



Identifying Packaging Opportunities for Honey

Qualitative Research Report

DECEMBER 2024





Project Objectives

The 2024 A&U study for National Honey Board surfaced consumer needs for convenience and ease-of-use, pointing to potential opportunities to optimize and innovate in honey packaging.

The National Honey Board engaged Hartman Group in qualitative research with honey users in order to

- 1) identify key motivators for honey usage and product selection within the world of honey,
- 2) surface any challenges and opportunities in current honey packaging,
- 3) and generate high-level ideas for packaging improvements and innovations with consumers.

Qualitative Approach

Hartman Group engaged users in an online exploration of the perceptions, barriers and opportunities for honey's on-pack messaging, claims and structural design.

These packaging opportunities were contextualized by exploring the role of honey in consumers' lives, product distinctions and notions of quality in honey, drivers for use and influences and trade-offs around product and brand selection.

Step 1: All participants used our custom online qualitative research platform to complete several, brief "homework" exercises to prime respondents to reflect on motivations, barriers and packaging perceptions of honey.

Step 2: We then conducted four, 90-minute online focus groups with these participants (5-6 per group) for in-depth discussion of attitudes and behaviors, response to product and on-pack messaging stimuli and real-time ideation of honey packaging opportunities.



This project engaged 21 consumers reflecting a diverse mix of light, moderate and heavy honey usage (defined by frequency, variety of uses), as well as a diverse mix of ages, geographic regions and ethnic backgrounds.

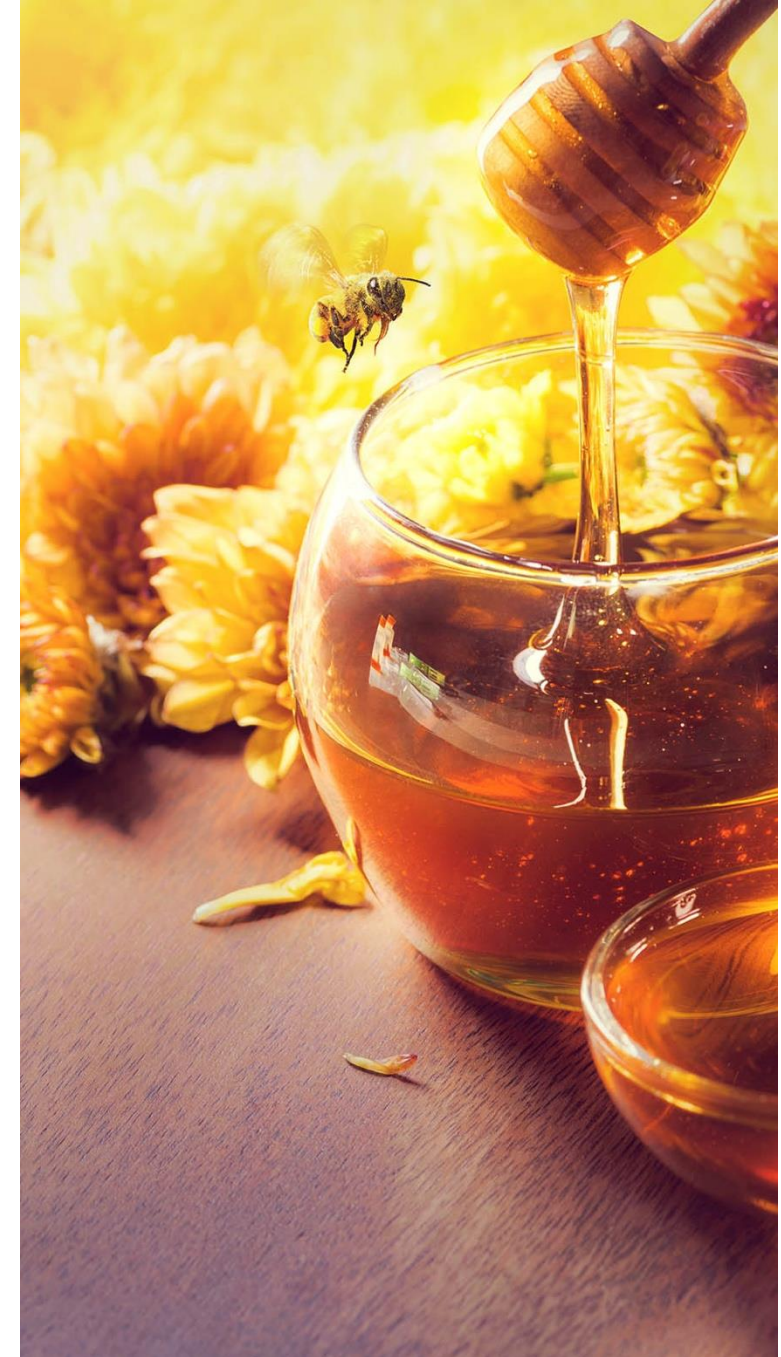
Users were recruited to reflect a range of attitudes about food & beverage, wellness, sustainability and cooking. We also ensured several consumers reflected attitudinal and behavioral alignment with NHB's prioritized segments, Natural Nourishers and (Young) Health Pragmatists.*

*not formally verified/typed into the segmentation

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Executive Summary

1. Although consumers enjoy an assortment of sweeteners, honey enjoys a distinct place in consumers' food lives that no other sweetener has. Honey's distinctness comes from its unique intersection with the aspirational benefits that drive consumers' pursuit of quality food:
 - The desire for **purity & health** and honey's status as a single ingredient food whose health benefits are derived naturally.
 - The desire for **flavor & experience** and honey's inimitable, nuanced flavor.
 - The desire for **authenticity & connection** and honey's place as nature's original sweetener, bound to the production of bees and the harmony of nature.
 - The aim for **sustainability & stewardship** and the belief that supporting honey translates to support of the environment.
2. Aspirational drivers for quality food are also balanced by functional, practical benefits which are compatible with honey, but which honey can at times be challenged to fully satisfy:
 - The need for **affordability**, yet the reality that some honeys can get impractically pricey for everyday.
 - The desire for **easy use**, yet the experience that using honey can be unwieldy and messy.
 - The desire for **versatility**, yet the fact that honey is often best suited for at-home occasions where specific tools and time are at hand.
 - The need for **accessible**, plentifully available foods, yet the challenge that the best honeys may be hard to find in certain geographic areas or mainstream retailers.
3. Optimizing honey packaging can engage aspirational benefits while resolving some of the trade-offs between practical needs. It starts with evaluating honey along **several touchpoints** and determining how specific **packaging features** within these touchpoints explicitly and implicitly connect to the benefits/drivers users are seeking in honey.

Executive Summary (cont.)

4. **Ingredients & sourcing** — particularly local and raw — is the most important dimension from which all other attributes follow.
5. Consumers can take or leave **product descriptions** that seem like fluff. Truly meaningful ones reinforce the purity of the core ingredient. ‘Romancing’ language does have its place, however, especially for the burgeoning flavored honey category.
6. Despite their formality, **claims & certifications** only have moderate impact on-pack. They’re most credible as a value-add to the most meaningful ingredient cues like raw, local or unfiltered but can be a bonus for products that don’t check those ingredient boxes.
7. From a quality standpoint, the **ideal structure** of honey packaging reflects the materials and forms most likely to be used by small, local purveyors: simple glass jars. Glass is seen as the most traditional packaging form for shelf-stable foods, while also reflecting contemporary desires for minimal environmental footprint, safety and purity. Although glass is king, many consumers crave format innovation in size, shape and functional features often reflected in plastic, making honey use more simple, engaging and versatile and potentially opening additional occasions.
8. With thousands of honeys on the market, the category has experienced commoditization. At the same time, a wide array of raw, unfiltered, organic honeys have flattened the category even within the high-quality tier. **Product Narratives** are important to tell the story of honey to distance the highest quality honeys from the lesser ones, as well as to create distinction within high quality honey and encourage consumers to explore the diversity of products within it.
9. **Design & graphics**, along with other visual and tactile touchpoints, are key to communicating product narrative. Imagery, especially the beloved bee, can add a touch of whimsy, visual interest and reinforce information or focus for a brand.
10. Ultimately, seizing on package opportunities is more than just activating on individual touchpoints. Because honey can be used as a flavorful ingredient, a medicinal remedy or a functional solution, honey lovers often have multiple honeys on hand at a given time. Understanding which packaging attributes and product trade-offs are most important for **various occasions/contexts** will be necessary for successful innovation against these various honey uses and developing multifaceted portfolios.



