Consumer A&U Report

July 2021

National Honey Board™

Contents

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.

2016
Completed segmentation, identified Natural Balancer target, and set benchmarks.

2017
NHB begins tracking U.S. consumer attitudes and usage (A&U) of honey among primary shoppers – General Population and Natural Balancers segment.

2018
Started asking about honey as a spread/topping in addition to sweeteners, negative story recall.

2019
Identified consumption declines in honey, tracked with retail sales declines, spurred by negative sweetener news

2020
Changed strategy GOOD for You, Good for the Planet, result in change in target segment (Goodness Seeker), COVID 19 hits US In March 2020

2021
Added questions around retailer perceptions

Methodology

- This is a tracking study, fielded in May of 2021
- Online quantitative survey conducted with US consumers (primary food shoppers)
- Sample
  - N = 2,007 (General Population);
  - N=404 (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 2021

Sample Comparison

	2018 Total Sample	2019 Total Sample	2020 Total Sample	2021 Total Sample	Percentage Point Change (2021–2020)
Gender					
Male	49%	49%	49%	49%	-
Female	51%	51%	51%	51%	-
Age					
18–24	13%	12%	10%	9%	-1%
25–34	21%	22%	19%	19%	-
35–45	23%	22%	21%	21%	-1%
46–54	17%	19%	19%	20%	+1%
55–64	17%	16%	18%	19%	+1%
65–75	9%	9%	12%	13%	+1%
HH Income					
Less than $50K	49%	47%	50%	40%	-10%
$50,000 but less than $75,000	19%	18%	17%	16%	-1%
$75,000 but less than $100,000	14%	15%	12%	15%	+3%
$100K+	17%	18%	21%	26%	+5%
Marital & Living Situation					
Not married, not living with partner	25%	31%	28%	23%	-5%
Married or living with partner	75%	69%	72%	77%	+5%

Goodness Seeker A&U Demographics

The demographic/life-stage profile of 2021 is skewed male and higher income

54% ↑
Male

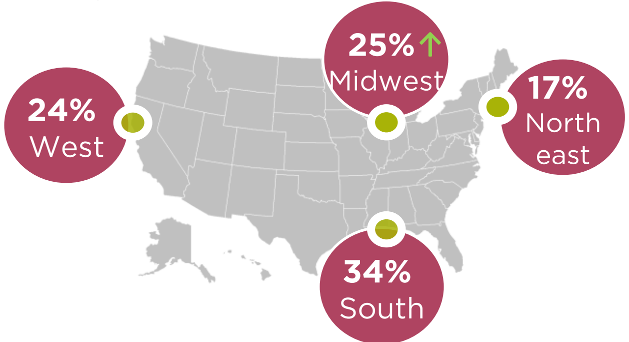
46%
Female

12%	18-24	**15%**	46-54
25%	25-34	**11%**	55-64
↑ **33%**	35-45	**5%**	65-75

78%
Married or living with sig. other

34%	$49k and under
12%	$50k-$74k
14%	$75k-$100k
↑ **38%**	$100k +

61%
Have children in the home



Insights & Implications

The positive momentum continues!

- Strong increases in positive story recall of all sweeteners (especially among Goodness Seekers), with honey leading
- Health and appeal perceptions of honey are up across the board
- Honey is by far the most preferred sweetener among Goodness Seekers, but lost its first place standing to granulated sugar among the Gen Pop
- Honey gained significantly on positive perceptions compared to maple syrup

Positive perceptions have translated to usage!

- Honey usage experienced significant increases among Goodness Seekers, with heavy users increasing by +6 points (Gen Pop) and +13 points (Goodness Seekers)!!!
- Future planned honey consumption increased by +5 points for the Gen Pop and +13 points for Goodness Seekers
- The percentage of consumers who say they will buy a product with honey regardless of price has increased for both Gen Pop (+4 points) and Goodness Seekers (+9 points)
- However, top-of-mind awareness is still noted as the #1 barrier to increasing honey consumption

Implication:

Continue to drive awareness and build positive honey perceptions and preference, as it translates into purchase!

Dual strategy of Health + Planet is still on target

- The most motivating messages for increased honey consumption are split between antioxidants and bee health, showing the need for both health and planet pillars
- Good for digestive health is an opportunity area that consumers deem as important, but don’t yet link to honey
- Making headway on honey’s positive connection to bee health, but there is still opportunity to educate, especially among the Gen Pop
    - Nearly half of consumers believe that honey consumption is very/somewhat good for the bees (48%), roughly 1/4 don’t know. The Goodness Seeker is more knowledgeable on the benefit of honey usage for bees (64%).

Implication:

Maintain focus on dual strategy of healthy and planet – consider ways to expand planet message to Gen Pop by leveraging Goodness Seekers’ influence to educate broader population.

Adulteration/purity concerns gaining

- Both Gen Pop and Goodness Seekers saw increases in importance of color/clarity of honey and True Source certified as it relates to honey purchases.
- Nearly three fourths of the Gen Pop say they are very/somewhat concerned about natural foods being adulterated as it relates to honey. The Goodness Seeker is more likely to be very concerned.
- Traditional grocery stores and supercenters are not typical locations consumers turn to for pure/raw and high quality/fresh honey.

Implication:

Identify strategies to build consumer confidence in purity of honey.

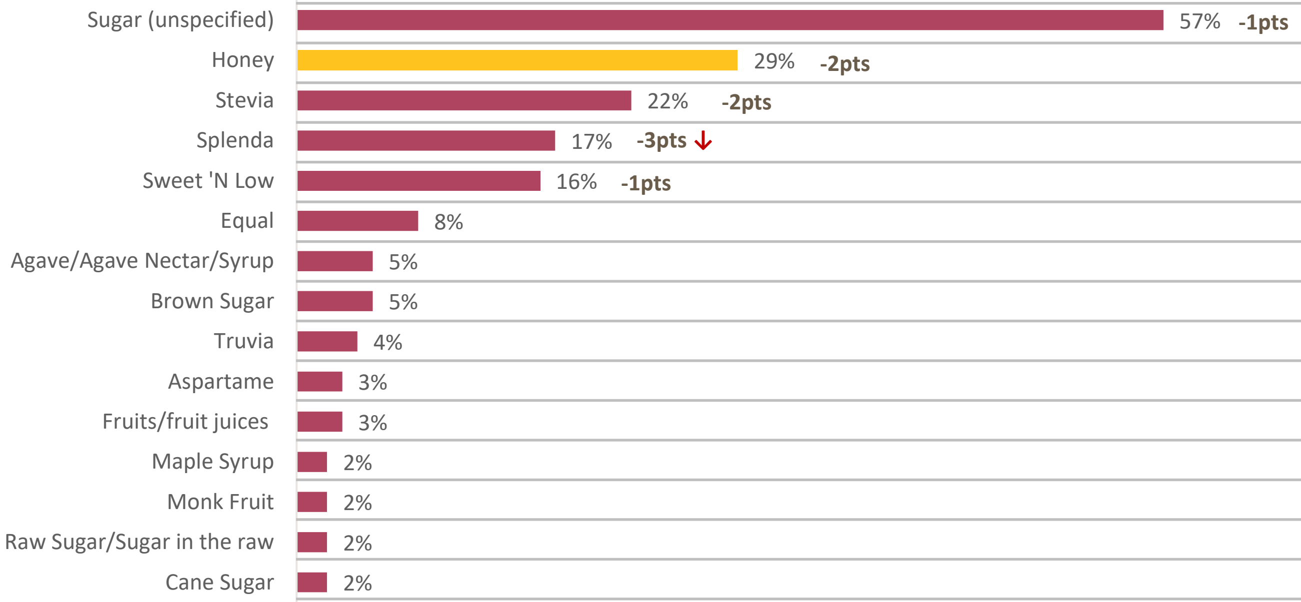
Attitudes, Awareness & Usage

SWEETENER AWARENESS: Honey remains the second most mentioned sweetener (unaided)

Unaided awareness for sweeteners saw minimal change from year ago. The mention of Sugar and Splenda saw significant decreases from Goodness Seekers. Goodness Seekers awareness of honey dropped this year and is now in line with general population.

Sweetener Awareness – Top 15 Unaided

(n = 2,007: Gen Pop)



			Goodness Seeker (n=429)	Goodness Seeker (2021 vs. 2020)
Sugar (unspecified)	57%	-1pts	39% ↓	-7%
Honey	29%	-2pts	29%	-6%
Stevia	22%	-2pts	29%	-5%
Splenda	17%	-3pts ↓	14% ↓	-8%
Sweet 'N Low	16%	-1pts	12%	-3%
Equal	8%		7%	+1%
Agave/Agave Nectar/Syrup	5%		8%	-1%
Brown Sugar	5%		6%	+3%
Truvia	4%		4%	-1%
Aspartame	3%		5%	+2%
Fruits/fruit juices	3%		3%	-
Maple Syrup	2%		5%	-
Monk Fruit	2%		4%	-
Raw Sugar/Sugar in the raw	2%		3%	-
Cane Sugar	2%		2%	-2%

↑ ↓

Q1. When you think about what you use to sweeten your food and beverages, what sweeteners come to mind? (2019-2021Q)

SWEETENER AWARENESS (2018-2021): Relatively flat from last year

Unaided awareness across all sweeteners fell marginally in 2021. Unaided awareness of honey has fallen from a peak of 36% in 2019 to 29% this year.

Unaided Sweetener Awareness	2018	2019	2020	2021	2021 vs 2020
Sugar					
Gen Pop (n = 2,000)	33%	63%	58%	57%	-1pt
Honey					
Gen Pop (n = 2,000)	**22%**	**36%**	**31%**	**29%**	**-2pts**
Stevia					
Gen Pop (n = 2,000)	33%	29%	24%	22%	-2pts
Splenda					
Gen Pop (n = 2,000)	30%	22%	20%	17% ↓	-3pts
Sweet 'N Low					
Gen Pop (n = 2,000)	29%	19%	17%	16%	-1pt
Equal					
Gen Pop (n = 2,000)	16%	11%	8%	8%	0pt
Agave Nectar/Syrup					
Gen Pop (n = 2,000)	8%	8%	6%	5%	-1pt

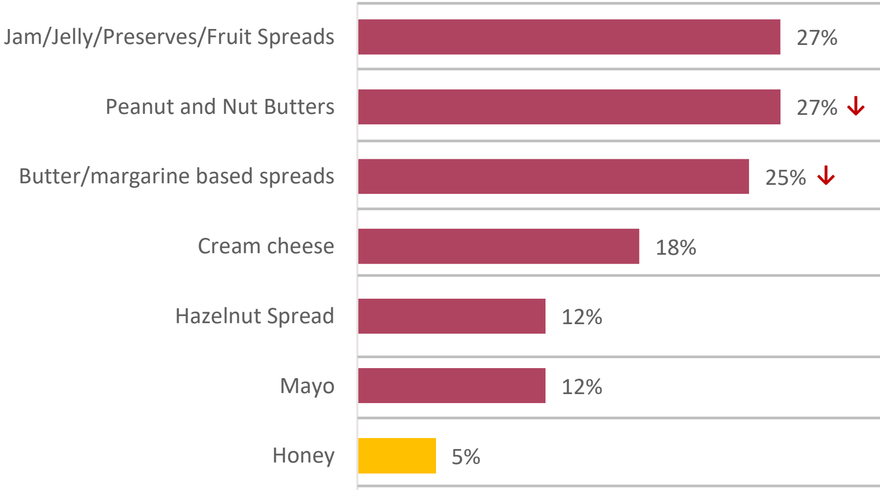
Q1. When you think about what you use to sweeten your food and beverages, what sweeteners come to mind? (2019-2021Q)

SPREADS AWARENESS: Awareness for honey as a spread remains low

Unaided awareness fell for both peanut and nut butters and regular butter/margarine for both gen pop and Goodness Seekers

Morning Toppings/Spread Awareness - Unaided

(n = 2,007: Gen Pop)



	Goodness Seeker (n=429)	**Goodness Seeker** (2021 vs. 2020)
Jam/Jelly/Preserves/Fruit Spreads	24%	-
Peanut and Nut Butters	23%	-7% ↓
Butter/margarine based spreads	19%	-6% ↓
Cream cheese	17%	-2%
Hazelnut Spread	17%	+2%
Mayo	9%	-1%
Honey	6%	-

↑ ↓

Q1B. When you think about toppings and spreads, which toppings and/or spreads come to mind? (2020 Q)

SPREADS AWARENESS (2018-2021): Top of mind awareness was relatively stable from 2020-2021.

