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Dairy Australia

**2004 Food of Life Post Campaign
Tracking Research Study (Wave 2)**

Study No. 13973

May 2004

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Executive Summary

The report discusses the findings for the second wave of the 2004 Dairy Food of Life tracking study conducted after the first flight of advertising. The purpose of the research is to monitor shifts in attitudes, knowledge and behaviour with respect to dairy, in order to measure the efficacy of the advertising campaign.

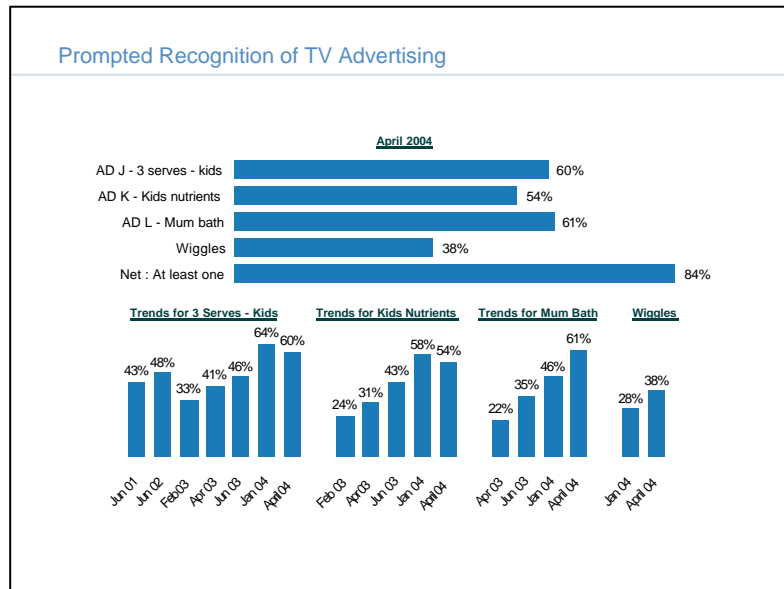
The most noteworthy finding of the current research is that active avoidance of dairy for children has declined significantly since the January 2004 wave. However, we continue to observe less favourable attitudes towards dairy on a number of key essentiality and behavioural measures in terms of adult and children's consumption.

In the pages to follow we highlight the key research findings for this wave which consisted of 200 household based interviews with mothers under 40.

Advertising and Promotional Initiatives

Four TVC executions were tested in this wave – 3 Serves, Kits Nutrients, Mum Bath and the Wiggles. As shown below, 84% recognised at least one of the four executions with 3 Serves (60%) and Mum Bath (61%) edging just ahead of Kids Nutrients (54%). Close to four in ten recognise the Wiggles TVC.

Trends reveal increased recognition for Mum Bath and the Wiggles, while results for 3 Serves and Kids Nutrients have held firm at the buoyant January 2004 benchmark levels...



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Sponsorship of the Wiggles ad shows continuing strong ownership by dairy...

Sponsorship Awareness of Wiggles CSA

	January 2004	April 2004
Meat/fish/poultry	-	9%
Dairy products	84%	75%
Fruit and vegetables	9%	11%
Breads/cereals/rice/pasta	29%	38%
None/don't know	6%	9%

Base = Recall ad (n=56/76)

Some four in ten recalled the Fresh program, marginally down on the 46% reported in January 2004. Sponsorship awareness for dairy has held firm and as such exceeds the other categories by a sizeable margin...

Fresh: Awareness and Sponsorship

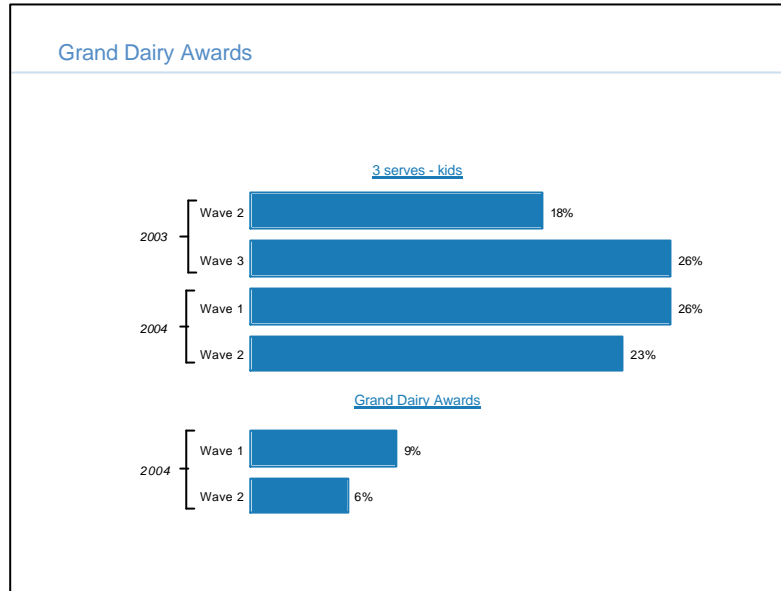
	January 2004 (200)	April 2004 (200)
Watched Fresh Program:		
Yes	46%	39%
No	54%	61%
(If Aware)	(92%)	(77%)
Sponsor:		
Meat/fish/poultry/eggs	38%	29%
Dairy products	41%	42%
Fruit and vegetables	36%	29%
Breads/cereals/rice/pasta	24%	14%
None/don't know	40%	48%

Q. Have you ever watched the TV program called 'Fresh' on Channel 9?
Q. Which, if any, of these types of foods sponsor the Fresh program?

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Recognition of the Three Serves and Grand Dairy Awards devices was also tested in the current research. Results are as follows...



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Attitudes Towards Dairy Foods

Respondents were asked the extent to which they agreed or disagreed with a series of statements about dairy foods. In the table below we compare the results with the 2003 campaign and the 2004 January benchmark...

Attitudes towards Dairy Foods Trends

	Agree Strongly					Total Agree				
	2003			2004		2003			2004	
	W1 %	W2 %	W3 %	W1 %	W2 %	W1 %	W2 %	W3 %	W1 %	W2 %
Dairy foods are essential for the growth and development of my children	75	78	80	80	77	97	96	99	97	96
Dairy foods are essential for my own health and well being	56	60	58	59	57	92	95	93	97	92
Dairy foods contain a very wide range of vitamins and minerals	43	49	54	44	40	88	94	94	91	91
I'd be very reluctant to cut down the amount of dairy food my children consume	65	67	77	73	65	92	92	95	92	87
The vitamins and minerals in dairy food occur naturally	37	41	40	42	36	83	88	85	88	75
I'd be very reluctant to cut down on dairy foods	37	39	41	47	37	76	78	78	83	72
If I don't consume dairy foods it will be detrimental to my health	27	30	33	37	32	61	74	62	79	71
If you don't want to consume dairy foods you can easily get the vitamins and minerals from other sources	16	14	17	18	16	58	55	46	60	58
All dairy foods are fattening	N/A	N/A	4	9	4	N/A	N/A	20	34	26

2004 Food of Life Post Campaign Tracking Research Wave 2

The most noteworthy shifts are...

- A further modest decline in the proportion who agree strongly that 'dairy foods contain a very wide range of vitamins and minerals'. The current result represents a new low
- Less resistance to curtailing children's and personal dairy consumption coupled with reduced sensitivity to detrimental health consequences from insufficient dairy consumption
- Less favourable perceptions concerning the naturalness of dairy.

The table below examines longer term attitudinal trends.

The universal view that 'dairy foods are essential for the growth and development of children' has been unassailable throughout the course of the research.

At a slightly lower level we note a similar pattern of results for the 'wide range of vitamins' and 'essentiality for personal health and well being'.

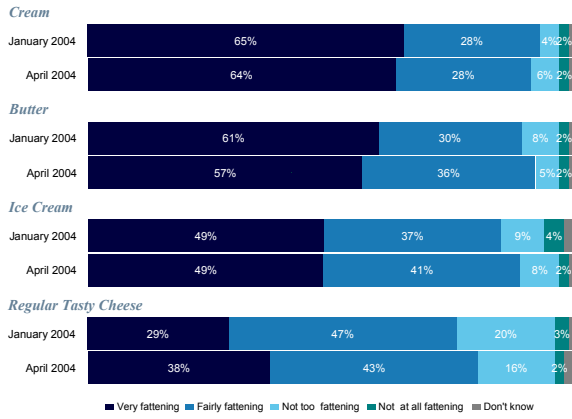
The current results for 'naturalness' and 'reluctance to cut down' on personal and children's consumption are lower than historical levels.

Current results for the substitutability of dairy are in line with those of January 2004 – though they are less favourable than those for June 2003, when agreement levels were at their lowest.

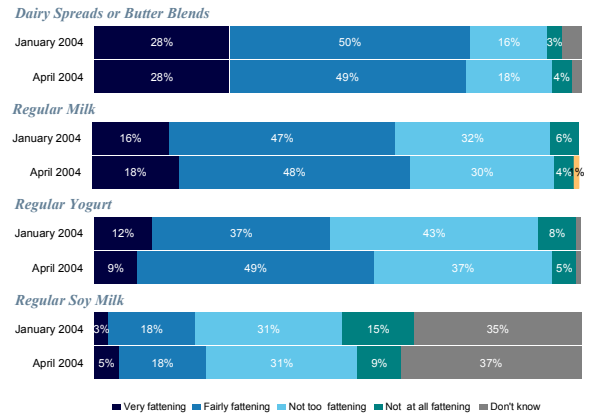
	2001		2002	2003			2004	
	Feb %	Jun %	Jun %	Feb %	Apr %	Jun %	Jan %	Apr %
Dairy foods contain a very wide range of vitamins and minerals	90	95	90	88 →	94	94	91	91
The vitamins and minerals in dairy foods occur naturally	79	91	76 →	83 →	88	85	88 ←	75
Dairy foods are essential for my own health and well being	91	96	92	92	95	93	97	92
If you don't want to consume dairy foods you can easily get the vitamins and minerals they contain from other sources	67 ←	59	58	58	55 ←	46 →	60	58
I'd be very reluctant to cut down on dairy foods	77	78	68 →	76	78	78	83 ←	72
If I don't consume dairy foods it will be detrimental to my health	N/A	76	73 ←	61 →	74 ←	62 →	79 ←	71
Dairy foods are essential for the growth and development of my children	97	98	96	97	96	99	97	96
I'd be very reluctant to cut down the amount of dairy food my children consume	89	93	88	92	92	95	92 ←	87
All dairy foods are fattening	N/A	N/A	N/A	N/A	N/A	20	34 ←	26

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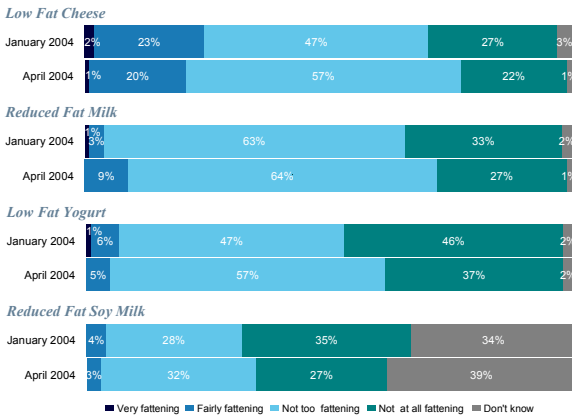
Perceptions of fattening in terms of impact on weight
Trends



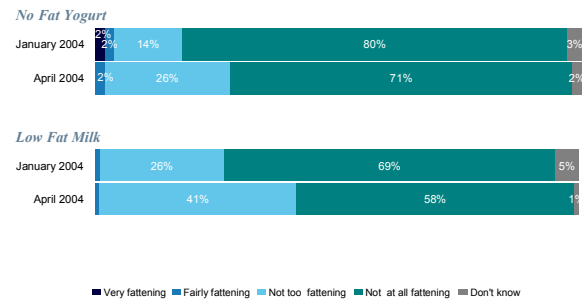
Perceptions of fattening in terms of impact on weight
Trends (cont)



Perceptions of fattening in terms of impact on weight
Trends (cont)



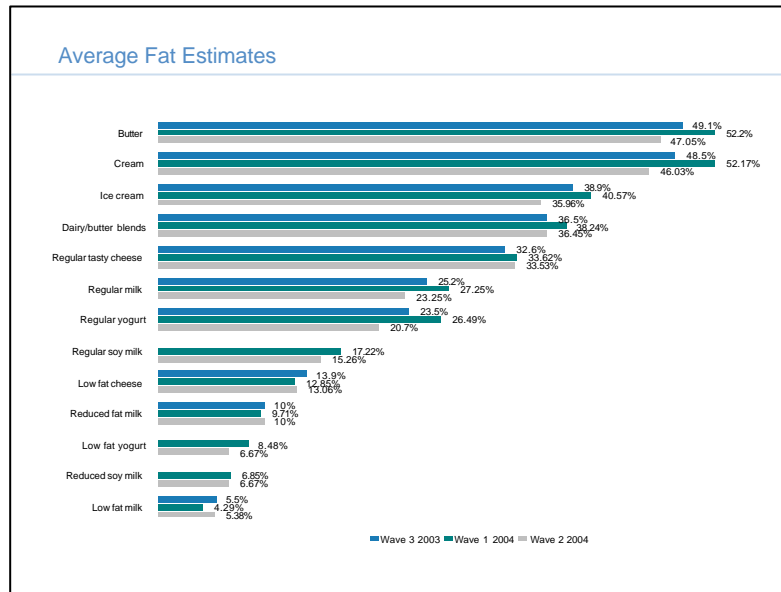
Perceptions of fattening in terms of impact on weight
Trends



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Fat Content: Knowledge and Attitudes

Respondents were asked to indicate the average fat content of a number of dairy products. The graph below shows the average estimates and compares results with Wave 3 2003 and the January 2004 benchmark...



We note that the fat content of regular milk and yogurt continue to be considerably overstated content (though average estimates for regular yogurt have declined marginally) – while the estimates for the higher fat products tend to be understated.

We suspect that the presence of two lower fat milk variants are exaggerating perceptions of the fat of regular milk and regular yogurt suffers because of the connection with regular milk and possibly the introduction of the no fat variant.

It is possible that for ice cream confusion between fat content and carbohydrates/sugar levels is elevating fat content estimates.

While estimates for the low fat milk variants are overstated we note that these are somewhat more accurate – probably attributable to the better informed health/weight conscious consumers of these products.

We asked respondents to indicate how fattening they perceived each of the products to be in terms of their impact on weight – by asking them to rate on a 4-point very fattening – not at all fattening scale. As shown opposite regular milk and yogurt, once again, attract a disproportionate number of ‘very or fairly fattening’ mentions relative to their fat content; no fat yogurt is deemed not at all fattening by 71% suggesting the potency of the no fat message. Results show increased ‘fattening’ perceptions for regular cheese, regular yogurt and low fat milk.

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To What Extent Do Perceptions of Fat Content Influence Product Consumption?

We classified respondents and their children as consumers (ever, at least weekly) and non-consumers and then cross-analysed this consumption data with average fat content estimates. The combined Wave 1 and Wave 2 samples were used.

The relationship between consumption and perceived fat content for regular milk and yogurt indicates that taste and perceived health benefits are stronger consumption motivators than fat concerns. For 'indulgence' products such as regular cheese, ice cream and butter there is some evidence to suggest that high frequency users provide more conservative fat estimates. This could be indicative of...

- 'Rationalisation' of indulgence
- Perceived benefits/enjoyment outweighing health concerns.

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To What Extent Is Consumption Behaviour Influenced by Perceptions of Fat Content?
Average Fat Estimates – January 2004 and April 2004 Samples Combined

	Personal Consumption			Children's Consumption		
	Ever %	Never %	At Least Twice/Week %	Ever %	Never %	At Least Twice/Week %
Regular milk	27.45	17.8	27.69	26.8	17.51	27.73
Reduced fat milk	6.84	11.82	7.6	5.83	10.63	5.53
Low fat milk	4.40	5.23	4.18	5.37	4.7	4.66
Regular yogurt	25.03	21.40	25.86	23.55	24.41	23.86
Low fat yogurt	6.78	8.83	6.69	6.23	8.1	4.7
Regular tasty cheese	33.06	35.58	31.30	32.46	38.68	32.08
Low fat cheese	12.17	13.9	13.66	13.84	12.57	14.28
Butter blends	38.33	34.8	40.23	38.09	35.93	38.13
Butter	48.35	53.4	46.9	46.39	55.25	43.76
Ice cream	38.02	40.4	31.11	37.48	43.93	36.23
Cream	47.88	52.15	42.62	46.66	52.27	39.45
Regular soy milk	13.83	17.01	N/A	12.88	17.25	13.79
Reduced fat soy milk	8.59	6.42	N/A	N/A	N/A	N/A

We also asked respondents who judged each product as 'very' or 'fairly' fattening whether they **avoid** the product as a result of perceiving the product as fattening. We then compared the average fat estimates provided by avoiders and non-avoiders.

Once again, these underscore the impact of consumption triggers **unrelated** to fat content for regular milk, regular yogurt, regular cheese, dairy spreads/blends and ice-cream, for which **non-avoiders** provide higher or comparable fat estimates to avoiders. However we note that for butter and cream a sizeable minority (40%) avoid the product because of fat content and the average fat estimates given by **avoiders** are higher than those given by non-avoiders...

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Avoidance Behaviour – January 2004 and April 2004 Samples Combined

	Avoid Product	Don't Avoid Product	Don't Know
Regular milk	37% (24.95)	58% (35.98)	5% N/A
Regular soy milk	29%	63%	8%
Regular yogurt	28% (24.24)	64% (29.52)	8% N/A
Regular cheese	28% (33.95)	63% (36.39)	9% N/A
Low fat cheese	12%	80%	8%
Dairy spreads/blends	25% (40.37)	69% (39.09)	5% N/A
Butter	40% (56.48)	54% (45.28)	6% N/A
Ice cream	32% (38.45)	61% (40.35)	6% N/A
Cream	40% (55.51)	55% (45.90)	5% N/A

Note: Figures in brackets represent average fat estimates
Base: Rated each product as very or fairly fattening

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Benefits of Dairy Foods

Respondents were asked which particular vitamins and minerals are contained in dairy foods. Consistent with the historical findings calcium dominates perceptions. Awareness of protein and Vitamins A and B has waned relative to the 2004 survey benchmark...

Which Particular Vitamins, Minerals or Nutrients are Contained in Dairy Foods?

	Feb 01	Jun 01	Jun 02	Feb 03	Apr 03	Jun 03	Jan 04	Apr 04
Calcium	85%	89%	85%	90%	94%	84%	91%	89%
Protein	0%	5%	5%	26%	34%	33%	30%	24%
B Vitamins	23%	24%	21%	23%	21%	26%	29%	24%
Vitamin A	26%	32%	29%	22%	22%	29%	33%	23%
Potassium	7%	15%	12%	18%	15%	12%	15%	11%
Riboflavin	2%	5%	7%	11%	10%	11%	12%	9%
Magnesium	3%	9%	6%	10%	11%	8%	9%	10%
Zinc	2%	11%	8%	9%	11%	5%	6%	8%
Phosphorus	1%	5%	4%	7%	8%	2%	4%	5%
Vitamin C	0%	3%	3%	6%	1%	3%	3%	2%
Iron	0%	8%	12%	6%	2%	6%	4%	6%
Vitamin D	0%	3%	5%	3%	1%	5%	6%	4%
Can't say	9%	9%	10%	8%	5%	11%	5%	8%

Q. Which particular vitamins or minerals are contained in dairy foods?

Respondents were also asked to identify the health benefits that **adults** could derive from dairy.

2004 Food of Life Post Campaign Tracking Research Wave 2

The current results reflect more favourable perceptions for growth and development though reduced playback of 'general health and well being', 'energy' and 'immune system' benefits.

