

Food Labeling Study

January 2020



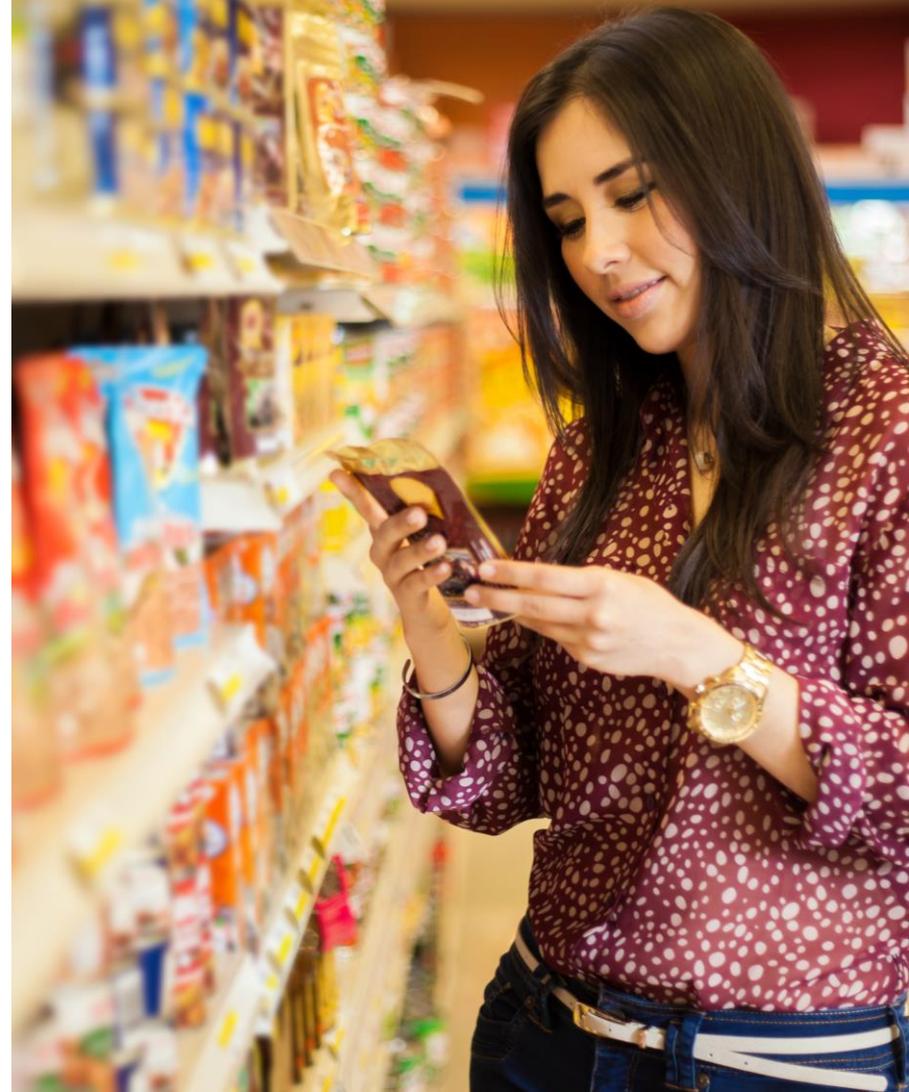
Background & Objectives

PROJECT BACKGROUND:

- The FDA is in the process of enacting new labeling rules and the National Honey Board wants to assess any impact the new labels may have on honey purchase intent and consumption.

PROJECT OBJECTIVES:

- Determine consumer reactions to the proposed FDA label and measure the extent to which the new labels impact label clarity, impact on honey purchase, and perceptions of honey as a natural or unprocessed food.



