

Consumer Perspectives on **Dairy Products and Alternatives**

2024 Jakpat Survey Report



Forewords

Dairy products contain important sources of essential nutrients such as calcium, protein, and vitamins. Additionally, dairy has many derivatives that offer different tastes and cater to various needs. Over time, alternatives to dairy products have also gained popularity, meeting the consumer's needs.

In this report, Jakpat explore consumer perspectives on dairy products and their alternatives, exploring why people choose them.





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Research details

Data collection

- The survey was distributed to a total of **1238 respondents**
- The data were collected from **6th-7th of September 2024**
- Margin of error **below 5%**
- The questionnaires were distributed via **Jakpat mobile app**
- Proportioned by **Indonesian internet population**

Research objective

Exploring consumer perspectives on:

- Dairy milk
- Plant-based milk
- Yogurt
- Cheese
- Butter
- Margarine

Research highlights

- Nearly all consumers pay attention to the nutritional facts
- 3 out of 10 people consume milk with coffee
- Flavored yogurt is the most popular type of yogurt
- The taste and texture of cheese are important to 64% of women
- 2 out of 4 respondents consider the expiration date when buying butter/margarine



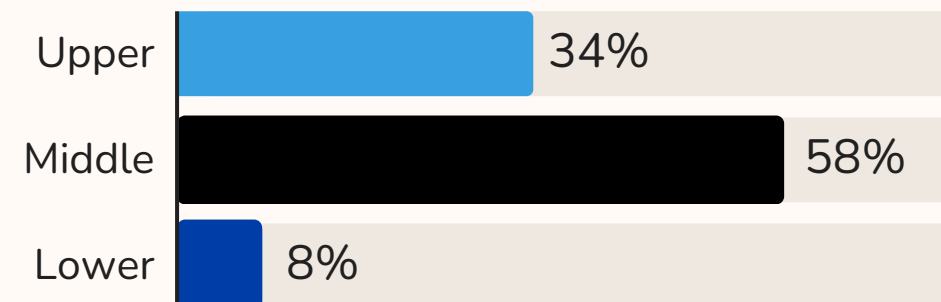
Demographic profile

n= 1238 respondents

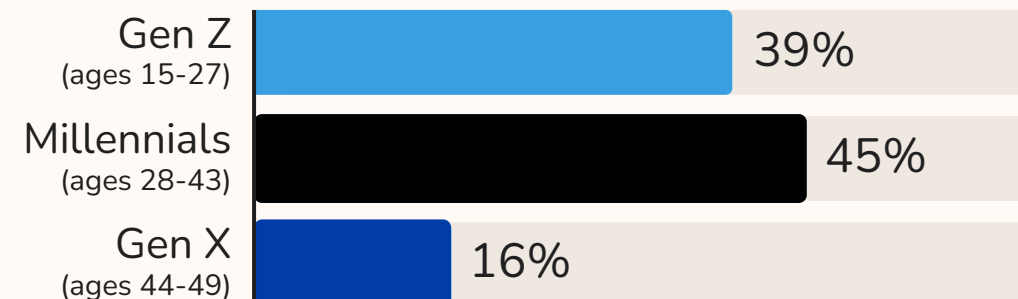
Gender



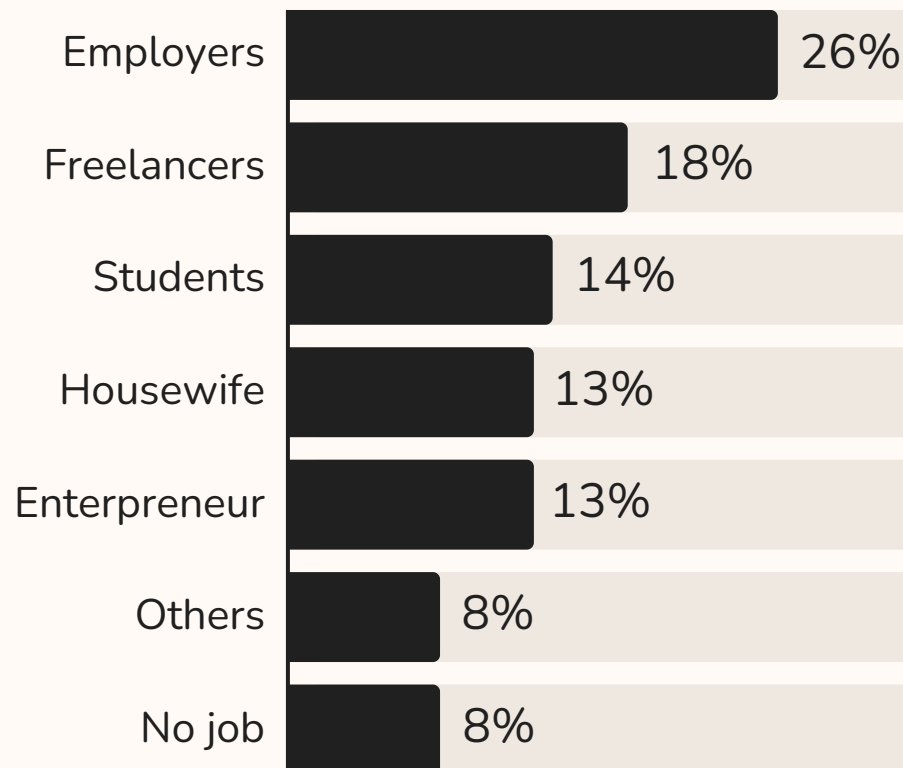
SES



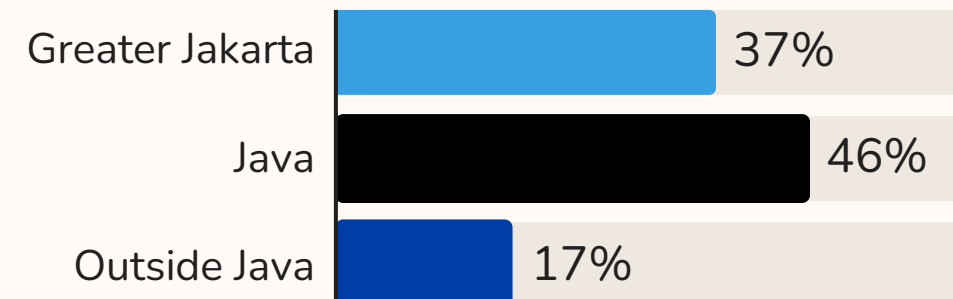
Age cohort



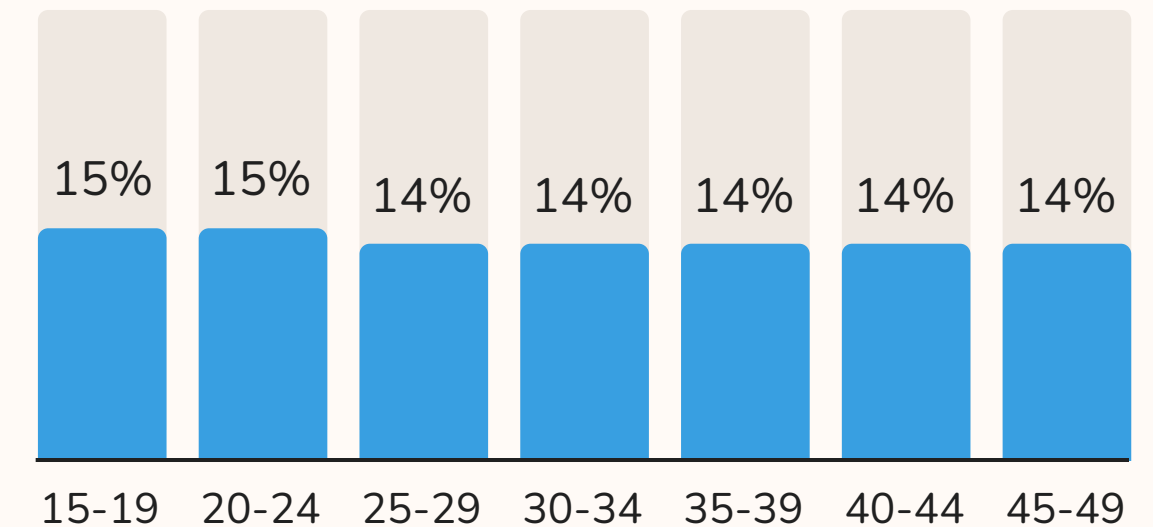
Occupation



Area*



Age range



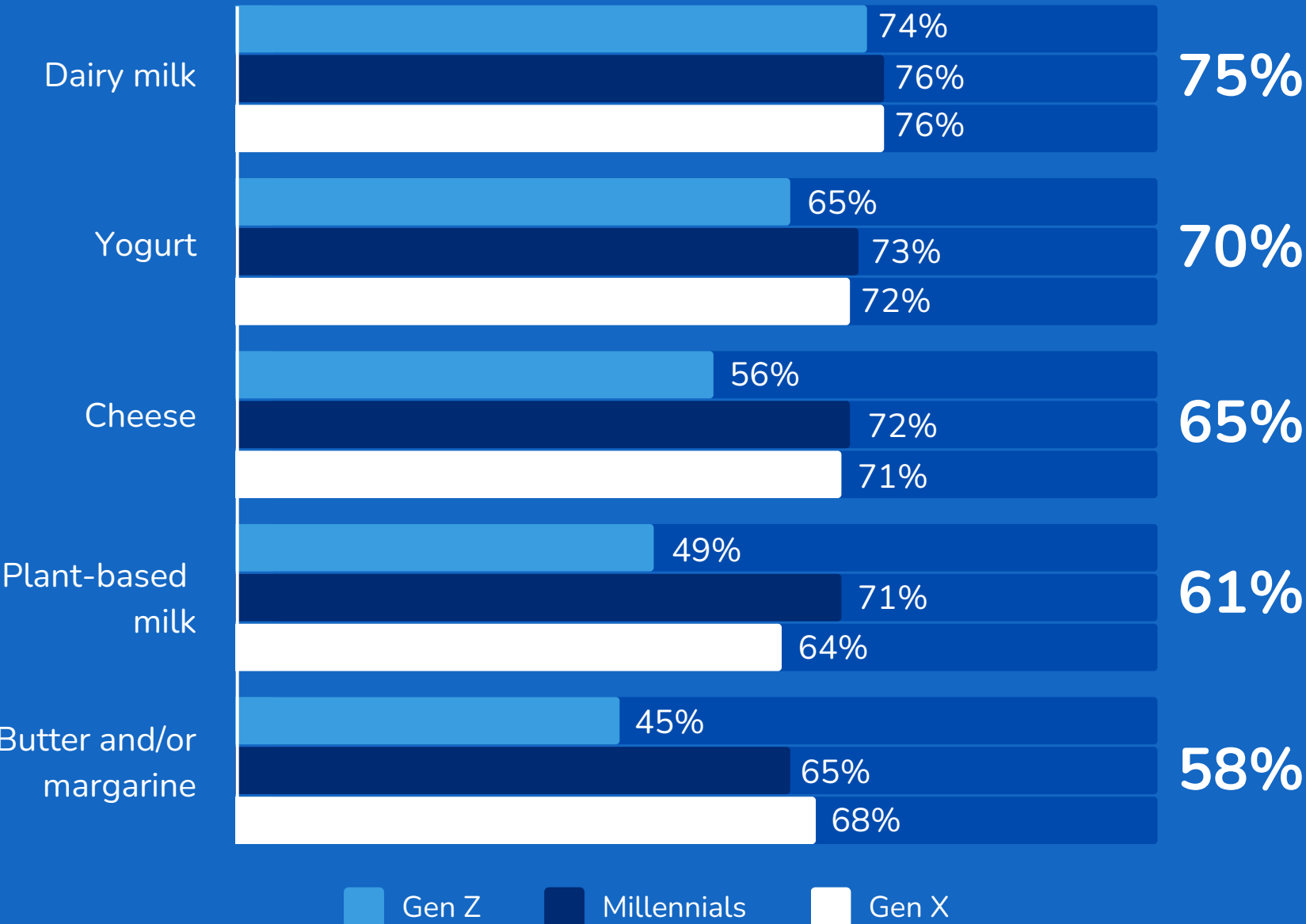
Area*

- Greater Jakarta: Jakarta Pusat, Jakarta Barat, Jakarta Selatan, Jakarta Timur, Jakarta Utara, Kota Bogor, Kota Depok, Kota Tangerang, Kota Tangerang Selatan, Kota Bekasi.
- Java: Jawa Barat (exclude Kota Bogor, Kota Depok, Kota Bekasi), Banten (exclude Kota Tangerang, Kota Tangerang Selatan), Jawa Timur, Jawa Tengah, DI Yogyakarta.
- Outside Java: all areas in Sumatera, Kalimantan, Bali, Nusa Tenggara, Sulawesi, Maluku & Papua.

