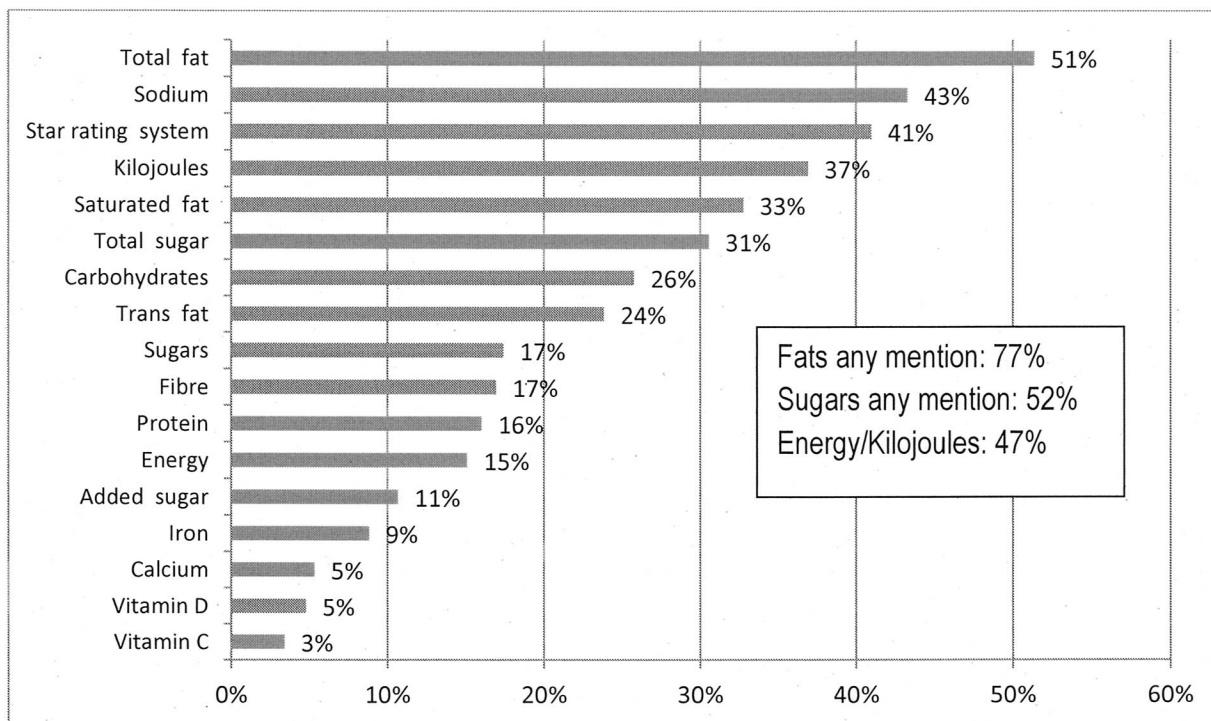
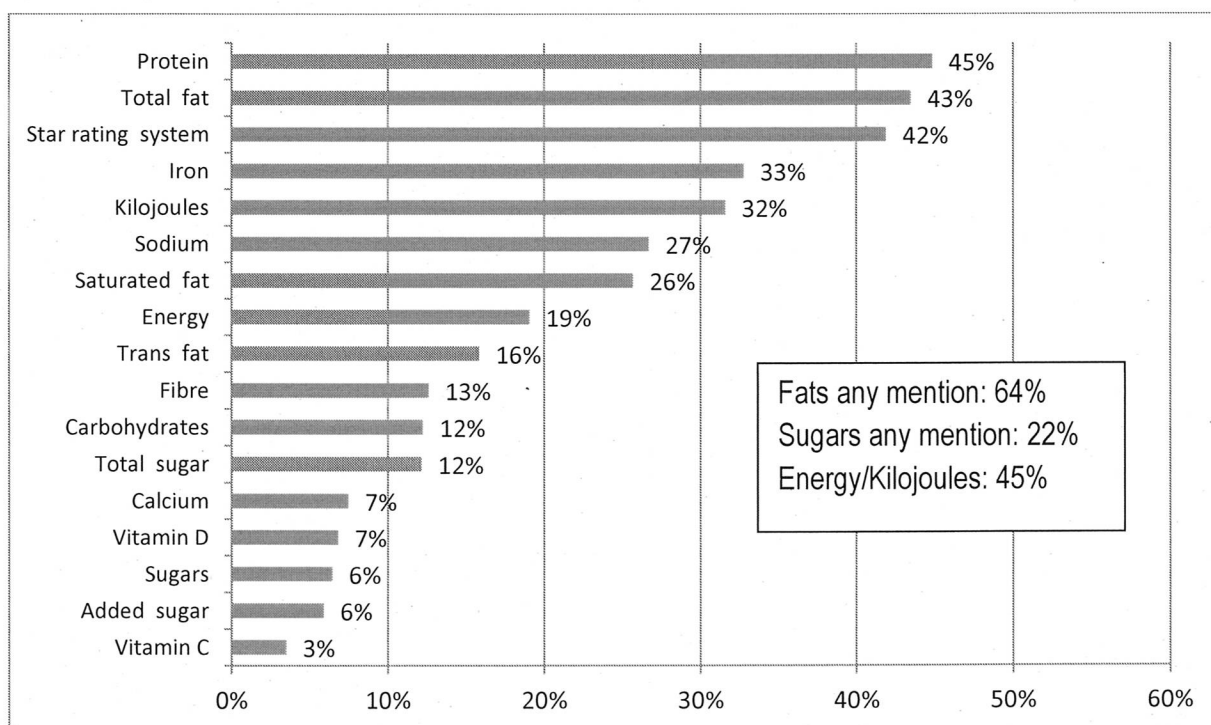


