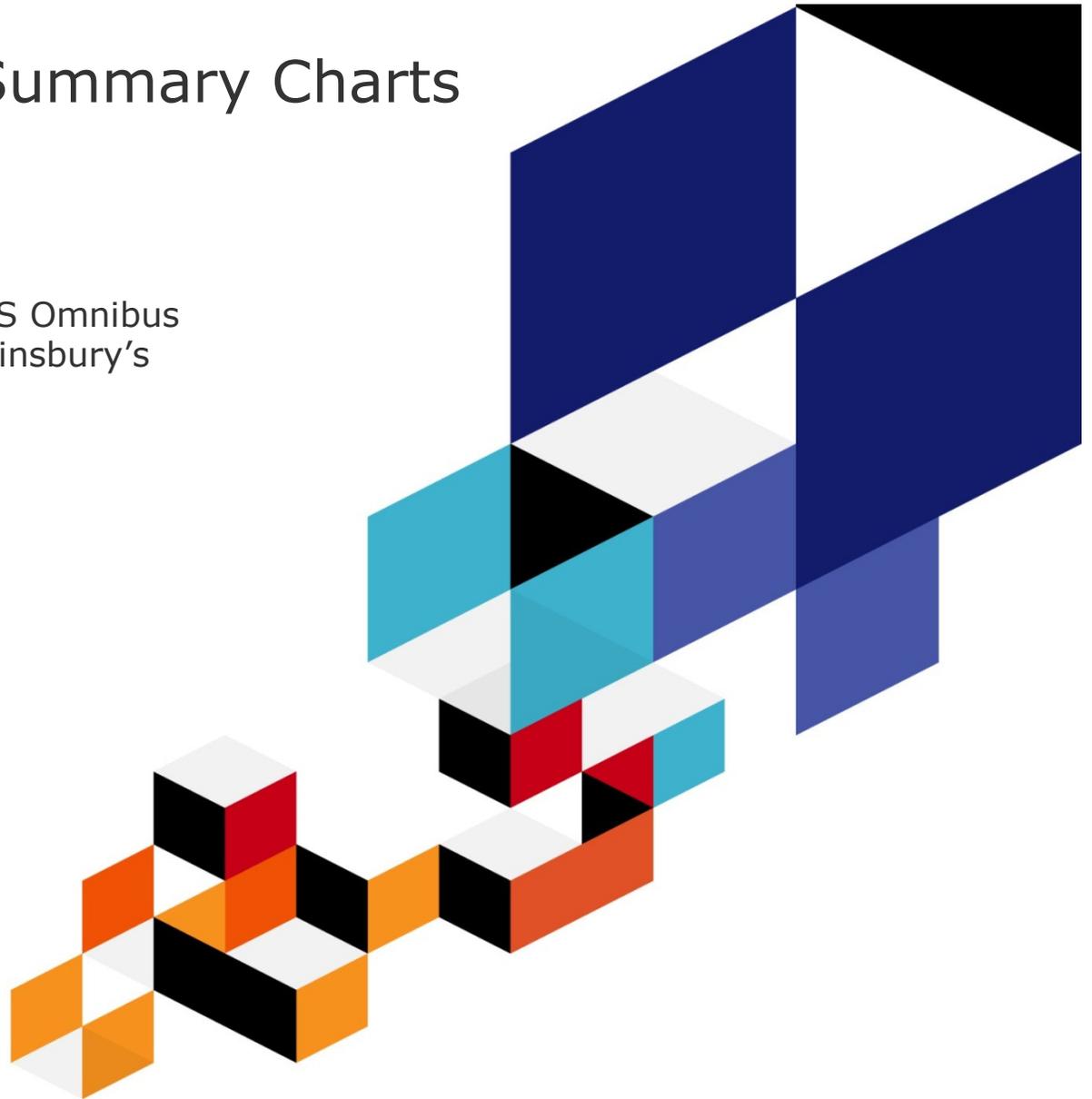


Healthy Labelling - Summary Charts

5th December 2012

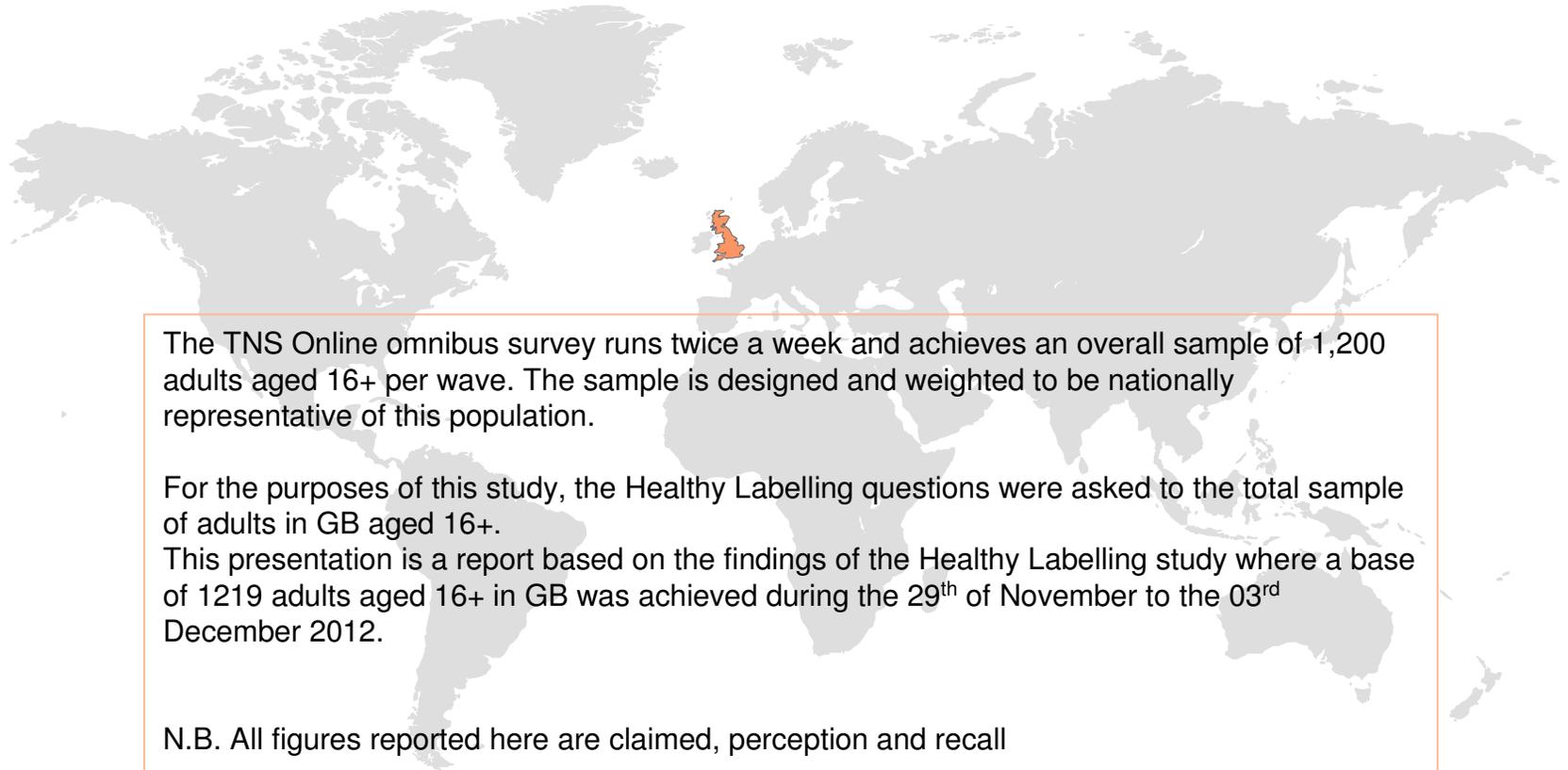
Produced by: Akram Abu-Oun / TNS Omnibus
Produced for: Richard Beagley / Sainsbury's



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Methodology



The TNS Online omnibus survey runs twice a week and achieves an overall sample of 1,200 adults aged 16+ per wave. The sample is designed and weighted to be nationally representative of this population.

For the purposes of this study, the Healthy Labelling questions were asked to the total sample of adults in GB aged 16+.

This presentation is a report based on the findings of the Healthy Labelling study where a base of 1219 adults aged 16+ in GB was achieved during the 29th of November to the 03rd December 2012.

