

Appendix 1 Hypotheses

Hypothesis 1a:

That a product with a high level claim is not perceived by consumers to communicate greater health benefits about a product than a product with a general level and nutrition content claim, a product with a nutrition content claim or a product with no claim at all.

Hypothesis 1b:

That a product with a high level health claim is not perceived by consumers to have a greater impact on intended purchase than a product with function and nutrition content claim, a product with a nutrition content claim or a product with no claim at all.

Hypothesis 2a:

That an endorsement (non-specific and classified as a general level claim) is not perceived by consumers as having greater credibility than a non-specific general level claim (eg whole of diet claim), an equivalent specific general level claim or an equivalent high level claim.

Hypothesis 2b:

That an endorsement (non-specific and classified as a general level claim) is not perceived by consumers to communicate health information more effectively than a non-specific general level claim (eg whole of diet claim), an equivalent specific general level claim or an equivalent high level claim.

Hypothesis 2c:

That an endorsement (non-specific and classified as a general level claim) is not perceived by consumers to have a greater impact on intended purchase than a non-specific general level claim (eg whole of diet claim), an equivalent specific general level claim or an equivalent high level claim.

Hypothesis 3a:

An implicit health claim, when expressed as either a graphic or as a brand name, is not perceived differently by consumers to an explicit general level or high level health claim in relation to the communicated health benefit of the food.

Hypothesis 3b:

An implicit health claim, when expressed as either a graphic or as a brand name, is not perceived by consumers to have a greater impact on intended purchase than an explicit general level or high level health claim

Hypothesis 4:

That a nutrition content claim with a message device on the front of a food package is not perceived by consumers to communicate health information more effectively than 1) a nutrition content claim with a message device and a reference guide or 2) a nutrition content claim with no message device.

Hypothesis 5:

That a product carrying a cause-related marketing claim on its label is not perceived by consumers to be providing more of a health benefit than a product without a cause-related marketing claim.

Appendix 2

Proposed claims classification framework

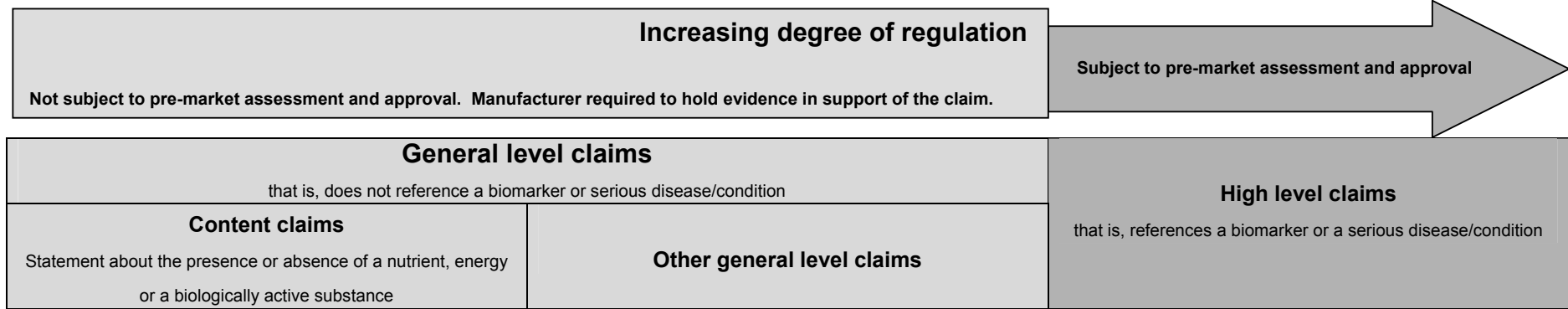
Claims Classification Framework

The Policy Guideline outlines a claims classification framework, which distinguishes between two broad categories of claims: general level claims and high level claims. As referred to earlier, the classification of a claim is based on the degree to which the potential health benefits arising from the use of nutrition, health and related claims are balanced against the potential risks of an adverse outcome arising from the misinterpretation of the claim or an inappropriate use of the claim. The Policy Guideline states that the level of the claim, as determined by the Claims Classification Framework, will determine the degree to which the claim is regulated.

