Consumer A&U Report

July 2022

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 2022
- Online quantitative survey conducted with US consumers (primary food shoppers)
- Sample
  - N = 2051 (General Population);
  - n=433 (Goodness Seekers)
  - Balanced to census for age & ethnicity
- How to Read This Report

Symbol Key	
↑	Statistically significant at 95% ; increase vs. 2020
↓	Statistically significant at 95%; decrease vs. 2020
⁂	New for 2021

Sample Comparison

	2018 Total Sample	2019 Total Sample	2020 Total Sample	2021 Total Sample	2022 Total Sample	Percentage Point Change (2022–2021)
Gender						
Male	49%	49%	49%	49%	49%	-
Female	51%	51%	51%	51%	51%	-
Age						
18–24	13%	12%	10%	9%	8%	-1
25–34	21%	22%	19%	19%	16%	-3
35–45	23%	22%	21%	21%	22%	1
46–54	17%	19%	19%	20%	22%	2
55–64	17%	16%	18%	19%	20%	1
65–75	9%	9%	12%	13%	11%	-2
HH Income						
Less than $50K	49%	47%	50%	40%	36%	-4
$50,000 but less than $75,000	19%	18%	17%	16%	18%	2
$75,000 but less than $100,000	14%	15%	12%	15%	17%	2
$100K+	17%	18%	21%	26%	28%	2
Marital & Living Situation						
Not married, not living with partner	25%	31%	28%	23%	25%	2
Married or living with partner	75%	69%	72%	77%	75%	-2

Goodness Seeker A&U Demographics

The demographic/life-stage profile of 2022 is skewed male and higher income

55% Male

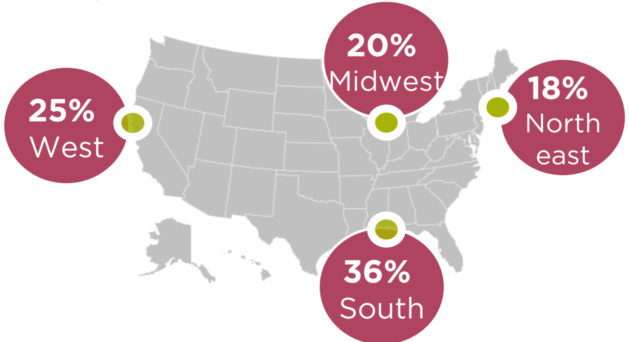
45% Female

48% 25-34
52% 35-45

82%
Married or living with sig. other

↓ **23%** $49k and under
18% $50k-$74k
↑ **21%** $75k-$100k
38% $100k +

77% ↑
Have children in the home



Insights & Implications

Last Year’s Growth Slows Down

- Much of the gains in positive story recall from last year came back down this year, with honey seeing a small decrease than other sweeteners.
- All attributes for health and appeal of honey are up across the board for Gen Pop, but stagnated or shrank for Goodness seekers.
- After incredible increases in reported usage levels last year, usage leveled out, with light users transitioning to non-users among the Gen Pop
- Despite this, honey remains the favored sweetener for Goodness Seekers and is close behind sugar with Gen Pop

Goodness Seekers are still our biggest fans, but softening in sustainability concerns.

- We see both in preference and overall usage, Goodness Seekers continue to prefer honey over all other sweeteners.
- Heavy users among Goodness Seekers increased +2 points, on top of impressive gains from last year.
- However, Goodness Seeker concern about the environment and sustainability is not as strong:
    - Declines in awareness of declining bee population, now lower than Gen Pop
    - Declines in believing honey is very good for bee health
    - Significant declines in sustainability concerns across the board (although still more concerned than Gen Pop)
    - Strong declines in very concerned about honey being adulterated

Implication:

Stay the course focusing on Goodness Seekers as our core target, but dig deeper into why GS may be less concerned about sustainability. Use upcoming focus groups to gain deeper understanding and assess trends in next year's A&U before making any shifts.

Continue focus on "why honey" and showcasing value

- The most motivating messages for increased honey consumption are focused on the health aspects on honey, with the antioxidant and vitamin statements doing the best.
- Honey bee health is a close second in motivation, with 2 of their statements in the top 5 for Gen Pop.
- The price paid for honey continues to increase YOY, with the amount being purchased on sale declining. Honey as "a good value" is an area for improvement.
- Interesting shifts in usage throughout the day, with stronger morning usage and less evening, baked good and recipe usage.

Implication:

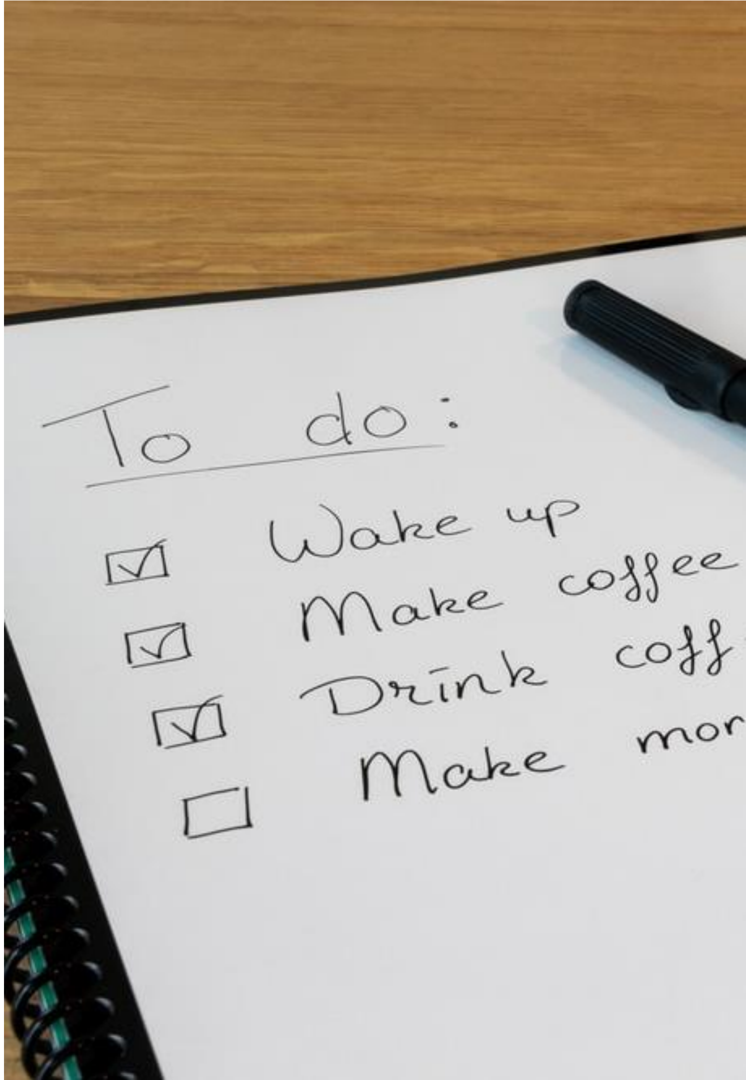
Continue to showcase the value of honey by focusing on "why honey" through the dual strategy of good for me and good for the planet. Although we are seeing shifts in usage, heavy and medium users are holding steady and using honey in different ways throughout the day.

Planning Considerations/Checklist

- **Showcase Value:** Ensure every program elevates honey above other sweeteners and demonstrates why honey is worth the cost

- **Stay focused on Goodness Seekers:** Last year, we were looking to leverage the influence of GS on the Gen Pop, but it appears we have work to do to re-engage GS in honey's sustainability impact

- **Balance of strategic pillars:** Maintain equal balance between Health & Planet pillars, don't forget about Good for Me, as that is tied to most motivating reason to eat more honey



Attitudes, Awareness & Usage

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

Unaided awareness for sweeteners saw decreases in awareness for many of the top half sweeteners. Sugar saw the largest decreases, where as honey was one of the few highly recognized sweeteners to not drop on awareness this year. This trend goes similarly for Goodness Seekers, who didn't recall stevia as much either.

Sweetener Awareness – Top 15 Unaided
(n = 2051: Gen Pop)

Sweetener	Gen Pop	Change	Goodness Seeker (n=433)	Goodness Seeker (2022 vs. 2021)
Sugar (unspecified)	50%	-7pts	34% ↓	-5
Honey	30%	1pts	29%	0
Stevia	21%	-1pts	19% ↓	-10
Splenda	16%	-1pts	14%	0
Sweet 'N Low	15%	-1pts	9% ↓	-3
Equal	7%		4% ↓	-3
Agave/Agave Nectar/Syrup	5%		5% ↓	-3
Brown Sugar	4%		2% ↓	-4
Truvia	3%		5%	1
Aspartame	3%		3%	-2
Fruits/fruit juices	2%		3%	0
Maple Syrup	2%		2% ↓	-3
Monk Fruit	3%		3%	-1
Raw Sugar/Sugar in the raw	2%		2%	-1
Cane Sugar	2%		2%	0

↑ ↓

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): Honey gains ground on sugar in 2022.

While honey remains consistent with their status since 2020, other top sweeteners like sugar dipped in 2022.

Unaided Sweetener Awareness	2018	2019	2020	2021	2022	2022 vs 2021
Sugar						
Gen Pop (n = 2,000)	33%	63%	58%	57%	50% ↓	-7pts
Honey						
Gen Pop (n = 2,000)	**22%**	**36%**	**31%**	**29%**	**30%**	**1pt**
Stevia						
Gen Pop (n = 2,000)	33%	29%	24%	22%	21%	-1pt
Splenda						
Gen Pop (n = 2,000)	30%	22%	20%	17%	16%	-1pt
Sweet 'N Low						
Gen Pop (n = 2,000)	29%	19%	17%	16%	15%	-1pt
Equal						
Gen Pop (n = 2,000)	16%	11%	8%	8%	7%	-1pt
Agave Nectar/Syrup						
Gen Pop (n = 2,000)	8%	8%	6%	5%	5%	0pt

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 continues to be low

Jam/jelly saw the only significant change this year, where as Honey remained low on its awareness as a spread.

Morning Toppings/Spread Awareness - Unaided
(n = 2051: Gen Pop)

	Gen Pop		Goodness Seeker (n=433)	Goodness Seeker (2022 vs. 2021)
Butter/margarine based spreads	25%		18%	-1%
Peanut and Nut Butters	23%		17%	-2%
Jam/Jelly/Preserves/Fruit Spreads	22%	↓	15%	0%
Cream cheese	16%		16%	0%
Hazelnut Spread(Nutella)	14%		14%	1%
Mayo	10%		7%	-2%
Honey	4%		3%	-1%

↑ ↓

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 of spreads saw small decreases across the board from 2020-2021.

