Sugar what does it mean today

October 2016
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Background and methodology
Sugar is constantly in the media.
Sugar tax is happening
Education programmes becoming more prevalent

#Sugarsmartcity
As our gym instructors, slimming clubs and doctors
What use to be a simple love
Has now become complicated!

hidden sugars type 2 diabetes obesity addiction sweeteners low sugar reduced sugar no added sugar zero sugar
Background and methodology

**Semiotic review & desk research**

- Decoding sugar
- Delicious
- Sweet
- Tasty
- Energy
- Candy
- Sublime
- Decadent

**‘Expert’ depths**

- Nutritionist
- Blogger
- Dentist

Research partner:
Consumer research

**Skype depths**
6x 45min interviews with consumers highly involved in health

**In-home depths**
4x 2hr shop-a-longs and in-home interviews

**Group sessions**
11x 1.5hr mini-groups (4-5) & pre-task

See appendices for further details of groups
Background & methodology

Consumer qualitative fieldwork took place between June & July 2016

Research partner:
What do the experts say
Meet our experts

- 3x 1hr telephone interviews
- Conducted between June-July, 2016

Charlotte Stirling
Reed

Lucy McDonald:
Crumbs

Trevor Sher
Hertfordshire
Experts identify 2 issues

1. Hidden sugars – consumers unknowingly eating poorly
2. Poor diet – consumers over-consuming known sugars
The experts say this is a topic shrouded in mystery and inaccuracies identifying two key issues:

“Hidden sugars”: the unknown consumption

Poor diet: consumers “over consuming” the known.

**What they say..**

**Nutritionist**
- It’s necessary
- Misunderstood (natural, added)
- A scapegoat for a broader lifestyle

**Blogger**
- Not bad but too much out there
- It’s demonized
- Feels the emphasis should be on “added sugar”

**Dentist**
- Not bad but in moderation
- Too much emphasis on pack
- A socio economic divide
Key challenges surrounding sugar

- Consumer Confusion
- Misinformation
- Educational Hurdles
- Sugar as a crutch
Consumer confusion – driving inactivity

1. The different types of sugars: The role and benefit of each
2. Responsible sugar consumption: How much sugar is the ‘right’ amount in the course of a day?
3. Hidden sugars: More omnipresent than consumers think
4. On pack messaging: Disconnect between look & feel, messaging and product formulation
5. Labeling: Too hard / I don’t understand?

There is a sense that whilst consumers are aware of issues around sugar, an overload in information is resulting many to stick their head in the sand
Misinformation – adding to confusion

• Television shows
  • Great British Bake Off ‘sugar free’ promoting the use of honey and syrup
• Lifestyle bloggers promoting rigid diets and food neuroses
  • The likes of Deliciously Ella and Hemsely & Hemsely considered bad yet very influential role models in urban centers
• Incorrect marketing messages taken as law – eg needing sugar to get through a slump in the day

People are looking to brands and the media for guidance - but it has let them down
Educational hurdles – still unclear how to make it stick

• Parents unclear how to address sugar, without making it a weight issue (especially amongst girls)
• Government studies feel laborious and inaccessible to the general public
• Cooking from scratch seen as part of the solution...but a new / terribly expensive concept for those in lower socio-economic groups
• School’s, not necessarily walking the walk
  • Some sense they are more focused on a cost efficient supply change rather than seeking ethical solutions to food issues

Finding a way to educate the public that is accessible and effective is one of the greatest challenges
Sugar as a crutch – avoidance of lifestyle issues

• ‘Sugar’ being used as:
  • Solution for stress
  • A giver of comfort
  • A deserved source of pleasure
  • ‘Quick fix’

Sugar is a small part of modern lifestyle issues. People are often looking for the easy way out / short-cuts to a better life, rather than taking responsibility of their lives, implementing self control and generally leading a more balanced life.
Key influences to consumers’ understanding of sugar
Socio economics plays a role

Understanding the households dynamics

In households where cooking from scratch is more the norm, the relationship with sugar tends to be more balanced.
Awareness and attitudes are different by location

- **Belfast**
  - Health lowest on the radar

- **Dublin**
  - Current high media presence making sugar slightly more top of mind subject vs Leeds, Edinburgh, Belfast

- **Leeds, Edinburgh, Belfast**
  - Similar attitudes, behaviours and reference points

- **London**
  - Most health aware
  - More health conscious
  - More likely to be influenced by health trends
There are differences through the generations..

