# Raw Drinking Milk Consumer Research

Final Report for

February 2018

## Contents

# 1. Executive summary

- Understanding of the term 'raw milk' remains high, with 8 out of 10 consumers able to correctly identify what the term means when prompted – an identical finding to that from 2012.
- Awareness of consumption of raw drinking milk (RDM) has grown since 2012, with nearly 2 in 3 consumers 64%) now being aware that some people choose to consume RDM compared to 55% in 2012.
  - At the same time, the proportion of consumers who have heard anything recently about RDM is also higher (3% in 2012, 12% in 2018) with television being the dominant channel for hearing such information.
- The proportion of consumers who have ever tasted or bought RDM has remained similar to 2012 with almost a third (32%) of all consumers ever having done so.
  - Men are more likely than women to have tried or bought RDM
  - 25-44 year olds are the most likely age group to have bought RDM
- The proportion of the population currently consuming RDM has increased from 3% of the population in 2012, to 10% of the population in 2018.
  - Current consumers are more likely to be under 45 years old; from within the ABC1 socio-economic group and from England.
  - Current consumers are likely to have started consuming quite recently – within the last year – and consumption is more frequent than was seen in 2012.
  - Current consumers also report that they are consuming more RDM than they did 12 months ago.
  - The main reason for consumption is the belief that RDM has a higher nutritional content than conventional milk.
  - In total, 11% of the sample reported that a child or children under 18 consumes RDM products.
  - Health concerns around the safety of consuming RDM is the main reason for choosing not to consume it.
- Levels of interest in future consumption of raw milk or cream are broadly consistent with the findings from 2012 with a small upward shift in the per cent of those interested or very interested from 19% in 2012, to 24% in 2018.
- A greater proportion (41%) of consumers believe the Government protecting public health in relation to RDM is important, compared to the 23% who err towards freedom of choice for consumers. When comparing the 2018 results to the 2012 survey, this represents a slight shift towards Government protection.

# 2. Introduction

## 2.1 Background

The FSA permits the restricted sale of Raw Drinking Milk (RDM) in England, Wales and Northern Ireland. In July 2015, following a policy review, the FSA board agreed with recommendations to continue with existing controls on the production, sale and consumption of raw milk against a back-drop of relatively low numbers of producers, low volume of sales and minimal incidents with the product. The evidence review comprised a wide range of consumer research which was one element of the evidence used to underpin the recommendations to the FSA Board. Part of this evidence were the findings from an online survey conducted in 2012 with 1,333 adults across England, Northern Ireland and Wales to understand more about consumption of and attitudes to Raw Drinking Milk (RDM).

However, since the review in 2015 the numbers of producers and incidents have significantly increased. The FSA therefore decided to evaluate the controls to see if the risk to consumers has increased in light of the changes to the RDM market.

As part of the evidence review the FSA commissioned further consumer research to investigate if there are changes in perceptions or behaviour since the last RDM Policy Review. This new research will update the evidence base which will then feed into a decision paper on RDM policy going to the FSA Board.

## 2.2 Research objectives & methodology

In 2018 the FSA commissioned Community Research and 2CV to conduct a slightly adapted version of the 2012 consumer survey. Matching the methodology of the 2012 survey, a nationally representative sample of adults across England, Northern Ireland and Wales completed an online survey to see how and if attitudes and behaviour have changed since 2012.

## 2.3 Sample and questionnaire

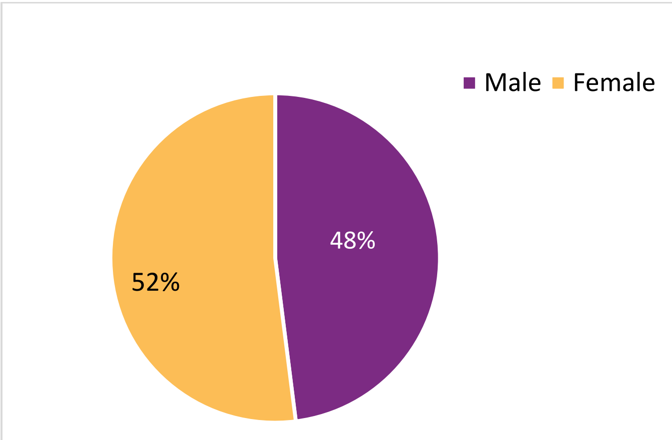
The survey was conducted among a nationally representative sample of 1,323 individuals (across England, Northern Ireland and Wales, as per the 2012 study). The results of the study are weighted to reflect the size and shape of the UK population (exc. Scotland as this was not part of this study.) Because we needed to have robust numbers in Wales and Northern Ireland we boosted the sample size in the study to 204 people in Wales and 202 in Northern Ireland and then down-weighted their size to reflect the true proportions (based on the latest ONS population data). The figures quoted in the tables and charts in this report are percentages unless otherwise stated. Base sizes on which percentages are calculated are provided at the bottom of the chart or table and are unweighted. Percentages may not sum to 100% in all instances on account of rounding or where multiple responses were allowable.

The questionnaire was broadly consistent with the one used in 2012 although some questions were removed (particularly those about product labelling). List based questions were neither randomised nor rotated, as it is believed that this was also the approach in 2012.

Participants were screened to ensure that only consumers of milk or cream were included in the sample.

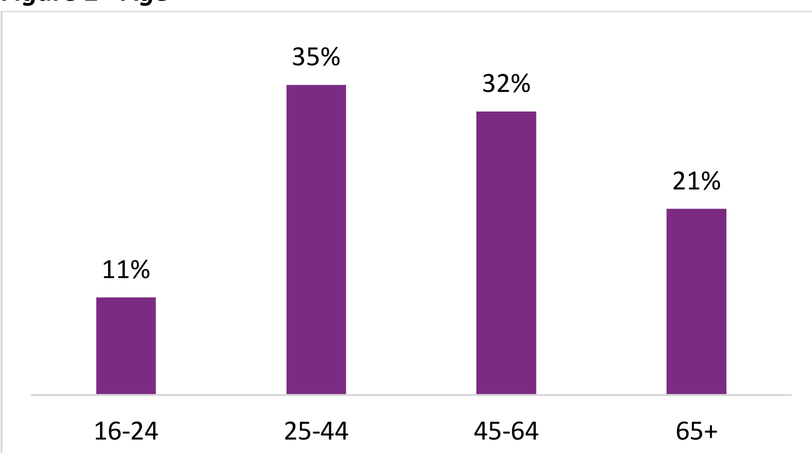
Figures 1, 2 and 3 show the demographic characteristics of the unweighted sample.

***Figure 1 - Gender***



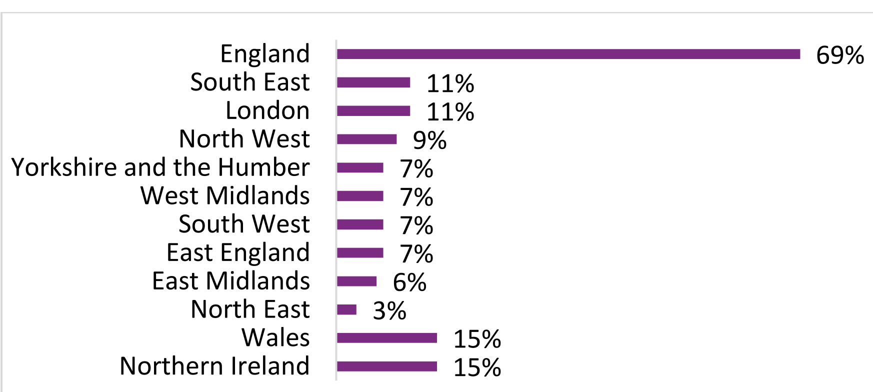

Q100: Are you? Base: All respondents (1,323) unweighted data

***Figure 2 - Age***




Q105: In what year were you born? Base: All respondents (1,323)

***Figure 3 – Country and Region***




Q115: In what region do you currently reside? Base: All respondents (1,323) unweighted data

# 3. Main findings

## 3.1 Understanding and awareness of RDM

Figure 4 shows that when asked “what do you understand by the term 'raw milk’?” four in ten (42%) consumers spontaneously described RDM as ‘unpasteurised’, whilst 1 in 4 (27%) struggled to provide an answer.

