

# ACER Research Findings – US Consumer Profile

Sponsored by NYS Maple Producers'  
Association and the NY Dept of  
Agriculture & Markets



## Methodologies

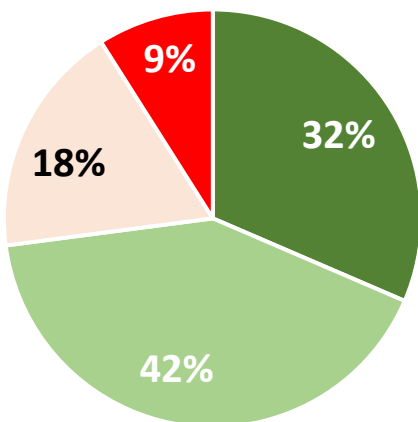
1. Golin, in partnership with NYSMPA, conducted two surveys:
  1. February 24 to March 4, 2022 among 1,684 Americans, ages 16+, in a nationally representative sample.
  2. August 11 to August 18, 2022 among 3,123 Americans, ages 16+, in a nationally representative sample.
2. Golin, in partnership with NYSMPA, facilitated focus groups across 6 markets: Boston, Atlanta, Dallas, LA, Seattle, and Minneapolis. There were 2 groups per market, split by age groups (GenX+ and Gen Z and Millennials). The groups were conducted from April 11 to 20, 2022.

A collection of glass bottles and jars of syrup and honey on a wooden surface against a warm orange background. From left to right: a small square glass bottle with a cork stopper; a medium-sized glass bottle with a black cap and a handle; a larger glass bottle with a yellow cap and a handle; a small glass jar with a gold lid; and a larger glass jar with a gold lid. A wooden honey dipper is placed horizontally across the jars. The background is a solid, warm orange color.

