

# PA Maple Syrup Council

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Producers and Hobbyists Web Survey  
Fall 2017

Prepared by Strasser and Associates

# Introduction

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## Methodology

- Web survey was conducted among Producers and Hobbyists in Fall 2017
- Sample was provided by Maple Syrup including
  - 133 total with e-mail
  - Initial survey was sent 9.12.17 with three reminders sent through Sept and early Oct.

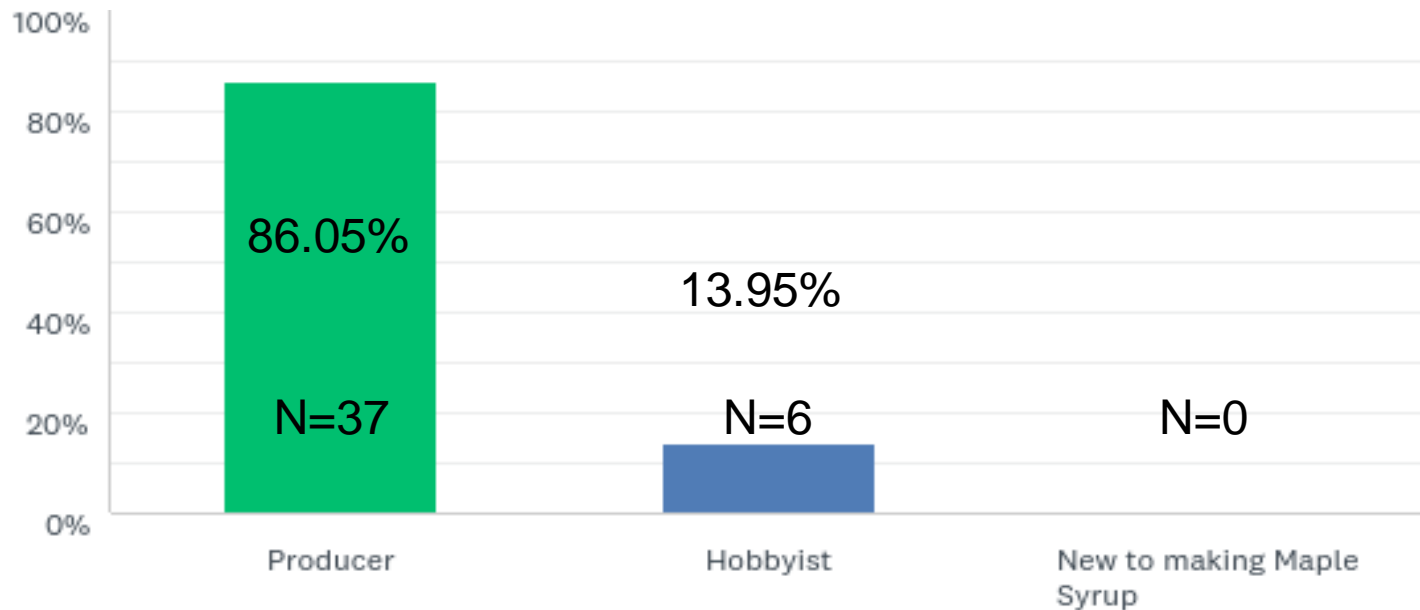
# Introduction – Cont'd

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- Survey results
  - 69 members opened the e-mail
  - 48 members never opened e-mail
  - 12 member e-mail bounced back
  - 4 members opted out – did not respond
  - 42 completes and 1 partial complete

# Do you consider yourself to be a?

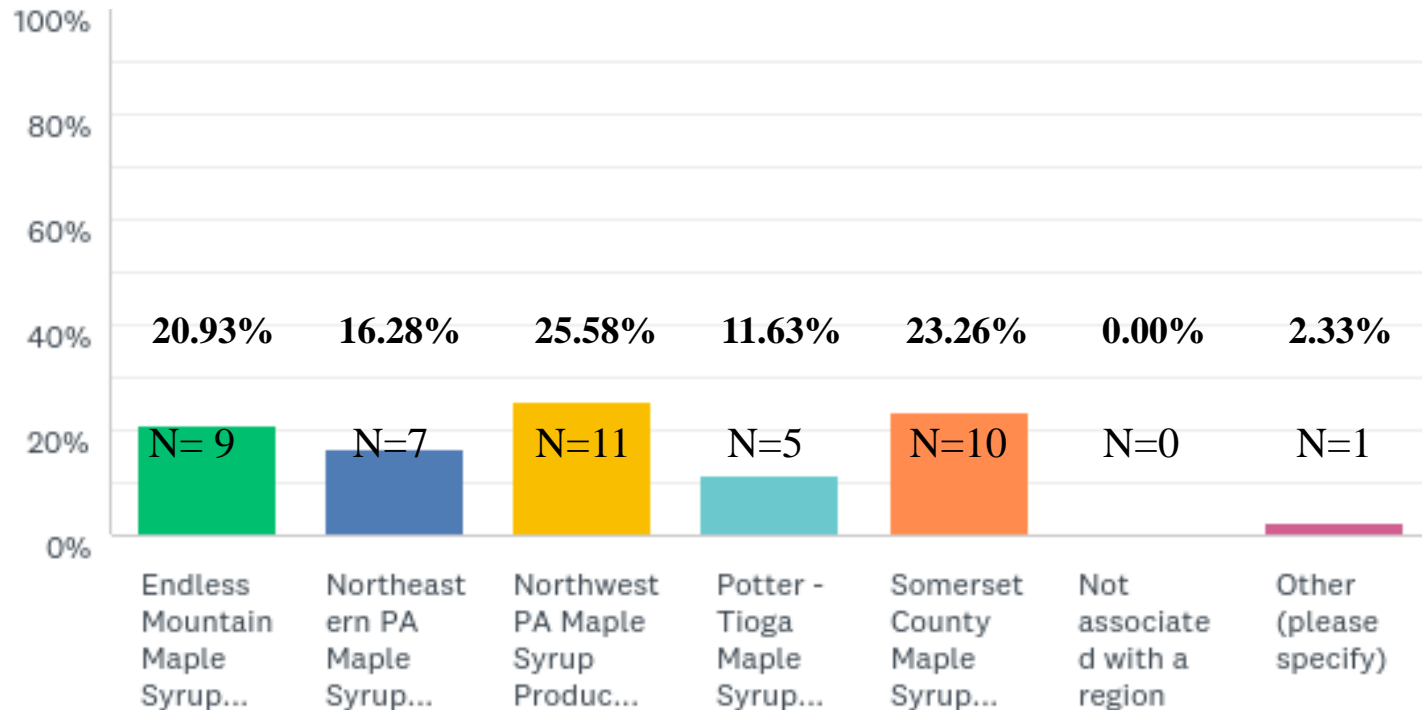
N=43



Majority of responders were producers with little response from the Hobbyist group. Potential for the Maple Association to reach out and engage Hobbyists and non-responding producers.

# In what Regional Maple Association do you reside?

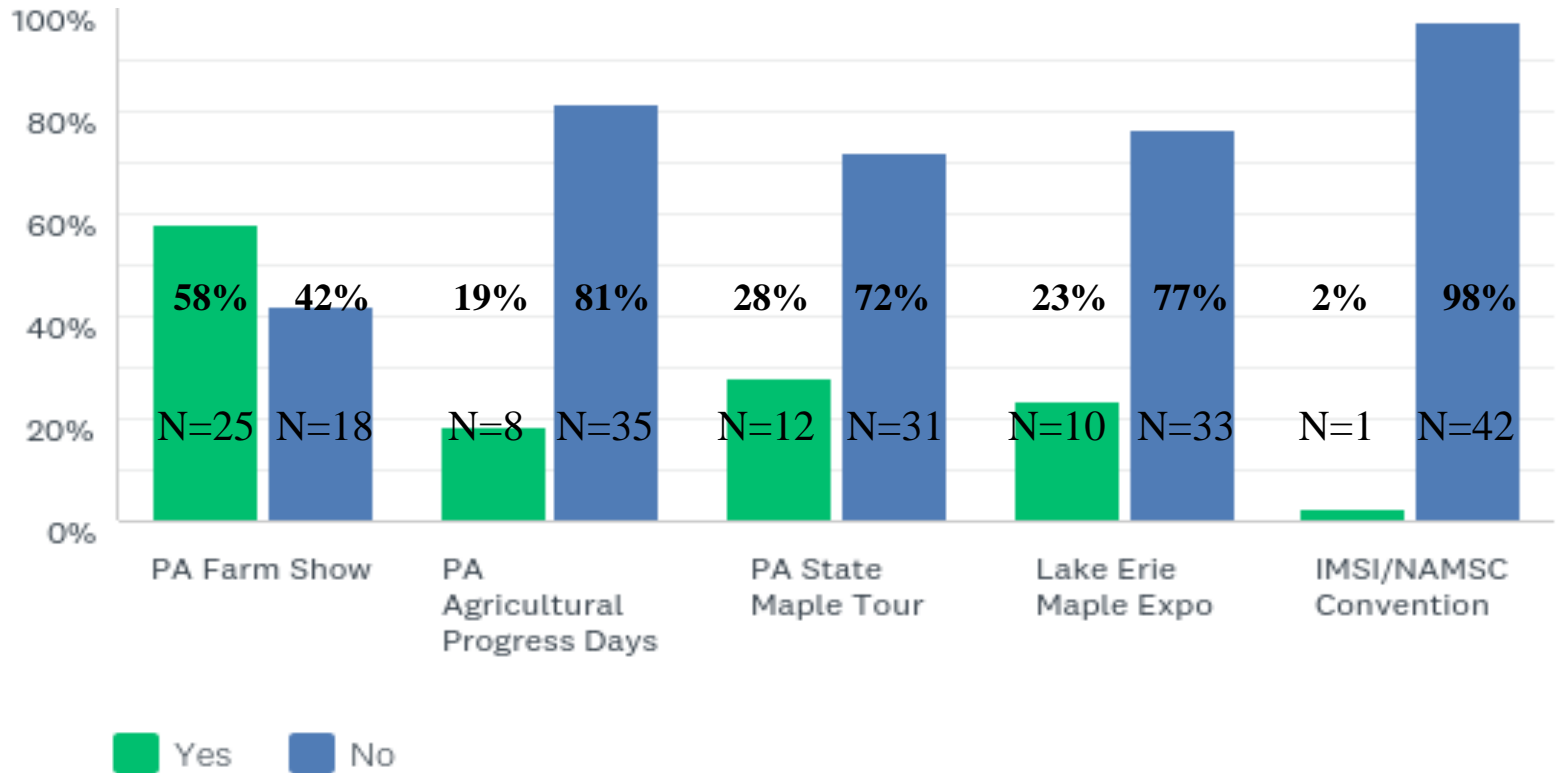
N=43




All responders were associated with a region, except one responder is from Dauphin County

