Media Analysis Report

July 2014 – June 2016

SA Health – Health Star Rating

isentia.insights

Contents

Introduction

This document presents the results of analysis of media coverage of the Health Star Rating (HSR) system between 1 July 2014 and 30 June 2016.

- The information in the report is presented in eight quarterly periods, from Quarter 3 2014 to Quarter 2 2016 inclusive.

- The report integrates previous research which analysed press and broadcast reporting during 2014 and 2015, and includes Australian online coverage from 1 July 2014.

- The scope of press coverage was limited to national, capital city daily, and selected rural newspapers, and relevant magazines.

- With the exception of the first analysis period when it was capped at 60 reports, broadcast coverage included all relevant Australian radio and television reports, excluding syndications.

- Internet coverage was limited to Australian sites, with the exclusion of the online editions of regional and suburban newspapers. A 50% cap using random sampling was applied to this content.

- There were slight modifications to the research matrix for the period 1 July 2015 to 30 June 2016, with the most significant being the inclusion of the food retail industry as a stakeholder.

Media analysis reports by Isentia use the CARMA® methodology – for more information, see the end of the report.

Executive Summary

Key Findings

The Health Star Rating (HSR) system remained a significant topic of reporting on public health policy over the whole of the analysis period.

The favourability of coverage was highest in late 2014, when then-Assistant Health Minister Fiona Nash and the Public Health Association's Michael Moore each promoted the relaunch of the HSR website. This followed frequent criticisms of the federal government, after the site was hurriedly pulled offline earlier that year.

However, in the first half of 2016 the HSR system again became the focus of criticism. Coverage over this period frequently cited spokespeople from CHOICE and the Obesity Policy Coalition, with each arguing that the food industry was "gaming the system" by choosing some products but not others to be rated. These reports contributed significantly to the leading unfavourable message overall, that *HSR allows the food industry to game the system*.

Notably, the three leading favourable messages were conveyed most frequently by the food industry. These were that HSR *helps promote food products*, that it *drives innovation and product reformulation*, and that *the industry is acting to introduce the system*.

Coverage Highlights

There were several important periods in coverage of Health Star Ratings, with the relaunch of the HSR website in December 2014 a notable instance.

The move by Kellogg's to begin including HSR labels on its cereal products was frequently covered during April 2015. In July 2015, the federal government announced $2.1 million in spending to promote the HSR system, with the Heart Foundation appointed to monitor its uptake. Then, in December 2015 it was reported that the National Heart Foundation would retire its tick logo and adopt the HSR system.

The system was again promoted during February 2016, when reports citing Michael Moore from the Public Health Association highlighted its continued uptake. However, criticisms of the system were also reported at that time, with CHOICE's Tom Godfrey accusing food manufacturers of gaming the system, and a report commissioned by NSW Health comparing the HSR Rating unfavourably with the state's existing traffic light classifications.

In March 2016 the HSR system again became the focus of reports, with the Obesity Policy Coalition calling on snack bar manufacturers to display the Rating on their products.

Stakeholders

Food Manufacturing Industry

Because different stakeholder groups were often discussed together, there were strong similarities in the breakdown of reporting on each. Typifying this were food manufacturing industry stakeholders and consumers or consumer advocates, with each cited or prominently discussed in the same number of analysed reports (520, or half of the total analysed coverage.

There was significant disparity in the tone of radio and television coverage of the food manufacturing industry, and this shifted over time. Television news reports in Quarter 2 2015 were frequently favourable, with many noting Kellogg's decision to adopt the HSR system. The increasing uptake of the system was also highlighted in television reports in the first half of 2016, and as a result, the tone of television coverage was relatively high (58.0 average rating).

By contrast, calls by the Obesity Policy Coalition for confectionary makers to display Health Star Rating on their products were frequently covered in radio news reports and interviews during the second quarter of 2016. These reports were largely neutral or unfavourable in tone, with a significantly lower average rating of 52.9.

As noted, the food manufacturing industry was the most frequently cited stakeholder in reports conveying the three leading favourable messages.

Consumers or Consumer Advocates

A total of 520 analysed reports discussed consumers or their advocates. While they were mentioned second most frequently in press and broadcast coverage, consumers were the leading stakeholder in online coverage. Contributing significantly to this were unfavourable reports from the *I Quit Sugar* website, which were critical of the HSR methodology and frequently conveyed the unfavourable message that *HSR allows industry to game this system* (chart 10).

While this was the leading consumer message, and was largely conveyed in the first quarter of 2016, the second leading message was that *labels communicate effectively with consumers*, which was mostly conveyed in the second quarter of 2015, when CHOICE used the HSR system to highlight misleading health claims on some processed food products. CHOICE's Tom Godfrey was also the second most frequently cited spokesperson overall (73 reports).

Public Health/Medical

Public health and medical experts were the third most prominently discussed stakeholder group (394 reports, or 38.0% of overall coverage). While these stakeholders were often critical of Health Star Rating, they frequently called for the *system to become*

mandatory. With 60 reports, this was the leading favourable message conveyed by this group.

A range of other favourable messages were also communicated by public health and medical stakeholders, including that *Health Star Rating will drive changes in consumer behaviour*, that *labels communicate effectively with consumers*, and that *HSR is superior to other systems.*

Notably, the unfavourable message that the *HSR allows industry to game the system* was also often conveyed by this group, most frequently in the second quarter of 2016. Many of these reports cited Jane Martin from the Obesity Policy Coalition, who called on snack bar manufacturers to display Health Star Rating on their products. Martin was the most frequently cited spokesperson overall (74 reports).

Government or Bureaucracy

Governments at a state or federal level were prominently discussed in a total of 384 reports, or 37.0% of total coverage.

Government support for the HSR system was the most frequently conveyed message in this coverage, and was communicated most often in the fourth quarter of 2014, when the HSR website was relaunched. Reports at the time also conveyed the favourable messages that the *HSR system will drive changes in consumer behaviour* and that *labels communicate effectively with consumers*, which were the second and third leading government messages overall.

With the exception of Quarter 4 2014, while government policy was a frequent subject of debate, its representatives rarely participated. Former Assistant Health Minister and Minister for Rural Health Fiona Nash was the most frequently cited government spokesperson (37 analysed reports), while unnamed federal health department representatives were cited in 10 reports. Nash promoted the HSR system in proactively generated reports on the website's relaunch in December 2014, and occasionally

commented on the government's position that it would not introduce a sugar tax or junk food tax, despite repeated calls by other stakeholders for them to be considered.

Food Retail Industry

The food retail industry, including the Coles and Woolworths supermarket chains, was mentioned prominently in 125 reports, or 12.0% of analysed coverage.

A significant proportion of favourable reports promoted the sale of products with Health Star Rating, including Woolworths and Coles "home brand" ready-made meals.

Food retailers were also discussed in unfavourable reports in which the health claims of specific products were criticised by consumer advocates and medical experts.

The availability of products at supermarkets was noted in wider coverage of the HSR system, including reports on its two-year review in the second quarter of 2016, which highlighted its continued adoption. These reports conveyed the favourable message that *Health Star Rating help promote food products*, which was the leading food retail industry message.

Primary Producers

Primary producers were discussed less prominently than most other stakeholders, in 37 reports or 3.5% of total coverage.

They were mentioned most frequently during the third quarter of 2014, when AusVeg complained that vegetables such as celery, lettuce, and pumpkin failed to meet the criteria for a five-star rating, despite their widely verified health benefits.

These criticisms were repeated in the first quarter of 2015, when a series of reports cited Rob McGavin from Cobram Estate and Boundary Bend. McGavin argued that the HSR system misled olive oil consumers because it did not recognise the presence

of antioxidants and the absence of trans-fats in the product. As a result of these criticisms, the two most frequently conveyed primary producer messages were that *fresh or unprocessed foods and juices do not rate highly* and that *the HSR Rating are misleading*. These were conveyed in eight reports each.

Other Stakeholders

Most other stakeholders were broadcast commentators who mentioned the HSR system incidentally. As a result, this group had little influence over the debate on the HSR's implementation.

Table 1

This table shows the key metrics for the period of analysis.

Key Metrics		
Total Volume	Overall	1,040
	Press	450
	Broadcast	178
	Internet	412
Average Favourability	Overall	54.8
	Press	55.0
	Broadcast	54.4
	Internet	54.9
Leading Stakeholders (Mentions)	Consumers/consumer advocates; Food manufacturing industry (520 each)	
Leading Message (Mentions)	Food industry is acting to introduce HSR (143)	
Leading Spokesperson (Mentions)	Jane Martin, Obesity Policy Coalition (74)	
Leading Bylines/Comperes (Reports)	Esther Han (12)	
Leading Media (Reports)	ausfoodnews.com.au (77)	

Trend Analysis

Chart 1 Trend: all media

Stakeholders

Chart 2 Stakeholders: overall

	FOOD MANUFACTURING INDUSTRY	CONSUMERS / CONSUMER ADVOCATES	PUBLIC HEALTH / MEDICAL	GOVERNMENT / BUREAUCRACY	FOOD RETAIL INDUSTRY	PRIMARY PRODUCERS	OTHER
Total	520	520	394	384	125	37	7
FAV	309	318	245	209	57		
NEU	175	133	118	132			
UNFAV		69					
AVG FAV	55.9	54.8	56.4	54.8	54.3	51.6	54.3

Chart 3 Stakeholders: press

	FOOD MANUFACTURING INDUSTRY	CONSUMERS / CONSUMER ADVOCATES	PUBLIC HEALTH / MEDICAL	GOVERNMENT / BUREAUCRACY	FOOD RETAIL INDUSTRY	PRIMARY PRODUCERS	OTHER
Total	221	188	154	136	45	24	1
FAV	134	135	102	80			
NEU	76		45	37			
AVG FAV	55.9	55.1	56.7	54.4	56.4	58.1	70.0

Chart 4 Stakeholders: radio

Stacked bar chart with VOLUME (left axis, 0–200) and FAVOURABILITY (right axis, 40–60). Legend: FAV, NEU, UNFAV, AVG FAV.

Stakeholder	FAV	NEU	Total	AVG FAV
PUBLIC HEALTH / MEDICAL	35	32	72	54.0
CONSUMERS / CONSUMER ADVOCATES	22	37	65	52.8
FOOD MANUFACTURING INDUSTRY	16	27	45	52.9
GOVERNMENT / BUREAUCRACY	27		38	52.0
FOOD RETAIL INDUSTRY			11	49.5
OTHER			6	51.7

Chart 5 Stakeholders: television

Stacked bar chart with VOLUME (left axis, 0–80) and FAVOURABILITY (right axis, 30–70). Legend: FAV, NEU, UNFAV, AVG FAV.

Stakeholder	FAV	NEU	Total	AVG FAV
PUBLIC HEALTH / MEDICAL	20	17	38	58.3
CONSUMERS / CONSUMER ADVOCATES	16	20	36	56.1
FOOD MANUFACTURING INDUSTRY	17	13	30	58.0
FOOD RETAIL INDUSTRY		11	14	55.4
GOVERNMENT / BUREAUCRACY		10	14	53.2

Chart 6 Stakeholders: internet

Chart showing Volume (left axis, 0–600) and Favourability (right axis, 20–80) by stakeholder group.

Stakeholder	FAV	NEU	UNFAV	Total	AVG FAV
CONSUMERS / CONSUMER ADVOCATES	145	49	37	231	54.8
FOOD MANUFACTURING INDUSTRY	142	59		224	56.1
GOVERNMENT / BUREAUCRACY	116	58		196	55.7
PUBLIC HEALTH / MEDICAL	88			130	56.8
FOOD RETAIL INDUSTRY	31			55	53.3
PRIMARY PRODUCERS				13	39.6

Legend: FAV (green), NEU (blue), UNFAV (red), AVG FAV (line)

Leading Messages by Stakeholders

Overall

Chart 7 Favourable messages by stakeholders

Chart 8 Unfavourable messages by stakeholders

VOLUME

Message	Value
HSR ALLOWS INDUSTRY TO GAME THE SYSTEM	24, 29, 1, 1
RATINGS ARE MISLEADING	13, 6, 11, 2, 1
RATINGS DO NOT PROVIDE FAIR / REALISTIC COMPARISONS	12, 3, 1, 1, 1
FRESH / UNPROCESSED FOODS / JUICES DO NOT RATE HIGHLY	1, 1, 13, 1
RATINGS ARE NOT TRUSTWORTHY / CREDIBLE	4, 8
HSR IS NOT ACCURATE	4, 6, 1
FOOD INDUSTRY IS NOT ACTING TO INTRODUCE HSR	7, 3
HSR ENCOURAGES THE PURCHASE / CONSUMPTION OF PROCESSED FOODS	5, 4, 1
LABELS DO NOT COMMUNICATE EFFECTIVELY WITH CONSUMERS	5, 3
HSR DOES NOT REVEAL UNHEALTHY FOODS	5, 2
HSR CONFLICTS WITH EXISTING LABELLING SCHEMES	2, 2, 2
HSR DOES NOT HAVE GOVERNMENT SUPPORT	3, 1, 2
HSR DOES NOT HAVE INDUSTRY SUPPORT	5, 1
HSR IS NOT EFFECTIVE PUBLIC HEALTH STRATEGY	4, 2
CONSUMERS DO NOT RELY ON / IGNORE HSR SYSTEM	1, 3, 1
HSR DRIVES NEGATIVE REFORMULATION OF FOOD PRODUCTS	2, 3

- PUBLIC HEALTH / MEDICAL
- CONSUMERS / CONSUMER ADVOCATES
- PRIMARY PRODUCERS
- FOOD MANUFACTURING INDUSTRY
- OTHER
- GOVERNMENT / BUREAUCRACY

