

**A Market Analysis to Identify Promotional
Opportunities for the Massachusetts Dairy Industry**



Presented By:

The University of Massachusetts Dartmouth
Center for Marketing Research

Directed By:

Dr. Nora Ganim Barnes
Director, Center for Marketing Research

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Executive Summary

The Center for Marketing Research at the University of Massachusetts Dartmouth conducted a study of consumers and the opportunities they might provide for the dairy industry. In collaboration with the Massachusetts Dairy Promotion Board, a survey was developed and administered to 391 consumers throughout Massachusetts. The result was a statistically valid study with an error level of $\pm 5\%$.

Respondents were first asked how often they purchase the following dairy products.

On a weekly basis:

- Eighty-three percent of respondents purchase milk on a weekly basis (two percent never purchase).
- Fifty-nine percent of respondents purchase cheese (three percent never purchase).
- Fifty percent of respondents purchase yogurt (twenty percent never purchase).
- Thirty-nine percent of respondents purchase butter or margarine on a weekly basis (three percent never purchase).
- Twenty-eight percent of respondents purchase cream (thirty-six percent never purchase).
- Twenty-six percent of respondents purchase ice cream on a weekly basis (eight percent never purchase).

The data shows the following statistics regarding the consumption of milk:

- Eighty-two percent of the respondents drink milk.
- Seventy-four percent of people buy the milk for themselves or their households. Of those, fifty-three percent normally purchase a gallon.
- Thirty-six percent of people purchase 1% milk on a weekly basis (fifty-five percent never purchase it).
- Twenty-four percent purchase skim milk on a weekly basis (seventy percent never purchase it).
- Twenty percent of people purchase 2% milk on a weekly basis (seventy-four percent never purchase it).
- Sixteen percent of people purchase whole milk on a weekly basis (seventy-five percent never purchase it).
- Five percent of people purchase lactose free milk on a weekly basis (ninety-two percent never purchase it).
- Three percent of people purchase flavored milk on a weekly basis (eight-five percent never purchase it).

Consumers purchase their milk in various places on a weekly basis. Findings show:

- Eighty-eight percent of consumers purchase milk from a supermarket.
- Twenty-seven percent of consumers purchase milk from a convenience store.
- Seventeen percent of consumers purchase milk from a food warehouse or superstore (such as BJ's or Costco).
- Six percent of consumers purchase milk from a local dairy or farm.
- One percent of consumers purchase milk from a cafeteria.

- One percent of consumers have their milk delivered to their home.

There are many factors that can influence a person's decision to purchase certain brands of milk. Findings show:

- Fifty-seven percent of people said the taste is very important when choosing milk.
- Fifty-six percent of people said that the health benefits are very important when choosing milk.
- Forty percent of shoppers said that cost is very important when choosing milk.
- Thirty-nine percent of shoppers said that calories are very important when choosing milk.
- Thirty-seven percent of people said buying local is very important when choosing milk.
- Thirty-five percent said that the brand is very important when choosing milk.
- Twenty-nine percent of respondents feel that environmentally friendly packaging is very important when choosing milk.
- Twenty-six percent of people said that Massachusetts produced is very important when choosing milk.
- Ten percent of people said organic is very important when choosing milk.
- Four percent of people said the attractiveness of the bottle is very important when choosing milk.
- Four percent of people said the variety of flavors is very important when choosing milk.

Consumer definition of what it means to buy local:

- Forty-nine percent think that it includes all of New England.
- Twenty-two percent think it includes their county.
- Seventeen percent agree that it includes the state of Massachusetts.
- Twelve percent believe it includes their city/town.

The next set of questions asked consumers about purchasing milk from a local farmer and their attitude toward land preservation. Findings show:

- Ninety-two percent of people agree that dairy farmers help preserve open space.
- Forty-two percent of people said they would be very likely to purchase milk assuming it was readily available from a local farmer.
- Forty-six percent of people said they would definitely pay more for milk if they knew the additional money was going directly to the dairy farmer.
- Twenty-eight percent of people said they would definitely pay more for milk from a local farmer.
- Twenty-two percent of people said having milk from a local dairy delivered to their home is very appealing.
- Sixty-nine percent of people said sales/discounts would motivate them to buy local milk.
- Sixty-six percent of people said coupons would motivate them to buy local milk.
- Forty-three percent of people said free samples would motivate them to buy local milk.

- Twenty-two percent of people said advertisements would motivate them to buy local milk.
- Twelve percent of people said the packaging would motivate them to purchase local milk.

Consumer awareness of health benefits associated with dairy is varied. Findings show:

- Thirty-four percent of people said they are very health conscious.
- Ninety percent of people said they are very aware of calcium for bone health in adults.
- Sixty-nine percent of people are very aware that calcium prevents fractures in children.
- Forty-five percent of people are very aware that calcium/dairy can help with weight management.
- Nineteen percent of people are very aware of lower rates of high blood pressure.
- Seventeen percent of people said they are very aware of nonfat milk reduces the incidence of prostate cancer.
- Fourteen percent of people are very aware of lower colon cancer risk.

Consumers get their health and nutritional information from many different sources. Our findings show:

- Sixty-one percent of people get it from a physician's office (Thirty-four percent of people said that their doctor recommended the consumption of milk for health benefits).
- Thirty-eight percent of people get it from the internet
- Thirty-five percent of people get it from nutrition labels
- Thirty-three percent of people get it from the television
- Thirty percent of people get it from magazines
- Twenty-nine percent of people get it from the newspaper
- Twenty-eight percent of people get health and nutritional information from family and friends
- Fifteen percent of people get it from a pharmacy
- Ten percent of people get it from the radio
- Eight percent of people get it from their gym or fitness center
- Five percent of people get it from health food stores
- Three percent of people do not look for health and nutritional information at all.

Industry Profile

Dairy is the top agricultural business in California, Wisconsin, New York, Pennsylvania, Idaho, Michigan, New Mexico, Vermont, and Maine. In California alone, dairy is a \$31 billion industry that employs more than 400,000 people.¹ Ninety-nine percent of dairy farms in the United States are family owned and operated with an average herd of 135 cows. The top dairies in the United States are Dean, HP Hood, Prairie Farms, Nestlé USA, National Dairy Holdings, and Groupe Dannon. However, these top producers only accounted for 26% of the market in 2008.² Private-label milk retailers are becoming the more popular choice among consumers today. Retailers such as, Wal-Mart, Target, Kroger, Publix, and Meijer have launched their own private-label hormone-free milk. Private-label milk has been able to garner about 60% of the market share by selling their milk at 25% lower price than brand name milk. The average cost of brand name milk is about \$4.47 a gallon where, private-labels are about \$3.58 a gallon.¹

The dairy industry has not been doing well in the past few years. In May of 2007 a “State of Emergency” was declared by the acting Commissioner of the Massachusetts Department of Agricultural Resources. Under this emergency \$3.6 million was pledged to aid dairy farmers, and a Dairy Revitalization Task Force was developed to strengthen the dairy industry. This task force consisted of seventeen members including three dairy farmers, six legislators, a representative of milk processors, and seven members of the Executive Branch.³

Low-fat, skim, and whole milk have all showed a decrease in sales volume due to the increasing prices while flavored milk remains stagnant. Organic milk makes up only 1% of the market however, demand for it has been steadily increasing. Although demand

has been increasing, the high cost of organic milk keeps consumers from fully switching from non-organic milk. One major innovation that dairy processors have been moving towards is environmentally friendly packaging. Sam's company has recently launched a new square case-less packaging which requires no crates to transport the milk.

Consumers also noted that this new carton was easy to store, grip, and pour.¹

Dairy research has continued to show positive results in recent years especially in the area of weight management. However, even with the health benefits of calcium expanding and new information linking the consumption of nonfat milk to a lower incidence of prostate cancer and hypertension, the industry as a whole has seen a decrease in milk consumption. This could be due to increased competition from other dairy products and functional beverages. Milk's main competition comes from yogurt, which offers much of the same calcium and vitamin D benefits as milk along with the presence of live cultures and availability of different flavors. Soymilk has also seen growth due to the health benefits and flavor options available.¹

Massachusetts is home to 181 dairy farms which produce fresh milk, ice cream, yogurt, butter, and farmstead artisan cheeses. On average, each Massachusetts dairy farm milks 100 cows and produces about 232,000 gallons of milk annually. The steep decline in dairy farms is evidenced by the fact that there were 625 that were in business just over twenty-five years ago. Unfortunately, stagnant milk prices, coupled with increasing costs of production, transportation, and health care, have forced a number of family farms to close their doors after years of successful business. Of the 181 farms still operating in Massachusetts many have begun looking for new opportunities to remain economically viable. One way they have found to do this is by directly marketing to consumers around

them. There are currently fifteen local family farms who sell their own pasteurized milk and/or ice cream. Additionally, there are seventeen farms in Massachusetts which produce farmstead artisan cheeses and other dairy specialty products.

Dairy is the third largest agricultural business in Massachusetts, accounting for more than \$50 million in annual cash receipts that is then circulated throughout the state's rural economies. Massachusetts dairy farms provide much more than just milk to the state, they are the primary stewards of agricultural open space creating a "diverse working landscape for the recreational and scenic enjoyment of their neighbors and visiting tourists".

¹ Mintel. (2009, May). *Milk – US*. Retrieved from <http://academic.mintel.com/>.

² The U.S. Dairy Industry: *A Vital Contributor To Economic Development*. Retrieved from <http://www.dairyfarmingtoday.org/>.

Research Objective

RESEARCH OBJECTIVE:

To understand attitudes and behaviors of Massachusetts dairy consumers to identify promotional opportunities for the industry

The research goals aim to provide the following critical insights necessary to increase dairy consumption:

- ❖ To explore current perceptions of respondents
- ❖ To measure the consumption of dairy products
- ❖ To profile the ideal target market for dairy
- ❖ To reveal consumer knowledge of dairy industry
- ❖ To identify consumer interest in purchasing local dairy products

Methodology

RESEARCH DESIGN	Survey
RESEARCH METHOD	Telephone
SAMPLING DESIGN	Probability
SAMPLING METHOD	Systematic random sample through telephone books
SAMPLE POPULATION	Proportional sample of Massachusetts non-island residents age 18+ (N=5,033,481--US census)
DATA COLLECTION PERIOD	January – March 2010
SAMPLE SIZE (ERROR AT THE 95% CONFIDENCE LEVEL)	391 ($\pm 5\%$)

A Market Analysis to Identify Promotional Opportunities for the Massachusetts Dairy Industry

Conducted by the Center for Marketing Research at the University of Massachusetts Dartmouth

Part 1. Consumption of Dairy Products

1. How often do you buy the following dairy products?

	On A Weekly Basis	A Few Times a Month	Only Occasionally	Never Purchase
Cheese				
Yogurt				
Cream				
Butter/Margarine				
Ice Cream				
Milk				

2. How strongly do you agree or disagree with the following statement:

Dairy farmers help preserve open space.

Strongly Agree ___ Somewhat Agree ___ Somewhat Disagree ___ Strongly Disagree ___

3. When you hear the term 'buy local' how extensive a geographic area do you think that includes?

	Yes	No
Your City/Town		
County		
State of Massachusetts		
New England		

Other (please specify) _____

4. Do you drink milk?

Yes ___

No ___ Why not? _____

5. Are you the person who buys the milk for you or your household?

Yes ___

No ___ (go to question 17)

6. What brand of milk do you drink most often? _____

7. What size milk do you normally buy?

	What size?		How many per week?					In what type of container?		
	Yes	No	<1	1-2	3-4	5-6	≥7	Plastic	Cardboard	Glass
Pint										
Quart										
Half-Gallon										
Gallon										
Single Serve Size										
Other (please specify) _____			How many per week ____					Container? _____		

8. How often do you purchase each of the following kinds of milk?

	On A Weekly Basis	A Few Times a Month	Only Occasionally	Never Purchase
Skim Milk				
1% Milk				
2% Milk				
Whole Milk				
Lactose Free				
Flavored Milk (What flavor?) _____				

9. Where do you regularly buy milk?

(Check all that apply)

- Convenience Store__
- Directly from Local Dairy/Farm__
- Cafeteria__
- Vending Machine__
- Food Warehouse/Superstore_____
- Supermarket__
- Home Delivery _____
- Other (please specify)_____

10. How important are the following to you in choosing milk?

	Very Important	Somewhat Important	Somewhat Unimportant	Very Unimportant
Cost				
Brand				
Massachusetts Produced				
Taste				
Calories				
Health Benefits				
Environmentally Friendly Packaging				
Attractiveness of Bottle				
Buying Local				
Variety of Flavors				
Organic				

Other (please specify) _____

11. How likely would you be to purchase milk assuming it was readily available from a local farmer?

Very Likely ___ Somewhat Likely ___ Somewhat Unlikely ___ Very Unlikely ___

12. Would you be willing to pay more for milk from a local farmer?

Definitely ___ Probably ___ Probably Not ___ Definitely Not ___

13. Would you be willing to pay more for milk if you knew the additional money was going directly to the dairy farmer?

Definitely ___ Probably ___ Probably Not ___ Definitely Not ___

14. How appealing is it to have milk from a local dairy delivered to your home?

Very Appealing ___ Somewhat Appealing ___
Somewhat Unappealing ___ Very Unappealing ___

15. Do you have any suggestions for any new milk products?

16. Which of the following incentives would motivate you to buy local milk?

(Check all that apply)

Home Delivery _____ None _____

Free Samples _____

Coupons _____

Sales/Discounts _____

Packaging _____

Advertisements _____ What media outlets? _____

Part 2. Consumer Perception

17. How many Massachusetts Dairy Farms do you think there are? _____

18. Can you name any?

19. What best describes you?

Very health conscious _____ Somewhat health conscious _____

Not very health conscious _____ Not health conscious at all _____

20. How aware are you of the following health benefits associated with dairy?

	Very Aware	Somewhat Aware	Somewhat Unaware	Very Unaware
Calcium for Bone Health in Adults				
Nonfat Milk Reduces Incidence of Prostate Cancer				
Calcium/Dairy Can Help with Weight Management				
Calcium Prevents Fractures in Children				
Lower Rates of High Blood Pressure				
Lower Colon Cancer Risk				

Other benefits you are aware of? (please specify) _____

21. Where do you go to get health and nutritional information?

(Check all that apply)

Family/Friends _____

Physician's Office _____

Pharmacy _____

Radio _____

Gym/Fitness Centers _____

Television _____

Nutrition Labels _____

Newspaper _____

Health Food Stores _____ Which ones? _____

Magazines _____ Which ones? _____

Internet _____ Which sites? _____

Do not look for health and nutritional information _____

Other (please specify) _____

22. Has your doctor ever recommended the consumption of milk for health benefits?

Yes _____ No _____

Part 3. Demographics

23. What is your gender? Male_____ Female_____

24. What is your age?

18-25 _____ 46-55 _____

26-35 _____ 56-65 _____

36-45 _____ Over 65 _____

25. What is your approximate household income?

less than \$30,000 _____

\$30,000-\$49,999 _____

\$50,000-\$69,999 _____

\$70,000-\$89,999 _____

\$90,000-\$109,999 _____

\$110,000-\$129,999 _____

\$130,000 or more _____

26. What is your highest level of education completed?

Less Than High School Graduate _____ High School Graduate (or equivalent) _____

Some College or Associate's Degree _____ Bachelor's Degree or Higher _____

County: _____

Profile of Sample

	<u>Frequency</u>	<u>Percentage</u>
GENDER:		
Male	(133)	34%
Female	(257)	66%
AGE:		
18-25	(26)	7%
26-35	(19)	5%
36-45	(34)	9%
46-55	(94)	24%
56-65	(83)	21%
Over 65	(134)	34%
ANNUAL HOUSEHOLD INCOME:		
Less than \$30,000	(47)	12%
\$30,000-\$49,999	(49)	13%
\$50,000-\$69,999	(33)	8%
\$70,000-\$89,999	(50)	13%
\$90,000-\$109,999	(12)	3%
\$110,000-\$129,000	(13)	3%
\$130,000 or more	(33)	8%
No Response	(154)	40%
HIGHEST LEVEL OF EDUCATION COMPLETED:		
Less Than High School Graduate	(7)	2%
High School Graduate (or equivalent)	(118)	30%
Some College or Associate's Degree	(114)	29%
Bachelor's Degree or Higher	(151)	39%
COUNTY:		
Barnstable	(11)	3%
Berkshire	(8)	2%
Bristol	(31)	8%
Essex	(42)	11%
Franklin	(4)	1%
Hampden	(27)	7%
Hampshire	(8)	2%
Middlesex	(88)	23%
Norfolk	(38)	10%
Plymouth	(31)	8%
Suffolk	(42)	11%
Worcester	(61)	6%

Significance Test

Test Statistics

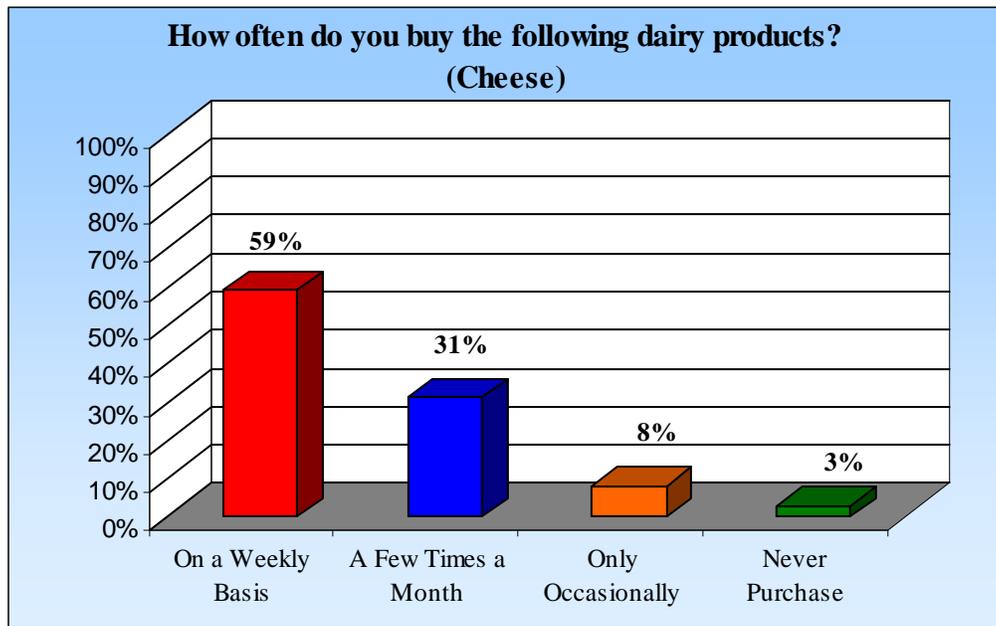
	How often do you buy the following dairy products? (Cheese)	How often do you purchase each of the following kinds of milk? (Whole)	How important are the following to you in choosing milk? (Calories)	Where do you regularly buy milk? (Food Warehouse/Superstore)
Chi-Square(a,b,c)	312.437	402.557	41.284	123.602
df	3	3	3	1
Asymp. Sig.	.000	.000	.000	.000

A Chi-Square test was performed on this data. The data in this study test significant at .000, which indicates the findings are statistically valid.

Question 1a: How often do you buy the following dairy products?
(Cheese)

How often do you buy the following dairy products? (Cheese)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	On A Weekly Basis	231	59.1	59.1	59.1
	A Few Times A Month	120	30.7	30.7	89.8
	Only Occasionally	30	7.7	7.7	97.4
	Never Purchase	10	2.6	2.6	100.0
Total		391	100.0	100.0	

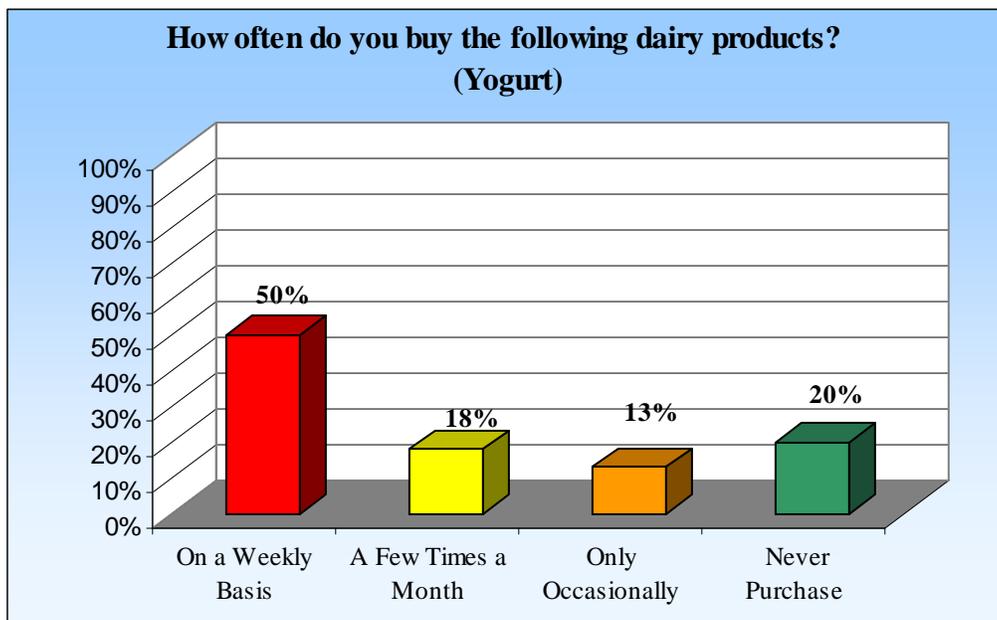


Fifty-nine percent of respondents purchase cheese on a weekly basis, 31% purchase it a few times a month, 8% purchase it occasionally and 3% never purchase it.

Question 1b: How often do you buy the following dairy products?
(Yogurt)

How often do you buy the following dairy products? (Yogurt)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	On A Weekly Basis	196	50.1	50.1	50.1
	A Few Times A Month	69	17.6	17.6	67.8
	Only Occasionally	49	12.5	12.5	80.3
	Never Purchase	77	19.7	19.7	100.0
	Total	391	100.0	100.0	

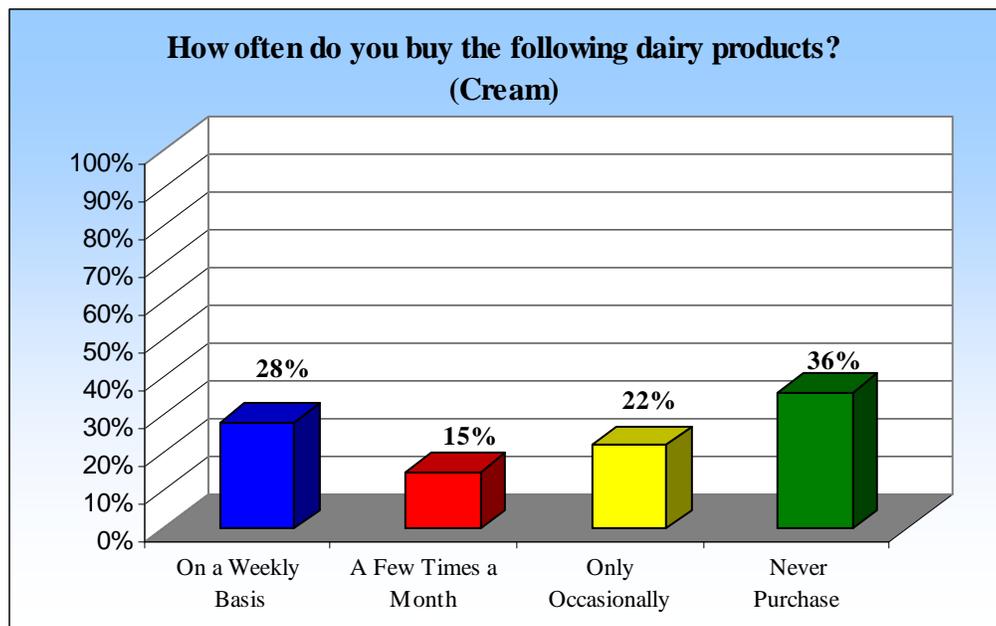


Fifty percent of respondents purchase yogurt on a weekly basis, 18% purchase it a few times a month, 13% purchase it occasionally and 20% never purchase it.

Question 1c: How often do you buy the following dairy products?
(Cream)

How often do you buy the following dairy products? (Cream)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	On A Weekly Basis	108	27.6	27.6	27.6
	A Few Times A Month	57	14.6	14.6	42.2
	Only Occasionally	84	21.5	21.5	63.7
	Never Purchase	142	36.3	36.3	100.0
	Total	391	100.0	100.0	

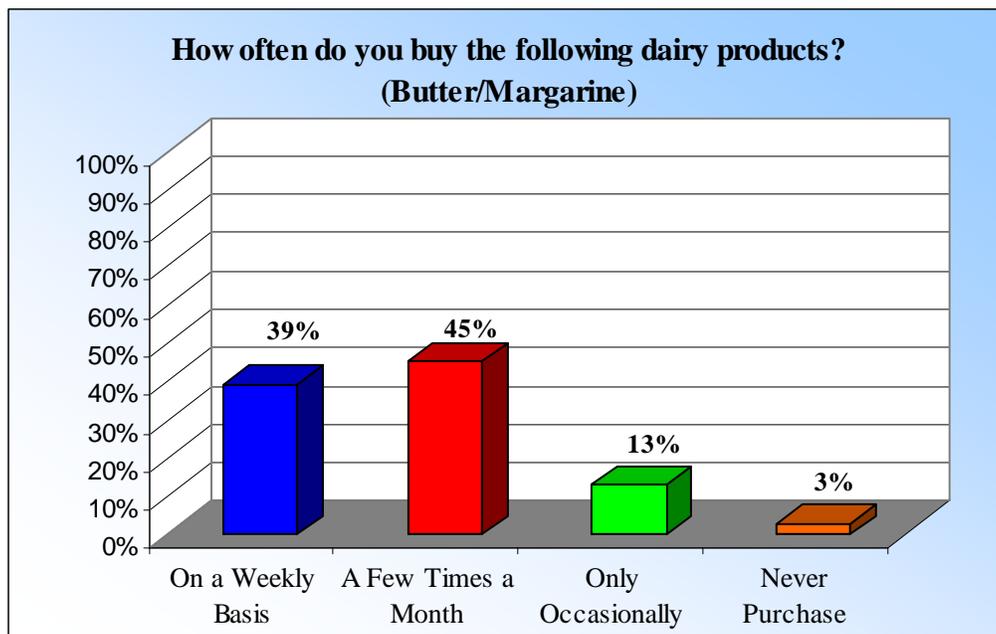


Twenty-eight percent of respondents purchase cream on a weekly basis, 15% purchase it a few times a month, 22% purchase it occasionally and 36% never purchase it.

Question 1d: How often do you buy the following dairy products?
(Butter/Margarine)

How often do you buy the following dairy products? (Butter/Margarine)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	On A Weekly Basis	154	39.4	39.4	39.4
	A Few Times A Month	174	44.5	44.5	83.9
	Only Occasionally	51	13.0	13.0	96.9
	Never Purchase	12	3.1	3.1	100.0
	Total	391	100.0	100.0	

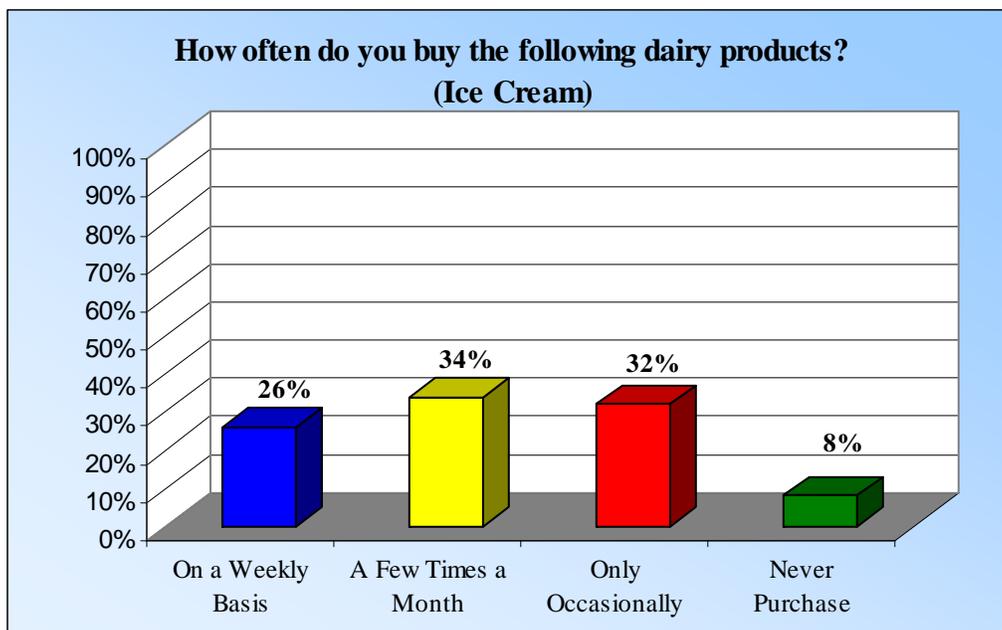


Thirty-nine percent of respondents purchase butter/margarine on a weekly basis, 45% purchase it a few times a month, 13% purchase it occasionally and 3% never purchase it.

