

Understanding Dairy Consumers' Purchasing Behaviors and Habits

June 2021



Methodology

One thousand and fourteen online surveys were conducted among dairy-consuming adults ages 18-80 from April 1 to April 6, 2021 and were weighted to ensure proportional results.

The Bayesian confidence level for 1,000 interviews is 3.5, which is roughly equivalent to a margin of error ± 3.1 at the 95% confidence level.

Statistical Significance

Something is statistically significant if the result cannot be attributed to random chance. Statistical significance in this presentation should be compared within each demographic (e.g. age, race, gender, etc.).

For example, if the responses from female respondents is considered to be significant, it is in relation to male respondents and not necessarily other demographic groups.

This research was supported with funding from the International Dairy Foods Association.



Executive Summary

Key Findings

- **Dairy consumers opt for dairy-based products more frequently than plant-based, non-dairy alternatives**

Most Americans who consume dairy-based products reported that they eat or drink them multiple times a week. At the same time, nearly half consume plant-based, non-dairy alternatives once a week or more. Dairy-based cheese, butter, ice cream, milk, yogurt and yogurt-based drinks are preferred to their plant-based counterparts, particularly for cheese.

- **Consumers choose yogurt based on taste, and prefer products described as “natural”**

Yogurt consumers are also interested in health benefits, including general health and wellness as well as specific digestive and gut health benefits. Protein and calcium content are important nutritional value-related reasons to select yogurt.

- **Consumers are more familiar with “probiotics” than “live and active cultures”**

Nearly half are very familiar with and knowledgeable about probiotics, compared with one in three who say the same about live and active cultures. Most people who have at least heard the term “*contains live and active cultures*” believe it indicates a product that is better for them .

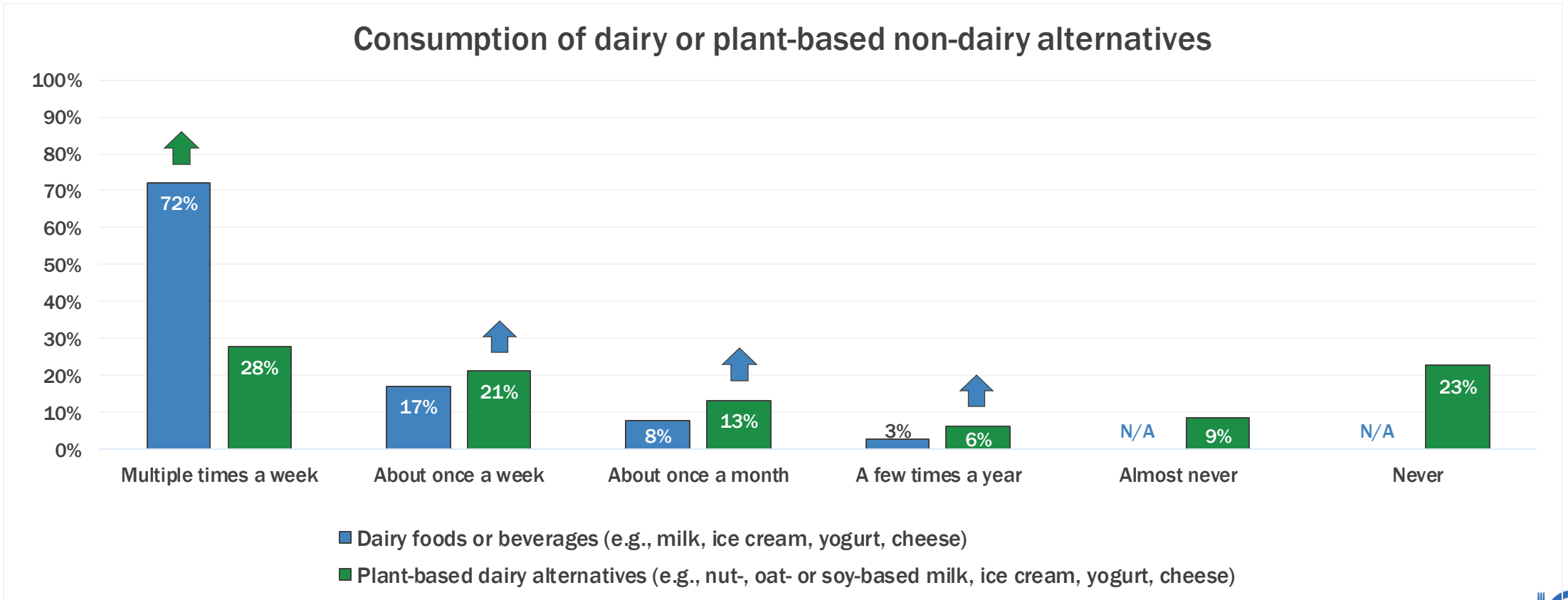
- **Most people trust claims on food packaging**

Consumers are trusting overall in the groups who verify packaging label and symbols. There is a higher level of trust in government agencies than manufacturers, retailers and third-party organizations.

Dairy and Plant-based Dairy Consumption



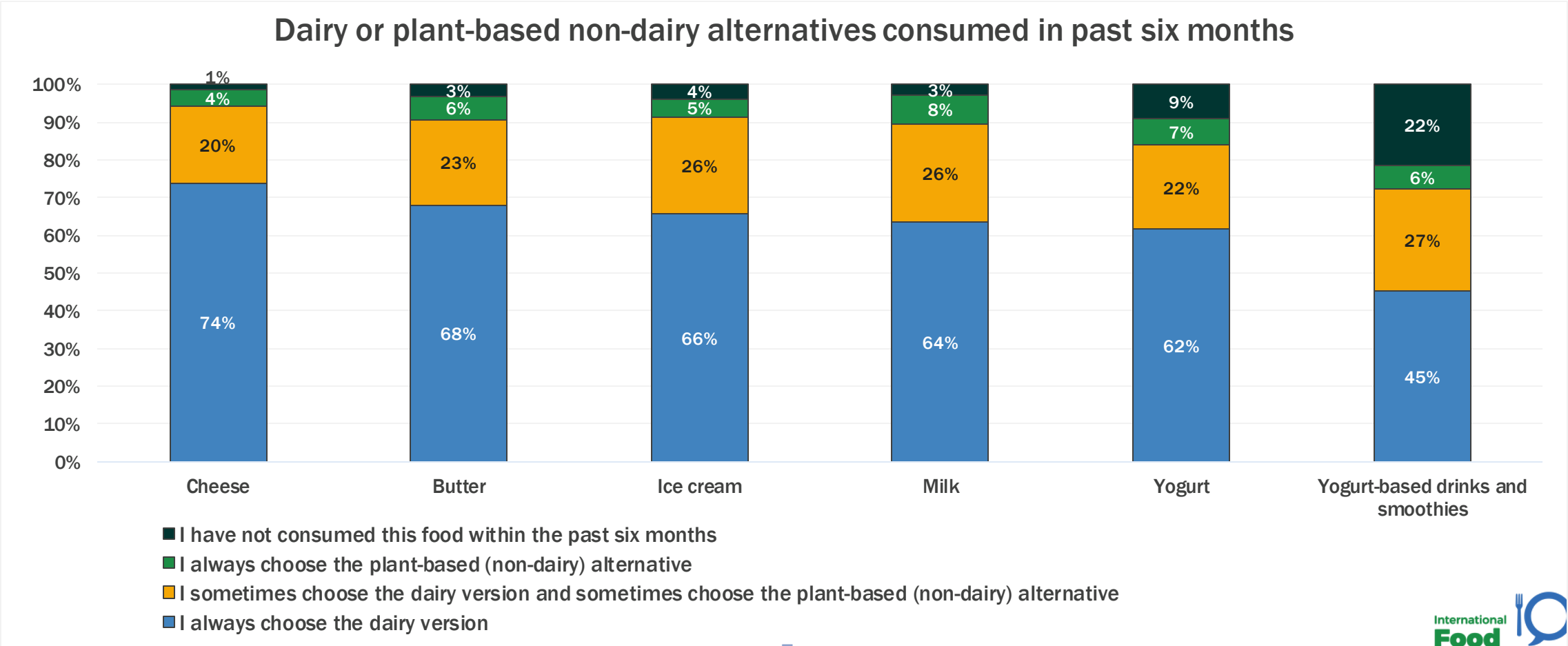
Nearly 3 out of 4 who consume dairy foods or beverages do so multiple times a week, significantly higher than the roughly 1 out of 4 who consume plant-based non-dairy alternatives at the same frequency



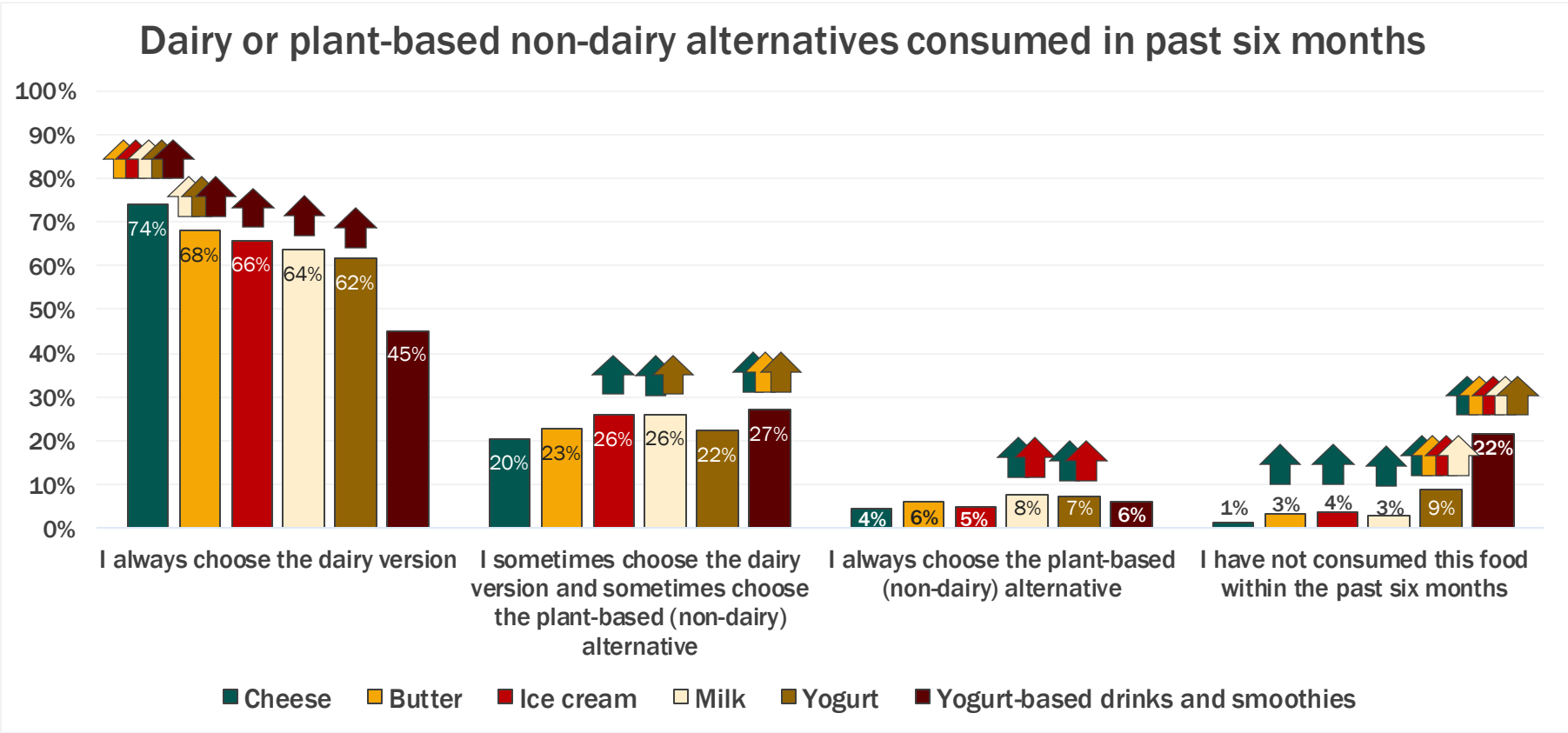
↑ Statistical significance indicated by arrow

