

1% Fat Milk Consumer Research Report

Prepared for:



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1. Management Summary

The Food Standards Agency (FSA) is a non-Ministerial Government Department set up by an Act of Parliament in 2000 to protect the public's health and consumer interests in relation to food. One of the Agency's key business targets is to enable consumers to choose a healthier diet to help reduce diet-related disease.

The Agency has set a strategic target to reduce the average saturated fat intake of those aged 5+ years to below 11% of food energy. Raising and maintaining consumer awareness and understanding about the need to reduce saturated fat, alongside driving and supporting behaviour change towards healthier eating habits, is a key part in working to meet this target.

In February 2009, the Food Standards Agency launched the first phase of its consumer awareness campaign on saturated fat. The campaign will be reprised in early 2010 with a particular focus on persuading people to switch to lower fat milk. If all consumers switched from semi-skimmed to 1% fat milk it would significantly reduce the saturated fat intake of the UK population, moving the Food Standards Agency closer to its overall target.

To support the next phase of its consumer awareness campaign on saturated fat, the Food Standards Agency commissioned this research to investigate consumer attitudes to, and the acceptability of, lower fat milk, specifically 1% fat milk, compared to the established best seller semi-skimmed milk (~1.7% fat).

The primary focus of this research was to obtain quantitative data on taste perceptions of semi-skimmed and 1% fat milk, and to explore barriers to switching from semi-skimmed to 1% fat milk in the future.

HPI conducted this research between October and November, 2009, using a multi-stage approach.

A profiling exercise was conducted to establish the milk consumption habits of the UK population. 2,078 telephone interviews were administered with a representative sample of UK adults (*16 years plus*). Respondents were asked to consider all the different ways that they use milk and then asked which types of milk they personally consumed on a regular basis.

The profiling exercise concluded that semi-skimmed milk is the most widely used milk in the UK, with 74% of all adults consuming semi-skimmed milk on a regular basis. Data from this stage was used to define the UK semi-skimmed milk user profile for the remaining stages of the research.

Blind sequential monadic taste tests were used to quantify the reaction of semi-skimmed milk users to semi-skimmed and 1% fat milk. In total, 614 tests were completed in town centre research facilities across six locations. At each location, people were randomly approached on the street and invited to attend a 15 minute test. Quotas (age, sex, social grade) were imposed to ensure that the respondent profile in each location matched the UK semi-skimmed milk user profile). During the test, respondents tasted and rated 1% fat milk and semi-skimmed in isolation, before completing a short questionnaire about their milk drinking habits and attitudes to health.

A series of mini focus groups were conducted at the taste test venues to add depth and colour to the survey data, and to help understand the taste and concept barriers to adopting 1% fat milk.

A total of 30 focus groups were conducted across the project, five per location. Each group consisted of 3-4 people and lasted 20-30 minutes. Group composition was structured by age, gender, life stage and milk consumed most often (full fat or semi-skimmed) to ensure that all key consumer types were represented.

The discussion guide covered current usage and attitudes towards milk, overall attitudes towards health and healthy eating, and awareness and expectations of 1% milk both pre and post taste test.

An in-home trial was included to evaluate consumer opinion of 1% fat milk in a real life environment, allowing consumers to reflect on the acceptability of 1% fat milk when used as they would usually use semi-skimmed milk at home.

After completing the blind taste test, all respondents (614) were asked to participate in the in home trial. 548 respondents agreed to take home a two pint bottle of 1% fat milk and use it as they would usually use semi-skimmed. Participants were called around 5 days later and asked

to complete a 10 minute telephone survey about how they used and what they thought of the 1% fat milk. A total of 292 respondents completed this aspect of the survey.

Summary of key findings:

- 74% of all adults consume semi-skimmed milk on a regular basis
- 52% of regular semi-skimmed milk users have never heard of 1% fat milk
- In blind taste tests 82% of participants were able to taste a difference between 1% fat milk and semi-skimmed milk
- In blind taste tests participants liked the taste of 1% fat milk as much as standard semi-skimmed milk
- When used at home, 85% reported that their children did not notice the switch from semi-skimmed to 1% fat milk
- Overall, 94% or more found that 1% fat milk was an acceptable alternative to semi-skimmed milk when used across all applications.

Overview

Semi-skimmed milk is the most widely used milk in the UK, with 74% of all adults consuming semi-skimmed on a regular basis. Skimmed milk was the next most widely used (26%), followed by full fat milk (20%), and 1% fat milk (13%). Semi-skimmed milk is popular for a broad number of reasons, including familiarity, a balanced taste profile, versatility, fat, calcium and protein content, and influence of others, including experts.

Awareness of and expectations for 1% fat milk are low. Fifty two percent (52%) of regular semi-skimmed milk users have never heard of 1% fat milk, and only one quarter (25%) have tried it.

On prompting, consumers' initial expectations for 1% fat milk are low. Consumers typically structure the market according to cap colour rather than by type or fat content, and overall awareness of exact fat levels in different types of milk is very low. Low exposure to 1% fat milk coupled with a limited understanding of the fat content in different types of milk leaves consumers confused about where 1% fat sits in the milk spectrum, drawing negative comparisons with skimmed milk and other low fat dairy products, limiting overall appeal.

In blind taste tests regular semi-skimmed milk users are able to tell the difference between 1% fat milk and semi-skimmed: 82% (or “*eight out of ten*”) regular semi-skimmed milk users were able to taste a difference between 1% fat milk and semi-skimmed milk. This result is consistent across different demographic groups. Several attributes drive this result: 1% fat milk was rated as less visually appealing than semi-skimmed milk, being more likely than semi-skimmed to be described as having an *unappealing appearance* and *looking too thin and watery*; 1% fat milk was also rated lower on taste, being more likely to be described as *not tasting rich enough*, *not tasting creamy enough* and *tasting too bland* than semi-skimmed.

However, in blind taste tests, regular semi-skimmed milk users liked the taste of 1% fat milk as much as standard semi-skimmed milk with 74% stating that they liked 1% fat milk and 77% stating that they liked semi-skimmed (statistically there is no significant difference between these scores).

This outcome is supported by a consistent result across user groups including sex, age and socio-economic group, and across other key measures, such as consideration, substitution, purchase intent and propensity to switch.

When used at home, regular semi-skimmed milk drinkers are less likely to perceive a difference between 1% fat and their usual semi-skimmed milk. During the blind taste test, 79% of the respondents that went on to complete the in home trial said that they could taste a difference between the 1% fat milk and the semi-skimmed milk. After trying it for a longer period of time at home, only 56% were able to detect a difference between the 1% fat milk and their usual semi-skimmed. Furthermore, during the in-home trial, sixty-seven participants gave the 1% fat milk to their children to try. The vast majority of those (85%) reported that their children did not notice the switch.

After extended use at home 1% fat milk exceeded expectations for the majority, with most being surprised by its overall taste, richness and creaminess. Overall it was seen as an acceptable alternative to semi-skimmed milk with 94% or more finding it an acceptable alternative across all applications, including in hot drinks, over cereal, as a drink on its own, in milk shakes and in cooking. Qualitative feedback from the focus groups support these results.

With an acceptable flavour and considerable health benefits 1% fat milk represents an attractive proposition to regular semi-skimmed milk users. After extended trial in home, overall opinion of 1% fat milk improved dramatically and all key measures significantly increased including consideration, acceptability as an alternative to semi-skimmed, purchase intent and willingness to switch.

This research identified three primary barriers to switching: *low awareness* (at 48%, awareness of 1% fat milk is relatively low for a staple product), *limited understanding of the milk market* (leaving consumers confused as to where 1% fat milk sits in the milk spectrum and it's potential benefits) and *low concept appeal* (a significant number continue to assume that it will lack flavour). *Price, availability and consumer inertia* were identified as secondary barriers.

This research identified three areas for consideration that may help to promote understanding and use by consumers of 1% fat milk: Agreement by industry on a *consistent cap colour scheme*, a *consistent naming strategy* that identifies the position of 1% fat milk within the milk spectrum (a possibility would be adopting a the US style of milk categorisation (by number) to help consumers to understand where 1% fat milk sits in relation to other milk types), a *strategy to promote the taste and health benefits of 1% fat milk*, considering the role of out of store advertising, shelf enhancers, in store tasting and discounts or celebrity endorsement.

2. Background and objectives

2.1 Background

The Food Standards Agency (FSA) is a non-Ministerial Government Department set up by an Act of Parliament in 2000 to protect the public's health and consumer interests in relation to food. One of the Agency's key business targets is to enable consumers to choose a healthier diet and help reduce diet-related disease. To help do this the Agency has a strategic target, based on public health recommendations and advice from independent government Scientific Advisory Committee on Nutrition to reduce the average saturated fat intake of those aged 5+ years to below 11% of food energy (the current population intake of 13.3% is around 20% higher than recommended).

Raising and maintaining consumer awareness and understanding about the need to reduce saturated fat, alongside driving and supporting behaviour change towards healthier eating habits, is a key part in working to meet this target. In February 2009, the Food Standards Agency launched the first phase of its consumer awareness campaign on saturated fat. The campaign included TV, print media advertising and a comprehensive website to engage consumers and raise awareness about the health implications of consuming too much saturated fat. It also provided simple tips on how to reduce intakes through easy substitutions when shopping, cooking or eating out. The intention is to reprise the campaign in early 2010 with a particular focus on persuading people to switch to lower fat milk.

Rationale for focus on 1% fat milk

Preliminary modelling work shows that if all consumers who currently use semi-skimmed milk switched to 1% fat milk it could significantly reduce the saturated fat intake of the UK population, moving the Food Standards Agency closer to its overall target of reducing saturated fat intake to no more than 11% of food energy.

To support the next phase of its consumer awareness campaign on saturated fat, the Food Standards Agency commissioned this research to investigate consumer attitudes to, and the acceptability of, lower fat milk, specifically 1% fat milk, compared to the established best seller semi-skimmed milk (~1.7% fat). The primary focus of this research was to obtain quantitative data on taste perceptions of semi-skimmed versus 1% fat milk.

This document summarises the key findings and recommendations to emerge from this research.

2.2 Research Objectives

The principal aims and objectives of this research were:

- To profile the UK milk drinking population, according to age, sex, socio-economic status, country and regional profile of regular semi-skimmed milk users;
- To quantify consumer taste perceptions of semi-skimmed and 1% fat milk, for example, to determine whether they can see or taste a difference;
- To explore barriers to trying new milk and/or switching to a different milk.

Additional objectives were to explore:

- the reasons behind consumer preferences for different types of milk;
- consumer attitudes towards and acceptability of lower fat milk, specifically 1% fat milk.

3. Methodology

A multi-stage approach was adopted in order to meet the full range of project objectives (see section 2.2).

3.1 Profiling

The first stage of this study involved profiling the milk drinking habits of the UK population.

2,078 computer aided telephone interviews were conducted with a representative sample of UK adults (*16 years plus*).

Respondents were asked:

Q.1 People consume Milk in a number of ways - on its own or in hot drinks, in cooking, poured over cereal and so on.

Which of the following types of milk do you personally consume on a regular basis?

- *Full fat milk*
- *Semi-skimmed milk*
- *Skimmed milk*
- *1% fat milk*
- *Any other kind of milk*
- *None of these/Don't use milk*

The exact questioning was agreed in conjunction with the COI and the FSA.

Quotas were used to ensure that the sample was representative in terms of gender, age, socio-economic grade and region, and the data was subsequently weighted to the exact UK adult population profile.

Data from this stage was used to identify the UK semi-skimmed milk user profile. This was subsequently used to devise the sample structure for the remaining stages of the research.

The fieldwork was conducted by ICM, between 2nd October and 8th October 2009.

3.2 Blind Taste Tests

“**Blind sequential monadic taste tests**” were used to quantify reaction of semi-skimmed milk users to semi-skimmed and 1% fat milk.

In a **blind** test the respondent is unaware of the type or brand of product that they are testing. In this instance the respondent was told:

“We are testing a range of different types of milk today. All the milk that we are testing is currently available to buy in your local shops and supermarkets. The milk that you are personally given to try may or may not be the milk that you usually drink”

In a **monadic** test the respondent evaluates each product in isolation, rather than being asked to compare it with a competing product. In this way, a monadic assessment simulates real life exposure to a product.

In a "sequential monadic" test such as this each respondent rates multiple products in isolation, rating the different products against the same variables (for example, overall opinion, likelihood to purchase etc) without ever comparing the products directly.

In this instance, each respondent was given a glass of milk (either 1% fat or semi-skimmed) and asked to rate it in isolation. They were then given a glass of the other milk and asked to repeat the process. Respondents were neither asked to state a preference nor to directly compare the milk that they had been given to try.

To avoid any possible bias occurring as a result of the order of presentation, the samples were rotated from person to person i.e. half of the respondents rated 1% milk first and the other half, semi-skimmed.

By using this design we can look at both ‘monadic results’ i.e. the ratings of those who tasted 1% or semi-skimmed first and also the combined results regardless of the order of tasting.

