

NYSMPA Focus Groups

May 6, 2022

GOLIN



Methodology Overview



WHO

General population who bought maple syrup in the last year, and at least one person who can correctly identify pure maple and table syrup brands in each group. Each market consisted of one group of Millennials and younger, and one group of Gen X and older.



MARKETS

Boston, MA

Atlanta, GA

Dallas, TX

Los Angeles, CA

Seattle, WA

Minneapolis, MN



FIELDWORK DATES

April 11 – April 20

KEY FINDINGS

Shoppers have knowledge of maple syrup, especially the older generation. Many people know that there is a price difference, as they get their information about syrup from the syrup aisle.

Brand loyalty varies but is built over time. Growing up with a product is the biggest reason to use it, with taste and quality being the next biggest reasons.

Serious or hyperbolic messaging doesn't bode well. Because people are not passionate about syrup, but it is associated with warm memories, serious messaging and hyperbole don't work well.

Neutral statements, such as the basic descriptor of pure maple and table syrup, come off strongest. They make respondents feel informed and empowered with new information. They also receive the least pushback.

Versatility is a strong proof point. It encourages people to try new things, interesting them. For those already using pure maple in various ways, it validates their experience.

Experiences and sales would lead people to try pure maple syrup. People who have not tried the product want to taste and see it after hearing more. They can see themselves buying syrup if they like it after they taste it, but also want to eliminate risk by buying during a sale or with coupons.

Market Take-Aways

Those knowledgeable about pure maple syrup tend to come from the Northeast, but those in northern areas like Seattle are just as knowledgeable due to their proximity to Canada.

Other knowledge of pure maple syrup is driven by growing up with the product, despite location, or based on the level of how food conscious someone is.

The older groups sampled (Gen X+) were more knowledgeable about pure maple syrup. They also tended to be more experimental and exploratory with foods of all kinds.

People in Western markets tended to be food conscious. They spoke more about the ingredients in their foods, as well as the level of processing.

The Southern groups tended to know the least about pure maple syrup, but also had some idea it was not from their region. However, those originally from maple-producing areas who have migrated south stood out on knowledge.

General Shopping Take-Aways



Shoppers can generally be put in two categories: those on a mission and those who are “fishing”.



Some shoppers come into the store and get only exactly what they need, seeking to get in-and-out. Others come to try new products, and meander through the store, enjoying the time spent looking for nothing in particular.



“I've got usually like three to four days of meals planned and I'll just go in and like it's an operation.” (Los Angeles, Older)

I like to try new things. People have called me a gourmet cook though. It's never been an official thing, but, but it's just by myself, I will order just enough to get through the week what I need. Every now and then I have to go in and then that's whenever I splurge. I do have a tendency to look up and down to see if there's anything that catches my eye.” (Los Angeles, Older)

“And then the other place that I have to say, which is another impulse buy place, Costco, whenever I see something, it doesn't have to be a sample time like, oh, I haven't seen this before. And so I'll get it because I know number one, I can get to, try and if I don't like I can return it.” (Seattle, Younger)

Brand loyalty is a strong driver of purchase. It's closely tied to the customer's knowledge of the product.



Customers know the taste and quality of their preferred brand.

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“Bacon is one item that I would never substitute a store brand name for. And it has to be the right bacon, like the name brand bacon. Like Peter alluded to earlier about ranch dressing. That's another item that I cannot substitute for...the taste, the quality taste, the quality. Some ranch dressings just shouldn't be on the shelf.” (Dallas, Younger)

“For me, I'm like married to certain brands. For certain items. And ketchup is only Heinz. I will not buy another brand. It doesn't taste the same.” (Atlanta, Older)



Loyalty and habits are built over time with a product, and growing up with a product is especially important.

Growing up with a food builds familiarity and trust. Purchase habits are also influenced by the past.