Cultural context for honey

In an endless sea of sweetness to choose from, consumers view honey as a fundamentally different kind of 'sugar'

Because honey is foremost thought of as a type of sweetener, users believe honey is something that should be consumed mindfully and even moderated.

That said, honey enjoys an **unparalleled halo that no other sweetener or sugar has**. People see honey as a better-for-you, if the not *the-best-for-you*, sweetener.

“

*Even though it's sugar and can contribute to weight, gain, and all that. But it has **so many benefits** for the body and your skin that I feel like I'm **doing something that's positive** for myself and my family by having it. And you know it tastes good like it's good for me.*

– Suzanne, 51

*To me honey is something that's like a **natural sweetener**. It's not going to give you that sugar rush, but it gives you something to cut your sweet tooth. It's a natural sweetener.*

– Richard, 67



Honey reflects many of the high-level, aspirational benefits consumers seek as they pursue quality food



Purity & Health

Minimally processed, clean and fresh ingredients produced in ways that seem real, not hyper-industrialized

It's about ...

- Feeling good
- Nourishing my body
- Aging well
- Prevention and health management



Flavor & Experience

Delicious foods that offer the expected, if not better, flavors and textures of food that is well-made

It's about ...

- Enjoying “real” food
- Comfort and happiness
- Inspiration and discovery
- Balanced indulgence



Authenticity & Connection

Foods that seem real, soulful and alive that offer meaningful connections with nature, people, and animals

It's about ...

- Discovering the story of food
- Personal relationship with food
- Locating people and places
- Makers who care and invest



Sustainability & Stewardship

Choices that give back and ways of consuming that consider its impacts

It's about ...

- Mindfulness
- Environmental preservation
- Respect for animals
- Care for the planet

In honey users' words: The pursuit of quality food



Purity & Health

"It's *simple ingredients*. It's ingredients *you can understand*. It's not loaded with GMO's and hormones and antibiotics, something that is *whole food*, maybe, or even *organic* and *processed sustainably*. I believe that it holds a lot more of its flavor and nutritional value."

– Sam, 30



Flavor & Experience

"I think *freshness* is really important, but I also don't want to just eat a salad every day. I want something that *tastes good* that takes care of my *satiety* needs."

– Joshua, 26



Authenticity & Connection

"I look for words like *authentic*, or *companies that I know how they make things*. I don't know if people know about Cabot dairy ... I've actually been to Vermont, *where they make everything*. You know, it's *like real farmers, family farms*."

– Camille, 59



Sustainability & Stewardship

"[Greater good] does come into consideration when I do purchase products, because I view that as *responsible stewards*. *Business choices*. I will not buy something if it is inefficiently packaged. If it's *wasteful packaging* I won't buy it."

– Matthew, 41



For many consumers, honey is not only compatible with, but uniquely and directly supports, these desires for quality food experiences



Purity & Health

Honey is inherently a minimally processed, single ingredient food whose health benefits are derived naturally.

It's association with nature, plants, bucolic settings, and all the color, biodiversity and nutritional properties therein, reinforce it as a pure food.



Flavor & Experience

Honey is sweet, with nuanced flavors and colors impossible to imitate and intriguing to discover.

Whereas artificial sugars can taste cloying and manufactured, the velvety texture and distinct sweetness of honey imparts a flavor that often enhances other foods and beverages.



Authenticity & Connection

Real honey is nature's "original sweetener," made by bees, not humans. Honey is also deeply connected to rituals, food traditions and even religious texts.

Harvesting honey requires a cooperative relationship between nature and humans. It offers users an opportunity to connect to place, landscapes and even the keepers who harvest honey.



Sustainability & Stewardship

Honey is the byproduct of the planet's ecosystem, and a gift from a food system when it's functioning naturally.

Users believe they are indirectly supporting the environment and bees themselves as they consume honey. As broader concerns about the environment grow, perceptions about honey may shift from a plentiful resource to a provision in peril.



In honey users' words: The uniqueness of honey



Purity & Health

"It gave me an opportunity to have something **sweet and not feel bad** about it. Because it's **natural**, you know, because it's **real**. It's not all sugar, processed, fake, loaded with things I can't pronounce."

– Suzanne, 51



Flavor & Experience

"**Honey has its own flavor**. I can't think of anything else that even comes close to how honey tastes. So it is a great product to **add to many of the foods** or baked goods to give it its **unique taste and flavor**."

– Spencer, 40



Authenticity & Connection

"Honey for me is always a little bit **nostalgic** in that sense. I remember my grandma having like a honey jar with, an **old-fashioned honey stir** and I was **fascinated** by it."

– Mary, 22



Sustainability & Stewardship

"I love that a lot of [honey products] are trying to help **bring awareness** to the importance of bees, how bees can help the **environment** and how us as consumers can help **bees thrive**."

– Kevin, 35

While aspirational benefits are important drivers for food, consumers are also balancing functional and practical needs



Affordability

Food & beverages that fit within budget and balance the needs for quality with price



Accessibility

Foods that are widely available, easy to find and accessible at mainstream channels



Ease of Use

Products and services that offer seamless use and minimize hassles that may arise with consumption



Versatility

Products that can be used in multiple ways, demonstrating broad value to experiential and practical needs

Most consumers are not dogmatic about what they eat and drink. Ultimately, they describe trying to achieve a balance across needs for health and indulgence; near-term affordability and long-term investment; and, personal wants and collective household needs.

What food and beverage choices and behaviors look like and the tradeoffs they make between the aspirational and the functional plays out differently depending on individual priorities, food values, knowledge, engagement with health and the needs of the moment.

Despite all the aspirational drivers motivating honey, at times products fall short on meeting functional needs

Experiential notions of quality such as purity, flavor, etc. are the most meaningful to consumers in terms of why they choose honey over other sweeteners, and drive perceptions of quality and comparisons between individual honey products.

However, functional drivers such as affordability, ease of use, etc. play a practical role as consumers evaluate the **benefits and trade-offs** between idealized honey vs. honey products that realistically meet their needs and daily occasions.

IMPLICATION

Honey packaging has the opportunity to both engage aspirational benefits while resolving some of the trade-offs between practical needs.

