

State of the
Nation Study
2018 UK Report



Introduction

Seafish is a Non-Departmental Public Body set up to support the £10 billion UK seafood industry. It's vision is for a seafood industry that is truly thriving, with a flourishing supply chain and growing product sales. Part of Seafish's mission for 2018-2021 is to help increase seafood consumption across the population.

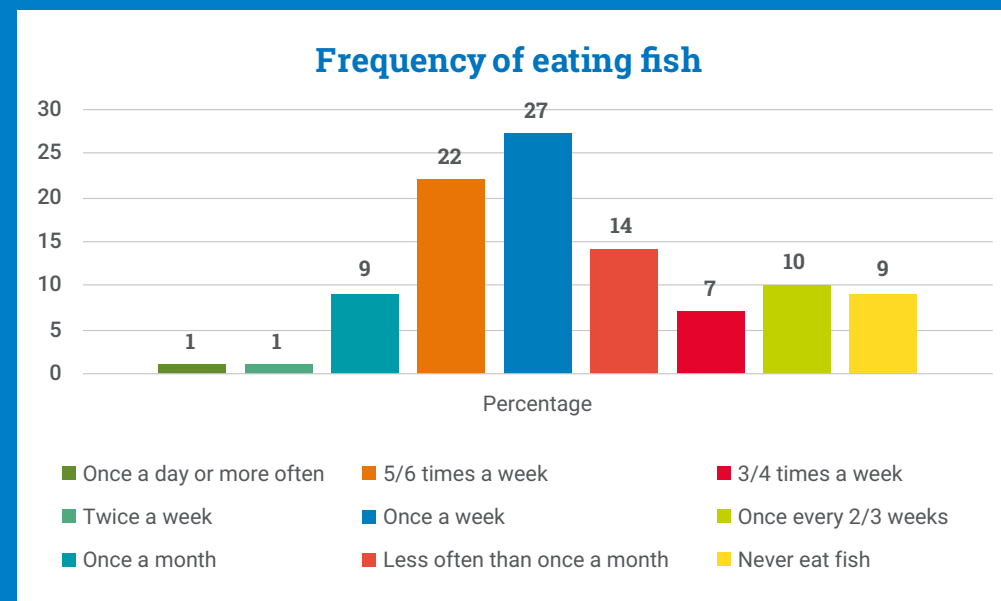
Key to this work is gaining a clearer understanding of consumers' attitudes and behaviours regarding fish and shellfish. Seafish has commissioned this State of the Nation research to gather current information about consumers' consumption habits and use this insight to help highlight the opportunities for industry to increase consumption.

What is State of the Nation?

- State of the Nation is a study commissioned by Seafish and conducted by YouGov in April 2018.
- Using an **online interview** administered to members of the YouGov panel of 800,000+ adults.
- Emails sent to panellists selected at random from the base sample.
- Total sample size of this study was **2047 UK adults**.
- Figures are weighted and are **representative of all UK adults aged 18+**.
- Robust data showing current UK consumption patterns of fish, perceptions of fish, barriers to eating more fish, awareness of species, perceived health benefits of fish, approaches to diet overall, means of encouraging higher fish consumption.
- When referring to FISH, respondents were told we meant "any type of fish, seafood or shellfish".

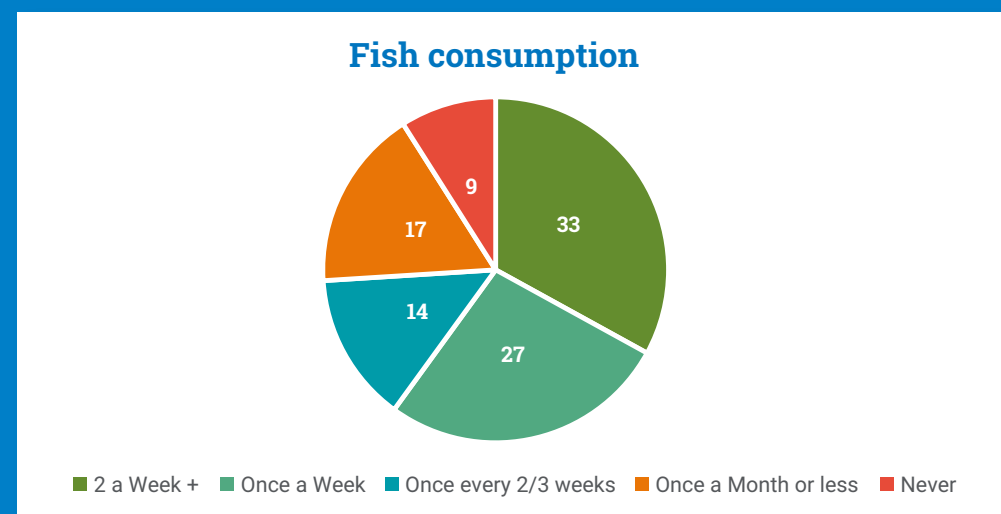
How often does the UK population eat fish?

- Encouragingly, **33%** of the UK population eats fish twice a week or more often.
- However 9% of the population **never** eats fish.



Base: All UK adults (2047).

- This means that 67% are **not** following UK public health guidelines to eat fish at least twice a week or more often.
- According to the NHS and health professionals, the recommendation is that "a healthy diet should include two portions of fish a week, of which one should be oily".



Base: All UK adults (2047).

Do older people eat more fish? Yes they do!

- The 55+ age group are almost **twice** as likely to be eating fish twice a week or more than the 18-24 age group.

Age group (years)	Percentage eating fish twice a week or more often (%)
18-24	23
25-34	24
35-44	28
45-54	30
55+	42

Base: All UK adults (2047).



What about those who do not eat fish at all?

We found that 9% of respondents did not eat fish at all. Of these, 42% were vegetarian or vegan, so **out of the market** for the purchase and consumption of seafood.

The remaining non-fish eaters gave the following reasons why they did not eat fish:

- 44% do not like the taste.
- 31% do not like the smell.
- 18% do not like the texture.
- 13% do not like the appearance.
- 8% are worried about bones.
- 4% say family do not like fish.
- 3% don't know how to cook fish.
- 2% say it's too expensive.
- 2% say they are not confident cooking it.
- 5% said no particular reason.

Base: All UK adults who do not currently eat fish (181)

- Many of these reasons given are insurmountable.
- Some people just simply **do not like fish**.
- The seafood industry's time and effort would be better spent persuading those who **do** eat fish to eat it more often, rather than trying to convert non-eaters.

Where do consumers eat fish?



- 95% of UK adults who eat fish **eat it at home**.
- 57% of UK adults who eat fish **eat it out of home**.

Base: All UK adults who eat fish (1855).

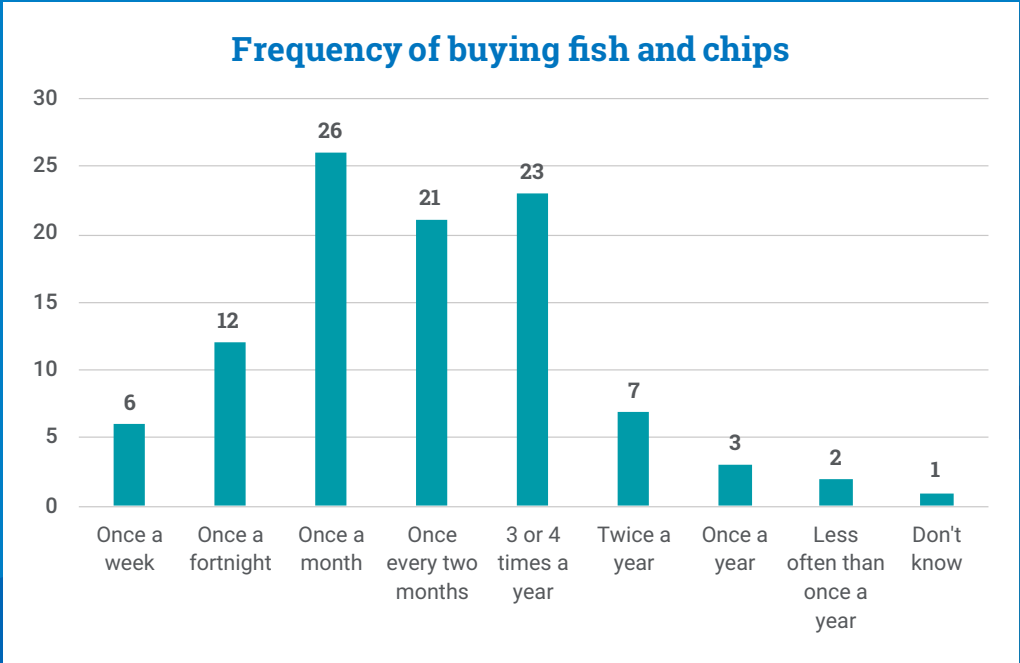
Out of home eating

- The most popular out-of-home venue for eating fish is a restaurant or café (81%).
- 76% of those who eat fish out of home are using fish and chip shops/vans or kiosks.
- 58% eat it while on holiday.
- 38% said the supermarket.
- 20% said sandwich bars.
- 11% said work or school.
- 10% said a fast food outlet.

Base: all UK adults who eat fish outside their home (1067).

The popularity of fish and chips

- Fish and chips is still a popular choice.
- **44% of adults eat it once a month or more often** (this climbs to over 50% for the over 45 age groups).
- 21% of adults eat fish and chips once every couple of months.
- And a further 23% eat it three or four times a year.
- Fish and chips are becoming more expensive but still enjoyed by consumers.
- It is being considered as more of a treat now than a completely regular event for some people.
- For those holidaying in the UK it's a popular meal.
- It's a crowd-pleaser.
- It's reasonably healthy compared to other takeaways like calorific pizzas or curries.



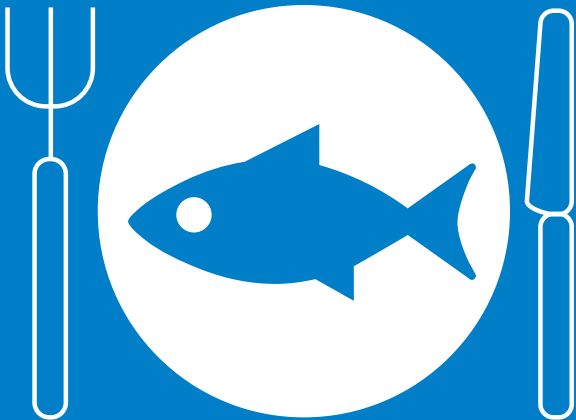
Base: all adults who have eaten fish in a fish and chip shop/van/kiosk (811).

What do consumers buy when they visit a fish and chip shop?

We asked consumers what type of fish they bought when they visited fish and chips shops:

- 83% Cod (N.B. in Scotland Haddock trumps Cod 80% to 47%).
- 60% Haddock.
- 20% Scampi.
- 16% Plaice.
- 10% Pollock.
- 9% Hake.
- 3% Coley.

Base: All UK adults who eat fish at a fish and chip shop/ van/kiosk (807).



What types of fish do consumers eat (both at home and outside the home)?

