

ACER Research Phase I Findings – US Consumer Profile

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



Methodologies

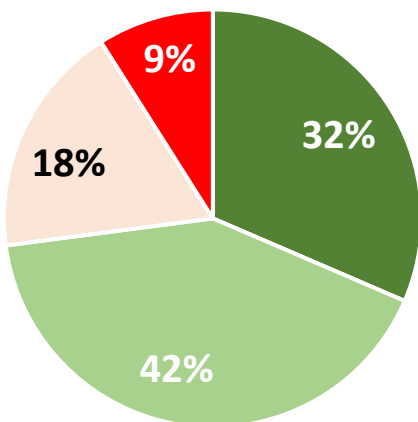
1. Golin, in partnership with NYSMPA, conducted a survey among 1,684 Americans in a nationally representative sample from February 24 to March 4, 2022
2. Golin, in partnership with NYSMPA, facilitated focus groups across 6 markets: Boston, Atlanta, Dallas, LA, Seattle, and Minneapolis. There were 2 groups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



**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+

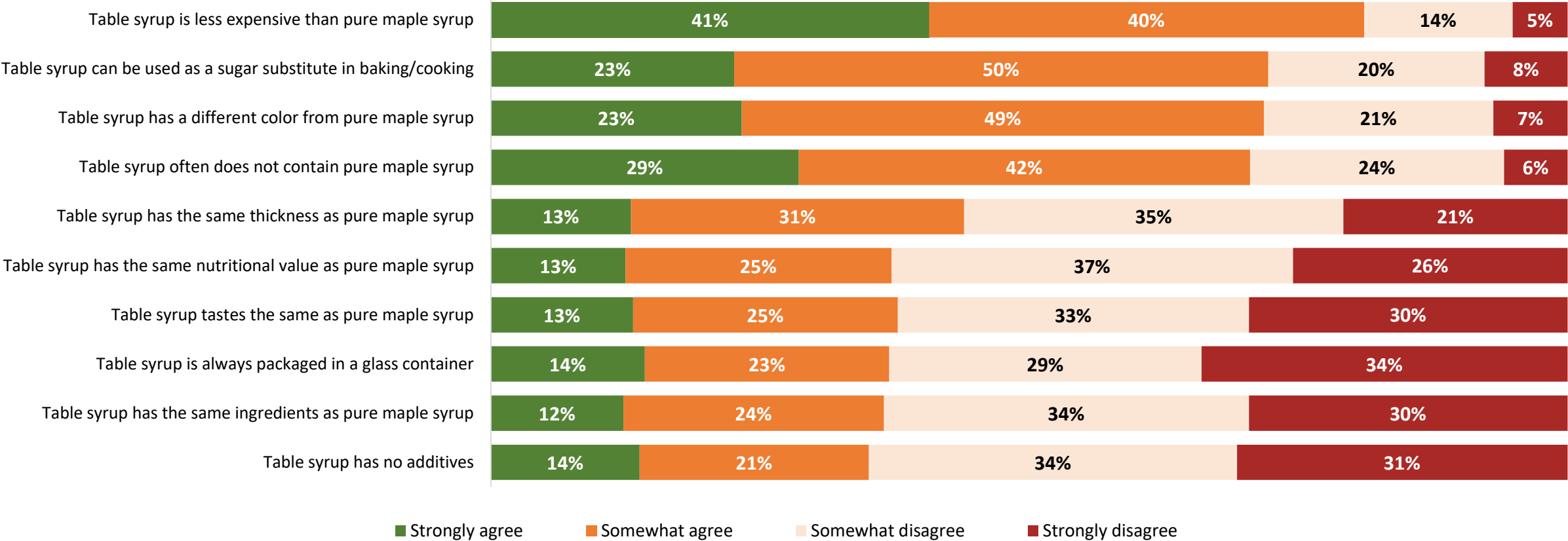


Have purchased
maple syrup

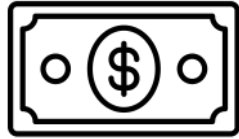


Use it more than just
as a topping

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.



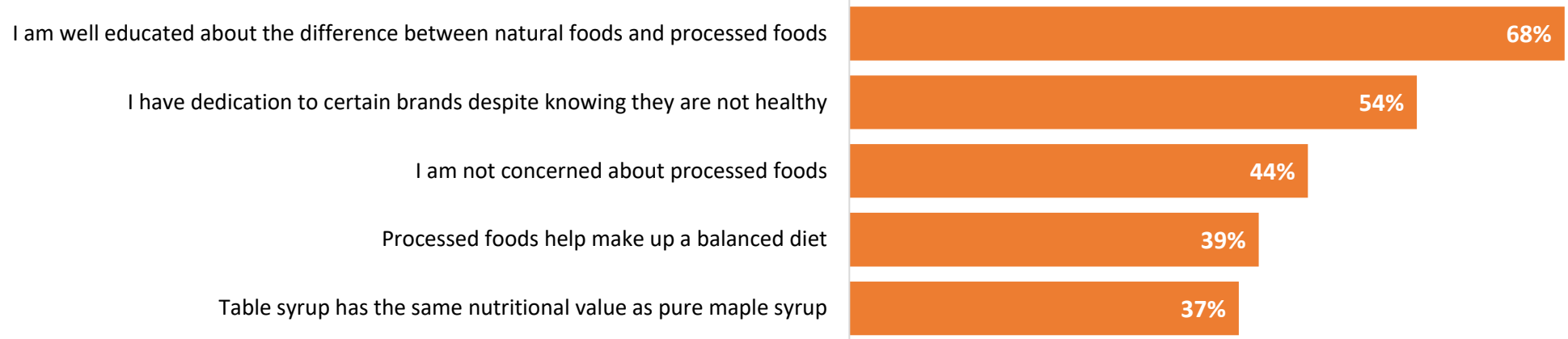
If you're telling me everything I had until now is fake, then I like the fake stuff.



