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Milk Advertising & Attitude Tracker

Gen Pop Moms and Kids Report - Quarter 1, 2020



Overall Perspective of Q1'20

1. The attitudes that drive milk consumption experience a small lift for Teens and Adult Exercisers in Q1'20

It has been more challenging to strengthen critical attitudes among Moms and Tweens.

2. Consistent across audiences, pleasure-related attitudes have improved versus last year

More Moms recognize milk as part of moments that matter while Tweens, Teens and Adult Exercisers are more likely to think of milk as a favorite. Select purpose attitudes improve: hydration (Teens/Tweens) and recovery and healthiness (Adult Exercisers).

3. Milk is considered a must-have beverage during the COVID-19 pandemic

Milk is perceived to be critical due to its broad/food uses, enjoyment and healthiness. Significantly fewer Moms deem milk alternatives to be must-haves during this crisis.

4. As a result of the COVID-19 pandemic, Moms say their milk consumption has increased

This self-reported increase in consumption is most likely linked to milk being in the fridge and being used in cereal as well as baking/cooking.

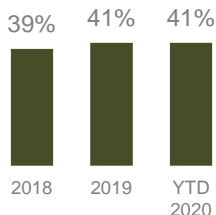
Snapshot of Attitudes that Drive Milk Consumption



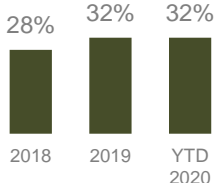
Agreement with the Milk Consumption Driver Indices

There have been some positive shifts in attitudes that drive milk consumption among Teens and Adult Exercisers over the past 1-2 years, though it has been more challenging to strengthen critical attitudes among priority targets – Moms and Tweens.

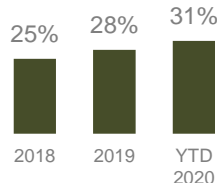
Gen Pop Moms
Overall Milk Consumption
Driver Index



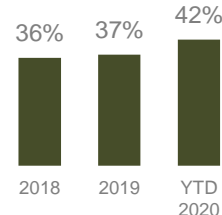
Tweens
Kids Consumption
Driver Index



Teens
Kids Consumption
Driver Index



Adult Exercisers
Chocolate Milk Consumption
Driver Index



**Shift YTD 2020
vs. 2019***

Positive Shifts

- Part of moments that matter
- Favorite drink
- Hydration
- Healthiness (Milk)
- Better than almond milk
- Favorite drink
- Disagree with sugar concerns
- Trusted beverage
- Hydration
- Recovery (Carb/protein ratio, Replenish nutrients, Backed by science)
- Healthiness (Milk, CM)
- Favorite drink
- Trusted beverage
- Enhances meals

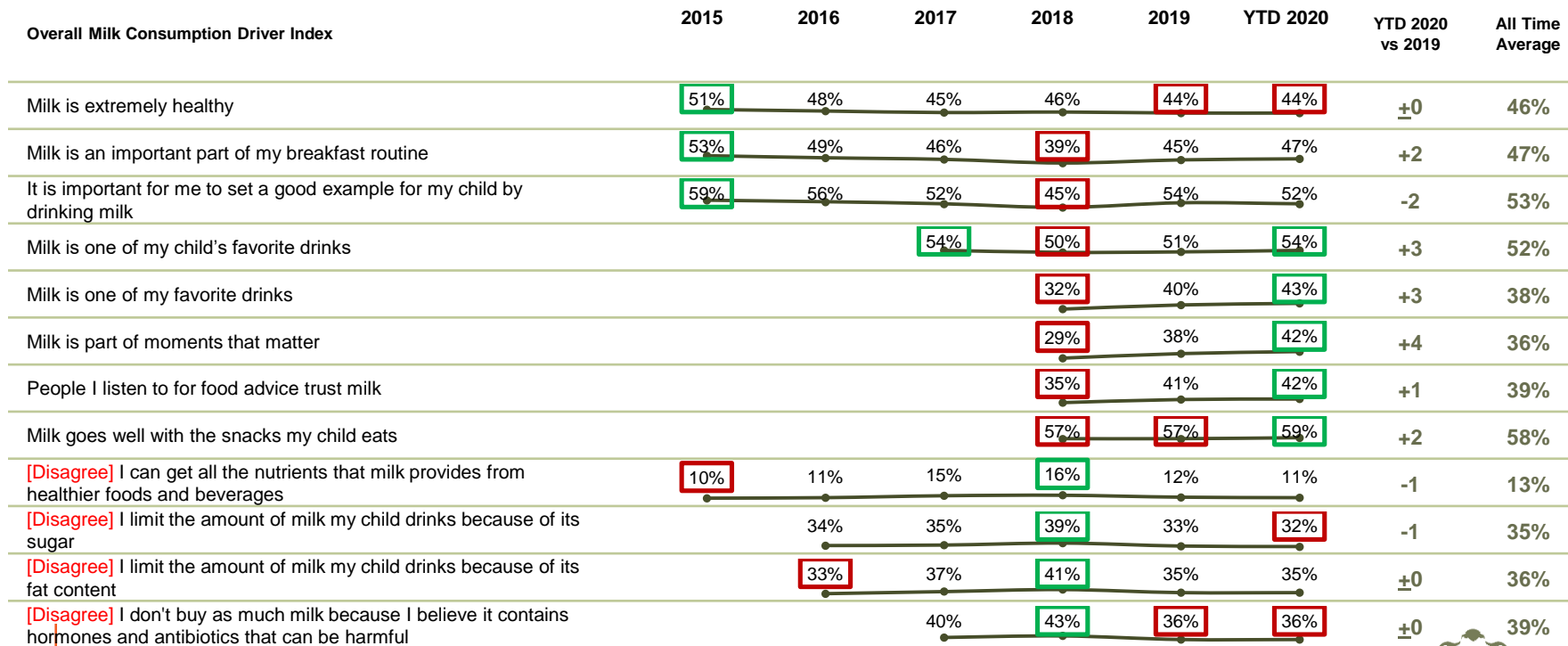
Agreement with Overall Milk Consumption Driver Index Over Time:

Individual Statements

Among Gen Pop Moms

Agreement with...

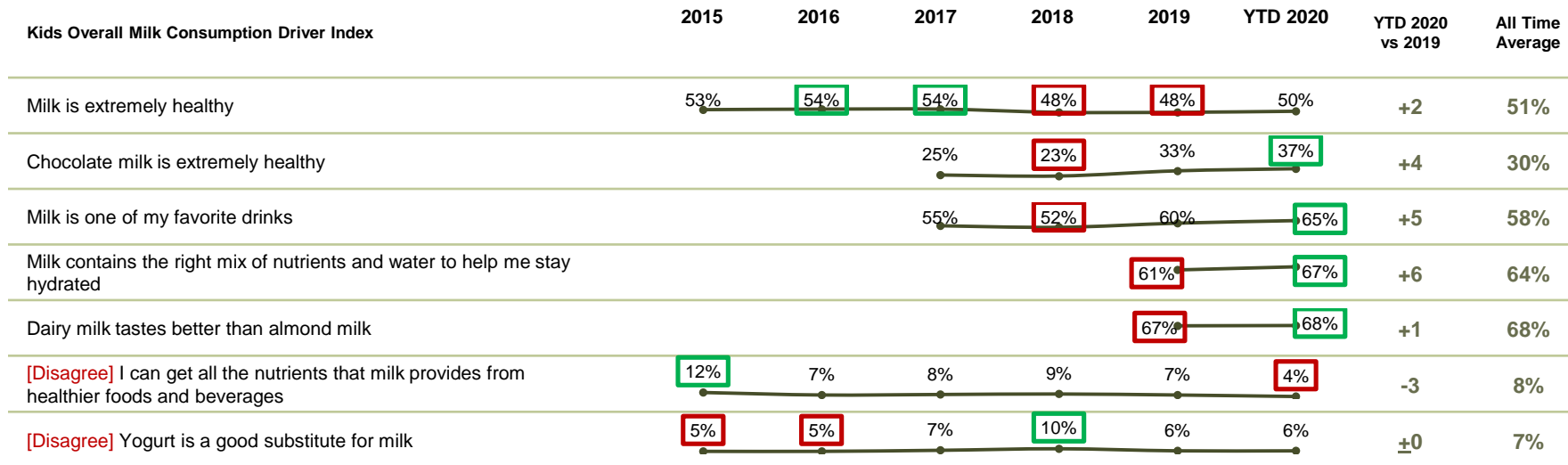
Trend (%) □ High □ Low



Agreement with Overall Milk Consumption Driver Index Over Time: Individual Statements Among Tweens

Agreement with...