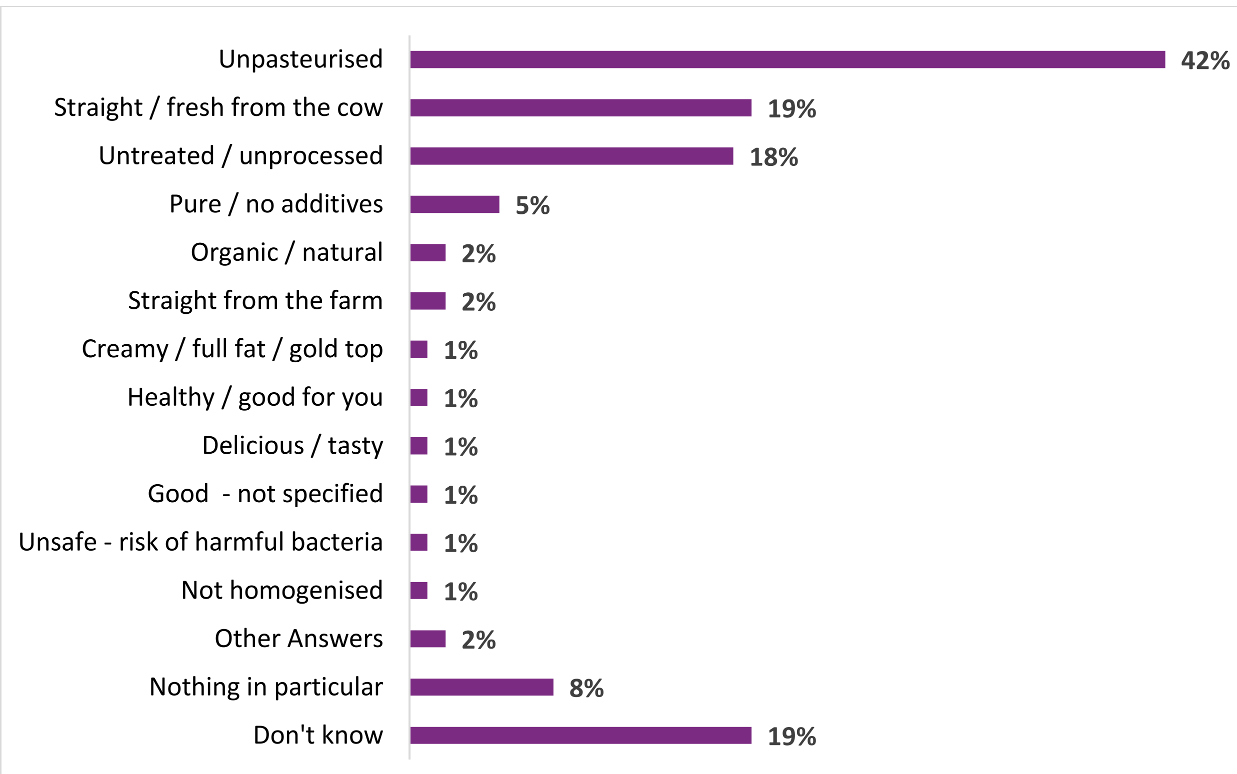
*“It is milk that hasn’t been pasteurised and processed. It’s straight from the cow”*

*“Milk in its natural state, without anything extra added to it or anything being removed”*

*“I have no idea, but I think it probably means milk which hasn’t been treated or had anything added to it”*

The report from 2012 did not include a breakdown of the coded unprompted responses from respondents so a direct comparison of findings cannot be made. However, the 2012 report did state that 30% of consumers struggled to provide an answer unprompted – a broadly similar finding to that from 2018.

***Figure 4 – Unprompted understanding of raw milk***




Q310: What do you understand by the term 'raw milk’? Please provide as much detail as you can. Base: all respondents (1,323)

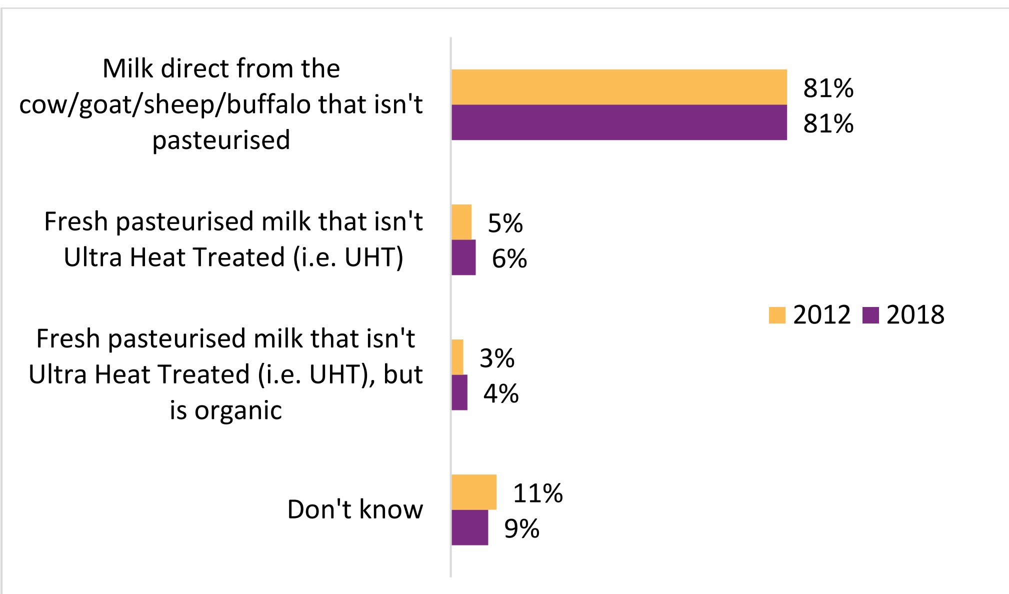
Analysis by sub group shows that older consumers, higher socio-economic groups and consumers in Northern Ireland demonstrated a better spontaneous understanding of the term 'raw milk' than those in younger age groups, lower socio-economic groups and those in England and Wales.

| | Age | | | | SEG | | Country | | |
|---|---|---|---|---|---|---|---|---|---|
| | 16-24 | 25-44 | 45-64 | 65+ | ABC1 | C2DE | England | Wales | N. Ireland |
| Base | 146 | 472 | 431 | 274 | 719 | 604 | 917 | 204 | 202 |
| Spontaneously said 'unpasteurised' | 25% | 35% | 47% | **57%** | **47%** | 37% | 41% | 44% | **61%** |
| Responded 'Don't know' | 19% | 22% | 22% | **8%** | **15%** | 24% | 19% | 20% | **10%** |

Q310: What do you understand by the term 'raw milk'? Please provide as much detail as you can. Base: all respondents (1,323)

Prompted understanding of what the term RDM means has remained stable since 2012, with 4 out of 5 consumers (81%) correctly able to identify RDM as 'milk direct from the cow/goat/sheep/buffalo that isn't pasteurised', this is an identical result to 2012, as Figure 5 shows.

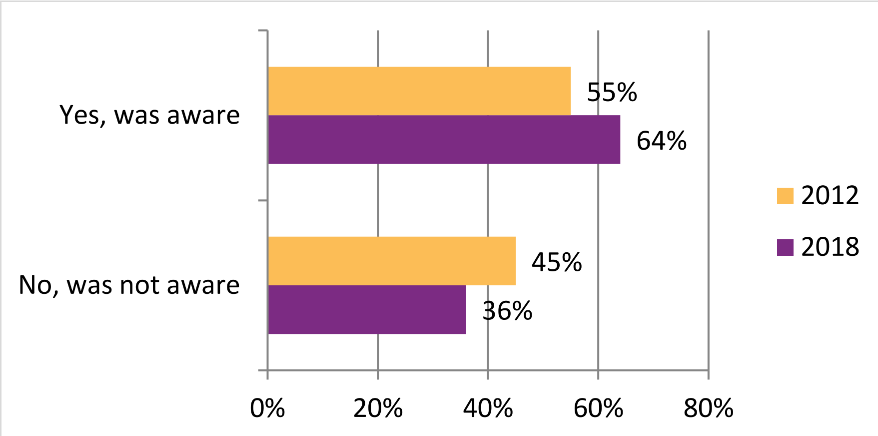
***Figure 5 – Prompted understanding of raw milk***




Q315: Which of the following descriptions do you think most accurately describes raw milk? Base: All respondents (1,323 (2018); 1,333 (2012))

A shift in awareness around the consumption of raw milk and cream is evident with nearly two thirds of consumers (64%) in 2018 being aware that some people choose to consume RDM compared to just over half (55%) of consumers being aware of the choice to consume RDM in 2012. The results are shown in Figure 6.

