

W H I T E F I S H A U T H O R I T Y

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TECHNICAL REPORT 164

Mackerel Research - Omnibus Survey
of Housewives 1976, 77 & 78

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FOREWORD

For the past three years, as part of its on-going programme of research into consumer and trade attitudes towards mackerel, the White Fish Authority has been commissioning quantitative research in the form of annual omnibus surveys in order to determine current usage of the species. The surveys were conducted in July 1976, September 1977 and September 1978.

This report deals with the third of these surveys, and its findings are compared with the findings obtained in the two previous years. The information in the report has been summarised to the extent that certain tables have been omitted, but all the research information is available from the White Fish Authority should it be required.

INTRODUCTION

In conjunction with the White Fish Authority's programme to determine the market potential for mackerel, a third omnibus survey was conducted in September 1978. 2,108 housewives, representing about 19,000,000 households throughout the UK, were interviewed at random to enquire about current mackerel usage.

Following are the results of the national research, compared with statistics from identical surveys commissioned by the White Fish Authority in July 1976 and September 1977.

SUMMARY & CONCLUSIONS

1. Over half (52%) of all the housewives had purchased fresh fish once a month or more often, and 25% of all the housewives bought it once a week. This represents a very slight increase in comparison with 1977. More older housewives in the North and the Midlands bought once a month or more often.
2. The proportion of all the housewives who bought fresh (non frozen) fish and bought mackerel remained fairly constant at 18% compared with 1977 (17%) but was still double the proportion for 1976 (9%). ABC1 housewives in the Midlands and the South were above the national average.
3. Of the 52% of all the housewives who bought fresh fish once a month or more often, 35% of them had bought mackerel, about the same as in 1977 (34%). More 34 - under housewives had bought mackerel in 1978 compared with 1977.
4. Among the housewives who bought mackerel, 40% had purchased it within the last month - a lower figure than the 44% who had bought within the last month in 1977. More housewives had bought the fish longer ago than six months (30% in 1978 vs. 25% in 1977). Overall, among all the housewives who had ever bought fresh mackerel, 43% were ABC1, from the South, aged over 34.
5. Fewer of the housewives served mackerel once a month or more often than in 1977; however, more housewives served the fish one to three times in six months compared with 1977. The most frequent servers were DE's, aged under 55, in the South.
6. Preferred methods of cooking mackerel were grilling, shallow frying and baking. Soused mackerel, which was fairly highly rated in 1976, continued to decline in popularity.

7. 41% of the housewives said their fishmonger stocked mackerel all of the time, identical to 1977. The percentage of housewives who said their fishmonger stocked it most of the time declined from 37% (1977) to 33% (1978). (Although most fishmongers still stock mackerel, at least most of the time, they may not be making much of an effort to 'sell' the fish.)
8. 25% of all the housewives who served fresh mackerel had bought smoked mackerel, a significant increase since 1977. The percentage of those who only bought canned mackerel was slightly down from 1977 and nearly half what it was in 1976. Overall 60% of housewives who served fresh mackerel had bought smoked or canned mackerel.

RESEARCH OBJECTIVES

To determine:

1. How often housewives bought fresh (non frozen) fish
2. How many fish buyers had ever bought mackerel and when they last bought it
3. How often housewives served fresh mackerel
4. The different ways mackerel was prepared
5. Whether their fishmongers usually stocked mackerel
6. How many housewives had tried smoked or canned mackerel
7. Comparative statistics with identical surveys conducted in July 1976 and September 1978.

RESEARCH METHOD

Fieldwork was conducted by telephone during the two weeks 8 - 20 September 1978. A random sample was interviewed with age of housewife, social class, and area being within the Registrar General's Regions controls.

MAIN FINDINGS

All Housewives

52% of all the housewives purchased fresh fish once a month or more often. 24% said they bought fresh fish less often than once a month, and 24% said they never bought/didn't know.

All housewives purchase fresh fish:

	July '76 %	Sept. '77 %	Sept. '78 %
2-3 times a week	3	5	6
Once a week	14	25	26
Once a fortnight	5	8	9
Once a month	6 (28)	11 (49)	11 (52)
Less than once a month	13	26	24
Never buy	60	25	24

The slight increase in the housewives who purchased fresh fish once a month or more often was reflected in all age groups and socio-economic classes. A significant increase was found in the Midlands where 55% of all the housewives bought once a month or more often, compared with 44% for the same area in 1977.

