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## Honey Industry Data

### Step 1. May - June

We analysed 64 companies' websites and social media platforms to examine the overall branding of WA honey companies and how they are marketing themselves to consumers. Content analysis focused on attributes most heavily promoted by industry revealing that **the main themes were around the natural and unique taste of honey, the Western Australian bee-industry, and the purity of the honey.** This gives a baseline of what information consumers currently receive about WA honey.

### Step 2. June - August

We then completed interviews with 15 honey packers, producers and stakeholders to investigate which aspects of honey marketing they felt required most improvement and if these were consistent across the entire WA beekeeping community. We found that **biosecurity of WA, environmental values and educating consumers** were most frequently mentioned in the interviews (n=7; n=4; n=4 respectively) and websites (n=1; n=21; n=4 respectively). Participants also identified key areas of consumer knowledge that they would like to improve – such as their awareness of monoflorals, how and why honey is processed and how bioactivity is measured.

#### Key Messages from Stakeholders:

- Total Activity
- Isolation and biosecurity
- Uniqueness of WA flavours
- Environmental ethos

## Preliminary Consumer Data

### Step 3. August – September

To establish any gaps between the current marketing strategy and consumers' perceptions/ desires, we conducted 6 focus groups with honey consumers currently located in WA from 6 target countries (India n=5, Japan n=5, Malaysia n=3, Saudi Arabia n=2, United Kingdom n=1, United States n=2). We found that each country had specific preferences, both for honey product attributes as well as for the marketing strategy used, influenced by the advertising trends in their countries of origin. Additionally, honey usage differed in each country, although the most consistent uses were as an alternative to sugar (most often added to drinks) and as a medical supplement or tonic for coughs and colds.

#### Some honey myths from our focus groups:

- metal spoons kill bioactivity
- pure honey forms a honeycomb shape when put into cold water
- crystallisation occurs when bees are fed sugar

|                     | Middle East | India | UK | Japan | US | Malaysia | <Uses for honey as reported by consumers from each target country. |
|---------------------|-------------|-------|----|-------|----|----------|--|
| As a sweetener      | ✓           | ✓     | ✓  | ✓     | ✓  |          |  |
| Medical consumption | ✓           | ✓     | ✓  | ✓     |    | ✓        |  |
| As skincare         | ✓           | ✓     | ✓  |       |    |          |  |
| As a spread         | ✓           |       |    | ✓     |    |          |  |
| Wound treatment     | ✓           | ✓     |    |       |    |          |  |
| In baking/cooking   |             |       |    | ✓     |    | ✓        |  |
| To make mead        |             |       |    |       | ✓  |          |  |

#### Australian honey associations

When asked what attributes they associated with Australian honey after they had tried it, clear country differences emerged (see table below). **Malaysia, India and the US had the most consistent views of Australian honey** (premium, pure & natural, native flowers) while Japanese consumers mostly considered honey in relation to marketing imagery (gifts, honey dippers). **Middle Eastern consumers had much more negative views** of the honey (low quality, high sugar) while the British consumer most associated it with local production.

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Participants noted that they always see imagery of dippers but do not know what they are or how to use them so they get confused.



|                      | Middle East | India | UK | Japan | US | Malaysia |
|----------------------|-------------|-------|----|-------|----|----------|
| Premium quality      |             | ✓     |    | ✓     |    | ✓        |
| Uniform packaging    | ✓           |       |    |       | ✓  | ✓        |
| Pure and natural     |             | ✓     |    |       |    | ✓        |
| Dark Colour          |             | ✓     |    |       | ✓  |          |
| Variety of Flavours  |             | ✓     |    |       | ✓  |          |
| Native flowers       |             |       |    |       | ✓  | ✓        |
| Good gift            |             |       |    | ✓     |    |          |
| Linked to health     |             |       |    | ✓     |    |          |
| Wooden honey dippers |             |       |    | ✓     |    |          |
| Low quality          | ✓           |       |    |       |    |          |
| Low Variety          | ✓           |       |    |       |    |          |
| High sugar content   | ✓           |       |    |       |    |          |
| Local Production     |             |       |    |       |    | ✓        |

