The Thinking House

BORD BIA INSIGHT CENTRE

Sugar what does it mean today

October 2016

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Background and methodology

Sugar is constantly in the media





Diabetes risk in daily sugar drink

'SUGAR IS THE NEW TOBACCO'






SUGAR
CRASH
RTÉ ONE HD
RTÉ.ie
SAMSUNG

Sugar tax is happening



Education programmes becoming more prevalent

#Sugarsmartcity



Dentists are key influencers



As our gym instructors, slimming clubs and doctors

Slimming WORLD

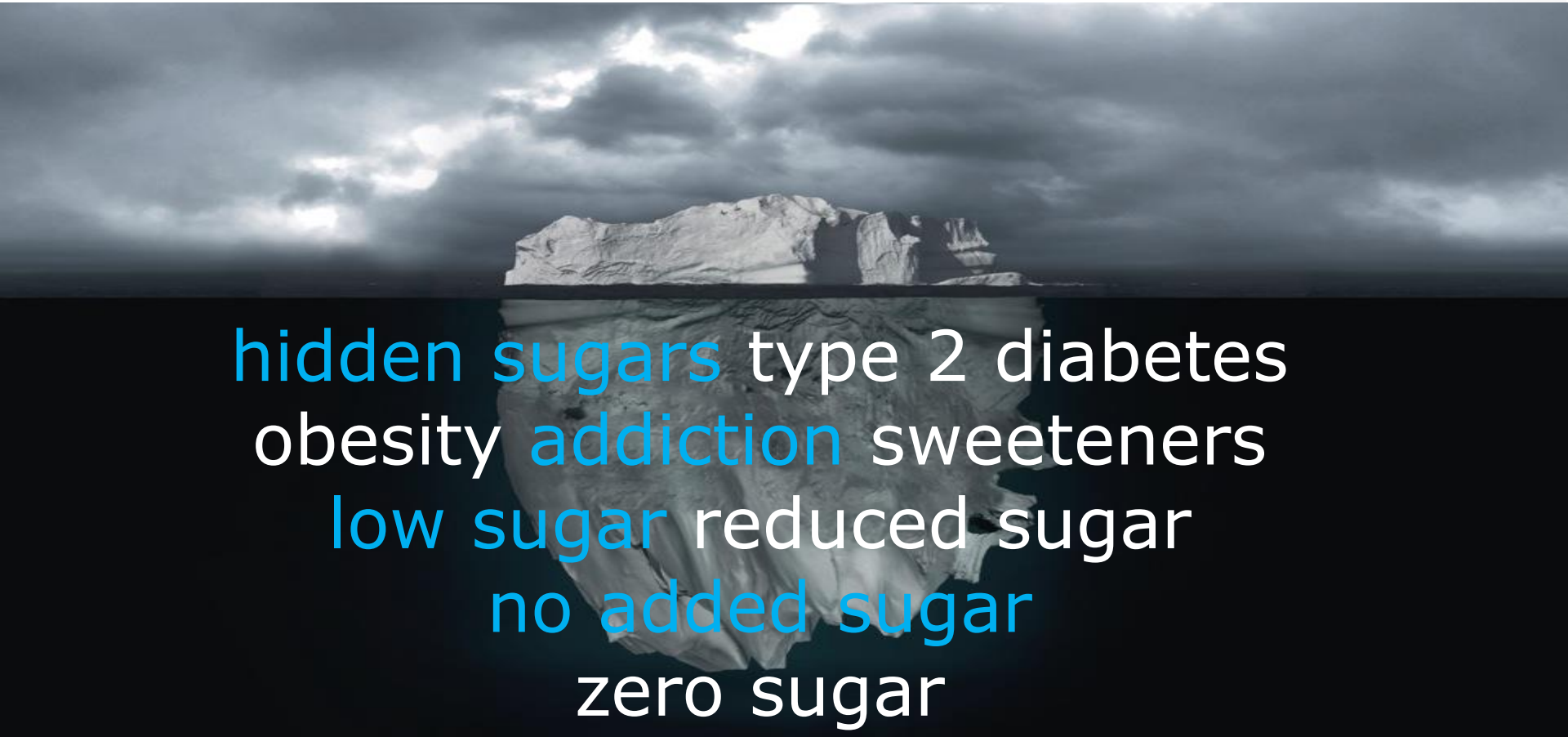
touching hearts, changing lives



What use to be a simple love



Has now become complicated!



