

BESPOKE SURVEYS

Milk Alternatives Vol 3

1,250+ US Consumers, Balanced to Census

CHECK BREAKDOWN:

TREND CHECKS

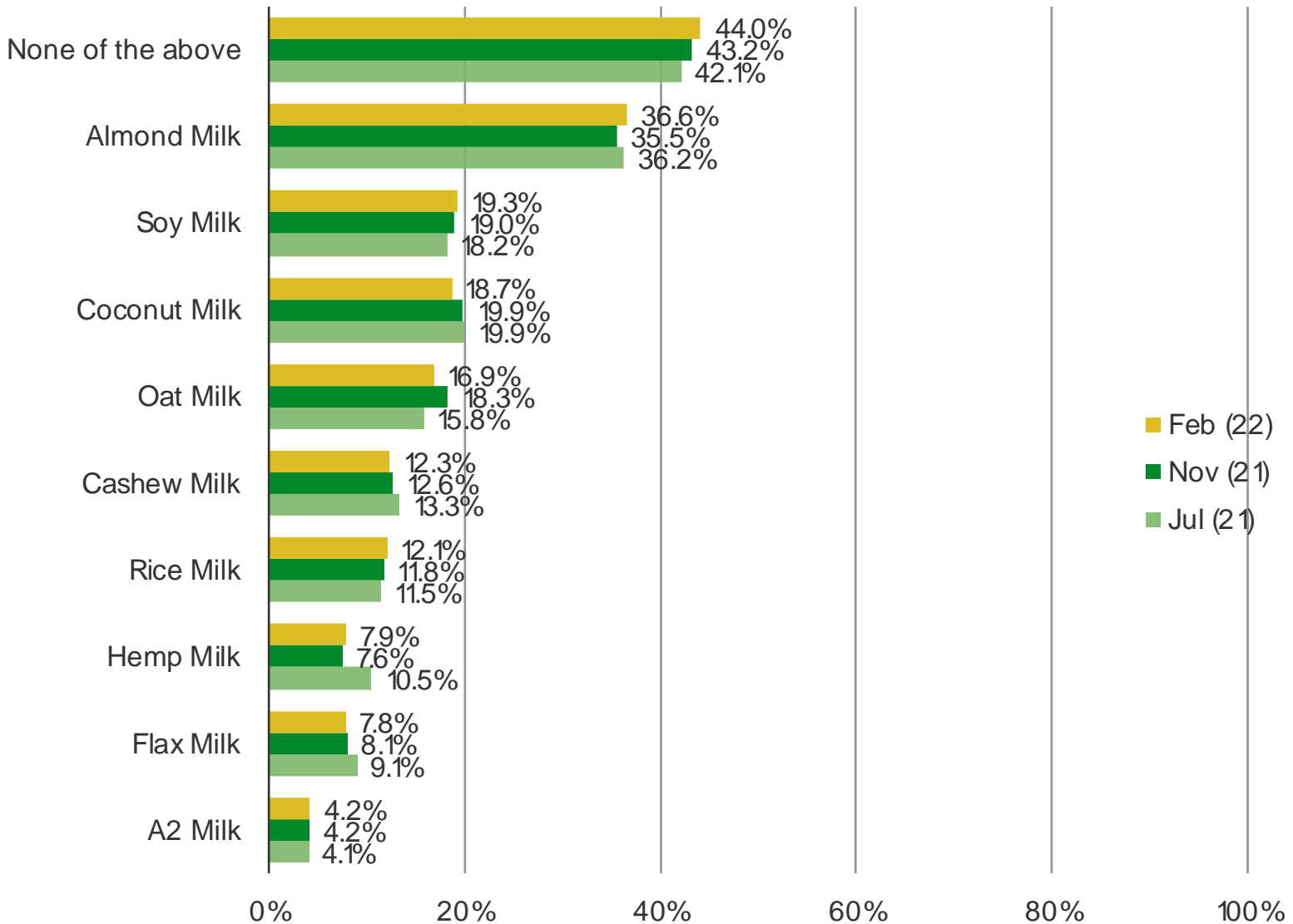
MILK ALTERNATIVES

- Consumption of alternative milk products is tracking flat sequentially across most categories we track regularly.
- After almond and soy milk, consumers think oat milk is the healthiest.
- Taste and perceived health benefits remain the top two factors that continue to drive alternative milk type consumption decisions.
- In our trackers, Oatly continues to have the most mindshare as evidenced by unaided awareness.

MILK ALTERNATIVES

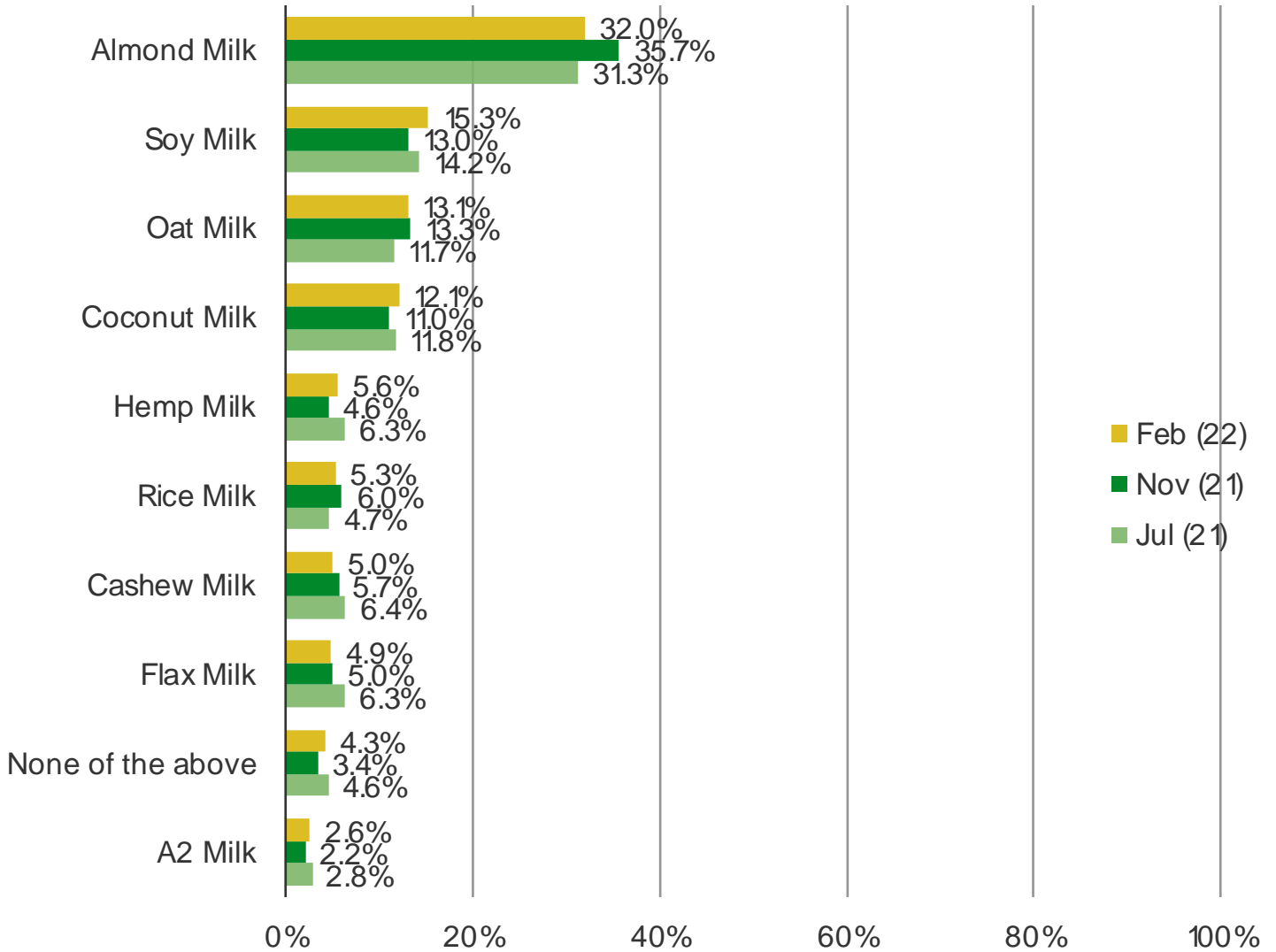
DO YOU REGULARLY OR OCCASIONALLY USE ANY OF THE FOLLOWING MILK ALTERNATIVES? SELECT ALL THAT APPLY

