

# Message and Content Testing

September 22, 2022

## A Summary of Where We've Been

Going into this survey, our objective was to segment our Food Discoverer audience and determine the best approach to grow the maple syrup category and excite a new generation of maple enthusiasts.

From initial findings, we knew 77% of consumers are interested in foods with multiple uses, 83% were interested in the single-ingredient nature of pure maple syrup, and 67% were interested in trying new flavors in food.

Based on this research, we wanted to quantitatively test versatility, purity, and the joy of food discovery messaging to help lead us to clear messaging and visual communications implications.





## Methodology

Golin conducted a survey among 3,123 Americans, ages 16+, in a nationally representative sample from August 11-18, 2022.



## Key Takeaways

1

The average consumer falls into one of four food-related segments: Snooty Foodie, Average Foodie, Cheap and Convenient and Don't Care.

2

A one-two punch of a pure message and a versatile message reaches and attracts the greatest number of consumers.

3

The round label with the leaf in the center performed was considered to be the most useful, most memorable, and most informative of the labels.

4

The internet is where most people will go to find out information about using new ingredients.

5

Americans think those who are involved with the maple industry directly are the most credible voices.



A still life arrangement of honey bottles and jars on a wooden surface against a warm orange background. The scene includes a small glass bottle with a cork stopper, a larger glass bottle with a black cap and a handle, a medium glass bottle with a yellow cap and a handle, and two glass jars with gold-colored lids. A wooden honey dipper is placed behind the jars. The text "Digging Into the Data" is overlaid in the center in white.

# Digging Into the Data

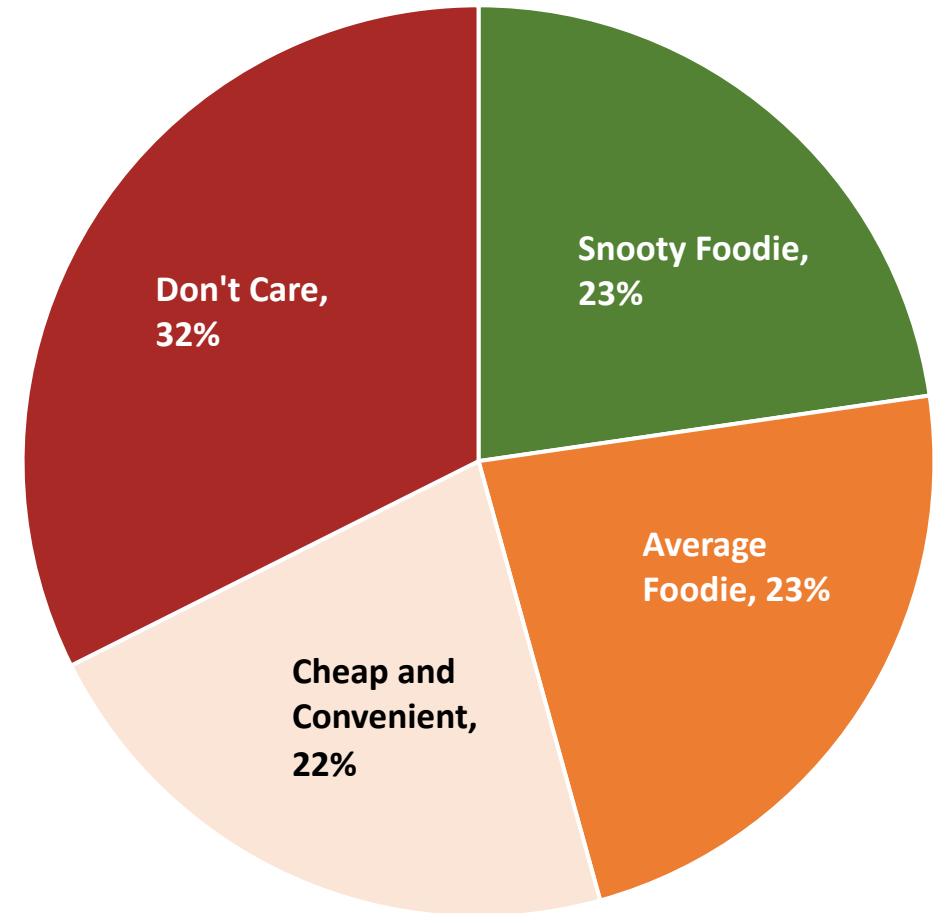
# Statements surrounding consumer behaviors around food help identify our prime targets

- I'm always looking to buy the cheapest food possible.
- I am on a strict, unalterable budget.
- I only consider eating something new if it's not expensive.
- I don't care what ingredients are in my food, as long as it tastes good
- Cooking and baking shows do not appeal to me
- I have a dedication to certain brands despite knowing they are not healthy
- I'll buy food wherever it's convenient to me.
- Food is just fuel to me
- I buy organic foods, despite price differences
- Additives in foods concern me
- I am always looking to improve my diet
- I tend to grocery shop at natural food stores
- Foods that can be used in multiple ways interest me
- I share my meals and/or drinks on social media
- I only cook or bake on special occasions
- I like to experience new foods at restaurants or occasions rather than through cooking myself.
- I like to experiment with familiar ingredients in new or unexpected ways
- I enjoy cooking or baking with ingredients that are new to me
- I look to social media to discover new recipes
- I often seek out new recipes to try at home

*Q1. Of the statements shown below, please indicate which one sounds most like you and which one sounds least like you. (n=3,123)*

## Four segments of food consumers stand out – three of which are opportunities for pure maple.

Q1. Of the statements shown below, please indicate which one sounds most like you and which one sounds least like you. (n=3,123)



# Snooty foodies love to experiment and want the best in food quality.



Millennials and Gen X are most likely to make up the Snooty Foodies



59% identify as female



40% have a HHI above \$100k - the highest of any group



94% enjoy cooking



72% are very likely to buy pure syrup upon exposure to the definition



Most likely to use social media. Proactive attitude with respect to learning about foods





# Average foodies love to experiment but are less likely to pay attention to food quality or their diet compared to snooty foodies due to income constraints.



About equal by generation



62% identifies as female



60% have a HHI of less than \$75k



95% enjoy cooking



43% very likely to buy pure maple syrup upon exposure to the definition



Use word of mouth instead of YouTube.

# While the Cheap and Convenient folks are not as invested in their food choices as others, they show a strong interest in foods that can be used in multiple ways



