

CHEESE & DAIRY

a  SNAP! keynote

deep dives into consumer dairy consumption

consumer affinity by cheese variety

top-performing cheese-forward items at leading restaurant chains

cheese and dairy menu trends

operator approaches to purchasing and menuing

full chapters on milk, yogurt, sour cream, and non-dairy alternatives

Wisconsin may be America's Dairyland, but cheese is loved across the country. Whether it's topping a pizza or burger, stirred into a dip, or starring in a dessert, cheese is a menu mainstay and consumer favorite. Beyond cheese, the landscape around is other dairy is nearly as promising. Styles of yogurt continue to proliferate, sour cream is riding the wave of Mexican food, and even non-dairy alternatives are establishing an ever-larger footprint. Datassential's Cheese & Dairy Keynote covers varieties, applications, menu trends, and more. **Learn about the whys as well as the wheys.**

CHEESE & DAIRY: a SNAP! keynote

Topics covered

understand how consumers feel about cheese

- o learn which hard, soft, fresh and processed cheeses are consumers' favorites
- o discover which foods are considered must-haves with cheese

explore cheese consumption patterns of 1,500 consumers

- o quantify how often consumers eat cheese both at home and away
- o get a read on which dayparts and mealparts are most common cheese choices
- o identify behavioral differences among numerous demographic slices, such as age, gender, and parental status

track cheese menu trends by segment, menupart and cuisine

- o see which cheeses have the highest menu penetration and where
- o become a trend expert on which cheeses are growing fastest
- o look at the applications in which operators are using cheese most, and most creatively

learn the dynamics of other dairy categories

- o decide how best to leverage secondary products like milk, yogurt, sour cream and other cultured foods like buttermilk, and non-dairy milks, yogurt and cheeses
- o see consumer consumption patterns and affinity
- o Find out which operators are increasing their use of these products and how

From the report

● CONSUMERS

94% of consumers or more have cheese with pizza, burgers, and sandwiches

46% look forward to signature cheese dishes at restaurants

44% agree cheese is usually a good value

● OPERATORS

60% of operators say adding cheese to an item helps it sell better

44% are interested in cheese recipes and menu ideas

73% purchase ready-to-use products featuring cheese

1,508 consumers demographically balanced to the general population

317 restaurant, retail, and on-site operators



report



x-tab tool



webinar

DOWNLOAD TODAY. Please contact Brian Darr at 312-655-0594 or brian@datassential.com.

CHEESE AND DAIRY

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EDITOR'S NOTE

This Keynote Report's consumer and operator surveys were fielded in early February. In mid-March, the world changed, as the World Health Organization declared a global pandemic and the Trump administration declared a national emergency, which intensified the sense of crisis around COVID-19, or "Coronavirus," and brought about widespread social distancing.

While Coronavirus will have drastic, complex effects on foodservice overall, this report was fielded at such a time as to provide the best baseline of sentiment and attitudes toward dairy. The insights are sound, based on normal, pre-crisis responses, and are suited to long-term planning and strategy by those trying to understand consumers' attitudes toward dairy.



METHODOLOGY

fielded online February 2020

1,508 consumers were surveyed overall

317 operators via the Datassential panel

- 149 restaurant operators
- 133 on-site operators
- 35 retail foodservice operators

full demographic info is available in the appendix



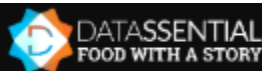
OBJECTIVES

- identify consumer cheese and dairy consumption habits and preferences
- understand motivations for and attitudes toward cheese and dairy consumption at home and away from home
- analyze operator motivators, preferences, and challenges with menuing cheese and dairy
- in-depth analysis of new menu items featuring cheese and dairy
- Identify supplier opportunities for consumer and operator engagement around cheese and dairy

Slide Legend

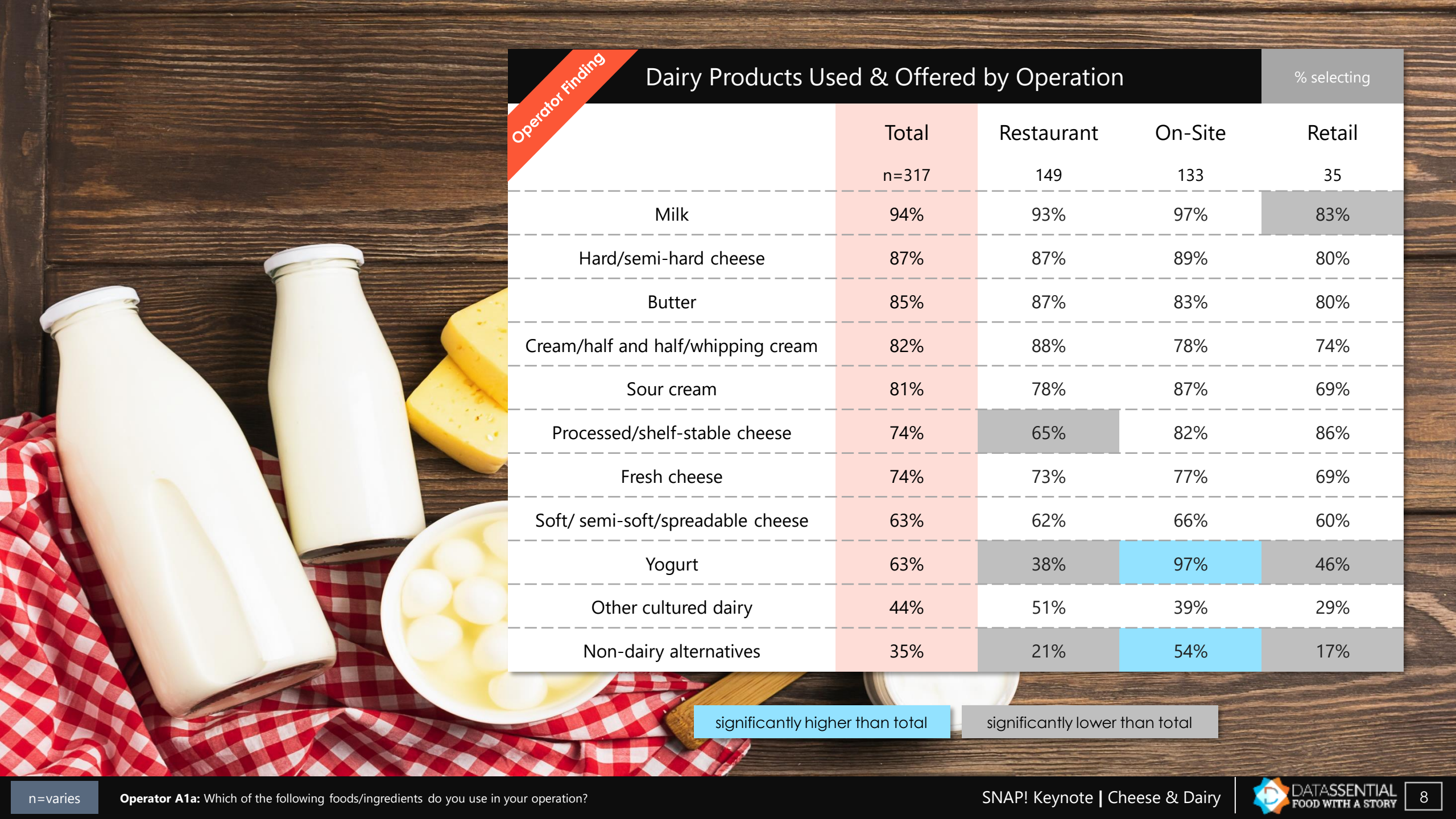
In addition to custom research, this report taps into Datassential's SNAP! platform. Refer to the stripe on the left side and the icon on the bottom right corner to learn the source of the slide's data.

