Department of Industry, Innovation and Science

Understanding Consumer Preferences Towards Measurement Markings on Fast Moving Consumer Goods Product Packages

Research Report

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**ORIMA Research would like to thank and acknowledge the important contributions of our partners from Mint Research and Nulink Analytics to the design and conduct of this study.**



***This project was conducted in accordance with the international quality standard   
ISO 20252 and the Australian Privacy Principles contained in the Privacy Act 1988.***

# Executive Summary

## Background and Source of Data

Background

The Department of Industry, Innovation and Science (the Department) commissioned ORIMA Research to investigate the importance and usage of the measurement marking (MM) on packaged Fast Moving Consumer Goods (FMCG) products as part of wider agenda to reduce potentially unnecessary Government regulation.

The overarching research issue was to understand how important the MM is, in both an absolute sense and relative to other label components, and understanding consumer responses to differential formats, locations, and sizes of the MM across a series of typical FMCG products.

The question at the core of this study was if there was a change in orientation / positioning, what would be the impact (if any) to the consumer? The answer to this question would provide the Department with information to support decision-making around whether to adopt a policy option to retain the status quo regulation framework, or move to a principles-based regulatory approach.

Source of Data

To address these questions, ORIMA undertook two research stages:

1. A series of **25 x 15 minute in-store qualitative intercept interviews** with consumers in the midst of a purchase decision at one of four retail environments (supermarkets, pharmacies, hardware stores and liquor stores); and
2. A 15 minute **online quantitative survey of n=1,593 respondents**, representative of the demographic profile of the general population.

Both stages of the research were designed to measure the relative importance of the MM on the front of packaged products, the level of consumer detriment that could be experienced and consumer acceptance if the MM format, location or size was allowed flexibility on product packaging.

The purpose of the qualitative stage was to inform the design of the questionnaire, which was the primary research stage. The qualitative research made a number of important contributions to the design, including identifying suitable product examples to use in the survey, modifying our conceptualisation of the important sentiment measure from “preference” to “acceptance”, and the importance of factoring in-store promotions and shelf labelling into our methods of assessing the use and value of the MM.

The survey tested the impact of varying up to three dimensions of the MM format – front / back placement, large / small font size and horizontal / vertical alignment. Eight different positions tested permutations of these dimensions. A measure of *net consumer benefit* was developed (acceptance minus derived confusion) to demonstrate differences between variations in the MM position. While this indicator did not take into account the overall value of the MM compared to other types of information, it allows us to examine how different variations of the MM placement might work.

Significant focus was given to minimising consumer response bias that can often be a product of self-reported responses. For metrics such as importance and confusion, *deriving* these provides more objective measures that are indicative of real world interactions with the MM, compared to asking these in a self-reported manner. The survey conducted these more objective and indirect tests first, before concluding with more traditional ‘conscious’ survey elements that are more comparable with other survey results on this topic.

## Key Findings

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| **Relative importance of the Measurement Mark (Test 1)**  Overall the MM was not considered among the most useful type of information that could be placed on the front of packages, ranking equal 6th of the eight types of information tested. Overall 10% of respondents considered it to be most useful piece of information.  For food products, country of origin (21%) and expiry / use by date (16%) were the most useful pieces of information. For non-food products health (nutrition) claims (20%) and allergen information (16%) were the most useful.  Younger respondents and male respondents were slightly more likely to consider the MM useful. |

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| **Confusion associated with changes in MM location, orientation and size (Test 2)**  Consumer ‘confusion’ was assessed by exploring how often respondents were able to correctly identify that a sale product did not represent better value for money than one not on sale. Performance on this test was only moderate, suggesting that even in the status quo position the MM is not a highly effective tool for this purpose. The benchmark to examine whether consumer confusion was increased by moving the MM was 56% of respondents who “correctly” chose the non-sale option for a food product, and 61% who did so for non-food products.  For food products, only one test position of the MM resulted in significantly poorer performance than the status quo position (position 6 - front, smaller, vertical), and the back of pack positions actually performed better. For non-food products the back of pack positions resulted in significantly poorer performance however, suggesting that the MM may be sought out and used differently in the two categories.  For non-food products in particular, performance deteriorated the more of the three dimensions were changed from the status quo position. |

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| **Acceptance of flexibility in the MM display (Test 3)**  None of the eight variations in MM position was felt to be “unacceptable and in need of government regulation to avoid” by more than 25% of respondents. This is consistent with the qualitative interview results, where participants indicated that rather than being unacceptable, a product that made it hard to find the MM simply put itself at a competitive disadvantage.  Absolute acceptance of variations to the MM ranged from 74-92% acceptance across food products and 64-90% for non-food products; with the status quo position achieving the highest proportions of acceptance.  When looking at acceptability relative to the benchmark (status quo), there was an obvious decline in ratings of acceptability for MM displays as the number of dimensions changed from the status quo position increased, across both food and non-food products.  Younger and middle-aged people were more likely to be accepting of flexibility to the MM display, as were those who do not often look for information on product labels, and pay lower amounts of attention to product labelling. Older people indicated a greater desire for regulation, despite having rated the usefulness of the MM as amongst the lowest in Test 1. |

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| **Net consumer benefit associated with different MM displays (Test 2 and 3)**  “Net benefit” based purely on the variations in confusion (Test 2) and acceptability (Test 3) associated with each position showed that overall, the status quo position scores higher than any of the variations tested.  For food products, due to their better performance on Test 2, the back of pack variants had the highest net benefit scores other than the status quo. For non-food products there was no one factor that seemed most related to net benefit.  Overall, none of the three dimensions by which the MM position varied emerged as consistently more critical. Rather, there is a general negative correlation between the number of dimensions changed and the net benefit to the consumer – that is, as the number of dimensions changed increases, the net benefit decreases. |

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| **Conscious opinions about the MM (Final direct questioning)**  When directly asked, the MM is considered *at least moderately useful* as a way of determining value for money when choosing between product options by 78% of respondents, about the same as unit pricing (81%). However, 53% thought that unit pricing was *very* *useful* compared to 40% for the MM.  68% of respondents felt that government regulation is needed for the orientation and position of the MM. These results are quite dissimilar to Test 3, where a quarter of respondents or less felt that any specific example of alternative formatting of the MM required regulation to avoid. This reinforces that people do feel the MM is not something that can be totally unregulated – but suggests that the variations tested do not cross a threshold at which most people feel it has been compromised to the point where it is no longer usable.  A majority of respondents thought it was *at least moderately important* that the MM remain on the front of packs (67%), at least 2mm high (67%) and horizontal (58%). Of the three, remaining horizontal was slightly less important. |

## Summary and Conclusions

The results from parts of this study were broadly consistent with those from other surveys on this topic, which have typically shown that **when Australian consumers are prompted to think about the measurement marking (MM), they consider it to be an important part of product labelling warranting Government regulation.**

However, the results from the more indirect and derived tests in the survey (and also the qualitative interviews) suggest that **in practice the MM plays a more intermittent and less important role in consumer decision making – and that people may overstate its importance in traditional direct questioning surveys.** It is possible that they are basing those prompted responses more on their occasional “high need” moments rather than more typical behaviours. This difference between conscious, rational self-analysis and actual observed behaviour is very common in social psychology, and avoiding this was a key design consideration in the development of this study.

The differential between the stated importance results for some direct questions and the derived importance results from the indirect questioning is an extremely important learning which was deliberately tested here, and **will be important to consider when anticipating how the community might respond to any changes in regulations around the MM.** The results from here and other surveys suggest consumers will respond to any deregulation of the MM based on a level of perceived importance that might not be matched in their actual behaviours and consumer experiences, and a high level of supporting communications and explanations would be advantageous.

When directly asked, **a majority of respondents to the survey believe that Government regulation is needed for the format and placement of the MM (68%).** However, in the indirect testing of the absolute and relative importance of the MM:

* **Only 10% of respondents indicated the MM was the most useful of eight different types of information that could be placed front of pack**, and that other information was considerably more useful for both food and non-food products.
* When confronted with a typical consumer choice of whether to buy a product on special or one not on special where the only real variation was pack size and cost, **benchmark performance in “correctly” choosing was only moderate even with the status quo MM** placement, and only deteriorated significantly for some placements.
* Of the eight variations in MM placement tested across six products in both food and non-food categories, **no more than 25% felt that any of the placements were *unacceptable and in need of Government regulation to avoid***.

**Overall the study suggests people feel the MM is too important to be totally unregulated – but that the variations tested do not cross a threshold beyond which they feel the MM has been compromised to the point where it is no longer usable.**

In terms of net benefit or detriment through changes to regulation of the MM, **the detriments appear primarily in terms of expectation and sentiment**. People clearly feel the MM is important, and their expectation is that it be protected to some extent. The qualitative interviews however showed little ‘passion’ from consumers about the MM, indicating that on those occasions when they wanted to use the MM that they would either make the effort to find it – or if a particular product made it hard to find, simply choose an alternative. Actual consumer ‘performance’ appeared to deteriorate little as a result of the variations tested (noting that in the survey, respondents were able to see both the back and front of pack simultaneously, which is not usually the case in a real situation).

**Older consumers seem the most likely to react negatively to relaxing the MM regulations** – though at the same time they were a group who rated the MM relatively low in terms of relative usefulness as front of pack information in Test 1.

Some of the MM placements tested for food products actually resulted in *better* performance on the value for money test (Test 2) – and perhaps counterintuitively these were all positions on the back of the pack. It is possible that for food products, respondents were willing to make a bit more effort to find the MM in order to assist their decision and having done so then processed the information more effectively. This is only speculation at this point and needs further research to explore, but at face value the results here **suggest there could potentially be some *benefit* to consumers** under some circumstances of the MM requiring more effort to locate. Additional benefit may be experienced by consumers from having the more useful types of information on the front of pack (Test 1).

Three dimensions of variation were tested in the survey – front / back placement; large / small fonts; and horizontal / vertical orientation. **None of these three dimensions consistently emerged as clearly more or less critical than the others,** and in general the obvious version was preferred for each dimension (ie: front, large, horizontal). However, what was observed was that **the *more* of these dimensions that were varied from the status quo position, the poorer the MM performed across the range of tests and stated preferences.** This reinforces the conclusion that there probably is a threshold at which a majority of respondents would feel that a MM position was not acceptable – but in this research we did not appear to reach that point.

# Source of Data

## Research Objectives

This study was commissioned by the Department of Industry, Innovation and Science to inform a review of the measurement marking (MM) on products as part of a wider deregulation agenda. The MM is the part of a product label that contains its weight or volume, and currently there are very specific regulations about its placement, size and presentation. The review is considering the possibility of moving to a more ‘principles-based’ approach which would potentially provide businesses with more flexibility about the exact format of the MM.

The research objectives of the study were:

1. To understand the relative **usage** and **importance** of all labelling components (including the MM) when making a purchase decision in situ (e.g. supermarkets, bottle shops, pharmacies, and hardware stores) across a series of FMCG products (pre-packaged foods and beverages, alcoholic beverages, cosmetics and aerosols);
2. To understand relative to other labelling elements, the **importance of the location**, **size** and **orientation** of the MM (currently on the primary display panel (front) on these products);
3. To determine the **levels of consumer interest**, **concern** and **potential confusion** that may be associated with a change in location, size and orientation of the MM;
4. To explore any **differences in consumers’ responses** to MMs across different products / ranges / price points;
5. To investigate how **aligned** the minimum labelling requirements (size, position) are with **consumer preferences**, expectations, confidence and trust.

In discussions with the Department at the outset of the project, a particular focus of the research was determined to be understanding how modifying the size, placement and orientation of the MM might impact consumers, and be responded to by consumers.

## Methodology in Brief

The research comprised two main research stages.

1. The initial research stage involved **25 x 15 minute in-store qualitative interviews** with consumers in the midst of a purchase decision at a supermarket, pharmacy, hardware store or liquor store. The purpose of this qualitative research stage was to inform the subsequent quantitative research stage by providing realistic in-situ information regarding the most important factors to consumers when making product selections and purchase decisions.

The qualitative research made a number of important contributions to the design, including identifying suitable product examples to use in the survey, modifying our conceptualisation of the important sentiment measure from “preference” to “acceptance”, and the importance of factoring in-store promotions and shelf labelling into our methods of assessing the use and value of the MM.

1. This was then followed in early November 2015 by a national **15 minute online quantitative survey with n=1,593 respondents,** representative of the demographic profile of the general population. The core of the quantitative survey comprised three tests to determine:
   1. **Test 1: The importance of the MM on the front of packaged products, relative to alternative front of pack information**. This test used a MaxDiff design, which involved respondents viewing selections of eight different possible pieces of information on the front of pack (FOP) and identifying which one in each combination was most and least useful. The analysis then looked at the relative importance of the MM compared to these other types of information.
   2. **Test 2: The level of confusion and poor purchase decisions that could result from differential MM location as per the proposed principles-based approach**. This test involved respondents comparing two product options and indicating which one they would buy. The product pairs are matched other than on pack size and cost, meaning that the MM is essential for determining the best value “correct” choice. Performance on the status quo MM position established a benchmark against which performance of other MM positions could be objectively determined.
   3. **Test 3: Levels of acceptability associated with differential MM location, as per the proposed principles-based approach**. In this test each respondent saw eight different variations in MM position across two products. They were asked to provide a reaction to each position, one of which was to say that they found the positon unacceptable and in need to government regulation to avoid. Again, differential performance compared to the status quo was used to determine performance.

These tests were intended to be more natural and unprimed for respondents. They used visual stimuli (product mock-ups) showing variations of packaging that was consistent with current MM regulations and potential variations under the principles-based approach. These tests were conducted at the start of the survey before respondents were aware of the subject of the survey, and resulted in derived measures of importance and accurate decision making. At the end of the survey, more traditional survey questions were included to measure respondents’ conscious and rational reactions to the subject – yielding results that are more directly comparable to other surveys on this subject.

The rationale for the approach taken in each of these tests, as well as details about the specific test designs can be seen in Appendix A: Technical Appendix-E. The questionnaire itself can be seen in Appendix K.

The sample for the survey was structured around age, gender and geographic quotas to provide a good cross section of the community; and post-hoc statistical weighting was conducted on the final sample to correct some minor variations from ABS population statistics[[1]](#footnote-1).

All respondents to the survey were members of an online research panel, and as such some caution needs to be taken when extrapolating the results to the full Australian community. However, there are no *a priori* reasons to presume that the views of people on a research panel should systematically vary from the wider community on this topic.

Details of the raw sample can be seen in Appendix I.

# Results

The survey was designed around two sections:

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| **Section one** | Consisted of three ‘tests’ using visual stimuli to derive the relative importance of the measurement marking (MM) and the impact of altering it. These tests were deliberately conducted at the start of the survey, so that respondents were unaware of the focus on the MM, allowing their responses to be more natural, minimising bias.  The visual stimuli consisted of pack mock-ups of three food [Tomato Sauce, Cheese and Potato Chips] and three non-food [Insect Spray, Spirits and Sunscreen] products that were identified as prototypical occasional purchases – ones that people are familiar with, but not so regular as to be automatic (see examples below).  N:\Department of Industry\2015\#2949 Measurement markings (P1655)\4 Questionnaire & Discussion Guide\Online Quant\Stimulus\Test 2\Cheese_Pair 2_special.jpg  The qualitative research suggested that these were the types of situation where the MM might be most likely to be used. Each respondent saw one food product and one non-food product throughout the survey. |

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| **Section two** | Used a more traditional survey format to measure more considered and conscious opinions and preferences. |

The results from these two sections are presented in sequence below.

The **results from Section 2 were broadly consistent with those from other surveys on this topic**, which have typically shown that people overtly consider the MM to be an important part of labelling that consistent with requiring Government regulation.

However, the **results from the more indirect and derived tests in Section 1 (and also the qualitative interviews) suggest that in reality the MM plays a more intermittent and less important role in consumer decision making – and that people may overstate its importance in traditional direct questioning surveys**. It is possible that they are basing those responses on their occasional highest needs, rather than more typical needs and uses. This disconnect between conscious, rational self-analysis and actual observed behaviour is very common in social psychology, and one of the factors that was a key design consideration in the development of this study.

The apparent inconsistency between the stated importance results for some direct questions and the derived importance results from the indirect questioning is not a weakness of this study, but rather an extremely important learning which was deliberately pursued. This disconnect will be important to consider when interpreting these results and anticipating how the community might respond to any changes in regulatory requirements around the MM.

