The Thinking House

BORD BIA INSIGHT CENTRE

Shopper Insight Study

Cheese

June 2018

Our Cheddar Study

Setting the scene

Methodology and approach

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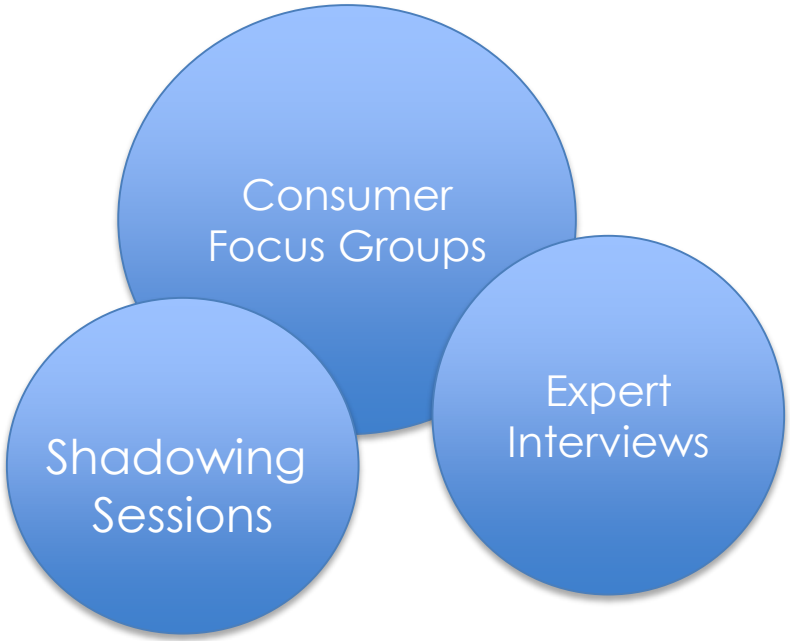
Research Methodology

Fieldwork was conducted from 08th – 16th May 2018

N=1023 nationally representative Cheddar cheese buyers

Quantitative



Qualitative


Cheese is loved by all.
45% of people say “they couldn’t live without it”

Frequency of Weekly+ personally consuming food categories

Base All adults aged 18+ - 1,000

Almost three quarters of respondents consume Cheddar Cheese on a weekly+ basis

72%

(14% daily users)





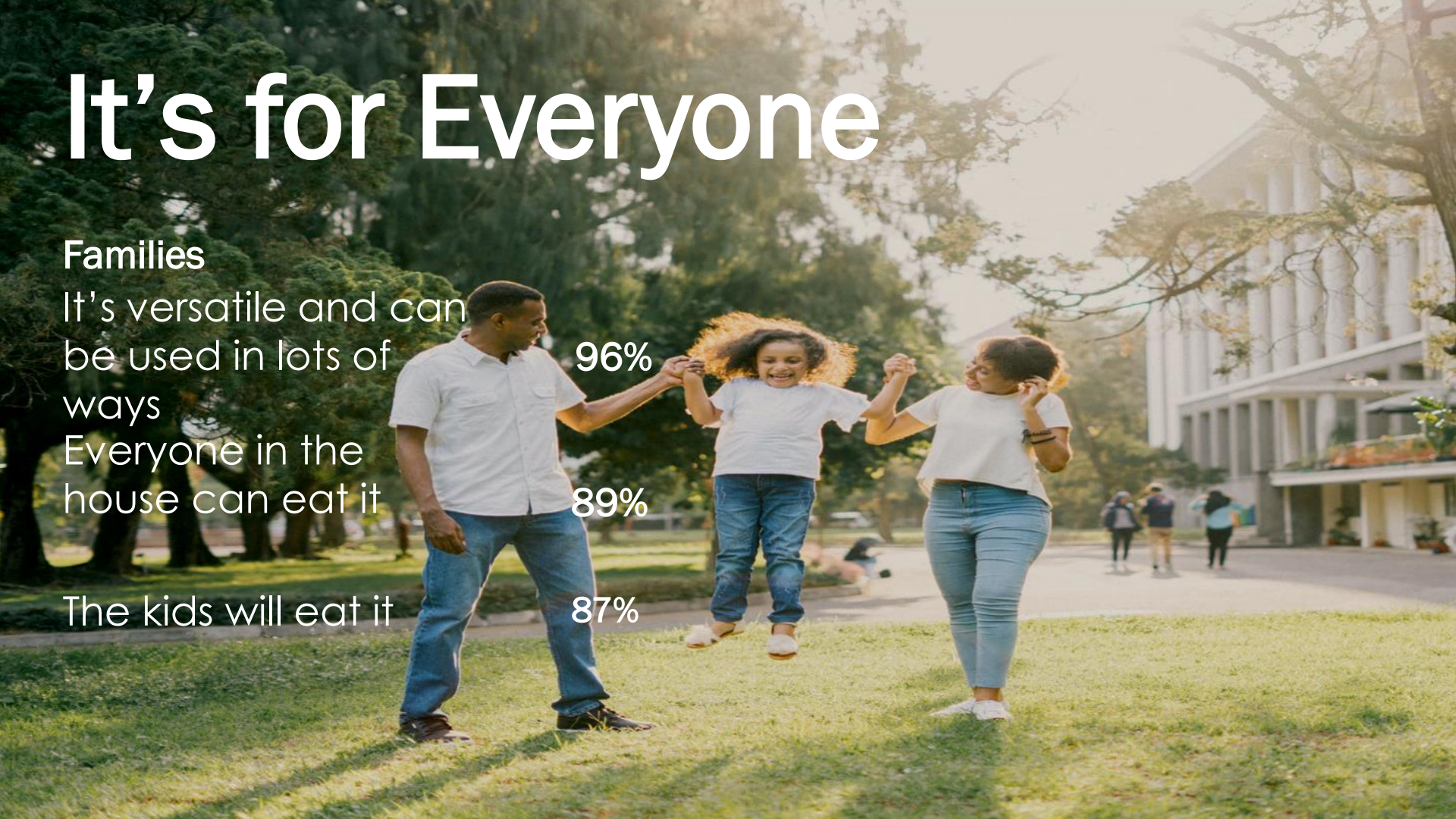
3.43 million people consume cheddar on a weekly basis

CAPI omnibus (F2F) in March 2018.
N-1000 Adults aged 16+

It’s Full of Goodness

Healthy & Nutritious	Natural Food	High Protein	Sugar Free
85%	*84%*	*84%*	*63%*

It’s for Everyone



Families

It’s versatile and can be used in lots of ways — 96%

Everyone in the house can eat it — 89%

The kids will eat it — 87%

..and it tastes great



It’s great value



85% See it as a relatively low cost food

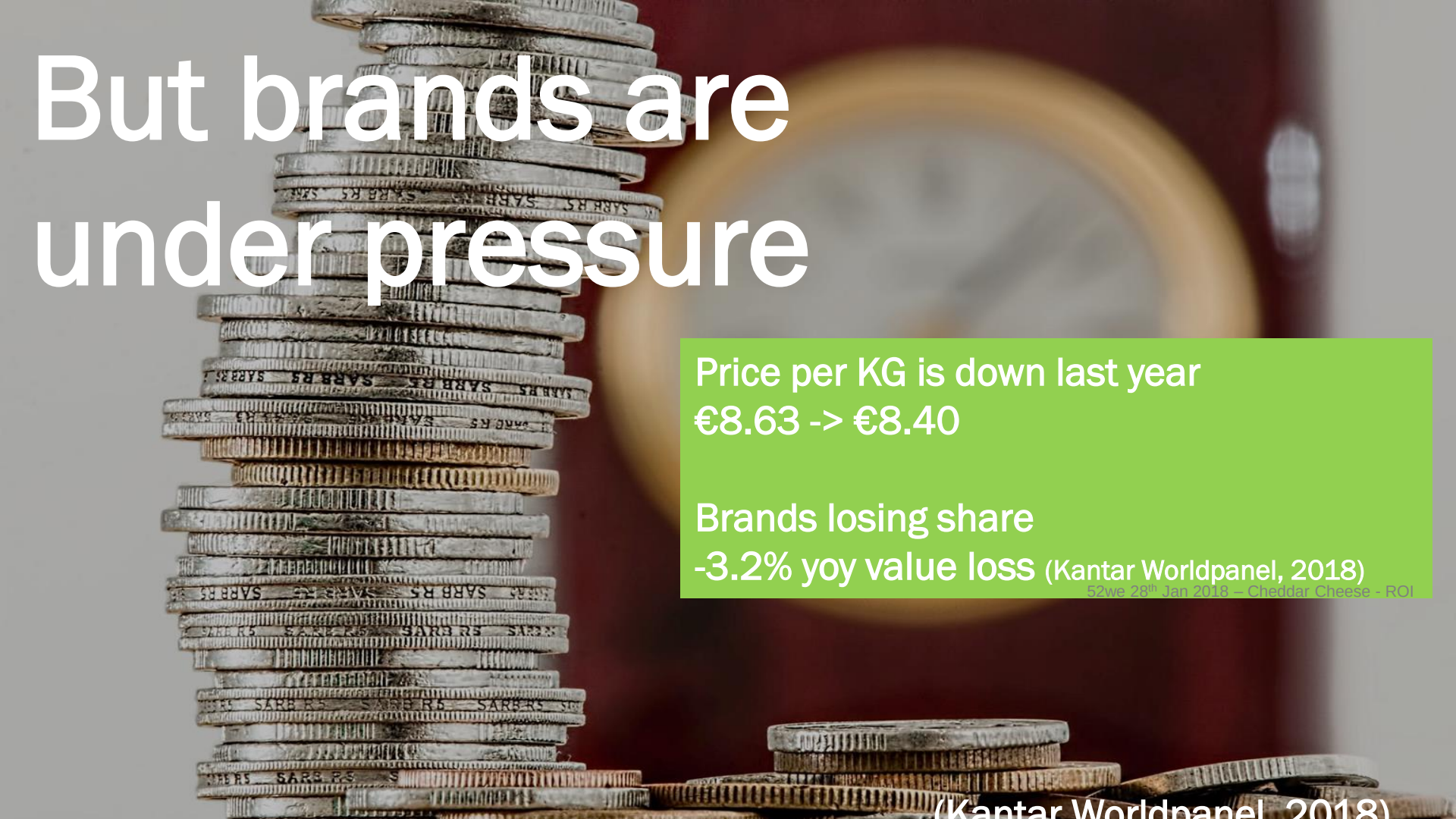
53% Always look for best price and switch brands based on offers

