## QUESTIONNAIRE

|  |  |
| --- | --- |
| PROJECT NAME: | Concept & Organic Evaluation |
| CLIENT: | **Freedom Foods** |
| JOB NUMBER: | **200XXX** |
| SAMPLE DESCRIPTION: | **Sample: n=600 interviews**  **Methodology: Online**  **Length: 20 minutes**  **Number of Concepts: 10** |
| DATE: | **January 2021** |

**SAMPLING FRAME**

**TOTAL SAMPLE N=~600 RESPONDENTS (Dependent on assignment into concepts based off category consumption)**

* + Males/ females aged 18-70
  + Nat Rep
  + L12M buyers of plant based and or UHT Dairy milks

**FIELDWORK QUOTAS PER AD**

**SOFT QUOTAS AT A TOTAL LEVEL TO BE CLOSE TO BELOW. IF SKEW OFF MORE THAN 5% LIMITS TO BE PLACED**

|  |  |  |
| --- | --- | --- |
| **GENDER** |  | **600** |
| Male | 49% | 293 |
| Female | 51% | 307 |
| **AGE** |  | **Target** |
| 18-24 | 12% | 73 |
| 25-34 | 18% | 108 |
| 35-44 | 19% | 111 |
| 45-54 | 18% | 107 |
| 55+ | 33% | 200 |
| **REGION** |  | **Target** |
| New South Wales | 32% | 193 |
| Victoria | 25% | 149 |
| Queensland | 20% | 121 |
| Western Australia | 10% | 62 |
| South Australia | 7% | 45 |
| Tasmania | 2% | 14 |
| Australian Capital Territory | 2% | 10 |
| Northern Territory | 1% | 6 |

**ASSIGN EACH CONCEPT BELOW TO AIM FOR APPROX ~300 IN HIDCAT 1 ALLOCATION**

|  |  |
| --- | --- |
| **CONCEPTS** | **HIDCAT 1** |
| 1. Australia’s Own Barista Oat Iced Latte | ~240 |
| 1. Australia’s Own Plant Power Blends | ~240 |
| 1. Australia’s Own Plant Protein Smoothies | ~240 |
| 1. Australia’s Own Hazelnut Milk | ~240 |
| 1. Australia’s Own Walnut Milk | ~240 |
| 1. Australia’s Own Cashew Milk | ~240 |
| 1. Australia’s Own Original Oat Milk | ~240 |
| 1. Australia’s Own Organic Oat Milk | ~240 |
| 1. Australia’s Own a2 Pro Protein | ~240 |
| 1. Australia’s Own a2 Lactose Free Milk | ~240 |

**QUESTIONNAIRE FLOW**

| Section: | Aim: | Timing: |
| --- | --- | --- |
| SCREENER | *Demographic profiling* | **1 min** |
| CONSUMPTION BEHAVIOUR | *Current category and brand consumption (incl. frequency)*  *Drivers of brand choice and brand association with organic* | **4 mins** |
| ATTRACTION | *Swiping exercising for around max 8 concepts* | **2 mins** |
| PREFERENCE | *Trade-off exercise for up to 8 concepts per respondent* | **2 mins** |
| DIAGNOSTICS | *Likes/dislike verbatim and diagnostics for 4 concepts* | **6 mins** |
| ORGANIC EVALUATION | *Assess understanding of organic and its importance* | **5 mins** |
| DEMOGRAPHICS | *For further profiling* | **1 min** |
| TOTAL |  | **20 mins** |

|  |  |
| --- | --- |
| **INTRODUCTION** |  |

**SHOW THE INTRODUCTION AND QC1 ON SAME SCREEN**

Welcome to our survey!

The survey will take around 20 minutes for you to complete, but before we start we’d like to remind you that the company sponsoring this survey relies upon the results to make key business decisions. It’s therefore very important that you **provide considered and accurate responses.**

At the end of the survey we’ll ask you to verify a number of your answers for **quality checking purposes** therefore please answer honestly and with consideration.

**QC1**     Are you happy to proceed?

1.  Yes – **CONTINUE**

2.  No – **TERMINATE**

|  |  |
| --- | --- |
| **SECTION S: SCREENER** | **1 MINS** |

**TERMINATE AS SOON AS RESPONDENTS FAIL QUOTAS I.E. DON’T WAIT UNTIL TH END OF THE SCREENER SECTION**

**SCRIPTER: SHOW TEXT BELOW AND S1 ON SAME PAGE**

**INTRO:** Firstly, a few quick questions to make sure we’re surveying a good cross-section of the population.

**S1** **INDUSTRY**

Do you or any of your immediate family work in any of the following industries?

*Select all that apply* **ROTATE,****MR**

1. Marketing, advertising or media
2. Market research
3. Public relations
4. Food manufacturing, service or retail
5. Banking and finance
6. Hospitality
7. Airlines or travel
8. Manufacturing or sale of automobiles
9. None of these **[EXCL, KEEP POSITION]**

**IF CODE 1-4 TERMINATE**

**S2** **AGE**

How old are you?