Benefits of Dairy for Adults

	Feb 01	Jun 01	Jun 02	Feb 03	Apr 03	Jun 03	Jan 04	Apr 04
Strong teeth/bones	81%	81%	88%	80%	81%	75%	80%	80%
Prevents osteoporosis	48%	58%	56%	61%	59%	53%	60%	56%
General health and well being	0%	24%	21%	32%	43%	34%	38%	25%
Growth and development	11%	10%	13%	22%	24%	14%	14%	19%
Provides energy	0%	11%	12%	19%	23%	23%	24%	19%
Healthy immune system	5%	9%	7%	14%	11%	7%	16%	10%
Provides healthy skin	6%	10%	12%	13%	17%	17%	12%	12%
Provides healthy eyes	2%	5%	5%	8%	7%	9%	5%	7%
Healthy hair	0%	2%	0%	7%	9%	8%	6%	6%
Helps learning	1%	4%	3%	4%	7%	3%	7%	3%
Can't say	6%	2%	2%	7%	2%	3%	2%	2%

Q. What would you say are the main health benefits provided by the various vitamins, minerals and nutrients in dairy foods as far as adults are concerned?

Amongst **children** the major benefits continue to be strong teeth/bones and growth and development – though we note the April 2004 result on the latter remains below the June 2003 post campaign result. We note a sizeable downturn in the number of mentions associated with 'general health and well being' and to a lesser extent for 'energy', 'immune system' and 'healthy skin' benefits...

Benefits of Dairy for Children

	Feb 01	Jun 01	Jun 02	Feb 03	Apr 03	Jun 03	Jan 04	Apr 04
Strong teeth/bones	91%	94%	97%	94%	98%	95%	97%	92%
Growth and development	47%	52%	44%	60%	61%	57%	46%	46%
General health and well being	0%	31%	28%	42%	46%	39%	45%	27%
Prevents osteoporosis	20%	24%	22%	29%	24%	17%	26%	23%
Provides energy	0%	17%	18%	29%	27%	31%	29%	24%
Healthy immune system	12%	14%	12%	24%	24%	17%	20%	14%
Provides healthy skin	10%	12%	12%	18%	17%	17%	19%	10%
Helps learning	6%	8%	9%	13%	16%	12%	15%	11%
Provides healthy eyes	4%	9%	7%	11%	9%	12%	10%	8%
Healthy hair	0%	2%	1%	9%	8%	10%	6%	8%
Can't say	4%	1%	1%	4%	1%	3%	1%	2%

Q. What would you say are the main health benefits provided by the various vitamins, minerals and nutrients in dairy foods as far as younger children are concerned?

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Respondents were also asked to indicate their level of conviction about the benefits of dairy foods on a definitely know it's true – know it's false scale. Results reflect greater conviction associated with 'helps strengthen the bones of adults' and 'gives children energy' though a downturn for the 'growth and development for young children' benefit. We also note a further, albeit modest, decline for 'strong teeth and bones in young children' with the current result being the lowest to date...

Prompted Benefits – Trends in 'Definitely know its true'

	Feb 01	Jun 01	Jun 02	Feb 03	Apr 03	Jun 03	Jan 04	Apr 04
Dairy foods help develop strong teeth and bones in young children	89%	93%	89%	89%	91%	95%	87%	84%
Dairy foods help strengthen the bones of adults	78%	87%	79%	80%	77%	90%	71%	80%
Dairy foods help the growth and development of young children	84%	88%	75%	75%	75%	69%	78%	73%
Dairy foods give adults energy	39%	52%	36%	35%	30%	47%	33%	35%
Dairy foods help to develop the immune system in young children	31%	39%	27%	27%	32%	45%	29%	27%
Dairy foods help young children when it comes to concentration and learning	18%	43%	23%	23%	27%	41%	38%	35%
Dairy foods help the adults' immune system	18%	26%	17%	22%	18%	28%	22%	21%
Dairy foods help give adults healthy skin and eyes	17%	35%	22%	20%	19%	28%	24%	26%
Dairy foods help give adults healthy hair	N/A	N/A	N/A	13%	10%	20%	15%	18%
Dairy foods improve people's hearing	5%	7%	3%	3%	5%	3%	6%	3%
Calcium in dairy foods is better absorbed by the body than calcium from other food or drink sources	N/A	N/A	N/A	N/A	N/A	N/A	26%	28%
Dairy foods give children energy	N/A	N/A	N/A	N/A	N/A	N/A	43%	48%

The Positioning of Dairy Relative to Other Food Groups

All women were asked to rate the extent to which they felt...

- Red meat
- Dairy products
- Fruit and vegetables
- Soy products

...were **essential for a healthy lifestyle for women like themselves**. Whilst dairy food continues to be less well regarded than fruit and vegetables it is considered as significantly more essential than red meat and soy. Dairy's standing has improved modestly from the January 2004 low...

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Rating of Essentiality for a 'Healthy Lifestyle for Women Like You'

April 2004

	Essential	Extremely or very important	Quite or a little important	Not important	Don't know
Red Meat	33%	45%	18%	5%	-
Dairy products	49%	40%	9%	3%	-
Fruit and vegetables	67%	31%	3%	1%	-
Soy products	6%	9%	26%	46%	15%

Trends - Rate as Essential

	Feb 01	Jun 01	Jun 02	Feb 03	Apr 03	Jun 03	Jan 04	Apr 04
Red Meat	43%	32%	38%	41%	← 34%	33%	30%	33%
Dairy products	56%	52%	55%	55%	← 46%	→ 57%	→ 46%	→ 49%
Fruit and vegetables	68%	68%	65%	→ 79%	← 69%	72%	68%	67%
Soy products	7%	9%	7%	8%	8%	6%	7%	6%

In terms of **essentiality for the growth and development of children**, fruit and vegetables continues to lead the field with 80% rating as essential. The comparable figure for dairy is 66% in line with the January 2004 benchmark, though still below the June 2003 peak...

Rating of Essentiality for a the 'Growth and Development of Children'

April 2004

	Essential	Extremely or very important	Quite or a little important	Not important	Don't know
Red Meat	42%	47%	11%	2%	1%
Dairy products	66%	30%	3%	2%	1%
Fruit and vegetables	77%	22%	1%	-	1%
Soy products	6%	10%	21%	45%	20%

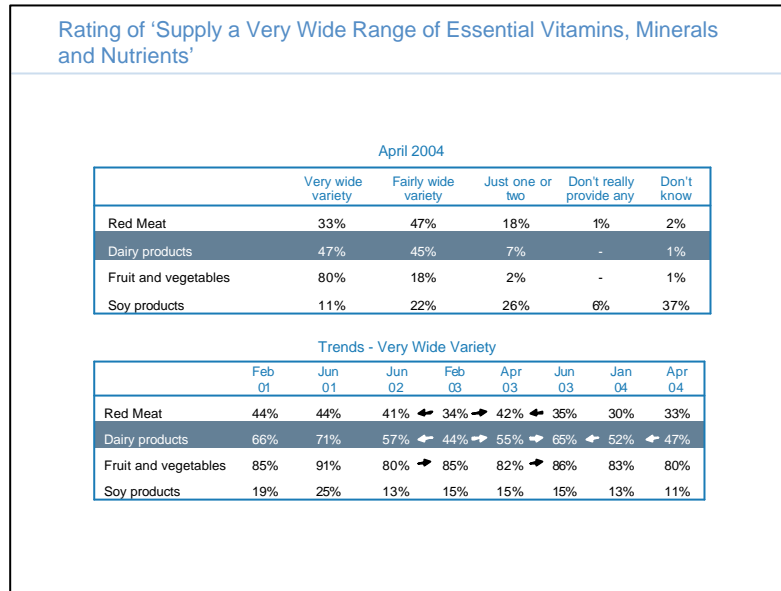
Trends - Rate as Essential

	Feb 01	Jun 01	Jun 02	Feb 03	Apr 03	Jun 03	Jan 04	Apr 04
Red Meat	57%	43%	49%	46%	← 40%	→ 45%	42%	42%
Dairy products	77%	69%	72%	72%	← 67%	→ 75%	← 67%	66%
Fruit and vegetables	79%	75%	79%	→ 84%	← 76%	→ 80%	80%	77%
Soy products	10%	16%	9%	7%	11%	11%	10%	6%

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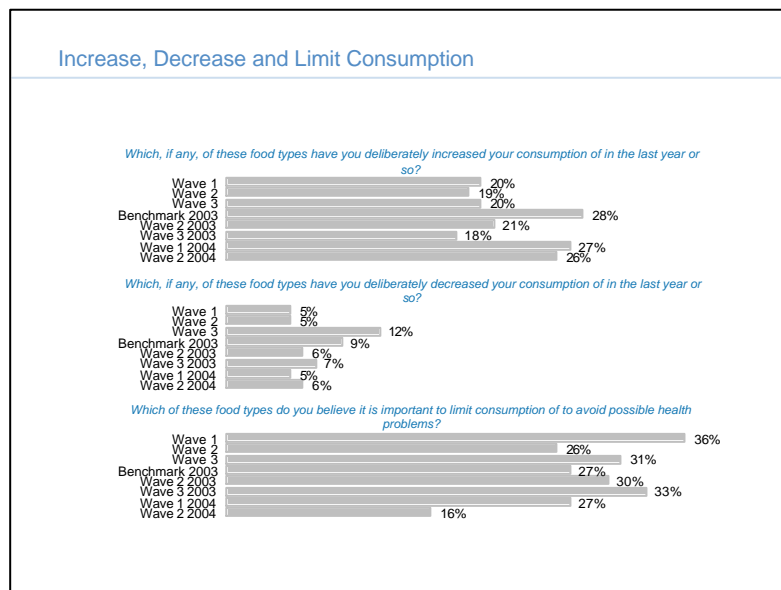
When we examine the four food groups on the dimension of 'containing a wide variety of essential vitamins' we note a further downward shift for dairy – with the current result falling at February 2003 levels...



Respondents were also asked which, if any of the food types, they...

- Have **increased** consumption of in the last year
- Have **decreased** consumption of in the last year
- Believe it is important to **limit** consumption of in the last year.

Trends for **dairy** on each measure are shown below...



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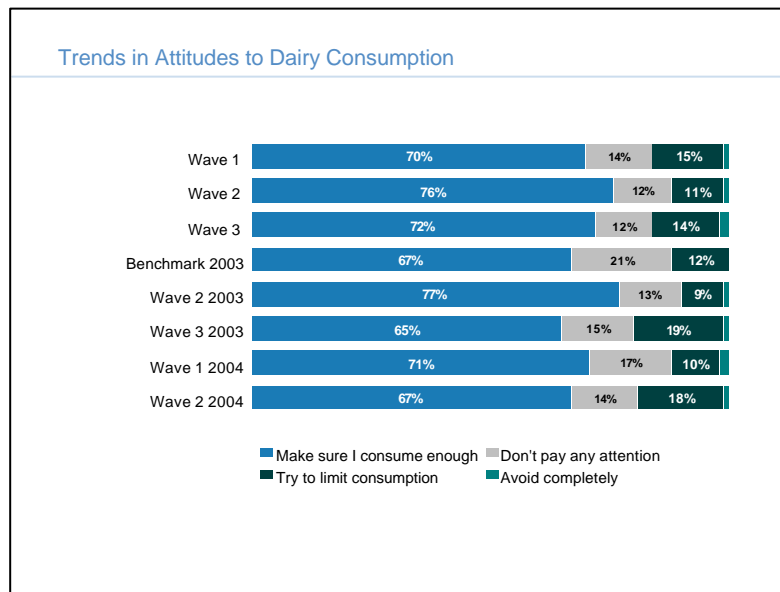
Some 26% have increased dairy consumption – in line with the January 2004 benchmark and above the Wave 3 June 2003 low. Six percent have decreased consumption and results continue to fall below the June 2002 peak of 12%. A further decline in the incidence of limiting dairy is apparent with the current result representing the most favourable to date

Personal Consumption

Respondents were asked to indicate the extent to which they try to limit or consume and adequate amount of dairy foods. In the current wave 10% 'avoid dairy food completely' while 18% 'try to limit' their consumption. While 14% do not pay any real attention to dairy food consumption, 67% selected the statement...

"I try to make sure I consume enough dairy foods"

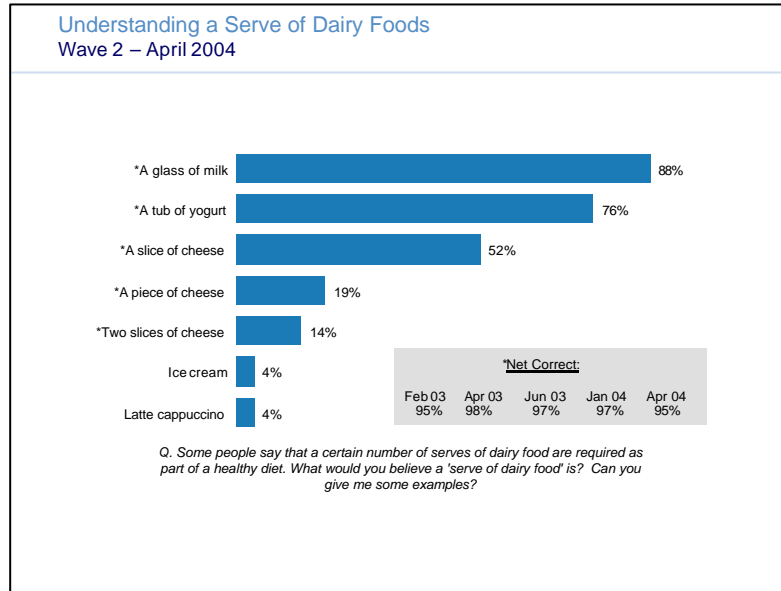
Results reflect a deterioration in the top box rating and an increase in the incidence of avoiding/limiting relative to the January 2004 benchmark...



Sweeney Research

2004 Food of Life Post Campaign Tracking Research Wave 2

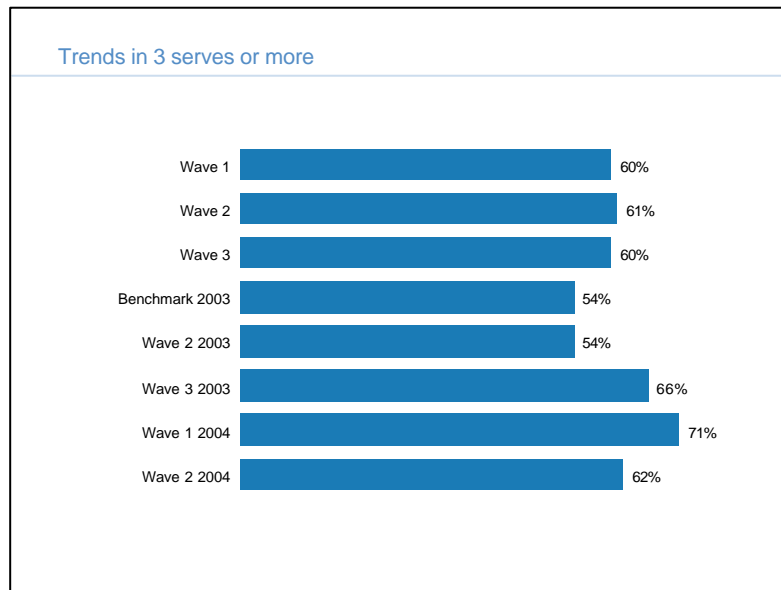
Respondents were also asked to define what constitutes 'a serve of dairy'; 95% correctly nominated at least one portion type, without prompting, in line with the historical results...



Respondents were asked...

“How many serves of dairy food per day do you believe is a healthy target for adults like you?”

Fifty-three percent nominated three serves – with 9% suggesting more than this amount. The 62% 'three or more' figure represents a decline on the January 2004 peak...



Sweeney Research

2004 Food of Life Post Campaign Tracking Research Wave 2

We went on to ask whether or not they made any effort to achieve the target they nominated. The chart below summarises responses in relation to the number of serves nominated and reflects a deterioration on the 2004 benchmark in terms of the proportion of consumers who make **at least some effort to consume three or more serves...**

Perceptions and Behaviour with Respect to Number of Serves Trends

Perceptions of a Healthy Target	Effort Made to Consume This Amount	Feb 01	Jun 01	Jun 02	Feb 03	Apr 03	Jun 03	Jan 04	Apr 04
Three or more serves	A determined effort	13%	23%	20%	19%	19%	20%	23%	16%
	Some effort	31%	29%	27%	23%	28%	30%	35%	30%
	No real effort	15%	9%	12%	12%	7%	16%	14%	17%
Less than three serves	A determined effort	11%	11%	10%	10%	18%	10%	10%	10%
	Some effort	18%	15%	20%	17%	12%	17%	10%	16%
	No real effort	7%	11%	7%	14%	13%	8%	7%	11%
Don't know	4%	2%	2%	4%	3%	-	1%	1%	
None	1%	1%	-	2%	1%	-	2%	2%	
% at least some effort to consume 3 or more serves		44%	52%	47%	42%	47%	50%	58%	46%

The ease of reaching a healthy serve target was also canvassed amongst respondents. As shown below, the current results reflect a modest downturn on the January 2004 peak...

Difficulty in Achieving Target for Adults

	Feb 03	Apr 03	Jun 03	Jan 04	Apr 04
Not difficult at all	72%	68%	71%	76%	70%
It requires a bit of an effort	25%	26%	26%	21%	24%
Reasonably difficult	3%	4%	3%	3%	6%
It's very difficult	0%	1%	1%	-	1%

Q. Which of these statements best describes how difficult it is to reach the total of these serves?

Sweeney Research

2004 Food of Life Post Campaign Tracking Research Wave 2

Behaviour with Respect to Children

Mothers were asked to indicate the extent to which they try to limit or encourage consumption of dairy foods amongst their children aged under 13. Four percent indicated that they avoided dairy foods completely, an improvement on the January 2004 figure of 13%, though we note an increase in the proportion who restrict or don't pay any attention to consumption. Eighty-two percent try to ensure their children consume enough dairy, a modest improvement on the 2004 benchmark, though well below the 2003 post campaign levels ...

Overall Attitude to Children's Dairy Consumption

Thinking about your children under 13, do you...	Feb 01	Jun 01	Jun 02	Feb 03	Apr 03	Jun 03	Jan 04	Apr 04
Ensure that they avoid dairy foods completely	1%	2%	2%	6%	2%	4%	13%	4%
Try to restrict their consumption	2%	3%	3%	7%	2%	1%	2%	6%
Don't really pay any attention to their consumption	2%	3%	3%	6%	1%	3%	4%	5%
Try to make sure they consume enough	93%	92%	92%	80%	94%	91%	78%	82%
Don't know	3%	1%	0%	1%	1%	1%	3%	3%

The proportion nominating three serves or more as a healthy target for children, 80% is in line with the January 2004 benchmark and somewhat below the 2003 post campaign results...

Perceptions of Number of Serves Required for Children

	Feb 01	Jun 01	Jun 02	Feb 03	Apr 03	Jun 03	Jan 04	Apr 04
None	1%	1%	0%	1%	0%	0%	13%	5%
One	3%	1%	1%	4%	3%	1%	3%	6%
Two	12%	7%	11%	14%	11%	7%	5%	8%
Three	41%	46%	65%	54%	60%	54%	47%	56%
Four or more	40%	43%	21%	25%	25%	38%	31%	24%
Don't know	2%	5%	2%	3%	1%	-	1%	1%
% Three or more	81%	89%	86%	79%	85%	92%	78%	80%

Q. How many serves of dairy food per day do you believe is a healthy target for children under 13?

Sweeney Research

2004 Food of Life Post Campaign Tracking Research Wave 2

We also asked the extent to which adults try to ensure their children achieve the number of serves nominated. The current result is in line with the January 2004 low and well under the 2003 post campaign results...