Posed to all respondents



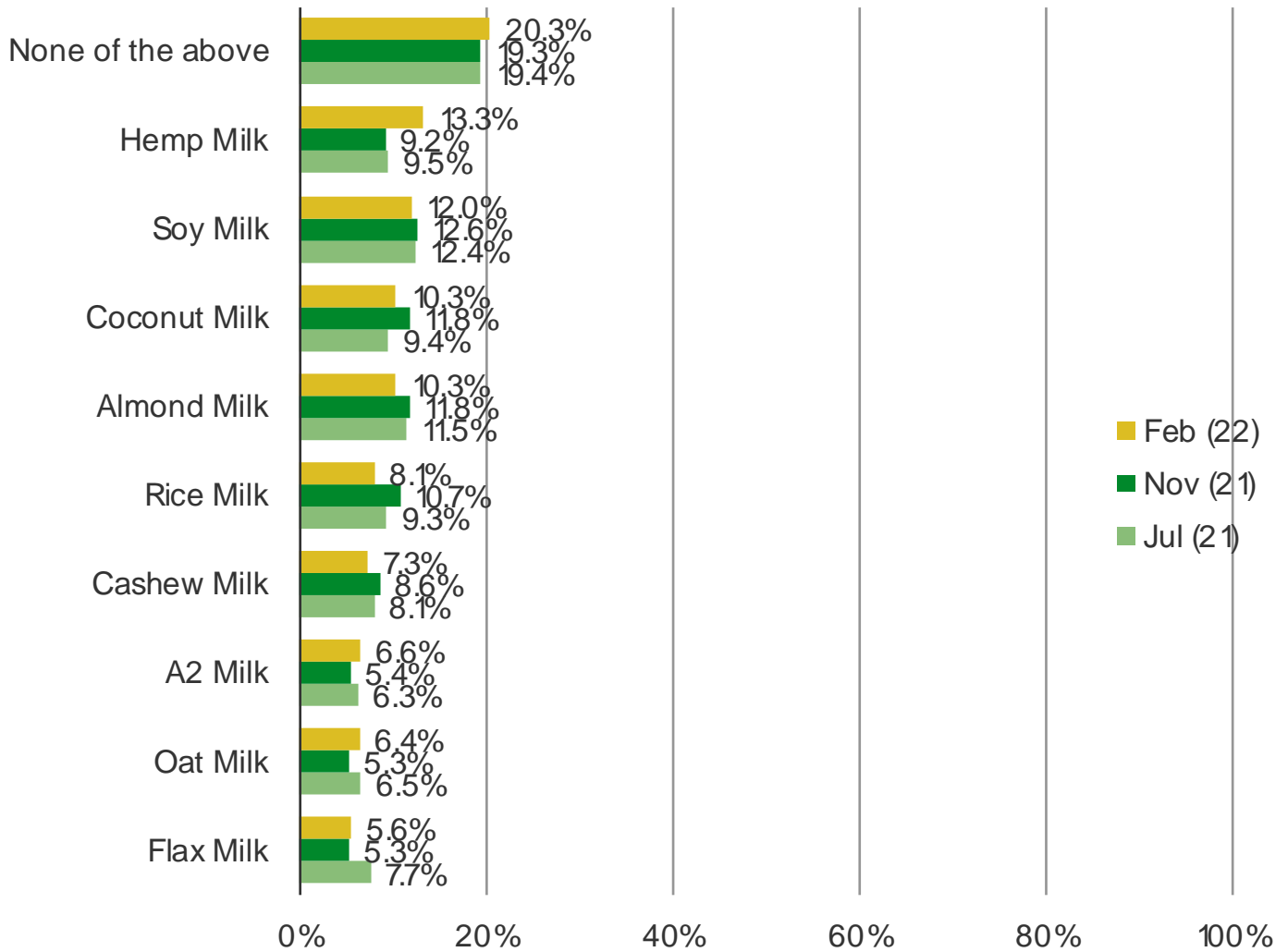
WHICH ALTERNATIVE MILK TYPE DO YOU FEEL IS THE HEALTHIEST?

Posed to all respondents who use milk alternatives regularly or occasionally.



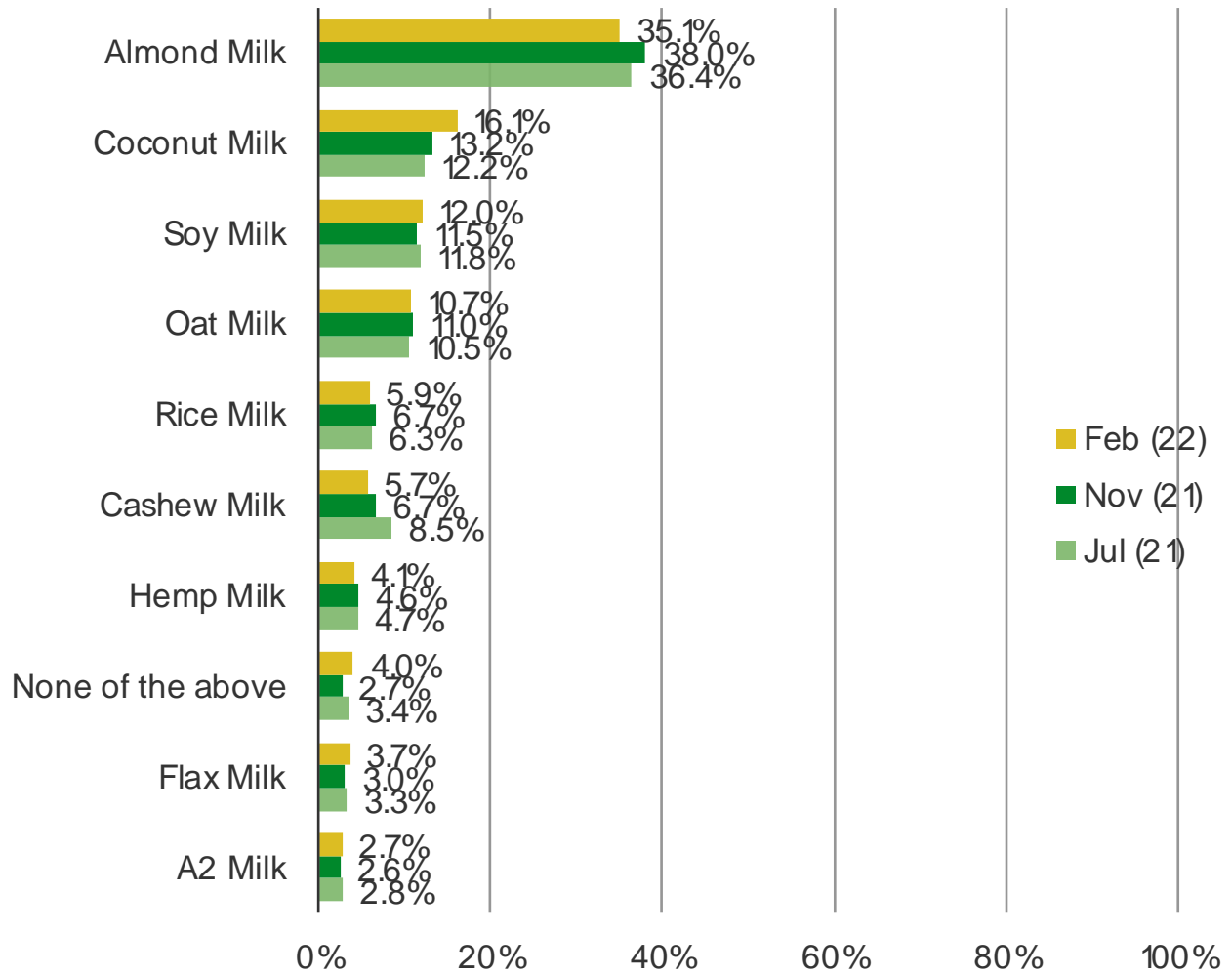
WHICH ALTERNATIVE MILK TYPE DO YOU FEEL IS THE LEAST HEALTHY?