Source: Kantar

Life is better with cheddar

However…

But brands are under pressure



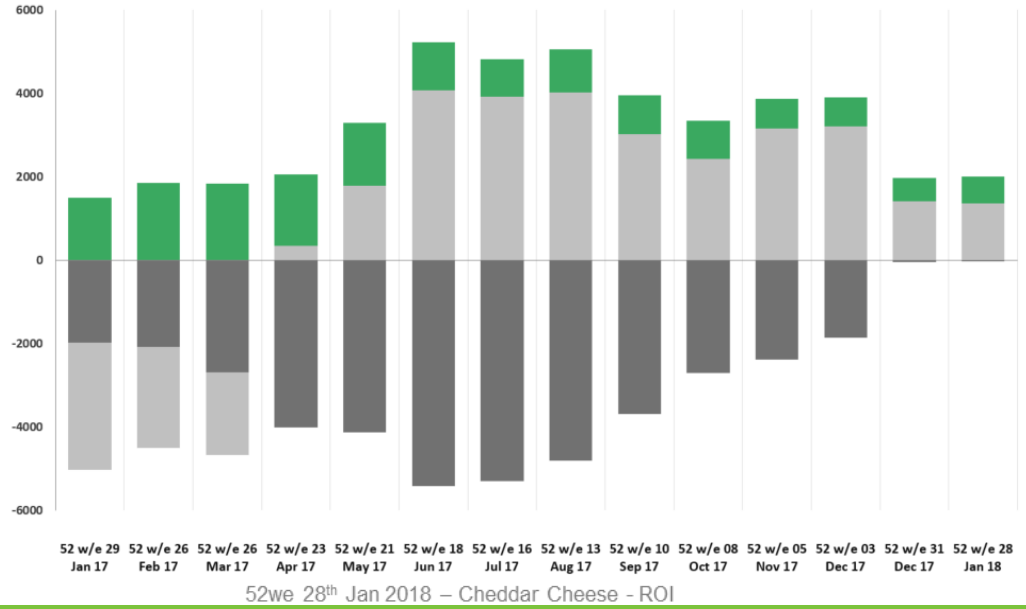
Price per KG is down last year
€8.63 -> €8.40

Brands losing share
-3.2% yoy value loss (Kantar Worldpanel, 2018)

(Kantar Worldpanel, 2018)

63% of the market is private label and this is growing year on year valued at €67.6 mn and growing at 6.8%

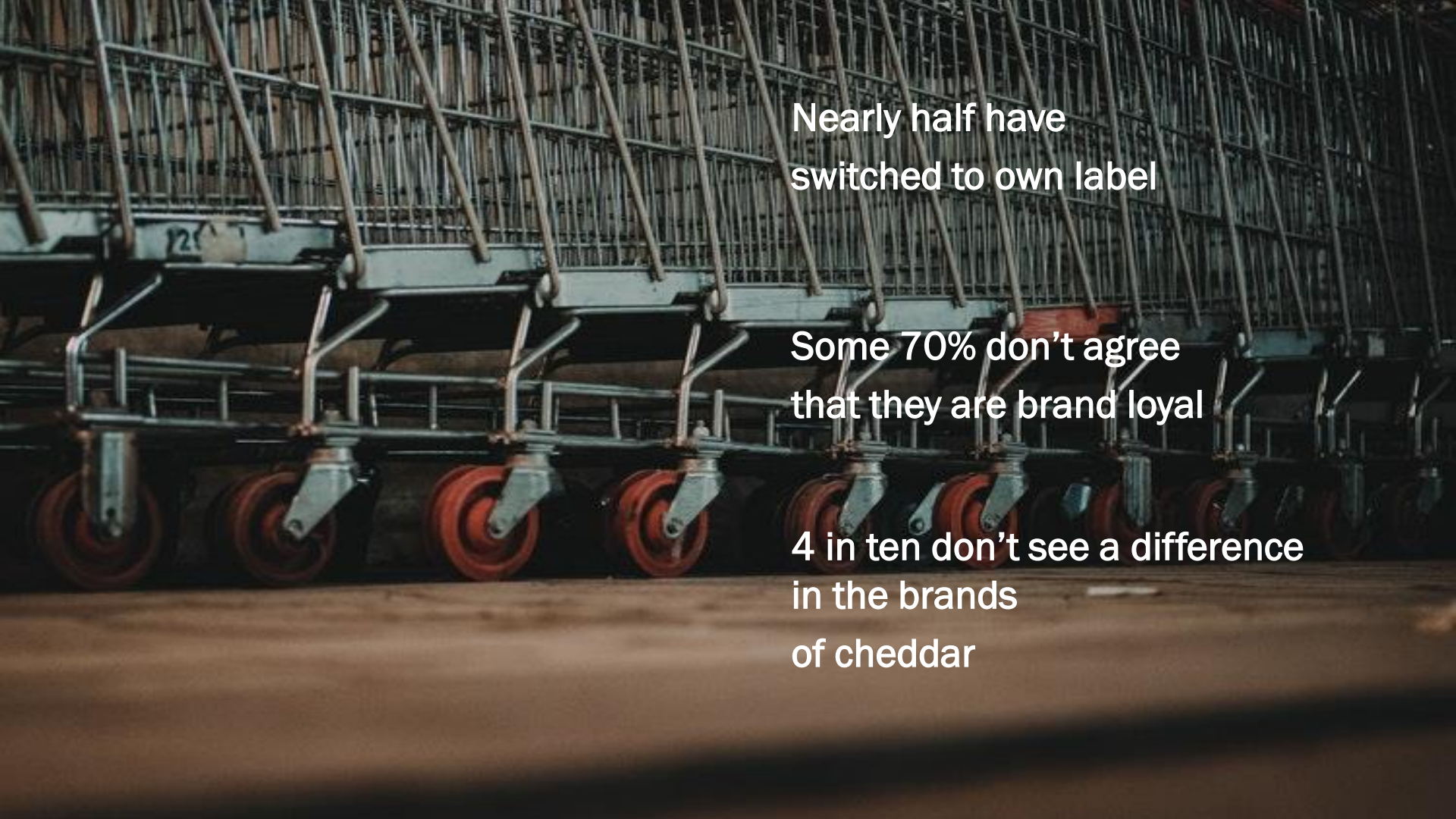
Through 2017 and early 2018, all sales growth in cheddar category came from promotion sales;



52we 28th Jan 2018 – Cheddar Cheese - ROI

(Kantar Worldpanel, 2018)

