



Roth Insider Survey Results

1/14/2022

**Discovery Oriented Decision Problem:
How do consumers perceive Roth Cheese?**

Research Statements

Primary Research Statements

- Evaluate consumer buying habits of specialty and Roth Cheese
- Compare responses about specialty cheese to Roth Cheese
- Determine if Roth is currently meeting customer needs

Secondary Research Statements

- Determine if origin affects consumer purchases
- Determine if the deli counter has an affect on cheese purchases

About the Survey

- **Conducted through Roth Insider Program**
- **Online survey emailed to over 2500 Insiders**
 - Apart of target demographic
 - Knowledgeable apart Specialty Cheese
 - Emailed in November 2021
- **Simple random sample**
- **42 questions**
- **509 usable responses (86% response rate)**
 - 584 total responses
 - Average time spent: 11 minutes
- **Significance of all analyses will be based on a p-value of less than 0.05**

Important Frequency Analysis

Q1- Where do you purchase Specialty Cheese most often?

Location	Number	Valid Percent (%)
Primary grocery store	271	54
Whole Foods Market	74	15
Walmart	42	8
Costco	35	7
Sam's Club	13	3
Local Cheese Shop	29	6
Other	43	9
Total	507	102

(missing= 2)

95% confident that the proportion of consumers in the Roth population that buy their cheese at their primary grocery store lies between 50% and 58%, inclusive.

Important Frequency Analysis

Q5- How often do you buy Specialty Cheese from the deli area?

Deli Area	Number	Valid Percent (%)
1 time per year	12	2
2-5 times per year	121	24
6-11 times per year	115	23
1 time per month	106	21
More than 1 time per month	151	30
Total	505	100

(missing= 4)

95% confident that the proportion of consumers in the Roth population buy Specialty Cheese from the deli area more than once per month lies between 26% to 34%, inclusive.

Important Frequency Analysis

Q12- Which of the following statements best describes how you typically purchase Specialty Cheese?

Purchase	Number	Valid Percent (%)
On shopping list	265	52
Impulse decision	241	47
Total	506	99

(missing= 3)

Q13- Which of the following statements best describes how you typically select a Specialty Cheese variety to purchase?

Select Variety	Number	Valid Percent (%)
Decide before entering store	127	25
Decide at the shelf	376	75
Total	503	100

(missing= 6)

Q14- Which of the following statements best describes how you typically select a Specialty Cheese brand to purchase?

Select Brand	Number	Valid Percent (%)
Know before entering store	102	20
Decide at shelf	404	80
Total	506	100

(missing= 3)

Important Frequency Analysis

Q32- When you think about Roth Cheese, what comes to mind?

Roth Cheese Mind	Number	Valid Percent (%)
Great Quality	192	44
Great Cheese	135	31
Grand Cru	15	3
Other specific cheese	24	5
Hard to find	10	2
Nothing	12	3
Never tried	2	1
Variety/unique	28	6
Wisconsin	23	5
Total	441	100

(missing= 68)

95% confident that the proportion of consumers in the Roth population that think of great quality about Roth Cheese lies between 39% to 46%, inclusive.

Important Frequency Analysis

Q41- Indicate how much you agree with this statement: Roth Cheese provides new and exciting products.

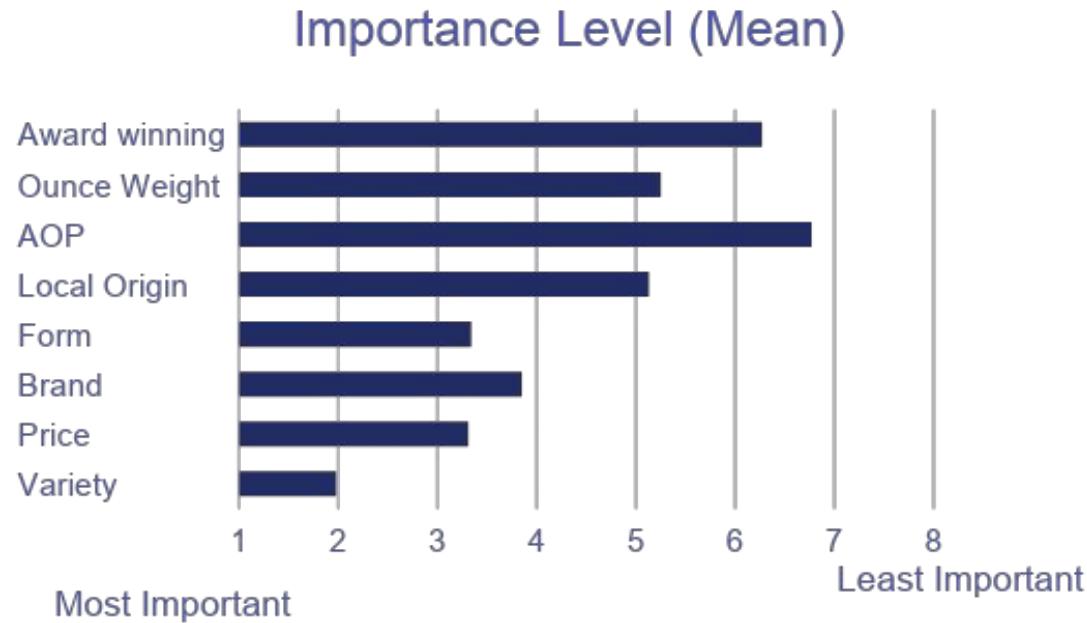
New and exciting	Number	Valid Percent (%)
Agree	396	80
Neither agree nor disagree	97	20
Disagree	5	1
Total	498	101