*Please write your age in the box provided*

\_\_\_\_\_\_\_\_\_

**TERMINATE IF UNDER 18 OR OVER 70**

**CHECK QUOTAS**

**S2a HIDDEN – AUTO CODE INTO THE FOLLOWING BREAKS**

1. 18-24
2. 25-34
3. 35-44
4. 45-54
5. 55-64
6. 65-70

**S3** **GENDER**

Are you? **SR**

1. Male
2. Female

**CHECK QUOTAS**

**S4a** **POSTCODE**

What is your postcode?

|  |  |  |  |
| --- | --- | --- | --- |
|  |  |  |  |

**ALLOW 4 DIGITS – TERMINATE IF INVALID POSTCODE ENTERED**

**S4b HIDDEN - METRO VS. REGIONAL – SR PUNCH FROM POSTCODE**

1. Metro
2. Regional

**S4c HIDDEN – STATE – CHECK QUOTAS**

1. New South Wales
2. Victoria
3. Queensland
4. South Australia
5. Western Australia
6. Northern Territory
7. Australian Capital Territory
8. Tasmania

**S5. HAVE CHILDREN**

Do you have children, either living in your household or out of home? **SR**

1. Yes
2. No

**S6.** **HOUSEHOLD STRUCTURE**

Which of the following best describes the household you live in? **SR**  
*Please select the one answer that most applies.*

1. Live with parents or boarding
2. Live alone
3. Live in a shared adult household
4. Live with partner
5. **IF S5=1** Live with my partner and children
6. **IF S5=1** Live with my children

**ASK IF HAVE CHILDREN AT HOME (S6=5-6)**

**S7.** **AGE OF CHILDREN**

Which of the following age groups do your children **living at home** fall into?

*Please select all that apply.*

1. Under 5 years
2. 5-12 years
3. 13-15 years
4. 16-18 years
5. 18+ years

**HIDDEN**

**S7b. LIFE STAGE**

1. Young SINKS/DINKS **(S3<30 & S6=2/4)**
2. Older SINKS/DINKS **(S3>29 S6=2/4)**
3. Young family **(S5=1 & S6=5/6 & S7=1/2)**
4. Older family **(S5=1 & S6=5/6 & S7 NOT 1/2)**
5. Empty nester **(S5=1 & S6=2-4)**
6. Live with parents **(S6=1)**

**S8** **CATEGORY PURCHASING**

Which of the following have you bought in the last 12 monthsfor yourself or someone in your household? **MR, ROTATE**

3. Breakfast cereals

6. Vitamins and minerals

7. Dietary supplements

8. Plant based milk (e.g. soy, almond)

9. Fresh cow’s milk (incl. lactose free) found in the refrigerator

10.Long life dairy milk

11. Flavoured milk drinks

12. Chilled coffee drinks

13. Ready to drink smoothies

14. Barista coffee (e.g. from a café, restaurant or other food outlet)

15. Packaged coffee (e.g. instant, coffee pods/capsules, roast & ground, sachets)

99. None of these

**ASK IF S8=8**

**S8b. PLANT BASED MILK TYPES BOUGHT**

Which if the following plant-based milk types have you bought in the last 12 months? **MR. ROTATE**

1. Soy milk
2. Almond milk
3. Oat milk
4. Rice milk
5. Coconut milk
6. Macadamia milk
7. Hemp milk
8. Pea milk
9. Other (please specify)

**S9. BRAND AWARENESS**

Looking at the following list of plant based **[ONLY SHOW IF S8=10)** and long life dairy**]** milk **brands**, which have you ever heard of? **MR. ROTATE 1-23. SHOW LOGOS**

1. Australia's Own
2. Almond Breeze
3. ~~MILKLAB~~
4. So Good
5. Vitasoy
6. Pure Harvest
7. Bonsoy
8. ~~Alpro~~
9. Liddells **(ONLY SHOW IF S8=10)**
10. Paul's **(ONLY SHOW IF S8=10)**
11. Nutty Bruce
12. Oatly
13. Minor Figures
14. Califia Farms
15. ~~Alternative Dairy~~
16. ~~Happy Happy Soy Boy~~
17. Coles
18. Woolworths Select
19. Macro
20. ~~Suncoast~~
21. ~~Living Planet~~
22. ~~Inside Out~~
23. Devondale **(ONLY SHOW IF S8=10)**
24. Other (please specify)

**S10. BRAND PURCHASE L12M**

Which of these have you bought in the **last 12 months**? **MR. SHOW CODES SELECTED AT S9**