Question 1e: How often do you buy the following dairy products?
(Ice Cream)

How often do you buy the following dairy products? (Ice Cream)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	On A Weekly Basis	102	26.1	26.1	26.1
	A Few Times A Month	131	33.5	33.5	59.6
	Only Occasionally	126	32.2	32.2	91.8
	Never Purchase	32	8.2	8.2	100.0
	Total	391	100.0	100.0	

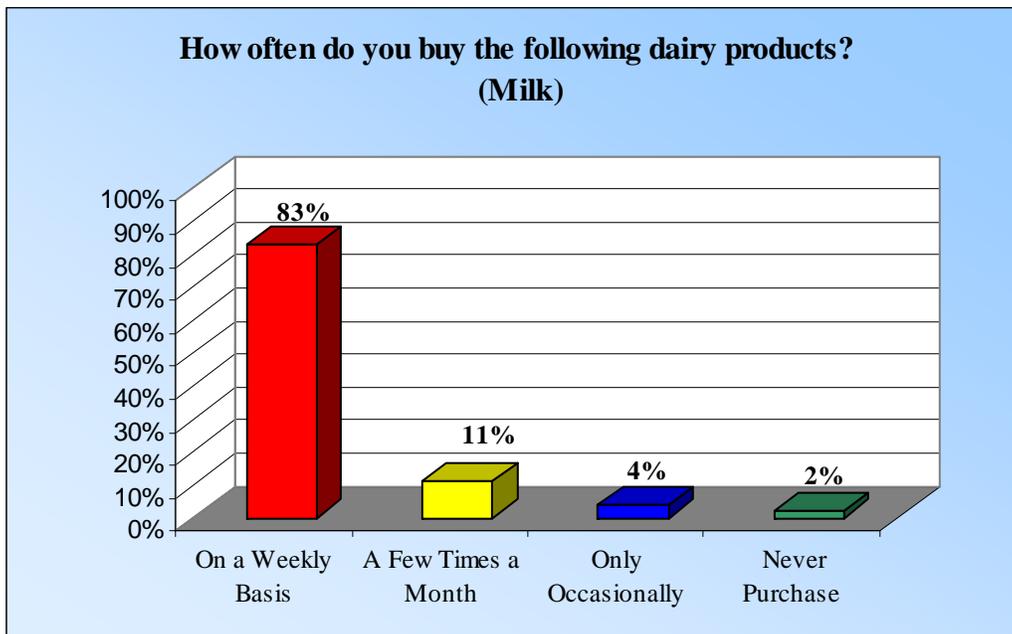


Twenty-six percent of respondents purchase ice cream on a weekly basis, 34% purchase it a few times a month, 32% purchase it occasionally and 8% never purchase it.

Question 1f: How often do you buy the following dairy products?
(Milk)

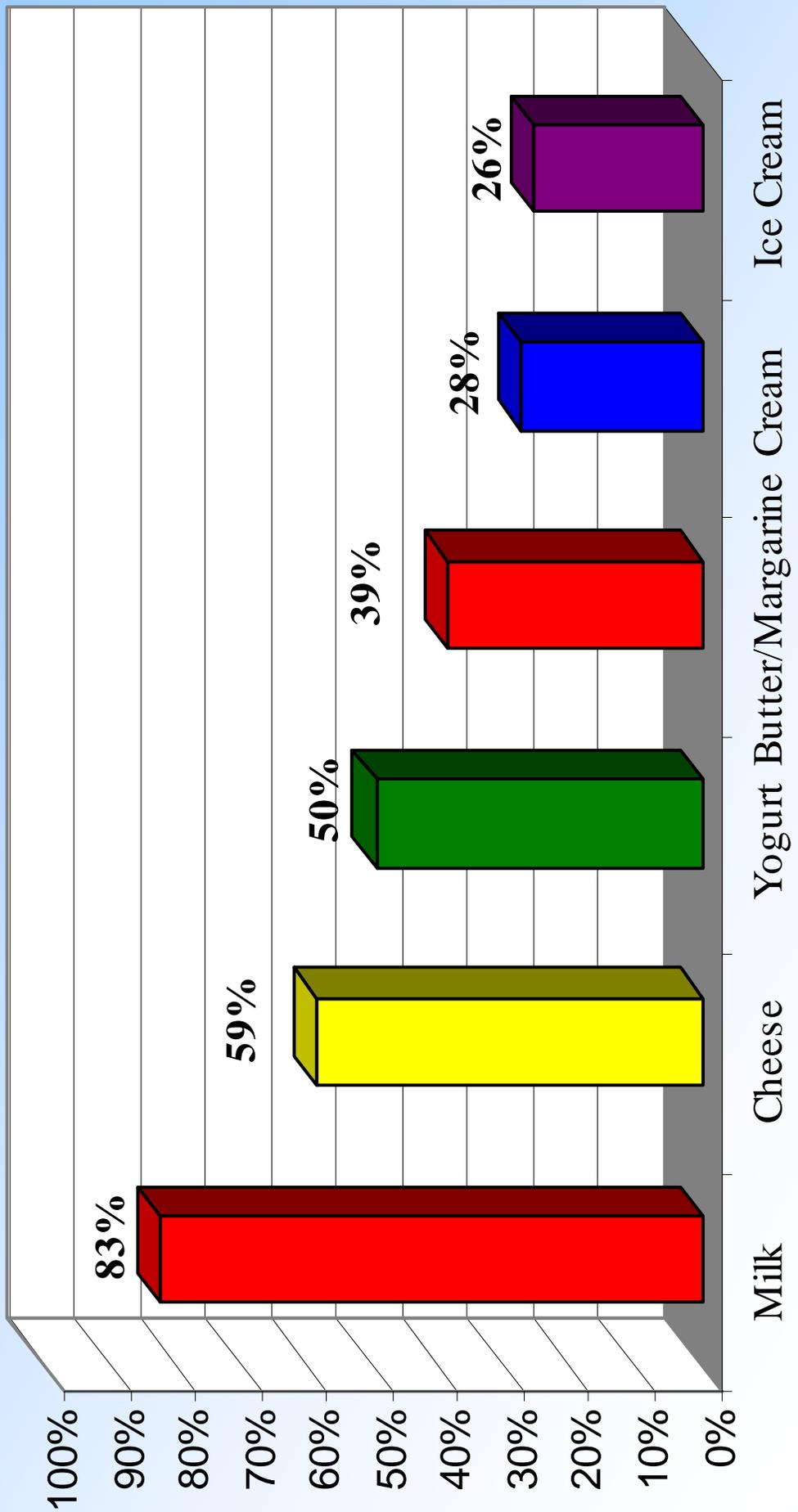
How often do you buy the following dairy products? (Milk)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	On A Weekly Basis	326	83.4	83.4	83.4
	A Few Times A Month	43	11.0	11.0	94.4
	Only Occasionally	16	4.1	4.1	98.5
	Never Purchase	6	1.5	1.5	100.0
Total		391	100.0	100.0	



Eighty-three percent of respondents purchase milk on a weekly basis, 11% purchase it a few times a month, 4% purchase it occasionally and 2% never purchase it.

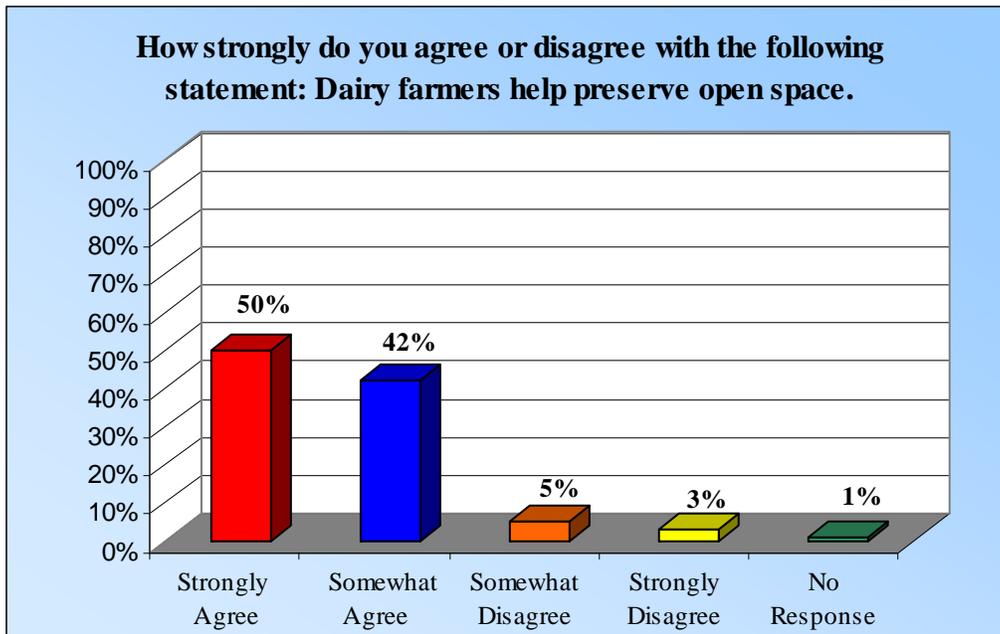
How often do you buy the following dairy products? (% Weekly Basis)



Question 2: How strongly do you agree or disagree with the following statement?
(Dairy Farmers Help Preserve Open Space)

How strongly do you agree or disagree with the following statement: Dairy farmers contribute public services in the form of open space preservation.

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Strongly Agree	195	49.9	49.9	49.9
	Somewhat Agree	165	42.2	42.2	92.1
	Somewhat Disagree	18	4.6	4.6	96.7
	Strongly Disagree	10	2.6	2.6	99.2
	No Response	3	.8	.8	100.0
Total		391	100.0	100.0	

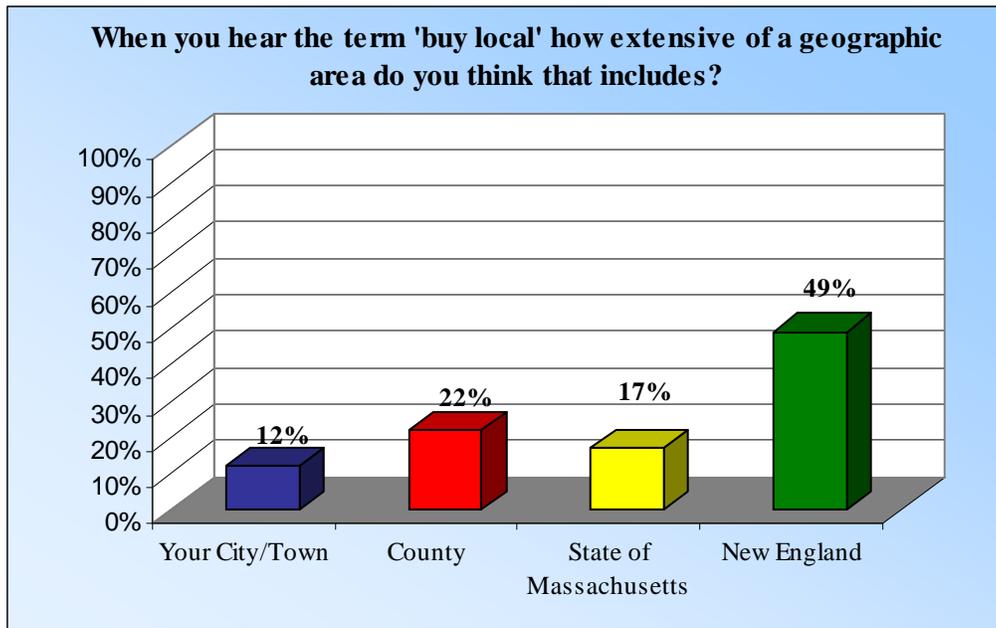


Fifty percent of respondents strongly agree that dairy farmers help preserve open space, 42% somewhat agree, 5% somewhat disagree, 3% strongly disagree and 1% did not respond.

Question 3: When you hear the term 'buy local' how extensive of a geographic area do you think that includes?

When you hear the term "buy local" how extensive a geographic area do you think that includes?

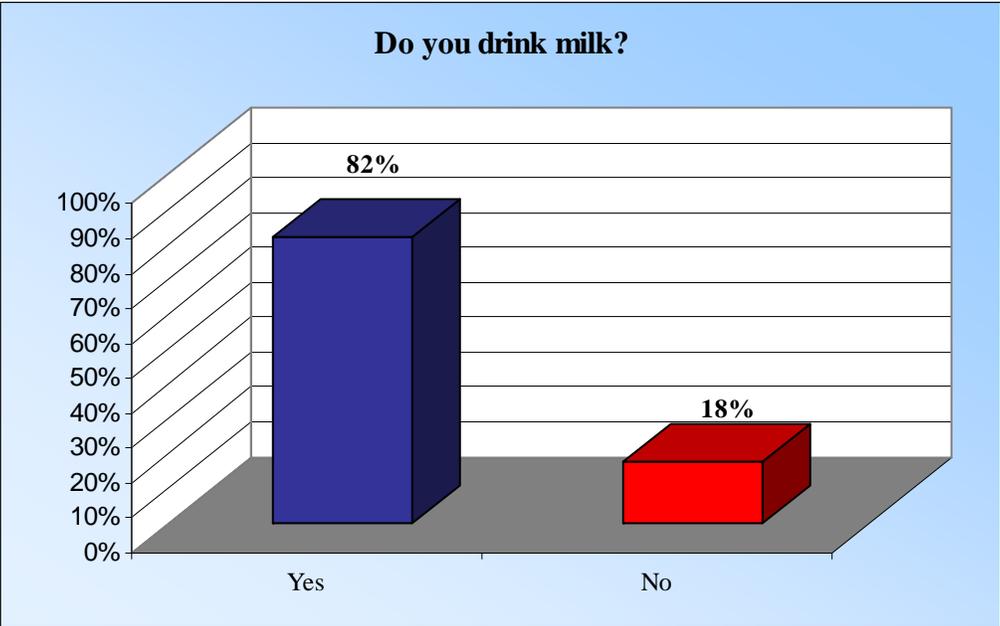
	Frequency	Percent	Valid Percent	Cumulative Percent
Valid Your City/Town	48	12.3	12.3	12.3
County	84	21.5	21.5	33.8
State of Massachusetts	65	16.6	16.6	50.4
New England	192	49.1	49.1	99.5
No Response	2	.5	.5	100.0
Total	391	100.0	100.0	



Twelve percent of respondents think the term 'buy local' extends to only include their city/town, 22% think it also includes their county, 17% think it extends to the state of Massachusetts and 49% think 'buy local' can include all of New England.

Question 4a: Do you drink milk?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	319	81.6	81.6	81.6
	No	72	18.4	18.4	100.0
Total		391	100.0	100.0	



Eighty-two percent of respondents drink milk.

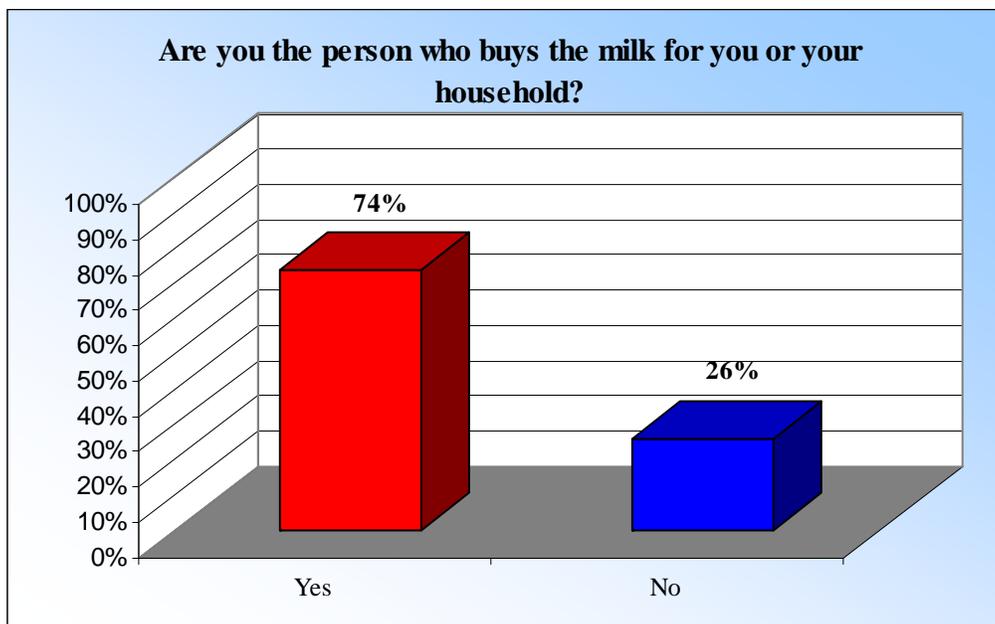
Question 4b: Do you drink milk?
(If no, why not?)

<u>Response</u>	<u>Frequency</u>
Don't like the taste	(27)
Lactose intolerant	(15)
Drink soy milk	(3)
Only eat in cereal	(2)
Allergic to milk	(1)
Don't like the pasteurization process/Find other sources of calcium	(1)
Drink almond milk	(1)
Drink goat milk	(1)
Eat yogurt instead	(1)
Health reasons	(1)
It is abnormal to drink/It's not as good for you as people claim	(1)
Older, don't need calcium	(1)
On a diet	(1)
Only use for coffee	(1)
Outgrew it	(1)
Rather drink a lot of water	(1)
Too fattening	(1)
No Response	(11)
Total Responses	<hr style="width: 100%; border: 0.5px solid black; margin-bottom: 5px;"/> 72

Question 5: Are you the person who buys the milk for you or your household?

Are you the person who buys the milk for you and your household?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	289	73.9	73.9	73.9
	No	102	26.1	26.1	100.0
	Total	391	100.0	100.0	



Seventy-four percent of respondents surveyed buy the milk for themselves or their household.¹

¹ Respondents who said they do not purchase milk for themselves or their households skipped to question 17.

Question 6: What brand of milk do you drink most often?

<u>Response</u>	<u>Frequency</u>
Hood	(89)
Store Brand	(80)
Garellick	(73)
Whatever is on sale	(9)
Doesn't Matter	(5)
Guida	(5)
Smart Balance	(4)
Stony Field	(4)
High Lawn	(4)
Organic	(3)
Organic Cow	(3)
Silk	(3)
Crescent Ridge	(2)
Family Farms	(2)
Over the Moon	(2)
Diamond Natural	(1)
Oakhurst	(1)
Demule's	(1)
Hornstra	(1)
Lactaid	(1)

Question 6: What brand of milk do you drink most often?

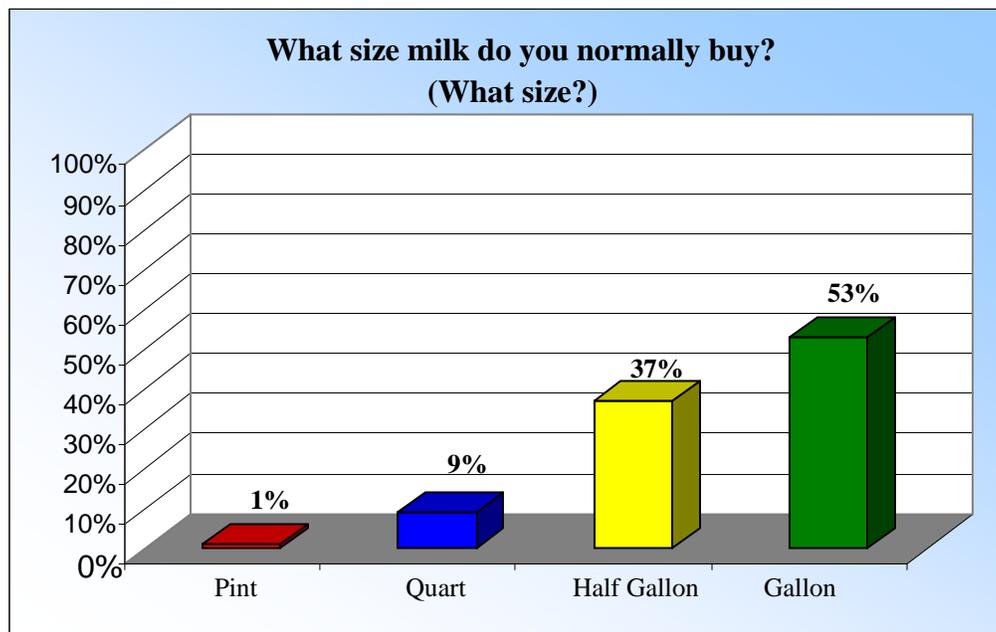
Lactose Free	(1)
Land-o-Lakes	(1)
MapleLine	(1)
New Balance	(1)
Peaceful Meadows	(1)
Rhodie Fresh	(1)
Shaw Farm	(1)
Smart Balance	(1)
Smiley	(1)
Soy/Horizon	(1)
Stoney Brook	(1)
Total Responses ²	<hr/> 310

² Some respondents gave more than one answer.

Question 7a: What size milk do you normally buy?
(What size?)

What size milk do you normally buy? (What size?)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Pint	4	1.0	1.4	1.4
	Quart	25	6.4	8.7	10.0
	Half Gallon	108	27.6	37.4	47.4
	Gallon	152	38.9	52.6	100.0
	Total	289	73.9	100.0	
	N/A	102	26.1		
Total		391	100.0		

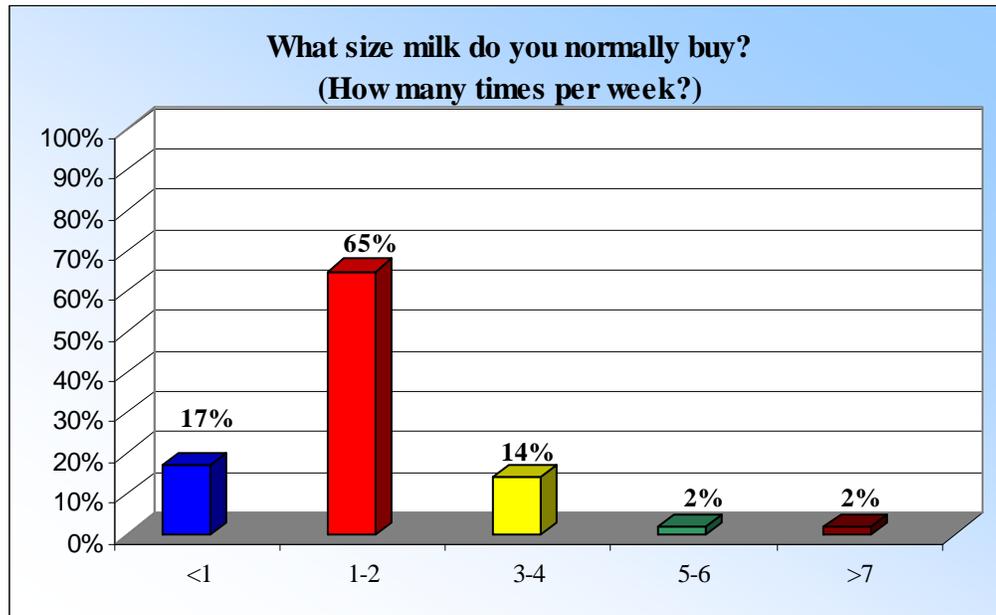


One percent of household shoppers normally buy a pint of milk, 9% normally buy a quart, 37% normally buy a half gallon and 53% normally buy a gallon.

Question 7b: What size milk do you normally buy?
(How many times per week?)

What size milk do you normally buy? (How many times per week?)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Less than once per week	48	12.3	16.6	16.6
	1-2 times per week	189	48.3	65.4	82.0
	3-4 times per week	39	10.0	13.5	95.5
	5-6 times per week	6	1.5	2.1	97.6
	7 or more times per week	7	1.8	2.4	100.0
	Total	289	73.9	100.0	
N/A		102	26.1		
Total		391	100.0		

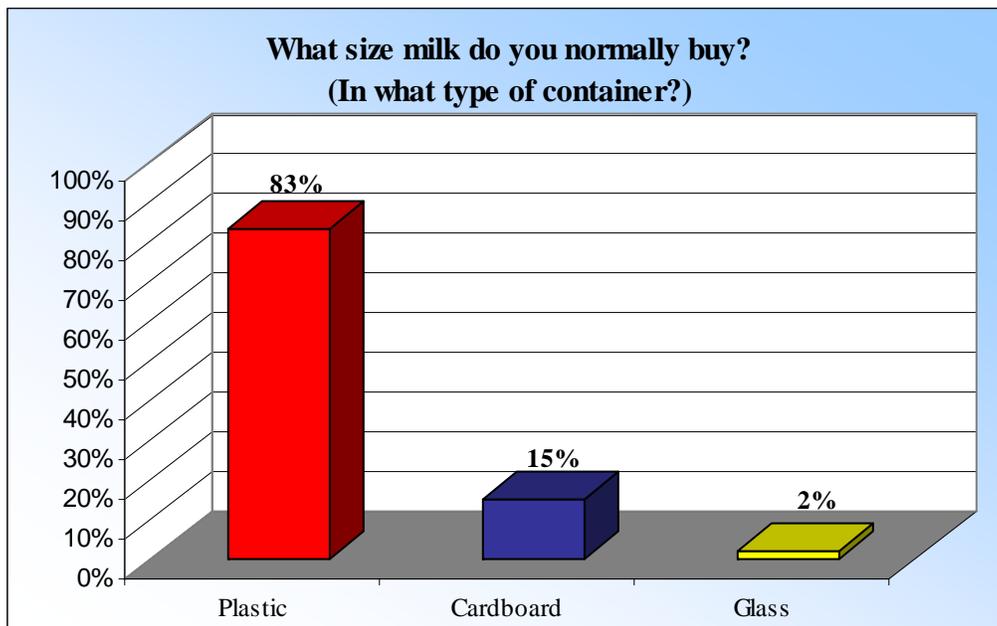


Seventeen percent of household shoppers normally buy less than 1 container of milk per week, 65% buy 1-2 containers per week, 14% buy 3-4 per week, 2% buy 5-6 per week and 2% buy 7 or more per week.

Question 7c: What size milk do you normally buy?
(In what type of container?)

What size milk do you normally buy? (In what type of container?)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Plastic	239	61.1	82.7	82.7
	Cardboard	44	11.3	15.2	97.9
	Glass	6	1.5	2.1	100.0
	Total	289	73.9	100.0	
	N/A	102	26.1		
Total		391	100.0		

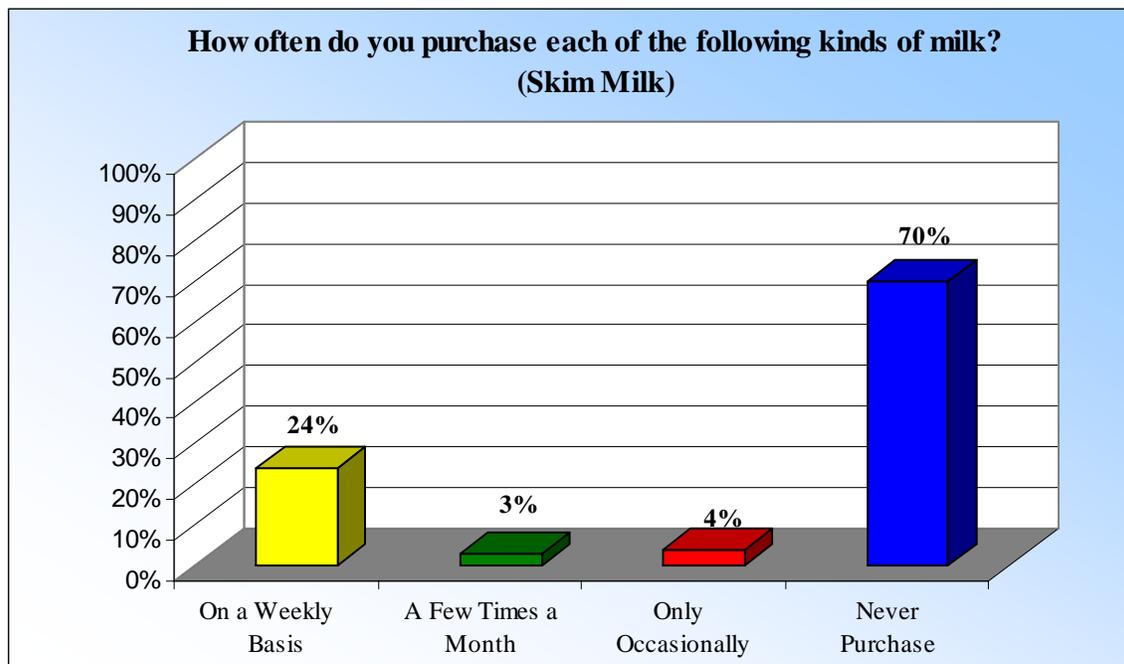


Eighty-three percent of household shoppers normally buy their milk in a plastic container, 15% normally buy it in cardboard containers and 2% buy it in glass containers.

Question 8a: How often do you purchase each of the following kinds of milk?
(Skim Milk)

How often do you purchase each of the following kinds of milk? (Skim)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	On A Weekly Basis	69	17.6	23.9	23.9
	A Few Times A Month	9	2.3	3.1	27.0
	Only Occasionally	10	2.6	3.5	30.4
	Never Purchase	201	51.4	69.6	100.0
	Total	289	73.9	100.0	
	N/A	102	26.1		
Total		391	100.0		

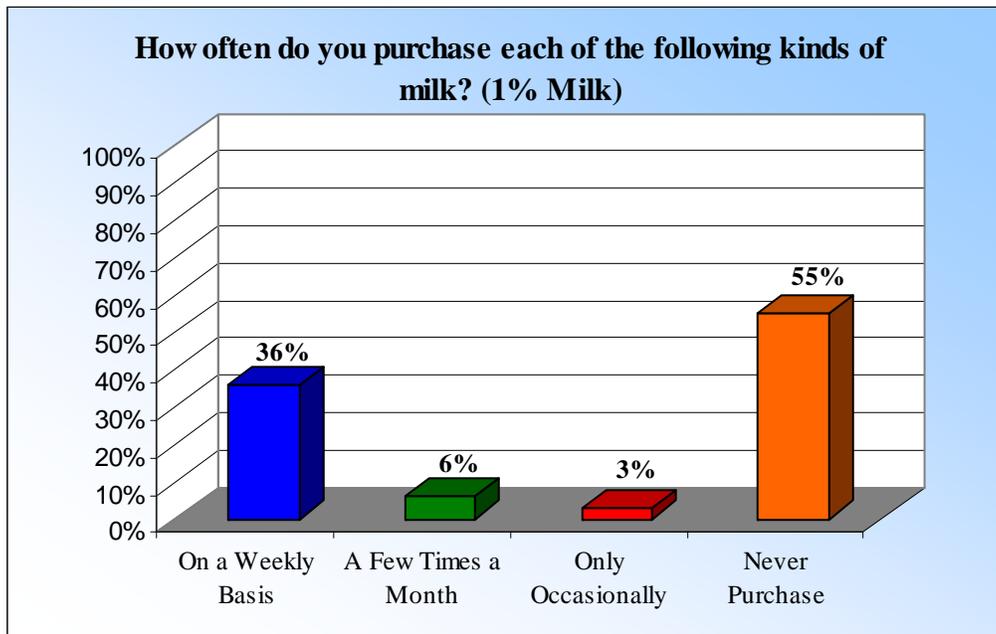


Twenty-four percent of household shoppers purchase skim milk on a weekly basis, 3% purchase it a few times a month, 4% occasionally purchase it and 70% never purchase it.