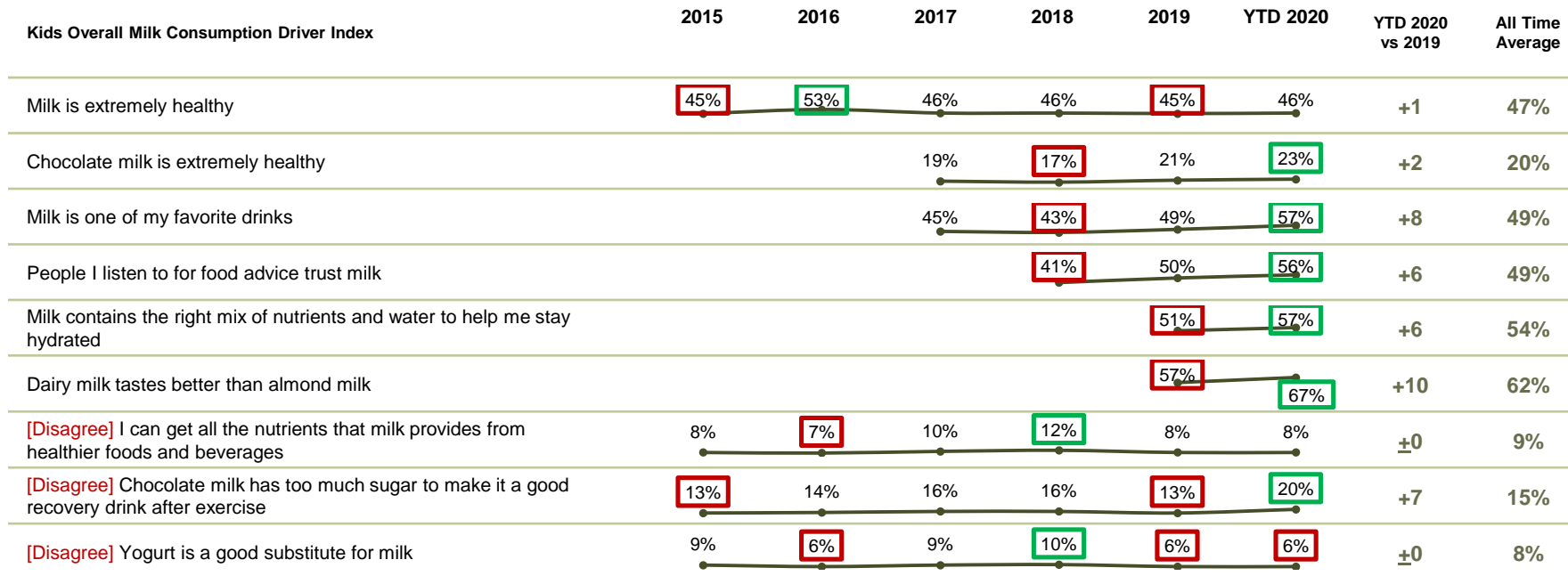
Trend (%) High Low



Agreement with Overall Milk Consumption Driver Index Over Time: Individual Statements Among Teens

Agreement with...

Trend (%) □ High □ Low

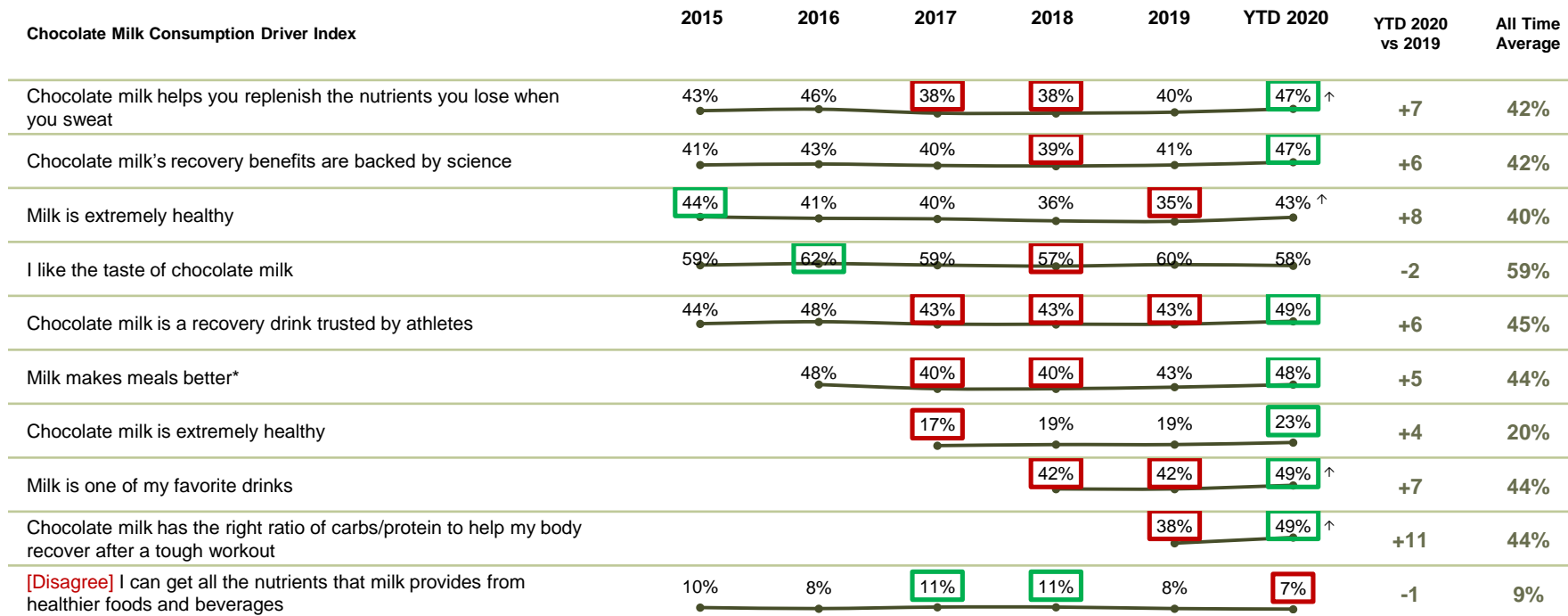


Agreement with Chocolate Milk Consumption Driver Index Over Time: Individual Statements

Among Adult Exercisers

Agreement with...

Trend (%) High Low



Impact of COVID-19 on Milk Perceptions and Behaviors

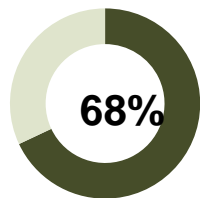


Perceptions of Milk During the COVID-19 Pandemic

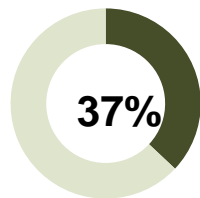
Among Gen Pop Moms

Milk continues to be perceived to be a must-have beverage during the pandemic. Milk's must-have status is primarily due to milk being used in other foods and beverages, its role as an enjoyable beverage for the family and its healthiness benefits.

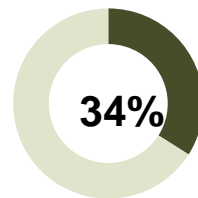
"Must Have" Items to Prepare for COVID-19



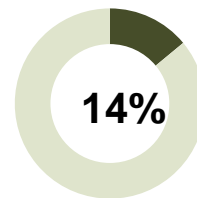
Milk



Packaged breakfast
(cereal, oatmeal, etc.)



Yogurt



Milk Alternatives
(almond milk, soy milk, oat milk)

Reasons Milk is Considered a "Must Have" During COVID-19



Milk/Food Relationship (34%): Using milk in a variety of ways (14%), Incorporating it into specific food applications such as cereal and coffee (14%)



Enjoyment (24%): Children/family drink milk and love it (22%)



Healthiness (23%): Has vitamins/nutritional value (8%), It's good for my family to drink milk (8%)

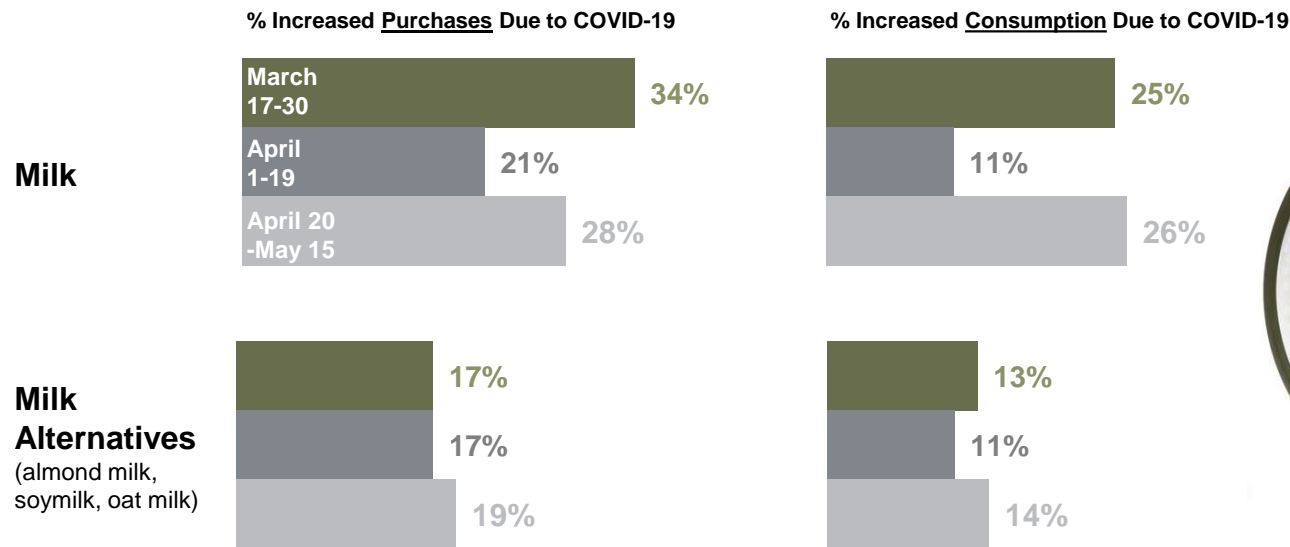
Those who feel milk is a "Must Have" during the pandemic vs. those who do not feel milk is a "Must Have"

- More likely to be **White** (69% vs 59%) and less likely to be African American (10% vs 20%)
- More likely to live in the **Northeast** (22% vs 13%)

Shifts in Behavior Due to the COVID-19 Pandemic

Among Gen Pop Moms

As the pandemic continues into May 2020, around a quarter of Moms say they are purchasing and consuming more milk as a result of the effects of COVID-19. Throughout the pandemic, more Moms have increased purchases and consumption of milk than milk alternatives.



Next Steps: Additional COVID-19 Research

We are conducting additional research in June regarding COVID-19's impact on food and beverage attitudes and behaviors, and more specifically, consumer engagement with milk. This is a two-part approach, involving qualitative and quantitative research.