Most consumers pay attention to nutritional facts

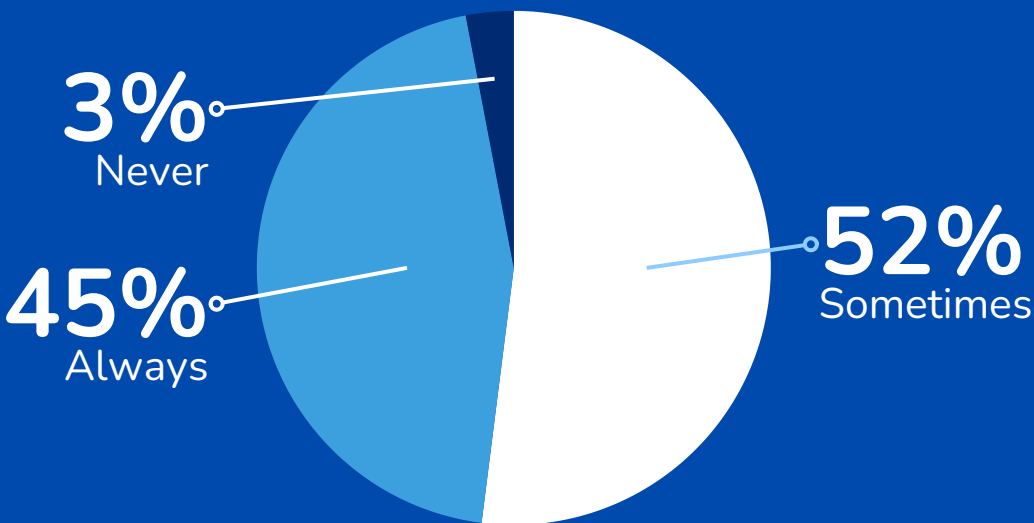
Which of these dairy products and alternatives have you ever consumed?

n= 1238 respondents



Do you pay attention to the nutritional facts of those products?

n= 1191 dairy and alternative consumers



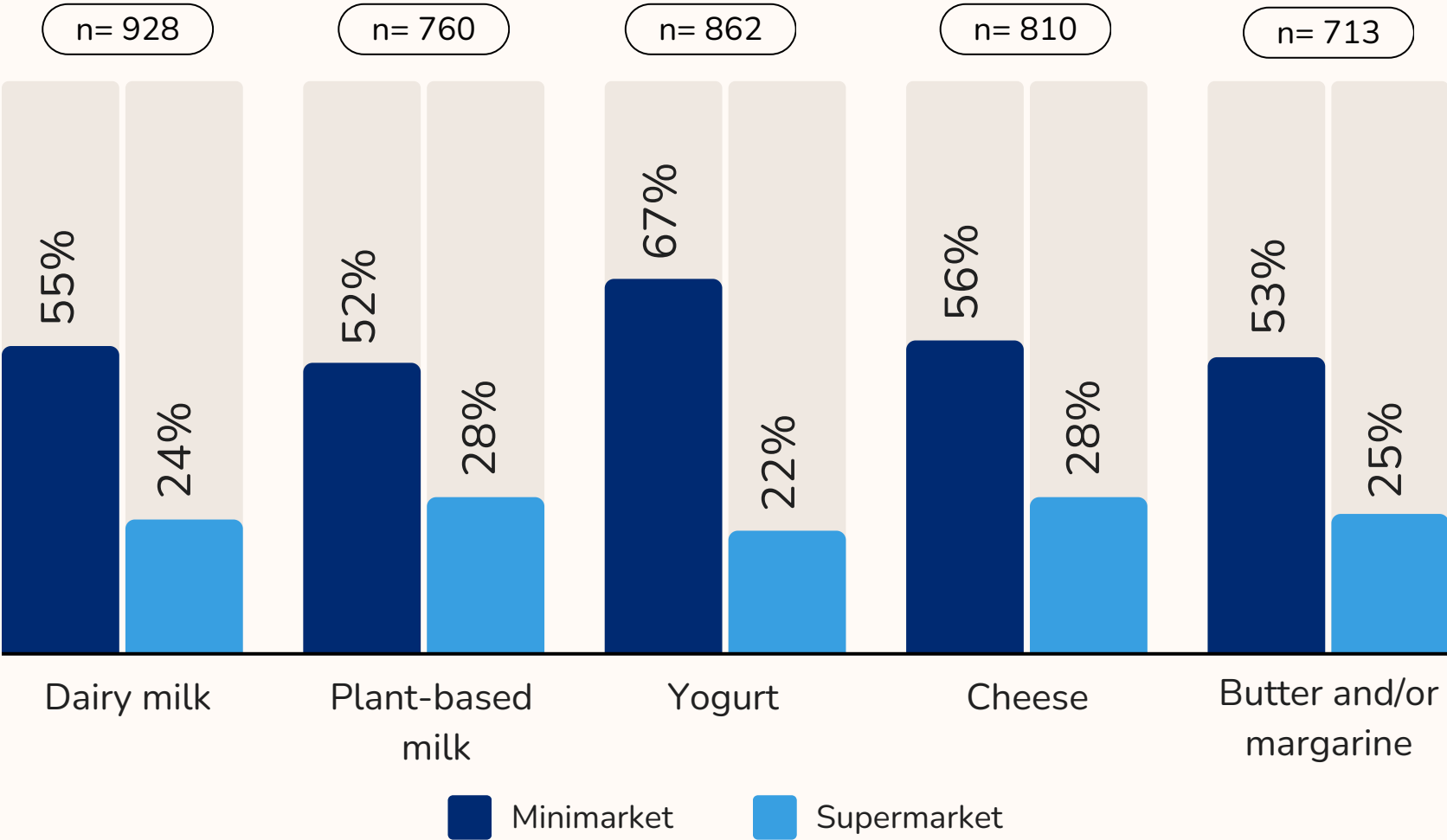
Dairy milk is the most consumed product among respondents. However, plant-based milk is chosen by 61% of respondents and is most commonly consumed by Millennials. When buying these products, nearly all consumers pay attention to the nutritional facts, whether consistently or occasionally.

Cow's milk is the most popular dairy milk, chosen by 96% of consumers



More than half of the respondents purchase dairy milk at minimarkets

Where do you usually purchase these products?



Most respondents purchase dairy products at minimarkets. Some also purchase at supermarkets while half of buyers at minimarkets.

In supermarkets, plant-based milk and cheese are the most commonly purchased.



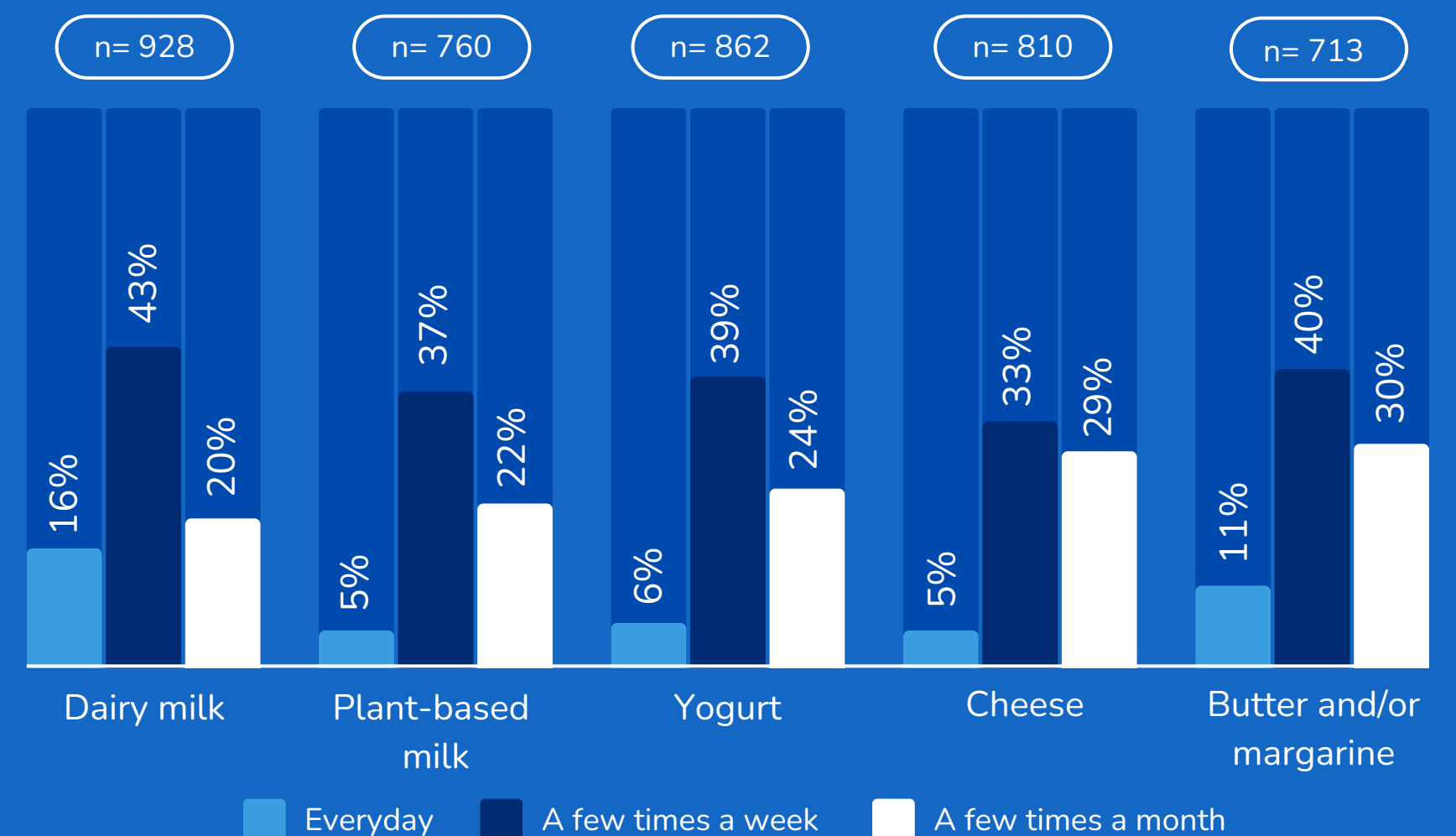


16% of respondents consume dairy milk daily

Dairy milk is the most frequently consumed product, with **16% of respondents consume it daily** and 43% consume it a few times a week.

On the other hand, 22% of people drink plant-based milk a few times a month.

How often do you consume these products?



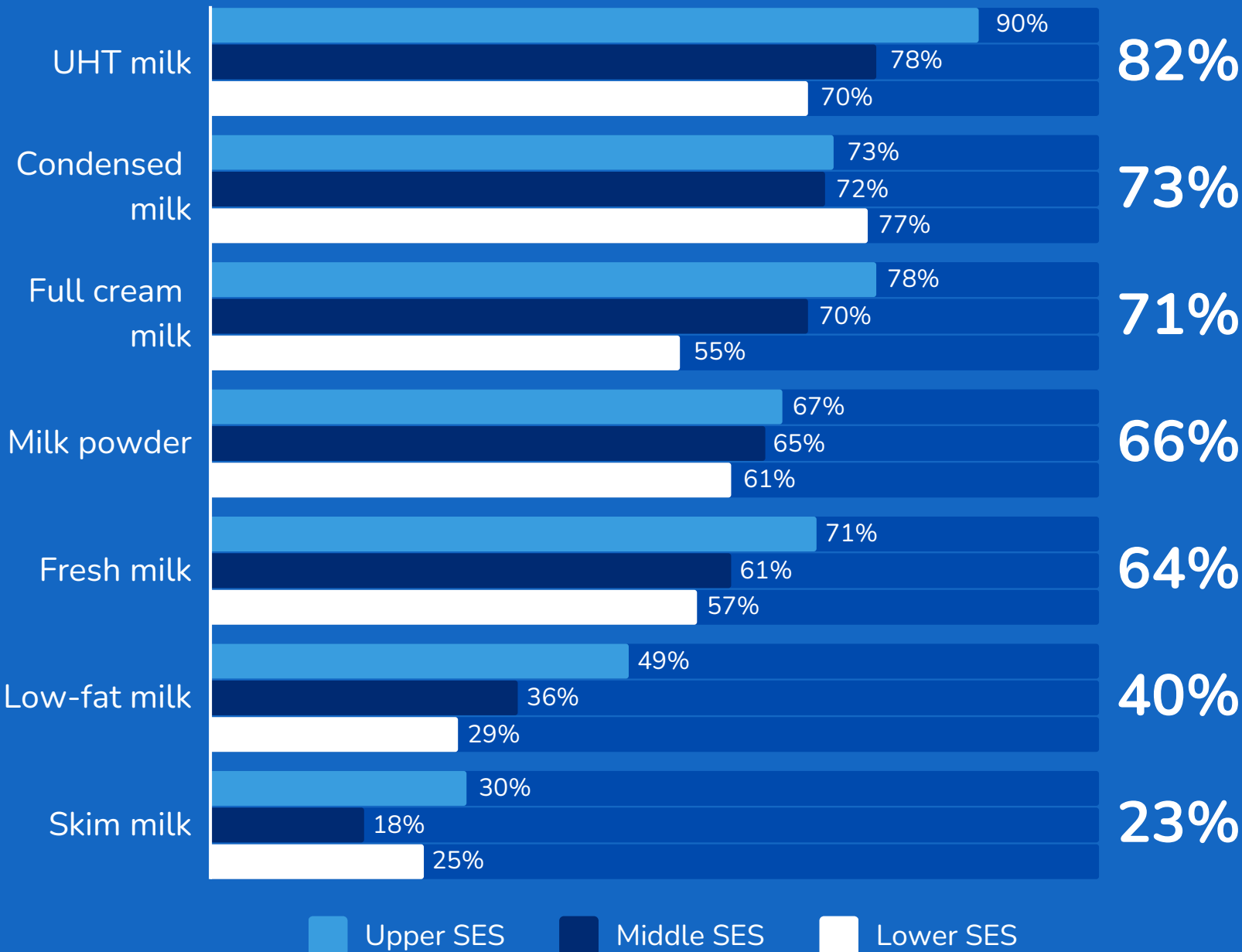
Milk



UHT milk is the most preferred type of milk

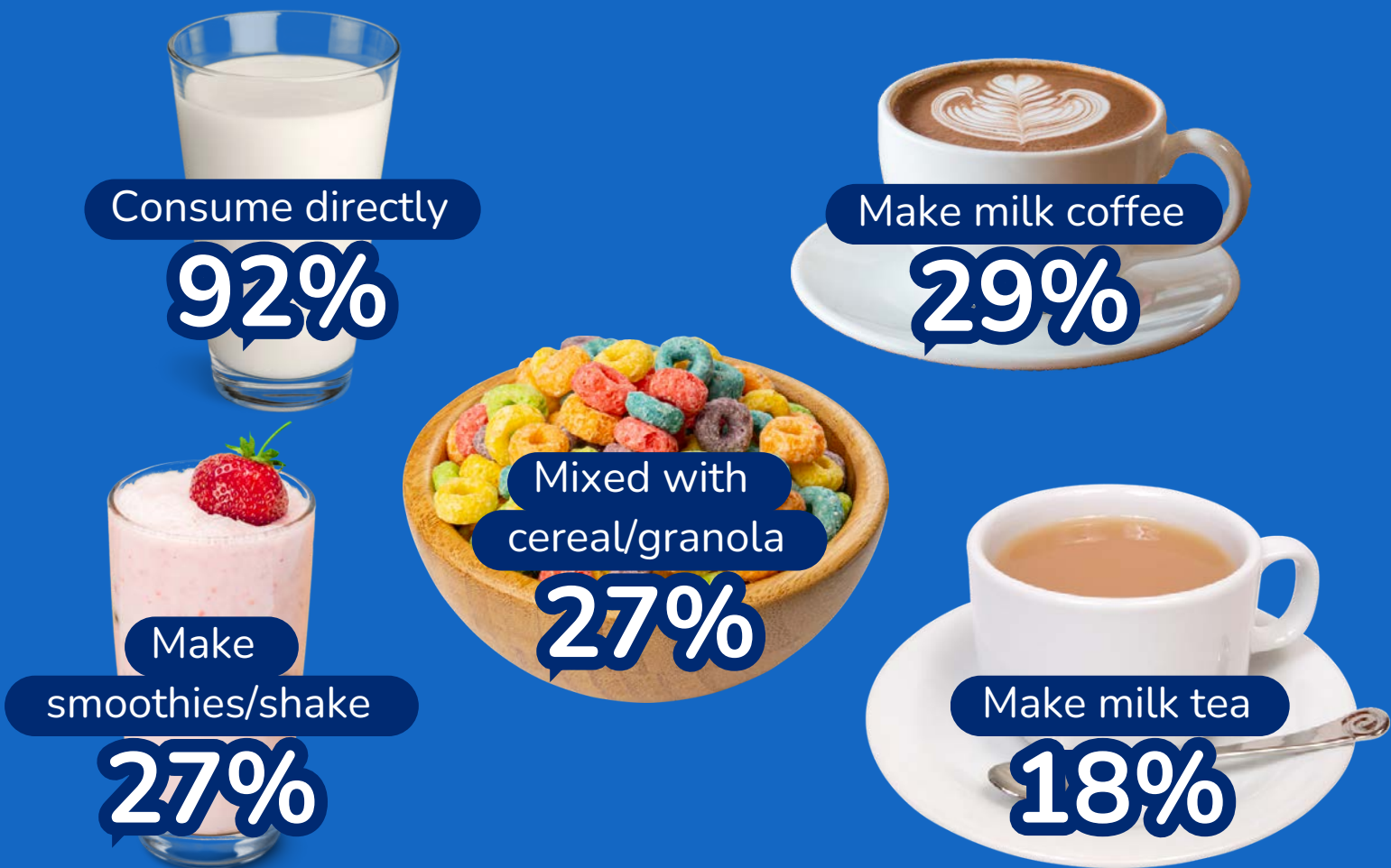
Which types of dairy milk do you consume?

n= 889 cow milk consumers



How do you usually consume milk?

n= 1055 milk consumers



UHT, full cream, and fresh milk are the types most favored by Upper SES. On the other hand, Lower SES prefers condensed milk and shows less interest in full cream milk, which is liked by other segments.