Public Health/Medical

Chart 9 Public health/medical messages in each time period

VOLUME

| | 0 | 16 | 32 | 48 | 64 |

FAV

- HSR SHOULD BE MANDATORY: 3 | 21 | 2 | 4 | 1 | 29
- HSR WILL DRIVE CHANGES IN CONSUMER BEHAVIOUR: 2 | 1 | 2 | 4 | 1 | 8 | 5 | 4
- LABELS COMMUNICATE EFFECTIVELY WITH CONSUMERS: 2 | 4 | 12 | 4 | 2 | 1 | 2
- HSR IS SUPERIOR TO OTHER SYSTEMS: 3 | 1 | 8 | 1 | 6 | 7
- HSR DRIVES INNOVATION / PRODUCT REFORMULATION: 4 | 10 | 1 | 9 | 1
- HSR REVEALS HEALTHY FOODS: 1 | 2 | 9 | 2 | 6 | 3
- FOOD INDUSTRY IS ACTING TO INTRODUCE HSR: 1 | 2 | 1 | 2 | 8 | 5
- HSR IS AN EFFECTIVE PUBLIC HEALTH STRATEGY: 3 | 5 | 4 | 3 | 1 | 2

UNFAV

- HSR ALLOWS INDUSTRY TO GAME THE SYSTEM: 2 | 3 | 19
- RATINGS ARE MISLEADING: 1 | 4 | 4 | 1 | 2
- RATINGS DO NOT PROVIDE FAIR / REALISTIC COMPARISONS: 1 | 1 | 5 | 3 | 1 | 1
- FOOD INDUSTRY IS NOT ACTING TO INTRODUCE HSR: 3 | 1 | 1 | 1 | 1
- HSR DOES NOT REVEAL UNHEALTHY FOODS: 1 | 2 | 2
- HSR ENCOURAGES THE PURCHASE / CONSUMPTION OF PROCESSED...: 1 | 2 | 2
- HSR DOES NOT HAVE INDUSTRY SUPPORT: 2 | 1 | 2
- LABELS DO NOT COMMUNICATE EFFECTIVELY WITH CONSUMERS: 3 | 2

Legend: Q3 14 | Q4 14 | Q1 15 | Q2 15 | Q3 15 | Q4 15 | Q1 16 | Q2 16

Consumers/Consumer Advocates

Chart 10 Consumers/consumer advocates messages in each time period

VOLUME

| | 0 | 8 | 16 | 24 | 32 |

FAV

LABELS COMMUNICATE EFFECTIVELY WITH CONSUMERS: 1, 5, 13, 2, 2, 1, 1
HSR REVEALS HEALTHY FOODS: 1, 2, 2, 9, 3, 5, 3
HSR WILL DRIVE CHANGES IN CONSUMER BEHAVIOUR: 1, 6, 6, 1, 2
HSR REVEALS UNHEALTHY FOODS: 2, 2, 10, 1, 1
HSR SHOULD BE MANDATORY: 11, 1, 3
HSR HELPS PROMOTE FOOD PRODUCTS: 2, 5, 1, 4, 1
HSR DRIVES INNOVATION / PRODUCT REFORMULATION: 2, 4, 2, 4

UNFAV

HSR ALLOWS INDUSTRY TO GAME THE SYSTEM: 2, 2, 20, 5
RATINGS ARE NOT TRUSTWORTHY / CREDIBLE: 1, 5, 2
HSR IS NOT ACCURATE: 2, 3, 1
RATINGS ARE MISLEADING: 1, 1, 3, 1
HSR ENCOURAGES THE PURCHASE / CONSUMPTION OF PROCESSED...: 1, 2, 1
LABELS DO NOT COMMUNICATE EFFECTIVELY WITH CONSUMERS: 1, 1, 1
FOOD INDUSTRY IS NOT ACTING TO INTRODUCE HSR: 1, 1, 1
HSR DRIVES NEGATIVE REFORMULATION OF FOOD PRODUCTS: 3
CONSUMERS DO NOT RELY ON / IGNORE HSR SYSTEM: 2, 1
RATINGS DO NOT PROVIDE FAIR / REALISTIC COMPARISONS: 1, 1, 1

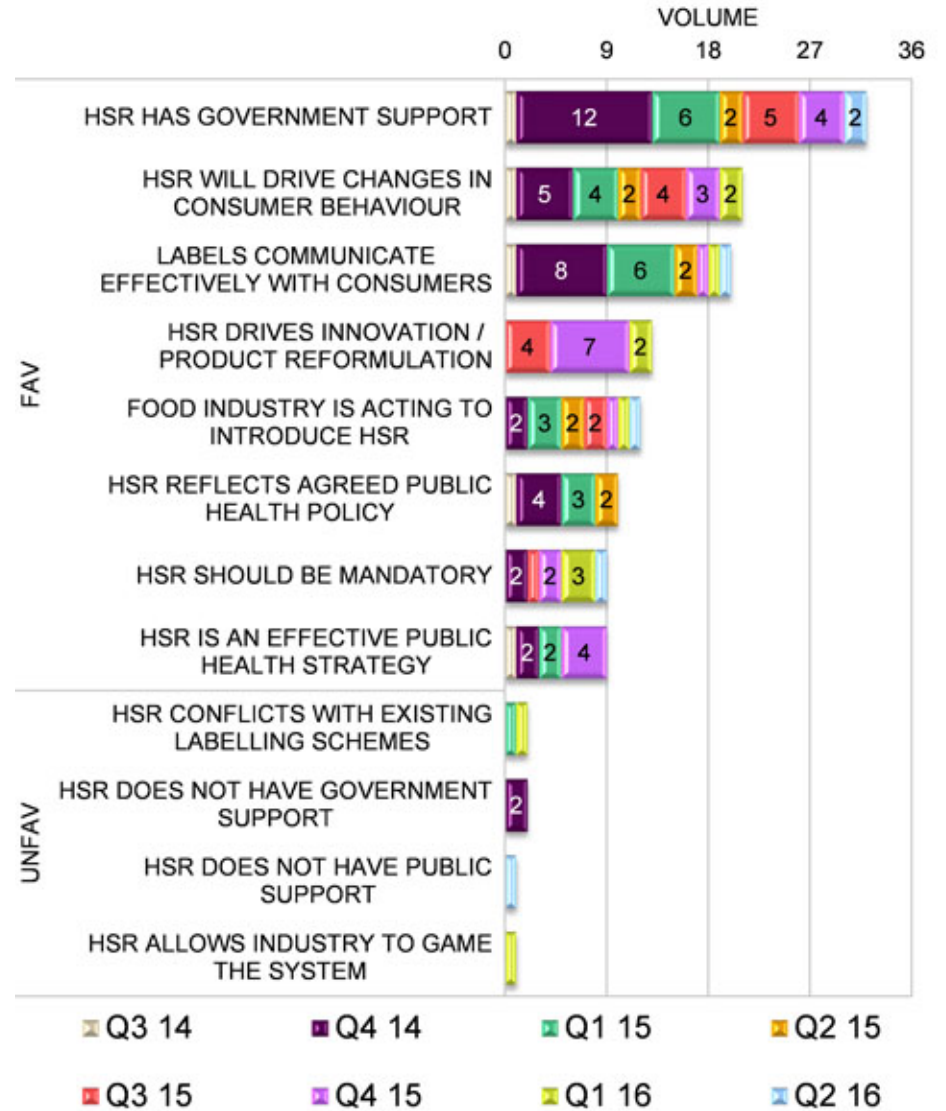Q3 14 ■ Q4 14 ■ Q1 15 ■ Q2 15 ■ Q3 15 ■ Q4 15 ■ Q1 16 ■ Q2 16

Food Manufacturing Industry

Chart 11 Food manufacturing industry messages in each time period
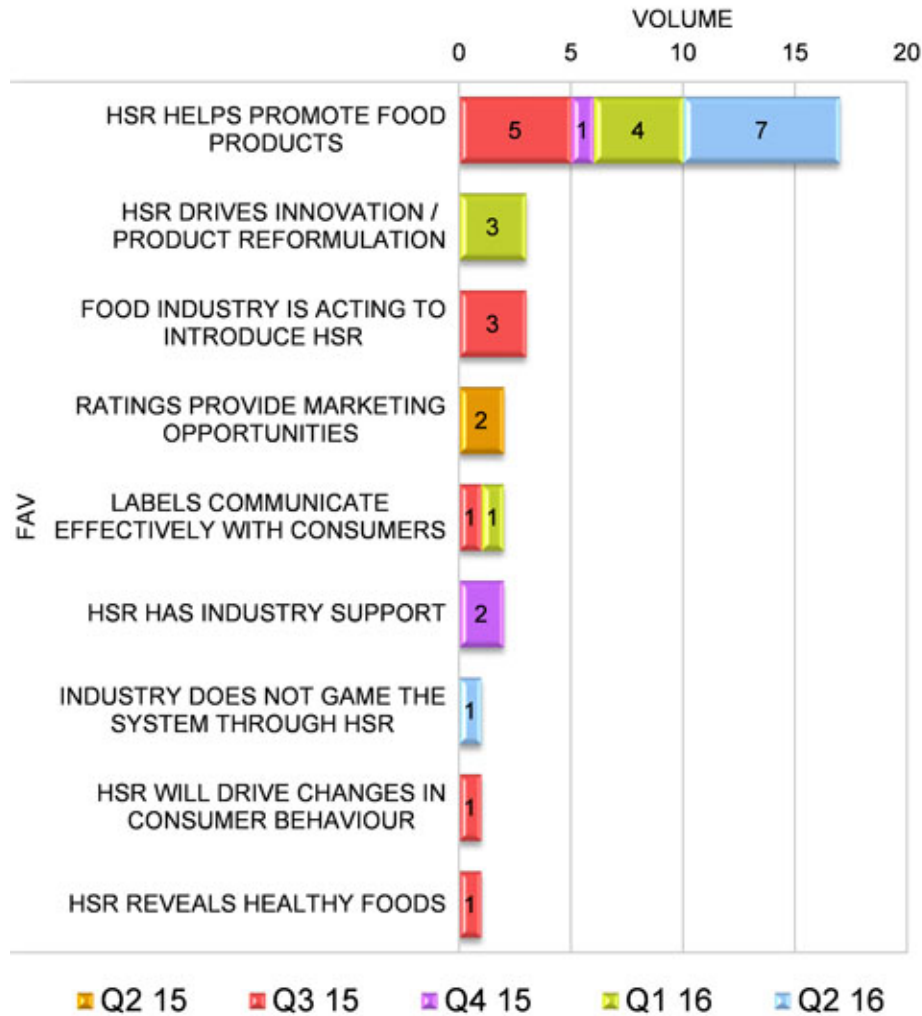

Government/Bureaucracy

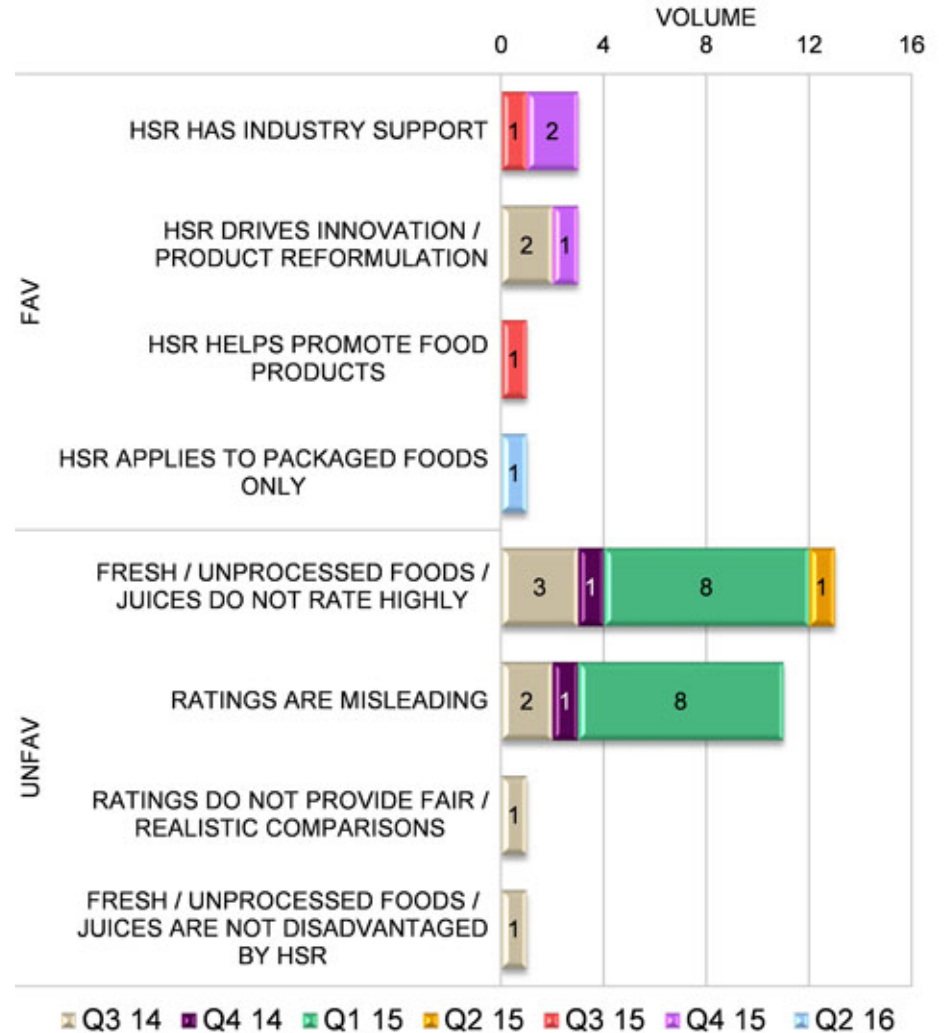**Chart 12 Government/bureaucracy messages in each time period**