Chart 24. Nutrients to Include for Pre-Prepared/Convenience Meals



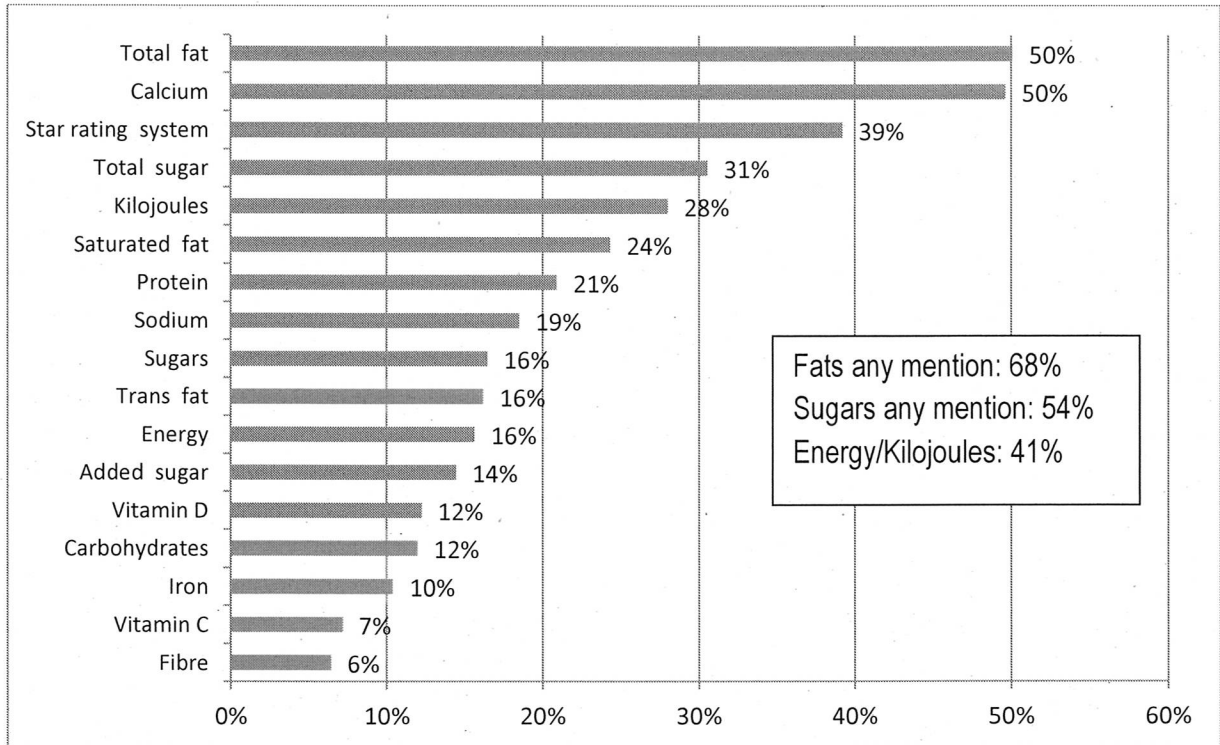
M2b In the grid below, please select the most important nutritional information that you would like to see for each type of food shown. You can select a maximum of five nutrients for each food type.

Chart 25. Nutrients to Include for Meats, Chicken and Fish



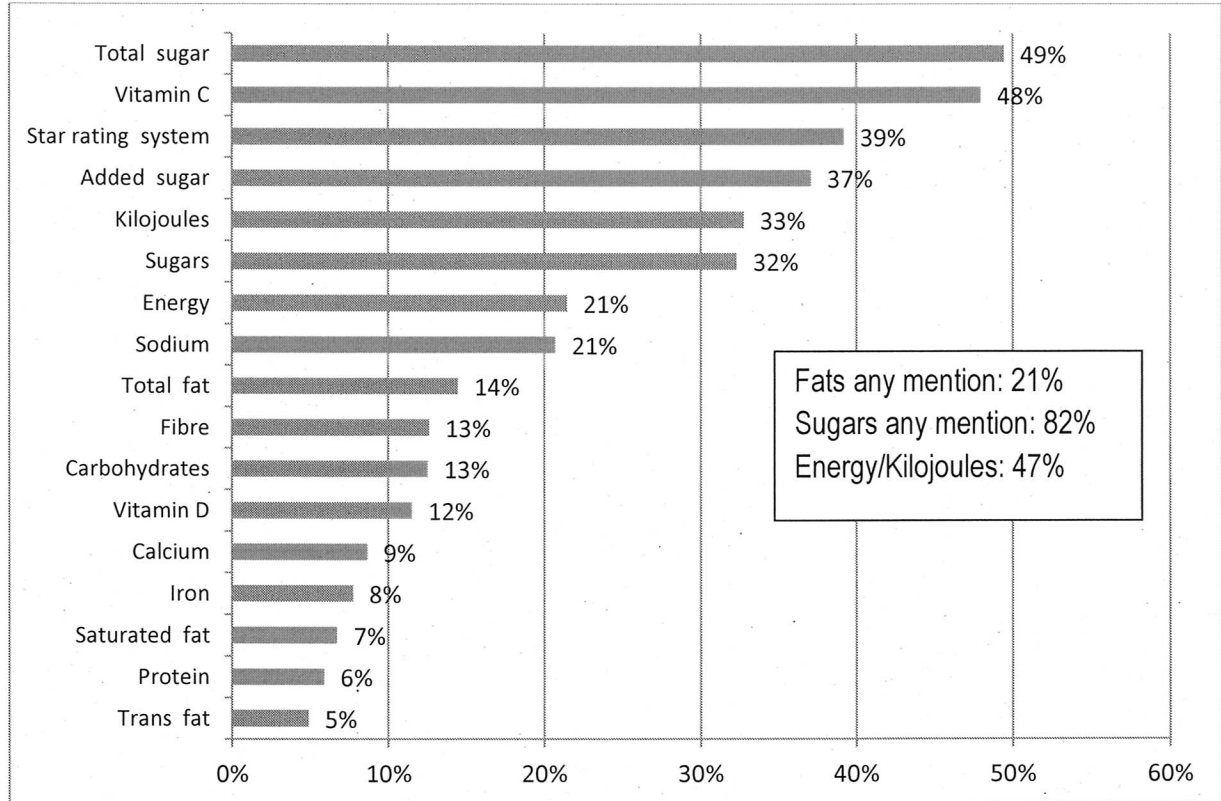
M2b In the grid below, please select the most important nutritional information that you would like to see for each type of food shown. You can select a maximum of five nutrients for each food type.

Chart 26. Nutrients to Include for Dairy Products



M2b In the grid below, please select the most important nutritional information that you would like to see for each type of food shown. You can select a maximum of five nutrients for each food type.

Chart 27. Nutrients to Include for Juices and Drinks



M2b In the grid below, please select the most important nutritional information that you would like to see for each type of food shown. You can select a maximum of five nutrients for each food type.

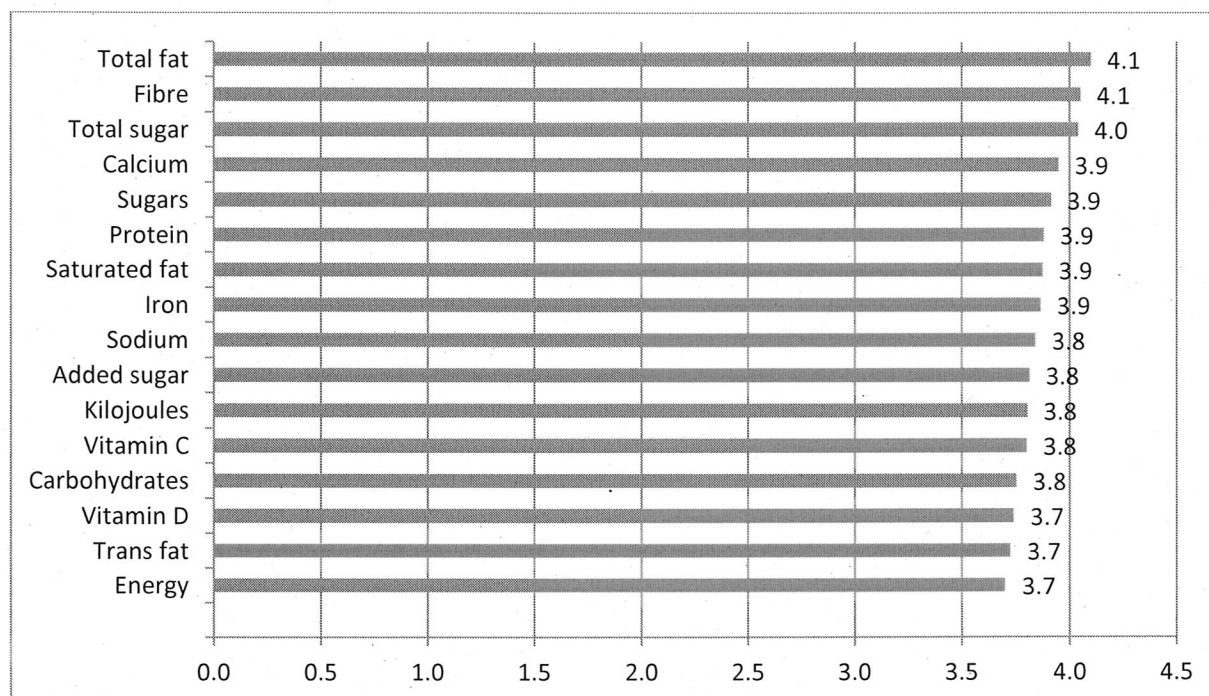
One of the key findings from this exercise involved the extent to which the (perceived) most important elements differed by food type. Although some of the elements are consistently important, there are marked differences for others. The key consistencies and differences in the results are summarised as follows:

