

NYSMPA Pilot Survey

March 16, 2022

GOLIN



Methodology



Golin, on behalf of NYSMPA, conducted a survey among 1,684 Americans in a nationally representative sample.

The objective of this survey is to better understand perceptions of the differences between pure and imitation syrup, what kind of messaging around pure maple is attractive to consumers, and what differentiates prospective buyers.

KEY FINDINGS



Versatility is Key. Human nature attributes of habit and convenience-seeking alongside the many uses of maple helps drive purchase intent.

Millennials are an untapped opportunity. Millennials show the greatest distinction among all generations when it comes to reported pure maple familiarity and purchase history.

Cost cuts both ways. There is a group of Americans who don't believe that pure maple is too expensive; however, two thirds disagree with this and can pose a challenge.

Familiarity and usage drives purchase. Engaging with the product itself is what expands consumers' perception of how to use maple syrup, and the flavor keeps them coming back for more.

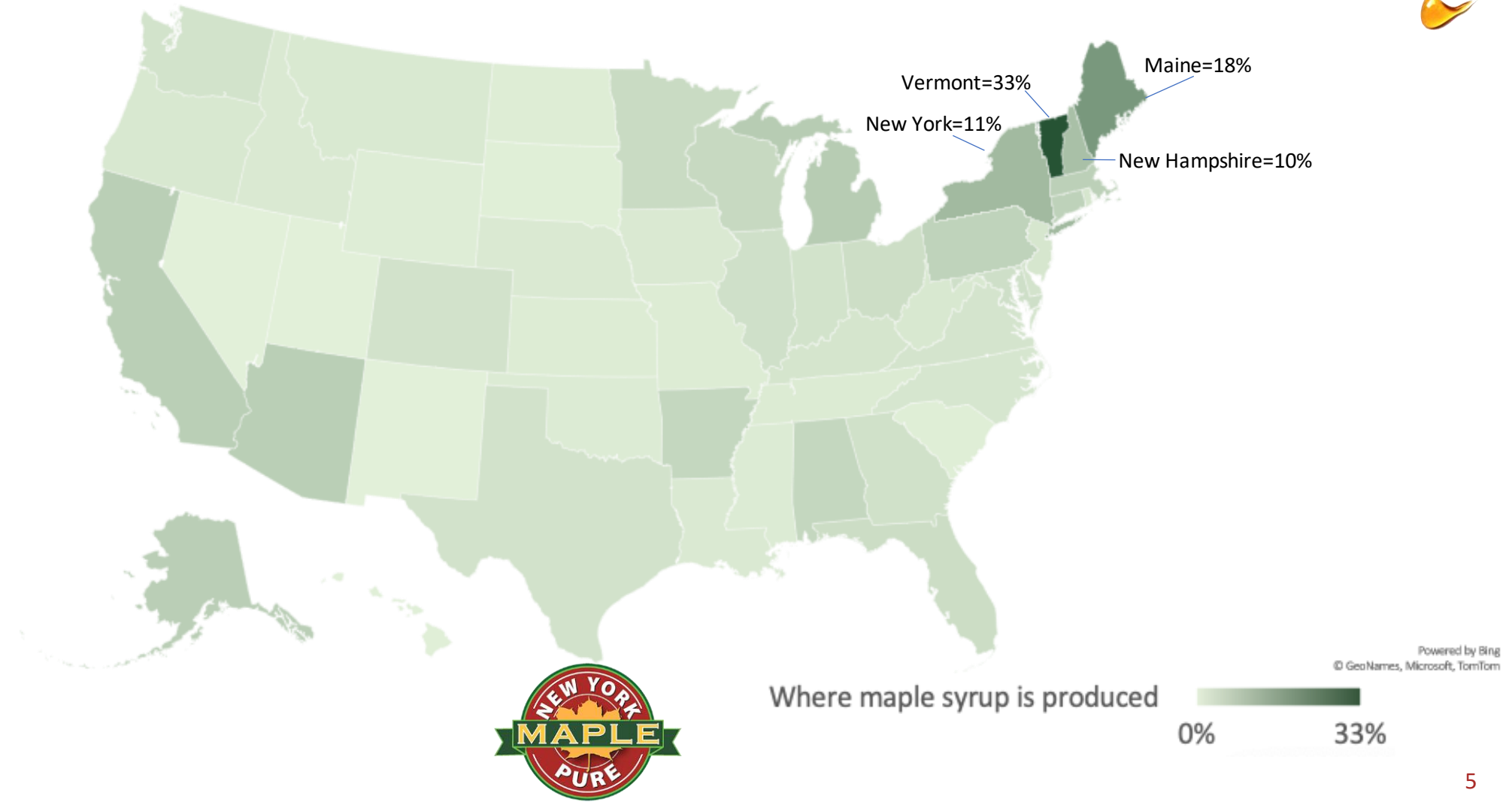
Pure Familiars exist but are a small group. They are more engaged with food and the environment, resulting in an audience that is more educated in these areas.



CONSUMERS AND SYRUP

(not necessarily maple!)

81% of American consumers believe maple is produced in the USA. Vermont has a significant lead over all other states in the state-specific production perception



When we say maple syrup, people think...

"A condiment that goes on your pancake"

"Canada at first, then Vermont! I also think of a natural way to sweeten things"

"real maple syrup versus the corn syrup-based pancake syrup that you buy at the supermarket"

"A sugary substance that comes from maple trees and used on foods"

"A tree and then a stack of pancakes with melted butter dying for some maple syrup"

"Pure and natural right from the maple trees in Vermont"

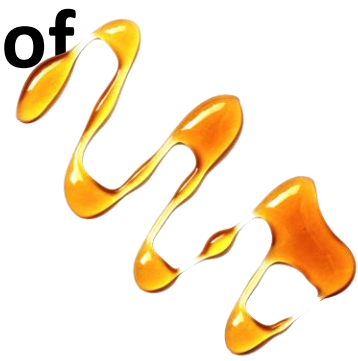
"Pancake, waffles, breakfast foods in general, also maple syrup goes amazing in pork roast"

"A great sweetener if it's organic and not processed"