Survey Data



MenuTrends





Operator Finding

Dairy Products Used & Offered by Operation

% selecting

	Total	Restaurant	On-Site	Retail
	n=317	149	133	35
Milk	94%	93%	97%	83%
Hard/semi-hard cheese	87%	87%	89%	80%
Butter	85%	87%	83%	80%
Cream/half and half/whipping cream	82%	88%	78%	74%
Sour cream	81%	78%	87%	69%
Processed/shelf-stable cheese	74%	65%	82%	86%
Fresh cheese	74%	73%	77%	69%
Soft/ semi-soft/spreadable cheese	63%	62%	66%	60%
Yogurt	63%	38%	97%	46%
Other cultured dairy	44%	51%	39%	29%
Non-dairy alternatives	35%	21%	54%	17%

significantly higher than total

significantly lower than total

Importance of Cheese to Different Menu Items



% of consumers calling cheese important or very important to that menu item

87%

Pizza

78%

Burgers

78%

Sandwiches

70%

Other breakfast items

69%

Pasta

68%

Breakfast handheld items

68%

Other handheld items

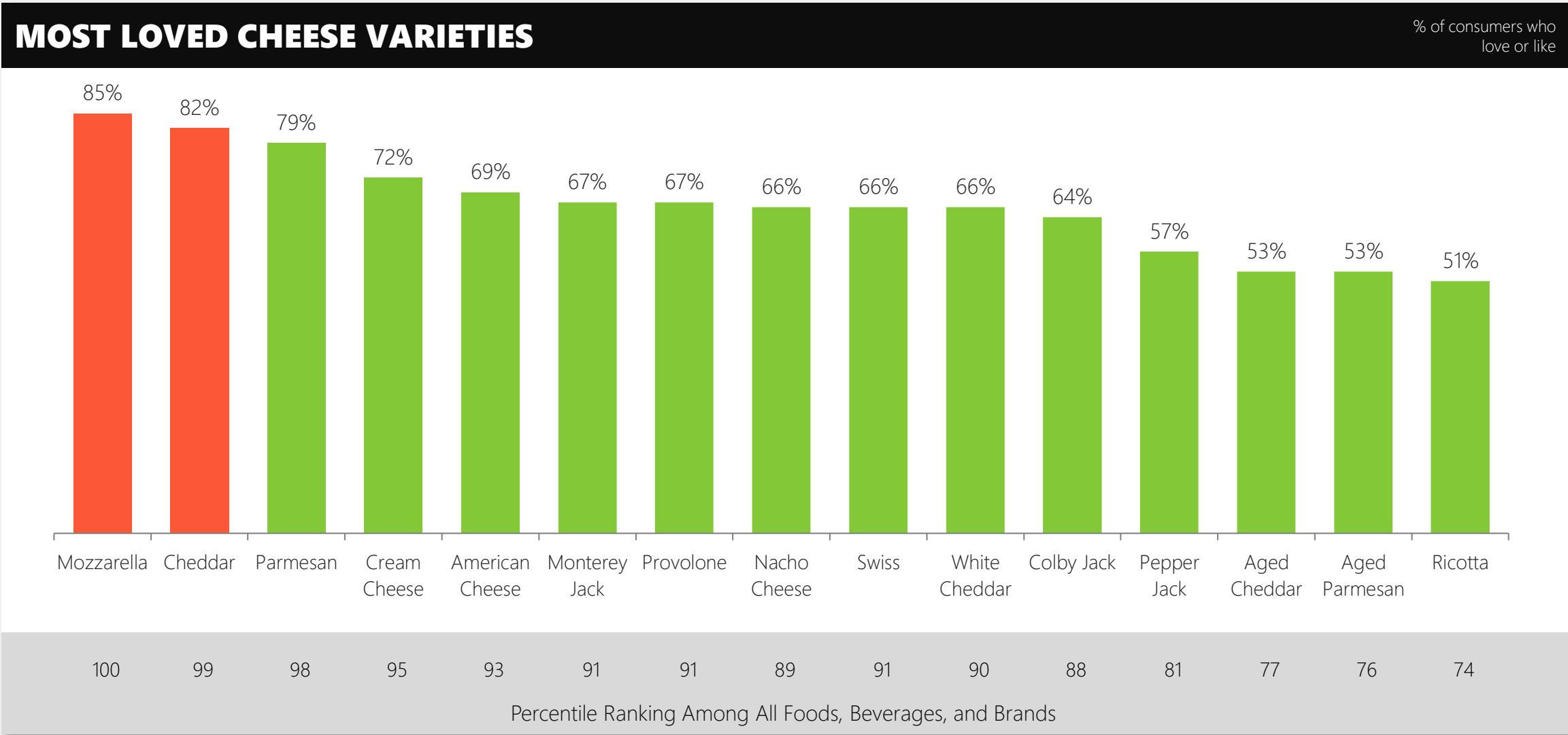
65%

Appetizers and sides

60%

Entrees

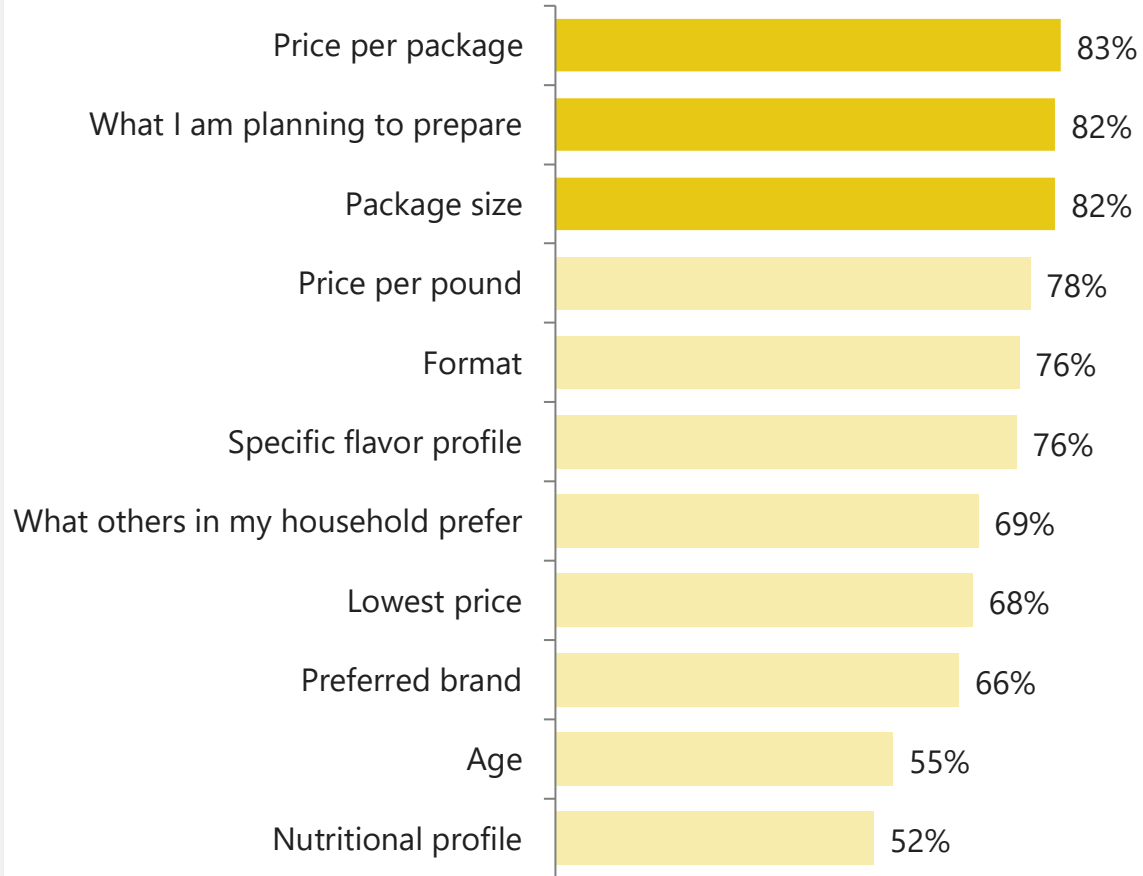
Consumers' favorite cheeses are a varied mix of styles, with mozzarella and cheddar **Several Italian cheeses rank among the most admired varieties.** Modified versions of classic cheeses, like white Cheddar and aged Cheddar, also rank highly with consumers.



Cheddar and parmesan purchase motivations are relatively consistent, though consumers factor price more with the cheddar. In general, purchase motivators among hard cheeses are relatively consistent.