Perceptions and Behaviour with Respect to Number of Serves for Children Trends

Perceptions of a Healthy Target	Effort Made to Consume This Amount	Feb 01	Jun 01	Jun 02	Feb 03	Apr 03	Jun 03	Jan 04	Apr 04
Three or more serves	A determined effort	44%	57%	53%	39%	57%	54%	47%	44%
	Some effort	34%	26%	28%	29%	24%	28%	22%	27%
	No real effort	5%	6%	5%	9%	3%	10%	8%	6%
Less than three serves	A determined effort	6%	5%	4%	6%	7%	6%	5%	6%
	Some effort	9%	3%	7%	9%	5%	1%	2%	5%
	No real effort	*	1%	1%	3%	2%	1%	2%	3%
Don't know	2%	5%	2%	3%	1%	-	1%	3%	
None	1%	1%	0%	1%	0%	0%	13%	5%	
% at least some effort to consume 3 plus serves		78%	83%	81%	68%	81%	82%	69%	71%

The ease of reaching a healthy target for children has dropped marginally relative to June 2003 and January 2004 peaks – though remains above the February and April 2003 results...

Difficulty in Achieving Target for Children

	Feb 03	Apr 03	Jun 03	Jan 04	Apr 04
Not difficult at all	66%	70%	83%	83%	78%
It requires a bit of an effort	29%	26%	15%	14%	15%
Reasonably difficult	3%	2%	2%	3%	5%
It's very difficult	2%	1%	-	1%	2%

Q. Which of these statements best describes how difficult it is to reach the total of these serves for your children under 13?

Sweeney Research

2004 Food of Life Post Campaign Tracking Research Wave 2

Background

This document discusses the findings of a benchmark study undertaken prior to the launch of the 2004 Dairy Food of Life tracking study. The purpose of the research is to establish baseline attitudinal, perceptual and advertising recall measures against which the efficacy of the campaign will be assessed.

The research follows on from the studies conducted in...

- February 2001
- June 2001
- June 2002
- February 2003
- April 2003
- June 2003
- January 2004.

The key objectives of the research programme are to...

- Track the positioning of dairy in the context of other key food groups
- Track attitudes towards dairy foods
- Track understanding of which vitamins and minerals are contained in dairy foods
- Track understanding of the key benefits of dairy foods
- Track awareness of and behaviour with respect to '3 serves'
- Measure and track recall and recognition of the 'Food of Life' campaign
- Look at overall attitudes towards health and nutrition.

2004 Food of Life Post Campaign Tracking Research Wave 2

Research Approach

Replicating the methodology of the previous three waves, the study consisted of a door to door interview conducted amongst 200 mothers aged 18-39 – 100 in each of Sydney and Melbourne.

Broad age quotas were set such that around one-third fell into each of the 18-29, 30-34 and 35-39 categories. Fieldwork was conducted over the period April 26th to April 30th 2004, following the first flight of advertising which concluded on April 25th 2004.

Copies of the questionnaire and prompt materials are contained in Appendix 1.

Appendix 2 contains details of the sample composition.

THE FINDINGS IN DETAIL

SECTION 1: Advertising/Promotional Initiatives

Unaided Recall of Food of Life Slogan

	April 2004	
	Unaided (200)	Total (200)
Three serves a day	20%	N/A
Dairy Good	12%	N/A
Food of Life	10%	49%
None/don't know	57%	57%

Q. What particular advertising slogan or sign-off line, if any, do you associate with dairy foods in general? I'm not talking about advertising for particular brands of milk, butter or cheese but advertising for dairy foods in general.

Q. The slogan is "Dairy - the Food of Life". Can you recall seeing or hearing this line?

Base = Total sample

Trends on Recall of Food of Life Slogan

Unaided



Aided



2004 Food of Life Post Campaign Tracking Research Wave 2

Recall of Food of Life Slogan

Spontaneous (unaided) awareness of the 'Food of Life' slogan falls at 10% - in line with Dairy Good and somewhat below 3 Serves.

After prompting, recognition of 'Food of Life' rose substantially to 49%.

Some six in ten were unable to associate any advertising slogan with dairy foods.

Trends since January 2004 on both unaided and aided measures reveal no appreciable shifts.

Effectiveness of Food of Life Slogan

	January 2004 Total	April 2004 Total
Very good	48%	27%
Good	42%	48%
Fair	6%	22%
Poor	4%	1%
Very poor	-	2%
Total very good/good	90%	75%

Q. Do you think that "Dairy - the Food of Life" is a very good, good, fair, poor or very poor way of describing dairy food?

Base = Aware of Food of Life slogan (n=102/97)

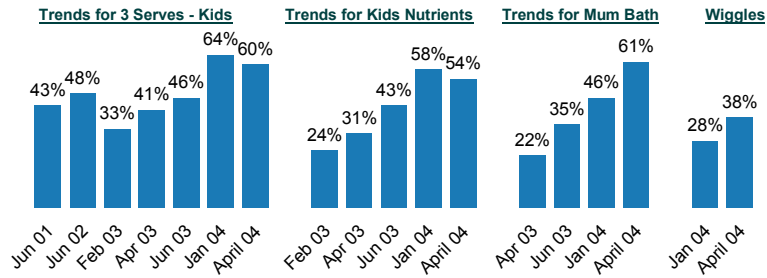
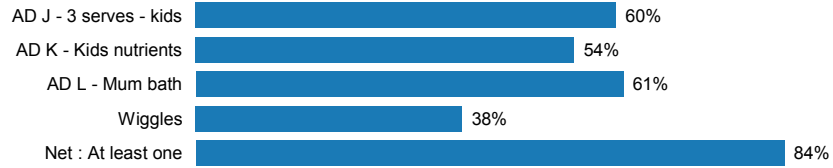
Effectiveness of Food of Life Slogan

Seventy-five percent perceive the slogan to be an effective way of describing dairy foods.

Results show a downward trend on the top box 'very good' measure.

Prompted Recognition of TV Advertising

April 2004



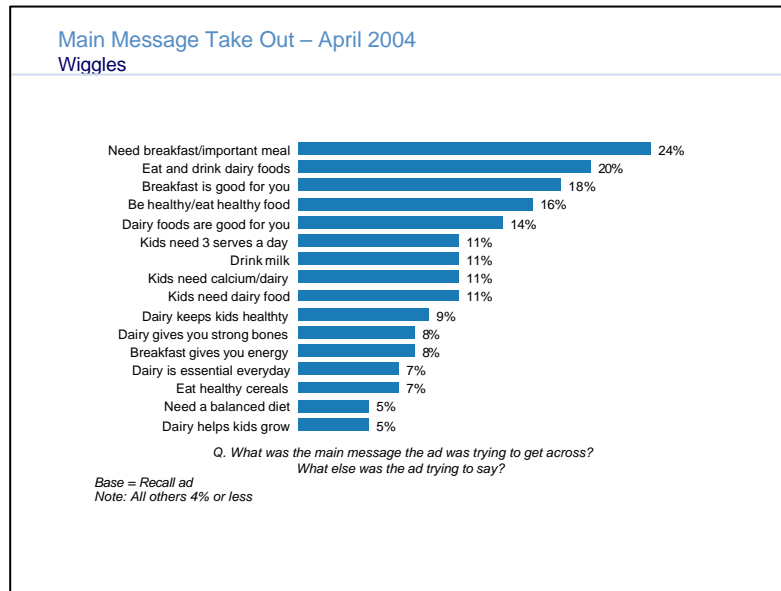
2004 Food of Life Post Campaign Tracking Research Wave 2

Prompted Recognition of TV Advertising

Respondents were shown stills from the four executions detailed opposite.

Sixty percent recalled the 3 Serves execution; 54% Kids Nutrients, 61% Mum Bath and 38% the Wiggles ad. In total 84% recalled at least one of the four executions. Trends reveal sizeable gains for Mum Bath and the Wiggles, while 3 Serves and Kids Nutrients have held firm at the buoyant January 2004 levels.

Main message take outs for the Wiggles were...



Sponsorship awareness of the Wiggles ad shows strong 'ownership' by dairy...

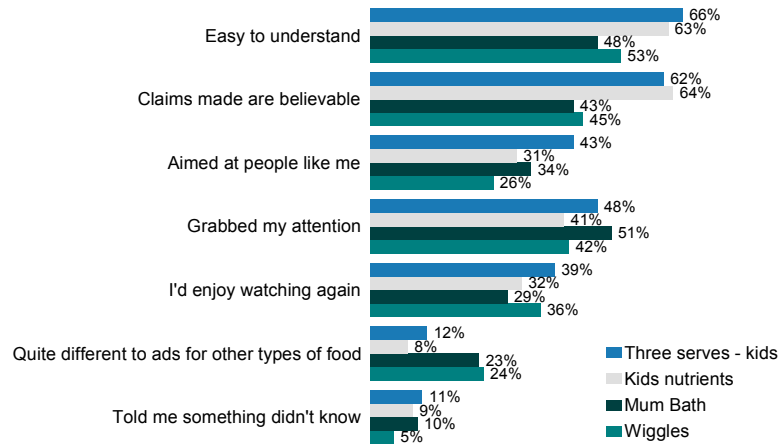
Sponsorship Awareness of Wiggles CSA

	January 2004	April 2004
Meat/fish/poultry	-	9%
Dairy products	84%	75%
Fruit and vegetables	9%	11%
Breads/cereals/rice/pasta	29%	38%
None/don't know	6%	9%

Base = Recall ad (n=56/76)

Sweeney Research

Words and Phrases which Apply to the TV Ads
 April 2004



Base = Recall ad

Q. Which of these words or phrases do you think apply to this ad - you may say as many or as few of them as you like.

2004 Food of Life Post Campaign Tracking Research Wave 2

Words and Phrases Which Apply to the TV Ads

Those recognising each ad were asked to nominate which of seven words or phrases shown opposite applied to it.

To take each in turn.

Easy to Understand

3 Serves and Kids Nutrients take the lead on this measure.

Claims Made are Believable

3 Serves and Kids Nutrients also lead here.

Aimed at People Like Me

3 Serves dominates while Wiggles is least associated with this attribute.

Attention Grabbing

While all executions perform fairly well on this measure, 3 Serves and Mum Bath edge ahead of the other executions.

An Ad I'd Enjoy Watching Again

Differences between the executions are not pronounced though 3 Serves and Wiggles edge just ahead of the other executions.

Quite Different to Ads for Other Types of Food

Mum Bath and Wiggles tend to be perceived as more distinctive.

Told Me Something I Didn't Know

None of the executions have a strong profile in this regard.

Words and Phrases which Apply to the TV Ads - Trends

	Three Serves					Nutrients					Mum Bath				Wiggles	
	2003			2004		2003			2004		2003		2004		2004	
	W1 %	W2 %	W3 %	W1 %	W2 %	W1 %	W2 %	W3 %	W1 %	W2 %	W2 %	W3 %	W1 %	W2 %	W1 %	W2 %
It is easy to understand	56	→ 68	← 87	← 67	66	60	59	→ 76	← 56	→ 63	63	→ 72	← 39	→ 48	46	→ 53
The claims made in the ad are believable	71	68	→ 78	← 59	62	66	62	67	← 51	→ 64	53	55	← 37	→ 43	45	45
It is aimed at people like me	24	→ 35	→ 47	45	43	40	31	33	34	31	33	→ 46	← 35	34	25	26
It was an ad that grabbed my attention	36	→ 22	→ 52	← 46	48	30	15	→ 36	→ 41	41	40	→ 55	← 50	51	57	← 42
It was an ad I'd enjoy watching again	24	← 17	→ 37	→ 42	39	23	21	21	→ 35	32	12	→ 30	28	29	36	36
Quite different to ads from other types of food	9	5	13	9	12	11	5	12	9	8	16	20	22	23	30	← 24
Told me something I didn't know	6	6	5	2	→ 11	6	10	13	8	9	5	10	11	10	5	5

2004 Food of Life Post Campaign Tracking Research Wave 2

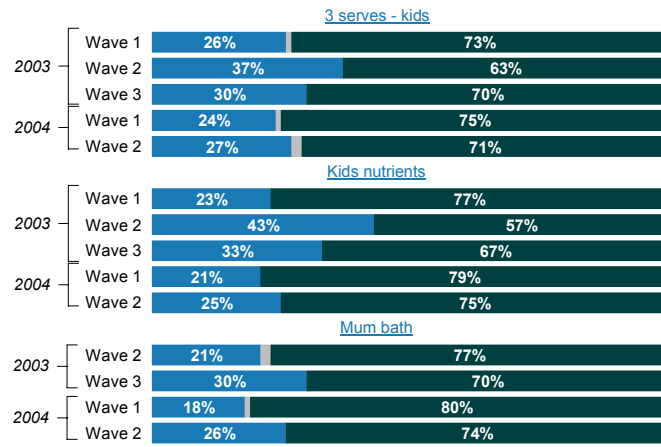
Trends on these communication attributes for the executions are shown opposite.

For 3 Serves we note an improvement on 'told me something I didn't know' relative to the January 2004 benchmark, albeit from a very low level.

For Kids Nutrients and Mum Bath we observe gains for 'easy to understand' and 'claims made are believable' relative to the January 2004 benchmark.

For Wiggles we note more favourable perceptions for 'easy to understand' though a decline on the 'attention grabbing' and uniqueness ('different to ads for other types of food') values.

Impact of the Ads on Personal Consumption



Q. Do you think this ad makes you personally more likely to...

Base = Recall ad

■ Consume more ■ Consume less ■ No real difference

2004 Food of Life Post Campaign Tracking Research Wave 2

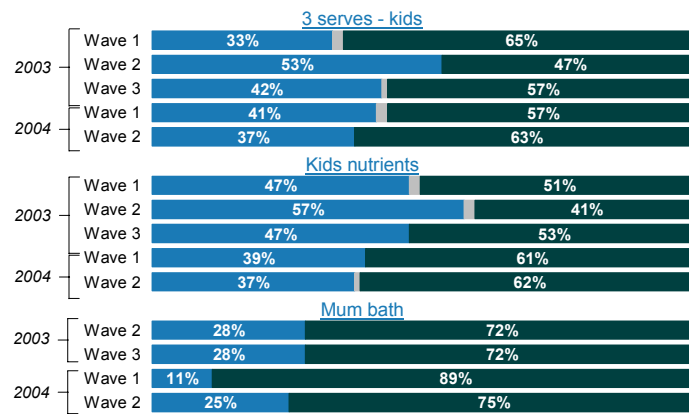
Impact of the TV Ads on Personal Consumption

In the current wave 27% indicated that 3 Serves would predispose them to **increase their personal consumption** – marginally up on the January 2004 low.

For Kids Nutrients the current result is 25% - a modest improvement on the January 2004 low – though below the 2003 post campaign results.

For Mum Bath the current result of 26% represents an improvement on the January 2004 low and is approaching the 2003 Wave 3 peak of 30%.

Impact of the TV Ads on Child's Consumption



Q. And how does this ad effect your view towards your children's consumption of dairy foods - will you try to make them.....

Base = Recall ad

■ Consume more ■ Consume less ■ No real difference

Impact of the TV Ads on Child's Consumption

In the current wave 37% indicated that 3 Serves would encourage them to provide more dairy for their **children** – a modest decline on the January 2004 benchmark.

Kids Nutrients motivated 37% of mothers to provide more dairy – in line with the January 2004 result, though significantly below the historical results.

Twenty-five percent indicated that Mum Bath would have a favourable impact on their children's dairy consumption – a sizeable improvement on the benchmark result and consistent with the 2003 post campaign levels.

Fresh: Awareness and Sponsorship

	January 2004 (200)	April 2004 (200)
Watched Fresh Program:		
Yes	46%	39%
No	54%	61%
(If Aware)	(92%)	(77%)
Sponsor:		
Meat/fish/poultry/eggs	38%	29%
Dairy products	41%	42%
Fruit and vegetables	36%	29%
Breads/cereals/rice/pasta	24%	14%
None/don't know	40%	48%

*Q. Have you ever watched the TV program called 'Fresh' on Channel 9?
Q. Which, if any, of these types of foods sponsor the Fresh program?*

Fresh: Awareness and Sponsorship

Some 39% recalled the TV program – down from 46% in the benchmark.

Dairy leads the field of sponsors with awareness of all other entrants declining since January 2004.

Prompted Recognition of 3 Serves Logo

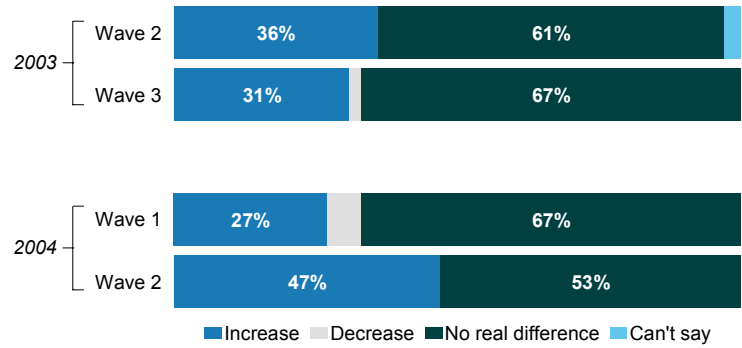
	Wave 2 2003	Wave 3 2003	Wave 1 2004	Wave 2 2004
<i>Have you seen this symbol before today?</i>				
Yes	18%	→ 26%	26%	23%
No	82%	74%	74%	77%

Prompted Recognition of 3 Serves Logo

Results are in line with those of the previous two quarters and as such represent a modest improvement on the Wave 2 2003 results.

Sweeney Research

3 Serves Logo: Impact on Consumption



Base = Recall symbol

3 Serves: Impact on Consumption

Forty-seven percent indicated the logo would predispose them towards **increased** dairy consumption – a new high.

Prompted Recognition of Grand Dairy Awards Logo

	Wave 1 2004 (200)	Wave 2 2004 (200)
<i>Have you seen this logo on dairy foods before?</i>		
Yes	9%	6%
No	91%	94%

Q. Have you seen this logo on dairy foods before?

Prompted Recognition of the Grand Dairy Awards

Just 6% recalled seeing the logo on dairy foods – in line with the January 2004 results.

Sweeney Research

Message Take Out of Grand Dairy Awards Logo

	Main Message	Total Message
Australian made/owned	17%	58%
Premium quality	17%	33%
Good for you	17%	17%
Won a prize	17%	50%
Farm fresh	-	33%
Good for your heart	8%	17%
Don't know	8%	8%

Q. If you see this symbol on a dairy product what would it mean to you?

Base = Recall logo (n=12)

Message Take Out of Grand Dairy Awards Logo

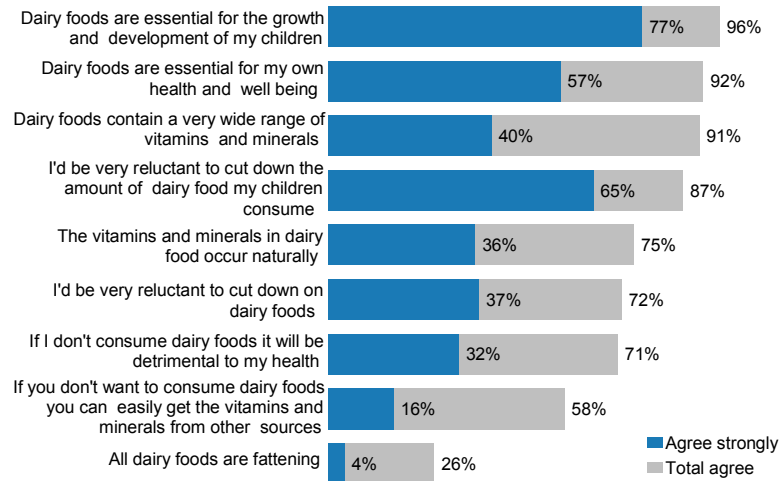
Amongst the small minority who recognised the Logo, the main message take outs were...