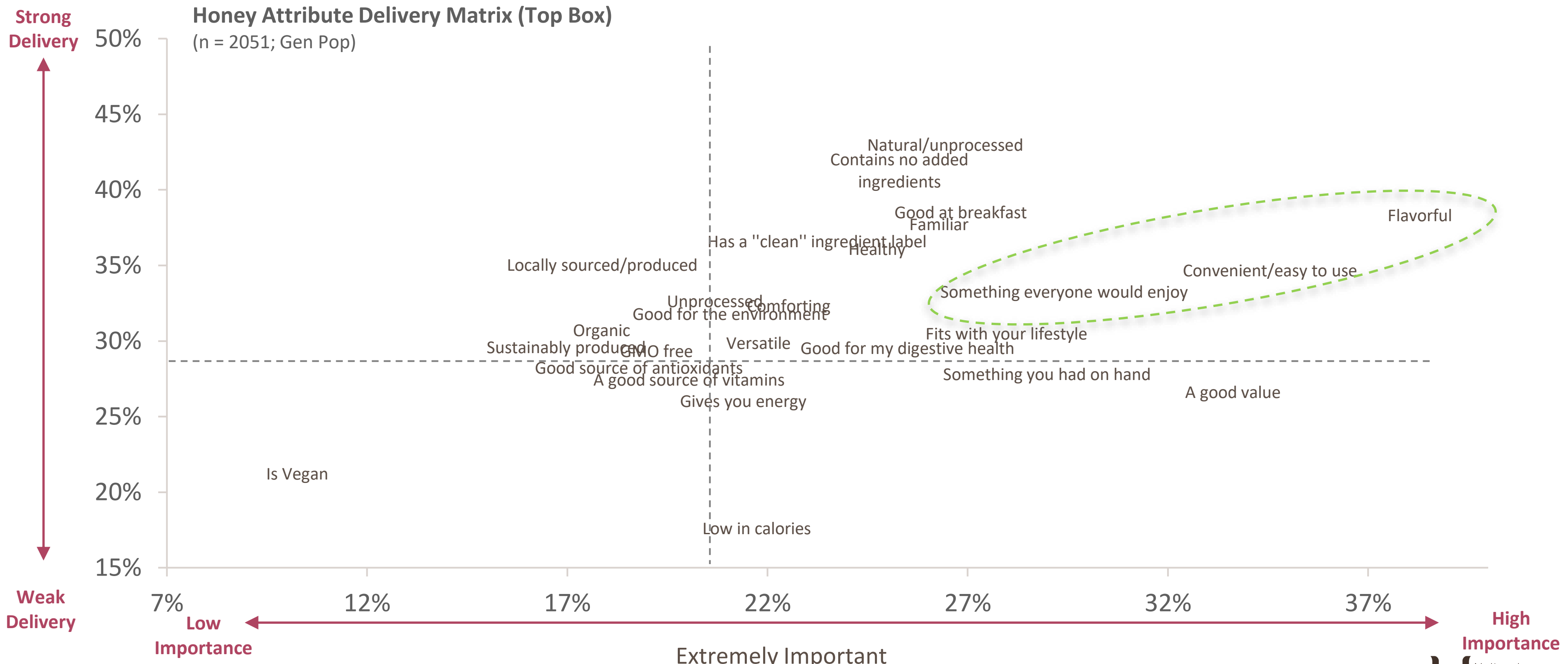
While Jam saw the only significant shift, all but hazelnut spread saw a decrease this year.

Unaided Morning Spreads Awareness	2018	2019	2020	2021	2022	2022 vs 2021
Butter/margarine-based spreads						
Gen Pop (n = 2,051)	51%	55%	27%	27%	25%	-2pts
Peanut/Nut Butters						
Gen Pop (n = 2,051)	45%	50%	29%	25%	23%	-2pts
Jam/Jelly/Preserves/Fruit Spreads						
Gen Pop (n = 2,051)	27%	31%	30%	27%	22%	-5pts ↓
Cream cheese						
Gen Pop (n = 2,051)	23%	24%	16%	18%	16%	-2pts
Hazelnut Spread						
Gen Pop (n = 2,051)	19%	16%	14%	12%	14%	2pts
Honey						
Gen Pop (n = 2,051)	**11%**	**11%**	**5%**	**5%**	**4%**	**-1pts**

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)

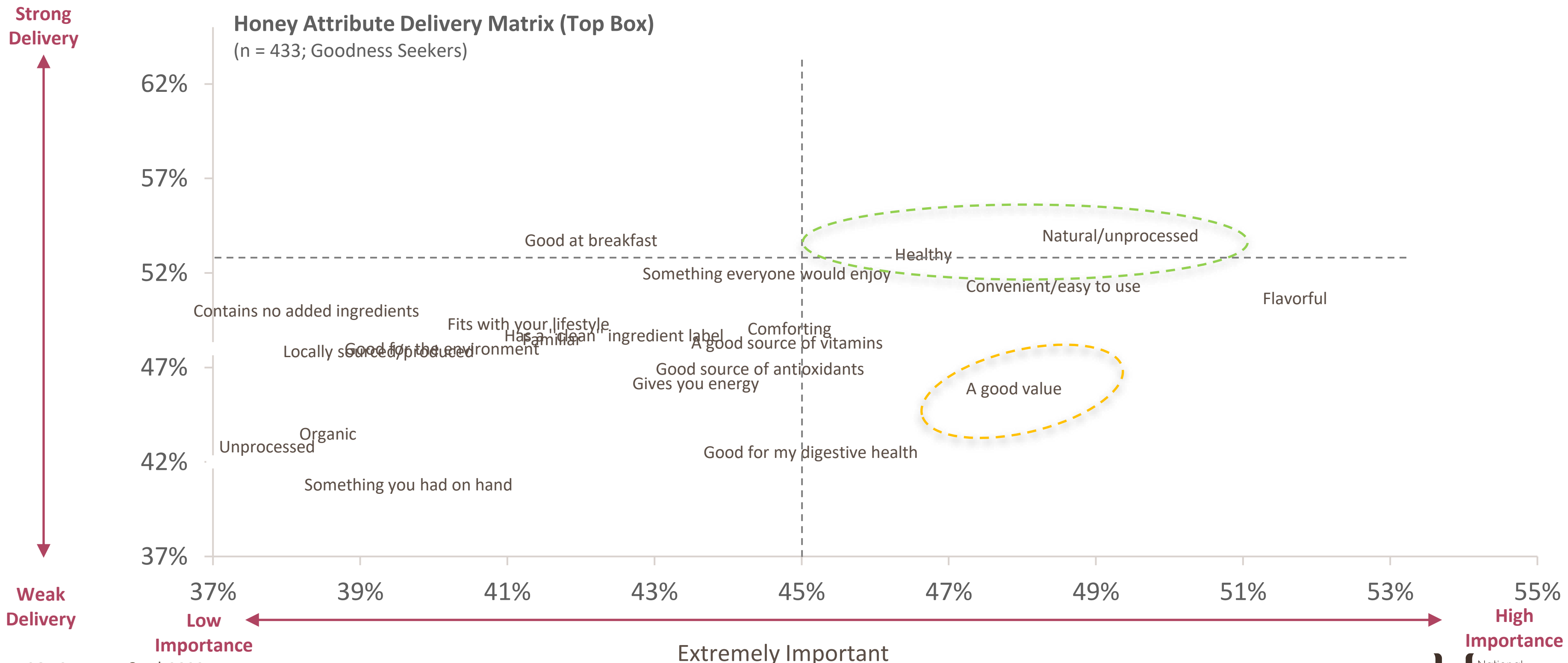
GEN POP HONEY IMPORTANCE/DELIVERY: Flavorful, Natural, and Simplistic

Honey gets credit for being flavorful, convenient/easy to use, and something everyone would enjoy. Other attributes like being natural, containing no added ingredients and fits with their lifestyle are also well regarded.



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

Goodness Seekers give honey the most credit for being healthy and natural, as well as being easy to use. Once again value is brought up as a weaker delivery for honey, as well as being good for digestive health.



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

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

Being natural, healthy and having no added ingredients continue to stand out for honey.

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

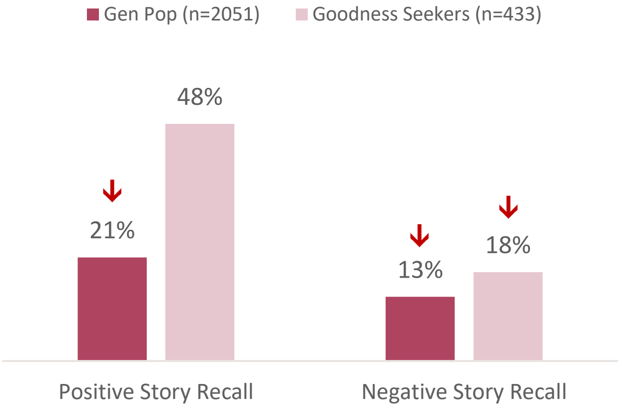
	2019 Gen Pop	2020 Gen Pop	2021 Gen Pop	2022 Gen Pop	2022 vs 2021	2021 Goodness Seekers	2022 Goodness Seekers	2022 vs 2021
BROAD APPEAL/VERSATILITY								
Something everyone would enjoy	73%	73%	76%	78%	2	92%	90%	-2
Something you had on hand	73%	73%	78%	80%	2	89%	90%	1
Versatile	71%	72%	76%	78%	2	88%	90%	2
HEALTH/NATURAL								
Healthy	76%	79%	81%	83%	2	90%	91%	1
Natural (previously Natural/Unprocessed)	85%	87%	87%	88%	1	96%	92%	-4
A good source of vitamins	60%	69%	72%	74%	2	88%	87%	-1
Gives you energy	62%	70%	72%	73%	1	86%	87%	1
Organic	63%	67%	71%	73%	2	89%	89%	0
Locally sourced/produced	68%	75%	76%	78%	2	91%	90%	-1
GMO free	60%	66%	68%	72%	4	86%	85%	-1
Low in calories	46%	50%	54%	56%	2	74%	73%	-1
Contains no added ingredients	79%	81%	81%	84%	3	92%	91%	-1
Labeled as ''raw''	60%	66%	68%	71%	3	86%	86%	0
Unprocessed	71%	74%	74%	77%	3	86%	85%	-1
Has a "clean" ingredient label	73%	76%	77%	80%	3	91%	89%	-2
Good source of antioxidants	-	70%	74%	76%	2	90%	89%	-1
Good for my digestive health	-	72%	73%	77%	4	89%	88%	-1
Is vegan	-	52%	55%	58%	3	74%	73%	-1
FLAVOR & TASTE								
Flavorful	84%	84%	86%	87%	1	94%	93%	-1
CONVENIENT								
Convenient/easy to use	74%	78%	80%	83%	3	94%	91%	-3
Something you had on hand	73%	73%	-	80%	-	-	90%	-
A GOOD VALUE	68%	68%	73%	74%	1	87%	87%	0
FITS MY LIFESTYLE	66%	68%	73%	74%	1	93%	92%	-1
COMFORTING/FAMILIAR								
Familiar	80%	82%	85%	85%	0	95%	92%	-3
Comforting	72%	76%	77%	80%	3	89%	91%	2
GOOD AT BREAKFAST	79%	77%	81%	82%	1	93%	91%	-2
SUSTAINABILITY								
Sustainably produced	-	75%	76%	78%	2	92%	88%	-4
Good for the environment	-	75%	74%	77%	3	89%	86%	-3

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

POSITIVE VS. NEGATIVE STORY RECALL: Story recall in general dropped for multiple sweeteners, with only Honey not seeing a significant drop.