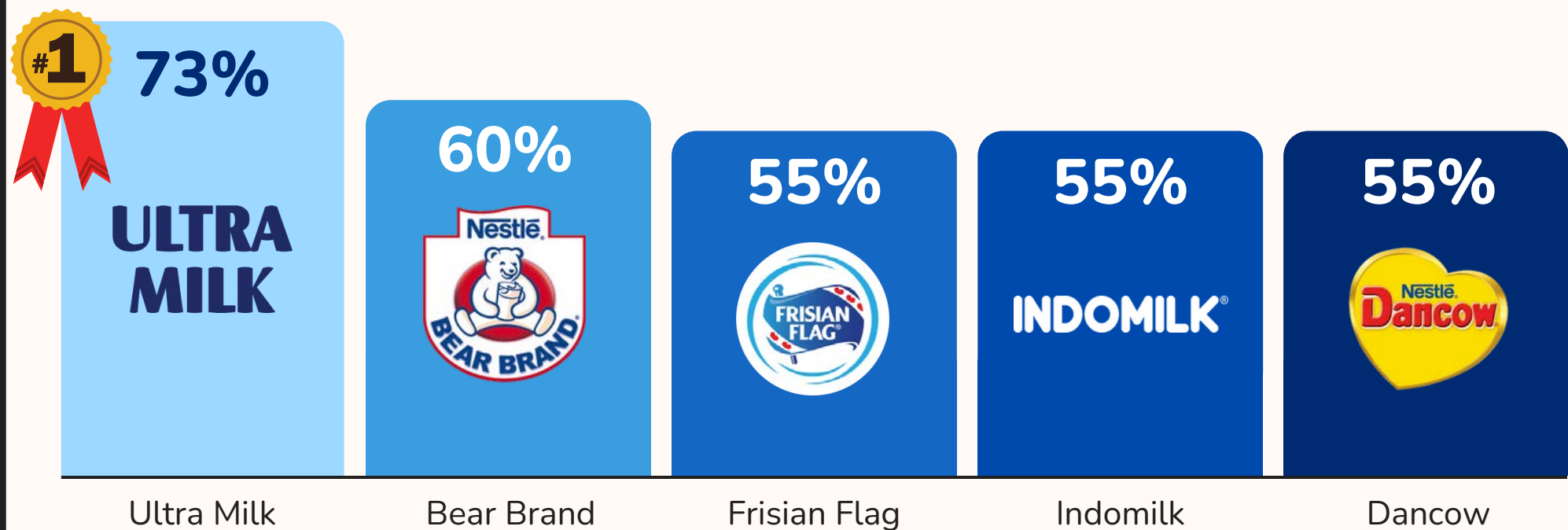
The majority of respondents consume milk directly. 3 out of 10 people consume it as coffee milk.

Ultra Milk ranks first in both brand image and brand usage for dairy milk

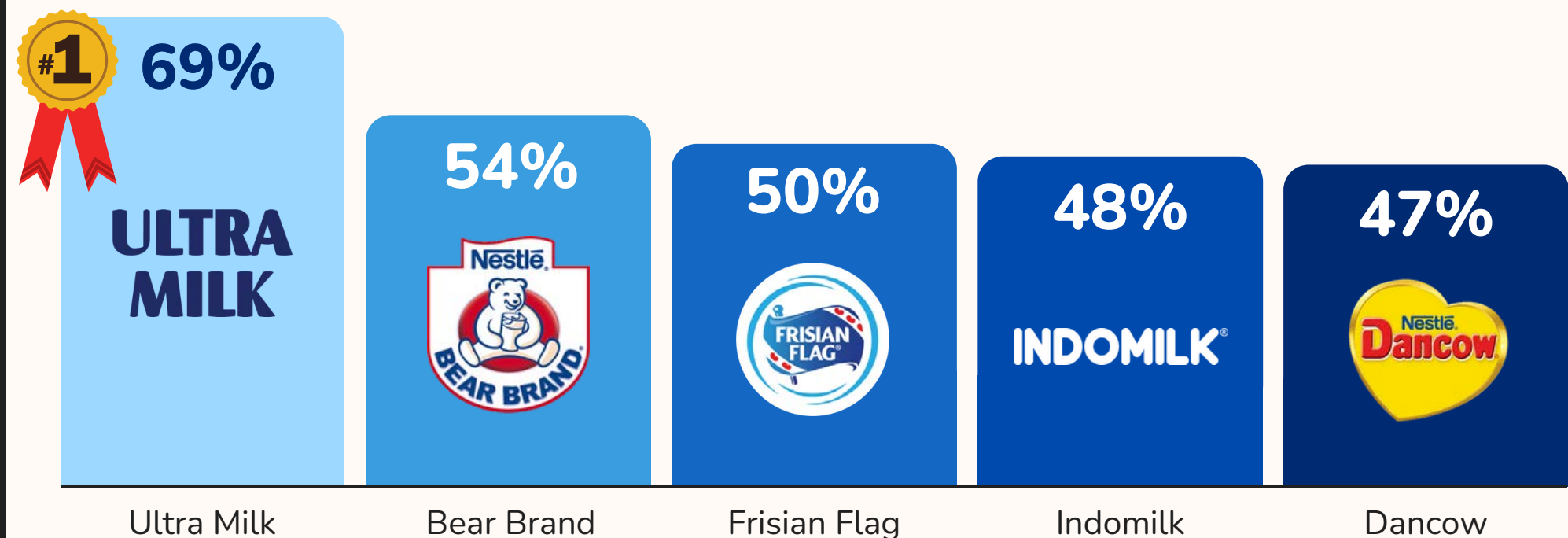
n= 928 dairy milk consumers

When comparing brands of dairy milk considered good and those actually consumed, the top 5 brands are in the same identical order. Frisian Flag, Indomilk, and Dancow have the same percentage in brand image, but there are slight differences in the consumption percentages.

Which brands of dairy milk do you think are good?

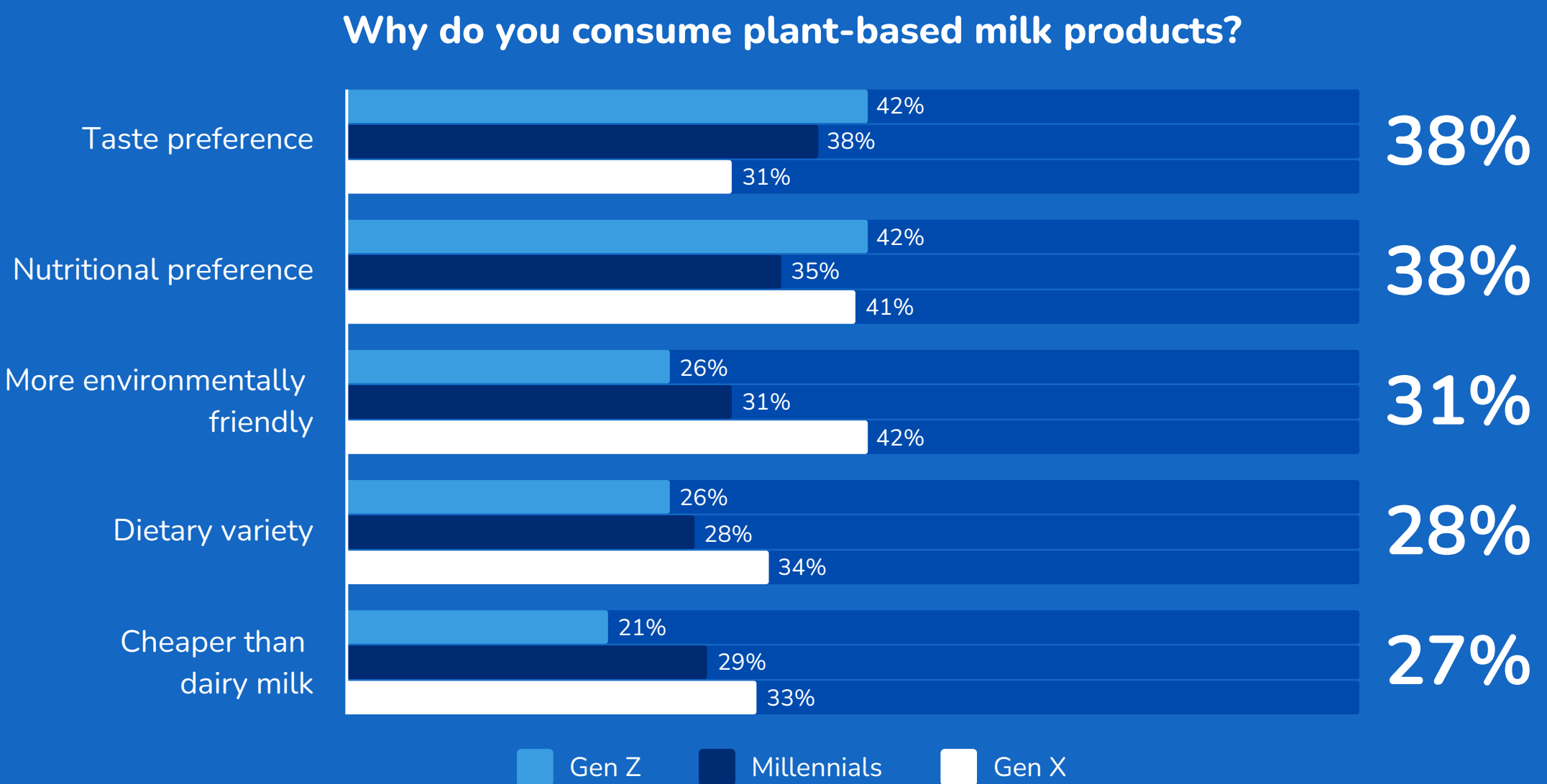


Which brands of dairy milk do you consume?



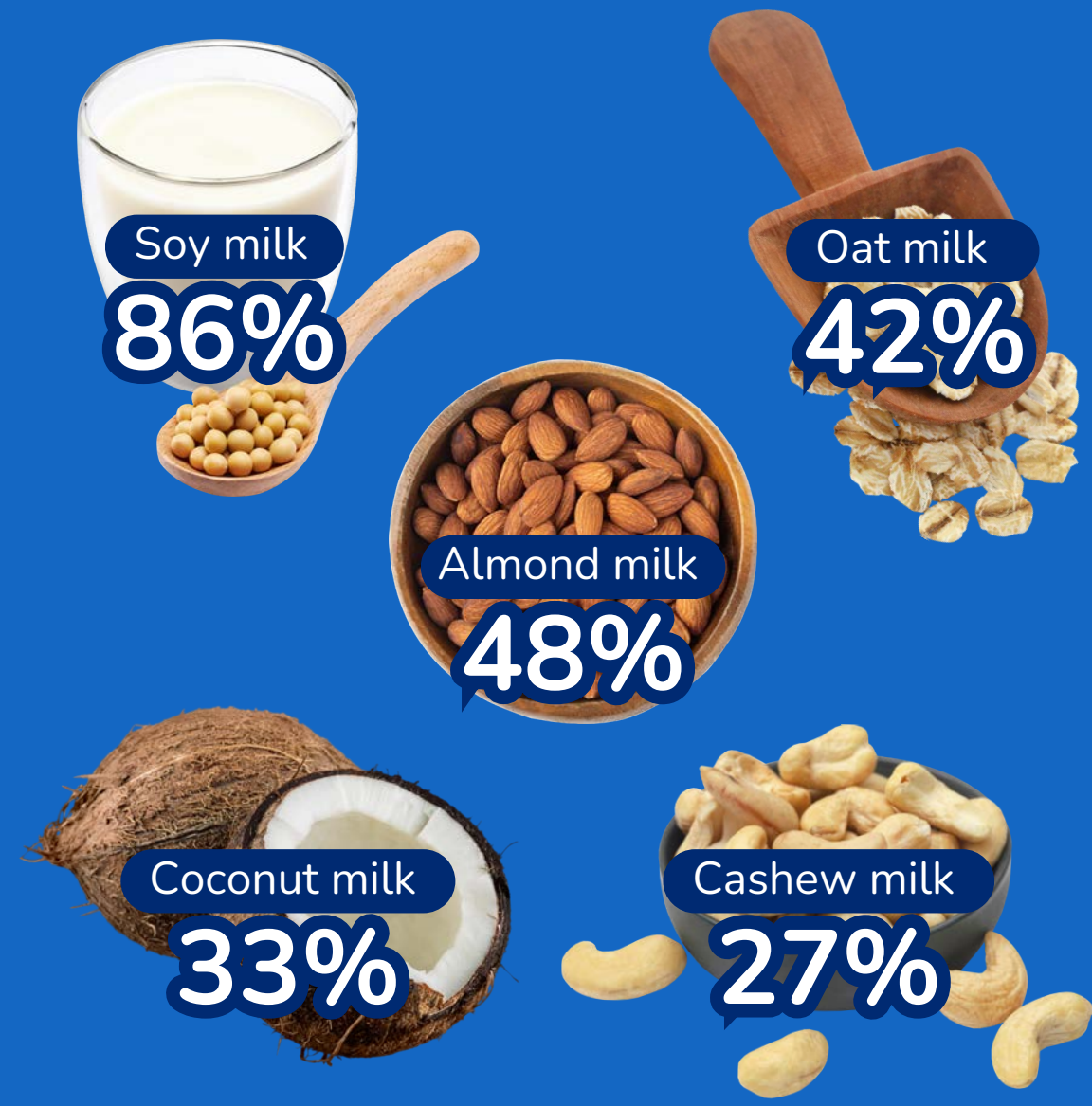
42% of Gen Z consume plant-based milk due to flavor preference

n= 760 plant-based milk consumers



38% of respondents consume plant-based milk products due to taste and nutritional preferences. More specifically, Gen X is more likely to choose plant-based milk because it is considered more environmentally friendly compared to dairy milk products.

