FAST CHOICES: An evaluation of energy purchased and consumer information

Report: Findings from Waves 1, 2 & 3

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TABLE OF CONTENTS

Page

1. EXECUTIVE SUMMARY

1.1 Background and approach

On 1 February 2011, the NSW Government introduced legislation that requires standard food outlets to display nutritional information on menus at point of sale by 1 February 2012. Review of this legislation was also mandated. To inform the review, the NSW Food Authority and NSW Health developed an evaluation framework, which identified desirable outcomes of the legislation. This project aims **to measure and assess two key outcomes for the evaluation;**

- whether consumers have awareness and increased understanding of energy (particularly kJ values displayed in qualifying outlets), and
- whether consumers purchase fewer kJs from qualifying outlets and/or make different food choices with other meals.

In late 2011, the NSW Food Authority received funding to support the implementation of the Fast Choices legislation through an expanded communications campaign targeting the primary audience (18-24 year olds). Additional research was subsequently required **to measure the impact of the consumer campaign**, and specifically amongst this audience. This project aims **to provide a measure for another key outcome for the evaluation;**

- whether the consumer education program supports the regulation.

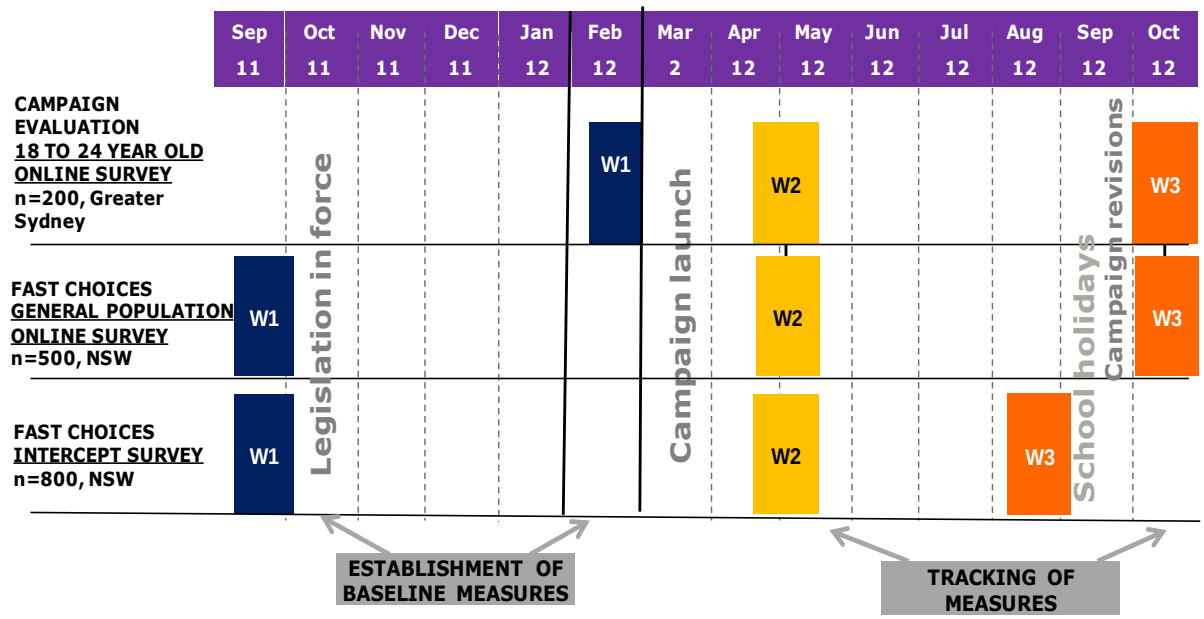
TNS Social Research (TNS) was commissioned to conduct research as part of the evaluation of the Fast Choices initiative, and focusing on evaluating the above. The following program of research was designed and subsequently undertaken:

- In July 2011 research commenced with a small scale **developmental qualitative** phase, to inform quantitative questionnaire design.
- In September 2011, prior to the appearance of menu labels in stores, the first two quantitative **baseline surveys** were conducted to facilitate measuring impact of the initiative. This comprised:
  - An online general population survey of approximately 500 NSW residents who had consumed food from at least one of the standard food outlets in the past month (providing a series of baseline measures in terms of awareness and understanding of nutritional labelling and average daily intake levels), and
  - A face-to-face intercept survey with over 800 participants at 14 selected standard food outlets in NSW, with surveys being administered after purchase and / or consumption (focusing in particular on consumption and awareness of menu labelling at the site, informing kJ consumption levels).

- In February 2012, when menu labels were introduced in stores but immediately prior to the launch of the consumer campaign in March 2012, a baseline measure was established for the primary target audience. This comprised an online survey amongst 18-24 year old Greater Sydney residents (n=200).
  - In April 2012, this was followed with a **tracking stage** of all three surveys i.e. the General Population Online Survey, the face to face Intercept Survey and the 18-24 year old Online Survey. This was in order to test any shift in awareness, understanding and/or behaviours since implementation of legislation and launch of the consumer campaign.
- In August 2012 the **final wave of tracking** was implemented for the face to face Intercept Survey, and in October 2012 the same was implemented for the General Population Online Survey as well as the 18-24 year old Online Survey. This was to establish whether any further shifts in awareness, understanding and/or behaviours had occurred, as legislation had by then been in place for a few months.

A summary of the methodology, sample and timing of all surveys is outlined below:

Figure 1.1: Research program timeline



1.2 Key findings

Below we summarise the key take-outs observed across Waves 1, 2 and 3 of the various surveys.

Sample	General Population Online Survey		
KEY FINDING	**Wave 1**	**Wave 2**	**Wave 3**
	%	**%**	**%**
Frequency of purchase (% purchase fast food at least once a week)	61	56	59
Awareness of daily intake value (% indicated 8700 kJs)	3	5	9↑
Notice of kJ info on menu (% who noticed kJ on menu)	46	49	52
Prompted recall of kJ info (% who recalled kJs)	54	79↑	75↑
Approval of initiative (% who said campaign is 'very' necessary)	n/a	38	49↑

Sample	18 to 24 year old Online Survey		
KEY FINDING	**Wave 1**	**Wave 2**	**Wave 3**
	%	**%**	**%**
Frequency of purchase (% purchase fast food at least once a week)	81	74	76
Awareness of daily intake value (% indicated 8700 kJs)	8	16↑	19↑
Notice of kJ info on menu (% who noticed kJ on menu)	59	65	63
Prompted recall of kJ info (% who recalled kJs)	77	76	74
Approval of initiative (% who said campaign is 'very' necessary)	n/a	46	53

Sample	Intercept Survey		
KEY FINDING	**Wave 1**	**Wave 2**	**Wave 3**
	%	**%**	**%**
Awareness of daily intake value (% indicated 8700 kJs)	1	9↑	8↑
Kjs purchased at outlet (Median)	3355	3192	2836↓
Notice of kJ info on menu (% who noticed kJ on menu)	15	40↑	36↑
Prompted recall of kJ info (% who recalled kJs)	28	80↑	81↑

Consumption patterns and habits

Consumption in fast food outlets is a regular activity for many NSW residents, with the majority of General Population Online Participants indicating that they consume such products once a week or more. Younger participants (i.e. 18 to 24 year old Online Participants) have a particularly high purchase rate, with over three-quarters visiting such outlets more than once a week. There were no significant changes across waves.

When making their decisions, consumers mostly refer to menus for prices and information on special offers. However, since its introduction, the kilojoule labelling is being increasingly used to inform their choices. Among the General Population Online Participants 15% used it in making their decisions in Wave 2 (carried out two months after the introduction of the legislation) while this figure significantly rose, to 24% in Wave 3, six months later. 18 to 24 year old Online Participants are consistently utilising kilojoule labelling when making their decisions, with just under a quarter stating so during all three waves of the survey (all of which occurred post legislation).

Salience of nutrient labelling in outlets

Consumers are more likely to notice nutritional information in fast food outlets since the introduction of the legislation.

The proportion noticing any such information in the intercept survey jumped significantly from 15% in Wave 1, to 36% in Wave 3. The General Population Online Survey and 18 to 24 year old Online Survey also showed a rise in consumers noticing nutritional information on menu boards, posters and information boards, and on take-away menus since the introduction of the legislation (i.e. up from 46% in Wave 1 to 53% in Wave 3 for the General Population Online Participants and up from 50% in Wave 1 to 63% in Wave 3 for 18 to 24 year old Online Participants).

Kilojoules have become the most salient nutrient information in fast food outlets; in the General Population Online Survey 75% of consumers noticed kilojoule information in Wave 3 compared with only 54% in Wave 1 – and representing a significant increase (in contrast, the relative salience of all other nutrient information has significantly reduced since the introduction of the legislation). Salience of kilojoules amongst 18 to 24 year old Online Participants has remained consistent, with around three-quarters mentioning it across all three Waves of the study.

Overall kilojoule consumption

There was a significant decrease in the median kilojoule content of items purchased between Waves 1 and 3 of the Intercept survey. The median kilojoule purchase in Wave 1 – carried out in September 2011, prior to the introduction of the Fast Choices legislation – was 3355kJs. In Wave 3 – carried out in August 2012, post Fast Choices legislation – the median kilojoule purchase significantly decreased to 2836kJs.

Estimating kilojoule content of items purchased

Overall, consumers found it difficult to estimate the kilojoule content of the items they had purchased. The majority of consumers were unable to make an estimate, but this proportion declined significantly and favourably during subsequent waves (i.e. down from 76% at Wave 1, to 66% at Waves 2 and 3).

Of those who made an estimate, the majority underestimated their kilojoule purchases by more than 10%. However, there were signs of improvements in consumers' estimates: while only 7% of the estimates in Wave 1 were within 10% of the actual kilojoule content of their purchase, this significantly increased to 13% in Wave 2 and to 14% in Wave 3.

Understanding of kilojoules

Just under half of the General Population Online Participants stated correctly that kilojoules refer to 'energy', with no significant changes observed across the three waves (W1, 48%; W2, 48%; W3, 47%). Of the remainder, around one in five did not to know; while around two in five offered erroneous responses or equated kilojoules with calories. Conversely, the majority of 18 to 24 year old Online Participants understood broadly that kilojoules refer to 'energy', with levels improving over time (W1, 69%; W2, 62%; W3, 71%) and around one in six did not know. So whilst consumer's awareness of kilojoules has increased significantly since the introduction of the legislation it appears that their understanding thereof has not.

Understanding and awareness of 'average daily food intake'

There was better understanding of the term 'average daily intake' with over half of participants – across both online surveys and all 3 waves – reporting it to be the 'average daily food intake'. There were also some positive indications of more detailed understanding of the term, with a significant rise of those referring to it as the 'healthy amount needed for the body' in the general population (W1, 3%; W2, 12%; W3, 7%).

There was progressive and significant improvement in awareness that 8700kJs is the average daily adult intake; the proportion estimating it to be between 8000-8999kJs significantly increased in all surveys, with precise estimates of 8700kJs significantly rising (i.e. from 3% in Wave 1 of the General Population Online Survey, to 9% in Wave 3; and from 8% in Wave 1 of the 18 to 24 year old Online Survey, to 19% in Wave 3, and from only 1% in Wave 1 of the intercept survey to 8% in Wave 3).

Support for menu labelling and perceived impact

When informed of the Fast Choices legislation, participants' verbatim comments indicated a general acceptance of the initiative; with the vast majority (over 75% across all surveys and waves) not expressing any objections.

The communications campaign

Following the commencement of the main consumer education campaign, a positive level of spontaneous awareness was attained among its target audience of 18-24 year olds, and regarding various mentions of kilojoules. These were attributed to advertising locations of fast food/ drink outlets (W2, 32%; W3 30%), shopping centres/ food courts (W2, 20%; W3, 19%), on websites or internet advertising (W2, 8%; W3 9% and W2, 6%; W3, 9% respectively) and on the radio (W2, 8%; W3, 6%).

On prompting, 18 to 24 year old Online Participants most often recalled the poster ads (W2, 23%; W3, 31%), followed by the search engine ads (W2, 13%; W3, 16%) and the radio ads (W2, 13%). The functional elements of the campaign were more likely to be seen than used at this stage (i.e. the Facebook ads, the website and the Facebook page).

Overall the campaign was perceived as 'informative', 'necessary', 'believable' and 'relevant' by this targeted audience group. This is indicative that the campaign was correctly designed and positioned to meet its target audience. And, although not targeting the general population as such, the same broad reactions were recorded by the General Population Online Participants and it was seen as increasingly 'very necessary' (W2, 38%; W3 49%- a significant increase), and achieved some cut through, especially in response to the poster ads (W2 & W3 9%), and search engine ads (W2, 3%; W3, 10%- a significant increase).

1.3 Conclusions

The evidence indicates that the Fast Choices initiative has had a significant impact on consumers' choices in Fast Food outlets over the period studies; kilojoule labelling is increasingly being used to aid decisions, and a decrease in median kilojoule purchases was observed.

Nevertheless, consumers' understanding of the term kilojoules is still mixed. Under half of the General Population Online Participants demonstrated a broad comprehension of the term, while the remainder either did not know, or were erroneous in their understanding. The primary target audience of the communications campaign, and the group with most frequent fast food consumption (18 to 24 year old Online Participants) demonstrated higher levels of comprehension of kilojoules than the population as a whole. However, since the introduction of the legislation, there has been no significant improvement in consumers' understanding of kilojoules.

The Fast Choices initiative is providing additional assistance to consumers when making their choices in fast food outlets. However, the evidence also signals that further public education – particularly, but not exclusively, targeted towards the general population – is needed, in order to further empower consumers to effectively use the kilojoule labelling.

2. BACKGROUND AND APPROACH

On 1 February 2011, the NSW Government introduced legislation that required standard food outlets to display nutritional information on menus at point of sale. The new laws came into effect from 1 February 2011, allowing business twelve months to comply before penalties come into force. The initiative is part of the NSW Government's broad set of responses to assist in reducing the rates of overweight and obesity in the community. The laws mandate the display of average energy content for standard menu items of unpackaged ready-to-eat food sold at qualifying food outlets, as labelled on menus in-store, on drive-thru menus, on internet ordering websites, and distributed by mail. The laws affect those outlets selling standard food items with twenty or more locations in NSW and 50 or more locations nationally.

2.1 Research purpose and objectives

The legislation mandated for a review of the new laws which is to be partly informed by the Fast Choices (menu labelling) evaluation. The evaluation, administered through the NSW Food Authority, serves to provide evidence on consumer awareness, understanding and use, and the effect menu labelling has on nutrients purchased. In all, seven outcomes have been identified for evaluation purposes, as detailed in the table below:

Intermediate outcomes of specific relevance to the regulatory intervention:

1. Businesses understand the regulatory requirement
2. Businesses comply with the regulation
3. Regulatory agencies manage and enforce the regulation
4. NSW Food Authority implements a consumer education program
5. Consumers have information to make healthier choices at fast food and snack food chains
6. Consumers have awareness and increased understanding of energy (particularly kJ values displayed in qualifying outlets), and
7. Consumers purchase fewer kJs from qualifying outlets and/or make different food choices with other meals.

In order to assess these outcomes, a series of activities were being implemented, some of which are ongoing including on-site inspections, laboratory analysis, and qualitative and quantitative data collection and analysis. This includes the commissioning of TNS Social Research (TNS) to undertake quantitative benchmarking and tracking via consumer surveys, with measures specifically focused on intermediate evaluation outcomes 6 and 7:

Intermediate outcome 6: Consumers have awareness and increased understanding of energy (particularly kJ values displayed in qualifying outlets). Assessment of this outcome is to determine:

- whether the legislative requirements and supporting activities have increased consumer awareness and understanding of energy in respect to food, and
- whether consumers noticed and report taking account of the kJ information displayed at outlets.

The assessment of this outcome will be complete through the collection of the following types of data before and after implementation:

- customer understanding of energy and kilojoules in food,
- customer understanding of energy and kilojoules for the type of menu items that will be required to display the nutrition information,
- customer attitudes, beliefs and diet motivations regarding energy and kilojoules, fats and salts,
- whether customers sought out or required other material for further information.

And, after implementation of new menus, additional data to be collected will include:

- whether customers noticed the kilojoules labelling for menu items purchased prior to purchase
- to what extent customers understood what the value meant
- to what extent the labelling of standard menu items influenced their choice of menu item
- to what extent have customer attitudes, beliefs and diet motivations regarding energy and kilojoules, fats and salts changed since the introduction of food labelling
- to what extent the information influenced their eating patterns for the rest of the day
- to what extent the information would influence future purchases at the outlet

Intermediate outcome 7: Consumers purchase fewer kJs from qualifying outlets and/or make different food choices with other meals.

This information will be used to calculate the average number of kilojoules, grams of fat, saturated fat, sugar and salt per customer transaction before and after implementation of the new menus.

Communications campaign

In late 2011, the NSW Food Authority secured further funding to support the implementation of the Fast Choices legislation through an expanded communications campaign involving digital resources, community engagement activity and paid media.
Fast Choices campaign seeks to inform NSW consumers about the new legislated food labelling requirement to display kJ information on quick service restaurant menus, enabling them to understand this information and put it into context for themselves and their families, empowering healthy, balanced and informed food choices.

The campaign was targeted at the heaviest consumers of fast and snack foods, namely 18-24 year olds with a slight male skew. This audience accounts for around 68% of the 883,000 NSW consumers who eat fast and snack foods frequently (i.e. 10 times per month or more). Campaign placement was concentrated in Sydney metropolitan areas with selected regional activity.

During the launch phase, March-April 2012, a mix of advertising, digital resources and engagement activities was used. Similar activities (excluding radio advertising) were repeated in September 2012.

Advertising was placed in food court illuminated displays 'Shopalites' and tabletops, selected radio outlets reaching the primary target audience and selected non-English speaking stations, search marketing, Facebook and mobile phone advertising. Other bursts of campaign activity included community engagement events in June and September 2012, and a fresh round of paid advertising in September-October 2012. Social media activity has been maintained since the launch of the communications campaign

Resources included a website (8700.com.au) containing information on kJ, a smartphone app, a Facebook page, and a searchable, interpretive fast food database. Community engagement activity generated 260 articles and 34 million impressions between March and June and 31 media articles and 22 million impressions during September-October 2012. The objectives of the campaign have been follows:

Consumer campaign objectives:

- To build awareness that menu displays show energy in terms of kilojoules
- To build awareness of the average adult daily intake of 8,700 kilojoules
- To build awareness of individual kilojoule requirements to maintain a balance of energy and activity, maintain a healthy weight, and how the requirements can vary depending on age, activity and other factors
- To provide a path for deeper engagement with campaign messages through access to more information using website, mobile site, mobile app, Facebook page and app. This will include information about how many kilojoules consumers require each day and to support balanced choices

2.2 Methodology

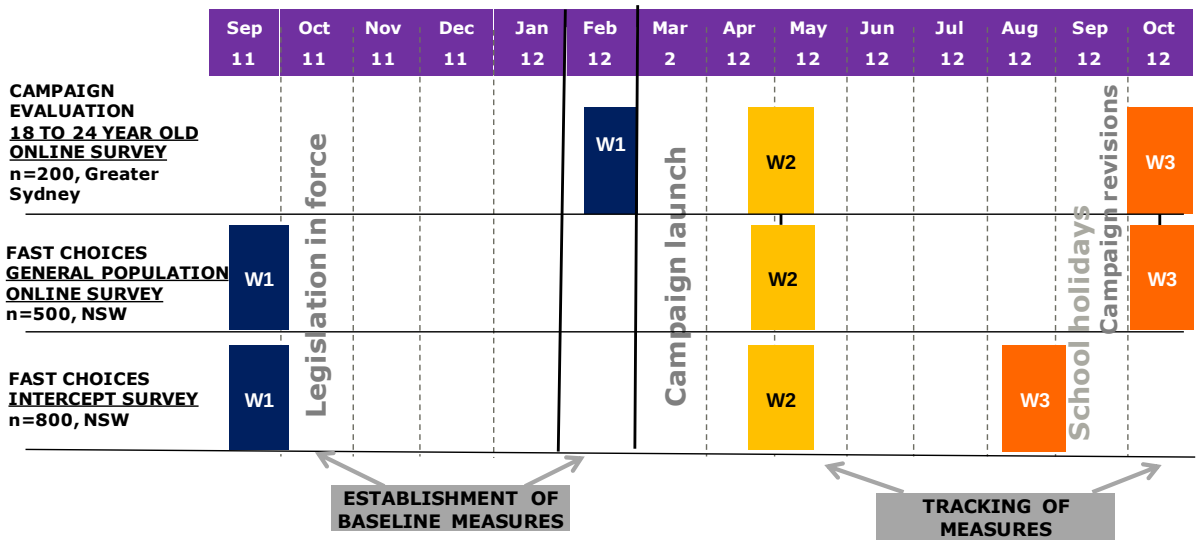
TNS, in collaboration with the NSW Food Authority, developed **a multi-method approach**. The research commenced with a small-scale developmental qualitative component to shape quantitative measurement. The first round of quantitative research conducted by TNS was instigated prior to the new menu labelling legislation becoming mandatory, thereby providing benchmark data from which to measure the impact and outcomes of the new laws. This was followed by two tracking stages to gauge any shifts in awareness, attitudes and behaviours, both immediately post implementation and again a few months after implementation.

In addition, a targeted pre- and post measure was introduced to gauge reaction to the consumer campaign (as outlined earlier). Although the target audience for the campaign encompasses all NSW consumers who purchase food from applicable outlets, the primary audience has been identified as those aged 18-24 years, and an additional component was introduced to assess the effectiveness of the campaign on young people specifically (whilst gaining impressions only from the broader NSW population).

