Milk, Creamers and Non-Dairy Milk - US - April 2014

Report Price: £2466.89 | $3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

"Opportunities for growth are present for the milk category to adapt to consumers' nutritional demand by diversifying flavor profiles and occasion usage. However, the industry faces obstacles in its efforts to reestablish itself as a healthy, functional beverage. Can consumers be convinced that dairy and non-dairy beverages are an attractive on-the-go addition to their lifestyles?"
– Elizabeth Sisel, Beverage Analyst

This report looks at the following areas:

- Can health angle turn around the milk category?
- Can milk retailers be successful in the on-the-go market?
- Is flavoring the answer to category innovation?
- How important is the refrigerated section to non-dairy products?

Respondents are most likely to consume milk as an accompaniment to food or another beverage, as an ingredient when cooking, and as a beverage with breakfast. Milk can be presented as being more versatile to meet a variety of usage occasions. To do this, milk manufacturers should aim to expand usage to on-the-go occasions by creating flavors, packaging, and fortified varieties that can be used as snacks, treats, or post-workout drinks.

Dairy milk dominates the segment, but consumer interest in non-dairy milk is growing, with almond milk sales surpassing that of soy milk for the first time. However, the other milk segment, led by plant-based milk brands, remains small and accounts for just 8.1% market share, according to SymphonyIRI Group multi-outlet sales data. Interest in coffee creamers is also seeing growth. Dairy and non-dairy brands are competing in their own segments and against each other. However, Mintel research suggests that consumers are likely to be active across multiple segments purchasing a variety of dairy and non-dairy products, not just one.

This report builds on the analysis presented in Mintel's Dairy and Non-dairy Milk – US, April 2013, as well as the April 2012 report of the same title and Milk – US, April 2010, as well as the May 2009, June 2007, May 2006, April 2003, and June 2001 reports of the same title.

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Milk, Creamers and Non-Dairy Milk - US - April 2014

Report Price: £2466.89 | $3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Scope and Themes

What you need to know

Definition

Data sources

Sales data

Consumer survey data

Abbreviations and terms

Abbreviations

Executive Summary

The market

Figure 1: Total US sales and fan chart forecast of milk, creamer, and non-dairy milk, at current prices, 2008-18

Other segment leads in growth, skim/low-fat milk continues to dominate

Figure 2: Total US retail sales of dairy milk, non-dairy milk, cream, and creamer, by segment, 2008-18

Market factors

Producers avoid “dairy cliff,” increased global demand hikes milk prices

Obesity concerns continue to drive health trends

Households with children top milk purchasers

Multicultural population growth encourages increased milk consumption

Retail channels

Figure 3: Total US retail sales of milk, creamer, and non-dairy milk, by channel, at current prices, 2011-13

Key players

Figure 4: MULO sales of dairy and non-dairy milk, by leading companies, rolling 52 weeks 2013

The consumer

Young consumers most increasing their dairy, non-dairy product purchases

Figure 5: Purchasing habits for dairy milk, non-dairy milk, cream, and creamer – Buying more, by generations, February 2014

Dairy, non-dairy products most consumed as an accompaniment, at home

Figure 6: Occasions and locations for drinking, February 2014

Younger consumers prefer refrigerated dairy, non-dairy, name brand products

Figure 7: Dairy milk, non-dairy milk, cream, and creamer purchasing attributes, by generations, February 2014

Respondents interested in natural sweeteners, sophisticated flavors for flavored milks

Figure 8: Attitudes and behaviors toward flavored dairy and non-dairy milk and cream/creamer – Any agree, February 2014

What we think

Issues and Insights

Can health angle turn around the milk category?

Issues

Insight

Report Price: £2466.89 | $3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Can milk retailers be successful in the on-the-go market?

Issues

Insight

Is flavoring the answer to category innovation?

Issues

Insight

How important is the refrigerated section to non-dairy products?

