

NYSMPA Final Phase Research Findings

September 2023

GOLIN



Introduction and Methodology

This report is the product of a multi-stage mixed-methods research study that included in-depth analysis of U.S. consumer purchase behavior data, digital and traditional media consumption data, and several rounds of primary research.

Earlier this year we undertook survey research to understand how people who enjoy cooking (Food Discoverers) view Pure Maple Syrup. This yielded valuable insights around the Culinary Expressionists corner as a means of unlocking the larger Food Discoverer audience.

In contrast, our objective with the round detailed in this study was to understand the entirety of the U.S. consumer market and its relationship with Pure Maple Syrup and its broader category, Breakfast Syrups. We wanted to understand price sensitivity, occasion, marketing channels, relationships between Pure Maple use and income, how different value propositions might engage different audiences, and a variety of other questions.

To dig into these broad questions, we opted for a wide, consumer-data-driven approach: we used Interpublic Group's vast consumer data holdings to understand what distinguishes buyers of Pure Maple and Table Syrups based on their other purchase and lifestyle habits. These observations from a preliminary "basket affinity study" revealed the characteristic purchases and behaviors that distinguish Pure Maple familiars from Fake familiars from those who do not purchase in the category. But the basket affinity uncovered a rich diversity of identities lying behind the simple consumer "Pure Maple Familiar" and "Fake Familiar" labels. This led us to design and field a nationally-representative poll designed to dig into each of those consumer behaviors and understand the underlying audiences more richly. We used an AI-enhanced "anomaly detection" methodology to bucket poll respondents into the nine distinct groupings, which we describe in detail below.

Finally, we went back to the consumer data and for each audience we examined media consumption trends, advertising availability, and other lifestyle characteristics that helped bring color and life to each distinct group.

In total, this approach has yielded the most comprehensive and complete understanding of all American consumers and their relationship with Pure Maple products. We hope it enables Pure Maple producers to find more authentic and meaningful connection with these audiences, improving the breadth and frequency of consumption of Pure Maple products, and sustaining a proud industry for decades to come.



Report Overview

In this study of the American syrup buyer, the primary insight is one of profound diversity: many different consumers purchase different breakfast syrup products for very different reasons. And there are very few broad statements we can make about Pure Maple Familiars or Fake Familiars that hold true for even a slim majority of either group.

Our approach has revealed nine distinct audiences comprising all consumers that are each more directly-addressable by Pure Maple producers. Some couldn't be more different from each other. Pure Maple's two most-loyal audiences are near-opposites except for their shared love of Pure Maple Syrup: one group is mostly older lower-income women with no children, who never touch alcohol and watch a lot of TV, the other is mostly younger higher-income men with families who are wine, beer, and whiskey connoisseurs and rarely watch TV. Pure Maple appeals to both for very different reasons, and engagement programs aimed at each will look very different.

This report begins with high-level analysis of consumer traits distinguishing Pure Maple Familiars and Fake Familiars and then explores each of the nine constituent audiences that together comprise the U.S. consumer market. Each audience section includes a description of their unique profile, media preferences, verbatim responses to open-ended survey questions, and a set of strategic concepts our team developed as thought-starters for marketing and communications efforts to reach them. It continues with an overview of all program and experience concepts, and finally concludes with a sample measurement framework.



Business Challenge

Overall, 56% of respondents said they keep some Pure Maple products in their homes. By contrast, relatively few consumers (18%) keep only table syrup at home, suggesting most consumers using the Breakfast Syrup category perceive distinction between Table and Pure Maple products.




	Does Not Buy Table Syrup	Buys Table Syrup
Does Not Buy Maple Syrup	No-Syrup: 26% of U.S.	Table-Only: 18% of U.S.
Buys Maple Syrup	Maple-Only: 27% of U.S.	Syrup-Agnostic: 29% of U.S.

*Golin survey conducted 9/10-12/2023, n=935, nationally-representative

Business Challenge

Our overall goal is to cause those who aren't currently purchasing Pure Maple to do so, and to improve purchase frequency among those who are already Pure Maple buyers.

(to move audiences towards the bottom-left box in the purchase quadrant chart below):

	Does Not Buy Table Syrup	Buys Table Syrup
Does Not Buy Maple Syrup	 No-Syrup: 26% of U.S.	 Table-Only: 18% of U.S.
Buys Maple Syrup	Maple-Only: 27% of U.S.	 Syrup-Agnostic: 29% of U.S.

*Golin survey conducted 9/10-12/2023, n=935, nationally-representative





Basket Affinity Study - Overview

In August, Golin ran a “basket affinity study” to understand the unique purchase and lifestyle behavior markers most strongly-correlated to buyers of Pure Maple Syrup, Table Syrup, and those who buy neither.

This analysis relied on Acxiom’s Consumer Data Warehouse, an opt-in database containing decades of purchase and lifestyle behavior data on 220 million American households. This data is anonymized so researchers are blind to the identities and personal details of individual purchasers but can study relationships among characteristics of the purchasers and the items they buy (or don’t buy).



Basket Affinity Study – Key Findings

	Does Not Buy Table Syrup	Buys Table Syrup
Does Not Buy Pure Maple Syrup	<p>Demographics:</p> <ul style="list-style-type: none"> Age: Varies, but often between 25-34 and over 55 Gender: Slightly more male Location: West Coast, largest cities Education: College and graduate school + Income: Over \$250,000 household income Marital Status: Often single or divorced Ethnicity: Diverse, with a higher likelihood of identifying as Asian, more likely to speak Spanish at home Household: No children, often living in condos or apartments <p>Lifestyle and Interests:</p> <ul style="list-style-type: none"> Health-Conscious and Holistic Eco-Friendly and Environmentally Aware Open-Minded and Optimistic but socially-isolated and dissatisfied with life Passionate About Art, Culture, and International Events Active and Enthusiastic About Wellness Proponent of Alternative Medicine and Nutrition Active in Protests and Social Causes Favors Quality and Authenticity in Food and Products Adventurous vacationer <p>Shopping Preferences:</p> <ul style="list-style-type: none"> Shops at Ethnic Groceries, Trader Joe's, Whole Foods, Costco, Nordstrom Internet-Savvy Shopper, Especially for Nutrition Information Pays Attention to Airport Ads Prefers Environmentally-Friendly and Organic Products Enjoys Gourmet and Spices in Cooking Values Recycled and Sustainable Products <p>Media and Entertainment:</p> <ul style="list-style-type: none"> Reads: The Week, The Atlantic, The Economist, New York Magazine, The New Yorker, Smithsonian, Travel & Leisure Rejects TV Advertising and catalogs, prefers Internet Active on Social Media for Sharing Knowledge and Environmental Awareness Engages in Unconventional TV and Movie Preferences Early tech adopter 	<p>Demographics:</p> <ul style="list-style-type: none"> Age: Varied, with a presence across age groups Gender: Varied, with a slight female preference Location: Nationwide Education: Diverse educational backgrounds Income: Varied income levels Marital Status: Varied marital statuses Household: Varies, often with children <p>Lifestyle and Interests:</p> <ul style="list-style-type: none"> Traditional and Classic Taste Values Breakfast Traditions Likely to Be PTA and Church Members Engages in Sports and Outdoor Activities Enjoys Collecting Antiques and Reading Classic Literature Eats a lot of fast food Less likely to eat healthy More likely to experience health issues Less likely to vote <p>Shopping Preferences:</p> <ul style="list-style-type: none"> Shops at Various Retailers, Including Target, Walmart, Home Depot Coupons and Offers Receptive Enjoys Groceries, Breakfast Items, and Home Improvement Shopping Moderately Environmentally Conscious Much more price-sensitive <p>Media and Entertainment:</p> <ul style="list-style-type: none"> Enjoys a Range of Books and Magazines Watches TV Advertising Engages in Traditional Media Consumption
Buys Pure Maple Syrup	<p>Demographics:</p> <ul style="list-style-type: none"> Age: Varied, with a presence across age groups Gender: Varied, with a slight female preference Location: Nationwide Education: Diverse educational backgrounds Income: Varied income levels, more likely \$100k+ Marital Status: Varied marital statuses Household: Varies, often with children Likely in Professional/Scientific/Technical careers <p>Lifestyle and Interests:</p> <ul style="list-style-type: none"> Appreciates Authentic and High-Quality Flavors Values Organic and Natural Foods Enjoys Breakfast Traditions, Especially <u>Organic Eggs</u> Health-Conscious and Holistic, Non-smokers Politically Left-of-Center, most often Independents, but many identify as either Republican or Democrat Environmentally Conscious and Eco-Friendly Active, Engages in Outdoor Activities Interested in International Travel <p>Shopping Preferences:</p> <ul style="list-style-type: none"> High credit score Shops at Various Retailers, Including Costco, Whole Foods, and Nordstrom Environmentally Conscious Shopping Habits Open to Quality and Organic Products Drinks alcohol, especially imported wines, scotch Shops at Ethnic groceries Open to energy drinks and shots, but not soft drinks May prefer Light/Reduced-Calorie Maple-flavored Syrup More likely to be homeowners <p>Media and Entertainment:</p> <ul style="list-style-type: none"> Enjoys Reading a Variety of Books and Magazines on paper and tablets/e-readers Watches TV Advertising Actively Engages with Environmental and Health Information 	<p>Demographics:</p> <ul style="list-style-type: none"> Age: Varied, with a presence across age groups Gender: Varied, with a slight female preference Location: Nationwide Education: Diverse educational backgrounds Income: Varied income levels Marital Status: Varied marital statuses Household: Varies, often with children <p>Lifestyle and Interests:</p> <ul style="list-style-type: none"> Enjoys a Variety of Syrups, Both Table and Pure Maple Balanced Approach to Syrup Preferences Engages in Outdoor Activities and Sports Enjoys Cooking and Dining Out Enjoys baking Values Classic and Modern Flavors Environmentally and Health-Conscious More likely to be a Democrat or slightly less often a Republican, even less Independent Enjoys a diverse range of hobbies <p>Shopping Preferences:</p> <ul style="list-style-type: none"> Shops at Various Retailers, Including Costco, Target, and Walmart Open to a Range of Products and Offers Environmentally and Health-Conscious Shopping Habits Many prefer Light/Reduced-Calorie Maple-flavored Syrup for regular consumption but also keep Pure Maple Syrup <p>Media and Entertainment:</p> <ul style="list-style-type: none"> Enjoys a Mix of Books and Magazines Engages with Various Forms of Advertising Adopts a Balanced Approach to Media Consumption



Understanding Drivers

Underlying each consumer behavior quadrant are a separate set of behaviors, values, and opportunities we can tap to advance our business goals. Overall, nine constituencies coalesced from analysis of the entire U.S. consumer audience. None showed a strong preference for Table syrup:

MAPLE PREFERENCE

“Sober Locavore SINKs”
13% of US

“Wine Snobs”
10% of US

“Pure Maple Purists”
8% of US

MAPLE AND TABLE

“Syrup Explorers”
16% of US

“Conventional Sweets”
14% of US

“Organic Healthy Habits”
9% of US

“Conventional Healthy Habits”
7% of US

DOES NOT KEEP SYRUP

“Sober City SINKs”
16% of US

“Simple Starters”
7% of US

*Golin survey conducted 9/10-12/2023, n=935, nationally-representative



AUDIENCES

Maple Preference Audiences



Sober Locavore SINKs*

(*Single Income No Kids)

Sober Locavore SINKs – Audience Summary

13% of U.S. | 64% Female | 68% over age 45 | Lower-Income

Sober Locavore SINKs:	% Does not keep Table Syrup	% Keeps Table Syrup
% Does not keep Maple Syrup	14%	17%
% Keeps Maple Syrup	36%	33%



Sober Locavore SINKs – Audience Summary



How Price-Sensitive are they?

This audience is moderately price-sensitive in general around food. But they are committed to supporting local agriculture and strongly prefer Pure Maple.

Product Attributes and Occasions?

Despite being avid bakers and home cooks, their use of Pure Maple products remains mainly as a breakfast condiment.

Where do they buy?

In-person at grocery stores, farm stands, farmers' markets.

How do we advertise to them?

Radio, TV, print news, and out-of-home channels have best reach to this audience. They are least-likely to see online ads.

Sober Locavore SINKs – Detailed Profile

13%
of the U.S. are in this group

69% of them keep Pure Maple Syrup at home

17% keep only Table

14% say they keep no Breakfast syrups at all



Sober Locavore SINKs – Detailed Profile

WHAT MAKES THEM UNIQUE:

The sober locavore SINKs overall are distinctive because they don't drink alcohol, they show a strong connection to local agriculture, and are much more likely to live in or head single-income with no kids (SINK) households. Much more likely to be women (64%) with no children (79%), low-to-average-income (64% under \$50k), aged 45+ (68%), living alone (58%), homemaker if co-habiting, unemployed, or disabled. Consider themselves more pessimistic.