## Test 1: Relative Importance of the MM compared to Other Front Of Pack Information

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| Test 1 comprised a MaxDiff design to derive relative importance of the MM compared to other front of pack information. Deriving this provides an objective measure that cannot be obtained by asking the question consciously.  For one food product and one non-food product, respondents were exposed to a series of five tasks. Each task contained four front of pack product image mock-ups, each displaying a different piece of information. For each task respondents were asked which pack was the most useful and which was the least useful in deciding what to buy.  The MaxDiff design is carefully balanced across products, pack variants and respondents to ensure all combinations are equally frequently tested without individual respondents having to do an unreasonable number of comparisons. The analysis then combines all the data into an integrated data set for analysis.  Analysis of these ratings revealed the relative importance of each of the labelling elements across the series of mock-ups. |

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| **Relative importance of the Measurement Mark**  Overall the MM was not considered among the most useful type of information that could be placed on the front of packages, ranking equal 6th of the eight types of information tested. Overall 10% of respondents considered it to be most useful piece of information.  For food products, country of origin (21%) and expiry / use by date (16%) were the most useful pieces of information. For non-food products health (nutrition) claims (20%) and allergen information (16%) were the most useful.  Younger respondents and male respondents were slightly more likely to consider the MM useful. |

Overall, Test 1 showed that the MM is not widely considered the most useful type of information that could potentially be shown on the front of packages.

There were no strongly dominant pieces of information, with each of eight information options being considered “most useful” by between 8% and 17% of respondents. However, the MM was ranked equal 6th out of eight at just 10%.

Nutrition content claims / alcohol content / safety claims and country of origin information were most widely considered to be most useful, at 17% and 16% respectively.

**Figure 1: Usefulness of packaging elements (all product types combined)**

**QC1.** Of the FOUR product packs shown below, which do you think is MOST useful, and which is LEAST useful in deciding what to buy?

**Base:** All respondents n=1,593

There were some differences in perceptions of usefulness across food and non-food categories – but the MM remained relatively low in the list of important pieces of information for both categories (at 11% and 9% respectively).

For food products, country of origin (21%) and expiry / use by date (16%) were the most useful pieces of information. For non-food products, alcohol content / safety claims (20%) and allergen information (16%) were the most useful.

**Figure 2: Usefulness of packaging elements by food and non-food products**

**QC1.** Of the FOUR product packs shown below, which do you think is MOST useful, and which is LEAST useful in deciding what to buy?

**Base:** All respondents n=1,593

Males and younger respondents were more likely to consider the MM useful for both food and non-food categories. Family status and work status variations were also seen, but as these characteristics are heavily related to age, it is likely that this is just reflecting the tendency for older people to rate the MM as less useful.

These significant differences between subgroups can be seen in tables at Appendix B: Test 1 (MaxDiff) Design and Details.

## Test 2: Confusion and Poor Choice related to Differential MM Display

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| Test 2 derived an objective measure of confusion associated with differential positioning and formatting of the MM. Test 2 tested respondents’ value for money calculations and ultimate purchase decisions (in the absence of unit pricing on shelves) across similar product pairs of different sizes, prices and promotions.  Each respondent was shown several pairs of product options and asked which they would buy. One product was always on sale, but the non-sale product always offered better value for money. As the only difference between the two options was pack size and price, it was assumed that for the majority of cases the value-for-money choice was the “correct” option (see example).  N:\Department of Industry\2015\#2949 Measurement markings (P1655)\4 Questionnaire & Discussion Guide\Online Quant\Stimulus\Test 2\Sunscreen_Pair 1_special.jpgN:\Department of Industry\2015\#2949 Measurement markings (P1655)\4 Questionnaire & Discussion Guide\Online Quant\Stimulus\Test 2\Sunscreen_Pair 1_376-500.jpgIn each category, the MM was shown on mocked up images of the same product type the respondent saw in Test 1. The MM was displayed in its current position in some comparisons and in a variety of different locations, angles and sizes. The difference in value between sale and non-sale products was carefully balanced to ensure equity across all facets of the test (see Appendix C).  The proportion of “correct” choices made when the MM was in the status quo position provides the benchmark ratio for correctly selecting the non-sale product. Any decline against this benchmark for any of the other MM locations demonstrates a decline in usefulness and / or an increase in ‘consumer confusion’ which can be attributed to the MM change.  Analysis of findings shows the threshold where changes to the measurement mark’s position or orientation become detrimental to the consumer, impairing their purchase decision. |

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| **Confusion associated with changes in MM location, orientation and size**  Consumer ‘confusion’ was assessed by exploring how often respondents were able to correctly identify that a sale product did not represent better value for money than one not on sale. Performance on this test was only moderate, suggesting that even in the status quo position the MM is not a highly effective tool for this purpose. The benchmark to examine whether consumer confusion was increased by moving the MM was 56% of respondents who “correctly” chose the non-sale option for a food product, and 61% who did so for non-food products.  For food products, only one test position of the MM resulted in significantly poorer performance than the status quo position (position 6 - front, smaller, vertical), and the back of pack positions actually performed better. For non-food products the back of pack positions resulted in significantly poorer performance however, suggesting that the MM may be sought out and used differently in the two categories.  For non-food products in particular, performance deteriorated the more of the three dimensions were changed from the status quo position. |

**Benchmark for induced consumer confusion:** When theMM was in the status quo position, onlya slight majority of respondents made “correct” (value for money) choices food product selections (56%) and non-food product selections (61%). These figures formed the benchmark ratio against which other displays of the MM have been compared to determine if performance is negatively impacted.

**Food Products**

Only one MM position performed significantly poorer than the status quo in test 2 for food products – position 6 (front, smaller, vertical).

Interestingly, for food products the back of pack positions resulted in more “correct” choices (5-14% higher than benchmark) compared to all front of pack displays (4-16% lower than benchmark). Three of the back of pack positions had significantly higher proportions of correct choices (P3, P4 and P7). It is not clear why this should have been observed, though it is possible that respondents took longer to seek out the MM for these positions, and then processed them more consciously.

**Figure 3: Correct and Incorrect product selection – food products**

Benchmark

**QD1.** Of the two products shown below, which one would you buy?

**Note:** Statistically significant differences between the positions of the MM (where a significant difference p<0.05 exists) is indicated using an arrow and P1-P8. E.g. Position 3, correct = 70% is significantly higher than P5 and P6

**Base:** All respondents saw two positions; sample n for each position ranged from 375-421

**Figure 4: Variations from paired test benchmark – food products**

**Non Food Products**

However, for non-food products, the pattern is somewhat different. None of the MM positions performed better than the status quo position, and three of them did significantly poorer – P4, P7 and P8. All of these three are back positions, and for non-food products the back positions were all the worst performing. This suggests that people *may* use the MM differently in making assessments of food and non-food products.

For non-food products, there also appears to be a negative correlation between the number of changes made to the display of the MM (between one and three changes), and the proportion of correct responses given; such that making three changes to the MM (location, orientation, size) received the lowest level of correct responses (18% lower than benchmark); while making one change achieved between 1% and 10% lower than the benchmark.

**Figure 5: Correct and Incorrect product selection – non-food products**

Benchmark

**QD1.** Of the two products shown below, which one would you buy?

**Note:** Statistically significant differences between the positions of the MM (where a significant difference p<0.05 exists) is indicated using an arrow and P1-P8. E.g. Position 5, correct = 59% is significantly higher than P7 and P8

**Base:** All respondents saw two positions; sample n for each position ranged from 393-419

**Figure 6: Variations from paired test benchmark – non-food products**

There were no consistent significant differences or trends of note by demographics. However, people who were more frequent users of information on labels and who gave higher levels of attention to this information were significantly more likely to choose the correct food product for a few positions.

All significant differences can be seen at Appendix C: Test 2 Design and Details.

## Test 3: Acceptability of Flexibility in the MM Display

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| Test 3 was designed to investigate conscious ratings of acceptance in relation to the different MM displays.  Of the eight variations to the MM location and format, for each of the food and non-food products, participants were exposed to a random selection of four mocked-up images per product type, and rated each in terms of their acceptance of the format. Respondents were deliberately given a range of options across which they could rate the various placements, with one of these being to say that it fell below their threshold for acceptability and explicitly needed Government regulations to avoid.  Again, the status quo was used as the benchmark, and variations from benchmark were observed for each product category and MM position. |

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| **Acceptance of flexibility in the MM display**  None of the eight variations in MM position was felt to be “unacceptable and in need of government regulation to avoid” by more than 25% of respondents. This is consistent with the qualitative interview results, where participants indicated that rather than being unacceptable, a product that made it hard to find the MM simply put itself at a competitive disadvantage.  Absolute acceptance of variations to the MM ranged from 74-92% acceptance across food products and 64-90% for non-food products; with the status quo position achieving the highest proportions of acceptance.  When looking at acceptability relative to the benchmark (status quo), there was an obvious decline in ratings of acceptability for MM displays as the number of dimensions changed from the status quo position increased, across both food and non-food products.  Younger and middle-aged people were more likely to be accepting of flexibility to the MM display, as were those who do not often look for information on product labels, and pay lower amounts of attention to product labelling. Older people indicated a greater desire for regulation, despite having rated the usefulness of the MM as amongst the lowest in Test 1. |

**Food products**

There appeared to be high levels of acceptance of flexibility in the MM for food products (74-92% of respondents considered all MM positions to be acceptable). For all positions a relatively small proportion of respondents rated the MM as being ‘*unacceptable and in need of Government regulation to prevent this*’ – ranging from 1% for the status quo (the benchmark) up to 15%-19% for smaller, back of pack positions.

It is notable that while back of pack positions actually performed best for food products in the option choices in Test 2, these positions were most likely to be considered unacceptable when prompted here – and the front / back position seems to have been the biggest trigger for conscious acceptability.

**Figure 7: Acceptability of differential MM location – food products**

**QE1.** Consider the product shown below. Do you think the orientation and position of the measurement marking on a real product would be…

**Note:** Statistically significant differences between the positions of the MM (where a significant difference p<0.05 exists) is indicated using an arrow and P1-P8. E.g. Position 1, good = 58% is significantly higher than all other positions

**Base:** All respondents saw four positions; sample n for each position ranged from 795-798

**Figure 8: Variation from benchmark of acceptability – food products**

**Non Food products**

There were similar levels of acceptability of placements of the MM for non-food products (64-90% acceptability). For non-food products it was noticeable that the positions with the highest level of “unacceptable” ratings were those with the greatest number of changes from the status quo position, peaking at 21%-25% for the smaller vertical positions (P6 and P8). Font size seemed to be a major issue for the non-food products.

**Figure 9: Acceptability of differential MM location – non-food products**

**QE1.** Consider the product shown below. Do you think the orientation and position of the measurement marking on a real product would be…

**Note:** Statistically significant differences between the positions of the MM (where a significant difference p<0.05 exists) is indicated using an arrow and P1-P8. E.g. Position 1, good = 48% is significantly higher than all other positions

**Base:** All respondents saw four positions; sample n for each position ranged from 795-799

**Figure 10: Variation from benchmark of acceptability – non-food products**

Overall, using the status quo as the benchmark, there was an obvious decline in ratings of acceptability for MM displays as the number of dimensions changed in the MM increases – especially for non-food products. For example, the acceptability of one change to the MM display across food products ranged from 2-10% lower than benchmark acceptability, two changes ranged from 9-15% lower than benchmark, and three changes achieved 18% lower than benchmark. A similar pattern was observed for different MM displays on non-food products: the acceptability of one change ranged from 4-10% lower than benchmark; two changes ranged from 11-22% lower than benchmark; and acceptability of three changes was 26% lower than benchmark.

In general, younger and middle-aged people (18-34 and 35-49 years) were significantly more likely to feel that variations to the MM were acceptable (or did not care), compared to their older counterparts (who were more likely to find them unacceptable). This is somewhat inconsistent with what the older respondents said in Test 1 though – where their pattern of responses indicated that they were one of the least likely groups to find the MM the most useful information for front of pack placement.

Families with children were significantly more likely to feel that variations to the MM on food products were acceptable (or did not care), compared to people with no children living at home. However, this is likely to be driven by the aforementioned age-related finding.

Those who looked for information on labels rarely, never or only the first purchase, and those who paid a low amount of attention to information on products were significantly more likely to be accepting of changes to the MM position and format.

Significant differences between subgroups can be seen in tables at Appendix D: Test 3 Design and Details.

It was interesting to note that 8%-9% of respondents felt that the status quo position of the MM (position 1) was either *unacceptable* or would be *difficult to use*. This demonstrates the linear nature of opinions. The current regulations around the MM just delineate one particular point on a curve, and there are some people for whom even the status quo is considered less than ideal.

|  |
| --- |
| **Qualitative Interview Results**  The relatively low proportion of respondents saying that any of the MM positions were outright unacceptable and in need of regulation is consistent with what was observed in the qualitative research.  In the in-situ interviews, respondents tended to feel that products which made it difficult for them to find the MM when they wanted it were not “unacceptable” per se, but rather just putting themselves at a competitive disadvantage. If they couldn’t easily assess a product, then they would just buy something else. |

## Net Benefit to the Consumer

|  |
| --- |
| A net benefitmeasure for food products and non-food productswas calculated by subtracting overall confusion (Test 2 score) from overall acceptance of the MM (Test 3 score) at each of the eight position variations. As some of the confusion measures were negative (ie: performance on Test 2 was above the benchmark score), the proportions in some circumstances exceed 100%. They have been converted into an index score to simplify interpretation.  The net benefit measure therefore represents the proportion of people who are accepting and not confused by the MM location and format, for each of the positions tested (1 representing the status quo, and 7 alternative positions under the principles-based approach).  This means that larger numbers represent higher net benefit (larger numbers of people accepting and not confused by the MM location). The absolute value of the net benefit score has little objective meaning, and it is more the relative score compared to the status quo and to other trial positions that is of interest.  Note that these net benefit scores evaluate the relative positions of the MM compared to the status quo position, but do not factor in the potential benefit to consumers of other types of information that might replace the MM on the front of pack if it was moved to another location. |

|  |
| --- |
| **Net consumer benefit associated with different MM displays**  “Net benefit” based purely on the variations in confusion (Test 2) and acceptability (Test 3) associated with each position showed that overall, the status quo position scores higher than any of the variations tested.  For food products, due to their better performance on Test 2, the back of pack variants had the highest net benefit scores other than the status quo. For non-food products there was no one factor that seemed most related to net benefit.  Overall, none of the three dimensions by which the MM position varied emerged as consistently more critical. Rather, there is a general negative correlation between the number of dimensions changed and the net benefit to the consumer – that is, as the number of dimensions changed increases, the net benefit decreases. |

The figure below shows that the net benefit score for all food products and all non-food products overall is higher for the status quo compared to the principles-based approach. The net benefit is lowest for the principles-based approach on non-food products.

**Figure 11: Net benefit overall for status quo vs principles-based regulation**

**Note:** Net benefit=Total acceptance – Total confusion

**Base:** All respondents (n=1,593) were included in net benefit calculations for the status quo vs principles-based approach

When looking at net benefit for each of the positions tested, this differed for food versus non-food products. Due to their better performance on Test 2, the highest net benefit measurements on food products were for back of pack MM locations, especially when combined with larger font size.

For non-food products, patterns of display factors was less clear in their influence of net benefit. To a degree, retaining the MM’s front of pack location and larger font size was important.

**Figure 12: Net benefit associated with each position tested – food products**

**Note:** Net benefit=Total acceptance – Total confusion

**Base:** All respondents (n=1,593) were included in net benefit calculations for the status quo vs principles-based approach

**Figure 13: Net benefit associated with each position tested – non-food products**

**Note:** Net benefit=Total acceptance – Total confusion

**Base:** All respondents (n=1,593) were included in net benefit calculations for the status quo vs principles-based approach

To further unpick the underlying drivers of consumer net benefit, averages were examined across combined alternatives for location, orientation and size.

Again due to the different patterns in Test 2, for non-food products, on average the front of pack location achieved higher net benefit compared to the back of pack location, but the opposite was true for food products. Horizontal orientation on average achieved higher net benefit across both product categories compared to vertical orientation, and larger MM font size far outweighed smaller font size.

**Figure 14: Net benefit associated with different location and size options on average**

**Note:** Net benefit=Total acceptance – Total confusion

**Base:** All respondents (n=1,593) were included in net benefit calculations for the status quo vs principles-based approach

While the breakdown of the three dimensions being altered did not show a clearly critical dimension, further looking at patterns within the net benefit scores does show an important result.

Looking at the findings by the number of dimensions changed from the status quo reveals that as the number of changes made to the status quo MM display increases, the net benefit to the consumer decreases. This pattern is especially evident in the non-food category, but is still visible in the food category as well.