“I'm particular on Kraft because that's what we grew up with. So getting the store brand, I can taste the difference, even though my husband swears up and down, ‘I put that in [the fridge] and [you] didn't know the difference.’ I did, I just didn't say anything.”
(Dallas, Younger)

“Dukes mayonnaise. I grew up with it. It's still a comfort food to me.” (Atlanta, Older)

“As far as a budget, I grew up with seeing my mom just really kind of grab almost like a lot of generic items, having a big family. We did always, um, buy the cheaper items. So it's kind of embedded in me whether I like it or not.” (Dallas, Younger)

And this holds true for syrup, too.

Most people grew up with table syrup. They are used to the taste, consistency, and look of the product and bottle.

“I grew up with table syrup. When I moved to new England, I thought syrup was supposed to be thick. So when I see the pure maple syrup, it seems a little thinner because it doesn't have the artificial stuff added.” **(Boston, Older)**

“So if I'm using syrups, it's gotta be Karo. Karo syrup is gonna be my main syrup or if it is a pancake syrup, I will do store brand on that, and most of the time it's gonna be Kroger on that. But if not, it's going to be, Mrs. Butterworth's. That's what I grew up on. That's what I'm used to. That's what my house likes.” **(Atlanta, Younger)**

“It's definitely makes me feel a certain way about purchasing garbage table syrup. But it's kind of what I grew up on. It's what I know. And Hungry Jack, I think is the brand.” **(Atlanta, Younger)**

“When I was a kid, I remember my dad always had pure maple syrup. I grew up in New York, so he gets syrup from Vermont.” **(Atlanta, Older)**

New products interest most people, but there is no clear answer on what gets their attention.

Shoppers vary on what types of products and packaging catch their eye.

“What catches my eye is in my two favorite food groups, which is sweet number one. Salty. And that's pretty much all in the snack aisle or definitely the bakery aisle too.” (Los Angeles, Older)

“Yeah, I think there's also utility, in understating things in something, in you know, because you go to grocery store and everything's like just a panoply of color and explosion of like new, big pow pow pow. There's also something to be said for something that is like brown paper or understated or like fights against kind of the explosion of like sensory overload that what might be subjected to. I'm always intrigued by that; by packaging or by statements that say less than and are a little standoffish.” (Los Angeles, Older)

“I'm a sucker for it, but like the packaging, the colors, they like put the whole thing together. It has to be appealing to my eye to even have me notice it.” (Seattle, Younger)

“When it's holidays time. That's when it's the most difficult, not to buy things that are different and holiday themed and you just wanna buy all the good things and fun stuff for the family and it's very distracting.” (Los Angeles, Older)

Syrup Perceptions and Habits



Many shoppers have some basic knowledge of maple syrup, most often indicated by price differences.

Shoppers, despite their knowledge level about pure syrup, know there are stark price differences in the syrup aisle.

“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.”

So it was like a \$1.89 for the cheapest syrup, and I don't know what if it was Aunt Jemima or like target brand, but the maple syrup started at like 10.99 or um, all the way up to like 13.99.” (Minneapolis, Younger)

“It makes me think. No wonder the price difference. I had no idea that there was no maple syrup, in table syrup.” (Minneapolis, Younger)

[Pure syrup] is so strong. With Aunt Jemima, its really a good price point and tastes good.” (Atlanta, Younger)

“I knew about this [table syrup’s lack of pure maple] and you can just tell, like you said the price difference and it just makes sense. It wasn’t too shocking.” (Minneapolis, Younger)

Most people agree they don't use syrup often, but they also agree they like to keep it in their house.



Syrup of any kind doesn't incite passion, mainly because its not used all the time. But most people tend to have it in their house anyway.



“I just have the pure, but right now that's what I have in my fridge or my pantry. I think the last one we had was Mrs. Butterworth's. We don't use it a whole ton.” (Dallas, Younger)

“I really don't eat the syrup - my kids do.” (Minneapolis, Older)

“I don't know if Aunt Jemima or the new one has that pure maple syrup or not, but that's typically what we have. We haven't bought it since the name changed, just because maple syrup lasts quite a long time in our household.” (Dallas, Younger)

“I'll make pancakes for the family and stuff like that, and they'll use the regular stuff in it. I don't eat it too often. I'll put some fruit on it or something like that instead.” (Los Angeles, Older)

However, the feelings people do have toward syrup are warm and evoke memories.

