

Manuka Honey Project Summary findings April 2016



Methodology



Research aims

To understand the consumer perception of Manuka honey in terms of:

Awareness of manuka honey

Understanding of the labelling

Opinions towards the health benefits

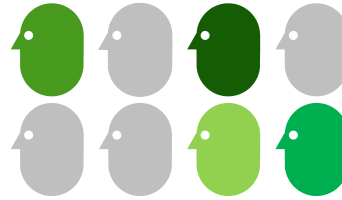
Associations between grading systems and health claims



Method

Online, self-completion interviews conducted via the TNS Online Omnibus (CAWI)

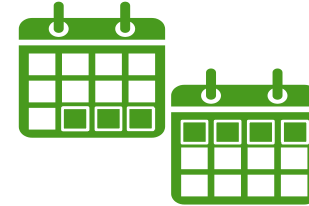
5 minute survey on knowledge about awareness of manuka honey, its labelling and the perceived associated health properties



Sample

Adults in England, Scotland, Wales and Northern Ireland, aged 16+

Quotas by age and gender and region used to ensure sample nationally representative of the UK population



Fieldwork dates

15th - 22nd March 2016



Weighting

Data has been weighted to be nationally representative of the UK population

Only weighted data shown

1

Awareness



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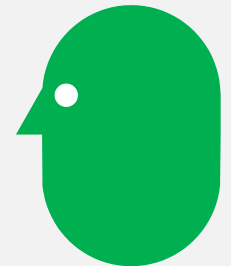


Awareness of manuka honey

- Respondents selected types of honey that they had heard of from a list of varieties of honey (Q002)
- After questions on purchasing behaviours, all respondents were then provided with the further information about manuka honey shown below and awareness was checked amongst those not previously aware (Q008)

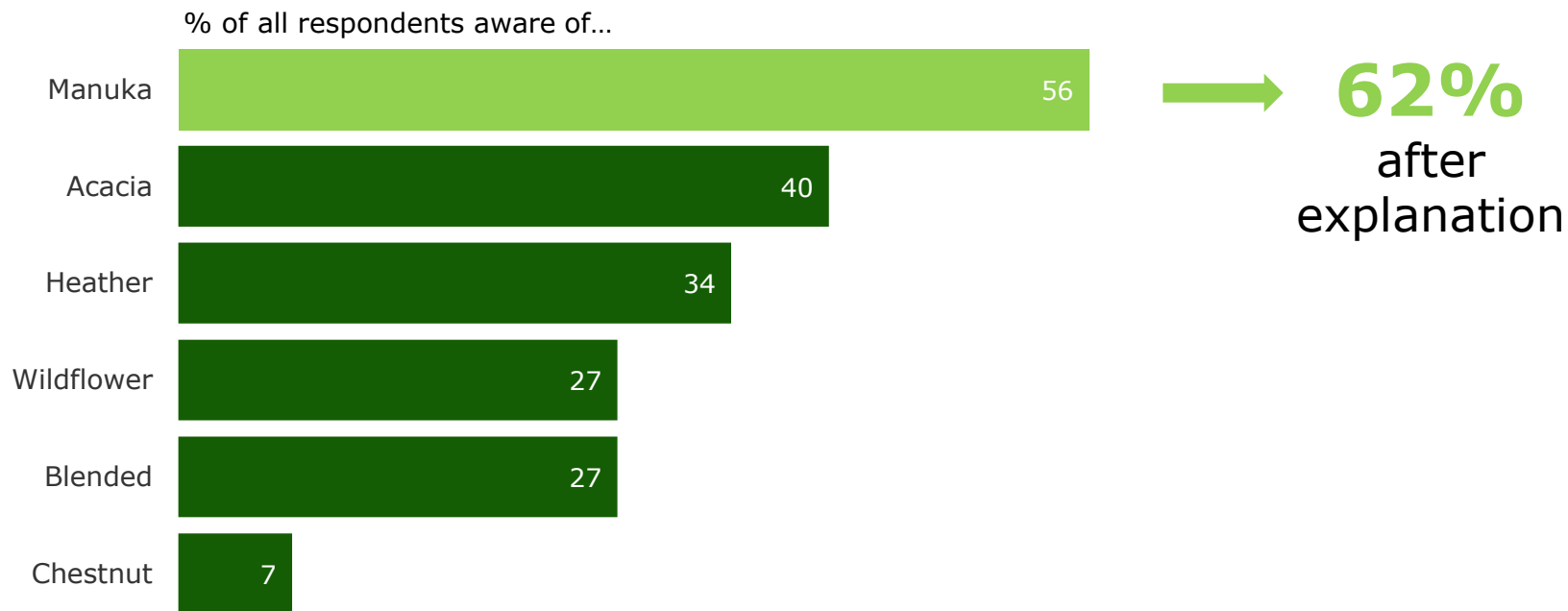
Manuka honey is a honey sourced mainly from New Zealand or Australia. Honey can be produced by bees using the nectar of lots of different flowers. Manuka honey differs from other honey as it is made only from the nectar of the manuka tree (*Leptospermum scoparium*).

In the UK manuka honey is commonly available to buy online or on the high street.



Source: Q007. Definition of manuka honey

More than half of respondents had heard of manuka honey and this increased to 3 in 5 after further information was provided



Women were more likely than men to have heard of manuka honey, with seven in ten (71%) aware after further information was provided compared with 54% of men.