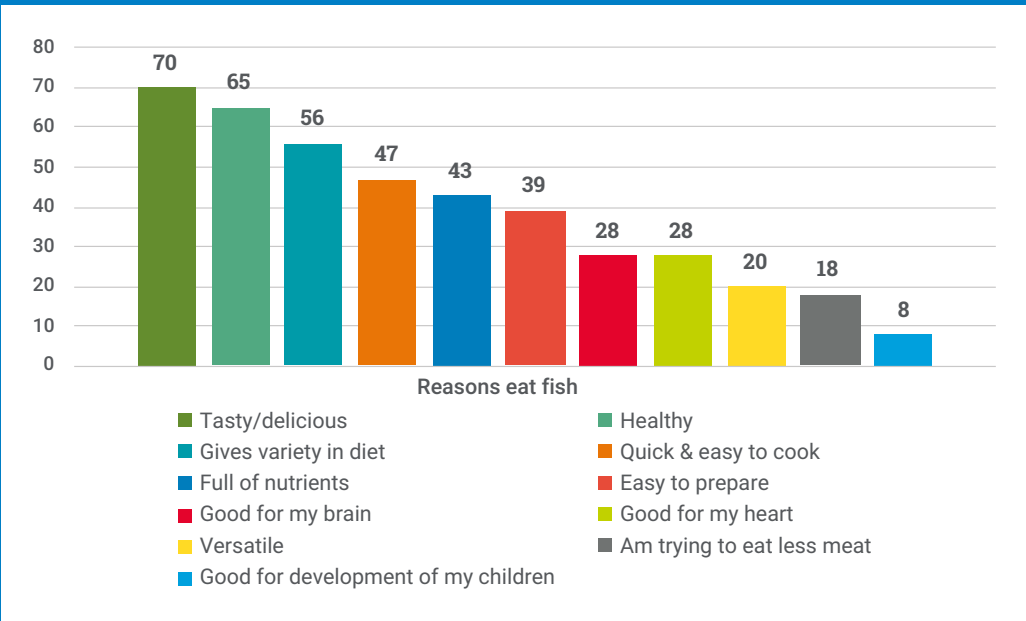
- **Tinned (61%) and battered fish (59%) were the most popular choices here.**
- This was followed by **breaded (50%) and natural, plain fillets (also 50%).**
- Smoked fish was popular at 45% as was shellfish at 43%.
- The perennial fish finger notched up 41% followed by fish cakes at 37%.
- Newer seasoned fish products were mentioned by 25% of the sample.
- **Sushi had 16%** of respondents consuming it; it is worth noting the bias in the 25-45 age group towards this type of seafood at c.24%.
- Fish in sauce was mentioned by 15% and the newer product of fish **with** a sauce (in the style of the Saucy Fish Co.) was mentioned by 14%.
- So, while the traditional types accounted for the bulk of consumption it is good to see newer, more innovative formats making ground.
- This interest in newer, more exotic formats reflects increased consumer interest in foreign cuisines and tastes.

Type of fish	Percentage type of fish eaten in and out of home (%)
Tinned	61
Battered	59
Breaded	50
Natural, plain fish	50
Smoked, plain	45
Shellfish	43
Fish fingers	41
Fishcakes	37
Seasoned fish	25
Sushi	16
Fish in a sauce	15
Fish with a sauce	14
Sticks	12

Base: all adults who have eaten fish in a fish and chip shop/van/kiosk (811).

Reasons for eating fish (prompted)

- Taste and health dominate people's reasons for eating fish.
- These are allied with adding variety to diet.
- The health benefits specified in fig.10 **always** accompany taste when talking about reasons for eating fish.
- This happens **less so** with meat.
- **People know fish is good for them.**



Base: All UK adults who eat fish (1761)

How is fish cooked at home?

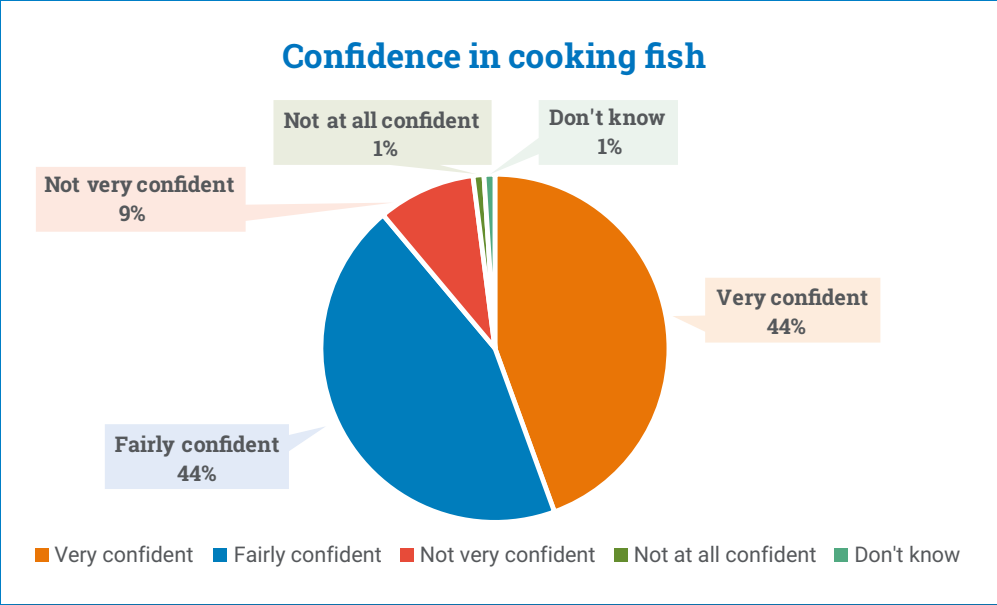
- Here we found that the most **popular** method of cooking fish at home was **baking in the oven** (61%).
- This was followed by **grilling** and **frying**, both at 12%.
- Baking in the oven is the preferred way of cooking fish at home because:
 - There is less smell.
 - Less handling of the fish required.
 - A fool-proof cooking method.
 - No mess, less cleaning up.

Cooking method	Percentage cook fish this way at home (%)
Bake in oven	61
Grill	12
Fry	12
Poach	4
Microwave	4

Base: All UK adults who eat fish (1761).

Are consumers confident about cooking fish?

- Consumers' confidence depends on their age group.
- When we look at **overall** consumer confidence then the vast majority (88%) **are** confident when it comes to cooking fish, as shown below:



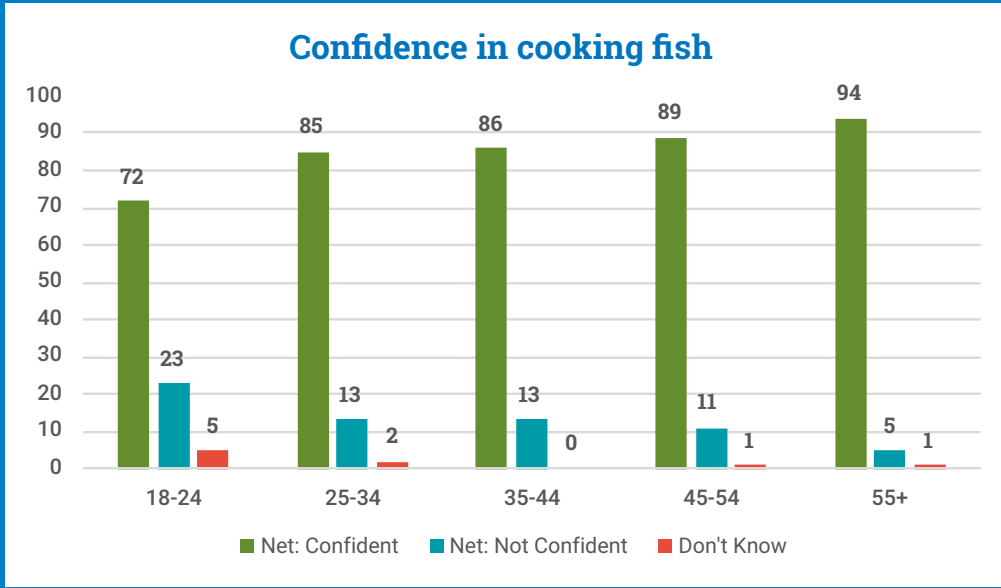
Base: All UK adults who cook fish at home (1685).

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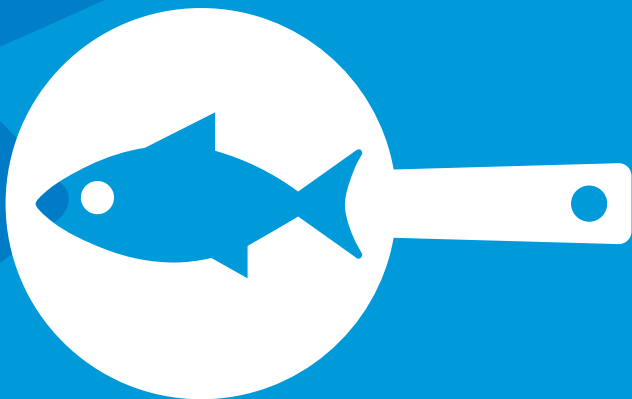
Are consumers confident about cooking fish?

- However, when we look at the responses by age group we see marked reductions in these levels of confidence, especially amongst the youngest age group surveyed, the 18-24 year olds.
- Only 72% of this age group were confident in cooking fish, compared to 94% in the 55+ age group.



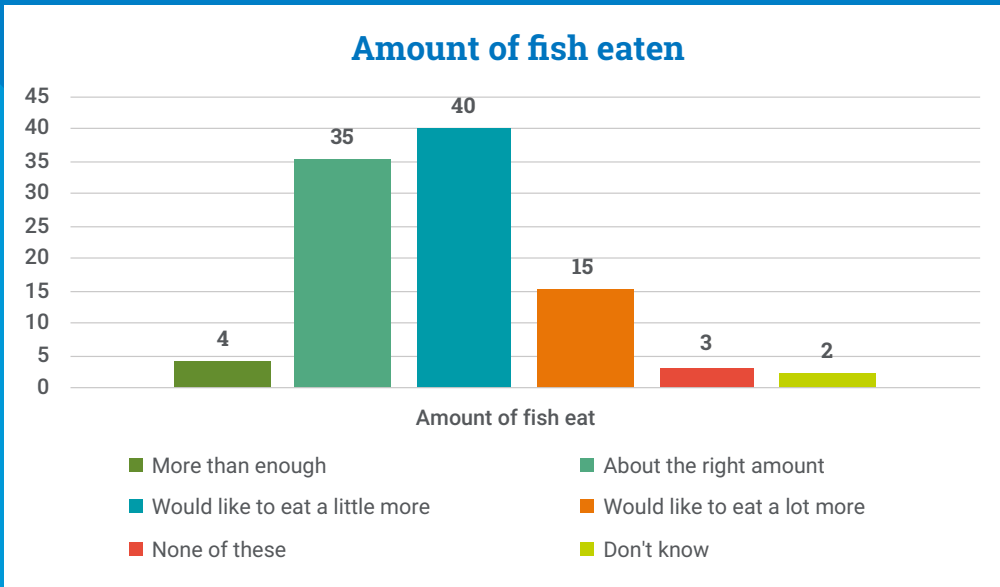
Base: All UK adults who cook fish at home (1685).

- This demonstrates there is a definite need to address the lack of confidence in younger consumers when it comes to cooking seafood.
- Qualitative research shows they are hindered in their consumption by both budget and the lack of knowledge and skills regarding the safe cooking of fish.



Would consumers like to eat more fish?

- Our research reveals that over **half** (55%) of consumers would like **to eat more fish** (either a little or a lot more).
- A third of the population (35%) say they “eat about the right amount of fish”.



Base: All UK adults who eat fish (1855).

What types of fish do consumers eat at home?

