

Awareness, Usage and Attitude study for the CSIRO Total Wellbeing Diet

Prepared for CSIRO Human Nutrition

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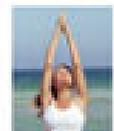
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Background and Methodology



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- ◆ CSIRO would like to gain an understanding of the awareness, usage and attitudes of Australian consumers in relation to The Total Wellbeing Diet (TWD) and how this affects their understanding and feelings towards the CSIRO brand
- ◆ Objectives of the study:
 - ✦ To see how TWD has contributed to CSIRO's aim to aid in a positive change to Australian eating culture and consumer nutrition. Specifically to answer questions such as:
 - ◆ Are people aware of the TWD? How did they find out about it?
 - ◆ Do they use the book? In what ways?
 - ◆ Has the book changed their behaviour in any way and how?
 - ✦ Reinforcing the positioning of CSIRO as Australia's most trusted and respected science and technology organisation
 - ◆ How do consumers feel about CSIRO? Do they trust and respect the organisation?
 - ◆ How does this compare to other similar organisations?

- ◆ For this study we used a *multi-modal approach incorporating elements of best practice organisational reputation research* for CSIRO, made up of an initial representative population survey by telephone followed by an online component
- ◆ The representative Population Survey was 10 minutes long and provided a true measure of the impact of TWD in each segment
- ◆ The online survey allowed us to boost the overall sample and drill down in more detail. Sample breakdown is as follows:

	 Telephone 10 minutes	 Online 15 minutes	TOTAL
Metro	702	2824	3526
Regional	298	1202	1500
TOTAL	1000	4026	5026

Telephone data was weighted to population in line with ABS statistics. The online sample was then weighted to match the telephone sample. Details of the unweighted and weighted samples are in the appendix

Data from the online sample is similar to that of the telephone survey. Online respondents were a little more likely to acknowledge they were trying to lose weight and on a diet but also more likely to eat what they wanted – perhaps owning up to socially unacceptable behaviours?

Summary of findings

- ◆ Overall, Australians have a healthy attitude towards weight loss with a focus on diet and weight loss programs rather than surgery or weight reduction drugs
- ◆ There has been strong interest in TWD as reflected by high awareness figures (65%) and the overall number of people who have looked through the book (22%)
- ◆ One fifth of Australians have heard about TWD via word of mouth further supporting this interest and indicating the integrity and belief in the CSIRO brand
- ◆ Mainstream media have got behind TWD resulting in these high awareness figures for minimum media spend
 - ◆ The retail sector, particularly book sellers, has also had a role to play
- ◆ The key effect TWD has had on those who have used it is to increase overall consciousness about diet and nutrition – this is on target with the ultimate goal to improve Australians' overall nutrition and create a positive eating culture

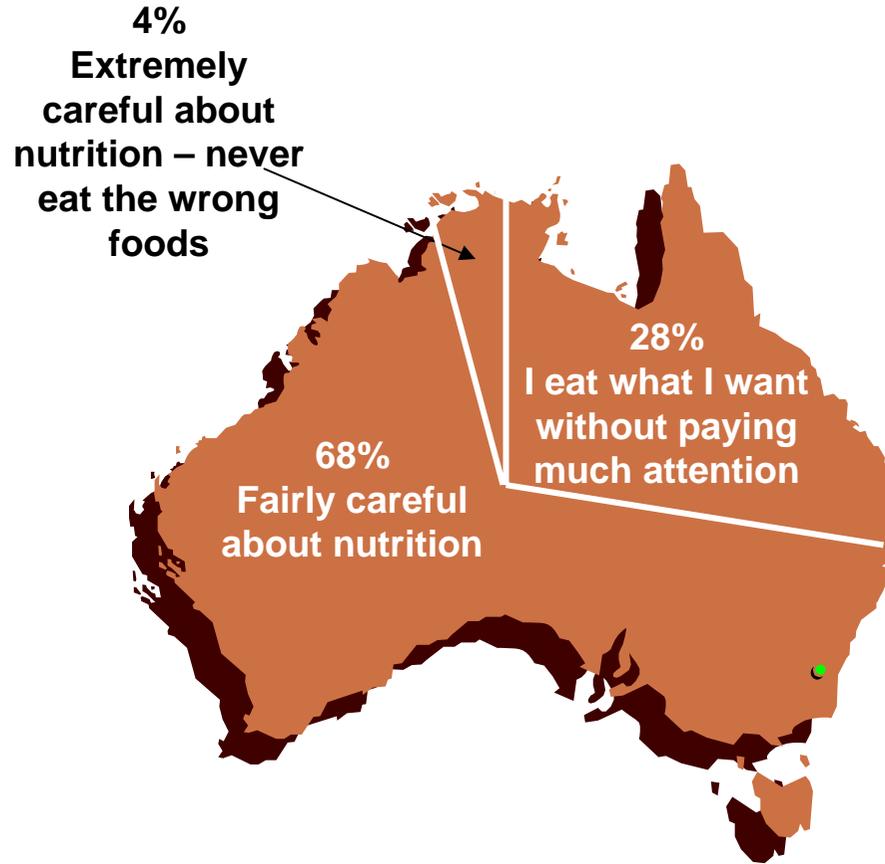
- ◆ To date the key hook encouraging usage of TWD remains weight loss – however, once in the home, TWD is used as a general resource for healthy eating as well as for recipe ideas for the entire household
- ◆ Those most receptive to TWD are women and people currently trying to lose weight
 - ✦ Also receptive are older groups, and those who feel they generally should be trying to lose weight but might not currently be taking action
 - ✦ Overall there are few demographic differences in the way people perceive and use TWD reflecting the fact that TWD has reached and influenced all types of Australians
- ◆ The CSIRO brand is held in high esteem by the general population reflecting high levels of respect and trust in CSIRO as well as credibility
 - ✦ Older groups feel more strongly about this as do those who have used TWD
 - ◆ Overall figures are high across all demographics

Australians, diet and nutrition



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Australians' overall attitudes towards nutrition



Overall, the majority of Australians feel they are *fairly careful about nutrition*. Approximately 28% are currently trying to lose weight with a further 12% wanting to but not currently trying

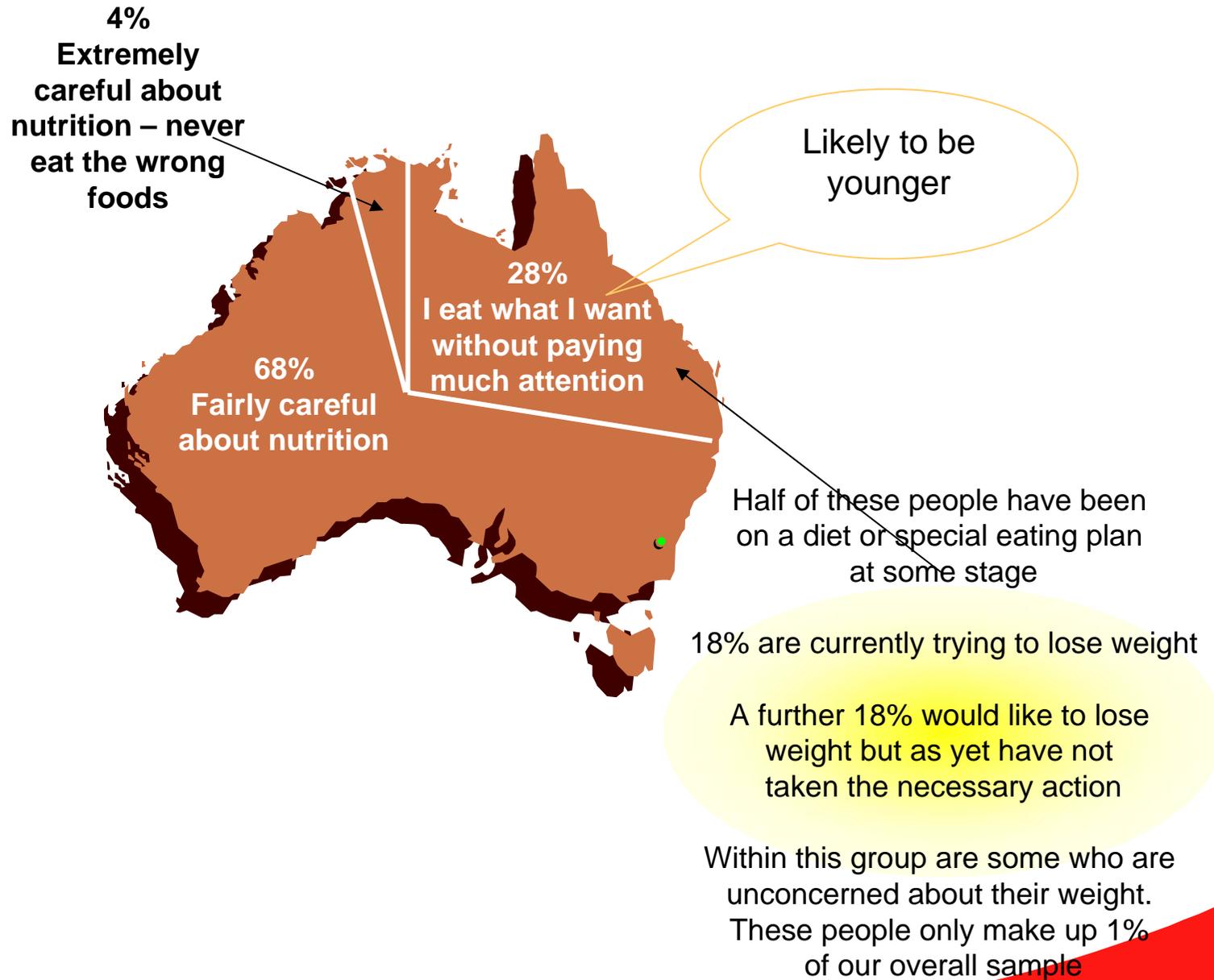
n = 5026

Q4. Which best describes your overall attitude to eating and food in general?



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Australians' overall attitudes towards nutrition



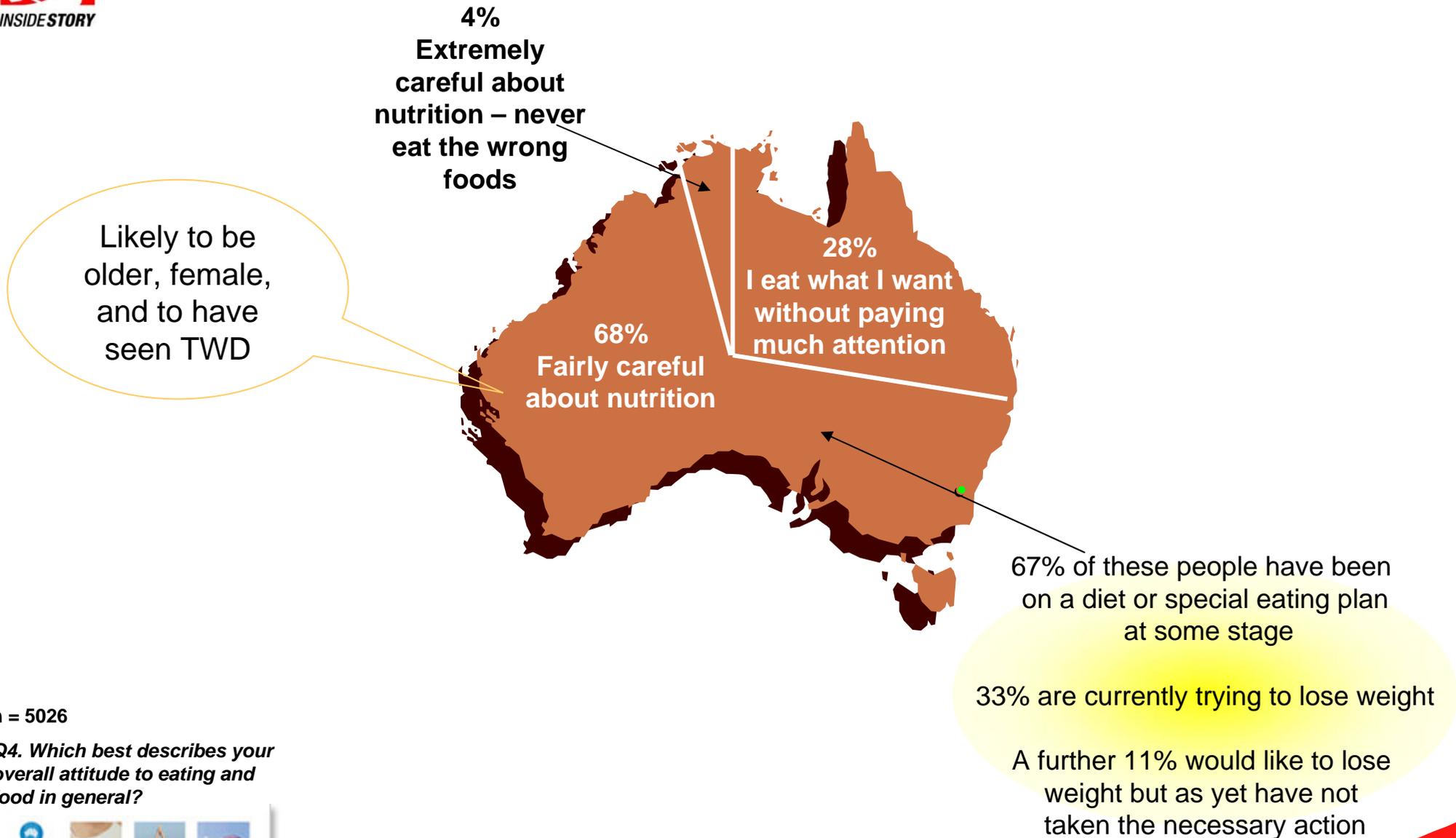
n = 5026

Q4. Which best describes your overall attitude to eating and food in general?



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Australians' overall attitudes towards nutrition



n = 5026

Q4. Which best describes your overall attitude to eating and food in general?



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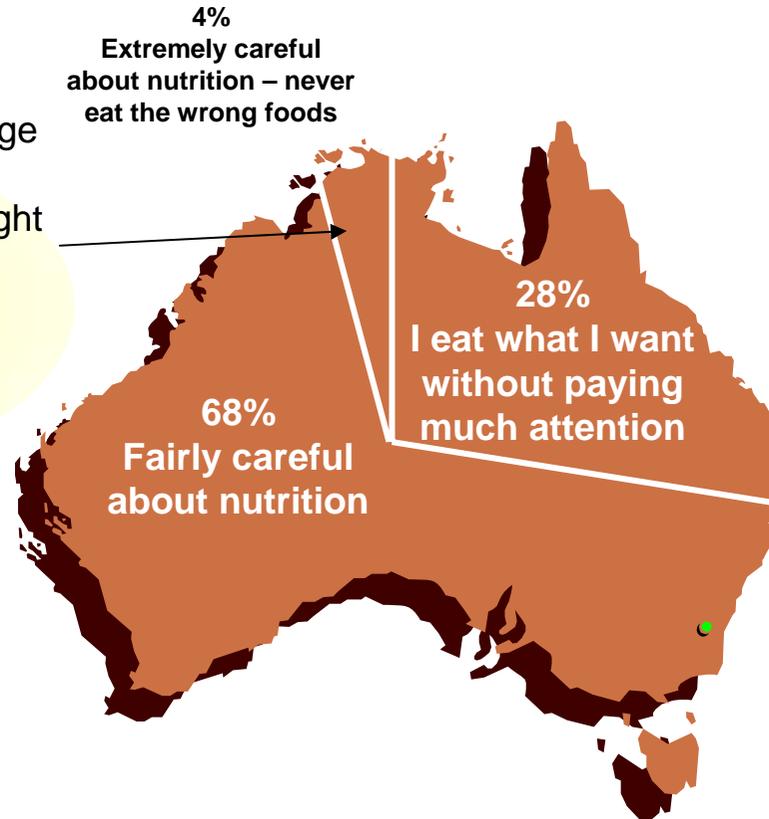
Australians' overall attitudes towards nutrition

65% of these people have been on a diet or eating plan at some stage

27% are currently trying to lose weight

A further 2% would like to lose weight but as yet have not taken the necessary action

This group are most likely to be interested in TWD



n = 5026

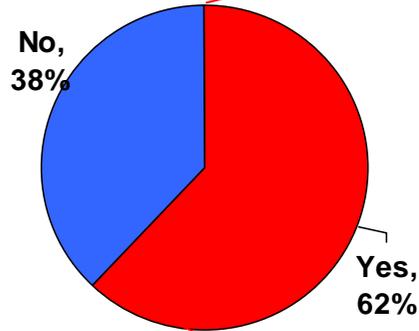
Q4. Which best describes your overall attitude to eating and food in general?



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Australian's attitudes towards nutrition



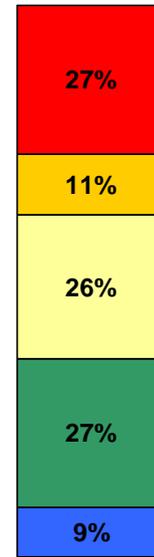
n = 5026 - Total

Q5. Have you ever gone on a diet or special eating plan either for health reasons or to try to lose or gain weight?