**Under 30s**
- Like natural sugars
- Aware of hidden sugars
- Nutrition focused

**35 plus**
- Artificial sweeteners
- Embrace “Slimming world” etiquette

**55 plus**
- Different attitudes to health and sugar
- Less knowledge on hidden sugar
And the age relationship is different too
Idyllic – positive implications when we’re young

Teens – gets more complicated (hormones, weight concerns)

Comfortable stage – cohabiting & influencing each other

And the age relationship is different too

Fear when we become parents – want to do right by young kids but life gets busy

Polarising as we age – some change behaviour due to health scares and others feel it’s too late
Consumer challenges
Rationally, consumers feel they have a good grasp on the effects and benefits of sugar
Rationally, consumers feel they have a good grasp on the effects and benefits of sugar.
Words used to describe sugar heaven

sugar sweet natural delicious indulgent rich divine scrumptious nectar satisfying yummy tasty mouth watering pleasure rush energy deserving luscious sweetened candy ambrosial desire confectionary decadent treat sublime
Words used to describe sugar hell

sickly unhealthy poison
dental problems diabetes
poor nutritional value artificial
processed hidden overweight cancerous hyperactivity killer
health issues saccharine obesity deadly decay
However they are confused about sugar consumption.
It is a topic that causes a lot of angst

1. Hidden sugars

2. On-pack language

3. Lack of education

4. Sugar as the ‘go to’
1. Hidden sugars primary source of frustration

**PRODUCT PACKAGING & MESSAGING**

Packaging sends a message of goodness, everyday consumption, ‘better for you, even healthy

**PRODUCT FORMULATION**

Product formulation suggests the contrary i.e. high levels of sugar
Hidden sugars

Consumers feel this is a blatant deception leaves them feeling betrayed by manufacturers and powerless to make any changes for the better to their lives
Products that communicate “perceived” *good for you* messaging are perceived as betrayers
We’ve been fooled by orange juice – it’s just full of sugar”.
(London, 20-30, pre-kids)

My son had lots of fillings…dentist asked what was he drinking and I said fruit smoothies. I didn't give him any sweets or anything...Didn't even know there was sugar in them.
(Edinburgh, 35-54 with kids)
People feel less betrayal from categories that are understood (and liked) for having lots of sugar!
2. Lack of clarity—consumers highlight varying degrees of confusion in terms of packaging signposts

Meaningless

Some understanding
In fact it’s a world of complete confusion!
Sugars frequently found within product labels

- sugar
- sucrose
- glucose
- sugar solution
- sugar syrup
- fructose
- fruit sugar
- honey
- golden syrup
- treacle
- raw sugar

- corn syrup
- high fructose corn syrup
- lactose
- maltose
- starch hydrolysates
- agave syrup
- agave nectar
- fructose syrup
- glucose syrup
- brown rice syrup
- coconut sugar

- palm sugar
- date sugar
- cane syrup
- dextrin
- dextrose
- aspartame
- saccharin
- sucralose
- Stevia
- sorbitol
- xylitol
Terminology used on product packaging

total sugars
sugar (as carbohydrate)
free sugars
total available sugars
added sugars
refined sugars
sweeteners
naturally occurring sugar
natural sugar

reduced sugar
low sugar
less sugar
sugar free
no added sugar
low calorie
zero sugar
Less sugar ‘must be healthier for me’
Reduced sugar ‘lower than the regular version’
Low sugar ‘I want to lower my sugar intake’
No added sugar ‘contains just natural
Sugar free ‘I want to cut out sugar completely’
zero sugar ‘as low as it gets’
<table>
<thead>
<tr>
<th>Reduced sugar</th>
<th>50% less</th>
<th>No added sugar</th>
<th>Zero / sugar free</th>
<th>Low sugar</th>
</tr>
</thead>
<tbody>
<tr>
<td>“They have reduced the sugar a little bit but not quantified the reduction so not sure how much less sugar in it. Might only be 0.5%.”</td>
<td>“There would still be a lot of sugar in there – you don’t know where the start point is.”</td>
<td>“Not saying anything reduced, but won’t have more on top…Still could be quite a lot of sugar.”</td>
<td>“Says no sugar in theory, but again will it have something else in there instead.”</td>
<td>&quot;You have to take that on trust, but should not have much sugar in it.”</td>
</tr>
</tbody>
</table>

