



harris
INTERACTIVE

AHEAD OF WHAT'S NEXT.

The Impact of Labelling on Consumer Choice

A little bit about Harris Interactive

- Harris Interactive is one of the world's leading custom market research firms.
- Known widely for the Harris Poll and for pioneering innovative research methodologies, we offer expertise in a wide range of industries.
- Serving clients in over 215 countries and territories through our European, North American and Asian offices
- Harris specialises in delivering research solutions that help our clients stay ahead of what's next.
- **FDF partner** – recently conducted consumer research across a wide range of food issues including labelling

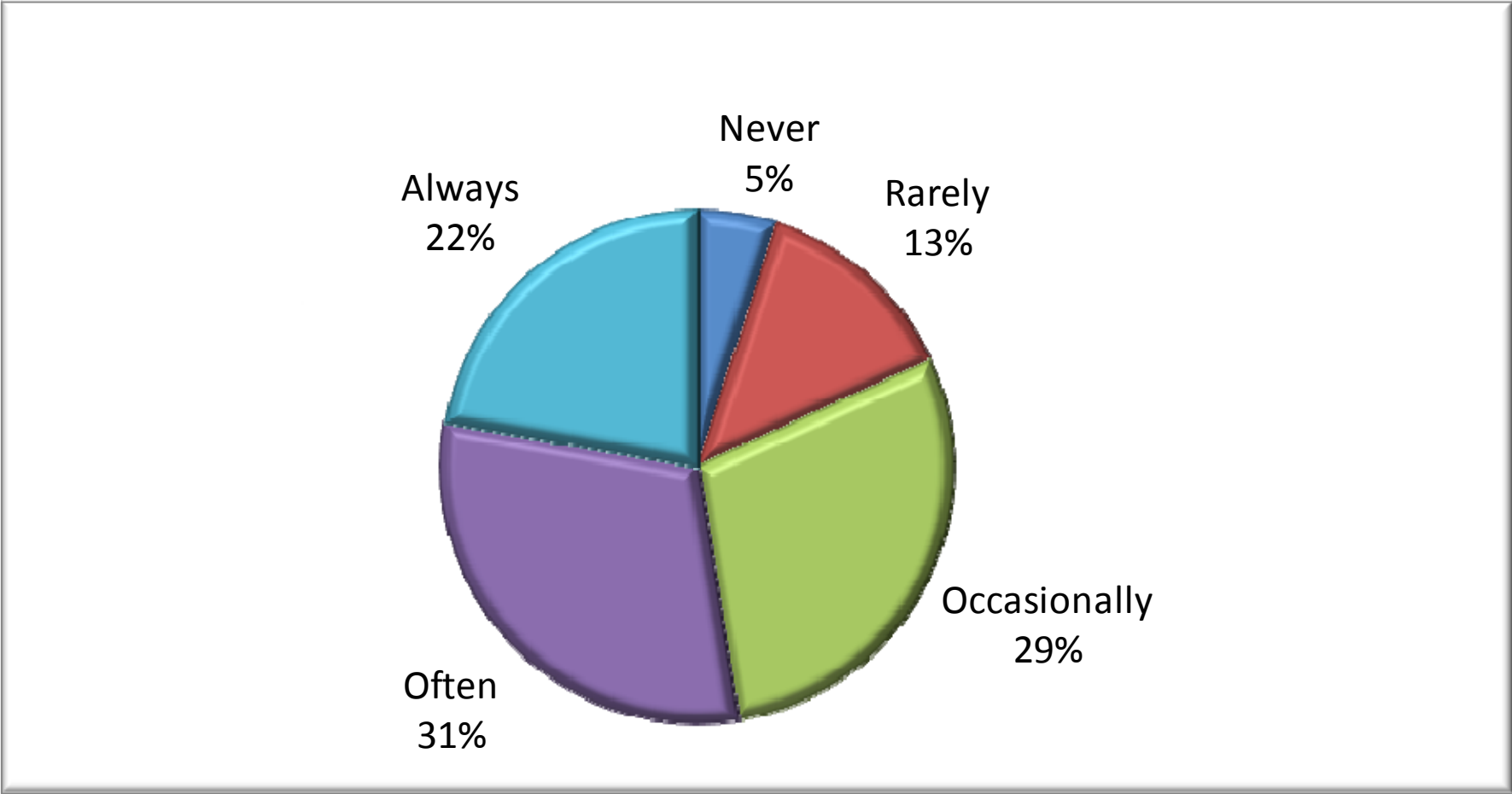




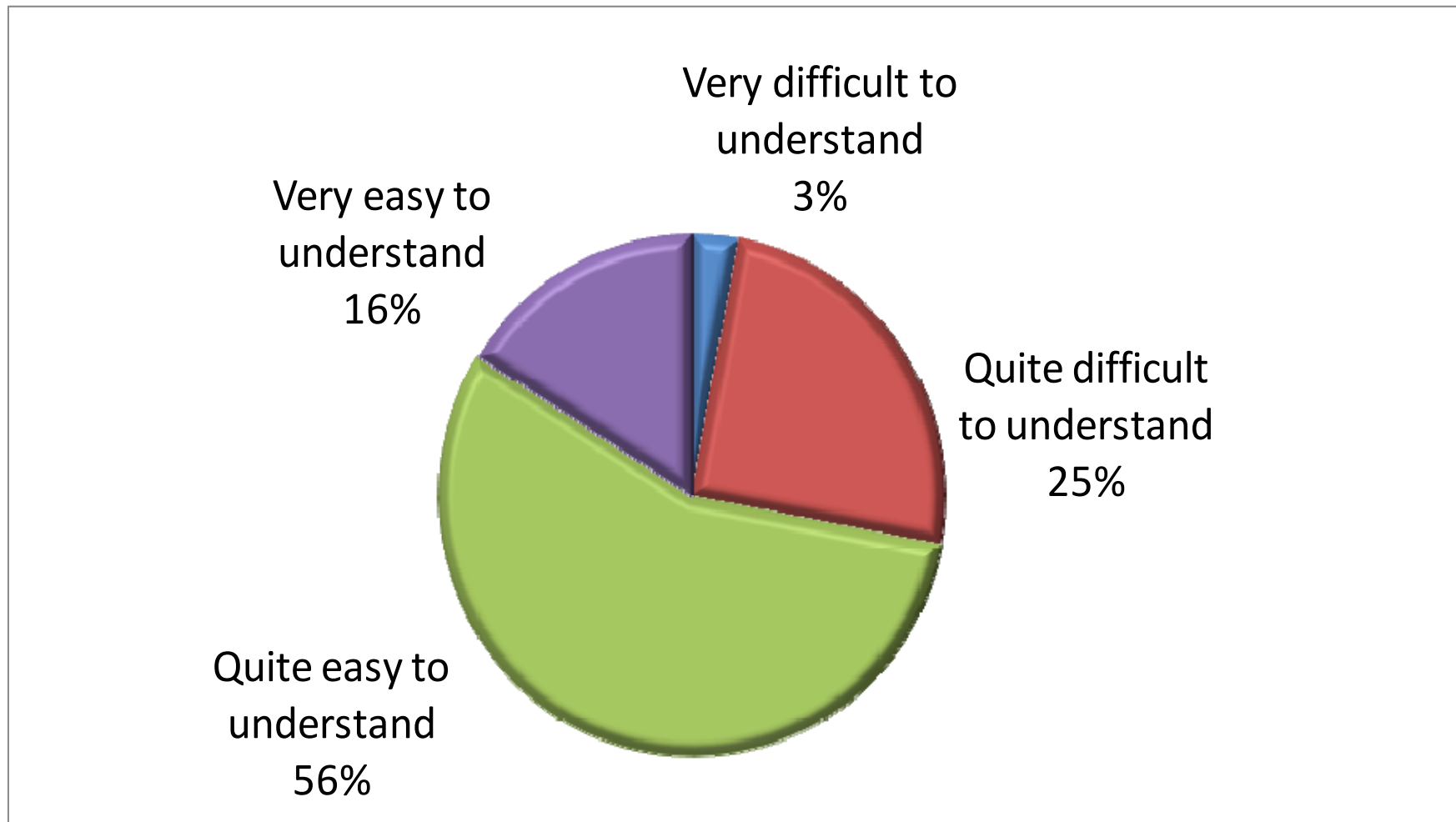
What I will talk about today...