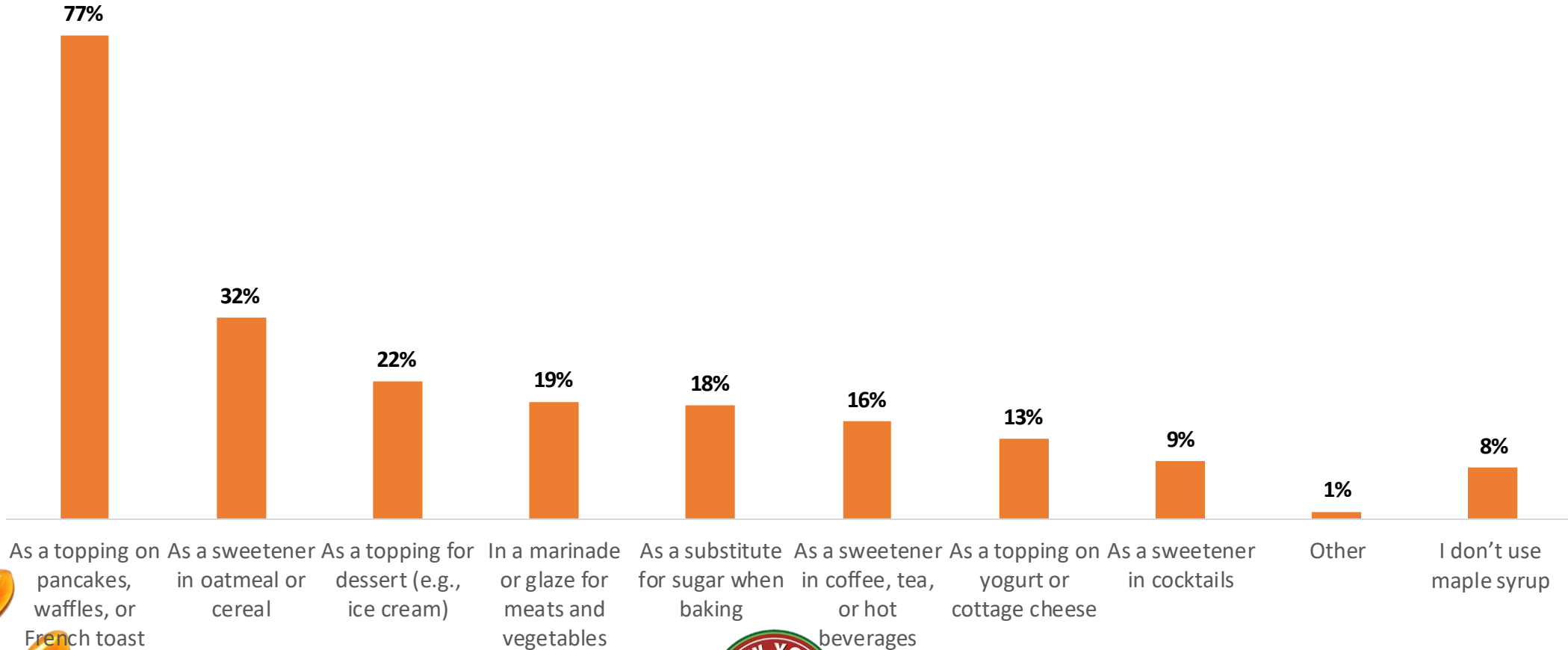
*"A very costly indulgence, usually either exotic or produced locally *exclusively* in New England states - particularly Vermont - unless it is Log Cabin (Brand) Syrup"*



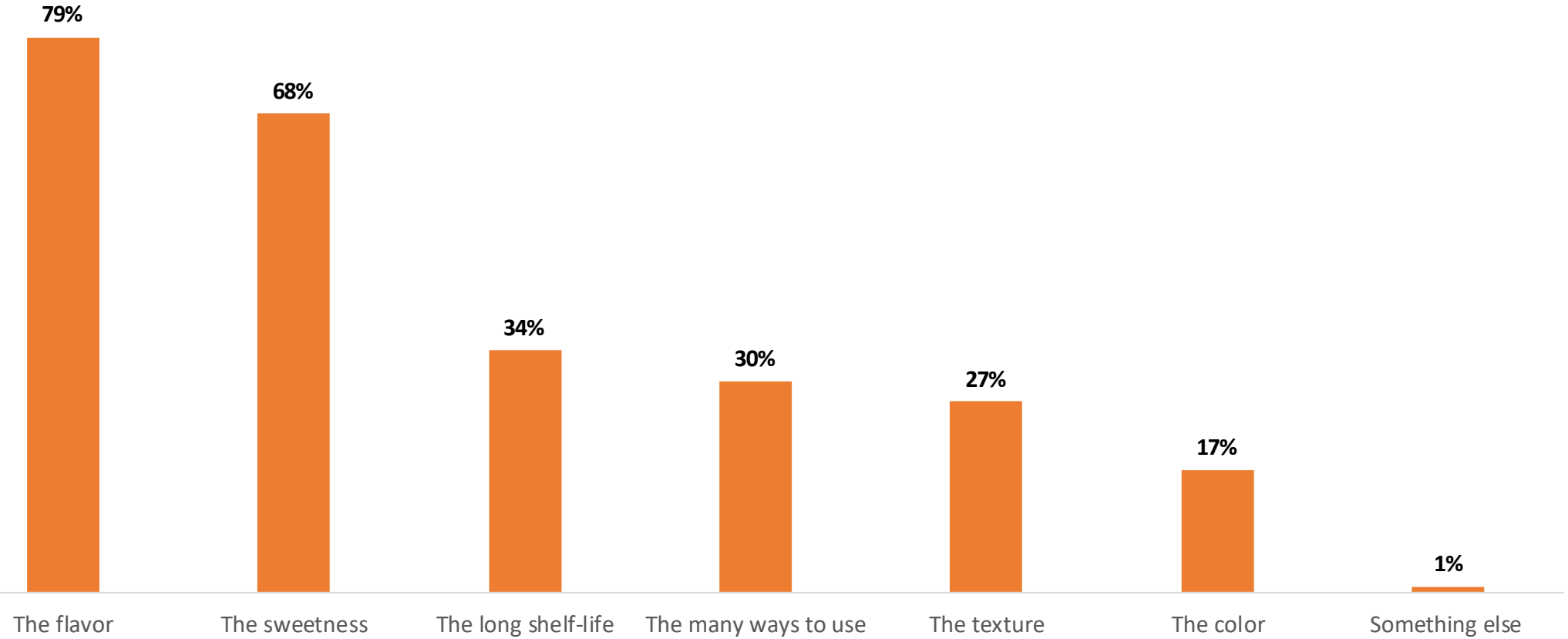
The majority of American consumers use syrup, but the king of use is as a pancake topping