Q1: Please select how often you consume the following. [RESPONDENTS WHO SELECTED "ALMOST NEVER" OR "NEVER" CONSUME DAIRY FOODS/BEVERAGES WERE TERMINATED FROM SURVEY] n = 1,014

Among dairy consumers, more choose the dairy version of cheese, butter, ice cream, milk, yogurt and yogurt-based drinks than plant-based alternatives; however, at least 1 in 4 at least sometimes choose the plant-based alternatives



Cheese was the product with the strongest dairy-specific selection, with 3 out of 4 indicating they always choose the dairy version

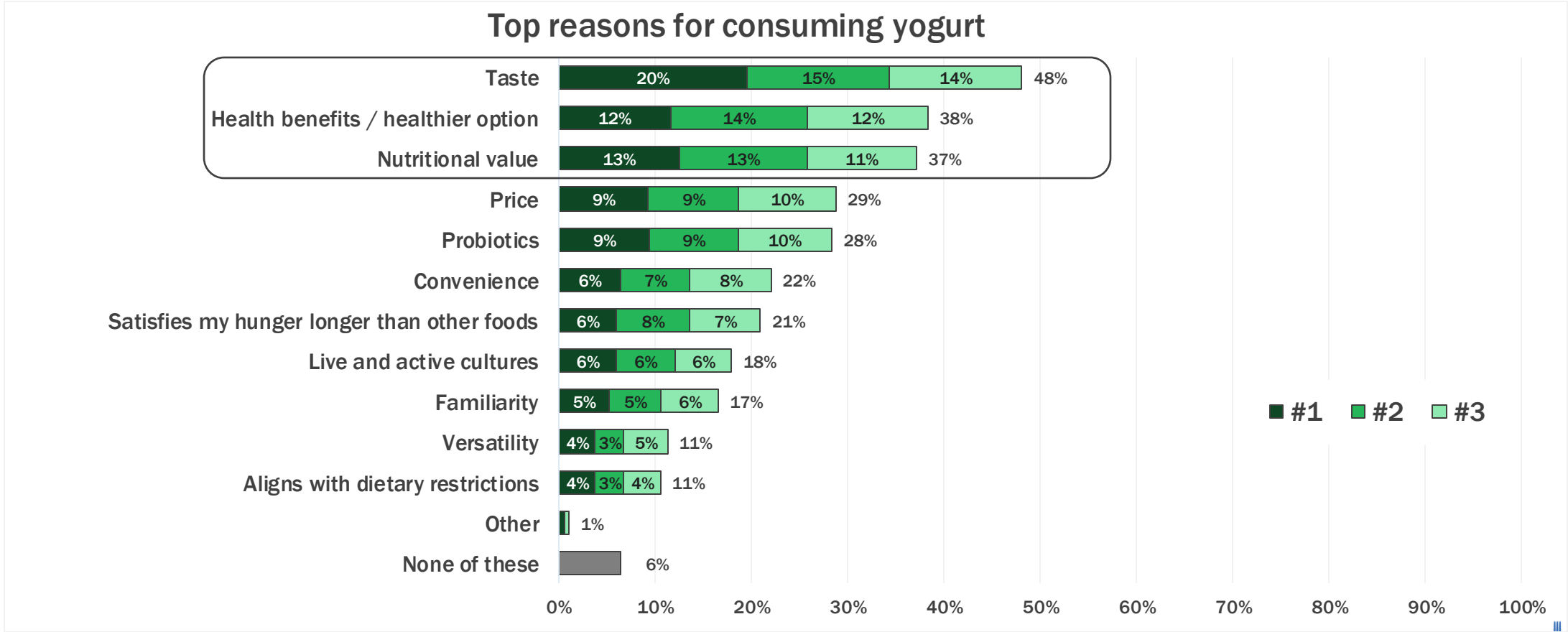


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Consumer-desired Qualities in Yogurt Products

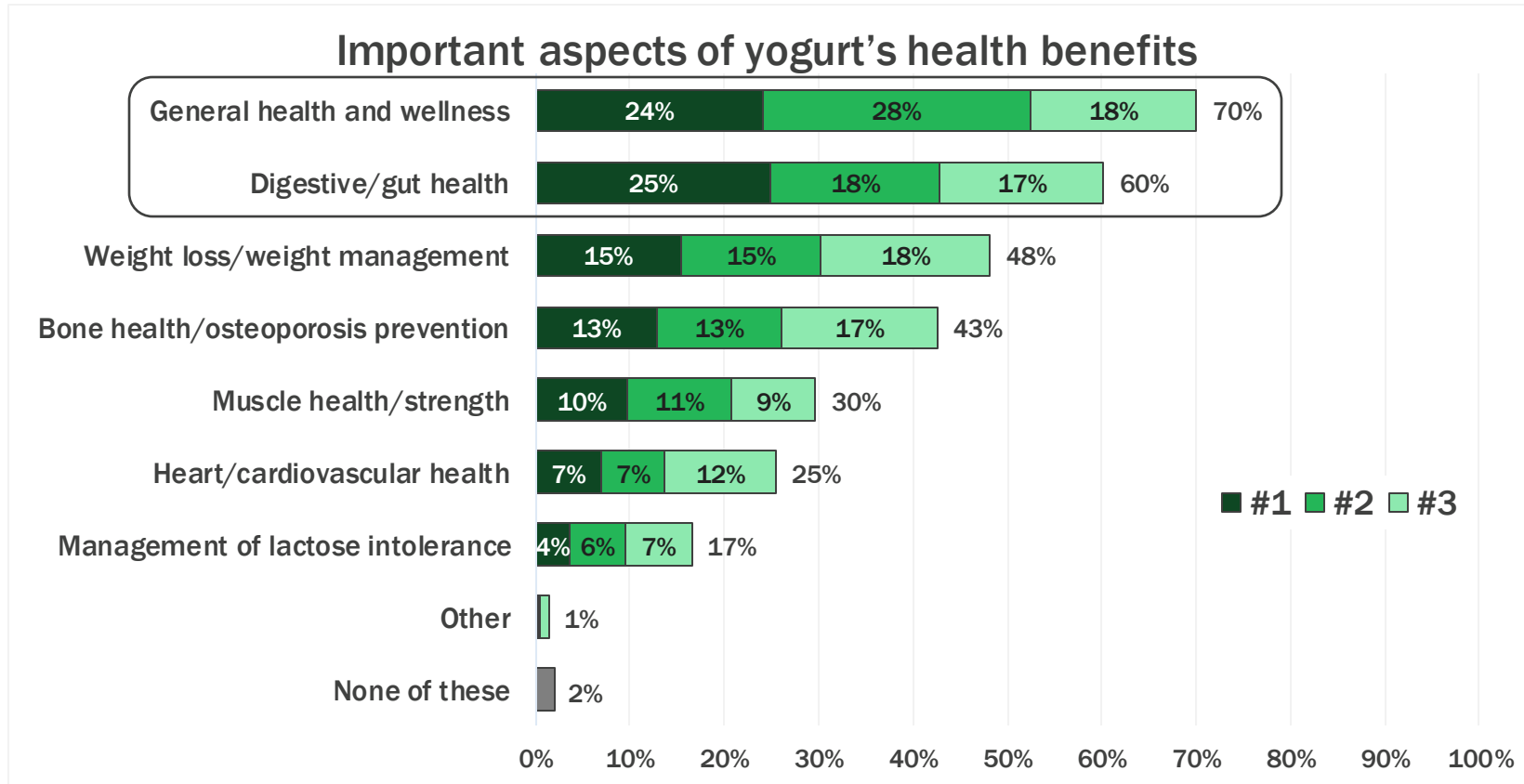
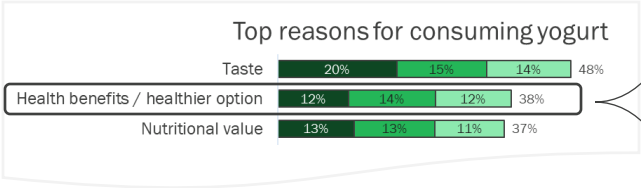


Nearly half of yogurt consumers indicate “taste” is a top reason for consuming yogurt; a focus on health is also a priority

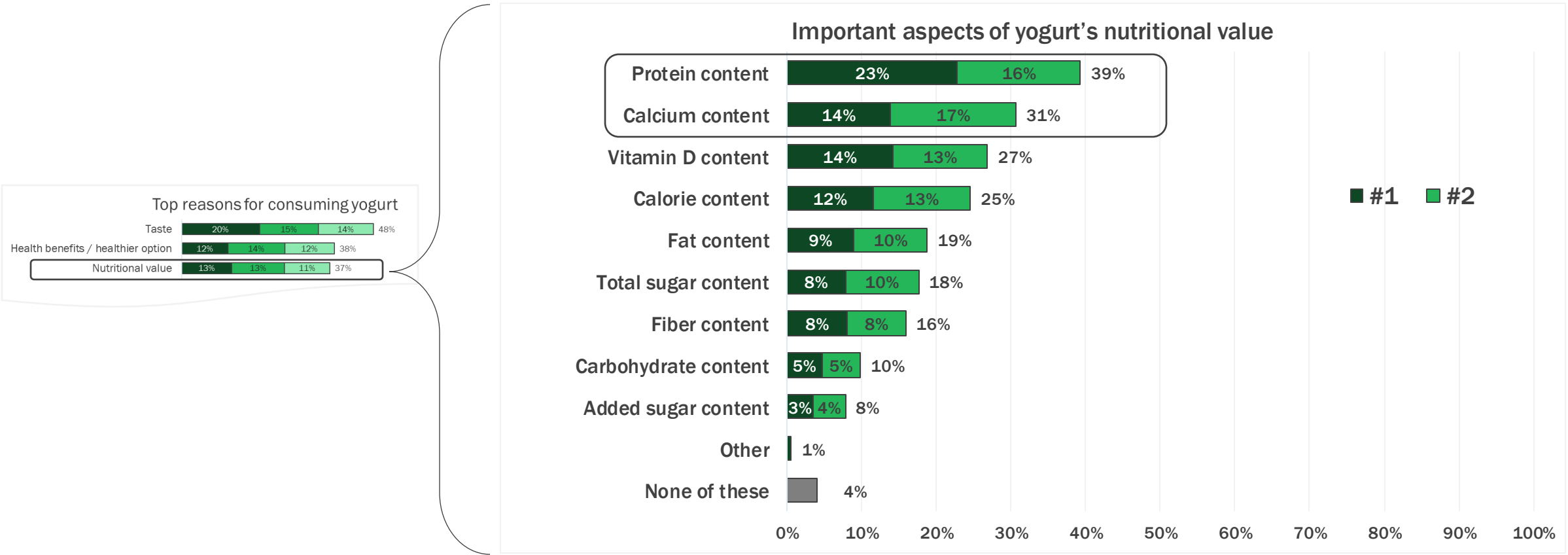


Q6: You indicated that you have consumed yogurt (dairy or plant-based) within the past six months. Please select your top three reasons for consuming yogurt. [consumed dairy and/or plant-based yogurt in past 6 months from Q2] n = 932

Of those who eat yogurt for health benefits, *general health/wellness* and *digestive/gut health* were the most commonly selected benefits that are important to them

