



CRC**HBP**
FOR HONEY BEE PRODUCTS

Developing the Story for WA Honey: Initial Survey Results

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Cooperative Research
Centres Program



THE UNIVERSITY OF
**WESTERN
AUSTRALIA**









Department of
Primary Industries and
Regional Development



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Presentation Structure

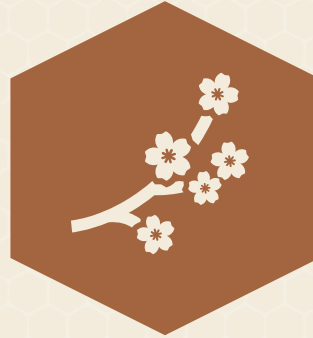
-  Project background
-  Research objectives
-  Methodology
-  Initial Findings
-  Narrative Examples
-  Next Steps



Project Background



Developments in chemical testing and tracing allow us to confirm the antioxidant and antibacterial components as well as the provenance and pollen content of the honeys.



We therefore have the potential to create a stronger narrative around the rarity, flavour and health qualities of some of our unique mono-floral honeys.



There is a real opportunity here for Western Australia to create its own regional marketing strategy. This lifts the entire industry as it ensures a consistent, effective message for WA.



Research Objectives



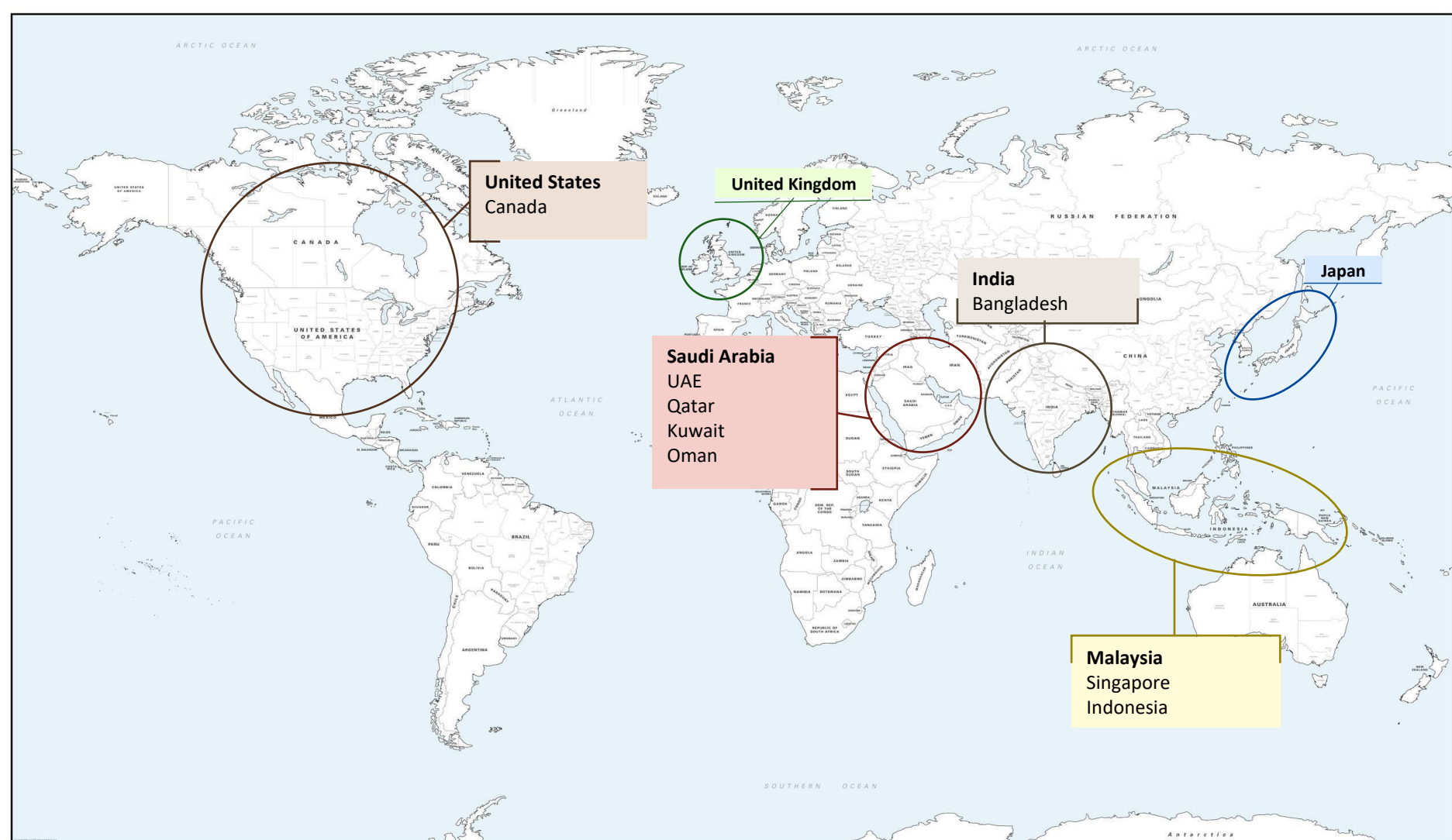
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Export Markets for Analysis





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Recap of our findings so far

- ▶ Our previous research found that consumers from different countries had differing expectations and preferences for honey
- ▶ We identified four primary narratives (Health, Production, Flavour, Terroir) to test within those markets to determine which combinations might garner a premium price point.
- ▶ Combining the findings of all our research, we will create a marketing strategy that best targets each of our six markets to lift up the industry as a whole.

Recap of our expectations for quantitative stage

Price premiums: The highest price point for each country may vary depending on the narrative(s) and consumer differences

Consumers' willingness to buy: Factors that influence this will be determined based on the effectiveness of narratives, controlling for -



Consumer differences: We are currently reviewing literature on *consumer honey knowledge, perception of Australia and other factors* that may affect honey purchase



Market Segmentation: Differences in narratives' effectiveness is expected per country, as well as differences in segments of each population



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Objectives for quantitative stage

Objectives



Overarching objectives of this research include understanding WA honey's current market position, namely:

- » Assess **consumer preferences** for honey, spending, and factors considered important when choosing premium honey
- » Assess the impact of different **narratives** on the willingness of consumers to pay for WA honey
- » Assess **preferences** amongst consumers based on **gender, age & life stage** (no children, 2-3 children, more than three children)
- » Assess potential consumer groupings (**segmentation**) based on consumer preferences, country or demographics



Methodology



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Methodology: quantitative research was conducted to collect detailed data about consumers' purchasing habits, preferences and attitudes from a large group of consumers in each market.



Experiment was designed where participants were randomly allocated to **one of the narratives**. Respondents also completed consumer behaviour questions after an exposure. The experiment took on average 10 minutes to complete.



Respondents:

- ▶ Approached using an external panel provider that connected us to participants within each country
- ▶ Participants were over 18 and must have bought honey previously
- ▶ Experiment was translated into the relevant language

Example Question

I am able to tell the difference between a '**premium, high quality honey**' and a standard offering, because it is/has:

	Strongly Disagree	Somewhat Disagree	Neither	Somewhat Agree	Strongly Agree
A bio-activity measurement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Health benefits	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Come straight from the hives/beekeeper	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Raw honey	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A specific flower source (eg. Clover, Jarrah, Manuka)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Limited edition/ batch	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Not mass produced	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Packaged in a glass jar	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Smaller size packaging	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Specific flavour (different tasting notes)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A rating by a certified organisation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



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Narratives used in the experiment

Terroir



Production



Narrative Conditions

Health



Flavours





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Narrative Conditions

Does the specificity of the region matter?