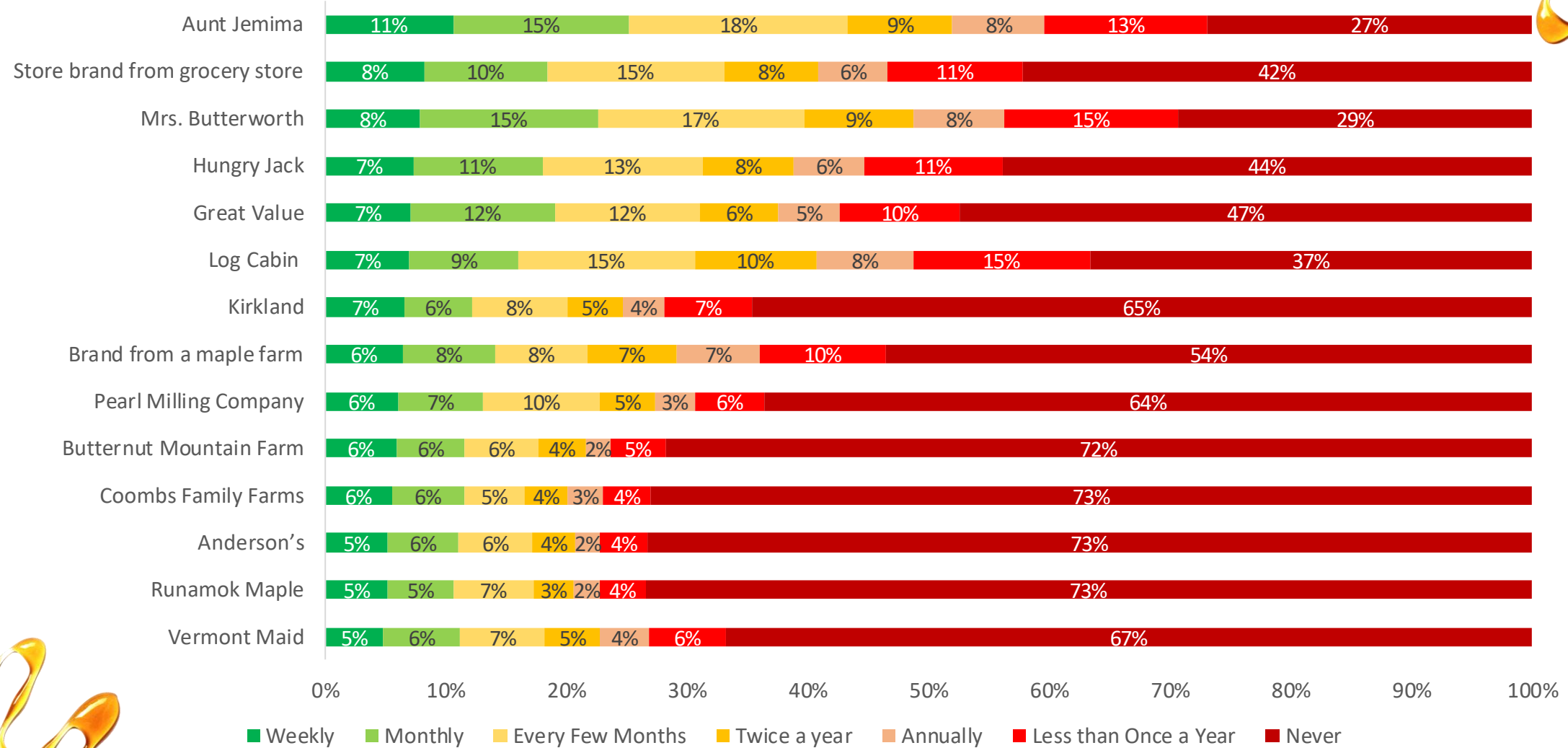
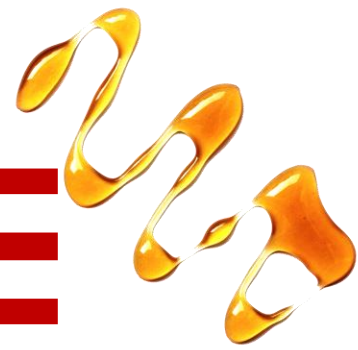
No surprise there!



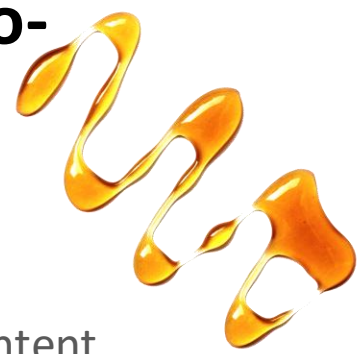
And they love syrup, pure or imitation, for the flavor



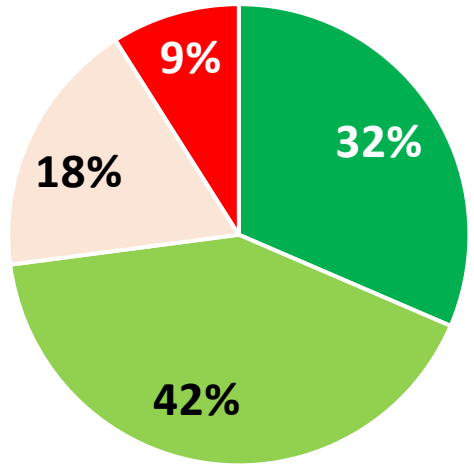
Regardless of brand, most consumers purchase syrup on a monthly to every few months basis



Overall, consumers appear to be familiar with pure maple. Nearly two-thirds of consumers report having purchased pure maple, with even more expressing intent to purchase pure maple

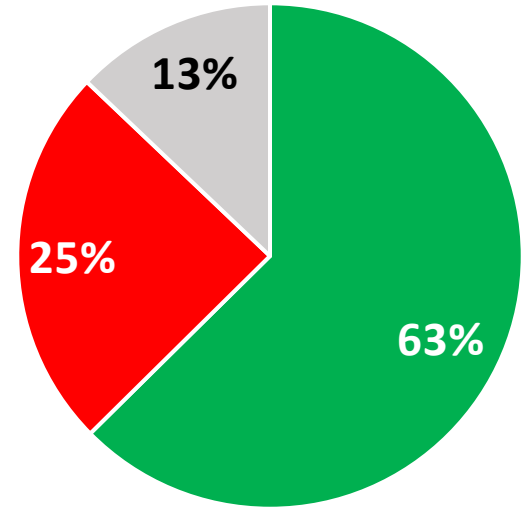


Familiarity



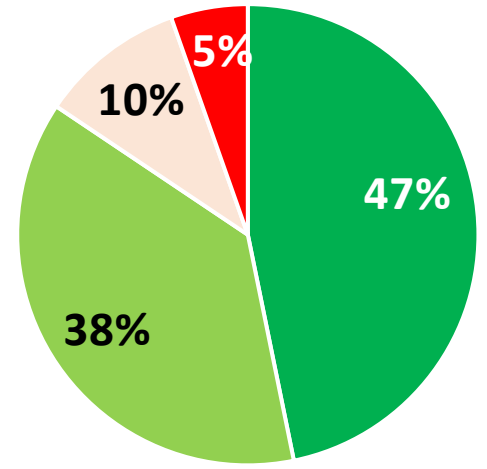
■ Very familiar ■ Somewhat familiar
■ Not very familiar ■ Not familiar at all