When asked what type of fish they ate at home the results were as follows:

- 72% frozen fish.
- 70% fresh fish.
- 67% tinned fish.
- 42% takeaways.

(Base: All UK adults who eat fish at home (1761)).

- Here we see frozen, fresh and tinned fish enjoying a reasonably similar level of popularity when it comes to eating fish at home (tinned is slightly lower at 67%).
- However we see a remarkably high figure for the takeaway fish eaten at home at 42%, demonstrating the popularity of this type of fish.
- Even if they are lacking the skills or inclination to cook fish at home for themselves, consumers are happy for someone else to cook and deliver for them (takeaway fish also includes curries and pizzas, as well as fish and chips).

Brands of fish trusted for in-home consumption

- Birds Eye enjoys the most traction here amongst consumers with 30%, followed by Young's, with 17%.
- Interestingly, trust in supermarket own label ranges in general ranks third in terms of brands trusted for consumption at home (9%).

Responses to the question: Which brands of fish, if any, do you trust when eating fish at home?	
30% Birds Eye	4% Marks & Spencer
17% Young's	3% Morrisons
9% OL General	3% Asda
7% Tesco	3% Aldi
7% Sainsbury's	3% Princes
7% John West	2% Iceland
5% Waitrose	

Fresh, chilled fish – where is it bought?

- The most popular place for consumers to buy fresh, chilled fish is pre-packed from the chiller counter (78%), followed by the supermarket fish counter (57%).
- 24% shop for fresh, chilled fish at an independent fishmongers.
- 10% buy their fish online.
- Fish or street market (12%), fish vans (6%) and from the harbour (5%) are the other places consumers purchase fresh, chilled fish from.

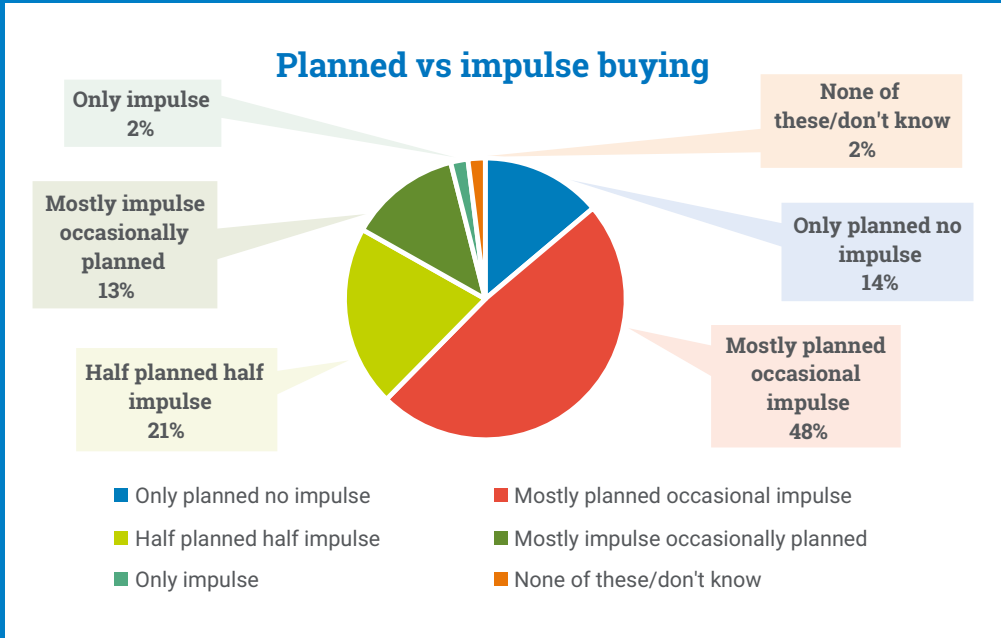
Frozen fish – where is it bought?

- It is not surprising to see that the vast majority of frozen fish was bought in-store at a supermarket (93%).
- Frozen fish demonstrates a completely different purchase mode for consumers:
 - Stored in freezer.
 - No or very minimal concerns re freshness.
 - Product can be stored in the freezer for a long time.
 - Consumers buy on preference and offers.
 - Consumers will bulk buy if there is a good deal on popular products.
- 11% of frozen fish was being bought online.

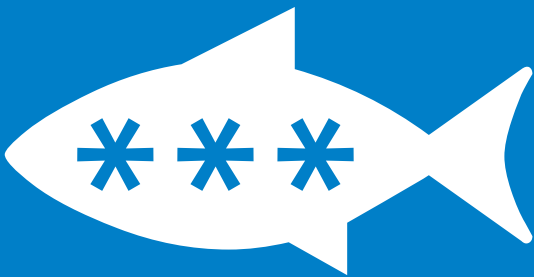


Fresh fish – planned or impulse buying?

- Most fresh fish buying is **planned** with 62% of consumers saying they either only ever buy when they plan to, or mostly buy when planned and then occasionally buy on impulse.
- However the research shows a third of consumers are **open** to impulse buying of fish.
- This demonstrates retail point of sale opportunities to entice consumers in-store via offers, recipes ideas, etc.



Base: All UK adults who eat fresh fish at home (1228).



Fresh Fish – Which stores used

- The stores used by our respondents to buy fresh, chilled fish were dominated by the big four supermarkets of Tesco, Sainsbury's, Morrison's and Asda.
- Tesco was highest at 50%.
- Sainsbury's was next at 43%.
- Morrisons was third at 35%.
- Then Asda at 27%.
- Responses also demonstrate the relative strength of Aldi (24%), Marks and Spencer (22%) and Waitrose (21%) in terms of the market share for fresh, chilled fish.
- Lidl was at 18%, followed by the Co-Op (10%), Iceland (9%) and finally Ocado with 2%.

Base: All UK adults who buy fresh fish from a supermarket (1149).

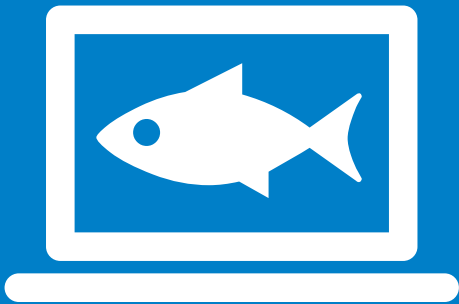
Frozen fish – which stores used

- As with fresh fish, the big four supermarkets dominate with Tesco again leading mentions from respondents (50%).
- Second was Sainsbury's with 35%.
- Joint third was Asda and Morrisons at 29%.
- Perhaps unsurprisingly for this market, Iceland was mentioned by 26%.
- The findings again demonstrate the comparative strength of Aldi at 25%, with Lidl following at 19%.
- Waitrose (12%), MandS (11%), the Co-Op (8%) and Ocado (2%) make up the rest.

Base: All UK adults buying frozen fish from a supermarket (1212).

Buying fish online

- We explored the online market for fish in this study, recognising that this market will probably increase over time.
- In past consumer studies we have found barriers to buying fish online based on:
 - Concerns regarding freshness.
 - Concerns about shelf-life.
 - Difficulties gauging portion size and how much fish to buy (e.g. how many grams is a serving? How much does a whole fish weigh?).
 - Not being able to **see** the fish before buying; in-store shoppers often look through a number of packs of pre-packed fish before selecting the pack they are happiest with.
- Here we wanted to take the opportunity to gain further insight into current consumer attitudes and shopping habits regarding the purchase of fish online as opposed to in-store.



How much fresh fish is bought online?

- 10% of our sample of consumers were buying fresh fish online.
- Of that 10%, only a third (32%) were buying all or most of their **fresh** fish online.

How often buy fresh fish online	Percentage how often buy fresh fish online (%)
All of it	8
Most of it	24
Around half	24
Only some	30
Not very much	22
Don't know	3

Base: All UK adults who buy fresh fish online (124).

How much frozen fish is bought online?

- Amongst those buying frozen fish online, **more** are buying the **bulk** of all of their frozen online than occurs with those buying fresh fish online.
- 46% of online frozen fish online buyers buy **all** or **most** of their frozen fish online.
- This seems reasonable in the light of the more robust nature of the product when compared with fresh/chilled fish.
- Consumers also **know** what the products are; more likely to be branded or supermarket own label, and processed e.g. battered, breaded or ready meal products ensuring a level of consistency in what they receive in their delivery.
- Therefore there is less risk of any issues or concerns regarding quality, freshness or portion size.

How often buy frozen fish online	Percentage how often buy frozen fish online (%)
All of it	20
Most of it	26
Around half	21
Only some	18
Not very much	13
Don't know	2

Base: All UK adults who buy frozen fish online (138).

Barriers to buying more fish online

- Reasons given for not buying all fish online were in line with expectations based on previous research.
- Wanting to be able to browse in-store, to see the product before buying, and wanting to ask for advice were all reasons given for consumers not buying all of their fish online.

Reasons do not buy all fish online	Percentage (%)
Can see what I'm buying	40
Convenient	34
Like to browse	31
Easier to buy in store	18
More special offers in store	12
Like to ask advice	5
Complicated to buy online	3

Base: All UK adults who do not buy all their fish online (159).



Factors that are important when buying fish

In this part of the study we explored a number of factors that could influence consumers’ choice, in order to establish for each **type** of fish (fresh, frozen and canned) which factors were the most and least important.

The factors assessed were:

- 1. Freshness/age of fish.
- 2. Good value for money.

We then asked respondents to **rank the importance** of the following when they were buying the three different types of fish (fresh, frozen and canned):

- a. Portion size.
- b. Freshness.
- c. Convenience.
- d. Coating/sauces.

1. Importance of freshness/ age of fish

Type of fish	Net: important (sum of Very important and Fairly important) (%)	Net: not important (sum of Not very important and Not at all important) (%)
Fresh/chilled	96	3
Frozen	67	28
Canned	50	41

Base: All UK adults who eat each of the types of fish.

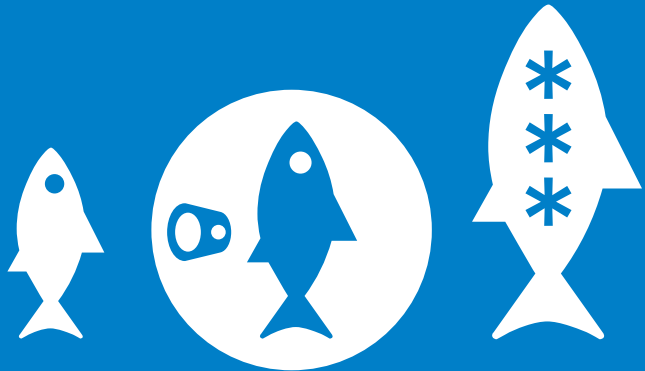
- From these results we can see that the freshness/age of the fish is of critical importance for fresh/chilled fish.
- Freshness is still reasonably important for frozen fish and less important for canned fish as would be expected.
- It is still worth noting **how** important freshness is for fresh fish at 96% overall (82% very important and 14% Fairly important).