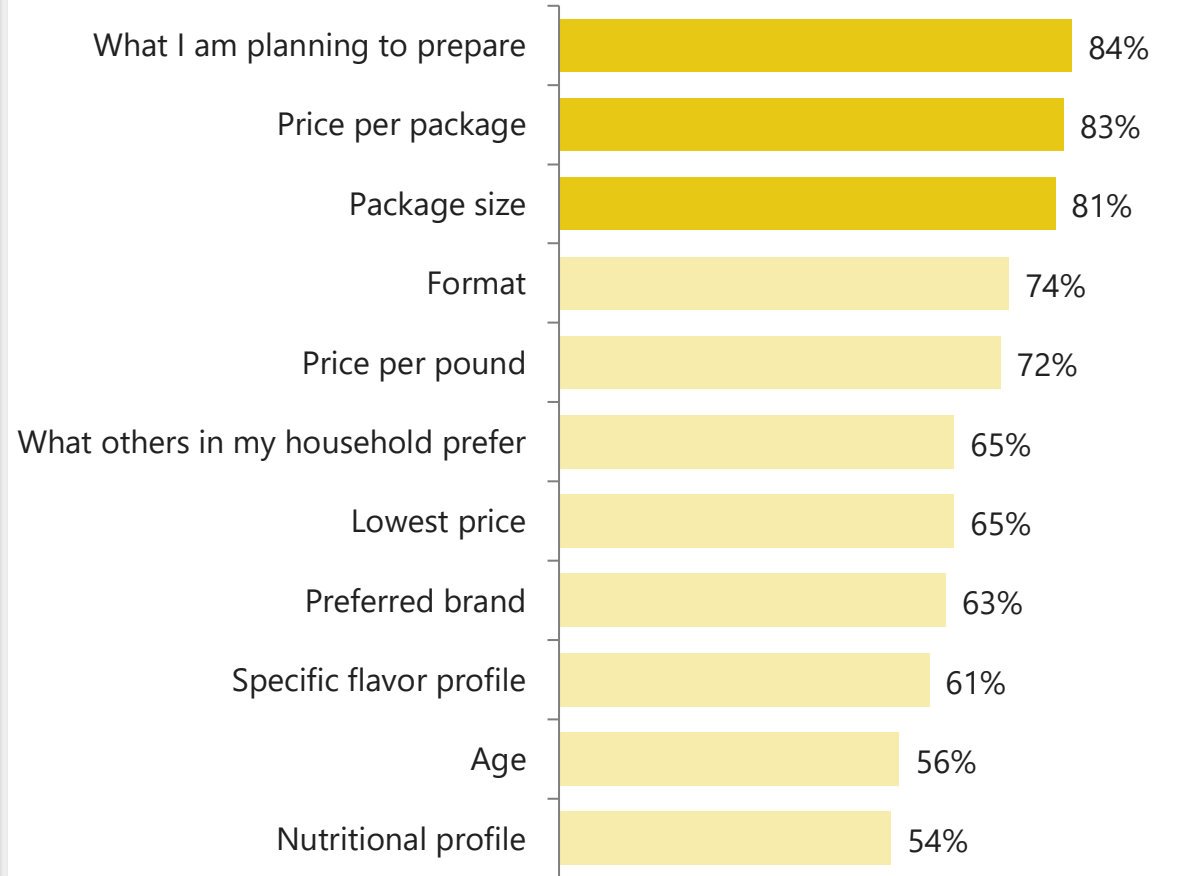
Retail Purchase Motivators - Cheddar

5-pt. scale,
top 2 box

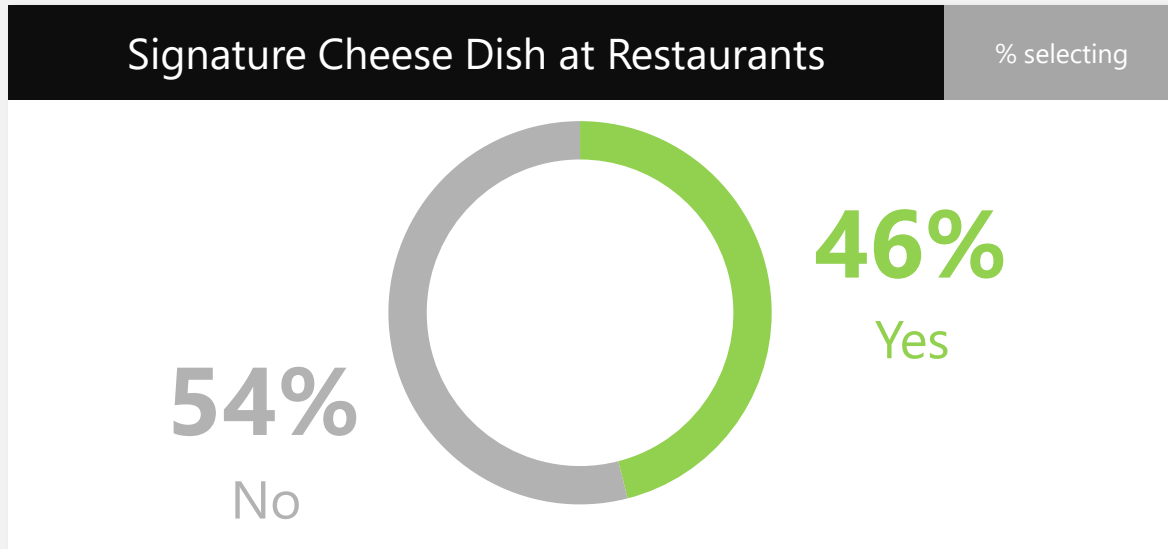


Retail Purchase Motivators - Parmesan

5-pt. scale,
top 2 box



Which signature items with cheese do you look forward to when visiting a restaurant? Select consumer verbatims.



"I really like the cheese sauce that comes with Taco Bell's nacho fries. I realize that it's the same as they use in some of their foods, but I like having the dipping cup of it."

"My local pizza joint uses this amazing blend cheese."

"At Rally's they have a caramel cheesecake stacker [sundae]. It has a lump of cheesecake, caramel ice cream, and nuts."

"At Panera, I like the asiago cheese bagels a lot ."

"I love Another Broken Egg—they have the best grits in the world. It has gouda cheese in it."

"Spinach dip from Cheddar's Scratch Kitchen, with 5 different cheeses and does not have artichokes like others' spinach dip."

"Cheddar bacon king from Burger King, because I'm a big fan of cheddar."

"Steak & Ale's escargot with garlic butter & provolone is delicious & a special treat!"

"I enjoy alfredo pasta at a restaurant near where I live, where the sauce is much thicker and almost meatier than most creams."

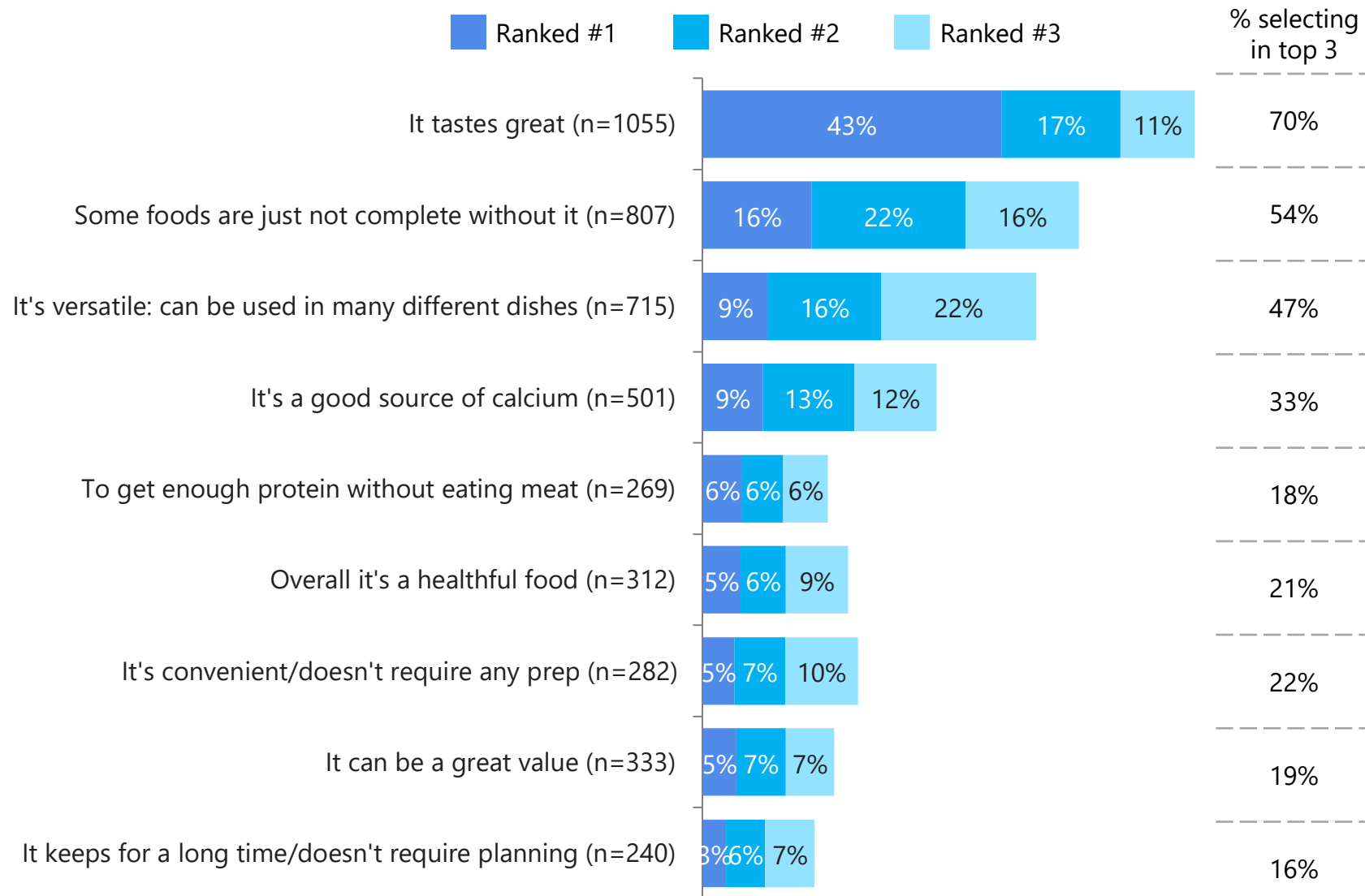
"Mozzarella sticks, omg, they are amazing from Sonic."