Purchase History



■ Yes ■ No ■ Not sure

Purchase Intent

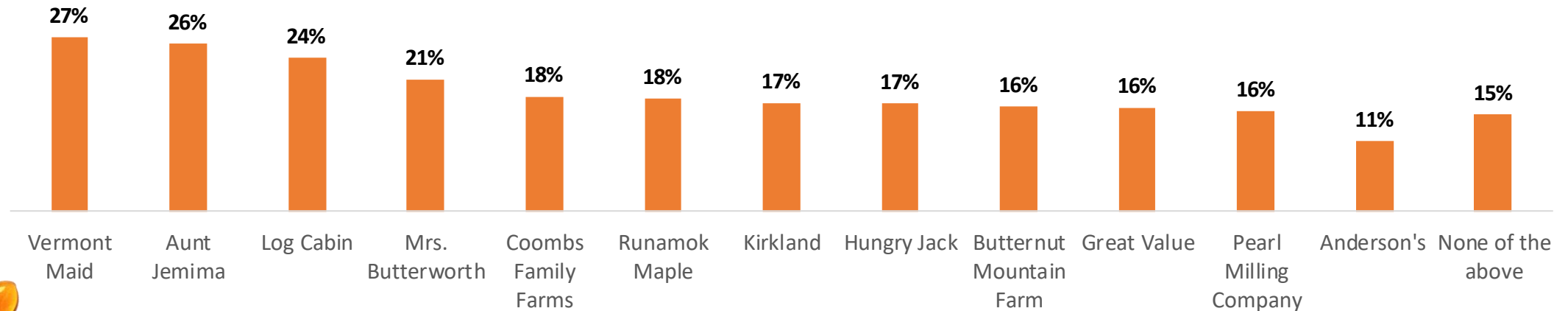


■ Very likely ■ Somewhat likely
■ Not very likely ■ Not likely at all

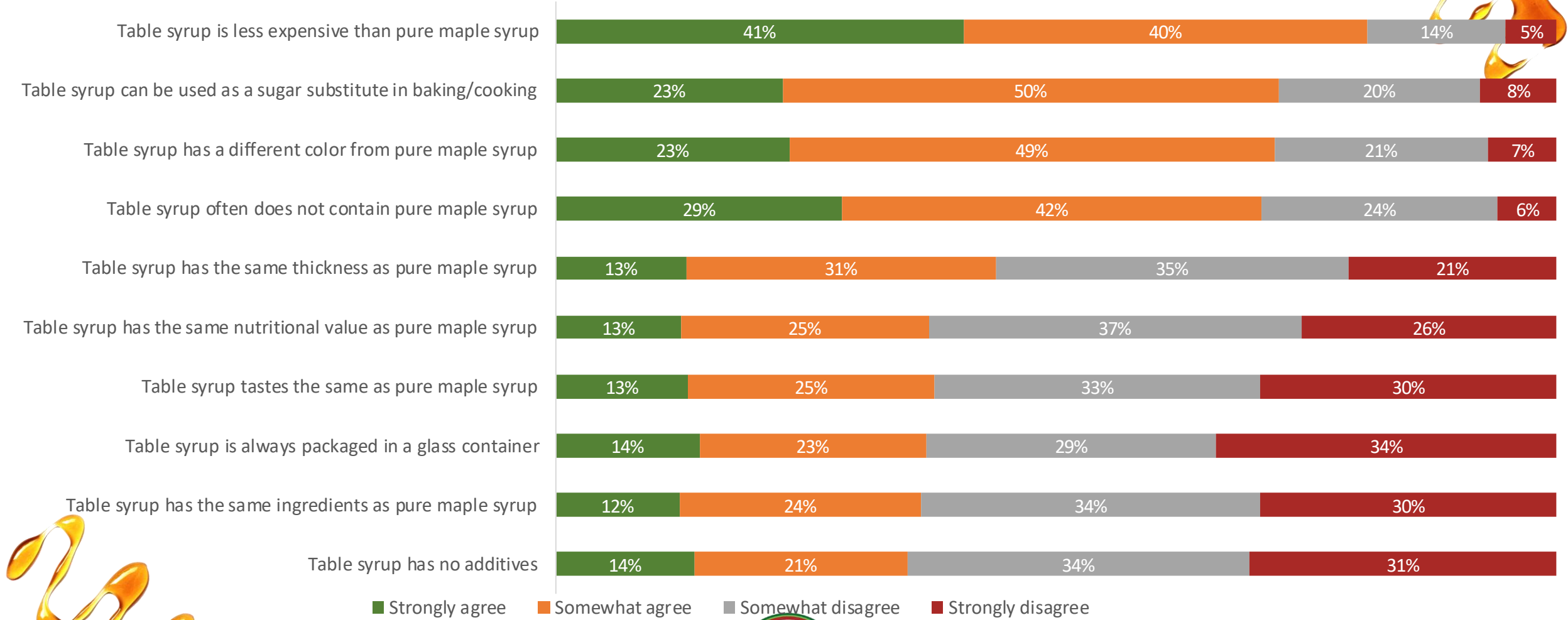
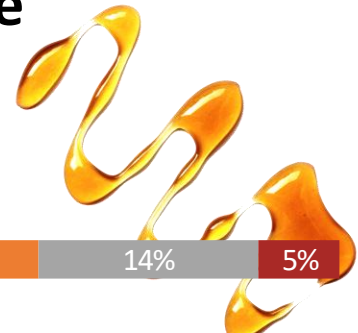


Q10. How familiar are you with pure maple syrup? n=1684; Q13. Based on the statements above, have you purchased pure maple syrup in the past? n=1684; Q14. Now that you are aware of the differences between pure maple syrup and table syrup, how likely are you to purchase pure maple syrup? n=1684

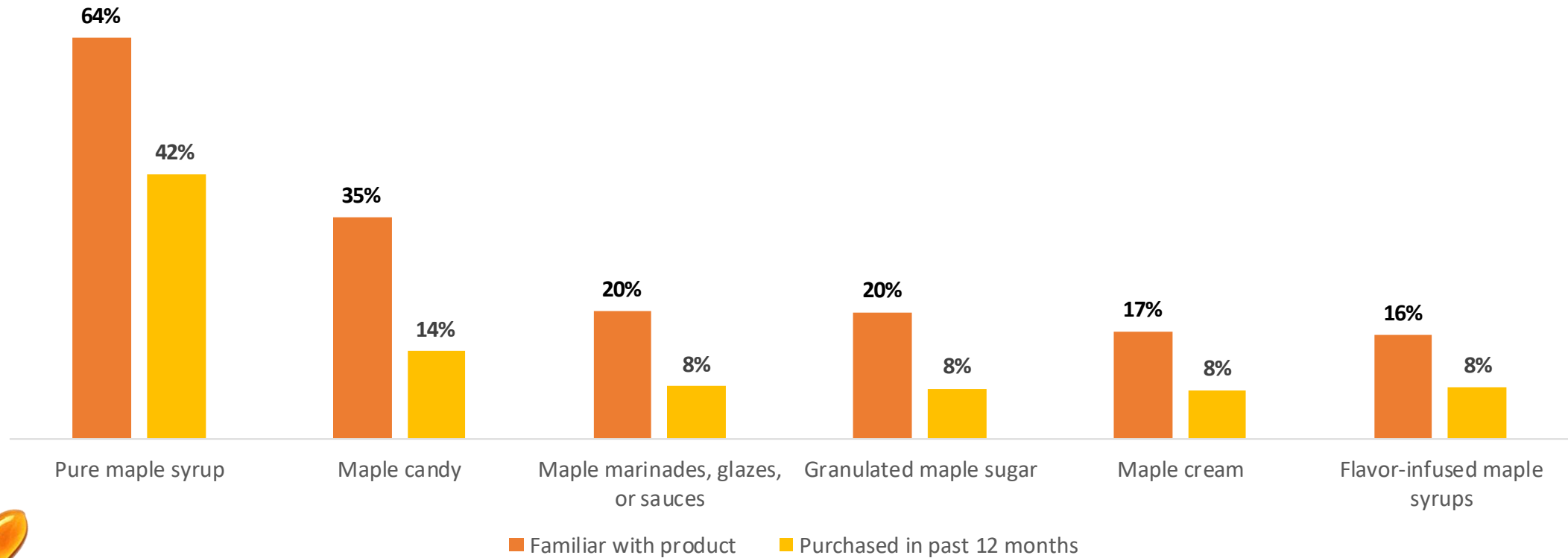
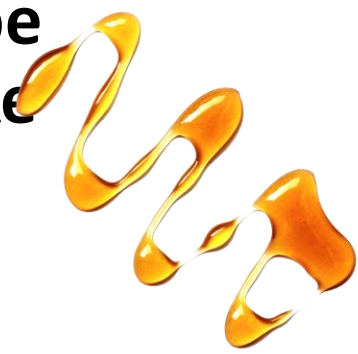
Yet when they are asked which brands offer pure maple, the lack of familiarity with pure maple shows