Most likely to be Boomers, with Gen X starting to show up



54% are male



62% have a HHI of less than \$75k



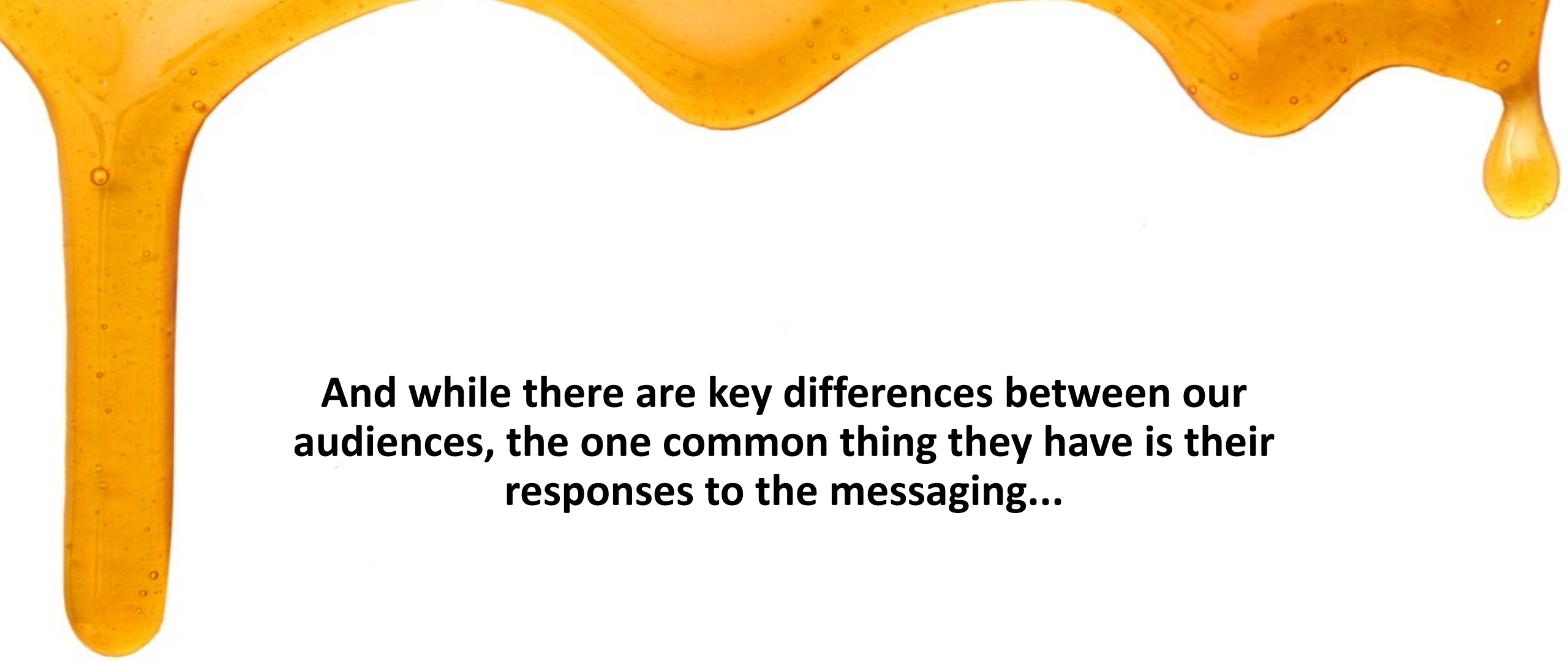
Do not enjoy cooking as much as others



Purchase syrup less often than other groups – only 28% are very likely to purchase pure maple upon exposure to the definition



Word-of-mouth is their preferred way to learn about new foods



**And while there are key differences between our audiences, the one common thing they have is their responses to the messaging...**

# Respondents were shown ten different statements in different orders to determine which ones resonated best and which ones resonated least.

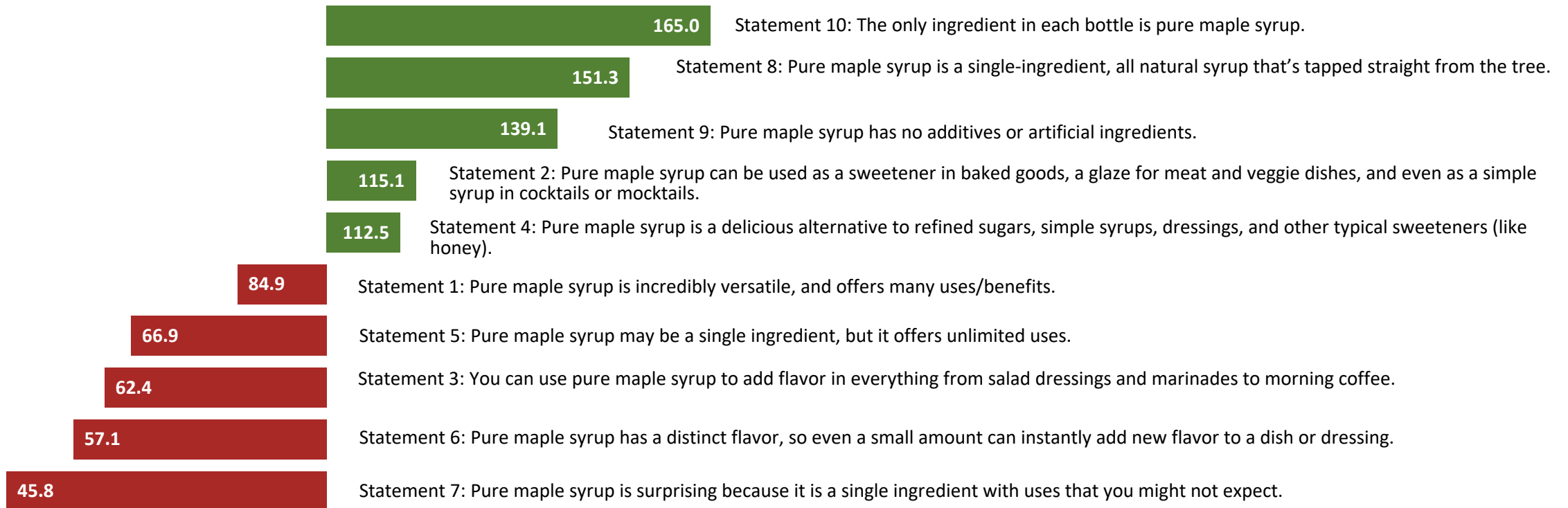
*These statements were refined from previous message testing in focus groups.*

1. Pure maple syrup is incredibly versatile, and offers many uses/benefits.
2. Pure maple syrup can be used as a sweetener in baked goods, a glaze for meat and veggie dishes, and even as a simple syrup in cocktails or mocktails.
3. You can use pure maple syrup to add flavor in everything from salad dressings and marinades to morning coffee.
4. Pure maple syrup is a delicious alternative to refined sugars, simple syrups, dressings, and other typical sweeteners (like honey).
5. Pure maple syrup may be a single ingredient, but it offers unlimited uses.
6. Pure maple syrup has a distinct flavor, so even a small amount can instantly add new flavor to a dish or dressing.
7. Pure maple syrup is surprising because it is a single ingredient with uses that you might not expect.
8. Pure maple syrup is a single-ingredient, all natural syrup that's tapped straight from the tree.
9. Pure maple syrup has no additives or artificial ingredients.
10. The only ingredient in each bottle is pure maple syrup.

*Q16. Of the following statements, please indicate which would make you most likely to consider purchasing pure maple syrup and which would make you least likely to consider purchasing pure maple syrup.(n=3,123)*



# Messages expressing the pureness of maple are strongly preferred over general versatility messages. However, the versatility messages that do resonate tend to provide more specific information about how it can be used.



Q16. Of the following statements, please indicate which would make you most likely to consider purchasing pure maple syrup and which would make you least likely to consider purchasing pure maple syrup. (n=3,123) Indexed scores with mean=100 shown

## Two messages create the optimal combination to reach consumers and pique their interest about pure maple

Using a TURF analysis, we found that we can reach 92% of consumers using a combination of the two following messages

The only ingredient in each bottle is pure maple syrup.

Pure maple syrup is a delicious alternative to refined sugars, simple syrups, dressings, and other typical sweeteners (like honey).