Australian Honey

Quality honeys,
made in Australia.

Jars available now to try



West Australian Honey

Quality honeys,
made in Western Australia.

Jars available now to try



South West Australian Honey

Quality honeys, made in
South Western Australia.

Jars available now to try





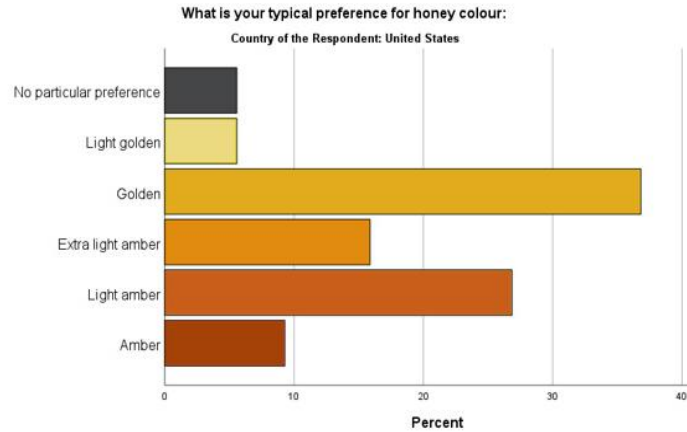
Initial Findings

Findings reported over the next slides apply only to **‘premium’ buyers**, who were defined as individuals who were willing to pay more than the average (median) consumer in the sample when they were asked how much they were willing to pay for the honey that they saw in an experimental condition that they were allocated to.



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United States



Premium Buyer Profile

Age = 25-34 years old

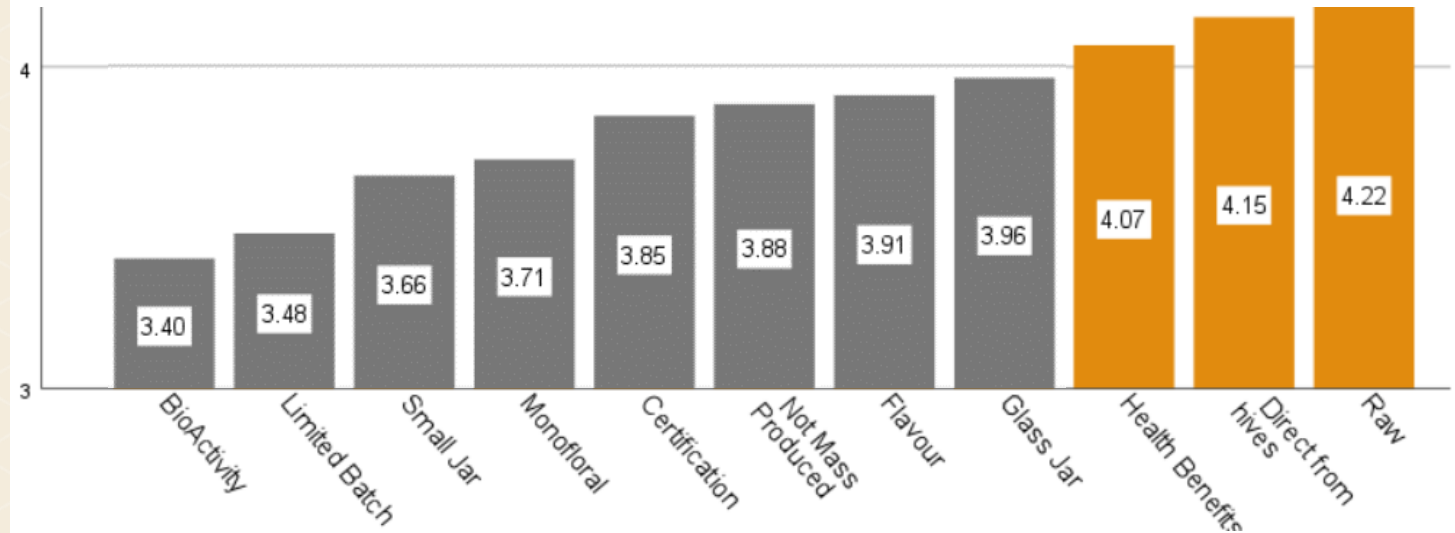
Gender = More males compared to cheaper buyers

Household = Living with partner and children

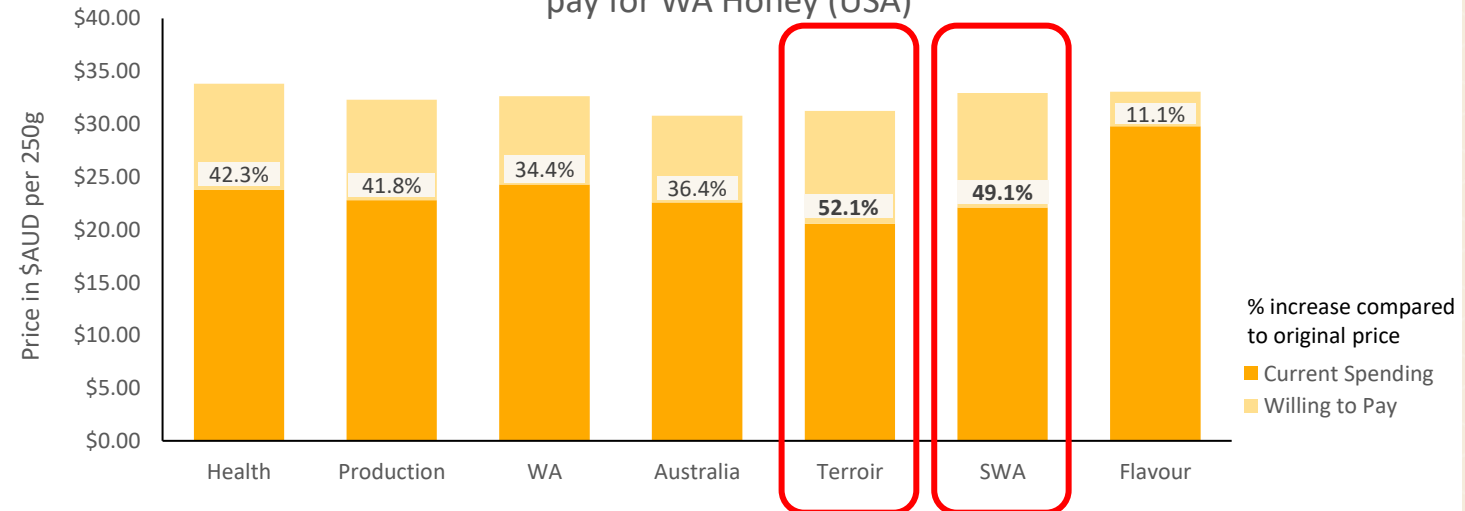
Income = Above the median household income