Posed to all respondents who use milk alternatives regularly or occasionally.



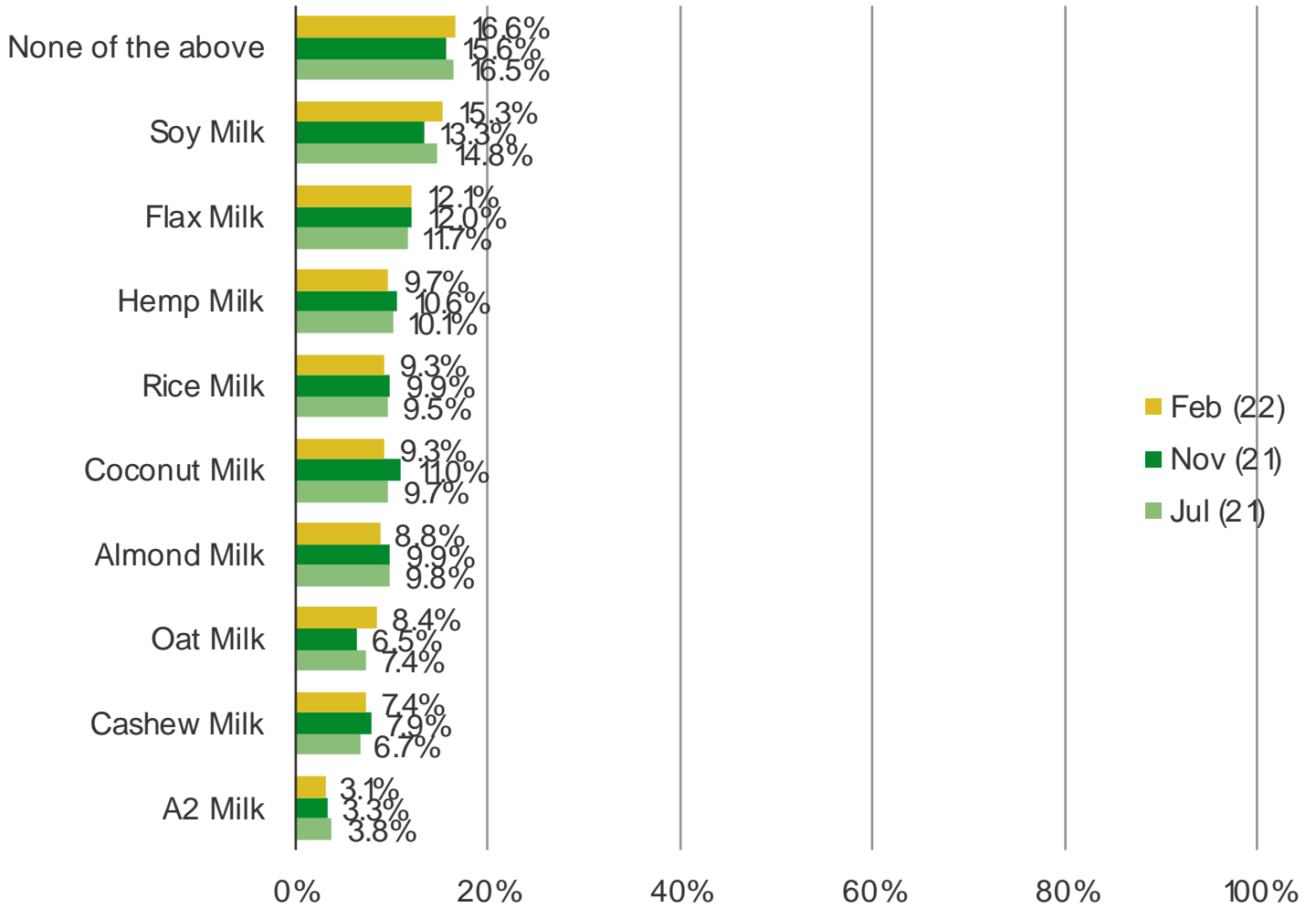
WHICH ALTERNATIVE MILK TYPE DO YOU FEEL IS THE TASTES THE BEST?

Posed to all respondents who use milk alternatives regularly or occasionally.



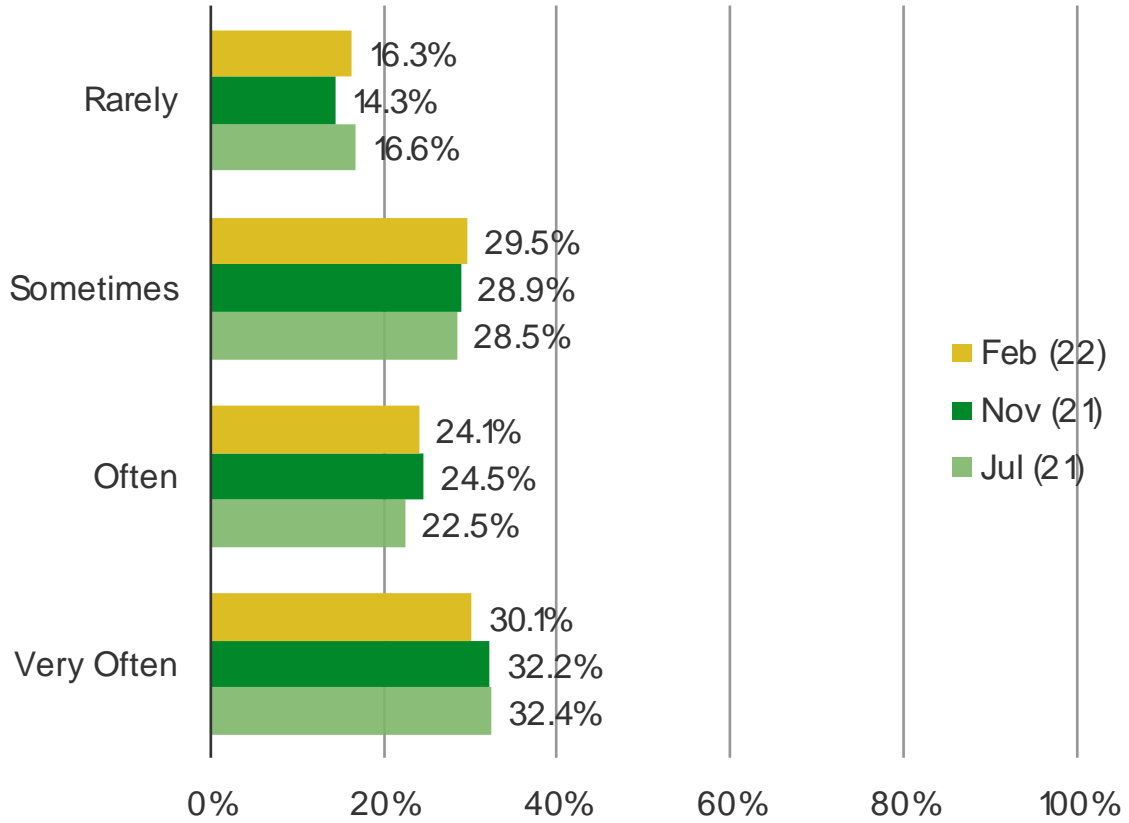
WHICH ALTERNATIVE MILK TYPE DO YOU FEEL TASTES THE WORST?