- 7+ times
- 5-6 times
- 3-4 times
- 1-2 times
- Never

n = 3189 - Have dieted

C6 How many times have you intentionally tried to lose weight?



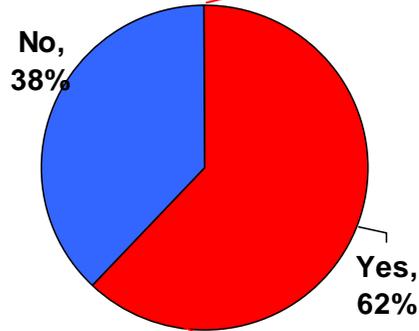
91% were looking to lose weight

Likely to be female and currently trying to lose weight

Two thirds of Australians have at some stage gone on a special eating plan or diet. For most of these, the aim was to lose weight.



Australian's attitudes towards nutrition



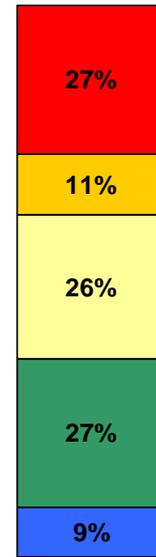
n = 5026 - Total

Q5. Have you ever gone on a diet or special eating plan either for health reasons or to try to lose or gain weight?

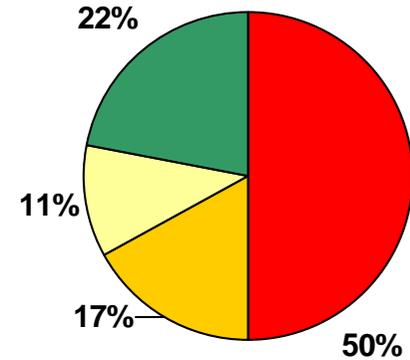
- 7+ times
- 5-6 times
- 3-4 times
- 1-2 times
- Never

n = 3189 Have dieted

C6 How many times have you tried to lose weight?



91% were looking to lose weight



- Currently trying to lose weight
- Currently trying to maintain weight
- Not concerned about my current weight
- Like to lose, but have not taken the necessary actions yet

n = 2911 – tried to lose weight

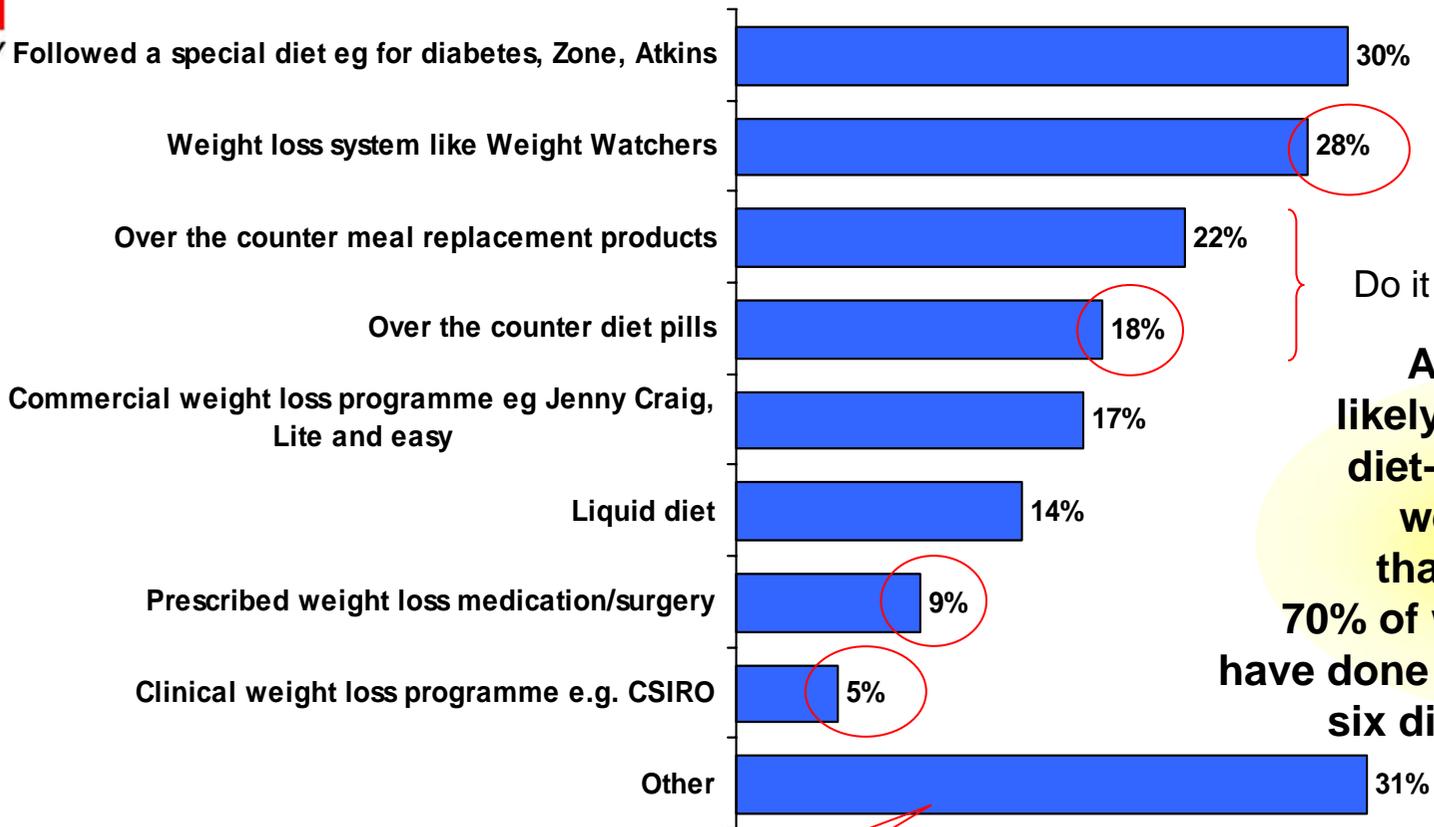
C7 which of the following applies in relation to weight loss

Of this 91%, half are currently trying to lose weight with a further 22% wanting to lose weight but not taking the necessary steps.



INSIDESTORY Followed a special diet eg for diabetes, Zone, Atkins

Specific diets used?



Do it yourself

Australians more likely to take a practical, diet-based approach to weight loss rather than surgery or pills. 70% of weight loss attempters have done so using one of these six diet based approaches

My own plan – cut out junk food/sugar/wheat

Dietician, nutritionist

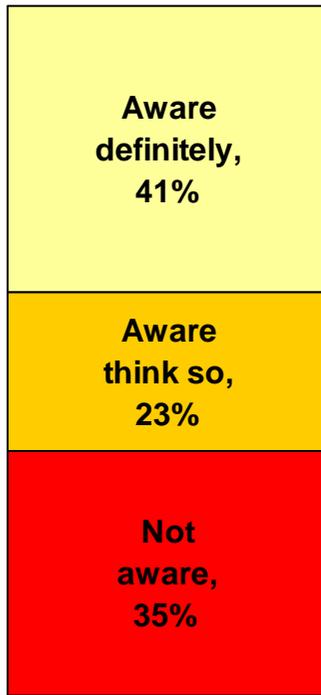
More exercise

n = 2911 - Tried to lose weight
 C8 Have you ever attempted to lose weight using any of the following methods?



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Awareness of CSIRO's Total Wellbeing Diet



Total aware: 65%

Awareness is high – messages about TWD have reached two thirds of the population! ...including those not concerned with their weight

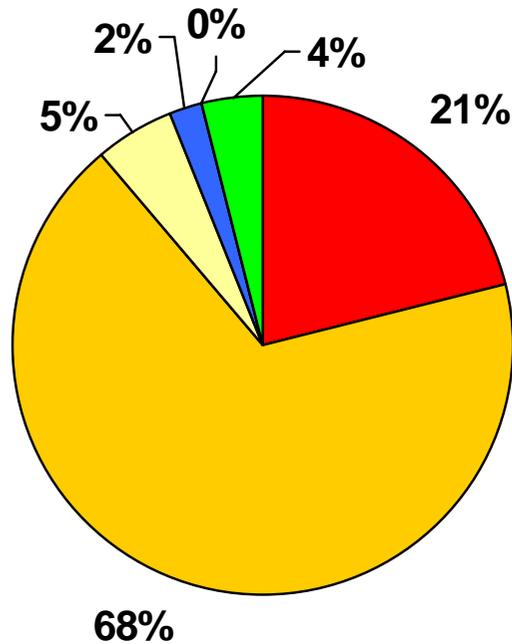
Overall those aware are likely to be female, 60+ or interested in losing weight. However, even those that are not concerned with losing weight have high awareness. All demographics have awareness over 50%

N=5026

	Total	Gender		Age				Current attitude towards weight loss			
		Male	Female	18-24	25-39	40-59	60+	Lose	Maintain	Don't care	Want to
Aware	65%	57%	72%	53%	65%	67%	71%	76%	75%	68%	71%

Males and females are almost equally likely to be trying to lose weight

Spreading the word – first heard



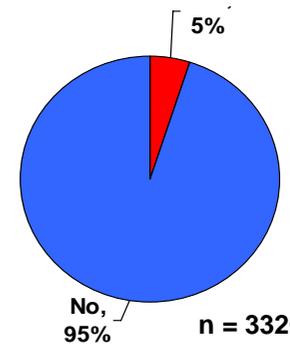
- Heard about it from a friend/family/colleague
- Traditional media
- Bookstore
- Online
- CSIRO website or people working at CSIRO
- None of these

n = 3326 aware

Q23. Where did you first hear about TWD?

Good level of reach generated by mainstream media reinforcing the power of television, radio and print. Word of mouth is also important. Could viral marketing be an option?

While merchandising in bookstores has also helped increase awareness, the website is an ancillary marketing device that people use for information once they have a reason to go there.

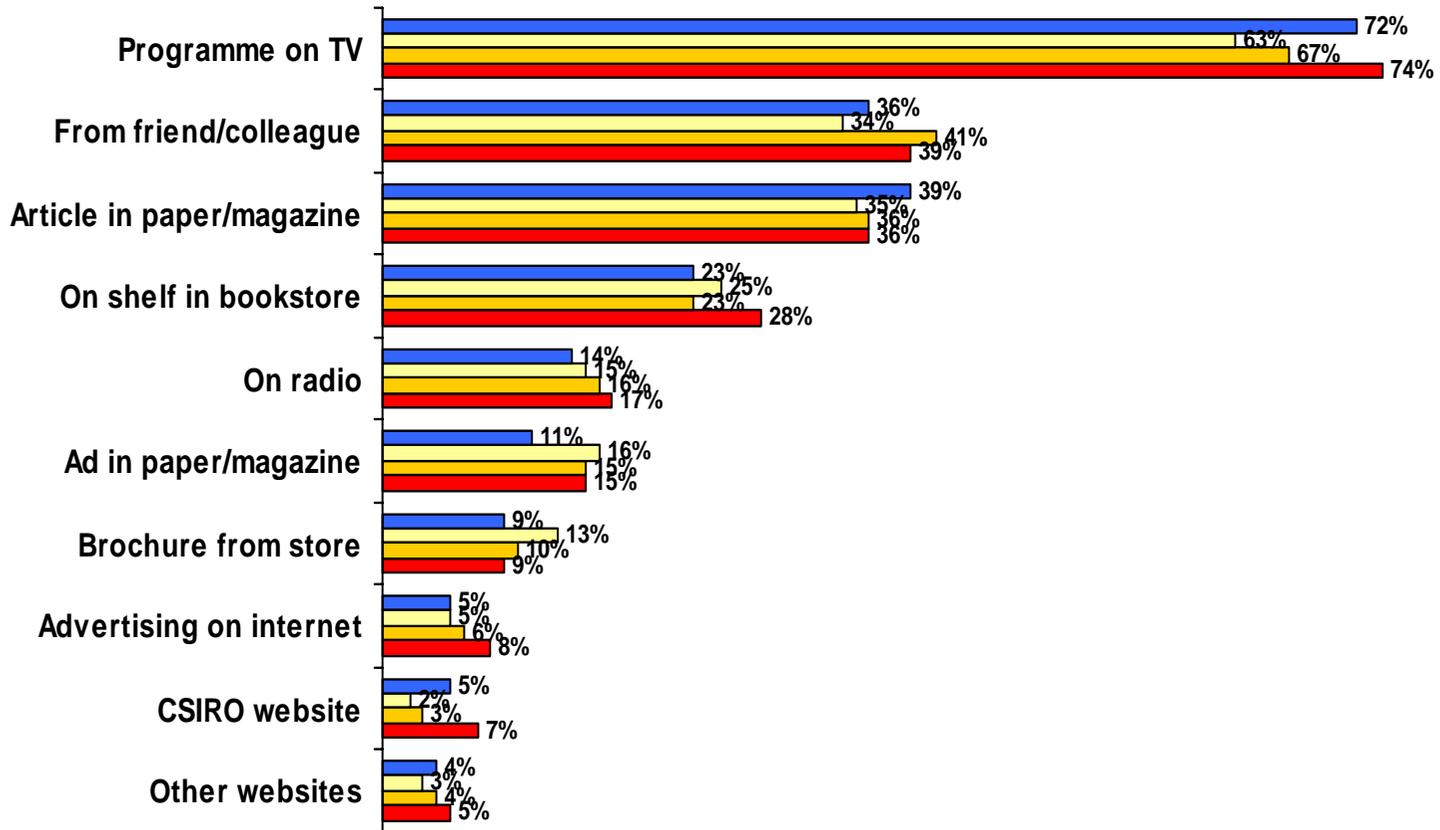


n = 3326

Q 30. Used the website to download information?

These figures reflect the high level of interest in TWD by the general public as well as the support of the mainstream media

Great results from passive media and especially for bookstores

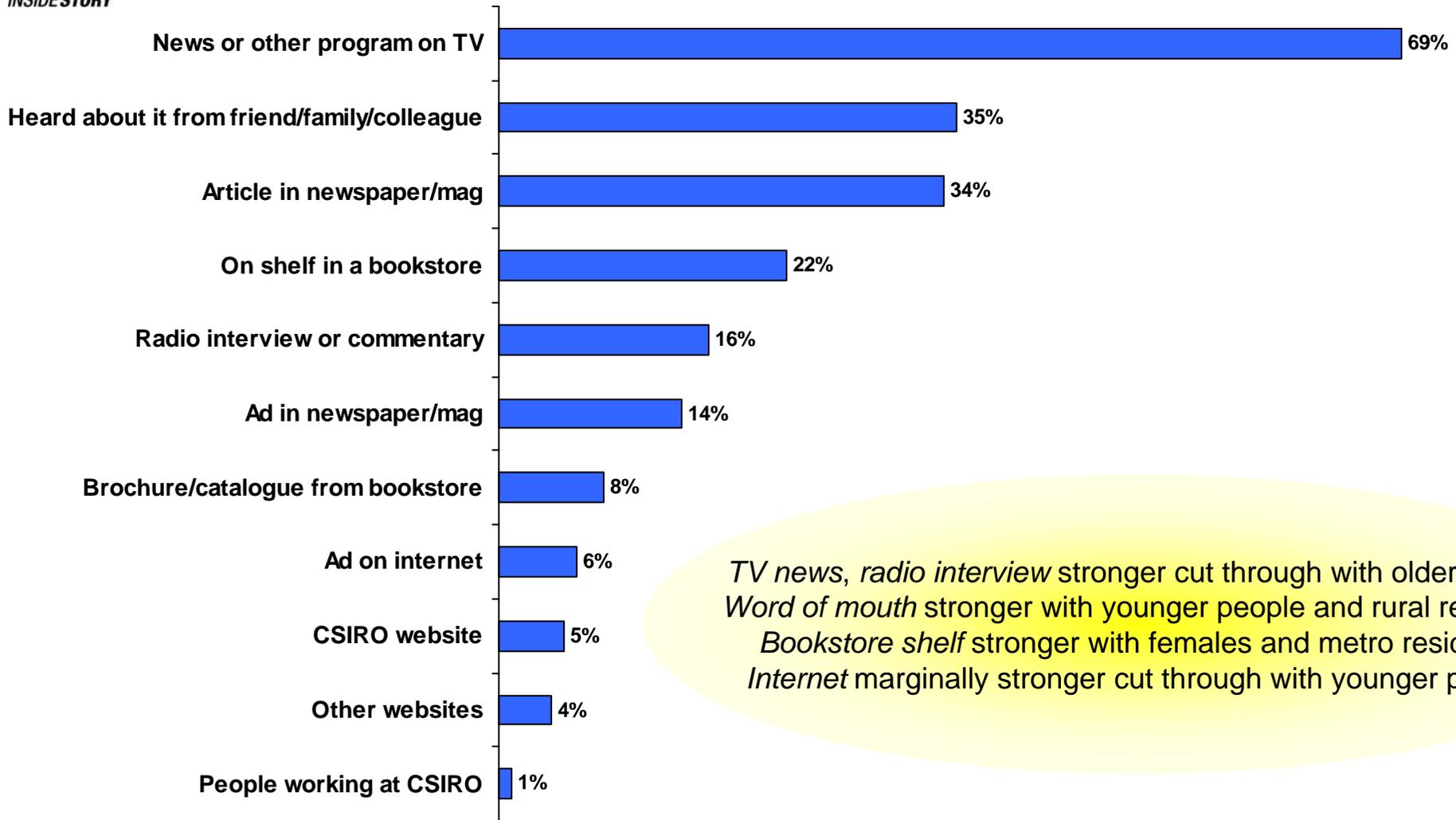


n = 3326 aware

Q22. Thinking back, where have you heard about TWD?