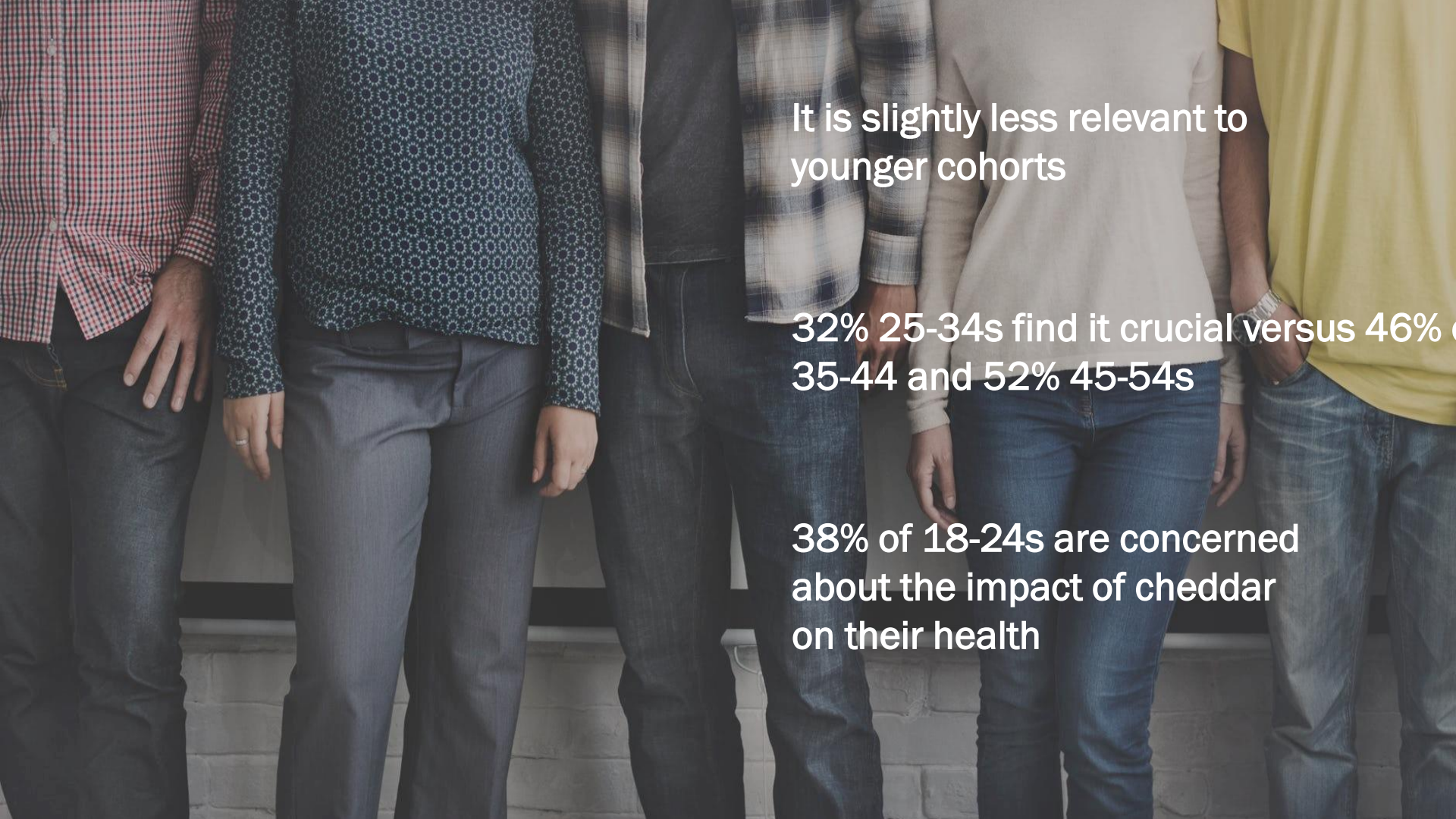

An aisle of
yellow stickers



Nearly half have
switched to own label

Some 70% don’t agree
that they are brand loyal

4 in ten don’t see a difference
in the brands
of cheddar

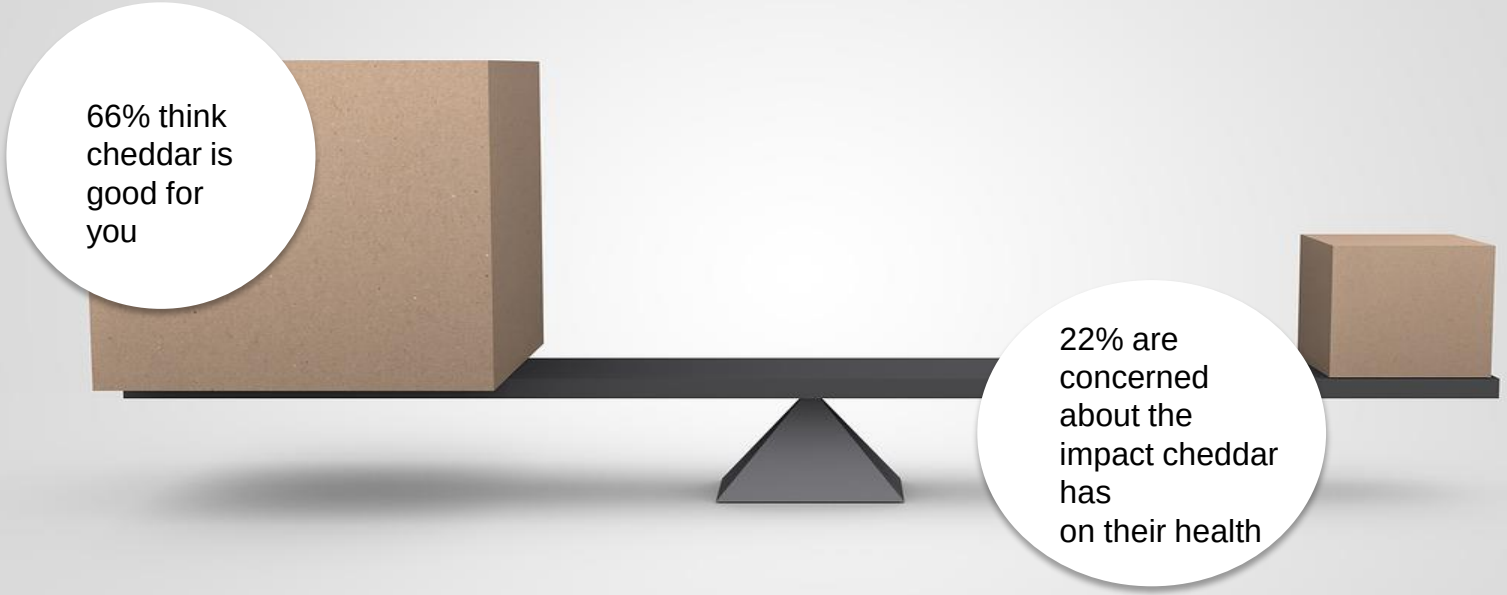


It is slightly less relevant to younger cohorts

32% 25-34s find it crucial versus 46% 35-44 and 52% 45-54s

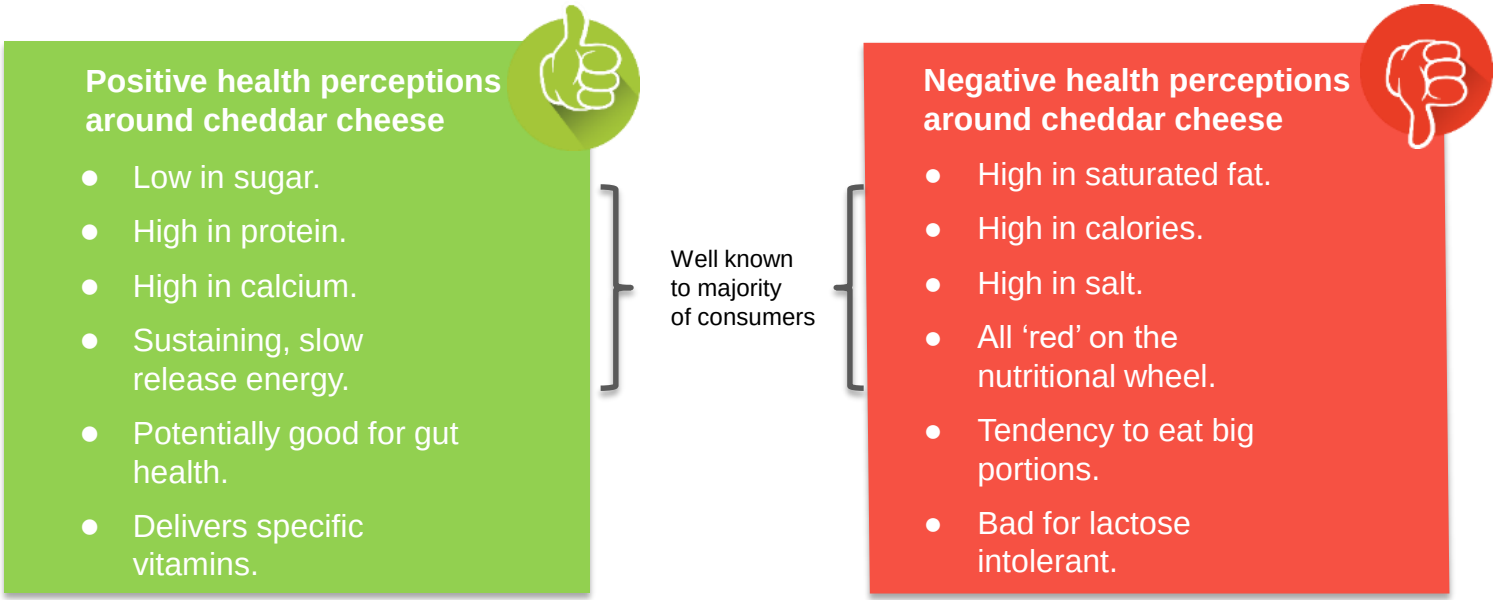
38% of 18-24s are concerned about the impact of cheddar on their health

Watch it on the health concerns



However cheddar benefits could be more clearly communicated especially with younger people

Conflicting health messages have caused a lot of confusion for consumers.
Fat is not longer the enemy, but the jury is still out on saturated fat.