Food Retail Industry

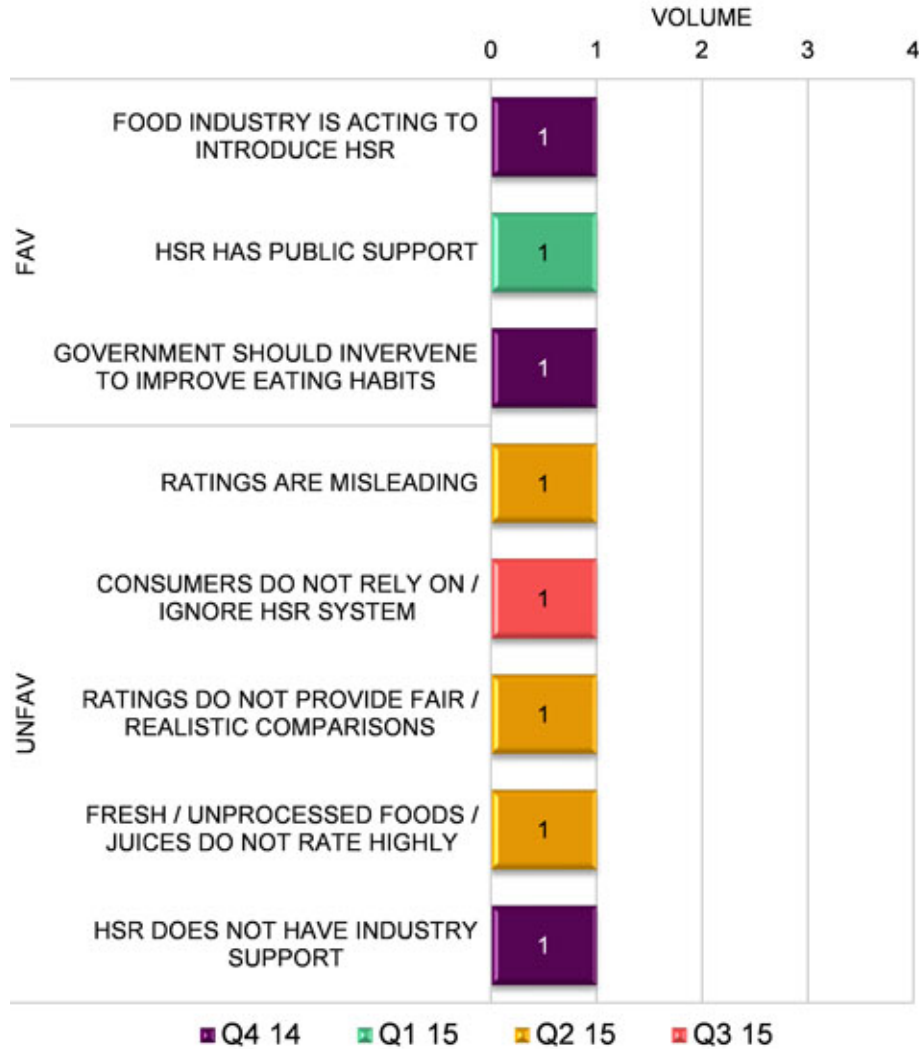**Chart 13 Food retail industry messages in each time period**

FAV	VOLUME
HSR HELPS PROMOTE FOOD PRODUCTS	5 1 4 7
HSR DRIVES INNOVATION / PRODUCT REFORMULATION	3
FOOD INDUSTRY IS ACTING TO INTRODUCE HSR	3
RATINGS PROVIDE MARKETING OPPORTUNITIES	2
LABELS COMMUNICATE EFFECTIVELY WITH CONSUMERS	1 1
HSR HAS INDUSTRY SUPPORT	2
INDUSTRY DOES NOT GAME THE SYSTEM THROUGH HSR	1
HSR WILL DRIVE CHANGES IN CONSUMER BEHAVIOUR	1
HSR REVEALS HEALTHY FOODS	1

■ Q2 15 ■ Q3 15 ■ Q4 15 ■ Q1 16 ■ Q2 16

Primary Producers

Chart 14 Primary producers messages in each time period

FAV	VOLUME
HSR HAS INDUSTRY SUPPORT	1 2
HSR DRIVES INNOVATION / PRODUCT REFORMULATION	2 1
HSR HELPS PROMOTE FOOD PRODUCTS	1
HSR APPLIES TO PACKAGED FOODS ONLY	1

UNFAV	
FRESH / UNPROCESSED FOODS / JUICES DO NOT RATE HIGHLY	3 1 8 1
RATINGS ARE MISLEADING	2 1 8
RATINGS DO NOT PROVIDE FAIR / REALISTIC COMPARISONS	1
FRESH / UNPROCESSED FOODS / JUICES ARE NOT DISADVANTAGED BY HSR	1

■ Q3 14 ■ Q4 14 ■ Q1 15 ■ Q2 15 ■ Q3 15 ■ Q4 15 ■ Q2 16

Other

Chart 15 Other messages in each time period

Legend: ■ Q4 14 ■ Q1 15 ■ Q2 15 ■ Q3 15

Leading Spokespeople

Chart 16 Leading spokespeople: overall

Chart 16 Leading spokespeople: overall

Legend: FAV COMMENT | NEU COMMENT | UNFAV COMMENT | AVG FAV
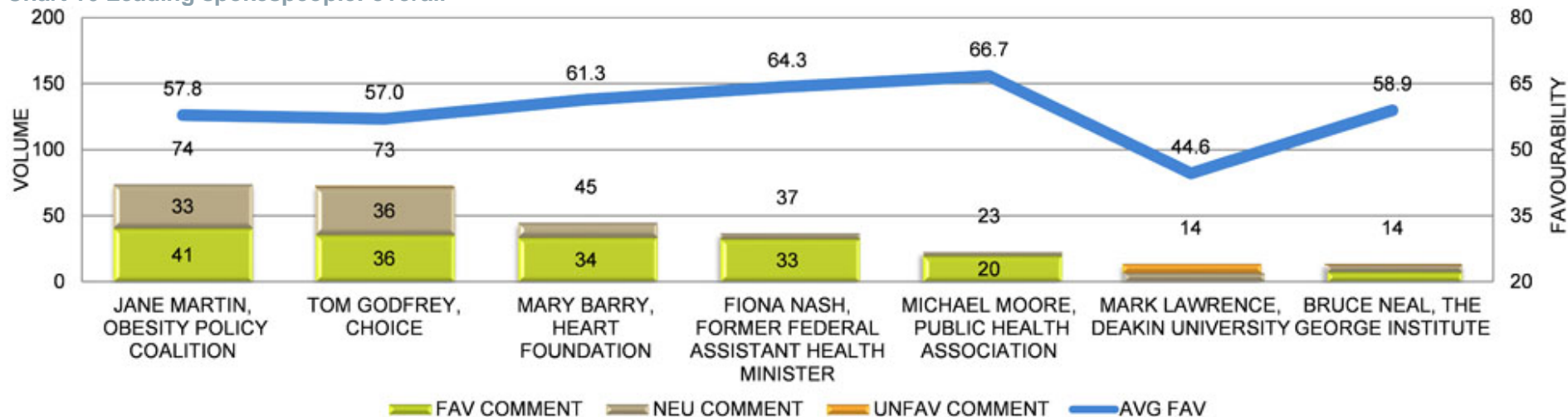
Quarterly Breakdown

Quarter 3 2014

Chart 17 Messages by stakeholders: Quarter 3 2014

Legend:
- FOOD MANUFACTURING INDUSTRY
- PUBLIC HEALTH / MEDICAL
- CONSUMERS / CONSUMER ADVOCATES
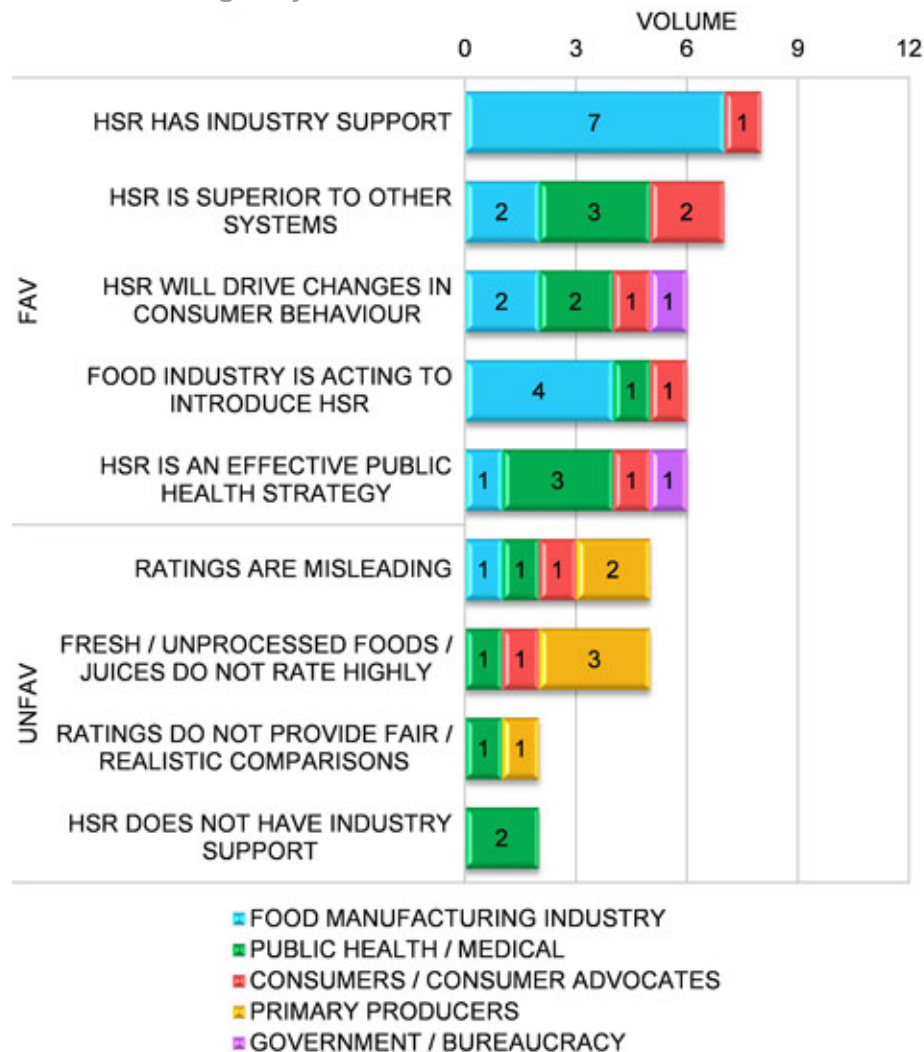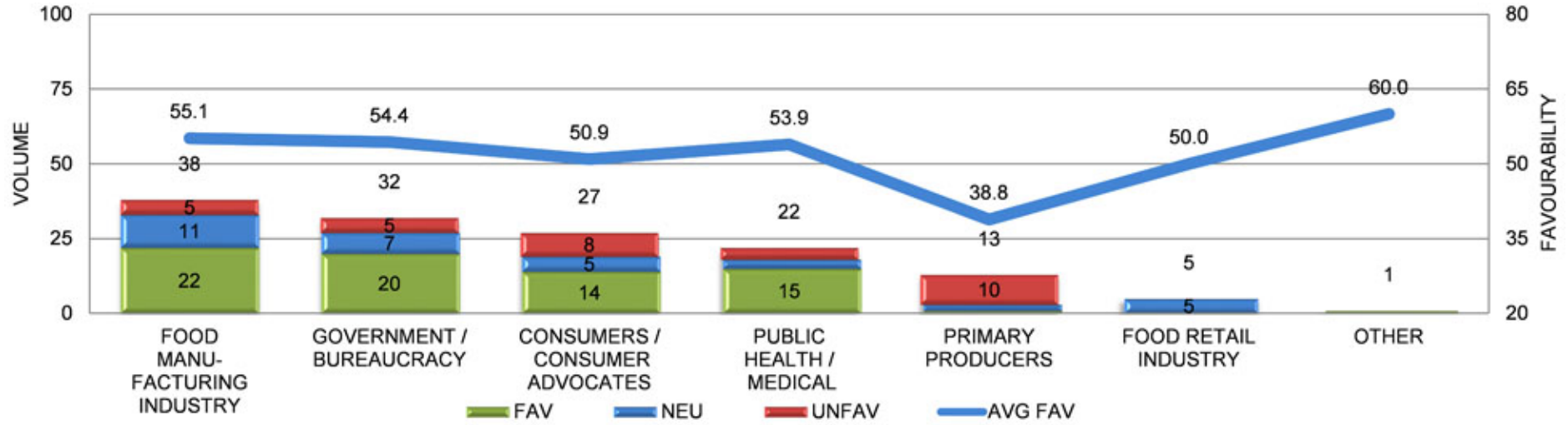- PRIMARY PRODUCERS
- GOVERNMENT / BUREAUCRACY

Table 2 Leading spokespeople: Quarter 3 2014

This table shows the most frequently cited spokespeople in Quarter 3 2014, the volume of reports in which they were cited, and the average favourability of this coverage.

Spokespeople	Vol	Avg Fav
Andrew White, Ausveg	8	31.9
Gary Dawson, Food & Grocery Council	7	60.7
Lisa Yates, Nuts for Life	3	63.3
Trevor Lauman, Monster Health Food	3	68.3
Jane Martin, Obesity Policy Coalition	3	61.7

Chart 18 Stakeholders: Quarter 3 2014

Chart shows stacked bar graph of VOLUME (left axis, 0–100) by stakeholder group with FAV (green), NEU (blue), UNFAV (red), and AVG FAV line (blue, right axis FAVOURABILITY 20–80).