In total, **614** tests were completed in town centre research facilities across six locations. The first test took place in Islington, London on 13th October 2009. The remaining tests took place w/c 2nd November 2009 in Glasgow, Cardiff, Birmingham, Belfast and Leeds. A full sample breakdown is listed in the appendix.

At each location, people were randomly approached on the street and invited to attend a 15 minute test:

- Respondents were screened to ensure that they consumed semi-skimmed milk – it did not have to be their main or preferred milk type, as long as respondents regularly consumed semi-skimmed milk they were eligible to participate. The screening question mirrored the question used for the profiling exercise. The full recruitment questionnaire is included in the appendix (section 7.5).
- During the test, respondents tasted and rated each liquid in isolation (1% fat milk and semi-skimmed), before completing a short questionnaire about their milk drinking habits and attitudes to health.
- The taste test questionnaire was designed in conjunction with the COI and the FSA and is included in the appendix (section 7.10).
- A number of quality control measures were used to ensure an unbiased test. These included serving the milk samples at the same temperature in the same types of glasses and the rotation of the milk samples to avoid order effect, in other words half of respondents tasted 1% milk first and the other half semi-skimmed first (full details listed in the appendix).
- Respondents were paid a cash incentive (£5) in return for their co-operation.
- Quotas (age, sex, social grade) were imposed to ensure that the respondent profile in each location matched the UK semi-skimmed milk user profile. A full sample breakdown can be viewed in the appendix.

The final data was weighted in analysis to represent the UK semi-skimmed milk user population.

3.3 In-home trial

An in-home trial was included in the study to evaluate consumer opinion of 1% fat milk in a real life environment. This exercise allowed consumers to assess the acceptability of 1% fat milk when used in a more every day situation in-home over a longer period of time, for example in hot drinks, over cereal, in cooking etc.

After completing the blind taste test, all respondents (614) were asked to participate in a follow-up telephone interview. Overall, 548 respondents agreed to take home a two pint bottle of 1% fat milk and use it as they would usually use semi-skimmed. Of those a total **292** were interviewed around 5 days later about their experience with and opinion of 1% fat milk:

- Participants were advised about the fat content of different types of milk before being given two pints of 1% fat milk and asked to take it home and use it as they would normally use semi-skimmed milk.
- Participants were also given a set of printed instructions to remind them of what they were expected to do. The instructions included a reminder of the actual fat content of different types of milk.
- Participants were called around 5 days later and asked to complete a 10 minute telephone survey about how they used and what they thought of the milk (a full version of the questionnaire is included in the appendix).
- Participants were offered a cash incentive (£5) in return for their co-operation.

The final data was weighted in analysis to represent the UK semi-skimmed milk user population. (full details are published in the appendix, section 7.3 and 7.4).

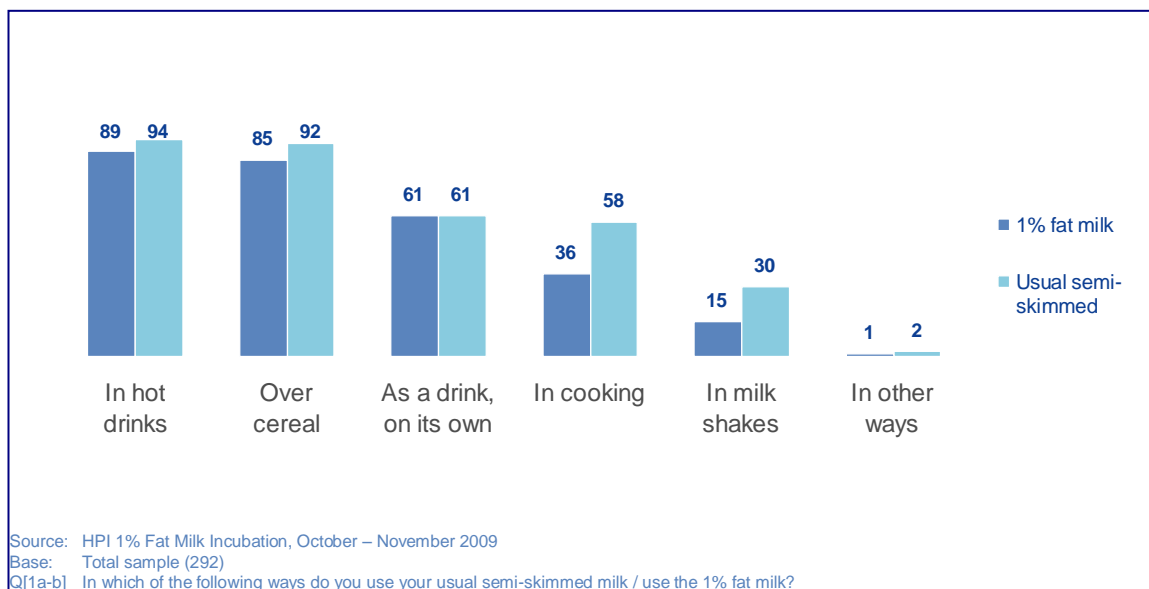
The telephone interviews were conducted by ICM, between 14th October and 13th November 2009.

To ensure the validity of this aspect of the study, before being given the 1% fat milk to try at home participants had to sign a form agreeing to use the 1% fat milk as they would usually use semi-skimmed.

The 1% fat milk was used in a range of ways during the trial, but overall its use broadly reflected typical respondent behaviour when using semi-skimmed. The small differences that do exist can be explained by volume (2 pints) and duration (around 5 days) limitations placed on the trial.

The 1% fat milk was mainly used in hot drinks (94%), over cereal (92%) and as a drink on its own (61%). Full results can be seen in **Figure 1**.

Figure 1 – In-home trial: how use of 1% fat milk compares with usual semi-skimmed



3.4 Focus groups

A series of mini focus groups were conducted at the blind taste test venues to add depth and colour to the survey data, and to help understand the taste and concept barriers to adopting 1% fat milk.

A total of **30 groups** were conducted across the project, five per sample point.

- Groups were conducted with respondents after they had completed the blind test.
- Each group consisted of 3-4 people and lasted 20-30 minutes.
- After the first test in Islington group composition was pre-recruited to ensure that all key consumer types were represented. Groups were structured by age, gender, life stage and milk consumed most often (full fat or semi-skimmed). A detailed breakdown of the sample is included in the appendix.
- Respondents were paid a cash incentive (£10) for their time

The discussion guide covered current usage and attitudes towards milk, overall attitudes towards health and healthy eating, and awareness and expectations of 1% milk both pre and post taste test. A copy of the discussion guide is included in the appendix (section 7.12).

3.5 Analysis

All differences referred to in the report as statistically significant are significant at a 95% confidence level (statistical significance=0.05). Due to the fact that a representative sample, rather than the entire population, was interviewed, the results are subject to sampling tolerances. Sample tolerances or 'confidence limits' vary by the percentage response and sample size, hence why the percentage difference required to produce a significant result will vary throughout this report.

Significant differences are indicated on the charts.

Percentages shown may not add to up to 100% for a variety of reasons – such as the exclusion of 'Don't Know' or 'Other' responses, multiple responses or rounding up of individual percentages. Where coded responses are combined, the figure may differ from the sum of all codes; this is due to rounding up.

4 Main findings

4.1 Milk consumer profile

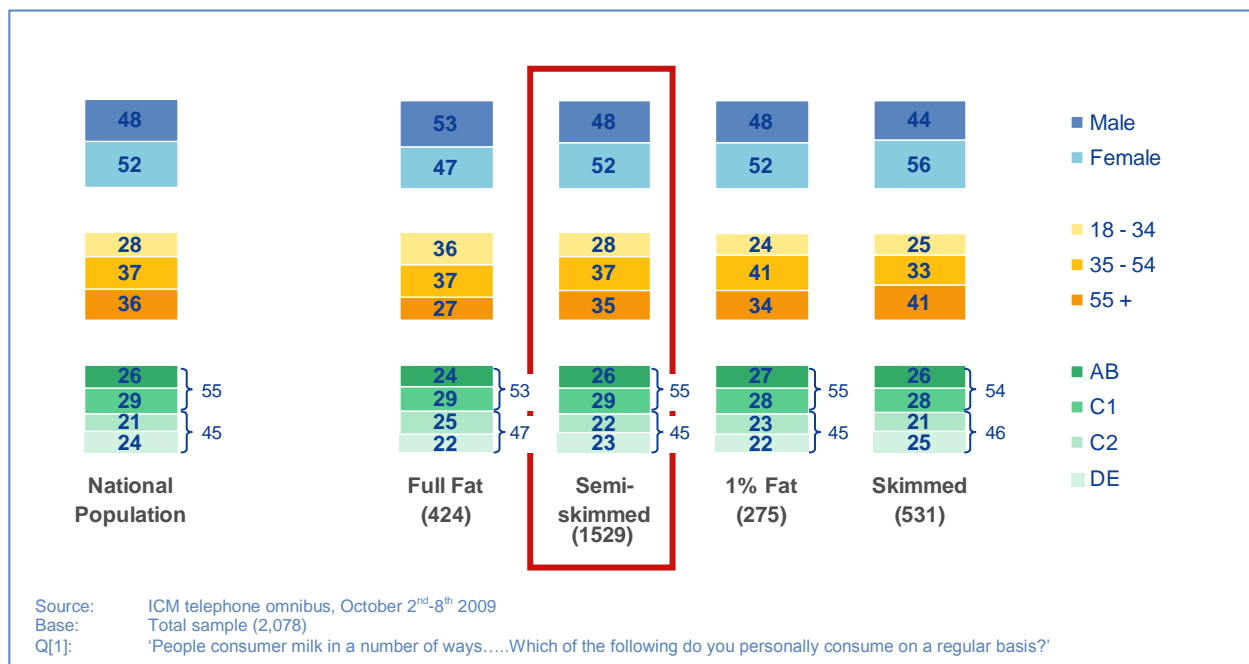
74% of all adults in the UK regularly consume semi-skimmed milk

The profiling exercise concluded that semi-skimmed milk is the most widely used milk in the UK, with 74% of all adults consuming semi-skimmed milk on a regular basis. Skimmed milk was the next most widely used (26%), followed by full fat milk (20%), and 1% fat milk (13%).

It also showed that semi-skimmed milk forms part of a repertoire of milk consumption for many regular semi-skimmed milk users. Just under one quarter (22%) also regularly consume skimmed milk, 13% also regularly consume 1% fat milk and 11% also regularly consume full fat milk.

The sex, age and SEG user profile of each major type of milk is shown in **Figure 2**. The semi-skimmed milk user profile (highlighted) is 48% male, 52% female; 28% 18-34, 37% 35-54, 35% 55+; 55% ABC1, 45% C2DE which is broadly in line with that of the national population.

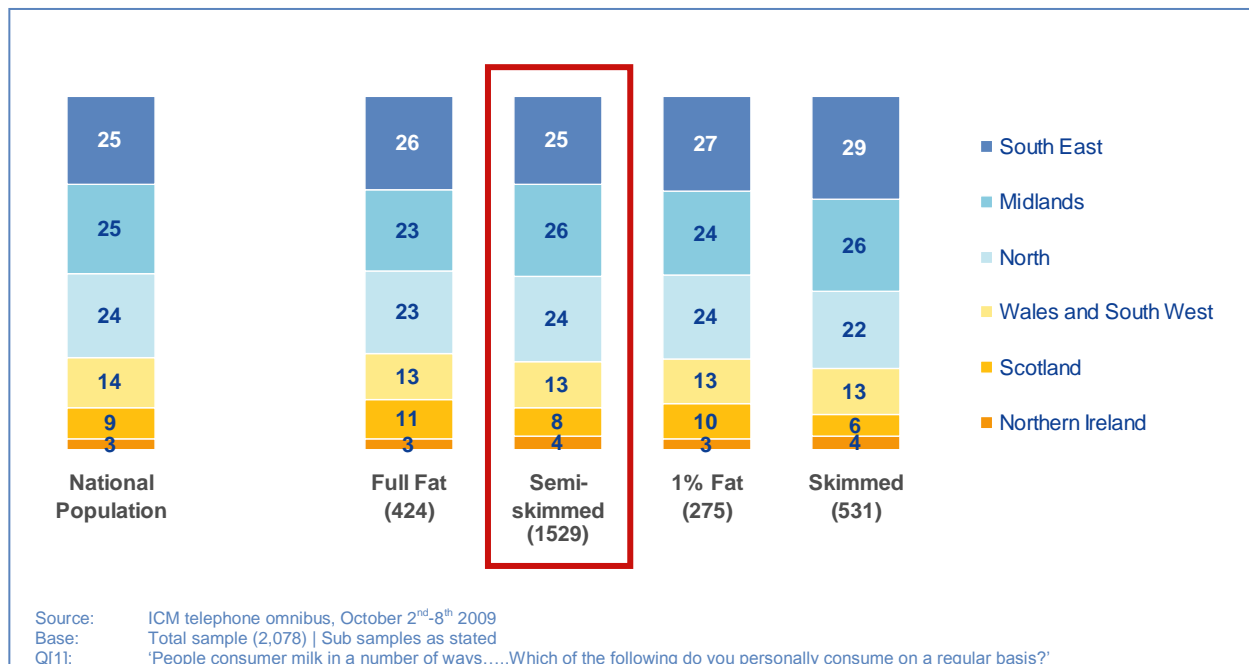
Figure 2 – Milk user profiles: by sex, age and SEG



The country and regional user profile of each major type of milk is shown in **Figure 3**. Because the use of semi-skimmed milk is so widespread, the country and regional profile of semi-skimmed milk drinkers (highlighted) broadly reflects the country and regional profile of the national UK population.