**TRACK THOSE WHO HAVE BOUGHT AO IN THE LAST 12 MONTHS (S10=1)**

**HIDCAT1. ATTRACTION & PREFERENCE QUALIFICATION (SECTION (B&C)**

**SECTION B & D: ATTRACTION & DIAGNOSTICS. SHOW MAX 4 CONCEPTS FROM 1-8 (IF S8=8) AND 9-10 (IF S8-10)**

**SECTION C: PREFERENCE: SHOW AO & COMPETITOR OAT CONCEPTS (7,8, 11-14)**

**REFER TO CONCEPT PPT – EACH ARE NUMBER IN TOP RIGHT CORNER (DON’T SHOW)**

**PRICE IS INCLUDED IN TOP RIGHT CORNER (DON’T SHOW) – THIS IS TO BE USED FOR PIPING IN AT D10.**

**PLANT BASED MILKS (QUALIFY IF S8=8)**

1. Australia’s Own Barista Oat Iced Latte
2. Australia’s Own Plant Power Blends
3. Australia’s Own Plant Protein Smoothies
4. Australia’s Own Hazelnut Milk
5. Australia’s Own Walnut Milk
6. Australia’s Own Cashew Milk
7. Australia’s Own Original Oat Milk
8. Australia’s Own Organic Oat Milk

**UHT DAIRY MILKS (QUALIFY IS S8=10)**

1. Australia’s Own a2 Pro Protein
2. Australia’s Own a2 Lactose Free Milk

**COMPETITOR CONCEPTS**

1. Vitasoy Oat Milk
2. Oatly Oat Milk
3. So Good Oat Milk
4. Pure Harvest Oat Milk

**Qualified Page**

***Thank you. You have now qualified to complete the remainder of the survey. Just a reminder the survey will take approximately 20 minutes to complete. Your answers will remain strictly confidential.***

**Screen Out Page**

***Thank you for your interest. However, at this time, we are looking for survey respondents who fit a different profile. Please do not be discouraged, as there may be future studies to which you will be invited to participate***.

|  |  |
| --- | --- |
| **SECTION A: CONSUMPTION BEHAVIOUR** | **4 MINS** |

**A2.** **PURCHASE FREQUENCY**

How frequently do you purchase these products? **SR PER ROW.**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **RANDOMISE ROWS** | At least once a week | Once every 2 weeks | Once a month | Once every 2-3 months | Once every 4-6 months | At least once a year | Less often |
| Plant based milk (e.g. soy, almond) **SHOW IF S8=8** | 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| Long life dairy milk **SHOW IF S8=10** | 1 | 2 | 3 | 4 | 5 | 6 | 7 |

**ASK OF ONLY PLANT BASED MILK BUYERS (S8=4)**

**A2b.** **DRIVERS OF PURCHASING**

Which of the following are most important to you when choosing which **plant based milk** to buy? Select and rank the 3 most important. **ALLOW TO SELECT AND RANK MAX 3. ROTATE**

1. Made from natural ingredients
2. ~~A source of vitamins~~
3. Source of calcium, vitamins and minerals
4. Organic
5. Price
6. The brand
7. The taste
8. The type of milk (e.g. Almond, Oat, Soy etc.)
9. Made in Australia
10. Low in fat
11. No artificial colours, flavours or preservatives
12. That it’s unsweetened

Made with 100% Australian ingredients

Is a sustainable brand

1. Gives back to the community

**A2c. BRAND IMAGERY ASSOCIATIONS**

Which, if any, of the following statements would you associate with each brand? **MR. SHOW UP TO 5 MASTERBRANDS AWARE OF AT S9. ALWAYS SHOW AUSTRALIA’S OWN AND RANDOMLY SELECT UP TO 4 OTHERS. ROTATE**

1. Trusted
2. High quality
3. A brand that is unique
4. Is for people/families like me
5. Is good value for money
6. Is worth paying more for
7. Is more natural than others
8. Great tasting
9. Better for me/my family
10. Is a sustainable brand
11. Supports a healthy lifestyle
12. Best nutrition
13. Best plant-based milk
14. Is always on promotion
15. An Australian Brand
16. Is a cheap brand
17. Helps me feel good
18. Made with Australian ingredients

**A2d** Which, if any of these brands are organic? **MR.** **SHOW BRANDS AWARE OF AT S9. ROTATE. INCLUDE AN OPTION “None of these / Don’t Know”**

**A4. BRAND CONSUMPTION L12M**

Which of these have you bought in the **last 12 months**? **MR, SHOW THE SKU’S BASED OFF BRANDS PURCHASED AT S10**

