

Navigating food & beverage choices in Australia

Prepared for
AANA



Background

Discussions around food advertising regulations have intensified in recent years, particularly concerning “occasional foods” - products often high in sugar, salt, or fat - and how they are marketed to Australians.

At the heart of the debate is whether advertising restrictions can meaningfully influence dietary choices or if broader lifestyle and education initiatives are more effective.

To explore these questions, the Australian Association of National Advertisers (AANA) commissioned Nielsen to conduct a comprehensive study examining consumer attitudes towards food advertising, self-regulation, and government intervention.

The research delves into how Australians develop healthy eating habits, highlighting key factors such as self-awareness around food choices, meal planning, health education, and regular exercise.

The data shows that parents, in particular, see themselves as playing a pivotal role in shaping their children’s dietary habits through role modelling and structured routines. Notably, parental oversight exerts a stronger influence on children’s occasional food intake than media exposure, including advertising and screen time.

The study also examines public sentiment on advertising restrictions. Notably, findings reveal that 71% of Australians are satisfied with existing regulations, which include limits on marketing to children under 15s and restrictions on outdoor ads near schools.

Moreover, 74% of surveyed consumers favour health education and subsidies for nutritious foods over additional advertising bans, underscoring a preference for informed decision-making rather than stricter prohibitions.

When it comes to tackling obesity through government policy, Australians believe the most effective interventions are:

- **Promoting physical activity (58%)**
- **Subsidising healthy foods (54%)**
- **Implementing healthy eating education programs in schools (53%)**
- **Providing nutritious meals in schools (52%)**
- **Enhancing nutrition labelling (49%)**

The findings provide crucial insights into how policy changes resonate in real-world contexts, particularly among consumers who theoretically support tighter regulations, but may react differently when considering broader community impacts.

This report aims to inform policymakers, advertisers, and community leaders by presenting data-driven recommendations that balance health advocacy with consumer choice.

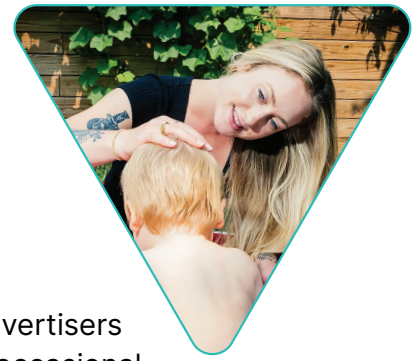
By providing an in-depth look at the evolving landscape of food marketing and public perception, Nielsen’s research reinforces the AANA’s commitment to evidence-based approaches that align industry standards with community expectations.



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About this report

This report, commissioned by the Australian Association of National Advertisers (AANA) and conducted by Nielsen, examines the current landscape of occasional food and beverage advertising in Australia. It provides key insights for industry stakeholders, policymakers, and consumer advocates, focusing on consumer attitudes, advertising impact, and potential regulatory changes.

Research objectives

This report aims to understand consumer behaviours and attitudes towards occasional foods and beverages. Additionally:

- Assess the many complexities surrounding food choices and the main drivers of those choices.
- Assess public sentiment on advertising restrictions, evaluating whether additional regulations are seen as necessary or effective.

Methodology & sample design

To ensure a robust and representative analysis, Nielsen conducted a customised, quantitative online survey, with a nationally representative sample of 2,087 Australians aged 18–65. This large-scale survey provides a strong foundation for understanding consumer sentiment, with results reflecting the views of millions of Australians across different demographics and lifestyles.

Additionally, fieldwork was conducted between September 26 and October 21, 2024, capturing a timely and comprehensive snapshot of public opinion. The survey lasted 15 to 20 minutes, carefully designed to provide in-depth insights while maintaining high engagement from participants. This extensive dataset enables high-confidence findings, offering policymakers and industry stakeholders a reliable measure of public attitudes towards occasional food advertising and potential regulatory changes.

The sample design ensured broad representation across key demographics.

- **Age:** Balanced quotas across all age groups.
- **Family status:** Included both parents (with children aged 1–15) and adults without children to capture different household perspectives.
- **Geographic diversity:** 71% metropolitan and 29% regional representation to reflect differences in lifestyle, access to food choices, and media consumption.
- **Consumer experience:** All participants had consumed occasional foods or beverages in the past year, ensuring relevant responses.

