

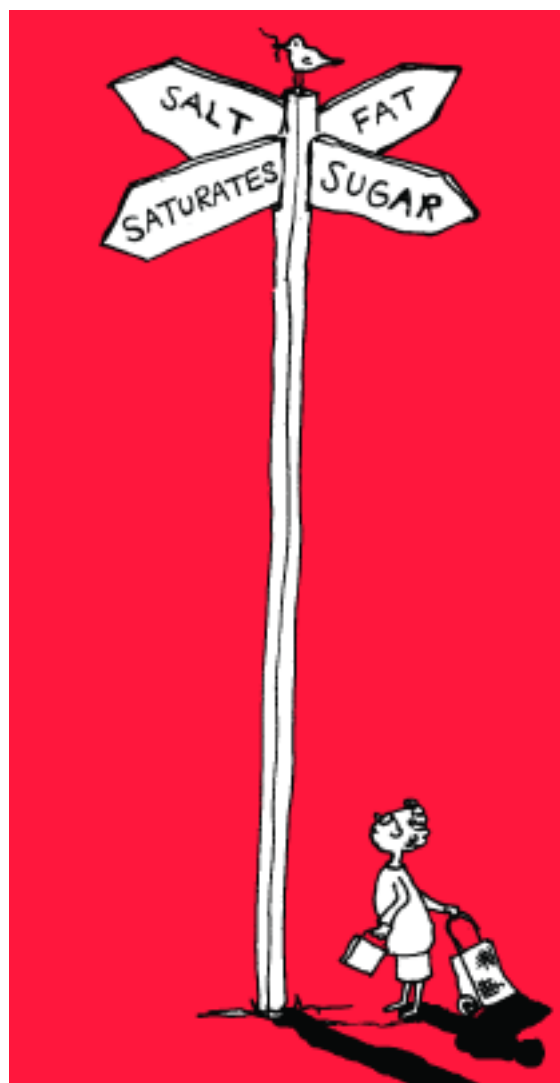
HEALTHY SIGNS?

July 2006

CAMPAIGN REPORT

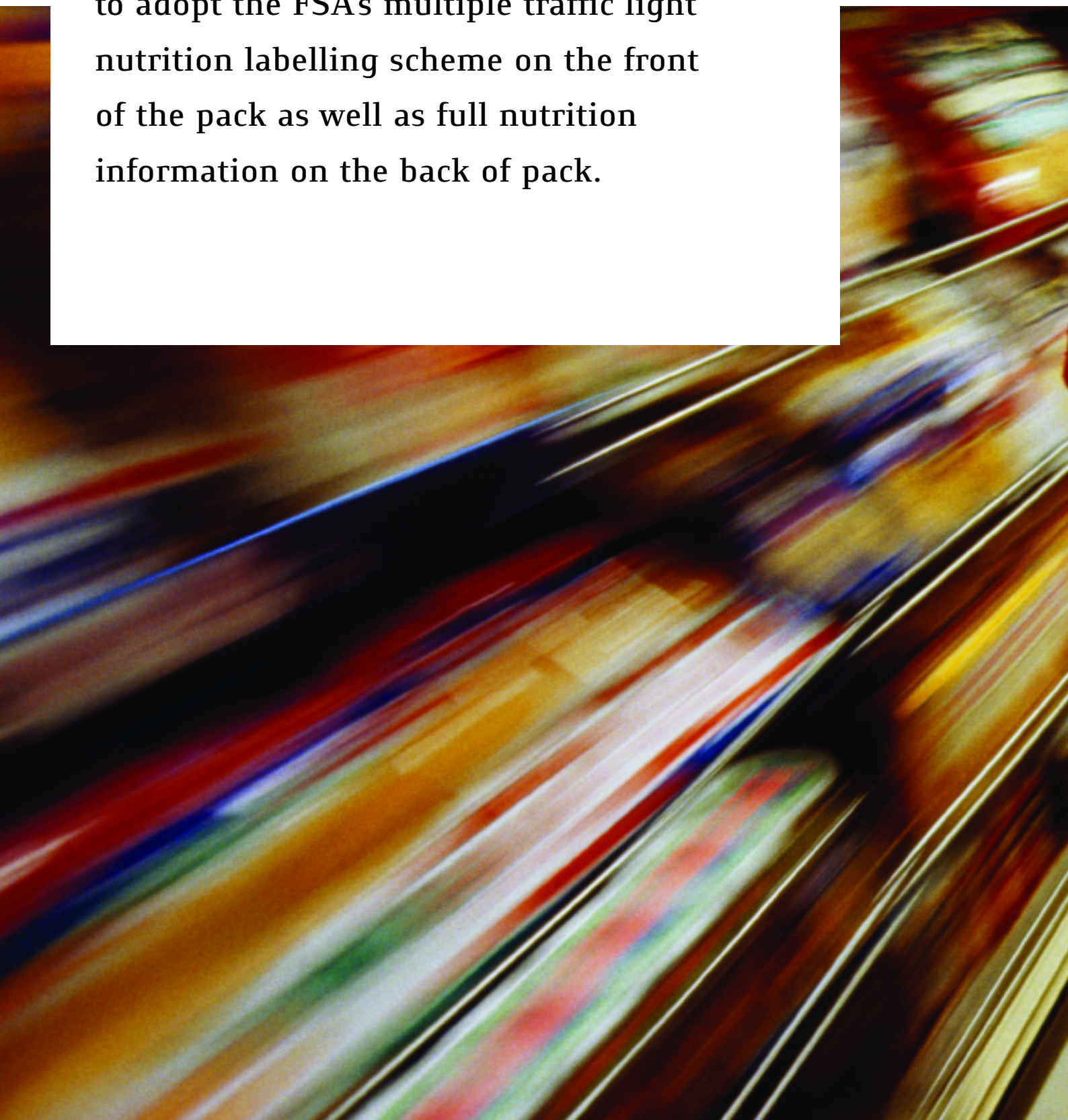
which
?

