

## Study Suggests Promising Ways to Market Maple

*Helen Thomas, NYS Maple Producers Association*

Since 2005, USDA indicates maple syrup production has increased 341% across the U.S. and 369% in New York. As production is projected to increase, consumer demand must increase as well. Increased demand for pure maple products will benefit brands and the industry overall.

A study commissioned by the Pennsylvania Maple Syrup Association found that purchase decisions for maple syrup generally occur at the store shelf with little thought for brand or product attributes. Pointedly, consumer attitudes suggest confusion regarding the identity of pure maple syrup. To evolve, there is a need to intensify research and promotion efforts around consumer awareness and attitudes.

In 2020, the New York State Maple Producers' Association, in cooperation with the NYS Department of Agriculture and Markets, applied for and was awarded a USDA *Acer* Access and Development Program grant to conduct market research on the US consumer maple target audience. The project was designed to expand research, education, and extension efforts involving market sizing, audience research, and message testing, development, and planning to: 1) identify market opportunities, 2) optimize messaging, and 3) develop a market promotion and evaluation plan.

As a result of this work, the indus-

try will be equipped with education, marketing tools, and methods to grow the awareness and relevance of pure maple syrup among audiences representing the greatest opportunity. The purpose of this work is to develop marketing tools and methods to increase the awareness of, and a rationale for, choosing pure maple syrup among audiences representing the greatest market opportunity. The program will achieve this goal through the development of research-driven messaging, market promotion strategies, and communications planning.

The pandemic caused delays in starting the project. An RFP to hire a market research firm was developed with input from several maple industry stakeholders from across the US and issued in summer 2021. The firm chosen to carry out the project is Golin (<https://golin.com>).

The work started with in-depth interviews with ten maple industry stakeholders. These interviews were conducted to determine what the maple industry itself felt were strengths about maple to message (market) and what challenges the marketing of maple confronts. Findings included:

- Producers are so knowledgeable about maple that they have a hard time knowing what to talk about with the average consumer.

- Having table syrups and pure maple syrup on the same grocery shelf confuses consumers.
- Consumers not from maple producing regions don't know how to tell what is pure maple syrup.
- Producers love the time spent outdoors and would like to see that as part of messaging.
- The association of maple with autumn could be a factor in making maple viewed as "seasonal."
- There is acknowledgement that the cost of maple syrup is a deterrent to some buyers.

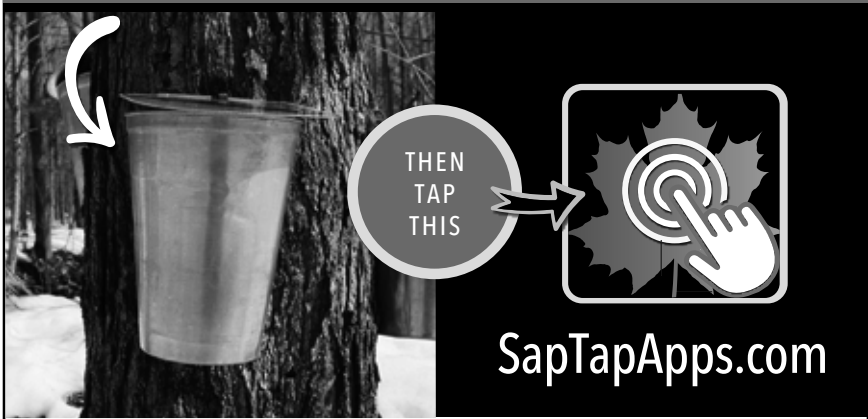
Golin next conducted a survey of

1,684 Americans in a nationally representative sample. The objective of this survey was to better understand perceptions of the differences between pure and imitation (table) syrup, what kind of messaging around pure maple is attractive to consumers, and what differentiates prospective buyers.

Some key results of this nationwide survey:


- Only about 15% of consumers are able to identify pure maple syrup. About 26% of consumers admit not knowing what pure maple syrup is. The remaining 59% of consumers say they know what maple syrup is, but when presented with brands of both table syrup and pure maple syrup cannot tell the difference.