Above all, cheese appeals to consumers based on flavor and is considered a must-have ingredient for some dishes.

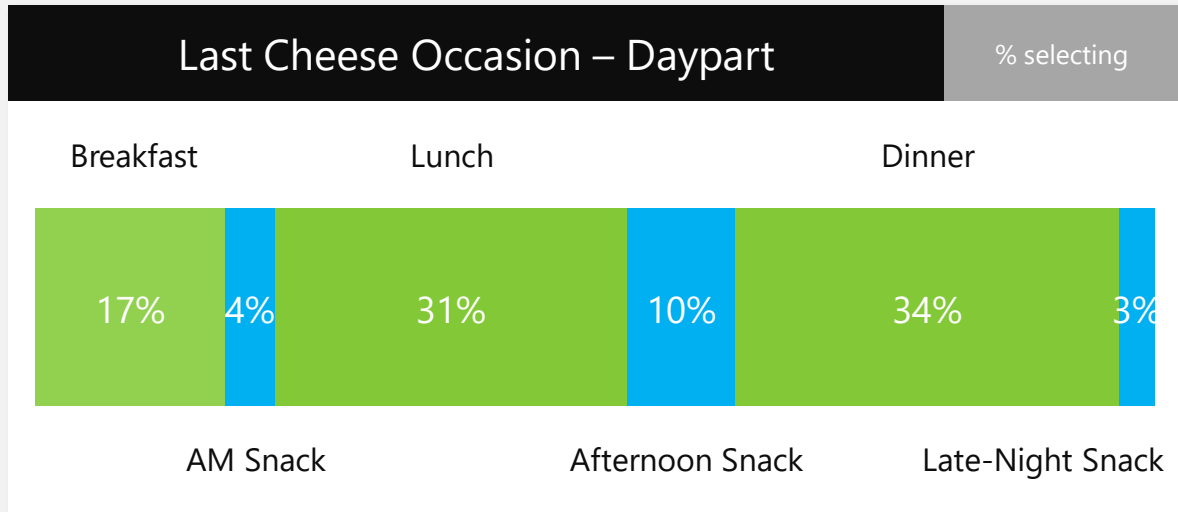
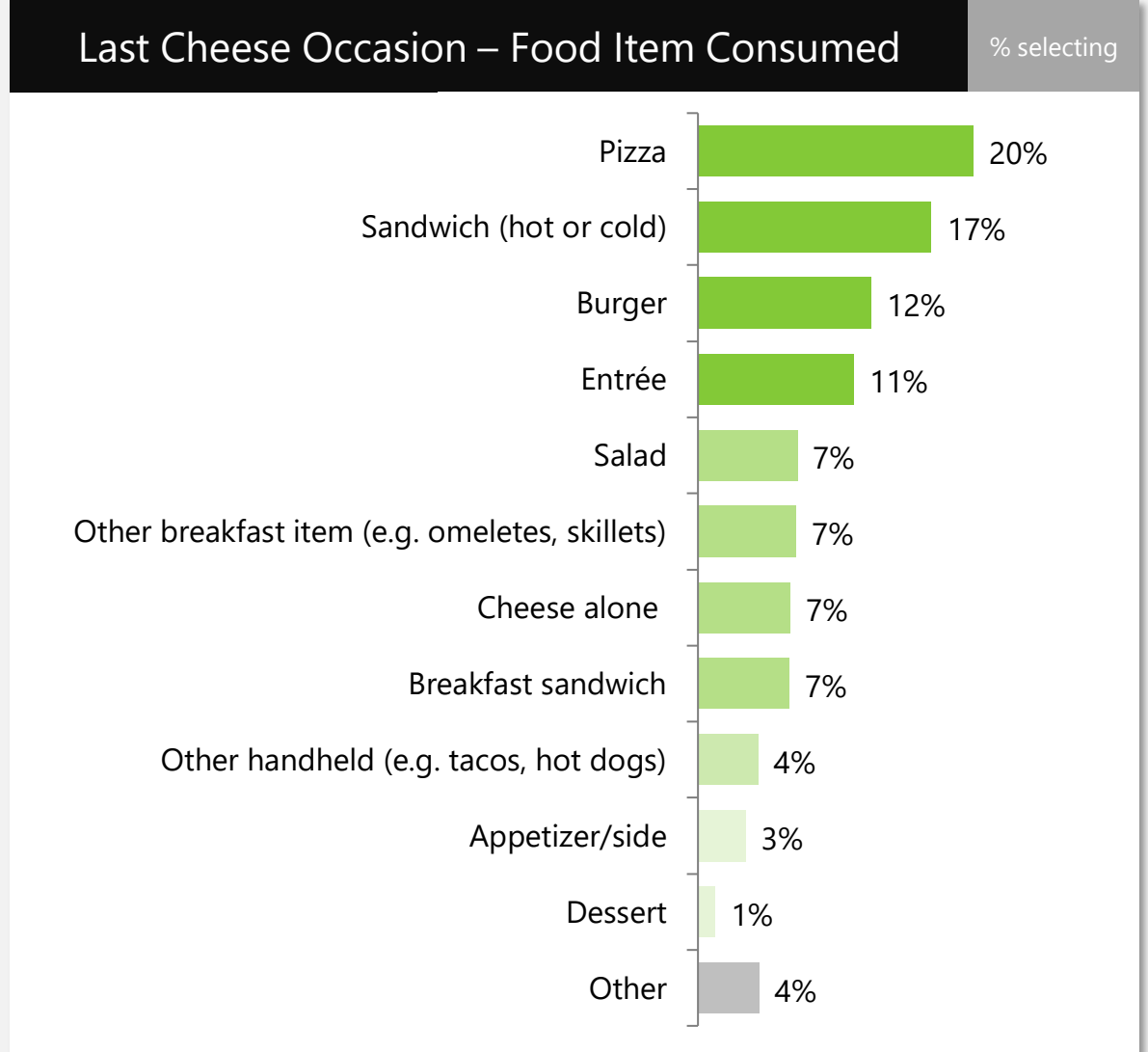
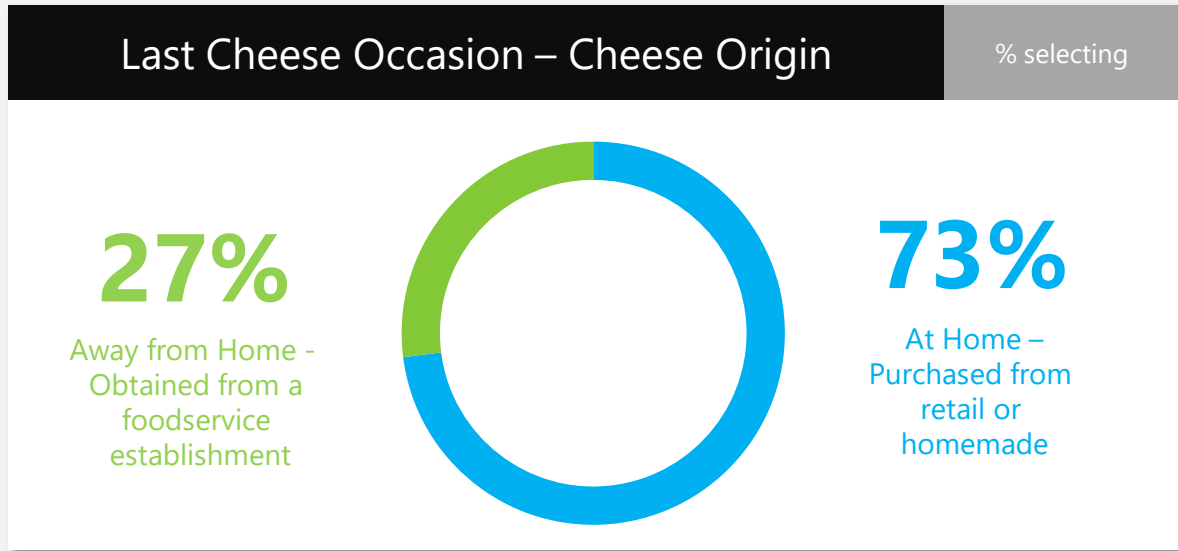
Health or nutrition factors fall much lower as reasons for eating cheese, as does convenience (in relation to ease of use and long shelf life.)