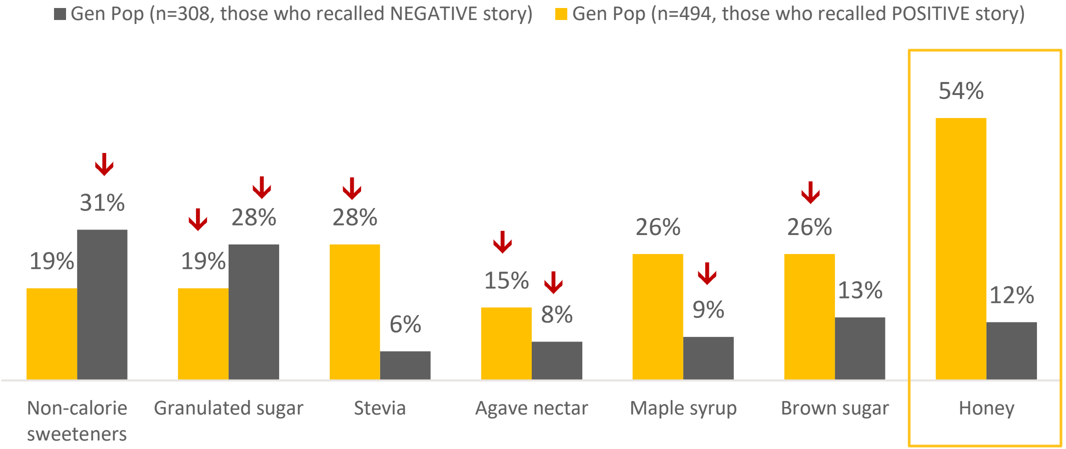
Recall of positive stories about honey did fall, as did negative story recall for honey. Neither of these declines were significant. Other sweeteners like brown sugar and stevia, saw a statistically significant drop in positive stories.

Sweetener Story Recall
(Among those recalling positive or negative story)



Gen Pop vs YA	-4 pts	-2 pts
GS vs YA	-3 pts	-7 pts

Sweetener Mentioned in Story
(Among those recalling positive or negative story)

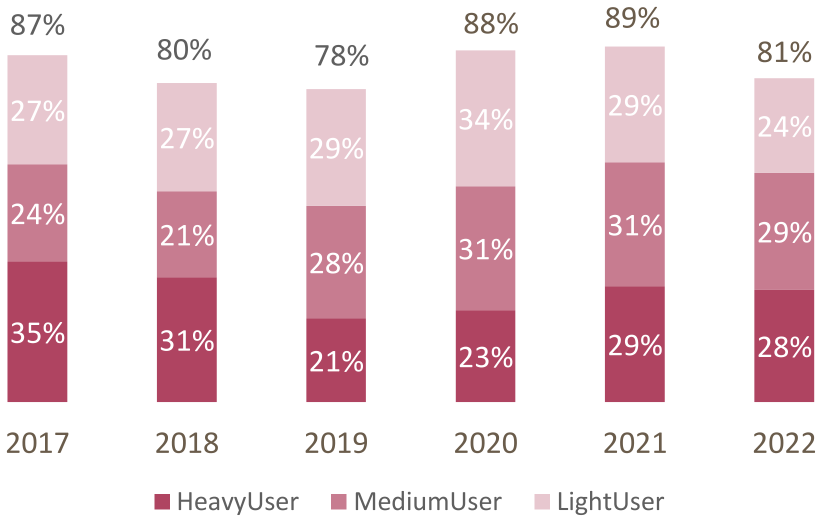


0pts / -10 pts	-5pts / -4pts	-6pts / -3pts	-6pts / -4pts	0pts / -4pts	-7pts / -3pts	-2pts / -3pts

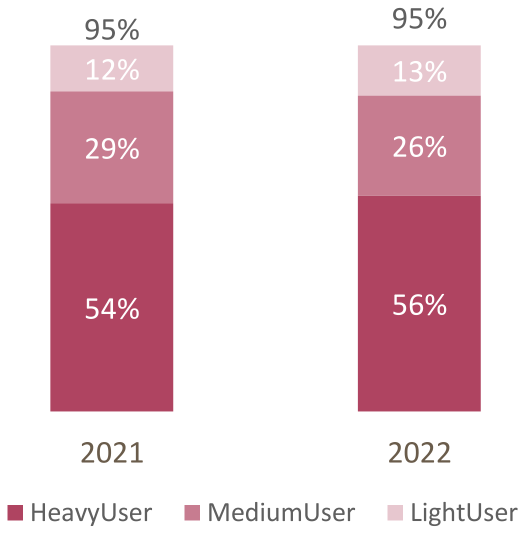
Q6. Within the past year, can you recall reading any articles or hearing a POSITIVE story about sweeteners in any public media, such as newspapers, magazines, radio, TV or online?
Q7D. Within the past year, can you recall reading any articles or hearing a NEGATIVE story about sweeteners in any public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

USAGE FREQUENCY (2017-2021): Honey usage saw a decrease this year compared to the last two measurements. Honey has fallen to 2019 levels. This was primarily due to light users shifting to non-users. Goodness Seekers saw minimal change.

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%	19%

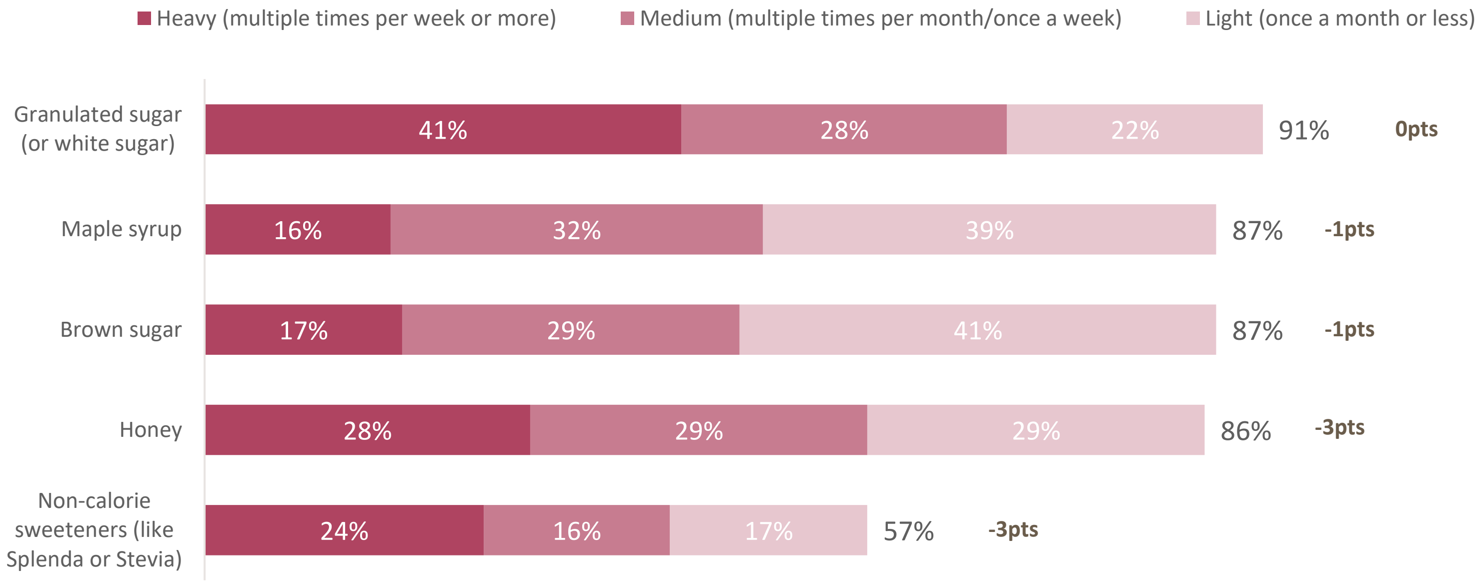
5%	5%

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 remained similar if not dropped from last year.

We see the top four sweeteners saw either minimal change or a decrease in the case of Honey, which fell 3 pts this year. Honey does still maintain the second highest amount of heavy and medium users among the other sweeteners.

How often do you eat the following sweeteners, either by themselves or in other foods or beverages?
(n = 2051, Gen Pop)

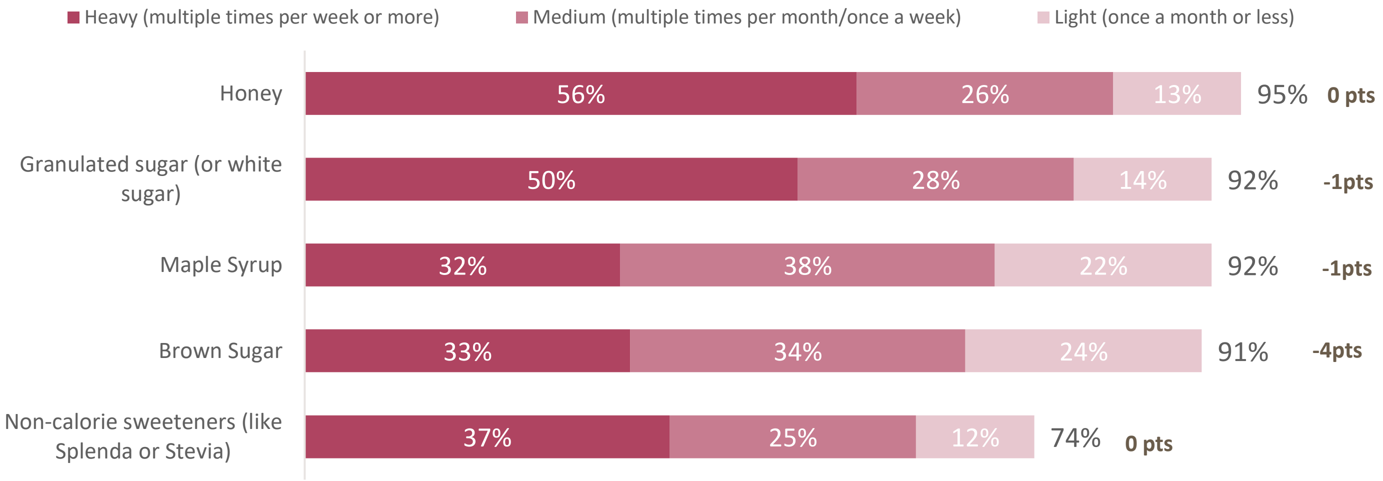


 Q10A. Thinking about a typical week, how often do you usually eat the following types of sweeteners, either by themselves or in other foods or beverages.