Education = University Education

Attributes consumers use to identify premium honey
(Measured on a 1 to 5 scale, over 4 = agree/strongly agree)



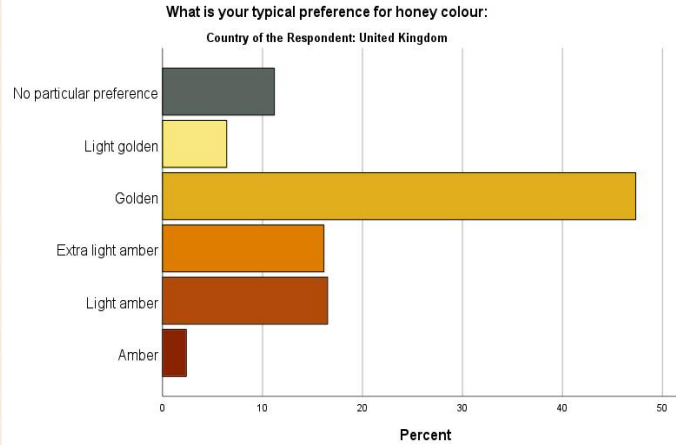
Price difference between current purchases and amount they are willing to pay for WA Honey (USA)





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United Kingdom



Premium Buyer Profile

Age = 18 to 34 years old

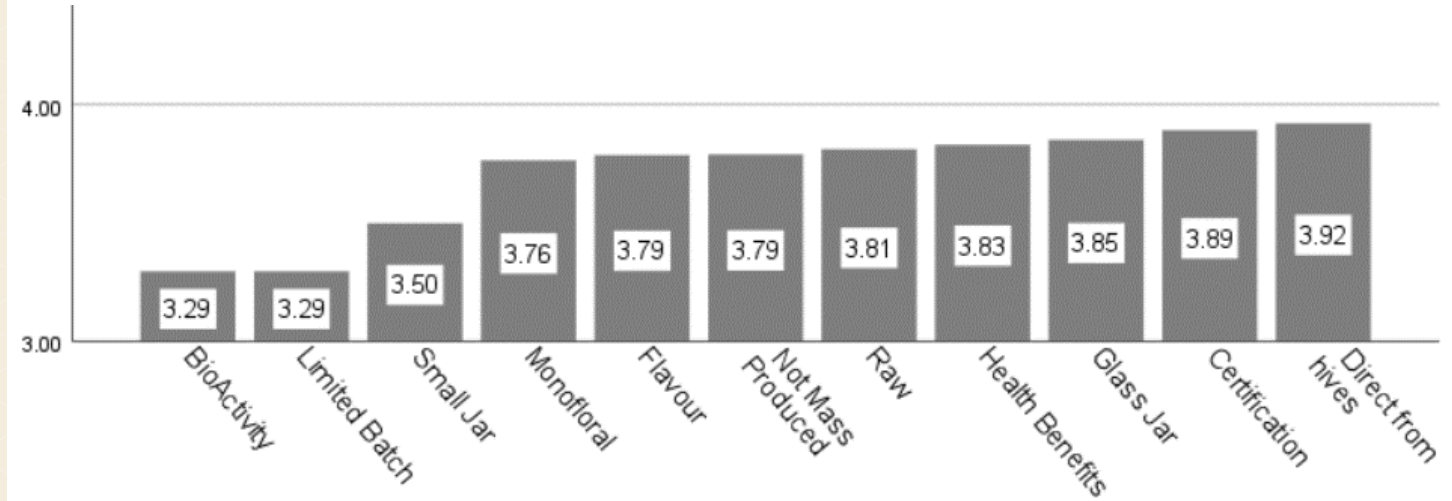
Gender = More females compared to cheaper buyers

Household = Living with partner and children

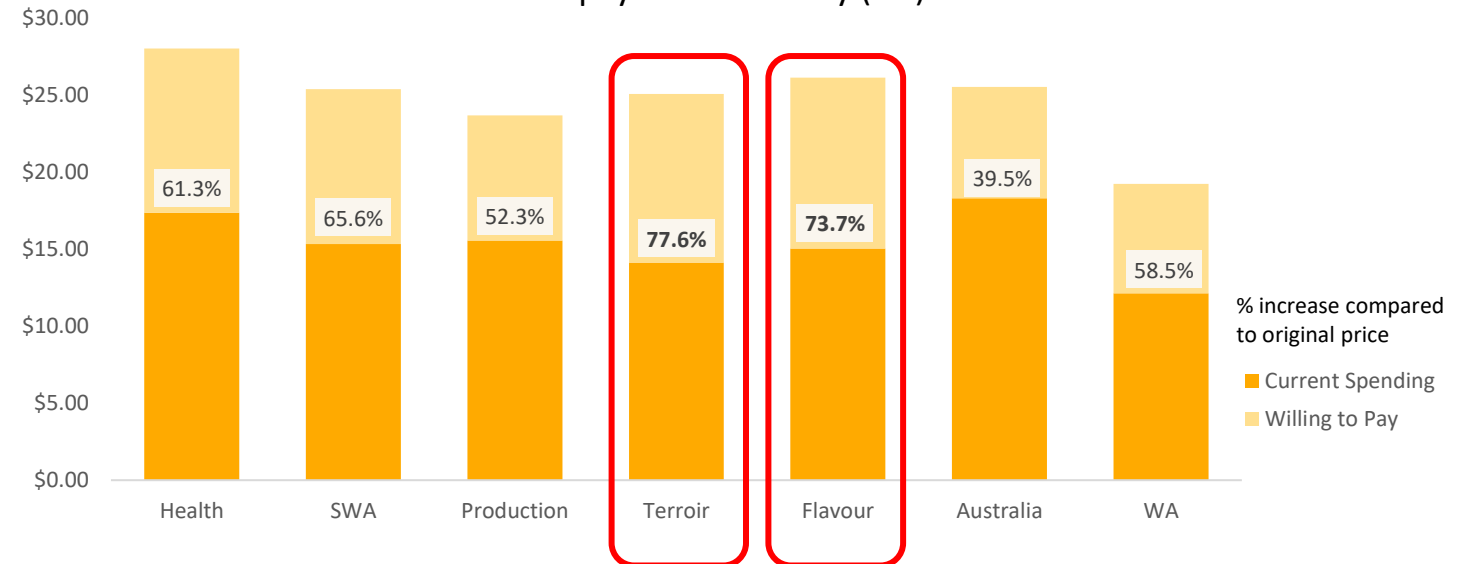
Income = Above the median household income

Education = University Education or Vocational training

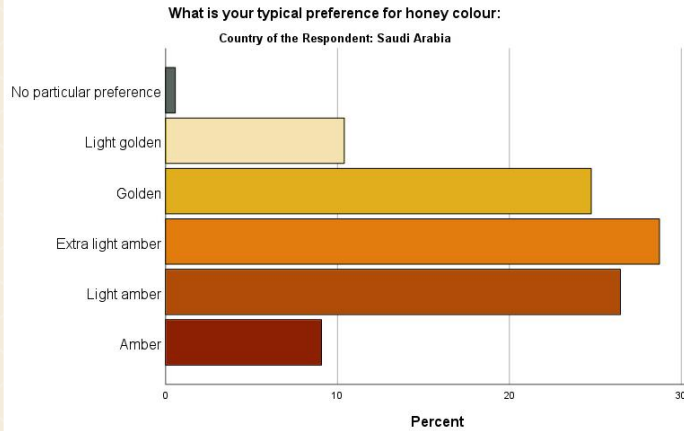
Attributes consumers use to identify premium honey
(Measured on a 1 to 5 scale, over 4 = agree/strongly agree)