Top Reasons for Eating Cheese

% ranking 1-3



Pizza was the most common carrier for consumers' most recent cheese occasion, closely followed by sandwiches, but overall choices ranged from burgers to dessert. Occasions were split between lunch and dinner; snack times show room for growth.



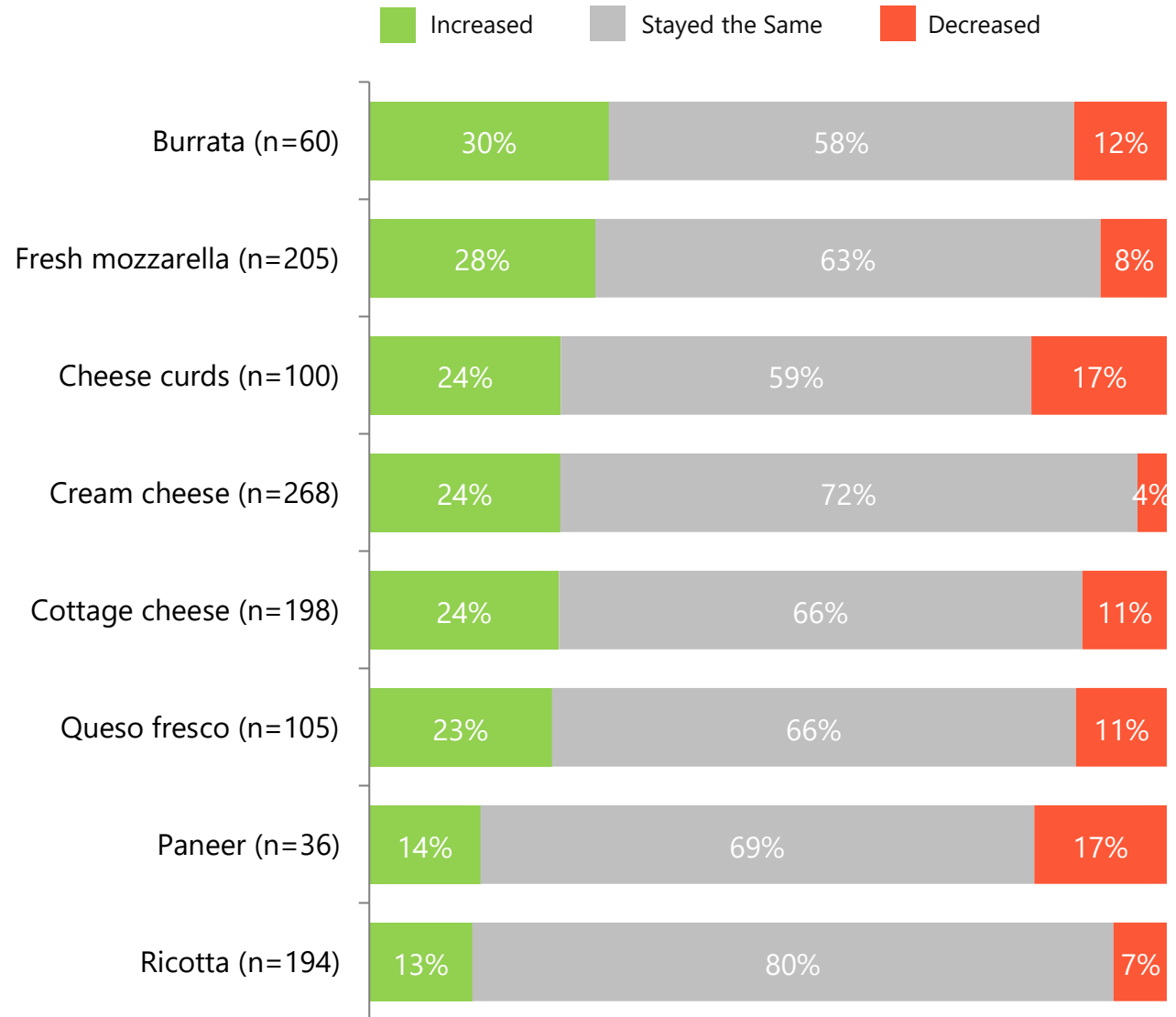
Ordering of dishes featuring fresh cheese is experiencing substantial increases for most operators, although specialty varieties like cheese curds and paneer are slightly less likely to show growth.

Trendy burrata and fresh mozzarella are seeing the greatest increase (although burrata is menued by far fewer operators.)

Operator Finding

Patron Ordering of Fresh Cheeses

% selecting



Consistency and good value are the top reasons operators buy ready-to-use products with cheese; one in four also point to excellent quality. Labor challenges also increase their appeal, with one operator describing the choice as “choosing our battles.”



Other Reasons for Purchasing

“They are **pre-portioned.**”

“We **do not have enough staff.**”

“We can’t prepare 100% of our menu from scratch due to **labor issues** so we have to choose our battles.”

“To **save labor.**”

“**Convenience.**”

Five varieties of cheddar are among the fastest-growing cheeses on burgers, while regular cheddar is available as an option on nearly half of all burgers. Burgers are also a platform for global cheeses like Danish havarti, Dutch smoked gouda, and Mexican queso.

TOP CHEESE VARIETIES ON BURGERS

TOP ranked by penetration				TRENDING ranked by 4-year growth			
	PENETRATION	1-YEAR GROWTH	4-YEAR GROWTH		PENETRATION	1-YEAR GROWTH	4-YEAR GROWTH
Cheddar	46.2%	-	+9%	Pimento Cheese	1.9%	+1%	+73%
American	35.0%	+5%	+14%	Tillamook Cheddar	1.4%	-2%	+65%
Swiss	28.3%	-	-4%	Muenster	1.0%	+5%	+60%
Bleu Cheese	20.2%	+2%	-5%	Havarti	1.2%	+1%	+56%
Pepper Jack	15.5%	+3%	+10%	Fresh Mozzarella	1.4%	-5%	+52%
Mozzarella	9.5%	+1%	-	White Cheddar	4.1%	+12%	+51%
Provolone	9.0%	-3%	-9%	Smoked Gouda	2.8%	+9%	+47%
Monterey Jack	4.2%	-8%	-11%	Smoked Cheddar	1.3%	-8%	+41%
White Cheddar	4.1%	+12%	+51%	Queso	2.4%	+20%	+27%
Feta	3.9%	-6%	-2%	American	35.0%	+5%	+14%
Smoked Gouda	2.8%	+9%	+47%	Aged Cheddar	2.3%	-15%	+13%
Parmesan	2.5%	-2%	-24%	Pepper Jack	15.5%	+3%	+10%
Queso	2.4%	+20%	+27%	Vermont Cheddar	1.1%	+5%	+9%
Gorgonzola	2.4%	-13%	-7%	Gruyere	2.2%	-1%	+6%
Gruyere	2.2%	-1%	+6%				