Posed to all respondents who use milk alternatives regularly or occasionally.



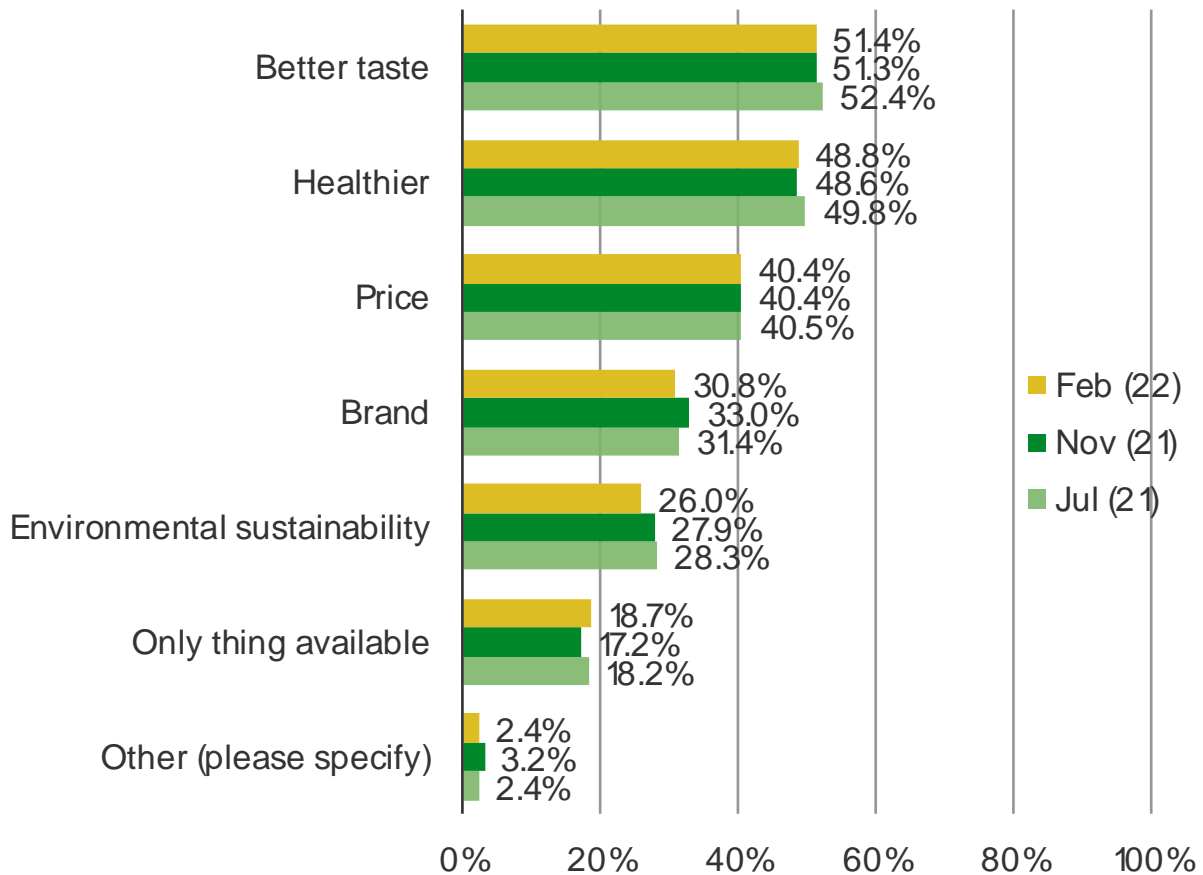
HOW OFTEN DO YOU DRINK NON-DAIRY ALTERNATIVE MILK?

Posed to all respondents who consume one or more milk alternatives regularly or occasionally.



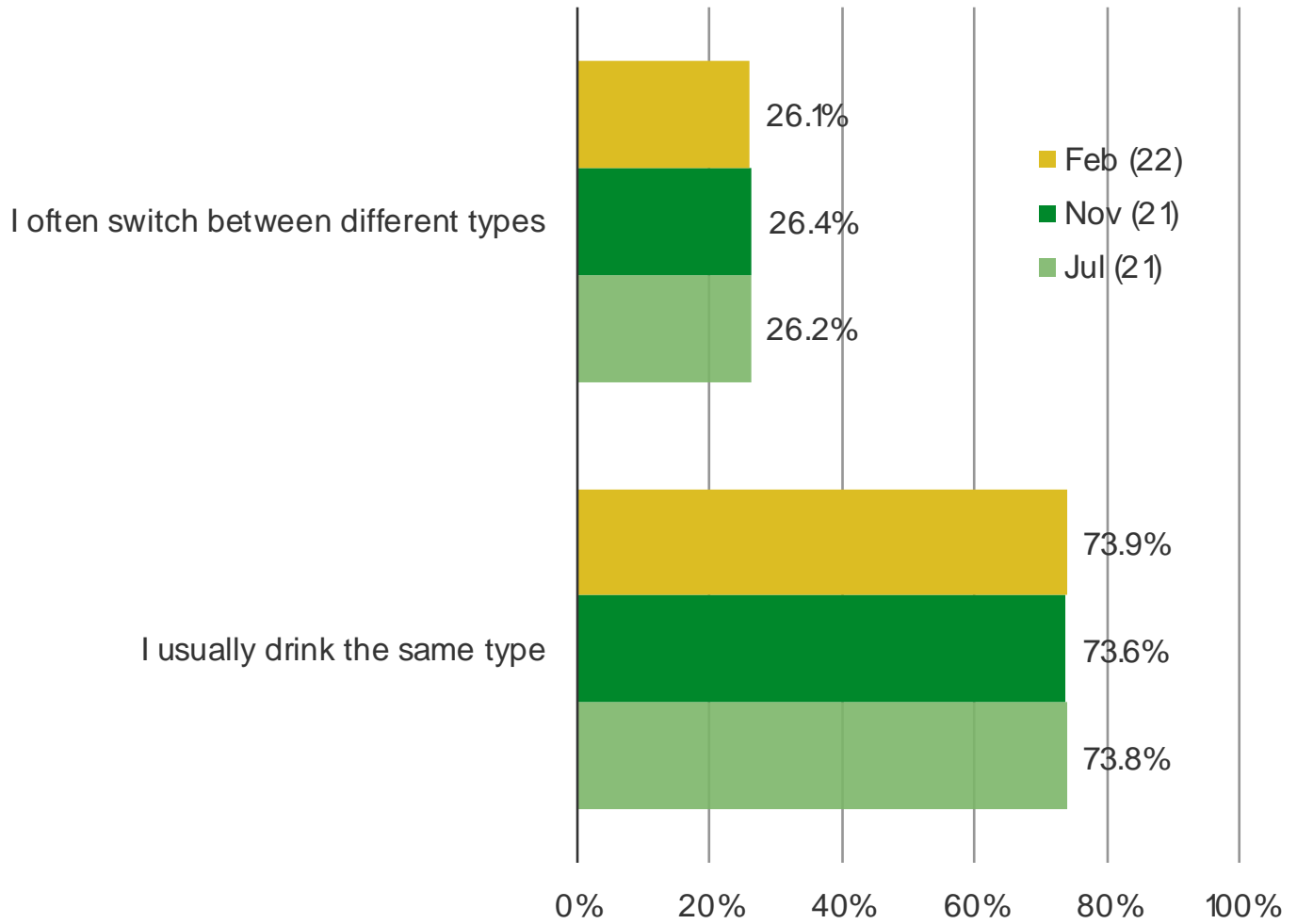
THINKING OF THE DIFFERENT TYPES OF ALTERNATIVE MILKS AVAILABLE (ALMOND, OAT, SOY, RICE, COCONUT, A2, ETC), WHAT MAKES YOU CHOOSE TO CONSUME ONE OVER THE OTHERS? SELECT ALL THAT APPLY