In summary, the benchmark and tracker surveys comprised (and are referred to as):

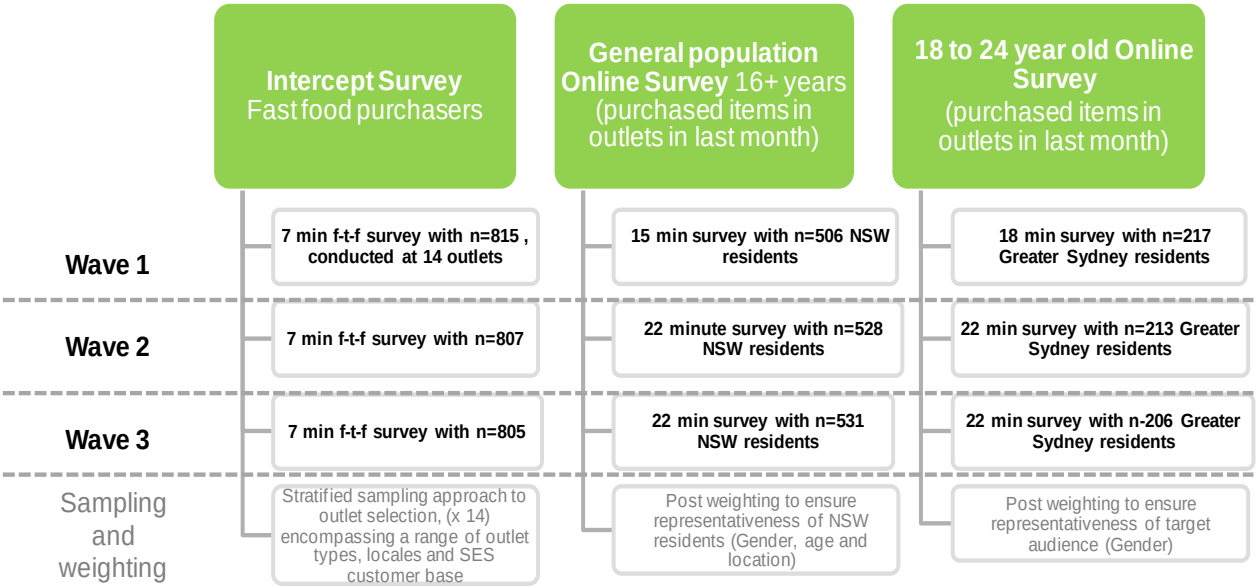
a) face-to-face intercepts at standard food outlets located in NSW (***Intercept Survey***),
b) general population online surveys from NSW (***General Population Online Survey***), and
c) online surveys amongst the primary target audience of the consumer campaign, namely 18-24 year olds from the Greater Sydney region (***18 to 24 year old Online Survey***).

Figure 1.1: Research program timeline



The following section summarises the approach adopted for each of the surveys.

Figure 1.2: Overview of approach



2.2.1 Qualitative developmental research

A small phase of qualitative research was conducted, principally to **inform development of quantitative survey tools**. This exercise consisted of **twelve face-to-face in depth interviews** facilitated by TNS researchers. Interviews were conducted with a range of NSW residents who had eaten food sourced from a fast or snack food outlet at least twice in the previous month. Engagement of participants was guided by a recruitment structure, ensuring a mix of people were consulted, on the basis of socioeconomic status, age, gender, location, body mass index, living arrangements, and cultural background.

Interviews lasted approximately one hour each. To assist in the conduct of interviews, an interview guide was developed by TNS in collaboration with the NSW Food Authority. This included question areas and prompts to explore consumer understanding of nutritional content, including energy and kilojoules, attitudes and beliefs towards consumption and nutritional content, attitudes towards fast food and drink consumption, and decision-making factors underpinning consumption.

2.2.2 Intercept surveys at standard food outlets (Waves 1-3)

Three Waves of face-to-face intercept surveys were conducted with customers at 14 outlets in NSW. The surveys lasted an average of seven minutes. A total of **n=815 participants** completed the survey during Wave 1 (7 September to 9 October 2011). **n=807 participants** completed it during Wave 2 (20 April to 18 May 2012) and **n=805**

participants completed it during Wave 3 (27 August to 23 September 2012 i.e. immediately prior to NSW School holidays).

The demographic profile of participants completing the survey is set out in Table 1 below. No post-survey weighting was applied to the intercept survey data due to the purposive sampling approach in place.

Table 1: Profile of Intercept Survey participants

Face-to-face intercept surveys		Wave 1 Unweighted %	Wave 2 Unweighted %	Wave 3 Unweighted %	NSW Population* %
Location	NSW Metro	71	72	71	63
	NSW Regional	23	25	24	37
Gender	Male	53	53	54	50
	Female	47	47	46	50
Age	16-25 years old	34	30	30	17
	26-45 years old	41	44	43	36
	46 years old and above	25	25	27	47

**ABS 2006 Census Data (Wave 1, 2 & 3 were all unweighted)*

As well as examining consumer awareness and understanding, the intercept surveys placed particular focus on consumption, providing the means to feed into the assessment of intermediate outcome 7 by recording participants' consumption at the outlet at the time of visit, and subsequently using this to establish kJ (and other nutrient levels) consumed.

The intercept surveys employed a targeted and specific approach, the frame of reference for participants being their experiences in one particular outlet at one particular point in time. While it is not necessarily a fully representative survey, a **stratified cluster sampling approach** was instigated to capture the broadest range of locations and encompass a spread of customer demographic and situational factors which may influence results. In particular, this approach took into account the need for a mix of outlet types, chains, metropolitan and regional locations, and areas with low, medium, and high socio-economic profiles. These sample points were revisited in Waves 2 and 3 of the survey to ensure valid and reliable comparison over time (Only 1 outlet needed to be replaced during Wave 3, as the outlet had become inaccessible since Waves 1 and 2. It was however, replaced with an outlet from the same chain and representing a similar equivalent demographic breakdown).

Within each outlet, trained interviewers were placed and recruited participants at random as they were leaving the site. Interviewers then administered the paper survey, with around 60 interviews being completed in each of the 14 sites.

Surveys were collated and the data entered, with a series of logic checks made, and quality control of 10% of surveys that were entered. A major activity at this stage included **coding of food and drink items consumed** to establish their relevant kJ, fat, sugar and sodium values. This was based on nutritional values for standard food items collated by the NSW Food Authority from the information available on the websites of the participating chains. In some cases, the nutritional content of items could not be established and participants for whom this was the case are excluded from calculations for average intake levels presented in this report.

2.2.3 General Population Online Surveys (Waves 1-3)

Three Waves of online survey were completed. **Wave 1 comprised n=506 NSW residents, Wave 2 comprised 528 NSW residents and Wave 3 comprised n=531 NSW residents.** Waves 1 and 2 ran concurrent with the aforementioned intercept surveys (i.e. 7 September to 9 October 2011 and 20 April to 18 May 2012 respectively) whereas Wave 3 ran from 15 October 2012 to 22 October 2012 (shortly after launch of the revised communication campaign).

The unweighted and weighted profile of those responding to the surveys is set out in Table 2 below.

Table 2: Profile of General population Online Survey Participants

General population NSW Online surveys		Wave 1 Unweighted %	Wave 2 Unweighted %	Wave 3 Unweighted %	NSW Population* Weighted %
Location	NSW Metro	63	54	52	63
	NSW Regional	37	46	48	37
Gender	Male	43	48	49	50
	Female	57	52	51	50
Age	16-25 years old	14	12	8	17
	26-45 years old	32	31	29	36
	46 years old and above	55	57	63	47

**ABS 2006 Census Data (All of Waves 1, 2 & 3 were weighted to these percentages)*

The surveys were used to obtain key measures related primarily to intermediate outcome 6. This included measures of fast food and drink purchase behaviour, awareness and understanding of nutritional information and their influence on purchase decisions, and feedback about the initiative and likely impact on future food choices. The

online surveys were used to establish a series of **overall 'population measures'** of consumer awareness and understanding, without the specificity of a particular experience at a particular point in time as measured in the corresponding intercept survey.

Wave 1 lasted approximately 15 minutes, whereas Waves 2 and 3 increased to 22 minutes, in order to incorporate pre-and post testing measures for the consumer communications campaign. Although not the primary aim of the surveys, or target audience of the campaign, it was considered of interest to gauge general population recall of, and response to, the campaign.

The surveys were administered using the *MyOpinions* panel. Invitations to participate were sent to a random sample of known NSW residents on the panel (fresh sample was utilised across Wave 1, 2 and 3), and screening questions implemented to ensure they were in scope and that responses were captured across the breadth of the population based on age, gender and location. Participants were 'screened out' from the survey if they had not **purchased food at least once from at least one standard food outlet in the past month**, if they were no longer resident in NSW, or if quotas were already attained on targets for gender, age and location.

Following completion of the surveys, data was **weighted to the NSW adult population** (using the same weighting process and weights across Wave 1, 2 and 3), ensuring establishment of a comparable survey population between Waves of the survey. Weighting was applied on age, gender, and location, using ABS Population Counts as target weights. Validation of unweighted and weighted data indicated there was negligible impact of weighting on survey data.

2.2.4 18 to 24 year old Online Surveys (Waves 1-3)

Three Waves of online survey were completed amongst the primary target audience of the consumer communications campaign, namely those aged 18-24 years. **Wave 1 comprised n=217 Greater Sydney residents, Wave 2 comprised 213 Greater Sydney residents and Wave 3 comprised n=206 Greater Sydney residents.** Wave 1 was conducted from 20 to 29 February 2012, one week immediately prior to launch of the campaign but at a point in time when menu labelling was in place at outlets. Wave 2 ran concurrent with Wave 2 of the aforementioned intercept and general population online surveys (i.e. 20 April to 18 May 2012) and Wave 3 ran concurrent with Wave 2 of the general population online survey, commencing on 16 October 2012 and closing on 25 October 2012

The unweighted and weighted profile of those responding to the survey is set out in Table 3 overleaf.

Table 3: Profile of 18-24 year old online survey participants

18 – 24 year old Greater Sydney online survey		Wave 1 Unweighted %	Wave 2 Unweighted %	Wave 3 Unweighted %	NSW Population* Weighted %
Location	NSW Metro	100	100	100	63
	NSW Regional	-	-	-	37
Gender	Male	43	36	38	50
	Female	57	64	62	50
Age	18-24 years old	100	100	100	17
	26-45 years old	-	-	-	36
	46 years old and above	-	-	-	47

**ABS 2006 Census Data (All of Waves 1, 2 & 3 were weighted to these percentages)*

The surveys were used to obtain pre- and post measures relating to the campaign. This included spontaneous and prompted awareness of campaign element, as well as reported impact on attitudes and future behaviour. Again, although not the primary focus of this study, it was considered of interest to include the measures for the general population survey in order to draw comparisons (i.e. consumer awareness and understanding, measures of fast food and drink purchase behaviour, awareness and understanding of nutritional information and their influence on purchase decisions, and feedback about the initiative and likely impact on future food choices).

Wave 1 lasted approximately 18 minutes (and included only spontaneous awareness), whereas Waves 2 and 3 increased to 22 minutes (and included both spontaneous and prompted awareness).

The survey was administered using the *MyOpinions* panel. Invitations to participate were sent to a random sample of known Greater Sydney residents on the panel (fresh sample was utilised across Waves 1, 2 and 3), and screening questions implemented to ensure they were in scope and that responses were captured across the breadth of the population based on age, gender and location. Participants were 'screened out' from the survey if they had not **purchased food at least once from at least one standard food outlet in the past month**, if they were no longer resident in Greater Sydney, or if quotas were already attained on targets for gender, age and location.

Following completion of the survey, data was **weighted** (using the same weighting process and weights across Wave1 1, 2 and 3), ensuring establishment of a comparable survey population between Waves of the survey. Weighting was applied only on gender, using ABS Population Counts as target weights. Validation of unweighted and weighted data indicated there was negligible impact of weighting on survey data.

A detailed account of the methodology employed for each research component, along with technical materials, is appended.

2.3 Interpreting this report

This report presents detailed results from the three survey elements outlined earlier – and focusses on differences between Waves, and to a lesser extent across surveys.

Results are presented in text and / or chart format. In some cases data in charts may not add up to 100%. This is a result of rounding of individual data items, or for some question types, where multiple responses were allowed.

Any variations that are statistically significant have been noted using pink directional arrows. Significance testing was tested at the 95% confidence level.

Significance testing involves testing whether a metric (a mean or a proportion) of the sample/ segment is significantly different from another sample/ segment in the previous wave. This involves specifying a confidence level (usually 95%) which means that 95% of the time the result will hold true, if the result is found to be statistically significant. The test uses the mean, standard deviation and sample sizes of the samples/ segments to compute a test statistic, which is compared against a standard value (determined by the confidence level specified). This comparison determines whether there is a significant difference between the 2 samples / waves at the specified confidence level.

Please note that these differences are calculated relative to the samples/ figures being compared; i.e. the differences between two samples/ figures are relative to their sample size and the standard deviation of the sample. TNS practice is to test statistical differences at the 95% confidence level (so we are 95% confident that there is a difference), which is in line with Australian and international market research standards.

Any statistically significant differences have been noted in the text as 'significant differences'.

Please note, the distribution of the Q1C data – for all three waves – was examined and found not to be modelled by the normal distribution[1]. This ruled out the use of parametric tests – such as the Student's t-test – to assess statistical differences between the means across waves. The, non-parametric, median test (k samples) was therefore employed to test significant differences between the medians for Q1C.

[1]Kolmogorov-Smirnov Normality Tests: Wave 1, Statistic = 0.665, Sig. = .000; Wave 2, Statistic = 0.64, Sig. = .000; Wave 3, Statistic = 0.89, Sig. = .000

3. MAIN FINDINGS

3.1 Current consumption patterns

3.1.1 Frequency and means of purchase

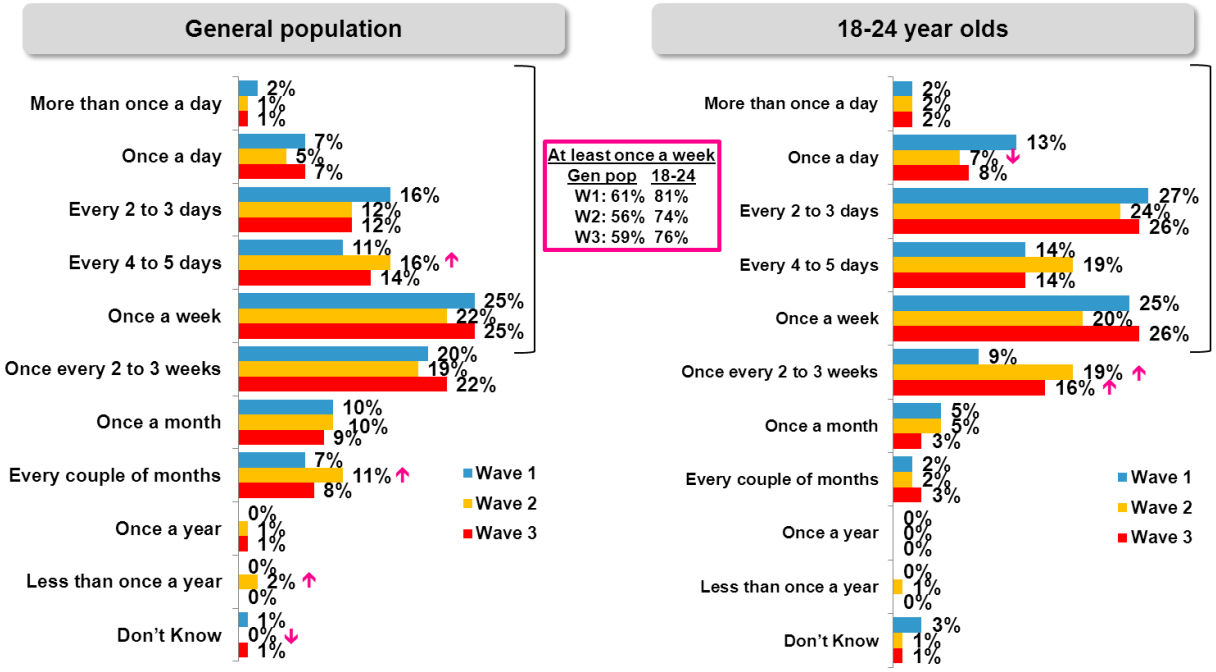
Across both online surveys, the majority of participants stated that they purchase items from fast food outlets at least once a week – although with higher proportions occurring amongst young people.

When looking across waves, the proportion of participants purchasing items weekly reduced slightly during Waves 2 and 3 (relative to Wave 1), but not significantly. Interestingly however, young people were significantly less likely to purchase items once a day and significantly more likely to purchase items once every 2 to 3 weeks.

Figure 3.1 below gives the detailed response breakdown across Waves 1, 2 and 3 of both the General Population Online Survey and the 18 to 24 year old Online Survey.

(Note: Percentages shown are based on weighted data, whereas base sizes quoted reflect unweighted figures. This principle has been applied throughout)

Figure 3.1: Frequency of purchase from standard food outlets (Online W1-W3)



Online A1. In general, approximately how often would you say you purchase items for yourself from fast food and drink outlets?
Base: (All respondents), W1 Gen. Pop. n=506; W2 Gen. Pop. n=528; W3 Gen. Pop. n=531; W1 18-24 yr. olds n=217; W2 18-24 yr. olds n=213; W3 18-24 yr. olds n=206

↑ / ↓ Significantly Higher / Lower than proportion at Wave 1 (95% ± confidence level)

3.1.2 Reasons for purchase

The convenience of fast food outlets is a highly significant factor in people's choice.

The majority of participants (in both the General Population Online Survey and the 18 to 24 year old Online Survey) mentioned this as a factor. Following this, familiarity and comfort, food taste & quality, treat or reward and value for money are all important factors in choosing to purchase fast food for both the general population and young people alike. Yet, while 18 to 24 year old Online Participants focus more on the tastes and flavours, as well as the perceived value for money, General Population Online Participants place greater emphasis on quality.

Results remained relatively consistent across Waves however, amongst 18 to 24 year old Online Participants there was a significant decline in mentions of 'price/ value for money' during Wave 3.

Below, Figure 3.2 gives the detailed breakdown of reasons for purchase.
(Note: Participants could select up to five responses and therefore the results do not add up to 100%)

Figure 3.2: Main reasons for purchasing from outlets (Online W1-3)

Convenience

	Gen pop			18-24yrs		
	W1	W2	W3	W1	W2	W3
It's convenient	**58%**	**57%**	**58%**	**60%**	**58%**	**62%**
Few other options	6%	5%	6%	6%	7%	7%
Fast food	1%	0%↓	0%↓	0%	0%	0%

Treat or reward

	Gen pop			18-24yrs		
	W1	W2	W3	W1	W2	W3
As a treat or reward	**25%**	**21%**	**23%**	**23%**	**28%**	**23%**
Helps when not feeling good	6%	5%	5%	11%	8%	11%
After high energy activity	2%	1%	2%	1%	4%	4%

Value for money

	Gen pop			18-24yrs		
	W1	W2	W3	W1	W2	W3
Price / value for money	**27%**	**32%**	**29%**	**37%**	**41%**	**27%↓**

Food taste & quality

	Gen pop			18-24yrs		
	W1	W2	W3	W1	W2	W3
For taste and flavours	**25%**	**22%**	**27%**	**33%**	**33%**	**34%**
It satisfies me	24%	25%	21%	36%	37%	39%
Quality of the food	16%	17%	18%	9%	9%	11%
For Family / friends / kids	14%	16%	12%	11%	9%	7%
For the healthy options	6%	5%	7%	7%	7%	6%

Familiarity & comfort

	Gen pop			18-24yrs		
	W1	W2	W3	W1	W2	W3
Know what I can get	**31%**	**31%**	**29%**	**34%**	**30%**	**28%**
Buy my regular choice	16%	13%	17%	17%	16%	19%
Where I always go	14%	10%↓	12%	10%	13%	13%
Get together with friends	1%	0%↓	0%↓	0%	0%	0%

Online A5. In general, what are the main reasons you purchase items for yourself from fast food and drink outlets? (5 possible)
Base: (All respondents), W1 Gen. Pop. n=506; W2 Gen. Pop. n=528; W3 Gen Pop n=531; W1 18-24 yr. olds n=217; W2 18-24 yr. olds n=213; W3 18-24 n=206

↑ / ↓ Significantly Higher / Lower than proportion at Wave 1 (95% ± confidence level)

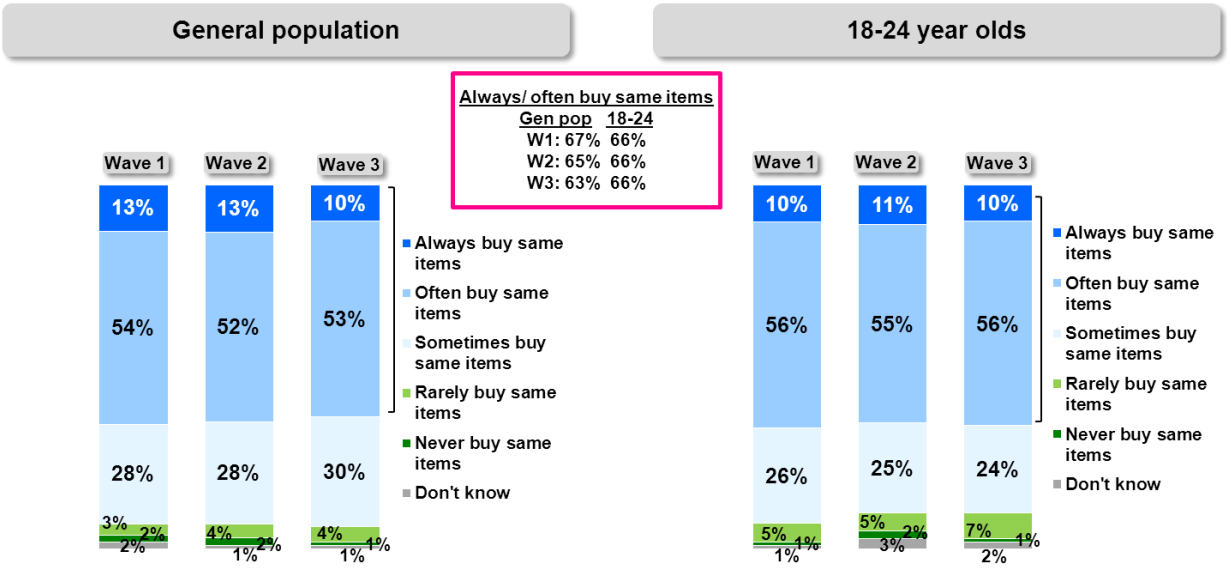
3.1.3 Variation in items purchased

Looking at how often participants vary their choice of items when in standard food outlets, just over two thirds often or always buy the same items. Only very few vary their choice of items in fast food and drink outlets.

Findings were very consistent across survey audiences (both the General Population Online Survey and the 18 to 24 year old Online Survey) and across all three Waves, indicating entrenched and habitual behaviours in this regard.

The proportions in detail are found in Figure 3.3.

