

RESEARCH REPORT

Added Sugar Focus Groups

PREPARED FOR FOOD STANDARDS AUSTRALIA NEW ZEALAND
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HEARTWARD

STRATEGIC

Contents

1. Executive summary	3
2. Introduction	10
2.1 Research background	10
2.2 Research purpose and questions.....	11
3. Research approach	12
3.1 Recruitment	12
3.2 Data collection	13
3.3 Research sample.....	13
3.4 Analysis of findings.....	14
3.5 Reading this report.....	15
4. Research findings	16
4.1 Contextual findings	16
4.2 Question One – Consumer understanding of ‘sugars’ and ‘added sugars’ in the NIP	20
4.3 Question Two – Perceived value of ‘sugars’ and ‘added sugars’ information	29
4.4 Question Three – ‘Added sugars’ and single ingredient foods	35
4.5 Question Four - Perceptions of healthfulness when ‘added sugars’ is listed in the NIP	44
4.6 Question Five - Comparing foods with different sugars information.....	51
5. Discussion and limitations	56
5.1 Discussion	56
5.2 Limitations	58
6. Appendix A: Sample characteristics	59
7. Appendix B: Research materials.....	63
Recruitment specifications and screener	63
Participant information and consent form.....	70

Focus group discussion guide.....	73
Participant debrief sheet - Australia	82
Participant debrief sheet - New Zealand	83
8. Appendix C: Focus group poll results.....	84

1. Executive summary

INTRODUCTION

Food Standards Australia New Zealand (FSANZ) is considering amending the Food Standards Code to include added sugars information in the nutrition information panel (NIP) (Proposal P1058), to support consumers to make informed choices consistent with dietary guidelines. The Australian and New Zealand dietary guidelines recommend limiting intake of foods and drinks containing added sugars, and to limit fruit juice and dried fruit as they are high in sugar.

This report describes the findings and conclusions drawn from qualitative research undertaken in February and March 2024 to inform decisions regarding FSANZ's proposal. Heartward Strategic was commissioned to implement a research protocol developed by FSANZ. This included the conduct of 10 90-minute focus groups with consumers in Australia and New Zealand, with a total of 71 participants (5-8 per group). Five focus groups were conducted with consumers in each country, with two of the focus groups in each country conducted with people who have a university qualification, two conducted with people who do not have a university qualification and one group containing people with different education levels.

The overarching purpose of this research was to investigate consumer use, understanding and value of 'sugars' and 'added sugars' information on food labels and to explore consumer responses to potential formats for including 'added sugars' information in the NIP. Two definitions of 'added sugars' for the NIP were tested, which either included or excluded sugars from processed fruit products (such as puree or juice). In addition to gaining a broad understanding of how consumers perceive and use sugars information, the research aimed to investigate potential areas of confusion that were highlighted by a previous literature review of consumer evidence¹.

There were five core research questions listed below. The key findings and implications in relation to each of these questions are summarised under the subsequent headings.

1. How do consumers understand the concepts of 'sugars' and 'added sugars' when presented in a NIP?
2. Do consumers use and/or value 'sugars' information in the NIP, and would consumers use and/or value 'added sugars' information in the NIP?
3. How do consumers understand 'added sugars' when presented in the NIP of a 'single ingredient food'²?
4. How do consumers assess product healthfulness when 'added sugars' is presented in NIPs?
5. How do consumers compare foods when sugars information is presented in NIPs in different ways across different food products?

¹ FSANZ. (2022). Rapid Systematic Literature Review for P1058 – Nutrition Labelling About Added Sugars. <https://www.foodstandards.gov.au/sites/default/files/2023-12/P1058%20Literature%20Review.pdf>.

² A 'single ingredient food' is when a food ingredient that could be defined as 'added sugar' is sold as the food itself.

CONTEXTUAL FINDINGS

Key findings

Several contextually relevant themes emerged in the research that were not specific to the individual research questions, and which bear consideration in interpreting the findings of specific questions:

- Consumers had highly variable engagement with food labelling, with interest, knowledge and concerns about food products and their labels appearing to depend on their own health and nutrition knowledge, needs and goals, as well as those of members of their family/household.
- Unfamiliar foods prompted closer attention prior to their first purchase, with participants reporting being more likely to examine food labels closely if they were thinking about buying a product or brand they had never purchased before.
- The NIP was familiar to all in the research, with information contained in the NIP broadly seen to be important information. Consumers valued having the choice to consult the NIP, even if they themselves did or did not regularly do so, to make decisions when food shopping.
- Interpreting the NIP currently presents challenges for some consumers, with some in the research questioning the applicability of serving sizes to how they consume food, expressing confusion about the meaning of some macronutrients and subcategories in the layout of the NIP, being uncertain how to interpret and apply quantities in the NIP to recommended intakes, and having difficulties with its legibility.
- Consumers use information beyond the NIP to assess the healthfulness of a food product, taking into account front-of-pack claims (such as '100% natural'/'all natural', 'no added sugar'/'sugar free'), and the ingredients list, along with the grams of nutrients listed in the NIP.
- Participants paid attention to different elements of the NIP depending on their own needs, health concerns or conditions and those of their family/household members; with sugar, sodium and total energy being most commonly mentioned.

RESEARCH QUESTION ONE - CONSUMER UNDERSTANDING OF 'SUGARS' AND 'ADDED SUGARS' IN THE NIP

Key findings

The research explored how consumers understand the concepts of 'sugars' and 'added sugars' when presented in the NIP:

- To most consumers, the expression 'added sugars' signalled those sugars not naturally occurring in a food product that have been specifically added during processing. For some consumers 'added sugars' also equated to processed or refined sugars.
- In the current NIP, 'sugars', as listed under carbohydrates, clearly indicated total sugars to consumers.
- Once an 'added sugars' line was added to the NIP, some confusion arose about the meaning of added sugars and how it related to 'sugars, total'.
- As a result, some consumers added together 'sugars, total' and 'added sugars' to arrive at a larger and inaccurate number, when 'added sugars' was greater than 0g.

- Confusion also arose regarding the meaning of 'added sugars' in cases where an 'added sugars' amount was listed and the product contained a single ingredient, and/or no perceived added sugar ingredients appeared to be present in the ingredients list (e.g. added sugars arose from processed fruit). In these cases, participants displayed a tendency to question whether the label, the product itself or the manufacturer could be trusted.
- The absence of 'added sugars', or showing 0g 'added sugars', tended to be associated with the product being perceived as more 'natural', and for some consumers this was sufficient to drive purchasing decisions in favour of products with higher total sugars'.
- Further educating consumers on 'added sugars' labelling in the NIP did not reduce confusion.

Conclusions and implications

Participants in this research understood that conceptually there may be a difference between 'sugars' (as it currently appears in the NIP), and 'added sugars' (as it appeared in an example NIP). However, when considering both 'sugars' lines in the context of the example NIP, uncertainty arose about whether 'added sugars' was a component of 'sugars, total', or additional to it. This confusion increased in certain contexts, such as when the amount of added and total sugars was identical or when it appeared to contradict other contextual information such as the ingredients list. Any apparent contradictions in labelling information arising from approaches that did not align with consumers' understanding of what 'added sugars' were increased cognitive load, contributed to confusion, and often brought into question the trustworthiness of the label, the product itself, or its manufacturer.

This research showed that the addition of added sugars information was used as a proxy for 'unnatural' sugars and actually encouraged some people to choose less healthy products in terms of sugars than they might otherwise have, if added sugars information was not displayed. Caution is advised that any change to include 'added sugars' in the NIP take care not to confuse consumers as to how total sugars and added sugars relate to each other, or what constitutes a healthier product choice in terms of sugars.

RESEARCH QUESTION TWO - PERCEIVED USE AND VALUE OF 'SUGARS' AND 'ADDED SUGARS' INFORMATION

Key findings

Several themes emerged in relation to the perceived value of having 'sugars' information in the NIP, and whether consumers would use and/or value the information about 'added sugars' if it were included:

- Appreciation of sugars information in the NIP varied across participants. Consumers with particular health goals or concerns, or at a particular stage of family life, appeared to value and be more interested in sugar information in the NIP than other consumers.
- Engagement with sugars information was also reported to be situation-specific. Some participants were more likely to pay attention to sugar content when comparing sweet foods, while others reported using 'sugars' information when choosing products not typically considered sweet that might contain 'hidden' sugars.
- Some participants spontaneously voiced both an interest in knowing, and a concern about, what types and sources of sugars food products contain - information they currently identified by looking at the NIP in context with the ingredients list and front-of-pack claims. For this reason,

they appeared to value internal consistency in line with their expectations across all these packaging elements when assessing sugars information to help guide choices.

- The potential addition of ‘added sugars’ in the NIP was initially viewed positively across the focus groups, primarily because participants believed it would help them determine whether ‘processed’ sugar had been added to a product, meaning that ‘added sugars’ information would be used as proxy for whether a product was ‘natural’ or not.
- Uncertainty about the meaning of ‘added sugars’ after closely examining examples of ‘added sugars’ in the NIP tempered participant interest in the proposed addition of this information and diminished perceptions of how easy this information would be to use in practice.
- Educating consumers more on ‘added sugars’ labelling further diminished the perceived usefulness of its inclusion in the NIP.

Conclusions and implications

Across the board, sugars information was of use to consumers when comparing two similar foods expected to contain sugar, or when detecting sugars in foods not expected to contain any. Those consumers with health goals or conditions that raise interest in food sugars, valued current sugars information in the NIP more highly than their counterparts.

The inclusion of ‘added sugars’ information in the NIP, though initially anticipated to be valuable in supporting healthy food choices, was seen as less valuable by consumers when it appeared to contradict expectations of the sugar content in the product (for example, in single ingredient foods) or when it appeared inconsistent with other labelling information on the product such as the ingredient list. This may occur if sugars from processed fruit products are captured as ‘added sugars’ or if exemptions allow for different treatment across products with similar ingredients. The research findings suggest that added sugar labelling may not be able to be used effectively in these cases by some consumers who are likely to make less healthy food choices based on incorrect assumptions of what the ‘added sugars’ information means.

RESEARCH QUESTION THREE - ‘ADDED SUGARS’ AND SINGLE INGREDIENT FOODS

Key findings

The research examined how consumers understood the term ‘added sugars’ when presented in the NIP of a single ingredient food which may be included in an ‘added sugars’ definition, such as honey, 100% apple puree or 100% orange juice, with the following key findings emerging:

- When questioned on what they expected a NIP for 100% honey to show in terms of ‘added sugars’, consumers in the focus groups overwhelmingly expected to see no added sugars, or 0g.
- Confusion was caused when the single ingredient product of 100% honey had an amount for ‘added sugars’ listed in the NIP, as this contradicted expectations. Participants interpreted this to mean something had been added to the honey, leading them to question the truthfulness of the ingredients list and a ‘100% Honey’ front-of-pack claim.
- A single ingredient 100% apple puree product with ‘added sugars’ listed as 0g made more sense to participants in the focus group and was perceived to mean that the product contained naturally occurring sugars that had not been added during manufacturing. However, when shown alongside another multi-ingredient puree product which listed an amount of ‘added

sugars' in the NIP, some consumers continued to see the 100% apple puree product as healthier in terms of sugar, despite the multi-ingredient product having no ingredients that consumers perceived as being 'added sugar' and the product having less total sugar than the 100% apple puree.

- A single ingredient orange juice product was shown that did not contain a line item for added sugars. While this was consistent with consumers' expectation of 100% orange juice not containing any sugars 'added' during manufacturing, participants became unsure of their interpretation when another multiple-ingredient juice product that contained 'added sugars' as a line item in its NIP was shown.
- With further education about different ways in which 'added sugars' information could be included in the NIP for single ingredient products, consumers concluded that any single ingredient product exemptions could be confusing for members of the general public.

Conclusions and implications

Consumers had clear expectations that the NIPs for the single ingredient foods tested (i.e. honey, 100% apple puree and 100% orange juice) would list zero 'added sugars'. Confusion and uncertainty resulted from two of the options shown – when an 'added sugars' amount was listed when it was not expected to be (honey), and when the 'added sugars' line was missing altogether from the NIP while appearing on a comparable product (fruit juice products).

The option most clear to consumers, aligned with their expectations and most able to facilitate ease of comparison and trust in the label, was the inclusion of an 'added sugars' line showing 0g for the apple puree, which was perceived to mean that the product contained naturally occurring sugars that had not been added during manufacture. This suggests that 'added sugars' information will be easiest for consumers to understand and use if the labelling of 'added sugars' in the NIP matches this interpretation. However, presenting no added sugars in the NIP for single ingredient products if they are exempted from counting the sugar in the single ingredient as 'added sugars' could create misleading health perceptions when comparing such products to other non-exempt multi-ingredient products where the source of the added sugars is the same or similar.

These findings indicate that there is a relationship between consistency in applying added sugars labelling to products in the same category and the perceived value of that labelling in informing consumer food choices.

RESEARCH QUESTION FOUR - PERCEPTIONS OF HEALTHFULNESS WHEN 'ADDED SUGARS' IS IN THE NIP

Key findings

The research investigated how consumers assessed product healthfulness when 'added sugars' was presented in the NIP, including whether this new information could create misleading health perceptions for foods high in naturally occurring sugar:

- In product comparisons, accurate recognition of the product lower in sugar did not always equate to perceived healthfulness in terms of sugar specifically, or of the product overall.

- A number of consumers chose a product higher in total sugars based on information about the added sugars content in the NIP, in conjunction with the ingredient list, because of their preference for 'natural' sugars.
- Reflecting a potential approach to labelling 'added sugars' where single ingredient foods might be exempt from capturing the sugar content as 'added sugars', an apple puree product with 0g 'added sugars' was perceived by some consumers to be healthier in terms of sugar than a multi-ingredient apple, banana and oats puree with 5.7g 'added sugars' listed, even though the single ingredient product contained almost double the amount of total sugars overall. This is because 0g 'added sugars' signified to these consumers that it was more 'natural', even though they accurately recognised that higher total sugars would impact product healthfulness.
- With further education, consumers reflected on how 'added sugars' labelling had the potential to distort evaluations of the healthfulness of products.

Conclusions and implications

From the product labels tested in this research, most participants accurately used the NIP to identify which product from two of the same type contained the most total sugars. However, this did not always equate to perceived healthfulness, as total sugars were only one part of how this was determined. For some consumers, a product containing 'added sugars' in the NIP led them to conclude that it was less healthy in terms of sugar (and overall) because the sugar source was perceived as processed or not natural. This sometimes occurred despite consumers not being able to identify any sugar source they perceived as processed or 'unnatural' in the ingredients list. As a result, consumers sometimes indicated a preference for a product much higher in total sugars based on the added sugars information. This research suggests caution needs to be exercised in labelling added sugars to avoid misleading consumers, given that the strength of some consumers' preference for food products perceived as 'natural' can outweigh consideration of the quantity of sugar they contain.

RESEARCH QUESTION FIVE - COMPARING FOODS WITH DIFFERENT SUGARS INFORMATION

Key findings

The focus groups observed how consumers compare foods when sugars information is presented in NIPs in different ways across different food products:

- Consistency in labelling of similar products in terms of sugars in the NIP supported the ease of comparison between products, whereas inconsistency was a barrier to comparison.
- Confusion was caused when there was perceived inconsistency between the 'added sugars' value in the NIP and the ingredient list. That is, when the 'added sugars' line in the NIP showed an amount higher than 0g, yet there were no ingredients that consumers perceived as being added sugar in the ingredients list (i.e. fruit products were listed which were not perceived to be added sugars). Consumers became mistrusting of the product and/or manufacturer in this circumstance.
- To help them make healthy choices, some consumers called for information to increase their understanding of the sugar content of food products relative to a yardstick, such as recommended daily intake.

- The addition of 'HIGH' alongside 'sugars' in a tested NIP format was positive for some but, on balance, raised more questions about its meaning than it answered.
- Once consumers were more educated about 'added sugars' labelling and the possibility of exceptions and exemptions being applied, the proposed addition of 'added sugars' to the NIP was perceived to make product comparisons more difficult rather than easier.

Conclusions and implications

This research identified that a vital function of the NIP was to help consumers make comparisons and choose between products easily. This function was best served by consistency of sugars labelling in the NIP across similar products, while inconsistency acted as a barrier to comparison. Consistency was also crucial between the information in the NIP and the ingredients list, where confusion resulted when these two pieces of information were seen to be mismatched (for instance, if a quantity of added sugars is listed in the NIP, but no perceived added sugars appear in the ingredient list). Finally, consistency was also important if signifying whether sugar content was 'high' – other nutrients in the NIP would need to have a similar indication to avoid misleading consumers.

LIMITATIONS OF THE RESEARCH

In considering this report, please note that:

- the research was qualitative in nature, comprising a sample from a population of people who had indicated some interest in participating in market research, and is designed to understand individual response patterns and decision making
- the research has identified a range of views on the questions of interest but is not intended to be relied upon to indicate the extent to which each of these views is held or to be generalised to the population. However, the consistency of findings across the focus groups suggests that the understandings and views outlined in this report are widely held
- due to the number of focus groups and sampling factors, the demographic and psychographic characteristics of interest were not perfectly matched across the samples, so apparent differences between Australia and New Zealand may have been impacted by this
- the online research method conducted entirely in English is likely to have precluded people with technological disadvantage or with lower English proficiency from inclusion in the research.

2. Introduction

2.1 RESEARCH BACKGROUND

Food Standards Australia New Zealand (FSANZ) is an independent statutory authority responsible for developing and maintaining food standards in the Australia New Zealand Food Standards Code (the Code) that protect public health and safety throughout Australia and New Zealand.

FSANZ is considering amending the Code to include added sugars information in the nutrition information panel (NIP) under Proposal P1058 (Nutrition labelling about added sugars) to support consumers to make informed choices consistent with dietary guidelines. The Code currently requires the total amount of 'sugars' to be declared in the NIP but does not require 'added sugars' to be listed.

The Australian and New Zealand Dietary Guidelines recommend limiting intake of foods and drinks containing 'added sugars', however, do not define this term. The Australian guidelines also recommend limiting the amount of fruit juice and dried fruit consumed noting their high energy density. Similarly, the New Zealand guidelines recommend limiting dried fruit and to choose water rather than fruit juice, due to their high sugar content.

To support Proposal P1058, FSANZ has undertaken a rapid review of the literature relating to consumer understanding of 'added sugars' (or similar terms) and consumer perceptions of 'added sugars' in the NIP (or international equivalents)³. This literature review suggests that:

- consumers have a broad, literal understanding of added sugars, impacted by education
- healthiness assessments may often be made on the basis of perceived degree of sugar processing
- consumers may not always view 'natural' sugars as 'added'
- some consumers may not understand 'no added sugar' claims
- understanding of the presence of added sugars in products varies based on product type
- added sugars information in NIPs helps consumers identify added sugar, decreases perceived healthiness, and is unlikely to interfere with the ability to determine overall product healthiness
- consumers may perceive 'added sugars' to be additional to, rather than a component of 'sugars'
- it is unclear whether consumers will focus more on 'added' or 'total' sugars if both are included.

While these findings are based on a solid number of recent, relevant studies, the rapid review noted that most studies generated quantitative data only, and few studies provided data specific to Australia or New Zealand, limiting the generalisability of results.

³ FSANZ. (2022). Rapid Systematic Literature Review for P1058 – Nutrition Labelling About Added Sugars. <https://www.foodstandards.gov.au/sites/default/files/2023-12/P1058%20Literature%20Review.pdf>

To fill this gap in understanding and to further support Proposal P1058, FSANZ commissioned Heartward Strategic, a social research agency, to conduct qualitative research. A qualitative research design was utilised to enable an in-depth exploration of some of the primarily quantitative findings raised by the previous literature review. While qualitative research cannot identify the extent to which views are prevalent in the broader population, the consistency of findings across the focus groups suggests that the understandings and views outlined in this report are widely held.

2.2 RESEARCH PURPOSE AND QUESTIONS

The overarching purpose of this research was to investigate Australian and New Zealand consumer use, understanding and value of 'sugars' and 'added sugars' information on food labels, and to explore consumer responses to potential formats for including 'added sugars' information in the NIP.