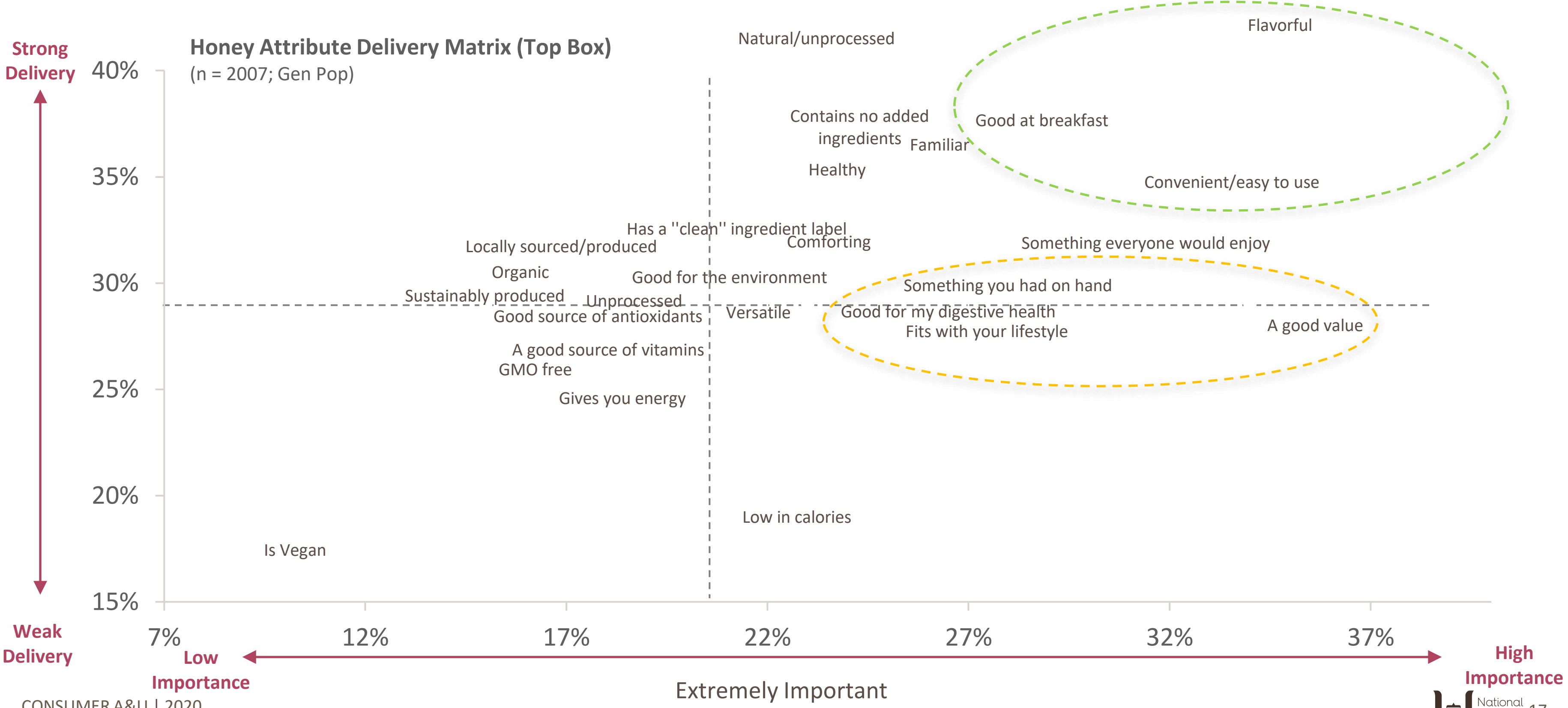
Butter/margarine-based spreads and peanut/nut butters declined slightly while awareness of Jam/Jelly/Preserves/Fruit Spreads and honey was stable Y/Y.

Unaided Morning Spreads Awareness	2018	2019	2020	2021	2021 vs 2020
Jam/Jelly/Preserves/Fruit Spreads					
Gen Pop (n = 2,000)	51%	55%	27%	27%	0pts
Butter/margarine-based spreads					
Gen Pop (n = 2,000)	45%	50%	29%	25%	-4pts ↓
Peanut/Nut Butters					
Gen Pop (n = 2,000)	27%	31%	30%	27%	-3pts ↓
Cream cheese					
Gen Pop (n = 2,000)	23%	24%	16%	18%	+2pts
Hazelnut Spread					
Gen Pop (n = 2,000)	19%	16%	14%	12%	-2pts
Honey					
Gen Pop (n = 2,000)	**11%**	**11%**	**5%**	**5%**	**0pts**

Q1B. When you think about toppings and spreads, which toppings and/or spreads come to mind? (2020)
Q1B. When you think about toppings and spreads in the morning or at breakfast, which toppings and/or spreads come to mind? (2018,2019)

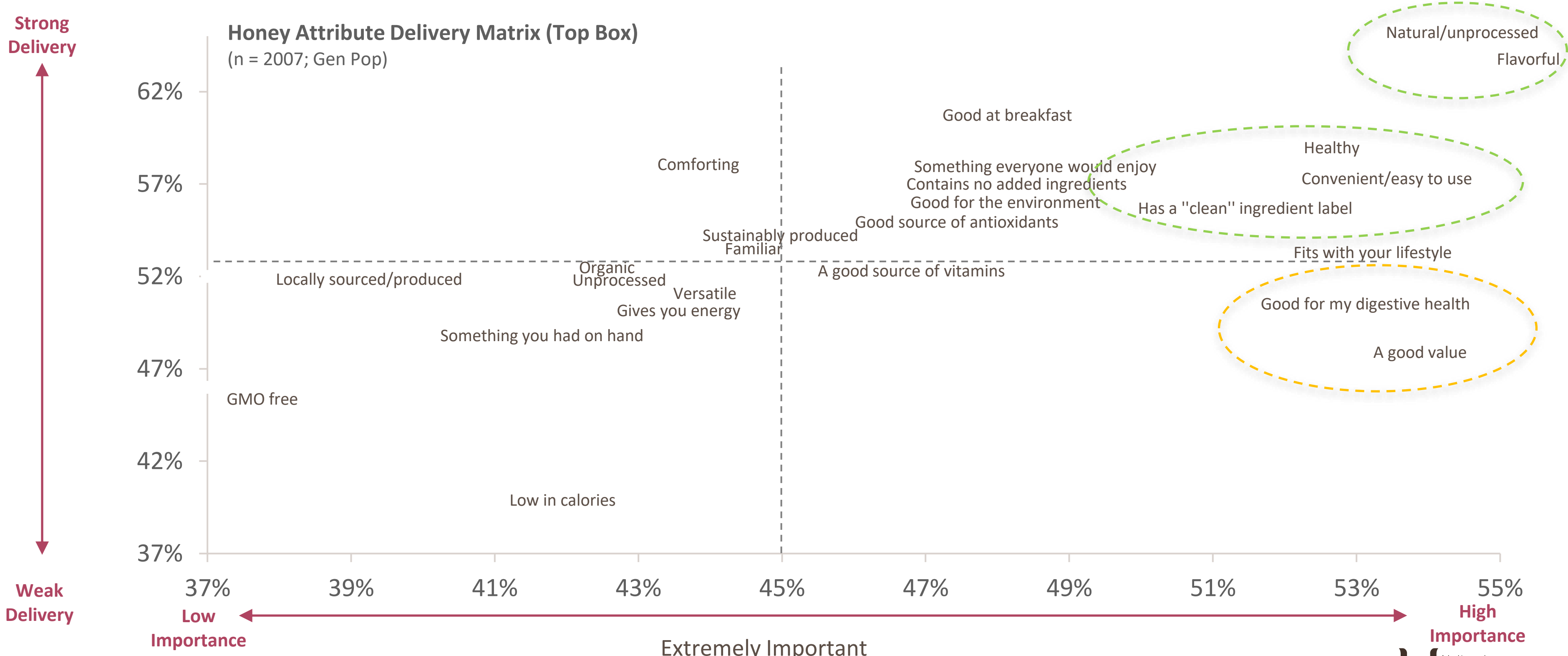
GEN POP HONEY IMPORTANCE/DELIVERY: Flavorful, convenient, and good at breakfast are key drivers

Honey also gets credit for being unprocessed, something everyone would enjoy, and familiar. Healthy and contains no added ingredients follow.



GOODNESS SEEKERS HONEY IMPORTANCE/DELIVERY: Many attributes are key drivers among GS

Goodness Seekers give honey credit across many attributes. Especially for being natural, healthy, and a clean label. Good for the environment and sustainability claims also score highly on importance and honey delivery.



PERCEPTIONS (2018-2021): Health and appeal perceptions have increased YOY

Honey has many benefits that consumers identify with, Goodness Seekers give more credit to honey across all attributes compared to the Gen Pop.

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

	2018 Gen Pop	2019 Gen Pop	2020 Gen Pop	2021 Gen Pop	2021 vs 2020	2020 Goodness Seekers	2021 Goodness Seekers	2021 vs 2020
BROAD APPEAL/VERSATILITY								
Something everyone would enjoy	78%	73%	73%	76%	+3pts ↑	86%	92%	+6pts ↑
Something you had on hand	80%	73%	73%	78%	+5pts ↑	87%	89%	+2pts
Versatile	78%	71%	72%	76%	+4pts ↑	87%	88%	+1pt
HEALTH/NATURAL								
Healthy	80%	76%	79%	81%	+2pts	91%	90%	-1pt
Natural (previously Natural/Unprocessed)	85%	85%	87%	87%	-	95%	96%	+1pt
A good source of vitamins	71%	60%	69%	72%	+3pts ↑	87%	88%	+1pt
Gives you energy	71%	62%	70%	72%	+2pts	84%	86%	+2pts
Organic	72%	63%	67%	71%	+4pts ↑	85%	89%	+4pts
Locally sourced/produced	74%	68%	75%	76%	+1pt	91%	91%	NC
GMO free	71%	60%	66%	68%	+2pts	85%	86%	+1pt
Low in calories	54%	46%	50%	54%	+4% ↑	67%	74%	+7pts ↑
Contains no added ingredients	84%	79%	81%	81%	NC	92%	92%	NC
Labeled as ''raw''	-	60%	66%	68%	+2pts	87%	86%	-1pt
Unprocessed	-	71%	74%	74%	NC	88%	86%	-2pts
Has a “clean" ingredient label	81%	73%	76%	77%	+1pt	92%	91%	NC
Good source of antioxidants	-	-	70%	74%	+4pts ↑	87%*	90%	+3pts
Good for my digestive health	-	-	72%	73%	+1pt	87%*	89%	+2pts
Is vegan	-	-	52%	55%	+3pts	70%*	74%	+4pts
FLAVOR & TASTE								
Flavorful	88%	84%	84%	86%	+2pts ↑	93%	94%	+1pt
CONVENIENT								
Convenient/easy to use	78%	74%	78%	80%	2%	89%	94%	+5pts ↑
Something you had on hand	80%	73%	73%		NC	87		
A GOOD VALUE	**72%**	**68%**	**68%**	**73%**	**+5pts ↑**	**82%**	**87%**	**+5pts**
FITS MY LIFESTYLE	73%	66%	68%	73%	+5pts ↑	87%	93%	+6pts ↑
COMFORTING/FAMILIAR								
Familiar	86%	80%	82%	85%	+3%	91%	95%	+4pts ↑
Comforting	79%	72%	76%	77%	+1pt	89%	89%	NC
GOOD AT BREAKFAST	83%	79%	77%	81%	+4pts ↑	90%	93%	+3pts
SUSTAINABILITY								
Sustainably produced	-	-	75%	76%	+1pt	90%	92%	+2pts
Good for the environment	-	-	75%	74%	-1pt	89%	89%	NC

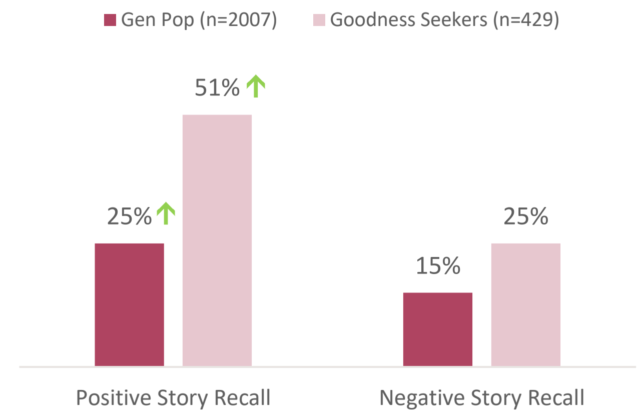
Q28. Please rate how well honey fits with the following attributes.

POSITIVE VS. NEGATIVE STORY RECALL: Positive sweetener story recall is driven by honey, especially among Goodness Seekers

Positive story honey recall continues to rise. Although, negative story recall increased, we see this reflected across many sweetener types, except granulated sugar which stayed the same and stevia which saw a significant decrease.

Sweetener Story Recall

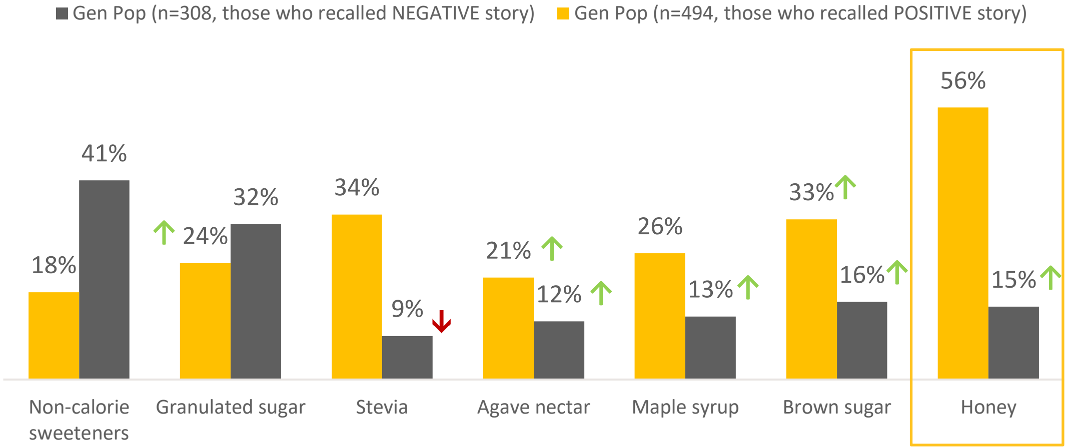
(Among those recalling positive or negative story)



Gen Pop vs YA	+3% pts	No Change
GS vs YA	+22% pts	+3% pts

Sweetener Mentioned in Story

(Among those recalling positive or negative story)