Posed to all respondents who use milk alternatives regularly or occasionally.



DO YOU ALWAYS DRINK THE SAME TYPE OF ALTERNATIVE MILK (IE, ALMOND MILK, OAT MILK, RICE MILK, ETC), OR DO YOU SWITCH BETWEEN TYPES?

Posed to all respondents who use milk alternatives regularly or occasionally.



WHY DO YOU SWITCH BETWEEN DIFFERENT TYPES OF ALTERNATIVE MILKS (IE, ALMOND MILK, OAT MILK, RICE MILK, ETC)?

Posed to all respondents who use milk alternatives regularly or occasionally.

Price and availability.

I like several types so I like to alternate.

I like the variety.

I like to switch from time to time.

I like to try different nut milks.

I like to try different things.

I like to try different types.

I like to try everything at least once.

I like to try them all.

I usually buy what is on sale in the alternative milks and buy the one that is healthiest for my diabetes.

I usually switch between where I can get the best rebate.

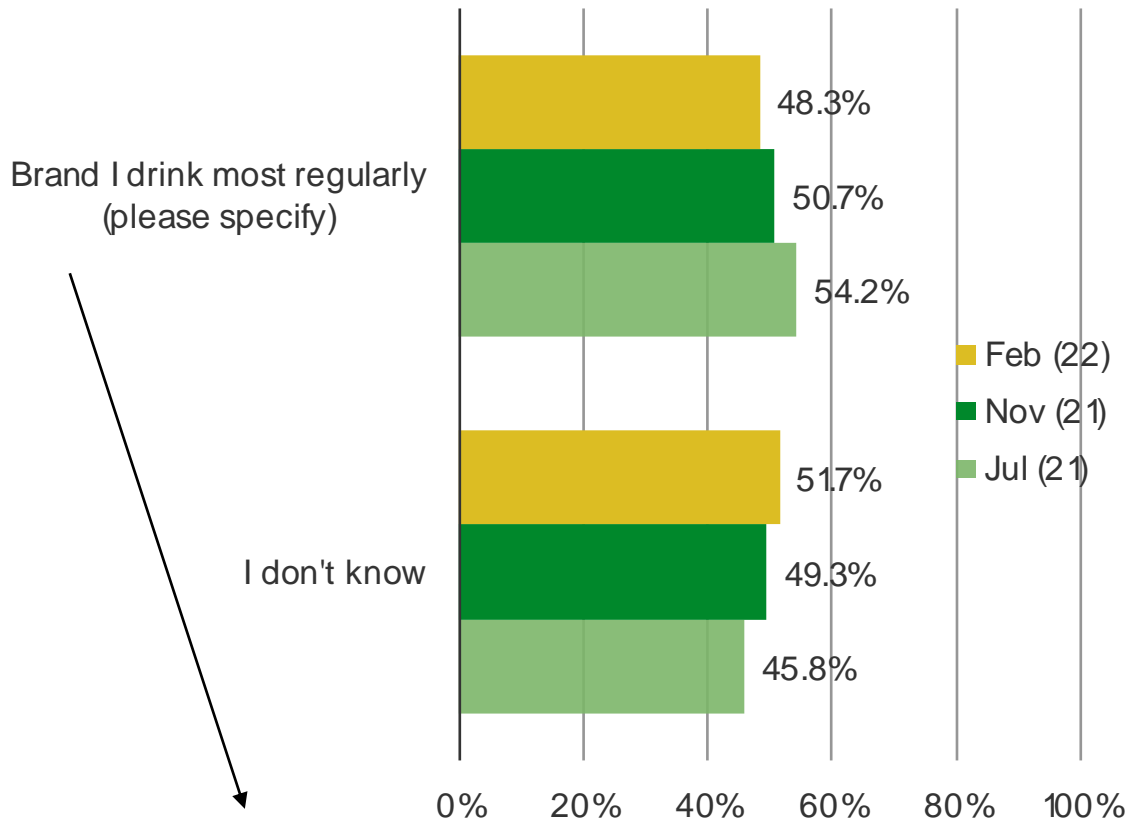
I want to get to know the best among the bests.

Variety.

OAT MILK

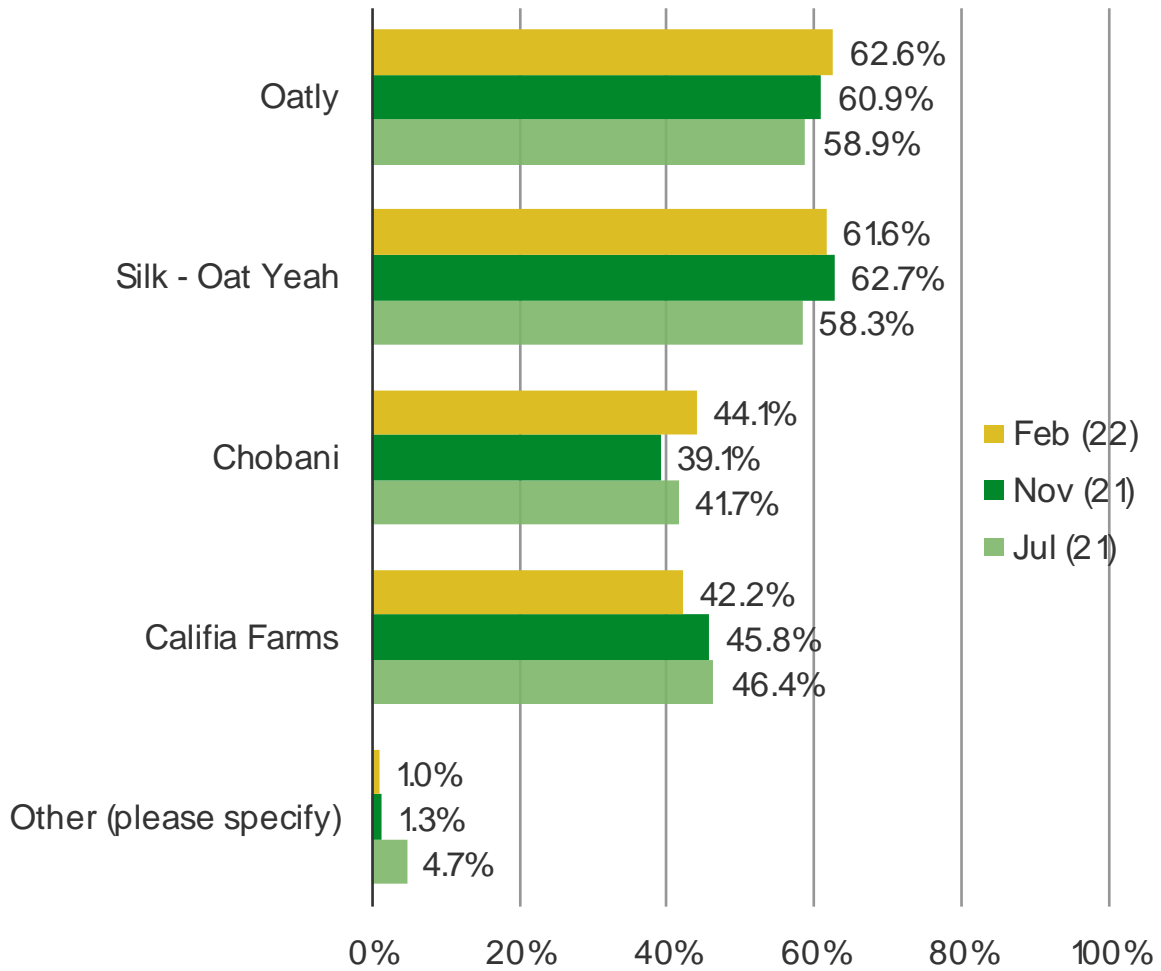
WHICH OAT MILK BRAND DO YOU CONSUME MOST REGULARLY?