In addition to gaining a broad understanding of how consumers perceive and use sugars information, the research aimed to investigate potential areas of confusion that were highlighted by the previous FSANZ literature review. As the Australian and New Zealand dietary guidelines recommend to limit added sugars and food naturally high in sugar, two definitions of 'added sugars' for labelling in the NIP were tested which either included or excluded sugars from processed fruit products (such as puree or juice).

This purpose was underpinned by five specific research questions:

1. *How do consumers understand the concepts of 'sugars' and 'added sugars' when presented in a NIP?*
 - What do consumers understand to be the difference between these concepts?
 - Do consumers understand that 'added sugars' are a component of 'sugars', i.e. 'sugars, total'?
2. *Do consumers use and/or value 'sugars' information in the NIP, and would consumers use and/or value 'added sugars' information in the NIP?*
 - Are there specific contexts when the information is used/valued?
 - Would use/value differ depending on what is defined as 'added sugars'?
3. *How do consumers understand 'added sugars' when presented in the NIP of a 'single ingredient food'⁴?*
4. *How do consumers assess product healthfulness when 'added sugars' is presented in NIPs?*
 - What information do consumers use to assess product healthfulness when 'added sugars' are presented in NIPs?
 - Does presenting no or low levels of 'added sugars' in the NIP create misleading health perceptions for foods high in inherent/naturally occurring sugar, including:
 - Misleading health perceptions regarding sugar content, and/or
 - Misleading health perceptions of the product as a whole?
5. *How do consumers compare foods when sugars information is presented in NIPs in different ways across different food products?*

⁴ A 'single ingredient food' is when a food ingredient that could be defined as 'added sugar' is sold as the food itself.

3. Research approach

The broad study design was developed by FSANZ staff, with input from an external expert peer reviewer from FSANZ's Social Science and Economics Advisory Group (Professor Rachel Ankeny). Heartward Strategic provided two rounds of detailed advice and revisions to the research protocol, including the design and development of supplementary materials such as polls and stimulus packs (see Appendix B).

The study protocol stipulated focus groups as the data collection method to enable rich qualitative data on the research questions to be collected from consumers. The research design had the following characteristics:

- Ten online focus groups of 90 minutes' duration were conducted with 5–8 participants attending each group (average 7.1, 71 total).
- Participants were included in the study if they were over 18 years of age, a food shopper in their household and (at least rarely) used nutrition information on food labelling.
- To minimise possible bias, those working in a related industry (e.g. food industries, food policy or food-related public health advocacy) were excluded.
- Half of the focus groups were held with Australian consumers and half with New Zealand consumers, yielding total samples of:
 - Australia, n=38 participants
 - New Zealand, n=33 participants.
- Focus groups were further segmented according to level of education.

The first focus group in each jurisdiction was conducted as a 'pre-test', to test and refine the focus group design and delivery. Based on the pre-test outcomes, the discussion approach was amended to include an additional question to further debrief consumers on the purpose of the research to reduce any confusion created through participation and seek final views on including added sugars in the NIP based on this further information. Minor changes were also made to the wording of poll questions used in the groups. The following four focus groups in each jurisdiction constituted the 'main study'.

The research was conducted in accordance with the National Health and Medical Research Council's Australian Code for the Responsible Conduct of Research and the Guide to Managing and Investigating Potential Breaches of the Australian Code for the Responsible Conduct of Research.

3.1 RECRUITMENT

Recruitment of participants was undertaken using consumer panels via Australian recruitment specialists CNRSTONE, in partnership with Prime Research (for New Zealand). Recruitment utilised a screener questionnaire which collected participant information to facilitate the selection of an appropriate sample and to enable a detailed description of participants.

Panel members were initially invited to participate via email (pre-targeted based on known socio-demographic characteristics) and then were fully screened via phone by a small recruitment team. Participants received an incentive of \$100AU for participation in the research.

Informed consent to participate was collected at the screening stage, and again verbally prior to the commencement of each focus group (see Appendix B for the participant information and consent form).

3.2 DATA COLLECTION

The focus groups were held on the Zoom video-conferencing platform, enabling the sharing of stimulus materials, running of polls, viewing by FSANZ staff and recording of sessions. Focus groups were hosted on City Group Rooms' (CGR) secure, cloud provider box.com, and participants were onboarded by CGR staff to check their identification and ensure their audio-visual set-up was functional.

Conduct of the focus groups was directed by a semi-structured discussion guide. In line with the research objectives, the discussion flow was designed to gain a broad understanding of how Australian and New Zealand consumers perceive and use 'sugars' and 'added sugars' information, and to investigate specific hypotheses around potential areas of confusion. To ensure testing of specific areas of confusion did not bias consumer perceptions of added sugar labelling, broad information on consumer use and understanding was collected prior to any specific hypothesis testing and was re-visited at the end of the focus group to see if perspectives had changed.

Each focus group was exposed to a series of images provided by FSANZ showing the current NIP, a NIP with 'added sugars' included, and a number of food product package mock-ups with NIPs showing added sugars under different scenarios (see Appendix B for all research materials). Where participants were asked to compare two similar products, the order of showing each product was rotated at successive focus groups to minimise order bias. A series of polls were also utilised in each group to collect individual responses prior to discussing specific concepts as a group (see Appendix C for all poll results).

Each group concluded with a participant debriefing in which the research context was explained, enabling participants to provide fully informed final comments and allowing the opportunity to seek clarification or ask final questions. A debriefing sheet produced by FSANZ was also made available in PDF format, which contained further details about the research, and links to relevant information and support sources.

Each of the ten focus groups was conducted by a senior, experienced Heartward Strategic social researcher between February 27 and March 21, 2024. The focus groups were audio-recorded and digitally transcribed. Field notes were also taken by the facilitator or the researcher observing.

3.3 RESEARCH SAMPLE

Two of the focus groups held in each country included people who were actively completing or had completed university-based higher education (i.e. an undergraduate degree or postgraduate degree), two included those who had not completed this level of higher education (i.e. they had completed up to high school or a vocational/trade qualification), and one group included people with a mix of education levels. This group structure aimed to provide insight into whether those with lower levels of education would find it more difficult to accurately understand added sugar labelling.

The structure of the ten (10) focus groups is shown in Table 1.

Table 1

<i>Number of focus groups in each cell</i>	Australian	New Zealand	TOTAL
Highest education level			
University education (undergraduate or postgraduate university degree)	2	2	4
No university education (high school/ vocational/ trade qualification)	2	2	4
Mix of education levels	1	1	2
TOTAL	5	5	10

The primary focus group segmentation within each country was based on education level, but the focus groups also included a diversity of consumers across the whole sample. A detailed breakdown of the sample characteristics achieved across the focus groups in each country (in terms of age, gender, location, education level, ethnicity, working status, household composition, food shopper status, usage of nutrition information on food labels, dietary influences, and attitudes towards sugar) is included in Appendix A.

3.4 ANALYSIS OF FINDINGS

Data analysis was conducted by the Heartward Strategic social researchers who facilitated the focus groups. Reflexive thematic analysis was used to systematically and robustly explore the dataset, from which a pattern-based analysis was produced. This process of qualitative analysis reflects the intersection of the researcher, the dataset, and the interpretive context.

The analysis process involved, in the following order:

- Immersion in and review of data across multiple formats including fieldwork notes taken at the time and shortly after each focus group, audio-recordings and transcripts.
- Generation of initial observations by each member of the team individually, based on the research questions.
- Generation and refinement of observations across the sample, emerging from a group analysis session, to triangulate and workshop individual observations and produce a set of evidence-based research findings.
- Referring back to the raw data (poll data, recordings) to test and refine the findings and identify verbatim quotes to illustrate them.
- Finally, to support writing of the Discussion section of this report, the team explored and interpreted patterns across datasets to illustrate the relationships between key findings and support recommendations on how to apply them in decision-making.

3.5 READING THIS REPORT

Section 4. Research Findings initially details observations that provide important contextual information to support the interpretation of consumer perceptions and responses, and subsequently details findings pertaining specifically to the five research questions.

Section 5 Discussion draws together these findings to provide a framework from which to understand and interpret the findings.

Observations about differences in findings based on education level or between participants in Australia and New Zealand provided in this report should be treated with caution, due to the small sample sizes and some demographic differences between the samples from each country.

4. Research findings

4.1 CONTEXTUAL FINDINGS

Consumers had highly variable engagement with food labelling

The participants in this research varied greatly in terms of their interest, knowledge and concerns in relation to food and food labelling. Those who tended to have higher levels of both interest and knowledge included:

- consumers who had, or were shopping for others with, a health concern or risk factors for conditions such as diabetes or high blood pressure and had been advised by a health professional to read product labels carefully and make considered choices around food
- consumers who had, or were shopping for others with, food allergies or intolerances and needed to avoid certain ingredients such as gluten, nuts, or dairy
- parents of infants and young children who were often trying to avoid purchasing products with artificial colours and flavours, preservatives, and high levels of sugar and salt
- those who were pursuing certain health and fitness goals, such as to lose weight or build muscle
- consumers following specific diets (specific mentions included vegetarian or vegan diets, ketogenic and 'low carb' diets, and the carnivore diet).

"I was following a Keto lifestyle for a while, and it's specifically sugars and carbohydrates that you have to be very conscious of. There's certain products that have ingredients in them that actually you have to count as carbohydrate but they're left off the nutrition information panels. You kind of have to search through all the information on the packets to see if these ingredients are mentioned."

NEW ZEALAND, NO UNIVERSITY EDUCATION, WOMAN

Unfamiliar foods prompted closer attention prior to first purchase

Participants were more likely to examine food labels closely if they were thinking about buying a product or brand they had never purchased before (for example, if a product was new, on sale, or had been recommended to them by a friend/family member), using both the NIP and ingredients list to compare these with brands they habitually purchase. Conversely, they were far less likely to read the NIP or ingredients list if they were purchasing brands they had purchased or consumed many times. The exception might be if they were buying the product for someone with specific food needs, such as an allergy, and needed to double-check the ingredients.

"Probably look at the product, the labels, a bit more when it's something new that I'm buying."

AUSTRALIA, NO UNIVERSITY EDUCATION, MAN

The Nutrition Information Panel was familiar and valued

To prompt discussion about nutrition information on food labelling and to provide a baseline from which consumers could compare later examples during the focus group, an example of the current NIP was shown (Figure 1).

Figure 1

NUTRITION INFORMATION		
Servings per package: 6.3		Serving size: 160g
	Average Quantity per Serving	Average Quantity per 100g
Energy	571kJ	357kJ
Protein	7.0g	4.4g
Fat, total	3.0g	1.9g
- saturated	1.9g	1.2g
Carbohydrate	20.0g	12.5g
- sugars	19.4g	12.2g
Sodium	90mg	56mg

As food shoppers who look at nutritional information on food packaging or containers when shopping at least 'rarely', all of the participants in this study were aware of the NIP. They varied significantly, however, in the extent and frequency they reported using the NIP, as well as in their apparent understanding of the information it contains.

When considering the NIP in the focus groups, nutritional information of the kind contained in the NIP was broadly seen to be important information – consumers valued having the choice to consult the NIP, even if they themselves rarely did so, to make decisions when food shopping.

There were a range of ways that consumers typically used the NIP, including to check a particular product in relation to:

- the quantity of a nutrient per serving from the serving size column (e.g. x grams of sodium)
- the quantity of a nutrient in percentage terms using the per 100 grams column (e.g. 25% sugar)
- relativities between the nutrients (e.g. is it protein-rich compared with the fat content?)
- whether the nutrient values are within an expected range (e.g. low expected sugars in savoury foods)
- how it compares to another substitutable product using the 100 grams column.

The NIP currently presents some challenges

In its present form, before any change related to ‘added sugars’, some consumers in this research faced challenges using and interpreting the information in the NIP, specifically:

- *knowledge gaps* – gaps in understanding of specific macronutrients shown in the NIP, such as not knowing what else comprises carbohydrates, apart from sugars
- *confusion* – about the meaning of the information based on the layout, including which nutrients are sub-categories and which are added to make totals
- *uncertainty* – a lack of clarity about how many grams of a nutrient (e.g. sugar or salt) per serve/100g is considered high or low, or how it relates to the recommended dietary intake
- *relevance* – suggested serving sizes being of limited relevance and/or leading to confusion, since these were not always perceived to align with how people typically consume the product
- *legibility* – the font size being difficult to read or even impossible without reading glasses for some (particularly older) consumers, presenting a practical issue of needing to take glasses shopping and repeatedly take them on and off to navigate through a store.

“Does the average person know how much sugar is in the average daily allowance. They probably don’t.”

AUSTRALIA, UNIVERSITY EDUCATION, MAN

“.. you have to have like total for the type of carbohydrate, but then broken down into specifics. I mean, there’s nothing there for fibre, for example. There’s nothing there, for you know good things that could actually be in it apart from protein.”

AUSTRALIA, UNIVERSITY EDUCATION, WOMAN

“The average quantity per serving is all very well but if it’s a very small serving size it’s kind of not relevant.”

NEW ZEALAND, NO UNIVERSITY EDUCATION, WOMAN

“As my eyes are getting worse, you know, I really do struggle [with the size of the font in the NIP].”

NEW ZEALAND, NO UNIVERSITY EDUCATION, MAN

Consumers go beyond the NIP to assess healthfulness

Consumers did not consider the NIP alone. To assess the healthfulness of a product, at times, consumers looked at the following food labelling information in addition to the NIP:

- front-of-pack claims, such as ‘100% natural’/‘all natural’, ‘no added sugar’/‘sugar free’
- the ingredients list.

To determine how healthy a food product is, consumers reported combining these information elements with the grams of nutrients listed in the NIP, to provide a more complete picture.

Consideration of nutrition information depends on health concerns or conditions

Nutritional information on the label that consumers reported referring to when making food purchase decisions included:

- sugar content (focussed on the quantity or proportion of sugar contained in the food, typically seeking products that were low in sugar overall, lower than they might expect for that type of food, or lower compared to other brands, flavours or foods being considered)
- salt or sodium content
- energy/calorie content
- fat content (with those concerned about fat content generally trying to steer away from products containing saturated and trans fats)
- protein content (with those trying to lose weight or feed hungry teenagers often looking for products with higher protein levels because they felt protein would help keep them feeling full)
- artificial additives (such as colours, flavours, msg, preservatives, artificial sweeteners or any ingredients that include numbers or start with an 'e')
- potential allergens (such as gluten, dairy or nuts)
- the product health star rating (with some using this as a guide for buying the healthiest brand in a product category)
- where the ingredients come from and/or where the product is manufactured (this was important to some for a range of reasons, including concerns about the quality of some imported products)
- genetically modified ingredients
- whether or not the ingredients are Halal
- front-of-pack claims such as '100% natural' or 'no added sugar'.

"Especially when we're choosing between products we tend to go for the ones with the least amount of sugar and least amount of salt."

NEW ZEALAND, UNIVERSITY EDUCATION, MAN

"I look at sodium because I have kidney disease. I also look protein because I want to build muscle. I prefer to eat high protein foods."

NEW ZEALAND, UNIVERSITY EDUCATION, MAN

"I like to know that it's at least you know 60-70% made here, just because the food standards are a lot stronger in Australia than in certain countries around the world."

AUSTRALIA, UNIVERSITY EDUCATION, WOMAN *"I generally look at the labels also for the ingredients and also the calorie intake. But most of the time it's also for sugars because some things have hidden sugars when you wouldn't think there is."*

NEW ZEALAND, UNIVERSITY EDUCATION, MAN

4.2 QUESTION ONE - CONSUMER UNDERSTANDING OF 'SUGARS' AND 'ADDED SUGARS' IN THE NIP

This section describes how consumers understand the concepts of 'sugars' and 'added sugars' when presented in the NIP, including:

- What consumers understand to be the difference between these concepts
- Whether consumers understand that 'added sugars' are a component of 'sugars, total'.

Participants in this research understood conceptually that there may be a difference between 'sugars' (as it currently appears in the NIP), and 'added sugars' (as it appeared in an example NIP they viewed). However, when considering both 'sugars' lines in the context of the example NIP, uncertainty arose about whether 'added sugars' was a component of 'sugars, total', or additional to it. This confusion increased in certain contexts, such as when the amount of added and total sugars was identical or when it appeared to contradict other contextual information such as the ingredients list. Any apparent contradictions in labelling information arising from approaches that did not align with consumers' understanding of what 'added sugars' were increased cognitive load, contributed to confusion, and often brought into question the trustworthiness of the label, the product itself, or its manufacturer. The added sugars information was used as a proxy for 'unnatural' and actually encouraged some people to choose less healthy products in terms of sugars than they might otherwise have, if the added sugars information was not displayed.

To most consumers 'added sugars' signalled added processed sugars

To capture their interpretation of what 'added sugars' would mean if they saw it in the NIP, participants responded to a poll question that asked what they thought 'added sugars' appearing in a NIP would mean and then discussed this topic as a group. Their responses to the poll showed that the majority of participants across all of the focus groups (85% of 71 participants⁵) assumed that if 'added sugars' was listed in the NIP, it would communicate one or both of two key messages about the product:

- *sugar has been added* – from the expression 'added sugars' consumers deduced that the product had been made through a manufacturing process, and that sugar had been added to the product during this to improve its sweetness and/or flavour
- *the added sugar is processed* – consumers also assumed that the added sugars contained in the product were not natural, but the product contained 'processed' sugars such as refined white sugar, or artificial sweeteners (due to an association between the terms 'added' and 'food additives', such as artificial flavours).

⁵ The remaining 15% of the 71 participants gave a response that did not directly answer this question, indicated they did not know, or did not provide a response. See Appendix C for the full list of open-ended responses to this question.

"I would assume it meant extra sugar that had been added, so not naturally occurring."

AUSTRALIA, UNIVERSITY EDUCATION, WOMAN

"Added sugars would mean these sugars are not naturally from the product itself but have been added to enhance/sweeten the product."

NEW ZEALAND, UNIVERSITY EDUCATION, MAN

"I would assume they were more processed sugars"

NEW ZEALAND, UNIVERSITY EDUCATION, WOMAN

"I would think added sugars mean sugar added on top of whatever natural sugar already exists in the product."

AUSTRALIA, NO UNIVERSITY EDUCATION, WOMAN

"Added artificial sugar or more sugar than was natural in the product."

NEW ZEALAND, NO UNIVERSITY EDUCATION, MAN

"Extra natural and processed sugars are added."

AUSTRALIA, NO UNIVERSITY EDUCATION, WOMAN

"Extra sugar added on top of the sugar content that is already in a product."

AUSTRALIA, NO UNIVERSITY EDUCATION, MAN

For most, 'sugars, total' in example NIP equated to 'sugars' in current NIP

After spontaneous responses to the meaning of 'added sugars' were collected, participants were shown an example NIP with a new 'added sugars' line (Figure 2).

Figure 2

NUTRITION INFORMATION		
Servings per package: 6.3 Serving size: 160g		
	Average Quantity per Serving	Average Quantity per 100g
Energy	571kj	357kj
Protein	7.0g	4.4g
Fat, total	3.0g	1.9g
- saturated	1.9g	1.2g
Carbohydrate	20.0g	12.5g
- sugars, total	19.4g	12.2g
- added sugars	10.9g	6.8g
Sodium	90mg	56mg

Discussion around the presentation of sugars in the example NIP revealed that most participants assumed the term ‘sugars’ in the current NIP refers to the total sugar content in the product including:

- sugars that naturally occur in any of the product’s ingredients (such as honey or dried fruit), plus
- any processed or refined sugar that has been added as part of the manufacturing process.

Most participants appeared to interpret the term ‘sugars, total’ in the example NIP in the same way as the term ‘sugars’ in the current NIP. The idea that ‘added sugars’ form part of ‘total sugars’ in the example NIP, in the same way that ‘saturated’ fat is a part of ‘Fat, total’ in the current (and example) NIP, appeared to be initially understood by most.

“Total sugars is the total of all sugars, and the added sugar is the extra that they add in.”

AUSTRALIA, NO UNIVERSITY EDUCATION, MAN

“So, the natural sugars that are in the product, plus the ‘added sugars’ that have been added into it. And then that makes the ‘sugars total’.”