There is increasing backlash against the use of artificial sweeteners, with consumers preferring (to an extent) to consume items low in natural sugar.
2. Current on pack language

It’s really difficult to understand what is what, it’s eeny meeny mo really. (Belfast 35-54, with kids)

There is increasing backlash against the use of artificial sweeteners, with consumers preferring (to an extent) to consume items low in natural sugar.
Consumers can use pack design and communications to guide their decision making.

Low sugar (blues & natural colours) High sugar (primary colours)

Colours are very important
3. Lack of education

- Most education on healthy eating comes from the home
- Amongst less affluent consumers, the foundation just isn’t there, resulting in many:
  - Eating far worse than they ever imagined
  - Not knowing where to start on their health journey – so give up before they begin
  - Making poor choices, see no results, get frustrated and give up!
  - Being educated by their children

These days my son is telling me to look more closely at the label – children know a lot more and are telling us things now (Belfast, with kids, 35-54)

Less affluent consumers require the greatest support to improve their health. They are totally in the dark as to what a balanced diet involves.
4. Sugar as a crutch – the daily ‘go-to’

THEN

Often rationed → Special, a treat

Once a week treat treat
We used to love a bowl of ice-cream, you’d take a bowl to the ice cream man and then all share it, get your spoon in until it was gone – it was really special, only once a week so really special. (Belfast, 35-54, with kids)

NOW

Necessary part of → A remedy a daily diet

Energy vs sugar crash
It’s really hard when you’ve got kids. You’re so tired, you just give into your sugar cravings...but then after a bit you just crash. (London, 35-54, with kids)

Sugar has shifted from ‘treat’ to ‘solution’ (for many) – especially when it comes to a much needed energy or mood boost. In line with this, the consumption moment moving away from a limited, highly anticipated moment of pleasure to a regular, needed ‘fix’.
Consumer needs
Introduction to sugar NeedMap™

- Consumers’ sugar needs refers to the sugar they are aware of – those in ‘sweet’ foods
- These are formed throughout life but are heavily influenced by childhood and adolescence
More Extroverted, Higher Energy

More Introverted, Lower Energy

More Self Orientated

More Others Orientated

simple pleasure

sugar needmap™
Sugar needmap™
Sugar was insignificant as a child – we didn’t get sweets, crisps, bars of stuff, fizzy juice, we had 3 meals a day and maybe crisps or fruit pastilles on a Saturday to split between 3 of us. (Leeds, 35-54, with kids)

Cousins sleep overs every week and buying sweets for the sleep over was all part of it. (Belfast 35-54 with kids)

The ginger man in Glasgow...a ritual. You knew which day they would come...every Tuesday. (Edinburgh 35-54 with kids)

Saturday night’s were our weekly treat. We sat down in front of TV with mum, crisps, chocolate, soft drink – settle in. (Dublin 35-54 with kids)
Impulse – satisfying a craving

Occasion: 11sies, 3pm, return from work, 9pm

Emotional benefit: Satisfaction, boredom, relief, pick me up

Product category: Confectionary, alcohol, take-away, juices, soft drink

Example brands: Coke, Mars Bar, Kit Kat

If I walk into a petrol station I just can’t not buy something! The red of a wrapper just catches my eye. (Dublin, pre-kids, 20-30)
Feel good – natural energy

Occasion: Outdoor, on the go, after sport, breakfast

Emotional benefit: Natural ingredients, wholesome, guilt free

Product category: Cereal, muesli bars, home-baking, yoghurt, fruit

Example brands: Belvita, All Natural bars, Nature Valley
Sociability – better together

