



Consumer Perceptions Dairy and Plant-Based Milk Alternatives

October 24, 2018

Background & Objectives



- Plant-Based Milk Alternatives have grown in number and volume over the years. They share the refrigerated section of food stores with Dairy Milk and compete for share of throat/stomach.
- DMI would like to better understand consumer perceptions toward Dairy Milk and Plant-Based Milk Alternatives, particularly regarding nutritional content.
- The learnings from this study will be used to inform DMI across departments and industry partners.

Methodology



Design

- Study conducted by IPSOS, a global market research and consulting firm
- Online data collection
- 12 minute interview
- Interviews conducted Aug 10-14, 2018



Sample

- N=2010 Gen Pop (Adults 18+)
- N= 914 Exclusive dairy milk buyers (once a year or more often)
- N=789 Dual buyers of dairy milk and plant-based milks (once a year or more often)
- N=110 Exclusive plant-based milk buyers (once a year or more often)



Areas of Questioning

- Respondents were asked about their perceptions of milk and milk alternative products via both open-ended and closed-ended questions.



Summary Of Findings

Key Takeaways

Health is interconnected with nutrition in consumers' eyes. Dairy milk and plant-based milk alternatives are purchased with nutrition in mind yet many consumers are not aware of nutritional distinctions between products.

- Consumers have an expectation that products labeled as “milk”, whether or not they are dairy milk, are comparable on nutrition content. This belief is stronger among plant-based milk alternative buyers.
- Almond milk, soy milk and coconut milk are perceived as having the same or more vitamins, protein or other key nutrients as compared to milk
- The majority of adults believe that dairy milk and plant-based milk alternatives have the same nutritional content

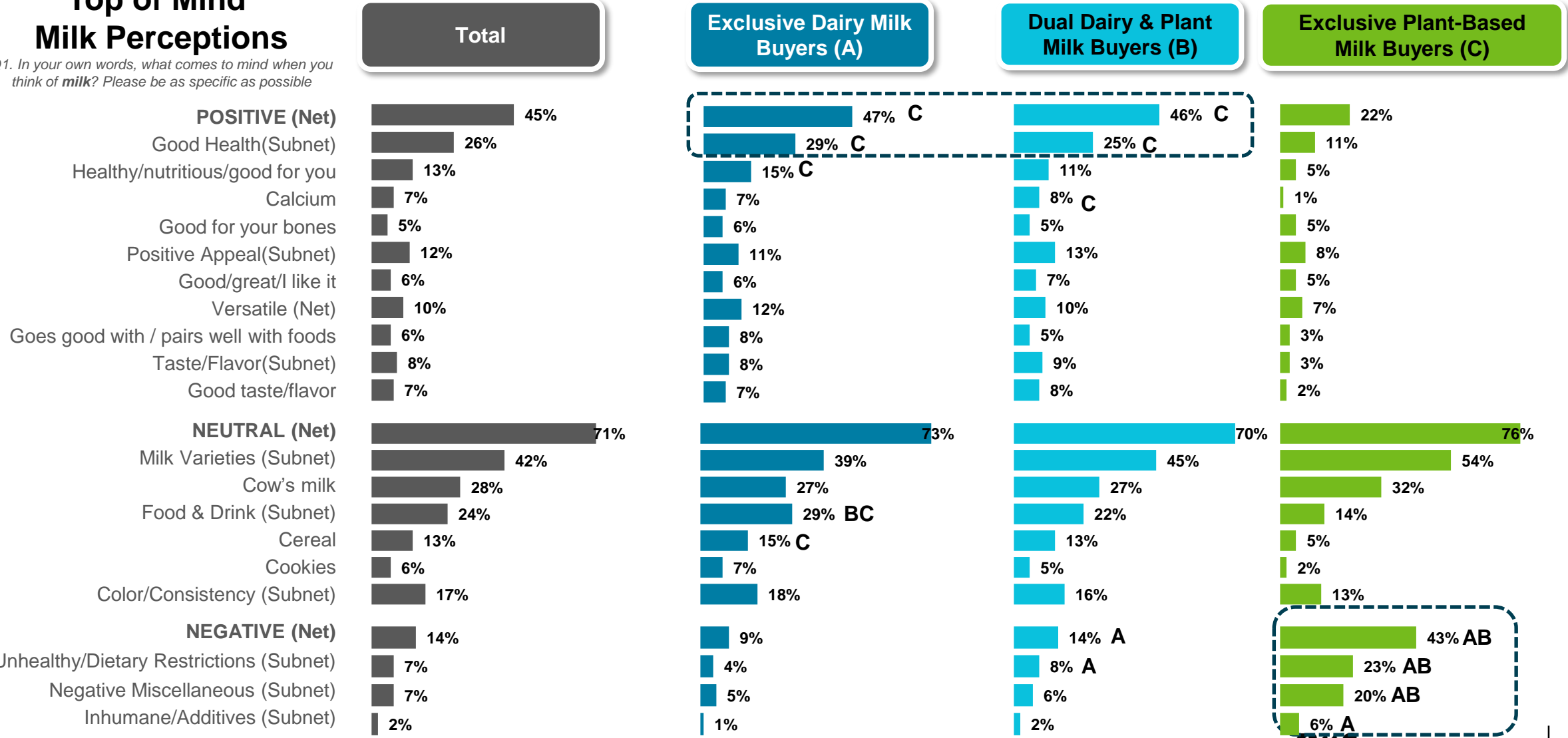
Plant-based milk alternatives are associated with dairy milk by some consumers