NEW ZEALAND, UNIVERSITY EDUCATION, WOMAN

Including ‘added sugars’ in the NIP led some to overestimate sugar content

Some participants, however, were clearly confused with the presentation of ‘added sugars’ listed immediately below ‘sugars, total’ and ‘Carbohydrate’ in the example NIP. The main confusion was whether ‘added sugars’ was part of ‘sugars, total’, or whether they would need to add both amounts together to calculate the total amount of sugar in the product.

"I would have assumed that's part of the carbohydrates... like sugars total and added sugars would add up to the carbohydrate reading."

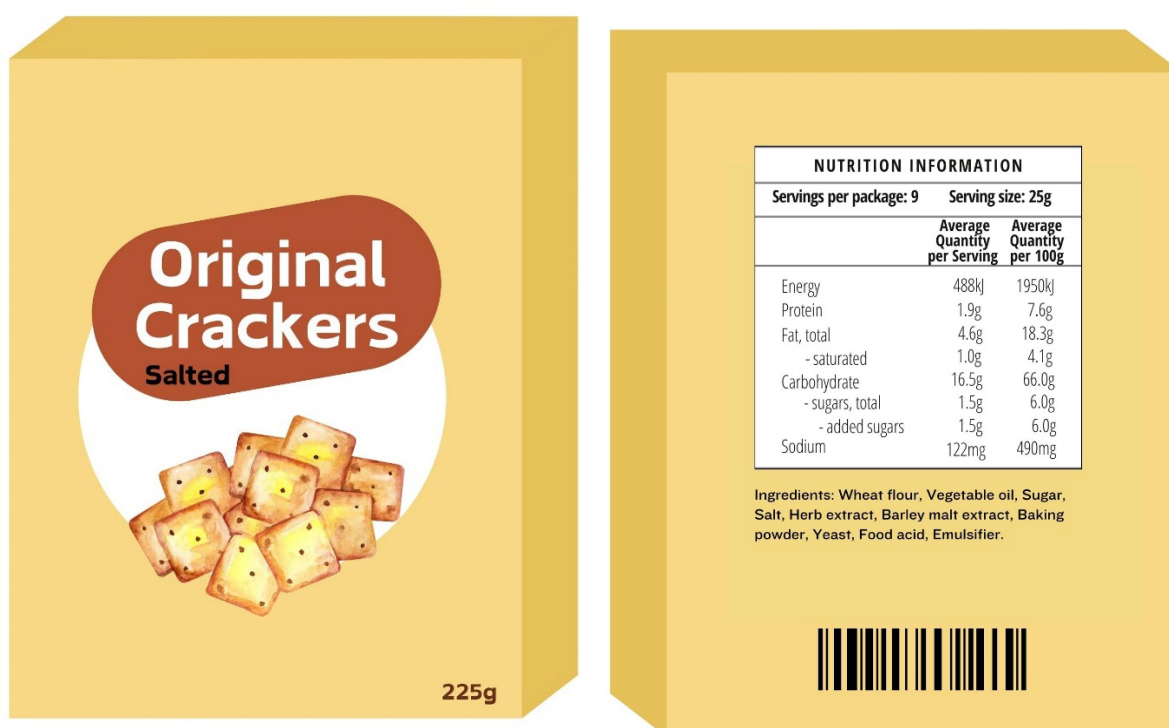
AUSTRALIA, UNIVERSITY EDUCATION, WOMAN

"To me this is saying this is extra on top of the total."

AUSTRALIA, NO UNIVERSITY EDUCATION, MAN

Confusion appeared to be even greater when participants were shown an example where the number of grams for 'sugars, total' and 'added sugars' were exactly the same, as was the case in an example crackers product shown during the focus groups (Figure 3).

Figure 3



This confusion was demonstrated by some participants' responses to a poll question about this box of crackers, which asked them to calculate how many grams of sugar is in one serving. As shown in Figure 3, the NIP on this product listed both the 'sugars, total' and 'added sugars' as 1.5g per serving. Selecting from a list of possible responses, the majority (72% of the 71 research participants) selected the 1.5g response. The next largest group of participants (14%) selected a response of 3g, indicating in subsequent conversation that they had added the grams of 'added sugars' and 'total sugars' together to arrive at this response. Of the remaining participants, 3% selected a response of 6g, 3% selected a response of 16.5g and 8% did not give a response.

"I found it quite confusing. I was mistaken in adding the numbers up and making 3g – there's too much information...It's got to be simplified. Having added sugar and total sugar is starting to complicate the whole thing. We need to be able to absorb the information quickly so we can make a decision."

NEW ZEALAND, NO UNIVERSITY EDUCATION, MAN

"It becomes more confusing if those added sugars are at 1.5 grams and the total is 1.5 grams. Then why does it need to be adding sugars? It's a bit confusing."

AUSTRALIA, NO UNIVERSITY EDUCATION, WOMAN

Misalignment between labelling and consumers' understanding of 'added sugars' led to confusion and reduced trust

Consumers also became confused when looking at examples where an 'added sugars' amount was listed in the NIP but there were no perceived added sugar ingredients in the ingredient list, for example, single ingredient foods such as a jar of 100% honey, or products where only processed fruit products contributed to the 'added sugars' amount in the NIP. In these cases, consumers generally assumed that the naturally occurring sugars from honey or processed fruits in the product would count towards the total sugar content but would not count as an added sugar. If 'added sugars' were present in the NIP, consumers looked to the ingredients list to try to ascertain the source and were confused if an apparent 'added sugar' ingredient wasn't listed there (e.g. if fruit products were listed but not a 'processed' sugar-type ingredient).

If an amount of 'added sugars' was listed in the NIP, but there was no ingredient consumers understood to be 'added sugar' in the ingredients list, then consumers typically questioned the accuracy of the ingredients list, any conflicting front-of-pack claims, and the NIP. This negatively impacted consumers' perceptions of the manufacturer as transparent and trustworthy, as well as the perceived quality of the product itself. Many came away questioning their understanding of what 'added sugars' means.

"It looks misleading because it says, ingredients, honey, 100% honey. And then it's saying, 'Oh, by the way, we've added some sugar'."

AUSTRALIA, NO UNIVERSITY EDUCATION, MAN

"I think they are deceiving me and adding something that isn't what I want... straight away I'll be suspicious if I saw that [ingredient list does not match NIP]."

AUSTRALIA, UNIVERSITY EDUCATION, WOMAN

"Like, what does added actually mean then? Because that [honey example] to me would seem like it is not...like that is the confusing part."

NEW ZEALAND, NO UNIVERSITY EDUCATION, WOMAN

Particularly confusing to consumers was the label for a mixed fruit puree product (see Figure 4). This consisted of a front of pack image, which included a made-up brand and product name along with the weight of the product, and a back-of-pack image which included an ingredients list, barcode and NIP, including values for 'sugars, total' and 'added sugars'. Reflecting a potential option for defining 'added sugars' for the NIP, in this example the 'added sugars' value included sugars from the fruit puree ingredients, while 'sugars, total' included sugars from the fruit purees and other ingredients (e.g. oats). The high ratio of 'added sugars' to 'sugars, total' on this pack suggested to consumers that a perceived added sugar ingredient should appear in the ingredients list. When this did not match their expectations, it brought into question the definition of 'added sugars', the accuracy of the ingredients list and the healthfulness and quality of the product overall.

PERSON 1 "I don't know where the other added parts of the sugar come from?"

PERSON 2 "I think it's [the added sugar] cinnamon."

AUSTRALIA, NO UNIVERSITY EDUCATION

"So even if they're adding more banana, they're not probably adding more natural banana. They could be adding banana flavouring, or something like that."

AUSTRALIA, NO UNIVERSITY EDUCATION, WOMAN

"I still think it leaves us wondering, like, where has the added sugar come from? Like we're guessing where it might have come from from the ingredients list, or have they just not put it in the ingredients? That's why I'm still confused about it."

NEW ZEALAND, UNIVERSITY EDUCATION, WOMAN

Figure 4



Further educating consumers on ‘added sugars’ labelling in the NIP did not reduce confusion

At the end of each of the main study focus groups, participants were provided with further information about the purpose of the research and the potential approaches for including added sugars information in the NIP. Following this information, participants reiterated their views that the treatment of added sugars should align with their initial assumptions – i.e. that naturally occurring sugars are not ‘added sugars’ and that fruit sugars are unlikely to be assumed by consumers to be included if an ‘added sugars’ amount is presented in a NIP. So, while further education did lead some participants to a greater appreciation of the complexities at play, overall it did not reduce consumer confusion and indeed generated concern that other consumers might share this confusion.

"It's really tricky... I can see where a lot of confusion can come around from reading the labels."

NEW ZEALAND, UNIVERSITY EDUCATION, MAN

"What if it's implemented? I feel like I will be far more confused than I may have been before this session."

NEW ZEALAND, NO UNIVERSITY EDUCATION, WOMAN

"I think it's gonna get confusing between what people think of as an added sugar."

AUSTRALIA, UNIVERSITY EDUCATION, MAN

DIFFERENCES BY EDUCATION LEVEL

A poll of the 38 participants with a university-level qualification and 33 participants without a university qualification taken during the groups revealed some potential differences by education level in assumptions about what 'added sugars' in the NIP would mean. The majority of participants with a university-level qualification (84%) indicated that 'added sugars' would mean sugar of some type that has been added to the product during manufacturing, and/or above that occurring naturally in the core ingredients of the product. Some participants with a university-level qualification (29%) indicated that the added sugar would be a 'processed' or 'artificial' type of sugar. Among participants without a university qualification, 58% (of 33 participants) interpreted 'added sugars' to mean sugar had been added to a product during manufacturing and/or above that occurring naturally in the core ingredients of the product and 39% indicated that 'added sugars' would mean 'processed' or 'artificial' types of sugar had been added to the product.

Three participants with a university-level qualification (5%) did not give an answer this poll question or their answer was not relevant to the question, while seven participants without a university-level education (18%) either did not give a response, gave a response that indicated confusion or did not directly answer the question in their response.

There were also apparent differences by education level in the number of participants who added together the 'sugars, total' and 'added sugars' amounts in a poll asking them how many grams of sugar was in one serve of a crackers product they were shown. Twenty-one percent (21%) of participants without a university-level qualification and 8% of participants with a university education added these figures together to arrive at their response.

COUNTRY DIFFERENCES

Looking at the poll results by country, the 38 participants in the research from Australia and the 33 participants from New Zealand were fairly aligned in their assumptions about what the term 'added sugars' would mean if it were included in the NIP. Among participants in Australia, 74% mentioned that 'added sugars' would mean sugar of some type that has been added to the product during manufacturing, and/or above that occurring naturally in the core ingredients of the product, 29% mentioned that the added sugar would be a 'processed' or 'artificial' type of sugar and 11% either did not give a response, gave a response that indicated confusion or that did not directly answer this question.

Among participants in New Zealand, the comparable proportions giving each of these types of responses was 70%, 39% and 12% respectively.

When the crackers example was shown during focus groups, and participants were polled on how many grams of sugar was in one serve of the product shown, participants in Australia appeared slightly more likely than those in New Zealand to give a response other than 1.5g. In total, 29% of participants from Australia gave a response other than 1.5g to this question, compared with only 9% of participants from New Zealand. Among Australian participants, 21% selected a response that added together the 'sugars, total' and 'added sugars' amounts, 5% cited the total carbohydrate amount, and 3% (one participant) gave a response from the per 100g column. This is compared to 6% from New Zealand who added the 'sugars, total' and 'added sugars' amounts, and 3% (one participant) who gave a response from the per 100g column.

As noted in the limitations, focus group samples are not large and nationally representative and thus proportions relating to education and country cannot be generalised to the broader population.

4.3 QUESTION TWO – PERCEIVED VALUE OF ‘SUGARS’ AND ‘ADDED SUGARS’ INFORMATION

This section describes the use and perceived value of having ‘sugars’ information in the NIP, and how consumers would use and value the information about ‘added sugars’, including:

- whether there are specific contexts when this information would be valued or used, and
- usefulness of this information depending on what is defined as ‘added sugars’.

Across the board, sugars information was considered to be of use when comparing two similar foods expected to contain sugar, or when detecting sugars in foods not expected to contain any. Those consumers with health goals or conditions that pique interest in food sugars, valued current sugars information in the NIP more highly than their counterparts.

The inclusion of ‘added sugars’ information in the NIP, though initially anticipated to be valuable in supporting healthy food choices, was seen as less valuable to consumers when it appeared to contradict expectations of the sugar content in the product (for example in single ingredient foods), or appeared inconsistent with other labelling information on the product such as the ingredients list as may occur under an ‘added sugars’ definition which captures processed fruit and vegetable products which are not typically perceived to be ‘added sugars’.

Appreciation of sugars information in the NIP varied

Consumers with particular health goals or concerns or at a particular stage of family life tended to value and be more interested in sugar information in the NIP than other consumers, specifically:

- people with diabetes or living with someone with diabetes, noting that most had been instructed by their health practitioners to focus on the total sugar content of products, rather than the type of sugar
- parents of infants and small children who generally tried to avoid processed products containing sugars, in favour of less processed, more natural foods
- consumers who are health-focussed or following a specific diet to lose weight or address health concerns (such as a ketogenic or low carb diet).

“For me it’s just pure lifestyle reasons. Yeah, I’m trying to lose weight and to have a child. For fertility reasons it’s not recommended to have a high sugar diet. Also, there’s a lot of added sugar in a lot of products and also what I deemed as being more processed food as opposed to eating more whole food, so it’s probably about understanding if it’s natural sugar or added sugar as well.”

NEW ZEALAND, UNIVERSITY EDUCATION, WOMAN

“I did have diabetes a while ago, and that’s number 2. So, I’ve got able to sort of clean that up quite a lot, and now that I’m sort of in a much better state in that regards, I still compare sugars with all items that I buy, just to make sure that I’m not having too many sugars, and that’s the reason why I look at it.”

AUSTRALIA, NO UNIVERSITY EDUCATION, MAN

“My brother and my mother have diabetes. So yeah, we really look after how much sugar we consume.”

NEW ZEALAND, UNIVERSITY EDUCATION, MAN

Engagement with sugars information was also situation-specific

According to some consumers, their focus on sugars depended upon the type of food being purchased. Some were more likely to look at information about sugars on the pack when comparing desserts and other sweet treats to help them find an option with the least amount of sugar overall. However, others did not bother to look when buying treats that they only consume occasionally; instead, they were more likely to double-check the NIP and ingredients list on foods that make claims of being healthy, including savoury products that can often include ‘hidden’ sugars.

“So, a muesli bar, you might assume that they are healthy, but when you look at this, you’re like, oh, it’s actually got added sugar when you might assume it’s not in it.”

NEW ZEALAND, UNIVERSITY EDUCATION, WOMAN

“There are some protein bars on the market that are worse [higher in sugar] than eating a Mars Bar.”

AUSTRALIA, NO UNIVERSITY EDUCATION, WOMAN

Preference expressed by some for certain types and sources of sugar

Prior to learning about the possible addition of ‘added sugars’ information in the NIP, some consumers voiced both an interest in knowing, and a concern about, what type and source of sugar a food contained. These consumers tended to perceive the sugars that naturally occur in a food as ‘good sugar’, while processed or refined sugars were seen as ‘bad sugar’. Their assessment of whether a food contained ‘natural sugar’ or ‘naturally occurring sugar’ (such as the sugar in honey or fruit), or if it contained ‘processed’ or ‘highly processed’ sugar (such as refined white sugar), helped determine their purchase preferences.

“Different types of sugars can definitely alter the kids’ behaviour and moods and stuff.”

NEW ZEALAND, NO UNIVERSITY EDUCATION, MAN

“Your body processes each different sugar differently. So, natural occurring sugar, that is going to process easier than a refined sugar. So, I definitely think it’s important to know what portion have they added on top that’s going to be hard for your body to process... I follow a FODMAPS diet, so I wanna know what part is fructose.”

NEW ZEALAND, NO UNIVERSITY EDUCATION, WOMAN

"It's so complicated because you can get like sugars that are good for you, obviously like fruits and stuff, not ultra-processed, and sugars that are bad."

NEW ZEALAND, UNIVERSITY EDUCATION, WOMAN

Addition of 'added sugars' in the NIP was initially viewed positively

Including an 'added sugars' line item in the NIP was initially seen by some consumers as a positive step and a good idea because they believed it would help them determine whether processed sugar had been added to the product (above and beyond any naturally occurring sugar that pre-existed in the product's ingredients).

When shown an example NIP with 'added sugars' listed, those consumers who valued 'natural' sugars saw it as a 'red flag' that processed sugar had been added, and its presence prompted them to double-check the ingredients list to see what type of sugar had been added.

'Added sugars' information used as proxy for whether product was natural or not

In effect, some consumers used 'added sugars' information as a way of determining how natural the product was. Importantly, some participants were so influenced by this assessment that products with less 'added sugars' were viewed as healthier, even if they contained more sugars overall.

A secondary perceived benefit for participants who highly valued no added sugars was the hope that the addition of 'added sugars' in the NIP would force manufacturers to be more transparent about the source of sugar in their products. While the 'added sugars' line alone did not disclose the source of the sugar, consumers surmised that this was sugar not naturally occurring in the main ingredients and then sought out the ingredients list for further information.

"I would assume they were more processed sugars; I would definitely find it helpful to know, as it would be a quick way to see if sugar had been added. But I would assume the higher the number the less 'good' the food is for you."

NEW ZEALAND, UNIVERSITY EDUCATION, MAN

"It'd be great. Added versus natural sugar tells me a lot."

AUSTRALIA, UNIVERSITY EDUCATION, MAN

"Because I've got a 5 year-old, I find having the totals and added sugar quite helpful. I'm trying to lose weight, but for him I'm not worried about calories, but I do look for products that are more natural."

NEW ZEALAND, NO UNIVERSITY EDUCATION, WOMAN

When given the opportunity to propose alternative labelling approaches (see discussion guide, Q7), some people expressed that it would be useful if both 'natural sugars' and 'added sugars' could be listed in the NIP, further reinforcing their interpretation of 'added sugars' as not being naturally occurring, and their desire to be able to easily identify 'natural' sugars.

"You could just guess that natural sugar is the difference between the total sugar and the grams of added sugar, but you have to guess. So, if they have two columns with natural sugar and added sugar, that would be quite simple."

NEW ZEALAND, UNIVERSITY EDUCATION, WOMAN

"I think it would be more clear if they could break it down into natural sugars versus white sugar, brown sugar, that sort of thing."

NEW ZEALAND, UNIVERSITY EDUCATION, MAN

Uncertainty about the meaning of 'added sugars' tempered consumer interest

After closely examining examples of 'added sugars' in the NIP, some participants found the inclusion of 'added sugars' confusing and were not confident they understood what 'sugars, total' or 'added sugars' lines in the NIP referred to. In addition, the label 'added sugars' was considered by some to be too unspecific to be of much use to them and they wanted more information about its meaning.

"Like, what does it mean when you say 'added sugar'? That's basically everything I need to know cause that's the one thing that was confusing."

NEW ZEALAND, NO UNIVERSITY EDUCATION, WOMAN

"Natural sugars is being used a lot... But yeah, what is natural? What is artificial? What is man-made? So, I guess that, yeah, the term's probably not clear...So it's just confusing, really."

AUSTRALIA, UNIVERSITY EDUCATION, MAN

"I have no idea. It is too vague to even know what it is referring to."

AUSTRALIA, NO UNIVERSITY EDUCATION, MAN

As participants were shown different label treatments for single ingredient products such as 100% fruit juice, they often became more confused and started to question the value of including 'added sugars' in the NIP. This is discussed in more detail in Section 4.4 below.

"If you start putting all that on a label that'd be too confusing when you're shopping."

AUSTRALIA, UNIVERSITY EDUCATION, WOMAN

"We really need to be able to absorb the information quickly so that we can make a decision... I love the option for people to make their individual choices, and all of this, but for me personally, it's just, 'Jeeze, give me a single number I can look at and move to picking up my next product off the shelf.'"

NEW ZEALAND, NO UNIVERSITY EDUCATION, MAN

"The more I think about it, the less sense it makes."

NEW ZEALAND, NO UNIVERSITY EDUCATION, WOMAN

Consumers with health concerns such as diabetes that required them to closely monitor their sugar intake did not find the inclusion of 'added sugars' in the NIP particularly valuable, because they had been educated to focus on the total sugar content and to limit their sugar consumption, regardless of its source.