Table 1 outlines FSANZ's interpretation of the Claims Classification Framework, based on the two broad categories of claims: general level claims and high level claims. In addition, using examples provided in the Policy Guideline, FSANZ has identified several sub-categories of claims which fall into one or the other of the two broad categories of claim on the basis of whether or not they refer to a biomarker or a serious disease or condition.

Note. The examples of claims provided in this Report are for illustrative purposes only. They are not intended to represent how claims should be expressed according to any future regulatory framework for nutrition, health and related claims.

Table 1: Policy Guideline Claims Classification Framework



<p>Examples</p> <p>Absolute content claim Describe or indicate the presence or absence of a component in the food (nutrient, energy or biologically active substance). For example, 'this food is high in calcium' (Page 4 of Policy Guideline)</p> <p>Comparative content claim Describe or indicate the presence of a component in a food in comparison to other similar foods For example, 'reduced fat'</p>	<p>Examples</p> <p>Function claim See the maintenance of good health or normal functions of the body. For example 'calcium is good for strong bones and teeth' (Page 4 of Policy Guideline) See specific benefits for performance and wellbeing in relation to foods. For example 'gives you energy' (Page 5 of Policy Guideline) NB. Depending on the wording of a performance and wellbeing claim it could be placed in either the function or enhanced function sub-category</p> <p>Enhanced function claim Describes how a diet, food or component can modify a function or body structure beyond its role in the normal development and maintenance functions of the human body For example 'exercise and a diet high in calcium and calcium containing foods like this product may help give you stronger bones'</p> <p>Risk reduction (ref to non-serious disease) claim See the potential for a food or component to assist in reducing the risk of or helping to control a non-serious disease or condition. For example, 'yoghurt high in acidophilus as part of a healthy diet may reduce your risk of stomach upsets' (Page 5 of Policy Guideline)</p> <p>Whole of diet claims (based on the Australian Dietary Guidelines and the New Zealand Food and Nutrition Guidelines). For example, 'a healthy, balanced diet that includes dietary fibre</p>	<p>Examples</p> <p>Biomarker maintenance claim For example, 'this food is high in Omega-6 fatty acids which may help to maintain normal blood cholesterol'</p> <p>Biomarker enhancement claim For example, 'This food is high in Omega-6 fatty acids which may help to reduce blood cholesterol levels'</p> <p>Risk reduction (ref a serious disease) claim See the potential for a food or component to assist in:</p> <ul style="list-style-type: none"> controlling, reducing the risk of, or improving, a serious disease or condition; or are whole of diet claims (based on the Australian Dietary Guideline or the New Zealand Food and Nutrition Guidelines) which refer to a biomarker or a serious disease or condition <p>For example, 'this food is high in Omega-6 fatty acids, which as part of a diet low in saturated fat and high in soluble fibre may reduce the risk of developing heart disease'</p> <p>For example, 'a healthy diet that may lower your risk of certain kinds of cancer is one that is low in fats and includes fibre from a number of sources including a variety of fruits and vegetables, and wholegrain and bran cereals' (Page 6 of Policy Guideline)</p>
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Appendix 3

TNS Online Panel

The representativeness of the TNS Panel

The proportion of adults (and children) accessing the internet in Australia grows apace. In terms of the total adult population, over 70% (according to the latest TNS Omnibus study) now access the internet regularly. As such, the population accessing the internet was increasingly representative of the overall population. Currently, the TNS panel has over 200,000 active members.

However, of this 70%+, there were marked differences by demographic. Amongst the younger age groups, regular usage of the internet can reach 85%. Only amongst older demographics, aged 64 plus, does internet usage fall away markedly. This group was however the fastest growing in terms of internet participation.

The size of the TNS panel allowed selection of extremely large samples that are representative of the Australian population in terms of age, gender and location. For the current study, as discussed in the methodology section of this report, quotas were set on age to ensure that a representative sample was achieved.