1. Developing healthy eating habits

Most effective methods for healthy eating in adults

When it comes to the most effective methods for developing healthy eating habits for adults, Australians believe that self-awareness around eating habits, meal planning, health education and regular exercise are the key strategies. Those surveyed ranked the following strategies as the most effective:

1. Self-awareness around eating habits

Consciousness about what and when one eats is considered essential. Mindful eating helps reduce impulsive food choices and promotes better control over dietary habits.

2. Meal planning & preparation

Planning meals in advance ensures nutritious choices, prevents reliance on processed foods, and helps with portion control.

3. Health education & awareness

Nutrition education raises awareness of the benefits of balanced diets and the risks of poor food choices, equipping individuals to make informed decisions.

4. Regular exercise

Physical activity complements healthy eating by supporting weight management and overall well-being, reinforcing healthier lifestyle choices.

5. Setting goals & tracking progress

Establishing and monitoring specific dietary goals helps maintain motivation and accountability.

6. Following a diet plan

Structured diet plans offer clear guidance, which can be particularly beneficial for weight management and specific health conditions.

7. Seeking professional support

Consulting a nutritionist or dietitian provides personalised advice and accountability, enhancing dietary improvements.

8. Advertising restrictions

Australians recognise the potential role of restrictions on unhealthy food advertising in supporting healthier choices, but consider other methods to be more effective.



Most effective methods for healthy eating in children

When it comes to the most effective way of developing healthy eating habits in children, survey participants ranked parents establishing healthy eating habits at home in the early years, regular exercise, being aware of what they are eating, parents setting healthy eating goals and tracking them and meal planning and preparation as the top 5 methods.

1. Parents establishing healthy eating habits at home in the early years

Parents play a fundamental role in shaping children's eating habits by modelling healthy choices and establishing structured routines.

2. Regular exercise

Physical activity is seen as crucial in complementing good nutrition and fostering lifelong healthy habits.

3. Awareness of food intake

Teaching children about portion sizes and mindful eating helps them develop a balanced approach to food.

4. Parental goal-setting & tracking

Parents guiding and monitoring children's dietary habits ensures consistency in healthy eating practices.

5. Meal planning & preparation

Providing nutritious, home-prepared meals makes it easier for children to develop and maintain healthy eating habits.

6. Health education in schools

Teaching nutrition in schools is seen as vital for equipping children with the knowledge to make informed food choices.

7. Teacher involvement

Educators play a key role in reinforcing healthy eating messages and encouraging nutritious choices in school settings.

8. Professional guidance

Consulting dietitians or nutritionists can help families navigate dietary needs and reinforce positive habits.

9. Following a diet plan

A structured plan can provide clear guidance for children and families to maintain consistent eating patterns.

10. Advertising restrictions

Reducing children's exposure to unhealthy food advertising is seen as a supportive measure in promoting good dietary habits, but other methods are considered to be more effective.

2. Parental oversight drives food consumption in kids research shows

Parents view themselves as having significant control over their children's dietary habits, emphasising role modelling and structured routines.

Parental oversight remains a stronger determinant for children's occasional food intake than media consumption through screen time and advertising exposure.

Balancing health & treats

An overwhelming **88% of parents aim to provide their children with a healthy diet** while allowing occasional treats, demonstrating a balanced approach to food consumption. Additionally, **84% believe in the importance of treating children occasionally, with only 3% disagreeing. Parents overwhelmingly prefer healthier food options for their children, with 80% prioritising nutritious foods and 75% opting for healthier beverages, such as juice, over less nutritious alternatives.**

While parents strive for a healthy diet, moderation remains key. **67% agree that consuming occasional foods in moderation is not harmful, and 63% habitually check nutrition labels when purchasing packaged foods. Structured eating habits also play a role, as 61% believe meal planning helps maintain healthier diets for their children.**

Parental control & influence over children's diets

Parents perceive themselves as having a strong influence over their children's eating habits, with **75% believing they have significant control over what their children eat and 73% feeling their dietary choices will impact their children's future health.** Additionally, **69% believe monitoring their children's diet is essential for preventing weight gain,** and the same percentage report familiarity with the nutritional properties of different foods.