The first column in **Figure 3** shows the UK population broken down by country and region, for example, 25% of the UK population live in South East England. The following four columns show the UK full fat milk drinker population broken down by country and region, followed by the UK semi-skimmed, 1% fat and skimmed drinker population profile. For example, 26% of full fat milk drinkers live in the South East

Figure 3 – Milk user profiles: by country and region



4.2 The appeal of semi-skimmed milk

Semi-skimmed milk is popular for a broad number of reasons

The focus groups exposed a broad number of reasons for consumers preferring semi-skimmed milk above full fat or skimmed. These included:

- **Familiarity:** especially younger adults (18-34) who grew up with semi-skimmed at home.

- **A balanced taste profile:** some simply like the taste, being neither *too creamy* nor *too bland* and *watery* – ‘just right’ for them.
- **Versatility:** suitable for most of the uses of full fat milk.
- **Fat content:** providing an acceptable, lower fat alternative to full fat milk, especially appealing to older users and those that were more health conscious.
- **Calcium content:** providing an good source of calcium.
- **Protein content:** providing an good source of protein, ideal for making power shakes.
- **Influence of others:** typically where the user is not responsible for purchasing milk on a regular basis, either at home or at work.
- **Influence of experts:** dieticians or doctors making a recommendation on health grounds.

4.3 Awareness, taste test and expectations of 1% fat milk

Most regular semi-skimmed milk users have never heard of 1% fat milk, and only one quarter have tried it

Of the 612 regular semi-skimmed milk users that took part in the blind taste test, 52% had never heard of 1% fat milk and only 25% had ever tried it.

Awareness and usage levels were explored further in the focus groups:

- Supermarket shelves were revealed as the sole source of awareness of 1% milk
 - No mention of advertising or broader media.
 - No evidence of recommendation or word of mouth.
- Only a minority of regular semi-skimmed milk users participating in the groups had tried 1% fat milk, and those that had were usually prompted by in store factors rather than concept appeal or consumer intrigue

- **Pull:** price promotion (ASDA was mentioned by some) increasing standout and appeal to price sensitive consumers
- **Push:** regular milk unavailable

On prompting, consumers' initial expectations for 1% fat milk are low

Low trial and awareness of 1% fat milk coupled with a low awareness of the actual fat content of other types of milk i.e. skimmed, semi-skimmed and full fat leaves consumers confused as to where 1% fat sits in the milk spectrum, drawing comparisons with skimmed milk and other low fat dairy products and limiting overall appeal.

The focus groups revealed that most regular semi-skimmed milk consumers only have a basic understanding of the milk market and struggle to comprehend the positioning of 1% fat milk. Consumers typically structure the market according to cap colour rather than by type or fat content, and although most are aware that the 'blue top' contains the most fat and 'red top' contains the least, awareness of exact fat levels are very low with some suggesting that full fat milk contained anything up to 90% fat, and others happy to admit that they had no idea at all.

This fact is supported by the in-home trial data. When questioned at the end of the in-home trial, 80% of participants knew that 1% fat milk was healthier than semi-skimmed but the majority were still unable to accurately recall the fat content of different kinds of milk despite having been told this at the end of the hall interview and their in-home trial instructions containing a reminder of the fat content levels of the different types of milk.

Figure 4 – In-home trial result: Milk fat content estimates

Milk	Actual fat content	Average consumer estimate	(% don't know)
Full fat milk	c.3.6%	15.7%	(51%)
Semi-skimmed milk	c.1.7%	7.3%	(37%)
Skimmed milk	c.0.1%	2.8%	(42%)

Q5[a-c] Can you remember the fat content of [xx] milk?
 Source: HPI 1% fat milk in-home trial (base size 248)

On reflection, because the 1% fat milk proposition leads with fat content some consumers feel that it must be particularly healthy, aimed at people who are very careful about what they consume, either through choice or due to health problems. This leads to comparison with other

low fat dairy alternatives which are generally felt to lack flavour, providing health benefits that are rarely considered worth the taste compromise for people who don't fall into the aforementioned groups.

“I'd assume that 1% fat milk was really good for you, otherwise why would they shout about the fat content” (F, 55+, empty nester, Birmingham)

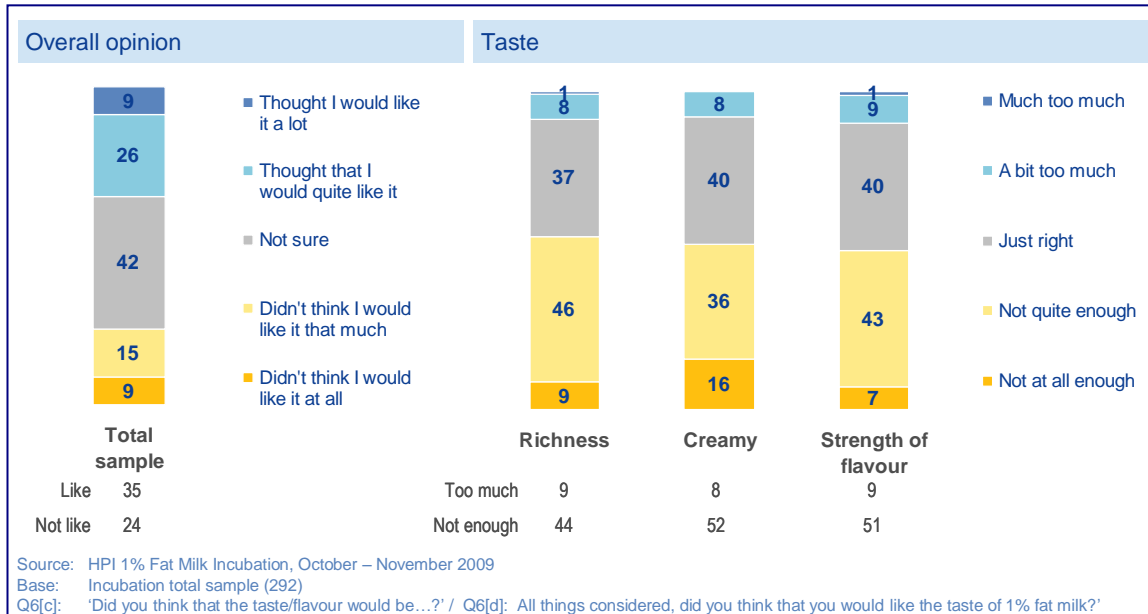
Some consumers conclude that 1% fat milk must have a lower fat content than skimmed milk, drawing negative associations with skimmed milk and leaving the impression that 1% fat milk was likely to be:

- thin and watery (appearance and consistency)
- lacking flavour (tasteless, bland, not rich or creamy)
- and not aimed at 'regular' people like me

“I reckon that it'll be really watery and tasteless, like skimmed milk” (M, 35-44, young family, Leeds)

These results are supported by the trial data. A considerable number of trial respondents initially thought that 1% fat milk would lack flavour, being too bland, not creamy enough and not rich enough.

Figure 5 – In-home trial result: Pre placement expectations



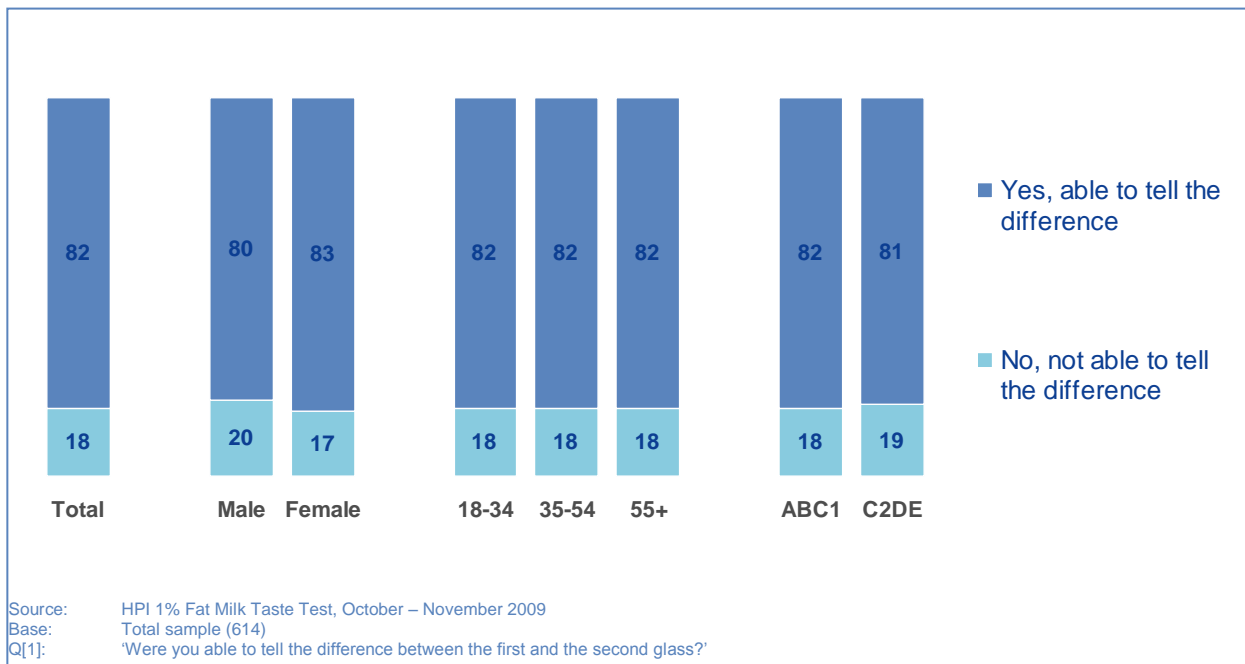
4.4 Consumer reaction to the taste and flavour of 1% fat milk

In blind taste tests regular semi-skimmed milk users are able to tell the difference between 1% fat milk and semi-skimmed

After having completed blind individual assessments of both 1% fat and semi-skimmed milk, respondents were asked whether they had been able to tell the difference between the two types of milk they had tasted.

Eighty two percent (or “*eight out of ten*”) of regular semi-skimmed milk users claimed to be able to taste a difference between 1% fat milk and semi-skimmed milk. This result is consistent across different demographic groups.

Figure 6 – Blind taste test results: ability to tell the difference between semi-skimmed milk and 1% fat milk in blind taste tests

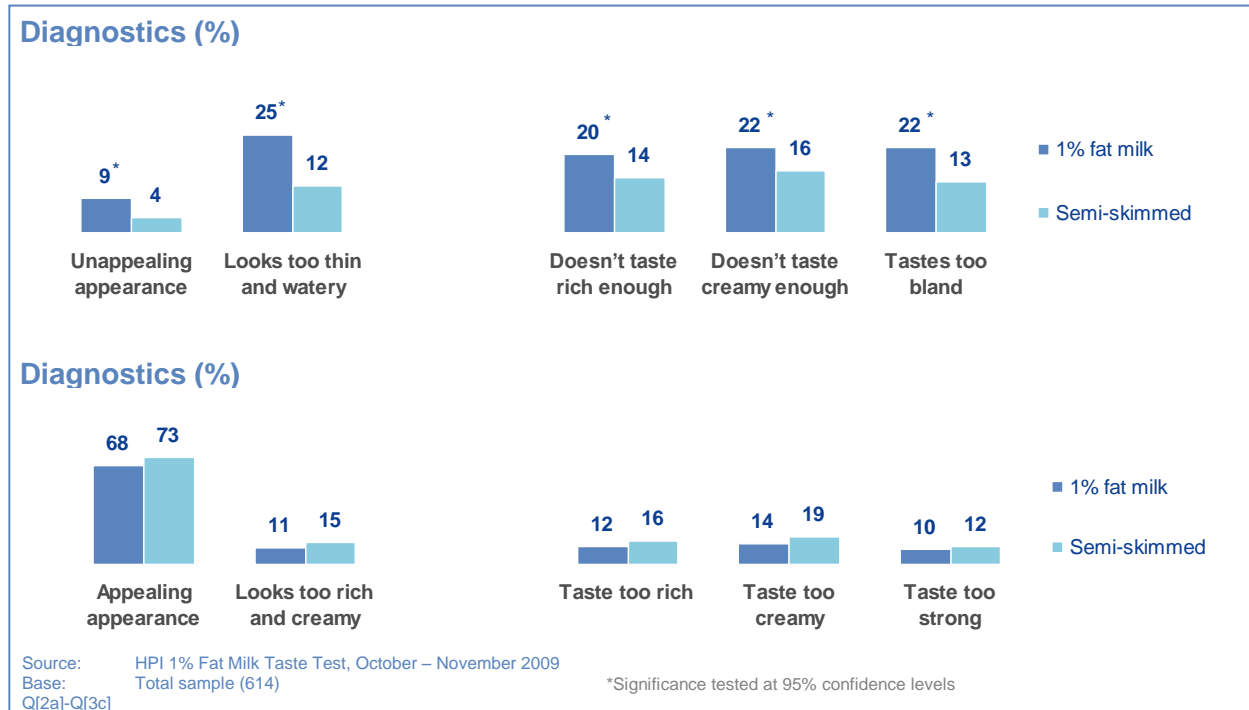


Overall, 29% claimed that 1% fat milk tasted very different to semi-skimmed milk, with the remaining 53% stating that the two milks were similar but that there was a difference.