- The Star Rating System was consistently placed in the top three for all five of the categories of food types
- Kilojoules is consistently in the upper range of importance across all foods
- Certain positive nutrients appear at the top of the lists for different food groups – Protein and Iron for meats, chicken & fish; Calcium for dairy, and vitamin C for juices & drinks
- Sodium is relatively high on the list, except in dairy and juices & drinks
- Total Fat is placed amongst the highest within all categories, except juices & drinks (where it is presumably considered to be less relevant, given the low fat content of this category)
- The importance of Total Sugar differs considerably – while it is close to the top of the list for breakfast cereals etc. and juices and drinks, it has “middle-range” importance within pre-prepared/convenience meals, and very low importance in meats chicken and fish

As a separate exercise, respondents rated the importance of several nutritional components on *overall health*. This exercise was designed to distinguish between consumers' preferences for nutrients they would like to see on a FoPL label and their understanding of what nutrients are actually important for their overall health. Whereas preferences can be influenced by specific goals (e.g. weight loss, weight

gain, vitamin supplementation etc.), ratings of nutrients based on their overall importance to health were expected to be somewhat different. Indeed, Chart 28 shows that when respondents rate nutrients based on perceptions of their importance to overall health, the top-five components are a combination of positive and negative nutrients which looks slightly different to previous combinations.

Chart 28. Nutritional Importance on Overall Health



M3. In this question, we'd like to understand how important you think is each of the nutritional components listed below to an individual's health. Using the scale provided, please rate the **importance of each nutritional component on overall health**. (1=completely unimportant, 5 = extremely important).

While Total Fat and Total Sugar have appeared in previous lists shown in this report, Fibre, Calcium and Protein feature in the top group of nutrients.

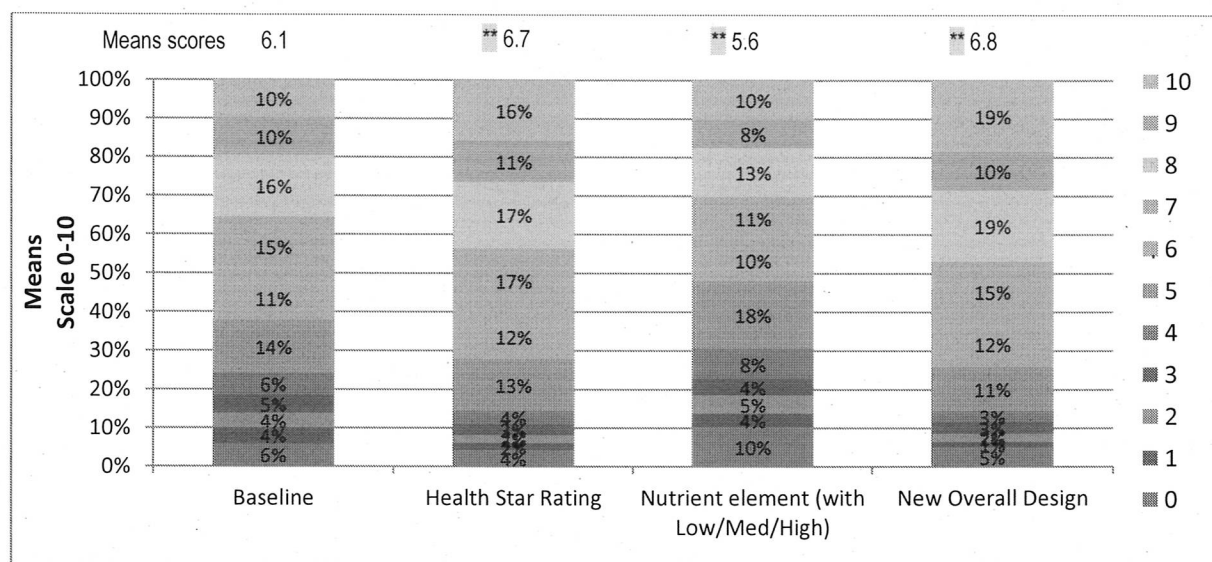
3.6 EVALUATING COMPLETE FOPL LABELS

3.6.1 Potential influence of a complete FoPL label on food purchase choices

The qualitative phase of the study design recommended a potential overall design of the FoPL, which was fed into the last section of the survey. The objective of this section was to determine consumer reaction to a complete FoPL design, potential impacts of the design on purchase choices, and how the design could be further fine-tuned.

Respondents were asked to rate the potential influence of the overall FoPL design on their food choices. The results are shown in Chart 29, and compared with similar ratings for the star element alone (“Health Star Rating”) and the nutrient element alone (specifically, the best performing variant of the nutrient element, which included the “Low/Medium/High” component).

Chart 29. Influence of the Overall Design on Food Purchase Choice



C2. To what extent does the current nutritional information on food packaging influence your food purchase choices? (0=It has no influence, 10=It has a very strong influence).

O1. The label above is an example of a complete label containing a star rating system and nutritional information. If this label were present on food packs, to what extent would this label influence your food purchase choices? (0=It has no influence, 10=It has a very strong influence)

As can be seen in Chart 29, mean ratings for the new Overall Design are significantly higher than the baseline measure, suggesting that consumers feel that the proposed FoPL design will have a significant impact on their food purchase choices. It is also worth noting that the star rating element is significantly higher than the nutrient element when it comes to consumers' self-ratings of influence on food purchase choice – this suggests that the star ratings are having a greater impact than the nutrient elements when it comes to influencing consumer behaviour. That said, the mean rating of the Overall FoPL label (i.e. combining both elements) is higher than either the star rating or the nutrient element, suggesting that combining the elements results in the highest overall impact on consumers.

Although it is difficult to translate the mean score results in Chart 29 directly to actual volumes of consumers, we can gain some understanding of the impact of the new FoPL label by looking at changes in numbers of respondents within “top boxes” in the rating scale. If we assume that a score of 8-10 equates to a “strong” influence, then 36% of consumers interviewed would be classified as being “strongly influenced” by existing nutritional information on food packs (this is based on the “Baseline” column in Chart 29). Compare this with 48% of consumers who rated 8-10 for the new FoPL label – this is a growth of 33% in the number of consumers who would be strongly influenced by the new FoPL label.