Methodology: Quantitative

STUDY APPROACH:

- Online survey in which respondents are exposed to one of three FDA labels (see next slide for detail)
- Total sample size of n=1,500 (500 respondents assessed each label)
- Surveyed consumers using closed-ended questions to understand impact on purchase and perceptions of honey containing “added sugars”
- Leveraged heat map technology and an open-ended question to understand consumer reactions to honey label elements



Three versions of honey labels were tested:

Label #1: Proposed Blank Space (Condensed)

Nutrition Facts	
Servings: 16, Serv. size: 1 Tbsp (21g) ,	
Amount per serving: Calories 60 , Total Fat 0g (0% DV), Sat. Fat 0g (0% DV), Trans Fat 0g, Cholest. 0mg (0% DV), Sodium 0mg (0% DV), Total Carb. 17g (6% DV), Fiber 0g (0% DV), Total Sugars 17g (34% DV)*, Protein 0g, Vit. D (0% DV), Calcium (0% DV), Iron (0% DV), Potas. (0% DV).	
*One serving adds 17g of sugar to your diet and represents 34% of the Daily Value for Added Sugars.	

Label #2: Current with Obelisk

Nutrition Facts	
16 servings per container	
Serving Size	1 tbsp (21g)
Amount Per Serving	
Calories	60
	% Daily Value*
Total Fat 0g	0%
Cholesterol 0mg	0%
Sodium 0mg	0%
Total Carbohydrate 17g	6%
Dietary Fiber 0g	0%
Total Sugars 17g	34%†
Protein 0g	
*The % Daily Value (DV) tells you how much a nutrient in a serving of food contributes to a daily diet. 2,000 calories a day is used for general nutrition advice.	
†One serving adds 17g of sugar to your diet and represents 34% of your Daily Value for Added Sugars.	

Label #3: Current No Obelisk

Nutrition Facts	
16 servings per container	
Serving Size	1 tbsp (21g)
Amount Per Serving	
Calories	60
	% Daily Value*
Total Fat 0g	0%
Cholesterol 0mg	0%
Sodium 0mg	0%
Total Carbohydrate 17g	6%
Dietary Fiber 0g	0%
Total Sugars 17g	34%
Protein 0g	
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Methodology: Qualitative

- In-person focus groups in Denver and San Francisco
- Heavy Honey Consumers and Natural Balancers, all self-reported declining consumption of honey or sugars
- Total of 48 respondents
- September 26 and October 8, 2019





Key Learnings:
Quantitative

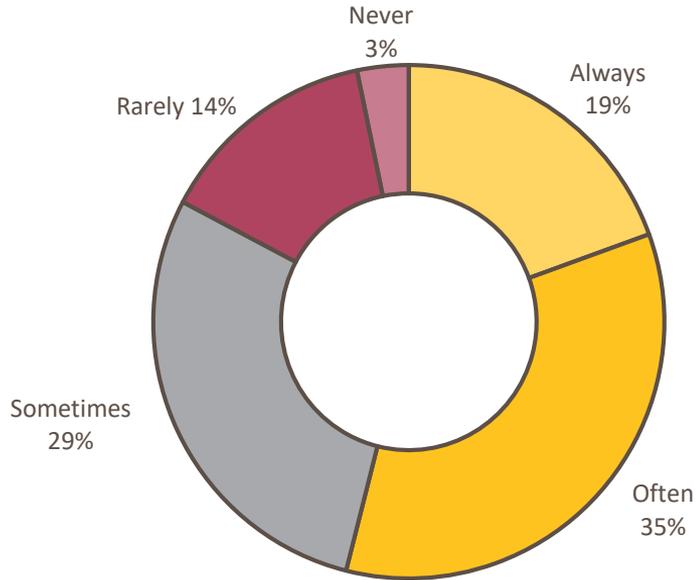
Key Takeaways

- All three FDA honey labels containing blank spaces and added sugar footnotes **creates confusion** amongst consumers
 - Consumers feel “**added sugars**” refer to **additional sweeteners**, beyond any naturally occurring sugars, that are included in a product’s ingredients
 - Consumers don’t understand what’s happening with the blank spaces; many believe it was a mistake or manufacturing error.
- The labels result in consumers being less confident that honey has no other sugars added to it
 - Honey is perceived as less natural and more processed.
- All three labels contributes to **declines in stated purchase intent**