It can be difficult to work out how much fat, sugar and salt different foods contain – but these are the nutrients that are of most public health significance given high death rates from cancer and heart disease and rising rates of obesity. Many of us shop in a hurry and don't have time to examine the nutrition information panel in much detail. And with greater reliance on processed foods it can be difficult to tell easily which products are healthier and which aren't. New Which? research confirms that multiple traffic light labelling is the most useful system for consumers. Retailers and manufacturers must adopt this labelling scheme on the front of the pack as well as full nutrition information on the back of the pack.



for all consumers

Which? wants retailers and manufacturers to adopt the FSA's multiple traffic light nutrition labelling scheme on the front of the pack as well as full nutrition information on the back of pack.



WHICH? RESEARCH

Several food manufacturers and retailers have announced plans to introduce simplified front-of-pack nutrition labelling. Which? research comparing four nutrition labelling schemes has found that traffic light labelling is the most useful system for consumers. This reinforces the findings of Food Standards Agency (FSA) research.

The scheme currently being used by Tesco came out as the weakest in the Which? research. Despite this, a new Which? food industry survey has found that several manufacturers and some retailers intend to use this scheme or one similar to it. Encouragingly, four retailers (Asda, the Co-operative Group, Sainsbury's and Waitrose) have said they are using, or intend to use, traffic light labelling as proposed by the FSA. Marks and Spencer has also told us that it is intending initially to put traffic light labelling on the back of its packaging.

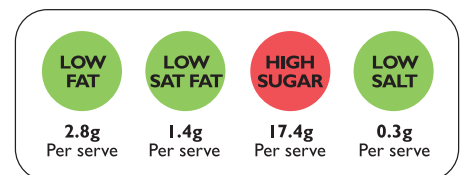
Which? is calling for all manufacturers and retailers to follow their example and use multiple traffic light labelling, rather than opting for schemes that may show their products in a more positive light but which are not so helpful.