Role of media & advertising in children's eating habits

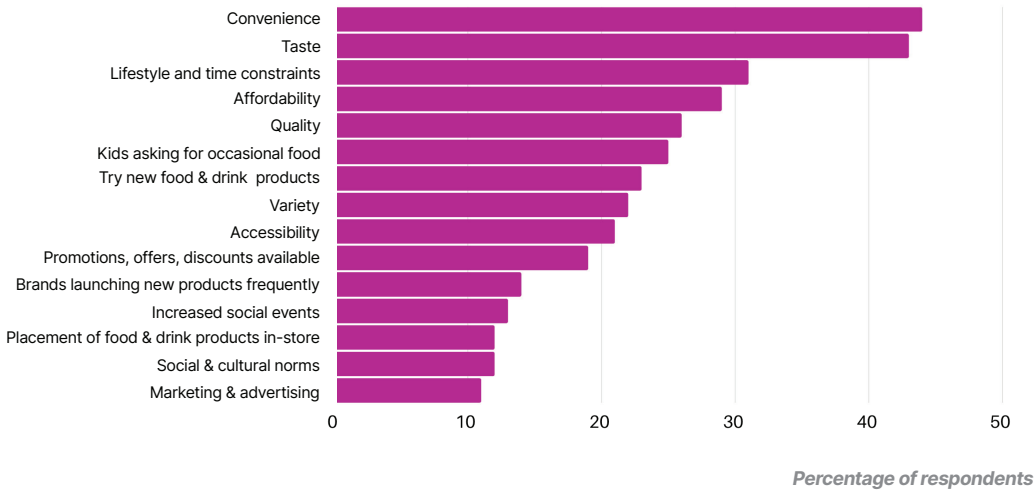
Parental control extends beyond food choices to media consumption. **98% of parents believe it's important to actively monitor their children's media exposure to mitigate the influence of food advertisements.**

Parental oversight is the strongest determinant in influencing children's food choices, with **61% actively limiting these foods for their children due to health concerns.** This aligns with a broader societal push for improved dietary habits, focusing on education, accessibility, and regulation as key strategies in addressing dietary health challenges.

3. Main drivers of occasional food consumption

With Australians' increasingly busy lifestyles, the main drivers of increased occasional food consumption are: convenience (44%), taste (43%), lifestyle and time constraints (31%), affordability (29%), and quality (26%).