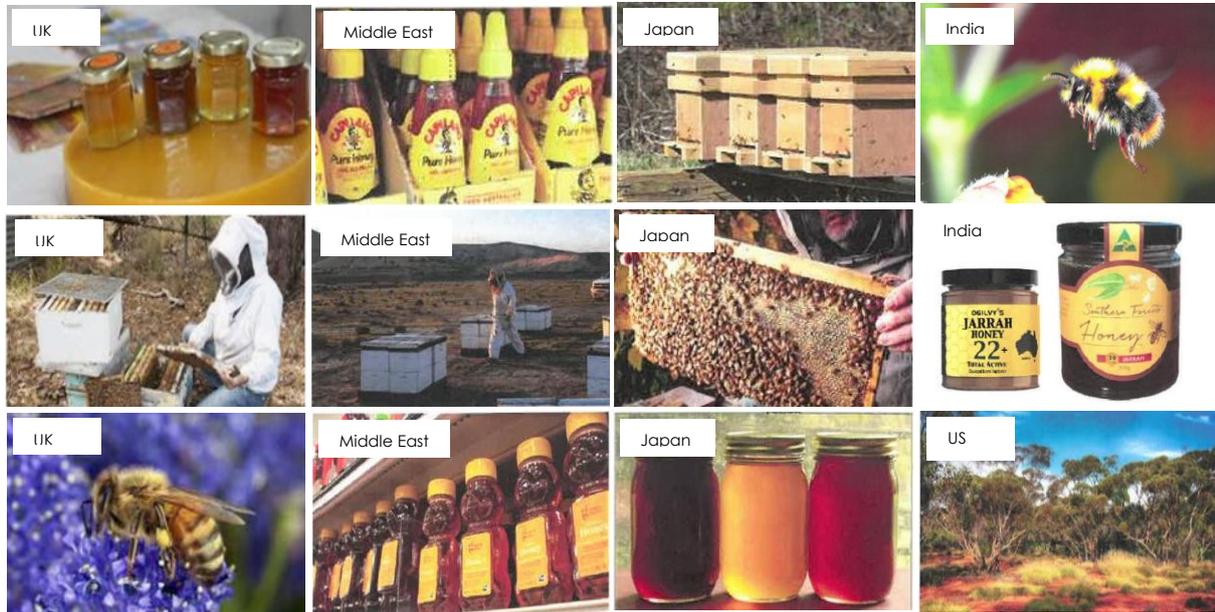
### Awareness of WA honey

Consumers stated that prior to arriving in WA, they had no awareness that Western Australia is a state and did not differentiate it from the rest of the country. Many had not heard of WA honey and therefore would not look it up online or try to find out more information on it. While Malaysia participants indicated they were very familiar with Australian honey and felt that it was marketed well in their country, none were aware of WA honey specifically.

### Consumers' awareness of honey from Australia and Western Australia while residing in their home country

|             | Australia    |             | WA          |             |
|-------------|--------------|-------------|-------------|-------------|
| Malaysia    | Low —●— High | Low ●— High | Low ●— High | Low ●— High |
| India       | Low ●— High  | Low ●— High | Low ●— High | Low ●— High |
| Japan       | Low ●— High  | Low ●— High | Low ●— High | Low ●— High |
| Middle East | Low ●— High  | Low ●— High | Low ●— High | Low ●— High |
| US          | Low ●— High  | Low ●— High | Low ●— High | Low ●— High |
| UK          | Low ●— High  | Low ●— High | Low ●— High | Low ●— High |

Each participant created a collage of what they associate with WA honey (see images to the right for a typical collage from each country). **The brands shown only reflect the style of packaging – squeezable bottles – or a type of honey – Jarrah** and do not represent preferences or actual purchasing behaviour. Collages included **packaged honey, the natural environment and production**. Colours were consistently dark, stressing the darker tones of WA honey and the browns and greys of the local landscape.



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### Imagery preferences for advertising

Participants noted several different images that they felt would get the most engagement from consumers in their home countries. The four most consistently suggested imagery styles were **native flowers, beekeepers with bees, honey production processes and the WA landscape**. Additionally, Indian and Middle Eastern consumers stated they would like images that showcased the **health benefits**. Indian and Japanese consumers also sought images of honey in packaging, with Japanese consumers especially interested if it was kawaii (cute).

### Consumer narrative preferences

The key attributes that consumers felt influenced their honey purchasing behaviour are shown in the table below (these are not ranked in order of their importance but reflect influential factors specified by participants. The **'organic, pure'** narrative emphasises that **honey is unadulterated and does not contain additives** (Malaysia, India, Middle East) and that honey is organic and does not contain pesticides (US, Middle East). Participants also **noted the importance of using health narratives** that showed explicit evidence for clinical outcomes and explained to consumers how bioactivity is measured.



*^ four dominant imagery preferences as stated by focus group participants (images as examples)*

| Key factors >                                     | Middle East | India | UK | Japan | US | Malaysia |
|---|-------------|-------|----|-------|----|----------|
| that influence purchasing behaviour for consumers |             |       |    |       |    |          |
| Organic, Pure                                     | ✓           | ✓     |    |       | ✓  | ✓        |
| Evidence based health narrative                   | ✓           |       |    | ✓     |    | ✓        |
| Ethically produced                                |             | ✓     | ✓  |       |    | ✓        |
| Locally sourced, flora                            |             | ✓     |    | ✓     |    | ✓        |
| Tips for usage                                    |             | ✓     | ✓  | ✓     |    |          |
| More attributes of WA                             |             |       |    | ✓     | ✓  |          |
| Variety of flavours                               |             |       |    |       |    | ✓        |
| Skin care use                                     | ✓           |       |    |       |    |          |