■ Lose weight
 ■ Maintain weight
 ■ Not trying to change
 ■ Like to lose but no action

Differences here are few between those not interested in weight change vs. others. Messages are reaching everyone.



TV news, radio interview stronger cut through with older people
Word of mouth stronger with younger people and rural residents
Bookstore shelf stronger with females and metro residents
Internet marginally stronger cut through with younger people

n = 3326 aware

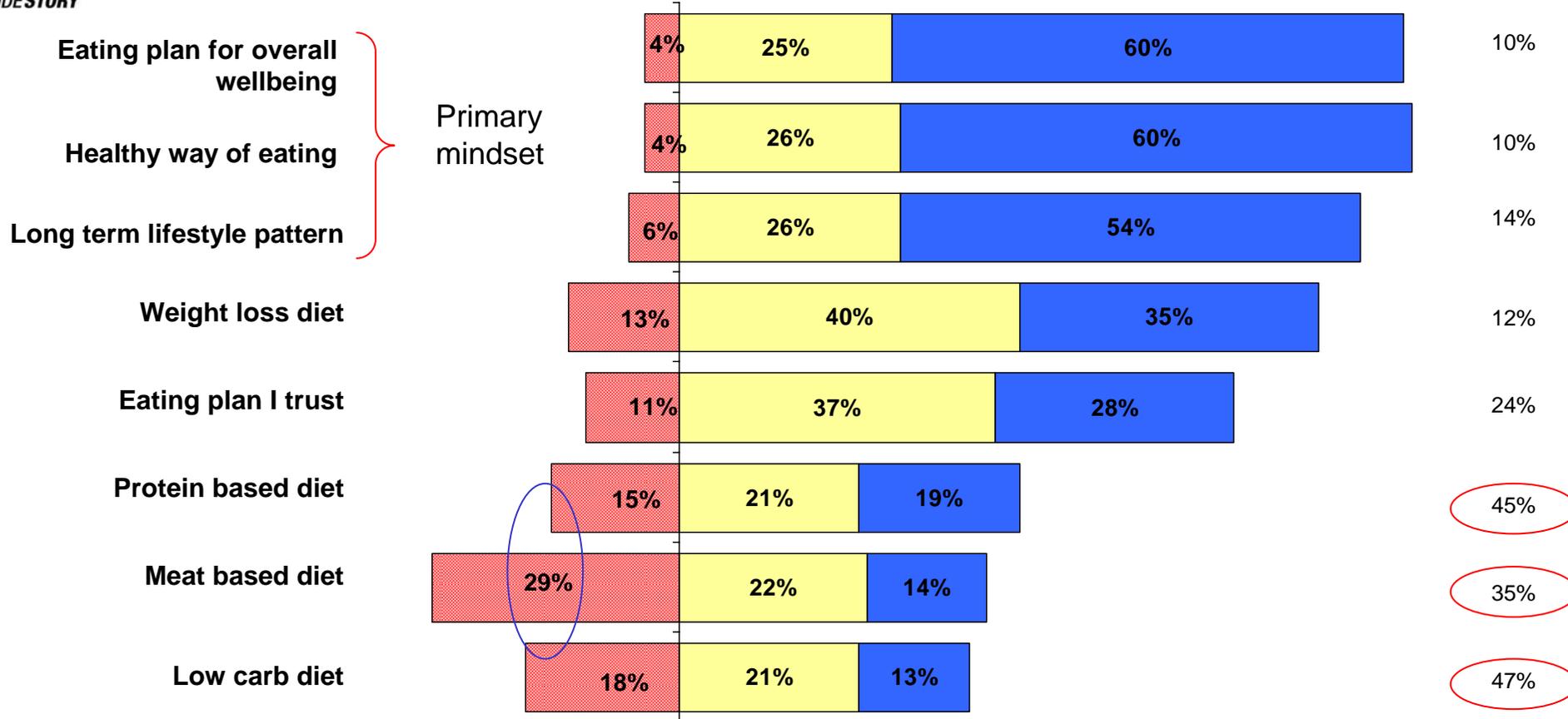
Q22. Thinking back, where have you heard about TWD?



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What is the general feeling about TWD?

Not really, definitely not Sort of Definitely Don't know



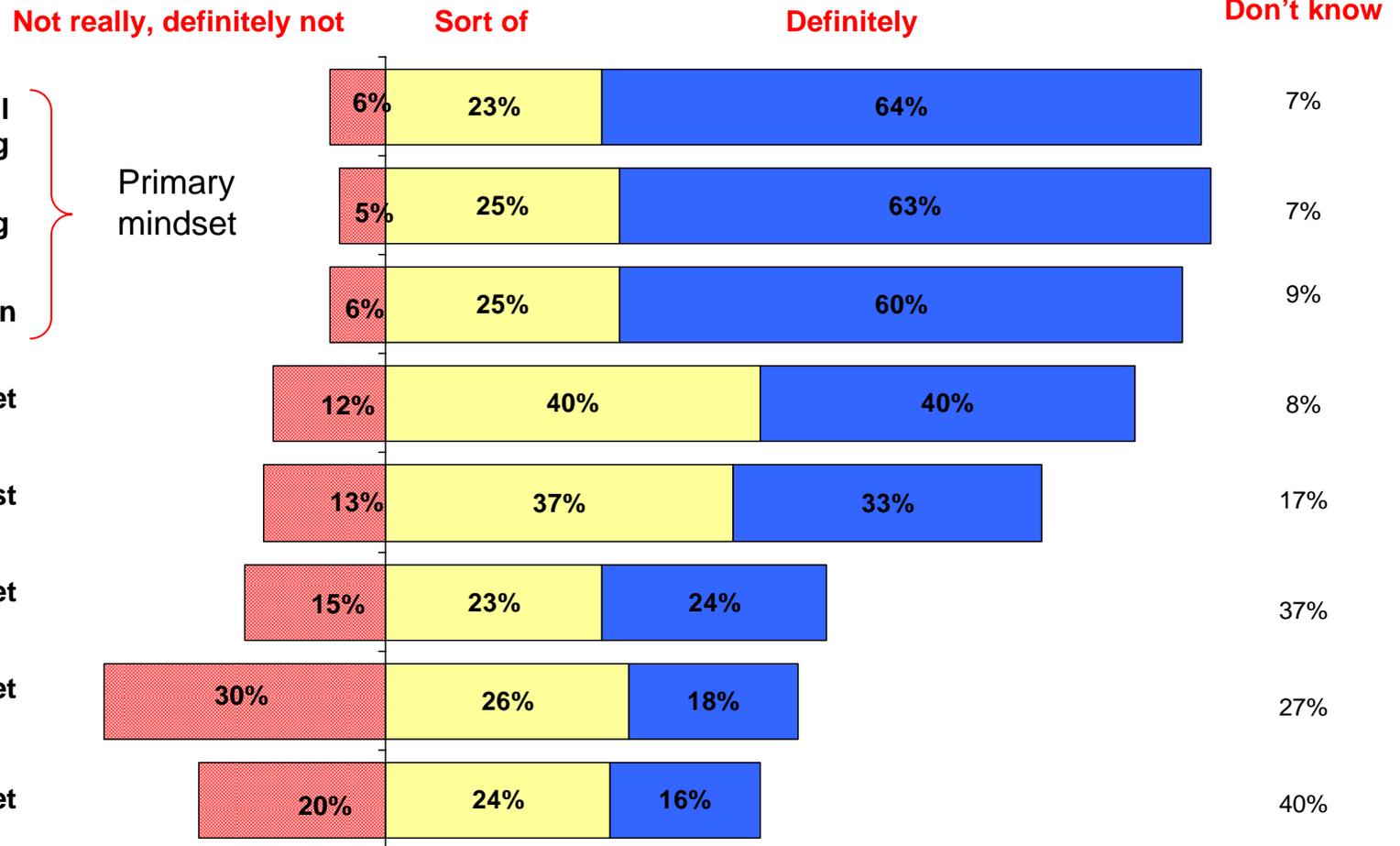
n = 3326 – all aware

Q9. Can you please tell me your impressions of CSIRO TWD?

Perceptions of the diet are overwhelmingly focused on being a healthy eating plan for overall wellbeing. This positive message is on strategy for the long term health of Australians.

The weight loss component a secondary message

What is the feeling among those 'definitely' aware?



n = 2070 - definitely aware
 Q9. Can you please tell me your impressions of CSIRO TWD?

Those Australians who are 'definitely' aware of TWD, are more likely to have an opinion about TWD – but the differences are not large

CSIRO TWD delivers well on important attributes

Q6 Very Important factors in an eating plan

Q10 CSIRO delivers Sort of

Definitely

Based on good nutrition

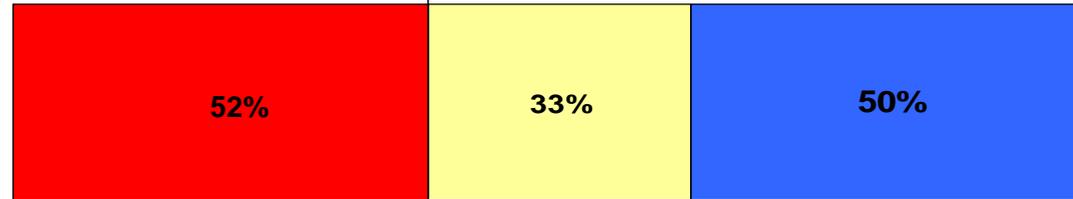


68%

28%

57%

Improve my health overall not just lose weight

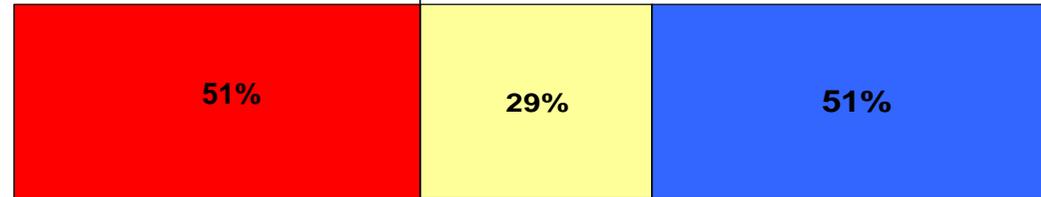


52%

33%

50%

Habit for life



51%

29%

51%

n = 4026

Q6. How important are each of the following to you personally in an eating plan?

n = 1854

Q10. And based on what you know, how would you say the CSIRO TWD delivers on the following?

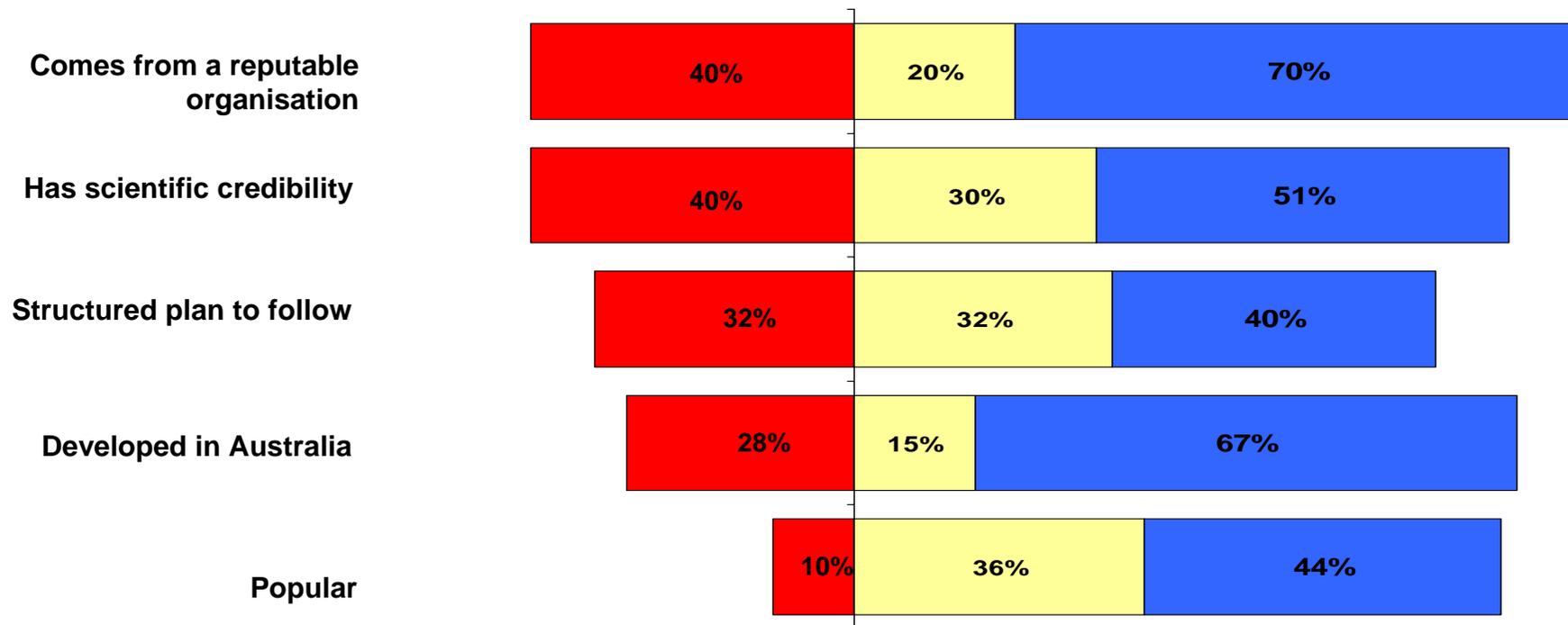
Overall good nutrition and improvements for overall health are strong messages for promotion moving forward as these issues are key to consumers

CSIRO TWD delivers well on important attributes

Q6 Very Important factors in an eating plan

Q10 CSIRO delivers
Sort of

Definitely



n = 4026

Q6. How important are each of the following to you personally in an eating plan?

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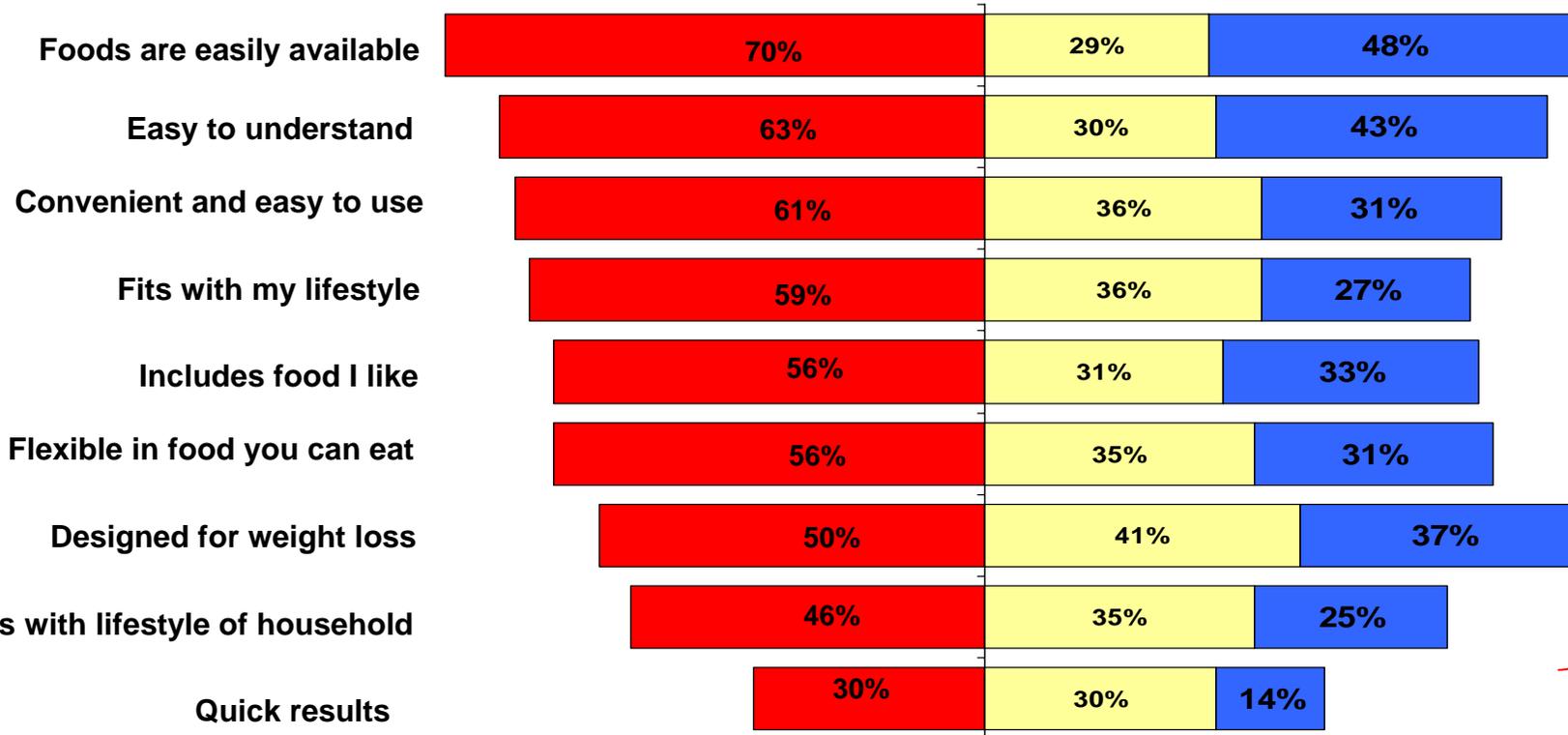
TWD strengths lie in the credibility of the CSIRO brand and its local basis – all issues that make for interesting media stories encouraging the support of media and population

Opportunities to further develop convenience message

Q6 Very Important factors in an eating plan

Q10 CSIRO delivers
Sort of

Definitely



Key messages relating to ease of use, and flexibility could be further developed

n = 1854

Q10. And based on what you know, how would you say the CSIRO TWD delivers on the following?

n = 4026

Q6. How important are each of the following to you personally in an eating plan?