"I just look at the total sugar only."

AUSTRALIA, UNIVERSITY EDUCATION, WOMAN

Educating consumers more on 'added sugars' labelling further diminished perceived usefulness of its inclusion in the NIP

After participants in the main study focus groups were provided with further information on the research purpose and complexities associated with including 'added sugars' in the NIP, most participants concluded that this information would not be as useful to them as they had initially assumed. Participants who could appreciate the complexity could not see an approach to including 'added sugars' information in the NIP that could be quickly understood and usefully applied by consumers in the context of a shopping environment. Many consumers reverted to considering the current sugars information to be sufficient.

"I think we all have different wants from what we want from the label, but we can all probably agree that it's not useful."

NEW ZEALAND, NO UNIVERSITY EDUCATION, WOMAN

"I think if they're gonna add this line, 'added sugars', I think it's a waste of time... Only because at the end of the day the total sugars is already there."

AUSTRALIA, NO UNIVERSITY EDUCATION, MAN

"I don't think putting the natural sugars into the added sugar section sort of makes sense... when you say, 'added sugars', you think of refined sugars or artificial stuff."

NEW ZEALAND, NO UNIVERSITY EDUCATION, MAN

DIFFERENCES BY EDUCATION LEVEL

Consumers across all education levels valued 'added sugars' information because they thought it provided insight into the levels of 'natural' vs 'processed' sugars. Participants in the focus groups who did not have a university-level education appeared more likely than those with a university education to express confusion about sugars information in the NIP from the outset of the focus groups. However, both university-educated participants and those without a university education became increasingly confused about the definition of 'added sugars' as specific hypotheses around potential areas of confusion were tested. Participants of all education levels questioned the transparency and motives of food manufacturers when it comes to food labelling, and ultimately questioned the utility of including an 'added sugars' line in the NIP by the end of the focus groups.

COUNTRY DIFFERENCES

No notable differences were observed between participants in Australia and those in New Zealand in terms of the perceived usefulness of current sugars information in the NIP or the inclusion of an 'added sugars' line.

4.4 QUESTION THREE - 'ADDED SUGARS' AND SINGLE INGREDIENT FOODS

This section describes how consumers understood the term 'added sugars' when presented in the NIP of a 'single ingredient food'. A 'single ingredient food' refers to when a food ingredient that could be defined as 'added sugars' is sold as the food itself. For example, honey, 100% juice, 100% puree, or a bag of sugar. Participants discussed three examples which aimed to test different options for labelling the sugar content of single ingredient foods if 'added sugars' was to be included in the NIP:

- labelling the sugar content of single ingredient foods as added sugars (See discussion guide Q4)
- presenting 0g of 'added sugars' on single ingredient foods (See discussion guide Q5)
- not including an 'added sugars' line in the NIP for single ingredient foods (See discussion guide Q6).

Consumers had clear expectations that the NIPs for the single ingredient foods tested (i.e. honey, apple puree and orange juice) would list 0g 'added sugars'. Confusion and uncertainty resulted from two of the options shown – when an 'added sugars' amount was listed when it was not expected to be (i.e. honey), and when the 'added sugars' line was missing altogether from the NIP while appearing on a comparable multiple-ingredient product (fruit juice products). The option most clear to consumers, aligned with their expectations and most able to facilitate ease of comparison and trust in the label, was the inclusion of an 'added sugars' line showing 0g for apple puree. This was perceived to mean that the product contained naturally occurring sugars that had not been added during manufacturing.

Presenting no added sugars in the NIP for single ingredient foods can be problematic, however, in creating misleading health perceptions when comparing to other similar multi-ingredient products, as discussed in sections 4.5 and 4.6.

Consumers expected a NIP for 100% honey to show 0g 'added sugars'

To explore consumer expectations for single ingredient foods, participants were first invited to complete a poll question that asked them to write what they would expect the nutrition information panel to show for 'added sugars' on a jar of honey. They then discussed their answers as a group.

The majority (62% of the 71 participants) responded that they would not expect a jar of honey to have much, if any, 'added sugars' listed in the NIP, one third (34%) gave a different kind of response and 4% did not respond to the question⁶. Most reasoned that a product that is as naturally sweet as honey would not need to have sugar added as part of the manufacturing process. The possible exceptions they named were:

- cheaper or imported honey products that have been diluted with sugar or syrups (therefore not 'pure' honey)
- flavoured honey products that contain additives to enhance or change the flavour.

⁶ See Appendix C for the full list of open-ended responses to this question.

However, there was a widespread expectation that any product described as ‘natural honey’ or with honey as the only ingredient would contain just honey and nothing else. As discussed previously, the widespread assumption was that ‘added sugars’ described sugar that had been added to the product during manufacturing and would not include naturally occurring sugars in the core ingredients.

"Honey is made up of a naturally occurring sugar, so based on this I wouldn't expect there to be any added sugar of any kind. The only sugar in honey should be what comes in the product, and nothing more."

AUSTRALIA, NO UNIVERSITY EDUCATION, WOMAN

"I wouldn't expect much or any added sugar because it has a large amount of natural sugar to begin with."

NEW ZEALAND, UNIVERSITY EDUCATION, MAN

"Og. Honey is naturally occurring sugar. Wouldn't expect it to be "added" because it exists as sugar already. Calling it "added" feels misleading because although it might add more sugar to your meal you're using it in, it's not "added" in the sense of additional sugar in the manufacturing process."

AUSTRALIA, UNIVERSITY EDUCATION, WOMAN

"I would expect the total sugar to be high, but I would expect / hope for the added sugars to be zero."

NEW ZEALAND, UNIVERSITY EDUCATION, MAN

Confusion caused when single ingredient honey NIP listed ‘added sugars’

Participants were then presented with an image of a jar of 100% honey (Figure 5), which showed both the front and back of the label. The label included a made-up brand and product name along with the weight of the product on the front-of-pack. The back-of-pack included an ingredients list, barcode and NIP listing the same value for ‘sugars, total’ and ‘added sugars.’ This presentation aimed to test consumer perceptions of labelling the sugar content of single ingredient foods as ‘added sugars’ in the NIP.

Figure 5



Ingredients: Honey

SPRINGVALE HONEY
100% HONEY

400 G

NUTRITION INFORMATION		
Servings per package: 26	Serving size: 15g	
	Average Quantity per Serving	Average Quantity per 100g
Energy	212kJ	1420kJ
Protein	0.1g	0.7g
Fat, total	0g	0g
- saturated	0g	0g
Carbohydrate	11.5g	77g
- sugars, total	11.2g	75g
- added sugars	11.2g	75g
Sodium	2.3mg	15mg

1234567890

400 G

Reactions to this label treatment were similar across the focus groups. Many consumers were confused due to:

- an expectation that any product that lists more than 0g 'added sugars' in the NIP must have had processed or artificial sugars added to it as part of the manufacturing process.
- perceived incongruence between the front-of-pack claims, NIP and the ingredients list.
 - several pointed out that according to the NIP, this product contains high levels of 'added sugars' yet the front-of-pack described the product as 100% honey, and there is no additional sugar or sweetener listed in the ingredients list. Consumers perceived this as misleading, and some said that it left them feeling distrustful of the manufacturer and their claims.
- 'sugars, total' and 'added sugars' being listed as the same amounts in the NIP.
 - this left people questioning whether their initial assumption that 'added sugars' refers to processed or extra sugar that has been added to the product during manufacturing was correct. It did not make sense to them that the total sugar and added sugar amounts in a jar of honey could be the same, as they would expect the total to include both the natural sugars in the honey plus any extra sugar that has been added.

"I'm confused now, because when you look at the ingredients it just says honey. That to me I would expect to see the word sugar after honey. If it's got added sugar, you would expect to see sugar."

AUSTRALIA, NO UNIVERSITY, EDUCATION MAN

"It's dodgy - I would not buy that product, there's something not right about it."

NEW ZEALAND, UNIVERSITY EDUCATION, WOMAN

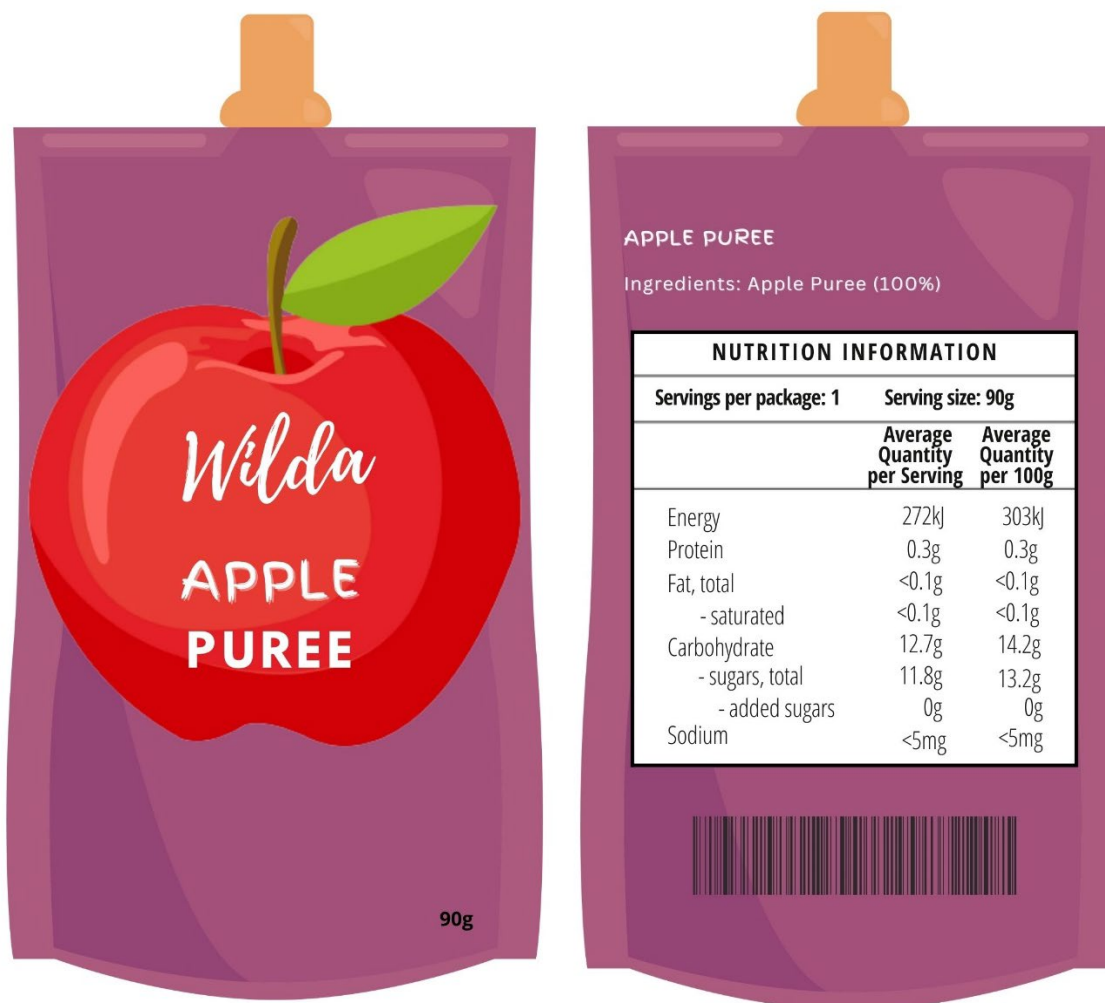
"I'd be a bit discouraged to buy the honey to be honest, as I'd assume it shouldn't have added sugar."

NEW ZEALAND, UNIVERSITY EDUCATION, MAN

Single ingredient fruit puree with 'added sugars' listed as 0g makes sense

Focus group participants were shown the label of a single ingredient apple puree that included a made-up brand and product name along with the weight of the product on the front-of-pack. The back-of-pack included an ingredients list, barcode and NIP listing 11.8g per serving against the line item 'sugars, total' and 0g against 'added sugars' (Figure 6).

Figure 6



Consumers in this research assumed that all of the sugar in this product came from the naturally occurring sugar in the apples. This example did not cause confusion for consumers because the ingredient list, showing no perceived added sugar ingredients, accorded with their expectations of sugars labelling in the NIP. This treatment of listing ‘added sugars’ as 0g in a single ingredient fruit product was appreciated for its clarity and perceived usefulness in comparing similar products. However, presenting 0g of ‘added sugars’ in the NIP of a single ingredient food may create misleading health perceptions when compared to other similar multi-ingredient products, as discussed in sections 4.5 and 4.6.

Consumers unsure of interpretation if ‘added sugars’ inconsistently appears in NIP

Consumers participating in the groups were shown the label of a single ingredient fruit juice of a made-up brand that showed the volume of the product on the front-of-pack, and the back-of-pack included an ingredients list, barcode and NIP with ‘sugars, total’ listed - but no ‘added sugars’ line (Figure 7).

Figure 7



Given the front-of-pack information ('100% juice'), and the single ingredient listed, participants assumed from this label that all of the sugars in the orange juice example came from the oranges squeezed to make the juice.

Participants were also shown a fruit drink label containing more than one ingredient (Figure 8). For this made-up product, the front-of-pack also showed the volume of the product, and the back-of-pack included an ingredients list, barcode and NIP with 'sugars, total' listed as 10.5g and 'added sugars' also listed as 10.5g.

Figure 8



The different treatments of ‘added sugars’ in the NIPs of the same product type (juice) caused some confusion. Consumers wondered why the orange juice label did not include ‘added sugars’ in the NIP, when the orange and passionfruit fruit drink example did list ‘added sugars’. At first, this was taken at face value, and consumers concluded that only one of the products must contain added sugars, necessitating the additional line in the NIP, while the other must not. On consideration, however, they became less certain and wondered whether the orange juice manufacturer might have avoided adding the extra line and if it might contain undisclosed added sugars.

From the labelling information, including the ingredients list, participants generally assumed that the sugars in the orange and passionfruit drink example came mainly from the reconstituted orange juice and passionfruit juice. However, it was less clear what contributed to the ‘added sugars’ content. Some participants raised the idea that ‘added sugars’ may be anything that has been added to a core ingredient, i.e., both the reconstituted orange juice and passion fruit juice would be ‘added’ to the main ingredient of water. Others discussed whether the process of re-constitution somehow made the sugars ‘added sugars’. Some thought that the ‘natural favours’ may contribute added sugars, while others queried whether the ‘acacia fibre’, that was a less familiar ingredient, also contained sugars.

“Four percent is passionfruit juice, and then they’ve probably thrown cordial type things into it to bring the flavours back. Hence the ‘added sugars’ [in the fruit drink].”

AUSTRALIA, NO UNIVERSITY EDUCATION, MAN

“You know, water is probably, you know it’s the first ingredient. So, it is the most prominent ingredient. I guess anything added after that is considered ‘added’, you know.”

NEW ZEALAND, NO UNIVERSITY EDUCATION, WOMAN

“See, I’m still really confused, because I would expect the mixed drink to have natural sugar in it. Not all added sugar.”

AUSTRALIA, UNIVERSITY EDUCATION, WOMAN

Consumers in this research held a general expectation that the NIPs for different products and food categories would include the same information to be able to deliver on a key function: facilitating easy comparison of the nutritional content of different products to make informed decisions. For some people, inconsistencies in how food was labelled led to confusion and suspicion.

“I think as long as you’ve got the consistent information across both products. So, if you have the ‘added sugars’ content for the orange juice, then it’s really easy, because you’ve got the same information to compare to, whereas because it isn’t, that’s making it a little bit more difficult.”

NEW ZEALAND, UNIVERSITY EDUCATION, MAN

“I really wish that they would have it consistent, you know. Like, you can’t compare apples with apples. Why can’t they just put it in a certain order every time on any label? So, when you’re searching, comparing one product with a different product, at least you can compare it easier.”

AUSTRALIA, NO UNIVERSITY EDUCATION, MAN

With further education, consumers concluded that single ingredient product exemptions could be confusing

Information provided to participants at the end of the main study focus groups explained how the perceived inconsistencies between single and multiple ingredient foods that they viewed across the puree and juice example NIPs could arise. Up to this point in the discussion, many participants had not realised that the sugar in single ingredient foods could be counted entirely as ‘added sugars’ or could be exempted from being counted as ‘added sugars’ under different possible approaches. Participants concluded that any approach that allows exemptions or exceptions would be inherently confusing for consumers.

“Like, you know, you add honey as a natural sugar, but then it is considered added sugar because technically it’s been added. So, it’s like, how do you define honey when it’s sold on its own? I don’t know.”

NEW ZEALAND, UNIVERSITY EDUCATION, MAN

“You have like, sugars and then added sugar, and then on another label you have sugar but then you have no added sugars label, that’s what adds to confusion.”

NEW ZEALAND, NO UNIVERSITY EDUCATION, MAN

DIFFERENCES BY EDUCATION LEVEL

Participants with university-level education and those without university-level education appeared united both in their expectations about added sugar labelling of single ingredient products (i.e. that single ingredient items would list added sugars as 0g), and in terms of the level of confusion and suspicion raised if these expectations were not fulfilled.

An example of this alignment is in the results from the 100% honey poll taken during the groups, in which 66% of the 38 participants with a university qualification and 61% of the 33 participants without a university qualification mentioned that they would expect a jar of 100% honey to show no added sugars on the NIP.

COUNTRY DIFFERENCES

There were few differences between participants in Australia and New Zealand in terms of their assumptions about added sugar labelling of single ingredient products in the focus group discussions. The majority across both countries expected that single ingredient foods would list added sugars as 0g. Similarly, participants in both countries expressed confusion if added sugar labelling of single ingredient products appeared to violate this expectation, leading to some suspicion about the contents of the product, truth in labelling and the motives of manufacturers.

There was a difference between consumers in Australia and New Zealand in responses to the poll question asking people to describe what they would expect a jar of 100% honey to show for ‘added sugars’ on the NIP. Participants in Australia appeared less likely than those in New Zealand to say that they would expect such a label to show 0g or nothing for added sugars (55% of the 38 participants in Australia mentioned this, compared to 67% of the 33 participants in New Zealand). They also appeared more likely to give other responses, for example, questioning the purity of honey or a response that did not answer the question, with 39% of participants in Australia doing this, compared to 27% of participants in New Zealand. In some of the Australian focus groups, there was talk of perceived higher and lower quality honey on the market, and this appeared to contribute to expectations about added sugar labelling in these groups; that is, that lower-grade honey may be diluted or added to, and that this might be concealed.

Some participants felt that this was already the case, saying they have heard of honey brands misleading customers about their product, and these participants and others felt this may explain the example honey product label shown in the groups in which it appeared to them that sugar had been added to a product labelled as 100% honey.

4.5 QUESTION FOUR - PERCEPTIONS OF HEALTHFULNESS WHEN 'ADDED SUGARS' IS LISTED IN THE NIP

This section describes how consumers assessed product healthfulness when 'added sugars' was presented in NIPs, including:

- what information they used to assess product healthfulness, and
- whether presenting no or low levels of 'added sugars' in the NIP created misleading health perceptions for foods high in inherent/naturally occurring sugar, including misleading health perceptions regarding sugar content, and/or misleading health perceptions of the product as a whole.

Overall, most consumers could identify which product from two of the same type contained the most total sugars. However, this did not always equate to perceived healthfulness. The inclusion of an amount of 'added sugars' led some to conclude a product was less healthy in terms of sugar because the sugar source was perceived as processed or not natural, rather than basing their assessment of health solely on the amount or volume of total sugars. As a result, presenting no 'added sugars' in the NIP for certain food products, misled consumers into attributing other health qualities to the product and choosing it, despite being understood to contain more sugar overall.