- Australian made
- Won a prize
- Premium quality
- Farm fresh.

SECTION 2: Attitudes Towards Dairy Foods

General Attitudes towards Dairy Foods

Summary – Wave 2 2004



2004 Food of Life Post Campaign Tracking Research Wave 2

Summary of General Attitudes – Wave 2 2004

All respondents were asked the extent to which they agreed or disagreed with nine statements about dairy foods.

The table opposite ranks the statements in order of the level of agreement.

All illustrated, the statement generating the highest level of agreement – 96% agree and 77% agree strongly is...

“Dairy foods are essential for the growth and development of my children”

A very high proportion, around nine in ten, agree with...

“Dairy foods are essential for my own health and well being”

“Dairy foods contain a very wide range of vitamins and minerals.”

“I’d be very reluctant to cut down on the amount of dairy food my children consume”

Between seven in ten and three-quarters agree that...

“The vitamins and minerals in dairy food occur naturally”

“That they would be very reluctant to cut down on dairy foods”

“If I don’t consume enough dairy it will be detrimental to my health”

And close to six in ten that...

“If you don’t want to consume dairy foods you can easily get the vitamins and minerals from other sources”

One-quarter agree that **all** dairy foods are fattening – though just 4% strongly embrace this view.

Attitudes towards Dairy Foods
Trends

	Agree Strongly					Total Agree				
	2003			2004		2003			2004	
	W1 %	W2 %	W3 %	W1 %	W2 %	W1 %	W2 %	W3 %	W1 %	W2 %
Dairy foods are essential for the growth and development of my children	75	78	80	80	77	97	96	99	97	96
Dairy foods are essential for my own health and well being	56	60	58	59	57	92	95	93	97	92
Dairy foods contain a very wide range of vitamins and minerals	43 →	49 →	54 ←	44 ←	40	88 →	94	94	91	91
I'd be very reluctant to cut down the amount of dairy food my children consume	65	67 →	77	73 ←	65	92	92	95	92 ←	87
The vitamins and minerals in dairy food occur naturally	37 →	41	40	42 ←	36	83 →	88	85	88 ←	75
I'd be very reluctant to cut down on dairy foods	37 →	39 →	41 →	47 ←	37	76 →	78	78 →	83 ←	72
If I don't consume dairy foods it will be detrimental to my health	27 →	30 →	33 →	37 ←	32	61 →	74 ←	62 →	79 ←	71
If you don't want to consume dairy foods you can easily get the vitamins and minerals from other sources	16	14	17	18	16	58	55 ←	46 →	60	58
All dairy foods are fattening	N/A	N/A	4	9	4	N/A	N/A	20 →	34 ←	26

Attitudes to Dairy Foods: 2003 vs. 2004 Trends

The most noteworthy shifts are...

- A further modest decline in the proportion who agree strongly that 'dairy foods contain a very wide range of vitamins and minerals'. The current result represents a new low
- Less resistance to curtailing children's and personal dairy consumption coupled with reduced sensitivity to detrimental health consequences from insufficient dairy consumption
- Less favourable perceptions concerning the naturalness of dairy.

On a more positive note, consumers are less likely to perceive **all** dairy foods as fattening.

Attitudes towards Dairy Foods

Percentage who agree – longer term trends

	2001		2002	2003			2004	
	Feb %	Jun %	Jun %	Feb %	Apr %	Jun %	Jan %	Apr %
Dairy foods contain a very wide range of vitamins and minerals	90	95	90	88 →	94	94	91	91
The vitamins and minerals in dairy foods occur naturally	79	91	76 →	83 →	88	85	88 ←	75
Dairy foods are essential for my own health and well being	91	96	92	92	95	93	97	92
If you don't want to consume dairy foods you can easily get the vitamins and minerals they contain from other sources	67 ←	59	58	58	55 ←	46 →	60	58
I'd be very reluctant to cut down on dairy foods	77	78	68 →	76	78	78	83 ←	72
If I don't consume dairy foods it will be detrimental to my health	N/A	76	73 ←	61 →	74 ←	62 →	79 ←	71
Dairy foods are essential for the growth and development of my children	97	98	96	97	96	99	97	96
I'd be very reluctant to cut down the amount of dairy food my children consume	89	93	88	92	92	95	92 ←	87
All dairy foods are fattening	N/A	N/A	N/A	N/A	N/A	20	34 ←	26

Attitudes to Dairy Foods: Longer Term Trends

The table opposite examines longer term attitudinal trends.

The universal view that 'dairy foods are essential for the growth and development of children' has been unassailable throughout the course of the research.

At a slightly lower level we note a similar pattern of results for the 'wide range of vitamins' and 'essentiality for personal health and well being'.

The current results for 'naturalness' and 'reluctance to cut down' on personal and children's consumption are lower than historical levels.

Current results for the substitutability of dairy are in line with those of January 2004 – though they are less favourable than those for June 2003, when agreement levels were at their lowest.

SECTION 3: Dairy Favourability Indices

The Adult Dairy Favourability Index

Adult Dairy Favourability Index								
	2001/2002			2003			2004	
	W1	W2	W3	W1	W2	W3	W1	W2
Highly favourably (8 to 14)	25%	36%	30%	31%	36%	33%	31%	29%
Moderately favourable (1 to 7)	64%	56%	57%	56%	56%	57%	61%	56%
Unfavourable (-14 to 0)	11%	8%	14%	13%	8%	10%	8%	15%
Average Index Score	4.85	6.03	5.04	5.08	5.93	5.97	5.82	4.64

2004 Food of Life Post Campaign Tracking Research Wave 2

The Dairy Favourability Indices

In order to provide a single, composite measure of attitudes towards dairy we have developed a Dairy Favourability Index for adults and children. Effectively this calculates a total score for each respondent according to how positive or negative their view is towards dairy foods in terms of personal consumption and their children's consumption.

For the adult dairy favourability index a score is given for four statements relating to the extent to which people agree or disagree. These scores vary by statement, with the higher importance statements (e.g. dairy foods are essential for my own health and wellbeing) given a higher weighting.

For the positive statements agreement generates a positive score and disagreement generates a negative score; for the negative statements agreement generates a negative score and disagreement generates a positive score. The statements and weightings used in the adult dairy favourability index are summarised below...

The Adult Dairy Favourability Index					
The Adult Dairy Favourability Index Scoring Plan					
	Agree Strongly	Agree Somewhat	Neutral	Disagree Somewhat	Disagree Strongly
Dairy foods contain a very wide range of vitamins and minerals	+2	+1	0	-1	-2
Dairy foods are essential for my own health and well being	+4	+2	0	-2	-4
If you don't want to consume dairy foods you can easily get the vitamins and minerals they contain from other sources	-4	-2	0	+2	+4
I'd be very reluctant to cut down on dairy foods	+4	+2	0	-2	-4
Maximum Points Achievable		=	+14		
Minimum Points Achievable		=	-14		

The scores are added to generate a single total for each respondent – the higher the score the more positive they are towards dairy. The maximum value for the adult dairy favourability index is +14. To achieve a score of +14 the respondent would have to agree strongly with the three positive statements and disagree strongly with the negative statement. The minimum value is -14 which would be the case if the respondent disagreed strongly with the three positive statements and agreed strongly with the negative statement.

We can group respondents into 'highly favourable', 'moderately favourable' or unfavourable depending on their score.

The results of this calculation for the Adult Dairy Favourability Index are shown opposite.

We note that the Wave 2 2004 result represents a new low – attributable to the growth in the 'unfavourable segment'.

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The Children's Dairy Favourability Index

Children's Dairy Favourability Index								
	2001/2002			2003			2004	
	W1	W2	W3	W1	W2	W3	W1	W2
Highly favourably (+8 to +14)	42%	53%	43%	46%	52%	53%	43%	42%
Moderately favourable (+1 to +7)	52%	42%	50%	47%	45%	45%	53%	51%
Unfavourable (-14 to 0)	6%	5%	7%	7%	3%	2%	4%	7%
Average Index Score	6.78	7.64	6.93	6.61	→7.35	→7.85	←7.06	←6.40

Base: Children under 13

2004 Food of Life Post Campaign Tracking Research Wave 2

The Children's Dairy Favourability Index statements and weightings are summarised below...

The Children's Dairy Favourability Index

Children's Dairy Favourability Index Scoring Plan					
	Agree Strongly	Agree Somewhat	Neutral	Disagree Somewhat	Disagree Strongly
Dairy foods are essential for the growth and development of my children	+4	+2	0	-2	-4
I'd be very reluctant to cut down on the amount of dairy food my children consume	+4	+2	0	-2	-4
If you don't want to consume dairy foods you can easily get the vitamins and minerals they contain from other sources	-4	-2	0	+2	+4
Dairy foods contain a very wide range of vitamins and minerals	+2	+1	0	-1	-2

Maximum Points Achievable	=	+14
Minimum Points Achievable	-	-14

As is the case for the adult index, a single score is added together for each respondent – the higher the score the more favourable the disposition towards dairy for their children.

As shown opposite the index has fallen to a new low – edging just under the Wave 1 2003 benchmark.

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SECTION 4: Fat Content: Knowledge, Attitudes and Behaviour

2004 Food of Life Post Campaign Tracking Research Wave 2

Fat Content Estimates

The table below examines trends on fat estimates entrants for the three milk variants. Trends reveal a high level of consistency with the Wave 3 results. Once again, we see that the fat content of regular milk is greatly overstated....

Fat Content	Regular Milk			Reduced Fat Milk			Low Fat Milk		
	Wave 3 2003	Wave 1 2004	Wave 2 2004	Wave 3 2003	Wave 1 2004	Wave 2 2004	Wave 3 2003	Wave 1 2004	Wave 2 2004
None	-	-	-	1%	-	2%	3%	3%	5%
1%	-	2%	-	18%	14%	11%	41%	38%	33%
2%	1%	1%	2%	18%	16%	16%	13%	13%	13%
3%	4%	2%	2%	7%	9%	9%	8%	6%	5%
4%	13%	13%	13%	5%	3%	3%	2%	1%	2%
5%	11%	4%	5%	12%	8%	11%	10%	8%	8%
6-9%	6%	8%	7%	5%	7%	6%	1%	2%	2%
10%	14%	14%	10%	6%	10%	8%	4%	11%	6%
11-20%	12%	11%	15%	9%	11%	6%	5%	3%	6%
21-30%	7%	4%	7%	5%	8%	6%	3%	3%	3%
31-40%	3%	7%	6%	2%	2%	3%	1%	-	1%
41-50%	8%	6%	5%	2%	1%	3%	1%	-	-
51% plus	13%	17%	10%	4%	1%	1%	2%	-	1%
Average	25.2%	27.25%	23.25	10.0%	9.71%	10.0%	5.5%	4.29%	5.38%
% Providing correct estimate or lower	4% or less	17%	17%	3% or less	43%	37%	1% or less	44%	38%
Can't say	11%	15%	23%	10%	15%	19%	9%	15%	18%

We suspect that the presence of two lower fat milk variants are heightening perceptions of the fat content of regular milk. While estimates for the low fat milk variants are also overstated we note that these are somewhat more accurate – probably attributable to the more informed health/weight conscious consumers of these products.

Fat content estimates of regular soy milk continues to fall below that of regular milk – though we note that six in ten are unable to state the fat content of either regular or low fat soy variants...

Fat Content	Regular Soy Milk		Reduced Fat Soy Milk	
	Wave 1 2004	Wave 2 2004	Wave 1 2004	Wave 2 2004
None	-	2%	4%	3%
1%	4%	3%	8%	9%
2%	4%	1%	10%	7%
3%	2%	1%	4%	3%
4%	4%	4%	1%	2%
5%	4%	5%	7%	8%
6-9%	3%	4%	2%	1%
10%	10%	8%	10%	6%
11-20%	10%	10%	3%	3%
21-30%	3%	3%	2%	2%
31-40%	3%	1%	1%	1%
41-50%	2%	3%	1%	1%
51% plus	5%	1%	-	-
Average	17.22%	15.26%	6.85%	6.66%
% Providing correct estimate or lower	4% or less	10%	1% or less	12%
Can't say	49%	57%	51%	57%

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2004 Food of Life Post Campaign Tracking Research Wave 2

Fat content estimates for regular and low fat yogurt are shown below.

As for regular milk we note the fat content of regular yogurt is greatly overstated – though we note a marginal decline in the average estimate since Wave 1 2004...

Fat Content	Regular Yogurt			Low Fat Yogurt	
	Wave 3 2003	Wave 1 2004	Wave 2 2004	Wave 1 2004	Wave 2 2004
None	-	1%	1%	1%	3%
1%	1%	1%	1%	20%	15%
2%	-	3%	-	13%	18%
3%	2%	2%	2%	6%	9%
4%	9%	9%	9%	4%	2%
5%	13%	6%	8%	8%	11%
6-9%	6%	6%	8%	3%	5%
10%	14%	11%	12%	14%	7%
11-20%	15%	14%	16%	9%	7%
21-30%	7%	8%	6%	4%	3%
31-40%	3%	8%	4%	2%	1%
41-50%	6%	4%	8%	2%	1%
51% plus	12%	14%	5%	-	1%
Average	23.5%	26.49%	20.7%	8.48%	6.66%
% Providing correct estimate or lower	4% or less 12%	16%	11%	1% less or 21%	18%
Can't say	17%	18%	25%	17%	22%

Fat content estimates for cheeses, butter and blends and cream are shown below and overleaf and reveal no appreciable shifts. In the main they tend to be understated...

Fat Content	Regular Tasty Cheese			Low Fat Cheese		
	Wave 3 2003	Wave 1 2004	Wave 2 2004	Wave 3 2003	Wave 1 2004	Wave 2 2004
None	-	-	-	-	-	1%
1%	-	1%	-	10%	11%	5%
2%	1%	1%	1%	9%	8%	7%
3%	1%	-	1%	4%	6%	4%
4%	1%	1%	1%	2%	3%	2%
5%	5%	3%	4%	13%	11%	11%
6-9%	7%	7%	5%	6%	6%	8%
10%	14%	12%	6%	13%	11%	12%
11-20%	16%	17%	16%	15%	14%	14%
21-30%	14%	9%	14%	5%	11%	13%
31-40%	7%	8%	9%	6%	4%	2%
41-50%	5%	6%	13%	4%	2%	1%
51% plus	20%	23%	14%	3%	1%	1%
Average	32.6%	33.62%	33.53%	13.9%	12.85%	13.06%
% Providing correct estimate or lower	35% or less 60%	55%	47%	25% or less 73%	76%	69%
Can't say	13%	18%	22%	14%	16%	23%

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2004 Food of Life Post Campaign Tracking Research Wave 2

Fat Content Estimates - Butters

Fat Content	Dairy/Butter Blends			Butter		
	Wave 3 2003	Wave 1 2004	Wave 2 2004	Wave 3 2003	Wave 1 2004	Wave 2 2004
None	1%	-	1%	-	-	-
1%	-	2%	1%	-	2%	-
2%	1%	1%	2%	1%	1%	2%
3%	2%	1%	1%	1%	1%	-
4%	3%	2%	1%	-	-	1%
5%	6%	3%	3%	3%	2%	1%
6-9%	6%	5%	3%	5%	4%	4%
10%	10%	7%	5%	7%	6%	2%
11-20%	12%	16%	14%	12%	9%	11%
21-30%	9%	10%	11%	13%	10%	13%
31-40%	7%	7%	9%	6%	4%	10%
41-50%	7%	8%	7%	8%	9%	6%
51% plus	25%	22%	18%	37%	41%	31%
Average	36.5%	38.24%	36.45%	49.1%	52.2%	47.05%
% Providing correct estimate or lower	70% or less 69%	64%	62%	80% or less 67%	67%	68%
Can't say	16%	21%	30%	13%	16%	23%

Fat Content Estimates – Cream

Fat Content	Wave 3 2003	Cream	
	Wave 3 2003	Wave 1 2004	Wave 2 2004
None	-	-	-
1%	-	2%	-
2%	-	1%	1%
3%	-	-	1%
4%	-	-	1%
5%	2%	3%	1%
6-9%	5%	4%	3%
10%	5%	4%	4%
11-20%	13%	10%	11%
21-30%	11%	10%	10%
31-40%	8%	5%	12%
41-50%	12%	7%	9%
51% plus	33%	41%	26%
Average	48.45%	52.17%	46.03%
% Providing correct estimate or lower	35% or less 38%	35%	33%
Can't say	14%	18%	24%

Sweeney Research

2004 Food of Life Post Campaign Tracking Research Wave 2

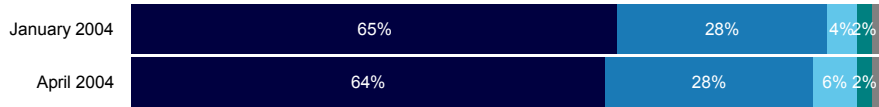
Results for ice cream continue to be significantly overstated – but may reflect aspects related to carbohydrate/calorie content...

Fat Content Estimates – Ice Cream			
Fat Content	Ice Cream		
	Wave 3 2003	Wave 1 2004	Wave 2 2004
None	-	-	-
1%	-	2%	-
2%	-	1%	-
3%	1%	2%	1%
4%	2%	1%	1%
5%	5%	4%	2%
6-9%	3%	4%	6%
10%	11%	5%	7%
11-20%	16%	16%	12%
21-30%	10%	11%	16%
31-40%	6%	11%	10%
41-50%	10%	7%	10%
51% plus	25%	25%	17%
Average	38.9%	40.57%	35.96%
% Providing correct estimate or lower	10% or less 20%	16%	16%
Can't say	16%	16%	21%

Sweeney Research

Perceptions of fattening in terms of impact on weight Trends

Cream



Butter



Ice Cream



Regular Tasty Cheese



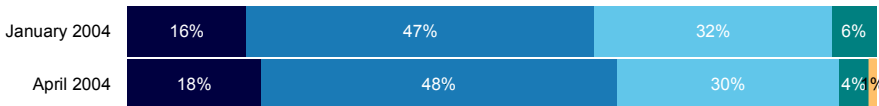
■ Very fattening ■ Fairly fattening ■ Not too fattening ■ Not at all fattening ■ Don't know

Perceptions of fattening in terms of impact on weight Trends (cont)

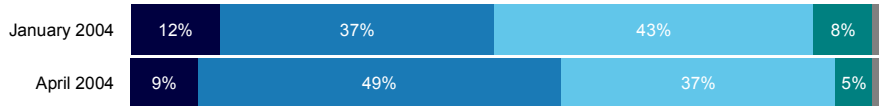
Dairy Spreads or Butter Blends



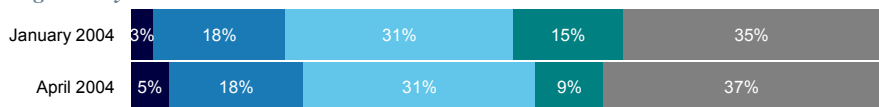
Regular Milk



Regular Yogurt



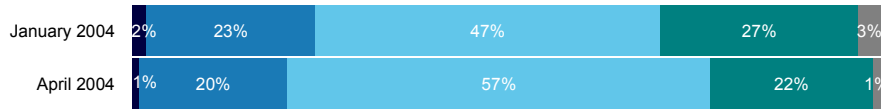
Regular Soy Milk



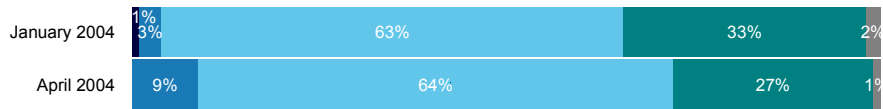
■ Very fattening ■ Fairly fattening ■ Not too fattening ■ Not at all fattening ■ Don't know

Perceptions of fattening in terms of impact on weight
Trends (cont)

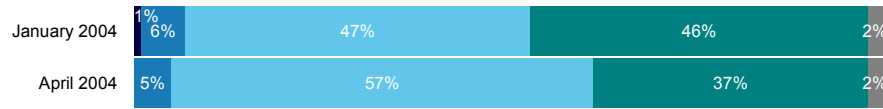
Low Fat Cheese



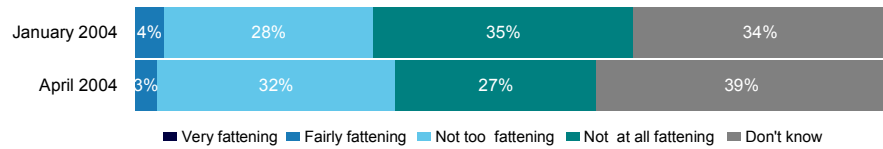
Reduced Fat Milk



Low Fat Yogurt



Reduced Fat Soy Milk



■ Very fattening ■ Fairly fattening ■ Not too fattening ■ Not at all fattening ■ Don't know

Perceptions of fattening in terms of impact on weight
Trends

No Fat Yogurt



Low Fat Milk



■ Very fattening ■ Fairly fattening ■ Not too fattening ■ Not at all fattening ■ Don't know

Perceptions of Fattening

We asked respondents to evaluate each product on a 4-point (very fattening – not at all fattening) scale in terms of impact on weight – that is their perceptions of the total calorie content, not just the fat component.