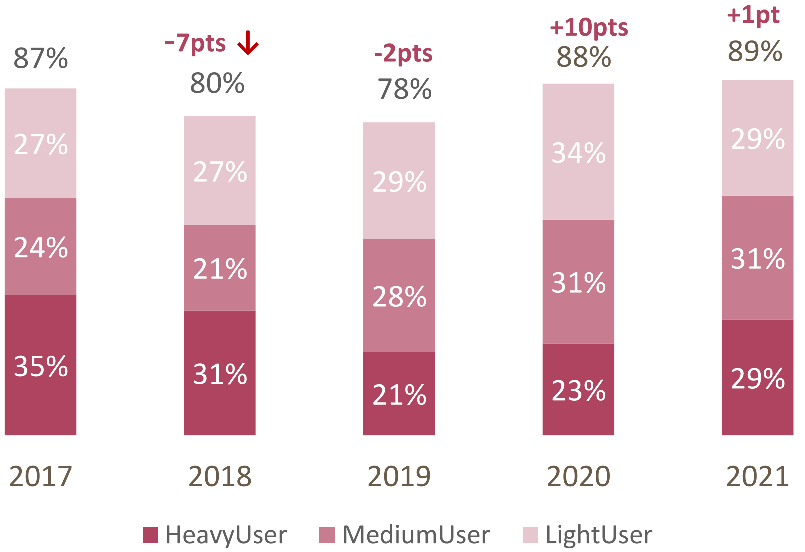


No Change	+10pts / -1pt	+2pts / -10pts	+7pts / +5pts	+3pts / +5pts	+9pts / +8pts	+6pts / +8pts

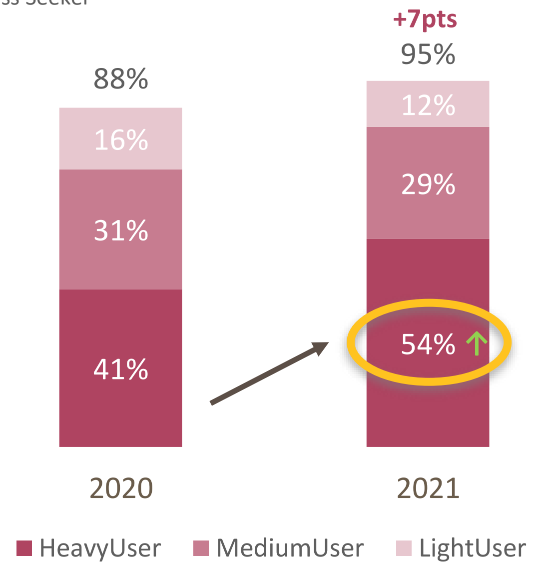
Q6. Within the past year, can you recall reading any articles or hearing a POSITIVE story about sweeteners in any public media, such as newspapers, magazines, radio, TV or online?
Q7D. Within the past year, can you recall reading any articles or hearing a NEGATIVE story about sweeteners in any public media, such as newspapers, magazines, radio, TV or online?

USAGE FREQUENCY (2017-2021): Honey usage experienced significant increases among Goodness Seekers, with heavy users increasing by +6 points (Gen Pop) and +13 points (Goodness Seekers)!!!

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



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



Non-User

13%	20%	22%	12%	11%

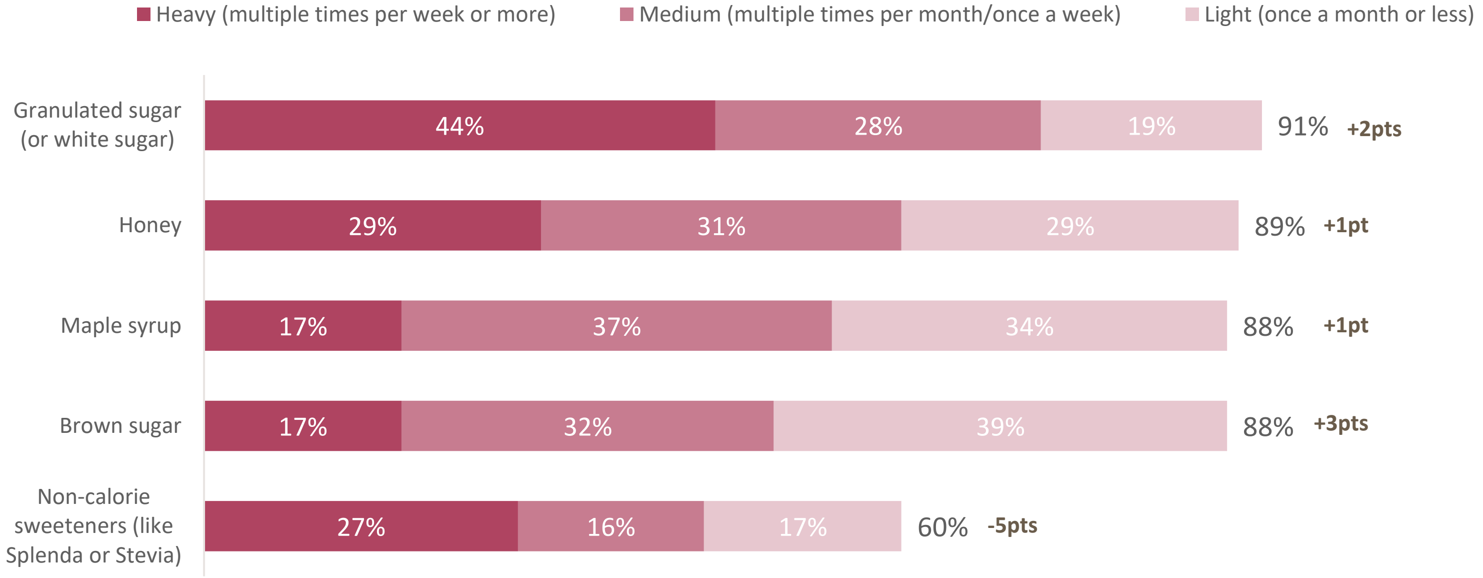
12%	5%

Q10A. Thinking about a typical week, how often do you usually eat the following types of sweeteners, spreads, and toppings, either by themselves or in other foods or beverages.

GP SWEETENER USAGE: Usage among all sweeteners continues to rise

Consumer's self report an increase with all types of sweeteners, aside from non-calorie sweeteners which declined from last year. Granulated sugar and non-calorie sweeteners still have the heaviest users. Honey's heavy users increased by 6%.

How often do you eat the following sweeteners, either by themselves or in other foods or beverages?
(n = 2,007, Gen Pop)

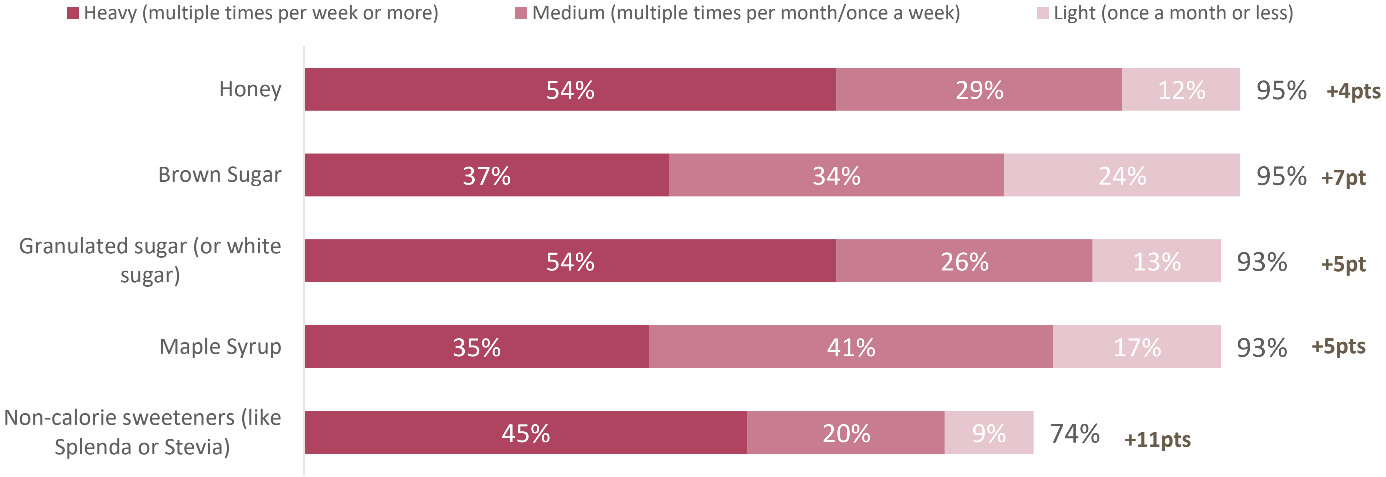


Q10A. Thinking about a typical week, how often do you usually eat the following types of sweeteners, either by themselves or in other foods or beverages.

GOODNESS SEEKERS USAGE: Honey ties with Brown Sugar in highest usage among Goodness Seekers.

Honey and brown sugar go head to head in overall usage, with honey being higher among heavy users. Heavy honey usage increased significantly compared to last year (+12pts).

How often do you eat the following sweeteners, either by themselves or in other foods or beverages?
(n = 429, Goodness Seeker)

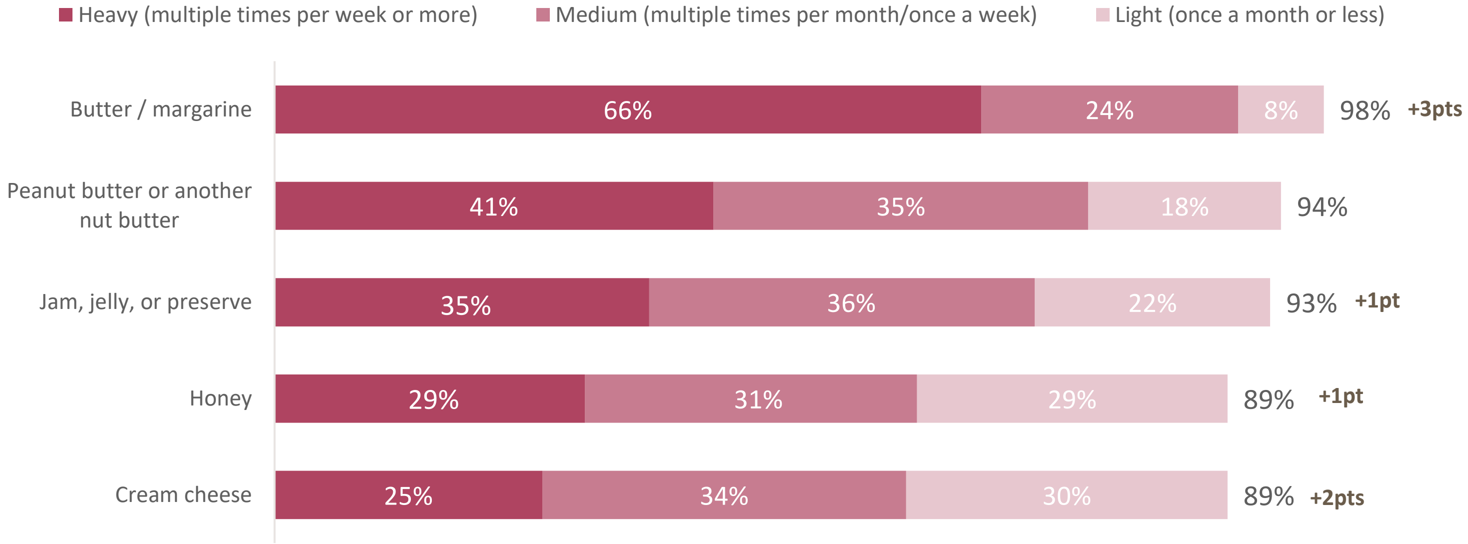


CONSUMER A&U | 2020 Q10A. Thinking about a typical week, how often do you usually eat the following types of sweeteners, either by themselves or in other foods or beverages.

GP SPREADS USAGE: Spread usage is relatively flat from last year

Spread consumption saw minimal increases compared to large increases from last year.

How often do you eat the following toppings, either by themselves or in other foods or beverages?
(n = 2,007, Gen Pop)

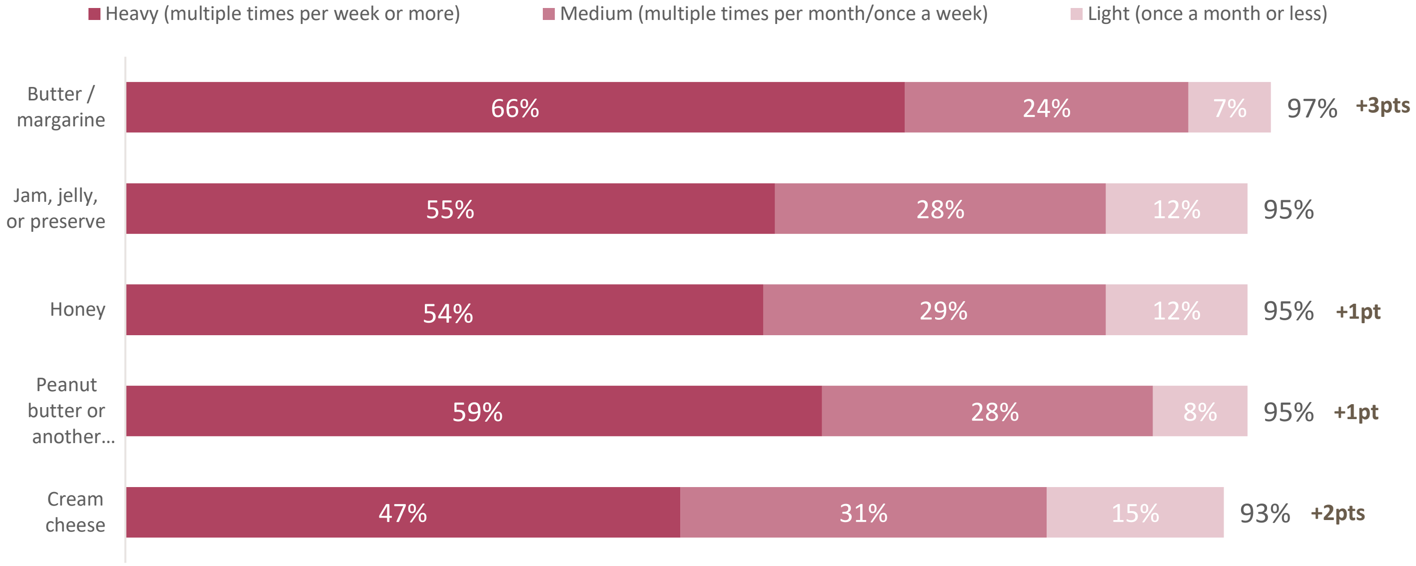


Q10A. Thinking about a typical week, how often do you usually eat the following types of spreads or toppings, either by themselves or in other foods or beverages.