Background and methodology

Semiotic review & desk research



'Expert' depths



Nutritionist

Blogger

Dentist

Research partner:

HAINESMcGREGOR CREATIVE INTELLIGENCE

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:

HAINESMcGREGOR } CREATIVE INTELLIGENCE

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What do the experts say

Meet our experts

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

NUTRITIONIST



Charlotte Stirling
Reed

BLOGGER



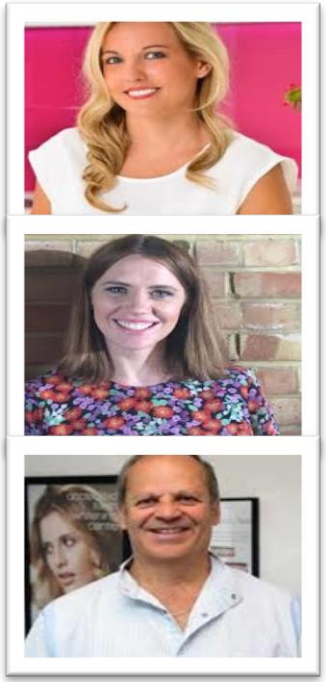
Lucy McDonald:
Crumbs

FAMILY DENTIST



Trevor Sher
Hertfordshire

Experts identify 2 issues



1. Hidden sugars – consumers unknowingly eating poorly
2. Poor diet – consumers over-consuming known sugars

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

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.

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

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Key influences to consumers' understanding of sugar

Socio economics plays a role

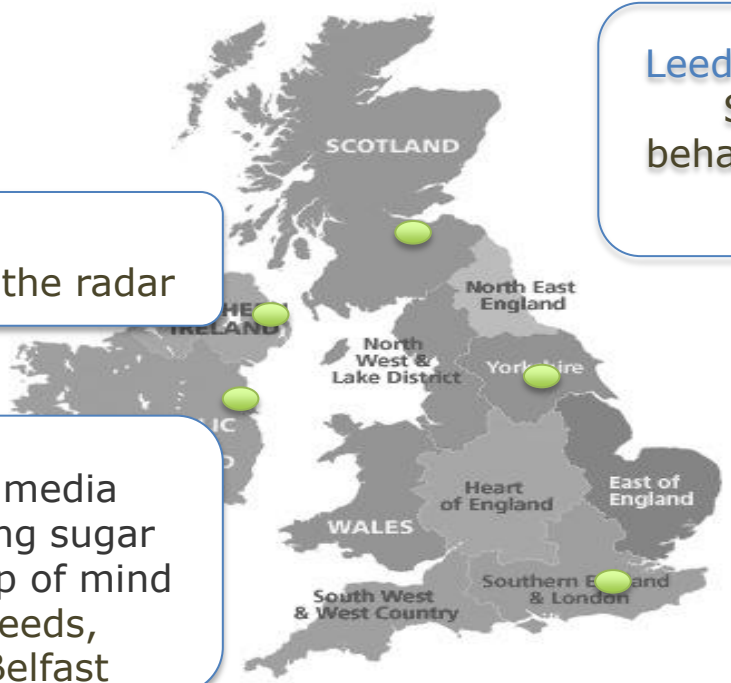
Understanding the households dynamics





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



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

Belfast
Health lowest on the radar

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

London
Most health aware
More health conscious
More likely to be influenced by health trends

There are differences through the generations..



