



The European Consumers' Organisation

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Report on European Consumers' Perception of Foodstuffs Labelling

Results of Consumer Research conducted on behalf of BEUC from
February to April 2005

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Evropska potrošniška organizacija
Den Europeiske Forbrugerorganisasjonen

Euroopan Kuluttajaliitto
Europejska Organizacja Konsumentka
Ευρωπαϊκή Οργάνωση Καταναλωτών
Den Europæiske Forbrugerorganisation
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Introduction / Background

BEUC is a Brussels based federation of 40 independent national consumer organisations from the European Union (EU), accession and European Economic Area (EEA) countries. Our job is to try to influence, in the consumer interest, the development of EU policy and to promote and defend the interests of all European consumers.

Currently, the European Commission is reviewing European legislation relating to food and nutrition labelling. In addition, proposals on nutrition and health claims and fortification (the addition of vitamins and minerals to foods) are going through the legislative process in the European Parliament and Council.

To allow consumer organisations to input constructively to these discussions BEUC commissioned, at the European level, consumer research into consumers' understanding of nutrition and food labelling. The BEUC survey followed similar research carried out in 2004 by the French member organisation, CLCV¹

The French study² was conducted to measure the impact on purchasing behaviour of the information included on food labels. Consumers generally have two ways of getting nutritional information on a product (the list of ingredients and the nutritional analysis table) and the research quantified the use of this regulatory information and examined the influence of advertising information.

The BEUC survey on labelling confirms that regulatory information as it is currently presented is used by approximately a third of consumers. However, consumers have difficulties in finding and understanding it, and a significant number of consumers rely more on marketing-oriented information such as claims: "Calcium rich", "Sodium Free", "Fat Free", "Light", etc...

Methodology

The survey was conducted in five European countries: Germany, Denmark, Spain, Hungary and Poland, and 600 people were interviewed in each country. It was undertaken by SPAD³, an institute for statistical studies, with the co-operation of national institutes in each country.

The sample size was chosen to be large enough to obtain representative results even on small parts of the population. The quota method ensures representativeness in each country and enables reliable comparisons. Although five countries were selected by BEUC in order to reflect a European diversity (Mediterranean, Northern and Eastern Europe), this survey should not be considered as representative of the whole of Europe.

¹ Consommation, Logement et Cadre de Vie, 17 rue Monsieur, F-75007 Paris

² http://europa.eu.int/comm/health/ph_determinants/life_style/nutrition/documents/ev_20041029_co05_en.pdf

³ DECISIA / SPAD, 11, rue des Petites Ecuries, F-75 010 Paris, www.decisia.fr

The people who took part in the survey were consumers responsible for doing the household food shopping and aged 18 years or over. These two criteria were established by asking a direct question to the interviewees. The interviews were face-to-face and took place in the home. Interviewees were shown different product examples, available in their country.

To ensure the representative nature of product consumers in Germany, the German quota involved more young adults than in other countries. To homogenise ages and make national results easier to compare, an adjustment was made to the German sample, which had on a slight impact on the results.

Interviews were conducted in February 2005 (weeks 6 & 7) in Poland, Spain, and Germany; in February 2005 (weeks 6, 7 & 8) in Denmark and in March / April 2005 (weeks 12, 13 & 14) in Hungary.

Respondents

3000 individuals were interviewed and of these approximately three-quarters were women. 70% of respondents were aged between 20 and 59 years, with 28% over 60.

Just under half of respondents were working (employed / self-employed), with under a third retired. Others fell into the categories of housewives, unemployed and students.

Educational levels, though expressed in different scales, according to each country's educational system, were divided into five groups from no diploma to university. All levels were more or less equally distributed in the sample, except for the University level, which only represented 12% of interviewees.

65% of respondents were either married or co-habiting and up to 69% of respondents had children. Of these, 40% had children under the age of 13 years, with a further 20% with children from 14 to 20 years.

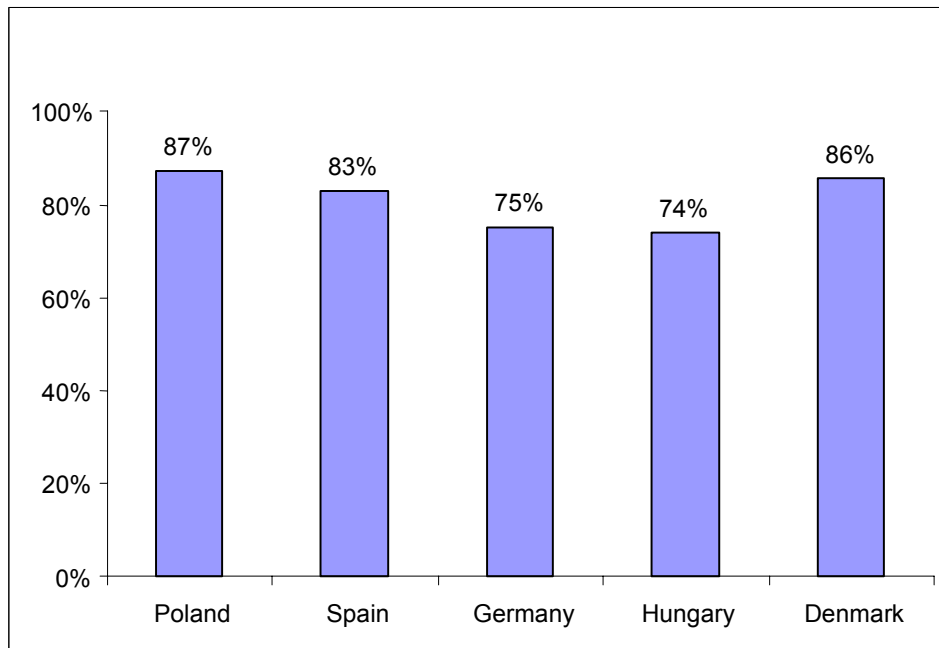
Only one-third of respondents practised sports or exercised and of these a majority exercised more than two hours per week.

