

Honey Attitude & Usage Study



SRG | OCTOBER 2020

Today

- ✿ Objective and Methodology
- ✿ Attitudes, Awareness, and Usage
- ✿ Path to Purchase
- ✿ Sustainability Concerns
- ✿ Consumer Focus Group Highlights
- ✿ Program Implications

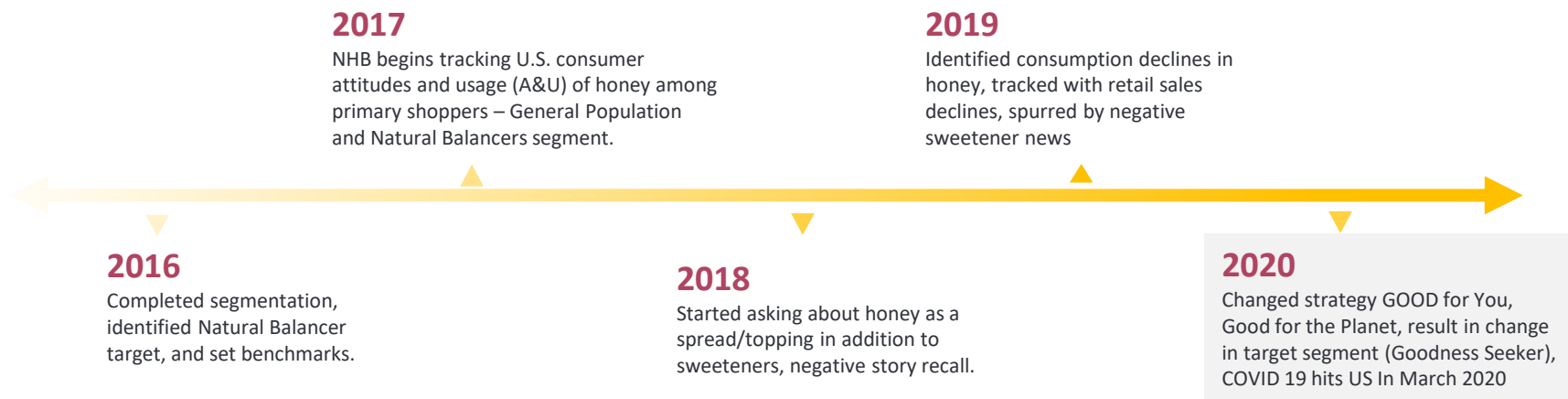


A still life photograph on a dark, textured wooden surface. On the left, a white ceramic plate holds a small glass jar with a silver clasp lid. The jar is filled with a white substance, likely yogurt, topped with fresh blueberries, yellow crumbles, and a slice of cucumber. To the right of the plate is a bouquet of several pink daisy-like flowers with green foliage. The scene is lit with soft, natural light, creating a calm and aesthetically pleasing atmosphere.

Objective and Methodology

Study History

This study helps understand consumer dynamics by tracking awareness, self-reported usage, and attitudes and perceptions of honey and other sweeteners. Results help guide program strategies, messaging and gauge program effectiveness.



COVID Impact

With the onset of COVID-19, we have experienced significant disruption and impact to our economic and social well-being. With respect to consumer behaviors, social distancing has increased consumption of eating at home, comfort foods (including sweets and snacks), and seen a decline in restaurant meals (although consumers are doing their best to support local favorites with pick up and delivery).

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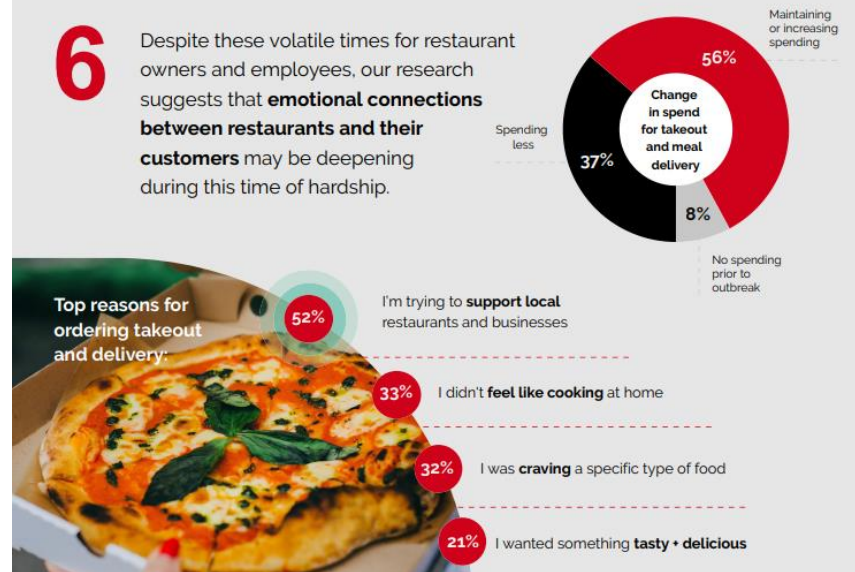
Grocery shopping behavior has changed rapidly in the last two weeks. **Shoppers are flocking to the center of the store, have become less price sensitive, and are buying more online.**

Changes in grocery shopping behavior:



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Despite these volatile times for restaurant owners and employees, our research suggests that **emotional connections between restaurants and their customers** may be deepening during this time of hardship.



Methodology

Quantitative Study

- This is a tracking study, fielded in June of 2020
- Online quantitative survey conducted with US consumers (primary food shoppers)
- Sample
 - N = 2,000 (General Population);
 - N = 329 (Natural Balancers)
 - N=350 (Goodness Seekers)
 - Balanced to census for age & ethnicity
- How to Read This Report

Symbol Key	
↑	Statistically significant at 95% ; increase vs. 2019
↓	Statistically significant at 95%; decrease vs. 2019
* **	New for 2020

Qualitative Study

- Virtual consumer focus groups
- Conducted September 22-24, 2020
- Total of 36 Goodness Seekers, across the nation





Meet ...
The Goodness Seeker

Skew female Millennials, married/engaged, educated and employed



Gen Z (1997–2010)	Millennials (1977–1996)	GenX (1965–1976)	Boomers (1946–1964)
7% 94 index	37% 104 index	19% 98 index	28% 98 index

	Demographics
Audience Size	17% U.S. Adults (42M)
Gender	63% F / 37% M
Median Age	46 yrs
Median HHI Income	\$77k
Children in the HH	38%
Work Full or Part Time	63%
Married or Engaged	57%
Urban or Suburban (A/B County)	79%
Bachelor's Degree+	38%

The Goodness Seekers are...