Figure 3.3: Frequency of varying items purchased (Online W1-3)



Online A6. In general, how often do you vary the items you purchase for yourself from fast food and drink outlets?
Base: (All respondents), W1 Gen. Pop. n=506; W2 Gen. Pop. n=528; W3 Gen Pop n=531; W1 18-24 yr. olds n=217; W2 18-24 yr. olds n=213; 18-24 yr. olds n=206

↑ / ↓ Significantly Higher / Lower than proportion at Wave 1 (95% ± confidence level)

3.2 Understanding of kJ and other indicators

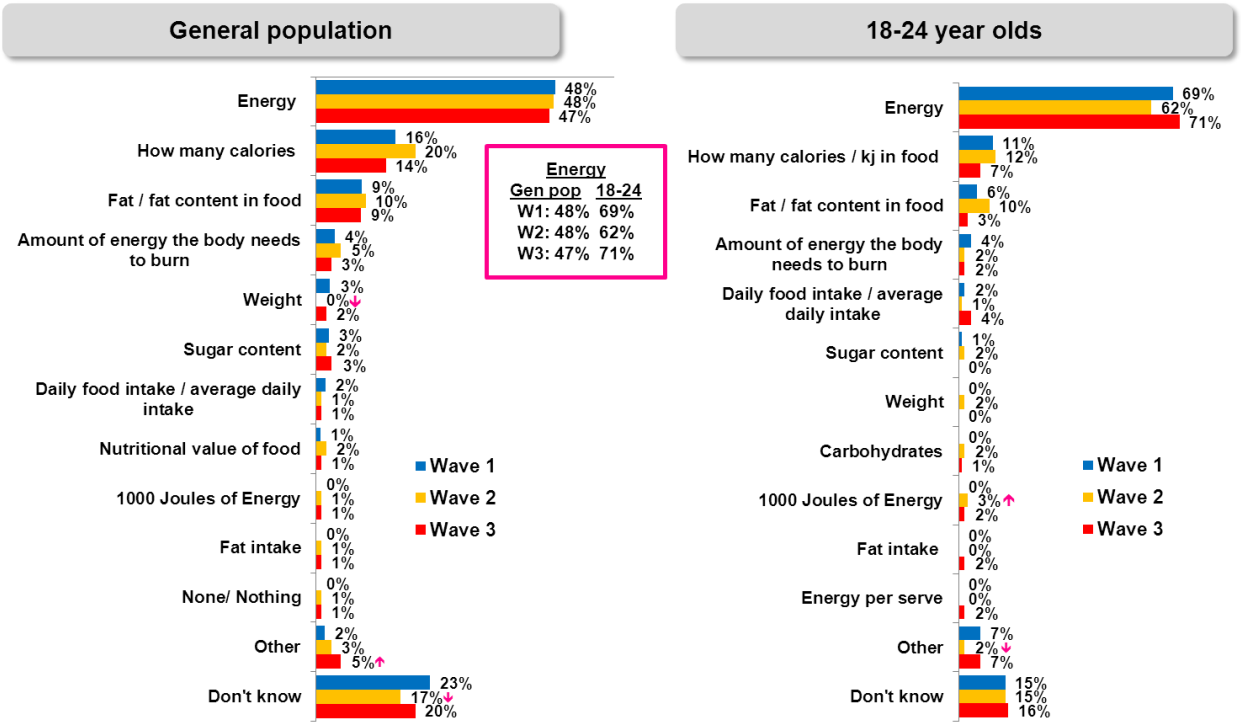
3.2.1 Unprompted understanding of kilojoules

'Energy value of food' remained the most commonly understood meaning of kilojoules.

Around half of the General Population Online Participants and almost two thirds of 18 to 24 year old Online Participants correctly and spontaneously stated that kilojoules are a measure of energy. Around a further fifth of the General Population Online Participants and a tenth of the 18 to 24 year old Online Participants refer to it as the calorie content of food and drinks.

Overall, 18 to 24 year old Online Participants were more likely to state an appropriate response than General Population Online Participants, but low levels of inappropriate association are still observed across both audiences.

Figure 3.4: Unprompted understanding of kilojoules (Online W1-3)



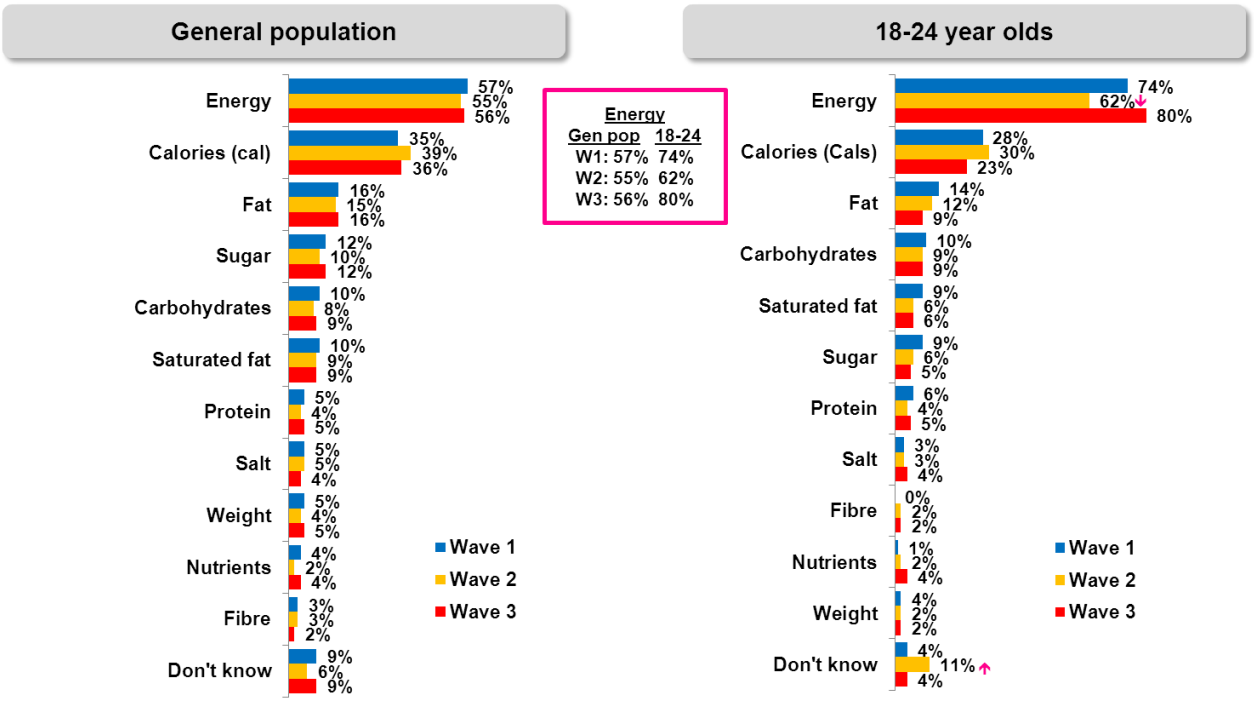
Online C1. What do you think the term kilojoules (kJ) refers to?
Base: (All respondents), W1 Gen. Pop. n=506; W2 Gen. Pop. n=528; W3 Gen Pop n=531; W1 18-24 yr. olds n=217; W2 18-24 yr. olds n=213; W3 18-24 yr. olds n=206
↑ / ↓ Significantly Higher / Lower than proportion at Wave 1 (95% ± confidence level)

3.2.2 Prompted understanding of kilojoules

On prompting, there were increased levels of those stating the preferred response that kilojoules measure energy.

There was limited change across waves amongst the General Population Online Participants, whereas there was a dip in mentions of 'Energy' amongst 18 to 24 year old Online Participants during Wave 2, together with a temporary increase in uncertainty (i.e. 'don't knows').

Figure 3.5: Prompted understanding of kilojoules (Online W1-3)



Online C2. What do you think kilojoules (kJ) measure?
Base: (All respondents). W1 Gen. Pop. n=506; W2 Gen. Pop. n=528; W3 Gen. Pop. n=531; W1 18-24 yr. olds n=217; W2 18-24 yr. olds n=213; W3 18-24 yr. olds n=206

↑ / ↓ Significantly Higher / Lower than proportion at Wave 1 (95% ± confidence level)

3.2.3 Reported confidence in knowledge of nutritional information

Participants were asked to rate their level of confidence regarding knowledge across a range of nutrients.

For Wave 1 General Population Online Participants confidence in knowledge of kJs ranked low, with only 45% claiming that they felt confident. The proportion feeling confident increased slightly, but not significantly, in Wave 2 before declining marginally in Wave 3. Slightly larger proportions were confident in their understanding of energy and calories with highest levels of confidence in relation to fat and sugar.

Among 18 to 24 year old Online Participants, reported knowledge levels for Wave 1 were similar to that expressed by the general population, although knowledge levels generally dropped off slightly during Wave 2, before increasing during Wave 3. Confidence levels regarding energy dropped off significantly during Wave 2, but recovered during Wave 3.

Figure 3.6: Reported confidence in knowledge of nutritional information (Online W1-W3)

% Nett very/ quite confident

General Population	Wave 1	Wave 2	Wave 3	18-24 years	Wave 1	Wave 2	Wave 3
Fat	58	61	57	Fat	56	47	47
Sugar	57	61	59	Sugar	55	46	49
Salt	51	53	52	Saturated fat	50	42	42
Nutrients	51	52	54	Energy	48	↓38	42
Energy	49	48	48	Salt	47	39	41
Calories (Cal)	48	52	50	Nutrients	46	42	46
Protein	48	48	47	Calories (Cal)	45	42	42
Carbohydrates	47	50	47	**Kilojoules (kJ)**	**45**	**41**	**45**
Fibre	47	50	47	Carbohydrates	42	35	42
Kilojoules (kJ)	**45**	**50**	**46**	Fibre	41	37	40
Saturated Fat	42	↑52	↑51	Protein	41	39	46

Online C5. Thinking about the contents of the food and drinks you consume in your everyday life, how confident are you in your knowledge of...
Base: (All participants), W1 Gen. Pop. n=506; W2 Gen. Pop. n=528; W3 Gen. Pop. n=531; W1 18-24 yr. olds n=217; W2 18-24 yr. olds n=213; W3 18-24 yr. olds n=206

3.2.4 Actual knowledge of kilojoules / energy

Participants' knowledge and understanding of kilojoules and energy was tested further using a series of true and false statements. However, a general lack of knowledge persisted and there still appears to be some confusion about what high kilojoule values mean.

In all three Waves of the General Population Online Survey, just over half stated correctly that kilojoules are not a measurement of fat and that food and drink with high numbers of kilojoules have high energy content. In both cases there was a slight, but not significant increase in correct answers from Wave 1 to Waves 2 and 3.

The 18 to 24 year old Online Participants more often stated the correct answers. However, from Wave 1 to Wave 2, fewer participants cited the correct answers in response to the statement "unused energy turns into fat", although this recovered and corrected itself again in Wave 3. Similarly, the statement "kilojoules are a measure of fat content" attracted significantly higher levels of don't know during Wave 2, but this uncertainty declined during Wave 3.

Figure 3.7: Actual knowledge of kilojoules / energy (Online W1-W3)

General population	TRUE			FALSE			DK		
	W1	W2	W3	W1	W2	W3	W1	W2	W3
Kilojoules are only in some foods and drinks	8%	7%	8%	71%	71%	71%	21%	22%	20%
Kilojoules are a measure of fat content	15%	15%	15%	53%	56%	56%	32%	29%	30%
Food and drink with high numbers of kilojoules have high energy content	55%	56%	58%	17%	15%	14%	28%	30%	28%
Unused energy turns into fat	69%	70%	71%	9%	7%	7%	22%	23%	22%
Consuming foods and drinks that are high in energy assists with weight loss	6%	4%	4%	73%	71%	72%	22%	25%	24%
18-24 year olds	**TRUE**			**FALSE**			**DK**		
	W1	W2	W3	W1	W2	W3	W1	W2	W3
Kilojoules are only in some foods and drinks	8%	6%	5%	77%	73%	79%	15%	21%	16%
Kilojoules are a measure of fat content	14%	11%	9%	63%	58%	68%	23%	32%↑	24%
Food and drink with high numbers of kilojoules have high energy content	70%	63%	68%	10%	11%	12%	21%	25%	20%
Unused energy turns into fat	79%	66%↓	74%	5%	17%↑	8%	17%	17%	18%
Consuming foods and drinks that are high in energy assists with weight loss	6%	7%	9%	72%	66%	66%	21%	27%	25%

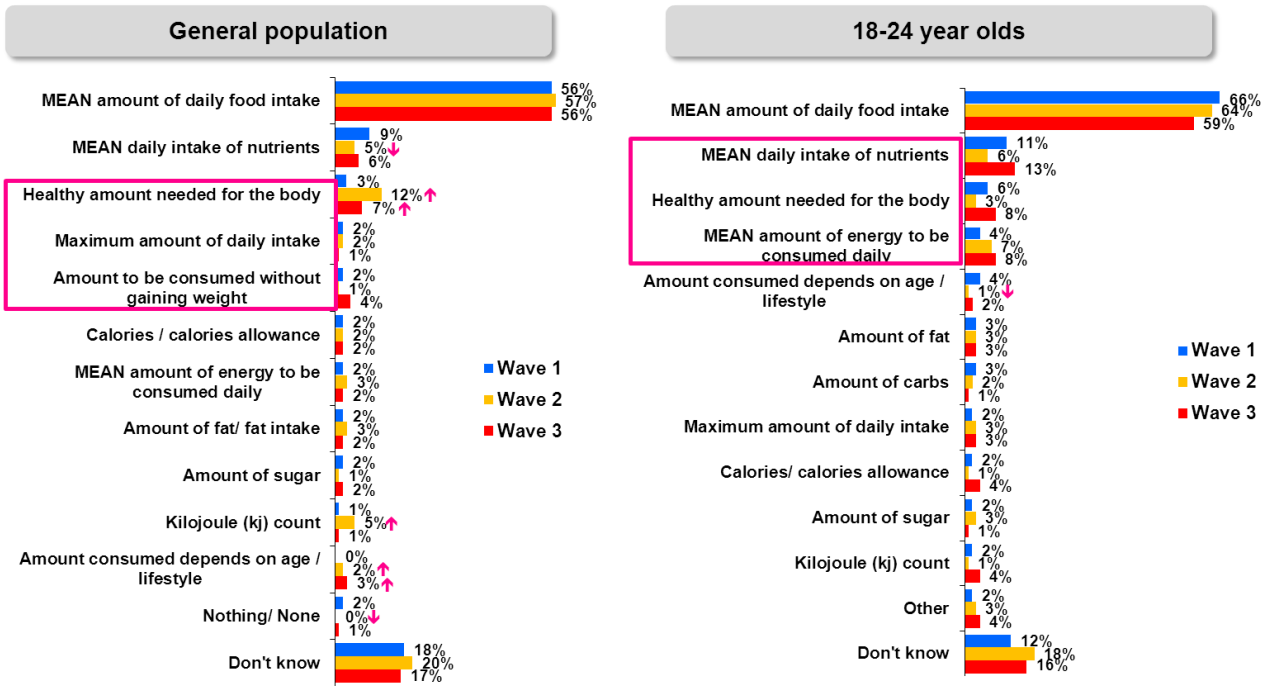
Online C8. Here are some statements about nutritional information. Please indicate whether they are true or false
Base: (All participants), W1 Gen pop n=506; W2 Gen pop n=528, W3 Gen Pop. n=531
Base: (All participants), W1 18-24 n=217; W2 18-24 n=213, W3 18-24 n=206

3.2.5 Understanding of 'average daily intake'

There appeared to be broad, but not unanimous, understanding of the term 'average daily intake'. Over half of the General Population Online Participants and around two-thirds of 18 to 24 year old Online Participants described it as 'the mean amount of daily food intake'.

Amongst the General Population Online Survey there was a significant increase between Waves 1, 2 and 3 in those stating that this refers to the "healthy amount for proper functioning of the body". Responses from 18 to 24 year old Online Participants remained largely consistent across Waves.

Figure 3.8: Understanding of 'average daily intake' (Online W1-W3)



Online C6. Thinking about the nutritional content of food and drinks, what do you think the phrase 'the average daily intake' refers to?
Base: (All respondents), W1 Gen. Pop. n=506; W2 Gen. Pop. n=528; W3 Gen Pop n=531; W1 18-24 yr. olds n=217; W2 18-24 yr. olds n=213; W3 18-24 yr. olds n=206

↑ / ↓ Significantly Higher / Lower than proportion at Wave 1 (95% ± confidence level)

3.2.6 Awareness of daily energy (kJ) intake levels

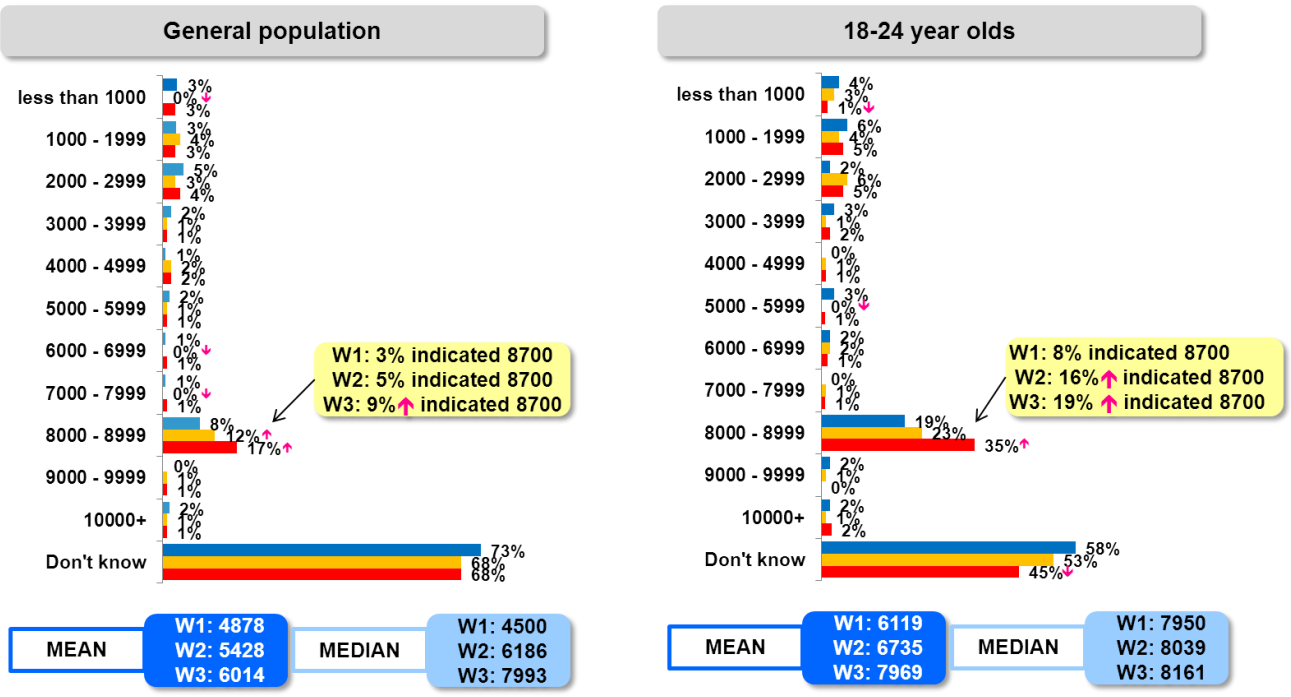
When asked to identify the average daily intake of kilojoules, there were strong indications that **knowledge levels have improved across Waves.**

At Wave 1, three-quarters of General Population Online Participants stated not knowing what the daily intake of kJs is. This figure subsequently declines slightly during Waves 2 and 3 (a positive shift). Amongst 18 to 24 year old Online Participants, levels of don't know commenced at 58% during Wave 1, but reduced significantly down to 45% during Wave 3 (another positive shift).

Of those who put forward a kJ figure, most under-estimated rather than over estimated, with a median response of 4,500 achieved at Wave 1 for the General Population Online Survey, and 6,119 for the 18-24 year old survey. These **figures do however, become increasingly accurate (and in line with the correct figure of 8700) during Waves 2 and 3**, with the median increasing to 7993 and 8161 respectively.

Also, the proportion of **those specifying the correct 'ballpark' of between 8000-8999 kJs increased significantly across both audiences** from Wave 1 to Wave 3. Even more encouragingly, the percentage of **those specifying the correct/ exact amount of 8700 kJs increased significantly amongst both audiences and from Wave 1 to Wave 3,**

Figure 3.9: Awareness of daily energy (kJ) intake levels (Online W1-3)



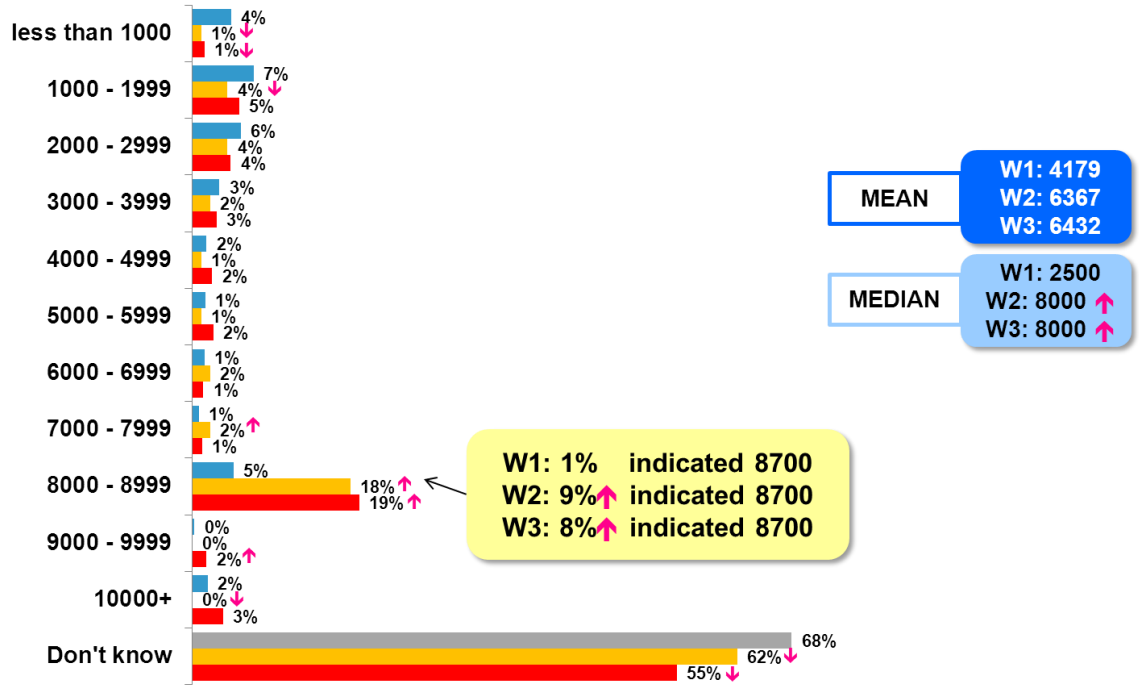
Online C7. What do you think the average daily intake of kJ is?
Base: (All respondents), W1 Gen. Pop. n=506; W2 Gen. Pop. n=528; W3 Gen Pop n=531; W1 18-24 yr. olds n=217; W2 18-24 yr. olds n=213; W3 18-24 yr. olds n=206

↑ / ↓ Significantly Higher / Lower than proportion at Wave 1 (95% ± confidence level)

A similar question was asked of Intercept Participants and an equally favourable outcome was noted. So when asked whilst in the outlet for the average adult daily intake, the majority were uncertain, whereas this proportion reduced significantly at both Waves 2 and 3.