Issues

Insight

Trend Applications

Trend: Extend My Brand

Trend: The Big Issue

Trend: Transumers

Market Size and Forecast

Key points

Fluctuating milk prices, new health angle affect milk category growth

Figure 9: The Food-at-Home annual price change, by category, 2008-14

Sales and forecast of market

Figure 10: Total US retail sales of milk, creamer, and non-dairy milk, 2008-18

Figure 11: Total US retail sale of milk, creamer, and non-dairy milk, at inflation-adjusted prices, 2008-18

Fan chart forecast

Figure 12: Total US sales and fan chart forecast of milk, creamer, and non-dairy milk, at current prices, 2008-18

Market Drivers

Key points

Producers avoid “dairy cliff,” increased global demand hikes milk prices

Health trends put new spin on milk, childhood obesity remains a concern

Households with children more likely to purchase milk products

Figure 13: US households, by presence of own children, 2003-13

Multicultural population growth encourages increased milk consumption

Figure 14: Purchasing habits for dairy milk, non-dairy milk, cream, and creamer, by race, February 2014

Greater household disposable income supports high milk prices

Figure 15: Real disposable personal income, February 2007-October 2013

Competitive Context

Competition from other beverages

Figure 16: Non-alcoholic and alcoholic drink purchases, November 2013

Other forms of dairy already in the on-the-go, breakfast, health spaces

Segment Performance

Key points

Other segment drives category growth, skim/low-fat milk falters

Sales of market, by segment

Figure 17: Total US retail sales of milk, creamer, and non-dairy milk, by segment, at current prices, 2011 and 2013

Skim/low-fat milk remains category leader, but declines continue

Sales and forecast of refrigerated skim/low-fat milk

Figure 18: Total US retail sales and forecast of refrigerated skim/low-fat milk, 2008-18

Whole milk recovers from declines, new health trends may support growth

Sales and forecast of refrigerated whole milk

Figure 19: Total US retail sales of refrigerated whole milk, 2008-18

Flavored dairy milks could bounce back as milk benefits highlighted

Sales and forecast of refrigerated flavored milk/eggnog/buttermilk

Figure 20: Total US retail sales of refrigerated flavored milk/eggnog/buttermilk, 2008-18

Other segment sees high growth as non-dairy milk popularity surges

Sales and forecast of other milk products

Figure 21: Total US retail sales of other milk products (includes ready-to-drink milk/milk substitutes, refrigerated kefir/milk substitutes/soy milk; refrigerated milkshakes/non-dairy drinks), 2008-18

Cream/half & half segment remains small with consistent growth

Sales and forecast of refrigerated cream/half & half

Figure 22: Total US retail sales of refrigerated cream/half & half, 2008-18

Coffee creamer segment forecast to remain successful through 2018

Sales and forecast of coffee creamer

Figure 23: Total US retail sales of coffee creamer, 2008-18

Retail Channels

Key points

The other retail channel closing gap between channel leader supermarkets

Sales of market, by channel

Figure 24: Total US retail sales of milk, creamer, and non-dairy milk, by channel, at current prices, 2011-13

Supermarkets, drug stores struggle to reach pre-recession sales

Figure 25: Total US retail sales of milk, creamer, and non-diary milk, by channel, at current prices, 2008-13

Sales of dairy and non-dairy milk in the natural channel

Figure 26: Natural supermarket sales of dairy and non-dairy milk, at current prices, 2011-13

Figure 27: National supermarket sales of dairy and non-dairy milk, by segment, at current prices, 2011 and 2013

Figure 28: Natural supermarket sales of dairy and non-dairy milk, by organic content, 2011 and 2013

Figure 29: Natural supermarket sales of non-dairy milk, by type, 2011 and 2013

Figure 30: Natural supermarket sales of non-dairy milk, by shelf placement, 2011 and 2013