Price difference between current purchases and amount they are willing to pay for WA Honey (UK)



Saudi Arabia



Premium Buyer Profile

Age = 25-44 years old

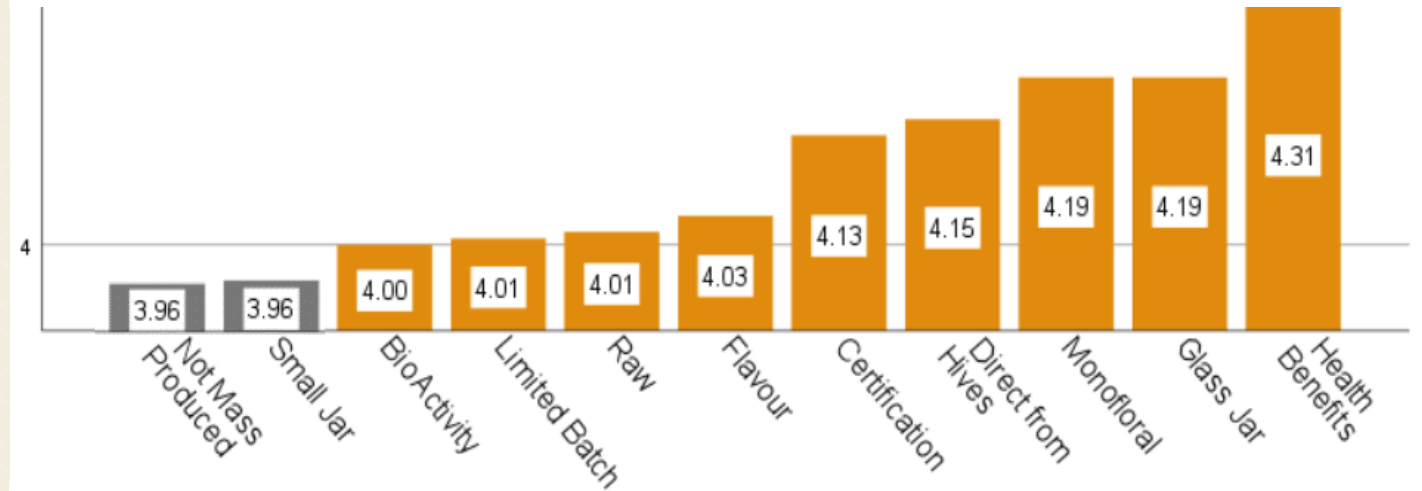
Gender = more males compared to cheaper buyers

Household = Living with a partner and no children

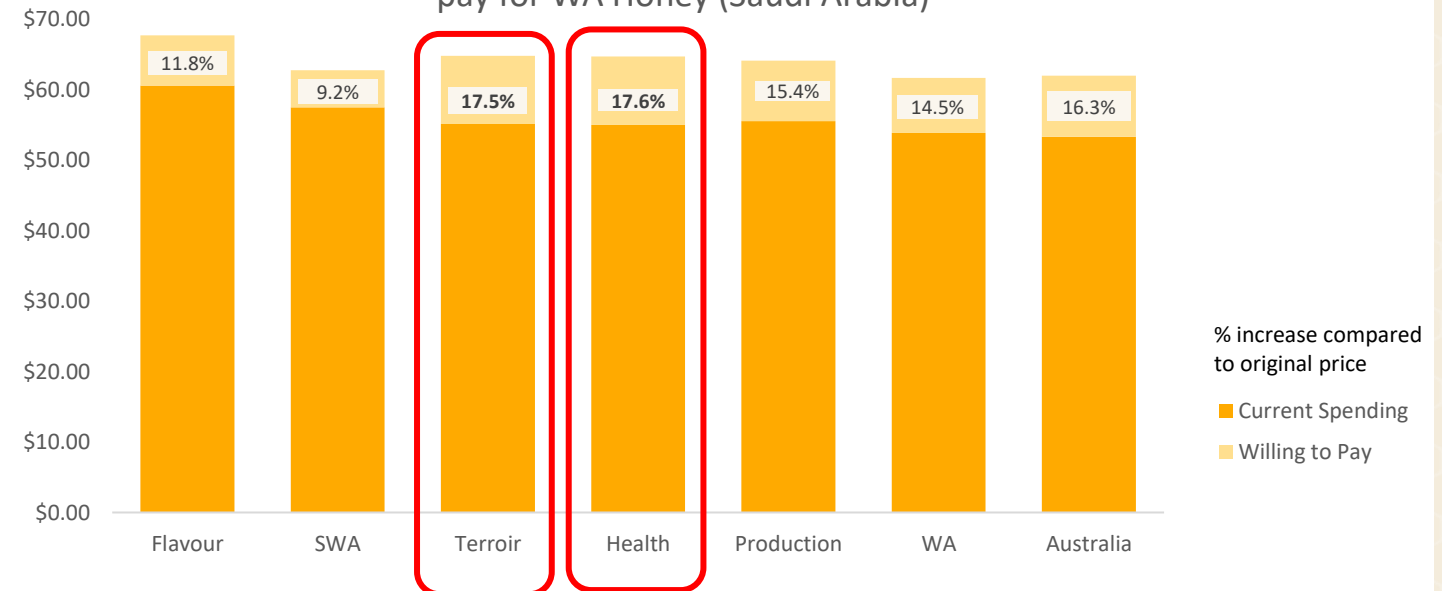
Income = above the median household income

Education = Vocational training or Post-graduate degree

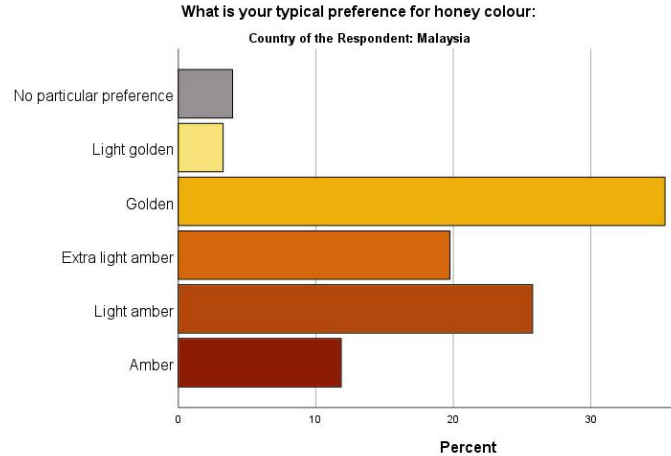
Attributes consumers use to identify premium honey
(Measured on a 1 to 5 scale, over 4 = agree/strongly agree)



Price difference between current purchases and amount they are willing to pay for WA Honey (Saudi Arabia)