Respondents were then asked to rate their level of understanding of the Overall FoPL label. The results are shown in Table 3, below.

Table 3. Understanding and Influence of overall proposed FoPL design (by demographic)

Characteristic	Understanding (Mean rating)	Influence (Mean rating)
Total Sample	6.9	6.8
Gender		
Male	6.5*	6.5**
Female	7.1	7.1**
Age		
18-24 years	7.0	7.0
25-29 years	6.9	6.9
30-34 years	6.7	6.5
35-44 years	7.0	6.8
45-54 years	6.9	7.0
55-64 years	6.7	6.9
65-75 years	6.7	6.8
75+ years	7.0	6.6
State/Territory of residence		
NSW	6.6**	6.5**
Victoria	6.8	7.0
Queensland	7.2	7.0
Western Australia	7.2	7.2
South Australia	7.1	6.9
Tasmania	6.3	5.9**
ACT	7.4	6.3**
Northern Territory	7.4	8.1
Area of residence		
Capital city	6.9	6.9
Regional centre	7.0	6.9
Country town	6.6	6.6
Rural or remote locality	6.9	6.8
Highest level educational attainment		
Year 9 or below	6.4	6.6
Year 10 or 11	6.8	6.7
Year 12 or high school equivalent	6.9	7.0
TAFE certificate or diploma	6.9	6.8
Bachelors degree	6.9	6.9
Postgraduate qualification	7.0	7.1
Don't know/prefer not to say	5.2**	4.8**
Current situation		
Working full-time	6.7	6.8
Working part-time	7.1	7.2**
Home duties	7.0	7.1
Retired	6.6**	6.7
Student	6.8	6.5
Not in the workforce	7.0	6.6
Other	7.6	6.5

Characteristic	Understanding (Mean rating)	Influence (Mean rating)
Total Sample	6.9	6.8
Household Description		
Young single or couple (no children)	6.8	6.7
Young family (oldest child under 6 years)	6.9	7.0
Middle family (oldest child 6-15 years)	7.2	7.0
Mature family (oldest child over 15 years)	6.7	6.8
Mature single or couple	6.9	6.9
Other (Please Specify)	6.9	6.6
Don't know/prefer not to say	6.2	6.2
Origin Aboriginal or Torres Strait Islander		
Yes	6.0	6.3
No	6.9	6.9
Don't know/prefer not to say	5.6**	6.0
Language Other Than English At Home		
Yes	7.1	7.3**
No	6.8	6.8
Don't know/prefer not to say	7.0	6.3
Annual Personal Income		
Up to \$20,000	7.0	6.8
\$20,001 to \$35,000	6.8	6.9
\$35,001 to \$50,000	7.0	7.3**
\$50,001 to \$75,000	7.0	6.9
\$75,001 to \$100,000	7.0	6.7
\$100,001 to \$150,000	6.1*	6.6
\$150,001 to \$200,000	5.8*	7.2
More than \$200,000	8.4	8.6
Don't know/prefer not to say	6.5**	6.6
Annual Household Income		
Up to \$20,000	7.0	6.5
\$20,001 to \$35,000	6.8	6.7
\$35,001 to \$50,000	6.9	7.1
\$50,001 to \$75,000	6.9	6.9
\$75,001 to \$100,000	6.9	6.9
\$100,001 to \$150,000	7.1	7.1
\$150,001 to \$200,000	7.1	7.5
More than \$200,000	6.5	6.6
Don't know/ prefer not to say	6.6	6.6

Key demographic questions: S1-S3, D1-D12.

**Significant at 95%

* Significant at 99%

The table shows that the main significant difference in terms of understanding of the label and its perceived potential influence on food purchase behaviour is between males and females, where females had significantly higher means ratings for understanding and influence than males. Our hypothesis as to the drivers of this difference are that females tend to be the more likely main grocery buyers and shoppers, meaning that they are more likely to come in contact with nutritional information on food packs, including existing nutritional labels (such as the Daily Intake Guide).

The other noteworthy differences are amongst:

1. Retirees – where this group reports slightly lower ratings than average for understanding.
2. NSW respondents, who rated significantly lower than average on both understanding and influence measures

3.6.2 What would consumers change about the proposed FoPL label?

Consumers were given the chance to comment on any changes they would make to the label. Only a third of participants claimed there was something they would change about the design.

The results are shown in the table below.

Table 4. Comments From Participants Who Would Change Something About the Design

Understanding of Low/Medium/High	Frequency %
DI%/DI instead of/as well as high, medium, low - DI more accurate/easier to calculate	27%
Get rid of 2.5 rating - unnecessary/can see there are 2.5 stars	7%
Nothing/fine as it is	7%
Explain what high, medium, low means/don't understand high, medium, low	6%
More colourful/add some colour	4%
Change per 100g to per serve/show rating on per serve basis	4%
Simplify/too much information/have less information/too much writing	4%
Get rid of low, medium, high/don't like low, medium, high/change low, medium, high/low, medium	3%
Colour code low, medium and high	3%
Include calories/give calorie equivalent of kilojoules	3%
Include list of additives/preservatives/colours/flavours	3%
Get rid of stars/get rid of star rating	3%
Include protein	3%
Include total fat	3%
Include carbohydrates	2%
Include trans fats	2%
Don't know/no answer	2%
Change high, medium, low to percentage	2%
Explain star rating/how is Health Star Rating calculated	2%
Include vitamin/mineral/calcium/iron content	2%
Show serving size/indicate serving size/amount per serve	1%
Explain kilojoule rating/kilojoule rating meaningless/do not rate kilojoules just include figure	1%
Who devised rating/which Government body/some form of accreditation	1%
Include energy/energy instead of kilojoules	1%
Get rid of it altogether/don't have it at all	1%
Get rid of Health Star Rating	1%
Include GI rating	1%
Include gluten content	1%

Understanding of Low/Medium/High	Frequency %
Make it clearer/easier to understand	1%
Indicate whether level is healthy or not/which ratings are healthy/highlight unhealthy ratings	1%
Include daily intake information/daily intake of each ingredient	1%
Explain what person rating is based on - male/female/age etc	1%
Include Heart Foundation tick	1%
Smaller star rating/star rating less prominent	1%
Just have star rating	1%
Include full list of ingredients/more ingredients	1%
Other answers	12%

Q4. Is there anything that you would change in the label to make it more useful in helping you make food purchase choices?
 Sample size n = 360