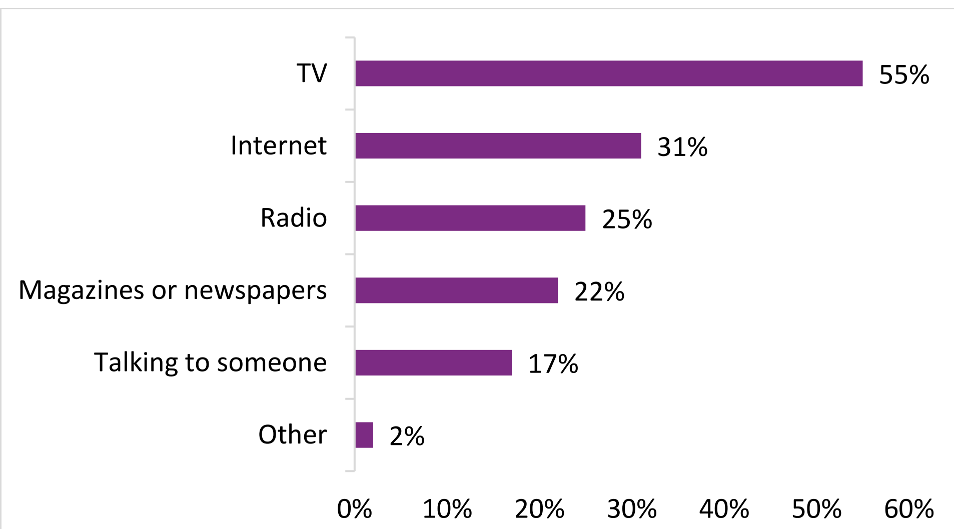
*Figure 6 – Awareness that people consume raw milk*




Q320: Raw milk comes direct from the cow/goat/sheep/buffalo and isn't pasteurised (heat treated) at all. Were you aware that some people choose to consume raw milk and cream? Base: all respondents (1,323 (2018); 1,333 (2012))

The proportion of consumers who had heard anything about raw milk or cream recently, has also risen from 3% in 2012, to 12% in 2018. Awareness of RDM in 2018 is predominantly gained from the television or internet, as shown in Figure 7. The BBC's Countryfile programme was mentioned in particular.

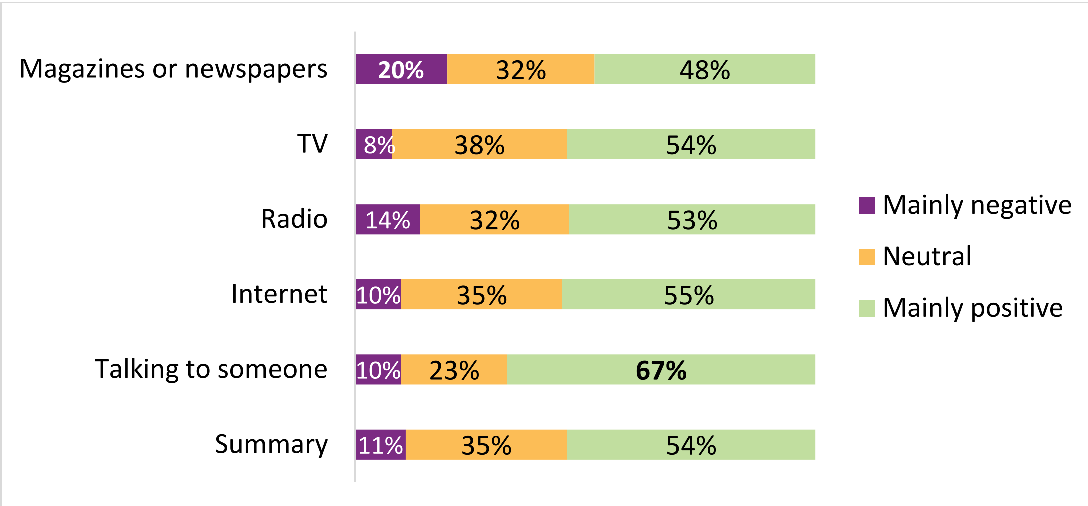
*Figure 7 – Where heard about RDM (among those who have heard something)*




Q435: Where did you hear about raw milk/cream? Base: All who have heard about raw milk/cream recently (147)

The tone of the coverage people have seen regarding RDM is mainly perceived to be neutral or positive. The highest level of negative coverage was seen in magazines or newspapers; whilst the most positive tone is heard through word of mouth, as illustrated in Figure 8.

*Figure 8 – Tone of what has been heard about RDM*

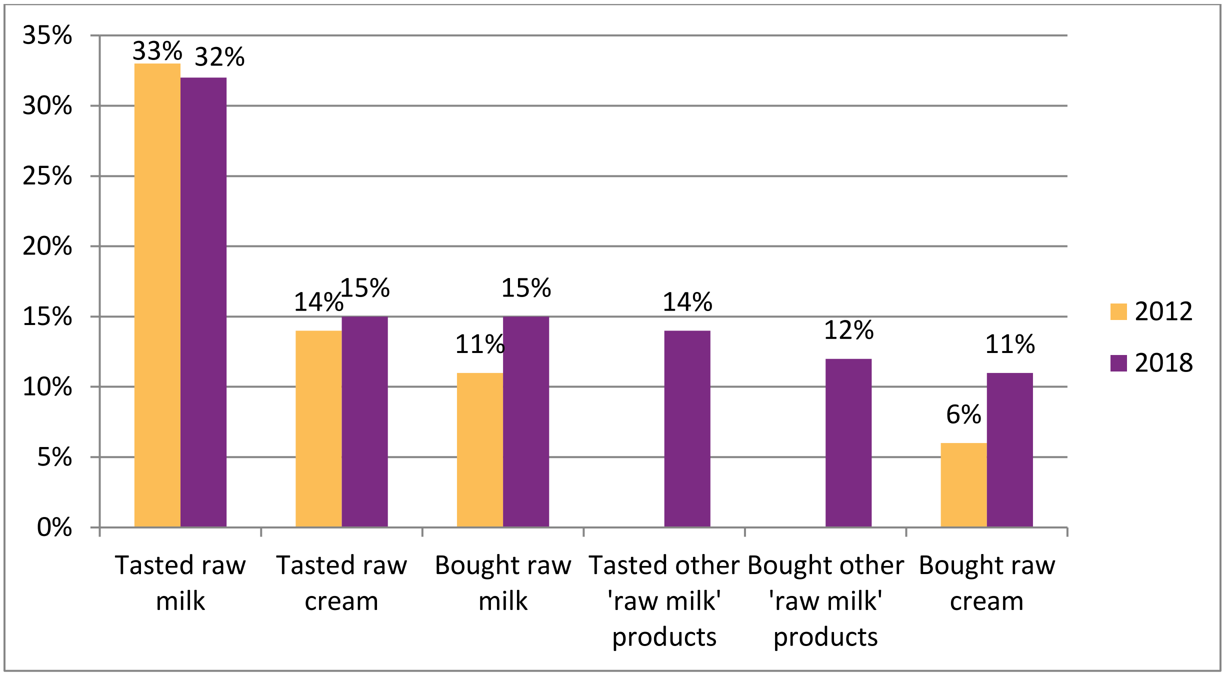



Q440 (Summary): Thinking about what you heard, was it mainly positive (i.e. mainly focusing on the advantages of raw milk and cream), neutral (i.e. taking no viewpoint) or mainly negative (i.e. mainly focusing on the disadvantages of raw milk and cream)?
Base: All who have heard about raw milk/cream recently (Magazine/newspaper = 28, TV = 82, Radio = 34, Internet 46, Talking to someone = 22, Summary = 217)

## 3.2 Consumption of RDM

A third of consumers in 2018 (32%) have ever tasted or bought raw milk. Raw milk is more likely to have been tasted or bought by consumers than raw cream or other raw milk products, such as smoothies or milkshakes. Consumption and purchasing of raw milk in 2018 is fairly similar to the corresponding 2012 figure. In 2018 respondents were additionally asked about consumption of other raw milk products (no comparison data is available for 2012.) Figure 9 shows all these results.