Several attributes drive this result:

- In blind tests, 1% fat milk was rated as less visually appealing than semi-skimmed milk:** Respondents were asked two questions in relation to the appearance of the milk: Firstly how they would describe the colour of the milk on a 5-point scale from 'very appealing' to 'very unappealing', and secondly in terms of how creamy or watery the milk looked, again using a 5-point scale from 'much too rich and creamy' through to 'much too thin and watery'. These questions were asked about each milk in rotation (see description of sequential monadic testing, page 8). 1% fat milk was significantly more likely than semi-skimmed to be described as having an *unappealing appearance* and *looking too thin and watery*.
- In blind tests, 1% fat milk was rated lower on taste:** Respondents rated each milk on three taste measures (again, each on a 5 point scale): richness, creaminess and strength/blandness of flavour. 1% fat milk was significantly more likely than semi-skimmed milk to be described as *not tasting rich enough*, *not tasting creamy enough* and *tasting too bland*. These results are illustrated in **Figure 7**.

Figure 7 – Blind taste test results: Attributes driving consumer ability to discern a visual or taste difference between 1% fat milk and semi-skimmed milk



However, in blind taste tests, regular semi-skimmed milk users liked the taste of 1% fat milk as much as standard semi-skimmed milk

When asked ‘All things considered, how much do you like the taste of this milk?’

- 74% stated that they liked 1% fat milk, 77% stated that they liked semi-skimmed.
- 26% stated that they liked 1% fat milk a lot, 27% stated that they liked semi-skimmed a lot.

Statistically there is no significant difference between these scores.

This outcome is supported by:

- **A consistent result across user groups:** there is no difference between 1% fat milk and semi-skimmed milk scores on overall opinion of taste across subgroups including sex, age and SEG.

- **A consistent result across other measures:** there is no significant difference between scores given for 1% fat milk and semi-skimmed milk on *consideration*, *substitution*, *purchase intent* or *propensity to switch*.

These results are summarised in **Figure 8** below.

Figure 8 – Blind taste test results: Summary of key measures

Measure	Statement	1% fat milk	Semi-skimmed milk	Significant difference*
Overall opinion of the taste Q. All things considered, how much do you like the taste of this milk?	Like a lot	26%	27%	No
	Like a lot / quite like	74%	77%	No
Consideration Q. Would you consider this as an alternative to your usual semi-skimmed milk?	Yes, definitely consider	18%	19%	No
	Yes, definitely / probably consider	44%	47%	No
Substitution Q. If your usual milk were unavailable, would you be happy to use this milk instead?	Yes, very happy to use	27%	31%	No
	Yes, very / quite happy to use	71%	75%	No
Purchase intent Q. ...how likely would you be to buy this milk the next time that you went to your usual shop or supermarket?	Definitely buy	18%	19%	No
	Definitely / probably buy	44%	47%	No
Propensity to switch Q. ...do you think that you would switch to this from your usual semi-skimmed milk?	Definitely switch	13%	15%	No
	Definitely / probably switch	41%	41%	No

*95% confidence levels

Introducing a ‘lower fat’ concept significantly improves willingness to switch for both liquids

At the end of each of the blind taste tests, respondents were asked if they would be willing to switch to the milk that they had just tasted if it was *lower in fat* than their usual semi-skimmed milk. Reminder: at no point during the test were respondents told what they were actually drinking.

The results identify the following:

- In blind taste tests, respondents’ overall willingness to switch significantly increases when told that the milk they are drinking is *lower in fat* than their regular semi-skimmed.

Willingness to switch significantly increases regardless of which milk the respondent is evaluating - 1% fat milk or semi-skimmed. There is no significant difference between 1% fat and semi-skimmed milk switching scores, either in terms of actual willingness to switch, or in terms of the increase in willingness to switch generated by the *lower in fat* concept – both types of milk benefit equally the concept of being *lower in fat*. **Figure 9** shows responses given at this question.

Figure 9 – Blind taste test results: switching score summary

Measure	Statement	1% fat Milk (Blind)	1% fat Milk (lower in fat)	Significant difference*
Propensity to switch <i>Q. ...do you think that you would switch to this from your usual semi-skimmed milk?</i>	Definitely switch	13%	24%	Yes
	Definitely / probably switch	41%	53%	Yes

Measure	Statement	Semi-skimmed Milk (Blind)	Semi-skimmed Milk (lower in fat)	Significant difference*
Propensity to switch <i>Q. ...do you think that you would switch to this from your usual semi-skimmed milk?</i>	Definitely switch	15%	28%	Yes
	Definitely / probably switch	41%	56%	Yes

Measure	Statement	1% fat Milk (lower in fat)	Semi-skimmed Milk (lower in fat)	Significant difference*
Propensity to switch <i>Q. ...do you think that you would switch to this from your usual semi-skimmed milk?</i>	Definitely switch	24%	28%	No
	Definitely / probably switch	53%	56%	No

*95% confidence levels

When used more conventionally at home, regular semi-skimmed milk drinkers are less likely to perceive a difference between 1% fat and their usual semi-skimmed milk

During the blind taste test, 79% of the respondents that went on to complete the in-home trial stage said that they could taste a difference between the 1% fat milk and the semi-skimmed milk. After trying it for a longer period of time at home, only 56% were able to detect a difference between the 1% fat milk and their usual semi-skimmed.

Furthermore, during the in-home trial, sixty-seven (23%) participants gave the 1% fat milk to their children to try. The vast majority (85%) reported that their children did not notice the switch.

After extended use at home, almost all regular semi-skimmed milk users found the 1% fat milk to be an acceptable alternative to their usual semi-skimmed.

During the in-home trial participants consumed the 1% fat milk in a number of ways. In the interview that followed they were asked to rate the acceptability of 1% fat milk for each of the ways in which they had used it.

The vast majority of semi-skimmed milk users found 1% fat milk to be an acceptable alternative to semi-skimmed milk for all applications.

- 95% rated 1% fat milk as an acceptable alternative to semi-skimmed milk in hot drinks,
- 95% over cereal,
- 94% as a drink on its own,
- 98% in milk shakes, and
- 98% in cooking.

Verbatim comments from the in-home trial support these points, **Figure 10**.

Figure 10 – In-home trial results: What regular semi-skimmed milk users particularly liked about 1% fat milk

<p><i>It was indistinguishable to the milk I usually have. It tasted absolutely fine with no difference at all</i> Male, 45 – 54, AB, London, Family</p>	<p><i>There was very little difference in taste and it had less fat</i> Male, 35 – 44, C1, Cardiff, young family</p>	<p><i>It has the same taste as semi-skimmed milk. I quite like it. It was just like using normal semi-skimmed</i> Female, 31 – 34, Leeds, Young Family</p>
<p><i>I really liked it over my cereal. It was really cream, looked nice and has less fat!</i> Female, 35 – 44, C2, Birmingham, Family</p>	<p><i>It's good for hot drinks and cereal and I would recommend it to other people</i> Male, 25 – 30, Cardiff, Young pre-family</p>	<p><i>The taste was good. It's much milkier and creamier than I expected. I'm now buying it instead of semi-skimmed</i> Male, 55 – 64, C2, Birmingham, Family</p>
<p><i>It's only 1% fat yet the taste was great. It looked fine too, it didn't look watery at all</i> Female, 25 – 30, AB, Glasgow, Young pre-family</p>	<p><i>It was quite acceptable. I thought it was very similar to the semi-skimmed that we already use. I was quite happy with it</i> Male, 65+, C1, London, Empty nester</p>	<p><i>We'd buy that over semi-skimmed. It's very nice</i> Female, 35 – 44, E, Belfast, Middle aged no family</p>
<p><i>After I'd tried it a few times it didn't taste any different from semi-skimmed milk, but it's got less fat in and is healthier for you</i> Male, 45 – 54, D, Belfast, Middle aged no family</p>	<p><i>I like the flavour. It's like drinking wine – I know I like it but I don't understand why. We are actually buying it for the house now.</i> Female, 55 – 64, AB, Cardiff, Older Family</p>	<p><i>I like that fact that it's very low in fat. I'm not losing any nutritional value and the flavour is the same as semi-skimmed</i> Female, 35 – 44, C1, Glasgow, Young Family</p>

On reflection, regular semi-skimmed milk users found 1% fat milk to be richer, creamier and less bland than expected.

As previously mentioned, consumer expectations for 1% fat milk are initially low. Having tried 1% fat milk conventionally at home most participants were surprised by its overall taste, richness and creaminess.

The taste and flavour of 1% fat milk was rated as 'just right' for the majority:

- 84% rated 1% fat milk as just right in terms of richness
- 79% rated 1% fat milk as just right in terms of creaminess
- 83% rated 1% fat milk as just right in terms of strength of flavour

These results represent a significant improvement on initial perceptions (**Figure 11**), and 68% of trial participants subsequently admitted that their overall opinion of 1% fat milk had improved as a direct result of the trial (**Figure 12**).

Figure 11 – In-home trial results: Opinion of 1% fat milk taste profile vs. original perceptions

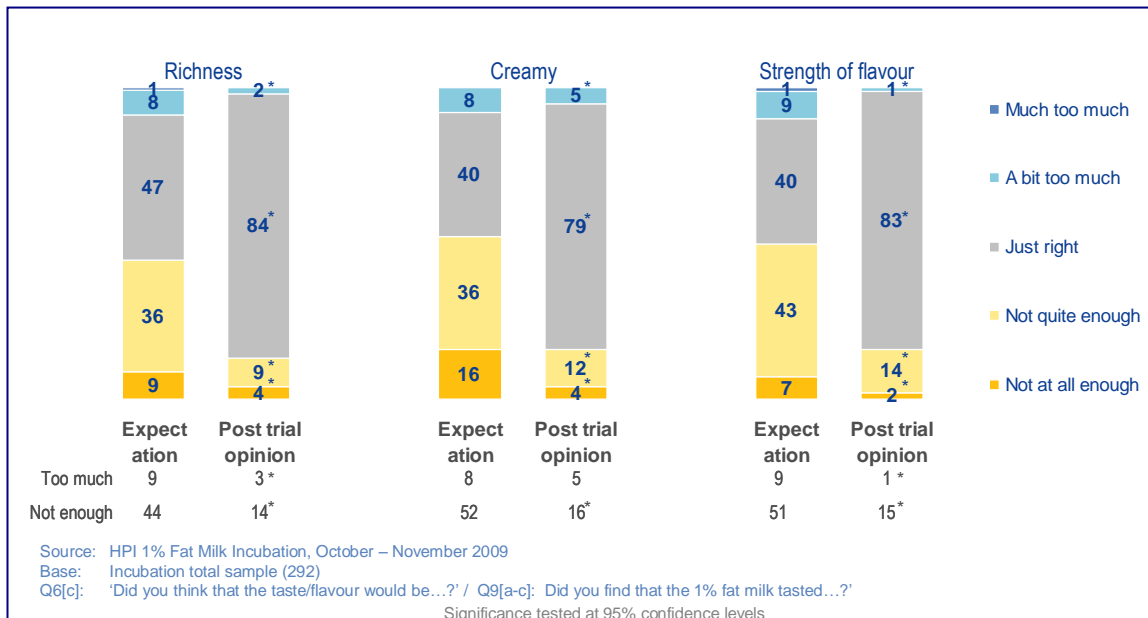


Figure 12 – In-home trial results: Why has your opinion of 1% fat milk improved

<p><i>I thought it would be a bit bland but it tasted nice with cereal, tea and coffee</i> Male, 45 – 54, D, London, Middle aged no family</p>	<p><i>As far as my children go, I would give it to them and they wouldn't taste any difference. It's more healthier also.</i> Female, 35 – 44, D, Glasgow, Young Family</p>	<p><i>It's got less calories. I thought semi-skimmed was good enough but this is even better.</i> Female, 35 – 44, C1, Birmingham, Middle aged no family</p>
<p><i>It was nice with the porridge!</i> Male, 55 – 64, C1, Glasgow, Empty Nester</p>	<p><i>I didn't think it'd taste as nice as it did. It didn't really taste that different</i> Female, 31 – 34, E, Leeds, Young Family</p>	<p><i>It tasted much better than I thought it would. I thought it'd be thin and tasteless</i> Male, 65+, C1, London, Empty nester</p>
<p><i>I was surprised! It was quite creamy, like normal (semi-skimmed) milk and I like that fact that its fat content is lower</i> Female, 18 – 24, AB, Belfast, Young pre-family</p>	<p><i>Now that I've tried it, it's not that different to semi-skimmed milk</i> Female, 18 – 24, C2, Birmingham, Young pre-family</p>	<p><i>It just tasted a lot better (than I thought) and I need to go for the healthier option so it was just right, perfect for me</i> Male, 35 – 44, E, Leeds, Middle aged no family</p>
<p><i>Because it's a low fat, healthy option and I'm trying to watch my cholesterol. It's a healthy alternative!</i> Male, 35 – 44, D, Leeds, Young Family</p>	<p><i>After trying the milk I thought it was really good. I thought it wouldn't be creamy enough and a bit watery, but it's fine</i> Female, 35 – 44, C1, London, Young Family</p>	<p><i>I was totally surprised at how easy it was to get used to it. It's very pleasant</i> Male, 45 – 54, C2, Belfast, Older Family</p>

Qualitative feedback from the focus groups support these results

On reflection, most regular semi-skimmed milk users were comfortable with the appearance and taste of 1% fat milk, feeling that it looked closer to semi-skimmed than skimmed – appearing creamier and less watery than expected, sticking to / lacing down the edge of the glass – and that it had a stronger flavour and creamier taste than initially expected.