Syrup, whether table or pure, reminds people of good times with family and good meals.

“It brings good memories of things that I have made with it that have tasted great.” (Los Angeles, Older)

“I mean, people buy Idaho potatoes. I think people would buy Vermont maple syrup that has a very woodsy, you know, connotation and farms and natural beauty.” (Los Angeles, Older)

“it's kind of like comfort kind of food. It's warm and it's sweet and it's like a comfort through food.” (Boston, Older)

“I have personal nice memories of it. Been there several times fishing and I actually visited one of those farms where they tapped the trees.” (Boston, Younger)

Having pure syrup doesn't mean you won't have table.

Most people who have pure syrup still have some form of table syrup as well. They use table syrup to please kids, guests, or other members of the family.

“I've got a couple kinds of syrup. I have the real kind and then I have a sugar free kind.” (Los Angeles, Younger)

“Mrs. Butterworth's. And usually that's for the kids that come around. Nieces and nephews, that's what they want. But you know for me, generally it's the hundred percent.” (Atlanta, Older)

“I think I have some around. If one of my sons were to come home and suddenly make something that required it and, it's just there.” (Boston, Older)

And even those who buy pure syrup have a lot to learn.



Consumers of pure syrup have more information than others, but there is still room for growth.



“It is a little less sweet than the table syrup, but I feel like table syrup is more watery than, than pure personally.” (Atlanta, Older)

“Honestly, I thought that maybe drilling into the trees to get syrup from 'em would not be good for the environment. But maybe that was foolish.” (Atlanta, Younger)

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

Pure syrup users tend to be adventurous with their cooking.

Pure syrup users tend to use syrup for far more purposes than table syrup users, which comes along with the product.

“I saved the real maple syrup for decadent times or in my like marinades and stuff like that.” (Minneapolis, Older)

"I used to be a lunch lady and we would make chop up butternut squash and have a glaze that put cayenne pepper, a little bit of olive oil and maple syrup. And you coat your squash and then you roast it in the oven and that's really good." (Minneapolis, Older)

"I use it sometimes in baking or making granola." (Minneapolis, Younger)

“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." (Los Angeles, Older)

But pure maple syrup isn't seen as a product for kids.

Kids aren't seen to appreciate the taste, texture, and cost of pure maple syrup. They also don't want to fight their kids over a more-expensive syrup.

“Then I think as I got older and just realized that Aunt Jemima, the store brand syrups, are just corn syrup with a little flavoring. As you grow up, you can appreciate the subtlety of sap from a tree.” (Atlanta, Older)

“I knew my kids didn't really like the flavor of the real maple syrup...my guess is that it wasn't as sweet as what they were used to when they would try it out there in the field and whatnot.” (Minneapolis, Older)

“Kids will eat syrup no matter who makes it.” (Boston, Younger)

“I have these really young kids, so right now they're not thinking about healthy choices, they just want sugar.” (Minneapolis, Older)

Table syrup packaging is more top-of-mind than pure syrup packaging.



Packaging comes to mind for most consumers when thinking about pure or maple.



“Like Mrs. Butterworth looks like a lady or whatever. I always kind of draw my eye to that for some reason... Just because it's different. It's not just a little bottle.” (Minneapolis Older)

“I don't see commercials anymore, and I don't really see ads for it. I just go by what I see in the store. That's all I have to go by.” (Minneapolis, Older)

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

“I just remember miss Butterworth's bottle going across the table. I think the kids want to see if she actually wiggled across the table.” (Atlanta, Older)

What would make someone try pure maple? Experiences and deals.

Sales motivate people to try new products and, the experiences open people's hearts and minds to new products.