Recognition of the puree lower in sugar did not always equate to healthfulness

To explore consumers' perceptions of healthfulness, participants in the main study were presented with mocked-up labels for two different fruit puree products. One of these products contained 100% apple puree (Figure 6 on page 39), while the other contained apple and banana puree with oats and other ingredients (water, rice flour, cinnamon) (Figure 4 on page 26). The NIP on the apple puree product showed that it had 11.8g of 'sugars, total' and 0g of 'added sugars' per serving. The NIP on the apple, banana and oats puree showed that it had 6.9g of 'sugars, total' and 5.7g of 'added sugars' for the same serving size. The apple, banana and oats puree example counted sugars from the fruit purees towards the 'added sugars' value in the NIP as a potential approach of capturing the sugar from processed fruit products as 'added sugars'. However, the 100% apple puree listed 0g of 'added sugars', reflecting other potential approaches to labelling 'added sugars' (i.e. exempting single ingredient foods from 'added sugars' labelling or excluding processed fruit products from being defined as 'added sugars'). In a poll, participants were asked to respond to these questions individually:

- How healthy does this apple puree/apple, banana and oats puree product seem to you in terms of sugar? Responses were provided on a five-point Likert scale where 1= very unhealthy and 5= very healthy. (NB: This question was only asked of participants in the pre-test groups)
- If you wanted to buy a fruit puree product that was healthier in terms of sugar, which of these two products would you choose to purchase? (NB: This question was only asked of participants in the main study groups)
- Which of the two fruit puree products do you think has the most sugars in it? (NB: Asked of all participants).

Overall, 77% of the 71 research participants nominated the 100% apple puree as containing the most sugars overall, 18% chose the apple, banana and oats puree and 4% did not respond to the question. However:

- most of the participants in the pre-test rated the apple puree as healthier in terms of sugar, compared with the apple, banana and oats puree (for example, 53% of the 15 pre-test participants gave the apple puree a rating of 5 ('very healthy'), compared to 7% giving the apple, banana and oats puree a rating of 5 ('very healthy'))
- furthermore, when participants in the main study were asked which of these two products they would purchase if they were looking for a fruit puree product that was healthier in terms of sugar, 54% of the 56 main study participants chose the 100% apple puree⁷.

Some chose the puree higher in sugar based on a preference for natural sugars

Further discussion revealed that many of these consumers had based their assessment of the healthfulness of the product in terms of sugar on more than just the total sugar content. As discussed previously, for some, the type or source of sugar in the product was just as important, if not more so, than total sugars. In particular, sugar derived from natural sources (such as the naturally occurring sugar in the apple puree) was often seen by consumers as better for their health than processed sugars such as refined white sugar or high fructose corn syrup. Thus, while the apple, banana and oats puree contained less sugar overall, the fact that it contained 5.7g of 'added sugars' (compared with 0g of 'added sugars' in the apple puree product) led some consumers to conclude that the apple puree was healthier in terms of sugar. This was despite the fact that the apple, banana and oats puree also did not contain processed sugars. Indeed, it was of concern to some that they could not identify the source of the 'added sugars' in the ingredients list, prompting mistrust of the product.

Some participants saw that the 'added sugars' in the 100% apple puree was 0g without noticing the 'sugars, total' line above, and immediately concluded that it was both lower in sugar and healthier in terms of sugar than the apple, banana and oats puree.

"I would go for apple puree – even though it's higher in sugar, it's natural. Whereas the other is processed sugar. I always thought natural sugar is better for you."

NEW ZEALAND, NO UNIVERSITY EDUCATION, WOMAN

"It really is just an apple that's pureed. It's the closest you can get to healthy... And if an apple's healthy, then I assume the natural sugar's healthy. So that's how I'd look at it."

AUSTRALIA, NO UNIVERSITY EDUCATION, MAN

"I think the apple puree was the healthy one, because it had no added sugars, so nothing... nothing at all added to the ingredients."

AUSTRALIA, NO UNIVERSITY EDUCATION, WOMAN

⁷ In comparison, 39% of the main study participants chose the apple, banana and oats puree as healthier in terms of sugar and 7% did not provide a response the poll question.

Most identified that orange juice's higher total sugars would impact healthfulness

Participants were also shown mocked up labels of two different fruit juice products. One was a label for a product containing 100% orange juice (Figure 7 on page 40) that showed the 'sugars, total' as 24.4g per 250mL serve, but did not have a line item for 'added sugars'. The other was a label for an orange and passionfruit fruit drink (Figure 8 on page 41) that listed a number of ingredients (Water, Reconstituted Orange Juice (56%), Passionfruit Juice (4%), Acacia Fibre, Natural Flavours, Vitamin C), 'sugars, total' as 10.5g per 250 mL serve and 'added sugars' as 10.5g per 250 mL serve. As with the apple, banana and oats puree example, the orange and passionfruit fruit drink example counted sugars from the processed fruit products (i.e. the fruit juices) towards the 'added sugars' value in the NIP. However, the 100% orange juice did not include an 'added sugars' line in the NIP, reflecting a potential approach to exempting single ingredient foods from 'added sugars' labelling.

As with the previous activity that compared the two different puree products, participants were asked to complete a number of poll questions about the total sugar content and healthfulness of these juice products before discussing their answers as a group:

- How healthy does this orange/orange and passionfruit juice product seem to you in terms of sugar? Responses were provided on a five-point Likert scale where 1= very unhealthy and 5= very healthy. (NB: This question was only asked of participants in the pre-test groups)
- If you wanted to buy a fruit juice product that was healthier in terms of sugar, which of these two products would you choose to purchase? (NB: This question was only asked of participants in the main study groups)
- Which of the two fruit juice products do you think has the most sugars in it? (N.B. Asked of all).

Overall, 86% of the 71 research participants indicated that the 100% orange juice had the most sugars in it, while 11% chose the orange and passionfruit drink and 3% did not respond to the question. Close to two-thirds (64%) of the 56 participants in the main study also indicated that they would purchase the orange and passionfruit drink if they wanted to buy a fruit juice product that was healthier in terms of sugar, while 32% selected the 100% orange juice and 11% did not respond.

In the pre-test, participants appeared to rate the healthiness of the two juice products more equally in terms of sugar, for example, 20% of the 15 pre-test participants gave the 100% orange juice a rating of 4 or 5 (where 5 indicated 'very healthy') and the same proportion (20%) gave the orange and passionfruit drink a rating of 4 or 5.

Consumers appeared more likely to perceive negative health impacts of the sugar in the single ingredient juice, than the single ingredient puree. This may have been due to:

- possible greater awareness of fruit juice containing a high level of sugars that need to be limited
- the higher amounts of sugar (per 100 grams) in both juice products, and the greater disparity in sugar content between the single ingredient juice compared to the single ingredient puree attracting closer scrutiny
- the exclusion of an 'added sugars' line for the 100% orange juice may have encouraged participants to compare on the basis of the 'sugars, total' line
- order effects of the study, where discussion relating to purees preceded the example of juices and may have impacted the way some participants evaluated healthiness in respect of sugar.

"I feel like it's pretty common knowledge that most fruit juice is pretty bad, just because it's usually really processed, even though like fruit it does have natural sugar."

NEW ZEALAND, UNIVERSITY EDUCATION, WOMAN

"Just because it's natural orange juice doesn't mean that it won't give you a massive sugar spike."

AUSTRALIA, UNIVERSITY EDUCATION, MAN

"Sugar is sugar and essentially whatever [type] of sugar it is, whether it's naturally occurring, it still gives you the bad health."

AUSTRALIA, NO UNIVERSITY EDUCATION, WOMAN

Some still chose the orange juice for its perceived naturalness

However, for other participants (32% in the poll), the decision around which of the two products was healthier in terms of sugar was less clear cut. Some felt that the 100% orange juice was a healthier product, even though the total sugar content was higher. Drawing on information from the ingredients list, the NIP and front-of-pack claims, they concluded that the 100% orange juice was healthier than the fruit drink. Their reasoning was based on beliefs such as:

- the 100% orange juice is less processed and more natural than the orange and passionfruit drink because the only ingredients listed are oranges
- the source of the 'added sugars' listed in the NIP for the fruit drink is likely to be highly processed sugars or sweeteners that have been added during the manufacturing process to enhance the flavour, without adding any nutritional value
- the fruit drink label cannot be trusted because no apparent added sugar ingredient is listed in the ingredients list (which led some consumers to believe that the label was not fully transparent about the source of the 'added sugars').

Thus, including 'added sugars' in the NIP for the fruit drink but not for the 100% orange juice could create misleading health perceptions around both the sugar content and the product as a whole.

"The closest to its natural form would be the healthiest."

AUSTRALIA, NO UNIVERSITY EDUCATION, MAN

"I'm looking at the juice and going, 'Oh, this is a bit higher than I maybe would have expected', but also it's natural so that's alright."

NEW ZEALAND, UNIVERSITY EDUCATION, WOMAN

"I'd probably go the 100% orange juice, because I'm told that it's 100% orange juice."

AUSTRALIA, NO UNIVERSITY EDUCATION, WOMAN

In summary, in both the puree and juice examples, a number of factors were taken into consideration by participants in making a judgement about the healthfulness of the product in terms of sugars, including:

- Total grams of sugars
 - While this was usually considered the most important determinant of the healthfulness of the product in terms of sugars by people who were diabetic, for others it was more important that the sugar in the product was from natural, unprocessed sources.
- Total grams of 'added sugars'
 - 'Added sugars' was often interpreted by consumers to mean added processed sugar, or potentially food additives such as artificial sweeteners and flavours. Products with higher quantities of 'added sugars', brought into question the healthfulness of these products, such as the apple, banana and oats puree, and products with no 'added sugars' were generally thought of as healthier, all things being equal.
- Ingredients
 - Where consumers deemed 'added sugars' to be high, this often prompted them to look at the ingredients list to attempt to determine what type of sugar or sweetener had been added. In the case of the apple, banana and oats puree product (which featured a NIP on which the sugars from the apple and banana puree were counted as 'added sugars'), it wasn't always clear to participants where the 5.7g of 'added sugars' came from, as they did not recognise that the fruit ingredients contributed to 'added sugars'. Likewise, consumers could only guess at the source of the 'added sugars' in the orange and passionfruit fruit drink (arising from the fruit juice ingredients) as there was no apparent added sugar ingredient in the ingredients list. Some participants assumed that the source was the 'natural flavours' or 'acacia fibre' rather than the passionfruit juice or reconstituted orange juice. Only when there was no other feasible explanation, did a few participants surmise that the 'added sugars' may be referring to these fruit sources, with some questioning whether it was the process of re-constitution which made them count as 'added sugars'. Overall, the lack of detail of what 'added sugars' means left them feeling confused, and even suspicious.
- Total carbohydrates
 - A small number of participants in this study argued that total carbohydrates was the most important determinant of healthfulness because carbohydrates are converted into sugars during digestion.

'Added sugars' labelling had the potential to distort healthfulness evaluations

Information provided to participants at the end of the main study focus groups about the different possible treatments of 'added sugars' information in the NIP, led some (particularly those valuing natural products) to realise they had made errors in evaluating product healthfulness based on assumptions about the labelling information. In seeing that 'added sugars' information may not differentiate sugars which are 'naturally' occurring in the ingredient from those that are not, participants concluded there is a risk that 'added sugars' labelling would confuse consumers and distort decision-making.

"I think this group and the conversation that we've had is really telling of the confusion around what 'added sugars' is, and the challenge of having the general population understand the meaning of that. I do think that, like a lot of people would look at that and then be like, oh, that's immediately bad."

AUSTRALIA, UNIVERSITY EDUCATION, WOMAN

"You know fruit has a lot of sugar in it. We know that that's where it's all coming from. If I saw it as the x%, or whatever was added sugar, I would assume that that was on top of the naturally occurring sugars in the fruit."

NEW ZEALAND, NO UNIVERSITY EDUCATION, WOMAN

DIFFERENCES BY EDUCATION LEVEL

Two fruit puree polls of the 29 participants with a university-level qualification and 25 participants without a university qualification in the main study groups revealed some differences based on education level in how participants assessed sugar levels and healthfulness (in terms of sugar) of products when considering total sugars and added sugars information in the NIP.

Main study participants without a university-level education appeared less likely than those with a university-level education to identify that a mixed puree product with less total sugars and some added sugars was healthier in terms of sugar than a 100% apple puree product with more total sugars and no added sugars. On this poll, 53% of main study participants with a university education perceived the lower total sugars product as healthier in terms of sugar, compared to only 23% of the main study participants without a university education. Despite this difference, it is also worth noting that more than four in ten main study participants with a university-level education (45%) perceived the higher sugar product as healthier in terms of sugar.

Main study participants without a university-level education also appeared less likely than those with a university education to identify that a 100% apple puree product contained more sugar than a mixed puree product with less total sugars listed on the NIP. On this poll, 83% of main study participants with a university education perceived the 100% apple puree product to contain the most sugars, compared with 69% of main study participants without a university education.

Education differences were not apparent across the same types of questions asked subsequently about two different juice products. For example, similar proportions of main study participants with a university education and main study participants without a university education perceived a lower total sugars juice product as healthier in terms of sugar (63% compared to 65%). The proportions of main study participants with a university education and main study participants without a university education perceiving that a 100% orange juice product contained more sugar than a mixed fruit drink product with less total sugars listed on its NIP were also close (90% compared to 85%).

COUNTRY DIFFERENCES

Very minor differences were observed by country in terms of how product sugar levels and healthfulness were assessed when considering total sugars and added sugars information in the NIP.

Looking at the poll results for questions comparing the sugar levels of the two juice products, participants in New Zealand appeared only slightly more likely than participants in Australia to identify that the 100% orange juice product contained more sugar than the mixed juice product, though most participants in both countries were accurate in their response to this question (88% of the 26 main study participants in New Zealand compared to 84% of the 31 main study participants in Australia). In contrast, participants in Australia appeared more likely than participants in New Zealand to identify the mixed puree product as healthier in terms of sugar than the 100% apple puree product with higher total sugars (42% of the 31 main study participants in Australia compared to 35% of the 26 main study participants in New Zealand). More people in both countries gave an inaccurate rather than accurate response to this question.

4.6 QUESTION FIVE - COMPARING FOODS WITH DIFFERENT SUGARS INFORMATION

This section describes how consumers compare foods when sugars information is presented in NIPs in different ways across different food products.

Since the NIP is a tool used by consumers to choose between products, consistency of labelling across similar products supported ease of product comparison, while inconsistency served as a barrier. Consistency between the information in the NIP and the ingredients list was also important. Confusion and mistrust resulted when these two pieces of information were perceived as inconsistent, because the approach to labelling 'added sugars' did not match consumer's understanding of 'added sugars' (e.g. labelling 'added sugars' on single ingredient foods or counting sugars from processed fruit as 'added sugars'). To help make comparisons, some consumers sought to understand relative sugar content, but simply signalling sugars are 'HIGH' raised more questions than it answered.

Consistency supported ease of comparison between similar puree products

In this research, direct comparisons between products were simulated by presenting participants with labels for two different types of fruit purees (Figure 4 on page 26 and Figure 6 on page 39). As described in Section 4.5 above, the labels for the purees both included 'added sugars' as a line item in the NIP in a consistent format, but the 'added sugars' was 0g on the 100% apple puree⁸, while the NIP for the apple, banana and oats puree listed 5.7g per serving of 'added sugars' (arising from the apple and banana puree ingredients). Using a consistent format for presenting the nutritional information across these two products was seen by consumers as helpful for making comparisons between similar products.

Confusion and mistrust caused by 'added sugars' in NIP when no added sugar was apparent in puree ingredients

As discussed in Section 4.5, some consumers still found it difficult to judge which of the puree products was healthier in terms of sugars. While most participants understood that the 100% apple puree contained more sugar overall, having 'added sugars' listed as 0g in the NIP led many to believe it was healthier because it did not contain any added sugar. In contrast, the reference to 5.7g per serving of 'added sugars' in the NIP for the apple, banana and oats puree led consumers to believe that processed sugar had been added to this product during the manufacturing process. With no apparent added sugar ingredient in the ingredients list for the apple, banana and oats puree, this left some consumers confused and suspicious about the label for this product.

"The ingredients list is not telling me that this is refined sugar, and it's just telling me that this has apple, bananas, water, rice, flour, and cinnamon. So, what does added sugars actually mean in this?"

NEW ZEALAND, NO UNIVERSITY EDUCATION, WOMAN

⁸ The 100% apple puree label presentation reflected both a potential approach to labelling 'added sugars' on single ingredient foods, and an approach for not defining processed fruit products as 'added sugars'.

"What are they trying to hide?"

AUSTRALIA, NO UNIVERSITY EDUCATION, MAN

Inconsistency in juice labelling perceived as a barrier to comparison

Participants were also shown mocked-up labels for two different juice products, as described in Section 4.5 above (Figure 7 on page 40 and Figure 8 on page 41). When comparing these examples, participants noted that the NIP for the product labelled 100% orange juice had no reference at all to 'added sugars', while the NIP for the orange and passionfruit drink listed the quantity of both 'sugars, total' and 'added sugars' per serving as 10.5g each.

Many participants found it easier to read and interpret the orange juice label because the absence of 'added sugars' in the NIP aligned with their expectation that a drink labelled 100% juice would not contain added sugars. However, other consumers pointed out that the absence of the 'added sugars' line in the NIP did not necessarily mean sugar had not been added. As a result, some struggled to assess and compare the total sugar content and overall healthfulness of these two products.

Although the amount of 'sugars, total' for the 100% orange juice was substantially higher (at 24.4g per serving compared to 10.5g in the orange and passionfruit drink), the fact that 'added sugars' was listed in the NIP of the orange and passionfruit drink, but not in the NIP for the orange juice made it more difficult for some consumers to compare them. As in the puree example, in the absence of an apparent added sugar ingredient in the ingredient lists of the fruit drink, participants were confused as to the source of the 'added sugars' listed in the NIP. There was widespread agreement that the kind of information included in the NIP, as well as how that information is presented, should be consistent across all products to allow for easy comparison.

"I think it's confusing. The drink has a lot of ingredients, but it doesn't say sugar is one of the ingredients. Where is the added sugar coming from? I wouldn't think passionfruit is added sugar."

NEW ZEALAND, NO UNIVERSITY EDUCATION, WOMAN

"I would rather have consistent information. That all products have to follow a consistent pattern."

AUSTRALIA, NO UNIVERSITY EDUCATION, WOMAN

"Maybe it's all added sugar and we just don't know. I'd much rather have a line that said zero added sugar than no line and just be wondering."

NEW ZEALAND, UNIVERSITY EDUCATION, MAN

Some sought to understand relative sugar content to support decisions

Several participants in this study also mentioned that they found it difficult to determine whether the total sugar content in products was high or low in relation to healthfulness and would welcome more guidance around this. Suggestions from consumers regarding what would be helpful included:

- the incorporation of visual cues, such as a traffic light system, to indicate whether a product contains high, medium or low levels of sugar
- showing sugar content per serving as a proportion of recommended daily intake.

“I quite like the way packaging was done in the UK where it had like a traffic light rating for the different ingredients that made up a product, which is quite visual.”

NEW ZEALAND, UNIVERSITY EDUCATION, MAN

“Maybe it needs to be a bit clearer what a recommended amount of sugar a day is.”

AUSTRALIA, NO UNIVERSITY EDUCATION, WOMAN

Addition of ‘HIGH’ alongside ‘sugars’ was generally positive for consumers monitoring sugar

To explore what additional information might be helpful to consumers, participants were shown an example of a NIP that included the word HIGH next to the quantity of sugars per 100g (Figure 9).

Figure 9

NUTRITION INFORMATION		
Servings per package: 6.3		Serving size: 160g
	Average Quantity per Serving	Average Quantity per 100g
Energy	571kJ	357kJ
Protein	7.0g	4.4g
Fat, total	3.0g	1.9g
- saturated	1.9g	1.2g
Carbohydrate	20.0g	12.5g
- sugars	19.4g	HIGH 12.2g
Sodium	90mg	56mg

Reactions to this idea were mixed. Some participants reacted favourably because it provided a clear indication that the product contained high quantities of sugar. Those who were closely monitoring their sugar consumption claimed they would either avoid this product, look for an alternative, or eat it in moderation.

"It's a good indication that it's a lot, because some people don't know what's a lot and what's not. Like for my sister, she's diabetic. She's almost ready to move out of home. She's also autistic. So just having that information for her, it would be good for her to look at it and for it to indicate that's high, so she can instantly be like, 'Ok, I'll skip it'."