Immersive Pop Up Community

How and why is engagement with milk and other foods and beverages shifting during COVID-19? How can we keep milk's momentum going post quarantine?

A 6-week pop up community among Moms and Dads to monitor the impact of the crisis on food and beverage routines and attitudes.



Consumption Tracker Mini Wave

How and to what degree are consumers' consumption behaviors shifting due to COVID-19?

Utilizing the Consumption Tracker, we will do an additional dip-in in early June to better understand how milk consumption is impacted as the pandemic continues.

A close-up photograph of a smiling woman with dark skin and short hair, holding a glass of milk. She is looking directly at the camera with a warm expression. The background is softly blurred, showing what appears to be an indoor setting with light-colored walls.

Moms' Engagement with Milk

Quarter 1, 2020

Things to know about Gen Pop Moms in Q1'20

1. Moms' healthiness perceptions of milk hold steady, above competitors

The proportion of Gen Pop Moms who rate milk extremely healthy remains higher than competitors, consistent with levels seen over the past three years.

2. Moms' encouragement to consume milk remains stable, but below peak 2018 levels

The proportion of Moms who encourage their child to consume milk 3+ times per day remains at 1 in 4, on par with last year.

3. Despite increased spend versus last quarter, overall advertising awareness remains unchanged

While total MilkPEP advertising awareness remains on par with last year's levels, Love What's Real awareness has declined in 2020.

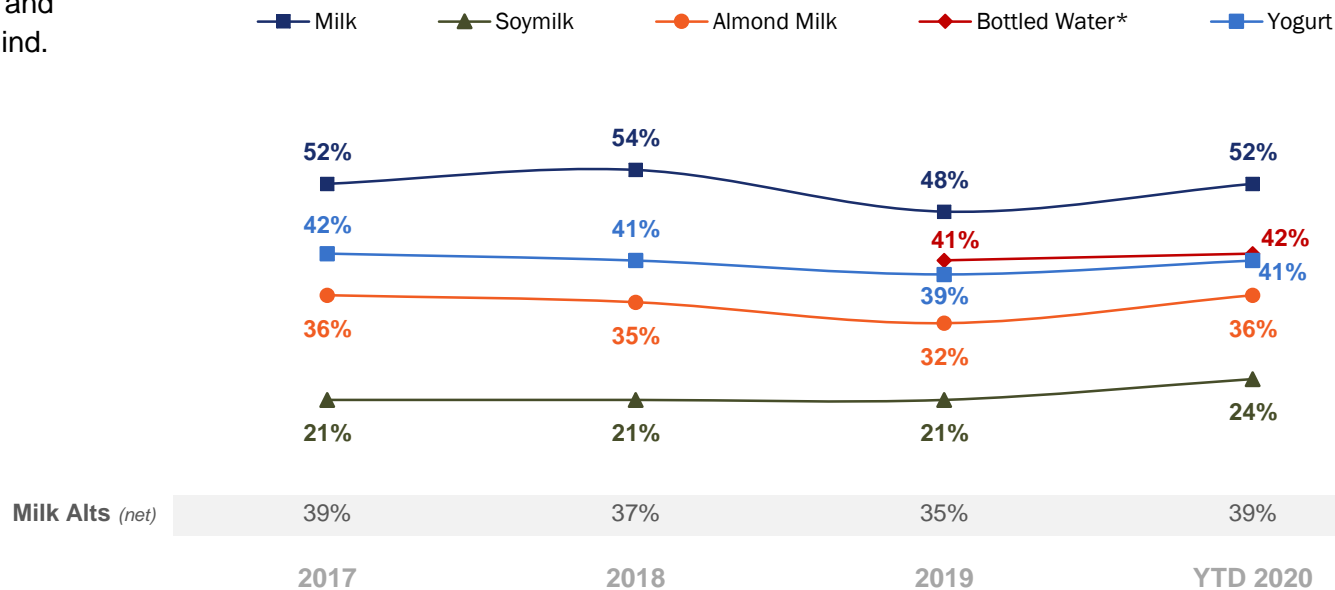
4. Awareness of the Pour More Milk campaign maintains its Q4'19 boost

The success of Pour More Milk combined with a bump in BWCM awareness has offset softened awareness of the Love What's Real campaign this quarter.

Milk Communications Compared to Competitive Foods and Beverages Among Gen Pop Moms

Milk continues to be the beverage that Moms are hearing the most about in 2020, followed by bottled water and yogurt. Soymilk trails behind.

% Saw, Read or Heard Something about Food/Beverage in Past Six Months

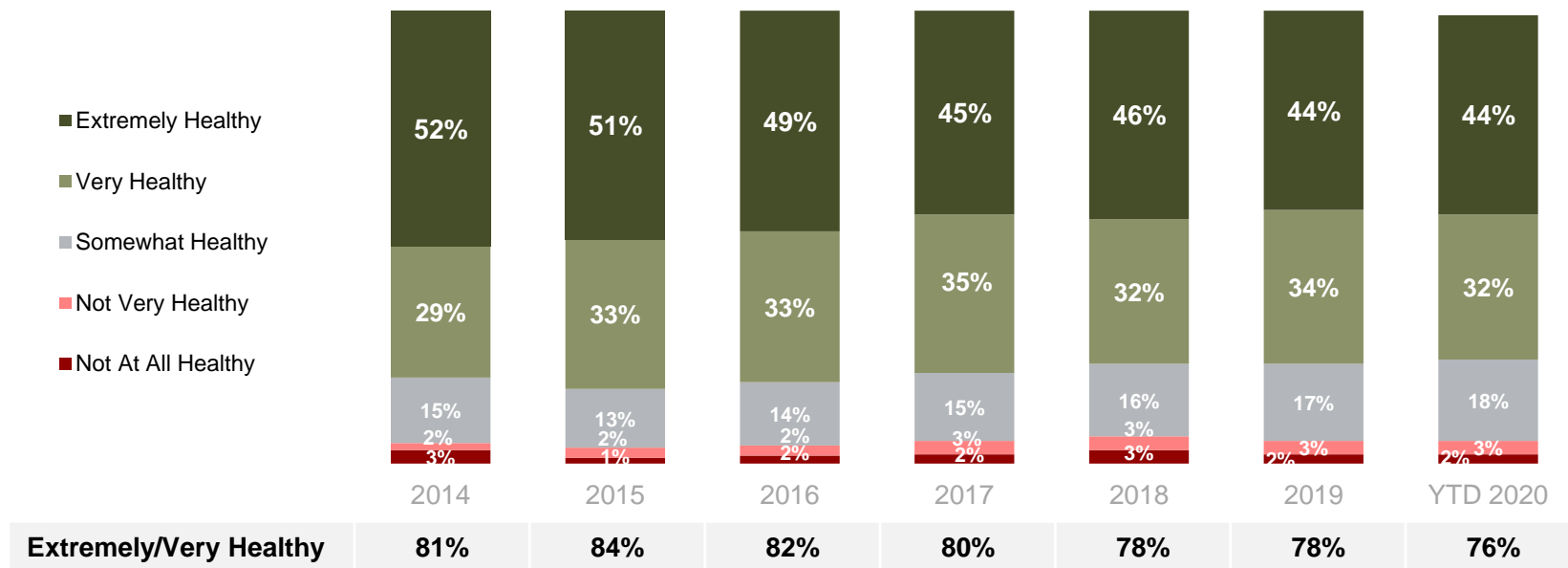


A Closer Look at Moms' Perceived Healthiness of Milk

Among Gen Pop Moms

In 2020, Moms' healthiness perceptions of milk remain on par with 2019 levels; healthiness perceptions of milk continue to be at their lowest levels to date.

Milk's Perceived Healthiness



Exploring Shifts in Milk's Healthiness Perceptions Among Gen Pop Moms

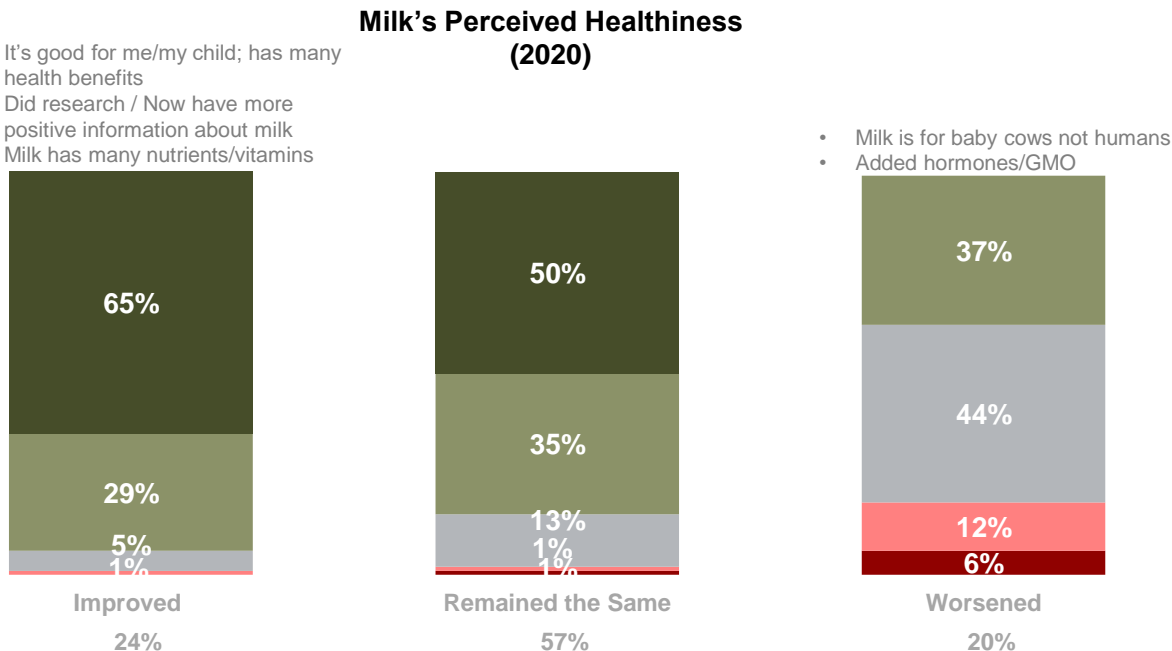
Moms' attribute improved perceptions in milk's healthiness to learning about milk's functional benefits. For those with worsened perceptions of milk's healthiness, most still see milk as very or somewhat healthy, just not extremely healthy.