Malaysia



Premium Buyer Profile

Age = 25 to 44 years old

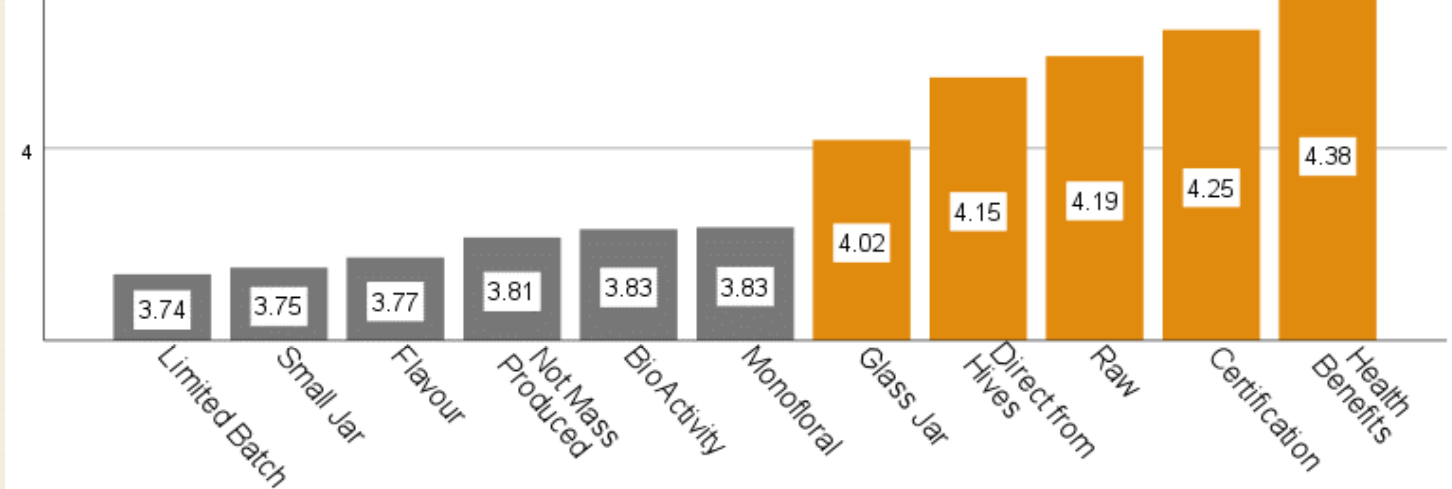
Gender = No difference

Household = Less likely to be in multi-generational living

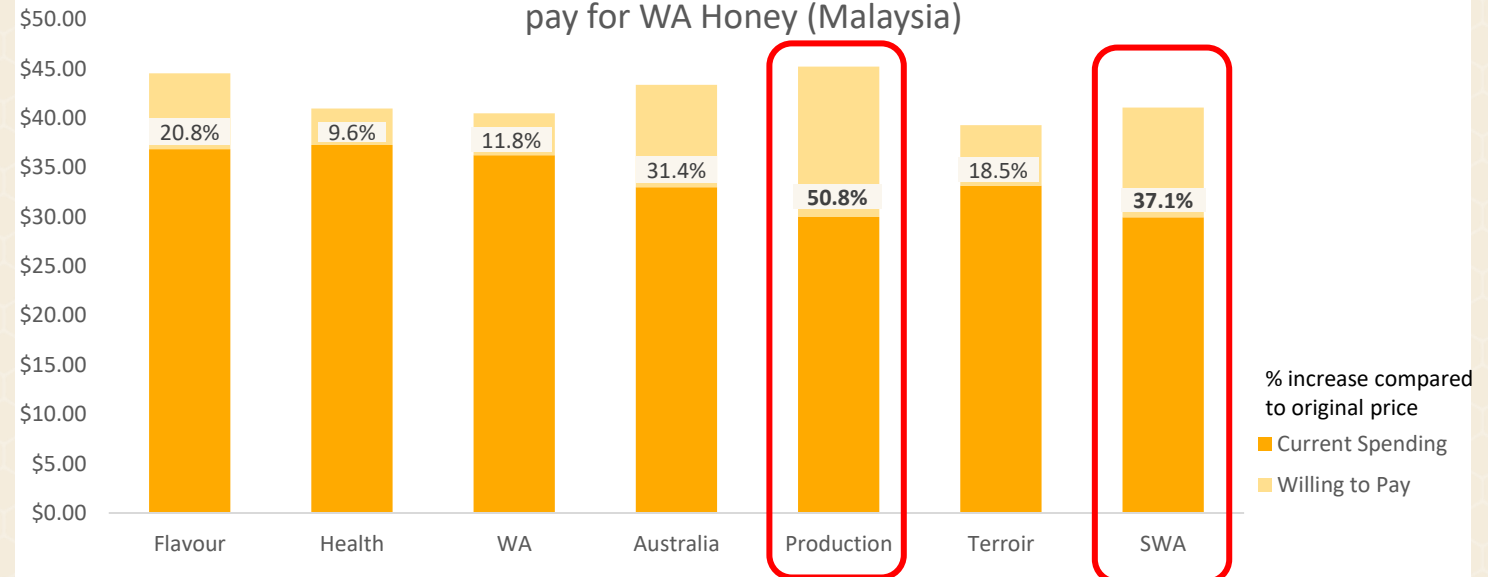
Income = About the median household income

Education = Post-graduate degree

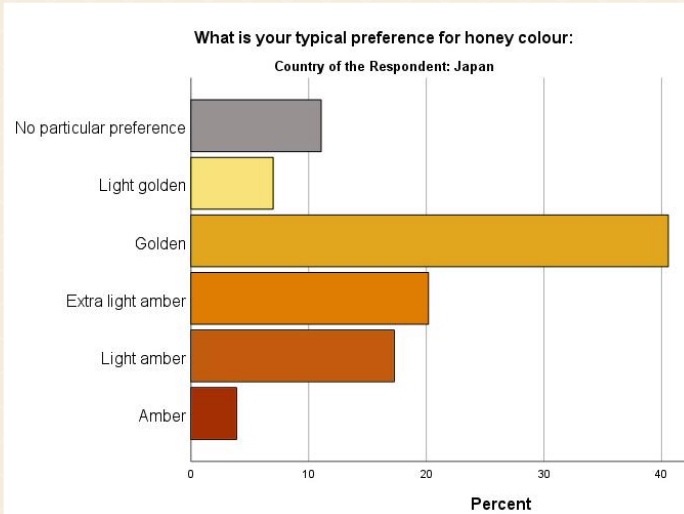
Attributes consumers use to identify premium honey
(Measured on a 1 to 5 scale, over 4 = agree/strongly agree)



Price difference between current purchases and amount they are willing to pay for WA Honey (Malaysia)



