1	1	-	0	0	0	2*	0	1
WATER SUMMARY:												
Total Water with Nothing Added	94	95*	92	95*	91	91	89	97	96	95	93	94
Total Bottled Water	27*	50*	45*	39	39	26*	32	59*	38	37	40	21*

Q1 : This question is about what you drink in a typical week. Which of the following types of non-alcoholic drinks would you normally drink?

Base : All Respondents

- Figure is less than 0.5%

* Difference significant as compared to the total population for that country

Non-Alcoholic Beverages Consumed the Most

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Coffee or tea were also the most consumed non-alcoholic beverage in both Australia (37%) and New Zealand (44%) in a typical week (Table 3). Tap water is the non-alcoholic beverage next most consumed (26% in Australia; 22% in New Zealand). Filtered water ranks third (16% in Australia; 14% in New Zealand).

As a proportion of each country's population, more people in Australia mentioned water with nothing added as the most consumed non-alcoholic beverage than in New Zealand (45% cf. 40%).

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Table 3: Non-Alcoholic Beverages Consumed the Most, 2nd, 3rd

By Country

	Australia			New Zealand		
	Drank the Most	2 nd	3 rd	Drank the Most	2 nd	3 rd
<i>Base: Unweighted</i>	1,281	1,281	1,281	810	810	810
<i>Base: Weighted (in 000)</i>	16,828	16,828	16,828	3,265	3,265	3,265
	%	%	%	%	%	%
Tea / Coffee	37+	29+	11+	44+	25+	8+
White milk (except in tea / coffee)	1	5	10	1	4	9
Flavoured milk	-	2+	3+	-	1	2
Soy drinks	-	1	3	-	+	2+
Tap water	26	19+	11	22	24+	9
Filtered water	16	7+	5	14	11+	6
Bottled still water (nothing added)	3	4	6	3	4	6
Bottled still water (flavours and/or vitamins added)	-	+	+	-	2+	2+
Bottled sparkling water (with or without flavour)	1	2	1	-	1	1
Fruit juice / Fruit drinks	4	11	19	4	9	18
Cordials	2	4	6+	1	3	3+
Energy Drinks (e.g. Red Bull)	-	+	1+	1	2+	3+
Sports Drinks (e.g. Powerade)	-	1	1	-	1	1
Zero sugar / diet soft drinks	3	6	6	3	5	7
Soft drinks (e.g. cola, lemonade)	5+	6	7+	3+	6	9+
Rain Water / Tank Water	1	1	-	-	-	-
Hot Chocolate / Cocoa (e.g. Milo)	-	+	+	-	2+	2+
Others	-	-	-	-	-	1
Total Who Drink Only One Product Type	n/a	2	2	n/a	2	2
Total Who Drink Only Two Product Types	n/a	n/a	8	n/a	n/a	10
WATER SUMMARY:						
Total Water with Nothing Added	45+	30+	21	40+	38+	21
Total Bottled Water	4	6	7	4	7	9

Q2 : In a typical week, which of the following would you drink the most of?

Q3 : After [Answer in Q2], which of the following would you drink the second most of?

Q4 : After [Answer in Q2 and Q3], which of the following would you drink the third most of?

Base : All Respondents

- Figure is less than 0.5%

+ Difference significant between the two countries

Amongst Formulated Beverages (FB) drinkers, coffee or tea are the most consumed non-alcoholic beverage in both Australia (29%) and New Zealand (39%) in a typical week (Table 4).

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As a proportion of FB drinkers in each country, a significantly greater proportion of FB-drinking New Zealanders mentioned coffee or tea as the most consumed beverage compared to Australia. Tap water closely follows coffee/tea when it comes to the most consumed non-alcoholic beverage (27% of FB drinkers in Australia; 21% in FB drinkers in New Zealand). Filtered water ranks third (17% in Australia; 16% in New Zealand).

Proportionally more FB drinkers in Australia mentioned water with nothing added as the most consumed non-alcoholic beverage than in New Zealand (49% cf. 42%).

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Table 4: Non-Alcoholic Beverages Consumed the Most, 2nd, 3rd
Among those who drank Formulated Beverages in the last 12 Months

	Australia			New Zealand		
	Drank the Most	2 nd	3 rd	Drank the Most	2 nd	3 rd
<i>Base: Unweighted</i>	341	341	341	490	490	490
<i>Base: Weighted (in 000)</i>	4,722	4,722	4,722	1,977	1,977	1,977
	%	%	%	%	%	%
Tea / Coffee	29+	27	12	39+	23	8
White milk (except in tea / coffee)	1	4	9	2	5	8
Flavoured milk	-	3+	4+	1	1+	1+
Soy drinks	-	1	1	0	-	1
Tap water	27	15+	10	21	21+	10
Filtered water	17	6+	5	16	10+	6
Bottled still water (nothing added)	5	5	8	4	4	6
Bottled still water (flavours and/or vitamins added)	-	1+	1+	-	3+	4+
Bottled sparkling water (with or without flavour)	1	1	1	-	1	1
Fruit juice / Fruit drinks	5	12	16	5	10	17
Cordials	4	5	6+	2	2	3+
Energy Drinks (e.g. Red Bull)	-	1+	2+	1	3+	4+
Sports Drinks (e.g. Powerade)	-	2	2	-	1	2
Zero sugar / diet soft drinks	3	9	8	4	5	8
Soft drinks (e.g. cola, lemonade)	6	7	7	3	6	11
Rain Water / Tank Water	-	-	-	-	-	-
Hot Chocolate / Cocoa (e.g. Milo)	-	-	-	-	2	2
Others	-	-	1	-	-	1
Total Who Drink Only One Product Type	n/a	-	1+	n/a	2	2+
Total Who Drink Only Two Product Types	n/a	n/a	6	n/a	n/a	7
WATER SUMMARY:						
Total Water with Nothing Added	49	26+	23	42	35+	22
Total Bottled Water	6	7	10	5	8	10

Q2 : In a typical week, which of the following would you drink the most of?

Q3 : After [Answer in Q2], which of the following would you drink the second most of?

Q4 : After [Answer in Q2 and Q3], which of the following would you drink the third most of?

Base : Those who have tried any Formulated Beverage brand in the last 12 months

- Figure is less than 0.5%

+ Difference significant between the two countries

Formulated Beverages Survey

**Table 5: Non-Alcoholic Beverages Consumed the Most
By Age Group**

	Australia						New Zealand					
	14 to 17	18 to 24	25 to 34	35 to 44	45 to 54	55+	14 to 17	18 to 24	25 to 34	35 to 44	45 to 54	55+
<i>Base: Unweighted</i>	74	127	203	249	268	360	60	101	132	162	151	204
<i>Base: Weighted (in 000)</i>	1128	2016	2836	3012	2832	5003	253	404	536	640	555	876
	%	%	%	%	%	%	%	%	%	%	%	%
Tea / Coffee	10*	14*	22*	37	48*	57*	7*	16*	29*	46	55*	68*
White milk (except in tea / coffee)	6	-	1	1	1	1	6	1	-	2	1	-
Flavoured milk	-	-	1	1	1	-	1	1	1	1	-	-
Soy drinks	-	-	-	-	1	1	-	-	1	-	-	-
Tap water	31	38*	28	28	23	20*	46*	26	30*	20	17	14*
Filtered water	17	19	23*	14	12	14	12	20	21*	13	15	8*
Bottled still water (nothing added)	3	5	4	4	3	2	1	6	1	5	4	3
Bottled still water (flavours and/or vitamins added)	-	-	-	-	1	-	2	1	1	-	-	-
Bottled sparkling water (with or without flavour)	-	-	1	1	1	1	-	-	-	1	1	-
Fruit juice / Fruit drinks	14*	7	4	2*	3	1*	8	16*	2*	3	3	2*
Cordials	8	3	3	2	-*	1*	6	1	3	1	-	-
Energy Drinks (e.g. Red Bull)	-	-	-	-	-	-	2	1	2	1	-	-
Sports Drinks (e.g. Powerade)	-	-	-	-	-	-	-	1	-	1	-	-
Zero sugar / diet soft drinks	1*	4	3	5	3	1*	1	7	5	3	2	2
Soft drinks (e.g. cola, lemonade)	7	10*	7	5	3	1*	8	4	6	2	2	-
Rain Water / Tank Water	1	-	2	-	2	1	-	-	-	1	-	-
Hot Chocolate / Cocoa (e.g. Milo)	1	-	-	1	-	-	-	-	1	1	-	-
Herbal Tea	1	-	-	-	-	-	-	-	-	1	-	1
Others	2	-	-	-	1	-	-	-	-	-	-	1
WATER SUMMARY:												
Total Water with Nothing Added	51	62*	56*	45	39*	36*	59*	52*	52*	38	37	25*
Total Bottled Water	3	5	5	4	5	3	3	7	2	6	5	3

Q2 : In a typical week, which of the following would you drink the most of?

Q3 : After [Answer in Q2], which of the following would you drink the second most of?

Q4 : After [Answer in Q2 and Q3], which of the following would you drink the third most of?

Base : All Respondents

- Figure is less than 0.5%

* Difference significant as compared to the total population for that country

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Formulated Beverage Consumption

Formulated Beverages Tried in the Last 12 Months

Both in Australia and New Zealand, Mizone is the Formulated Beverage tried by the greatest proportion of people in the last 12 months (21% in Australia: 44% in New Zealand). In Australia, Waterplus ranks second as the most tried FB in the last 12 months (10%), while G-Force ranks second in New Zealand (25%).

As a proportion of each country's population, significantly fewer people have tried FBs in the last 12 months in Australia than in New Zealand (28% cf. 61%).

**Table 6: Formulated Beverages Tried in the Last 12 Months
By Country and By Drinker Type (Drank FB in the Last 12 Months)**

	Australia		New Zealand	
	Total	FB Drinkers	Total	FB Drinkers
<i>Base: Unweighted</i>	1,281	341	810	490
<i>Base: Weighted (in 000)</i>	16,828	4,722	3,265	1,977
	%	%	%	%
Mizone	21+	76	44+	73
G Force	5+	19 +	25+	42+
Thorpedo	4	13	n/a	n/a
Play	2	7	n/a	n/a
Temple Hydrotherapy	1	2	n/a	n/a
Waterplus	10	37	n/a	n/a
Aquashot	n/a	n/a	34	56
E2	n/a	n/a	32	54
Charlies Sportswater	n/a	n/a	5	8
SUMMARY:				
Tried 1 Brand only	16	58+	18	29+
Tried Multiple Brands	12+	42+	43+	71+
Total Who Tried at least 1 Formulated Beverage Brand	28+	100	61+	100
Total Who Did NOT Try Any Formulated Beverage Brand	72+	0	39+	0

Q5 : New types of non-alcoholic water based beverages are now becoming more common. From the following please select all the drinks you have tried in the last 12 months.

Base : All Respondents

- Figure is less than 0.5%

+ Difference significant between the two countries

As a proportion of FB drinkers, significantly more New Zealander drinkers than Australian drinkers have tried multiple FB brands in the last 12 months (71% cf. 42%).

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Table 7: Formulated Beverages Tried in the Last 12 Months
By Age Group

	Australia						New Zealand					
	14 to 17	18 to 24	25 to 34	35 to 44	45 to 54	55+	14 to 17	18 to 24	25 to 34	35 to 44	45 to 54	55+
<i>Base: Unweighted</i>	74	127	203	249	268	360	60	101	132	162	151	204
<i>Base: Weighted (in 000)</i>	1128	2016	2836	3012	2832	5003	253	404	536	640	555	876
	%	%	%	%	%	%	%	%	%	%	%	%
Mizone	52*	41*	32*	23	14*	4*	64*	65*	59*	54*	36*	19*
G Force	10	10	9	3	6	2*	61*	39*	30	32	18*	6*
Thorpedo	9	6	4	6	2	1*	n/a	n/a.	n/a	n/a	n/a	n/a
Play	11*	1	1	3	2	-	n/a	n/a.	n/a	n/a	n/a	n/a
Temple Hydrotherapy	1	2	1	-	1	-	n/a	n/a.	n/a	n/a	n/a	n/a
Waterplus	20*	22*	14	14	6*	2*	n/a	n/a.	n/a	n/a	n/a	n/a
Aquashot	n/a	n/a.	n/a	n/a	n/a	n/a	57*	53*	47*	34	29	14*
E2	n/a	n/a.	n/a	n/a	n/a	n/a	55*	49*	45*	40*	24*	11*
Charlies Sportswater	n/a	n/a.	n/a	n/a	n/a	n/a	7	7	6	6	5	2*
SUMMARY:												
Tried 1 Brand only	28*	19	24*	21	16	6*	14	14	19	22	22	13*
Tried Multiple Brands	34*	26*	16	12	6*	1*	73*	64*	61*	50*	33*	15*
Total Who Tried at least 1 Formulated Beverage Brand	62*	45*	40*	33	22*	7*	87*	78*	80*	72*	55	28*
Total Who Did NOT Try Any Formulated Beverage Brand	38*	55*	60*	67	78*	93*	13*	22*	20*	28*	45	72*

Q5 : New types of non-alcoholic water based beverages are now becoming more common. From the following please select all the drinks you have tried in the last 12 months.