Frequently Mentioned Reasons for Perception Shift

- It's good for me/my child; has many health benefits
- Did research / Now have more positive information about milk
- Milk has many nutrients/vitamins

- Extremely Healthy
- Very Healthy
- Somewhat Healthy
- Not Very Healthy
- Not At All Healthy

Shift in Milk's Healthiness Perceptions Over the Past Three Years

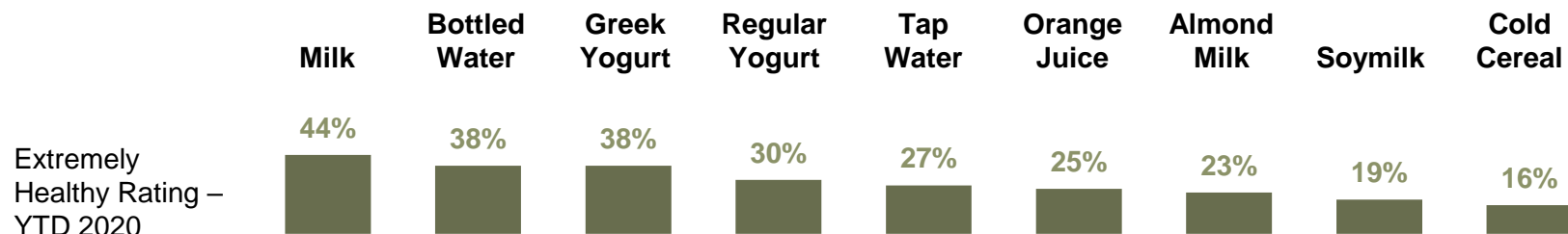


Note: Before Q2'15, question asked only in Q1 and Q3. For competitors, net top 2 box shown. | Q.18a Using the scale below, please indicate how healthy you think each of these food or beverage items are for you/your child(ren). | Q.18b You mentioned that you currently think milk is [INSERT HEALTHINESS RESPONSE] for [your child(ren)]. We'd like to understand more about your perceptions of milk over time. If you answered this question three years ago, which would best describe your perceptions of milk at that time? | Q.18c Three years ago you thought milk was [INSERT HEALTHINESS RESPONSE] and how you think milk is [INSERT HEALTHINESS RESPONSE]. Why have your perceptions of milk's healthiness changed?

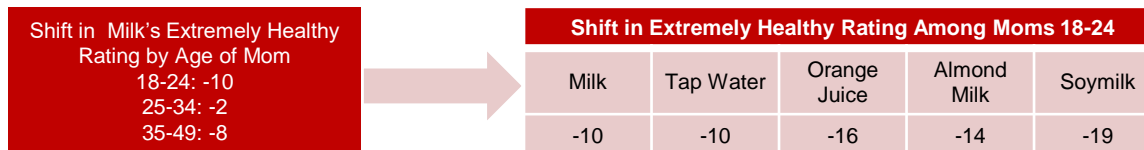
“Extremely Healthy” Food and Beverage Trends

Among Gen Pop Moms

Even with declines in healthiness perceptions, milk remains the leader of extremely healthy foods/beverages among Moms. While it has been most challenging to maintain milk’s healthiness perceptions among young Moms ages 18-24, they also express weaker healthiness perceptions for a variety of competitive beverages, especially milk alternatives.



Shift in Extremely Healthy Rating (YTD 2020 vs. 2015)



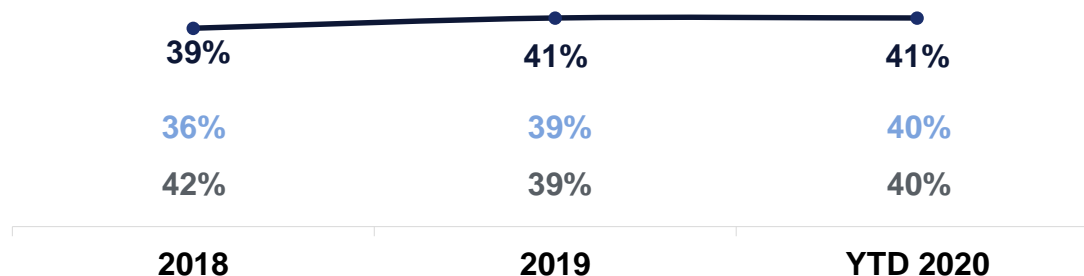
Agreement with Milk Consumption Driver Index

Among Gen Pop Moms

Gen Pop Moms' agreement with the attitudes that drive milk consumption is on par with 2019 levels, both for attitudes specific to Mom herself as well as her child's consumption.

Agreement: Milk Consumption Driver Index

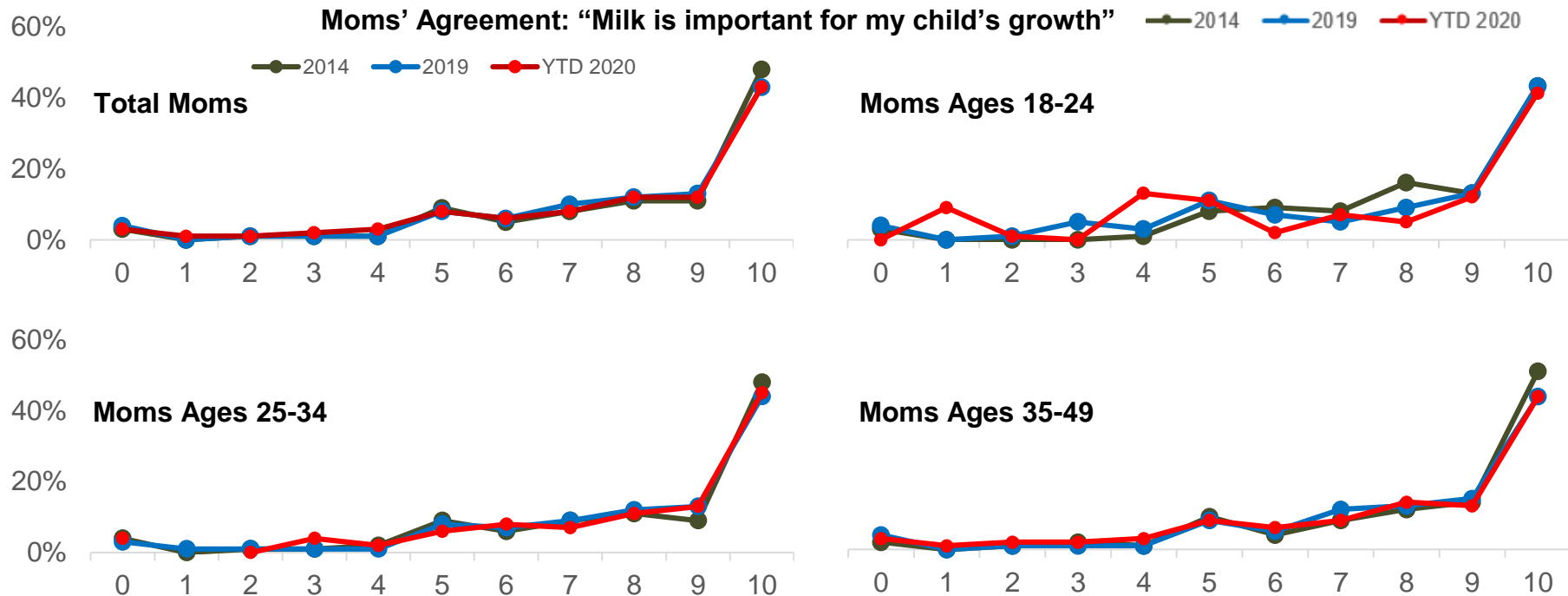
 Index for **Moms' Consumption**
 Index for **Child's Consumption**



A Closer Look at Milk Attitudes by Age of Mom

Among Gen Pop Moms

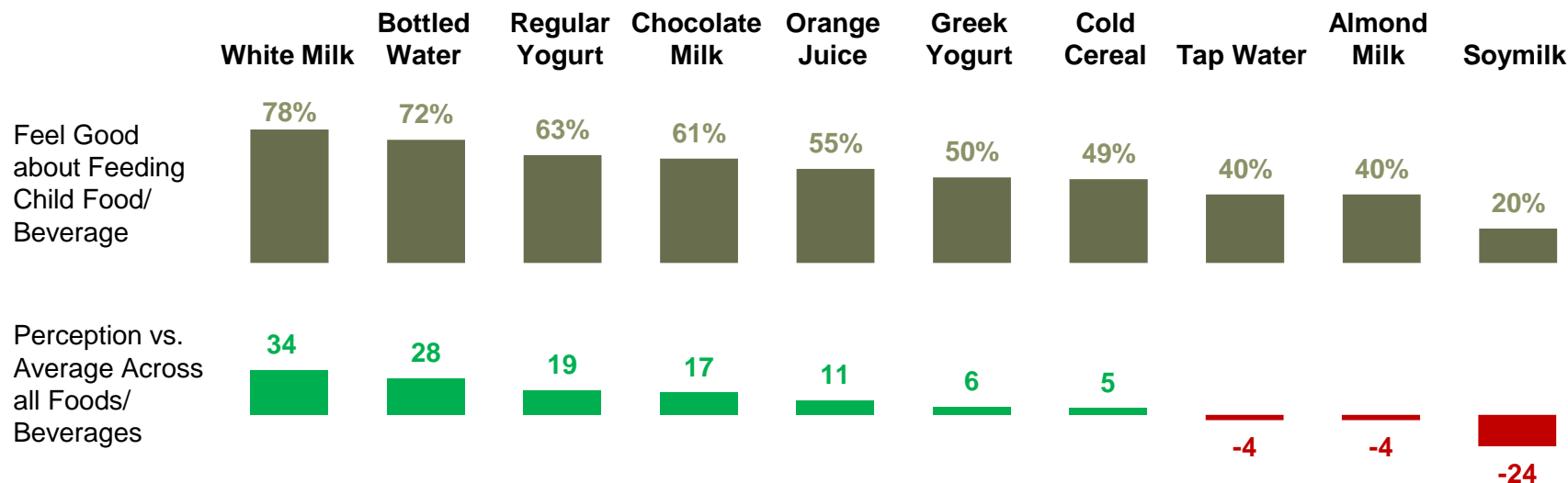
2020 agreement with “Milk is important for my child’s growth” is on par 2019 levels across the board, slightly below peak agreement with the attitude in 2014.