Which? presented four labelling formats to more than 600 consumers:

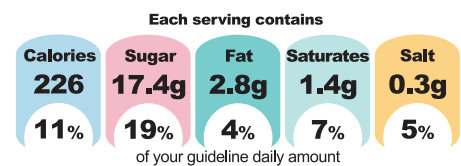
- › the FSA's traffic light labelling proposal
- › Tesco's scheme
- › a variation of the Tesco scheme being adopted by some food manufacturers
- › Tesco's scheme with traffic lights applied.

The different schemes mocked up and presented in the research

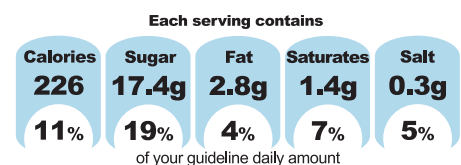
FSA



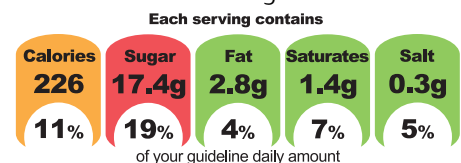
Tesco



Other Manufacturers



Tesco with traffic lights



KEY FINDINGS

- The FSA's traffic light labelling scheme came out as the best system throughout our test. Consumers were able to use the information correctly and it was easy to understand and quick to use.
- The FSA scheme not only came out well overall, it also performed well for people in lower socio-economic groups and people who would not normally use food labels.
- The current Tesco system was the weakest scheme. Although it helped many people to compare between products, the number of people able to compare products correctly was significantly lower than the FSA scheme. It also wasn't as quick to use. People from lower socio-economic groups particularly struggled to compare between products using the Tesco labelling scheme.

“The red for the high salt - it grabs you straight away. Orange close to red showing you it's medium. The colours fit it properly. Its clearer to see”

Woman, Tamworth

- The Tesco system performed poorly for two main reasons: only a minority had a very good understanding of how to use the guideline daily amount (GDA) information on which it is based [see page 7]; and the Tesco colour-coding of nutrients was confusing, with only a minority of consumers correctly identifying what the colours used meant.
- The scheme being used by some food manufacturers (the Tesco scheme without any colours) and the Tesco scheme with traffic lights applied performed very similarly – doing slightly better than the Tesco scheme, but all three GDA-based schemes did less well than the FSA one.

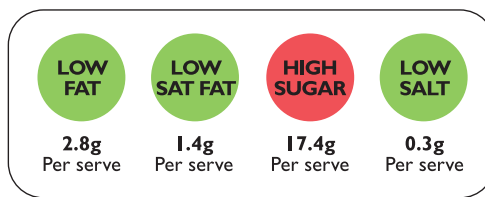
BACKGROUND

Over the last two years the FSA has carried out extensive research to find out which front-of-pack labelling system helps consumers to understand at a glance which foods can make a positive contribution to a healthy diet and which should be eaten only in moderation or sparingly.

This included testing four sign-posting models with 2676 consumers: a single traffic light, a multiple traffic light, a colour coded guideline daily amount (GDA) based system and a black and white GDA based system. The multiple traffic light (MTL), using red, amber and green to indicate whether a product is high, medium or low in key nutrients, was well liked and performed best, particularly in identifying quickly the key nutritional characteristics of a single food. The colour-coded GDA also performed well, particularly when comparing two foods, and it was most liked by consumers. But while the information on nutrient levels was helpful for product comparisons, in practice consumers had some difficulty in using the GDA information.

Based on its research, the FSA Board has therefore recommended that front-of-pack labelling schemes should:

- provide separate information on fat, saturated fat, sugar and salt
- use red, amber or green colour coding to indicate whether levels of these nutrients are high, medium or low
- use nutritional criteria developed by the FSA to determine the colour code
- give information on the levels of nutrients per portion of product.



The FSA has recommended that initially the scheme should be used on ready meals, breakfast cereals, pizzas, sandwiches and foods such as burgers, sausages, pies, breaded, coated or formed meat, meat alternative, poultry and fish products. Which? would like to see the scheme applied across a broader range of foods.