Question 8b: How often do you purchase each of the following kinds of milk?
(1% Milk)

How often do you purchase each of the following kinds of milk? (1%)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	On A Weekly Basis	104	26.6	36.0	36.0
	A Few Times A Month	18	4.6	6.2	42.2
	Only Occasionally	8	2.0	2.8	45.0
	Never Purchase	159	40.7	55.0	100.0
	Total	289	73.9	100.0	
	N/A	102	26.1		
Total		391	100.0		

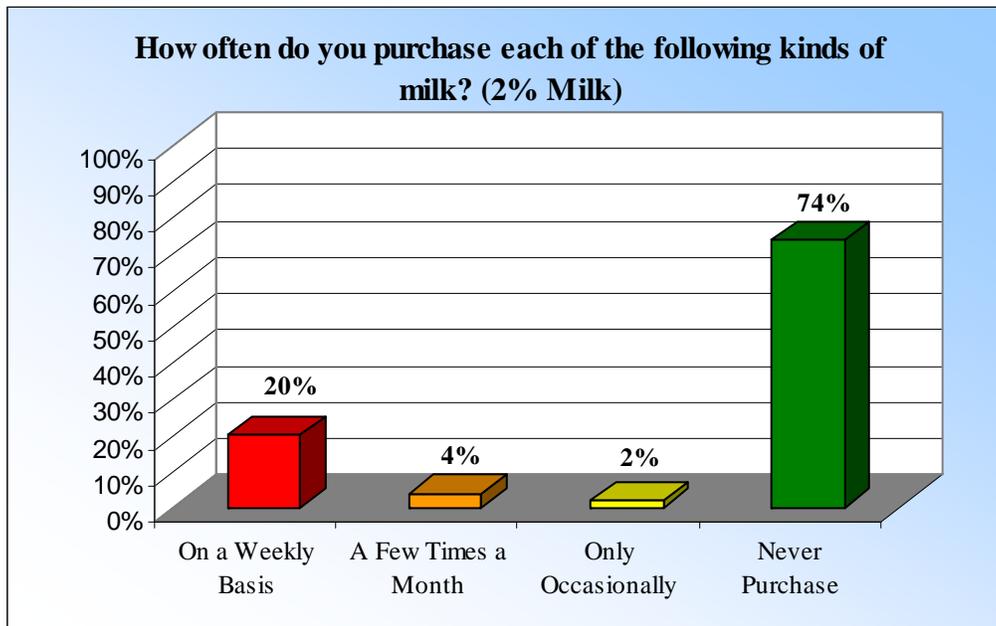


Thirty-six percent of household shoppers purchase 1% milk on a weekly basis, 6% purchase it a few times a month, 3% occasionally purchase it and 55% never purchase it.

Question 8c: How often do you purchase each of the following kinds of milk?
(2% Milk)

How often do you purchase each of the following kinds of milk? (2%)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	On A Weekly Basis	58	14.8	20.1	20.1
	A Few Times A Month	11	2.8	3.8	23.9
	Only Occasionally	6	1.5	2.1	26.0
	Never Purchase	214	54.7	74.0	100.0
	Total	289	73.9	100.0	
	N/A	102	26.1		
Total		391	100.0		

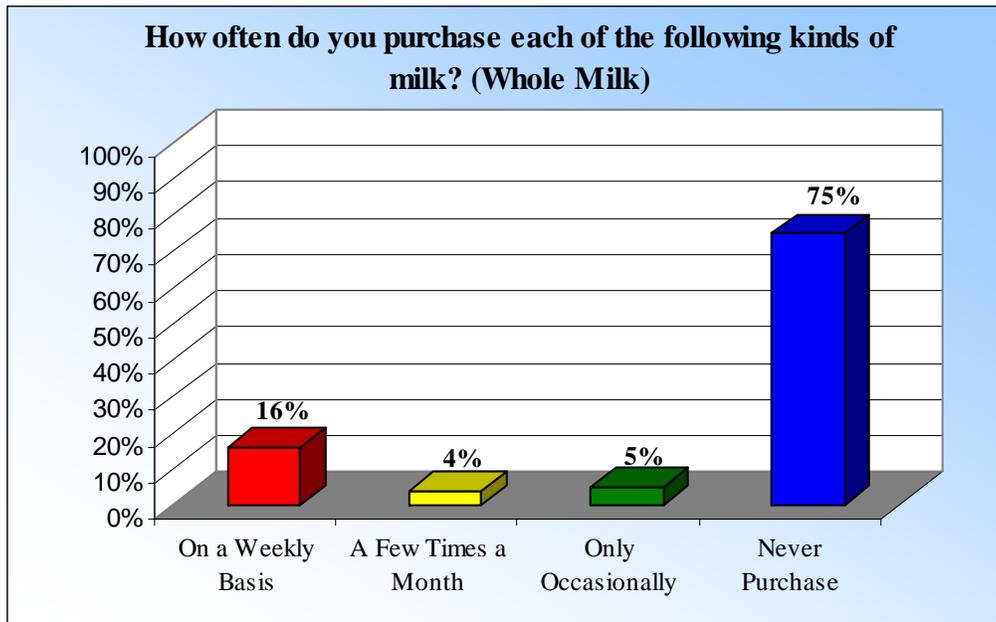


Twenty percent of household shoppers purchase 2% milk on a weekly basis, 4% purchase it a few times a month, 2% purchase it occasionally and 74% never purchase it.

Question 8d: How often do you purchase each of the following kinds of milk?
(Whole Milk)

How often do you purchase each of the following kinds of milk? (Whole)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	On A Weekly Basis	46	11.8	15.9	15.9
	A Few Times A Month	10	2.6	3.5	19.4
	Only Occasionally	15	3.8	5.2	24.6
	Never Purchase	218	55.8	75.4	100.0
	Total	289	73.9	100.0	
	N/A	102	26.1		
Total		391	100.0		

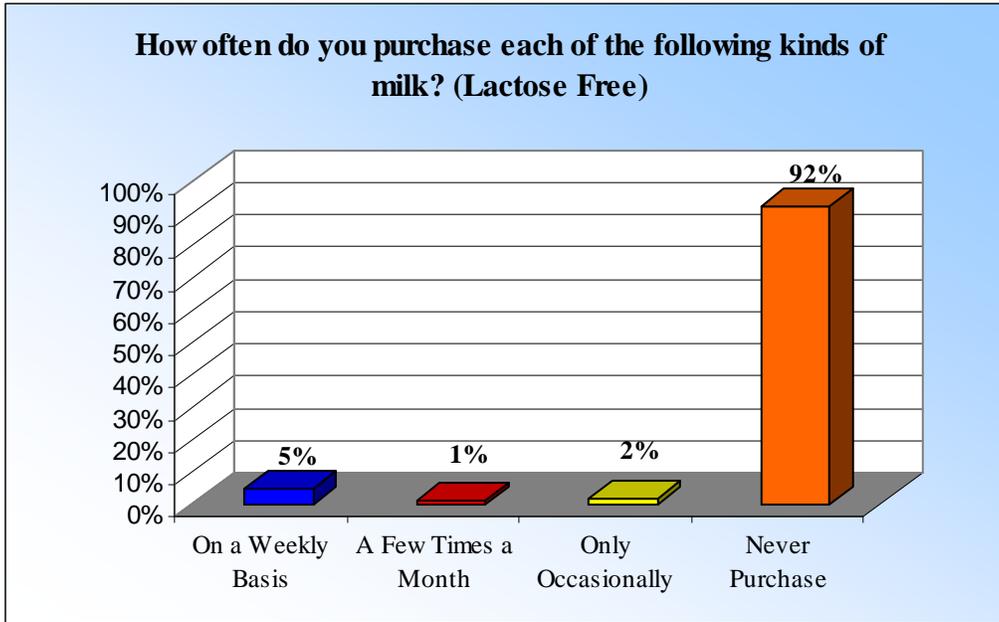


Sixteen percent of household shoppers purchase whole milk on a weekly basis, 4% purchase it a few times a month, 5% occasionally purchase it and 75% never purchase it.

Question 8e: How often do you purchase each of the following kinds of milk?
(Lactose Free)

How often do you purchase each of the following kinds of milk? (Lactose Free)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	On A Weekly Basis	14	3.6	4.8	4.8
	A Few Times A Month	2	.5	.7	5.5
	Only Occasionally	6	1.5	2.1	7.6
	Never Purchase	267	68.3	92.4	100.0
	Total	289	73.9	100.0	
	N/A	102	26.1		
Total		391	100.0		

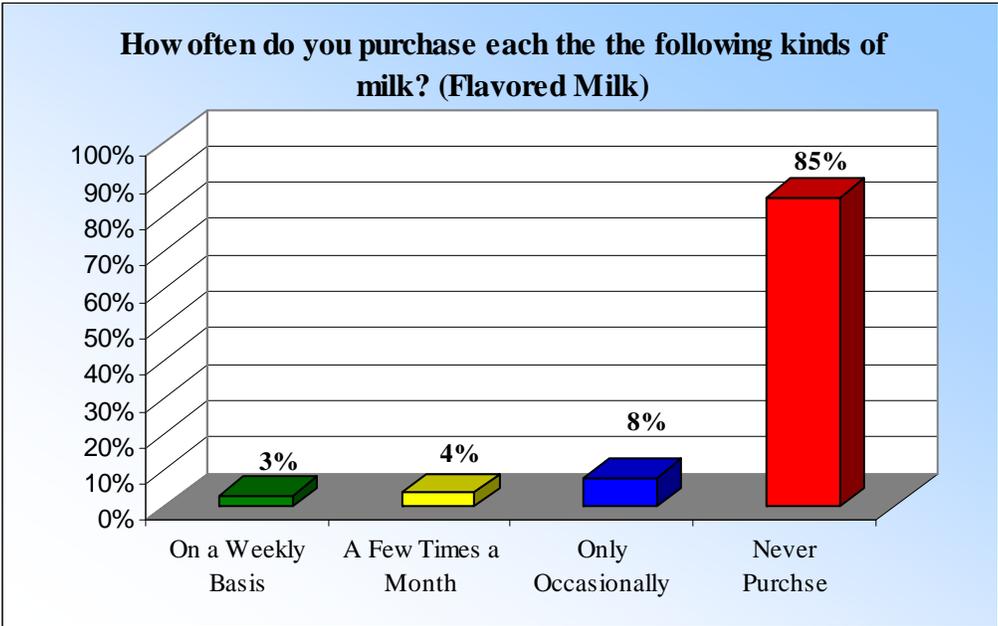


Five percent of household shoppers purchase lactose free milk on a weekly basis, 1% purchase it a few times a month, 2% occasionally purchase it and 92% never purchase it.

Question 8f: How often do you purchase each of the following kinds of milk?
(Flavored Milk)

How often do you purchase each of the following kinds of milk? (Flavored)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	On A Weekly Basis	9	2.3	3.1	3.1
	A Few Times A Month	12	3.1	4.2	7.3
	Only Occasionally	23	5.9	8.0	15.2
	Never Purchase	245	62.7	84.8	100.0
	Total	289	73.9	100.0	
	N/A	102	26.1		
Total		391	100.0		

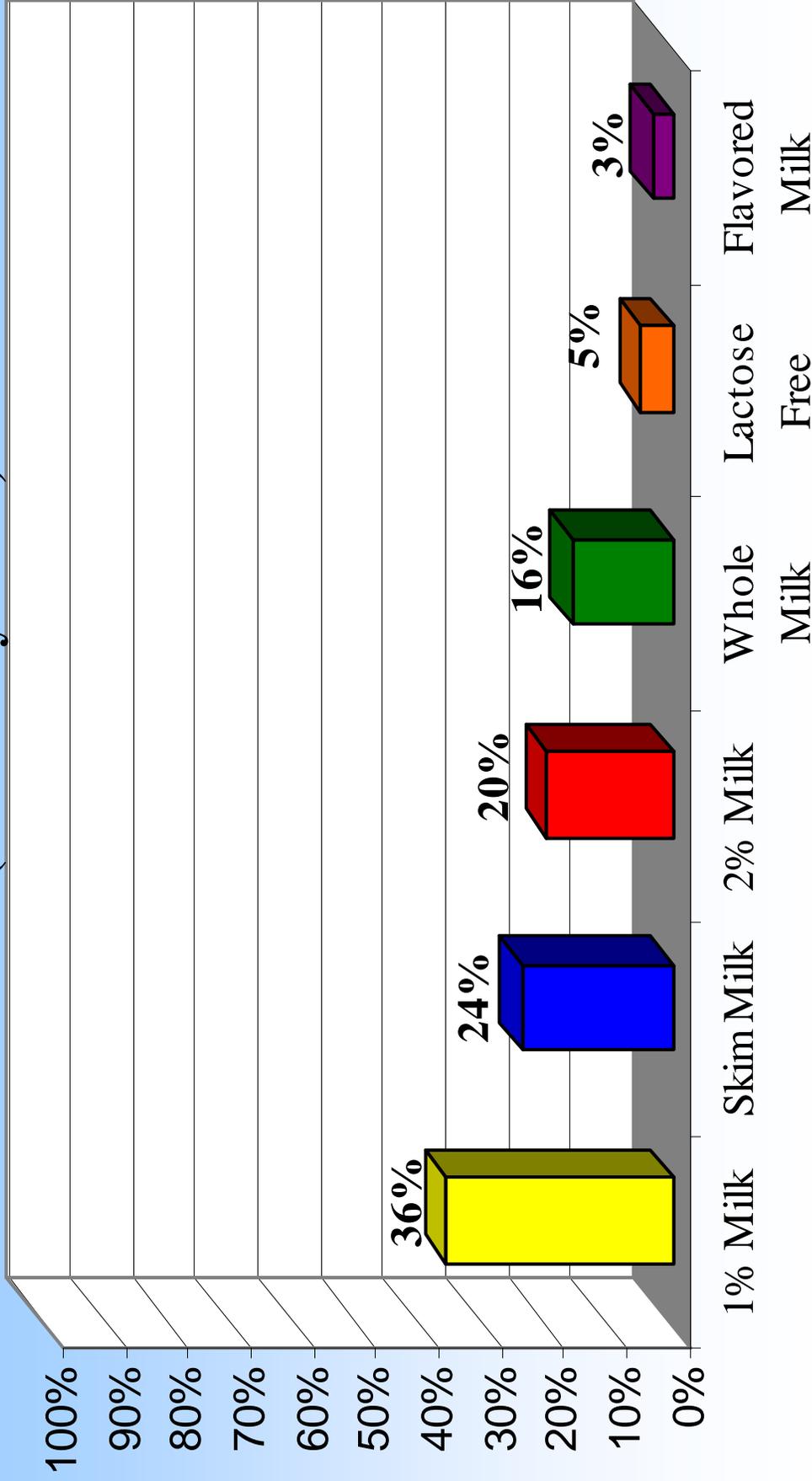


Three percent of household shoppers purchase flavored milk on a weekly basis, 4% purchase it a few times a month, 8% occasionally purchase it and 85% never purchase it.

Question 8g: How often do you purchase each of the following kinds of milk?:
(What flavor milk?)

Chocolate	(32)
Coffee	(2)
Almond	(1)
Strawberry	(1)
Soy Milk	(1)
Vanilla	(1)
Not Specified	(1)
Total Responses	<hr/> 39

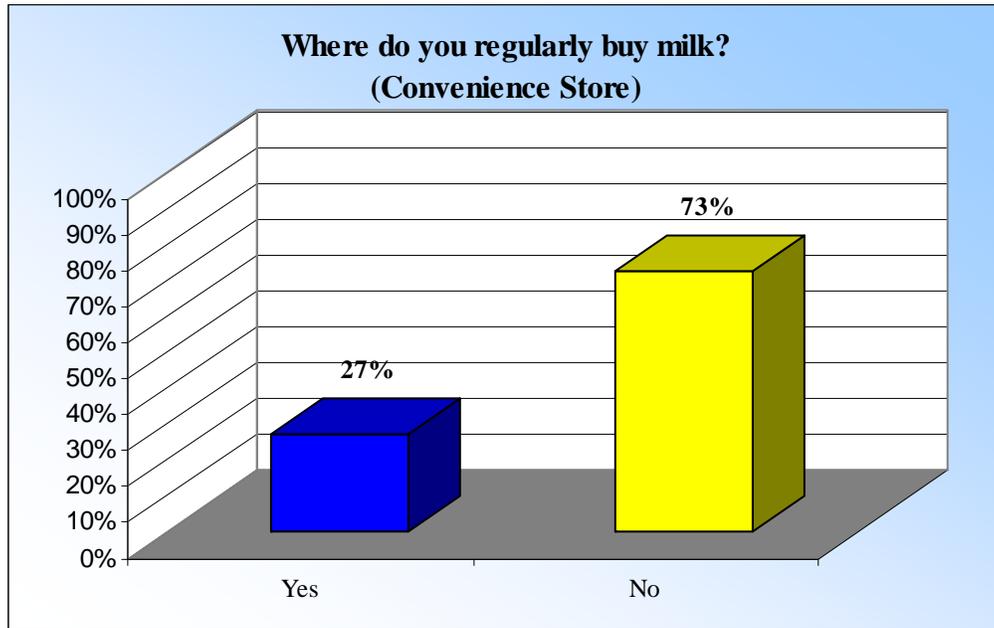
How often do you purchase each of the following kinds of milk? (% Weekly Basis)



Question 9a: Where do you regularly buy milk?
(Convenience Store)

Where do you regularly buy milk? (Convenience Store)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	79	20.2	27.3	27.3
	No	210	53.7	72.7	100.0
	Total	289	73.9	100.0	
	N/A	102	26.1		
Total		391	100.0		

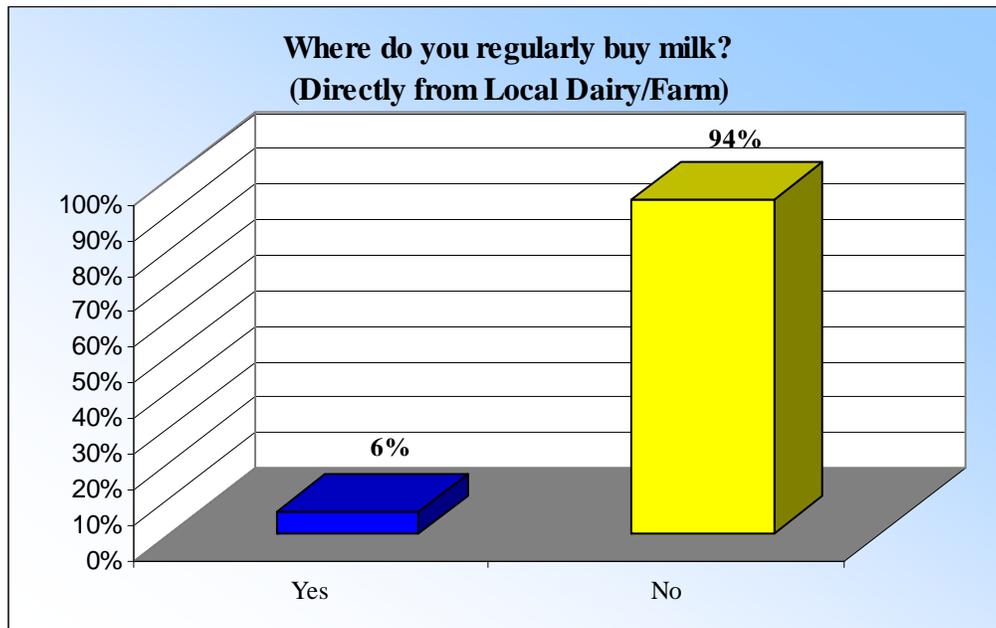


Twenty-seven percent of household shoppers regularly buy milk at a convenience store.

Question 9b: Where do you regularly buy milk?
(Directly from Local Dairy/Farm)

Where do you regularly buy milk? (Directly from Local Dairy/Farm)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	17	4.3	5.9	5.9
	No	272	69.6	94.1	100.0
	Total	289	73.9	100.0	
	N/A	102	26.1		
Total		391	100.0		

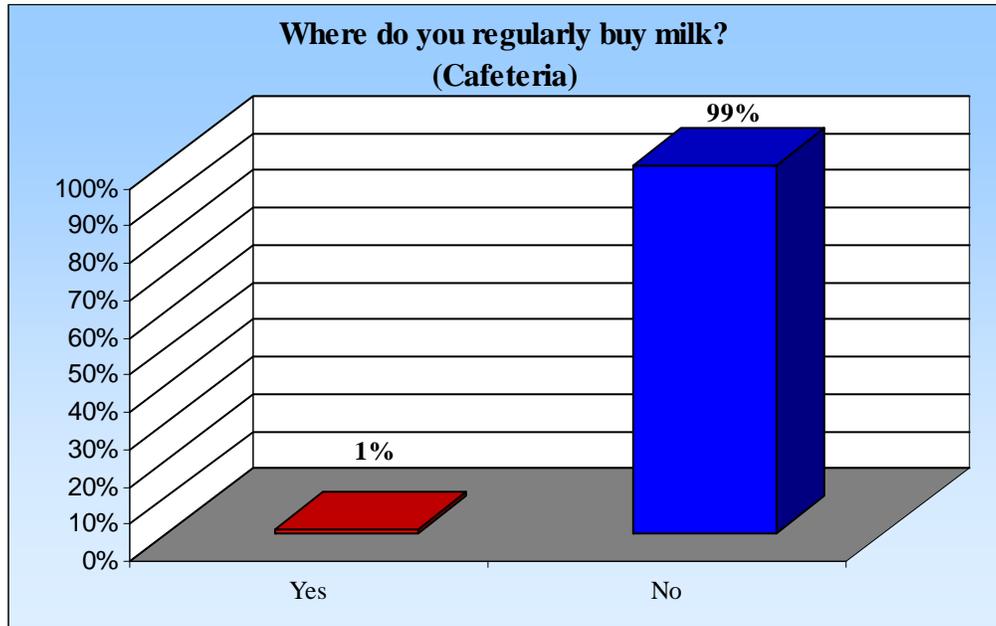


Six percent of household shoppers regularly buy milk directly from a local dairy/farm.

Question 9c: Where do you regularly buy milk?
(Cafeteria)

Where do you regularly buy milk? (Cafeteria)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	3	.8	1.0	1.0
	No	286	73.1	99.0	100.0
	Total	289	73.9	100.0	
	N/A	102	26.1		
Total		391	100.0		

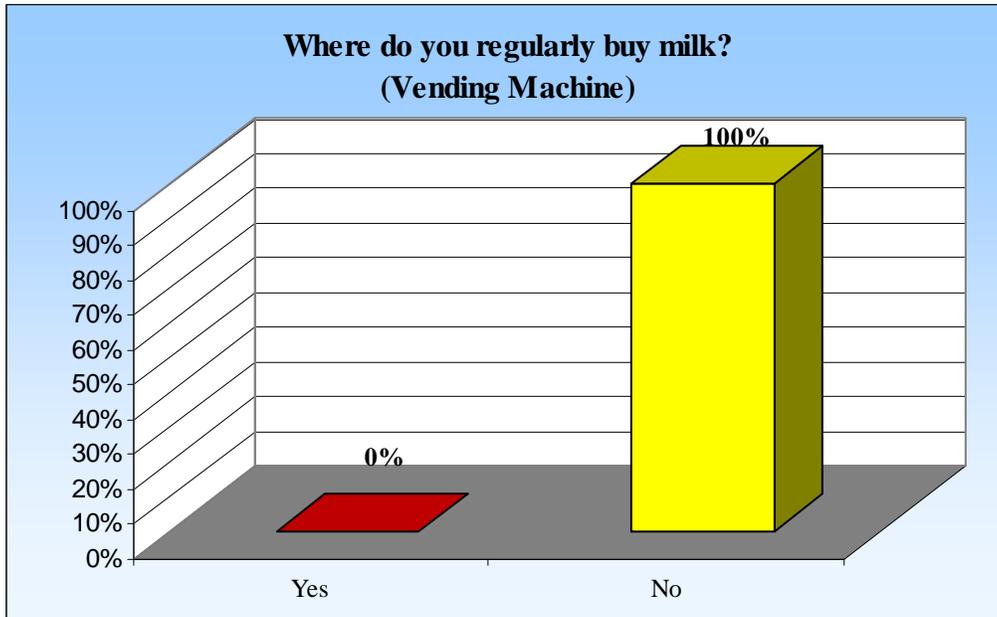


One percent of household shoppers regularly buy milk from a cafeteria.

Question 9d: Where do you regularly buy milk?
(Vending Machine)

Where do you regularly buy milk? (Vending Machine)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	1	.3	.3	.3
	No	288	73.7	99.7	100.0
	Total	289	73.9	100.0	
	N/A	102	26.1		
Total		391	100.0		

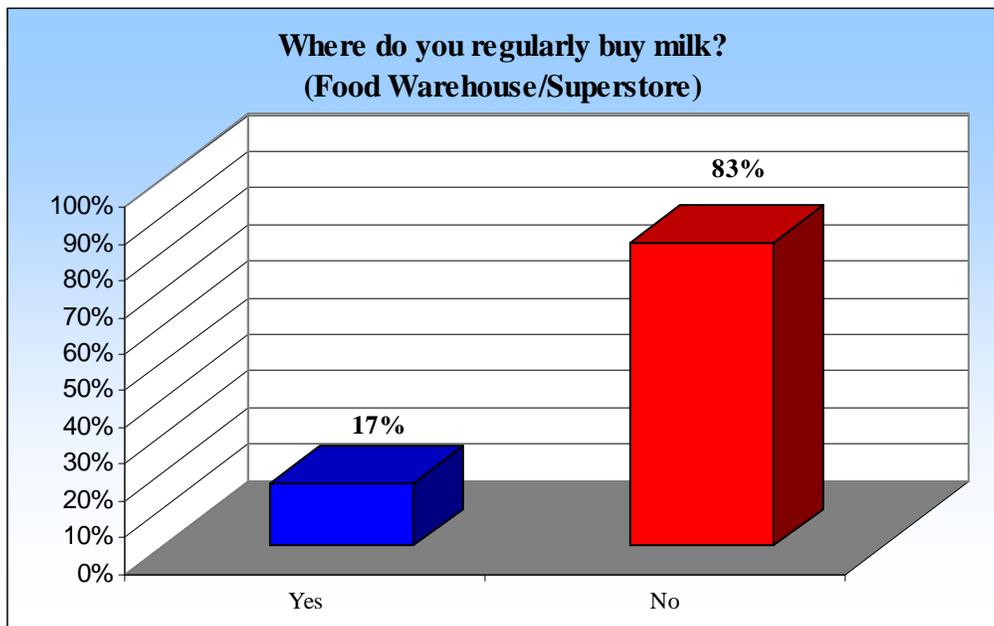


No household shoppers regularly buy milk from a vending machine.

Question 9e: Where do you regularly buy milk?
(Food Warehouse/Superstore)

Where do you regularly buy milk? (Food Warehouse/Superstore)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	50	12.8	17.3	17.3
	No	239	61.1	82.7	100.0
	Total	289	73.9	100.0	
	N/A	102	26.1		
Total		391	100.0		

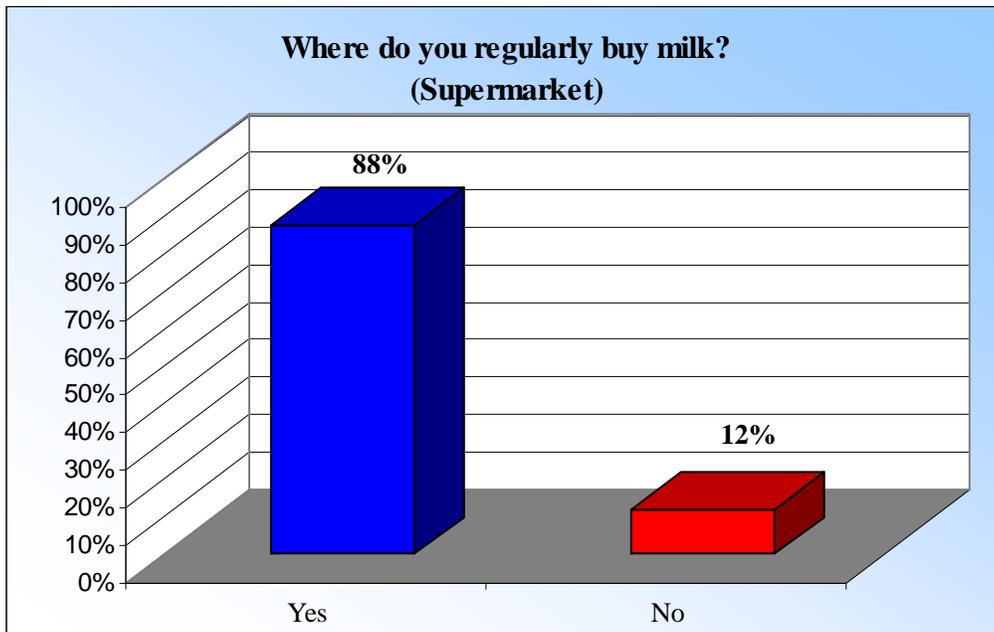


Seventeen percent of household shoppers regularly buy milk from a food warehouse/superstore.

Question 9f: Where do you regularly buy milk?
(Supermarket)

Where do you regularly buy milk? (Supermarket)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	254	65.0	87.9	87.9
	No	35	9.0	12.1	100.0
	Total	289	73.9	100.0	
	N/A	102	26.1		
Total		391	100.0		

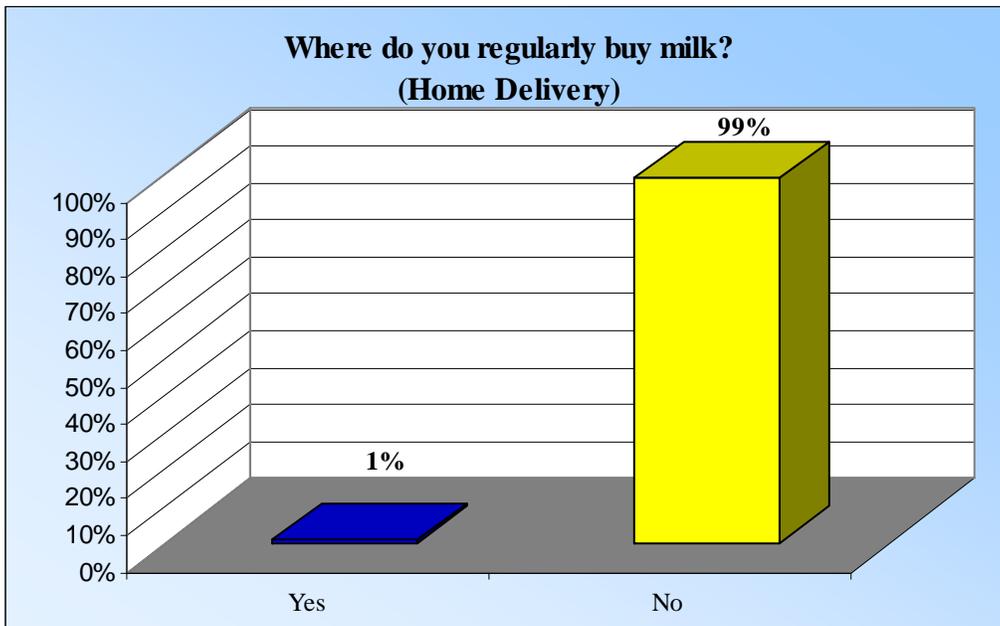


Eighty-eight percent of household shoppers regularly buy milk from a supermarket.