- When milk is prominent on the package (e.g., Bolthouse Farms Plant MILK Protein), the association is stronger than when “milk” does not appear on the package (e.g., Rice Dream Rice Drink)

The Term “Milk” Prompts Neutral to Positive Thoughts Overall with Exclusive Dairy Milk and Dual Buyers Mentioning Greater Positives and Exclusive Plant-based Buyers Mentioning Greater Negatives

Top of Mind Milk Perceptions

Q1. In your own words, what comes to mind when you think of milk? Please be as specific as possible

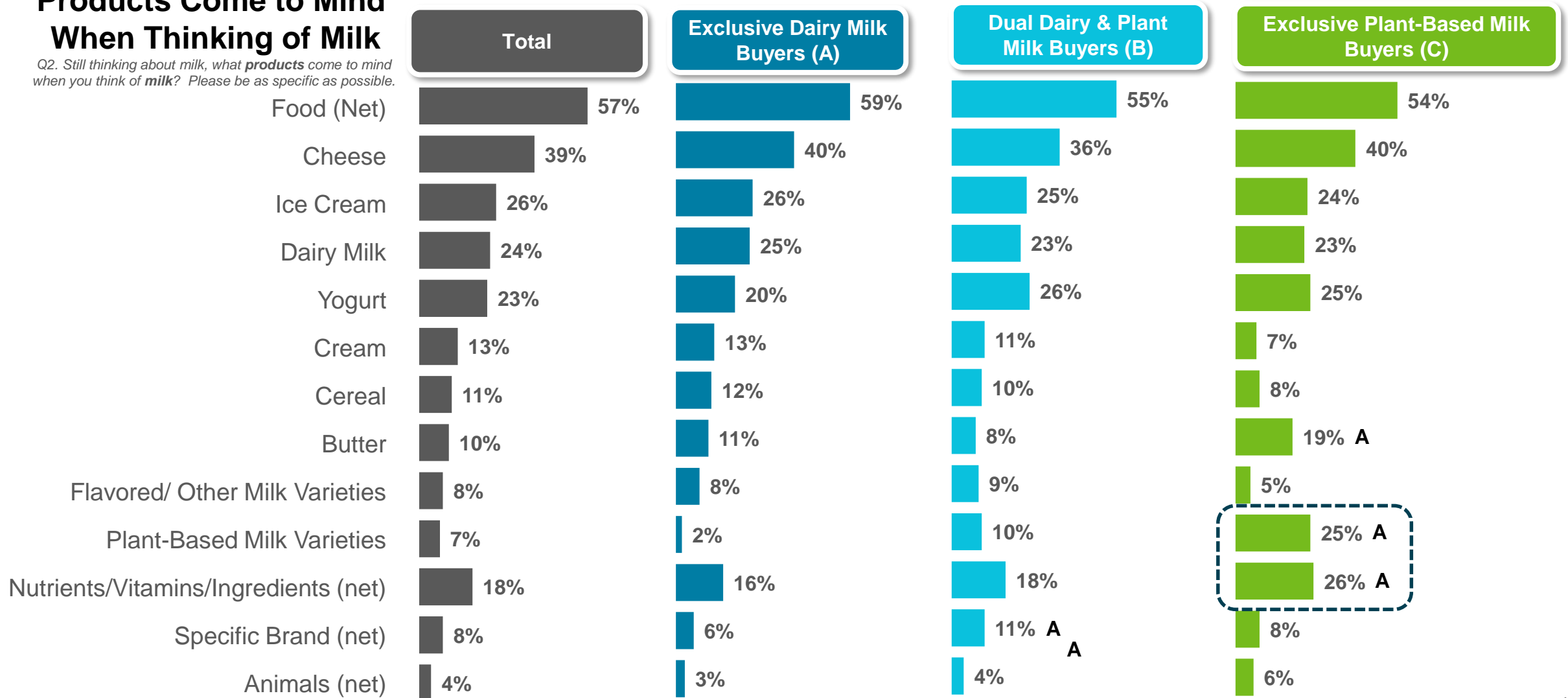


Base: Total general population age 18+ (n=2010); exclusive dairy milk buyers (n=914); dual dairy milk + plant-based milk alternative buyers (n=789); exclusive plant-based milk buyers (n=110). Letters correspond to columns and represent significant difference at 95% level.

Food is Top of Mind, When Thinking About “Milk”. Exclusive Plant-based Milk Buyers are More Likely to Mention Plant-based Milk Varieties & Nutrients.

Products Come to Mind When Thinking of Milk

Q2. Still thinking about milk, what *products* come to mind when you think of *milk*? Please be as specific as possible.



Base: Total general population age 18+ (n=2010); exclusive dairy milk buyers (n=914); dual dairy milk + plant-based milk alternative buyers (n=789); exclusive plant-based milk buyers (n=110). Letters correspond to columns and represent significant difference at 95% level.

Nutrition Equates to General Health in Consumers' Eyes

What Nutrition Means

Q3. Now we would like you to think about nutrition. What does nutrition mean to you? Please be as specific as possible (open-end).