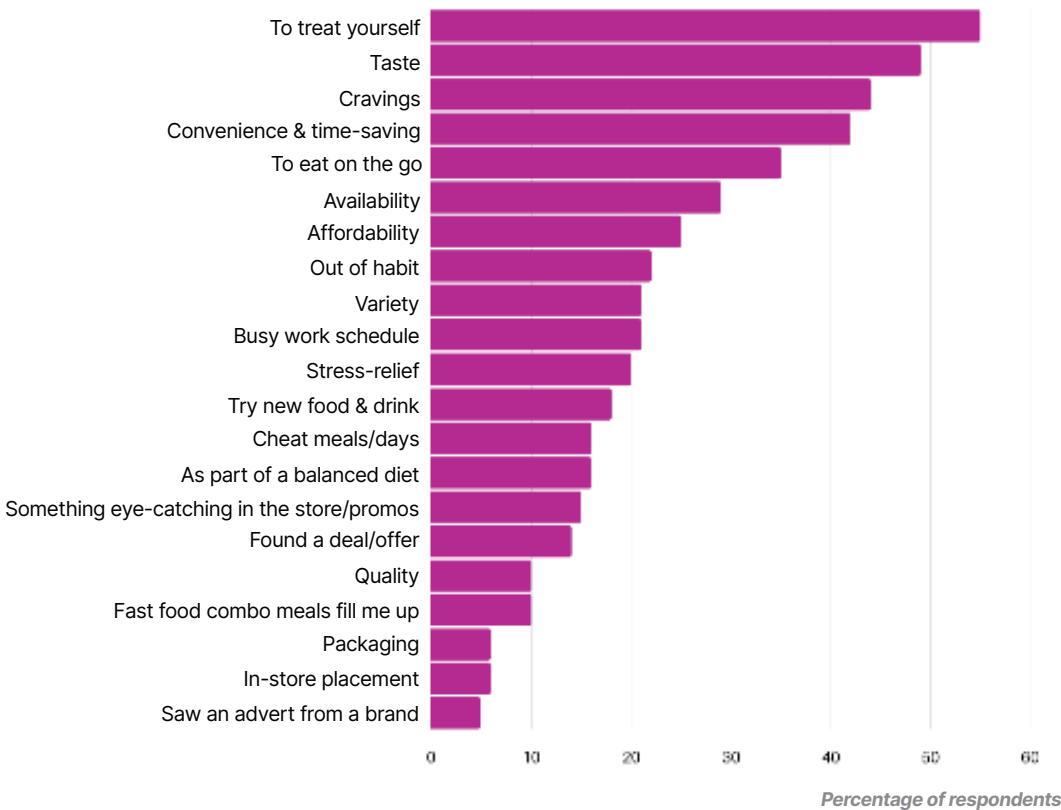
Reasons for increased consumption



4. Top motivators for consuming occasional foods

The motivations for consuming occasional foods are mainly as a treat (55%), taste (49%) or cravings (44%).

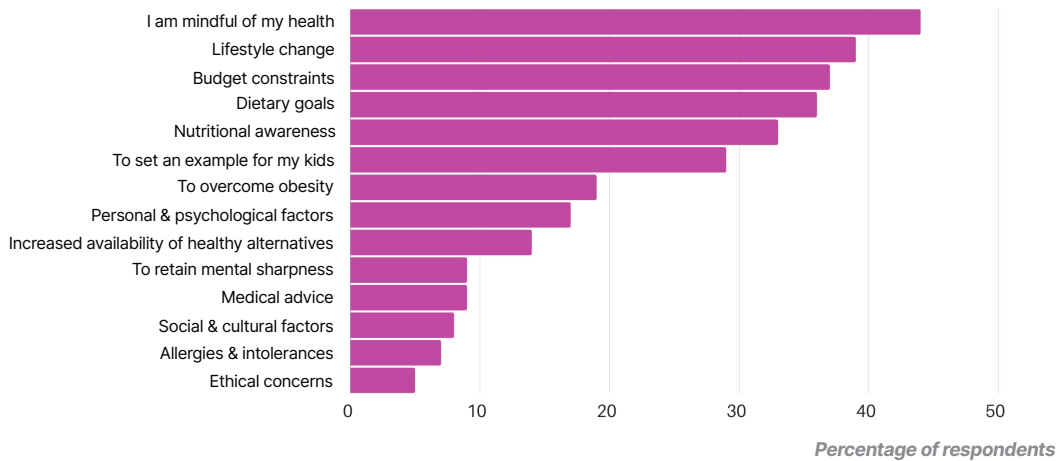
Reasons for consumption



5. Main reasons for reduction in occasional food and drink intake by adults

Surveyed adults who reported a reduction in their occasional food and drink intake, cited mindfulness of health (44%), lifestyle change (39%), budget constraints (37%), dietary and fitness goals (36%) and nutritional awareness (33%) as the top drivers for eating less occasional food and drink.