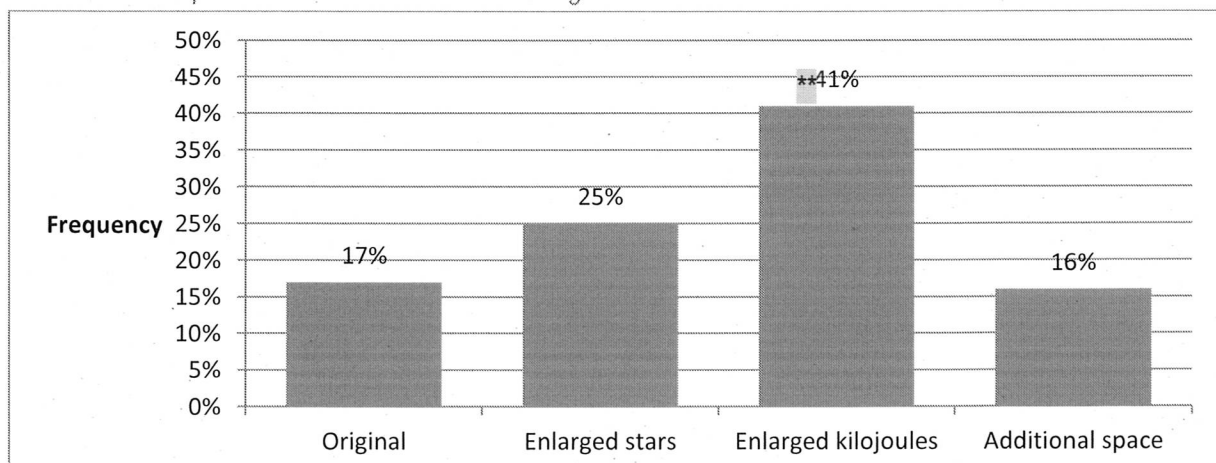
The most frequent suggestion for improving the FoPL label was to replace the “Low/Medium/High” component with DI (or to have both), with around 27% of those who provided a suggested improvement (representing around 9% of the total sample) making this suggestion.

Note from earlier findings presented in the report that there was “large minority” of respondents who preferred DI over “Low/Medium/High”, and given that at this point in the survey, the FoPL contained only “Low/Medium/High”, it should not be surprising that a number of respondents noted their preference for DI. Apart from this, there was a “long tail” of suggestions, with some of the more noteworthy suggestions including:

- Colour coding Low/Medium/High
- Include accreditation (who devised/regulates the label)
- Just have the star rating

Respondents were then shown four different versions of the complete FoPL label and asked to rate how useful each variant would be to them, with the four variants emphasising different components of the label.

Chart 30. Participant Preference for Overall Design



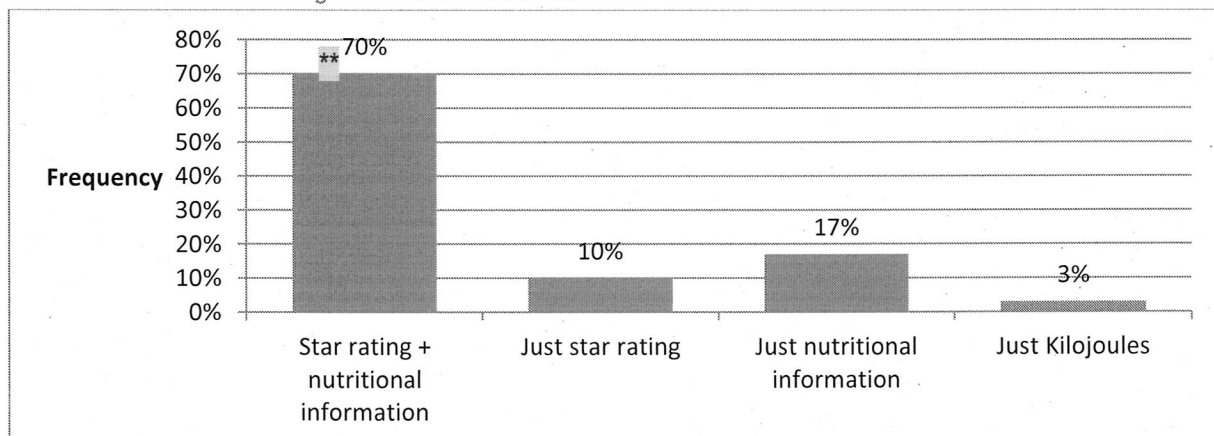
Q5. Below you can see four different versions of the label. Which version would you find most useful?

Although all variants were chosen to some extent, the “Enlarged kilojoules” variant had significantly more responses than the next highest. Although respondents were not asked explicitly in the survey to explain their choices, it is likely that this variant was chosen given the overall importance of kilojoules relative to other nutrients (and the fact that the star ratings element is already quite prominent).

Respondents were then shown four different label variants – a complete label, just the star rating element, just the nutrient element, and just the kilojoule component, (note that in the survey, the kilojoule component was shown as the same size as in the nutritional element component for consistency).

Respondents were asked to select the one variant that they felt best reflected “the right amount of information for your needs”. The rationale for this question was to understand whether a complete FoPL label represented more information than consumers needed, and if a single element/component of the complete label might be seen as a more appropriate amount of information. The results are shown in Chart 31, below.

Chart 31. Label with the Right Amount of Information



Q6. If you could pick only one of the above labels to be put on the front of all packaged foods, which do you think represents the right amount of information for your needs?

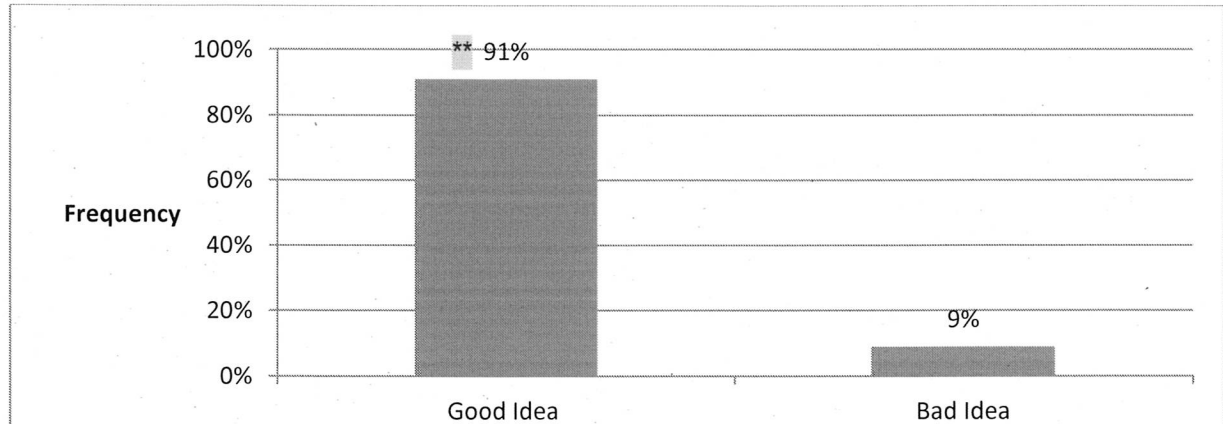
A large majority of consumers (70%) felt that the complete FoPL label represented the right amount of information for their needs, suggesting a desire to have all elements on front-of-pack, rather than specific elements/components only.

3.7 PERCEIVED VALUE OF THE PROPOSED FOPL

3.7.1 Overall attitudes towards a FoPL concept

At the end of the survey, having experienced some of the proposed FoPL designs (as well as an existing alternative in the Daily Intake Guide), respondents were asked whether they felt that a “nutritional labelling system, such as the ones you have seen in this survey” are a good or bad idea. As shown in Chart 32 below, overwhelmingly, respondents felt that a FoPL system was a good idea.