Source: Q002. Have you ever heard of any of these types of honey? Base: All respondents (2525)
Q008 (rebased). Is this the first time you've come across manuka honey? Base: All respondents (2525)

2

Perceived health benefits



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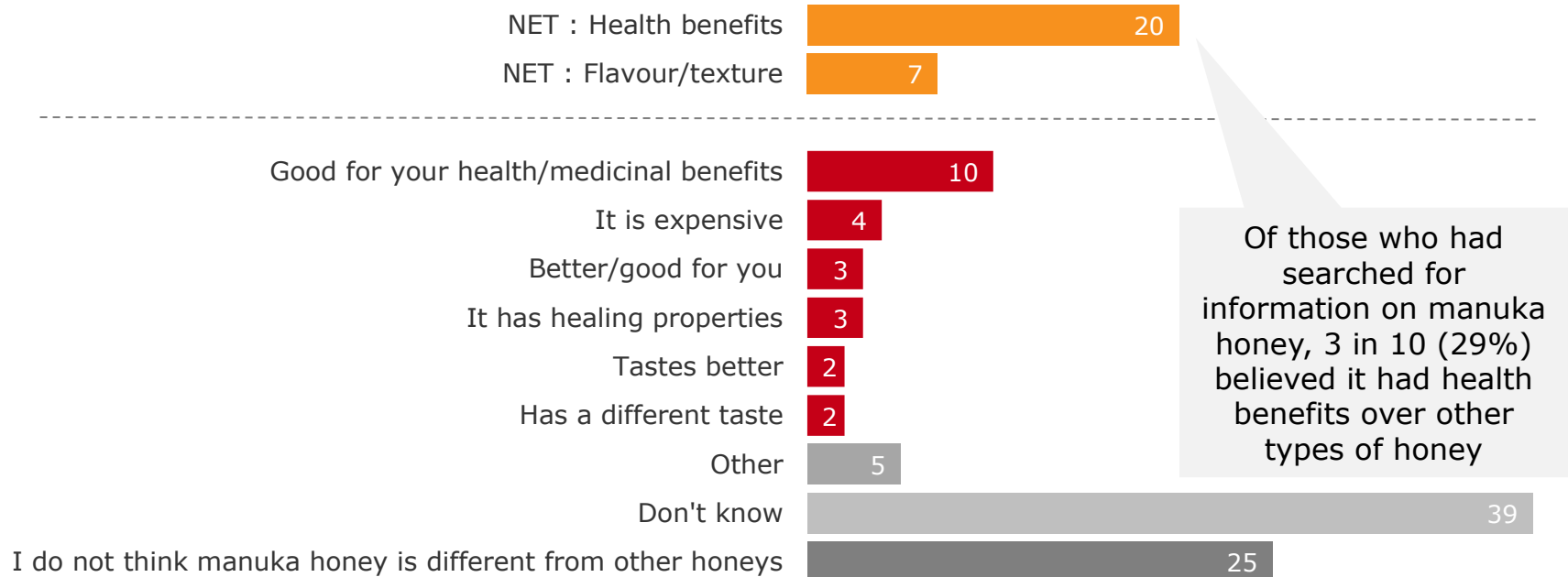
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One in five of those aware of manuka spontaneously mentioned that they thought that it offered health benefits that differ from other types of honey

% of those aware of manuka honey mentioning...



Almost two thirds (64%) of those aware of manuka honey either did not think or did not know if manuka was different from other honey

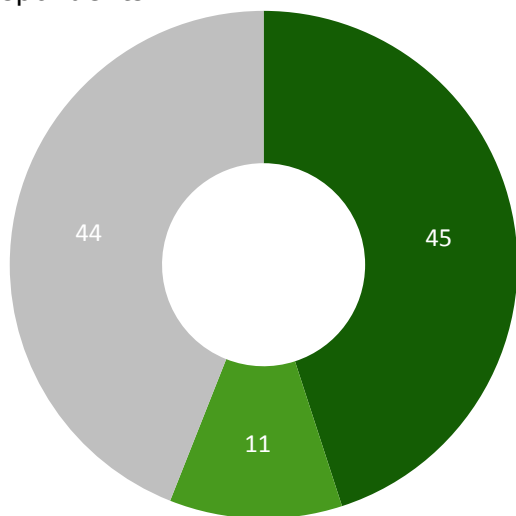
Source: Q004.Do you think manuka honey when eaten as a food is different from other types of honey? If yes, how?

Base: Those aware of manuka honey (1462)