During the groups a minority preferred the 1% fat to semi-skimmed. These people described 1% fat milk as having a lighter taste, aftertaste and mouth-feel than semi-skimmed, without being thin and bland like skimmed.

With an acceptable flavour and considerable health benefits 1% fat milk represents an attractive proposition to regular semi-skimmed milk users

The 292 in-home trial participants were asked a range of hedonic questions relating to their overall opinion of 1% fat milk during the blind taste test. These questions were repeated during the interview that took place at the end of the trial.

After extended trial in-home, overall opinion of 1% fat milk improved dramatically and all hedonic measures significantly increased.

- 85% said that they would consider 1% fat milk as an alternative to their usual semi-skimmed
- 95% would be happy to use 1% fat milk if their regular semi-skimmed milk was unavailable
- 83% would be likely to buy 1% fat milk the next time that they went to their usual shop or supermarket if it was available
- 72% would be willing to switch to 1% fat milk from their usual semi-skimmed if it was available where they shop

Figure 13 – In-home trial results: summary of key measure scores for 1% fat milk

Measure	Statement	Blind taste test	After in-home trial	Significant difference*
Consideration Q. <i>Would you consider this as an alternative to your usual semi-skimmed milk?</i>	Yes, definitely consider	19%	53%	Yes
	Yes, definitely / probably consider	48%	85%	Yes
Substitution Q. <i>If your usual milk were unavailable, would you be happy to use this milk instead?</i>	Yes, very happy to use	31%	62%	Yes
	Yes, very / quite happy to use	69%	85%	Yes
Purchase intent Q. <i>...how likely would you be to buy this milk the next time that you went to your usual shop or supermarket?</i>	Definitely buy	23%	57%	Yes
	Definitely / probably buy	55%	83%	Yes
Propensity to switch Q. <i>...do you think that you would switch to this from your usual semi-skimmed milk?</i>	Definitely switch	15%	46%	Yes
	Definitely / probably switch	47%	72%	Yes

Source: HPI 1% fat milk In-home trial (base size 292)

*95% confidence levels

Willingness to switch was higher among C2DE users and those over the age of 35.

Qualitative feedback from the focus groups support these results, with older users tending to be more enthusiastic about switching to 1% fat milk from semi-skimmed. This was generally because they were more likely to be health conscious than younger users (affected by conditions such as obesity, heart disease and diabetes). For older users, 1% fat milk offered health benefits with low compromise (if any) in terms of quality or taste.

Figure 14 – In-home trial results: motivations for switching to 1% fat milk

<i>“Because there’s no difference in the taste to semi-skimmed</i> Female, 18 – 24, C2, Birmingham, Young pre-family	<i>The taste of how nice it was shocked me. I’ll definitely buy it</i> Female, 55 – 84, C2, Birmingham, Empty Nester	<i>I purchased a bottle a bottle of 1% fat milk total. I just really enjoyed the taste</i> Male, 18 – 24, C1, England, London, Young pre-family
<i>Well I may as well it’s the same price, tastes the same and has less fat!</i> Female, 18 – 24, AB, Belfast, Young Family	<i>Basically because of the calories and the fat content</i> Male, 35 – 44, C1, Cardiff, Young Family	<i>The 1% fat milk tasted better than the normal milk we have and on top of that it’s 1% fat</i> Male, 35 – 44, D, Leeds, Young Family
<i>I was very happy with it. The taste was good. It went with everything I tried it with</i> Male, 18 – 24, C1, Cardiff, Young Family	<i>I really like the flavour and it has less fat</i> Female, 25 – 30, AB, Glasgow, Young Pre-family	<i>Because it tastes good and it’s healthy – it’s all around better</i> Female, 35 – 44, E, Glasgow, Young Family
<i>I’ve tried it and I liked it. The taste was very nice and it’s the healthy option so it’s more appealing</i> Female, 35 – 44, C1, London, Young Family	<i>I like anything that is low fat ...I will certainly buy it if it’s the same price as the one I use every day</i> Female, 65+, AB, Belfast, Empty Nester	<i>Because it’s similar to my normal milk and it has health benefits</i> Male, 25 – 30, C1, Birmingham, Young pre-family

5 Barriers to switching to 1% fat milk

With an acceptable flavour profile and considerable health benefits 1% fat milk represents an attractive proposition to regular semi-skimmed milk users.

This research identified three primary barriers to switching:

1. **Low awareness:** awareness of 1% fat milk is relatively low for a staple product (48%). Supermarket shelves provide the sole source of awareness and there was no mention of advertising, broader media or word of mouth from any participants. Consequently, levels of trial are also low (25%), with purchase more likely to be driven by in-store factors than by concept appeal or consumer intrigue (e.g. pull of a promotion for price-sensitive consumers, or push from regular semi-skimmed milk being unavailable).
2. **Low understanding of products:** regular semi-skimmed milk users only have a basic understanding of the milk market, more commonly referring to milk by the cap colour than by type or fat content.

Awareness of fat levels is very low. Even after having been made aware of respective fat levels, the regular semi-skimmed milk users are typically unable to accurately recall the fat content of different types of milk.

Limited exposure to 1% fat milk coupled with a limited understanding of the milk market leaves consumers confused as to where 1% fat milk sits in the milk spectrum. They conclude that 1% fat milk, promoted on the strength of its fat content, must be a niche product, lower in fat than skimmed, lacking in flavour and aimed at a minority who take their health very seriously i.e. “not for people like me”.

3. **Low concept appeal:** once consumers understand the positioning of 1% fat milk in relation to other milk varieties, a significant number continue to assume that it will lack flavour.

There are two reasons for this. Firstly, consumers place 1% fat milk closer to skimmed milk than semi-skimmed and therefore most assume that it will be thin and watery, bland and tasteless, lacking the (relatively) rich and creamy flavour of semi-skimmed.

Secondly, it is a commonly held belief that low fat dairy products denote a compromise when it comes to quality and flavour.

Associations with skimmed milk therefore limit the appeal of 1% fat milk as a concept.

Three secondary barriers were identified:

4. **Price:** some consumers assume that '1% fat milk' is a branded product and therefore likely to be more expensive than own brand varieties. Concern naturally increases for low income groups and those who consume milk in high volumes.
5. **Perceived availability:** limited distribution, restricted shelf space and low standout can lead to the perception that 1% fat milk is not available 'where I shop' and in fact at the time of research this was a genuine issue with stocks of 1% fat milk in many supermarkets visited running out. Despite the health benefits, consumers are unwilling to change their shopping behaviour for the sake of 1% fat milk.
6. **Inertia:** a minority of consumers are entrenched in current behaviour and simply do not perceive a 0.7% fat reduction as reason to swap to 1% fat milk

6 Considerations for the sector

This research identified three areas for consideration

1. **Work with the industry to agree a consistent cap colour:** this is especially important in a sector structured by cap colour and which forms as key factor by which consumers make their choice. Some retailers and manufacturers currently lead with purple, while others lead with orange.
2. **Develop a consistent naming strategy that identifies the position of 1% fat milk within the milk spectrum:** adopting a the US style of milk categorisation (by number) may help consumers to understand where 1% fat milk sits in relation to other milk types. Currently in most retailers, 1% fat milk stands alone its attempt to label by fat content. This is essential for consumers that are limited to a basic understanding of a complex and crowded market.
3. **Promote the taste and health benefits of 1% fat milk:** shoppers tend not to 'browse' the milk section, so adoption will be much slower without additional stimulus. Options include:
 - *Out of store advertising* to drive awareness and increase interest.
 - *Shelf enhancers* to educate shoppers about fat levels, clearly positioning 1% fat milk between semi-skimmed and skimmed.
 - *In-store discounts to encourage trial, these are particularly important to price sensitive shoppers.*
 - *In-store tasting* to raise awareness and reassure those jumping to unfounded assumptions.
 - *Celebrity endorsement* also had some merit.

7 Appendix

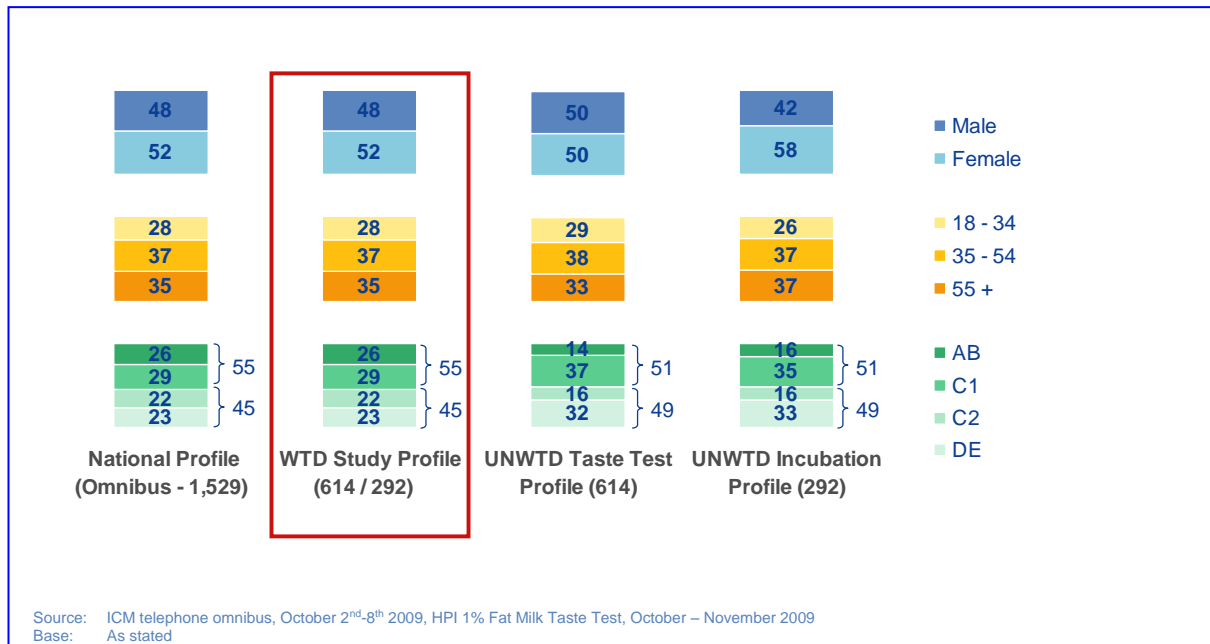
7.1 Study sample: Total sample sizes

	Total	South East (Islington)	Midlands (Birgham)	North (Leeds)	South West / Wales (Cardiff)	Scotland (Glasgow)	Northern Ireland (Belfast)
Profile	2078	484	527	511	302	194	60
Taste Test	614	100	103	103	101	104	103
Mini focus groups	30	5	5	5	5	5	5
In-home trial	292	44	51	52	51	43	51

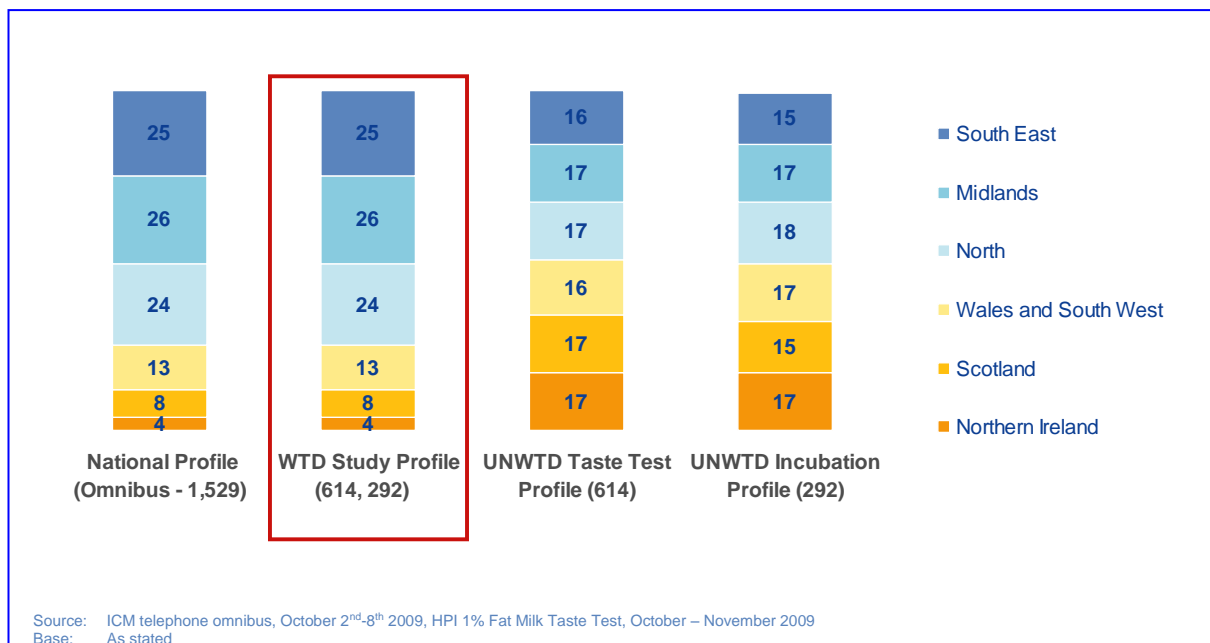
7.2 Study sample: Mini focus group structure (sex, age, life stage, most often)