2. Whether different types of fish are seen as good value for money

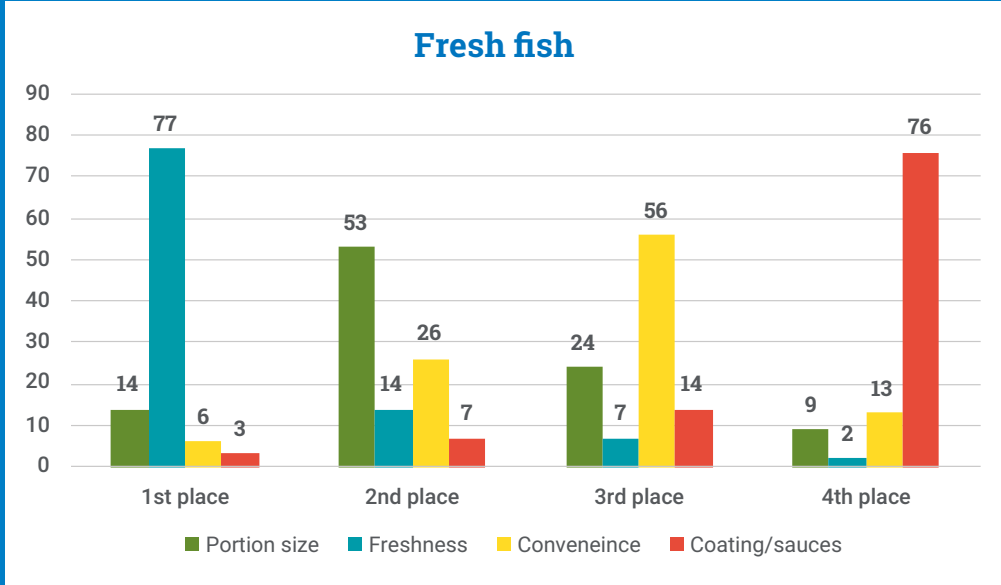
Type of fish	Net: Good value for money (sum of Very good value and Fairly good value) (%)	Net: not good value for money (sum of Not very good value and Not at all good value) (%)
Fresh/chilled	70	8
Frozen	84	3
Canned	77	5

Base: all UK adults who eat each type of fish.

- We can see here that fresh fish is regarded as less good value for money than frozen or canned fish.
- Frozen fish was considered the **best value for money** at 84%.
- Whilst canned fish was in the centre ground, perhaps the effect of tuna (a very popular canned fish) being relatively expensive to buy has to be taken into account here.



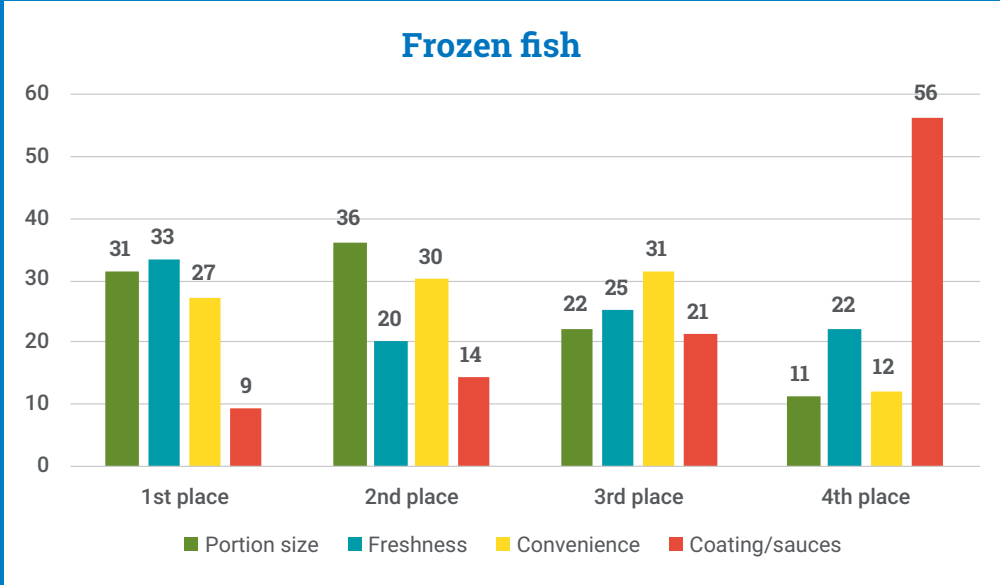
Fresh fish – relative importance of portion size, freshness, convenience and coating/sauces



BASE: All UK adults who eat fresh fish (1210).

- Again, perhaps unsurprisingly the most important aspect of fresh fish for consumers of the four is its freshness (77% put this in first place).
- Its second most important aspect is the portion size (i.e. how many people will a piece serve or how much does a portion weigh?).
- Convenience is third, followed by coating or sauce that comes with it as the lease important aspect.

Frozen fish – relative importance of portion size, freshness, convenience and coating/sauces

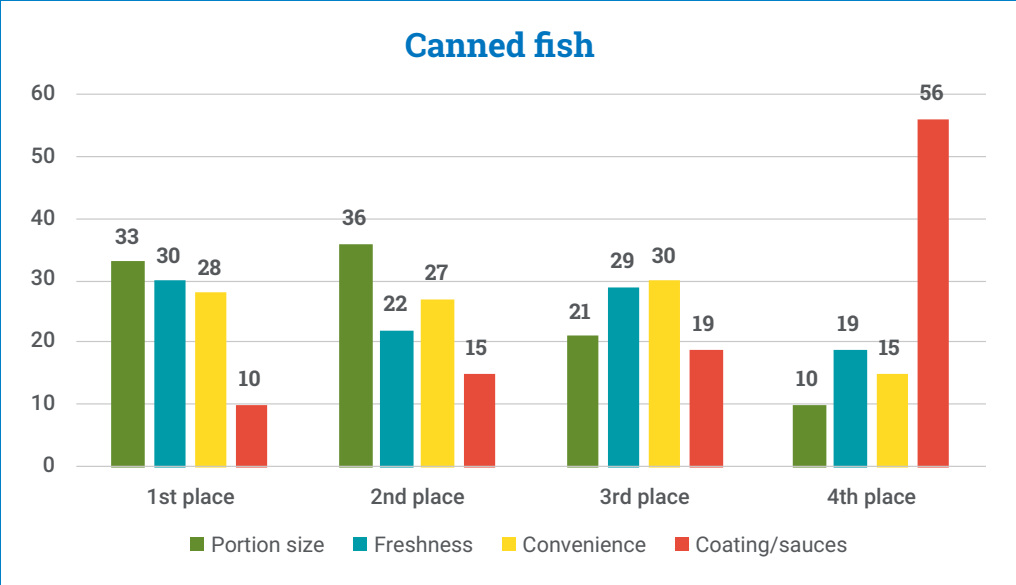


Base: All UK adults who eat frozen fish (1220).

- For frozen fish freshness is important but so too is the portion size and the convenience of cooking; all three are fairly close in terms of importance for consumers.
- The least importance is the coating or sauce that comes with frozen fish; a reasonable amount of frozen fish is sold as plain fillets without coating or sauce so this may account for the fourth placing of this aspect.

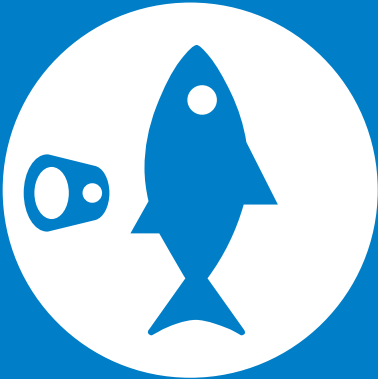


Canned fish – relative importance of portion size, freshness, convenience and coating/sauces



Base: All UK adults who eat canned/tinned fish (1081).

- With canned fish we can see a balanced distribution of the importance of the four attributes.
- The **least** important was coating/sauces as canned fish, probably as canned fish does not always have these.



What species of fish are the most popular?

- Our research shows that the **top five** are still dominated by the 'big five' species of cod, haddock, salmon, (tinned) tuna and prawns as perhaps would be expected.
- Cod is in first place being mentioned by 83% of respondents as a species of fish they always eat.
- Salmon and Haddock were a close second and third with mentions of 70% and 69% respectively.

Species of fish	Percentage ever eaten (%)
Cod	83
Salmon	70
Haddock	69
Tuna (tinned)	65
Prawns	59
Scampi	48
Mackerel	43
Plaice	40
Sea Bass	37
Tuna (fresh)	34
Sardines	32
Trout	31
Mussels	30
Crab	30

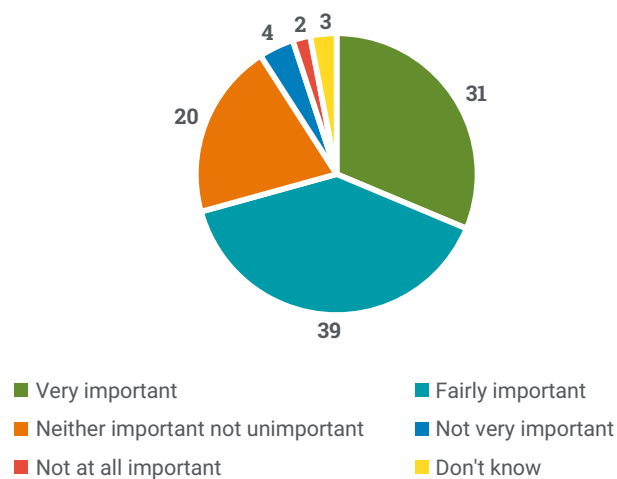
Base: All UK adults who eat fish (1855).

Species of fish	Percentage ever eaten (%)
Sole	29
Scallops	27
Kippers	26
Squid	25
Pollock	24
Lobster	19
Crab/fish sticks	18
Basa	18
Sea Bream	17
Langoustines	17
Halibut	14
Coley	12
Turbot	7

The importance of sustainability to consumers

In the research we explored how important the issue of sustainability was to consumers when they were buying fish either in store or online.

Importance of sustainability in choice of which fish to buy



Base: All UK adults who eat fish (1855).

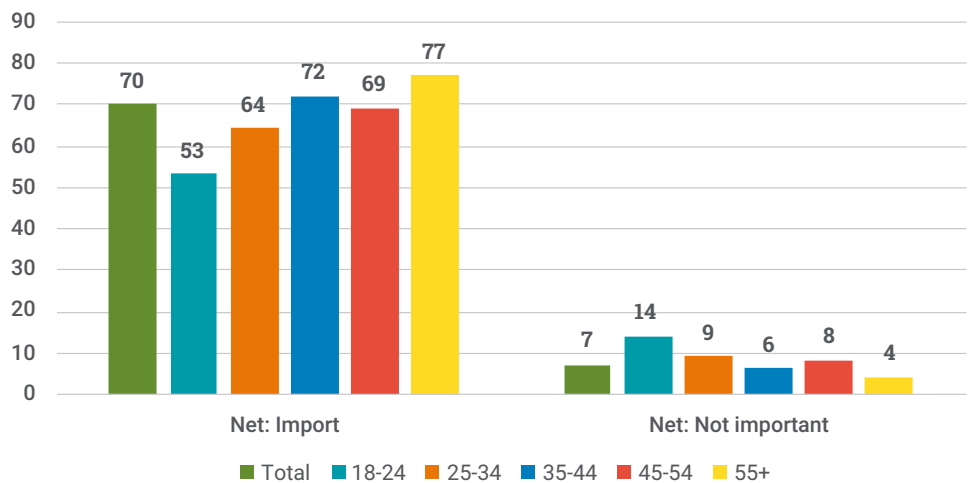
- As seen in the chart above, sustainability is clearly regarded as an issue for consumers with almost a third (31%) saying it is **very important**.
- This is followed by a further 39% saying it is **fairly important**.
- Thus in total we have found that **70%** of the UK fish-buying public think the sustainability of the fish they are buying is important to their choice of which fish to buy.