Just over half of the respondents were classed as a normal weight (a BMI of between 18 and 25). 35% of respondents were overweight, 12% obese.

Interest in Nutrition

An interest in nutrition was generally quite high, with three-quarters of respondents declaring themselves to be very or sometimes interested in nutrition. When questioned about having nutritional information on the food label an even higher percentage (81%) replied positively (figure 1). This interest in nutrition was further highlighted with 71% of respondents wanting to have a balanced diet.

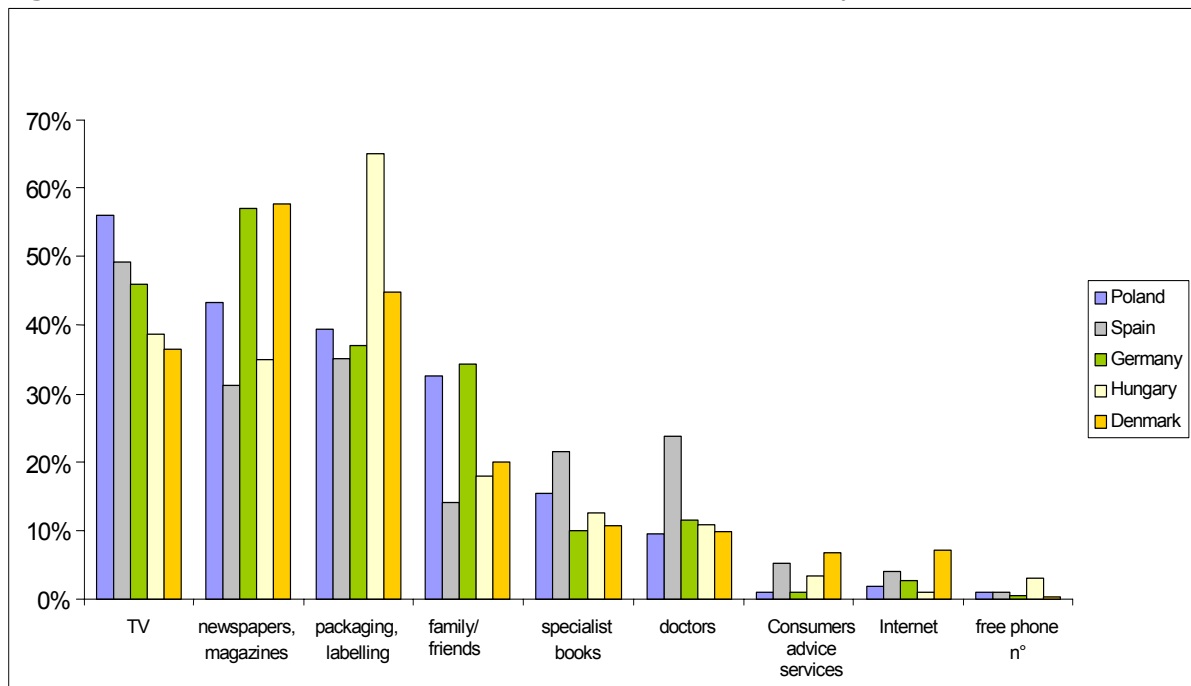
Figure 1: Percentage of interviewees wanting nutritional information on the label in each country



The nutritional information provided on the label is only one source of nutritional information for consumers. Television and the press are the main sources for consumers in all countries (figure 2).

Specialist sources, such as a doctor or nutritionist, and family or friends are also used but to a lesser extent. Other sources such as the Internet, free-phone numbers and consumer advise services are the least popular.