Base : All Respondents

- Figure is less than 0.5%

* Difference significant as compared to the total population for that country

Frequency of Drinking Formulated Beverages

In Australia, the majority of those who have tried Formulated Beverages in the last 12 months are not regular users and have only tried them once (69%), while 46% of New Zealand FB drinkers have only tried them once.

As a proportion of each country's population, significantly more people have not tried FBs in the last 12 months in Australia than in New Zealand (72% cf. 39%).

Formulated Beverages Survey

**Table 8: Frequency of Drinking Formulated Beverages
By Country and By Drinker Type**

	Australia		New Zealand	
	Total	FB Drinkers	Total	FB Drinkers
<i>Base: Unweighted</i>	1,281	341	810	490
<i>Base: Weighted (in 000)</i>	16,828	4,722	3,265	1,977
	%	%	%	%
Not tried any in the last 12 months	72+	n/a	39+	n/a
Not a regular drinker, only tried them once	19+	69+	28+	46+
Once every few months	5+	17	13+	22
Once a month	2+	6+	7+	12+
Once a fortnight	1+	2+	6+	9+
Once a week	1+	3	3+	4
Once every three or four days	-+	2+	3+	4+
Every second day	-	-	1	1
Once a day	-	-	-	1
Several times a day	-	-	-	-

Q6 : You have tried [Answer in Q5], how often do you drink these drinks in total / this drink?

Base : All respondents

- Figure is less than 0.5%
- + Difference significant between the two countries

Formulated Beverages Survey

Table 9: Frequency of Drinking Formulated Beverages

By Age Group

	Australia						New Zealand					
	14 to 17	18 to 24	25 to 34	35 to 44	45 to 54	55+	14 to 17	18 to 24	25 to 34	35 to 44	45 to 54	55+
<i>Base: Unweighted</i>	74	127	203	249	268	360	60	101	132	162	151	204
<i>Base: Weighted (in 000)</i>	1128	2016	2836	3012	2832	5003	253	404	536	640	555	876
	%	%	%	%	%	%	%	%	%	%	%	%
Not tried any in the last 12 months	38*	55*	60*	67*	78*	93*	13*	22*	20*	28*	45	72*
Not a regular drinker, only tried them once	50*	30*	26*	23	17	4*	38	22	34	37*	32	15*
Once every few months	9	7	9*	5	3	1*	22	25*	20*	13	10	3*
Once a month	1	4	4*	1	1	-	11	9	11	8	6	4*
Once a fortnight	1	3	-	1	-	-	9	14*	5	6	2*	2*
Once a week	-	1	1	3*	1	-	4	1*	3	5	3	1*
Once every three or four days	1	-	-	-	-	1	2	6	5	2	1	1
Every second day	-	-	-	-	-	-	-	-	1	1	1	1
Once a day	-	-	-	-	-	-	2	-	1	-	1	-
Several times a day	-	-	-	-	-	-	-	-	1	-	-	-

Q6 : You have tried [Answer in *Q5*], how often do you drink these drinks in total / this drink?

Base : All respondents

- Figure is less than 0.5%

* Difference significant as compared to the total population for that country

Formulated Beverage Brand Consumed the Most

Amongst those who have tried any brand of Formulated Beverage in the 12 months, 62% in Australia mentioned that they drink Mizone the most, while 43% in New Zealand mentioned that they drink Mizone the most. In Australia, Waterplus ranks second (17%) while in New Zealand, Aquashot ranks second (23%).

As a proportion of each country's population, significantly more people have tried multiple FB brands in the last 12 months in New Zealand than in Australia (71% cf. 42%).

Formulated Beverages Survey

Table 10: Formulated Beverage Brand Consumed the Most

By Country

	Australia	New Zealand
<i>Base: Unweighted</i>	341	490
<i>Base: Weighted (in 000)</i>	4,722	1,977
	%	%
Mizone	62+	43+
G Force	11	13
Thorpedo	4	n/a
Play	4	n/a
Temple Hydrotherapy	1	n/a
Waterplus	17	n/a
Aquashot	n/a	23
E2	n/a	20
Charlies Sportswater	n/a	1

Q7 : Which of these do you drink the most?

Base : Those who have tried any Formulated Beverage brand in the last 12 months

- Figure is less than 0.5%

+ Difference significant between the two countries

Table 11: Formulated Beverage Brand Consumed the Most

By Age Group

	Australia						New Zealand					
	14 to 17	18 to 24	25 to 34	35 to 44	45 to 54	55+	14 to 17	18 to 24	25 to 34	35 to 44	45 to 54	55+
<i>Base: Unweighted</i>	45	57	78	78	58	25	50	78	104	117	84	57
<i>Base: Weighted (in 000)</i>	699	912	1141	996	636	337	219	314	428	463	308	244
	%	%	%	%	%	%	%	%	%	%	%	%
Mizone	71	66	68	57	52	52	42	47	41	45	37	48
G Force	7	7	13	6	21*	25	23	9	11	13	18	7
Thorpedo	2	2	2	9	2	7	n/a	n/a.	n/a	n/a	n/a	n/a
Play	12	2	1	4	5	-	n/a	n/a.	n/a	n/a	n/a	n/a
Temple Hydrotherapy	1	3	-	-	2	-	n/a	n/a.	n/a	n/a	n/a	n/a
Waterplus	7*	21	15	23	17	17	n/a	n/a.	n/a	n/a	n/a	n/a
Aquashot	n/a	n/a.	n/a	n/a	n/a	n/a	11*	27	23	20	31	30
E2	n/a	n/a.	n/a	n/a	n/a	n/a	24	17	24	23	13	15
Charlies Sportswater	n/a	n/a.	n/a	n/a	n/a	n/a	-	1	1	-	1	-

Q7 : Which of these do you drink the most?

Base : Those who have tried any Formulated Beverage brand in the last 12 months

- Figure is less than 0.5%

* Difference significant as compared to the total population for that country

Formulated Beverages Survey

Amongst those who drink Formulated Beverages at least once a fortnight, a clear majority consume one bottle of FB on a typical day when they drink FB (78% in Australia; 79% in New Zealand).

Amongst this same group (those who drink FBs at least once a fortnight), drinking less than one bottle on a day they drink is uncommon in New Zealand (10%) and exceedingly uncommon in Australia (less than 0.5%). However care should be taken with interpretation of the data for Australian drinkers at this level due to small sample size.

Table 12: Quantity of Formulated Beverages Consumed on a Typical Day
Among those who drink FB at least once a fortnight

By Country		
	Australia	New Zealand
<i>Base: Unweighted</i>	27	98
<i>Base: Weighted (in 000)</i>	361	394
Standard Bottle = 600 ml.	%	%
Less than 1 bottle	-	10
1 bottle	79	79
2 bottles	21	11
3 bottles	-	-
More than 3 bottles	-	-
MEAN	1.21	1.06

Q8 : On a typical day when you drink [Answer in Q3], how much would you drink of these drinks in total / this drink?

Base : Those who drink Formulated Beverages at least once a fortnight

- Figure is less than 0.5%

+ Difference significant between the two countries

Note: The figures in the column(s) with a sample (unweighted) base less than 30 should be treated with caution

Formulated Beverages Survey

**Table 13: Quantity of Formulated Beverages Consumed on a Typical Day
Among those who drink FB at least once a fortnight**

By Age Group

	Australia						New Zealand					
	14 to 17	18 to 24	25 to 34	35 to 44	45 to 54	55+	14 to 17	18 to 24	25 to 34	35 to 44	45 to 54	55+
<i>Base: Unweighted</i>	2	5	3	7	4	6	10	20	20	24	13	11
<i>Base: Weighted (in 000)</i>	23	84	36	107	37	73	40	87	81	96	43	46
Standard Bottle = 600 ml.	%	%	%	%	%	%	%	%	%	%	%	%
Less than 1 bottle	-	-	-	-	-	-	8	-	10	21	12	9
1 bottle	100	88	69	84	100	47	83	92	74	76	78	64
2 bottles	-	12	31	16	-	53*	10	8	16	3	10	27
3 bottles or more	-	-	-	-	-	-	-	-	-	-	-	-
MEAN	1.00	1.12	1.31	1.16	1.00	1.53	1.06	1.08	1.11	0.93	1.04	1.23

Q8 : On a typical day when you drink [Answer in Q3], how much would you drink of these drinks in total / this drink?

Base : Those who drink Formulated Beverages at least once a fortnight

- Figure is less than 0.5%

* Difference significant as compared to the total population for that country

Other Non-Alcoholic Beverages Consumed on Days that Formulated Beverages are Consumed

Amongst those that have tried Formulated Beverages in the last 12 months, 72% in both Australia and New Zealand consumed tea or coffee on days that FB are consumed (tap water ranked second in both countries with 53%).

Table 14: Other Non-Alcoholic Beverages Consumed on Days that Formulated Beverages are Consumed

By Country

	Australia	New Zealand
<i>Base: Unweighted</i>	341	490
<i>Base: Weighted (in 000)</i>	4,722	1,977
	%	%
Tea / Coffee	72	72
White milk (except in tea / coffee)	16	14
Flavoured milk	10+	3+
Soy drinks	2	3
Tap water	53	53
Filtered water	30	34

Formulated Beverages Survey

	Australia	New Zealand
<i>Base: Unweighted</i>	341	490
<i>Base: Weighted (in 000)</i>	4,722	1,977
Bottled still water (nothing added)	18+	12+
Bottled still water (flavours and/or vitamins added)	1	1
Bottled sparkling water (with or without flavour)	6+	2+
Fruit juice / Fruit drinks	33+	24+
Cordials	15+	7+
Energy Drinks (e.g. Red Bull)	6	5
Sports Drinks (e.g. Powerade)	5+	2+
Zero sugar / diet soft drinks	18	14
Soft drinks (e.g. cola, lemonade)	21+	14+
Hot Chocolate / Cocoa (e.g. Milo)	-+	3+
Others	-	-
WATER SUMMARY:		
Total Water with Nothing Added	81	80
Total Bottled Water	22+	14+

Q9 : On a typical day when you drink [Answer in Q3], what other non-alcoholic drinks would you also drink? Select all that apply.

