NYSMPA Pilot Survey March 16, 2022









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.

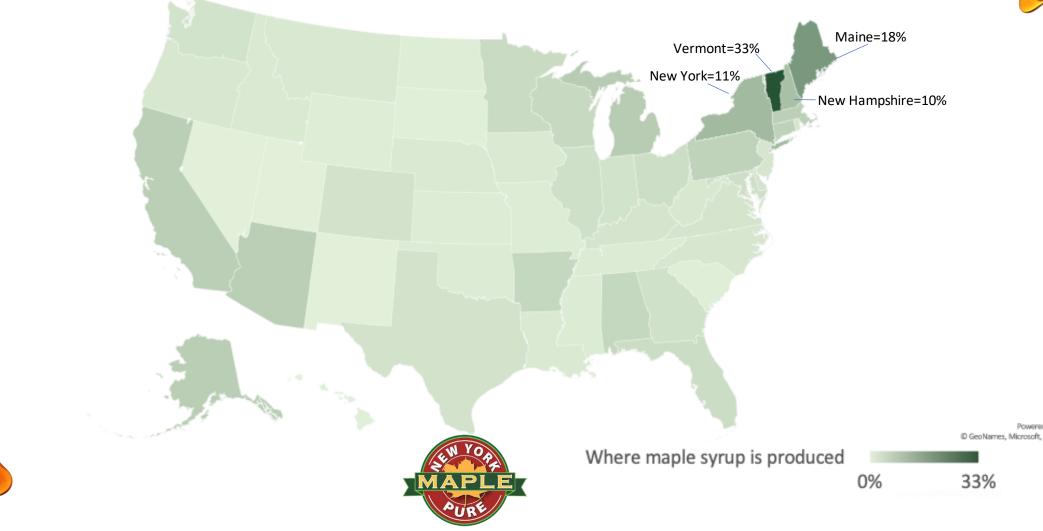
Cost cuts both ways. There is a group of Americans who don't believe that pure maple is too expensive; however, two thirds disagree with this and can pose a challenge.

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



Q5. Which countries produce maple syrup? Please select all that apply.? n=1684; Q6. Which states produce maple syrup? Please select all that apply. n=1356

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"

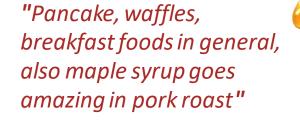
"real maple syrup versus the corn syrup-based pancake syrup that you buy at the supermarket"



"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"



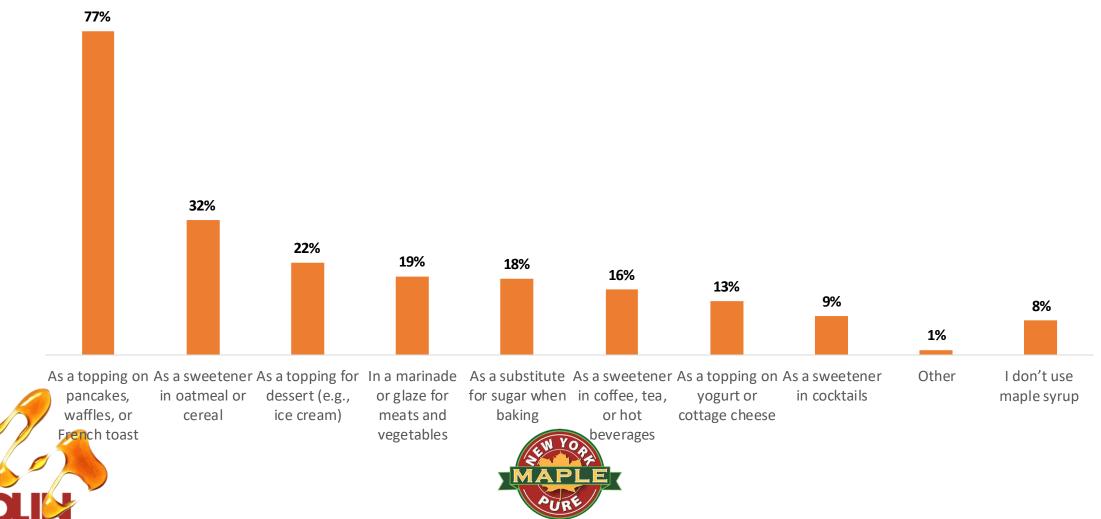
"A great sweetener if it's organic and not processed"