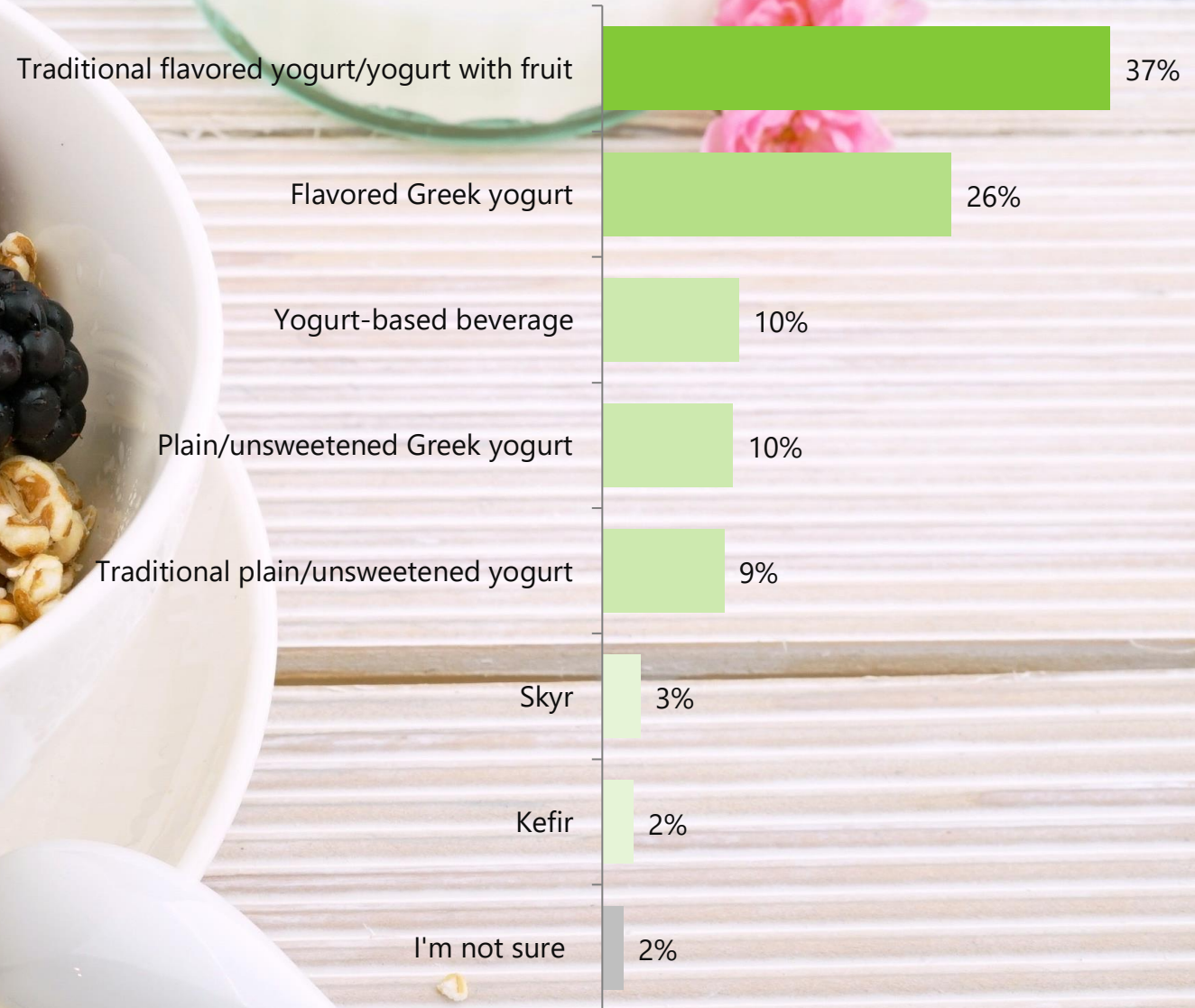
Smoked cheese paired with popular proteins such as bacon, brisket, or shrimp appeal to consumers. Atypical combinations, such as breadsticks with bacon or mac and cheese with lobster, score very high in terms of their uniqueness.



SMOKED CHEESE					ranked by purchase intent	
DATE	CHAIN	ITEM	DESCRIPTION	PURCHASE INTENT	UNIQUE	
Sep 2019	Subway	Naturally Pit-Smoked Brisket Sandwich	Brisket that's naturally slow smoked for at least 13 hours topped with smoked Cheddar cheese and zesty barbecue sauce — our Pit-Smoked Brisket sandwich packs layer after layer of delicious smoky flavor on our signature Italian bread.	96	57	
Oct 2019	Fazoli's	Smoky Bacon Breadsticks	This snack is a cheesy pull-apart pizza made from our famous breadsticks! It starts with our garlic-buttery breadsticks. We serve it with a delicious cheese sauce made with smoked Gouda . Gouda is a Dutch cheese named after the city, Gouda, in the Netherlands. We use smoked Gouda to prepare our Smoky Bacon Breadsticks. Smoked gouda is known for its edible brown rind, creamy yellow interior, and smoky flavor.	95	95	
Nov 2019	Olive Garden	Smoked Mozzarella Shrimp Rigatoni	Shrimp, smoked mozzarella , and toasted breadcrumbs with rigatoni pasta baked in creamy seafood alfredo with spinach.	95	81	
May 2019	Schlotsky's	Chicken Bacon Smokecheesy	Shaved chicken, bacon, smoked Cheddar , chipotle mayo, red onions, lettuce and tomatoes on sourdough bun.	92	52	
Apr 2019	Panera Bread	Maple Bacon, Egg & Cheese Wrap	Bacon glazed with sweet maple, scrambled egg, smoked gouda cheese , salt and pepper in a whole-grain wrap.	79	88	
Mar 2019	Ledo Pizza	Greek Calzone	Tzatziki sauce with roasted grape tomatoes, carved gyro meat, smoked provolone and feta cheese.	77	67	
Jan 2019	Ninety Nine Restaurant & Pub	Baked Lobster Mac & Cheese	A comforting classic. Cavatappi noodles tossed with smoked gouda cheese sauce , Parmesan cheese and crowned with North Atlantic lobster meat and seasoned crumbs. Oven-baked to perfection.	75	94	



Variety of Last Yogurt Occasion

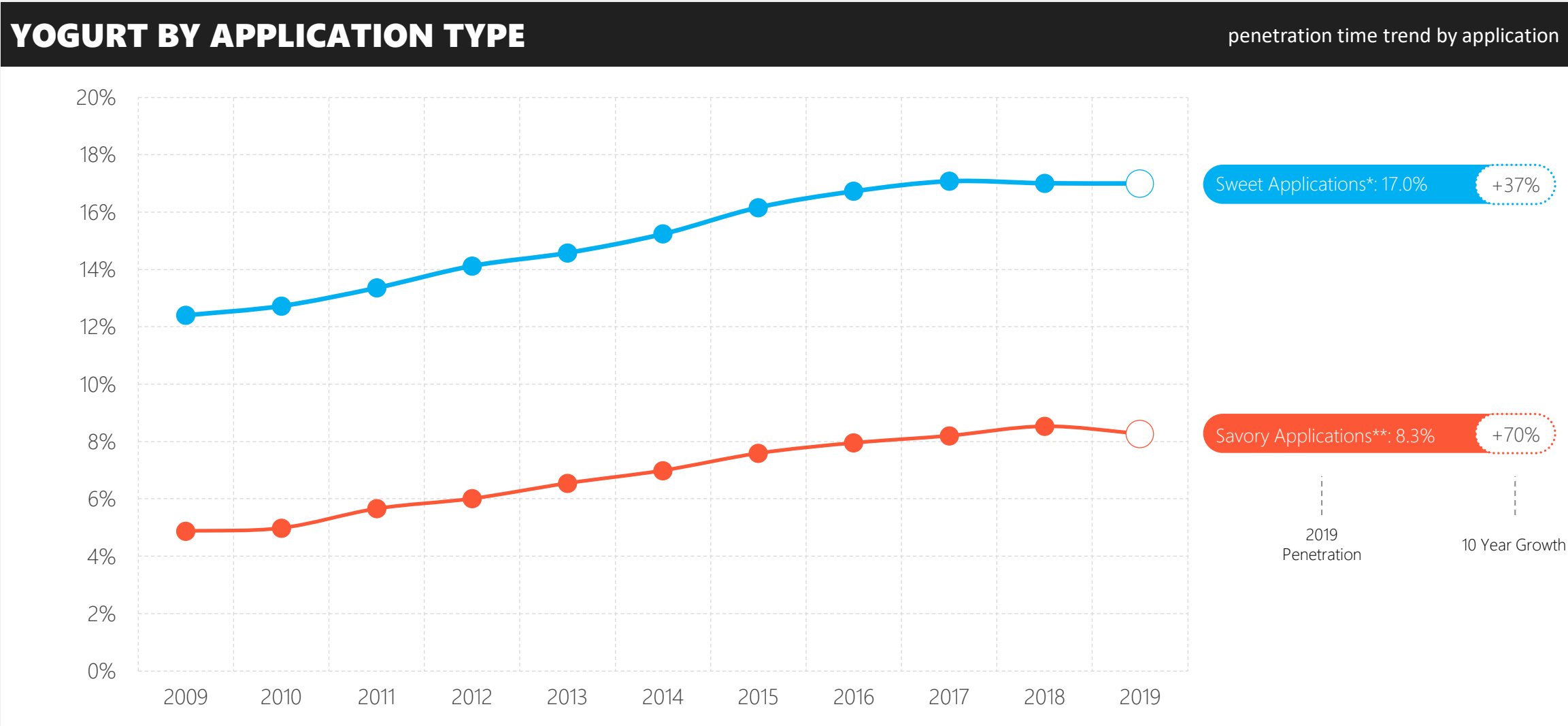


Single-flavor case packs are the most common format purchased, but more variety could drive sales, especially during well-established breakfast routines for consumers who otherwise might get bored. Bulk sales are secondary except for plain Greek yogurt and traditional/plain varieties.