GOODNESS SEEKERS USAGE: Higher usage of certain spreads/toppings vs gen pop.

The Goodness Seeker is much more likely to use certain spreads and toppings vs the general population, especially the heavy users: Honey (54% vs 29%), Jams/jelly/preserves (55% vs 35%) and cream cheese (47% vs 25%)

How often do you eat the following toppings, either by themselves or in other foods or beverages?
(n = 429, Goodness Seeker)



Q10A. Thinking about a typical week, how often do you usually eat the following types of spreads or toppings, either by themselves or in other foods or beverages.

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

Breakfast continues to reflect the bulk of honey occasions (at over half); lunch and dinner combined reflect another 40%.

Typical Honey Usage Across Forms/Occasions (Summary of Top 4 Box)
(n= 1,568, Gen Pop; n = 267, Natural Balancer)

Breakfast

Gen Pop (55%↑6% pts)

G. Seeker (59%)

Lunch

Gen Pop (21% ↑ 5% pts)

G. Seeker (27%)

Dinner

Gen Pop (19%↑ 5% pts)

G. Seeker (28% ↑ 10% pts)

Q11. Which of the following describes how honey is typically used in your household?
Q12A. How often do you typically consume or use honey in the following types of forms/occasions?

TYPICAL USAGE (2018 – 2021): Daypart usage saw an increase in nearly all occasions

Outside of breakfast, lunch, and dinner usage also saw significant increases in items like baked goods, snacking, and alcoholic beverages.

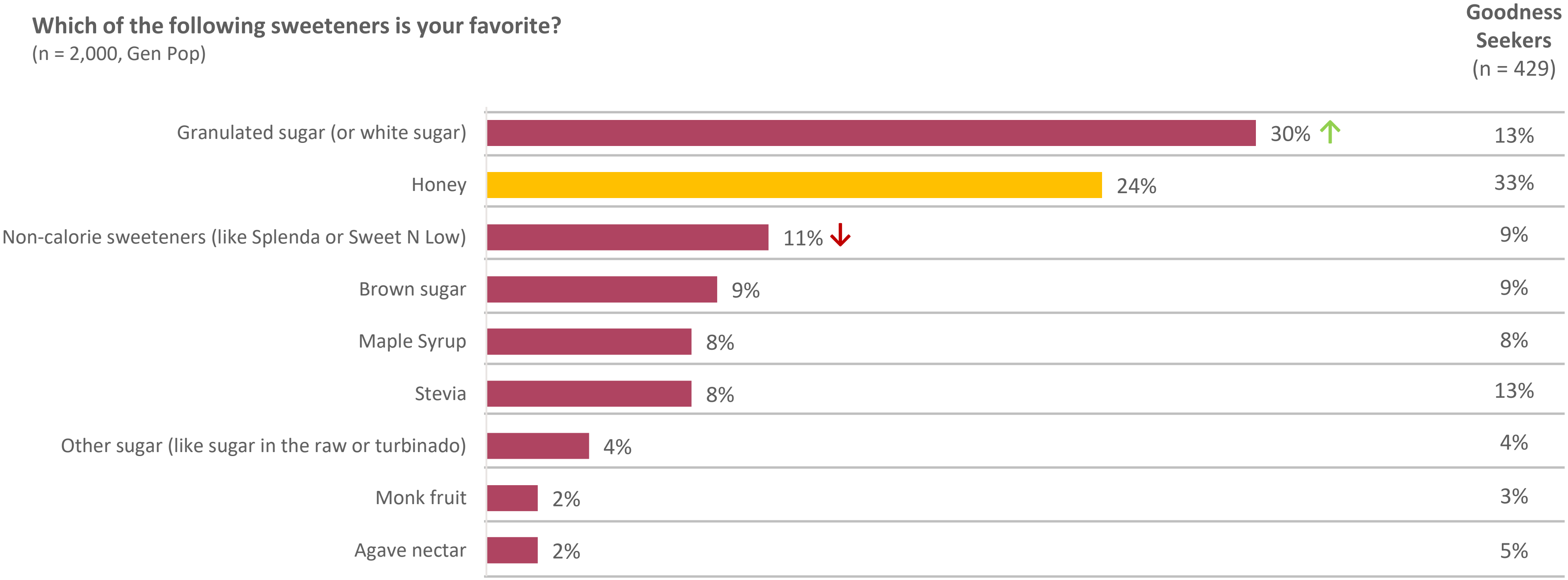
	2018 Gen Pop (n = 2,003)	2019 Gen Pop (n = 1,568)	2020 Gen Pop (n=2000)	2021 Gen Pop (n=2000)	2021 vs 2020	2020 Goodness Seeker (n=350)	2021 Goodness Seeker (n=429)	2021 vs 2020
Used at breakfast	47%	52%	49%	55%	+6% ↑	58%	59%	+1pt
Used in baked goods	39%	43%	41%	47%	+6% ↑	50%	57%	+7pts ↑
Used in beverages like tea, coffee, or smoothies	49%	56%	51%	51%	-	55%	49%	-6pts
Used in alcoholic beverages or mixed drinks	6%	5%	6%	9%	3%↑	12%	15%	+3pts
Used with snacks	28%	29%	29%	37%	+8%↑	35%	49%↑	+14pts ↑
Used at dinner	15%	14%	14%	19%	+5%↑	18%	28%↑	+10pts ↑
Used at lunch	14%	13%	16%	21%	+5% ↑	23%	27%	+4pts
Used for medical purposes	20%	15%	17%	20%	+3%↑	20%	30%↑	+10pts ↑
Used in a recipe	47%	50%	48%	46%	-2%	55%	48%	-7pts ↓
Used in beauty care			7%	10%	+3pts ↑	12%	19%	+7pts ↑
Other	5%	2%	2%	2%	-		2%	

Q11. Which of the following describes how honey is typically used in your household?

SWEETENER PREFERENCE: Granulated Sugar is the most preferred sweetener among the Gen Pop, beating out honey who took first place last year.

Honey is the second most preferred sweetener with the general population and the most preferred sweetener for Goodness Seekers by far.

Which of the following sweeteners is your favorite?
(n = 2,000, Gen Pop)



Q3. And of these sweeteners, which is your favorite?

SWEETENER PREFERENCE (2017-2020): Honey slipped slightly among Gen Pop, but increased with Goodness Seekers.

Granulated sugar saw the largest increase while other sweeteners remained nearly flat.

	2018 Gen Pop (n = 2,003)	2019 Gen Pop (n = 2,001)	2020 Gen Pop (n=2,000)	2021 Gen Pop (n=2,000)	2021 vs 2020	2020 Goodness Seeker	2021 Goodness Seeker	Goodness Seeker 2021 vs 2020
Honey	**24%**	**27%**	**26%**	**24%**	**-2pts**	**31%**	**33%**	+2pts
Granulated sugar (or white sugar)	28%	28%	23%	30%	+7pts ↑	15%	13%	-2pts
Non-calorie sweeteners (like Splenda)	18%	18%	9%	11%	-2pts ↓	11%	9%	-2pts
Maple syrup	12%	12%	9%	8%	-1pts	8%	8%	-
Brown sugar	9%	8%	11%	9%	-2pts	8%	9%	+1pts
Other sugar (like Sugar In The Raw or turbinado)	3%	4%	4%	4%	0pts	3%	4%	+1pts
Agave nectar	2%	2%	3%	2%	-1pt	3%	5%	+2pts

Q3. And of these sweeteners, which is your favorite?

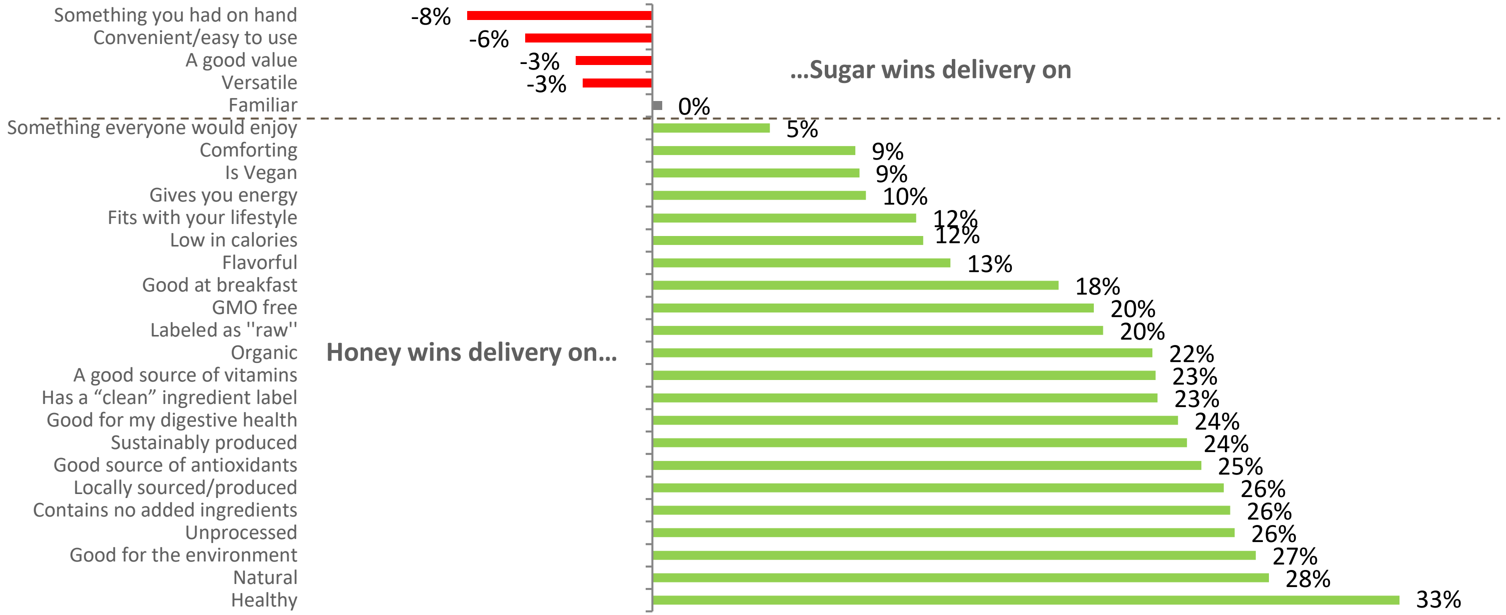
DELIVERY GAP HONEY VS SUGAR: Honey maintains stronghold on sugar

Similar to 2020, honey strongly outperforms sugar on health, natural, and sustainability attributes. Sugar has a slight advantage in familiarity and convenience.

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

Gap on Top Box Rating "Excellent"

(Q28 n = 504; Q29 n = 607)



Q28. Please rate how well honey delivers on the following attributes.

Q29. And please rate how well Granulated Sugar delivers on the following attributes.

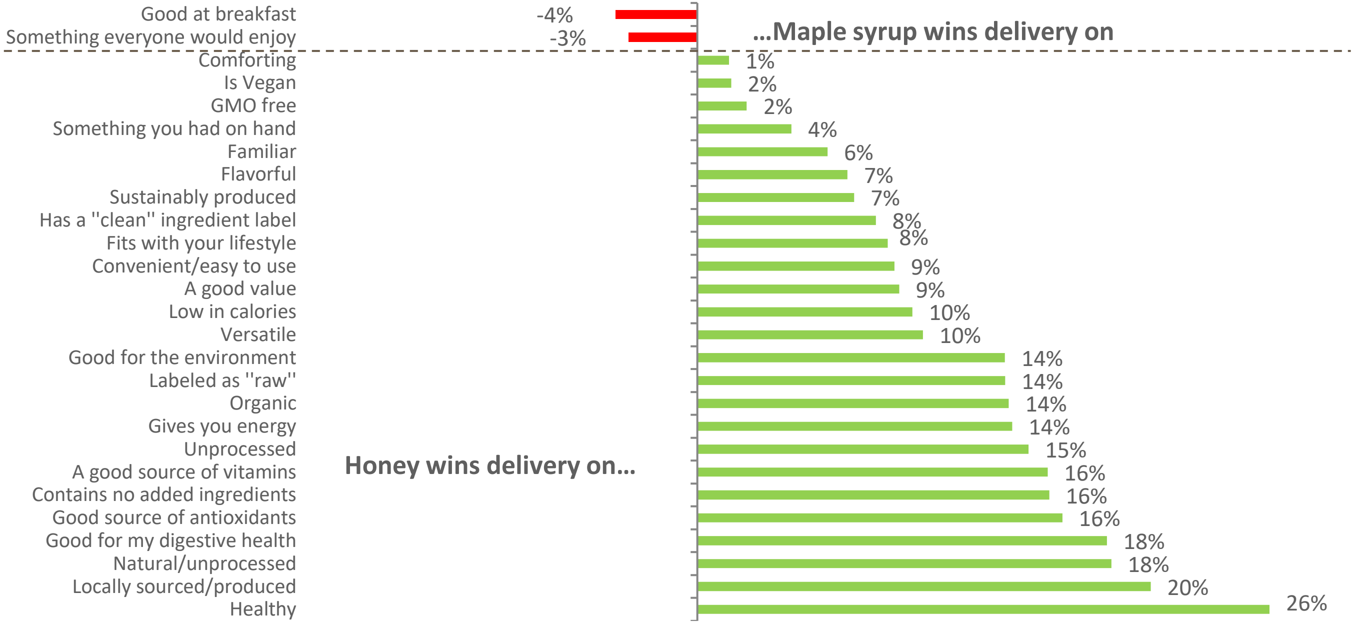
DELIVERY GAP HONEY VS Maple Syrup: Honey has gained significantly on Maple Syrup

Honey maintained its strong advantage over Maple Syrup on perceptions of being unprocessed, healthy, and being a good source of antioxidants / vitamins. Compared to 2020, honey is now winning on flavorful, familiar, value and versatility.