Japan



Premium Buyer Profile

Age = 55 years and over

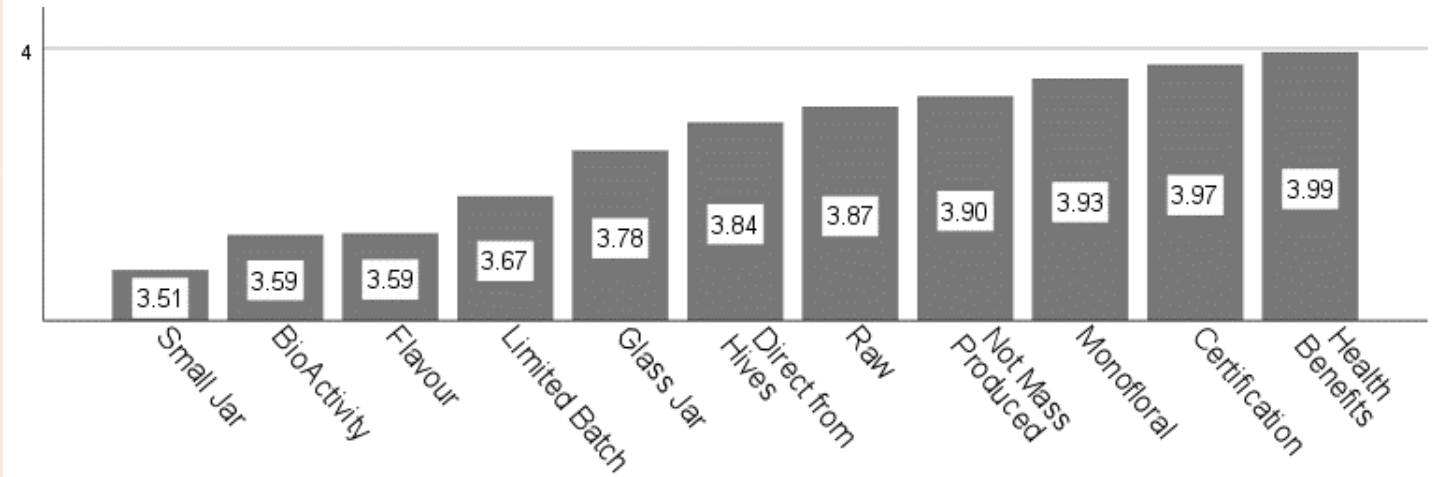
Gender = More males compared to cheaper buyers

Household = Living with partner and children

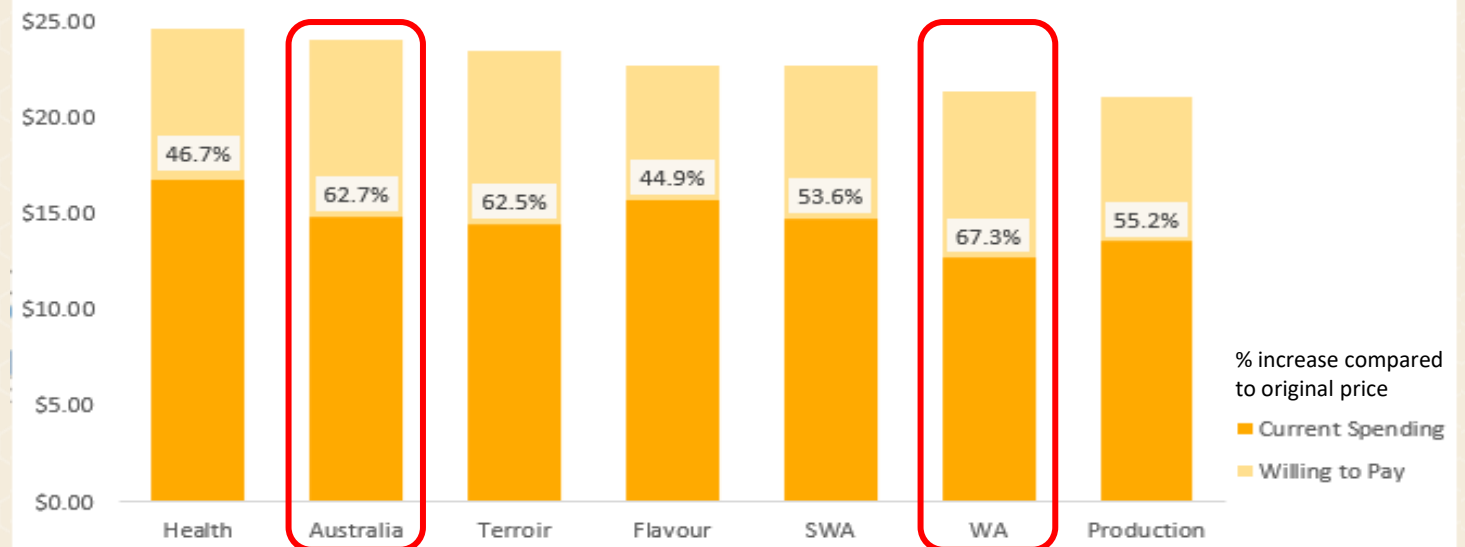
Income = At or above the median household income

Education = University educated

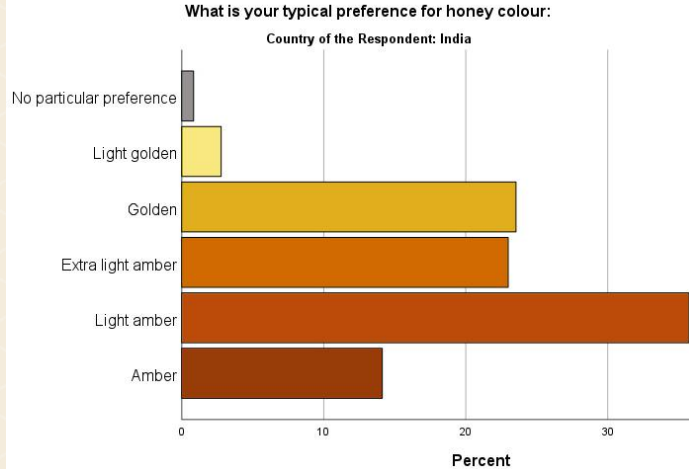
Attributes consumers use to identify premium honey
(Measured on a 1 to 5 scale, over 4 = agree/strongly agree)



Price difference between current purchases and amount they are willing to pay for WA Honey (Japan)



India



Premium Buyer Profile

Age = 25 – 44 years old

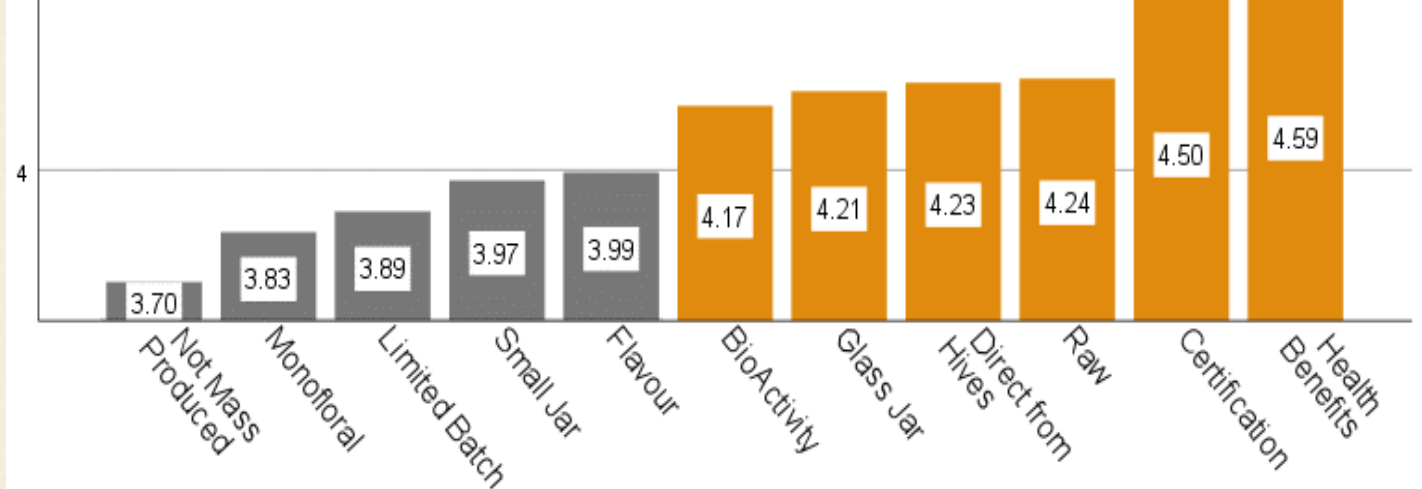
Gender = More females than cheaper buyers