NEW ZEALAND, NO UNIVERSITY EDUCATION, WOMAN

"Participating in this conversation has made me realise that, actually, I don't probably know a whole lot about this sort of stuff, or maybe less than I initially thought I did. So, any sort of extra information is gonna be welcomed."

NEW ZEALAND, UNIVERSITY EDUCATION, WOMAN

For some, the addition of 'HIGH' raised more questions than it answered

Some felt that including the label 'HIGH' against 'sugars' in the NIP confused matters further because:

- it was not clear what the word 'high' referred to (that is, whether the sugar content was high compared to other brands in the same product category, or high as a proportion of their daily intake)
- it did not address consumers' confusion and questions around whether the sugar was naturally occurring sugar in the product's ingredients, processed sugar that had been added, or something else.
- labelling only the sugars (and not other nutrients in the product) as 'high' implied to some that the levels of other nutrients in the product, such as sodium or fat, were low, or served to attract attention towards the sugars information (and potentially away from other macro-nutrients).

"High in comparison to what? I don't know."

NEW ZEALAND, NO UNIVERSITY EDUCATION, WOMAN

"That tells me nothing.... it still doesn't tell you whether it's natural sugar."

AUSTRALIA, UNIVERSITY EDUCATION, MAN

"When I drop down to look at the sodium level to me that seems extremely high. But I would miss that if I was just looking at that and going, 'Oh, that's got high sugar'."

NEW ZEALAND, UNIVERSITY EDUCATION, MAN

On balance product comparisons may not be aided by 'added sugars' labelling as proposed

Towards the end of each main study focus group, the complexities of dealing with fruit sugars and single ingredient products in 'added sugars' labelling in the NIP was explained. Information about 'added sugars' labelling and exemptions made clear to some participants that it could be problematic using 'added sugars' information in the NIP for product comparisons, Particularly in the typical shopping environment where there are time pressures. More information about the challenges of dealing with exceptions only reinforced consumers' desire for consistency in NIP labelling to support product comparison.

"I don't think it helps ['added sugars' line in NIP]. I think it just adds more questions and queries ... always making it more complicated than it needs to be."

AUSTRALIA, UNIVERSITY EDUCATION, MAN

"So, whether they want to break it down and put total sugar, and then added sugar, I think that will end up confusing a lot of people. But if they're very clear in their ingredients and in those carbohydrates, sodium, fat, protein, I think that's enough for people to make a good judgement without confusing us with too much information."

NEW ZEALAND, NO UNIVERSITY EDUCATION, WOMAN

DIFFERENCES BY EDUCATION LEVEL

The desire for consistent labelling information across products was equally strong across groups with different education levels. It appeared from discussions and poll results that consumers with the lowest levels of education (e.g. high school only) were more likely to express confusion, have difficulties and questions around interpreting aspects of the NIP, and give inaccurate responses to poll questions. These participants appeared particularly to call for greater simplicity and less complexity in the information presented on food labels to enable them to quickly make food decisions. They also tended to use the presence of 'added sugars' as a shorthand for 'less healthy' than those with higher levels of education, who appeared more inclined to take in a wider variety of information when comparing the healthiness of products within and across categories.

COUNTRY DIFFERENCES

The desire for consistent labelling information across products was also common across Australian and New Zealand focus groups. Focus group participants in both countries struggled to compare foods when sugars information was presented in NIPs in different ways across products in the same category. Confusion only increased over the course of the groups in both countries as added sugar was treated differently across the NIPs shown on different types of food products.

5. Discussion and limitations

5.1 DISCUSSION

The findings that emerged from the focus groups showed that both contextual and personal factors should be considered in interpreting consumer responses to 'added sugars' in the NIP.

At an individual level, consumers had highly variable engagement, interest, knowledge and concerns about food and food labelling. Their own health and the needs of household members strongly impacted their perceptions and behaviour. This, combined with consumers' pre-existing understanding of and familiarity with specific terms (used generally and in food labelling), strongly influenced how they perceived the proposed inclusion of an 'added sugars' line in the NIP.

The NIP was considered important information and was currently referred to, not only on its own, but alongside other food labelling information, such as the ingredients list and front-of-pack claims. This was especially true when considering a new product, making comparisons and choosing between products. Crucial to these functions was consistency of labelling - both across similar products, as well as perceived consistency between information in the NIP and the ingredients list for the same product. Any inconsistencies increased cognitive load, and could create confusion, bringing into question the trustworthiness of the label, the product itself, or the manufacturer. With respect to any change to food labelling, the findings pointed to the following pre-existing assumptions about the meanings of words, which were apparent from consumer interpretations of the food labelling changes tested:

- "natural sugar" = sugar occurring naturally in an ingredient in raw form
- "added sugar" = sugar added to a food for sweetness during manufacturing/processing
- "no added sugar" = front-of-pack marketing claim

These implicit language associations meant that in the minds of some consumers, "added" could not equate to "natural". This association of "added" with "not natural" was a powerful force influencing consumers' views of the tested labels and their expected product choices. Total 'sugars' (currently) and 'added sugars' (as tested), were only one part of how product healthfulness, in terms of sugar and overall, were determined. Based on the labels tested in this research, when provided with 'added sugars' information in the NIP, some consumers preferred a product higher in total sugars over one containing 'added sugars', as 'added sugars' signalled that the product was less natural than the comparative product. There is potential for consumers to be misled with the addition of 'added sugars' labelling in the NIP, given that some consumers' preference for 'natural' food products can outweigh consideration of the total amount of sugar.

Even though consumers did perceive a distinction between 'sugars, total' and 'added sugars', once both appeared in the NIP, there was some confusion about whether 'added sugars' was a component of 'sugars, total', or in addition to it. Confusion about the meaning of 'added sugars' in the NIP worsened when it appeared to contradict other contextual information such as the ingredients list. This study supports other research evidence in that those without university education tended to find this more confusing, both in terms of the relationship between total sugars and 'added sugars' as presented in the NIP, and when other labelling information did not seem to accord with there being 'added sugars'.

In this research, consumers showed clear expectations that single ingredient foods would list the amount of 'added sugars' as 0g. Confusion and uncertainty resulted from options tested that did not

conform to this expectation or were inconsistent in how sugars were shown in the NIP. This in turn impacted consumer trust in the accuracy of the label, the product and its manufacturer. Overall, any 'added sugars' information would be most valued by consumers if the definition of 'added sugars' matches their interpretation, and if this is consistently applied across products in the same category. Though this does necessarily mean such information would result in choices that accord with the dietary guidelines.

Consumers express a desire for clear and transparent sugars information on pack, including in the NIP. As proposed, the 'added sugars' line in the NIP does not meet this need. The provision of additional information in this research to explain to consumers the reasoning behind the proposed 'added sugars' labelling approaches, did little to enhance its perceived value or clarity.

CONCLUSIONS

If the goal of including 'added sugars' in the NIP is to better support decision making according to the dietary guidelines in both Australia and New Zealand, then the changes as implemented and tested in this research were unsuccessful in this.

Consumers were not in a position to appreciate or understand the complexity of the added sugars labelling issue, such as exemptions for single ingredient products or the inclusion of 'natural' fruit products as 'added sugars', and even after participating in the focus groups and having these approaches explained, only partially grasped this complexity. In an actual purchase setting, consumers are unlikely to have either the time, focus or interest to understand, and may instead rely on their habitual, reflexive responses and interpretations.

In attempting to deal with this complexity, any approach to including an added sugars line in the NIP that results in apparent inconsistencies, either across products within the same category or between labelling elements on a product (e.g. between the NIP and ingredients list), could create its own set of issues and assumptions that may lead to confused decision making, or evoke issues with trust and confidence in products, labels and manufacturers.

Once the added sugars line was included in the NIP, there was a dilution of focus from the total sugar content and leading to uncertainty over which of the two sugars lines consumers would focus on. Some consumers continued to preference the total sugars (e.g. people living with diabetes, parents or people on specific diets), but for others it was unclear whether they should show more interest in the 'added sugars' or the total sugars (or both).

This research showed that consumers acted on their assumptions of what 'added sugars' means, which sometimes caused them to make decisions that were not in line with the dietary guidelines. In effect, the addition of 'added sugars' information was used as a proxy for 'unnatural' and actually encouraged some people to choose less healthy products in terms of sugars than they might otherwise have, if 'added sugars' information was not displayed.

There was some evidence in this research that consumers without a university education are more inclined to be misled by the addition of 'added sugars' in the NIP, resulting in the possible purchase of products which are higher in sugars overall, but perceived to be healthier in other terms, such as being more 'natural'. However, confusion was prevalent across all groups, and was not aided by explanations provided at the end of the focus groups. There appeared to be a tension between a preference for simpler information and more detailed information about sugars.

On balance, any new information in the NIP best addresses consumer's stated needs if it is concise and quickly digested, to allow them to make an assessment or relevant comparison. If the inclusion of 'added sugar's in the NIP increases complexity or confusion, consumers may resort to pre-existing understandings and front-of-pack claims, making conclusions and purchase choices that are more idiosyncratic than informed. On balance, the inclusion of an 'added sugars' line in the NIP as tested may result in less healthy consumer decisions.

While the information provided at the end of the focus groups was not designed to be an education campaign, this research suggests that educating consumers about 'added sugars' labelling will not be straightforward. After being provided with further information, consumers did not find 'added sugars' information more useful or demonstrate a significantly enhanced understanding. To the contrary, the research suggests that education could reinforce confusion and undermine consumer perceptions of the value of any additional sugars information.

These research findings point to the need for serious consideration of whether added sugars information should be included in the NIP, and if so how – given the risks that perverse outcomes in consumer behaviour are possible if an 'added sugars' line is added as tested in these focus groups.

5.2 LIMITATIONS

There are several limitations of the current research that should be taken into account in interpreting the findings. Firstly, given the qualitative nature of this research, the findings are based on a relatively small sample drawn from a population of people who have indicated interest in participating in market research. The strength of a qualitative research approach is that it is able to identify the range of views among Australian and New Zealand consumers on the questions of interest to the research and provide some insight as to why these views may be held. However, it cannot show the extent to which each of these views are held among the broader Australian and New Zealand populations. Despite this, the consistency of findings across the focus groups suggests that the understandings and views outlined in this report are widely held.

A limitation of this specific research is that all of the demographic and psychographic factors of interest were not able to be perfectly counterbalanced across the sample structure and, as in all qualitative research, trade-offs were necessary in order to facilitate recruitment. There were also some unavoidable last-minute no-shows in some of the groups. These factors contributed to slight skews across the countries in sampling factors that may have influenced the findings, such as education and household income. For example, there ended up being more participants across the New Zealand groups with a university-level qualification than across the Australian groups. Thus, apparent differences between the countries may be the result of imbalances in other factors, such as education, rather than anything to do with living in that particular country.

Finally, the online research method and its conduct entirely in English is likely to have precluded some people with technological disadvantage or with lower English proficiency from inclusion in the research.

6. Appendix A: Sample characteristics

Recruitment screener reference	Characteristics	Australian Sample n=38	New Zealand Sample n=33
S1	Age		
	18-34 years	9	14
	35-54 years	16	13
	55 or older	13	6
S2	Gender		
	A man or male	16	14
	A woman or female	22	19
	Non-binary	0	0
S7	Level of education		
	High school	7	5
	Vocational/trade qualification	12	10
	Undergraduate university degree	12	8
	Postgraduate university degree	7	10
S3	State/region		
	NSW / ACT	16	
	VIC / TAS	10	
	QLD	8	
	SA / NT	2	
	WA	2	
	Upper North Island		22
	Lower North Island		3
	South Island		8

Recruitment screener reference	Characteristics	Australian Sample n=38	New Zealand Sample n=33
S4	Location		
	Major city	22	15
	Regional, rural, remote	16	18
S12	Employment status		
	Employed full time	17	17
	Employed part time or casual	7	5
	Self-employed / business owner	2	5
	Unpaid caregiver/ home duties	5	2
	Studying or not employed	1	3
	Retired	5	1
	Something else	1	0
S10	Cultural background		
	Australian	21	
	English, Irish, Scottish	16	
	Aboriginal and/or Torres Strait Islander	7	
	Chinese	4	
	Western European	3	
	Other	5	
	New Zealand European		16
	Māori		6
	Chinese		2
	Indian		2
	Other		9

Recruitment screener reference	Characteristics	Australian Sample n=38	New Zealand Sample n=33
S13	Household structure		
	Live alone	5	4
	Live with flatmates/friends	1	3
	Live with a partner/spouse	14	11
	Live with a partner/spouse and children	13	9
	Live with children	3	2
	Multi-generational family – grandparent(s), parent(s) and children living together	1	3
	Other (please specify)	1	1
S5	Food shopping for household		
	Do all or majority of the food shopping for household	29	23
	Share food shopping with someone else	9	9
S8	How often look at nutritional information on food packaging or containers when shopping		
	Always	10	6
	Most times	11	10
	Sometimes	13	12
	Rarely	4	5
S9	How often try to limit sugar in diet		
	Always	10	9
	Mostly	13	12
	Occasionally	11	8
	Never	4	4

Recruitment screener reference	Characteristics	Australian Sample n=38	New Zealand Sample n=33
S11	Current impacts on food choices made for self or household		
	Food allergy or food intolerance	12	6
	Digestive concerns such as coeliac disease, irritable bowel syndrome, etc.	12	2
	Other diet-related health concerns such as diabetes, heart disease, high blood pressure, etc.	11	0
	Pregnancy or breast feeding	0	2
	Looking to lose weight and/or maintain a healthy weight	17	17
	Vegetarian or vegan	1	2
	Religious beliefs that affect food choices	1	3
	Training for sports that affects food choices	2	4
	Other things that affect food choice	4	0
	None of the above	8	10

7. Appendix B: Research materials

RECRUITMENT SPECIFICATIONS AND SCREENER

GROUP SCHEDULE

Group #	Group details	Date	Time
1	Australia – No uni education (Pre-test)	Tuesday 27 February	6pm
2	New Zealand – University education (Pre-test)	Wednesday 28 February	6pm (NZDT) (4pm AEDT time)
3	New Zealand – No uni education	Tuesday 12 March	6pm (NZDT) (4pm AEDT time)
4	Australia – No uni education	Wednesday 13 March	6pm
5	New Zealand – University education	Wednesday 13 March	6pm (NZDT) (4pm AEDT time)
6	Australia – University education	Monday 18 March	6pm
7	Australia – University education	Tuesday 19 March	6pm
8	Australia – Mixed education level	Tuesday 19 March	7:30pm
9	New Zealand – Mixed education level	Wednesday 20 March	6pm (NZDT) (4pm AEDT time)
10	New Zealand – No uni education	Thursday 21 March	6pm (NZDT) (4pm AEDT time)

GROUP SPECIFICATIONS

- **Remote fieldwork –**
 - All groups will be conducted by Heartward using Zoom and hosted by City Group Rooms (CGR).
 - Ensure all prospective participants have the technology and skills to be able to participate via Zoom and will have a private and quiet space set up to participate in the group.
 - Participants will be onboarded by CGR staff (by phone and onscreen) to check participant identification and ensure set-up and technology is working, so need to be online 15 minutes before the group is due to start to enable these checks.
- 2 waves of fieldwork to allow for any tweaks to interview guide:
 - Wave 1: Groups 1 & 2 – Tuesday 27 and Wednesday 28 February 2024
 - Wave 2: Groups 3-10 – Tuesday 12 to Thursday 21 March 2024

- Session **duration** - 90 minutes
- Session **sizes** - Recruit 8 for 6-8 participants in each group
- **Incentives** \$100 gift card per person, to be handled by recruiters
- Groups primarily segmented on education level as shown in table above. Will also include a diversity of consumers across the sample by ensuring through screening a:
 - mix of jurisdictions (Australian states/territories and New Zealand Upper North Island, Lower North Island and South Island) (S3)
 - mix of urban and regional/rural locations (S4)
 - mix of ages (18+) (S1)
 - gender balance (accepting a slight female skew may occur given the household food shopper criteria) (S2)
 - mix of attitudes towards sugar (S9b)
 - mix of usage of nutrition information on food labels (regular use vs irregular use) (S8)
 - language and cultural diversity, with inclusion of Māori and First Nations Australians (S10)
- Informed consent will be collected from participants at the screening stage using the provided Participant Information and Consent Form (PICF). Focus groups will be audio recorded and digitally transcribed, as described in the PICF, and audio recordings may be provided to the client if all participants in that group consent.

SCREENING QUESTIONNAIRE

INTRODUCTION

[FOR Australia: Cnrstone/ FOR NZ: Prime Research] is recruiting participants for a research project about labelling on food.

The study is being undertaken by Heartward Strategic on behalf of Food Standards Australia New Zealand (FSANZ), which is the government body responsible for developing food regulations in Australia and New Zealand. The research will be used to inform potential changes to food labelling in Australia and New Zealand.

We are looking for a range of different people to participate in an online focus group to share your views and opinions. The group will run for 1.5 hours and there is nothing you would need to do to prepare for this focus group. Participants will receive a \$100 gift card as a token of thanks for participating.

There are some screening questions we need to ask to see if you qualify as one of the people we are looking to include in the research. If you qualify, we will provide a more detailed information sheet about the research project and you will be asked to confirm that you consent to participate in the research.

SCREENING QUESTIONS

- S.1 What is your age?
[ASK ALL. SINGLE RESPONSE]

Under 18	1	TERMINATE
18-24	2	ENSURE MIX ACROSS SAMPLE
25-34	3	
35-44	4	
45-54	5	
55-64	6	
65-74	7	
75 or older	8	

- S.2 How do you describe your gender?
This refers to your current gender, which may be different to sex recorded at birth and may be different to what is indicated on legal documents.
[ASK ALL. SINGLE RESPONSE]

A man or male	1	ENSURE REPRESENTATION ACROSS SAMPLE, AIM FOR MINIMUM 2 AND MAX 4 IDENTIFYING AS MAN/MALE PER GROUP
A woman or female	2	
Non-binary	3	
A different term (Please specify)	4	

- S.3 Where do you live?
[SINGLE RESPONSE]

[IF AUSTRALIA:]

NSW / ACT	1	ENSURE MIX ACROSS SAMPLE
VIC / TAS	2	
QLD	3	
SA / NT	4	
WA	5	

[IF NZ:]

Upper North Island	1	ENSURE MIX ACROSS SAMPLE
Lower North Island	2	
South Island	3	

S.4 Is the location where you live...?
[ASK ALL. SINGLE RESPONSE]

a major city	1	ENSURE MIX ACROSS SAMPLE
a regional or rural area	2	
remote	3	

S.5 How much of the food shopping do you have responsibility for in your household?
[ASK ALL. SINGLE RESPONSE]

I do all or the majority of the food shopping for my household	1	ENSURE MIX ACROSS SAMPLE
I share the food shopping with someone else	2	
Someone else does all or the majority of food shopping for my household	3	TERMINATE

S.6 Do you currently work in any of the following industries?
[ASK ALL. MULTI RESPONSE]

Market research	1	TERMINATE
Food primary production	2	
Food manufacturing	3	
Food retailing	4	
Food related public health advocacy	5	
Food policy or regulation	6	
Another industry	7	CONTINUE

S.7 What is the highest level of formal education you have completed or are in the process of completing? **[ASK ALL. SINGLE RESPONSE]**

High school	1	COUNTS AS 'NO UNI EDUCATION'
Vocational/trade qualification	2	
Undergraduate university degree	3	COUNTS AS 'UNI EDUCATION'
Postgraduate university degree	4	

S.8 How often, if at all, do you look at the nutritional information on food packaging or containers when you are food shopping? [ASK ALL. SINGLE RESPONSE]

Always	1	ENSURE MIX ACROSS SAMPLE
Most times	2	
Sometimes	3	
Rarely	4	
Never	5	TERMINATE

S.9 How often do you try to limit the amount of fats, sugar and sodium in your diet? [ASK ALL. SINGLE RESPONSE PER ROW]

		Always	Mostly	Occasionally	Never	ENSURE MIX OF RESPONSES RE SUGAR ACROSS SAMPLE - AIM FOR A MIX IN EACH GROUP
a	Fats	1	2	3	4	
b	Sugar	1	2	3	4	
c	Sodium	1	2	3	4	

S.10 How would you describe your cultural background?
Please select all that apply [ASK ALL. MULTI RESPONSE]

[IF AUSTRALIA:]

Aboriginal and/or Torres Strait Islander	1	ENSURE MIN 2 ACROSS SAMPLE ENSURE MIX OF CULTURAL BACKGROUNDS ACROSS SAMPLE
English	2	
Irish	3	
Scottish	4	
Chinese	5	
Italian	6	
German	7	
Indian	8	
Greek	9	
Dutch	10	
Australian	11	
Other (please specify):	12	

[IF NZ:]

Māori	1	ENSURE MIN 7 ACROSS SAMPLE ENSURE MIX OF CULTURAL BACKGROUNDS ACROSS SAMPLE
New Zealand European	2	
Pacific Islander	3	
Chinese	4	
Indian	5	
Other (please specify):	6	

S.11 Do any of the following currently affect the food choices you make for you or your household?