Operator Finding

	Operator Yogurt Purchases by Format		% selecting	
	Single-flavor cases of individual servings	Multi-flavor cases of individual servings	Bulk tubs/containers	Bulk pouches
Traditional flavored yogurt	56%	34%	33%	8%
Flavored Greek yogurt	55%	30%	24%	3%
Yogurt-based beverages	42%	25%	29%	8%
Kefir	37%	37%	22%	11%
Plain Greek yogurt	33%	16%	60%	4%
Skyr (Icelandic yogurt)	32%	45%	23%	5%
Traditional plain/unsweetened yogurt	27%	10%	66%	10%

Yogurt used in savory applications has experienced nearly double the long-term growth of that for yogurt found in sweet applications. Menu growth for both has remained relatively flat since 2016.



*includes traditional yogurt applications like parfaits, fruit with yogurt, standard sides of yogurt such as Greek Yogurt, smoothies, and desserts. **includes savory yogurt applications such as tzatziki and raita.

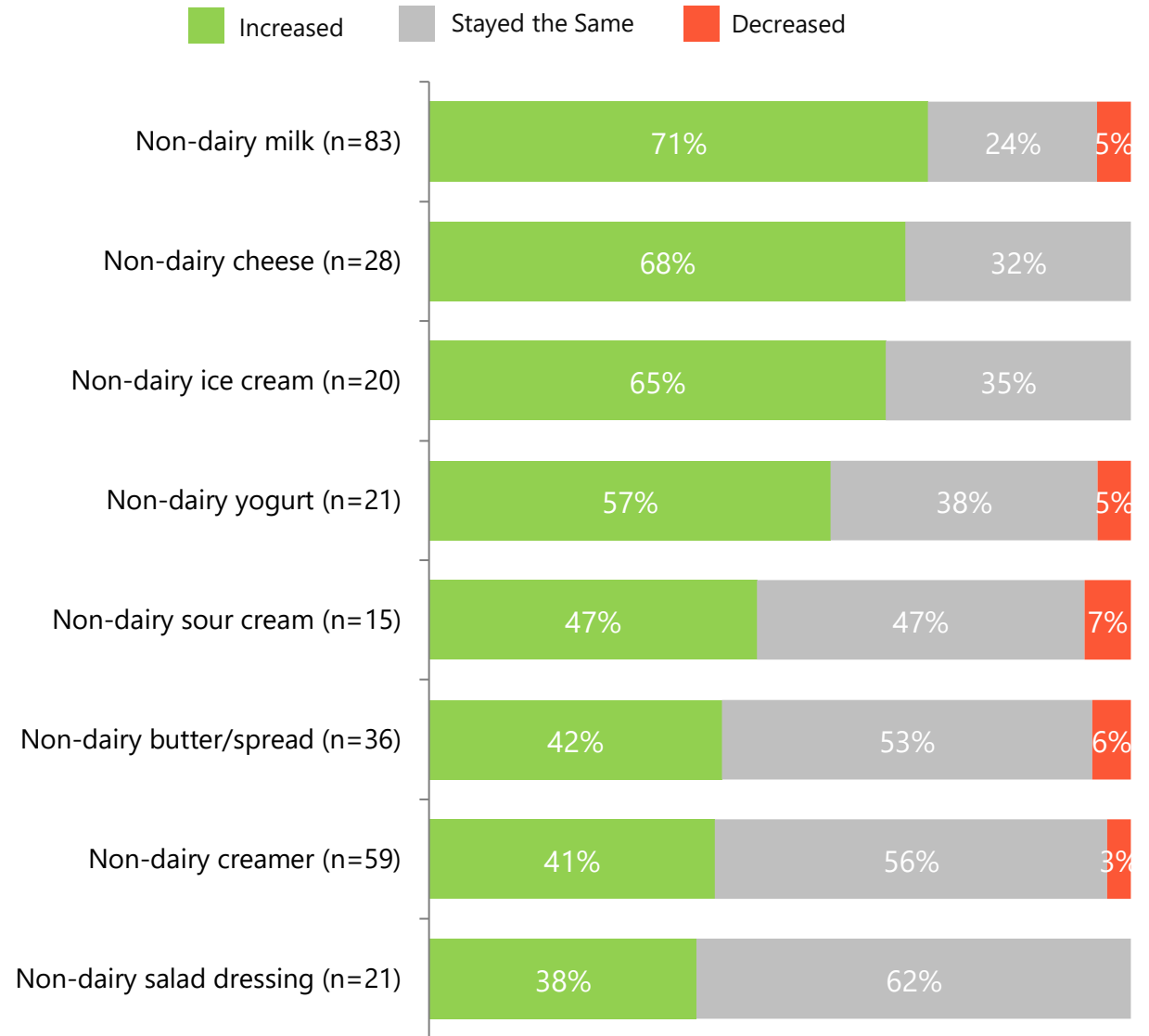
Not only have operators embraced non-dairy milks, a full three-quarters of them say their purchasing is increasing.

(Other categories show similar upticks, although users comprise a small base that renders those findings as directional.)

Operator Change in Non-Dairy Alternative Usage over the Past Year

% selecting

Operator Finding



Again, likely due to the versatility of the main variety, half of operators say butter and related products are important to the front and back of the house equally.

