

# Unlocking Export Prosperity: Latest international consumer surveys

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# The AERU exercises leadership in research for sustainable wellbeing.

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## Featured



### Consumer Insights: AERU Data Portal

Gain insights into what consumers in New Zealand's key export markets want via the AERU Data Portal.



### Increasing Value For New Zealand Exports

A major focus of AERU research is ensuring that New Zealand's agricultural exports receive a market premium, with the gains passed back to our producers.



### Wellbeing Economics

The AERU's work on wellbeing economics sets out a framework to address fundamental issues affecting wellbeing outcomes.

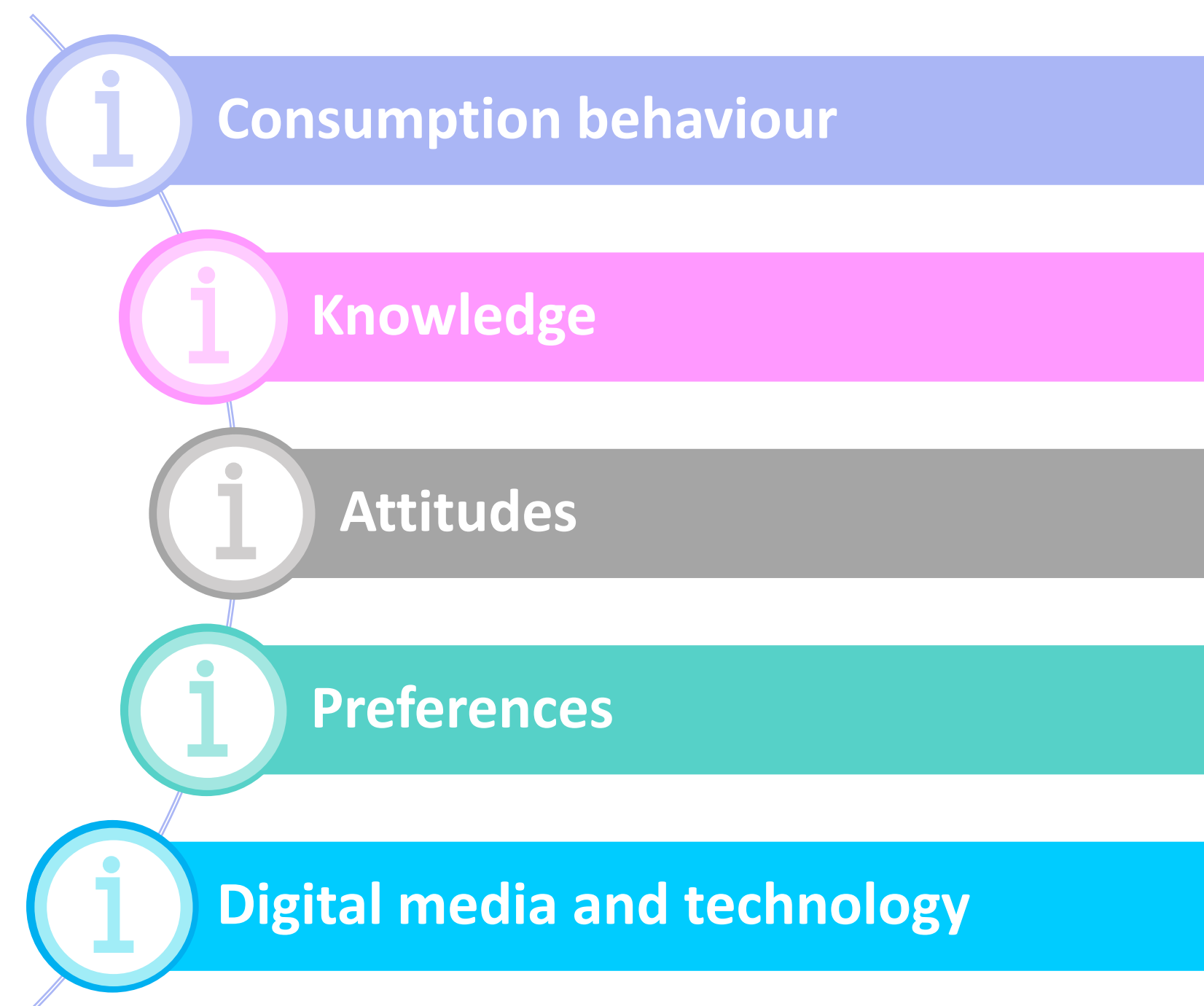


### Climate Change

Climate change creates risks and opportunities for New Zealand producers. Our research explores the issues, with a strong focus on adaptation to the new environment.



Consumer insights for NZ  
food and beverage  
products with  
credence attributes  
distinctively NZ



# UHT milk consumers



Online survey  
panel

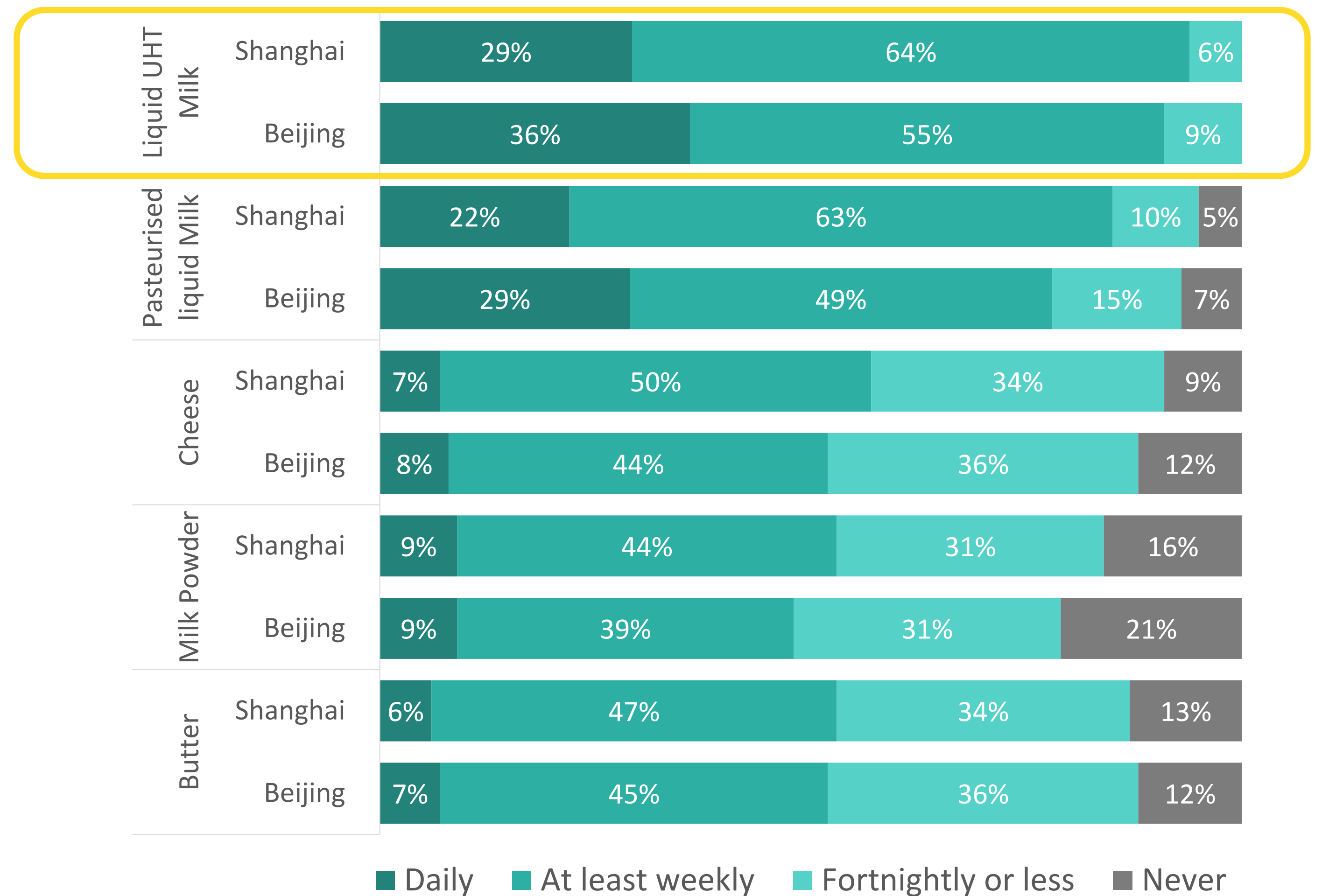
At least monthly  
purchases of UHT  
milk