# In the last year, have you attended/participated in any of the following events?

N=43



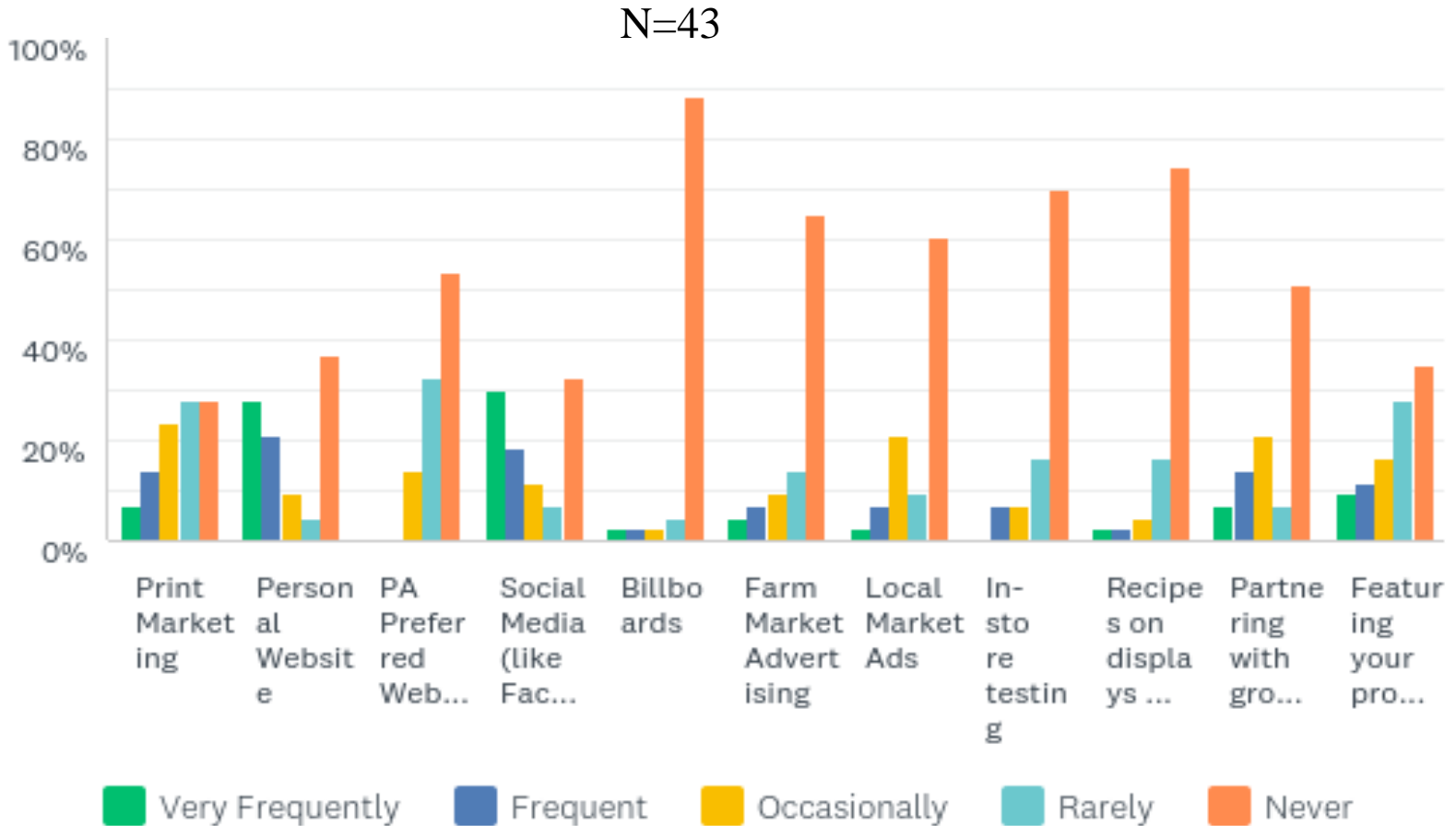


## In the last year, have you attended/participated in any of the following events? Cont'd


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- A little over half of respondents participate in the PA Farm Show.
- Other events are not well attended providing opportunities for learning and marketing PA Maple products to members and attendees.
- Maple Council should make sure members are aware of these events and topics being addressed that would add value to PA maple producers and hobbyists.

# How frequently do you use the below marketing tools to market your maple products to consumers?







## How frequently do you use the below marketing tools to market your maple products to consumers? Cont'd

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- The majority of members rarely or never do any types of marketing tools to market maple products to consumers.
- There are many missed opportunities to promote maple products not being utilized by the association to promote their products to consumers.
- The next slides will provide a better picture of the numbers promoting and not promoting maple products.

## How frequently do you use the below marketing tools to market your maple products to consumers? Cont'd

	Very Frequently	Frequently	Occasionally	Rarely	Never
Print Marketing	3 6.98%	6 13.95%	<b>10</b> <b>23.26%</b>	<b>12</b> <b>27.91%</b>	<b>12</b> <b>27.91%</b>
Personal Website	<b>12</b> <b>27.91%</b>	<b>9</b> <b>20.93%</b>	4 9.30%	<b>2</b> <b>4.65%</b>	<b>16</b> <b>37.21%</b>
PA. Preferred Website	<b>0</b> <b>0.00%</b>	<b>0</b> <b>0.00%</b>	<b>6</b> <b>13.95%</b>	<b>14</b> <b>32.56%</b>	<b>23</b> <b>53.49%</b>
Social Media (FB and Twitter)	<b>13</b> <b>30.23%</b>	<b>8</b> <b>18.60%</b>	<b>5</b> <b>11.63%</b>	3 6.98%	<b>14</b> <b>32.56%</b>
Billboards	<b>1</b> <b>2.33%</b>	<b>1</b> <b>2.33%</b>	<b>1</b> <b>2.33%</b>	<b>2</b> <b>4.65%</b>	<b>38</b> <b>88.37%</b>
Farm Market Advertising	2 4.65%	3 6.98%	4 9.30%	6 13.95%	<b>28</b> <b>65.12%</b>

## How frequently do you use the below marketing tools to market your maple products to consumers? Cont'd

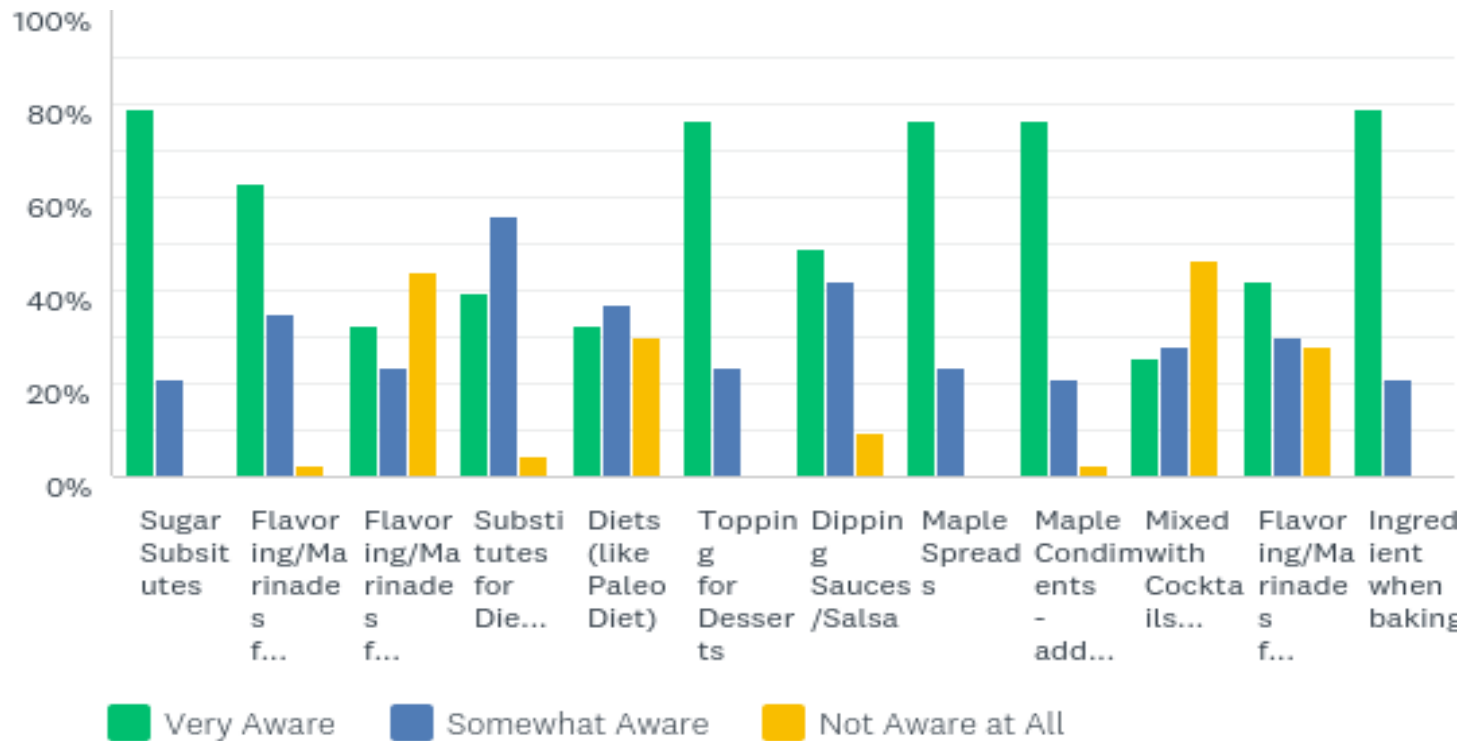
	Very Frequently	Frequently	Occasionally	Rarely	Never
Local Market Ads	1 2.33%	3 6.98%	9 20.93%	<b>4</b> <b>9.30%</b>	<b>26</b> <b>27.47%</b>
In-store testing/tasting	<b>0</b> <b>0.00%</b>	3 6.98%	3 6.98%	<b>7</b> <b>16.28%</b>	<b>30</b> <b>69.77%</b>
Recipes on display in store	1 2.33%	1 2.33%	2 4.65%	<b>7</b> <b>16.28%</b>	<b>32</b> <b>74.42%</b>
Partnering with grocery store for local products	<b>3</b> <b>6.98%</b>	<b>6</b> <b>13.95%</b>	<b>9</b> <b>20.93%</b>	3 6.98%	<b>22</b> <b>51.16%</b>
Featuring your products with other PA local products	<b>4</b> <b>9.30%</b>	<b>5</b> <b>11.63%</b>	7 16.28%	<b>12</b> <b>27.91%</b>	<b>15</b> <b>34.88%</b>

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**O – opportunities being missed for marketing**   **O – being used by a few**

# Consumers use Maple Syrup in a variety of different ways. How aware are you of consumers using Maple Syrup in the following ways?