(missing= 11)

95% confident that the proportion of consumers in the Roth population that agree Roth provides new and exciting products lies between 76% and 84%, inclusive.

Important Multivariate Analysis

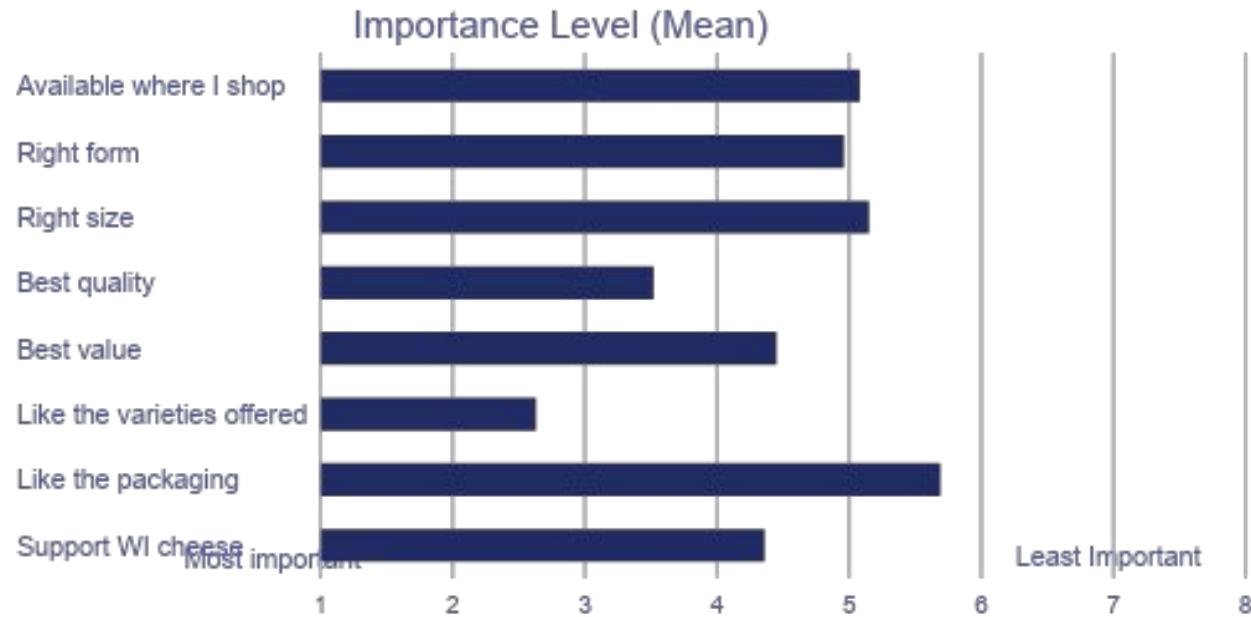
Analysis of Question 15: Rank the following in order of importance when purchasing Specialty Cheese. 1 is most important, 8 is least important.



Based on the descriptive statistics and paired sample t-tests of variety, award winning, and AOP certification, we can tentatively accept the alternative hypothesis (p-value is 0.000) that AOP and award winning are the least important traits of specialty cheese to Roth consumers and that variety is the most important trait of specialty cheese to Roth consumers.

Important Multivariate Analysis

Analysis of Question 34: Why do you buy Roth Cheese? 1 is most important, 8 is least important.



Based on the descriptive statistics and paired sample t-tests of varieties offered and packaging, we can tentatively accept the alternative hypothesis that liking the packaging is the least important aspect of Roth cheese to Roth consumers and that Roth's varieties is the most important aspect of Roth cheese to Roth consumers.