And so We Need to I.N.V.I.G.O.R.A.T.E

Cheese in Action

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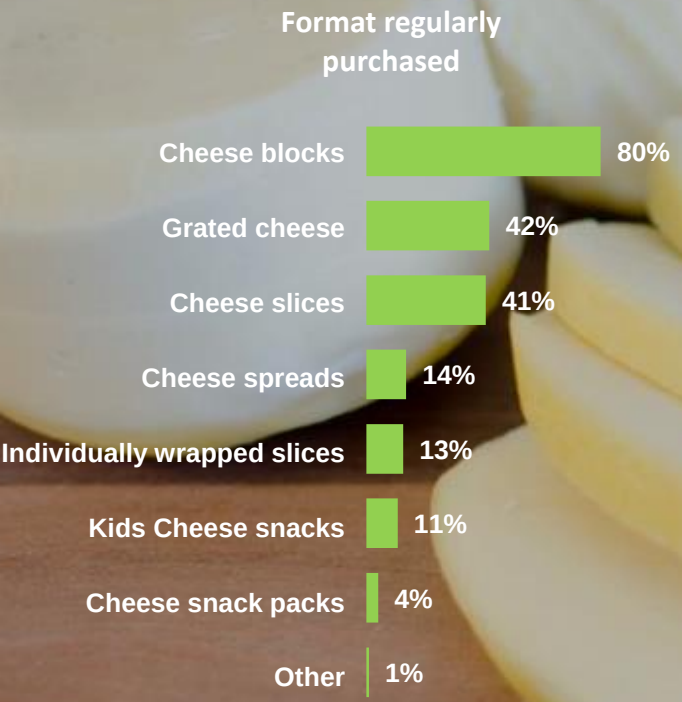
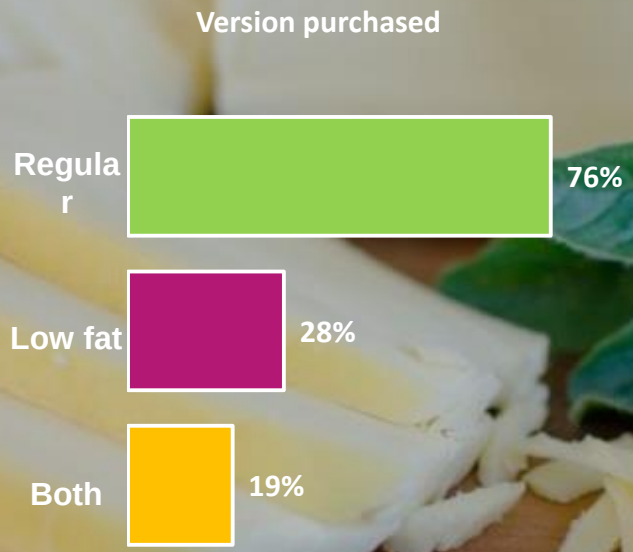
Overview of Type of Cheddar Cheese Being Purchased

(Base: All cheddar cheese monthly + buyers n=1,023)



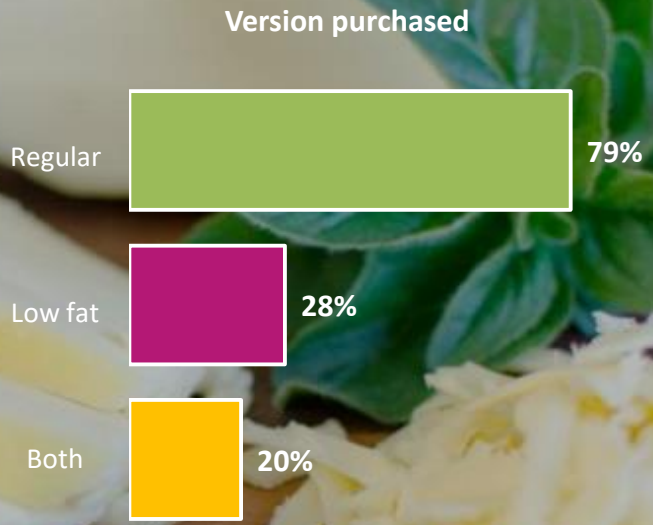


When it comes to the format in which cheddar cheese is regularly purchased, 8 in 10 buy blocks, with just over 2 in 5 (42%) opting for grated, and 41% buying sliced. Regular cheddar is the most preferred. Some 3 in 5 claim to be consuming cheddar themselves, with just over 4 in 10 (41%) claiming all members of their household consume.

Overview of Type of Cheddar Cheese Being Purchased

(Base: All cheddar cheese monthly + buyers with dep kids n=395)





Amongst those with dependent children in the household, there is a greater prevalence of grated, sliced and kids cheese snacks being purchased. However, the version purchased is in line with overall category incidence.

7 in 8 are buying another type of cheese with cheddar

(Base: All cheddar cheese monthly + buyers n=1,023)

Which, if any, of the following types of cheese do you also buy regularly?

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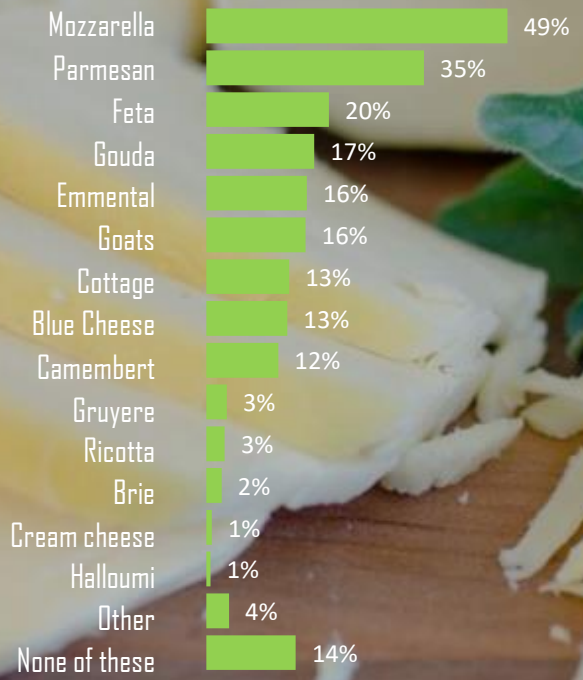


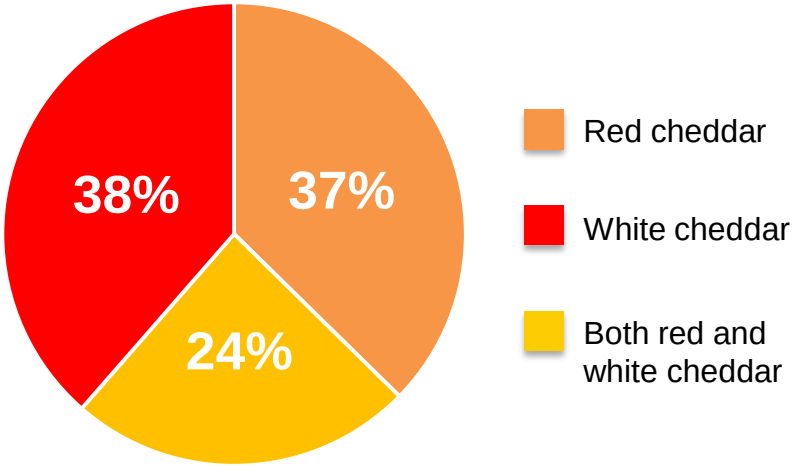
Mozzarella is the most likely other type of cheese purchased by cheddar cheese buyers, with those aged under 44 significantly more likely to be purchasing this type of cheese.

“*You know, I don’t think I’ve ever really thought about it. We’ve always been a red cheese house and that’s what we buy. If we’re out somewhere, my daughter will only eat red. She doesn’t touch the white stuff.*”

Younger family, Dunnes/SuperValu/Tesco shopper.

Colour is a matter of personal preference or long standing habit. Young kids often being more vocal in their preference.