*Q16. Of the following statements, please indicate which would make you most likely to consider purchasing pure maple syrup and which would make you least likely to consider purchasing pure maple syrup. (n=3,123)*



**Visual 1 is the stand-out with one-half of respondents choosing this as the visual they like most.**



	Visual 1	Visual 2	Visual 3	Visual 4
<b>Most Liked</b>	<b>49%</b>	<b>12%</b>	<b>34%</b>	<b>5%</b>
<b>Informed</b>	<b>46%</b>	<b>30%</b>	<b>45%</b>	<b>35%</b>
<b>Useful</b>	<b>97%</b>	<b>92%</b>	<b>95%</b>	<b>85%</b>
<b>Memorable</b>	<b>84%</b>	<b>72%</b>	<b>81%</b>	<b>63%</b>
<b>Purchase Influence</b>	<b>90%</b>	<b>89%</b>	<b>91%</b>	<b>82%</b>
<b>Shareability</b>	<b>77%</b>	<b>80%</b>	<b>80%</b>	<b>66%</b>

*Q10. If the maple industry were to provide a label identifying pure maple syrup from other syrups, which of these potential labels would you MOST prefer to see? Q13. If the maple industry were to provide a label identifying pure maple syrup from other syrups, which of these potential labels would you LEAST prefer to see? (n=1,562)*



# “Real” labels track along with “pure,” but show a slight decline in reputation metrics from “pure.”

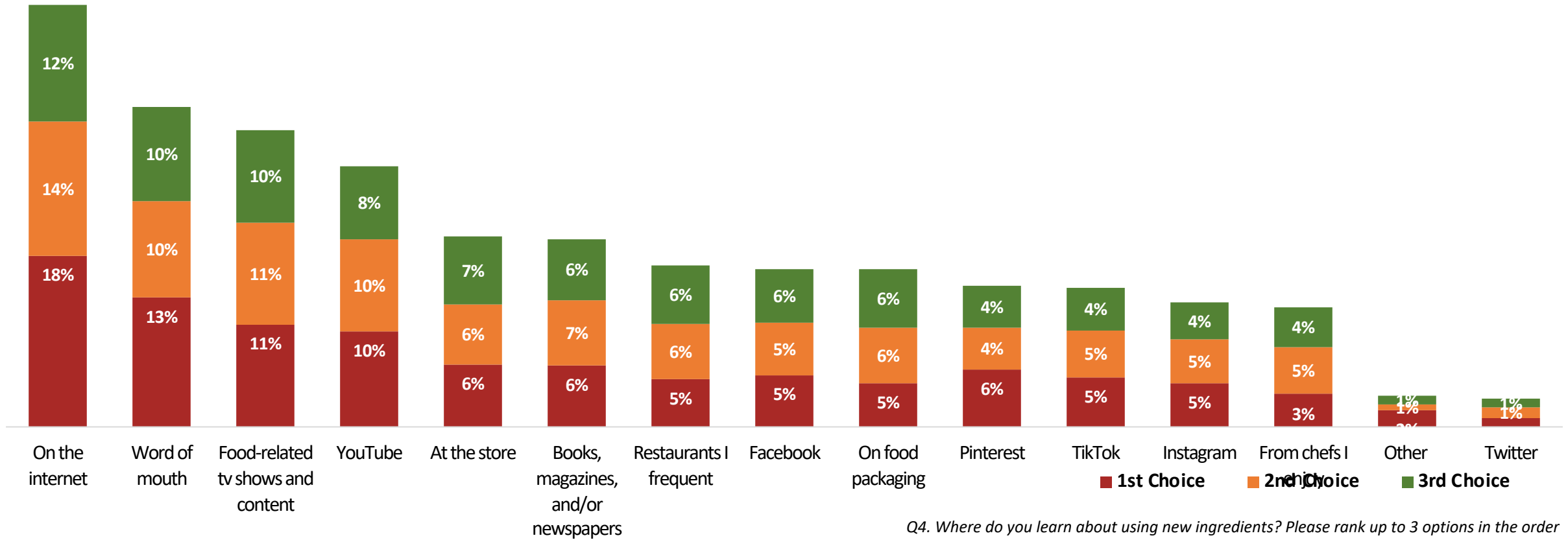


	REAL MAPLE (Circular)	REAL MAPLE (Block)	Real Maple (Serif)	REAL MAPLE (Rectangle)
Most Liked	51%	12%	30%	7%
Informed	45%	33%	45%	35%
Useful	97%	93%	95%	90%
Memorable	81%	74%	81%	71%
Purchase Influence	89%	86%	88%	80%
Shareability	77%	75%	72%	63%

Q10. If the maple industry were to provide a label identifying pure maple syrup from other syrups, which of these potential labels would you MOST prefer to see? Q13. If the maple industry were to provide a label identifying pure maple syrup from other syrups, which of these potential labels would you LEAST prefer to see? (n=1,561)



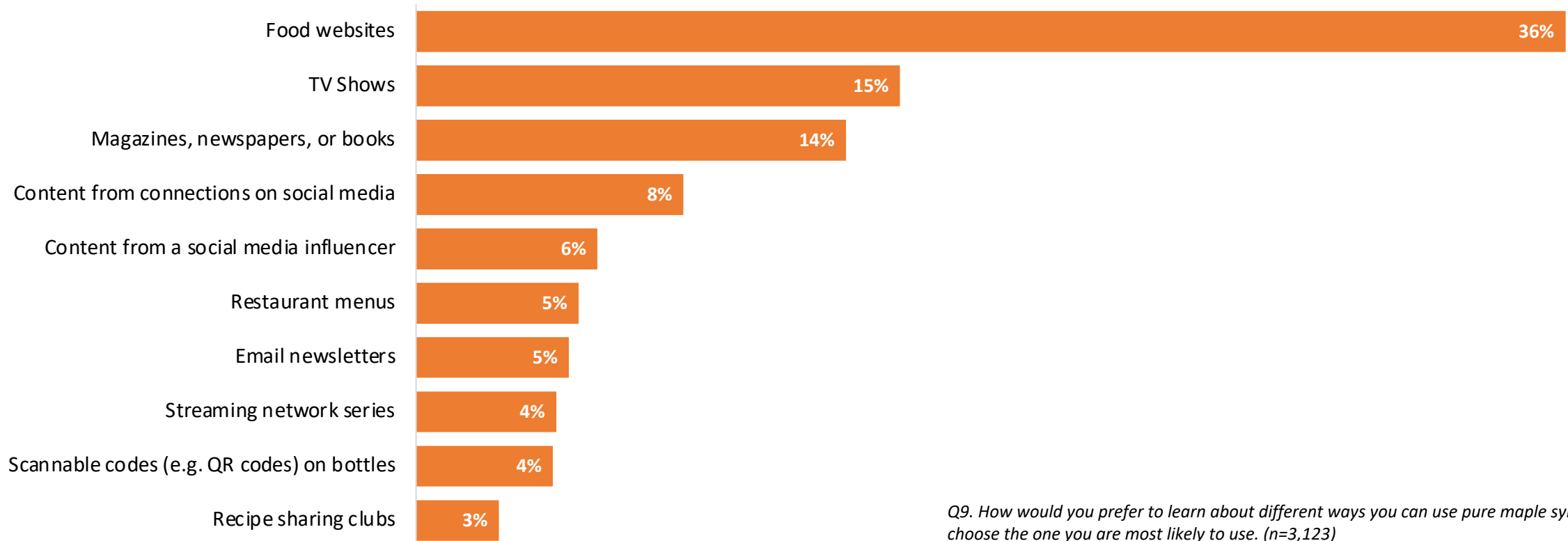
# Nearly one-half of people use the internet to learn about using new ingredients. Word of mouth and tv/streaming content are also popular ways to find out how to use new ingredients.