Demographics consistent  
across all three surveys:

- ↑30 to 40-year-olds
- ↑Couples with children
- ↑University degree

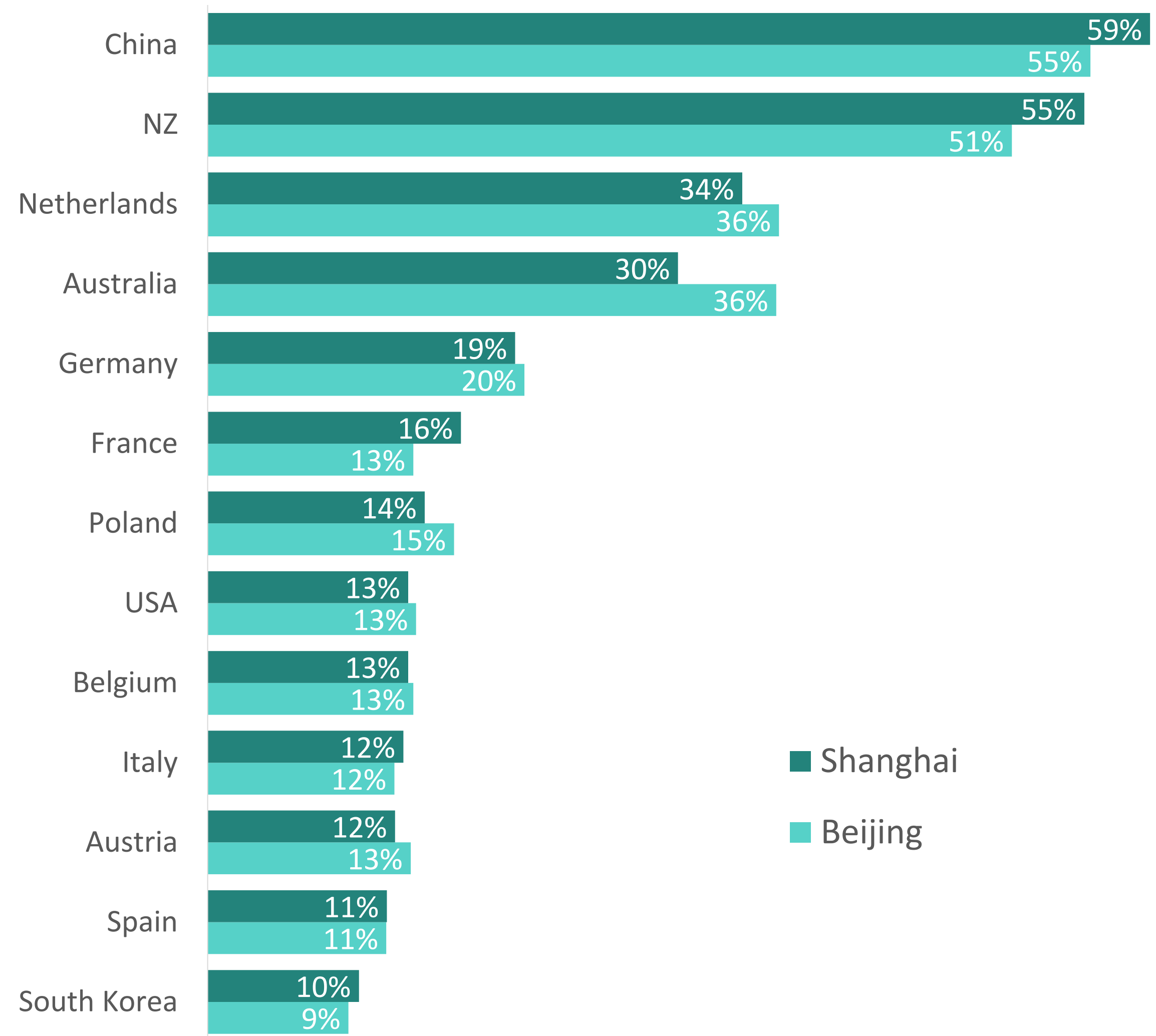
## Which dairy products do you consume?

- Higher daily milk consumption rates in Beijing
- Similar overall pattern of consumption between cities
- Consistent with 2019 survey



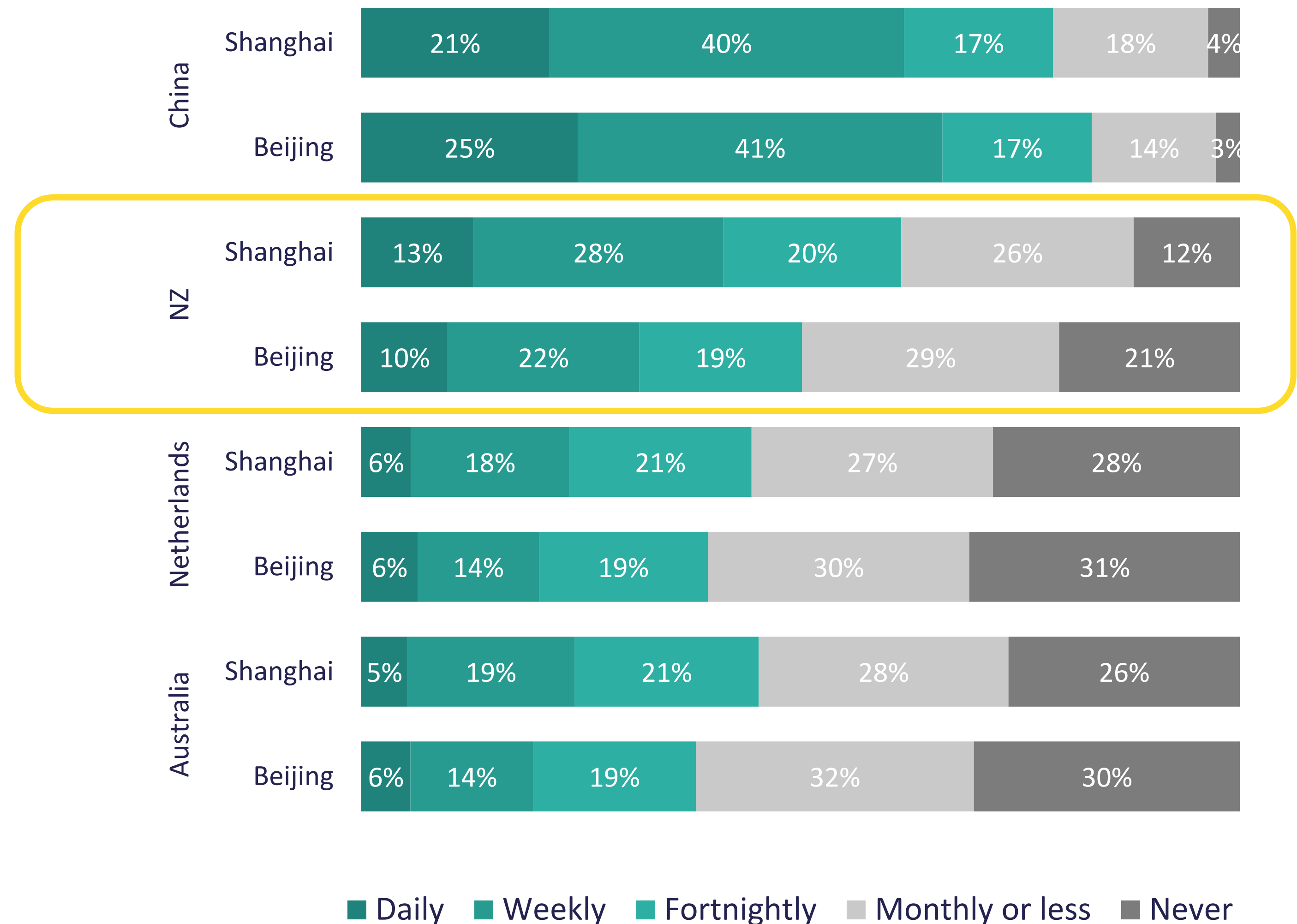
## Which countries make the highest quality UHT milk?

