

Report on the monitoring of the implementation of the Health Star Rating system: Key findings for Area of Enquiry Two – Consumer awareness and ability to use the Health Star Rating system correctly – July 2017

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SUMMARY OF KEY FINDINGS

AWARENESS OF HEALTH STAR RATING SYSTEM

- Excluding brand names, the Health Star Rating system remains the third most recognised (unprompted), food logo in the supermarket.
- Unprompted awareness continues to be higher amongst females ($p < .0001$) and those under 35 years old ($p < .0001$). Furthermore, unprompted awareness is higher for those with a body mass index in the healthy weight range compared to those with a body mass index in the overweight or obese weight range ($p = .0003$).
- Additionally, unprompted awareness is higher for those with an annual household income of more than \$100,000 per annum when compared to households whose annual income is below \$50,000 ($p < .0001$).
- Unprompted awareness of the Health Star Rating system has decreased significantly by two percentage points from 17 percent in March 2017 to 15 percent in July 2017 which indicates that the Health Star Rating system is not 'front of mind' for most Australians.
- However prompted awareness of the Health Star Rating system remains high, with the Health Star Rating System logo being the most commonly recognised logo on food packaging, at 78 percent. When compared to July 2016, prompted awareness has significantly increased by 11 percentage points ($p < .0001$).

UNDERSTANDING WHAT THE HEALTH STAR RATING SYSTEM REPRESENTS

- Amongst Australians who were aware of the Health Star Rating system, there has been a significant increase by 9 percent, to 56 percent (c.t. March 2017) who were aware that the Health Star Rating system is a rating scale of the healthiness of a food product.
- There has been a significant increase (c.t. March 2017), to the proportion of Australians who correctly understand the Health Star Rating system. In July 2017, 64 percent of respondents correctly identified that a product with one star is unhealthy or has little nutritious value ($p = .05$), and 89 percent identified that a product with five stars is the healthiest choice and good for you ($p = .005$).

USE OF HEALTH STAR RATING SYSTEM

- In line with awareness, there has been minimal change this wave to the proportion of Australians who recall purchasing a product with the Health Star Rating system in the past three months.
- Recall of having purchased a product with the stars in the past three months remained unchanged across all age groups, genders, location, language spoken at home and household structure. The only significant changes observed were for those with a BMI in the overweight or obese range (≥ 25), for which a significantly greater proportion of respondents recalled having purchased a product with the Health Star Rating system when compared to the previous wave ($p = .0001$).

- More than three in five Australians who purchased a product with the Health Star Rating system reported that it had influenced their product choice, and one in two purchased a product they wouldn't normally buy due to the presence of the Health Star Rating system. Additionally, close to nine in ten respondents who were influenced stated they will continue to purchase the product.

ADVERTISING AWARENESS

- Compared to this time last year, there has been a significant increase to the proportion of Australians who could recall seeing or hearing any advertising or promotions about the Health Star Rating system in the past three months ($p < .0001$).
- There have been no significant changes as to where Australians saw or heard advertising, aside from an increase in respondents who recall seeing in-store promotions ($p < .0001$). Like the previous wave, respondents were most likely to recall advertising on the television (41%), or having seen the Health Star Rating on food packaging (38%).
- There has been a significant decrease to the proportion of Australians who had seen advertising for a product with the Health Star Rating system, and were subsequently influenced to purchase a product that they wouldn't usually buy (c.t. March 2017, $p = .04$).
- One in three respondents who had seen or heard advertising stated that the advertising did not affect their shopping habits.

PERCEPTIONS AND ATTITUDES TOWARDS THE HEALTH STAR RATING SYSTEM

- Most Australians view the Health Star Rating system as trustworthy (56%), easy to understand (74%), and easy to use (75%). Additionally, more than half of the respondents agree that the system is open and transparent (54%), and relevant to them and their family (58%).
- Most Australians agree that the Health Star Rating system is credible (58%), reliable (58%), and makes choosing food easier (62%). However, when compared to the March 2017 result, public perception of the system as both credible and reliable has decreased by four percentage points ($p = .01$).

CONFIDENCE IN THE HEALTH STAR RATING SYSTEM

- Two thirds of Australians have high confidence in the Health Star Rating system.
- For those who had low confidence in the system, more than a third stated that they believe the system is not accurate or reliable (36%), others felt the system is misleading (20%), or that the stars can be bought (19%).