N.B. All figures reported here are claimed, perception and recall

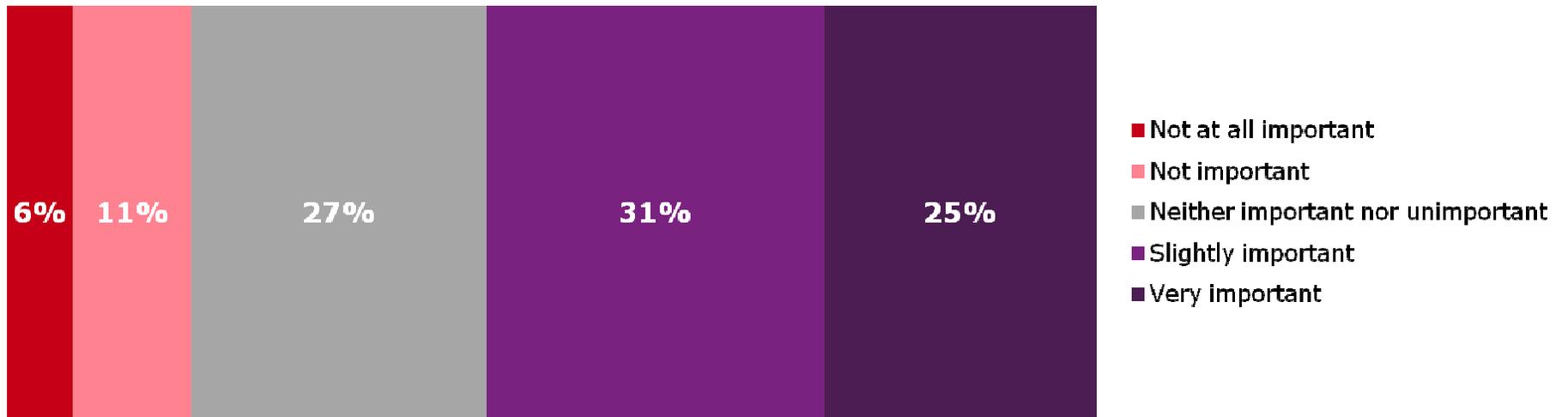
Summary

When shopping for food and groceries:

- Just over one half of adults find nutritional information on the front of the pack important.
- Calories is rated as the most important nutritional information on the front of the pack.
- Salt however has the highest mean score in terms of the most important nutritional information on the front of the pack, with calories coming second.
- Coloured calorie coding was more helpful than non-coloured, notably for the desserts and mayonnaise examples.
- Value for money is the most important consideration, with health a lower consideration than quality and taste.
- About one half of adults find colour coding useful in helping make a healthy choice.

Just over one half of shoppers find nutritional information on the front of the pack important.

How important is nutritional information on the front of the pack?



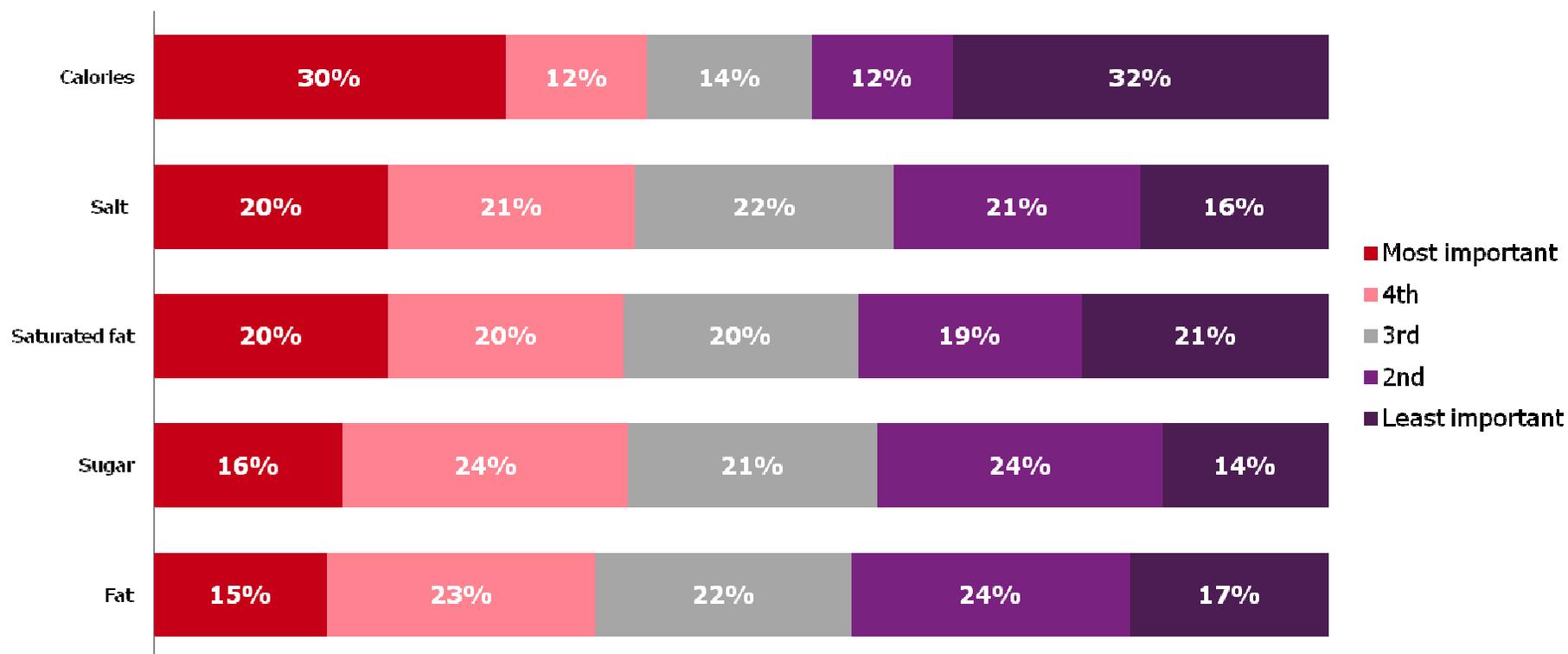
Q2. How important is nutritional information on the front of the pack when shopping for food and groceries?
Base: Total sample n=1219 adults in GB aged 16+, Asda n = 264 adults that spend most at Asda on their food and groceries, Morrisons n = 144 adults that spend most at Morrisons on their food and groceries, Sainsbury's n = 233 adults that spend most at Sainsbury's on their food and groceries, Tesco n = 411 adults that spend most at Tesco on their food and groceries, Discounters n = 70 adults that spend most at Discounters (e.g.. Aldi) on their food and groceries and Other supermarkets n = 67 adults that spend most at other supermarkets (e.g. M&S, Waitrose) on their food and groceries