	Total	Exclusive Dairy Milk Buyers (A)	Dual Dairy & Plant Milk Buyers (B)	Exclusive Plant-based Milk Buyers (C)
Health	70%	72%	69%	65%
Healthy/nutritious/good for you	25%	27%	23%	20%
Eating right/healthy/nutritious	25%	26% B	20%	28%
A complete, balanced diet	11%	9%	15% A	12%
Keeps you healthy/keeps you going	8%	7%	8%	10%
Being healthy/healthy lifestyle	7%	8%	6%	9%
Vitamins & Nutrients	14%	14%	14%	16%
Good amount of vitamins	10%	10%	9%	9%
Good amount of minerals	5%	6%	4%	3%
Good amount of nutrients	4%	4%	5%	9% A
Good amount calcium	1%	1%	1%	1%
Ingredients	10%	9%	11%	13%
Good amount of protein	4%	4%	4%	5%
Good amount of vegetables	4%	4%	5%	3%
Good amount of fruits	3%	3%	3%	3%
Good amount of healthy fats/less saturated fat	2%	2%	2%	3%
Good amount of dairy/cheese	1%	1%	2%	1%
Good amount grains/fiber	1%	1%	1%	2%
Good amount of sugar/less sugar	1%	1%	1%	1%
Good amount meats/fish	1%	1%	2% A	*
Good amount carbohydrates	1%	1%	1%	3% B
Good amount sodium/less salt	*	1%	*	*
Miscellaneous	18%	17%	21%	19%
It's essential, important, necessary	7%	5%	10% A	6%
All organic/natural/no additives, preservatives	2%	2%	2%	6% AB
Exercise/staying active	1%	1%	1%	3%

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Dairy Milk Products are Highly Associated with “Dairy Milk”. However, the Association Lessens as Products Evolve from their Original Form.

% Consumers Associating Product Image with DAIRY Milk

Q4. Below are some images of products. For each image, please indicate whether you associate it with *dairy milk* or not.



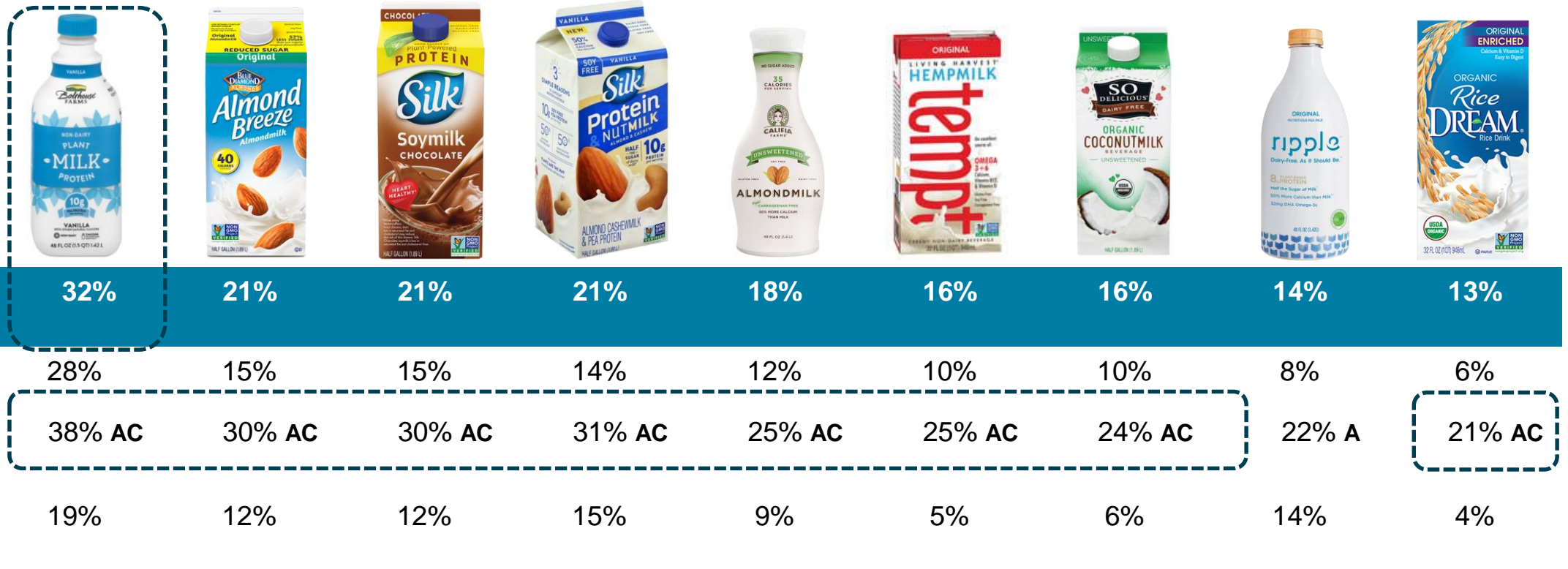
	96%	95%	93%	92%	85%	61%	56%	46%	38%
Total Adults									
Exclusive Dairy Milk Buyers (A)	99% BC	97% BC	94%	91%	83%	55%	47%	35%	29%
Dual Dairy Milk + Plant-based Milk Alternative Buyers (B)	94%	93%	92%	93%	88% A	65% A	65% A	58% A	47% A
Exclusive Plant-based Milk Alternative Buyers (C)	92%	90%	91%	91%	86%	70% A	60% A	64% A	55% A

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The Association of Plant-based Milk Alternatives with Dairy Milk is Strongest when the Term “Milk” is Most Prominent on the Package

% Consumers Associating Product Image with DAIRY Milk

Q4. Below are some images of products. For each image, please indicate whether you associate it with *dairy milk* or not.