GOODNESS SEEKERS USAGE: Honey leads in highest usage among Goodness Seekers.

Due to a decrease by brown sugar, honey claims the lead among goodness seekers in terms of usage. Their high number of heavy users allows them to stand out from the group.

How often do you eat the following sweeteners, either by themselves or in other foods or beverages?
(n = 433, Goodness Seeker)

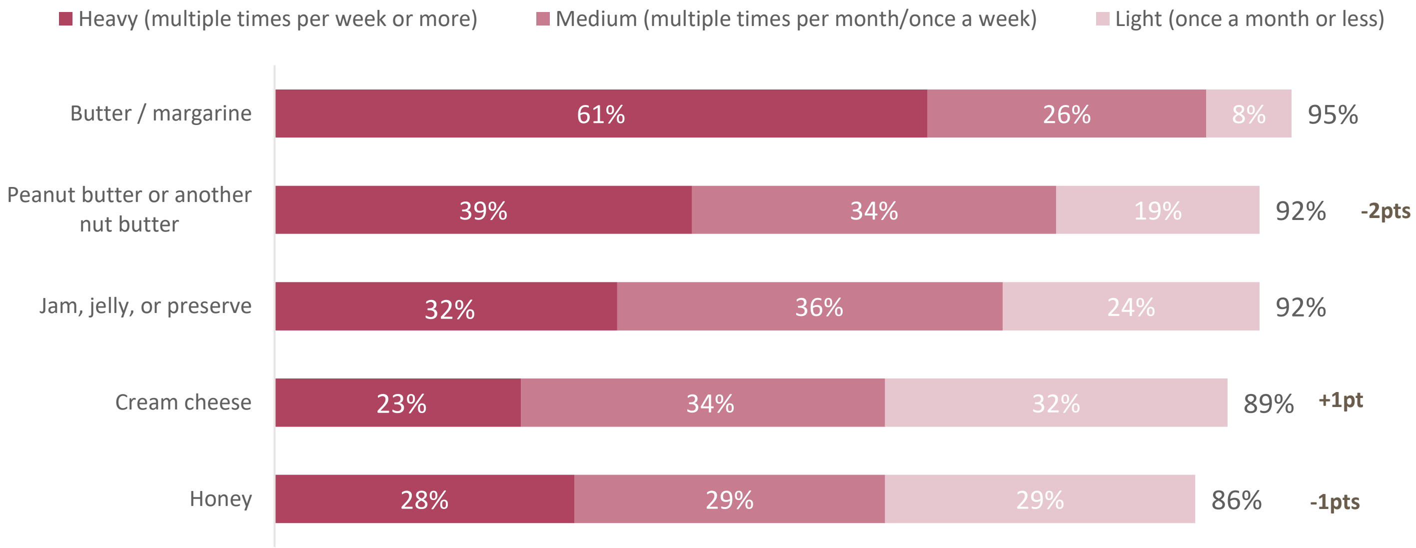


Q10A. Thinking about a typical week, how often do you usually eat the following types of sweeteners, either by themselves or in other foods or beverages.

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

Spread consumption saw minimal usage increases compared to large increases from last year. Honey still sits in 5th, slightly behind the rest of the products.

How often do you eat the following toppings, either by themselves or in other foods or beverages?
(n = 2051, Gen Pop)

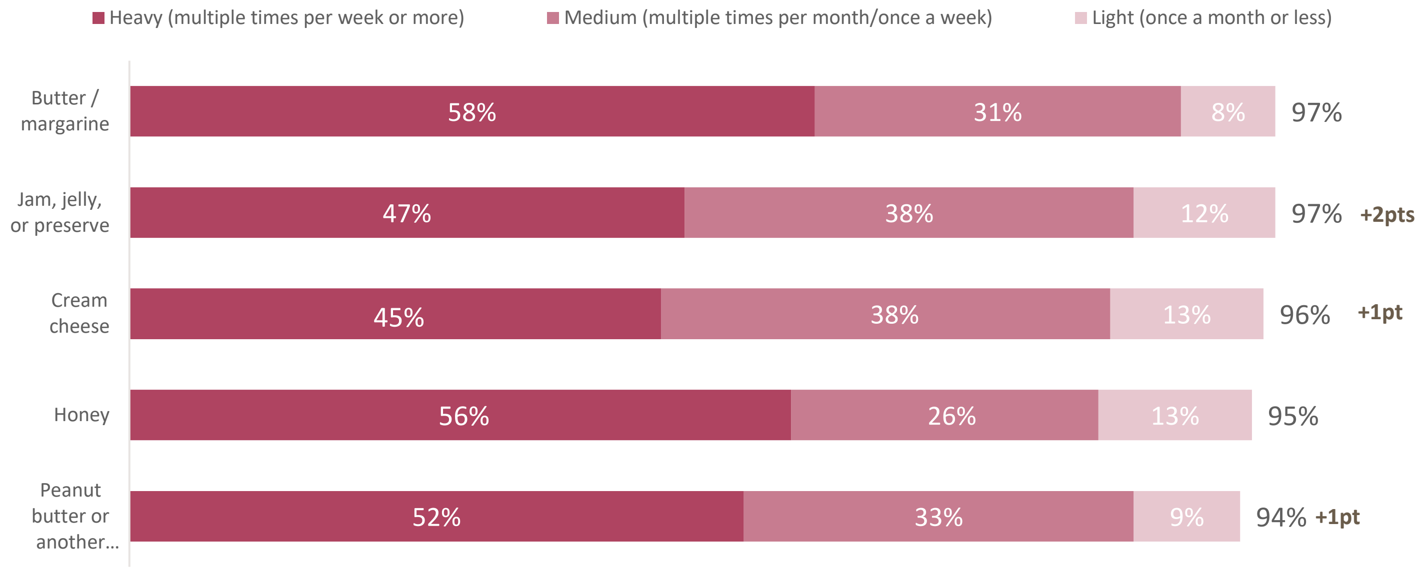


Q10A. Thinking about a typical week, how often do you usually eat the following types of spreads or toppings, either by themselves or in other foods or beverages.

GOODNESS SEEKERS USAGE: Similarly, little changed for Goodness Seekers in spread usage.

The Goodness Seeker is much more likely to use certain spreads and toppings vs the general population, especially the heavy users. Honey did not move from last year.

How often do you eat the following toppings, either by themselves or in other foods or beverages?
(n = 433, 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 saw decreases in comparison, specifically among Gen Pop.

Typical Honey Usage Across Forms/Occasions (Summary of Top 4 Box)
(n= 1,663, Gen Pop; n = 405, Natural Balancer)

Breakfast	Lunch	Dinner
Gen Pop (56% 1pt)	Gen Pop (17% ↓-4pts)	Gen Pop (17% -2pts)
G. Seeker (64% 5pts)	G. Seeker (25% 1pts)	G. Seeker (24% -4pts)

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

TYPICAL USAGE (2018 – 2022): Use during breakfast and with tea/coffee saw the only increases

We saw significant decreases with baked good usage and in recipes, with most other use cases remaining similar in usage.

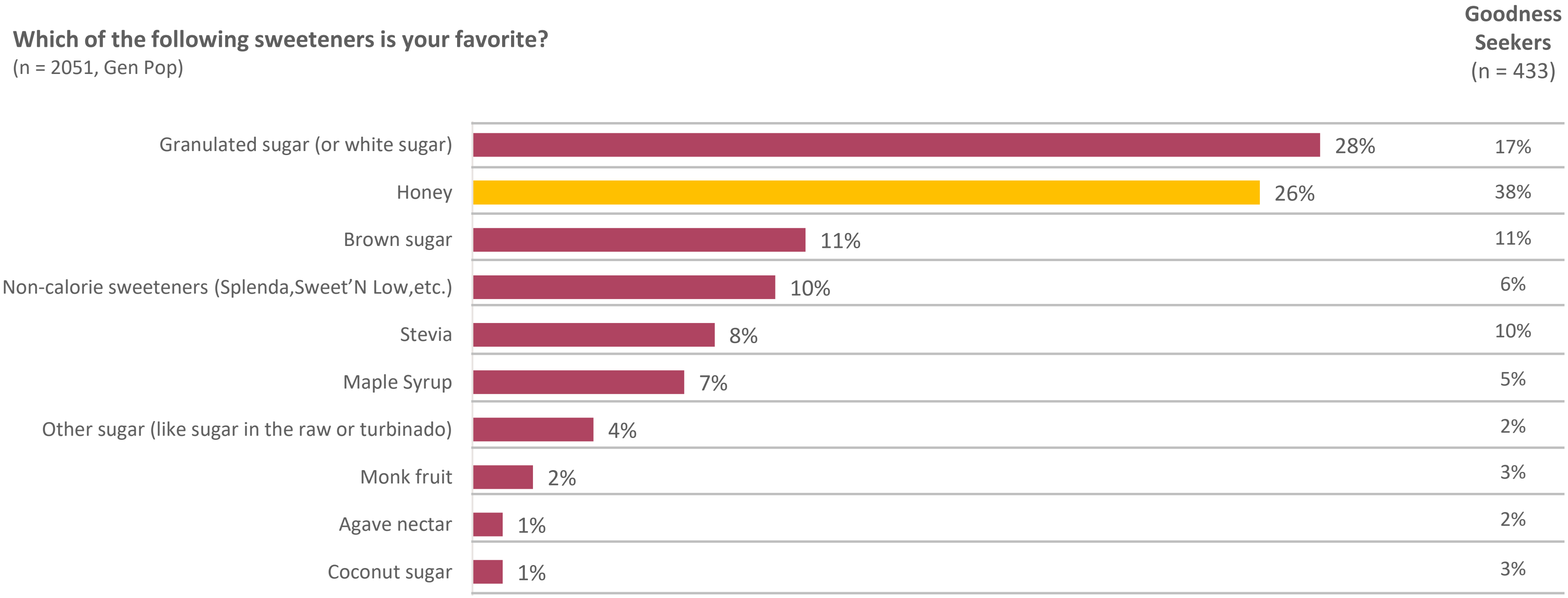
	2018 Gen Pop (n = 2,003)	2019 Gen Pop (n = 1,568)	2020 Gen Pop (n=2000)	2021 Gen Pop (n=2000)	2022 Gen Pop (n=1663)	2022 vs 2021	2021 Goodness Seeker (n=429)	2022 Goodness Seeker (n=405)	2022 vs 2021
Used at breakfast	47%	52%	49%	55%	56%	1	59%	64%	5
Used in baked goods	39%	43%	41%	47%	45%	-2	57%	46%	-11
Used in beverages like tea, coffee, or smoothies	49%	56%	51%	51%	53%	2	49%	50%	1
Used in alcoholic beverages or mixed drinks	6%	5%	6%	9%	7%	-2	15%	15%	0
Used with snacks	28%	29%	29%	37%	35%	-2	49%	51%	2
Used at dinner	15%	14%	14%	19%	17%	-2	28%	24%	-4
Used at lunch	14%	13%	16%	21%	17%	-4	27%	25%	-2
Used for medical purposes	20%	15%	17%	20%	20%	0	30%	27%	-3
Used in a recipe	47%	50%	48%	46%	47%	1	48%	39%	-9
Used in beauty care			7%	10%	9%	-1	19%	16%	-3
Other	5%	2%	2%	2%	2%	0	2%	0%	-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, where as Honey is preferred among Goodness Seekers

Honey is the second most preferred sweetener with the general population and the most preferred sweetener for Goodness Seekers by far. This hasn't changed from last year and remains consistent.