- A powerful group of influencers
 - 60% say friends/family **ask for their advice** when it comes to food (153 index)
 - 51% are always the **first** of their friends **to try new products** or **services** (154 index)
- Shop a variety of chains with an edge toward upscale/progressive stores. Often plan shopping trips in advance but make several trips a week
 - 75% **prepare a list ahead of time**, and typically make **3-4 trips** to the grocery store per week
 - **44% have used honey** in the last 6 months (112 index)
- Dine at chain restaurants with diverse and better-for-you menu options
- Lean into digital and print media, but heavy time spent watching TV
- Turn to food, lifestyle, entertainment, news publishers. Heavy social and streaming audio





Attitudes, Awareness & Usage

SWEETENER AWARENESS: Down from Year Ago for Gen Pop (question rewording)

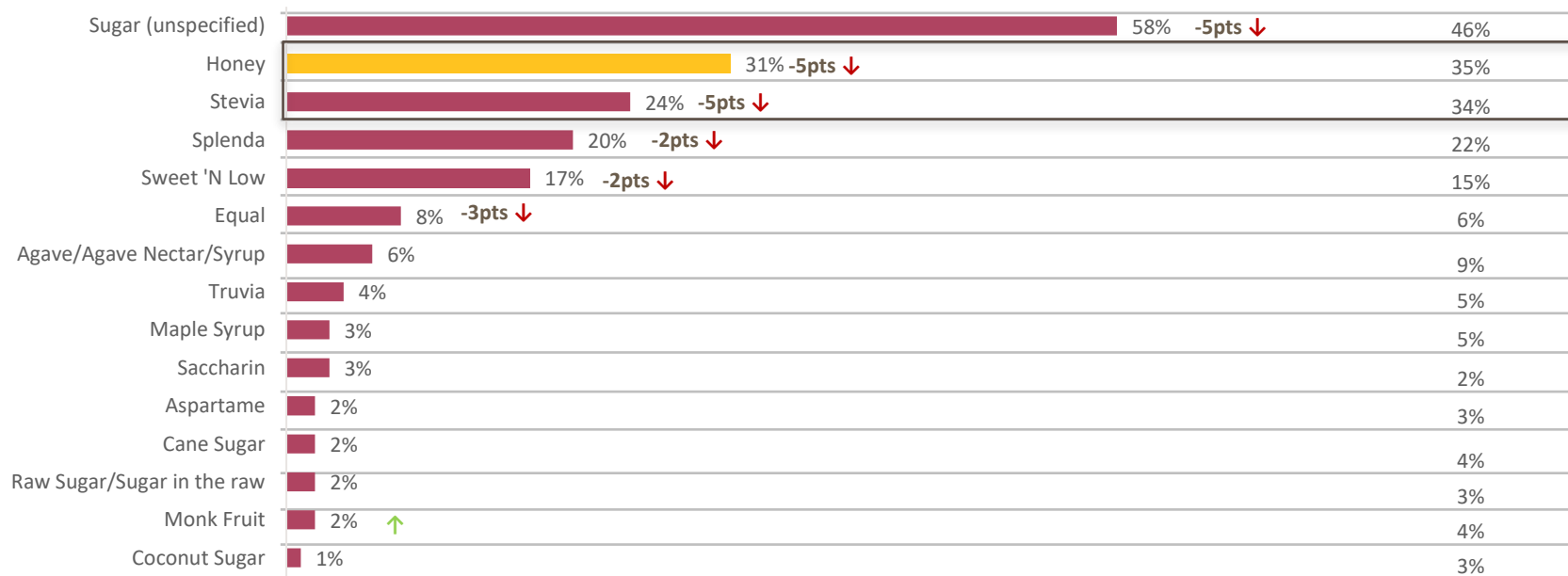
Unaided awareness for sweeteners is down from year ago, including honey, there was a slight word change from 2019 that likely influenced the decline.

Sweetener Awareness – Top 15 Unaided

(n = 2,000, Gen Pop)

Goodness Seeker

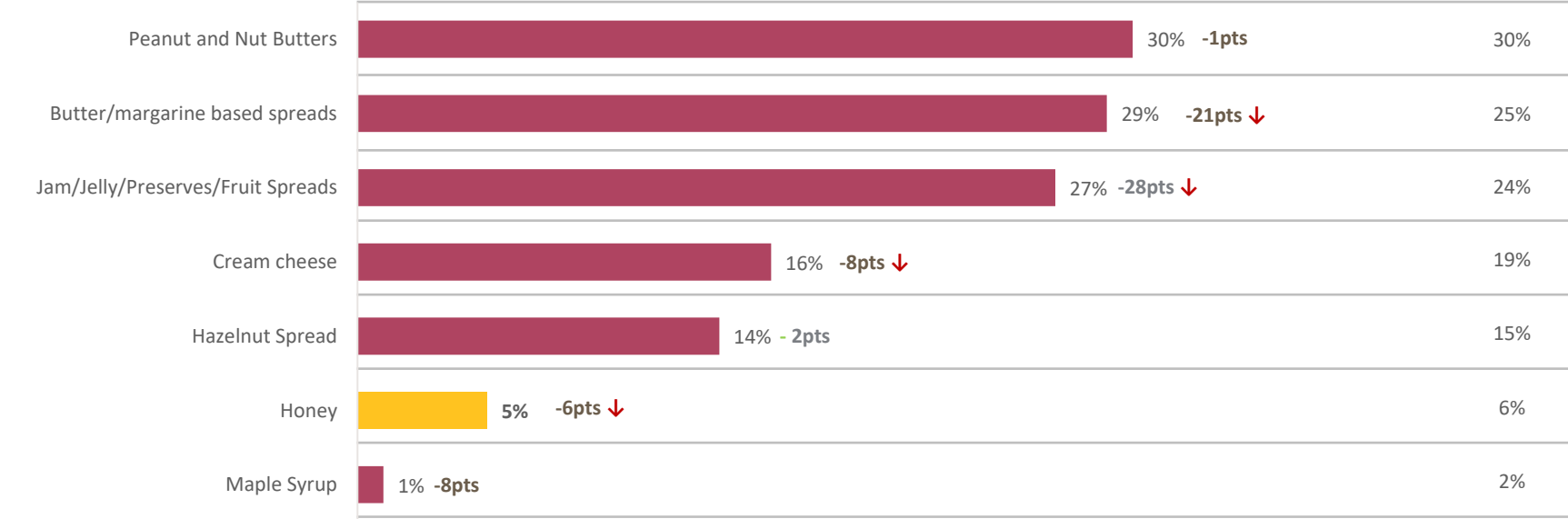
(n=350)



SPREADS AWARENESS: Overall question rephrasing drove decline for the category; however, awareness is still low for honey.

Morning Toppings/Spread Awareness - Unaided
(n = 2,001, Gen Pop)

**Goodness
Seekers**
(n = 350)



PERCEPTIONS:

Health perceptions have increased YOY

Honey has many benefits that consumers identify with, what's noticeable is how healthy perceptions have increased year over year.