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

Gap on Top Box Rating "Excellent"

(Q28 n = 504; Q29 n = 160)



…Maple syrup wins delivery on

Honey wins delivery on…

Q28. Please rate how well honey delivers on the following attributes.

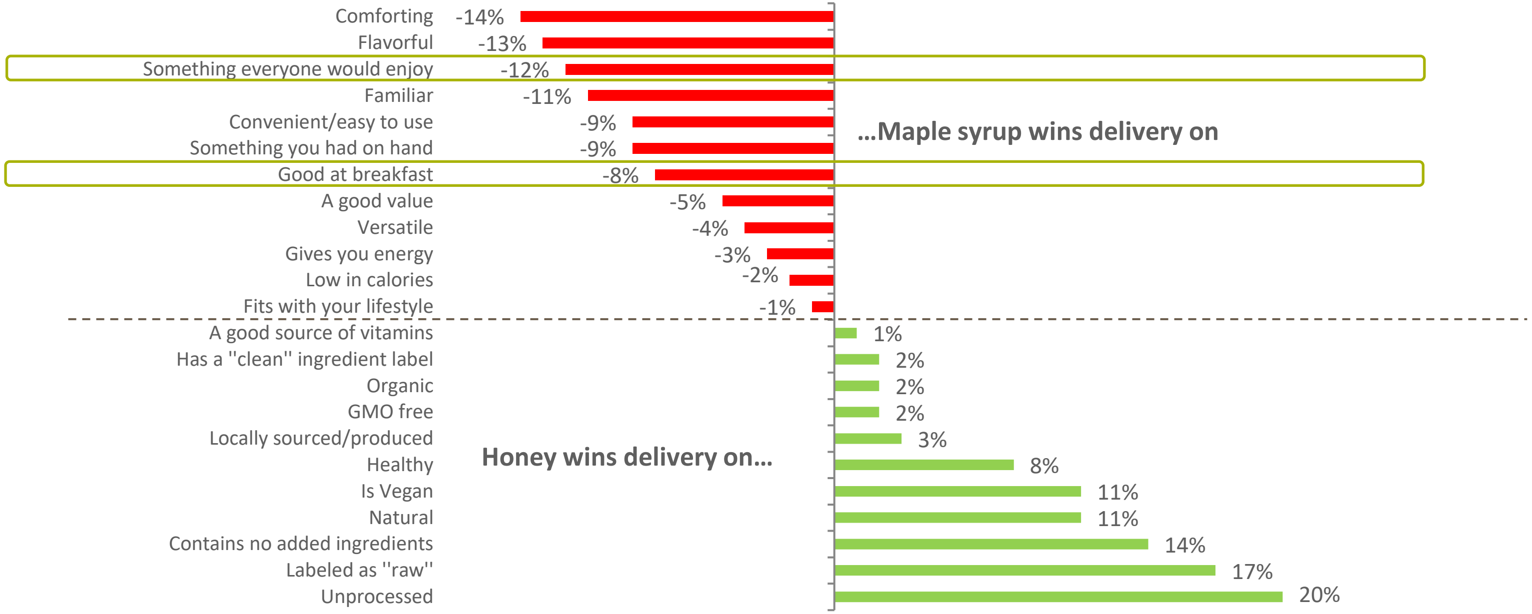
Q29. And please rate how well Maple Syrup delivers on the following attributes.

DELIVERY GAP HONEY VS Maple Syrup: 2020 COMPARISION FOR REFERENCE

This chart is from the 2020 report for reference, demonstrating just how much honey has closed the gap with 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)

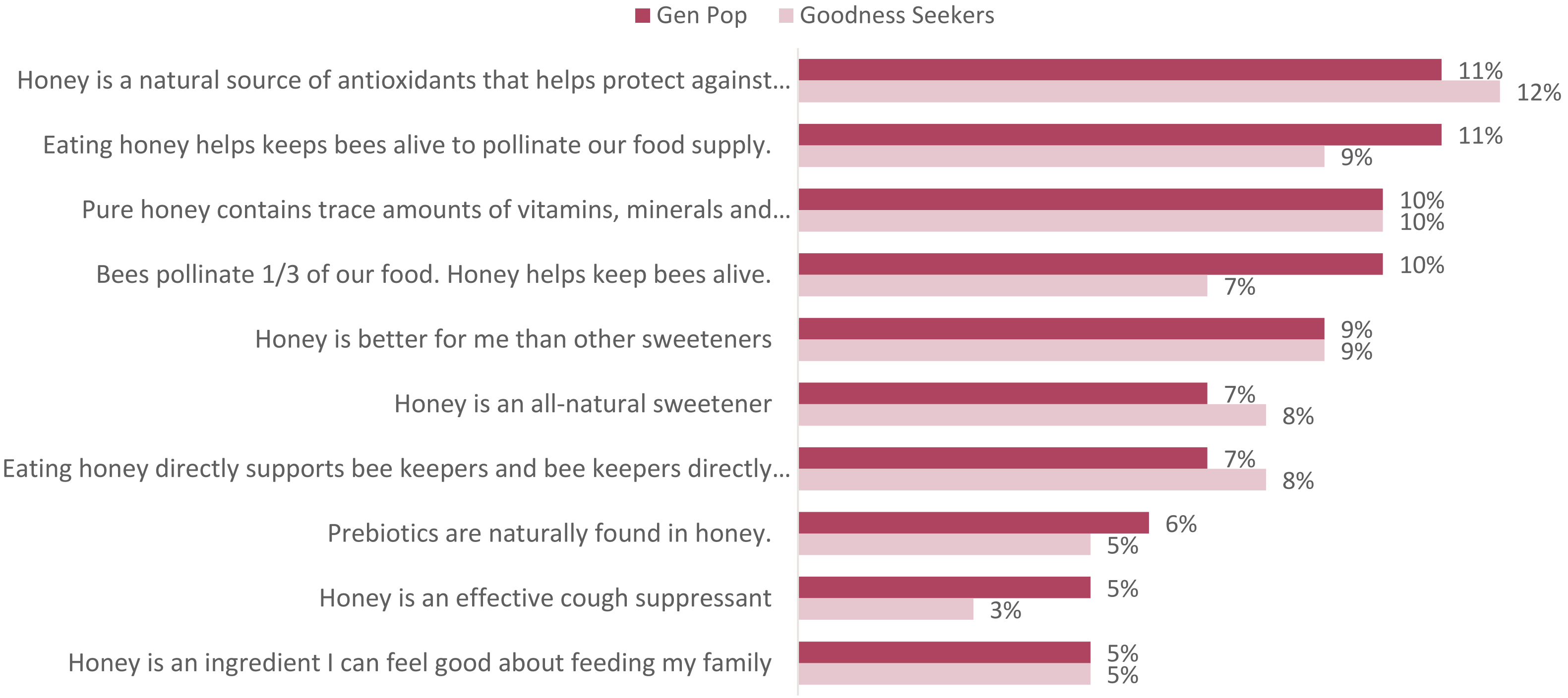


Q28. Please rate how well honey delivers on the following attributes.
Q29. And please rate how well Granulated Sugar delivers on the following attributes.

MOTIVATING STATEMENTS: Motivating messages are split between antioxidants and bee health, showing the need for both health and planet pillars.

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

Sorted by Medium Honey Users



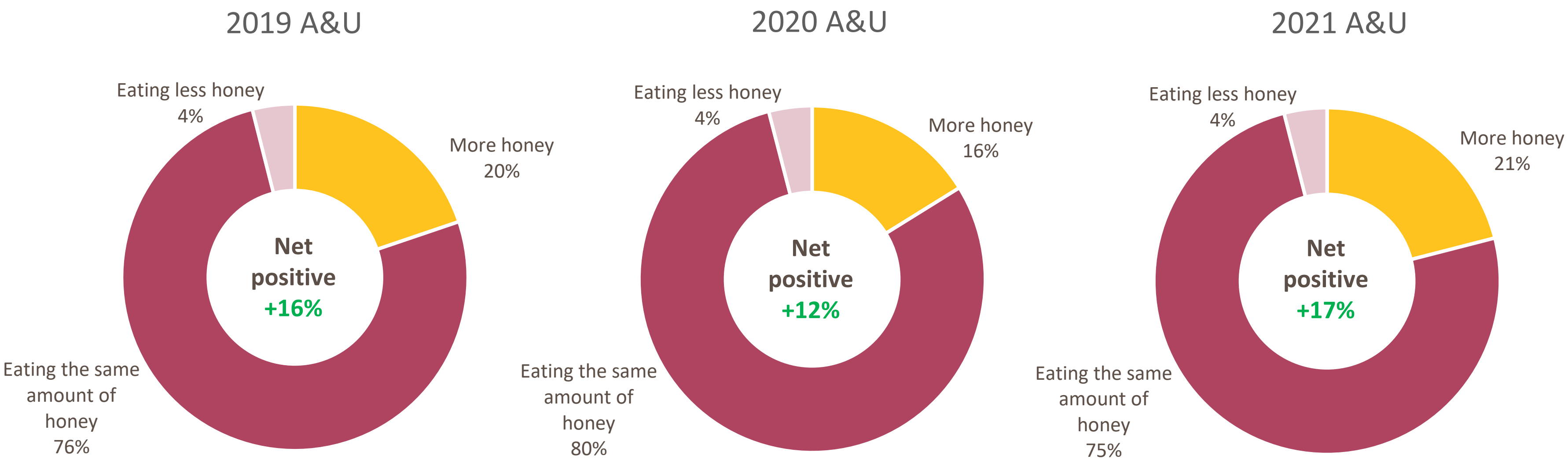
	Gen Pop	Goodness Seekers
Honey is a natural source of antioxidants that helps protect against…	11%	12%
Eating honey helps keeps bees alive to pollinate our food supply.	11%	9%
Pure honey contains trace amounts of vitamins, minerals and…	10%	10%
Bees pollinate 1/3 of our food. Honey helps keep bees alive.	10%	7%
Honey is better for me than other sweeteners	9%	9%
Honey is an all-natural sweetener	7%	8%
Eating honey directly supports bee keepers and bee keepers directly…	7%	8%
Prebiotics are naturally found in honey.	6%	5%
Honey is an effective cough suppressant	5%	3%
Honey is an ingredient I can feel good about feeding my family	5%	5%

CONSUMER A&U | 2020 Q31. Now which of the following is the most effective in motivating you to eat honey more often?

GP HONEY CONSUMPTION: Future planned honey consumption rises 5 points

The majority of consumers still report honey consumption will remain the same next year.

Anticipated change in honey consumption over next year

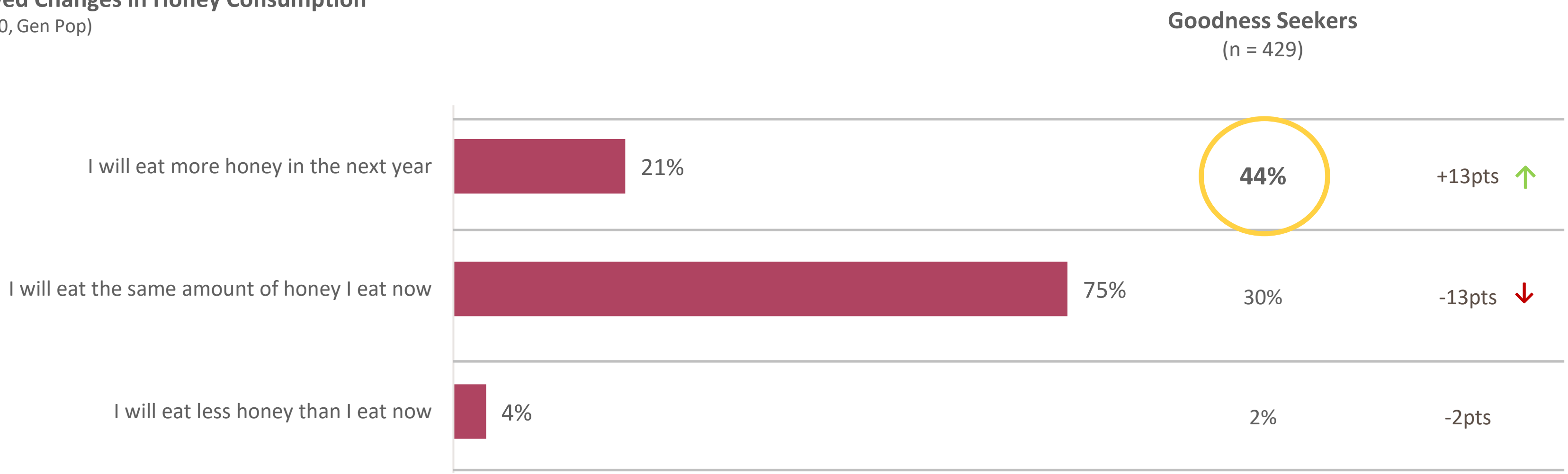


Q24A. Do you plan to eat honey in the next year?