Base : Those who have tried any Formulated Beverage brand in the last 12 months

- Figure is less than 0.5%

+ Difference significant between the two countries

Formulated Beverages Survey

Table 15: Other Non-Alcoholic Beverages Consumed on Days that Formulated Beverages are Consumed

By Age Group

	Australia						New Zealand					
	14 to 17	18 to 24	25 to 34	35 to 44	45 to 54	55+	14 to 17	18 to 24	25 to 34	35 to 44	45 to 54	55+
<i>Base: Unweighted</i>	45	57	78	78	58	25	50	78	104	117	84	57
<i>Base: Weighted (in 000)</i>	699	912	1141	996	636	337	219	314	428	463	308	244
	%	%	%	%	%	%	%	%	%	%	%	%
Tea / Coffee	47*	61	72	87*	80	100	28*	49*	71	85*	90*	93*
White milk (except in tea / coffee)	22	11	17	19	16	13	32*	12	12	16	6*	7*
Flavoured milk	15	13	11	8	6	-	11*	5	3	1	-	-
Soy drinks	-	2	-	3	9	-	-	4	2	2	6	2
Tap water	57	51	56	62	38*	42	63	53	58	53	44	46
Filtered water	34	25	37	28	19*	37	21*	37	33	34	32	49*
Bottled still water (nothing added)	10	15	22	12	29	22	10	13	10	10	13	18
Bottled still water (flavours and/or vitamins added)	-	-	1	-	4	6	-	-	4	-	2	3
Bottled sparkling water (with or without flavour)	1*	5	9	4	14	6	-	2	2	2	2	2
Fruit juice / Fruit drinks	63*	28	35	18*	29	37	43*	29	19	22	24	15*
Cordials	24	13	18	11	14	10	17	7	14*	5	1*	-
Energy Drinks (e.g. Red Bull)	3	8	9	2*	4	6	8	10*	6	3	2*	-
Sports Drinks (e.g. Powerade)	14	5	-	4	3	4	1	3	-	3	2	0
Zero sugar / diet soft drinks	11	11	17	27*	19	21	14	16	17	7*	14	15
Soft drinks (e.g. cola, lemonade)	27	27	19	19	12*	22	27*	25*	16	11	6*	3*
Rain Water / Tank Water	-	-	1	-	1	-						
Hot Chocolate / Cocoa (e.g. Milo)	-	-	-	1	-	-	3	2	3	2	2	4
Herbal Tea	-	-	-	1	-	-	-	-	1	-	-	1
Others	2	-	1	-	-	-	-	-	-	-	-	2
WATER SUMMARY:												
Total Water with Nothing Added	85	76	82	85	75	78	82	79	82	78	76	82
Total Bottled Water	11*	19	28	16	34*	28	10	15	12	11	15	21

Q9 : On a typical day when you drink [Answer in Q3], what other non-alcoholic drinks would you also drink? Select all that apply.

Base : Those who have tried any Formulated Beverage brand in the last 12 months

- Figure is less than 0.5%

* Difference significant as compared to the total population for that country

Formulated Beverages Survey

Total Daily Non-Alcoholic Fluid Consumption when Formulated Beverages are Consumed

Total non-alcoholic fluid consumption amongst FB drinkers showed few differences between the two countries, with a mean of approximately one and three quarter litres in both countries.

**Table 16: Total Daily Non-Alcoholic Fluid Consumption when Formulated Beverages are Consumed
By Country**

	Australia	New Zealand
<i>Base: Unweighted</i>	341	490
<i>Base: Weighted (in 000)</i>	4,722	1,977
	%	%
Less than 1 litre	10+	6+
About 1 litre	14	14
More than 1 litre but less than 2 litres	28	32
About 2 litres	28	27
More than 2 litres but less than 3 litres	11	13
About 3 litres	6	7
More than 3 litres	4+	1+
MEAN	1.76	1.75

Q10 : Thinking of your total non-alcoholic fluid consumption. On a typical day when you have drinks like [Answer in Q3], what would be your total consumption of fluids?

Base : Those who have tried any Formulated Beverage brand in the last 12 months

- Figure is less than 0.5%

+ Difference significant between the two countries

Formulated Beverages Survey

Table 17: Total Daily Non-Alcoholic Fluid Consumption when Formulated Beverages are Consumed

By Age Group

	Australia						New Zealand					
	14 to 17	18 to 24	25 to 34	35 to 44	45 to 54	55+	14 to 17	18 to 24	25 to 34	35 to 44	45 to 54	55+
<i>Base: Unweighted</i>	45	57	78	78	58	25	50	78	104	117	84	57
<i>Base: Weighted (in 000)</i>	699	912	1141	996	636	337	219	314	428	463	308	244
	%	%	%	%	%	%	%	%	%	%	%	%
Less than 1 litre	15	15	9	6	9	7	8	5	2*	9	5	8
About 1 litre	18	11	18	12	6*	21	18	20	13	9*	15	15
More than 1 litre but less than 2 litres	38	20	26	27	31	31	29	35	35	36	30	25
About 2 litres	18	27	28	26	41*	32	32	34	26	22	26	27
More than 2 litres but less than 3 litres	4*	17	8	20*	3*	-	2*	4*	18	16	13	19
About 3 litres	1*	4	6	7	9	7	11	2*	7	6	10	7
More than 3 litres	5	6	5	2	-	2	-	-	-	2	1	-
MEAN	1.56	1.83	1.77	1.88	1.75	1.66	1.67	1.59	1.83	1.78	1.81	1.78

Q10 : Thinking of your total non-alcoholic fluid consumption. On a typical day when you have drinks like [Answer in Q3], what would be your total consumption of fluids?

Base : Those who have tried any Formulated Beverage brand in the last 12 months

- Figure is less than 0.5%

* Difference significant as compared to the total population for that country

Formulated Beverage as a Substitute or Supplement for other Non-Alcoholic Beverages

In Australia, a slight majority of people that have tried Formulated Beverages in the last 12 months replace some other drink but do not increase total fluid consumption (53%) on typical days that they drink Formulated Beverages, while 44% of New Zealand FB drinkers mention that FB consumption replaces some other drink but does not increase fluid consumption.

Formulated Beverages Survey

Table 18: Formulated Beverage as a Substitute or Supplement for other Non-Alcoholic Beverages

By Country and By Drinker Type (Drank FB in the Last 12 Months)

	Australia		New Zealand	
	Total	FB Drinkers	Total	FB Drinkers
<i>Base: Unweighted</i>	1,281	341	810	490
<i>Base: Weighted (in 000)</i>	16,828	4,722	3,265	1,977
	%	%	%	%
Increase total fluid consumption for the day but not replace some other drink	7+	26	18+	30
Replace some other drink on the day, but not increase total fluid consumption	15+	53+	26+	44+
Both increase total fluid consumption as well as replace some other drink	6+	21	16+	26
Not tried any Formulated Beverage in the last 12 months	72+	n/a	39+	n/a

Q11 : When you drink [Answer in Q3], does it ...

Increase your total fluid consumption for the day, (but not replace some other drink)?

Replace some other drink on the day (but not increase your total fluid consumption)?

Both increase your total fluid consumption as well as replace some other drink?

Base : All respondents

- Figure is less than 0.5%

+ Difference significant between the two countries

Formulated Beverages Survey

Table 19: Formulated Beverage as a Substitute or Supplement for other Non-Alcoholic Beverages

By Age Group

	Australia						New Zealand					
	14 to 17	18 to 24	25 to 34	35 to 44	45 to 54	55+	14 to 17	18 to 24	25 to 34	35 to 44	45 to 54	55+
<i>Base: Unweighted</i>	74	127	203	249	268	360	60	101	132	162	151	204
<i>Base: Weighted (in 000)</i>	1128	2016	2836	3012	2832	5003	253	404	536	640	555	876
	%	%	%	%	%	%	%	%	%	%	%	%
Increase total fluid consumption for the day but not replace some other drink	19*	16*	7	7	6	2*	26	23	21	18	21	10*
Replace some other drink on the day, but not increase total fluid consumption	34*	20	22*	22*	10*	4*	30	31	35*	35*	23	14*
Both increase total fluid consumption as well as replace some other drink	9	9	11*	5	6	1*	31*	24	23*	19	11	4*
Not tried any Formulated Beverage in the last 12 months	38*	55*	60*	67	78*	93*	13*	22*	20*	28*	45	72*

Q11 : When you drink [Answer in Q3], does it ...

Increase your total fluid consumption for the day, (but not replace some other drink)

Replace some other drink on the day (but not increase your total fluid consumption)

Both increase your total fluid consumption as well as replace some other drink

Base : All respondents

- Figure is less than 0.5%

* Difference significant as compared to the total population for that country

Non-Alcoholic Drinks Typically Replaced by Formulated Beverages

Amongst FB drinkers who say that FBs fully or partly replace other drinks on days they drink them, tap water is the drink most often replaced by Formulated Beverages, both in Australia and New Zealand (37% cf. 37%). In Australia, amongst the same group, bottled water is the drink second most often replaced by Formulated Beverages (24%), while in New Zealand tea and coffee rank second (23%). Filtered water ranks third in both Australia and New Zealand (20% cf. 22%), while soft drinks rank fourth in both Australia and New Zealand (19% cf 20%).

Formulated Beverages Survey

**Table 20: Non-Alcoholic Drinks Typically Replaced by Formulated Beverages
By Country (Amongst Those For Whom Formulated Beverages Replace Other Drinks)**

	Australia	New Zealand
<i>Base: Unweighted</i>	254	344
<i>Base: Weighted (in 000)</i>	3,501	1,382
	%	%
Tea / Coffee	15+	23+
White milk (except in tea / coffee)	1	2
Flavoured milk	3	3
Soy drinks	-	1
Tap water	37	37
Filtered water	20	22
Bottled still water (nothing added)	24	17
Bottled still water (flavours and/or vitamins added)	3	2
Bottled sparkling water (with or without flavour)	3	1
Fruit juice / Fruit drinks	9+	16+
Cordials	10	6
Energy Drinks (e.g. Red Bull)	2+	6+
Sports Drinks (e.g. Powerade)	9+	3+
Zero sugar / diet soft drinks	7	9
Soft drinks (e.g. cola, lemonade)	19	20
WATER SUMMARY		
Total Water with Nothing Added	67	63
Total Bottled Water	27+	18+

Q12 : When you drink [Answer in Q3], what other drink or drinks is it typically instead of?

Base : Those who have tried any Formulated Beverage brand in the last 12 months and claim that these drinks replace some other drink on the day (including those where Formulated Beverages both increase fluid consumption as well as replace some other drink)

+ Difference significant between the two countries

Formulated Beverages Survey

**Table 21: Non-Alcoholic Drinks Typically Replaced by Formulated Beverages
By Age Group (Amongst Those For Whom Formulated Beverages Replace Other Drinks)**

	Australia						New Zealand					
	14 to 17	18 to 24	25 to 34	35 to 44	45 to 54	55+	14 to 17	18 to 24	25 to 34	35 to 44	45 to 54	55+
<i>Base: Unweighted</i>	31	36	64	62	43	18	36	56	76	88	52	36
<i>Base: Weighted (in 000)</i>	488	583	931	791	468	241	155	223	313	345	192	154
	%	%	%	%	%	%	%	%	%	%	%	%
Tea / Coffee	12	13	10	18	21	20	6*	15	17	26	30	42*
White milk (except in tea / coffee)	2	3	-	-	-	4	-	6	-	2	1	-
Flavoured milk	10	3	1	-	5	-	6	8	3	-	1	-
Soy drinks	-	-	-	-	-	-	-	-	2	-	-	-
Tap water	20*	42	39	45	36	30	37	46	43	30	37	29
Filtered water	26	11	18	21	24	28	16	18	24	19	18	41*
Bottled still water (nothing added)	4*	20	32	22	27	38	16	22	20	13	12	22
Bottled still water (flavours and/or vitamins added)	2	5	5	4	2	-	6	3	4	-	-	2
Bottled sparkling water (with or without flavour)	5	3	2	5	-	6	-	2	2	-	-	2
Fruit juice / Fruit drinks	17	13	10	5	2*	-	34*	18	8*	17	11	9
Cordials	18	9	10	9	7	-	13	5	8	6	-	-
Energy Drinks (e.g. Red Bull)	2	-	3	3	-	-	7	8	4	11*	-	-
Sports Drinks (e.g. Powerade)	8	7	10	11	10	-	4	5	4	3	-	-
Zero sugar / diet soft drinks	2	1*	6	12	12	11	6	17	4*	12	10	6
Soft drinks (e.g. cola, lemonade)	18	30	19	19	11	17	25	34*	27	15	8*	5*
WATER SUMMARY												
Total Water with Nothing Added	43*	70	74	70	70	66	60	69	73*	51*	64	64
Total Bottled Water	7*	25	34	29	27	44	16	26	20	13	12	22

Q12 : When you drink [Answer in Q3], what other drink or drinks is it typically instead of?

Base : Those who have tried any Formulated Beverage brand in the last 12 months and claim that these drinks replace some other drink on the day (including those where Formulated Beverages both increase fluid consumption as well as replace some other drink)

- Figure is less than 0.5%

* Difference significant as compared to the total population for that country

Formulated Beverages Survey

Non-Alcoholic Drinks that Typically Substitute Formulated Beverages

Amongst FB drinkers, bottled still water without additives ranks first in both countries as the drink type to replace Formulated Beverages if they were not available (Australia: 37% cf. New Zealand: 30%). Tap water ranked second in both countries as a replacement for FB (25% cf. 27%).