Consumers overwhelmingly perceive pure maple to be more expensive than table syrup, but appear to be well-educated about pure maple despite their lack of knowledge of brand offerings

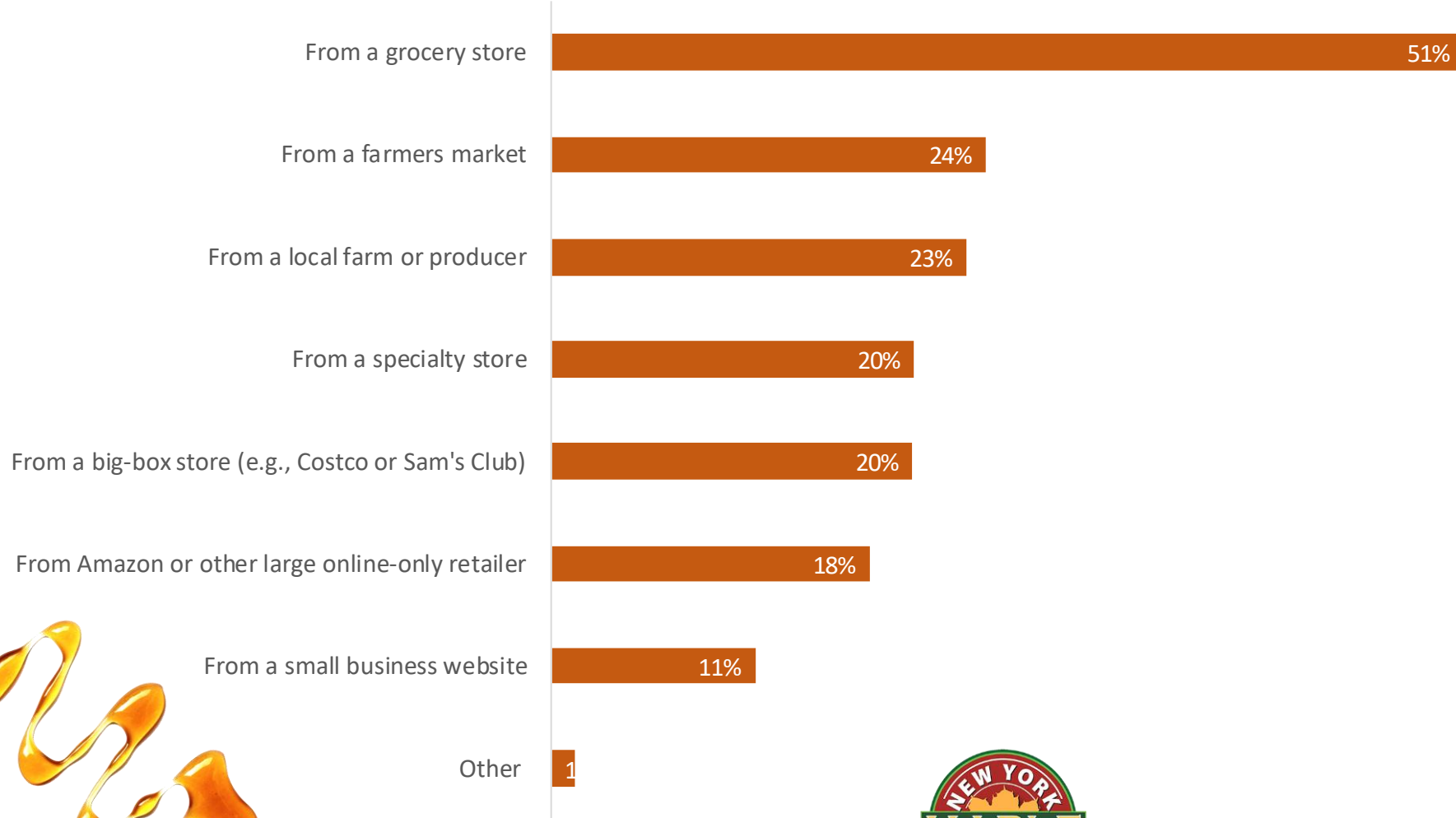


The high familiarity and purchase history of pure maple syrup could be a gateway for talking about a product that has a myriad of uses, unlike many of the other pure maple products



Q20. Which of the following pure maple products are you familiar with? Please select all that apply. n=1684; Q21. Which of the following pure maple products have you purchased in the past 12 months? Please select all that apply.

In-store shopping at the grocery store is still the most popular way to purchase pure maple products



	In-store	Online	n
From a grocery store	93%	19%	n=530
From a farmers market	89%	17%	n=253
From a local farm or producer	86%	20%	n=241
From a specialty store	80%	33%	n=211
From a big-box store (e.g., Costco or Sam's Club)	83%	30%	n=210



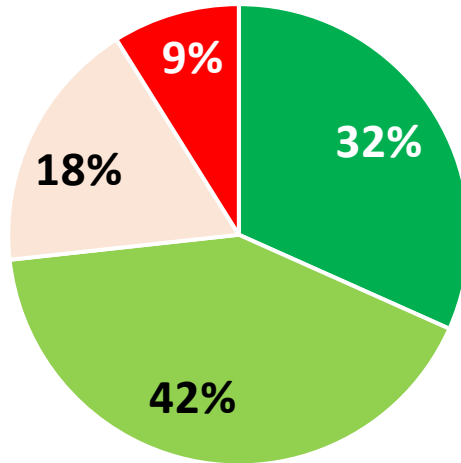
Q22. Where have you purchased pure maple products? Please select all that apply. n=1040; Q23. How do you purchase pure maple products? Please select all that apply.

The image features three white plastic spoons arranged vertically on a teal background. Each spoon contains a small amount of yellow liquid. The top spoon has a single drop of liquid above it. The middle spoon has the text 'PURE FAMILIARS' overlaid on it. The bottom spoon has a single drop of liquid below it. The text is in a bold, white, sans-serif font.

PURE FAMILIARS

Introducing... the Pure Familiar

Familiarity



- Very familiar
- Somewhat familiar
- Not very familiar
- Not familiar at all

Of the 74% (n=1,229) who claim familiarity with pure maple, only 21% (n=252) are Pure Familiars, meaning that they did not select any table brands as a pure maple brand. The remaining 79% (n=977) are Fake Familiars, meaning they claim familiarity with pure maple, but also selected table brands as brands that offer pure maple.

In reality, this means that 15% of consumers overall are those familiar with pure maple.



Q10. How familiar are you with pure maple syrup? n=1684; Q13. Based on the statement above, have you purchased pure maple syrup in the past? n=1684; Q14. Now that you are aware of the differences between pure maple syrup and table syrup, how likely are you to purchase pure maple syrup? n=1684

The Pure Familiar is more likely to ...