N=43



Consumers use Maple Syrup in a variety of different ways. How aware are you of consumers using Maple Syrup in the following ways? Cont'd


	Very Aware	Somewhat Aware	Not Aware At All
Sugar Substitutes	<b>34</b> <b>79.07%</b>	9 20.93%	0 0.00%
Flavoring/Marinades for Meats	<b>27</b> <b>62.79%</b>	15 34.88%	1 2.33%
Flavoring/Marinades for Seafood	<b>14</b> <b>32.56%</b>	10 23.26%	<b>19</b> <b>44.19%</b>
Substitutes for Dietary Restrictions	<b>17</b> <b>39.53%</b>	<b>24</b> <b>55.81%</b>	2 4.65%
Diets (like Paleo Diet)	<b>14</b> <b>32.56%</b>	10 23.26%	<b>13</b> <b>30.23%</b>
Topping for Desserts	<b>33</b> <b>76.74%</b>	<b>10</b> <b>23.26%</b>	0 0.00%

Consumers use Maple Syrup in a variety of different ways. How aware are you of consumers using Maple Syrup in the following ways? Cont'd

	Very Aware	Somewhat Aware	Not Aware At All
Dipping Sauces/Salsa	<b>21</b> <b>48.84%</b>	<b>18</b> <b>41.86%</b>	<b>4</b> <b>9.30%</b>
Maple Spreads	<b>33</b> <b>76.74%</b>	<b>10</b> <b>23.26%</b>	<b>0</b> <b>0.00%</b>
Maple Condiments- adding to mustards, BBQ and ketchup, etc	<b>33</b> <b>76.74%</b>	<b>9</b> <b>20.93%</b>	<b>1</b> <b>2.33%</b>
Mixed with Cocktails – Maple Martini, etc	<b>11</b> <b>25.58%</b>	<b>12</b> <b>27.91%</b>	<b>20</b> <b>46.51%</b>
Flavoring/Marinades for produce	<b>18</b> <b>41.86%</b>	<b>13</b> <b>30.23%</b>	<b>12</b> <b>27.91%</b>
Ingredient when baking	<b>34</b> <b>79.09%</b>	<b>9</b> <b>20.94%</b>	<b>0</b> <b>0.00%</b>

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**O** – Indicates opportunity for growth    **O** – Opportunity for partnering and advertising



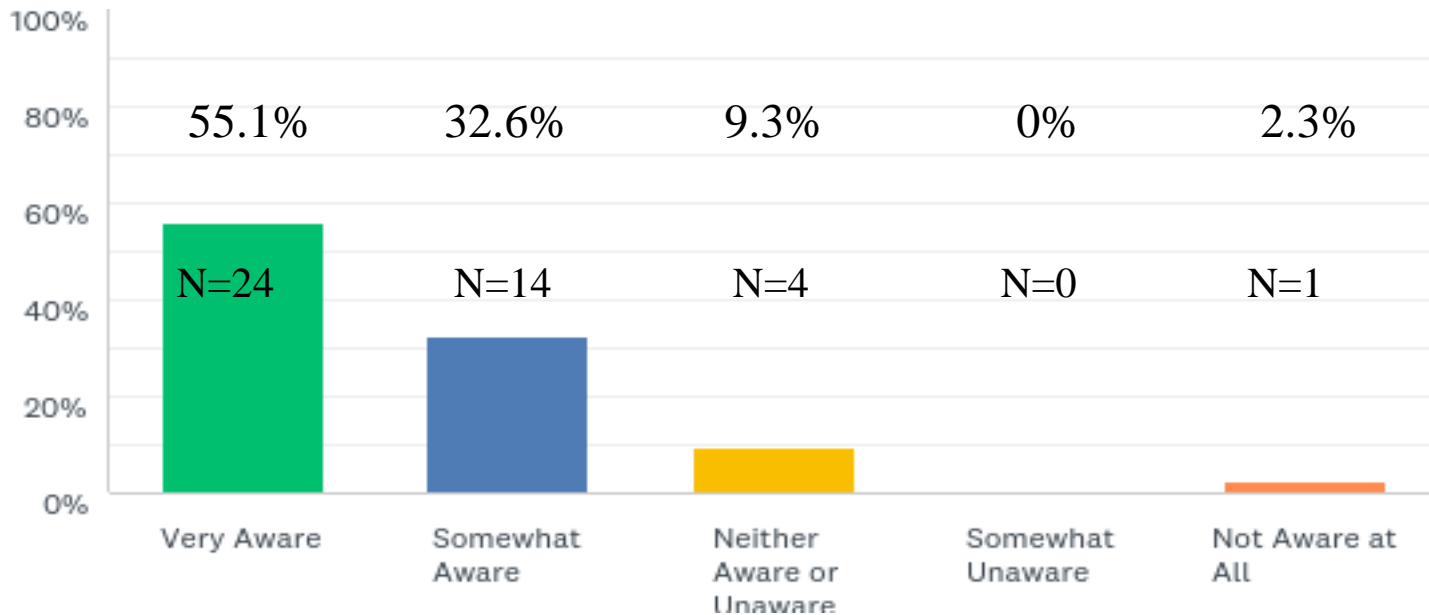
Consumers use Maple Syrup in a variety of different ways. How aware are you of consumers using Maple Syrup in the following ways? Cont'd

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- Data indicates that there is need for education on consumer insights and usage of Maple Syrup by consumers
- Many opportunities to partner with local markets and grocery store for additional product placement and pairing Maple Syrup with product categories. – produce aisle, seafood section, dietary supplements and posting of recipes.

# How aware are you of consumers using Maple Syrup as a value added product?

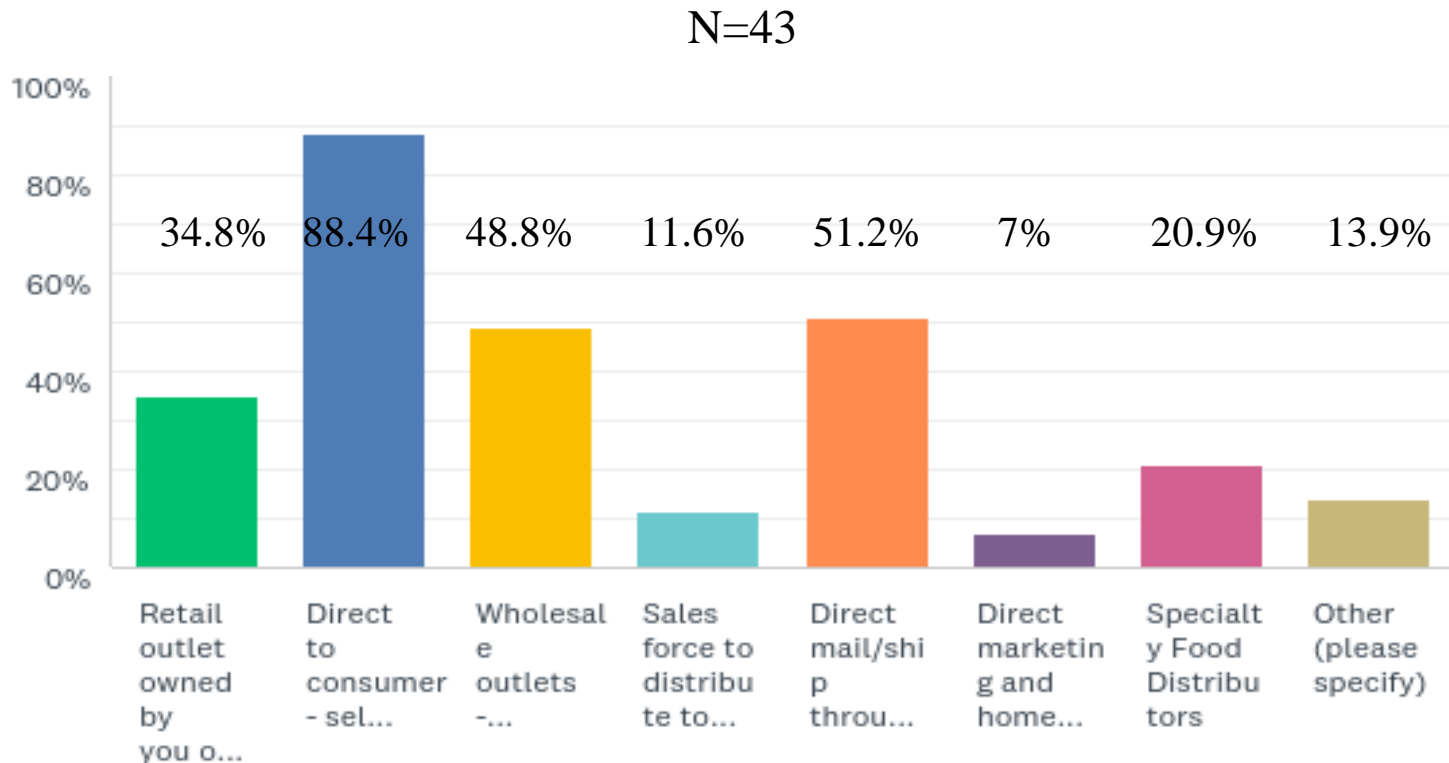
N=43



A little over half of the respondents are very aware of Maple Syrup used as a value added product. Increase awareness among members on how the product is used as a value added would likely increase sales among consumers if promoted as a usage.



# What resources do you utilize to distribute your products?



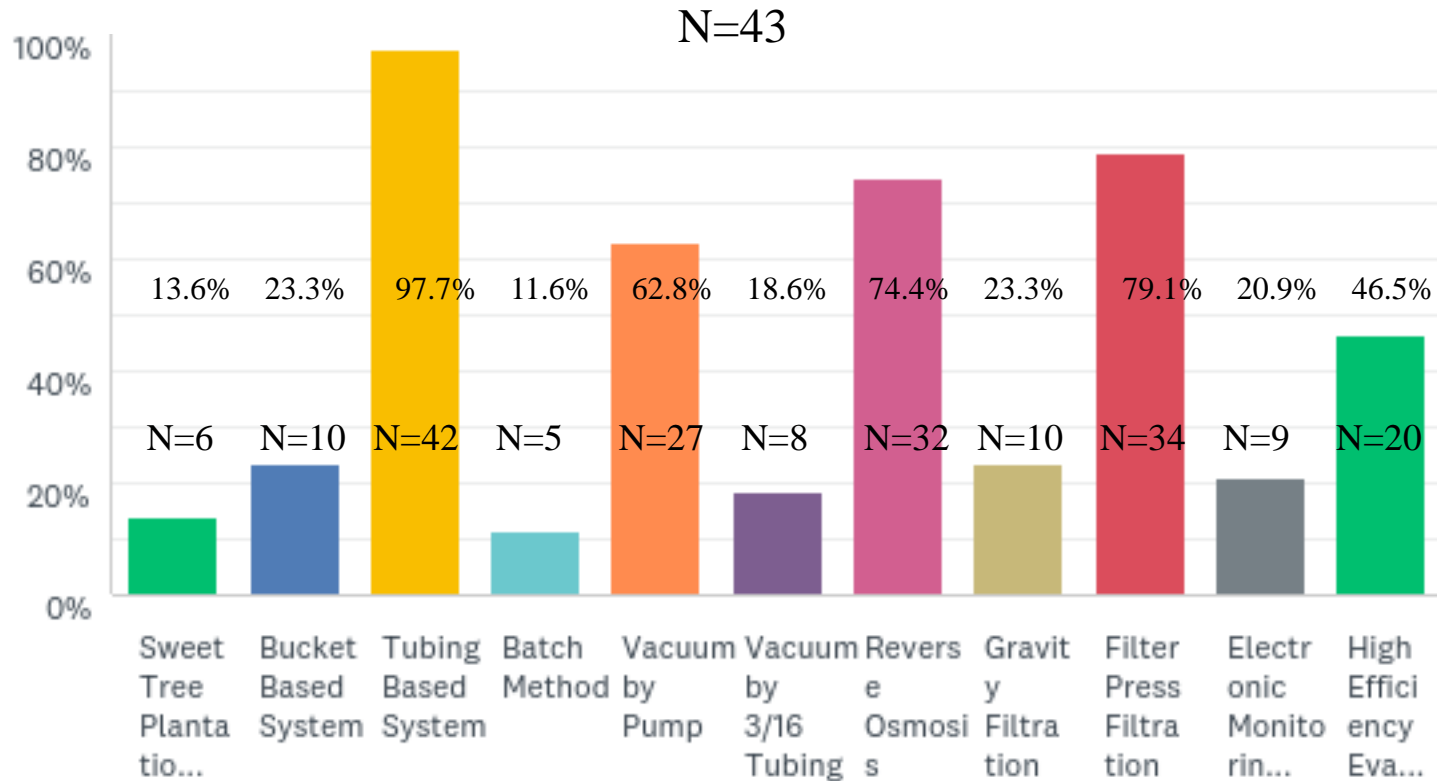
Other specified include wholesale only farmer markets, street fairs, e-mail request, shows and Amazon.com N=6