Of those who put forward a response, the median was initially given as 2,500 at Wave 1 (notably lower than median responses given in the online survey), and a very low proportions estimated between 8000-8999kJs or quoted the correct figure of 8700kJs. **However, Waves 2 and 3 saw a significant improvement in accuracy**, with the means and medians increasing in line with the correct figure. Also the proportion correctly identifying the correct ballpark of 8000-8999kJs and the proportion correctly identifying the exact figure of 8700 kJ increased significantly.

Figure 3.10: Awareness of daily energy (kJ) intake levels (Intercept W1-W3)



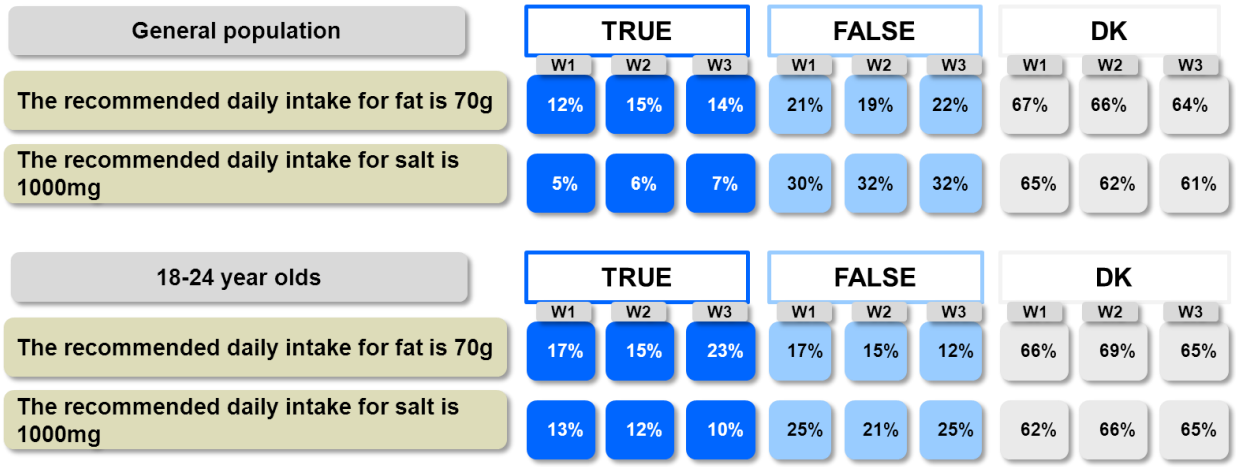
Intercept 6b. How many kilojoules do you think is the average adult daily energy intake?
Base: All respondents, W1 Intercept n=815; Wave 2 Intercept n=807; Wave 3 Intercept n=805

↑ / ↓ Significantly Higher / Lower than proportion at Wave 1 (95% ± confidence level)

3.2.7 Awareness of daily intake levels of fat and sodium

When questioned as to their awareness of average adult daily intakes of fat and salt, most were unsure. The majority were either incorrect or did not know, with little variance across Waves or across and across both audiences (General Population Online Participants and the 18 to 24 year old Online Participants).

Figure 3.11: Awareness of daily intake levels of fat and sodium (Online W1-W3)

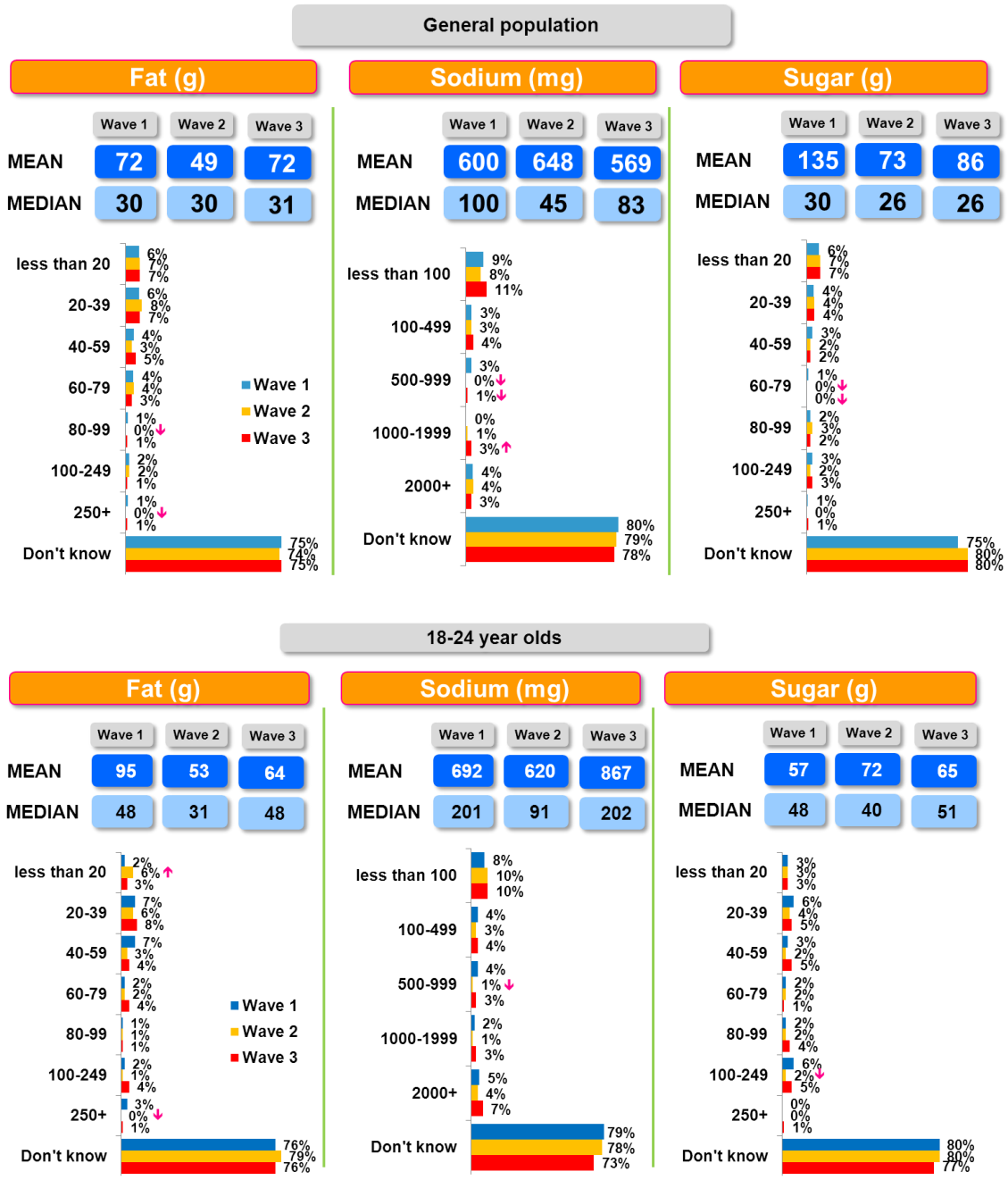


Online C8. Here are some statements about nutritional information. Please indicate whether they are true or false
Base: (All respondents), W1 Gen. Pop. n=506; W2 Gen. Pop. n=528; W3 Gen. Pop. n=531; W1 18-24 yr. olds n=217; W2 18-24 yr. olds n=213; W3 18-24 yr. olds n=206

↑ / ↓ Significantly Higher / Lower than proportion at Wave 1 (95% ± confidence level)

Similarly, when asked to specify what the average daily intake was for fat, sodium and sugar, the overwhelming majority said that they did not know, with few major shifts occurring between Wave 1 and 3 and across both audiences (General Population Online Participants and the 18 to 24 year old Online Participants).

Figure 3.12: Awareness of daily intake levels – fat, sodium and sugar (Online W1-W3)



QC7. What do you think the average daily intake of the following is?
Base: (All participants), W1 Gen pop n=506; W2 Gen pop n=528; W3 Gen pop. n=531 - W1 18-24 n=217; W2 18-24 n=213, W3 18-24 n=206

3.2.8 Average and median kJs purchased at outlet – Intercept only

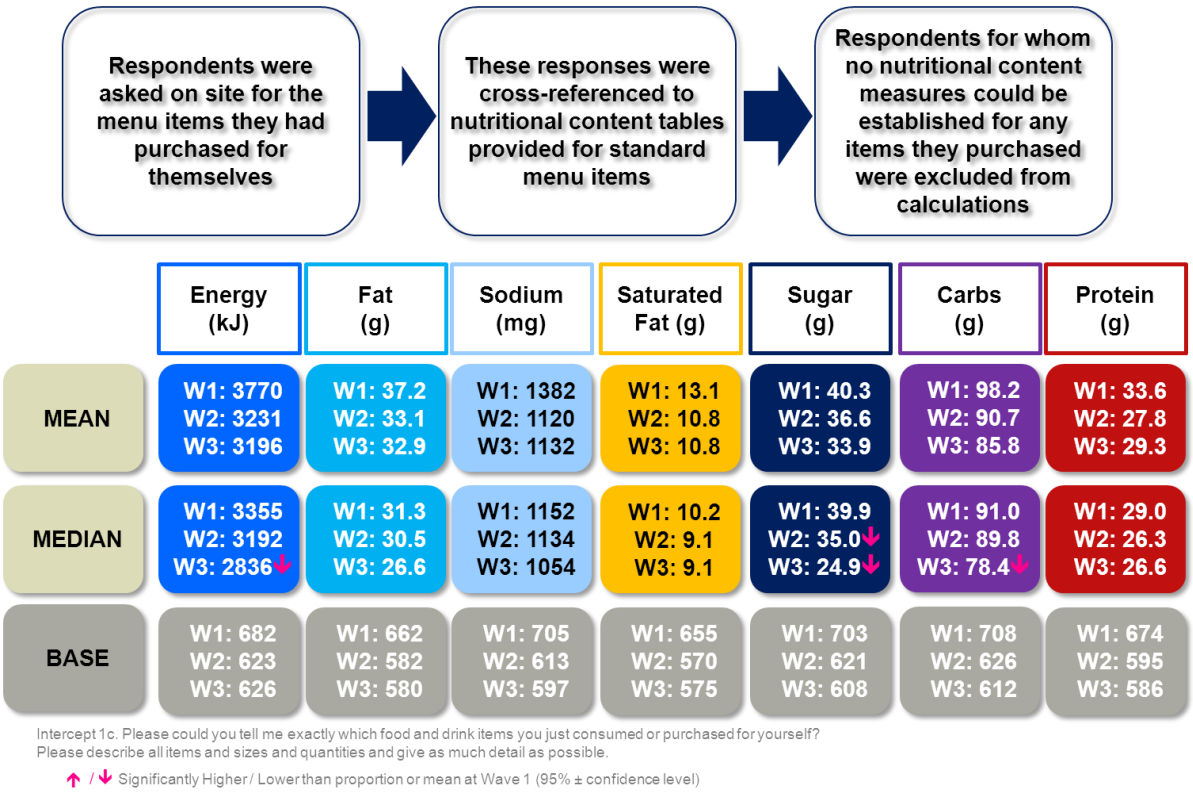
Figure 3.13 below sets out the data derived from Waves 1 to 3 of the Intercept Survey for the average and median Energy (kJ) content of fast food purchases, as well as these figures for a number of other nutrients.

The figures indicate a reduction in the mean and median of kJs purchased from Wave 1 to Wave 2, and again from Wave 2 to Wave 3 (as well as across almost all other nutrient indicators).

The mean kJ quantity purchased per person in Wave 1 was 3770kJ compared with 3231kJ for Wave 2 and 3196kJ for Wave 3. Similarly, **the median kJ purchased per person in Wave 1 was 3355kJ, compared to 3192kJ in Wave 2 and 2836kJ in Wave 3 – a significant decline relative to Wave 1.**

The values recorded ranged from 5 to 24,368 for Wave 1, from 2 to 18,455 for Wave 2 and from 9 to 15,960 in Wave 3.

Figure 3.13: Average kJs purchased at outlet (Intercept W1-W3)



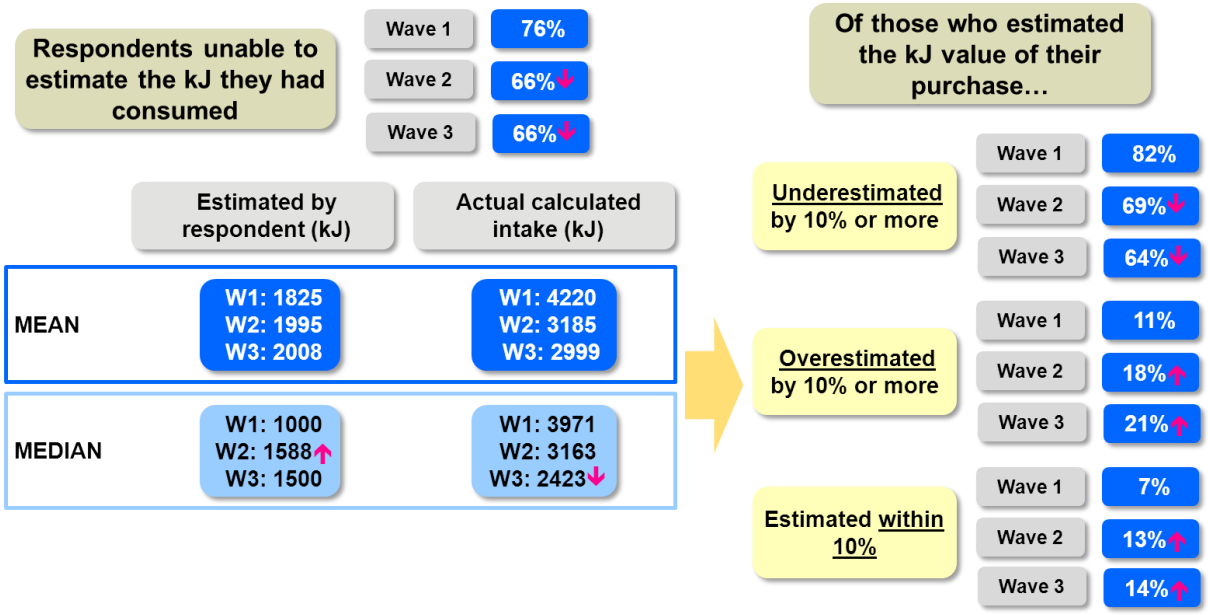
Figures are based on Wave 3 codeframes (each chain's nutrient information records as at September 2012) to provide a final set of fully comparable purchase figures.

3.2.9 Estimating the kilojoule content of items purchased – Intercept only

When asked to estimate the total kilojoules of the items participants had purchased for themselves there was initially great uncertainty and underestimation. The majority of Intercept Participants were unable to estimate the kJ content of their purchases. Reassuringly however, **the proportion not able to do this declined significantly across Waves 2 and 3** (down from 76% to 66% respectively).

Those who did specify an amount typically underestimated, rather than overestimated, what they had consumed – and the large differences between actual and estimated figures highlighted the lack of understanding of kilojoule content. **Positively however, the proportion who underestimated reduced significantly during Wave2 and 3. Also, those whose estimate was accurate to within +/-10% of the actual figure increased significantly** from Wave 1 to Waves 2 and 3 (and from 7% to 13% and 14% respectively).

Figure 3.14: Estimated kilojoule content of items purchased (Intercept W1-W3)



Intercept 6a. Kilojoules is the measure of how much energy people get from consuming all foods or drinks, and is expressed in numbers. How many kilojoules do you think are contained in all the food and drinks you just consumed or purchased for yourself?
Intercept 1c. Please could you tell me exactly which food and drink items you just consumed or purchased for yourself? Please describe all items and sizes and quantities and give as much detail as possible.
Base: Note – reduced in accordance with only those providing valid answers to both 6a and 1c W1 n=178, W2 n=218; W3 n=202

↑ / ↓ Significantly Higher / Lower than proportion or mean at Wave 1 (95% ± confidence level)

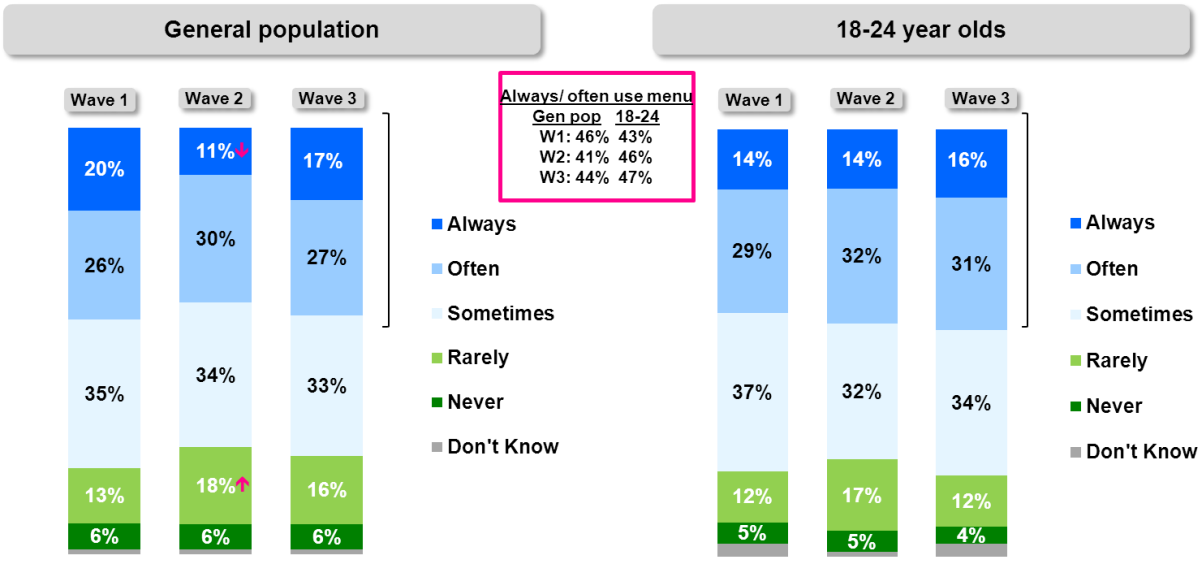
3.3 Salience and use of nutritional information in outlets

3.3.1 Frequency of menu use

Most fast food consumers use menus when making their decision, with just under half of both General Population Online Participants and the 18 to 24 year old Online Participants always or often doing so.

Responses remained largely unchanged across all three Waves.

Figure 3.15: Frequency of menu use (Online W1-W3)



Online 7a. In general, how often do you use the menu when choosing what to purchase for yourself in fast food and drink chains?
Base: (All respondents), W1 Gen. Pop. n=506; W2 Gen. Pop. n=528; Gen. Pop. n=531; W1 18-24 yr. olds n=217; W2 18-24 yr. olds n=213; W3 18-24 yr. olds n=206

↑ / ↓ Significantly Higher / Lower than proportion at Wave 1 (95% ± confidence level)

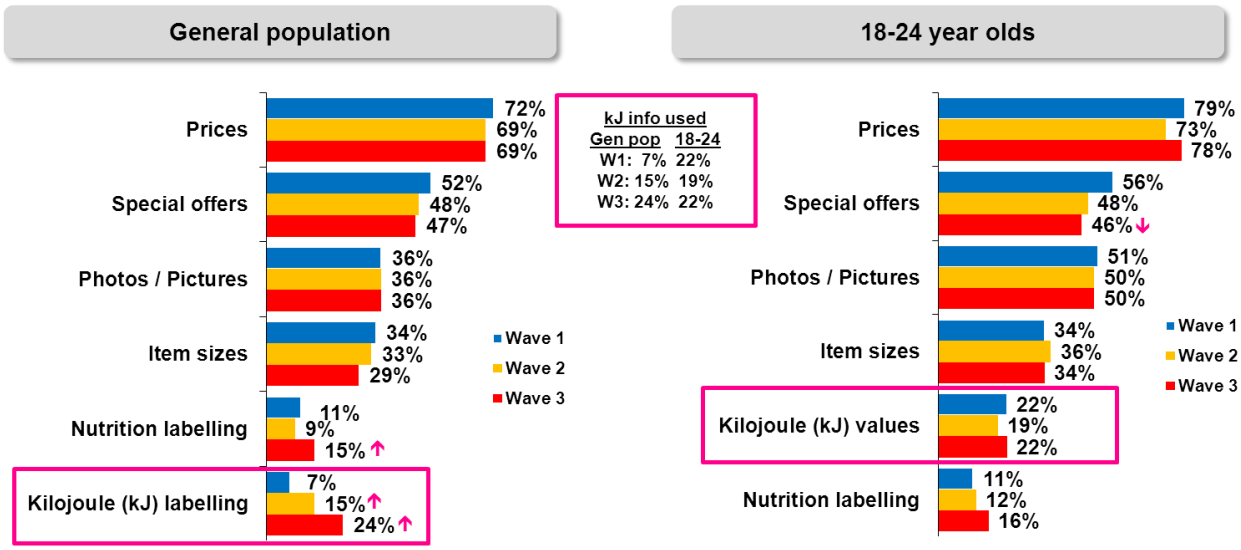
3.3.2 Menu information use

Looking at the menu information used by fast food consumers, prices and special offer information are used most, whereas nutrition and kilojoule labelling is used less often (see Figure 3.16 below).

However, the use of kilojoule information has increased significantly amongst General Population Online Participants in Waves 2 and 3.

The proportion of 18 to 24 year old Online Participants using the menu for kilojoule information commenced on a higher level than for General Population Online Participants, but remained relatively similar across Waves 1, 2 and 3 (although it is worth noting that legislation was already in place during Wave 1).

Figure 3.16: Information used off menu for purchase choices (Online W1-W3)



Online 7b. When choosing what to purchase for yourself in fast food and drink chains, what information do you use from the menu to help make your decision?
Base: (Respondents who use menus), W1 Gen. Pop. n=470; W2 Gen. Pop. n=487; W3 Gen. Pop. n=488; W1 18-24 yr. olds n=200; W2 18-24 yr. olds n=201; 18-24; W3 18-24 yr. olds n=193

↑ / ↓ Significantly Higher / Lower than proportion at Wave 1 (95% ± confidence level)

3.3.3 Nutritional considerations when purchasing fast food and drinks

In terms of nutritional items considered at purchase, fat and sugar consistently merged in pole position – and across both audience groups. This was followed by Saturated Fat and Calories for General Population Online Participants, and the same two but in reverse order for 18 to 24 year old Online Participants.

Around a quarter of participants always or often considered the kilojoule content of items purchased. No significant differences were observed across Waves for any of the nutrients. However, slight increases were noted for Energy, Protein and kJs amongst 18 to 24 year old Online Participants during Wave 3.