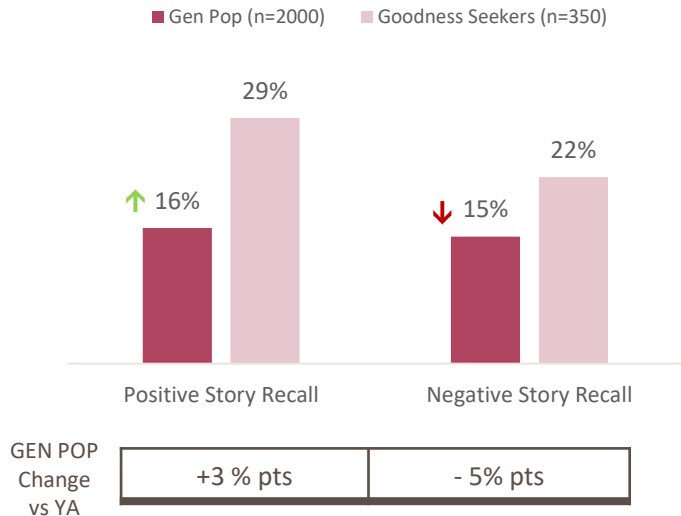
Honey Attribute Delivery – Tracking, (Top 2 Box, “Good” + “Excellent”)

	2017 Gen Pop	2018 Gen Pop	2019 Gen Pop	2020 Gen Pop	2020 vs 2019
BROAD APPEAL/VERSATILITY					
Something everyone would enjoy	81%	78%	73%	73%	NC
Something you had on hand	79%	80%	73%	73%	NC
Versatile	81%	78%	71%	72%	1%
HEALTH/NATURAL					
Healthy	85%	80%	76%	79%	3%
Natural (previously Natural/Unprocessed)	90%	85%	85%	87%	2%
A good source of vitamins	76%	71%	60%	69%	9% ↑
Gives you energy	78%	71%	62%	70%	8% ↑
Organic	81%	72%	63%	67%	4% ↑
Locally sourced/produced	85%	74%	68%	75%	7% ↑
GMO free	75%	71%	60%	66%	6% ↑
Low in calories	53%	54%	46%	50%	4% ↑
Contains no added ingredients	-	84%	79%	81%	3%
Labeled as "raw"	-	-	60%	66%	6% ↑
Unprocessed	-	-	71%	74%	3%
Has a "clean" ingredient label	87%	81%	73%	76%	3%
Good source of antioxidants	-	-	-	70%	-
Good for my digestive health	-	-	-	72%	-
Is vegan	-	-	-	52%	-
FLAVOR & TASTE					
Flavorful	89%	88%	84%	84%	NC
CONVENIENT					
Convenient/easy to use	81%	78%	74%	78%	4% ↑
Something you had on hand	79%	80%	73%	73%	NC
A GOOD VALUE	71%	72%	68%	68%	NC
FITS MY LIFESTYLE	-	73%	66%	68%	2%
COMFORTING/FAMILIAR					
Familiar	90%	86%	80%	82%	2%
Comforting	83%	79%	72%	76%	4% ↑
GOOD AT BREAKFAST	-	83%	79%	77%	-2%
SUSTAINABILITY					
Sustainably produced	-	-	-	75%	
Good for the environment	-	-	-	75%	

POSITIVE VS. NEGATIVE STORY RECALL: Negative sweetener news is on the decline

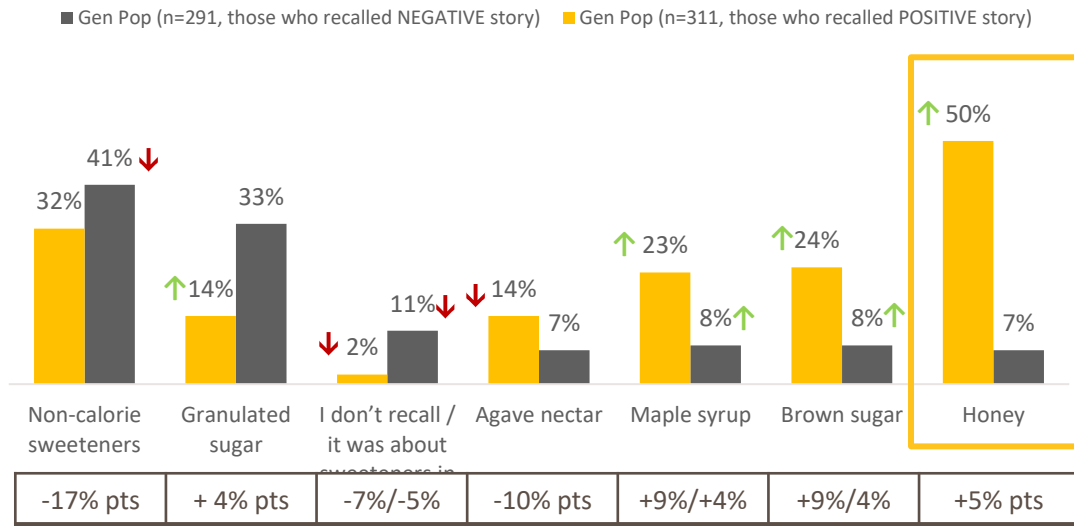
Sweetener Story Recall

(Among those recalling positive or negative story)



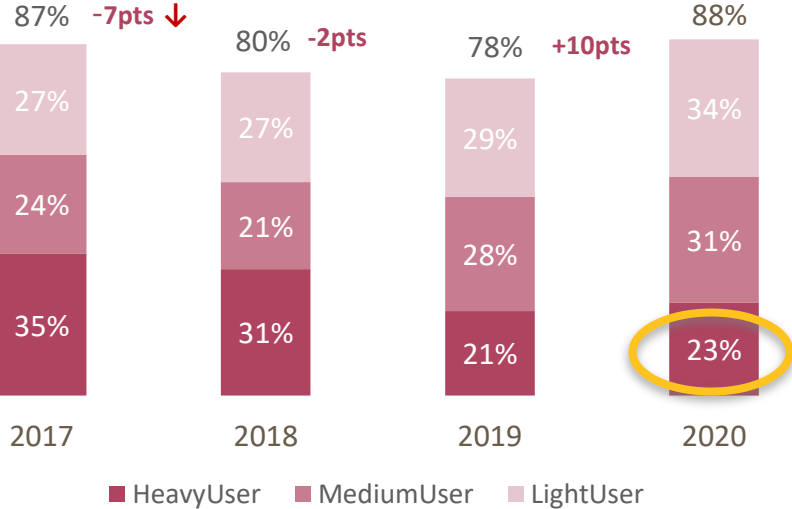
Sweetener Mentioned in Story

(Among those recalling positive or negative story)