Figure 2: Main sources of information on nutrition in each country

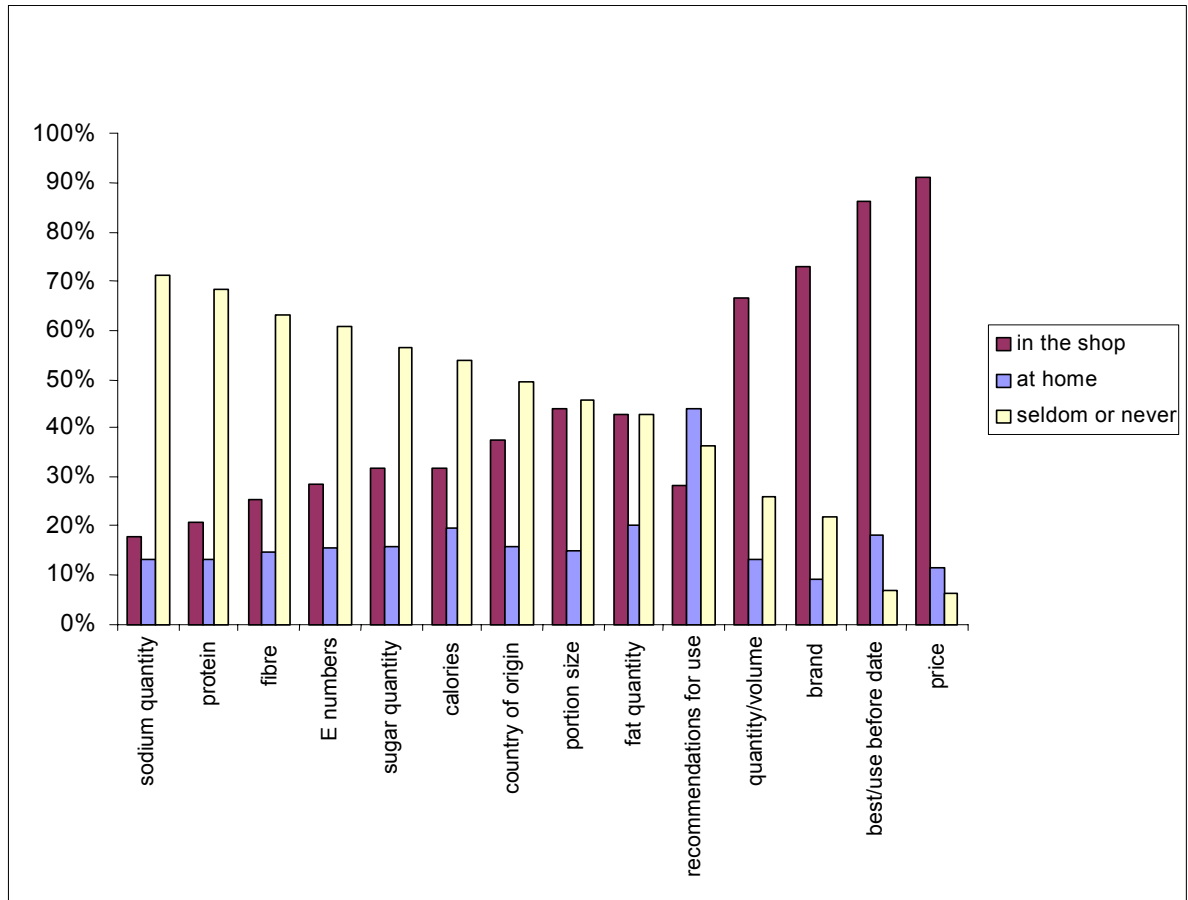


Labelling of foods

Although interested in nutrition, interviewees did not generally read the nutritional information. Information such as price, best before / use by date and brand name were the most read in the shop (figure 3).

Nutritional information was read by a small percentage of interviewees but portion size and fat quantity were read by over 50% of participants. Information on sodium / salt and additives was not read by many interviewees either in the shop or at home, despite the wide press coverage over the past few years in many European countries.

Figure 3: Which of the following information do you read, and where?



Considering that four-fifths of respondents shop either daily or more than once a week and spend less than 30 minutes, or one hour shopping, it is unsurprising that only certain product information is read in the shop.

Consumers do not appear to spend time at home reading the information on the label, except the recommendation for use. This could be related to the way nutritional information is presented.

Ingredient list

When questioned about reading the list of ingredients on food packages 38% of interviewees said they did so in the shop and over 25% declared that they never read it. This is consistent with the fact that 60% of interviewees found the list of ingredients difficult to locate and only 30% found the information provided easy to understand it is perhaps unsurprising.

Two-thirds of respondents would like to see the presentation of the list of ingredients improved, with increased letter size and improved clarity.

Nutritional analysis table

Currently, under EU legislation, the nutritional analysis table is not required on a food package unless a nutritional claim is made. The vast majority of interviewees wanted nutritional information to appear on the label but nearly 40% were not interested in the nutritional table as currently presented on food packages.

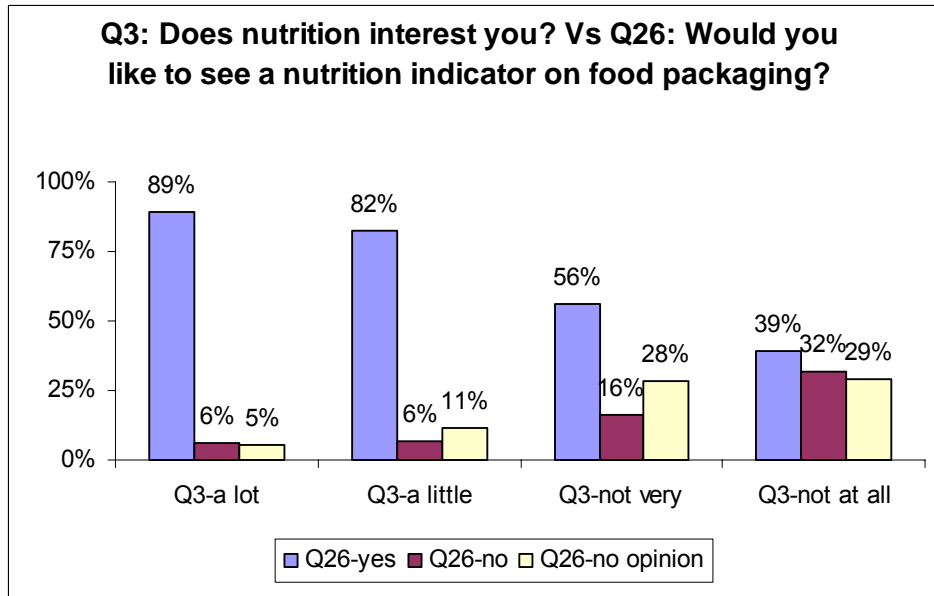
When questioned about reading the nutritional table only a third said they did so in the shop and slightly more at home. Consumers seemed to locate the nutritional analysis table more easily than the list of ingredients (only 20% found it difficult to locate and only 13% never looked for it). Of those who did look at the nutritional analysis table, two-thirds believed they understood it.