Figure 3.17: Nutritional considerations when purchasing fast food and drinks (Online W1-W3)

% Nett always/ often consider

General Population	Wave 1	Wave 2	Wave 3	18-24 years	Wave 1	Wave 2	Wave 3
Fat	33	37	34	Fat	32	32	31
Sugar	31	37	33	Sugar	32	27	28
Saturated fat	31	32	30	Calorie	31	25	29
Calorie	27	27	27	Saturated fat	30	27	30
Salt	27	28	27	**Kilojoule**	**26**	**24**	**28**
Kilojoule	**24**	**24**	**24**	Carbohydrate	23	20	24
Energy	22	22	23	Nutritional	23	23	24
Nutritional	22	24	25	Salt	22	22	21
Carbohydrate	19	22	22	Energy	21	22	26
Fibre	17	20	19	Protein	20	19	24
Protein	17	20	19	Fibre	16	15	19

Online C4. Now, thinking about the food and drink purchases you make for yourself only in fast food and drink outlets, how often do you consider the following things when making your choice?
Base: (All participants), W1 Gen. Pop. n=506; W2 Gen. Pop. n=528; W3 Gen. Pop n= 531; W1 18-24 yr. olds n=217; W2 18-24 yr. olds n=213; 18-24 yr. olds n=206

3.4 Role of information on behaviour & perceived impact of Fast Choices legislation

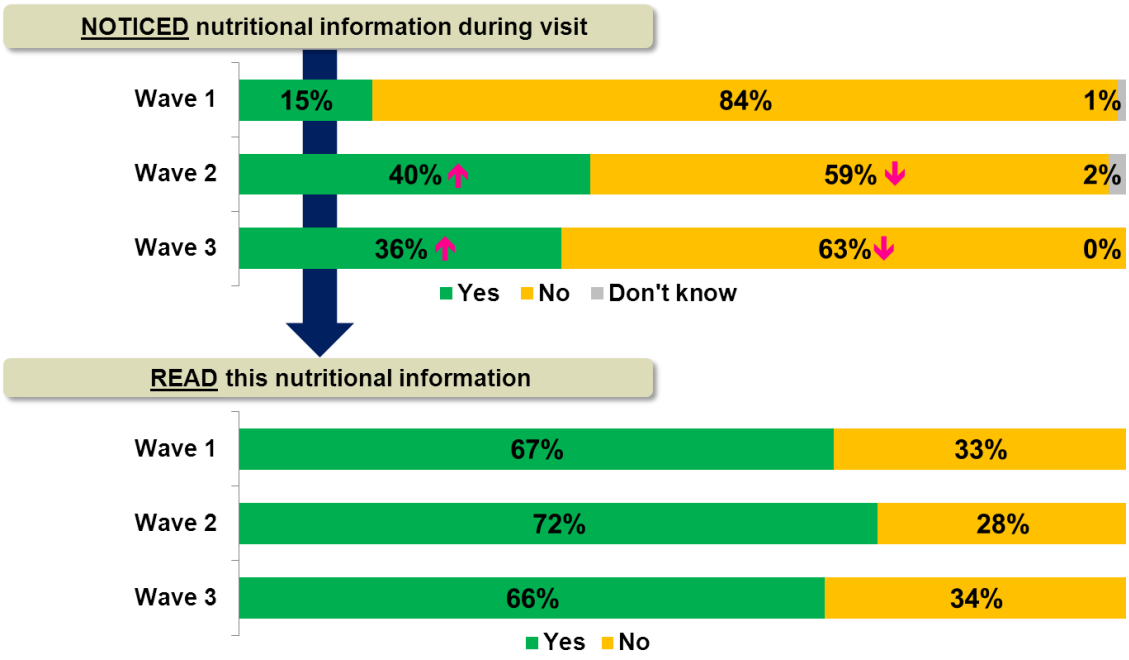
The Intercept Surveys

3.4.1 Awareness of nutritional information at outlet

Of the people interviewed for Wave 1 of the Intercept Survey only 15% indicated that they had noticed any nutritional information during their visit. Of these, two thirds (67%) reported that they had actually read this nutritional information.

During Waves 2 and 3 of the survey there was a **significant increase in those noticing nutritional information** (W2 40%, W3 36%) relative to Wave 1. There was a slight increase in readership at Wave 2, before dropping back at Wave 3, as shown in Figure 3.18 below.

Figure 3.18: Awareness of nutritional information at outlet (Intercept W1-3)



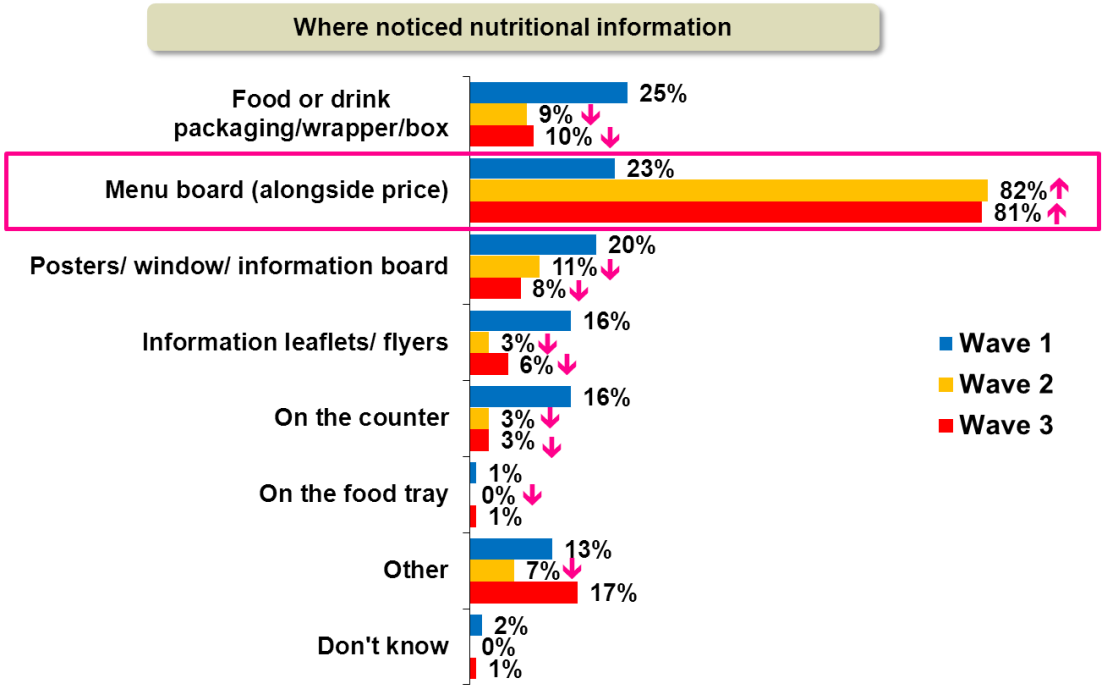
Intercept 4a. Whilst in the outlet, have you noticed any information about the nutritional contents of the food or drink items?
Base: All respondents, W1 Intercept n=815; Wave 2 Intercept n=807; Wave 3 Intercept n=805
Intercept 4b. And, did you read this information?
Base: Respondents who had noticed nutritional information, W1 Intercept n=122; Wave 2 Intercept n=321; Wave 3 Intercept n=293
↑ / ↓ Significantly Higher / Lower than proportion at Wave 1 (95% ± confidence level)

3.4.2 Location of nutritional information in outlets

In Wave 1 of the Intercept Survey, a quarter of participants noticed nutritional information on the packaging/ wrapper/ box, while only slightly fewer (23%) reported that they had seen the information on the menu board alongside the price.

Waves 2 and 3 saw a **significant increase in mentions of the menu board labelling** and resultant decreases in mentions of all other locations.

Figure 3.19: Location of nutritional information observed (Intercept W1-W3)



Intercept 4d. Where in the outlet did you see the nutritional information?
Base: All who have read nutritional information in the outlet ,W1 Intercept n=122; Wave 2 Intercept n=321; Wave 3 Intercept n=293

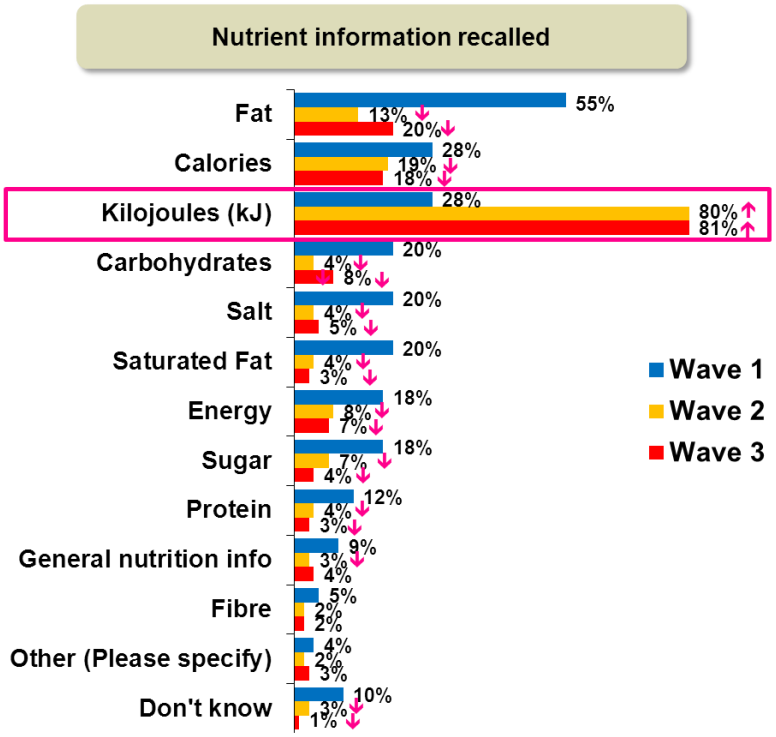
↑ / ↓ Significantly Higher / Lower than proportion at Wave 1 (95% ± confidence level)

3.4.3 Prompted recall of specific nutritional information at outlet

When asked to recall which specific nutrients Intercept Participants had seen information for, the most salient, in Wave 1 of the Intercept Survey, was fat content (55%).

However, **recall of kilojoule content increased significantly** from 28% in Wave 1, to 80% in Wave 2 and 81% in Wave 3, together with a significant reduction in mentions of fat and other nutrients.

Figure 3.20: Nutritional information recalled (Intercept W1-W3)



Intercept 4c. Which nutrients was the information about?
Base: All who have read nutritional information in the outlet ,W1 Intercept n=122; Wave 2 Intercept n=230; Wave 3 Intercept n=193

↑ / ↓ Significantly Higher / Lower than proportion at Wave 1 (95% ± confidence level)

In summary, during Wave 2 n=807 Intercept Participants were asked whether they noticed any information about nutritional contents of the food or drinks items, of these n=321 (40%) confirmed they had. Of these 82% mentioned noticing it on the menu board, and in terms of what nutrients it was about, 80% mentioned kilojoules specifically. So when crossing location by nutrient (amongst those who had noticed information i.e. n=321), **n=159 (50%) correctly identified 'kilojoules' specifically on the menu board.**

During Wave 3 n=805 Intercept Participants were asked whether they noticed any information about nutritional contents of the food or drinks items, of these n=293 (36%) confirmed they had. Of these 81% mentioned noticing it on the menu board, and in terms of what nutrients it was about, 81% mentioned kilojoules specifically. So when

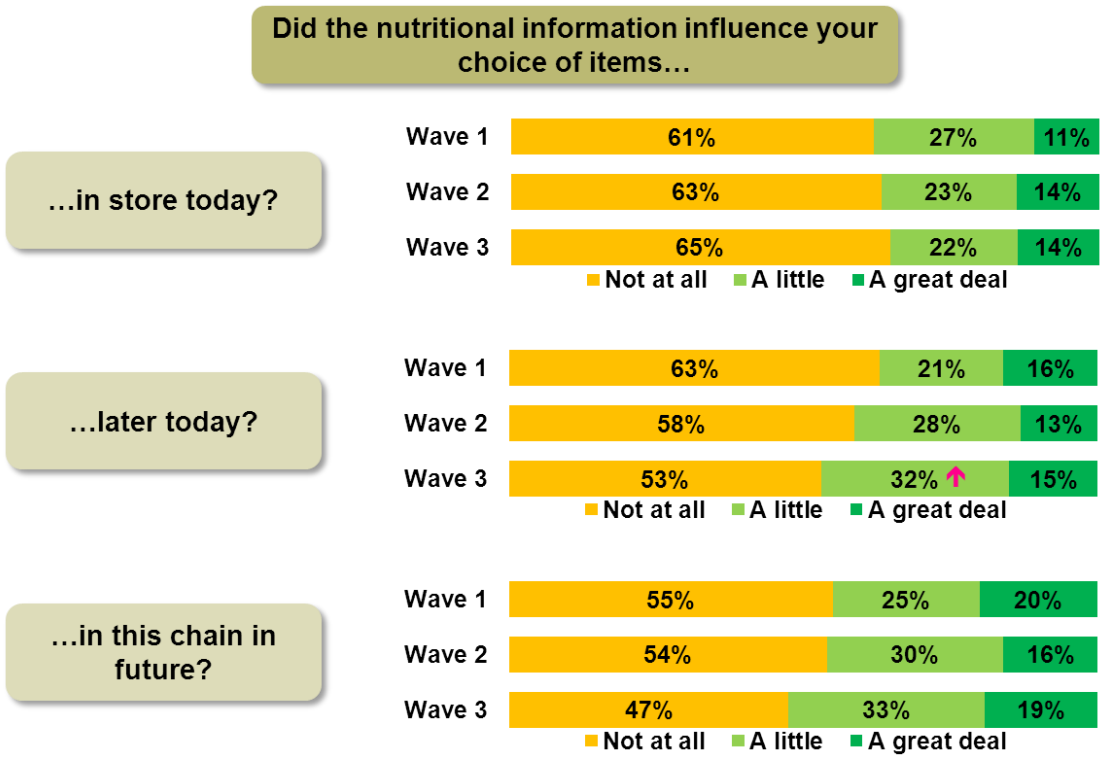
crossing location by nutrient (amongst those who had noticed information i.e. n=293), **n=156 (53%) correctly identified 'kilojoules' specifically on the menu board.**

3.4.4 Reported influence of nutritional information on site

Amongst Intercept Participants, the reported influence of nutritional information on purchases appears to vary with time. Findings suggest that the value of providing nutritional information is not in fact influencing food choices there and then but that it might have a more indirect impact on food choices in a longer term and on-going sense.

So, although just over a third of Intercept Participants said that it had influenced their food and drink choice 'in store today', this proportion remained relatively consistent across all three Waves. However, just over a third also stated that it had influenced their choice of food and drinks 'later that day' during Wave 1 but this proportion increased during Waves 2 and 3. Also, just under half indicated that it had influenced their choice of food and drinks 'in the chain in the future' during Wave 1 whereas this proportion also increased during Waves 2 and 3.

Figure 3.21: Influence of nutritional information on site (Intercept W1-3)



Intercept 4e. How much, if at all, did the nutritional information you saw influence....
Base: All who have read nutritional information in the outlet ,W1 Intercept n=122; Wave 2 Intercept n=321; Wave 3 Intercept n=293

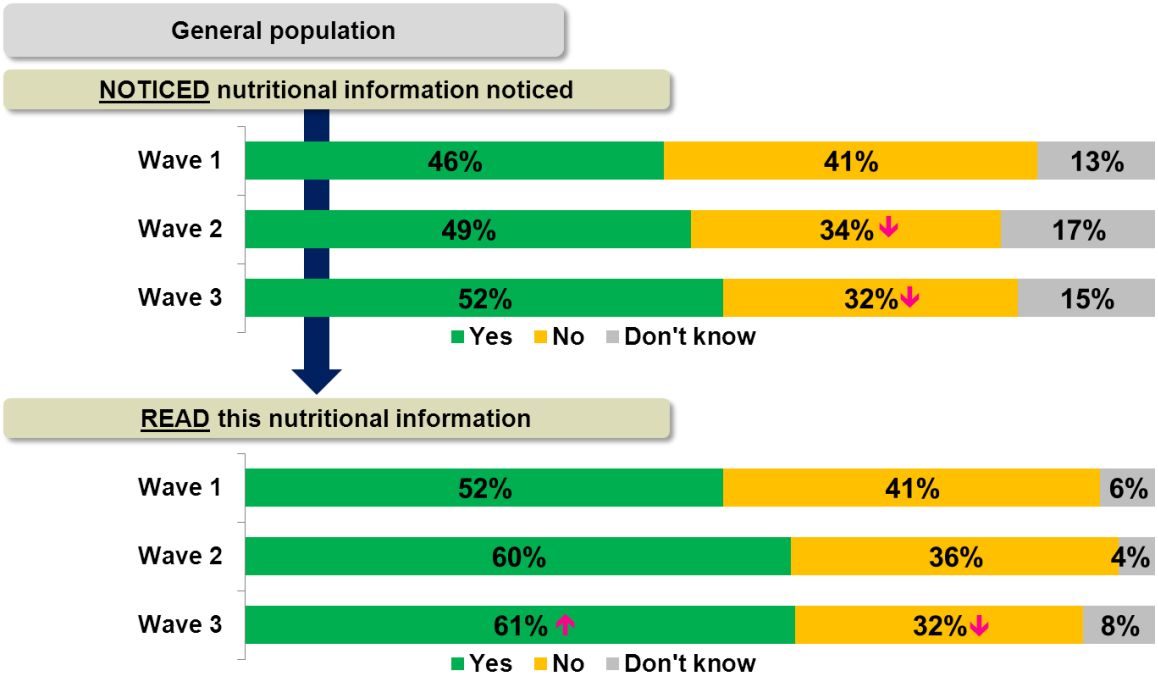
↑ / ↓ Significantly Higher / Lower than proportion at Wave 1 (95% ± confidence level)

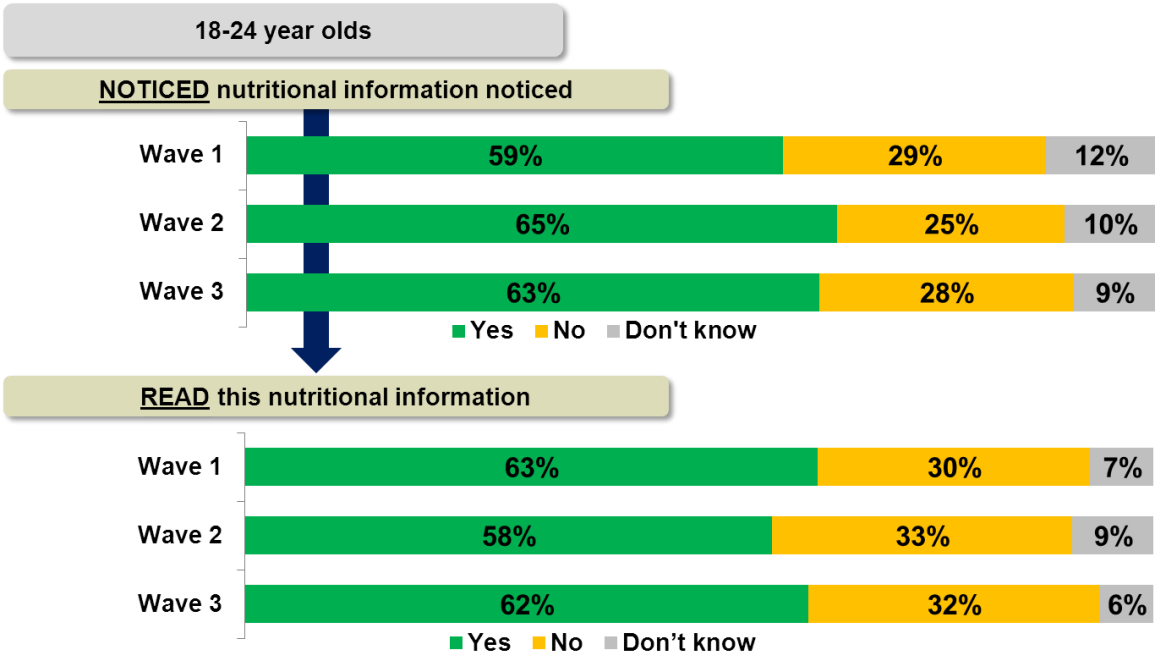
3.4.5 Awareness of nutritional information at outlet

Amongst the General Population Online Participants there has been a progressive increase **in those who have noticed nutritional information in fast food / drink outlets** from Waves 1 to 3.

Of those who had ever noticed information, there was an increase in nutrient information readership from Wave 1 to Wave 2, and a significant increase from Wave 1 to Wave 3.

Figure 3.22: Awareness of nutritional information at outlet – Noticed/ read (Online W1-3)





B1. Online. Have you ever noticed nutritional information when making a purchase from fast food and drink outlets?
Base: (All participants), Gen pop W1 n=506; W2 n=528, W3 n=531; 18-24 W1 n=217; W2 n=213, W3 n=206
B3. Online. Did you read this nutritional information?
Base: Participants who noticed this nutritional information, Gen pop W1 n=233, W2 n=257, w3 n=254: 18-24 W1 n=128, W2 n=138, W3 n=130

For the 18 to 24 year old Online Survey, higher levels of observation were recorded relative to the General Population Online Survey, and similarly, there was an increase in overall nutrient observation during Waves 2 and 3. Subsequent readership levels however, remained relatively static, with a slight dip during Wave 2 before returning to levels observed during Wave 1.

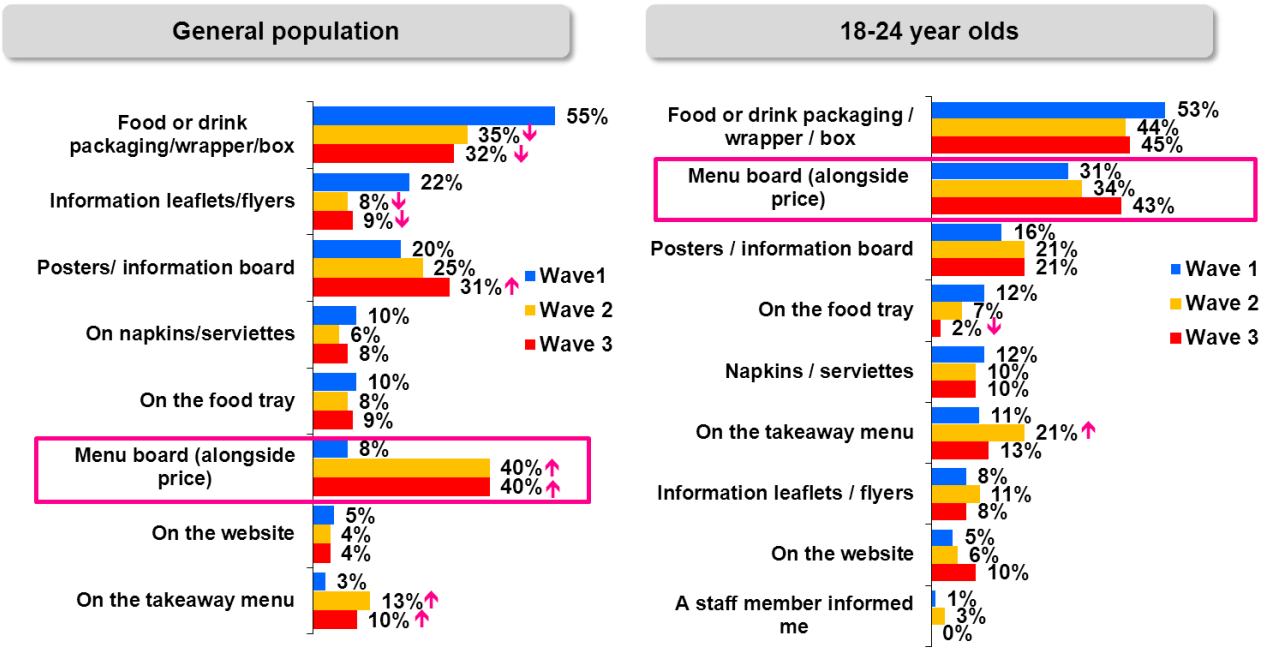
Overall however, greater numbers are at least noticing the information.