COMMONLY NOTED HONEY TRADEOFFS



Some honeys can get impractically pricey for everyday

*“Price definitely does play a role because **I can't afford \$20 honey**, that just seems crazy. With as many people as we feed honey **might have to take a downgrade** if the grocery budget's already been spent.”*

– Megan, 31



Honey packaging can be unwieldy and messy

*“Unless you have one of those little wooden honey things that you stick in the honey, I don't know what you use. But it **can be very messy and sticky**.”*

– Linda, 64



The best honey may be hard to find

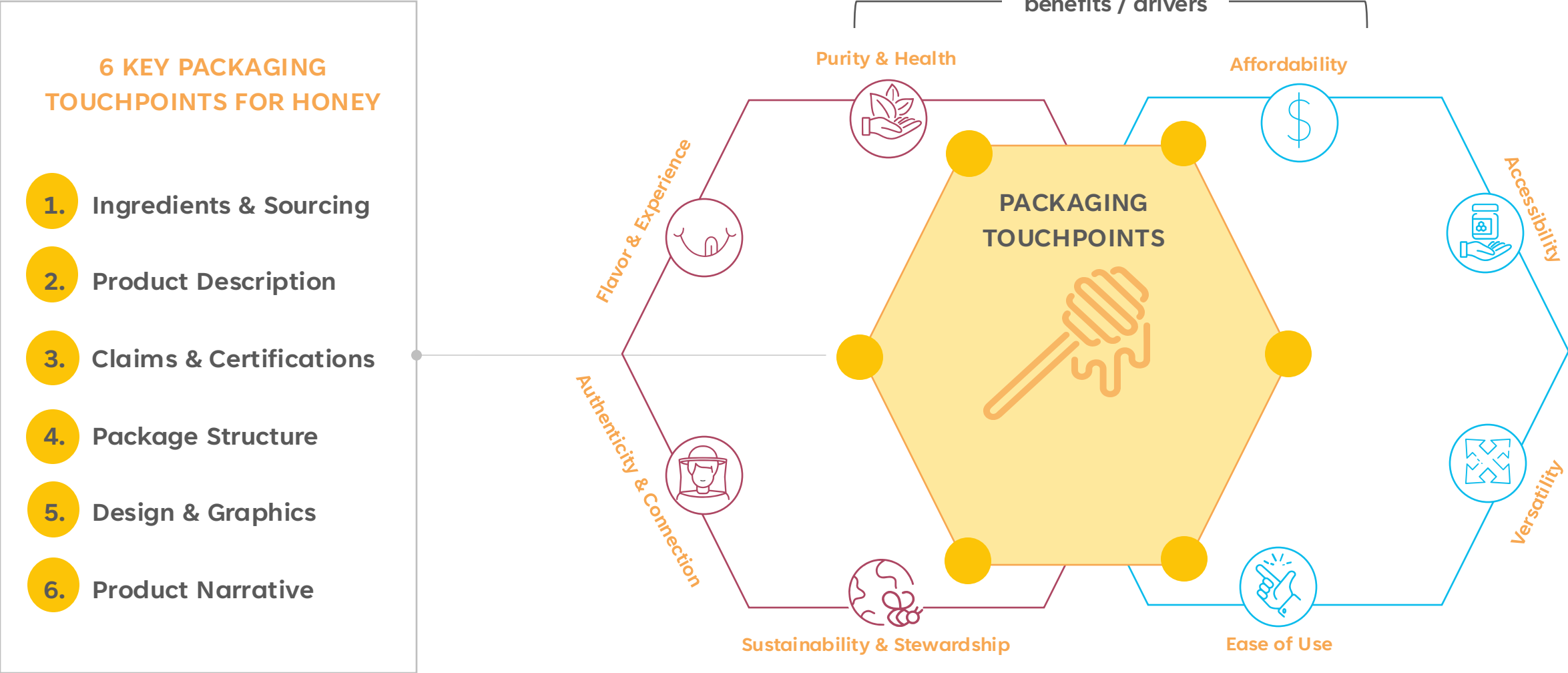
*“I used to trust 100% but I don't so much anymore. It's **hard to find**, at least here in Phoenix in this big city. You know I go to a farmer's market, but that's **not year-round**. I use honey a lot, so I like to have it **readily available**.”*

– Albert, 53



Packaging optimization touchpoints

Optimizing honey packaging should consider how touchpoints explicitly and implicitly ladder up to benefits and drivers for consumption and choice



Following is a deep-dive into 6 packaging touchpoints that surfaced as the most influential motivators for product choice



packaging touchpoints ↓ packaging features*	Ingredients & Sourcing	Product Description	Claims & Certifications	Package Structure	Design & Graphics	Product Narrative
	Fundamental ingredient properties and sourcing	Characteristics of the ingredients and production	Formal verification of ingredients, sourcing and production	Physical components of the package	Visual images and symbols that convey messages and “vibe”	Written story about the product and its benefits
	• <u>Local</u> • <u>Raw</u> • <u>Unfiltered</u> • <u>(Floral) Varietal</u> • <u>Flavored honey</u>	• <u>Pure</u> • <u>100%</u> • <u>Hand-picked</u> • <u>Crafted</u> • <u>Reserve</u> • <u>Infused</u> • <u>Hot</u> • <u>Spice level</u>	• <u>U.S. Grade A</u> • <u>USDA Organic</u> • <u>Non-GMO</u>	• Materials – <u>Glass</u> – <u>Plastic</u> • Shape – <u>‘The Bear’</u> – <u>Functional elements</u> • <u>(smaller) Size</u>	• <u>Imagery</u> • <u>Aesthetic style</u>	• <u>Purity & care</u> • <u>Preserve & protect</u> • <u>Founder’s righteous mission</u> • <u>Traceability & transparency</u> • <u>Specialization & craftsmanship</u>

See [Appendix](#) for a detailed deep dive on each of the above key packaging features and their role in shaping honey perceptions and product choice. Click on underlined text to navigate to the respective deep dive slide.

* Not exhaustive. Most influential elements as surfaced in qualitative research.

The most motivating features tend to center on core ingredients and communication, although package materials are also essential


Purity & Health


Flavor & Experience


Authenticity & Connection


Sustainability & Stewardship


Affordability


Ease of Use


Accessibility


Versatility

STRONG MOTIVATORS

Local	key benefits	tradeoffs
	   	 
Raw	  	
Glass	  	   
Flavored honey	   	   
Infused* Hot* Spice level*	  	  

MODERATELY STRONG MOTIVATORS

Unfiltered	key benefits	tradeoffs
	  	
Pure 100%	  	
USDA Organic Non-GMO	  	
Plastic	   	  
Smaller size	  	  
Product Narrative (Multiple genres)	   	N/A
Imagery (Multiple themes)	   	N/A
Aesthetic style (Multiple)	   	N/A

Less motivating features tend to be those where consumers have mixed reactions or lack of information about the true value such attributes bring to honey

 Purity & Health	 Flavor & Experience	 Authenticity & Connection	 Sustainability & Stewardship
 Affordability	 Ease of Use	 Accessibility	 Versatility

MODERATE MOTIVATORS

Floral varietal	key benefits	tradeoffs
	  	N/A
U.S. Grade A		N/A
Functional elements (pouch, nozzle, narrow spout)	  	   

WEAKER MOTIVATORS

The bear	key benefits	tradeoffs
	   	 
Hand picked** Crafted** Reserve**	 	 

**weak for plain honeys only; potentially strong for flavored honeys



Occasion relevance for packaging

Activating on packaging touchpoints should also consider the occasion relevance on which honey used

Individual packaging features and the benefits they cue have importance in their own right. However, package components *work in concert* to communicate what the product is, its positioning, benefits and ultimately **if it is relevant for certain uses and occasions.**



Users see honey’s versatility as unmatched, with potentially infinite uses



foremost ...

FLAVORFUL INGREDIENT

Honey is most frequently used as a sweetener in and on countless foods and beverages as an ingredient or condiment.

Honey appears in smaller amounts in daily staples and routine foods and drinks as well as in larger quantities for cooked dishes and specialty items.

“

My husband is very health conscious, so he uses honey instead of white sugar in his coffee, and I use it in my tea. My daughter loves honey, and like I said, it's always in our house. It's a staple and most mornings she has honey toast.

– Julie, 48



secondarily ...

MEDICINAL REMEDY ...

From anecdotal evidence to formal scientific validation, honey is a prevention and antidote for ailments of all kinds.

Honey serves as a go-to in the ‘home’ wellness toolkit for consumers across various wellness approaches (e.g., naturopathic and conventional)

“

I'm a singer so I always put a squirt of honey, because that's just the extra lubricant I need ... I do feel a sense of like an actual coating on my throat and vocal cords. It relaxes it a lot more and that's key.

– Kevin, 35



Increasingly ...

