

Report on the monitoring of the implementation of the Health Star Rating system: Key findings for Area of Enquiry 2 – Consumer awareness and ability to use the Health Star Rating system correctly

Prepared for the Commonwealth Department of Health

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For a copy of the full report, please contact the Front-of-Pack Labelling Secretariat

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Executive summary

Context and background

The Health Star Rating (HSR) system is a front of pack labelling (FoPL) system that rates the overall nutritional profile of packaged foods to assist consumers in making informed food purchases. It was introduced in June 2014, with participation voluntary.

To monitor the implementation of the HSR system, and evaluate its impact, the Department of Health has engaged the Heart Foundation, leveraging its comprehensive food database, FoodTrack™.

The monitoring is broken into three areas of enquiry:

1. Label implementation and consistency with the HSR system Style Guide
2. Consumer awareness and ability to use the HSR system correctly
3. Nutrient status of products carrying a HSR system label.

The focus of this report is on area of enquiry 2 (AoE2): Consumer awareness and ability to use the HSR system correctly. The objective of AoE2 is to monitor and track consumer awareness, attitudes and interaction with the HSR system, with a national survey of Australian households.

The survey has been undertaken at least twice per year since September 2015, with each survey exploring:

- General supermarket shopping behaviour;
- Awareness of food logos;
- Knowledge and understanding of the HSR system;
- Purchasing behaviour;
- Awareness and influence of advertising; and
- Attitudes and perception of the HSR system.

This report presents the most recent findings from a consumer awareness survey, undertaken during the period April - July 2018.

Key findings

Awareness of the HSR system

One in five respondents were able to recall the HSR logo unprompted (20 percent). While this is still just behind the Heart Foundation Tick (21 percent), unprompted awareness of the HSR logo has grown substantially over the past year, and it is now the second most recognised food logo, having overtaken the “Australian made” symbol (15 percent).

Prompted, the HSR remains the most well recognised logo on food packaging, with 84 percent of respondents aware of the HSR system. This is a significant increase from both September 2015, when just 53 percent of respondents were aware of the HSR system, and an increase by more than 8 percent when compared to this time last year.

Young and female respondents are more likely to be aware of the HSR system than those older or male.

Interpreting the HSR system

More than one in two people correctly understand that the HSR system is a rating or guide to the healthiness of a product (51 percent) and helps consumers to identify healthier food options within the same food

category (80 percent). Consumers also understand that the more stars a product has, the healthier it is, relative to other food items (75 percent).

However, only three percent of consumers understand that the HSR provides a comparison of food products of similar type, with some respondents believing the HSR can be used across food categories. This indicates that while consumers have a good general understanding of how to interpret the HSR, they don't have such a strong grasp on the nuances of the system.

Using the HSR system, fresh produce and healthiness.

In this survey additional questions were included to explore further the relationship between the HSR system, purchasing of fresh produce, and absolute 'healthiness'.

More than one in two consumers (51 percent) mostly buy a mixture of packaged/processed foods and fresh produce and the vast majority are aware that the HSR is typically only displayed on packaged and processed foods not fresh foods (83 percent). Furthermore, 35 percent of consumers were encouraged by the HSR to buy more fresh produce.

Respondents were also asked to identify how many stars do they believe indicates a healthy or an unhealthy product. A clear majority identified the logo with all five stars as being the healthiest option (71 percent), and in turn identified the logo option with the least number of stars (half a star), as an unhealthy product (70 percent).

HSR and purchasing behaviour

More than 70 percent of respondents recall purchasing a product with a HSR in the last 3 months, with 47 percent saying they 'always' or 'most of the time' include a HSR product in their shopping basket.

Younger, male, and those in a healthy weight range are more likely to have purchased a HSR product than older, female and obese or overweight respondents.

When shopping, three in five (61 percent) respondents reported being influenced by the HSR system in their purchasing decision, which has remained relatively stable over time. Of the people influenced, 36 percent were influenced to buy a product with more stars they don't often buy.

Interestingly there has been a decrease in the proportion of respondents who believe the HSR will influence their future purchasing decision: in September 2015, 72 percent of respondents stated they would be influenced by HSR in future purchases, which has fallen to 55 percent in July 2018.

Awareness and influence of HSR advertising

Less than one in five (18 percent) of respondents recall hearing, seeing or reading any advertising or promotion of the HSR system, which is a statistically significant decrease since July 2017.

For those that do recall HSR advertising, 74 percent were influenced to buy a product that they wouldn't normally. This indicates that advertising has an important influence over consumers' decision to purchase products.

Attitudes and perceptions of the HSR system

The majority of respondents have a positive view of the HSR system, with 61 percent of respondents agreeing that the system is trustworthy, credible (62 percent), reliable (62 percent) and open and transparent (59 percent).

Overall, the majority of respondents believe the system is easy to use (70 percent), understand (77 percent), and makes choosing food easier (72 percent).

More than two-thirds of respondents reported that their confidence in the system is high, or somewhat high (70 percent).