- Ranking almost identical across the two cities
- NZ ranking same as for 2019 survey



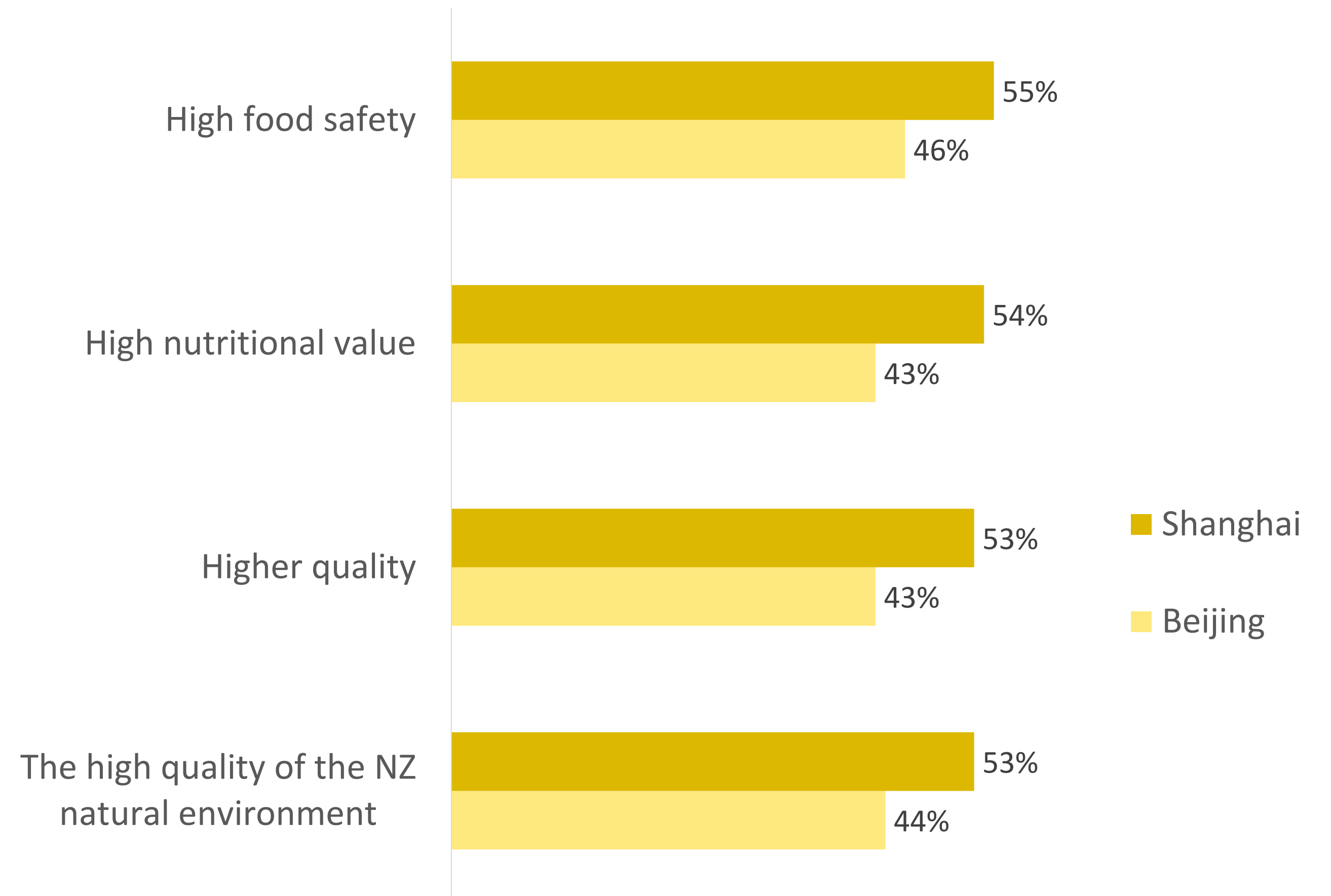
# Which countries do you buy UHT milk from?

- Ranking is consistent between cities
- Same ranking of top four as in 2019
- Moderate increase from 2019 survey
  - Daily (12%)
  - Weekly (28%)