“I would say if it's on sale, that's definitely a drive.” (Los Angeles, Younger)

“For me, I would say affordability and convenience. Am I able to find coupons for this purchase?” (Boston, Younger)

“A lot of times, if you go to like carnivals and stuff like that, they have little vendors, you can taste it, and taste test, and get the thing. And then sometimes they're sold in store. Sometimes you just have to get it at the vendor there. They used to back in the day when you have taste testing in the grocery stores.” (Minneapolis, Older)

“I'm always looking for new experiences. When I leave this world, I can't take anything with me but my memories. And so, I would make memories, tastes, smells, things that I can see.” (Los Angeles, Older)

Messaging and Maple



Telling table users their syrup is fake doesn't convince them to switch.

Calling table syrup 'fake' should tread lightly because people might associate pure maple with condescension.

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“If you're telling me everything I had until now is fake, then I like the fake stuff.” (Dallas, Younger)

“I haven't tried before, so I don't know the authentic straight from the tree. But I probably would still go for the fake stuff because it tastes better and it's cheaper.” (Atlanta, Older)

“To me, it was real negative to call out fake stuff. I don't feel that's necessary. And too much of our world. You should be able to sell yourself on yourself. Like really? Even in advertising maple syrup, you're going to put down somebody else? You stand on your own merit without having to criticize fake stuff?
(Minneapolis, Older)

“Buying American” also struggled to gain traction as not everyone sees pure maple as American.



Shoppers see maple syrup as Canadian and if they do connect it with the U.S., it is usually tied to Vermont. They don't think it represents the country as a whole.



“Food really unites us and it really who doesn't want to have authentic food? But when I think of maple syrup, that's Canada, baby: hockey, geese, and maple syrup. I know Vermont for it, but I just don't necessarily equate that.” (Minneapolis, Younger)

“I don't think of maple syrup when I think of American culture. I view it as a like Canadian product and Vermont. I think of that as well, but that's only one state. That's what confused me a little bit.” (Seattle, Younger)

“It's like, when have you ever heard of anybody saying, ‘oh, that good old American maple syrup?.’ Like ‘oh, I'm going to go to a ball game and get my maple Sunday.’ You just a don't hear that. It's just weird. (Minneapolis, Younger)

“I think to say that it represents all of America - like if you travel abroad, they're not like, ‘Hey, you're where the maple syrup comes from.’ You know?” (Dallas, Older)

Messaging about health benefits invited skepticism.



Some people find the messaging hard to believe, while others emphasize that syrup is just 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.”
(Dallas, Younger)

“I guess I never thought about any of the syrup having nutritional value. To say that one is higher nutritional value? All syrups aren’t imitation sweeteners.” (Minneapolis, Older)

“I guess I’m well aware of the fact that pure maple syrup is a single ingredient and there’s plenty of other things in my life that have artificial and synthetic ingredients. I’m not that much of a health freak I guess.”- (Boston, Older)

People want syrup to be simple and warm, not serious.

Messaging about the economy or fake news brings people down. Hyperbolic statements can also have that effect.

“Companies can get carried away when they describe how their product impacts your life.” (Boston, Younger)

“[Being told] tasting true pure maple syrup translates into, oh, this has given me this epiphany of appreciation of greater things in life. That's why I was like, huh?” (Atlanta, Older)

“I'm not really interested in supporting the country's economy. I got to support the economy of my house. And to buy an expensive syrup, that's not it for me.” (Dallas, Younger)

“I think just as soon as I see fake news, like it's just associated with politics for me. And so the fact that [the message is] just talking about maple syrup, there was a shocker.” (Boston, Younger)

People want to help the environment and are interested in learning more.

Shoppers like eco-friendly options, and generally want to know more, no matter the level of detail shared.