Posed to all respondents who use oat milk alternatives regularly or occasionally.



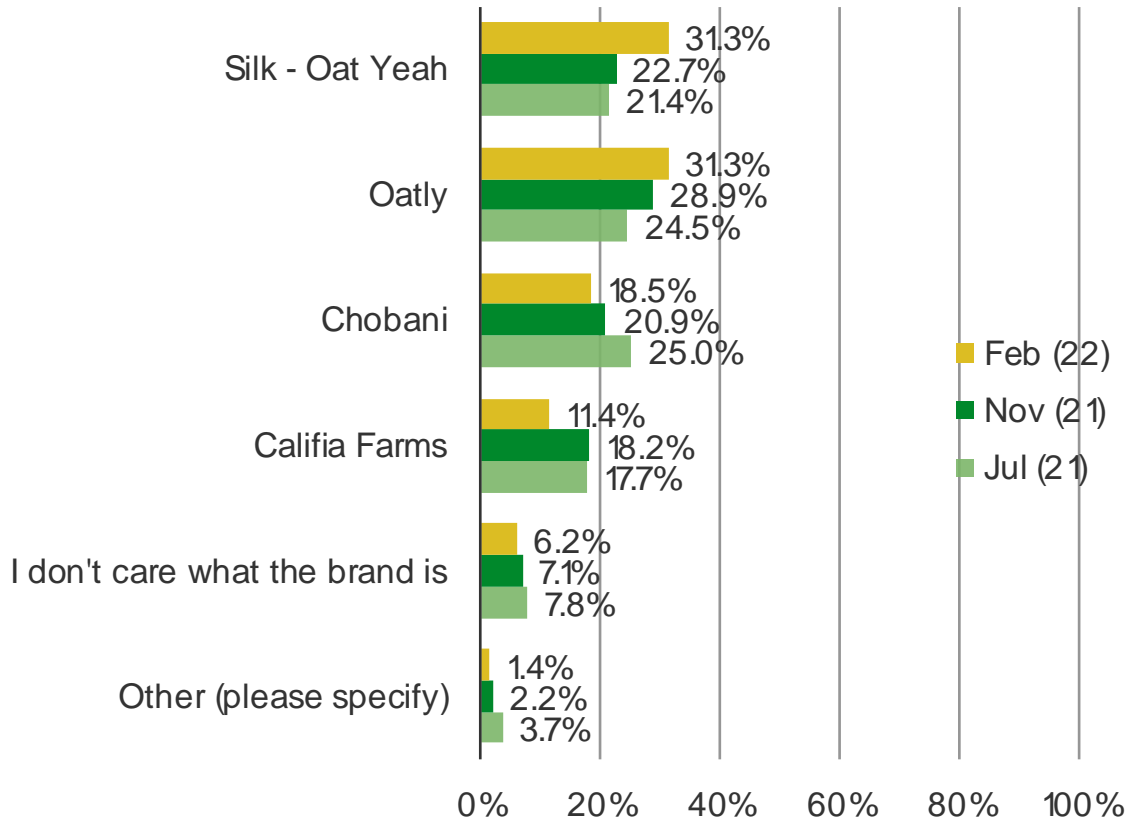
WHICH OF THE FOLLOWING OAT MILK BRANDS HAVE YOU EVER HAD? (SELECT ALL THAT APPLY)

Posed to all respondents who use milk alternatives regularly or occasionally and drink oat milk.



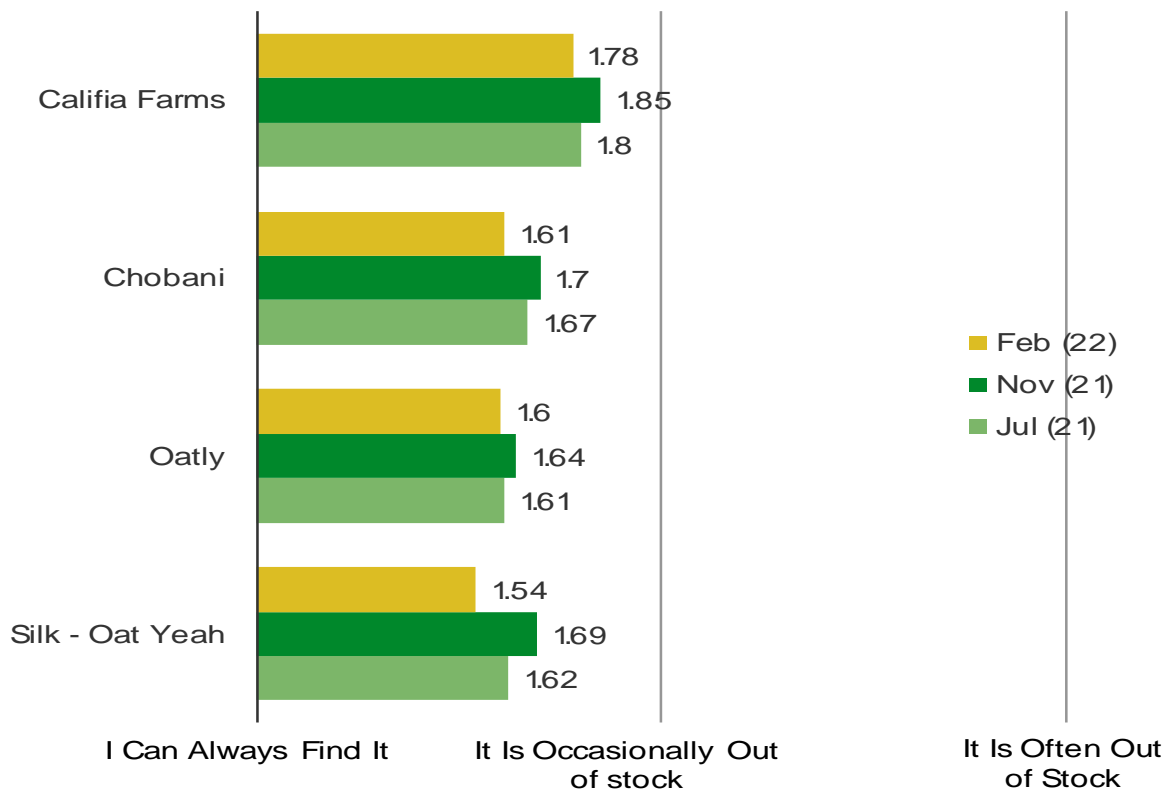
WHAT IS YOUR PREFERRED OAT MILK BRAND?