"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

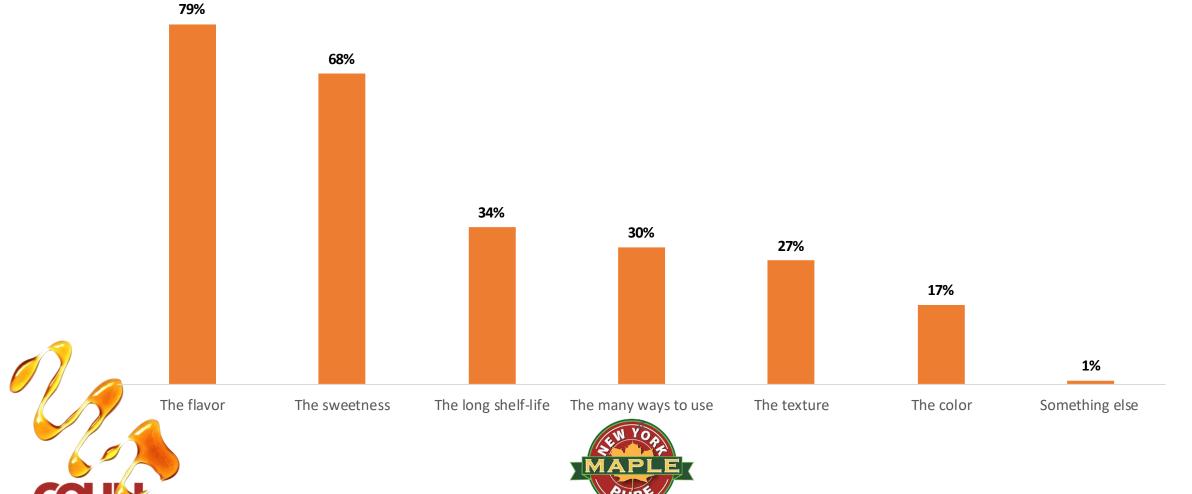
No surprise there!