Housewives purchase once a month or more often:

	July '76 %	Sept. '77 %	Sept. '78 %
All housewives	28	49	52
ABC1	29	49	50
C2	28	49	53
DE	25	48	53
34 - under	22	42	44
35 - 54	29	50	54
55 - plus	31	53	57
North	33	58	60
Midlands	27	44	55
South	22	42	44

The proportion of all the housewives who still bought fresh fish and who bought mackerel was 18% for 1978, about the same as the 17% for 1977. There were slightly higher percentages of ABC1 housewives in the Midlands and the South. Compared with 1977, more housewives in the Midlands bought mackerel in 1978, and an increase was registered in the 34 - under age group.

All housewives, buy mackerel:

	July '76 %	Sept. '77 %	Sept. '78 %
All housewives	9	17	18
ABC1	9	21	21
C2	8	14	18
DE	8	14	15
34 - under	6	14	19
35 - 54	9	19	19
55 - plus	10	16	17
North	7	13	15
Midlands	10	15	21
South	10	20	20

Buyers of once a month or more

Of the housewives who bought fresh fish once a month or more, 35% of these had purchased fresh mackerel. ABC1 women in the South were above average. Significantly more 34 - under housewives had bought mackerel in 1978 compared with 1977.

All who buy fresh fish once a month or more:

	July '76 %	Sept. '77 %	Sept. '78 %
Fresh mackerel:			
Have bought	31	34	35
Have not bought	69	66	65

Mackerel buyers

Of the monthly fish buyers who had purchased mackerel, 40% had bought within the last month. Nearly a third (31%) had bought within the last six months, and about the same proportion (30%) bought longer ago than six months. Buying mackerel within the last month declined in comparison with 1977, but remained constant for purchases within the last six months.

Monthly fish buyers purchase mackerel:

	July '76 %	Sept '77 %	Sept '78 %
Within last month	36	44	40
Within last six months	38	31	31
Longer ago than six months	26	25	30

35% of the housewives who bought fresh mackerel stated that they served it once a month or more, and 39% said they served the fish one to three times in six months. The most frequent servers were DE's, aged under 55, in the South.

The frequency of serving mackerel once a month or more often declined from 1977 to 1978. However, more housewives served the fish one to three times in six months in 1978 than in 1977.

Mackerel buyers frequency of serving mackerel:

	once month or more			1 - 3 times in 6 months			once year or less		
	'76	'77	'78	'76	'77	'78	'76	'77	'78
	%	%	%	%	%	%	%	%	%
All mackerel buyers	34	40	35	43	32	39	23	26	26
ABC1	23	36	33	55	33	41	22	30	26
C2	36	42	33	34	33	46	29	26	21
DE	43	47	40	35	29	29	20	24	31
34 - under	39	34	40	45	48	42	16	23	18
35 - 54	27	45	39	48	28	37	24	28	24
55 - plus	39	40	27	35	31	37	26	29	35
North	28	29	26	34	33	49	37	37	25
Midlands	35	40	34	46	38	37	19	21	29
South	36	48	42	47	29	34	17	24	25

Mackerel servers of more than once a year

Housewives who served mackerel more than once a year usually served it grilled (32%), shallow fried (27%) or baked (18%).

Serve mackerel (multiple responses):

	July '76	Sept. '77	Sept. '78
	%	%	%
Baked	20	21	18
Casseroled	2	7	4
Deep fried	11	11	14
Grilled	32	32	32
Shallow fried	21	23	27
Poached	2	6	7
Soused	24	9	8
Other	5	4	4

The favourite method of cooking mackerel was grilling, which was preferred by ABC1's, slightly more in the South than the rest of country. Shallow frying was also preferred mainly by ABC1's, 31% in the South, but also 30% in the Midlands area. 36% of housewives in the 35 - 54 age bracket liked mackerel grilled, as did 36% of housewives in the North. 19% of DE's served deep fried mackerel, the highest percentage being in the North.