Q4. Where do you learn about using new ingredients? Please rank up to 3 options in the order you use most as references. (n=3,123)



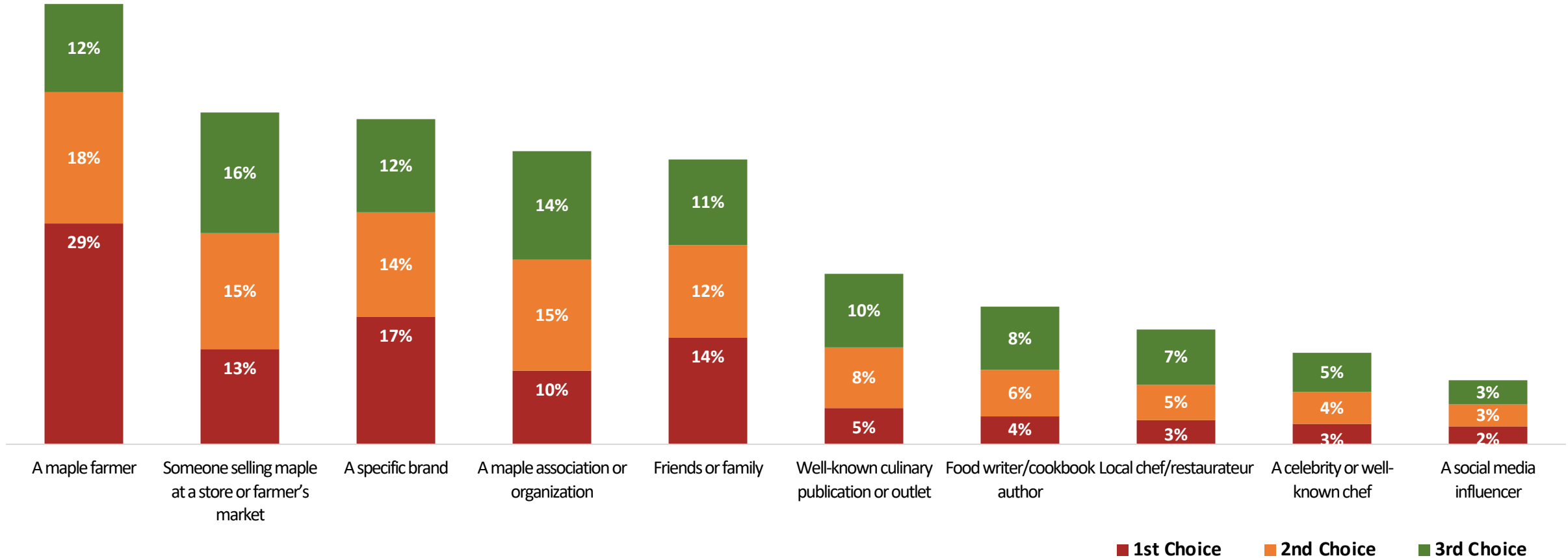
# Traditional channels for information gathering, such as websites, tv, and print media are where people are most likely to turn for information on using pure maple.



Q9. How would you prefer to learn about different ways you can use pure maple syrup? Please choose the one you are most likely to use. (n=3,123)



# Having a maple farmer reach out via preferred channels would provide consumers with the best sense of credibility on speaking about pure maple syrup.



Q8. When thinking about pure maple syrup, please choose the top three most credible sources from the following list. (n=3,123)



# Implications

Focus on consumers that place value on food quality and the experience of food

Use a voice that's directly from the industry to establish authority and credibility for messaging

Lean into single-ingredient first to increase awareness and lean into versatility to increase consideration and purchase

Meet consumers where they go for information to introduce the "why" and couple it with key spokespeople to show the "how"



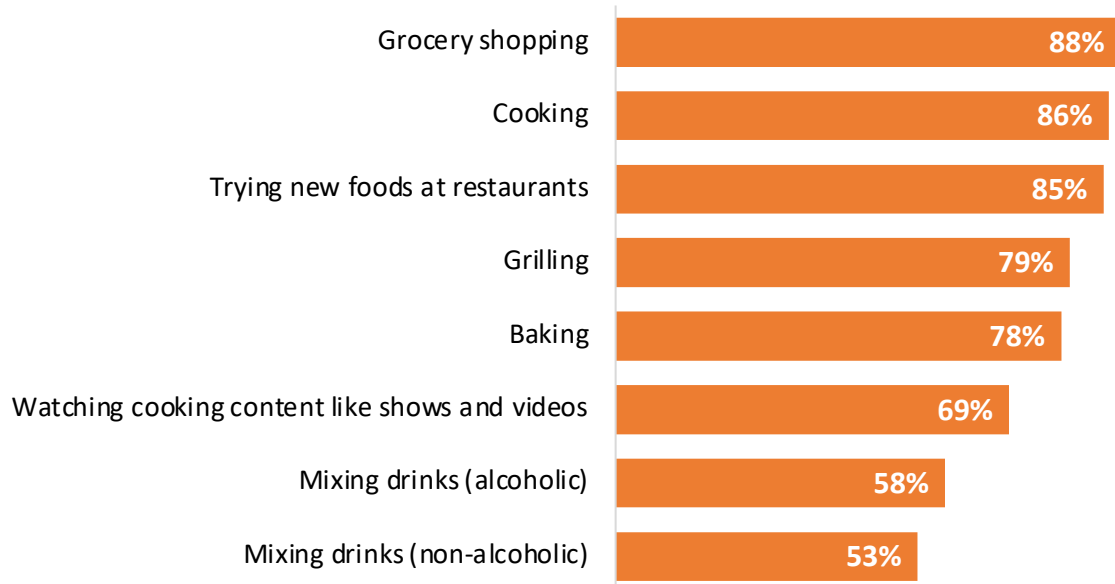
# Appendix



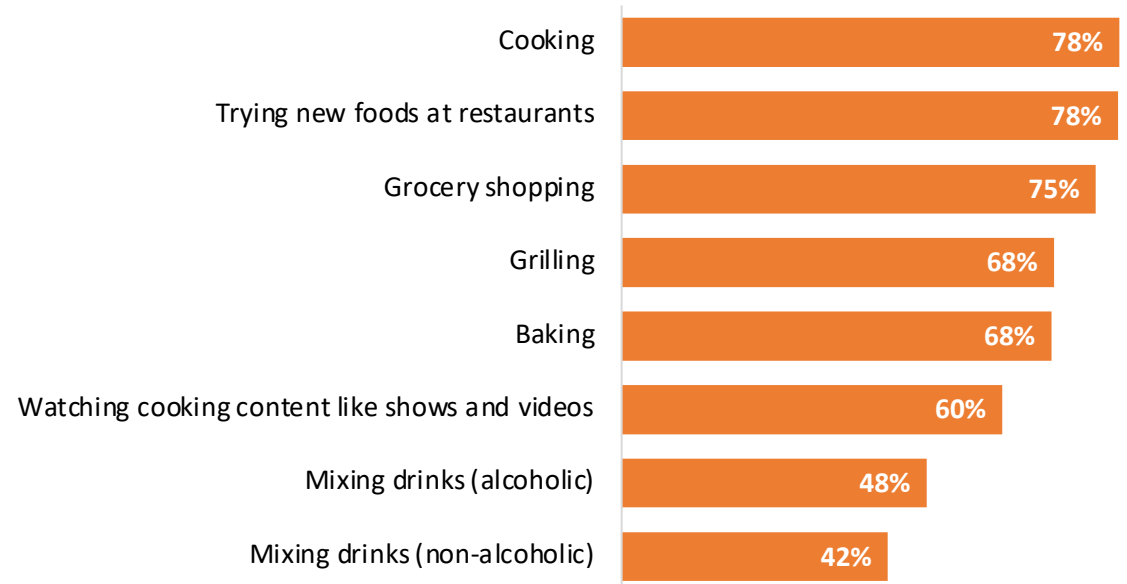
# People report a higher level of interest in shopping for, prepping, making, and trying food than they are to report enjoying doing these things.

However, beverage preparation – both alcoholic and non-alcoholic is the least interesting and enjoyable of all the items.