3.4.6 Location of nutritional information observed

When asked the location of nutritional information in the online studies, just over half of participants initially (at Wave 1) reported seeing it on the packaging, with mentions of this declining at Waves 2 and 3 (and significantly so amongst General Population Online Participants).

There was further a **significant jump in those noticing nutritional information on the menu amongst General Population Online Participants.** Although equally high levels of menu labelling observation were noted within the 18 to 24 year old Online Survey, a less significant increase in observations was detected - likely due to the fact that legislation was already in place during Wave 1 and a shorter time-span between the conduct of Waves 1 and 2.

Figure 3.23: Location of nutritional information observed (Online W1-3)



Online B9. Where did you see or hear the nutritional information?
Base: (All who have ever read nutritional information) W1 Gen. Pop. n=189; W2 Gen. Pop. n=204; W3 Gen Pop n=212; W1 18-24 yr. olds n=110; W2 18-24 yr. olds n=118; W3 18-24 yr. olds n=114

↑ / ↓ Significantly Higher / Lower than proportion at Wave 1 (95% ± confidence level)

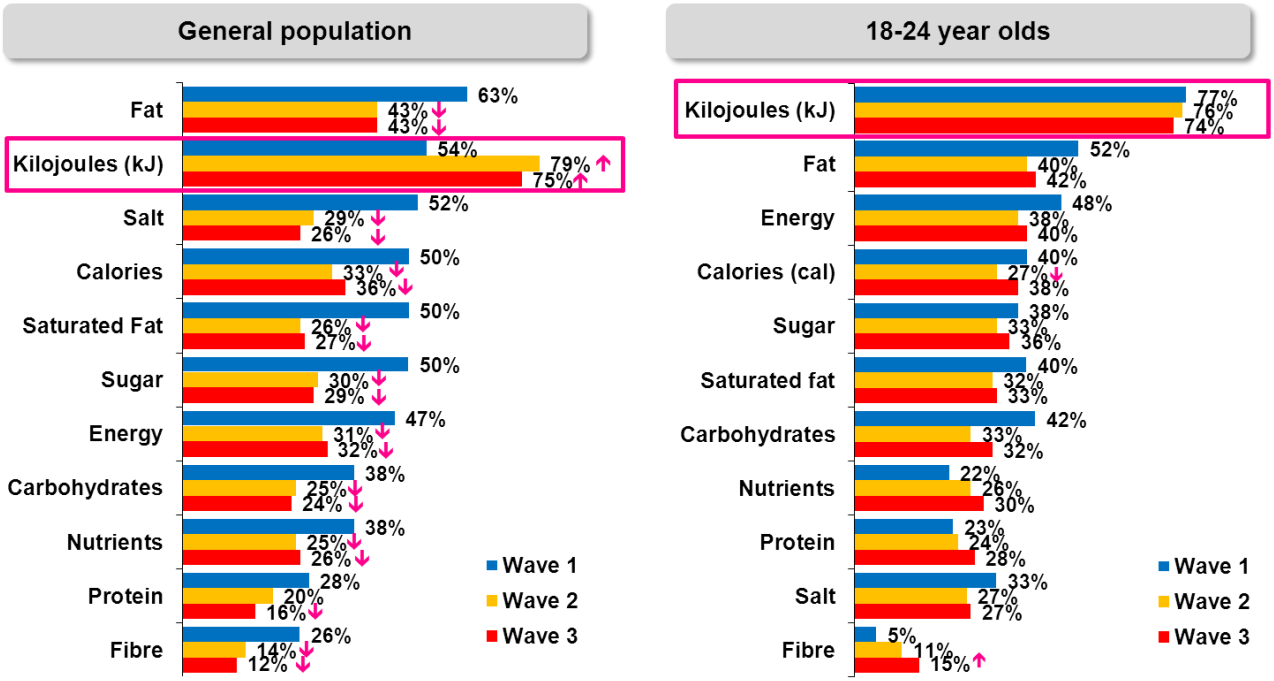
3.4.7 Prompted recall of specific nutritional information observed

As with the intercept findings, the online surveys showed fat to be one of the most salient nutrients expressed during Wave 1.

However, **in Waves 2 and 3 the salience of kilojoules jumped significantly** amongst General Population Online Participants (together with a decrease in salience of all other nutrients).

Amongst 18 to 24 year old Online Participants kilojoules were by far the most salient nutrient, with around three-quarters recalling seeing this information, and a proportion consistent across all 3 Waves. These findings are however, unsurprising seeing that fieldwork for Wave 1 of the 18-24 survey was completed just prior to kJ labelling becoming mandatory – with most outlets having already introduced it.

Figure 3.24: Prompted recall of specific nutritional information observed (Online W1-3)



Online B8. Which nutrients was the information about?
Base: (All who have ever read nutritional information) W1 Gen. Pop. n=189; W2 Gen. Pop. n=204; W3 Gen. Pop. n=212; W1 18-24 yr. olds n=110; W2 18-24 yr. olds n=118; W3 18-24 yr. olds n=114

↑ / ↓ Significantly Higher / Lower than proportion at Wave 1 (95% ± confidence level)

In summary, when crossing location of where nutritional information was noticed (i.e. menu board) by specific nutrient (i.e. kJs) - amongst those who stated ever noticing and reading nutritional information when making a purchase from fast food and drink outlets - the following figures emerged:

General Population Online Survey

- During Wave 1 n=5 (5%) participants correctly identified 'kilojoules' specifically on the menu board (of n=189 who noticed and read nutritional information).
- During Wave 2 n=75 (46%) participants correctly identified 'kilojoules' specifically on the menu board (of n=204 who noticed and read nutritional information).
- During Wave 3 n=70 (44%) participants correctly identified 'kilojoules' specifically on the menu board (of n=212 who noticed and read nutritional information).

18-24 year old Online Survey

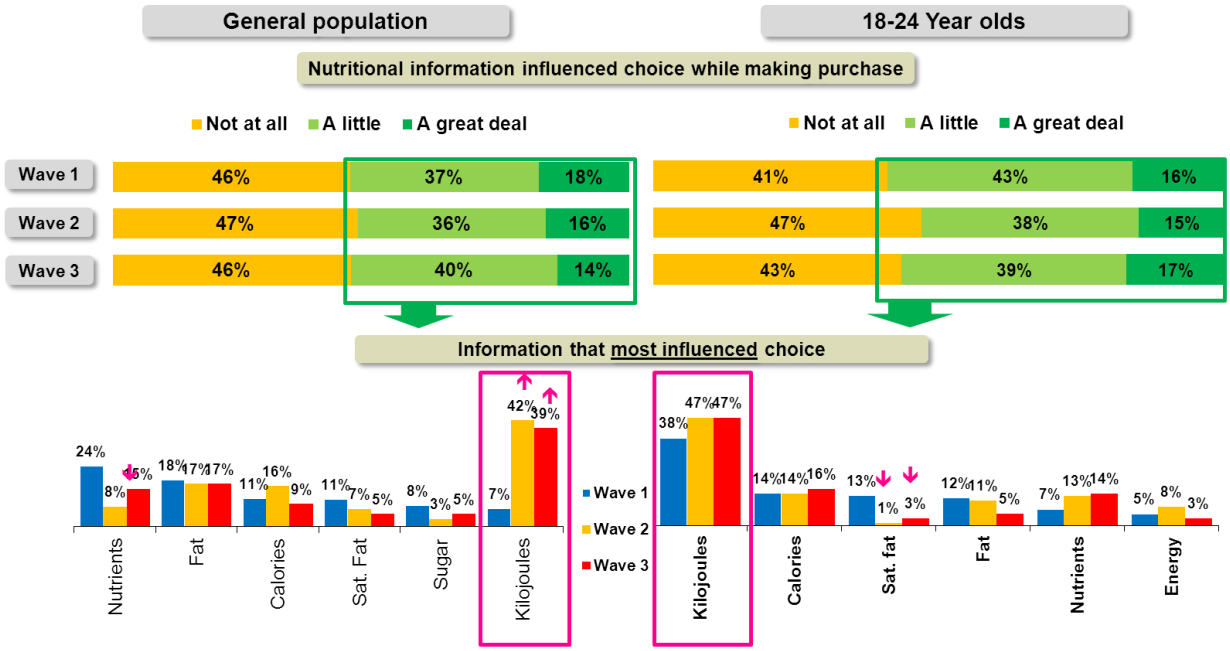
- During Wave 1 n=28 (33%) correctly identified 'kilojoules' specifically on the menu board (of n=110 who noticed and read nutritional information at an outlet).
- During Wave 2 n=39 (43%) correctly identified 'kilojoules' specifically on the menu board (of n=118 who noticed and read nutritional information).
- During Wave 3 n=42 (50%) correctly identified 'kilojoules' specifically on the menu board (of n=114 who noticed and read nutritional information).

3.4.8 Reported influence of nutritional information on choice

Just over half of all survey participants stated that nutritional information influenced their choice of items 'a little' or 'a great deal' during their last purchase. Proportions remained fairly similar across all three Waves and both audience segments (General Population Online Participants and the 18 to 24 year old Online Participants).

Amongst those participants who agreed that nutritional information influenced their choice, there was a **significant increase in General Population Online Participants and a slight increase in 18 to 24 year old Online Participants, reporting that kilojoule information most influenced their choice**.

Figure 3.25: Reported influence of nutritional information on choice (Online W1-3)



Online B10. How much, if at all, did the nutritional information influence....Base: All who have ever read nutritional information, W1 18-24. n=109; W2 18-24 n=117; W3 Gen. Pop. n=114
Online B11. Which items of nutritional information most influenced your choice? Base: All who were influenced a little or great deal while making purchase, W1 18-24 n=64; W2 18-24 n=62; W3 18-24 yr. olds n=66

↑ / ↓ Significantly Higher / Lower than proportion at Wave 1 (95% ± confidence level)

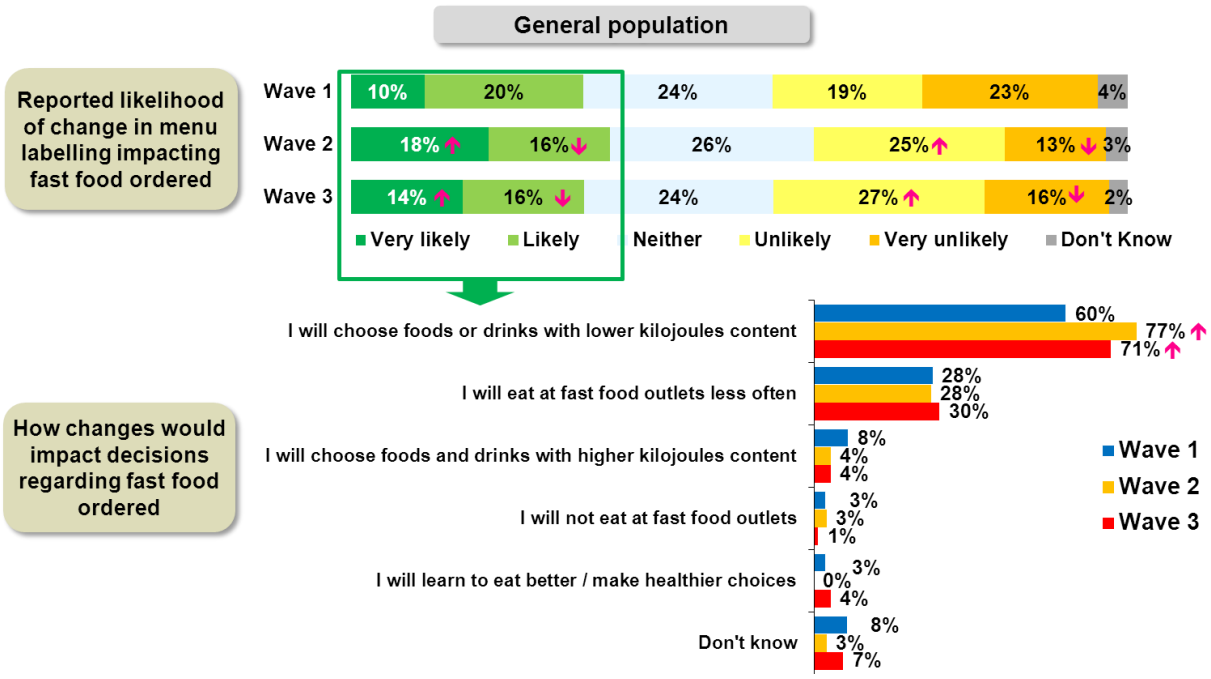
3.4.9 Anticipated impact of menu labelling changes

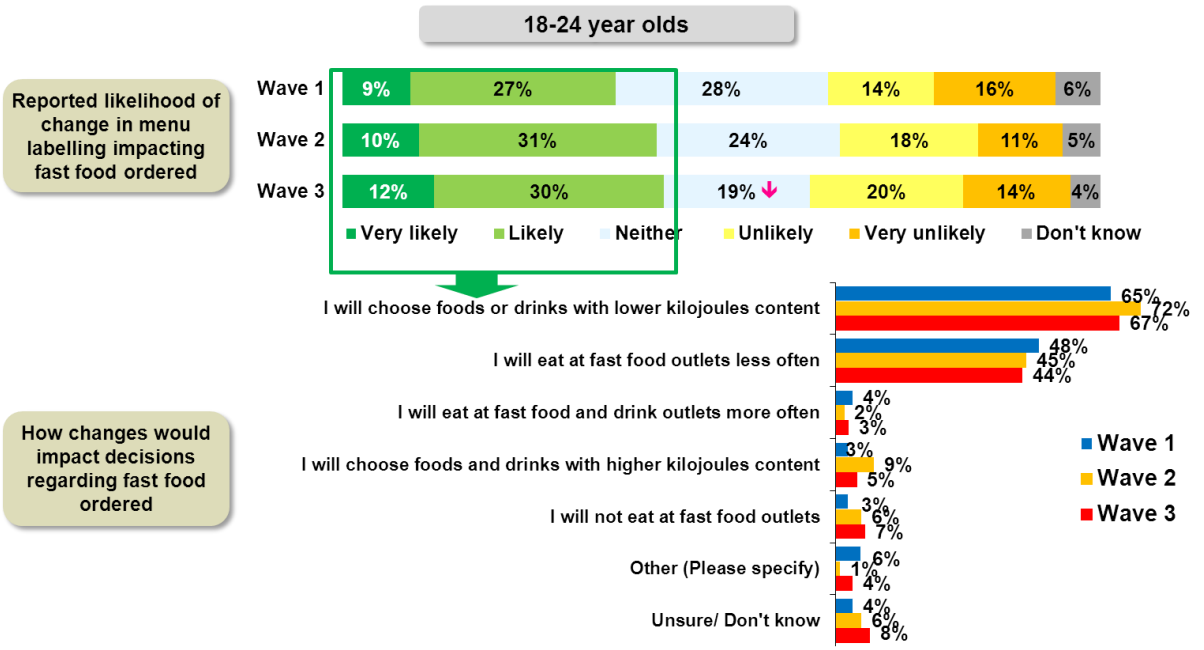
Amongst General Population Online Participants, and during Waves 2 and 3, there was a **significant increase in those reporting that the kilojoule labelling would 'very likely' impact their choice** relative to Wave 1. This was however, largely offset by a significant decline in those reported that it was only 'likely' to impact their choice. Overall, there was therefore only a slight increase in those who reported that the menu labelling would influence their choice at all.

18 to 24 year old Online Participants were slightly more likely to report that the menu labelling would impact their decision-making, with this likelihood increasing progressively from Waves 1 to 3.

For those who reported that they would be influenced by labelling changes, the majority stated **they would use the labelling to purchase items with lower kilojoule content** – this response increased significantly in Waves 2 and 3 for the General Population Online Participants and the 18 to 24 year old Online Participants.

Figure 3.26: Anticipated impact of menu labelling changes (Online W1-W3)





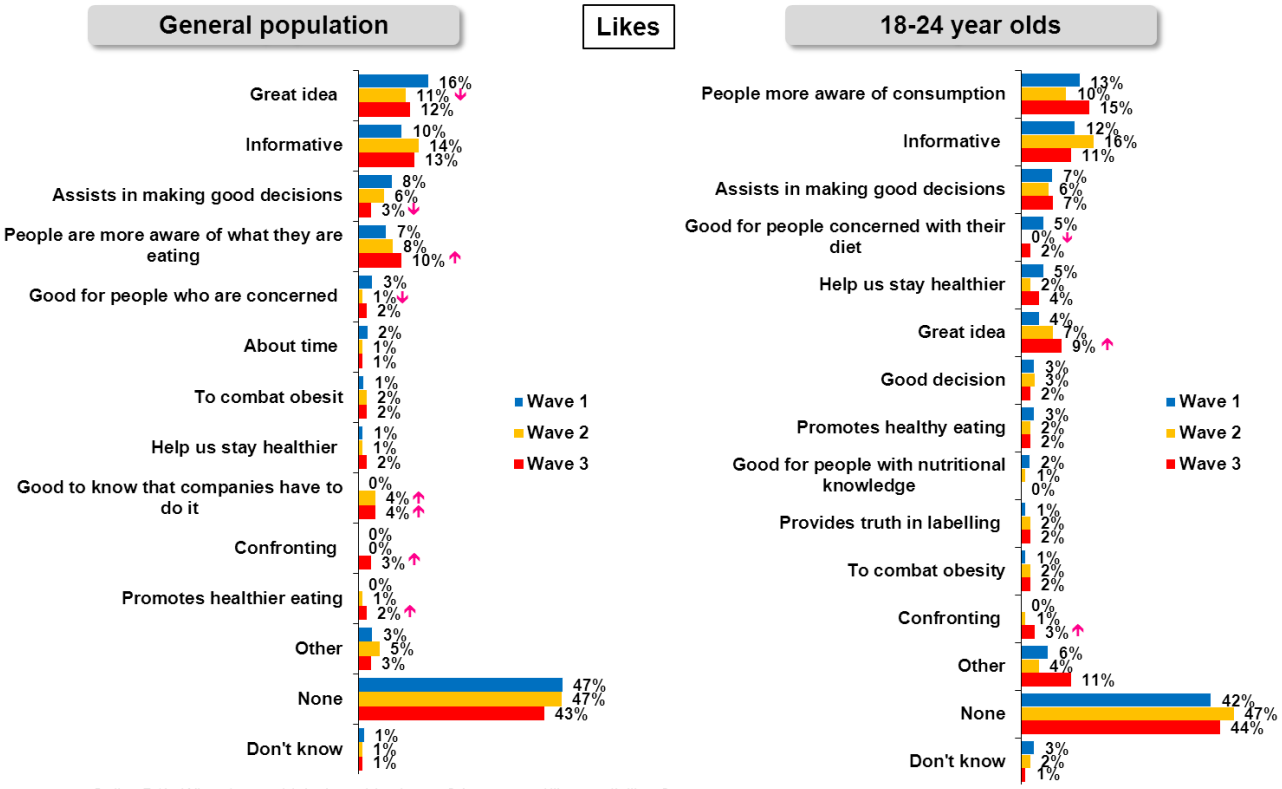
Online D2. Is this change in labelling likely to impact your decisions regarding the fast food and drink you order?
Base: (All participants), Gen pop W1 n=506; W2 n=528, W3 n=531; 18-24 W1 n=217; W2 n=213, W3 n=206
Online D3. In what ways is this change in menu labelling likely to impact your decisions regarding the fast food and drink you order?
Base: All who consider it very likely or likely changes will impact their decisions, Gen pop W1 n=151, W2 n=201, W3 n=232; 18-24 W1 n=81, W2 n=96, W3 n=90

3.4.10 Reactions to the kilojoule labelling – likes & dislikes

Online participants were asked what they thought of the changes to legislation. Overall, this provoked a fairly ambivalent response, with just under half, from both cohorts (General Population Online Participants and the 18 to 24 year old Online Participants) and across all three Waves, not having any particular likes.

Those who gave positive responses broadly praised the legislation and noted that kilojoule information would allow people to make good decisions.