**Figure 15: Net benefit associated with varying magnitudes of changes made to the status quo**

**Note:** Net benefit=Total acceptance – Total confusion

**Base:** All respondents (n=1,593) were included in net benefit calculations for the status quo vs principles-based approach

## MM Perceptions

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| The questionnaire concluded by asking a series of more traditional overt survey questions. By the time respondents saw these questions it was apparent to them what the topic of the survey was, and so their responses to these questions are much more primed and considered than were their responses to the previous tests.  As a result, the answers to these questions should be interpreted as considered responses rather than spontaneous responses. These would be analogous to data from any other surveys where respondents were aware of the topic or survey focus at the time of answering.  This effect can be seen in the comparison of question QF3 and Test 1. QF3 was a question at the end of the survey about what pieces of information are looked for in product labelling, and the results can be seen in Appendix H. The range of types of information included a number of the types used in Test 1 (relative usefulness), including the MM. In QF3 the relative importance of these other pieces of information followed a similar rank order to Test 1. However, the Measurement Marking was the one exception, jumping sharply from being one of the less useful types of information in Test 1 to having almost the highest level of use in QF3.  While it is possible that this result shows that the MM is heavily used even though it is not the most useful type of information that could be on the front of a pack, it is likely that it also at least partly reflects the impact of priming respondents to the main topic of the survey.  *Additional results from these final questions can be seen in Appendix G, H and I. These include frequency of purchasing the types of products used in the survey and general usage of packaging information and shelf labelling.* |

|  |
| --- |
| **Conscious opinions about the MM**  When directly asked, the MM is considered *at least moderately useful* as a way of determining value for money when choosing between product options by 78% of respondents, about the same as unit pricing (81%). However, 53% thought that unit pricing was *very* *useful* compared to 40% for the MM.  68% of respondents felt that government regulation is needed for the orientation and position of the MM. These results are quite dissimilar to Test 3, where a quarter of respondents or less felt that any specific example of alternative formatting of the MM required regulation to avoid. This reinforces that people do feel the MM is not something that can be totally unregulated – but suggests that the variations tested do not cross a threshold at which most people feel it has been compromised to the point where it is no longer usable.  A majority of respondents thought it was *at least moderately important* that the MM remain on the front of packs (67%), at least 2mm high (67%) and horizontal (58%). Of the three, remaining horizontal was slightly less important. |

### Usefulness of MM (and Unit Pricing) in Determining Value For Money

When prompted, the majority of respondents (78%) consider the MM to be either very useful or moderately useful in determining value for money. However, a significantly stronger proportion of respondents consider the unit price to ‘very useful’ compared to the measurement mark.

**Figure 16: Usefulness of the MM and unit pricing in determining value for money**

**QF4&5:** How useful do you generally find unit pricing/measurement marking is to determine value for money when choosing between product options?

**Note:** Statistically significant differences between usefulness of unit pricing and the MM (where a significant difference p<0.05 exists) is indicated using an arrow E.g. Very useful = 53% is significantly higher than Very useful = 40%

**Base:** n=1,188 unit pricing; n=1,107 MM

When looking at subgroup breakdowns, there were no differences for gender or household income in terms of perceived usefulness of unit pricing *or* the measurement mark.

Middle aged (35-49 years) and older (50 years and over) people were significantly more likely to find the MM useful (moderately + very) compared to their younger counterparts. The same pattern was observed for the perceived usefulness of the unit pricing. People without children living at home were significantly more likely to find the MM very or moderately important, compared to those with children – again probably reflecting the underlying age differences.

Not surprisingly, those who frequently look for information on labels or shelves and who pay higher attention to this information were significantly more likely to perceive both unit pricing and the MM as very or moderately useful.

These subgroup analyses can be seen in tables at Appendix F: Further Subgroup Analyses.

### Agreement that Government Regulation of the MM is Needed

When explicitly asked, the majority of respondents agree that government regulation of the orientation and position of the MM is needed (68% total agreement).

**Figure 17: Agreement that the orientation and location of the MM requires Government regulation**

**QF6:** Do you agree or disagree that Government regulation is needed for the orientation and position of the measurement mark?

**Base:** All respondentsn=1,593

These results are quite dissimilar to those from Test 3, where less than a quarter of respondents felt that any specific example of alternative formatting of the MM required regulation to avoid. This reinforces the general finding from the survey that people feel the MM is not something that can be totally unregulated – but suggests that the variations tested do not cross a threshold beyond which they feel it has been compromised to the point where it is no longer usable.

Older people were significantly more likely to (strongly) agree that Government regulation is needed for the orientation and position of the measurement mark. This is consistent with their pattern of responses for Test 3 (acceptability), but inconsistent with their responses for Test 1 (usefulness).

People who frequently look for information on product labels and shelves, and who pay more attention to product and shelf labelling were significantly more likely to (strongly) agree that Government regulation is needed in relation to the orientation and position of the measurement mark.

These subgroup analyses can be seen in tables at Appendix F: Further Subgroup Analyses.

### Importance that the MM Remains the Same

When prompted, a majority of about two thirds of the sample felt it was *at least moderately important* that the MM location remains on the front of pack and that the size remains at least 2mm high (67% total important for both measures). A slight majority also felt it was important than the direction remain horizontal (58% total important).

**Figure 18: Importance that the location and orientation of the MM remains the same**

**QF7:** How important is it to you that…

**Base:** All respondentsn=1,593

Older people (aged 50 years and older) and label readers were significantly more likely to feel that it is (very) important that the location, font size, and direction of the MM remain the same, compared to their counterparts.

Specific significant differences can be seen at Appendix F: Further Subgroup Analyses.

## Concerns

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| --- |
| At the very end of the survey respondents were asked “*If the measurement marking was not on the front of the pack, what, if any, concerns would you have*”. 47% of respondents indicated that they had no concerns by ticking that box, while 53% made some form of comment. These comments have been coded thematically and are shown below. A number of the comments made reflected ‘no concerns’, even though they did not select that tick box response. |

|  |
| --- |
| **Concerns about the MM moving from the front of packs**  Many respondents to the survey indicated no concerns if the MM moved from the front of packs. 47% directly selected the *no concerns* response option, and another 13% made a comment which indicated minimal concern so long as they were still able to find the information.  Older people were less likely to select the *no concerns* option, but the nature of their concerns did not dramatically differ from other age groups, with a slight emphasis on *having to pick up or turn over packs* if that was the case. |

A little over half the respondents indicated that they had no real concerns if the MM was not to be on the front of packs. 47% selected the *no concerns* response option, and another 13% made a comment which indicated minimal concern so long as they were still able to find the information.

**QF8. If the measurement marking was not on the front of the pack, what, if any, concerns would you have?**

|  |  |
| --- | --- |
| **Concern** | **%** |
| **None [Check box]** | **47%^** |
| Having to pick up or turn pack over if not on front / having to handle product to find it | 12%\* |
| If can’t easily find the information / not as visible / unclear / not seen quickly or at a glance | 11%\*\* |
| Takes / wastes additional time / effort if always have to look for it | 11% |
| Trying to hide it / have something to hide / suspicious / transparency | 7% |
| Not as confident to buy products / would not buy or look at products / purchase an alternative product with measurement | 7% |
| Not able to work out value for money / concerned about value / not easy to compare value / paying too much | 6% |
| Would not be able to make an informed purchase/ would not know if the correct weight has been given | 6% |
| **None / I would find it / would pick it up / so long as it is there on the back or marked somewhere** | **6%** |
| Having to look for it / inconvenient [general] | 5% |
| Try to hide reduction in pack weight / reduce pack size without customers noticing | 5% |
| Companies would take advantage of it / rip off customers / deceive customers | 5% |
| Front is better / preferred [general] | 5% |
| **None / nothing / not many concerns [NFI]** | **4%** |
| Shoppers would not bother to look or forget to look for the measurement mark / would not look at the back particularly if in a hurry | 3% |
| Overlooked / missed | 2% |
| Hard to read if with lots of other information on back panel | 2% |
| Hard to read if too small | 2% |
| Concern about quality / contents of product | 2% |
| Packaging can mislead / might not be able to tell how much is in a pack | 2% |
| **None/ If it is easy to find / clear / in large font** | **2%** |
| General expression of concern | 2% |
| Would make it harder to compare [NFI] | 2% |
| Annoying / frustrating / irritating / confusing / inconvenient/ dislike the idea [general] | 2% |
| Something else | 1% |
| Would not trust product | 1% |
| Not able to work out if there is the right amount that I need / consuming | 1% |
| Better if always in same place / know where to look / confusing | 1% |
| **None / I don’t use it anyway / wouldn’t make any difference / I can estimate the size** | **1%** |
| Shelf information label would need to display the measurement mark | 1% |
| May not be able to read [general] | 0.5% |
| Hard to read if not horizontal | 0.1% |
| Measurement mark cannot be compared against the shelf information | 0.1% |

There were relatively minor differences only seen across the major demographic groups in the sample:

^ Older respondents were less likely to select the *no concerns* check box and provide a written response (58% of those aged 18-29 checked this box, decreasing to 35% of those aged 60+).

\* People aged 45+ were more likely to identify having to pick up or turn over a product as a concern (14% of those 45+ compared to 8% of those under 45). Women were also more likely to identify this as a concern (14% vs 7% of males).

\*\* 18% of those aged 18-29 indicated a concern around *if they can’t easily find the information*, compared to 9%-11% for the older age groups. While this age pattern was reversed compared to the previous point, the gender difference was in the same direction, with this mentioned by 15% of women and 8% of men.

# Appendix : Technical Appendix

### Detailed Methodology

#### Qualitative In-store Intercept Interviews

Overview and purpose

The initial research stage involved 25 x 15 minute in-store interviews with consumers in the midst of a purchase decision. The purpose of this qualitative research stage was to inform the subsequent quantitative research stage by providing realistic in-situ information regarding the most important factors to consumers when making product selections and purchase decisions. It was important to understand if consumers use the measurement marking when selecting products, and if so, under what circumstances they do this. It also provided an initial indication of consumers’ considered reactions to any proposed changes to measurement markings.

Detail

As the Department was interested in the measurement marking on packaged FMCG products, the following four retail environments were nominated as locations that would sell such products: Supermarkets, Pharmacy, Hardware and Liquor Stores.

The number of interviews was weighted more towards the supermarket setting, due to the larger number and breadth of product categories displaying the measurement mark, and the need to understand differences between the various product categories.

The interview stratification acknowledged the need to explore any socio-economic differences in purchase behaviours and use of labelling and packaging information. Interviews were initially stratified by state/territory (Adelaide and Canberra), retail environment (supermarket, pharmacy, hardware store and liquor store), then split to comprise half relatively lower and half relatively higher socio-economic locations. This was revised during the fieldwork to a 75:25 (lower:higher) split, as it became apparent that the measurement marking’s role in the purchase decision was primarily related to value for money calculations, and thus generally had higher importance for those in the lower socio-economic locations. Across the various locations, consumers interviewed were from a range of age groups, life-stages, and were shopping in different groups, to ensure a broad spread of opinions were ascertained. Interviews were conducted on various week days and weekend days at different times, to ensure diverse coverage.

In addition, and of particular importance in the supermarket setting, interviewers asked consumers about their purchase decisions regarding a range of different product types, in order to understand the differences relating to measurement marking use. The interview structure is demonstrated in Table 1, overleaf.

**Table 1: Qualitative Interview Structure**

|  |  |  |  |
| --- | --- | --- | --- |
| **Adelaide Interview Structure** | | | |
|  | High-socio economic location | Low-socio economic location | **TOTAL** |
| Supermarket | 2 | 6 | 8 |
| Pharmacy | 1 | 4 | 5 |
| Hardware | 1 | 2 | 3 |
| Liquor Store | 1 | 3 | 4 |
| **Canberra Interview Structure** | | | |
| Supermarket | - | 2 | 2 |
| Pharmacy | - | - |  |
| Hardware | - | 2 | 2 |
| Liquor Store | 1 | - | 1 |
| **TOTAL** | **6** | **19** | **25** |

All participants were given $10 in the form of a cash incentive or an in-store voucher for their time and participation.

Outcomes

This in-situ research in real time, at the point of purchase decision, provided realistic findings that informed the design of the quantitative phase. Interviews explored the relative importance of the measurement marking compared to the use and importance of other types of on pack information, as well as ascertaining whether there was any difficulty in locating the measurement marking on a range of products. Interviews also explored consumers’ initial reactions to potential changes in the size, location and position of the measurement marking on packaged products, should a principles-based system be adopted. The qualitative findings informed which products should be tested in the quantitative survey – i.e. on which packaged food, beverage, alcoholic beverage, cosmetic and aerosol products the measurement markings were used the most and/or were perceived as the most important to consumers.

The in-store research instrument can be seen at Appendix J: Qualitative Intercept Interview Guide.

#### Quantitative online survey

Overview and purpose

Following the qualitative research phase outlined above, a national 15 minute online quantitative survey was conducted with n=1,593 respondents.[[2]](#footnote-2)

The survey was based around six products (three food products, and three other non-food products). Respondents provided evaluations for one product from each of the two groups.

The core of the quantitative survey comprised three tests to determine:

1. the relative importance of the measurement marking on the front of packaged products, compared to alternative front of pack information;
2. the level of confusion and poor purchase decisions that could result from differential measurement marking location as per the proposed principles-based approach; and
3. levels of acceptability associated with differential measurement marking location, as per the proposed principles-based approach.

The rationale for the approach taken in each of these tests, as well as details about the specific test design are detailed in the appendices below.

Selection of product types

The quantitative survey was designed from the findings from the qualitative stage, including the types of products where the measurement marking tends to be more important to consumers. These findings defined the specific product types for testing in the survey.

Due to the wider variety of food products available in supermarkets compared to products in other retail environments, and the ubiquity of supermarket shopping, food products were given disproportionate representation in the survey. A total of three packaged food products were selected: a bottle of tomato sauce, a block of packaged cheese and a packet of potato chips.

Within the nominated alternative retail environments, (hardware stores, pharmacies and liquor shops), the following products were selected: insect aerosol spray, sunscreen, and distilled spirits.

These six packaged products were selected for the following reasons:

* products that would be accessible and purchased by most/all segments of the general population;
* products which would generally not comprise frequent or familiar purchases, i.e. are not “staple” products;
* products which are sufficiently generic and can act as exemplars (representative of other categories);
* products which are not known for a high degree of brand loyalty;
* products which do not have a standard shape or size of package;
* products with no individual ‘servings’ or ‘portions’;
* food products which represent a range of different categories (e.g. dairy, condiment, snack food).

Selecting products on this basis ensured that purchase decisions would not be automatic or subconscious, and would involve a degree of conscious consideration, and it would be conceivable that the measurement marking would be used.

Product images

In the quantitative survey, images of the products were required as the tests were designed to replicate real shopping choices. The images used were modified products for sale internationally (and not in Australia), or existing mock-up images. This approach was designed to ensure that brand associations (either positive or negative) did not influence test outcomes, and a clean measurement of the variables of interest was achieved.

Images comprised the front and the back of packs, and included relevant variables required for testing. All images contained information that would be expected on packaging. Large images, and / or a zoom function ensured respondents could easily see all the on-pack information if and when desired.

Tests undertaken in survey

Respondents were first screened to ensure they are consumers and purchasers of at least one of the three products across the food and the non-food groups. Those who reported never purchasing any of the three across either group were terminated. Respondents completed three tests for one of the packaged food products, and one of the non-food products. The tests are described in brief above, and detail is provided in the results section.

# Appendix : Test 1 (MaxDiff) Design and Details

### Rationale For Test

Test 1 was designed to address research objective 1 and 2:

1. to understand the relative **usage** and **importance** of all labelling components (including the measurement marking) when making a purchase decision in situ (e.g. supermarkets, bottle shops, pharmacies, and hardware stores) across a series of FMCG products (pre-packaged foods and beverages, alcoholic beverages, cosmetics and aerosols);
2. to understand relative to other labelling elements, the importance of the location, size and orientation of the measurement marking (currently on the primary display panel (front) on these products).

The qualitative research showed that overall, other pieces of information on product labels and packs, and on shelves, are looked for and read more frequently, relative to the measurement marking. While consumers’ calculations of value for money at times used the measurement marking, it is not the only, or the dominant means of calculating value for money. Retailer information on shelves (e.g. price, promotions) are often used to calculate value for money (in preference to the measurement marking across many product types), especially in lower SES locations. Other strategies include using statements about servings or portions per pack (e.g. stir-fry sauce packets, muesli bars), visual cues to compare products (e.g. size of bottles, packages; visual estimations of how large a serving size would be required), touch (to ascertain quantity, e.g. number of biscuits per packet).

Accordingly, the qualitative findings suggested that the measurement marking is generally of lower importance in purchase decisions, relative to other information on packs (and on shelves).

Test 1 was designed to test this hypothesis in a statistically robust way, by minimising bias and deriving the importance associated with the presence of the measurement marking on the front of the pack (as per the current regulation standard). Importance will be measured relative to other pieces of alternative information that manufacturers could conceivably display in the current position the measurement marking occupies, if a principles-based standard was adopted.

### Test Design

The test employed the use of a maximum difference (MaxDiff) scaling analysis in order to derive importance of the measurement marking compared to possible other front of pack information. This technique was used as it enabled respondents to make comparisons between large numbers of variants (eight similar but different product variants in this instance), by presenting the eight product variants in small sets or “scenarios” and asking respondents to select the ‘most useful’ and the ‘least useful’ for a purchase decision in each scenario. The combination of the options presented in each scenario, and the number of scenarios evaluated was programmed according to a rigorous experimental design.

Analysis of the ratings within each set were used to reveal the relative usefulness of labelling elements and provides a measure of derived usefulness. Deriving usefulness (and thusly importance) removes the bias that a direct stated method (asking respondents to rank the eight options from most to least important) would achieve. MaxDiff analysis is able to analyse in detail the interplay between all eight product variants.

The Test 1 product variants included the following differences across the six product types:

1. Measurement Mark

2. Best before / Expiry date

3. Country of Origin

4. Allergen Information

5. Nutrition content claim / alcohol content claim / safety claim

6. Ingredient claim

7. Servings per pack

8. Pack claim

The specific details for each product is shown in Table 2 below.