# Perceptions of Syrup – Pure and Imitation

# A majority claim to be familiar; most aren't

REPORTED FAMILIARITY WITH PURE MAPLE



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



PURE FAMILIARS  
15%



FAKE FAMILIARS  
59%



HONEST UNFAMILIARS  
26%



## Those who know the differences have commonalities



Gen X  
or older



Reside in the  
NE



Have a HHI of  
\$100K+

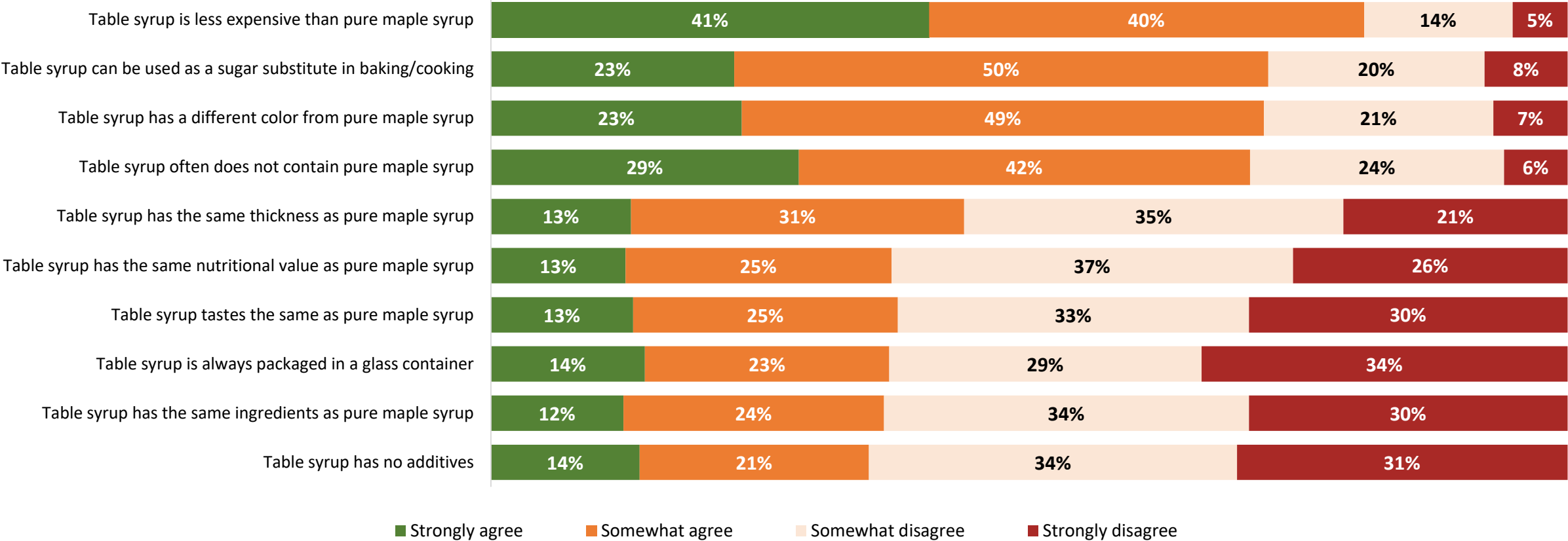


Have purchased  
pure maple syrup

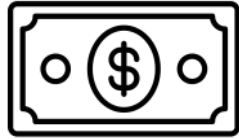


Use it more than just  
as a topping

# Knowledge of syrup is muddled



## With information, purchase intent is high



PURCHASED PURE MAPLE  
**63%**



[Table syrup] is artificial; it's making me think I need to switch over.



If you could find a nature's product like that, who wouldn't be willing to pay more? We're willing to pay more for organic.



LIKELY TO PURCHASE PURE MAPLE  
**85%**



I haven't had the pleasure of tasting pure maple syrup, but that sounds awesome.

# "Fake" label doesn't work



I probably would still go for the fake stuff because it tastes better and it's cheaper.



If you're telling me everything I had until now is fake, then I like the fake stuff.

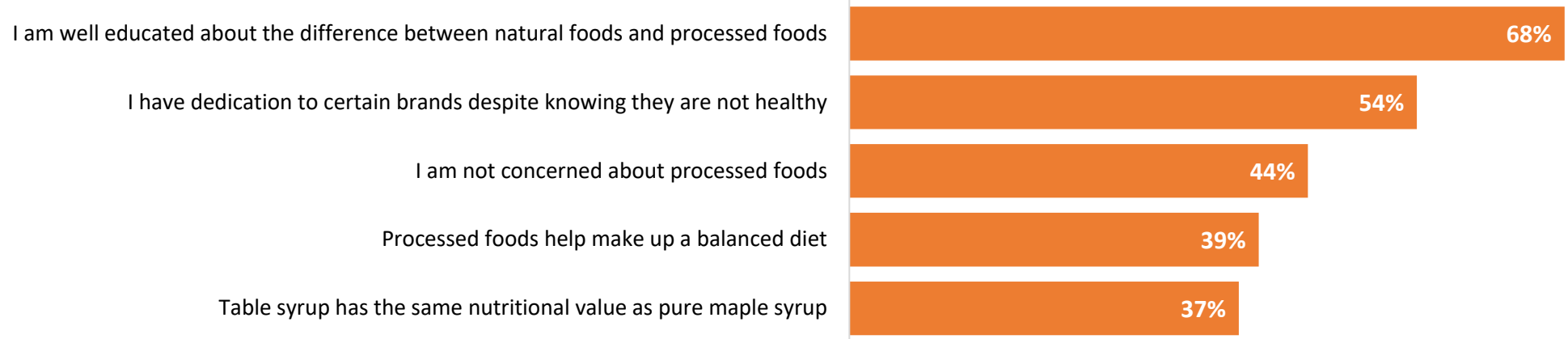


To me, it was real negative to call out 'fake stuff'. I don't feel that's necessary. Too much of our world is negative.





# Neither do "health" claims



I have these really young kids, so right now they're not thinking about healthy choices, they just want sugar.



Sugar is sugar.



Pure syrup is kind of interesting to me, but it feels like both real and not real syrup is going to be loaded with sugar either way.