Table 22: Non-Alcoholic Drinks that Typically Substitute Formulated Beverages when FB brands are not available

By Country		
	Australia	New Zealand
<i>Base: Unweighted</i>	341	490
<i>Base: Weighted (in 000)</i>	4,722	1,977
	%	%
Tea / Coffee	11	12
White milk (except in tea / coffee)	2	1
Flavoured milk	4	3
Soy drinks	1	-
Tap water	25	27
Filtered water	12+	18+
Bottled still water (nothing added)	37	30
Bottled still water (flavours and/or vitamins added)	10	10
Bottled sparkling water (with or without flavour)	5	4
Fruit juice / Fruit drinks	15	20
Cordials	7+	4+
Energy Drinks (e.g. Red Bull)	3+	11+
Sports Drinks (e.g. Powerade)	19	14
Zero sugar / diet soft drinks	11	11
Soft drinks (e.g. cola, lemonade)	17	17
Hot Chocolate / Cocoa (e.g. Milo)	-	1
NONE	2	2
Total Water with Nothing Added	63	62
Total Bottled Water	46+	37+

Q13 : Thinking about the last time you drank [Answer in Q3], if these drinks were not available, what would you have drunk instead?

Base : Those who have tried any Formulated Beverage brand in the last 12 months

- Figure is less than 0.5%

+ Difference significant between the two countries

Formulated Beverages Survey

Table 23: Non-Alcoholic Drinks that Typically Substitute Formulated Beverages when FB brands are not available

By Age Group

	Australia						New Zealand					
	14 to 17	18 to 24	25 to 34	35 to 44	45 to 54	55+	14 to 17	18 to 24	25 to 34	35 to 44	45 to 54	55+
<i>Base: Unweighted</i>	45	57	78	78	58	25	50	78	104	117	84	57
<i>Base: Weighted (in 000)</i>	699	912	1141	996	636	337	219	314	428	463	308	244
	%	%	%	%	%	%	%	%	%	%	%	%
Tea / Coffee	7	4	7	16	20*	24	5*	2*	14	16	11	24*
White milk (except in tea / coffee)	3	-	-	3	4	-	-	1	-	2	3	-
Flavoured milk	10	-	2	5	2	6	13*	5	5	-	1*	1
Soy drinks	-	-	-	1	3	-	-	-	-	-	-	2
Tap water	31	24	21	26	23	24	35	15*	25	35*	27	24
Filtered water	18	7	7	14	18	18	23	9*	21	12*	16	38*
Bottled still water (nothing added)	22*	40	38	42	35	40	17*	35	31	31	26	37
Bottled still water (flavours and/or vitamins added)	3*	12	12	11	10	8	11	20*	7	8	7	10
Bottled sparkling water (with or without flavour)	4	3	2	6	10	4	8	1	3	4	3	4
Fruit juice / Fruit drinks	29*	13	15	8*	17	10	37*	17	15	16	23	18
Cordials	13	3	6	8	4	10	8	3	6	2	3	-
Energy Drinks (e.g. Red Bull)	4	3	6	-	-	-	19	15	13	11	2*	4*
Sports Drinks (e.g. Powerade)	15	25	16	25	15	14	14	11	19	17	11	7*
Zero sugar / diet soft drinks	13	10	9	9	13	16	12	11	12	10	11	10
Soft drinks (e.g. cola, lemonade)	27	16	15	18	10	22	32*	27*	15	11	10	11
Hot Chocolate / Cocoa (e.g. Milo)	-	-	-	-	-	-	3	1	1	-	-	-
Others	2	-	-	-	-	-	-	-	-	-	-	-
NONE	9	1	1	2	2	-	2	2	2	1	2	1
WATER SUMMARY												
Total Water with Nothing Added	61	61	59	67	63	71	55	49*	62	70*	61	70
Total Bottled Water	25*	47	50	51	49	46	18*	53*	36	36	33	44

Q13 : Thinking about the last time you drank [Answer in Q3], if these drinks were not available, what would you have drunk instead?

Base : Those who have tried any Formulated Beverage brand in the last 12 months

- Figure is less than 0.5%

* Difference significant as compared to the total population for that country

Formulated Beverages Survey

Reasons for First Trial of Formulated Beverage

The most mentioned reason for first trial of Formulated Beverages was the same in both countries: “I was curious and wanted to try a new brand” (60% of Australian FB drinkers; 52% of New Zealand FB drinkers). The second most mentioned reason in Australia is: “Heard about the taste”, while the second most mentioned reason in New Zealand is: “It was good value for money”.

Table 24: Reasons for First Trial of Formulated Beverage

By Country		
	Australia	New Zealand
<i>Base: Unweighted</i>	341	490
<i>Base: Weighted (in 000)</i>	4,722	1,977
	%	%
I saw it advertised	10+	15+
I was curious and wanted to try a new brand	60+	52+
It was the only choice of this type of drink available	10	7
It was a healthy drink	10	14
It was good value for money	7+	16+
Heard about the taste	11	13
Somebody else bought it for me / gave it to me	4	4
It was free/free sample	2	2
I was thirsty	1	-
I wanted the drink bottle for re-use	-	1
I needed re-hydration/fluid replacement/energy during/after exercise	2	2
Others	4	4

Q14 : When you first tried [Answer in Q3 if tried only one brand / Q4 if tried multiple brands], what were your reasons for trying this particular drink?

Base : Those who have tried any Formulated Beverage brand in the last 12 months

- Figure is less than 0.5%

+ Difference significant between the two countries

Formulated Beverages Survey

Table 25: Reasons for First Trial of Formulated Beverage
By Age Group

	Australia						New Zealand					
	14 to 17	18 to 24	25 to 34	35 to 44	45 to 54	55+	14 to 17	18 to 24	25 to 34	35 to 44	45 to 54	55+
<i>Base: Unweighted</i>	45	57	78	78	58	25	50	78	104	117	84	57
<i>Base: Weighted (in 000)</i>	699	912	1141	996	636	337	219	314	428	463	308	244
	%	%	%	%	%	%	%	%	%	%	%	%
I saw it advertised	3*	9	19*	9	9	4	13	24	8*	19	6*	22
I was curious and wanted to try a new brand	41*	56	66	62	74*	61	46	58	51	53	56	46
It was the only choice of this type of drink available	20	13	7	7	8	3	5	4	7	7	8	14
It was a healthy drink	13	7	13	5*	6	16	19	10	15	12	14	17
It was good value for money	2*	12	8	8	5	8	9*	11	19	24*	10	18
Heard about the taste	18	11	8	6	9	20	33*	22*	9	10	5*	7
Somebody else bought it for me / gave it to me	7	9	1	1	5	-	8	1*	2*	4	6	5
It was free/free sample	4	2	1	2	2	-	-	1	6	3	2	-
I was thirsty	2	-	1	1	-	4	-	-	2	-	-	-
I wanted the drink bottle for re-use	1	-	-	-	-	-	-	2	1	-	3	-
I needed re-hydration/fluid replacement/energy during/after exercise	2	3	3	1	-	-	-	1	3	1	4	2
Others	-	2	5	7	5	4	4	1	6	5	3	5

Q14 : When you first tried [Answer in Q3 if tried only one brand / Q4 if tried multiple brands], what were your reasons for trying this particular drink?

Base : Those who have tried any Formulated Beverage brand in the last 12 months

- Figure is less than 0.5%

* Difference significant as compared to the total population for that country

Drink Choice Motivation

All respondents, irrespective of their involvement with Formulated Beverages, were asked about decision making factors when deciding what to drink. Taste is very important to the majority of Australians and New Zealanders (73% cf. 75%). “Flavour” ranked second in importance (40% cf. 37%).

Formulated Beverages Survey

Table 26: Drink Choice Motivation
By Country

	Australia				New Zealand			
	Importance				Importance			
	Very	Moderately	A Little	Not At All	Very	Moderately	A Little	Not At All
<i>Base: Unweighted</i>	1,281	1,281	1,281	1,281	810	810	810	810
<i>Base: Weighted (in 000)</i>	16,828	16,828	16,828	16,828	3,265	3,265	3,265	3,265
	%	%	%	%	%	%	%	%
Healthiness								
Contains vitamins and minerals	14	32	32	22	15	32	31	23
Keeps me healthy	37+	34	21	8	31+	37	23	9
Is nutritious	25+	35	26	14	19+	37	29	14
It has a low sugar or zero sugar content	31	29	22	18	32	28	23	17
Naturalness								
Contains no additives	31+	28	26	15+	25+	27	28	20+
Contains natural ingredients	32	36	21	12+	28	32	24	16+
Contains no artificial ingredients	31+	29	25	15+	25+	28	27	19+
Convenience								
Is easily available in shops	32	41	17	10	30	40	19	10
Can be bought in shops close to where I live / work	28	37	19	17	28	35	17	19
Is readily available at home	39+	32	17	11+	29+	29	20	22+
Sensory Appeal								
Smells nice	17	32	26	24	15	31	28	26
Looks nice	7	21	32	39	7	24	33	36
Tastes good	73	23	3	1	75	20	4	1
Has flavour	40	37	16	7+	37	37	15	11+
Price								
Is not expensive	34	41	18	6	33	42	18	7
Is good value for money	37	45	13	6	33	44	16	6
Familiarity								
Is familiar to me	15	42+	29	14	14	47+	27	11
Is what I usually drink	24	44	19	12	22	43	22	13
Is a product that most of my friends drink	-	5	14+	81+	1	5	17+	77+
Neophilia								
Is a new product	1	7	22	70	1	9	23	67
Is the first time I've seen a product	2	8	24	67	1	8	24	66

Formulated Beverages Survey

	Australia				New Zealand			
	Importance				Importance			
	Very	Moderately	A Little	Not At All	Very	Moderately	A Little	Not At All
<i>Base: Unweighted</i>	1,281	1,281	1,281	1,281	810	810	810	810
<i>Base: Weighted (in 000)</i>	16,828	16,828	16,828	16,828	3,265	3,265	3,265	3,265
A product so new that I'd be one of the first to try it	1	5	14	79	2	5	15	78
Provides Energy								
Is an energy "pick-me-up" drink	5	18+	28	49+	6	23+	29	42+
It re-hydrates my body quickly	20	35	28	17	22	37	25	17

Q15 : When you decide on something to drink, how important are the following in your decision?

Base : All Respondents

- Figure is less than 0.5%
- + Difference significant between the two countries

Formulated Beverages Survey

The following table and discussion looks at the same data, summarized to the “top two boxes” i.e. “very important” and “moderately important” combined, and compares FB drinkers and non-FB drinkers.

When comparing FB drinkers to non-FB drinkers within each country, significantly more non-FB drinkers than FB drinkers in New Zealand mentioned that a low sugar or zero sugar content is very important or moderately important for their drink choice motivation (66% cf. 55%). In Australia there was no significant difference between non-FB drinkers and FB drinkers for this same issue.

Taste is very important or moderately important to the vast majority of FB drinkers in both Australia and New Zealand (94% cf. 96%). “Good value for money” ranked second as being very important or moderately important for FB drinkers for drink choice motivation for Australians and New Zealanders (81% cf. 79%).

