

## Executive Summary

Food Standards Australia New Zealand (FSANZ) is an independent, trans-Tasman, government-funded organisation that has the role, in collaboration with other organisations, to protect the health and safety of the people in Australia and New Zealand through the maintenance of a safe food supply. In 2006, FSANZ commissioned TNS Social Research (TNSSR) to conduct a baseline survey to establish the current views of Australian and New Zealand consumers with regard to overall confidence in the food supply. This overall confidence was assessed in terms of behaviour, attitudes and confidence in eating at home, eating out, labelling of food products and the organisations playing a role in the regulation and monitoring of the food supply. This research is the first in a planned ongoing tracking program of consumer attitudes, behaviours and confidence. Future studies will allow for the tracking of change in these aspects, identifying areas of potential change and focus for FSANZ.

TNSSR developed a questionnaire to reflect these objectives, as well as to allow some comparison to similar international studies. The development process consisted of a review of international research, qualitative discussion groups with consumers in both Australia and New Zealand, and an extensive questionnaire development phase. The research was then conducted via an online survey of n=1200 Australians and n=800 New Zealanders aged 14 years and older. The final data were weighted to best reflect the demographic profile of each population.

The research found that most respondents played a role in grocery purchasing and cooking in the home, and that most respondents had in mind particular dietary or food concerns when shopping, with weight concerns, specific health concerns and allergies the most common concerns. Around half of respondents (49% of Australians and 52% of New Zealanders) reported they paid a medium level of attention to a healthy diet, and a further large proportion paid a high level of attention (34% of Australians, 30% of New Zealanders), with only a very small number (4% Australia and New Zealand) reporting they paid a low level of attention to a healthy diet.

However, when assessed against wider issues, healthy eating is of less concern for consumers than issues such as drought/water shortages (in Australia), household finances/cost of living, crime levels (New Zealand) and pollution/environmental issues. Twenty three percent of Australians and 25% of New Zealanders identified healthy eating as a major concern, compared with 9% and 7% of Australians and New Zealanders, respectively, identifying food safety as a major concern.

Overall confidence in the food supply as a whole was at a positive level, with consumers in New Zealand significantly more confident in the safety of the food supply as a whole than Australian consumers. Around two in five Australian consumers (43%) thought food safety had stayed the same in the past year. New Zealand consumers were significantly more likely to believe food safety had stayed about the same (49%). Australian consumers were significantly more likely to say food safety was a 'little worse' (22%) compared to New Zealand consumers (11%).

The research found that almost a third of respondents (32% of Australians and 30% of New Zealanders) thought they had suffered from food poisoning in the past year, with the majority of these respondents thinking this was from food purchased outside the home. Very few respondents reported their condition to anyone, with a doctor or other health professional being the most common person the condition was reported to among those who did report it.

Around half of Australian respondents (51%) and around two in five New Zealand respondents (39%) reported having concerns about the safety of particular types of foods. Foods most commonly nominated (unprompted) by those who had concerns were fresh fruit/vegetables, meat and raw chicken/poultry. The latter was particularly of concern for New Zealand respondents.

The most commonly identified concerns with food generally in Australia were, food poisoning (such as Salmonella and E.Coli), and the storage times of food sold as fresh, with 48% of Australians nominating these issues as being of concern. Australians had the highest level of concern regarding the use of cloned animals in the food supply, the use of antibiotics/hormones/steroids in meat and food safety/hygiene. In New Zealand consumers were most commonly concerned about food poisoning (such as Salmonella and E. Coli) (43%) and obesity levels in the population (38%) whereas the highest level of concern was in relation to the use of cloned animals in the food supply, genetically modified foods and food safety/hygiene. However, when identifying foods or food issues that may be of concern, it should be noted that consumers are likely to be influenced by issues reported in the media before or at the time the survey took place.

Unprompted awareness of FSANZ was low (8% of Australians and 4% of New Zealanders). When prompted, FSANZ was the most commonly nominated organisation consumers thought had a role in food regulation and monitoring in Australia (60%). FSANZ was the third most commonly nominated organisation for New Zealand consumers (52%) after the Ministry of Health (82%) and the New Zealand Food Safety Authority (NZFSA) (60%), as would be expected given the different role FSANZ plays in New Zealand.

Overall confidence in the organisations providing regulation and monitoring of the food supply was positive with New Zealand consumers significantly more likely (mean score of 4.74 out of seven) than Australian consumers (mean 4.5) to report confidence in organisations in general. Australian consumers were significantly more confident in FSANZ (mean 4.66) compared with their confidence in all organisations regulating and monitoring the food supply. New Zealand consumers had similar levels of confidence in FSANZ (mean 4.64) to Australian consumers, although it was less than their confidence in all organisations regulating and monitoring food. There was support for a high level of regulation for both public health issues and food safety issues in both countries. Australian consumers were significantly more likely to report a desire for a greater level of regulation for both public health and food safety issues than New Zealand consumers. Across both countries there was higher support for greater regulation to manage food safety issues compared with public health issues.