HONEY CONSUMPTION: Goodness Seekers expect to increase their honey consumption next year

Only 2% expect to decrease their consumption.

Perceived Changes in Honey Consumption
(n = 2,000, Gen Pop)



Net Positive **Gen Pop:** 17%

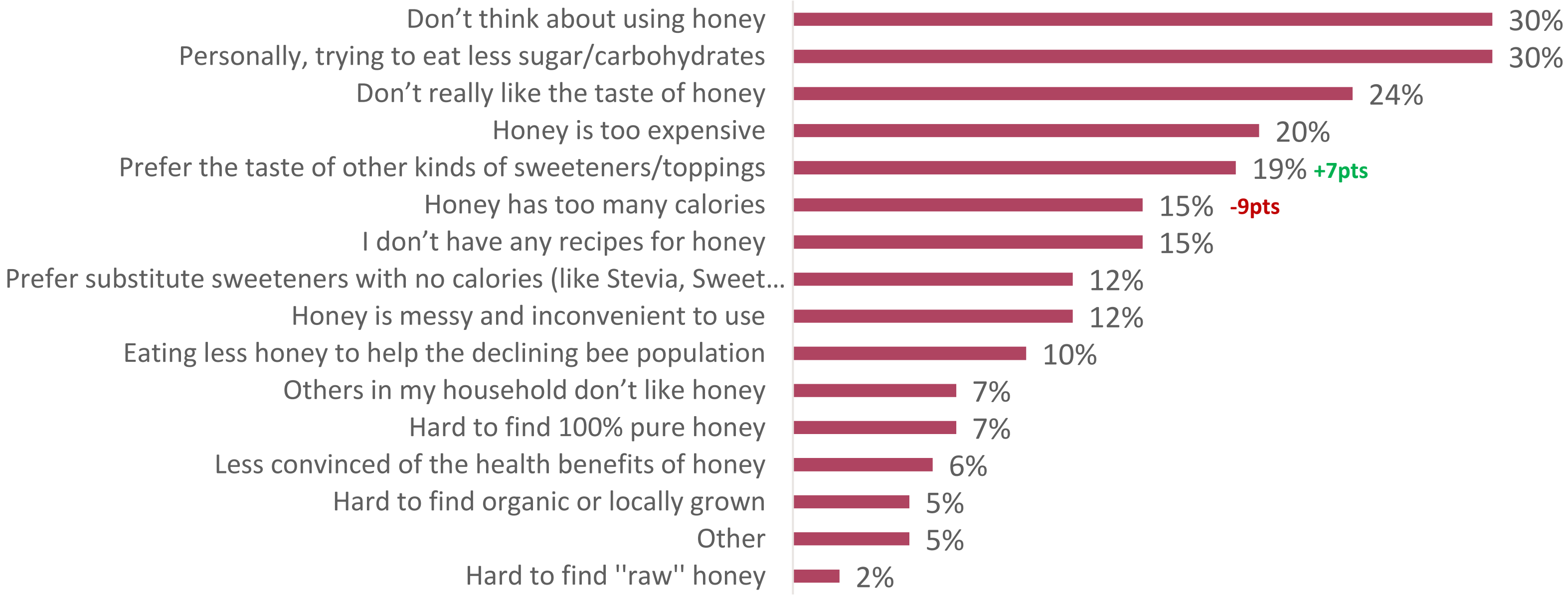
Q24A. How if at all, do you expect your honey consumption to change in the next year?

EAT LESS BARRIERS: Top of mind awareness and the desire to eat less sugar/carbs are the top barriers to more frequent honey consumption.

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

Aided, Select all that apply

(n = 86)



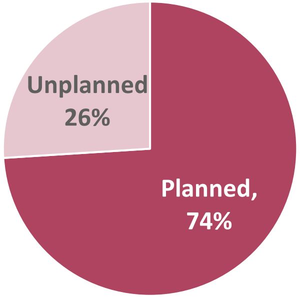
Q24C. Which of the following are reasons you will eat less honey than you eat now in the next year?

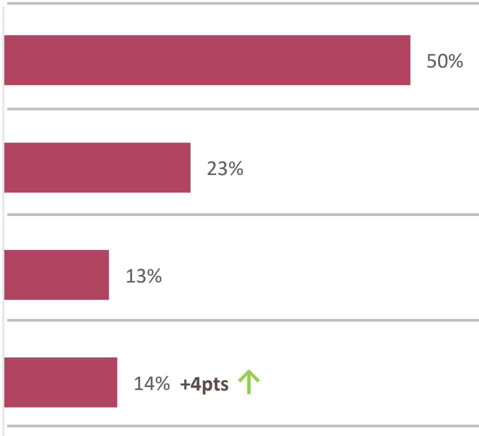
Path to Purchase

PRE-SHOPPING: Three-quarters of consumers say they plan their honey purchase

Consistent with last wave, restocking is the top reason for honey purchase followed by purchasing honey for use in a recipe. Purchasing unplanned due to something interesting increased significantly for both Gen Pop and Goodness Seekers.

Planned Purchase
(n = 1,553, Gen Pop)



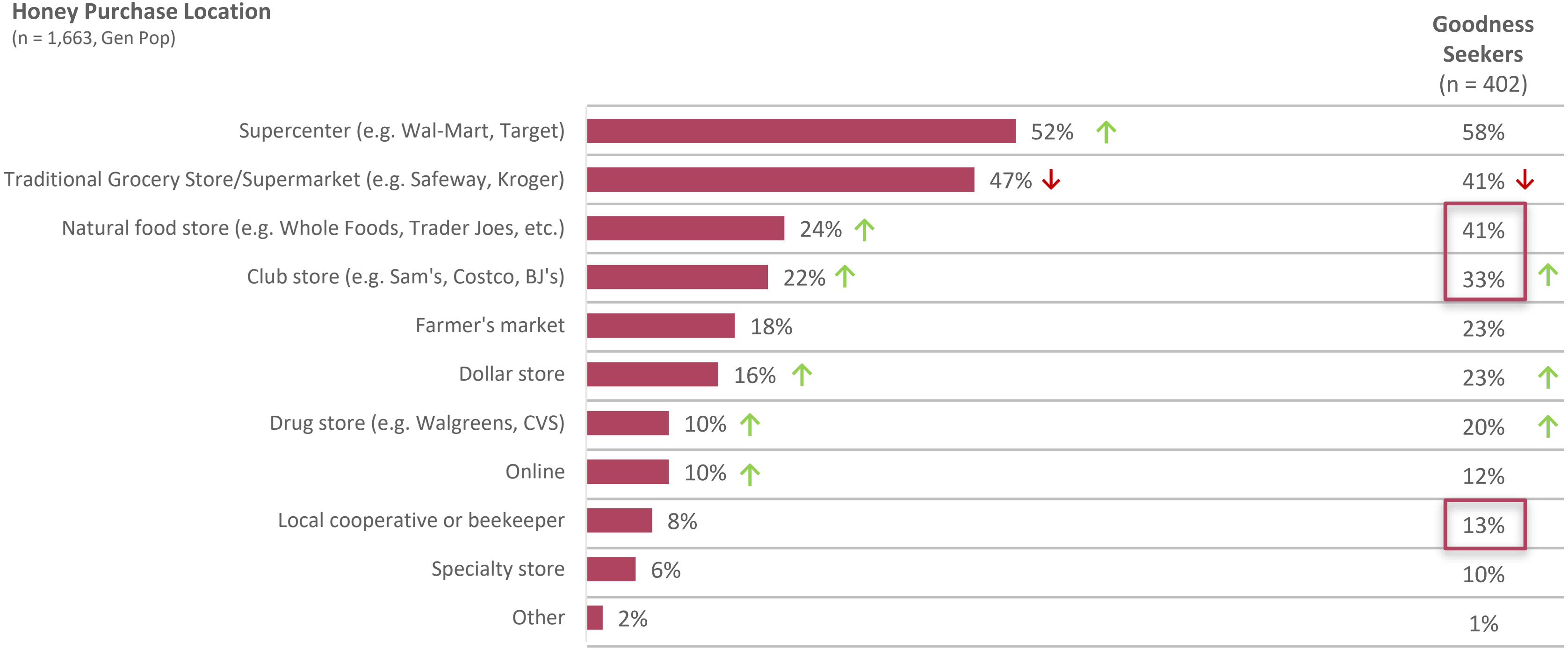


	Reason for Purchase (n = 2,007 Gen Pop)	Goodness Seekers (n = 429)	Goodness Seekers 2021 vs 2020
Restocking: I was out of honey and needed to replace it	50%	41%	-7pts
Recipe: I had a specific use in mind and needed to purchase honey for it	23%	24%	-1pts
Promotion: I noticed an attractive price or display on honey and decided to buy some	13%	13%	+2pts
New variety/something interesting: I saw a new type of honey or something different that interested me	14% **+4pts** ↑	22%	+6pts ↑

Q20. Now, thinking about that last time your purchased honey by itself, was it…?
Q20A. Again, thinking about the last time you bought honey, what was the reason that you decided to purchase it that day?

RETAIL OUTLET: Supercenters take the lead in retail honey shopping

Traditional grocery stores are down even more than last year while supercenter’s saw significant increases in addition to club, drug, and dollar store. Goodness Seekers are more likely to shop at Natural Food Store, Farmers Market, and at specialty stores.



Honey Purchase Location

(n = 1,663, Gen Pop)

Q19. Please indicate where you typically shop for or purchase honey. Please select all that apply.

RETAIL OUTLET (2017-2020): Supercenter's take the lead

Many retailers where consumers shop and buy honey saw increases compared to last year. Most notably supercenters, dollar store, natural grocery stores, and club stores.

	2018 Gen Pop (n = 2,003)	2019 Gen Pop (n = 1,568)	2020 Gen Pop (n=1602)	2021 Gen Pop (n=1663)	2021 vs 2020	2020 Goodness Seekers (n=350)	2021 Goodness Seekers (n=429)	2021 vs 2020
Supercenter (e.g. Wal-Mart, Target)	48%	41%	41%	52%	+11pts ↑	44%	58%	+14pts ↑
Traditional Grocery Store/Supermarket (e.g. Safeway, Kroger)	51%	59%	56%	47%	-9pts ↓	53%	41%	-12pts ↓
Natural food store (e.g. Whole Foods, Trader Joes, etc.)	21%	21%	19%	24%	+5pts ↑	40%	41%	+1pts
Farmer's market	12%	20%	18%	18%	-	26%	23%	-3pts
Club store (e.g. Sam's, Costco, BJ's)	19%	13%	17%	22%	+5pts ↑	22%	33%	+11pts ↑
Dollar store	9%	7%	8%	16%	+8pts ↑	11%	23%	+12pts ↑
Local cooperative or beekeeper	6%	8%	8%	8%	-	9%	13%	+4pts
Online	3%	4%	7%	10%	+3pts ↑	14%	18%	+4pts
Drug store (e.g. Walgreens, CVS)	7%	4%	7%	10%	+3pts ↑	12%	20%	+8pts ↑
Specialty store	4%	4%	6%	6%	-	11%	10%	-1pts
Other	2%	1%	1%	2%	+1pts	1%	1%	-

Q19. Please indicate where you typically shop for or purchase honey. Please select all that apply.

Why do you purchase honey from the following retailers?

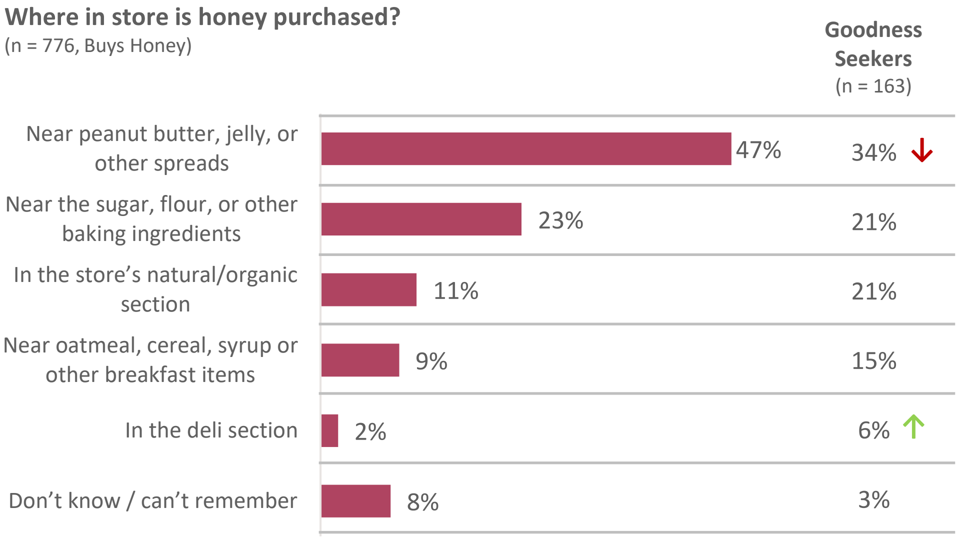
Many consumers purchase honey where they do the majority of their grocery shopping out of convenience. Others purchase honey from natural grocery stores, farmer's markets, local coops, and specialty stores because the honey is locally sourced, from retailers they trust to offer pure, natural honey and offer a wide variety.

	Quantity/Size	Price/Value	Locally Sourced	Pure/Raw Honey	A Variety of Honey Types & Flavors	High Quality/ Fresh	Always Shop Here	Natural/ Organic Options	Convenient/ The store is close to my house
Traditional Grocery Store		✓			✓		✓		✓
Natural Grocery Store	✓		✓	✓	✓	✓	✓	✓	
Club Store (e.g., Costco)	✓	✓	✓	✓	✓	✓		✓	
Supercenter (e.g., Walmart)	✓	✓					✓		
Drug store (e.g., Walgreens)		✓							✓
Farmer's Market			✓	✓	✓	✓		✓	
Local Cooperative or Beekeeper			✓	✓		✓		✓	
Specialty store				✓	✓	✓			
Dollar store		✓							✓
Online retailer (e.g., Kroger)					✓		✓		✓
Online/App (e.g., Amazon)					✓		✓		✓

Q19a. Above you mentioned typically purchasing honey from [INSERT Q19 RESPONSE BELOW, IF MULTIPLE LEAST FILL]. In your own words, why do you purchase honey from there?