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- Those consumers who know maple syrup tend to be Gen-X or older (40+), live in the Northeast (Maine to Pennsylvania) and have a household income greater than \$100K. They also use maple syrup in a variety of ways, not just as a topping.
- Consumers tend to be creatures of habit. 78% report that when grocery shopping they tend to buy the same brands and foods each trip. An important corollary to this is that people tend to continue to buy what they were served as children, so if they grew up with table syrup, they have learned to like the taste and texture of that over pure maple syrup.
- 77% of consumers are interested in foods that can be used in a variety

of ways, so when presented with the idea that maple is more than just a topping, they were interested.

- When asked what statements were the most persuasive about maple syrup, consumers were most interested in the fact that maple is a single-ingredient, all-natural food, followed closely by the statement that maple is a versatile sweetener that can be used in a variety of ways.

The next step of the research was to conduct live focus group interviews. 12 interviews were held in April 2022, two each in Boston, Atlanta, Dallas, Los Angeles, Seattle, and Minneapolis. Additional criteria were applied to be sure all age groups of consumers were covered, and that all had bought some



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form of syrup in the last 12 months. Key findings included:

- 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.
- It is associated with warm memories, but because people are not passionate about syrup, 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.
- Consumer knowledge of pure maple syrup is limited and muddy. These conversations confirmed that many consumers do not know the differences between the various table syrups and pure maple syrup on the grocery store shelf.
- Messaging about health benefits invited skepticism. Some people find the messaging hard to believe, while others emphasize that syrup is just sugar.
- Experiences and coupons would lead people to try pure maple syrup. People who have not tried the product want to taste and see it after hear-

ing 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.

The data from the work to this point strongly suggested that market messaging would be most effective if it emphasized the single-ingredient, nothing added, all-natural attribute of maple. Another positive message might be to emphasize versatility as an ingredient that adds interesting flavor as well as sweetening to foods. Since the consumer is not able to easily distinguish pure maple syrup apart from other syrups on the grocery store shelf, Golin suggests a visual "mark" that identifies maple syrup that could be used by all maple stakeholders on their label. The next study was structured to test variations of these messages and also the consumer appeal of different designs of a mark.

Golin conducted a survey among 3,123 Americans, ages 16+, in a nationally representative sample during August 2022. About 32% of the public don't care about what is in the food they eat, and do not present an opportunity as a target population for the sale of maple syrup. The other 68% are reachable to differing degrees – those most interested in cooking and with higher incomes are the most reachable, but all were open to trying maple syrup.

From this survey, it was found that two messages in combination stimulate interest in 92% of the potential consumers. The messages:

- The only ingredient in each bottle is

pure maple syrup.

- Pure maple syrup is a delicious alternative to refined sugars, simple syrups, dressings and other typical sweeteners (like honey).

The “mark” image that was the most popular was the image in the center of this page.

A strong reason for starting to use an industry-wide label mark for maple is that people relate to things visually, and the mark would allow quick identification of pure maple products. We propose that the maple community consider working together to incorporate this mark on retail packaging in the future. The mark would of course be available to any US packer of pure maple for sale in the US as it has been developed using federal funding.

The project to date has accomplished the following two goals: 1) identify market opportunities; and 2) optimize messaging. We are beginning work on goal 3, to develop a market promotion and evaluation plan. To meet that goal, we have begun to explore what market channels are the most effective for reaching consumers about food. Initial research done during this last survey indicates nearly one-half of people use the internet to learn about using new ingredients, particularly food websites. Word of mouth and tv/streaming con-

tent are also popular ways to find out how to use new ingredients. A surprising finding is that consumers would trust hearing the messaging from someone in the maple industry more than from a chef or celebrity. In the next few months of the project, we will be developing some sample ads and also

proposing methods of evaluating their effectiveness.

The key take-aways about marketing from the study to date indicates that, when advertising, the maple industry should:

- Focus on consumers that place value on food quality and the experience of food.
- Lean into the single-ingredient message first to increase awareness, and then into the message of versatility to increase consideration and purchase.
- Meet consumers where they go for information to introduce the “why” and then couple it with key spokespeople to show the “how.”
- Use a voice that is directly from the industry to establish authority and credibility for the message.