Dual dairy and plant milk buyers are most likely to associate plant-based milks with dairy milk

Base: Total general population age 18+ (n=2010); exclusive dairy milk buyers (n=914); dual dairy milk + plant-based milk alternative buyers (n=789); exclusive plant-based milk buyers (n=110). Letters correspond to columns and represent significant difference at 95% level.

Nearly All Adults have Purchased Dairy Milk (92%); About Half Bought Plant-based Milk in the Past Year with Almond the Most Frequently Purchased

Frequency of Purchase Among General Population
Q5a. Please indicate how frequently you purchase each of the following

	Dairy Milk (Net)	Skim (fat free)	1% (reduced fat)	2% (reduced fat)	Whole	Plant-Based Milk (Net)	Almond	Soy	Coconut	Cashew	Rice	Pea Milk
Ever (Net)	92%	54%	57%	71%	65%	52%	47%	29%	29%	23%	18%	13%
Past Year (Subnet)	90%	46%	46%	62%	55%	46%	41%	23%	23%	17%	13%	10%
Past 6 month (Sub-Subnet)	88%	41%	39%	56%	49%	41%	36%	19%	20%	14%	11%	9%
Once a month or more (Sub-Subnet)	82%	35%	29%	45%	39%	31%	25%	12%	12%	9%	7%	6%
Once a week or more often	48%	17%	11%	20%	19%	12%	8%	3%	3%	3%	2%	2%
Once every 2 or 3 weeks	25%	12%	11%	15%	13%	11%	9%	5%	4%	3%	3%	2%
Once month/every four weeks	9%	7%	7%	9%	7%	8%	8%	4%	5%	3%	3%	2%
Once every 2 or 3 months	4%	4%	6%	6%	6%	6%	6%	3%	5%	3%	2%	2%
Once every 4 to 6 months	2%	2%	4%	5%	4%	4%	4%	3%	2%	2%	1%	2%
Once or twice a year	2%	5%	6%	6%	6%	5%	5%	4%	4%	3%	2%	1%
Less often than once a year	2%	8%	11%	9%	10%	6%	7%	6%	5%	5%	5%	3%
Never	8%	46%	43%	29%	35%	48%	53%	71%	71%	77%	82%	87%

Dairy Milk is Associated with a Wide Range of Benefits, Particularly Taste and Nutrition. Dual Buyers Associate Both Milk and Plant-based Alternatives with Nutrition & Protein While Exclusive Plant-based Alternative Buyers are Much More Likely to Associate Plant Beverages with Nutrition.

Attribute Association	Total Adults		Exclusive Dairy Milk Buyers		Dual Buyers		Exclusive Plant-based Milk Alternative Buyers	
	Dairy Milk Associations	Plant-based Milk Alternative Associations	Dairy Milk Associations (A)	Plant-based Milk Alternative Associations (B)	Dairy Milk Associations (C)	Plant-based Milk Alternative Associations (D)	Dairy Milk Associations (E)	Plant-based Milk Alternative Associations (F)
It is a good source of calcium	75%	24%	81% BCE	12%	71% DE	37% B	52% F	37% B
It tastes good	66%	29%	76% BCE	10%	62% DE	44% B	31%	75% EBD
It is nutritious	65%	48%	73% BCE	37%	59% E <i>no difference</i>	60% B	32%	65% EB
It is healthy	64%	54%	74% BCE	44%	58% E	63% CB	26%	70% EB
It's a good source of vitamins & minerals	61%	40%	69% BCE	31%	55% DE	48% B	29%	50% EB
It's safe to consume	60%	56%	70% BCE	46%	54% E	63% CB	29%	65% EB
It's reasonably priced	53%	17%	57% BCE	7%	49% D	27% B	35%	32% B
It's a good source of protein	52%	37%	56% BCE	30%	49% <i>no difference</i>	44% B	38%	55% EB
It's all natural	41%	38%	46% BCE	33%	36%	42% CB	26%	54% EBD
It contains 9 essential vitamins & minerals	36%	20%	40% BCE	14%	33% D	27% B	23%	26% B
It has a limited number of ingredients	36%	27%	39% BC	20%	33%	33% B	27%	33% B
It comes from a sustainable food source	34%	46%	40% CE	42%	31% E	50% CB	12%	55% EB
It contains no added sugar	33%	19%	35% BC	15%	30% D	24% B	27%	29% B
It contains no artificial ingredients	30%	19%	34% BCE	15%	28% DE	23% B	14%	33% EB
It's produced in environmentally responsible way	22%	31%	27% CE	28%	18% E	33% C	9%	55% EBD
It contains no additives	21%	17%	23% B	13%	20%	21% B	16%	28% EB
Manufacturers are transparent about how the milk is produced	19%	18%	20% B	14%	20%	22% B	13%	25% EB
It's low in fat	18%	41%	21% E	36% A	17% E	46% CB	5%	47% E
It's low in calories	15%	39%	17% E	33% A	14%	44% CB	6%	58% EBD

Q6. Based on what you know or have heard, please select the statements that apply to each of the following types of milk. Dairy Milk, Plant-Based Milk. Letters correspond to columns and represent significant difference at 95% level. Columns A&B, C&D, E&F tested as well as A&C&E and B&D&F.