Leading Companies

Key points

National brands catching up to private label in milk market

Manufacturer sales of milk, creamer, and non-dairy milk

Figure 31: MULO sales of milk, creamer, and non-dairy milk, by leading companies, rolling 52 weeks 2012 and 2013

Brand Share – Dairy Milk

Key points

Skim/low-fat milk segment continues downward trend

Manufacturer sales of skim/low-fat milk

Figure 32: MULO sales of skim/low-fat milk, by leading companies, rolling 52 weeks 2012 and 2013

Brand loyalty strong in private label skim/low-fat milk

Figure 33: Key purchase measures for the top brands of skim/low-fat milk, by household penetration, 52 weeks ending Dec. 29, 2013 (current) and Dec. 29, 2012 (year ago)

Whole milk outpaces skim/low-fat category, reflecting organic preference

Manufacturer sales of whole milk

Figure 34: MULO sales of whole milk, by leading companies, rolling 52 weeks 2012 and 2013

Brand loyalty strong in private label whole milk

Figure 35: Key purchase measures for the top brands of whole milk, by household penetration, 52 weeks ending Dec. 29, 2013 (current) and Dec. 30, 2012 (year ago)

Flavored milk sales driven by BFY options, TruMoo leads the charge

Manufacturer sales of flavored milk/eggnog/buttermilk

Figure 36: MULO sales of flavored milk/eggnog/buttermilk, by leading companies, rolling 52 weeks 2012 and 2013

TruMoo sees increases in purchase volume

Figure 37: Key purchase measures for the top brands of flavored milk/eggnog/buttermilk, by household penetration, 52 weeks ending Dec. 29, 2013 (current) and Dec. 29, 2012 (year ago)

Brand Share – Non-dairy Milk

Key points

Plant-based milk products become segment leaders

Soy milk fails to impress as almond and coconut milk flourishes

Brand name is clear choice over private label in non-dairy milk segment

Nestlé's Nesquik sees little growth in non-dairy milk segment

Manufacturer sales of other milk

Figure 38: MULO sales of other* milk, by leading companies, rolling 52 weeks 2012 and 2013

Brand loyalty strong for name brand products in non-dairy milk

Figure 39: Key purchase measures for the top brands of milk substitutes/soy milk/kefir, by household penetration, 52 weeks ending Dec. 29, 2013 (current) and Dec. 29, 2012 (year ago)

Brand Share – Creamer and Cream

Key points

Nestlé dominates the creamers category, new flavors drive sales

Manufacturer sales of coffee creamer

Figure 40: MULO sales of coffee creamer, by leading companies, rolling 52 weeks 2012 and 2013

Brand loyalty supports branded coffee creamer sales

Figure 41: Key purchase measures for the top brands of coffee creamer, by household penetration, 52 weeks ending Dec. 29, 2013 (current) and Dec. 29, 2012 (year ago)

Private label controls cream segment, Dean Foods suffers big losses

Manufacturer sales of cream

Figure 42: MULO sales of dairy cream/half & half, by leading companies, rolling 52 weeks 2012 and 2013

Brand loyalty strong in private label dairy cream

Figure 43: Key purchase measures for the top brands of dairy cream/half & half, by household penetration, 52 weeks ending Dec. 29, 2013 (current) and Dec. 29, 2012 (year ago)

Innovations and Innovators

Protein power

Innovative flavors

Outside-the-jug packaging

Marketing Strategies

Overview of the brand landscape

The MilkPEP replaces “Got Milk?” slogan

Figure 44: The Milk Processor Education Program “Milk Life” print ad, February 2014

Figure 45: Milk, Make the most of your morning with milk. Milk Life., March 2014

Figure 46: Got Chocolate Milk?, Zach Parise - Drive, February 2014

Silk Almondmilk “helps you bloom”