Which plant-based milk have you consumed?



Soy, almond, and oat are the three most popular types of plant-based milk. However, there is a noticeable difference gap percentage between soy milk and other plant-based milk alternatives.

Despite being new, Outside takes second spot for plant-based milk

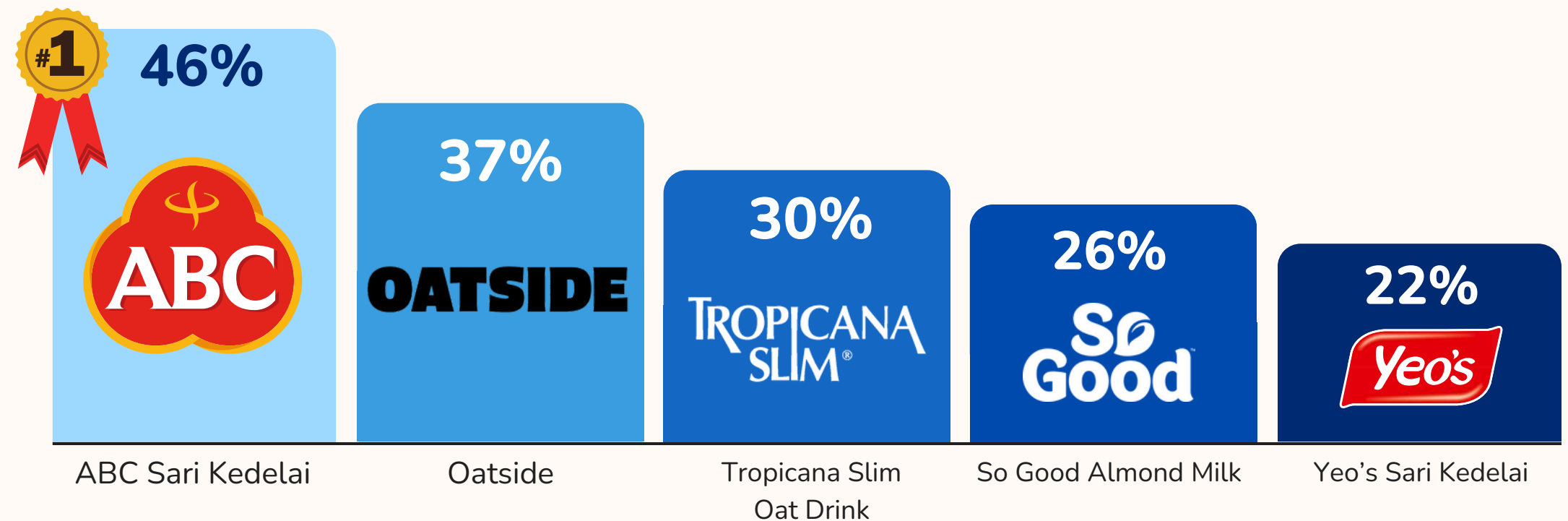
n= 760 plant-based milk consumers

The same five brands appear in brand image and brand usage categories for plant-based milk.

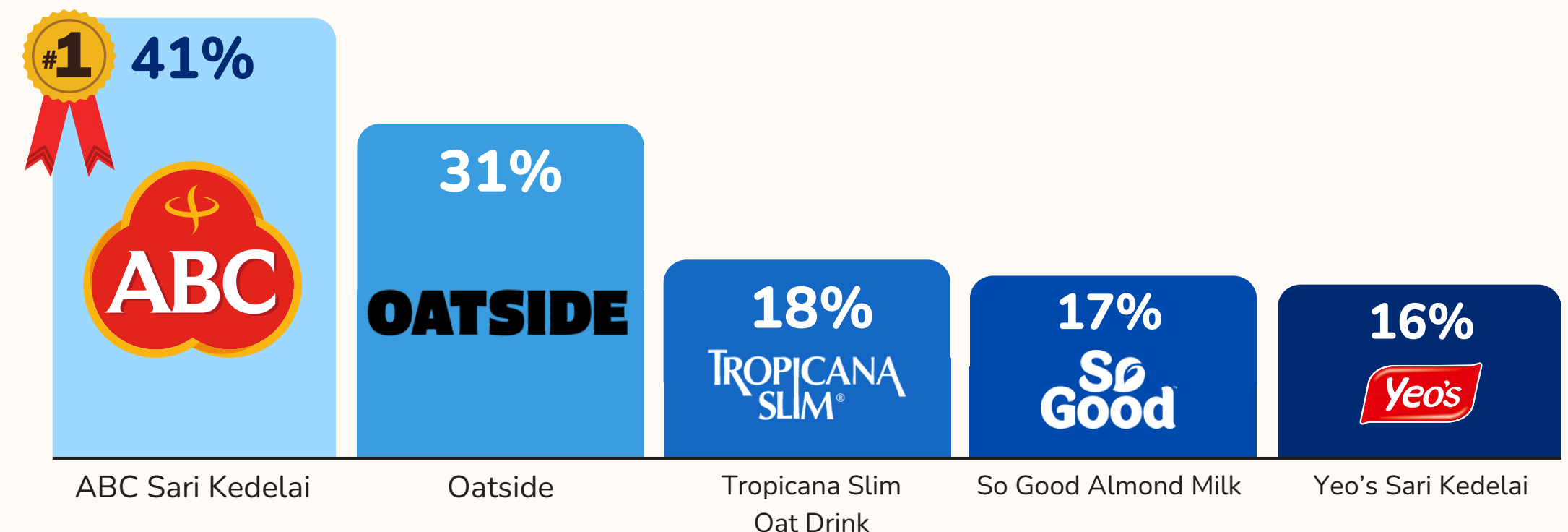
However, when it comes to consumption, the numbers are higher for the top two brands: ABC Sari Kedelai (41%) and Outside (31%). Interestingly, Outside has been on the Indonesian market for only three years¹, yet it has already managed to secure the second position in the plant-based milk segment.

¹<https://www.kompas.com/food/read/2022/01/28/151800475/susu-oat-rendah-gula-hadir-di-indonesia-dengan-3-varian-berbeda>

Which brands of plant-based milk do you think are good?



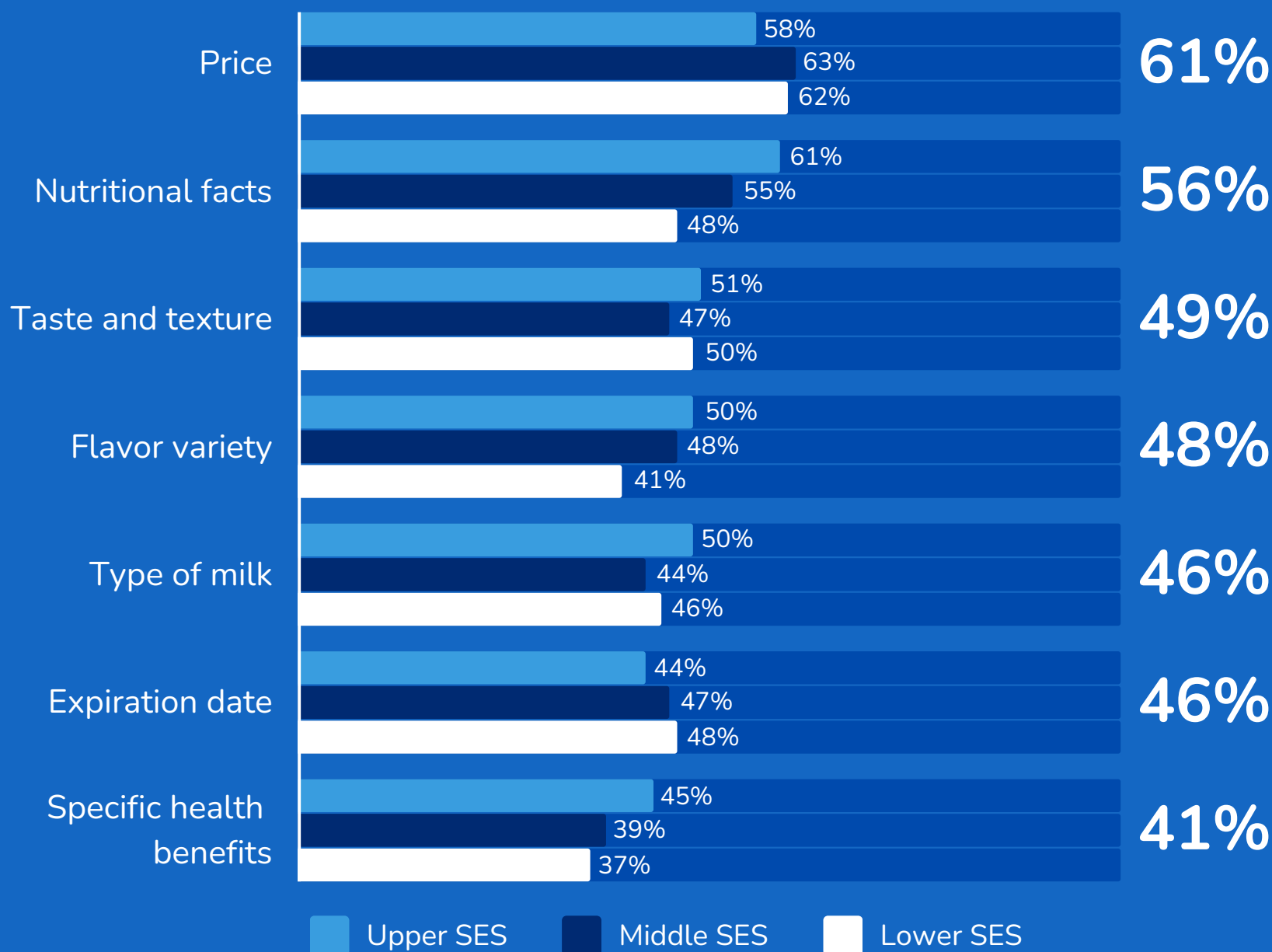
Which brands of plant-based milk do you consume?



Upper SES pays more attention to nutritional facts when purchasing milk

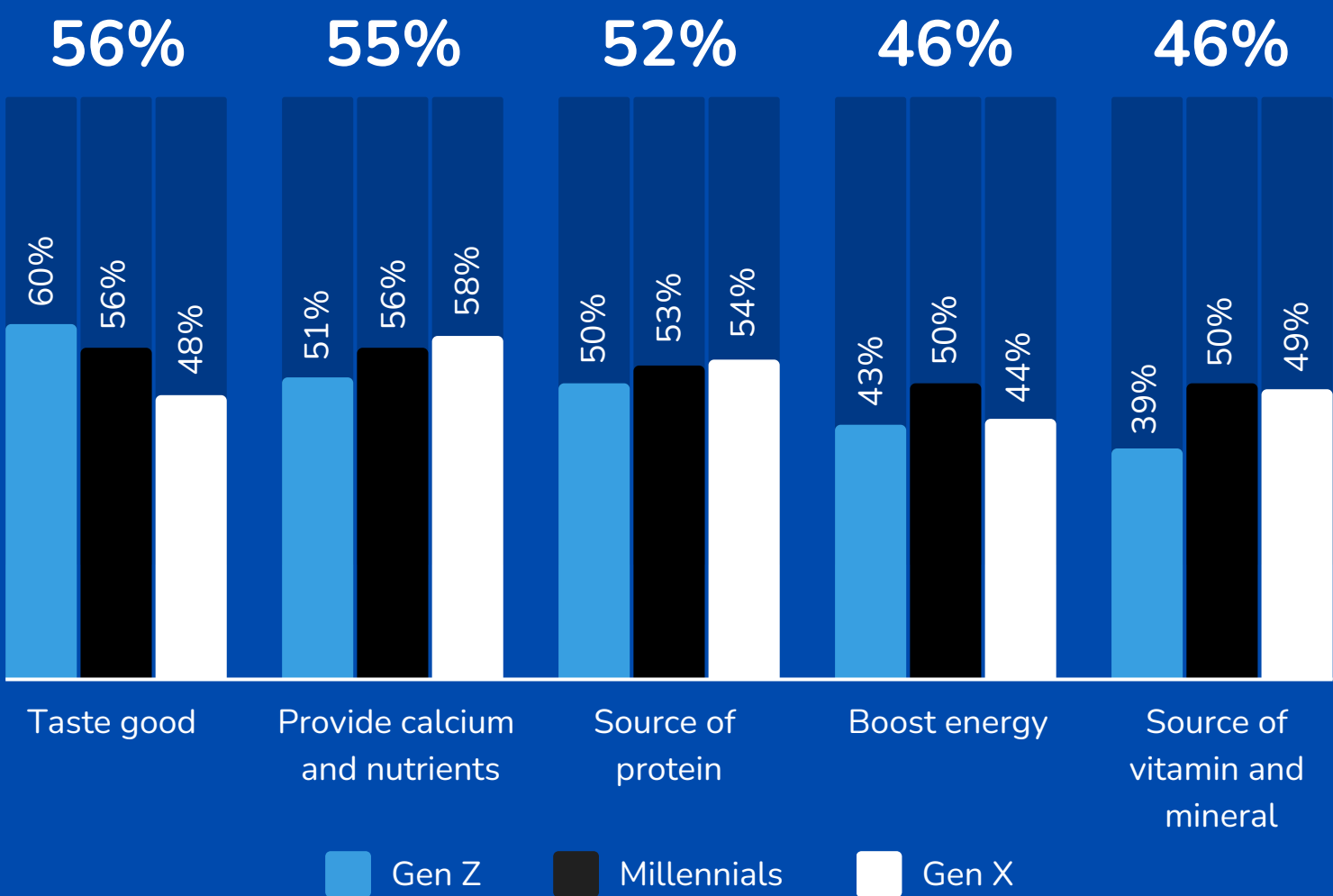
n= 1055 milk consumers

What are your considerations in purchasing milk products?