Group	One	Two	Three	Four	Five
Glasgow	Male, 18-34, pre family, Semi skimmed	Female, 35-44, young family, Full fat	Female, 35-44, young family, Semi skimmed	Female, 45-54, with family, Full fat	Male, 55+, older family/ empty nester, Full fat
Cardiff	Male, 18-34, pre family, Full fat	Female, 18-34, pre family, Full fat	Female, 18-34, pre family, Semi skimmed	Male, 55+, older family/ empty nester, semi skimmed	Female, 55+, older family/ empty nester, Semi skimmed
Birmingham	Male, 18-34, pre family, Semi skimmed	Female, 18-34, pre family, Semi skimmed	Female, 35-44, young family, Semi skimmed	Male, 55+, older family/ empty nester, Full fat	Female, 55+, older family/ empty nester, Semi skimmed
Belfast	Male, 35-44, young family, Semi skimmed	Female, 18-34, pre family, Semi skimmed	Male, 45-54, with family, Full fat	Male, 55+, older family/ empty nester, Semi skimmed	Female, 55+, older family/ empty nester, Full fat
Leeds	Male, 35-44, young family, Full fat	Male, 35-44, young family, Full fat	Male, 45-54, with family, Semi skimmed	Female, 45-54, with family, Semi skimmed	Female, 55+, older family/ empty nester, Semi skimmed

7.3 Study sample profile (%) : weighted by age, sex, SEG and region



7.4 Study sample profile (%) : weighted by age, sex, SEG and region



7.5 Screener questionnaire: Blind taste test

Good morning/afternoon, my name is from HPI Research, an independent market research agency. We are carrying out a survey about Milk and would like to include your opinion.

To ensure that we are talking to people of all different ages with various backgrounds I just need to ask you a few questions.

SHOWCARD QA

QA Do you or any of your close friends or relatives work in any of the following types of employment?

- | | | |
|--------------------|--|----------------|
| Advertising | | → CLOSE |
| Marketing | | |
| Market research | | |
| Journalism | | |
| The Dairy industry | | |
| Agriculture | | |

None of these		→ CONTINUE
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SHOWCARD QB

QB People consume Milk in a number of ways; on its own or in hot drinks, in cooking, poured over cereal and so on.

Which of the following types of milk do you personally consume on a regular basis?

READ OUT – CODE ALL THAT APPLY

	(17)	
Full fat milk	1	
Semi-skimmed milk	2	→ CONTINUE
1% fat milk	3	
Skimmed milk	4	
Any other kind of milk	5	
(None of these / don't use milk)	6	
Regularly use milk but don't know which types	7	
None of these	8	

We are asking a cross section of people to taste some glasses of milk and give us their opinion. Would you be willing to try two small glasses of milk and tell us what you think of the taste?

The test will take about 10 minutes and we will give you £5 by way of a thank you for your time.

READ OUT: All the milk that we are testing is currently available to buy in your local shops and supermarkets. The milk that you are personally given to try may or may not be the milk that you usually drink

CHECK QUOTAS AND RECRUIT

DISCLAIMER – Milk Research

October 2009

PLEASE READ AND SIGN THE FOLLOWING DECLARATION

- I have agreed to take part in this market research survey.
- I am aged 18 or over.
- I understand that I will be drinking **two small glasses of milk**
- I do not have any allergies to milk or any other dairy products.
- I have not been advised by my doctor or have any medical reason to refrain from consuming milk.
- I am not taking any prescription or over-the-counter (non-prescription) medication for which I have been advised by my doctor, or the label or instructions state, that I should refrain from consuming milk while taking the medication.
- I will not smoke inside the venue.
- I agree to complete the survey as instructed.
- I will leave the venue quietly and orderly once the survey is finished, or at any time if requested to do so by the representatives at the venue.

It must be emphasised that failure to co-operate properly in the test or unruly behaviour will result in you being asked to leave immediately and you will not receive your incentive for attending.

If, with this knowledge, you agree to take part in this test, you must accept that you alone are responsible for your behaviour during and subsequent to the test, and that neither HPI, nor its agents, accept any responsibility for any legal or civil actions taken against you as a direct or indirect result of the milk consumed in the test.

Please print and sign your name below to show you have read and understood and agree to this disclaimer.

RESPONDENT NAME (print): _____

RESPONDENT SIGNATURE: _____

DATE: _____

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7.5 Screener questionnaire: In-home trial

Thanks for your help so far.

We are inviting people taking part in today's test to help us with a follow up project.

We would like to give you a bottle of 1% fat milk to take home to use in the way that you would normally use semi-skimmed milk, for example in hot drinks, on breakfast cereal and so on. You might, for example, have one cup of tea with your usual milk, and the next one with the 1% fat milk to see how it compares.

For your information, the fat content of each type of milk are as follows:

Full fat milk **has a fat content of around 3.6%**

Semi-skimmed **milk has a fat content of around 1.7%**

Skimmed milk **has a fat content of around 0.1%**

1% fat milk has a fat content of around 1%, in between semi-skimmed milk at 1.7% and skimmed milk at 0.1%

In a few days time, we'll call you to ask you a few questions about it, to find out...

- how it compares with the other types of milk that you use
- if it's possible that you might buy it instead of your usual milk, and
- whether it's better for some things than for others

The telephone call will last no more than 10 minutes and we'll arrange to call at a time that is convenient to you.

In order to participate in this part of the study we just need to confirm a few details:

Q1 Do you think that the 1% fat milk will taste...?

TICK ONE

Much too rich

A bit too rich

Just right

Not quite rich
enough

Not at all rich
enough

(61)

 ₁
 ₂
 ₃
 ₄
 ₅

Q2 Do you think the 1% fat milk will taste...?

TICK ONE

Much too
creamy

A bit too
creamy

Just right

Not quite
creamy enough

Not at all
creamy enough

(62)

₁
₂
₃
₄
₅

Q3 Do you think the flavour of the 1% fat milk will be...?

TICK ONE

Much too
strong

A bit too
strong

Just right

A bit too
bland

Much too
bland

(63)

₁
₂
₃
₄
₅

Q4 All things considered, do you think that you will like the taste of this 1% fat milk?

TICK ONE

Yes, I think that
I will like it a lot

Yes, I think that
I will quite like
it

I'm not sure
whether I will
like or dislike it

No, I don't
think that I will
like the taste
that much

No, I don't
think that I will
like the taste at
all

(64)

₁
₂
₃
₄
₅

Contact details:

Name

Home telephone number

Mobile number

Address

Remember, while you are trying this milk please think about how it tastes, how it compares to your original expectations, and whether you might switch to a 1% fat milk in the future.

DISCLAIMER – Milk In-home trial

November 2009

PLEASE READ AND SIGN THE FOLLOWING DECLARATION

- I have agreed to take part in this market research survey.
- I am aged 18 or over.
- I understand that I will be given a bottle of 1% fat milk and agree to try it over the next few days
- I will use it in the normal way, as I usually use milk at home
- I do not have any allergies to milk or any other dairy products.
- I have not been advised by my doctor or have any medical reason to refrain from consuming milk.
- I am not taking any prescription or over-the-counter (non-prescription) medication for which I have been advised by my doctor, or the label or instructions state, that I should refrain from consuming milk while taking the medication.
- I am happy to provide my details and participate in telephone survey about the milk in a few days time

With this knowledge, I agree to take part in this research and accept that I alone am responsible for my behaviour, and that neither HPI, nor its agents, accept any responsibility for any legal or civil actions taken against me as a direct or indirect result of the milk consumed in the test.

Please print and sign your name below to show you have read and understood and agree to this disclaimer.

RESPONDENT NAME (print): _____

RESPONDENT SIGNATURE: _____

DATE: _____

7.6 Screener questionnaire: Mini focus groups

Good morning/afternoon, my name is from HPI Research, an independent market research agency. We are conducting some research about Milk and would like to include your opinion.

To ensure that we are talking to people of all different ages with various backgrounds I just need to ask you a few questions.

SHOWCARD QA

QA Do you or any of your close friends or relatives work in any of the following types of employment?

- Advertising
- Marketing
- Market research →CLOSE
- Journalism
- The Dairy industry
- Agriculture

None of these | →CONTINUE

SHOWCARD QB

QB People consume Milk in a number of ways; on its own or in hot drinks, in cooking, poured over cereal and so on.

Which of the following types of milk do you personally consume on a regular basis?

READ OUT – CODE ALL THAT APPLY

	(17)	
Full fat milk	1	
Semi-skimmed milk	2	→CONTINUE
1% fat milk	3	
Skimmed milk	4	
Any other kind of milk	5	
(None of these / don't use milk)	6	
Regularly use milk but don't know which types	7	
None of these	8	

SHOWCARD QC

QC Which type of Milk do you personally consume **most often**, either on its own or in hot drinks, in cooking, poured over cereal and so on.

READ OUT – CODE ONE ONLY

	(18)	
Full fat milk	1	→check quota
Semi-skimmed milk	2	→check quota
1% fat milk	3	
Skimmed milk	4	
Any other kind of milk	5	

CHECK QUOTA

We are asking a cross section of people to come to [INSERT VENUE] on [INSERT DATE] to take part in a short discussion about Milk.

As part of this research you will be expected to try two small glasses of milk and give use your opinion.

The whole process will take about forty-five minutes and we will give you £15 by way of a thank you for your time.

At the end of the test you will be given two pints of milk to take away with you to use at home as you would normally. Then, in a few days time, we will call you to ask what you thought of it. The follow-up call will last no more than 10 minutes, we'll arrange to call at a time that is convenient to you and we will send you a further £5 by way of thanks.

READ OUT: All the milk that we are testing is currently available to buy in your local shops and supermarkets. The milk that you are personally given to try may or may not be the milk that you usually drink

Date	Venue
Monday 2 nd Nov	Glasgow Buchanan Hotel, 185 Buchanan St, Glasgow, G1 2JY
Tuesday 3 rd Nov	Cardiff Park Hotel, Park Place, Cardiff, CF10 3UD
Wednesday 4 th Nov	Birmingham The Pod, The Whitehouse, 111 New St, B2 4EU
Thursday 5 th Nov	Belfast The Freemason Hall, 95 Crumlin Rd, Belfast, BT14 6AD
Friday 6 th Nov	Leeds Best Western Merrion Hotel, Merrion Centre, Wade Lane, LS2 8NH

DISCLAIMER – Milk Research

October 2009

PLEASE READ AND SIGN THE FOLLOWING DECLARATION

- I have agreed to take part in this market research survey.
- I am aged 18 or over.
- I understand that I will be drinking **two small glasses of milk**
- I do not have any allergies to milk or any other dairy products.
- I have not been advised by my doctor or have any medical reason to refrain from consuming milk.
- I am not taking any prescription or over-the-counter (non-prescription) medication for which I have been advised by my doctor, or the label or instructions state, that I should refrain from consuming milk while taking the medication.
- I will not smoke inside the venue.
- I agree to complete the survey as instructed.
- I will leave the venue quietly and orderly once the survey is finished, or at any time if requested to do so by the representatives at the venue.

It must be emphasised that failure to co-operate properly in the test or unruly behaviour will result in you being asked to leave immediately and you will not receive your incentive for attending.

If, with this knowledge, you agree to take part in this test, you must accept that you alone are responsible for your behaviour during and subsequent to the test, and that neither HPI, nor its agents, accept any responsibility for any legal or civil actions taken against you as a direct or indirect result of the milk consumed in the test.

Please print and sign your name below to show you have read and understood and agree to this disclaimer.

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7.7 In-home trial instructions

Thanks for your help so far.

We have given you a bottle of milk to take home to use in the way that you would normally use semi-skimmed milk, for example in hot drinks, on breakfast cereal and so on. You might, for example, have one cup of tea with your usual milk, and the next one with this milk to see how it compares.

In a few days time, we'll call you to ask you a few questions about it, to find out, how it compares with the other types of milk that you use, if it's possible that you might buy it instead of your usual milk, whether it's better for some things than for others, and so on.