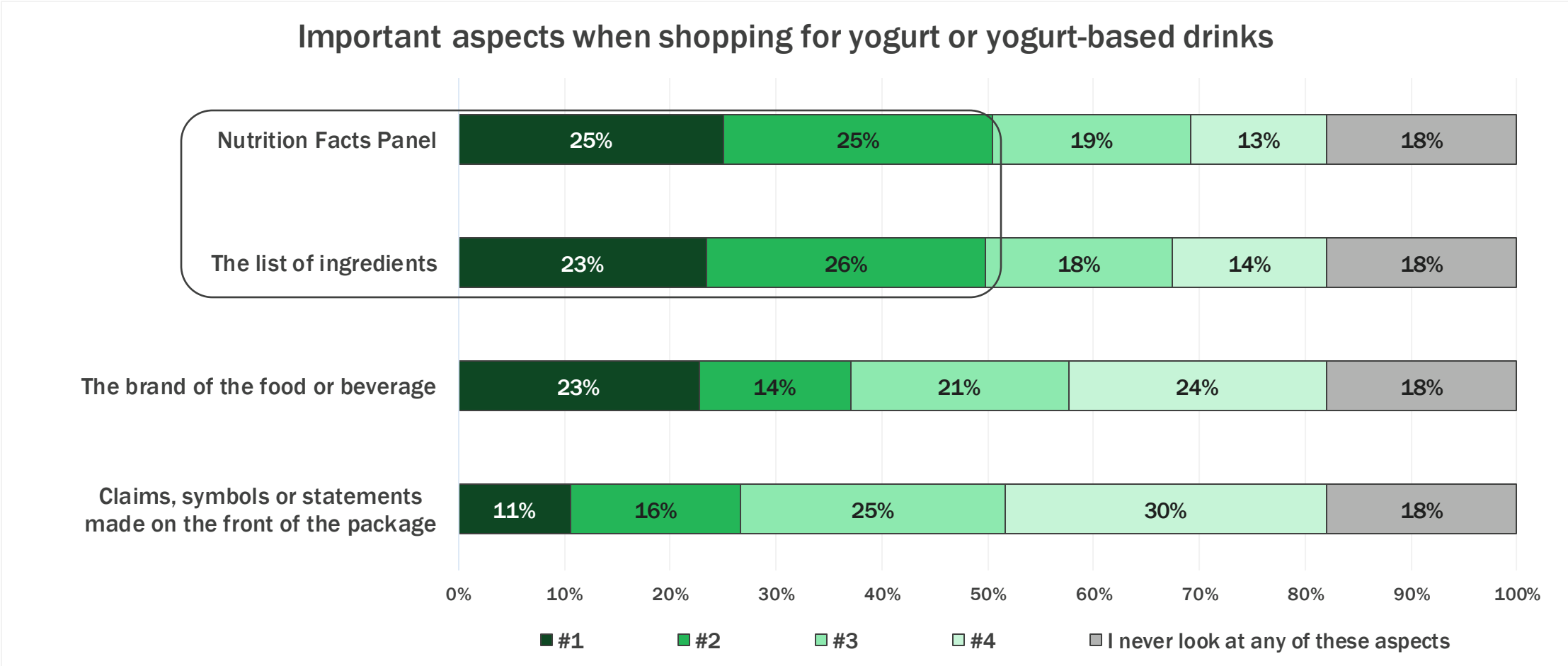


Of those who eat yogurt for its nutritional value, *protein content* was the most commonly selected component that is important to them, followed by *calcium content*



Q7: When eating yogurt (dairy or plant-based), you indicated that “Nutritional value” is among your top reasons for consuming yogurt. What about yogurt’s nutritional value is important to you? Select your top two.
[nutritional value selected as top 3 reasons for consuming yogurt from Q6] n = 346

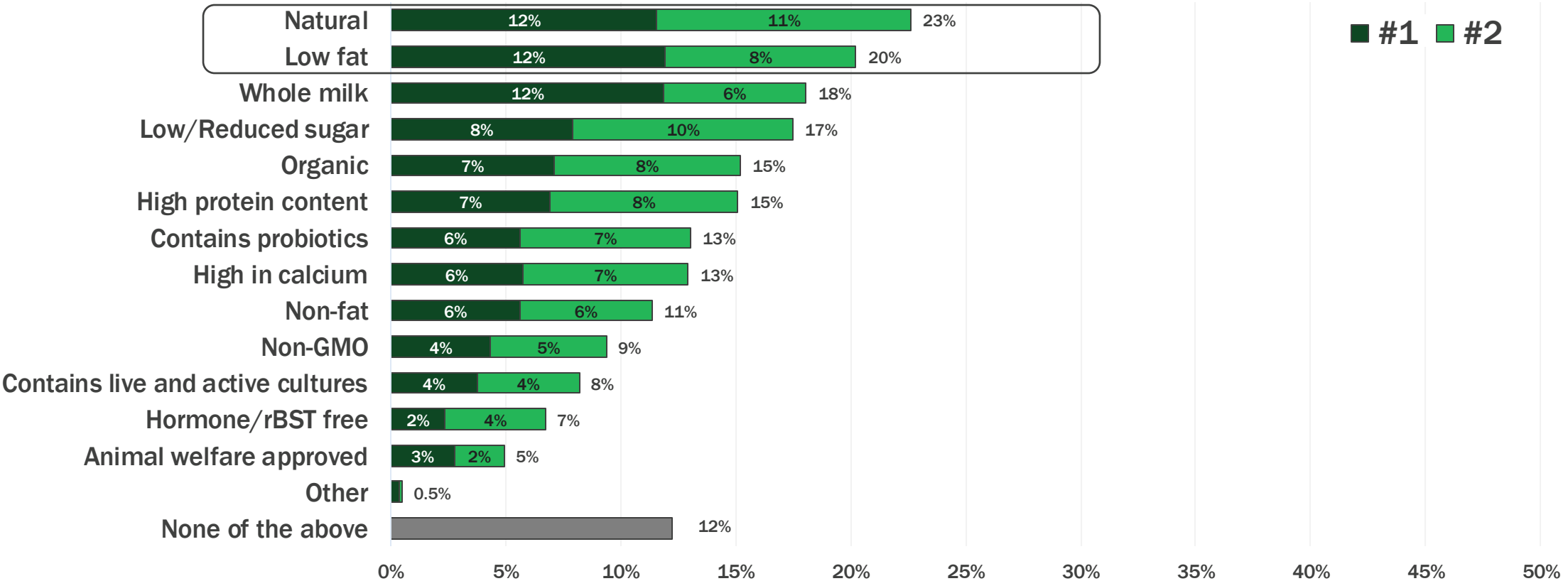
Half of yogurt consumers indicate that the Nutrition Facts Panel and list of ingredients are top-rated aspects when shopping for yogurts



Q5: When shopping for yogurt or yogurt-based drinks, please select the following aspects in order of importance (rank 1-4, with 1 being the most important). [consumed dairy and/or plant-based yogurt in past 6 months from Q2] n = 932

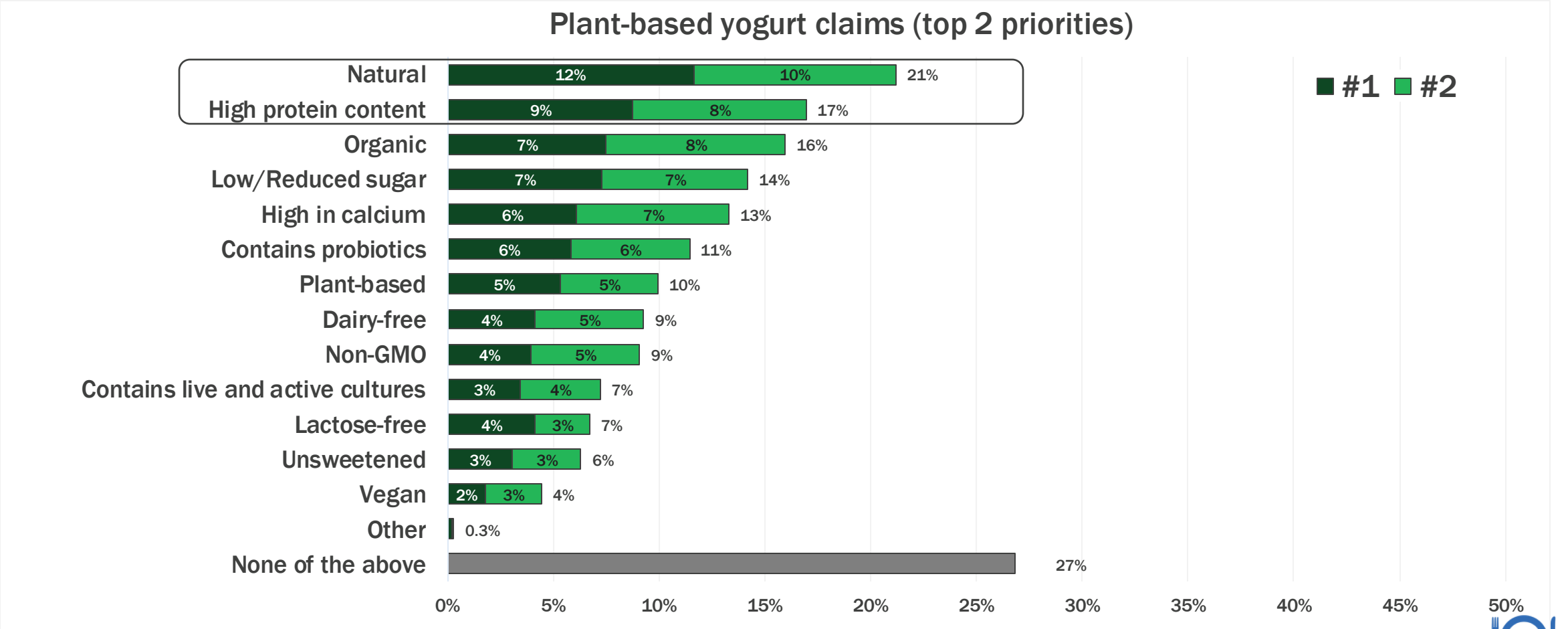
When considering dairy-based yogurts, nearly 1 out of 4 seek out products that claim to be “*natural*” and 1 out of 5 seek out “*low fat*” claims

Dairy-based yogurt claims (top 2 priorities)

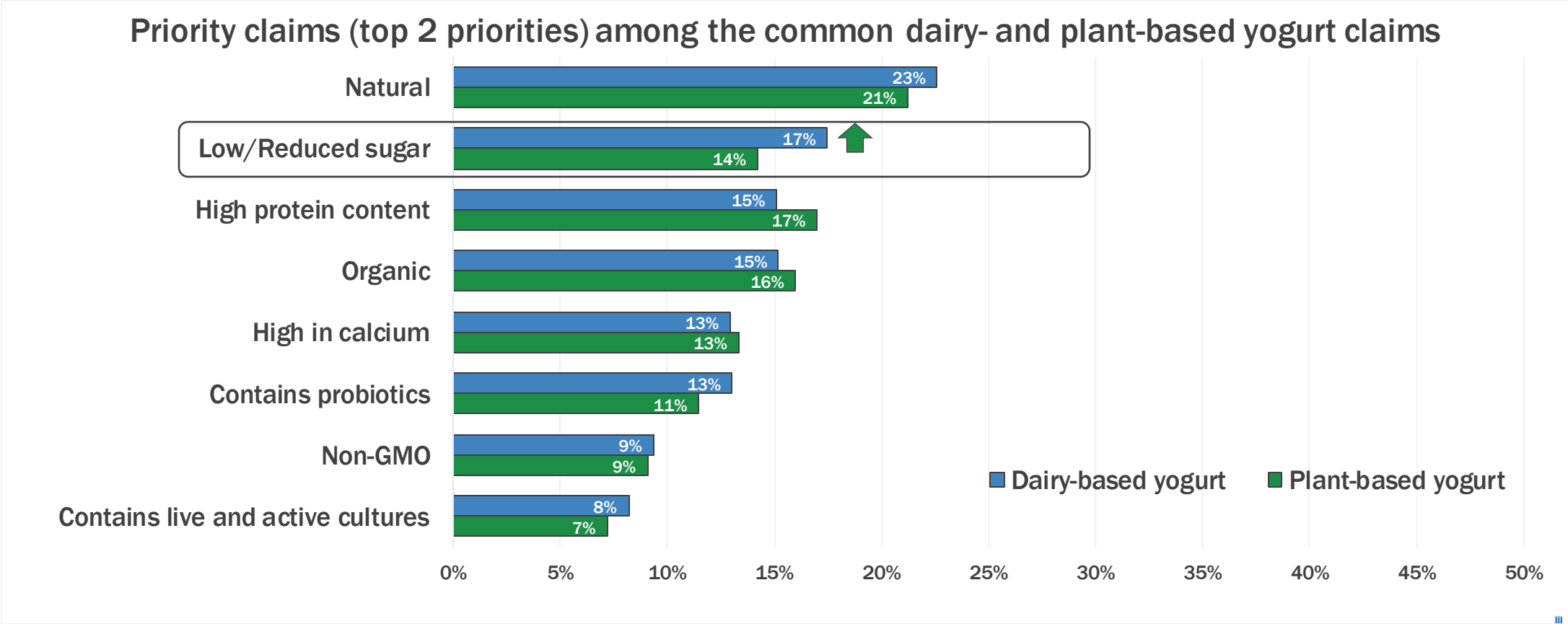


Q3: When shopping for dairy-based yogurt, what types of claims (if any) do you seek out? Rank your top two with 1 being top priority. n = 1,014