Be Gen X or older



Reside in the NE



Have a HHI of \$100K+



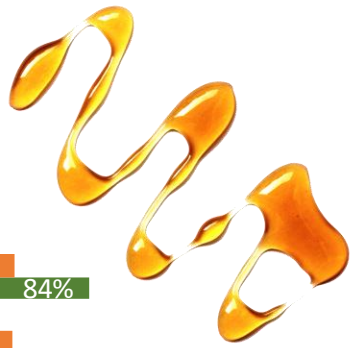
Have purchased maple syrup



Use it more than just as a topping

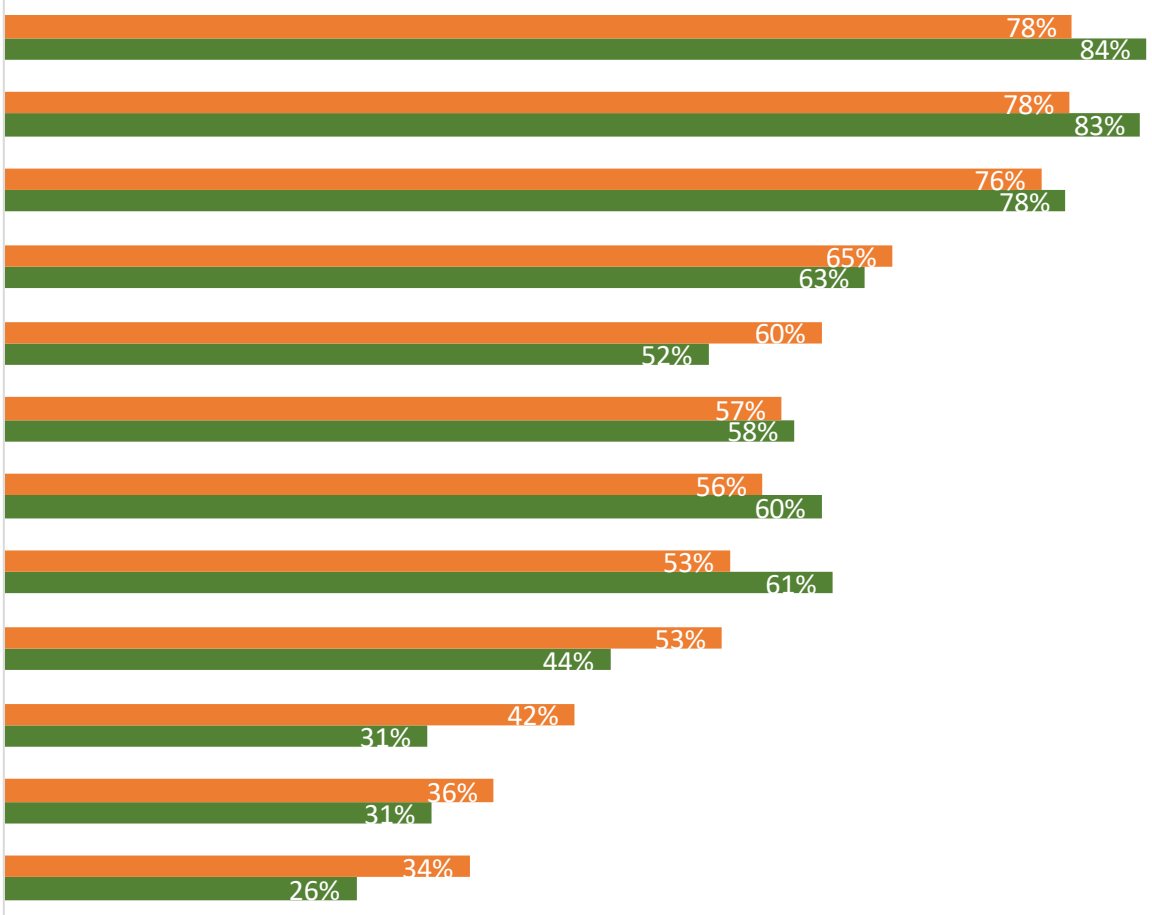


Pure Familiars are most differentiated from the average consumer through food-based characteristics, such as flavor and thickness

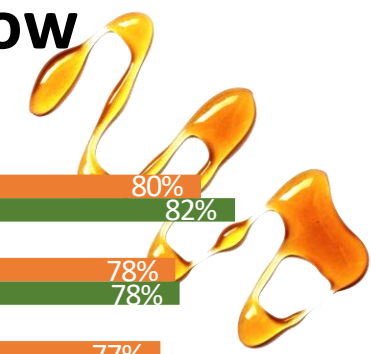


- I find the flavor of pure maple syrup to be more pleasing
- Pure maple syrup makes a great gift
- Pure maple syrup has more uses than table syrup
- Pure maple syrup is too expensive
- Table syrup is a staple in my household
- I buy both pure maple syrup and table syrup
- Once I tasted pure maple syrup, I stopped buying table syrup
- I always buy pure maple syrup over table syrup
- I prefer the thickness of table syrup
- I'm not sure I can tell the difference between table syrup and pure maple syrup
- Pure maple syrup is too sweet for me
- Pure maple syrup is not available to me

■ All consumers ■ Pure Familiars



Pure Familiars are quite similar to the general consumer, but they show stronger engagement with how they think about food