# Challenges for Pure Maple



## CHALLENGE 1:

### Low awareness of differences



**38%** believe that table syrup tastes the same as pure maple syrup



**36%** believe that table syrup has the same ingredients as pure maple syrup



**30%** believe that table syrup contains pure maple syrup

“

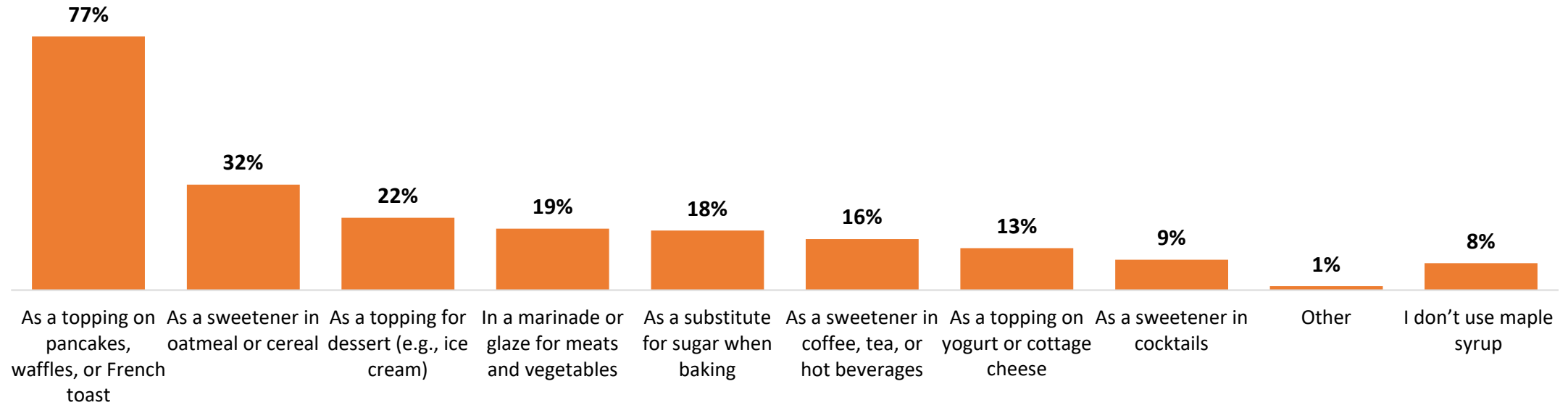
No wonder the price difference. I had no idea that there was no maple syrup, in table syrup.

“

I thought table syrup had some maple syrup, like real maple syrup in it, but it was just the manufacturing was cheaper.

## CHALLENGE 2:

### Low knowledge of uses



I'm not a very good cook, I don't enjoy it that much. Syrup is just for pancakes and waffles.



To be honest, I never really thought about using it in cooking.

## CHALLENGE 3:

### The price difference



81% believe that table syrup is less expensive than pure maple syrup



As far as a budget, I grew up with seeing my mom just grab a lot of generic items, having a big family. We always bought the cheaper items. So, it’s kind of embedded in me whether I like it or not.



65% believe that pure maple syrup is too expensive



Price was a huge factor, and pure maple syrup would fall into the splurge category or just something I didn’t get to have.



I remember a few months ago in Target, looking at the syrup because I wasn’t gonna go to Aldi that day. And I was looking at the high fructose corn syrup versus the maple syrup and just the price difference was unfathomable.

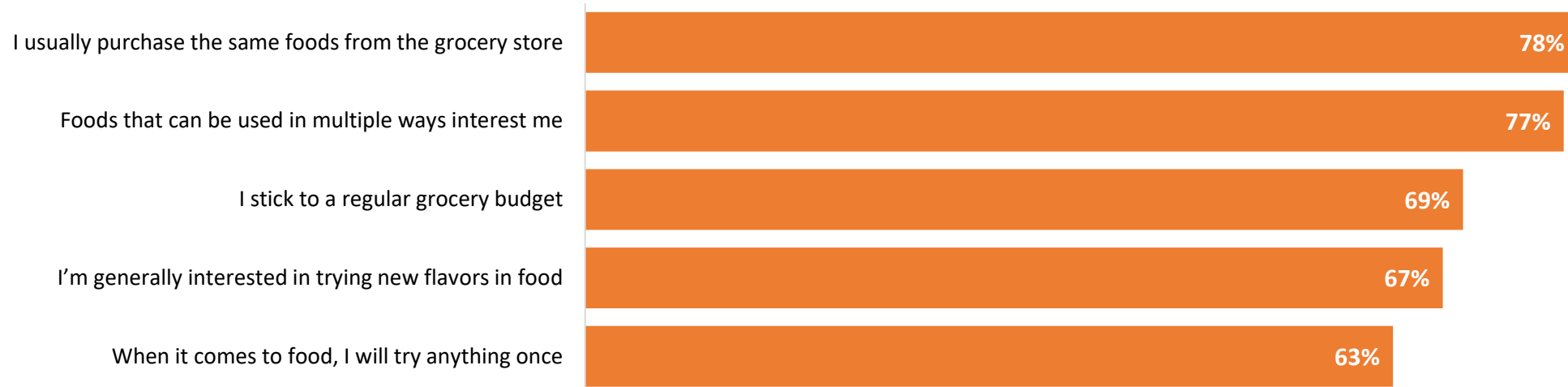
# Opportunities for Pure Maple





# OPPORTUNITY 1:

## Versatility



Interesting because I knew baking... but cooking and grilling, I'm thinking: what else could I do with this syrup?