IN STORE: Most look for honey with spreads

Roughly half of consumers look for honey with spreads & toppings, the remaining are looking in multiple sections of the store. Fewer Goodness Seekers said they typically purchase honey from the nut butter or jelly aisle.



Where in store is honey purchased?
(n = 776, Buys Honey)

Q19B. Which section of the store best describes where you typically purchase honey?

DECISION CRITERIA: Price and Brand Trust drive choice

Gen Pop and Goodness Seekers differ in key purchase drivers, with price driving Gen Pop and brand driving Goodness Seekers. Both audiences saw significant increases in color/clarity of honey and True Source certified.

Honey Decision Criteria (n = 2,007, Gen Pop)	2020 Gen Pop	2021 Gen Pop	2021 vs 2020	2020 Goodness Seekers	2021 Goodness Seekers	2021 vs 2020
PRICE	42%	45%	+3pts	29%	35%	+6pts
A BRAND I KNOW AND TRUST	30%	25%	-5pts	39%	29%	-10pts
CLAIM BENEFITS						
Labeled as Local	18%	16%	-2pst	21%	14%	-7pts
Labeled as Organic	16%	12%	-4pts	32%	21%	-9pts
Labeled as Pure, Unfiltered, or Raw	23%	22%	-1pt	35%	29%	-6pts
TYPE OF HONEY						
Type or Form (liquid, whipped, comb)	22%	25%	+3pts	20%	22%	+2pts
Varietal (Manuka, clover, wildflower)	8%	9%	+1pt	10%	12%	+2pts
Country of origin	11%	9%	-2pts	15%	15%	-
Flavored (vanilla, cinnamon)	4%	8%	-4pts	5%	14%	+4pts
Color or Clarity of Honey	9%	17%	+8pts	10%	22%%	+12pts
PACKAGING/FORM						
Container Size	36%	31%	-4pts	24%	26%	+2pts
Container Type (glass, plastic)	12%	14%	+2pts	10%	16%	+6pts
True Source Certified	4%	9%	+5pts	9%	18%	+9pts

20B. When thinking about the last time you purchased honey, what were the three most important criteria when deciding which honey to buy?

LAST HONEY PURCHASE:

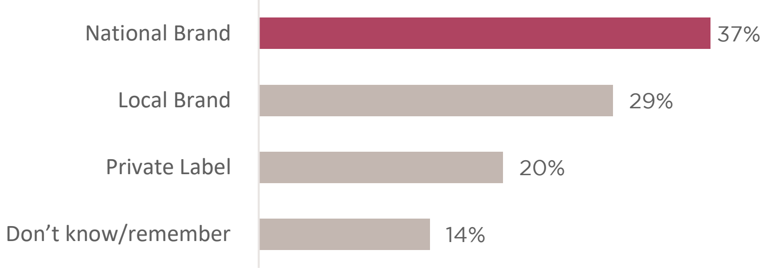
Most consumers bought a national brand of liquid honey for their last purchase. Raw, unfiltered, and 100% pure once again ranked as the top benefit consumers prefer.

FORM

90% purchased liquid honey

10% purchased a spread, whipped, or honeycomb

BRAND



KEY BENEFITS

14% none of these

45% ↑

41%

33% ↑

Q20A1: Please tell us about the last honey purchase you made, be as specific as possible.

LAST HONEY PURCHASE:

Consistent with last wave, plastic or squeezable bottles that are under 24 oz are favored by most consumers.

CONTAINER SIZE

26% Large/bulk honey (24 oz or over) ↑

74% small/medium honey (under 24 oz) ↓

CONTAINER TYPE

36% glass bottle or jar (31% PY) ↑

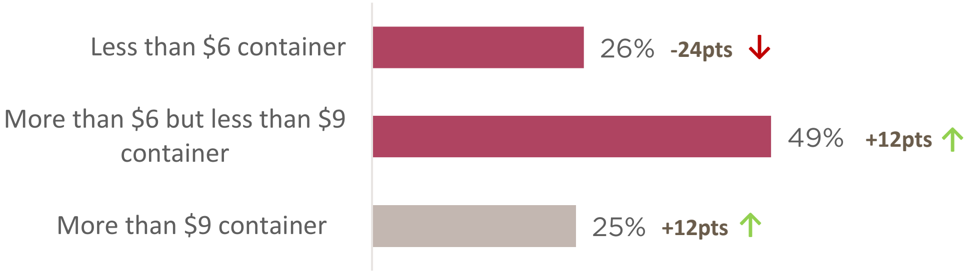
63% plastic bottle or squeeze bottle ↓ (67% PY)

Q20A1: Please tell us about the last honey purchase you made, be as specific as possible.

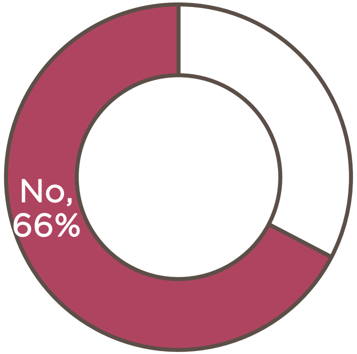
LAST HONEY PURCHASE:

Consumers were much more likely than last wave to report paying $6+ for a container of honey.

PRICE PAID



ON SALE, PROMOTION OR DISCOUNTED



34%

Bought honey on sale

↑ ↓

VALUE PERCEPTION (2018-2021): Consumer sensitivity to price continues softened

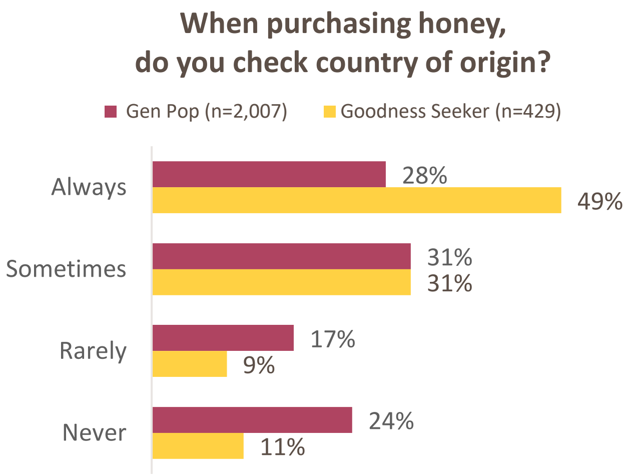
The percentage of consumers who say they will buy the product with honey regardless of price has increased for both Gen Pop (+4 points) and Goodness Seekers (+9 points).

	2018 Gen Pop (n = 2,003)	2019 Gen Pop (n = 2,001)	2020 Gen Pop (n=2000)	2021 Gen Pop (n=2000)	2021 vs 2020	2020 Goodness Seekers (n=350)	2021 Goodness Seekers (n=429)	2021 vs 2020
I will buy the product with honey, regardless of price	17%	4%	6%	10%	+4pts ↑	15%	24%	+9pts ↑
I will buy the product with honey, even if I have to pay a little more for it	24%	14%	16%	17%	+1pt	28%	28%	-
It does not influence my decision	32%	45%	39%	36%	-6pts ↓	21%	22%	+1pt
I will buy the product with honey, but **only if it does not cost more**	22%	27%	27%	25%	-2pts ↓	24%	16%	-8pts ↓
I prefer the product that **does not have honey**	6%	10%	12%	12%	-	12%	10%	-2pts

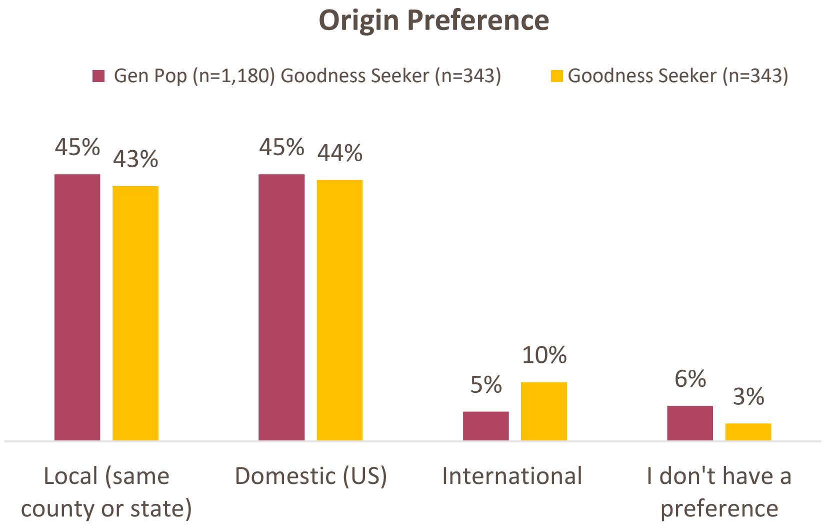
Q18. Imagine two similar products side-by-side in the grocery store or on a restaurant menu; one product has honey while the other does not have any honey in it. Which statement more accurately reflects which product you will purchase?

COUNTRY OF ORIGIN: Consumer’s check for country of origin on jar

Nearly 30% of General Population say they always look for the country of origin when purchasing honey while almost half of Goodness Seekers say they always check. And by large they want their honey to be either local or domestic.



When purchasing honey, do you check country of origin?



Origin Preference

Q23c. When purchasing honey, do you check for the country of origin? / 23d. And where do you prefer your honey to be from?

AT HOME – Pantry is still the dominant storage area. Although, honey is being kept out on the counter or table more frequently than previous years.

79% in a pantry or cabinet ↑

9% in the fridge

21% out on a counter ↑

5% in a drawer ↓

11% out on a table ↑

↑ ↓

21B. Where in your home do you keep the honey product(s) that you purchase?

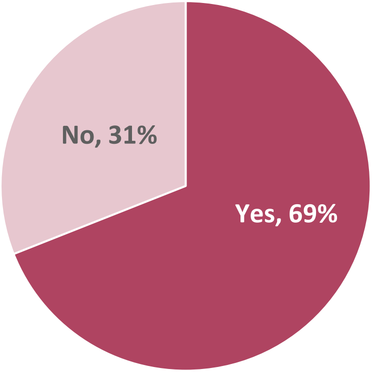
Goodness Seeker (n = 402)	
In a pantry or cabinet	80% ↑
Out on a counter (visible for everyday use)	28% ↑
In the refrigerator	12%
Out on a table (visible for everyday use)	22% ↑
In a drawer	10% ↑

Sustainability Concerns

AWARENESS OF DECLINING BEE POP: Awareness is high but continuing to decline

Nearly 7 in ten consumers are aware that the bee population is declining, however that number has trended down since 2019. Awareness among Goodness Seekers is higher than gen pop but has also declined.

Are you aware of the declining honey bee population?
(n = 2,000, Gen Pop)



Goodness Seekers (n=350):
Yes: 72% , No: 28%

Are you aware of the declining honey bee population? - Tracking

Awareness of Declining Honey Bee Pop	2018	2019	2020	2021	2021 vs 2020
Yes					
Gen Pop (n = 2,000)	73%	76%	72%	69%	-3% ↓
Goodness Seekers (n=429)	-	-	79%	72%	-7pts ↓
No					
Gen Pop (n = 2,000)	27%	24%	28%	31%	+3pts ↑
Goodness Seekers (n=429)	-	-	21%	28%	+7pts ↑

Q36. Are you aware of the declining honey bee population?

BEE HEALTH PERCEPTIONS (2018-2021): Some confusion with gen pop remains

Roughly half of consumers believe that honey consumption is very/somewhat good for the bees (48%), roughly 1/4 don't know.
The Goodness Seeker is more knowledgeable on the benefit of honey usage for bees (64%).

	2018 Gen Pop (n = 1,246)	2019 Gen Pop (n = 2,001)	2020 Gen Pop (n=2000)	2021 Gen Pop (n=2000)	2021 vs 2020	2020 Goodness Seekers (n=350)	2020 Goodness Seekers (n=429)	2021 vs 2020
Very good for honey bees	35%	21%	23%	25%	+2pts	40%	43%	+3pts
Somewhat good for honey bees	23%	23%	24%	23%	-1pt	19%	21%	+2pts
Not good or bad for honey bees	15%	17%	18%	18%	-	13%	10%	-3pts
Somewhat bad for honey bees	7%	6%	5%	7%	+2pts	7%	7%	-
Very bad for honey bees	2%	3%	2%	3%	+1pt	3%	3%	-
Don't know/not sure	19%	30%	27%	24%	-3pts	18%	16%	-2pts

Q36B. Which of the following best describes your impression of whether using honey is good or bad for honey bees?

SUSTAINABILITY CONCERNS (2018-2021): Bee Health continues to be a top sustainability concern.

Just behind food safety. Sustainability concerns have seen slight declines since 2019, bee health remained the same. Goodness Seekers are overall more likely to have sustainability concerns than the general population although concern around food safety and bee health has declined from last year.