Table 27: Drink Choice Motivation
Very Important + Moderately Important (Top 2 Boxes) Rating
By Country and By Drinker Type (Drank FB in the Last 12 Months)

	Australia			New Zealand		
	Total	FB Drinker	Non-FB Drinker	Total	FB Drinker	Non-FB Drinker
<i>Base: Unweighted</i>	1,281	341	940	810	490	320
<i>Base: Weighted (in 000)</i>	16,828	4,722	12,106	3,265	1,977	1,288
	%	%	%	%	%	%
Healthiness						
Contains vitamins and minerals	46	47	45+	47	52^	39+^
Keeps me healthy	71	64^	74^	68	65^	72^
Is nutritious	60	53^	63^	56	56	57
It has a low sugar or zero sugar content	60	57	61	59	55^	66^
Naturalness						
Contains no additives	59+	53^	62^	52+	46+ ^	60^
Contains natural ingredients	68+	63+^	70^	60+	55+^	68^
Contains no artificial ingredients	60+	53^	62^	53+	47^	63^
Convenience					^	
Is easily available in shops	73	74	72+	71	75^	64+^
Can be bought in shops close to where I live / work	65	70^	63^	64	68^	57^
Is readily available at home	71+	53+^	79^	58+	44+^	79^
Sensory Appeal						
Smells nice	49	50	49	46	46	46
Looks nice	28	30	28	30	32	27

Formulated Beverages Survey

	Australia			New Zealand		
	Total	FB Drinker	Non-FB Drinker	Total	FB Drinker	Non-FB Drinker
<i>Base: Unweighted</i>	1,281	341	940	810	490	320
<i>Base: Weighted (in 000)</i>	16,828	4,722	12,106	3,265	1,977	1,288
Tastes good	95	94	96+	95	96	93+
Has flavour	77	73	79+	74	75	73+
Price						
Is not expensive	75	77	74	75	78^	70^
Is good value for money	81	81	81+	77	79	75+
Familiarity						
Is familiar to me	57+	46+^	61^	61+	58+^	67^
Is what I usually drink	68	52^	74^	65	56^	78^
Is a product that most of my friends drink	5	6	5	6	7^	3^
Neophilia						
Is a new product	8	12^	7^	9	12^	6^
Is the first time I've seen a product	9	13^	8^	10	12^	7^
A product so new that I'd be one of the first to try it	6	7	6	7	9^	4^
Provides Energy						
Is an energy "pick-me-up" drink	24+	34^	19+^	29+	39^	14+^
It re-hydrates my body quickly	55	60	54	59	63^	52^

Q15 : When you decide on something to drink, how important are the following in your decision?

Base : All Respondents

- Figure is less than 0.5%

+ Difference significant between the two countries

^ Difference significant between FB drinkers and non-FB drinkers within each country

Formulated Beverages Survey

Table 28: Drink Choice Motivation
Very Important + Moderately Important (Top 2 Boxes) Rating
By Age Group

	Australia						New Zealand					
	14 to 17	18 to 24	25 to 34	35 to 44	45 to 54	55+	14 to 17	18 to 24	25 to 34	35 to 44	45 to 54	55+
<i>Base: Unweighted</i>	74	127	203	249	268	360	60	101	132	162	151	204
<i>Base: Weighted (in 000)</i>	1128	2016	2836	3012	2832	5003	253	404	536	640	555	876
	%	%	%	%	%	%	%	%	%	%	%	%
Healthiness												
Contains vitamins and minerals	47	39	43	38*	47	54*	42	45	47	50	48	45
Keeps me healthy	56*	60*	66	66	76*	81*	52*	61	66	71	71	71
Is nutritious	49	54	58	54	63	67*	49	52	57	60	59	55
It has a low sugar or zero sugar content	41*	47*	56	54	69*	70*	27*	57	55	55	68*	71*
Naturalness												
Contains no additives	42*	40*	50*	55	70*	73*	23*	31*	50	56	61*	61*
Contains natural ingredients	45*	47*	64	63	78*	81*	30*	42*	55	63	72*	71*
Contains no artificial ingredients	45*	38*	53*	56	69*	72*	20*	31*	53	56	64*	65*
Convenience												
Is easily available in shops	62*	75	75	73	74	71	75	78	70	71	72	65
Can be bought in shops close to where I live / work	55	75*	70	65	63	60*	61	76*	68	60	63	58
Is readily available at home	59*	60*	66	69	75	81*	44*	45*	48*	47*	65	77*
Sensory Appeal												
Smells nice	52	58*	52	48	50	44*	54	49	53	39*	54*	39*
Looks nice	43*	37*	27	23*	28	25	47*	39	25	31	36	21*
Tastes good	96	94	97	96	94	95	97	93	98*	95	93	93
Has flavour	87*	77	77	76	74	78	84*	75	71	72	78	72
Price												
Is not expensive	79	82	79	75	73	70	84	80	83*	75	73	66*
Is good value for money	74	82	84	81	78	82	77	75	80	76	80	77
Familiarity												
Is familiar to me	57	61	50*	51*	54	66*	59	66	52*	54*	63	70
Is what I usually drink	66	71	62*	62*	64	77*	71	61	59	57*	69	72*
Is a product that most of my friends drink	18*	9	3*	2*	4	5	15*	8	4	4	5	4
Neophilia												

Formulated Beverages Survey

	Australia						New Zealand					
	14 to 17	18 to 24	25 to 34	35 to 44	45 to 54	55+	14 to 17	18 to 24	25 to 34	35 to 44	45 to 54	55+
<i>Base: Unweighted</i>	74	127	203	249	268	360	60	101	132	162	151	204
<i>Base: Weighted (in 000)</i>	1128	2016	2836	3012	2832	5003	253	404	536	640	555	876
Is a new product	22*	10	7	6	9	7	29*	9	10	7	9	6*
Is the first time I've seen a product	17	13	9	7	7	8	21*	12	7	7	9	10
A product so new that I'd be one of the first to try it	15*	9	4*	4	4	7	16	7	7	7	6	6
Provides Energy												
Is an energy "pick-me-up" drink	34	36*	25	22	21	18*	44*	42*	32	29	26	21*
It re-hydrates my body quickly	57	55	55	51	58	57	52	55	64	57	66	54

Q15 : When you decide on something to drink, how important are the following in your decision?

Base : All Respondents

- Figure is less than 0.5%

* Difference significant as compared to the total population for that country

Formulated Beverages Survey

Comparison of Beverages

The majority of Australians and New Zealanders perceived Formulated Beverages to be healthier than soft drinks (55% in Australia; 67% in New Zealand) and having more vitamins and minerals than soft drinks (59% in Australia; 69% in New Zealand).

Table 29: Comparison of Perceptions of Beverages against Formulated Beverages

By Country

	Australia						New Zealand					
	Tap Water	Bottled Still Water	Soft Drinks	Fruit Juice	Milk	Zero Sugar / Diet Soft Drinks	Tap Water	Bottled Still Water	Soft Drinks	Fruit Juice	Milk	Zero Sugar / Diet Soft Drinks
<i>Base: Unweighted</i>	1,281	1,281	1,281	1,281	1,281	1,281	810	810	810	810	810	810
<i>Base: Weighted (in 000)</i>	16,828	16,828	16,828	16,828	16,828	16,828	3,265	3,265	3,265	3,265	3,265	3,265
	%	%	%	%	%	%	%	%	%	%	%	%
FBs are perceived as												
More healthy than	11+	6+	55+	10+	6	36+	16+	11+	67+	21+	9	43+
As healthy as	22+	29	17+	31+	20+	26	26+	28	13+	42+	26+	25
Less healthy than	50	46	9	42+	55	13+	48	50	11	27+	54	19+
Can't Say	17+	19+	19+	18+	19+	25+	9+	10+	9+	10+	12+	13+
FBs are perceived as having												
More sugar than	72+	69+	8	16	51+	37	78+	75+	8	14	60+	41
Same sugar content as	3	6	20	29+	9	19	3	5	22	35+	9	22
Less sugar than	10	9	51+	31+	14	17	10	11	60+	40+	14	19
Can't Say	15+	16+	21+	24+	25+	28+	9+	9+	10+	12+	16+	17+
FBs are perceived as having												
More vitamins & minerals than	50+	50+	59+	11+	10+	53+	65+	64+	69+	21+	21+	64+
Same vitamins & minerals than	13+	15+	9	25+	17	13	9+	11+	8	34+	20	12
Less vitamins & minerals than	9	8	6+	36+	42+	5	11	10	9+	28+	36+	7
Can't Say	28+	27+	25+	28+	31+	29+	15+	15+	15+	17+	23+	18+

Q16 : Here are the drinks we showed you earlier. While you may not have tried all of these, we are interested in your general impressions. Would you say that these drinks are ...?

Base : All Respondents

- Figure is less than 0.5%

+ Difference significant between the two countries

Formulated Beverages Survey

The majority of FB drinkers from both Australian and New Zealand perceived Formulated Beverages to be healthier than soft drinks (76% in Australia; 77% in New Zealand) and having more vitamins and minerals than soft drinks (79% in Australia; 76% in New Zealand).

Table 30: Comparison of Beverages against Formulated Beverages
Among those who drank Formulated Beverages in the last 12 months

	Australia						New Zealand					
	Tap Water	Bottled Still Water	Soft Drinks	Fruit Juice	Milk	Zero Sugar / Diet Soft Drinks	Tap Water	Bottled Still Water	Soft Drinks	Fruit Juice	Milk	Zero Sugar / Diet Soft Drinks
<i>Base: Unweighted</i>	341	341	341	341	341	341	490	490	490	490	490	490
<i>Base: Weighted (in 000)</i>	4,722	4,722	4,722	4,722	4,722	4,722	1,977	1,977	1,977	1,977	1,977	1,977
	%	%	%	%	%	%	%	%	%	%	%	%
FBs are perceived as												
More healthy than	17	10	76	19+	11	55	19	12	77	26+	9	52
As healthy as	26	37	11	41+	30	24	27	32	9	48+	31	25
Less healthy than	47	45	9	31+	48	12+	49	50	10	20+	50	18+
Can't Say	10+	8	4	9	12	9	5+	6	4	6	9	6
FBs are perceived as having												
More sugar than	79	77	7	12	55+	44	80	77	9	14	62+	43
Same sugar content as	3	6	17	36	12	22	3	6	20	38	10	26
Less sugar than	12	11	70	42	17	23	13	12	68	42	16	22
Can't Say	7	6	6+	10+	16	11	4	4	3+	6+	12	9
FBs are perceived as having												
More vitamins & minerals than	61+	62	79	15+	12+	74	70+	69	76	25+	25+	72
Same vitamins & minerals than	16+	18+	7	36	25	10	9+	12+	6	39	23	10
Less vitamins & minerals than	10	9	5+	36+	46+	5	11	11	10+	25+	32+	7
Can't Say	13	11	9	13	17	11	10	9	8	11	19	11

Q16 : Here are the drinks we showed you earlier. While you may not have tried all of these, we are interested in your general impressions. Would you say that these drinks are ...?

Base : Those who have tried any Formulated Beverage brand in the Last 12 Months

- Figure is less than 0.5%

+ Difference significant between the two countries

Formulated Beverages Survey

**Table 31: Comparison of Beverages against Formulated Beverages
By Age Group**

	Australia						New Zealand					
	14 to 17	18 to 24	25 to 34	35 to 44	45 to 54	55+	14 to 17	18 to 24	25 to 34	35 to 44	45 to 54	55+
<i>Base: Unweighted</i>	74	127	203	249	268	360	60	101	132	162	151	204
<i>Base: Weighted (in 000)</i>	1128	2016	2836	3012	2832	5003	253	404	536	640	555	876
	%	%	%	%	%	%	%	%	%	%	%	%
FB vs. Tap Water												
More healthy than Tap Water	11	12	15	11	11	9*	23	13	15	18	20	13
As healthy as Tap Water	24	34*	21	26	21	16*	12*	28	25	27	29	28
Less healthy than Tap Water	59	47	50	52	45	50	60	53	55	50	42	42*
Can't Say	6*	7*	15	12*	23*	25*	5	7	5*	5*	9	17*
Has more sugar than Tap Water	75	77	76	77	70	64	73	83	85*	82	72	72*
Same sugar content as Tap Water	6	3	4	4	5	1*	4	3	1*	3	7*	2
Has less sugar than Tap Water	17	12	10	8	6*	10	17	8	12	11	9	9
Can't Say	2*	8*	9*	11*	18	25*	5	7	3*	4*	12	17*
More vitamins & minerals than Tap Water	40	52	57*	58*	49	44*	50*	66	72	76*	70	53*
Same vitamins & minerals than Tap Water	18	19	16	12	11	9*	11	10	8	8	9	11
Less vitamins & minerals than Tap Water	23*	14	8	8	9	6*	21*	11	14	8	9	8
Can't Say	19	15*	19*	22*	32	41*	18	14	6*	8*	13	28*
FB vs. Bottled Still Water												
More healthy than Bottled Still Water	5	5	7	8	8	6	18	5*	9	10	17*	10
As healthy as Bottled Still Water	29	37*	30	36*	25	22*	28	27	24	30	32	28
Less healthy than Bottled Still Water	56	51	50	45	41	43	44	62*	62*	55	40*	43*
Can't Say	10*	7*	13*	11*	26*	29*	9	7	4*	5*	11	19*
Has more sugar than Bottled Still Water	68	77	75*	72	66	63*	74	79	82*	81*	70	70*
Same sugar content as Bottled Still Water	13	6	9	8	7	2*	10	7	4	4	6	3