“The colour labels makes it easier to see”

Man, Tamworth - talking about the multiple traffic light scheme

FACT:

Around a quarter of the population is obese

FACT:

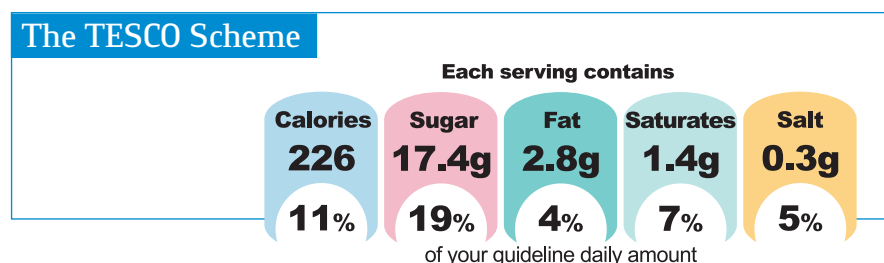
The UK has the second highest proportion of obese adults in the EU

A VOLUNTARY SCHEME

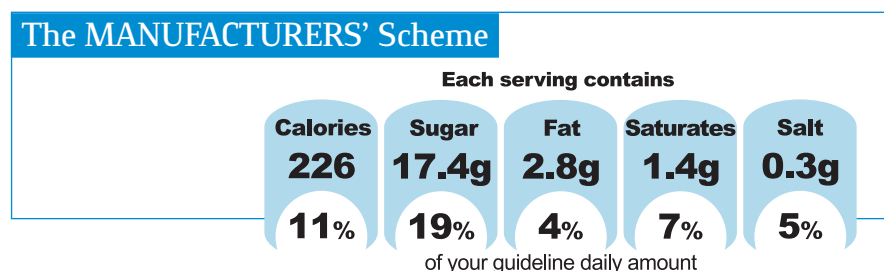
The FSA does not have the powers to legislate, but instead can only encourage manufacturers and retailers to use its scheme. This is because food labelling legislation is decided by the European Union. The nutrition labelling directive is under review providing an opportunity to try and agree an EU-wide scheme. In the meantime, we are reliant on the food industry acting responsibly and adopting the scheme that works best for consumers. Unfortunately several companies have decided not to.

Four retailers have so far publicly stated that they intend to base their labelling on the FSA's principles: Asda, the Co-operative Group, Sainsbury's and Waitrose.

Tesco pre-empted the FSA research by instead opting for a GDA-based scheme with different colour coding. Under the Tesco scheme green indicates fat, lighter green indicates saturates, pink indicates sugar, yellow indicates salt and blue indicates calories. This differs from the FSA's colours which indicate the levels of the nutrients present in the food. Unlike the FSA scheme, the Tesco colours do not change according to whether the food is high, medium or low in the nutrients.



Several manufacturers (Danone, Kellogg's, Kraft, Nestlé and Pepsico) announced ahead of the FSA Board's conclusions that they would be presenting information in the same way as Tesco but without using its colour coding.



GUIDELINE DAILY AMOUNTS, TRAFFIC LIGHTS AND DIETARY GOALS

Guideline daily amounts (GDAs) are a rough guide to the nutrient levels we should eat in a day. Individual requirements may be different, but GDAs generalise across the population for men and for women. They are derived from population dietary goals set by the Government's expert scientific committee on nutrition. Several retailers and manufacturers indicate GDAs on the back of pack along with nutrition information. Some are now basing front of pack schemes on GDAs. The Tesco scheme, for example, shows nutrition information on the front of products as a percentage of the GDA.

“Not really very clear, the percentages & all the different colours”

The criteria the FSA has proposed for traffic lights also relate to these dietary goals and to GDAs. But they interpret what nutrient levels in a product mean compared against these goals by using red, amber and green to show whether the level is high, medium or low.

Woman talking about the Tesco scheme, Croydon

The GDAs that food manufacturers and retailers are using were developed by the Institute of Grocery Distribution (IGD), an industry body. However, in developing its sign-posting scheme, the FSA has proposed a stricter level for sugar than the IGD based on advice from an expert advisory group.