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

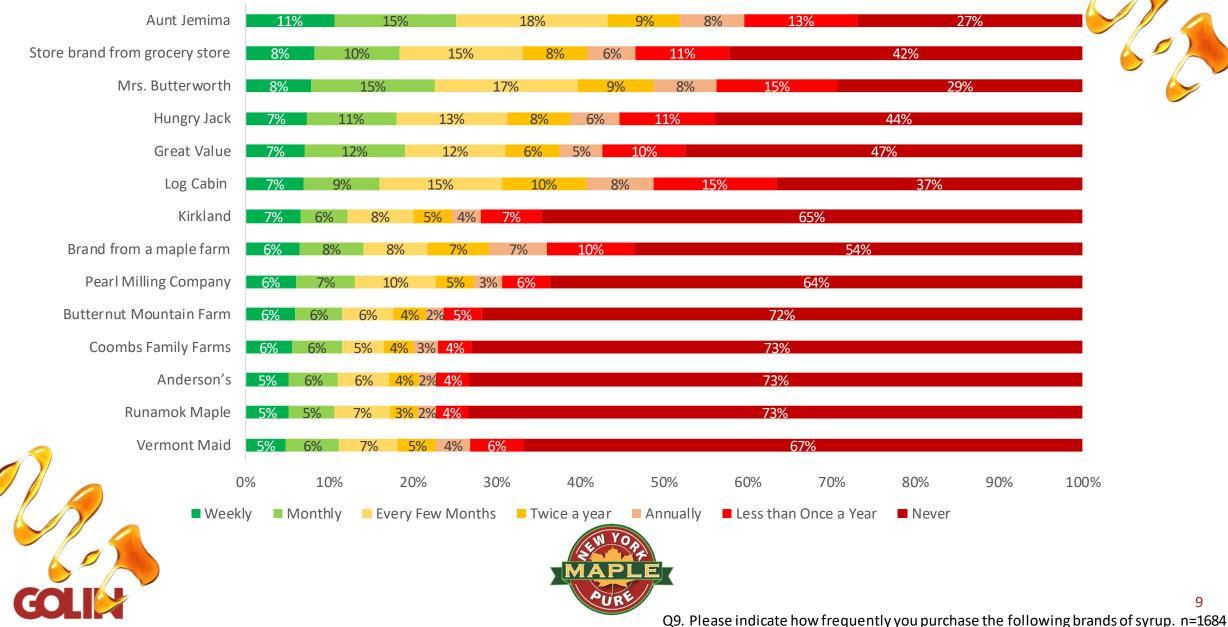


8

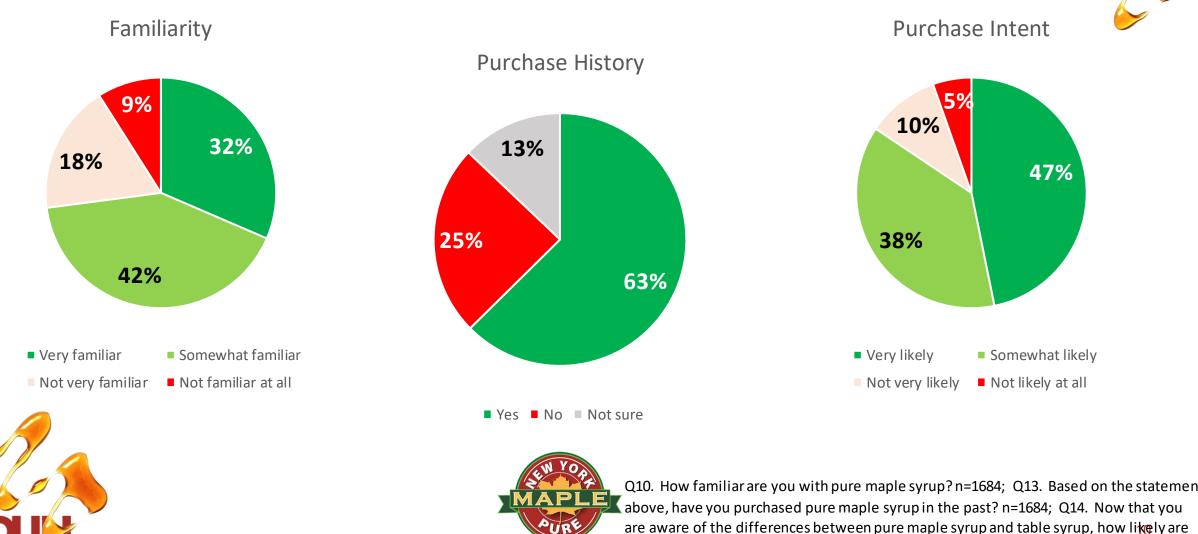


Q8. Please select up to three characteristics that you enjoy the most about maple syrup. n=1546

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



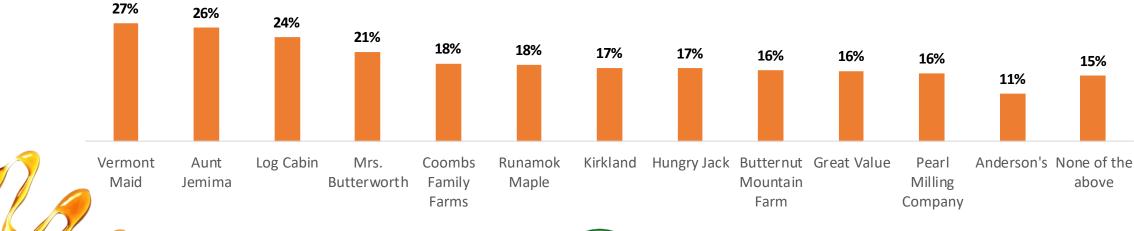
Overall, consumers appear to be familiar with pure maple. Nearly twothirds of consumers report having purchased pure maple, with even more expressing intent to purchase pure maple



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







Q11. Which of the following brands offer pure maple syrup? Select all that apply. n=1684

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

41%

Table syrup is less expensive than pure maple syrup Table syrup can be used as a sugar substitute in baking/cooking Table syrup has a different color from pure maple syrup Table syrup often does not contain pure maple syrup

Table syrup has the same thickness as pure maple syrup

Table syrup has the same nutritional value as pure maple syrup

Table syrup tastes the same as pure maple syrup

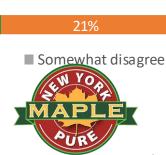
Table syrup is always packaged in a glass container