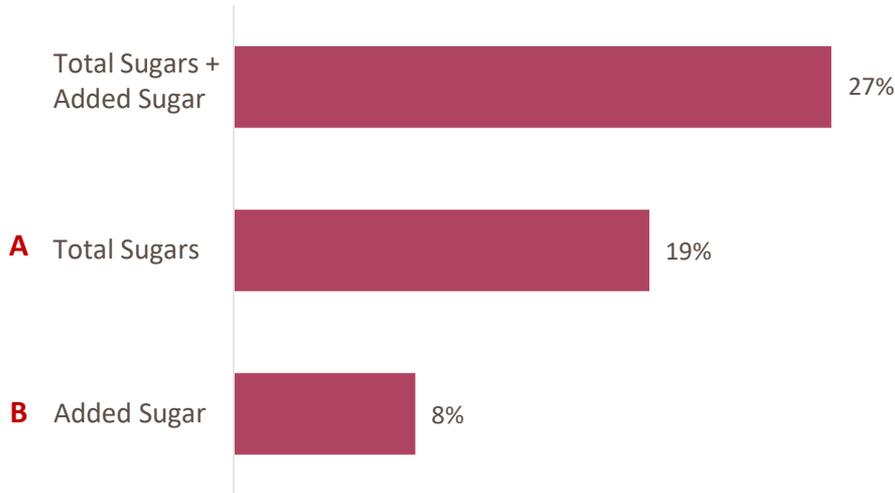
Over half of consumers in this study frequently look at nutrition labels; suggesting that this could have a real-world impact on purchase, perceptions, and confidence in honey.

Checking Food Nutrition Labels



On the condensed label, over a quarter of consumers find label elements communicating the amount of sugar to be confusing.

Percentage of Consumers Indicating Communication of Sugar Content is Confusing

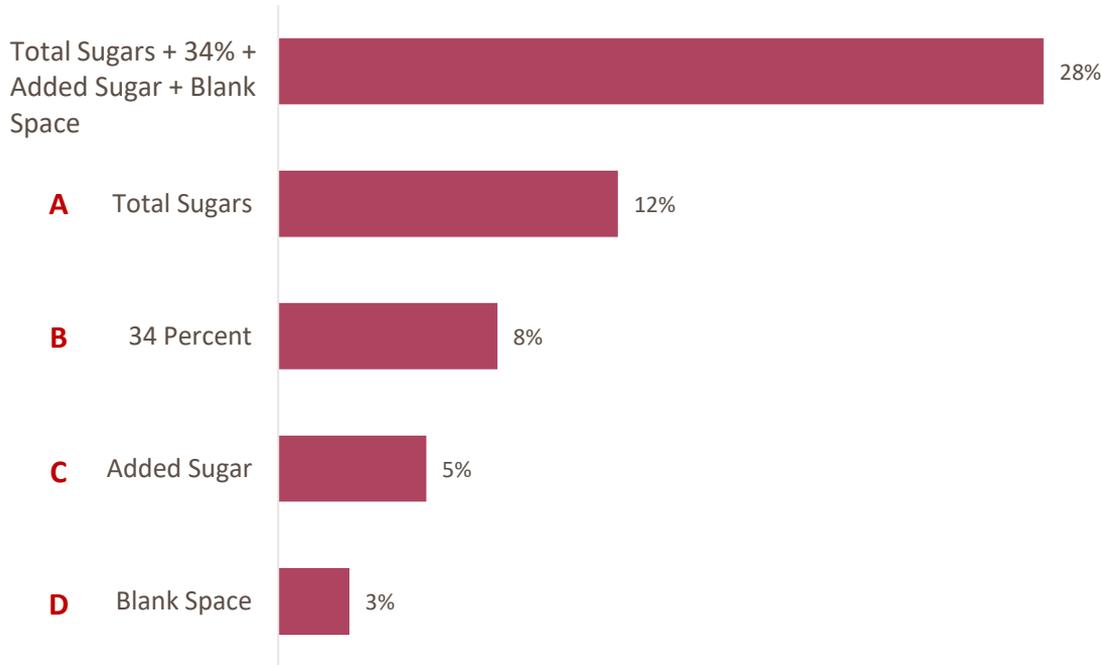


Label #1: Proposed Blank Space (Condensed)