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Overall adults find Calories the most important nutritional information on the front of the pack with nearly 1 in 3 adults stating this was most important (significantly different than all the other nutritional information).

How important is the following nutritional information on the front of the pack: All adults



Q3. Generally when shopping for food and groceries, how important is the following nutritional information on the front of the pack?
 Base: Total sample n=1219 adults in GB aged 16+

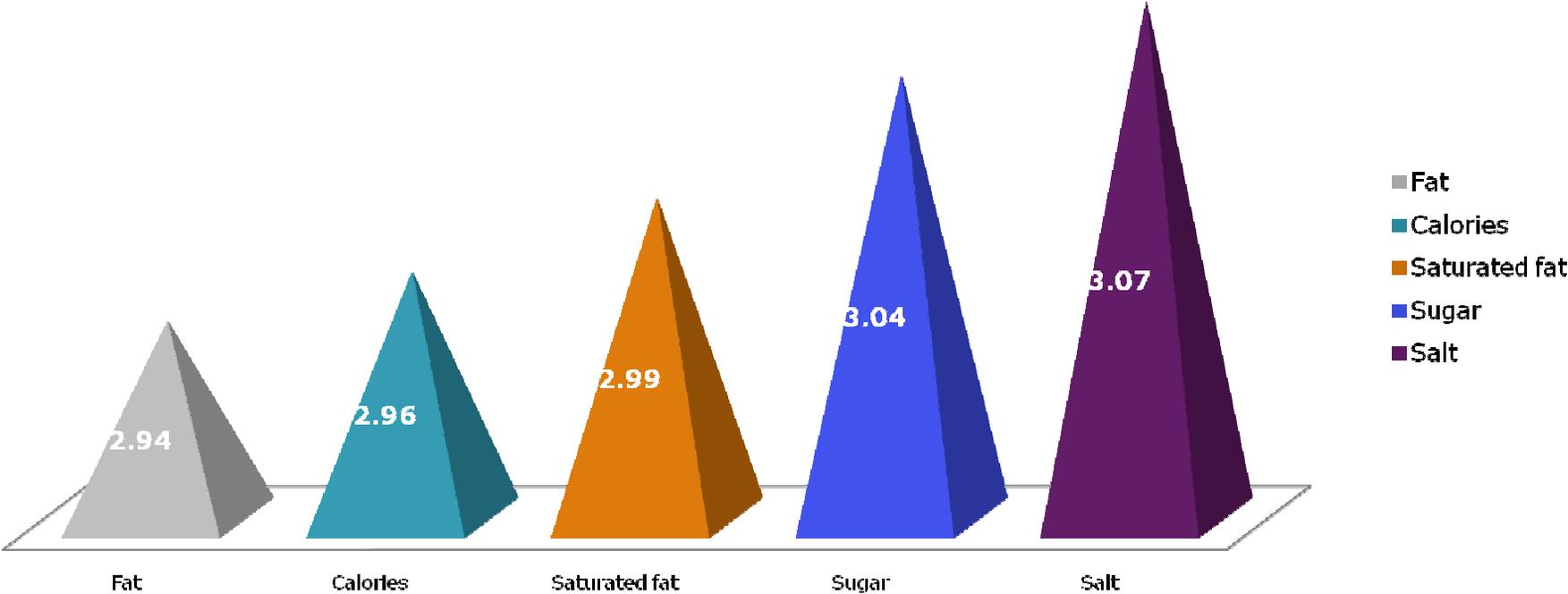


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When looking at the mean score for how important each nutritional information is, Salt has the highest overall score on the front of the pack (significantly different to Fat)

How important is the following nutritional information on the front of the pack: Mean score – All adults



Q3. Generally when shopping for food and groceries, how important is the following nutritional information on the front of the pack?
Base: Total sample n=1219 adults in GB aged 16+

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1 in 2 adults state there is no difference between the two colour coding labels for calories. Slightly more adults find the colour coding on Image 1 most helpful.