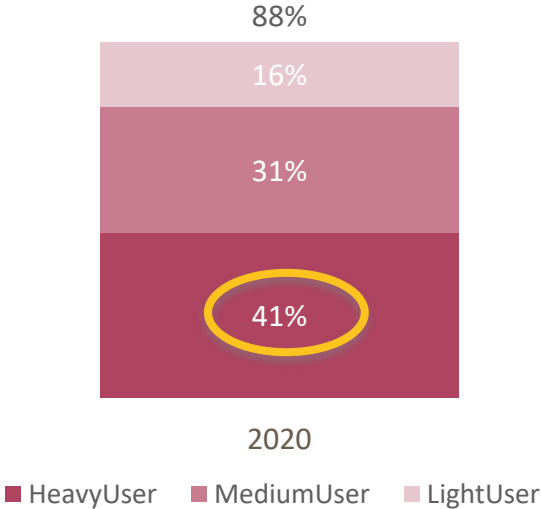


USAGE FREQUENCY: With less negative news, honey usage is increasing across heavy, medium and light users

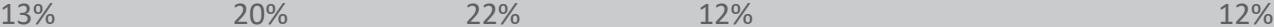
Honey Usage H/M/L – Self Reported Frequency
General Population



Honey Usage H/M/L – Self Reported Frequency
Goodness Seeker



Non-User

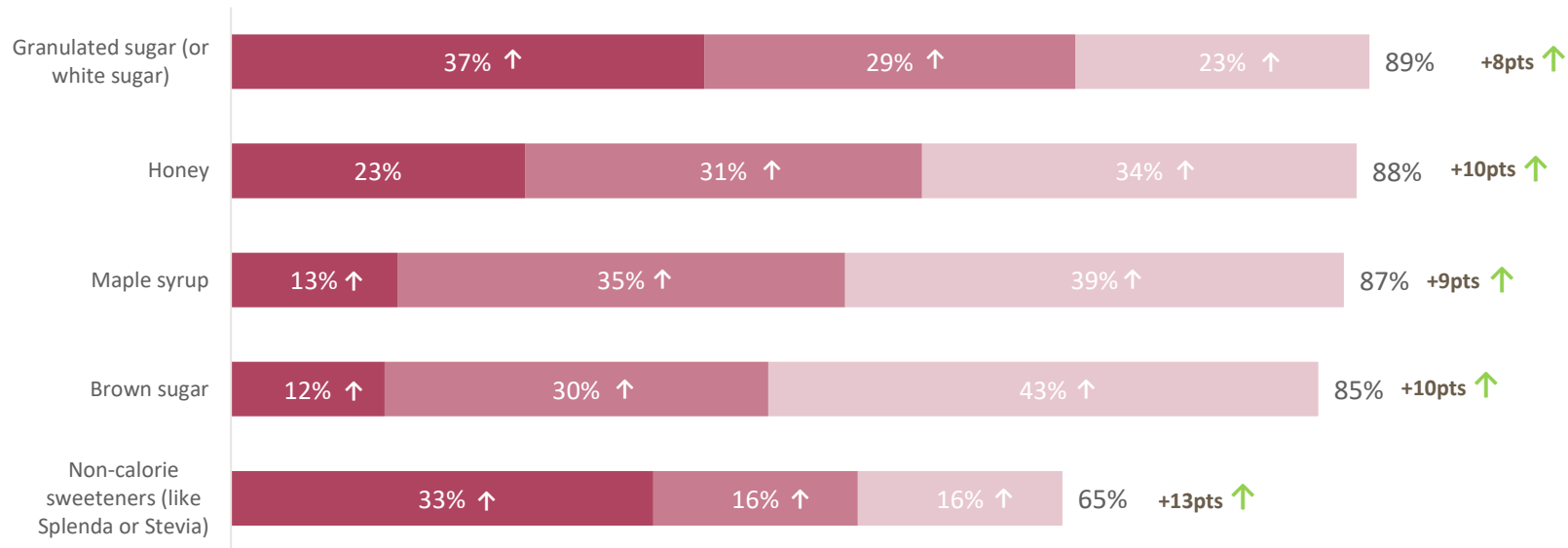


GP SWEETENER USAGE: Usage is on the rise...

How often do you eat the following sweeteners, either by themselves or in other foods or beverages?

(n = 2,000, Gen Pop)

■ Heavy (multiple times per week or more) ■ Medium (multiple times per month/once a week) ■ Light (multiple times per year but less than once a month)

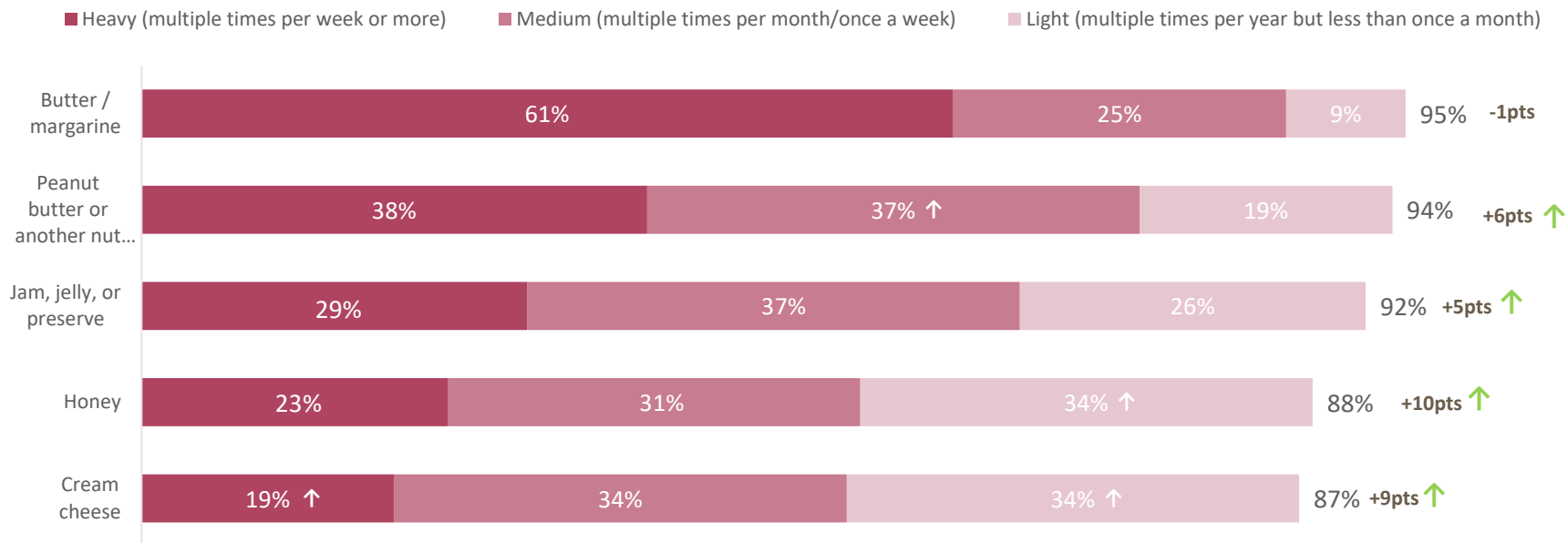


GP SPREADS USAGE:

Honey spread usage is up overall, trending with other spreads.