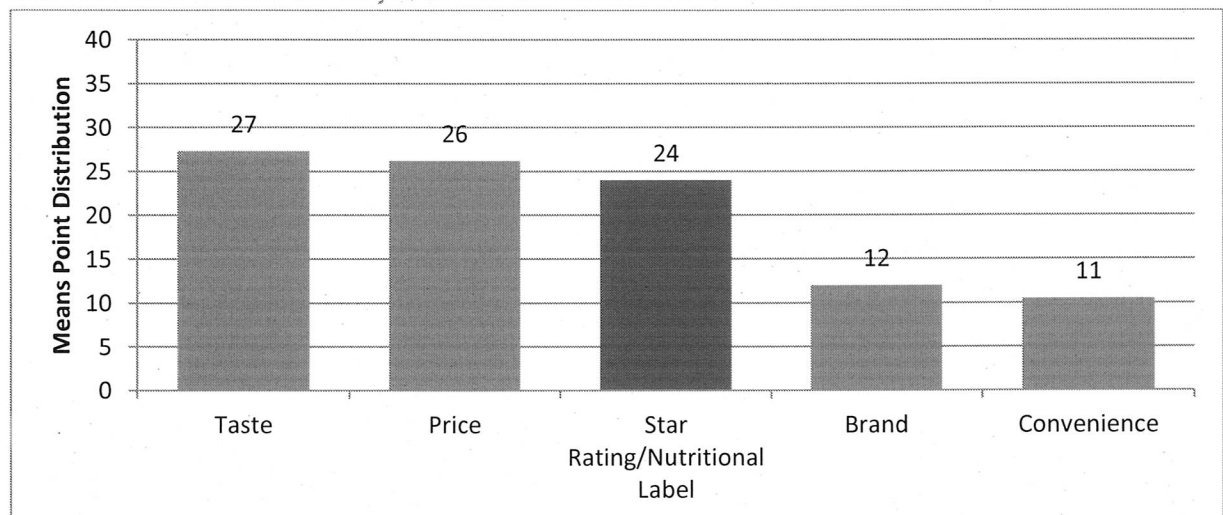
Chart 32. Attitude Towards a Nutritional Rating Label



D1. Which of the following statements best describes your attitudes towards having a nutritional labelling system, such as the ones you've seen in this survey, on the front of all packaged foods?

Respondents were also asked to estimate the relative importance of a FoPL system, compared to four other purchase decision factors when buying food: taste, price, brand and convenience. The estimate was to be provided as part of a points allocation task, in which respondents had 100 points that had to be allocated across the five purchase decision factors (in which the fifth factor is a hypothetical FoPL). The more points allocated to a particular factor, the more important is that factor, and vice versa. The results can be seen in Chart 33, below.

Chart 33. Other Factors that May Influence Consumer Choice



O8. Below is a list of different factors that may influence the choice of foods that you purchase. Please distribute 100 points across the different factors according to how important or unimportant is each factor in your food purchase choices.

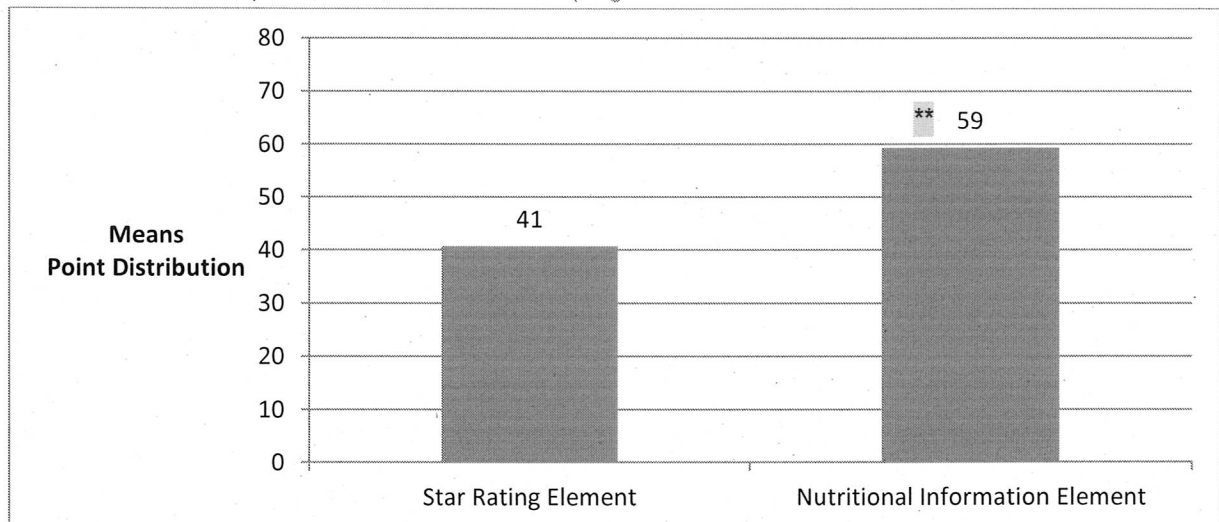
As can be seen in Chart 33, of the 100 points that represent the purchase decision, on average, taste and price received the most points (and thus, the most "importance" in the purchase decision). However, the FoPL system received a very similar number of points, and considerably more than either the food brand or convenience. Although it is difficult to ascertain the exact relative value of a concept with a direct question such as this, the results suggest that consumers consciously attribute considerable value to a FoPL concept.

The label's value was further explored by examining the relative values of the two key elements within the label, the star rating element and the nutrient element. This was done using the same points

allocation format, where respondents were asked to allocate 100 points across the two elements, according to “how useful each element would be in helping you make food purchase choices”.

The results can be seen in Chart 34 below. Interestingly, the nutrient element received a significantly higher number of points than the star rating element. However, note that the nutrient element contains considerably more “bits” of information than the star rating element, which essentially conveys one piece of information. Considered in this way, the star element would “over-index” on importance compared to any other piece of information in the proposed FoPL label.

Chart 34. Relative Importance of Elements in Helping Make a Food Purchase Choice

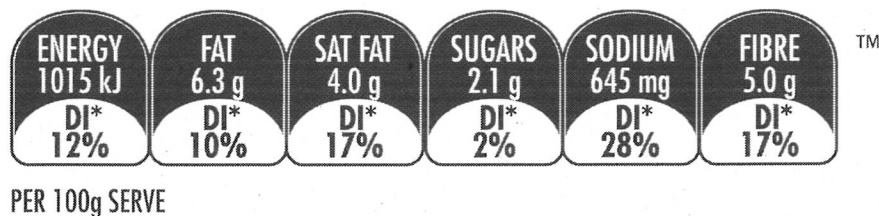


O7. Please distribute 100 points across the two elements according to how useful each element would be in helping you make food purchase choices. The more useful the element, the more points you should allocate to it.