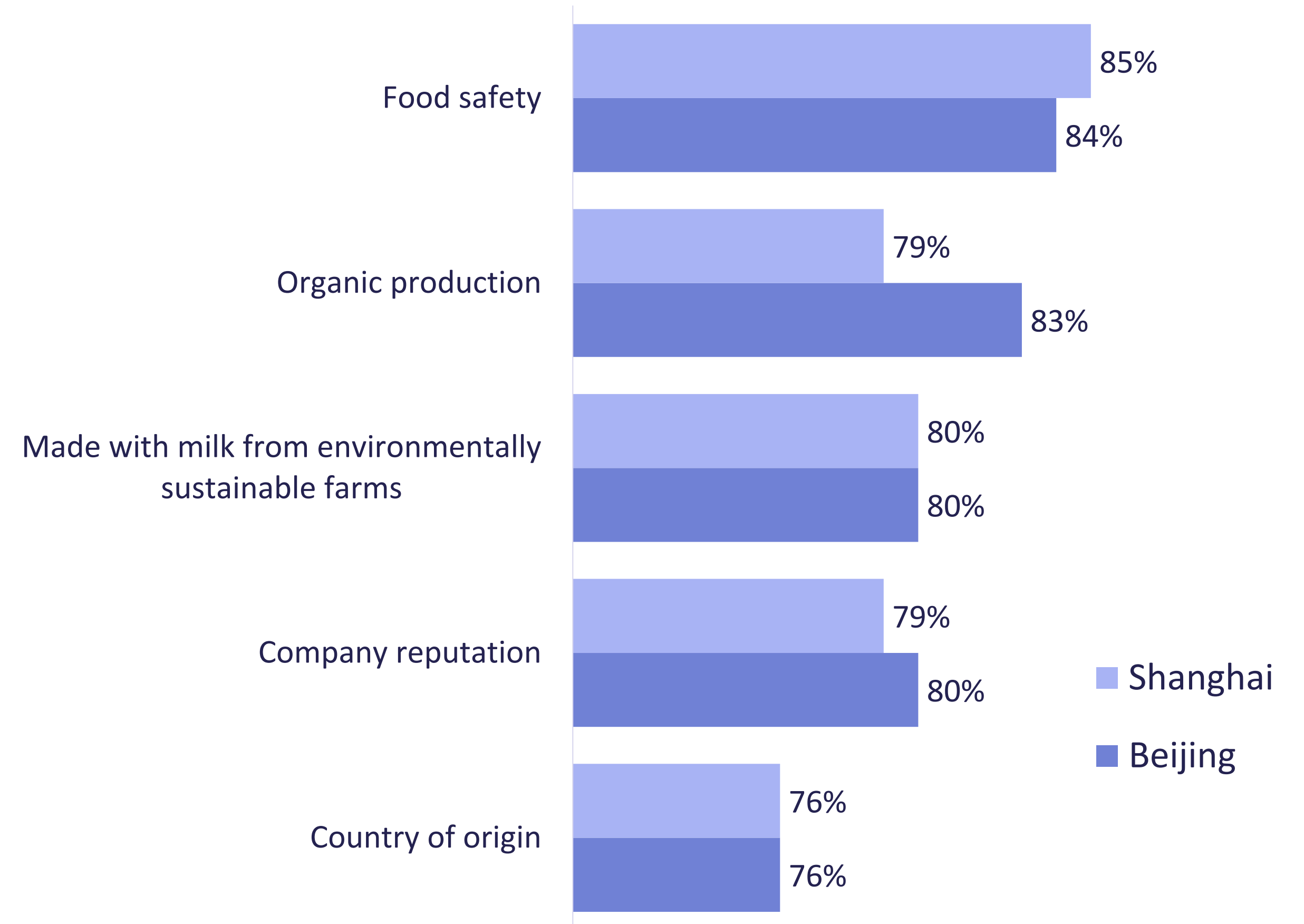
# Why buy NZ milk?

- Top four reasons were the same between cities
- Consistent with 2019 Beijing survey
- Food safety an important factor for high nutritional value in both cities
- Environmental quality important driver of food safety, and quality in both cities
- Environmental quality in top three characteristics of ideal UHT milk



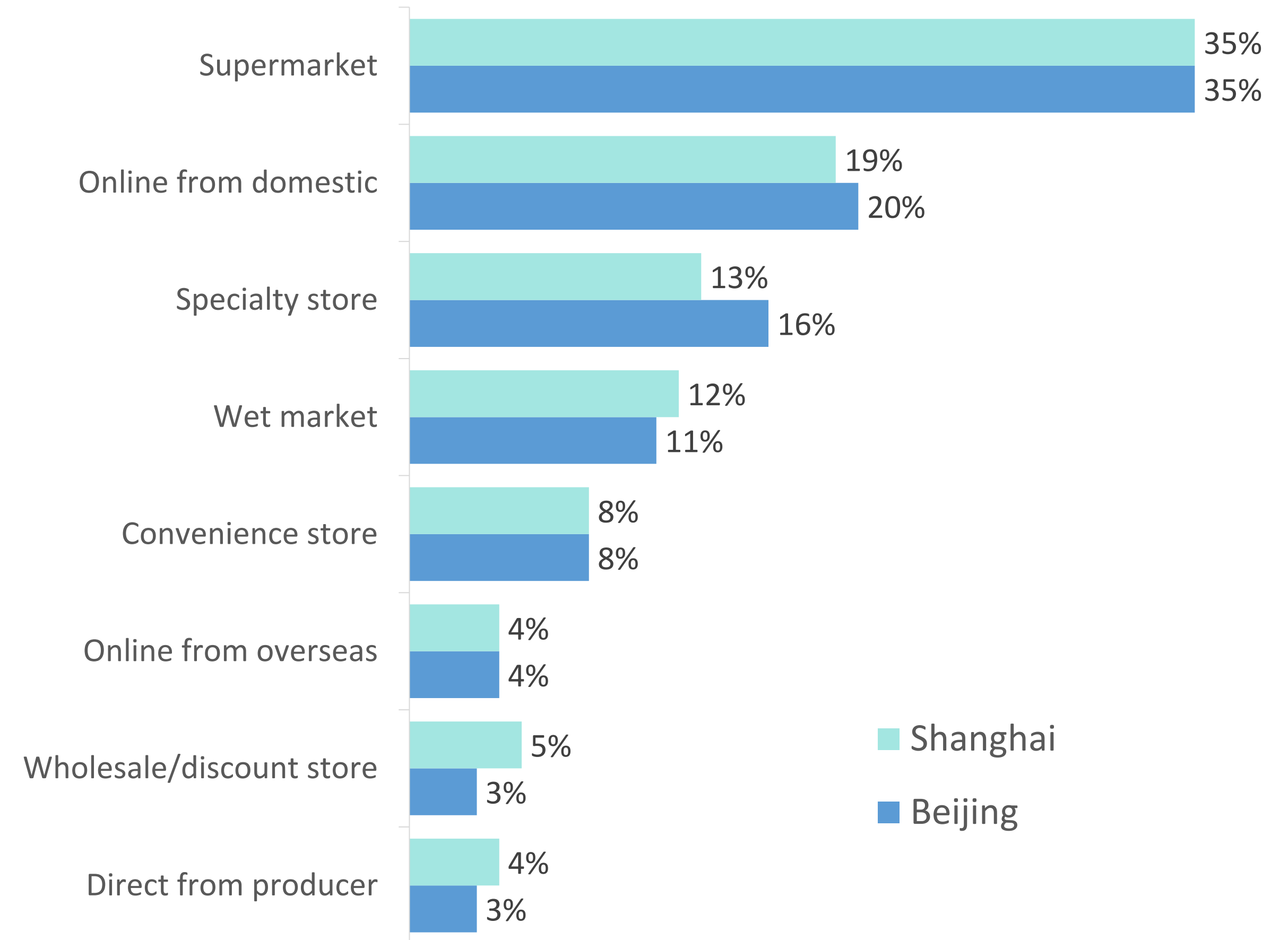
# What factors drive high quality milk?

- Top five Main factors consistent across both cities
- Consistent with Beijing 2019 survey