*Showing all responses 2% or greater

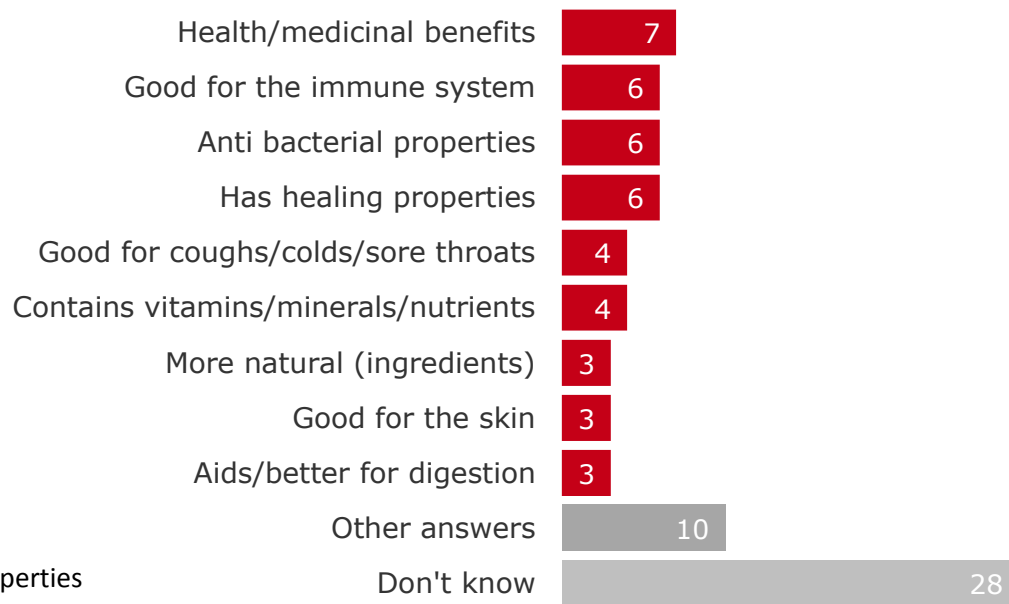
When prompted, equal numbers thought manuka honey had health properties or didn't know. Only a tenth said manuka did not have health properties.

% all respondents



- Manuka honey has additional health properties
- Manuka honey does not have any additional health properties
- Don't know

% those who think manuka honey has health properties



Amongst those who thought there were health properties, there was no consensus about what these may be.