- How often do consumers refer to food labels?
- How easy are labels to understand?
- Do they inform or confuse?
- What is the view on reformulation?
- To what extent do consumers check labels across different categories?
- Why do they not check on BCCC categories?
- What do they look for on BCCC categories?

How often do consumers refer to food labels?



How easy are food labels to understand?



Does labelling ...

inform



or

confuse?



Package labelling has drastically improved over the years (eg. gda, traffic lights etc.).

Male, 31, Quite Positive

I do appreciate the amount of labelling, especially indicating the presence or absence of artificial additives.

Female, 40, Uncertain

Generally they do a very good job of trying to be as transparent as possible about the source of food and nutritional content.

Male, 21, Quite Positive

On the whole the labelling is informative enough and food is usually perfectly safe - they slip up from time to time but usually all is OK.

Female, 66, Quite Positive

They are suitably regulated to provide food of a certain standard and provide the nutritional information so that individuals can know and have a balanced diet.

Male, 32, Very positive

They are telling us what everything contains so we can make choices.

Female, 24, Quite Positive

No standard on labelling re nutrients/calories. Traffic lights seem to be different for each manufacturer.

Male, 52, Quite Negative

I feel like most food manufacturers are trying to mystify rather than inform. I want numbers, not green lights and red lights.

Female, 68, Uncertain

They do not always give full information about ingredients, they do not always tell you if a recipe/ingredients have changed.