Consumers reported referring to food labels frequently with 33% of Australians and 25% of New Zealanders reporting they always referred to the labelling information when purchasing a product for the first time. There was a clear positive relationship between consumers' health consciousness and dietary concerns and their frequency of referring to labelling information. The most commonly referred-to information was the best before/use by date, the amount of fat, country of origin and the amount of sugar. Eighty four percent of Australians and 81% of New Zealanders cited food labels as the main source of information about the nutritional content of food, with fact sheets/brochures, the internet and magazines/cook books also being frequently cited as sources of information. Respondents agreed strongly with the statement 'I find some information on food labels really useful or important'. Confidence in ability to make informed decisions from food labels was positive for Australian and New Zealand consumers, with New Zealand main grocery buyers significantly more confident in their ability to make informed decisions than non-main grocery buyers. This difference was not evident among Australian consumers. Trust in food labelling was at a lower level than confidence, with Australian consumers significantly less likely to trust the information provided on food labels than New Zealanders.

In both Australia and New Zealand most consumers said they think about food safety and food hygiene when preparing food at home, with 51% of Australians and 47% of New Zealanders involved in food preparation 'always' consciously thinking about food safety and hygiene. Most respondents felt they knew about food safety and hygiene in the home. Australian consumers had only a mild level of concern about getting food poisoning from something prepared at home, and felt a high level of control over food safety in the home. New Zealand respondents were significantly more concerned than Australian respondents about getting food poisoning from something they or someone else prepared at home but rated their control over food safety/hygiene for food prepared at home at a similarly high level to Australia. These results are driving a very high level of overall confidence in food safety in the home in both countries (mean scores of 5.98 and 6.03 out of 7 for Australia and New Zealand respectively).

In the last 12 months, Australian and New Zealand consumers were most frequently concerned about food safety when eating outside the home in takeaway shops, temporary food stalls, supermarkets, sausage sizzles and restaurants. Australians were significantly more likely than New Zealanders to be concerned about food safety in takeaway shops, temporary food stalls, supermarkets, local meat/seafood retailers and deli/specialty/other food retailers. In spite of these concerns, consumers overwhelmingly had not reported their concerns to anyone. Concerns that were reported were most commonly reported to staff at the food outlet. Somewhat inconsistently, confidence in the food safety precautions in the preparation of food was highest for local bakeries, restaurants and supermarket/grocery stores for both Australia and New Zealand. Overall confidence in food safety outside the home was relatively low with a mean score of 4.67 out of 7 for Australians and a significantly higher (but still quite low) mean score of 4.88 for New Zealand consumers.

A standard two tiered multiple regression model was developed to determine the impact of key dependent and independent variables on consumers' overall confidence in the safety of the food supply.

The first (or top) level of the model measured the impact of the four main dependent variables considered in this survey on the overall dependent variable of 'overall confidence in the safety of the food supply'. The four main dependent variables were: consumers overall confidence in food safety when eating out; consumers overall confidence in food safety when eating at home; consumers overall confidence in their ability to make informed decisions from food labelling; and consumers overall confidence in organisations providing regulation and monitoring of the food supply. Together these explained almost 40% of overall confidence in the food supply (39% for Australia and 36% for New Zealand), indicating that there are other factors which are also having a strong impact on overall confidence that have not been captured in this model or are outside the scope of FSANZ work. Consumers' overall confidence in food safety when eating out (47.4% in Australia and 42.5% in New Zealand) and overall confidence in organisations providing regulation and monitoring of the food supply (38.9% in Australia and 44.6% in New Zealand) were the most important dependent variables driving the overall confidence in the safety of the food supply.

The second (or underlying) level of the regression model assessed the impact of a range of independent variables on the four main dependent variables considered above: consumers overall confidence in food safety when eating out; when eating at home; in ability to make decisions from food labels; and in organisations regulating and monitoring the food supply. Independent variables were drawn from key questions within the survey. Key findings of the analysis were:

- the independent variable with the greatest impact on consumers' overall confidence in their ability to make an informed decision from food labelling was trust in the information in food labels (29.6% for Australia and 32.3% for New Zealand). Ease of understanding and use of food labels also had a strong impact on overall confidence but was of greater importance among New Zealand consumers (30.8%) than Australian consumers (19.2%);
- the strongest impacts on Australian consumers' overall confidence in food safety when eating at home were their level of perceived control over food safety (40.2%) and their level of knowledge about food safety (26.2%). This was reversed for New Zealand consumers with a 42.2% impact on overall confidence in food safety when eating at home derived from knowledge about food safety, and a 30.3% impact derived from the level of perceived control over food safety;
- consumers' overall confidence in food safety when eating out was impacted by consumers' confidence in food safety precautions at different types of food outlets. Restaurants had the strongest impact accounting for 33% (Australia) and 35.5% (New Zealand) of overall confidence; and
- as the organisations responsible for food regulation and monitoring were relatively unknown, it was not possible to determine the key drivers of overall confidence in organisations providing regulation and monitoring of the food supply.