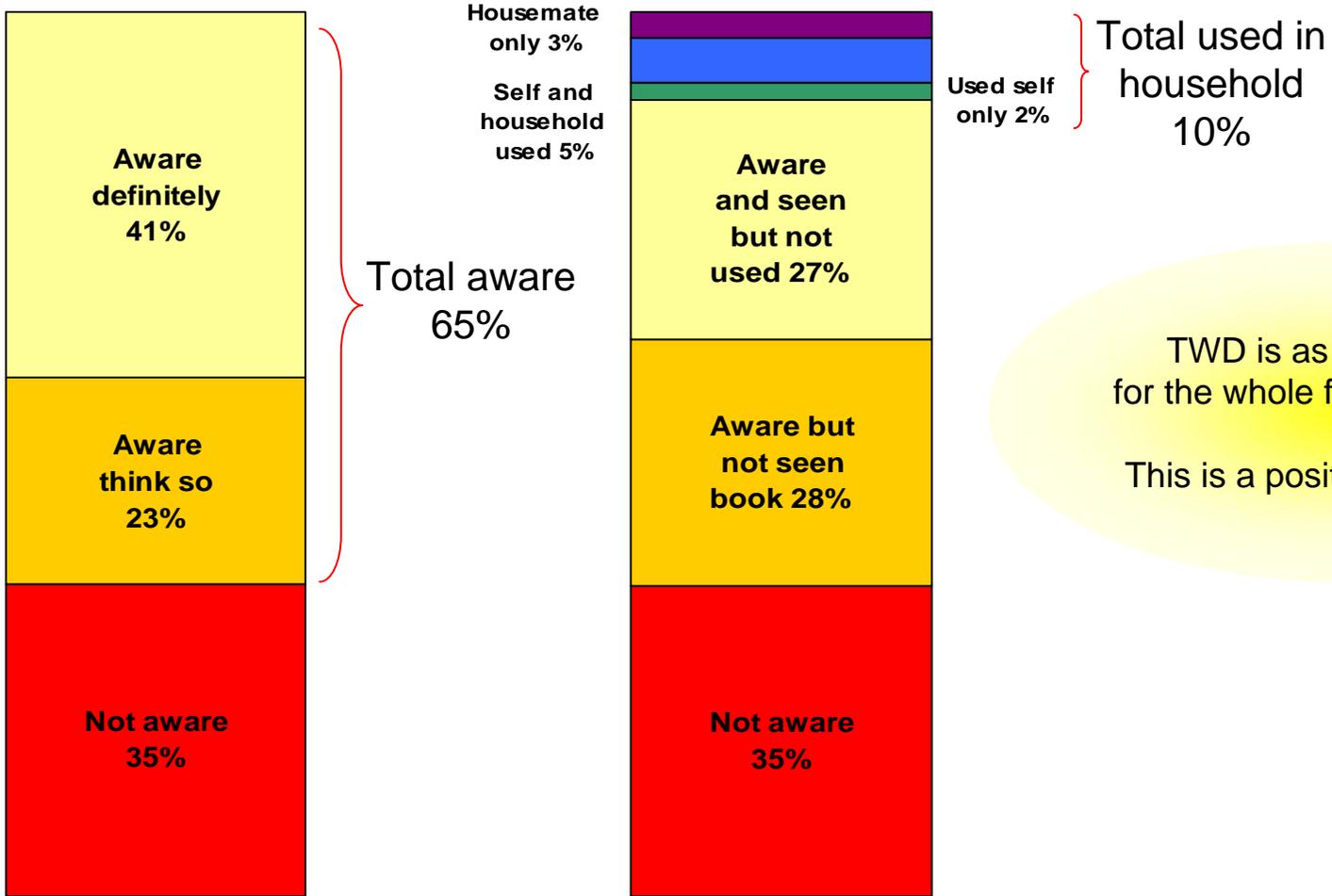
Who has used the Total Wellbeing Diet?



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Overall picture of usage and awareness



TWD is as a way of life for the whole family/household
This is a positive media story

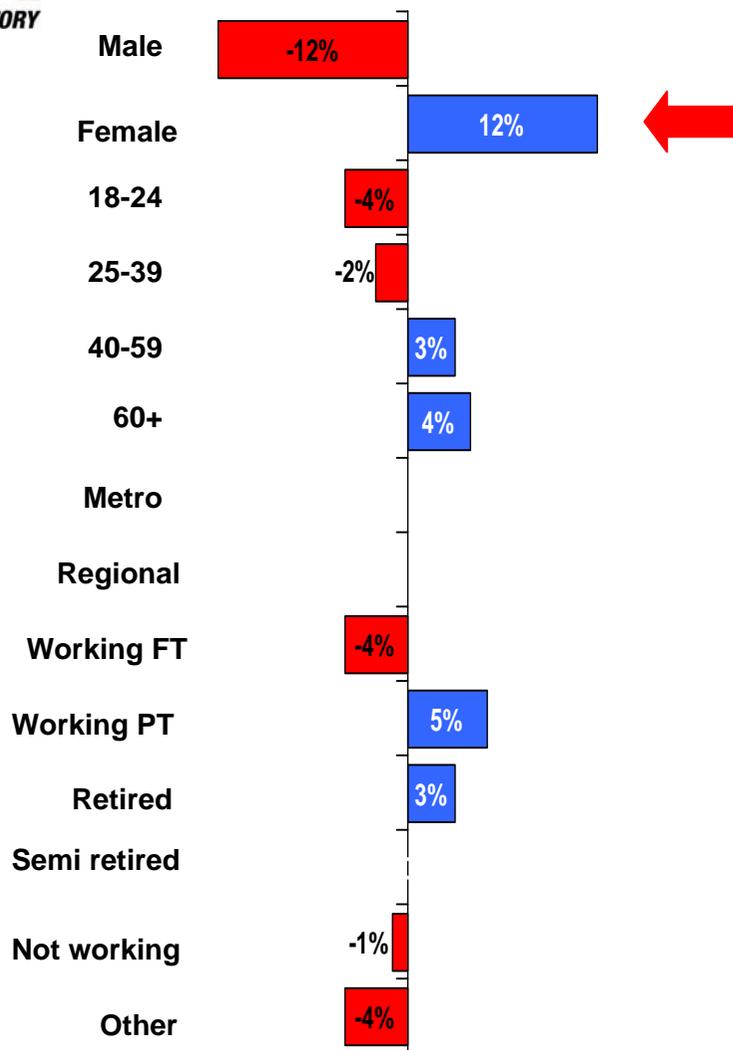
n=5026 total
Q7. Have you heard of the CSIRO TWD?

n=5026



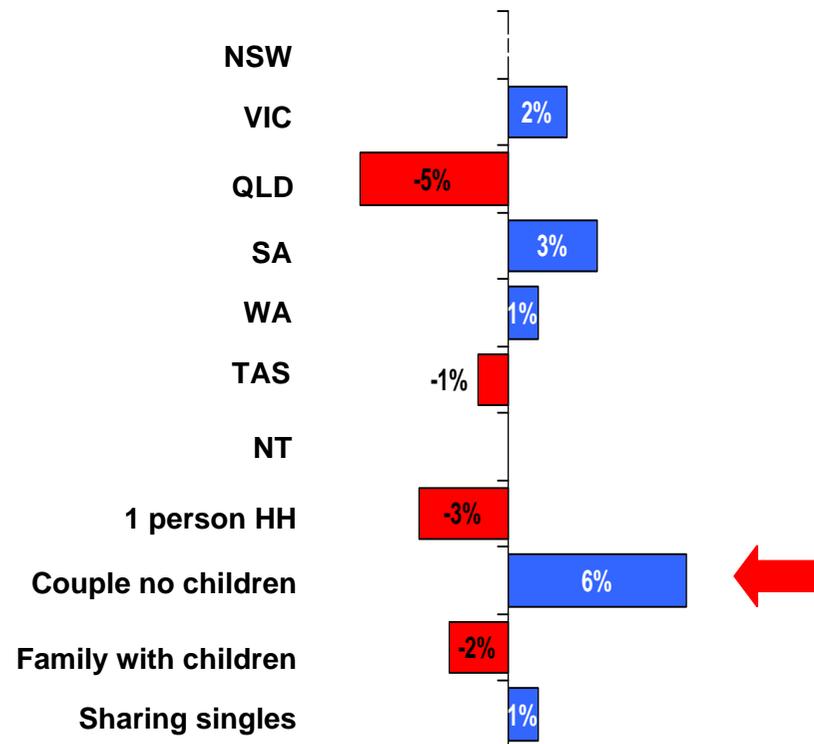
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Difference from total



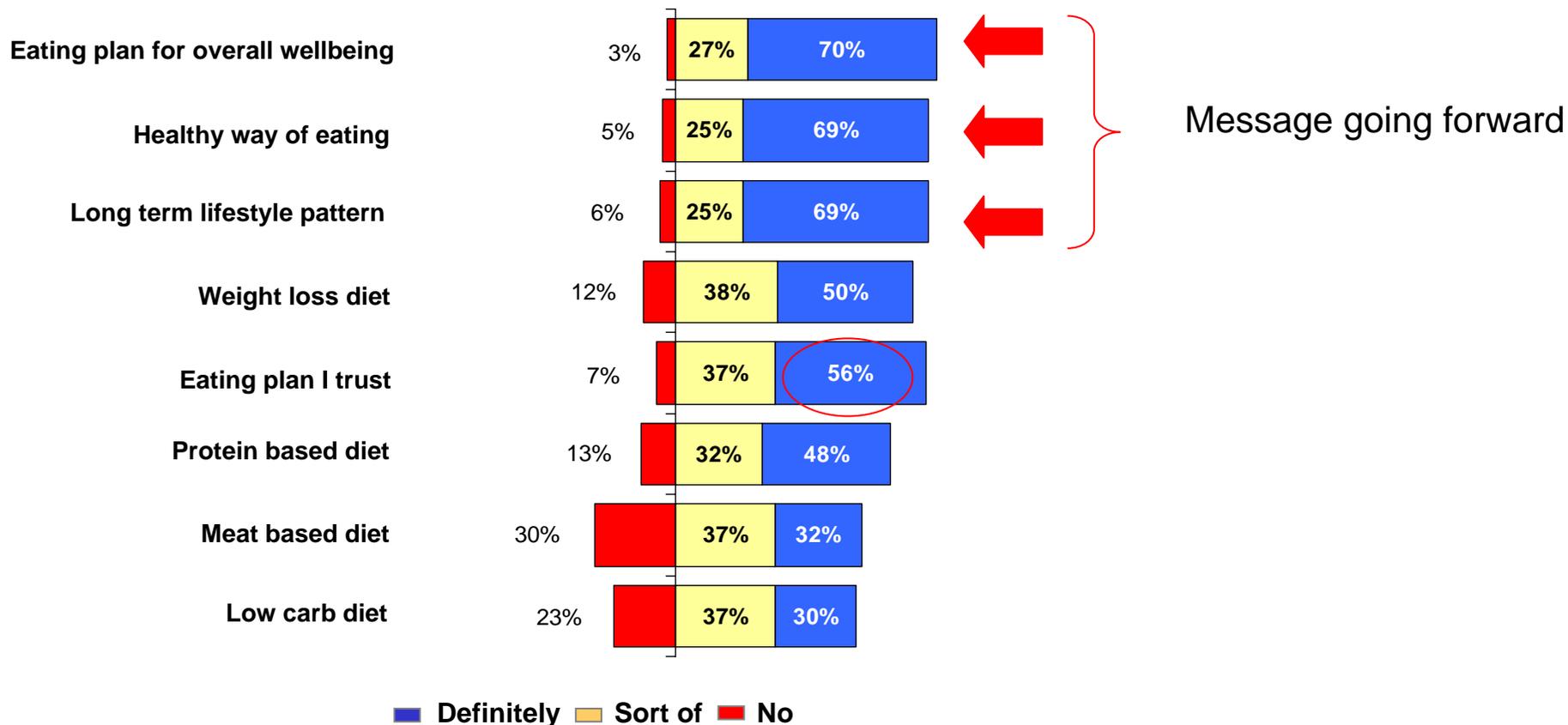
n=378 personal users

Difference from total



Females and couples with no children are more likely to have used TWD. Few demographic differences apart from these

Those that have used TWD

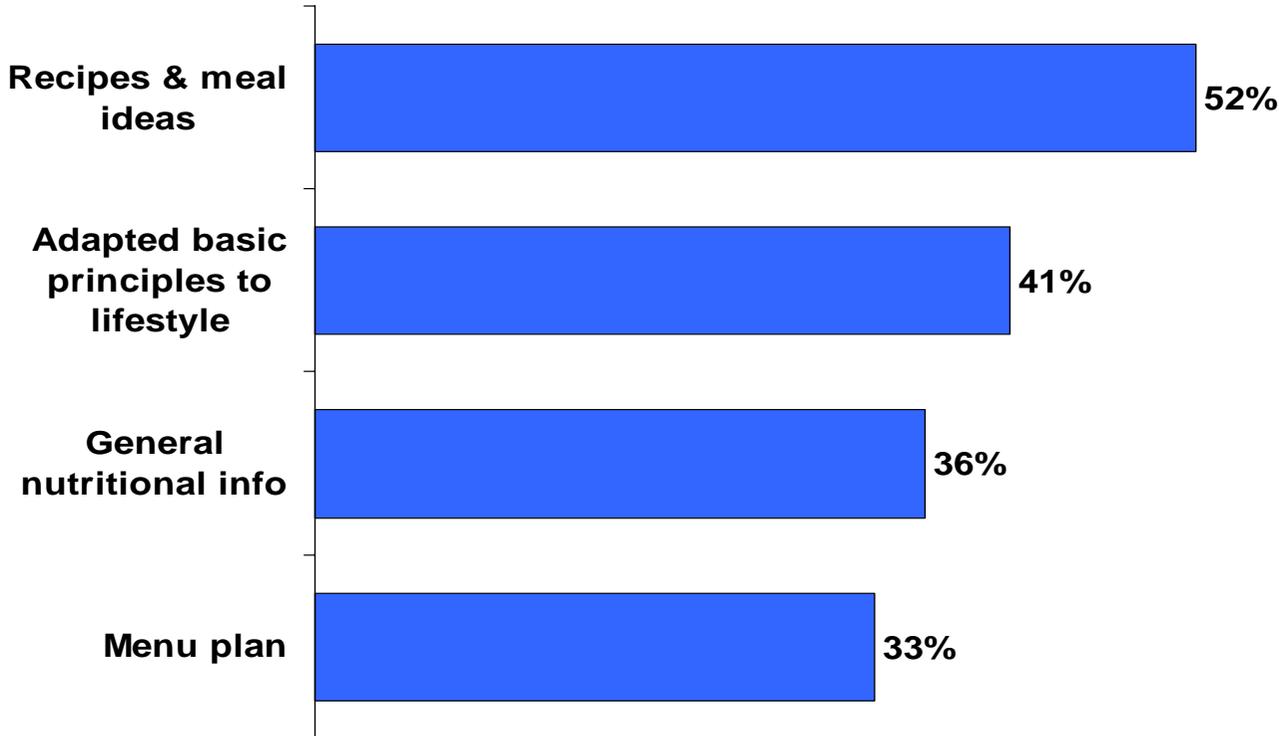


Level of detailed knowledge is clearly higher for those who have used TWD

There is also a high level of trust amongst those who have used TWD, which will continue to encourage word of mouth

n=378 – personal users
Q9. What are your impressions of CSIRO TWD?