Source: Q012. Thinking about manuka honey compared with other types of honey, which statement comes closest to your own opinion? Q013. What health properties do you believe manuka honey has over other types of honey? Base: All respondents (2525) / All who think manuka honey has additional health properties (1118) *Showing all responses 3% or greater

3

Purchasing of manuka honey



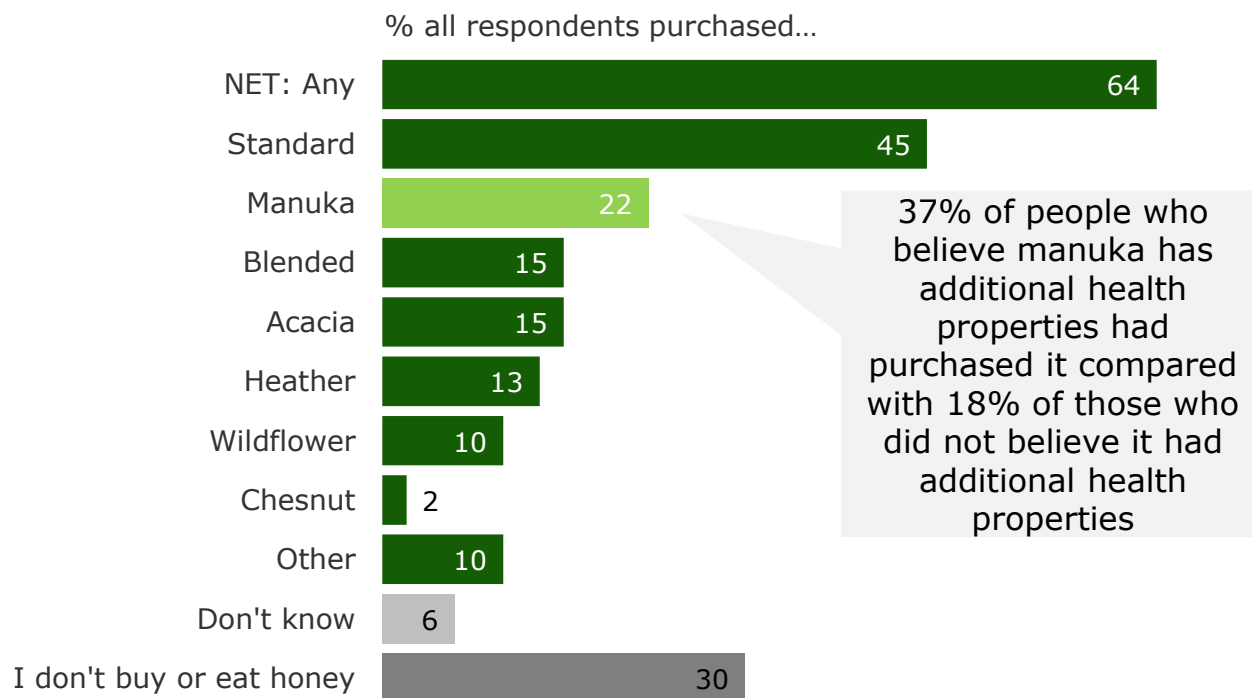
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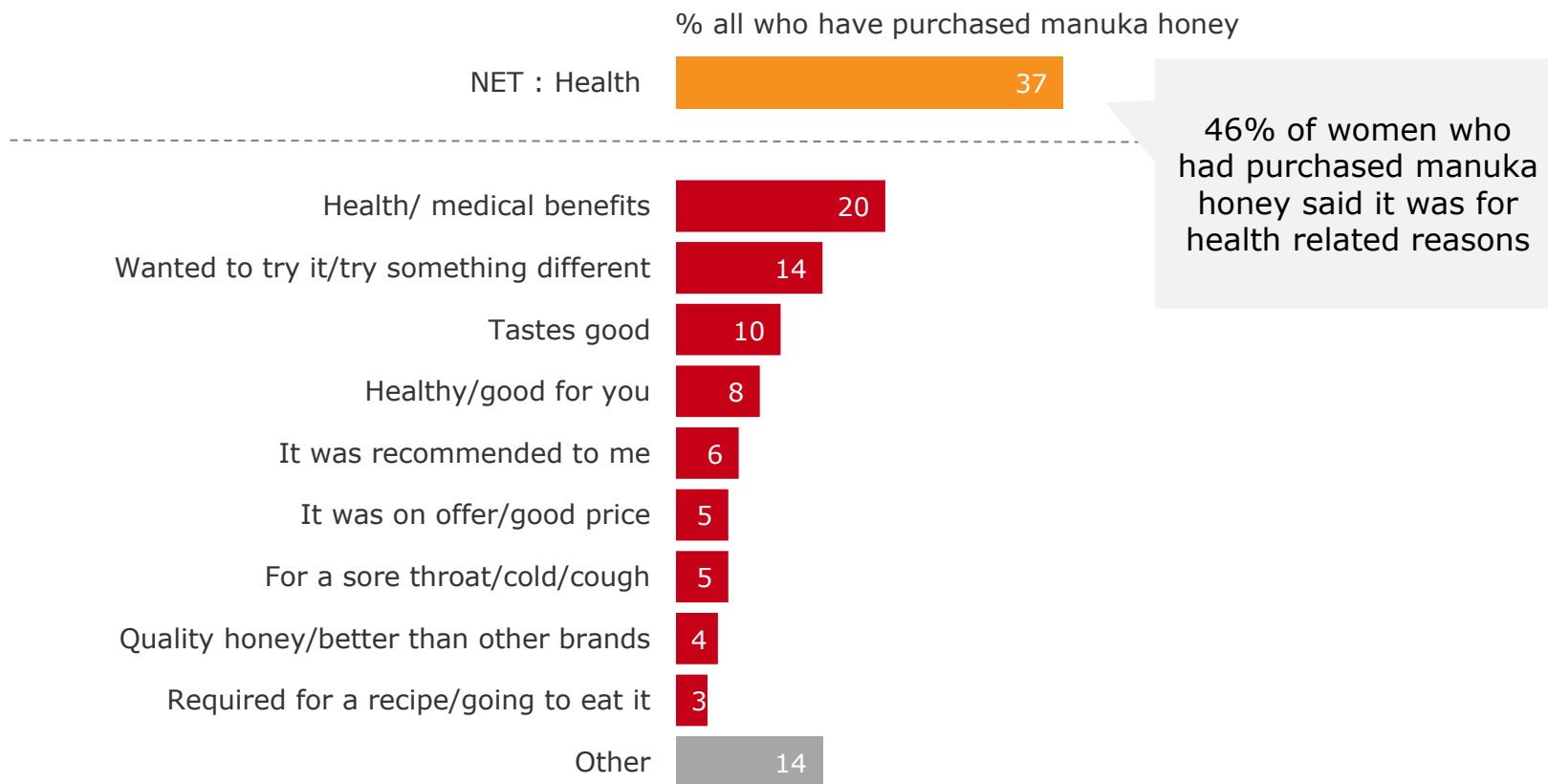
One in five people had ever purchased manuka honey, which accounts for almost a third of those who buy any type of honey.



