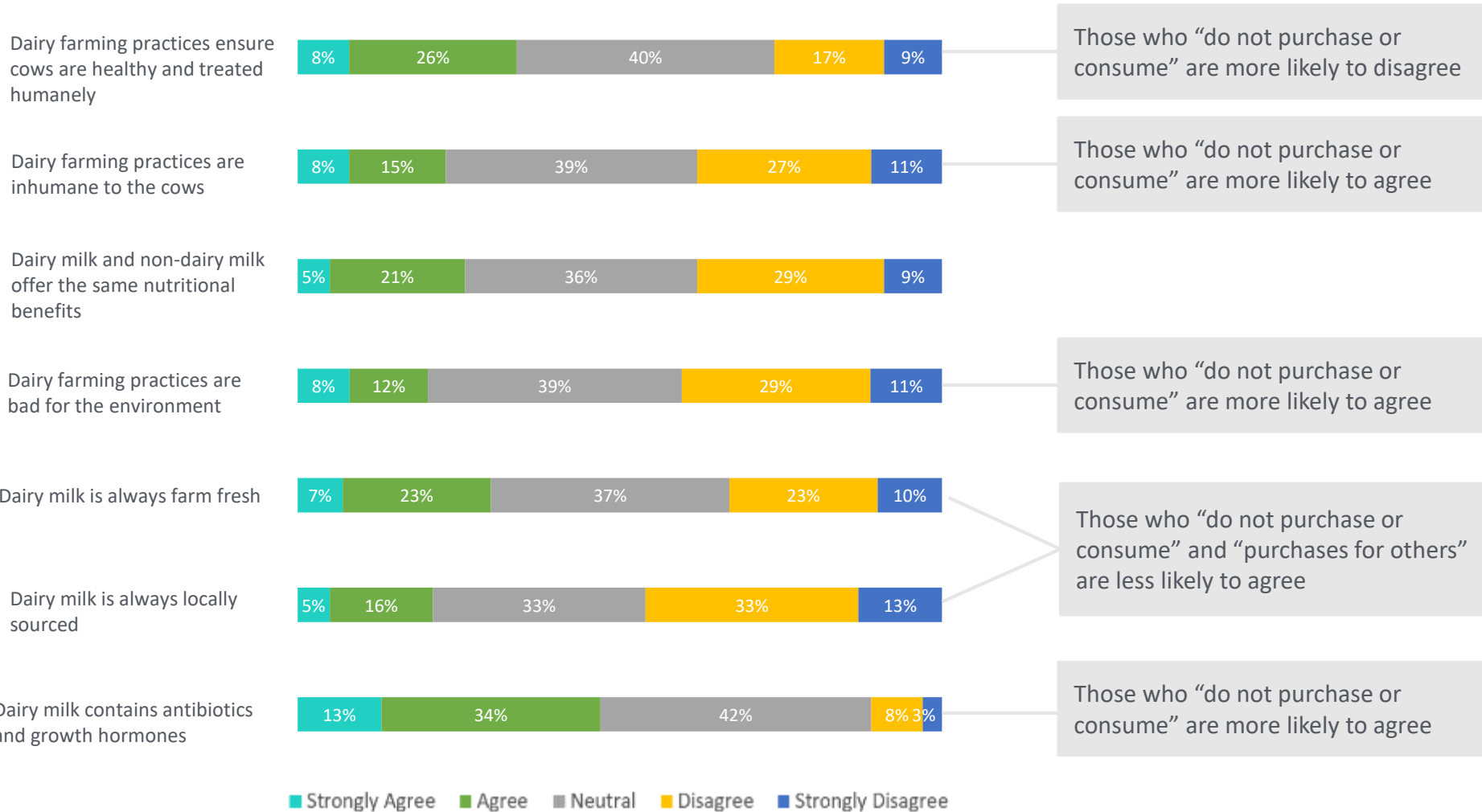


# RESPONDENTS ARE CONFUSED ABOUT WHERE THEIR MILK COMES FROM AND THE ETHICS OF DAIRY FARMING



Those who “do not purchase or consume” are more likely to disagree

Those who “do not purchase or consume” are more likely to agree

Those who “do not purchase or consume” are more likely to agree

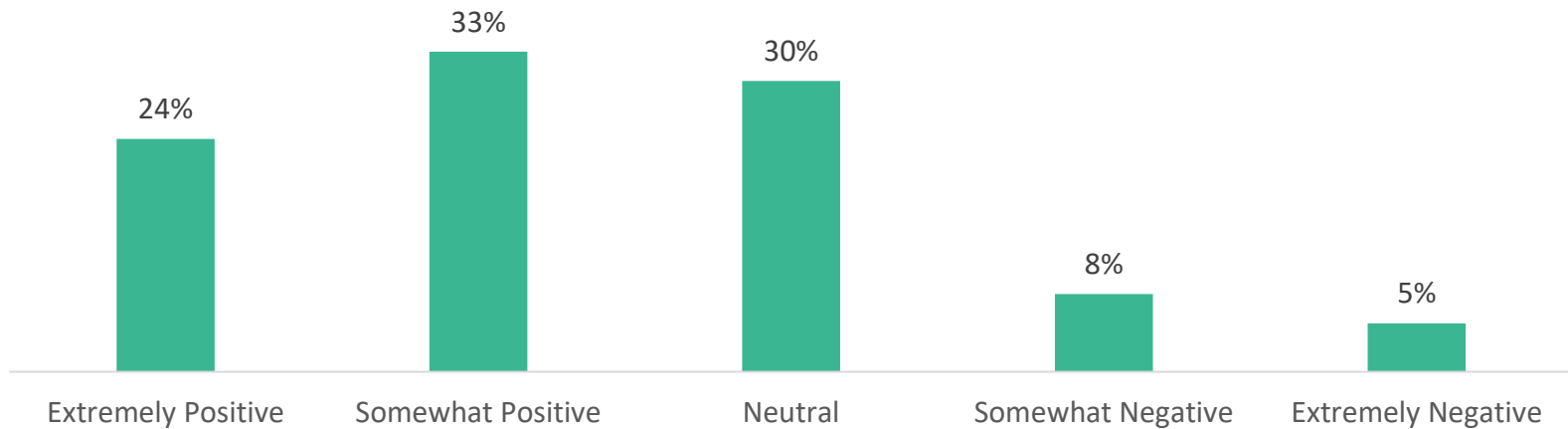
Those who “do not purchase or consume” and “purchases for others” are less likely to agree

Those who “do not purchase or consume” are more likely to agree

QA6. To what extent do you agree or disagree with each of the following statements?

# NON-DAIRY ALTERNATIVES ARE A NATURAL REPLACEMENT FOR DAIRY MILK, AND PERCEPTIONS OF NON-DAIRY MILK ARE MORE CERTAIN

Overall Perception of Non-Dairy Milk



QA3. How would you describe your overall perception of non-dairy milk (e.g., soy milk, almond milk, coconut milk, etc.)?