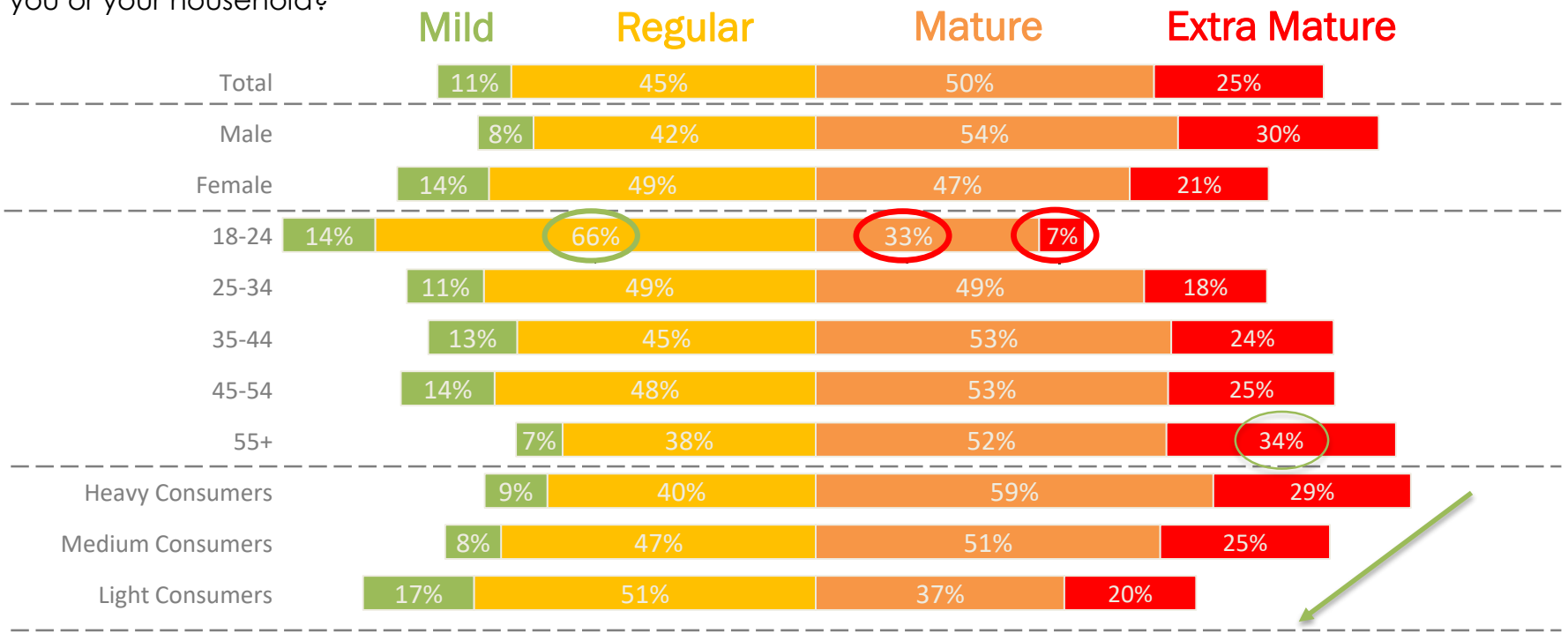
When you are purchasing cheddar cheese do you typically purchase?



Extra mature and mature most popular except with 18-24s

What strength of cheddar cheese do you typically purchase when you are purchasing cheddar cheese for you or your household?

(Base: All cheddar cheese monthly + buyers n=1,023)



The overall preference amongst buyers is for mature/extra mature strength cheddar cheese, although those aged 18-24 are more likely to prefer regular strength cheddar.

Significant difference @ 95% confidence level

Cheese in Store

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The Language Can be Confusing

Lack of clarity around the different terminology in the category as it stands

“Extra” and “fully” for example don’t really help people understand what people are buying into in terms of flavor.





The semiotics of the category are “samey”, unexciting and perhaps lack some authenticity

Local provenance Ubiquity

Traditional processes in a mass brand culture

Irishness lacking relevance to today

Very little difference between stores

They mimic the semiotics of the cheddar category well & have fantastic value

Best cheddar presentation credentials

Flagship store evolution with new high quality own label and Sheridans instore

More noted for artisan and different cheddar offerings

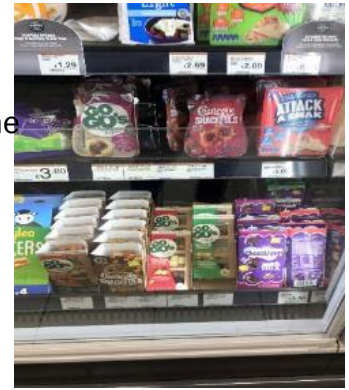


It’s all about the €2 euro offering!

There is not enough attention being drawn at fixture to the innovation that is out there!!

Poor positioning

Of snacking products beside kids is sending the wrong message about their health/ goodness credentials.



Cubed formats

Getting lost in a sea of grated options, undermining its position as a unique format.



High protein options

Generally not enough skus to stand out.

Flavoured options

Do have good standout on shelf, but may need more in the way of tasting to persuade consumers to give them a go.



Vegan cheese

Usually tucked away in a corner, exacerbating impression that it is not ‘real’ cheese.



Cheddar Merchandising needs to work harder



Thing is the Lidl cheese is \as good as any other. There's nothing that you'd want that you can't get there. And it's cheaper.
So why wouldn't you buy it there?

Younger family, Dunnes/SuperValu/ Tesco shopper

I'm always distracted by the other cheese when I'm in Tesco; the manchego and the blue stuff and the camembert. The cheddar I get because I have to.

Older family, Lidl/Aldi shopper

Could habit breed contempt?

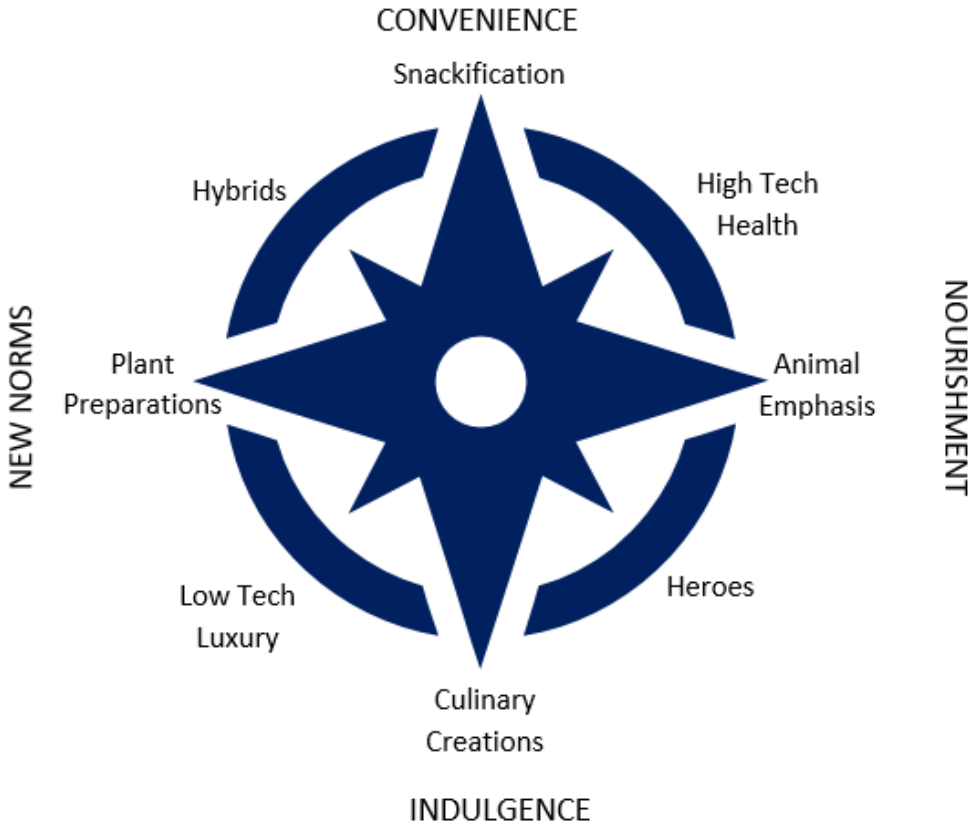
While 76% think the shop is fine as is..

56% of people just go for what's on offer and also just grab and go

While over half do like to browse **63% say they would like to see some new ideas in cheddar**



Introducing
The Cheese Compass



Convenience:
Snackification



Image source: [Cheese Pop]

Indulgence:
Culinary Creations



Image by Jakok Kapusnak on FoodiesFeed

Nourishment:
High Tech Health



Image by Mintel on GNPD

New Norms:

Low Tech Luxury

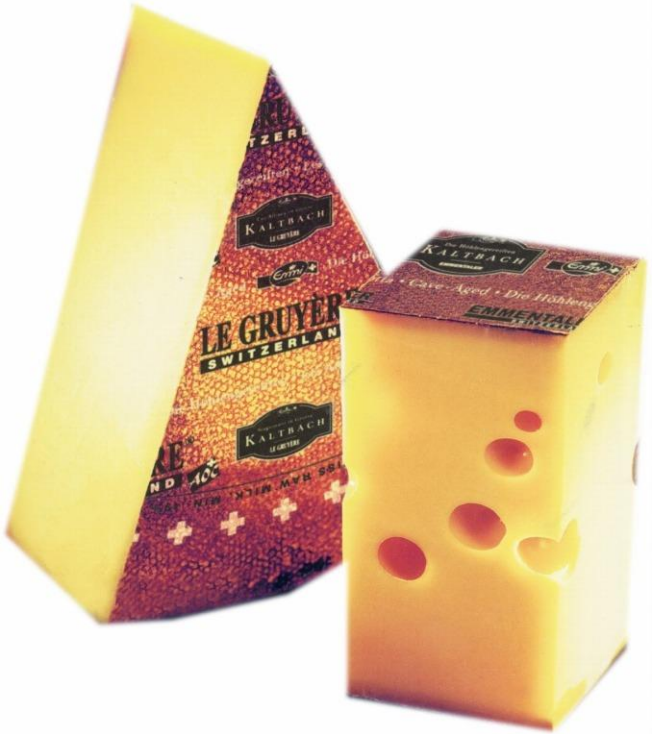


Image by Mintel on GNPD

Nourishment:
Animal Emphasis



Image by Mintel on GNPD

New Norms:
Plant Preparations



Image by Mintel on GNPD

Nourishment/Indulgence
Heroes



Photo use courtesy of Organic Valley

Heroes: **Kidification**



Image source: Cow Candy

Hybrids: **New Norms**



Image on Cheesorizo

Hybrids: **New Norms**



Image on Ford Farm

How People Use it ?