As shown opposite and overleaf, cream and butter dominate followed by ice cream then regular cheese and dairy blends. Low fat yogurt, low fat milk and no fat yogurt appear at the bottom of the hierarchy with 71% indicating the latter is 'not at all fattening', suggesting the potency of the no fat message.

Results show increased 'fattening' perceptions for regular cheese, regular yogurt and low fat milk.

To What Extent Is Consumption Behaviour Influenced by Perceptions of Fat Content?
Average Fat Estimates – January 2004 and April 2004 Samples Combined

	Personal Consumption			Children's Consumption		
	Ever %	Never %	At Least Twice/Week %	Ever %	Never %	At Least Twice/Week %
Regular milk	27.45	17.8	27.69	26.8	17.51	27.73
Reduced fat milk	6.84	11.82	7.6	5.83	10.63	5.53
Low fat milk	4.40	5.23	4.18	5.37	4.7	4.66
Regular yogurt	25.03	21.40	25.86	23.55	24.41	23.86
Low fat yogurt	6.78	8.83	6.69	6.23	8.1	4.7
Regular tasty cheese	33.06	35.58	31.30	32.46	38.68	32.08
Low fat cheese	12.17	13.9	13.66	13.84	12.57	14.28
Butter blends	38.33	34.8	40.23	38.09	35.93	38.13
Butter	48.35	53.4	46.9	46.39	55.25	43.76
Ice cream	38.02	40.4	31.11	37.48	43.93	36.23
Cream	47.88	52.15	42.62	46.66	52.27	39.45
Regular soy milk	13.83	17.01	N/A	12.88	17.25	13.79
Reduced fat soy milk	8.59	6.42	N/A	N/A	N/A	N/A

To What Extent Do Perceptions of 'Fat Content' Influence Product Consumption?

To answer this question we cross analysed (average) fat estimates for each product by consumption data (ever consume, consume at least twice a week, never consume), for the **combined** Wave 1 and Wave 2 2004 samples (in order to enhance the statistical reliability of the analysis).

Regular Milk

The indications are that both adult and children's consumption patterns are not related to fat perceptions –in both segments consumers and regular consumers give higher fat estimates than non-consumers.

Reduced Fat Milk

For both adult and child segments consumers give lower fat estimates than non-consumers. Given that the lower fat proposition is likely to be a strong consumption driver, we would expect this difference – though we note that even amongst consumers the fat levels are overstated.

Low Fat Milk

No differences by consumption level emerge for adults and children.

Regular Yogurt

No differences by consumption level emerge for adults and children.

Low Fat Yogurt

For the regularly consuming child segment average fat estimates are somewhat lower than for non-consumers.

Regular Cheese

Amongst both adults and children regular consumers provide marginally lower fat estimates than non-consumers.

Low Fat Cheese

No differences by consumption levels emerge for both adults and children.

Butter Blends

Amongst adults regular consumers provide higher than average fat estimates. non-consumers lower fat estimates.

Butter

Amongst both adults and children non-consumers provide higher than average fat estimates.

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Ice Cream

Amongst both adults and children regular consumers provide lower than average fat estimates.

Cream

Amongst both adults and children regular consumers provide lower than average fat estimates.

Soy Milk

Results suggest a high level of consistency by consumption frequency amongst both adult and child segments.

* * * * *

In summary, the relationship between consumption and perceived fat content for regular milk and yogurt indicates that taste and perceived health benefits are stronger consumption motivators than fat concerns. For 'indulgence' products such as regular cheese, ice cream and butter there is some evidence to suggest that high frequency users provide more conservative fat estimates. This could be indicative of...

- 'Rationalisation' of indulgence
- Perceived benefits/enjoyment outweighing health concerns.

We also asked respondents who judged each product as 'very' or 'fairly' fattening whether they **avoid** the product as a result of perceiving the product as fattening.

Results for the **combined** January and April 2004 samples are shown overleaf and indicate that the majority **do not** avoid the product for reasons of fattening. The figures in brackets represent the average fat estimates provided by avoiders and non-avoiders (where sample sizes permit). Once again, these underscore the impact of consumption triggers **unrelated** to fat content for regular milk, regular yogurt, regular cheese, dairy spreads/blends and ice-cream, for which non-avoiders provide higher or comparable fat estimates to avoiders. However we note that for butter and cream a sizeable minority (40%) avoid the product because of fat content and the average fat estimates given by **avoiders** are higher than those given by non-avoiders ...

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Avoidance Behaviour – January 2004 and April 2004 Samples Combined

	Avoid Product	Don't Avoid Product	Don't Know
Regular milk	37% (24.95)	58% (35.98)	5% N/A
Regular soy milk	29%	63%	8%
Regular yogurt	28% (24.24)	64% (29.52)	8% N/A
Regular cheese	28% (33.95)	63% (36.39)	9% N/A
Low fat cheese	12%	80%	8%
Dairy spreads/blends	25% (40.37)	69% (39.09)	5% N/A
Butter	40% (56.48)	54% (45.28)	6% N/A
Ice cream	32% (38.45)	61% (40.35)	6% N/A
Cream	40% (55.51)	55% (45.90)	5% N/A

Note: Figures in brackets represent average fat estimates
Base: Rated each product as very or fairly fattening

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SECTION 5: The Benefits of Dairy Foods

Which Particular Vitamins, Minerals or Nutrients are Contained in Dairy Foods?

	Feb 01	Jun 01	Jun 02	Feb 03	Apr 03	Jun 03	Jan 04	Apr 04
Calcium	85%	89%	85%	90%	94%	← 84%	→ 91%	89%
Protein	0%	5%	5%	→ 26%	→ 34%	33%	← 30%	← 24%
B Vitamins	23%	24%	21%	23%	21%	→ 26%	→ 29%	← 24%
Vitamin A	26%	32%	29%	22%	22%	→ 29%	→ 33%	← 23%
Potassium	7%	15%	12%	18%	15%	12%	→ 15%	11%
Riboflavin	2%	5%	7%	11%	10%	11%	12%	9%
Magnesium	3%	9%	6%	10%	11%	8%	9%	10%
Zinc	2%	11%	8%	9%	11%	5%	6%	8%
Phosphorus	1%	5%	4%	7%	8%	2%	4%	5%
Vitamin C	0%	3%	3%	6%	1%	3%	3%	2%
Iron	0%	8%	12%	6%	2%	6%	4%	6%
Vitamin D	0%	3%	5%	3%	1%	5%	6%	4%
Can't say	9%	9%	10%	8%	5%	11%	5%	8%

Q. Which particular vitamins or minerals are contained in dairy foods?

Understanding of What is Contained in Dairy Foods

As has been the case historically, calcium dominates perceptions.

We note modest downturns in awareness for protein and Vitamins A and B since the 2004 benchmark.

Benefits of Dairy for Adults

	Feb 01	Jun 01	Jun 02	Feb 03	Apr 03	Jun 03	Jan 04	Apr 04
Strong teeth/bones	81%	81%	88%←	80%	81%←	75%	→80%	80%
Prevents osteoporosis	48%	58%	56%	61%	59%←	53%	→60%	56%
General health and well being	0%	24%	21%→	32%	→43%	←34%	→38%	←25%
Growth and development	11%	10%	13%←	22%	24%←	14%	14%	→19%
Provides energy	0%	11%	12%→	19%	23%	23%	24%	←19%
Healthy immune system	5%	9%	7%	14%	11%	7%	→16%	←10%
Provides healthy skin	6%	10%	12%	13%	17%	17%	←12%	12%
Provides healthy eyes	2%	5%	5%	→8%	7%	9%	5%	7%
Healthy hair	0%	2%	0%	7%	9%	8%	6%	6%
Helps learning	1%	4%	3%	4%	7%	3%	7%	3%
Can't say	6%	2%	2%	7%	2%	3%	2%	2%

Q. What would you say are the main health benefits provided by the various vitamins, minerals and nutrients in dairy foods as far as adults are concerned?

Unprompted Benefits of Dairy for Adults

The current results reflect more favourable perceptions for growth and development though reduced playback of 'general health and well being', 'energy' and 'immune system' benefits.

Benefits of Dairy for Children

	Feb 01	Jun 01	Jun 02	Feb 03	Apr 03	Jun 03	Jan 04	Apr 04
Strong teeth/bones	91%	94%	97%	94%	98%	95%	97%	92%
Growth and development	47%	52%	44% →	60%	61%	57% →	46%	46%
General health and well being	0%	31%	28% →	42%	46% ←	39% →	45% ←	27%
Prevents osteoporosis	20%	24%	22% →	29%	24% ←	17% ←	26%	23%
Provides energy	0%	17%	18% →	29%	27%	31%	29% ←	24%
Healthy immune system	12%	14%	12% →	24%	24% ←	17%	20% ←	14%
Provides healthy skin	10%	12%	12% →	18%	17%	17%	19% ←	10%
Helps learning	6%	8%	9%	13%	16%	12%	15%	11%
Provides healthy eyes	4%	9%	7%	11%	9%	12%	10%	8%
Healthy hair	0%	2%	1%	9%	8%	10%	6%	8%
Can't say	4%	1%	1%	4%	1%	3%	1%	2%

Q. What would you say are the main health benefits provided by the various vitamins, minerals and nutrients in dairy foods as far as younger children are concerned?

Unprompted Benefits of Dairy for Children

Unprompted benefits for children reveal the continuing dominance of the strong teeth and bones message.

We note a sizeable downturn in the number of mentions associated with 'general health and well being' and to a lesser extent for 'energy', 'immune system' and 'healthy skin' benefits.

Prompted Benefits

Wave 2 - 2004

	Definitely know it's true	Think it might be true	Not sure	Think it's false	Know it's false	Don't know
Dairy foods help develop strong teeth and bones in young children	84%	13%	3%	1%	1%	-
Dairy foods help strengthen the bones of adults	80%	14%	2%	2%	2%	1%
Dairy foods help the growth and development of young children	73%	20%	6%	1%	-	1%
Dairy foods give children energy	48%	35%	12%	5%	1%	1%
Dairy foods help young children when it comes to concentration and learning	35%	35%	22%	5%	1%	4%
Dairy foods give adults energy	35%	33%	22%	9%	1%	2%
Calcium in dairy foods is better absorbed by the body than calcium from other food or drink sources	28%	32%	33%	5%	1%	2%
Dairy foods help to develop the immune system in young children	27%	46%	19%	5%	2%	2%
Dairy foods help give adults healthy skin and eyes	26%	34%	27%	9%	3%	3%
Dairy foods help the adults' immune system	21%	30%	37%	6%	1%	6%
Dairy foods help give adults healthy hair	18%	25%	37%	13%	2%	5%
Dairy foods improve people's hearing	3%	10%	48%	27%	7%	9%

Prompted Benefits – Wave 2 2004

We read out 12 statements to respondents and asked whether they...

- Definitely know it's true
- Think it might be true
- Are not really sure
- Think it's false
- Know it's false.

The statements are ranked in order of perceived verity in the table opposite.

At the top of the hierarchy is...

"Help develop strong teeth and bones in young children" (84% know it's true)

...followed by 'strengthens the bones of adults' (80%) and the 'helps the growth development of young children' (73%).

Close to half indicate a strong belief that 'dairy foods give children energy' while around one-third that dairy assists with concentration and learning in children and provide adults with energy.

Just over one-quarter are firmly convinced that calcium from dairy is better absorbed than calcium from other sources, dairy helps develop the immune system in young children and gives adults healthy skin and eyes.

One in five strongly associate dairy with enhancing the adult's immune system and hair

Three percent believe that dairy assists with hearing.

Prompted Benefits –
Trends in 'Definitely know its true'

	Feb 01	Jun 01	Jun 02	Feb 03	Apr 03	Jun 03	Jan 04	Apr 04
Dairy foods help develop strong teeth and bones in young children	89%	93%	89%	89%	91%	95%	←87%	←84%
Dairy foods help strengthen the bones of adults	78%	87%	79%	80%	77%	→90%	←71%	→80%
Dairy foods help the growth and development of young children	84%	88%	75%	75%	75%	→89%	←78%	←73%
Dairy foods give adults energy	39%	52%	36%	35%	30%	→47%	←33%	35%
Dairy foods help to develop the immune system in young children	31%	39%	27%	27%	32%	→45%	←29%	27%
Dairy foods help young children when it comes to concentration and learning	18%	43%	23%	23%	27%	→41%	38%	35%
Dairy foods help the adults' immune system	18%	26%	17%	22%	18%	→28%	←22%	21%
Dairy foods help give adults healthy skin and eyes	17%	35%	22%	20%	19%	→28%	24%	26%
Dairy foods help give adults healthy hair	N/A	N/A	N/A	13%	←10%	→20%	←15%	18%
Dairy foods improve people's hearing	5%	7%	3%	3%	5%	3%	6%	3%
Calcium in dairy foods is better absorbed by the body than calcium from other food or drink sources	N/A	N/A	N/A	N/A	N/A	N/A	26%	28%
Dairy foods give children energy	N/A	N/A	N/A	N/A	N/A	N/A	43%	→48%

2004 Food of Life Post Campaign Tracking Research Wave 2

Prompted Benefits – Longer Term Trends

Relative to the January 2004 benchmark we note greater conviction associated with 'strengthening the bones of adults' and 'giving children energy'.

However, we note a further downturn for 'helps the growth and development of young children' – with results being comparable to those of June 2002 and February and April 2003.

A further, albeit modest, decline is apparent for the leading 'strong teeth and bones in young children' benefit, with the current result being the lowest to date.

SECTION 6: The Position of Dairy Relative to Other Food Groups

Rating of Essentiality for a 'Healthy Lifestyle for Women Like You'

April 2004

	Essential	Extremely or very important	Quite or a little important	Not important	Don't know
Red Meat	33%	45%	18%	5%	-
Dairy products	49%	40%	9%	3%	-
Fruit and vegetables	67%	31%	3%	1%	-
Soy products	6%	9%	26%	46%	15%

Trends - Rate as Essential

	Feb 01	Jun 01	Jun 02	Feb 03	Apr 03	Jun 03	Jan 04	Apr 04
Red Meat	43%	32%	38%	41%	← 34%	33%	30%	33%
Dairy products	56%	52%	55%	55%	← 46%	→ 57%	→ 46%	→ 49%
Fruit and vegetables	68%	68%	65%	→ 79%	← 69%	72%	68%	67%
Soy products	7%	9%	7%	8%	8%	6%	7%	6%

2004 Food of Life Post Campaign Tracking Research Wave 2

Essential for a Healthy Lifestyle

All respondents were asked to rate the extent to which they felt...

- Red meat
- Dairy products
- Fruit and vegetables
- Soy products

...were essential for a healthy lifestyle for women like themselves.

Fruit and vegetables are clearly in first position on this measure with 67% rating as 'essential' and most of the balance as 'extremely' or 'very' important.

Dairy foods are next in line. Here, 49% rate as essential and 40% as 'extremely' or 'very' important.

By contrast, to dairy, only a small minority rate **soy** products as being important for a healthy diet – just 15% rate as at least very important versus 89% for dairy.

Red meat tends to polarise views – whilst 33% rate as 'essential' 23% evaluate as 'quite important' or less so.

Trends reveal a modest top box improvement for dairy from the January 2004 low...

Rating of Essentiality for a 'Healthy Lifestyle for Women Like You'
Dairy products trends in detail

	Feb 01	Jun 01	Jun 02	Feb 03	Apr 03	Jun 03	Jan 04	Apr 04
Essential	56%	52%	55%	55%	46%	57%	46%	49%
Extremely important	18%	21%	20%	21%	32%	16%	22%	19%
Very important	20%	16%	13%	14%	15%	16%	17%	21%
Quite important	3%	7%	8%	5%	4%	7%	8%	8%
A little bit important	1%	3%	2%	3%	3%	5%	5%	1%
Not too important	1%	1%	1%	3%	0%	1%	3%	2%
Not important at all	1%	1%	0%	1%	1%	-	2%	1%
% Essential/ Extremely/Very Important	94%	89%	87%	90%	92%	88%	84%	89%

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Rating of Essentiality for a the 'Growth and Development of Children'

April 2004

	Essential	Extremely or very important	Quite or a little important	Not important	Don't know
Red Meat	42%	47%	11%	2%	1%
Dairy products	66%	30%	3%	2%	1%
Fruit and vegetables	77%	22%	1%	-	1%
Soy products	6%	10%	21%	45%	20%

Trends - Rate as Essential

	Feb 01	Jun 01	Jun 02	Feb 03	Apr 03	Jun 03	Jan 04	Apr 04
Red Meat	57%	43%	49%	46%	← 40% →	45%	42%	42%
Dairy products	77%	69%	72%	72%	← 67% →	75%	← 67%	66%
Fruit and vegetables	79%	75%	79%	→ 84%	← 76% →	80%	80%	77%
Soy products	10%	16%	9%	7%	11%	11%	10%	6%

2004 Food of Life Post Campaign Tracking Research Wave 2

Importance for the Growth and Development of Children

Respondents rated the four food groups in terms of their essentiality for the growth and development of children.

Again, fruit and vegetables tops the list – with 77% rating as essential. The comparable figure for dairy is 66%, in line with the January 2004 benchmark, though still below the June 2003 peak.

The full distribution is provided below...