LATEST WHICH? RESEARCH

Which? wants sign-post labelling to be based on consumer research to ensure the format used is the one most helpful to consumers and to be applied consistently by all retailers and manufacturers. Sign-post labelling should be simple and make healthier choices easier. A range of different labelling schemes will add to consumer confusion and make healthier choices more difficult. We have therefore supported the scheme that research has shown to be most useful to consumers: multiple traffic lights.

As Tesco, and the manufacturers that are using a similar scheme, have claimed their schemes are more helpful to consumers, we decided to test them along-side the FSA scheme. Although

the FSA research did compare a colour-coded GDA system, this was a different design to the Tesco scheme. We wanted to see how the Tesco scheme and the food manufacturers' scheme compared to the FSA recommended one. We also decided to add traffic light colours to the Tesco scheme to see if this was a possible way forward and a compromise between the different types of schemes being used. Asda has also indicated that it intends to use a similar scheme to this.



“Colour blue doesn't
mean anything - traffic lights
would be better”

Woman, Weston-super-Mare

OUR METHODOLOGY

FSA



Tesco



Other manufacturers



Tesco with traffic lights



Which? interviewed 636 people face to face. Each person was asked to rate just one scheme in detail. Therefore over 150 people were asked about each of the four schemes.

The different labelling scheme was presented to them on a healthier and less healthy version of the following products: a breakfast cereal, a pasta sauce and a ready meal.

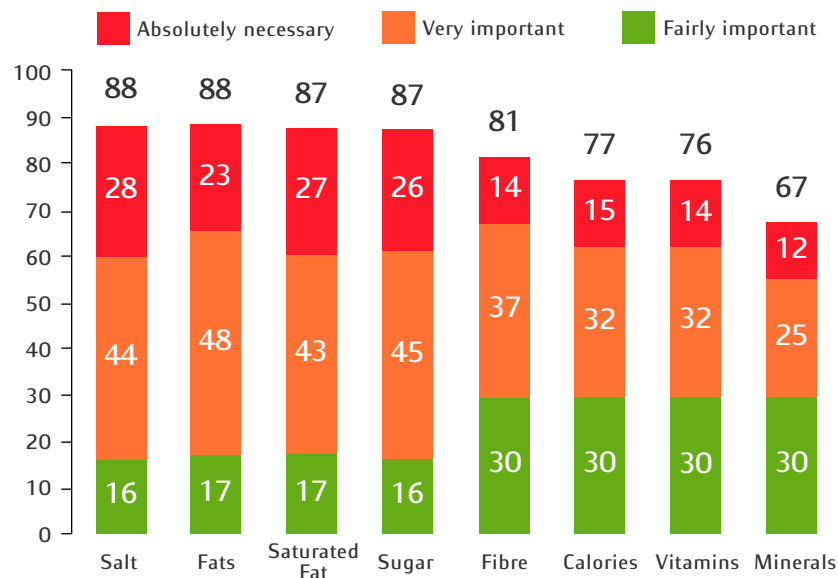
The people we spoke to were representative of shoppers in Great Britain and were aged between 18 and 65. We also included a boost sample of people from lower socio-economic groups (social grades D and E), because these groups generally have less healthy diets and are usually more at risk from diet-related disease. When applying traffic light colours, we used the FSA's

draft nutrition criteria. These do not apply to calories, but calories are included in the Tesco scheme. When we applied colour-coding to the Tesco scheme, we based the levels for red, amber and green on the same principles as the FSA criteria for fat, saturates, sugar and salt.

USE OF LABELS

- One in four people we interviewed said they found nutrition labelling difficult to understand, but it was more of a problem for people from lower socio-economic groups. The nutrients that people thought were most important to have on front of pack were salt, fat, saturated fat and sugar.
- Two thirds of the people we spoke to said that they had heard of GDAs, but only one in five actively used them. Younger people, women and those on higher incomes were most likely to say they had a very or fairly good understanding of GDAs.