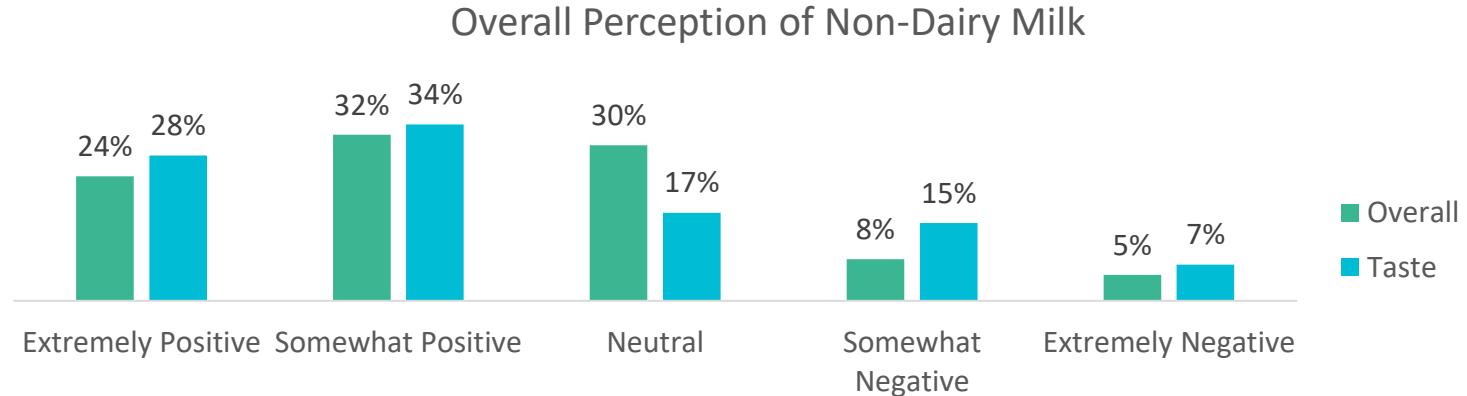
*"I think non-dairy milk is a great alternative to dairy milk, as it's just as versatile, has a longer shelf life, plus especially in the case of nut-based milks, has added health benefits. I think they're healthier in general, and I prefer the fact that no cows were mistreated to provide any of these alternative milk choices." – Does not consume or purchase*

*"They seem like a healthier option for some reason. Maybe commercials and packaging of these milks have led me to these beliefs. These types of milks are always packaged much prettier and appealing to the eye than regular dairy milk." – Purchases & Consumes*

*"I love the taste and health benefits. The only thing preventing me from being extremely positive about them is the price." – Purchases for Others*