Posed to all respondents who use milk alternatives regularly or occasionally and drink oat milk.



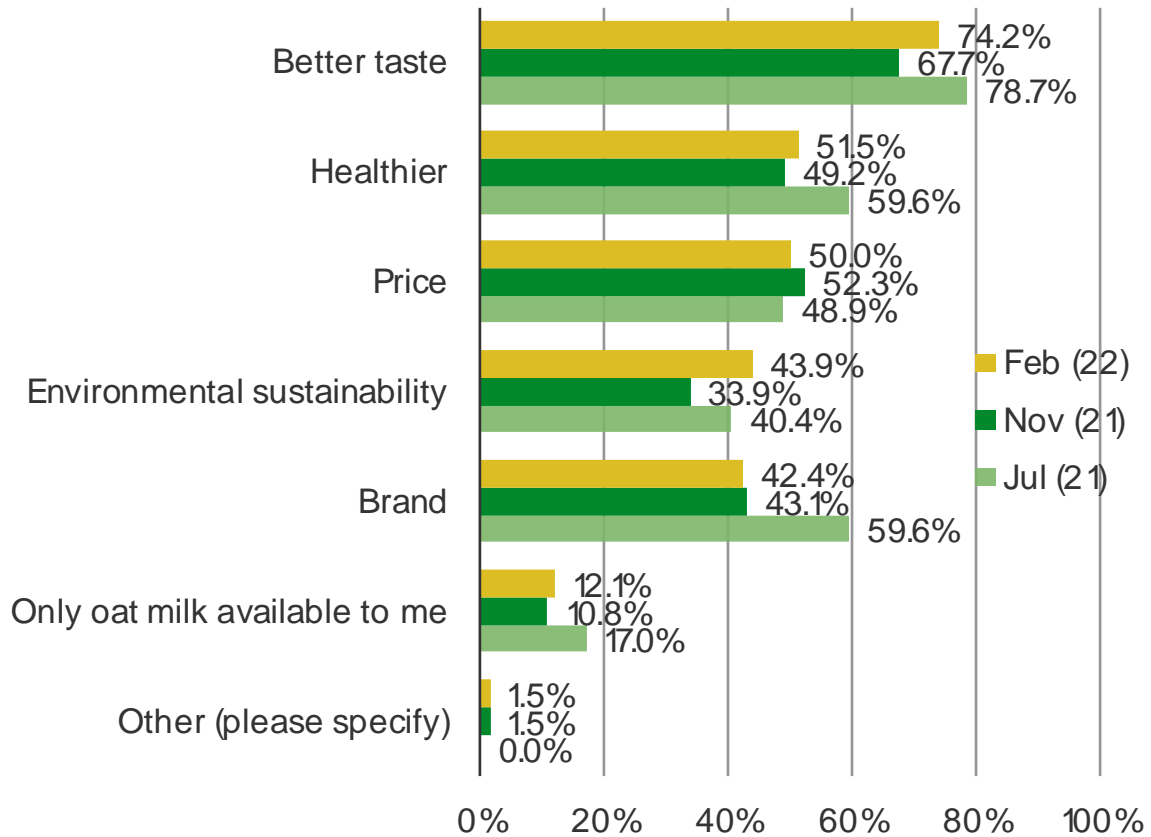
WHEN YOU PURCHASE OAT MILK IN GROCERY OR CONVENIENCE STORES, HOW EASY IS IT TO FIND THE FOLLOWING BRANDS?

Posed to all respondents who use milk alternatives regularly or occasionally and drink oat milk.



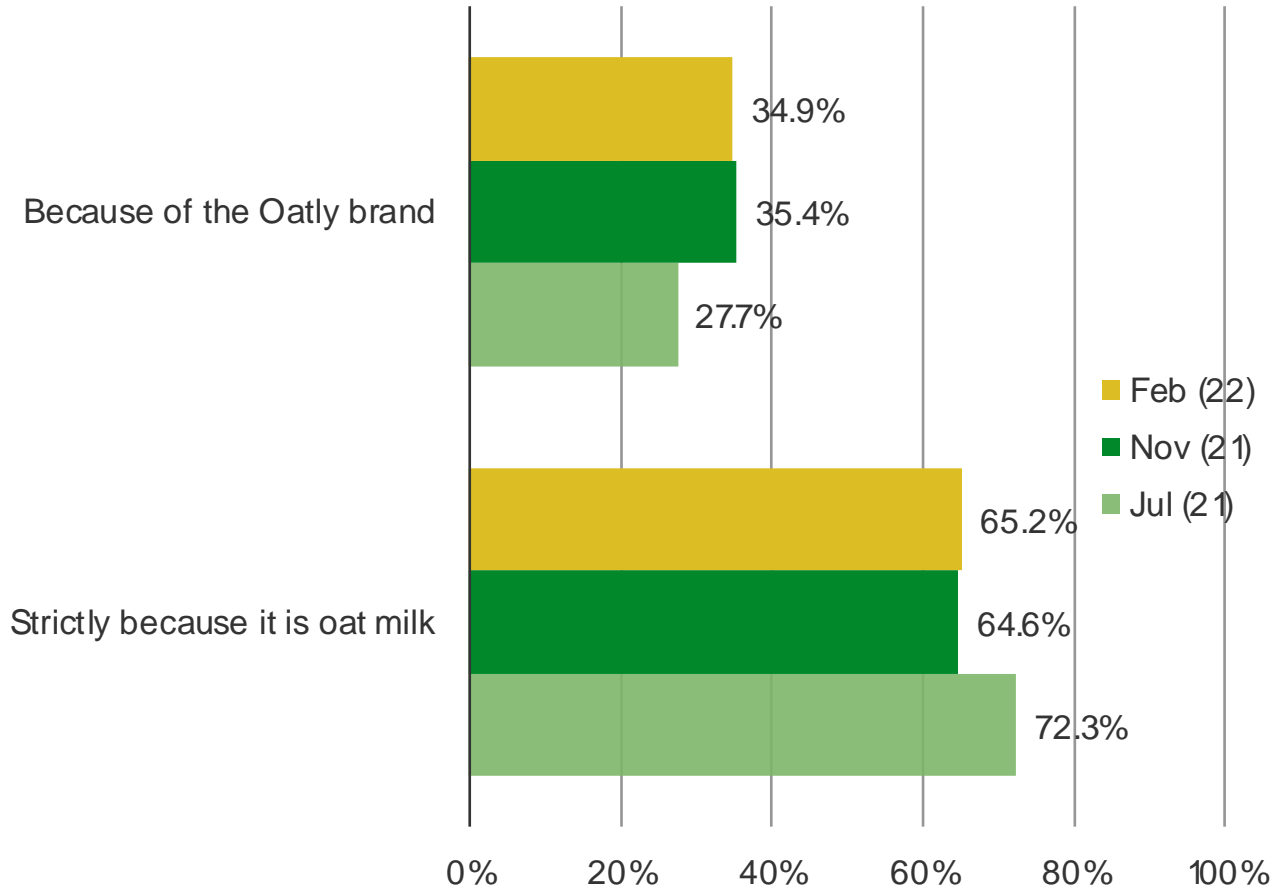
WHY DO YOU CHOOSE OATLY AS OPPOSED TO OTHER OAT MILK BRANDS? SELECT ALL THAT APPLY