# What resources do you utilize to distribute your products?

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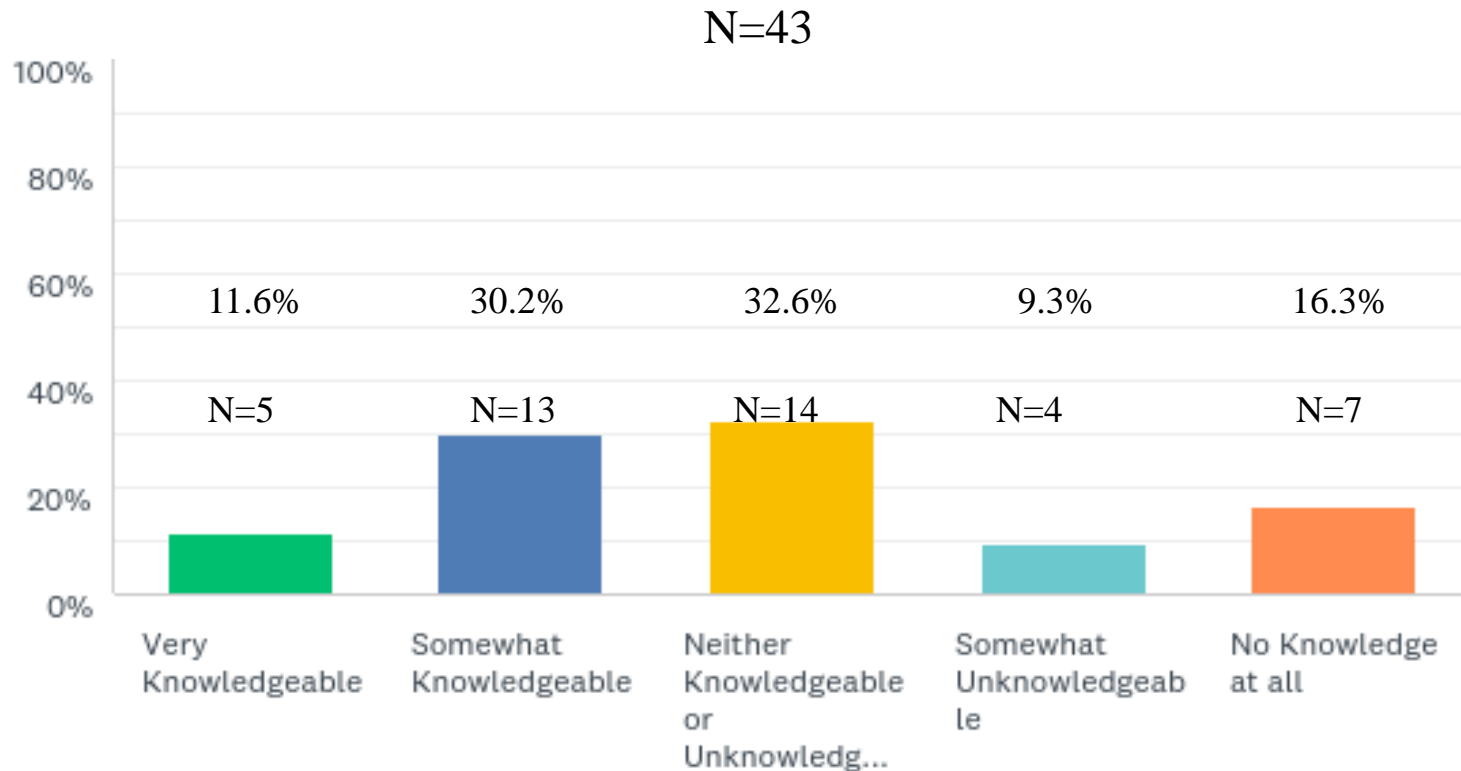
- 88.4% of members distribute their products through direct to consumer – self distribution
- 51.2% direct mail/ship through own catalogs and web sites.
- 34.9% through retail outlets owned by respondent or leased at a store or market
- 48.8% use wholesale outlet or independent distributor or wholesaler
- More product would be distributed and sold if respondents used other outlets like specialty stores, home shopping channels, PA store in PA airports and specialty food web sites.
- If product is available direct sales to local grocery stores and local manufactures for line extension with PA made products.

# What methods do you currently employ in your maple syrup production? (multiple response)



Majority of producers use Tubing Based System for production and least used is Batch Method

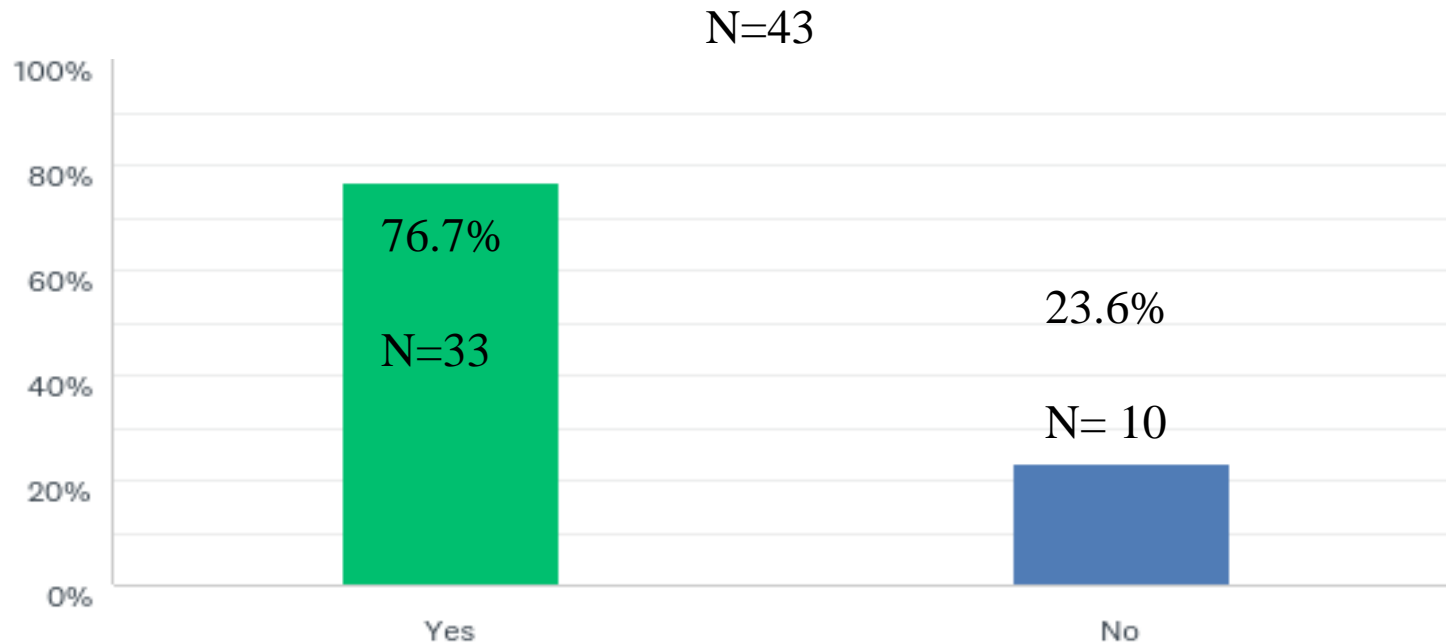
# What is your understanding or knowledge of cooperative versus individual business model?



Only 11.6% of respondents are very knowledgeable cooperative versus individual business model. Great opportunity for educating and training your members on the two business models. Strasser and Associates Fall 2017

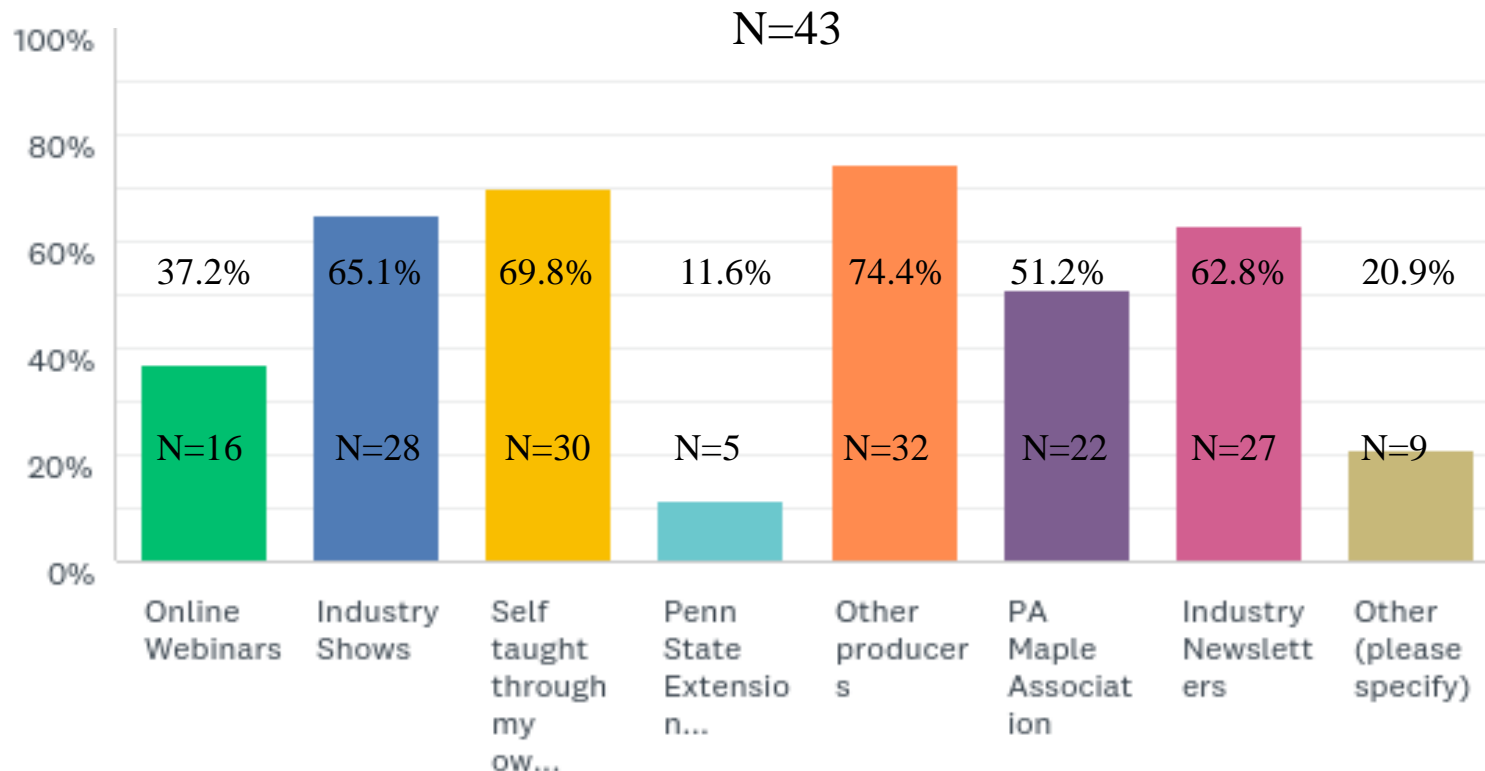
In the next 5 years, do you plan on investing in your maple business by adding new or more efficient technologies?