FUNCTIONAL SOLUTION ...

Illness aside, honey’s unique properties have made it a homemade solution to enhance and pamper oneself.

As part of traditional personal care rituals and newly discovered hacks, honey is seen as an ingredient for enhancing skin and hair.

“

“I use honey for cosmetic purposes. I have combination skin so I use honey to create a facial mask, and it always leaves my skin feeling sooth and supple. I just really love it. I also use it as hair conditioner.”

– Lorna, 64

Honey’s many uses offer consumers more reasons to simply have (multiple) honeys on hand. Furthermore, the health halo earned by its inherent functionality (among other health-aligned properties), make it seen as a more permissible form of sweetness, a healthful replacement for other sugars and a way to mitigate sugar intake overall.

Honey's diverse uses compels users to have multiple products on hand at a given time

THE MORE USES, THE MORE HONEYS ...

While a single high-quality honey can feasibly fill many, if not all, roles, people who use honey for multiple reasons often have multiple honey products on hand at a given time.

The heaviest users of honey are connoisseurs and collectors, looking to more nuanced properties of honey products to best serve the desired use, occasion or context.



“

I love the gradients of honey, so I have from the light version to the rich darkness of the honey. And you know, depending on what I'm doing, whether I am complementing it with an apple as an appetizer, as opposed to baking with it.

– Lorna, 64

While individuals may have general preferences, honey use/opportunity plays a big role in which benefits, trade-offs and attributes are prioritized



Consumers surfaced several occasions/contexts which shaped the “type of honey” they typically seek:

Work-a-day, staple honey

for the majority of daily cooking, sweetening, baking

“If it's purely for cooking or sweetening, *local is not as important*. It comes down to the fact that the local honey is significantly more expensive than I would buy at the store. I *still look for raw*, but the local aspect is not as important.”
– Matthew, 41

Healing honey

for treating common ailments using honey’s medicinal properties

“That for health purposes, for *allergies* and things like that, it's going to be more beneficial for us having *local honey* here from the Southwest versus honey from the Midwest, where different pollens, different trees, different allergens are out there.”
– Carol, 55

(Quick) snacking honey

for single-serve sweetening or tasting often on the go

“I do like the *minis*. They're *easy to take on the go*. ... and take around without having to take the whole product itself. I always liked doing that as a kid when we went to KFC and they had the honey packet.”
– Spencer, 40

Special treat honey

for times when you want to experiment or change-up the flavor

“The lemon whipped honey. It's *not my main honey*, but it's something to have maybe to put in my tea sometimes on a *special occasion*, or a *sweet snack* that I have on top of my regular honey.”
– Quiara, 36

Entertaining honey

for special occasions where you want to delight family/friends

I mean, it's *it's pricier*. But we bought *honeycomb* and we learned that you could put it on like crackers with cheese and stuff. It was more of like a *special occasion* kind of thing, because of the price, and it's in *smaller bottles*.”
– Julie, 48

Gifting honey

for a thoughtful present that’s personally curated and ensured to impress

“*Aesthetically* if you're like *giving it as a gift*. I would go for the glass one. If you want to *display it on your counter*, let's say you use a honey every single day, and it's just something that stays out kind of like *when people buy pretty like olive oil bottles*.”
– Nicole, 30



Parting thoughts

Parting Thoughts

1. **Keep the “why” at the heart of packaging innovations.** Messaging, design and format optimizations should ladder up to the drivers for honey — both aspirational and practical benefits.

As a starting point, honey companies must identify their most meaningful hook into the aspirational benefits — *purity, authenticity, flavor and/or sustainability* — and allow that north star to guide investments, messaging and design choice.

2. **In the world of honey, it all starts with ingredients.** And the emergence of *local* as the most motivating ingredient feature poses inherent challenges and opportunities for many companies.

Seeing the term “local” on front of pack is a helpful shorthand for buyers, but it is not entirely necessary to cue notions of *place*, particularly for products that cannot claim regional specificity. All honey products that can claim U.S. honey should proudly do so. Developing the “story” of U.S. honey as a whole should be an important strategic initiative that lifts all boats.



Parting Thoughts (cont.)

3. **Transparency (and traceability) is *the* unspoken attribute.** Part of what drives local, and many other attributes, is users' desire to know their honey and know the people (and the bees!) behind it. The more that producers can provide specific information about what, how, where, who and the why behind their products (in that order of importance), the greater sense of trust buyers will have.

The desire for transparency is also reflected in the structure and design & graphics that most often resonate. Design can visually convey the soul of the brand. While most users gravitate to clean, contemporary aesthetics as a visual representation of transparency, there's room for many different aesthetic styles and imagery to resonate for different reasons and occasions.

4. **Honey users want to use honey more!** Companies should consider how their entire portfolio can tap into multiple occasions through packaging formats, ingredient attributes and messaging features that target more specific occasions and contexts. In addition to interest in flavored honey, consumers are intrigued by all the possibilities for *using honey in flavorful ways*.

Engage this desire by providing more information on how honey can be swapped for other sweeteners in cooking and especially in baking, as well as its functional and medicinal uses. Honey users we spoke with repeatedly mentioned their interest in recipe inspiration, gifting ideas and helpful hacks. These are just some of the opportunities to bridge interaction beyond the package.





Appendix: Packaging features deep dive

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Click on underlined text to navigate to the respective deep dive slide (or from deep dives pages [back to start / this page](#)).

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How to read deep-dive slides

Packaging touchpoint that organizes various packaging features within it

Insights about the role the packaging feature plays in evaluations of quality, usage and product choice

Strategic implications as companies consider packaging optimizations

INGREDIENTS & SOURCING

Local has emerged as the most meaningful, universally appreciated on-pack distinction in honey

A HOLISTIC STORY OF HONEY

Local taps into symbolic, experiential notions of quality that honey users seek:

- Authentic connection to place – symbolically if not literally
- Trust and knowing where food has come from
- Building community
- Less industrialized production, with greater likelihood for product purity that comes the care of smaller-scale, personalized production with care

For foodie, wellness or sustainability-oriented honey users, local also cues objective, tangible quality:

- Flavors that reflect the topography and agricultural characteristics of their given region
- Economic investment in local producers, farms
- Fewer miles traveled between manufacturing and shipping, contributing fewer environmental pollutants
- Honeys that reflect the natural pollen and botanical sediments believed to offer allergy relief

IMPLICATION

Local offers a foundation upon which to tap into many other meaningful attributes and distinctions. As an uber symbol of both symbolic and objective quality, honey users link local to all 4 of the key drivers for honey use — purity/health, flavor, authenticity & connection and sustainability & stewardship.



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Benefits legend



Purity & Health



Affordability



Flavor & Experience



Ease of Use



Authenticity & Connection



Accessibility



Sustainability & Stewardship



Versatility

Rating of how strongly, moderately or weakly the feature *positively* resonates

Summary of the most relevant benefits gained and potentially traded-off by the presence of the attribute (listed in order left to right)

Quotes to bring the consumer perspective to life

Positive impact on perception:



STRONG

Most relevant benefits:



Potential tradeoffs:



"That's something that I look at because I'm giving back to a local owner. So you know, helping out the community as well ... It tastes like more rich because they're not doing so much process to make that honey."

— Quiara, 36

"I think a lot of it depends on how it's harvested or how it's raised. If one can say how the bees are taken care of I'm going to trust my local farmer just a tad bit more than like a bee farm. You know an industrial honey machine."

— Megan, 31



INGREDIENTS & SOURCING

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[Click to go back to start](#)

Positive impact on perception:



STRONG

Most relevant benefits:



Potential tradeoffs:



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Local honey has no single definition, although the closer to home the better

HOW LOCAL IS LOCAL?

- ✓ Adequate

From/made in the U.S. is the bare minimum. Thus, local can be invoked implicitly by stating “USA honey” or “made in the USA.”