Which colour coding is most/least helpful – Ready Meal – All adults

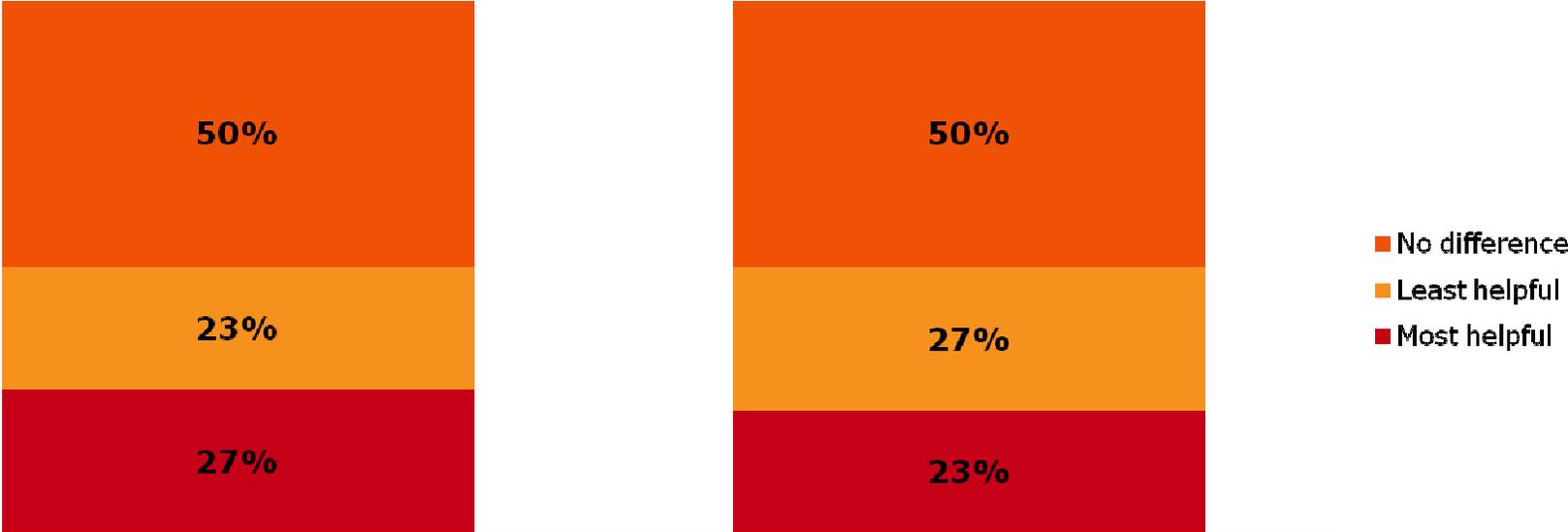


Image 1



Image 2



Q4.1 We are now going to show you three front pack examples that show nutritional labels. From these three examples please answer each question in turn by telling us which colour coding is most/least helpful for calories READY MEALS