Which of the following sweeteners is your favorite?
(n = 2051, Gen Pop)



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

SWEETENER PREFERENCE (2018-2022): Honey gained slightly among Gen Pop and with Goodness Seekers.

Honey is closing the gap on sugar among the Gen Pop, getting closer to 2020 levels.

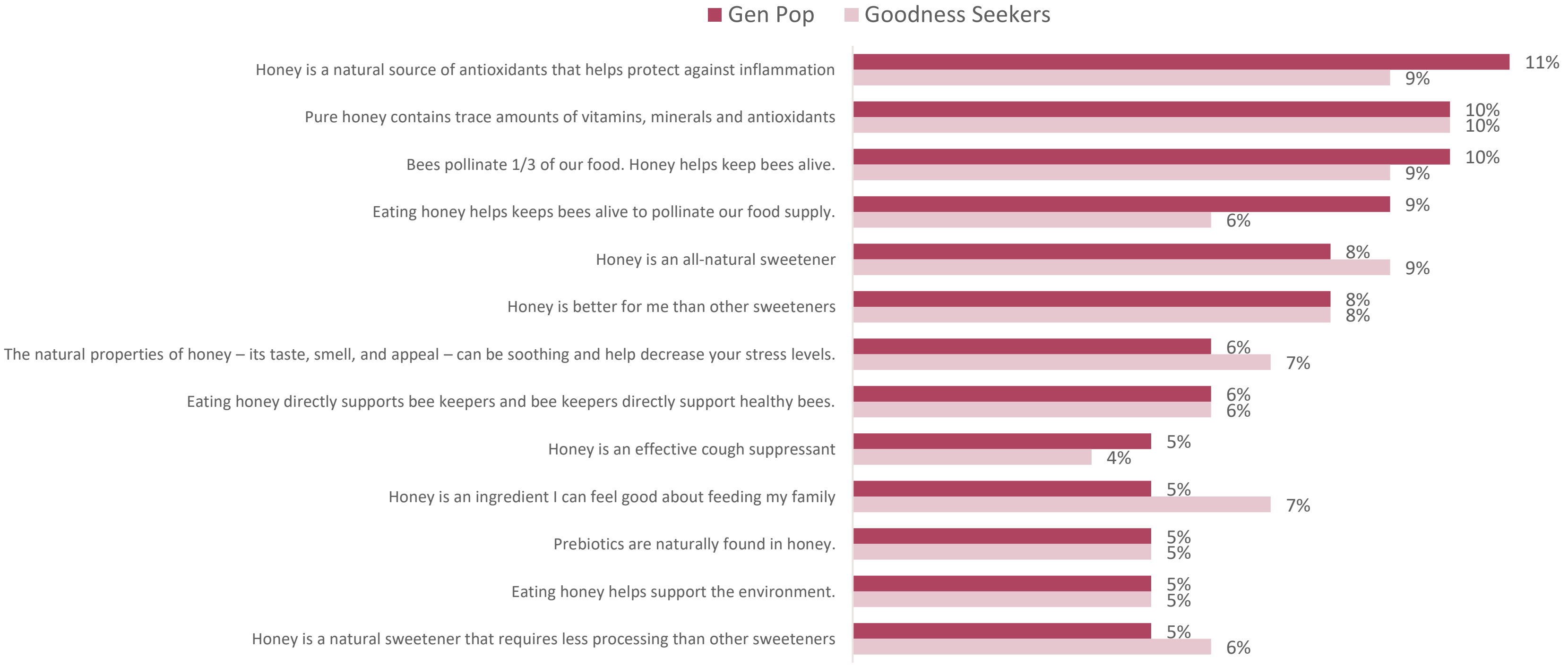
	2018 Gen Pop (n = 2,003)	2019 Gen Pop (n = 2,001)	2020 Gen Pop (n=2,000)	2021 Gen Pop (n=2,000)	2022 Gen Pop (n=2051)	2022 vs 2021	2020 Goodness Seeker	2021 Goodness Seeker	Goodness Seeker 2022 vs 2021
Honey	24%	27%	26%	24%	26%	2	33%	38%	5
Granulated sugar (or white sugar)	28%	28%	23%	30%	28%	-2	13%	17%	4
Non-calorie sweeteners (like Splenda)	18%	18%	9%	11%	10%	-1	9%	6%	-3
Maple syrup	12%	12%	9%	8%	7%	-1	8%	5%	-3
Brown sugar	9%	8%	11%	9%	11%	2	9%	11%	2
Other sugar (like Sugar In The Raw or turbinado)	3%	4%	4%	4%	4%	0	4%	2%	-2
Agave nectar	2%	2%	3%	2%	1%	-1	5%	2%	-3

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

MOTIVATING STATEMENTS: Motivating messages are focused on antioxidants and nutrients, followed by bee health.

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

Sorted by Medium Honey Users

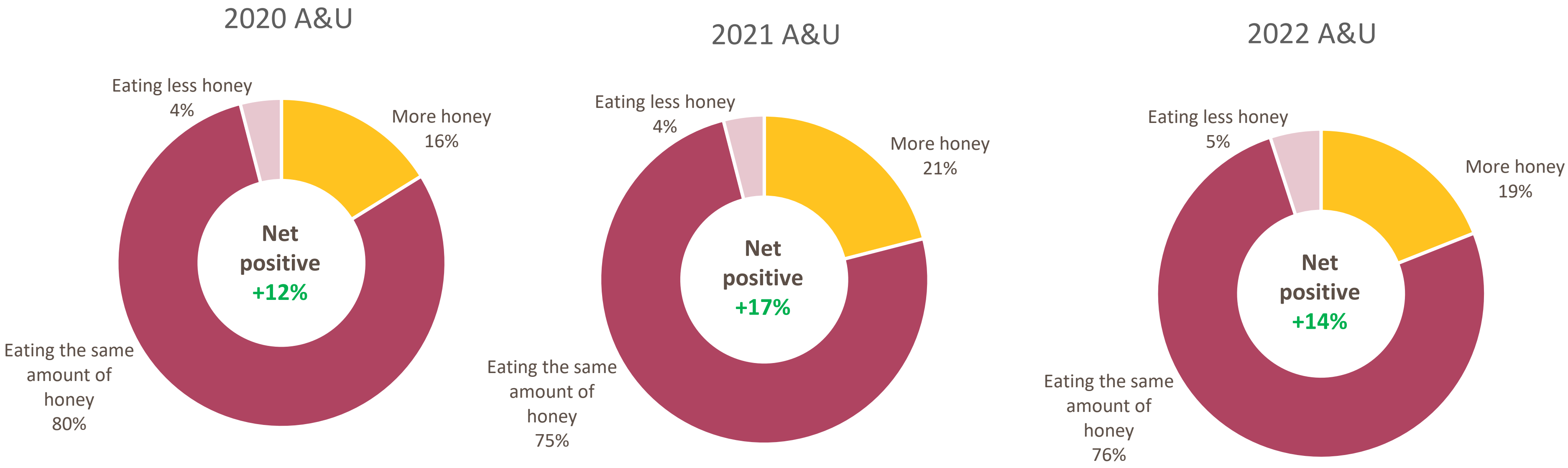


 Q31. Now which of the following is the most effective in motivating you to eat honey more often?

GP HONEY CONSUMPTION: Future planned honey consumption decreased by 2 pts, but still remains a net positive

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

Anticipated change in honey consumption over next year



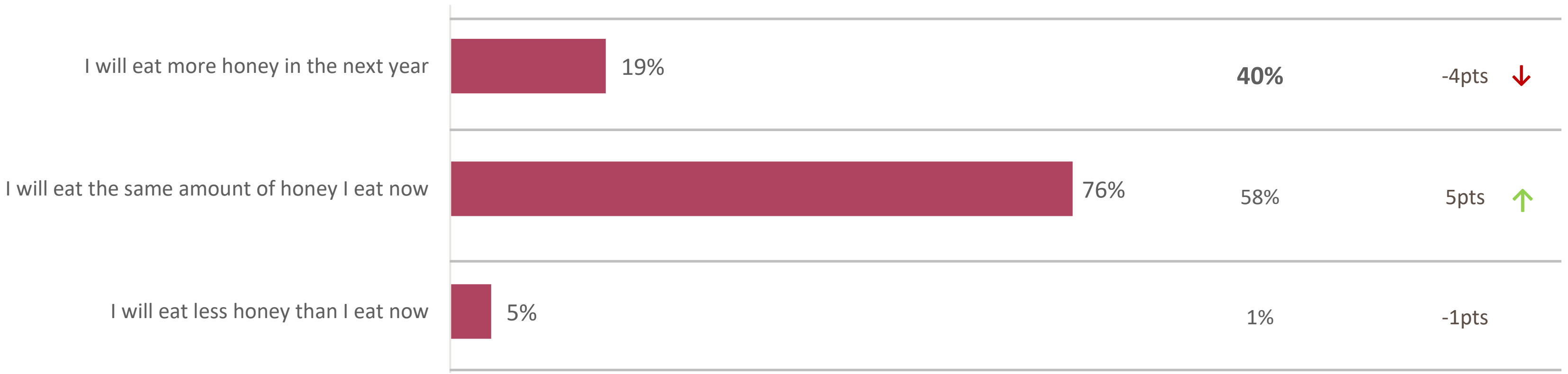
Q24A. Do you plan to eat honey in the next year?

HONEY CONSUMPTION: Goodness Seekers expect to eat the same amount of honey next year

This rose 5pts this year, and brought down the amount looking to increase consumption by 4pts.