Ingredient descriptors that indicate a blend of international honeys undermine notions of purity and are disqualified as local, although any presence of USA honey is seen as a positive.

While not considered local, country of origin (e.g., Brazil) is credited as a welcomed form of transparency.
- 👍 Good

Any specific U.S. state or region positively anchors honey to a known, domestic place and allows the honey to confer many of the associations of that region.
- ★ Better

“My region or state” takes this as step closer and begins to bestow many of the positive emotional benefits
- 😊 Best

“My close community” – or a short drive away – is the strongest and most literal understanding of local honey and serves as a dragnet for all the possible benefits (emotional, environmental, health, etc.) of local.

However, this often requires direct access to the farm/producer — most often made possible by local farmer’s markets — which may involve a tradeoff of time, cost, availability and convenient access.



“My preference is within 3 miles. But I have no problem with having California, Texas, Louisiana, any of those States within the United States that are honey producers.”

– Richard, 67

“Where I live, we have a lot of small roadside little huts that are set up. A lot of people are beekeepers, and you can buy local honey, which to me just seems to taste better.”

– Camille, 59

IMPLICATION



Honeys that can go from a more general sense of locale to adding assurances of traceability — even as specific as the farm or field — will receive the most credit and fully earn the trust and goodwill that come with the idea of local.

INGREDIENTS & SOURCING

Raw is foremost about purity and connects to additional symbolic cues

IT STARTS WITH RAW

While the term “raw” carries far more intuitive than objective notions of purity, users assume that a product must meet some sort of criteria in order to qualify as raw. At a minimum, raw symbolically means that it is “untouched” and objectively means it contains only one ingredient.

As a result of its rawest form, consumers believe all the taste and health attributes of honey are most accessible.

While consumers love the idea of raw, few have a technical definition for it. Only knowledgeable connoisseurs connect raw to specific production methods such as non-pasteurization and the way in which honey is spun from the honeycomb frames to the bottle.



IMPLICATION

Consumers romanticize the idea of “from bee to bottle.” And raw (especially when joined by the term “unfiltered” — see next slide) signal this to them more than any other attribute.

Positive impact on perception: STRONG

Most relevant benefits:



Potential tradeoffs:



“I would say raw is number one. I wouldn't buy it if it wasn't raw, and then local. Raw means it's minimally processed and its truest form, right? It's not further processed where it's heated and then it loses its nutritional properties.”

– Suzanne, 51

“Raw, is kind of like the equivalent of like from farm to table. I kind of feel like I'm not going to turn it over and it's going to say bioengineered in a lab. It's like pretty much from the bee to the bottle.”

– Jocelyn, 41

INGREDIENTS & SOURCING

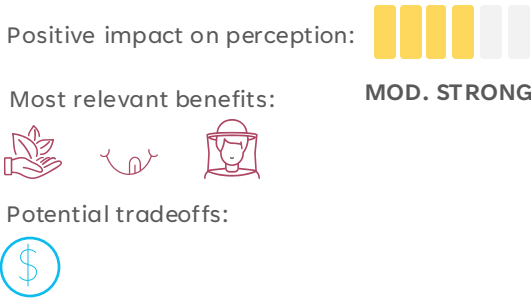
Unfiltered is interlinked with the concept of raw and reinforces the ideal of minimally processed

RAW & UNFILTERED: STRONG CORRELATION BUT NOT CAUSATION

Both raw and unfiltered ladder up to similar benefits of purity, taste and authentic production. However, people recognize them as different, if related, attributes.

Natural particles floating in the honey itself, especially bits of honeycomb, also provide a visual cue that can reinforce notions of unfiltered.

Users looking for raw honey usually expect and want it to be unfiltered — a signal that one less step has been done to the honey — maximizing its flavor and health.



“With the filtered, you lose some of the natural parts of the honey. So, having unfiltered has the pure 100% raw organic part of it, I guess.”

– Kevin, 35

“I'd rather go with 100% raw, unfiltered. Even if it has some kind of honeycomb in it. I love that texture, and it makes it just seem much more real and appealing.”

– Lorna, 64



IMPLICATION

While consumers assume that most raw honeys will also be unfiltered, RAW MATTERS MOST. Thus, on-pack messaging only states “raw” (and doesn’t have “unfiltered”) can still convey a sense of superior purity, provided it executes well on other attributes.

Honey **varietal** invites users to consider the sensorial benefits of honey's natural production

AUTHENTICITY AND ROMANCE OF HONEY

The inclusion of varietal descriptors on packaging is a subtle reminder of the authenticity of honey — that bees make it and they get their nectar from flowers.

Noting floral varietal not only provides more specificity about what has contributed to a particular honey product, but opens the door considering a variety of implicit and explicit attributes:

- Flavor: Subtle flavor notes, color and smell influenced by the flowers that were pollinated
- Place: Explicit connection to a type of flower in turn implicitly cues a sense of place
- Purity & health: While not explicit, varietal demystifies what has gone into the honey and that it came from real ingredients.

Terms like “multi-floral” and “mono-floral” are confusing to most people. While some users might decode their meaning and attribute some credit to the manufacturer for knowing something about the locale of the honey, the lack of specificity about the type of floral source is uninspiring and may raise more questions.



“They do it with coffee, so they should probably do it with honey. If this is from apple blossoms or something, compared to if it's taken from like alfalfa it'll have a different flavor profile. Absolutely that should be front of pack, especially if you know the source it's from.”

– Matthew, 41

Positive impact on perception:

Most relevant benefits:

Potential tradeoffs:

MODERATE

N/A

IMPLICATION

Companies can lean into the unique sensorial experiences different honeys offer by describing the flavor (and visual) properties (e.g., “herby”, “light”) of specific varietals.

Varietal notes are amplified by messaging around local and the ability to speak not only about the flower, but the field (both literally or figuratively).

INGREDIENTS & SOURCING

Flavored honey is about amped up flavor through the addition of culinary ingredients and processes

EXPANDING HONEY’S CULINARY USES

Flavored honey takes many forms — from bold, subtle, smoked or whipped, to the increasingly popular hot honey. Regardless of permutation, consumers think of flavored honey as having additional ingredients and/or production processes that add a flavor or texture different than would be present in a traditional honey.

Flavored honey almost exists in a different category than traditional honey, more akin to a condiment. A flavored honey is targeted to specific uses or dishes, making it inherently less versatile and potentially pricier than plain honey, but a worthy trade-off given the added convenience, unique flavor and new occasions it may inspire.

Because of the intentional focus on flavor, even the most fastidious honey users are likely to relax expectations around ingredient purity and authentic production. However, brands can imbue a different type of authenticity by building narratives based on culinary expertise or specific cuisines.

Positive impact on perception:

Most relevant benefits: **STRONG**









Potential tradeoffs:











“If it's possible, we like to find the flavored honeys sometimes. Flavored with something else. Whipped lemon honey, or I've had like a lavender honey before, which was surprisingly good ... but those are just fun opportunities.”

– Megan, 31

“I think in my head it almost acts as something separate, almost more like a condiment, I mean, frankly, if I'm eating a pizza from somewhere, I'm a little less worried about if the hot honey I'm putting on top is like the very best for me.”

– Mary, 22



IMPLICATION

Flavored honey is an intuitive line extension for reputable honey brands that already have established deep credibility for plain honey. While flavored products need not reflect the same “purity tests” of other honeys (raw, unfiltered, etc.) narratives anchored in the love of honey and building on its already unequalled flavor are a starting point.

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PRODUCT DESCRIPTION

The terms **Pure** and **100%** are a reassurance of what users believe honey should be

ONE OF THE MOST COMMON DESCRIPTORS OF HONEY

Consumers are increasingly wary that honeys on the market may have been watered down or mixed with cheaper ingredients such as corn syrup. The result is a compromise in taste and texture and undermining the medicinal and functional benefits of honey and desire for less-processed.