Moderately price-sensitive shoppers. Visits farmers markets and grocery stores when they can, but do not shop online. More likely to say they don't have access to Pure Maple Syrup where they shop. Dislikes artificial products. Cares for the environment and thinks doing so is good for business but won't spend more for environmentally-sound products.

Moderate preference towards organic/natural products but significant and consistent preference for supporting local agriculture across all product categories (eggs, dairy, produce, meats). Does not equate local food with lower carbon footprint, source knowledge, or healthfulness. Thinks understanding nature is important. Thinks Pure Maple Syrup should have a subsidy (like be WIC-eligible), but do not vote and are not politically active.

Rarely imbibes alcohol. Enjoys baking, thinks flavor is as important as healthiness in food. Less likely to be managing their diet or exercising regularly, says they are not in control of their weight. Feels guilty after eating sweets. Likes the trend towards healthier fast food.

Says they are comfortable being unconventional. Experiences “existential book angst.”

Does not prefer flavored or low-calorie breakfast syrups. Has used Pure Maple for non-breakfast occasions but prefers its breakfast application. Consider Pure Maple Syrup an “expensive treat”



Sober Locavore SINKs – Advertising Openness

How to Reach Them with Advertising by Channel:

- Primetime TV (33% reach, 1.6x average) – trusts most
- Radio (29% reach, 1.4x average)
- Out of Home (28% reach, 1.1x average)
- Magazine (25% reach, 1.4x average) – trusts 2nd most
- Newspaper (25% reach, 1.4x average)
- Cell Phone (23% reach, 0.8x) average
- Daytime TV (22% reach, 2.3x average) – trusts most
- Internet (17% reach, 0.9x average): streaming TV and mobile apps are most productive

Most-Frequented Content Sites:

- Facebook
- YouTube
- Instagram
- Pinterest
- LinkedIn
- Twitter
- TikTok

Sober Locavore SINKs in their own words

How can Pure Maple Sugarmakers get more people like you to buy their products?

Maybe introduce recipes for these syrups or different flavors. An influencer might help get it off the ground.

I think that with the right ploy of marketing, maybe through discovery channel perhaps they could make their story and process more widely known.

More information needs to be put out to educate people on the differences. And, regular syrup producers should not put the fake stuff out there.

Support American farmers.

The government helping more with the environment

I would start a campaign to educate people how the syrup is made. A website. Online videos. Have someone write a short book (something simple so that children can follow it if they want) that shows how the syrup making process is done, illustrated with photographs. Let people register on the web site to get a copy of the book. It would spread the knowledge very fast.

Put educational facts on the bottles, teach kids about this by field trips and agriculture classes, visits to Kids classrooms, etc.

Have a lower price and make it more available in various stores

Subsidize local farmers. Try to keep prices low

Lower the price

Crop subsidies

Put "REAL MAPLE SYRUP" on the labels of their bottles. And maybe something about how it was made and the different flavors that it comes in. That makes every batch a little different in taste.

Give them governmental support.



Sober Locavore SINKs in their own words

What else would you say or recommend to Sugarmakers?

I hope sugar makers will continue

Go maple producers!

God bless you!

Keep on tapping!!

Unique shaped bottles that can be collectible would be both eye catching on the shelves and encourage people to buy multiple packages.

Could it be mixed with real local fruit, like blackberries?

Thank you for making me aware that there are different flavor grades and regions that would change the flavor!

I love pure maple syrup but it's like liquid gold

I prefer maple syrup and would purchase it more often if the price was a more comparable amount to corn syrup. But I understand why it is so much higher.

I think that maple syrup is one the most best flavors there is. I would use more of it if it was cheaper.

Also, it would be good to give children the project of collecting sap and boiling it down at home using their own maple trees as I did as a child. This makes a permanent memory of the process and goodness of real maple syrup.

Ohio has maple sugar events annually and I really enjoy going and getting fresh products.

While it is more expensive they should market the fact it's natural and not made from GMO corn. It's even been said to have health benefits. This survey will make me buy more maple syrup over the cheaper ones for sure.

Sober Locavore SINKs – Opportunities

OPPORTUNITIES TO GROW PURE MAPLE TRIAL AND OCCASION:

This audience likes Pure Maple but sees it primarily as a breakfast condiment. Harness their interest in baking and introduce Pure Maple as a baking ingredient.

This audience consumes a lot of TV. Consider launching a reality show centered around the Pure Maple Syrup production industry and the families at its core.

Overall, any consumer who buys local/organic eggs is much more likely to purchase Pure Maple products. Work with farmers' market egg vendors to ensure Pure Maple products are available everywhere local eggs are sold.



Sober Locavore SINKs – Comms Plan

	Barrier	Comms Taks	Channel
Living	They are comfortable being unconventional, but don't express it through maple	Establish maple as a life-attitude statement rather than just consumption	Magazines Newspaper OOH
Looking	Maple is mostly a breakfast condiment	Help them learn how flavor grades and regions change the flavor of different type of foods	YouTube Newspaper Pinterest Radio
Buying	Enjoys baking but hasn't considered Maple as an ingredient	Spark creativity through new maple baking recipes	YouTube Daytime TV Pinterest
Sharing	Strong connection with local agriculture but not supporting maple producers	Build an association between farmers markets and Maple	Instagram Facebook



Wine Snobs

Wine Snobs – Audience Summary

10% of U.S. | 57% Male | 57% under age 45 | Higher-Income

Wine Snobs:	% Does not keep Table Syrup	% Keeps Table Syrup
% Does not keep Maple Syrup	21%	22%
% Keeps Maple Syrup	38%	19%



Wine Snobs – Audience Summary



How Price-Sensitive are they?

This audience is among the least price-sensitive.

Product Attributes and Occasions?

While this group clearly prefers Pure Maple Syrup to Table Syrup, their use of the product is not prolific: they're most likely to use Pure Maple as a breakfast condiment.

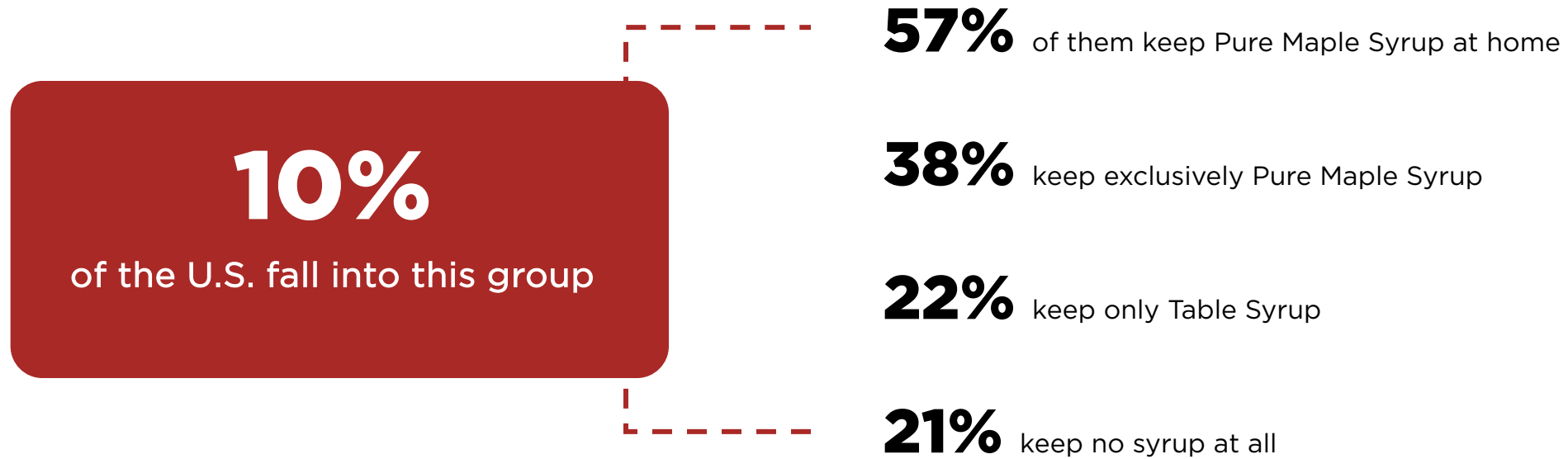
Where do they buy?

Farm stands and grocery stores, but not online.

How do we advertise to them?

Mobile advertising, the Internet, and out-of-home channels have the best reach to this audience, with special attention to YouTube, Instagram, and LinkedIn.

Wine Snobs – Detailed Profile



Wine Snobs – Detailed Profile

WHAT MAKES THEM UNIQUE:

Wine snobs are more likely to be upper-income (67% over \$75k) married (56%) men (57%) between 25-55 (71%) with no or fewer kids (52% 0; 36% 1-2). They mostly identify as White. Of all our audiences, this one is most likely to have at least a Bachelor's degree and to work full-time. They're also more likely than most other audiences to say their parents were born outside the U.S. and they're much more likely to travel abroad. Their families are very important to them.

They would consider themselves wine, beer, and whiskey connoisseurs, do not shy from the more expensive brands, collect all and are familiar not just with these products themselves but the production methods and how different varieties achieve their distinctive flavors. They will reach for low-carbohydrate, low-sugar, and low-calorie beer, wine, and cocktails. But not non-alcoholic options.

While they demonstrate a preference for Pure Maple Syrup as a prestige product in contrast to Table Syrup, they're not avid Breakfast Syrup consumers overall, nor are they nearly as discerning in their taste for Pure Maple as they are for wine, beer, and whiskey. They don't know about the sugaring process.

While they enjoy cooking, they do not bake. They love foreign foods and tend to prefer flavor instead of healthiness. They have no guilt over-eating sweets or fatty foods. They'd say they are slightly healthy eaters and are mostly in control of their weight. And they get a moderate amount of exercise. They prefer natural alternative sweeteners to artificial sweeteners.

They are among the least price-sensitive of the groups profiled. Some shop at farmers' markets. They mostly like the trend in healthy fast food. They are somewhat more likely to eat local – more so fruits and vegetables and meats but less dairy or eggs. They consider Pure Maple Syrup a treat but not too expensive nor unhealthy.

They're somewhat likely to say they are comfortable being unconventional. They say understanding nature is important to them. They recycle. They vote in presidential elections but not so much state or local elections.



Wine Snobs – Advertising Openness

How to Reach Them with Advertising by Channel:

- Cell Phone (32% reach; 1.1x average)
- Out of Home (28% reach; 1.0x average)
- Internet (21% reach; 1.1x average): on social networks, radio streams, and videos are most productive
- Radio (20% reach; 0.9x average)
- Primetime TV (17% reach; 0.8x average)
- Newspaper (15% reach; 0.8x average)
- Magazine (14% reach; 0.8x average) – most trusted
- Daytime TV (6% reach; 0.6x average)

Most-Frequented Content Sites:

- YouTube
- Instagram
- LinkedIn
- Wikipedia
- Pinterest
- Twitter
- Netflix
- TikTok
- ESPN
- Reddit

Wine Snobs in their own words

How can Pure Maple Sugarmakers get more people like you to buy their products?

I think it's too expensive for most people especially if it is used often

Need to have national chain restaurants use sugar makers and support this segment. They will need to market better and promote the products.

Provide taste workshops or let people sample their products. Costco provides product tasting at all their stores. That could be a way to let people know about their syrups.

Promote these items and recipes more strongly in restaurants or food festivals.

Taste samples. The difference is clear. Make access to the real thing more affordable.

I think the most important thing is to emphasize the simplicity of the process and the natural attributes. Making sure people know that local Americans benefit from people buying their products also helps.

More advertising, I never see or hear ads for pure maple syrup, at least not here in Texas!

Educate consumers more about the product and make it more widely available.

Pure maple syrup is by far the superior product, and free of all the artificial ingredients in corn syrup based products. Promote the pureness of maple syrup, in addition to any environmentally friendly practices routinely used in the industry. Finally, the flavor of pure maple syrup is far better than imitation maple syrup... some folks just don't know it because price is prohibitive for a lot of families.

Smaller more affordable samples. Under 5 dollars or less

They need more commercials and a better social media presence

Wine Snobs in their own words

What else would you say or recommend to Sugarmakers?

Don't give up. I love buying maple sugar and maple syrups. I use them in so many of my recipes.

If it is possible to lower the cost of maple syrup. Consumers may be more likely to purchase.