As for the list of ingredients a large proportion of interviewees would like to see improvements, such as to increase the size of the table to allow for it to be read more easily, and to use more commonly understood terms. Other improvements suggested were expressing nutritional values per serving size, referring to salt instead of sodium and to include recommended daily allowances (RDAs).

In addition to the improvements suggested above, 77% of those who believe nutritional labelling should be improved would like to see an indicator on food packaging to highlight its nutritional quality. They agreed to a simplified labelling system to indicate whether fat, sugar or salt levels are high, medium or low on the front of pack.

Significantly, even consumers who declared not to be interested in nutrition would like to see this type of simplified labelling system on food packaging (figure 4).

Figure 4: Relationship between interest in nutrition and having a simplified labelling system to indicate the nutritional quality of a food



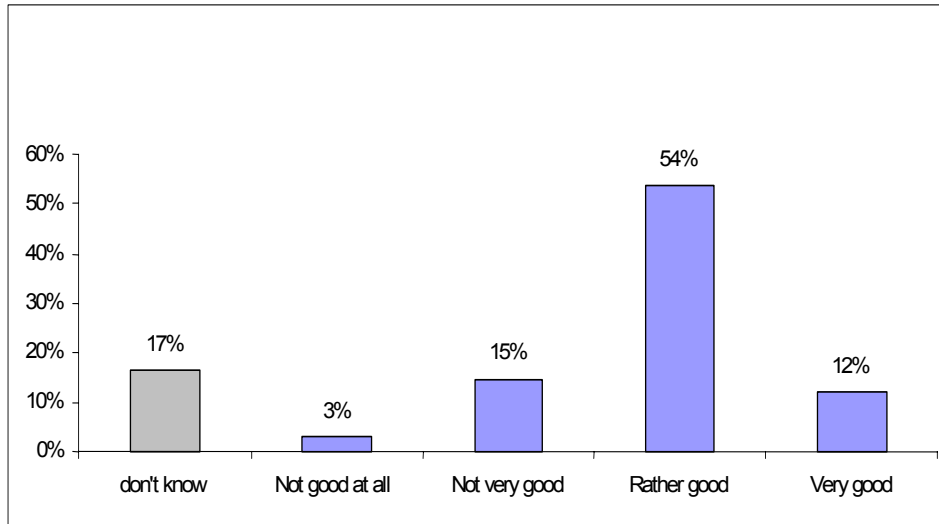
Nutritional knowledge

When interviewees were asked what nutritional information should be on the label the vast majority wanted information on fat, sugar, vitamins, cholesterol, carbohydrates, minerals, energy value, protein, fibre, sodium/salt, saturated fatty acids and unsaturated fatty acids. Information on trans-fatty acids and glycemic index was only mentioned by half or less of the respondents.

In this context it is important to note that consumers are inadequately informed about nutrition. For example, 84% of the interviewees could not correctly describe what carbohydrates are but due to their strong interest in nutrition they still indicated that carbohydrates should be on the label.

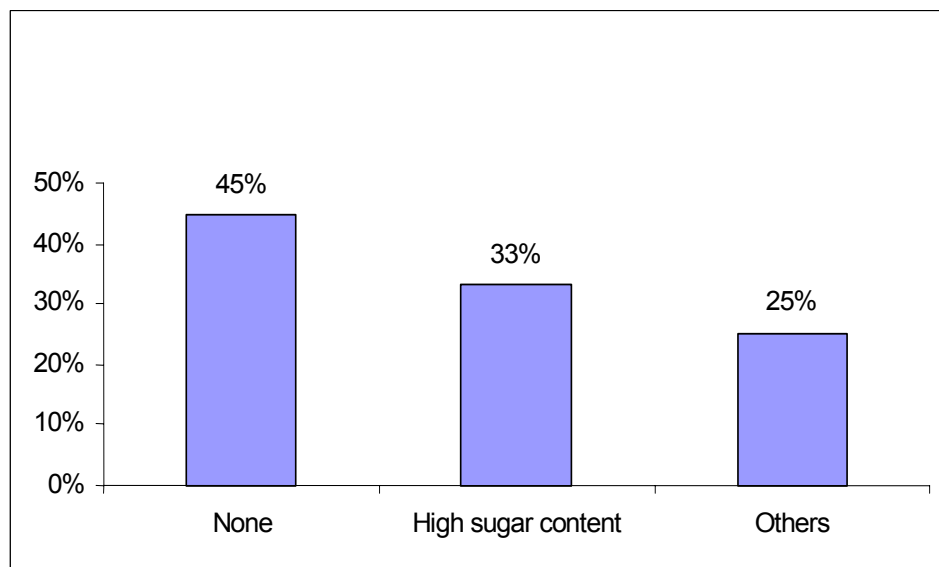
Moreover, the majority of interviewees were not equipped with sufficient information and knowledge to judge the nutritional quality of a product (figure 5). A product with a very high carbohydrate/sugar content (different in each country) was shown to the interviewees. 12% believed it was nutritionally very good and 54% believed it was rather good. Only 18% were sceptical about the nutritional quality of the product.