I actually like that [the message] included versatility because in the last couple of years I have developed more knowledge of how to use it different ways.



# OPPORTUNITY 2: Single-ingredient



It's not artificial. It's not all the chemicals like the glucose, the high fructose corn syrup. It's just coming from the trees. The basics.



[Table syrup] is pretty gross in my opinion. Now that I think about it, it's like, what am I eating now? It's just a goop of 'who-knows-what.'



The idea that pure maple syrup is sourced directly from maple trees brings your authenticity to grilling, baking etc. I think that is just a true and real statement. It encourages or it enhances the idea that pure maple syrup is pure.



## OPPORTUNITY 3:

### Experimentation with new recipes



I save the real maple syrup for decadent times or in my marinades and stuff like that.



I like to try new things. People have called me a gourmet cook... I do have a tendency to look up and down [the grocery aisle] to see if there's anything that catches my eye.



I'm kind of like a mad scientist when it comes to cocktails. So I'll use it instead of a simple syrup or sugar. I'll make an old fashioned or I'll make some sort of smoked Manhattan with a little bit of smoked maple syrup.

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

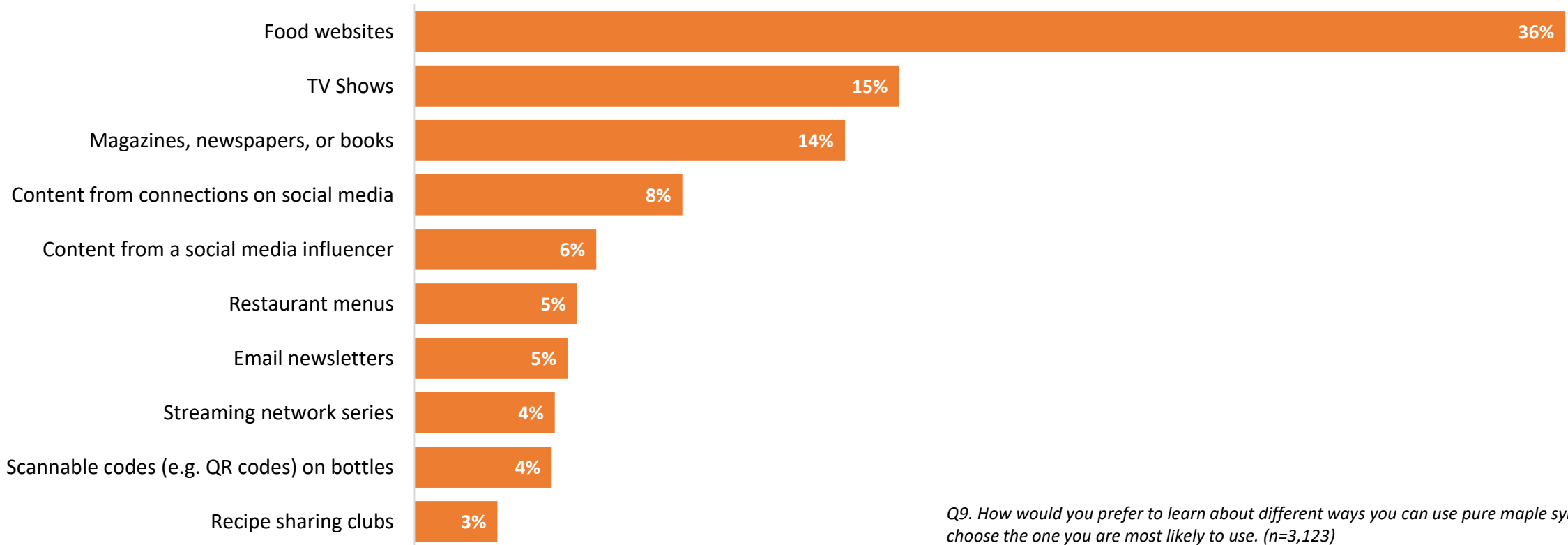
The only ingredient in each bottle is pure maple syrup.

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)*



# 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)





# Making a Case for a Label



# Why should maple consider using a label to indicate purity

- The average consumer is unaware that table syrup often does not contain any maple. They are misled by images on the packaging of table syrup such as sugar shacks and maple leaves, as well as other branding attributes, such as names like "Vermont Maid."
- Consumers default to visual stimulus to receive information about a product. Labels are used by three-quarters of consumers to make decisions about products they might purchase.
- When shown potential labels that could differentiate pure maple from other products, nearly all consumers found these labels to be useful to help them make decisions when they shop.
  - They were likely to purchase pure maple because they feel more informed.
  - They were also likely to remember a label differentiating pure maple from other similar products.