Perceived Changes in Honey Consumption
(n = 2,051, Gen Pop)

Goodness Seekers
(n = 433)

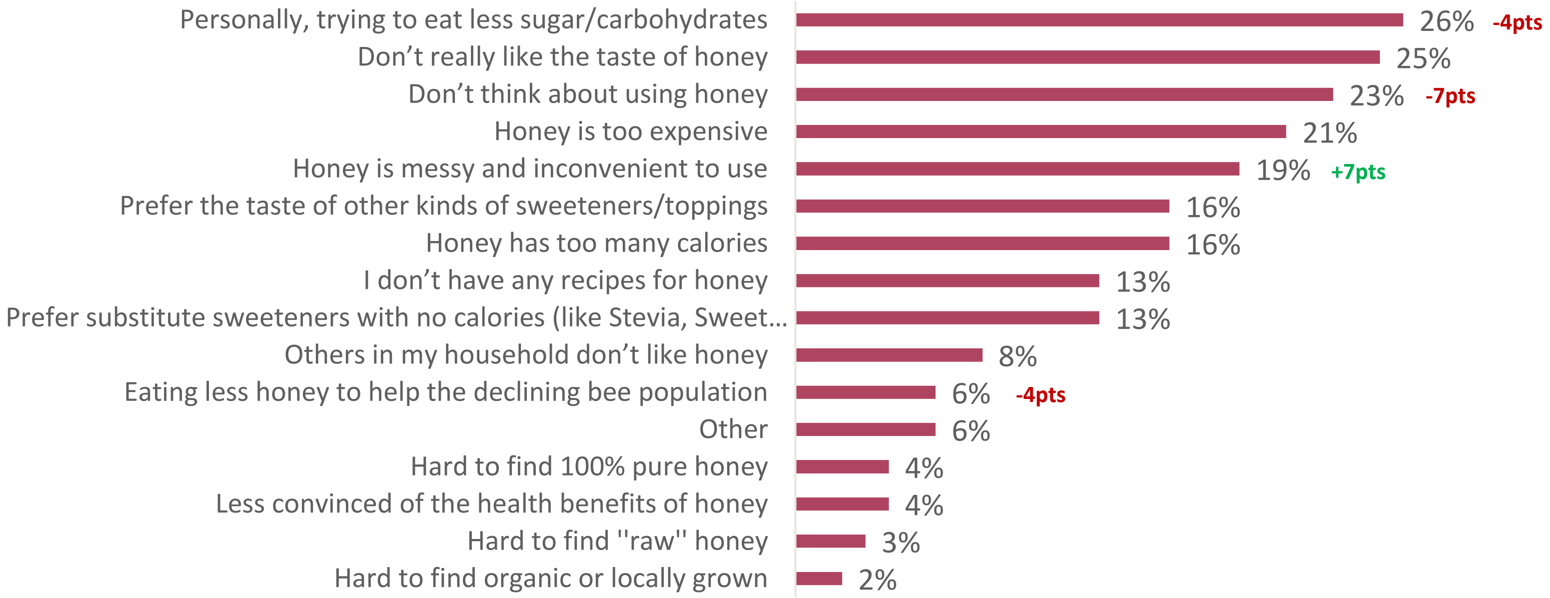


 Q24A. How if at all, do you expect your honey consumption to change in the next year?

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

Honey is messy and inconvenient as a barrier rose significantly from last year.

Barriers to More Frequent Consumption ("Eat Less Honey") - Nets
Aided, Select all that apply
(n = 103)



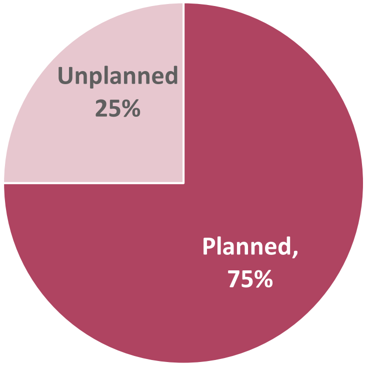
Q24C. Which of the following are reasons you will eat less honey than you eat now in the next year?

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.

Planned Purchase
(n = 1,550, Gen Pop)



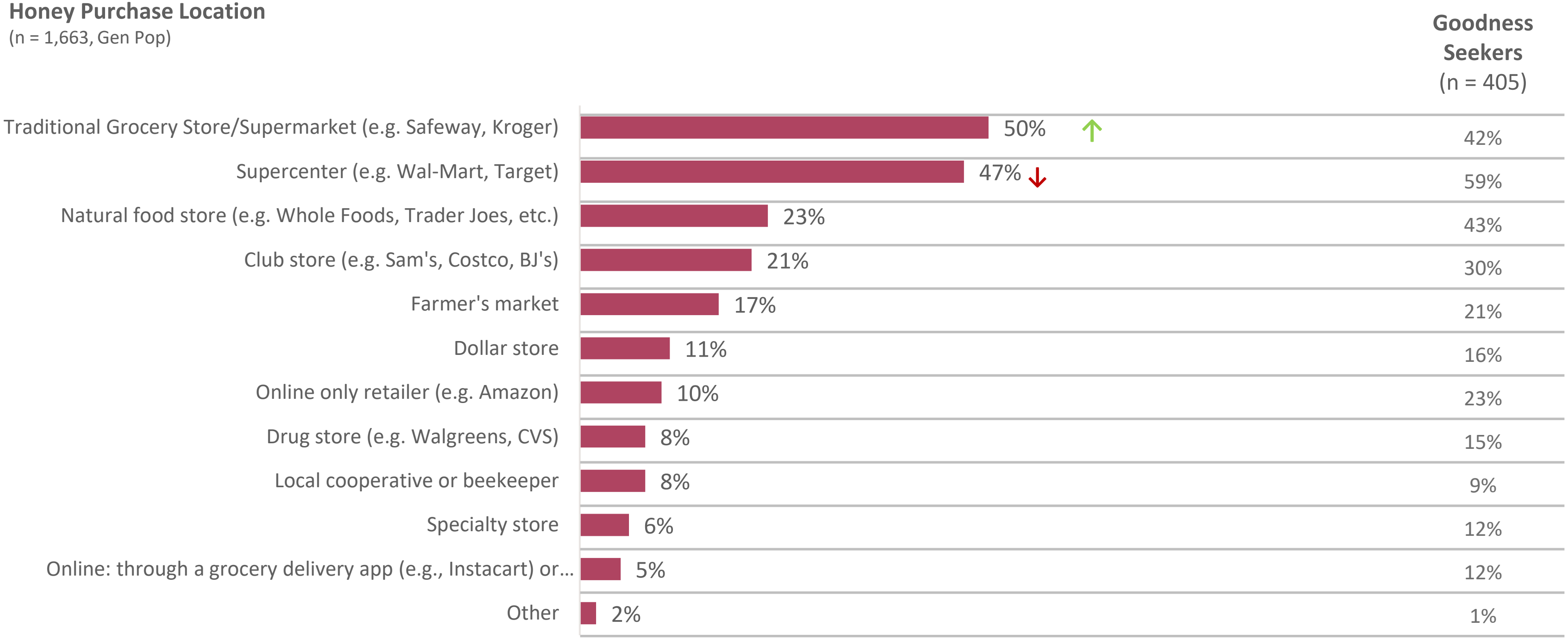
Reason for Purchase (n = 2051 Gen Pop)		Chg Vs. 2021	Goodness Seekers (n = 433)	Goodness Seekers 2022 vs 2021
Restocking: I was out of honey and needed to replace it	53%	3	44%	3pts
Recipe: I had a specific use in mind and needed to purchase honey for it	23%	0	22%	-2pts
Promotion: I noticed an attractive price or display on honey and decided to buy some	11%	-2	14%	1pt
New variety/something interesting: I saw a new type of honey or something different that interested me	12%	-2	20%	-2pts

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: Traditional grocery stores and supermarkets are now the leading retail locations.

Traditional grocery stores rebounded this year while many others stayed the same or fell, allowing for them to regain the lead from supercenters.

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 (2017-2022): Traditional Grocery Stores Come Back

Many retailers where consumers shop and buy honey decreased this wave for both the gen pop and goodness seekers. Traditional grocery stores being the only channel to see a gain within both targets.

	2018 Gen Pop (n = 2,003)	2019 Gen Pop (n = 1,568)	2020 Gen Pop (n=1602)	2021 Gen Pop (n=1663)	2022 Gen Po (n=1663)	2022 vs 2021	2021 Goodness Seekers (n=429)	2022 Goodness Seekers (n=433)	2022 vs 2021
Supercenter (e.g. Wal-Mart, Target)	48%	41%	41%	52%	47%	-5	58%	59%	1
Traditional Grocery Store/Supermarket (e.g. Safeway, Kroger)	51%	59%	56%	47%	50%	3	41%	42%	1
Natural food store (e.g. Whole Foods, Trader Joes, etc.)	21%	21%	19%	24%	23%	-1	41%	43%	2
Farmer's market	12%	20%	18%	18%	17%	-1	23%	21%	-2
Club store (e.g. Sam's, Costco, BJ's)	19%	13%	17%	22%	21%	-1	33%	30%	-3
Dollar store	9%	7%	8%	16%	11%	-5	23%	16%	-7
Local cooperative or beekeeper	6%	8%	8%	8%	8%	0	13%	9%	-4
Online only retailer (e.g. Amazon)	-	-	-	-	10%	New	-	23%	New
Online: through a grocery delivery app	-	-	-	-	5%	New	-	12%	New
Online	3%	4%	7%	10%	-	-	18%	-	-
Drug store (e.g. Walgreens, CVS)	7%	4%	7%	10%	8%	-2	20%	15%	-5
Specialty store	4%	4%	6%	6%	6%	0	10%	12%	2
Other	2%	1%	1%	2%	2%	0	1%	1%	0

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

IN STORE: Most look for honey within the spreads aisle

Half of consumers look for honey in the aisle with spreads & toppings, the remaining are looking in multiple sections of the store.

Where in store is honey purchased?
(n = 830, Buys Honey)

	(n = 830, Buys Honey)	**Goodness Seekers** (n = 172)
Near peanut butter, jelly, or other spreads	50% ↑	35%
Near the sugar, flour, or other baking ingredients	19% ↓	22%
In the store's natural/organic section	12%	24% ↑
Near oatmeal, cereal, syrup or other breakfast items	7%	9% ↓
In the deli section	2%	6%
Don't know / can't remember	9%	4%

 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 claim benefits driving Goodness Seekers. While Gen Pop didn't see much change from previous years, the Goodness Seekers saw factors like "labeled as local" and "honey type/form" increase and container size decrease.