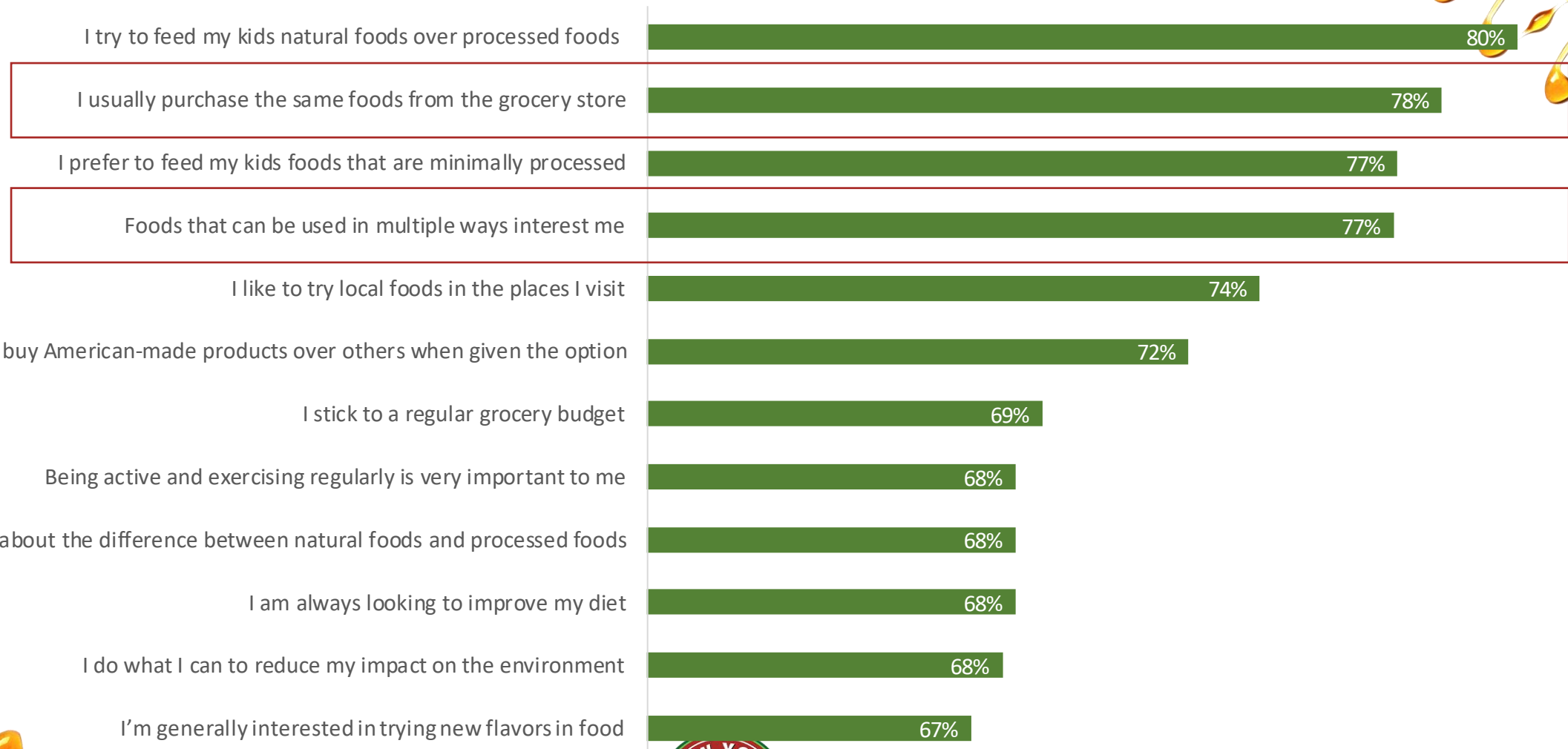
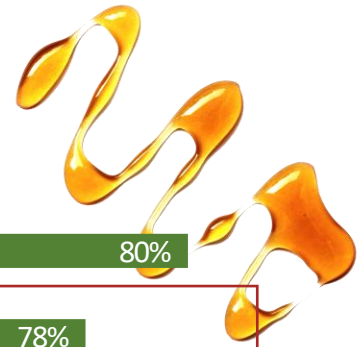


■ All Consumers ■ Pure Familiars

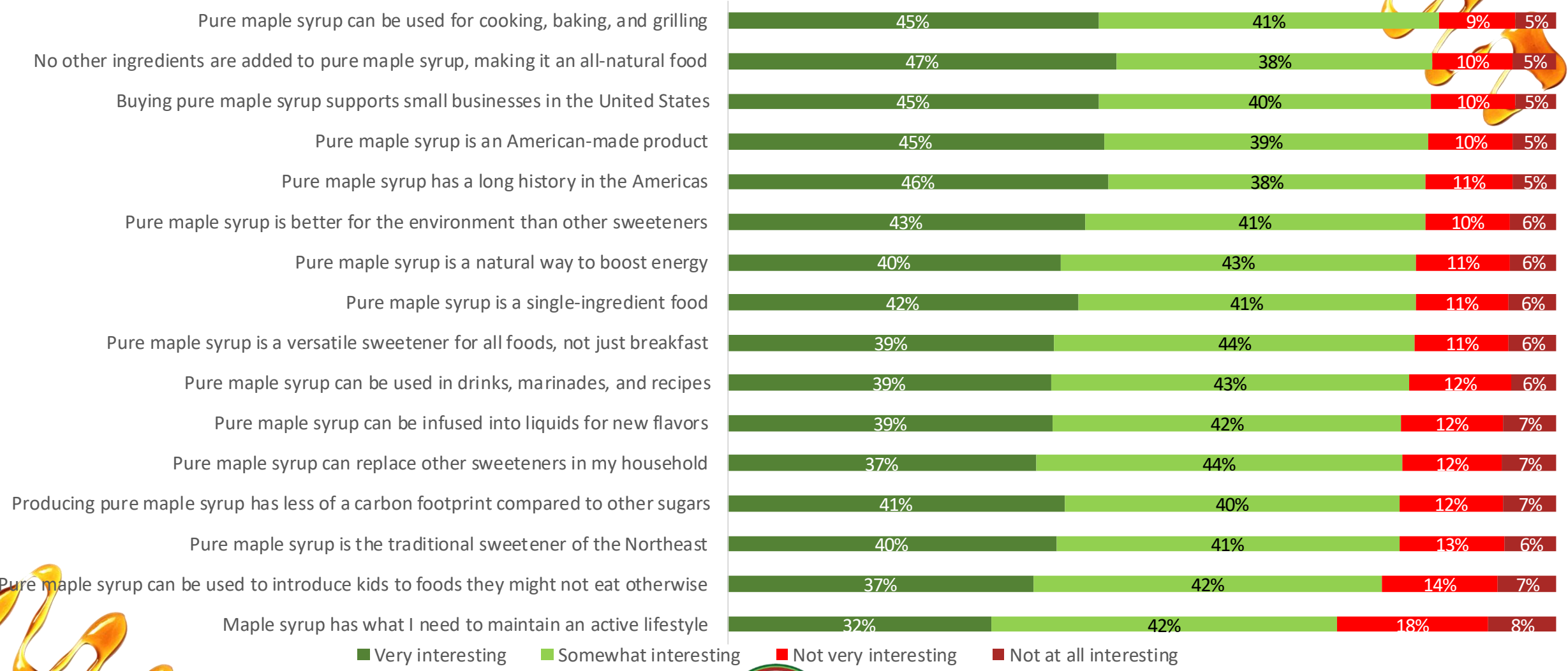
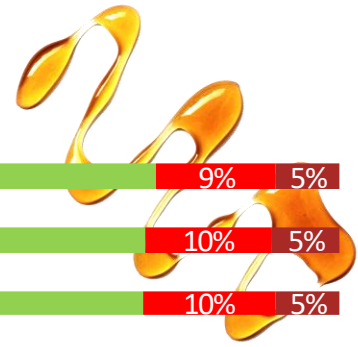
A close-up photograph of a wooden spoon filled with golden maple syrup, resting on a cross-section of a log. The background is a wooden surface with scattered autumn leaves in shades of red, orange, and yellow. The entire image has a soft, warm, reddish-orange color cast.