Figure 3.27: Reactions to the kilojoule labelling – likes (Online W1-W3)

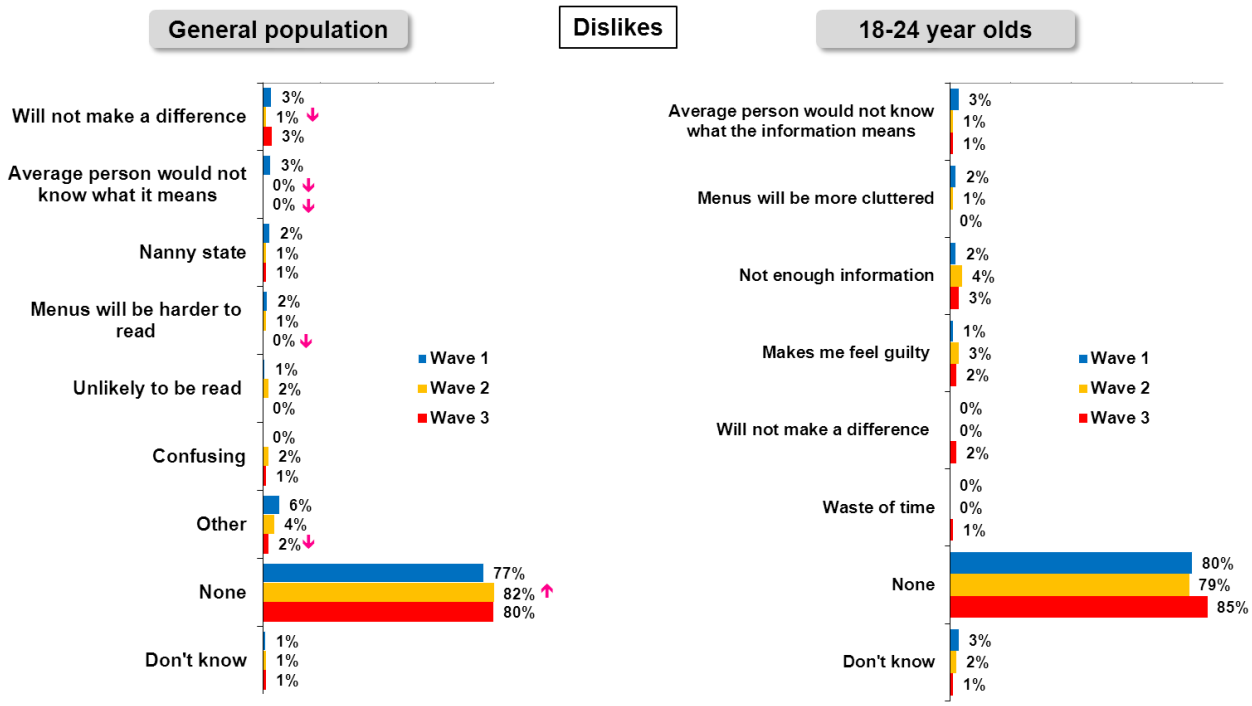


Online D1b. What do you think about this change? Any general likes or dislikes?
Base: (All respondents), W1 Gen. Pop. n=506; W2 Gen. Pop. n=528; W3 Gen Pop n=531; W1 18-24 yr. olds n=217; W2 18-24 yr. olds n=213; W3 18-24 yr. olds n=206

↑ / ↓ Significantly Higher / Lower than proportion at Wave 1 (95% ± confidence level)

Positively, however, the vast majority of both cohorts did not express any dislikes about the initiative – this response increased significantly in Wave 2 of the general population survey. This indicates continuing acceptance of the kilojoule labelling legislation, with few dislikes.

Figure 3.28: Reactions to the kilojoule labelling – dislikes (Online W1-W3)



Online D1a. What do you think about this change? Any general likes or dislikes?
Base: (All respondents), W1 Gen. Pop. n=506; W2 Gen. Pop. n=528; W3 Gen Pop n=531; W1 18-24 yr. olds n=217; W2 18-24 yr. olds n=213; W3 18-24 yr. olds n=206

↑ / ↓ Significantly Higher / Lower than proportion at Wave 1 (95% ± confidence level)

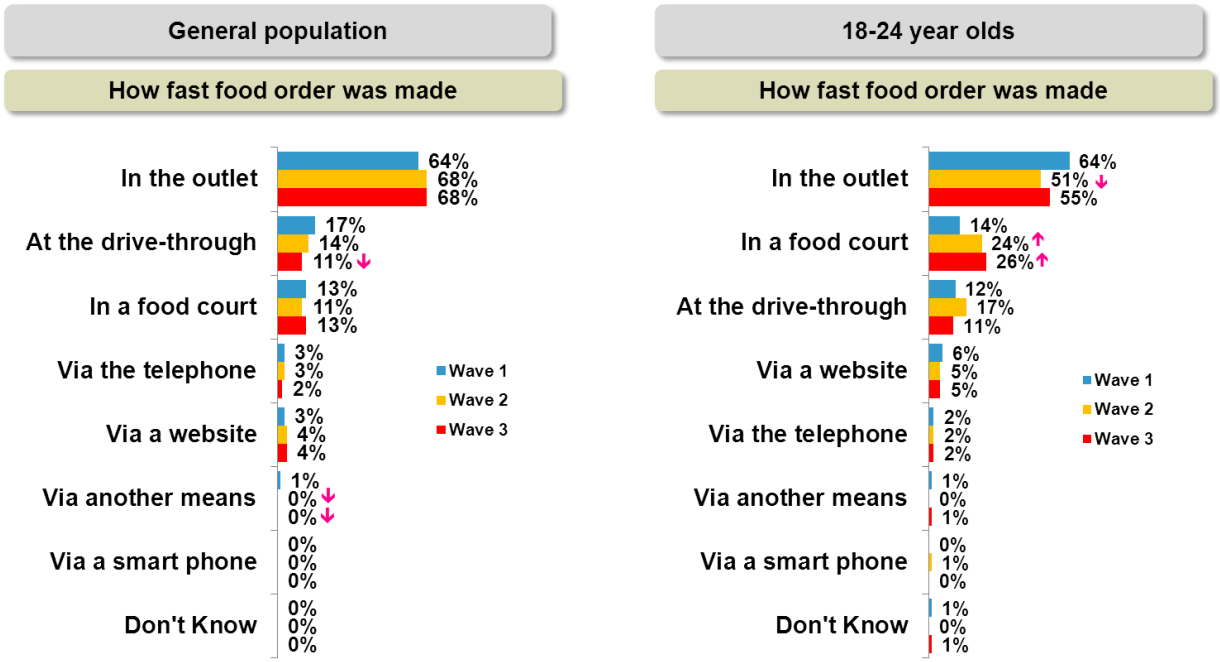
3.5 The Communications Campaign

3.5.1 Primary purchase locations

The vast majority of participants place their order in person – primarily in the outlet itself, otherwise at the drive through, or in a food courts. Ordering by telephone, via the website or smart phone occurred considerably less frequently.

Results were reasonable consistent across all three Waves, although 18 to 24 year old Online Participants indicated a decrease in ordering in outlets together with an increase in ordering in food courts, whereas General Population Online Participants indicated a decreased incidence of ordering at drive-thrus.

Figure 3.29: Primary purchase locations (Online W1-3)



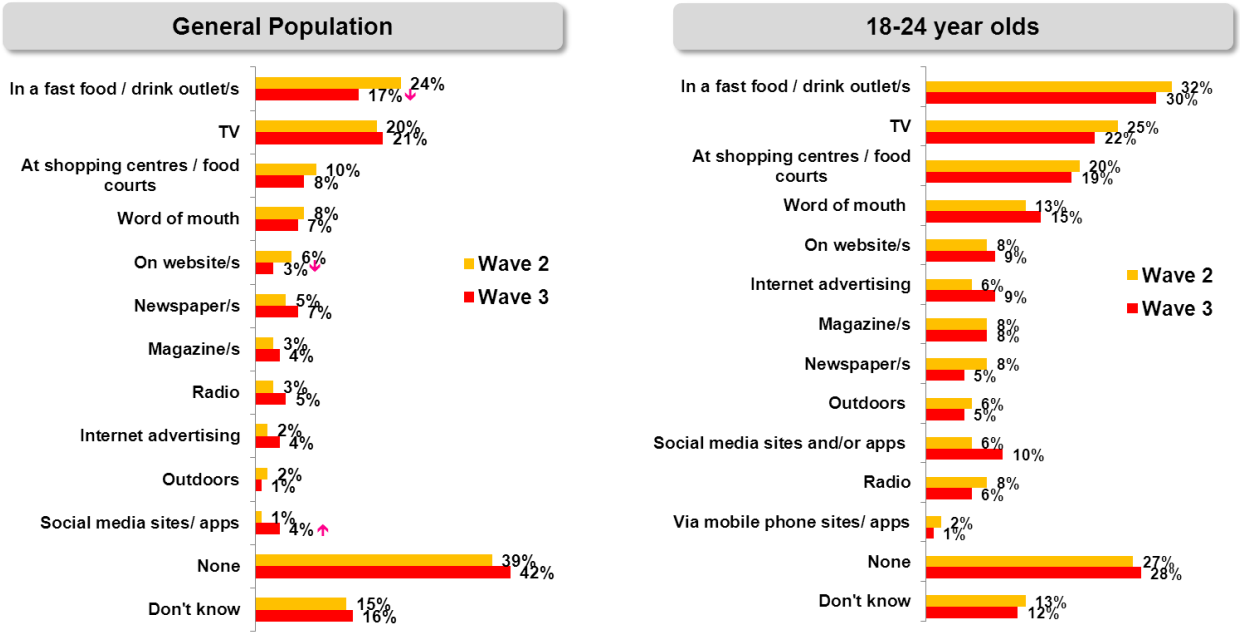
Online A4. How did you make the order?
Base: (All respondents), W1 Gen. Pop. n=506; W2 Gen. Pop. n=528; W3 Gen Pop n=531; W1 18-24 yr. olds n=217; W2 18-24 yr. olds n=213; W3 18-24 yrs. Old n=206
↑ / ↓ Significantly Higher / Lower than proportion at Wave 1 (95% ± confidence level)

3.5.2 Spontaneous Awareness – Perceived location of advertising

Post launch of the campaign, in Wave 2, all online participants were asked to recall the location of any recent advertising regarding kilojoule food and drink labelling. Whilst the campaign did not specifically target the general population, participants in this survey were also asked this question.

Across both cohorts, the highest mentions were achieved for advertising in the outlets themselves, followed by claimed TV advertising and then advertising in **shopping centres / food courts**. This latter proportion remaining steady amongst 18 to 24 year old Online Participants, but declined amongst General Population Online Participants.

Figure 3.30: Spontaneous Awareness – Perceived location of advertising (Online W1-W3)



Online X1. Have you seen or heard any advertising recently about kilojoule food and drink labelling in fast food and drink outlets? If so, where did you see or hear it?
Base: (All respondents), W2 Gen. Pop. n=528; W3 Gen Pop n=531; W1 18-24 yr. olds n=217; W2 18-24 yr. olds n=213; W3 18-24 yr. olds n=206

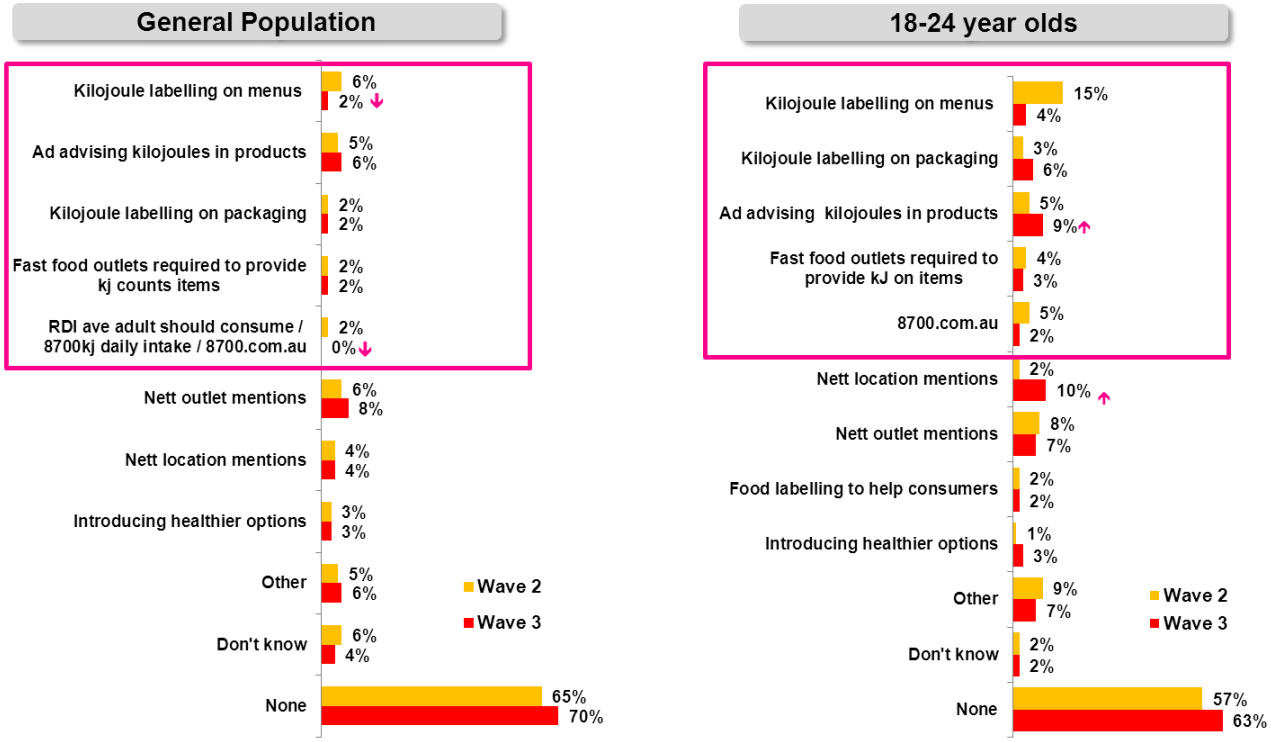
↑ / ↓ Significantly Higher / Lower than proportion at Wave 1 (95% ± confidence level)

3.5.3 Spontaneous Awareness – Recalled content of advertising

All online participants were then asked to describe any advertising they had seen or heard.

Around two thirds of participants did not recall any advertising. Of those who did describe an advert, **most mentioned the kilojoule labelling** itself, including mentions of the menu board and 8700.com.au website. Others simply referred to the outlets specifically e.g. McDonalds, Subway.

Figure 3.31: Spontaneous Awareness – Recalled content of advertising (Online W1-W3)



Online X2. Now please describe the ads you've seen or heard recently that were about kilojoule food and drink labelling in fast food and drink outlets. Describe all of the ads you can remember – telling us what was happening in the ad or what it was trying to say?
Base: (All respondents), W2 Gen. Pop. n=528; W3 Gen Pop n=531; W1 18-24 yr. olds n=217; W2 18-24 yr. olds n=213; W3 18-24 yr. olds n=206

↑ / ↓ Significantly Higher / Lower than proportion at Wave 1 (95% ± confidence level)

3.5.4 Prompted Awareness – Seen / heard elements of the campaign

In Waves 2 and 3 of each online survey, participants were prompted with campaign stimuli and asked whether they had seen or heard different elements of the campaign – the posters, search engine ads, web banners, radio ads, Facebook and mobile ads.

Participants were also prompted with functional elements of the campaign – the website, Facebook page and mobile apps – and asked if they had seen or used them.

In line with the targeted nature of the campaign, 18 to 24 year old Online Participants more often stated being aware of each of the campaign elements than the General Population Online Participants. The **poster ads were seen by around a quarter of this audience during Wave 2, with recall increasing to just under a third during Wave 3.** This was followed by recall of the Online Facebook ads and then, to a lesser extent, the Website, search engine ads and radio ads.

In total, one in ten (9%) of 18-24 year-olds reported using the website, with a further 5% aware of it. Interestingly, **just over a fifth (21%) had seen the Facebook ads**, but only 1% had used them. In terms of raising awareness at least, Facebook seems to be a useful tool.

Although the vast majority of the General Population Online Participants had not seen the campaign elements, cut through had been greatest for the Poster ads and search engine ads.

Figure 3.32: Prompted Awareness – Seen / heard elements of the campaign (Online W1-W3)

% Yes

General Population	Wave 2	Wave 3	18-24 years	Wave 2	Wave 3
Poster ads	9	9	Poster ads	23	31
Online Facebook ads	3	5	Online Facebook ads	22	↓16
Website	4	4	Website	14	↓9
Search engine ads	3	↑10	Search engine ads	13	16
Radio ads	2	NA	Radio ads	13	NA
Web banner	3	5	Web banner	6	10
Mobile app	1	↑3	Mobile app	5	↑9
Mobile ads	1	2	Mobile ads	5	8
Facebook page	1	3	Facebook page	4	6

Online Y2a-g. Have you seen/ heard any of these ads before?
Base: (All participants), W2 Gen. Pop. n=528; W3 Gen. Pop. n=531
Base: (All participants), W2 18-24 yr. olds n=213; W3 18-24 yr. olds n=206

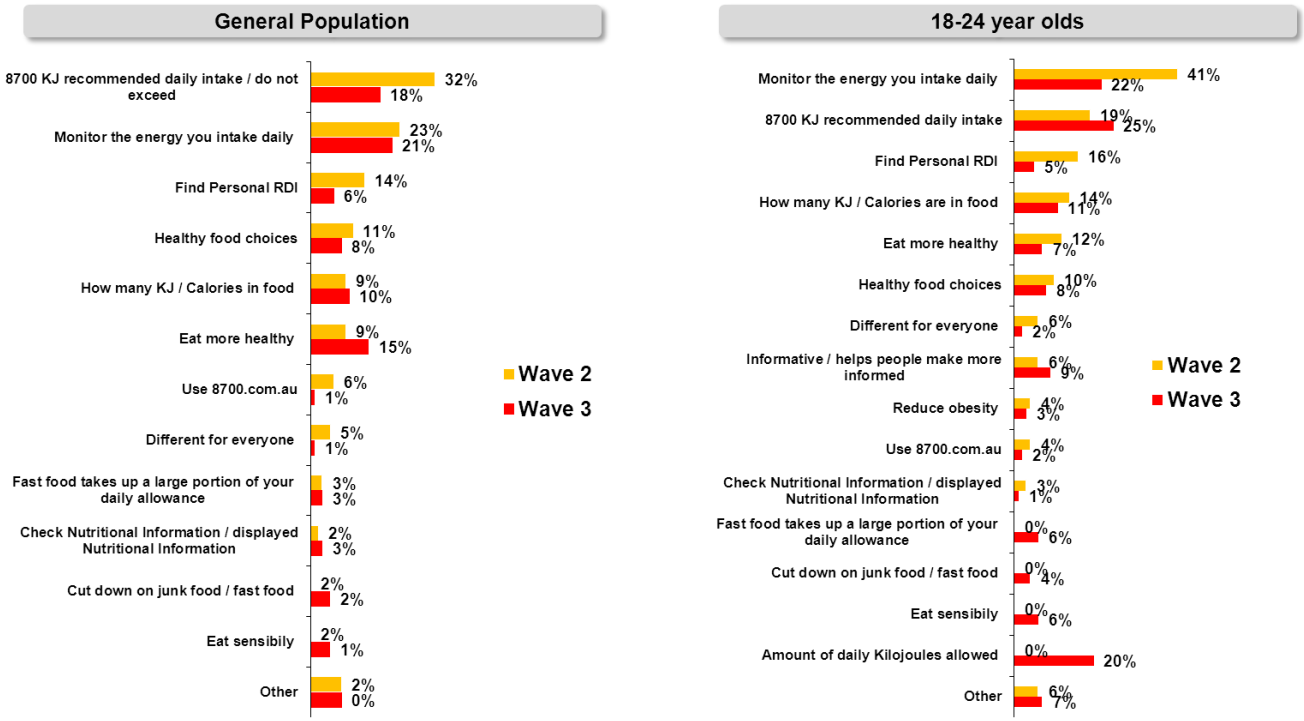
3.5.5 Prompted campaign message takeout

After viewing all the campaign stimuli, participants were prompted for the main message of the campaign.

The target audience, 18 to 24 year old Online Participants, most often stated it was **to 'monitor the energy you intake daily' and/or '8700kJ recommended daily intake'**. Other mentions included 'find your personal RDI', 'how many kilojoules are in food', and 'eat more health'/ 'healthy food choices'. Although responses were relatively consistent across Waves 2 and 3, and simply an interchange of proportions across main mentions, there was an additional mention noted, namely the 'amount of daily kJs allowed'.

Amongst General Population Online Participants a similar range and ordering of mentions was achieved, with most mentions achieved for '8700kJ recommended daily intake' (32%) and to 'monitor your own daily intake' (23%), and with an increased number of mentions to 'eat more healthy'.

Figure 3.33: Prompted campaign message takeout (Online W1-W3)



Online Y3. Having now heard/ viewed all elements of the campaign, in your own words, tell us what you think the overall campaign is trying to tell you? What is the main message?
Base: (All respondents), W2 Gen. Pop. n=528; W3 Gen. Pop. n=531; W2 18-24 yr. olds n=213; W3 18-24 yr. olds n=206

↑ / ↓ Significantly Higher / Lower than proportion at Wave 1 (95% ± confidence level)

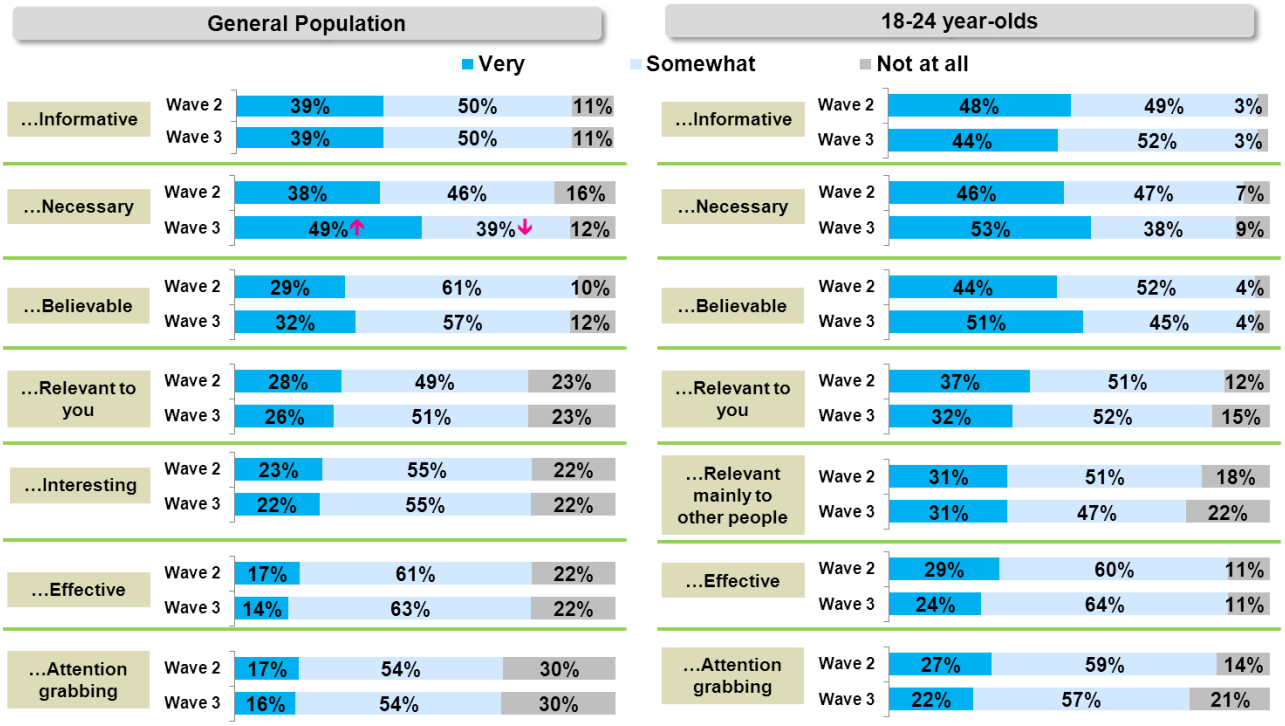
3.5.6 Prompted impressions of the campaign

Online participants were prompted for their impressions of the campaign via a variety of agreement statements.