## Interested

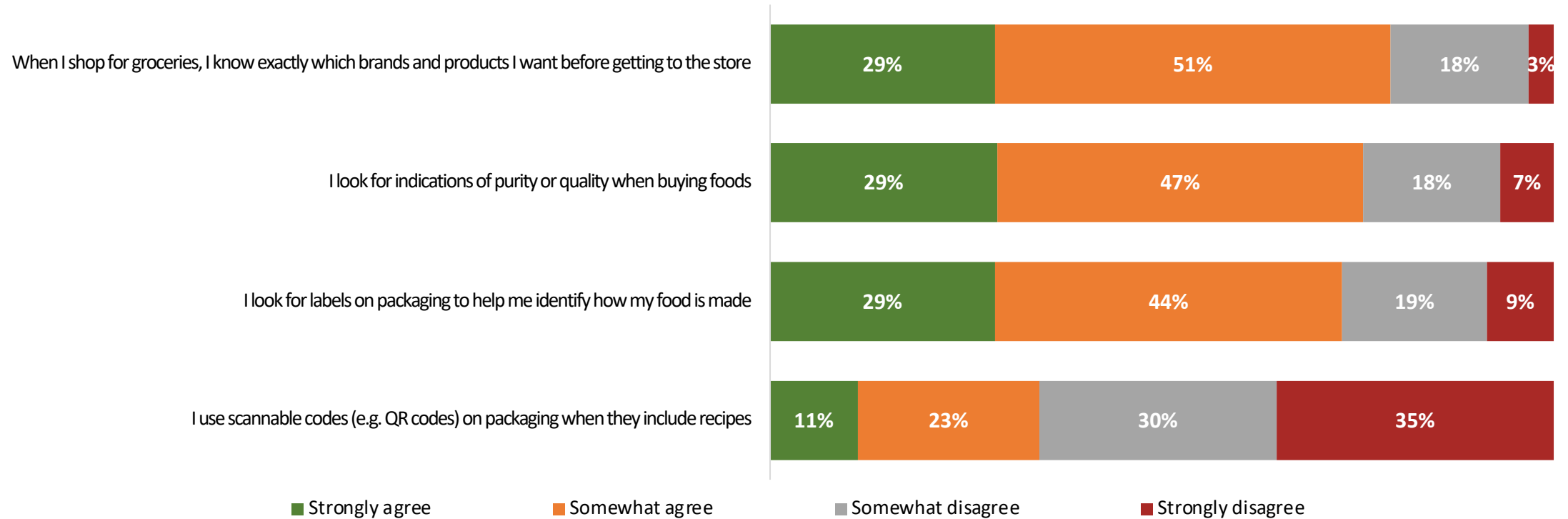


## Enjoy



Q2. Please indicate how interested you are in each of the following. (n=3,123) Q3. Please indicate how much you enjoy each of the following. (n=3,123)

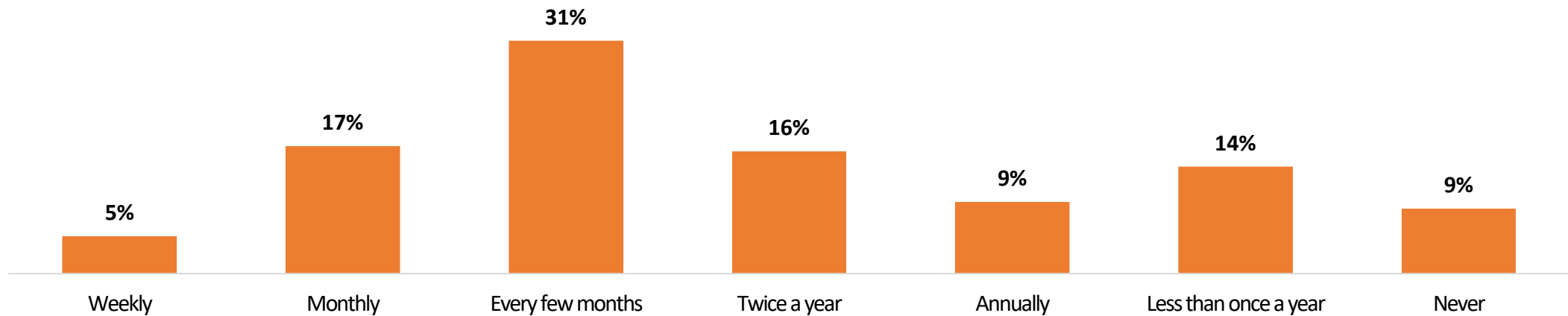
# Only one-third of consumers report using scannable codes on packaging for recipes. Three-quarters of consumers know exactly what they want when they grocery shop.



Q5. Please rate how much you agree or disagree with the following statements. (n=3,123)



**One-third of consumers report buying maple syrup every few months, and one-quarter of consumers report purchasing it monthly or more frequently.**



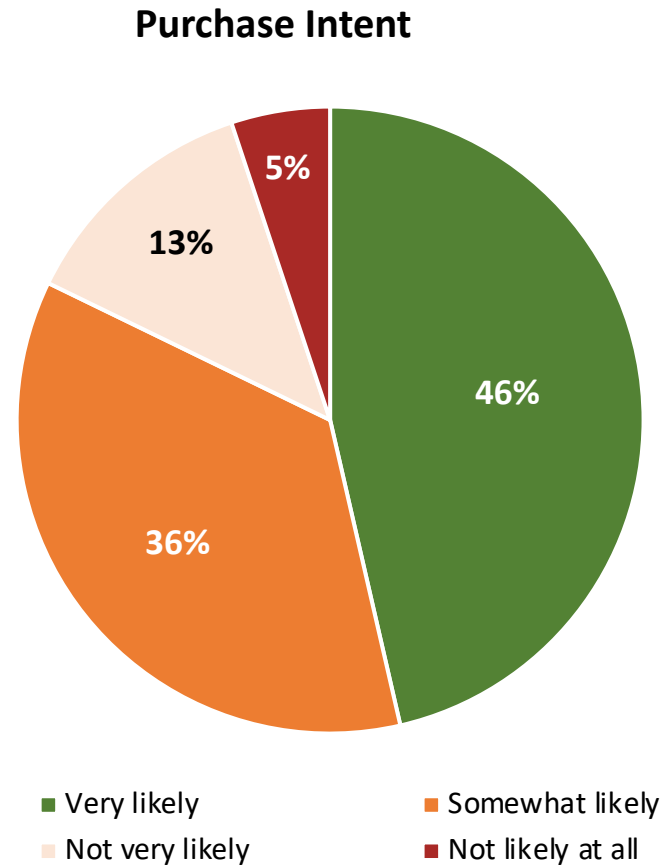
Q6. How frequently do you purchase maple syrup?(n=3,123)



# The vast majority of consumers feel compelled to purchase pure maple syrup upon reading its definition

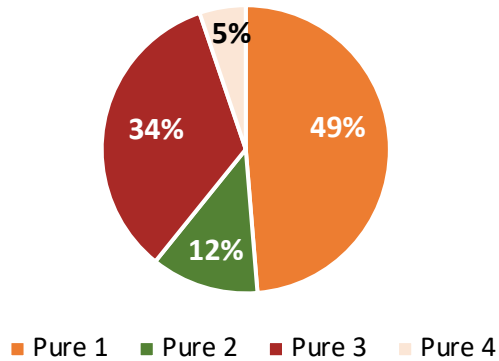
“Pure maple syrup is made from tapping a maple tree and boiling the sap and has no additional ingredients. Table syrup consists of sweeteners not derived from maple and has additives that may be mixed with maple flavoring. Table syrup does not generally include pure maple syrup from the tree.”