Formulated Beverages Survey

	Australia						New Zealand					
	14 to 17	18 to 24	25 to 34	35 to 44	45 to 54	55+	14 to 17	18 to 24	25 to 34	35 to 44	45 to 54	55+
<i>Base: Unweighted</i>	74	127	203	249	268	360	60	101	132	162	151	204
<i>Base: Weighted (in 000)</i>	1128	2016	2836	3012	2832	5003	253	404	536	640	555	876
Has less sugar than Bottled Still Water	15	10	9	6*	6	10	14	8	11	10	12	10
Can't Say	3*	7*	7*	15	20	25*	3*	6	3*	6	12	16*
More vitamins & minerals than Bottled Still Water	38*	52	55	56*	49	44*	46*	66	70	77*	66	55*
Same vitamins & minerals than Bottled Still Water	21	28*	18	15	13	8*	268	9	11	7*	12	9
Less vitamins & minerals than Bottled Still Water	21*	12	5	7	7	6	12	12	13	8	8	7
Can't Say	20	8*	22*	22*	31	41*	16	13	6*	8*	13	28*
FB vs. Soft Drinks												
More healthy than Soft Drinks	68*	77*	70*	62*	54	32*	66	83*	75*	72	63	52*
As healthy as Soft Drinks	16	9*	12*	16	18	23*	8	11	11	17	15	12
Less healthy than Soft Drinks	12	9	7	10	7	11	19	6*	10	8	12	13
Can't Say	3*	4*	12*	13*	21	34*	7	1*	3*	3*	9	23*
Has more sugar than Soft Drinks	15	7	6	7	6	8	11	3*	8	8	8	11
Same sugar content as Soft Drinks	17	13*	20	21	20	22	21	20	28	23	19	20
Has less sugar than Soft Drinks	64*	73*	65*	61*	46	29*	64	75*	62	65	63	46*
Can't Say	4*	6*	8*	11*	27*	41*	4*	2*	2*	4*	10	23*
More vitamins & minerals than Soft Drinks	68	82*	70*	69*	55	38*	59	87*	80*	80*	69	48*
Same vitamins & minerals than Soft Drinks	12	5*	7	10	10	11	8	5	7	5	11	10
Less vitamins & minerals than Soft Drinks	10	7	7	6	6	5	24*	2*	5	*5	8	12
Can't Say	10*	6*	16*	16*	30	46*	9	6*	8*	9*	12	30*
FB vs. Zero Sugar / Diet Soft Drinks												
More healthy than Zero Sugar / Diet Soft Drinks	53*	53*	47*	41	33	17*	42	59*	47	52*	48	24*
As healthy as Zero Sugar / Diet Soft Drinks	29	23	27	24	29	27	27	23	28	23	26	25
Less healthy than Zero Sugar / Diet Soft Drinks	14	13	9*	13	9*	19*	29	14	18	17	15	22

Formulated Beverages Survey

	Australia						New Zealand					
	14 to 17	18 to 24	25 to 34	35 to 44	45 to 54	55+	14 to 17	18 to 24	25 to 34	35 to 44	45 to 54	55+
<i>Base: Unweighted</i>	74	127	203	249	268	360	60	101	132	162	151	204
<i>Base: Weighted (in 000)</i>	1128	2016	2836	3012	2832	5003	253	404	536	640	555	876
Can't Say	4*	11*	17*	23	29*	37*	2*	4*	7*	8*	11	29*
Has more sugar than Zero Sugar / Diet Soft Drinks	45	35	39	45*	32	33	45	52*	42	49*	34	34*
Same sugar content as Zero Sugar / Diet Soft Drinks	24	23	22	22	16	14*	21	27	29	20	21	18
Has less sugar than Zero Sugar / Diet Soft Drinks	25	26*	21	17	14	9*	24	19	22	21	24	13*
Can't Say	6*	16*	17*	17*	38*	44*	10	2*	7*	11*	21	36*
More vitamins & minerals than Zero Sugar / Diet Soft Drinks	68*	74*	66*	60*	48	31*	57	84*	75*	73*	66	41*
Same vitamins & minerals than Zero Sugar / Diet Soft Drinks	13	6*	11	18*	13	14	13	6*	9	10	12	15*
Less vitamins & minerals than Zero Sugar / Diet Soft Drinks	8	6	6	4	3	4	15	4	6	5	5	8
Can't Say	11*	14*	16*	18*	36*	51*	15	6*	9*	11*	17	36*
FB vs. Fruit Juice												
More healthy than Fruit Juice	19	14	16*	12	7	3*	22	30	26	22	20	12*
As healthy as Fruit Juice	39	38	39*	37*	31	16*	42	50	44	52*	43	30*
Less healthy than Fruit Juice	39	38	29*	37*	39	55*	24	17*	25	22	27	39*
Can't Say	4*	9*	15	14	23*	25*	12	4*	5*	4*	10	20*
Has more sugar than Fruit Juice	14	16	11*	11*	17	23*	33*	7*	9*	15	10	15
Same sugar content as Fruit Juice	37	37	36*	30	26	21*	38	44	43*	35	31	27*
Has less sugar than Fruit Juice	38	39*	38*	42*	26	18*	20*	46	44	43	49*	31*
Can't Say	11*	8*	15*	17*	32*	38*	9	3*	5*	7*	10	27*
More vitamins & minerals than Fruit Juice	13	17	11	11	14	7*	17	30	23	31*	18	12*
Same vitamins & minerals than Fruit Juice	36	32	28	31*	20*	16*	44	34	39	36	34	27*
Less vitamins & minerals than Fruit Juice	37	41	41	38	29*	33	28	26	30	21*	28	32
Can't Say	13*	10*	20*	19*	37*	43*	12	11	7*	12	20	29*
FB vs. Milk												
More healthy than Milk	10	5	11*	8	5	4*	15	11	8	7	11	7
As healthy as Milk	34*	29*	22	20	19	12*	26	28	34*	31	28	14*

Formulated Beverages Survey

	Australia						New Zealand					
	14 to 17	18 to 24	25 to 34	35 to 44	45 to 54	55+	14 to 17	18 to 24	25 to 34	35 to 44	45 to 54	55+
<i>Base: Unweighted</i>	74	127	203	249	268	360	60	101	132	162	151	204
<i>Base: Weighted (in 000)</i>	1128	2016	2836	3012	2832	5003	253	404	536	640	555	876
Less healthy than Milk	49	55	51	56	52	61*	51	50	53	53	50	61*
Can't Say	7*	11*	17	17	25*	23*	8	11	6*	9	12	19*
Has more sugar than Milk	54	56	55	51	47	48	61	68	69*	59	58	54*
Same sugar content as Milk	14	11	9	12	10	5*	7	8	7	14*	7	8
Has less sugar than Milk	19	19	18	12	10*	14	22	10	13	13	17	14
Can't Say	13*	14*	18*	25	33*	33*	10	13	11*	13	18	24*
More vitamins & minerals than Milk	21*	14	12	7*	9	6*	22	24	33*	23	21	10*
Same vitamins & minerals than Milk	24	29*	19	18	13*	11*	23	24	22	27*	21	11*
Less vitamins & minerals than Milk	37	43	44	52*	38	39	35	32	31	28*	36	47*
Can't Say	18*	15*	25	23*	39*	44*	20	19	14*	22	22	32*

Q16 : Here are the drinks we showed you earlier. While you may not have tried all of these, we are interested in your general impressions. Would you say that these drinks are ...?

Base : All Respondents

- Figure is less than 0.5%

* Difference significant as compared to the total population for that country

APPENDIX ONE

TECHNICAL NOTES

Chi-Square Technical Notes

Chi-square tests were conducted on the age and location groups for both the New Zealand respondents and the Australian respondents compared to the New Zealand and Australian population patterns. Chi-square is a non-parametric test of statistical significance for bivariate tabular analysis. Statistical significance testing shows the degree of confidence you can have in accepting or rejecting a hypothesis.

Chi Square Calculation Australia											Pop	Survey	Chi Square	
	Brisbane	Reg QLD	Sydney	NSW/ACT	Melbourne	Reg Vic	TAS	Adelaide	Reg SA/NT	Perth	Reg WA	TOTAL		TOTAL
14-15	0.36320	0.36320	0.69007	0.53874	0.67191	0.21186	0.09685	0.18765	0.10896	0.30872	0.10896	3.65012	1.40000	1.38709
16-17	0.30266	0.32082	0.64165	0.45400	0.52058	0.21186	0.07264	0.16344	0.06659	0.21186	0.06659	3.03269	4.40000	0.61646
18-19	0.36320	0.40557	0.87167	0.49031	0.77482	0.29056	0.09685	0.23608	0.09685	0.30872	0.07869	4.01332	2.70000	0.42977
20-24	0.79903	0.82324	1.79782	1.00484	1.48910	0.49031	0.17554	0.46610	0.16344	0.65375	0.18160	8.04479	7.30000	0.06895
25-29	0.76271	0.79903	1.99153	0.87772	1.65254	0.41162	0.14528	0.42978	0.18160	0.58717	0.16344	8.00242	5.90000	0.55235
30-34	0.85351	0.90799	2.08232	1.18644	1.75545	0.56295	0.19976	0.47215	0.24818	0.65981	0.26029	9.18886	10.00000	0.07160
35-39	0.69007	0.81719	1.73123	1.02906	1.50121	0.50242	0.19370	0.41162	0.24213	0.61743	0.24818	7.98426	10.70000	0.92372
40-44	0.83535	0.98668	1.93099	1.31961	1.62833	0.61138	0.20581	0.49637	0.28450	0.65375	0.27240	9.22518	8.70000	0.02990
45-49	0.83535	1.02300	2.02179	1.30145	1.74334	0.71429	0.23002	0.56901	0.24818	0.71429	0.29056	9.69128	9.90000	0.00450
50-54	0.81114	0.88983	1.87651	1.23487	1.67676	0.58717	0.21186	0.55085	0.22397	0.67191	0.20581	8.94068	11.00000	0.47433
55-59	0.70823	0.78692	1.57385	1.07143	1.36199	0.57506	0.18765	0.44189	0.20581	0.57506	0.18160	7.66949	10.50000	1.04463
60-64	0.45400	0.68402	1.05932	0.91404	1.02300	0.39346	0.16949	0.36925	0.15133	0.40557	0.15133	5.77482	7.50000	0.51538
65-69	0.35714	0.53269	0.92010	0.79298	0.78692	0.39346	0.13317	0.26029	0.13923	0.33898	0.13923	4.79419	5.60000	0.13544
70+	0.70218	1.10169	1.96126	1.70702	1.58596	0.85351	0.28450	0.64165	0.29056	0.62954	0.23002	9.98789	4.50000	3.01535
TOTAL POP	8.83777	10.44189	21.15012	13.92252	18.17191	6.80993	2.40315	5.69613	2.65133	7.33656	2.57869	100	100	9.26948
FB SURVEY	10.10000	11.20000	14.30000	15.30000	17.60000	7.90000	3.70000	7.30000	3.40000	7.10000	2.20000	100		(22.362 at 13 degree of
Chi-Square	0.18027	0.05504	2.21862	0.13629	0.01800	0.17449	0.69984	0.45161	0.21140	0.00763	0.05561	4.20881		(18.307 at 10 degree of difference)

Chi Square Calculations New Zealand						POP	FB Survey	Chi Square
	Auckland	Wellington	Other Northern	Canterbury	Other Southern	TOTAL	Total	
14-15	1.11283	0.37094	1.36012	0.52550	0.43277	3.80216	1.50000	1.39393
16-17	1.14374	0.46368	1.29830	0.40185	0.46368	3.77125	5.90000	1.20161
18-19	1.48377	0.30912	1.51468	0.37094	0.37094	4.04946	3.30000	0.13871
20-24	2.62751	1.17465	2.50386	1.23648	1.02009	8.56260	9.10000	0.03373
25-29	1.94745	0.71097	1.85471	0.68006	0.46368	5.65688	4.90000	0.10127
30-34	3.61669	1.39104	3.27666	1.42195	1.17465	10.88099	11.40000	0.02476
35-39	2.56569	0.95827	2.75116	1.02009	0.95827	8.25348	9.50000	0.18826
40-44	2.93663	1.20556	3.40031	1.32921	1.11283	9.98454	10.50000	0.02661
45-49	3.09119	1.08192	3.24575	1.29830	1.20556	9.92272	8.50000	0.20399
50-54	2.10201	0.86553	2.87481	1.11283	0.86553	7.82071	10.10000	0.66428
55-59	2.07110	0.83462	2.16383	1.02009	0.95827	7.04791	10.60000	1.79022
60-64	1.63833	0.58733	2.22566	0.61824	0.74189	5.81144	5.70000	0.00214
65-69	1.57651	0.55641	2.10201	0.98918	0.83462	6.05873	4.90000	0.22161
70+	2.00927	0.92736	3.18393	1.14374	1.11283	8.37713	3.80000	2.50087
TOTAL POP	29.92272	11.43740	33.75580	13.16847	11.71561	100	100	8.49198
TOTAL FB Survey	38.30000	11.40000	26.20000	12.60000	11.50000	100		(22.362 at 13 degree of c
Chi-Square	2.34534	0.00012	1.69127	0.02454	0.00397	4.06523		(9.488 at 4 degree of freedom)

The tests showed that within both countries, for both age and location, the differences between the sample distribution and the population distribution were not statistically significant. .