When considering plant-based yogurts, 1 out of 5 seek out products that claim to be “*natural*” and 17% seek out “*high protein content*” claims



Of the claims common to dairy- and plant-based yogurt products, a significantly higher proportion of dairy- than plant-based yogurt consumers identified “*low/reduced sugar*” as one of their top 2 priorities



↑ Statistical significance indicated by arrow

Q3: When shopping for dairy-based yogurt, what types of claims (if any) do you seek out? Rank your top two with 1 being top priority. n = 1,014
Q4: When shopping for plant-based yogurt, what types of claims (if any) do you seek out? Rank your top two with 1 being top priority. n = 1,014

Impressions of “Live and Active Cultures”



Similarly, the term “contains live and active cultures” also elicits mainly positive or informative word associations

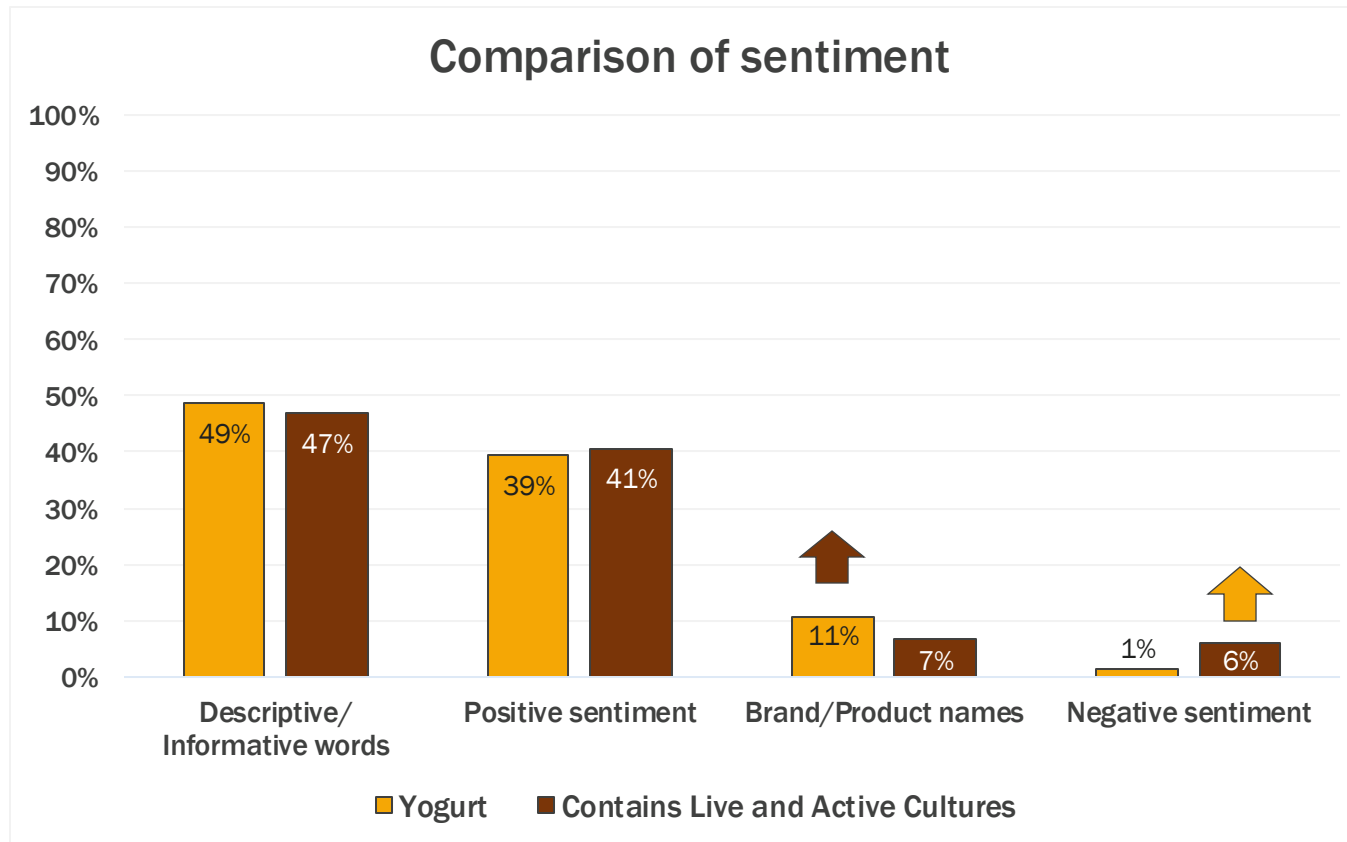


The most common word associations include:
“healthy,”
“good,”
“probiotics,”
“gut,”
“digestion,”
“bacteria”

- Key:
- Descriptive/Informative words
 - Brand/Product names
 - Positive sentiment
 - Negative sentiment

Q9: When you think about the term “Yogurt” and the label “Contains Live and Active Cultures” on yogurt (dairy or plant-based) packaging, what comes to mind? [open end] NOTE: n = 389 (38%) of respondents indicated “don’t know,” “nothing,” or other equivalent nondescript response and were excluded; the remaining n = 625 respondents indicated 1+ words: n = 930 words included in the summary

Nearly half of the word associations for “yogurt” and “contains live and active cultures” were descriptive in nature (e.g., *dairy, probiotics*), and 2 out of 5 had a positive sentiment (e.g., *healthy, good*)

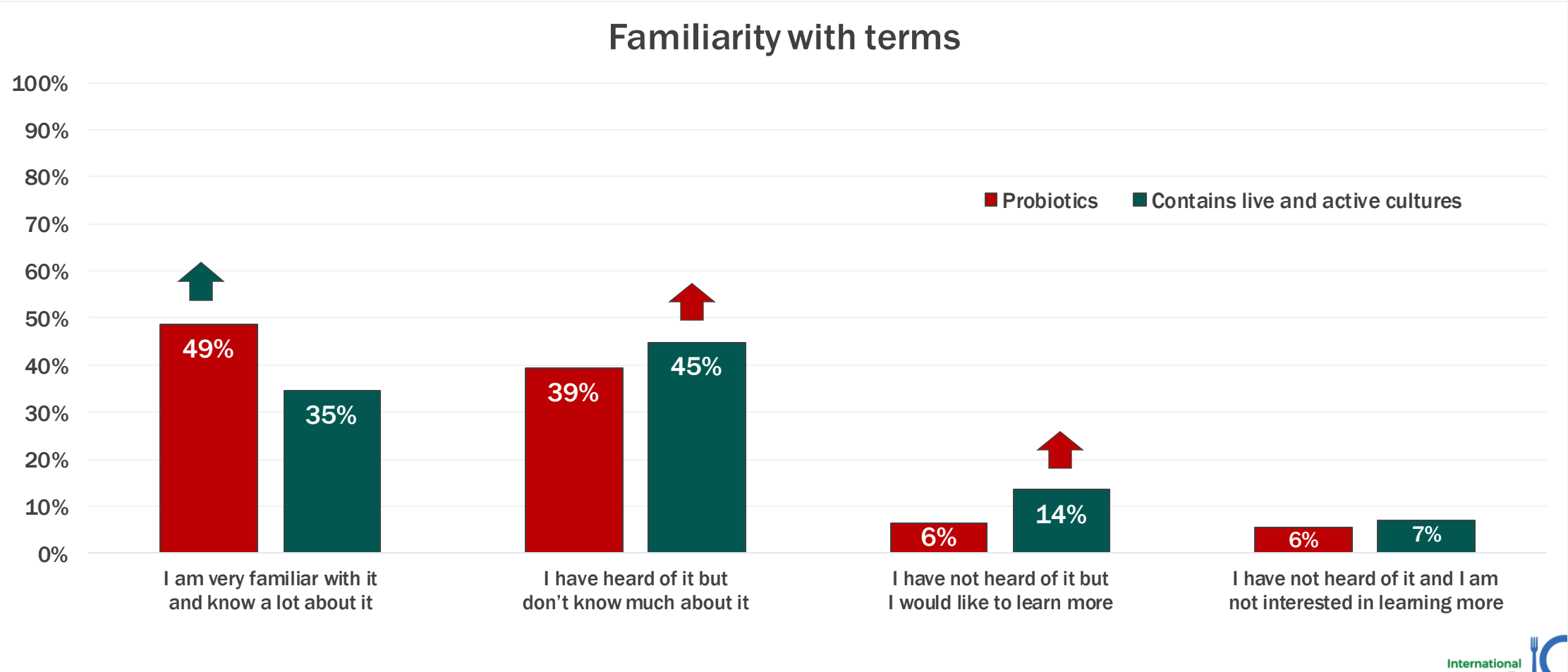


- A significantly higher proportion of brand names were used to describe “yogurt” than “contains live and active cultures”
- While overall negative sentiment is low, there were a significantly higher proportion of negative words used to describe “contains live and active cultures” (including “don’t eat it,” “yuck,” “gross”) than “yogurt”



Statistical significance indicated by arrow

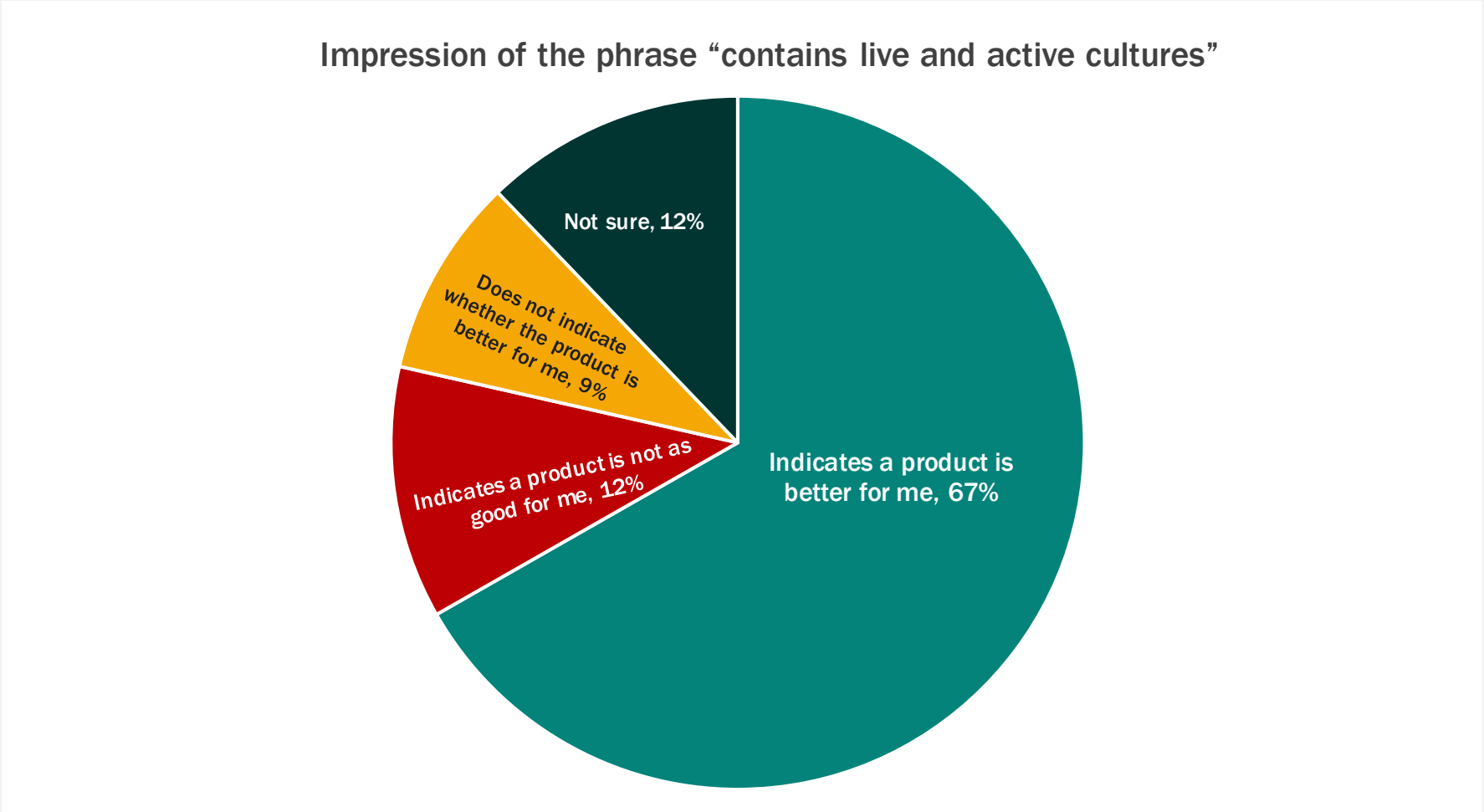
Nearly half are very familiar with and knowledgeable about probiotics; 45% have heard of live and active cultures but don't know much about the term