**All participants agreed that the most effective honey marketing strategy would be sharing short videos and still images on social media while having options for longer content, such as blogs or news articles, through links and QR codes.**

## Perceptions of premium honey

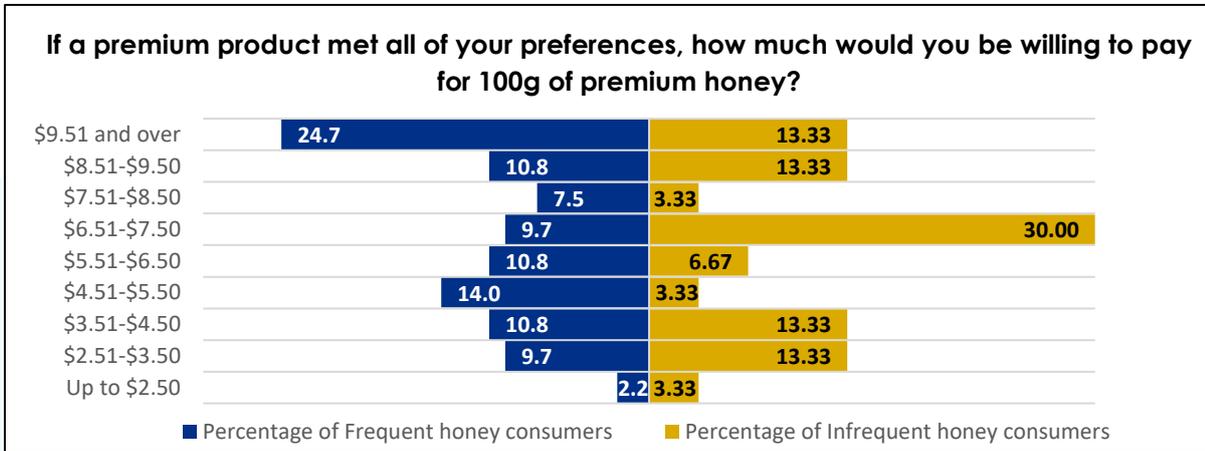
### Step 4. September – October

In addition to completing focus groups with foreign nationals from our target countries, we also conducted a **small preliminary survey** (n=123) with international students (n=55), domestic students (n=17) and non-students (n=51) to test our survey design and identify issues to explore further. 73% of participants were 18-35 years old with, 76% consuming honey frequently (at least once every 1-3 months) and 24% were infrequent consumers (once every 4-12 months). Our results showed that 63% of frequent consumers expect to buy 'premium' honey in the next 6 months and only 27% of infrequent consumers reported the same inclination. **The top two attributes that frequent consumers believe distinguish premium high quality honey from a standard offering were 'health benefits' and 'ratings by certified organisations', while infrequent consumers associate premium honey with 'flavours (different tasting notes', and 'ratings by certified organisations'.**

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### Perception of pricing

Although there was a fairly variable response for how much consumers were willing to pay for premium honey, **24.7% of frequent consumers were prepared to pay over \$9.50/100g** whereas 30% of infrequent consumers would only be willing to spend up to \$7.50/100g.



### What's Next?

In the next phase of our research we will develop content mock-ups featuring our identified narratives. Then using a panel of 450 consumers living in each target country we will conduct an experiment to **determine which narrative inspires consumers to pay the highest price for WA honey**. Through these experiments we will also be able to confirm our preliminary findings and establish what factors are most important to consider for each country when developing social media content that promotes WA honey. This may include perceptions of the state, the importance of honey to them as a product, their confidence in foreign products etc.

Finally, we will create social media content based upon the insights from the experiment and complete a three month testing phase using the content styles and platforms identified by our market testing (see page 3). We plan to execute our campaign combining an Instagram profile with a website blog. **This final phase will provide quantitative metrics into how much engagement and growth the campaign receives from the proposed marketing strategy to build the WA brand identity.**

### Chosen narratives for testing phase

**Flavour**

We will provide detailed Information about the CRC research into TA and provide evidence-based health narratives so consumers know the benefits of WA honey

We will showcase the variety of flavours that WA honey offers, as well as providing recipes and tips for them to try so they feel confident to use honey more often.

**Terroir**

We will reassure buyers that WA honey is thoughtfully, ethically and sustainably produced with 'behind the scenes' content of the production process

**Health**

We will focus on the deep connection between the WA landscape, plants and beekeeping community in producing the quality and variety of honey that we have in Western Australia

**Production**

**If you have any feedback for us or any questions, please don't hesitate to contact me at [Kim.feddema@research.uwa.edu.au](mailto:Kim.feddema@research.uwa.edu.au)**