**Table 2: Test 1 product variant details for six test products**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | Tomato Sauce | Potato Chips | Cheese | Sunscreen | Spirits  (Gin) | Aerosol  (Insect spray) |
| 1. Measurement mark | 500ml | 170g | 500g | 150ml | 700ml | 150g |
| 2. Best before/ Expiry date | Best before 01/08/16 | Best Before 20/12/15 | Best before 15/11/15 | EXP 07/2016 | Bottled 02/2015 | EXP 07/2016 |
| 3. Country of origin | 100% Made in Australia | 100% Made in Australia | 100% Made in Australia | 100% Made in Australia | Product of France | 100% Made in Australia |
| 4. Allergen Information | May contain traces of milk products | Contains Gluten, Soybean and Soybean products | Made from cow’s milk | For Sensitive Skin | Alcohol warning label | Safe for sensitive skin |
| 5. Nutrition content claim / alcohol content / safety claim | Reduced sugar | Reduced fat | Reduced fat | With Panthenol for greater protection | 42.4% Alc/Vol | Safe for use around pets |
| 6. Ingredient claim | No Preservatives | No artificial colours | No artificial flavours | Oil free | Preservative free | Uses natural repellents |
| 7. Servings per pack | 33 serves per pack | 6 serves per pack | 24 serves per pack | 30 applications | Approx 23 standard drinks | Over 200 sprays per can |
| 8. Pack claim | New nozzle for less waste! | New Packet for fresher flavour! | Improved fresh seal pack! | New improved non-drip nozzle! | New smooth-pour bottle design | New nozzle for more accurate spraying |

As can be seen in the table above, in some instances the categories were modified slightly to better the suit the product being tested. For example, rather than display allergen information, the spirits bottle displayed an alcohol warning message.

### Test Procedure

Respondents completed Test 1 for one supermarket product and one of the other three product types (either Sunscreen, Inset spray or Spirits). The order that products were presented in was randomised for each respondent.

During the survey (for each product type) respondents were presented with five scenarios, one at a time. The order the scenarios were presented in was according to a balanced experimental design. Each of these five scenario contained images of four of the eight possible front of pack label options. Which four options were contained within each scenario was also based on the balanced experimental design.

For each of the five scenarios respondents were asked “Of the FOUR product packs shown below, which do you think is MOST useful, and which is LEAST useful in deciding what to buy?”

An example of one scenario is shown below:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |
| MOST USEFUL |  |  |  |  |
| LEAST USEFUL |  |  |  |  |

### Additional Subgroup Analyses

**Table 3: Usefulness of packaging elements by product type**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | Tomato Sauce  A | Potato Chips  B | Cheese  C | Sunscreen  D | Spirits  (Gin)  E | Aerosol  (Insect spray)  F |
| Base: n= | 533 | 532 | 528 | 528 | 534 | 531 |
| A nutritional / health claim | 15% | 13% | 14% | 12% | 28%A,B,C,D | 20% A,B,C,D |
| Country of Origin | 20%E,F | 20%E,F | 19%E,F | 16% | 9% | 14% |
| An ingredient claim | 19%D,E | 14% | 14% | 11% | 10% | 15%D,E |
| Allergen info | 8% | 14%A,C,E | 7% | 24%A,C,E | 10% | 15%A,C,E |
| Date | 16%D,E,F | 14%E,F | 19%D,E,F | 11% | 8% | 7% |
| Servings per pack | 6% | 8% | 10% | 9% | 17%A,B,D | 11%A,B |
| Measurement Mark | 11%D,F | 10% | 10% | 8% | 13%D,F | 6% |
| Generic product/pack claim | 7% | 7% | 8% | 9% | 6% | 11%A,B,E |

**Note** Statistically significant differences between the positions of the MM (where a significant difference p<0.05 exists) is indicated using column reference letters A-F

**Food products**

**Table 4: Profile of those who considered the measurement marking to be ‘most useful’ on food products, by gender**

|  |  |  |
| --- | --- | --- |
|  | **Male**  **A** | **Female**  **B** |
| Respondents who selected the MM as most useful | 40%B | 30% |

**Note**: Only questions where significant differences are observed have been reported

**Note:** Statistically significant differences between those who selected the MM as most important and those who did not (where a significant difference p<0.05 exists) are indicated by column reference letters A and B

**Base:** All respondentsn=1,593

**Table 5: Profile of those who considered the measurement marking to be ‘most useful’ on food products, by age group**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **18 – 29 years**  **A** | **30 – 39**  **B** | **40 – 49**  **C** | **50 – 59**  **D** | **60 +**  **E** |
| Respondents who selected the MM as most useful | 49%B,C,D,E | 39%D,E | 34%E | 28% | 25% |

**Note**: Only questions where significant differences are observed have been reported

**Note:** Statistically significant differences between those who selected the MM as most important and those who did not (where a significant difference p<0.05 exists) are indicated by column reference letters A-E

**Base:** All respondentsn=1,593

**Table 6: Profile of those who considered the measurement marking to be ‘most useful’ on food products, by label information use**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Net: For every product + For most products**  **A** | **For some products**  **B** | **Rarely**  **C** | **Only the first time I buy something**  **D** | **Never**  **E** |
| Respondents who selected the MM as most useful | 32% | 35% | 39% | 40% | 40% |

**Note**: Only questions where significant differences are observed have been reported

**Note:** Statistically significant differences between those who selected the MM as most important and those who did not (where a significant difference p<0.05 exists) are indicated by column reference letters A and B

**Base:** All respondentsn=1,593

**Non-food products**

**Table 7: Profile of those who considered the measurement marking to be ‘most useful’ on non-food products, by gender**

|  |  |  |
| --- | --- | --- |
|  | **Male**  **A** | **Female**  **B** |
| Respondents who selected the MM as most useful | 35%B | 26% |

**Note**: Only questions where significant differences are observed have been reported

**Note:** Statistically significant differences between those who selected the MM as most important and those who did not (where a significant difference p<0.05 exists) are indicated by column reference letters A and B

**Base:** All respondentsn=1,593

**Table 8: Profile of those who considered the measurement marking to be ‘most useful’ on non-food products, by age group**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **18 – 29 years**  **A** | **30 – 39**  **B** | **40 – 49**  **C** | **50 – 59**  **D** | **60 +**  **E** |
| Respondents who selected the MM as most useful | 43%B,C,D,E | 36%C,D,E | 26% | 22% | 24% |

**Note**: Only questions where significant differences are observed have been reported

**Note:** Statistically significant differences between those who selected the MM as most important and those who did not (where a significant difference p<0.05 exists) are indicated by column reference letters A and B

**Base:** All respondentsn=1,593

**Table 9: Profile of those who considered the measurement marking to be ‘most useful’ on non-food products, by label information use**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Net: For every product + For most products**  **A** | **For some products**  **B** | **Rarely**  **C** | **Only the first time I buy something**  **D** | **Never**  **E** |
| Respondents who selected the MM as most useful | 32% | 27% | 31% | 29% | 47% |

**Note**: Only questions where significant differences are observed have been reported

**Note:** Statistically significant differences between those who selected the MM as most important and those who did not (where a significant difference p<0.05 exists) are indicated by column reference letters A and B

**Base:** All respondentsn=1,593

# Appendix : Test 2 Design and Details

### Rationale For Test

Test 2 was designed to address research objective 3 and in part, research objective 1:

1. to determine the levels of consumer interest, concern and potential confusion that may be associated with a change in location, size and orientation of the measurement marking;
2. to understand the relative **usage** and **importance** of all labelling components (including the measurement marking) when making a purchase decision in situ (e.g. supermarkets, bottle shops, pharmacies, and hardware stores) across a series of FMCG products (pre-packaged foods and beverages, alcoholic beverages, cosmetics and aerosols).

As aforementioned, the qualitative findings suggested that the measurement marking can a play a role for some consumers in value for money calculations when comparing products. However, in many instances retailers’ shelf promotions and ticketing (e.g. ½ price, 30% off etc.) is used in preference to the measurement mark. Qualitative research found that consumers often noticed brightly coloured shelf information first, before ascertaining the best value option by looking in more detail at other information (such as unit pricing or overall price and pack size).

### Test Design

Based on the learnings from the qualitative phase, Test 2 was designed to replicate in-store product comparisons and determinations by presenting consumers with a series of paired products which to compare. Products were the same in terms of product type, brand and product information, with the exception of the size of pack, the measurement mark, the price, and an on-shelf promotion.

Pairs of similar products were presented to respondents – one with a “standard price”, and the other with a promotional price, and respondents were asked which they would buy. Across the various pairs of products, the size, location and orientation of the measurement marking was purposely varied on the product. In each pair, the product that was of a standard price represented better value for money (once price and pack size was considered), so logically should always have been the option selected to purchase by respondents; the “correct” option. Ultimately, Test 2 was designed to ascertain if differential measurement marking location (i.e. flexibility in measurement marking size, location and orientation) imposes difficulty or causes confusion on the part of respondents to correctly determine the best value for money for the same product of a different size in the face of promotions.

An example of a product pair is shown below:

|  |  |
| --- | --- |
|  |  |

In order to determine the threshold for confusion, eight different locations of the measurement marking were tested, the status quo and seven possible alternatives varying in terms of location on pack, size or orientation:

1. (Status Quo) Front, larger size, horizontal
2. Front, larger size, vertical
3. Back, larger size, horizontal
4. Back, larger size, vertical
5. Front, 50% smaller, horizontal
6. Front, 50% smaller, vertical
7. Back, 50% smaller, horizontal
8. Back, 50% smaller, vertical

The status quo measurement marking was included so could be used as a benchmark, in that the proportion of respondents who made the correct product selection for the status quo location could be compared to the proportion who made the correct product selection for the variations in location. In that way confusion can be easily measured.

The product details for each pair (i.e. the prices and pack sizes) were designed with consideration for not biasing the results in any way. As such the following criteria was taken into account:

1. In each pair, the pack sizes were slightly but not largely different, to ensure that respondents did not select product on the basis of pack size alone (e.g. by default some shoppers just prefer bulk or larger pack sizes, regardless of value for money).
2. The product with the larger pack size was also rotated across the pairs so that in half of the pairs the promoted product had the larger pack size and in the other half the product that was not promoted was larger.
3. A similar randomisation took place with the price of each product. In half of the pairs the promoted product had the higher overall price and in the other half the product that was not promoted had a higher overall price.
4. In each pair the price differential between the promoted product and other product was designed to be approximately 10% so that whilst the value for money comparison was not overtly obvious, it was also not too difficult to calculate and was, more importantly consistent across the test pairs in order to ensure changes in measurement marking location, not difficulty in calculating value for money was driving the variation in responses.

The specific details for each product pair can be found in the table below.

**Table 10: Test 2 design**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | | Pair one | | Pair two | |
| Tomato sauce | | Test Prod | Special prod | Test Prod | Special prod |
| Overall Price | | $ 3.20 | $ 3.00 | $ 3.98 | $ 5.49 |
| Pack size | | **350** | 300 | 500 | **600** |
| Price per 100g | | $ 0.91 | $ 1.00 | $ 0.80 | $ 0.92 |
| % saving of cheaper product | | 9% |  | 13% |  |
| Potato Chips | | Test Prod | Special prod | Test Prod | Special prod |
| Overall Price | | $ 3.20 | $ 3.80 | $ 1.99 | $ 1.80 |
| Pack size | | 170 | **180** | **90** | 75 |
| Price per 100g | | $ 1.88 | $ 2.11 | $ 2.21 | $ 2.40 |
| % difference | | 11% |  | 8% |  |
| Cheese | | Test Prod | Special prod | Test Prod | Special prod |
| Overall Price | | $ 4.50 | $ 3.99 | $ 5.30 | $ 6.20 |
| Pack size | | **250** | 200 | 380 | **400** |
| Price per 100g | | $ 1.80 | $ 2.00 | $ 1.39 | $ 1.55 |
| % difference | | 10% |  | 10% |  |
| Sunscreen | | Test Prod | Special prod | Test Prod | Special prod |
| Overall Price | | $ 6.95 | $ 11.95 | $ 19.98 | $ 17.50 |
| Pack size | | 200 | **300** | **500** | 400 |
| Price per 100g | | $ 3.48 | $ 3.98 | $ 4.00 | $ 4.38 |
| % difference | | 13% |  | 9% |  |
| Spirits | | Test Prod | Special prod | Test Prod | Special prod |
| Overall Price | | $ 48.00 | $ 47.00 | $ 40.00 | $ 46.50 |
| Pack size | | **750** | 700 | 700 | **750** |
| Price per 100g | | $ 6.40 | $ 6.71 | $ 5.71 | $ 6.20 |
| % difference | | 5% |  | 8% |  |
| Insect spray | | Test Prod | Special prod | Test Prod | Special prod |
| Overall Price | | $ 7.50 | $ 8.80 | $ 9.25 | $ 9.00 |
| Pack size | | 170 | **180** | **300** | 265 |
| Price per 100g | | $ 4.41 | $ 4.89 | $ 3.08 | $ 3.40 |
| % difference | | 10% |  | 9% |  |
| **Basket** | | **$ 73.35** | **$ 78.54** | **$ 80.50** | **$ 86.49** |
|  | | 9.4% |  | 9.4% |  |
| Higher cost |
| **Larger packet** |

### Test Procedure

Respondents completed Test 2 for the same food product and non-food product types as they were exposed to for Test 1.

During the survey (for each product type) respondents were presented with two (of a possible eight pairs) one at a time. The number of evaluations was limited to two per product (thus, four in total), to protect against familiarity and practice effects.

The order the pairs were presented in was randomised so that across the two pairs for each product:

1. One pair had a large pack for the promoted product and the other for the standard priced product;
2. One pair had a higher price for the promoted product and the other for the standard priced product;
3. One pair showed an option for the measurement marking on front of pack and the other for one of the back of pack location options.

### Additional Test 2 Subgroup Analyses

The tables below demonstrate where significant differences exist. Results have not been displayed where there are no significant differences.

**Food products**

**Table 11: Correct product selection – food products, by age group**

|  |  |  |  |
| --- | --- | --- | --- |
|  | 18-34 years  A | 35-49 years  B | 50 years +  C |
| Position 1 | 54% | 62% | 55% |
| Position 2 | 51% | 50% | 53% |
| Position 3 | 65% | 64% | 77%A,B |
| Position 4 | 73% | 65% | 64% |
| Position 5 | 52% | 45% | 57% |
| Position 6 | 36% | 40% | 43% |
| Position 7 | 62% | 61% | 70% |
| Position 8 | 56% | 61% | 66% |

**QD1.** Of the two products shown below, which one would you buy?

**Note:** Statistically significant differences between age groups (where a significant difference p<0.05 exists) are indicated by column reference letters A, B & C

**Base:** All respondents saw two positions; sample n for each position ranged from 375-421

**Table 12: Correct product selection – food products, by product label use in-store**

|  |  |  |
| --- | --- | --- |
|  | I look at information on product labels for every / most / some products  A | I look at information on product labels rarely / Only the first time I buy something / Never / Unsure  B |
| Position 1 | 59%B | 45% |
| Position 2 | 52% | 50% |
| Position 3 | 74%B | 57% |
| Position 4 | 66% | 69% |
| Position 5 | 54% | 46% |
| Position 6 | 39% | 44% |
| Position 7 | 70%B | 46% |
| Position 8 | 61% | 63% |

**QD1.** Of the two products shown below, which one would you buy?

**Note:** Statistically significant differences between those who use labels for every/most/some products and those look at labels rarely/first time they buy something/never/unsure (where a significant difference p<0.05 exists) are indicated by column reference letter A and B

**Base:** All respondents saw two positions; sample n for each position ranged from 375-421

**Table 13: Correct product selection – food products, by product label attention in-store**

|  |  |  |
| --- | --- | --- |
|  | Very high / High / Medium amount of attention paid to information on product labels  A | Very low / low amount of / no attention / Unsure  B |
| Position 1 | 58% | 51% |
| Position 2 | 51% | 51% |
| Position 3 | 73%B | 60% |
| Position 4 | 67% | 67% |
| Position 5 | 53% | 50% |
| Position 6 | 40% | 35% |
| Position 7 | 68%B | 54% |
| Position 8 | 60% | 67% |

**QD1.** Of the two products shown below, which one would you buy?

**Note:** Statistically significant differences between those who pay a very high/high/medium amount of attention and those who pay a very low/low/no/unsure amount of attention (where a significant difference p<0.05 exists) are indicated by column reference letters A and B

**Base:** All respondents saw two positions; sample n for each position ranged from 375-421

**Non-food products**

**Table 14: Correct product selection – non-food products, by age group**

|  |  |  |  |
| --- | --- | --- | --- |
|  | 18-34 years  A | 35-49 years  B | 50 years +  C |
| Position 1 | 60% | 54% | 66% |
| Position 2 | 59% | 55% | 61% |
| Position 3 | 43% | 40% | 62%A,B |
| Position 4 | 46% | 41% | 48% |
| Position 5 | 52% | 59% | 65% |
| Position 6 | 52% | 57% | 54% |
| Position 7 | 43% | 46% | 43% |
| Position 8 | 49% | 36% | 42% |