Possibly using a vehicle like coupons.com or grocers have the ability to coupon based on specific items the consumer has purchased

Wine Snobs – Opportunities

OPPORTUNITIES TO GROW PURE MAPLE TRIAL AND OCCASION:

This audience knows a lot about how wine, whiskey, and beer-making sourcing and production processes affect flavor and occasion. Leverage this familiarity to develop a connoisseur's palate for Pure Maple.

This audience loves overseas travel and foreign cuisine. Pique their interest in Pure Maple by working with celebrity chefs fusing Pure Maple Syrup and Maple Sugar flavors with different global culinary traditions. Explore a partnership with the Research Chefs Association or National Restaurant Association geared toward highlighting Pure Maple Syrup on menus.

This is the audience most likely to play Golf. Develop off-season sugaring partnerships with iconic golf courses in sugaring regions and promote “estate-grown” syrup bottles as souvenirs from playing these iconic courses.

This audience is likely to watch NCAA bowl games and March Madness on TV; as the Power Five conferences have lost their geographic contiguity over time, consider pushing the idea of the “Maple Belt” to describe the geographic region from which Maple Syrup (and many college athletic powerhouses) are made.



Wine Snobs – Comms Plan

	Barrier	Comms Taks	Channel
Living	They travel abroad but haven't seen Pure Maple experiences	Elevate the perception of Pure Maple through travel touchpoints	OOH Premium Hotels Netflix traveling series
Looking	Enjoy high-end restaurants but doesn't experience Pure Maple there	Partner with premium restaurants and curate a list of those using maple as an ingredient	OOH Fancy Restaurants
Buying	They consider themselves wine, beer and whiskey connoisseurs but not Pure Maple connoisseurs	Tell a story about the craft of Maple(Maple Belt) just as whiskey do and share cocktail recipes	YouTube Radio Wikipedia
Sharing	They play golf but doesn't associate it with Pure Maple	Create unique golf experiences in iconic courses	Instagram LinkedIn ESPN



Pure Maple Purists



Pure Maple Purists – Audience Summary

8% of U.S. | 63% Female | 65% over age 45 | Broad Income Range

Pure Maple Purists:	% Does not keep Table Syrup	% Keeps Table Syrup
% Does not keep Maple Syrup	7%	5%
% Keeps Maple Syrup	69%	19%



Pure Maple Purists – Audience Summary



How Price-Sensitive are they?

This audience is less price sensitive about food and are willing to pay more to support environmentally-friendly.

Product Attributes and Occasions?

Pure Maple Purists love cooking and baking and commonly substitute Pure Maple in their recipes.

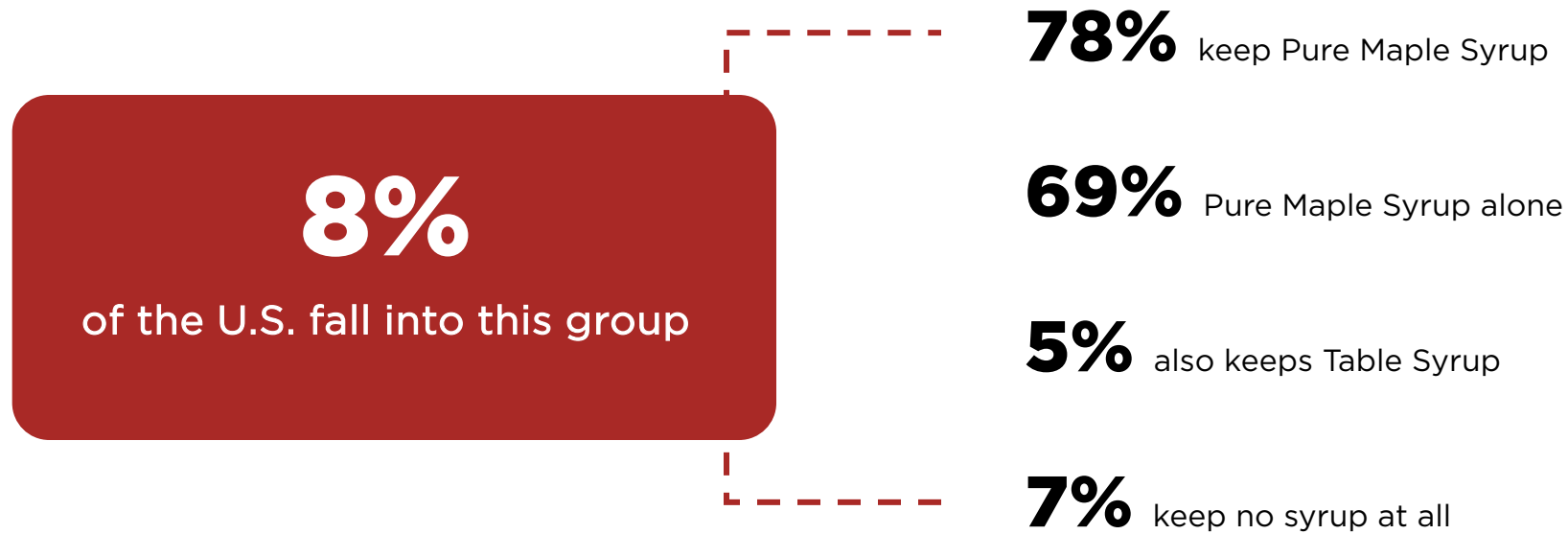
Where do they buy?

In-person at grocery stores, farmer stands, and online.

How do we advertise to them?

Mobile advertising, out-of-home, print, and internet.

Pure Maple Purists – Detailed Profile



Pure Maple Purists – Detailed Profile

WHAT MAKES THEM UNIQUE:

Pure Maple Purists are majority-female (63%), older (65% over age 45), more likely to be married (53%) or widowed (7%). They're more likely to have 0-2 kids (64% 0 / 27% 1-2), and average income. This group is majority-White but slightly more likely than average to identify as Black. When they travel, they prefer to travel abroad vs domestic.

These are the people who will tell you everything there is to know about Pure Maple Syrup, why it's a completely different – and superior – product from Table Syrup. They know how it's made. They check the label carefully and make sure they know what they're getting. They will buy Pure Maple Syrup everywhere: online, at farm stands, and at groceries. They are more likely to have several types of Pure Maple syrups on hand for different occasions and they can taste the differences between them. But they don't like flavored syrups nor the low-calorie formulations. They don't consider Pure Maple Syrup a treat – they consider it a staple. They have given Pure Maple Syrup as a gift and purchased it as a souvenir.

They are a little more price-sensitive than the other core Pure Maple audiences about food. Though they tend to buy American food products in general, they are less concerned than some of the other groups about whether their Maple is U.S.-sourced. They do think environmental soundness is good for businesses, they prefer to patronize environmentally-friendly companies, they will pay more for environmentally-friendly products, and they recycle. They strongly consider themselves optimists and they always vote.

They shop at farmer's markets, and buy local fruits and veggies, eggs, and dairy to support local farmers. They don't care about organic labels. They are less particular about their diets, and don't fuss about the supposed ills of sugar. They feel no guilt from eating sweets or fatty foods. They don't mind fast food. They're less likely to say they are in control of their weight, and they don't exercise. When they are sick, they don't work.

They enjoy baking and when they do, they are much more likely to try substituting Pure Maple products for sugar. They also like to cook meals from scratch and love trying new recipes. They enjoy foreign foods and tend to think flavor is more important than healthiness in what they eat.

Among all three of the core Pure Maple audiences, this group is the one most likely to consider breakfast the most important meal of the day. However, this group uses Pure Maple liberally for many different meals and occasions.



Pure Maple Purists – Advertising Openness

How to Reach Them with Advertising by Channel:

- Cell Phone (49% reach; 1.7x average)
- Out of Home (39% reach; 1.5x average)
- Magazine (26% reach; 1.5x average) – Most trusted
- Newspaper (24% reach; 1.4x average)
- Internet (17% reach; 0.9x average): Social Networks, Streaming radio, Search engines, Online Videos
- Primetime TV (16% reach; 0.8x average)
- Radio (15% reach; 0.7x average)
- Daytime TV (4% reach; 0.4x average)

Most-Frequented Content Sites:

- Facebook
- YouTube
- NCAA.com
- FOXNews.com
- Instagram
- Pinterest
- LinkedIn
- ESPN
- TikTok
- Wikipedia
- CNN
- Twitter
- NextDoor



Pure Maple Purists in their own words

How can Pure Maple Sugarmakers get more people like you to buy their products?

A couple of things. More advertising about the NE maple syrup making process- but also, more importantly, the issues with high fructose corn syrup in table syrup and its impacts on health and weight.

A government subsidy that would lower the cost of production and allow suppliers to pass on the lower cost to consumers

Greater advertising and distribution. A good slogan would help too corn based syrups are artificial and maple syrup is pure. The general public needs to be educated on the differences.

I didn't know it was dying but if you highlight the local aspect and that it doesn't have corn syrup and other terrible ingredients people will see the value. Plus you're supporting a local small business and not the big ag companies

More stores to carry these products to make it available and convenient for consumers.

They might want to start using social media as an ad-campaign to educate people more about the difference. Growing up, I didn't know that Mrs. Buttersworth etc. was not actually maple syrup, it was a marketing trick that had sucked people in due to the price and added sugar/taste. So, debunking a myth like that takes some time but it definitely is possible if they try. I totally prefer Maple Syrup, especially from the local sugarmakers.

a marketing campaign similar to what the egg industry used decades ago. then get lobbyists into action to find similar subsidies to what other growers get to bring down the prices on the excellent products.

Pure Maple Purists in their own words

What else would you say or recommend to Sugarmakers?

You should spotlight individual employees and families who work there. Especially if the business has been in the family for generations. People want to support American businesses and not Kellogg's

No, but I really LOVE maple sugar candies, so maybe make more of that

I always have maple syrup at home. There's a lady not too far up the road that makes it.

Let people know it's healthier and tastier.

Make syrup and things that are made from Maple more affordable and more available throughout the country

The industry should run awareness campaigns. They need some government subsidies.

Pure maple syrup is the best but can be expensive. Variety packs of the 4 different grades, like a sampler would give more the opportunity to try it and hopefully have a favorite to buy full size.

See previous response. I wish I could buy syrup more locally, but it isn't farmed in Colorado.

No, just keep on producing that good stuff! It will make it much cheaper for the consumer if most people switch over, supply and demand!

Pure Maple Purists – Opportunities

OPPORTUNITIES TO GROW PURE MAPLE TRIAL AND OCCASION:

Pure Maple Purists can best be enlisted to create the demand for Pure Maple Products in grocery stores around the country. This is a group of people who believe in and will advocate for the Pure Maple product if engaged appropriately. Tap this group to activate around retailer petitions, local sugarmaking demonstrations, and federal/state/local legislative proceedings. Get them to get Pure Maple Syrup on the WIC-approved products list, mobilize for producer subsidies.

Pure Maple Purists are the group most likely to collect and promote the collection of different Pure Maple collectibles should distinctive packaging become an element of Pure Maple's marketing approach.

This audience is likely to watch NCAA bowl games and March Madness on TV; as the Power Five conferences have lost their geographic contiguity over time, consider pushing the idea of the "Maple Belt" to describe the geographic region from which Maple Syrup (and many college athletic powerhouses) are made.

Overall, any consumer who buys local/organic eggs is much more likely to purchase Pure Maple products. Work with farmers' market egg vendors to ensure Pure Maple products are available everywhere local eggs are sold.



Pure Maple Purists – Comms Plan

	Barrier	Comms Taks	Channel
Living	They enjoy traveling but haven't seen a pure maple experience in those moments	Create a collection of experiences of different Pure Maple Syrups across the Maple Belt	OOH Hotels
Looking	Love and know Pure Maple Syrup but sometimes are price sensitive	Highlight the value of investing in quality flavor	Magazines OOH
Buying	Enjoy visiting farmers markets and buying local but need to reinforce the frequency of Pure Maple producers	Tell the story of each of the Pure Maple producer sites	Radio Streaming Radio Fox News
Sharing	True believers of Pure Maple Syrup but could be more vocal about it	Establish a platform where they can share all what they know about Pure Maple production and benefits	Facebook Instagram TikTok



Maple and Table Audiences



Syrup Explorers



Syrup Explorers – Audience Summary

16% of U.S. | 66% Male | 79% under age 45 | Higher-Income | More Diverse

Syrup Explorers:	% Does not keep Table Syrup	% Keeps Table Syrup
% Does not keep Maple Syrup	9%	11%
% Keeps Maple Syrup	11%	68%



Syrup Explorers – Audience Summary



How Price-Sensitive are they?

This audience is not very price-sensitive and will pay more for environmentally conscious products.