Q7. Based on the statement above, how likely are you to purchase pure maple syrup?  
(n=3,123)

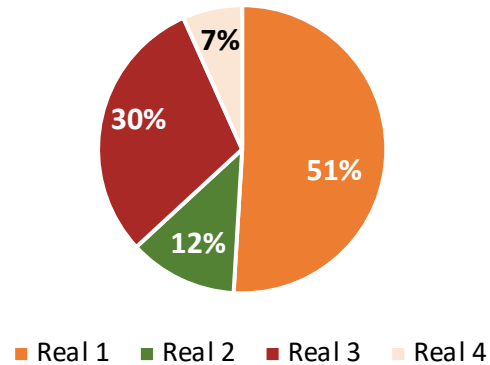


# Regardless of whether it's “pure” or “real”, one-half of respondents most liked Image 1, and nearly one-half least liked Image 4

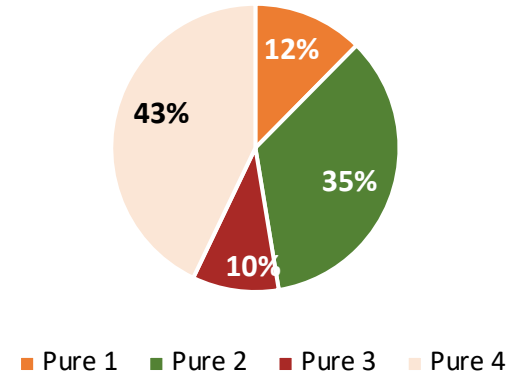
Most Liked (n=1,562)



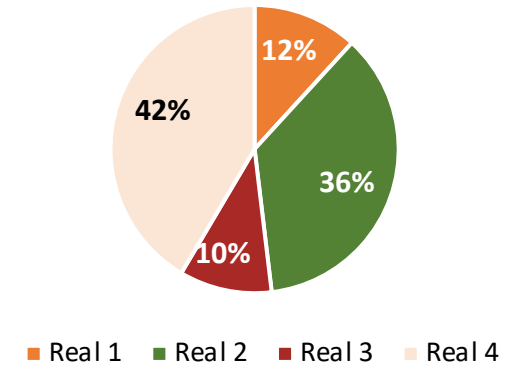
Most Liked (n=1,561)



Least Liked (n=1,562)



Least Liked (n=1,561)

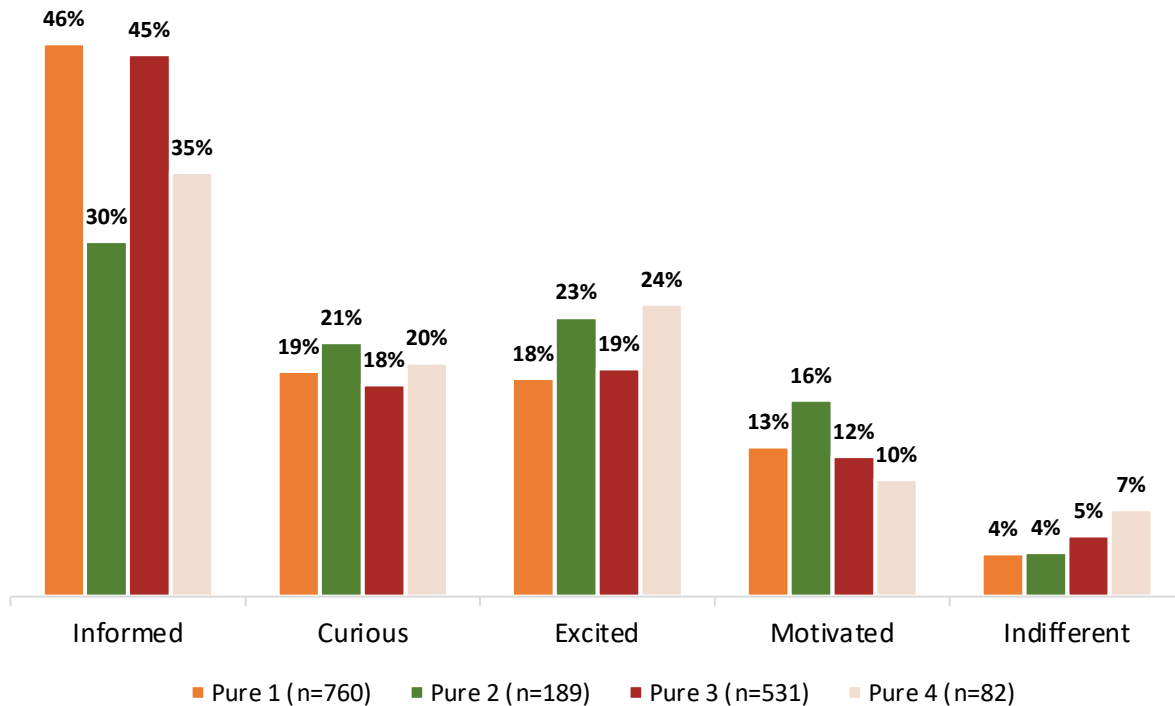


Q10. If the maple industry were to provide a label identifying pure maple syrup from other syrups, which of these potential labels would you MOST prefer to see? Q13. If the maple industry were to provide a label identifying pure maple syrup from other syrups, which of these potential labels would you LEAST prefer to see?

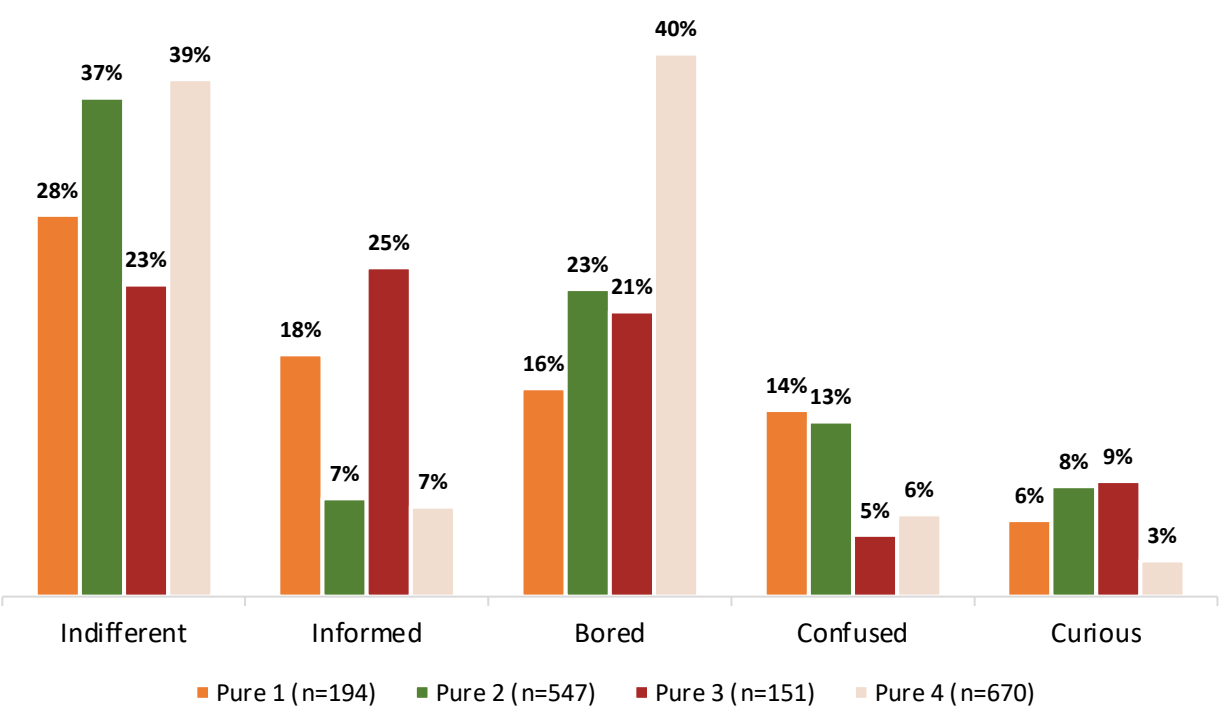


Feeling informed leads to the greatest emotional connection when showing the “pure” maple images. Indifference, and therefore a lack of emotional connection, drives a respondent to choose the image they least like.