|  |  |  |
| --- | --- | --- |
|  | **SHOW SKU’S BASED ON MASTERBRAND BOUGHT IN L12M AT S10** | **SELECTED AT S10** |
| 1 | Australia’s Own Organic Almond Unsweetened | Australia's Own |
| 2 | Australia’s Own Almond Protein Plus |
| 3 | Australia’s Own Like Milk Unsweetened |
| 4 | Australia’s Own Organic Coconut |
| 5 | Australia’s Own Barista Almond |
| 6 | Australia’s Own Barista Macadamia |
| 7 | Australia’s Own Dairy Milk |
| 8 | Australia’s Own A2 Milk |
| 9 | Almond Breeze Unsweetened | Almond Breeze |
| 10 | Almond Breeze Flavoured |
| 11 | Almond Breeze Barista Blend |
| 18 | So Good Nut | So Good |
| 19 | So Good Soy |
| 20 | So Good Barista Oat |
| 21 | So Good Barista Almond |
| 22 | So Good Barista Soy |
| 23 | So Good Prebiotic |
| 25 | Vitasoy | Vitasoy |
| 26 | Vitasoy Soy Milky |
| 27 | Vitasoy Oat |
| 28 | Vitasoy Soy Protein Plus |
| 29 | Vitasoy Rice |
| 30 | Vitasoy Home Barista Oat |
| 31 | Vitasoy Home Barista Almond |
| 32 | Vitasoy Home Barista Soy |
| 33 | Vitasoy Prebiotic Soy |
| 34 | Pure Harvest Almond | Pure Harvest |
| 35 | Pure Harvest Coco Quench |
| 36 | Pure Harvest Almond Quench |
| 37 | Pure Harvest Hazel Quench |
| 38 | Pure Harvest Golden Quench |
| 39 | Pure Harvest Rice |
| 40 | Pure Harvest Oat |
| 41 | Bonsoy Soy | Bonsoy |
| 42 | Bonsoy Almond |
| 43 | Bonsoy Coconut |
| 51 | Liddells Lactose Free | Liddells |
| 52 | Paul’s Zymil | Paul's |
| 53 | Nutty Bruce Almond | Nutty Bruce |
| 54 | Nutty Bruce Coconut |
| 55 | Nutty Bruce Almond & Oat |
| 56 | Nutty Bruce Almond & Coconut |
| 57 | Oatly | Oatly |
| 58 | Oatly Barista Blend |
| 59 | Oatly Flavoured |
| 60 | Minor Figures | Minor Figures |
| 61 | Califia Farms Almond | Califia Farms |
| 62 | Califia Farms Oat Barista Blend |
| ~~66~~ | ~~Happy Happy Soy Boy~~ | ~~Happy Happy Soy Boy~~ |
| 67 | Coles Almond | Coles |
| 68 | Coles Soy |
| 69 | Woolworths Select Almond | Woolworths Select |
| 70 | Woolworths Select Full Cream Dairy |
| 71 | Woolworths Select Free From Lactose |
| 72 | Woolworths Select Soy |
| 73 | Macro Organic Almond | Macro |
| 74 | Macro Organic Soy |
| 78 | Devondale Full Cream Long Life | Devondale |
| 79 | Devondale Skim Long Life |
| 98 | Other (please specify) |  |
| 99 | None of these **(EXCLUSIVE)** |  |

**A4a. BRAND CONSUMPTION L3M**

Which of these have you bought in the **last 3 months**? **MR, SHOW THOSE SELECTED AT A4**

**A5**. **BRAND CONSUMPTION L4W**

And which of these have you bought in the **last 4 weeks? MR, SHOW THOSE SELECTED AT A4a**

**A5a.** **BRAND PURCHASED MOST OFTEN**

And which of these brands do you purchase most often**? SR, SHOW THOSE SELECTED AT A4. AUTOCODE IF ONLY ONE BRAND SELECTED AT A4.**

**INTRO** We would now like you to undertake a short exercise to indicate which product or products you bought last time and plan to buy in the future.

**SHOW SHOPPER SHELF EXERCISE WITH THE FOLLOWING SKU’S AND PRICES. SEE CORRESPONDING PPT WITH SKU’S. RESPONDENTS TO BE ASSIGNED TO EITHER ALMOND OR SOY VARIANTS BASED ON PURCHASING AT S8B. IF QUALIFY FOR BOTH, ASSIGN BASED ON LEAST FILL. ROTATE ORDER SHOWN AMONG RESPONDENTS**

|  |  |  |
| --- | --- | --- |
| **ALMOND VARIANTS (SHOW IF S8B=2)** | | |
| **#** | **SKU** | **PRICE** |
| 1 | Australia's Own Organic Almond 1L | $2.80 |
| 2 | Almond Breeze Unsweetened Almond 1L | $2.50 |
| 3 | So Good Unsweetened Almond 1L | $2.70 |
| 4 | Vitasoy Unsweetened Almond 1L | $3.00 |
| 5 | So Good Almond Original 1L | $2.70 |
| 6 | Woolworths Almond 1L | $2.00 |
| 7 | Australia's Own Barista Almond 1L | $4.50 |
| 9 | Pureharvest Almond 1L | $3.10 |
| 10 | So Good Barista Almond 1L | $4.00 |
| 12 | Macro Organic Almond 1L | $2.80 |
| 13 | Bonsoy Almond 1L | $4.80 |
| 15 | Pureharvest Organic Almond 1L | $3.40 |
| 16 | Almond Breeze Barista Blend 1L | $4.00 |
| 18 | Pureharvest Almond Quench 1L | $3.50 |
| 19 | Vitasoy Almond Barista 1L | $4.00 |
| 20 | Coles Almond 1L | $2.00 |
| 21 | Coles Dairy Free Barista Almond 1L | $3.50 |
| 22 | Australia's Own Almond 1L | $2.80 |