46% of people who purchased manuka honey said they had previously looked for more information about the product before purchasing.

Source: Q003.Have you ever bought any of these types of honey to eat?
Base: All respondents (2525)

The most common reason given for purchasing manuka honey was related to perceived health properties, mentioned by two fifths of respondents



Source: Q005.What were your reasons for purchasing manuka honey?

Base: All who have purchased manuka honey (554)

4

Labelling of manuka honey



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Seven mock labels were shown, each with different words or phrases commonly found on manuka honey packaging



Active Manuka Honey



NPA Rating 10+
Manuka Honey



UMF 10+ Manuka



UMF 8+ Manuka



Manuka Honey

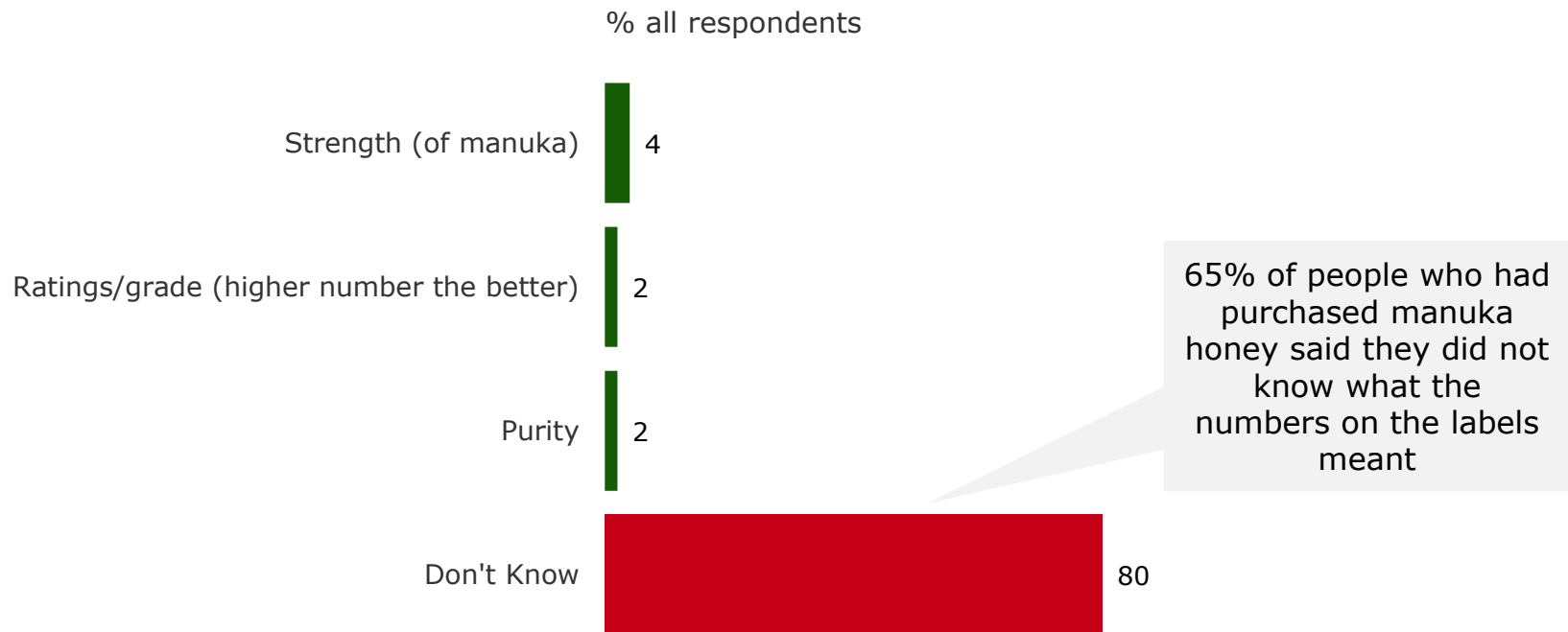


Manuka Honey
30mg/kg
methylglyoxal



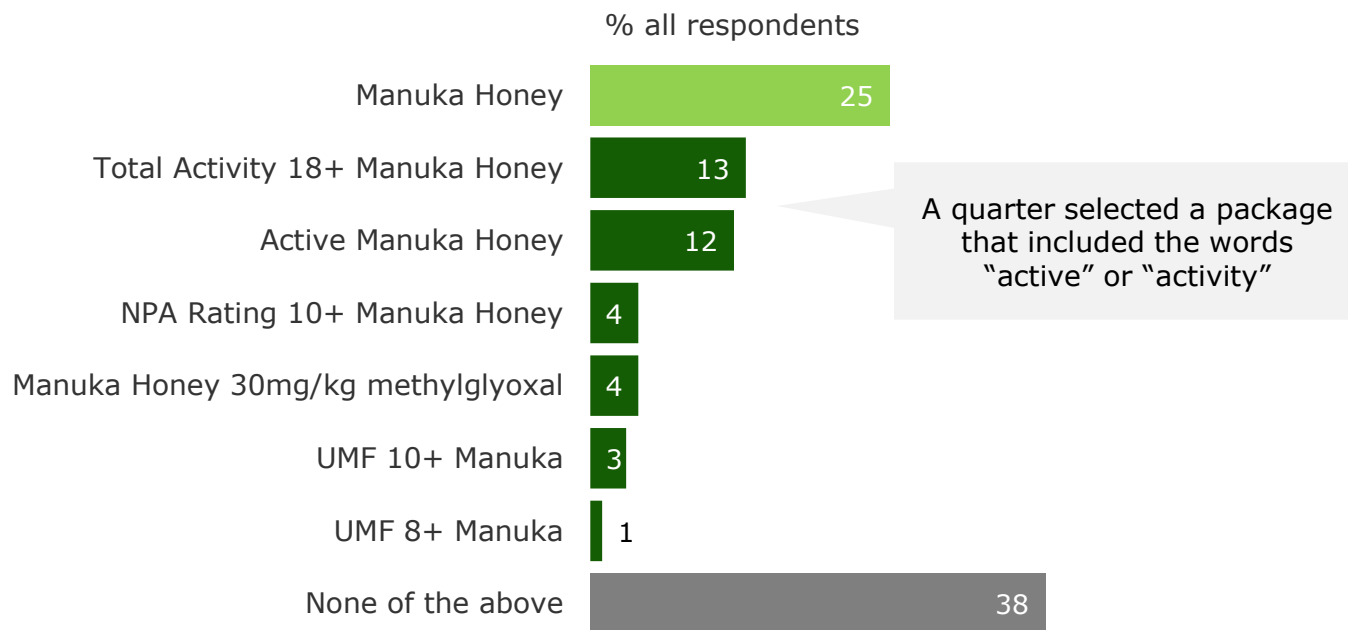
Total Activity 18+
Manuka Honey

After viewing the labels the vast majority of respondents did not know what the numbers on the labels referred to



Source: Q009.What do you think the numbers on these labels tell you about the manuka honey?
Base: All respondents (2525)

When asked which of the example manuka honeys they be most likely to buy, more selected the most generic 'Manuka Honey' label over any over