More likely to be 60+

Mainly those not concerned about weight issues (48%) or trying to maintain weight (60%)

18-24s (46%)

TWD is being used in a number of different ways. Younger groups tend to be looking for general advice and information about nutrition and health – this is an opportunity to direct this kind of message to these groups encouraging patterns of diet and nutrition for the long term

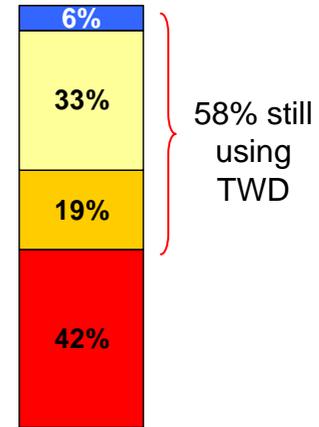
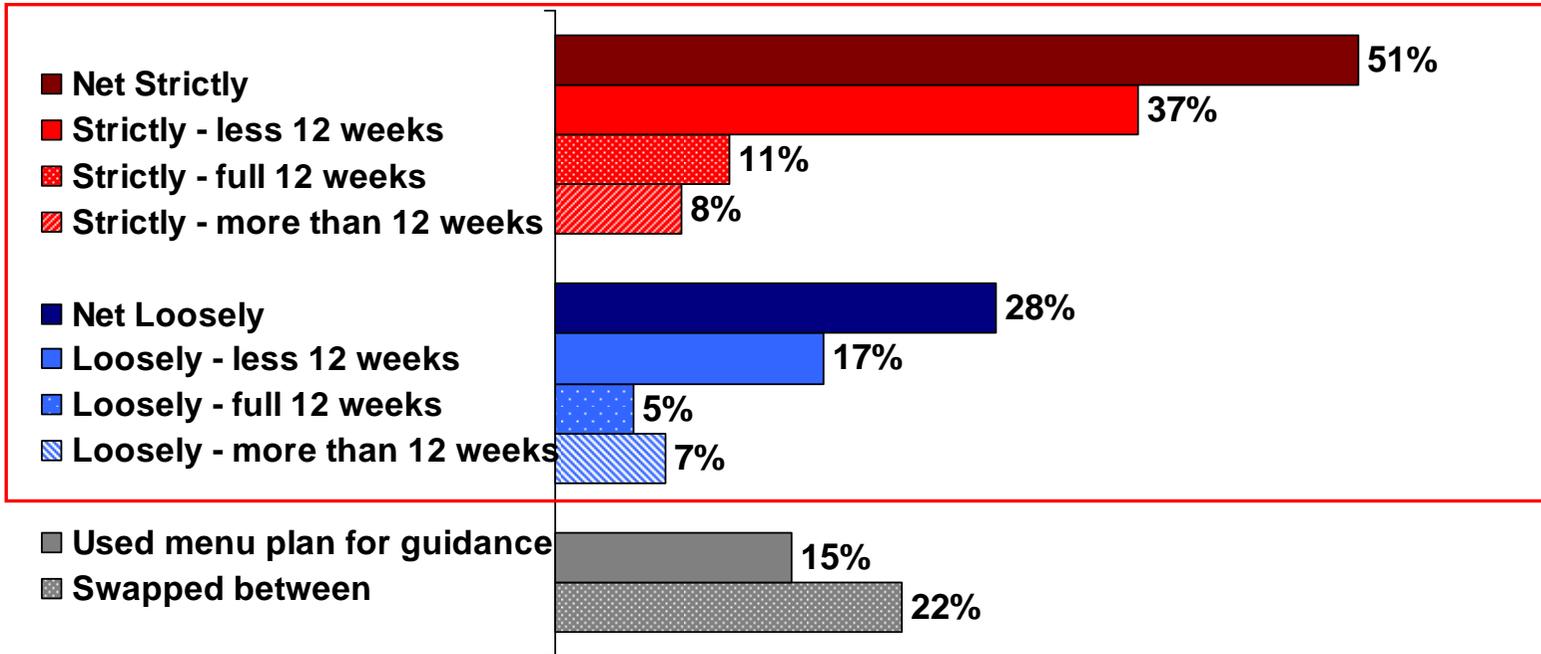
n = 504 used

Q12. Which of the following describes the way you used TWD?



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Those following the menu plan...



- Still carefully following the plan
- Still loosely following the plan
- Still using menu for guidance
- No longer using

n = 114
 Q15. Are you still following the menu plan either loosely or carefully?

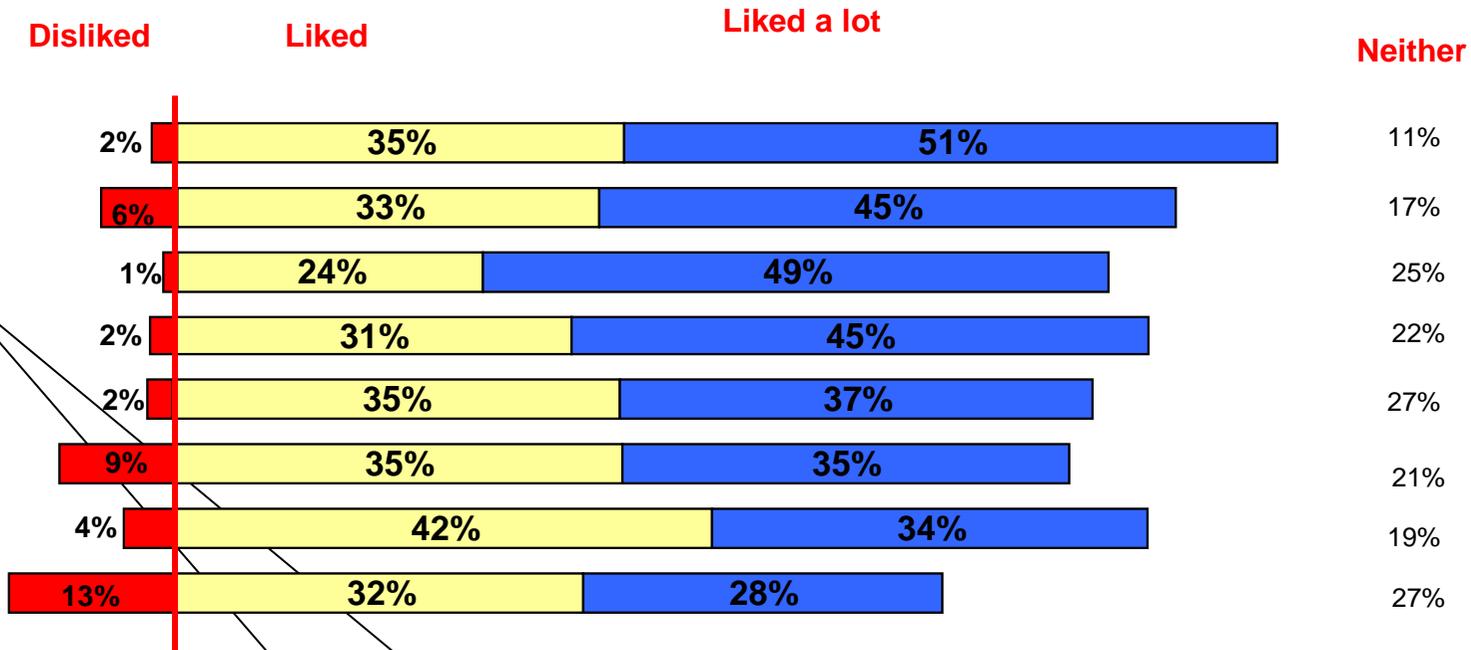
n = 173
 Q14. For how long, and in what way did you follow the menu plan? (MR)

Most people followed the plan strictly but were more likely to drop out prior to the 12 weeks. Only 1 in 5 of these switched to loosely following the plan

15% look to TWD for guidance on general health and nutrition indicating flexibility in the way people perceive and use TWD. This is the message most appropriate for reaching groups less interested in weight issues

What do they like about it?

25-39 and those trying to loose weight



60+

Structured eating plans

Information on weight maintenance

The CSIRO Brand

Flexibility with food and lifestyle

Recipes

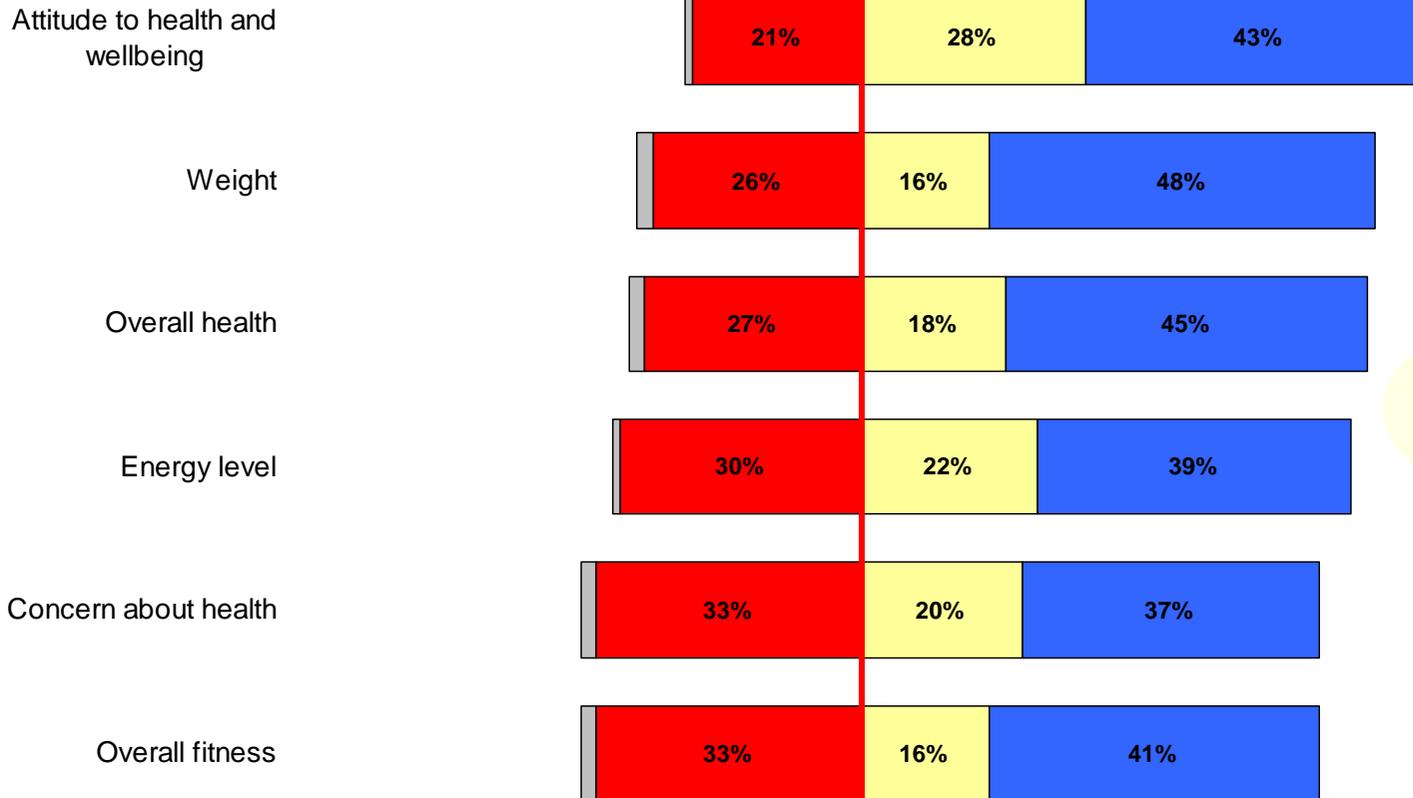
Those extremely careful about nutrition & 40-59s

n = 416 used (online only)
 Q13. How much did you like or dislike the following aspects of the diet?

Women are most likely to feel positively towards the shopping lists, recipes and structured eating plans



Worsened No change Improved a little Improved a lot



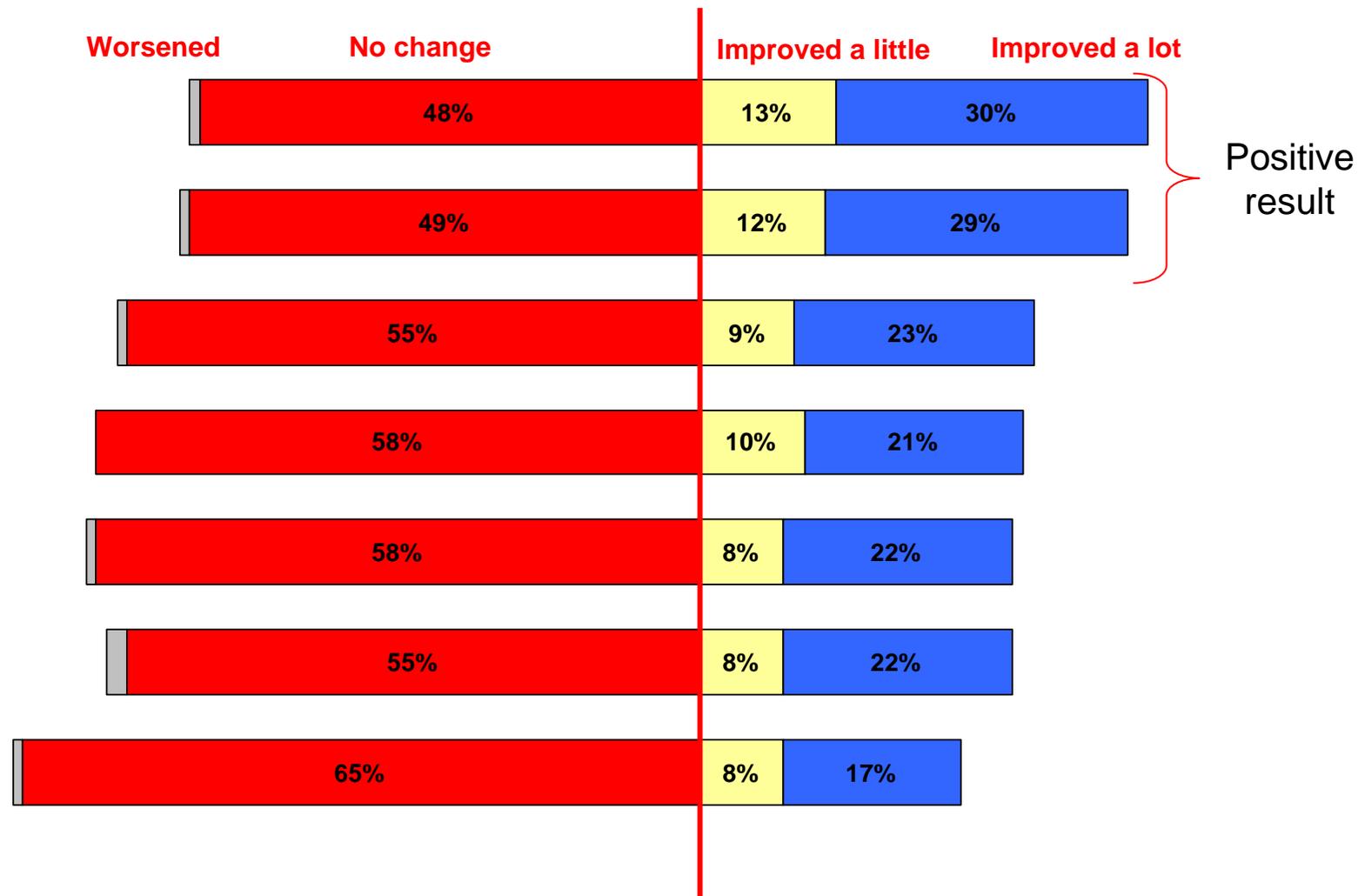
Overall attitudes towards health and fitness have improved along with weight and energy level

64% have had a positive experience with weight issues as a result of the diet – particularly those trying to maintain weight

n = 504

Q18. Since using TWD, what have been the effects or changes you've noticed on the following factors in your life?