Occasions: Friday/ weekend nights, when friends come to visit, birthdays, celebrations

Context: Sharing (with family/ friends/ co-workers) alleviates guilt

Emotional benefit: Belonging, warmth, shared pleasure

Product category: Confectionary, biscuits, cakes, alcohol, take-aways

Example brands: Maltesers, Heroes, Celebrations
Nurture – wholesome goodness

Context: Food from scratch, good parenting

Emotional benefit: Good parenting, building traditions, creating memories, giving pleasure, control (know how much sugar in there)

Product category: Home baking, yoghurts, baby food

Example brands: Ellas, Hipp Organic, Mr Kipling, Betty Crocker
Control – weight management

**Context:** Proactive desire to improve health

**Emotional benefit:** Pride, self esteem

**Product category:** Anything reduced sugar, sugar free, zero sugar, no added sugar

**Brands:** Diet Coke, Mueller Light, Slimming World
Reward – **pat on the back**

**Context:** Ritualised event, ‘got through the day’ treat

**Emotional benefit:** feel good factor, pleasure

**Product category:** Confectionary, alcohol, takeaways

**Example brands:** Haribos, Dairy Milk
Indulgence – me and the moment

Context: Creating a moment of relaxation

Emotional benefit: Enjoyment, ‘me-time’

Product category: Ice cream, chocolate, take-away, alcohol

Example brands: Haagen-Dazs, Green & Blacks, Gu
Performance – the best you can be

Context: Needing a physical and or mental boost

Emotional benefit: A ‘better me’, ‘on form’

Product categories: Energy drinks, energy bars

Occasions: Before a meeting, whilst playing sport / after sport

Example brands: Red Bull, Lucozade, Trek bars, Bounce balls
Meet the various sugar personas
Consumers today – a broad spectrum

- Engaged and on trend
- Back to basics
- Reactors
- Purposeful parents
- All too harders
Consumers today – a broad spectrum

ENGAGED AND ON TREND
- Very focused on health & trends - core topic of conversation amongst friends
- Enjoy cooking
- Internet – frequent source of inspiration for recipes and diets

BACK TO BASICS
- Believe in a little bit of everything
- Upbringing key reference point to health
- Often cook from scratch
- Prefer natural sugar to sweeteners

PURPOSEFUL PARENTS
- Children inspire better household habits
- Struggle between
  - Convenience/cost and health
  - Appeasement (of children) vs nutrition

REACTORS
- Behavioural change inspired by health fears/scare
  - Often losing weight and age a key driver
- Initial tendency to look for short-cuts before making real change

ALL TO HARDERS
- Aware they do not have healthy behaviours but significant changes considered to hard, expensive, inconvenient and not pleasurable!
Gemma – engaged and on trend

Gemma has her finger on the pulse when it comes to health. Whether flicking through a magazine or when online, she can’t help but stop and read about the newest health trends. It is a frequent topic amongst her friends and she’s always willing to try something new to look and feel her best. She follows a few people on Instagram, to get cooking...and life inspiration. They are always going to the coolest places! Sugar is not a complete no no, but she certainly tries not to eat it everyday. When she does, she gravitates towards the natural stuff like fruit. She also us a keen baker, making treats for friends and family at least once a month, but even here, she tends to replace refined sugars for alternatives such as brown sugar, honey or agave syrup.
David – back to basics

David remembers his childhood well. Coming home from school to the smell of dinner bubbling away on the stove, ice-creams on a Sunday after a family outing – just a balance of good, honest, wholesome food.