Important Multivariate Analysis

Cross Tabs Analysis of Question 6 & 7: Does buying cheese from the deli counter lead to believing it is higher quality?

Engage with deli clerk?	Deli counter cheese is higher quality?			Total
	Agree	Neither	Disagree	
Never	13 (20%)	30 (50%)	21 (33%)	64
Rarely	45 (29%)	72 (47%)	36 (24%)	153
Sometimes	69 (37%)	105 (56%)	15 (8%)	189
Often	37 (46%)	37 (46%)	6 (8%)	80
Always	13 (68%)	4 (21%)	2 (11%)	19
Total	177	248	80	505

Tentatively, we can say that there is a relationship. Roth consumers who sometimes or often engage with a deli clerk believe that deli counter specialty cheese is higher quality than pre-cut, on-the-shelf specialty cheese.

Important Multivariate Analysis

Cross Tabs Analysis of Question 27 & 28: Does the impact of origin on purchasing decision lead to believing that Wisconsin cheese is higher quality?

Decision impacted by origin?	Wisconsin cheese is higher quality than other US-produced cheeses?			Total
	Agree	Neither	Disagree	
Yes	139 (53%)	100 (38%)	22 (8%)	261
No	70 (29%)	144 (59%)	30 (12%)	244
Total	209	244	52	505

Tentatively, we can say that there is a relationship. Roth consumers whose purchasing decisions are impacted by origin agree that Wisconsin cheese is higher quality than other US-produced cheeses.

Evaluate consumer buying habits of Specialty Cheese

- Purchase at grocery store, in-store, and specifically at Kroger
- Pay \$8 or more for one 6-8 oz piece and buy more than one time per month
- Only half bought other brands more than Roth and the most common brands were Boar's Head and Castello, but no overwhelming majority and many brands were stated
- Top three varieties: Cheddar, Parmesan, and Fresh Mozzarella
- Bottom two varieties: Comte and Fondue
- Split on whether Specialty cheese is an impulse decision or on grocery list
 - However, selecting brand and variety is done at the shelf and not decided ahead of time
- Variety and price are the most important traits of a Specialty Cheese
- In-store samples is the most important for deciding to purchase a new cheese
- Majority do not prefer a predetermined variety pack
- Many like they like spicy, smoky, and sweet cheese
- Prefer to crumble or shred themselves than have it pre-shredded

Key Findings

Determine perception of sustainability in Specialty Cheese

- Most important sustainability attribute is sourced from family farms
 - Least important is Vegetarian
- Majority agreed or were indifferent to sustainability certifications affecting their purchasing decision
 - Only 11% of respondents disagreed
- Most looked for certification is USDA Organic and Certified Humane
- Sustainability claim ranked the lowest in a grouping of other reasons why respondents decided to purchase a new cheese

Key Findings

Compare responses about specialty cheese to Roth Cheese

- Everyday snack and cheeseboard was the most frequent use for both Specialty and Roth Cheese
 - Least important use for both is gift
- Variety was the most important trait for both Specialty Cheese and Roth Cheese
- Top and bottom varieties for Specialty Cheese and Roth Cheese were not the same

Key Findings

Determine if Roth is currently meeting customer needs

- Majority agree that Roth is offered at a fair price, made with quality ingredients, and handcrafted in Wisconsin
 - Also believed that Roth products are new and exciting and offered in the format desired
- When asked about availability, majority agree that it is easy to find where they shop but when given an open-ended question about Roth, a small percentage did say that they think it is hard to find
- Packaging is the most common reason for initially buying Roth but the least important reason for continuing to buy Roth
 - Varieties offered is the most important reason for continuing to buy
- Top two varieties of cheese bought at least once in the past year is Smoked Gouda and Creamy Havarti
 - Bottom Two varieties is Organic Grand Cru and Organic Van Gogh Gouda
- When asked what comes to mind when thinking about Roth, 44% of respondents stated great quality

Key Findings

Determine if origin affects consumer purchases

- Origin can affect consumer purchasing decisions
 - Split almost evenly amongst respondents whether origin is impactful to decision
- If origin is impactful to the consumer, then tentatively they do believe that Wisconsin cheese is higher quality
- In an open-ended question about what “Made in Wisconsin” means 45% did not apply special meaning to it but 31% did believe that it meant a higher quality cheese in some aspect

Key Findings

Determine if the deli counter has an affect on specialty cheese purchases

- The deli counter does appear to have a slight to modest affect on perceptions of deli counter cheese
- Even some of those that rarely or never purchase from a deli counter clerk believe that the deli counter is higher quality