Perceptions When Serving Foods/Beverages to Child

Among Gen Pop Moms

The products Moms feel best about serving their children continue to be white milk and bottled water in 2020. Most Moms don't feel good about serving their children milk alternatives, especially soymilk.

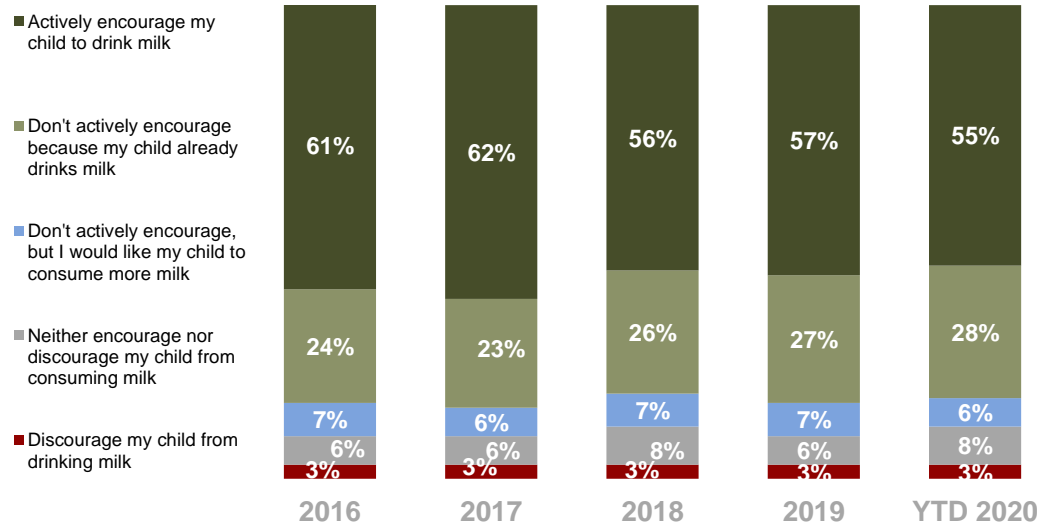


Moms' Role as Advocate for Child

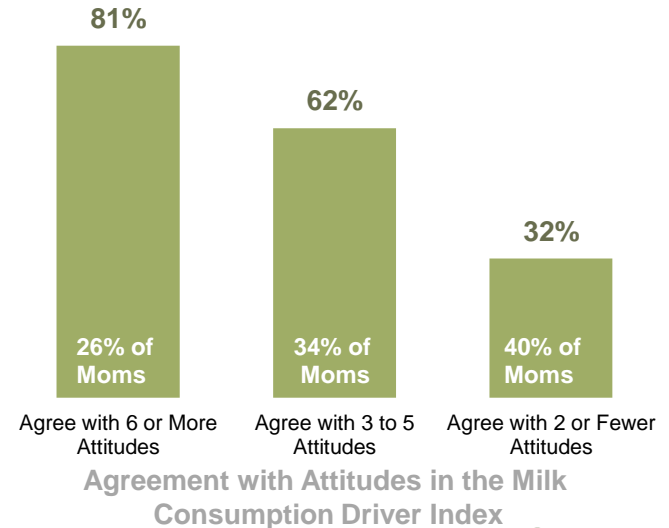
Among Gen Pop Moms

So far in 2020, encouragement remains on par with 2019 levels with more than half of Moms actively encouraging their children to drink milk. Agreement with more attitudes in the consumption driver index translates to higher likelihood of encouragement.

**Milk Encouragement Spectrum
Among Gen Pop Moms**



**% Gen Pop Moms Actively Encouraging
Children to Consume Milk (YTD 2020)**



Impact of Mom's Behavior on Child's Consumption

Among Gen Pop Moms

The power of Mom role modeling milk consumption and encouraging her child to consume milk is evident; these children are more likely to drink milk daily and consume greater amounts of milk. On its own, Mom personally consuming milk is more impactful than solely encouraging her child to drink it, likely because milk is readily available in the fridge.

	Total Moms	Mom Encourages; Mom Drinks Milk	Mom Encourages; Mom Does Not Drink Milk	Mom Does Not Encourage; Mom Drinks Milk	Mom Does Not Encourage; Mom Does Not Drink Milk
Consumption Indexed vs. Total Children's Consumption					
Children's Past Day Milk Penetration	76%	110	93	100	58
Children's Past Day Milk Volume (oz per day)	10.2	130	70	83	36

Top Opportunities to Increase Encouragement and Personal Consumption Among Gen Pop Moms

Opportunities to increase encouragement and personal consumption are fragmented, encompassing a mix of pleasure and purpose driven aspects of milk consumption.

Top Factors Impacting Moms' Encouragement Decisions*

We can boost encouragement if we can...

- Change the belief that my child already drinks enough milk **22%**
- Reinforce that milk helps my child grow **21%**
- Alleviate hormones / antibiotics concerns **19%**
- Emphasize that my child loves the taste **19%**



Top Opportunities to Encourage More Personal Milk Consumption^

I would drink more milk if...

- 18%** Milk tasted better
- 16%** I thought milk were healthier
- 14%** Milk did not upset my stomach
- 30%** Nothing could make me drink more

Top Barriers to Milk Consumption

Among Gen Pop Moms

When thinking about what's stopping Moms from drinking more milk, which we know makes them more likely to encourage their children to drink, stomach discomfort and the perceived calories are barriers for both white and chocolate milk. Sugar is the main barrier for chocolate milk consumption.

Top Barriers For GP Moms Drinking White Milk^

I don't drink more white milk because...

Milk upsets my stomach **15%**

I don't like the taste of white milk **15%**

I'm watching my weight **11%**



Top Barriers For GP Moms Drinking Chocolate Milk^

I don't drink more chocolate milk because...

17% It's high in added sugar

12% I'm watching my weight

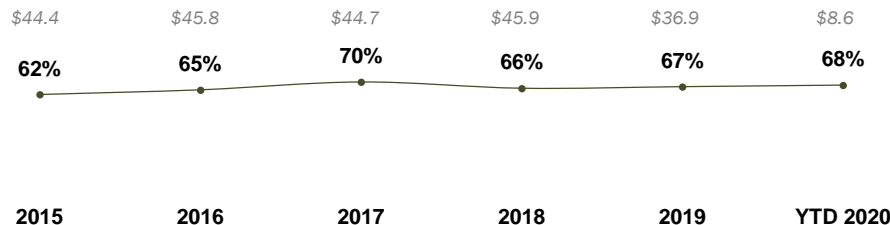
11% It upsets my stomach

Overview of Total MilkPEP Advertising Awareness

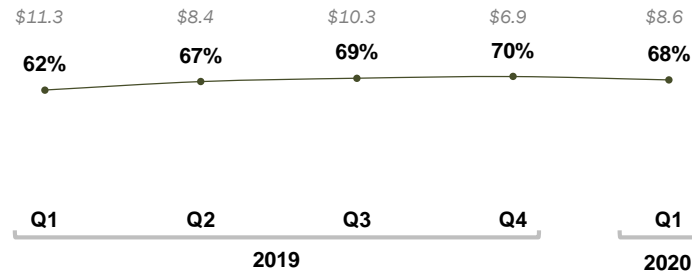
Among Gen Pop Moms

Increased spend in Q1 doesn't translate to increased awareness of MilkPEP advertising - which remains on par with Q4'19 awareness at the start of 2020. Among Moms of Tweens, MilkPEP advertising awareness sees a significant decline.

Total MilkPEP Advertising Awareness Year / Year



Quarter / Quarter



Among Moms of...	2015	2016	2017	2018	Q1'19	Q2'19	Q3'19	Q4'19	Q1'20
2-8 year olds	63%	65%	76%	72%	64%	74%	69%	72%	72%
9-12 year olds	64%	71%	68%	64%	66%	63%	73%	75%	68% ↓
13-17 year olds	61%	59%	62%	60%	56%	61%	66%	62%	62%

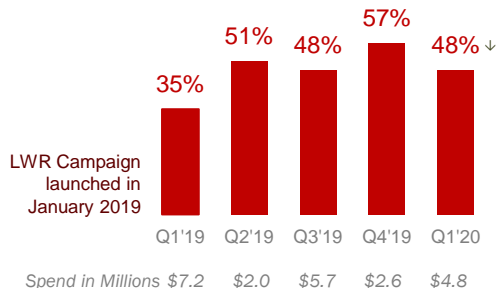
MilkPEP Advertising Awareness

Among Gen Pop Moms

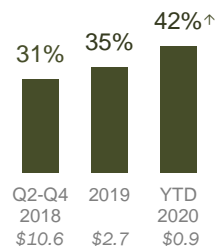
Awareness of the Pour More Milk and Built with Chocolate Milk campaigns are trending in the right direction in Q1'20, with Pour More Milk maintaining last quarter's high awareness levels. Awareness of the Kids Campaign is stable, while awareness of Love What's Real has softened in the first quarter of 2020.