Figure 5: Perception of the nutritional quality of a presented product



This inability to judge the nutritional quality of the product is further strengthened by a question on the nutritional disadvantages of the same product (figure 6). Only one-third of interviewees highlighted the high sugar content as the disadvantage, whilst as many as 45% of interviewees could not identify the clear nutritional disadvantage of the product shown.

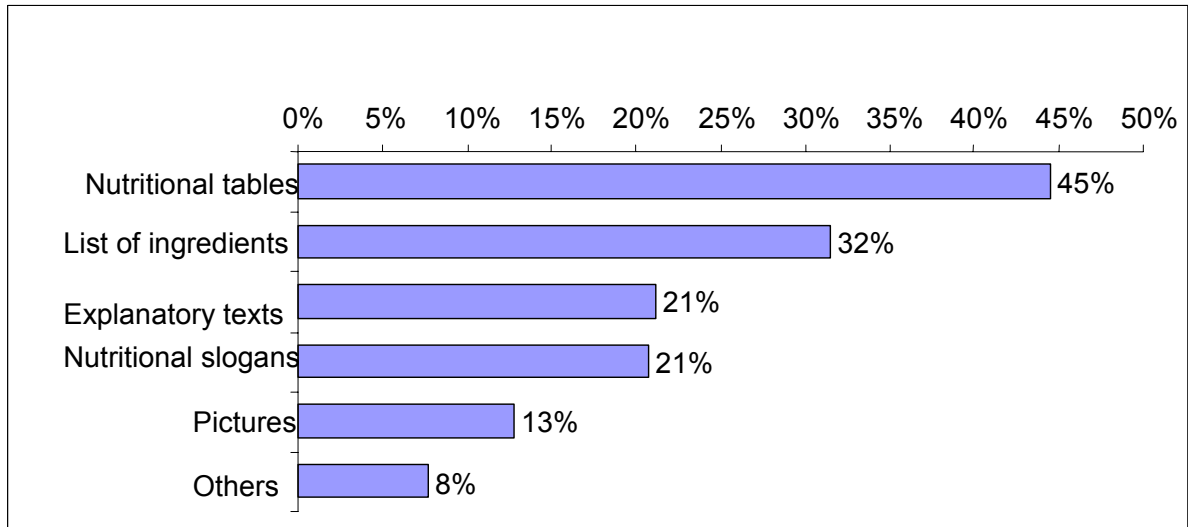
Figure 6: Nutritional disadvantage of the presented product



Nutritional information from the food package

When presented with an example of a food label interviewees identified a number of sources of nutritional information. The nutritional information most recognised was the nutritional table (45%) (figure 7), which was followed by the list of ingredients and explanatory text / nutritional slogans.

Figure 7: Sources of nutritional information on a presented food package



Nutritional claims

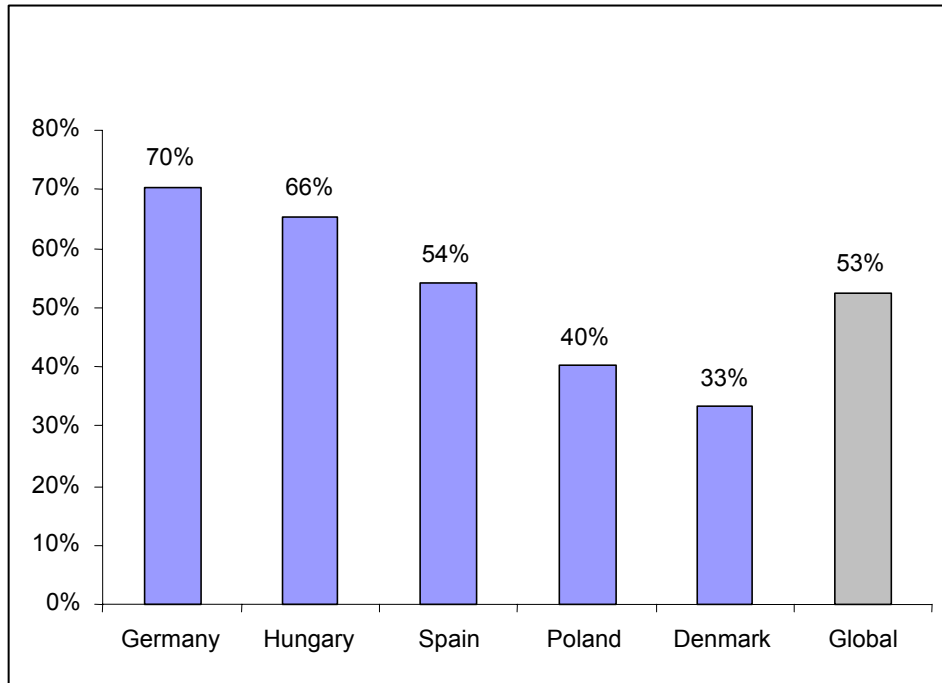
One of the most controversial ways of providing nutritional information is through the use of nutritional claims or 'marketing information'. These are the claims, which are made on foods promoting it to be nutritionally beneficial – low in fat or sugar, or high vitamins or minerals etc.