The final evidence of the representativeness of the TNS research and panel were based upon validations – the direct comparison of results collected from other methodologies and sampling techniques versus the TNS panel. For the current research, the sample achieved was demographically consistent with ABS population figures and samples achieved by TNS in past research for FSANZ, both for Australia and New Zealand. However, it was important to consider that because this sample was ‘main grocery buyer’ it was not possible to validate it against ABS population figures or population figures for New Zealand, as these figures were based on the total population.

Appendix 4 Questionnaire

Quantitative consumer research on nutrition, health and related claims

Final Questionnaire

(Note: all proposed modules have been included in this draft questionnaire, for reviewing purposes. Once modules have been finalised, separate questionnaires for each sample group will be produced)

MODULE 1: INTRODUCTION AND INSTRUCTIONS

Hello from TNS Australia. Thank you for agreeing to participate in this survey.

Please remember:

- Your views are important to us and your answers will be kept in the strictest confidence.
- None of the responses you give are directly linked to you as an individual. They are used purely for statistical purposes only. To see our privacy statement click [here](#).
- [Privacy Policy](#)
- The survey incentives and expected length are outlined in the invitation e-mail.
- Even if you are unable to complete the survey you will still receive incentive points

We are undertaking some important research into food labelling and how consumers make decisions about the food they buy. The research is being undertaken on behalf of Food Standards Australia New Zealand.

The information and opinions you provide will only be used for research purposes. The survey will take around 25 minutes, depending on your answers.

Throughout the survey, we will be showing you pictures of foods and labels you might see at the supermarket. The items shown are simply for research purposes and, where possible, were selected from products generally available in the Australian and/or New Zealand food supply. Some will be real products, others will be graphics or products modified in some way. Sometimes the pictures will look very similar, and sometimes there will be differences. The materials used were chosen only on the basis of their suitability for this research, you should not draw any inferences from the inclusion of particular brands or food types.

You will be asked to look at each product and answer some questions about each one. None of the options given may apply exactly, or perhaps more than one could apply, but for each answer please choose which one is the closest match.

To answer a question: Most questions have a round button to click or a tick box to check. Click on the box or button that best describes your answer to each question. Sometimes you may need to type in your answer in the spaces provided.

If you forget to answer a question, or miss part of a question, then a message reminding you that the question needs to be answered will appear. If this happens, you need to complete your answer to carry on with the survey. Sometimes you'll need to scroll across or down the page to see all of the possible answers.

To change an answer: For questions with a single choice, click on a different button. For questions with multiple choices (tick boxes), to clear the box and make a new choice, click again on your original answer.

To go to the next question: When you've finished answering a question, click the Next button at the bottom of the screen. On each page the next button will appear after 5 seconds.

To pause the survey and return to it later: Simply close the window and click on the link in the invitation e-mail to resume.

Dial-up users: If you are on a dial up modem or other slow connection, some of the questions may take a few moments to load. Please be patient.

To begin the survey, click on the button below. As you move through the survey please do not use your browser buttons to change pages - use the buttons at the bottom of each screen.

Let's start with some questions about you.

Q1.1 Are you mainly or jointly responsible for the grocery shopping in your household?

- Yes 1
- No.....2 (TERMINATE)

Q1.2 Here are five statements about buying food. Please choose the one which best describes how you feel when buying food for your household.

- I'm not at all concerned about the health or nutritional value of the foods that I choose..... 1
- I usually don't worry about the health or nutritional value of the foods that I choose.....2
- I sometimes like to choose healthy or nutritious foods 3
- I regularly choose the healthy or nutritious alternative 4
- I always choose the healthy or nutritious alternative 5

MODULE 1: DEMOGRAPHICS

Q1_3 Which age group are you in?

- 18-24 1
- 25-34 2
- 35-44 3
- 45-54 4
- 55-64 5
- 65 or over 6

Q1_4 Sex?

- Male 1
- Female 2

Q1_5 And where are you located?

- Australia 1
- New Zealand 2

Q1_6 Do any of the following apply to you or any members of your family? Please indicate as many as apply.