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The majority of respondents (76.7%) plan to invest in their maple business. This will maintain and build the industry in PA and surrounding states.

# Where do you generally obtain your information to increase your technology regarding the maple syrup industry? (Multiple response)



Majority respondents gain their information either being self taught or other producers. Opportunity to promote education and training through PA Maple Association and Penn State Extension. Educational opportunities can be announced through the Newsletters

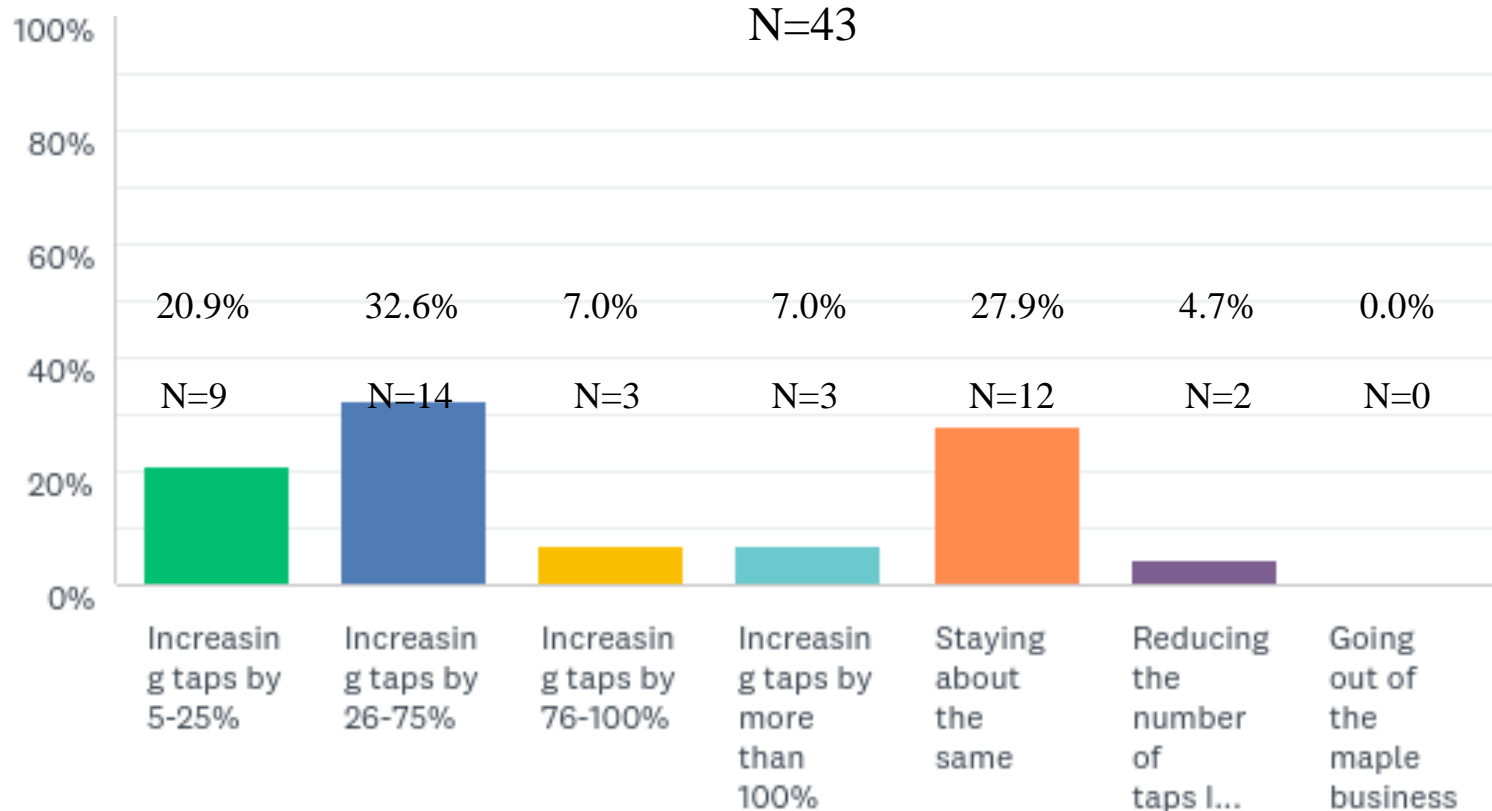
Where do you generally obtain your information to increase your technology regarding the maple syrup industry? (Multiple response)

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Other responses – N=9


- Reduce taxes, and building codes for maple related activities.
- Open public land to maple production
- More support needed from PA Preferred
- For the state to have an overall plan for PA resources: re: maple syrup, hardwoods.
- An ONGOING PR plan so when folks think of PA they think of hardwoods and maple syrup. Just look at NY. NY has a full time PR person for maple.
- have not thought about this much
- I think many PA consumers are not familiar with real maple syrup.

# In the next five years, how do you plan on changing the size of your operation, meaning number of taps?



53% of respondents plan to increase their taps between 5 – 75% from their current number. 28% plan on staying the same size. The industry will see growth in production 29 of the respondents. This would indicate that additional outlets will be required for sales, distribution and product development



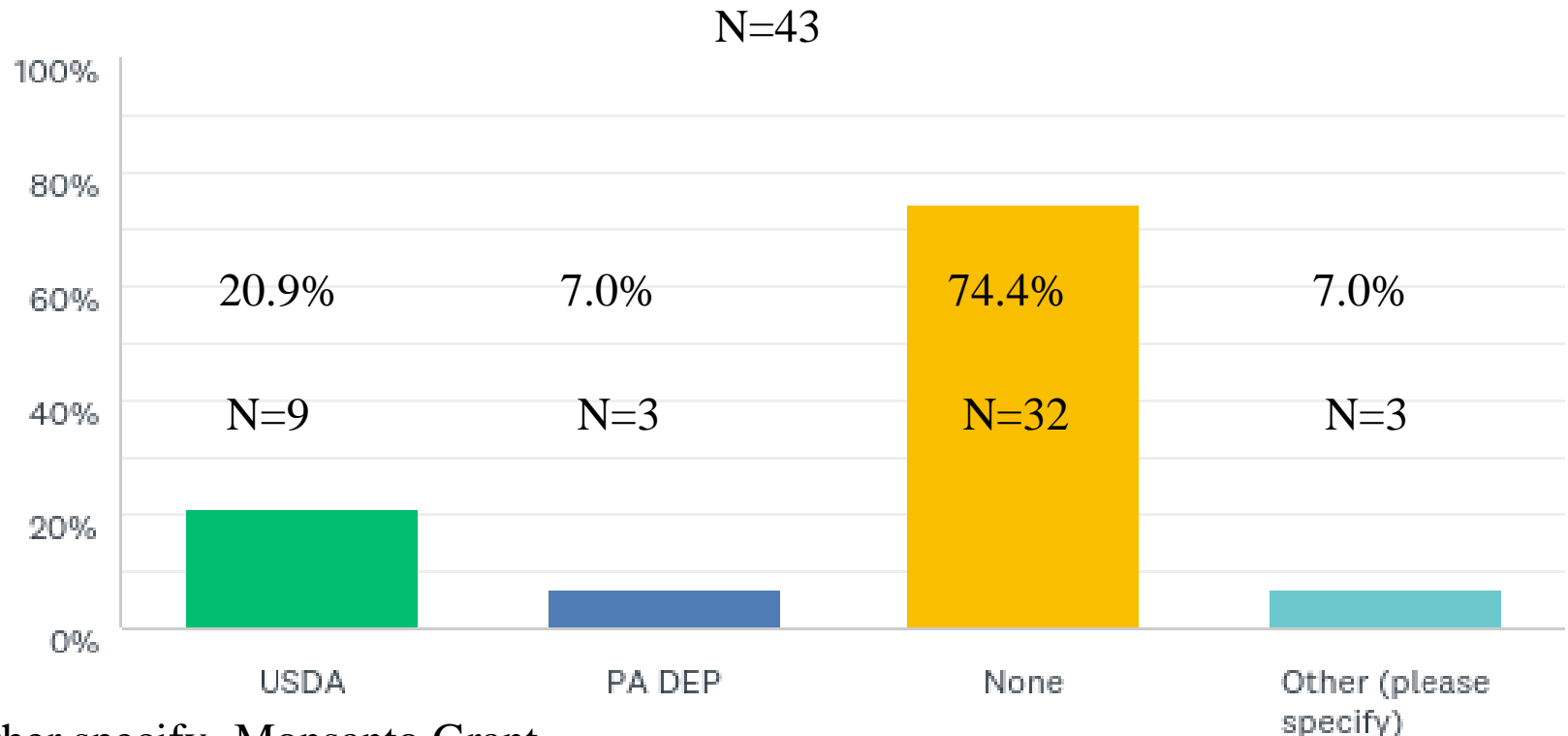


In the next five years, how do you plan on changing the size of your operation, meaning number of taps? Cont'd

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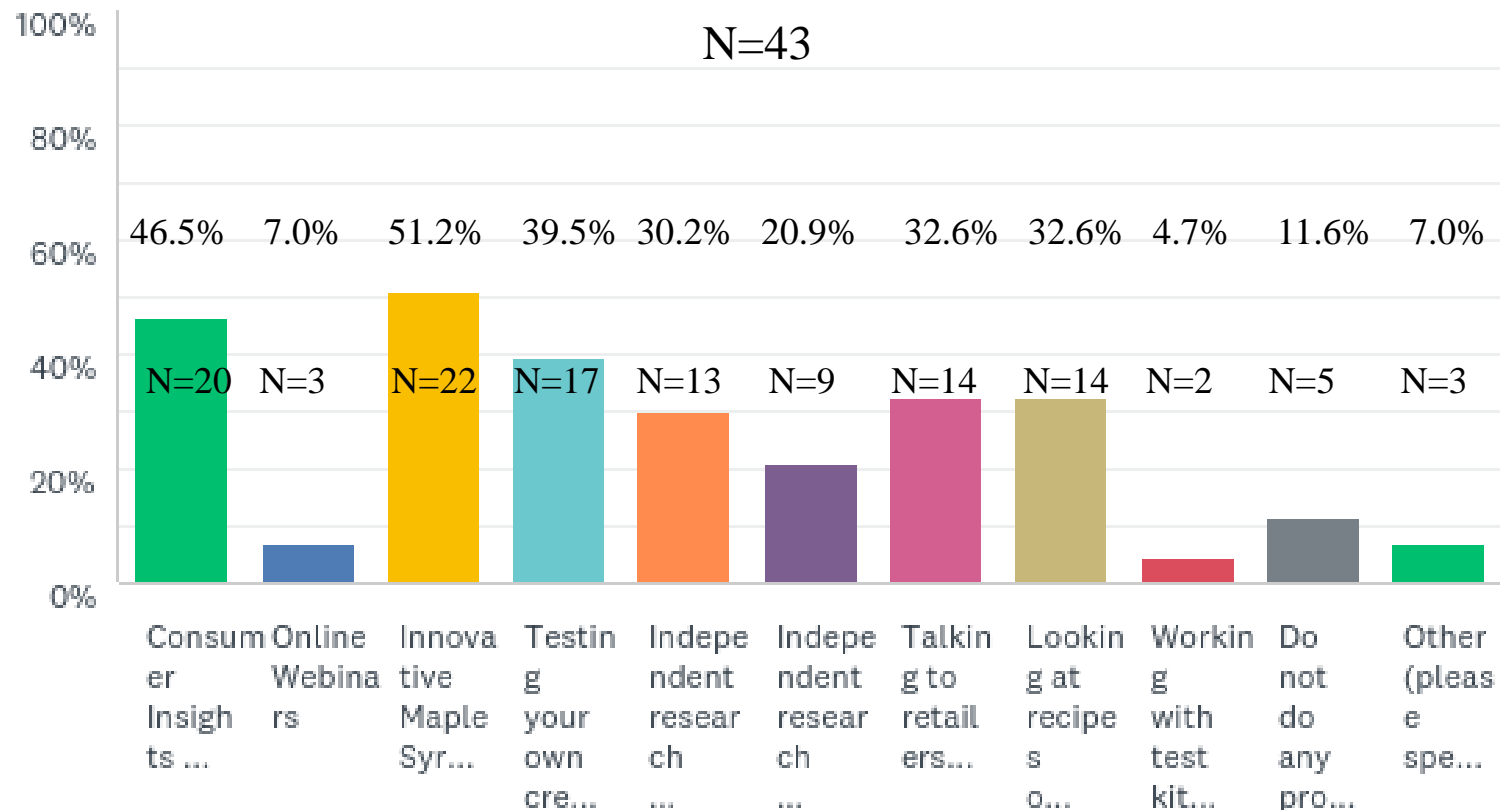
- 53% of respondents plan to increase their taps between 5 – 75% from their current number
- 28% plan on staying the same size.
- The industry will see growth in production from 29 of the respondents.
- This would indicate that additional outlets will be required for sales, distribution and product development