Question 9g: Where do you regularly buy milk?
(Home Delivery)

Where do you regularly buy milk? (Home Delivery)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	4	1.0	1.4	1.4
	No	285	72.9	98.6	100.0
	Total	289	73.9	100.0	
	N/A	102	26.1		
Total		391	100.0		

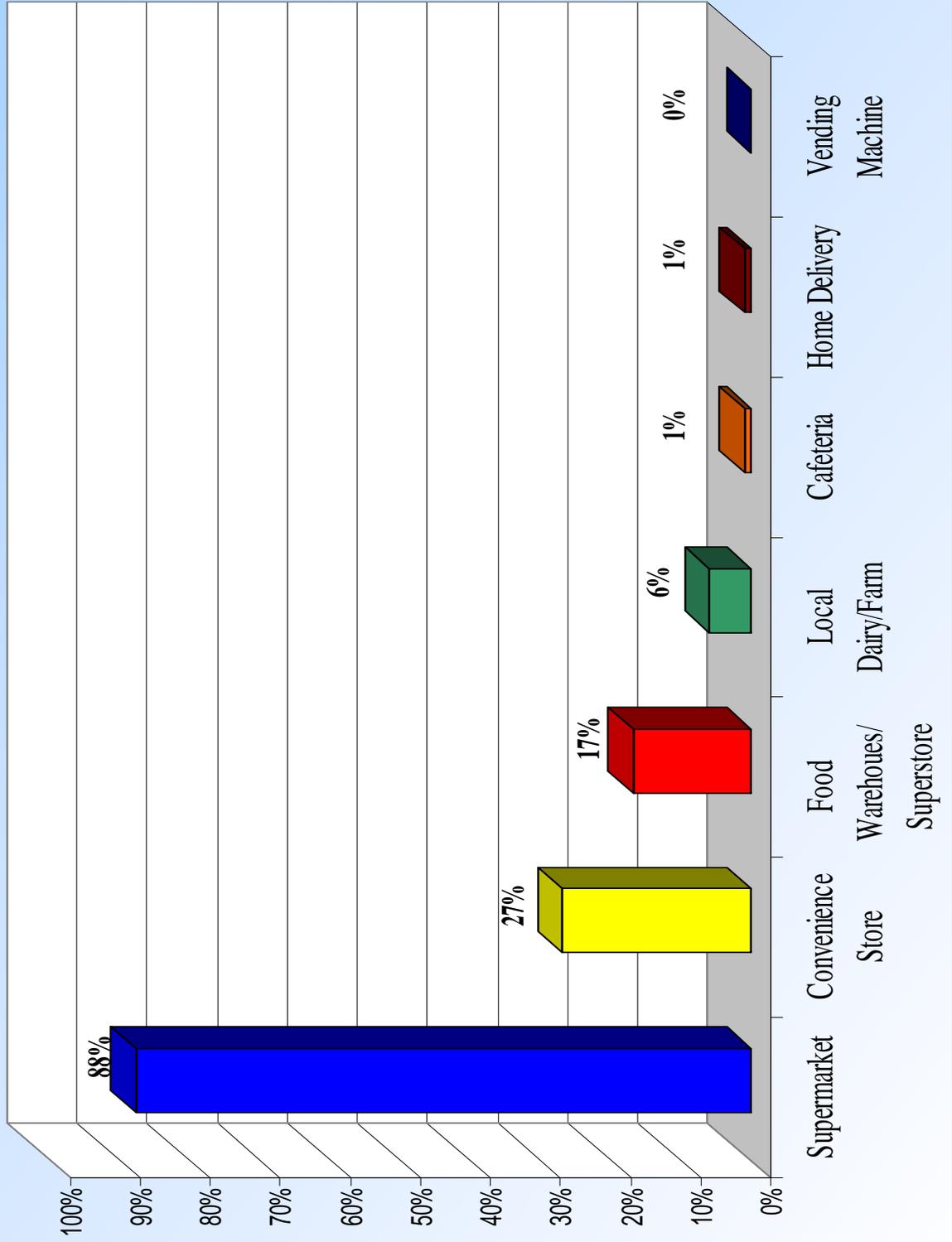


One percent of household shoppers have their milk delivered to their home.

Question 9h: Where do you regularly buy milk?
(Other, please specify)

<u>Response</u>	<u>Frequency</u>
Military Commissary	(1)
Total Responses	<hr/> 1

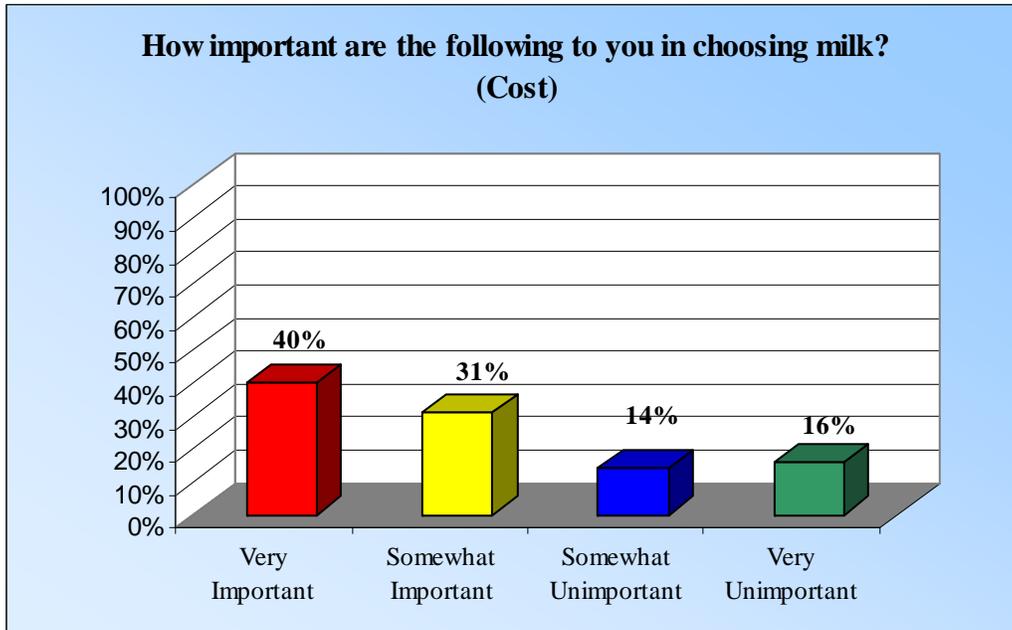
Where do you regularly buy milk? (% Yes)



Question 10a: How important are the following to you in choosing milk?
(Cost)

How important are the following to you in choosing milk? (Cost)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Very Important	115	29.4	39.8	39.8
	Somewhat Important	89	22.8	30.8	70.6
	Somewhat Unimportant	40	10.2	13.8	84.4
	Very Unimportant	45	11.5	15.6	100.0
	Total	289	73.9	100.0	
	N/A	102	26.1		
Total		391	100.0		

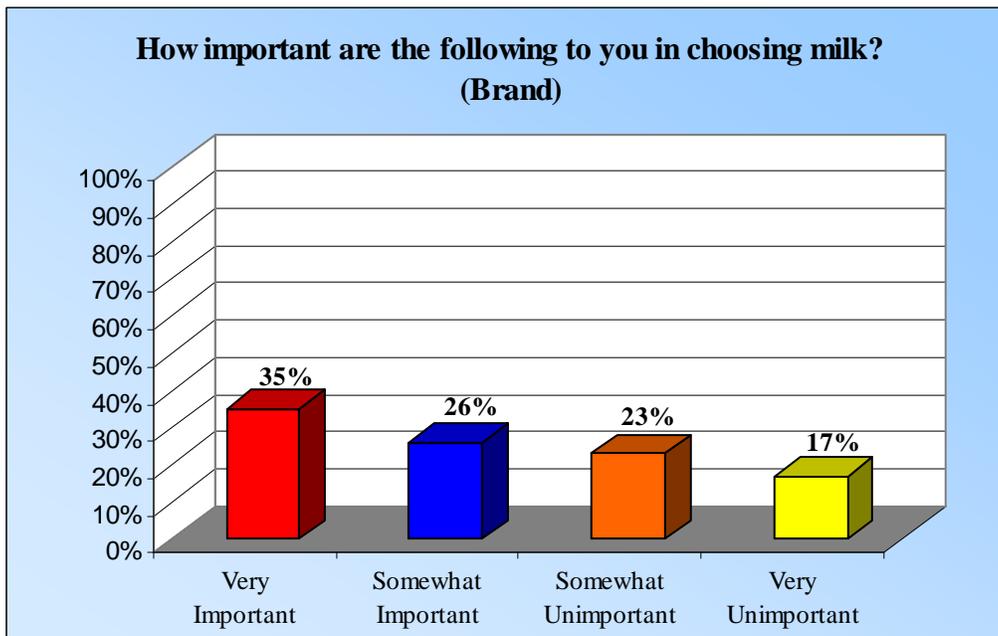


Forty percent of household shoppers said that cost is very important in choosing milk, 31% said it is somewhat important, 14% said it is somewhat unimportant and 16% said it is very unimportant.

Question 10b: How important are the following to you in choosing milk?
(Brand)

How important are the following to you in choosing milk? (Brand)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Very Important	101	25.8	34.9	34.9
	Somewhat Important	74	18.9	25.6	60.6
	Somewhat Unimportant	65	16.6	22.5	83.0
	Very Unimportant	49	12.5	17.0	100.0
	Total	289	73.9	100.0	
	N/A	102	26.1		
Total		391	100.0		

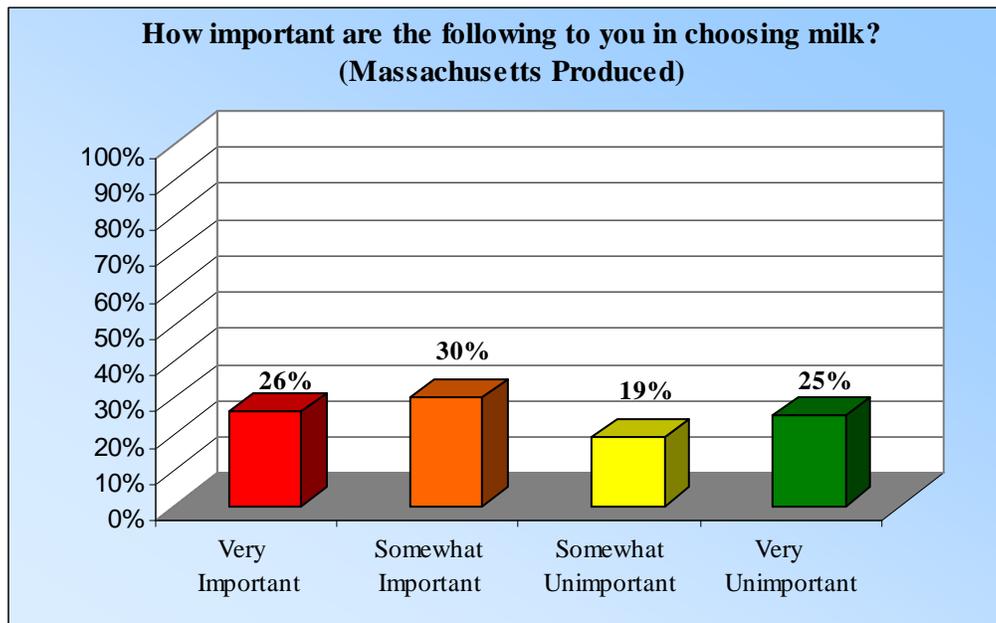


Thirty-five percent of household shoppers said brand is very important when choosing milk, 26% said it is somewhat important, 23% said it is somewhat unimportant and 17% said it is very unimportant.

Question 10c: How important are the following to you in choosing milk?
(Massachusetts Produced)

How important are the following to you in choosing milk? (Massachusetts Produced)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Very Important	74	18.9	25.6	25.6
	Somewhat Important	86	22.0	29.8	55.4
	Somewhat Unimportant	56	14.3	19.4	74.7
	Very Unimportant	73	18.7	25.3	100.0
	Total	289	73.9	100.0	
	N/A	102	26.1		
Total		391	100.0		

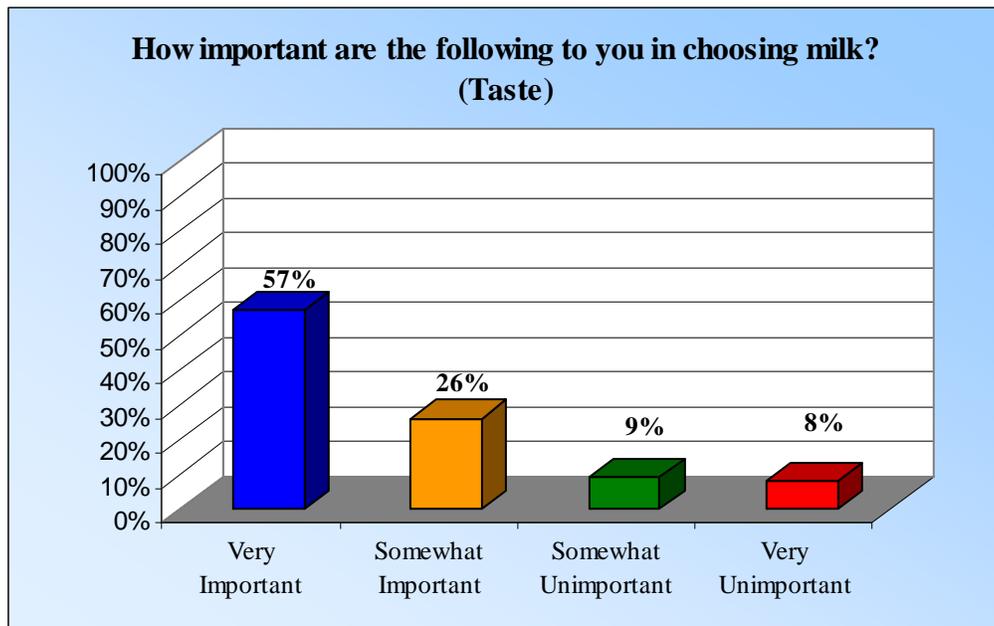


Twenty-six percent of household shoppers said that milk being Massachusetts produced is very important when choosing milk, 30% said it is somewhat important, 19% said it is somewhat unimportant and 25% said it is very unimportant.

Question 10d: How important are the following to you in choosing milk?
(Taste)

How important are the following to you in choosing milk? (Taste)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Very Important	165	42.2	57.1	57.1
	Somewhat Important	74	18.9	25.6	82.7
	Somewhat Unimportant	27	6.9	9.3	92.0
	Very Unimportant	23	5.9	8.0	100.0
	Total	289	73.9	100.0	
	N/A	102	26.1		
Total		391	100.0		

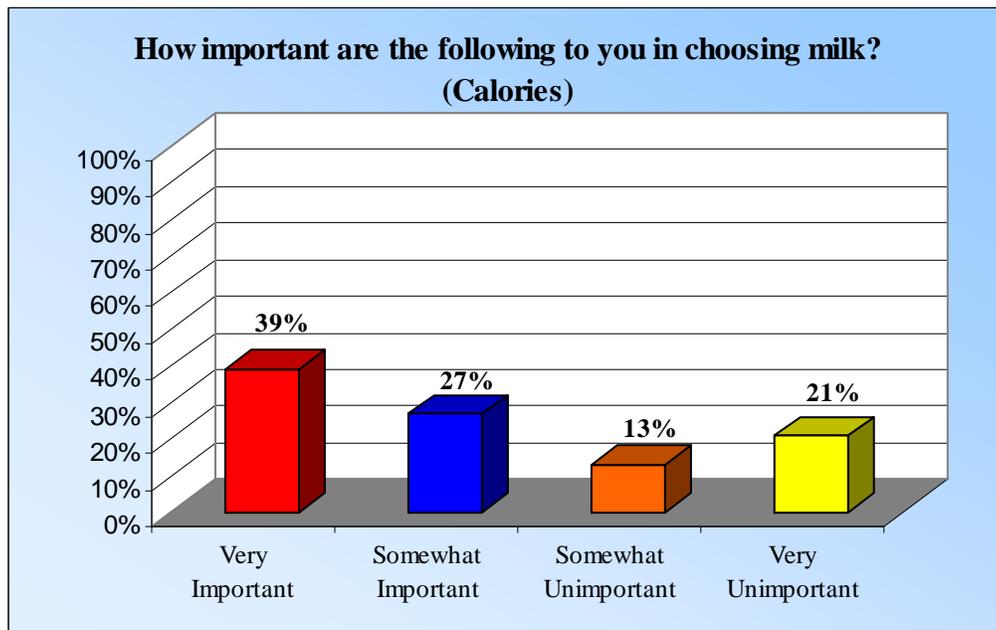


Fifty-seven percent of household shoppers said that taste is very important when choosing milk, 26% said it is somewhat important, 9% said it is somewhat unimportant and 8% said it is very unimportant.

Question 10e: How important are the following to you in choosing milk?
(Calories)

How important are the following to you in choosing milk? (Calories)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Very Important	113	28.9	39.1	39.1
	Somewhat Important	77	19.7	26.6	65.7
	Somewhat Unimportant	38	9.7	13.1	78.9
	Very Unimportant	61	15.6	21.1	100.0
	Total	289	73.9	100.0	
	N/A	102	26.1		
Total		391	100.0		

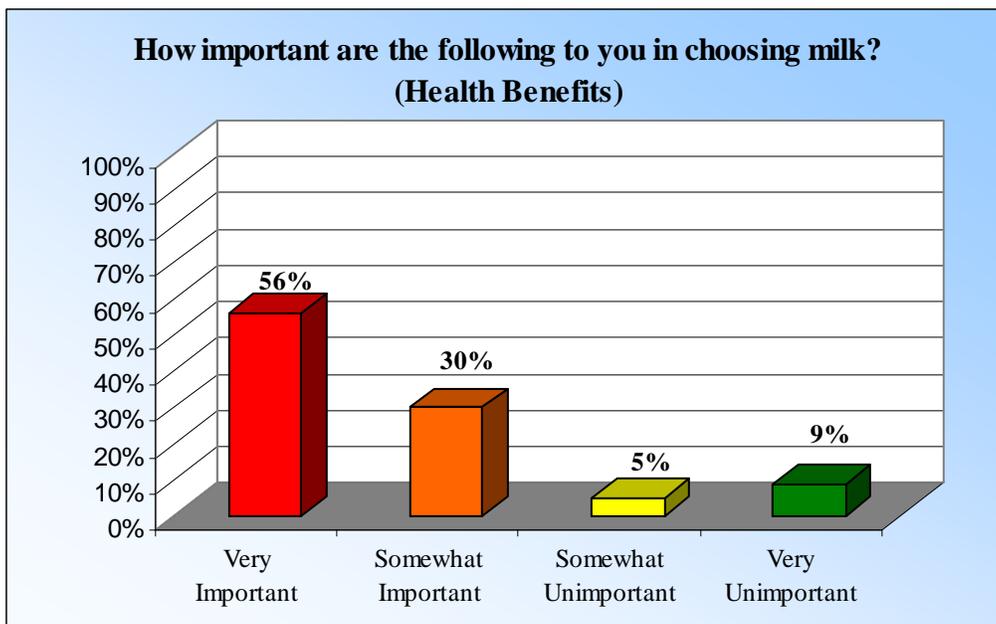


Thirty-nine percent of household shoppers said calories are very important when choosing milk, 27% said it is somewhat important, 13% said it is somewhat unimportant and 21% said it is very unimportant.

Question 10f: How important are the following to you in choosing milk?
(Health Benefits)

How important are the following to you in choosing milk? (Health Benefits)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Very Important	163	41.7	56.4	56.4
	Somewhat Important	87	22.3	30.1	86.5
	Somewhat Unimportant	13	3.3	4.5	91.0
	Very Unimportant	26	6.6	9.0	100.0
	Total	289	73.9	100.0	
	N/A	102	26.1		
Total		391	100.0		

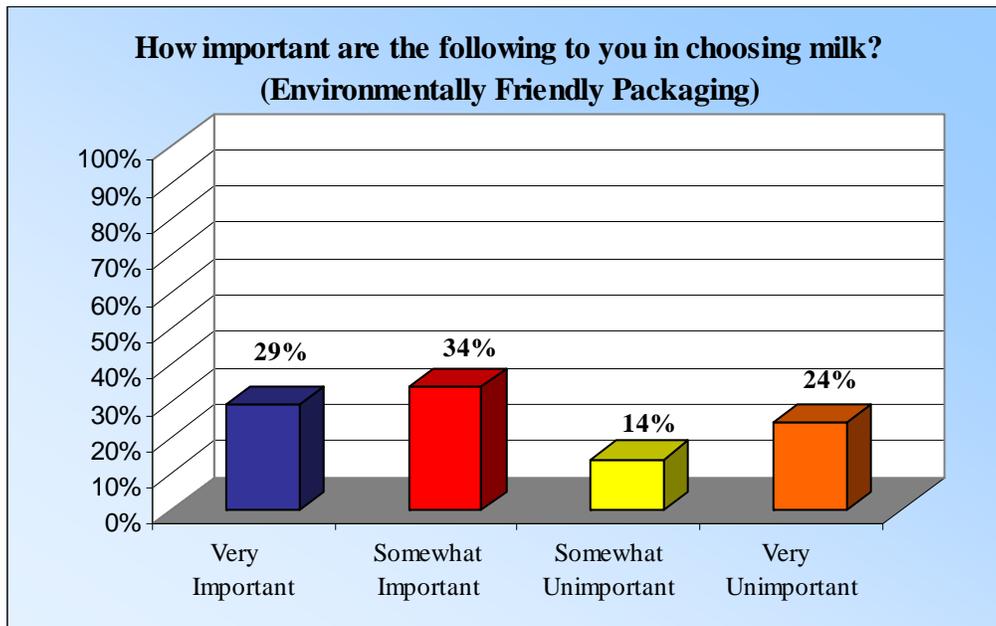


Fifty-six percent of household shoppers said health benefits are very important when choosing milk, 30% said it is somewhat important, 5% said it is somewhat unimportant and 9% said it is very unimportant.

Question 10g: How important are the following to you in choosing milk?
(Environmentally Friendly Packaging)

How important are the following to you in choosing milk? (Environmentally Friendly Packaging)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Very Important	83	21.2	28.7	28.7
	Somewhat Important	97	24.8	33.6	62.3
	Somewhat Unimportant	39	10.0	13.5	75.8
	Very Unimportant	70	17.9	24.2	100.0
	Total	289	73.9	100.0	
	N/A	102	26.1		
Total		391	100.0		

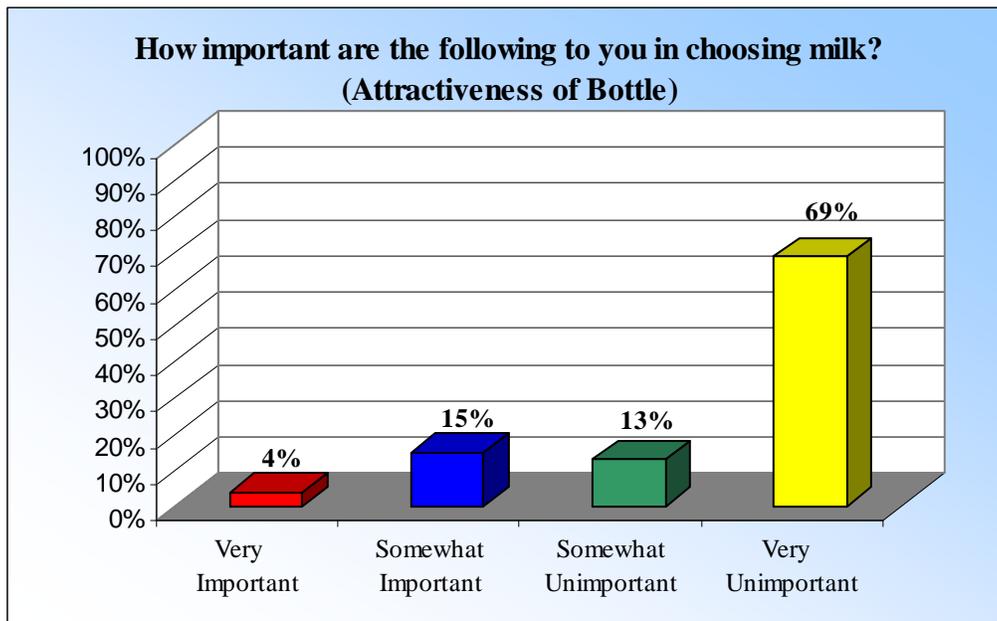


Twenty-nine percent of household shoppers said environmentally friendly packaging is very important when choosing milk, 34% said it is somewhat important, 14% said it is somewhat unimportant and 24% said it is very unimportant.

Question 10h: How important are the following to you in choosing milk?
(Attractiveness of Bottle)

How important are the following to you in choosing milk? (Attractiveness of Bottle)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Very Important	11	2.8	3.8	3.8
	Somewhat Important	42	10.7	14.5	18.3
	Somewhat Unimportant	38	9.7	13.1	31.5
	Very Unimportant	198	50.6	68.5	100.0
	Total	289	73.9	100.0	
	N/A	102	26.1		
Total		391	100.0		

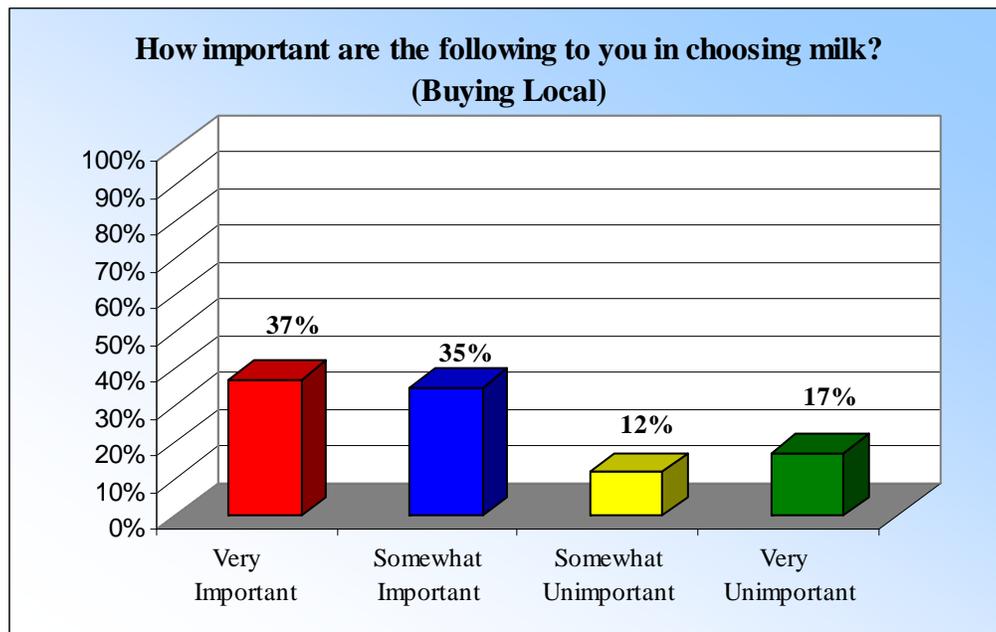


Four percent of household shoppers said the attractiveness of the bottle is very important when choosing milk, 15% said it is somewhat important, 13% said it is somewhat unimportant and 69% said it is very unimportant.

Question 10i: How important are the following to you in choosing milk?
(Buying Local)

How important are the following to you in choosing milk? (Buying Local)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Very Important	106	27.1	36.7	36.7
	Somewhat Important	100	25.6	34.6	71.3
	Somewhat Unimportant	34	8.7	11.8	83.0
	Very Unimportant	49	12.5	17.0	100.0
	Total	289	73.9	100.0	
	N/A	102	26.1		
Total		391	100.0		

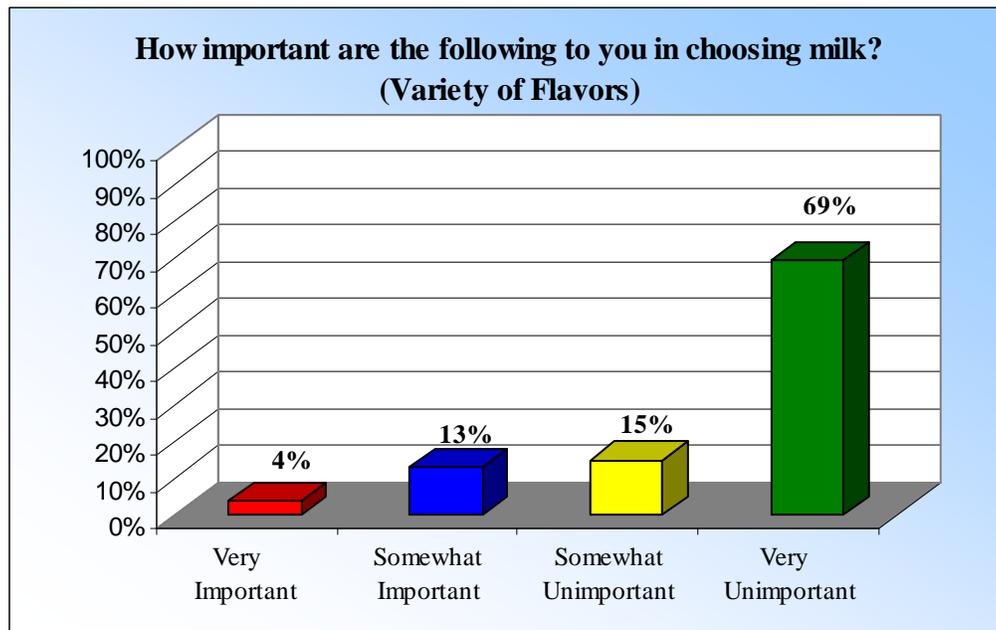


Thirty-seven percent of household shoppers said buying local is very important when choosing milk, 35% said it is somewhat important, 12% said it is somewhat unimportant and 17% said it is very unimportant.