Please select all that apply. [ASK ALL. MULTI RESPONSE, EXCEPT IF 99 SELECTED]

Food allergy or food intolerance	1	<i>FOR CLASSIFICATION ONLY, NO QUOTAS</i>
Digestive concerns such as coeliac disease, irritable bowel syndrome, etc.	2	
Other diet-related health concerns such as diabetes, heart disease, high blood pressure, etc.	3	
Pregnancy or breast feeding	4	
Looking to lose weight and/or maintain a healthy weight	5	
Vegetarian or vegan	6	
Religious beliefs that affect food choices	7	
Training for sports that affects food choices	8	
Other things about you or your household that affect food choices (Please specify)	9	
None of the above	99	

S.12 Are you currently...?

Please select the one response that most applies. [ASK ALL. SINGLE RESPONSE]

Employed full time	1	<i>FOR CLASSIFICATION ONLY, NO QUOTAS</i>
Employed part time or casual	2	
Self-employed / business owner	3	
Unpaid caregiver/ home duties	4	
Not employed	5	
Retired	6	
Studying	7	
Something else (please specify)	8	

S.13 Which of these best describes your current household?

Please select the one response that most applies.

[ASK ALL. SINGLE RESPONSE]

Live alone	1	FOR CLASSIFICATION ONLY, NO QUOTAS
Live with flatmates/friends	2	
Live with a partner/spouse	3	
Live with a partner/spouse and children	4	
Live with children	5	
Multi-generational family - grandparent(s), parent(s) and children living together	6	
Other (please specify)	7	

RECRUIT TO GROUP IF THIS PERSON QUALIFIES.

PARTICIPANT INFORMATION AND CONSENT FORM

INFORMATION SHEET

You are invited to participate in focus group research about labelling on food. The study is being undertaken by Heartward Strategic on behalf of Food Standards Australia New Zealand (FSANZ), which is the government body responsible for developing food regulations in Australia and New Zealand. The research will be used to inform potential changes to food labelling in Australia and New Zealand.

Why am I being asked to participate?

You have been invited to participate as you are over 18 years old, and are a primary food shopper in your household.

What will I be asked to do?

You will be asked to participate in an online focus group run via Zoom. Focus group discussions involve a small group of people coming together to talk openly about their views and experiences around a certain topic. In this study, the focus groups will explore how you use and understand nutrition information on food labels, and to compare different ways of providing nutrition information.

The focus groups will involve 5–7 other participants, who will be joining remotely from various locations around Australia/New Zealand. One of the researchers will lead the focus group discussion, enabling each participant to share their thoughts and experiences. During the discussion you will be encouraged to not only share your own views and experiences but also to comment kindly on remarks made by other participants. You do not have to answer every single question, but you will be encouraged to participate in the discussion. It is important to remember that there are no right or wrong answers but rather different points of view. So, feel free to share your opinion even if it differs from what others have said.

How much time will the project take?

Your focus group will run for up to 1.5 hours. You will be emailed an \$100 gift card at the end of the focus group as a token of thanks for participating. There will be no follow-up contact with the researchers after attending the focus group, apart from being sent a copy of the final report if you are interested in this. You will be asked to join to the Zoom call early to make sure you are set up before the meeting starts.

Are there any risks associated with participating in this project?

There are no foreseeable risks associated with taking part in this study other than the inconvenience associated with taking time out of your day to attend the focus group discussion. There are no wrong or right answers, as we are interested in your views and experiences.

There will be no pressure to answer every single question and every effort will be made to establish a comfortable and friendly group environment.

What are the benefits of the research project?

While individuals may not directly benefit from participating in this study, the results may be used to improve food labelling for Australian and New Zealander consumers.

Can I withdraw from the project?

Participation in this project is completely voluntary. If you agree to participate, you can withdraw from the study at any time without any explanation.

How will the information be collected?

The focus group will be facilitated by a Heartward Strategic moderator. The discussion will be audio recorded and may be viewed by other members of the research team including from FSANZ. The recording and any transcript made from it will not include any identifying details. This research will be carried out in compliance with the Privacy Act and The Research Society's Code of Professional Behaviour. Any information you provide will be used for research purposes only. Your identity will be kept confidential.

What will happen to my information?

The results from this study will be published in a report on FSANZ's website, and may also be published in peer-reviewed journals and presented at professional meetings. While the final report may contain some de-identified verbatim quotes from project participants, no participants in this project will be identifiable through any reporting. Neither your name nor any other identifying information will appear on any research documents. The study data and records will be kept on secure servers located in Australia. De-identified transcripts and audio recordings may be made available to FSANZ. There is no intention to use the transcripts or audio-recordings from this project in future research.

Who do I contact if I have questions or concerns about the project?

If you have any questions about the research, please feel free to contact: REDACTED

CONSENT FORM

1. I have read the above information and agree to take part in the following research project:
Title: Food Labelling Focus Groups
2. I have had the project, so far as it affects me, fully explained to my satisfaction and my consent is given freely. I understand I have the opportunity to ask any questions to the researchers prior to the focus group.
3. I understand the purpose of the research project and it has also been explained that my involvement may not be of any direct benefit to me.
4. I have been informed that, while information gained during the study may be published, I will not be identified and my personal inputs will not be divulged.
5. I understand that I am free to withdraw from the project at any time.
6. I agree to the interview being audio recorded.
Yes No
7. I agree to the audio recording being provided to Food Standards Australia New Zealand.
Yes No
8. I am aware that I should keep a copy of this Consent Form, when completed, and the attached Information Sheet.

Participant to complete:

Name	Signature	Date (dd/mm/yy)

FOCUS GROUP DISCUSSION GUIDE

Introduction (5-7 mins)	
<i>Welcome</i>	<p>Hello and welcome to today's focus group, where we will be talking about food labelling. My name is [name], I am a researcher from Heartward Strategic and I will be facilitating today's session on behalf of Food Standards Australia New Zealand.</p> <p>Thank you for agreeing to be with us today. Your insights as Australian/New Zealand consumers will provide valuable information to inform potential changes to food labelling.</p> <p>Today we are going to discuss nutrition information and how this is presented on food labels. The session will take no more than 90 minutes.</p>
<i>Housekeeping</i>	<p>Firstly, everyone's perspective in this room is important. There are no wrong answers, just differing points of view. I'd ask that everyone be respectful and listen to other people's thoughts, but please feel free to disagree and discuss. We are interested in both positive and negative views.</p> <p>I want to make sure everyone has the opportunity to share their views today, so I may ask you for your opinion at certain points or ask that we move on to allow others time to answer.</p> <p>Please feel free to respond directly to each other. We want to have a conversation here today, I am just here to facilitate.</p>
<i>Recording and confidentiality</i>	<p>We will be recording the session today to make sure we don't miss any of your comments. We'd appreciate it if you try to avoid talking at the same time as someone else, as this can make it difficult to hear you now and also to understand the recording.</p> <p>This research is being carried out in compliance with the Privacy Act. None of your names or identifying details will be used in our reports or will be able to be traced back to you in any other way. The results from this study will form a report back to Food Standards Australia New Zealand, which will be published online and may be used in academic articles.</p> <p>So at our end, we will keep things confidential, but you are all on the call today, so please consider your own need for privacy in what details you share, and be aware that others will want you to keep their stories, ideas and information confidential.</p> <p>You will have received and signed an informed consent form when you agreed to participate in this study. Can I confirm, before we begin, that everyone here is still comfortable to participate?</p> <p>Are there any other questions about all of that before we get started?</p>

<p><i>Zoom orientation</i></p>	<p>How familiar are you with Zoom? Right now check that you have your 'view' set to gallery, so we can see each other. In today's group I will be showing you some images and also running some polls. I'll give you instructions as we go. Please ask about anything related to zoom if you're not sure. And if you have technical difficulties, contact City Group Rooms by phone or email. You will see the phone number on the screen for technical support, please make a note of it somewhere handy now in the unlikely event that you drop out of Zoom and cannot rejoin or need technical help.</p> <p>In general, when contributing, we need you to speak your responses to the group, but if you are waiting to speak you can 'raise your hand' or if think you'll forget, you can type something in the group chat.</p>
<p><i>Ice breaker</i></p>	<p>Let's start by getting to know each other a little. We will go around the group and if you could please tell us your name and your favourite food.</p>

QUESTION 1 (10 mins)

<p><i>Purpose: Identify contextual information about how and why participants utilise nutrition information on food labels and how consumers use and value 'sugars' information in the NIP.</i></p>	<p>I understand all of you here today do quite a bit of the food shopping for your household. When doing the food shopping, what are some of the things you look for on the label/packaging?</p> <p>SHARE SCREEN</p> <p>SHOW NIP IMAGE WITH ONLY 'SUGARS' (CURRENT FORMAT). HAVE PARTICIPANTS ADJUST ZOOM TO SEE IMAGE AND GROUP CLEARLY).</p> <table border="1" data-bbox="1187 1111 1428 1335"> <thead> <tr> <th colspan="3">NUTRITION INFORMATION</th> </tr> <tr> <td>Servings per package:</td> <td>6.3</td> <td>Serving size: 160g</td> </tr> <tr> <th></th> <th>Average Quantity per Serving</th> <th>Average Quantity per 100g</th> </tr> </thead> <tbody> <tr> <td>Energy</td> <td>571kJ</td> <td>357kJ</td> </tr> <tr> <td>Protein</td> <td>7.0g</td> <td>4.4g</td> </tr> <tr> <td>Fat, total</td> <td>3.0g</td> <td>1.9g</td> </tr> <tr> <td>- saturated</td> <td>1.9g</td> <td>1.2g</td> </tr> <tr> <td>Carbohydrate</td> <td>20.0g</td> <td>12.5g</td> </tr> <tr> <td>- sugars</td> <td>19.4g</td> <td>12.2g</td> </tr> <tr> <td>Sodium</td> <td>90mg</td> <td>56mg</td> </tr> </tbody> </table> <p>You may have seen one of these on food labels before. They're called Nutrition Information Panels, or N-I-P for short, and they're required to be displayed on most packaged food. Do any of you use the NIP when shopping? What do you look for on it?</p> <p>NIPs intend to provide you with information about the amount of different nutrients in food. One of the nutrients listed in the NIP is sugars. Do you use this information about sugars?</p> <p>Probing questions:</p> <ul style="list-style-type: none"> • [If no] Why don't you use sugar information? • [If yes], When do you find this information useful? For any specific products? • Does this provide you with enough information about sugars? 	NUTRITION INFORMATION			Servings per package:	6.3	Serving size: 160g		Average Quantity per Serving	Average Quantity per 100g	Energy	571kJ	357kJ	Protein	7.0g	4.4g	Fat, total	3.0g	1.9g	- saturated	1.9g	1.2g	Carbohydrate	20.0g	12.5g	- sugars	19.4g	12.2g	Sodium	90mg	56mg
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QUESTION 2 (10 mins)

Purpose: Identify how consumers understand, value, and whether they think they would use 'added sugars' information in the NIP.

This NIP is different to the last one you saw, because it contains some extra information about 'added sugars' that Food Standards Australia New Zealand is thinking about including.

NUTRITION INFORMATION		
	Average Quantity per Serving	Average Quantity per 100g
Energy	571kJ	357kJ
Protein	7.0g	4.4g
Fat, total	3.0g	1.9g
- saturated	1.9g	1.2g
Carbohydrate	20.0g	12.5g
- sugars, total	19.4g	12.2g
- added sugars	10.9g	6.8g
Sodium	90mg	56mg

SHOW NIP IMAGE WITH 'TOTAL SUGARS' AND 'ADDED SUGARS' (TEST FORMAT)

If you saw 'added sugars' in the NIP on a food label, what do you think it would mean? I'd like you to first type your initial thoughts in response to this poll, then we can discuss as a group.

LAUNCH 'NIP' POLL

CLOSE POLL AND DISCUSS AS A GROUP

Thank you for your responses. Now I'd like to discuss as a group.

Probing questions:

- Would anyone like to share what they thought 'added sugars' means?
- How do you think 'added sugars' might differ from 'sugars, total'?
- Would you use 'added sugars' information if it was on the NIP? If so, how?
- When do you think you would find this information useful? For any specific products?

QUESTION 3 (10 mins)

Purpose: Identify how consumers understand added sugars info in along with other info typically available on food labels, in particular, total sugars content and ingredients list. Reveal 'added sugars' is perceived

I'm now going to show you some different kinds of labels for specific food products. Even though you may not usually purchase these items, please imagine you are considering buying them for your household.

The first one is a box of crackers.

SHOW CRACKERS IMAGE WITH 'TOTAL SUGARS' AND 'ADDED SUGARS' (TEST FORMAT)



to be additional to, or a component of 'sugars, total'.

Highlight how consumers understand and value sugar info when the values for 'sugars, total' and 'added sugars' are the same (product does not include sugar from fruit/veg sources).

On one side you can see the front of the label, and on the other side you can see the back. First we will do a quick poll, which will ask how much sugar you think is in this product per serving.

LAUNCH 'SUGAR' POLL

CLOSE POLL AND DISCUSS AS A GROUP

Thank you for your responses. Now I'd like to discuss as a group, what does the information on this label tell you about sugar in these crackers?

Probing questions:

- Which parts of the label did you use to identify that?
- Are there other parts of the label which tell you something about sugar?
 - Did you look at this? Why/why not?
- Why do you think the amount of 'sugars, total' and 'added sugars' are the same (i.e. 6g per 100g)?
- How useful do you find the information about sugar on this label?

STOP SCREEN SHARE

QUESTION 4 (10 mins)

Purpose:

Identify how consumers understand added sugar info on single ingredient foods (incl foods that may be defined as an added sugar, when sold on their own e.g. honey, pure maple syrup, 100% juice).

Provide insight into whether or 'natural' sugars are perceived as contributing to 'added sugars', and whether these sugars being included may

The next product is a jar of honey. Before I show you the image, what would you expect a jar of honey to show on the NIP about 'added sugars'? I'd like you to first type your initial thoughts in response to this poll, then we can discuss as a group.

LAUNCH 'HONEY' POLL

CLOSE POLL AND DISCUSS AS A GROUP

Thanks for those initial thoughts. Now let's discuss, what would you expect to see in the nutrition information panel for 'added sugars' on a jar of honey?

SHARE SCREEN

SHOW HONEY IMAGE WITH SAME VALUE FOR 'SUGARS, TOTAL' AND 'ADDED SUGARS'



Now here is an image of what it could look like. Like last time, on one side you can see the front of the label, and on the other side you can see the back. What does looking at the information on this label tell you about sugars for this jar of honey?

Probing questions:

- Why do you think the amount of 'sugars, total' and 'added sugars' are the same (i.e. 75g per 100 g)?

impact how 'added sugars' info is valued.

- Why do you think 'added sugars' is listed on this label?
- How useful do you find the information about sugars on this label?

QUESTION 5 (10 mins)

Purpose:

Highlight how consumers may understand and use sugars information when added and total sugars are different.

Provide insight into whether consumers perceive inherent or 'natural' sugars (from fruit and vegetable products) as contributing to 'added sugars', and whether 'natural' sugars being included would change how 'added sugars' info is valued.

Investigate consumer responses to the same ingredients contributing added sugars in one product, but not in another.

Identify whether presenting no or low levels of added sugars in the NIP creates misleading health perceptions for high sugar foods (i.e. will products with lower added sugars be considered healthier in respect of sugar, even when total sugar is higher).

Will low or no added sugars impact

Now I am going to show you two different fruit purees. One has apple and banana puree with oats, and one just has apple puree. I'd like you to compare the sugar in these products and tell me how healthy they each seem to you in terms of sugar. I'd like you to first indicate your thoughts in response to this poll, then we can discuss as a group.

ROTATION A

SHOW PUREE COMPARISON IMAGE

LAUNCH PUREE Q1

CLOSE POLL

LAUNCH PUREE Q2

CLOSE POLL AND DISCUSS AS A GROUP



ROTATION B

SHOW PUREE COMPARISON IMAGE

LAUNCH PUREE Q1

CLOSE POLL

LAUNCH PUREE Q2

CLOSE POLL AND DISCUSS AS A GROUP



Probing questions (ROTATION A AND B):

- Does anyone want to share their thoughts on the healthiness of these products in terms of sugar?
- What information on the labels did you use when thinking about their healthiness in terms of sugar?
- Why do you think the apple puree packet has '0g added sugars', while the other doesn't?
- Which ingredients do you think contributed to the different sugar values on the labels?

perceptions of a product as healthy overall – i.e. because a product has low added sugars = healthy overall.

- How do you find comparing the sugar content in these products? Was it easy, or hard? What made it easy or hard?
- How useful do you find the information about sugar on these labels?

QUESTION 6 (10 mins)

Purpose:
Identify how consumers may understand sugars information on single ingredient foods, which do not show an added sugars line in the NIP, and how consumers may compare these foods to similar ones which do show an amount of added sugars in the NIP (does this impact product comparison within the same food category).
Identify whether not showing an added sugars line may increase perceptions of products as healthy in terms of sugar, relative to similar products that do list added sugar.

Now I am going to show you two different fruit juice products. Again, for each one there is a poll question I'd like you to answer before we move to the next one.

ROTATION A

SHOW JUICE COMPARISON IMAGE

LAUNCH JUICE Q1

CLOSE POLL

LAUNCH JUICE Q2

CLOSE POLL AND DISCUSS AS A GROUP



ROTATION B

SHOW JUICE COMPARISON IMAGE

LAUNCH JUICE Q1

CLOSE POLL

LAUNCH JUICE Q2

CLOSE POLL AND DISCUSS AS A GROUP



Probing questions (ROTATION A AND B):

- Does anyone want to share their thoughts on the healthiness of these products in terms of sugar?
- What information on the labels did you use when thinking about their healthiness in terms of sugar?
- Why do you think one of the labels lists 'added sugars', while the other doesn't?
- How do you find comparing the sugar content in these products? Was it easy, or hard? What made it easy or hard?