Figure 47: Silk, Need a Reason to Try Silk?, December 2013

Figure 48: Silk, The Taste Might Surprise You, December 2013

Creamer sees success with branded partnerships

Baileys Creamers

Dunkin’ Donuts

Girl Scouts

Figure 49: Coffee-mate, Girl Scouts Commercial, January 2014

Social Media – Milk, Creamers, and Non-dairy Milk

Key points

Market overview

Key social media metrics

Figure 50: key social media metrics, March 2014

Brand usage and awareness

Figure 51: Brand usage and awareness for selected milk, creamer, and non-dairy milk brands, February 2014

Interactions with milk, creamer, and non-dairy milk brands

Figure 52: Interaction with selected milk, creamer, and non-dairy milk brands, February 2014

Leading online campaigns

Focusing on healthy living

Marketing to families

What we think

Online conversations

Figure 53: Online mentions of select milk, creamer, and non-dairy milk brands, by month, March 1, 2013-Feb. 28, 2014

Where are people talking about milk, creamer, and non-dairy milk brands?

Figure 54: Online mentions of select milk, creamer, and non-dairy milk brands, by page, March 1, 2013-Feb. 28, 2014

What are people talking about?

Figure 55: Mentions by topic of conversations, milk, creamer, and non-dairy milk brands, March 1, 2013-Feb. 28, 2014

Report Price: £2466.89 | $3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Purchasing Habits for Dairy Milk, Non-dairy Milk, Cream, and Creamer

Key points

Skim milk, almond milk, half & half, flavored creamer dominate segments

Young men consume largest variety of milks, creams/creamers

Figure 56: Purchasing habits for dairy milk, non-dairy milk, cream, and creamers – Any purchase, by gender and age, February 2014

Consumption, variety of category purchases decrease with age

Figure 57: Purchasing habits for dairy milk, non-dairy milk, cream, and creamer – Buying more, by generations, February 2014

Affluent households purchase most milk, creamer, and non-dairy milk

Figure 58: Purchasing habits for dairy milk, non-dairy milk, cream, and creamers – Any purchase, by household income, February 2014

Households with children more likely to purchase milk, creamer, and non-dairy milk products

Figure 59: Purchasing habits for dairy milk, non-dairy milk, cream, and creamers – Any purchase, by presence of children in household, February 2014

Northeastern, West regions purchase largest variety of milk, cream/creamer products

Figure 60: Purchasing habits for dairy milk, non-dairy milk, cream, and creamers – Any purchase, by region, February 2014

Southern households consume most non-dairy creamers

Figure 61: Household consumption of non-dairy cream substitutes, by region, November 2012-December 2013

Other races are highest purchasers of milk, cream/creamer

Figure 62: Purchasing habits for dairy milk, non-dairy milk, cream, and creamers – Any purchase, by race and Hispanic origin, February 2014

Consumers drinking both non-dairy and dairy products

Figure 63: Purchasing habits for dairy milk, non-dairy milk, cream, and creamers – Any purchase, by repertoire of dairy milk products, February 2014

Figure 64: Purchasing habits for dairy milk, non-dairy milk, cream, and creamers – Any purchase, by repertoire of non-dairy milk products, February 2014

Household consumption of milk decreasing

Figure 65: Household volume consumption of milk, November 2008-December 2013

Attributes Affecting Purchases of Dairy Milk, Non-dairy Milk, Cream, and Creamer

Key points

Packaging, retail shopping attributes, and product attributes fluctuate by generation

Packaging interest peaks with Millennials

Consumers prefer refrigerated dairy and non-dairy beverages

Manufacturers with refrigerated non-dairy products increase exposure with consumers

Older consumers buying private label, least interested in flavored offerings

Figure 66: Dairy milk, non-dairy milk, cream, and creamer purchasing attributes, by generations, February 2014

Households with children do not largely affect purchasing attributes

Figure 67: Dairy milk, non-dairy milk, cream, and creamer purchasing attributes, by presence of children in household, February 2014