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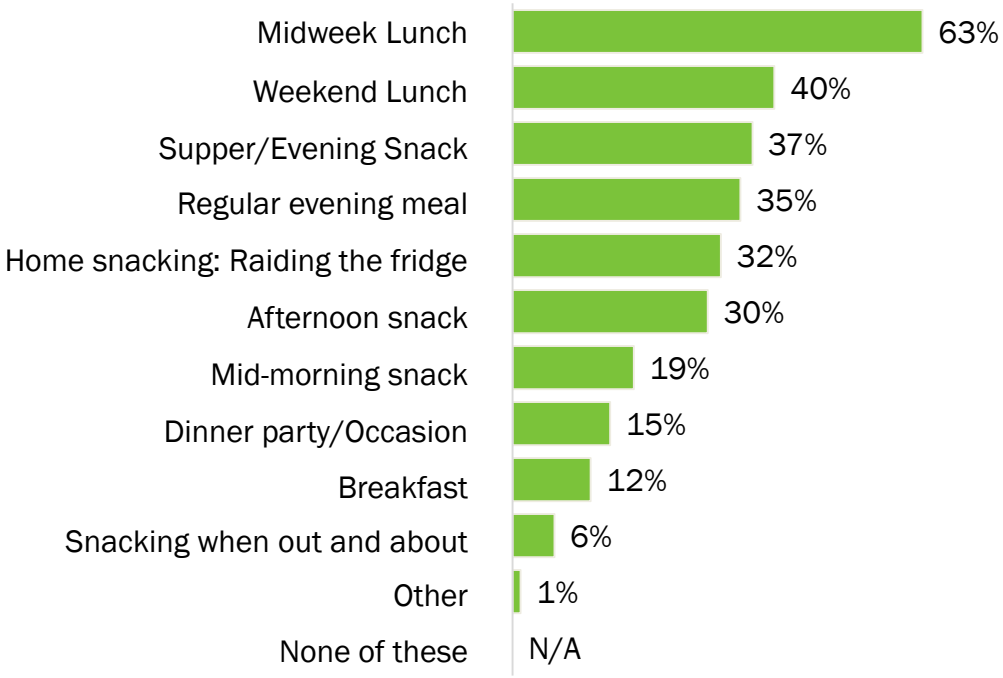
Time of day for consumption

What time of the day do you typically use cheddar cheese, whether that is you consuming it yourself or someone else in your household?





Lunch being the most typical time but snacking in afternoon & evening are all significant cheese consumption occasions

Meet the Real King

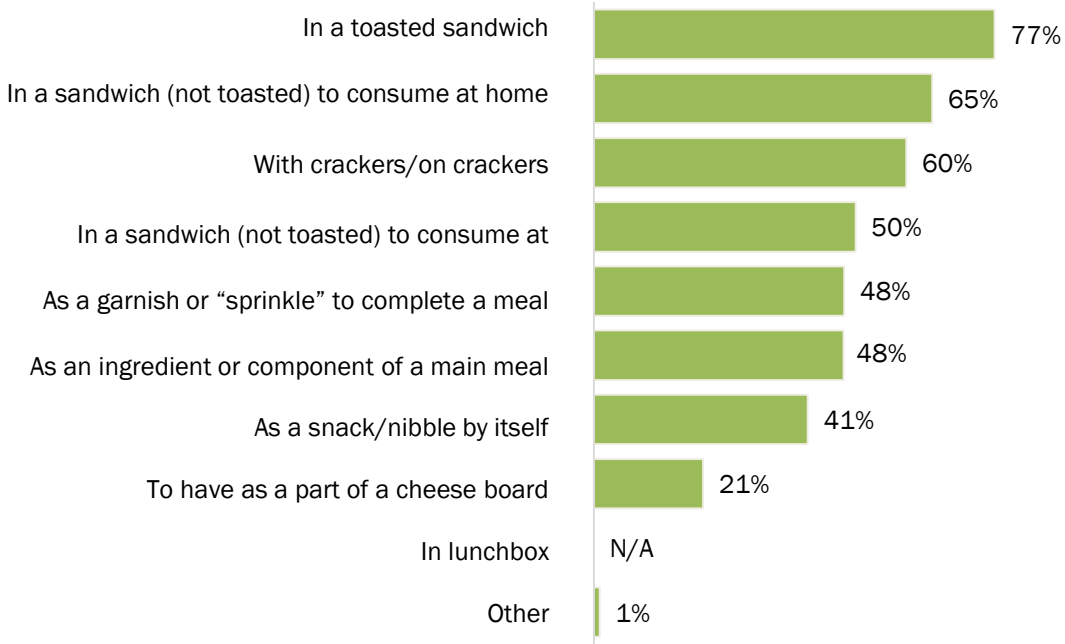
” The toastie is king. So simple but you just can’t beat it”.





In terms of top uses the toastie is the big win!

And, how do you or other adults in your household regularly use cheddar cheese?

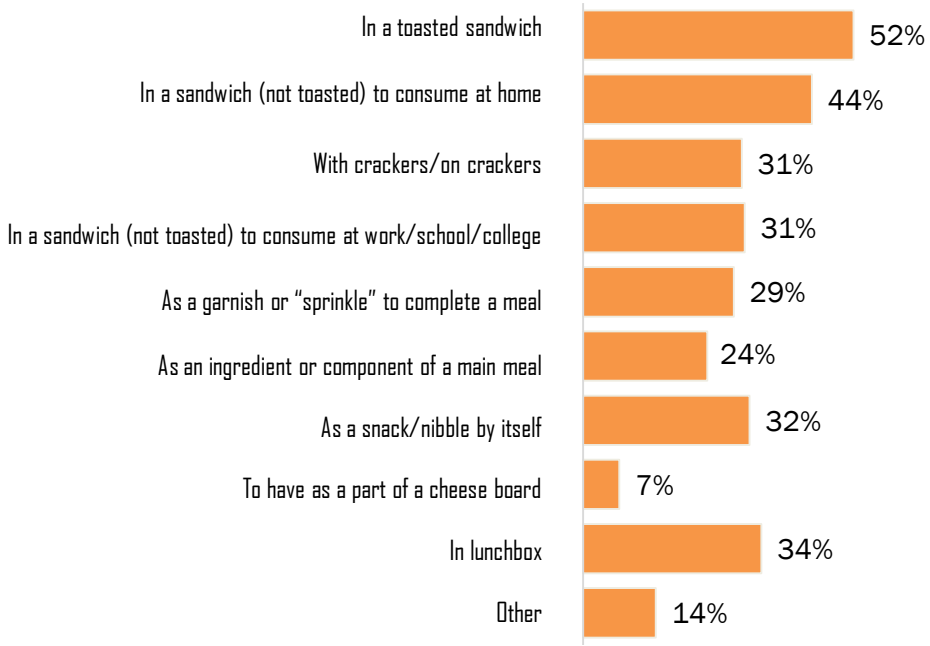


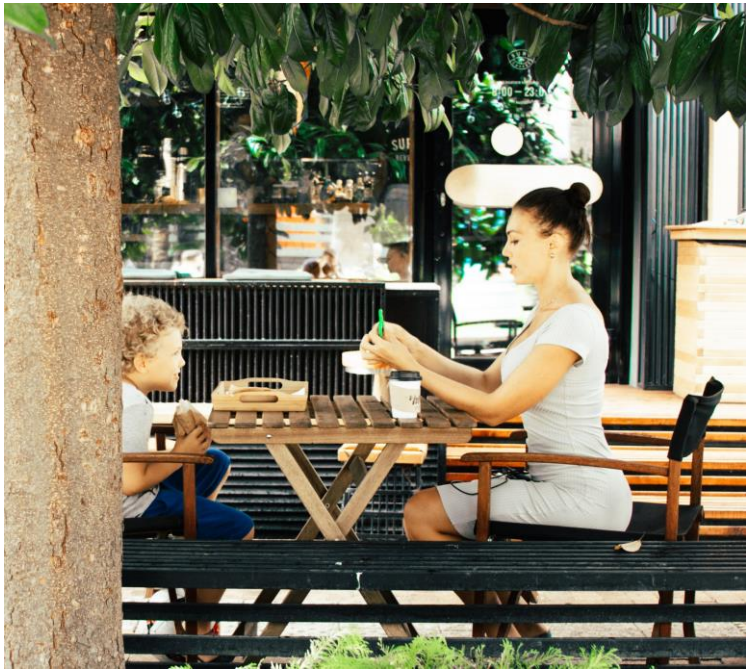


Adults *(Base: All cheddar cheese monthly + buyers n=1,023)*

And with kids it’s the toastie too!