Campaign Awareness

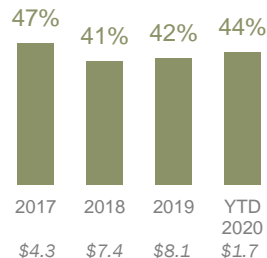
Love What's Real



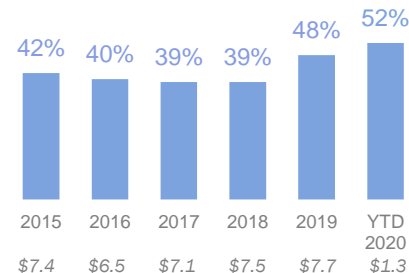
Pour More Milk



Kids Campaign



BWCM

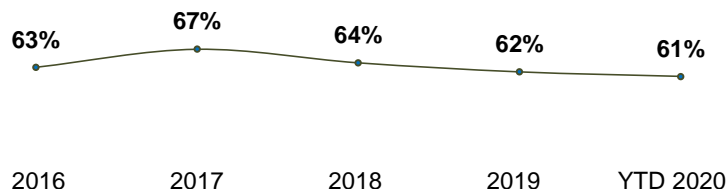


Overview of White Milk Campaigns

Among Gen Pop Moms Aware of White Milk Advertising

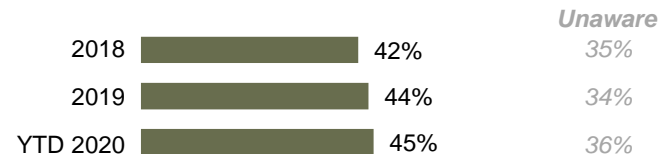
Although awareness of the Love What's Real campaign softens this quarter, recall of its message – milk creates moments that matter – continues to build among those aware of White Milk advertising.

% Aware of White Milk Advertising



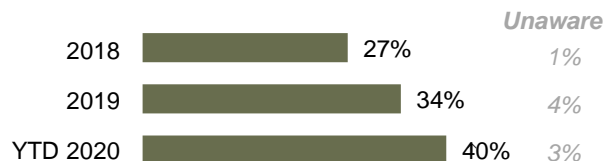
% Agree with New Overall Consumption Driver Index Attitudes Among Moms Aware of White Milk Advertising

(displaying average agreement across statements)

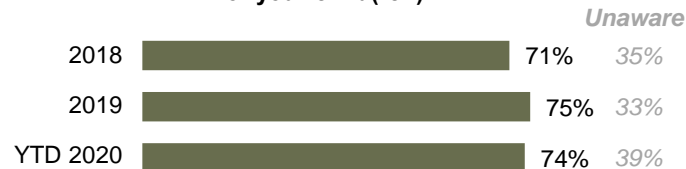


% Recall Campaign Messages Among Moms Aware of White Milk Advertising

“Milk brings people together, creating moments that matter”



“Milk providing balanced nutrition for your child(ren)”

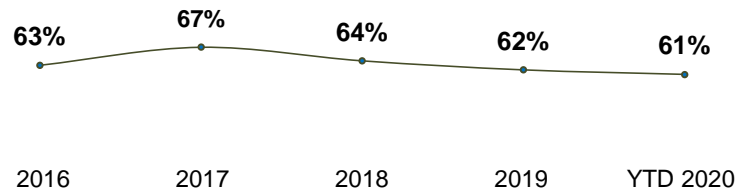


Overview of White Milk Campaigns

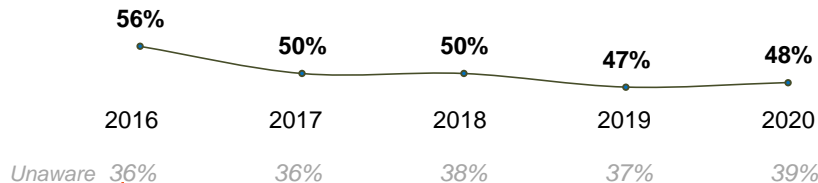
Among Gen Pop Moms Aware of White Milk Advertising

Moms aware of White Milk advertising continue to have higher healthiness perceptions and consumption of the beverage and are more likely to encourage their children to drink it than those unaware. Yet, moms aware express very little movement across these measures vs 2019.

% Aware of White Milk Advertising



% Rate Milk Extremely Healthy
Among Moms Aware of White Milk Advertising

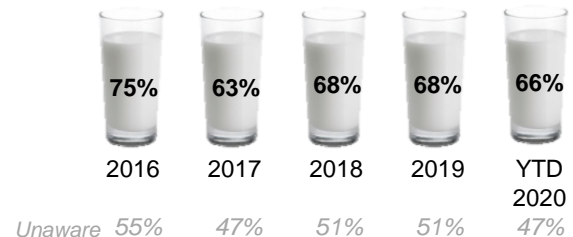


Unaware 36% 36% 38% 37% 39%

% Actively Encourage Child to Consume Milk
Among Moms Aware of White Milk Advertising



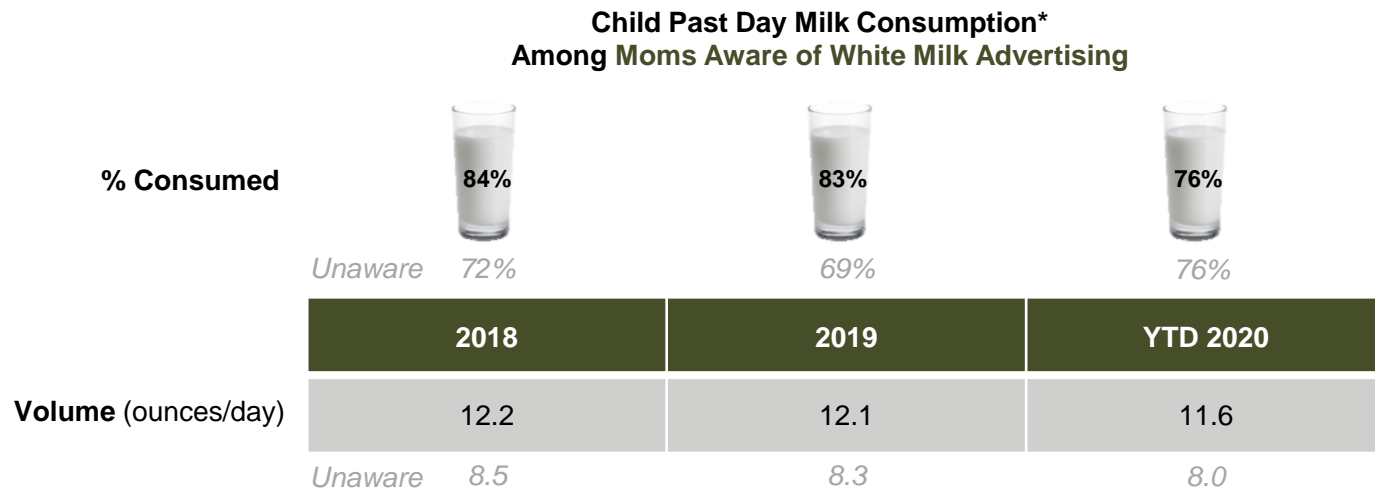
% Moms Consumed Milk in Past Day
Among Moms Aware of White Milk Advertising



Overview of White Milk Campaigns

Among Gen Pop Moms Aware of White Milk Advertising

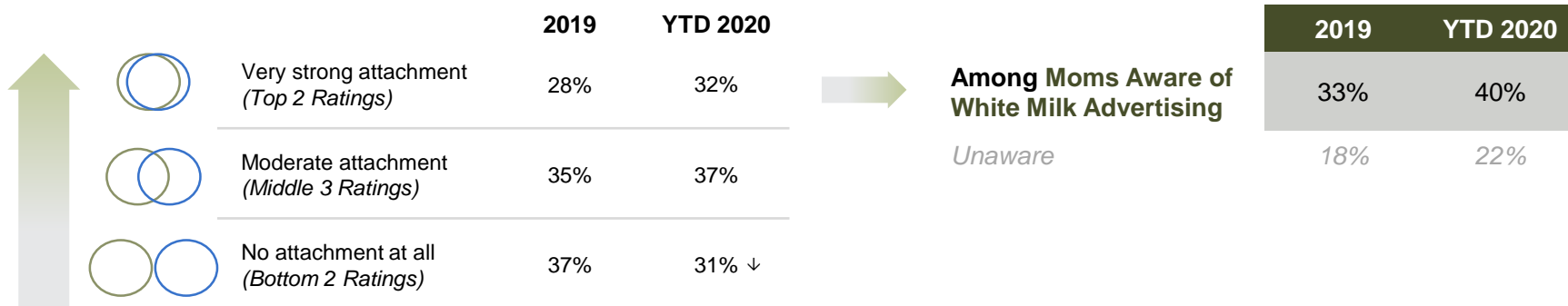
Moms' exposure to White Milk advertising has not yielded more children who drink milk daily or had a significant impact on improving the amount of milk children consume per day.



Moms' Attachment to Milk

Among Gen Pop Moms

Moms' attachment to milk is stronger this year compared to 2019, especially among those aware of White Milk advertising. While Moms feel more connected to milk than milk alternatives, both beverages trail cheese, a dairy staple.