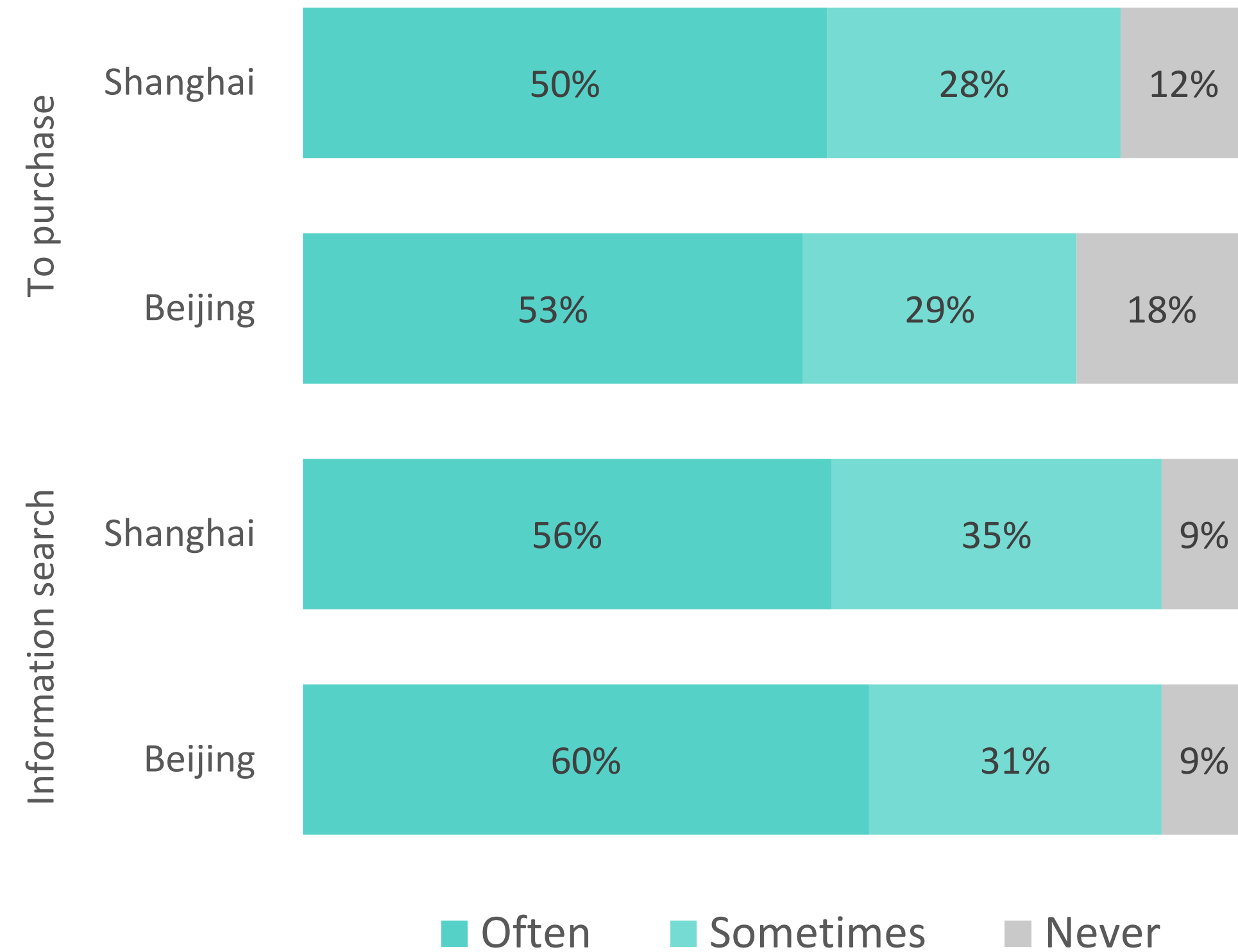
## Where do you buy UHT?

- Overall similar pattern of expenditure between cities
- Consistent with 2019 Beijing survey
- Seven out of ten consumers bought milk online
- A quarter of consumers make 30% of their milk expenditure online



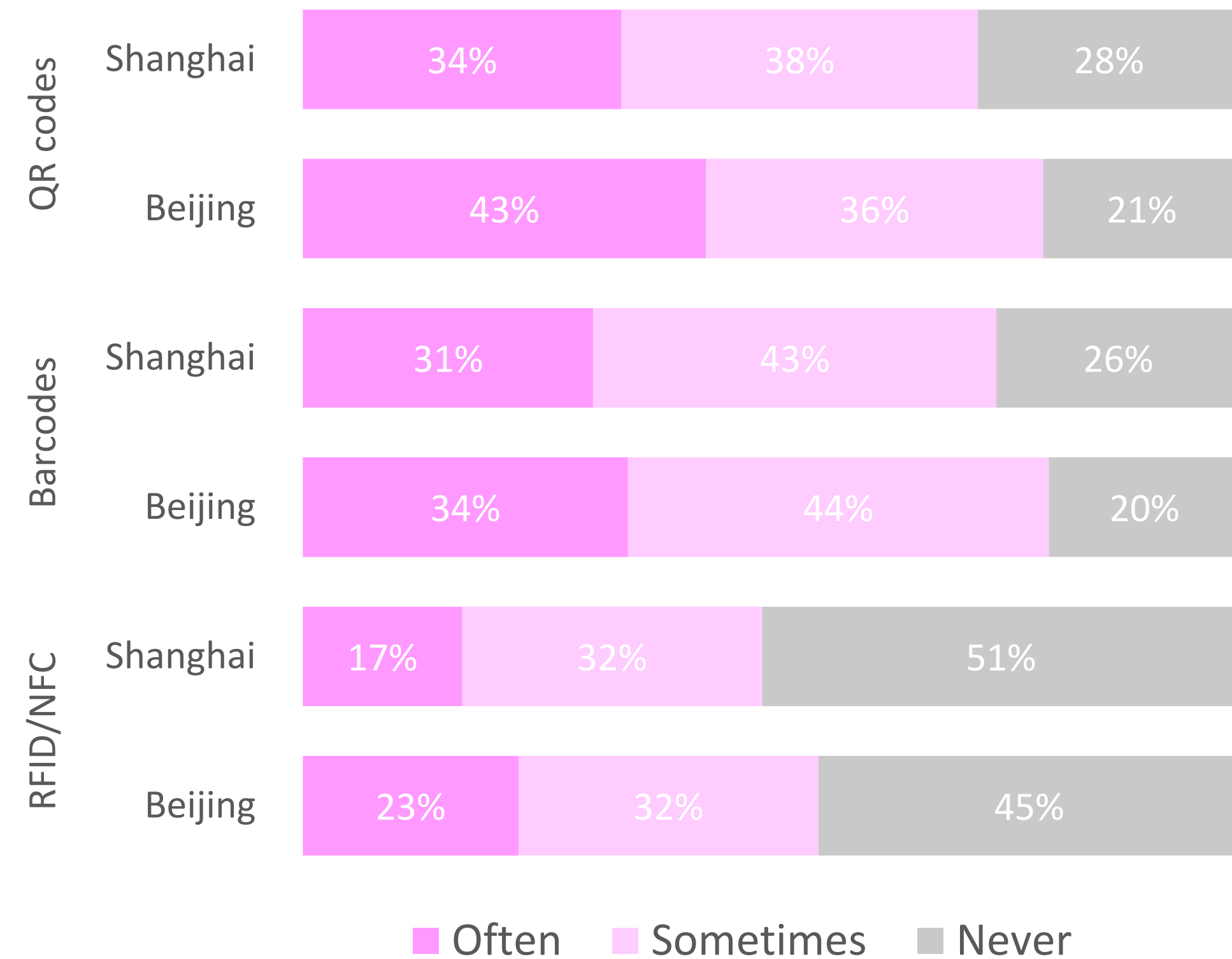
## Do you use a mobile device for milk purchasing or information seeking

- Similar pattern of tech use between cities
- Moderate increases over the 2019 Beijing survey