- Food allergy to nuts 1
- Food allergy to seafood, or fish, or milk, or gluten, or eggs, or soybeans 2
- Asthma 3
- Diabetes 4
- Heart disease 5
- Health concerns such as high blood pressure or cholesterol 6
- Digestive concerns such as coeliac disease, irritable bowel syndrome 7
- Special diet for weight loss 8
- Migraine 9
- Pregnancy or breast feeding... 10
- Vegetarian / vegan 11
- Religious / ethical beliefs 12
- Training for sports 13
- No, none 16

Q1_7a (if answered "Australia" in Q1_5) What is the highest education level that you have achieved?

- Never attended school 1
- Primary school only 2
- Secondary school up to Year 10 3
- Secondary school up to Year 11 or 12 4
- Trade qualifications 5
- Certificate (non-trade) / diploma 6
- Bachelor degree 7
- Higher qualifications 8

Q1_7b (if answered "New Zealand" in Q1_5) What is the highest education level that you have achieved?

- Never attended school 1
- Primary school only 2
- Secondary school up to Form 5 3
- Secondary school up to Form 6 or 7 4
- Trade qualifications 5
- Certificate (non-trade) / diploma 6
- Bachelor degree 7
- Higher qualifications 8
- Refused 9

Q1_8 Which of these statements best describes your annual total household income (before tax)?

- Less than \$25,000 1
- \$25,000 to \$39,999 2
- \$40,000 to \$74,999 3
- \$75,000 to \$100,000 4
- More than \$100,000 5

MODULE 3: HEALTH CLAIMS INFLUENCE AND MODULE 4: REGULATION OF HIGH LEVEL CLAIMS (COMBINED)

NOTES: One product, 4 variations

Product Group – Bread and omega claim

1. Product with no claim - bread with no claim
2. Product with nutrition content claim, - bread with “high in omega” claim
3. Product with function claim – bread with omega content claim from 2. and add “A diet high in omega helps maintain healthy veins and arteries.”
4. Product with high level claim. – bread with omega content claim from 2. and add “A diet high in omega helps reduce the risk of heart disease”

Q3.0 How familiar are you with ‘omega’? This includes omega-3 and omega-6. Would you say you are...

- Very familiar 1
- Somewhat familiar 2
- Neither familiar nor unfamiliar .3
- Somewhat unfamiliar 4
- Very unfamiliar 5

Q3.1a Who would be most likely to benefit from eating this product? Choose no more than three groups.

- Women..... 1
- Men 2
- Children..... 3
- Babies 4
- Pregnant women..... 5
- Older people..... 6
- People trying to lose weight.... 7
- People with particular health problems 8
- All types of people..... 9
- Don’t know..... 10

Q3.1b. Which of the following benefits would you get from eating this product? (Rotate order)

- There are no health benefitsyes/ no /not sure
- There are no nutrition benefitsyes/ no /not sure
- A reduced risk of osteoporosis..... yes/ no /not sure
- A reduced risk of heart disease yes/ no /not sure
- A reduced risk of cancer yes/ no /not sure
- Assistance in heart health..... yes/ no /not sure
- A diet lower in fat..... yes/ no /not sure
- A diet higher in omega..... yes/ no /not sure
- Maintenance of healthy veins and arteries yes/ no /not sure
- If there are any other health benefits please specify.....

Q3.1c If they were to eat this product regularly, how much effect on health would you expect it to have? Please rate on a scale of one to ten, where one is “no effect at all” and ten is “extremely effective”, or choose ‘Don’t know’.

No effect at all										Extremely effective										Don't know/ Not Applicable
1	2	3	4	5	6	7	8	9	10											
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>											<input type="checkbox"/>

Q3.2 For each of the following statements, please indicate how much you agree or disagree, using the scale provided.

	Strongly agree	Tend to agree	Neither	Tend to disagree	Strongly disagree	Don't know/ Not Applicable
Eating this one product regularly can improve your health	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If someone were to eat this product regularly, they would be less likely to require heart medication	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I would expect this product to have enough of the nutrients in it to have a health benefit as claimed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If someone were to eat this product regularly, it would be less important for them to watch what else they eat	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If someone were to eat this product regularly, it would be less important for them to exercise for health	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q3.3 Which of the following information on the product would you use to decide if this claim is true?