Figure 68: Dairy milk, non-dairy milk, cream, and creamer purchasing attributes, by repertoire of dairy milk products, February 2014

Attitudes toward Dairy and Non-dairy Beverages

Key points

Dairy milk attitudes

Protein, nutrient claims have yet to overcome high calorie counts

Interest in growth-hormone-free dairy beverages continues

Report Price: £2466.89 | $3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Consumers not convinced of raw milk safety

Figure 69: Attitudes toward dairy and non-dairy products, by gender and age, February 2014

Attributes of both dairy and non-dairy milk

GMOs still in the minds of consumers

Young men lead in agreement with health attributes toward dairy and non-dairy milk

Figure 70: Attitudes toward dairy and non-dairy products, by gender and age, February 2014

Non-dairy milk attributes

Figure 71: Attitudes toward dairy and non-dairy products, by gender and age, February 2014

Reasons for Purchasing Other/Non-dairy Milk and/or Creamer

Key points

Other, non-dairy milk purchases influenced by taste, health benefits

Taste preference is leading reason behind other/non-dairy milk/creamer purchases

Younger consumers drawn to products' vitamin, mineral contents

Older consumers drink for lower calories, while young consumers drink for weight loss

Figure 72: Reasons for purchasing other/non-dairy milk and/or creamer, by gender and age, February 2014

Reasons for Purchasing Less Dairy and/or Non-dairy Milk, Cream, and/or Creamer

Key points

Milk prices, weight loss top concerns for milk purchases

Figure 73: Reasons for purchasing less dairy and/or non-dairy milk, cream, and/or creamer, by gender and age, February 2014

Significantly more consumers are drinking less/no milk

Figure 74: Purchasing habits for dairy milk, non-dairy milk, cream, and creamer – Buying less/none, by generations, February 2014

Households without children more likely to be purchasing less/no dairy/non-dairy products

Figure 75: Purchasing habits for dairy milk, non-dairy milk, cream, and creamer – Buying less/none, by presence of children in household, February 2014

Occasions and Location for Consuming Dairy and/or Non-dairy Milk, Cream, and/or Creamer

Key points

Milk most popular as an accompaniment, on-the-go concept still new

Milk most consumed as an accompaniment

Milk as a meal not yet popular with consumers

On-the-go dairy and non-dairy offerings yet to fully appeal to consumers

Figure 76: Occasions and locations for drinking, February 2014

Young men drinking dairy/non-dairy products at most occasions, locations

Figure 77: Occasions and locations for drinking – Any adult, by gender and age, February 2014

Figure 78: Occasions and locations for drinking – Any adult, by generations, February 2014

Consumption frequency increases with the number of milk types purchased

Figure 79: Occasions and locations for drinking – Any adult, by repertoire of dairy milk products, February 2014

Figure 80: Occasions and locations for drinking – Any adult, by repertoire of non-dairy milk products, February 2014

Attitudes and Behavior toward Flavored Dairy and Non-dairy Milk and Cream/Creamer

Key points

Interest in flavored milk attributes decreases with consumers' age

Consumer attitudes support sophisticated flavors, natural sweetener innovation

Figure 81: Attitudes and behaviors toward flavored dairy and non-dairy milk and cream/creamer – Any agree, by generations, February 2014

Households with children hold higher opinion of flavored products

Sophisticated dairy milk flavors have potential to appeal to households with and without children

Consumers show interest in stevia-sweetened flavored milk, healthy soft drink alternative

Competition comes in the form of flavored milk powders, liquids

Figure 82: Attitudes and behaviors toward flavored dairy and non-dairy milk and cream/creamer – Any agree, by presence of children in household, February 2014

Appendix – Other Useful Consumer Tables

Purchasing habits for dairy milk, non-dairy milk, cream, and creamer

Figure 83: Purchasing habits for dairy milk, non-dairy milk, cream, and creamer, February 2014

Figure 84: Purchasing habits for dairy milk, non-dairy milk, cream, and creamers – Any purchase, by generations, February 2014