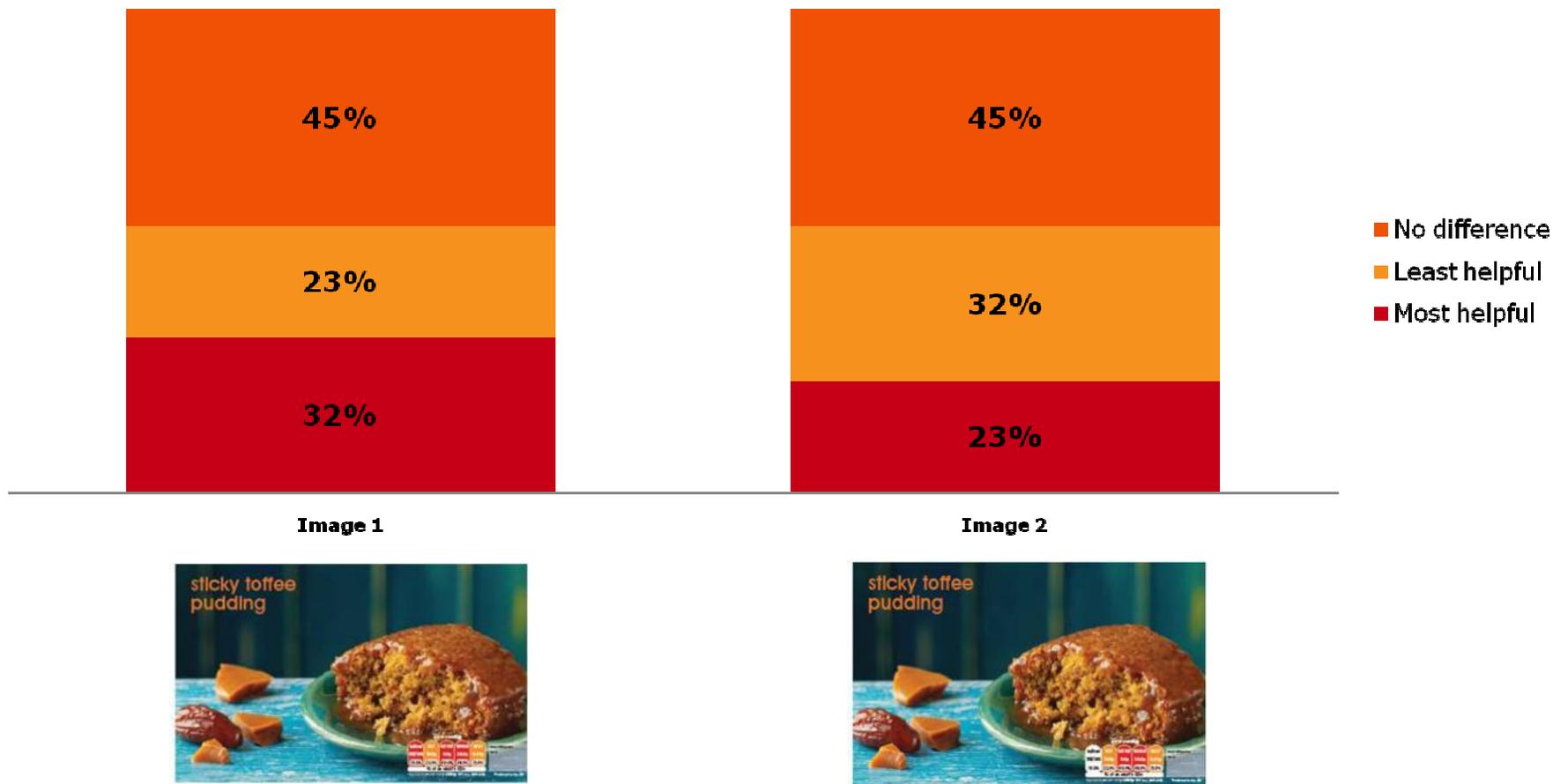
Base: Total sample n=1219 adults in GB aged 16+

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Again slightly less than half of adults stated that there is no difference between the colour coding labels. Of those that did state a preference, 32% stated that image 1 was most helpful. (Significantly different than image 2)