How often do you eat the following toppings, either by themselves or in other foods or beverages?

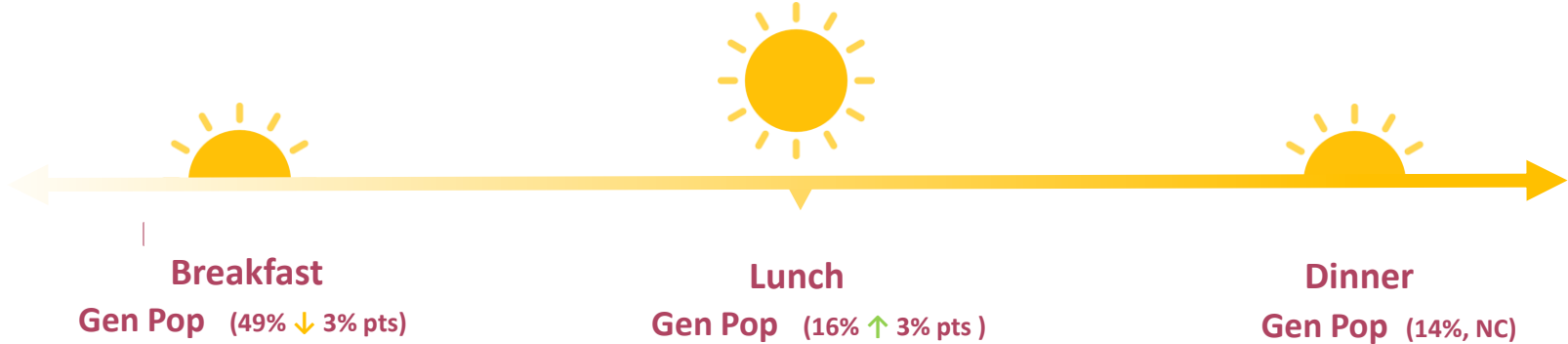
(n = 2,001, Gen Pop)



TYPICAL USAGE: Breakfast remains the daypart with the most honey usage.

Typical Honey Usage Across Forms/Occasions (Summary of Top 4 Box)

(n= 1,568, Gen Pop; n = 267, Natural Balancer)



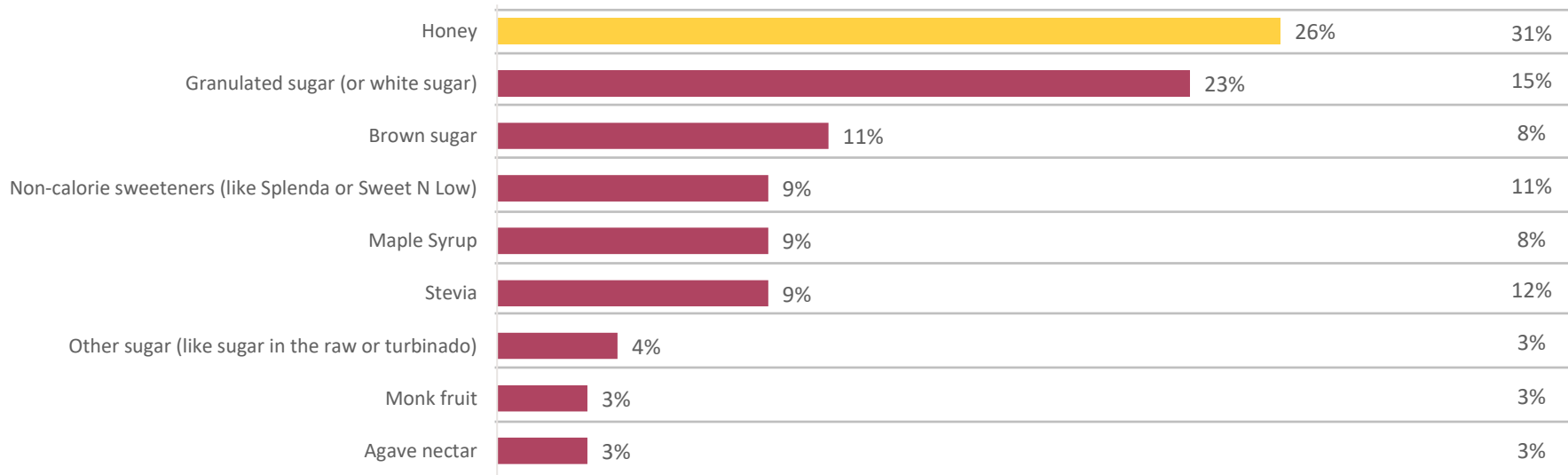
SWEETENER PREFERENCE: HONEY IS THE MOST PREFERRED SWEETENER

Honey has surpassed sugar as the most preferred sweetener with the general population, granulated sugar and non-calories sweeteners have dropped in preference.

Which of the following sweeteners is your favorite?

(n = 2,000, Gen Pop)

Goodness
Seekers
(n = 350)