3.7.2 Comparing the proposed FoPL system to the Daily Intake Guide (DIG)

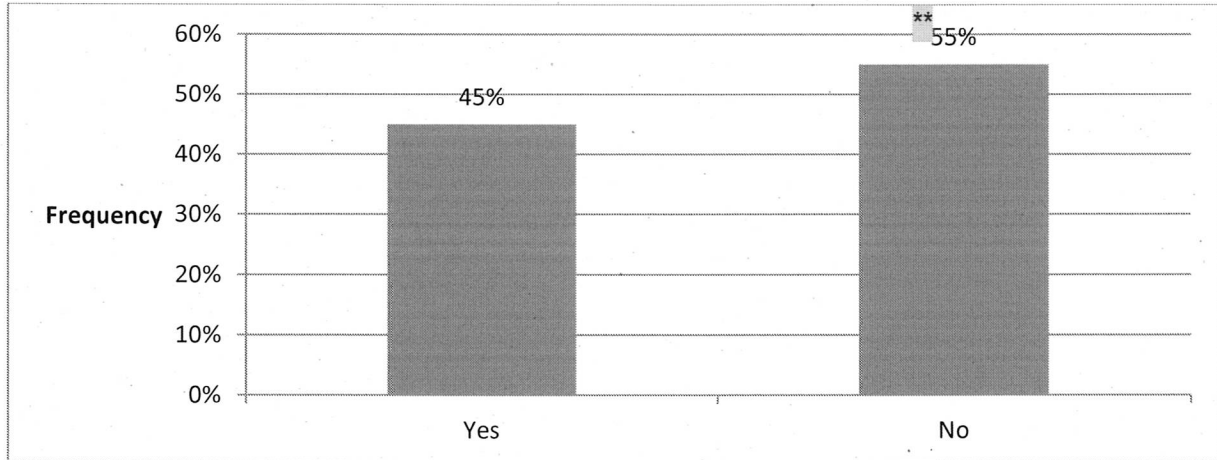
One of the ways in which the value of the proposed FoPL system could be determined is by comparison to existing systems. To this end, the proposed FoPL was compared to the existing Daily Intake Guide (DIG) in its perceived usefulness, level of understanding, and overall influence on food purchase choices. An example of the DIG label is shown below (this image was also used in the survey).

Current DIG Design



Respondents were first shown the DIG label and asked whether they had seen it previously. As reported early (and in Chart 35 below), just under half the sample (45%) claim to remember seeing it in the past.

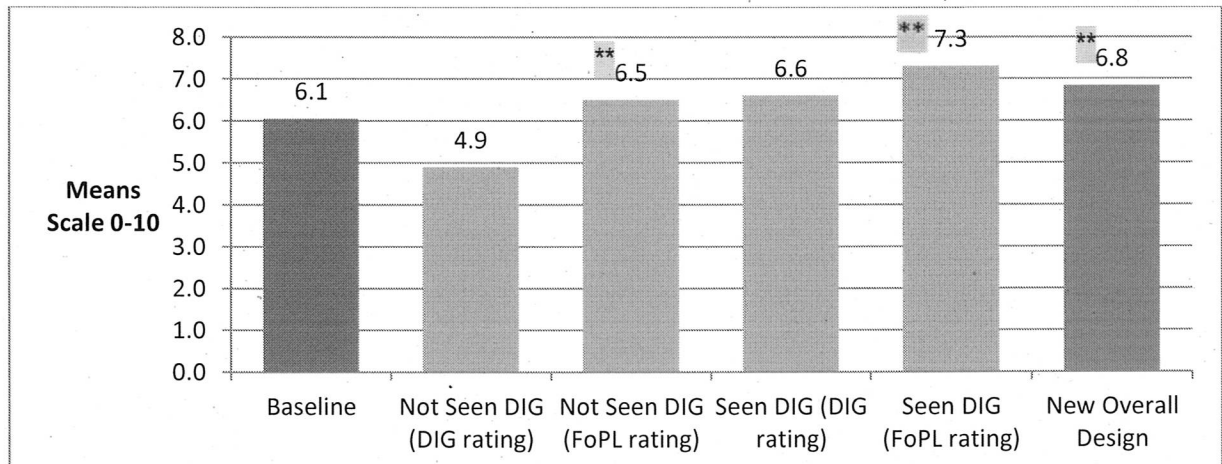
Chart 35. Whether Participants Had Previously Seen the DIG Label



Q9. Do you remember seeing this type of label on any foods you've bought in the past?

Respondents were then asked to rate the DIG guide based on the extent to which they felt it would influence their food purchase decision. The results are shown in Chart 36, below.

Chart 36. Influence of Baseline, Current DIG Label and New Overall Labels Compared



C2. To what extent does the current nutritional information on food packaging influence your food purchase choices? (0=It has no influence, 10=It has a very strong influence)

O10. This is an existing label that is present on some types of food. To what extent DOES/WOULD this label influence your food purchase choices? (0=It has no influence, 10=It has a very strong influence)

O1. The label above is an example of a complete label containing a star rating system and nutritional information. If this label were present on food packs, to what extent would this label influence your food purchase choices? (0=It has no influence, 10=It has a very strong influence)

** New overall design significantly higher than baseline measure

** Those who have not seen the current DIG labels are significantly higher for both the DIG label and the FoPL design.

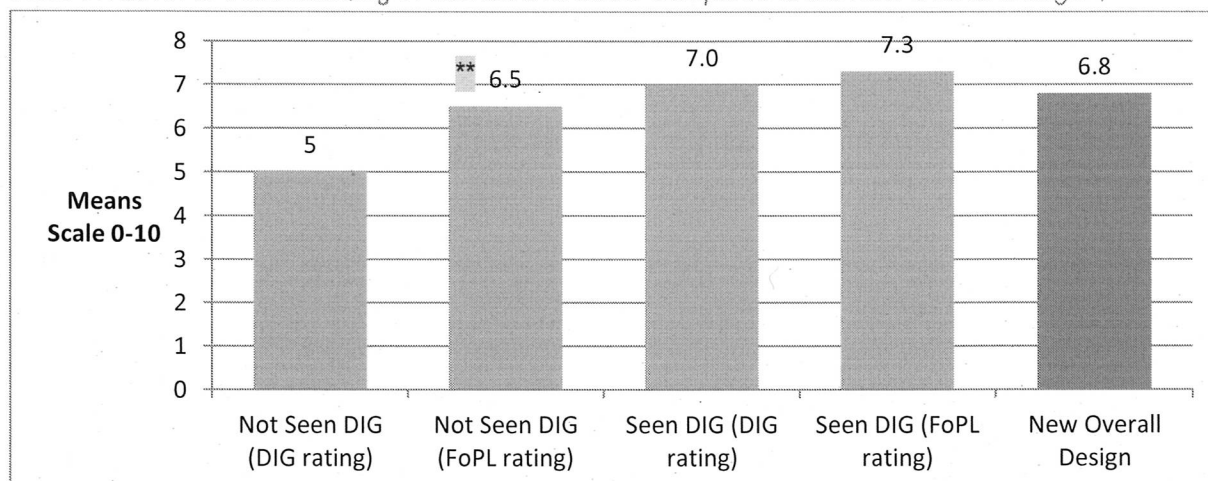
As can be seen in Chart 36, mean ratings for the new overall design were significantly higher than baseline (i.e. current information available on food packs). Additionally, mean ratings of the influence of the FoPL label were significantly higher than ratings for the DIG label, even amongst those who recognised the DIG label (and were therefore more likely to have used it in the past).