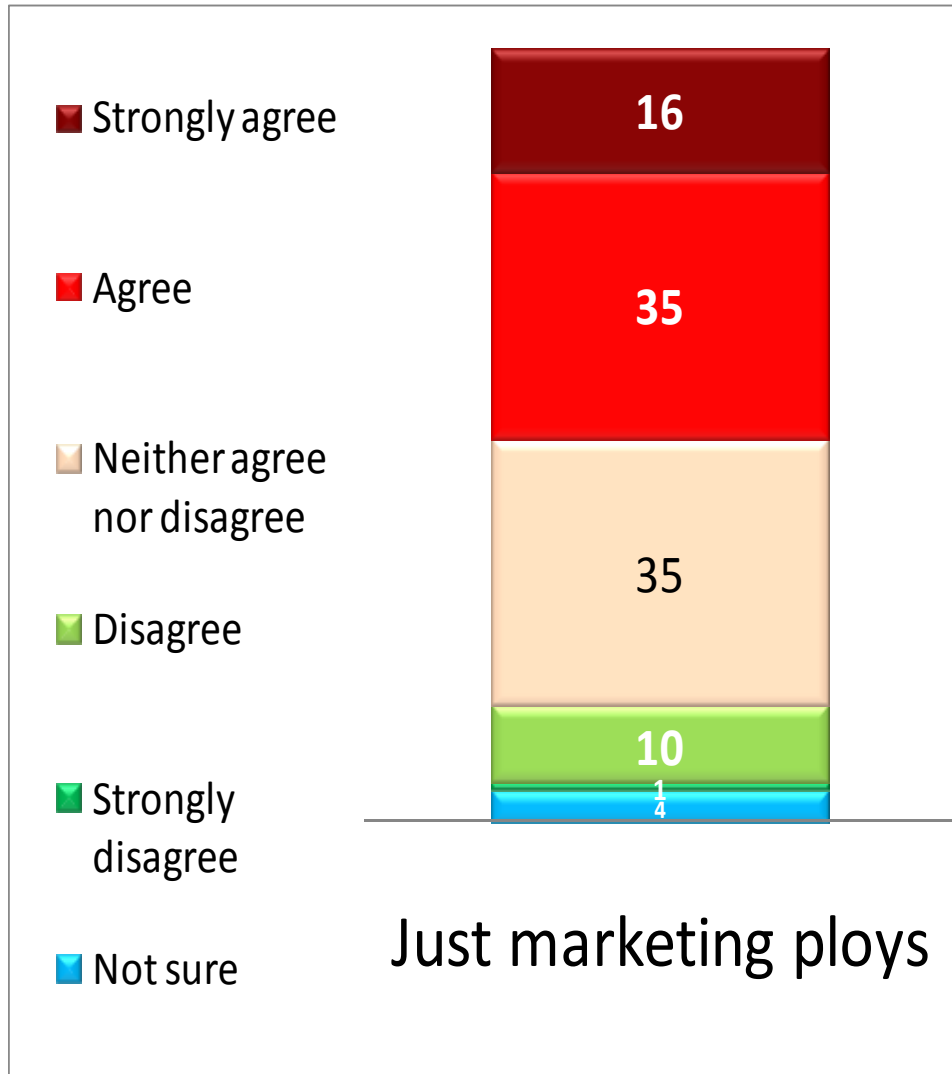
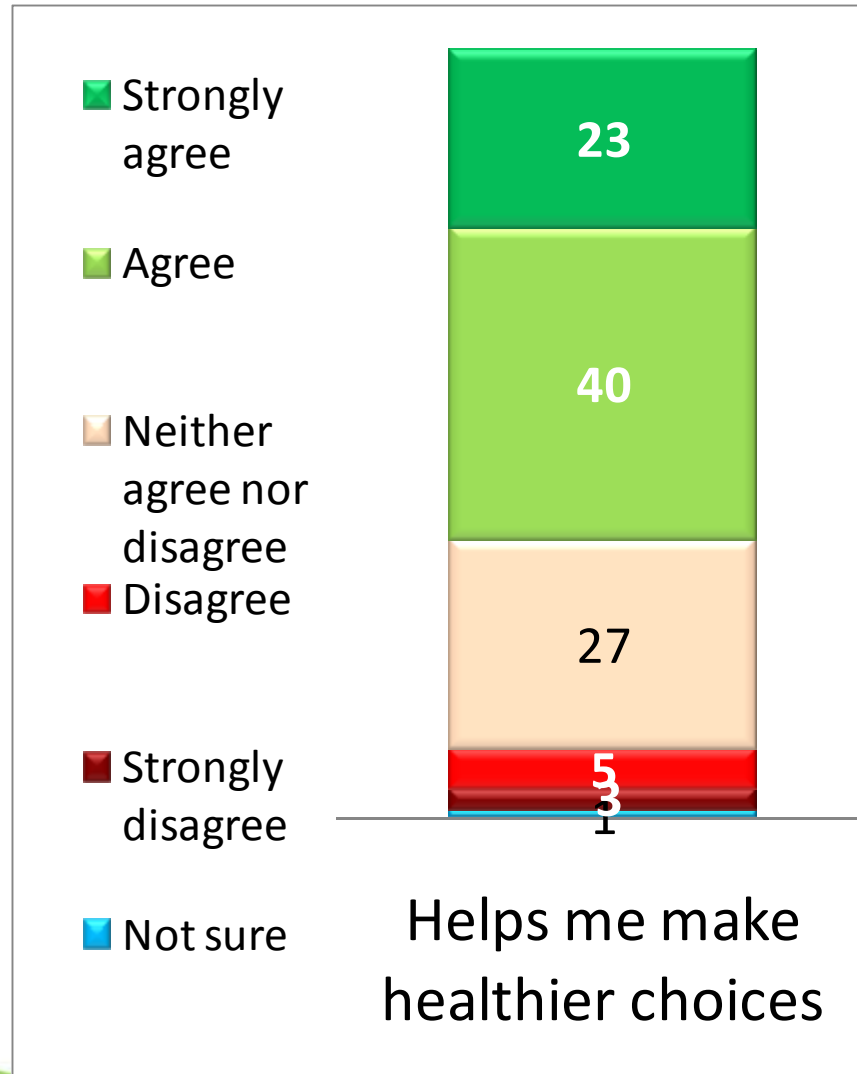
Female, 59, Uncertain