Why do Moms feel neutral about milk?

Among those who feel neutral about emotional attitudes...

Milk is **just there and always has been** so it doesn't evoke any strong emotions for me

35%

I'm more focused on what **milk does for my body** rather than how it makes me feel

23%

How does milk's very strong attachment compare to competitors?



Cheese^:
58%



Milk:
32%



Almond Milk^:
20%

↑ ↓ - Significantly higher/lower than the previous year at the 95% confidence level.
Q80. Below are images that could represent your relationship with milk, from no attachment at all to a strong attachment. Please select the image that best describes your current relationship with milk. Q80a. Below are images that could represent your relationship with almond milk, from no attachment at all to a strong attachment. Please select the image that best describes your current relationship with milk. Q80b. Below are images that could represent your relationship with cheese, from no attachment at all to a strong attachment. Please select the image | Q.23m Why did you choose a neutral rating for the statements below as a whole?
Emotional Attitudes: Milk is a comforting beverage, Milk is one of my favorite drinks, Milk is a part of moments that matter, I feel good when my child has white milk. | *Question added in Q1'19. ^Question added in Q4'19

A photograph of a young girl and a woman, likely her mother, sitting on a bed. The girl is in the foreground, holding a glass of milk and looking towards the camera. The woman is behind her, also holding a glass of milk and smiling. They are both wearing white clothing. The background is a simple, light-colored wall.

Tweens' and Teens' Engagement with Milk

Quarter 1, 2020

Things to know about Tweens and Teens in Q1'20

1. Perceptions of milk being an extremely healthy beverage remain on par with the last two years

While half of Teens and Tweens rate milk as being an extremely healthy beverage, this proportion remains below peak 2016 levels.

2. Among Tweens, awareness of MilkPEP advertising strengthens, returning to 2017 levels

Teen awareness of MilkPEP advertising remains on par with 2019.

3. Milk It! awareness continues to build among both Tweens and Teens

Among Tweens, awareness of Pour More Milk and Built With Chocolate Milk also increases significantly in Q1'20.

4. Milk consumption remains steady among both Tweens and Teens, below peak 2016 levels

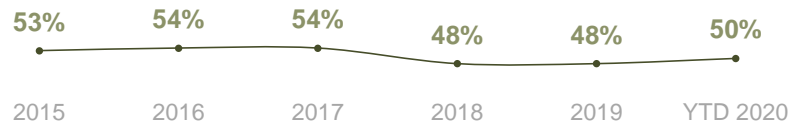
For both total milk and chocolate milk, consumption remain on par with what's been observed throughout 2017-2019.

Snapshot of Tween Engagement with Milk

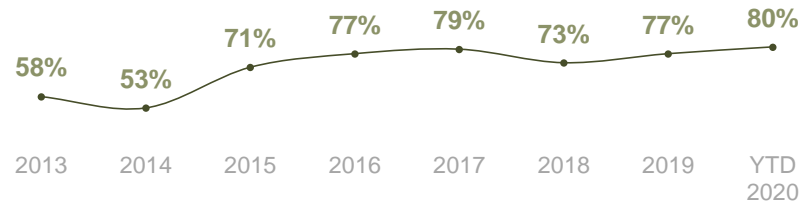
Among Total Tweens

Extreme healthiness perceptions, awareness of MilkPEP advertising, and milk consumption all remain stable at the start of 2020.

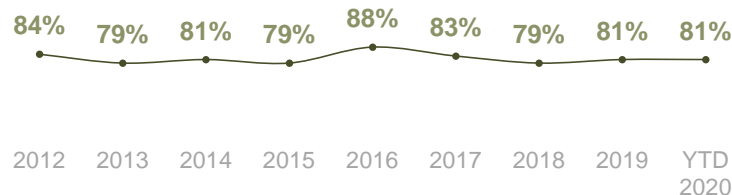
% Rate Milk Extremely Healthy*



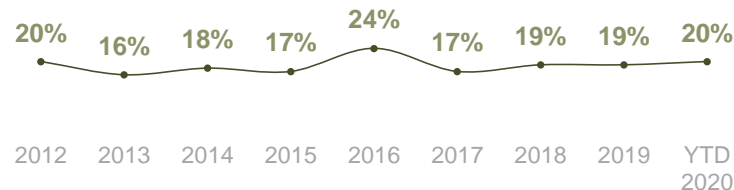
% Aware of MilkPEP Advertising



% Consumed Milk in Past Day



% Consumed **Chocolate** Milk in Past Day



Top Barriers to Milk Consumption

Among Parents of Tweens answering about their Tweens

The top barriers preventing their Tweens from drinking more white milk are how much milk they currently drink and the variety of beverages milk is competing with. Sugar content top barrier related to chocolate milk consumption.

Top Barriers For Tweens Drinking White Milk[^]

My Tween doesn't drink more white milk because...

- They already drink a lot of white milk **15%**
- They like a wide variety of beverages, sometimes they want another drinks **14%**
- They don't like the taste of white milk **11%**



Top Barriers For Tweens Drinking Chocolate Milk[^]

My Tween doesn't drink more chocolate milk because...

- 15%** It's high in added sugar
- 11%** They like a wide variety of beverages, sometimes they want another drinks
- 10%** We're often out of CM at home
- 10%** They don't like the taste of CM

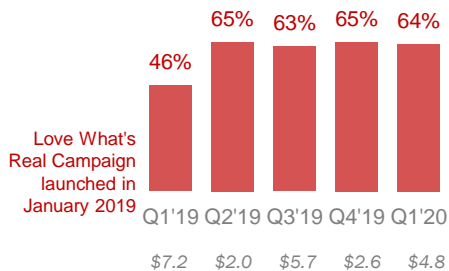
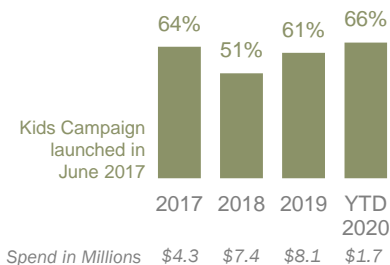
MilkPEP Advertising Awareness

Among Total Tweens

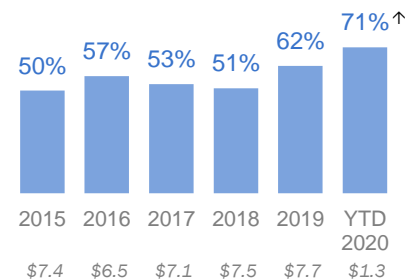
Awareness of the Built with Chocolate Milk Campaign has increased significantly in Q1'20; Kids Campaign awareness also continues to build, driven by both Tween Girls and Boys.

Kids Campaign Awareness Among...	2018	2019	YTD 2020
Tween Girls	52%	57%	61%
Tween Boys	51%	66%	72%

Campaign Awareness



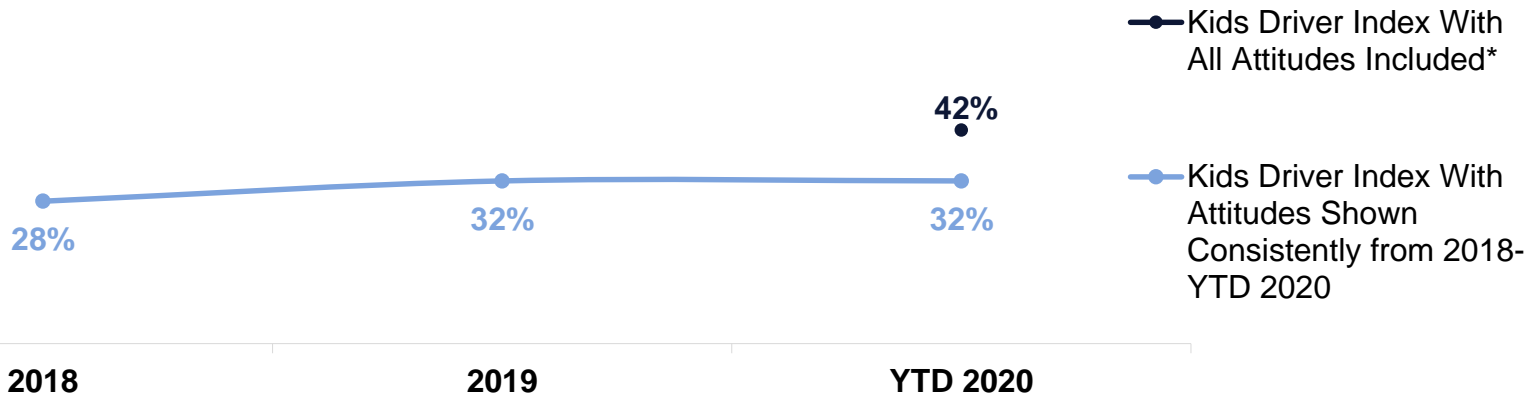
Built with Chocolate Milk



Agreement with Kids Index Among Tweens

Tweens' agreement with key milk attitudes remains on par with 2019. When considering attributes that were not shown consistently prior to this quarter, the index increases significantly.

Agreement: Kids Consumption Driver Index

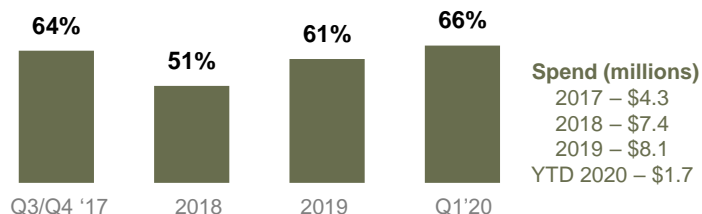


Overview of Kids Campaign

Among Tweens Aware of Campaign

Tweens who have seen the Kids Campaign have significantly higher recall of the campaign message in 2020 versus previous years. Despite higher recall, Tween milk consumption continues to slip among those aware of the Kids Campaign.