Figure 85: Purchasing habits for dairy milk, non-dairy milk, cream, and creamers – Any purchase, by region, February 2014

Figure 86: Purchasing habits for dairy milk, non-dairy milk, cream, and creamers – Any purchase, by region, February 2014

Figure 87: Purchasing habits for dairy milk, non-dairy milk, cream, and creamer – Buying more, by gender, February 2014

Figure 88: Purchasing habits for dairy milk, non-dairy milk, cream, and creamer – Buying more, by presence of children in household, February 2014

Attributes affecting purchases of dairy milk, non-dairy milk, cream, and creamer

Figure 89: Dairy milk, non-dairy milk, cream, and creamer purchasing attributes, by gender and age, February 2014

Figure 90: Dairy milk, non-dairy milk, cream, and creamer purchasing attributes, by repertoire of dairy milk products, February 2014

Figure 91: Dairy milk, non-dairy milk, cream, and creamer purchasing attributes, by repertoire of non-dairy milk products, February 2014

Figure 92: Dairy milk, non-dairy milk, cream, and creamer purchasing attributes, by purchasing habits for dairy milk, non-dairy milk, cream, and creamer – Any purchase, February 2014

Attitudes toward dairy and non-dairy beverages

Figure 93: Attitudes toward dairy and non-dairy products, by generations, February 2014

Figure 94: Attitudes toward dairy and non-dairy products, by presence of children in household, February 2014

Figure 95: Attitudes toward dairy and non-dairy products, by gender and age, February 2014

Figure 96: Attitudes toward dairy and non-dairy products, by repertoire of dairy milk products, February 2014

Figure 97: Attitudes toward dairy and non-dairy products, by repertoire of non-dairy milk products, February 2014

Reasons for purchasing other/non-dairy milk and/or creamer

Figure 98: Reasons for purchasing other/non-dairy milk and/or creamer, by purchasing habits for dairy milk, non-dairy milk, cream, and creamer – Any purchase, February 2014

Figure 99: Reasons for purchasing other/non-dairy milk and/or creamer, by purchasing habits for dairy milk, non-dairy milk, cream, and creamer – Any purchase, February 2014

Occasions and locations for consuming dairy and/or non-dairy milk, cream, and/or creamer

Figure 100: Occasions and locations for drinking – Any adult, by presence of children in household, February 2014

Figure 101: Occasions and locations for drinking – Any adult, by race and Hispanic origin, February 2014

Attitudes and behavior toward flavored dairy and non-dairy milk and cream/creamer

Figure 102: Attitudes and behaviors toward flavored dairy and non-dairy milk and cream/creamer, February 2014

Figure 103: Attitudes and behaviors toward flavored dairy and non-dairy milk and cream/creamer – Any agree, by gender and age, February 2014

Figure 104: Attitudes and behaviors toward flavored dairy and non-dairy milk and cream/creamer – Any agree, by race/Hispanic origin, February 2014

Experian Marketing Services: Fall adult 2013

Figure 105: Household consumption of non-dairy cream substitutes, by type, by household income, November 2012-December 2013

Figure 106: Household consumption of non-dairy cream substitutes, by flavor, by region, November 2012-December 2013

Figure 107: Household consumption of non-dairy cream substitutes, by brand, by region, November 2012-December 2013

Figure 108: Household consumption of milk flavorings, by brand, by region, November 2012-December 2013

Figure 109: Household consumption of non-dairy cream substitutes, by type, by region, November 2012-December 2013

Appendix – Social Media – Milk, Creamers, and Non-dairy Milk

Brand usage or awareness

Figure 110: Brand usage or awareness, February 2014

Figure 111: Silk usage or awareness, by demographics, February 2014

Figure 112: Horizon Organic usage or awareness, by demographics, February 2014

Figure 113: Organic Valley usage or awareness, by demographics, February 2014

Figure 114: Blue Diamond Almond Breeze usage or awareness, by demographics, February 2014