Question 10j: How important are the following to you in choosing milk?
(Variety of Flavors)

How important are the following to you in choosing milk? (Variety of Flavors)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Very Important	10	2.6	3.5	3.5
	Somewhat Important	37	9.5	12.8	16.3
	Somewhat Unimportant	42	10.7	14.5	30.8
	Very Unimportant	200	51.2	69.2	100.0
	Total	289	73.9	100.0	
	N/A	102	26.1		
Total		391	100.0		

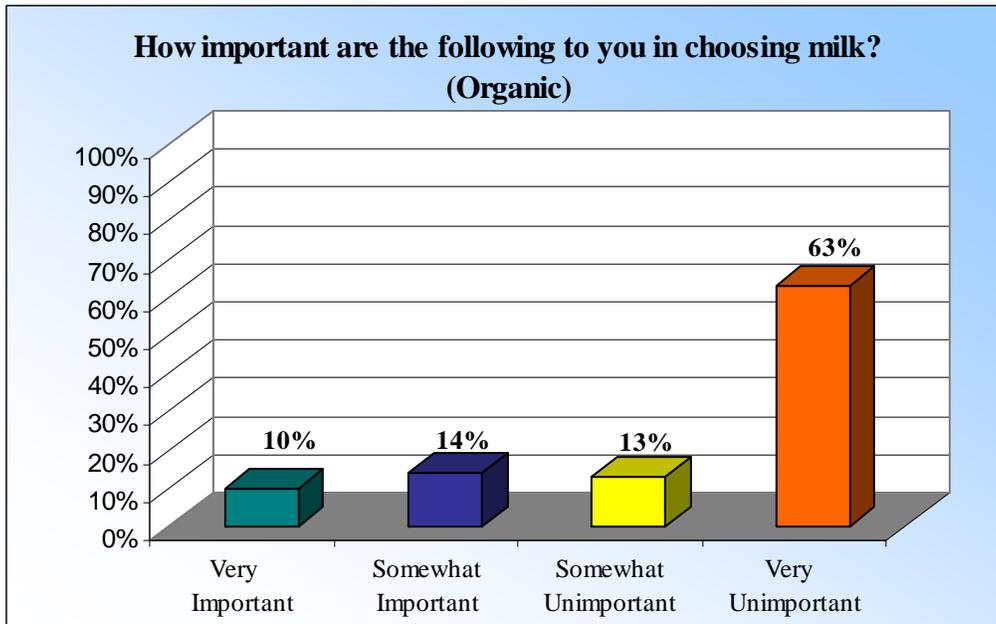


Four percent of household shoppers said the variety of flavors is very important when choosing milk, 13% said it is somewhat important, 15% said it is somewhat unimportant and 69% said it is very unimportant.

Question 10k: How important are the following to you in choosing milk?
(Organic)

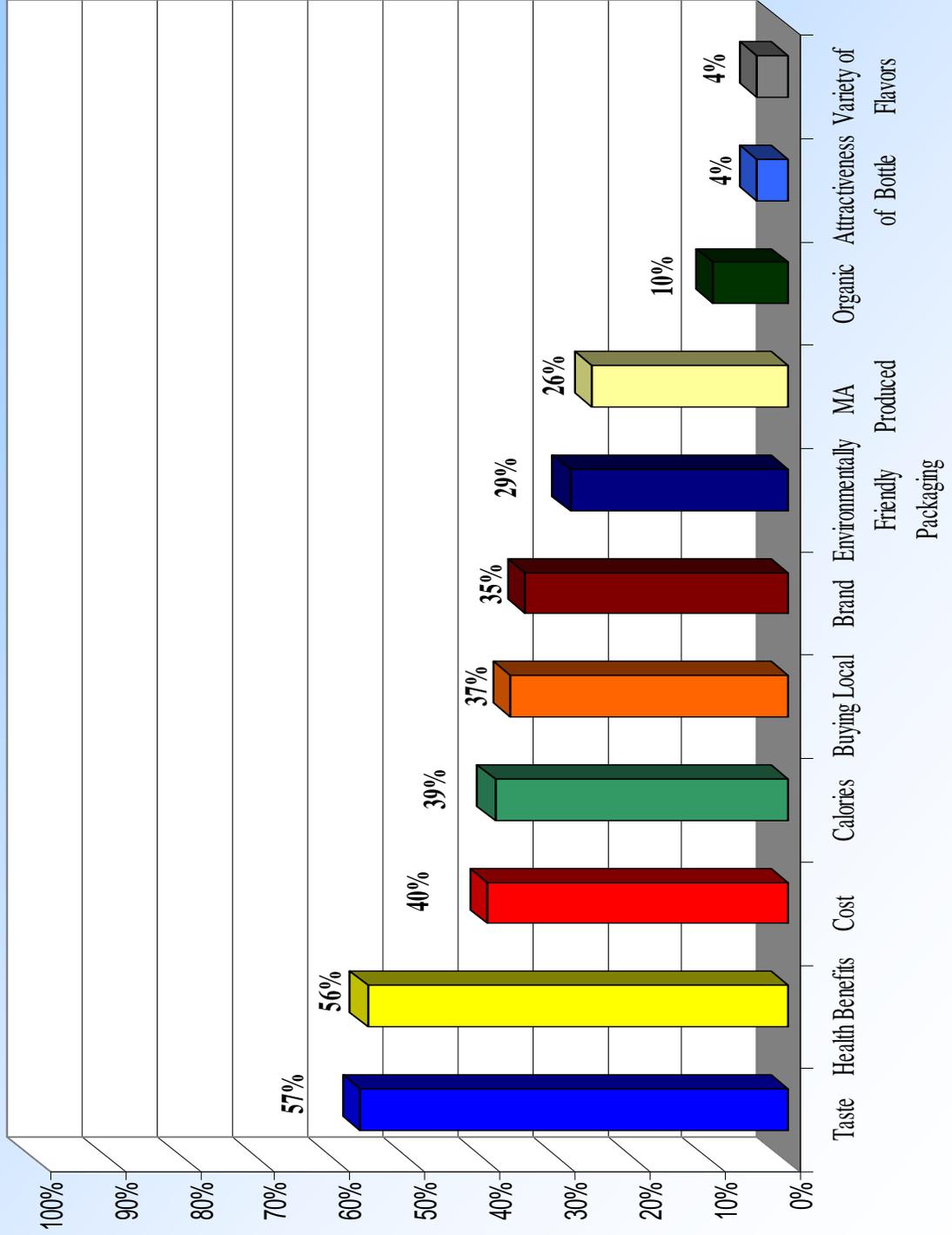
How important are the following to you in choosing milk? (Organic)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Very Important	29	7.4	10.0	10.0
	Somewhat Important	40	10.2	13.8	23.9
	Somewhat Unimportant	38	9.7	13.1	37.0
	Very Unimportant	182	46.5	63.0	100.0
	Total	289	73.9	100.0	
	N/A	102	26.1		
Total		391	100.0		



Ten percent of household shoppers said organic is very important when choosing milk, 14% said it is somewhat important, 13% said it is somewhat unimportant and 63% said it is very unimportant.

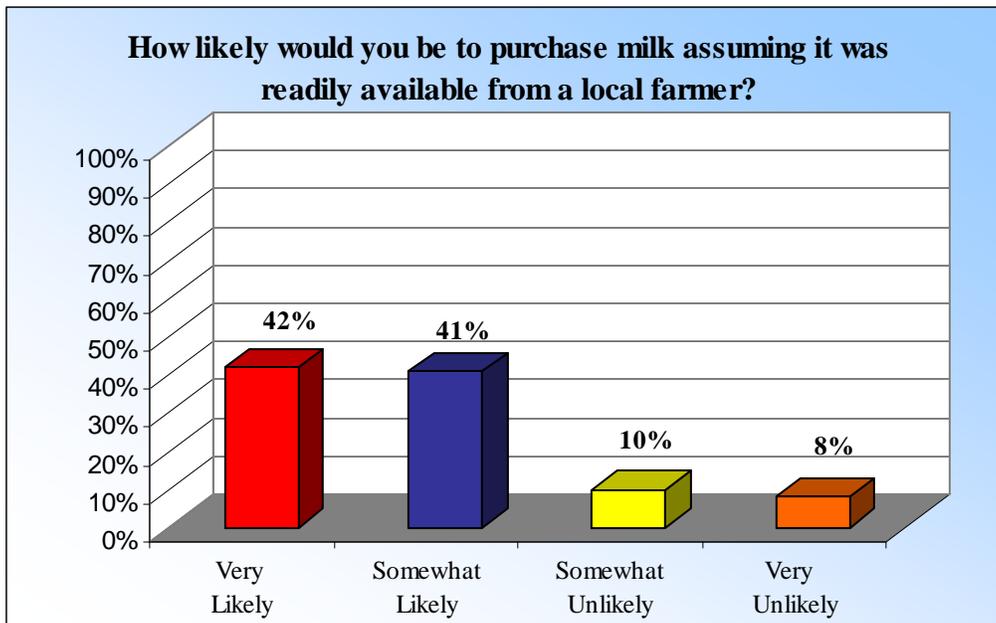
How important are the following to you in choosing milk? (% Very Important)



Question 11: How likely would you be to purchase milk assuming it was readily available from a local farmer?

How likely would you be to purchase milk assuming it was readily available from a local farmer?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Very Likely	121	30.9	41.9	41.9
	Somewhat Likely	117	29.9	40.5	82.4
	Somewhat Unlikely	29	7.4	10.0	92.4
	Very Unlikely	22	5.6	7.6	100.0
	Total	289	73.9	100.0	
	N/A	102	26.1		
Total		391	100.0		

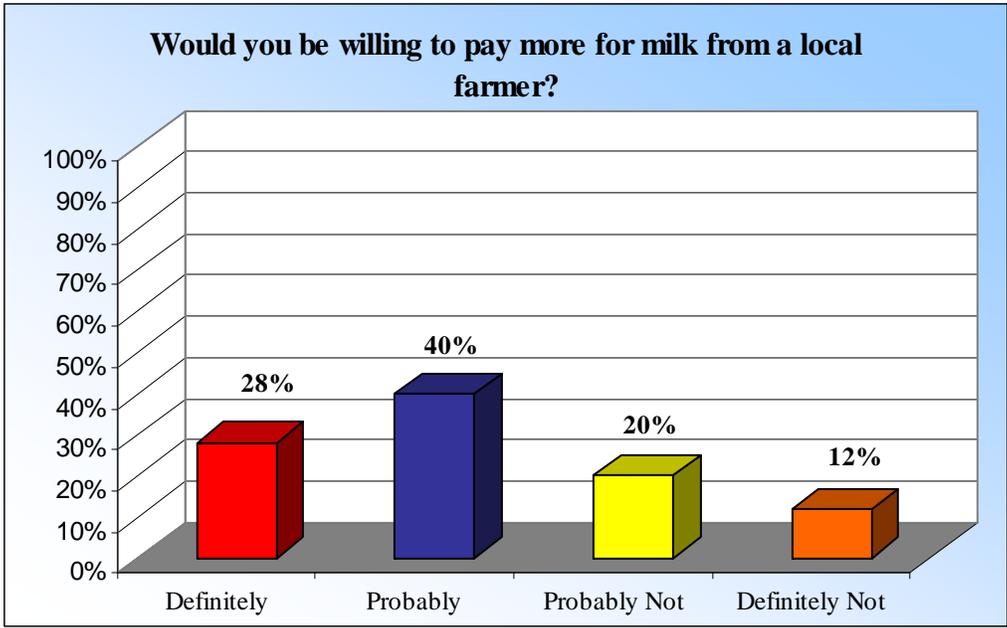


Forty-two percent of household shoppers said they would be very likely to purchase milk assuming it was readily available from a local farmer, 41% said they would be somewhat likely, 10% said they would be somewhat unlikely and 8% said they would be very unlikely to purchase milk from a local farmer.

Question 12: Would you be willing to pay more for milk from a local farmer?

Would you be willing to pay more for milk from a local farmer?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Definitely	81	20.7	28.0	28.0
	Probably	116	29.7	40.1	68.2
	Probably Not	57	14.6	19.7	87.9
	Definitely Not	35	9.0	12.1	100.0
	Total	289	73.9	100.0	
	N/A	102	26.1		
Total		391	100.0		

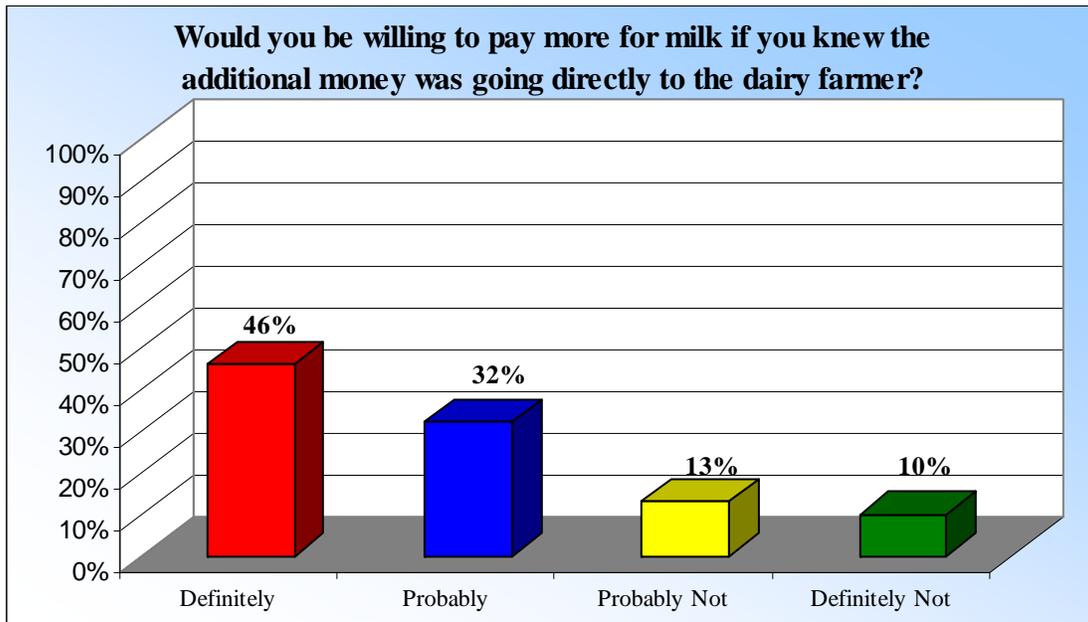


Twenty-eight percent of household shoppers said they would definitely pay more for milk from a local farmer, 40% said they would probably pay more, 20% said they would probably not pay more and 12% said they would definitely not pay more.

Question 13: Would you be willing to pay more for milk if you knew the additional money was going directly to the dairy farmer?

Would you be willing to pay more for milk if you knew the additional money was going directly to the dairy farmer?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Definitely	134	34.3	46.4	46.4
	Probably	91	23.3	31.5	77.9
	Probably Not	36	9.2	12.5	90.3
	Definitely Not	28	7.2	9.7	100.0
	Total	289	73.9	100.0	
	N/A	102	26.1		
Total		391	100.0		

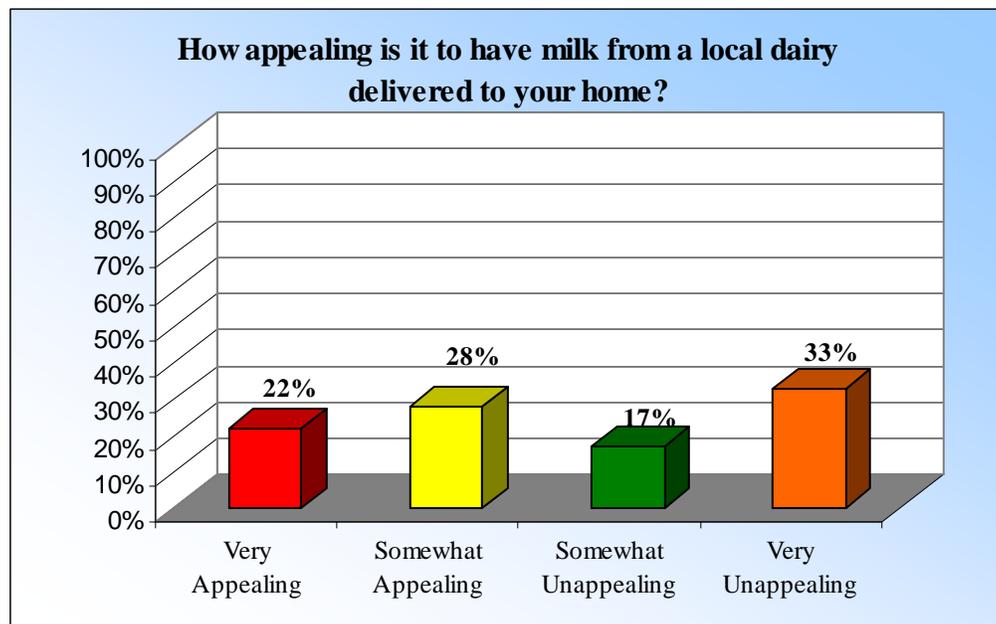


Forty-six percent of household shoppers said they would definitely pay more for milk if they knew the additional money was going directly to the dairy farmer, 32% said they would probably pay more, 13% said they would probably not pay more and 10% said they would definitely not pay more.

Question 14: How appealing is it to have milk from a local dairy delivered to your home?

How appealing is it to have milk from a local dairy delivered to your home?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Very Appealing	64	16.4	22.1	22.1
	Somewhat Appealing	82	21.0	28.4	50.5
	Somewhat Unappealing	49	12.5	17.0	67.5
	Very Unappealing	94	24.0	32.5	100.0
	Total	289	73.9	100.0	
	N/A	102	26.1		
Total		391	100.0		



Twenty-two percent of household shoppers said having milk from a local dairy delivered to their home is very appealing, 28% said it is somewhat appealing, 17% said it is somewhat unappealing and 33% said it is very unappealing.

Question 15: Do you have any suggestions for any new milk products?

<u>Response</u>	<u>Frequency</u>
Make it more natural-there are too many preservatives and additives, less hormones and chemicals	(4)
Milk in glass bottles	(2)
More accurate expiration dates	(2)
Offer goat dairy products	(2)
Add calcium and vitamin D	(1)
Better tasting lactose free milk	(1)
Coffee milk	(1)
Deliver in glass bottles	(1)
Drinkable buttermilk from local dairy farms	(1)
Drinkable yogurt	(1)
Go local	(1)
Healthy cows	(1)
Improve the cardboard carton opening	(1)
Locally made butter	(1)
Make cream cheese swirled with peanut butter	(1)
Make gallon size products in cardboard containers	(1)
Make quarts more available	(1)
Make raw milk available in stores	(1)
Make cardboard containers without a spout easier to open	(1)
Make tops easier to open	(1)
More humane treatment of animals	(1)

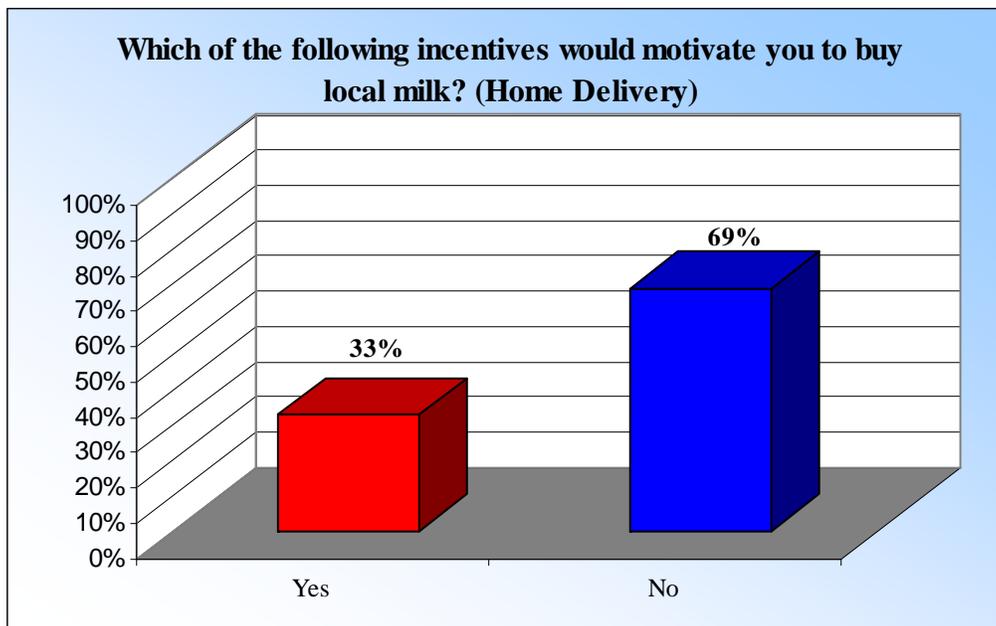
Question 15: Do you have any suggestions for any new milk products?

Offer flavored yogurt with less fat and more fresh milk	(1)
Offer more fat free chocolate milk	(1)
Offer more flavors in smaller sizes at the grocery store	(1)
Offer yogurt for children that is not “berry” flavored because many young children have berry allergies and there is not enough variety out there in go-gurt and smaller cup styles	(1)
Put the date the milk is packaged on the label	(1)
Put the location the milk was produced on the packaging	(1)
Stop pasteurization	(1)
The packaging	(1)
Yogurt with no sugar or plain with fruit	(1)
Total Responses	<hr/> 36

Question 16a: Which of the following incentives would motivate you to buy local milk?
(Home Delivery)

**Which of the following incentives would motivate you to buy local milk?
(Home Delivery)**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	96	24.6	33.2	33.2
	No	193	49.4	66.8	100.0
	Total	289	73.9	100.0	
	N/A	102	26.1		
Total		391	100.0		

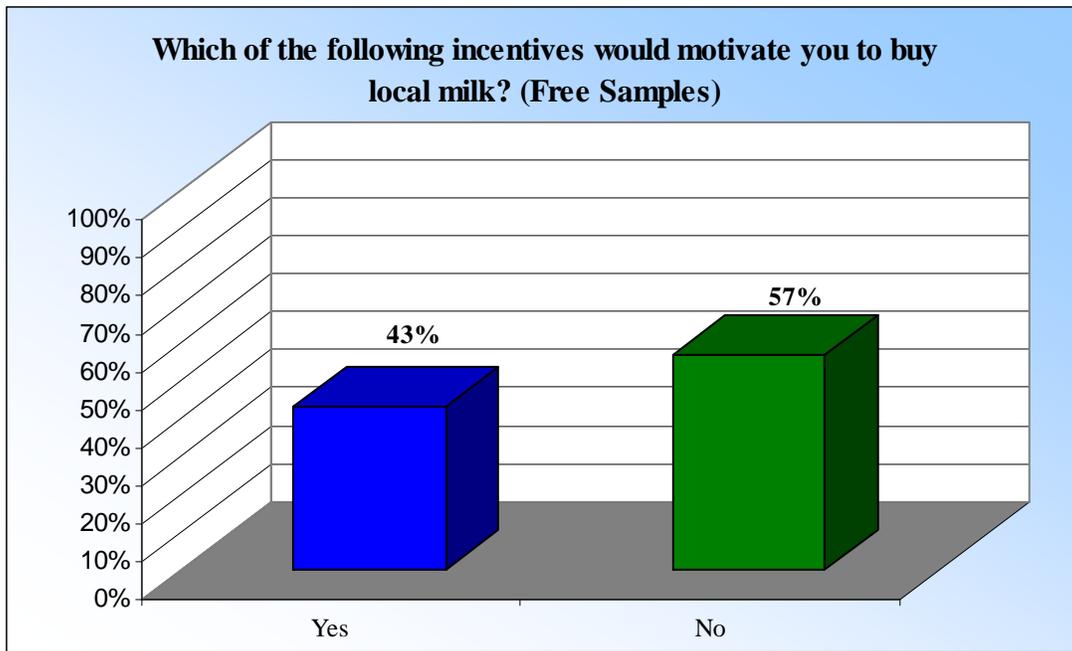


Thirty-three percent of household shoppers said home delivery would motivate them to buy local milk.

Question 16b: Which of the following incentives would motivate you to buy local milk?
(Free Samples)

Which of the following incentives would motivate you to buy local milk?
(Free Samples)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	123	31.5	42.6	42.6
	No	166	42.5	57.4	100.0
Total		289	73.9	100.0	
N/A		102	26.1		
Total		391	100.0		

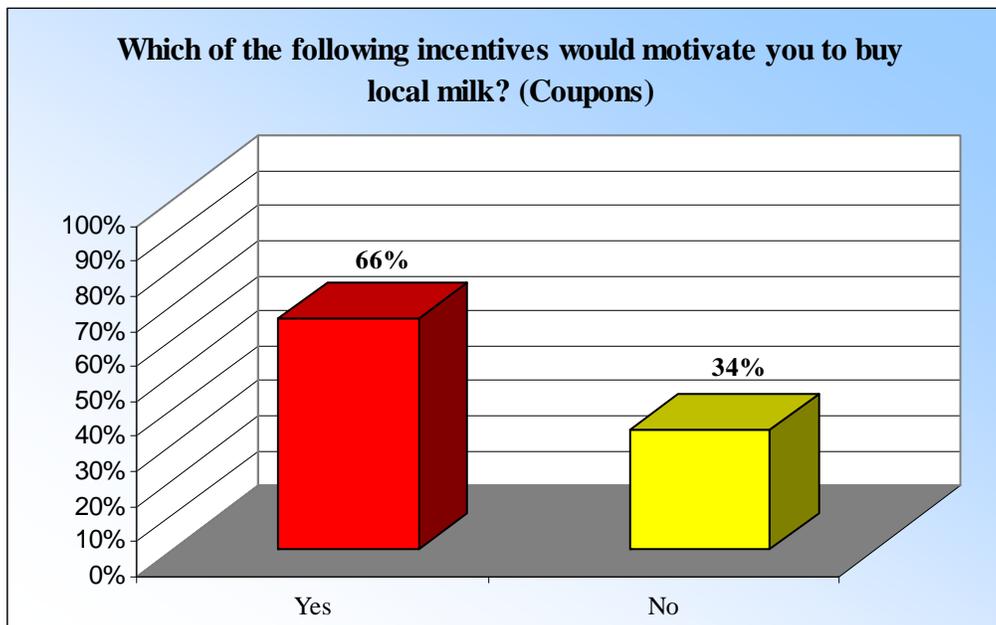


Forty-three percent of household shoppers said free samples would motivate them to buy local milk.

Question 16c: Which of the following incentives would motivate you to buy local milk?
(Coupons)

Which of the following incentives would motivate you to buy local milk?
(Coupons)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	192	49.1	66.4	66.4
	No	97	24.8	33.6	100.0
	Total	289	73.9	100.0	
	N/A	102	26.1		
Total		391	100.0		

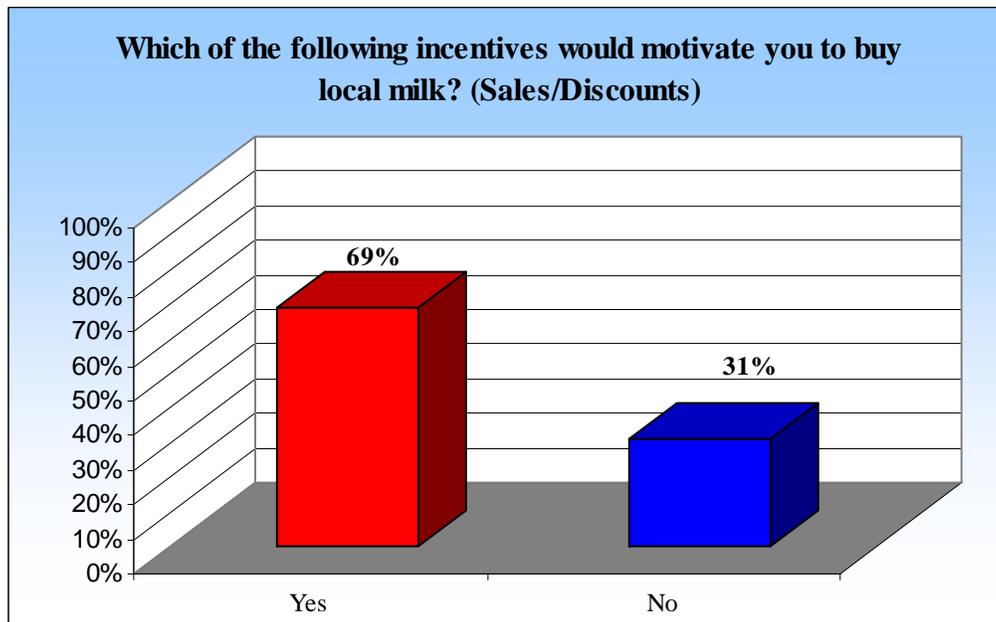


Sixty-six percent of household shoppers said coupons would motivate them to buy local milk.