Although users don’t believe that the term “pure” is regulated, they believe it is a far more credible term than “natural.” At a minimum, pure means that honey is the one and only ingredient. In conjunction with other descriptors such as raw, unfiltered, etc. the word pure is more substantive.

The term “100%” functions interchangeably with pure, although both terms are occasionally used together. The benefit of 100% is that it requires no interpretation and is a more resolute affirmation of honey’s purity.



IMPLICATION

Pure and/or 100% are a value-add to any genuine honey product that bears those descriptors. Moreover, these descriptors are essential for honey products that cannot claim ingredient signifiers such as raw and unfiltered, terms that benefit from pure/100% but which are usually sufficient reassurances on their own.

Positive impact on perception:

Most relevant benefits:

Potential tradeoffs:

MOD. STRONG



“I’ve seen other sugars and flavors and things added into honeys before. I would love to be able to turn over the bottle, or even just look from the front of the bottle and see something that says ‘a hundred percent honey’ or ‘just honey’ or something along those lines.”

– Sam, 30

“You can taste the difference in the 2 — the honey that is mixed with the corn syrup as opposed to the natural honey. You can taste the artificial sweetening as opposed to when you drink the honey from the beehive.”

– Lorna, 64

PRODUCT DESCRIPTION

Words like **crafted**, **hand-picked** and **reserve** seek to separate well-made honeys from commoditized ones

ROMANCING THE PRODUCTION OF HONEY

Many higher-end honey brands invoke production and sourcing narratives by incorporating subtle descriptors about the honey itself or those who produce it. A few of the descriptors that surfaced most in this research included “hand-picked,” “crafted” and “reserve” although any number of other descriptors exist (“foraged”, “harvested”, etc.).

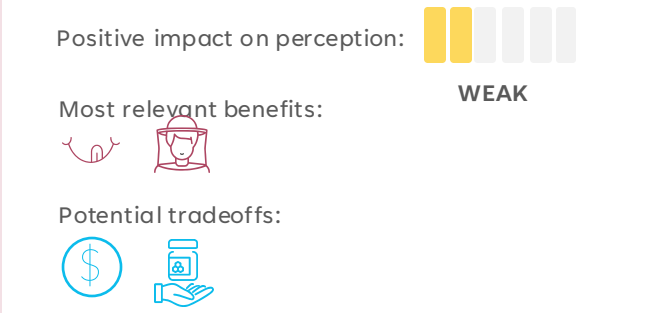
Typically, such descriptors have a neutral impact as a front-of-pack tactic. This is because consumers see the bees as the real heroes of honey — especially when it comes to plain honey. Users believe that at most, the role of human is to be selective about where they are sourcing honey from and minimize any disruption in their transfer from the “bee to bottle.”

Words like “crafted” and “hand-picked” place the focus on the people producing honey. And on the rare occasion they are noticed, users may not know what they truly mean. They may raise questions about what the manufacturer is doing that is different than time-tested, authentic honey-bottling process. Deeper communication off-pack is likely needed to tell a story of true differentiation.



IMPLICATION

Provided the ingredient cues that matter most to consumers are present, additional product descriptors can add flair to products. However, most consumers see these terms as a branding play that signals a product as more specialty and not commoditized, rather than providing substantive quality distinction.



“[Crafted] makes me think it's mixed for that particular flavor they're looking for like like they do with whiskeys or wines. They're blended with different ones to get the flavor they're looking for ... You know it could be very different than what honey truly tastes like.”

– Albert, 53

“‘Handpicked from the best barrel’... That's bluff. That's marketing. Because what they do with the rest of the barrels of honey? But you had all these other barrels. So, it's just fluff.”

– Matthew, 41

PRODUCT DESCRIPTION

Linguistic and visual cues like **infused** or **spice level** are welcomed descriptors — for flavored honey

CLARITY AND ENTICEMENT AROUND FLAVOR

In contrast to plain honey, descriptors that center the human makers/brands of honey are most meaningful in flavored honeys. In the context of flavored, honey users embrace the role that food lovers play in building on the natural flavor of plain honey with additional techniques and ingredients. Perhaps ironically, words like crafted, hand-picked and reserve are strongest in this context (see prior slide).

Words that invoke culinary language are especially relevant. For example, a word like “infused” (with a certain kind of chili, lavender, etc.) may be a way to describe a less-processed way of imparting flavor vs. adding artificial flavorings.

As the world of flavored honey is introduced to more people, honey users also need cues that help predict what a given flavored honey will taste like and if it fits their preferences. In the burgeoning hot honey category, knowing just *how hot* it is and what ingredients produced that heat level can support convenience and help tell a more authentic story about flavor.



IMPLICATION

Descriptions around flavor need not be long or overly complex. Simple linguistic and visual clarifiers around flavors can help honey users decode what the taste experience will be and even unlock inspiration for how they can use it in their eating and cooking occasions.

Positive impact on perception:

Most relevant benefits:

STRONG

Potential tradeoffs:



“I'm gonna be looking for flavors which I've never tried. And as long as it looks like honey, and it doesn't look like a candle, I think I'm gonna give it a shot.”

– Troy, 52

“It has that hot honey. I'm interested in trying with the chili in it, Now I'm curious. But yeah, without trying it you don't know.”

– Richard, 67

CLAIMS & CERTIFICATIONS

U.S. Grade A offers a baseline of quality control

A UNIVERSAL STANDARD

Consumers assume that the presence of “U.S. Grade A” means that a product has passed the bare minimum standards for foods and beverages to be sold in the U.S.

The ubiquity of Grade A across various product types has made it recognizable and somewhat trusted. Likewise, it has made it non-specific to honey, nor speaking to the any of the most important quality cues in the honey category. As a result it is non-offensive, but flat as a driver for purchase.

For products that cannot claim made in the U.S., Grade A may be a positive designation that offers an assurance of oversight. However, if juxtaposed with other non-U.S. country of origin labeling (from Bazil, Mexico, etc.), this may erode its credibility as a quality symbol, particularly in honey.



IMPLICATION

Manufacturers that cannot lean on their brand halo or claim other descriptors of ingredients and sourcing, should incorporate U.S. Grade A to hedge off potential questions about safety and quality.

Positive impact on perception: 

Most relevant benefits: **MODERATE**


Potential tradeoffs:
N/A



“The U.S. Grade A, it's nice to be on there. But it's not on any of the quality-looking ones. I think it's just something to make you wanna buy the cheap one even more.”

– Troy, 52

“I don't know what the FDA standards are. It doesn't necessarily have anything to do with quality. It just checks off the boxes on the list for the FDA, and then below that what I can read is a product of Argentina, Canada and United States.”

– Matthew, 41

CLAIMS & CERTIFICATIONS

USDA Organic and Non-GMO are relevant purity cues, but their significance varies among honey users

PURITY AND PRESERVATION

While organic and non-GMO have become codified symbols of purity in food, consumers have also come to interpret their importance on a category-by-category basis. While associations with organic are always positive, consumers have varying (potentially incorrect) understandings of what organic means in honey:

- A catchall to describe less-processed honey and may be synonymous with raw or unfiltered
- Specific growing practices and the environment that bees are exposed to, making it fundamentally important to the purity and eco-friendliness of the honey

At the same time, consumers think of honey as a somewhat wild product. It arises from a vibrant ecosystem that humans play a role in but that is ultimately controlled by bees. Some users question to what extent manufacturers can direct which plants the bees pollinate, and furthermore how big of an impact organic/non-GMO has on honey quality.

IMPLICATION



While organic and/or non-GMO honey provide a positive bump in quality perceptions, consumers need more education about its meaning and legitimacy in honey. Organic is most importantly a secondary motivator or a value-add to other claims. But in the absence of raw or unfiltered, organic or non-GMO may provide a welcomed assurance of purity, especially if it's a stand-in for those attributes among less educated honey users.