Product Attributes and Occasions?

This group is very receptive to Pure Maple syrup, but does also purchases table syrup, especially the low-calorie variety. They consider breakfast one of the most important meals of they day but use Maple Syrup in diverse occasions: as a substitute in baking and in cocktails. While their volume of syrup consumption may be low, they are likely to keep many varieties of syrup on-hand for different occasions.

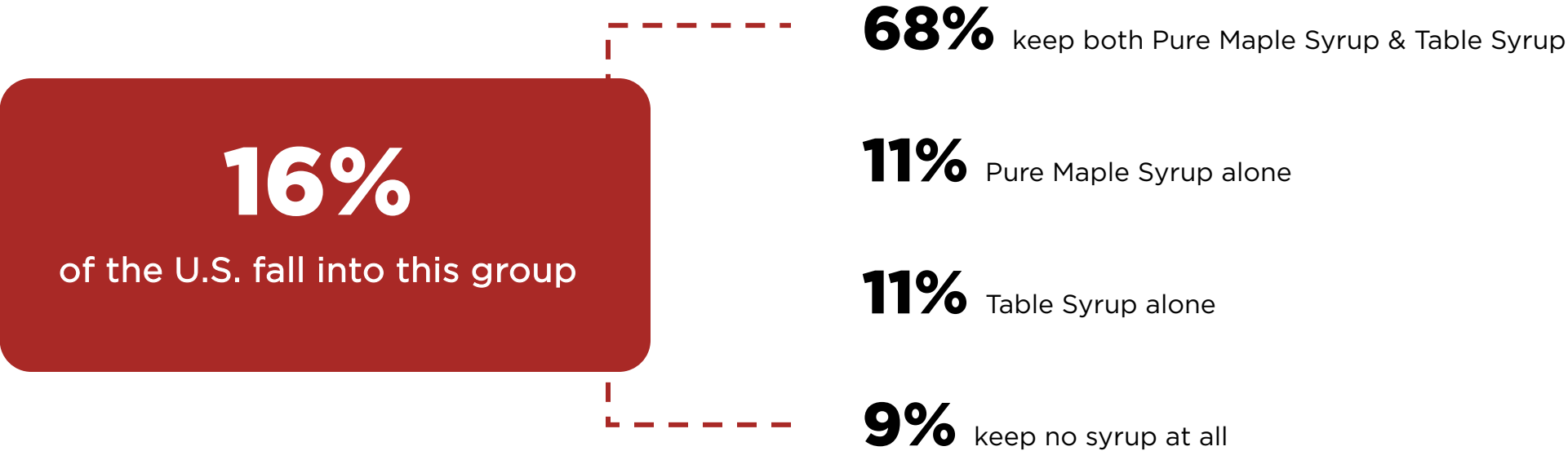
Where do they buy?

In-person at farm stands, farmer's markets, grocery stores, and online

How do we advertise to them?

Cell phones, out-of-home, and the internet with specific nods to Facebook, YouTube, Instagram, and LinkedIn. Also consumes Spanish-language media.

Syrup Explorers – Detailed Profile



Syrup Explorers – Detailed Profile

WHAT MAKES THEM UNIQUE:

Syrup Explorers tend to be younger (79% under 45) men (66%) with kids (56%), either single (42%) or married (48%) and have slightly higher than average income as well as educational attainment. Other than Simple Starters, this is the most ethnically-diverse audience in our study: 17% identify as Black, 10% as Asian, 11% as Hispanic. They're slightly less likely than others to speak English at home and most likely of all groups to speak some Spanish (48%). This group is far more likely to work full-time and say they regularly sacrifice their family life for their career. Many of them vote consistently in every election, though it's a mixed bag. They are much more likely to say they'd participate in protests about issues that matter to them. They do travel abroad but prefer to travel domestic.

This group is something of a paradox: they are open to exploring a variety of breakfast syrups (Pure Maple and Table) for a variety of different occasions, but may also be limiting their sugar intake, considering it both an unhealthy and an unethical industry. This group strongly prefers low-calorie breakfast syrups if they can find it. They would say they are informed about their diet and in control of their weight, even if they don't always eat healthy. They do tend to get regular exercise. They feel guilty about eating sweets. They'd say they're somewhat comfortable being unconventional and are generally quite optimistic about life.

They strongly consider Breakfast to be the most important meal of the day. They enjoy cooking gourmet and diverse meals but often pick up something pre-cooked. They bake and do substitute Pure Maple in a recipe. They are the only group who enthusiastically collects breakfast syrups as well as beer, whiskey, and wine (and knows about the production process of each). And they mix maple syrup into their cocktails. They also are likely to select low-carb/low-sugar/low-calorie as well as non-alcoholic beer, wine, and cocktails. They are the person who always chooses the wine at a restaurant.

They aren't very price-sensitive and will shop in-person and online. They're more likely to visit farmers' markets, belong to community-supported agricultural co-ops, and eat local and organic foods. But they're most likely to say the reason is to keep their carbon footprint low. They tend to patronize environmentally-friendly companies and will pay more for environmentally-friendly products.



Syrup Explorers – Advertising Openness

How to Reach Them with Advertising by Channel:

- Cell Phone (62% reach; 2.1x average)
- Out of Home (42% reach; 1.6x average)
- Internet (24% reach; 1.3x average): streaming radio, social networks, video
- Newspaper (15% reach; 0.9x average)
- Magazine (15% reach; 0.8x average) – most trusted
- Radio (12% reach 0.6x average)
- Primetime TV (8% reach; 0.4x average)

Most-Frequented Content Sites:

- Facebook
- YouTube
- Instagram
- LinkedIn
- Wikipedia
- ESPN
- Pinterest
- Twitter
- Reddit
- TikTok
- Netflix
- Spotify
- Discord
- Twitch

Syrup Explorers in their own words

How can Pure Maple Sugarmakers get more people like you to buy their products?

I think their best bet is to try to utilize social media and TikTok on particular to advertise. Making interesting content and participating in trends helps a lot of companies in boosting public awareness of their company and in turn sales.

I think they could do a better job of educating Americans about these differences in their marketing to entice people into buying maple-flavored products.

Invest in research and development to improve syrup production methods

I think removing the stigma on sugary foods but there is so much sugar in everything now that it is hard to do

List out the healthy benefits between the two on their labels so that customers can view it clearly and decide to be honest

I think that they should keep it fresh and no chemicals or additives. Everything should be fresh and good.

They can improve by dishing out more advertisement and open awareness of maple syrup

We need more Healthy food for the kids in school and at home

use the maple syrup more as ingredients in things

Syrup Explorers in their own words

What else would you say or recommend to Sugarmakers?

Love pure maple syrup

Maple syrup is good

I hope the industry remains active

protect the environment

I like maple syrup.

Just keep the good work up and people like me will keep buying it.

I would buy maple syrup if it was more available here

Education

Syrup Explorers – Opportunities

OPPORTUNITIES TO GROW PURE MAPLE TRIAL AND OCCASION:

This audience appreciates premium products and often eats at restaurants. They travel often and put their professional lives ahead of their families. Appeal to their sense of prestige by partnering with a high-end hotel chain that rewards frequent business travelers with free breakfasts: develop curated “maple menus” to up-level the hotel breakfast experience with small-batch select varieties of Pure Maple of different grades, from different regions, different evaporation and filtration techniques, delivered in refillable 50mL glass urns. An example could be Hilton, who could work with a local sugarmaker to produce syrup at their “Tapestry Collection” Tailwater Lodge in Altmar, NY and then sell as a premium product in their NYC flagship properties.

This audience is very likely (48%) to speak some Spanish. Ensure Pure Maple products have a visible presence in Spanish-language media and retailers, book Spanish-language media tours of Maple Sugaring facilities, and work with chefs from Latin American culinary traditions to bring Maple flavors to diversify those dishes. Spotlight the cultural legacy of Maple Sugaring as an indigenous practice that existed for centuries before European arrival to North America.

Of all audiences studied, this audience is second-most likely to play video games. Popular games Stardew Valley, Mon Bazou, Coral Island, HarvestCraft all feature Maple Sugaring simulation. Consider engaging the “virtual sugarmaking” community around these games in both online and offline events. Are IRL sugarmakers sugaring in Stardew Valley in the off-season?

This audience is likely to watch NCAA bowl games and March Madness on TV; as the Power Five conferences have lost their geographic contiguity over time, consider pushing the idea of the “Maple Belt” to describe the geographic region from which Maple Syrup (and many college athletic powerhouses) are made.



Syrup Explorers – Comms Plan

	Barrier	Comms Taks	Channel
Living	They emphasize a healthy lifestyle, but are apprehensive about sugar consumption	Consider educating this audience on the energy benefits of consuming maple with the right portions	Instagram YouTube Pinterest Reddit
Looking	Breakfast is important but often opt for options that are on-the-go and do not include Pure Maple	Design on-the-go Pure Maple packets for the busy consumer	OOH Spotify-Podcast
Buying	Likely to shop at farm stands and CSA's for environmental reasons but they could be more environmentally friendly	Partner with local farm stands to create a refillable Pure Maple program to reuse bottles	Instagram Newspaper Facebook
Sharing	The audience is knowledgeable on the sugar making process, but not purchasing as much Pure Maple	Encourage them to be part of online conversations about the benefits of Pure Maple	Instagram Facebook Twitter



Conventional Sweets



Conventional Sweets – Audience Summary

14% of U.S. | 54% Male | 72% over age 45 | Typical Income Distribution

Conventional Sweets:	% Does not keep Table Syrup	% Keeps Table Syrup
% Does not keep Maple Syrup	23%	27%
% Keeps Maple Syrup	24%	27%



Conventional Sweets – Audience Summary



How Price-Sensitive are they?

This audience is very price-sensitive and tends to reject moves towards healthy food trends, especially if there is an increase in cost. They often equate “organic” to mean “more expensive” and avoid anything with that label.

Product Attributes and Occasions?

This audience is all about sweetness, with health being a bottom priority in selecting foods. Their use of syrup is as a breakfast condiment, and they are very likely to eat pre-cooked/pre-packaged meals. They value flavor over healthiness and are more inclined to eat fast food or pre-cooked meals. They have no guilt about any of their eating habits, not even their fat or sugar consumption.

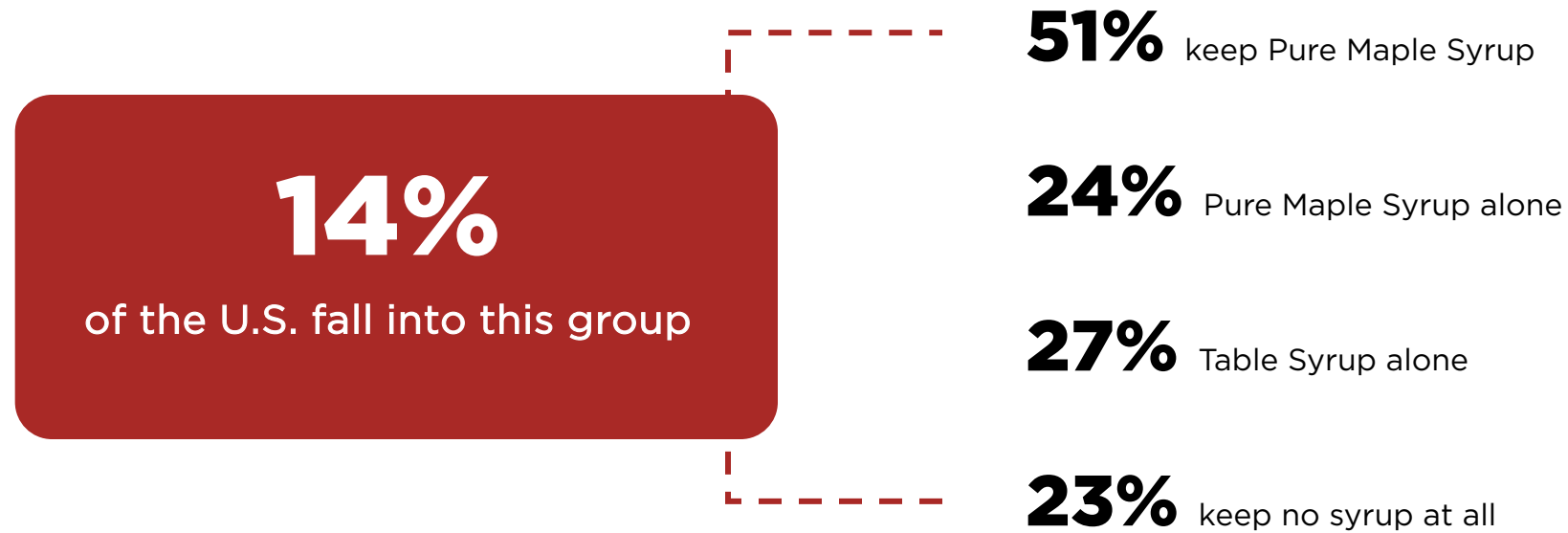
Where do they buy?