And, how do you or other kids in your household regularly use cheddar cheese?





(Base: All adults with dependent children n=649)

The Cookery Staple

“I swear to God, I probably would have starved as a student without cheese. It’s how you make a meal. Baked potato? Add cheese. Bag of pasta? Add cheese.”

Pre-nester, Dunnnes/ SuperValu/Tesco shopper

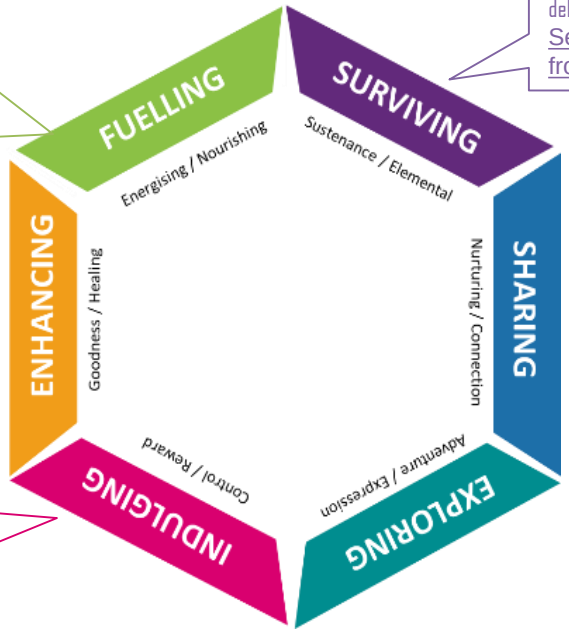
The Family Hero & The crowd pleaser

The fill them upper

“You know that feeling that you just cant make it through to dinner? Sometimes I eat it straight from the fridge because I just cant wait.”

Cheddar cheese currently plays to some of the more fundamental need states

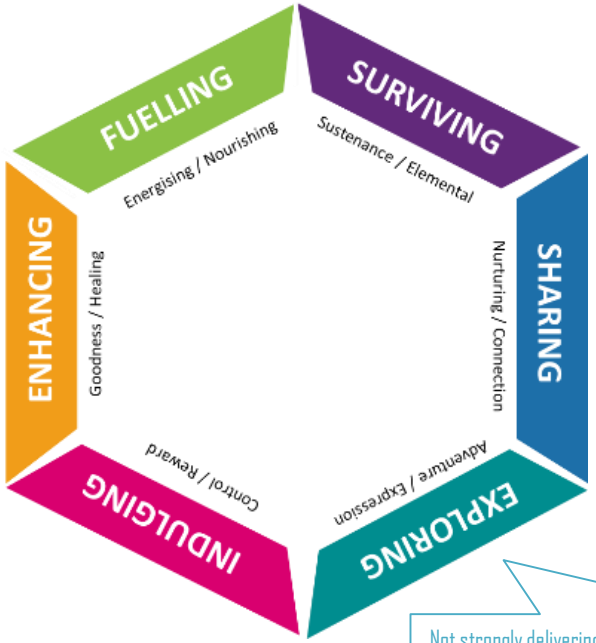
Delivers to fuelling need most strongly due to high energy/calorie count and decent degree of nutrition. Delivery to this need has ensured its position as long standing staple.
See in particular its key role in lunch.
Its natural ability here explains why it would be well suited to late afternoon snacking



It is accessibility and easy to eat nature explains why it delivers here.
See in particular the snacking straight from the fridge occasion.

Also, strongly delivering to indulging needs particularly via its role as a comfort food/party food, delivering here is why it is still a beloved product.
Potential here to draw attention to it as a 'weekend' staple. Great brunch food, indulgent lunch option, sharing options in the evening.

But there are opportunities for it to deliver beyond that



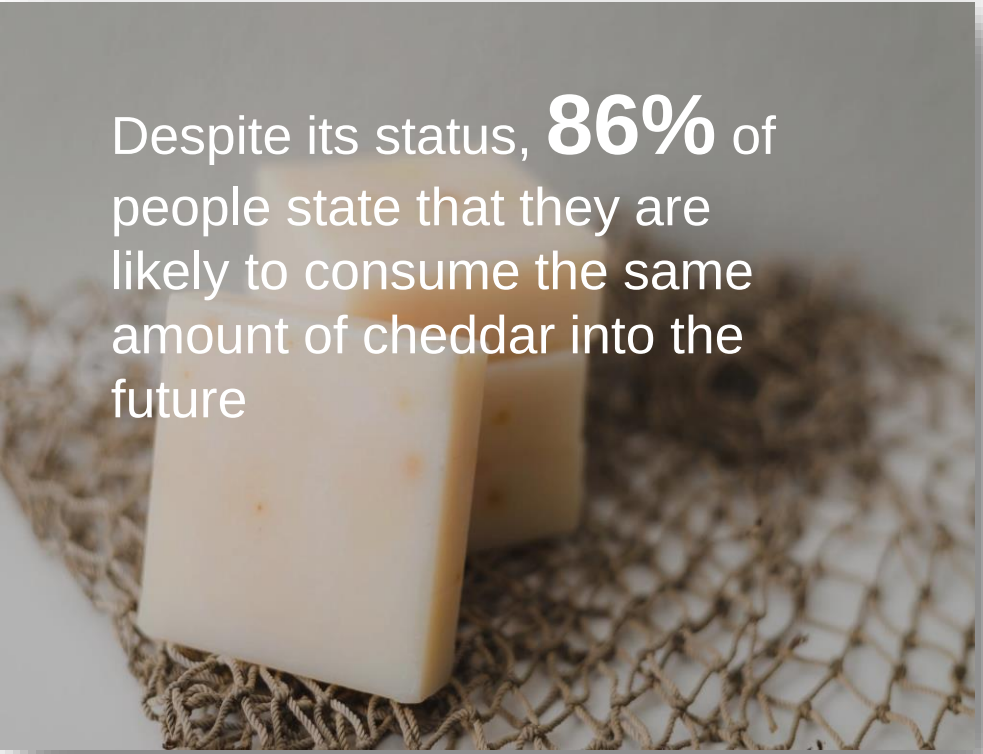
Potential to play more in this space too with functional style products

Already delivering here to some degree. Particularly via its family friendly nature and role in socialising and entertaining.
However, opportunity to really shine in this need. Everyone loves cheese, it should be the ultimate sharing food (platters, cheeseboards, nachos).

Not strongly delivering here currently, but potential in the future, particularly if able to break through into 'cheffy', high end cuisine, and/or greater emphasis on flavours.
Could carve out a role here in fancy weekend dinners.

Drivers to choose more tend to be focused on health

No additives or preservatives	Natural	Low in salt	High Calcium	High Protein
63%	56%	54%	54%	52%



So how do we encourage MORE consumption...

Ten steps to I.N.V.I.G.O.R.A.T.E

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: Indulgent Products

Make cheddar first fiddle.
Move over continental!

Creating more indulgent and gourmet flavours too!

Marry other Irish natural ingredients…seaweeds as example, wild Irish garlic.

More mature flavours.



A low-moisture, part-skim mozzarella cheese with vegetables.



Seoul Milk Black Sliced Cheese:Build new ingredients into cheese..black rice, black sesame and black bran!

Images by Mintel on GNPD

N : New News

Create new ways to cook.

Show case new ways to cook with, make it enticing to use.

Create and demonstrate ways to use for different occasions: with family, for parties, etc

“53% of people interested in more recipes for using different cheeses”
(Mintel, 2017)



Image source Tillamook

https://www.youtube.com/watch?v=fz_vIfhNBvA

Create new routes to market

Consider instore theatre.
How can we re-energise
the craft of cheese making
and the story behind the scenes.



https://www.nicencheesy.ie/

V : Virtuous Cheese

The Virtues of cheese need
to be highlighted.

Remind people about the health credentials especially young people.

Explore new products around health platforms that appeal.

Consider contemporary food values: veganism, etc.

Engage new brand ambassadors.



REHAB HEAL YOUR-SELF

MEDICINAL VEGAN CAFE & BAR



: Innovate

Consider the environment

What's the new parchment

New colour codes and ways to create flavour distinction..