**QD1.** Of the two products shown below, which one would you buy?

**Note:** Statistically significant differences between age groups (where a significant difference p<0.05 exists) are indicated by column reference letters A, B & C

**Base:** All respondents saw two positions; sample n for each position ranged from 393-419

**Table 15: Correct product selection – non-food products, by household structure**

|  |  |  |  |
| --- | --- | --- | --- |
|  | Younger single / couple with no children  A | Mature couple or single, no children at home  B | Family with children at home  C |
| Position 1 | 63% | 67% | 54% |
| Position 2 | 63% | 59% | 56% |
| Position 3 | 40% | 61%A | 50% |
| Position 4 | 48% | 44% | 46% |
| Position 5 | 65% | 65% | 54% |
| Position 6 | 44% | 55% | 58% |
| Position 7 | 48% | 43% | 44% |
| Position 8 | 50% | 42% | 40% |

**QD1.** Of the two products shown below, which one would you buy?

**Note:** Statistically significant differences between household structures (where a significant difference p<0.05 exists) are indicated by column reference letters A, B & C

**Base:** All respondents saw two positions; sample n for each position ranged from 393-419

**Table 16: Correct product selection – non-food products, by shelf information use in-store**

|  |  |  |
| --- | --- | --- |
|  | I look at information on product shelves for every / most / some products  A | I look at information on product shelves rarely / Only the first time I buy something / Never / Unsure  B |
| Position 1 | 61% | 57% |
| Position 2 | 61%B | 47% |
| Position 3 | 52% | 43% |
| Position 4 | 45% | 45% |
| Position 5 | 61% | 54% |
| Position 6 | 56% | 45% |
| Position 7 | 45% | 41% |
| Position 8 | 42% | 46% |

**QD1.** Of the two products shown below, which one would you buy?

**Note:** Statistically significant differences between those who use shelf information for every/most/some products and those look at shelf information rarely/first time they buy something/never/unsure (where a significant difference p<0.05 exists) are indicated by column reference letter A and B

**Base:** All respondents saw two positions; sample n for each position ranged from 393-419

**Table 17: Correct product selection – food products, by product label attention in-store**

|  |  |  |
| --- | --- | --- |
|  | Very high / High / Medium amount of attention paid to information on product labels  A | Very low / low amount of / no attention / Unsure  B |
| Position 1 | 61% | 59% |
| Position 2 | 60% | 55% |
| Position 3 | 51% | 48% |
| Position 4 | 46% | 47% |
| Position 5 | 63%B | 48% |
| Position 6 | 54% | 51% |
| Position 7 | 46% | 40% |
| Position 8 | 44% | 36% |

**QD1.** Of the two products shown below, which one would you buy?

**Note:** Statistically significant differences between those who pay a very high/high/medium amount of attention and those who pay a very low/low/no/unsure amount of attention (where a significant difference p<0.05 exists) are indicated by column reference letters A and B

**Base:** All respondents saw two positions; sample n for each position ranged from 393-419

# Appendix : Test 3 Design and Details

### Rationale For Test

Test 3 was designed to understand consumers’ conscious (stated) responses of acceptability regarding changes to the size, location or orientation of the measurement mark. The test was designed to address research objective 4 and 5 (and used the same food and non-food products as the previous tests):

1. to explore any differences in consumers’ responses to measurement markings across different products / ranges / price points;
2. to investigate how aligned the minimum labelling requirements (size, position) are with consumer preferences, expectations, confidence and trust.

Qualitative findings suggest that there would be minimal resistance to changes in the measurement marking location, or orientation on pack. As long as the measurement marking remained present on product packs, a reduction in size of the measurement marking was the only concern for some consumers.

### Test Design

Whilst Test 1 and 2 were designed to replicate realistic decision making while minimising attention to variations in the measurement marking location, orientation and size, Test 3 was designed to draw attention to the measurement mark, and gain direct responses to variation in the location, size and orientation of the measurement marking across the various product types.

Eight locations of the measurement marking were tested, the status quo and seven possible alternatives varying in terms of location on pack, size or orientation:

1. (Status Quo) Front, larger size, horizontal
2. Front, larger size, vertical
3. Back, larger size, horizontal
4. Back, larger size, vertical
5. Front, 50% smaller, horizontal
6. Front, 50% smaller, vertical
7. Back, 50% smaller, horizontal
8. Back, 50% smaller, vertical

An example product bearing the measurement marking at Position 4 is shown below:



### Test Procedure

Respondents completed Test 3 for the same food product and one of non-food product types. During the survey (for each product type) respondents were presented with four of the eight location options one at a time. The number of evaluations was limited to four to ensure manage overall survey length and safeguard against respondent fatigue and data quality. The survey was programmed to ensure that each respondents evaluated four different location alternatives for their second product, ensuring they were exposed to all eight locations overall (i.e. across two product types).

For each product respondents were asked: “Consider the product shown below. Do you think the orientation and position of the measurement marking on a real product would be…”

1. Good

2. Ok

3. Acceptable, although it would be difficult to use

4. Unacceptable and in need of Government regulations to prevent this

5. I don’t care

### Additional Subgroup Analyses

The tables below demonstrate where significant differences exist. Results have not been displayed where there are no significant differences.

**Food products**

**Table 18: Acceptance of differential MM location – food products – by age group**

|  |  |  |  |
| --- | --- | --- | --- |
|  | 18-34 years  A | 35-49 years  B | 50 years +  C |
| Position 1 | 99% | 98% | 98% |
| Position 2 | 99%C | 97% | 94% |
| Position 3 | 92% | 91% | 88% |
| Position 4 | 91%C | 88% | 83% |
| Position 5 | 98% | 97% | 95% |
| Position 6 | 97%C | 95%C | 86% |
| Position 7 | 88% | 88% | 82% |
| Position 8 | 84%C | 88%C | 75% |

**QE1.** Consider the product shown below. Do you think the orientation and position of the measurement marking on a real product would be…

**Note:** Statistically significant differences between age groups (where a significant difference p<0.05 exists) are indicated by column reference letters A, B and C

**Base:** All respondents saw four positions; sample n for each position ranged from 795-798

**Table 19: Acceptance of differential MM location – food products – by gender**

|  |  |  |
| --- | --- | --- |
|  | Male  A | Female  B |
| Position 1 | 98% | 99% |
| Position 2 | 96% | 97% |
| Position 3 | 88% | 93%A |
| Position 4 | 87% | 87% |
| Position 5 | 95% | 97% |
| Position 6 | 90% | 93% |
| Position 7 | 84% | 87% |
| Position 8 | 79% | 84%A |

**QE1.** Consider the product shown below. Do you think the orientation and position of the measurement marking on a real product would be…

**Note:** Statistically significant differences between genders (where a significant difference p<0.05 exists) are indicated by column reference letters A and B

**Base:** All respondents saw four positions; sample n for each position ranged from 795-798

**Table 20: Acceptance of differential MM location – food products – by household income**

|  |  |  |
| --- | --- | --- |
|  | Household income of $100,000 or less per year  A | Household income of more than $100,000 per year  B |
| Position 1 | 99% | 98% |
| Position 2 | 96% | 98% |
| Position 3 | 89% | 92% |
| Position 4 | 85% | 87% |
| Position 5 | 96% | 98% |
| Position 6 | 91% | 96%A |
| Position 7 | 84% | 87% |
| Position 8 | 81% | 82% |

**QE1.** Consider the product shown below. Do you think the orientation and position of the measurement marking on a real product would be…

**Note:** Statistically significant differences household incomes (where a significant difference p<0.05 exists) are indicated by column reference letters A and B

**Base:** All respondents saw four positions; sample n for each position ranged from 795-798

**Table 21: Acceptance of differential MM location – food products – by household structure**

|  |  |  |  |
| --- | --- | --- | --- |
|  | Younger single / couple with no children  A | Mature couple or single, no children at home  B | Family with children at home  C |
| Position 1 | 99% | 98% | 99% |
| Position 2 | 99%B | 94% | 97%B |
| Position 3 | 90% | 86% | 93%B |
| Position 4 | 84% | 83% | 91%A,B |
| Position 5 | 97% | 94% | 98% |
| Position 6 | 92%B | 86% | 96%A,B |
| Position 7 | 84% | 81% | 89% |
| Position 8 | 82% | 76% | 86%B |

**QE1.** Consider the product shown below. Do you think the orientation and position of the measurement marking on a real product would be…

**Note:** Statistically significant differences between household structures (where a significant difference p<0.05 exists) are indicated by column reference letters A, B and C

**Base:** All respondents saw four positions; sample n for each position ranged from 795-798

**Table 22: Acceptance of differential MM location – food products – by product label usage in-store**

|  |  |  |
| --- | --- | --- |
|  | I look at information on product labels for every / most / some products  A | I look at information on product labels rarely / Only the first time I buy something / Never / Unsure  B |
| Position 1 | 98% | 99% |
| Position 2 | 97% | 96% |
| Position 3 | 90% | 88% |
| Position 4 | 86% | 90% |
| Position 5 | 96% | 98% |
| Position 6 | 91% | 94% |
| Position 7 | 84% | 90%A |
| Position 8 | 79% | 88%A |

**QE1.** Consider the product shown below. Do you think the orientation and position of the measurement marking on a real product would be…

**Note:** Statistically significant differences between those who use labels for every/most/some products and those look at labels rarely/first time they buy something/never/unsure (where a significant difference p<0.05 exists) are indicated by column reference letters A and B

**Base:** All respondents saw four positions; sample n for each position ranged from 795-798

**Table 23: Acceptance of differential MM location – food products – by attention paid to product labels in-store**

|  |  |  |
| --- | --- | --- |
|  | Very high / High / Medium amount of attention paid to information on product labels  A | Very low / low amount of / no attention / Unsure  B |
| Position 1 | 98% | 99% |
| Position 2 | 97% | 96% |
| Position 3 | 90% | 92% |
| Position 4 | 85% | 94%A |
| Position 5 | 96% | 98% |
| Position 6 | 91% | 97%A |
| Position 7 | 84% | 91%A |
| Position 8 | 79% | 92%A |

**QE1.** Consider the product shown below. Do you think the orientation and position of the measurement marking on a real product would be…

**Note:** Statistically significant differences between those who pay a very high/high/medium amount of attention and those who pay a very low/low/no/unsure amount of attention (where a significant difference p<0.05 exists) are indicated by column reference letters A and B

**Base:** All respondents saw four positions; sample n for each position ranged from 795-798

**Non-food products**

**Table 24: Acceptance of differential MM location – non-food products – by age group**

|  |  |  |  |
| --- | --- | --- | --- |
|  | 18-34 years  A | 35-49 years  B | 50 years +  C |
| Position 1 | 98% | 98% | 97% |
| Position 2 | 96% | 97% | 93% |
| Position 3 | 96% | 94% | 93% |
| Position 4 | 89% | 89% | 89% |
| Position 5 | 95%B,C | 90%C | 84% |
| Position 6 | 85%C | 86%C | 70% |
| Position 7 | 88%C | 87%C | 77% |
| Position 8 | 77% | 78% | 71% |

**QE1.** Consider the product shown below. Do you think the orientation and position of the measurement marking on a real product would be…

**Note:** Statistically significant differences between age groups (where a significant difference p<0.05 exists) are indicated by column reference letters A, B and C

**Base:** All respondents saw four positions; sample n for each position ranged from 795-799

**Table 25: Acceptance of differential MM location – non-food products – by gender**

|  |  |  |
| --- | --- | --- |
|  | Male  A | Female  B |
| Position 1 | 97% | 98% |
| Position 2 | 93% | 97%A |
| Position 3 | 93% | 95% |
| Position 4 | 87% | 91% |
| Position 5 | 87% | 90% |
| Position 6 | 75% | 83%A |
| Position 7 | 80% | 86% |
| Position 8 | 74% | 76%A |

**QE1.** Consider the product shown below. Do you think the orientation and position of the measurement marking on a real product would be…

**Note:** Statistically significant differences genders (where a significant difference p<0.05 exists) are indicated by column reference letters A and B

**Base:** All respondents saw four positions; sample n for each position ranged from 795-799

**Table 26: Acceptance of differential MM location – non-food products – by household structure**

|  |  |  |  |
| --- | --- | --- | --- |
|  | Younger single / couple with no children  A | Mature couple or single, no children at home  B | Family with children at home  C |
| Position 1 | 99% | 97% | 98% |
| Position 2 | 96% | 93% | 96% |
| Position 3 | 95% | 93% | 94% |
| Position 4 | 89% | 86% | 91% |
| Position 5 | 91%B | 83% | 92%B |
| Position 6 | 82%B | 71% | 83%B |
| Position 7 | 83% | 78% | 86%B |
| Position 8 | 73% | 70% | 80%B |

**QE1.** Consider the product shown below. Do you think the orientation and position of the measurement marking on a real product would be…

**Note:** Statistically significant differences between household structures (where a significant difference p<0.05 exists) are indicated by column reference letters A, B and C

**Base:** All respondents saw four positions; sample n for each position ranged from 795-799

**Table 27: Acceptance of differential MM location – non-food products – by product label usage in-store**

|  |  |  |
| --- | --- | --- |
|  | I look at information on product labels for every / most / some products  A | I look at information on product labels rarely / Only the first time I buy something / Never / Unsure  B |
| Position 1 | 97% | 99% |
| Position 2 | 95% | 95% |
| Position 3 | 94% | 95% |
| Position 4 | 88% | 92% |
| Position 5 | 88% | 92% |
| Position 6 | 77% | 87%A |
| Position 7 | 82% | 89%A |
| Position 8 | 72% | 83%A |

**QE1.** Consider the product shown below. Do you think the orientation and position of the measurement marking on a real product would be…

**Note:** Statistically significant differences between those who use labels for every/most/some products and those look at labels rarely/first time they buy something/never/unsure (p<0.05) are indicated by letters A and B

**Base:** All respondents saw four positions; sample n for each position ranged from 795-799

**Table 28: Acceptance of differential MM location – non-food products – by shelf information usage in-store**

|  |  |  |
| --- | --- | --- |
|  | I look at information on product shelves for every / most / some products  A | I look at information on product shelves rarely / Only the first time I buy something / Never / Unsure  B |
| Position 1 | 98% | 96% |
| Position 2 | 95% | 94% |
| Position 3 | 95% | 92% |
| Position 4 | 88% | 92% |
| Position 5 | 88% | 93% |
| Position 6 | 77% | 93%A |
| Position 7 | 81% | 93%A |
| Position 8 | 72% | 90%A |

**QE1.** Consider the product shown below. Do you think the orientation and position of the measurement marking on a real product would be…

**Note:** Statistically significant differences between those who use shelf information for every/most/some products and those look at labels rarely/first time they buy something/never/unsure (where a significant difference p<0.05 exists) are indicated by column reference letters A and B

**Base:** All respondents saw four positions; sample n for each position ranged from 795-799

**Table 29: Acceptance of differential MM location – non-food products – by attention paid to product labels in-store**

|  |  |  |
| --- | --- | --- |
|  | Very high / High / Medium amount of attention paid to information on product labels  A | Very low / low amount of / no attention / Unsure  B |
| Position 1 | 97% | 98% |
| Position 2 | 95% | 96% |
| Position 3 | 94% | 96% |
| Position 4 | 88% | 91% |
| Position 5 | 88% | 91% |
| Position 6 | 77% | 88%A |
| Position 7 | 83% | 81% |
| Position 8 | 71% | 87%A |

**QE1.** Consider the product shown below. Do you think the orientation and position of the measurement marking on a real product would be…

**Note:** Statistically significant differences between those who pay a very high/high/medium amount of attention and those who pay a very low/low/no/unsure amount of attention (where a significant difference p<0.05 exists) are indicated by column reference letters A and B

**Base:** All respondents saw four positions; sample n for each position ranged from 795-799

**Table 30: Acceptance of differential MM location – non-food products – by attention paid to shelf information in-store**

|  |  |  |
| --- | --- | --- |
|  | Very high / High / Medium amount of attention paid to information on shelf  A | Very low / Low amount of / No attention / Unsure  B |
| Position 1 | 98% | 95% |
| Position 2 | 95% | 96% |
| Position 3 | 95%B | 90% |
| Position 4 | 88% | 91% |
| Position 5 | 88% | 91% |
| Position 6 | 76% | 90%A |
| Position 7 | 82% | 89% |
| Position 8 | 71% | 88%A |

**QE1.** Consider the product shown below. Do you think the orientation and position of the measurement marking on a real product would be…

**Note:** Statistically significant differences between those who pay a very high/high/medium amount of attention and those who pay a very low/low/no/unsure amount of attention (where a significant difference p<0.05 exists) are indicated by column reference letters A and B

**Base:** All respondents saw four positions; sample n for each position ranged from 795-799

# Appendix : Calculations of Net Benefit

### Rationale For Calculating Net Benefit

Policy reform requires **net benefit** to be calculated for each/all possible policy options (including the status quo) for consideration.