Under 30s

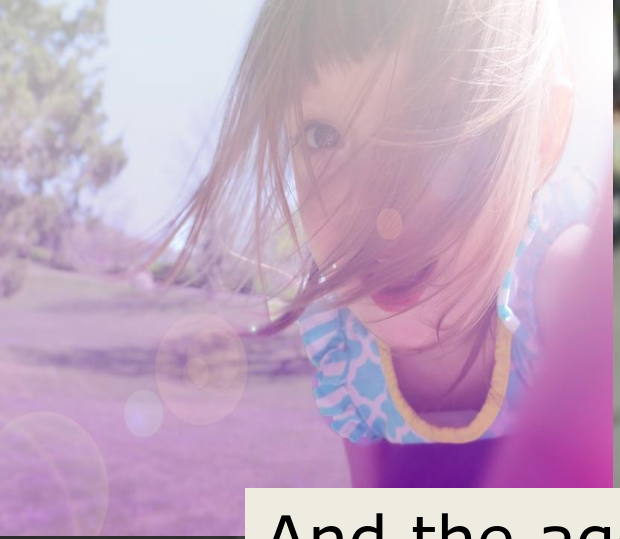
- Like natural sugars
- Aware of hidden sugars
- Nutrition focused

35 plus

- Artificial sweeteners
- Embrace "Slimming world" etiquette

55 plus

- Different attitudes to health and sugar
- Less knowledge on hidden sugar





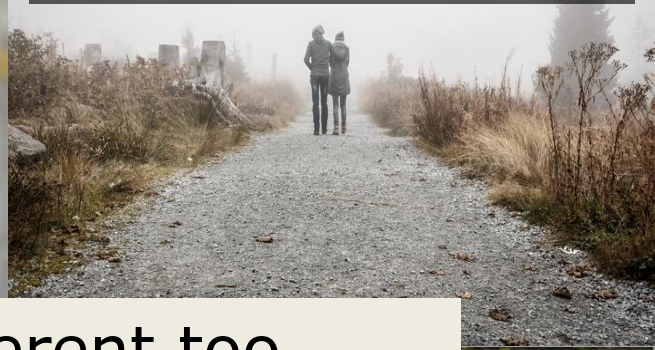
And the age relationship is different too




Idyllic – positive implicatations when we're young

Teens – get's more complicated (hormones, weight concerns)