# Which grants have you obtained in the past for your maple syrup operation? (multiple responses)



Majority of respondent do not utilize grant opportunities for maple research, marketing consumer insight, technology development and industry education.

# Where do you obtain your information for product innovation? (multiple responses)



Other responses – Lake Erie Expo, Meeting Speaker and LEME work shop

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# Where do you obtain your information for product innovation? (multiple responses) Cont'd

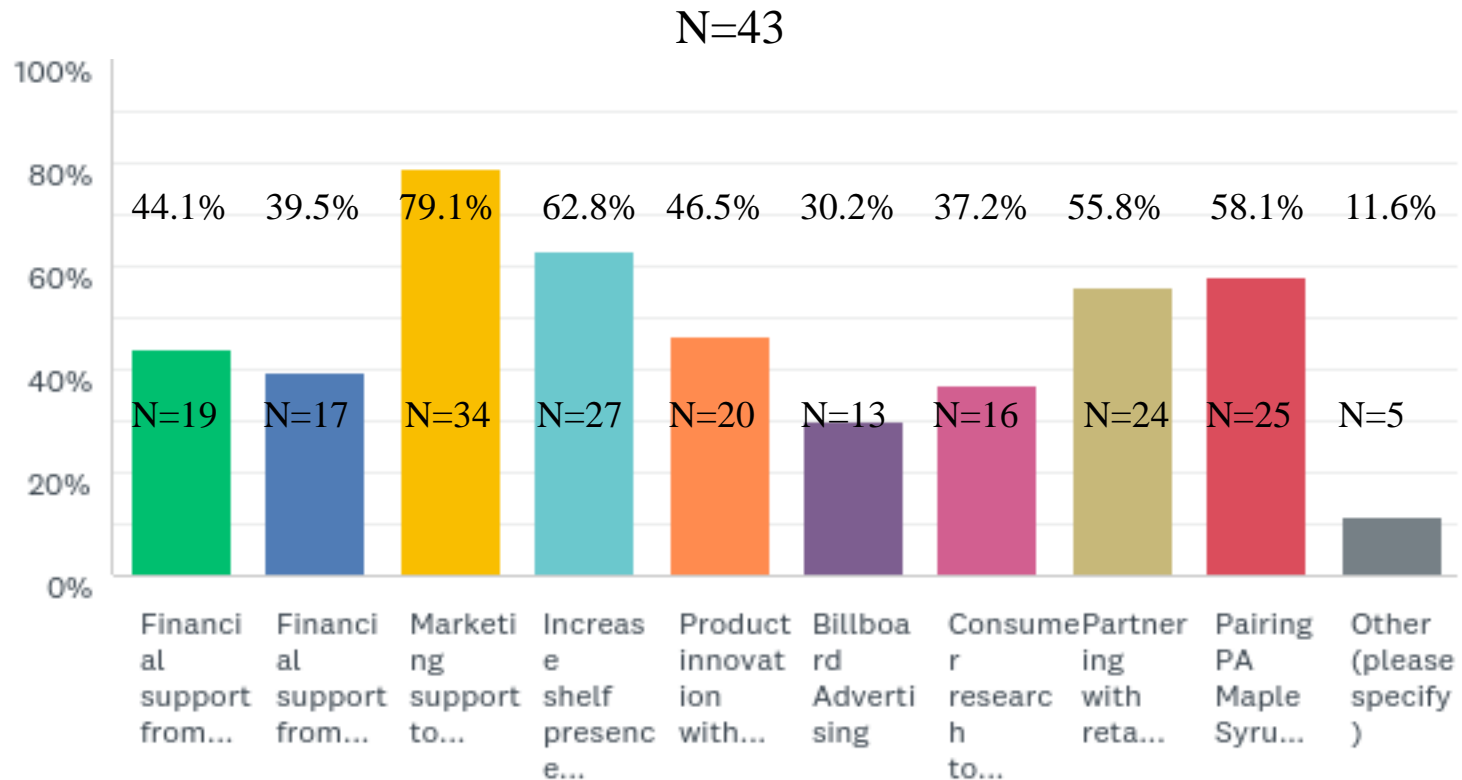
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Majority of respondents obtain information from product innovation from

- Other producers/hobbyists outside PA
- Consumer Insights – informal asking consumers
- Testing own creativity with product innovation

Opportunity for Maple Council to provide more structured information and training on product innovation through consumer research, PA manufacturers and in store testing.

# What resources do you think are needed to grow the Pennsylvania Maple Syrup Industry?



# What resources do you think are needed to grow the Pennsylvania Maple Syrup Industry? Cont'd

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## **Other Responses** - N=5

- For the state have an overall plan for Pa resources: re maple syrup, hardwoods.
- An ongoing PR plan so when folks think of PA they think of hardwoods and maple syrup. NY has a full time PR person for maple
- Reduce taxes and building codes for maple related activities
- Open public land to maple production
- More support needed from PA Preferred
- Think many PA consumers are not familiar with real maple syrup

# What resources do you think are needed to grow the Pennsylvania Maple Syrup Industry? Cont'd

<b>Marketing support to educate consumers to the benefits and usages of Maple Syrup</b>	<b>79.07%</b>
Increase shelf presence with Retail Outlets	62.79%
Pairing PA Maple Syrup in store with product usage – produce, baking, ice cream or sweetener section, etc.	58.14%
Partnering with retailers to include PA Maple Syrup with other local products	55.81%
Product innovation with other PA Manufacturers (like Herr's Hatfield, Giant Eagle)	46.51%
Financial support from PA Department of Agriculture	44.19%
Financial support from the State of Pennsylvania	39.53%
Consumer research to determine trends and insights	37.21%
Billboard Advertising	30.23%

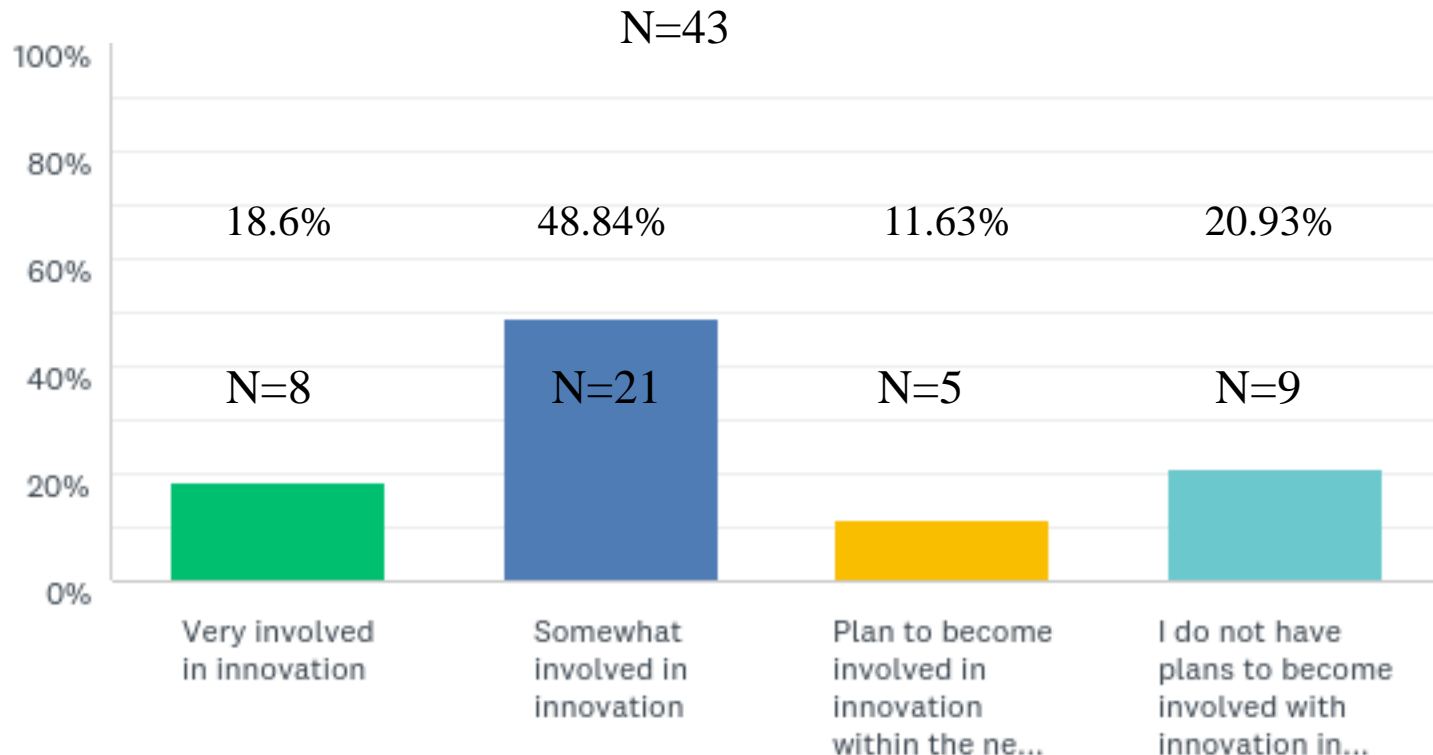
# What resources do you think are needed to grow the Pennsylvania Maple Syrup Industry? Cont'd

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- During the consumer research the top mention is the same that was mentioned in all three focus groups. Consumers are looking for alternative usage for Maple Syrup. Consumers want to support local and look for products for pairing and recipes to use local products.
- Secondly, during store checks retail outlets are currently providing shelf space in multiple sections for local products and pairing. Excellent opportunity to increase usage and awareness of PA maple products.
- PA Retail outlets are currently using NY and VT maple syrup for their private label maple syrup. Missed opportunity