Nutrition Facts Servings: 16, **Serv. size: 1 Tbsp (21g),**
 Amount per serving: **Calories 60**, **Total Fat** 0g (0% DV), Sat. Fat 0g (0% DV),
Trans Fat 0g, **Cholest.** 0mg (0% DV), **Sodium** 0mg (0% DV), **Total Carb.** 17g (6% DV),
 Fiber 0g (0% DV), **Total Sugars** 17g (**A** , 34% DV[†]), **Protein** 0g,
 Vit. D (0% DV), Calcium (0% DV), Iron (0% DV), Potas. (0% DV).
[†]One serving adds 17g of sugar to your diet and represents 34% of the Daily Value for Added Sugars. **B**

Similarly for the Obelisk label, over a quarter of consumers find the elements trying to communicate the amount of sugar confusing.

Percentage of Consumers Indicating Communication of Sugar Content is Confusing

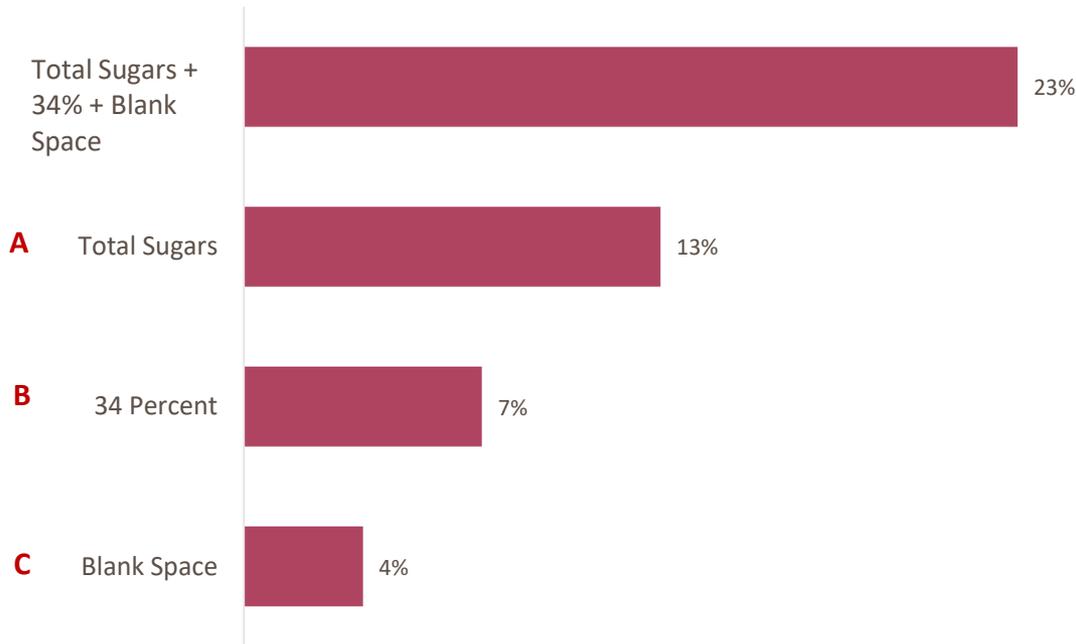


Label #2: Current with Obelisk

Nutrition Facts	
16 servings per container	
Serving Size	1 tbsp (21g)
Amount Per Serving	
Calories	60
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†One serving adds 17g of sugar to your diet and represents 34% of your Daily Value for Added Sugars.	

Again for the No Obelisk, about a quarter of respondents are confused by the way the amount of sugar is communicated.

Percentage of Consumers Indicating Communication of Sugar Content is Confusing



Label #3: Current No Obelisk

Nutrition Facts	
16 servings per container	
Serving Size	1 tbsp (21g)
Amount Per Serving	
Calories	60
	<small>% Daily Value*</small>
Total Fat 0g	0%
Cholesterol 0mg	0%
Sodium 0mg	0%
Total Carbohydrate 17g	6%
Dietary Fiber 0g	0%
Total Sugars 17g	A
	C B 34%
Protein 0g	

*The % Daily Value (DV) tells you how much a nutrient in a serving of food contributes to a daily diet. 2,000 calories a day is used for general nutrition advice.