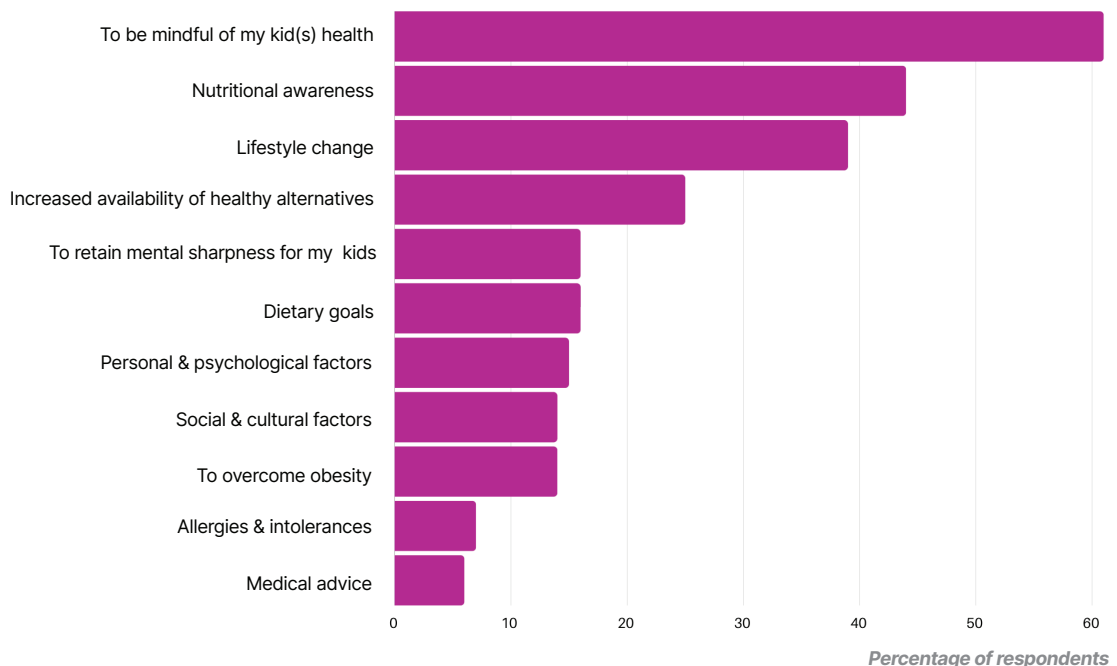
Reasons for decreased consumption



6. Parents' reasons for kids decreased occasional food consumption over the past 12 months

Surveyed parents who reported a reduction in their children’s intake of occasional food and drinks cited mindfulness of their child’s health (61%), nutritional awareness (44%), lifestyle change (39%), increased availability of healthy alternatives (25%) and dietary and fitness goals (16%) as the key drivers for the reduction.

Key reasons for consumption



7. Research shows majority of consumers are satisfied with existing advertising restrictions

Nielsen's research shows a majority of consumers (**71%**) are satisfied with the current advertising restrictions, which prohibit targeting children under 15 and limit outdoor advertising near schools.

Among those aware of these regulations, satisfaction remains consistently high, reflecting a public perception that these measures are effective in limiting children's exposure to advertising and promoting balanced dietary messages.

However, public awareness of these restrictions remains relatively moderate, with **only 44% of Australians** indicating familiarity with the existing rules. This suggests that while most of those aware of the regulations believe they are sufficient, greater public education on these policies could further reinforce their effectiveness.

The classification of foods as either "essential" or "occasional" within advertising regulations has been implemented to encourage healthier lifestyle messaging and protect children from excessive exposure to occasional food promotions.

While consumer approval is strong, this data highlights an ongoing need for clear communication about the intent and scope of these regulations to ensure broader public understanding.

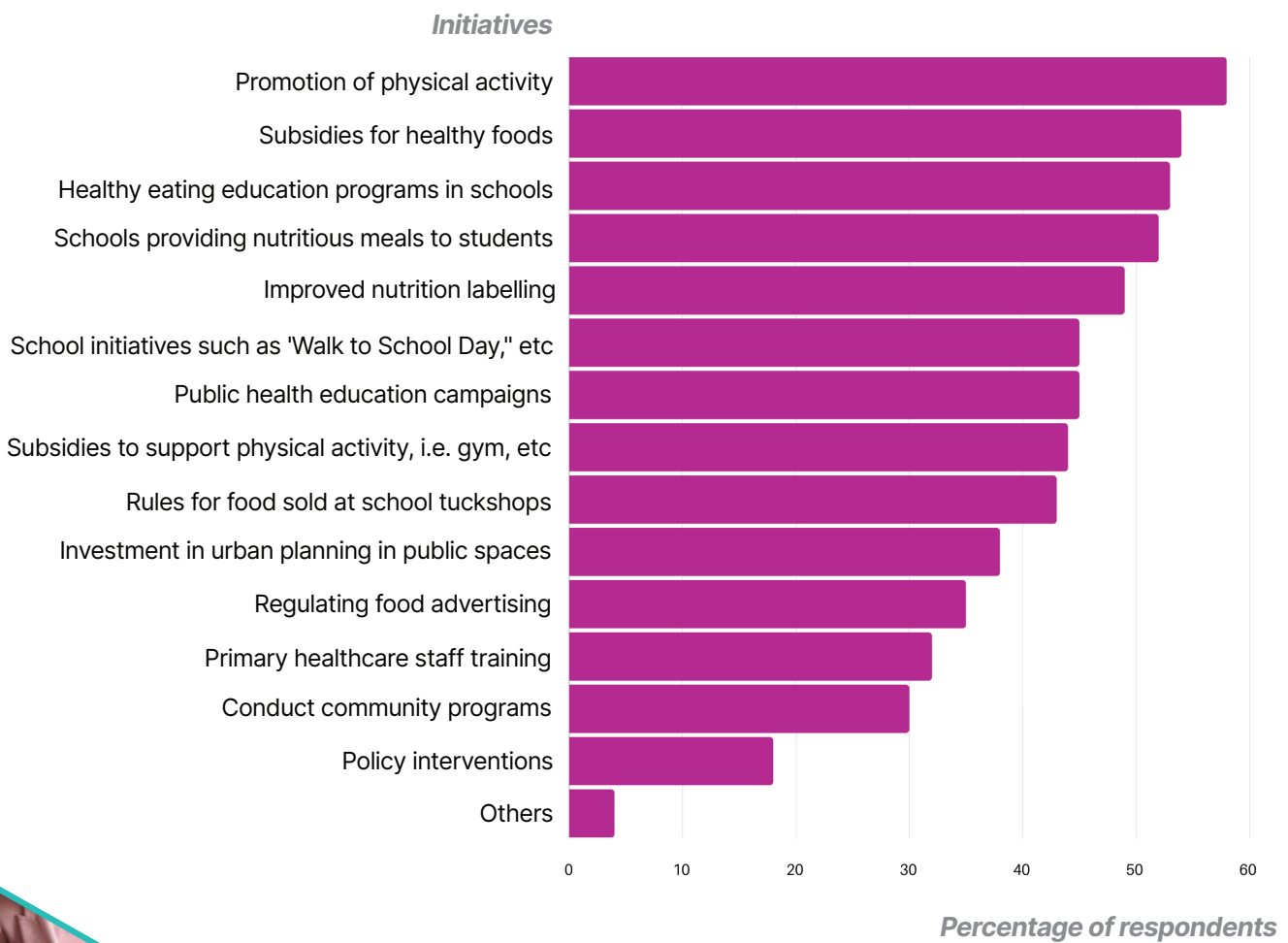
Australians generally support the current approach to food advertising regulations, with most consumers expressing satisfaction with existing restrictions and prioritising education over further bans.