Stakeholder	FAV	NEU	UNFAV	Total	AVG FAV
FOOD MANU-FACTURING INDUSTRY	22	11	5	38	55.1
GOVERNMENT / BUREAUCRACY	20	7	5	32	54.4
CONSUMERS / CONSUMER ADVOCATES	14	5	8	27	50.9
PUBLIC HEALTH / MEDICAL	15			22	53.9
PRIMARY PRODUCERS			10	13	38.8
FOOD RETAIL INDUSTRY		5		5	50.0
OTHER				1	60.0

Quarter 4 2014

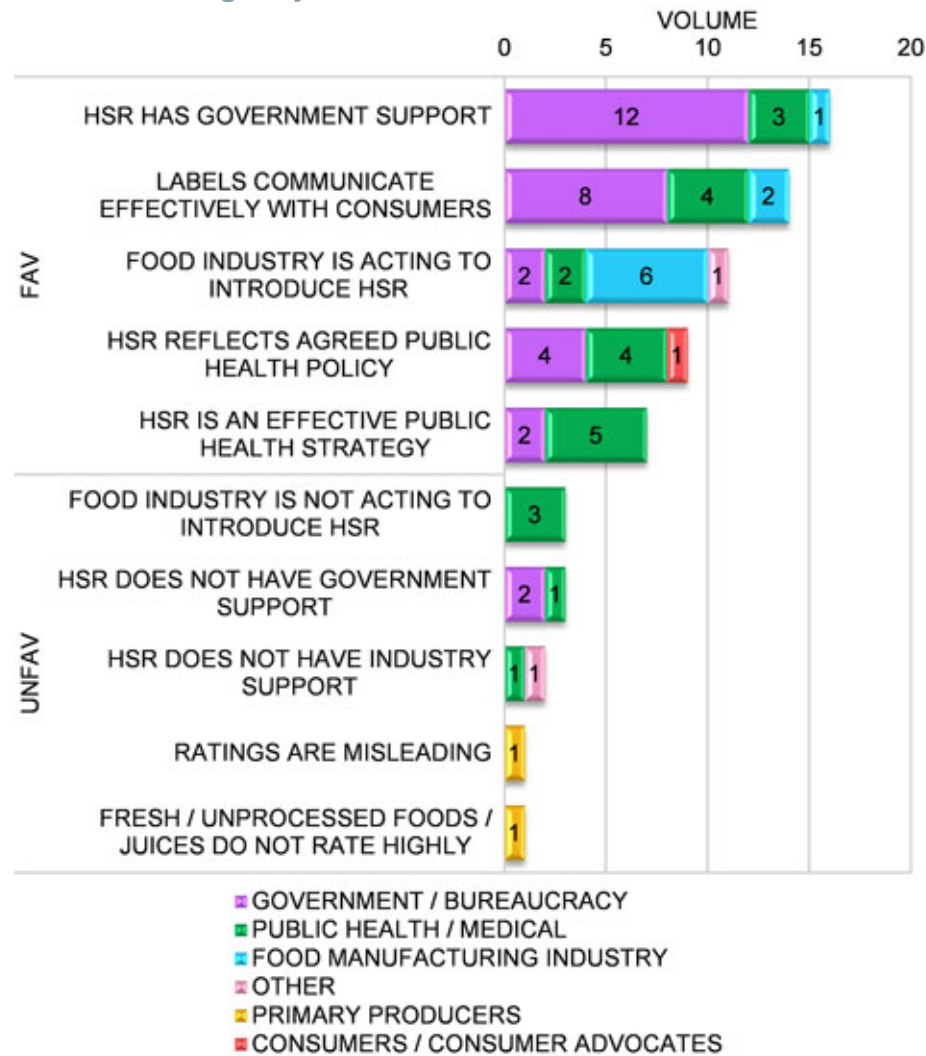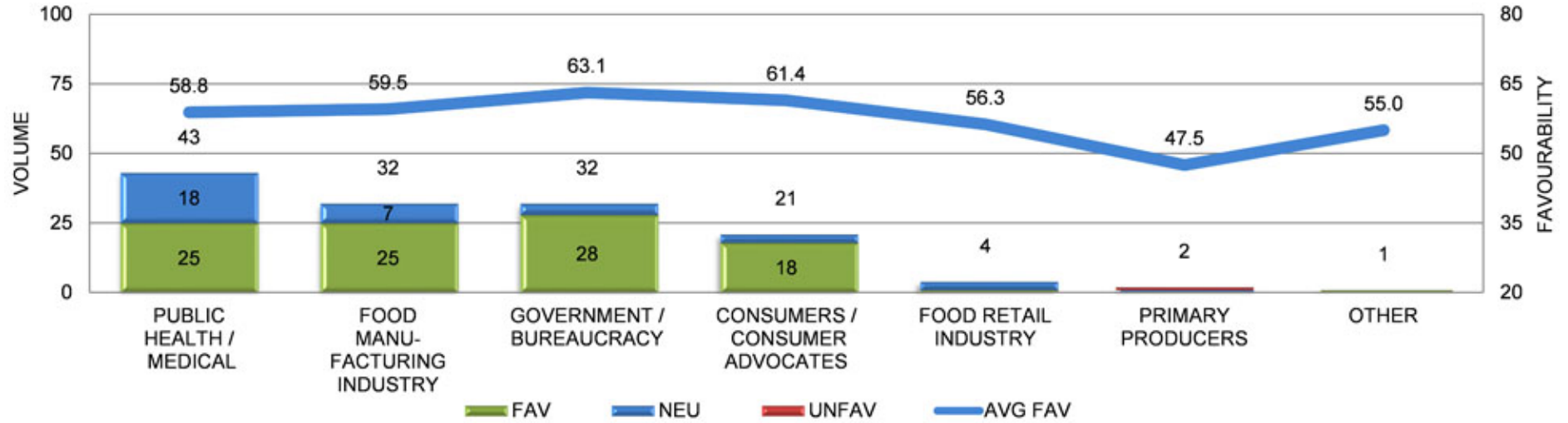**Chart 19 Messages by stakeholders: Quarter 4 2014**

Table 3 Leading spokespeople: Quarter 4 2014
This table shows the most frequently cited spokespeople in Quarter 4 2014, the volume of reports in which they were cited, and the average favourability of this coverage.

Spokespeople	Vol	Avg Fav
Fiona Nash, Former Federal Assistant Health Minister	16	65.6
Mary Barry, Heart Foundation	14	66.1
Michael Moore, Public Health Association	10	71.0
Bruce Neal, The George Institute	3	65.0
Jane Martin, Obesity Policy Coalition	3	70.0

Chart 20 Stakeholders: Quarter 4 2014

Chart showing stakeholder volume and favourability:

Stakeholder	FAV	NEU	Total Volume	AVG FAV
PUBLIC HEALTH / MEDICAL	25	18	43	58.8
FOOD MANU-FACTURING INDUSTRY	25	7	32	59.5
GOVERNMENT / BUREAUCRACY	28		32	63.1
CONSUMERS / CONSUMER ADVOCATES	18		21	61.4
FOOD RETAIL INDUSTRY			4	56.3
PRIMARY PRODUCERS			2	47.5
OTHER			1	55.0

Legend: FAV, NEU, UNFAV, AVG FAV

Quarter 1 2015

Chart 21 Messages by stakeholders: Quarter 1 2015
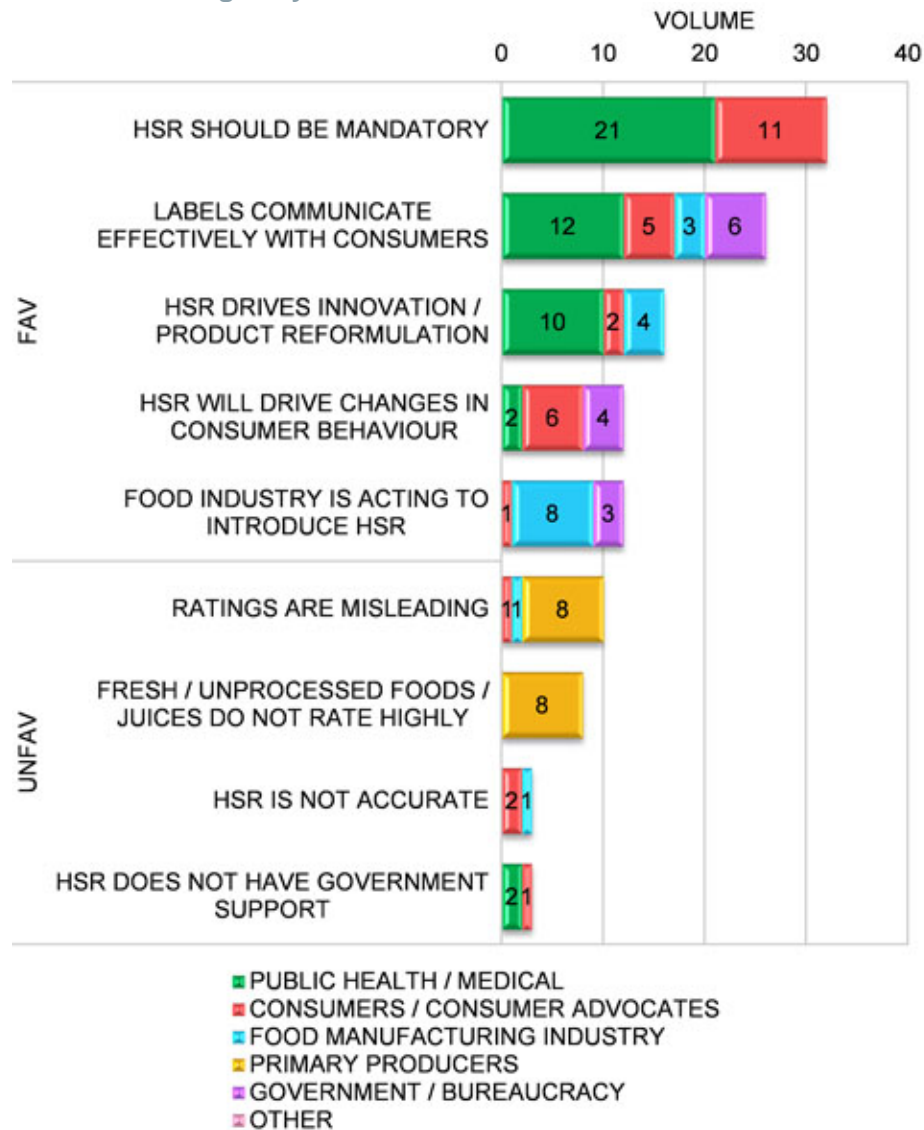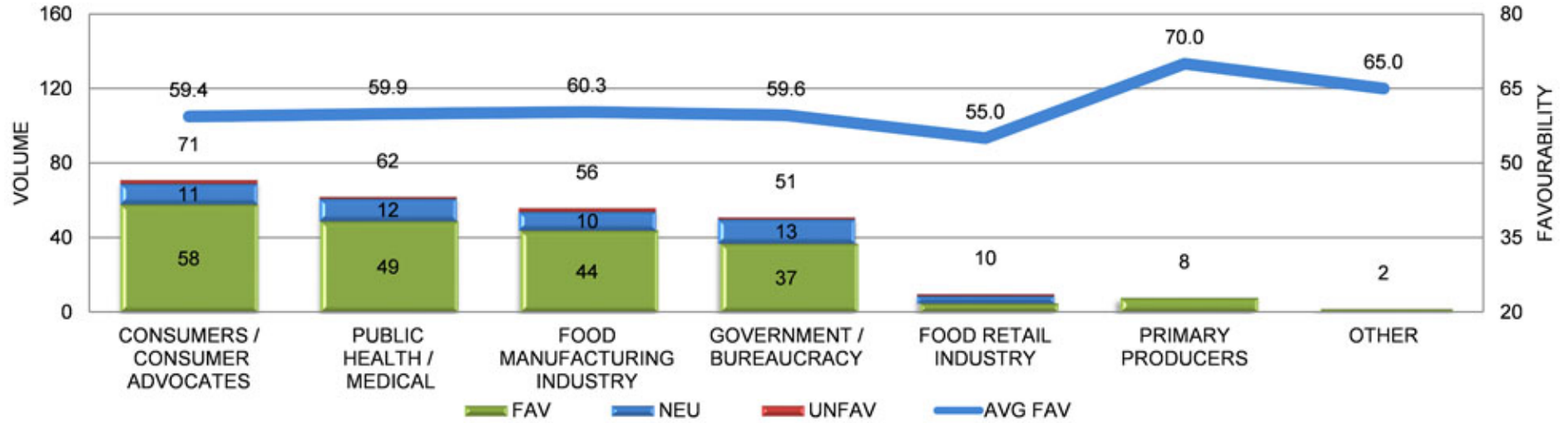

Table 4 Leading spokespeople: Quarter 1 2015

This table shows the most frequently cited spokespeople in Quarter 1 2015, the volume of reports in which they were cited, and the average favourability of this coverage.

Spokespeople	Vol	Avg Fav
Jane Martin, Obesity Policy Coalition	14	62.9
Kara Landau, Dietician	10	64.0
Tom Godfrey, CHOICE	10	58.5
Rob McGavin, Cobram Estate & Boundary Bend	9	67.8
Catherine Saxelby, Nutritionist & Food Commentator	9	67.8

Chart 22 Stakeholders: Quarter 1 2015

Chart showing VOLUME (left axis, 0–160) and FAVOURABILITY (right axis, 20–80) by stakeholder group.