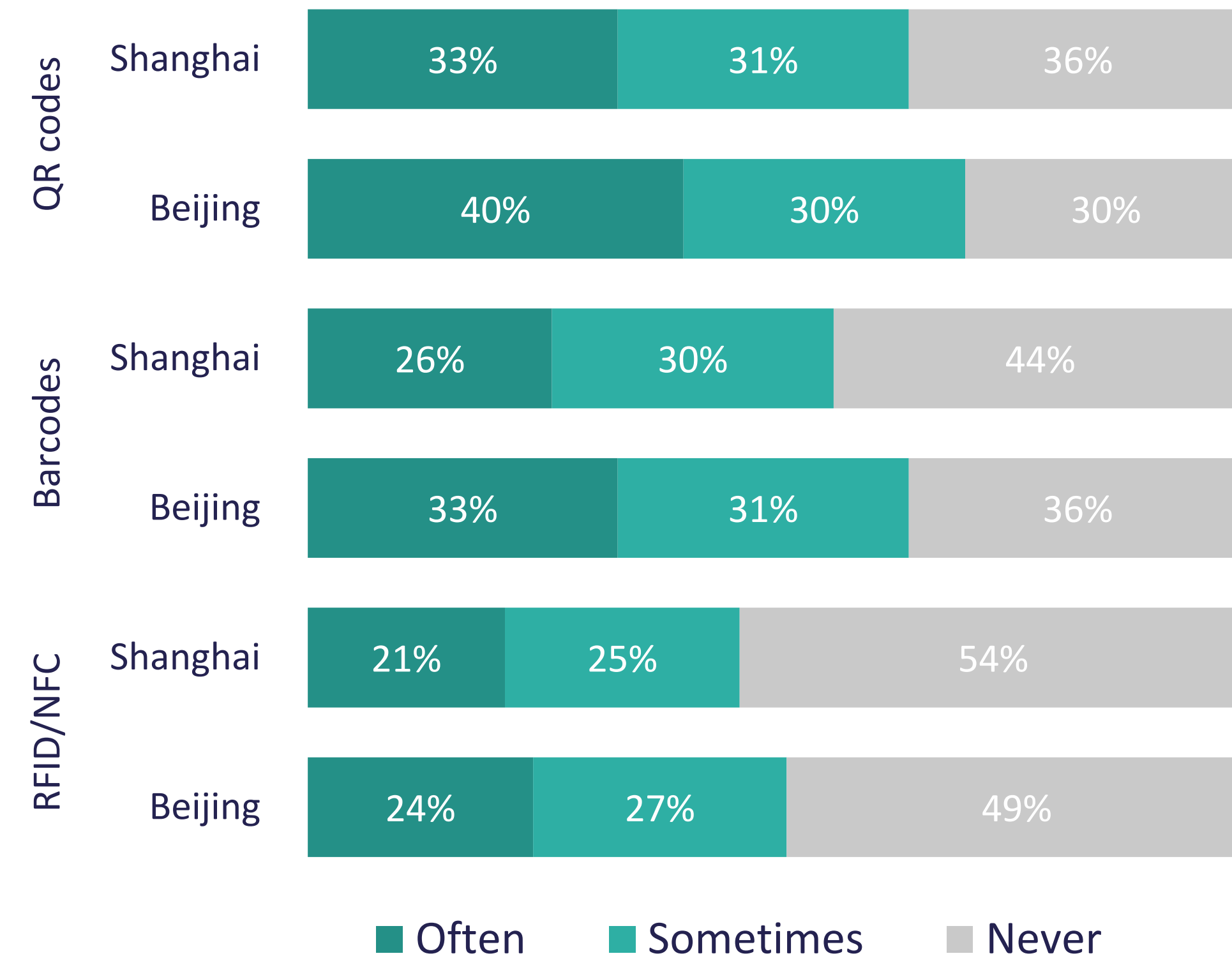
## Do you use mobile technology to find milk information?

- Beijing has moderately higher tech use
- Overall similar pattern of use between cities
- Significant increase since 2019 Beijing survey



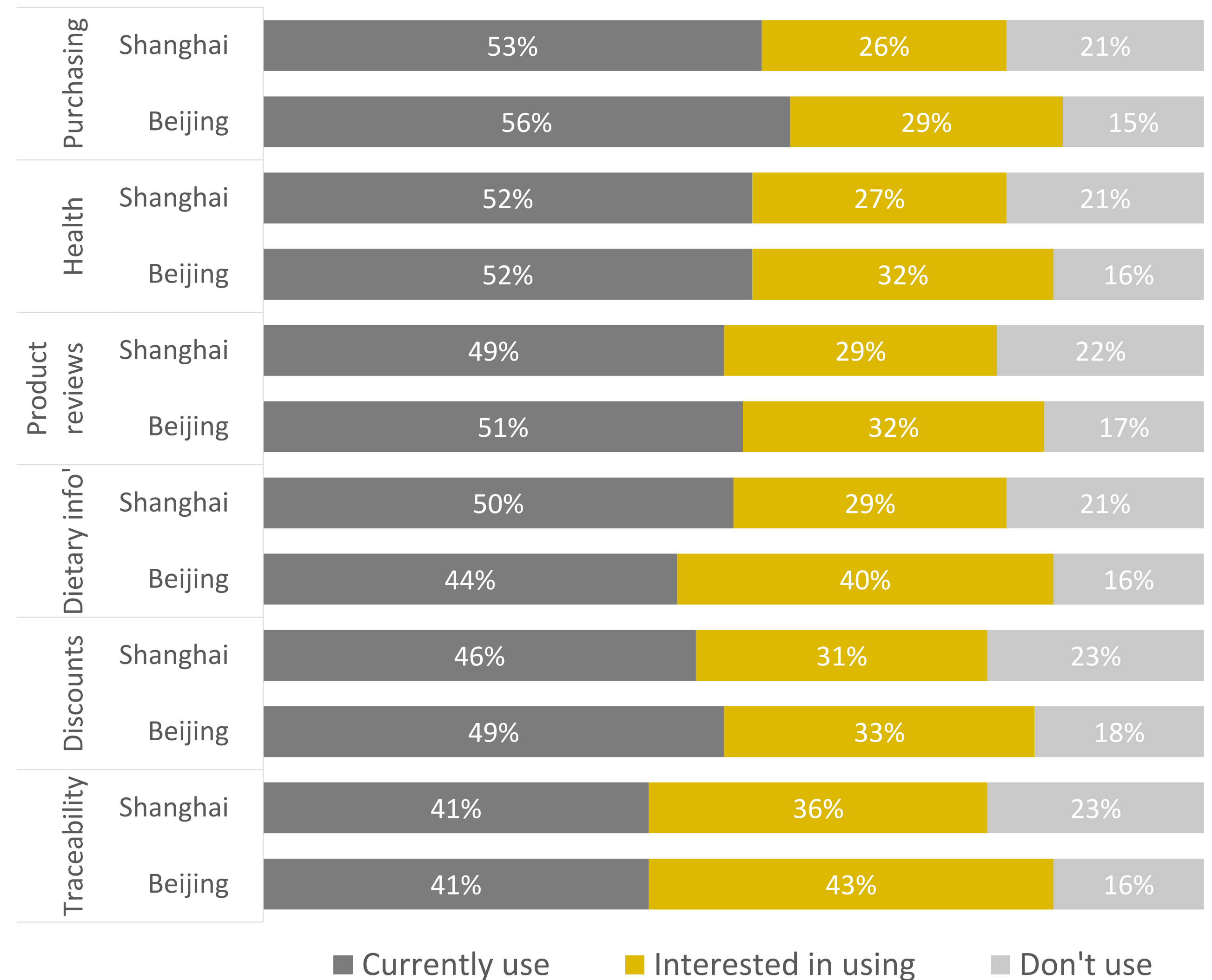
# Do you use mobile technology to purchase milk?