***Figure 9 – Consumption and purchase of RDM***




Q325: And to the best of your knowledge, have you ever...tasted/bought raw milk/raw cream/other 'raw milk' products? Base: all respondents (1,323 (2018); 1,333 (2012))

Analysis of the demographics of those who have tasted and/or bought raw milk shows that men are significantly more likely than women to have tried and/or bought raw milk. The youngest age group of (16-24 year olds) are less likely than older consumers to have tasted raw milk, whilst the highest percentage of consumers to have bought raw milk is in the 25-44 year old age group.

| | Gender | | Age | | | |
|---|---|---|---|---|---|---|
| | Male | Female | 16-24 | 25-44 | 45-64 | 65+ |
| Base | 630 | 693 | 146 | 472 | 431 | 274 |
| Those who have tasted raw milk | **37%** | 28% | **25%** | 36% | 29% | 34% |
| Those who have bought raw milk | **18%** | 13% | 12% | **25%** | 9% | 11% |

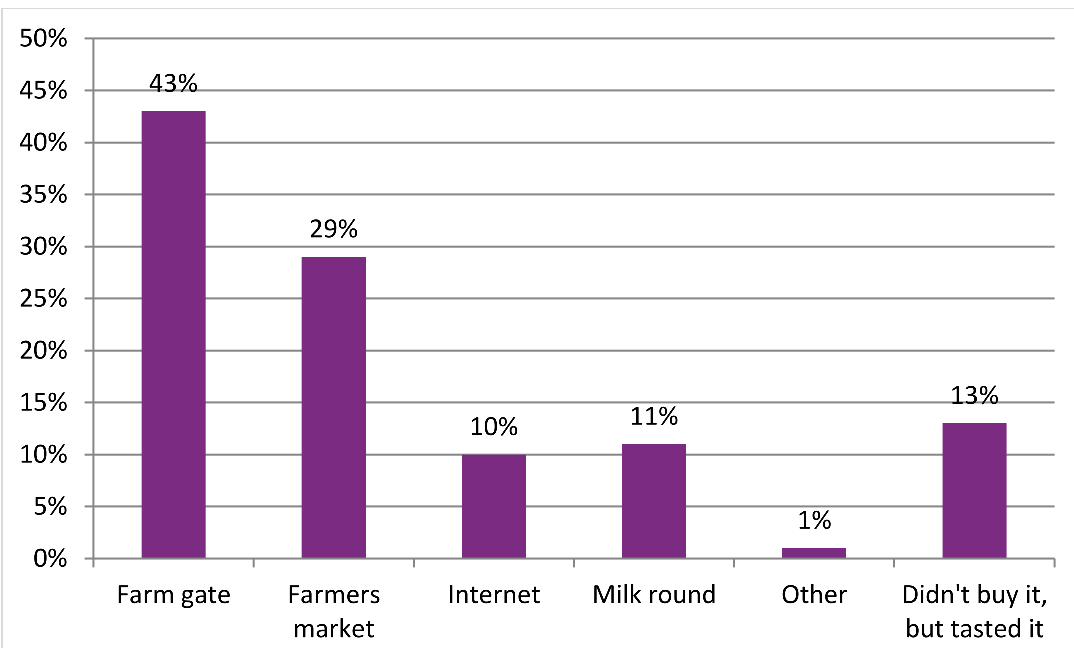
Further analysis of the demographics shows that consumers from the ABC1 socio economic group are significantly more likely to have tasted and/or bought raw milk than those from C2DE backgrounds. Consumers in Wales are less likely to have tasted raw milk than those in England or Northern Ireland, whilst those in England are significantly more likely to have bought raw milk than those in Wales or Northern Ireland.

| | SEG | | Country | | |
|---|---|---|---|---|---|
| | ABC1 | C2DE | England | Wales | N. Ireland |
| Base | 719 | 604 | 917 | 204 | 202 |
| Those who have tasted raw milk | **37%** | 27% | 32% | **25%** | 38% |
| Those who have bought raw milk | **20%** | 11% | **16%** | 6% | 7% |

Those who have tasted or bought raw milk have predominantly tried raw milk from cows (87%) followed by goats (20%), sheep (12%) and buffalo (7%), reflecting similar results as those seen in 2012.

Amongst those who have either tasted or bought RDM, 43% have bought it from the farm gate whilst 29% have bought it at a farmers market. One in ten (10%) have purchased RDM products over the Internet. Where the products have been purchased is shown in Figure 10.

***Figure 10 – Where RDM Products were purchased***




Q332B: And have you bought raw milk or cream from any of the following? Base: All who have tasted or bought raw milk or cream (441)

Amongst those who have ever tasted or bought RDM, almost one in three (30%) still currently buy and/or consume it. This equates to 10% of the total sample representing **an increase in those currently buying/consuming RDM, as a per cent of the entire population from 3% in 2012.**

The table below shows some key sub-group differences in terms of current consumers of RDM, showing that:

- Younger consumers (16-44) are more likely to currently buy and/or consume RDM than 45+ year olds
- Consumers in the ABC1 socio-economic group are more than twice as likely to be currently buying and/or consuming RDM as those in the C2DE group
- Consumers in England are more likely to be currently buying and/or consuming RDM than is the case for those in Wales and Northern Ireland.

***Table: Per cent of each group currently consuming***

| | |
|---|---|
| Male | **12.7%** |
| Female | 7.8% |
| 16-24 | **15.7%** |
| 25-44 | **19.9%** |
| 45-64 | 2.4% |
| 65+ | 2.2% |
| ABC1 | **14.1%** |
| C2DE | 5.7% |
| England | **10.7%** |
| Wales | 2.9% |
| Northern Ireland | 4.9% |

Q330: You said that you have either tasted or bought raw milk or cream, do you currently buy and/or consume raw milk or cream? Base: All respondents (1,323)

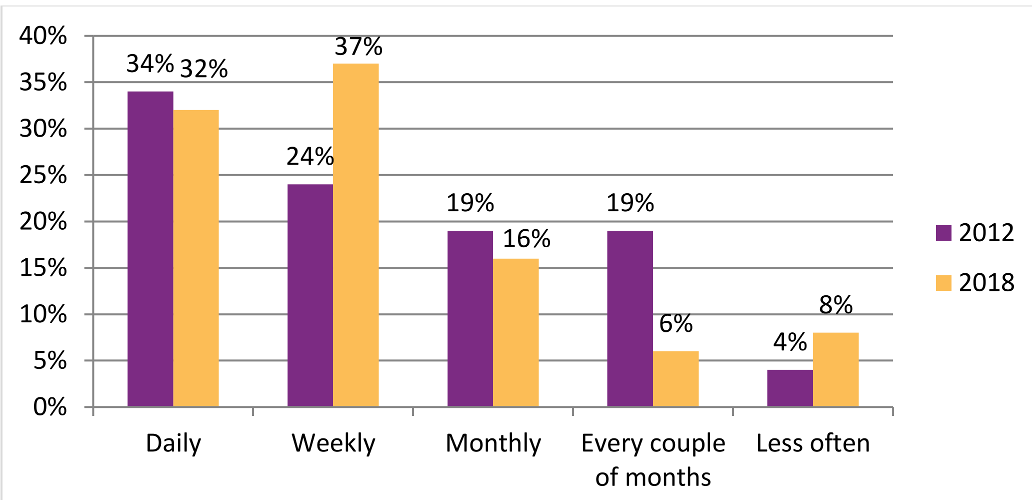
In total, 11% of the sample reported that a child or children under 18 consumes RDM products. This comprised 8% who reported a child in their own household does so and 3% who reported that a child not in their household is a consumer of RDM products (i.e. if their children do not live with them).

## 3.3 Current consumers of RDM

Almost three quarters (72%) of current consumers of RDM only started consuming in the last year, with a quarter (26%) drinking or buying it for less than three months. A smaller proportion (15%), are longer term consumers who have been doing so for over two years.

The majority of current RDM consumers buy or drink it on a regular basis – almost one third (32%) do so daily, and a similar proportion (37%) do so weekly. Comparing these findings to those from 2012 shows a shift to **more frequent consumption** amongst consumers of RDM. In 2012 a higher proportion of current consumers of RDM were consuming monthly or less (42%) compared to in 2018 (30%), as Figure 11 shows.