Seven in 10 Adults View Almond Milk as Having the Same or More Protein, Vitamins and Key Nutrients Compared to Dairy Milk, Exclusive Plant-based Milk Buyers are More Likely to Believe that Almond Milk has More.

Nutrition Perceptions of Almond Milk

Q7. Thinking about **Almond Milk**, would you say that almond milk contains... (Select one)

	Total				Exclusive Dairy Milk Buyers (A)				Dual Buyers (B)				Exclusive Plant-based Milk Buyers (C)			
	The Same or More than Dairy Milk	More than Dairy Milk	Same as Dairy Milk	Less than Dairy Milk	The Same or More than Dairy Milk	More than Dairy Milk	Same as Dairy Milk	Less than Dairy Milk	The Same or More than Dairy Milk	More than Dairy Milk	Same as Dairy Milk	Less than Dairy Milk	The Same or More than Dairy Milk	More than Dairy Milk	Same as Dairy Milk	Less than Dairy Milk
Protein	77%	30%	48%	23%	73%	22%	51% BC	27% B	82%	37% A	44%	18%	79%	44% A	35%	21%
Sugar	60%	27%	33%	40%	66%	32% BC	34%	34%	57%	23%	34%	43% A	44%	20%	23%	56% AB
Vitamins	78%	22%	56%	22%	73%	15%	58%	27% BC	83%	28% A	55%	17%	86%	38% A	48%	13%
Key Nutrients (e.g., Calcium, Potassium)	68%	17%	52%	32%	58%	9%	49%	42% BC	78%	24% A	54% C	22%	74%	33% A	41%	26%
Calories	53%	14%	39%	47%	57%	14%	43% BC	43%	50%	15%	35% C	50% A	34%	13%	20%	67% AB
Fat	41%	11%	30%	59%	43%	10%	32% C	57%	42%	13%	29% C	58%	24%	6%	18%	76% AB

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Similarly, the Majority of Adults Perceive Soy Milk as having the Same or More Protein, Vitamins and Key Nutrients as Dairy Milk. Exclusive Plant-based Milk Buyers have Stronger Views.

Nutrition Perceptions of Soy Milk

Q7. Thinking about **Soy Milk**, would you say that soy milk contains... (Select one)

Total

Exclusive Dairy Milk Buyers (A)

Dual Buyers (B)

Exclusive Plant-based Milk Buyers (C)

	The Same or More than Dairy Milk	More than Dairy Milk	Same as Dairy Milk	Less than Dairy Milk	The Same or More than Dairy Milk	More than Dairy Milk	Same as Dairy Milk	Less than Dairy Milk	The Same or More than Dairy Milk	More than Dairy Milk	Same as Dairy Milk	Less than Dairy Milk	The Same or More than Dairy Milk	More than Dairy Milk	Same as Dairy Milk	Less than Dairy Milk
Protein	75%	24%	50%	25%	70%	18%	52% C	30% B	79%	30% A	49% C	20%	77%	44% AB	33%	23%
Sugar	59%	22%	36%	41%	59%	21%	38% C	41%	60%	23%	37% C	40%	44%	19%	24%	56% AB
Vitamins	73%	16%	57%	27%	67%	11%	56%	33% BC	78%	22% A	56%	22%	82%	29% A	53%	18%
Key Nutrients (e.g., Calcium, Potassium)	66%	14%	52%	34%	57%	9%	50%	41% BC	72%	20% A	52%	28%	76%	29% A	48%	24%
Calories	52%	12%	40%	48%	52%	12%	40%	48%	54%	15%	39%	46%	44%	7%	36%	57%
Fat	40%	9%	31%	60%	40%	8%	32%	60%	43%	12% A	31%	57%	29%	6%	22%	72% B

Base: Total general population age 18+ (n=2010); exclusive dairy milk buyers (n=914); dual dairy milk + plant-based milk alternative buyers (n=789); exclusive plant-based milk buyers (n=110). Letters correspond to columns and represent significant difference at 95% level.

Coconut Milk is Also Perceived as Having the Same or More Protein, Vitamins and Key Nutrients Compared to Dairy Milk by the Majority of Adults. Exclusive Plant-based Milk Buyers Express Stronger Views.