IMPORTANCE OF HAVING INFORMATION ABOUT NUTRIENTS ON THE FRONT OF PACK



Base 636

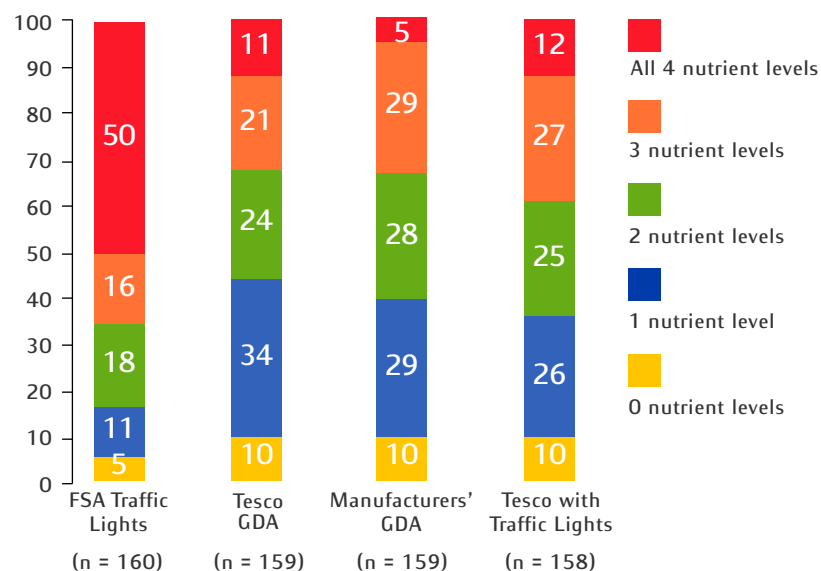
To ensure a comprehensive evaluation of the four labelling schemes we used a market research methodology known as a four-cell monadic test.

The research took place in Tamworth, Birmingham, Chester, Croydon and Weston-super-Mare between 28th April and 5th May 2006.

HOW THE FOUR SCHEMES COMPARED

The FSA scheme enabled people better to assess individual nutrient levels. Those who used the FSA scheme in our interviews were significantly more likely to correctly identify all of the nutrient levels (ie. the level of fat, sugar or salt a product contained). This was also true among people from lower socio-economic groups, those who said they don't usually look at labels, people with less education and those with sight problems.

ABILITY TO CORRECTLY IDENTIFY THE LEVELS OF KEY NUTRIENTS (%)



- The majority of consumers did not understand the Tesco colour coding, particularly lower socio-economic groups, with just 37 per cent of those interviewed able to correctly interpret what the colours meant.
- Overall the FSA scheme performed most strongly in both helping consumers to assess levels of individual nutrients and to compare between products. It was also perceived to be the most easy to use.

EASE OF USE

(% who said very/fairly easy)

FSA traffic lights	90%
Tesco GDA	81%
Manufacturers' GDA	82%
Tesco with traffic lights	87%

- The FSA scheme was quicker to use to compare products.

SPEED OF USE

(% who said at a glance/quickly but not at a glance)

FSA traffic lights	93%
Tesco GDA	78%
Manufacturers' GDA	84%
Tesco with traffic lights	83%

- While the actual nutrient information is important, the traffic light colour coding was also key in helping consumers compare products.
- Most people we interviewed (73 per cent) thought it would be confusing if different products use different types of labels.

Base 636

- All of the systems helped people compare between products, but the FSA system led to a significantly higher level of correct comparisons. Ninety seven per cent were able to correctly compare using the FSA scheme compared with 86 per cent for the Tesco scheme. Eighty seven per cent were able to correctly compare using the manufacturers' scheme and 89 per cent using the Tesco scheme with traffic lights.
- People from lower socio-economic groups were more likely to have problems identifying which of the two products we showed them was healthier using the Tesco scheme. Seventy five per cent were able to correctly identify the healthier choice using the Tesco scheme, compared with 90 per cent using the FSA multiple traffic light scheme.

FOOD INDUSTRY RESPONSES

We wrote to the leading food retailers and manufacturers in June 2006 to ask them whether they would be acting on the FSA's recommendations. The information they gave us is summarised in the following tables.