Importance of sustainability by age

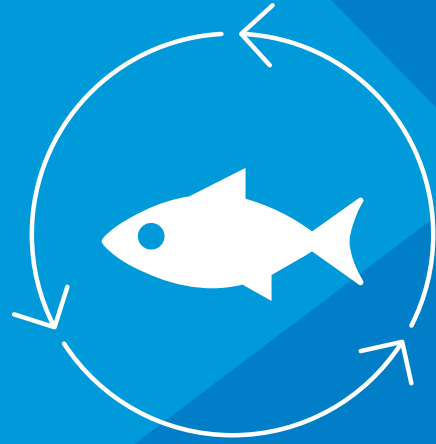
We noticed in the research that the importance of sustainability varied by age group.

Perhaps surprisingly the 18-24s were the **least** concerned by sustainability at 53%, and that the 55+ group was the **MOST** concerned (77%).

Importance of sustainability by age



Base: All UK adults who eat fish (1855).



Behaviour regarding sustainability

We explored the issue of sustainability further by asking which statements from a list consumers agreed with, relating to the retail environment and context when they were actually buying fish.

The purpose of this was to gain further insight as to how they **actually** behave at point of sale.

Our findings show that over a third (38%) feel it is the **retailer's** responsibility to sell sustainably sourced fish, and not the shopper's responsibility to seek it out.

It is worth highlighting that retailers need to be **pro-active** in promoting this aspect of their seafood product offering, as this is what consumers are now telling us they expect.

- 13% of consumers **only ever buy** sustainably-sourced fish and 23% make the effort to seek out sustainably-sourced fish for **some** of the species they buy but not all.
- In total this gives us over a third of consumers (36%) who are **actively** buying sustainably sourced fish.
- However 19% do not think about sustainability at all when buying fish.
- In terms of consumer knowledge, 18% admit they don't know what to look for on packets and 9% don't understand enough to know what to look for.

Statements agree with re sustainability:

- | | |
|--|--|
| • "I think it is the responsibility of the people to sell the fish to ensure it is sustainably sourced" - 38% . | • "I do not understand what sustainably sourced fish is enough to look for it" - 9% . |
| • "I seek out sustainably sourced fish for certain fish, but not for all the fish I buy" - 23% . | • "I do not think it matters to world fish stocks whether you buy sustainably sourced fish or not" - 2% . |
| • "I do not think about the sustainability of the fish at all when I am buying fish" - 19% . | • None of these - 5% . |
| • "I do not know what to look for on packs when it comes to sustainably-sourced fish" - 18% . | • Don't know/can't recall - 7% . |
| • "I actively seek out sustainably sourced fish and would only ever buy sustainable fish" - 13% . | |

Base: All UK adults who eat fish (1646).

What aspects of sustainability are of most concern?

We asked all of our respondents (whether they ate fish or not) to say which aspects of sustainability were of most concern to them from the list below. They were allowed to select all that did apply.

Aspects most concerned about:

- | | |
|--|---|
| • Overfishing of certain species leading to them being endangered: 70% . | • The amount of fish in the sea: 39% . |
| • Impact on fish from plastic pollution: 67% . | • None of these: 6% . |
| • Responsibility of fishing industry in respect of fishing practices: 51% . | • Don't know: 7% . |

Base: All UK adults (2047).

Awareness of the recommended number of portions of fish to eat in a week

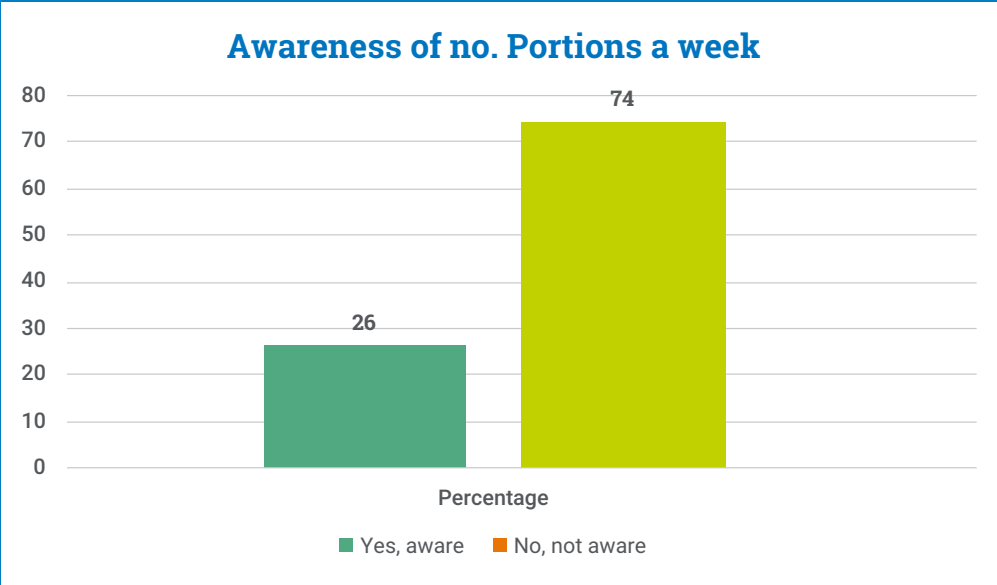
As Seafish we monitor awareness of the government health advice to "eat two portions of fish a week, one of which should be oily" on a regular basis.

Here we asked the **question on a number of levels** in line with previous measures as follows:

1. Whether consumers were aware of the number of portions of fish people should eat in a week.
2. From a multi-choice list which do they think comes closest to the recommended number of portions.
3. Whether the respondents had heard of the actual number of portions (two).
4. Awareness of which species of fish are classified as oily for the purposes of omega-3 content.

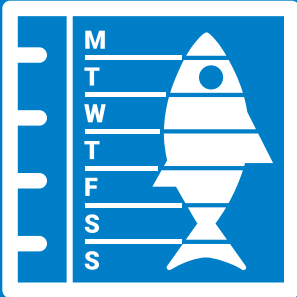
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1. Whether aware of the recommended number of portions of fish people should eat in a week



Base: All UK adults (2047).

- This figure of 26% awareness of the recommended number of portions is in line with previous measures.
- The figure is higher amongst women (31%).



2. Whether know the number of portions recommended

We gave all respondents a list of the possible numbers of portions per week that could be the recommended number and asked them to select which one, if any, they thought came closest to the correct figure.

- Encouragingly, 42% were correct in identifying **two** portions, the most popular choice from the list of possible portions per week.

Number of recommended portions a week	Percentage selected this number (%)
One portion	11
Two portions	42
Three portions	28
Four portions	5
Five portions	2
Six portions	0
Seven portions	0
More than seven portions	0
Don't know	13

Base: All UK adults (2047).

3. Awareness of actual recommendation that “a healthy diet should include two portions of fish a week, of which one should be oily”

We put it to respondents that this was the recommendation of the NHS and healthcare professionals and asked if they had heard of this recommendation.

- Only 32% had heard of this recommendation (nearly one third).

- The 32% awareness figure was higher amongst women at 39% and amongst those aged in the 55+ year group at 37%.
- 68% had not heard of the recommendation.

Base: All UK adults (2047).

4. Prompted awareness of which fish are oily

From a list of 27 species of fish respondents were asked to say which they thought were classified as oily.

There were a handful that came out strongly as being identified as oily fish:

- Mackerel 67%.
- Sardines 64%.
- Salmon 43%.
- Kippers 38%.
- Fresh tuna 29%.
- Tinned tuna 28%.
- Trout 20%.

Followed by (species thought to be classified as oily):

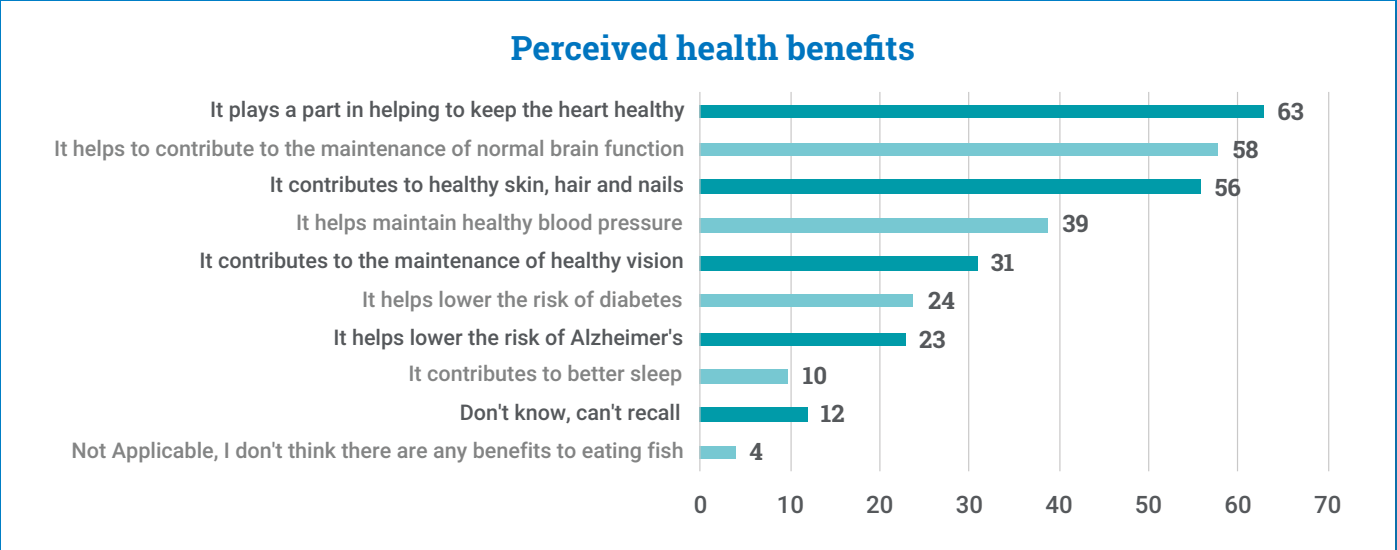
- Sea bass 6%.
- Cod 6%.
- Halibut 6%.
- Haddock 5%.
- Sea bream 4%.
- Squid 3%.

- Mussels 3%.
- Plaice 3%.
- Sole 2%.
- Pollock 2%.
- Turbot 2%.
- Scallops 2%.
- Basa 1%.
- Crab 1%.
- Prawns 1%.
- Scampi 1%.
- Coley 1%.
- Langoustines 1%.
- Lobster 1%.
- Crab sticks 1%.
- Don't know/can't recall 13%.

(Base: All UK adults (2047)).

The perceived health benefits of fish

- We know that consumers are aware that **fish is good for you** and most are able to cite certain attributes about its health benefits for example, good for the brain or heart.
- In this part of the research we gave respondents a list of possible benefits and asked them to say which, if any, they thought were the health benefits of eating fish.
- Heart, brain and skin/nail/hair health all featured strongly in their responses regarding the perceived health benefits of eating fish (fig.38 below).



Base: All UK adults (2047).

Whether being aware of the health benefits encourages consumers to eat more fish

It is fine to tell consumers the health benefits of eating fish as stated by medical professionals, but is this likely to have an impact on and affect their behaviors?

In the qualitative work we have conducted in this section we find that people **do claim** that they would eat more fish if they were told of the specific health benefits.

Over 70% say that they agreed that they are encouraged to eat more fish after hearing of these specific health benefits, with only 21% disagreeing.