59% of interviewees declared that claims always or often caught their attention and that they read them. Only 14% said that they did not read claims compared to over a quarter of respondents who never read the nutritional table. Over half of interviewees agreed that a claim would lead them to buy a product.

The effectiveness of nutritional claims in attracting consumers' attention and influencing their behaviour is very clear. 80% of interviewees indicated that claims were easy to locate, and 70% believed they were easy to understand. In addition, over 50% of interviewees said they trusted claims (figure 8).

This figure was considerably lower in Denmark (33%) where claims (and the fortification of products) have been strictly regulated for many years. However, in Germany seven out of ten interviewees declared that they trust claims.

Figure 8: Do you trust nutritional claims?



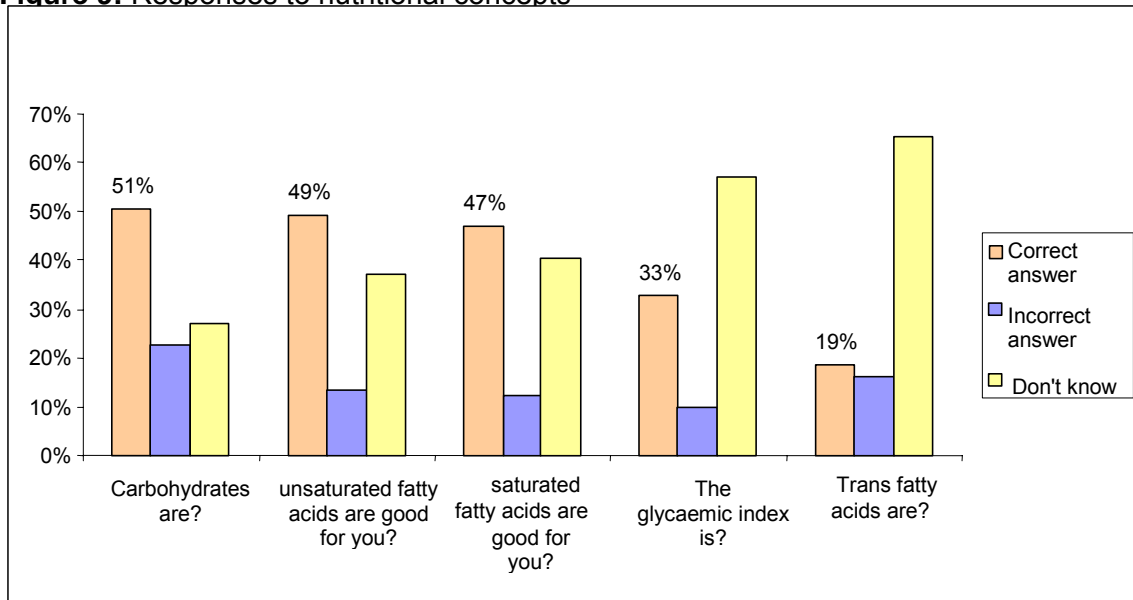
Consumer trust in nutrition claims is generally associated with consumer trust in the brand (65%), and in the retailer (18%). This, therefore, puts a great onus on the brand owner and retailer to ensure that claims on products are true and don't mislead the consumer.

Those who say that they don't trust claims also admit to be influenced by them. Their reason for not trusting the claim is that they cannot judge if the claim is true, or that they believe the claim could be misleading (both 38%).

This survey highlighted that consumers are not well informed about nutrition. Less than half of interviewees knew that a food rich in unsaturated fatty acids is good for them, and only half knew what a carbohydrate is. Up to 60% of the interviewees replied 'don't know' to many of the questions asked to test their knowledge on nutrition (figure 9).

This very limited level of information has an impact on the understanding of claims and of the nutritional information available on the labels. It is important to note that many interviewees believed they understood the meaning of a claim and admitted to be influenced by it, even if they had provided incorrect answers to the questions on their nutritional knowledge. The fact that claims were easily identified, easy to read and used terms which have now become familiar through their extensive use in advertising, gave interviewees the wrong impression that they understood their meaning.