SOURCE OF CONFUSION #1

The **blank spaces** included in all three labels drive confusion among respondents. Consumers believe it was a mistake or manufacturing error.

Can you please explain why you found this component of the label to be confusing?

Condensed

- *“There is a blank spot after total sugars. It looks like something is missing or there was an error.”*
- *“Why is there a portion of the information concealed, as represented by an area that is whited out?”*

Obelisk

- *“I believe this should be on the same line as the sugar. If the explanation had not been below, I would not know what the 34% referred to.”*
- *“There is no description in the left column. It took me more time to see the explanation on the bottom. A star beside 34% would have been much clearer (*) than a cross.”*

No Obelisk

- *“I don't know why the percent of total sugars is on the line below instead of directly across like the other categories.”*

SOURCE OF CONFUSION #2

When consumers see **total sugars** with no explanation it leads them to believe there are additional, unnatural sugars included in the product.

Can you please explain why you found this component of the label to be confusing?

Condensed

- *“I do know for example, that products are often mixtures of itself and sugar, including high fructose corn syrup, so to say, ‘total sugars’ seems problematic.”*

Obelisk

- *“Sugars in plural which implies there was more than just the honey's own sugar in it.”*
- *“It does not specify which sugars are present in the food or if there are additives like HFCS in the product.”*

No Obelisk

- *“It doesn't tell me the percentage of natural sugar vs additives”*
- *“Total sugars doesn't say if it's natural or if additional sugars have been added.”*

SOURCE OF CONFUSION #3

Similar to total sugars, the footnote about **added sugars** lacks clarity and makes respondents think other types of sugars are being added to the honey.

Can you please explain why you found this component of the label to be confusing?

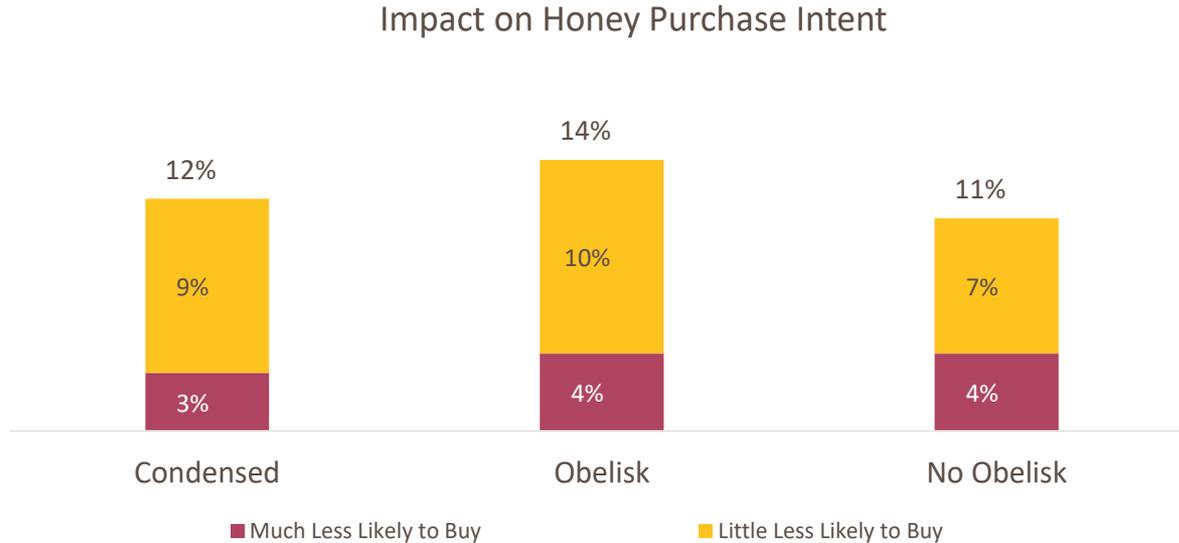
Condensed

- *“Using the term 'Added Sugars' is very confusing in absence of an ingredient list. Have other ingredients been added or not?”*
- *“It is confusing because there really is no added sugar, it is what honey has in it naturally. But it does sound like it would.”*