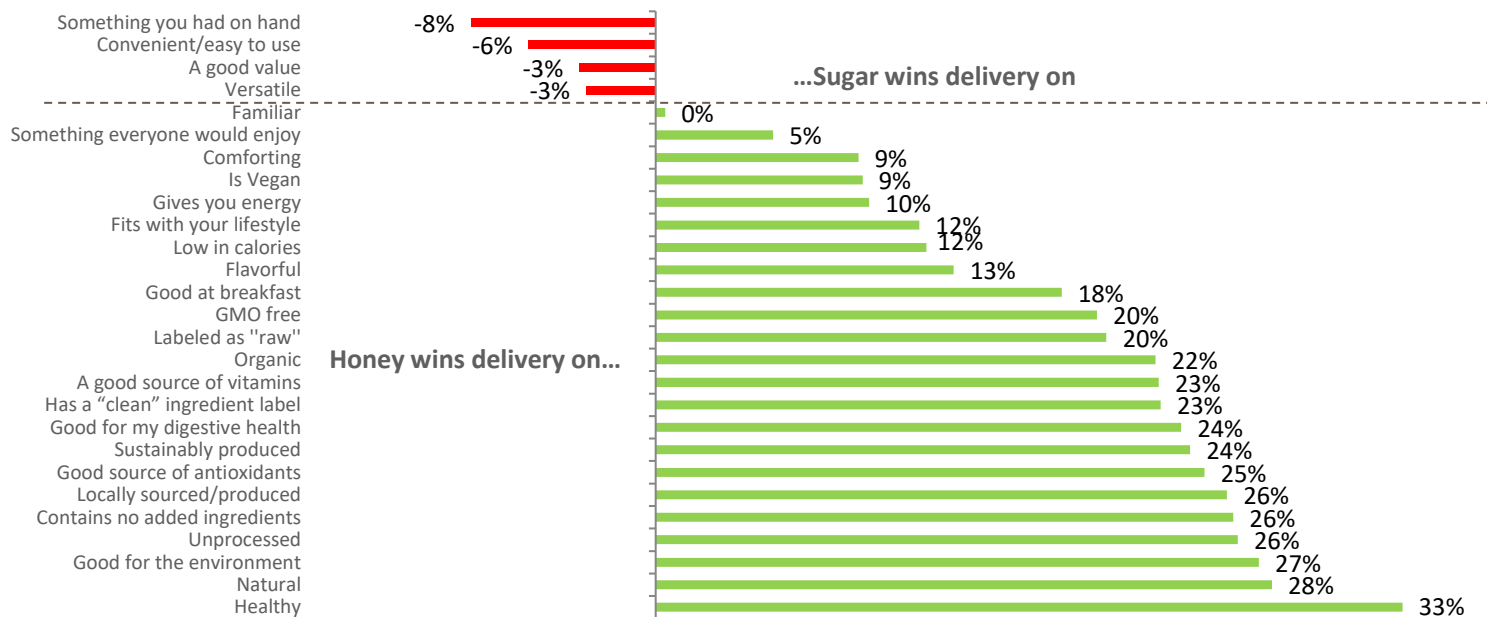


DELIVERY GAP HONEY VS SUGAR: Honey closes the gap vs granulated sugar

Delivery Gap – Honey vs Sugar (Among Those Selecting as Favorites)

Gap on Top Box Rating “Excellent”

(Q28 n = 489; Q29 n = 595)

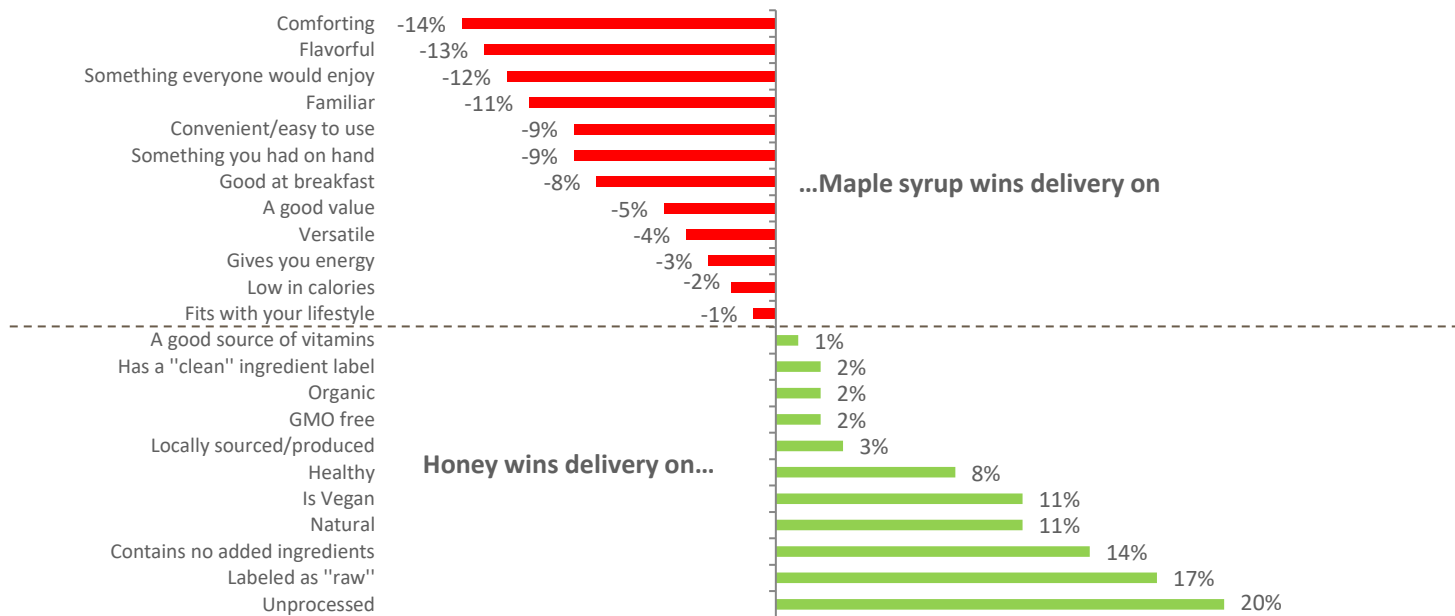


DELIVERY GAP HONEY VS Maple Syrup: Honey closes the gap vs Maple Syrup

Delivery Gap – Honey vs Maple Syrup (Among Those Selecting as Favorites)

Gap on Top Box Rating "Excellent"