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



"health" claims don't work either



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

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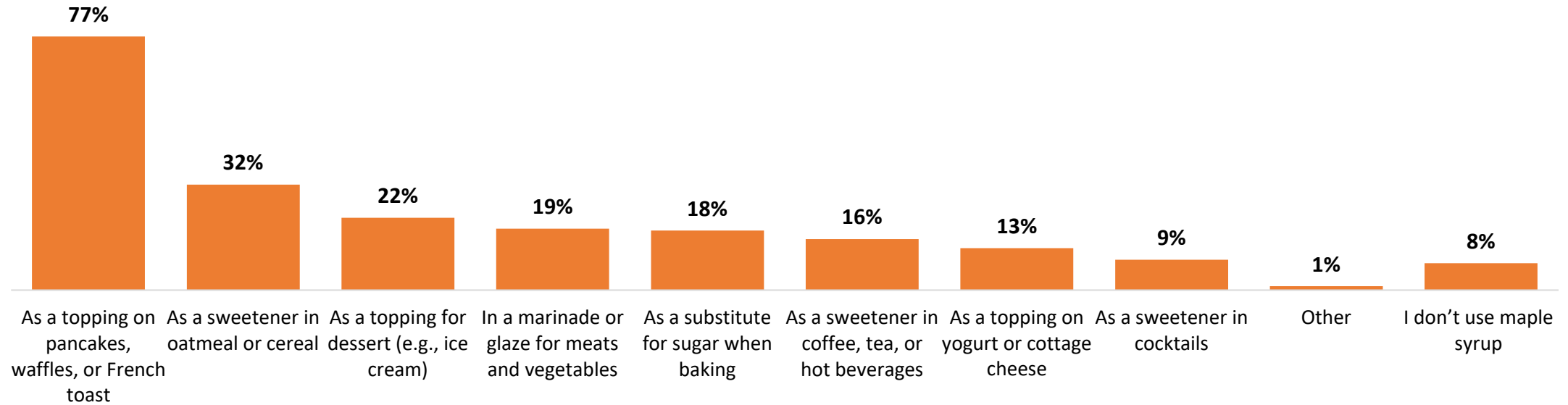
No wonder the price difference. I had no idea that there was no maple syrup, in table syrup.

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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 did always buy 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.



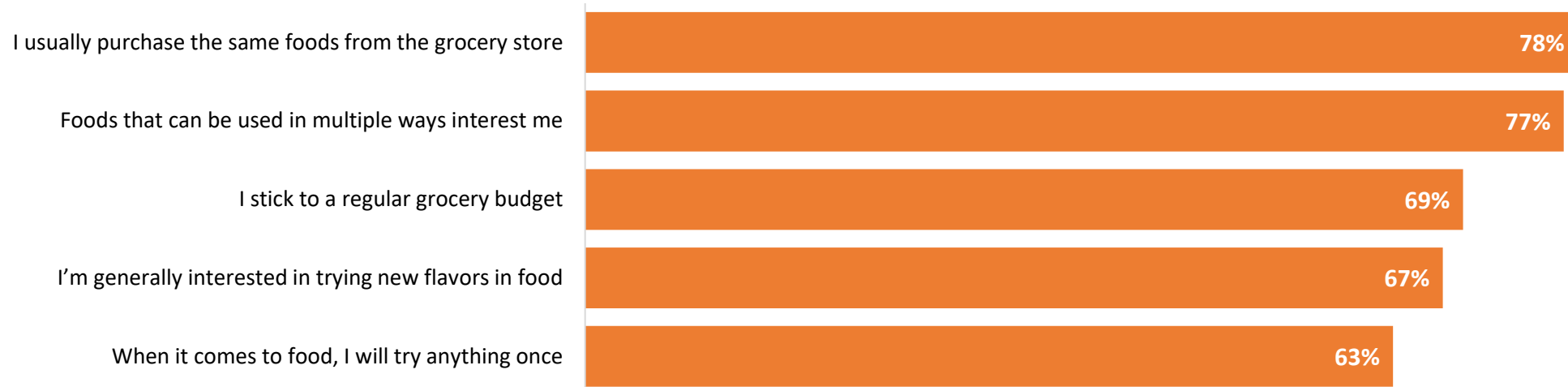
I remember a few months ago in Target, looking at the syrup because I wasn't gonna go to Aldi that day. And I was looking at the high fructose corn syrup versus the maple syrup and just the price difference was unfathomable.

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.

IMPLICATIONS

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



Next Steps

- 1. Quantitative Survey:** A quantitative survey validating the Golin strategic direction, refined consumer messaging and initial creative stimuli, **including a pure maple syrup mark**; survey to be fielded in Summer 2022.
- 2. Communications Plan:** A communications plan will be developed by Golin upon analysis of the final survey results. The plan will include recommended target audience, recommended ways of effectively reaching the target audience, recommended messaging as well as assets that can be easily implemented by NYMSPA and its members, such as social media messaging/content and the pure maple syrup mark.
- 3. Evaluation Framework:** Golin will provide some recommendations around program evaluation for consideration once the program implementation begins.