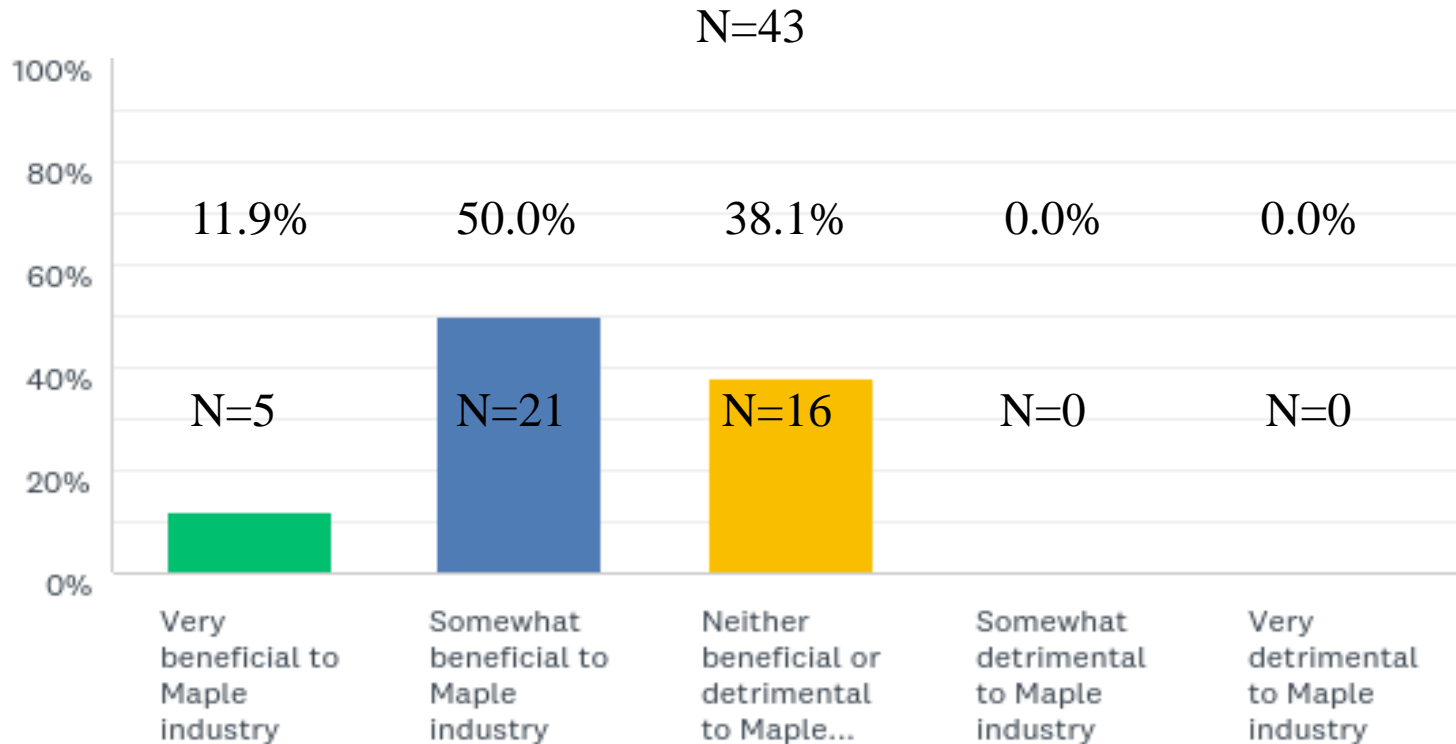


# How involved are you currently in innovation?



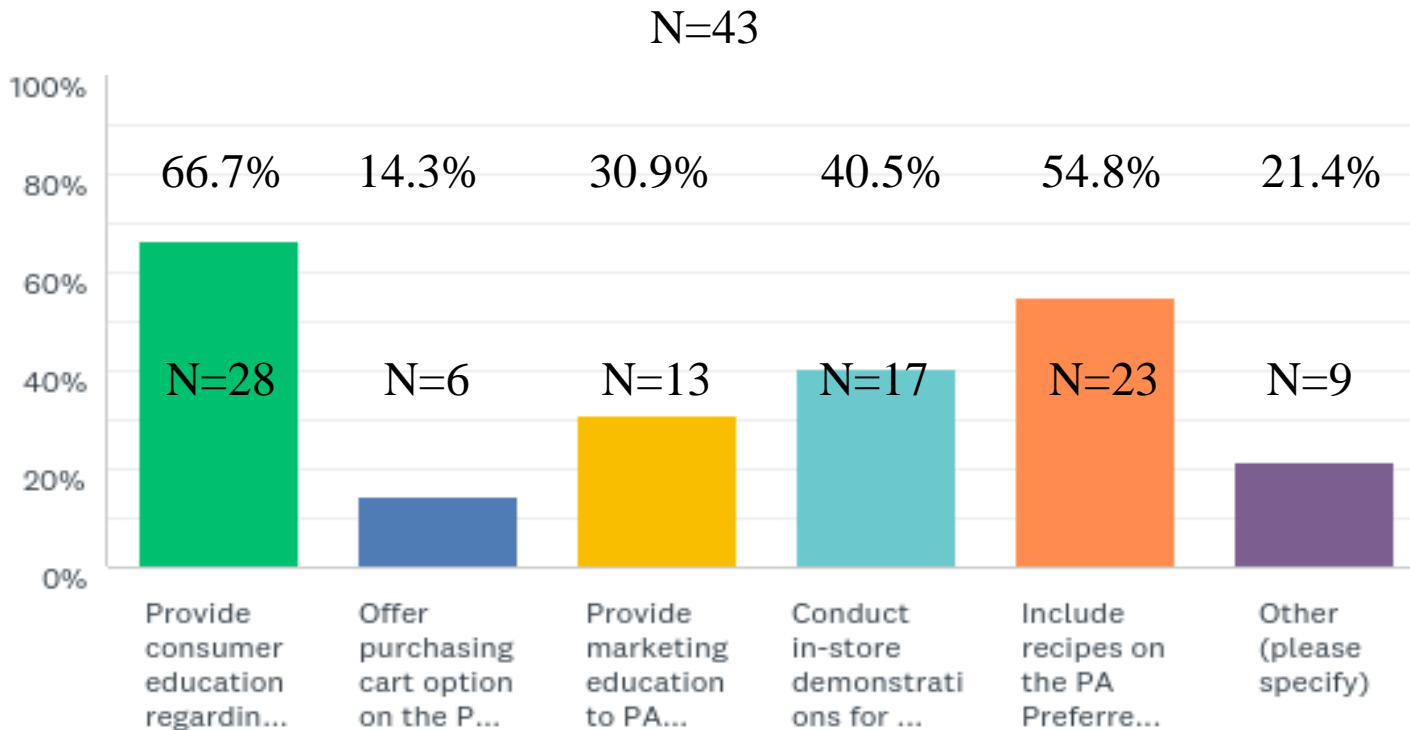
Majority of respondents are somewhat involved, providing a need for Education and grant funding for research and innovation.

# Do you think the PA Preferred Program including the labels, marketing materials and web site is:



Opportunity to partner and build a relationship with PA Preferred for additional funding and support in promoting Maple Syrup to consumers.

# How could the PA Preferred program be improved to benefit the Maple producers?



Consumer education was the PA Preferred focus in 2016, but I believe the focus has switched to the Farmer in 2017. Recommend the Maple Council meet with PA Preferred Program Team to determine focus for 2018.

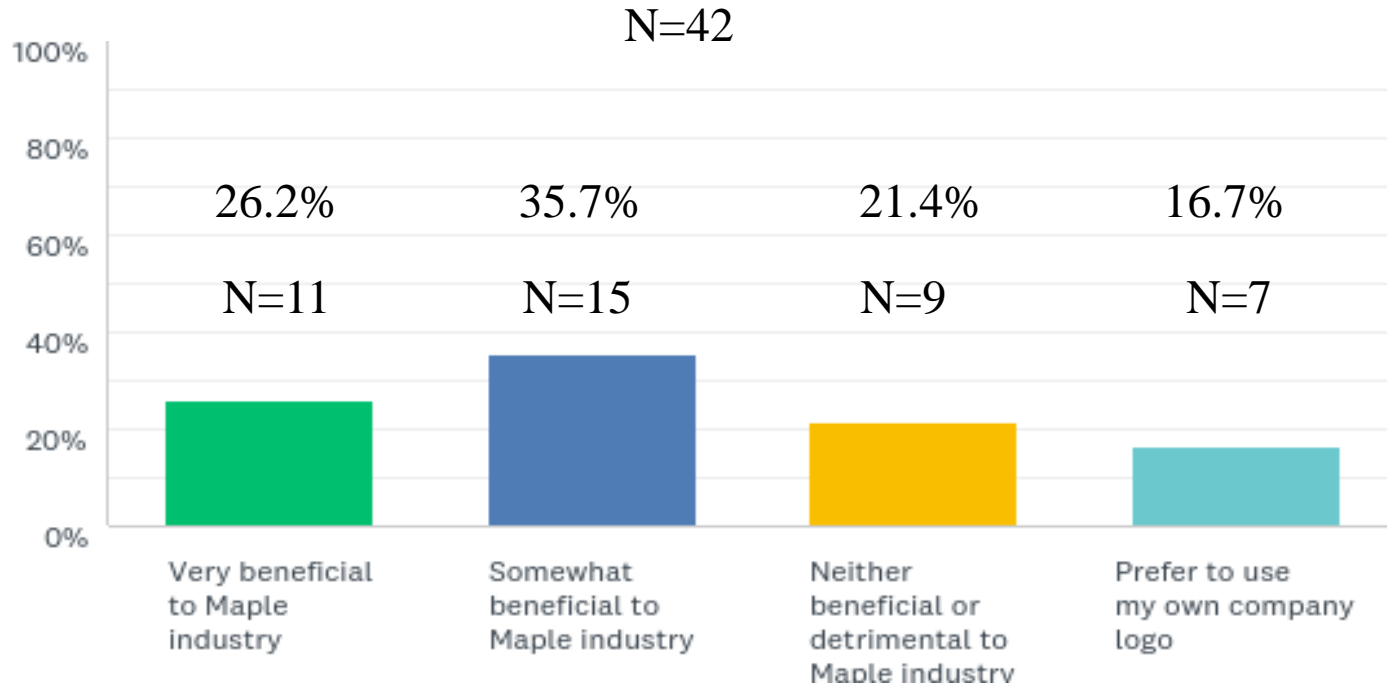
# How could the PA Preferred program be improved to benefit the Maple producers?