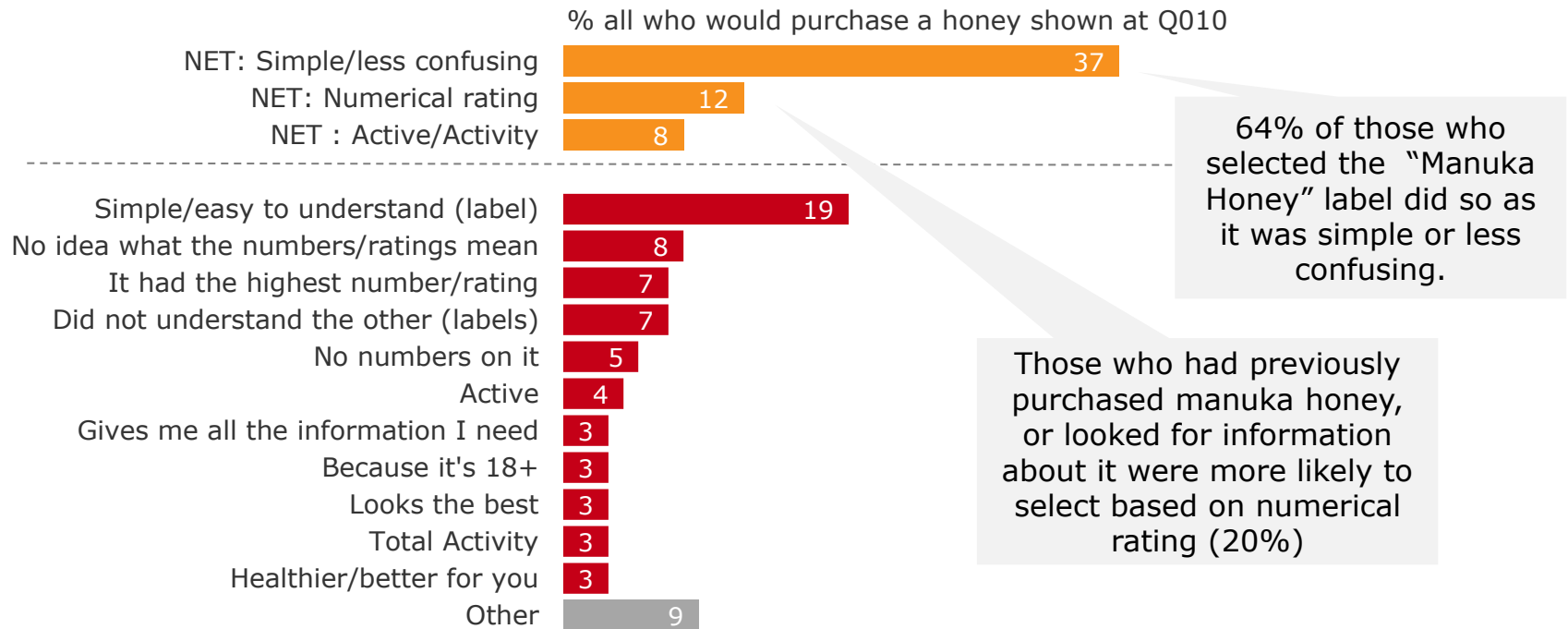


Respondents who had previously purchased manuka honey were more likely to select any of the options, particularly the packaging labelled "Total Activity 18+"

Source: Q010.Looking at the following jars demonstrating various grading systems, which one, if any, would you be most likely to purchase?

Base: All respondents (2525)

The most common reason for selecting a label was simplicity, only one in ten selected a label because of its numerical rating



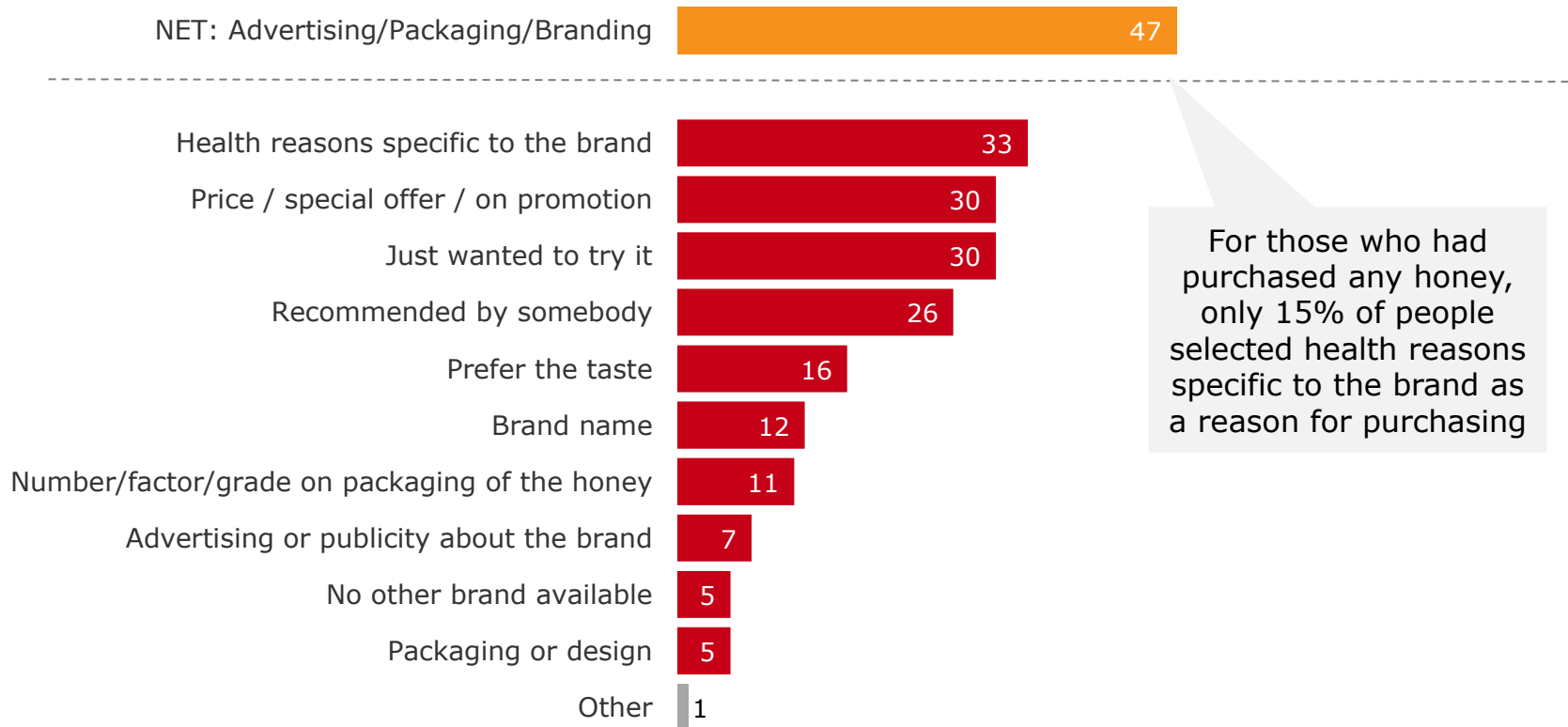
This reinforces the finding that almost all respondents do not understand the numerical ratings on labels, and many may in fact reject varieties of manuka honey due to not understanding the packaging