Honey Decision Criteria (n = 511, Honey Gen Pop)	2020 Gen Pop	2021 Gen Pop	2022 Gen Pop	2022 vs 2021	2021 Goodness Seekers	2022 Goodness Seekers	2022 vs 2021
PRICE	42%	45%	43%	-2 pts	35%	36%	1 pt
A BRAND I KNOW AND TRUST	30%	25%	25%	0 pts	29%	30%	1 pt
CLAIM BENEFITS							
Labeled as Local	18%	16%	16%	0 pts	14%	18%	4 pts
Labeled as Organic	16%	12%	15%	3 pts	21%	22%	1 pt
Labeled as Pure, Unfiltered, or Raw	23%	22%	22%	0 pts	29%	31%	2 pts
TYPE OF HONEY							
Type or Form (liquid, whipped, comb)	22%	25%	24%	-2 pts	22%	28%	6 pts
Varietal (Manuka, clover, wildflower)	8%	9%	8%	-1 pts	12%	11%	-1 pts
Country of origin	11%	9%	9%	0 pts	15%	14%	-1 pts
Flavored (vanilla, cinnamon)	4%	8%	6%	-2 pts	14%	11%	-3 pts
Color or Clarity of Honey	9%	17%	18%	1 pt	22%	23%	1 pts
PACKAGING/FORM							
Container Size	36%	31%	30%	-1 pts	26%	22%	-4 pts
Container Type (glass, plastic)	12%	14%	12%	-2 pts	16%	13%	-3 pts
True Source Certified	4%	9%	9%	0 pts	18%	18%	0 pts

Q20BNEW. 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:

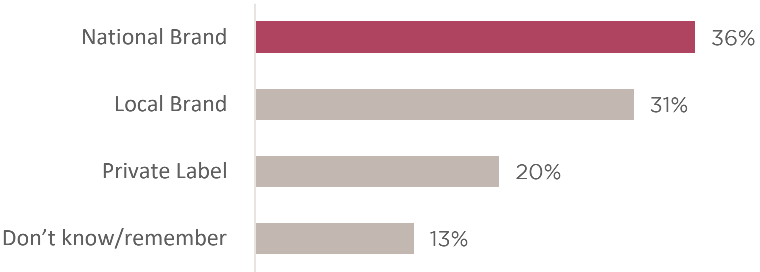
Most consumers bought a national brand of liquid honey for their last purchase. Raw, unfiltered, and 100% pure once again ranked as the top benefit consumers prefer.

FORM

90% purchased liquid honey

10% purchased a spread, whipped, or honeycomb

BRAND



KEY BENEFITS

46%

43%

35%

17% ↑ none of these

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

LAST HONEY PURCHASE:

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

CONTAINER SIZE

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

76% small/medium honey (under 24 oz)

CONTAINER TYPE

36% glass bottle or jar (36% PY)

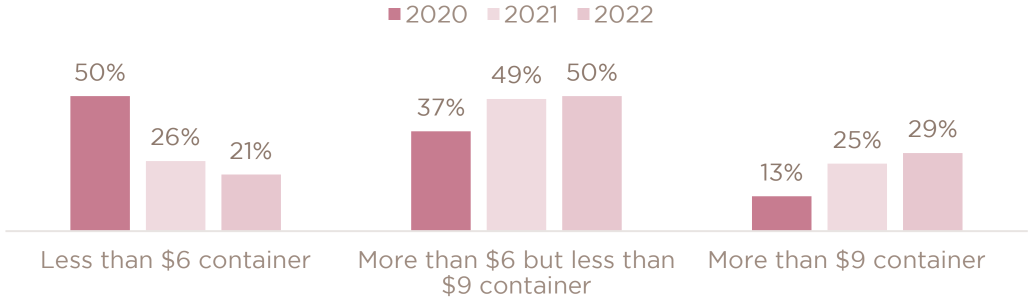
63% plastic bottle or squeeze bottle (63% PY)

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

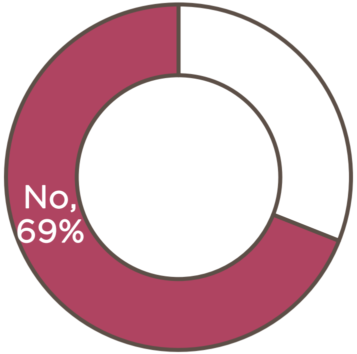
LAST HONEY PURCHASE:

We see honey purchases continuing to skew more expensive as the trend continues from last year to this year. In turn, honey is being bought less on sale

PRICE PAID



ON SALE, PROMOTION OR DISCOUNTED



31% ↓

Bought honey on sale

↑ ↓

VALUE PERCEPTION (2018-2022): Goodness Seekers are willing to pay more for a product with honey, while the Gen Pop is less influenced to pay more.

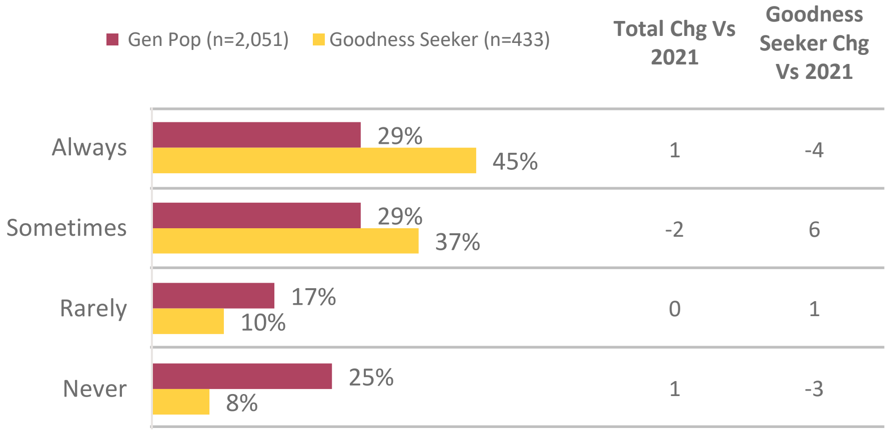
	2018 Gen Pop (n = 2,003)	2019 Gen Pop (n = 2,001)	2020 Gen Pop (n=2000)	2021 Gen Pop (n=2000)	2022 Gen Pop (n=2051	2022 vs 2021	2021 Goodness Seekers (n=429)	2022 Goodness Seekers (n=433)	2022 vs 2021
I will buy the product with honey, regardless of price	17%	4%	6%	10%	11%	1	24%	25%	1
I will buy the product with honey, even if I have to pay a little more for it	24%	14%	16%	17%	16%	-1	28%	29%	1
It does not influence my decision	32%	45%	39%	36%	40%	4 ↑	22%	20%	-2
I will buy the product with honey, but **only if it does not cost more**	22%	27%	27%	25%	24%	-1	16%	20%	4 ↑
I prefer the product that **does not have honey**	6%	10%	12%	12%	9%	-3 ↓	10%	6%	-4 ↓

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?

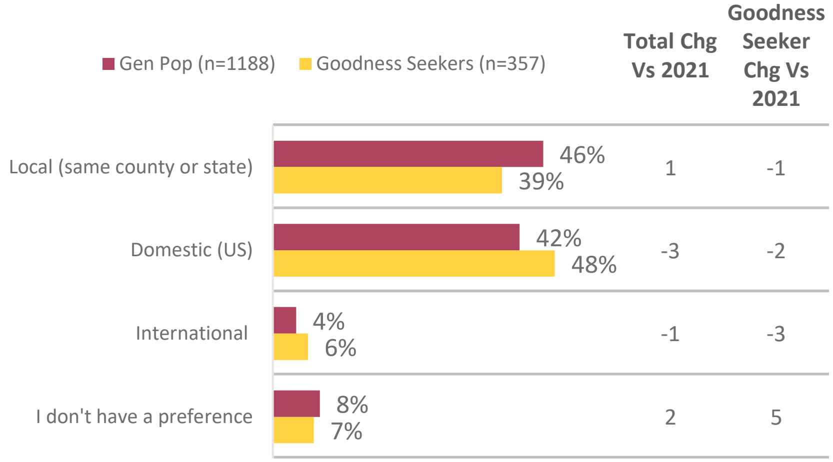
COUNTRY OF ORIGIN: Consumer's check for country of origin on jar

Nearly 30% of the General Population say they always look for the country of origin when purchasing honey. A greater number (50%) of Goodness Seekers say they always check. The majority also 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. All other spots either stayed relatively similar to last year or decreased in frequency.

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

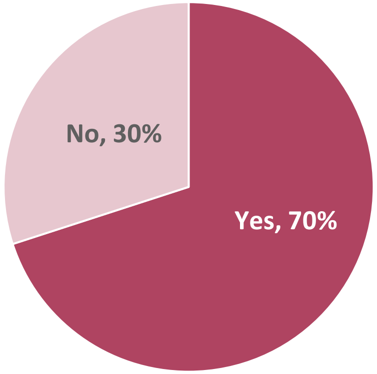
Goodness Seeker (n = 402)	
In a pantry or cabinet	74% ↓
Out on a counter (visible for everyday use)	28%
In the refrigerator	15% ↑
Out on a table (visible for everyday use)	16% ↓
In a drawer	11%

Sustainability Concerns

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

Seven in ten consumers are aware that the bee population is declining, however that number remains lower than 2020 numbers. Awareness among Goodness Seekers is lower than gen pop for the first time since we've tracked this.

Are you aware of the declining honey bee population?
(n = 2,051, Gen Pop)



Goodness Seekers (n=433):
Yes: 67% , No: 33%

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

Awareness of Declining Honey Bee Pop	2018	2019	2020	2021	2022	2022 vs 2021
Yes						
Gen Pop (n = 2,000)	73%	76%	72%	69%	70%	1
Goodness Seekers (n=433)	-	-	79%	72%	67%	-5 ↓
No						
Gen Pop (n = 2,000)	27%	24%	28%	31%	30%	-1
Goodness Seekers (n=433)	-	-	21%	28%	33%	5 ↑

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

BEE HEALTH PERCEPTIONS (2018-2022): Perceptions of bee health linked to honey consumption saw drops among Goodness Seekers

Roughly half of consumers believe that honey consumption is very/somewhat good for the bees (48%), 1/4 don't know. The Goodness Seeker is more knowledgeable on the benefit of honey usage for bees, but that decreased significantly this year from the "very good" category.

	2018 Gen Pop (n = 1,246)	2019 Gen Pop (n = 2,001)	2020 Gen Pop (n=2000)	2021 Gen Pop (n=2000)	2022 Gen Pop (n=2051)	2022 vs 2021	2021 Goodness Seekers (n=429)	2022 Goodness Seekers (n=433)	2022 vs 2021
Very good for honey bees	35%	21%	23%	25%	25%	0	43%	35%	-8 ↓
Somewhat good for honey bees	23%	23%	24%	23%	23%	0	21%	25%	4 ↑
Not good or bad for honey bees	15%	17%	18%	18%	18%	0	10%	12%	2
Somewhat bad for honey bees	7%	6%	5%	7%	7%	0	7%	9%	2
Very bad for honey bees	2%	3%	2%	3%	2%	-1	3%	4%	1
Don't know/not sure	19%	30%	27%	24%	25%	1	16%	15%	-1

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

SUSTAINABILITY CONCERNS (2018-2022): Food safety continues to be a top sustainability concern.

Just behind food safety, farming chemicals became more concerning to consumers. None of the other factors changed significantly with the Gen Pop.