	Whether agree encouraged to eat more fish having heard the health benefits (%)
Strongly agree	18
Tend to agree	53
Tend to disagree	13
Strongly disagree	8
Don't know	8

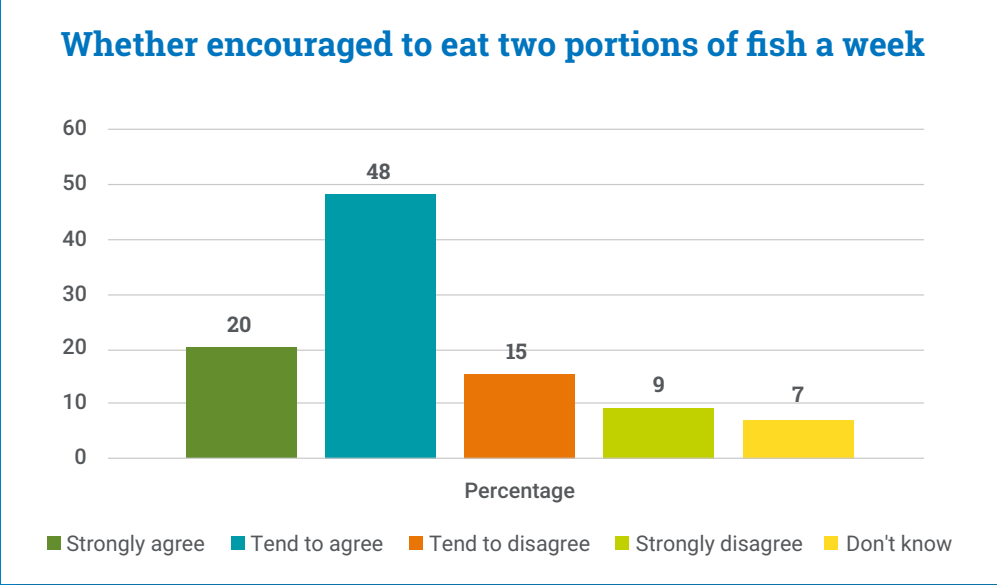
Base: All UK adults.

Whether specifically encouraged to eat two or more portions of fish a week

However will consumers agree that they're encouraged to eat not just 'more' but to eat two or more portions a week?

This shows us the power of not only specifying the health benefits, but of also **specifying** how much fish is needed to make an in-road to benefit from these attributes of fish.

Encouragingly, the graph below shows us that two thirds of them do agree.



Base: All UK adults (2047).



Portion size versus price

We asked whether given that the recommended portion size for the NHS '2 a week' advice was two 140g servings of fish per week, it would be preferable to have **all** portions of fish sold in the chiller or freezer cabinet set at 140g.

This would mean that each purchase might cost more (currently portions can vary e.g. 110g or 130g) but this would mean the consumer would know that they were buying a proper portion size each time, allowing them to plan diets, meals, shopping and budgets accordingly.

- The majority (55%) would prefer to pay more knowing that each portion matched the recommended amount.
- 24% would prefer to pay less even though they would not get a recommended portion size.
- 21% said they don't know.

Base: All UK adults (2047).

The figure for those would prefer to pay more was also higher amongst the 55+ age group (60%) and those who were retired (61%) indicating a greater desire for this demographic to ensure good nutrition to potentially guard against the health issues that old age can bring.



Omega-3

We included three questions in the research about omega-3:

1. Whether consumers were aware that oily fish contained omega-3 which is associated with various health benefits.
2. Whether consumers were aware that some non-oily white fish contain omega-3 but in lower concentrations than oily fish.
3. Whether they had noticed and what they thought about the fact that some non-oily white fish brands are marketed as having omega-3 in them, albeit that the omega-3 is in lower concentrations than found in oily fish.

1. Omega-3 awareness oily fish

- Am aware oily fish contains omega-3: 94%.
- Am not aware oily fish contains omega-3: 6%.

Base: All UK adults.

- From our results we can see that the vast majority of UK adults sampled are aware of the omega-3 in oily fish and its health benefits.

2. Omega-3 awareness non-oily white fish

- Am aware re non-oily white fish and omega-3: 50%.
- Am not aware of non-oily white fish and omega-3: 50%.

Base: All UK adults

- However only half are aware that some non-oily white fish contain omega-3 but in lower concentrations than oily fish.

3. Whether non-oily fish marketed with omega-3 was noticed and affected behavior

- A third of consumers (33%) had not noticed that some non-oily white fish products promote the fact that they contain omega-3.
- Encouragingly almost a quarter (22%) had noticed such marketing and it had **encouraged them to buy**.
- 14% had noticed but regarded it as a marketing method.
- 20% said none of these.
- 11% said don't know.

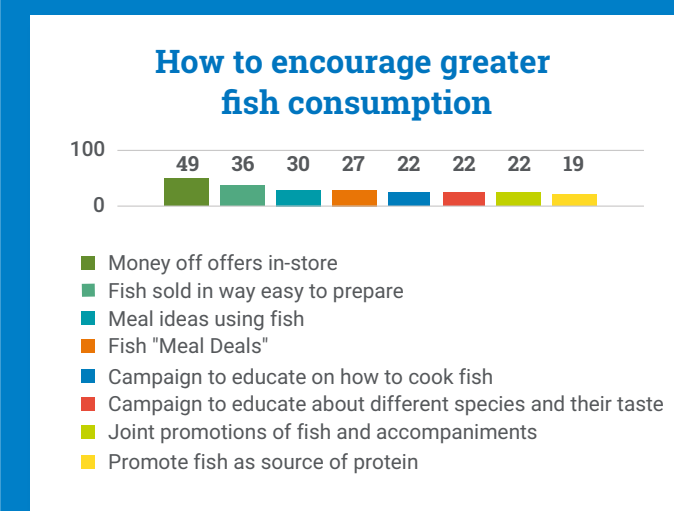
(Base: All UK adults who eat fish, who are aware that some non-oily white fish contain omega-33 (1021)).

How do we encourage consumers to eat more fish?

Over the years, in many studies and pieces of consumer research, we have explored how we might encourage the UK population to eat more fish.

We know that some of the population do not and will not eat fish, so we have concentrated on those who say they eat **some** fish, to encourage them to increase their consumption by adding a few extra meals containing fish into their weekly diet.

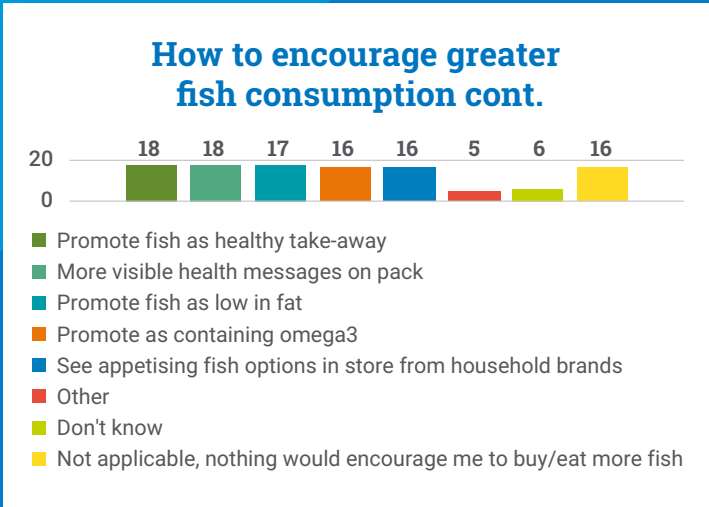
In this section we have developed a list of possible incentives or means to encourage greater consumption and have **quantified** consumer responses to these for the **first** time.



Base: All UK adults.

How do we encourage consumers to eat more fish?

- Money-off offers came out on top here as the greatest incentive; we know that people can view fish as expensive.
- If there were more offers to entice people to try species of fish or new fish products this would clearly be appealing to consumers.
- Meal Deals were also a popular answer; prevalent in-store but but never done as **fish** based previously.



Base: All UK adults (2047).

Protein types – which are becoming more/less popular?

Here we look at gaining further insight into which protein/food groups are growing in popularity and which are in decline with consumers.

We know that people claim to be eating less red meat, more white meat, more fish, less dairy and more plant-based foods.

For this part of the research we wanted to gather solid research and evidence to back up these claims. For each group of consumers we asked whether they were eating more, less or the same as this time last year of the following food groups:

- Beef.
- Poultry.
- Dairy.
- Eggs.
- Fish.
- Lamb.
- Nuts and Seeds.
- Pork.
- Vegetarian foods (e.g. beans and other pulses, Quorn, soya etc.).
- Tofu.
- Dairy-free alternatives to milk (e.g. soya, almond milk etc.).

Beef consumption compared to this time last year:

Protein	Eating more (%)	Eating the same amount (%)	Eating less (%)	Not applicable – I have never eaten beef (%)
Beef	6	56	29	10

Base: All UK adults (2047)

- There has been a **significant** reduction in beef consumption with a net loss of 23%.
- Almost a third of the UK adult population (29%) has reduced their consumption of beef in the past year.
- The incidence of reduction is highest amongst the 55+ age group (36%), the retired (35%), those separated or divorced (38%) and widowed (37%).
- It is also higher for the heavier fish-eaters surveyed (c. 38%) who eat two or more portions a week.

Reasons for eating less beef

- A quarter (25%) of those eating less beef are eating less because of the expense.
- 17% are simply trying to eat less red meat.
- 17% specifically mention "health concerns".
- 9% do not enjoy beef.
- 4% are eating more chicken/white meat.
- 4% because of fat.
- 4% more veg/vegan.
- 3% eating more fish.
- 3% family eats less/do not like beef.
- 3% change in circumstances.
- 3% sustainability/environmental issues.
- 2% animal welfare.
- 2% hard to digest.

(Base: All UK adults eating less beef (586)).

Poultry consumption compared to this time last year

Protein	Eating more (%)	Eating about the same (%)	Eating less (%)	Not applicable – I have never eaten poultry (%)
Poultry	18	66	10	7

Base: All UK adults (2047).

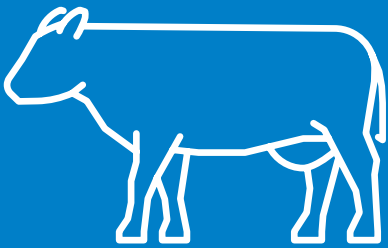
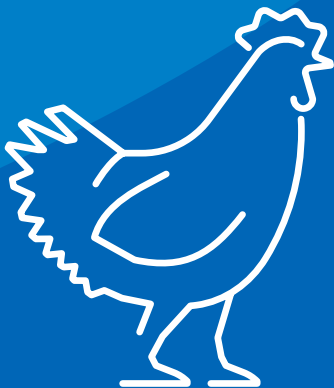
- 18% of UK adults are eating **more** poultry than this time last year.
- However 10% are eating less, giving this protein a **net gain** of 8%.

Reasons for eating more poultry

- Two main reasons dominate the responses for eating **more** poultry: price (24%) and health (20%).
- 11% say they enjoy it.
- 10% say it's versatile.
- 7% say it's good protein.
- 7% are eating less red meat.
- 7% because it's low in fat.
- 4% prefer white meat.
- 4% say it's easy to cook.
- 3% say everyone enjoys it.
- 3% because they are cooking more.
- 3% due to availability.
- 2% say easier to digest.
- 2% because it's leaner.
- 2% say more variety.

Base: All UK adults eating more poultry (368).

Chicken is without a doubt regarded as a cheap protein to buy by the consumer. It's also versatile, a crowd-pleaser and easy to cook. In addition it has the health benefits of white meat.



Dairy consumption compared to this time last year

Protein	Eating more (%)	Eating the same amount (%)	Eating less (%)	Not applicable – I have never eaten poultry (%)
Dairy	10	72	16	2

Base: All UK adults (2047).