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Q10: The phrases “Contains live and active cultures” and “Probiotics” are sometimes found on food and beverage packages, including some yogurts. Which of these statements best describes your familiarity and interest with these terms? n = 1,014

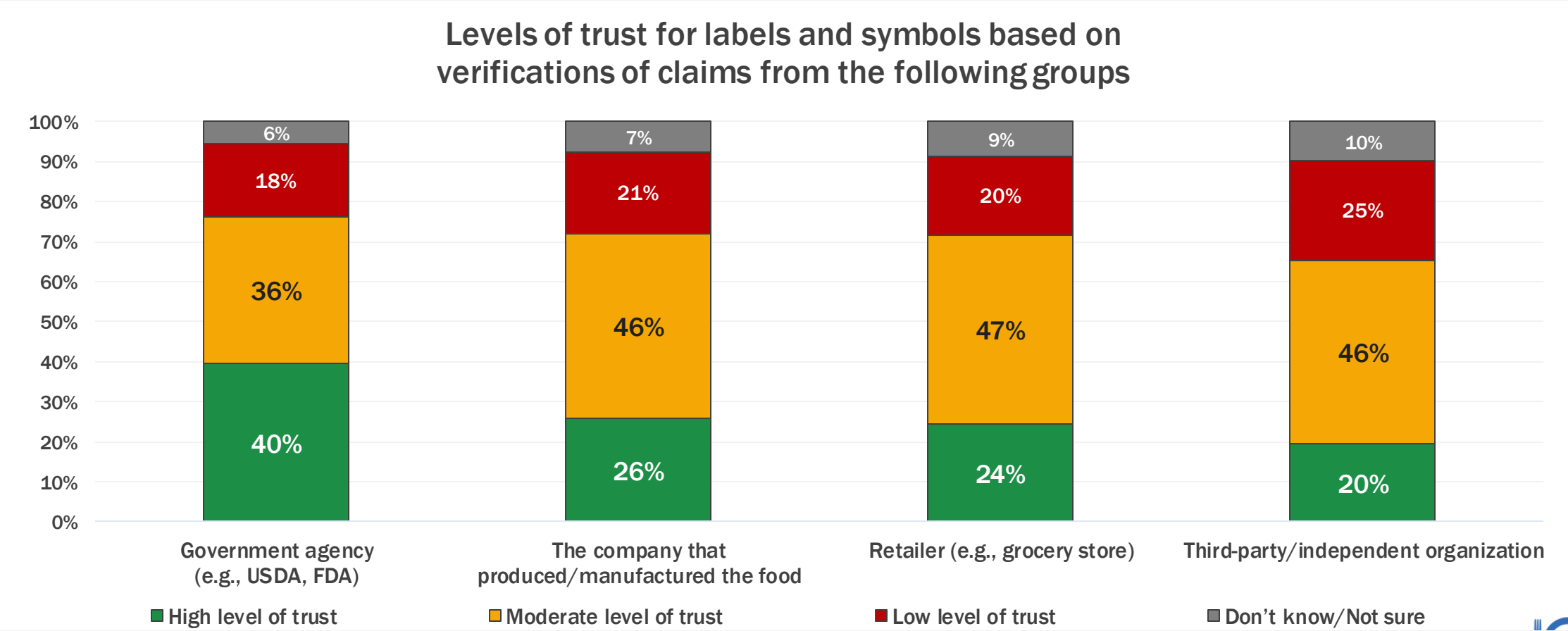
More than 2 out of 3 who have at least heard the term “contains live and active cultures” believe it indicates a product that is better for them



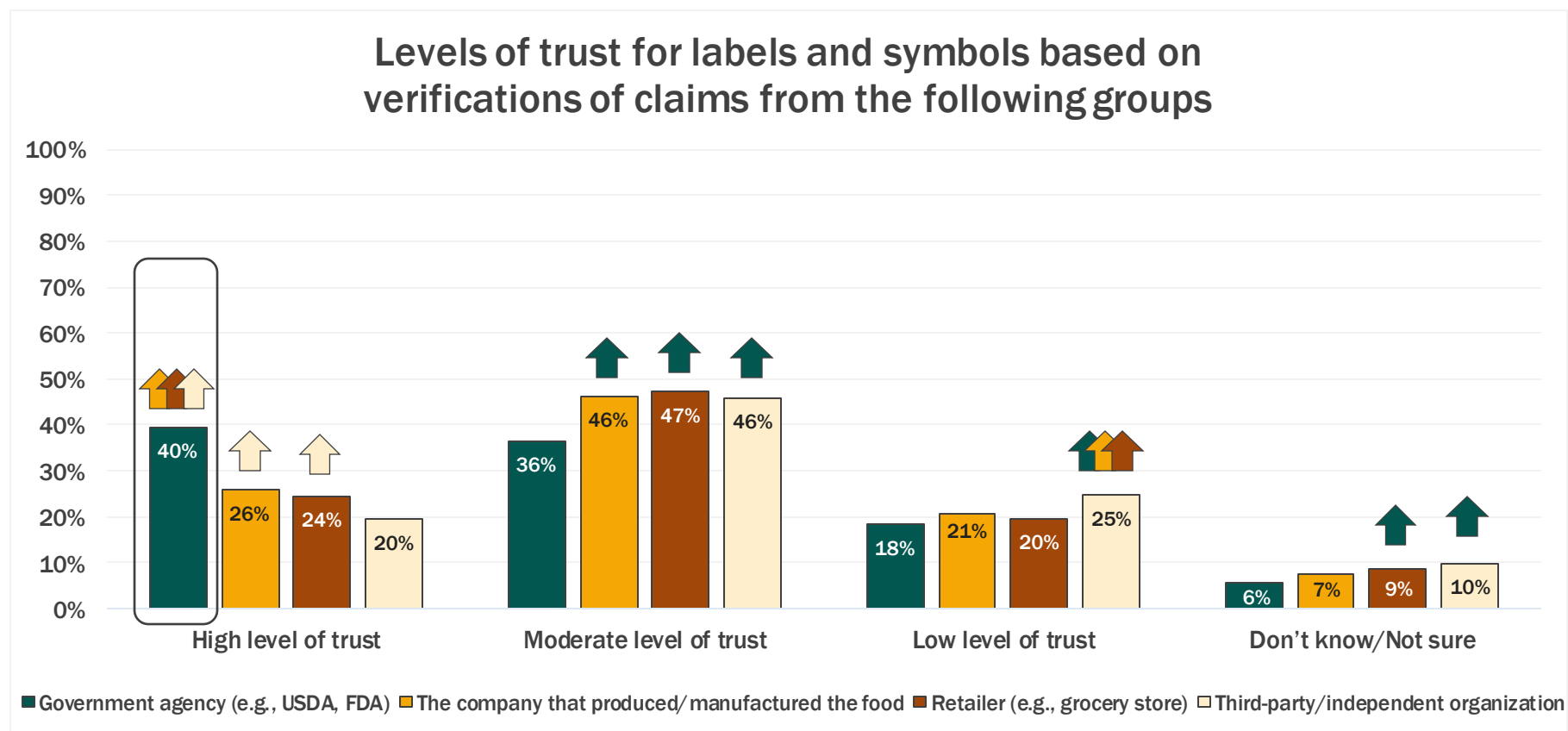
Trustworthiness of Claims on Food and Beverage Packaging



More than 7 out of 10 have a moderate or high level of trust for verification of packaging labels/symbols by government agencies, manufacturers, and retailers; 2 in 3 have moderate or high level of trust for third-party organizations



A significantly higher proportion indicate a higher level of trust in government agencies for label/symbol claim verification than manufacturers, retailers, and third-party organizations



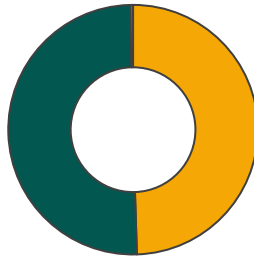
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Demographics

Demographics

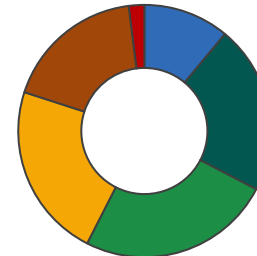
Gender

- Female (49.5%)
- Male (50.1%)
- Prefer to self-describe (0.4%)

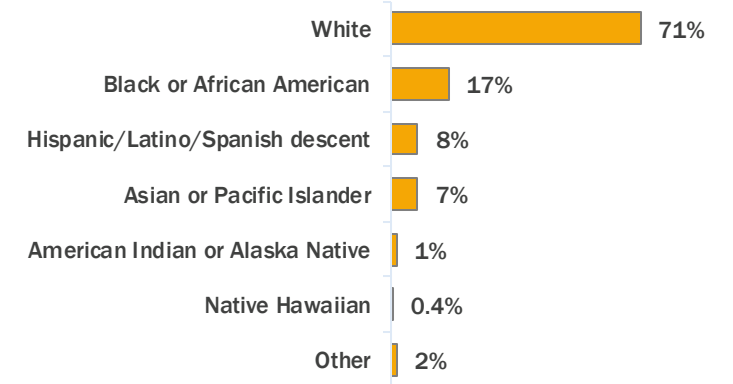


Age

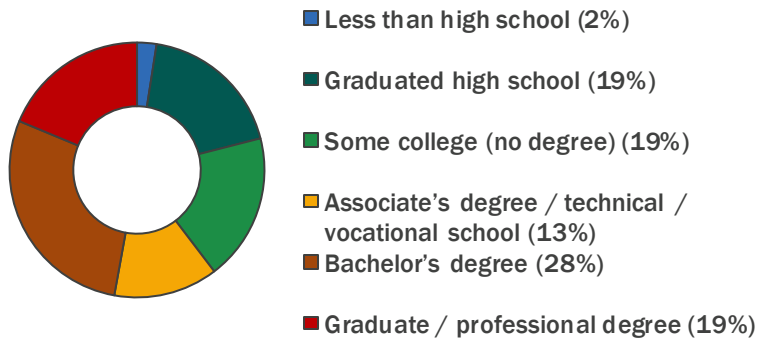
- 18-24 years old (11%)
- 25-34 years old (22%)
- 35-44 years old (25%)
- 45-54 years old (22%)
- 55-64 years old (18%)
- 65-79 years old (2%)