Stakeholder	FAV	NEU	UNFAV	Total	AVG FAV
CONSUMERS / CONSUMER ADVOCATES	58	11		71	59.4
PUBLIC HEALTH / MEDICAL	49	12		62	59.9
FOOD MANUFACTURING INDUSTRY	44	10		56	60.3
GOVERNMENT / BUREAUCRACY	37	13		51	59.6
FOOD RETAIL INDUSTRY				10	55.0
PRIMARY PRODUCERS				8	70.0
OTHER				2	65.0

Legend: FAV, NEU, UNFAV, AVG FAV

Quarter 2 2015

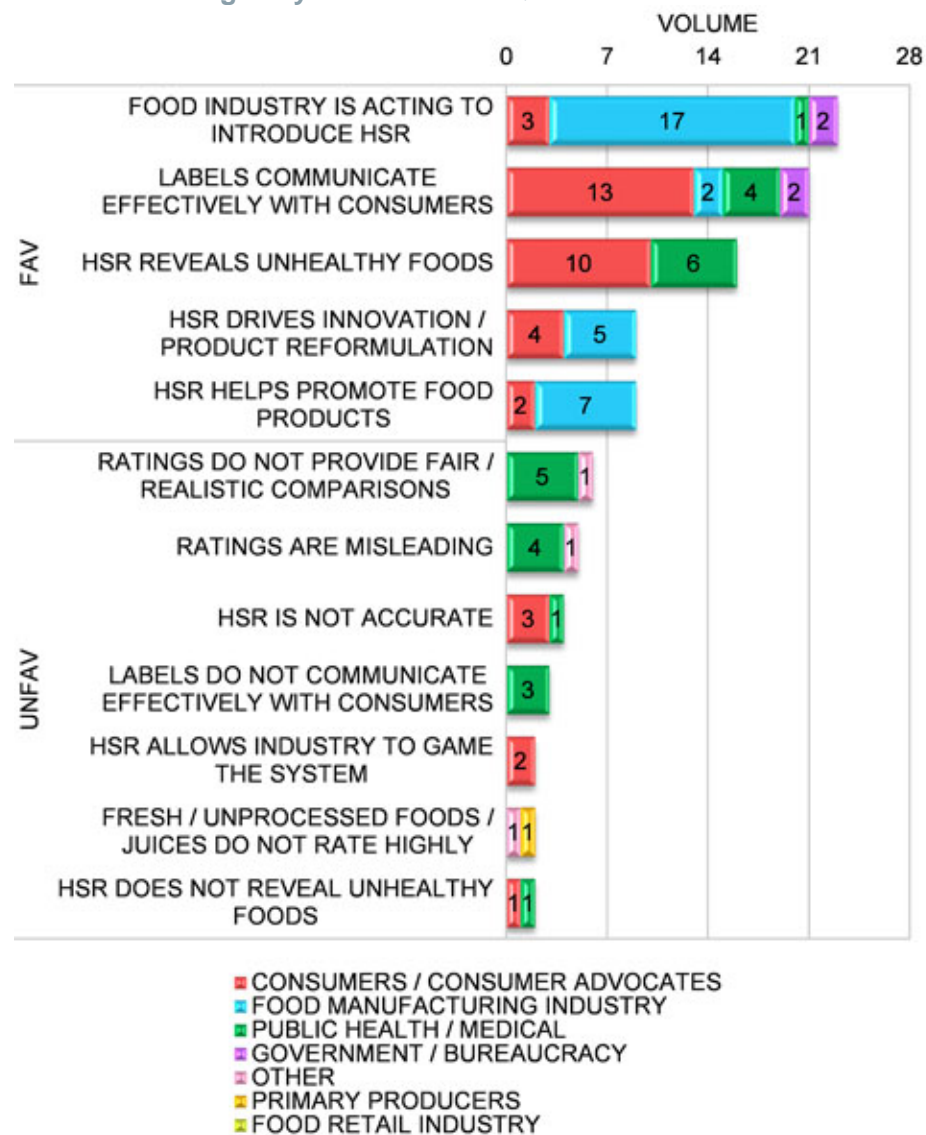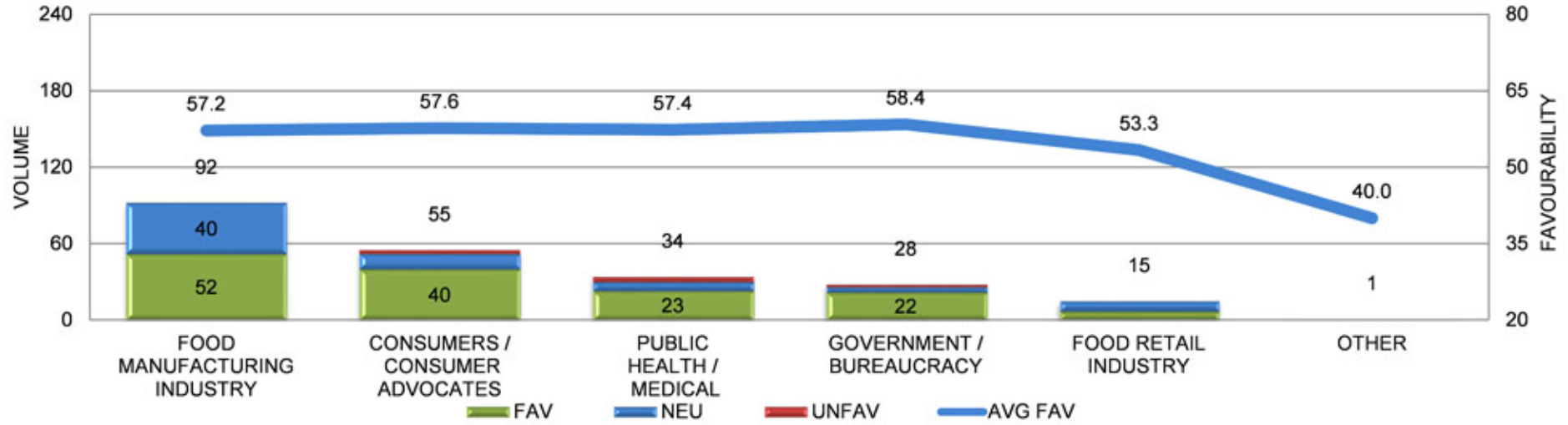Chart 23 Messages by stakeholders: Quarter 2 2015

Table 5 Leading spokespeople: Quarter 2 2015

This table shows the most frequently cited spokespeople in Quarter 2 2015, the volume of reports in which they were cited, and the average favourability of this coverage.

Spokespeople	Vol	Avg Fav
Tom Godfrey, CHOICE	24	62.5
Michelle Celander, Kellogg's Dietician	11	69.5
Jane Martin, Obesity Policy Coalition	7	67.1
Joanna McMillan, Nutritionist	4	60.0
Steph Wearne, Nutritionist	4	46.3
Fiona Nash, Former Federal Assistant Health Minister	4	65.0
Bruce Neal, The George Institute	4	48.8

Chart 24 Stakeholders: Quarter 2 2015

Quarter 3 2015

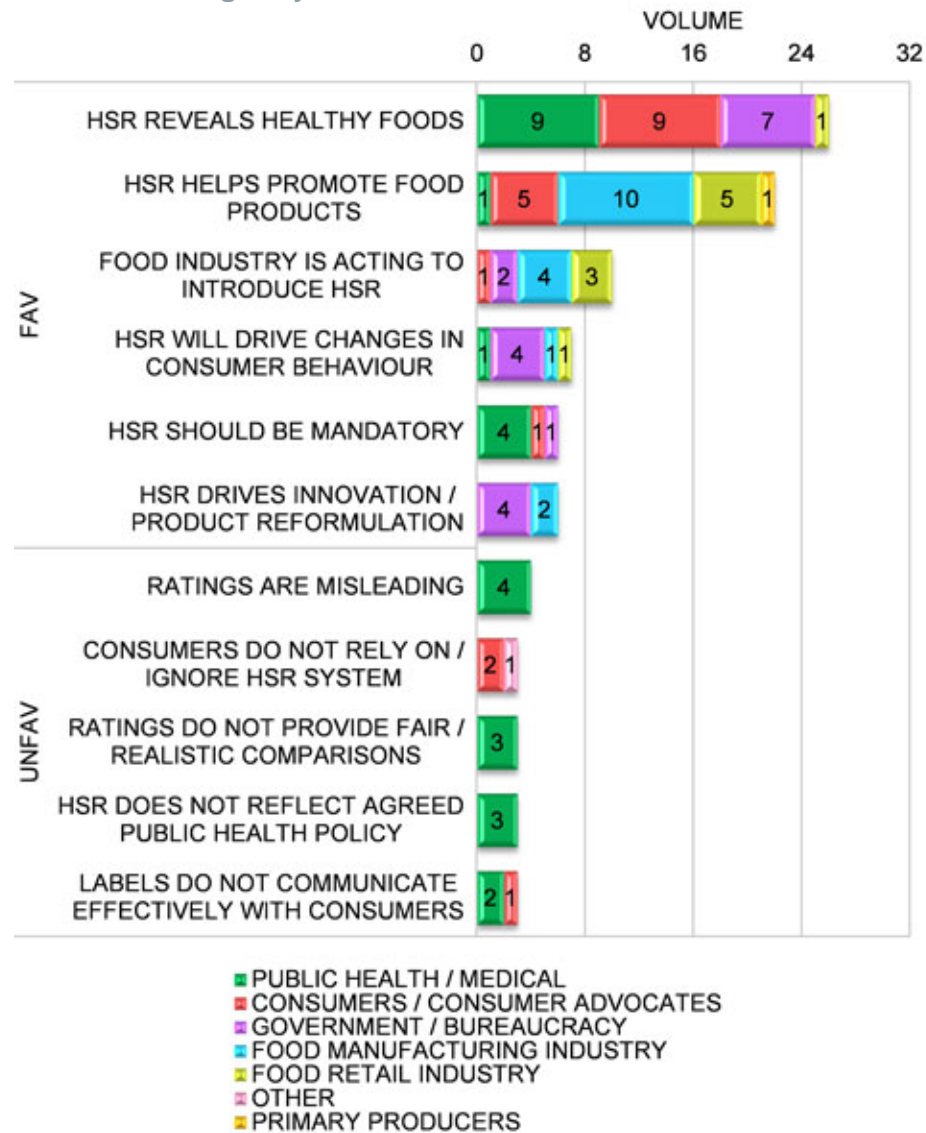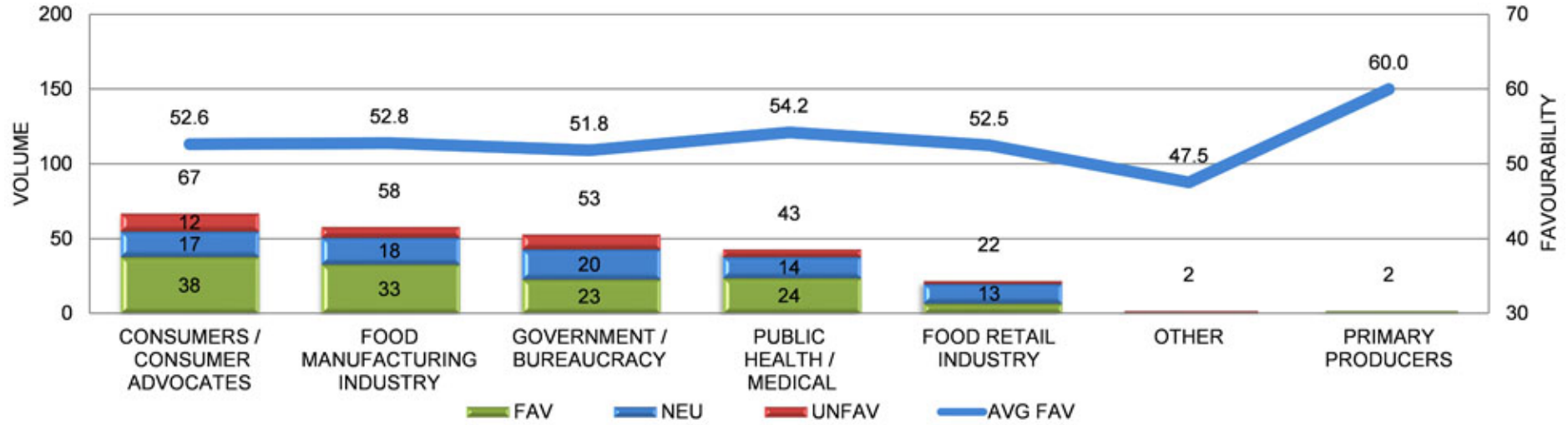**Chart 25 Messages by stakeholders: Quarter 3 2015**

Table 6 Leading spokespeople: Quarter 3 2015
This table shows the most frequently cited spokespeople in Quarter 3 2015, the volume of reports in which they were cited, and the average favourability of this coverage.

Spokespeople	Vol	Avg Fav
Mark Lawrence, Deakin University	6	50.8
Megan Doyle, Canstar Blue	5	42.0
Tom Godfrey, CHOICE	5	53.0
Fiona Nash, Former Federal Assistant Health Minister	4	70.0

Chart 26 Stakeholders: Quarter 3 2015

Stacked bar chart showing VOLUME (left axis, 0–200) and FAVOURABILITY (right axis, 30–70) for stakeholder categories.