***Figure 11 – Frequency of consumption***

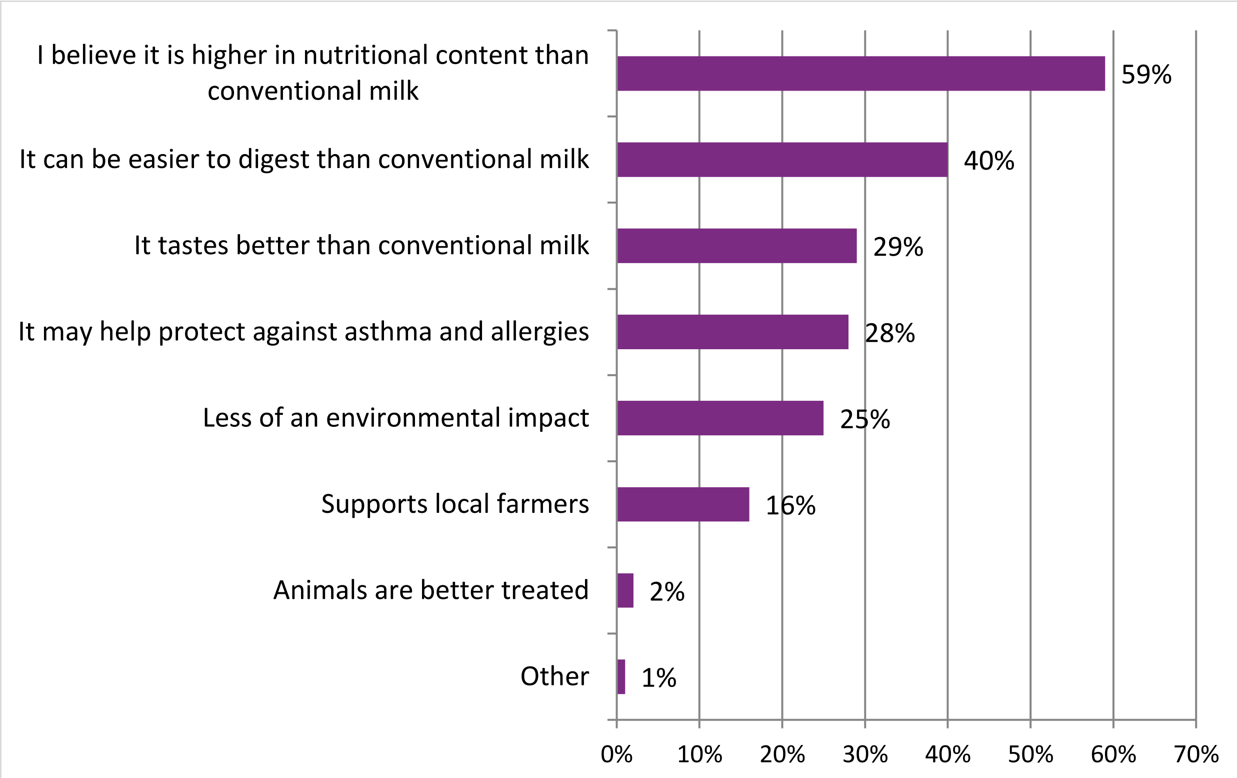



Q340: Which of the following best describe how often you buy/drink raw milk or cream? Base: All who currently buy raw milk or cream (113 (2018), 29 (2012))

When asked how their consumption of RDM has changed over the last 12 months, consumers also report **a rise in their consumption levels**, with over a quarter (26%) saying they consume much more and a further 45% saying they consume a bit more than they did 12 months ago. A comparatively small proportion (9%) says they consume less. When those who are buying or consuming every couple of months or more frequently are asked who is consuming RDM within their household, 82% report that everyone within the household is consuming it. The comparative result in 2012 was 77%.

When asked why they choose to buy/drink RDM, over half of frequent (consuming at least every two months) RDM consumers cite a belief that it is higher in nutritional content than conventional milk. Other reasons for purchase include; ease of digestion, better taste, protection against asthma and allergies, and less of an environmental impact. Figure 12 shows the responses.

*Figure 12 – Reasons for consumption*




Q355: For what reason(s) do you buy/drink raw milk or cream? Base: All who have tasted or bought raw milk or cream every couple of months or more frequently (103)

## 3.4 Non-consumers of RDM

The most common reasons cited for no longer buying and/or consuming RDM, among those who previously have done so, relate to a lack of opportunity or access to RDM (e.g. they tried it as a one-off whilst on a farm visit or they used to live/work on or near a farm.) Risks/safety concerns were cited as a reason by 16% of lapsed consumers. A range of other reasons were cited, as shown in Figure 13.

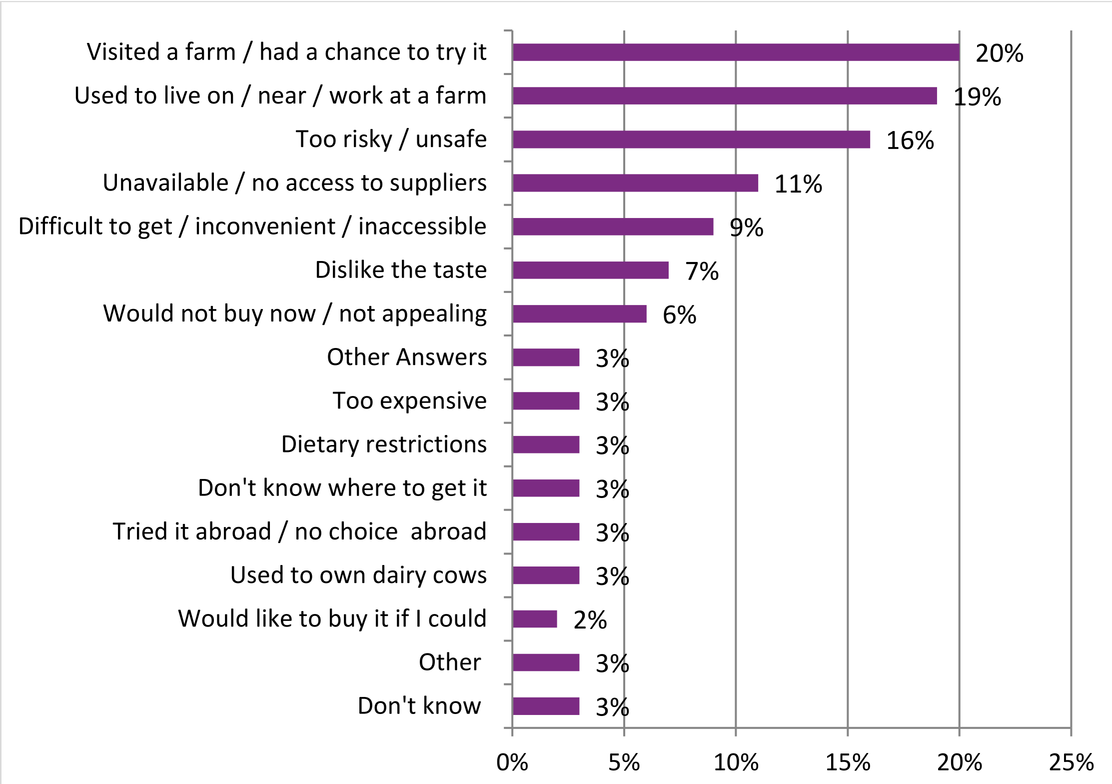
*"I was brought up on a dairy farm which ended in the 1970s – never had access to it since then"*

*"I tried it as part of a tour, it is not readily available to me where I live and shop"*

*"I think I have in the past when I was small, but I wouldn't think it was safe to drink these days."*

Amongst those who have never bought or tasted RDM but were aware that some people do (62 people within the sample), 39% had seen it for sale but had actively chosen not to buy it. The main reasons for not purchasing RDM were concerns about the health risks or apprehension about the taste. A third also felt they didn't know enough about RDM to consider buying it.

*Figure 13 – Reasons for no longer consuming*




Q331: You said that you have either tasted or bought raw milk or cream, but no longer do so. Please could you tell us why you no longer buy/consume raw milk or cream? Base: All who don't currently buy/consume raw milk or cream (328)

## 3.5 Future consumption intentions

All who took part in the survey were asked to rate their level of interest in consuming RDM in the future. The highest level of interest was seen for RDM ice cream products with 28% stating they would be interested. However, interest was broadly similar across all RDM products and just over three quarters of the sample (76%) were either neutral or negative about their future interest in raw milk or cream, as Figure 14 illustrates.

Levels of interest in future consumption of raw milk or cream are broadly consistent with the findings from 2012 with a small upward shift in the per cent of those interested or very interested from 19% in 2012, to 24% in 2018. The per cent who are very interested has also risen from 3% in 2012, to 6% in 2018.

*Figure 14 – Future interest in RDM products*


Q400: Regardless whether you have or have not ever bought or consumed raw milk or cream, how interested would you be in buying it and/or consuming it in the future? Q400B: And how interested would you be in buying and/or consuming other 'raw milk' products in the future? Base: All respondents (1,323)

Analysis of those interested in consuming RDM in the future by key sub groups mirrors some of the findings with regard to current consumption patterns. Again, those in the younger age groups, particularly 25-44 year olds, are more likely to be interested than those in the older groups, whilst those in England are also more likely to be interested than those in Wales or Northern Ireland. However the patterns seen with consumption in terms of SEG and gender are not replicated.

| | **Gender** | | **Age** | | | | **SEG** | | **Country** | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | **Male** | **Female** | **16-24** | **25-44** | **45-64** | **65+** | **ABC1** | **C2DE** | **England** | **Wales** | **N. Ireland** |
| Base | 630 | 693 | 146 | 472 | 431 | 274 | 719 | 604 | 917 | 204 | 202 |
| Interested in future consumption | 24% | 25% | 24% | **34%** | 21% | 14% | 25% | 24% | **25%** | 19% | 18% |

Q400: Regardless whether you have or have not ever bought or consumed raw milk or cream, how interested would you be in buying it and/or consuming it in the future? Base: All respondents (1,323)

## 3.6 Perceived benefits and drawbacks of RDM

Respondents struggled to cite, unprompted, what they consider to be the main benefits associated with RDM. Over a quarter (26%) didn't know of any benefits and a further 16% could not think of any benefits; whilst 6% cited nothing in particular. The majority of benefits mentioned focus on perceived health benefits compared to pasteurised milk, such as the purity and lack of processing and additives, and a belief that RDM contains more nutrients, as shown in Figure 15.