## Many of our focus group participants were misled by table syrup

“I feel educated. I felt like I learned something new. I am definitely just surprised at knowing how [table syrup producers] could put a product out and say that it's something and it actually isn't so.”

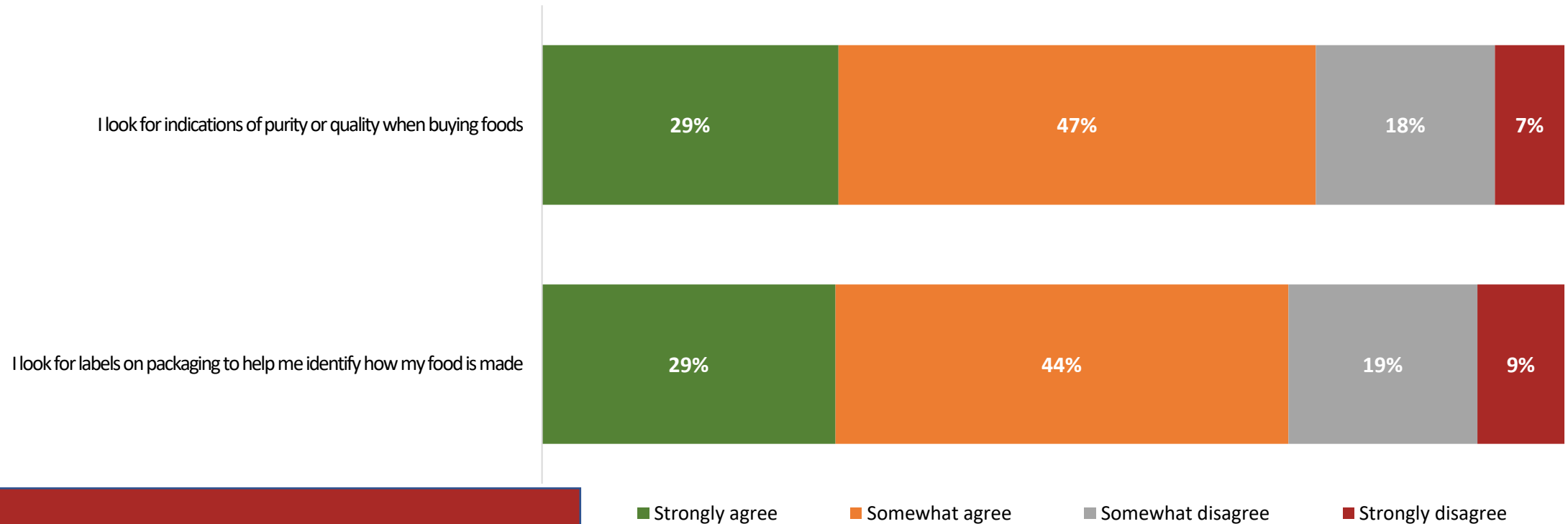
“It's unfortunate that [table syrup] is misleading because unfortunately not everybody actually knows what real maple syrup is. For me, it's not really being honest“

“I will call out one of them, which is the Log Cabin brand, because I always thought that they were showing the sugar shack on the little picture on the front. But now that I've grown up, I'm like, well, no, it's just a log cabin. But it always felt a little bit like under the radar... This is pure maple syrup. It comes from a log cabin in the middle of all of these trees that we tap.”

“I thought table syrup had some maple syrup, like real maple syrup in it, but it was just the manufacturing was cheaper. I knew they added stuff to it. Because it's not pure, but I didn't think it was.”



# Three-quarters of consumers look for some guidance to help them make decisions about the food they are buying.



Those who have an above average household income and are interested in food are more likely to strongly agree with these statements. They represent about one-quarter of consumers.



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



Labels were presented to consumers for reaction and assessment



Pure  Maple  
SINGLE INGREDIENT, ALL NATURAL



# A visual label to identifying pure maple products will help consumers find pure maple more easily and not be duped by table syrup, as well as encourage them to purchase pure maple

		
Most Liked	49%	34%
Useful	97%	95%
Purchase Influence	90%	91%
Memorable	84%	81%
Shareability	77%	80%
Informed	46%	45%

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)





## IMPLICATIONS

- 1** Fill the familiarity gap
- 2** Lean into the differences
- 3** Use positive information
- 4** Inspire the customer
- 5** Become recognizable and easy to find