8. Australians' preferred government policies for tackling obesity

Beyond regulatory measures, Australians overwhelmingly prioritise education and incentives over further advertising restrictions, with **74% of consumers believing that health education and subsidies for healthy food should take precedence**. Australians believe the following solutions are the most effective government initiatives for tackling obesity: promotion of physical activity (58%), subsidies for healthy foods (54%), healthy eating education programs in schools (53%), schools providing nutritious meals to students (52%), and improved nutrition labelling (49%).

Perceived effective solutions for tackling obesity



9. Summary

Public discussions around food advertising regulations have intensified, particularly regarding occasional foods - products often high in sugar, salt, or fat. Australians emphasise education, self-awareness, and informed choices as the most effective strategies for developing healthy eating habits.

Key consumer insights

- Adults believe self-awareness around eating habits, meal planning, health education, and regular exercise are the most effective ways to develop healthy eating habits.
- For children, parents emphasise early role modeling, structured routines, and tracking healthy eating goals as critical factors in shaping dietary habits.
- Drivers of occasional food consumption include convenience (44%), taste (43%), lifestyle/time constraints (31%), affordability (29%), and quality (26%).
- Top motivations for consuming occasional foods are treating oneself (55%), taste (49%), and cravings (44%).

Shifting consumption habits

- Among adults reducing occasional food intake, key motivators include health mindfulness (44%), lifestyle changes (39%), budget constraints (37%), dietary and fitness goals (36%), and nutritional awareness (33%).
- Parents reducing their children's occasional food intake cited their child's health (61%), nutritional awareness (44%), lifestyle change (39%), availability of healthy alternatives (25%), and fitness goals (16%) as primary drivers.

Attitudes towards regulation & policy priorities

- 71% of consumers are satisfied with current advertising restrictions, which include bans on targeting children under 15 and limits on outdoor ads near schools.
- 74% of Australians prefer education and subsidies for healthy food over further advertising bans, reinforcing a strong consumer preference for informed decision-making rather than regulatory expansion.
- Australians believe the most effective government interventions for tackling obesity are:
 - Promotion of physical activity (58%)
 - Subsidies for healthy foods (54%)
 - Healthy eating education programs in schools (53%)
 - Schools providing nutritious meals (52%)
 - Improved nutrition labeling (49%)

This data underscores the complex motivations behind occasional food consumption and highlights the potential for targeted strategies that align with consumer priorities. Rather than focusing on further advertising restrictions, Australians favour education, affordability measures, and initiatives that empower individuals to make healthier choices.