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)	2022 Gen Pop (n=2051)	2022 vs 2021
Food safety	46%	43%	40%	37%	38%	1
Farming chemicals, pesticides, or chemical residue	41%	39%	35%	33%	36%	3
Bees (i.e., honey bee health, pollination, etc.)	41%	40%	35%	34%	34%	0
Food or beverages being over-processed	-	32%	29%	29%	30%	1
Packaging that is recyclable or environmentally friendly	27%	25%	22%	23%	25%	2
Natural foods containing added ingredients or natural foods being adulterated	28%	25%	25%	23%	24%	1
Carbon footprint	23%	22%	21%	22%	24%	2
GMOs	27%	21%	22%	20%	22%	2
Local sourcing/farming (i.e., how far does this food travel)	24%	19%	21%	21%	21%	0
Organic or made with organic ingredients	22%	16%	18%	19%	19%	0
Social responsibility (i.e., a percentage of proceeds donated to a cause)	21%	15%	18%	18%	18%	0

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?

SUSTAINABILITY CONCERNS (2020-2022): Goodness Seekers go from small to large declines in concern from 2020-2022.

While a small to moderate drop was seen from 2020 to 2021, the change from 2021 to 2022 was even more drastic with all subjects seeing a drop of 10pts or more in the amount respondents said they were "very concerned".

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

	2020 Goodness Seekers (350)	2021 Goodness Seekers (n=429)	2022 Goodness Seekers (n=433)	2022 vs 2021
Food safety	68%	60%	41%	-19 pts↓
Farming chemicals, pesticides, or chemical residue	59%	59%	44%	-15 pts↓
Bees (i.e., honey bee health, pollination, etc.)	64%	52%	39%	-13 pts↓
Food or beverages being over-processed	57%	57%	42%	-15 pts↓
Packaging that is recyclable or environmentally friendly	50%	48%	36%	-12 pts↓
Natural foods containing added ingredients or natural foods being adulterated	47%	55%	36%	-19 pts↓
Carbon footprint	49%	46%	34%	-12 pts↓
GMOs	45%	46%	31%	-15 pts↓
Local sourcing/farming (i.e., how far does this food travel)	47%	46%	32%	-14 pts↓
Organic or made with organic ingredients	43%	44%	34%	-10 pts↓
Social responsibility (i.e., a percentage of proceeds donated to a cause)	61%	40%	30%	-10 pts↓

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

HONEY ADULTERATION CONCERNS (2017-2022): Total sample is unchanged, but goodness seekers are less worried

While the change YoY for the total sample hasn't shifted much, we saw a distinct shift from "very" to "somewhat" concern for the goodness seekers.

	2018 Gen Pop (n = 1,450)	2019 Gen Pop (n = 1,354)	2020 Gen Pop (n=1329)	2021 Gen Pop (n=1291)	2022 Gen Pop (n=1327)	2022 vs 2021	2021 Goodness Seeker (n=368)	2022 Goodness Seeker (n=359)	2022 vs 2021
I am very concerned about natural foods being adulterated as it relates to honey	35%	31%	30%	33%	33%	0pts	55%	39%	-16 pts
I am somewhat concerned about natural foods being adulterated as it relates to honey	47%	45%	45%	46%	46%	0 pts	33%	47%	14 pts
I have heard about natural foods being adulterated but am not very concerned as it relates to honey	14%	15%	17%	14%	15%	1 pt	8%	11%	3 pts
I am not concerned at all about natural foods being adulterated or feel it does not relate to honey	5%	9%	8%	7%	6%	-1 pts	6%	3%	-3 pts

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

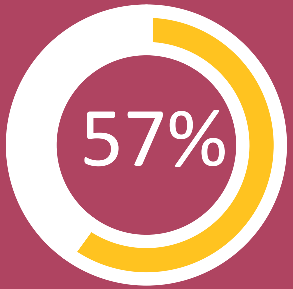
#2

Honey is America's second favorite sweetener at 26%, up 2 pts vs year ago

78%

(top 2 box)

Perceptions of honey remain strong, with 78% saying its something everyone would enjoy, positive shift in broad appeal and health halo



Report using honey multiple times a month or more; with 28% being heavy users, down 1 pt

11%

Recall a positive story about honey, down from 14% YA

#1

Morning continues to be the number one daypart for Honey at 56%, up 1 pt vs YA

48%

Believe honey consumption is good for the bees (No change vs YA)

Goodness Seeker – KPI's

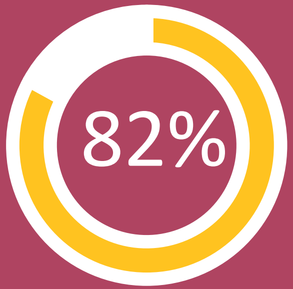
#1

Honey is the favorite sweetener among Goodness Seeker at 38% (+5 pts), beating sugar by 21%

90%

(top 2 box)

Perceptions of honey remain strong, 90% something everyone would enjoy, positive shift in broad appeal and convenience



Report using honey multiple times a month or more; with 56% being heavy users, up 2 pts

29%

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

#1

Morning is the number one daypart for Honey, 65% use it with breakfast (5 pts vs YA)

60%

Believe honey consumption is good for the bees (-4 pts vs. YA)

Metrics Dashboard

Awareness, Preference, and Usage	General Population					
	2018	2019	2020	2021	2022	2022 vs 2021
Honey Awareness (Unaided)						
Gen Pop (n = 2051)	22%	36%	31%	29%	30%	1 pts
Goodness Seeker (n = 433)			35%	29%	29%	0 pts
Honey Usage - % Using Honey Several Times/Month or More						
Gen Pop (n = 2051)	53%	49%	54%	60%	57%	-3 pts
Goodness Seeker (n = 433)			72%	83%	82%	-1 pts
% Selecting Honey as Favorite Sweetener						
Gen Pop (n = 2051)	24%	27%	26%	24%	26%	2 pts
Goodness Seeker (n = 433)			31%	33%	38%	5 pts
Honey Positive Story Recall						
Gen Pop (n = 2051)	12%	6%	8%	14%	11%	-3 pts
Goodness Seeker (n = 433)			18%	31%	29%	-2 pts

Metrics Dashboard

	General Population					
Sustainability	2018	2019	2020	2021	2022	2022 vs 2021
Aware of the Declining Honey Bee Population						
Gen Pop (n = 2051)	73%	76%	72%	69%	70%	1 pts
Goodness Seeker (n=433)			79%	72%	67%	-5 pts ↓
Very Concerned with Honey Bee Health (overall)						
Gen Pop (n = 2051)	41%	40%	35%	34%	35%	1 pt
Goodness Seeker (n=433)			59%	52%	53%	1 pt
% Saying Honey is Very/Somewhat Good for Honey Bees						
Gen Pop (n = 2051)	57%	44%	47%	48%	48%	0 pts
Goodness Seeker (n=433)			59%	64%	60%	-5 pts ↓
Honey Shopping	2018	2019	2020	2021	2022	2022 vs 2021
% Will Buy the Honey Product Even if have to pay more for it or regardless of price						
Gen Pop (n = 2051)	41%	18%	22%	27%	25%	-2 pts
Goodness Seeker (n=433)			43%	52%	50%	-2 pts
Adulteration/Purity	2018	2019	2020	2021	2022	2022 vs 2021
% Very Concerned about “Natural foods containing added ingredients or natural foods being adulterated” regarding honey						
Gen Pop (n = 2051)	35%	31%	30%	33%	33%	0 pts
Goodness Seeker (n=433)			49%	55%	39%	-16 pts ↓

Appendix – Barriers & Substitutes

BARRIERS TO MORE FREQUENT HONEY USAGE: “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. Gen Pop is also very more price conscious

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

Aided, Select all that apply

(n = 2051)

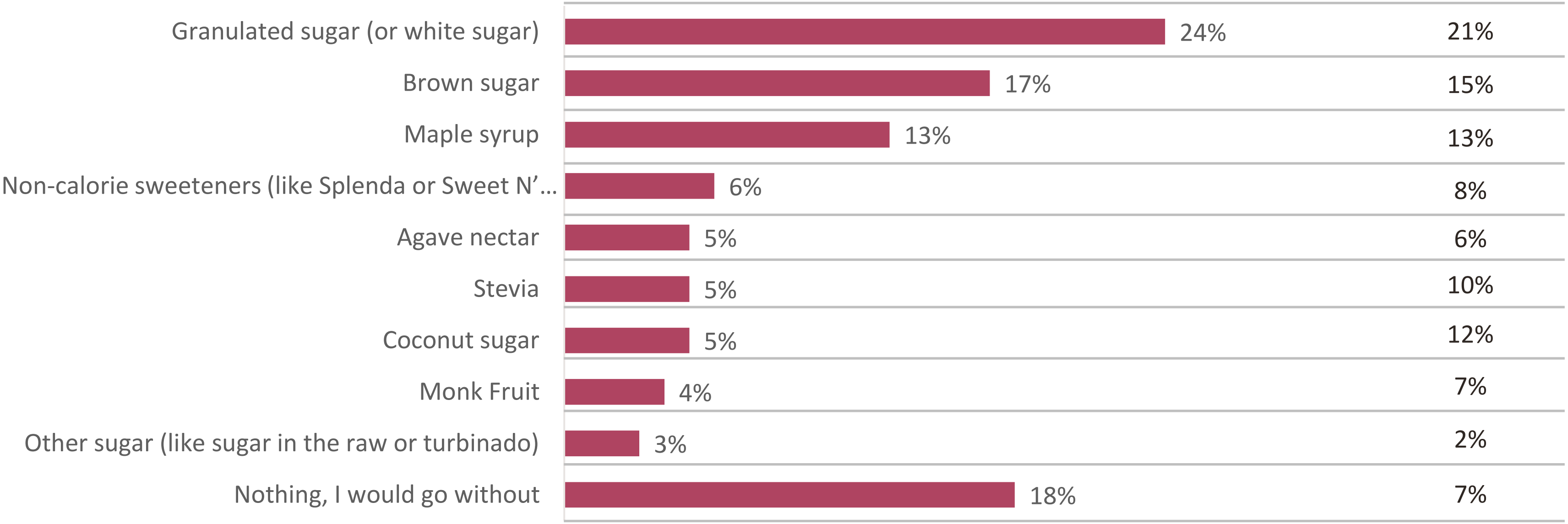
		Goodness Seekers (n = 433)
Don’t really think about using honey	19%	7%
Honey is too expensive	16%	12%
Personally, trying to eat less sugar	16%	13%
I already eat enough honey / it would be hard for me to eat more…	12%	12%
Honey is too sweet	10%	7%
Honey is messy and inconvenient to use	10%	5%
Honey is too high in calories	9%	11%
I prefer other sweeteners	8%	5%
I don't have any recipes for honey	8%	6%
Don’t really like the taste of honey	6%	2%
It’s hard to find 100% pure honey in the store	5%	8%
Prefer substitute sweeteners with no calories (like Stevia, Sweet N…	4%	3%
Hard to find "raw" honey	3%	4%
Others in my household don’t like honey	3%	3%
Hard to find organic or locally grown	2%	3%
I expect to restrict my trips to the grocery store	2%	1%
Less convinced of the health benefits of honey	1%	1%
Consuming honey is bad for the bees	1%	2%
Other	5%	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 = 533, Gen Pop)

Goodness Seekers
(n = 165)



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