Question 16d: Which of the following incentives would motivate you to buy local milk?
(Sales/Discounts)

Which of the following incentives would motivate you to buy local milk?
(Sales/Discounts)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	200	51.2	69.2	69.2
	No	89	22.8	30.8	100.0
	Total	289	73.9	100.0	
	N/A	102	26.1		
Total		391	100.0		

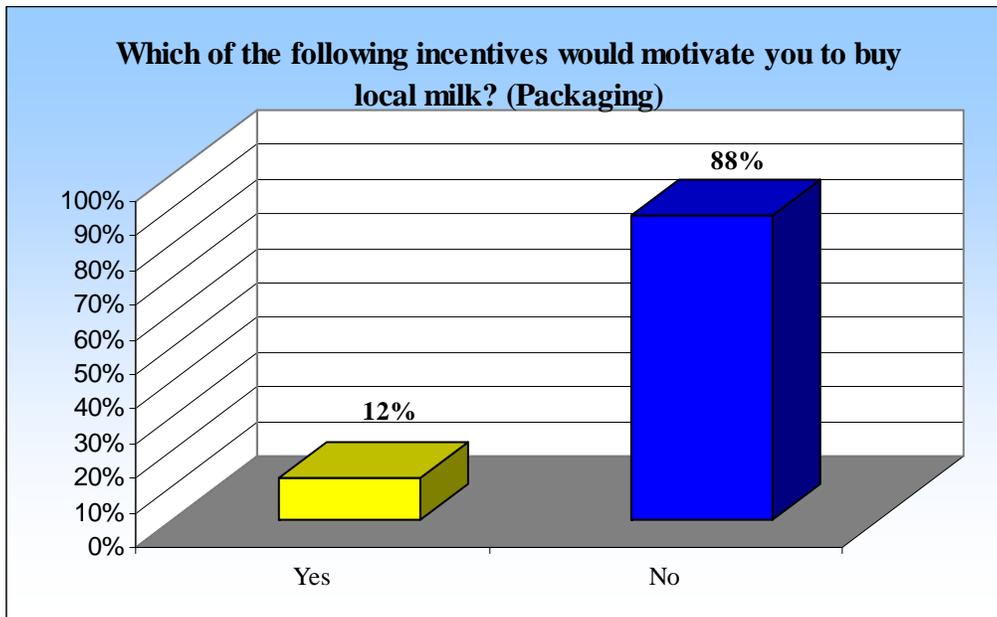


Sixty-nine percent of household shoppers said sales/discounts would motivate them to buy local milk.

Question 16e: Which of the following incentives would motivate you to buy local milk?
(Packaging)

**Which of the following incentives would motivate you to buy local milk?
(Packaging)**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	34	8.7	11.8	11.8
	No	255	65.2	88.2	100.0
	Total	289	73.9	100.0	
	N/A	102	26.1		
Total		391	100.0		

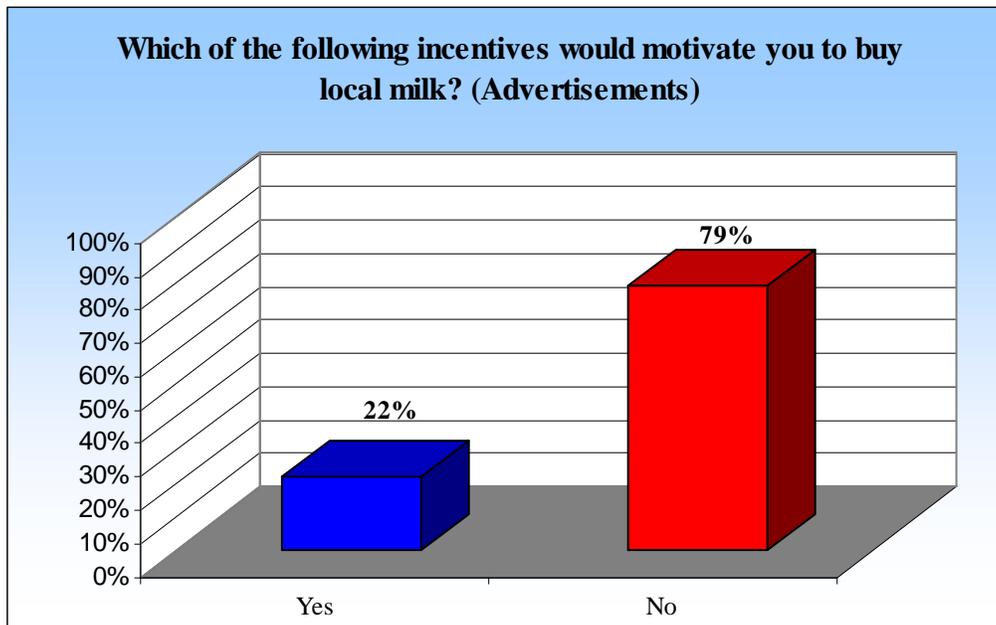


Twelve percent of household shoppers said the packaging would motivate them to purchase local milk.

Question 16f: Which of the following incentives would motivate you to buy local milk?
(Advertisements)

Which of the following incentives would motivate you to buy local milk?
(Advertisements)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	62	15.9	21.5	21.5
	No	227	58.1	78.5	100.0
	Total	289	73.9	100.0	
	N/A	102	26.1		
Total		391	100.0		



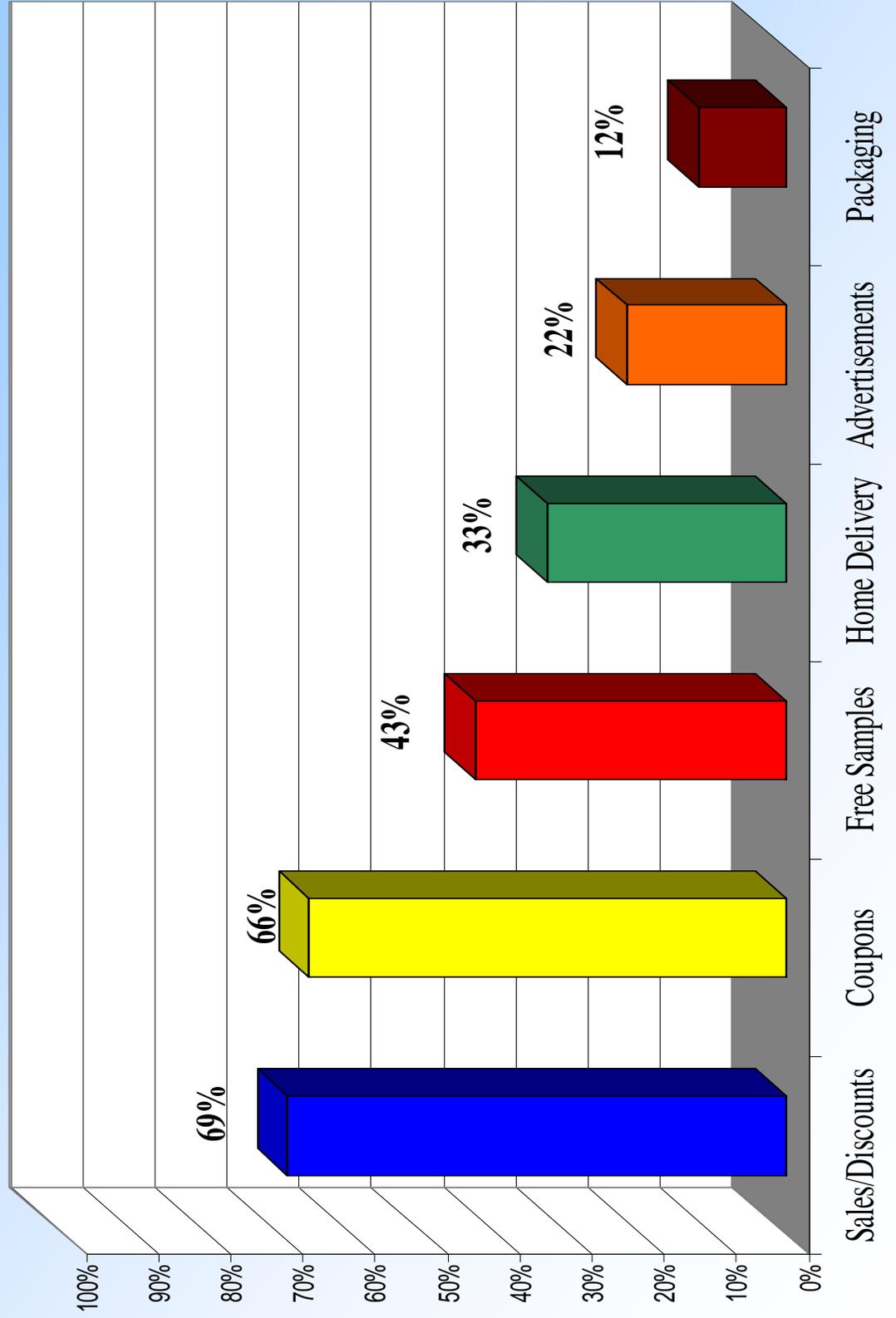
Twenty-two percent of household shoppers said advertisements would motivate them to buy local milk.

Question 16f: Which of the following incentives would motivate you to buy local milk?
(What Media Outlets?)

<u>Response</u>	<u>Frequency</u>
Newspaper	(24)
Television	(23)
Radio	(8)
Internet	(4)
Magazines	(2)
Blogs	(1)
Flyers	(1)
Word of Mouth	(1)
Total Responses³	64

³ Some respondents gave more than one answer.

Which of the following would motivate you to buy local milk? (% Yes)



Question 17: How many Massachusetts Dairy Farms do you think there are?

<u>Response</u>	<u>Frequency</u>
1-5	(51)
6-10	(47)
11-15	(25)
16-20	(29)
21-25	(21)
26-50	(54)
51-100	(58)
101-150	(9)
151-200	(21)
201-250	(2)
251-300	(9)
Over 300	(18)
Don't Know	(47)
Total Responses	<hr/> 391

Question 18: Can you name any?

<u>Response</u>	<u>Frequency</u>
No	(236)
Garelick Farm	(38)
Hood	(28)
Shaw Farm	(24)
Crescent Ridge	(11)
Peaceful Meadows	(8)
Whittier's	(8)
Richardson's	(7)
Bagma's	(6)
Arruda	(5)
Hanson Farm	(4)
High Lawn	(4)
Hornstra	(4)
McGovern Farm	(3)
Cumberland Farms	(3)
Jordan's	(2)
Pioneer	(2)
Stony Field	(2)
White's Dairy	(2)
Brox	(2)
Cooper's	(2)

Question 18: Can you name any?

Kimball	(2)
Oakhurst	(2)
Maple Line	(2)
Cabot Creamery	(1)
Chaser's	(1)
Delisandro's	(1)
Town Farms	(1)
Co-Ops	(1)
Colby Farm	(1)
Springhill Farm	(1)
Dairy Queen	(1)
Dave	(1)
Smith's	(1)
Pollard's	(1)
Dresser's	(1)
Drumland Farm	(1)
Wilson Farm	(1)
Evereh and Fletcher's Family Farms	(1)
Farm School	(1)
Bedford Dairy	(1)
West Lynn Creamery	(1)
Lynn	(1)

Question 18: Can you name any?

Guida	(1)
Smith	(1)
Asack's	(1)
Haverhill	(1)
Hofstra Farm	(1)
Allerd's	(1)
Monroe	(1)
Overlook	(1)
Anderson Farm	(1)
Ray Farm	(1)
Rider	(1)
Robinson's	(1)
India	(1)
Roger's	(1)
Farmland	(1)
Turner Farm	(1)
Inglesbee	(1)
Parley	(1)
Side Hill	(1)
Crystal Springs	(1)
Cooks	(1)
MountTobia	(1)

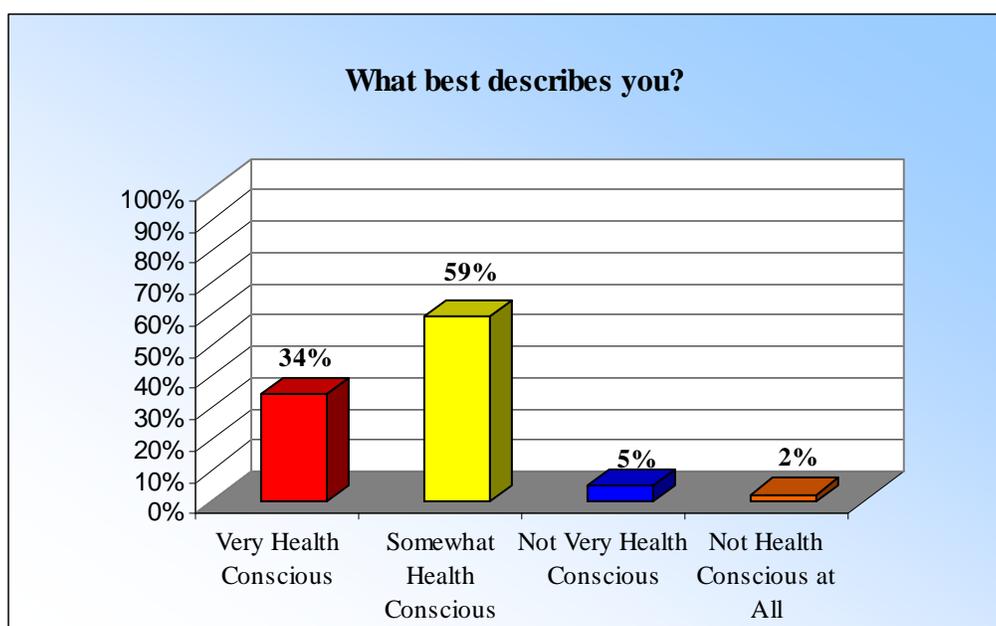
Question 18: Can you name any?

Spear's	(1)
Tores Pedro Dairy	(1)
Costa's	(1)
Kudo's	(1)
Tully Farm	(1)
Vermont	(1)
Total Responses⁴	<hr/> 428

⁴ Some respondents gave more than one answer.

Question 19: What best describes you?

		What best describes you?			
		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Very Health Conscious	133	34.0	34.0	34.0
	Somewhat Health Conscious	230	58.8	58.8	92.8
	Not Very Health Conscious	21	5.4	5.4	98.2
	Not Health Conscious At All	7	1.8	1.8	100.0
	Total	391	100.0	100.0	

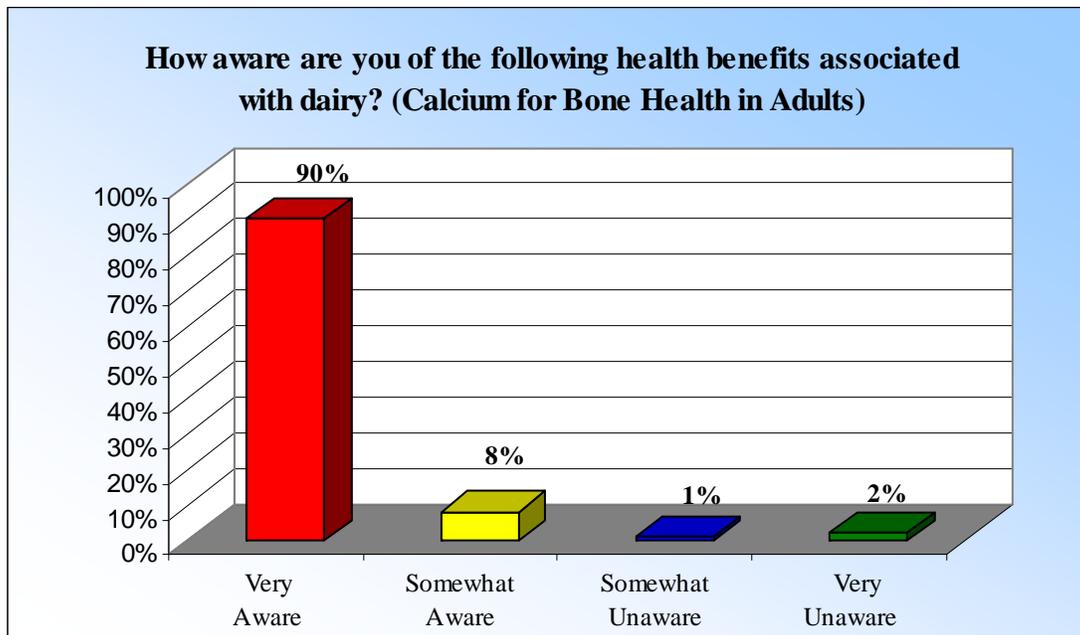


Thirty-four percent of respondents said they are very health conscious, 59% said they are somewhat health conscious, 5% said they are not very health conscious and 2% said they are not health conscious at all.

Question 20a: How aware are you of the following health benefits associated with dairy?
(Calcium for Bone Health in Adults)

How aware are you of the following health benefits associated with dairy?
(Calcium for Bone Health in Adults)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Very Aware	351	89.8	89.8	89.8
	Somewhat Aware	30	7.7	7.7	97.4
	Somewhat Unaware	3	.8	.8	98.2
	Very Unaware	7	1.8	1.8	100.0
	Total	391	100.0	100.0	

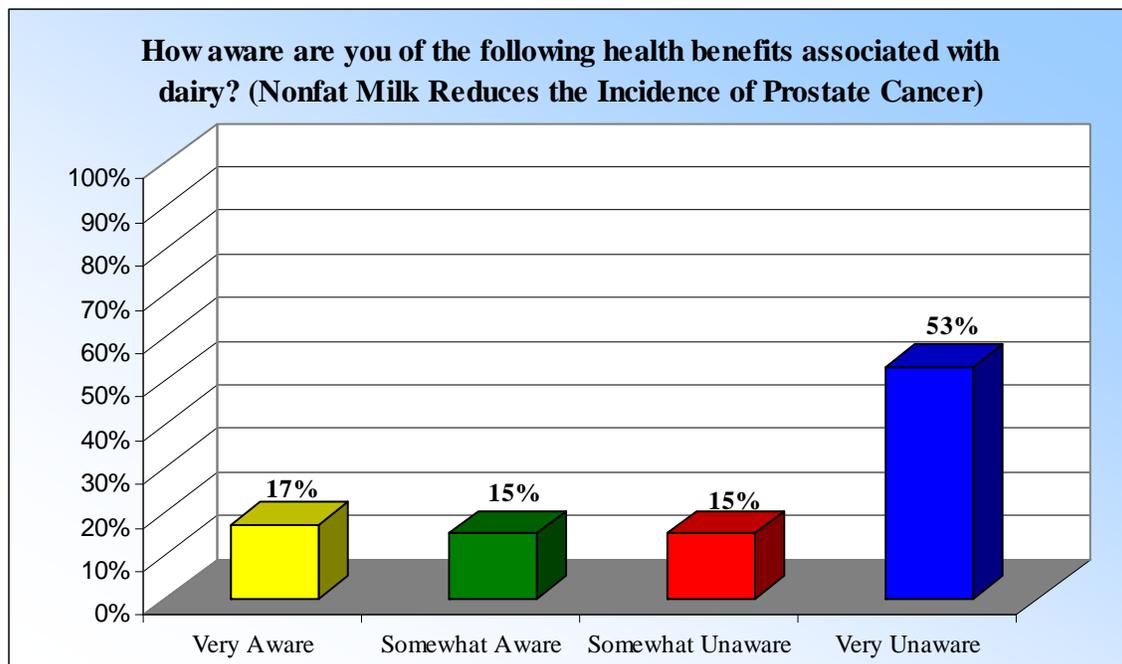


Ninety percent of respondents said they are very aware that dairy products help calcium for bone health in adults, 8% said they are somewhat aware, 1% said they are somewhat unaware and 2% said they are very unaware.

Question 20b: How aware are you of the following health benefits associated with dairy?
(Nonfat Milk Reduces Incidence of Prostate Cancer)

How aware are you of the following health benefits associated with dairy?
(Nonfat Milk Reduces Incidence of Prostate Cancer)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Very Aware	68	17.4	17.4	17.4
	Somewhat Aware	60	15.3	15.3	32.7
	Somewhat Unaware	57	14.6	14.6	47.3
	Very Unaware	206	52.7	52.7	100.0
	Total	391	100.0	100.0	

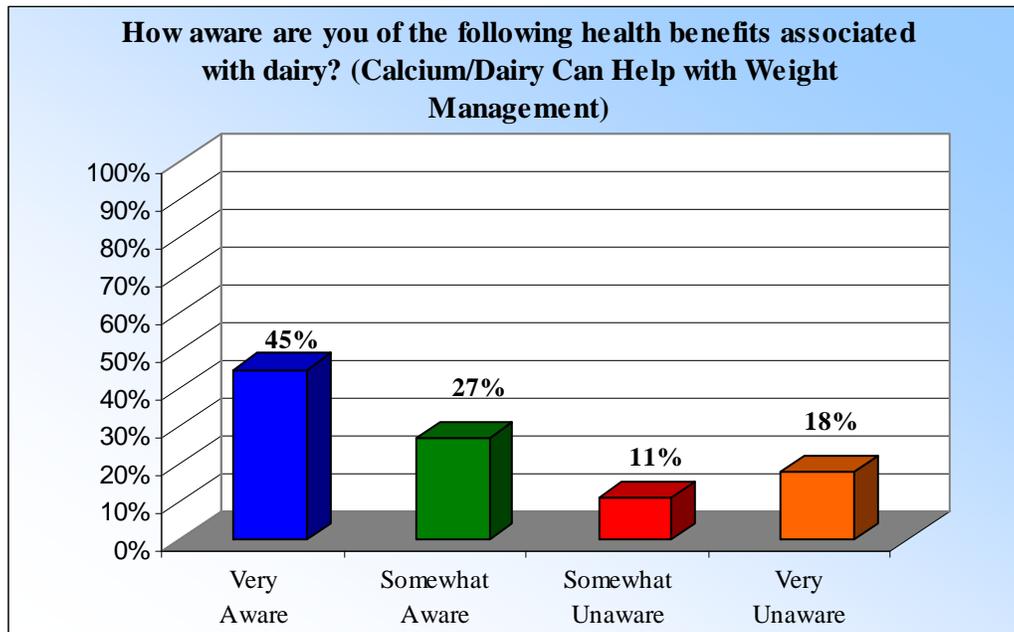


Seventeen percent of respondents said they are very aware that nonfat milk reduces the incidence of prostate cancer, 15% said they are somewhat aware, 15% said they are somewhat unaware and 53% said they are very unaware.

Question 20c: How aware are you of the following health benefits associated with dairy?
(Calcium/Dairy Can Help with Weight Management)

How aware are you of the following health benefits associated with dairy?
(Weight Management)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Very Aware	174	44.5	44.5	44.5
	Somewhat Aware	106	27.1	27.1	71.6
	Somewhat Unaware	41	10.5	10.5	82.1
	Very Unaware	70	17.9	17.9	100.0
	Total	391	100.0	100.0	

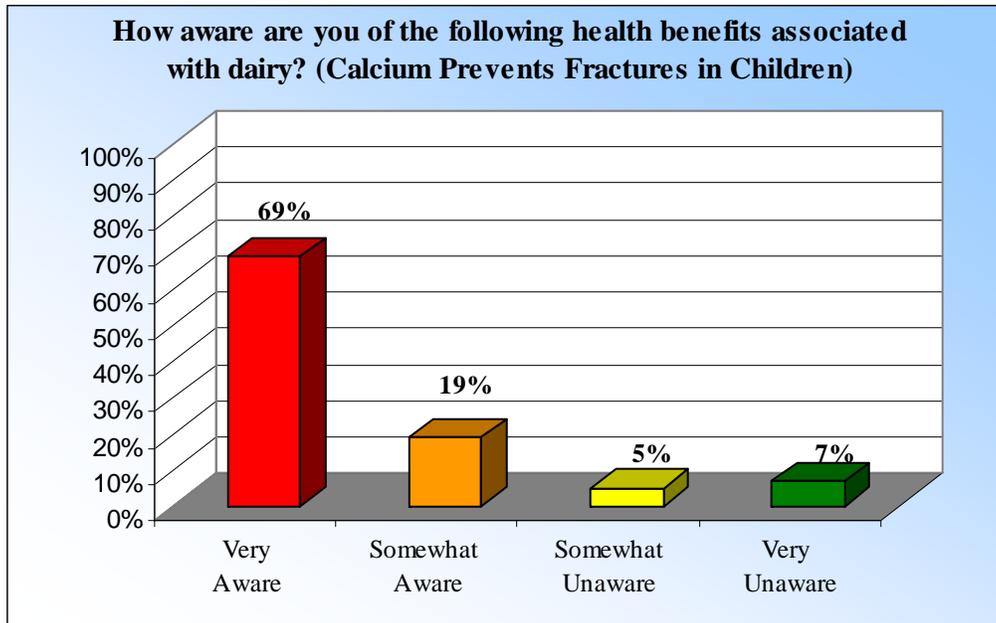


Forty-five percent of respondents are very aware that calcium/dairy can help with weight management, 27% said they are somewhat aware, 11% said they are somewhat unaware and 18% said they are very unaware.

Question 20d: How aware are you of the following health benefits associated with dairy?
(Calcium Prevents Fractures in Children)

How aware are you of the following health benefits associated with dairy?
(Fractures)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Very Aware	269	68.8	68.8	68.8
	Somewhat Aware	75	19.2	19.2	88.0
	Somewhat Unaware	18	4.6	4.6	92.6
	Very Unaware	29	7.4	7.4	100.0
	Total	391	100.0	100.0	

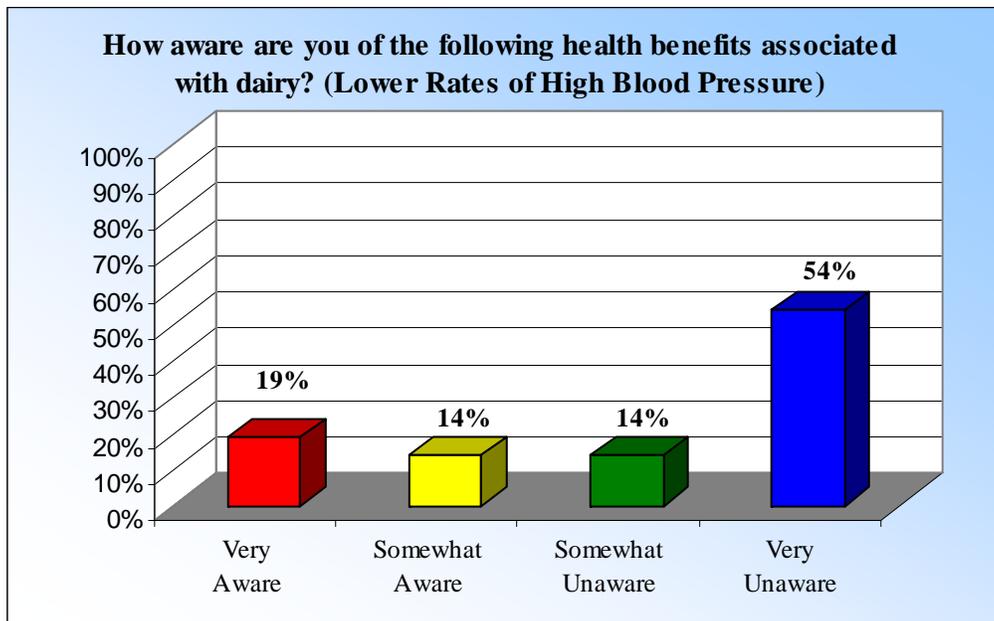


Sixty-nine percent of respondents are very aware that calcium prevents fractures in children, 19% are somewhat aware, 5% are somewhat unaware and 7% are very unaware.

Question 20e: How aware are you of the following health benefits associated with dairy?
(Lower Rates of High Blood Pressure)

How aware are you of the following health benefits associated with dairy?
(High Blood Pressure)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Very Aware	73	18.7	18.7	18.7
	Somewhat Aware	54	13.8	13.8	32.5
	Somewhat Unaware	54	13.8	13.8	46.3
	Very Unaware	210	53.7	53.7	100.0
	Total	391	100.0	100.0	

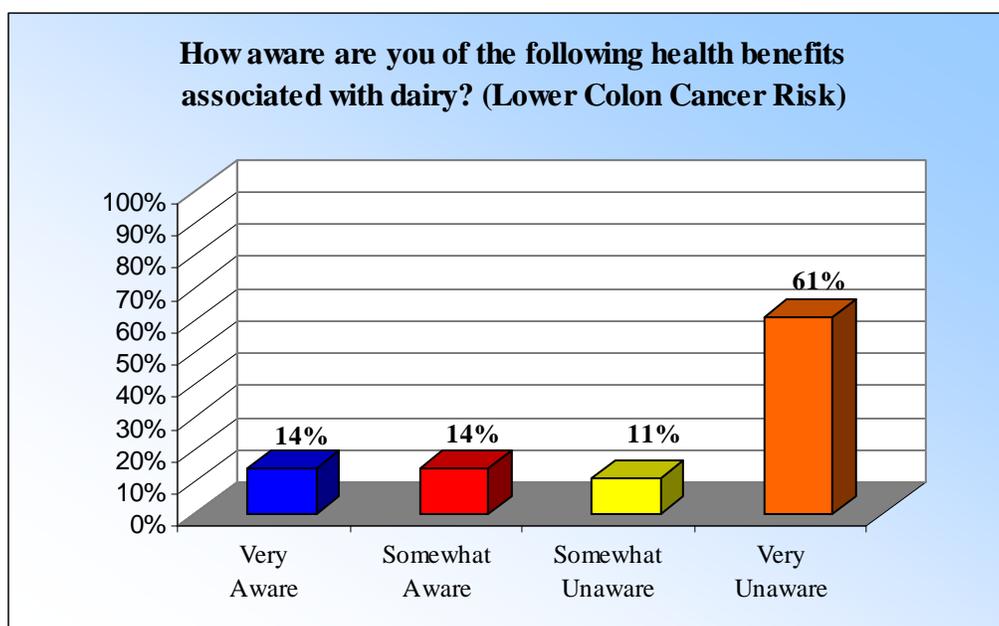


Nineteen percent of respondents are very aware that dairy products lower rates of high blood pressure, 14% are somewhat aware, 14% are somewhat unaware and 54% are very unaware.