|  |  |  |
| --- | --- | --- |
| **SOY VARIANTS (SHOW IF S8B=1)** | | |
| **#** | **SKU** | **PRICE** |
| 1 | Australia's Own Organic Soy 1L | $1.80 |
| 2 | Woolworths Soy 1L | $1.15 |
| 3 | So Good Regular soy 1L | $1.90 |
| 4 | Macro Organic Soy 1L | $1.60 |
| 5 | So Good Soy Lite 1L | $1.90 |
| 6 | Vitasoy Calci Plus Soy 1L | $3.00 |
| 7 | Bonsoy Soy 1L | $4.80 |
| 8 | Pureharvest Organic Malt Free Soy 1L | $1.70 |
| 9 | Vitasoy Soy Milky 1L | $2.45 |
| 10 | Vitasoy Soy Milky Lite 1L | $2.45 |
| 11 | Vitasoy Original Soy 1L | $3.00 |
| 13 | So Good Barista Soy 1L | $3.00 |
| 16 | So Good Vanilla Soy 1L | $3.00 |
| 18 | Vitasoy Soy Barista 1L | $3.00 |
| 19 | Coles Soy 1L | $1.15 |
| 20 | Coles Organic Soy 1L | $1.60 |
| 21 | Australia's Own Soy 1L | $1.80 |

**A6a. BOUGHT LAST TIME**

Thinking about the last time you purchased plant based milks, which of the following did you buy? **MR. FOR ALMOND, SHOW 1-21. FOR SOY SHOW 1-20. SHOW AN OPTION UNDERNEATH THAT’S STATES ‘I did not but any of these last time’**

**A6b.** **BUY NEXT TIME**

Thinking about the next time you purchase plant based milks, if the following brands were available at the below price points, which do you think you will buy? *Please select all that apply* **MR. FOR ALMOND, SHOW 1-21. FOR SOY SHOW 1-20. SHOW AN OPTION UNDERNEATH THAT’S STATES ‘I would not but any of these next time’**

**A6c**. **BUY NEXT TIME – NON ORGANIC AO VARIANTS**

We have made some changes to the brands available and the prices. If the following brands were available at the below price points, which do you think you will buy? **MR. FOR ALMOND, SHOW 2-22. FOR SOY SHOW 2-21. SHOW AN OPTION UNDERNEATH THAT’S STATES ‘I would not but any of these next time’**

**ASK IF AWARE OF AO (CODE 1 AT S9)**

**A7. AO BRAND IMAGERY ASSOCIATIONS - PRE**

To what extent do you agree or disagree with each of the below about **Australia’s Own**? **SR PER ROW. ROTATE STATEMENTS. SHOW AS GRID**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **RANDOMISE STAMENTS** | **Strongly disagree** | **Slightly disagree** | **Neither agree nor disagree** | **Slightly agree** | **Strongly agree** |
| Trusted | 1 | 2 | 3 | 4 | 5 |
| High quality | 1 | 2 | 3 | 4 | 5 |
| A brand that is unique | 1 | 2 | 3 | 4 | 5 |
| Is for people/families like me | 1 | 2 | 3 | 4 | 5 |
| Is worth paying more for | 1 | 2 | 3 | 4 | 5 |
| Artificial | 1 | 2 | 3 | 4 | 5 |
| Great tasting | 1 | 2 | 3 | 4 | 5 |
| Better for me/my family | 1 | 2 | 3 | 4 | 5 |
| Is more natural than others | 1 | 2 | 3 | 4 | 5 |
| Supports a healthy lifestyle | 1 | 2 | 3 | 4 | 5 |
| Best nutrition | 1 | 2 | 3 | 4 | 5 |

**ASK ALL**

**A8. RTB MAXDIFF**

We’re going to show youa number of different ways that **Australia’s Own** could talk about their range of **plant based milks**.In each scenario, please choose which of these would be **MOST LIKELY** to influence you to **buy Australia’s Own** over another brand, and which would **LEAST** influence you to buy Australia’s Own

**INSERT MAXDIFF EXERCISE**

1. Made from Certified organic ingredients
2. Made from Organic ingredients
3. Made with natural ingredients with no stablisers or thickeners
4. Fortified with Calcium, Vitamins & Minerals
5. Packed full of nutritional good stuff
6. Smooth natural taste
7. Sustainably sourced, local Australian ingredients
8. Australian made and owned
9. We work with closely with our Australian growers
10. Nourishing myself with pure Australian goodness
11. Vegan
12. Diary & Lactose free
13. Allergy free

**ASK IF AWARE OF AO IS ORGANIC AT A2d. SHOW A9a AND A9b ON SAME SCREEN**

**A9a. NON-ORGANIC PROMPTED IMPACT**

If the Australia’s Own range of plant based milks were no longer organic, how would this impact your likelihood to buy them **SR**

1. Much more likely to buy
2. Somewhat more likely to buy
3. No change
4. Somewhat less likely to buy
5. Much less likely to buy