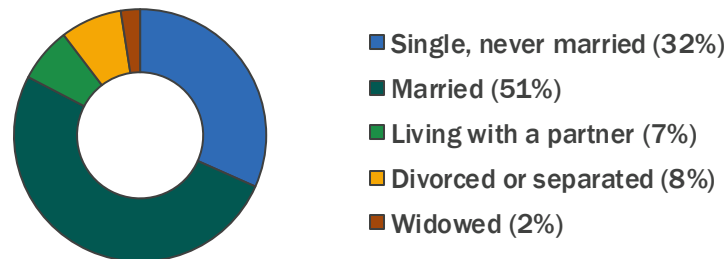
Race or Ethnicity*



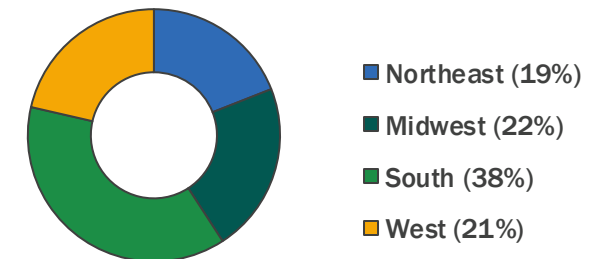
Education



Marital Status



Region





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International Food
Information Council



Appendix

Q1: Please select how often you consume the following

		Dairy foods or beverages (e.g., milk, ice cream, yogurt, cheese)				Plant-based non-dairy alternatives (e.g., nut-, oat- or soy-based milk, ice cream, yogurt, cheese)					
		Multiple times a week	About once a week	About once a month	A few times a year	Multiple times a week	About once a week	About once a month	A few times a year	Almost never	Never
Gender	Men	71.9%	16.9%	8.3%	3.0%	28.5%	22.0%	13.8%	6.5%	7.3%	21.9%
	Women	72.7%	17.3%	7.2%	2.8%	26.9%	20.3%	12.9%	6.2%	10.0%	23.7%
Age	18-34 years old [A]	66.8% ↓	19.3%	8.8% ↑	5.1% ↑	34.1% ↑	28.1% ↑	16.3% ↑	8.5% ↑	5.4% ↓	7.6% ↓
	35-54 years old [B]	72.9%	17.3%	8.5% ↑	1.3% ↓	31.0% ↑	19.4% ↓	14.0% ↑	5.8%	8.3% ↓	21.5% ↑
	55+ years old [C]	79.8% ↑	13.3%	3.9% ↓	3.0%	9.9% ↓	14.8% ↓	6.9% ↓	3.9% ↓	14.3% ↑	50.2% ↑
Education	Non-college	69.2%	19.9%	7.5%	3.5%	24.6%	18.4%	13.9%	7.2%	7.5%	28.4% ↑
	College	74.3%	15.4%	7.8%	2.5%	29.9%	23.2%	12.9%	5.7%	9.3%	19.0% ↓

- There were no significant gender differences for frequency of consuming dairy or plant-based non-dairy alternatives
- There are multiple significant differences between age. Focusing on the high-frequency consumption, a statistically significantly higher proportion of respondents 55+ years old than respondents between 18-34 years old consume dairy foods/beverages multiple times a week; a statistically significantly higher proportion of respondents between 18-34 and 35-54 years old than respondents 55+ years old consume plant-based non-dairy alternatives multiple times a week
- A statistically significantly higher proportion of respondents with no college degree indicated that they *never* choose the plant-based non-dairy alternatives

SIGNIFICANCE

 Red "down arrow" indicates statistically significantly lower than variable with green "up arrow" in same demographic category
 (green arrow next to a value for men indicates that value is significantly higher than women, for example)

Q2: Please select which types (dairy and/or plant-based) of the following foods and beverages you have consumed in the past six months

		Milk				Cheese				Yogurt				Yogurt-based drinks and smoothies				Butter				Ice Cream			
		I always choose the dairy version	I sometimes choose both*	I always choose the plant-based (non-dairy) alternative	I have not consumed this food within the past six months	I always choose the dairy version	I sometimes choose both*	I always choose the plant-based (non-dairy) alternative	I have not consumed this food within the past six months	I always choose the dairy version	I sometimes choose both*	I always choose the plant-based (non-dairy) alternative	I have not consumed this food within the past six months	I always choose the dairy version	I sometimes choose both*	I always choose the plant-based (non-dairy) alternative	I have not consumed this food within the past six months	I always choose the dairy version	I sometimes choose both*	I always choose the plant-based (non-dairy) alternative	I have not consumed this food within the past six months	I always choose the dairy version	I sometimes choose both*	I always choose the plant-based (non-dairy) alternative	I have not consumed this food within the past six months
Gender	Men	66.3%	22.8%	7.5%	3.3%	71.5%	21.9%	4.9%	1.8%	59.4%	22.6%	8.5%	9.4%	45.9%	25.2%	7.5%	21.5%	65.7%	22.6%	7.9%	3.7%	65.0%	25.0%	5.5%	4.5%
	Women	61.0%	28.9%	8.0%	2.2%	76.3%	18.7%	4.0%	1.0%	63.7%	21.7%	6.0%	8.6%	44.4%	28.7%	5.0%	21.9%	70.3%	22.7%	4.4%	2.6%	66.1%	26.5%	4.4%	3.0%
Age	18-34 years old [A]	51.7%	36.6%	10.3%	1.5%	59.8%	31.1%	7.6%	1.5%	53.2%	29.3%	14.5%	3.0%	45.0%	38.4%	10.3%	6.3%	52.9%	34.1%	10.6%	2.4%	50.5%	38.4%	8.5%	2.7%
	35-54 years old [B]	66.7%	23.8%	7.3%	2.3%	76.9%	18.5%	3.8%	0.8%	63.5%	23.8%	4.4%	8.3%	48.5%	27.3%	5.6%	18.5%	69.8%	22.3%	4.4%	3.5%	69.0%	24.4%	3.8%	2.9%
	55+ years old [C]	75.4%	14.3%	4.4%	5.9%	89.7%	6.9%	1.0%	2.5%	70.4%	7.4%	2.0%	20.2%	37.4%	7.9%	1.0%	53.7%	88.2%	4.9%	3.4%	3.4%	82.3%	8.4%	2.0%	7.4%
Education	Non-college	62.9%	26.9%	8.2%	2.0%	74.1%	18.9%	5.7%	1.2%	59.5%	20.6%	9.0%	10.9%	43.0%	25.1%	8.5%	23.4%	67.7%	22.9%	6.7%	2.7%	66.9%	24.1%	5.0%	4.0%
	College	63.9%	25.5%	7.4%	3.3%	73.7%	21.2%	3.6%	1.5%	62.9%	23.4%	6.0%	7.7%	46.6%	28.3%	4.7%	20.4%	68.1%	22.5%	5.9%	3.4%	64.7%	26.8%	4.9%	3.6%

* Sometimes choose the dairy version and sometimes choose the plant-based (non-dairy) alternative

- A statistically significantly higher proportion of women than men choose *both dairy and plant-based non-dairy milk* options; a statistically significantly higher proportion of men than women choose *plant-based non-dairy butter*
- There are multiple significant differences between age. Focusing on dairy-only and plant-based-only options, generally older respondents choose dairy versions and younger respondents choose plant-based or both plant-based and dairy
 - A statistically significantly higher proportion of respondents 55+ years old than respondents between 18-34 years old and 35-54 years old choose *dairy milk, dairy cheese, dairy butter, and dairy ice cream*; a statistically significantly higher proportion of respondents 35-54 years old and 55+ years old than 18-34 years old consume *dairy yogurt*;
 - A statistically significantly higher proportion of respondents 35-54 years old than 55+ years old consume *dairy yogurt-based drinks and smoothies*;
 - A statistically significantly higher proportion of respondents between 18-34 years old and 35-54 years old than 55+ consume *plant-based milk and plant-based yogurt-based drinks and smoothies*; a significantly higher proportion of respondents between 18-34 years old than 35-54 years old and 55+ consume *plant-based cheese, plant-based yogurt, plant-based butter, and plant-based ice cream*.
- A statistically significantly higher proportion of respondents with no college degree indicated that they choose *plant-based non-dairy yogurt-based drinks and smoothies*

Q3: When shopping for dairy-based yogurt, what types of claims (if any) do you seek out? (sorted based on overall frequency)

		Natural	Low fat	Whole milk	Low/ Reduced Sugar	Organic	High protein content	Contains Probiotics	High in Calcium	Non-fat	Non-GMO	Contains Live and Active Cultures	Hormone/ rBST free	Animal welfare approved	Other	None of the above
Gender	Men	24.0%	19.1%	14.8%↓	16.7%	16.1%	17.7%↑	13.6%	13.8%	11.4%	8.9%	8.9%	6.7%	5.1%	0.4%	11.4%
	Women	20.9%	21.5%	21.5%↑	18.3%	14.1%	12.2%↓	12.5%	12.2%	11.2%	10.0%	7.6%	6.8%	4.8%	0.6%	12.9%
Age	18-34 years old	21.1%	17.8%↓	20.8%↑	17.8%	16.9%↑	17.2%↑	14.8%	13.9%	11.5%	13.6%↑	6.9%	7.6%↑	5.1%	0.3%	7.3%↓
	35-54 years old	25.6%↑	19.8%	17.9%	17.1%	17.9%↑	15.4%	13.3%	11.7%	9.6%↓	8.1%↓	9.2%	7.9%↑	5.4%	0.6%	10.2%↓
	55+ years old	17.7%↓	25.1%↑	13.8%↓	17.7%	5.9%↓	10.8%↓	9.4%	14.3%	15.3%↑	5.4%↓	7.9%	2.5%↓	3.4%	0.5%	25.1%↑
Education	Non-college	22.9%	18.4%	21.4%↑	13.2%↓	14.4%	15.4%	12.9%	11.9%	11.9%	8.7%	6.2%	6.7%	4.0%	1.0%	15.4%↑
	College	22.4%	21.4%	15.8%↓	20.3%↑	15.7%	14.9%	13.1%	13.6%	10.9%	9.8%	9.5%	6.7%	5.6%	0.2%	10.1%↓

- A statistically significantly higher proportion of women than men seek out *whole milk* claims; a statistically significantly higher proportion of men than women seek out *high protein content* claims
- Generally, older respondents aren't looking for specific claims or seek out low- or non-fat claims and younger respondents are looking for natural, organic, hormone-free
 - A significantly higher proportion of respondents between 18-34 years old than 55+ years old seek out *whole milk* and *high protein content* claims; a significantly higher proportion of respondents between 18-34 years old and 35-54 years old than 55+ years old seek out *organic* and *hormone/rBST free* claims; a significantly higher proportion of respondents between 18-34 years old than 35-54 and 55+ years old seek out *non-GMO* claims
 - A statistically significantly higher proportion of respondents between 35-54 years old than 55+ seek out *natural* claims;
 - A significantly higher proportion of respondents 55+ years old than 18-34 years old seek out *low fat* claims; a significantly higher proportion of respondents who are 55+ years old than 35-54 years old seek out *non-fat* claims; a significantly higher proportion of respondents who are 55+ years old than 18-34 or 35-54 years old seek out *none* of the listed claim options
- A statistically significantly higher proportion of respondents with no college degree seek out *whole milk* claims or *none* of the listed claim options; a statistically significantly higher proportion of respondents with a college degree seek out *low/reduced sugar* claims

Q4: When shopping for plant-based yogurt what types of claims (if any) do you seek out? (sorted based on overall frequency)