When purchasing milk, Middle and Lower SES consider the price, while Upper SES pays more attention to the nutritional facts.

What are your reasons for consuming milk?



The most common reason for consuming milk is **its pleasant taste, followed by its ability to give calcium and nutritional needs.**

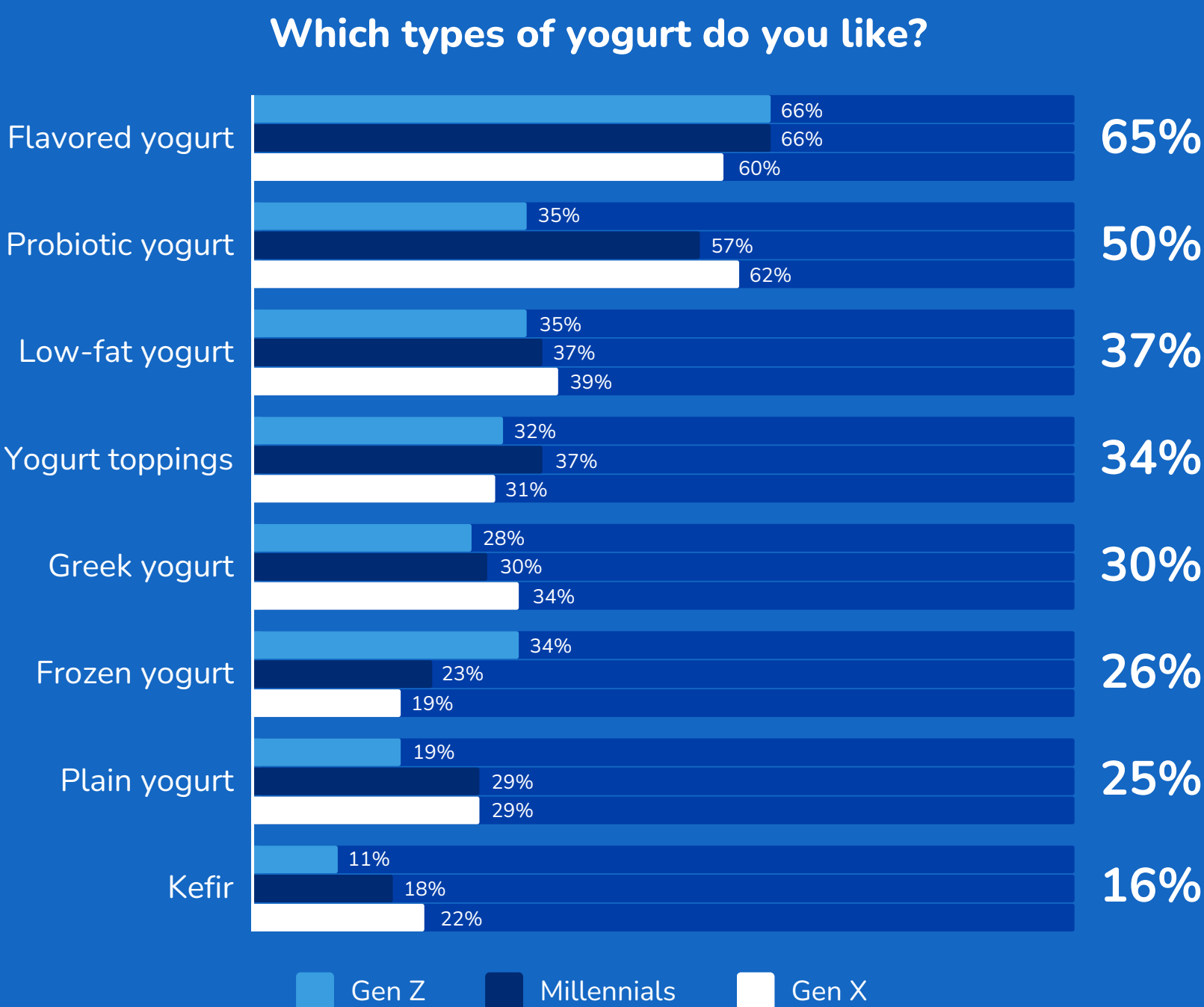
Gen Z mainly point taste as their reason for drinking milk, whereas Gen X tends to highlight the calcium and nutrients that the milk provides.

Yogurt



Probiotic yogurt is less popular among Gen Z

n= 862 yogurt consumers



How do you like to consume your favorite yogurt?



Yogurt is available in various types. **The most popular type, favored by 65% of respondents, is yogurt with added flavors.** The second favorite type is probiotic yogurt, which is preferred by Millennials and Gen X. Gen Z tends to favor frozen yogurt.

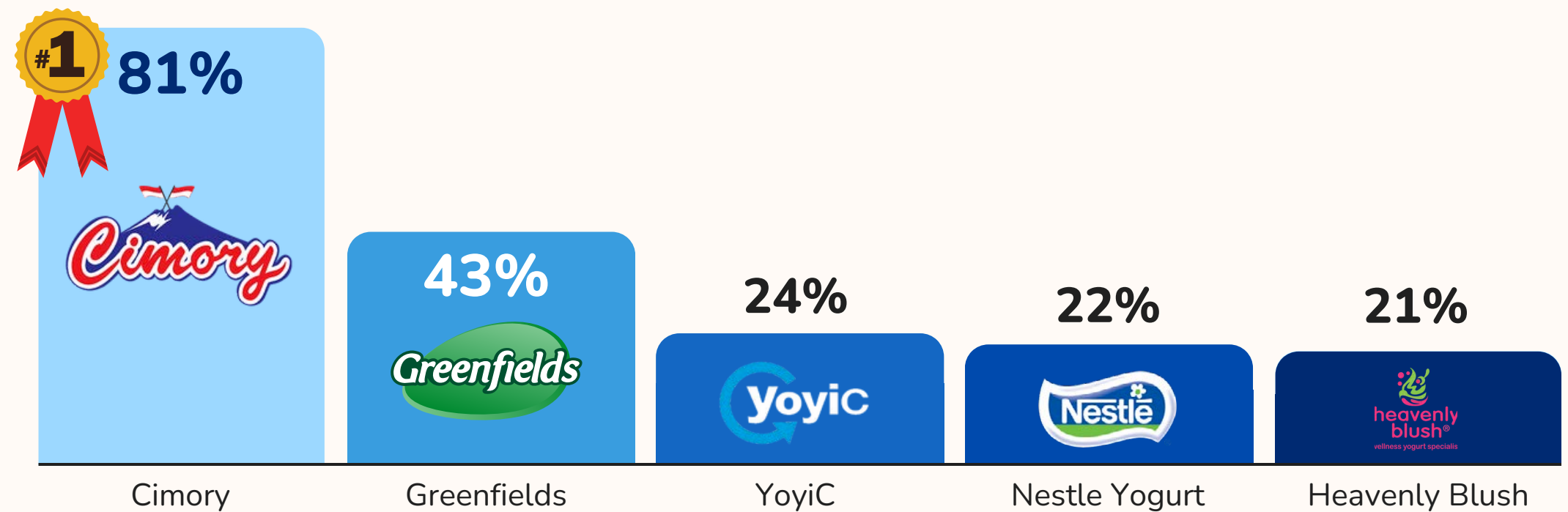
The majority of respondents consume yogurt directly, while 37% of people prefer it frozen, resembling ice cream.

Cimory is the top-consumed yogurt brands

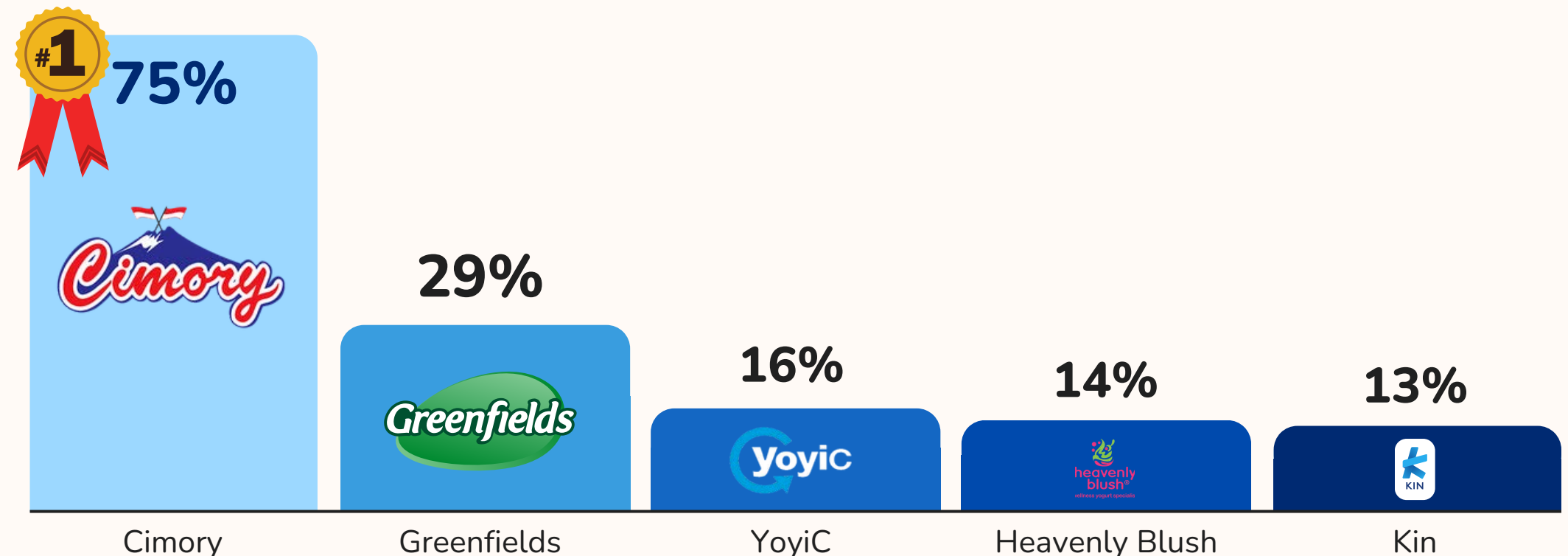
n= 862 yogurt consumers

Among the five yogurt brands mentioned, the top three brands for both brand image and brand usage show the same ranking, with Cimory leading in both categories. While Nestlé yogurt is considered a good brand, it does not rank among the top five most consumed brands.

Which yogurt brands do you think are good?

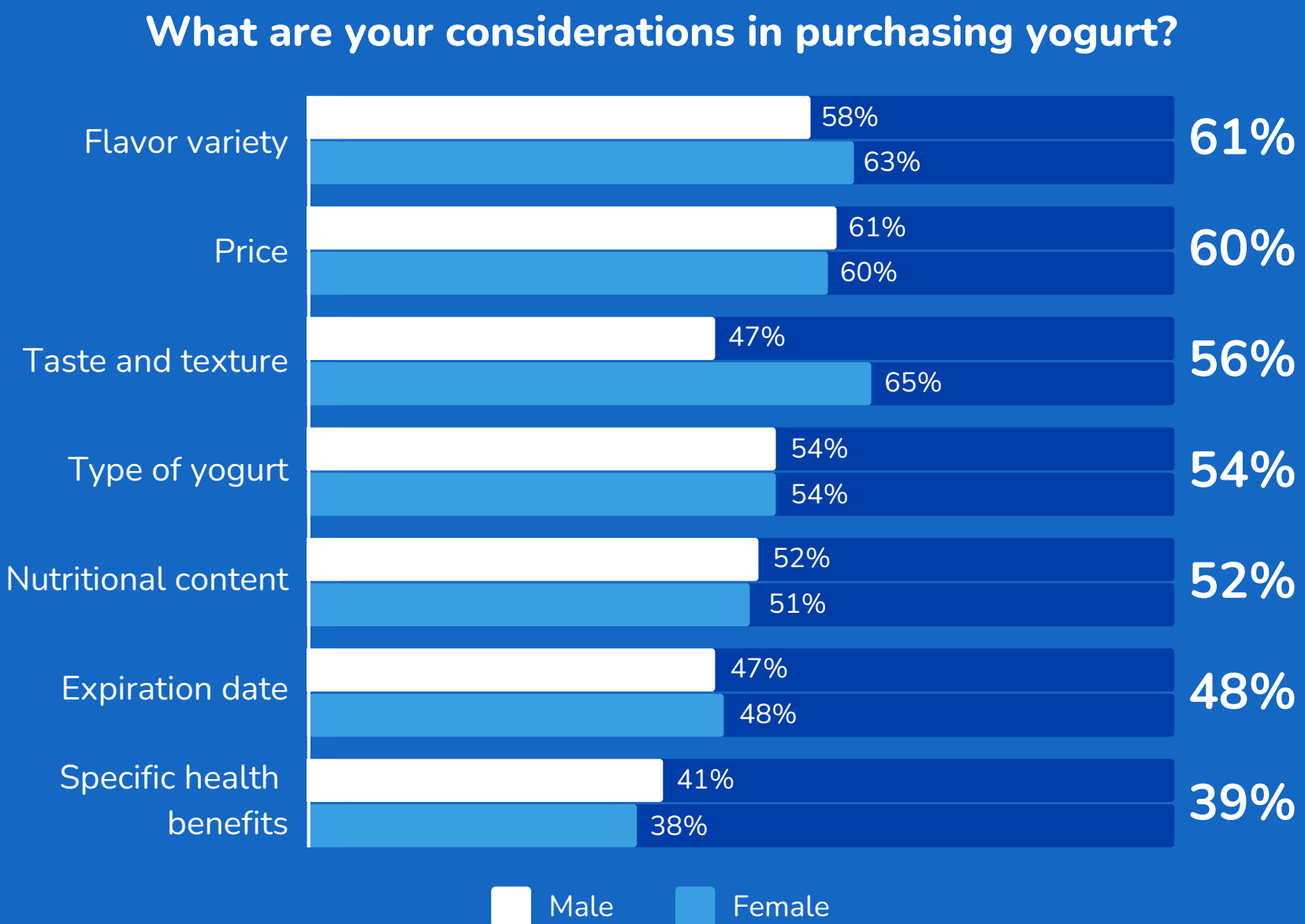


Which yogurt brands do you consume?