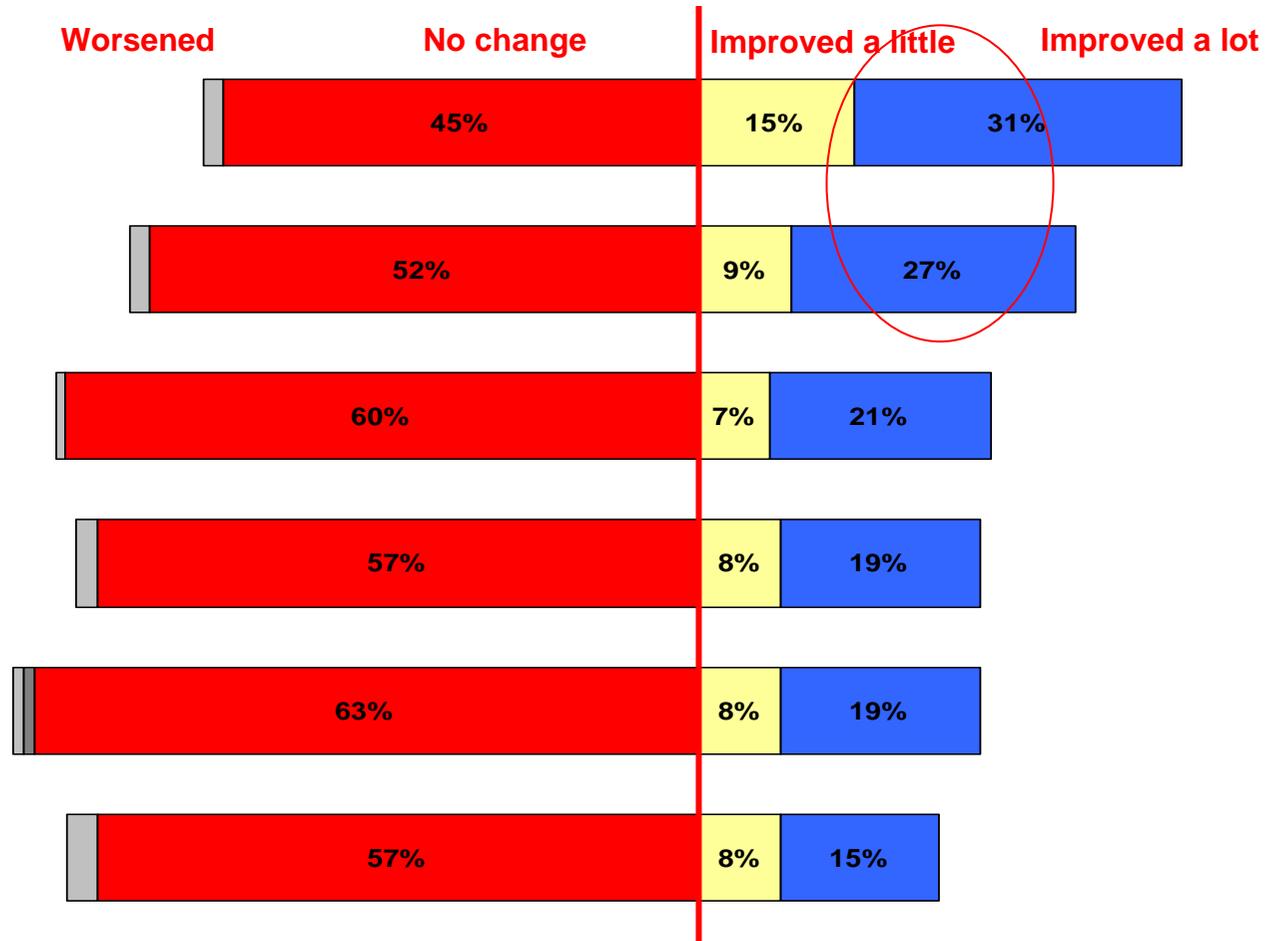




n = 504

Q18. Since using TWD, what have been the effects of changes you've noticed on the following factors in your life?



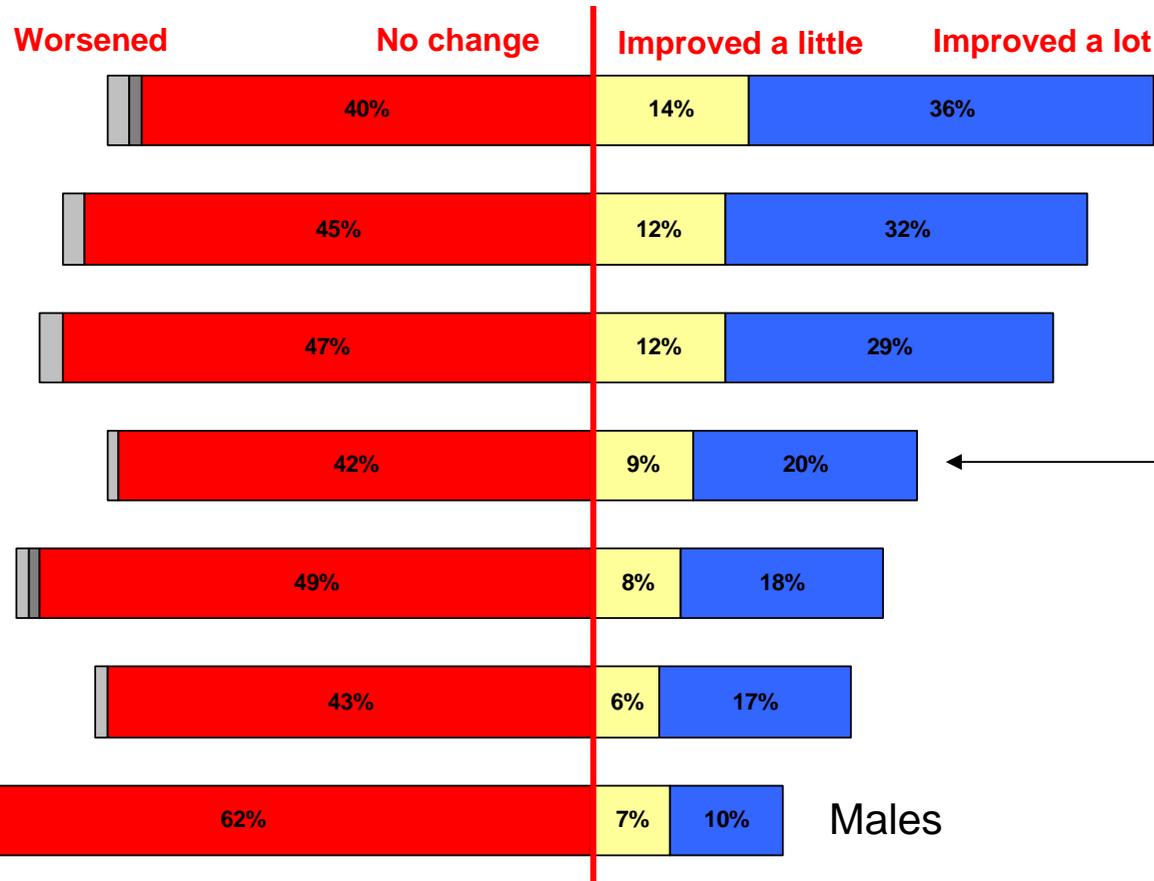


n = 504

Q18. Since using TWD, what have been the effects of changes you've noticed on the following factors in your life?



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Most likely trying to maintain weight

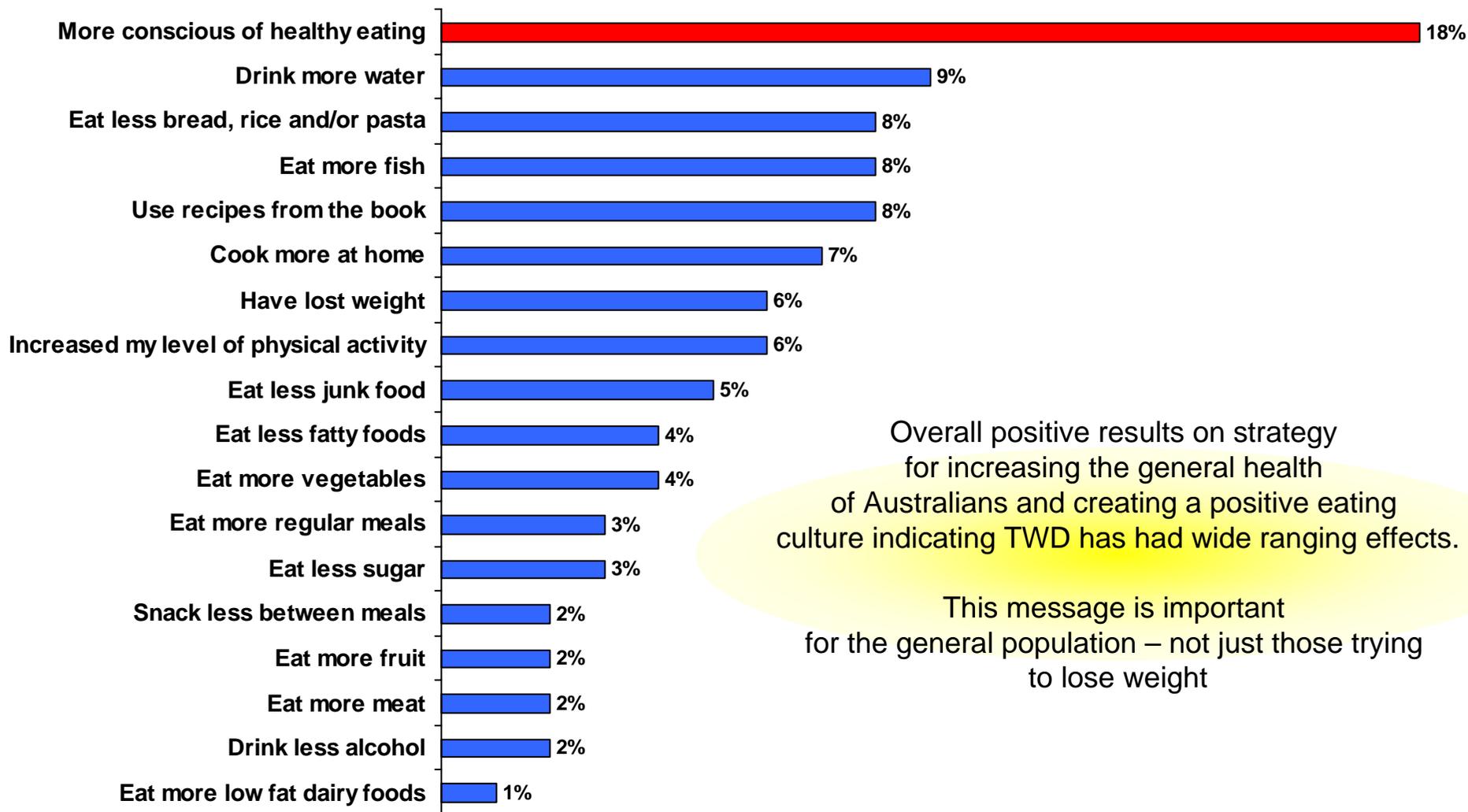
Males

n = 504

Q18 Since using TWD, what have been the effects of changes you've noticed on the following factors in your life?



The biggest change to people's lives



Overall positive results on strategy for increasing the general health of Australians and creating a positive eating culture indicating TWD has had wide ranging effects.

This message is important for the general population – not just those trying to lose weight

n = 349

Q17. And what is the biggest change you have made as a result of TWD?

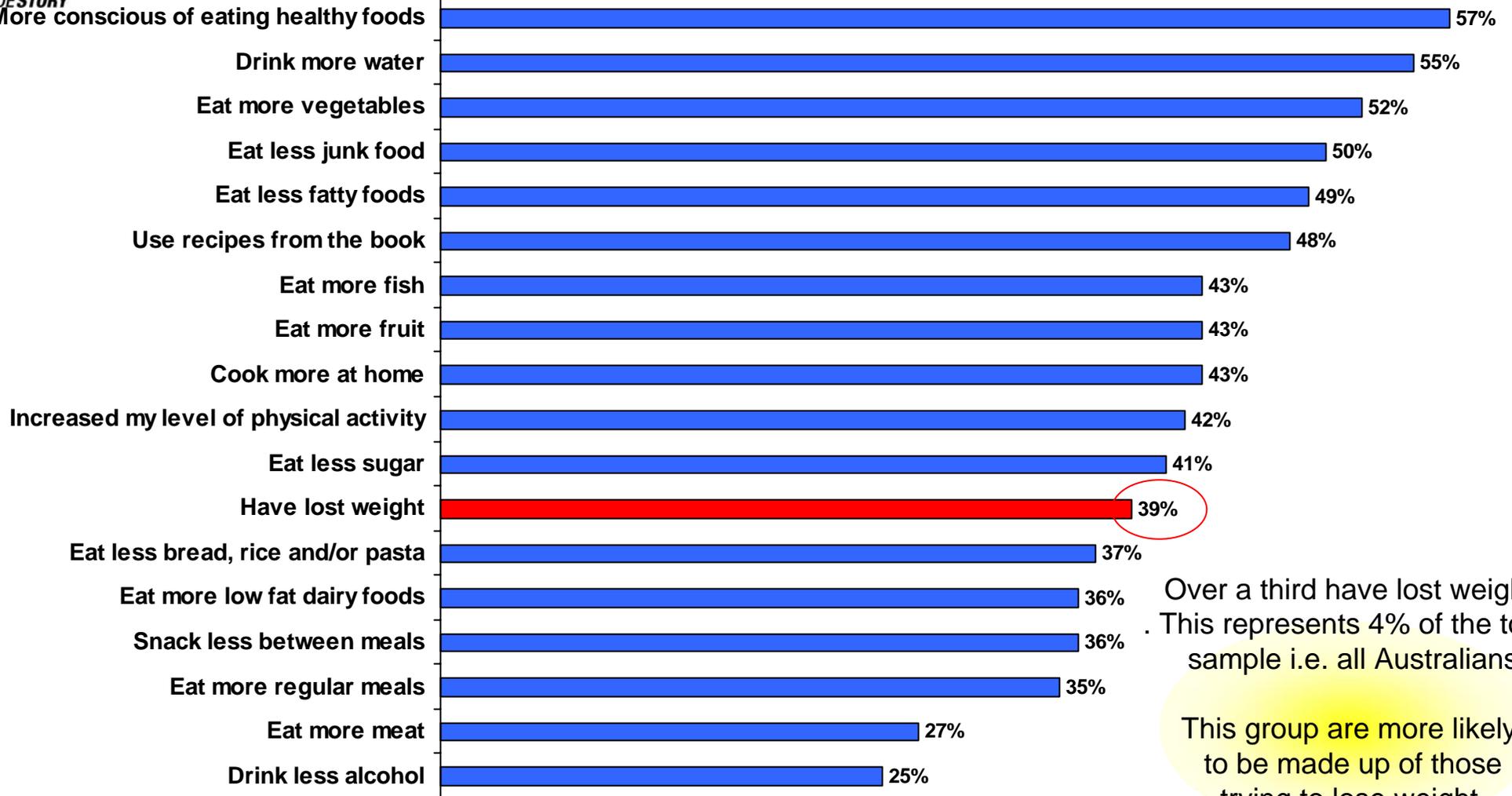


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Other changes to people's lives



INSIDESTORY



Over a third have lost weight . This represents 4% of the total sample i.e. all Australians

This group are more likely to be made up of those trying to lose weight and those in regional areas



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n = 504 - users
Q16a. Which of the following changes have you made as a result of TWD?

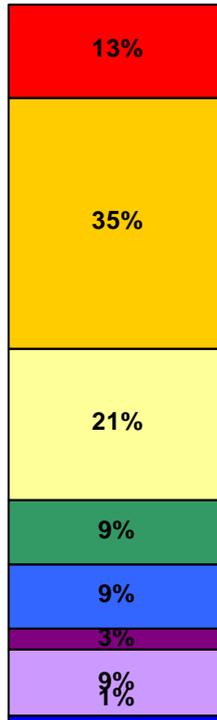
Project Vitality, 1884 November 2006

Commercial in confidence

How much weight?

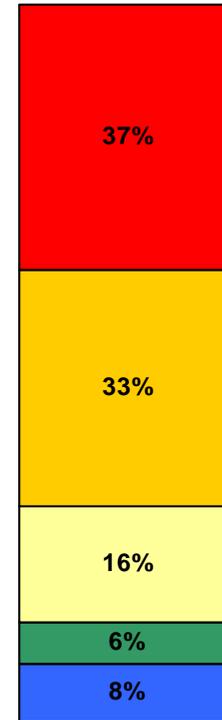
39% have lost weight – while 61% have not

...or may have put it in on again!