		Natural	High protein content	Organic	Low/ Reduced Sugar	High in Calcium	Contains Probiotics	Plant-Based	Dairy-free	Non-GMO	Contains Live and Active Cultures	Lactose-free	Un-sweetened	Vegan	Other	None of the above
Gender	Men	20.9%	17.5%	18.5%↑	12.6%	13.8%	10.0%	12.2%↑	10.6%	9.3%	6.5%	6.7%	7.1%	5.1%	0.4%	24.4%
	Women	21.1%	16.3%	13.3%↓	15.9%	12.9%	12.9%	7.8%↓	8.0%	9.0%	8.0%	6.6%	5.6%	3.8%	0.2%	29.3%
Age	18-34 years old [A]	24.8%↑	18.1%↑	19.9%↑	15.1%	16.3%↑	12.1%	15.1%↑	13.6%↑	13.0%↑	5.7%	9.7%↑	6.3%	8.2%↑	0.3%	10.9%↓
	35-54 years old [B]	22.3%↑	19.4%↑	17.5%↑	14.0%	13.1%	12.7%↑	9.2%↔	7.7%↓	8.1%↓	9.2%	6.3%	6.9%	3.3%↓	0.4%	25.0%↔
	55+ years old [C]	12.8%↓	9.4%↓	5.9%↓	13.3%	8.9%↓	7.4%↓	3.4%↓	5.9%↓	4.9%↓	4.9%	3.0%↓	4.9%	1.0%↓	0.0%	57.1%↑
Education	Non-college	21.4%	15.9%	14.7%	11.7%	14.7%	11.2%	9.2%	9.2%	10.0%	6.2%	7.5%	3.7%↓	4.0%	0.5%	30.1%
	College	21.1%	17.6%	16.8%	15.8%	12.4%	11.6%	10.5%	9.3%	8.5%	7.8%	6.2%	8.0%↑	4.7%	0.2%	24.7%

- A statistically significantly higher proportion of men than women seek out *organic* and *plant-based* claims
- Generally, younger respondents are looking for natural, high protein, organic, among others and older respondents aren't looking for specific claims
 - A significantly higher proportion of respondents between 18-34 years old and 35-54 years old than 55+ years old seek out *natural*, *high protein content*, and *organic* claims; a significantly higher proportion of respondents between 18-34 years old than 55+ years old seek out *high calcium* and *lactose-free* claims; a significantly higher proportion of respondents between 18-34 years old than 35-54 and 55+ years old seek out *plant-based*, *dairy-free*, *non-GMO*, and *vegan* claims
 - A statistically significantly higher proportion of respondents between 35-54 years old than 55+ seek out *contains probiotics* and *plant-based* claims; a significantly higher proportion of respondents between 35-54 years old than 18-34 years old seek out *none* of the listed claim options
 - A significantly higher proportion of respondents who are 55+ years old than 18-34 or 35-54 years old seek out *none* of the listed claim options
- A statistically significantly higher proportion of respondents with no college degree seek out *unsweetened* claims

Q5: When shopping for yogurt or yogurt-based drinks, please select the following aspects in order of importance. (#1 rank, sorted based on overall frequency)

		Nutrition Facts Panel	The list of ingredients	The brand of the food or beverage	Claims, symbols or statements made on the front of the package	I never look at any of these aspects
Gender	Men	25.9%	22.2%	23.1%	11.0%	17.7%
	Women	24.3%	24.9%	22.6%	10.3%	17.8%
Age	18-34 years old	26.7% ↑	23.0%	24.2%	12.6% ↑	13.5% ↓
	35-54 years old	26.6% ↑	23.9%	22.8%	12.2% ↑	14.4% ↓
	55+ years old	17.8% ↓	23.3%	19.6%	2.5% ↓	36.8% ↑
Education	Non-college	19.7% ↓	24.4%	23.9%	9.7%	22.2% ↑
	College	28.5% ↑	22.9%	22.0%	11.2%	15.4% ↓
Yogurt and/or yogurt-based drinks/smoothie preference (past 6-month consumption)	Dairy-only	22.2% ↓	21.8%	24.9%	6.5% ↓	24.7% ↑
	Plant-based*	28.9% ↑	25.7%	20.0%	16.0% ↑	9.4% ↓

* includes respondents who eat only plant-based non-dairy alternatives as well as both dairy and plant-based non-dairy alternatives

- There were no significant differences between men and women with their #1 ranked label component
- A statistically significantly higher proportion of respondents between 18-34 years old and 35-54 years old than 55+ years old gave a #1 rank for *nutrition facts panel* and *claims, symbols, or statements made on the front of the package*; a statistically significantly higher proportion of respondents 55+ years old than respondents between 18-34 years old and 35-54 years old indicated that they *never look* at the label options listed
- A statistically significantly higher proportion of respondents with a college degree gave a #1 rank for *nutrition facts panel*; a significantly higher proportion of respondents with no college degree indicated that they *never look* at the label options listed
- A statistically significantly higher proportion of respondents who consume plant-based non-dairy alternatives than dairy-only yogurt consumers gave a #1 ranking for *nutrition facts panel* and *claims, symbols, or statements made on the front of the package*; a significantly higher proportion of dairy-only yogurt consumers indicated that they *never look* at the label options listed

Q6: You indicated that you have consumed yogurt (dairy or plant-based) within the past six months. Please select your top three reasons for consuming yogurt. (sorted based on overall frequency)

		Taste	Health benefits/ Healthier option	Nutritional value	Price	Probiotics	Convenience	Satisfies my hunger longer than other foods	Live and Active Cultures	Familiarity	Versatility	Aligns with dietary restrictions	Other	None of these
Gender	Men	46.9%	34.3%↓	38.9%	31.7%↑	25.5%↓	24.0%	21.2%	16.6%	19.4%↑	12.7%	11.9%	0.6%	5.4%
	Women	49.0%	42.4%↑	35.7%	25.6%↓	31.4%↑	19.8%	20.6%	19.4%	13.8%↓	9.9%	9.2%	1.3%	7.3%
Age	18-34 years old	42.9%↓	34.7%	33.1%	35.3%↑	25.2%↓	24.5%	21.2%	16.3%	21.2%↑	16.0%↑	12.6%↑	0.6%	5.5%
	35-54 years old	48.8%	41.5%	38.8%	23.5%↓	33.0%↑	19.6%	21.4%	19.2%	13.5%↓	9.9%↓	11.1%↑	1.4%	6.1%
	55+ years old	56.4%↑	36.8%	40.5%	30.1%	22.1%↓	23.3%	19.0%	17.8%	15.3%	5.5%↓	4.9%↓	0.6%	9.2%
Education	Non-college	50.0%	33.3%↓	31.1%↓	32.2%	26.9%	23.1%	22.5%	14.4%↓	15.0%	9.2%	11.1%	1.9%↑	9.7%↑
	College	46.9%	41.4%↑	40.9%↑	26.6%	29.2%	21.3%	19.9%	20.1%↑	17.5%	12.6%	10.1%	0.3%↓	4.4%↓
Yogurt and/or yogurt-based drinks/ smoothie preference (past 6-month consumption)	Dairy-only	52.0%↑	38.3%	37.4%	31.1%	27.3%	22.8%	17.8%↓	16.3%	15.9%	8.0%↓	7.4%↓	1.1%	8.2%↑
	Plant-based*	43.0%↓	38.3%	36.8%	25.7%	29.6%	21.0%	24.9%↑	20.0%	17.3%	15.6%↑	14.6%↑	0.7%	4.2%↓

* includes respondents who eat only plant-based non-dairy alternatives as well as both dairy and plant-based non-dairy alternatives

- A statistically significantly higher proportion of women than men consume yogurt for *health benefits* and *probiotics*; a significantly higher proportion of men than women consume yogurt because of *price* and *familiarity*
- A statistically significantly higher proportion of respondents 55+ years old than 18-34 years old consume yogurt because of *taste*; a statistically significantly higher proportion of respondents between 18-34 years old than 35-54 years old consume yogurt because of *price* and *familiarity*; a significantly higher proportion of respondents between 35-54 years old than 18-34 and 55+ years old consume yogurt because of *probiotics*; a significantly higher proportion of respondents between 18-34 years old than 35-54 and 55+ years old consume yogurt because of *versatility*; a significantly higher proportion of respondents between 18-34 years old and 35-54 years old than 55+ years old consume yogurt because it *aligns with dietary restrictions*
- A statistically significantly higher proportion of respondents with a college degree consume yogurt because of *health* benefits, *nutritional* value, and *live and active cultures*; a significantly higher proportion of respondents with no college degree indicated that they consume yogurt for *other* reasons or *none* of the listed reasons
- A statistically significantly higher proportion of respondents who consume dairy-only yogurt than plant-based non-dairy alternatives consume yogurt because of *taste* or *none* of the listed reasons; a significantly higher proportion of plant-based yogurt consumers than dairy-only consume yogurt because it *satisfied my hunger longer than other foods*, *versatility*, and *aligns with dietary restrictions*

Q7: When eating yogurt (dairy or plant-based), you indicated that “Nutritional value” is among your top reasons for consuming yogurt. What about yogurt’s nutritional value is important to you? (sorted based on overall frequency)

		Protein content	Calcium content	Vitamin D content	Calorie content	Fat content	Total sugar content	Fiber content	Carbohydrate content	Added sugar content	Other	None of these
Gender	Men	38.9%	26.1%	30.0%	22.8%	27.2% ↑	17.8%	12.8%	11.7%	8.9%	0.6%	1.7% ↓
	Women	39.8%	35.5%	23.5%	26.5%	9.6% ↓	17.5%	19.3%	7.8%	6.6%	0.6%	6.6% ↑
Age	18-34 years old	37.0%	21.3% ↓	30.6%	27.8%	17.6%	13.9%	21.3% ↑	9.3%	7.4%	0.9%	6.5%
	35-54 years old	40.1%	30.8% ↓	26.7%	22.7%	19.8%	19.2%	15.7%	11.0%	8.7%	0.6%	2.3%
	55+ years old	40.9%	45.5% ↑	21.2%	24.2%	18.2%	19.7%	7.6% ↓	7.6%	6.1%	0.0%	4.5%
Education	Non-college	32.1%	34.8%	32.1%	22.3%	18.8%	14.3%	17.0%	8.0%	7.1%	0.9%	6.3%
	College	42.7%	28.6%	24.4%	25.6%	18.8%	19.2%	15.4%	10.7%	8.1%	0.4%	3.0%
Yogurt and/or yogurt-based drinks/ smoothie preference (past 6-month consumption)	Dairy-only	42.1%	32.5%	24.4%	26.4%	19.8%	16.2%	13.2%	7.6%	7.1%	0.5%	5.1%
	Plant-based*	35.6%	28.2%	30.2%	22.1%	17.4%	19.5%	19.5%	12.8%	8.7%	0.7%	2.7%

* includes respondents who eat only plant-based non-dairy alternatives as well as both dairy and plant-based non-dairy alternatives

- A statistically significantly higher proportion of men than women indicated that *fat content* is important to them; a significantly higher proportion of women than men indicated that *none* of the listed nutritional components are important to them
- A statistically significantly higher proportion of respondents 55+ years old than respondents between 18-34 years old and 35-54 years old indicated that *calcium content* is important to them; a significantly higher proportion of respondents between 18-34 years old than 55+ years old indicated that *fiber content* is important to them
- There were no significant differences among levels of education or dairy-only/plant-based yogurt consumption

Q8: When eating yogurt (dairy or plant-based), you indicated that “Health benefits/Healthier option” is among your top reasons for consuming yogurt. What health benefits are you seeking from yogurt? (sorted based on overall frequency)

		General health and wellness	Digestive/gut health	Weight loss/weight management	Bone health/osteoporosis prevention	Muscle health/strength	Heart/cardiovascular health	Management of lactose intolerance	Other	None of these
Gender	Men	66.0%	61.6%	48.4%	32.1% ↓	34.0%	32.1% ↑	18.9%	1.3%	1.9%
	Women	73.1%	59.4%	48.2%	50.8% ↑	25.9%	20.3% ↓	14.7%	1.5%	2.0%
Age	18-34 years old	64.6%	60.2%	51.3%	31.0% ↓	42.5% ↑	20.4%	23.0% ↑	1.8%	1.8%
	35-54 years old	71.7%	59.2%	48.4%	47.3% ↑	25.5% ↓	27.2%	14.7%	1.1%	1.6%
	55+ years old	75.0%	63.3%	41.7%	50.0% ↑	18.3% ↓	30.0%	10.0% ↓	1.7%	3.3%
Education	Non-college	70.0%	57.5%	50.8%	41.7%	34.2%	22.5%	14.2%	1.7%	2.5%
	College	70.0%	61.6%	46.8%	43.0%	27.4%	27.0%	17.7%	1.3%	1.7%
Yogurt and/or yogurt-based drinks/ smoothie preference (past 6-month consumption)	Dairy-only	73.3%	62.9%	52.0%	43.6%	24.8% ↓	24.3%	9.4% ↓	2.5%	2.5%
	Plant-based*	65.8%	56.8%	43.2%	41.3%	36.1% ↑	27.1%	25.8% ↑	0.0%	1.3%

* includes respondents who eat only plant-based non-dairy alternatives as well as both dairy and plant-based non-dairy alternatives

- A statistically significantly higher proportion of women than men indicated that *bone health/osteoporosis prevention* is an important health benefit to them from consuming yogurt; a significantly higher proportion of men than women indicated that *heart/cardiovascular health* is an important health benefit to them
- A statistically significantly higher proportion of respondents between 35-54 years old and 55+ years old than respondents between 18-34 years old indicated that *bone health/osteoporosis prevention* is an important health benefit to them; a significantly higher proportion of respondents between 18-34 years old than 35-54 years old and 55+ indicated that *muscle health/strength* is an important health benefit to them; a significantly higher proportion of respondents between 18-34 years old than 55+ years old indicated that *management of lactose intolerance* is an important health benefit to them
- There were no significant differences among levels of education
- A statistically significantly higher proportion of plant-based yogurt consumers than dairy-only yogurt consumers indicated that *muscle health/strength* and *management of lactose intolerance* are important health benefits to them

Q10: The phrases “Contains live and active cultures” and “Probiotics” are sometimes found on food and beverage packages, including some yogurts. Which of these statements best describes your familiarity and interest with these terms?