The telephone call will last no more than 10 minutes, we'll arrange to call at a time that is convenient to you and will send you **£5 for your co-operation**.

While you are trying this milk please think about how it tastes, how it compares to your original expectations, and whether you might switch to this milk in the future.

Please use the area below to make a few notes about how you used this milk and your opinion of it so that you can refer to it when we call you back.

How did you use the milk?

What did you think of it?

7.8 Blind taste test: measures used to ensure a controlled, unbiased test

Hall test



- Milk pre-ordered from local Sainsbury's (varied by sample point), delivered to venues and loaded directly into fridges
- All taste test milk stored in one fridge to ensure that a comparable temperature was maintained
- Milk poured into a pre-washed hi-ball glass (stored at room temperature)
 - one third of a glass per respondent
- Respondent served milk at a table, in isolation, and asked to drink at least half before completing the questionnaire
- First glass removed before second glass presented
- Milk rotated to avoid order effect

7.9 Test questionnaire: Blind taste test

Name: _____

Tried first		(11)
B1	<input type="checkbox"/>	1
A2	<input type="checkbox"/>	2

First Glass

We are testing a range of different types of milk today. All the milk that we are testing is currently available to buy in your local shops and supermarkets. The milk that you are personally given to try may or may not be the milk that you usually drink.

Here is your first glass.

Please taste the milk. You don't have to drink all of it but please drink at least half.

Q1 All things considered, how much do you like the taste of the milk?

Liked the taste a lot	Quite liked the taste	Neither liked nor disliked the taste	Didn't like the taste that much	Didn't like the taste at all	(12)
<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	

Q2a How would you describe the colour of this milk?

Very appealing	Quite appealing	Neither appealing nor unappealing	Quite unappealing	Very unappealing	(13)
<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	

Q2b Does the milk look...?

Much too rich and creamy	A bit too rich and creamy	Just right	A bit too thin and watery	Much too thin and watery	(14)
<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	

Q3a Did you find this milk...?

Much too rich	A bit too rich	Just right	Not quite rich enough	Not at all rich enough	(15)
<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	

Q3b Did it taste...?

Much too creamy A bit too creamy Just right Not quite creamy enough Not at all creamy enough (16)

₁ ₂ ₃ ₄ ₅

Q3c Would you describe the flavour as being...?

Much too strong A bit too strong Just right A bit too bland Much too bland (17)

₁ ₂ ₃ ₄ ₅

Q3d Would you consider this milk as an alternative to your usual semi-skimmed?

Yes, definitely Yes, probably Possibly No, probably not No, definitely not (18)

₁ ₂ ₃ ₄ ₅

Q3e If your usual semi-skimmed milk was unavailable would you be happy to use this milk instead?

Yes, very happy Yes, quite happy Neither happy nor unhappy No, quite unhappy No, very unhappy (19)

₁ ₂ ₃ ₄ ₅

Q4 Assuming that this milk was the same price as your usual semi-skimmed, how likely would you be to buy this milk or ask someone to buy it for you the next time you went to your usual shop or supermarket?

Definitely Probably Possibly Probably not Definitely not (20)

₁ ₂ ₃ ₄ ₅

Q5 Again, assuming that this milk was the same price as your usual semi-skimmed and was widely available in the shops that you visit, do you think that you would switch from your usual semi-skimmed?

Definitely switch to this Probably switch to this Possibly switch to this Probably not Definitely not (21)

₁ ₂ ₃ ₄ ₅

Please tell the test supervisor that you have completed this section and are ready for your second glass

Tried second		(22)
B1	<input type="checkbox"/>	1
A2	<input type="checkbox"/>	2

Second Glass

Here is your second glass.

Please taste the milk. Again, you don't have to drink all of it but please drink at least half.

Q1 All things considered, how much do you like the taste of the milk?

Liked the taste a lot	Quite liked the taste	Neither liked nor disliked the taste	Didn't like the taste that much	Didn't like the taste at all	(23)
<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	

Q2a How would you describe the colour of this milk?

Very appealing	Quite appealing	Neither appealing nor unappealing	Quite unappealing	Very unappealing	(24)
<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	

Q2b Does the milk look...?

Much too rich and creamy	A bit too rich and creamy	Just right	A bit too thin and watery	Much too thin and watery	(25)
<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	

Q3a Did you find this milk...?

Much too rich	A bit too rich	Just right	Not quite rich enough	Not at all rich enough	(26)
<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	

Q3b Did it taste...?

Much too creamy	A bit too creamy	Just right	Not quite creamy enough	Not at all creamy enough	(27)
<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	

Q3c Would you describe the flavour as being...?

Much too strong	A bit too strong	Just right	A bit too bland	Much too bland	(28)
<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	

Q3d Would you consider this milk as an alternative to your usual semi-skimmed?

Yes, definitely	Yes, probably	Possibly	No, probably not	No, definitely not	(29)
<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	

Q3e If your usual semi-skimmed milk was unavailable would you be happy to use this milk instead?

Yes, very happy	Yes, quite happy	Neither happy nor unhappy	No, quite unhappy	No, very unhappy	(30)
<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	

Q4 Assuming that this milk was the same price as your usual semi-skimmed, how likely would you be to buy this milk or ask someone to buy it for you the next time you went to your usual shop or supermarket?

Definitely	Probably	Possibly	Probably not	Definitely not	(31)
<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	

Q5 Again, assuming that this milk was the same price as your usual semi-skimmed and was widely available in the shops that you visit, do you think that you would switch from your usual semi-skimmed?

Definitely switch to this	Probably switch to this	Possibly switch to this	Probably not	Definitely not	(32)
<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	

Please tell the test supervisor that you have completed this section and give them your questionnaire

Comparison

Interviewer administered:

READ OUT: Now that you have tried two glasses of milk please tell me:

Q6a Were you able to taste any difference between the first glass and the second glass?

CODE ONE

(33)

Yes	<input type="checkbox"/>	1
No	<input type="checkbox"/>	2

IF YES, ASK Q6b, IF NO GO TO Q7

Q6b Would you say that they tasted...?

READ OUT - CODE ONE

(34)

... very different	<input type="checkbox"/>	1
OR, that they tasted similar but there was a difference	<input type="checkbox"/>	2

ASK ALL –INTERVIEWER – CHECK ORDER THAT THEY TRIED THE MILK

Q7 If B1 contained less fat than your usual semi-skimmed, how likely would you be to switch to this milk if it was the same price as your usual semi-skimmed and was widely available in the shops that you visit?

Definitely switch to this	Probably switch to this	Possibly switch to this	Probably not	Definitely not	(35)
<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	

Q8 If A2 contained less fat than your usual semi-skimmed, how likely would you be to switch to this milk if it was the same price as your usual semi-skimmed and was widely available in the shops that you visit?

Definitely switch to this	Probably switch to this	Possibly switch to this	Probably not	Definitely not	(36)
<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	

General questions – Part A

Q7a Where do you **normally** buy your milk from? i.e. where do you go most often for milk

PLEASE TICK ONE ONLY

(11-12)

- | | | |
|---|--------------------------|---|
| ASDA | <input type="checkbox"/> | 1 |
| Co-Op | <input type="checkbox"/> | 2 |
| Marks and Spencer | <input type="checkbox"/> | 3 |
| Morrison's | <input type="checkbox"/> | 4 |
| Tesco | <input type="checkbox"/> | 5 |
| Sainsbury's | <input type="checkbox"/> | 6 |
| Somerfield | <input type="checkbox"/> | 7 |
| Waitrose | <input type="checkbox"/> | 8 |
| Discount supermarket e.g. Netto, Aldi, Lidl | <input type="checkbox"/> | 9 |
| Corner shop or garage | <input type="checkbox"/> | 0 |
| Delivered by the milk man | <input type="checkbox"/> | x |
| Other | <input type="checkbox"/> | 1 |

Q7b Where else do you get your milk from on a regular basis, at least once a month?

PLEASE TICK ALL OTHER PLACES THAT YOU REGULARLY BUY MILK

(13-14)

- | | | |
|---|--------------------------|---|
| ASDA | <input type="checkbox"/> | 1 |
| Co-Op | <input type="checkbox"/> | 2 |
| Marks and Spencer | <input type="checkbox"/> | 3 |
| Morrison's | <input type="checkbox"/> | 4 |
| Tesco | <input type="checkbox"/> | 5 |
| Sainsbury's | <input type="checkbox"/> | 6 |
| Somerfield | <input type="checkbox"/> | 7 |
| Waitrose | <input type="checkbox"/> | 8 |
| Discount supermarket e.g. Netto, Aldi, Lidl | <input type="checkbox"/> | 9 |
| Corner shop or garage | <input type="checkbox"/> | 0 |
| Delivered by the milk man | <input type="checkbox"/> | x |
| Other | <input type="checkbox"/> | 1 |

Q8 Thinking about food/grocery shopping, which of these best describes the level of responsibility you have for the shopping in your household?

TICK ONE

(15)

- | | | |
|--|--------------------------|---|
| Responsible for all or most of the food/ grocery shopping | <input type="checkbox"/> | 1 |
| Responsible for about half of the food/ grocery shopping | <input type="checkbox"/> | 2 |
| Responsible for less than half of the food/grocery shopping | <input type="checkbox"/> | 3 |
| Not responsible for any of the food/grocery shopping | <input type="checkbox"/> | 4 |

Q9 **When you are out buying food, which, if any, of the following do you look for on the labels?**

TICK ALL THAT APPLY

- | | | |
|---------------|--------------------------|------|
| | | (16) |
| Vitamins | <input type="checkbox"/> | 1 |
| Calcium | <input type="checkbox"/> | 2 |
| Salt | <input type="checkbox"/> | 3 |
| Fat | <input type="checkbox"/> | 4 |
| Saturated fat | <input type="checkbox"/> | 5 |
| Carbohydrate | <input type="checkbox"/> | 6 |
| Sugar | <input type="checkbox"/> | 7 |
| Calories | <input type="checkbox"/> | 8 |
| Iron | <input type="checkbox"/> | 9 |
| Pro-biotics | <input type="checkbox"/> | 0 |
| Omega 3 | <input type="checkbox"/> | X |
| Non of these | <input type="checkbox"/> | v |

Q10a **If a new product food is advertised as being lower in fat, how likely would you to consider it?**

- | | | | | | |
|-----------------------------|-----------------------------|-----------------------------|-----------------------------|------------------------------------|------|
| Very likely | Quite likely | Quite unlikely | Very unlikely | It depends entirely on the product | (17) |
| <input type="checkbox"/> _1 | <input type="checkbox"/> _2 | <input type="checkbox"/> _3 | <input type="checkbox"/> _4 | <input type="checkbox"/> _5 | |

Q10b **If a new product is advertised as being lower in calories, how likely would you to consider it?**

- | | | | | | |
|-----------------------------|-----------------------------|-----------------------------|-----------------------------|------------------------------------|------|
| Very likely | Quite likely | Quite unlikely | Very unlikely | It depends entirely on the product | (18) |
| <input type="checkbox"/> _1 | <input type="checkbox"/> _2 | <input type="checkbox"/> _3 | <input type="checkbox"/> _4 | <input type="checkbox"/> _5 | |

Skip 19

Q10c **If a new product food is advertised as being lower in saturated fat, how likely would you to consider it?**

- | | | | | | |
|-----------------------------|-----------------------------|-----------------------------|-----------------------------|------------------------------------|------|
| Very likely | Quite likely | Quite unlikely | Very unlikely | It depends entirely on the product | (20) |
| <input type="checkbox"/> _1 | <input type="checkbox"/> _2 | <input type="checkbox"/> _3 | <input type="checkbox"/> _4 | <input type="checkbox"/> _5 | |

**Q11 How often do you have low fat versions of dairy products instead of full fat versions?
Dairy products include things like cheese, spreads and yogurts.**

TICK ONE

Always/ most
of the time

Quite often

Sometimes

Occasionally or
hardly ever

It depends
entirely on the
product

(21)

₁
₂
₃
₄
₅

Q12 Are you currently taking any of the following measures in relation to healthy eating?

TICK ALL THAT APPLY

(22)

- | | | |
|--|--------------------------|---|
| I am eating more fruit and veg | <input type="checkbox"/> | 1 |
| I am eating more starchy foods | <input type="checkbox"/> | 2 |
| I am drinking less alcohol | <input type="checkbox"/> | 3 |
| I am drinking more water | <input type="checkbox"/> | 4 |
| I am avoiding salt | <input type="checkbox"/> | 5 |
| I am eating less fat | <input type="checkbox"/> | 6 |
| I am trying to cut down on saturated fat | <input type="checkbox"/> | 7 |
| I am eating less sugar | <input type="checkbox"/> | 8 |
| I am consuming fewer calories | <input type="checkbox"/> | 9 |
| None of the above | <input type="checkbox"/> | 0 |

ANSWER Q13 IF YOU ARE TAKING MEASURES TO EAT LESS FAT?

Q13 Why have you decided to eat less fat?