Nutrition Perceptions of Coconut Milk

Q7. Thinking about **Coconut Milk**, would you say that coconut milk contains... (Select one)

	Total				Exclusive Dairy Milk Buyers (A)				Dual Buyers (B)				Exclusive Plant-based Milk Buyers (C)			
	The Same or More than Dairy Milk	More than Dairy Milk	Same as Dairy Milk (B)	Less than Dairy Milk (C)	The Same or More than Dairy Milk	More than Dairy Milk (A)	Same as Dairy Milk (B)	Less than Dairy Milk (C)	The Same or More than Dairy Milk	More than Dairy Milk (A)	Same as Dairy Milk (B)	Less than Dairy Milk (C)	The Same or More than Dairy Milk	More than Dairy Milk (A)	Same as Dairy Milk (B)	Less than Dairy Milk (C)
Protein	62%	16%	46%	38%	59%	13%	46%	41% B	67%	21% A	46%	33%	66%	27% A	40%	33%
Sugar	68%	33%	36%	32%	71%	35% C	36%	29%	69%	31%	38%	31%	51%	23%	29%	49%AB
Vitamins	71%	16%	55%	29%	65%	11%	53%	35%BC	77%	20% A	57%	23%	80%	35%AB	46%	20%
Key Nutrients (e.g., Calcium, Potassium)	66%	15%	51%	34%	58%	10%	48%	42%BC	72%	19% A	53%	28%	82%	29% A	52%	19%
Calories	60%	21%	39%	40%	62%	22%	40%	38%	61%	20%	41%	39%	54%	21%	32%	47%
Fat	54%	21%	33%	46%	54%	20%	34% C	46%	56%	23%	33% C	44%	45%	28%	18%	55%

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Purchase Drivers Vary by Product. Taste and Price are More Important Drivers of Dairy Milk While Health, Digestive Benefits and Longer Shelf Life are More Important Factors Driving Plant-based Milk Purchasing. Nutrition is Equally Important to Both Products.

Purchase Decision Factors
 Q8. Which of the following are important in your decision to purchase dairy milk and/or plant-based milk?

	Exclusive Dairy Milk Buyers	Exclusive Plant-based Milk Alternative Buyers
	Dairy Milk (A)	Plant-Based Milk (B)
Taste	74% B	58%
Price	59% B	42%
Nutrition	53%	62%
Health	46%	65% A
Satisfies entire family	46% B	23%
Wide variety of uses	42% B	30%
Safety of the product	35%	45%
Digestive benefits	15%	50% A
Longer shelf life	16%	51% A
Manufacturers are transparent about how the milk is produced	15%	36% A
Animal welfare	10%	30% A
Lactose-free	7%	49% A
None of these	2%	4%

Base: Total general population age 18+ (n=2010); exclusive dairy milk buyers (n=914); dual dairy milk + plant-based milk alternative buyers (n=789); exclusive plant-based milk buyers (n=110). Letters correspond to columns and represent significant difference at 95% level.

For Dual Buyers, Nutrition and Health are Important Decision Factors For both Dairy Milk and Plant-based Alternative Purchase - While Taste & Price are More Important Factors for Dairy Milk Purchase

Purchase Decision Factors

Q8. Which of the following are important in your decision to purchase dairy milk and/or plant-based milk?

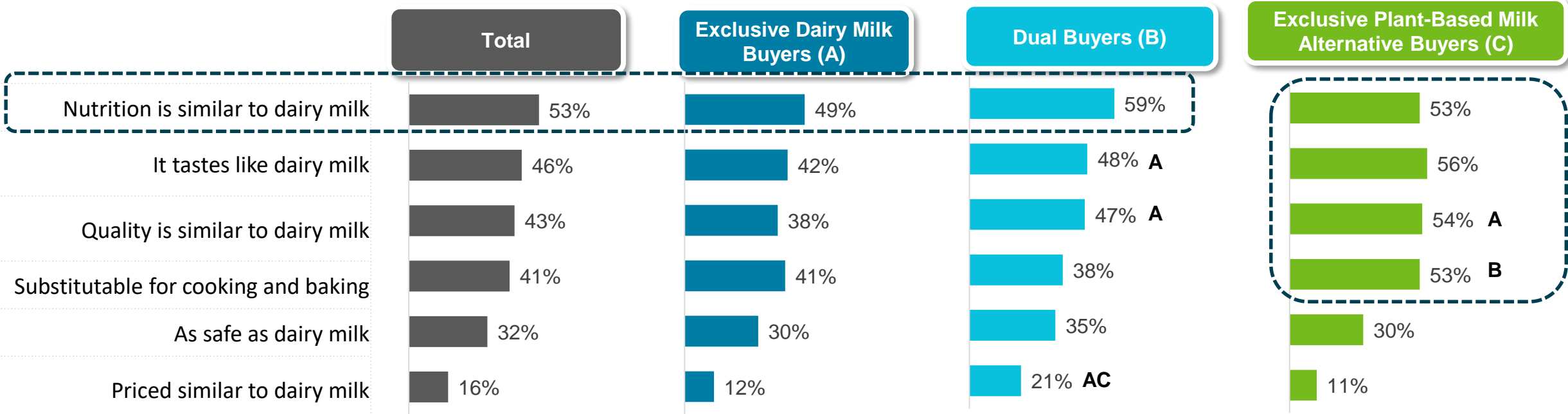
	Dual Buyers	
	Dairy Milk Purchase Drivers (A)	Plant-Based Milk Purchase Drivers (B)
Taste	61% B	51%
Price	50% B	36%
Nutrition	51%	51%
Health	45%	48%
Satisfies entire family	42% B	23%
Wide variety of uses	38% B	27%
Safety of the product	33%	30%
Digestive benefits	23%	38% A
Longer shelf life	18%	39% A
Manufacturers are transparent about how the milk is produced	18%	21%
Animal welfare	20%	22%
Lactose-free	15%	35% A
None of these	2%	4% A

Base: Total general population age 18+ (n=2010); exclusive dairy milk buyers (n=914); dual dairy milk + plant-based milk alternative buyers (n=789); exclusive plant-based milk buyers (n=110). Letters correspond to columns and represent significant difference at 95% level.