The extent to which respondents understand the DIG and proposed FoPL labels was also explored. As can be seen in Chart 37, understanding of the FoPL system was significantly better than the DIG amongst those who had previously not seen the DIG label, and was the same amongst those who had previously seen the DIG label (which is a positive result for FoPL, given that it contains more

information and components than the current DIG label and therefore more potential for misunderstanding).

These results are shown in Chart 37, below.

Chart 37. Level of Understanding of Current DIG Label Compared to the New Overall Design



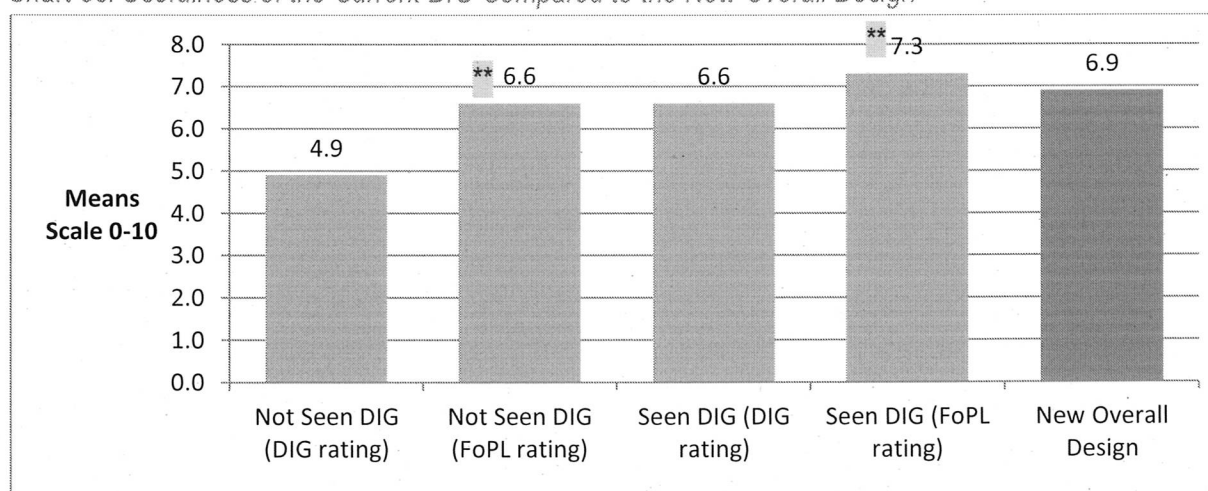
O2. And to what extent do you feel that you understand everything the label is communicating. (0 = I don't understand at all, 10 = I understand completely)

O11. And to what extent do you feel that you understand everything the label is communicating. (0 = I don't understand at all, 10 = I understand completely)

** Those who have seen the current DIG label had significantly higher levels of understanding for the DIG label and FoPL design than those who had not.

Finally, consumers rated both labels in terms of their overall usefulness "in helping you make food purchase choices", with results shown in Chart 38, below. In line with other comparisons, FoPL was rated significantly more useful than DIG amongst both those who had seen DIG previously and those who had not. In other words, even amongst those who recognised the DIG label (and hence some of whom are likely to have used it previously and formed positive associations with it), the proposed FoPL label was still considered to be significantly more useful.

Chart 38. Usefulness of the Current DIG Compared to the New Overall Design



O3. And overall, how useful IS/WOULD YOU FIND such a label in helping you make food purchase choices? (0 = Not useful at all, 10 = extremely useful)

O12. And overall, how useful IS/WOULD YOU FIND such a label in helping you make food purchase choices? (0 = Not useful at all, 10 = extremely useful)

** Those who have seen the current DIG label claimed significantly higher levels of usefulness for both the DIG label and the new FoPL label than those who had not.

A potential explanation for the more positive ratings of the FoPL label compared to DIG is due to a 'primacy effect' – i.e. the fact that respondents had seen it first within the questionnaire, before they were exposed to the DIG label, and therefore were influenced by this when providing ratings. However, recall that almost half (45%) of the sample recalled seeing the DIG label before doing the survey, suggesting that for this group, the primacy effect is more likely to be associated with the DIG label, rather than FoPL, and thus would have resulted in more favourable ratings for DIG. On the contrary, Charts 36 and 38 show that amongst those who had recalled seeing DIG previously, ratings were in fact more favourable towards FoPL. This pattern of results suggests that a primacy effect is not responsible for the more favourable ratings of the FoPL label.

3. CONCLUSIONS AND RECOMMENDATIONS FOR OPTIMAL FOPL DESIGN

Overall design recommendations from the qualitative research that are supported here:

- A box to enclose all elements of design
- The grey backed design option tested (Tank design)
- Be presented as a stacked display with star rating element sitting above nutrient elements
- Use of the 'Health Star Rating' name
- Incorporate the slider in the star design element
- Express all values as per 100 grams
- Include the term "kilojoules" rather than "energy"

Additional design recommendations assuming a label with "fixed" negative nutrients (i.e. the same nutrients across all food groups):

- Use "Low/Medium/High" rather than "DI %": consumers find the former easier to understand and quicker to read
- Consider including six nutrients in the label (including Kilojoules): Although respondents rated "5 nutrients" as the optimum number, there is evidence that six nutrients may be optimal in order to include all of the key information that consumers want to see (in particular, an emerging need to include both "Total Fats" and "Saturated Fats", as discussed below). Note also that the current DIG label often includes both Total Fats and Saturated Fats. If FoPL will replace DIG, inclusion of six nutrients may ensure that there is no perceived detriment in the amount and usefulness of information on the front-of-pack
- Include "Total Sugar", rather than "Sugars": Although these terms are intended to have the same meaning, the former is more easily understood by consumers and was consistently attributed more value.
- Include "Total Fat" and "Saturated Fat": both of these nutrients were considered amongst the most important to include (indeed, "Total Fat" was consistently seen as more important than "Saturated Fat").
- Include "Sodium": At an overall level (i.e. when discussing a label without reference to specific food group), Sodium was not considered one of the more important nutrients (in fact, it was 9th out of 14 nutrients in the list in importance). However, Sodium was considered important when referring to certain food groups (e.g. pre-prepared/convenience meals). Overall, there was a surprising lack of importance attributed to Sodium. A potential reason for this is that a portion of consumers may not be making the connection between "Sodium" and "salt", the latter of which has more negative health connotations (note that this is a hypothesis only and would need to be supported by further research).
- Include one positive nutrient, adapted by food group: Positive nutrients were important to consumers, but our results suggest that consumer needs for positive nutrient information differed

markedly across food types. While fibre was “overall” (i.e. without reference to a food group) the most important positive nutrient, the picture changed when talking about meats/chicken/fish (where protein was by far the most important), Dairy (calcium), and juices & drinks (Vitamin C). Interestingly, no positive nutrients were considered important when referring to pre-prepared/convenience meals. Further research may be needed to go into all food groups in detail to determine which positive nutrients are most important for each food type (from a consumer perspective).