- 1-2kg
- 3-4kg
- 5-6kg
- 7-8kg
- 9-10kg
- 11-12kg
- More than 12kg
- Don't know/NA

Average amount of weight lost 6.1kg (conservative estimate)



- Less than 3 months
- 3 - 6 months
- 6 - 9 months
- 9 -12 months
- Greater than 12 months

Recent losers could be monitored overtime to get a more meaningful read on maintaining weight loss

n=194 Lost weight

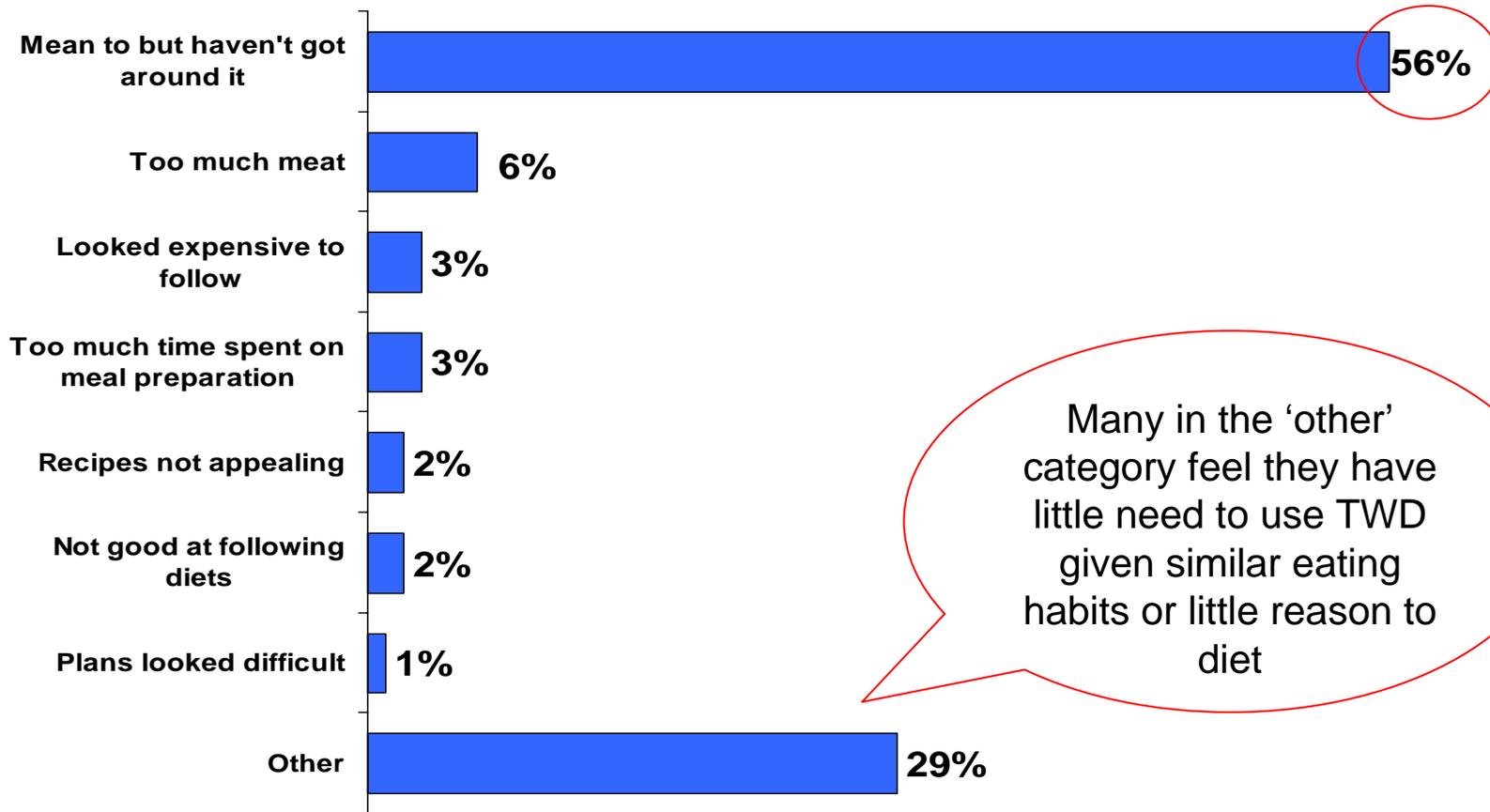
Q16b. Approximately how much weight have you lost since using TWD?

n=194 lost weight

Q16c. Approximately how long have you maintained this weight loss?



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Many in the 'other' category feel they have little need to use TWD given similar eating habits or little reason to diet

n = 89

Q20. What has stopped you from using TWD?

Main barrier to usage is procrastination rather than any particular issue with TWD itself.

Promotion of overall health and wellbeing messages could help migrate many in this 'other' category towards usage



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Purchase behaviour

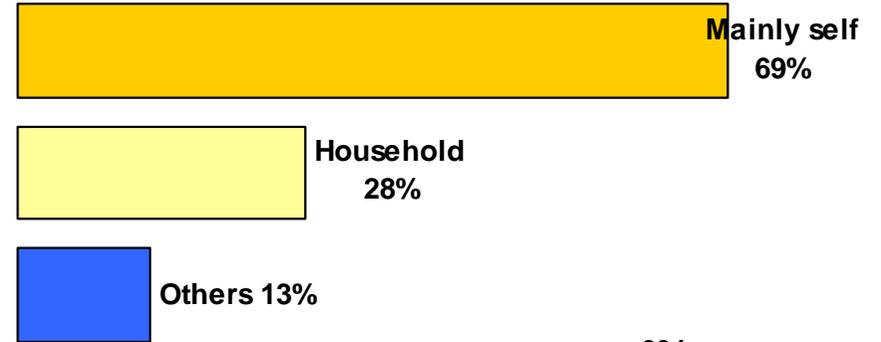


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Represents approximately 6.6% of the total sample i.e. all Australians 16-65

For whom did you purchase TWD?



n = 334
Q25. for whom did you purchase that copy?

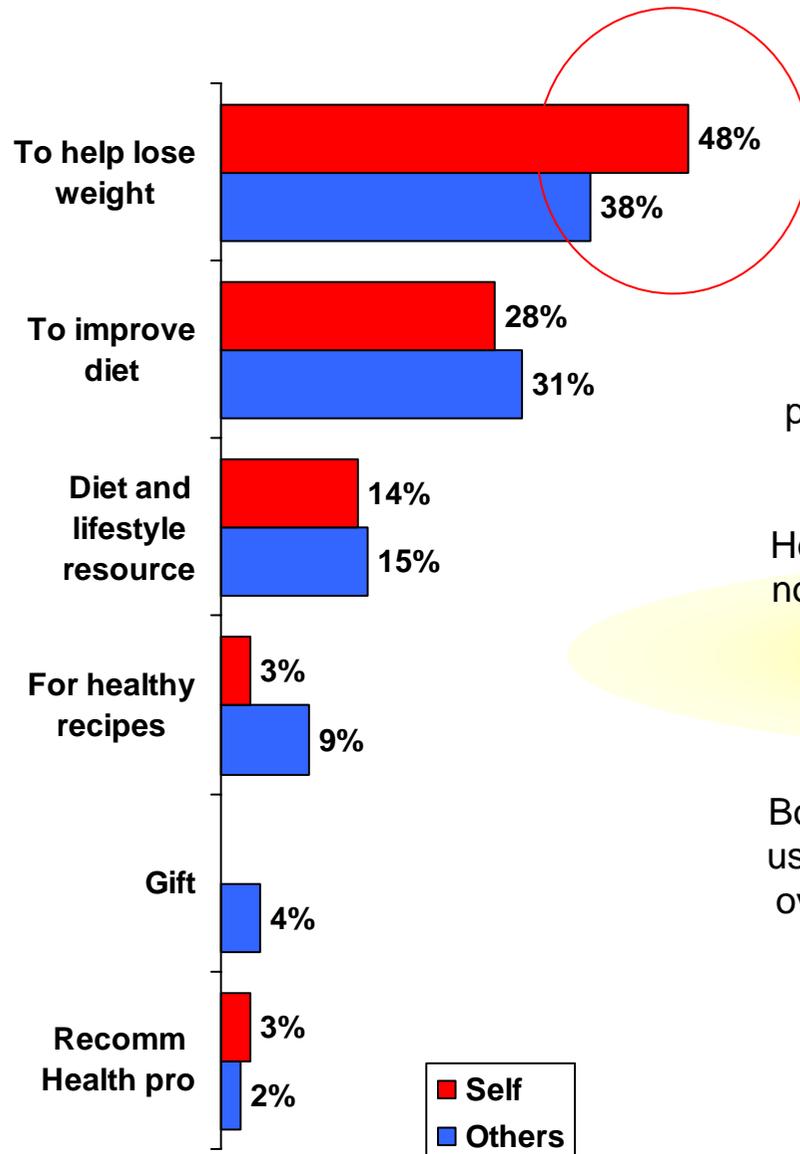
A large majority purchased TWD for themselves and household.

Some have purchased more than one copy!

n = 3326 those aware
Q24. Have you ever purchased a copy of TWD?



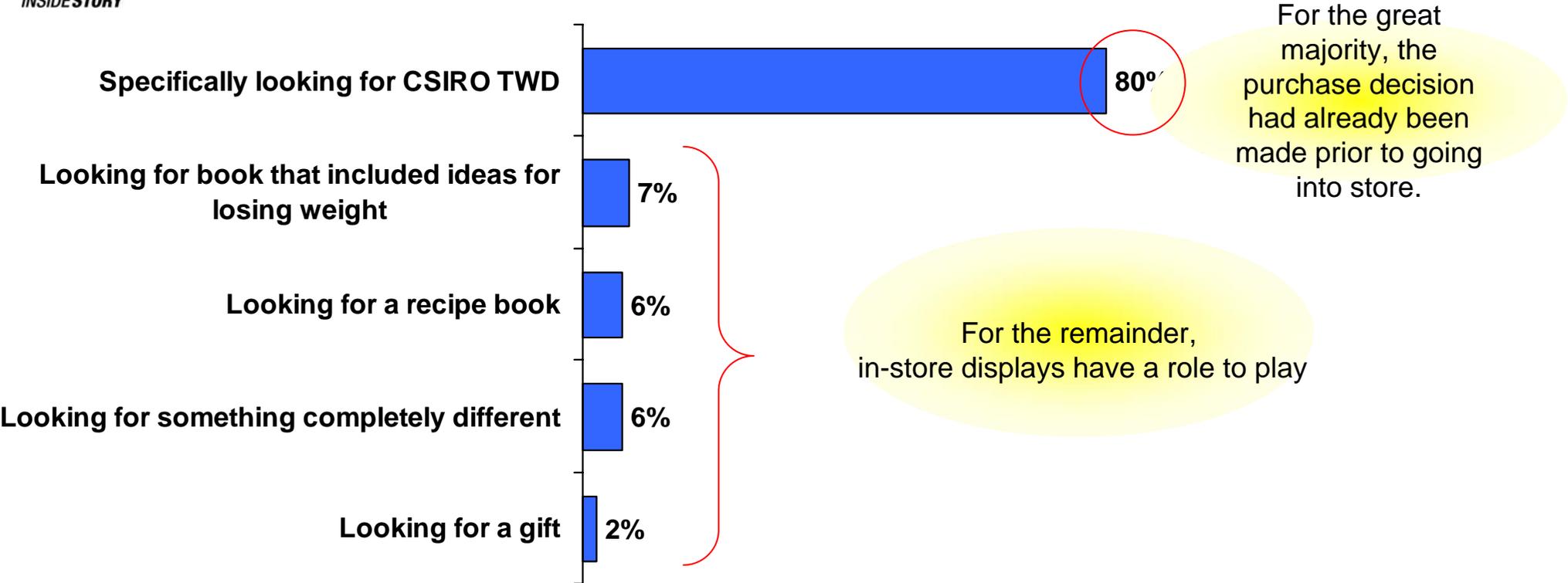
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Weight loss is the main hook for encouraging purchase. This message is key to achieving buy-in of TWD.

However, of all those who've used the diet, the main noted change as a result is an increased awareness of healthy eating – indicating a strong leaning towards considering TWD a general diet and lifestyle resource.

Both messages are key to increased awareness and usage. The more general message has wider appeal overall and could work to reach less weight focused groups

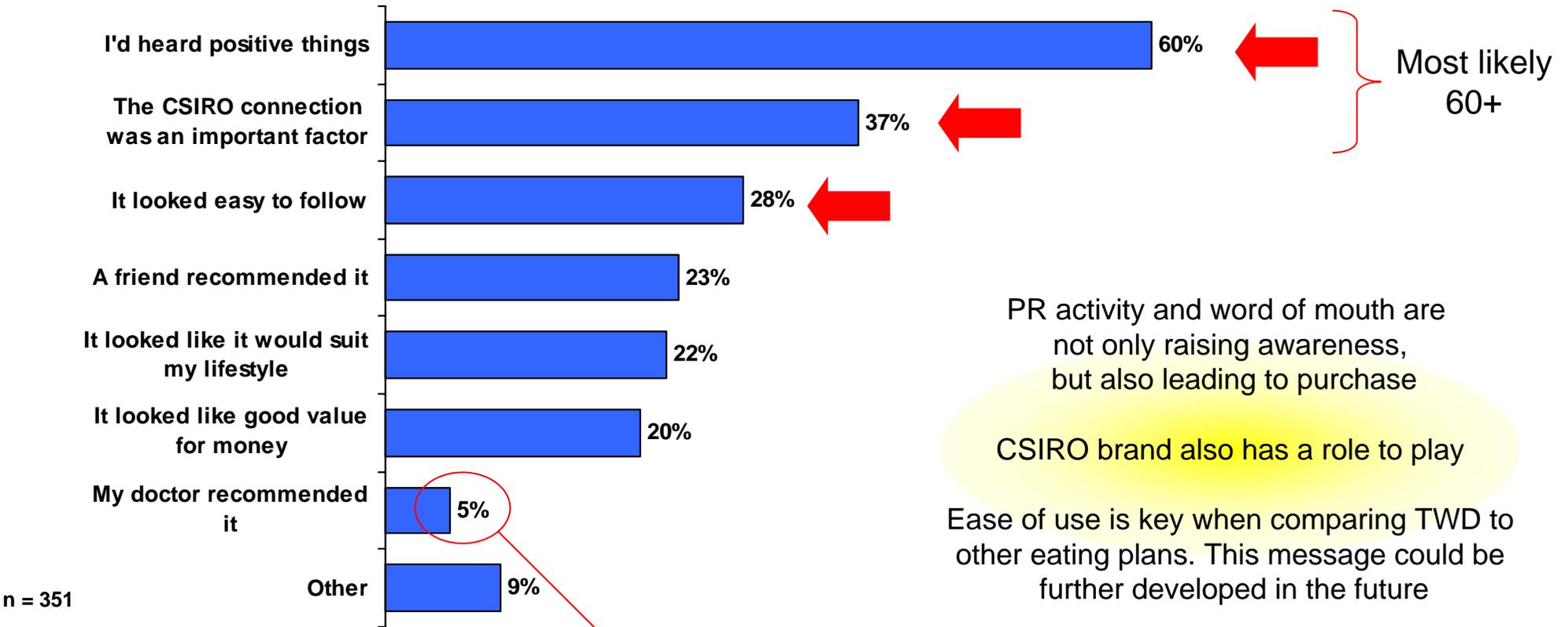


n = 292 purchased

Q28 When you first went into store, what were your original intentions (when you purchased TWD)?



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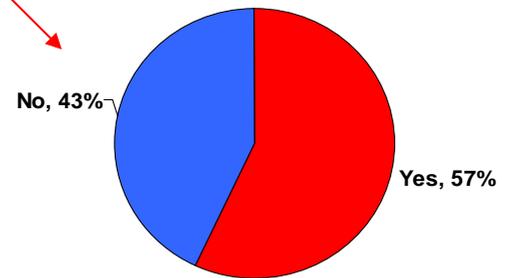


n = 351
 Q29a Why did you decide to purchase TWD over similar options?

PR activity and word of mouth are not only raising awareness, but also leading to purchase

CSIRO brand also has a role to play

Ease of use is key when comparing TWD to other eating plans. This message could be further developed in the future



n = 17
 Q29b Was there a specific condition in mind?

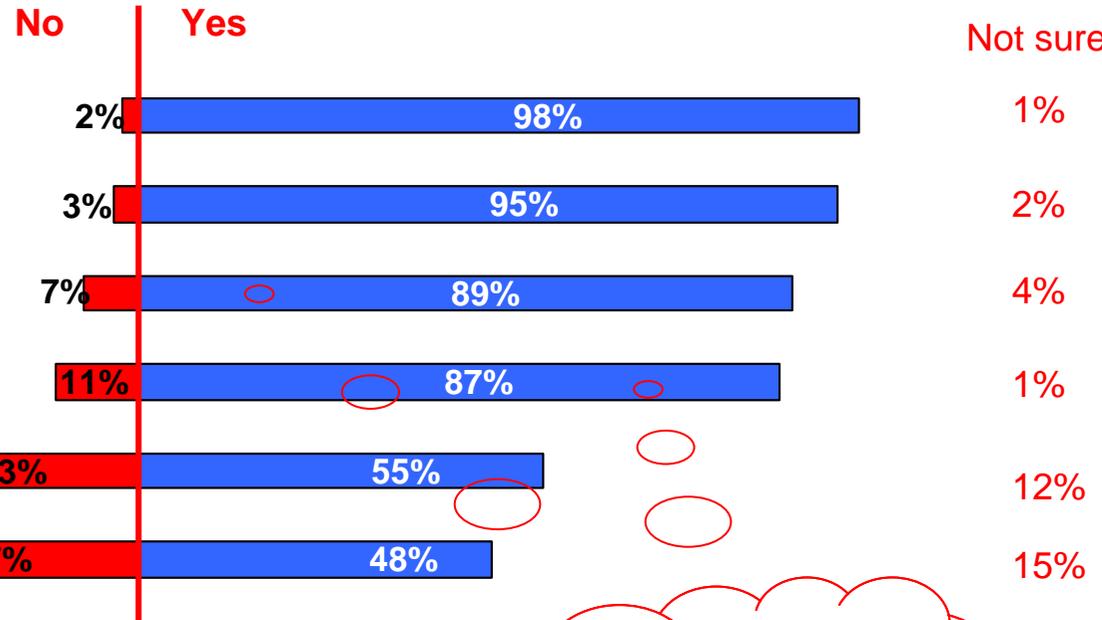


The CSIRO Brand



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The National Heart Foundation
The Cancer Council
The Australian Medical Association
60+ CSIRO
Department of Health and Ageing
Dietitians Association of Australia



Most likely female and regional

Most likely to be older groups 40-59 and 60+

Awareness of the CSIRO is high along with awareness for the Heart Foundation, Cancer Council and the AMA.