Rating of Essentiality for a the 'Growth and Development of Children'
Dairy products trends in detail

	Feb 01	Jun 01	Jun 02	Feb 03	Apr 03	Jun 03	Jan 04	Apr 04
Essential	77%	69%	72%	72%	67%	75%	67%	66%
Extremely important	11%	19%	16%	16%	22%	16%	13%	18%
Very important	9%	9%	5%	10%	8%	8%	16%	12%
Quite important	1%	2%	5%	1%	2%	2%	3%	1%
A little bit important	2%	0%	0%	1%	1%	1%	1%	2%
Not too important	0%	0%	0%	1%	0%	1%	-	1%
Not important at all	1%	1%	0%	0%	1%	-	1%	1%
% Essential/ Extremely/Very Important	97%	97%	93%	98%	97%	98%	96%	96%

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Rating of 'Supply a Very Wide Range of Essential Vitamins, Minerals and Nutrients'

April 2004

	Very wide variety	Fairly wide variety	Just one or two	Don't really provide any	Don't know
Red Meat	33%	47%	18%	1%	2%
Dairy products	47%	45%	7%	-	1%
Fruit and vegetables	80%	18%	2%	-	1%
Soy products	11%	22%	26%	6%	37%

Trends - Very Wide Variety

	Feb 01	Jun 01	Jun 02	Feb 03	Apr 03	Jun 03	Jan 04	Apr 04
Red Meat	44%	44%	41% ←	34% →	42% ←	35%	30%	33%
Dairy products	66%	71%	57% ←	44% →	55% →	65% ←	52% ←	47%
Fruit and vegetables	85%	91%	80% →	85%	82% →	86%	83%	80%
Soy products	19%	25%	13%	15%	15%	15%	13%	11%

2004 Food of Life Post Campaign Tracking Research Wave 2

Supplying a Wide Variety of Essential Vitamins, Minerals and Nutrients

Fruit and vegetables are most highly regarded on this measure – with 80% rating at the top of the scale. Forty-seven percent rate dairy foods at this level well above the 33% for red meat and the 11% low for soy.

Trends reveal a further downward shift for dairy with the current result falling at February 2003 levels .

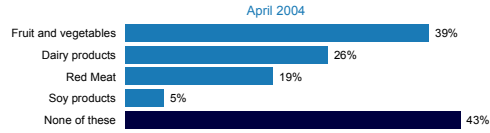
The decline is primarily attributable to a downward shift from the top box to the second box...

Rating of 'Supply a Very Wide Range of Essential Vitamins, Minerals and Nutrients'
Dairy products trends in detail

	Feb 01	Jun 01	Jun 02	Feb 03	Apr 03	Jun 03	Jan 04	Apr 04
Provide very wide variety	66%	71%	57%	44%	55%	65%	52%	47%
Provide fairly wide variety	27%	25%	34%	38%	38%	27%	37%	45%
Provide just one or two	6%	3%	6%	16%	5%	8%	11%	7%
Don't really provide any	0%	0%	1%	0%	1%	-	-	-
Don't know	1%	1%	1%	3%	2%	1%	1%	1%
% Very/Fairly wide variety	93%	96%	91%	82%	93%	92%	89%	92%

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Which, if any, of These Food Types have You Deliberately Increased Your Consumption of in the Last Year or So?



Trends

	Feb 01	Jun 01	Jun 02	Feb 03	Apr 03	Jun 03	Jan 04	Apr 04
Red Meat	8%	5%	14%	11%	9%	15%	20%	19%
Dairy products	20%	19%	20%	28%	21%	18%	27%	26%
Fruit and vegetables	40%	32%	36%	63%	40%	25%	39%	39%
Soy products	6%	3%	3%	12%	7%	6%	7%	5%
None of these	42%	55%	47%	32%	55%	56%	46%	43%

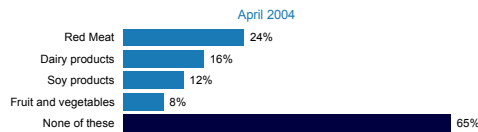
Which, if any, of These Food Types have You Deliberately Decreased Your Consumption of in the Last Year or So?



Trends

	Feb 01	Jun 01	Jun 02	Feb 03	Apr 03	Jun 03	Jan 04	Apr 04
Red Meat	21%	14%	12%	8%	8%	9%	18%	13%
Dairy products	5%	5%	12%	9%	6%	7%	5%	6%
Fruit and vegetables	2%	0%	0%	1%	0%	0%	1%	1%
Soy products	10%	3%	7%	8%	10%	5%	7%	10%
None of these	68%	79%	70%	77%	80%	81%	72%	73%

Which of These Food Types do You Believe it is Important to Limit Consumption of to Avoid Possible Health Problems?



Trends

	Feb 01	Jun 01	Jun 02	Feb 03	Apr 03	Jun 03	Jan 04	Apr 04
Red Meat	57%	45%	46%	50%	44%	52%	28%	24%
Dairy products	36%	26%	31%	27%	30%	33%	27%	16%
Fruit and vegetables	13%	13%	9%	6%	13%	19%	14%	8%
Soy products	20%	18%	18%	26%	21%	27%	20%	12%
None of these	26%	45%	39%	34%	45%	37%	59%	65%

2004 Food of Life Post Campaign Tracking Research Wave 2

Limit, Decrease and Increase Consumption

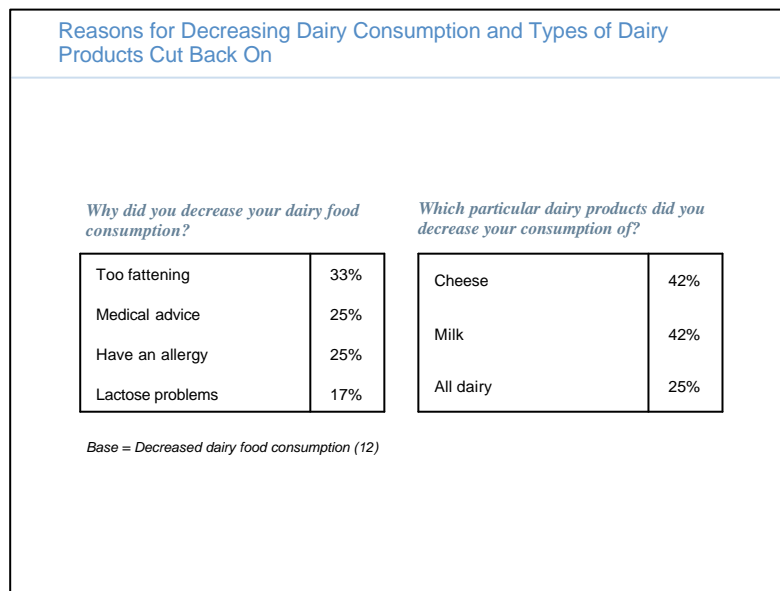
Respondents were asked about their **behaviour** – to what extent had they increased or decreased consumption of these products over the last year.

Some 26% overall claimed to have **increased** consumption of dairy – consistent with the January 2004 result and an improvement on the June 2003 low.

Six percent have **decreased** consumption. Results continue to remain below the June 2002 peak of 12%.

The 6% (12 respondents) who **decreased** their dairy consumption were asked why they had done so.

The chart below summarises...



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Fat content, allergies and medical advice emerged as the major triggers.

Respondents were asked which, if any, of the four food groups they believe it is...

“Important to limit consumption of to avoid possible health problems”

Red meat (24%) is most often nominated, followed by dairy (16%) and soy (12%) then fruit and vegetables (8%).

A further decline in the incidence of **limiting** dairy is apparent – with the April 2004 result being the most favourable result to date.

The current result for red meat is also the most favourable to date – with a relatively low 24% indicating they believe it is important to **limit** consumption.

SECTION 7: Personal Behaviour

Overall Attitude to Dairy Consumption

	Feb 01	Jun 01	Jun 02	Feb 03	Apr 03	Jun 03	Jan 04	Apr 04
I avoid dairy foods completely	1%	1%	2%	0%	1%	1%	2%	1%
I try to limit my consumption of dairy food	15%	11%	14%	13%	9% →	19%	10%	18%
I don't pay any attention to my dairy food consumption	14%	12%	12%	21% ←	13%	15%	17%	14%
I try to make sure I consume enough dairy foods	70%	76%	72%	67% →	77% ←	65% →	71% ←	67%

Q. Which of these statements best describes your personal approach to dairy food consumption?

Overall Approach to Dairy Consumption

In the current wave just 1% avoided dairy food completely while 18% attempted to limit their consumption.

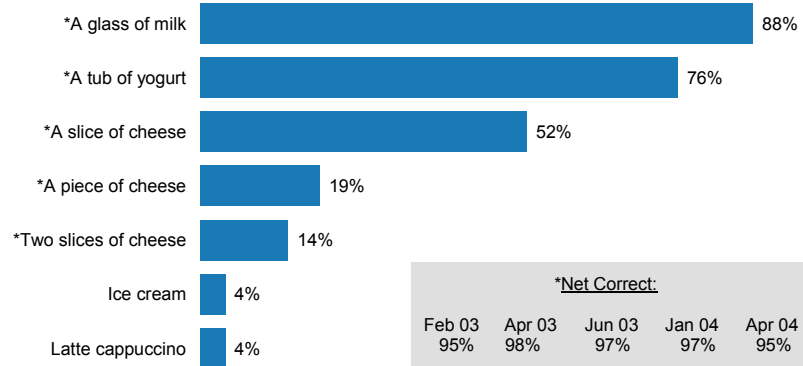
While 14% pay no real attention to dairy food consumption 67% selected the statement...

"I try to make sure I consume enough dairy foods"

Results reflect a decline in the top box rating. We also note an increase in the proportion who avoid or limit consumption (19%), which has rebounded to the June 2003 figure.

Understanding a Serve of Dairy Foods

Wave 2 – April 2004



Q. Some people say that a certain number of serves of dairy food are required as part of a healthy diet. What would you believe a 'serve of dairy food' is? Can you give me some examples?

What is a Serve of Dairy?

Respondents' perceptions of what constitutes a serve of dairy was also canvassed.

The most frequent responses were...

- A glass of milk (88%)
- A tub of yogurt (76%)
- A slice of cheese (52%)

...followed by...

- A piece of cheese (19%)
- Two slices of cheese (14%).

Overall 95% mentioned at least one of the above – in line with historical results.

Perceptions of Number of Serves Required for Adults

	Feb 01	Jun 01	Jun 02	Feb 03	Apr 03	Jun 03	Jan 04	Apr 04
None	1%	1%	*	2%	1%	-	2%	2%
One	9%	9%	7%	10%	8%	9%	6%	10%
Two	28%	28%	30%	31%	36%	25%	21%	26%
Three	49%	49%	52%	44%	47%	57%	61%	53%
Four or more	11%	12%	8%	10%	7%	9%	10%	9%
Don't know	4%	2%	2%	4%	3%	-	1%	1%
% Three or more	60%	61%	60%	←54%	54%	→66%	71%	←62%

Q. How many serves of dairy food per day do you believe is a healthy target for adults like you?
IF ASKED.. A serve is a glass of milk or a piece of cheese or a tub of yogurt

Extent to Which Adults Try to Achieve the Serve Target Summary of Trends

	Feb 01	Jun 01	Jun 02	Feb 03	Apr 03	Jun 03	Jan 04	Apr 04
I make a determined effort to consume that amount	25%	34%	32%	31%	38%	30%	32%	←26%
I make some effort	51%	45%	48%	42%	41%	47%	46%	46%
I don't worry about it that much	19%	15%	16%	21%	17%	17%	13%	21%
I don't worry about it at all	4%	6%	5%	6%	4%	7%	8%	7%
% at least some effort	76%	79%	80%	73%	79%	77%	78%	72%

Q. Which of the following statements best describes the extent to which you try to achieve that target?

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Target Number of Serves

Respondents were asked...

“How many serves of dairy food per day do you believe is a healthy target for adults like you?”

In the current wave 53% nominated three serves – with 9% advocating more than this amount.

The 62% ‘three or more’ figure represents a decline on the January 2004 peak – though is comparable if not marginally better than the historical results.

Respondents who nominated a healthy target were asked where they acquired this information. As shown below TV advertising continues to be the predominant source...

Source of Awareness

	Feb 03	Apr 03	Jun 03	Jan 04	Apr 04
TV advertising	51%	47%	51%	47%	53%
Family	22%	27%	22%	21%	18%
School	22%	21%	19%	24%	18%
Health professionals/Doctor etc.	16%	19%	25%	16%	16%
Magazine/press advertising	18%	12%	13%	16%	16%
Information on dairy products	14%	12%	12%	11%	11%
Friends	7%	12%	6%	7%	9%
Articles in magazines/press	13%	10%	8%	10%	7%
Supermarket advertising	3%	6%	2%	4%	1%
Information on cereal box	4%	3%	2%	6%	3%
Can't recall	11%	19%	16%	14%	13%

Q. Where did you learn about the number of serves of dairy food required for adults?

We then went on to ask the extent to which people make an effort to consume the amount they nominated. As illustrated **opposite**, some 26% make ‘a determined effort’ to consume that amount and a further 46% make ‘some effort’.

The proportion making a ‘determined effort’ has declined since January 2004 and is comparable to the February 2001 low.

In the table overleaf we look at the level of effort by the number of serves consumers nominated in the first place.

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Extent to Which People Try to Achieve the Serve Target by Number of Serves

	Total	1 or 2 serves	3 serves plus
<i>Proportion of population</i>	100%	36%	64%
Make determined effort	26%	27%	26%
Make some effort	46%	44%	48%
Don't worry that much	21%	17%	23%
Don't worry at all	7%	13%	4%

In total 16% believe that adults should consume three or more serves and make a determined effort to consume that amount

In total 16% believe that adults should consume three or more serves **and** make a determined effort to do so.

The current result reflects a deterioration on the 2004 benchmark in terms of the proportion of consumers who make **at least some effort to consume 3 or more serves...**

Perceptions and Behaviour with Respect to Number of Serves Trends

Perceptions of a Healthy Target	Effort Made to Consume This Amount	Feb 01	Jun 01	Jun 02	Feb 03	Apr 03	Jun 03	Jan 04	Apr 04
Three or more serves	A determined effort	13%	23%	20%	19%	19%	20%	23%	16%
	Some effort	31%	29%	27%	23%	28%	30%	35%	30%
	No real effort	15%	9%	12%	12%	7%	16%	14%	17%
Less than three serves	A determined effort	11%	11%	10%	10%	18%	10%	10%	10%
	Some effort	18%	15%	20%	17%	12%	17%	10%	16%
	No real effort	7%	11%	7%	14%	13%	8%	7%	11%
Don't know		4%	2%	2%	4%	3%	-	1%	1%
None		1%	1%	-	2%	1%	-	2%	2%
% at least some effort to consume 3 or more serves		44%	52%	47%	42%	47%	50%	58%	46%

When asked whether they should be consuming more or less dairy...

- 29% felt they ought to be consuming more dairy – in line with the buoyant June 2003 and January 2004 results.
- 4% they ought to be consuming less
- 68% were happy with the amount they consume.

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Perception of Whether They Should be Consuming More or Less

<i>And, overall do you believe that you ought to be consuming...</i>	Feb 01	Jun 01	Jun 02	Feb 03	Apr 03	Jun 03	Jan 04	Apr 04
More dairy foods than you do now	22%	20%	22%	24%	20%	29%	27%	29%
Less dairy foods	2%	3%	3%	8%	3%	2%	4%	4%
About the same amount	76%	77%	75%	69%	78%	70%	70%	68%

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Difficulty in Achieving Target for Adults

	Feb 03	Apr 03	Jun 03	Jan 04	Apr 04
Not difficult at all	72%	68%	71%	76%	← 70%
It requires a bit of an effort	25%	26%	26%	21%	24%
Reasonably difficult	3%	4%	3%	3%	6%
It's very difficult	0%	1%	1%	-	1%

Q. Which of these statements best describes how difficult it is to reach the total of these serves?

Ease of Reaching a Healthy Serve Target for Adults

Seven in ten (of those who nominated a healthy target) indicated that achieving this aim was 'not difficult at all'.

One-quarter indicated it required 'a bit of effort'.

Around one in twenty encountered some difficulties.

The current results reflect a modest downturn from the January 2004 peak.

SECTION 8: Behaviour with Respect to Children

(All respondents aged 18-39 with children up to 13 years)

Overall Attitude to Children's Dairy Consumption

<i>Thinking about your children under 13, do you...</i>	Feb 01	Jun 01	Jun 02	Feb 03	Apr 03	Jun 03	Jan 04	Apr 04
Ensure that they avoid dairy foods completely	1%	2%	2%	6%	2%	4%	→ 13%	← 4%
Try to restrict their consumption	2%	3%	3%	7%	2%	1%	2%	6%
Don't really pay any attention to their consumption	2%	3%	3%	6%	1%	3%	4%	5%
Try to make sure they consume enough	93%	92%	92%	← 80%	→ 94%	91%	← 78%	82%
Don't know	3%	1%	0%	1%	1%	1%	3%	3%

Overall Approach to Children's Dairy Food Consumption

In the current wave 82% of mothers say they try to ensure their children consume sufficient dairy, a modest improvement on the January 2004 low and well below the 2003 post campaign results.

While **avoidance** behaviour has diminished, we note an increase in the proportion who restrict/don't pay any attention to their children's consumption.

Perceptions of Number of Serves Required for Children

	Feb 01	Jun 01	Jun 02	Feb 03	Apr 03	Jun 03	Jan 04	Apr 04
None	1%	1%	0%	1%	0%	0%	13%	← 5%
One	3%	1%	1%	4%	3%	1%	3%	6%
Two	12%	7%	11%	14%	11%	7%	5%	8%
Three	41%	46%	65%	54%	60%	54%	47%	56%
Four or more	40%	43%	21%	25%	25%	38%	31%	24%
Don't know	2%	5%	2%	3%	1%	-	1%	1%
% Three or more	81%	89%	86%	← 79%	→ 85%	→ 92%	← 78%	80%

Q. How many serves of dairy food per day do you believe is a healthy target for children under 13?

Extent to Which Mothers Try to Achieve the Serve Target for Children Summary of Trends

	Feb 01	Jun 01	Jun 02	Feb 03	Apr 03	Jun 03	Jan 04	Apr 04
I make a determined effort to see that they consume that amount	50%	64%	58%	← 47%	→ 65%	→ 60%	60%	← 54%
I make some effort	43%	29%	35%	40%	28%	29%	28%	34%
I don't worry about it that much	5%	5%	4%	9%	3%	5%	8%	5%
I don't worry about it at all	1%	2%	1%	3%	2%	5%	3%	5%

Q. Which of the following statements best describes the extent to which you try to achieve that target for your children?

2004 Food of Life Post Campaign Tracking Research Wave 2

Number of Serves for Children

In the current wave 80% recognise that three serves (56%) or four or more serves (24%) is a healthy target for children under 13 – and 19% nominated two or fewer. The proportion nominating three or more serves is comparable to the February 2003 and January 2004 results. Fifty-four percent of the mothers interviewed say that they make a determined effort to ensure that their children achieve the nominated target – a decline on the January 2004 results.

In the table below we look at the effort to achieve a healthy target by the number of serves nominated...

Extent to Which Mothers Try to Achieve the Serve Target for Children by Number of Serves

	Total	None	1 or 2 serves	3 Plus Serves
Proportion of population	100%	5%	14%	80%
Make determined effort	54%	N/A	44%	56%
Make some effort	34%	N/A	33%	34%
Don't worry that much	5%	N/A	22%	2%
Don't worry at all	5%	N/A	-	5%
Can't say	2%	N/A	-	3%

In total 44% believe that children should consume three or more serves and make a determined effort to consume that amount

The chart below looks at this in more detail and shows that the current result is in line with the February 2003 and January 2004 lows and well below the 2003 post campaign results ...

Perceptions and Behaviour with Respect to Number of Serves for Children Trends

Perceptions of a Healthy Target	Effort Made to Consume This Amount	Feb 01	Jun 01	Jun 02	Feb 03	Apr 03	Jun 03	Jan 04	Apr 04
Three or more serves	A determined effort	44%	57%	53%	39%	67%	54%	47%	44%
	Some effort	34%	26%	28%	29%	24%	28%	22%	27%
	No real effort	5%	6%	5%	9%	3%	10%	8%	6%
Less than three serves	A determined effort	6%	5%	4%	6%	7%	6%	5%	6%
	Some effort	9%	3%	7%	9%	5%	1%	2%	5%
	No real effort	*	1%	1%	3%	2%	1%	2%	3%
Don't know		2%	5%	2%	3%	1%	-	1%	3%
None		1%	1%	0%	1%	0%	0%	13%	5%
% at least some effort to consume 3 plus serves		78%	83%	81%	68%	81%	82%	69%	71%

Sweeney Research

Perceptions of Whether Children Should be Consuming More or Less

And, overall, do you believe that your children ought to be consuming...