In-person at grocery stores.

How do we advertise to them?

Radio, out-of-home, cell phone, internet, and TV, where print is least likely to reach them.

Conventional Sweets – Detailed Profile



Conventional Sweets – Detailed Profile

WHAT MAKES THEM UNIQUE:

The Conventional Sweets audience are all about the sugar. And they perceive the “organic” label to mean “expensive.” Slightly more male (54%) than female (46%), this middle-aged audience (56% between 45-65) are most likely to have fewer or no kids (88% have none or just one), and much less likely to be single. Average-income, mostly-White, either employed (41%) or disabled (19%). They’re not likely to have completed post-secondary education. They generally travel within the U.S. but would be open to going abroad. For this audience, family is the most important thing in life, and most of them would say they’re optimistic.

They would be the first ones to tell you while they don’t know what healthy eating is, they’re pretty sure it isn’t what they do. They value flavor above healthiness in their food choices, they eat pre-cooked and fast food frequently. And they have absolutely no apologies about any of it – not about the sweets nor about the fatty foods.

This audience may be comfortable being unconventional as individuals, but they absolutely prefer their food to come from conventional agricultural sources: They are a “hard no” on any move towards healthier living through eating or agriculture and don’t like the trends they see in stores and restaurants towards healthier options. Especially if those moves mean higher costs – this group is more price-sensitive than most.

They are also open to trying new recipes from time to time.



Conventional Sweets – Advertising Openness

How to Reach Them with Advertising by Channel:

- Radio (32% reach; 1.5x average)
- Out of Home (30% reach; 1.2x average)
- Cell Phone (24% reach; 0.8x average)
- Internet (17% reach; 0.9x average): very susceptible to internet advertising – online videos, social media, search engine, mobile apps, video games, and streaming radio
- Primetime TV (16% reach; 0.8x average)
- Newspaper (8% reach; 0.5x average)
- Magazine (6% reach; 0.4x average)
- Daytime TV (2% reach; 0.2x average)

Most-Frequented Content Sites:

- Facebook
- YouTube
- Wikipedia
- Pinterest
- Twitter
- TikTok
- Reddit
- Netflix
- ESPN
- Weather Channel
- Discord
- Spotify



Conventional Sweets in their own words

How can Pure Maple Sugarmakers get more people like you to buy their products?

Innovative new designs and products.

To advertise that kind of information more to promote their products. Also, maybe try to have more of a variety of products, flavors, etc.

I would buy pure maple syrup all the time if I could afford it. So finding a way to lower the cost is imperative.

Doing more to educate the public about the difference between the two and why pure maple syrup is better

Plant more trees in regulated environments like green house warehouses

Stop cutting down trees

Subsidies to bring the price of pure maple syrup down.

stronger marketing to increase awareness

Just keep the same energy you had while riding this drying season

Government subsidies like they do for several other agricultural industries.

tell people about it and where it was made and let people sample different kinds

Think I write a label on their bottle explaining the process and how they're different

Conventional Sweets in their own words

What else would you say or recommend to Sugarmakers?

Most of these folks are small producers and make an excellent product!

I didn't know any of this before this survey. You need to get your message (differences) out to the public.

Didn't know it was a struggling industry. I will buy more

The "American" population continues to be diluted by people from other cultures.

I had no idea of the struggle of maple sugarmakers over the U.S.

I would like to try pure syrup but I never see anyone seeking it

Need to expose the public to the pure maple syrup

I would encourage the makers to continue their efforts.

I did not think maple syrup was such a laborious chore

Have yearly sales to move inventory

Just that I love pure maple Syrup

keep price affordable

Conventional Sweets – Opportunities

OPPORTUNITIES TO GROW PURE MAPLE TRIAL AND OCCASION:

Some of the audience might be open to “Maple tourism” -- those on disability and thus restricted from wage-working might be able to travel to sugar-making locales by car in the winter and provide free labor in exchange for a week or two of quarters, camaraderie, and a share of the finished product they can take home and use for the year. This might not directly boost retail sales, but it could meaningfully lower production costs.

Members of this audience also play video games, though less so than the Syrup Explorers. A “virtual sugarmakers” engagement program targeted to gamers of games like Stardew Valley where sugarmaking is an aspect, may reach this audience as well.

This audience is likely to watch NCAA bowl games and March Madness on TV; as the Power Five conferences have lost their geographic contiguity over time, consider pushing the idea of the “Maple Belt” to describe the geographic region from which Maple Syrup (and many college athletic powerhouses) are made.



Conventional Sweets – Comms Plan

	Barrier	Comms Taks	Channel
Living	They are not health conscious, but value flavor over nutrition	Introduce new recipes where Pure Maple isn't a healthy substitution, but offers new flavor profile	Pinterest TikTok Facebook
Looking	Travel but do not always associate it with Pure Maple	Introduce them the idea of Maple Traveling to experience taste in different regions	Radio Facebook Internet OOH
Buying	Price sensitive shoppers who will reject any health trends	Develop a pure maple syrup refill station to help reduce packaging costs and build loyalty.	OOH Newspaper
Sharing	Big fans of sports, but not sharing their fandom side through maple	Consider establishing the idea of The Maple Belt to associate with college athletic power hoses	ESPN Discord Reddit



Organic Healthy Habits



Organic Healthy Habits – Audience Summary

9% of U.S. | 57% Female | Slightly Younger Skew | Higher-Income

Organic Healthy Habits:	% Does not keep Table Syrup	% Keeps Table Syrup
% Does not keep Maple Syrup	19%	14%
% Keeps Maple Syrup	30%	37%



Organic Healthy Habits – Audience Summary



How Price-Sensitive are they?

This audience is not price-sensitive at all. They are willing to pay more for food that is organic and “healthy.” They have a large “buy American” and “buy local” ethos.

Product Attributes and Occasions?

This audience keeps health at the top of mind, regulating what they consume to only healthy products. They consider breakfast the most important meal of the day and are highly likely to choose Pure Maple. While they are open to natural sugar alternatives, they also tend to feel guilt when consuming sugar, thus sometimes opting for a low-calorie alternative.

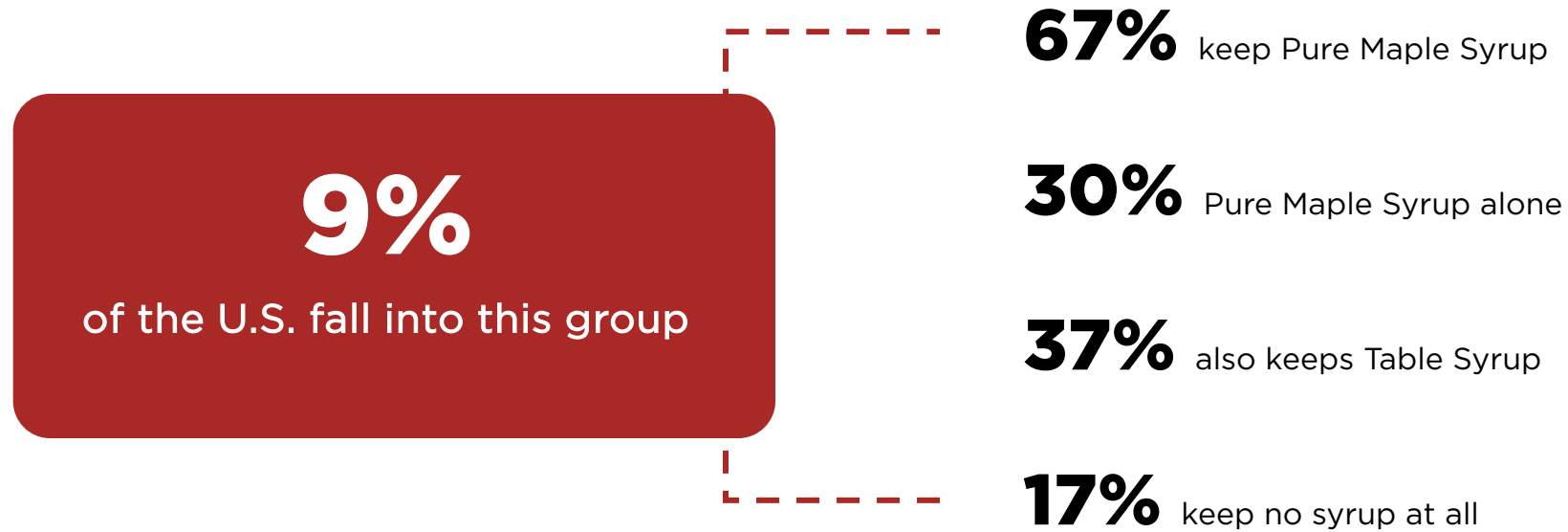
Where do they buy?

Farmer’s markets.

How do we advertise to them?

Cell phone, internet, newspaper, and magazine, with increased interest in online platforms such as Facebook, LinkedIn, and YouTube. TV advertisements are least likely to reach this audience.

Organic Healthy Habits - Detailed Profile



Organic Healthy Habits - Detailed Profile

WHAT MAKES THEM UNIQUE:

This audience is mostly-female (57%), young-to-middle-aged (just 7% 65+), more likely than average to be married (56%) and have 1-2 children (43%). They have higher-than-average income and are much more likely than average to be working full-or-part-time. They're slightly more diverse than average and are the most likely audience to have attained a bachelor's or higher degree (51% Bachelor's, Master's, or Doctorate). They travel both domestic and abroad. Family is very important to this audience, as is an understanding of nature.

They consider breakfast the most important meal of the day. They are moderately likely to use breakfast syrup and when they do, they're very likely to select Pure Maple. This audience is not price-sensitive; however, they may be watching their sugar intake for health reasons, and they prefer to use organic, low-calorie alternatives. They exercise regularly and are in control of their weight. When they eat sweet foods, they experience guilt. They like the trend toward healthy options in fast food. They look for "more natural" alternatives to sugar. They only eat "healthy" snacks.

Their most consistent preference is around organically-sourced food. They read their labels carefully and always opt for the organic option. They are more likely to shop at farmers markets and belong to Community Supported Agricultural co-ops. They have a strong "buy American" preference when it comes to food, but their "buy local" ethos is even stronger. This is the only group that consistently says locally- and organically-sourced foods are healthier. They consider fast food "junk" and say environmental soundness is good for business. They patronize environmentally-friendly companies and are happy to pay more for their products. They absolutely recycle. And they vote consistently. However, they do not seem to connect Sugarmaking with any other sustainability or advocacy programs.

They are well-informed about their diet and its relationship to their health, and they are proud to eat healthy. They balance flavor and healthiness well: enjoying gourmet food and foreign dishes.



Organic Healthy Habits – Advertising Openness

How to Reach Them with Advertising by Channel:

- Cell Phone (55% reach, 1.9x average)
- Internet (36% reach, 1.9x average): social networks, search engines, streaming video, mobile apps
- Newspaper (20% reach, 1.1x average) – most trusted
- Magazine (19% reach, 1.1x average)
- Out of home (19% reach, 0.7x average)
- Primetime TV (7% reach, 0.3x average)
- Radio (3% reach, 0.2x average)
- Daytime TV (2% reach, 0.2x average)

Most-Frequented Content Sites:

- Facebook
- YouTube
- LinkedIn
- Wikipedia
- Twitter
- TikTok
- Pinterest
- Netflix
- ESPN
- NY Times
- Reddit
- CNN
- Discord
- Fandom

Organic Healthy Habits in their own words

How can Pure Maple Sugarmakers get more people like you to buy their products?

Advertise it and get the word out in these maple syrup areas. We know how good it is, just spread the word and have some sales at certain times

Better labeling on product and advertisement online would be helpful.

I think demonstration/tasting of the product in local supermarket and making it affordable to everyone.

If the government got involved to help pure sugar makers keep the history alive with subsidies. Corn syrup is not as healthy or tasty, and it lacks a story.

Price is always an issue. Maybe the solution would be to set up like tasting booths and even show the process of how it's made.

We have a program at our local park that shows you how maple syrup is made and it's a very nice program

An education campaign with commercials and billboards

Organic Healthy Habits in their own words

What else would you say or recommend to Sugarmakers?

Help spread the truth that maple syrup is a healthy alternative to sugar in food and beverages.