In designing the questionnaire, factors relating to consumer benefit and consumer detriment were included. These are *derived consumer confusion* (Test 2), and *consumer acceptance of variations to the measurement marking location and orientation* (Test 3).

It is important to demonstrate net benefit for the status quo, and for the principles-based approach to regulating the measurement marking.

### Net Benefit Design

Firstly, a measure of confusion was derived in Test 2, for each of the eight variations of the measurement marking position. This confusion was quantified further, by subtracting the overall proportion of correct responses from the incorrect responses for each position.

Secondly, acceptability was measured in Test 3, in relation to each position, and quantified by subtracting the overall proportion of “unacceptable” responses from the net “acceptable” proportion.

A net benefitmeasure for food products and non-food productswas calculated by subtracting overall confusion from overall acceptance of the measurement marking at each of the eight location variations. As some of the confusion measures were negative, the proportions in some circumstances exceed 100%. They have been converted into numbers, to simplify interpretation.

The net benefit measure therefore represents the proportion of people who are accepting and not confused by the measurement marking location and format, for each of the positions tested (1 representing the status quo, and 7 alternative positions under the principles-based approach).

This means that larger numbers represent higher net benefit (larger numbers of people accepting and not confused by the measurement marking location).

# Appendix : Further Subgroup Analyses

The tables below demonstrate where significant differences exist. Results have not been displayed where there are no significant differences.

### Usefulness of Unit Pricing

**Table 31: Usefulness of unit pricing, by age group**

|  |  |  |  |
| --- | --- | --- | --- |
|  | 18-34 years  A | 35-49 years  B | 50 years +  C |
| Not at all useful | 0% | 0% | 1% |
| Not very useful | 1% | 1% | 2% |
| Somewhat useful | 26%B,C | 15% | 11% |
| Moderately useful + Very useful | 73% | 84%A | 86%A |
| *Sample size* | *330* | *318* | *540* |

**QF4:** How useful do you generally find unit pricing is to determine value for money when choosing between product options?

**Note:** Statistically significant differences between age groups (where a significant difference p<0.05 exists) are indicated by column reference letters A, B and C

**Base:** Respondents who reported that they use unit pricing when buying products (QF3) n=1,188

**Table 32: Usefulness of unit pricing, by product label information usage in-store**

|  |  |  |
| --- | --- | --- |
|  | I look at information on product labels for every / most / some products  A | I look at information on product labels rarely / Only the first time I buy something / Never / Unsure  B |
| Not at all useful | 0% | 0% |
| Not very useful | 1% | 2% |
| Somewhat useful | 14% | 31%A |
| Moderately useful + Very useful | 85%B | 67% |
| *Sample size* | *980* | *208* |

**QF4:** How useful do you generally find unit pricing is to determine value for money when choosing between product options?

**Note:** Statistically significant differences between those who use labels for every/most/some products and those look at labels rarely/first time they buy something/never/unsure (where a significant difference p<0.05 exists) are indicated by column reference letters A and B

**Base:** Respondents who reported that they use unit pricing when buying products (QF3) n=1,188

**Table 33: Usefulness of unit pricing, by shelf information usage in-store**

|  |  |  |
| --- | --- | --- |
|  | I look at information on product shelves for every / most / some products  A | I look at information on product shelves rarely / Only the first time I buy something / Never / Unsure  B |
| Not at all useful | 0% | 1% |
| Not very useful | 1% | 3% |
| Somewhat useful | 14% | 42%A |
| Moderately useful + Very useful | 85%B | 54% |
| *Sample size* | *1066* | *102* |

**QF4:** How useful do you generally find unit pricing is to determine value for money when choosing between product options?

**Note:** Statistically significant differences between those who use shelf information for every/most/some products and those look at shelf information rarely/first time they buy something/never/unsure (where a significant difference p<0.05 exists) are indicated by column reference letters A and B

**Base:** Respondents who reported that they use unit pricing when buying products (QF3) n=1,188

**Table 34: Usefulness of unit pricing, by label information attention instore**

|  |  |  |
| --- | --- | --- |
|  | Very high / High / Medium amount of attention paid to information on product labels  A | Very low / Low amount of / No attention / Unsure  B |
| Not at all useful | 0% | 0% |
| Not very useful | 1% | 3%A |
| Somewhat useful | 14% | 31%A |
| Moderately useful + Very useful | 85%B | 66% |
| *Sample size* | *991* | *190* |

**QF4:** How useful do you generally find unit pricing is to determine value for money when choosing between product options?

**Note:** Statistically significant differences between those who pay a very high/high/medium amount of attention and those who pay a very low/low/no/unsure amount of attention (where a significant difference p<0.05 exists) are indicated by column reference letters A and B

**Base:** Respondents who reported that they use unit pricing when buying products (QF3) n=1,181

**Table 35: Usefulness of unit pricing, by shelf information attention in-store**

|  |  |  |
| --- | --- | --- |
|  | Very high / High / Medium amount of attention paid to information on shelf  A | Very low / Low amount of / No attention / Unsure  B |
| Not at all useful | 1% | 0% |
| Not very useful | 1% | 3%A |
| Somewhat useful | 14% | 38%A |
| Moderately useful + Very useful | 85%B | 59% |
| *Sample size* | *1040* | *148* |

**QF4:** How useful do you generally find unit pricing is to determine value for money when choosing between product options?

**Note:** Statistically significant differences between those who pay a very high/high/medium amount of attention and those who pay a very low/low/no/unsure amount of attention (where a significant difference p<0.05 exists) are indicated by column reference letters A and B

**Base:** Respondents who reported that they use unit pricing when buying products (QF3) n=1,188

### Usefulness of the Measurement Marking

**Table 36: Usefulness of measurement marking, by age group**

|  |  |  |  |
| --- | --- | --- | --- |
|  | 18-34 years  A | 35-49 years  B | 50 years +  C |
| Not at all useful | 0% | 1% | 0% |
| Not very useful | 0% | 1% | 1% |
| Somewhat useful | 35%B,C | 17% | 14% |
| Moderately useful + Very useful | 65% | 82%A | 85%A |
| *Sample size* | *299* | *292* | *516* |

**QF5:** How useful do you generally find the measurement marking is to determine value for money when choosing between product options?

**Note:** Statistically significant differences between age groups (where a significant difference p<0.05 exists) are indicated by column reference letters A, B and C

**Base:** Respondents who reported that they use the measurement marking when buying products (QF3) n=1,107

**Table 37: Usefulness of measurement marking, by household structure**

|  |  |  |  |
| --- | --- | --- | --- |
|  | Younger single / couple with no children  A | Mature couple or single, no children at home  B | Family with children at home  C |
| Not at all useful | 0% | 1% | 0% |
| Not very useful | 1% | 2% | 1% |
| Somewhat useful | 20% | 14% | 25%B |
| Moderately useful + Very useful | 79% | 84%C | 74% |
| *Sample size* | *271* | *373* | *443* |

**QF5:** How useful do you generally find the measurement marking is to determine value for money when choosing between product options?

**Note:** Statistically significant differences between different household structures (where a significant difference p<0.05 exists) are indicated by column reference letters A, B and C

**Base:** Respondents who reported that they use the measurement marking when buying products (QF3) n=1,107

**Table 38: Usefulness of measurement marking, by product label information usage in-store**

|  |  |  |
| --- | --- | --- |
|  | I look at information on product labels for every / most / some products  A | I look at information on product labels rarely / Only the first time I buy something / Never / Unsure  B |
| Not at all useful | 0% | 1% |
| Not very useful | 1% | 2% |
| Somewhat useful | 19% | 30%A |
| Moderately useful + Very useful | 80%B | 67% |
| *Sample size* | *924* | *183* |

**QF5:** How useful do you generally find the measurement marking is to determine value for money when choosing between product options?

**Note:** Statistically significant differences between those who use labels for every/most/some products and those look at labels rarely/first time they buy something/never/unsure (where a significant difference p<0.05 exists) are indicated by column reference letters A and B

**Base:** Respondents who reported that they use the measurement marking when buying products (QF3) n=1,107

**Table 39: Usefulness of measurement marking, by shelf information usage in-store**

|  |  |  |
| --- | --- | --- |
|  | I look at information on product shelves for every / most / some products  A | I look at information on product shelves rarely / Only the first time I buy something / Never / Unsure  B |
| Not at all useful | 0% | 0% |
| Not very useful | 1% | 3%A |
| Somewhat useful | 18% | 36%A |
| Moderately useful + Very useful | 80%B | 61% |
| *Sample size* | *978* | *129* |

**QF5:** How useful do you generally find the measurement marking is to determine value for money when choosing between product options?

**Note:** Statistically significant differences between those who use shelf information for every/most/some products and those look at shelf information rarely/first time they buy something/never/unsure (where a significant difference p<0.05 exists) are indicated by column reference letters A and B

**Base:** Respondents who reported that they use the measurement marking when buying products (QF3) n=1,107

**Table 40: Usefulness of measurement marking, by label information attention in-store**

|  |  |  |
| --- | --- | --- |
|  | Very high / High / Medium amount of attention paid to information on product labels  A | Very low / Low amount of / No attention / Unsure  B |
| Not at all useful | 0% | 1% |
| Not very useful | 1% | 1% |
| Somewhat useful | 18% | 34%A |
| Moderately useful + Very useful | 81%B | 64% |
| *Sample size* | *937* | *170* |

**QF5:** How useful do you generally find the measurement marking is to determine value for money when choosing between product options?

**Note:** Statistically significant differences between those who pay a very high/high/medium amount of attention and those who pay a very low/low/no/unsure amount of attention (where a significant difference p<0.05 exists) are indicated by column reference letters A and B

**Base:** Respondents who reported that they use the measurement marking when buying products (QF3) n=1,107

**Table 41: Usefulness of measurement marking, by shelf information attention in-store**

|  |  |  |
| --- | --- | --- |
|  | Very high / High / Medium amount of attention paid to information on shelf  A | Very low / Low amount of / No attention / Unsure  B |
| Not at all useful | 0% | 1% |
| Not very useful | 1% | 2% |
| Somewhat useful | 17% | 37%A |
| Moderately useful + Very useful | 81%B | 60% |
| *Sample size* | *943* | *157* |

**QF5:** How useful do you generally find the measurement marking is to determine value for money when choosing between product options?

**Note:** Statistically significant differences between those who pay a very high/high/medium amount of attention and those who pay a very low/low/no/unsure amount of attention (where a significant difference p<0.05 exists) are indicated by column reference letters A and B

**Base:** Respondents who reported that they use the measurement marking when buying products (QF3) n=1,100

### Agreement that Government Regulation of the Measurement Marking is Needed

**Table 42: Agreement that the orientation and location of the measurement marking requires Government regulation, by age group**

|  |  |  |  |
| --- | --- | --- | --- |
|  | 18-34 years  A | 35-49 years  B | 50 years +  C |
| Agree + Strongly agree | 60% | 65% | 75%A,B |
| Neither agree nor disagree | 29%C | 25%C | 18% |
| Disagree + Strongly disagree | 6% | 6% | 6% |
| Unsure | 5%C | 3%C | 1% |
| *Sample size* | *452* | *453* | *688* |

**QF6.** Do you agree or disagree that Government regulation is needed for the orientation and position of the measurement mark?

**Note:** Statistically significant differences between age groups (where a significant difference p<0.05 exists) are indicated by column reference letters A, B and C

**Base:** All respondentsn=1,593

**Table 43: Agreement that the orientation and location of the measurement marking requires Government regulation, by product label information usage in-store**

|  |  |  |
| --- | --- | --- |
|  | I look at information on product labels for every / most / some products  A | I look at information on product labels rarely / Only the first time I buy something / Never / Unsure  B |
| Agree + Strongly agree | 74%B | 48% |
| Neither agree nor disagree | 20% | 37%A |
| Disagree + Strongly disagree | 4% | 11%A |
| Unsure | 3% | 5% |
| *Sample size* | *1242* | *351* |

**QF6.** Do you agree or disagree that Government regulation is needed for the orientation and position of the measurement mark?

**Note:** Statistically significant differences between those who use labels for every/most/some products and those look at labels rarely/first time they buy something/never/unsure (where a significant difference p<0.05 exists) are indicated by column reference letters A and B

**Base:** All respondentsn=1,593

**Table 44: Agreement that the orientation and location of the measurement marking requires Government regulation, by shelf information usage in-store**

|  |  |  |
| --- | --- | --- |
|  | I look at information on product shelves for every / most / some products  A | I look at information on product shelves rarely / Only the first time I buy something / Never / Unsure  B |
| Agree + Strongly agree | 72%B | 48% |
| Neither agree nor disagree | 21% | 36%A |
| Disagree + Strongly disagree | 5% | 11%A |
| Unsure | 3% | 5% |
| *Sample size* | *1339* | *254* |

**QF6.** Do you agree or disagree that Government regulation is needed for the orientation and position of the measurement mark?

**Note:** Statistically significant differences between those who use shelf information for every/most/some products and those look at shelf information rarely/first time they buy something/never/unsure (where a significant difference p<0.05 exists) are indicated by column reference letters A and B

**Base:** All respondentsn=1,593

**Table 45: Agreement that the orientation and location of the measurement marking requires Government regulation, by product label information attention in-store**

|  |  |  |
| --- | --- | --- |
|  | Very high / High / Medium amount of attention paid to information on product labels  A | Very low / Low amount of / No attention / Unsure  B |
| Agree + Strongly agree | 73%B | 49% |
| Neither agree nor disagree | 20% | 36%A |
| Disagree + Strongly disagree | 5% | 10%A |
| Unsure | 2% | 5%A |
| *Sample size* | *1254* | *308* |

**QF6.** Do you agree or disagree that Government regulation is needed for the orientation and position of the measurement mark?

**Note:** Statistically significant differences between those who pay a very high/high/medium amount of attention and those who pay a very low/low/no/unsure amount of attention (where a significant difference p<0.05 exists) are indicated by column reference letters A and B

**Base:** All respondentsn=1,562

**Table 46: Agreement that the orientation and location of the measurement marking requires Government regulation, by shelf information attention in-store**

|  |  |  |
| --- | --- | --- |
|  | Very high / High / Medium amount of attention paid to information on shelf  A | Very low / Low amount of / No attention / Unsure  B |
| Agree + Strongly agree | 72%B | 50% |
| Neither agree nor disagree | 20% | 38%A |
| Disagree + Strongly disagree | 5% | 10%A |
| Unsure | 3% | 2% |
| *Sample size* | *1304* | *260* |

**QF6.** Do you agree or disagree that Government regulation is needed for the orientation and position of the measurement mark?

**Note:** Statistically significant differences between those who pay a very high/high/medium amount of attention and those who pay a very low/low/no/unsure amount of attention (where a significant difference p<0.05 exists) are indicated by column reference letters A and B

**Base:** All respondentsn=1,564

# Appendix : Shopping Behaviour

**Table 47: Shopping Behaviour – Frequency of shopping at store types**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | Daily | Weekly | Fortnightly | Monthly | Every 2-3 months | Less often | Never |
| Supermarket | 13% | 72% | 11% | 3% | 0% | 0% | 0% |
| Liquor store | 1% | 19% | 17% | 19% | 14% | 17% | 13% |
| Pharmacy | 2% | 12% | 24% | 39% | 14% | 8% | 1% |
| Hardware store | 1% | 8% | 14% | 27% | 26% | 22% | 2% |

**QB1:** How often do you shop at a…

**Base:** All respondentsn=1,593

**Table 48: Shopping Behaviour – Frequency of purchasing product types**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | Daily | Weekly | Fortnightly | Monthly | Every 2-3 months | Less often | Never |
| Cheese | 1% | 30% | 35% | 22% | 6% | 5% | 1% |
| Sauce | 1% | 8% | 17% | 33% | 26% | 12% | 2% |
| Savoury snacks | 3% | 28% | 28% | 17% | 11% | 10% | 3% |
| Sunscreen | 1% | 3% | 3% | 10% | 25% | 52% | 5% |
| Insect spray | 1% | 4% | 5% | 17% | 31% | 39% | 3% |
| Distilled spirits | 1% | 5% | 5% | 12% | 14% | 34% | 28% |

**B2:** How often do you buy...

**Base:** All respondentsn=1,593

**Table 49: Shopping Behaviour – Use of label and shelf information**

|  |  |  |
| --- | --- | --- |
|  | When shopping, for each product, how often do you look at information on the product labels or packages?  A | B) When shopping, for each product, how often do you look at information on shelves? |
| For every product + For most products | 44% | 55%A |
| For some products | 33%b | 28% |
| Rarely | 15%b | 12% |
| Only the first time I buy something | 6%B | 2% |
| Never | 1% | 1% |
| Unsure | 1% | 1% |

**QF1:** When you are shopping at the supermarket, for each product you consider buying, how often do you look at…

**Note:** Statistically significant differences between those who look at information on the product labels and those who look at information on shelves (where a significant difference p<0.05 exists) are indicated by column reference letters A and B

**Base:** All respondentsn=1,593

**Table 50: Shopping Behaviour – Attention paid to label and shelf information**

|  |  |  |
| --- | --- | --- |
|  | A) How much attention do you pay to information on product labels or packages? | B) How much attention do you pay to information on shelves? |
| High amount of attention + Very high amount of attention | 40% | 47%A |
| Medium amount of attention | 40%b | 36% |
| Very low amount of attention + Low amount of attention | 19%b | 16% |
| No attention | 1% | 1% |
| Unsure | 1% | 0% |
| *Sample size* | *1562* | *1564* |

**QF2:** How much attention do you pay to…

**Note:** Statistically significant differences between those who look at information on the product labels and those who look at information on shelves (where a significant difference p<0.05 exists) are indicated by column reference letters A and B

**Base:** All respondents who reported looking at information on products and / or shelvesn=1,562-1,564

# Appendix : Usage of Information on Labels and Shelves

People were asked what information they looked for on the shelf and on the product package or label when buying from the categories of foods tested in the survey. In general, information on the shelf tended to be looked for more than information on the product itself.