- Beijing has moderately higher tech use
- Overall similar pattern of use between cities
- Moderately lower use than for information seeking
- Significant increase since 2019 Beijing survey



## Do you use mobile app's related to milk?

- Overall similar pattern of use between cities
- Same top six app uses across the two cities
- Moderate increase since 2019 Beijing survey
- Health and dietary app's use linked to rise in consumers who are driven by health credentials
- Traceability linked to increasing importance of supply chain transparency



**Discrete Choice Experiment  
New Zealand UHT Milk  
Shanghai & Beijing Consumers  
2021**



# Latent Class Modelling of Consumer Preferences

1. Identify segments of consumers with differing milk attribute preferences
2. Estimate willingness-to-pay for attributes across consumer segments
3. Describe profiles for different consumer segments

## UHT milk attributes

Price ¥ per 250ml	2.5, 4.5, 6		
Enhanced Animal Welfare	Certified		
Organic	Certified		
Enhanced Nutrition	Increased Protein	Increased Calcium	
Animal Housing	100% Pasture Raised	Feed-lot	
Animal Feed	100% Grass-fed	Grain	
Social Responsibility	Care for workers	Contribute to local communities	Support for farmers
Environmental Sustainability	Carbon Neutral	Biodiversity Enhancement	Water Quality Protection

# UHT milk choice sets

**Set 1 of 10** Please imagine you are purchasing a 250ml carton or bag of UHT milk from your usual retailer for usual consumption. Given the information that is provided, **which of the following milk products would you prefer?**

Mark your choice using the buttons below, and please bear in mind the price that is associated with your choice and how that would fit into your budget.

[More Info](#)

	Option A	Option B	
Price per 250ml carton/bag of UHT milk	4.5元	2.5元	
Animal Feed	100% Grass-fed	100% Grass-fed	
Environmental Sustainability	Biodiversity Enhancement	Carbon Neutral	
Animal Housing		Feed-lot Raised	
Nutrition	Increased protein	Increased protein	
Organic	Certified		
Enhanced Animal Welfare		Certified	
Social Responsibility	Care for workers	Contribute to local communities	
Selection:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> I would not buy UHT milk

# 1. Broad Considerations

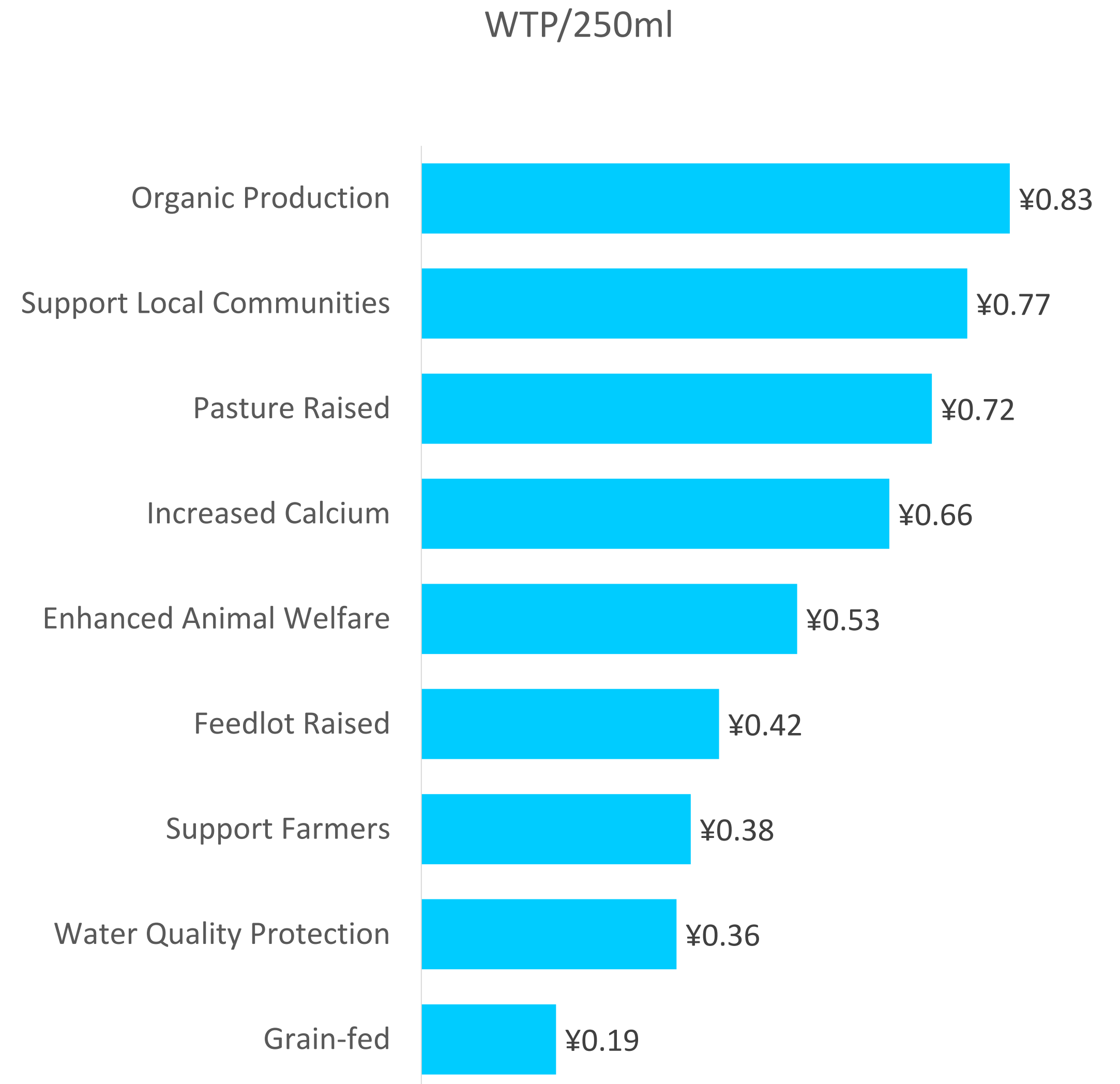
49% of surveyed consumers

These consumers consider the broadest range of attributes in their choices of the three segments

Over the three segments, they don't have the highest WTP for any attribute.

Consumers in this group are more likely to:

- have a higher level of education
- rank NZ milk quality high
- have higher purchase frequency
- try to lead a healthy lifestyle