Comfortable stage – cohabiting & influencing each other

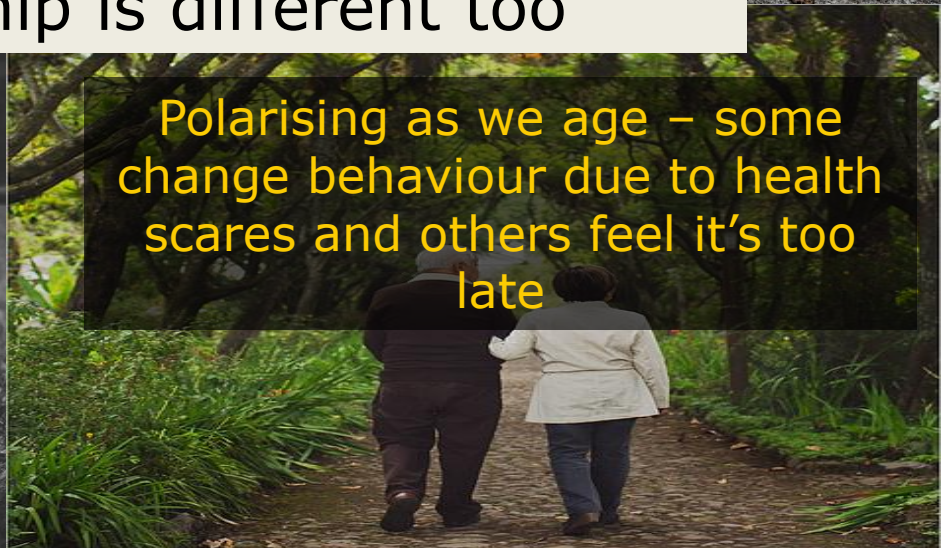


And the age relationship is different too

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





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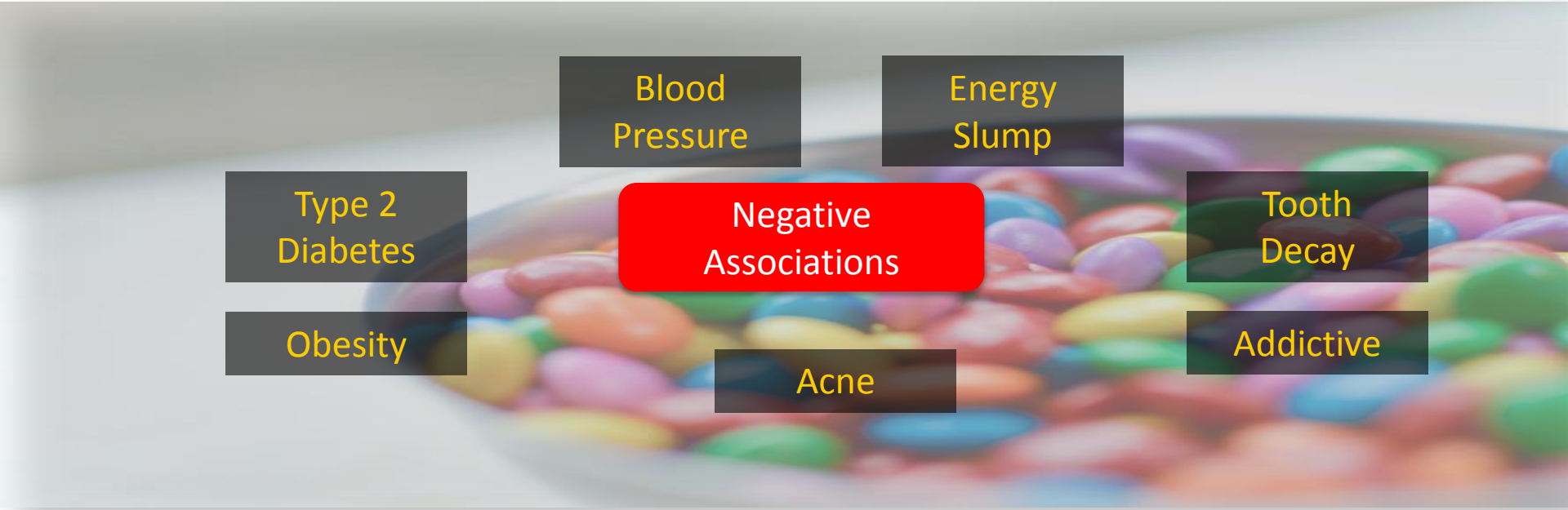
Consumer challenges

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

CONFLICTING MESSAGING	PACK LABELLING	HIDDEN SUGAR
		
CONFUSED	POWERLESS	BETRAYED

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	≠	PRODUCT FORMULATION
Packaging sends a message of goodness, everyday consumption, 'better for you, even healthy		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







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)

"We've been fooled by orange juice – it's just full of sugar".
(London, 20-30, pre-kids)



People feel less betrayal from categories that are understood (and liked) for having lots of sugar!



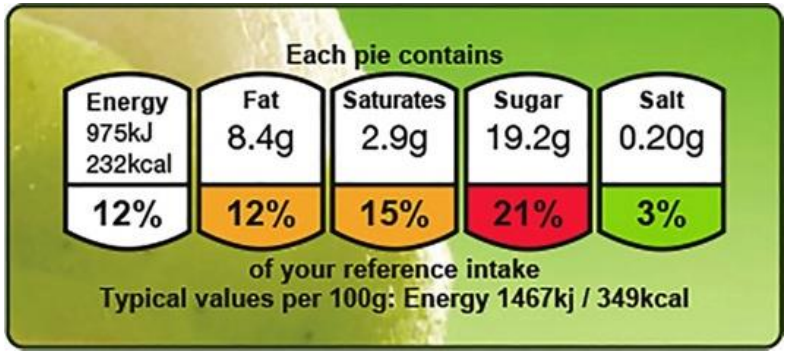


2. Lack of clarity– consumers highlight varying degrees of confusion in terms of packaging signposts

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’