If I had a choice in buying maple syrup locally and if it were easier to find I would buy it more often. Syrup in my household lasts a long while before I have to go back to the store and buy some more.

When people are not exposed to a particular product, they do not have comparisons or the knowledge that one is healthier than the other. Education is key.



Organic Healthy Habits – Opportunities

OPPORTUNITIES TO GROW PURE MAPLE TRIAL AND OCCASION:

This is the audience most likely to engage around a pure-play “Pure Maple is a locally-sourced, all-natural, solar-powered sweetener that comes from trees” message. Reach this audience through grassroots contact: CSA programs and farmers’ markets. Instead of only selling individual pre-sealed containers, consider a “top-up” program where Pure Maple vendors sell syrup by refilling crocks or doing rinse-and-return bottle exchanges akin to higher-end local dairies. Ensure the packaging for exchangeable bottles use language emphasizing the relatively light carbon footprint of sugarmaking and the relationship between Pure Maple production and timber protection. This audience is likely the only audience who will participate in rinse-and-return bottle exchanges, so being more aggressively environmentalist on the packaging will reach this audience without risking alienating others.

Members of this audience also play video games, though less so than the Syrup Explorers. A “virtual sugarmakers” engagement program targeted to gamers of games like Stardew Valley where sugarmaking is an aspect, may reach this audience as well.

This audience is likely to watch NCAA bowl games and March Madness on TV; as the Power Five conferences have lost their geographic contiguity over time, consider pushing the idea of the “Maple Belt” to describe the geographic region from which Maple Syrup (and many college athletic powerhouses) are made.

Overall, any consumer who buys local/organic eggs is much more likely to purchase Pure Maple products. Work with farmers’ market egg vendors to ensure Pure Maple products are available everywhere local eggs are sold.



Organic Healthy Habits – Comms Plan

	Barrier	Comms Taks	Channel
Living	Live by healthy and organic habits, but feel guilt when consuming sugar	Help consumers understand the benefits of Pure Maple	Magazine
Looking	Consumers might be more inclined to purchase if they had an idea of what Pure Maple taste like	Set up in store or in-area taste testing to educate consumers	OOH Instagram
Buying	Frequently shop at farm stands and CSAs, but Pure Maple isn't top of mind	Create a refillable container program to refill and reuse maple bottles	OOH Newspaper Internet
Sharing	They recycle but Pure Maple haven't given them the opportunity to share with their social circle that they can do it	Join online communities to share how Pure Maple has a recyclable option	Facebook Twitter Reddit



Conventional Healthy Habits

Conventional Healthy Habits – Audience Summary

7% of U.S. | 57% Female | 70% over age 55 | Higher-Income

Conventional Healthy Habits:	% Does not keep Table Syrup	% Keeps Table Syrup
% Does not keep Maple Syrup	33%	21%
% Keeps Maple Syrup	26%	20%



Conventional Healthy Habits – Audience Summary



How Price-Sensitive are they?

This audience is not very price-sensitive, but will not pay more for environmentally friendly products, nor are they interested in purchasing “organic” labels.

Product Attributes and Occasions?

This audience leans into healthy eating habits and for the sake of calories, is more likely to choose a low-calorie breakfast syrup over a syrup with high sugar content. Uses more traditional alternative sweeteners like Sweet n’ Low instead of natural alternatives like Stevia.

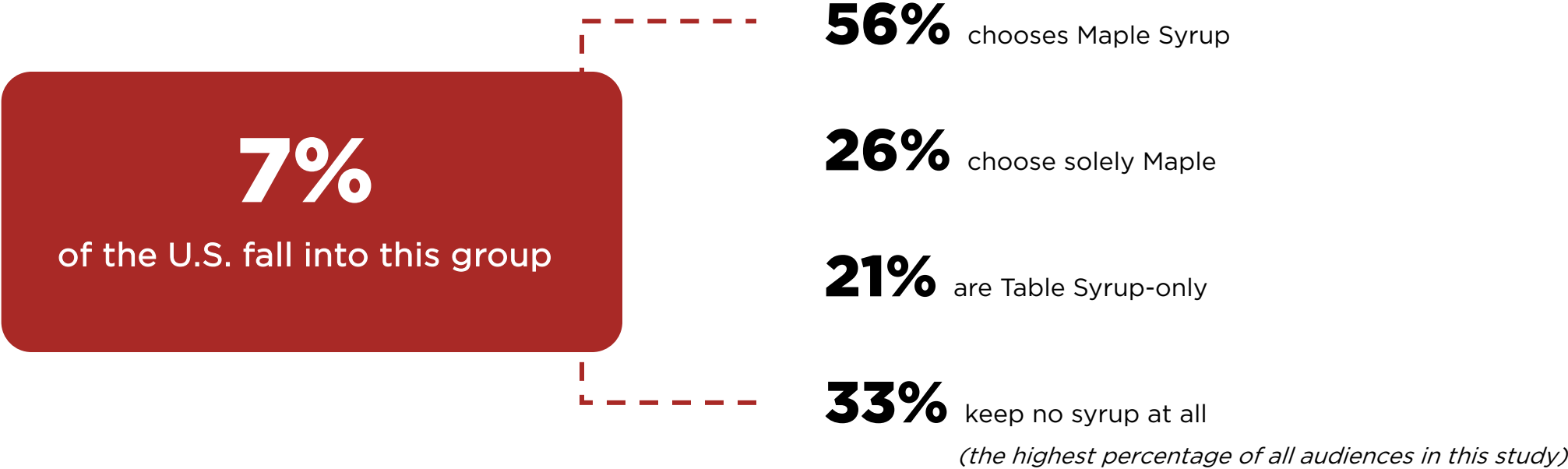
Where do they buy?

In-person at conventional grocery stores (e.g., not Whole Foods).

How do we advertise to them?

TV, magazines, and newspaper, where they are least receptive to radio and internet advertisement.

Conventional Healthy Habits – Detailed Profile



Conventional Healthy Habits – Detailed Profile

WHAT MAKES THEM UNIQUE:

This audience is similar in many ways to the Organic Healthy Habits audience but distinct from them as well, primarily in the lack of ethical grounding in their predilection for healthy habits and choices. The Conventional Healthy Habits audience is 57% female, older (70% 55+), and much likelier than average to have no children (86%). They are far likelier than average to be married or cohabitating (63%) and have a higher income (59% \$60k+). They are among the least-likely to be employed full-time (just 26%) and have higher levels of education than average (49% with at least a bachelor's). They consider family very important in life and are optimists. They enjoy both overseas and domestic travel.

This audience's food choices are very likely to be health-driven. They're not particularly price-sensitive. And unlike the Organic Healthy Habits, they're more utilitarian in their selections: less likely to select gourmet or foreign recipes, or to buy organic or local foods. They do avoid artificial ingredients. They don't shop at farmer's markets or buy food online. They're more likely to focus on healthiness and trade away flavor. They are very well-informed about nutrition. They don't mind cooking or baking but are more mixed in their disposition towards both.

They are more likely to say they avoid sugar and sweets for health reasons. They're more likely than other groups to select a low-calorie alternative Breakfast Syrup selection. Eating sweets and fatty foods makes them feel guilty. They exercise regularly and would say they are in control of their weight. If they drink alcohol, they're more likely to select low-calorie/low-sugar/low-carb options. They eat "healthy snacks."

They tend to say breakfast is the most important meal.

They don't patronize environmentally-friendly companies or pay more for environmentally-friendly products. They are mixed on recycling.



Conventional Healthy Habits – Advertising Openness

How to Reach Them with Advertising by Channel:

- Out of Home (34% reach, 1.3x average)
- Primetime TV (30% reach, 1.5x average)
- Cell Phone (30% reach, 1.1x average)
- Magazine (28% reach, 1.6x average) – most trusted
- Newspaper (27% reach, 1.5x average) – 3rd most trusted
- Radio (22% reach, 1.0x average)
- Daytime TV (16% reach, 1.7x average) – 2nd most trusted
- Internet (12% reach, 0.6x average): social networks, search engines, streaming radio, videos

Most-Frequented Content Sites:

- Facebook
- YouTube
- Instagram
- LinkedIn
- Wikipedia
- Twitter
- Pinterest
- TikTok
- ESPN
- CNN
- FOX News
- NCAA.com
- CNBC

Conventional Healthy Habits in their own words

How can Pure Maple Sugarmakers get more people like you to buy their products?

A national campaign that shows the benefits of natural maple syrup over corn syrup alternatives

More education and lower prices. I often don't try food products because they are just too expensive.

As a consumer, I was not aware of the difference between the two syrup types. I think sugarmakers should launch communication ads such as on television and ads to inform consumers on how pure syrup is made and to educate the public on the benefits on using these production techniques. By informing consumers, it helps to explain why consumers should support syrup sales to keep this staple product alive.

Let them have a taste. Whenever I am invited to a brunch I make a French Toast casserole with Maple syrup. I always leave the syrup as a gift. I frequently receive a thank you call or email about how wonderful the maple syrup tastes. So, answer is - share the syrup - the taste speaks for itself.

More adds in food magazines. I never see maple syrup ads in food magazines. Also, travel mags. Contact the travel mags and have them visit the sugarmakers. Put them on the tours. I didn't know this info, but they can be like winemakers and have tastings and tours.

I think advertising more would help. I've never seen a pure maple syrup ad. Also a new brand image might help. The whole rugged, outdoorsy feeling of maple syrup seems a little dated.

Conventional Healthy Habits in their own words

What else would you say or recommend to Sugarmakers?

I enjoyed this survey and I also learned something new about how pure syrup is produced. I think educating consumers is the most powerful method to keep this industry alive.

Conventional Healthy Habits – Opportunities

OPPORTUNITIES TO GROW PURE MAPLE TRIAL AND OCCASION:

While this audience is obsessed with healthy choices, they have a reactionary response against the idea of buying organic or locally-sourced foods and reject anything billed as sustainable or environmentally-friendly. But the audience also rejects artificial flavors and additives. Pure Maple can reach this audience by focusing on its story as a natural, single-ingredient product without discussing its “green” characteristics.

As this audience gets regular exercise, they may be open to Maple Water as a natural single-ingredient electrolyte-infused rehydration elixir, in contrast to more highly-processed sports beverages. However, product marketing must avoid “organic/sustainable” language to find buyers from this audience.

This audience is likely to watch NCAA bowl games and March Madness on TV; as the Power Five conferences have lost their geographic contiguity over time, consider pushing the idea of the “Maple Belt” to describe the geographic region from which Maple Syrup (and many college athletic powerhouses) are made.



Conventional Healthy Habits – Comms Plan

	Barrier	Comms Taks	Channel
Living	Healthy-driven choices but can sacrifice flavor.	Help consumers understand the benefits of Pure Maple	TV Magazine YouTube
Looking	Enjoys foreign and gourmet dishes, but doesn't always include Pure Maple Syrup	Create a recipe series showing how Pure Maple can be incorporated into foreign and gourmet dishes	Instagram YouTube Pinterest
Buying	Reject any labels that indicate organic or environmentally friendly	Market Pure Maple to these consumers, excluding organic or environmentally friendly keywords, honing in on its benefits	Magazine TV Facebook
Sharing	Increased interest around basketball but does not associate it with Pure Maple	Create a Maple Belt to describe geographic regions from where Pure Maple and many basketball powerhouses are from	TV Radio YouTube



Syrup Non-Purchasing Audiences



Simple Starters

Simple Starters – Audience Summary

7% of U.S. | 59% Female | 80% under age 45 | Lower-Income | More Diverse

Simple Starters:	% Does not keep Table Syrup	% Keeps Table Syrup
% Does not keep Maple Syrup	54%	12%
% Keeps Maple Syrup	17%	17%



Simple Starters – Audience Summary



How Price-Sensitive are they?

This audience is very price-sensitive, and they are not willing to spend more money on products that are environmentally sustainable.

Product Attributes and Occasions?

This audience doesn't have much occasion to use Pure Maple or breakfast syrups in general. Overall, this audience puts low emphasis on health, does not view fast food as junk, are less likely to be in control of their weight, and feel no guilt around consuming fat or sugar. While they are likely to prefer natural sugar alternatives, they have minimal interest in Breakfast syrup, let alone Pure Maple.