The results were very disappointing. Despite the FSA recommendation that the multiple traffic light labelling scheme is most useful for consumers, several manufacturers and some retailers are instead opting for a GDA based system which is more confusing for consumers. However, a significant number of retailers have committed to using the traffic light system.

**“If you have different labelling
it would be very confusing
you would tend not to
use it at all”**

Man, Weston-super-Mare

FACT:

73%
of interviewees
thought it
would be
confusing if
different
producers used
different types
of schemes

Retailers	Do they intend to use multiple traffic lights?	Will they use the FSA's criteria?
Asda	Yes	Yes. In addition, Asda will also declare energy on front of pack and will include the associated % GDAs for energy, fat, saturates, sugar and salt. It does not currently intend to colour-code energy values
The Co-operative Group	Yes	Yes
Iceland	Not at the present time, but will keep under review	-
Sainsbury's	Yes	Currently do not precisely match FSA criteria. The differences are for salt and sugar. Sainsbury's apply the colours per 100g and per serving and then base the label on whichever is the worst. It is in dialogue with the FSA about how the differences can be resolved
Somerfield	No	-
Tesco	No	-
Marks and Spencer	Partially	Will continue to use the positive 'Eat well' logo on foods that meet their criteria on front of pack to sign-post healthier choices. Intend to introduce colour-coded GDAs on the back of pack and are working with the FSA on the criteria for this
Morrison's	No	-
Waitrose	Yes	Yes

	Are they using a different scheme to the FSA's traffic lights?	Which products is the scheme being applied to and when?
	-	Labelling will start to appear in early Autumn and will be largely completed in the first quarter of 2007. It will be applied to most product categories, including the 'Smart Price' value range
	-	Priority areas for initial roll out of the scheme will be its core pre-packed processed foods sector consistent with FSA priorities. Have not precluded rolling out the scheme to other product areas and in the meantime will maintain its front of pack calories, fat and salt indicator
	Iceland have no plans to introduce a different scheme at the current time	-
	-	Already in use. Aim is to have on all own-brand products except staples and children's products where they do not think it would be helpful or appropriate. The Basics range will be included. It is currently on 1700 products and is expected to be on at least 4000 by January 2007. From September it will also be available on-line
	Following the Tesco scheme. They will give calorie and weight figures in grams for the five nutrients and the %GDA this equates to per serving. The presentation will differ slightly from the Tesco scheme and they will not use the Tesco colour coding	Intend to apply to all packs as they are redesigned and have a rolling programme to extend it to all labels over the next 2 to 3 years. It will complete 40% of all labels this year
	Tesco is using GDA sign-posts to show the amount of calories, sugar, fat, saturates and salt per serving of the product as well as the percentage of the GDA that the food provides. It is also applying its own colour coding which relates to the nutrients rather than levels of nutrients	Have labelled 3000 products, including ready meals, sandwiches, canned products, biscuits, fruit and vegetables. Approx. 7000 products will be labelled by Spring 2007
	-	Intend to introduce colour-coded GDAs on all its food
	Introducing front of pack GDA sign-posting in a single colour format	Started in June with Morrison's 'Free from', 'The Best' and 'Eat Smart' lines
	-	Initially launched onto Waitrose's range of around 40 sandwiches with the intention of rolling out to categories identified by the FSA. Will be appearing on pizzas and on new ranges of ready meals in July. Keen to incorporate onto as many existing ready meals as packaging stocks permit running through to the end of the year