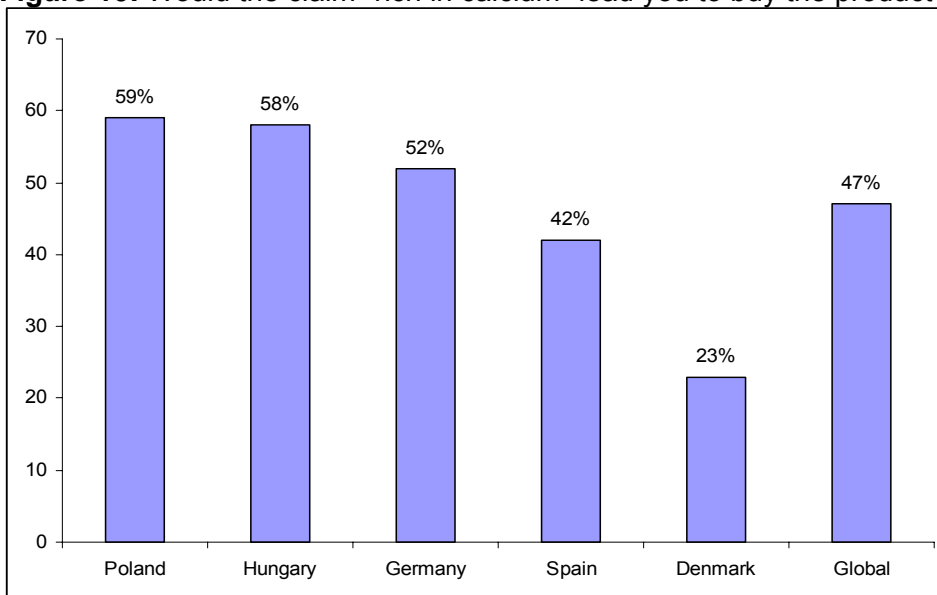
Figure 9: Responses to nutritional concepts



Given the inadequate overall knowledge of nutritional concepts and the high effectiveness of claims in catching consumers' attention, many consumers may not have the ability to judge accurately the actual, if any, benefit of a product, and rely on perceptions in making their food choices.

When presented with two similar products – one with and one without added calcium – three-quarter of interviewees believed that the product with added calcium was 'better' or 'rather better'. 47% of interviewees indicated that a claim such as 'rich in calcium' would lead them to buy a particular product (figure 10). Nearly a third of interviewees said that such a claim would lead them to consume more of the product.

Figure 10: Would the claim "rich in calcium" lead you to buy the product?

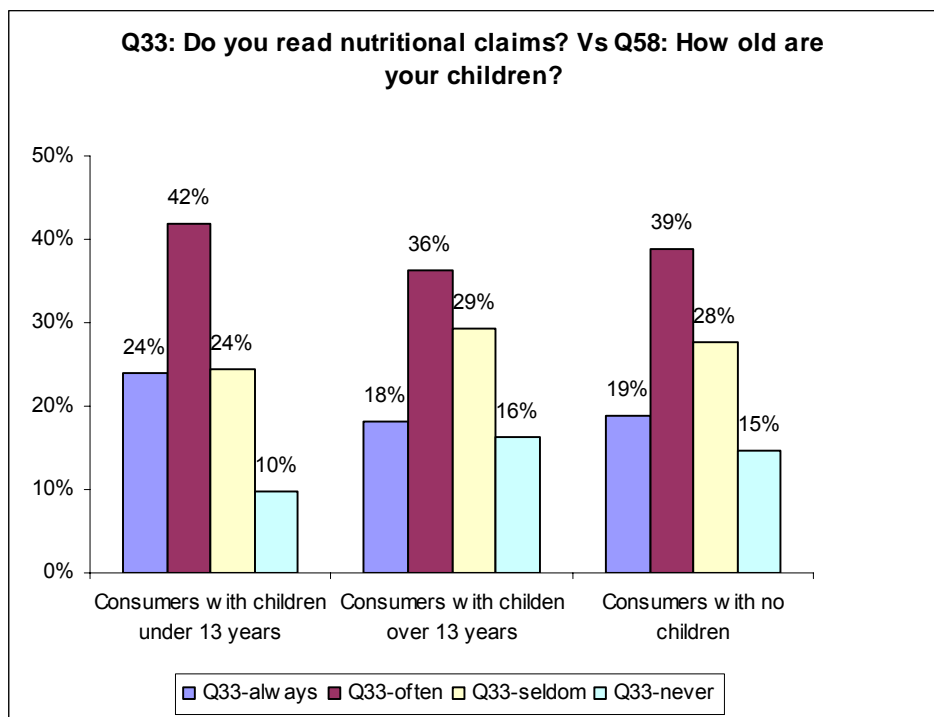


Interestingly, the survey again shows that in Denmark consumers are less likely to be influenced by a claim than in other countries. However, in countries where nutritional claims have not been regulated to the same extent as in Denmark, consumers are more likely to believe in the claim, consider products with claims ‘healthier’ and consume more of them.

Further analysis of the results

Further analysis of the responses provided as part of this survey have indicated that parents of young children (below 13 years of age) are more interested in nutrition than the parents of older children or adults without children. Claims catch parents’ attention more and parents are more likely not only to read claims (figure 11) but also to buy products with claims.

Figure 11: Relationship between respondents reading claims and having children



Parents of young children are also more likely to purchase non-dairy products rich in calcium, in those countries where such products are available.

Additionally, older people have more difficulties finding ingredient list and nutrition information on the label and tend to have less interest in nutrition compared to the other age groups. Women look more frequently than men at the list of ingredients and nutrition information.