		Probiotics				Contains Live and Active Cultures			
		I am very familiar with it and know a lot about it	I have heard of it but don't know much about it	I have not heard of it but I would like to learn more	I have not heard of it and I am not interested in learning more	I am very familiar with it and know a lot about it	I have heard of it but don't know much about it	I have not heard of it but I would like to learn more	I have not heard of it and I am not interested in learning more
Gender	Men	50.8%	37.2%	5.7%	6.3%	37.6%	40.6% ↓	14.0%	7.9%
	Women	46.4%	41.8%	7.0%	4.8%	31.9%	49.0% ↑	12.9%	6.2%
Age	18-34 years old	50.5% ↑	38.1% ↓	9.4% ↑	2.1% ↓	33.8% ↑	41.1% ↓	21.1% ↑	3.9% ↓
	35-54 years old	54.8% ↑	35.4% ↓	5.8%	4.0% ↓	40.2% ↑	43.8% ↓	11.0% ↓	5.0% ↓
	55+ years old	31.0% ↓	51.2% ↑	3.0% ↓	14.8% ↑	22.7% ↓	53.7% ↑	6.9% ↓	16.7% ↑
Education	Non-college	45.5%	40.5%	8.0%	6.0%	27.9% ↓	45.3%	18.2% ↑	8.7%
	College	50.7%	38.7%	5.4%	5.2%	39.1% ↑	44.6%	10.5% ↓	5.9%
Yogurt and/or yogurt-based drinks/smoothie preference (past 6-month consumption)	Dairy-only	46.1% ↓	42.7% ↑	5.3%	5.9% ↑	34.3%	47.1%	11.2% ↓	7.4% ↑
	Plant-based*	57.0% ↑	33.6% ↓	8.1%	1.2% ↓	39.3%	42.7%	16.0% ↑	2.0% ↓

* includes respondents who eat only plant-based non-dairy alternatives as well as both dairy and plant-based non-dairy alternatives

- A statistically significantly higher proportion of women than men have heard of live and active cultures but don't know much about it
- Younger respondents are familiar with and knowledgeable of probiotics and live and active cultures while older respondents have heard of but don't know much about probiotics or live and active cultures (and aren't interested in learning more if they haven't heard of them)
 - A statistically significantly higher proportion of respondents between 18-34 years old and 35-54 years old than 55+ years old are very familiar with and know a lot about probiotics and live and active cultures; a significantly higher proportion of respondents between 18-34 years old than 55+ years old have heard of probiotics but would like to learn more; a significantly higher proportion of respondents between 18-34 years old than 35-54 years old and 55+ years old have heard of live and active cultures but would like to learn more
 - A statistically significantly higher proportion of respondents 55+ years old than 18-34 and 35-54 years old have heard of but don't know much about probiotics or live and active cultures, and have not heard of and not interested in learning more about probiotics or live and active cultures
- A statistically significantly higher proportion of respondents with a college degree were very familiar with and know a lot about live and active cultures; a significantly higher proportion of respondents with no college degree have not heard of live and active cultures but would like to learn more
- A statistically significantly higher proportion of plant-based yogurt consumers than dairy-only yogurt consumers are very familiar with and know a lot about probiotics and have not heard of live and active cultures but would like to learn more; a significantly higher proportion of dairy-only yogurt consumers than plant-based have heard of probiotics but don't know much about it, have not heard of probiotics and are not interested in learning more, and have not heard of live and active cultures and are not interested in learning more

Q11: If at least heard of “contains live and active cultures”

		Q11 You mentioned that you have heard of the phrase, “Contains Live and Active Cultures.” Please select the statement you most agree with:			
		This phrase indicates a product is better for me	This phrase indicates a product is not as good for me	This phrase does not indicate whether the product is better for me	Not sure
Gender	Men	69.0%	11.8%	10.6%	8.6% ↓
	Women	65.0%	11.8%	8.1%	15.0% ↑
Age	18-34 years old [A]	58.5% ↓	19.8% ↑	10.1%	11.7% ↓
	35-54 years old [B]	71.5% ↑	9.9% CA ↓	9.2%	9.4% ↓
	55+ years old [C]	67.7%	3.9% ↓	8.4%	20.0% ↑
Education	Non-college	58.8% ↓	12.2%	11.9%	17.0% ↑
	College	71.3% ↑	11.5%	7.8%	9.4% ↓
Yogurt and/or yogurt-based drinks/smoothie preference (past 6-month consumption)	Dairy-only	69.7%	6.5% ↓	10.3%	13.5% ↑
	Plant-based*	66.0%	19.6% ↑	7.5%	6.9% ↓

* includes respondents who eat only plant-based non-dairy alternatives as well as both dairy and plant-based non-dairy alternatives

- A statistically significantly higher proportion of women than men are *unsure* if live and active cultures are better or not as good for them
- Younger respondents are mixed about the health benefits of live and active cultures, while older respondents aren't sure if live and active cultures are better or not as good for them
- A statistically significantly higher proportion of respondents between 18- 34 years old than 35-54 and 55+ years old believe that live and active cultures *indicate a product is not as good for me*
- A statistically significantly higher proportion of respondents between 35-54 years old than 18-34 years old believe that live and active cultures *indicate a product is better for them*; a significantly higher proportion of respondents between 35-54 years old than 55+ years old believe that live and active cultures *indicate a product is not as good for me*
 - A statistically significantly higher proportion of respondents who are 55+ years old than 18-34 and 35-54 years old are *unsure* if live and active cultures are better or not as good for them
- A statistically significantly higher proportion of respondents with a college degree indicated that live and active cultures *indicates a product is better for me*; a significantly higher proportion of respondents with no college degree are *unsure* if live and active cultures are better or not as good for them
- A statistically significantly higher proportion of plant-based yogurt consumers than dairy-only yogurt consumers indicated that live and active cultures *indicates a product is not as good for me*; a significantly higher proportion of dairy-only yogurt consumers than plant-based are *unsure* if live and active cultures are better or not as good for them

Q15: When thinking about labels and symbols found on food and beverage packaging, to what degree would you trust labels and symbols that were verified by each of the following?

		Government agency (e.g., USDA, FDA)				Third-party/ independent organization				The company that produced/ manufactured the food				Retailer (e.g., grocery store)			
		Low level of trust	Moderate level of trust	High level of trust	Don't know/Not sure	Low level of trust	Moderate level of trust	High level of trust	Don't know/Not sure	Low level of trust	Moderate level of trust	High level of trust	Don't know/Not sure	Low level of trust	Moderate level of trust	High level of trust	Don't know/Not sure
Gender	Men	19.7%	33.3%↓	42.7%↑	4.3%	23.4%	45.7%	23.0%↑	7.9%↓	20.3%	45.1%	28.5%↑	6.1%	20.1%	47.6%	25.4%	6.9%↓
	Women	16.7%	39.6%↑	36.7%↓	7.0%	25.7%	46.2%	16.1%↓	12.0%↑	20.3%	47.6%	23.1%↓	9.0%	18.7%	47.0%	23.7%	10.6%↑
Age	18-34 years old	22.1%↑	36.6%	37.5%	3.9%↓	25.4%	50.8%↑	17.5%↓	6.3%↓	18.1%	47.1%	26.0%	8.8%	19.0%	45.3%	27.5%↑	8.2%
	35-54 years old	19.2%↑	36.3%	39.0%	5.6%	23.1%	44.2%	23.5%↑	9.2%↓	22.5%	43.1%↓	28.5%↑	5.8%	19.8%	47.3%	24.8%	8.1%
	55+ years old	10.3%↓	36.9%	44.3%	8.4%↑	27.6%	41.9%↓	13.3%↓	17.2%↑	19.7%	51.7%↑	19.2%↓	9.4%	20.2%	50.2%	18.7%↓	10.8%
Education	Non-college	21.4%↑	37.6%	32.8%↓	8.2%↑	29.9%↑	40.8%↓	15.2%↓	14.2%↑	22.1%	45.3%	22.6%	10.0%↑	23.1%↑	43.3%↓	23.1%	10.4%
	College	16.3%↓	35.8%	44.0%↑	3.9%↓	21.4%↓	49.2%↑	22.4%↑	7.0%↓	19.4%	46.7%	27.9%	5.9%↓	17.3%↓	49.8%↑	25.3%	7.5%
Yogurt and/or yogurt-based drinks/ smoothie preference (past 6-month consumption)	Dairy-only	15.0%↓	37.2%	41.6%	6.3%	26.0%↑	45.0%	18.0%↓	11.0%↑	21.4%	44.4%	25.6%	8.5%↑	20.7%	44.6%	24.7%	10.1%↑
	Plant-based*	23.7%↑	35.3%	36.8%	4.2%	20.5%↓	49.4%	23.7%↑	6.4%↓	18.0%	47.4%	29.4%	5.2%↓	16.8%	50.9%	26.7%	5.7%↓

* includes respondents who eat only plant-based non-dairy alternatives as well as both dairy and plant-based non-dairy alternatives

- A statistically significantly higher proportion of women than men have a *moderate level of trust* with claims verified by *government agencies*; a significantly higher proportion of men than women have a *high level of trust* with claims verified by *government agencies*, *third-party organizations*, and *manufacturers*
- A statistically significantly higher proportion of respondents between 18-34 years old and 35-54 years old than 55+ years old have a *low level of trust* with claims verified by *government agencies*; a significantly higher proportion of respondents between 18-34 years old than 55+ years old have a *moderate level of trust* with claims verified by *third-party organizations* and a *high level of trust* with claims verified by *retailers*; a significantly higher proportion of respondents between 35-54 years old than 18-34 and 55+ have a *high level of trust* with claims verified by *third-party organizations*; a significantly higher proportion of respondents between 35-54 years old than 55+ years old have a *high level of trust* with claims verified by *manufacturers*
- A statistically significantly higher proportion of respondents with no college degree have a *low level of trust* with claims verified by *government agencies*, *third-party organizations*, and *retailers*; a significantly higher proportion of respondents with a college degree have a *high level of trust* with claims verified by *government agencies* and *third-party organizations* and *moderate level of trust* with claims verified by *third-party organizations* and *retailers*
- A statistically significantly higher proportion of plant-based yogurt consumers than dairy-only yogurt consumers have a *low level of trust* with claims verified by *government agencies* and *high level of trust* with claims verified by *third-party organizations*; a significantly higher proportion of dairy-only yogurt consumers than plant-based yogurt consumers have a *low level of trust* with claims verified by *third-party organizations*