Stakeholder	FAV	NEU	UNFAV	Total	AVG FAV
CONSUMERS / CONSUMER ADVOCATES	38	17	12	67	52.6
FOOD MANUFACTURING INDUSTRY	33	18		58	52.8
GOVERNMENT / BUREAUCRACY	23	20		53	51.8
PUBLIC HEALTH / MEDICAL	24	14		43	54.2
FOOD RETAIL INDUSTRY		13		22	52.5
OTHER				2	47.5
PRIMARY PRODUCERS				2	60.0

Legend: FAV, NEU, UNFAV, AVG FAV

Quarter 4 2015

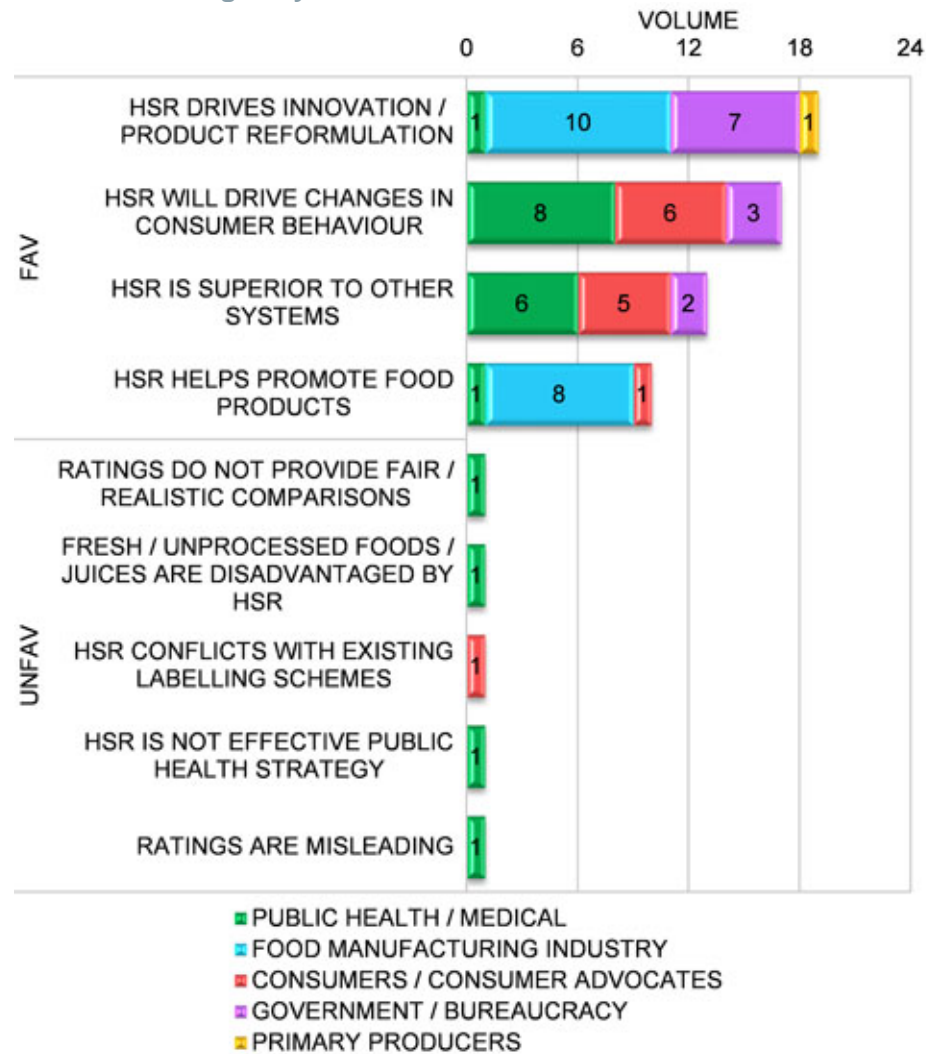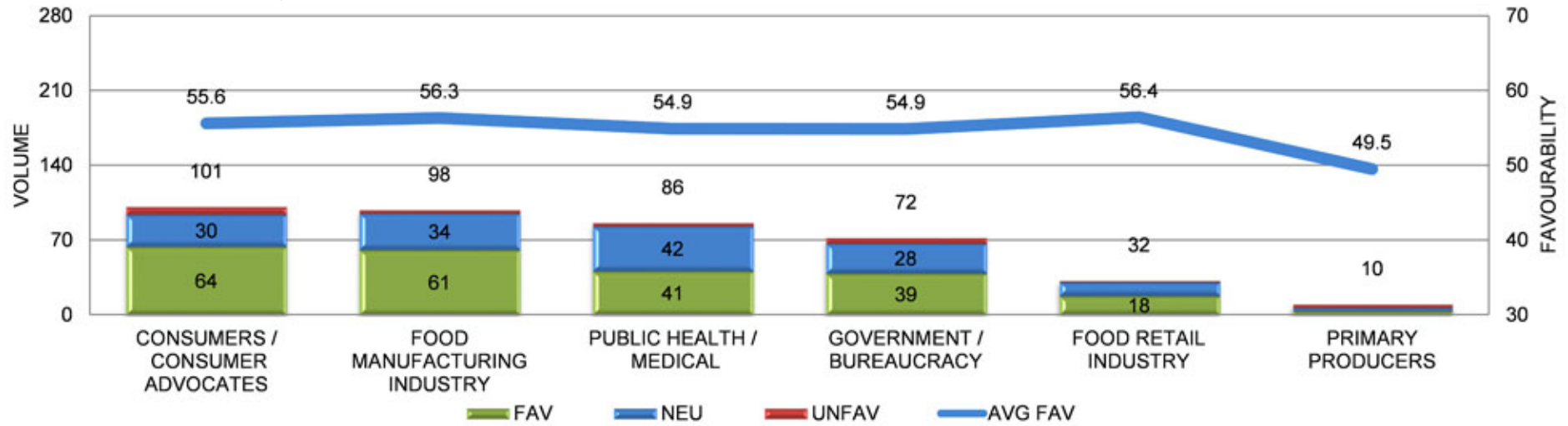**Chart 27 Messages by stakeholders: Quarter 4 2015**

Table 7 Leading spokespeople: Quarter 4 2015
This table shows the most frequently cited spokespeople in Quarter 4 2015, the volume of reports in which they were cited, and the average favourability of this coverage.

Spokespeople	Vol	Avg Fav
Mary Barry, Heart Foundation	15	55.0
Susan Kevork, Nestle Group Nutritionist	13	51.9
Kristina Petersen, The George Institute	11	50.0
Tom Godfrey, CHOICE	10	60.5
Unnamed Source, Vox Pop	9	50.0

Chart 28 Stakeholders: Quarter 4 2015

Chart showing Volume (left axis, 0–280) and Favourability (right axis, 30–70) by stakeholder group.

Stakeholder	FAV	NEU	UNFAV total	AVG FAV
CONSUMERS / CONSUMER ADVOCATES	64	30	101	55.6
FOOD MANUFACTURING INDUSTRY	61	34	98	56.3
PUBLIC HEALTH / MEDICAL	41	42	86	54.9
GOVERNMENT / BUREAUCRACY	39	28	72	54.9
FOOD RETAIL INDUSTRY	18		32	56.4
PRIMARY PRODUCERS			10	49.5

Legend: FAV, NEU, UNFAV, AVG FAV

Quarter 1 2016

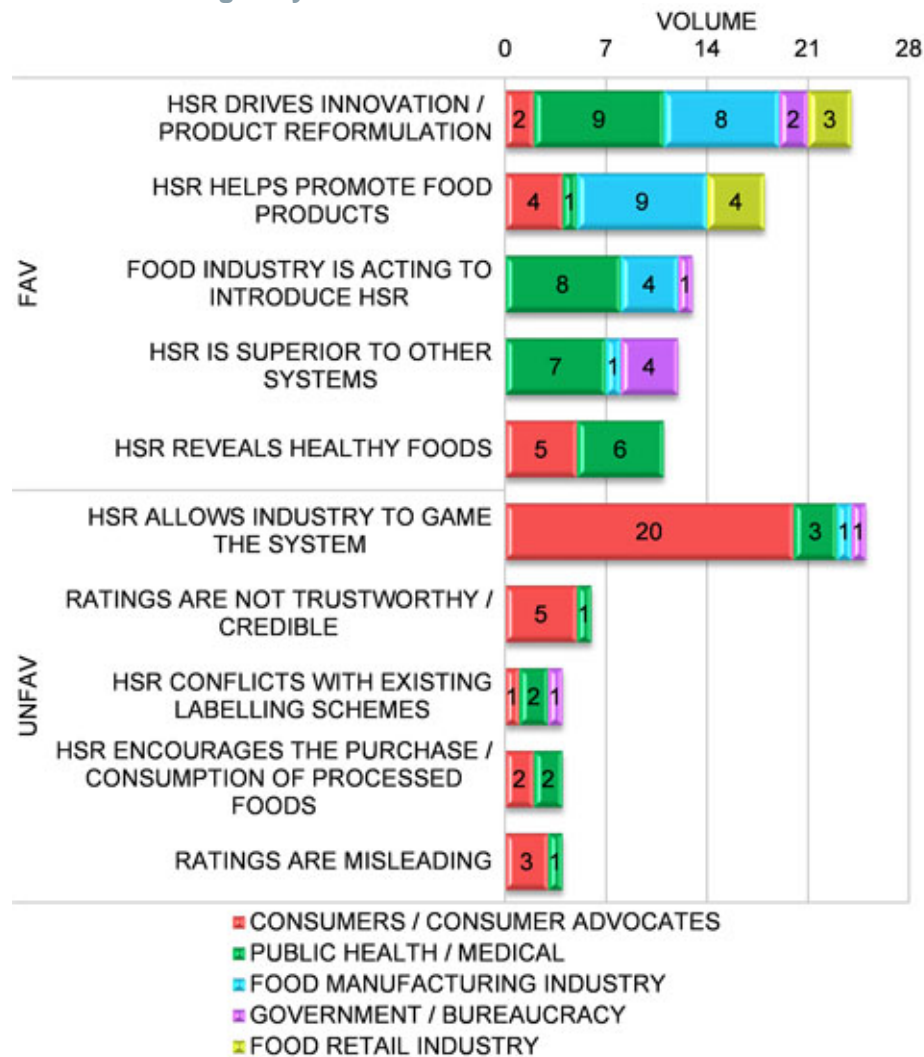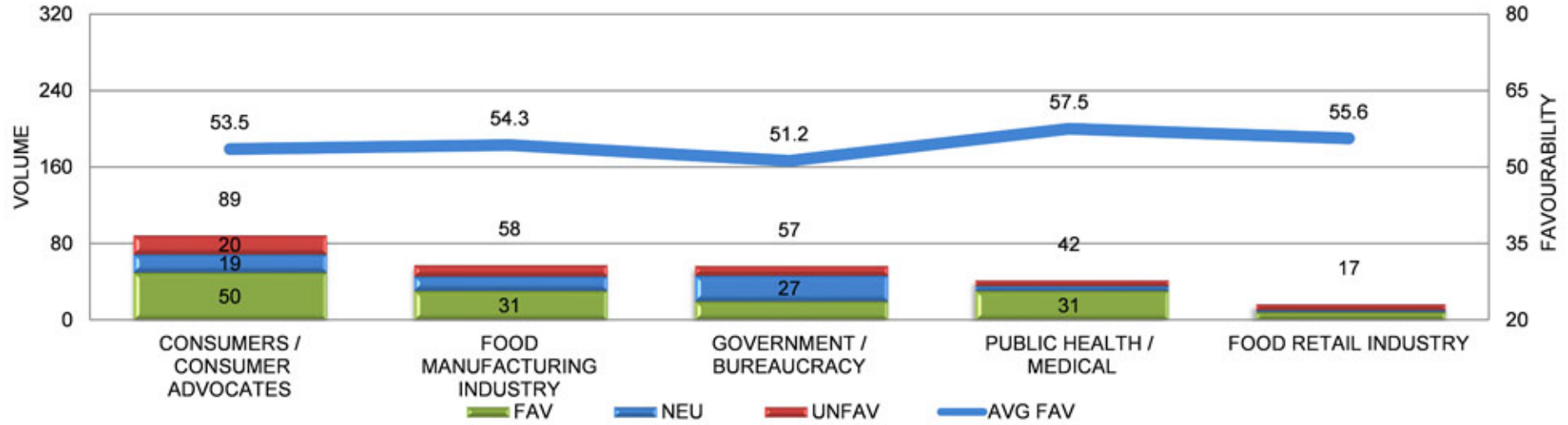**Chart 29 Messages by stakeholders: Quarter 1 2016**

Table 8 Leading spokespeople: Quarter 1 2016
This table shows the most frequently cited spokespeople in Quarter 1 2016, the volume of reports in which they were cited, and the average favourability of this coverage.