Significance Testing Technical Notes

Statistical significance testing of the survey results has been conducted for individual cells within each country and between the two countries. Individual cells were compared with corresponding row totals for significance testing within each country. For significance testing between the two countries, individual cells from Australia were compared with corresponding cells from New Zealand.

Significance tests were conducted at the 95 percent confidence level using a two-tailed test. If significance occurs at the 95 percent significance level, it means that there is less than a 5 percent probability that a difference occurred by chance. The test applied is a simple large-sample two-tailed z -test. In the case of proportions this is equivalent to a 2×2 χ^2 (chi-squared) test. Each cell was tested independently, which ensures consistency of testing.

APPENDIX TWO

FINAL QUESTIONNAIRE

Just to ensure we have a representative sample, in which of these age groups do you belong?

14-15.....	1
16-17.....	2
18-19.....	3
20-24.....	4
25-29.....	5
30-34.....	6
35-39.....	7
40-44.....	8
45-49.....	9
50-54.....	10
55-59.....	11
60-64.....	12
65-69.....	13
70+.....	14

Please indicate the area in which you live.

Brisbane.....	1
Regional Queensland.....	2
Sydney.....	3
Regional NSW/ ACT.....	4
Melbourne.....	5
Regional Victoria.....	6
Tasmania.....	7
Adelaide.....	8
Regional South Australia /Northern Territory.....	9
Perth.....	10
Regional Western Australia.....	11

Please indicate the area in which you live.

Auckland.....	1
Wellington.....	2
Other Northern.....	3
Canterbury.....	4
Other Southern.....	5

1. This question is about what you drink in a typical week. Which of the following types of non-alcoholic drinks would you normally drink?

SELECT ALL THAT APPLY

Tea / Coffee.....	1,
White milk (apart from milk in tea or coffee).....	2,
Flavoured milk.....	3,
Soy drinks (e.g. So Good, Vitasoy etc).....	4,
Tap water.....	5,
Filtered water.....	6,
Bottled still water (nothing added).....	7,
Bottled still water (flavours and/or vitamins added).....	8,
Bottled sparkling water (with or without flavour).....	9,
Fruit juice / fruit drinks.....	10,
Cordials.....	11,
Energy drinks (e.g. Red Bull, Red Eye etc).....	12,
Sports drinks (e.g. Powerade, Gatorade etc).....	13,
Zero sugar / diet soft drinks.....	14,
Soft drinks (e.g. cola, lemonade etc).....	15,
Other (\$IT1Click here and enter in box below\$IT2).....	97,

2. In a typical week, which of the following would you drink the most of?

SELECT ONE ANSWER ONLY

Tea / Coffee.....	1
White milk (apart from milk in tea or coffee).....	2
Flavoured milk.....	3
Soy drinks (e.g. So Good, Vitasoy etc).....	4
Tap water.....	5
Filtered water.....	6
Bottled still water (nothing added).....	7
Bottled still water (flavours and/or vitamins added).....	8
Bottled sparkling water (with or without flavour).....	9
Fruit juice / fruit drinks.....	10
Cordials.....	11
Energy drinks (e.g. Red Bull, Red Eye etc).....	12
Sports drinks (e.g. Powerade, Gatorade etc).....	13
Zero sugar / diet soft drinks.....	14
Soft drinks (e.g. cola, lemonade etc).....	15
%0%68.....	97

3. After %69., which of the following would you drink the \$UL1second\$UL2 most of?

SELECT ONE ANSWER ONLY

Tea / Coffee.....	1
White milk (apart from milk in tea or coffee).....	2
Flavoured milk.....	3
Soy drinks (e.g. So Good, Vitasoy etc).....	4
Tap water.....	5
Filtered water.....	6
Bottled still water (nothing added).....	7
Bottled still water (flavours and/or vitamins added).....	8
Bottled sparkling water (with or without flavour).....	9
Fruit juice / fruit drinks.....	10
Cordials.....	11
Energy drinks (e.g. Red Bull, Red Eye etc).....	12
Sports drinks (e.g. Powerade, Gatorade etc).....	13
Zero sugar / diet soft drinks.....	14
Soft drinks (e.g. cola, lemonade etc).....	15
%0%68.....	97

4. After %69. AND %70., which of the following would you drink the \$UL1third\$UL2 most of?

SELECT ONE ANSWER ONLY

Tea / Coffee.....	1
White milk (apart from milk in tea or coffee).....	2
Flavoured milk.....	3
Soy drinks (e.g. So Good, Vitasoy etc).....	4
Tap water.....	5
Filtered water.....	6
Bottled still water (nothing added).....	7
Bottled still water (flavours and/or vitamins added).....	8
Bottled sparkling water (with or without flavour).....	9
Fruit juice / fruit drinks.....	10
Cordials.....	11
Energy drinks (e.g. Red Bull, Red Eye etc).....	12
Sports drinks (e.g. Powerade, Gatorade etc).....	13
Zero sugar / diet soft drinks.....	14
Soft drinks (e.g. cola, lemonade etc).....	15
%0%68.....	97

+-----+
 | %55. %56. |
 +-----+

5. New types of non-alcoholic water based beverages are now becoming more common. From the following please select all the drinks you have tried in the last 12 months ...

SELECT ALL THAT APPLY

Mizone	1,
.....	
G Force	2,
.....	
Thorpedo	3,
.....	
Play	4,
.....	
Temple	5,
Hydrotherapy	6,
.....	
Waterplus	7,
.....	
Aquashot	8,
.....	
E2	9,
.....	
Charlies	10,
Sportswater	
.....	
None of these	
.....	

%58.

6. You have tried %73. %74. .

How often do you drink %329,/these drinks (in total)/ this drink/ ?

Not a regular drinker, only tried them once or twice.....	1
Once every few months.....	2
Once a month.....	3
Once a fortnight.....	4
Once a week.....	5
Once every three or four days.....	6
Every second day.....	7
Once a day.....	8
Several times a day.....	9
Other (\$IT1Click here and enter in box below\$IT2).....	97

Has tried multiple drinks at q3, ask:

**7. Which of these do you drink the most?
SELECT ONE ANSWER ONLY**

Mizone	1,
.....	
G Force	2,
.....	
Thorpedo	3,
.....	
Play	4,
.....	
Temple	
Hydrotherapy	5,
.....	
Waterplus	6,
.....	
Aquashot	7,
.....	
E2	8,
.....	
Charlies	
Sportswater	9,
.....	
None of these	10,
.....	

if answer to Q6 is greater than or equal to once a fortnight, ask:

%58.

**8. On a typical day when you drink %73. %74., how much would you drink of %362,/these drinks (in total)/ this drink/ ?
(A standard bottle is 600ml in size)**

Less than one bottle.....	1
One bottle.....	2
Two bottles.....	3
Three bottles.....	4
More than 3 bottles (\$IT1Click here and enter how many bottles in box below\$IT2).....	97

9. On a typical day when you drink %73. %74., what other non-alcoholic drinks would you also drink?

SELECT ALL THAT APPLY

Tea / Coffee.....	1,
White milk (apart from milk in tea or coffee).....	2,
Flavoured milk.....	3,
Soy drinks (e.g. So Good, Vitasoy etc).....	4,
Tap water.....	5,
Filtered water.....	6,
Bottled still water (nothing added).....	7,
Bottled still water (flavours and/or vitamins added).....	8,
.....	
Bottled sparkling water (with or without flavour).....	9,
Fruit juice / fruit drinks.....	10,
Cordials.....	11,
Energy drinks (e.g. Red Bull, Red Eye etc).....	12,
Sports drinks (e.g. Powerade, Gatorade etc).....	13,
Zero sugar / diet soft drinks.....	14,
Soft drinks (e.g. cola, lemonade etc).....	15,
Other (\$IT1Click here and enter in box below\$IT2).....	97,

10. Thinking of your TOTAL non-alcoholic fluid consumption. On a typical day when you have drinks like %73. %74., what would be your total consumption of fluids?

Less than one litre.....	1
About one litre.....	2
More than one litre but less than two litres.....	3
About two litres.....	4
More than two litres but less than three litres.....	5
About three litres.....	6
More than three litres (\$IT1Click here and enter how many litres in box below\$IT2).....	97

11. When you drink %73. %74., does it ...

Increase your total fluid consumption for the day, (but not replace some other drink).....	1
Replace some other drink on the day, (but not increase your total fluid consumption).....	2
Both increase your total fluid consumption, as well as replace some other drink.....	3

If answer to above is b or c, ask:

12. When you drink %73. %74., what other drink or drinks is it typically instead of?

SELECT ALL THAT APPLY

Tea / Coffee.....	1,
White milk (apart from milk in tea or coffee).....	2,
Flavoured milk.....	3,
Soy drinks (e.g. So Good, Vitasoy etc).....	4,
Tap water.....	5,
Filtered water.....	6,
Bottled still water (nothing added).....	7,
Bottled still water (flavours and/or vitamins added).....	8,
Bottled sparkling water (with or without flavour).....	9,
Fruit juice / fruit drinks.....	10,
Cordials.....	11,
Energy drinks (e.g. Red Bull, Red Eye etc).....	12,
Sports drinks (e.g. Powerade, Gatorade etc).....	13,
Zero sugar / diet soft drinks.....	14,
Soft drinks (e.g. cola, lemonade etc).....	15,
Other (\$IT1Click here and enter in box below\$IT2).....	97,
None/ does not substitute anything.....	99,

13. Thinking about the last time you drank %73. %74., if %382,/these drinks/
 this drink/ had not been available, what would you have drunk instead?
 SELECT ALL THAT APPLY

Tea / Coffee.....	1,
White milk (apart from milk in tea or coffee).....	2,
Flavoured milk.....	3,
Soy drinks (e.g. So Good, Vitasoy etc).....	4,
Tap water.....	5,
Filtered water.....	6,
Bottled still water (nothing added).....	7,
Bottled still water (flavours and/or vitamins added).....	8,
Bottled sparkling water (with or without flavour).....	9,
Fruit juice / fruit drinks.....	10,
Cordials.....	11,
Energy drinks (e.g. Red Bull, Red Eye etc).....	12,
Sports drinks (e.g. Powerade, Gatorade etc).....	13,
Zero sugar / diet soft drinks.....	14,
Soft drinks (e.g. cola, lemonade etc).....	15,
Other (\$IT1Click here and enter in box below\$IT2).....	97,
None/ does not substitute anything.....	99,

14. When you first tried %77., what were your reasons for trying this particular
 drink?

SELECT ALL THAT APPLY

I saw it advertised.....	1,
I was curious and wanted to try a new brand.....	2,
It was the only choice of this type of drink available.....	3,
It was a healthy drink.....	4,
It was good value for money.....	5,
Heard about the taste.....	6,
Other (\$IT1Click here and enter in box below\$IT2).....	97,