Obelisk

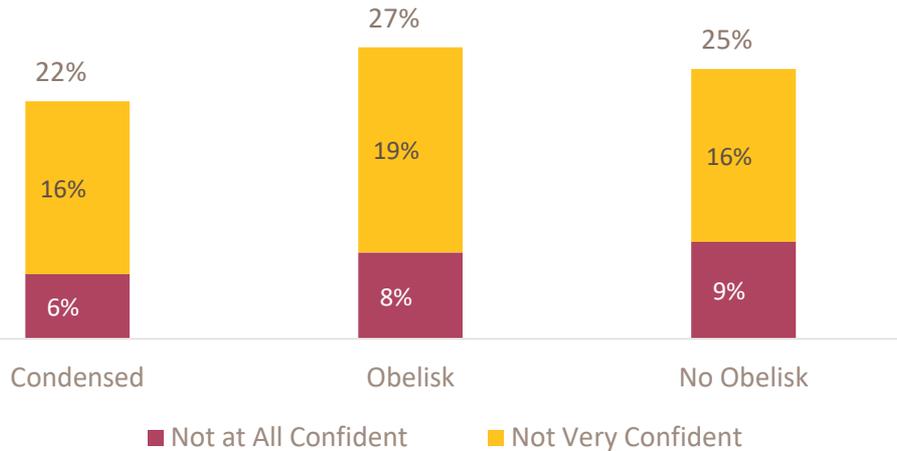
- *“This implies that the sugar is added but doesn't specifically say what.”*
- *“Normally honey does not have added sugar, so I was a bit unclear about the statement referring to the added sugar (or is this simply the amount of sugar from the honey itself included in this statement?)”*

The three labels impact honey purchase intent. Over 10% of people say they would be less likely to buy the product.



After seeing the labels, roughly 25% of consumers are concerned that honey contains added sugars.

Confidence No Other Sugars are Added



“Using the term 'Added Sugars' is very confusing. Have other ingredients been added or not?”

“Because it states that one serving adds 17 g to your diet and represents 34% of Daily Value for "ADDED" sugars. Is sugar added to this? It's not clear to me.

“I'm not confident it's only natural sugar. 17 grams of sugar might indicate some artificial sweetener”

A row of wooden beehives in a field of sunflowers, overlaid with a decorative dotted line.

Key Learnings: Qualitative

The hanging 34% is confusing and consumers don't know what it is related to.

-
- *“What’s the 34% for?”*
- *“Is that 34% of what you are supposed to have? Not directly on the same line as the 17g of sugar, directly below it, so I don’t really understand. Kind of misleading.”*
- *“Why isn’t it just on the same line as the sugars?”*
- *“It is the daily value of your carb intake for the day. But then why isn’t it on the same line?”*

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% Daily Value*	
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The empty space is confusing and feels misleading.

- *“I don’t understand that space at the bottom – it looks like some mystery product.”*
- *“To me it is just misleading – something missing, or something they don’t want to tell you about – that is what is weird.”*

The added sugar line makes them believe the honey is not pure

- *“So are they adding other sugar to it? I think yes!”*
- *“Added sugar – does that mean it is high fructose corn syrup?”*

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Fiber 0g (0% DV), Total Sugars 17g (, 34% DV[†]), **Protein** 0g,
Vit. D (0% DV), Calcium (0% DV), Iron (0% DV), Potas. (0% DV).