Spokespeople	Vol	Avg Fav
Tom Godfrey, CHOICE	22	49.1
Unnamed Source, Kellogg's	11	47.7
Michael Moore, Public Health Association	10	65.5
Kate Freeman, Nutritionist	8	68.1
Mark Lawrence, Deakin University	6	39.2

Chart 30 Stakeholders: Quarter 1 2016

Quarter 2 2016

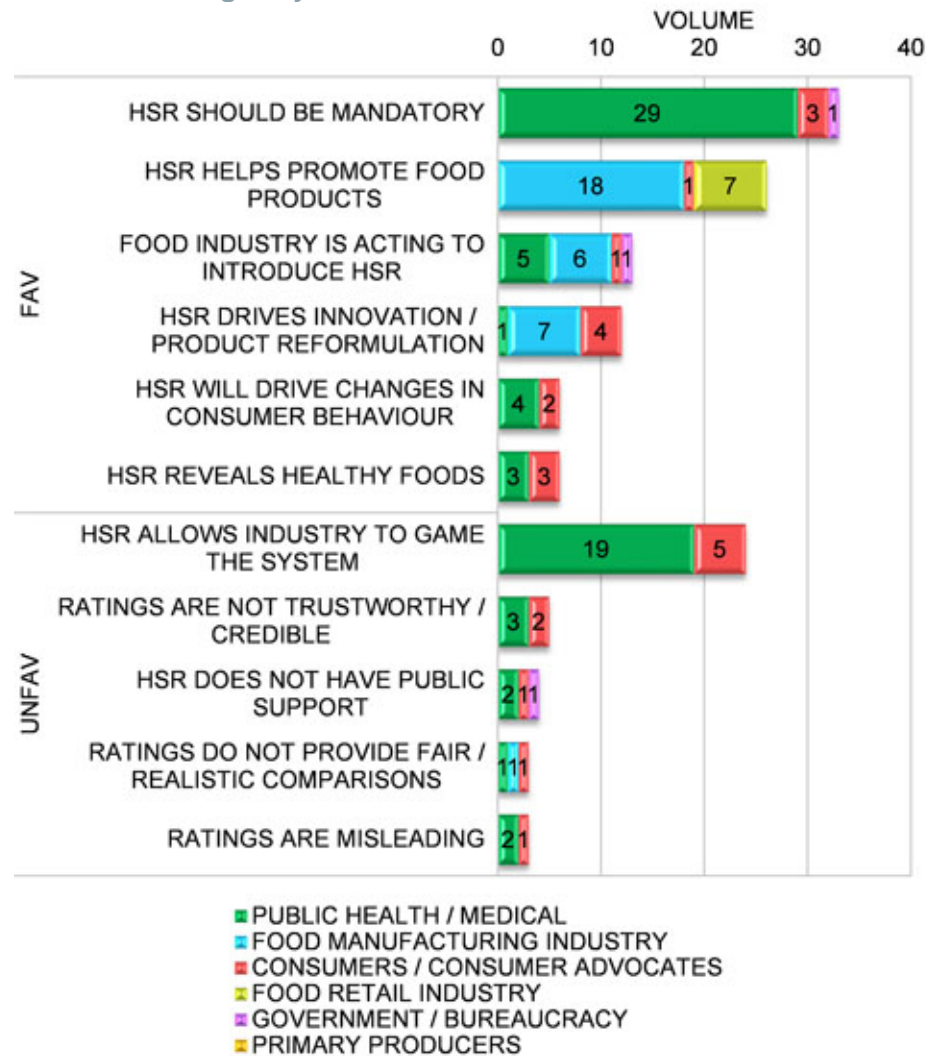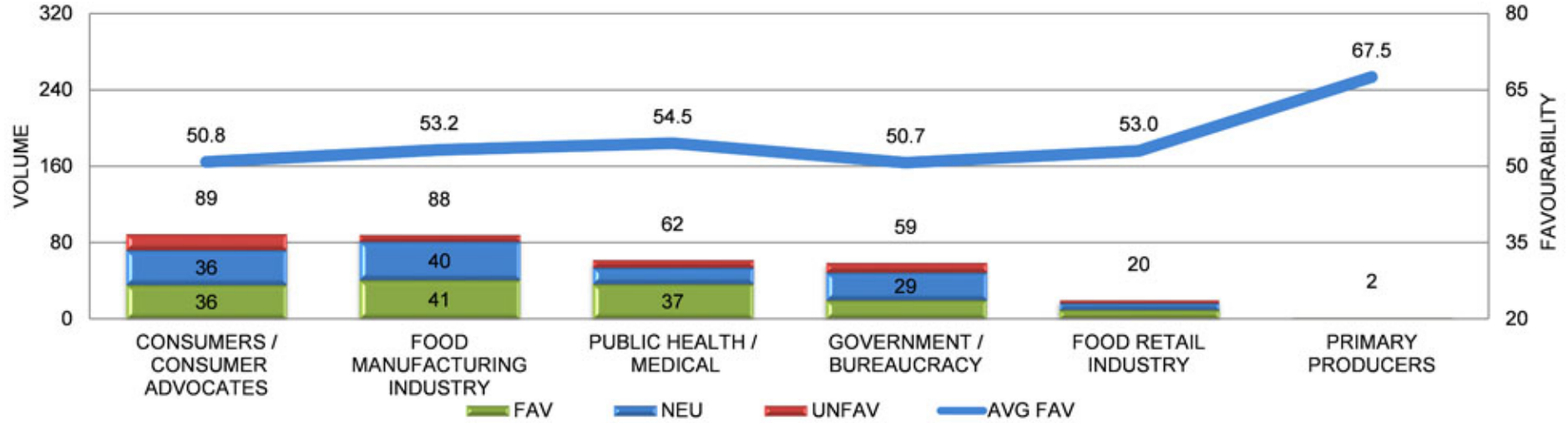**Chart 31 Messages by stakeholders: Quarter 2 2016**

Table 9 Leading spokespeople: Quarter 2 2016
This table shows the most frequently cited spokespeople in Quarter 2 2016, the volume of reports in which they were cited, and the average favourability of this coverage.

Spokespeople	Vol	Avg Fav
Jane Martin, Obesity Policy Coalition	41	53.9
Alison Ginn, Cancer Council Dietician	8	55.6
Food Retail Industry Spokesperson	8	57.5
Claire Deeks, Auckland Food Blogger	7	32.1
Rosemary Stanton, HSR Technical Committee	5	35.0
Fiona Nash, Former Federal Assistant Health Minister	5	54.0
Unnamed Source, Kellogg's	5	46.0

Chart 32 Stakeholders: Quarter 2 2016

	CONSUMERS / CONSUMER ADVOCATES	FOOD MANUFACTURING INDUSTRY	PUBLIC HEALTH / MEDICAL	GOVERNMENT / BUREAUCRACY	FOOD RETAIL INDUSTRY	PRIMARY PRODUCERS
AVG FAV	50.8	53.2	54.5	50.7	53.0	67.5
Total	89	88	62	59	20	2
NEU	36	40		29		
FAV	36	41	37			

Legend: FAV, NEU, UNFAV, AVG FAV

Leading Media

Chart 33 Leading media: press

Chart 33 Leading media: press

	RETAIL WORLD	FOOD & DRINK BUSINESS	CHOICE	CONVENIENCE WORLD	AUSTRALIAN HEALTHY FOOD GUIDE
Total	33	26	19	18	18
NEU	13	12	5	6	8
FAV	20	12	13	12	10
AVG FAV	56.2	53.7	56.1	56.9	54.4
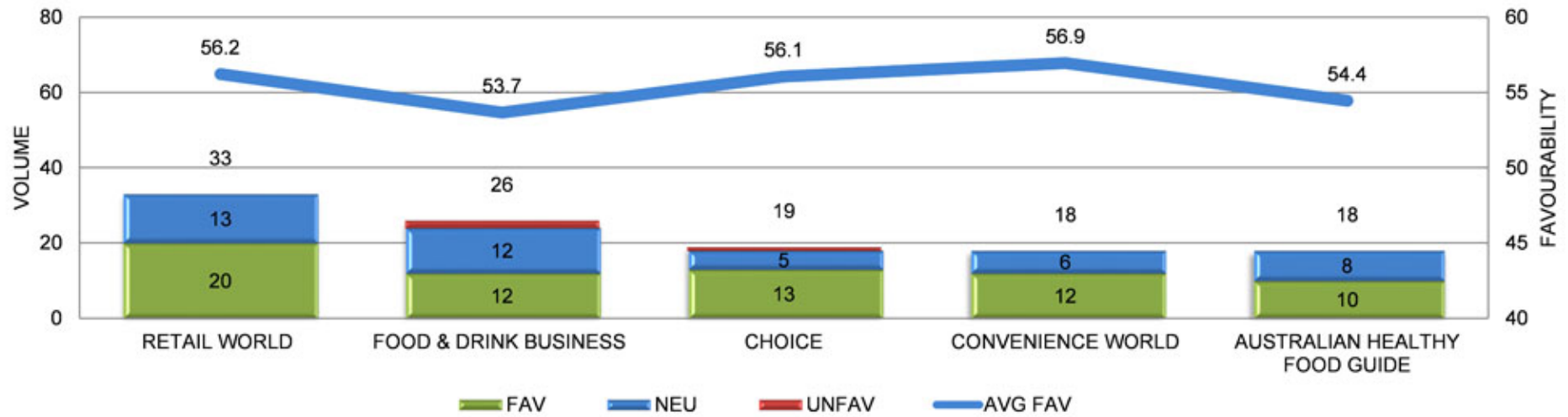
Chart 34 Leading media: radio

	6PR PERTH	CURTIN FM	FIVEAA	ABC RADIO SYDNEY	2GB SYDNEY	WAVE FM	4BC BRISBANE
Total	8	7	7	6	6	6	6
UNFAV	1		2				1
NEU	4	4	3	6	4	3	4
FAV	3	3	2		2	3	1
AVG FAV	53.1	56.4	50.7	50.0	52.5	55.8	50.0

FAV   NEU   UNFAV   AVG FAV
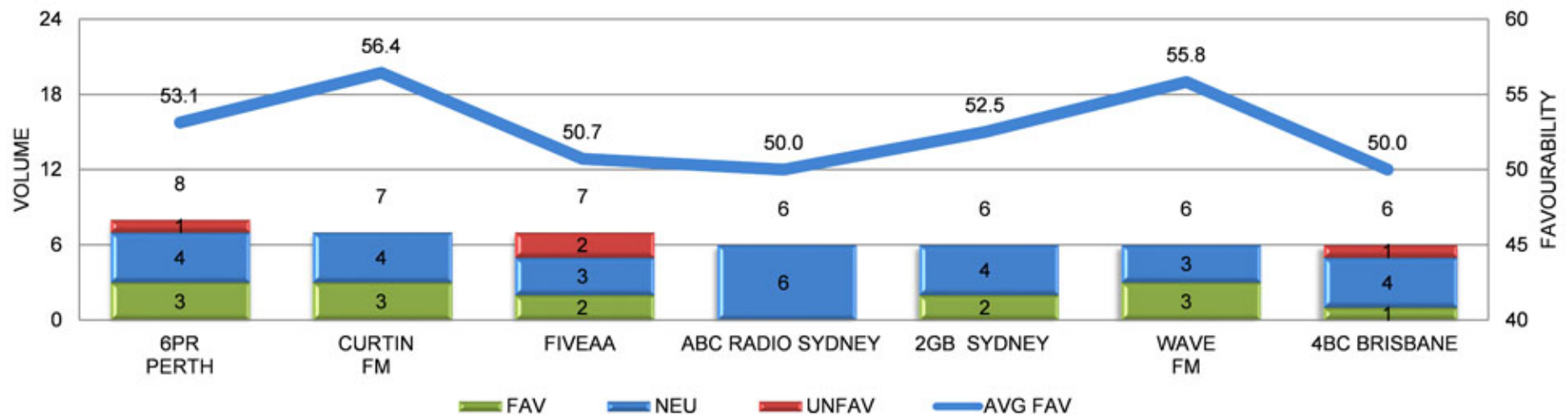
Chart 35 Leading media: television

Television chart showing VOLUME (left axis) and FAVOURABILITY (right axis):

	CHANNEL 7 BRISBANE	CHANNEL 9 PERTH	ABC NEWS 24	SKY NEWS AUSTRALIA	WIN CANBERRA	CHANNEL 7 MELBOURNE
Total	10	6	5	3	3	3
NEU	6	4	2			
FAV	3	2	3	2	3	2
AVG FAV	53.5	55.0	61.0	56.7	68.3	53.3

Legend: FAV, NEU, UNFAV, AVG FAV

Chart 36 Leading media: internet

Internet chart showing VOLUME (left axis) and FAVOURABILITY (right axis):