- Here we see that 16% of UK adults are eating **less** dairy products than this time last year.
- With only 10% eating more that's a **net loss** of 6%.

Reasons for eating less dairy

- Our consumers' reasons for eating **less dairy** related to concerns about the perceived un-healthiness of these products.
- 16% said it was unhealthy.
- 12% said high in fat/eating less fat.
- 12% said animal welfare/farm/production/ethical issues.
- 11% were eating less as on a diet.
- 10% said it was due to allergy/intolerance.
- 5% said vegan in family/gone/going vegan.
- 5% said cholesterol.
- 4% gave price as a reason.
- 4% was due to GP/medical advice.
- 3% do not like the taste.
- 3% were trying to cut down.
- 2% said no/less milk.
- 2% said no/less cheese.

(Base: All UK adults eating less dairy (331)).



Egg consumption compared to this time last year



Protein	Eating more (%)	Eating about the same (%)	Eating less (%)	Not applicable – I have never eaten eggs (%)
Eggs	19	64	12	4

Base: All UK adults (2047)

- When it comes to eggs 19% of UK adults are eating **more** eggs than this time last year.
- 12% are eating less, so a **net gain** of 7% for this protein.

Reasons for eating more eggs

- Consumers see eggs as a valuable source of protein (19%).
 - On a similar theme, 14% regard them as nutritious and healthy.
 - 11% say they like them.
 - 10% say they are easy to prepare/cook.
 - 10% say cheap/good value.
 - 10% say they are versatile.
 - 8% are eating more for breakfast.
- 7% as on a diet or for weight loss.
 - 5% as eating less meat.
 - 5% because eggs fill them up.
 - 4% because baking/cooking more.
 - 4% have hens or friends with hens.
 - 2% say they're convenient.
 - 2% changed eating habits/diet.
 - 2% change in circumstances.

Base: All UK adults eating more eggs (396).

Fish consumption compared to this time last year



Protein	Eating more (%)	Eating the same amount (%)	Eating less (%)	Not applicable – I have never eaten fish (%)
Fish	19	67	7	8

Base: All UK adults (2047).

- It is encouraging to see that 19% of UK adults are eating **more** fish than this time last year.
- Whilst 7% are eating less, we can still see a **net gain** of 12% more people eating fish.

Reasons for eating more fish

- An outstanding number of respondents who were eating more fish were doing it because it was healthier for them (39%).
- Reassuringly, a quarter (25%) mentioned that they enjoyed the taste of fish and that was one of the reasons they were eating more of it.
- Interestingly, 9% said they were eating more fish because they were eating or trying to eat less meat.
- 4% said easy to cook.
- 4% to improve diet.
- 3% because of more variety available.
- 3% said more recipes.
- 2% said family like fish.
- 3% it was a better/healthier protein.
- 3% to have a varied/balanced diet.
- 2% said it was quick to cook.
- 2% said it was low in fat.
- 2% said omega-3 was a reason.
- 2% said due to a change in circumstances.

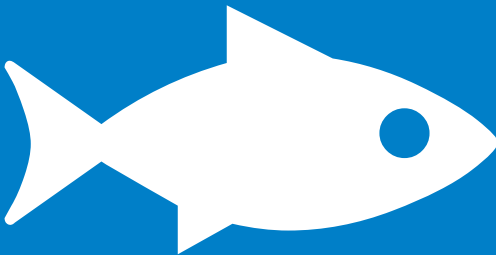
Base: All UK adults eating more fish (380).

Taste and **health** again stand out as reasons for eating (more fish) for consumers.

Reasons for eating less fish

- For those eating less fish, the main reason (18%) was the price.
- This was followed by 12% who said that they had simply "gone off" or "do not like" fish.
- 11% mentioned a "change in circumstances" which tended to mean a divorce, separation or death.
- 5% gone vegan/veggie.
- 4% due to sustainability issues.
- 3% intolerance/allergy.
- 3% due to farmed fish/animal welfare issues.
- 2% were making an effort to eat less fish.
- 2% because partner does not like fish.
- 2% stopped being pescatarian.

Base: All UK adults eating less fish (146).



Lamb consumption compared to this time last year

Protein	Eating more (%)	Eating the same amount (%)	Eating less (%)	Not applicable – I have never eaten lamb (%)
Lamb	5	49	28	19

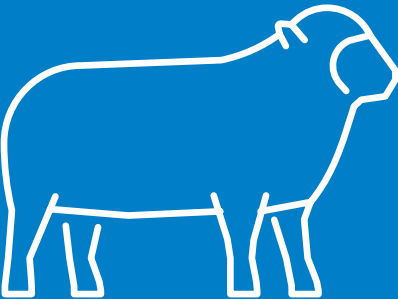
Base: All UK adults (2047)

- Here we see a staggering 28% of UK adults claim they are eating less lamb than a year ago.
- Only 5% claimed to be eating more, a **net loss** of 23%.
- This figure is higher amongst the 55+ age group (33%) and those who are retired (up to 34%).

Reasons for eating less lamb

- The **price** of lamb now was by far the main reason given for eating less of it (39%), rather than for health or taste reasons.
- This was followed by mentions of generally trying to eat less red meat (11%), having gone off it (10%) and finding lamb too fatty and greasy (10%).
- Sustainability and welfare/ethical issues was only mentioned by 6%.
- 'Health reasons' was only given as a reason by 5% of the respondents.
- 4% said vegetarian/vegan.
- 3% said no reason.
- 3% said they were the only one in their family who liked lamb.
- 2% said partner/family does not like lamb.
- 2% due to a change in circumstances.
- 2% said they preferred fish.

Base: All UK adults eating less lamb (577).



Pork consumption compared to this time last year

Protein	Eating more (%)	Eating the same amount (%)	Eating less (%)	Not applicable – I have never eaten pork (%)
Pork	6	53	28	13

Base: All UK adults (2047).

- Following the reduction shown previously in beef and lamb consumption, pork follows that trend in this study with over a quarter (28%) of the UK population eating **less** pork now than a year ago.
- Only 6% are eating more equating to a **net loss** of 22%.

Reasons for eating less pork

- Reasons given here for eating less pork are varied in comparison with other proteins.
- 17% simply claim to have “gone off” pork, 11% are eating less meat and price is also a factor (8%).**
- 8% for health reasons/unhealthy.
- 7% say it's fatty/fattening.
- 6% because veggie/vegan.
- 4% eat more chicken or prefer chicken.
- 4% said no reason.
- 4% said it was tasteless/bland.
- 4% said eating less bacon/sausages/ham/processed foods.
- 3% because family do not like.
- 3% said animal welfare.
- 2% eating less pork.
- 2% prefer other meats.
- 2% due to a change in circumstances.
- 2% prefer fish.
- 2% cannot cook/not easy to cook or not confident cooking pork.
- 2% environmental/farming issues.

Base: All UK adults eating less pork (576).

Nut and seed consumption compared to this time last year

Protein	Eating more (%)	Eating the same amount (%)	Eating less (%)	Not applicable – have never eaten nuts and seeds (%)
Nuts and seeds	20	53	14	13

Base: All UK adults (2047).

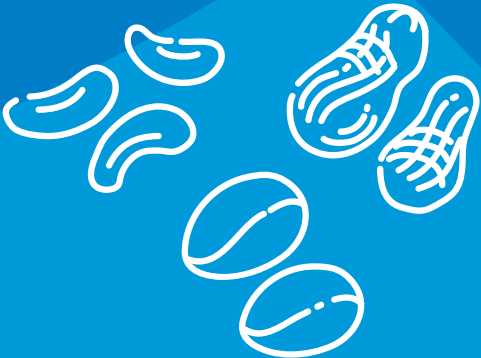
- 20% of the population are eating **more** nuts and seeds than this time last year.
- 14% are eating less, a **net gain** of 6%.
- Amongst those eating more, this behavior is more prevalent in the **18-24s age group** (26%) and **full-time students** (29%).

Reasons for eating more nuts and seeds

- Almost a third at 31% are eating more nuts and seeds because they are “**Healthy or good for you**” – the health factor prevails here.
- The next most popular reason for eating more is that they enjoy them and find them tasty (14%).
- 8% eating more instead of sweets/chocolates/crisps.
- 8% as a healthy snack.
- 6% as good/healthy protein.
- 3% say convenience.
- 3% because of availability/snack packs.
- 3% say give variety to diet.
- 2% are doing more cooking/backing with nuts/seeds.
- 2% because are cheaper now or cite Lidl as a reason.
- 2% eat instead of (red) meat.

Base: All UK adults eating more nuts and seeds (413).

It may be that the greater availability of nuts and seeds in small snacking packs (e.g. at supermarket checkouts and ordering online) has helped this growth. This has helped make them more accessible and a healthy alternative to confectionery on the go.



Vegetarian food (beans, pulses, Quorn, soya etc) consumption compared to this time last year

Protein	Eating more (%)	Eating the same amount (%)	Eating less (%)	Not applicable – have never eaten vegetarian foods (%)
Vegetarian food (beans, pulses, Quorn, soya etc)	19	42	8	31

Base: All UK adults (2047)

- 19% of UK adults say they are eating **more** ‘vegetarian foods’ than this time last year.
- With 8% eating less then last year we have a **net gain** of 11%.
- This increase is highest amongst the **18-24 year old** age group (28%) and **students** (29%).
- It is most likely this increase is allied to the current growth in vegetarianism and veganism.

Reasons for eating more vegetarian foods

- The main reason (29%) for the increase in eating vegetarian food was that it was regarded as “**healthy or healthier**”.
- 17% were vegetarian or vegan or had family or friends who were which affected their own dietary behaviours.
- Whilst not fully vegetarian 11% were eating less red meat and so consuming more vegetarian foods instead.
- 8% said they were cheap or cheaper.
- 8% because they were tasty/enjoyed them.
- 6% for more variety in diet.
- 4% because of sustainability.
- 3% due to animal welfare.
- 3% as easy to cook.
- 3% as high in protein.
- 3% as on a diet.
- 2% because they were filling/for bulk.
- 2% because of more recipes.
- 2% because of change in diet.
- 2% because better variety in shops.

Base: All UK adults eating more vegetarian foods (383).

Tofu consumption compared to this time last year

Protein	Eating more (%)	Eating the same amount (%)	Eating less (%)	Not applicable – have never eaten tofu (%)
Tofu	5	16	5	74

Base: All UK adults (2047).

- Three quarters of the UK population do not and never have eaten tofu.
- 16% were eating the same amount as they had last year, showing **no net increase** despite the rise of vegan and vegetarian diets.
- With equal quantities of consumers eating more and less there was **no gain or loss** of consumption for this protein.



Dairy-free alternatives to milk (e.g. soya, almond milk) consumption compared to this time last year

	Drinking more (%)	Drinking the same amount (%)	Drinking less (%)	Not applicable – have never drunk (%)
Dairy-free alternatives to milk	10	25	7	58

Base: All UK adults (2047).

- The research shows that 10% of UK adults were drinking **more** almond or soya milk than this time last year.
- However 7% were drinking less leading to a small **net gain** of 3%.