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Positive impact on perception:



Most relevant benefits:

MOD. STRONG



Potential tradeoffs:



“So organic is just the way it comes out. Nothing's been added. It hasn't been heated, hasn't been filtered. That's kind of my take on organic.”

– Kevin, 35

“I am more likely to look for organic. Probably the land that the bees are coming from is not sprayed with a lot of pesticides and things like that.”

– Mary, 22

“It's practically impossible to ensure that the bees are only collecting pollen from organic food sources. I mean, technically, there's probably things that they have to follow in order to fall into that. But there's no way to actually control the bees.”

– Matthew, 41

PACKAGE STRUCTURE

When it comes to quality, the **glass jar** is king

FOR THOSE MOST SERIOUS ABOUT PURITY

Glass is seen as the honey’s traditional packaging with proven benefits across many aspirational drivers:

- Minimal environmental footprint with 100% assurance of recyclability
- Promoting minimal waste via reusability
- Authentic and nostalgic as it reflects traditional packaging methods
- Elegant appearance of glass cuing specialization, rather than the perceived overabundance of plastic
- Literal transparency allowing complete visibility to product color, unfiltered bits and even viscosity
- Symbolic transparency about the safety of glass ingredients and ability to avoid plastic leeching

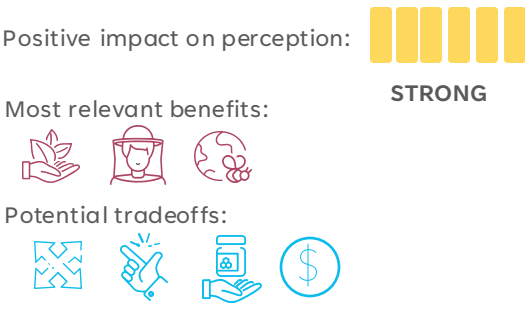
All users concede a loss of functionality with glass (a loss some users are willing to take): Limited portability, less storage flexibility, inherently smaller sizes and greater potential for mess during and after use. Furthermore, because many quality honeys are available in plastic, glass has become more rarefied at conventional retailers. This is both a positive and negative: it is further associated with the highest quality, but may be less available, more niche and for the most expensive honeys.



IMPLICATION

Companies that wish to command a price premium may do well to be packaged in glass, to help warrant the cost in consumers’ minds. Manufacturers that are able to find functional innovation while retaining the trust and appeal of glass will allow their honeys to sit in the best of both worlds — authentic quality and purity meets usability.

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“Packaging is also really important to me, mostly because I want to avoid the plastic. But I also want something that is reusable in some format. So I like the glass packaging.”
– Megan, 31

“I don't like honey and stuff like that in plastic containers. And it's got a plastic top and over time the plastic can seep into the honey which I don't like. I think all honey should be in glass jars.”
– Danielle, 57

PACKAGE STRUCTURE

The practical benefits of plastic packaging have made it ubiquitous in almost every honey users' pantry

FUNCTIONALITY FOR EVERY OCCASION

Honey in plastic containers is pervasive, including among users who say they prefer glass on principle. This is because users primarily evaluate honey based on its ingredient, production and certified credentials and most are willing to accept a quality honey in whatever packaging format it comes.

That said, when packaging considerations do come to the fore, consumers often concede that plastic bottles can resolve some of the pain points of glass jars:

- Lighter weight packages that are easier to handle
- Screw-tight and flip-top lids for ease and less mess
- Squeezable packages that are cleaner to quickly squirt or precisely measure (without other kitchen tools)

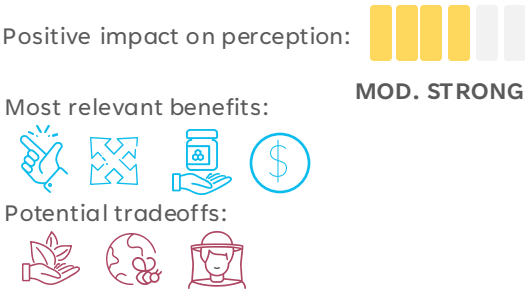
But plastic is not without its drawbacks and critics. Leaching of micro-plastics, environmental pollution, failure to recycle plastics lead the most tangible concerns. Furthermore, unease with hyper-manufacturing, mass-consumption and plastic's juxtaposition to the authenticity, tradition, and specialness of honey cause plastic to be seen as a trade-off in quality.



IMPLICATION

Plastic is a deal breaker for a small number of consumers and a reasonable trade-off for most — especially with the more valid quality attributes about the honey that can be claimed on pack.

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“Plastic makes it a lot more functional. I like scooping, but my kids scoop and then just dump and then it spreads. So sometimes that squeeze bottle is a lot quicker and easier, especially packing lunches before school.”

– Spencer, 40

“I think the glass package is the most aesthetic and felt most quality. But I think the plastic packaging feels most practical. Especially with so many girls in their twenties [at my house], in and out of the kitchen all the time. I think that that feels the least messy.”

– Mary, 22

PACKAGE STRUCTURE

The iconic **honey bear shape** is liked by some but often registers as passé

NOD TO NOSTALGIA

The bear is one of the most recognizable types of CPG packages that immediately triggers associations with honey. While many things can come in a glass jar, users associate no other product with the bear package.

The honey bear invokes a sense of playfulness due to the appearance of the bottles themselves, associations with childhood, classic characters and all creatures’ universal love of honey.

Whereas glass jars are associated with the highest quality honeys, consumers note that the plastic bear is commonly used for cheaper, lower quality honey products which has created a “horn effect.”

That said, some high-quality honeys do come in the bear-shape package and therefore straddle the line between nostalgia and current-day expectations around quality.

Positive impact on perception:

Most relevant benefits: WEAK









Potential tradeoffs:







“I just remember growing up watching the adventures of Winnie the Pooh and his buckets of honey. They looked so delicious.”

– Kevin, 35

“It comes in these little cute bear containers and when I was a kid we used to play with these cute bear containers after the honey was gone.”

– Matthew, 41



IMPLICATION

The plastic honey bear is surrounded by a love-hate debate, as people increasingly look for contemporary signals of quality that may challenge familiar, if well-loved, product forms. Although the bear has fallen out of fashion for the honey users most focused on quality, the bear may be differentiator for brands that wish to purposefully invoke a sense of nostalgia and playfulness in a sea of other plastic packages and glass jars.

PACKAGE STRUCTURE

A wider range of **shapes** support **functional** use and can create differentiation

SHAPES OF STRUCTURAL FEATURES SPARK NEW OPPORTUNITIES

Despite thousands of honey packages on the market, most fall into roughly the same bottle/jar shape that has proven functional for most consumers. As honey uses expand and packaging becomes more innovative, honey users note packaging features that further extend versatility of uses:

Most liked



Mixed reactions



New idea



Pouches:
Even more squeezable, allows more honey to be used up, storable upside down, requires less packaging material

Nozzle tips:
Creates targeted splashes of honey when used as a condiment, tiny opening limits functionality

Narrower bottles and openings:
More ergonomic, providing a cleaner pour and potentially borrowing inspiration from specialty food categories

“[One of them] had one [capped] at the bottom, and that would seem easier to use much like ketchups and mayonnaise and mustard today in smaller amounts.”
– Richard, 67

“I have had experience with the [nozzle] top. It's good for the drizzle but then that sometimes gets stuck.”
– Suzanne, 51

“If it had to be glass maybe if the bottle was shaped more like a hot sauce bottle like that way, I'm not pouring out of a wide lid, but rather pouring out of a smaller spout.”
– Mary, 22

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Positive impact on perception:

Most relevant benefits:

Potential tradeoffs:

MODERATE





IMPLICATION

Package format innovation has the potential to reduce the barriers of use for honey. This is especially true for plastic packages, although some tweaks could be relevant for glass too.