Most Liked



Least Liked

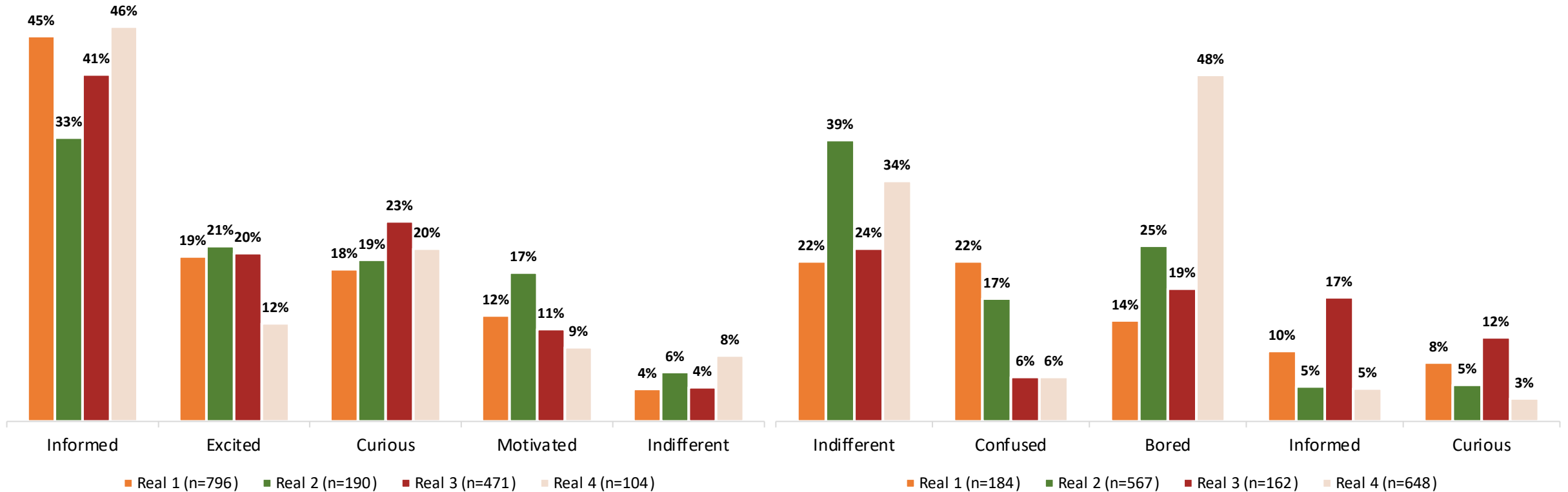


Q11/14. How does this potential label make you feel?

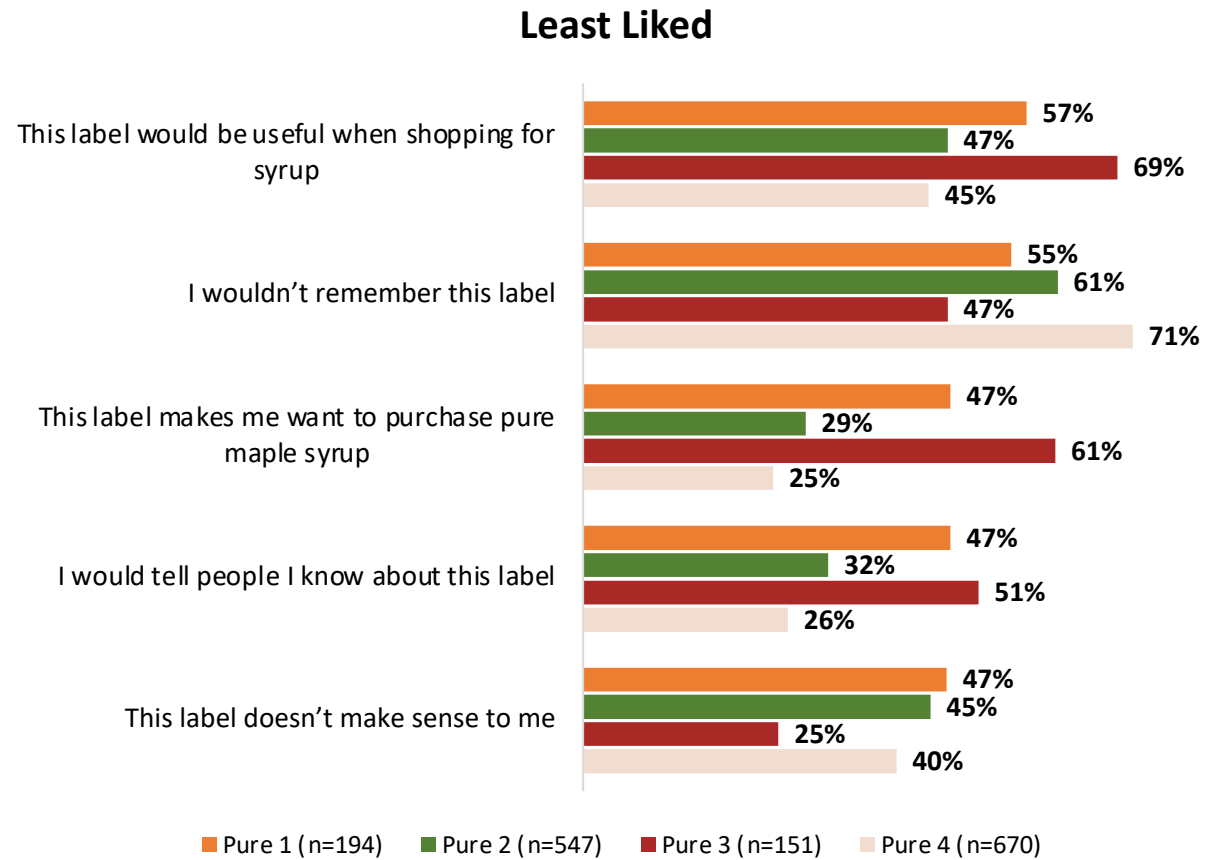
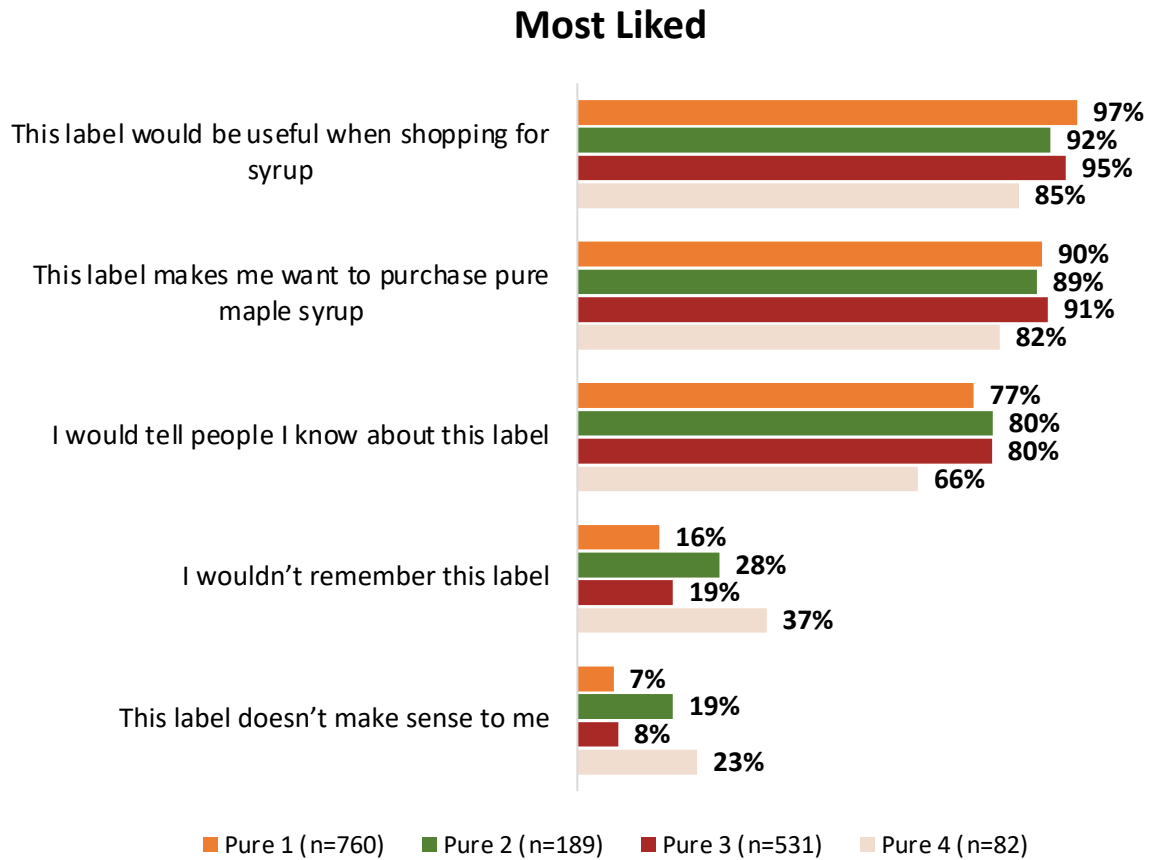
We see a similar trend with the “real” images as the “pure” images.