# ABOUT 23% OF RESPONDENTS MENTIONED TASTE AS A DRIVER OF THEIR OVERALL PERCEPTION OF NON-DAIRY MILK

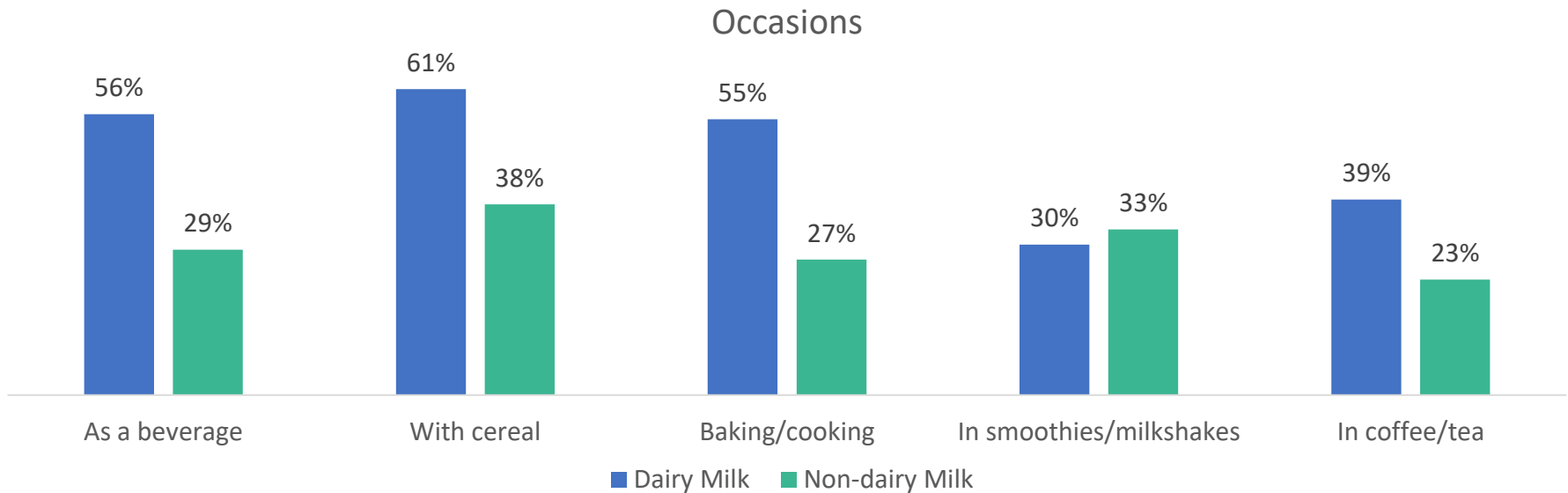
- 127 respondents (23%) mention taste in the open-end about their overall perception of **non-dairy milk**
  - *67 respondents mention taste as a positive driver*
  - *46 respondents mention taste as a negative driver*
  - *14 respondents mention taste in a neutral sense*
- Those who mentioned taste tend to be less neutral in their overall perception of non-dairy milk



QA3. How would you describe your overall perception of non-dairy milk (e.g., soy milk, almond milk, coconut milk, etc.)?

# THE MOST COMMON OCCASIONS FOR DAIRY MILK ARE AS A BEVERAGE, WITH CEREAL, OR FOR BAKING

- The most common occasions for **non-dairy** alternatives are with cereal and in smoothies/milkshakes



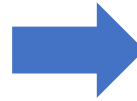
QH1. For what occasions do you or other members of your household consume each of the following types of milk?

# CONCLUSIONS

## FINDINGS

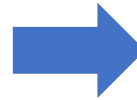
## IMPLICATIONS

1 Much of the negative stigma surrounding dairy comes from a place of confusion – many consumers are confused as to what to think about dairy



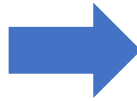
Make the facts about dairy, both positive and negative, more transparent to consumers. Respondents often hear conflicting facts and opinions from different sources (e.g., media, friends, family, doctors) so provide a consistent message

2 Many consumers don't know where their dairy milk comes from – they don't know how fresh their milk is or from where it was sourced



Most consumers would be pleasantly surprised to learn where and how their dairy milk was sourced. Make information about the origin of the milk more easily accessible – including date of production and information about the dairy farm (e.g., location, background, history)

3 Many consumers are conflicted and confused about the ethics behind dairy farming (e.g., treatment of animals, environmental concerns). However, most consumers who have actually visited a dairy farm had a positive experience



Help facilitate educational experiences at dairy farms in order to ease concerns surrounding dairy farming ethics. Inform consumers about the origin of their dairy milk and cultivate relationships between consumers and the farms

4 Many consumers think non-dairy milk alternatives have comparable nutritional benefits without the worry of hormones and antibiotics. Many predict their consumption of non-dairy milk will increase over the course of the next year



Educate consumers about where nutritional benefits of dairy and non-dairy milk *differ* and focus on how dairy milk can be more favorable (e.g., more protein, naturally occurring calcium, no added sugar); particularly, highlight lower prices and nutritional benefits