After going a bit off piste when he left home...drinking and kebabs at uni, pizza and softdrinks over the weekend when he was flatting, he got to 40 and just started feeling a bit crap. His energy levels were low, he was feeling bloated and since stopping his twice weekly football training, when the kids came, the weight really started to pile on. Rather than any dramatic changes, he just decided to go back to what he knew – simple, wholesome foods...with just a little bit of what you fancy.
Claire – purposeful parents

Claire remembers sugar being a huge part of her childhood. Sweets from grandma, fizzy drinks always in the fridge...her sister even went to bed with a bottle by her bed! But with her baby weight hanging around and the discovery her son already has three cavities, she realised something had to change. Having tried (and failed) every diet under the sun, she recently signed up to Slimming World, to learn what healthy eating is all about. Small changes, like sweetener in her tea rather than sugar and treating herself to Mueller Light (no sins!), she’s slimmer and has more energy. But it isn’t easy. Hearing her son complain that dinner’s just aren’t as tasty any more is hard, and all the fresh fruit and veg she’s now buying does giver her wallet a pounding.
Bill – a reactor

Bill has never really paid to much attention to his health, though with diabetes in his family, on both sides, he probably should have! Three teaspoons of sugar in his tea was the norm, alongside a Rich Tea biscuit, plus a little dessert after tea most nights. However between all the media chat about the rise in type 2 diabetes, reaching the big 6-0, and with a little more time up his sleeve (now the kids have left home) he’s decided to focus on himself and make some small changes to improve his health. Only one sugar in his tea, takeaway only once a week and a new found love of cooking has made all the difference.
Tim & Pete – it’s all too hard...

At home, it is just Tim and his dad. Two guys who enjoy a curry and beer on a Friday, pizza most Sundays and have a fridge full of ready meals in-between. For Tim, life is busy, between work and going out with his mates, the last thing he feels like doing when he gets home from work is cooking. Whilst for his dad – it’s just habit...you can’t teach old dog new tricks! The idea of getting rid of the biscuit tin, or the chocolate stash fills him with sadness...and horror!
The way forward
The way forward

Consumers are looking to rebalance the scales. This does not mean completely excluding sugar, but rather empowering consumers to eating it in a more controlled and enjoyable fashion.
What does that mean?

From
- Back of pack sugar
- Unregulated
- Unknown consumption
- Fear mongering
- Percentages

To
- Front of pack
- Clear cues
- Mindful ritual
- Education
- Colour codes

CONFUSION

EMPOWERMENT
Known to have higher levels of sugar

Confectionary
Soft drinks
Ice-cream

Categories of interest

Cereals
Yoghurt
Sauces
Juice
Jam’s / preserves

Natural sugars permissible

Added sugar permissible

Products that are savoury, ‘natural’ or communicate ‘good for you’ are expected to only have low level, naturally occurring sugars.

Products that are sweet are expected to have sugar, are known to be eaten in moderation and therefore do not require any special treatment of sugar on pack.
When is sugar permissible….

Low sugar permissible

- Naturally occurring – the best type of sugar
  - Naturally sweet
  - Naturally occurring
  - Sweetness comes from natural fruit
  - Fructose

Higher sugar permissible

Giving context to consumption eg suitable:
- As part of a balanced diet
- Once a weak
- As a special treat
- When you want a little of the good stuff
- After / during some activity
What does this mean for your brand?

Need
Context
Packaging
Messaging
Sugar vocab
Sugar treatment **differs by need**

<table>
<thead>
<tr>
<th>No special treatment required</th>
<th>Treatment required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Impulse</td>
<td>Feel good</td>
</tr>
<tr>
<td>Sociability</td>
<td>Nurture</td>
</tr>
<tr>
<td>Reward</td>
<td>Control</td>
</tr>
<tr>
<td>Indulgence</td>
<td>Performance</td>
</tr>
</tbody>
</table>
Performance – the best you can be

Context: High level activity – physical or mental boost
Packaging: Energy, performance
Product messaging: Take you to the next level, a better you / the best you

Sugar vocab:
Context specific – specific treatment required
Feel good – natural energy

Context: In moderation - part of a balanced diet

Packaging: Natural colours, ingredients

Messaging: Ingredient story, provenance

Sugar vocab:

Naturally occurring sugars, fructose /
from fruit, simple ingredients
Control – weight management

Context: At home, teaching / learning, pre-planned family time
Packaging: Natural colours, ingredients
Messaging: Authority, authenticity, made from scratch

Sugar vocab:
Natural sugars, controlled amount
Control – weight management

Context: Active desire to cut sugar consumption

Packaging: Pale colours

Messaging: Simple - less of the bad stuff

Sugar vocab: ‘low’, ‘less’, ‘reduced’ to be standardised across the industry
3 pillars identified to meet consumer needs

Manufacturer transparency
To guide and support their decision to lead a healthier life

Education
To understand what the right choices are

Communication
Creating a meaningful role for sugar in the lives of consumers
Keep it simple, transparent & honest...
Appendices

1. The Experts
Charlotte is one of the UK’s leading nutritionists with a wealth of experience working with the NHS, commercial companies, local authorities and charities.