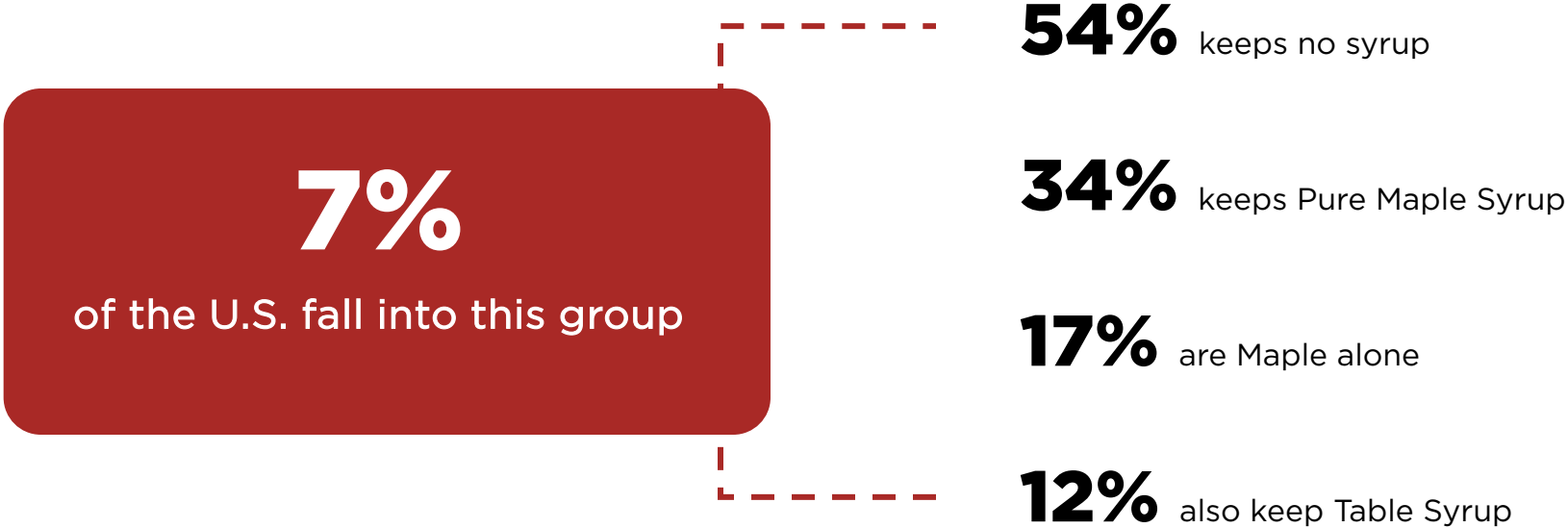
Where do they buy?

In-person at grocery stores.

How do we advertise to them?

Internet, radio, and cell phones, with an increased focus on websites like Facebook, YouTube, Instagram, and Netflix, as well as Spanish-Language media are good ways to reach them. Print and TV ads are least likely to reach this audience.

Simple Starters – Detailed Profile



Simple Starters – Detailed Profile

WHAT MAKES THEM UNIQUE:

The simple starts are distinctive because they do not drink much alcohol, reside in rural areas, and are much more likely to have households with no or few kids (0 – 51%, 1 – 20%, 2 – 14%). They are the most diverse audience of all studied (16% Black, 10% Asian, 16% Hispanic). They are second-most likely to speak some Spanish (19%). They are more likely to be female (59%), younger (58% 18-34), and single (46%). They work full-and-part-time a little more than average. Their income and levels of educational attainment are slightly below-average. This audience is not open to traveling abroad and believes families are very important. They are uncomfortable being unconventional, and do not consider themselves optimists. Of all groups this audience is least likely to consider it important “to respect customs and beliefs of others.”

This group does not often consider the nutritional value of their food selections. They’re less likely to buy organic foods, and healthy snacks, and does not think sugar is unhealthy. They also are less likely to eat gourmet or pre-cooked foods and do not view fast food as junk food. They are not well-informed about their diets, and do not feel guilt when indulging in foods high in fat or sugar. They’re also less likely to say they are “in control of their weight.” This group does prefer natural sugar alternatives over artificial ones.

This audience believes environmental soundness is good for business, however, will not pay for products that are environmentally-friendly or that assist in reducing carbon footprints. Simple Starters say they do not recycle or vote. However, they are more willing to join protests for causes they believe in.

They are very price-sensitive, Simple Starters do not enjoy baking or cooking nor are they open to trying new recipes.

This audience has minimal interest in syrup, let alone Pure Maple Syrup. Breakfast syrup importance, flavor, and collections are of little interest to this group. Less likely to buy Pure Maple Syrup from a farm stand, grocery store, or online.



Simple Starters – Advertising Openness

How to Reach Them with Advertising by Channel:

(audience does not trust mass media)

- Internet (29% reach, 1.5x average): video games, online videos, mobile apps, streaming radio, websites, Streaming TV, social networks are all rich avenues to reach this audience
- Radio (22% reach, 1.1x average)
- Cell Phone (22% reach, 0.8x average)
- Out of Home (17% reach, 0.7x average)
- Primetime TV (11% reach, 0.5x average)
- Newspaper (7% reach, 0.4x average)
- Magazine (5% reach, 0.3x average)
- Daytime TV (2% reach, 0.2x average)

Most-Frequented Content Sites:

- Facebook
- YouTube
- Instagram
- LinkedIn
- Netflix
- Wikipedia
- Twitter
- Pinterest
- Reddit
- TikTok
- Discord
- Hulu
- Fandom
- Twitch
- HBO

Simple Starters in their own words

How can Pure Maple Sugarmakers get more people like you to buy their products?

Prove that all natural flavors can be distinguished when artificial ones cannot.

Go out and show more of the work and have people help to see what the entire start to finish is.

I rarely, if ever, see advertisements, if ever, for pure maple syrup. But it is likely producers, even as a group, cannot afford expensive advertising.

I don't ever really see commercials for any kind of syrup: maple or corn. More commercials might help

Label it as such to make people know there getting higher quality

They could try to be more sustainable about it

The cost is so much more. Teach people less is more. Don't need to use as much

Do more marketing to show people you guys exist

Samples

Lower prices

If they introduce more knowledge about the products people would know and yet the sales will also increased

Maybe redesign the logo to entice people into thinking it's a new or improved product and draw them in more



Simple Starters in their own words

What else would you say or recommend to Sugarmakers?

It is interesting of the producing factor. If you go out and explore more to the consumers maybe they would get more of the whole process and products.

Free samples

I learned something new today and will apply my new knowledge to my weekly consumption.

Beat those Canadians.

I want syrup

Simple Starters - Opportunities

OPPORTUNITIES TO GROW PURE MAPLE TRIAL AND OCCASION:

This audience does not give a lot of thought to the groceries they are buying or the food they are consuming, however, do tend to prefer natural sweeteners, which can be a relatable way to reach this audience. Consider educating this audience on how they can incorporate Pure Maple Syrup into recipes and foods that are already familiar to them.

The Spanish-speaking contingent among this audience may improve awareness of Pure Maple as a consequence of the Spanish-language outreach recommended for the Syrup Explorers.

Of all audiences studied, this audience is by far the most-likely to play video games. Popular games Stardew Valley, Mon Bazou, Coral Island, HarvestCraft all feature Maple Sugaring simulation. Consider engaging the “virtual sugarmaking” community around these games in both online and offline events. Are IRL sugarmakers sugaring in Stardew Valley in the off-season?



Simple Starters – Comms Plan

	Barrier	Comms Taks	Channel
Living	Prioritizes family, but does not incorporate Pure Maple	Show ways families can incorporate Pure Maple into their memories	Facebook YouTube Instagram
Looking	Primarily Spanish speaking that is receiving additional outreach	Increase Pure Maple importance among the Spanish speaking community and create materials in their language	OOH Instagram Internet
Buying	They prefer to purchase natural sweeteners over artificial ones	Promote Pure Maple as a natural sugar alternative	Internet OOH Netflix
Sharing	Family is important to them but they are not sharing Pure Maple conversations with other families	Position a family gathering moment around Pure Maple	Instagram Facebook



Sober City SINKs*

(*Single Income No Kids)

Sober City SINKs – Audience Summary

16% of U.S. | 60% Female | 64% over age 45 | Slightly Lower Income

Sober City SINKs:	% Does not keep Table Syrup	% Keeps Table Syrup
% Does not keep Maple Syrup	56%	24%
% Keeps Maple Syrup	13%	7%



Sober City SINKs – Audience Summary



How Price-Sensitive are they?

This audience is more price-sensitive. This group cares about the environment and is willing to spend more on companies and products with a strong environmental ethos.

Product Attributes and Occasions?

While this group does not give much thought to the nutritional value of the food they consume, they are still careful about what they eat. They do not feel guilty when consuming sugar and are less likely to buy low-calorie sugar alternatives. However, they are more likely to say they don't have access to Pure Maple and have little interest in purchasing it.

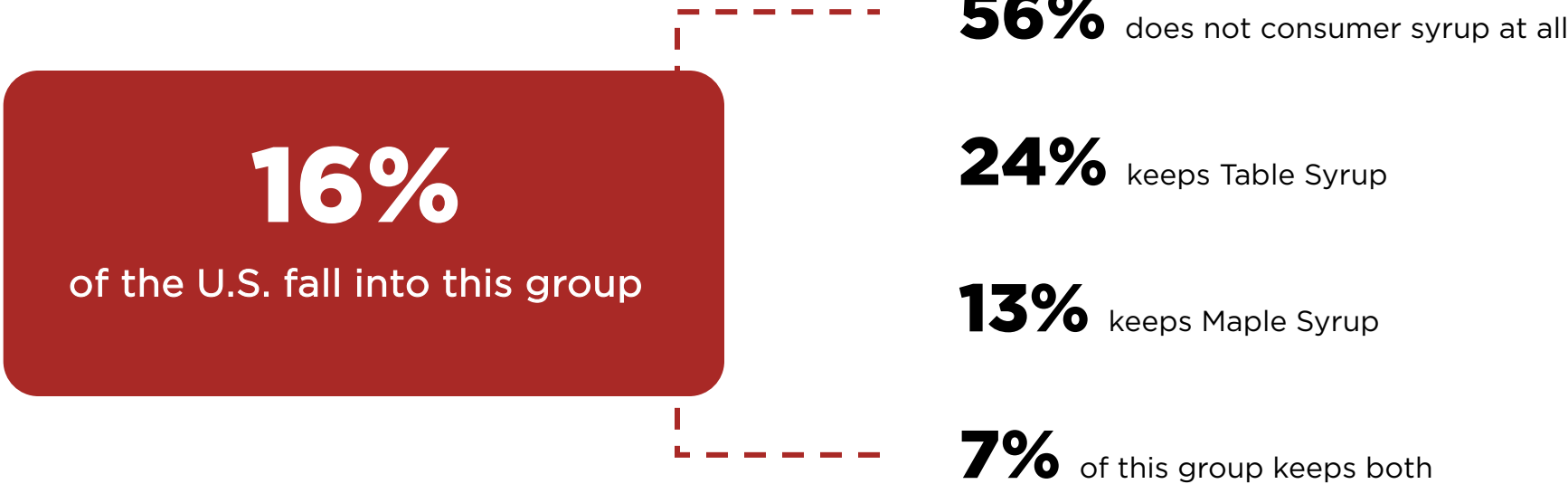
Where do they buy?

In-person at grocery stores.

How do we advertise to them?

TV, internet, and radio, where cell phone and out-of-home ads are least likely to reach this audience.

Sober City SINKs – Detailed Profile



Sober City SINKs – Detailed Profile

WHAT MAKES THEM UNIQUE:

The Sober City SINKs are distinctive because they don't drink alcohol, reside in urban areas, are slightly more diverse than average, and are much more likely to live in or head single-income with no kids (SINK) households. They are much more likely to be female (59%) with no children (65%), aged 45+ (64%), and are less likely to be married (34%), almost twice as likely as average to be divorced (18%). They are more likely to be lower-income (27% under \$20k), and much less likely to be employed (41% full or part time). They consider themselves more pessimistic about life and do not feel comfortable being unconventional.

This group are moderately price-sensitive shoppers. They are more likely to say that they do not have access to Pure Maple Syrup where they shop, nor do they have the urge to purchase the product for themselves or as gift. They do not prefer local or organic products and use non-sugar artificial sweeteners.

This group does not hold strongly to diet culture and does not think too in-depth about nutrition. They are indifferent about the inclusion of sugar in their diet, and are less likely to buy low-calorie syrup, eat gourmet, or pre-cooked meals. They consider fast food to be “junk” and consider the healthiness of the food they're eating to be more important than its taste. They do get regular exercise and tend to say that they are in control of their weight.

However, this group cares for the environment and thinks doing so is good for business. They will spend more to support environmentally sound products. They are more likely to recycle and attend protests.

Rarely if ever do they buy alcohol. They do not enjoy cooking nor baking and are not open to trying new things.