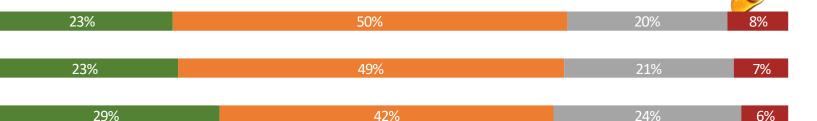
Table syrup has the same ingredients as pure maple syrup

Table syrup has no additives

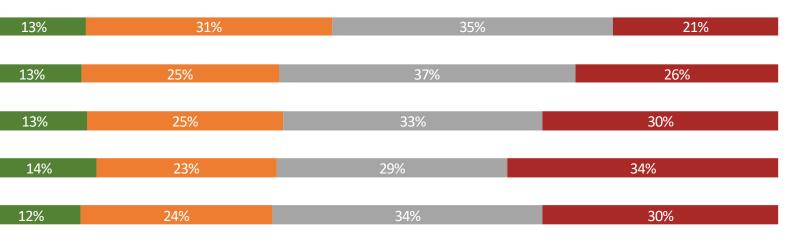
Strongly agree Somewhat agree

14%





40%



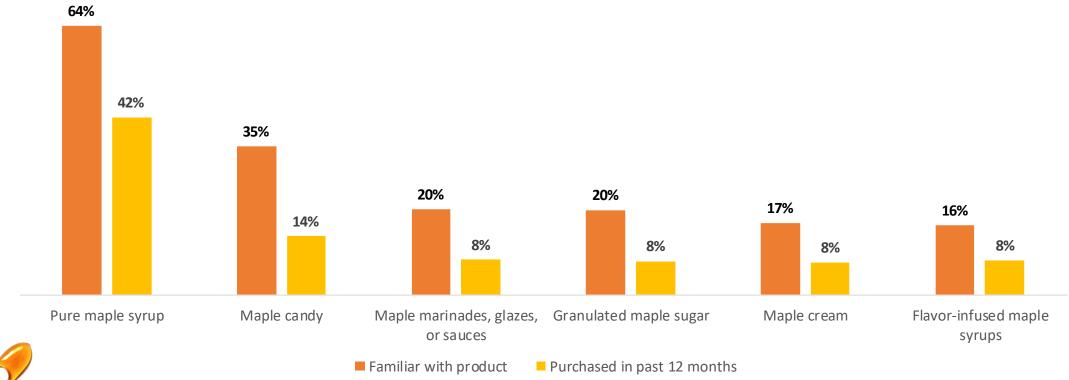
Strongly disagree

Q12. Please indicate how much you agree or disagree with the following statements. n=1684

14%

31%

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

From a grocery store	51%	93%	19%	n=530
From a farmers market	24%	89%	17%	n=253
From a local farm or producer	23%	86%	20%	n=241
From a specialty store	20%	80%	33%	n=211
From a big-box store (e.g., Costco or Sam's Club)	20%	83%	30%	n=210
From Amazon or other large online-only retailer	18%			
From a small business website	11%			
Other				
GOLIN	OURE			14

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.