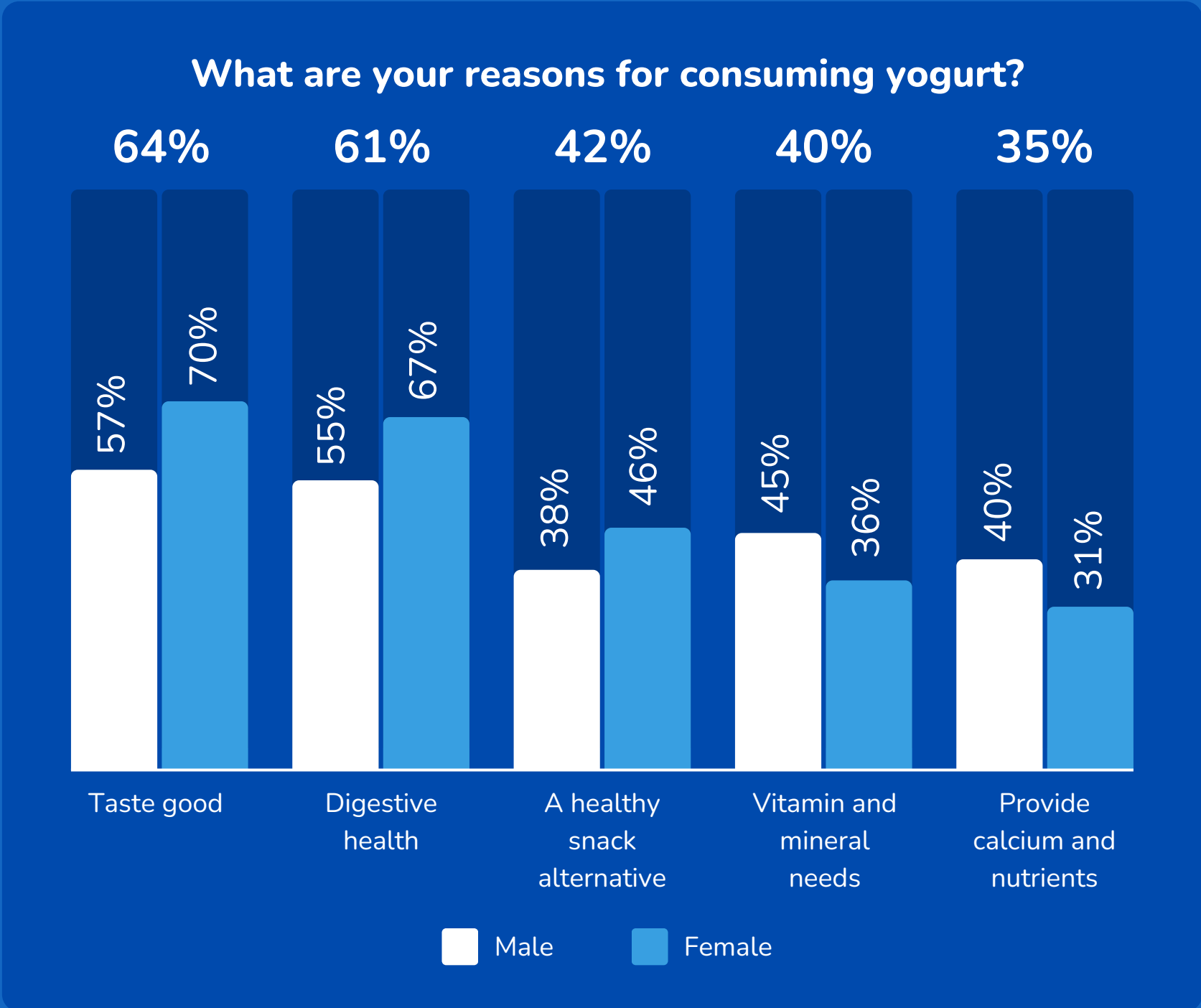
Flavor variety and price are the big considerations when buying yogurt

n= 862 yogurt consumers



The main considerations when buying yogurt are flavor variety and price. Taste and texture also important, with 65% of women prioritizing these factors.

64% of respondents eat yogurt because they enjoy the taste. The next most common reason is for digestive health, which is popular among women. Men, on the other hand, tend to focus more on the nutritional benefits, such as vitamins, minerals, and calcium.

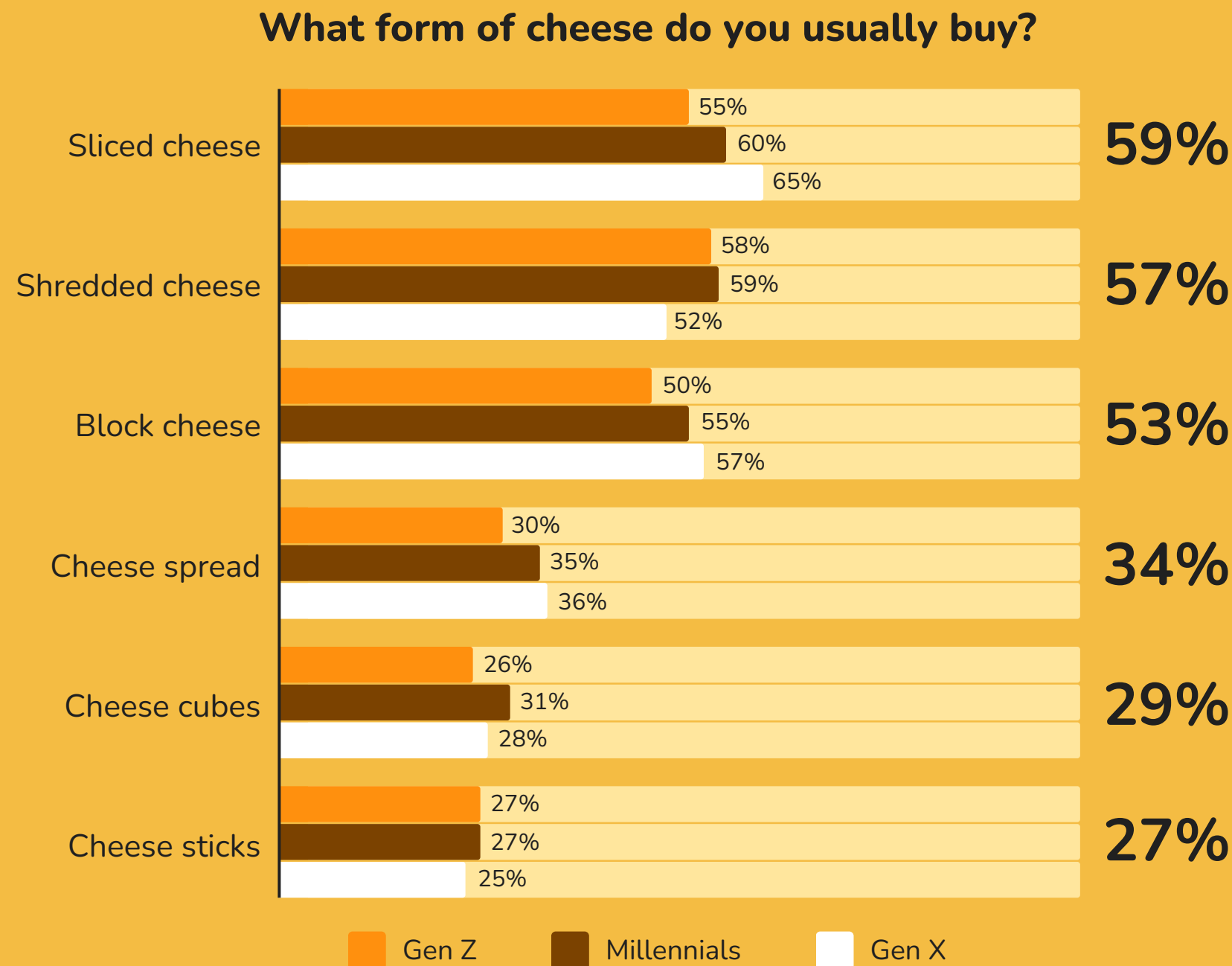




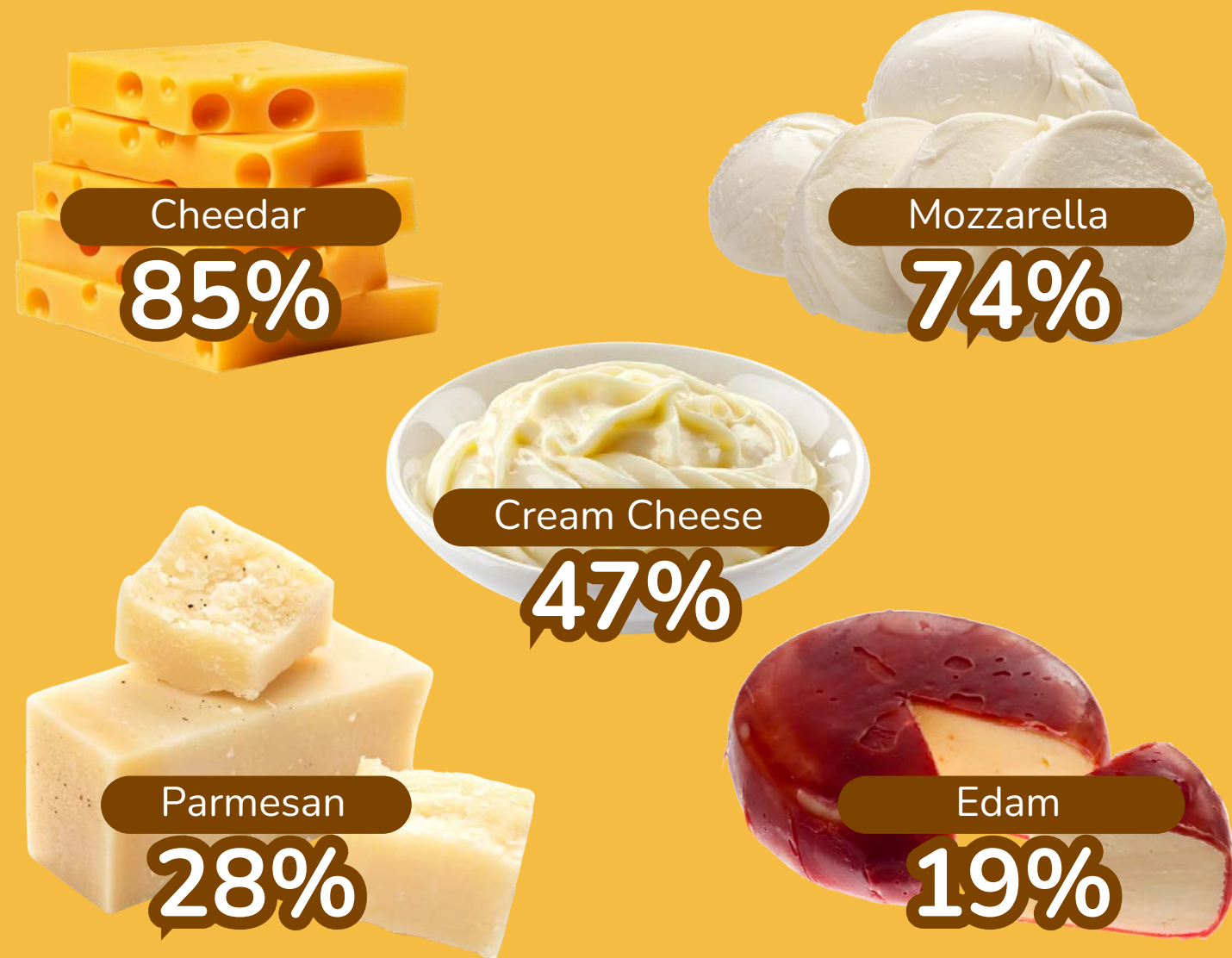
Cheese

Sliced cheese is preferred by 65% of Gen X

n= 810 cheese consumers



Which type of cheese do you prefer?



Sliced cheese is the most commonly bought form, preferred by nearly 60% of consumers. Another popular form is shredded cheese, which is popular among Gen Z compared to other cheese forms.

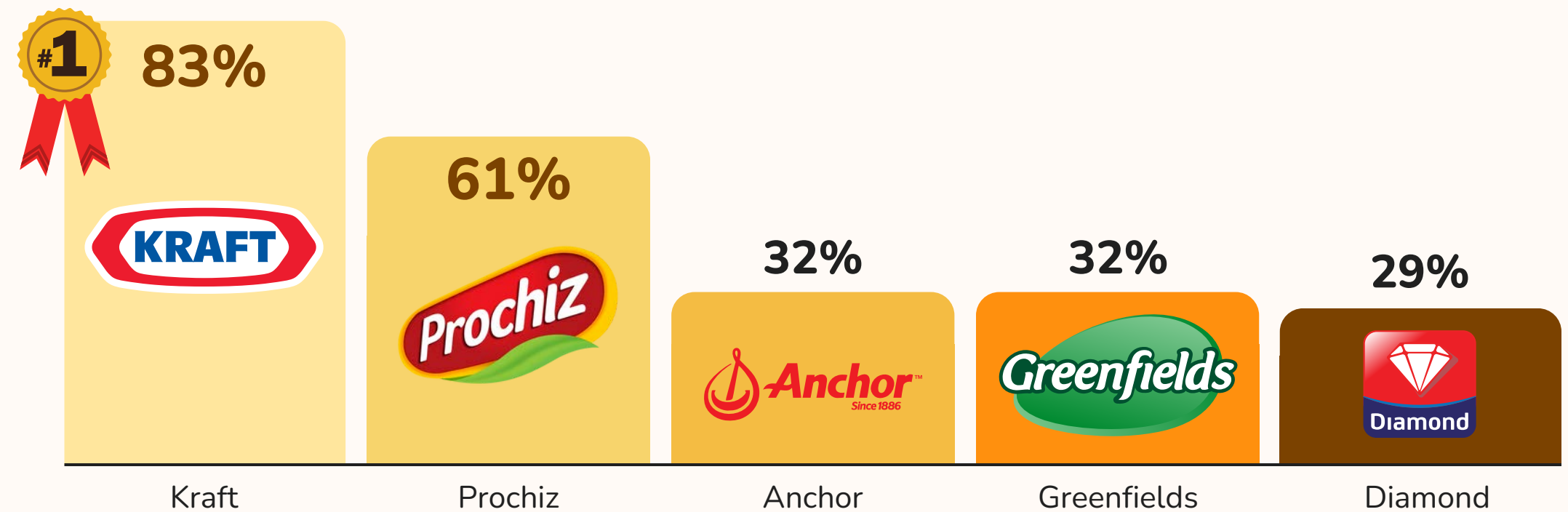
Cheddar and mozzarella are the most popular types of cheese, with a significantly higher percentage compared to other varieties.