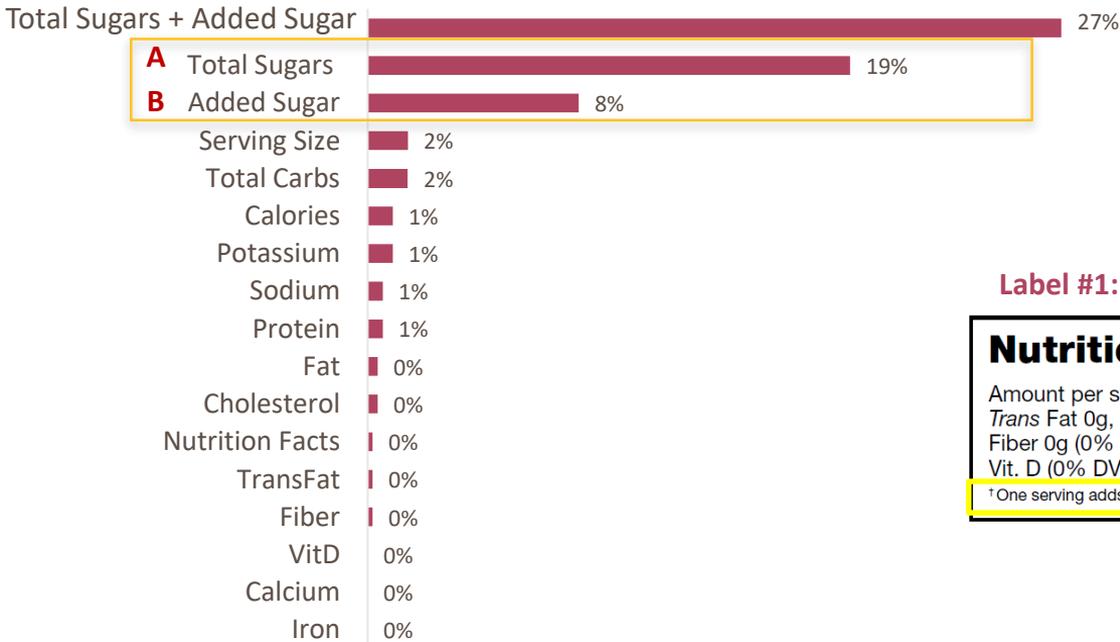
[†] One serving adds 17g of sugar to your diet and represents 34% of the Daily Value for Added Sugars.



Thank You

When looking at the condensed label, respondents find the blank space next to total sugars and the added sugar footnote the most confusing, unclear parts.

What, if anything, is confusing or unclear about this label?