## 2. Socially Responsible

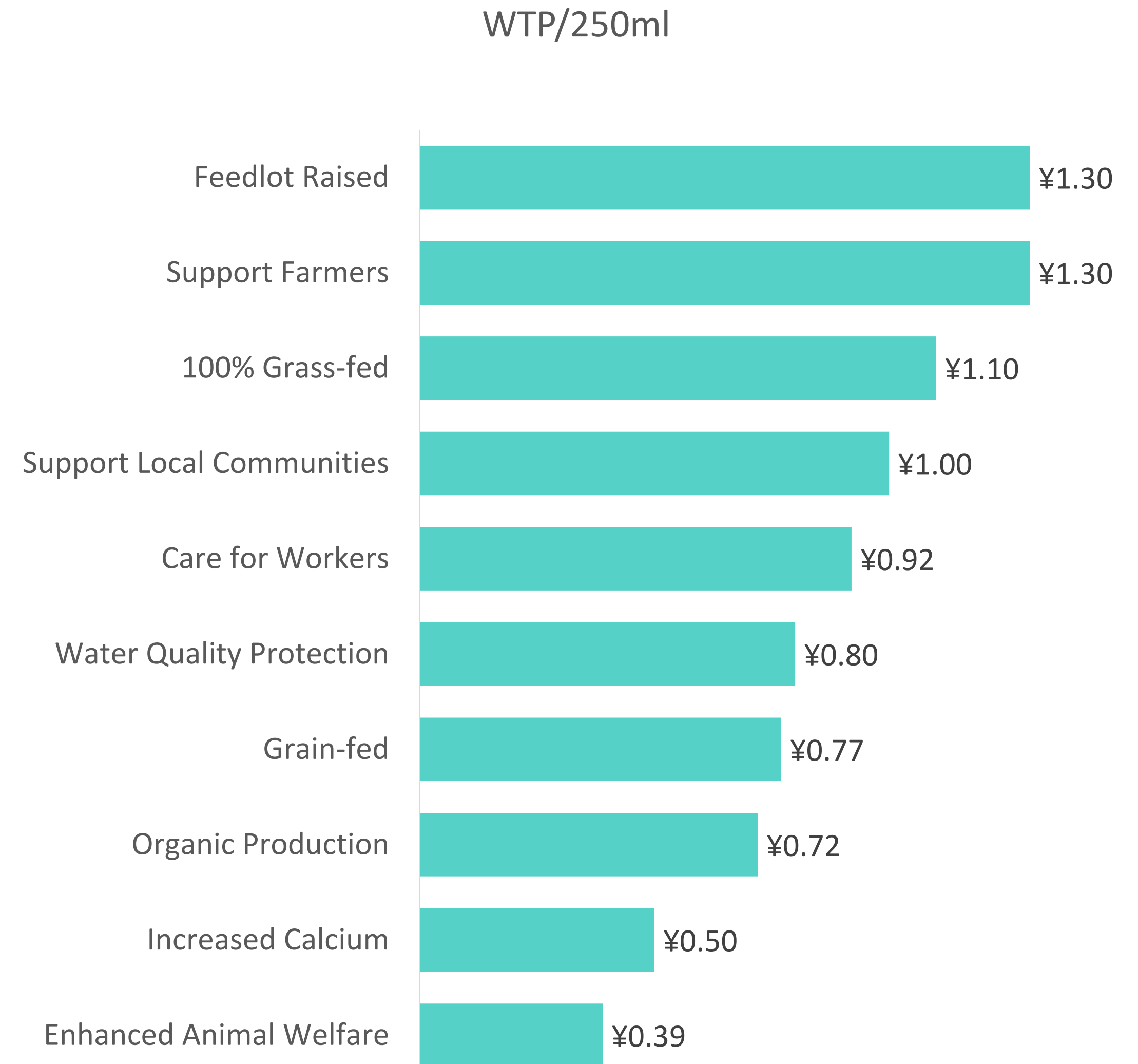
15% of surveyed consumers

These consumers have the strongest preferences for Social Responsibility attributes of the three groups.

They are the only group to value a 100% Grass-fed claim.

Consumers in this group are more likely to:

- be male
- from Beijing
- have higher NZ milk purchase frequency
- have lower purchase frequency



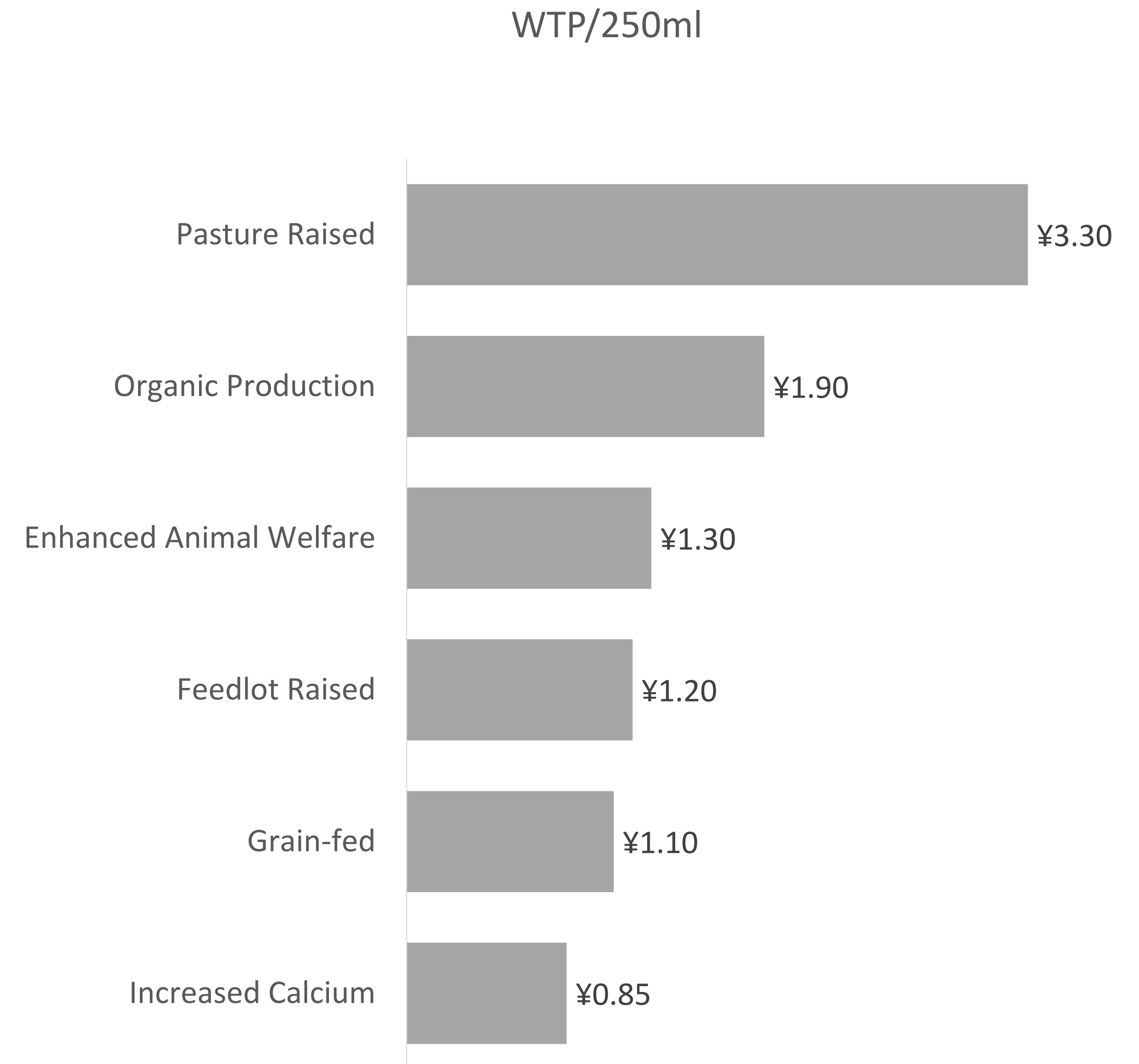
### 3. Pasture Preferred

36% of surveyed consumers

While these consumers have the smallest set of preferred attributes, they have the strongest preferences for Pasture Raised, Organic, and Animal Welfare of the three groups.

Consumers in this group are more likely to:

- be concerned about effects of pesticides and additives in production
- consider pasture raised to be associated with high quality milk, and high nutritional value
- have higher usual spend on 250ml UHT



# Initial findings of the Choice Experiment

## Appeals to all consumers to a greater or lesser extent

- Organic
- Increased calcium claim
- Enhanced animal welfare
- Water quality protection
- Social responsibility claims

## Strongly favoured by a particular consumer segment

- 100% pasture raised

## Support not found

- Increased protein claim
- Carbon claims
- Biodiversity claims