-----+
 | 15A. When you decide on something to drink, how important are the following |
 | in your decision? |
 -----+

Contains vitamins and minerals

- Not important at all..... 1
- A little important..... 2
- Moderately important..... 3
- Very important..... 4

Keeps me healthy

- Not important at all..... 1
- A little important..... 2
- Moderately important..... 3
- Very important..... 4

Is nutritious

- Not important at all..... 1
- A little important..... 2
- Moderately important..... 3
- Very important..... 4

Contains no additives

- Not important at all..... 1
- A little important..... 2
- Moderately important..... 3
- Very important..... 4

Contains natural ingredients

- Not important at all..... 1
- A little important..... 2
- Moderately important..... 3
- Very important..... 4

Contains no artificial ingredients

- Not important at all..... 1
- A little important..... 2
- Moderately important..... 3
- Very important..... 4

Is easily available in shops

- Not important at all..... 1
- A little important..... 2
- Moderately important..... 3
- Very important..... 4

<u>Can be bought in shops close to where I live/ work</u>	
Not important at all.....	1
A little important.....	2
Moderately important.....	3
Very important.....	4
<SHEAD>	
<u>Is readily available at home</u>	
Not important at all.....	1
A little important.....	2
Moderately important.....	3
Very important.....	4
<u>Smells nice</u>	
Not important at all.....	1
A little important.....	2
Moderately important.....	3
Very important.....	4
<u>Looks nice</u>	
Not important at all.....	1
A little important.....	2
Moderately important.....	3
Very important.....	4
<u>Tastes good</u>	
Not important at all.....	1
A little important.....	2
Moderately important.....	3
Very important.....	4
<u>Has flavour</u>	
Not important at all.....	1
A little important.....	2
Moderately important.....	3
Very important.....	4
<u>Is not expensive</u>	
Not important at all.....	1
A little important.....	2
Moderately important.....	3
Very important.....	4
<u>Is good value for money</u>	
Not important at all.....	1
A little important.....	2
Moderately important.....	3
Very important.....	4

<u>Is familiar to me</u>	
Not important at all.....	1
A little important.....	2
Moderately important.....	3
Very important.....	4
<u>Is what I usually drink</u>	
Not important at all.....	1
A little important.....	2
Moderately important.....	3
Very important.....	4
<u>Is a new product</u>	
Not important at all.....	1
A little important.....	2
Moderately important.....	3
Very important.....	4
<u>Is the first time I've seen a product</u>	
Not important at all.....	1
A little important.....	2
Moderately important.....	3
Very important.....	4
<u>A product so new that I'd be one of the first to try</u>	
Not important at all.....	1
A little important.....	2
Moderately important.....	3
Very important.....	4
<u>It has a low sugar or zero sugar content</u>	
Not important at all.....	1
A little important.....	2
Moderately important.....	3
Very important.....	4
<u>Is an energy "pick-me-up" drink</u>	
Not important at all.....	1
A little important.....	2
Moderately important.....	3
Very important.....	4
<u>It re-hydrates my body quickly</u>	
Not important at all.....	1
A little important.....	2
Moderately important.....	3
Very important.....	4

Is a product that most of my friends drink

Not important at all.....	1
A little important.....	2
Moderately important.....	3
Very important.....	4

```

+-----+
| 16. Here are the drinks we showed you earlier $RG1
|
| $IM1          $IM2
| %400,/        $IM3//%402,/        $IM4//%404,/        $IM5
| //%406,/      $IM6
| //%408,/      $IM7//%410,/        $IM8//%412,/        $IM9 //
|
| $RG2 While you may not have tried all of these, we are interested in your
| general impressions. Would you say that these drinks are:
+-----+

```

Tap Water

```

More healthy than..... 1
As healthy as..... 2
Less healthy than..... 3
Can't Say..... 4

```

Bottled Still Water

```

More healthy than..... 1
As healthy as..... 2
Less healthy than..... 3
Can't Say..... 4

```

Soft Drinks

```

More healthy than..... 1
As healthy as..... 2
Less healthy than..... 3
Can't Say..... 4

```

Fruit Juice

```

More healthy than..... 1
As healthy as..... 2
Less healthy than..... 3
Can't Say..... 4

```

Milk

```

More healthy than..... 1
As healthy as..... 2
Less healthy than..... 3
Can't Say..... 4

```

zero sugar / diet soft drinks

```

More healthy than..... 1
As healthy as..... 2
Less healthy than..... 3
Can't Say..... 4

```

Tap Water

```

Contain more sugar than..... 1
Contain the same amount of sugar as..... 2
Contain less sugar than..... 3
Can't Say..... 4

```

Bottled Still Water

```

Contain more sugar than..... 1

```

Contain the same amount of sugar as.....	2
Contain less sugar than.....	3
Can't Say.....	4
<u>Soft Drinks</u>	
Contain more sugar than.....	1
Contain the same amount of sugar as.....	2
Contain less sugar than.....	3
Can't Say.....	4
<u>Fruit Juice</u>	
Contain more sugar than.....	1
Contain the same amount of sugar as.....	2
Contain less sugar than.....	3
Can't Say.....	4
<u>Milk</u>	
Contain more sugar than.....	1
Contain the same amount of sugar as.....	2
Contain less sugar than.....	3
Can't Say.....	4
<u>zero sugar / diet soft drinks</u>	
Contain more sugar than.....	1
Contain the same amount of sugar as.....	2
Contain less sugar than.....	3
Can't Say.....	4
<u>Tap Water</u>	
Contain more Vitamins & Minerals than.....	1
Contain the same amount of Vitamins & Minerals as.....	2
Contain less Vitamins & Mineralsthan.....	3
Can't Say.....	4
<u>Bottled Still Water</u>	
Contain more Vitamins & Minerals than.....	1
Contain the same amount of Vitamins & Minerals as.....	2
Contain less Vitamins & Mineralsthan.....	3
Can't Say.....	4
<u>Soft Drinks</u>	
Contain more Vitamins & Minerals than.....	1
Contain the same amount of Vitamins & Minerals as.....	2
Contain less Vitamins & Mineralsthan.....	3
Can't Say.....	4
<u>Fruit Juice</u>	
Contain more Vitamins & Minerals than.....	1
Contain the same amount of Vitamins & Minerals as.....	2

Contain less Vitamins & Mineralsthan.....	3
Can't Say.....	4

Milk

Contain more Vitamins & Minerals than.....	1
Contain the same amount of Vitamins & Minerals as.....	2
Contain less Vitamins & Mineralsthan.....	3
Can't Say.....	4

zero sugar / diet soft drinks

Contain more Vitamins & Minerals than.....	1
Contain the same amount of Vitamins & Minerals as.....	2
Contain less Vitamins & Mineralsthan.....	3
Can't Say.....	4

%58.

19. THIS QUESTION IS ABOUT YOUR USUAL CONSUMPTION OF VEGETABLES, INCLUDING FRESH, FROZEN AND TINNED VEGETABLES.

Thinking about a serve as half a cup of cooked vegetables or 1 cup of salad vegetables. How many serves of vegetables do you usually eat each day?

One serve or less.....	1
Two serves.....	2
Three serves.....	3
Four serves.....	4
Five serves.....	5
Six or more serves (\$IT1Click here and enter in box below\$IT2).....	97
Don't eat vegetables.....	98

20. THIS QUESTION IS ABOUT YOUR USUAL CONSUMPTION OF FRUIT, INCLUDING FRESH, FROZEN AND TINNED FRUIT.

Thinking about a serve as 1 medium piece or 2 small pieces of fruit or 1 cup of diced pieces. How many serves of fruit do you usually eat each day?

One serve or less.....	1
Two serves.....	2
Three serves.....	3
Four serves.....	4
Five serves.....	5
Six or more serves (\$IT1Click here and enter in box below\$IT2).....	97
Don't eat fruit.....	98

21. In the last two weeks, how many times have you walked for sport, recreation or fitness or to get to or from places for at least 10 minutes continuously?

|__|__+

WARNING4

ArialRED Please check your response. You mentioned earlier that there were %172. occasions when you walked for at least 10 minutes continuously. Please review the page and answer questions..... 1,

If walked at least once, ASK:

+-----+
| %173. |
+-----+

<SHEAD>

22. IN TOTAL, how long would you estimate that you spent walking in the last two weeks on %446,/ this/ these/ %172. occasions?

PLEASE ENTER THE NUMBER OF HOURS IN THE FIRST BOX AND THE NUMBER OF MINUTES IN THE SECOND BOX BELOW

|__|__+

|__|__+

+-----+
| hours minutes |
+-----+

23. Thinking about moderate exercise excluding walking. By moderate exercise, we mean any exercise which caused a moderate increase in your heart rate or breathing. In the last two weeks, did you do any moderate exercise?

- Yes..... 1
No..... 2
Can't say..... 3

if participate in moderate exercise, ask:

24. In the last two weeks, how many times have you done any moderate exercise?

|__|__+

If done moderate exercise, ASK:

+-----+
| %55. |
+-----+

25. IN TOTAL, how long would you estimate that you spent doing moderate exercise in the last two weeks on %454,/this/these/ %176. occasions?

PLEASE ENTER THE NUMBER OF HOURS IN THE FIRST BOX AND THE NUMBER OF MINUTES IN THE SECOND BOX BELOW

|__|__+

|__|__+

+-----+
| hours minutes |
+-----+

26. Thinking about vigorous exercise. By vigorous exercise, we mean any exercise which caused a large increase in your heart rate or breathing. In the last two weeks, did you do any vigorous exercise?

- Yes..... 1
No..... 2
Can't say..... 3

if participate in vigorous exercise, ask:

27. In the last two weeks, how many times have you done any vigorous exercise?

|__|__+

If done vigorous exercise, ASK:

+-----+
| %55. |
+-----+

<SHEAD>

28. IN TOTAL, how long would you estimate that you spent doing vigorous exercise in the last two weeks on %462,/this/these/ %179. occasions ?

PLEASE ENTER THE NUMBER OF HOURS IN THE FIRST BOX AND THE NUMBER OF MINUTES IN THE SECOND BOX BELOW

|__|__+

|__|__+

+-----+
| hours | minutes |
+-----+

29. Below are statements about buying food. Which of these best describes how you choose when buying food for your household?

- I never deliberately choose the healthy or nutritious alternative..... 1
- I seldom deliberately choose the healthy or nutritious alternative..... 2
- I sometimes choose the healthy or nutritious alternative... 3
- I mostly deliberately choose the healthy or nutritious alternative..... 4
- I always deliberately choose the healthy or nutritious alternative..... 5
- I never purchase food for my household..... 6

30. Do you read the labels on bottles of drinks to check the ingredients/contents?

- Yes, always..... 1
- Yes, often..... 2
- Yes, sometimes..... 3
- Yes, the first time I buy a new product..... 4
- No..... 5
- Don't know..... 6

31. Please indicate if you are male or female

- Male..... 1
- Female..... 2

<SHEAD>

**32. Please indicate your household's TOTAL approximate annual income from all sources, before tax?
IF YOU ARE NOT CERTAIN, PLEASE GIVE YOUR BEST ESTIMATE (WEEKLY EQUIVALENTS IN BRACKETS).**

Nil income.....	1
\$1 - \$10,000 per year (\$1-\$192 per week).....	2
\$10,001 - \$25,000 per year (\$193-\$480 per week).....	3
\$25,001 - \$40,000 per year (\$481-\$769 per week).....	4
\$40,001 - \$55,000 per year (\$770-\$1057 per week).....	5
\$55,001 - \$70,000 per year (\$1058-\$1346 per week).....	6
\$70,001 - \$85,000 per year (\$1347-\$1634 per week).....	7
\$85,001 - \$100,000 per year (\$1635-\$1923 per week).....	8
\$100,001 or more per year (\$1924 or more per week).....	9
Prefer not to answer.....	10

33. What is the highest level of education you've reached?

Primary school.....	1
Secondary school up to year 10 (previously also called 4th form).....	2
Secondary school up to year 11 or 12 (previously also called 5th form or 6th form).....	3
Trade qualifications.....	4
Certificate (non-trade) and Diplomas.....	5
Bachelor Degree.....	6
Higher Qualifications/Postgraduate Degree.....	7
Other.....	8

-----+
| END-OF-QUESTIONNAIRE |
-----+