Posed to oat milk drinkers whose brand preference is Oatly (N = 66)



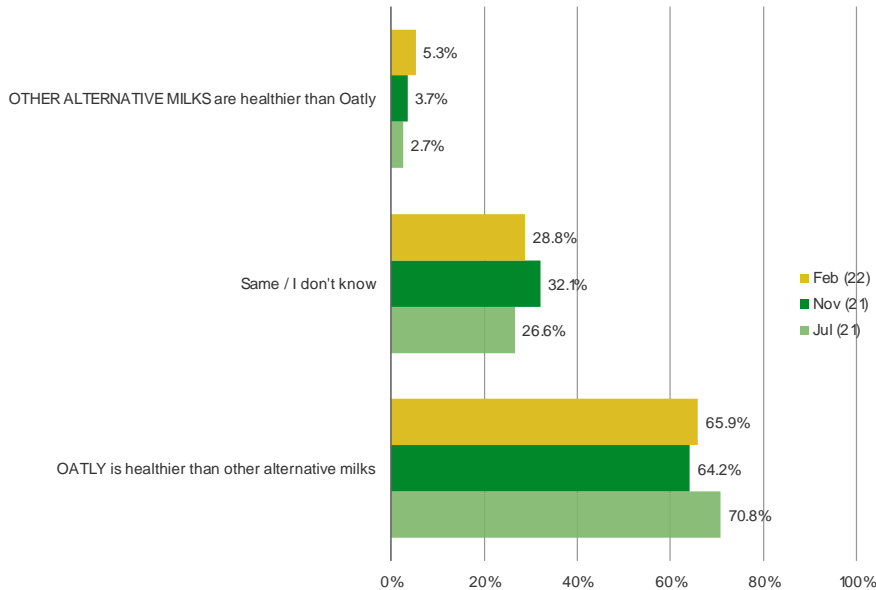
WHICH OF THE FOLLOWING BETTER DESCRIBES WHY YOU CHOOSE OATLY?

Posed to oat milk drinkers whose brand preference is Oatly (N = 132)



IN YOUR OPINION, HOW DOES OATLY COMPARE TO OTHER ALTERNATIVE MILKS WHEN IT COMES TO HOW HEALTHY IT IS?

Posed to oat milk drinkers whose brand preference is Oatly (N = 132)



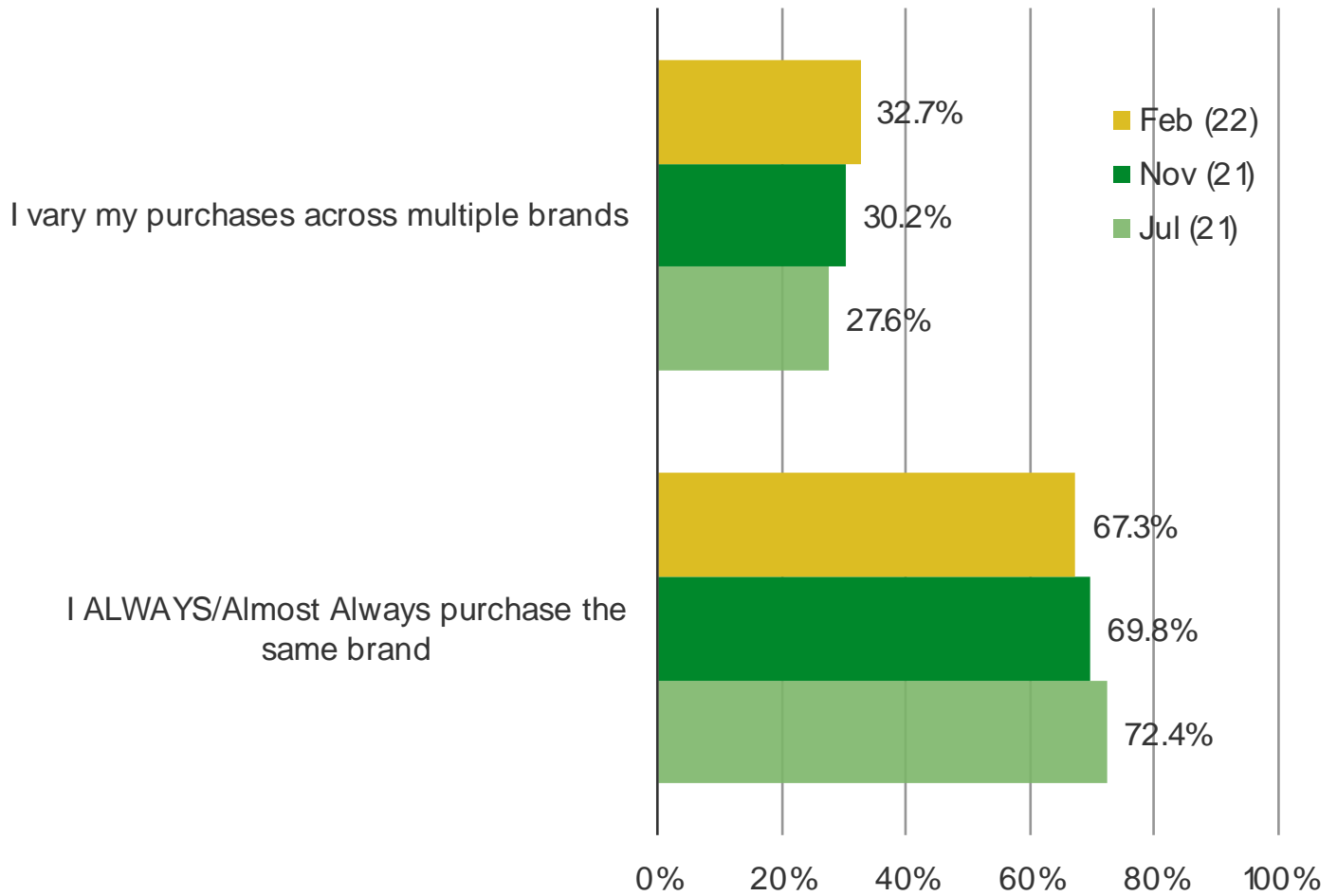
➔ Why do you feel that way?



- "Natural ingredients"
- "The ingredients"
- "Natural ingredients"
- "It taste good"
- "The solid taste and ingredients"
- "It is very good for the body"
- "it is made with better products"
- "it's made from oats"
- "Vitamins"
- "It has more calcium and vitamins."
- "Better for heart"
- "It's made of oat"
- "It has less calories"
- "Vitamins"
- "Feel better"
- "Its protein content"
- "Rich ingredients and sweet taste"
- "Low calories"
- "Healthy"
- "Cause it has health benefits"
- "It is very delicious"

THINKING ABOUT YOUR OAT MILK DRINKING, WHICH OF THE FOLLOWING BEST DESCRIBES YOU:

Posed to respondents who regularly or occasionally drink oat milk (N = 211).



WHAT IS THE MAIN REASON FOR WHY YOU VARY YOUR OAT MILK PURCHASES ACROSS MULTIPLE BRANDS AS OPPOSED TO CHOOSING THE SAME BRAND EVERY TIME?

Posed to respondents who regularly or occasionally drink oat milk and said they vary their purchases across multiple brands (N = 69).