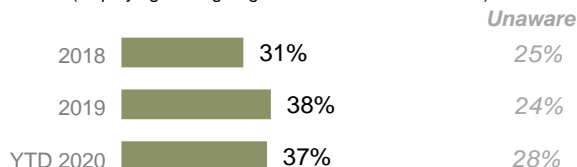
% Aware of the Kids Campaign



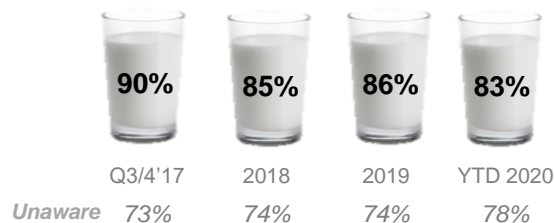
% Recall “Milk helps kids do the things they love▲”
Among Tweens Aware of Campaign



% Agree with Campaign-Specific Attitudes
Among Tweens Aware of Campaign
(displaying average agreement across statements)



% Consumed Milk in Past Day
Among Tweens Aware of Campaign

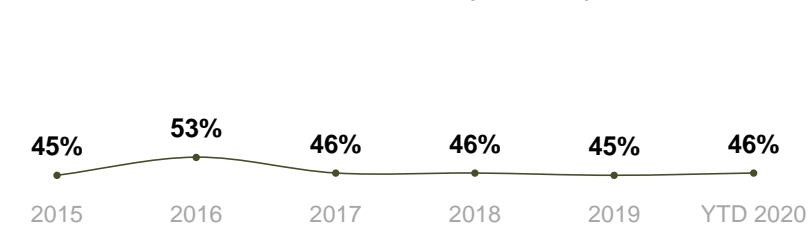


Snapshot of Teen Engagement with Milk

Among Total Teens

Similar to Tweens, healthiness perceptions, advertising awareness, and milk consumption among Teens remain steady this quarter.

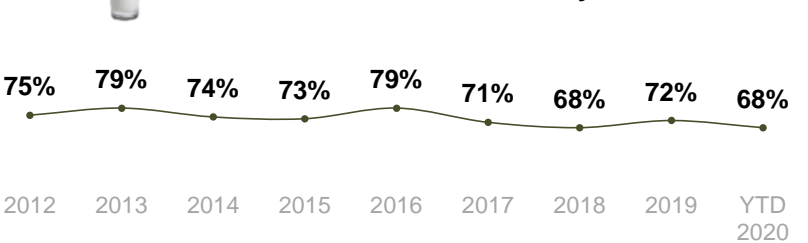
% Rate Milk Extremely Healthy



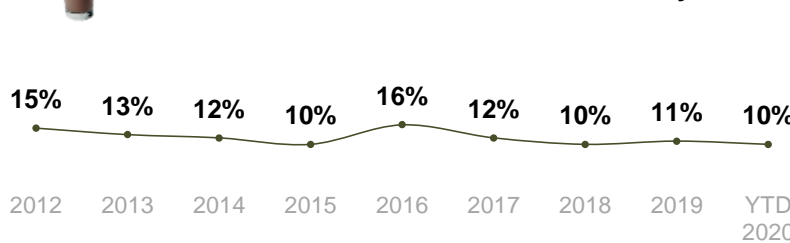
% Aware of MilkPEP Advertising



% Consumed Milk in Past Day



% Consumed **Chocolate** Milk in Past Day



Top Barriers to Milk Consumption

Among Total Teens

No barrier stands out as a clear leader for white milk consumption but stomach issues, food pairing and taste are among the top barriers for Teen white milk consumption. Similar to Moms and Tweens, sugar is the biggest barrier to increased CM consumption.

Top Barriers For Teens Drinking White Milk[^]

I don't drink more white milk because...

- Milk upsets my stomach **12%**
- White milk doesn't go well with the foods I eat **12%**
- I don't like the taste of white milk **11%**



Top Barriers For Teens Drinking Chocolate Milk[^]

I don't drink more chocolate milk because...

- 17%** It's high in added sugar
- 13%** We're often out of CM at home
- 10%** CM is too expensive compared to other beverages

MilkPEP Advertising Snapshot: Awareness Among Teens

Similar to Tweens, Teens' awareness of the Kids Campaign continues to trend upward at the start of 2020. For all campaigns, Teens' exposure to MilkPEP campaigns continues to be below their younger counterparts.

Kids Campaign Awareness Among...	2018	2019	YTD 2020
Teen Girls	42%	50%	51%
Teen Boys	42%	55%	59%



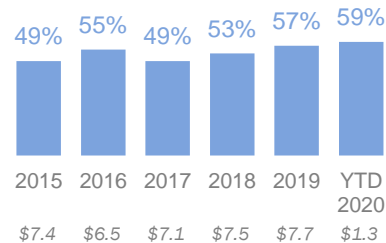
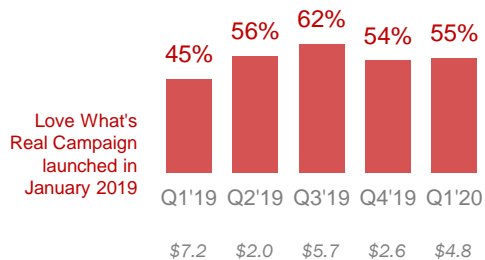
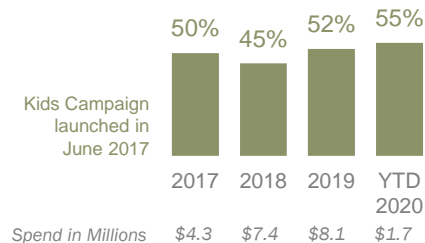
Kids Campaign



Love What's Real



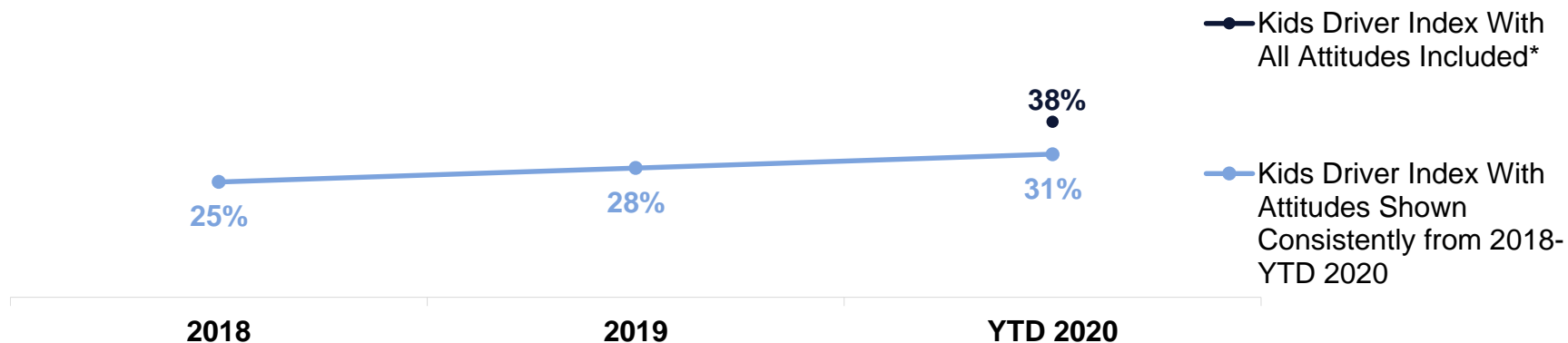
Built with Chocolate Milk



Agreement with Kids Index Among Teens

Over the past two years, Teens have experienced a slow and steady increase in agreement with key attitudes driving milk consumption.

Agreement: Kids Consumption Driver Index

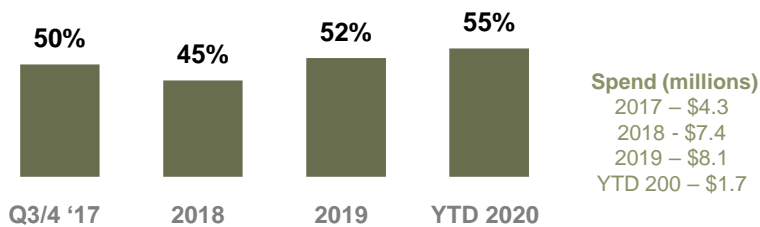


Overview of Kids Campaign

Among Teens

Teens aware of Kids Campaign advertising have higher recall of the campaign message and consume more milk versus those who are unaware. Teens' exposure is helping reinforce daily milk drinking habits; past day penetration declines among Teens unaware.

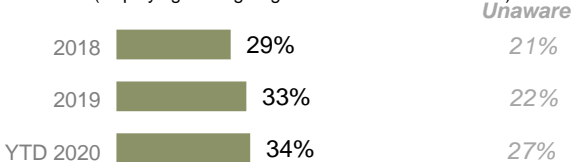
% Aware of the Kids Campaign



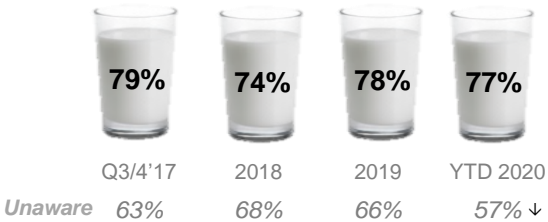
% Recall “Milk helps kids do the things they love▲”
Among Teens Aware of Campaign



% Agree with Campaign-Specific Attitudes
Among Teens Aware of Campaign
(displaying average agreement across statements)



% Consumed Milk in Past Day
Among Teens Aware of Campaign



radius | illumination

milk  pep