Online

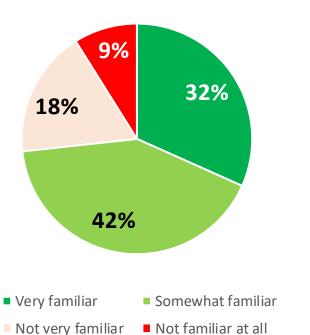
In-store



PURE FAMILIARS

Introducing... the Pure Familiar

Familiarity



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

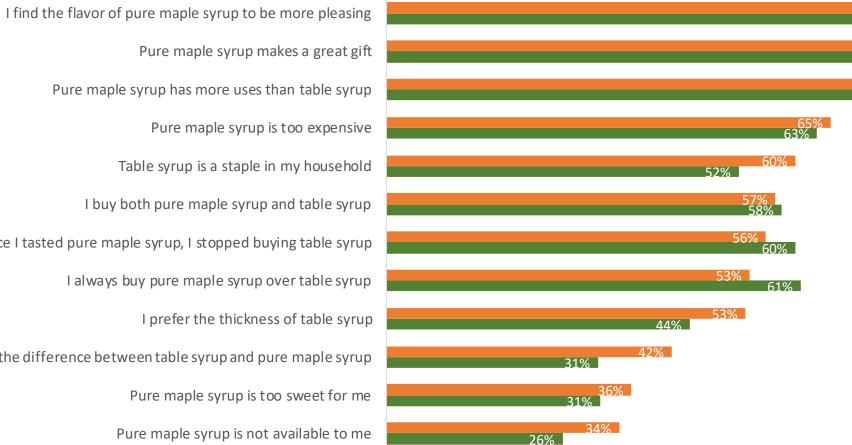


Use it more than just as a topping





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



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



Q15/Q16. Please indicate how much you agree or disagree with the following statements. n=1684

78%

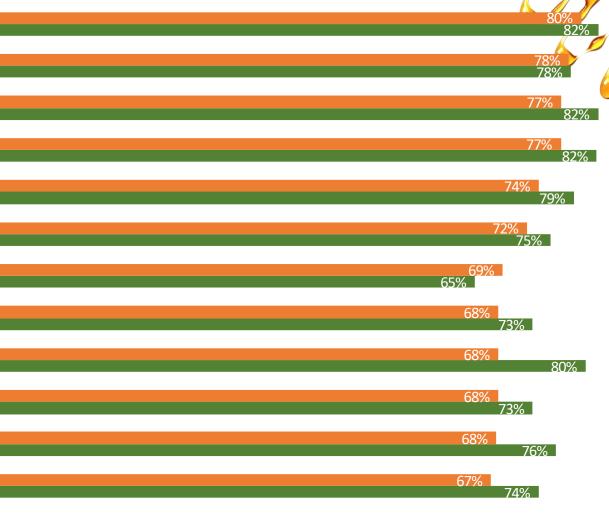
78%

76% 78%

84%

83%

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



All Consumers Pure Familiars

MAPLE

19 Q1/Q2/Q3. Please indicate how well the following statements describe you: n=1684

I try to feed my kids natural foods over processed foods I usually purchase the same foods from the grocery store I prefer to feed my kids foods that are minimally processed Foods that can be used in multiple ways interest me

I like to try local foods in the places I visit

I try to buy American-made products over others when given the option

I stick to a regular grocery budget

Being active and exercising regularly is very important to me

I am well educated about the difference between natural foods and processed foods

I am always looking to improve my diet

I do what I can to reduce my impact on the environment

I'm generally interested in trying new flavors in food



TALKING TO CONSUMERS ABOUT MAPLE

Consumers are creatures of habit and convenience

I try to feed my kids natural foods over processed foods

I usually purchase the same foods from the grocery store

I prefer to feed my kids foods that are minimally processed

Foods that can be used in multiple ways interest me

I like to try local foods in the places I visit

I try to buy American-made products over others when given the option

I stick to a regular grocery budget

Being active and exercising regularly is very important to me

I am well educated about the difference between natural foods and processed foods

I am always looking to improve my diet

I do what I can to reduce my impact on the environment

I'm generally interested in trying new flavors in food



80%

21

78%

77%

77%

74%

72%

69%

68%

68%

68%

68%

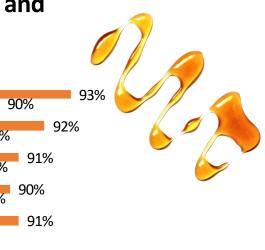
67%

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



Pure maple syrup can be used for cooking, baking, and grilling No other ingredients are added to pure maple syrup, making it an all-natural food Buying pure maple syrup supports small businesses in the United States Pure maple syrup is an American-made product Pure maple syrup has a long history in the Americas Pure maple syrup is better for the environment than other sweeteners Pure maple syrup is a natural way to boost energy Pure maple syrup is a single-ingredient food Pure maple syrup is a versatile sweetener for all foods, not just breakfast Pure maple syrup can be used in drinks, marinades, and recipes Pure maple syrup can be infused into liquids for new flavors Pure maple syrup can replace other sweeteners in my household Producing pure maple syrup has less of a carbon footprint compared to other sugars Pure maple syrup is the traditional sweetener of the Northeast maple syrup can be used to introduce kids to foods they might not eat otherwise Maple syrup has what I need to maintain an active lifestyle Somewhat interesting Very interesting