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## **Other Responses N=9**

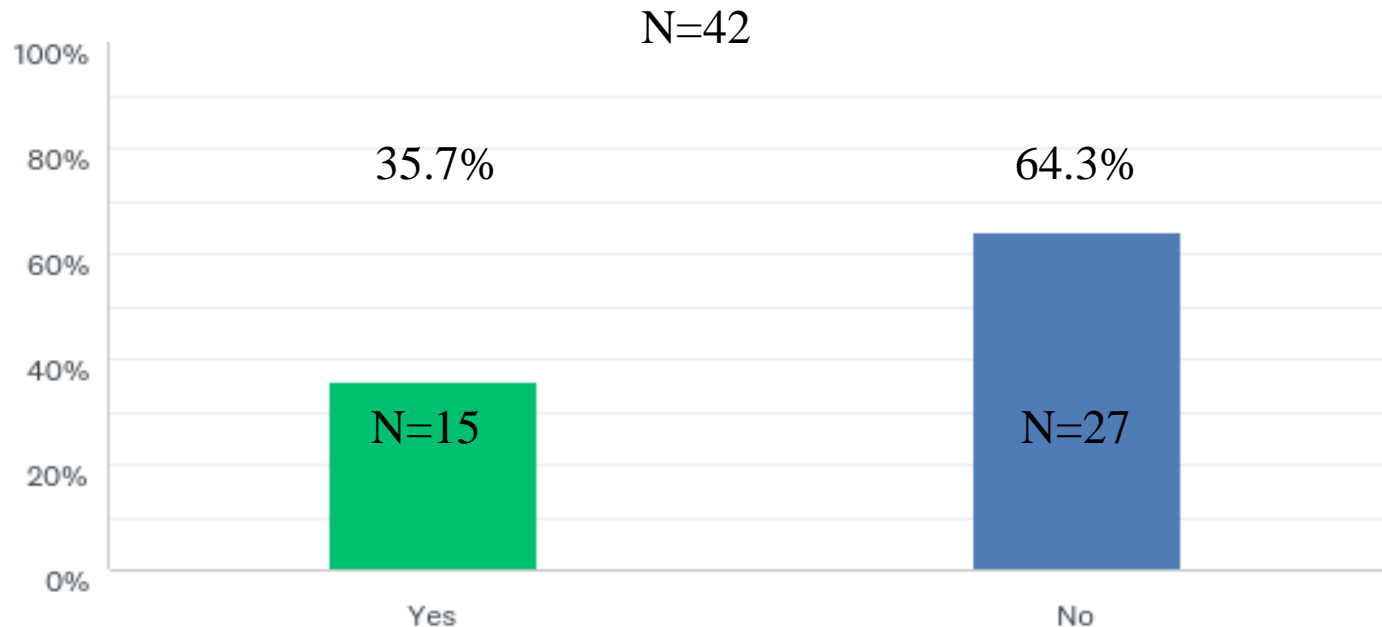
- Maple labels and print material easier to obtain
- Include maple in there publications, etc
- Purchase stickers that stick
- “Pennsylvania” on the label/container is sufficient
- Again a state wide push for awareness of PA hardwoods, maple, etc.
- Create PA preferred labels that do not take up as much space on syrup jug and that complements syrup jugs
- I believe NY had a similar program, I don't think it took off very well

# Would a specific PA Maple logo created to be used by all PA producers be beneficial for your business?



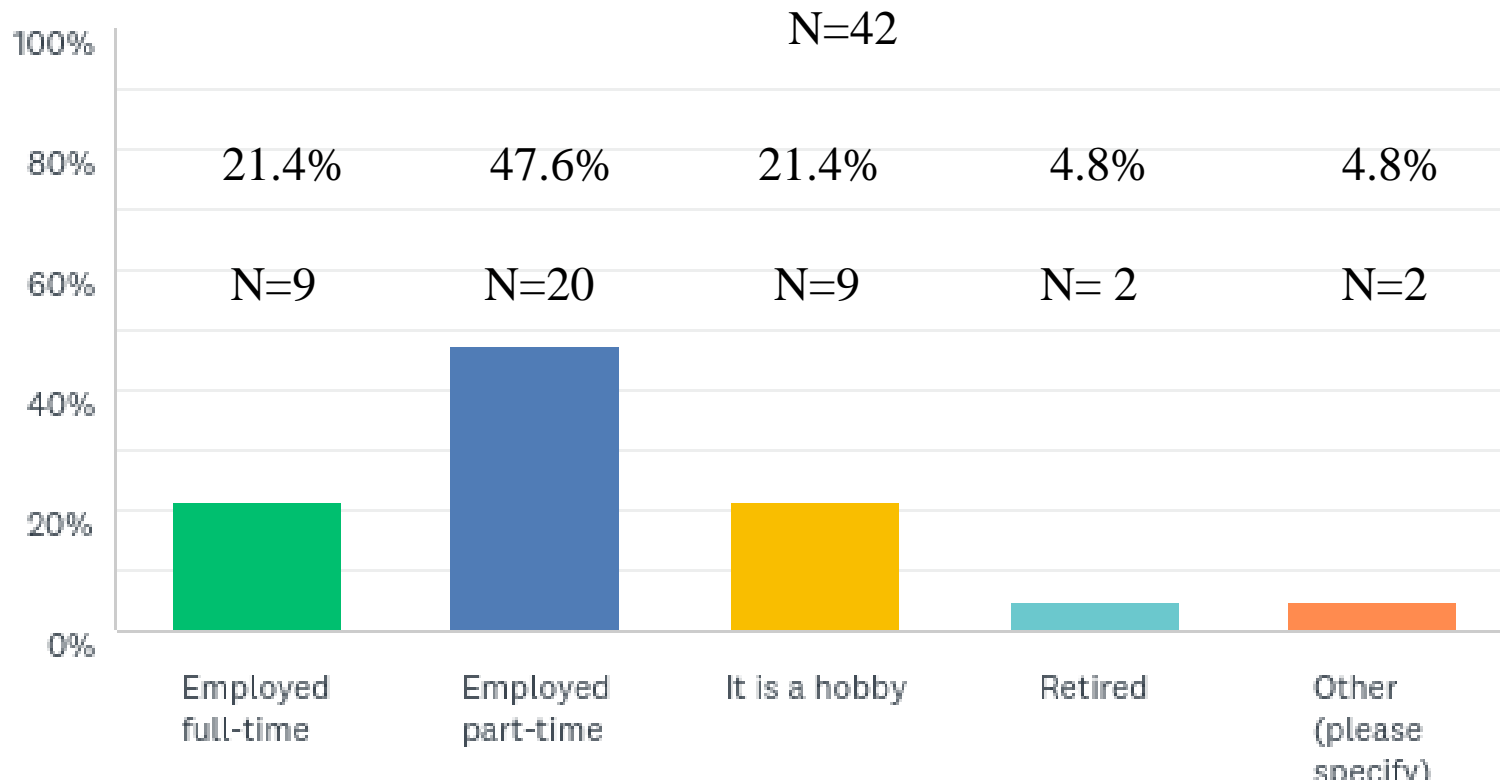
Majority of respondents feel that a specific PA Maple logo would be beneficial. Unless the Maple Council has full support of developing a PA Maple logo then Maple Council should concentrate on other marketing and educational programs to support awareness.

# Do you currently participate in the PA Preferred Program?



64.3% of respondent currently do not participate in the PA Preferred Program. If the Maple Councils wants support and funding to build the PA Maple Industry then Producers/Hobbyist would have to become more active and supportive of the PA Preferred Program.

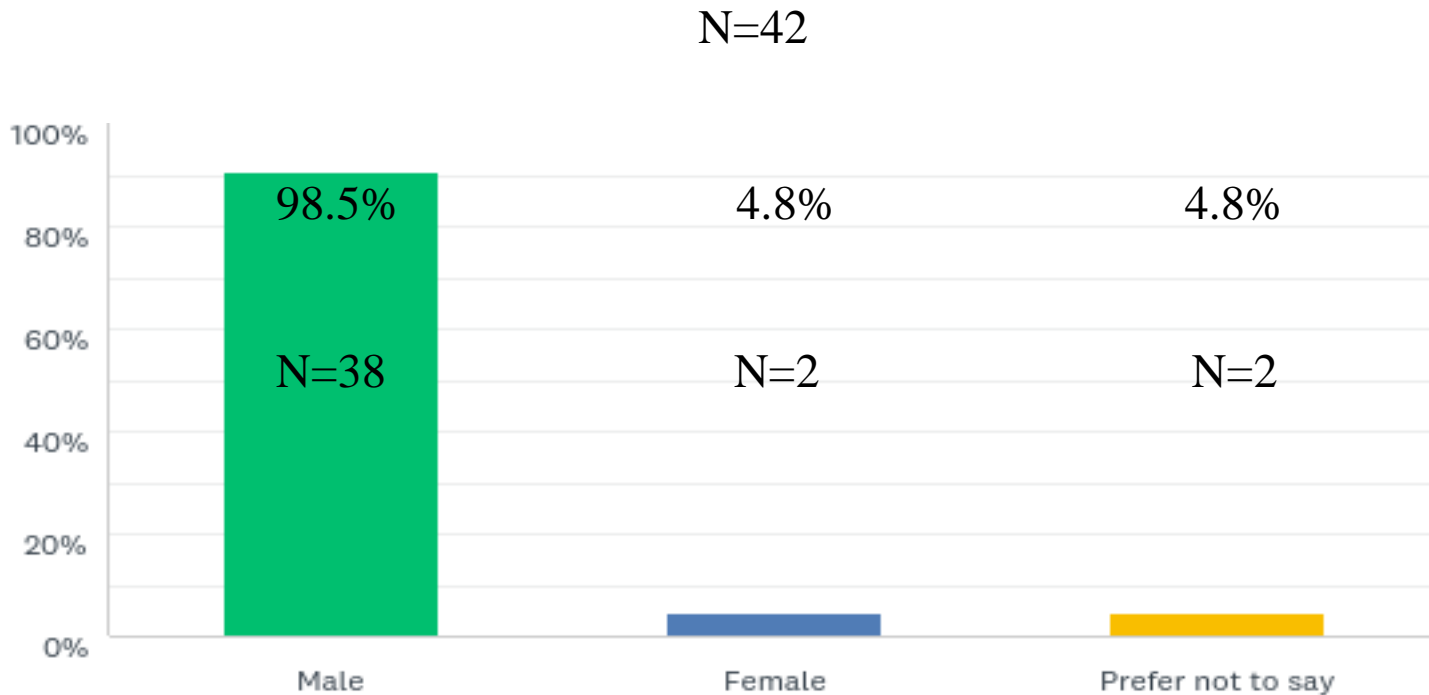
# Which one of the following best describes your current working status making Maple Syrup?



Other responses – Production for Sale, Education and Second job.

Only 9 respondents are employed full time and 20 working part time making Maple Syrup. The results of the survey does not represent the full time employed producers.

# What is your gender?







# Conclusions and Recommendations

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- Maple Council has an abundant of opportunities to promote and position Maple Syrup as PA brand.
- Based on the Qualitative Consumer research; consumers wanted to support PA products and are looking for recipes, product pairing and innovative uses for Maple Syrup.
- Education is one of the keys to promoting Maple Syrup to both your members, retailers and consumers.



# Conclusions and Recommendations

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- Build relationships with PA Dept of Agriculture and PA Preferred Program to utilize the programs and resources available to PA producers.
- Collaborate with PA manufacturers, retailers and distilleries to innovate ideas for Maple flavored products and maple syrup as an ingredient.

# Conclusions and Recommendations

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- Hire a marketing/pr person to negotiate additional shelf space in multiple section of retail outlets.
- Contract a sales person to negotiate with manufactures and private label companies to use PA Maple syrup as an ingredient or product rather than using other state and Canadian maple syrup.
- Partner with a company to conduct in-store tastings and provide recipes to consumers.

# Conclusions and Recommendations

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- Encourage producers/hobbyists to become more engaged in learning opportunities through industry meetings, speaker series and webinars.
- Continue writing grants to continue education and development for members of the Maple Council.

# Maple Syrup Web Survey Questions

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