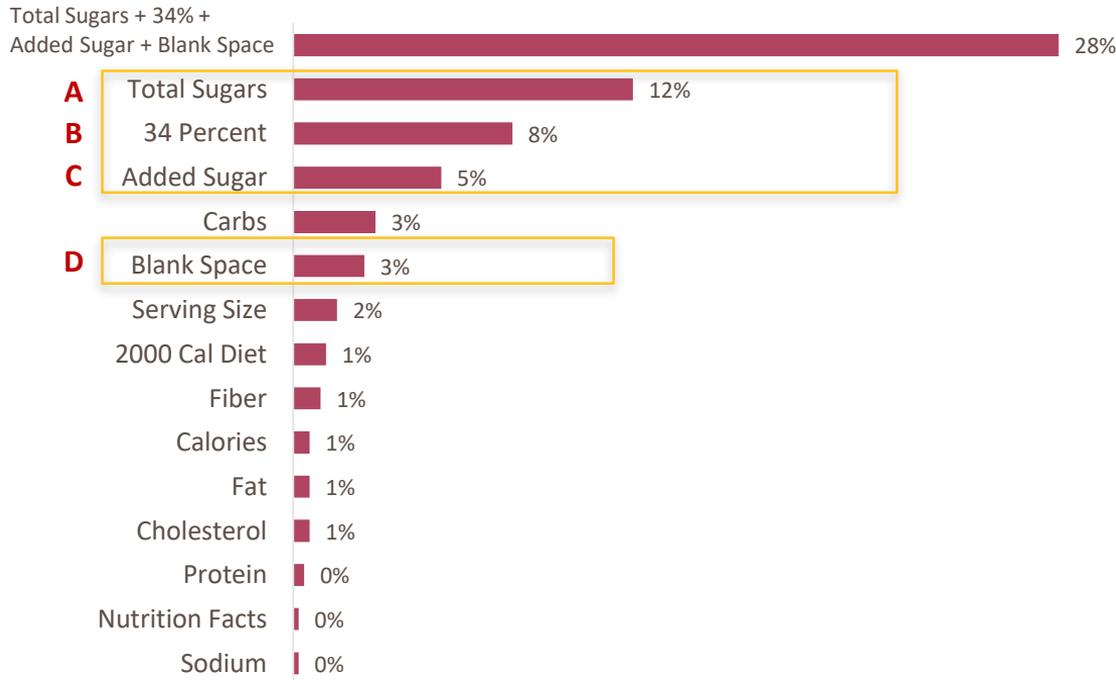


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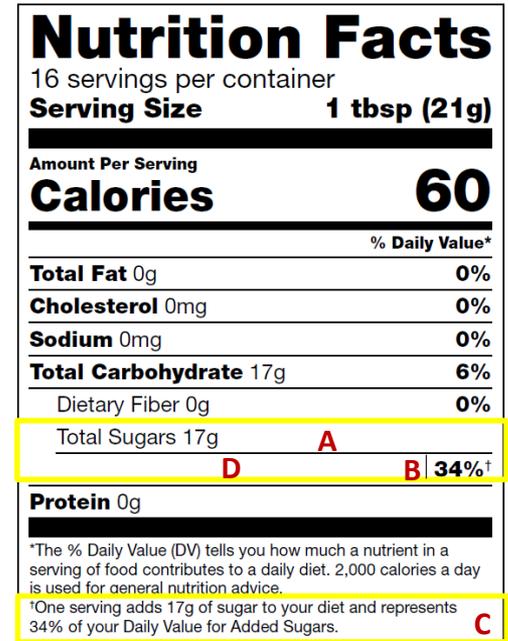
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[†] One serving adds 17g of sugar to your diet and represents 34% of the Daily Value for Added Sugars. **B**

Similarly for the Obelisk label, consumers find all the elements trying to communicate the amount of sugar confusing.

What, if anything, is confusing or unclear about this label?

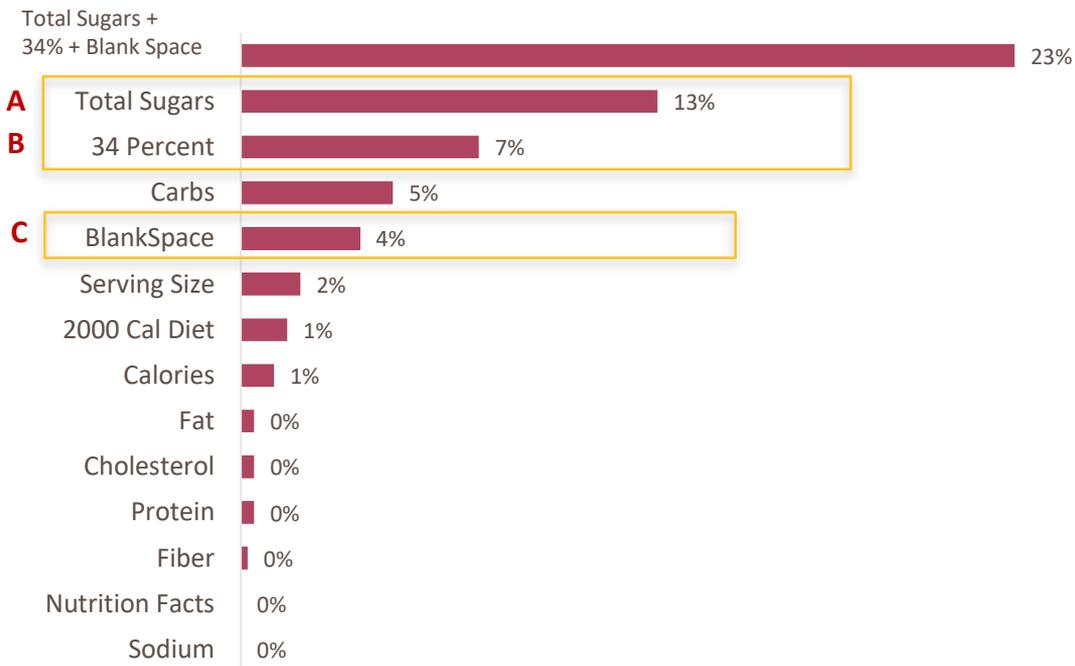


Label #2: Current with Obelisk



For the No Obelisk, respondents are also confused by the way the amount of sugar is communicated.

What, if anything, is confusing or unclear about this label?



Label #3: Current No Obelisk