Concern with Sustainability Topics (Top Box, “Very Concerned”) – Tracking

	2018 Gen Pop (n = 2,003)	2019 Gen Pop (n = 2,001)	2020 Gen Pop (n=2000)	2021 Gen Pop (n=2000)	2021 vs 2020	2020 Goodness Seekers (n=350)	2020 Goodness Seekers (n=429)	2021 vs 2020
Food safety	46%	43%	40%	37%	-3pts	68%	60%	-8pts ↓
Bees (i.e., honey bee health, pollination, etc.)	41%	40%	35%	34%	-1pt	59%	52%	-7pts ↓
Farming chemicals, pesticides, or chemical residue	41%	39%	35%	33%	-2pts	64%	59%	-5pts
Natural foods containing added ingredients or natural foods being adulterated	28%	25%	25%	23%	-2pts	57%	55%	-2pts
GMOs	27%	21%	22%	20%	-2pts	50%	46%	-4pts
Packaging that is recyclable or environmentally friendly	27%	25%	22%	23%	+1pt	47%	48%	+1pt
Local sourcing/farming (i.e., how far does this food travel)	24%	19%	21%	21%	-	49%	46%	-3pts
Carbon footprint	23%	22%	21%	22%	+1pt	45%	46%	+1pt
Organic or made with organic ingredients	22%	16%	18%	19%	+1pt	47%	44%	-3pts
Social responsibility (i.e., a percentage of proceeds donated to a cause)	21%	15%	18%	18%	-	43%	40%	-3pts
Food or beverages being over-processed	-	32%	29%	29%	-	61%	57%	-4pts

Q33. Are you concerned about any of the following as they relate to the foods you eat overall?
Q33A. Are you concerned about any of the following as they relate to the foods and beverages you eat overall?

HONEY ADULTERATION CONCERNS (2017-2020): Increased slightly

Nearly three fourths say they are very/somewhat concerned about natural foods being adulterated as it relates to honey. The Goodness Seeker is more likely to be very concerned.

	2018 Gen Pop (n = 1,450)	2019 Gen Pop (n = 1,354)	2020 Gen Pop (n=1329)	2021 Gen Pop (n=1291)	2021 vs 2020	2020 Goodness Seeker (n=256)	2020 Goodness Seeker (n=368)	2021 vs 2020
I am very concerned about natural foods being adulterated as it relates to honey	35%	31%	30%	33%	+3pts	49%	55%	+6pts
I am somewhat concerned about natural foods being adulterated as it relates to honey	47%	45%	45%	46%	+1pt	33%	33%	-
I have heard about natural foods being adulterated but am not very concerned as it relates to honey	14%	15%	17%	14%	-3pts ↓	12%	8%	-4pts ↓
I am not concerned at all about natural foods being adulterated or feel it does not relate to honey	5%	9%	8%	7%	-1pt	6%	5%	-1pt

Q34A. Of the topics you indicated being concerned about, which ones are you concerned about as it relates to honey?

Key Performance Indicators

General Population – KPI’s

#2

Honey is America’s second favorite sweetener at 24%, down 2% pts vs year ago

76%

(top 2 box)

Perceptions of honey remain strong, 75% something everyone would enjoy, positive shift in broad appeal and health halo

Report using honey multiple times a month or more; with 29% being heavy users, up 6% pts

14%

Recall a positive story about honey, up from 8% YA

#1

Morning continues to be the number one daypart for Honey at 55%, up 6%pts vs YA

48%

Believe honey consumption is good for the bees (+1%pt vs YA)

Goodness Seeker – KPI's

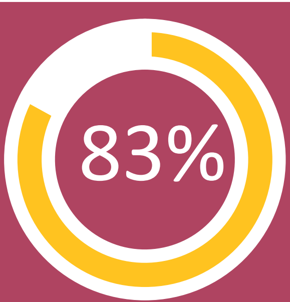
#1

Honey is the favorite sweetener among Goodness Seeker at 33% (+2% pts), beating sugar 2:1

92%

(top 2 box)

Perceptions of honey remain strong, 92% something everyone would enjoy, positive shift in broad appeal and convenience



Report using honey multiple times a month or more; with 54% being heavy users, up 13% pts

31%

Recall a positive story about honey, significantly higher than gen pop.

#1

Morning is the number one daypart for Honey, 59% use it with breakfast (no change YA)

64%

Believe honey consumption is good for the bees (+5%pts vs. YA)

Metrics Dashboard

Awareness, Preference, and Usage	**General Population**					
	2017	2018	2019	2020	2021	2021 vs 2020
Honey Awareness (Unaided)						
Gen Pop (n = 2,007)	22%	22%	36%	31%	29%	-2pts
Goodness Seeker (n = 429)				35%	29%	-6pts ↓
Honey Usage - % Using Honey Several Times/Month or More						
Gen Pop (n = 2,007)	59%	53%	49%	54%	60%	+6pts ↑
Goodness Seeker (n = 429)				72%	83%	+11pts ↑
% Selecting Honey as Favorite Sweetener						
Gen Pop (n = 2,007)	22%	24%	27%	26%	24%	-2pts
Goodness Seeker (n = 429)				31%	33%	+2pts
Honey Positive Story Recall						
Gen Pop (n = 2,007)	12%	12%	6%	8%	14%	+6pts ↑
Goodness Seeker (n = 429)				18%	31%	+13pts ↑

Metrics Dashboard

	General Population					
Sustainability	2017	2018	2019	2020	2021	2021 vs 2020
Aware of the Declining Honey Bee Population						
Gen Pop (n = 2,007)	76%	73%	76%	72%	69%	-3pts ↓
Goodness Seeker (n=429)				79%	72%	-7pts ↓
Very Concerned with Honey Bee Health (overall)						
Gen Pop (n = 2,007)	49%	41%	40%	35%	34%	-1pt
Goodness Seeker (n=429)				59%	52%	-7pts ↓
% Saying Honey is Very/Somewhat Good for Honey Bees						
Gen Pop (n = 2,007)	56%	57%	44%	47%	48%	+1pt
Goodness Seeker (n=429)				59%	64%	+5pts ↑
Honey Shopping	2017	2018	2019	2020	2021	2021 vs 2020
% Will Buy the Honey Product Even if have to pay more for it or regardless of price						
Gen Pop (n = 2,007)	40%	41%	18%	22%	27%	+5pts ↑
Goodness Seeker (n=429)				43%	52%	+9 pts ↑
Adulteration/Purity	2017	2018	2019	2020	2021	2021 vs 2020
% Very Concerned about "Natural foods containing added ingredients or natural foods being adulterated" regarding honey						
Gen Pop (n = 2,007)	-	35%	31%	30%	33%	+3pts
Goodness Seeker (n=429)				49%	55%	+6pts ↑

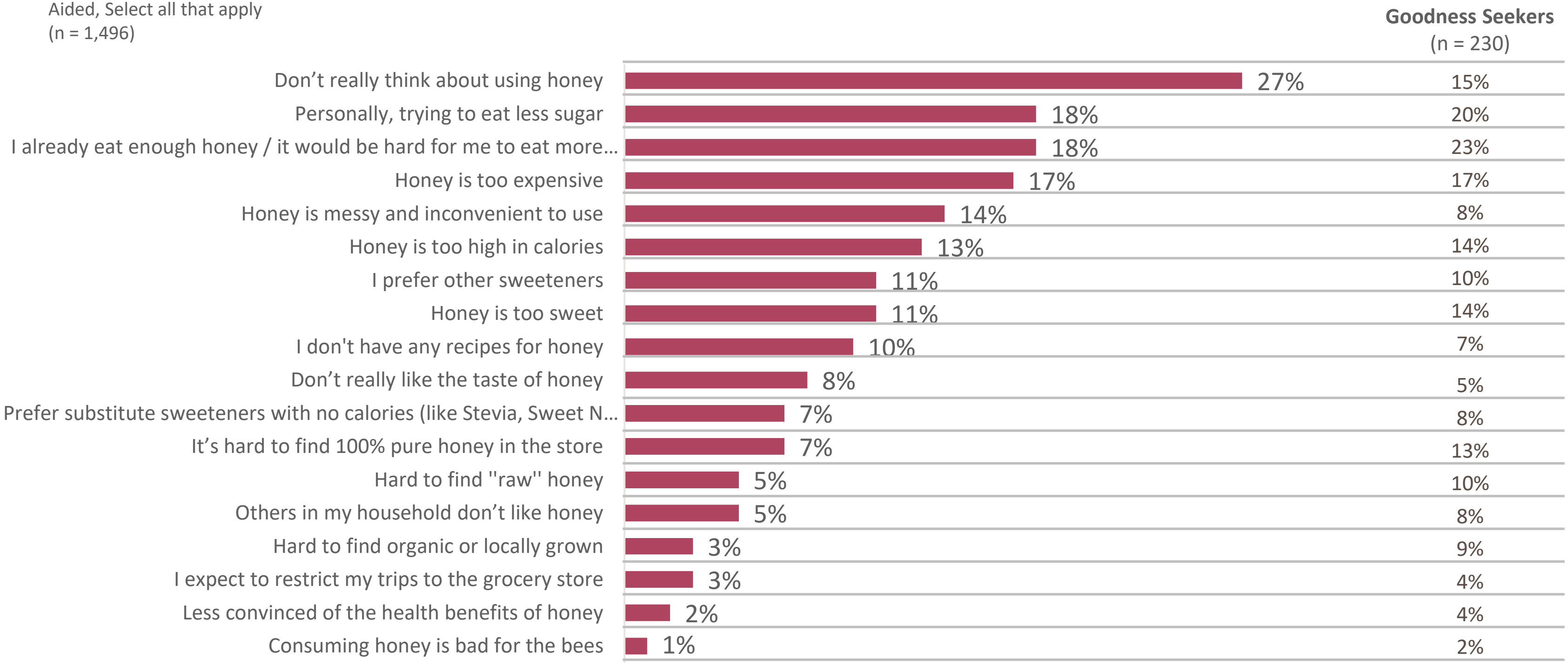
Appendix – Barriers & Substitutes

EAT SAME BARRIERS: Top of mind awareness and sugar avoidance, for both Gen Pop and Goodness Seekers, is a big reason to why their consumption will remain the same.

Barriers to More Frequent Consumption (“Eat Same Amount of Honey”)

Aided, Select all that apply

(n = 1,496)



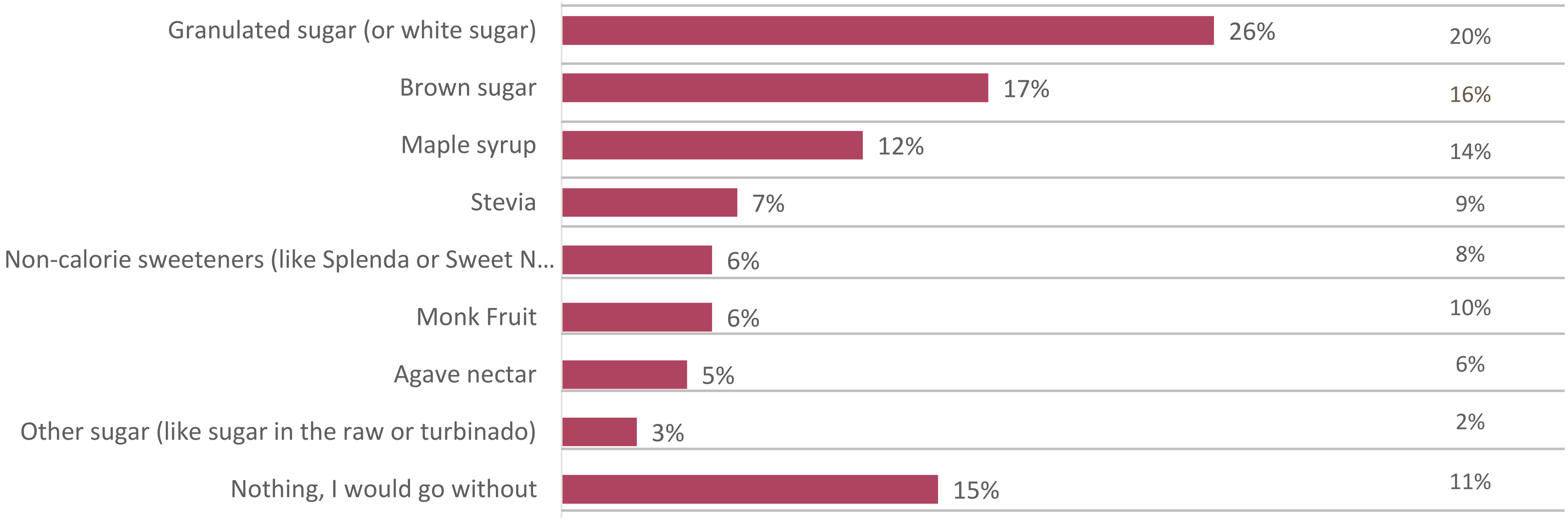
		Goodness Seekers (n = 230)
Don’t really think about using honey	27%	15%
Personally, trying to eat less sugar	18%	20%
I already eat enough honey / it would be hard for me to eat more…	18%	23%
Honey is too expensive	17%	17%
Honey is messy and inconvenient to use	14%	8%
Honey is too high in calories	13%	14%
I prefer other sweeteners	11%	10%
Honey is too sweet	11%	14%
I don't have any recipes for honey	10%	7%
Don’t really like the taste of honey	8%	5%
Prefer substitute sweeteners with no calories (like Stevia, Sweet N…	7%	8%
It’s hard to find 100% pure honey in the store	7%	13%
Hard to find "raw" honey	5%	10%
Others in my household don’t like honey	5%	8%
Hard to find organic or locally grown	3%	9%
I expect to restrict my trips to the grocery store	3%	4%
Less convinced of the health benefits of honey	2%	4%
Consuming honey is bad for the bees	1%	2%

Q26. And which of the following best describes why you don’t eat honey more frequently?

SUBSTITUTES: Granulated sugar remains the top substitute for honey among Gen Pop and Goodness Seekers. Both groups follow with brown sugar or maple syrup as additional substitutes.

Acceptable Honey Substitutes
(n = 504, Gen Pop)

Goodness Seekers
(n = 110)



Q27. If you could no longer have honey, which of the following would you most likely use instead?