TICK ALL THAT APPLY

- (23)
- | | | |
|--|--------------------------|---|
| To lose weight | <input type="checkbox"/> | 1 |
| To attain a healthier lifestyle | <input type="checkbox"/> | 2 |
| To avoid trans fats | <input type="checkbox"/> | 3 |
| To avoid saturated fats | <input type="checkbox"/> | 4 |
| To avoid hydrogenated fats | <input type="checkbox"/> | 5 |
| I have a health condition and have been advised to reduce my fat intake by a health professional | <input type="checkbox"/> | 6 |
| Other (please specify below) | <input type="checkbox"/> | 7 |
-

Q14 How would you rate the extent to which healthy eating is a priority in your life on a scale of 1 to 10, where 10 is very high and 1 is very low?

(write in a score between 1 and 10) _____ (24-25)

General questions – Part B

Q15 **Different types of milk contain different levels of fat.**

Three types of milk are listed below. Please estimate the fat content for each.

			Don't know
Full fat milk	_____ %	(26-28)	<input type="checkbox"/>
Semi-skimmed milk	_____ %	(29-31)	<input type="checkbox"/>
Skimmed milk	_____ %	(32-34)	<input type="checkbox"/>

Please tell the test supervisor that you have completed this section

General questions – Part C

Q16 Have you seen or heard of 1% fat milk?

(35)

- Yes 1
- No 2

**Q17 Have you ever personally consumed or used 1% fat milk?
Tick as many ways as apply**

(36)

- No, not knowingly 1
- Yes – used it before....
 - ...in hot drinks 2
 - ...on breakfast cereal 3
 - ...on its own, as a drink 4
 - ...in milk shakes 5
 - ...in cooking 6
 - ...for other things 7

Only answer Q18 if you have heard of 1% fat milk but never tried it.

Q18 In your own words, please describe the reasons why you have you never tried 1% fat milk in the past?

(37-39)

ALL ANSWER

Q19 Think now about the milk that you personally consume, by this I mean you yourself and not others in your household.

Please enter a rough breakdown of your total milk consumption by type below. If you just use one type put 100% next to that type, but if you use more than one type you should put x% next to e.g. semi-skimmed and x% next to e.g. full fat milk so that it then adds to 100%

Full fat milk	_____ %	(40-41)
Semi-skimmed milk	_____ %	(42-43)
1% fat milk	_____ %	(44-45)
Skimmed milk	_____ %	(46-47)
Other type of milk	_____ %	(48-49)
100%		

Q20 In total how many pints of milk does your household get through in a typical week nowadays?

(50)		
1-2	<input type="checkbox"/>	1
3-4	<input type="checkbox"/>	2
5-6	<input type="checkbox"/>	3
7-8	<input type="checkbox"/>	4
9-10	<input type="checkbox"/>	5
11-15	<input type="checkbox"/>	6
16-20	<input type="checkbox"/>	7
21 or more	<input type="checkbox"/>	8

Q21 Please enter a rough breakdown of your total household milk consumption by type below. For example, 80% full fat, 20% semi-skimmed, or 100% semi-skimmed.

Full fat milk	_____ %	(51-52)
Semi-skimmed milk	_____ %	(53-54)
1% fat milk	_____ %	(55-56)
Skimmed milk	_____ %	(57-58)
Other type of milk	_____ %	(59-60)
100%		

Thank you. That is the end of the test.

Please take this questionnaire to the check desk to receive you incentive

7.10 Test questionnaire: In-home trial telephone recalls

Good morning / afternoon / evening, my name is and I'm calling from HPI. You recently helped us with some research in a few days ago and we gave you a bottle of 1% fat milk to use at home.

Now that have had the chance to use the milk at home I'd like to ask you a few questions about it. The interview will last about 5 minutes.

QA. Firstly, can I just check, have you had time to use the milk at home?

1. Yes – continue
2. No – arrange appointment to call back

Q1a In which of the following ways do you, by this I mean you personally, use your usual semi-skimmed milk?

ROTATE – READ OUT – CODE ALL THAT APPLY

1. In hot drinks
2. Over cereal
3. As a drink, on its own
4. In milk shakes
5. In cooking
6. In other ways (record response)

Q1b And in which of the following ways did you, by this I mean you personally, use the 1% fat milk that we gave you to try?

ROTATE – READ OUT – CODE ALL THAT APPLY

1. In hot drinks
2. Over cereal
3. As a drink, on its own
4. In milk shakes
5. In cooking
6. In other ways (record response, prompt answers from Q1a “other”)

Q1c Were you able to taste any difference between the 1% fat milk and your usual semi-skimmed?

DO NOT READ OUT - PROMPT TO PRECODE

1. Yes
2. No

IF YES AT Q1c ASK Q1d, IF NOT GO TO Q1e

Q1d Were you say that 1% fat tasted...?

READ OUT – CODE ONE

1. very different to your usual semi-skimmed
2. quite similar to your usual semi-skimmed but there was a difference

FOR EACH CODED AT Q1b

Q1e How acceptable did you find the 1% fat milk when you used it [INSERT CODED FROM Q1e] ...

READ OUT – CODE ONE

1. Perfectly acceptable
2. Quite acceptable
3. Not very acceptable
4. Not at all acceptable

Q2a Did anyone else in your household use the 1% fat milk?

CODE ALL THE APPLY

1. No, only I used it
2. Yes, other adults used it (partner, friend, family etc)
3. Yes, children used it

IF CHILDREN CODED AT Q2A, ASK Q2B AND Q2C. OTHERS GO TO Q3

Q2b What were the ages of the children that used the milk?

CODE ALL THE APPLY

1. 0 – 4 yrs
2. 5 – 10 yrs
3. 11 – 15
4. 16 – 18
5. Over 18yrs

Q2c Did your child / any of your children notice the switch to 1% fat milk?

READ OUT - CODE ONE

1. Yes
2. No

IF YES AT Q2C ASK Q2D. OTHERS GO TO Q3

Q2d How did your child/children respond to the switch? Would you say...

READ OUT - CODE ONE

1. They liked it
2. They didn't like it
3. They couldn't taste any difference
4. Don't know

ROTATE Q3 and Q4

Q3 What, if anything, did you particularly like about the 1% fat milk?

RECORD VERBATIM – PROBE TO NEGATIVE

Q4 What, if anything, did you particularly dislike about the 1% fat milk?

RECORD VERBATIM – PROBE TO NEGATIVE

READ OUT

Q5 When we gave you the 1% fat milk did you understand that it was a healthier alternative to semi-skimmed?

PROMPT TO PRECODE

1. Yes, I knew it was healthier than semi-skimmed
2. No sure but I thought that it was probably healthier than semi-skimmed
3. No, I did not know that it was healthier than semi-skimmed

READ OUT

When we first gave you the 1% fat milk to try we explained that different types of milk contained different levels of fat.

Q6a Can you remember the fat content of full fat milk?

1. Yes – record
2. No

Q6b Can you remember the fat content of semi-skimmed milk?

1. Yes – record
2. No

Q6c Can you remember the fat content of skimmed milk?

1. Yes – record
2. No

READ OUT

The fat content of each type of milk are as follows:

Full fat milk has a fat content of around 3.6%

Semi-skimmed milk has a fat content of around 1.7%

Skimmed milk has a fat content of around 0.1%

1% fat milk has a fat content of around 1%, in between semi-skimmed milk at 1.7% and skimmed milk at 0.1%

Please think back to when we gave you the 1% milk. We are interested in what your initial thoughts were when we first gave you the milk, before you took it home to try.

Q7a Did you think that the milk would taste...?

CODE ONE

1. Much too rich
2. A bit too rich
3. Just right

4. Not quite rich enough
5. Not at all rich enough

Q7b Did you think that it would taste...?

CODE ONE

1. Much too creamy
2. A bit too creamy
3. Just right
4. Not quite creamy enough
5. Not at all creamy enough

Q7c Did you think that the flavour would be ...?

CODE ONE

1. Much too strong
2. A bit too strong
3. Just right
4. A bit too bland
5. Much too bland

Q7d And all things considered, did you think that you would like the taste of 1% fat milk? ...

CODE ONE

1. Yes, I thought I would like it a lot
2. Yes, I thought I would quite like it
3. I want not sure whether I would like or dislike it
4. No, I didn't think that I would like the taste that much
5. No, I didn't think that I would like the taste at all

Q8a Since having tried 1% fat milk at home, has your opinion of 1% fat milk changed at all?

PROMPT TO PRECODE - CODE ONE

1. Yes
2. No

IF YES AT Q8a ASK Q8b AND Q9. OTHERS GO TO Q10a

Q8b Has your opinion of 1% fat milk gone up or down?

PROMPT TO PRECODE - CODE ONE

1. Opinion of 1% fat milk has improved / gone up
2. Opinion of 1% fat milk has gone down

Q9 Why do you say that?

RECORD VERBATIM – PROBE TO NEGATIVE

ASK ALL

Q10a Did you find that the milk tasted...?

CODE ONE

1. Much too rich
2. A bit too rich
3. Just right
4. Not quite rich enough
5. Not at all rich enough

Q10b Did you find that the milk tasted...?

CODE ONE

1. Much too creamy
2. A bit too creamy
3. Just right
4. Not quite creamy enough
5. Not at all creamy enough

Q10c Would you describe the flavour of the 1% fat milk as being...?

CODE ONE

1. Much too strong
2. A bit too strong
3. Just right
4. A bit too bland
5. Much too bland

Q10d And all things considered, having tried it, which of the following best describe your opinion of the taste of the 1% fat milk? ...

CODE ONE

1. I liked the taste a lot
2. I quite liked the taste
3. Neither liked nor disliked the taste
4. I didn't like the taste that much
5. I didn't like the taste at all

Q11 Would you consider this milk as an alternative to your usual semi-skimmed? ...

CODE ONE

1. Yes, definitely
2. Yes, probably
3. Possibly
4. No, probably not
5. No, definitely not

Q12 If your usual semi-skimmed milk was unavailable would you be happy to use this milk instead?

CODE ONE

1. Yes, very happy
2. Yes, quite happy
3. Neither happy nor unhappy
4. No, quite unhappy
5. No, very unhappy

Q13 Assuming that this milk was the same price as your usual semi-skimmed, how likely would you be to buy this milk or ask someone to buy it for you the next time you went to your usual shop or supermarket? ...

CODE ONE

1. Definitely
2. Probably
3. Possibly
4. Probably not
5. Definitely not

Q14 Why do you say that?
RECORD VERBATIM – PROBE TO NEGATIVE

Q15 Assuming that this milk was the same price as your usual semi-skimmed and was widely available in the shops that you visit, do you think that you would switch from your usual semi-skimmed?
CODE ONE

1. Yes, definitely switch to this
2. Yes, probably switch to this
3. Possibly switch to this
4. Probably not switch to this
5. Definitely not switch to this

Q16 Experts are telling us that 1% fat milk is even healthier for you than semi-skimmed.

Again, assuming that it's the same price as your usual semi-skimmed and widely available, on the basis of expert opinion do you think that you would switch from your usual semi-skimmed?
CODE ONE

1. Yes, definitely switch to this
2. Yes, probably switch to this
3. Possibly switch to this
4. Probably not switch to this
5. Definitely not switch to this

Thank and close

7.11 Mini focus group coverage guide

Format

- Five mini groups per venue, 3-4 respondents per group
- c20-25 mins duration
- Exact questions/flow will vary by group but follow a structure as outlined below

Content**5 mins****1. Current usage and attitudes towards milk – personal and household**

- which types they use
- how much they use
- what they use it for
 - does use vary by type i.e. does the same person buy different types to fulfil different needs?
 - does use vary across the household, if so, why?
- have usage and attitudes patterns changed over time e.g. have they tried to cut down on milk and or other dairy products?
- if, when and how moved from full fat to semi skimmed (note that semi-skimmed milk became widely available in 80s)
- factors driving this change
- how milk fits within their diet as a whole i.e. is it seen as an essential part of their diet?
- **awareness of and attitude towards attributes of different types of milk - fat content, saturated fat content , carbohydrate, calories, calcium etc.**

2. Does milk use reflect overall attitude to health and healthy eating**5 mins**

- how the milk use compares with use of and attitude toward other food and drink categories with low fat/diet options
 - cheese/yoghurt/spreads/cream etc
 - diet Cola v regular, bottle v freshly squeezed juice, water cf. carbonates
-

3. 1% Fat milk

10 mins

- existing awareness/familiarity and quality/source of awareness
- consumption to date
 - if so: what stimulated initial trial and repeat consumption
 - if not: why not – inertia (don't know anything about it etc) vs. rejection (sounds bland) and effect of test on future interest
- opinion of taste post trial
 - overall
 - vs expectations
 - vs. full fat, semi-skimmed and skimmed
 - ability to determine a difference in the test?

4. Future purchase/consumption intent for 1% fat milk

5 mins

- overall likelihood to purchase
- **main factors driving decision** - taste, concept or both?
Importance of fat, saturate fat, carbohydrate, calories?
 - potential uses (hot drinks, cereal, as a drink)
 - who might use extend to (self, partner, children)
- potential displacement (full fat, semi-skimmed or skimmed)
- **barriers to switching** to 1% milk from semi-skimmed ?
 - what, if anything, might encourage consumers to switch