Household = Less likely to be in multi-generational living

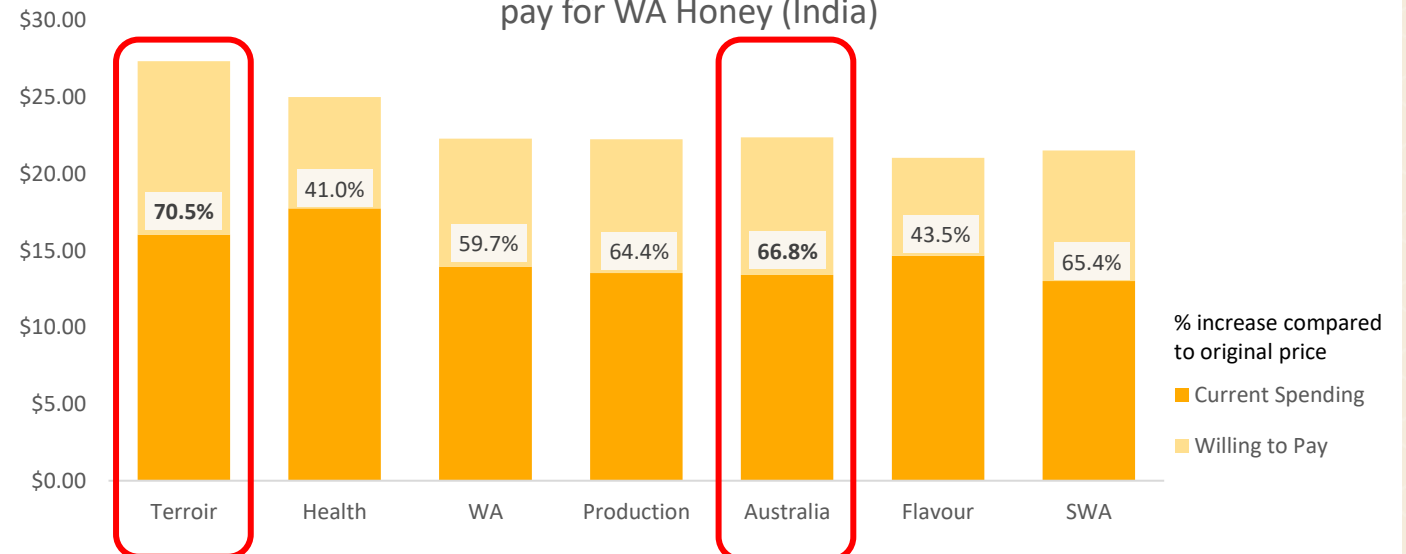
Income = Above the median household income

Education = Vocational training or Post-graduate degree

Attributes consumers use to identify premium honey
(Measured on a 1 to 5 scale, over 4 = agree/strongly agree)



Price difference between current purchases and amount they are willing to pay for WA Honey (India)

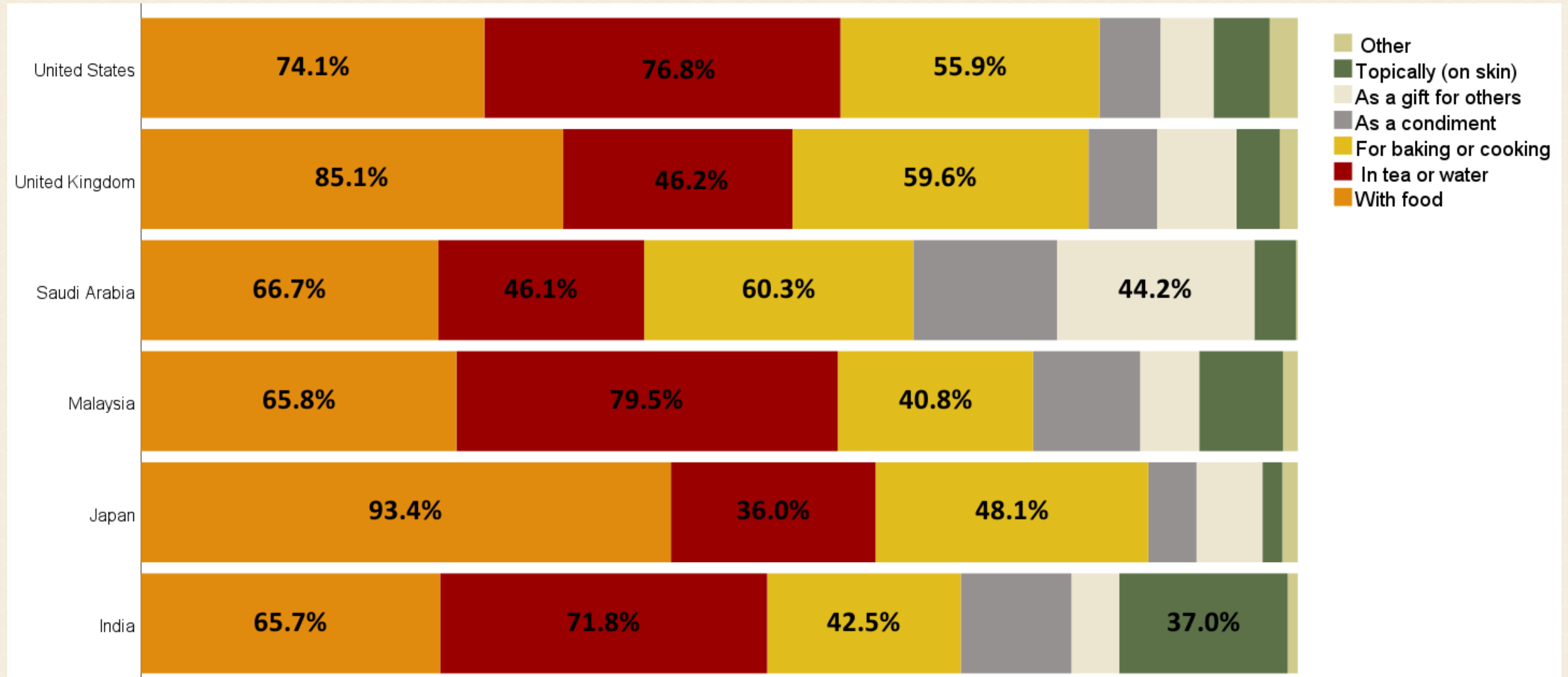




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Percentage of consumers that use honey for each category

(note that users report multiple usage types, so % do not add to 100)





Next Steps



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Next Steps

Social Media Marketing Strategy

We will detail our findings
in a CRC-HBP report &
make recommendations
for future marketing
strategies.