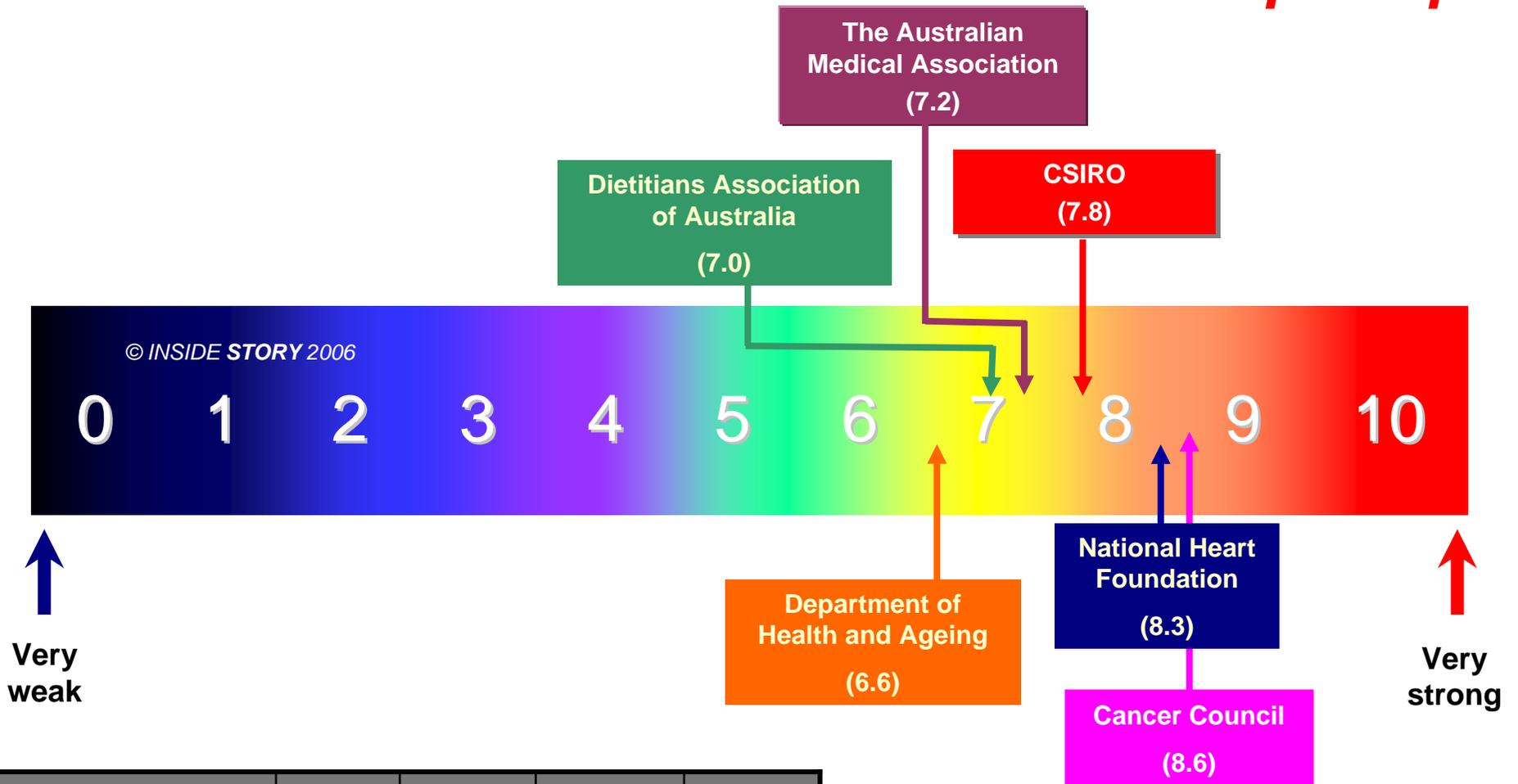
n = 5026 Total

Q33. Before today, have you heard of the following organisations?



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Overall perception

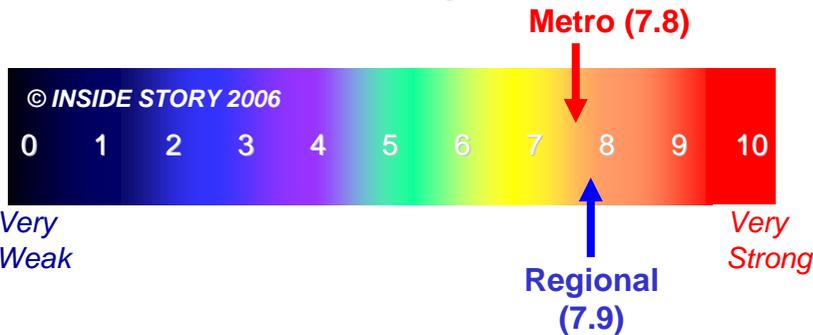


	Total	Respect	Trust	Credible
CSIRO	7.8	7.8	7.6	8.0
AMA	7.2	7.3	7.1	7.3
National Heart Foundation	8.3	8.4	8.2	8.4
Cancer Council	8.6	8.6	8.5	8.6
Dept Health & Ageing	6.6	6.7	6.5	6.6
Dietitians Assoc of Aust	7.0	7.0	6.9	7.0

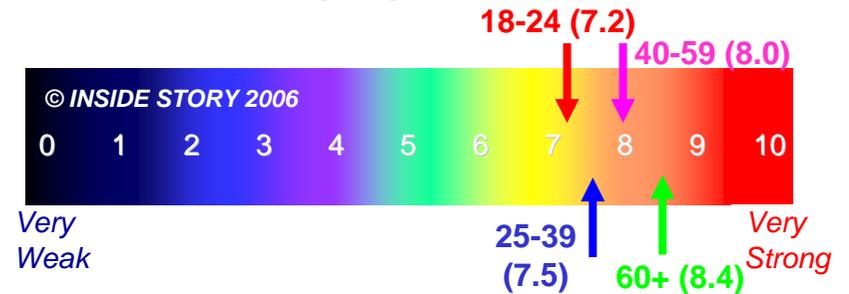
n = 4001 Online only

Based on Trust, Credibility & Respect

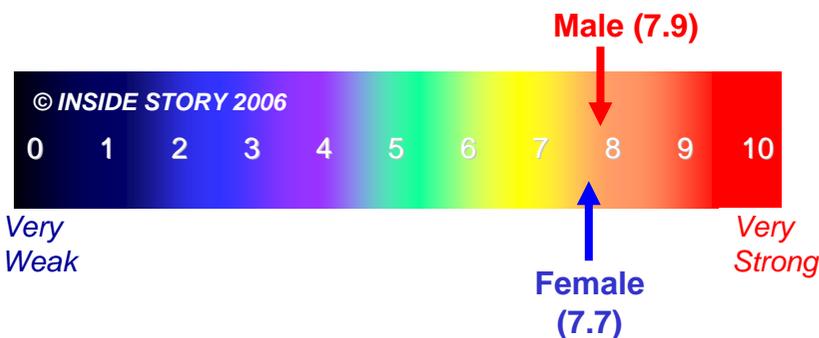
Metro / Regional



Age groups

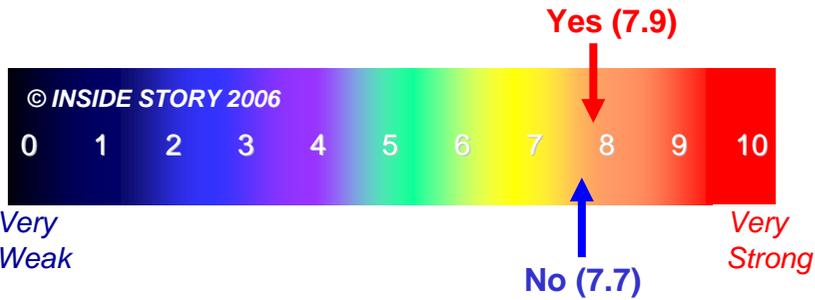


Gender

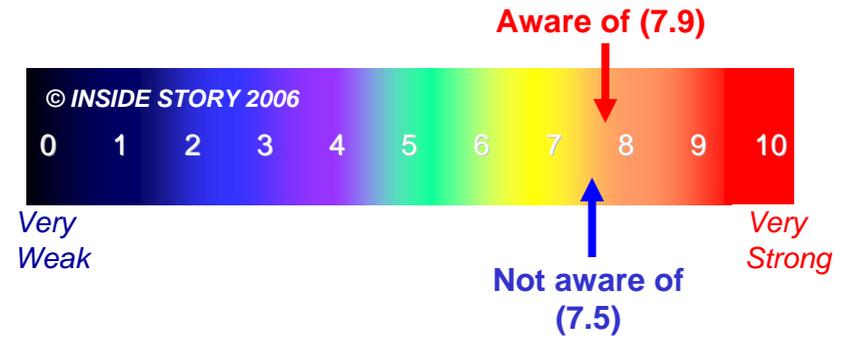


Few demographic differences although older groups tend to feel more positive.

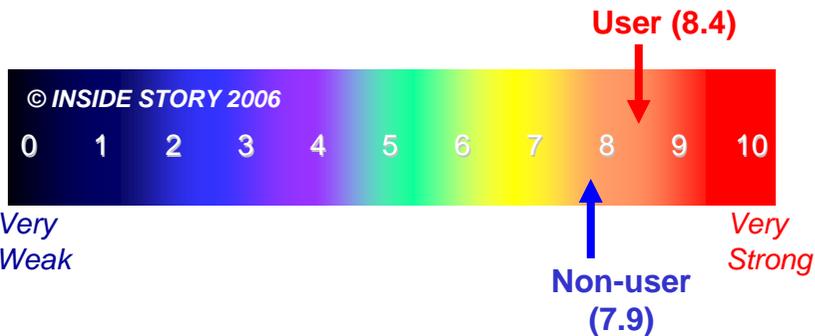
Ever dieted



Aware of TWD

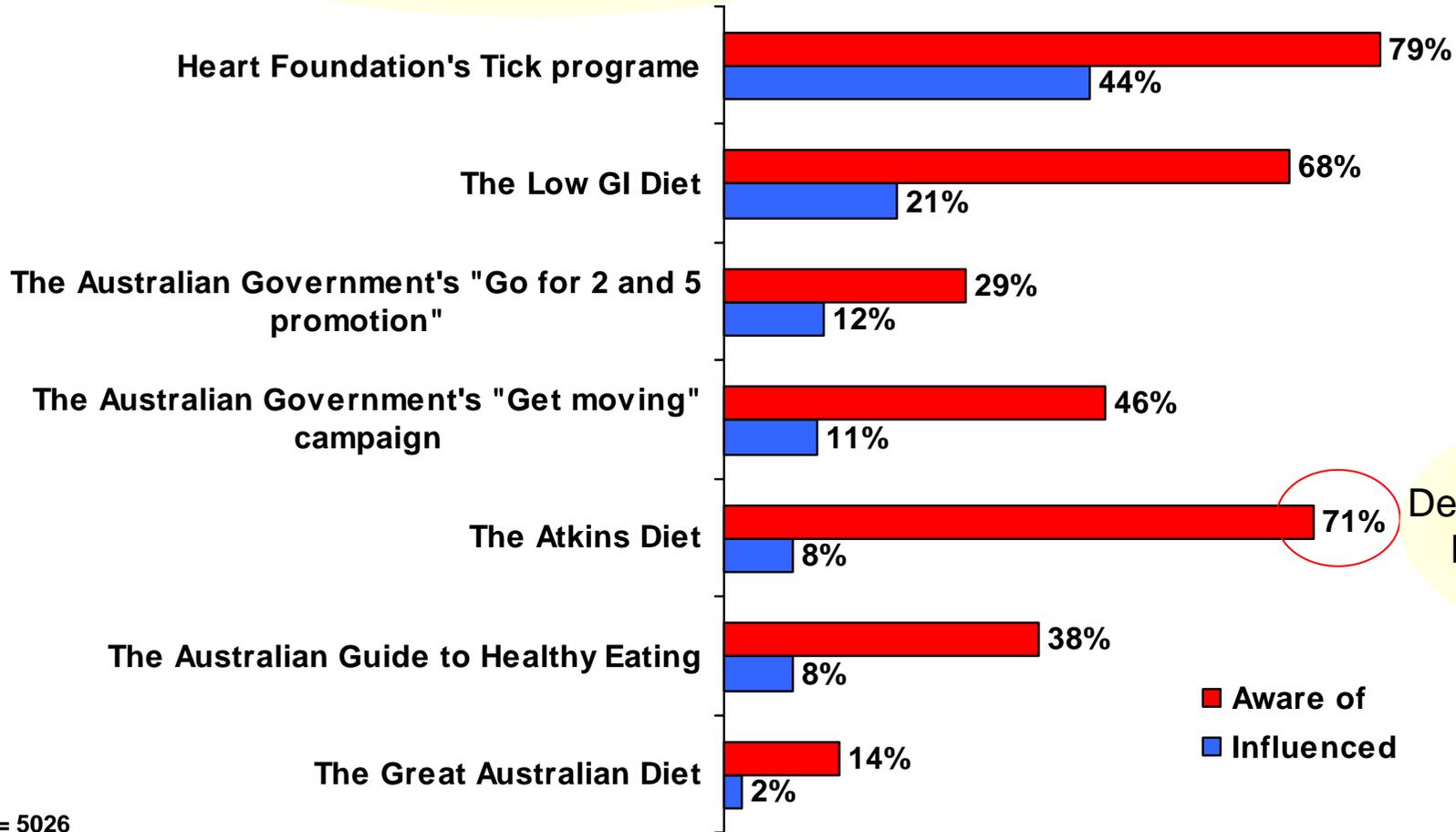


Users of TWD



Those that have used TWD tend to feel more positive towards CSIRO

CSIRO:
65% awareness
10% influence (used in household)



Despite high awareness, low influence overall

■ Aware of
■ Influenced

n = 5026

Q35a,b Which of the following a) are you aware of and b) have influenced your choices or behaviour?



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The way forward



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- ◆ Given the topical nature of the obesity and overall health and wellbeing message in the general media, coupled with the lack of specific barriers to uptake of TWD, this augers well for the future – new audiences and users and even potential new markets
- ◆ To date the main hook for up-take of TWD is the weight loss message. However, usage suggests that the secondary message – *TWD as a general guide to healthy eating and nutrition* - could take precedence in the media to appeal to a broader audience
 - ✦ With increased media attention on issues relating to obesity, less obvious groups such as those less concerned with weight loss/maintenance, would find TWD useful as a general resource for meals and nutrition for themselves and their families
- ◆ Australians are looking for eating plans and diets that are easy to use, flexible and easy to understand – all of which relate to TWD
 - ✦ Promoting a less rigid approach to the diet – stressing the flexibility of menu plans and using the plan as a general guideline to nutrition may boost continued involvement
 - ✦ Strengthening these messages could help broaden the overall audience
- ◆ Specific segment issues and opportunities for specific message targeting:
 - ✦ 18-24s are more likely to be looking for general information and advice about nutrition – establishing patterns of healthy eating for this group is an investment in the health and nutrition of the Australian population of the future. Specifically using the overall health and wellbeing message would appeal to this group
 - ✦ 60+ more likely to be concerned about overall health issues – promoting TWD as a general guide to health and nutrition would appeal to this group as they tend to be focused on keeping healthy overall and may have specific health conditions



- ★ Family groups are often caught up in busy lives involving work/school/family. Messages such as the following provide opportunities to target this group specifically
 - ◆ TWD is convenient and easy to use
 - ◆ TWD is easy to understand
 - ◆ TWD fits with my lifestyle and that of my household
 - ◆ TWD includes food I like
 - ◆ The diet is flexible in the foods I can eat
 - ◆ The foods in TWD are easily available
- ◆ Many users look to TWD for guidance on general health and nutrition indicating flexibility in the way people perceive and use TWD. This is the message most appropriate for reaching groups less interested in weight issues and those who may be concerned with the difficulty in following diets
- ◆ The media and booksellers have been supportive and have worked to build awareness and continued interest in TWD
 - ★ Maintain a positive relationship with these groups and continue to provide good news stories
- ◆ For all Australians, the key message could be a combination of these things:
...that TWD is a general guide to food and nutrition that is easy to use and appropriate for me and my family



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- ◆ Very positive result in relation to the way CSIRO brand is perceived
 - ✦ Australians believe in CSIRO – they accept messages from CSIRO at face value (*an organisation I trust*)
 - ✦ The public believes CSIRO has researched the information it releases - that there is science that backs up this information (*that CSIRO is a credible organisation*)
 - ✦ There is a lack of controversy surrounding CSIRO in the eyes of the public (*an organisation I respect*)
- ◆ The trustworthy and credible perception of the CSIRO brand provides a strong basis to continue to provide wellbeing and health information to the general public – particularly with the strong awareness already in the market
 - ✦ Messages from CSIRO are well received with little negative back-lash overall
 - ✦ A continued presence in the market by CSIRO would only cement the positioning of the organisation as the most trusted and respected science and technology organisation - a leader in providing unbiased and useful information about health and wellbeing to the overall population
 - ◆ It would also provide a reputable brand name that stands out amongst the plethora of information about diets and general nutrition
 - One that is a local source and relevant to the Australian lifestyle and environment



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QUANTITATIVE QUALIFIER

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