“Is the Costco brand of maple syrup really an eco conscious choice? Like, are they shipped from the East Coast to Minnesota when I could just buy it at the little farm down the road? I want to know more before I started telling people that was why I chose this syrup.” (Minneapolis, Younger)

“I just think having a healthy environment - I always get nervous because I don't want to appear to be too preachy - but I think we can all benefit from a healthier environment. Just for me personally, I like to hike. Like you hike through forest. I see the beauty, the tranquility, the sounds of it. If that was the case, I wouldn't say it's a major plus, but it would be like a solid plus.” (Seattle, Older)

“It's not just making profit and sending out the product. They're making the best product. The best natural product or natural. It is providing, giving back. Giving back is what I would say here.” (Seattle, Younger)

The idea of supporting small businesses and family-owned businesses works well with shoppers.

Supporting family businesses and small businesses worked better than a general "buy local" message.

“I do like the sentiment of if. If it was like a family-owned farm, especially like being in new England, I like that.” (Boston, Older)

“I guess the way they phrased it, they said family business, they brought back a memory of when I visited one in Vermont,” (Boston, Younger)

“We don't have maple trees in Texas to my knowledge, so we're not necessarily supporting local business here. It's absolutely important if I lived in Vermont or New Hampshire. That would be absolutely important to me and probably be a factor in the purchase, but here in Texas, it's not really relevant.” (Dallas, Younger)

“So I know it's gonna cost more, but thank God for all of these small mom and pops, because that's what made, first of all, it's made our America great. It's what we're built on. Every country in the world, started with the mom and pops. And they're not big corporate owned and they are quality.” (Seattle, Older)

Versatility is the key to making pure maple shine amongst consumers.



For those who didn't know about pure syrup's uses, this sparked their imagination. For those who did know, it validated their experience.



“Interesting because I knew baking, but I guess grilling maybe, with some fruit?
“But cooking and grilling, I'm thinking: what else could I do with this syrup? I kind of want to look up some recipes and see how I could use it. Just the word 'versatility.'” (Los Angeles, Older)

“I actually liked that it included versatile, but part of that is because I now in the last couple of years have more knowledge like how to use it, different ways. I think prior to that, I might have been like, ‘what are they talking about?’ Versatile? Like it's the least versatile food, but now that I'm aware of it, like I agree with that part.” (Boston, Younger)

“Part of me is like, duh, maple syrup is a sweetener. To be honest, I never really thought about using it in cooking. I mean, I put it in whiskey before.” (Seattle, Older)

“When I saw the marinade part, I've done that before, when I made ribs and I used it as part of the ribs there. So it gives it a kind of a sweet component versus the rub that's on there. So when I saw all those things, I was like, yes, I'm actually normal on this one! There are people out there who will do this! And it does have a good flavor, so, and I encourage anyone to try it.” (Seattle, Younger)

Maple as a single-ingredient is one of the strongest proof points.



The basic description of maple syrup and table syrup strongly resonated. It empowered shoppers with knowledge.



“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.”
(Seattle, Older)

“[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.'” (Atlanta, Younger)

“I haven't had the pleasure of tasting pure maple syrup, but that sounds awesome.” (Seattle, Younger)

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

The pure nature of syrup ties into authenticity and “the real thing”.

When shoppers learned about table syrup’s difference than maple, they had an appreciation for maple’s simplicity and pureness.



“I like it using the word authentic. It's not artificial. It's not all that chemicals. Like the glucose, the high fructose corn syrup. It's just the coming from the trees. The basics.” (Seattle, Older)

“I was thinking the word artisanal, that word that they use because you could travel and taste the difference from different areas of pure maple syrup like you do when you travel and taste wine and all that kinda stuff or chocolate.” (Seattle, Older)

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

“I think people are looking for always more authentic foods, within a certain demographic. I think that the Mrs. Butterworths of the world, the rack of table syrups certainly give off the impression that this is real maple syrup. 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.” (Seattle, Older)

Where we go from here



- Quantitative survey testing the ideas about the customer journey and messaging
- Strategic plan and messaging based on these findings
- Communications plan to be developed informed by all previous research

Thank you

