

# Report on the monitoring of the implementation of the Health Star Rating system: Key findings for Area of Enquiry 2 – Consumer awareness and ability to use the Health Star Rating system correctly – November 2017

**Prepared for the Commonwealth Department of Health**

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# Executive summary

## Context and background

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

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

The monitoring is broken into three areas of enquiry:

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

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

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

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

This report presents the most recent findings from a consumer awareness survey, undertaken during August, September, October and November 2017.

## Key findings

### Awareness of the HSR system

Awareness of the HSR system has grown substantially since it was implemented in 2014. While unprompted, awareness of the HSR system is still behind the Heart Foundation Tick, it has overtaken 'Australian Made' since July 2017 to be the second most frequently identified food logo, with 23 percent of respondents recalling the HSR system.

Prompted, the HSR logo is the most well recognised, with 82 percent of respondents aware of the HSR system. This is a significant increase since September 2015, when just 53 percent of respondents were aware of the HSR system.

Young, female, and those in a healthy weight range are more likely to be aware of the HSR system than those older, male or overweight/obese respondents.

### Interpreting the HSR system

The majority of people correctly understand that the HSR system is a rating or guide to the healthiness of a product (58 percent), and helps consumers to identify healthier food options within the same food category (74 percent). Consumers also understand that the more stars a product has, the healthier it is, relative to other food items.

However, some respondents believe the HSR can be used across food categories. This indicates that while consumers have a good general understanding of how to interpret the HSR, they don't such a strong grasp on the nuances of the system.

### *Pre-packaged foods*

In this survey, additional questions were included to explore how consumers use and interpret the HSR system in relation to pre-packaged foods. This was identified as an important area to explore, because some pre-packaged products' rating is based on the prepared food item.

The majority of respondents were not aware that the HSR rating on some pre-packaged foods is based on preparation in accordance with instructions (39 percent), but the majority of respondents follow instructions when preparing pre-packaged food items (74 percent).

By product type, the proportion of respondents that follow instructions when preparing pre-packaged foods varies substantially (e.g. eight percent for cookie and biscuit mixes to 56 percent for cake and pancake mixes). This indicates that the appropriateness of rating products on the 'prepared as' instructions may vary by type of product.

## HSR and purchasing behaviour

Sixty-eight percent of respondents have bought a HSR product in the last 3 months, with 45 percent saying they always or most of the time include a HSR product in their shopping basket.

Younger persons, males, and those in a healthy weight range are more likely to have purchased a HSR product.

When shopping, 65 percent of respondents reported being influenced by the HSR system in their purchasing decision, which is consistent with the previous two surveys (March and July 2017). Of the people influenced, 39 percent were influenced to buy a product with more stars.

Interestingly there has been a decrease in the proportion of respondents that believe the HSR will influence their future purchasing decision: in September 2015 72 percent of respondents stated they would be influenced by HSR in future purchases, which has fallen to 53 percent.

## Awareness and influence of HSR advertising

Only 17 percent of respondents recall hearing, seeing or reading any advertising or promotion of the HSR system, which is a small, but statistically significant decrease since July 2017.

But for those that do recall HSR advertising, 69 percent were influenced to buy a product that they wouldn't normally.

This indicates that advertising is powerful when it reaches a consumer.

## Attitudes and perceptions of the HSR system

The majority of respondents have a positive view of the HSR system, with 58 percent of respondents agreeing that the system is trustworthy, credible (60 percent), reliable (59 percent) and open and transparent (54 percent).

Overall, the majority of respondents believe the system is easy to use (75 percent), understand (73 percent), and makes choosing food easier (63 percent).

Almost two-thirds of respondents reported that their confidence in the system is high, or somewhat high (65 percent). For those respondents with low levels of confidence in the system,<sup>1</sup> they were asked to explain why. The most common responses were that the system is not accurate or reliable (33 percent), misleading (26 percent) and that the star rating can be bought (17 percent).

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<sup>1</sup> Includes respondents with 'low' or 'somewhat low' confidence in the HSR system.