Manufacturers	Example of company's brands	Do they intend to use multiple traffic lights?	Will they use the FSA's criteria?
Associated British Foods	Allinson's, Kingsmill, Ryvita	No response	-
Cadbury Schweppes	Cadbury's, Schweppes, Dr Pepper	No	-
Coca Cola	Coca Cola, Fanta, Oasis	No	-
Danone	Actimel, Activia, Danone	No	-
Heinz	Heinz, HP, Amoy	No immediate plans	-
Kellogg's	Kellogg's, Kashi	No	-
Kerry Foods	Wall's, Matteson's, Mr Brains	No response	-
Kraft Foods	Dairylea, Philadelphia, Terry's	No	-
Masterfoods	Mars, Dolmio, Uncle Ben's	No	-
Nestlé	Nestlé, Buitoni, Ski	No	-
Northern Foods	Fox's, Goodfellas, Dalepak	Where retailers require it for supermarket own brands. Reviewing use of traffic lights and other approaches as part of a review of labelling for their branded products	-
Pepsico	Pepsi, Walker's, Quaker	No	-
RHM	Sharwood's, Hovis, Mr Kipling	No response	-
Unilever	Knorr, Bertolli, Birds Eye	No	-
United Biscuits	KP, Jacob's, McVitie's	No response	-
Yoplait Dairy Crest	Yoplait, Weightwatchers, St Ivel	No – it is observing the debate closely and will take appropriate steps as necessary to comply with legislation	-

Are they using a different scheme to the FSA's traffic lights?	Which products is the scheme being applied to and when?
No response	
Will introduce a front of pack GDA icon directing consumers to its back of pack information built around GDAs. Also working with Masterfoods on a 'Be Treatwise' consumer education messaging campaign	All confectionery lines excluding gifting and gum. Roll out will begin in October 2006
From January 2006, Coca Cola has been including calories per pack and GDAs for calories in a tabular form on packs	All Coca Cola packaging
Danone intend to use a monochrome version of the Tesco scheme	Beverage range using the scheme is now available in shops
Heinz are supportive of the use of GDAs and are planning to include values as part of the back of pack information panel. It is also reviewing how best this information might be given on front of pack	-
Kellogg's intend to use a monochrome version of the Tesco scheme	Kellogg's Cornflakes will soon carry the scheme
No response	
Kraft intend to use a monochrome version of the Tesco scheme	No information provided
Has launched a 'Be Treatwise' initiative with Cadbury Trebor Bassett in February 2006 concentrating on highlighting GDAs. A logo on the front of pack directs consumers to the information panel and GDA information per portion for calories, sugar, fat, saturates and salt on the back	'Be Treatwise' will appear on a range of funsize and multipacks including Twix, Galaxy, Mars, Milky Way, Snickers and Maltesers from Autumn 2006
Nestlé will be using a monochrome version of the Tesco scheme	Shreddies are now available in shops using the scheme
Where retailers require it for supermarket own brands. Reviewing use of traffic lights and other approaches as part of a review of labelling for their branded products	Final agreed approach will be applied across all of Northern Foods' brands. It hopes to introduce changes in the next 12 months on a rolling basis
Pepsico will be using a monochrome version of the Tesco scheme	Walkers crisps will soon carry the scheme
No response	
All Unilever brands will carry GDA information for calories, sugar, fat, saturates and salt on the front of their packs	The first products will be Birds Eye peas and Flora from August 2006. It expects to have completed this labelling on all brands by the middle of 2007
No response	-
-	-



CALLING FOR ACTION

Which? research has found that a traffic light labelling scheme is the best way to help consumers make healthier choices. Front-of-pack nutrition labels must be driven by what works best for consumers. It is vital that consumers are provided with the scheme that is most useful and understandable. Retailers and manufacturers need to accept that they have an important role in helping people to improve their diets.

- › All food manufacturers and retailers should adopt the FSA's multiple traffic light scheme.
- › The FSA must continue to promote its scheme, raise consumer awareness of how it works and explain how to tell whether foods are high, medium or low in fat, saturates, sugar and salt.

For further information please contact:
public_affairs@which.co.uk Tel: 0207 770 7214.

More information can also be found on our website (www.which.co.uk/campaigns)

Published by: Which?, 2 Marylebone Road, London NW1 4DF.

Which? campaigns actively for all consumers. With around 700,000 members in the UK, we are the largest consumer organisation in Europe. Entirely independent of government and industry, we are funded through sales of our consumer magazines, online products and books.

Which? is the operational name of Consumers' Association - a registered charity No 296072.