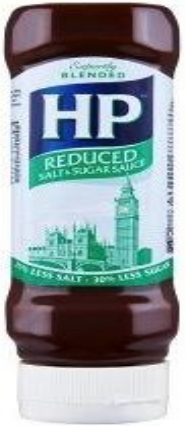




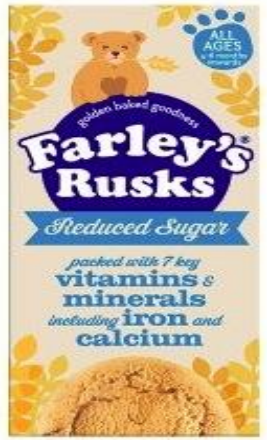
Reduced sugar ‘lower than the regular version’



















Low sugar ‘I want to lower my sugar intake’











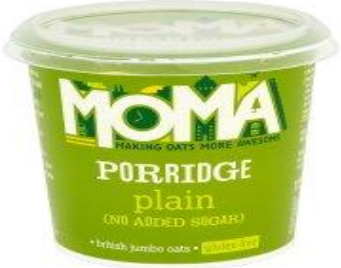




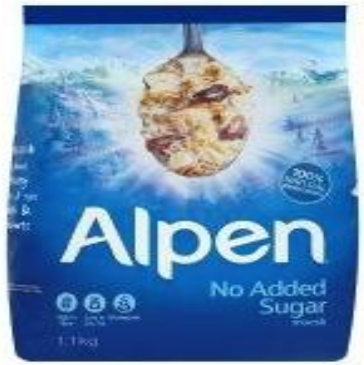
No added sugar ‘contains just natural





















Sugar free ‘I want to cut out sugar completely’









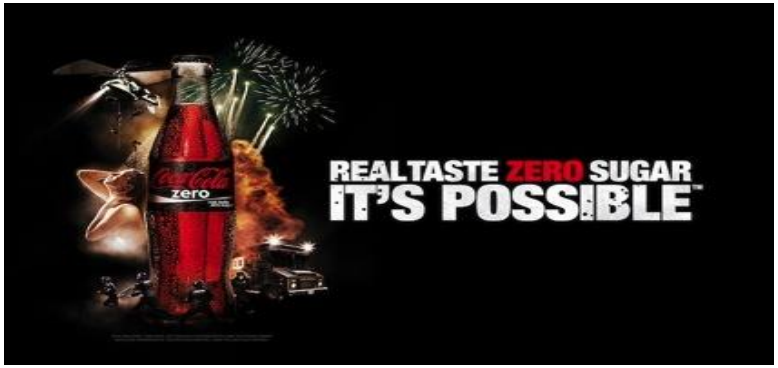








zero sugar ‘as low as it gets’











Current on pack language

Little understood → Somewhat understood

Reduced sugar
"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%."

50% less
"There would still be a lot of sugar in there – you don't know where the start point is."

No added sugar
"Not saying anything reduced, but won't have more on top…Still could be quite a lot of sugar."

Zero / sugar free
"Says no sugar in theory, but again will it have something else in there instead."

"Zero sugar means chemicals

Low sugar
"You have to take that on trust, but should not have much sugar in it."

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

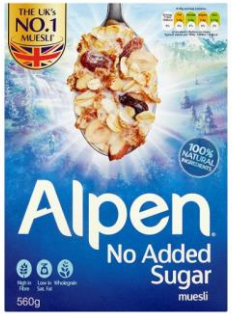
2. Current on pack language

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

instead…asparta me."

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

NOW

Necessary part of a daily diet → A remedy

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)

Energy vs sugar crash

Its 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’.