Most Liked

Least Liked

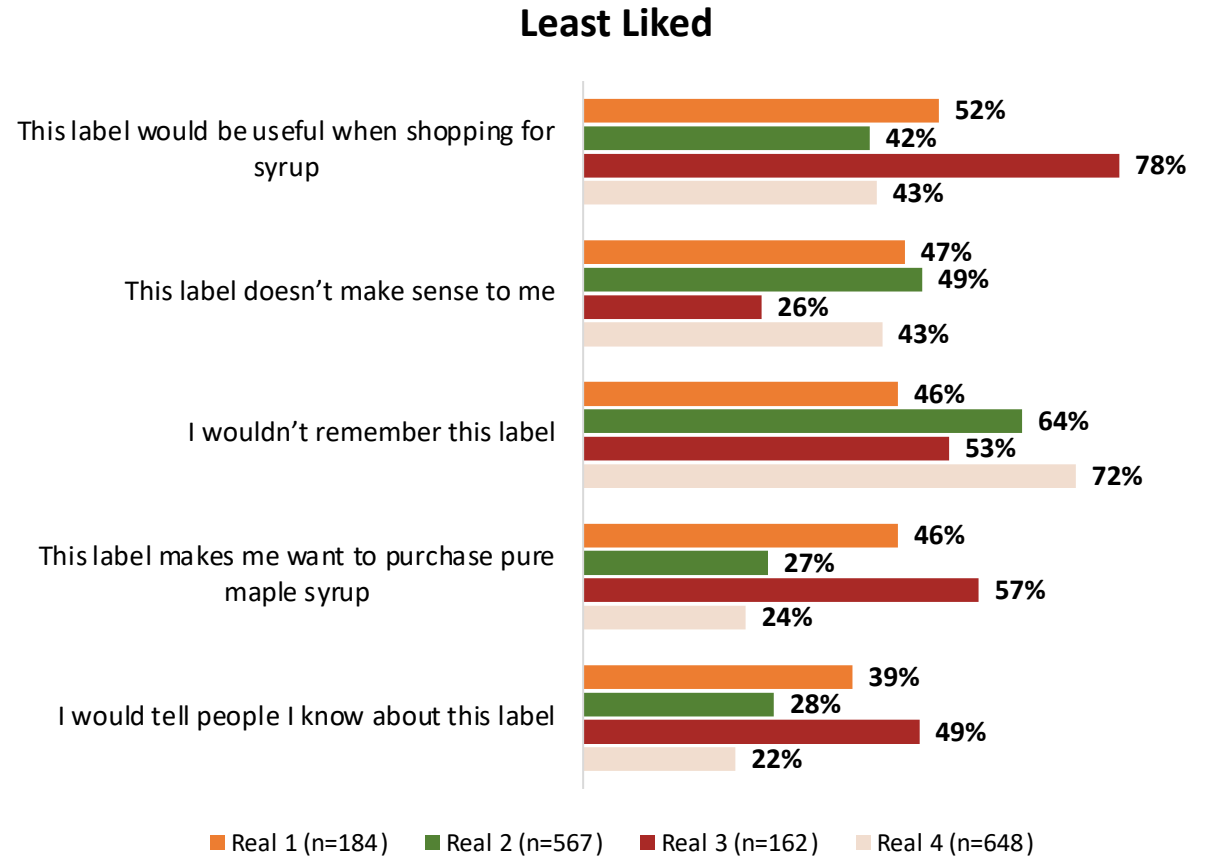
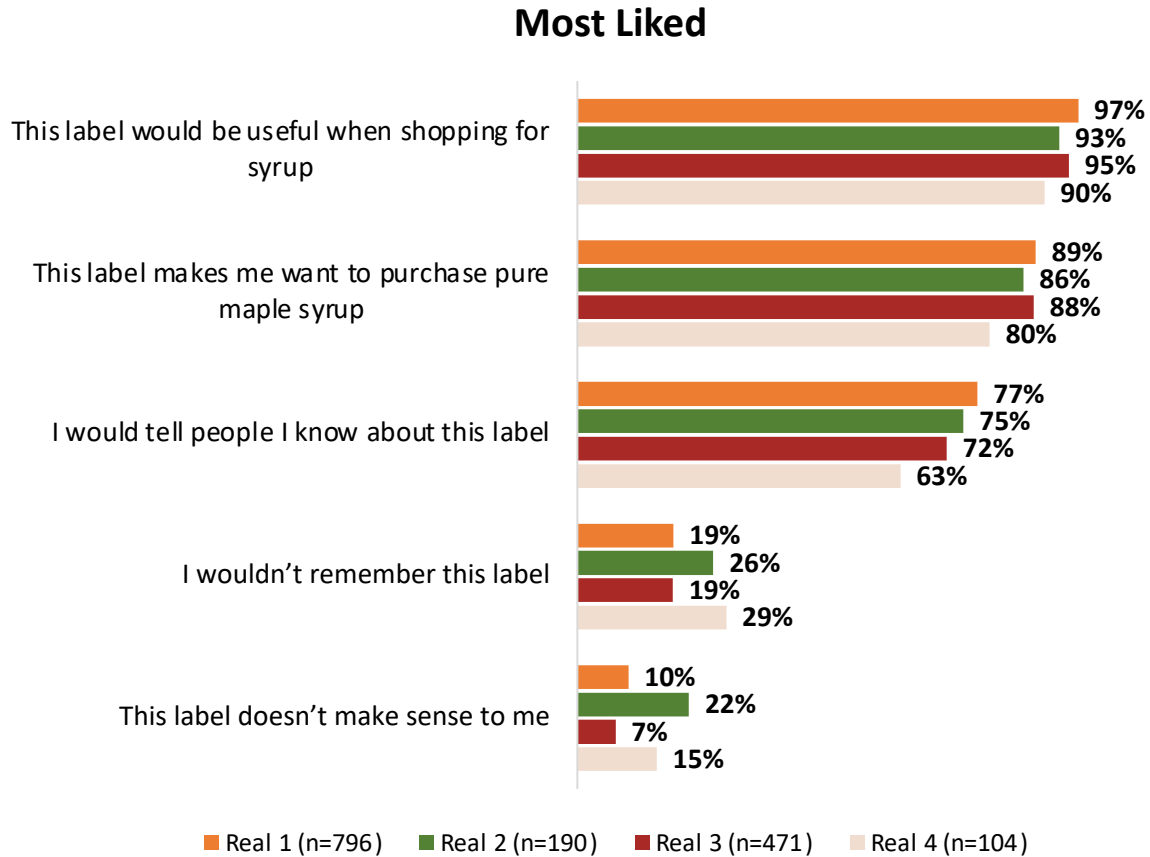


# Labels that are most liked are more informative, persuasive, and memorable. Those that are least liked are not memorable and more confusing to the consumer.



Q12/15. Please indicate how much you agree or disagree with the following statements when considering this potential label.

# Labels that are most liked are more informative, persuasive, and memorable. Those that are least liked are not memorable and more confusing to the consumer.



Q12/15. Please indicate how much you agree or disagree with the following statements when considering this potential label.