Reassuringly, the vast majority, in both cohorts, saw the campaign as 'informative', 'necessary', 'believable' and 'relevant to them' – over three-quarters agreeing to each of these statements.

Results remained relatively consistent across Waves, although amongst General Population Online Participants there was a significant increase in those describing the campaign as 'very' necessary as opposed to only 'somewhat' necessary from Wave 2 to Wave 3.

Figure 3.34: Prompted impressions of the campaign (Online W1-W3)



Online Y4. Thinking about the campaign as a whole, how much would you say it is ...?
Base: (All respondents), W2 Gen. Pop. n=528; W3 Gen. Pop. n=531

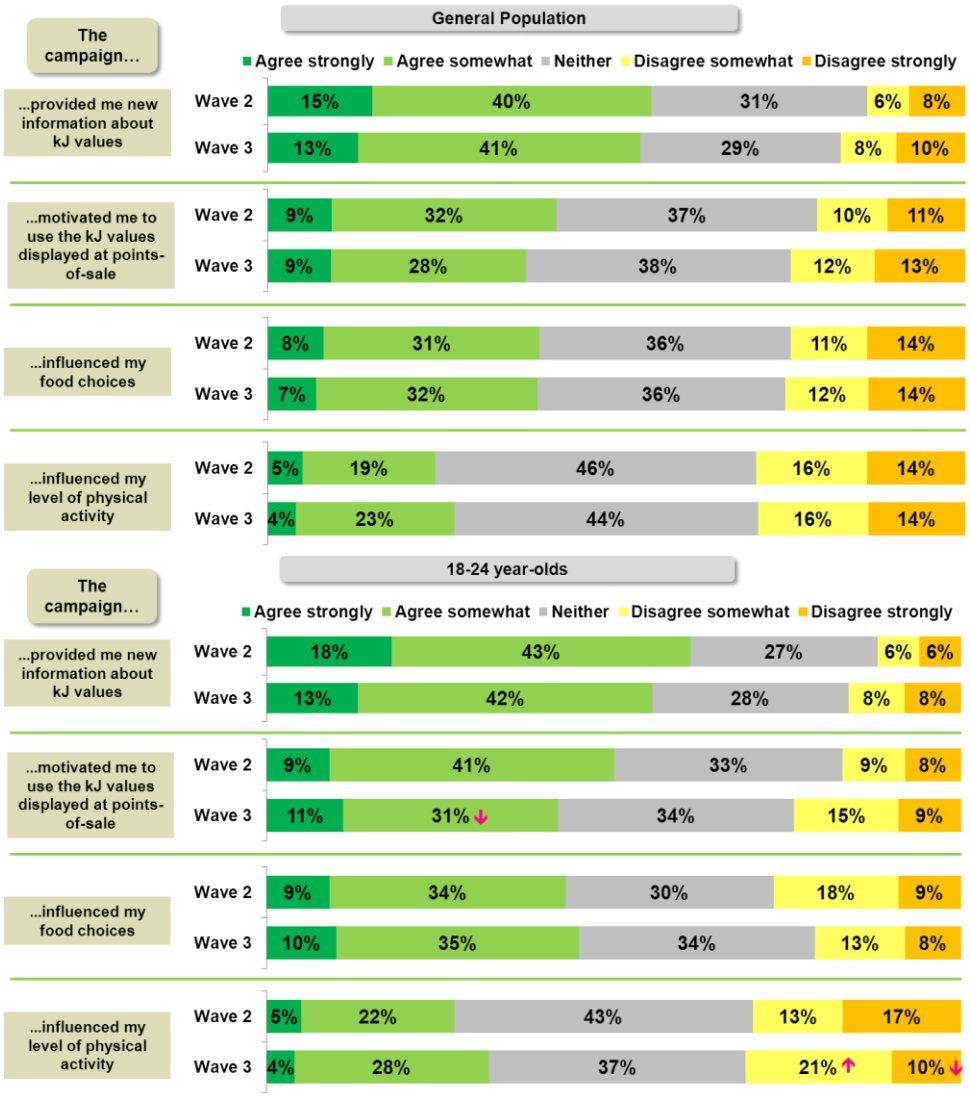
↑ / ↓ Significantly Higher / Lower than proportion at Wave 1 (95% ± confidence level)

3.5.7 Reported impact of the campaign

Finally, when prompted about the impact of the campaign, participants were most likely to agree that it had **provided them with new information on kilojoule values.** This was followed by mentions that it had motivated them to use kJ values displayed at the point of sale and that it influenced their food choices. Fewer participants agreed that it would influence their level of physical activity.

Order of agreement was consistent across General Population Online Participants and 18 to 24 year old Online Participants although younger participants were slightly more likely to agree that the campaign had influenced them.

Figure 3.35: Reported impact of the campaign (Online W1-W3)



Online Y5. Here are some things other people have said about this campaign. How strongly do you agree or disagree with them?
Base: (All participants), W2 Gen pop n=528; W3 Gen pop n=531, W2 18-24 yr olds n=213; W3 18-24 yr olds n=206

APPENDIX - METHODOLOGY

In order to more fully address the research objectives a multi-method approach was taken with a qualitative phase prior to the pre-intervention and post intervention waves of the quantitative research. The resultant findings from the qualitative phase fed directly into the construction of both the online and intercept questionnaire. The survey design enables the collection and identification of benchmark measures related to consumer awareness, understanding, use and behaviour and two subsequent waves of tracking of key measures and indicators to assess the influence and outcome of the legislation changes. Waves 1 and 2 are now complete, and Wave 3 is scheduled for September 2012.

A1. Developmental qualitative phase

The qualitative phase was exploratory in nature and principally designed to inform and develop the intercept and online survey questionnaires.

A1.1 Sampling and recruitment

Twelve in-depth interviews were conducted with consumers who had eaten food sourced from a fast or snack food outlet at least twice in the previous month. Recruitment was undertaken to achieve interviews with a broad spread of participants, on the basis of socioeconomic status, age and location, as indicated in the following table:

Table 4: Qualitative Sample Distribution

<table>
<tr><th colspan="5">Location vs. Age bracket</th></tr>
<tr><th></th><th>18-25 yrs</th><th>26-45 yrs</th><th>46+ yrs</th><th>Total</th></tr>
<tr><td>Sydney Inner</td><td>1 x low income</td><td>1 x high income
1 x mid income</td><td>1 x high income</td><td>4 depths</td></tr>
<tr><td>Sydney Outer</td><td>1 x mid income</td><td>1 x low income</td><td>1 x mid income
1 x low income</td><td>4 depths</td></tr>
<tr><td>Newcastle</td><td rowspan="4">1 x high income;
1 x low income</td><td rowspan="4">1x high income</td><td rowspan="4">1 x mid income</td><td>1 depth</td></tr>
<tr><td>Cessnock</td><td>1 depth</td></tr>
<tr><td>Maitland</td><td>1 depth</td></tr>
<tr><td>Lake Macquarie</td><td>1 depth</td></tr>
<tr><td>Total</td><td>4 depths</td><td>4 depths</td><td>4 depths</td><td>12 Depths</td></tr>
</table>

Other key quotas were placed on the twelve interviews to ensure there was representation from a diverse spread of the NSW population, including:

- Gender (6 male, 6 female),
- Body Mass Index Scores (4 'Healthy' Weight, 4 'Overweight', 4 'Obese'),
- Living arrangements (a mix of those living alone & living with others), and

- Cultural background (a mix with a maximum of 10 who describe themselves as Anglo-Celtic).

Recruitment of participants was conducted by a professionally accredited recruitment agency and undertaken principally by telephone. To aid this process, TNS researchers provided a verbal and written briefing, including recruitment specifications and screening questions.

A1.2 Fieldwork

Interviews were conducted face-to-face by TNS researchers at suitable venues for participants (typically at home / work or another neutral location). Each interview lasted approximately one hour, with researchers using an interview guide developed in conjunction with the NSW Food Authority to help frame and direct the discussion. The areas of enquiry included:

- Consumers' understanding of energy and kilojoules,
- Consumers' understanding of other nutritional content,
- Consumers' understanding of average daily requirements of energy and kilojoules,
- Consumers' attitudes, beliefs and diet motivation regarding energy and kilojoules, fats and salts,
- Consumers' attitudes towards the consumption of fast food and different types of fast food,
- The 'path to purchase' i.e. the decision making process made by consumers before, during and after fast food purchase and consumption,
- Attitudes to menu labelling at fast food outlets, and
- The perceived impact of energy labelling on fast food choices.

Participants were provided with $80 upon completion of the interview in gratitude for their time and input.

A2. Quantitative intercept survey

The primary objective of the intercept survey was to obtain a baseline measure on the quantity of kilojoules, salt and fat consumed by patrons of standard food outlets. Shorter in length than the online survey, the design of the intercept questionnaire therefore focused on recording the standard food items which patrons had bought for themselves during their visit to the outlet. Follow up questions concerned fast food / drink purchase behaviour, awareness and understanding of nutritional labelling at the outlet, and the impact of this on purchase decisions. Fundamentally, the intercept survey employed a targeted and specific approach, the frame of reference for participants being their experiences in one particular outlet at one particular point in time.

A2.1 Sampling approach

1) Outlet sampling points

The intercept methodology employed a purposive, stratified cluster sampling approach, operating within the confines of study design and budget parameters. Essentially, this was developed to minimise bias or skewing of data as a result of demographic and situational factors, such as the socio-economic status of localities, locations (metro/rural), fast food / drink chains, and outlet types. In total, fourteen outlets were sampled which provided a diverse spread of sampling points in relation to demographic and situational factors. These are shown in the following table:

Table 5: Outlet sampling points

Sample point	Outlet Type	Location	NSW LGA Socio-economic status
1	Burger 1	Metro (Inner Sydney)	1st or 2nd SES quintile
2	Burger 2	Regional (Hunter region)	1st or 2nd SES quintile
3	Burger 3	Metro (Inner Sydney)	1st or 2nd SES quintile
4	Burger 4	Metro (Outer Sydney)	4th or 5th SES quintile
5	Chicken 1	Metro (Outer Sydney)	4th or 5th SES quintile
6	Chicken 2	Metro (Outer Sydney)	4th or 5th SES quintile
7	Chicken 3	Regional (Hunter region)	3rd SES quintile
8	Chicken 4	Metro (Inner Sydney)	1st or 2nd SES quintile
9	Ice Cream 1	Regional (Hunter region)	1st or 2nd SES quintile
10	Ice Cream 2	Metro (Outer Sydney)	3rd SES quintile
11	Pizza 1	Metro (Inner Sydney)	4th or 5th SES quintile
12	Sandwich 1	Metro (Outer Sydney)	4th or 5th SES quintile
13	Beverage 1	Metro (Inner Sydney)	1st or 2nd SES quintile
14	Beverage 2	Metro (Outer Sydney)	3rd SES quintile

In summary, this sampling approach included the following distribution (along with accompanying rationale for this distribution):

Sample factor	Rationale
Outlet type: 4 x burger 4 x chicken 2 x ice cream 1 x pizza 1 x sandwich 2 x beverage	A greater emphasis was placed on 'burger' or 'chicken' outlets to reflect the concentration of fast food consumption in these outlet types. It was also anticipated that energy purchase measurement would be straightforward in such outlets due to the high proportion of standard food items sold. Fewer 'pizza' and 'sandwich' outlets were selected in part due to the higher proportion of non-standard food items available to customers making measurement more complex. Furthermore, most pizza purchases were considered to be made online and therefore an intercept survey of this market would require greater resources. Resources therefore were better targeted towards those where foods are ordered at the outlet. 'Ice Cream' and 'Beverage' outlets have been sampled to ensure coverage of these significant markets.
Chain: 2 x McDonald's 2 x Hungry Jack's 1 x KFC 1 x Red Rooster 1 x Nandos 1 x Oporto 2 x Wendy's 1 x Dominos 1 x Subway 2 x Gloria Jean's	A spread of fast food businesses were included in the survey with the principle fast food chains included where possible. McDonald's and Hungry Jack's represent the 'burger' outlets due to their high market share. Four different 'chicken' brands were included to represent the broader share of chains in this market. The 'pizza' market was represented by Dominos, the largest pizza chain in Australia. Subway represented the 'sandwich' market due to it being the largest speciality sandwich chain in Australia. The 'ice cream' market was represented by the popular ice cream chain, Wendy's. Gloria Jean's represented the 'beverage' outlets, being Australia's largest specialty coffee retailer.
Location 5 x Inner metro 6 x Outer metro 3 x Regional NSW	A good spread of metro and regional outlets in NSW was ensured. This encompassed both Inner Sydney LGAs (Sydney City (2), Marrickville, Randwick & Canterbury), Outer Sydney LGAs (Fairfield, Blacktown, Auburn, Campbelltown. Bankstown & Parramatta) and Regional NSW suburbs (Lake Macquarie (2) & Maitland)
Socio-economic status 6 x 1st or 2nd quintile 3 x 3rd quintile 5 x 4th or 5th quintile	The NSW LGA socio-economic status index (developed by the NSW Health Department) has been used to ensure that outlets selected were located in LGAs with a range of socio-economic profiles.

While the sampling approach outlined for outlet selection was carefully designed to encompass a range of demographic and situational profiles in NSW, it should be noted that this does not necessarily provide a truly representative picture of outlets and population profiles in the state. However, more important to the validity of results from the intercept survey is the conduct of research at the same sampling points in

subsequent Waves of research, so that results can be compared across Waves without being influenced by a different sampling scheme.

2) Participant sampling approach

Participants were recruited to take part in an interview after they had finished their meal and / or made their purchase and were leaving the outlet. Sampling within each outlet was undertaken using a randomised 'eyes up' approach utilised by interviewers on-site. This involved interviewers being required to look down, look up and approach whoever is directly in their line of sight. This ensures that no bias is introduced by interviewers (e.g. only approaching potential participants whom they feel will be more likely to participate).

Given the purposive nature of the sample approach to the intercept survey, no quotas were imposed on participant type, with data collected representing that of a random sample of customers at each site. The only limitations were that participants were to be aged over 16 years of age, and that only one person per family or peer group was interviewed.

A2.2 Survey design and fieldwork

The survey questionnaire was developed with input from the qualitative phase and in collaboration with the NSW Food Authority. This comprised a number of questions and response codes related to the intermediate evaluation outcomes, structured around the following themes:

- Products purchased and consumed on site at this visit,
- Influences on purchase decision,
- Awareness, readership, and impact of nutritional information at outlet,
- Salience of considering nutritional content when making purchase decisions,
- Understanding and estimation of kilojoules consumed, and
- Demographic information.

The approved questionnaire was administered via pen and paper at each outlet by a trained and experienced interviewer from National Field Services (NFS). Interviewers received a briefing and instruction prior to commencing fieldwork from TNS researchers and fieldwork managers at NFS, who were also available during the fieldwork period to address any problems or concerns. The questionnaire was also subject to a small period of cognitive and pilot testing, prior to the commencement of the main fieldwork stage.

For Wave 1, fieldwork was conducted between 7 September and 9 October 2011 with a total of n=815 participants.
For Wave 2, fieldwork was conducted between 20 April and 18 May 2012 with a total of n=807 participants.
For Wave 3, fieldwork was conducted between 27 August and 23 September 2012 with a total of n=805 participants.

For all three Waves, the survey took an average of 7 minutes to complete.

A2.3 Data processing and analysis

Completed questionnaires were processed at NFS, with data validation checks made on the paper questionnaires before data from these were entered. Further quality and logic checks were made on at least 10% of surveys entered.

A significant component of processing was dedicated to coding of food items purchased and consumed to derive kilojoule (and other nutritional item) content. Items consumed that were recorded during the interview were cross-referenced to data provided by the NSW Food Authority listing standard menu items at each outlet and their nutritional content. While not all items were able to be coded, due to absent information on the nutritional content of these, the majority of participants (approximately 80%) were assigned with total figures for kilojoules, sodium, sugar and fat consumed at their visit to the outlet. It should be noted that participants for whom these measures could not be derived are excluded from any calculations of average intake made in this report.

Following this process, data tabulations and raw data in SPSS were produced, validated, and amended where necessary. The data tabulations included a series of analysis breaks, and included significance testing (at the 95% confidence level).

A3. Quantitative online survey: general population

An online survey was developed to obtain key baseline measures on fast food and drink purchase behaviour, awareness and understanding of nutritional information and their influence on purchase decisions, and feedback about the initiative and likely impact on future food choices. Essentially, this research component was used to provide overall 'population measures' of consumer awareness and understanding, without the specificity of a particular experience at a particular point in time as measured in the corresponding intercept survey.

A3.1 Sampling approach

The sample frame was sourced through the MyOpinions database, one of Australia's largest panels of research participants. Importantly, panelists are restricted from the number of surveys they can complete and sampling of the panel is conducted in a controlled manner to ensure participants are representative of the population required. For this survey, NSW residents were sampled and an initial screening element of the survey questionnaire was conducted to ensure they were in scope. This included the requirement that they had purchased from at least one of the standard food outlets (shown in a list presented to participants) in the last month. Participants were also screened from the survey if they were younger than 16 years or did not reside in NSW. Minimum quotas were also set on gender, age, and location (metro / regional), to ensure a representative spread of participants.

A3.2 Survey design and fieldwork

A hard copy questionnaire was developed on the back of the qualitative phase and in collaboration with the NSW Food Authority. This comprised a number of questions and response codes related to the intermediate evaluation outcomes, structured around the following themes:

- General purchase and consumption practices and behaviours,
- Awareness, use, understanding and impact of (any) nutritional information at outlets,
- Use and influence of menu in food purchase decisions,
- Confidence in understanding of nutritional information,
- Awareness and understanding of kilojoules and other nutrition indicators,
- Reaction to proposed menu changes and perceived future impact on behaviour, and
- Demographic information.
- (Waves 2 and 3 only) Prompted recall of consumer communications campaign elements

The approved questionnaire was programmed for the online format and tested by TNS researchers prior to fieldwork commencing. Initially a small pilot test (n=50) was

completed to ensure accurate functionality and logic of the online questionnaire, prior to full launch.

For Wave 1, fieldwork was completed between 7 September and 9 October 2011 with a total of n=506 participants. The survey took an average of 15 minutes to complete.

For Wave 2, fieldwork was completed between 20 April and 18 May 2012 and comprised 528 NSW residents. The survey took an average of 22 minutes to complete (due to incorporation of communications pre- and post testing component).

For Wave 3, fieldwork was completed between 15 October 2012 and 22 October 2012 and comprised 531 NSW residents. The survey took an average of 22 minutes to complete.

A3.3 Data processing and analysis

In order to provide a basis for comparison in future Waves of the survey, the data was weighted to be representative of the NSW population aged 16 or older, using ABS population counts for age, gender and location (metro / regional). The weighting scheme is shown in the following table:

Table 6: Weighting structure

		Target %	Weight
Location	NSW Metro	63	1.000
	NSW Regional	37	1.000
Gender	Male	50	1.163
	Female	50	0.877
Age	16-25 years old	17	1.214
	26-45 years old	36	1.125
	46 years old and above	47	0.855

The same weighting scheme was applied to Waves 1, 2 and 3 of the survey, essentially providing an identical sample population in terms of demographic and location from which to measure trends and change. Validation was undertaken on unweighted and weighted data, with negligible impact observed on data as a result of weighting.

Open ended verbatim comments from the survey were reviewed and grouped into themes or codes, providing a numerical estimation of the type of comments provided by participants. Other logic checks, such as missing data and correct skips and filters, were also made prior to further data processing. Following this, data tabulations and raw data in SPSS were produced, validated, and amended where necessary. The data tabulations included a series of analysis breaks, and included significance testing (at the 95% confidence level) between subgroups (e.g. males and females).

A4. Quantitative online survey: 18-24 year olds

In late 2011, the NSW Food Authority secured further funding to support the implementation of the Fast Choices legislation through a communications campaign targeting NSW consumers. The aim of the campaign is to raise awareness of energy and kilojoules among consumers and further allow them to better understand their personal kilojoule requirements.

The stated objectives of the campaign are as follows:

- To build awareness that menu displays show energy in terms of kilojoules
- To build awareness of the average adult daily intake of 8,700 kilojoules
- To build awareness of individual kilojoule requirements to maintain a balance of energy and activity, maintain a healthy weight, and how the requirements can vary depending on age, activity and other factors
- To provide access to more information using website, mobile site, mobile app, Facebook page and app. This will include information about how many kilojoules consumers require each day and to support balanced choices

Additional research was therefore required to measure the effectiveness of the consumer campaign, and, baseline measures needed to be established for the target audience of young people aged 18-24 years.

A4.1 Sampling approach

As for the general population survey, the sample frame was sourced through the MyOpinions database. For this survey, Greater Sydney residents were sampled and an initial screening element of the survey questionnaire was conducted to ensure they were in scope. This included the requirement that they had purchased from at least one of the standard food outlets (shown in a list presented to participants) in the last month. Participants were also screened from the survey if they were under 18 or over 24 years or did no longer reside in Greater Sydney. No quotas were set.

A4.2 Survey design and fieldwork

A hard copy questionnaire was developed in collaboration with the NSW Food Authority. This was based on the existing general population survey, and expanded to incorporate specific pre- and post measures relating to the campaign. This included spontaneous and prompted awareness of campaign elements, as well as reported impact on attitudes and future behaviour.

The approved questionnaire was programmed for the online format and tested by TNS researchers prior to fieldwork commencing. Initially a small pilot test (n=20) was completed to ensure accurate functionality and logic of the online questionnaire, prior to full launch.

For Wave 1, fieldwork was undertaken from 20 to 29 February 2012, one week immediately prior to launch of the campaign, and with a total of n=217 participants. The survey took an average of 15 minutes to complete

For Wave 2, fieldwork was completed between 20 April and 18 May 2012, shortly after campaign launch, and comprised n=213 participants. The survey took an average of 18 minutes to complete (due to incorporation of a communications pre- testing component).

For Wave 3, fieldwork was completed between 16 October 2012 and 25 October 2012, shortly after campaign launch, and comprised n=206 participants. The survey took an average of 22 minutes to complete (due to incorporation of a communications post testing component).

A4.3 Data processing and analysis

The data was weighted, but only on gender. The same weighting scheme was applied to Waves 1, 2 and 3 of the survey to maximise comparability.

Open ended verbatim comments from the survey were reviewed and grouped into themes or codes, providing a numerical estimation of the type of comments provided by participants. Other logic checks, such as missing data and correct skips and filters, were also made prior to further data processing. Following this, data tabulations and raw data in SPSS were produced, validated, and amended where necessary. The data tabulations included a series of analysis breaks, and included significance testing (at the 95% confidence level) between subgroups (e.g. males and females).