Anchor has a good brand image but fewer buyers

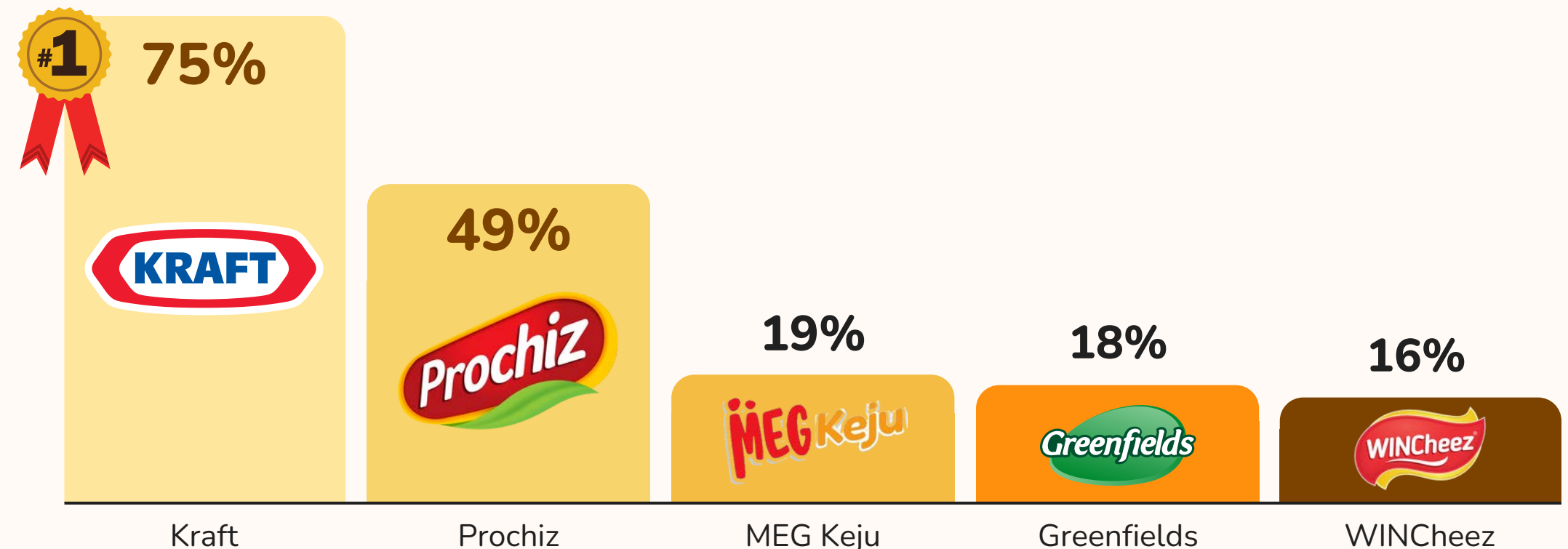
n= 810 cheese consumers

Kraft and Prochiz are the top two cheese brands in both brand image and brand usage. Anchor and Greenfields have the same percentage of brand image but more people use Greenfields. Meanwhile, MEG Keju users are more than Greenfields even though this brand is not included in the top 5 good brand image.

Which cheese brands do you think are good?

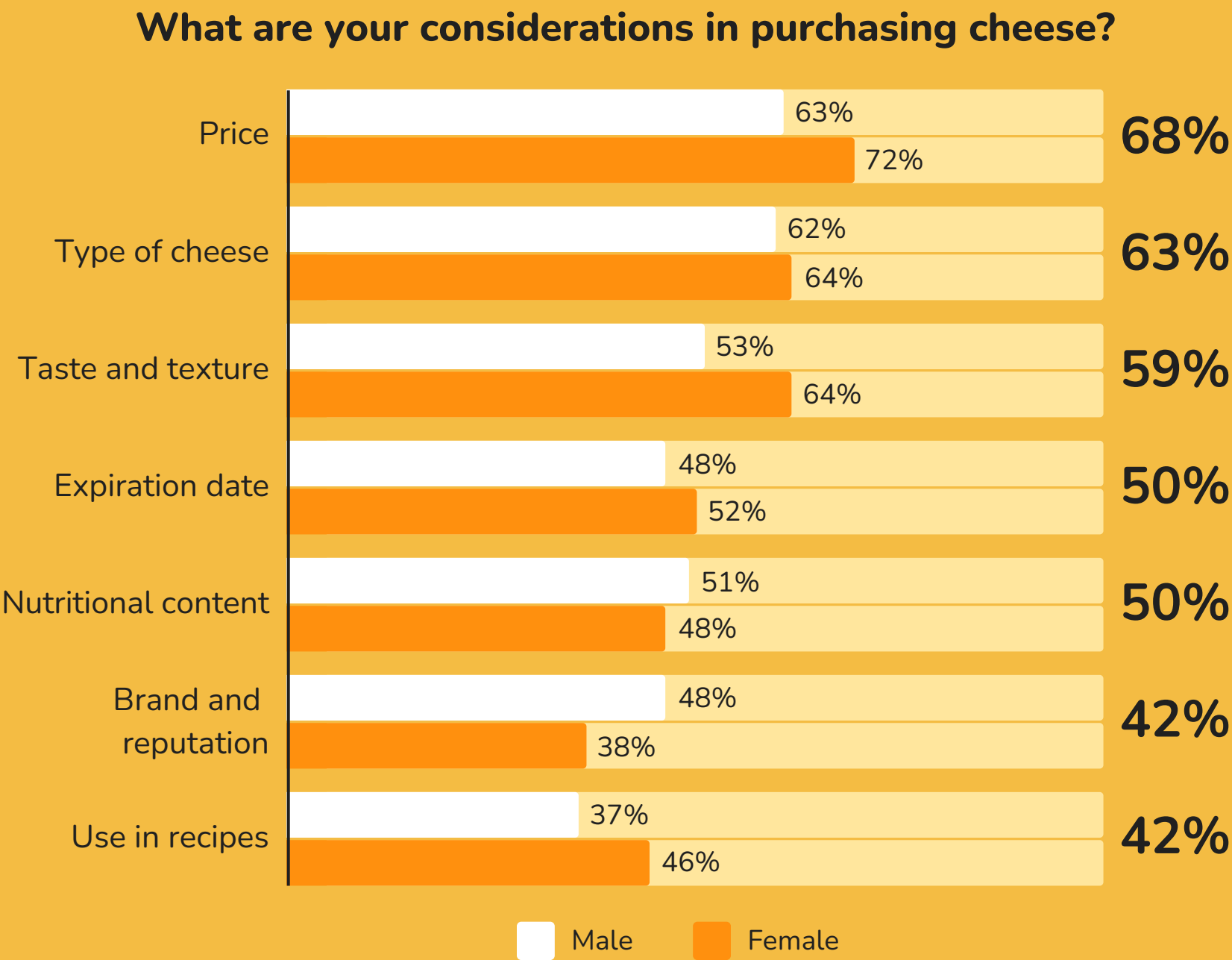


Which cheese brands do you consume?



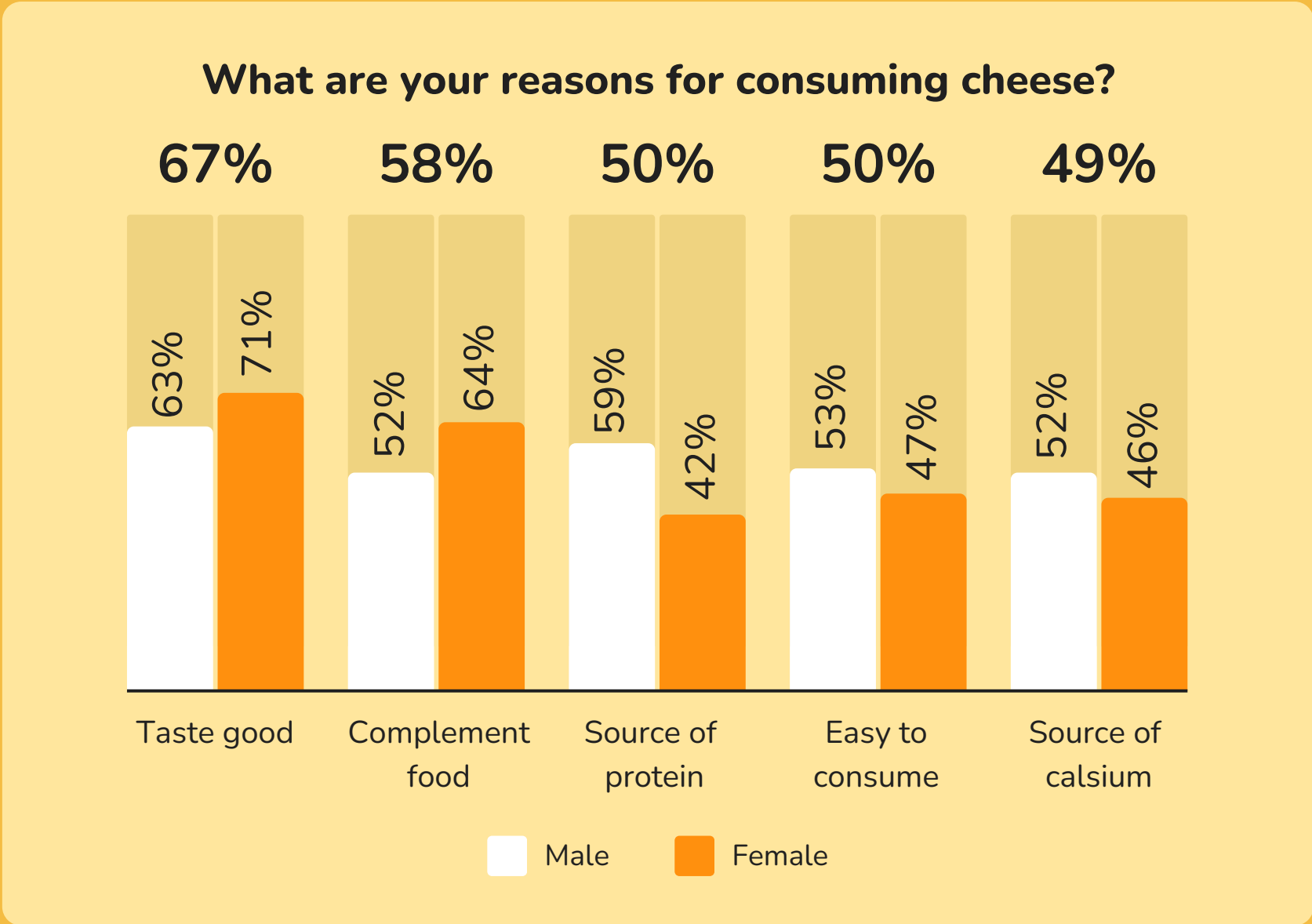
Men pay more attention to the nutrition of cheese

n= 810 cheese consumers



Price remains the top consideration when buying cheese. Taste, texture, and use in recipes are important to women when buying cheese, as they tend to adjust based on the type of dish they are preparing.

The primary reason people enjoy cheese is its delicious flavor. 58% of respondents use cheese to add flavor to food, and this is confirmed by more than half of the women. Men focus more on the nutritional benefits of cheese, such as its protein and calcium content.

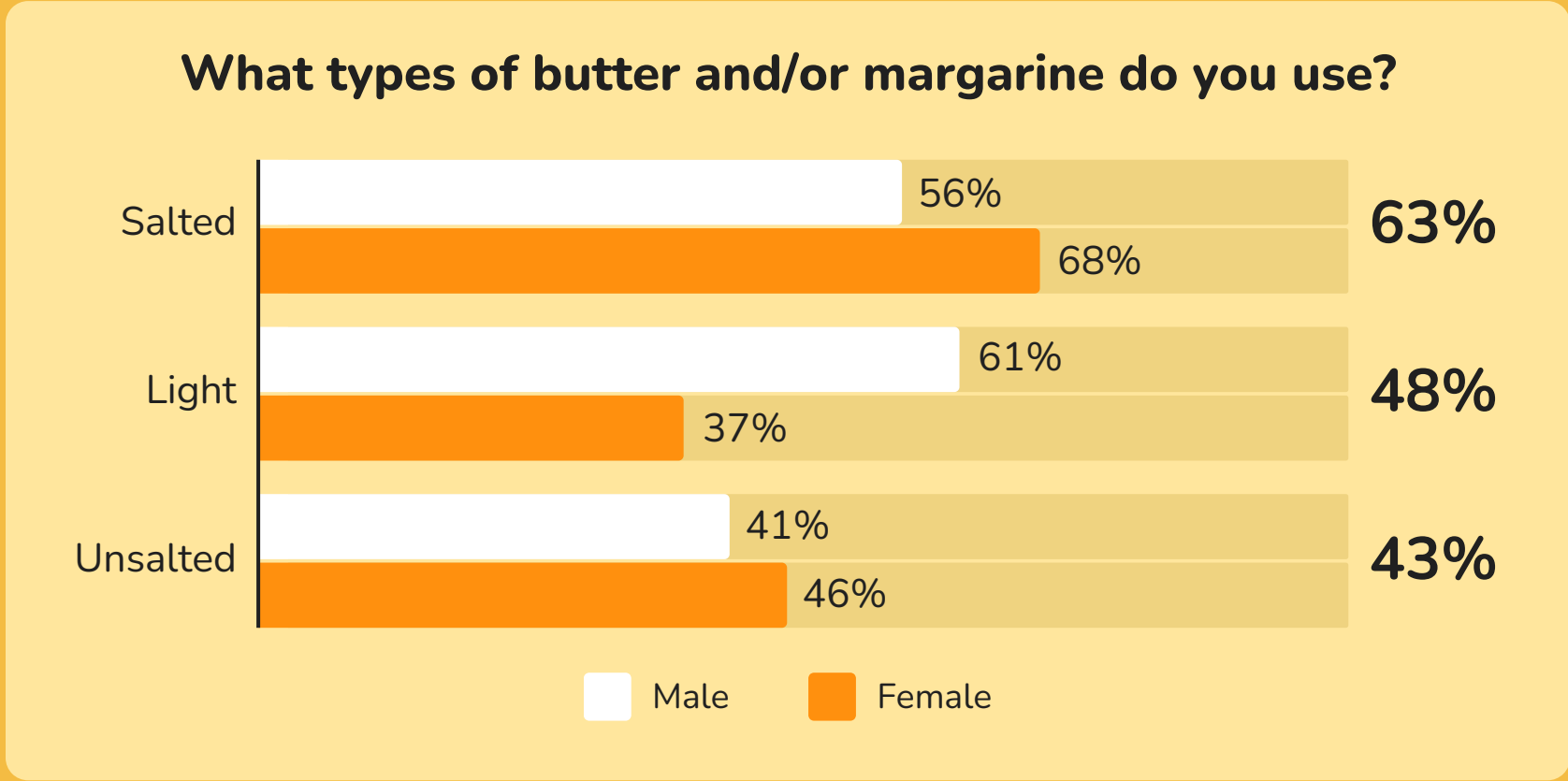


Butter & Margarine



61% of men use low-calorie butter or margarine

n= 713 butter and/or margarine consumers



Salted butter and/or margarine is used by 63% of respondents.
Men mostly prefer the light type, while women choose the salted ones.