Sober City SINKs – Advertising Openness

How to Reach Them with Advertising by Channel:

- Internet (38% reach, 2.0x average)
- Radio (23% reach, 1.1x average)
- Daytime TV (20% reach, 2.1x average)
- Primetime TV (20% reach, 1.0x average)
- Newspaper (16% reach, 0.9x average)
- Magazine (13% reach, 0.8x average)
- Cell Phone (12% reach, 0.4x average)
- Out of Home (3% reach, 0.1x average)

Most-Frequented Content Sites:

- Facebook
- YouTube
- Instagram
- Soundcast.fm
- Wikipedia
- LinkedIn
- Twitter
- Reddit
- Pinterest
- Netflix

Sober City SINKs in their own words

How can Pure Maple Sugarmakers get more people like you to buy their products?

lower prices

Educating the public

Advertising

Put out more information about the process and benefits.

I think they should make it more refined and taste a little like Mrs. Butterworth. Because I love Mrs. Butterworth syrup on my pancakes and waffles

Appeal to the "urban" market. Which is a hard sell.

they need to grow more maple trees and tap them need to teach people how to do this

Raise awareness that this lie is being passed off I didn't know they were corn

Make a variety of different flavors

Lower their prices and initiate an advertising campaign to highlight the benefits of pure maple syrup.

I think more information about these processes in commercials or advertisements would be helpful.

I don't know. I don't use syrup at home because I don't like all the carbs for the food that syrup goes on.

A BETTER MARKETING CAMPAIGN GEARED TOWARDS A YOUNGER GENERATION.

Sober City SINKs in their own words

What else would you say or recommend to Sugarmakers?

I will look into more pure syrups next time.

Maple syrup is superior to other types

Just to not give up and keep thinking of more innovative ways to keep sales up .

Yes I love maple syrup but I watch how much I eat due to my health issues

Maybe if syrup can be like honey and it helps with local allergies?

Only that I think ads would help get the maple industry noticed.

Made me think about different maple syrups

Just think the consumer's cost makes them not buy it, which is too bad because they would certainly enjoy the flavor more.

labels are important

I am on a strict calorie intake. I'm not crazy about pastries, they feel like empty fat intake. I don't like sweet breakfast. So appeal on a dinner level. Maybe as candies or add a hot spice to it (clove and something in the pepper family maybe)

I have never had pure maple syrup but now that I've been informed...I will try some.

If they made it with monk Fruit, I'd buy it

Sober City SINKs – Opportunities

OPPORTUNITIES TO GROW PURE MAPLE TRIAL AND OCCASION:

While this audience does not have occasion to use syrup, they may be open to Pure Maple products in other forms: pure maple sugar, pure maple candies, etc. Many in this audience are on fixed-income and likely public assistance and prefer food products available with public subsidies. In most states, Pure Maple products are not WIC-approved. However, many Pure Maple producers or resellers may be eligible to receive WIC/FNMP payment as small farms licensed to sell in farmer's-markets and CSA formats. Reach this audience by working through these vehicles. Also, explore partnerships with not-for-profits focused on youth engagement who sell products in cities (e.g., BSA Scouts, Girl Scouts, Jack & Jill)

Like their Sober Locavore SINK counterparts from the country, this audience consumes a lot of TV. To reach them and improve mental availability of Pure Maple products, consider launching a reality show centered around the Pure Maple Syrup production industry and the families at its core.



Sober City SINKs – Comms Plan

	Barrier	Comms Taks	Channel
Living	Live by eco-friendly standards but doesn't understand Pure Maple's role in this	Work to educate consumers on Pure Maple's positive impact on the environment	TV Internet Radio
Looking	They don't have the occasion of using syrup, but would be open to try Pure Maple products in other forms	Show how Pure Maple can be enjoyed in daily forms: Pure Maple Sugar, Pure Maple Candies	Facebook Instagram Internet
Buying	They often use governmental assistance programs that do not include Maple Syrup subsidies	Partner with public assistance organizations to help maple producers be eligible for this programs	Newspaper
Sharing	Pure Maple could be far from their routine	Create a perception of Pure Maple so they can use some for very special occasions	Facebook YouTube Instagram

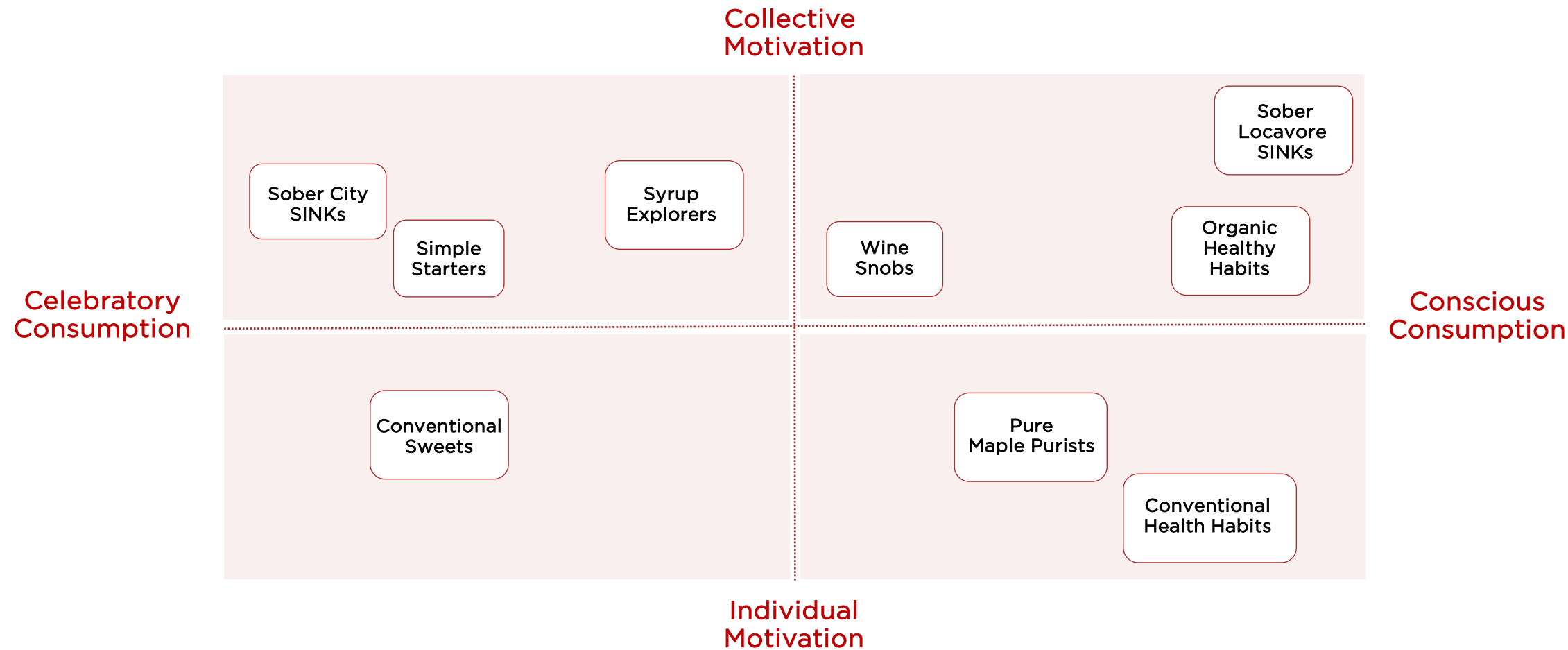


The Way Forward



The Maple Range:

From joy to consciousness; From individual to collective.



Product Ideas

Highlight quality value	Understanding benefits	Recipes/ Maple Menus	Baking	Different forms of maple	In-Store Tasting
Pure Maple Purists	Organic Healthy Habits	Sober Locavore SINKs	Sober Locavore SINKs	Sober City SINKs	Organic Healthy Habits
Conventional Sweets	Conventional Health Habits	Syrup Explorers		On-the-Go Packets	
Wine Snobs	Simple Starters	Conventional Sweets	Whiskey	Syrup Explorers	
Organic Healthy Habits	Organic Healthy Habits	Conventional Health Habits	Wine Snobs	Refillable and Reusable bottles with local farms	Partnership with Youth Engagement Organizations
			Energy	Syrup Explorers	Sober City SINKs
			Syrup Explorers	Organic Healthy Habits	



Experience Ideas

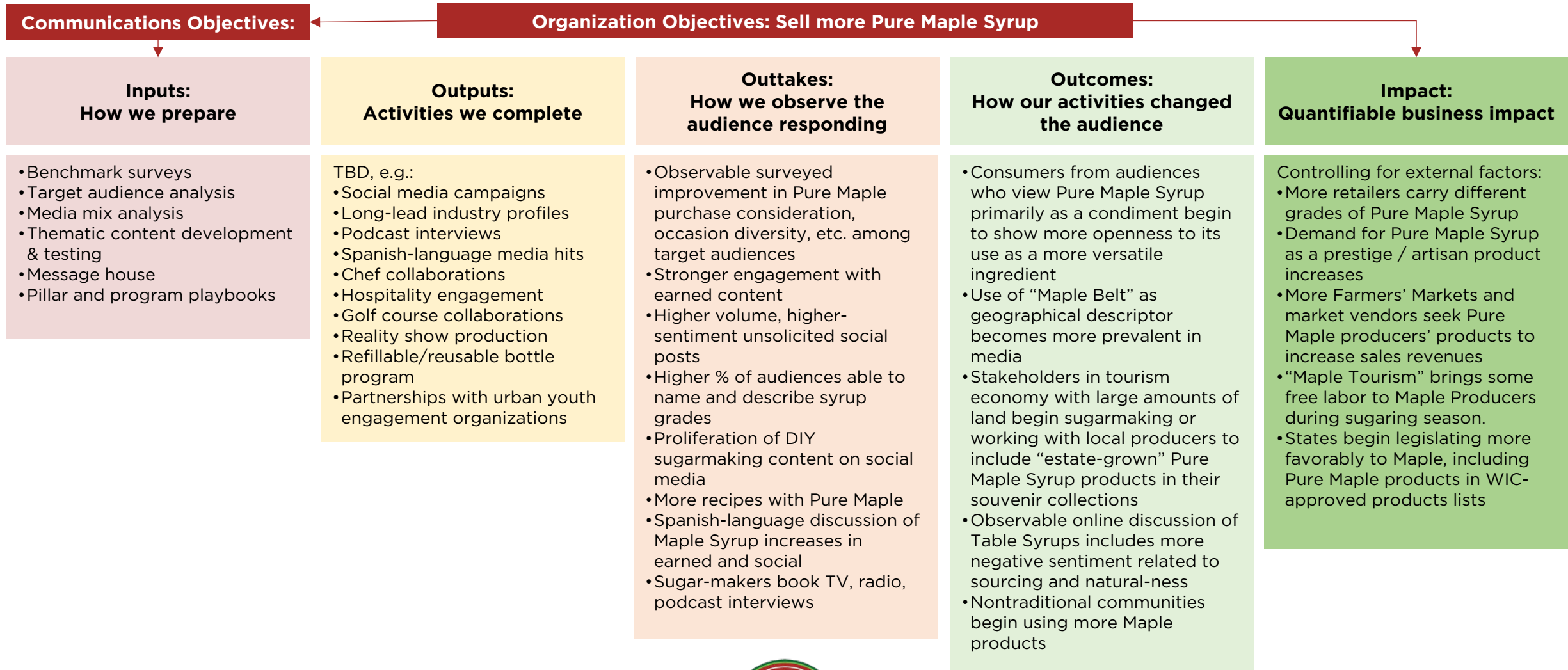
Regions/ Maple Belt	Hotels	Impact on Environment	Create community to share conversations	Develop Spanish Materials
Sober Locavore SINKs	Wine Snobs Syrup Explorers	Sober City SINKs		Syrup Explorers
Wine Snobs	Premium Restaurants	Wine Snobs	Sober Locavore SINKs	Simple Starters
Pure Maple Purists	Wine Snobs Syrup Explorers	Organic Healthy Habits Sober Locavore SINKs	Pure Maple Purists	
Conventional Sweets	Pure Maple Purists	Syrup Explorers	Syrup Explorers	Highlight family moments
Conventional Health Habits	Golfing	Reality Show	Organic Healthy Habits	Simple Starters
	Wine Snobs	Sober Locavore SINKs		



Measurement



Measurement Framework



A photograph of a snowy forest with several metal buckets hanging from tree trunks, suggesting a maple syrup collection site. The scene is covered in a thick layer of snow, and the trees are bare, with some light-colored bark visible. The buckets are made of metal and have lids that are slightly ajar. The overall atmosphere is quiet and serene.

Thank You