CRC Report



Create overarching strategy
Imagery repository of WA honey
Measure engagement
over time

Next Steps

Report to CRC

Insights into honey preferences for sweetness, thickness, etc.

Additional insights into consumer profiles for premium buyers and frequent buyers.

Additional insights into current purchasing behaviours i.e. purchase frequency, preferred size of jars etc.

Further analysis on market segmentation (impact of age, gender, income etc.)

A strategy outline for targeting each country.

Social Media Marketing Strategy

Produce content across three platforms (Instagram, Facebook, Blog) that targets the most effective narratives for each group

Work with photographers to increase the repository of food and drink imagery.

Consult influencers from target countries to work with our products in their own content



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Narrative Examples

Production (Facebook)



WestAustralianHoney

5 minutes ago



Don't try this at home! -

Our beekeepers care for their bees with the utmost respect and care. They have a relationship with their animals built on years of skill and trust, allowing them to handle these precious animals without gloves.

Flavour (blog)

Honey Cake Recipe



- 1 cup plus 2 tbsp. flour
- 1 tsp. baking powder
- 1/4 tsp. baking soda
- 1/4 tsp. salt
- 1/3 cup vegetable oil
- 1/3 cup honey (plus some for drizzling over the batter)
- 1/2 cup granulated sugar
- 2 1/2 tbsp. brown sugar
- 1 large egg
- 1/2 tsp. vanilla
- 1/3 cup coffee
- 2 1/2 tbsp. orange juice

Preheat the oven to 180°C (350f) and generously grease a 23cm round baking pan, or equivalent loaf pan, with butter. In a large mixing bowl, combine the flour, baking powder, baking soda, and salt.

Add the oil, honey, sugar, brown sugar, eggs, vanilla, coffee and orange juice. Mix thoroughly, until all ingredients are combined and no lumps remain.

Pour the batter into the prepared pan and drizzle some honey over the batter.

Bake until the cake is set all the way through and feels springy to the touch (30 to 60 minutes, depending on the size of your baking dish). A tester inserted into the center should come out clean.

Let cool 15 minutes before removing from the baking dish.

Enjoy.

Terroir (Instagram)



WestAustralianHoney

Have you ever taken the time to really look at the trees around you? Every tree in our unique landscape has a different pattern, texture and colour, just like every honey that we produce from them has a different flavour. Can you guess which bark belongs to which tree species?



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Health Narrative - Legal Boundaries

Type of claim	Criteria
Therapeutic claim	Strictly prohibited for food products by both Standard 1.2.7 and the Therapeutic Goods Act
High level health claim	<ul style="list-style-type: none">- Must be pre-approved- Must meet the NPSC
General level health claim	<ul style="list-style-type: none">- Can be pre-approved or self-substantiated- Must meet the NPSC
Endorsement	<ul style="list-style-type: none">- Must be made by an independent not-for-profit
Nutrition content claim	<ul style="list-style-type: none">- Compositional thresholds for certain claims- All other claims permitted but restricted
Remember other regulatory regimes	<ul style="list-style-type: none">- Outside the scope of 1.2.7- Must be assessed for compliance with ACL- Do you want to be there?

Category	NPSC category	The *nutrient profiling score must be less than:
1	Beverages	1
2	Any food other than those included in category 1 or 3	4
3	<ul style="list-style-type: none">a) Cheese or processed cheese with calcium content greater than 320 mg/100 g; orb) edible oil: orc) edible oil spread; ord) margarine; ore) butter.	28

Note: With regard to NPSC category 3(a), all other cheeses (with calcium content of less than or equal to 320 mg/100 g) are classified as an NPSC category 2 food.



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Health Narrative - Legal Boundaries

NUTRITIONAL INFORMATION

Serving size 28g (1 Tablespoon)

Average Quantity

per serve (28g) per 100g

Energy	389kj	1390kj
Protein	0.2g	0.6g
Fat	Nil	Nil
saturated	Nil	Nil
Carbohydrate	23g	81g
Total simple sugars	22g	79.8g
Sodium	6mg	22.4mg

Natural honey can vary from batch to batch.
The above information is indicative only.

Table 1—Baseline points for Category 1 or 2 foods (per unit quantity)

<i>Baseline points</i>	<i>Average energy content (kJ)</i>	<i>Average saturated fatty acids (g)</i>	<i>Average sugars (g)</i>	<i>Average sodium (mg)</i>
0	≤ 335	≤ 1.0	≤ 5.0	≤ 90
1	> 335	> 1.0	> 5.0	> 90
2	> 670	> 2.0	> 9.0	> 180
3	> 1 005	> 3.0	> 13.5	> 270
4	> 1 340	> 4.0	> 18.0	> 360
5	> 1 675	> 5.0	> 22.5	> 450
6	> 2 010	> 6.0	> 27.0	> 540
7	> 2 345	> 7.0	> 31.0	> 630
8	> 2 680	> 8.0	> 36.0	> 720
9	> 3 015	> 9.0	> 40.0	> 810
10	> 3 350	> 10.0	> 45.0	> 900

So what CAN we say?

Can use 'health' imagery -

show it as part of a healthy
diet, outdoors/active lifestyle

can still benefit from the general
perception of honey as a health
food.



WestAustralianHoney

Nothing like slowing down, breathing in the fresh air and listening to the birds singing in the Karri forests to make you feel good.

Experience it for yourself by picking up some Karri honey and savouring the tastes, smells and colours of the forests
#pureandnatural #rawhoney #

Research and development supported
by the CRC for Honey Bee Products -

can show the findings etc.
but must remain in context

(i.e. can't **EXPLICITLY** link it to
commercial products)



WestAustralianHoney

West Australian honey is at the forefront of research. Here, scientists from the @uwanews biomedical centre are testing samples to measure the potential of our honey to kill harmful bacteria. #research #crchbp #uwanews #bioactivehoney

Health of the bees –
Biosecurity
NO pesticides
NO anti-biotics
NO varroa



WestAustralianHoney

Did you know our beekeepers drive around 60,000kms a year following the bloom cycle of native trees across our beautiful state? By travelling to remote areas of native forest we ensure that our honey is free from the impact of pesticides, pollution and other contaminants. #pureandnatural #rawhoney

How you can be involved?



Shape the narrative

We will develop the stories within our narratives based on YOUR experiences and relationship with WA honey – we might ask for your opinions or stories, or to clarify facts to ensure we are representing YOU.



Through your eyes

We are asking for assistance in creating visual imagery and specific stories – we would love any content that you have you would be keen to share (i.e. images or videos)



Engage with Us

We need to build our following through our social media campaign so we ask that if you/your company have social media accounts to please engage with us by sharing/liking and commenting on the content to encourage engagement.



@WestAustralianHoney



WestAustralianHoney



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FOR HONEY BEE PRODUCTS



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