Grilled mackerel rated highest in the North (36%), shallow fried mackerel in the Midlands (30%), and in the South grilled (32%) and shallow fried (31%) were almost equal. 12% of Southern housewives served soured mackerel, with insignificant ratings in the North and Midlands.

Mackerel inventory at fishmongers

About three-quarters (74%) of the housewives who served mackerel said their fishmonger stocked mackerel most or all of the time. 9% said that their usual fishmonger never stocked the fish. The fish stocking pattern remained about the same for 1977/78 except for the increase in 'never stocks'.

Fishmonger stocks mackerel:

	July '76	Sept.'77	Sept.'78
	%	%	%
All of the time	36	41	41
Most of the time	37	37	33
Some of the time	15	14	14
Hardly ever	5	2	3
Never stocks	7	6	9

Over half the DE housewives said their fishmonger stocked mackerel all of the time, as did just over half the housewives aged 34 - under. The South had a slightly higher percentage who said mackerel was always stocked (44%) compared with the Midlands (41%) and the North (37%).

Smoked mackerel - Canned mackerel

60% of the housewives who served fresh mackerel had bought smoked mackerel (probably hot-smoked), canned mackerel or both.

Housewives who serve fresh mackerel more than once a year:

Purchase smoked or canned mackerel:

	July '76	Sept.'77	Sept.'78
	%	%	%
Smoked mackerel only	4	18	25
Canned mackerel only	32	19	18
Both smoked/canned	9	18	17
Neither	55	45	40

More ABC1's (30%) and DE's (24%) bought smoked mackerel only than C2's (18%). 30% of the housewives in the South bought smoked mackerel only, compared with 15% in the Midlands and 26% in the North. The percentages of housewives of all classes, in all age groups except 34 - under, and in all areas, who bought smoked mackerel only, increased over 1977.

Purchases of canned mackerel only declined slightly overall since 1977. However, more housewives in the Midlands and the North bought canned mackerel only, with slight increases in the 34 - under and 55 - plus age categories. C2 housewives bought slightly more canned mackerel only.

In 1978 less ABC1 housewives bought both canned or smoked mackerel than in 1977; there was an increase in the number of housewives in the Midlands who bought both.

About the same percentage of ABC1 housewives bought neither. The most significant decrease in the number of housewives buying neither was 51% in the Midlands in 1977 vs. 32% in 1978.

ASK ALL HOUSEWIVES
032 FRESH FISH

1. How frequently do you buy fresh wet fish?
 c 40
 2-3 TIMES A WEEK V }
 ONCE A WEEK X } → 2
 ONCE A FORTNIGHT O }
 ONCE A MONTH 1 }
 LESS THAN ONCE A MONTH 2 } → N
 NEVER BUY/DON'T KNOW 3 }

2. Have you ever bought fresh mackerel for the family?
 c 41
 HAVE BOUGHT V → 3
 HAVE NOT BOUGHT X → N

3. When did you last buy fresh mackerel?
 c 42
 WITHIN LAST MONTH V
 WITHIN LAST SIX MONTHS X
 LONGER AGO O

4. How often do you serve fresh mackerel?
 c 43
 MORE THAN ONCE A MONTH V }
 ONCE A MONTH X } → 5
 2-3 TIMES IN 6 MONTHS O }
 ONCE IN 6 MONTHS 1 }
 ONCE A YEAR 2 } → N
 ONCE EVERY 2 YEARS 3 }
 LESS OFTEN 4 }

5. How do you usually cook mackerel?
 c 44
 BAKE V
 CASSEROLE --- O
 DEEP FRY --- 1
 GRILL --- 2
 SHALLOW FRY --- 3
 POACH --- 4
 SOUSED --- 4
 OTHER WT & CODE → 5

6. Does your usual fishmonger sell mackerel:-
 READ OUT
 ↓
 c 45
 ALL OF THE TIME V
 MOST OF THE TIME X
 SOME OF THE TIME O
 HARDLY EVER 1
 NEVER 2

7. Have you ever bought:-
 READ OUT
 ↓
 c 46
 SMOKED MACKEREL ONLY V
 CANNED MACKEREL ONLY X
 BOTH O
 NEITHER 1