Interpretation of the results and BEUC recommendations

The fight against obesity and the promotion of better diet and nutrition require action across a wide spectrum, involving many diverse factors and initiatives by many actors. As a consumer organisation, BEUC's special interest is in those factors that influence consumers in their buying behaviour in terms of "nutritional choices".

One of the fundamental consumer rights is that of consumer choice. Consumer choice is not simply a question of having a number of competing products on offer; it also includes having the necessary product information in a suitable form so that individual consumers can each make the choice that is most appropriate for them.

BEUC's survey on consumers' perceptions of food labels conveys a picture of many consumers with a high level of professed interest in nutrition and in the achievement of a balanced diet, combined with a relatively low level of understanding or knowledge of the issues involved.

When it comes to choosing products in terms of their nutritional qualities, the situation for consumers is even worse. Nutritional information, in the form of a nutritional analysis table, is not generally required on food labels. When it is present, it is not easy to locate, read and understand, mainly because of the use of small letter size and difficult terms.

There is a high reliance on commercial or marketing communications in the form of health and nutrition claims. Claims are placed in prominent positions on the pack, can be easily located but provide only a partial and often misleading description of the product. When presented with a product considerably high in sugar but marked with a claim the majority of consumers could not identify any nutritional disadvantage, and many even described the product as healthy. Whilst claims are usually valid, they tend to present only one part of the picture, typically concentrating on the presence or absence of one nutrient or group of nutrients. As such they are an entirely inadequate basis for a rational consumer choice (and indeed provide no basis for comparing one product with another).

Sadly, however, the survey results indicate that they are the single most influential factor in consumer choices, in terms of nutrition. The majority of consumers trust the claims on the package, mainly because they trust the brand, and believe they understand their meaning. However, many interviewees who admitted to trusting claims did not have a good knowledge of nutritional concepts and terminology. Over half of consumers admit that nutritional claims lead them to buy a product and one consumer out of three states that nutritional claims lead them to consume more of the product. Even consumers who do not trust claims have a better perception of a product with claims compared to a similar product without claims.

These results underline the importance of the current proposal on health and nutrition claims⁴, and particularly the provisions on nutritional profiles and prior approval for new types of claims. Since these claims are so influential and so powerful in their effects on buying behaviour (especially for trusted brands), they merit careful regulation to prevent abuse, misunderstanding or misinterpretation.

For many food products it may be relatively harmless to point to the presence or absence of one or a few nutrients. For others, however, positive claims for one or a few nutrients without reference, for example, to high levels of added sugar, salt or fat will inevitably (as shown in the survey responses) encourage inappropriate consumer choices – hence the need to place limits on the use of claims for certain nutritional profiles.

Given also the influential nature of health and nutritional claims, novel claims are likely to have substantial effects on consumer buying patterns and on the market generally. There is therefore all the more reason for caution and prior approval for any new type of claim that has not been previously known or accepted.

To exercise their right of choice between one product and another, consumers must have access to product information that is accurate and understandable, and that enables comparisons to be made between competing products. It is necessary therefore to develop a standard system of on-pack nutritional labelling.

It is difficult to devise a labelling scheme that is both sufficiently comprehensive and comprehensible. BEUC favours a two-tier approach, consisting of a nutritional analysis table, including information in the form of Recommended Daily Amounts (RDAs), combined with a simplified front of pack “sign-posting” system that conveys certain essential information in a manner that facilitates consumer choice at point of purchase.

In principle, the nutritional analysis table would be more or less like the one in current use, although more work needs to be done to try to improve the content, readability and relevance of the information in the current table. Even more work is needed to devise an effective signposting system to complement the nutritional table. There are a number of current research projects that should help to throw light on this question. BEUC experts have also been developing guidelines or principles for signposting systems and the results of our work to date are set out in document BEUC/X/031/2005.

⁴ COM (2003)424 final - Proposal for a REGULATION OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL on nutrition and health claims made on foods

For purposes of comparison and consumer choice the crucial information must be given on the pack and not (only) in other forms such as internet sites or special consumer help-lines. The survey shows clearly that consumers pay most attention to on-pack information, including claims, whilst information sources “off-pack” are rarely consulted. Even if consumers were persuaded to pay more attention to off-pack information, which in itself would be difficult, off-pack sources of information would be of little help to consumers in choosing between one product and another at the point of purchase. Indeed, off-pack information would be almost powerless to counteract the strong influence of on-pack health and nutrition claims.

The study also shows that TV and print media, including of course commercials, are with labels the main sources of nutrition information for consumers. Therefore, these media, must be conscious of their role to accurately inform consumers. In addition, BEUC would favour the restriction of advertising of foods high in fat, sugar and salt to children, given that children develop their food eating habits early in life.

Finally, the survey results indicate a relatively low level of nutritional understanding among consumers, at least when comparing similar products. BEUC favours better consumer education but as far as practicable but in the present case there is little point in trying to educate consumers to a better understanding of nutritional information if they do not have the information they need to understand in the first place. It is important to improve this knowledge through better consumer education, including children and students, but it also very important to recognise that better consumer education is not the answer to this issue of consumer choice. A comprehensive system of nutritional labelling would contribute to address the asymmetry of information between producer and consumer.