**A9b.** **IMPACT VERBATIM**

Why is that? **OE TEXT BOX**

**ASK IF AWARE OF AO IS ORGANIC AT A2d**

**A10. AO IMAGERY ASSOCIATION - POST**

And if the range of Australia’s Own plant based milks were no longer organic, would it change any of these perceptions of the brand? *Your previous responses are shown below, you are able to change these if your pereptions have changed* **SR PER ROW. ROTATE. SHOW RESPONSE FROM A7 ~~FOR AUSTRALIAS OWN~~ AND ALLOW RESPONDENT TO CHANGE ANSWER. SHOW AS GRID**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **RANDOMISE STAMENTS** | **Strongly disagree** | **Slightly disagree** | **Neither agree nor disagree** | **Slightly agree** | **Strongly agree** |
| Trusted | 1 | 2 | 3 | 4 | 5 |
| High quality | 1 | 2 | 3 | 4 | 5 |
| A brand that is unique | 1 | 2 | 3 | 4 | 5 |
| Is for people/families like me | 1 | 2 | 3 | 4 | 5 |
| Is worth paying more for | 1 | 2 | 3 | 4 | 5 |
| Artificial | 1 | 2 | 3 | 4 | 5 |
| Great tasting | 1 | 2 | 3 | 4 | 5 |
| Better for me/my family | 1 | 2 | 3 | 4 | 5 |
| Is more natural than others | 1 | 2 | 3 | 4 | 5 |
| Supports a healthy lifestyle | 1 | 2 | 3 | 4 | 5 |
| Best nutrition | 1 | 2 | 3 | 4 | 5 |

|  |  |
| --- | --- |
| **SECTION B: ATTRACTION** | **2 MINS** |

**SHOW ASSIGNED CONCEPTS FROM HIDCAT1. SHOW EACH CONCEPT 1 AT A TIME - ROTATE ORDER. DO NOT ALLOW THEM TO SWIPE FOR 5 SECONDS AFTER THE CONCEPT IS SHOWN**

**NEW SCREEN** We’re now going to show you a variety of new product ideas, one at a time. You will be asked make a choice on whether you find it appealing or not. Below are instructions on how to do so wether taking the survey on a desktop or on a mobile device:

**Laptop:** Please click and drag the image to the left or the right

**Mobile device**: Please swipe the image to the left or the right.

**SHOW THE BELOW TEXT IN A LARGER FONT AND IN BOLD**

**LEFT = Not Appealing RIGHT = Appealing**

**Please read each idea** fully before you make your selection. The option to make your choice will be disabled for the first few seconds to allow time to fully read the text.

Click Continue when you are ready to start~~.~~

|  |  |
| --- | --- |
| **SECTION C: PREFERENCE** | **2 MINS** |

**SHOW ASSIGNED OAT CONCEPTS (#7&8) & COMPETITOR CONCEPTS (11-14) NOTED IN HIDCAT 1. SHOW 2 CONCEPTS ON THE SCREEN AT A TIME. ROTATE ORDER. DO NOT ALLOW THEM TO SWIPE FOR 5 SECONDS AFTER THE CONCEPT IS SHOWN**

**TRADE OFFS TO SHOW. ROTATE ORDER OF HOW SHOWN AND WHICH ONE SHOWN ABOVE EACH OTHER**

|  |  |
| --- | --- |
| 7. Australia’s Own Original Oat Milk | 11. Vitasoy Oat Milk |
| 7. Australia’s Own Original Oat Milk | 12. Oatly Oat Milk |
| 7. Australia’s Own Original Oat Milk | 13. So Good Oat Milk |
| 7. Australia’s Own Original Oat Milk | 14. Pure Harvest Oat Milk |
| 8. Australia’s Own Organic Oat Milk | 11. Vitasoy Oat Milk |
| 8. Australia’s Own Organic Oat Milk | 12. Oatly Oat Milk |
| 8. Australia’s Own Organic Oat Milk | 13. So Good Oat Milk |
| 8. Australia’s Own Organic Oat Milk | 14. Pure Harvest Oat Milk |

We’re now going to show the products again however we are going to ask you to let us know which one of these you prefer over the other, regardless of wether you found these appealing before or not.

On occasion, you will see the same product multiple times but we ask that you always please click on the one that you prefer out of the two.

Click Continue when you are ready to start.

|  |  |
| --- | --- |
| **SECTION D: DIAGNOSTICS** | **6 MINS** |

We are now going to ask you some more questions about 4 product ideas you have previously seen.

**SHOW THE 4 ASSIGNED CONCEPTS FROM HIDCAT1**

**BEFORE THE 2ND AND 3RD LOOPS SAY ON A NEW SCREEN:** We are now going to show you another product idea.

**BEFORE THE LAST LOOP SAY ON A NEW SCREEN:** We are now going to show you **one last product idea**.

**START OF LOOP**

**HOW D1 AND D2 ON SAME SCREEN**

**D1.** **VERBATIMS - LIKES**

Please tell us all the things that you particularly **like** about this product idea? *Please give as much detail on the case as possible.* **OPEN**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**D2.** **VERBATIMS - DISLIKES**

Please tell us all the things that you particularly **dislike** about this product idea? *Please give as much detail on the case as possible.* **OPEN**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**D3.** **DIFFERENTATION**

How **new and different** do you feel this product is to what you can already buy today? **SR**