	<ul style="list-style-type: none"> How useful do you find the information about sugar on these labels? <p>STOP SCREEN SHARE</p>
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QUESTION 7 (10 mins)

<p><i>Purpose: Provide participants with an opportunity to outline any key benefits or difficulties they experienced when using sugars labelling, as well as potential improvements.</i></p>	<p>Thanks so much for all of your insights so far. We are getting close to the end now, on our second last question. We have now looked at a number of examples of sugars labelling.</p> <p>We'd like to hear your overall thoughts, and any ideas you have about what you'd find most helpful to understand sugars information on food. Is there any other information you think would be helpful?</p> <p>Probing questions:</p> <ul style="list-style-type: none"> Did you find the inclusion of 'added sugars' information on the NIP to be helpful or useful? Are there examples where it would be more or less useful? Would you want 'added sugars' to be listed on the NIP? Is there anything else that would make sugars information on the NIP more useful to you? <p>SCREEN SHARE</p> <p>ONCE ALL IDEAS COLLECTED, SHOW NIP IMAGE WITH 'HIGH' (TEST FORMAT2)</p> <p>Probing questions:</p> <ul style="list-style-type: none"> Would something like HIGH text next to sugars be helpful? What do you think it means? <p>STOP SCREEN SHARE</p>
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NUTRITION INFORMATION		
Servings per package:	6.3	Serving size: 160g
	Average Quantity per Serving	Average Quantity per 100g
Energy	571kJ	357kJ
Protein	7.0g	4.4g
Fat, total	3.0g	1.9g
-saturated	1.9g	1.2g
Carbohydrate	20.0g	12.5g
-sugars	19.4g	HIGH 12.2g
Sodium	90mg	56mg

QUESTION 8 (10 mins)

<p><i>Purpose: Debrief participants, minimise any confusion following the focus group.</i></p> <p><i>Canvas ideas about how to manage complexities discussed in the focus groups.</i></p>	<p>After seeing the example labels today, you might be wondering what 'added sugars' actually are and what the examples were trying to show.</p> <p>The Australian and New Zealand Dietary Guidelines recommend that people limit the amount of 'added sugars' in their diet. However, they also recommend that people limit foods that are high in natural sugar such as fruit juice and dried fruit. This has caused quite a lot of debate about what should be counted as 'added sugars' in the NIP to help people follow the advice in the dietary guidelines.</p> <p>A lot of the foods and ingredients we think of as sugar, like white or brown sugar, would be counted as 'added sugars' in the NIP. Some naturally occurring sugars, like the sugar in honey, would also be counted as 'added sugars' when they are added to another food, such a cake or a muesli bar, as they can be used to sweeten foods.</p>
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<p>May provide insight into whether education could help understanding of added sugar labelling, and if greater understanding impacts views on whether 'added sugars' in NIP is useful</p>	<p>Food Standards Australia New Zealand is considering whether natural sugars from processed fruits and vegetables, like purees or juices, should also be counted as 'added sugars' when food manufacturers add them to a product to sweeten them. Does anyone have any thoughts about this?</p> <p>[If needed: Processed fruit and vegetables are things like purees, juices, or dried fruit or veg. This processing may have concentrated the sugar by removing the water from the fruit (e.g. dried fruit), or removed the beneficial fibre (e.g. juice which may not contain the beneficial fibre of the whole fruit)]</p> <p>Probing questions:</p> <ul style="list-style-type: none"> • Do you think 'natural sugars' from processed fruits and vegetables added to a food product should be counted as 'added sugars'? • Would including sugars from processed fruit and vegetables as 'added sugars' make 'added sugars' labelling in the NIP more or less useful to you? <p>Another problem with labelling 'added sugars' in the NIP is what to do when a food only has one ingredient, like the honey and 100% fruit juice we discussed, or even a bag of sugar. If these were added to another food, they could be counted as 'added sugars' in the NIP. But what about when they're sold as the food product on their own with nothing 'added' to them?</p> <p>One option is to label the sugar content of these foods as 'added sugars'. This is what you saw in the honey example. Another option is to not label these foods as 'added sugars', either by putting 0 grams (like the 100% apple puree), or by not having an 'added sugars' line in the NIP at all (like the 100% orange juice). As we saw today, all of these options can be confusing. Does anyone have any ideas about what might be the best way to label these types of products which only have one ingredient with nothing 'added'?</p> <p>Probing questions:</p> <ul style="list-style-type: none"> • What about when a product only has two ingredients, like an orange and passion fruit juice? Or an apple and banana puree? • Does knowing more about 'added sugars' change your views on whether it would be useful to help you make food choices?
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Conclusion and debrief (3-5 mins)

<p>Recap and thanks</p>	<p>BRIEFLY SUMMARISE KEY POINTS RAISED.</p> <p>Is this an accurate reflection of the discussion today?</p> <p>Is there anything we missed or that you would like to raise about sugar and food labelling?</p>
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	<p>That brings us to the end of our session. Thank you very much for your participation. Your insights will be incredibly valuable for Food Standards Australia New Zealand in deciding whether and how to improve sugar information on food labels.</p> <p>If anyone has any questions about sugar and added sugar that we were unable to answer during the session, we would be happy to discuss those now.</p> <p>I'd like to remind you to please not share any of the stories or perspectives that were discussed today outside this room in order to be respectful of other participants' privacy.</p> <p>If you are interested in seeing the results of the study, you can sign up to receive the Food Standards Australia New Zealand Newsletter, which will notify you when then results are published on their website. To sign up, go to https://www.foodstandards.gov.au/subscribe.</p>
<p><i>Follow up/ debriefing</i></p>	<p>PROVIDE DEBRIEFING SHEET (AUS OR NZ SPECIFIC) IN ZOOM CHAT</p> <p>IF REQUIRED CAN ALSO SAY:</p> <p>If any of the discussions today raised some issues for you, please reach out to us, or to local support services.</p> <p>In Australia:</p> <ul style="list-style-type: none"> • The butterfly foundation can assist with concerns relating to eating disorders or body image. Go to https://butterfly.org.au/ to chat online or in person, or access other support services. • The Australian Dietary Guidelines can also provide advice around healthy eating. Go to The Australian Dietary Guidelines Australian Government Department of Health and Aged Care <p>In New Zealand:</p> <ul style="list-style-type: none"> • The Eating Disorders Association of New Zealand can assist with concerns relating to eating disorders. Go to https://www.ed.org.nz/ to access their helpline number and other support services. • The New Zealand Dietary Guidelines can also provide advice around healthy eating. Go to Eating and activity guidelines – Te Whatu Ora - Health New Zealand

PARTICIPANT DEBRIEF SHEET - AUSTRALIA

Food Standards Australia New Zealand (FSANZ) would like to thank you for participating in today's focus group about 'added sugars'. The perspectives you shared will be very valuable in deciding whether and how to improve sugar information on food labels.

If you are interested in seeing the results of the study, you can sign up to receive the FSANZ Newsletter, which will notify you when the report is published. To sign up, go to <https://www.foodstandards.gov.au/subscribe>.

For more information on 'added sugars' labelling work, you can also visit <https://www.foodstandards.gov.au/food-standards-code/proposals/Proposal-P1058-Nutrition-labelling-about-added-sugars>.

Why is the study being undertaken?

The Australian and New Zealand Dietary Guidelines recommend people limit their intake of food and drinks containing 'added sugars' as part of a healthy diet. Currently, 'sugars' is required to be listed in the nutrition information panel (NIP) on the label of most packaged foods. FSANZ is considering including 'added sugars' information to the NIP to provide consumers with more information about sugars in food, to help them make informed choices.

What are 'added sugars'?

FSANZ is considering what ingredients or foods would count towards 'added sugars' if it was to be labelled in the NIP. This would include the types of ingredients we generally think of as sugar, like white or brown sugar. However, dietary guidelines also recommend limiting foods such as fruit juice and dried fruit as they are high in naturally occurring sugars. FSANZ is also considering whether counting natural sugars from processed fruit and vegetables as 'added sugars' would help consumers to make informed food choices in line with the advice in dietary guidelines.

How will this focus group help?

Different definitions of 'added sugars' lead to different types of labelling in the NIP. The labels presented in the focus group were investigating different options for defining 'added sugars' and for labelling this information in the NIP, including some examples where 'added sugars' labelling might not be required. Your insights will help FSANZ to work out which options will be the easiest to use and understand.

If any of the discussions today raised some issues for you, please reach out to local supports:

- The Australian Dietary Guidelines can provide advice around healthy eating. Go to <https://www.health.gov.au/resources/publications/the-australian-dietary-guidelines?language=en>
- The Butterfly Foundation can assist with concerns relating to eating disorders or body image. Go to <https://butterfly.org.au/> to chat online or in person, or access other support services.

PARTICIPANT DEBRIEF SHEET - NEW ZEALAND

Food Standards Australia New Zealand (FSANZ) would like to thank you for participating in today's focus group about 'added sugars'. The perspectives you shared will be very valuable in deciding whether and how to improve sugar information on food labels.

If you are interested in seeing the results of the study, you can sign up to receive the FSANZ Newsletter, which will notify you when the report is published. To sign up, go to <https://www.foodstandards.gov.au/subscribe>.

For more information on 'added sugars' labelling work, you can also visit <https://www.foodstandards.gov.au/food-standards-code/proposals/Proposal-P1058-Nutrition-labelling-about-added-sugars>.

Why is the study being undertaken?

The Australian and New Zealand Dietary Guidelines recommend people limit their intake of food and drinks containing 'added sugars' as part of a healthy diet. Currently, 'sugars' is required to be listed in the nutrition information panel (NIP) on the label of most packaged foods. FSANZ is considering including 'added sugars' information to the NIP to provide consumers with more information about sugars in food, to help them make informed choices.

What are 'added sugars'?

FSANZ is considering what ingredients or foods would count towards 'added sugars' if it was to be labelled in the NIP. This would include the types of ingredients we generally think of as sugar, like white or brown sugar. However, dietary guidelines also recommend limiting foods such as fruit juice and dried fruit as they are high in naturally occurring sugars. FSANZ is also considering whether counting natural sugars from processed fruit and vegetables as 'added sugars' would help consumers to make informed food choices in line with the advice in dietary guidelines.

How will this focus group help?

Different definitions of 'added sugars' lead to different types of labelling in the NIP. The labels presented in the focus group were investigating different options for defining 'added sugars' and for labelling this information in the NIP, including some examples where 'added sugars' labelling might not be required. Your insights will help FSANZ to work out which options will be the easiest to use and understand.

If any of the discussions today raised some issues for you, please reach out to local supports:

- The New Zealand Dietary Guidelines can provide advice around healthy eating. Go to <https://www.health.govt.nz/publication/eating-and-activity-guidelines-new-zealand-adults>
- The Eating Disorders Association of New Zealand can assist with concerns relating to eating disorders. Go to <https://www.ed.org.nz/> to access their helpline number and other support services.

8. Appendix C: Focus group poll results

NIP POLL

NUTRITION INFORMATION		
Servings per package: 6.3		Serving size: 160g
	Average Quantity per Serving	Average Quantity per 100g
Energy	571kJ	357kJ
Protein	7.0g	4.4g
Fat, total	3.0g	1.9g
- saturated	1.9g	1.2g
Carbohydrate	20.0g	12.5g
- sugars, total	19.4g	12.2g
- added sugars	10.9g	6.8g
Sodium	90mg	56mg

Q. What do you think 'added sugars' in a nutrition information panel would mean?

Response #	Open-ended response
1	I would assume it meant extra sugar that had been added, so not naturally occurring
2	additional sugar outside of what naturally occurs in the raw ingredient e.g. sugar versus apple juice
3	Any sugar that is not naturally in the food when it is manufactured or grown.
4	I would assume it to be simple sugars like glucose that's added rather than natural sugar.
5	Added sugar is extra sugar that is added to the product. Sugar, could be what is naturally in the product.
6	I would think added sugars mean sugar added on top of whatever natural sugar already exists in the product.
7	Sugars that have been added (Corn syrup, golden syrup etc). Not naturally occurring sugars such as fructose
8	Artificial or "bad" sugar
9	refined sugars added to primary ingredient
10	None for me I just look at sugar only
11	It'd be great. Added versus natural sugar tells me a lot.
12	sugar added during processing by the manufacturer of this product
13	It would mean trouble. Because the added sugar would be a health risk and I would not prefer to buy if there is huge amount of added sugar on top of natural sugars.
14	Extra sugar the manufacturer has added for the purpose of taste/flavour.
15	extra sugars added to make it taste better than the ingredient sauce needs
16	additional sugar that has been added to the product
17	I'm somewhat confused by this label Says total, then added sugar (is this part of the total ?)
18	That the product has added sugar in the manufacture of the product. Whether that be natural or not sugars
19	Added sugars e.g. extra sugars separate to the product composition.
20	The added sugars / preservatives.
21	The amount of raw sugar added to a product. Sugar content after accounting for natural sugars contained within other ingredients.
22	not natural sugars
23	Letting people know that the product which normally has no sugar may have sugar

24	sugars added in different forms in addition to the natural sugar content of the food
25	Addition of things like Dextrose, Sucrose, etc to the product during the manufacturing process
26	more other ingredients
27	I would assume they were more processed sugars, I would definitely find it helpful to know as it would be a quick way to see if sugar had been added but I would assume the higher the number the less 'good' the food is for you.
28	Sugars which do not occur naturally in that food item
29	added artificial sugar or more sugar than was naturally in the product.
30	Sugar that has been added for flavour, opposed to naturally occurring from the ingredients. These would usually be refined sugar added
31	Artificial Sugars
32	It means there are some artificial sugar added to the product aside the natural sugar from the ingredients used to produce it and It gives me an extra sense of reasoning to how much sugar i will be consuming.
33	Sugar that isn't naturally contained in the food. sugar added to the product after food is made
34	not sure
35	added for flavouring
36	I think this is the sugar added to the product by the manufacturer, over and above the natural sugar found in the food.
37	the more I think about it the less sense it makes
38	added sweetener, different from natural sugars in the product
39	sugar added in addition to the natural sugar content to the food
40	I think this would mean that extra sugar products have been added to enhance flavour or whatever. This might be cane sugar or other sugars.
41	What the producer of the food has added to natural ingredients. This could be something like artificial flavouring.
42	products can have natural sugars eg fruit. Added sugar is on top of the naturally occurring sugar
43	sugar added in conjunction with natural sugars
44	That beyond natural sugars contained in the product the manufacturer has added extra on top of this.
45	Additional sugar added to the product
46	That as well as the natural sugar in the product the maker has added extra sweetener
47	If it's not natural sugar in the product (ie fruit), and has been separately added
48	additional sugar added from the natural sugar in the product ie fruit
49	sugars added while the processing of the food
50	I have no idea. it is too vague to even know what it is referring to
51	extra natural and processed sugars are added
52	not actually sugar but something along the lines of invented
53	Above necessary amount to sweeten the product
54	would that mean refined sugar
55	Adding additional sugar compared to the natural sugar in the product.
56	Absolute clarity
57	Sugar that is not naturally occurring within the food itself
58	sugars added to the existing main ingredient(s) of product during processing
59	the addition of processed sugar and natural sugars

60	extra sugar added on top of the sugar content that is already in a product. Total sugars is the total of all sugars, and the added sugar is the extra that they add in
61	I would assume it's sugar that has added during the manufacturing process.
62	Not natural - processed - EG. sweeteners or artificial flavours
63	like the actual sugar itself... not including sugars that are already in for example rice, fruit, etc.
64	Sugar added on top of the original ingredients
65	Anything above the core ingredients of the product
66	Sugar that does not occur naturally in raw ingredients such as fruit. E.g. extra sugar that is added to enhance the flavour of the product
67	Added sugars would mean these sugars are not naturally from the product itself but have been added to enhance/sweeten the product,
68	Sugar that has been added to make the product taste better because the natural sugar isn't enough for most people.

CRACKERS POLL



Q. How many grams of sugar is in ONE SERVING of this product?

Response option	Frequency (n)	%
1.5g	51	72%
16.5g	2	3%
3g	10	14%
6.0g	2	3%
No response	6	8%
Total	71	100%

HONEY POLL



Q. What would you expect the nutrition information panel to show for 'added sugars' on a jar of honey?

Response #	Open-ended response
1	I wouldn't expect honey to have sugar added
2	depends if flavoured or not - expect added in natural e.g. raw to be high but not added sugar but like an apple flavoured honey to have more as added?
3	I'd expect to see added sugars in a jar of honey
4	Considering that honey is seen as a naturally occurring sugar, it probably will have 0g of added sugars on its label.
5	0. I would assume there are no added sugars in honey. Pure honey is a natural product.
6	No added sugar
7	I would expect to see just a row for a sugar (not added sugars as well)
8	I expect the added sugar to be shown, but i would hope it wouldn't be there as it may discourage me to buy the product
9	assuming it is 100% pure honey I would expect no added sugars
10	Preservatives used in the honey
11	I agree that there ought not to be any added sugar to a product that's totally sweet naturally. I'd expect to see zero!!!
12	To show nil
13	There should not be any added sugar in Honey as it is naturally extracted and does not need any sugars. This would mean its processed commercially and no good to use.
14	0g. Honey is naturally occurring sugar. Wouldn't expect it to be "added" because it exists as sugar already. Calling it "added" feels misleading because although it might add more sugar to your meal you're using it in, it's not "added" in the sense of additional sugar in the manufacturing process.
15	nil, but if it was flavoured like smoky i would understand the sugar from additive ingredients
16	0g
17	what quantity has been addedif any
18	Nothing, I would assume the sugar is naturally occurring
19	sugar added sugar natural sugar
20	no added sugar
21	I would expect for them to show any addition sugar which was added to increase the sweetness of the honey after it had been refined or processed.
22	if there was more than natural sugar in the jar
23	No idea, I'm still struggling with grams and micrograms etc...
24	artificial sweeteners

25	Minimal to none
26	Natural 100%
27	I would expect the total sugar to be high, but I would expect / hope for the added sugars to be 0 (zero)
28	very low percentage if any
29	natural honey added sugar
30	zero
31	I would expect there wouldn't be any added sugars in honey
32	Zero
33	if there is added sugar other than the honey. Honey sometimes say 100% natural... but it doesn't say 100% natural HONEY
34	0%
35	zero nil
36	Zero
37	I would expect 0 because honey should be sweet enough
38	0 or no added sugar
39	natural sugar
40	I would expect it to show if the additives were honey products or some other sugar.
41	The added sugars should be relatively low percentage of total sugars
42	I would expect it to be zero
43	What type of sugar added such as white sugar
44	i would expect no added sugars.
45	Natural sugars and total sugar
46	no added sugar
47	No added sugar, but almost 100% total sugar
48	added honey - 0 or better to use 0%
49	no added sugar
50	total amount of sugars should be the same as added sugars
51	Natural sugars only
52	well if its natural honey there shouldn't be. I had bees for a long long time
53	no added sugars
54	why added sugar
55	Total Sugars, added sugars, natural sugars
56	That it would say no added sugars
57	The amount that has been added to the product that didn't naturally occur within the honey. Up to 50%.
58	there shouldn't be any added sugars
59	I would expect there to be no added sugars
60	honey is made up of a naturally occurring sugar so based on this I wouldn't expect there to be any added sugar of any kind. The only sugar in honey should be what comes in the product, and nothing more
61	I expect no more than 25%
62	I would not expect any added sugars to be present
63	for a label that says pure honey, 0
64	That there wouldn't be any
65	I wouldn't expect much or any added sugar because it has a large amount of natural sugar to begin with.
66	Zero - I would expect the sugar to be naturally occurring in honey.
67	I would expect the average serving size to have 10 grams of added sugars.

PUREE POLLS



PUREE POLL 1 - PRETEST

Q. How healthy does this puree product seem to you in terms of sugar? (1= very unhealthy to 5 = very healthy)

Response option	Apple Puree		Apple, Banana and Oats Puree	
	Frequency (n)	%	Frequency (n)	%
1= very unhealthy	1	7%	0	0%
2	0	0%	5	33%
3	5	33%	1	7%
4	1	7%	7	47%
5 = very healthy	8	53%	1	7%
Total	15	100%	15	100%

PUREE POLL 1 - MAIN STUDY

Q. If you wanted to buy a fruit puree product that was healthier in terms of sugar, which of these two products would you choose to purchase?

Response option	Frequency (n)	%
Apple Puree	30	54%
Apple, Banana and Oats Puree	22	39%
No response	4	7%
Total	56	100%

PUREE POLL 2

Q. Which of the two fruit puree products do you think has the most sugars in it?

Response option	Frequency (n)	%
Apple Puree	55	77%
Apple, Banana and Oats Puree	13	18%
No response	3	4%
Total	71	100%

JUICE POLLS



JUICE POLL 1 - PRETEST

Q. How healthy does this fruit juice product seem to you in terms of sugar? (1= very unhealthy to 5 = very healthy)

Response option	Orange		Orange & Passionfruit	
	Frequency (n)	%	Frequency (n)	%
1= very unhealthy	1	13%	0	27%
2	0	0%	5	27%
3	5	33%	1	27%
4	1	7%	7	20%
5 = very healthy	8	53%	1	0%
Total	15	100%	15	100%

JUICE POLL 1 - MAIN STUDY

Q. If you wanted to buy a fruit juice product that was healthier in terms of sugar, which of these two products would you choose to purchase?

Response option	Frequency (n)	%
Orange	18	32%
Orange & Passionfruit	36	64%
No response	6	11%
Total	56	100%

JUICE POLL 2

Q. Which of the two fruit juice products do you think has the most sugars in it?

Response option	Frequency (n)	%
Orange	61	86%
Orange & Passionfruit	8	11%
No response	2	3%
Total	71	100%