Which colour coding is most/least helpful – Desserts- All adults



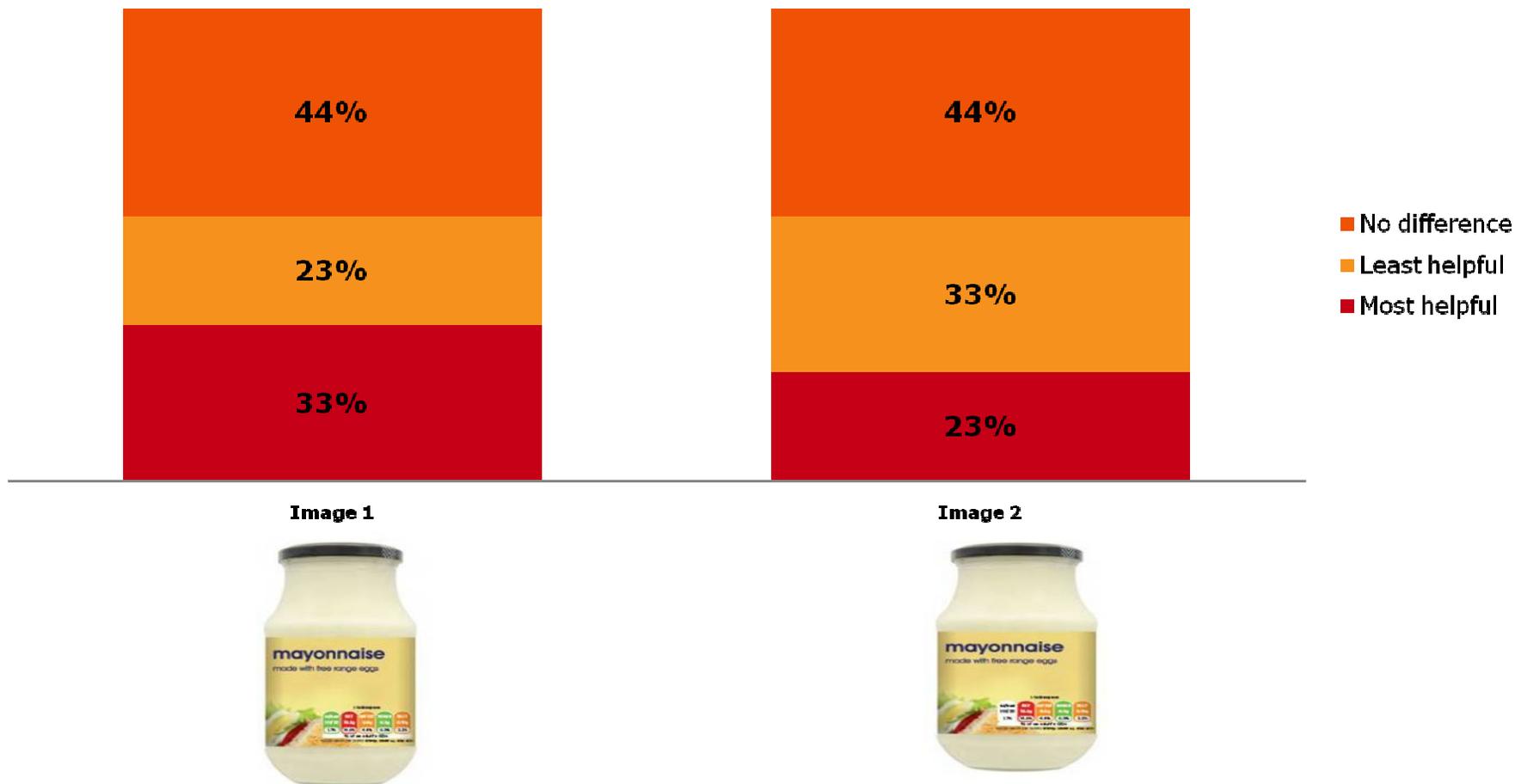
Q4.2 We are now going to show you three front pack examples that show nutritional labels. From these three examples please answer each question in turn by telling us which colour coding is most/least helpful for calories DESSERT
 Base: Total sample n=1219 adults in GB aged 16+

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33% of adults stated that image 1 was most helpful for calories (significantly different than image 2). Over 4 in 10 adults stated that there is no difference

Which colour coding is most/least helpful – Mayonnaise– All adults



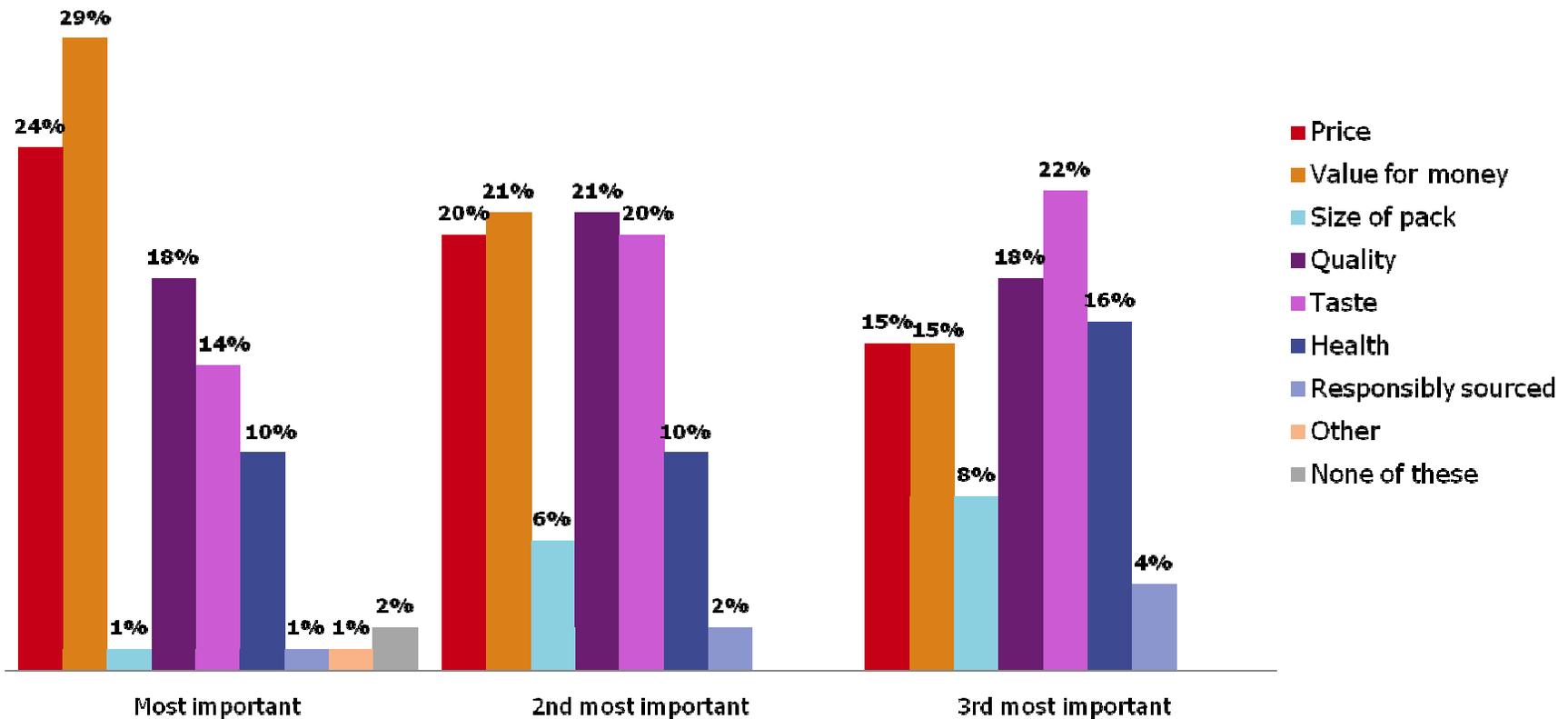
Q4.3 We are now going to show you three front pack examples that show nutritional labels. From these three examples please answer each question in turn by telling us which colour coding is most/least helpful for calories MAYONNAISE
 Base: Total sample n=1219 adults in GB aged 16+