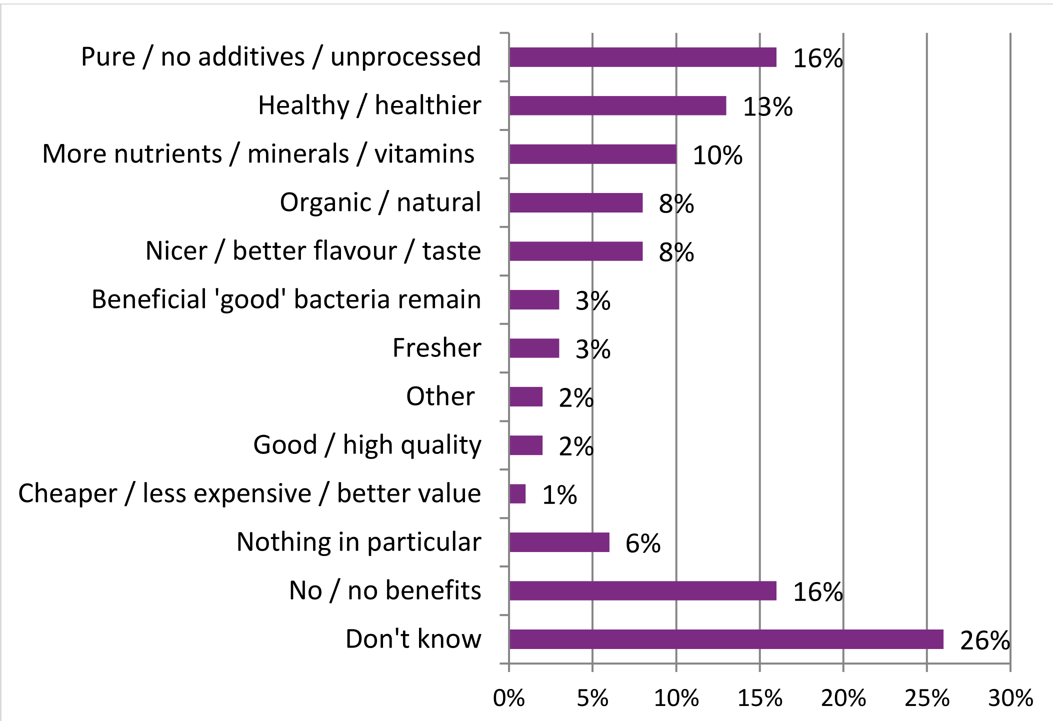
*"[It has] naturally occurring nutrients that are not heat treated and remains in natural state"*

*"Organic and as nature intended"*

*"Smaller scale, better treatment and less 'manufactured'"*

*"Builds up the body's natural defences against bugs, viruses and diseases"*

***Figure 15 – Perceived benefits of raw milk / cream***




Q410: Based on anything you might know about raw milk/cream, what do you think the main benefits associated might be?
Base: All respondents (1,323)

As Figure 16 shows, the drawbacks associated with consuming RDM were comparatively more top-of-mind, with a smaller percentage of respondents struggling to cite, unprompted, any drawbacks - just 18% stated 'don't know'. The main unprompted drawbacks link to hygiene concerns and risks to health. Lack of availability of RDM and the cost of RDM were also unprompted drawbacks, but only cited by a small percentage of consumers.

*"Just do not think it sounds very healthy"*

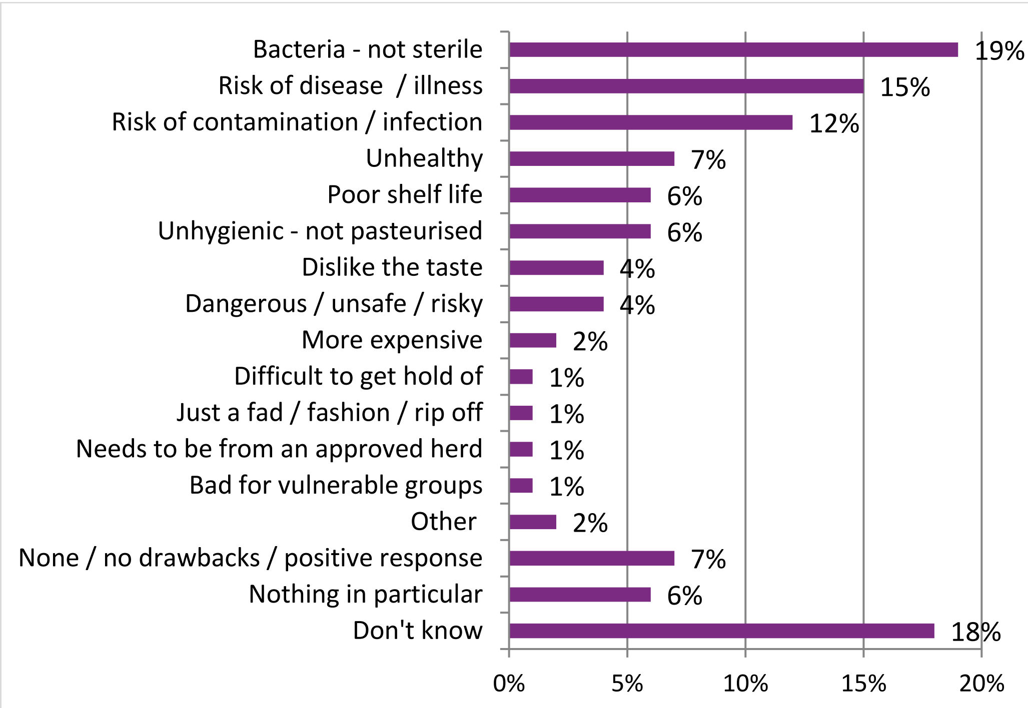
*"Short shelf life/would go off quickly. Potential for transmission of diseases to humans."*

*"Possible infection – caution in pregnancy/small children/vulnerable and at risk groups"*

*"It isn't treated and there is obviously a reason why dairy is treated".*

*"Dangerous to drink, less regulated. Sold as a faddy product rather than actual health benefits"*

*Figure 16 – Perceived drawbacks of raw milk / cream*



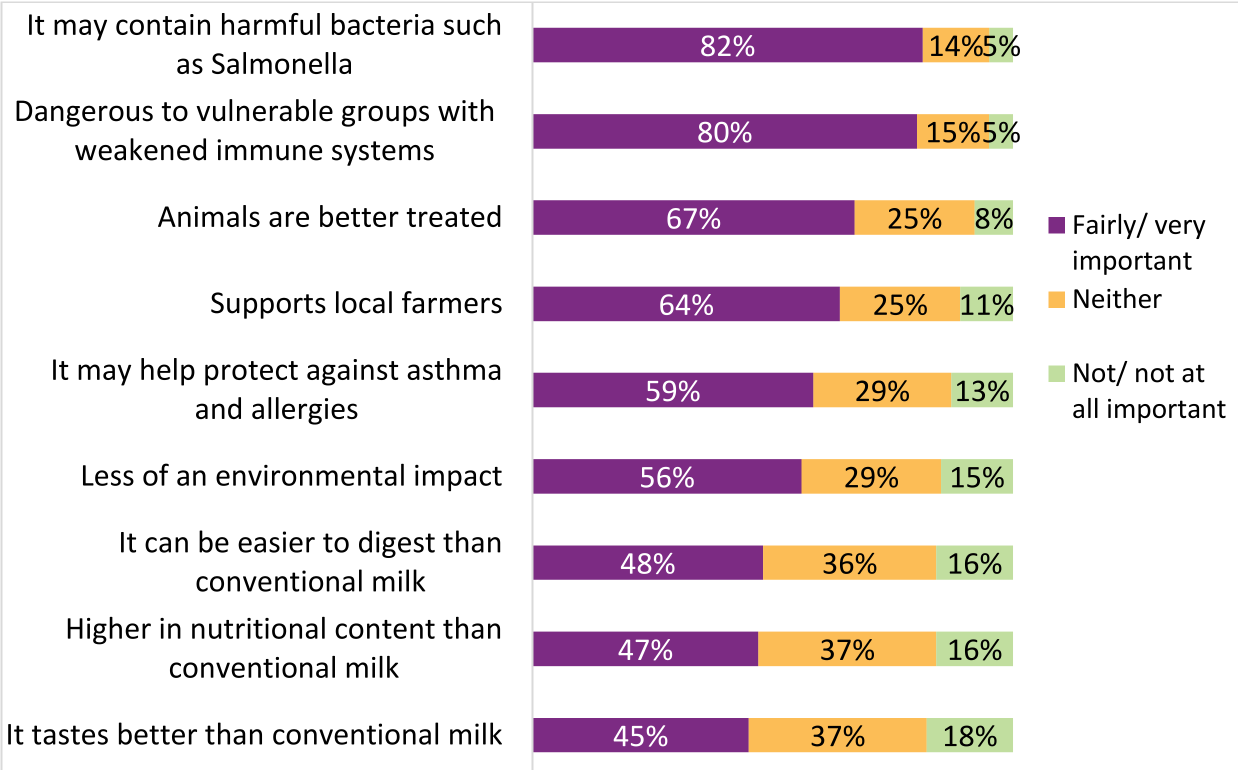

Q.415: And what do you think the main drawbacks associated with raw milk/cream might be? Base: All respondents (1,323)

Consumers were also asked to rate the relative importance to them or their families, of different prompted benefits or drawbacks associated with RDM when considering whether to buy it. Health risks were again a prominent concern.