	Feb 01	Jun 01	Jun 02	Feb 03	Apr 03	Jun 03	Jan 04	Apr 04
More dairy foods than they do now	19%	10%	14%	17%	13%	17%	10%	20%
Less dairy foods	2%	2%	1%	2%	1%	1%	2%	1%
About the same amount	78%	87%	85%	80%	86%	82%	88%	79%

2004 Food of Life Post Campaign Tracking Research Wave 2

As shown opposite, we see that the vast majority (79%) are happy with the amount of dairy food consumed by their children. Twenty percent would like their children to be consuming more dairy food than they do now – up from the 10% reported in the benchmark.

Difficulty in Achieving Target for Children

	Feb 03	Apr 03	Jun 03	Jan 04	Apr 04
Not difficult at all	66%	70%	83%	83%	← 78%
It requires a bit of an effort	29%	26%	15%	14%	15%
Reasonably difficult	3%	2%	2%	3%	5%
It's very difficult	2%	1%	-	1%	2%

Q. Which of these statements best describes how difficult it is to reach the total of these serves for your children under 13?

Ease of Reaching Healthy Serve Target

Just under eight in ten encountered no difficulties achieving the nominated serve target for their children while 15% indicated a 'bit of effort' was involved.

Just 7% reported some difficulties.

The April 2004 results are marginally lower than the June 2003 and January 2004 results, though represent an improvement on the February and April 2003 findings.

SECTION 9: General Attitudes towards Health and Nutrition

Attitudinal Trends

	Agree Strongly						Total Agree					
	2003			2004			2003			2004		
	W1	W2	W3	W1	W2	Average	W1	W2	W3	W1	W2	Average
One of my main priorities is to provide healthy meals for me and my family	46%	37%	51%	55%	53%	48%	89%	92%	90%	94%	96%	92%
I'm very careful about what I eat	28%	21%	27%	23%	31%	26%	78%	75%	76%	81%	80%	78%
It's very important to me that vitamins and minerals in foods are naturally occurring rather than artificially introduced	32%	26%	34%	32%	30%	31%	74%	71%	70%	77%	66%	72%
*I actively restrict the amount of fat in my diet	27%	24%	30%	17%	18%	23%	66%	63%	62%	62%	62%	64%
I don't really worry about health and nutrition, I eat what I like	10%	6%	10%	5%	5%	7%	30%	30%	30%	32%	21%	29%
A vegetarian diet is the healthiest kind of diet	4%	4%	1%	2%	3%	3%	15%	12%	7%	15%	10%	12%
I am a keep fit or exercise fanatic	6%	4%	11%	9%	8%	8%	29%	27%	31%	35%	34%	31%
I often read food labels to check that the food contains vitamins, nutrients and minerals that will be good for me and my family	23%	18%	28%	21%	24%	23%	63%	50%	64%	62%	69%	62%
Nowadays there is much conflicting information about what are the right foods to eat, so I just eat everything I like in moderation	18%	16%	25%	18%	20%	19%	61%	64%	66%	62%	60%	63%
I experiment a lot with new recipe ideas	20%	16%	24%	24%	25%	22%	66%	53%	59%	68%	65%	62%
I eat fast food at least once or twice a week	15%	8%	16%	17%	13%	14%	42%	48%	57%	54%	41%	48%
I am a good cook, but I don't have time to cook	9%	6%	7%	13%	15%	10%	39%	40%	27%	50%	47%	41%
I very strictly watch what my children eat	28%	23%	31%	38%	31%	30%	66%	63%	71%	83%	83%	73%

*Note: Wave 3 2003 and prior wording "I am very conscious of restricting the amount of fat in my diet"

Attitudinal Trends on Health, Diet and Nutrition

The most noteworthy shifts since the 2004 benchmark are ...

- Greater vigilance (at the agree strongly level) concerning personal dietary habits, though less vigilance (at the agree strongly level) concerning children's dietary habits
- Less conviction (at the total agree level) concerning the importance of naturally occurring vitamins and minerals
- Lower levels of total agreement that 'I don't really worry about health and nutrition, I eat what I like'
- Greater involvement with reading food labels (at the total agree level)
- A reduction in regular consumption of fast food (lower total agreement levels).

APPENDIX 1: The Questionnaire



**Consumer Tracking
 Wave 2 Post Campaign
 2004**

Study No. 13973

31 March 2004

INTRODUCTION

Good morning/afternoon/evening. My name is (.....) from Sweeney Research, the market research company. We are conducting a survey on food products and need to speak to **mothers with children at home who are aged up to 20 years of age.**

ON CONTACT RE-INTRODUCE THEN ASK S1

S1. Do you or any of your immediate family work in any of the following industries? (READ OUT)	(Terminate)	Advertising	1
	(Terminate)	Market research.....	2
	(Terminate)	Food or drink manufacturing.....	3
	(Continue)	None of these.....	4

S2. SHOW CARD 1 To make sure that we talk to a wide range of people, please could you tell me a few details about your household? Firstly, which of these age groups do you belong to?	(Terminate)	Under 18.....	01
	(Continue)	18 – 19	02
	(Continue)	20 – 24	03
	(Continue)	25 – 29	04
	(Continue)	30 – 34	05
	(Continue)	35 – 39	06
	(Terminate)	40 or over.....	07

S3. Into which age group(s) does your child or children at home fall?	Under 4.....	1
	4 – 6	2
	7 – 12	3
	13 – 15	4
	16 – 19	5
	20 or over.....	6

S4. Record City...	Melbourne	1
	Sydney.....	2

S5. Are you the main grocery buyer for your household?	Yes	1
	No	2

MAIN QUESTIONNAIRE

SECTION 1: GENERAL ATTITUDES TO HEALTH NUTRITION

Q1.	SHOW CARD 2						
	I'm going to read some statements about health and nutrition. Using this Card, please tell me the extent to which you agree or disagree with each statement. (READ OUT – ROTATE ORDER OF STATEMENTS - *START)						
		Agree Strongly	Agree Somewhat	Neither/ Nor	Disagree Somewhat	Disagree Strongly	Don't Know
1.	I'm very careful about what I eat	5	4	3	2	1	6
2.	I am a keep fit or exercise fanatic	5	4	3	2	1	6
3.	I often read food labels to check that the food contains vitamins, minerals and nutrients that will be good for me and my family	5	4	3	2	1	6
4.	I don't really worry about health and nutrition, I eat what I like	5	4	3	2	1	6
5.	It's very important to me that vitamins and minerals in foods are naturally occurring rather than artificially introduced	5	4	3	2	1	6
6.	I very strictly watch what my children eat	5	4	3	2	1	6
7.	Nowadays there is much conflicting information about what are the right foods to eat, so I just eat everything I like in moderation	5	4	3	2	1	6
8.	One of my main priorities is to provide healthy meals for me and my family	5	4	3	2	1	6
9.	I experiment a lot with new recipe ideas	5	4	3	2	1	6
10.	I am a good cook, but I don't have time to cook	5	4	3	2	1	6
11.	A vegetarian diet is the healthiest kind of diet	5	4	3	2	1	6
12.	I eat fast food at least once or twice a week	5	4	3	2	1	6
13.	I actively restrict the amount of fat in my diet	5	4	3	2	1	6

**SECTION 2:
THE FOOD GROUPS**

Q2a. SHOW CARD 3

I'm going to read out some food groups. Using the card, how important do you feel each of the following is **for a healthy lifestyle for women like you?** (READ OUT – ROTATE ORDER)

	Red Meat such as Beef or Lamb	Dairy Products such as Milk, Cheese or Yoghurt	Fruit and Vegetables	Soy Products such as Soy Milk, Soy Spreads or Soy Yoghurt
Essential.....	1	1	1	1
Extremely important	2	2	2	2
Very important	3	3	3	3
Quite important	4	4	4	4
A little bit important.....	5	5	5	5
Not too important.....	6	6	6	6
Not important at all	7	7	7	7
Don't know.....	8	8	8	8

b. STILL SHOW CARD 3

And how important do you feel each of the following is **for the growth and development of children?** (READ OUT – ROTATE ORDER)

	Red Meat such as Beef or Lamb	Dairy Products such as Milk, Cheese or Yoghurt	Fruit and Vegetables	Soy Products such as Soy Milk, Soy Spreads or Soy Yoghurt
Essential.....	1	1	1	1
Extremely important	2	2	2	2
Very important	3	3	3	3
Quite important	4	4	4	4
A little bit important.....	5	5	5	5
Not too important.....	6	6	6	6
Not important at all	7	7	7	7
Don't know.....	8	8	8	8

Q2c. SHOW CARD 4

To what extent do you believe the following food groups supply a **wide variety of essential vitamins, minerals and nutrients?** (READ OUT – ROTATE ORDER)

	Red Meat such as Beef or Lamb	Dairy Products such as Milk, Cheese or Yoghurt	Fruit and Vegetables	Soy Products such as Soy Milk, Soy Spreads or Soy Yoghurt
1. Provide a very wide variety of essential vitamins, minerals and nutrients	1	1	1	1
2. Provide a fairly wide variety of essential vitamins, minerals and nutrients	2	2	2	2
3. Provide just one or two essential vitamins, minerals and nutrients	3	3	3	3
4. Don't really provide any vitamins, minerals or nutrients at all	4	4	4	4
5. Don't know.....	5	5	5	5

Q3. SHOW CARD 5

This card lists some of the main food groups.

- a. Which, if any, of these food types have you **deliberately increased** your consumption of in the last year or so? (PROBE : WHICH OTHERS)
- b. Which, if any, of these food types have you **deliberately decreased** your consumption of in the last year or so? (PROBE : WHICH OTHERS)
- c. Which of these food types, if any, do you believe it is **important to limit consumption of to avoid possible health problems?** (PROBE : WHICH OTHERS)

	a. Increased	b. Decreased	c. Limit
1. Red meat such as beef or lamb.....	1	1	1
2. Dairy products such as milk, cheese or yoghurt.....	2	2	2
3. Fruit and vegetables	3	3	3
4. Soy products such as soy milk, soy spread or soy yoghurt.....	4	4	4
5. None.....	5	5	5

ASK 3d to 3e IF DAIRY FOOD CONSUMPTION DECREASED IN Q3b

d. Why did you decrease your consumption of dairy food?

Q3e. Which particular dairy products did you decrease your consumption of?	All dairy foods	1
	Milk.....	2
	Cheese	3
	Yoghurt	4
	Butter.....	5
	Other (specify).....	

**SECTION 3:
ADVERTISING INITIATIVES**

SHOW STILLS FOR AD P (Wiggles Ad)

Q4a. Do you recall seeing this ad on TV?	(Continue)	Yes	1
	(Go to Q5)	No.....	2

b. What was the main message the ad was trying to get across? **(DO NOT PROMPT)**

c. What else was the ad trying to say? **(DO NOT PROMPT)**

d. SHOW CARD 6 Which of these phrases do you think apply to this ad – you may say as many or as few of them as you like. (MULTIPLE RESPONSE)	The claims made in the ad are believable	1
	Told me something I didn't know	2
	It was an ad that grabbed my attention	3
	It was an ad which I would enjoy watching again.....	4
	It was quite different to advertising for other types of food...	5
	It is easy to understand	6
	It is aimed at people like me	7
	(None of these).....	8

Q4e. SHOW CARD 7 Which, if any, of these types of foods sponsor the Wiggles ad? READ OUT	Meat, fish, poultry and eggs	1
	Dairy products such as milk, cheese or yogurt	2
	Fruit and vegetables	3
	Breads, cereals, rice and pasta.....	4
	(None of the above)	5
	(Don't know)	6

Q5a. Have you ever watched the TV program called 'Fresh' on Channel 9?	(Continue) Yes	1
	(Go to Q6) No	2

b. SHOW CARD 7 AGAIN Which, if any, of these types of foods sponsor the Fresh program? READ OUT	Meat, fish, poultry and eggs	1
	Dairy products such as milk, cheese or yogurt	2
	Fruit and vegetables	3
	Breads, cereals, rice and pasta.....	4
	(None of the above)	5
	(Don't know)	6

**SECTION 4:
ATTITUDES TOWARDS DAIRY FOOD**

Q6. SHOW CARD 8						
I'm going to read some statements about dairy food and health. Using this Card, please tell me the extent to which you agree or disagree with each statement. (READ OUT – ROTATE ORDER OF STATEMENTS - *START)						
	Agree Strongly	Agree Somewhat	Neither/ Nor	Disagree Somewhat	Disagree Strongly	Don't Know
1. Dairy foods contain a very wide range of vitamins and minerals	1	2	3	4	5	6
2. The vitamins and minerals in dairy food occur naturally	1	2	3	4	5	6
3. Dairy foods are essential for my own health and well being	1	2	3	4	5	6
4. If you don't want to consume dairy foods you can easily get the vitamins and minerals they contain from other sources	1	2	3	4	5	6
5. I'd be very reluctant to cut down on dairy foods	1	2	3	4	5	6
6. If I don't consume dairy foods it will be detrimental to my health	1	2	3	4	5	6
7. Dairy foods are essential for the growth and development of my children	1	2	3	4	5	6
8. I'd be very reluctant to cut down the amount of dairy food my children consume	1	2	3	4	5	6
9. All dairy foods are fattening	1	2	3	4	5	6

Q7a. **ASK ALL :**

What particular vitamins, minerals or nutrients are contained in dairy foods?

(PROBE : WHAT OTHERS) DO NOT PROMPT

Calcium.....	01
Vitamin A	02
Riboflavin.....	03
Magnesium	04
Potassium	05
Phosphorous	06
B Vitamins.....	07
Zinc	08
Protein	09
Other (specify).....	
.....	
Don't know	10

b. What would you say are the main health benefits provided by the various vitamins, minerals and nutrients in dairy foods as far as adults are concerned?

(PROBE : WHAT OTHERS) DO NOT PROMPT

Strong teeth/bones	01
Prevents Osteoporosis.....	02
Helps provide a healthy immune system	03
Helps growth and development.....	04
Helps learning	05
Helps provide healthy skin.....	06
Helps provide healthy eyes.....	07
Providing energy	08
Good for general health and well-being	09
Healthy hair	10
Other (specify).....	
.....	
None.....	11
Can't say	12

<p>Q7c. What would you say are the main health benefits provided by the various vitamins, minerals and nutrients in dairy foods as far as younger children are concerned?</p> <p>(PROBE : WHAT OTHERS) DO NOT PROMPT</p>	Strong teeth/bones	01
	Prevents Osteoporosis.....	02
	Helps provide a healthy immune system	03
	Helps growth and development.....	04
	Helps learning	05
	Helps provide healthy skin.....	06
	Helps provide healthy eyes.....	07
	Providing energy	08
	Good for general health and well-being	09
	Healthy hair	10
	Other (specify).....	
	None.....	11
Can't say	12	

<p>Q8. SHOW CARD 9</p> <p>What statement on the card best describes your view on the following...?</p>						
	I definitely know it's true	I think it might be true	I'm not really sure	I think it's false	I know it's false	Don't Know
1. Dairy foods help to develop the immune system in young children	1	2	3	4	5	6
2. Dairy foods help develop strong teeth and bones in young children	1	2	3	4	5	6
3. Dairy foods help young children when it comes to concentration and learning	1	2	3	4	5	6
4. Dairy foods improve people's hearing	1	2	3	4	5	6
5. Dairy foods help the growth and development of young children	1	2	3	4	5	6
6. Dairy foods help give adults healthy skin and eyes	1	2	3	4	5	6
7. Dairy foods help the adults' immune system	1	2	3	4	5	6
8. Dairy foods help strengthen the bones of adults	1	2	3	4	5	6
9. Dairy foods give adults energy	1	2	3	4	5	6
10. Dairy foods help give adults healthy hair	1	2	3	4	5	6
11. Calcium in dairy foods is better absorbed by the body than calcium from other food or drink sources	1	2	3	4	5	6
12. Dairy foods give children energy	1	2	3	4	5	6

Q9. SHOW CARD 10				
a. Which of these foods do you ever personally consume?				
b. FOR EACH IN Q9a ASK: Which of these foods do you personally consume at least twice a week?				
c. Which of these foods do your children ever consume?				
d. FOR EACH IN Q9c ASK: Which of these foods do your children consume at least twice a week?				
	a. Ever Personally	b. Personally Twice a Week	c. Ever Children	d. Children Twice a Week
Regular milk.....	01	01	01	01
Reduced fat milk.....	02	02	02	02
Low fat milk.....	03	03	03	03
Regular soy milk.....	04	04	04	04
Reduced fat soy milk	05	05	05	05
Regular yogurt.....	06	06	06	06
Low fat yogurt	07	07	07	07
No fat yogurt	08	08	08	08
Regular tasty cheese.....	09	09	09	09
Low fat cheese.....	10	10	10	10
Dairy spreads or butter blends	11	11	11	11
Ice cream.....	12	12	12	12
Butter	13	13	13	13
Cream	14	14	14	14

Q9e. To the best of your knowledge, what is the percentage of fat in... (ENCOURAGE AN ESTIMATE)		
1. Regular milk	<input type="text"/> %	Don't know.....101
2. Reduced fat milk	<input type="text"/> %	Don't know.....101
3. Low fat milk	<input type="text"/> %	Don't know.....101
4. Regular soy milk	<input type="text"/> %	Don't know.....101
5. Reduced fat soy milk	<input type="text"/> %	Don't know.....101
6. Regular yogurt	<input type="text"/> %	Don't know.....101
7. Low fat yogurt	<input type="text"/> %	Don't know.....101
8. Regular tasty cheese	<input type="text"/> %	Don't know.....101
9. Low fat cheese	<input type="text"/> %	Don't know.....101
10. Dairy spreads or butter blends	<input type="text"/> %	Don't know.....101
11. Ice cream	<input type="text"/> %	Don't know.....101
12. Butter	<input type="text"/> %	Don't know.....101
13. Cream	<input type="text"/> %	Don't know.....101

Q9f. SHOW CARD 11 Would you describe the following as very fattening, fairly fattening, not too fattening or not at all fattening in terms of affecting your weight?								
g. IF CODE '1' OR '2' IN Q9f Do you avoid this product as a result of thinking that it is fattening? REPEAT f and g FOR EACH PRODUCT								
		f.					g.	
		Very Fattening	Fairly Fattening	Not too Fattening	Not at all Fattening	Don't know	Yes	No
1.	Regular milk	1	2	3	4	5	1	2
2.	Reduced fat milk	1	2	3	4	5	1	2
3.	Low fat milk	1	2	3	4	5	1	2
4.	Regular soy milk	1	2	3	4	5	1	2
5.	Reduced fat soy milk	1	2	3	4	5	1	2
6.	Regular yogurt	1	2	3	4	5	1	2
7.	Low fat yogurt	1	2	3	4	5	1	2
8.	No fat yogurt	1	2	3	4	5	1	2
9.	Regular tasty cheese	1	2	3	4	5	1	2
10.	Low fat cheese	1	2	3	4	5	1	2
11.	Dairy spreads or butter blends	1	2	3	4	5	1	2
12.	Ice cream	1	2	3	4	5	1	2
13.	Butter	1	2	3	4	5	1	2
14.	Cream	1	2	3	4	5	1	2