Manufacturers must walk a fine line, since consumers raise counterpoints for every potential new feature. In addition, innovation that moves too far away from associations with the honey category or into down-market associations can undermine quality.

Need for greater **size** variety reveals an opportunity

GAP IN HONEY PACKAGING

For regular honey users, 12 to 16-ounce packages tend to fill the sweet spot for most household uses. While occasionally the need arises to go bigger for large-scale baking projects, more often consumers describe several reasons for *smaller* packages of honey:

- For less frequently used honeys, ensuring they remain fresh and don’t crystallize
- For times when users want a single-serve, standalone dollop of honey
- For on-the-go, allowing them to have a treat on hand or using their preferred, quality honeys at food-service and other away-from-home contexts
- For sampling and experimenting on a one-time basis or before committing to larger quantities or more expensive offerings

The old-school honey sticks are infrequently bought, but a potential solution for some of these scenarios, although additional format innovation for single and fewer multi-serve quantities is needed.



IMPLICATION

One size doesn’t fit all in honey. There may be an opportunity for honey sticks to make a comeback while also developing other small-scale packaging that is convenient, engaging, and environmentally conscious.

Positive impact on perception:

Most relevant benefits: MOD. STRONG

Potential tradeoffs:



“There's quite a few places that have like honey sticks, and so that's a spot where I'll try like fun flavors.”

– Mary, 22

“And when you go to some restaurants or nicer hotels, they have the little jars of honey. Like we were just in Colorado, and you could try 10 flavors. And this was a place that made honey. But it was their idea of, you know, being able to have a sampling of all the different flavors.”

– Linda, 64

On-pack **imagery** can create a shorthand for the brand's key point of difference

Consumers mostly want honey to speak for itself and tend to appreciate a more restrained approach to design. However, imagery etched directly onto the package structure (liked the most) or incorporated onto the label can add a touch of whimsy, visual interest and reinforce information or focus for a brand.

CONSUMERS NOTED SEVERAL IMAGES THAT RESONATE AND THAT CONJURE IMPLICIT ASSOCIATIONS

(listed in order of most appeal)

Most used and most liked



Bee



whimsy, cuteness, vibrancy
natural production
environment



Founder



a real person
personal story
care about quality



Plant imagery



natural source of nectar
special, additional flavor
beauty of plants



Beekeeper



traditional makers
reminiscent of the farm

Positive impact on perception: 

Most relevant benefits: **MOD. STRONG**
 *Varies by execution*

Potential tradeoffs:
N/A

“I picked this one [as my favorite] because it has an actual name of a company ... It has some of the stereotypical bee stuff. You know a picture of a bee at the honeycomb on the top that catches your eye right away.”

– Spencer, 40



IMPLICATION

Bringing it all back to the bee and the honey itself is the most winning approach, although images that reinforce true points of uniqueness for a brand (e.g., it's founder, flavors, etc.) have an important role to play.

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Many **aesthetic styles** in honey resonate but most gravitate to a clean and modern approach

Multiple design elements — imagery, color, font, package materials and structure — collectively create the aesthetic feel of package. While this research’s objective was not to dissect various design features, the important role of overall aesthetic appeal and its role in reinforcing quality and product positioning cannot be ignored.

As consumers described which honey packages and products appealed to them, they noted several aesthetic approaches that tended to evoke associations with drivers and benefits of usage and influenced overall appeal:

- Clean & Modern
- Creative & Homey
- Simple & Bold
- Sophisticated & Traditional
- Nostalgic



CLEAN & MODERN AND WHY IT RESONATES

- Emphasis on transparency, lots of whitespace
- Simple lettering/font style
- Restrained use of text on front of pack, primary emphasis on product attributes
- Use of glass jar
- Simple lines to package structure: slightly slim jar rather than squat/mason jar
- Distinctive, simple logo that draws on compelling imagery (see prior page)
- 1 or 2 subtle bespoke touches that create refinement



“The logo evokes the most positive emotions. Their jar is also nice. All together the product looks delicious, professional and welcoming.”

– Suzanne, 51

“That one felt very clean because there wasn't a lot to draw your eye on the label. And I like simplicity. So I appreciated that. So I would want mine to be probably like in a Mason jar, very minimal label that says the important stuff but doesn't distract from the actual product.”

– Megan, 31

Positive impact on perception:

Most relevant benefits: MOD. STRONG

Varies by execution

Potential tradeoffs: N/A



IMPLICATION

With many successfully aesthetic avenues, not all brands should aim for the same style. However, the positives associated with the clean and modern approach may serve as helpful best practices that other styles can tap into while creating their own visual identity.



PRODUCT NARRATIVE

Narratives tell a story of honey and communicate the product's/brand's their reason to be

Positive impact on perception:

Most relevant benefits: MOD. STRONG

Varies by execution

Potential tradeoffs:

IT ALL LADDERS UP TO NARRATIVE

All components of a package are part of narrative – claims, certifications, product descriptions, and particularly the elective package elements like design and even product name. While some of these pieces speak for themselves, additional linguistic descriptions tell a story about what the product is and how it came to be.

This intentional crafting of written product lore — sometimes brief and subtle, other times lengthy and explicit — help to position brands in a plethora of honey manufacturers and communicate a reason to be. Elements of such narratives can appear on front of pack via tagline. More often, though, the limited real estate means more extensive written narratives are found back of pack. As a result, narratives have less impact than other packaging features when consumers need to make snap judgments about the quality of honey. However, they can play a critical role when consumers are evaluating the product for the first time, exploring for enjoyment, or on high-stakes occasions.

CONSUMERS NOTED SEVERAL MOTIVATING NARRATIVE THEMES

While different narrative themes tap into various benefits of honey, users assume most of the themes require a tradeoff in price and/or accessibility

Purity & Care



Clean, pure honey the way nature intended

Preserve & Protect



Caring for bees and our planet for the love of honey

Founder's Righteous Mission



Passion for honey and commitment to quality

Traceability & Transparency



Clear sourcing, integrity and absolute assurance

Specialization & Craftsmanship



Artisanal quality and crafting unique honeys

PRODUCT NARRATIVE

Honey inherently has a story, perhaps making lovers of honey even more receptive to on-pack narratives

Consumers love honey and find enjoyment in learning more about it. Furthermore, they feel trust is being eroded as highly processed foods, including honeys, are insidiously masking themselves as the real thing. The ability to hear more information and connect emotionally to products is especially welcomed for honey.

“Being able to know exactly where it came from. You know exactly what ingredients, exactly where it came from and if any mishaps happened in between. You might not know where the sugar came from, where it was processed, until it got to the store. So I think that's why it makes honey more natural, because you know exactly the kind of process it took to make it.”

– Quiara, 36

“As I read the story I love the QR symbol idea. That's great because that's what drew me in and kind of set the a-ha moment. Yes, this is something I would like to try. So just understanding the backstory, that's important to me too when I'm spending money.”

– Linda, 64

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IMPLICATION

Not every product/brand need play in every genre. While narrative types are not mutually exclusive, determining a product's north star is key to differentiation and being perceived as genuine.

IMPLICATION

Consider how on-pack labeling can point consumers to off-pack communication, particularly via websites and social media, can invite consumers for a deeper look behind the honey making process and engage in the world of honey and its potential uses in their lives.

Thank You



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The Hartman Group is the premier food and beverage consultancy in the world. Companies and brands across all segments of the food and beverage industry benefit from our unparalleled depth of knowledge on consumers, culture, trends, and demand-side market strategy. We listen closely to understand our clients' business challenges and tailor solutions that deliver transformative results. Through a unique suite of integrated custom, primary research capabilities, market analytics, and business strategy services, we uncover opportunity spaces and avenues for growth. We deliver more compelling insights that fuel inspiration and ideas for innovation.

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