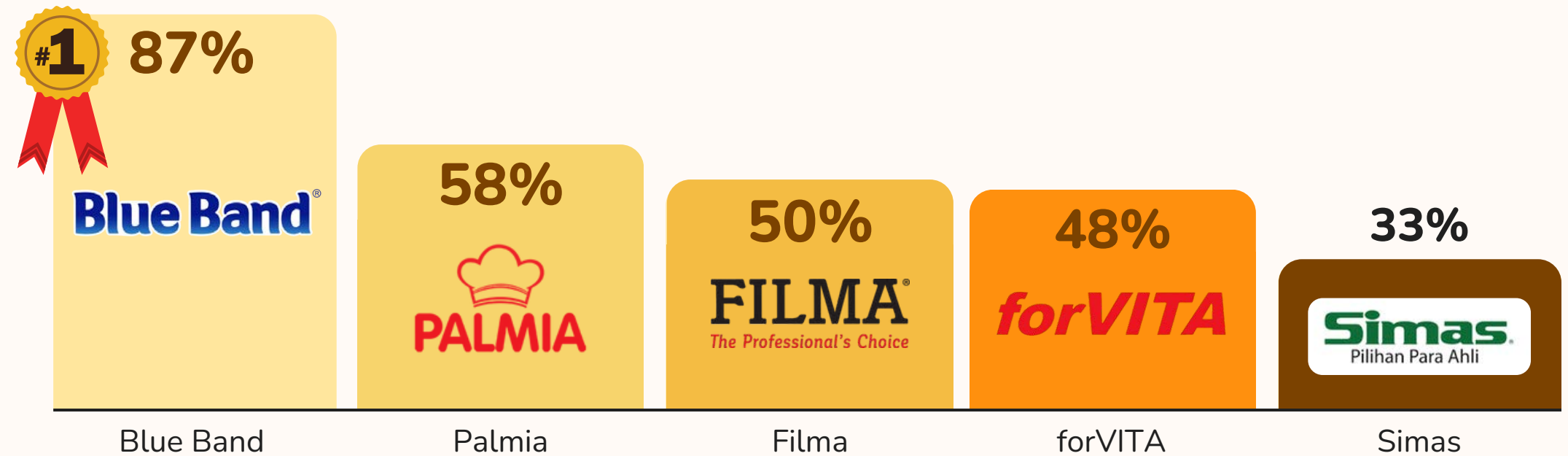


Blue Band has a significantly higher percentage in brand usage

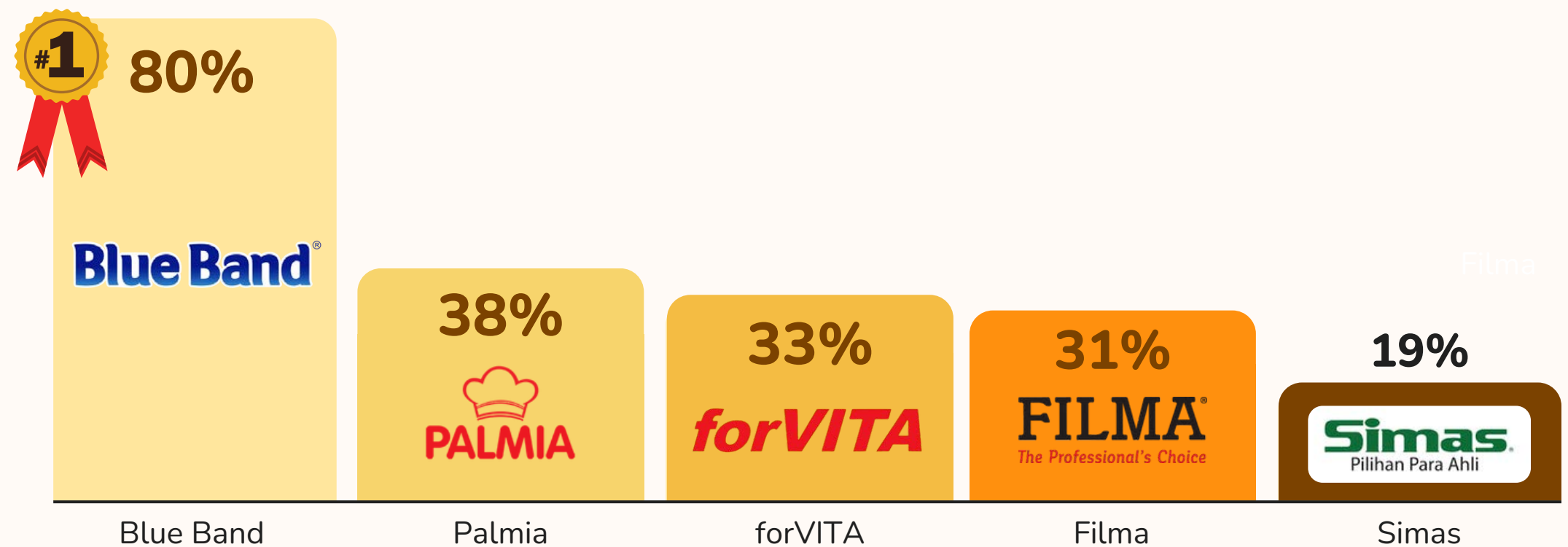
n= 713 butter and/or margarine consumers

Respondents usually buy butter and/or margarine products they consider good, shown by **the same five brands having a good image and being frequently used**. In terms of usage, Blue Band has a much higher percentage than other brands by almost double the ratio. Filma ranks third in brand image, while Forvita holds the same position in brand usage.

Which brands of butter and/or margarine do you think are good?



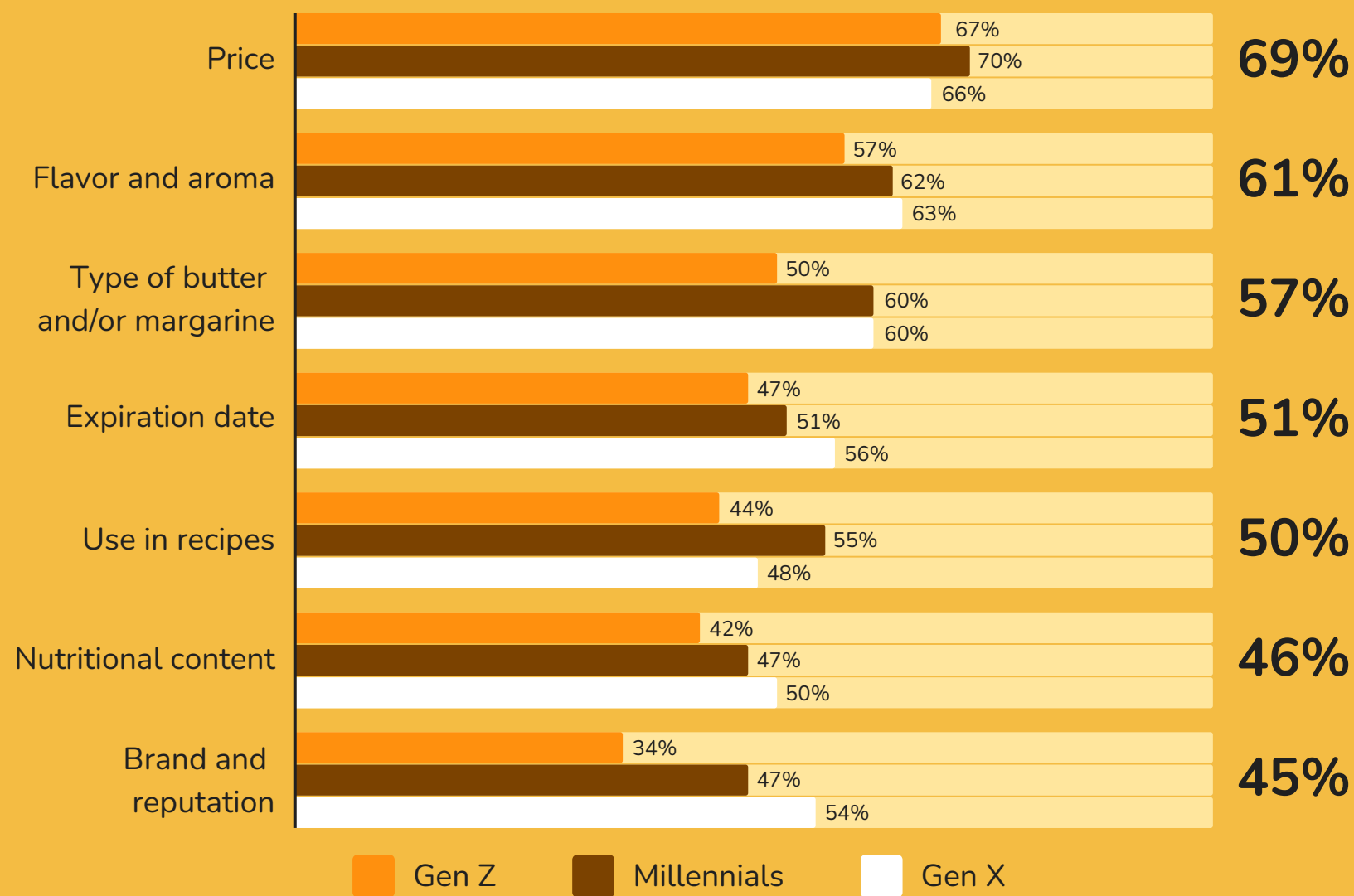
Which brands of butter and/or margarine do you use?



60% of Millennials and Gen X look at the type when buying butter or margarine

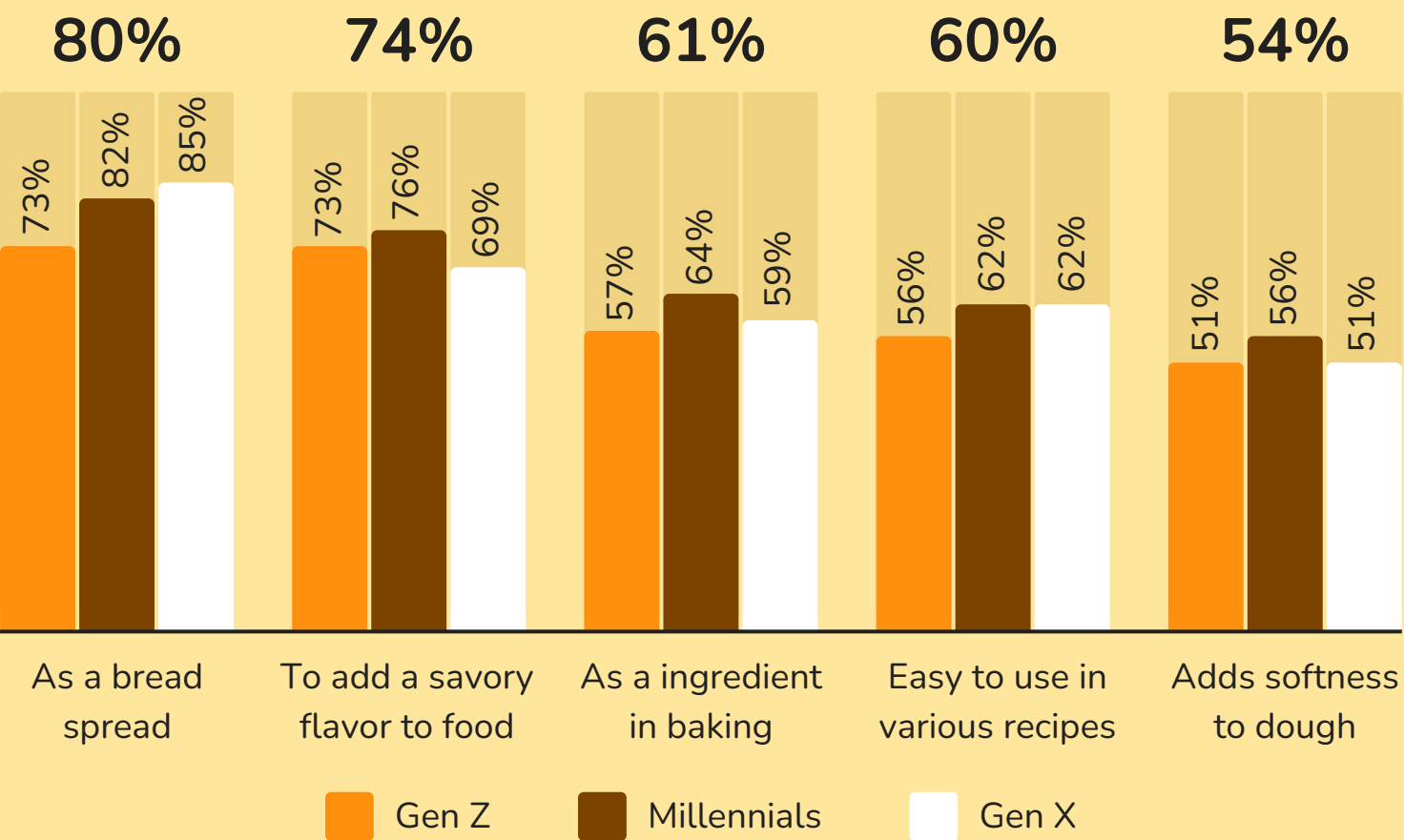
n= 713 butter and/or margarine consumers

What are your considerations in purchasing butter and/or margarine products?



When buying butter and/or margarine, **Millennials tend to consider price, type, and its use in recipes.** Meanwhile, **Gen X pays more attention to health aspects** such as the expiration date and nutritional content.

What are your reasons for using butter and/or margarine?



The main reason for using butter or margarine is as a spread for bread, which is particularly common among Gen X. Adding a savory flavor to food is the next most common reason. About 60% of people use it as an ingredient in baking and in various recipes.

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