**SECTION 5:
PERSONAL BEHAVIOUR**

Q10. SHOW CARD 12 Which of these statements best describes your personal approach to dairy food consumption?	I avoid dairy foods completely1 I try to limit my consumption of dairy food.....2 I don't pay any attention to my dairy food consumption3 I try to make sure I consume enough dairy foods4 Don't know5
---	--

Q11a. ASK ALL Some people say that a certain number of serves of dairy food are required as part of a healthy diet. What would you believe a 'serve of dairy food' is? Can you give me some examples? (PROBE : WHAT OTHER EXAMPLES) (RECORD EXACT RESPONSE)	A glass of milk1 A tub of yoghurt2 A slice of cheese3 Two slices of cheese.....4 A piece of cheese5 A latte/cappuccino6 Other (specify exact response) Don't know7
---	--

Q11b. How many serves of dairy food per day do you believe is a healthy target for adults like you ? IFASKED... A serve is a glass of milk or a piece of cheese or a tub of yoghurt.	(Go to Q12)	None.....	1
	(Ask c)	One	2
	(Ask c)	Two	3
	(Ask c)	Three.....	4
	(Ask c)	Four or more	5
	(Go to Q12)	Don't know	6

c. Where did you learn about the number of serves of dairy food required for adults?	Family.....	01
	Friends.....	02
	TV advertising	03
	Magazine/press advertising	04
	Supermarket advertising	05
	Articles in magazines/press	06
	Health professionals/Doctor etc.	07
	School	08
	Information on cereal box	09
	Information on dairy products	10
	Other (specify).....	
.....		
Can't recall/always knew etc.....	11	

d. Which of the following statements best describes the extent to which you try to achieve that target?	I make a determined effort to consume that amount	1
	I make some effort	2
	I don't worry about it that much.....	3
	I don't worry about it at all.....	4
	Don't know	5

e. Which of these statements best describes how difficult it is to reach the total of these serves?	It's not difficult at all.....	1
	It requires a bit of effort	2
	It's reasonably difficult.....	3
	It's very difficult.....	4

Q12. And, overall, do you believe that you ought to be consuming...	More dairy foods than you do now	1
	Less dairy foods	2
	About the same amount	3

**SECTION 6:
BEHAVIOUR WITH RESPECT TO CHILDREN UNDER 13**

Q13. Thinking about your children under 13, do you...	Ensure that they avoid dairy foods completely.....	1
	Try to restrict their consumption	2
	Don't really pay any attention to their consumption	3
	Try to make sure they consume enough	4
	Don't know	5

Q14a. How many serves of dairy food per day do you believe is a healthy target for children under 13?	(Go to Q15) None.....	1
	(Ask b) One	2
	(Ask b) Two	3
	(Ask b) Three.....	4
	(Ask b) Four or more	5
	(Go to Q15) Don't know	6

b. Which of the following statements best describes the extent to which you try to achieve that target for your children?	I make a determined effort to see that they consume that amount	1
	I make some effort	2
	I don't worry about it that much.....	3
	I don't worry about it at all.....	4
	Don't know	5

c. Which of these statements best describes how difficult it is to reach the total of these serves for your children under 13?	It's not difficult at all.....	1
	It requires a bit of effort	2
	It's reasonably difficult.....	3
	It's very difficult.....	4

Q15. And, overall, do you believe that your children ought to be consuming...	More dairy foods than they do now	1
	Less dairy foods	2
	About the same amount	3

**SECTION 7:
ADVERTISING RECALL**

Q16a. What particular advertising slogan or sign-off line, if any, do you associate with dairy foods in general? I'm not talking about advertising for particular brands of milk, butter or cheese but advertising for dairy foods in general. (DO NOT AID)	(Go to Q16c)	Food of Life/Food for Life	1
	(Continue)	Dairy Good	2
	(Continue)	3 Serves a Day	3
	(Continue)	Other (write in)	4
	(Continue)	None/don't know	5

b. The slogan is "Dairy – the Food of Life". Can you recall seeing or hearing this line?	(Continue)	Yes	1
	(Go to Q17a)	No	2
	(Go to Q17a)	Can't say	3

c. Do you think that "Dairy – the Food of Life" is a very good, good, fair, poor or very poor way of describing dairy food?	Very good.....	1
	Good.....	2
	Fair	3
	Poor	4
	Very poor.....	5
	Don't know/can't say.....	6

TV ADVERTISING		
ROTATION	JKL.....	①
	LJK.....	2
	KLJ.....	3

①

SHOW STILLS FOR AD J (3 Serves Kids)

Q17a. Do you recall seeing this ad on TV?	(Continue)	Yes	1
	(Go to Next Page)	No	2

<p>b. SHOW CARD 13</p> <p>Which of these words or phrases do you think apply to this ad – you may say as many or as few of them as you like. (MULTIPLE RESPONSE)</p>	The claims made in the ad are believable	1
	Told me something I didn't know	2
	It was an ad that grabbed my attention	3
	It was an ad which I would enjoy watching again.....	4
	It was quite different to advertising for other types of food...	5
	It is easy to understand	6
	It is aimed at people like me	7
	(None of these).....	8

<p>c. Do you think this ad makes you personally likely to...? (READ OUT)</p>	Consume more dairy foods	1
	Consume less dairy foods	2
	Makes no real difference	3

<p>d. And how does this ad effect your view towards your children's consumption of dairy foods – will you try to make them...? (READ OUT)</p>	Consume more dairy foods	1
	Consume less dairy foods	2
	Makes no real difference how much dairy food you will encourage your children to consume	3

②

SHOW STILLS FOR AD K (Kids Nutrients)

Q17a. Do you recall seeing this ad on TV?	(Continue)	Yes1
	(Go to Next Page)	No2

b. **SHOW CARD 13**

Which of these words or phrases do you think apply to this ad – you may say as many or as few of them as you like. **(MULTIPLE RESPONSE)**

The claims made in the ad are believable1
Told me something I didn't know2
It was an ad that grabbed my attention3
It was an ad which I would enjoy watching again.....4
It was quite different to advertising for other types of food...5
It is easy to understand6
It is aimed at people like me7
(None of these).....8

c. Do you think this ad makes you personally likely to...? **(READ OUT)**

Consume more dairy foods1
Consume less dairy foods2
Makes no real difference3

d. And how does this ad effect your view towards your children's consumption of dairy foods – will you try to make them...? **(READ OUT)**

Consume more dairy foods1
Consume less dairy foods2
Makes no real difference how much dairy food you will encourage your children to consume3

SHOW STILLS FOR AD L (Mum Bath)

Q17a. Do you recall seeing this ad on TV?	(Continue)	Yes	1
	(Go to Next Page)	No.....	2

b. SHOW CARD 13 Which of these words or phrases do you think apply to this ad – you may say as many or as few of them as you like. (MULTIPLE RESPONSE)	The claims made in the ad are believable	1
	Told me something I didn't know	2
	It was an ad that grabbed my attention	3
	It was an ad which I would enjoy watching again.....	4
	It was quite different to advertising for other types of food...	5
	It is easy to understand	6
	It is aimed at people like me	7
	(None of these).....	8

c. Do you think this ad makes you personally likely to...? (READ OUT)	Consume more dairy foods	1
	Consume less dairy foods	2
	Makes no real difference	3

d. And how does this ad affect your view towards your children's consumption of dairy foods – will you try to make them...? (READ OUT)	Consume more dairy foods	1
	Consume less dairy foods	2
	Makes no real difference how much dairy food you will encourage your children to consume	3

**SECTION 8:
LOGOS**

LOGO ADVERTISING	
ROTATION	XZ ①
	ZX 2

①

SHOW THREE SERVES EVERY DAY LOGO (X)

Q18a. Have you seen this symbol before today?	(Continue)	Yes 1
	(Go to next page)	No 2

b. And would seeing this symbol...	Make you consider increasing your consumption of dairy foods like milk, cheese and yoghurt 1
	Make you consider decreasing your consumption of dairy foods like milk, cheese and yoghurt 2
	Make no difference 3
	Don't know 4

SHOW AUSTRALIAN GRAND DAIRY AWARDS LOGO (Z)

Q18a. Have you seen this logo on dairy foods before? (Continue)	Yes.....1	No2
(Go to next page)		

b. If you see this symbol on a dairy product what would it mean to you? DO NOT AID – RECORD FIRST MENTION SEPARATELY		
	First Mention	All Others
Low cholesterol.....	01	01
Low fat/light	02	02
Good for you.....	03	03
Good for your heart	04	04
Nutritious/healthy	05	05
Natural/pure.....	06	06
Energy/vitality	07	07
Strong bones	08	08
Great taste/full rich flavour.....	09	09
Australian made/owned	10	10
Won a prize	11	11
Premium quality	12	12
Farm fresh.....	13	13
Marketing gimmick	14	14
Other (specify)	15	15
Nothing/don't know.....	16	16

**SECTION 9:
CLASSIFICATION**

FINALLY, A FEW QUESTIONS TO HELP US CLASSIFY YOURS ANSWERS

<p>Q19. SHOW CARD 14</p> <p>Which of these describes your occupation?</p>	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding-left: 20px;">Working full time</td> <td style="text-align: right; padding-right: 10px;">1</td> </tr> <tr> <td style="padding-left: 20px;">Working part time</td> <td style="text-align: right; padding-right: 10px;">2</td> </tr> <tr> <td style="padding-left: 20px;">Unemployed, seeking work.....</td> <td style="text-align: right; padding-right: 10px;">3</td> </tr> <tr> <td style="padding-left: 20px;">Looking after the home.....</td> <td style="text-align: right; padding-right: 10px;">4</td> </tr> <tr> <td style="padding-left: 20px;">Studying full time</td> <td style="text-align: right; padding-right: 10px;">5</td> </tr> <tr> <td style="padding-left: 20px;">Retired</td> <td style="text-align: right; padding-right: 10px;">6</td> </tr> </table>	Working full time	1	Working part time	2	Unemployed, seeking work.....	3	Looking after the home.....	4	Studying full time	5	Retired	6
Working full time	1												
Working part time	2												
Unemployed, seeking work.....	3												
Looking after the home.....	4												
Studying full time	5												
Retired	6												

<p>Q20. Are you the main income earner for this household?</p>	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding-left: 20px;">Yes</td> <td style="text-align: right; padding-right: 10px;">1</td> </tr> <tr> <td style="padding-left: 20px;">No</td> <td style="text-align: right; padding-right: 10px;">2</td> </tr> </table>	Yes	1	No	2
Yes	1				
No	2				

<p>Q21. What is the occupation of the main income earner?</p>	

<p>Q22. SHOW CARD 15</p> <p>What would be your total household income before tax – please just tell me the letter on this card next to the amount which applies?</p>	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding-left: 20px;">F.....</td> <td style="text-align: right; padding-right: 10px;">1</td> </tr> <tr> <td style="padding-left: 20px;">K</td> <td style="text-align: right; padding-right: 10px;">2</td> </tr> <tr> <td style="padding-left: 20px;">R</td> <td style="text-align: right; padding-right: 10px;">3</td> </tr> <tr> <td style="padding-left: 20px;">L.....</td> <td style="text-align: right; padding-right: 10px;">4</td> </tr> <tr> <td style="padding-left: 20px;">D.....</td> <td style="text-align: right; padding-right: 10px;">5</td> </tr> </table>	F.....	1	K	2	R	3	L.....	4	D.....	5
F.....	1										
K	2										
R	3										
L.....	4										
D.....	5										

Thank you. That is the end of the interview. Once again my name is (... ..) from Sweeney Research. Should you need to contact us again please call us on 1800 35 77 39.

The study has been conducted on behalf of Dairy Australia.

As part of quality control procedures, someone from our project team may wish to re-contact you to ask a couple of questions, validating the information we have collected.

As a market research company we comply with the requirements of the Privacy Act. The information you have provided will be used only for market research purposes.

Would you like me to give you any more details about how we comply?

IF YES THEN SAY...

As I mentioned we may contact you to verify some of the information you gave us. Once we have completed our validation and processing of information, please be assured that your name and contact details will be removed from your responses to this survey. After that time we will no longer be able to identify the responses provided by you. However for the period of time that your name and contact details remain with your survey responses, which will be approximately six weeks you can contact us to request access to your information and/or ask us to delete some or all of your information.

Once again, thank you for your time. My name is and I'm calling from Sweeney Research. If you have any queries, you can call the Market Research Society's Survey Line on 1300 364 830 (for the cost of a local call).

HAND OVER PRIVACY BROCHURE

Date of interview:

Respondent's name:

Phone number:

Address (if applicable):

"I certify that this is a true, accurate and complete interview, conducted in accordance with the IQCA standards and the MRSA Code of Professional Behaviour (ICC/ESOMAR). I will not disclose to any other person the content of this questionnaire or any other information relating to this project."

Signed:

Interviewer:

Card 1

- 1 Under 18
- 2 18 – 19
- 3 20 – 24
- 4 25 – 29
- 5 30 – 34
- 6 35 – 39
- 7 40 or over

Card 2

- 5 Agree strongly
- 4 Agree somewhat
- 3 Neither/nor
- 2 Disagree somewhat
- 1 Disagree strongly

Card 3

- 1 Essential
- 2 Extremely important
- 3 Very important
- 4 Quite important
- 5 A little bit important
- 6 Not too important
- 7 Not important at all
- 8 Don't know

Card 4

- 1 Provide a very wide variety of essential vitamins, minerals and nutrients
- 2 Provide a fairly wide variety of essential vitamins, minerals and nutrients
- 3 Provide just one or two essential vitamins, minerals and nutrients
- 4 Don't really provide any vitamins, minerals or nutrients at all

Card 5

- 1 Red meat such as beef or lamb
- 2 Dairy products such as milk, cheese or yoghurt
- 3 Fruit and vegetables
- 4 Soy products such as soy milk, soy spread or soy yoghurt

Card 6

- 1 The claims made in the ad are believable
- 2 Told me something I didn't know
- 3 It was an ad that grabbed my attention
- 4 It was an ad which I would enjoy watching again
- 5 It was quite different to advertising for other types of food
- 6 It is easy to understand
- 7 It is aimed at people like me
- 8 None of these

Card 7

- 1 Meat, fish, poultry and eggs
- 2 Dairy products such as milk, cheese or yogurt
- 3 Fruit and vegetables
- 4 Bread, cereals, rice and pasta
- 5 None of these

Card 8

- 1 Agree strongly
- 2 Agree somewhat
- 3 Neither/nor
- 4 Disagree somewhat
- 5 Disagree strongly

Card 9

- 1 I definitely know it's true
- 2 I think it might be true
- 3 I'm not really sure
- 4 I think it's false
- 5 I know it's false

Card 10

- 1 Regular milk
- 2 Reduced fat milk
- 3 Low fat milk
- 4 Regular soy milk
- 5 Reduced fat soy milk
- 6 Regular yogurt
- 7 Low fat yogurt
- 8 No fat yogurt
- 9 Regular tasty cheese
- 10 Low fat cheese
- 11 Dairy spreads or butter blends
- 12 Ice cream
- 13 Butter
- 14 Cream

Card 11

- 1 Very fattening
- 2 Fairly fattening
- 3 Not too fattening
- 4 Not at all fattening
- 5 Don't know

Card 12

- 1 I avoid dairy foods completely
- 2 I try to limit my consumption of dairy food
- 3 I don't pay any attention to my dairy food consumption
- 4 I try to make sure I consume enough dairy foods

Card 13

- 1 The claims made in the ad are believable
- 2 Told me something I didn't know
- 3 It was ad that grabbed my attention
- 4 It was an ad which I would enjoy watching again
- 5 It was quite different to advertising for other types of food
- 6 It is easy to understand
- 7 It is aimed at people like me
- 8 None of these

Card 14

- 1 Working full time
- 2 Working part time
- 3 Unemployed, seeking work
- 4 Looking after the home
- 5 Studying full time
- 6 Retired

Card 15

- 1 F – Up to \$30,000 pa
- 2 K - \$31,000 to \$50,000 pa
- 3 R - \$51,000 to \$75,000 pa
- 4 L – Over \$75,000 pa
- 5 D – Prefer not to answer



X





kids need 3 serves of dairy every day
glass of milk
piece of cheese
tub of yogurt

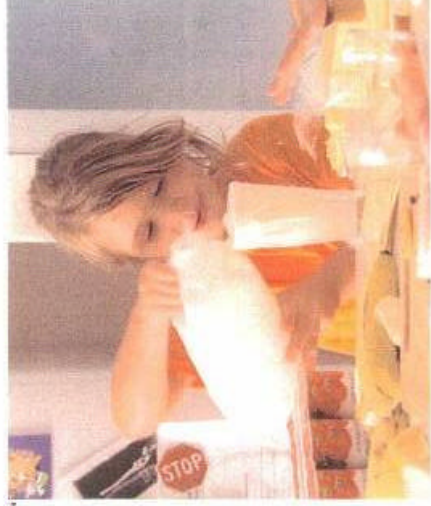


4

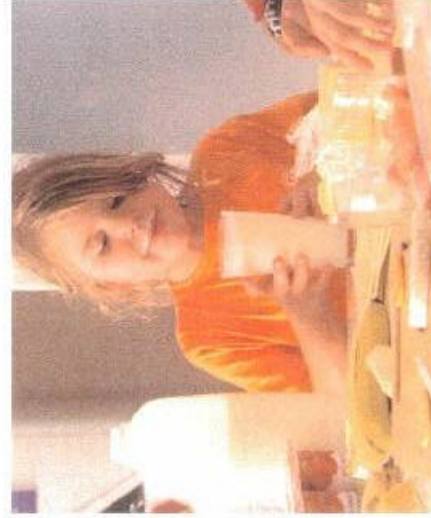


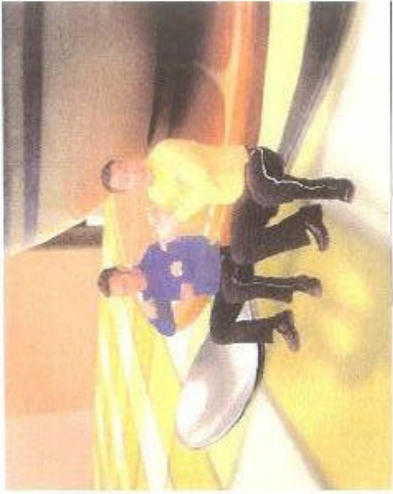
L

V



she needs
B vitamins and carbohydrate
to assist learning.





A

APPENDIX 2: Sample Composition

2004 Food of Life Post Campaign Tracking Research Wave 2

	February 2003 Benchmark	April 2003 Interim Wave 2	June 2003 Wave 3	January 2004 Wave 1	April 2004 Wave 2
Total	200	200	200	200	200
	%	%	%	%	%
Work Status:					
Working full time	20	23	20	16	11
Working part time	28	29	27	34	38
Unemployed	3	2	2	2	1
Home duties	47	44	50	49	51
Studying full time	3	3	3	-	1
Retired	-	1	1	1	-
Socio-economic:					
Upper white collar	7	3	4	4	7
Lower white collar	44	36	42	40	45
Upper blue collar	19	21	20	32	20
Lower blue collar	19	21	18	14	19
NIW	8	10	13	11	8
Refused	4	11	4	1	3
Household Income:					
Up to \$30,000	17	19	16	20	12
\$31,000-\$50,000	30	21	25	28	25
\$51,000-\$75,000	29	17	19	20	22
\$75,000+	13	15	19	20	22
Refused	12	29	22	12	20
Age in Detail (Quota):					
18-29	38	38	35	34	33
30-34	31	28	33	33	32
35-39	32	35	32	33	35
Age of Youngest Child:					
Up to 6	75	63	74	69	73
7 plus	25	37	26	31	27

Sweeney Research