Question 20f: How aware are you of the following health benefits associated with dairy?
(Lower Colon Cancer Risk)

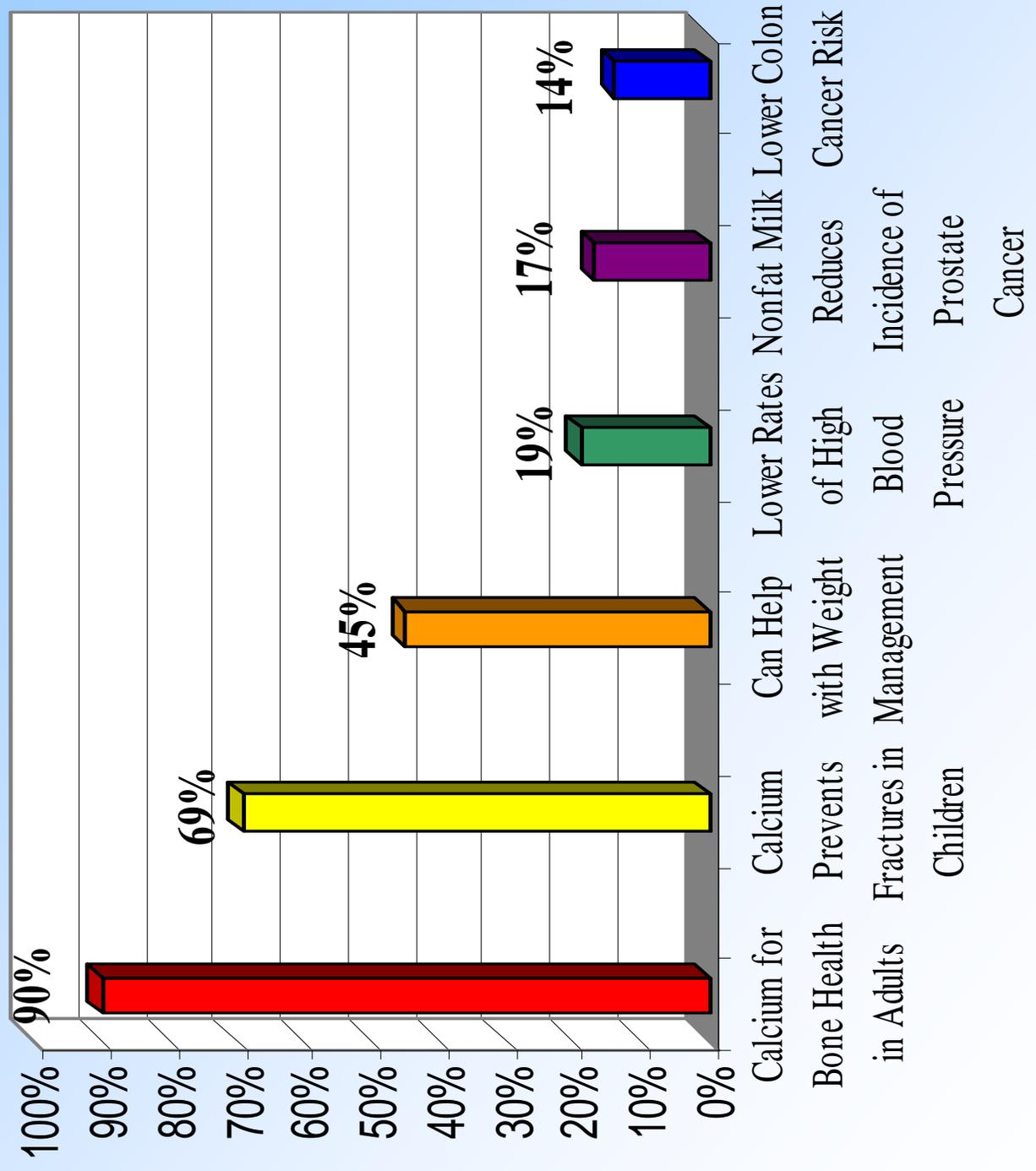
How aware are you of the following health benefits associated with dairy?
(Colon Cancer)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Very Aware	53	13.6	13.6	13.6
	Somewhat Aware	54	13.8	13.8	27.4
	Somewhat Unaware	44	11.3	11.3	38.6
	Very Unaware	240	61.4	61.4	100.0
	Total	391	100.0	100.0	



Fourteen percent of respondents are very aware that dairy products help lower colon cancer risk, 14% are somewhat aware, 11% are somewhat unaware and 61% are very unaware.

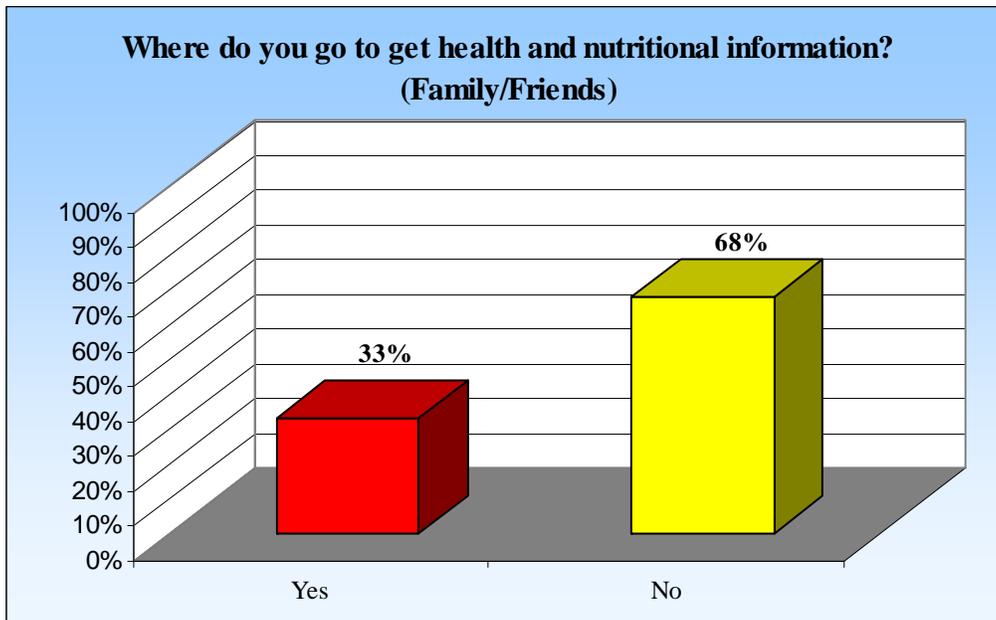
How aware are you of the following health benefits associated with dairy? (% Very Aware)



Question 21a: Where do you go to get health and nutritional information?
(Family/Friends)

Where do you go to get health and nutritional information? (Family/Friends)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	127	32.5	32.5	32.5
	No	264	67.5	67.5	100.0
	Total	391	100.0	100.0	

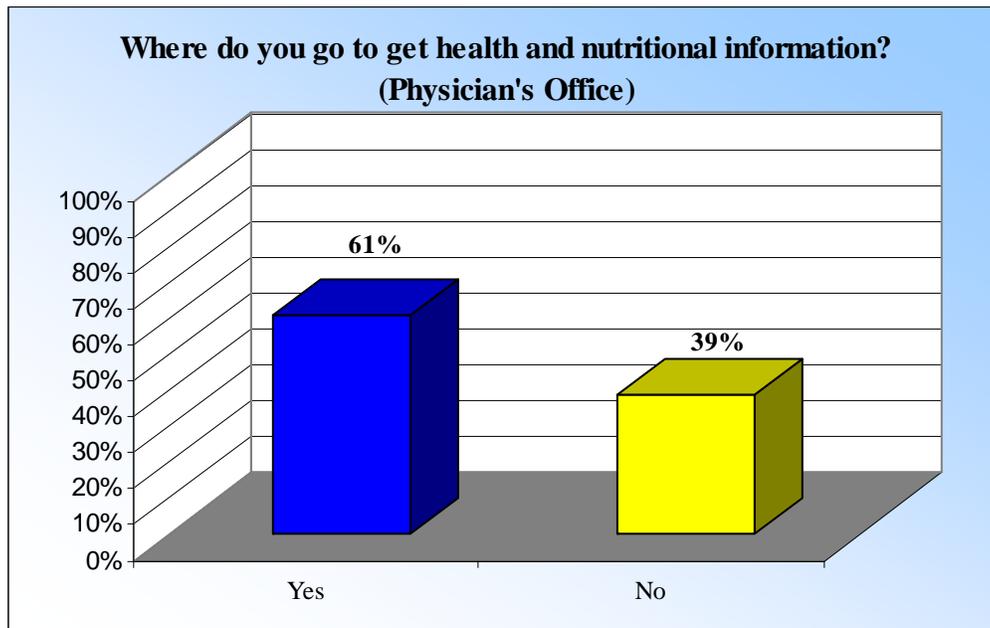


Thirty-three percent of respondents get health and nutritional information from family/friends.

Question 21b: Where do you go to get health and nutritional information?
(Physician's Office)

Where do you go to get health and nutritional information?
(Physician's Office)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	239	61.1	61.1	61.1
	No	152	38.9	38.9	100.0
	Total	391	100.0	100.0	

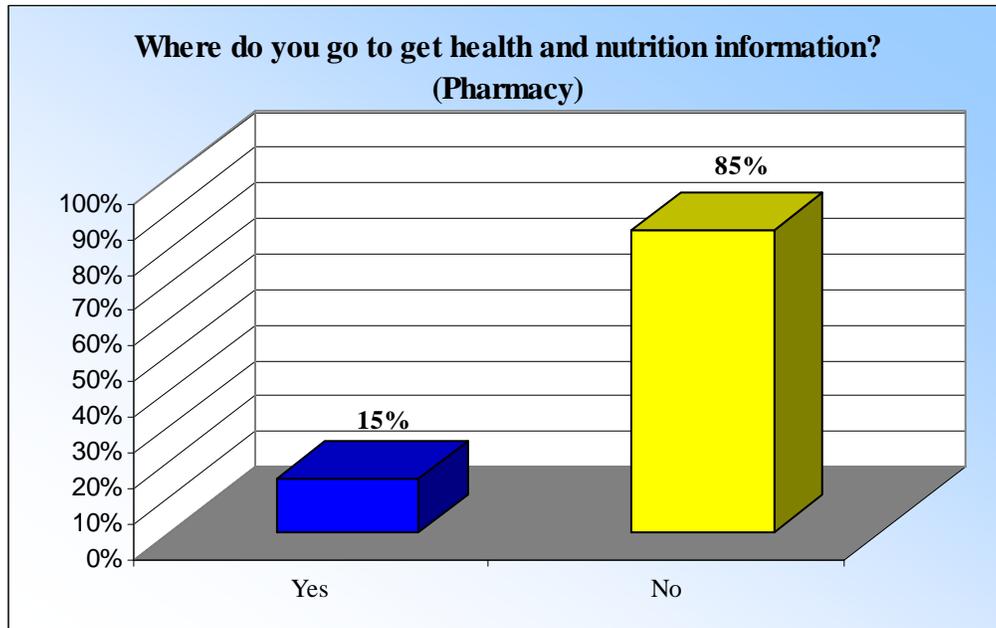


Sixty-one percent of respondents get health and nutritional information from a physician's office.

Question 21c: Where do you go to get health and nutritional information?
(Pharmacy)

**Where do you go to get health and nutritional information?
(Pharmacy)**

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid Yes	60	15.3	15.3	15.3
No	331	84.7	84.7	100.0
Total	391	100.0	100.0	

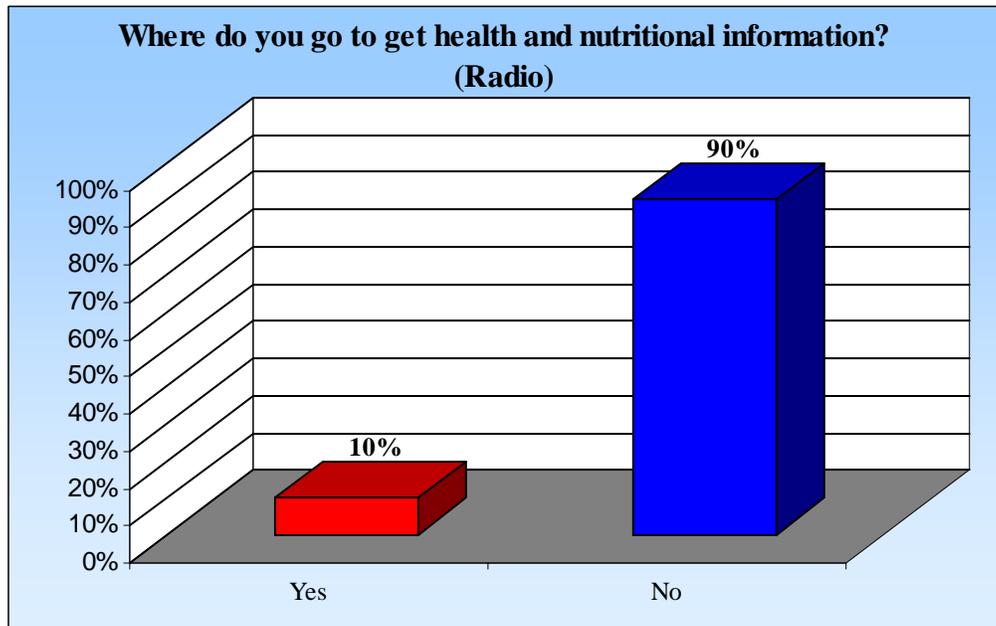


Fifteen percent of respondents said they get health and nutritional information from a pharmacy.

Question 21d: Where do you go to get health and nutritional information?
(Radio)

Where do you go to get health and nutritional information?
(Radio)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	40	10.2	10.2	10.2
	No	351	89.8	89.8	100.0
	Total	391	100.0	100.0	

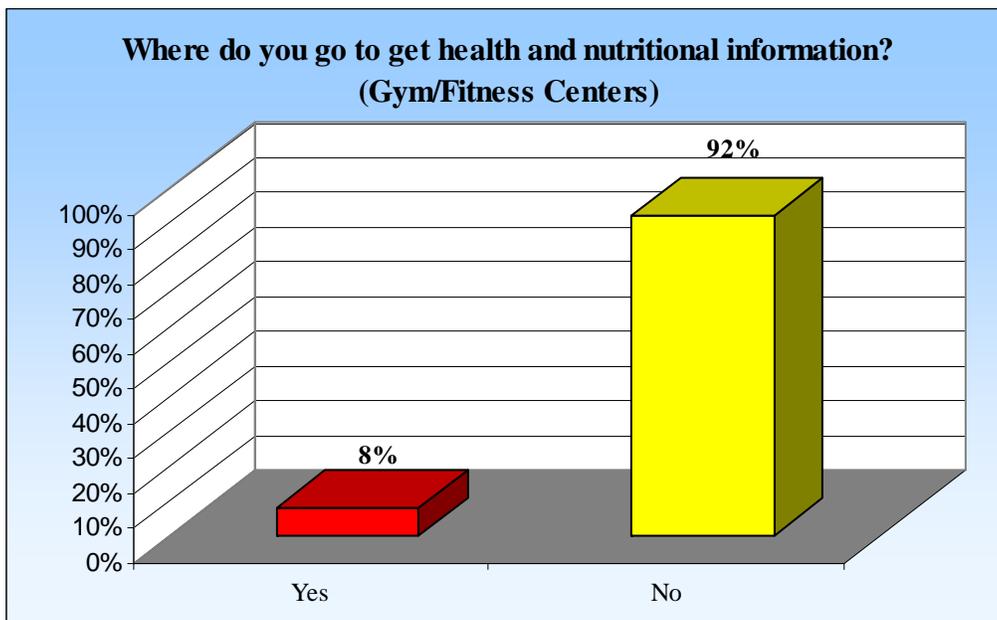


Ten percent of respondents said they get health and nutritional information from the radio.

Question 21e: Where do you go to get health and nutritional information?
(Gym/Fitness Centers)

Where do you go to get health and nutritional information?
(Gym / Fitness)

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid Yes	32	8.2	8.2	8.2
No	359	91.8	91.8	100.0
Total	391	100.0	100.0	

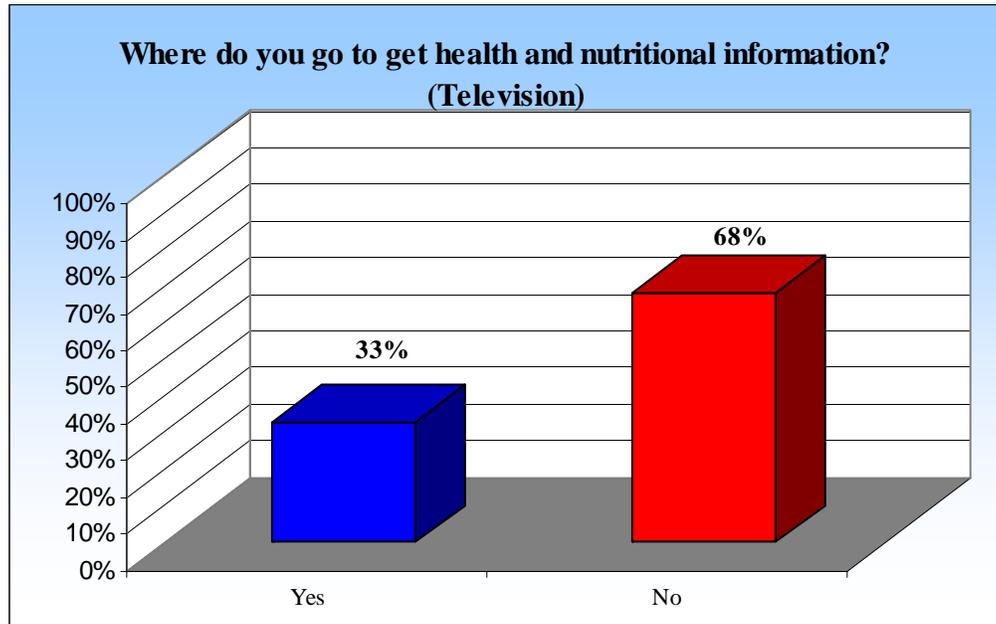


Eight percent of respondents said that they get health and nutritional information from a gym or fitness center.

Question 21f: Where do you go to get health and nutritional information?
(Television)

**Where do you go to get health and nutritional information?
(Television)**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	127	32.5	32.5	32.5
	No	264	67.5	67.5	100.0
	Total	391	100.0	100.0	

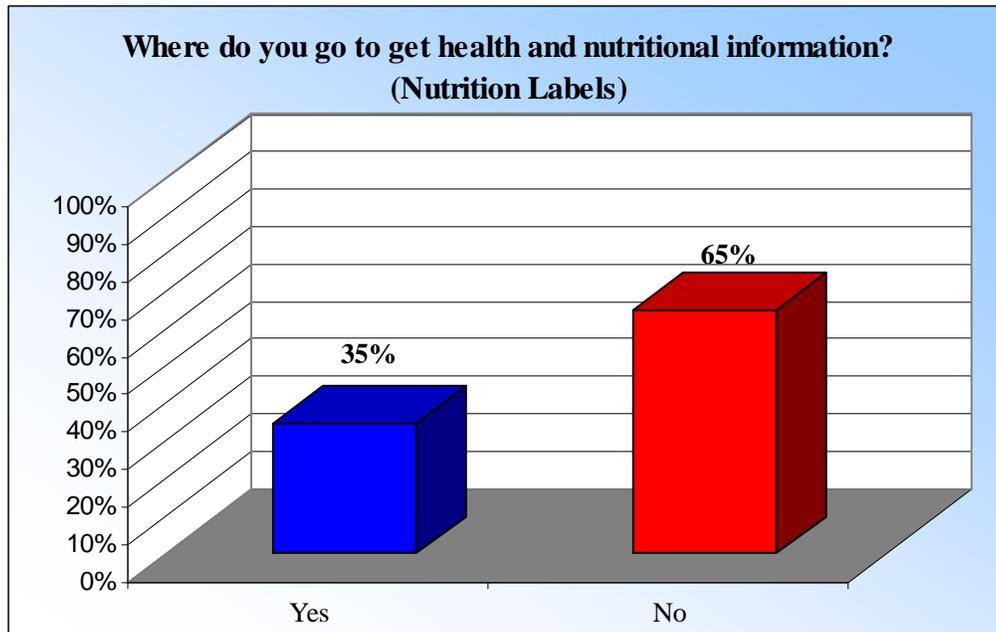


Thirty-three percent of respondents said that they get health and nutritional information from television.

Question 21g: Where do you go to get health and nutritional information?
(Nutrition Labels)

Where do you go to get health and nutritional information?
(Nutrition Labels)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	137	35.0	35.0	35.0
	No	254	65.0	65.0	100.0
	Total	391	100.0	100.0	

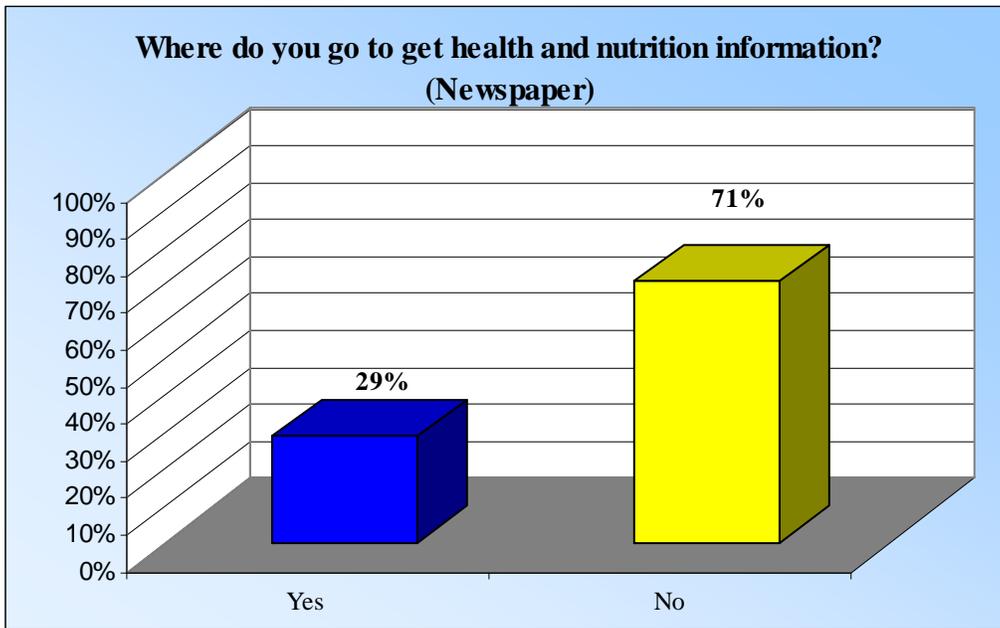


Thirty-five percent of respondents said that they get health and nutritional information from nutrition labels.

Question 21h: Where do you go to get health and nutritional information?
(Newspaper)

**Where do you go to get health and nutritional information?
(Newspaper)**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	112	28.6	28.6	28.6
	No	279	71.4	71.4	100.0
	Total	391	100.0	100.0	

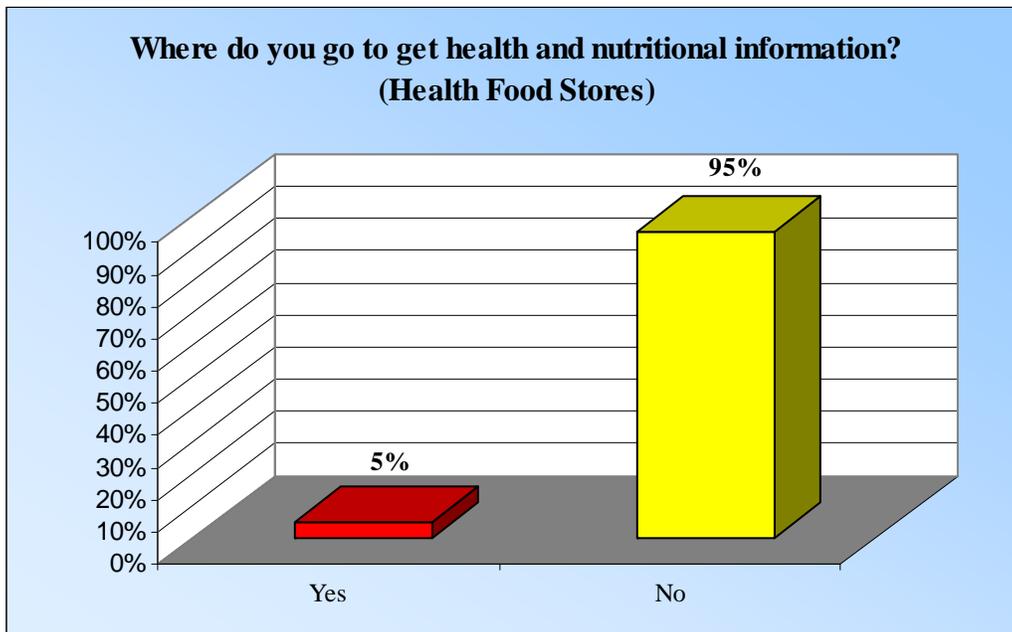


Twenty-nine percent of respondents said that they get health and nutritional information from the newspaper.

Question 21i: Where do you go to get health and nutritional information?
(Health Food Stores)

**Where do you go to get health and nutritional information?
(Health Food Stores)**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	21	5.4	5.4	5.4
	No	370	94.6	94.6	100.0
	Total	391	100.0	100.0	



Five percent of respondents said that they get health and nutritional information from health food stores.

Question 21j: Which health food stores do you get your health and nutritional information from?

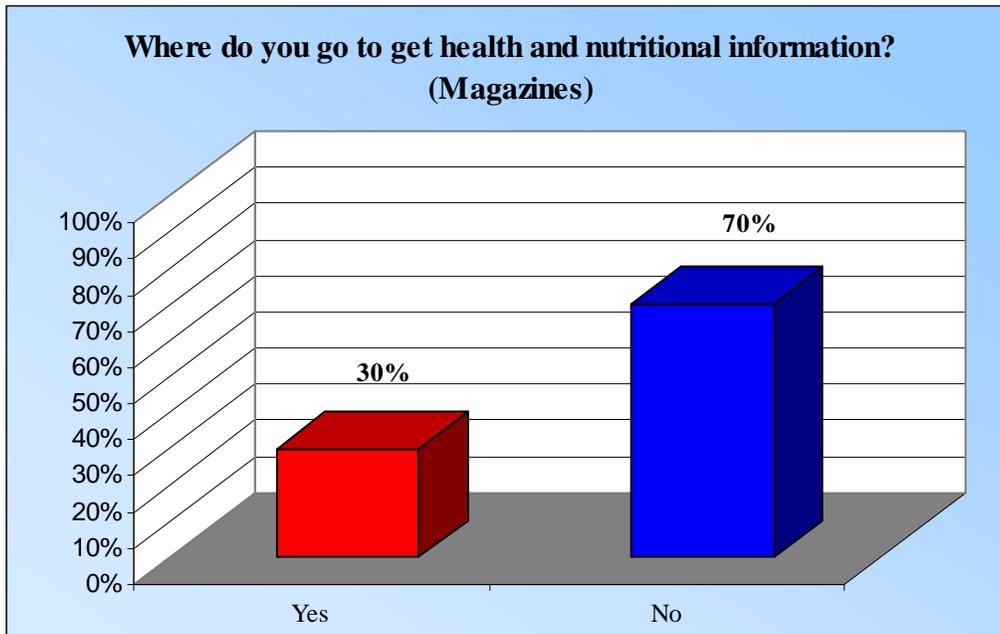
<u>Response</u>	<u>Frequency</u>
Whole Foods	(10)
GNC	(4)
Trader Joe's	(3)
Vitamin Shop	(3)
Co-Op Farm	(1)
Vitamin World	(1)
Total Responses⁵	<hr style="width: 100px; margin-left: auto; margin-right: 0;"/> 22

⁵ Some respondents gave more than one answer.

Question 21k: Where do you go to get health and nutritional information?
(Magazines)

**Where do you go to get health and nutritional information?
(Magazines)**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	119	30.4	30.4	30.4
	No	272	69.6	69.6	100.0
	Total	391	100.0	100.0	



Thirty percent of respondents said that they get health and nutritional information from magazines.

Question 211: Which magazine(s) do you get your health and nutritional information from?

<u>Response</u>	<u>Frequency</u>
Prevention	(13)
Good Housekeeping	(12)
Women's Day	(10)
Health Magazines	(10)
Fitness	(7)
Family Circle	(6)
Men's Fitness	(4)
Newsweek	(4)
Self	(3)
Cosmopolitan	(3)
Ladies' Home Journal	(3)
Nutrition Action Newsletter	(3)
Shape	(3)
Time	(2)
Women's Health	(2)
Women's Magazines	(2)
Consumer Report on Health	(2)
Cooking Light	(2)
Oprah	(2)
Martha Stewart	(2)

<p>Question 211: Which magazine(s) do you get your health and nutritional information from?</p>

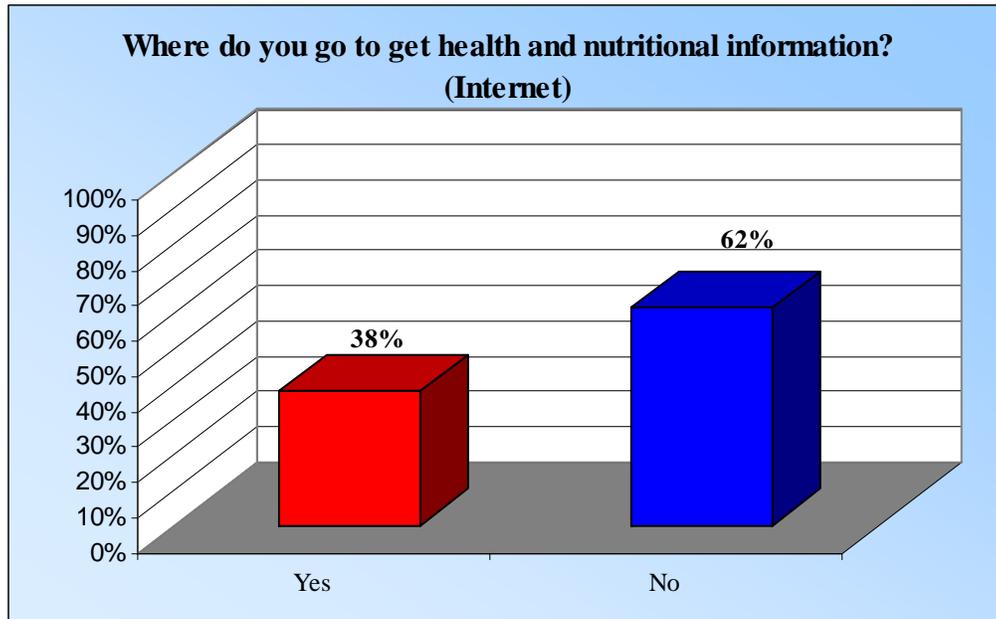
Readers Digest	(2)
Better Homes & Gardens	(1)
Body & Soul	(1)
Country Living	(1)
Better Health	(1)
Eating Well	(1)
Economist	(1)
Food Magazines	(1)
Harvard Pilgrim	(1)
Traditional Homes	(1)
Men's Health	(1)
Miranda	(1)
Architectural Digest	(1)
Hospital Magazine	(1)
People	(1)
Principle	(1)
Saturday Evening Post	(1)
Remedy	(1)
Mail	(1)
Food & Vitamin Catalogs	(1)
Total Responses⁶	116

⁶ Some respondents gave more than one answer.