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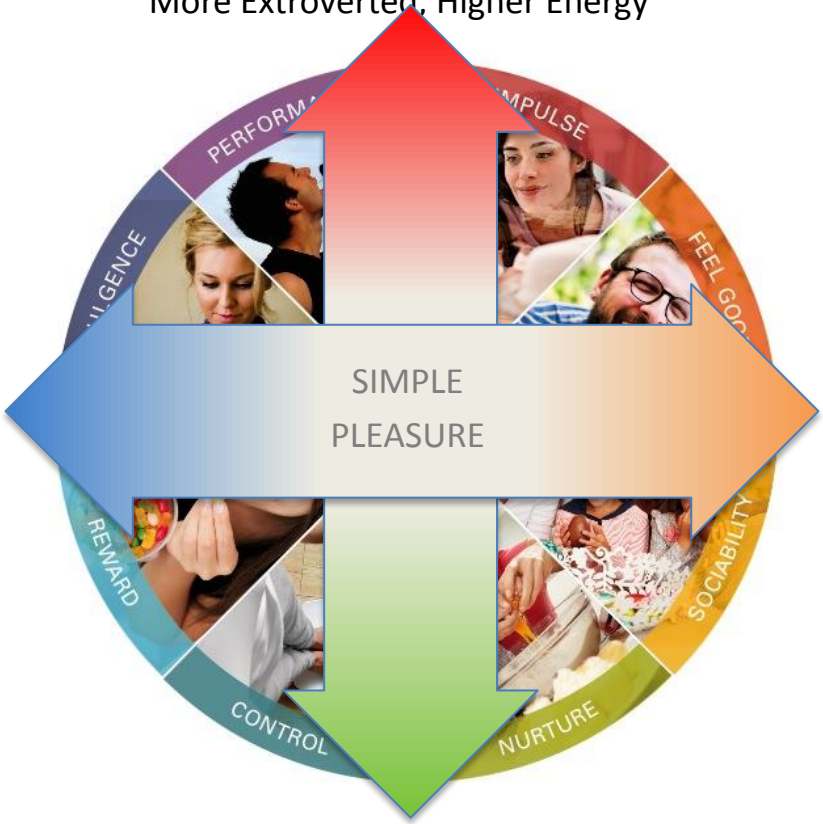
Consumer needs

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

sugar needmap™

More Extroverted, Higher Energy



More Self Orientated

More Others Orientated

More Introverted, Lower Energy

Sugar needmap™



sugar at its core - simple pleasure



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

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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	BACK TO BASICS	PURPOSEFUL PARENTS	REACTORS	ALL TO HARDERS

• Very focused on health & trends - core topic of conversation amongst friends
• Enjoy cooking
• Internet – frequent source of inspiration for recipes and diets
	• Believe in a little bit of everything
	• Upbringing key reference point to health
	• Often cook from scratch
	• Prefer natural sugar to sweeteners
		• Children inspire better household habits
		• Struggle between
		  • Convenience/ cost and health
		  • Appeasement (of children) vs nutrition
			• 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
				• 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 kid's 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!



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The way forward

The way forward



VS



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	To
Back of pack sugar	Front of pack
Unregulated	Clear cues
Unknown consumption	Mindful ritual
Fear mongering	Education
Percentages	Colour codes
CONFUSION	EMPOWERMENT

