

Discovering the Tastes for Cider

Landmark Study Underway to Identify What Consumers
Want When Choosing a Craft Cider

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By Ronda Payne



*Photo by Katie Selbee Twin Island Cider
The baldwin apple used to make cider at Twin Island Cider on Pender Island.*

Consumer's interest in craft cideries has exploded over the past five years, and it appears to be a trend that will stick around for years to come.

Recognizing this growing movement, Amy Bowen, research director of consumer insights with Vineland Research and Innovation Centre, assembled a team from the industry to create a cider research and innovation strategy in 2016. This strategy is now being acted on to determine how to better satisfy consumers within the growing cider marketplace.

“You can look back to the first cideries, but in the last two or three years,” she says, there has been more of “a buzz in terms of the industry and the growth in terms of beverage and alcohol sales.”

There has definitely been an increase in the opening of craft cideries, cider production and sales of ciders in recent years.

“That’s part of what started us off, seeing that there’s a lot of buzz in the cider industry, seeing what the research needs were,” Bowen says. “We want to understand the obstacles, the needs and what does success look like in 10 years and what does it take to get there.”

Bowen and her team wanted to see what research was needed for the cider industry to continue on its growth projections and how Vineland could help meet those needs, both to satisfy cidery needs and ultimately consumer demand. This desire is what led to the strategy and from it, two research priority areas came out; a better understanding of the cider consumer through consumer research, and a better understanding of cider apple varieties.

“One thing that we are doing is trying to better understand the cider consumer attitudes, knowledge behaviour and brand recognition,” Bowen says. “We have done a brand recognition study across the country. We are going to see if there are differing profiles per region.”

According to Agriculture and Agri-Food Canada, ciders represented national retail sales of \$90 million in 2006 and were estimated at more than \$226 million in 2016. Vineland notes it’s the fastest growing beverage sales category at the Ontario Liquor Control Board. This means there’s room for mass-market and craft styles, just like in the beer market.

Bowen adds that while Vineland is located in Ontario, there is definitely room for national collaboration as the issues are consistent across the country, such as competing with imports as well as with other domestic products. The research needs are similar no matter where in the country a cidery is located.

To capitalize on what consumers want, Bowen's team used Vineland's sensory panel to develop 22 sensory attributes of ciders to describe taste, aroma, flavour, 'mouthfeel' and colour to help understand flavour profiles.

Consumer preference tastings were conducted on 15 ciders in 2017. This profiling showed that the majority of consumers prefer sweet ciders with taste descriptors like tropical fruit and candy-apple, though it is unknown if this preference applies outside of the Ontario-based taste-test group.

"It's understanding what consumers like," she says. "Define who the cider customer is, the taste profile that they like. It's a benchmarking study in a sense. We're seeing what's already out there and seeing what the opportunity is."

Part of that consumer profiling includes understanding the apples that lead to certain flavour profiles. Bowen and her team have planted a cider orchard to look at apple varieties that will be profitable and feasible with Canadian growers.

"Consumers are not aware of what apples go in to cider," she explains. "I think on the apple side there's a huge opportunity because the consumers don't know the varieties by name."

This is a different situation than that of wines where consumers ask for specific varietals or blends by name.

"They are pigeonholed in the wine industry because [consumers] ask for it by name," she says. "We just don't know if they [specific apples] grow well in our climate. One thing right now we know... a lot of the apples that go into cider are more from the juice market or more from seconds. We are also competing against international players that are making cider not from juice."

Bowen adds that it's the international and domestic mass-market ciders that are typically made from juice. Craft ciders are generally made from fresh-pressed local apples. She wants to ensure that as the growth of the industry takes off, the tree plantings are able to keep pace to meet the need for fresh apples.

“We’re not going to have enough apples for what we need [if the growth continues and new planting isn’t done],” she notes. “There’s going to be a limitation to growth if we don’t factor in the cost structure. A grower can’t plant an orchard if they can’t make money off it and a cider maker can’t make money if the margins are too thin.”

Instead of focusing on specific varieties of apples, Bowen is working towards growing apples and apple mixes that hit on the flavour profiles consumers are most interested in and most likely to purchase. Because the consumer doesn’t know to ask for a certain apple or mix of apples in their ciders, it leaves the opportunity open to cideries to establish blends that fit the taste demand.

“We’ll need to understand what are the needs, not only of the cider market, but also the fresh market and the juice market,” she explains. “I think there’s still a lot of work to be done to figure that out. That’s why we need to understand the consumer to do research. To identify what the best varieties are.”

The orchard will be first evaluated this year, in its first full season of growth. The trees were planted in 2016 with a hope for a full fruit harvest in 2019.

“Once we have trees that are producing, we can understand their roles in how they align with taste profiles and flavour profiles that consumers are looking for,” Bowen says, adding there is the additional aspect of “How do consumer tastes change over time?”

Once the fruit is available from the orchard, the apples will be processed, fermented and evaluated. Understanding both the consumer and the apples will allow for additional opportunities for more premium and differentiated cider products.

“I’d say we won’t have any information [from the orchard apples] until 2020,” says Bowen. “We want to look at the physical, chemical properties of it and look at the flavour profile as well. And also figuring out what trees go well. We could be looking at these varieties and determining what grows well [in different parts of the country].”

The team of Vineland, the Ontario Craft Cider Association, Ontario Apple Growers, packers, growers, researchers and cider makers have all come together on the research to benefit more than just Ontario's cider market, but that of the entire country. In addition to wanting to understand how consumer tastes change, the group wants to explore how consumers move through categories like wine and craft beer to see how the growth and evolution of the cider industry may develop.

"I think that's one of the ways to success, is having everyone work together," she says. "To see what's possible and what's feasible."

Bowen sees the research as having great ripple effects that will bring in partners – like those from B.C. – sooner rather than later to create a national view of the cider industry, consumers and challenges now and into the future. If there's one thing that's certain, it's that cider is here to stay and consumers want more of it.

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