Source: Q011. Why did you select that manuka honey over the other options?

Base: All who would purchase a honey shown at Q010. (1565) *Showing responses 3% or greater

When asked about previous purchases, only one in ten said they had chosen a brand due to the numerical factor number displayed.

% all who have purchased manuka honey



Source: Q006.filtered Why did you choose the brand which you bought?

Base: All who have purchased manuka honey (554)

5

Attitudes towards manuka honey



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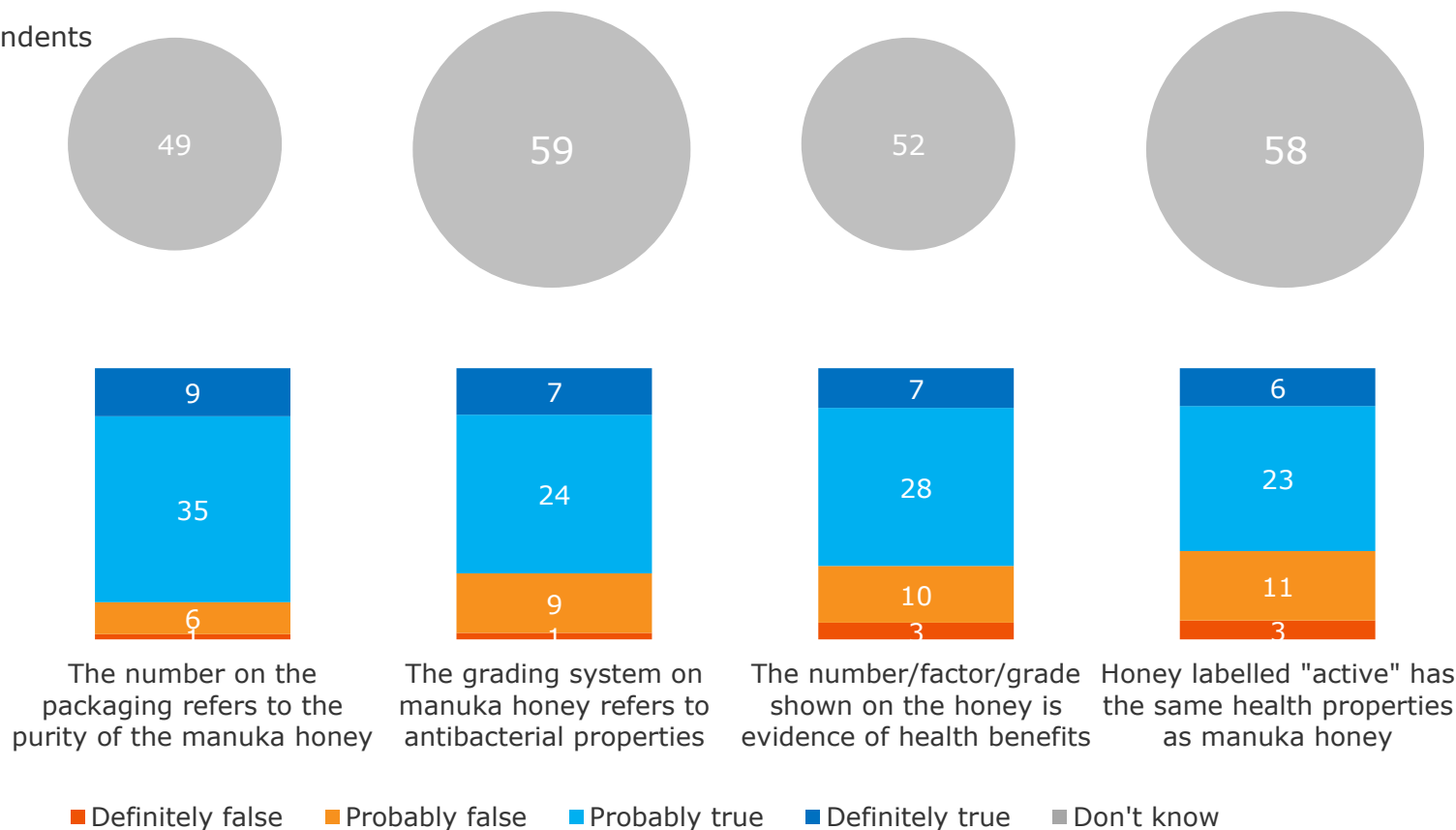
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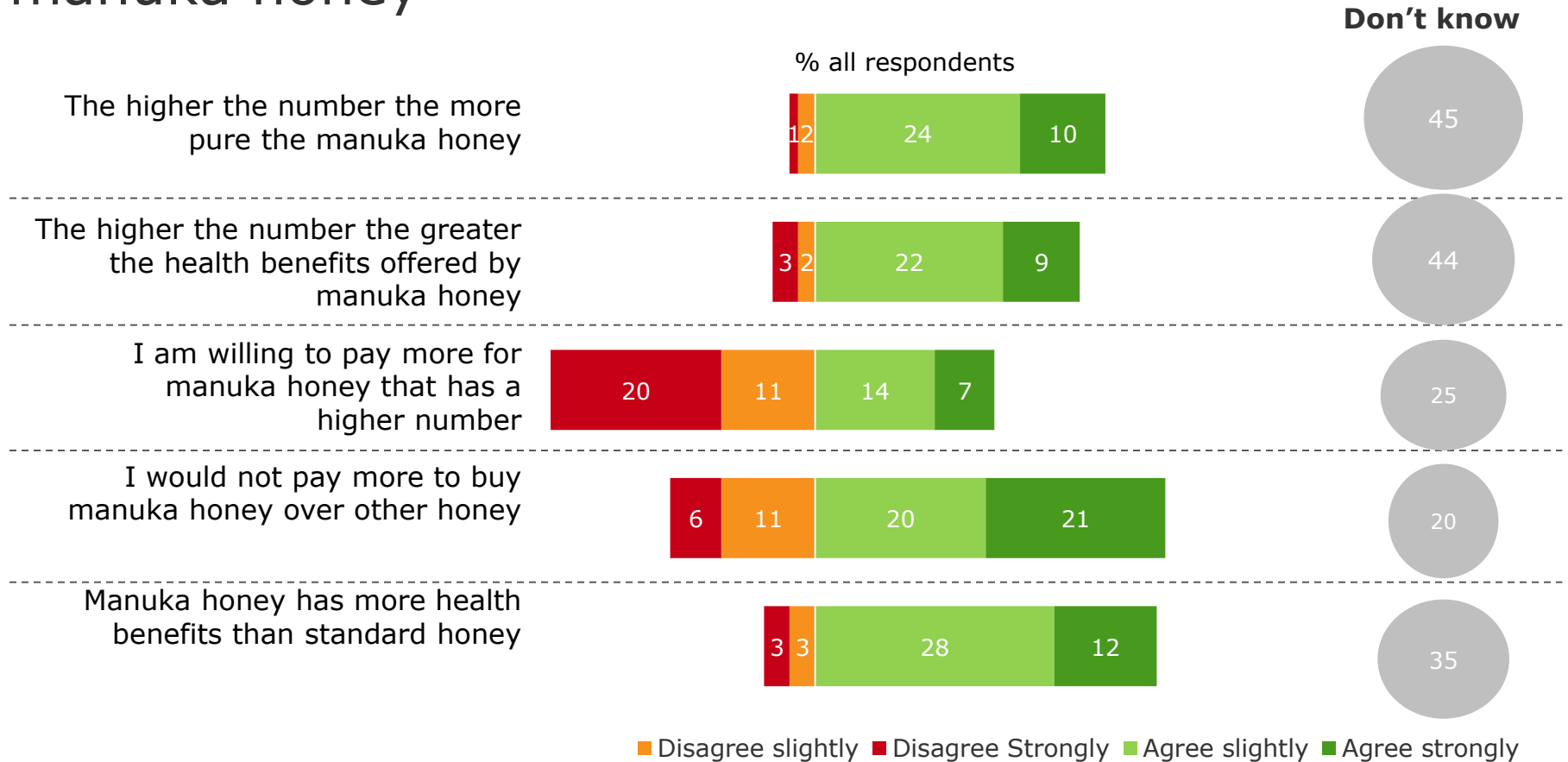
The meaning of the grading systems was not understood - over half don't know if each statement provided was true or false

% all respondents



Source: Q014. Do you think that the following statements are true or false?
 Base: All respondents (2525)

Responses to attitudinal statements reflected the general lack of knowledge and uncertainty about manuka honey



Source: Q015. How much do you agree or disagree with the following statements?

Base: All respondents (2525)

Of those previously aware of manuka honey, one in four have searched for more information, but only 14% had searched for details of claimed health benefits

% all previously aware of manuka honey



Source: Q016. Have you ever looked for more information about manuka honey?
Base: All previously aware of manuka honey (1715)

Manuka honey key findings

1

Awareness of manuka honey is relatively high, and 1 in 5 reported having bought it at least once

2

There is current uncertainty about whether manuka is different to other honeys: 39% don't know whether it's different, 20% think it is healthier

3

Perceived health benefits are driving 37% of purchase (46% for women) – but people are vague about what these health benefits actually are

4

Grading system is poorly understood and confusing, with some making the assumption that the higher the number, the better the honey (and 23% prepared to pay more for it) – but they don't know why