TALKING TO CONSUMERS ABOUT MAPLE

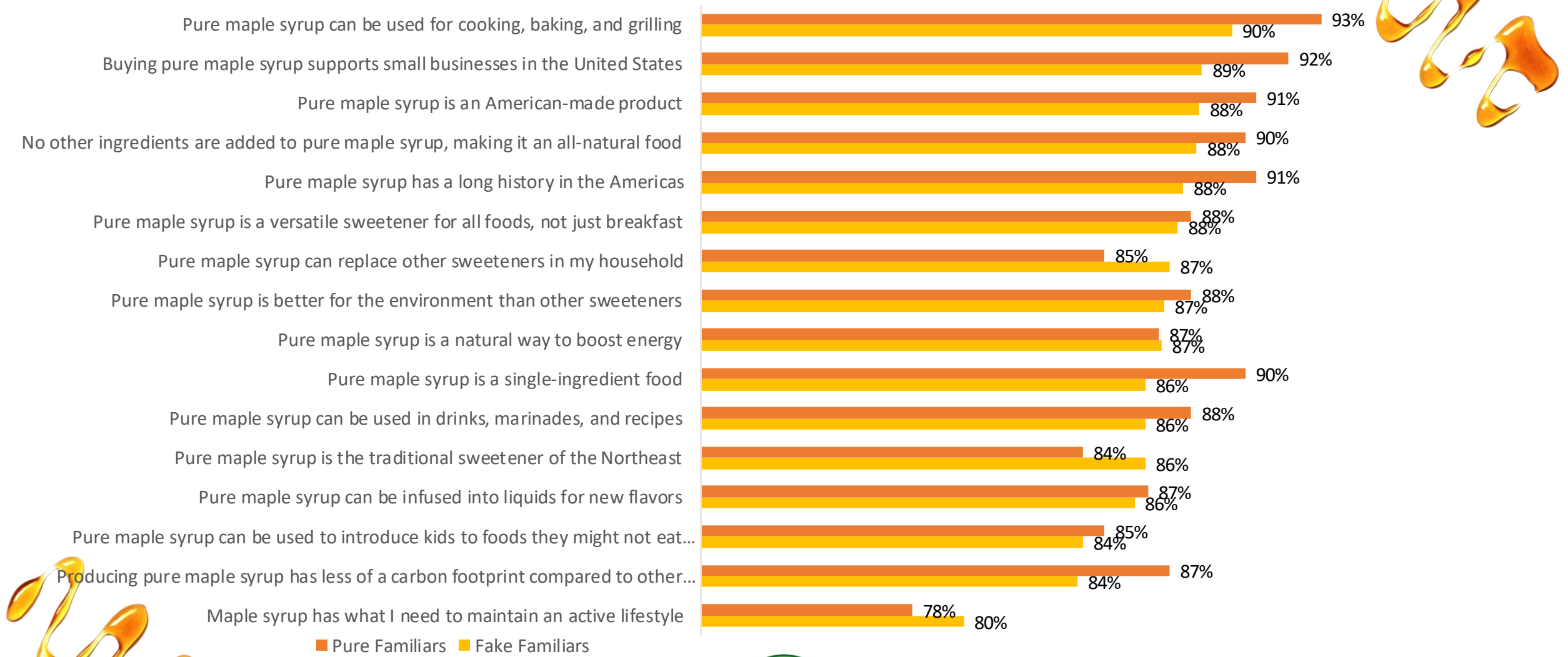
Consumers are creatures of habit and convenience



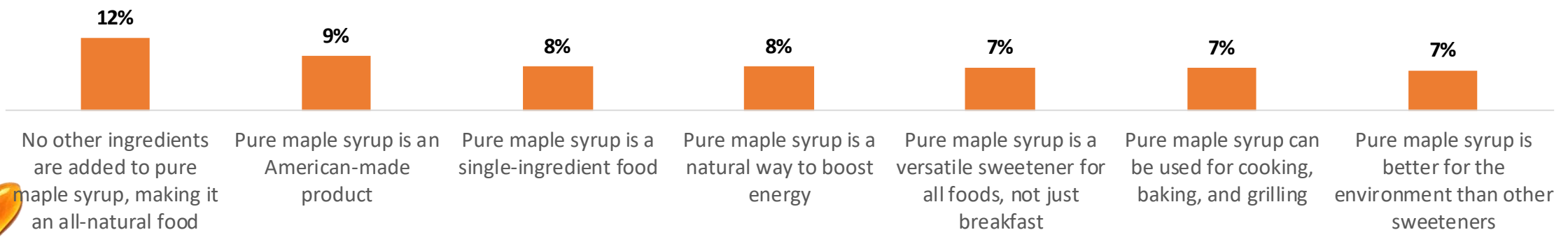
Speaking of versatility, the many uses of maple resonates with nearly everyone – and can be tied back to the convenience of using one food in multiple ways



There is very little difference between how the messaging is seen between Pure Familiars and Fake Familiars

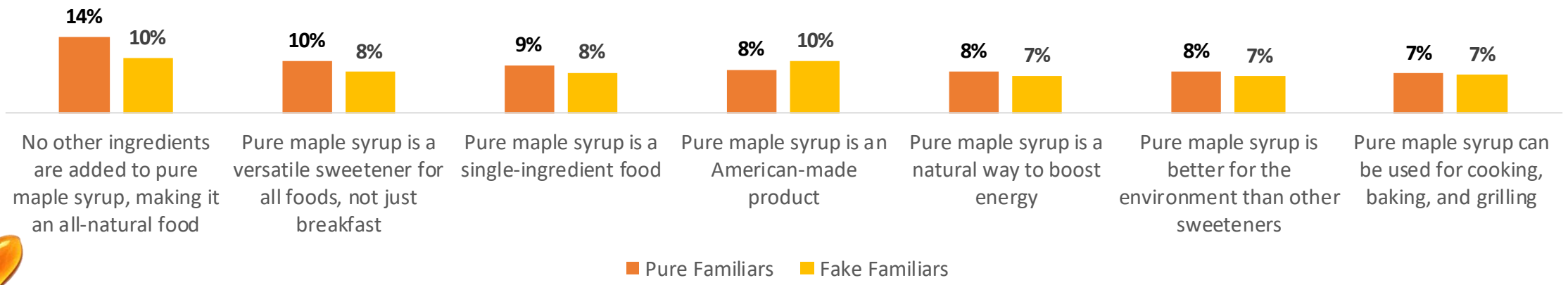


While consumers don't agree on what the most persuasive statements about maple are, maple as an ingredient ranks more highly as an overall theme than other statements

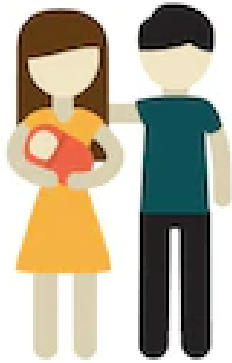


Q19. Of the statements that you found to be interesting, please select the statement that you find to be the most persuasive. n=1606

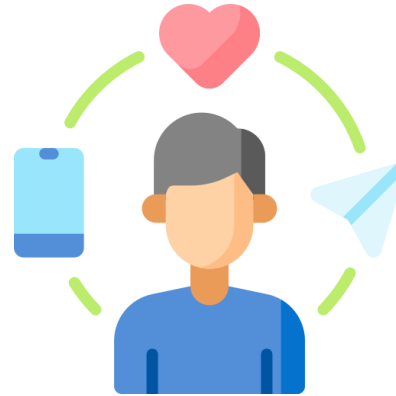
Much like interest levels, there is very little difference between Pure Familiars and Fake Familiars in what they agree is the most persuasive statement



There are opportunities to test different ways to talk about maple to specific segments.



Parents want to be good role models for their children, re: diet and enviro



Millennials are most receptive to expanding their palates, but are most likely to stick to their grocery budgets



Those who don't think it's expensive don't stick to a budget and are willing to pay more for high-quality foods



Where to Dig In

Attribution of "pure" to
imitation brands

The versatility theme

Messaging combinations to
persuade consumers

Flex on grocery budgets and
shopping habits

Building loyalty for pure

Feelings about imitation
syrup