Categories of interest

Known to have higher levels of sugar

Cereals

Yoghurt

Sauces

Juice

Jam's / preserves

Confectionary

Soft drinks

Ice-cream



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

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

No special treatment required

Impulse

Sociability

Reward

Indulgence

Treatment required

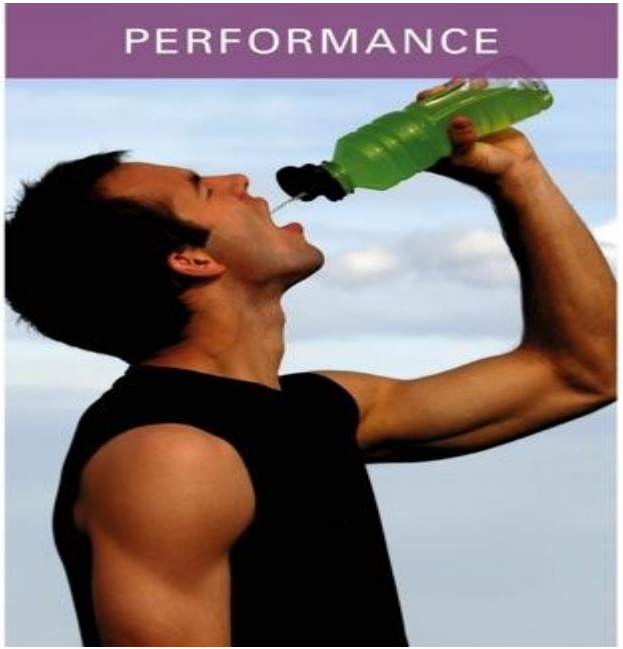
Feel good

Nurture

Control

Performance

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

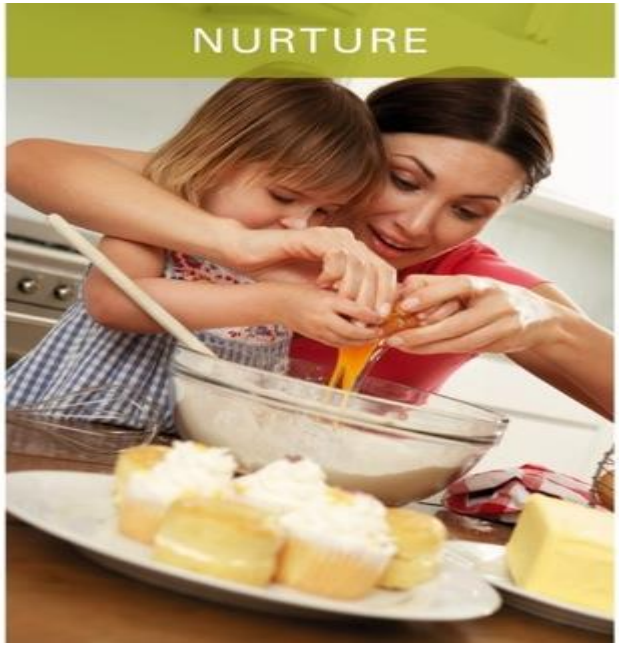
Packaging: Natural colours, ingredients

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

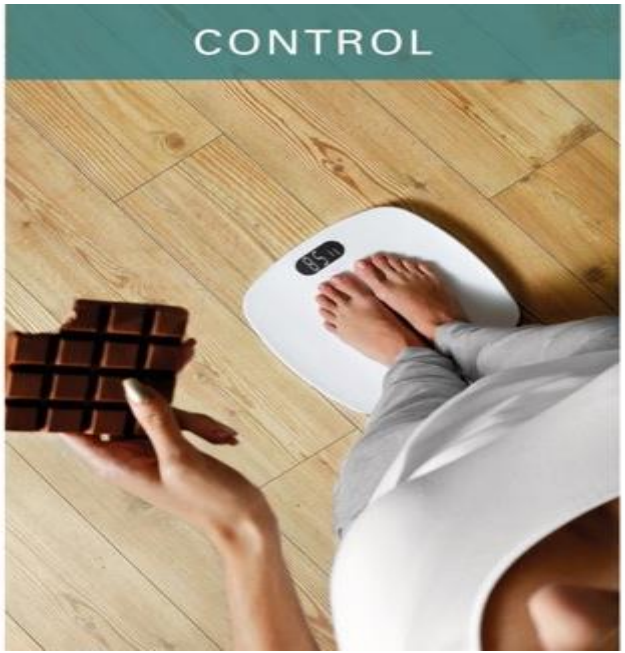
Packaging: Natural colours, ingredients

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	Education	Communication
To guide and support their decision to lead a healthier life	To understand what the right choices are	Creating a meaningful role for sugar in the lives of consumers

Keep it simple, transparent & honest…



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Appendices

1. The Experts

Charlotte Stirling Reed - Nutritionist

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

Lucy McDonald – Blogger
crumbsfood.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.

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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

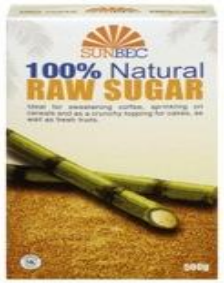


Muscovado

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
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Sugar what does it mean today

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