- I don't pay any attention to nutrition and health claims on food labels... ..1
- The list of ingredients2
- The nutrition information panel, which says how much of each of the major nutrients is in the product3
- Allergen declarations, such as “contain nuts”4
- Endorsements, such as the Heart Foundation’s Tick Program.....5
- Pictures on the label.....7
- Other, please specify.....8
- Don't need any other information.....9

Q3.4 How likely are you to purchase this product?

- Very likely..... 1
- Somewhat likely2
- Neither likely nor unlikely3
- Somewhat unlikely4
- Very unlikely.....5

MODULE 5: REGULATION OF ENDORSEMENTS

NOTES: One product, 4 variations.

Product Group: Tinned salmon

- 1. Product with non-specific endorsement, - NHF tick only
- 2. Product non-specific general level claim – delete tick, add claim “this food is part of a healthy diet”
- 3. Product with specific general level claim – delete tick, add claim “a diet low in saturated fat is beneficial for a healthy heart. This product is low in saturated fat”.
- 4. Product with high level claim – delete tick, add claim “ A diet low in saturated fat helps reduce the risk of heart disease. This product is low in saturated fat”

Q5.0 How much do you feel you can trust the information given to you by this product?

- I trust what it says completely 1
- I mostly trust what it says 2
- I'm not sure whether to trust it or not 3
- I mostly don't trust what it says 4
- I don't trust what it says at all.. 5

Q5.1a Who would be most likely to benefit from eating this product? Choose no more than three groups.

- Women..... 1
- Men 2
- Children..... 3
- Babies 4
- Pregnant women 5
- Older people..... 6
- People trying to lose weight.... 7
- People with particular health problems 8
- All types of people..... 9
- Don't know.....10

Q5.3 Which of the following information on the product would you use to decide if this claim is true?

I don't pay any attention to nutrition and health claims on food labels.....	1
The list of ingredients	2
The nutrition information panel, which says how much of each of the major nutrients is in the product	3
Allergen declarations, such as "contain nuts"	4
Endorsements, such as the Heart Foundation's Tick Program.....	5
Pictures on the label.....	7
Other, please specify.....	8
Don't need any other information.....	9

Q5.4 How likely are you to purchase this product?

Very likely.....	1
Somewhat likely	2
Neither likely nor unlikely	3
Somewhat unlikely	4
Very unlikely.....	5

MODULE 6: REGULATION OF IMPLIED CLAIMS

NOTES: One product, 4 variations

Product Group: Yoghurt

1. Product with implied [brand] health claim ("Pro-Bone Yoghurt"/ "Vanilla Yoghurt", "High in calcium") --NOTE no graphic
2. Product with implied [graphic] health claim (Dairy lady graphic/ "Vanilla Yoghurt", "High in calcium"), --NOTE no brand name
3. Product with explicit general level health claim. ("Vanilla Yoghurt"/ "A diet high in calcium helps maintain strong bones. This food is high in calcium") --NOTE no graphic or brand name
4. Product with high level claim ("Vanilla yoghurt" / "A diet high in calcium helps reduce the risk of osteoporosis. This food is high in calcium") - NOTE no graphic or brand name

Q6.1a Who would be most likely to benefit from eating this product? Choose no more than three groups.

- Women..... 1
- Men 2
- Children..... 3
- Babies 4
- Pregnant women 5
- Older people..... 6
- People trying to lose weight..... 7
- People with particular health problems 8
- All types of people..... 9
- Don't know..... 10

Q6.1b. Which of the following benefits would you get from eating this product? (Rotate order)

- There are no nutrition benefits..... yes/ no /not sure
- There are no health benefits..... yes/ no /not sure
- A reduced risk of osteoporosis..... yes/ no /not sure
- A reduced risk of diabetes. yes/ no /not sure
- Maintenance of strong bones..... yes/ no /not sure
- A diet lower in fat..... yes/ no /not sure
- A diet lower in sugars..... yes/ no /not sure
- A diet higher in unsaturated fats yes/ no /not sure
- A diet high in calcium yes/ no /not sure
- If there are any other health benefits please specify.....