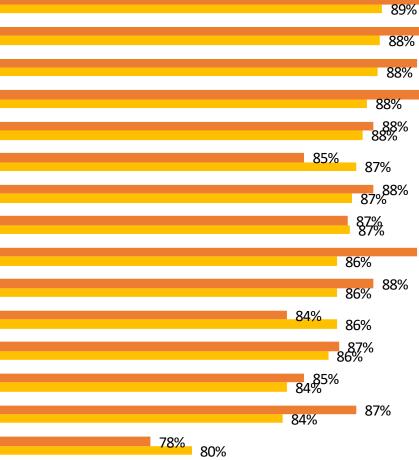
Q17/Q18. Please indicate how interesting each of these statements are to you regarding pure maple syrup. n=1684



90%

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

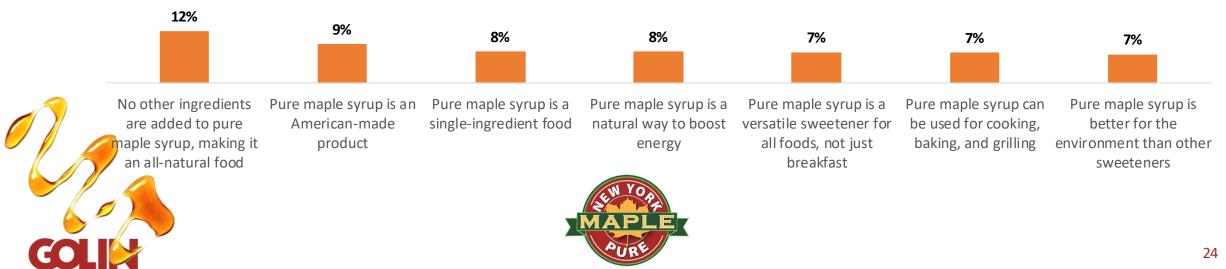
Pure maple syrup can be used for cooking, baking, and grilling Buying pure maple syrup supports small businesses in the United States Pure maple syrup is an American-made product No other ingredients are added to pure maple syrup, making it an all-natural food Pure maple syrup has a long history in the Americas Pure maple syrup is a versatile sweetener for all foods, not just breakfast Pure maple syrup can replace other sweeteners in my household Pure maple syrup is better for the environment than other sweeteners Pure maple syrup is a natural way to boost energy Pure maple syrup is a single-ingredient food Pure maple syrup can be used in drinks, marinades, and recipes Pure maple syrup is the traditional sweetener of the Northeast Pure maple syrup can be infused into liquids for new flavors Pure maple syrup can be used to introduce kids to foods they might not eat... Producing pure maple syrup has less of a carbon footprint compared to other... Maple syrup has what I need to maintain an active lifestyle Pure Familiars Fake Familiars





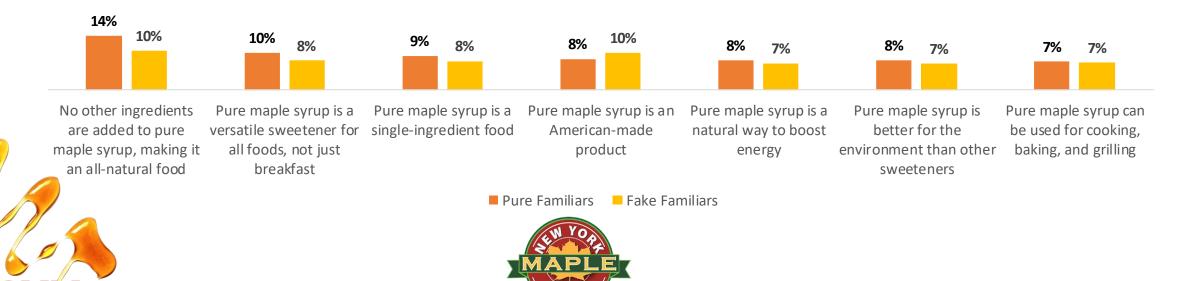
Q17/Q18. Please indicate how interesting each of these statements are to you regarding pure maple syrup. n=1684

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



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

25

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