Consumers saw the most important drawbacks as being the fact that RDM may contain harmful bacteria such as Salmonella, and that it can be dangerous to vulnerable groups with weakened immune systems.

In terms of benefits deemed most important, around two thirds (67%) felt the fact that animals are better treated is important, and a similar proportion (64%), felt it important that purchasing RDM supports local farmers. Overall, the 2018 findings are broadly similar to those from 2012, with the top five most important benefits and drawbacks appearing in the same positions in both waves of the survey.

*Figure 17 – Importance of benefits and drawbacks*




Q450: Below are some benefits and drawbacks that have been associated with raw milk or cream, please can you indicate how important each of these would be when considering whether to buy raw milk/cream for you and your family? Base: All respondents (1,323)

| | **2012** (NET importance score*) | **2018** (NET importance score*) |
|---|---|---|
| It may contain harmful bacteria such as Salmonella | **77%** | **82%** |
| It can be dangerous to vulnerable groups with weakened immune systems | **76%** | **80%** |
| Animals are better treated | **62%** | **67%** |
| Supports local farmers | **60%** | **64%** |
| It may help protect against asthma and allergies | **54%** | **59%** |
| Less of an environmental impact | **51%** | **56%** |
| It can be easier to digest than conventional milk | **43%** | **48%** |
| I believe it is higher in nutritional content than conventional milk | **54%** | **47%** |
| It tastes better than conventional milk | **46%** | **45%** |

Q450: Below are some benefits and drawbacks that have been associated with raw milk or cream, please can you indicate how important each of these would be when considering whether to buy raw milk/cream for you and your family? Base: All respondents (1,323)

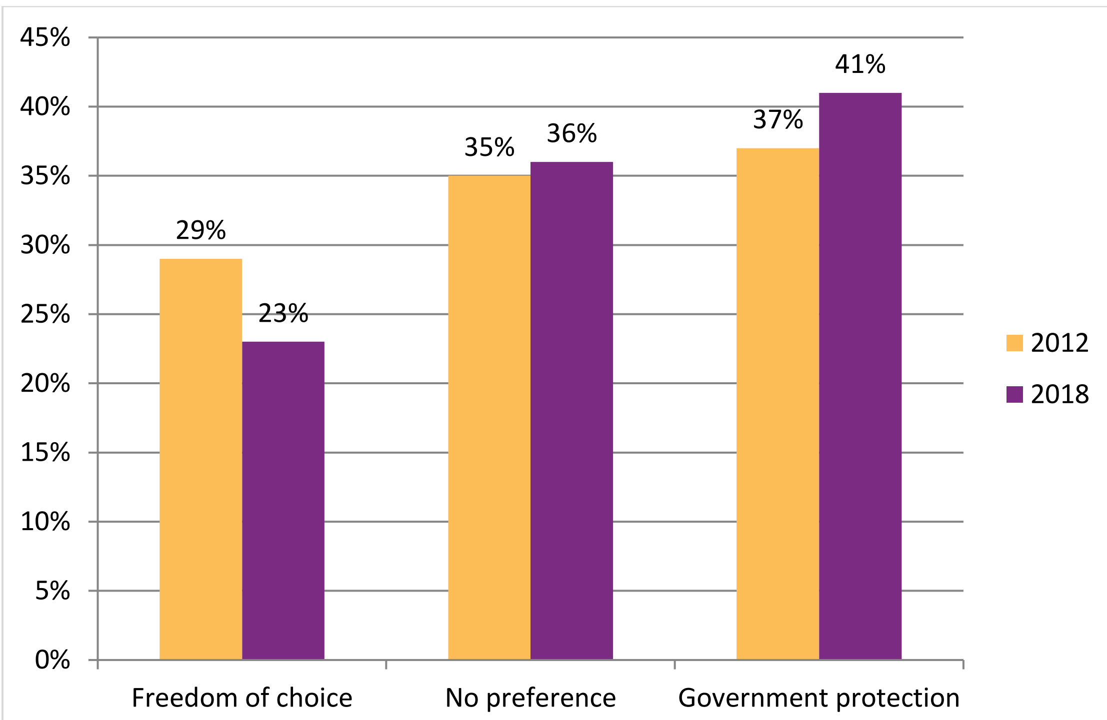
* NET importance score = Fairly important + very important.

## 3.7 Attitudes to regulation / banning/ allowing sales of RDM

Consumers were asked how important they felt freedom of choice is in relation to the sale of RDM as compared to Government protection. Whilst over a third of consumers (36%) had no preference either way, a greater proportion (41%) believe the Government protecting public health in relation to RDM is important, compared to the 23% who err towards freedom of choice for consumers. In fact 23% of the sample indicated a score of '5' on the question scale – placing their position as far towards the statement 'Government should protect public health and the sale of raw milk and cream should be banned' as possible.

When comparing the 2018 results to the 2012 survey, this represents a shift towards Government protection (as shown in Figure 18); although the proportion of the sample placing themselves at the farthest end of the scale is very similar – 23% in 2018 vs. 22% in 2012.