Consider storage of tomorrow, managing waste

To go packaging

New formats for e.g ; balls, *curds*,





http://www.culvers.com/

Edible Kombucha Packaging



Polish design student Roza Janusz has designed a new form of edible bio-packaging made from kombucha that can easily be produced by farmers to wrap their produce, allowing them to bring their products to market with zero waste.

Source: Stylus

G : Great Together With

Create a range of platforms to communicate different foods cheese can be complemented with..what's the new mac n'cheese?!

Consider breakfast – a time of day which was identified as an opportunity to use cheese..
What could cheese be good with..



0 : Opening Up the Occasions

Consider new occasions especially "the 4th meal"

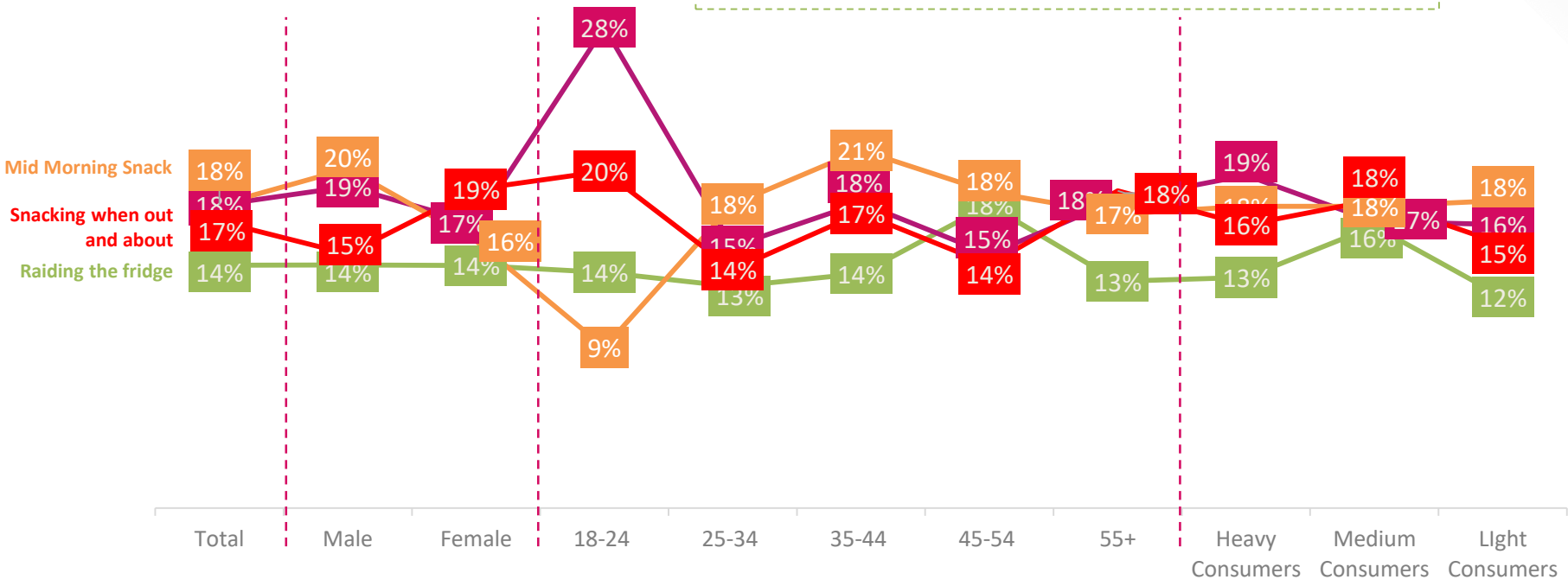
As a stop gap was also seen as important...

Afternoon also present an opportunity



Young people particularly see a role for cheese snacking with the right products

Which, if any, of the following times where you currently don't use cheddar cheese in your household, **would you consider using cheddar cheese in the future**?



Significant difference @ 95% confidence level

“More than a third of people would consider snacking on cheddar cheese in the future in the morning and mid afternoon..”







Images by Mintel on GNPD

R : Refresh & Revive

With contemporary messaging

Make the communications and brands engaging

..

Make the stores more engaging



Image by
Ahmed Ghandour
on Behance LinkedIn

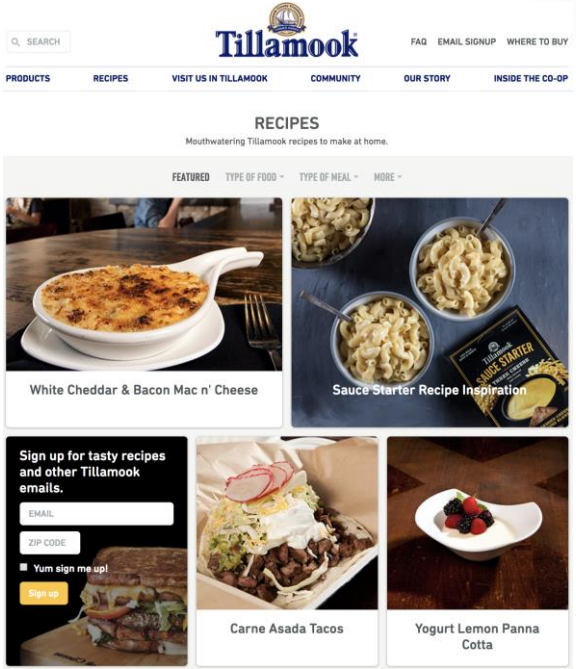
A : Activate Brands

Activate brands
instore and online

Create gourmet stories, health stories.

Engage through programs; cookery programs, cheese clubs, etc.





https://www.tillamook.com/recipes/index.html

"68% of people in the UK say that they are more likely to buy a cheese that they have been able to sample" (Mintel, 2017)





Talkable vegetables Japan
Talking Origin

T : Target

Be relevant

Focus on building relationships with the Younger market

Be aware of how brands speak to them now and what their values are..

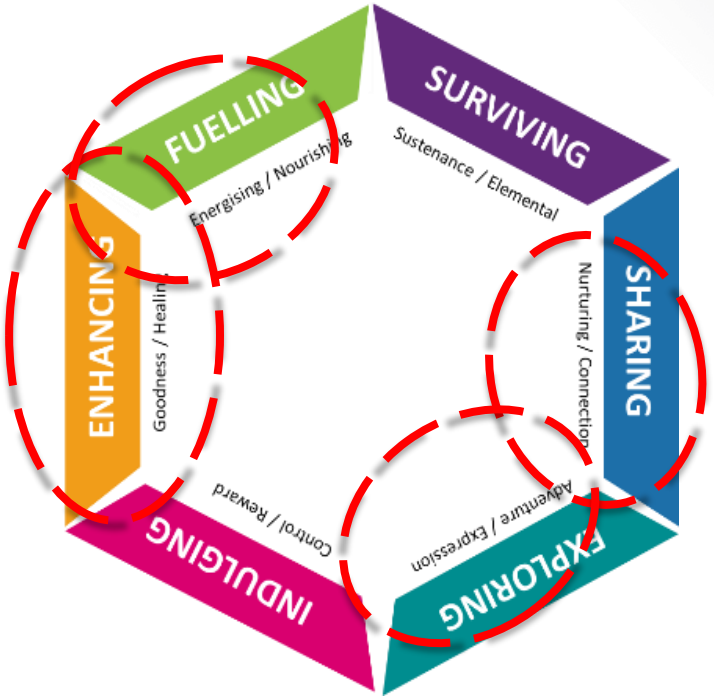
18-24's in particular are looking for snacking products ..



Younger family, Dunnnes/ SuperValu/Tesco shopper

Consider the needs states opportunities





E : Excite & Educate

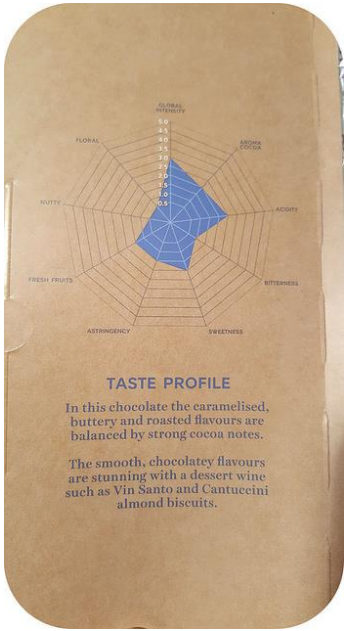
Excite and educate people about flavours and strength. What's the cheese lexicon?

Describe cheese in new ways..

Evolve the language.

Make it clear and simple

Communicate how different strengths and textures work with different meals, etc.





https://brewershaven.ca/rjs-tasting-wheel/

Information is the foundation of all of our work here at the Thinking House. So, our way of working is to always put our good thinking in context and give credit where it's due. You can follow our train of thought in the references below.

References:

Kantar Worldpanel. (2018). *Bord Bia – Cheddar Cheese Market Review*. Kantar Worldpanel.

Kantar Worldpanel. (2018). See reference above

Mintel. (2017). *Cheese - UK*. Mintel. Retrieved from http://reports.mintel.com/display/793825/?highlight

Mintel. (2017). See reference above

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Any Questions?

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