Figure 115: Kemps usage or awareness, by demographics, February 2014

Figure 116: International Delight usage or awareness, by demographics, February 2014

Interactions with milk, creamer, and non-dairy milk brands

Figure 117: Activities done, February 2014

Figure 118: Silk – Activities Done – I have looked up/talked about this brand online on social media, by demographics, February 2014

Figure 119: Silk – Activities Done – I have contacted/interacted with the brand online on social media to, by demographics, February 2014

Figure 120: Silk – Activities Done – I follow/like the brand on social media because, by demographics, February 2014

Figure 121: Silk – Activities Done – I have researched the brand on social media to, by demographics, February 2014

Figure 122: Horizon Organic – Activities Done – I have looked up/talked about this brand online on social media, by demographics, February 2014

Figure 123: Horizon Organic – Activities Done – I have contacted/interacted with the brand online on social media to, by demographics, February 2014

Figure 124: Horizon Organic – Activities Done – I follow/like the brand on social media because, by demographics, February 2014

Figure 125: Horizon Organic – Activities Done – I have researched the brand on social media to, by demographics, February 2014

Figure 126: Organic Valley – Activities Done – I have looked up/talked about this brand online on social media, by demographics, February 2014

Figure 127: Organic Valley – Activities Done – I have contacted/interacted with the brand online on social media to, by demographics, February 2014

Figure 128: Organic Valley – Activities Done – I follow/like the brand on social media because, by demographics, February 2014

Figure 129: Organic Valley – Activities Done – I have researched the brand on social media to, by demographics, February 2014

Figure 130: Blue Diamond Almond Breeze – Activities Done – I have looked up/talked about this brand online on social media, by demographics, February 2014

Figure 131: Blue Diamond Almond Breeze – Activities Done – I have contacted/interacted with the brand online on social media to, by demographics, February 2014

Figure 132: Blue Diamond Almond Breeze – Activities Done – I follow/like the brand on social media because, by demographics, February 2014

Figure 133: Blue Diamond Almond Breeze – Activities Done – I have researched the brand on social media to, by demographics, February 2014

Figure 134: Kemps – Activities Done – I have looked up/talked about this brand online on social media, by demographics, February 2014

Figure 135: Kemps – Activities Done – I follow/like the brand on social media because…., by demographics, February 2014

Figure 136: Kemps – Activities Done – none of the above, by demographics, February 2014

Figure 137: International Delight – Activities Done – I have looked up/talked about this brand online on social media, by demographics, February 2014

Figure 138: International Delight – Activities Done – I have contacted/interacted with the brand online on social media to, by demographics, February 2014

Figure 139: International Delight – Activities Done – I follow/like the brand on social media because, by demographics, February 2014

Figure 140: International Delight – Activities Done – I have researched the brand on social media to, by demographics, February 2014

Key social media metrics

Figure 141: Social media metrics – Silk, March 2014

Figure 142: Social media metrics – Blue Diamond Almond Breeze, March 2014

Figure 143: Social media metrics – Horizon Organic, March 2014

Figure 144: Social media metrics – International Delight, March 2014

Figure 145: Social media metrics – Organic Valley, March 2014

Figure 146: Social media metrics – Kemps, March 2014

Online conversations

Figure 147: Online mentions of select milk, creamer, and non-dairy milk brands, by month, March 1, 2013-Feb. 28, 2014

Figure 148: Online mentions of select milk, creamer, and non-dairy milk brands, by page, March 1, 2013-Feb. 28, 2014

Figure 149: Mentions by topic of conversations, milk, creamer, and non-dairy milk brands, March 1, 2013-Feb. 28, 2014

Appendix – Information Resources Inc. Builders Panel Data Definitions

Information Resources Inc. Consumer Network Metrics

Appendix – Trade Associations