***Figure 18 – Freedom of choice vs. Government protection***

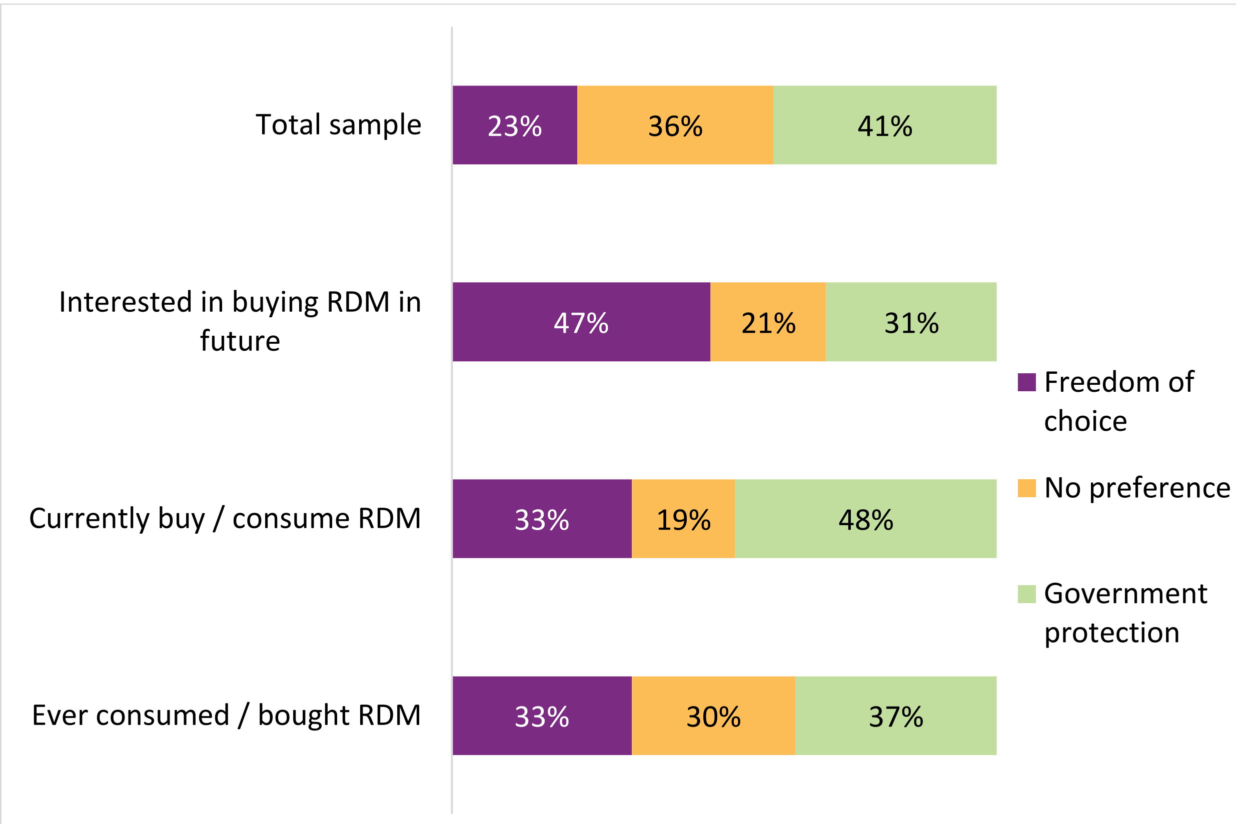



Q420: Some people think that freedom of choice in relation to raw milk and cream is extremely important and it should be available for sale. Others think that it is extremely important that the government protect public health and the sale should be banned. Using the scale below, where 1 indicates that you think 'freedom of choice in relation to raw milk and cream is extremely important and it should be available for sale' and 5 indicates that you think 'Government should protect public health and the sale of raw milk and cream should be banned' and 3 indicates no preference either way, please indicate where you sit. Base: All respondents (1,323 (2018); 1,333 (2012))

As Figure 19 shows, when these views are examined by current consumption patterns, we find that those that currently buy or consume RDM are more likely to be in favour of Government protection (48%) than the broader group of those who have ever tried it (37%) (who are more likely to feel neutral towards the issue than current consumers). The question was represented as a sliding scale to indicate, on the one hand freedom of choice and on the other Government protection and banning of sales. Whilst it seems counter-intuitive that current consumers would be more in favour of the latter, this may indicate a strong call for Government protection, rather than banning of sales, on their part. This was not a direct question *'Should sales be banned outright - Yes or No?'* which may have elicited a different response from current consumers. Those who consume RDM, it seems, wish to feel protected in their purchases and seem to have indicated this through their answer to this question; although some further research with current buyers may be needed to be certain of this.

Those interested in buying in the future are more likely to support freedom of choice (47%); in fact nearly a third of this group (31%) indicated the strongest feeling towards freedom of choice, compared to just 13% of the sample as a whole.

***Figure 19 – Freedom of choice vs. Government protection by consumption***




Q420: Some people think that freedom of choice in relation to raw milk and cream is extremely important and it should be available for sale. Others think that it is extremely important that the government protect public health and the sale should be banned. Using the scale below, where 1 indicates that you think 'freedom of choice in relation to raw milk and cream is extremely important and it should be available for sale' and 5 indicates that you think 'government should protect public health and the sale of raw milk and cream should be banned' and 3 indicates no preference either way, please indicate where you sit.

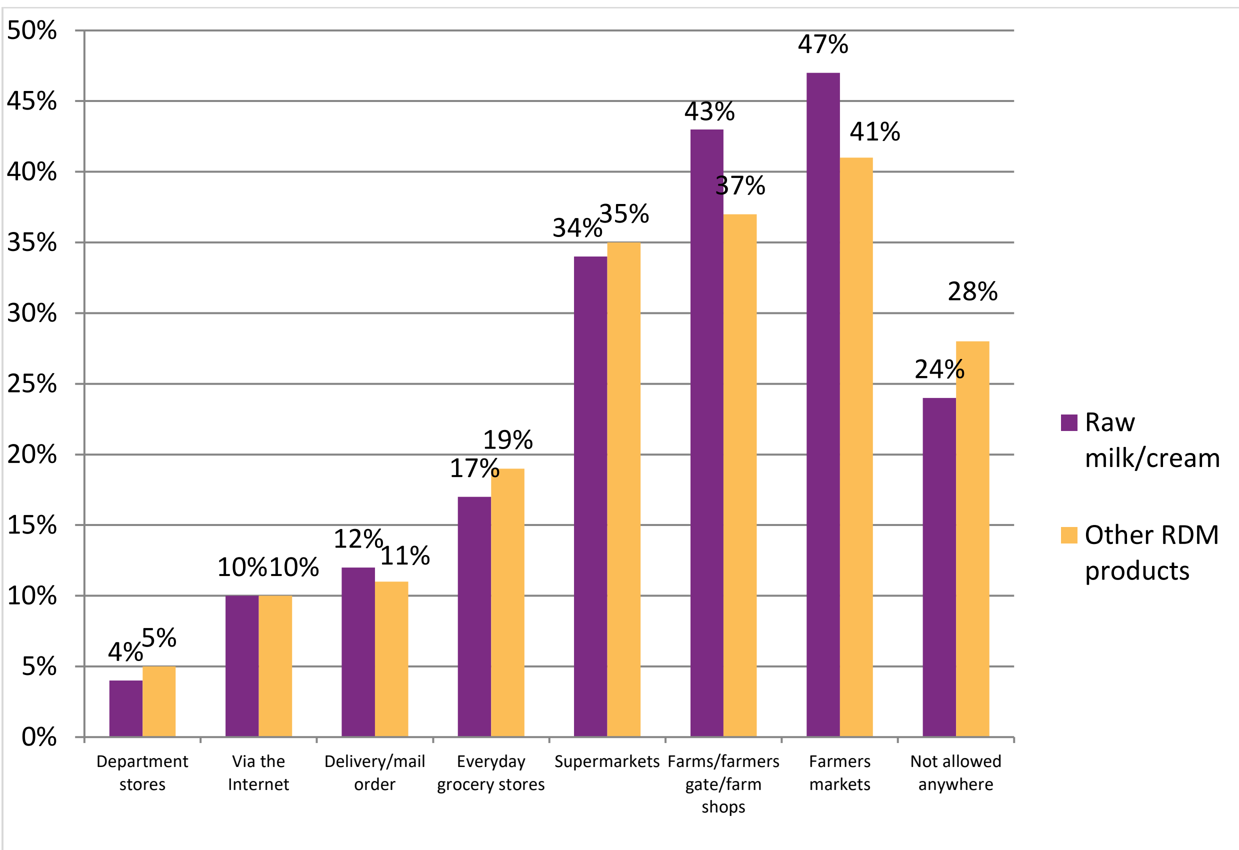
Bases: All who have consumer or bought RDM (478), all who currently buy/consume RDM (113), all who are interested in buying in the future (303)

Looking at the demographic sub groups, with regards to supporting freedom of choice, shows a consistent view between men and women and across the age ranges and socio-economic groups. Looking at support for government protection by demographics shows a somewhat less consistent view across age groups, with almost half of those in the 65+ age group (49%) supporting Government protection compared 37% of 16-24 year olds and 35% of the 45-64 age group. Analysis of the socio-economic groups also highlights a stronger level of support for Government protection among the ABC1 group (46%) compared to the C2DE group (36%).

Comparing demographic differences with the findings from 2012 reveals a change in terms of the genders. In 2012 more women (40%) than men (34%) supported government protection. Whilst the level of support for government protection has remained stable amongst women in 2018 (39%), the level of support among men now exceeds women's (44%).

Consumers were asked their views on the most appropriate places for selling RDM and RDM products. Farmers markets and farms were seen as the most suitable sales channels to consumers, followed by supermarkets. Around a quarter of all respondents (24%) thought RDM should not be sold at all, and even more (28%) felt RDM products shouldn't be sold at all.

***Figure 20 – RDM and RDM product retail channels***




Q600: Where do you think raw milk and cream should be available for sale? Base: All respondents (1,323)
Q600B: And where do you think other raw milk products (e.g. smoothies / milkshakes / ice cream) should be available for sale? Base: All respondents (1,323)

A similar question was asked in 2012 but only to consumers who felt RDM should be sold at all, rather than all respondents. Findings were broadly consistent with those in 2012 with the top three most suitable channels to market viewed to be farmers markets, farms directly and supermarkets.

# 4. Conclusions

Overall when comparing the findings from this survey with the 2012 survey, there is a noticeable shift in awareness and consumption of RDM. Those that are consuming it are relatively new consumers of RDM They are consuming more regularly and they report an increase in their consumption levels over the last 12 months.

Consumption appears to be driven by a belief that RDM has a higher nutritional value to conventional milks and although there is some awareness of the potential health/safety risks, these seem to be outweighed by the perceived nutritional benefits for those who are choosing to consume RDM.

There is not a widespread interest in consuming RDM in the future, but where there is interest, it is found mainly within the 25-44 age range and within England.

Views on Government protection and freedom of choice have also shifted slightly since 2012 with more people now in support of Government protection in the selling of RDM, even and in fact to a greater extent amongst those who currently consume RDM.