Low fat items are high in sugar and vice versa - quite deceptive.

Male, 52, Quite Negative.

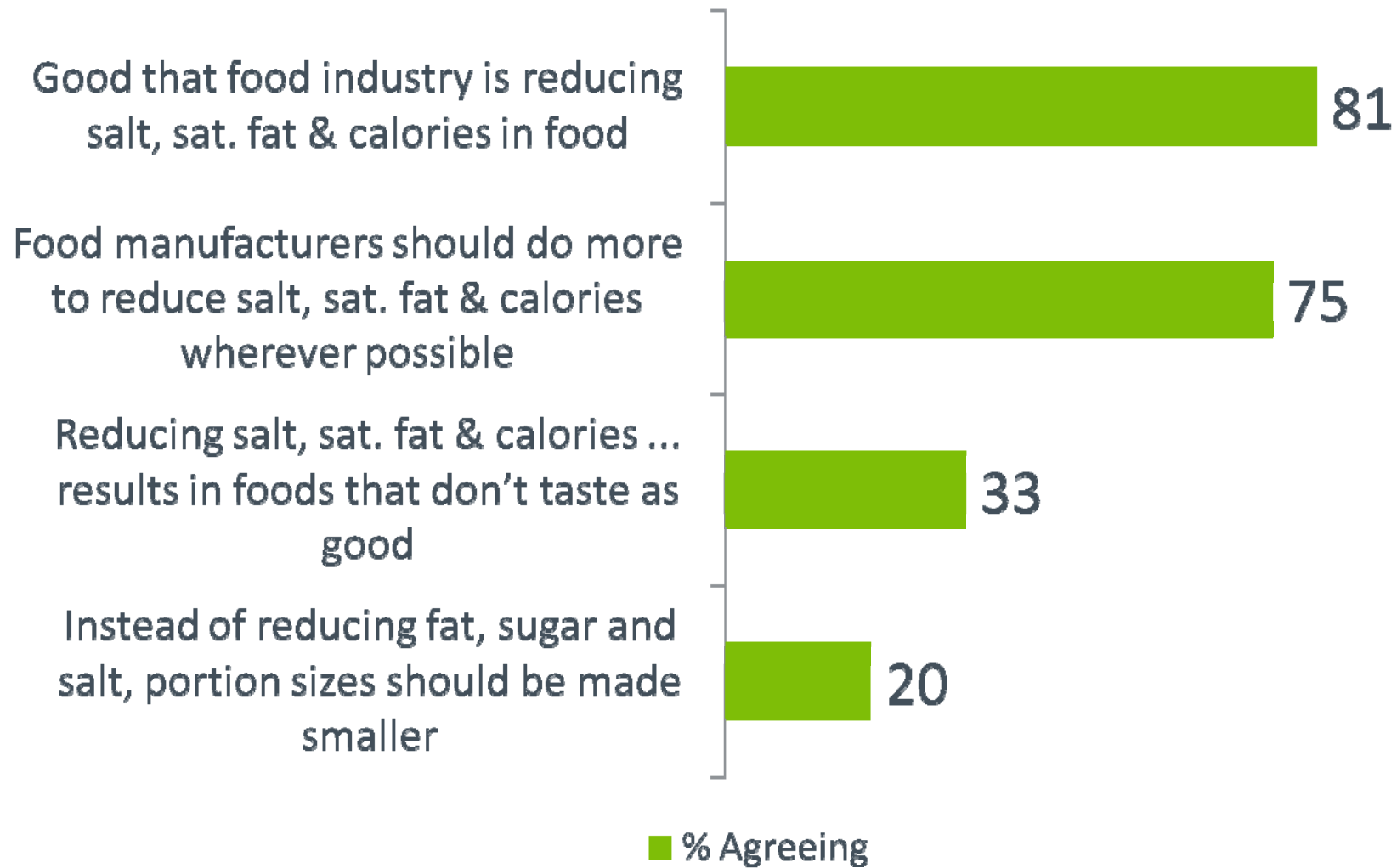


Views on product reformulation messages ...



Q1010: Many food companies have recently been changing their recipes to reduce amounts of salt, saturated fat and calories in their products. Please indicate your level of agreement with the following statements in relation to product reformulation.

Level of agreement on other statements...



Views on Reformulation

More has to be done to help reduce fat and sugar in the overweight people of not only the UK but the world. We have become a world of fat and unhealthy people.
Male, 54, Quite Negative

They are not reducing fat and salt content fast enough.
Male, 33, Uncertain

The amount of saturated fats and artificial additives has reduced. There is still a way to go but we are making progress.
Male, 41, Quite Positive

I think that they are trying to improve things by reducing saturated fat, salt etc..
Male, 66, Quite Positive

How many consumers check labels across different categories?



69%



67%



67%



61%



59%



58%



58%



57%



54%



52%



52%



49%

And how many read thoroughly?



18%



17%



15%



20%



14%



15%



12%



12%



12%



12%



10%



9%

Why labelling is not checked or read



To be honest, I can't really be bothered	47	47	44	43
A treat so nutritional content matters less	31	33	46	38
Rough idea of what is in this type of food	36	33	37	32
I don't check or read the labels on any foods	22	25	20	21
I do not have time	14	15	12	11
I don't believe the labelling is accurate	7	8	8	6
Labelling is not very easy to understand	7	8	7	7
The labelling has too much information	7	7	6	7

What information are consumers looking for?