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Value For Money is the most important consideration with health lower than quality and taste

Top 3 most important factors – All Adults



Q5. When shopping in a supermarket what are your top 3 important factors that help you to decide how you choose your food and groceries? Please select in order of their importance from the list.
 Base: Total sample n=1219 adults in GB aged 16+

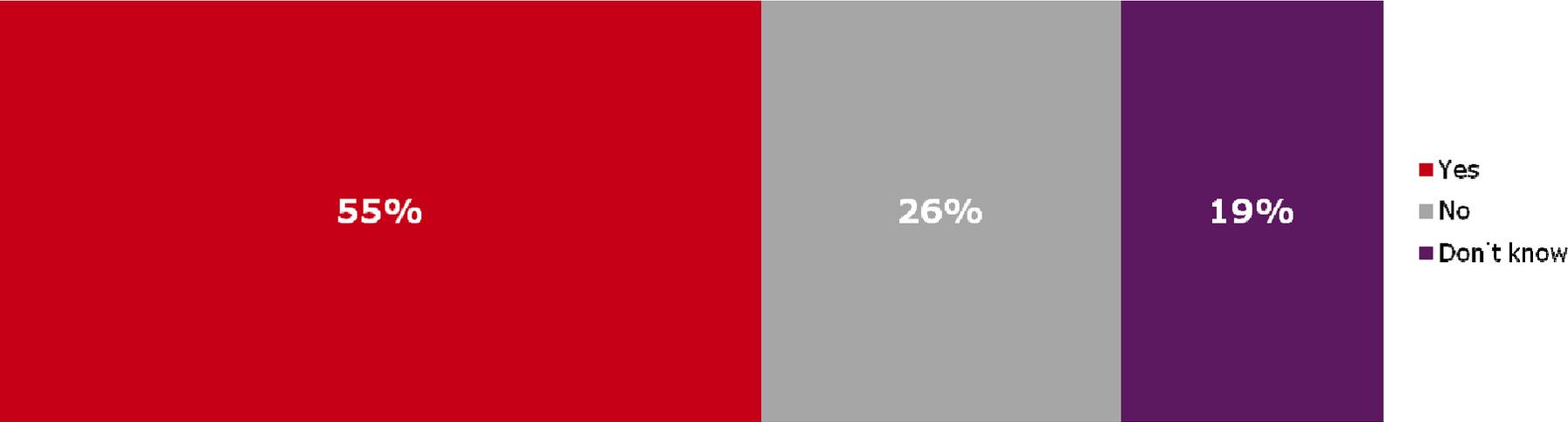


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Over one half of adults find colour coding useful in helping make a healthier choice

Colour coding calories useful in making a healthy choice? – All Adults



Q6. Is colour coding calories red, amber or green (depending on the calorie content) useful in helping you make a healthier choice when shopping for your food and groceries?
Base: n= 677 All adults that rated nutritional information on the front of the pack when shopping for food and groceries as Very (code 5) or slightly (code 4) important at Q2 / n= 199 All adults that rated nutritional information on the front of the pack when shopping for food and groceries as not at all important (code 1) or slightly unimportant (code 2)
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