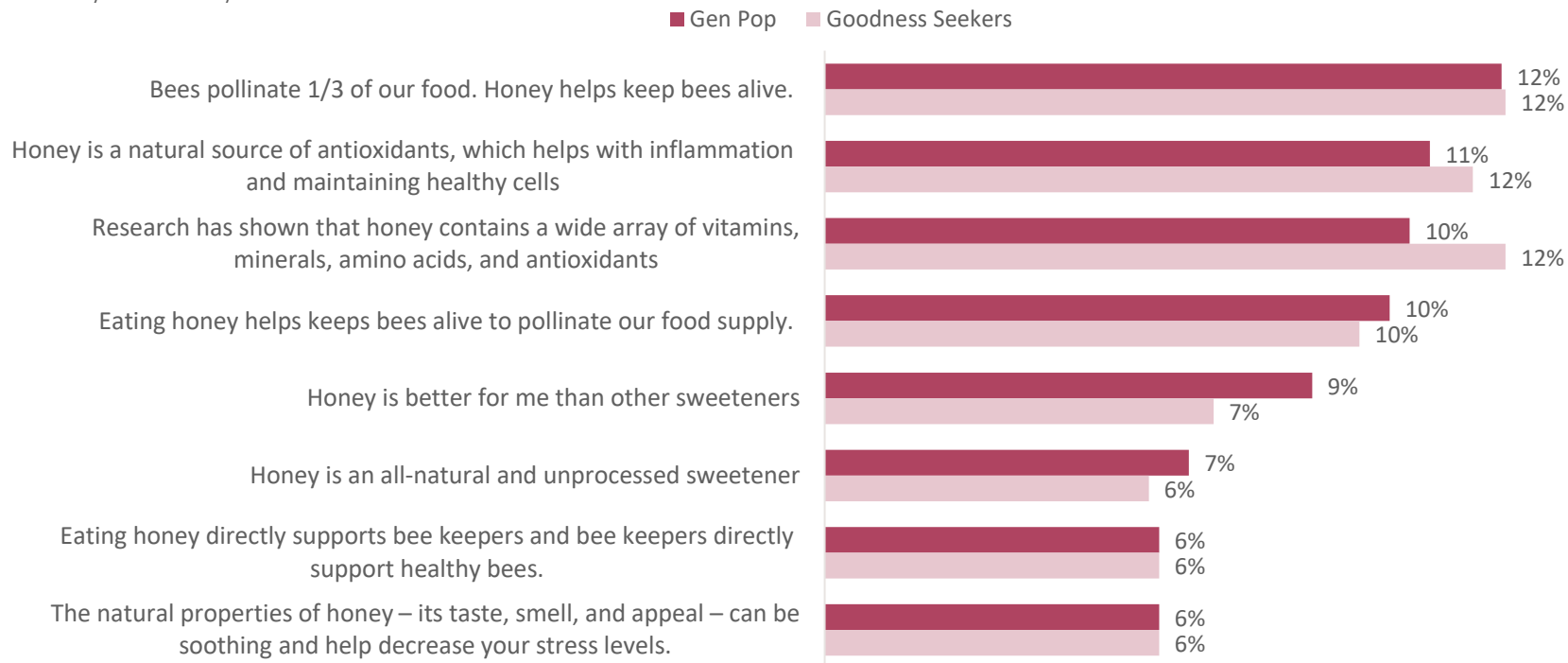
(Q28 n = 489; Q29 n = 593)



MOTIVATING STATEMENTS: Split between bee health and antioxidants

Single-Most Motivating Statement – Only messages with >5%

Sorted by Medium Honey Users

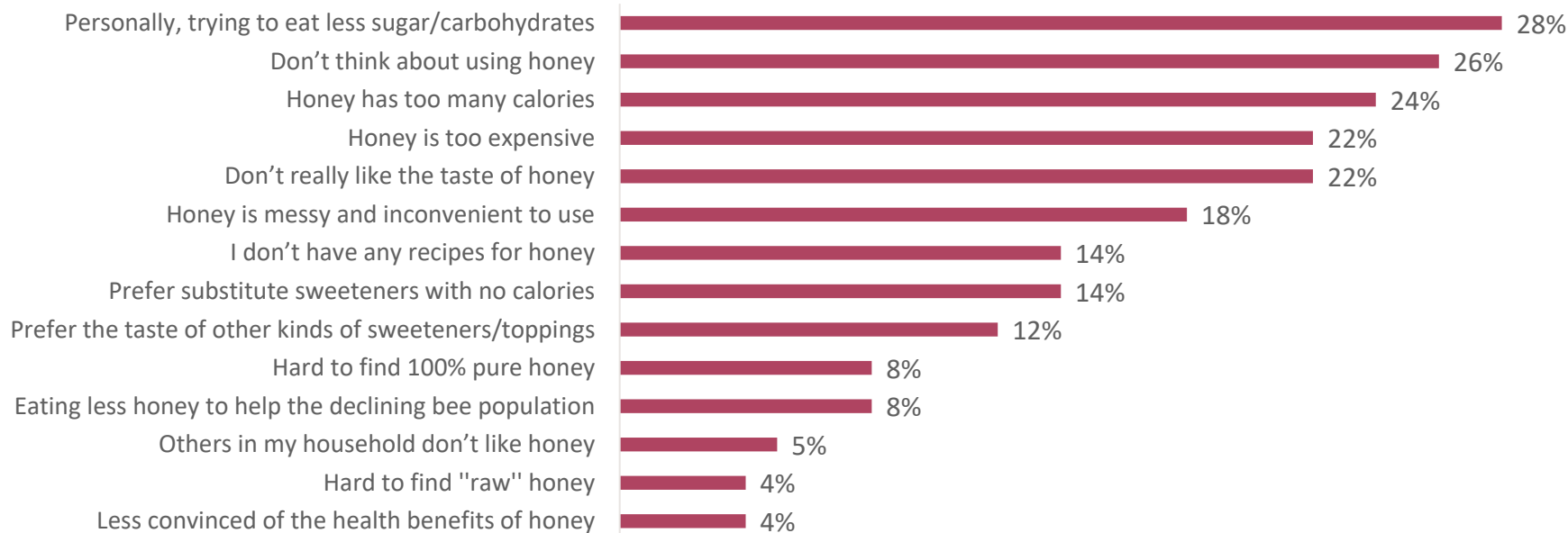


EAT LESS BARRIERS: Health, top of mind awareness, and price are the primary barriers to increased consumption

Barriers to More Frequent Consumption ("Eat Less Honey") - Nets

Aided, Select all that apply

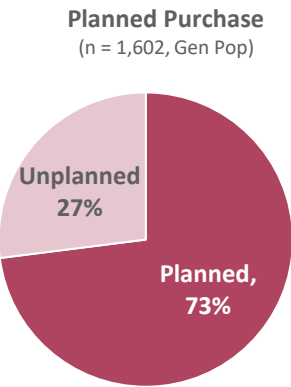
(n = 85)



The image shows several glass jars filled with golden honey, each with a white label. The labels feature a decorative floral border and the text 'HONEY', 'Raspberry', '16 oz.', and 'from Backyard Bees'. The address '5715 Gilkey Ave., B. Edison, Wa. 98032' is printed at the bottom of the labels. The jars are arranged on a colorful, patterned tablecloth. A semi-transparent dark grey banner is overlaid across the center of the image, containing the text 'Path to Purchase' in white.