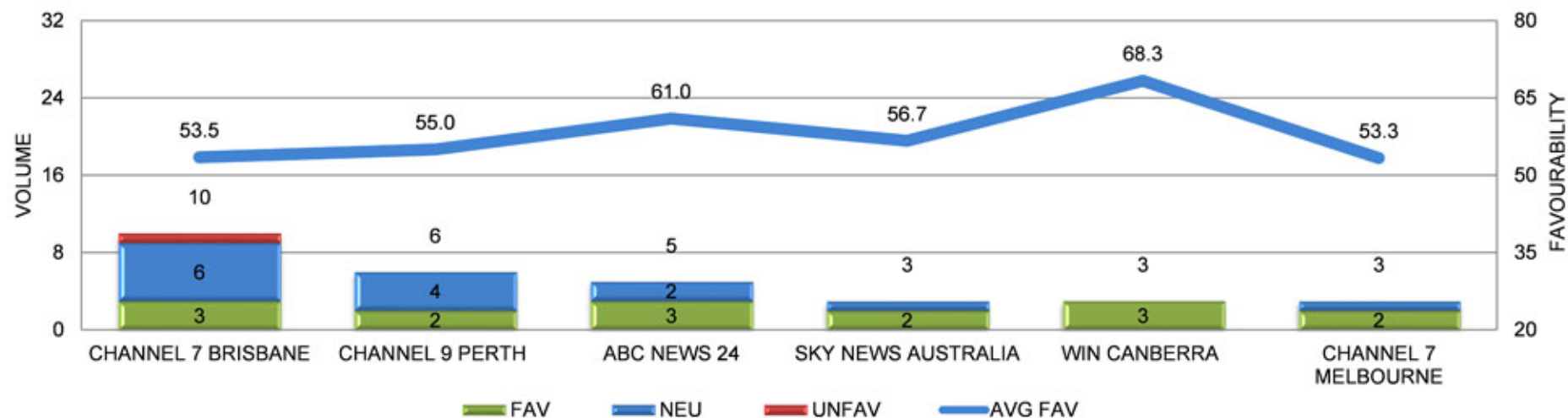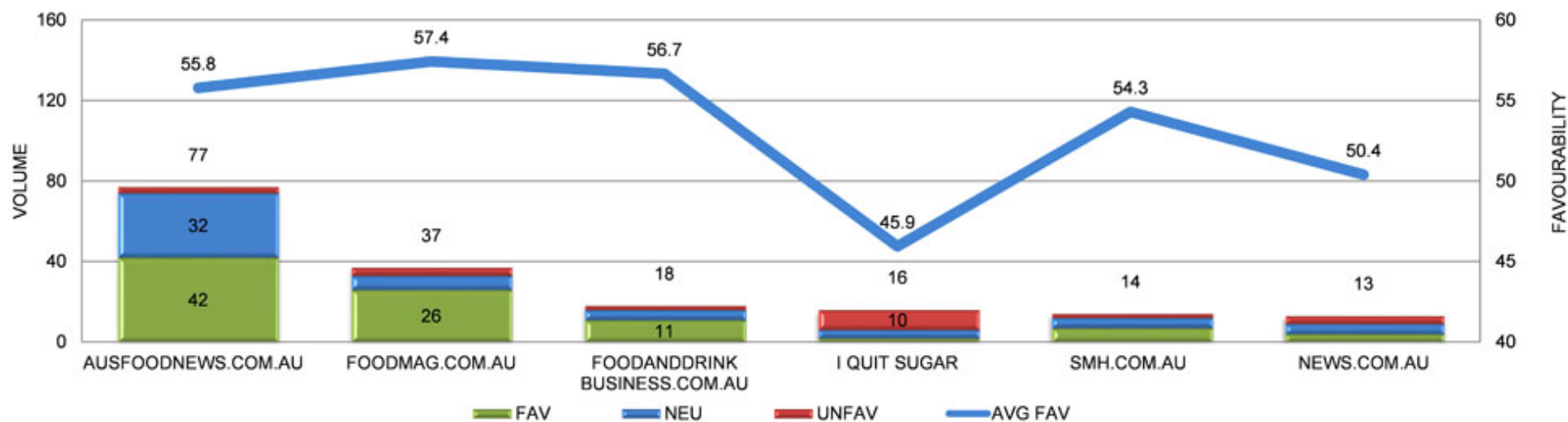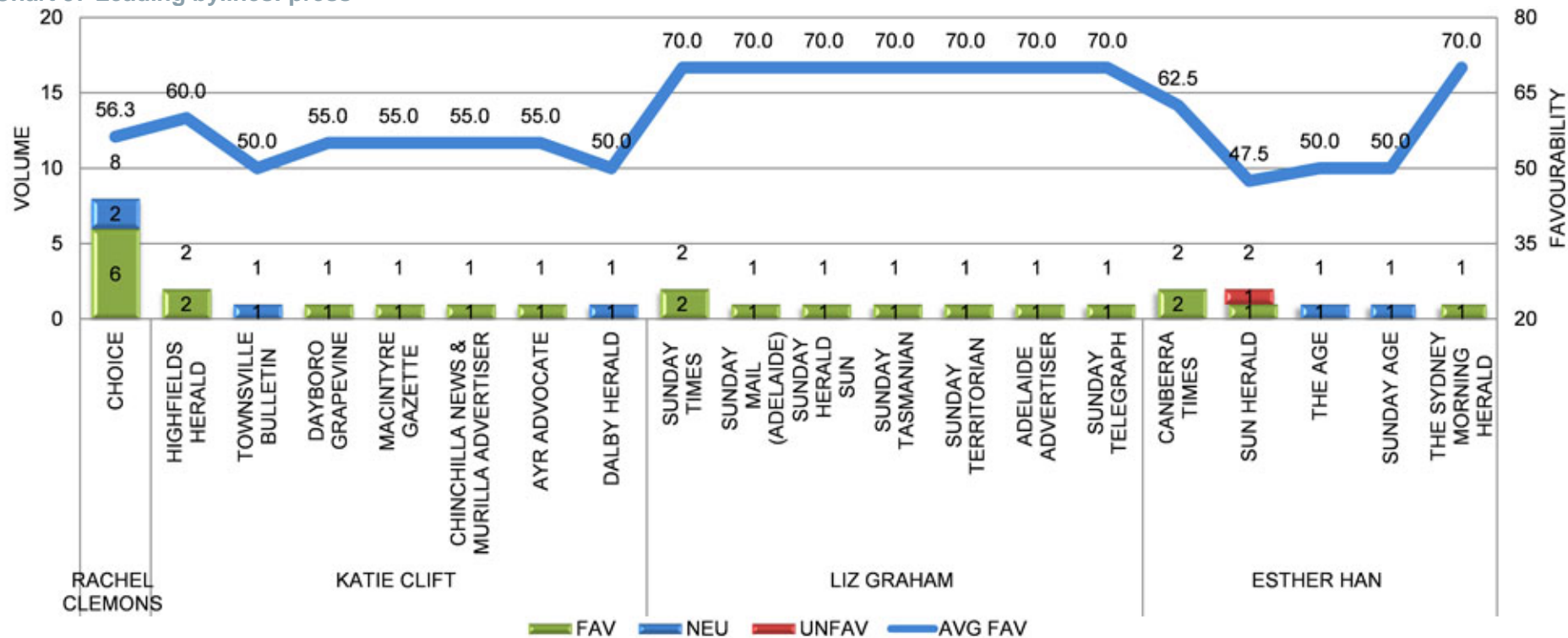|	AUSFOODNEWS.COM.AU	FOODMAG.COM.AU	FOODANDDRINK BUSINESS.COM.AU	I QUIT SUGAR	SMH.COM.AU	NEWS.COM.AU
Total	77	37	18	16	14	13
NEU	32					
FAV	42	26	11			
UNFAV				10		
AVG FAV	55.8	57.4	56.7	45.9	54.3	50.4

Legend: FAV, NEU, UNFAV, AVG FAV

Leading Bylines/Comperes

Chart 37 Leading bylines: press

The following tables show the leading comperes and bylines in radio, television and internet coverage; a breakdown of their reports by favourability and outlet; and the average favourability of this coverage.

Table 10 Leading comperes: radio

Compere Name	Media Name	Fav	Neu	Unf	Vol	Avg Fav
Loretta Ryan		2	0	0	2	62.5
	ABC Southern Queensland	1	0	0	1	60.0
	ABC Sunshine & Cooloola Coasts	1	0	0	1	65.0
Annie Gaffney		2	0	0	2	65.0
	ABC Sunshine & Cooloola Coasts	2	0	0	2	65.0
Adam Shirley		1	1	0	2	55.0
	ABC Radio Canberra	1	1	0	2	55.0
Gary Adshead		1	1	0	2	60.0
	6PR Perth	1	1	0	2	60.0
Leon Byner		1	0	1	2	52.5
	FIVEaa Adelaide	1	0	1	2	52.5
Mark Colvin		2	0	0	2	60.0
	666 ABC Canberra	1	0	0	1	60.0
	ABC Radio National	1	0	0	1	60.0
Chris Smith		1	1	0	2	55.0
	2GB Sydney	1	1	0	2	55.0
Steve Austin		1	1	0	2	55.0
	ABC Radio Brisbane	0	1	0	1	50.0
	612 ABC Brisbane	1	0	0	1	60.0

Table 11 Leading comperes: television

Compere Name	Media Name	Fav	Neu	Unf	Vol	Avg Fav
Paul Lobb		1	4	0	5	54.0
	NBN Newcastle	1	1	0	2	60.0
	NBN Central Coast	0	1	0	1	50.0
	NBN Coffs Harbour	0	1	0	1	50.0
	NBN Lismore	0	1	0	1	50.0
Natasha Beyersdorf		0	4	0	4	50.0
	NBN Coffs Harbour	0	1	0	1	50.0
	NBN Central Coast	0	1	0	1	50.0
	NBN Newcastle	0	1	0	1	50.0
	NBN Lismore	0	1	0	1	50.0
Edwina Seselja		3	0	0	3	75.0
	WIN Gippsland	1	0	0	1	75.0
	WIN Wagga Wagga	1	0	0	1	75.0
	WIN Canberra	1	0	0	1	75.0
Geoff Philips		1	1	0	2	55.0
	WIN Orange	0	1	0	1	50.0
	WIN Canberra	1	0	0	1	60.0
Paul Kennedy		1	1	0	2	57.5
	ABC News 24	1	1	0	2	57.5
Jo Palmer		1	1	0	2	52.5
	Southern Cross TV Hobart	0	1	0	1	50.0
	Southern Cross Northern Tasmania	1	0	0	1	55.0
Jackie Quist		0	2	0	2	50.0

Compere Name	Media Name	Fav	Neu	Unf	Vol	Avg Fav
	Channel 7 Brisbane	0	1	0	1	50.0
	Channel 7 Melbourne	0	1	0	1	50.0
John Barron		0	2	0	2	50.0
	ABC News 24	0	2	0	2	50.0
Jennifer Keyte		0	2	0	2	50.0
	Channel 7 Brisbane	0	2	0	2	50.0
Peter Mitchell		2	0	0	2	55.0
	Channel 7 Melbourne	2	0	0	2	55.0
Tim McMillan		1	1	0	2	60.0
	Channel 9 Perth	1	1	0	2	60.0

Byline Name	Media Name	Fav	Neu	Unf	Vol	Avg Fav
	I Quit Sugar	1	0	4	5	47.0
Andrea Hogan		1	4	0	5	52.0
	ausfoodnews.com.au	1	4	0	5	52.0
Bevan Shields		0	5	0	5	50.0
	canberratimes.com.au	0	1	0	1	50.0
	brisbanetimes.com.au	0	1	0	1	50.0
	watoday.com.au	0	1	0	1	50.0
	theage.com.au	0	1	0	1	50.0
	smh.com.au	0	1	0	1	50.0

Table 12 Leading bylines: internet

Byline Name	Media Name	Fav	Neu	Unf	Vol	Avg Fav
Vanessa Brown		5	3	0	8	55.0
	news.com.au	2	1	0	3	53.3
	perthnow.com.au	1	2	0	3	53.3
	themercury.com.au	1	0	0	1	65.0
	dailytelegraph.com.au	1	0	0	1	55.0
Esther Han		5	0	0	5	63.0
	smh.com.au	2	0	0	2	70.0
	canberratimes.com.au	1	0	0	1	55.0
	watoday.com.au	1	0	0	1	65.0
	farm weekly online	1	0	0	1	55.0
Rachel O'Regan		1	0	4	5	47.0

Methodology

Best Practice Media Analysis

The media analysis methodology used by Isentia has a systematic approach to turn media content into meaningful data. This approach analyses media content both quantitatively and qualitatively.

Isentia uses the CARMA® media content analysis methodology, which is internationally recognised as one of the leading commercial systems available. CARMA® (Computer Aided Research and Media Analysis) uses advanced technology to quantify media content, and human intelligence to provide qualitative insight and analysis.

Isentia uses the CARMA® methodology to qualitatively analyse media coverage by taking into account multiple variables. These include the:

- Placement of media reports (front page or lead item in broadcast media and websites);

- Positioning of organisation discussion (headline, prominent mentions, passing mentions);

- Image (photos, illustrations, charts, cartoons, or the image content of video);

- Topics discussed in the media and their relative importance to the client organisation;

- Messages, both favourable and unfavourable, communicated in media reports;

- Sources quoted (both organisation representatives and other individuals who make relevant comments in the media); and

- Tone of content (extreme language, adjectives and adverbs, metaphors or similes and other figures of speech).

An aggregate score is calculated based on these multiple variables and presented on a 0–100 scale where 50 is neutral. This is an overall rating of the favourability of each media report towards the client organisation (and, if relevant, other organisations or competitors). This aggregate score is called the CARMA® Favourability Rating.
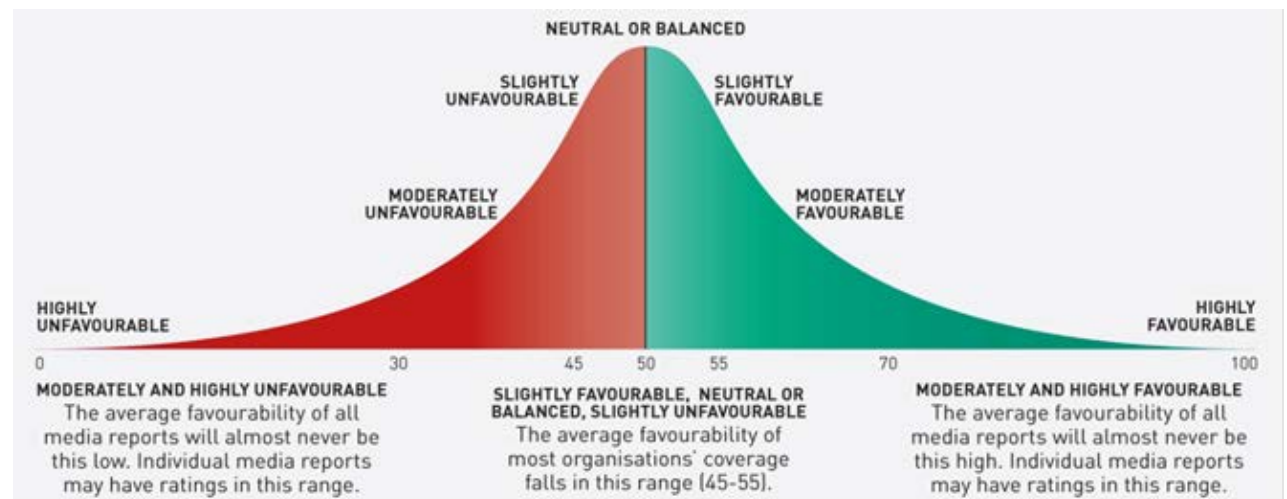
The average favourability is the aggregated rating of the media coverage analysed. This can identify the potential impact of media reporting, and can be used to identify trends and establish benchmarks for future data.

The criteria for analysis (such as topics and specific key messages) are set up uniquely for each individual client by a team of media analysis experts. These experts bring their industry knowledge to identify key issues and attitudes that appear in the media, answer clients' key questions, and, where relevant, provide recommendations for further action.

The consistency of analysis is ensured in three key ways:

- Most of the variables analysed are objective criteria (such as media name, positioning, sources' names);

- The somewhat more subjective topics and messages are identified by either exact phrasing or acceptable alternatives, provided to researchers before analysis begins; and

- Isentia uses multiple researchers on projects to minimise individual subjectivity.

The image below shows the scale of average favourability ratings on a bell curve.