Organic ingredients (11%)

Gluten free ingredients (7%)

Storage instructions (19%)

Traffic lights (20%)

Country of origin/where made (21%)

Calorie content (42%)

Use-by date (54%)

Saturated

Allergy warnings (18%)

fat content (39%)

Ingredients (37%)

Fat content (43%)

Artificial Sweeteners (22%)

Sodium/salt content (25%)

Sugar content (43%)

GDA (Guideline Daily Amounts) (19%)

Carbohydrate content (18%)

Suitable for vegans (6%)

Suitable for vegetarians (10%)





General views - In summary...

- Almost 1/3 of consumers regularly refer to food labels on products not previously purchased
- 16% believe labels are very easy to understand – 56% say they are quite easy to understand
- Many believe information is informative
- Recognition of improvements in recent years
- An appreciation that regulations are in place to protect consumers
- Some concern about lack of consistency
- Mixed views on reformulation messages
 - 63% agree they help make healthier choices
 - 51% agree they are just marketing ploys
- Recognition that progress being made but belief that more needs to be done



Category views - In summary...

- People more likely to check labels on
 - Dairy, breakfast cereals and tinned foods
- People less likely to check labels on
 - Cakes, pizzas, chocolate and confectionery
- Most thoroughly checked category is ready meals
- Least thoroughly checked category is confectionery



BCCC views - In summary...

- Why don't they check BCCC categories?
 - Almost half just couldn't be bothered
 - Less concerned when it is a 'treat' category
 - Few barriers relate to issues with labelling
- Important info is:
 - Use by, fat content, sugar, calories
- Important to less is
 - Info relating to special dietary needs