*Please select one*

1. Very new and different
2. Quite new and different
3. Neither/nor new and different
4. Not very new and different
5. Not at all new and different

**D4.** **PURCHASE INTENT - UNPRICED**

How **likely would you be to buy** it if it was available where you usually shop, at a reasonable price? **SR**

*Please select one*

1. Definitely likely to buy
2. Quite likely to buy
3. Neither likely nor unlikely to buy
4. Quite unlikely to buy
5. Definitely unlikely to buy

**D5.** **EXCITEMENT**

How **exciting** do you find this product? **SR**

*Please select one*

1. Very exciting
2. Somewhat exciting
3. Neither exciting nor unexciting
4. Not very exciting
5. Not at all exciting

**D6.** **RELEVANCY**

How **relevant** do you find this product? **SR**

*Please select one*

1. Very relevant
2. Somewhat relevant
3. Neither relevant nor irrelevant
4. Not very relevant
5. Not at all relevant

**D7.** **BELIEVABILITY**

How **believable** do you find what you’ve been told about this product? **SR**

*Please select one*

1. Very believable
2. Somewhat believable
3. Not very believable
4. Not at all believable

**D8.** **FIT**

How well does this product **fit** with what you expect from Australia’s Own? **SR**

*Please select one*

1. It fits very well
2. It fits fairly well
3. It doesn’t fit at all

**D10.** **PURCHASE INTENT - PRICED**

So you previously mentioned you would be **[INSERT RESPONSE FROM D4]** this product idea. If this were priced at $**[INSERT PRICE FOR CONCEPT]** how likely would you be to buy it? **SR**

*Please select one*

1. Definitely likely to buy
2. Quite likely to buy
3. Neither likely nor unlikely to buy
4. Quite unlikely to buy
5. Definitely unlikely to buy

**ASK IF D10=1/2**

**D11.** **CONSUMPTION IMPACT**

Would you buy this product **instead of** or **in addition to** the other brands that you currently buy? *Please select one* **SR**

1. Buy **instead of** some of the brands I currently buy
2. Buy **in addition to** the brands I currently buy
3. Not sure

**ASK IF CODE 1 SELECTED AT D11**

**D12. BRANDS IMPACT**

Which **brands** would you buy this **instead of**? *Please select all that apply*

**SHOW BRANDS SPECIFIC TO CONCEPTS BELOW. ADD ‘NONE OF THESE’. MR, RANDOMISE. SHOW MAX 8 PER ROW ON SCREEN TO AVOID A LONG LIST.**

|  |
| --- |
| **CONCEPTS 1-8** |
| Australia's Own |
| Almond Breeze |
| ~~MILKLAB~~ |
| So Good |
| Vitasoy |
| Pure Harvest |
| Bonsoy |
| ~~Alpro~~ |
| ~~Liddells~~ |
| ~~Paul's~~ |
| Nutty Bruce |
| Oatly |
| Minor Figures |
| Califia Farms |
| ~~Alternative Dairy~~ |
| Happy Happy Soy Boy |
| Coles |
| Woolworths Select |
| Macro |
| ~~Suncoast~~ |
| ~~Living Planet~~ |
| ~~Inside Out~~ |
| Other (please specify) |

|  |
| --- |
| **CONCEPTS: 9-10** |
| Dairy Farmers |
| Farmers Own |
| A2 Dairy Milk |
| Farmhouse Gold |
| Paul's Farmhouse |
| Norco |
| Macro |
| Liddell's |
| Woolworths |
| Coles |
| Farmdale |
| Devondale |
| Other (please specify) |

**END OF LOOP**

|  |  |
| --- | --- |
| **SECTION E: ORGANIC EVALUATION** | **4 MINS** |

**INTRO** We would now like to ask you a few further questions about organic products.

**E3. ORGANIC COMPREHENSION**

How well would you say you **understand** what each of these statements means? **SR PER ROW. ROTATE**

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Don’t understand it at all** | **Understand it a little** | **Understand it a lot** |
| Organic | 1 | 2 | 3 |
| Certified organic | 2 | 2 | 3 |

**ASK IF E3\_1=2 OR 3**

**E2a.** **DEFINITION OF ORGANIC**

What does the the term organic mean to you? **OE TEXT BOX**

**ASK IF E3\_2=2 OR 3**

**E2b.** **DEFINITION OF CERTIFIED ORGANIC**

What does the the term certified organic mean to you? **OE TEXT BOX**

**ASK ALL**

**E3a. DIFFERENCE BETWEEN ORGANIC AND CERTIFIED ORGANIC**

Do you think there is a difference between a product being **organic** and being **certified organic**?