The #1 Reason Consumers Believe Plant-based Milks are Label “Milk” “Milk” is Because Products are Comparable to Dairy Milk on Nutrition. Exclusive Plant-based Milk Alternative Buyers Cite Nutrition, Taste, Quality and Baking/Cooking Substitute Equally as Reasons for Calling Product “Milk”.

Why Would a Manufacturer Label a Product Milk if it Does not Contain Milk?

Q9. Below are some reasons why a manufacturer would label a product “milk” even though the product may not contain dairy milk. Please select the reasons why you believe a manufacturer would label a product “milk”



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Purchasers of Plant-based Milks are More likely to Believe that Plant-based Milks have the Same Nutritional Content as Dairy Milks

Nutritional Content Is Similar to Dairy Milk

Q10. How much do you agree or disagree that plant-based milks have the same nutritional content as dairy milk products?

	Total	Exclusive Dairy Milk Buyer (A)	Dual Buyer (B)	Exclusive Plant-based Milk Buyer (C)
Strongly/Somewhat Agree	41%	24%	60% A	68% A
Strongly Agree	13%	4%	22% A	37% AB
Somewhat Agree	28%	20%	38% A	32% A
Neither Agree or Disagree	32%	42% BC	20%	17%
Strongly/Somewhat Disagree	26%	34%	20%	15%
Somewhat Disagree	17%	19% C	17% C	5%
Strongly Disagree	9%	15% B	3%	10% B

Plant-Based Milk Purchasers are More Inclined to Purchase Plant-based Beverages Regardless of Their Name While Exclusive Dairy Milk Purchasers are Less Inclined

Plant-Based Alternative Name Purchase Intent

Q11. Thinking about plant-based milk, how likely would you be to purchase each of the following?

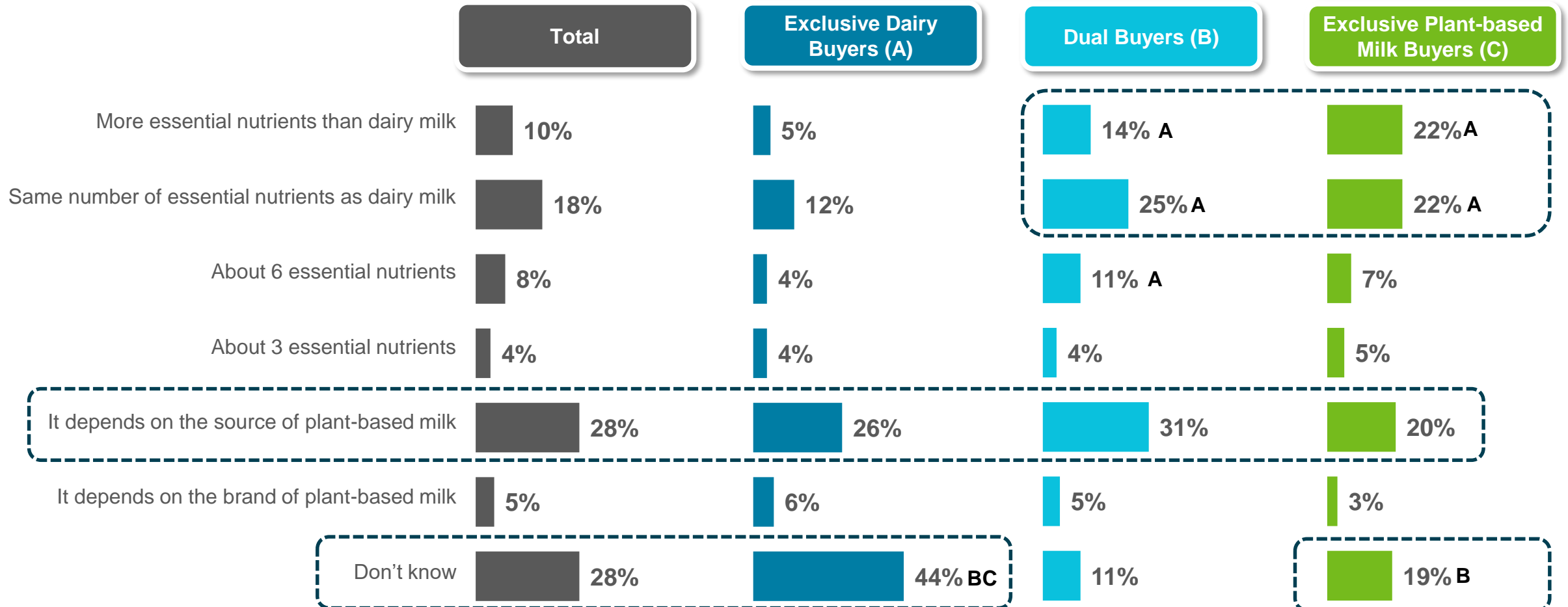
	Total			Exclusive Dairy Milk Buyer (A)			Dual Buyers (B)			Exclusive Plant-based Milk Alternative Buyers (C)		
	More inclined to purchase	Neither more or less inclined to purchase	Less inclined to purchase	More inclined to purchase	Neither more or less inclined to purchase	Less inclined to purchase	More inclined to purchase	Neither more or less inclined to purchase	Less inclined to purchase	More inclined to purchase	Neither more or less inclined to purchase	Less inclined to purchase
Plant-based Juice	27%	35%	38%	14%	36% B	51%BC	45% A	26%	29% C	54%A	29%	17%
Plant-based Drink	25%	35%	40%	9%	35%	56%BC	48% A	26%	26% C	65%AB	23%	12%
Plant-based Beverage	24%	36%	40%	9%	35% B	56%BC	46% A	29%	25% C	63%AB	28%	9%