Q6.2 Which of the following information on the product would you use to decide if this claim is true?

- I don't pay any attention to nutrition and health claims on food labels..... 1
- The list of ingredients 2
- The nutrition information panel, which says how much of each of the major nutrients is in the product 3
- Allergen declarations, such as "contain nuts" 4
- Endorsements, such as the Heart Foundation's Tick Program..... 5
- Pictures on the label..... 7
- Other, please specify..... 8
- Don't need any other information..... 9

Q6.3 How likely are you to purchase this product?

- Very likely..... 1
- Somewhat likely 2
- Neither likely nor unlikely 3
- Somewhat unlikely 4
- Very unlikely..... 5

MODULE 7: MESSAGE DEVICES

NOTES: One product, 3 variations

Product : Muesli bars

1. Product with claim: Front of pack with content claim/ side of pack with NIP and ingredient list
2. Product with claim and MD: Front of pack with content claim and MD –“See nutrition information for fat content” / side of pack with NIP and ingredient list (basic NIP)
3. Product with claim and MD: Front of pack with content claim and MD – “See nutrition information for fat content” / side of pack with NIP, guide to fat content and ingredient list

Product 1 is always shown first. Products 2 and 3 are rotated

Q7.1, Q7.2 are not asked about product 1. All questions to be asked about products 2 and

3. Questions to be asked in the order they are presented – not in numerical order. Product and NIP picture must remain visible while respondent is answering questions

Q7.1 What would you do if you saw the statement “see nutrition information for fat” on the front of the package?

Ignore the statement because the message is confusing

Ignore the statement because the message is irrelevant

Look for more information on the package on fat

Do something else (please specify)

Q7.2 What do you think the statement “See nutrition information for fat” on the front of the package means? (tick as many answers as necessary)

Don't know what it means

Think that the manufacturer is legally required to put it there

Think that the manufacturer is trying to highlight fat favourably

Think that I am supposed to look for information on fat elsewhere on the package

Think that the food must be high in fat

Think that the food must be low in fat

Think something else (please specify)

Q7.3 Would you say this product has a low, medium or high amount of fat?

Q7.4 How confident are you in your answer to Q7.3?

Extremely confident	Very confident	Somewhat confident	Not very confident	Not at all confident	Don't know/ Not Applicable
<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	<input type="checkbox"/>

Q7.5_2 (ask for product 1 and 2) What information did you use to answer Q7.3?

Your general knowledge

The ingredient list

The nutrition information panel

The nutrition claims

The illustrations on the label

Other (Please specify)

Q7.5_3 (ask for product 3) What information did you use to answer Q7.3?

Your general knowledge

The ingredient list

The nutrition information panel

The guide to fat levels

The nutrition claims

The illustrations on the label

Other (Please specify)

Q7.6 Overall, how healthy would you rate this product? Please rate on a scale of one to ten where one is “not at all healthy” and ten is “extremely healthy”.

Not at all healthy		Extremely healthy								Don't know/ Not Applicable
1	2	3	4	5	6	7	8	9	10	
<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	<input type="checkbox"/> ₆	<input type="checkbox"/> ₇	<input type="checkbox"/> ₈	<input type="checkbox"/> ₉	<input type="checkbox"/> ₁₀	<input type="checkbox"/>

MODULE 8: CAUSE RELATED MARKETING

Product Group: Can of beans graphic, add text “ Proceeds from this product will go to the Royal Society for Diabetes”

1. Product with cause related claim
2. Product with no claim

Q8.1 Which of the following benefits would you get from eating this product? Choose all that apply.

- There are no nutrition benefitsyes/ no /not sure
- There are no health benefits.....yes/no/not sure
- A reduced risk of heart disease yes/ no /not sure
- A reduced risk of diabetes yes/ no /not sure
- A reduced risk of cancer yes/ no /not sure
- A diet lower in fat..... yes/ no /not sure
- A diet lower in sugars..... yes/ no /not sure
- A low glycaemic index (GI) yes/ no /not sure
- A diet higher in fibre yes/ no /not sure
- If there are any other health benefits please specify.....