The price of the product was looked for the most for both product categories (food: 85%; non-food: 79%), followed by product promotions (food: 73%; non-food: 64%).

**Figure 19: Shelf information looked at for food and non-food products**

**QF3.** When you are buying products such as those below [sauces, savoury snack foods, dairy foods, sunscreen, distilled spirits, insect spray], which information do you generally look for?

**Base:** All respondentsn=1,593

When looking at attention to information on food products, the highest proportion reported looking for the brand name (63%), followed by the measurement marking (62%). The pattern was similar for non-food products (55% reported looking for the brand name, and 50% reported looking for the measurement mark).

**Figure 20: Product/label information looked at on food and non-food products**

**QF3.** When you are buying products such as those below [sauces, savoury snack foods, dairy foods, sunscreen, distilled spirits, insect spray], which information do you generally look for?

**Base:** All respondentsn=1,593

# Appendix : Sample Details

**Table 51: Demographics – Grocery buying status by gender**

|  |  |  |  |
| --- | --- | --- | --- |
|  | Male  (n=718) | Female  (n=875) | Total  (n=1,593) |
| Yes | 53% | 75% | 65% |
| Yes – equally with at least one other person | 40% | 19% | 28% |
| No | 7% | 6% | 6% |
| Unsure | 0% | 0% | 0% |

**QG2:** Are you the person most responsible for the household grocery shopping? by S2. Gender

**Base:** All respondentsn=1,593

**Table 52: Demographics – Age by gender**

|  |  |  |  |
| --- | --- | --- | --- |
|  | Male  (n=718) | Female  (n=875) | Total  (n=1,593) |
| 18-24 | 7% | 15% | 12% |
| 25-29 | 7% | 9% | 8% |
| 30-34 | 9% | 8% | 9% |
| 35-39 | 10% | 9% | 9% |
| 40-44 | 10% | 10% | 10% |
| 45-49 | 10% | 9% | 9% |
| 50-54 | 9% | 8% | 8% |
| 55-59 | 8% | 8% | 8% |
| 60 and over | 30% | 25% | 27% |

**QS1:** Age by S2. Gender

**Base:** All respondentsn=1,593

**Table 53: Demographics – Household Status**

|  |  |
| --- | --- |
|  | Total  (n=1,593) |
| Single or couple (under 30), no children | 10% |
| Single or couple (over 30) no children | 14% |
| Family, with youngest child under 6 | 12% |
| Family, with youngest child under 13 | 11% |
| Family, with teenage or older children at home | 19% |
| Mature couple or single, no children at home | 32% |
| Prefer not to answer | 2% |

**QG1:** Which of the following best describes your HOUSEHOLD?

**Base:** All respondentsn=1,593

**Table 54: Demographics – Work Status**

|  |  |
| --- | --- |
|  | Total  (n=1,593) |
| Work full time | 33% |
| Work part time | 19% |
| Home duties | 10% |
| Unemployed/looking for work | 5% |
| Retired | 21% |
| Student | 8% |
| Not working because of work related injury | 1% |
| Other (SPECIFY) | 3% |
| Prefer not to answer | 1% |

**QG2B:** Which of the following best describes what you do?

**Base:** All respondentsn=1,593

**Table 55: Demographics – Work Setting**

|  |  |
| --- | --- |
|  | Total  (n=1,593) |
| Office | 48% |
| Retail / Shop | 13% |
| Factory / Workshop | 6% |
| Education and training | 12% |
| Outdoors | 7% |
| Mobile | 2% |
| Other, specify | 9% |
| Prefer not to answer | 2% |

**QG3:** In what sort of setting do you work?

**Base:** All respondentsn=1,593

**Table 56: Demographics – Household Income**

|  |  |
| --- | --- |
|  | Total  (n=1,593) |
| Less than $50,000 | 36% |
| $50,001-$100,000 | 30% |
| $100,001-$150,000 | 15% |
| More than $150,000 | 7% |

**QG4:** Approximately, what is your HOUSEHOLD income per year, before tax?

**Base:** All respondentsn=1,593

# Appendix : Qualitative Intercept Interview Guide

Department of Industry and Science

Measurement marking research

Draft intercept interview v5 01-10-15

Research background in brief

|  |
| --- |
| Key project objectives this stage will address:   1. Understanding the relative **usage** and **importance** of all labelling components (including the measurement marking) when making a purchase decision in situ (e.g. supermarkets, bottle shops, pharmacies, and hardware stores) across a series of FMCG products (pre-packaged foods and beverages, alcoholic beverages, cosmetics and aerosols). 2. Understanding relative to other labelling elements, the importance of the location, size and orientation of the measurement marking (currently on the primary display panel (front) on these products). 3. Determining the levels of consumer interest, concern and potential confusion that may be associated with a change in location, size and orientation of the measurement marking. |

Interview process

Before interviews

1. We require the Department to provide a letter of introduction we can take to the identified venues, to seek permission to undertake the intercept interviews at the point of decision (i.e. in the aisle). Phone calls will be made ahead of visits to identified locations.

From past experience, it is important for the Department to assist with this permission process.

In store

1. Interviewers will present a hard copy of the letter to the manager of each store to ensure permission for 1-2 interviews per site.
2. Interviewers will intercept consumers just after they make a relevant pre-packaged product selection. (In supermarkets we will intercept consumers who also already have several other items in a basket or trolley.)
3. Interviewer will seek informed consent to undertake a 15 minute interview.
4. Interviewers would provide each participant with $10 cash or in-store credit to reimburse them for their time.

Interview schedule

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Initial qualitative intercept study** | | | | **Stage 2 Dates** | | |
| Department composes and sends research approval letter | | | | ASAP – to be sent by Thursday 1st October | | |
| Development and approval of intercept interview guide | | | | Wed 30th - Thurs 1st October | | |
| Intercept study fieldwork | | | | Friday 2nd – Wednesday 7th October | | |
| Verbal debrief of findings to the Department | | | | Friday 9th October | | |
|  | | | |  | | |
|  | Supermarket | Off-licence | Pharmacy | | Hardware | **TOTAL** | |
| ADELAIDE  Lower SES  (Noarlunga/ Christies Beach; Marion/ Oaklands Park/ Somerton Park) | 2 | 1 | 1 | | 1 | **5** | |
| 2 | 1 | 1 | | 1 | **5** | |
| ADELAIDE  Higher SES  (Glenside/ Glenunga; Malvern) | 2 | 1 | 1 | | 1 | **5** | |
| 2 | 1 | 1 | | 1 | **5** | |
| CANBERRA  Higher SES  (Yarralumla) | 1 |  | 1 | |  | **2** | |
| CANBERRA  Lower SES (Condor/Phillip) | 1 | 1 |  | | 1 | **3** | |
| **TOTAL** | **10** | **5** | **5** | | **5** | **25** | |

Note: Interviewers will ensure a range of participants are interviewed – variations in age group, gender, shopping with dependants.

Packaged FMCG categories

**Food and beverage**[[3]](#footnote-3)

1. Dairy products – milk, cream, yoghurt, cheese, dairy-based desserts (e.g. ice cream)
2. Fats and oils – butter, margarine, blends
3. Fruits and veg – fresh, processed (frozen, dried, canned, jams/jellies, spreads, candied fruit , fruit preparations, fruit-based desserts, fermented, fruit fillings, cooked fruit,
4. Confectionary
5. Cereals and cereal products – whole, broken or flaked grain, flours, starches, pastas and noodles, batters, rice and rice products, soybean products,
6. Bakery wares – breads and rolls, crackers, other bakery products, fine bakery wares (cakes, cookies, pies, etc)
7. Foodstuffs for particular nutritional uses – infant formulae, complementary foods, dietetic foods (medical and weight reduction), food supplements
8. Meat and meat products – fresh, processed, (e.g. cured, heat-treated, frozen)
9. Fish and fish products – fresh, processed, cooked, semi-preserved
10. Eggs – fresh, egg products, including egg-based desserts (custard)
11. Sweeteners – sugars, honey
12. Salts, spices/herbs, soups, sauces, protein products
13. Beverages (excluding dairy) – waters, fruit and veg juices/nectars, sport, energy drinks, coffee, tea
14. Ready to eat savoury – snacks, nuts

**Alcoholic beverages** (excluding wine)[[4]](#footnote-4)

1. Beer
2. Distilled spirits
3. Liqueurs
4. RTDs

**Personal care**

1. Cosmetics – moisturisers, sunscreens, makeup, nail polish[[5]](#footnote-5), face & body products
2. Aerosol deodorants

**Cleaning / gardening / home maintenance products**

1. Aerosols
2. Paints

Intercept interview guide

1. This guide is based on a supermarket setting

(THERE MAY BE SOME EDITS FOR OTHER SETTINGS)

**Determine purpose of shopping and general shopping behaviour (1 min)**

1. Tell me a bit about what you’re shopping for today?
2. What type of ‘shop’ is this for you?
   1. E.g. main shop, top-up shop, specific event-based, recipe-based, smaller ad hoc
3. How often do you generally shop at a [current location, e.g. supermarket, hardware store, etc.]?
4. Who are you buying for today?
5. E.g. self, your family, children, guests, other…
6. How many family members? Dependants?
7. Are you shopping from a list today?

**Investigate decision-making processes (4 mins)**

1. Roughly how much of your shop is made-up of ‘regular’ products – things you always/usually buy, and how much is made up of new things you haven’t bought before?

Can you please show me some examples *[in your trolley]* of products you regularly buy…

1. Thinking about the types of products you **regularly buy**, how do you decide which specific one to pick when shopping? What factors determine your choice between different options of the things you need to buy?

What about **new products**, or **things you don’t usually buy** and are trying – can you point to some of these *[in your trolley]*…

1. How do you choose them? What influences your decisions?

General hierarchy of decision-making criteria when purchasing products

UNPROMPTED (Q7 & 8)

|  |  |  |  |
| --- | --- | --- | --- |
| Q7 Examples of regular purchases | Q7 Consumer’s decision making factors | Q8 Examples of new / irregular purchases | Q8 Consumer’s decision making factors |
|  |  |  | 1. |
|  |  |  | 2. |
|  |  |  | 3. |
|  |  |  | 4. |
|  |  |  | 5. |
|  |  |  | 6. |
|  |  |  | 7. |
|  |  |  | 8. |
|  |  |  | 9. |
|  |  |  | 10. |

*Focus on one regular purchase*

1. Can you tell me a bit about this \_\_\_\_\_\_\_\_\_\_ product….why you’ve bought it, how you picked this particular one instead of a different \_\_\_\_\_\_\_\_, what helped you make your choice?
2. Is that all? Were there any other factors?

*Listen for spontaneous mentions of label readership and unit pricing*

*Focus on one novel / irregular purchase*

1. Can you tell me a bit about this \_\_\_\_\_\_\_\_\_\_ product….why you’ve bought it, how you picked this particular one instead of a different \_\_\_\_\_\_\_\_, what helped you make your choice?
2. Is that all? Were there any other factors?

General hierarchy of decision-making criteria when purchasing products

PROMPTED (Q9 & 10)

|  |  |  |  |
| --- | --- | --- | --- |
| Q9 Example of regular purchase | Q9 Consumer’s decision making factors | Q10 Example of new / irregular purchase | Q10 Consumer’s decision making factors |
|  |  |  | 1. |
|  | 2. |
|  | 3. |
|  | 4. |
|  | 5. |
|  | 6. |
|  | 7. |
|  | 8. |
|  | 9. |
|  | 10. |

**Label use (3 mins)**

1. Do you look at and read any information on the pack or label when choosing what to buy?

*IF NO*

* 1. Why not?

*IF YES*

1. Are there any products *[in your trolley]* today where you read the information on the packs or labels? *Distinguish between which product categories packaging is looked at vs not looked at*
2. How come?

*If not already covered by product type*

1. When are you **more** **likely** to read the information on the packs and labels? Why is this? *Probe fully and note mentions of familiarity vs first purchase; price; buying for self vs others / children*
2. When are you **less likely** to read the information on the packs and labels? Why is this?
3. Which parts of the package or label information do you generally read? Is there anything you instantly look for?

*Note mentions of front of package (e.g. brand, size, claims) vs back of package elements (NIP, ingredients, allergens); mandatory vs voluntary information)*

1. In general, what information do you expect to get from the front of the pack?
2. When is it you start looking or reading pack or label information in more detail? E.g. before choosing? When comparing? At home?

*If not already covered by participant spontaneously (in Q8 or Q10)*

1. What about when you’re looking for a specific product type but not a specific brand, how do you compare them? (e.g. What would you look for in a bag of potato chips / can of tomatoes / bottle of spirits / deodorant / body lotion / can of paint?)

*Present the customer with two or more products or refer to products around you, ask consumer to demonstrate how they would choose between multiple products for the best value to them. Ask them to describe what they are looking at: pictures, logo, nutrition, measurement marking etc. Basically get the consumer to describe their thought process. Do they start with looking at the price, then the size, then the nutrition etc.*

*Probe: so on this wall of example: (Chips) if you were buying for (use scenario presented earlier by consumer- family, party etc) which chips would you choose?*

**Use of and general sentiment towards measurement marking (4 mins)**

*Select two-three products from different categories, (IF POSSIBLE those for which participant said they looked at packaging/labelling)*

1. Can you show me the measurement / volume marking on this\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ *[product]*? *Note how easy / hard; quick / slow this is to locate and any questions asked*
2. Did you look at this before deciding whether to buy it? How come?

*IF YES*

* 1. In what way did you use it?
  2. Did it tell you what you wanted to know?

1. Were there any (other) products *[in the trolley]* where you looked at the measurement marking today? How come?

*IF YES*

* 1. How important is the measurement marking in your decision to buy products such as these? *Ascertain which factors would come first, and where it would sit in the hierarchy*

1. When would you be **more likely** use it? How come? *Determine if this relates to certain product types*
2. Can you recall a recent example when you used the measurement marking when choosing a product? *Probe – what were you buying and why was the measurement marking used?*
3. When would you be **less likely** to use it? How come?
4. How important do you feel the measurement marking is overall?

**Unit pricing (2 mins)**

1. Do you use the unit pricing information on shelves?

*IF NO*

1. How come?
2. Would you ever use it?

*IF YES*

1. When are you **more likely** you use it? How come? *Determine if this relates to certain product types/categories; needs from product/ scenario*
2. When are you **less likely** to use it? How come?
3. Do you think the unit pricing information provides the same information as the pack measurement marking?
   * + - Is it more or less helpful?
       - Which are you most likely to use? Why?
       - Do you use the two in the same way or different ways?

**Potential changes (1 min)**

*Select a “new” or generic product from trolley where possible. If possible refer to a product where the measurement marking was used by the participant*

How would you feel…

* 1. if the measurement mark’s orientation changed from being in line with the design to being on its side? How come?
  2. if the measurement marking moved to the back of the packet in the same location as the front? How come?
  3. if the measurement marking was placed on the folded over seam or in the bar code? How come?

Is there anywhere that the measurement marking shouldn’t be allowed to be placed? How come?

How would you feel if the measurement marking was half the size of what it is now?

How come?

**Thank you and close**

**Provide $10 voucher or cash in envelope**

**Initial post-interview part of consent form**

# Appendix : Quantitative Questionnaire

Department of Industry and Science

Questionnaire

**About this survey**

**What is the purpose of this survey?**

This survey is part of a study being conducted by the Australian Government Department of Industry, Innovation and Science. We are seeking the opinions of a broad cross section of the community to understand the perceptions and expectations of our society.

**Will my survey answers be kept confidential?**

The information you provide in the survey will be treated as private and confidential. No individual respondent will be able to be identified from the research results. Your answers will only be used for the purposes of the research, and results will be presented to the owner of the survey in aggregate form. The survey is guaranteed to be confidential under the force of Australian Privacy Legislation, and as soon as the final data has been checked and verified, all identifying details will be permanently deleted.