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Most Consumers Either do not Know the Number of Essential Nutrients and Vitamins in Plant-based Milks or Believe it Depends on the Source. Plant-based Milk Buyers are More Inclined to Say “Same” or “More” Essential Nutrients as Dairy Milk.

Plant-based Milk Essential Nutrient and Vitamin Content

Q12. Dairy milk contains 9 essential nutrients and vitamins. Would you say that plant-based milk contains...?



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Appendix

Plant-Based Milk buyers are More Likely to Purchase *Vegan Cheese* if Labeled as “Cultured Nut Product” than Exclusive Dairy Milk Buyers.

Purchase Intent Of Vegan Cheese if Labeled As ‘Cultured Nut Product’

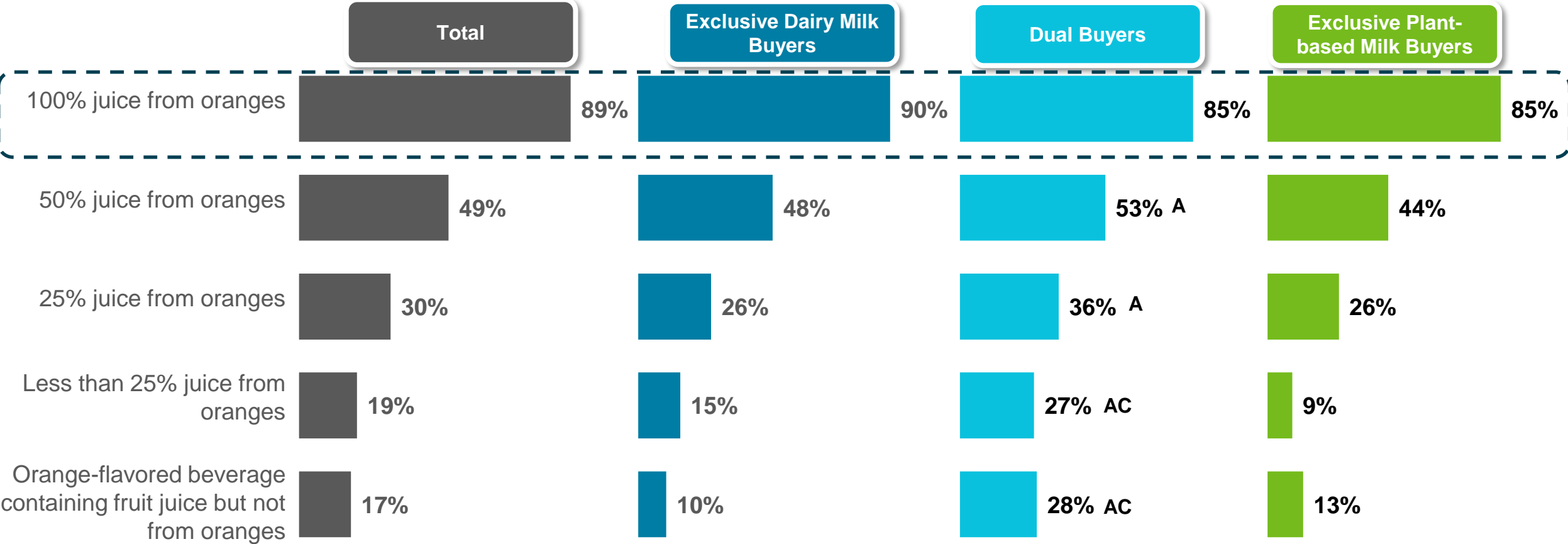
Q13. How likely would you be to purchase vegan cheese if it were labeled as a “cultured nut product”?

	Total	Exclusive Dairy Milk Buyers (A)	Dual Buyers (B)	Exclusive Plant-Based Alternative Beverage Buyers (C)
Definitely/Probably Would Buy (Net)	19%	5%	35% A	43% A
Definitely would buy	8%	1%	15% A	26% AB
Probably would buy	11%	4%	21% A	17% A
Might or might not buy	20%	16%	24% A	21%
Probably would not buy	23%	26% BC	20%	14%
Definitely would not buy	38%	53% BC	21%	22%
Definitely/Probably Would Not Buy (Net)	61%	79% BC	41%	36%

Consumers are Aligned – they Believe Beverages Labeled “Orange Juice” Should Contain 100% Juice from Oranges

Agreement on Orange Juice Labeling Strongly/Somewhat Agree

Q14. How much do you agree or disagree that a beverage can be labeled as “orange juice” if it contains...



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