Question 21m: Where do you go to get health and nutritional information?
(Internet)

Where do you go to get health and nutritional information?
(Internet)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	147	37.6	37.6	37.6
	No	244	62.4	62.4	100.0
	Total	391	100.0	100.0	



Thirty-eight percent of respondents said they get health and nutritional information from the Internet.

Question 21n: Which internet site(s) do you get your health and nutritional information from?

<u>Response</u>	<u>Frequency</u>
WebMD	(46)
Google	(30)
Mayo Clinic	(3)
Search Engines	(2)
Harvard Health	(2)
Wikipedia	(2)
Weight Watchers	(2)
AOL Health	(1)
Baby Center	(1)
AskMD	(1)
Health Wise Knowledge Base	(1)
iVillage	(1)
MyPyramid	(1)
Nutralite.com	(1)
Online Newspapers	(1)
Parent Center	(1)
Parenting and adoption sites	(1)
Real Age	(1)
Dr. Whale	(1)
MedHealth	(1)
Partner's Health	(1)

Question 21n: Which internet site(s) do you get your health and nutritional information from?

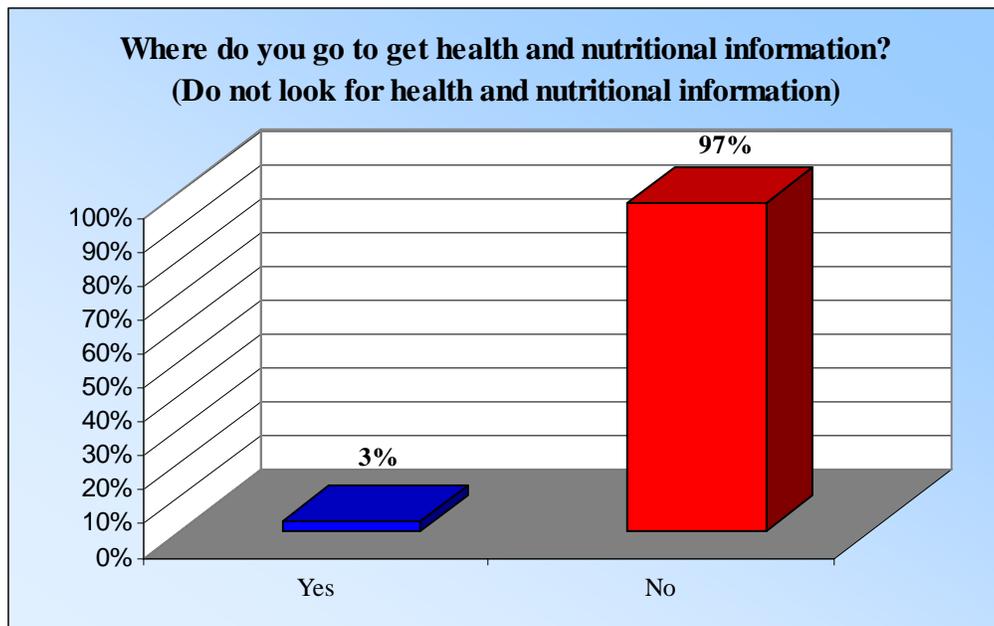
Yahoo	(1)
Total Responses ⁷	<hr/> 102

⁷ Some respondents gave more than one answer.

Question 21o: Where do you go to get health and nutritional information?
(Do not look for health and nutritional information)

Where do you go to get health and nutritional information?
(Do not look for health and nutritional information)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	12	3.1	3.1	3.1
	No	379	96.9	96.9	100.0
	Total	391	100.0	100.0	

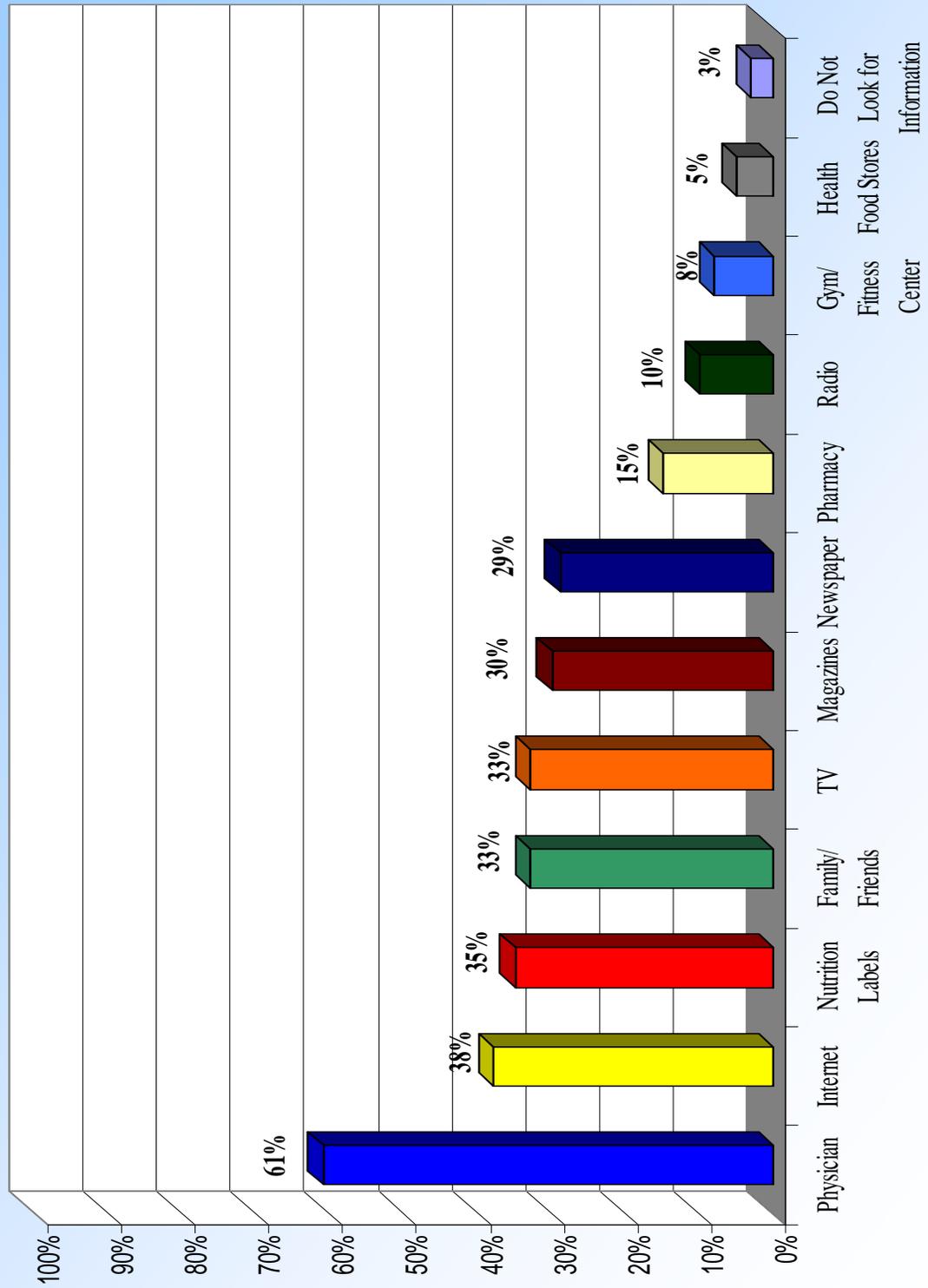


Three percent of respondents said that they do not look for health and nutritional information.

Question 21p: Where do you go to get health and nutritional information?
(Other)

<u>Response</u>	<u>Frequency</u>
Family Member	(18)
Books	(12)
Enrolled in a nutrition course	(2)
Documentaries	(1)
East Boston Health Clinic	(1)
Everywhere	(1)
Hospital	(1)
Life experience	(1)
Local co-op or grocery store	(1)
Mail	(1)
School	(1)
Senior Center	(1)
Through work	(1)
VA & insurance company	(1)
Weight Watchers	(1)
Total Responses	44

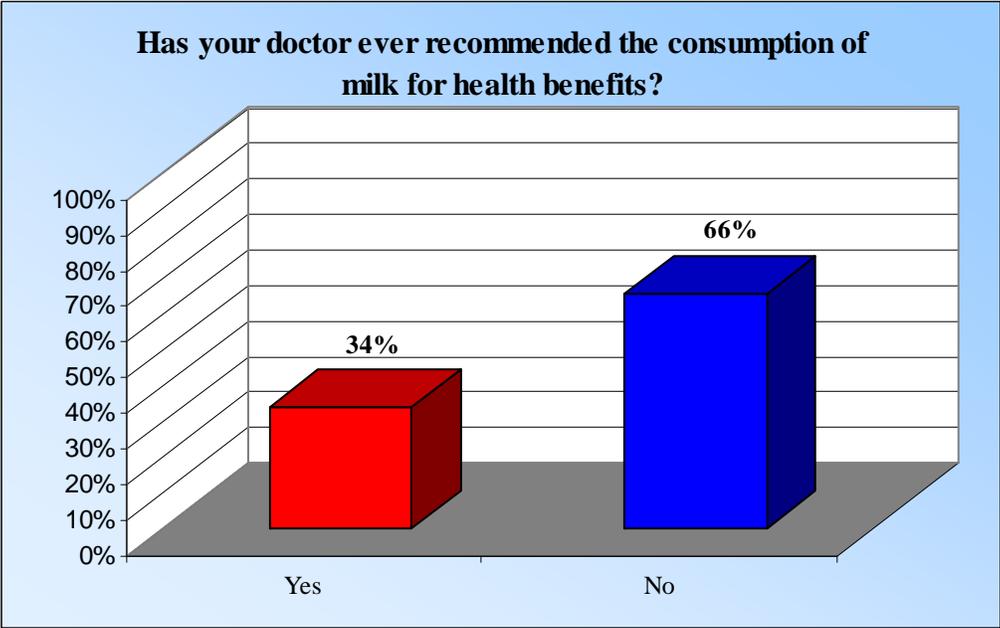
Where do you go to get health and nutritional information? (% Yes)



Question 22: Has your doctor ever recommended the consumption of milk for health benefits?

Has your doctor ever recommended the consumption of milk for health benefits?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	133	34.0	34.0	34.0
	No	258	66.0	66.0	100.0
	Total	391	100.0	100.0	

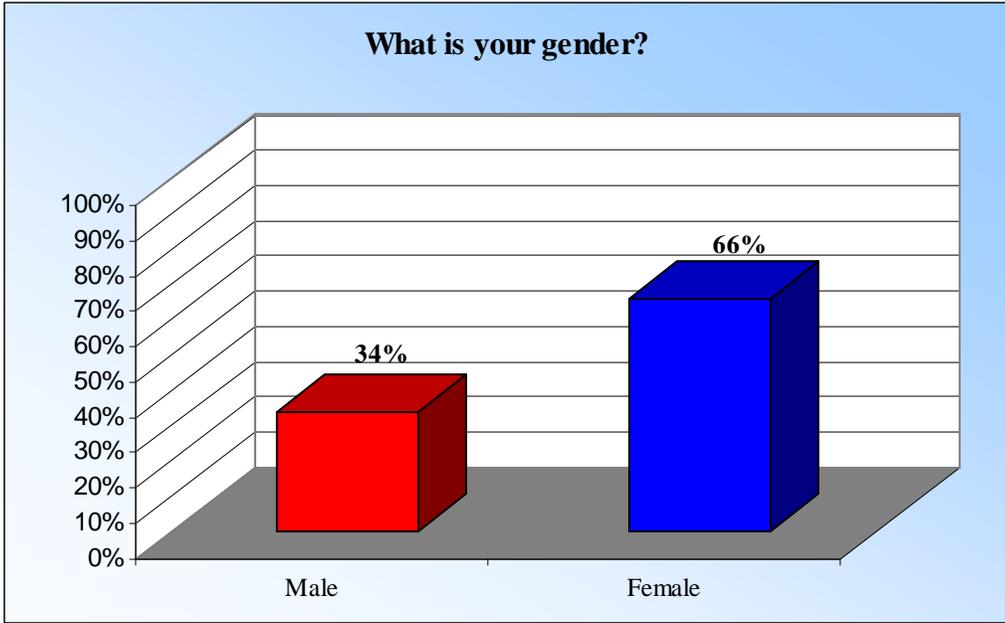


Thirty-four percent of respondents said that their doctor has recommended milk for health benefits.

Question 23: What is your gender?

What is your gender?

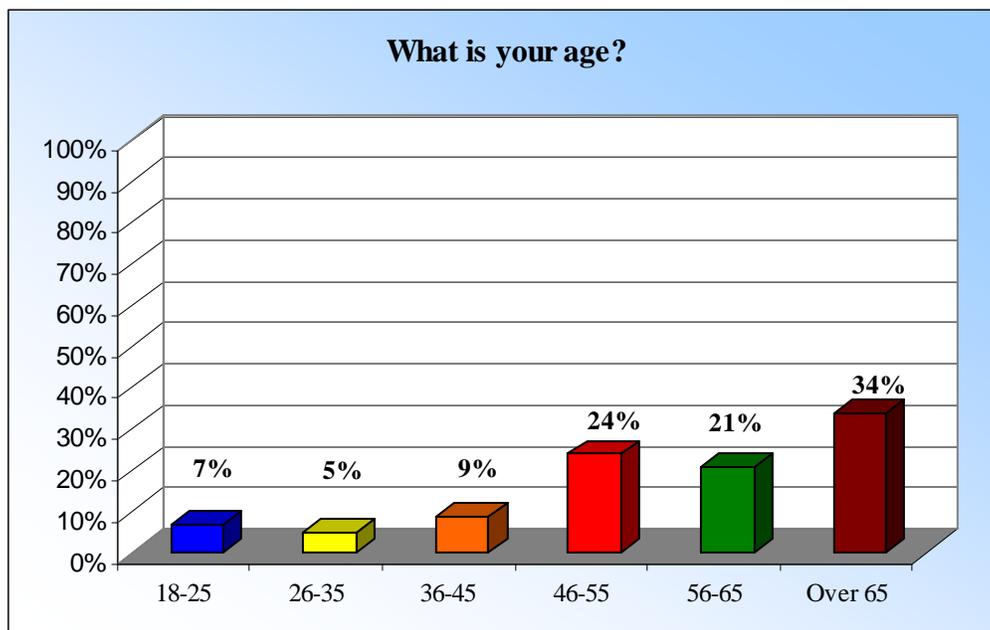
		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Male	133	34.0	34.0	34.0
	Female	257	65.7	65.7	99.7
	No Response	1	.3	.3	100.0
	Total	391	100.0	100.0	



Thirty-four percent of respondents are males and 66% are females.

Question 24: What is your age?

		What is your age?			
		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	18-25	26	6.6	6.6	6.6
	26-35	19	4.9	4.9	11.5
	36-45	34	8.7	8.7	20.2
	46-55	94	24.0	24.0	44.2
	56-65	83	21.2	21.2	65.5
	Over 65	134	34.3	34.3	99.7
	No Response	1	.3	.3	100.0
Total		391	100.0	100.0	

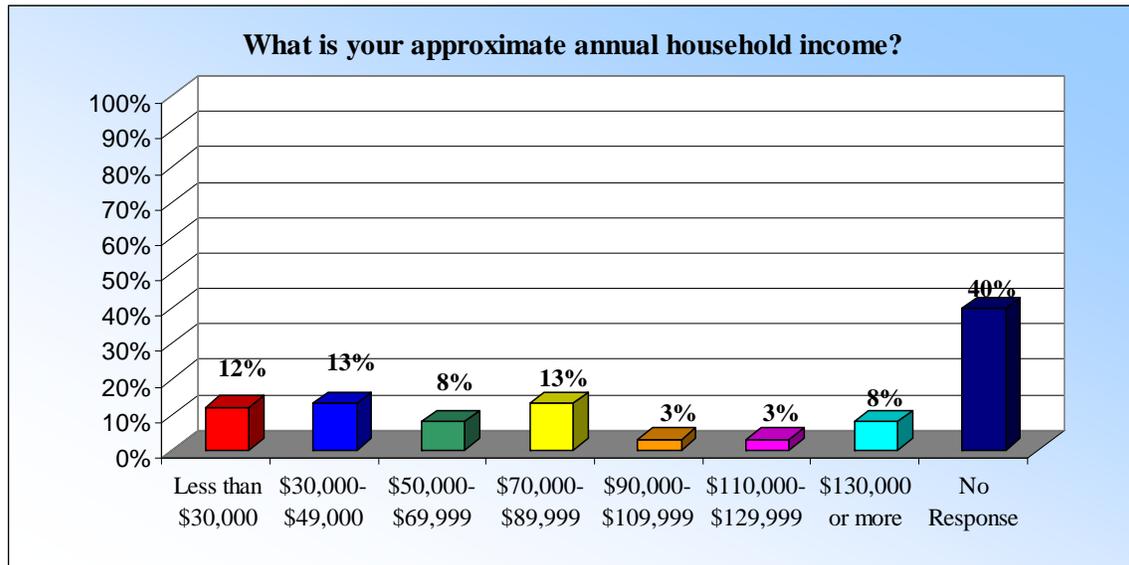


Seven percent of respondents are between the ages of 18-25, 5% are between the ages of 26-35, 9% of are between the ages of 36-45, 24% are between the ages of 46-55, 21% are between the ages of 56-65 and 34% are over the age of 65.

Question 25: What is your approximate annual household income?

What is your approximate annual household income?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Less than \$30,000	47	12.0	12.0	12.0
	\$30,000 - \$49,999	49	12.5	12.5	24.6
	\$50,000 - \$69,999	33	8.4	8.4	33.0
	\$70,000 - \$89,999	50	12.8	12.8	45.8
	\$90,000 - \$109,999	12	3.1	3.1	48.8
	\$110,000 - \$129,999	13	3.3	3.3	52.2
	\$130,000 or More	33	8.4	8.4	60.6
	No Response	154	39.4	39.4	100.0
	Total	391	100.0	100.0	

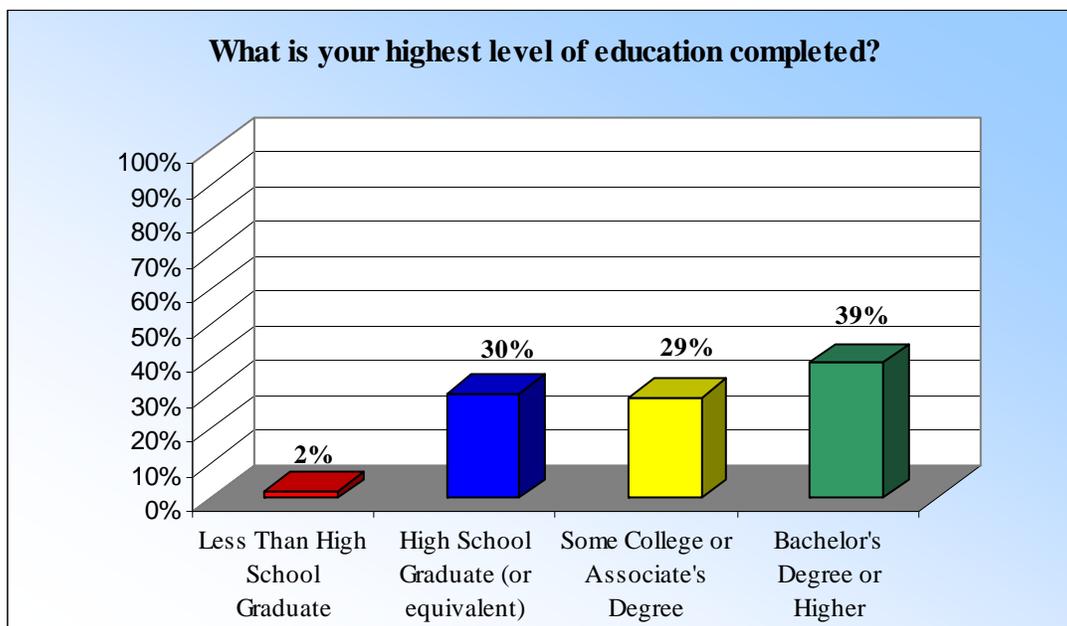


Twelve percent of respondents have an approximate household income of less than \$30,000, 13% earn \$30,000-\$49,000, 8% earn \$50,000-\$69,999, 13% earn \$70,000-\$89,999, 3% earn \$90,000-\$109,000, 3% earn \$110,000-\$129,999, 8% earn \$130,000 or more and 40% did not respond.

Question 26: What is your highest level of education completed?

What is your highest level of education completed?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Less Than High School Graduate	7	1.8	1.8	1.8
	High School Graduate (or Equivalent)	118	30.2	30.2	32.0
	Some College or Associate's Degree	114	29.2	29.2	61.1
	Bachelor's Degree or Higher	151	38.6	38.6	99.7
	No Response	1	.3	.3	100.0
	Total	391	100.0	100.0	



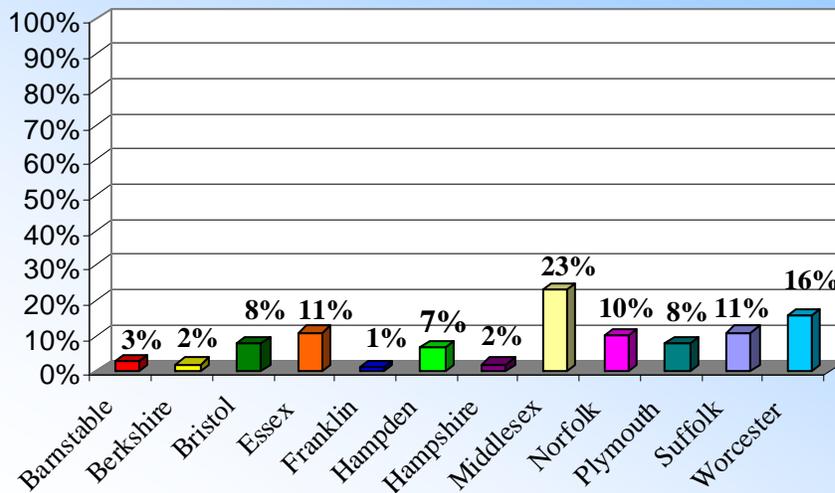
Two percent of respondents have less than a high school degree, 30% are a high school graduate or equivalent, 29% have some college or an Associate's Degree and 39% have a Bachelor's Degree or higher.

Question 27: County

What county are you from?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Barnstable	11	2.8	2.8	2.8
	Berkshire	8	2.0	2.0	4.9
	Bristol	31	7.9	7.9	12.8
	Essex	42	10.7	10.7	23.5
	Franklin	4	1.0	1.0	24.6
	Hampden	27	6.9	6.9	31.5
	Hampshire	8	2.0	2.0	33.5
	Middlesex	88	22.5	22.5	56.0
	Norfolk	38	9.7	9.7	65.7
	Plymouth	31	7.9	7.9	73.7
	Suffolk	42	10.7	10.7	84.4
	Worcester	61	15.6	15.6	100.0
	Total	391	100.0	100.0	

What county are you located in?



Two percent of respondents live in Barnstable county, 2% are from Berkshire, 8% are from Bristol, 11% are from Essex, 1% are from Franklin, 7% are from Hampden, 2% are from Hampshire, 23% are from Middlesex, 10% are from Norfolk, 8% are from Plymouth, 11% are from Suffolk and 16% are from Worcester county.

Additional Analysis
(Selected Cases)

This is a report of all cases in which people who were likely to purchase milk from a local dairy farmer. The question was: “How likely would you be to purchase milk assuming it was readily available from a local farmer?” SPSS then eliminated the respondents who were not likely to purchase milk, leaving only respondents who were likely.

How often do you buy the following dairy products? (Milk)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	On A Weekly Basis	209	87.8	87.8	87.8
	A Few Times A Month	24	10.1	10.1	97.9
	Only Occasionally	5	2.1	2.1	100.0
	Total	238	100.0	100.0	

How important are the following to you in choosing milk? (Cost)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Very Important	98	41.2	41.2	41.2
	Somewhat Important	79	33.2	33.2	74.4
	Somewhat Unimportant	29	12.2	12.2	86.6
	Very Unimportant	32	13.4	13.4	100.0
	Total	238	100.0	100.0	

How important are the following to you in choosing milk? (Massachusetts Produced)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Very Important	63	26.5	26.5	26.5
	Somewhat Important	75	31.5	31.5	58.0
	Somewhat Unimportant	50	21.0	21.0	79.0
	Very Unimportant	50	21.0	21.0	100.0
	Total	238	100.0	100.0	

Would you be willing to pay more for milk from a local farmer?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Definitely	77	32.4	32.4	32.4
	Probably	112	47.1	47.1	79.4
	Probably Not	37	15.5	15.5	95.0
	Definitely Not	12	5.0	5.0	100.0
	Total	238	100.0	100.0	

Findings for Milk Drinkers vs. Non Milk Drinkers

The majority of MA residents drink milk. Eighty-five percent of men say they drink milk and 80% of women. The differences between those that drink milk and those that do not, can't be found in their demographic profiles. The differences can be seen more clearly in their attitudes and behavior toward dairy products and their knowledge of them.

Milk drinkers are more likely to purchase milk for their families than those that describe themselves as not milk drinkers. When purchasing milk for themselves and their families, the milk drinkers prefer to buy 1%, 2% or whole milk by the gallon. They are likely to do that 1-2 times a week. They are also more likely to purchase butter, margarine and ice cream on a weekly basis than are the non-milk drinkers who are more likely to buy cheese every week along with skim or flavored milk. The non-milk drinkers are twice as likely to think organic milk is important (18% vs. 9%).

When asked what the most important thing they consider when buying milk, the milk drinkers pointed to taste (61%) and health benefits (60%). Non-milk drinkers think calories are the most important consideration in buying milk (43%). This distinction is reinforced when respondents were asked about their knowledge of some of the health benefits of milk. In every category studied (bone health, prostate, weight management, fractures, high blood pressure and colon cancer) milk drinkers were more likely to be aware of the benefit than their non-milk drinking counterpart.

When asked where they get health information, milk drinkers were more likely to cite physicians, pharmacists and television. Non-milk drinkers were more likely to get information from radio, newspapers, health food stores and the internet.

Both groups prefer incentives that involve sales and coupons or other price discounts.

Strategic Implications

Typically, marketing strategies involve two or three options:

1. Sell more product to current customers (focus on milk drinkers).
2. Find new markets for your products (focus on non milk drinkers).
3. Use initiatives that work for both groups if possible.

1. Sell more product to current customers

It is typically more efficient to increase consumption among current consumers than to try to create new buyers. In the case of dairy products, there is a large base of consumers enjoying milk and other dairy products. These people would welcome new dairy products. They believe that milk fits into their health conscious life style and demonstrate awareness of the health benefits of milk.

These consumers could be targeted with new dairy products as well as information that might help to increase current consumption. For those who already like the taste of milk and have no health issues prohibiting them from drinking it, are likely candidates to drink more flavored milk, more yogurt, more ice cream etc. Additional product forms could be marketed like ice cream bars, single serve flavored milks etc. using incentives that appeal to this group.

Since these consumers are focusing on health, information in doctor's offices, at pharmacies, online and even at point of purchase should detail milk's benefits. The milk drinkers are more likely to be TV watchers so this outlet could be utilized to demonstrate the many positive attributes of milk.

Milk drinkers are motivated by sales, coupons, or other price discounts. Making use of these could be helpful in encouraging increased consumption of milk and dairy products.

2. Find new markets for your products

The non-milk drinkers appear to be in the market for particular products. They purchase skim milk, lactose free milk, low fat flavored milk and cheese. They have more interest in organic milk and environmentally sound packaging.

They are very focused on the calories in milk and do not focus on the health benefits. In general, non-milk drinkers know less about the health benefits of milk. They are more likely to get their health information from newspapers, radio, product labels, or online.

Coupons and sales motivate this group to make purchases. Making use of these could encourage increased sales among the self-proclaimed non-milk drinkers.

3. Use initiatives that work for both groups.

There are similarities between the milk drinkers and non-milk drinkers. Both do cite doctor's offices, the internet, and family and friends as sources of health related information. Any campaign that made use of a viral internet campaign, a Facebook presence, or other networking outlet could be well received by both groups.

Both also noted coupons and sales as motivators. An extensive coupon campaign, sale or discount could increase sales of milk.

Recommendations & Conclusion

People consume dairy products on a regular basis. On a weekly basis, eighty-three percent purchase milk, 59% of respondents purchase cheese, 50% purchase yogurt, 39% purchase butter or margarine, 28% purchase cream, 26% purchase ice cream.

When asked about milk products suggestions included improved packaging and focusing on the reduction of additives and/or preservatives. Some consumers would like improved openings on the cardboard milk cartons, such as the plastic spouts commonly seen on orange juice containers. There were also suggestions for increasing the use of reusable glass bottles, suggesting that there is a growing interest in being environmentally friendly.

In addition, there were a number of suggestions that had to do with yogurt; from the variety of flavors in Go-Gurt to having no sugar added. Yogurt sales have been increasing and this is one area of dairy that would benefit from continued focus on innovation.

Of the consumers who took part in the study, a majority of them thought that there were between 60 and 100 dairy farms in Massachusetts, and many could not even guess a number. There needs to be more education on dairy farms, including providing exposure to local dairy farms. This may increase the number of consumers who purchase their milk locally from a dairy or farm.

Consumers who use the internet to find health and nutritional information, predominantly use WebMD or Google. It might be beneficial for the industry to advertise the value of dairy products on these sites.

The respondents in this study are aware that milk consumption is associated with calcium for bone health, that calcium helps prevent fractures in children, and that it helps with weight management. It is very important to communicate important health messages with the remaining benefits to consumers. Ninety-three percent of respondents are either very health conscious or somewhat health conscious, so they look for nutritional information and most likely health benefits. If benefits associated with milk consumption are readily available to consumers (perhaps on the packaging), awareness and sales may increase.

Coupons, sales, and discounts are the incentives of choice when asked what would motivate them to purchase local milk. Television and newspapers are the media outlets that motivate consumers the most, so reaching them with discounted prices through these channels will have the most impact.

The majority of respondents ranked taste as the most important factor when making a purchase. Cost, health benefits, calories, and purchasing local milk are also mentioned as considerations among consumers in this study. This information, along with the inclination to try free samples (which 43% of respondents prefer), would suggest that consumers be exposed to local milk and its benefits through promotions.

The consumers in the dairy market need to be exposed to the benefits of purchasing from a local farm and also to the benefits associated with dairy in general. By using free samples, coupons, regular discounts, and promotion through common online health resource websites, there is a considerable opportunity to reach consumers and spread the word about local dairy farms.