**Privacy policy**

ORIMA Research complies with the Australian Privacy Principles contained in the Privacy Act 1988 in relation to the collection and use of survey data. Our Privacy Policy is available at <http://www.orima.com.au/home/privacy-policy/> and contains further details regarding how you can access or correct information ORIMA holds about you, how you can make a privacy related complaint and how that complaint will be dealt with. Should you have any questions about our privacy policy or how we will treat your information, you may contact our Privacy Officer, Liesel van Straaten on (03) 9526 9000 or by email: [liesel.vanstraaten@orima.com](mailto:liesel.vanstraaten@orima.com).

ORIMA Research will not disclose any identifiable research information for a purpose other than conducting our research or to overseas recipients unless we have your express prior consent or are required to do so by an Australian law.

Until we de-identify our research records, you have the right to access the information that we hold about you as a results of this survey. You may request at any time to have this information de-identified or destroyed.

**Questions?**

For further information on the research, you can contact David Bruce at ORIMA on 02 6109 6300 or the Department of Industry, Innovation and Science by email to [packagingreview@industry.gov.au](mailto:packagingreview@industry.gov.au).

|  |
| --- |
| **PROGRAMMING INSTRUCTION**  Quotas are set for age, gender and location. See excel attachment labelled 2949 DIS sample structure. |

1. Quota / screener questions

S1. Which of the following age groups do you belong to? **SR**

1. Under 18 CLOSE
2. 18-24 CONTINUE (QUOTA CHECK)
3. 25-29 CONTINUE (QUOTA CHECK)
4. 30-34 CONTINUE (QUOTA CHECK)
5. 35-39 CONTINUE (QUOTA CHECK)
6. 40-44 CONTINUE (QUOTA CHECK)
7. 45-49 CONTINUE (QUOTA CHECK)
8. 50-54 CONTINUE (QUOTA CHECK)
9. 55-59 CONTINUE (QUOTA CHECK)
10. 60 and over CONTINUE (QUOTA CHECK)
11. Prefer not to answer CLOSE

S2. What is your gender? **SR**

1. Male CONTINUE (QUOTA CHECK)
2. Female CONTINUE (QUOTA CHECK)
3. Prefer not answer CLOSE

S3. In which state do you live? SR

1. Australian Capital Territory (ACT) CONTINUE (QUOTA CHECK)
2. New South Wales (NSW) CONTINUE (QUOTA CHECK)
3. Northern Territory (NT) CONTINUE (QUOTA CHECK)
4. Queensland (QLD) CONTINUE (QUOTA CHECK)
5. South Australia (SA) CONTINUE (QUOTA CHECK)
6. Tasmania (TAS) CONTINUE (QUOTA CHECK)
7. Victoria (VIC) CONTINUE (QUOTA CHECK)
8. Western Australia (WA) CONTINUE (QUOTA CHECK)

98. Prefer not to answer CLOSE

S4. Which of the following best describes your location? **SR**

1. Metropolitan area CONTINUE (QUOTA CHECK)
2. Inner regional location CONTINUE (QUOTA CHECK)
3. Outer Regional / Remote / Very Remote location CONTINUE (QUOTA CHECK)

98. Prefer not to answer CLOSE

1. Filter / context questions

B1. How often do you shop at a:

*RANDOMISE*

1. Supermarket
2. Liquor store
3. Pharmacy
4. Hardware store

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Daily | Weekly | Fortnightly | Monthly | Every 2-3 months | Less often | Never |
| 1 | 2 | 3 | 4 | 5 | 6 | 9  Abort if never for all shop types |

B2. How often do you buy the following types of products?

*RANDOMISE*

1. Cheese
2. Sauce, e.g. tomato sauce
3. Savoury snacks, e.g. potato chips
4. Sunscreen
5. Insect spray
6. Distilled spirits, e.g. gin

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Daily | Weekly | Fortnightly | Monthly | Every 2-3 months | Less often | Never |
| 1 | 2 | 3 | 4 | 5 | 6 | 9  Abort if never for a, b & c OR if never for d, e & f |

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **PROGRAMMING INSTRUCTION**   * EACH OF THE n=1500 RESPONDENTS WILL ANSWER SECTION C, D AND E FOR **2 OF THE 6** PRODUCT TYPES - 1 eligible product at random from Category 1 and 1 eligible product at random from Category 2   + Category 1 - Food     - Cheese n=500 evaluations in sections C, D and E     - Tomato sauce n=500 evaluations in sections C, D and E     - Potato chips n=500 evaluations in sections C, D and E   + Category 2 – non-food     - Sunscreen n=500 evaluations in sections C, D and E     - Insect Aerosol n=500 evaluations in sections C, D and E     - Spirits n=500 evaluations in sections C, D and E * EACH RESPONDENT MUST EVALUATE THE **SAME 2 PRODUCTS** ACROSS SECTIONS C, D AND E * QB2. ACTS AS A FILTER QUESTION. AS LONG AS THE RESPONDENT HAS SELECTED A RESPONSE OTHER THAN ‘NEVER’ FOR A PRODUCT AT QB2, THEY CAN BE EXPOSED TO THAT PRODUCT  |  |  | | --- | --- | | Cheese | IF NOT NEVER IN QB2a: OK TO EXPOSE TO CHEESE TEST PRODUCT  (n=500) | | Sauce, e.g. tomato sauce | IF NOT NEVER IN QB2b: OK TO EXPOSE TO TOMATO SAUCE TEST PRODUCT (n=500) | | Savoury snacks, e.g. chips | IF NOT NEVER IN QB2c: OK TO EXPOSE TO CHIPS TEST PRODUCT (n=500) | | Sunscreen | IF NOT NEVER IN QB2d: OK TO EXPOSE TO SUNSCREEN TEST PRODUCT (n=500) | | Insect spray | IF NOT NEVER IN QB2e: OK TO EXPOSE TO HARDWARE TEST PRODUCT (n=500) | | Distilled spirits, e.g. gin | IF NOT NEVER IN QB2f: OK TO EXPOSE TO SPIRITS TEST PRODUCT  (n=500) |  * SECTIONS F AND G ARE ANSWERED BY ALL RESPONDENTS |

1. Test 1: Relative importance of MM compared to other FOP information

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **PROGRAMMING INSTRUCTION**  For each product:   * Participants will be exposed to a series of 5 tasks * Each task will contain 4 product images (front of pack only) * For each task respondents are asked which pack is found to be most and least useful * An example ‘Task’ is shown below  |  |  |  |  |  | | --- | --- | --- | --- | --- | |  |  |  |  |  | | MOST USEFUL (SR) |  |  |  |  | | LEAST USEFUL  (SR) |  |  |  |  |  * The excel file labelled ‘copy of maxdiff design’ details which images need to go in which order in which tasks. * The images required are in the word file labelled ‘Test 1. MaxDiff variable table with images’ * (individual jpegs of each image are also available if required) |

***The next five pages will show you a series of four similar but different images per page. On each page you will be asked to select the one which you would find the most useful, and the one which you would find the least useful in a purchase situation.***

C1. Of the FOUR product packs shown below, which do you think is MOST useful, and which is LEAST useful in deciding what to buy?

|  |
| --- |
| **PROGRAMMING INSTRUCTION**  C1 is asked for each of the 5 tasks for Product 1  C1 – C5 Is then repeated for Product 2 [FROM **OPPOSITE** CATEGORY]:   * + Category 1 - Food     - Cheese n=500 evaluations in sections C, D and E     - Tomato sauce n=500 evaluations in sections C, D and E     - Potato chips n=500 evaluations in sections C, D and E   + Category 2 – non-food     - Sunscreen n=500 evaluations in sections C, D and E     - Insect Aerosol n=500 evaluations in sections C, D and E     - Spirits n=500 evaluations in sections C, D and E   After the second product, respondent moves on to section D (and answers it for the same 2 products) |

1. Test 2: Confusion and poor choice for differential MM location

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **PROGRAMMING INSTRUCTION**   * Section D is answered for the **same** 2 product types as section C * There are 2 ‘pairs’ for each product, and 4 options within each pair * Participants will be exposed to a Pair 1 test and a Pair 2 test for Product 1 **and** a Pair 1 test and a Pair 2 for Product 2 * 50% of participants do PAIR 1 first and 50% do PAIR 2 first * Across Product 1 and Product 2, the four pair tests each respondent sees must include **all** of the 4 options * In each pair one product will be an ‘on-special product’, the other will vary in terms of how the measurement marking (e.g. mls/gms) is positioned on pack * An example of a pair is shown below  |  |  |  | | --- | --- | --- | |  |  |  | | I would buy (SR) |  |  |  * Respondents will be randomly allocated to ONE of the 4 ‘pair one’ options and then randomly allocated to a DIFFERENT ONE of the 4 ‘pair 2’ options (ensuring an even number of evaluations for each option overall) * The images required are in the word file labelled ‘Test 2. Details table with images’ * (individual jpegs of each image are also available if required) |

QD1. Of the two products shown below, which one would you buy?

|  |
| --- |
| **PROGRAMMING INSTRUCTION**  D1 is asked for each of the 2 pairs for Product 1  D1 – D2 Is then repeated for Product 2  For Product 2 the respondent sees the two options **not** shown for Product 1  After the second product, respondent moves on to section E (and answers it for the same 2 products) |

1. Test 3: Acceptability of MM location flexibility

|  |
| --- |
| **PROGRAMMING INSTRUCTION**   * Section E is answered for the **same** 2 product types as section C and section D * There are 8 variants for each of the products (P1, P2,…,P7, P8) * Participants will be exposed to 4 individual images per product type (one at a time, randomised order) * Each image will vary in terms of how the measurement marking (e.g. mls/gms) is positioned on pack * Each respondents will see 4 images for each of the 2 product types   + Randomly select 4 of the 8 options for Product 1   + Show the **other** 4 options in random order for Product 2 * Images are in word file labelled. ‘Test 3. Details with Images’ * (individual jpegs of each image are also available if required) * Participants will not be allowed to go back from this point onwards. |

The **Measurement marking** shows the volume or weight of a product usually in millilitres (ml) or grams (g).

QE1. Consider the product shown below. Do you think the orientation and position of the measurement marking on a real product would be…

1. Good
2. Ok
3. Acceptable, although it would be difficult to use
4. Unacceptable and in need of Government regulations to prevent this
5. I don’t care

|  |
| --- |
| **PROGRAMMING INSTRUCTION**  E1 is asked for each of the 4 options  E1 – E4 Is then repeated for Product 2  After the second product, respondent moves on to section F |

1. Other questions

QF1. When you are shopping at the supermarket, for **each product** you consider buying, how often do you look at…

1. Information on the product labels or packages?
2. Information on shelves (not on the product itself, e.g. price, promotions, unit pricing, etc)?

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| 1 | 2 | 3 | 4 | 5 | 6 | 99 |
| For every product | For most products | For some products | Rarely | Only the first time I buy something | Never | Unsure |

*Ask for responses 1-5 in QF1:*

QF2. How much attention do you pay to…

1. Information on product labels or packages?
2. Information on shelves (not the product itself, e.g. price, promotions, unit pricing, etc)?

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| 1 | 2 | 3 | 4 | 5 | 6 | 99 |
| Very high amount of attention | High amount of attention | Medium amount of attention | Low amount of attention | Very low amount of attention | No attention | Unsure |

*For responses 1-5 in QF1:*

QF3. When you are buying products such as those below, which information do you generally look for? *Please select as many as apply*

|  |
| --- |
| **PROGRAMMING INSTRUCTION**  Show only the two products evaluated in sections C, D and E |

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| --- | --- | --- | --- | --- | --- | --- | --- |
|  | *RANDOMISE* | Sauces, e.g. tomato sauce | Savoury snack foods, e.g. Potato chips | Dairy foods, e.g. Cheese | Sunscreen | Distilled spirits, e.g. gin | Insect spray |
|  | **On a product label / package** [SHOW ONLY IF QF1a = 1-5] | | | | | | |
| A | Brand |  |  |  |  |  |  |
| B | A nutrition claim on the front of pack (e.g. reduced fat) |  |  |  |  |  |  |
| C | Country of Origin |  |  |  |  |  |  |
| D | Nutrition information panel (e.g. table on back of packs) |  |  |  |  |  |  |
| E | Number of servings |  |  |  |  |  |  |
| F | Advisory / warning statement |  |  |  |  |  |  |
| G | Weight / volume marking (measurement marking) |  |  |  |  |  |  |
| H | Endorsement, e.g. Heart Foundation Logo, RSPCA endorsement |  |  |  |  |  |  |
| I | Energy / calories / kilojoules |  |  |  |  |  |  |
| J | Ingredients list |  |  |  |  |  |  |
| K | Allergen information |  |  |  |  |  |  |
| L | Natural / organic claims |  |  |  |  |  |  |
| M | Vegetarian information |  |  |  |  |  |  |
| N | Preservatives / additives |  |  |  |  |  |  |
| O | Other information on product packs / labels, please specify: |  |  |  |  |  |  |
| P | None |  |  |  |  |  |  |
|  | **On the shelf** [SHOW ONLY IF QF1b = 1-5] | | | | | | |
| Q | Product promotions (e.g. 20% off, 2 for 1) |  |  |  |  |  |  |
| R | Price of product |  |  |  |  |  |  |
| S | Unit pricing, i.e. cost per 100g / kg |  |  |  |  |  |  |
| T | The size (weight or volume) of the product |  |  |  |  |  |  |
| U | Other shelf information, please specify: |  |  |  |  |  |  |
| V | None |  |  |  |  |  |  |

*If yes to unit pricing above [QF3w = YES]*

**Unit pricing** shows the price of the product in terms of a set weight/volume e.g. $ per 100ml or $ per kg

QF4. How useful do you generally find unit pricing is to determine value for money when choosing between product options?

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| Not at all useful |  |  |  |  |  |  |  |  |  | Very useful |

*If yes to measurement marking above [QF3i = YES]:*

QF5. How useful do you generally find the measurement marking (e.g. weight, volume) is to determine value for money when choosing between product options?

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| Not at all useful |  |  |  |  |  |  |  |  |  | Very useful |

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| Part 4, Division 4.4, Subdivision 1 of the *National Trade Measurement Regulations 2009* currentlyrequires a pre-packaged product to be marked with a statement of measurement (ie: a product’s weight or volume) that is clear, and readily seen. This **measurement marking** must be on the primary display panel, which typically means the front of the package. The marking must be close to any name or brand of the product and be read in the same direction. It must be at least 2mm from the limits of the package and from any other graphic matter. |

For the next three questions, please think about packaged products you buy from the supermarket that have measurement markings of their volume or weight:

QF6. Do you agree or disagree that Government regulation **is** needed for the orientation and position of the measurement mark?

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| 1 | 2 | 3 | 4 | 5 | 99 |
| Strongly agree | Agree | Neither agree nor disagree | Disagree | Strongly disagree | Unsure |

QF7. How important is it to you…

1. …for the measurement marking location to remain on the front of products?
2. …for the font size of the measurement marking to remain at least 2mm high?
3. …for the direction of the measurement marking to remain horizontal?

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| Not at all important |  |  |  |  |  |  |  |  |  | Very important |

QF8. If the measurement marking was not on the front of the pack, what, if any, concerns would you have? OE

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1. Demographics

QG1. Which of the following best describes your HOUSEHOLD? **SR**

1. Single or couple (under 30), no children
2. Single or couple (over 30) no children
3. Family, with youngest child under 6
4. Family, with youngest child under 13
5. Family, with teenage or older children at home
6. Mature couple or single, no children at home
7. Prefer not to answer

QG2. Are you the person **most** responsible for the household grocery shopping?

1. Yes
2. Yes – equally with at least one other person
3. No
4. Unsure

QG2. Which of the following best describes what you do? S **SR**

1. Work full time
2. Work part time
3. Home duties SKIP TO G4
4. Unemployed/looking for work SKIP TO G4
5. Retired SKIP TO G4
6. Student SKIP TO G4
7. Not working because of work related injury SKIP TO G4
8. Other (SPECIFY) SKIP TO G4
9. Prefer not to answer SKIP TO G4

QG3. In what sort of setting do you work? SR

1. Office
2. Retail / Shop
3. Factory / Workshop
4. Education and training
5. Outdoors
6. Mobile
7. Other, specify
8. Prefer not to answer

QG4. Approximately, what is your HOUSEHOLD income per year, before tax? **SR**

1. Less than $30,000
2. $30,000-$50,000
3. $50,001-$100,000
4. $100,001-$150,000
5. More than $150,000

98. Prefer not to answer

1. Don’t know / unsure

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| **PROGRAMMING INSTRUCTION**  End of survey  Thanks and close  Insert standard messaging |

1. Estimated Resident Population [↑](#footnote-ref-1)
2. Demographic quotas were set, based on the most recent Estimated Resident Population statistics (collected by the Australian Bureau of Statistics (ABS)), to ensure the sample was demographically representative of the general population. [↑](#footnote-ref-2)
3. http://www.codexalimentarius.net/gsfaonline/foods/index.html?expand=223 [↑](#footnote-ref-3)
4. Wine is excluded from consideration as it is exempt from this legislation [↑](#footnote-ref-4)
5. If a nail polish container holds a quantity less than 15 g or 15 mL then it is exempt from this legislation. However, if the nail polish container is marked with the measurement, the marking must comply with the regulation [↑](#footnote-ref-5)