Operator Finding



32% say Back of the House

14% say Front of the House

52% say they matter equally to FOH and BOH

appendix: 1

demographics

1,508 consumers

Gender



51%

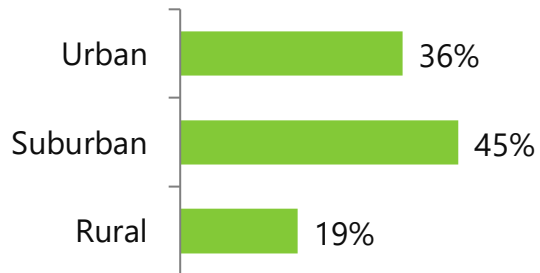


48%

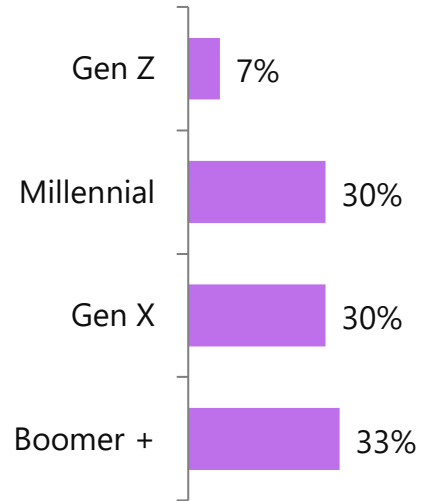
Ethnicity

White	50%
Black	21%
Hispanic	17%
Asian	6%
Other	6%

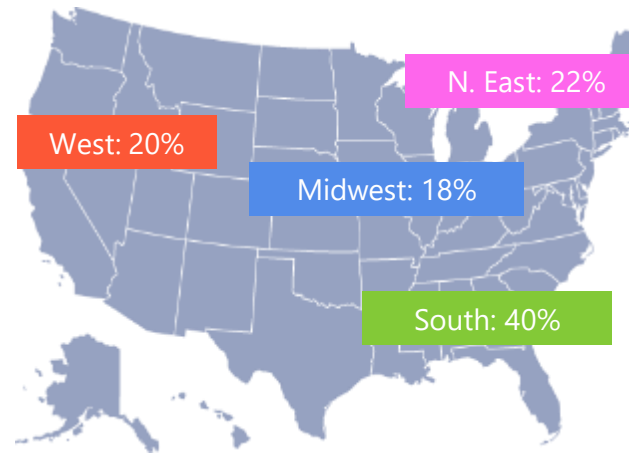
Area Type



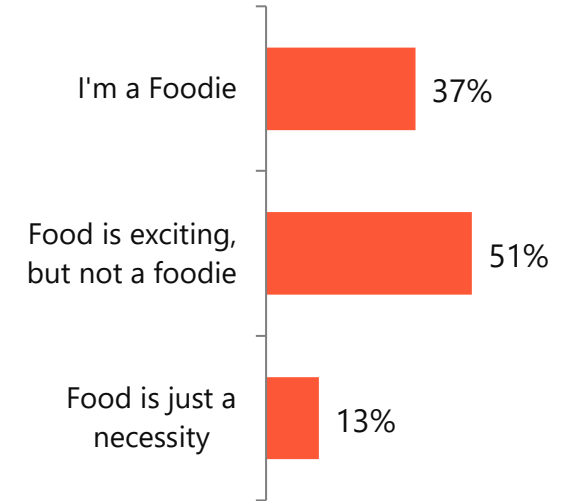
Age



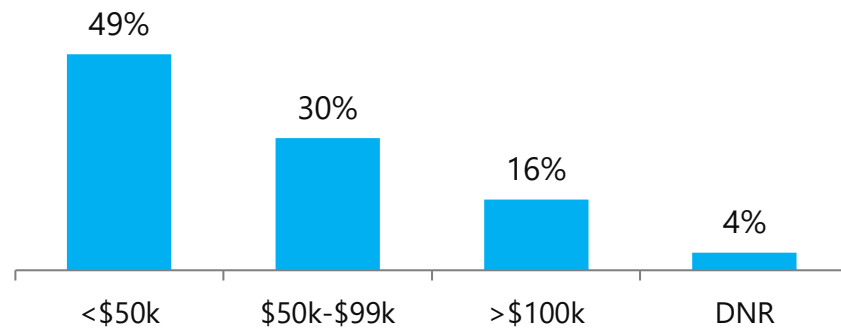
Region



Food Attitudes



Household Income



Employment



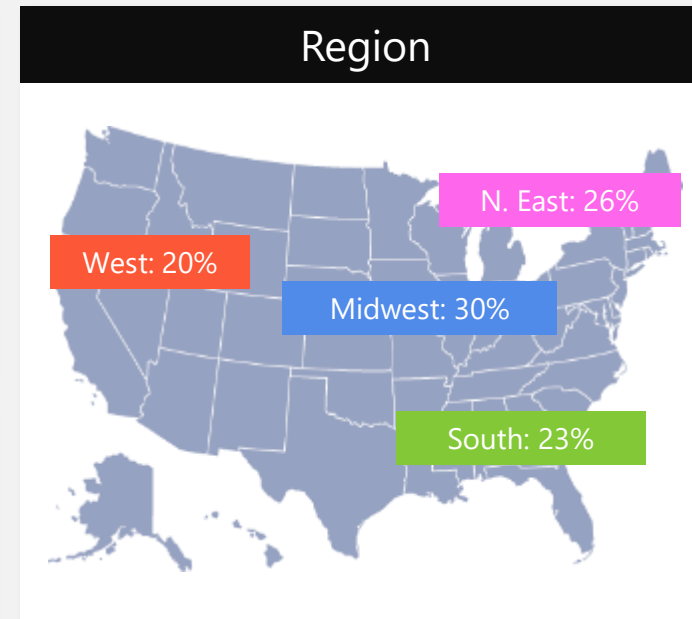
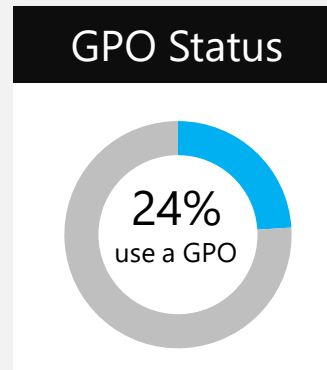
37%
have children in their household

8% are full-time students

5% are part-time students

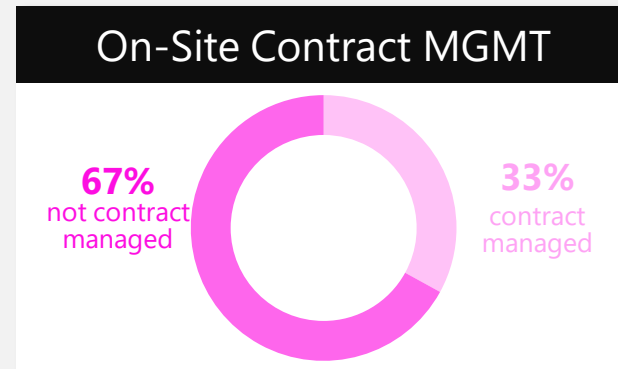
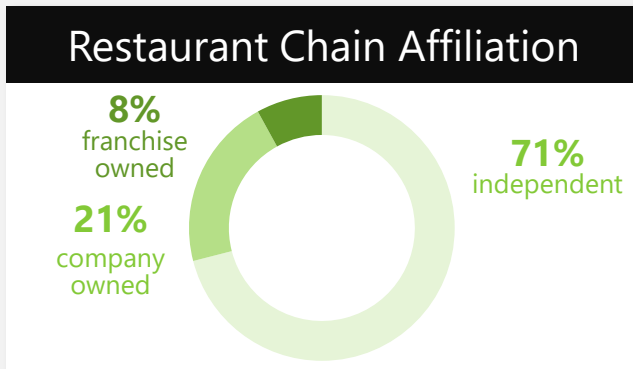
317 operators

Segment					
47% Restaurant		42% On-Site		11% Retail	
QSR	4%	Corporate	9%	Supermarket	5%
Fast Casual	9%	C&U	9%	C-Store	6%
Midscale	13%	Healthcare	8%		
Casual	14%	K-12	9%		
Fine Dining	7%	Lodging	8%		



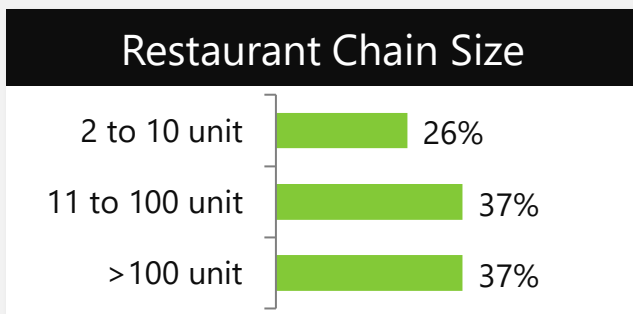
Distributor

Sysco	38%
U.S. Foods	21%
Gordon	9%
Cash and Carry	5%
PFG	5%
Other	22%



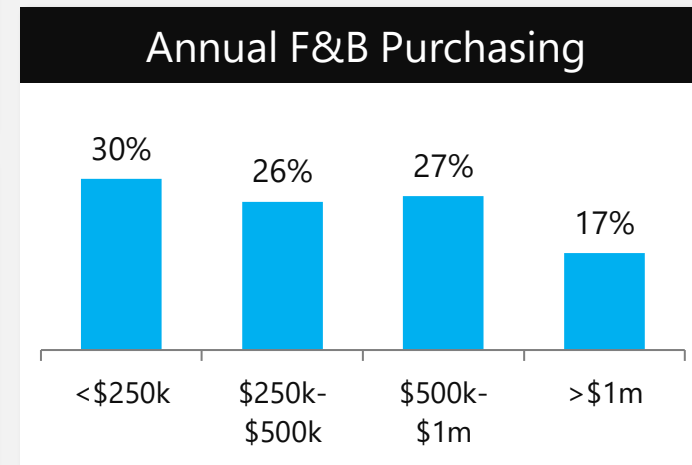
Job Title

Owner/Operator	28%
General Manager	22%
Manager	15%
F&B Director	13%
Exec. Chef/Chef	11%
Other	11%



Contract MGRs Used

Sodexo	32%
Aramark	25%
Compass	25%
Other	18%



Skill Level

All/Almost All Scratch	12%
Majority Scratch	33%
Half Scratch/ Half Pre-Made	44%
All/Almost All Pre-Made	10%

appendix: 2

exhibit guide

exhibit guide

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exhibit guide

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