She has a first class degree in Nutrition and Human Biology and a Postgraduate Degree from Bristol University in Nutrition and Public Health. Her specialist areas are Infant and Child Nutrition, Nutrition Communications, Weight Loss and the Media.

Charlotte regularly writes for the media and recently featured as an expert on Channel 4’s ‘Food Unwrapped’, and 5 Live news. Charlotte has also been asked to join discussions on the radio, most recently on LBC’s Breakfast show discussing the changes to school meals.

She is experienced with working with brands and has worked with some of the UK’s biggest brand names including: Arla, Whole Earth, Quaker, Superdrug, British Hospitality Association. Brand work with Charlotte encompasses a wide ranges of nutritional services including, but not exclusive to – new product development, press and media events, product launches and campaigns, copywriting and recipe analysis.

More background information can be found on Charlotte's website: [www.srnutrition.co.uk](http://www.srnutrition.co.uk)
We are two sisters with two husbands and four children between us, aged between five years and 22 months. We live in opposite corners of London, but wished we lived next door to each other. Well most days.

We are not cooks, just women who like to eat. Claire likes fish, liver and oysters. Lucy likes tacos, roast chicken and coconut macaroons. We both like chocolate. And red wine. We want our children to love food too, but having said that, we also want a life. We both work, have friends and like gazing into the mid-distance doing nothing. This limits the amount of time we have to make our own pastry, peel potatoes or even, if we’re honest, grate cheese.

Lucy – I’m the Queen of Ocado. If I dropped dead tomorrow, they would go bankrupt. Probably. But I buy meat, fish, cheese and seasonal fruit and veg from my local farmer’s market. I try to menu plan but often ruin it all by sneaking in a mid-week Thai takeaway. I have realised that the more organised I am, the better we all eat. That said, all the best laid plans of mice and men....
Trevor Sher (BDS) Dentist

Qualifying in South Africa in 1975 Trevor began practising in the UK in 1976. He is a very experienced dentist who has been in practice for 39 years in the UK. Happy to undertake most disciplines in dentistry however his special interest lies in Orthodontics. Married with 3 children and 3 grandchildren, he enjoys playing sport and attending the theatre as well as travelling.

The orthodontic treatments favoured include Cosmetic Aligner systems and Dr Sher is registered to treat patients using the Inman Aligner. Especially happy to treat children and nervous patients.

Undertaking a great deal of cosmetic dentistry including crowns, veneers, white fillings etc he has owned and run a number of successful dental surgeries over many years in the UK. Including accredited Investors In People surgery.
Appendices

2. Semiotics
Natural vs artificial – legitimising sugar

As with many spheres, natural is perceived as ‘good’ whilst manmade, processed or manufactured is ‘bad’. The fact that the body processes all sugar in the same way does not override these rich sets of associations.
Visual language of processed
Processed packaging

- Granulated
- Caster
- Icing
- Demarara
- Light brown
- Muscovado
Visual language of natural
Packaging of natural

Raw Sugar  Coconut Sugar  Honey  Agave Nectar  Maple Syrup
Sugar reduction

minor reduction

comprehensive reduction
Thought for food
For further information on this study please contact info@bordbia.ie or Tel: +353 (0)1 668 5155

DID YOU KNOW? You can also request professional library searches for market information from our team of qualified librarians at any time. Typical searches include requests for market information on – markets, categories, NPD, brands, companies, channels: retail, foodservice, trends and consumers .... Simply fill in our enquiry form or e-mail info@bordbia.ie. to request a professional library search and we will endeavour to get back to you, in a timely manner with relevant market information resources, adhering to copyright and licensing agreements.
Sugar what does it mean today

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