Path to Purchase

PRE-SHOPPING: Most consumers say they plan their honey purchase

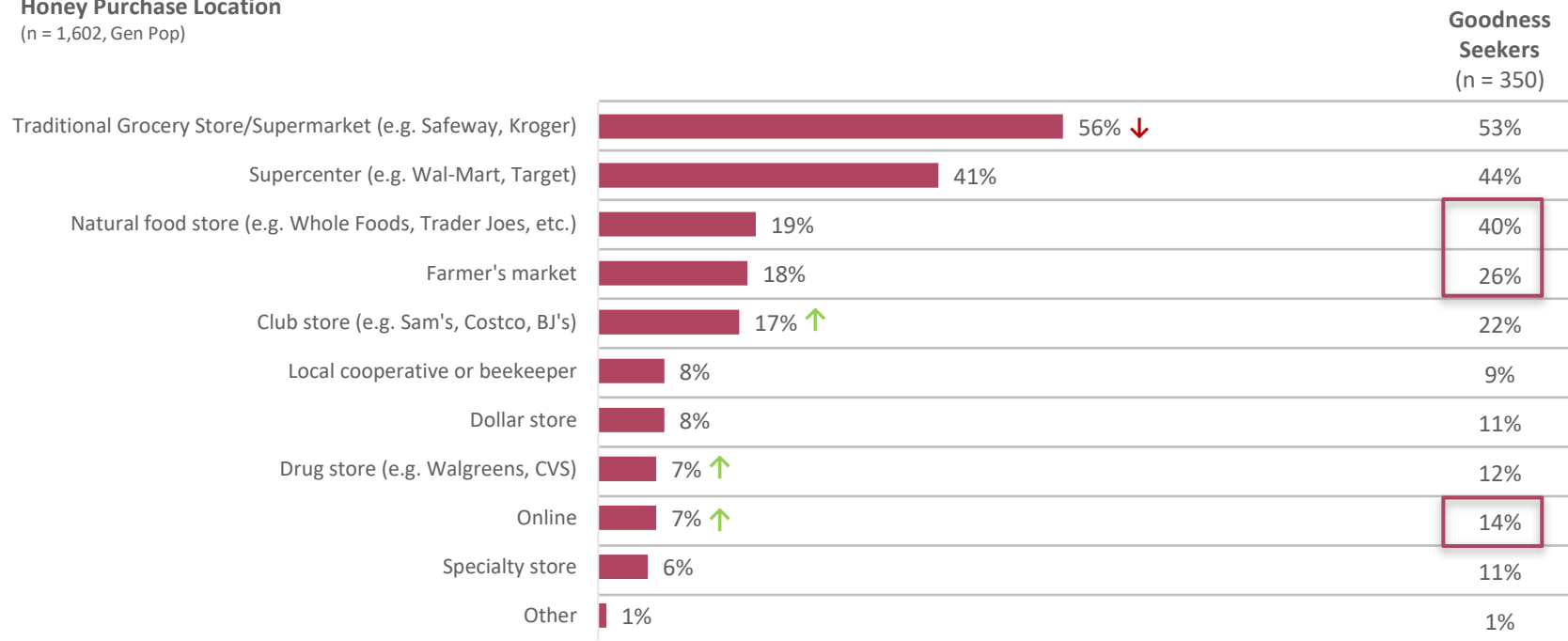


	Reason for Purchase (n = 1,602, Gen Pop)	Goodness Seekers (n = 350)
Restocking: I was out of honey and needed to replace it	51%	48%
Recipe: I had a specific use in mind and needed to purchase honey for it	23%	25%
Promotion: I noticed an attractive price or display on honey and decided to buy some	15%	11%
New variety/something interesting: I saw a new type of honey or something different that interested me	10%	16%

RETAIL OUTLET: Traditional Grocery still dominates the retail shopping

Honey Purchase Location

(n = 1,602, Gen Pop)



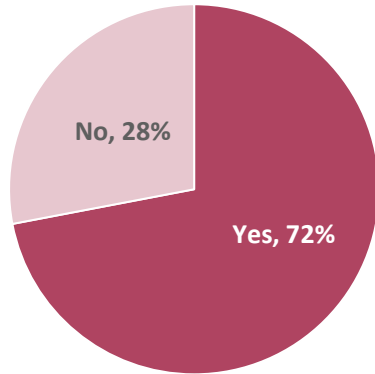


Sustainability Concerns

AWARENESS OF DECLINING BEE POP: Overall awareness is high but declining

Are you aware of the declining honey bee population?

(n = 2,000, Gen Pop)



Goodness Seekers (n=350):

Yes: 79%, No: 21%

Are you aware of the declining honey bee population?

Awareness of Declining Honey Bee Pop	2017	2018	2019	2020	2020 vs 2019
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Yes

Gen Pop (n = 2,000)	76%	73%	76%	72%	-4% ↓
Goodness Seekers (n=350)	-	-	-	79%	-

No

Gen Pop (n = 2,000)	24%	27%	24%	28%	4% ↑
Goodness Seekers (n=350)	-	-	-	21%	-

BEE HEALTH PERCEPTIONS: Some confusion with gen pop

Which of the following best describes your impression of whether using honey is good or bad for honey bees?

	2017 Gen Pop (n = 1,446)	2018 Gen Pop (n = 1,246)	2019 Gen Pop (n = 2,001)	2020 Gen Pop (n=2000)	2020 vs 2019
Very good for honey bees	34%	35%	21%	23%	2%
Somewhat good for honey bees	22%	23%	23%	24%	1%
Not good or bad for honey bees	17%	15%	17%	18%	1%
Somewhat bad for honey bees	6%	7%	6%	5%	-1%
Very bad for honey bees	3%	2%	3%	2%	-1%
Don't know/not sure	18%	19%	30%	27%	-3%



Consumer Focus Group Highlights

Taking Small Steps Towards Sustainability

Consumers continue to make small steps towards greater sustainability and responsibility in their own lives such as eating more plant based, recycling, looking for energy saving solutions, and limiting the purchase of plastic and packaging.

"I switched to a hair care brand that focuses on reducing their environmental impact and made their bottles recyclable, so I don't feel as bad about the waste I am producing."

"I do a lot of research on what's good for the environment and then which brands are committed to sustainability. I used to drink almond milk until I learned about the impact it has on the environment, so I switched to oat milk."



While concerned about bee health, there is little connection between honey consumption and bee health.

Most Goodness Seekers are aware of the declining bee population, however, there is not much connection between honey consumption and bee health.

When asked many people don't know whether consuming honey is good or bad for the bees or haven't spent much time thinking about it.

Typically, when pushed, **“it's probably good, I don't see why it would be bad”** is a common response.





However, health is prioritized over environmental concerns.

As Goodness Seekers are tuned in to environmental concerns, people prioritize their health and how it impacts the directly.

They will choose products that are **good for me first** and foremost and then good for the environment.

Sugar is bad, but naturally-occurring sugar is okay... in moderation

The avoidance of sugar (primarily white sugar) is top-of-mind among Goodness Seekers.

They are big on reading nutrition labels and avoiding products that are high in added sugar.

Natural occurring sugar in fruit is seen as okay, but still careful about the amount they consume – everything in moderation.



Honey is a favorite sugar “alternative”

Honey is not associated with bad sugar.

In fact, it is usually their favorite sugar alternative due to its natural nature, lack of processing, and perceived medicinal benefits..

“Maple syrup comes from a tree, honey comes from the bees, so to me they’re not as processed. They’re natural.”



**Prefer to purchase honey from farmer's markets
over the traditional grocery store.**

Organic, local, and unprocessed are the most important claims to these consumers when shopping for honey.

They are turning to local which is seen as better for you and is a feel-good purchase.

Goodness Seekers question the purity of honey sold at traditional grocery stores, and see local as a more trustworthy source.