1. Yes
2. No

**ASK IF E3a=1**

**E3b. DIFFERENCE BETWEEN ORGANIC AND CERTIFIED ORGANIC**

What would you say is the difference between products that are **organic** and those that are **certified organic**? **OE TEXT BOX**

**E4a. BUYING ORGANIC**

How often do you buy products that are organic? **SR**

1. All the time
2. Frequently
3. Occasionally
4. Rarely
5. Never

**ASK IF E4a=1-3**

**E4b. TYPES OF ORGANIC PRODUCTS**

Which of the following products do you buy that are organic? *Please select all that apply* **MR. ROTATE**

1. Vegetables
2. Fruit
3. Dairy milk
4. Plant based milk
5. Yoghurt
6. Tea/coffee
7. Meat
8. Eggs
9. Tinned products
10. Toddler/baby formula
11. Pasta/rice
12. Other **ANCHOR**

**ASK ALL**

**E4c.** **IMPACT OF CERTIFICATION**

If a brand of plant based milk was certified organic, would this impact your likelihood to purchase it?

1. I would be a **lot more likely** to purchase the brand ~~making this claim~~
2. I would be a **little more likely** to purchase the brand ~~making this claim~~
3. It **wouldn’t change** which brand I would purchase
4. I would be a **little less likely** to purchase the brand ~~making this claim~~
5. I would be a **lot less likely** to purchase the brand ~~making this claim~~

|  |  |
| --- | --- |
| **SECTION Z: DEMOGRAPHICS** |  |

**INTRO** Just a few final questions.

**Z1.** **EMPLOYMENT**

Which of the following best describes your current employment status? **SR**

1. Employed full time
2. Employed part time/casual
3. Self-employed
4. Not employed, but looking for work
5. Not employed, and not looking for work
6. Retired
7. A student / training
8. A homemaker

**Z2. EMPLOYMENT ROLE**

**SHOW IF Z1 = 1/2/3**: Which of the following best describes **your occupation**?

**SHOW IF Z1 = 4/5:** Which of the following best describes the type of **occupation you are qualified for**?

**SHOW IF Z1 = 6:** Which of the following best describes your **occupation** **before you retired**?

**SHOW IF Z1 = 7:** Which of the following best describes what you **are studying/training to become**?

**SHOW IF Z1 = 8:** Which of the following best describes the **occupation of the main income earner in your household**?

**SR**

1. Office-based executive – professional, managerial or other executive
2. Non-managerial office, sales or service worker (e.g. personal assistant, clerical, retail sales, etc.)
3. Highly skilled professionals (e.g. doctor, dentist, engineer, etc.)
4. Other skilled professionals (e.g. teacher, nurse, police officer, fire fighter, etc.)
5. Highly skilled tradespersons (e.g. builder, plumber, electrician, mechanic, etc.)
6. Other skilled or semi-skilled tradespersons (e.g. hairdresser, printer, florist, etc.)
7. Plant or machine operator, driver or other transport worker
8. General labourer or manual worker
9. Other (please specify) **[ANCHOR]**

**Z2a. HIDDEN QUESTION – EMPLOYMENT TYPE**

1. White collar – IF Z3 =1, 3
2. Grey collar – IF Z3 = 2, 4
3. Blue collar – IF Z3 = 5, 6, 7, 8

**Z3. HOUSEHOLD INCOME**

Which of the following ranges best describes your **total yearly household income before tax**? **SR**

*If you are living in a shared household or boarding, please state your personal income only*

1. Under $15,000
2. $15,000 - $24,999
3. $25,000 - $34,999
4. $35,000 - $49,999
5. $50,000 - $74,999
6. $75,000 - $99,999
7. $100,000 - $149,999
8. $150,000 or more
9. Prefer not to say

**Z3**. **ETHNICITY**

Which ethic group(s) do you belong to? **MR**

1. Australian European
2. Aboriginal / Torres Strait Islands
3. New Zealand European
4. Polynesian / Pacific Island / Maori
5. Chinese
6. Taiwanese
7. Japanese
8. Korean
9. South East Asian
10. Asian – Other
11. Indian
12. West European
13. Eastern European
14. North African and Middle Eastern
15. South American
16. North American
17. Sub-Saharan African
18. Other (please specify)
19. Prefer not to answer

**Z4. NEW PRODUCT ATTITUDE**

How much do you agree or disagreww with the following statements? **SR PER ROW**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Strongly agree | Somewhat agree | Neither agree nor disagree | Somewhat agree | Strongly disagree |
| 1 | 2 | 3 | 4 | 5 |

1. When I find a new product I really like I have to tell others all about it
2. The brands I choose are important to me as I believe they say a lot about me
3. I love searching out new products

ASK ALL

**QC3** Finally, to ensure all answers provided in this survey are as accurate as possible, we would like to confirm the following details about you. Please select **true or false** for each question below noting that some details may be incorrect. **ROTATE, SR PER ROW. PIPE IN THE DEMOS (AGE AND GENDER) IN GREEN, BOLD TEXT.**

|  |  |  |  |
| --- | --- | --- | --- |
|  |  | Yes | No |
| 1 | You’re [INSERT GENDER NOT SELECTED FROM S3] | 1 | 2 |
| 2 | You’re [INSERT AGE FROM S2] | 1 | 2 |

**A RESPONDENT HAS TO GET ALL CORRECT TO QUALIFY AS A COMPLETE, CORRECT IS MARKED IN GREEN. IF NOT CORRECT, REMOVE FROM DATAFILE**