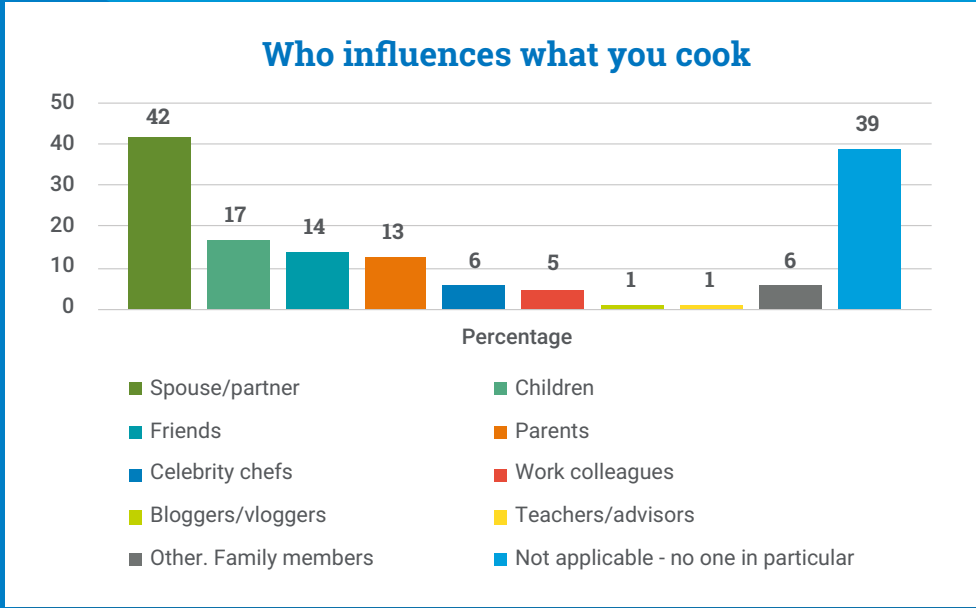
Reasons for drinking more dairy-free alternatives to milk

- 19% of those drinking more dairy-free alternatives to milk said that one of the reasons they were drinking more was that it was “**better for you**”; health benefits are the most popular reason given here.
- Interestingly, 15% were drinking more because of an allergy to dairy or lactose or had IBS which was aggravated by lactose.
- 12% had gone vegetarian or vegan and were therefore drinking these products as an alternative.
- 9% said they liked it/it suited them/they enjoyed it.
- 7% because of animal welfare issues.
- 7% liked almond milk.
- 6% because it was an alternative to dairy.
- 5% due to availability.
- 4% had given or were giving up dairy.
- 4% for variety in diet.
- 4% for environmental issues.
- 3% said because it was low in fat.
- 3% said because anti-dairy industry.
- 2% due to changed eating habits.

Base: All UK adults drinking more dairy-free alternatives to milk (203).

Who or what influences consumers' choice of what to cook?

Here we explored **who** influenced consumers in their choice of what to cook.



Base: All UK adults (2047)

- The biggest influence on consumers here was their **spouse or partner** at 42%.
- This will be related to accommodating a spouse or partner's preferences, as well as perhaps wanting to try new dishes together as well as old favourites.

Influences on food cooked:

- When it comes to what influences consumers, almost half (47%) say **nothing in particular** influences their choice of what to cook.
 - Amongst those who **are** influenced the most significant influence is eating food from different cuisines in restaurants (29%), followed by the experience of eating different foods whilst travelling or on holiday (26%).
 - 20% said TV.
 - 17% said websites.
 - 12% said magazines.
 - 11% said social media.
 - 5% said newspapers.
 - 3% said apps.
- Base: All UK adults (2047).

Following diets

We know from other research and the current general nutrition climate in the UK that diets of all kinds are popular with consumers.

So, which diets or dietary regimes are the most popular at this point in time in the UK?

Diet	Percentage currently following (%)
Low calorie	10
Vegetarian	6
Low carb	6
Clean eating	5
Flexitarian	5
Pescatarian	4
Membership programme (e.g. Slimming World, Weight Watchers)	4
Vegan	2
Paleo	1

Base: All UK adults (2047).

- We can see from the above that the most popular diet is the perennial favourite, the low calorie diet with 10% of the UK population currently following this.
- The next most popular (for weight control) is the low carb diet with 6%.
- 6% of the UK population is currently vegetarian and 5% would describe themselves as following a flexitarian diet (mostly vegetarian with occasional meat and fish).
- 4% are pescatarian and 4% are members of a weight loss club such as Slimming World or Weight Watchers.
- Only 2% are vegan.
- 1% are on a paleo diet.
- Assuming these diets are all mutually exclusive that means a huge 43% of the UK population are on a diet or dietary regime of some sort or other.
- This leaves 57% on a NORMAL, eat whatever you want diet.

We look next at consumers' experience of following each specific diet and their reasons for stopping these.

Diet	Currently following (%)	Tried in past (%)	Heard of but never tried (%)	Never heard of (%)
Low calorie diets	10	30	54	6
Low carb diets	6	17	69	8
Vegetarian diets	6	14	73	7
Flexitarian diet	5	4	36	55
Clean-eating diet	5	6	54	35
Pescatarian	4	5	61	30
Membership programmes	4	16	76	4
Vegan diet	2	4	86	8
Paleo diet	1	3	44	52

Base: All UK adults (2047).

Reasons stopped following a specific diet

Where respondents had tried a specific diet but subsequently stopped, we asked them to give us their reasons for stopping.

This is useful in understanding the limitations or constraints of certain diets and consumer tolerance of the restrictions versus the benefits derived from following the diet.

Reasons stopped vegetarian diet

- Almost a third (29%) of those who had tried a vegetarian diet had stopped because they missed their previous eating habits; they missed the meat they were used to eating.
- A quarter (25%) simply “got bored of following the diet”.
- A fifth (21%) found it “too limiting, I couldn’t eat many things”.
- And 17% simply “ran out of ideas”.
- 12% felt isolated.
- 11% said it was too time-consuming to prepare and cook meals.
- 11% said it was too expensive.
- 9% said too time-consuming to follow.
- 4% said it was too difficult to get ingredients.
- 11% not applicable – no particular reason.

Base: All UK adults who have stopped a vegetarian diet (295).

These finding reflect the fact that changing from a regular diet to one that removes a major part such as meat and fish takes effort and many consumers find this too much for them.

Respondents tended to cite missing their previous eating habits, getting bored of following the diet, finding it too limiting, being too expensive or running out of ideas of what to eat.

Here we give the responses for each of the diets:



Reasons stopped vegan diet

- Similar reasons were given for stopping a vegan diet as for stopping a vegetarian one.
- 30% said it was too limiting.
- 27% missed previous eating habits.
- Interestingly twice as many (21%) claimed a vegan diet was “too expensive to follow” compared to the 11% who said the same of a vegetarian diet.
- 21% found it too time-consuming to follow and 19% said it took too much time to prepare and cook a vegan diet compared to a regular diet.
- 18% got bored.
- 18% ran out of ideas.
- 17% found it difficult to get ingredients.
- 16% felt isolated.
- 14% said it had a negative impact on health.
- 11% not applicable – no particular reason.

Base: All UK adults who have stopped a vegan diet (80).

Reasons stopped a pescatarian diet

- Missing previous eating habits was the main reason for giving up on a pescatarian diet at 20%.
- 16% found it too expensive and the same number found that they just got bored of following it.
- 13% said they ran out of ideas.
- 11% said it was too limiting.
- 11% felt isolated.
- 9% said it had a negative impact on health.
- 7% said it was too difficult to get ingredients.
- 4% said too time-consuming to follow.
- 4% said too time-consuming to prepare and cook meals.
- 12% not applicable – no particular reason.

Base: All UK adults who have stopped a vegan diet (80).

Again, a similar set of reasons to previous diets we have looked at in this study.

Reasons stopped clean eating diet

- Almost a third (31%) of those who had tried the clean eating diet had stopped because it was too expensive.
- Buying un-processed, natural foods is more expensive than the processed foods we are often used to.
- 27% found it too limiting and 27% mentioned that they “got bored” on this diet.
- A quarter (25%) “missed their previous diet”.
- 21% said it was too time-consuming to prepare and cook meals.

Reasons stopped flexitarian diet

- With a flexitarian diet the main reason for stopping, given by 27%, was just “getting bored of following the diet”.
- 21% missed their previous eating habits, assuming they meant they missed meat in their diet.
- 20% just ran out of ideas.
- 14% said it was too time-consuming to prepare and cook meals.
- 14% said it was too limiting.
- 12% said it was too expensive.
- 10% said it was too time-consuming to follow.
- 8% felt isolated.
- 8% said it had a negative impact on health.
- 6% said it was too difficult to get ingredients.
- 13% not applicable – no particular reason.

Base: All UK adults who have stopped a flexitarian diet (82).

Base: All UK adults who have stopped a clean eating diet (124).

Reasons stopped paleo diet

- A quarter (26%) of those who had tried a paleo diet stopped because they “got bored”.
- Again, as with other diets, some find them too limiting and so stop and return to their previous eating habits; in this case 23% said this of the paleo diet.
- They also take application and effort to follow and here 19% said the paleo diet was too time-consuming to follow and so they stopped.
- 18% said it was too expensive.
- 15% said they missed previous eating habits.
- 15% said it had a negative impact on health.
- 14% said it was too time-consuming to prepare and cook meals.
- 12% ran out of ideas.
- 7% said it was too difficult to get ingredients.
- 7% felt isolated.
- 11% not applicable – no particular reason.

Base: All UK adults who have stopped a paleo diet (60).

Reasons stopped low carb diet

- The low carb diet had the highest boredom factor amongst respondents, with 40% stopping because they got bored.
- 28% found it “too limiting” and 25% “missed their previous eating habits”.
- 15% ran out of ideas.
- 14% said it had a negative impact on health.
- 13% said it was too expensive.
- 10% said it was too time-consuming to prepare and cook meals.
- 8% said it was too time-consuming to follow.
- 6% felt isolated.
- 3% said it was too difficult to get ingredients.
- 14% not applicable – no particular reason.

Base all UK adults who have stopped a low carb diet (366).

Removing or reducing carbohydrates is a very difficult regime to follow and the absence of bread, pasta, cereal etc. can be hard to adhere to.

Reasons for stopping membership programme

- With membership diet programmes the biggest reason for stopping was the price (40%).
- With weekly payments and costs for online apps this is clearly a factor for some (indeed, amongst C2DE social classes this figure rose to 44%).
- 29% simply “got bored” of following the programme.
- 15% found it too time-consuming to prepare and cook meals.
- 15% found it too time-consuming to follow.
- 12% said it was too limiting.
- 11% missed their previous eating habits.
- 8% ran out of ideas.
- 5% felt isolated.
- 4% said it had a negative impact on health.
- 3% said it was difficult to get ingredients.
- 19% not applicable – no particular reason why.

Base: All UK adults who have stopped a membership diet programme (302).

Reasons stopped low calorie diet

- With low calorie diets we found 36% stopped because they were getting bored with the diet.
- A quarter “missed their previous eating habits” and 23% found the diet too limiting.
- 11% said it was too time-consuming to follow.
- 11% ran out of ideas.
- 10% said it was too time-consuming to prepare and cook meals.
- 7% felt isolated.
- 7% said it was too expensive.
- 6% said it had a negative impact on health.
- 2% said it was too difficult to get ingredients.
- 16% not applicable – no particular reason.

Base: All UK adults who have stopped a low calorie diet (627).

We looked at those who gave “other” answers than the ones provided and quite a number of these mentioned that they had reached their target weight and that this is why they had stopped.

How can we encourage the consumer to buy more fish when they are out and about?

Here the research looks at how we can potentially encourage the consumer to buy more fish when they are out and about.

We asked the following question of all UK adults:

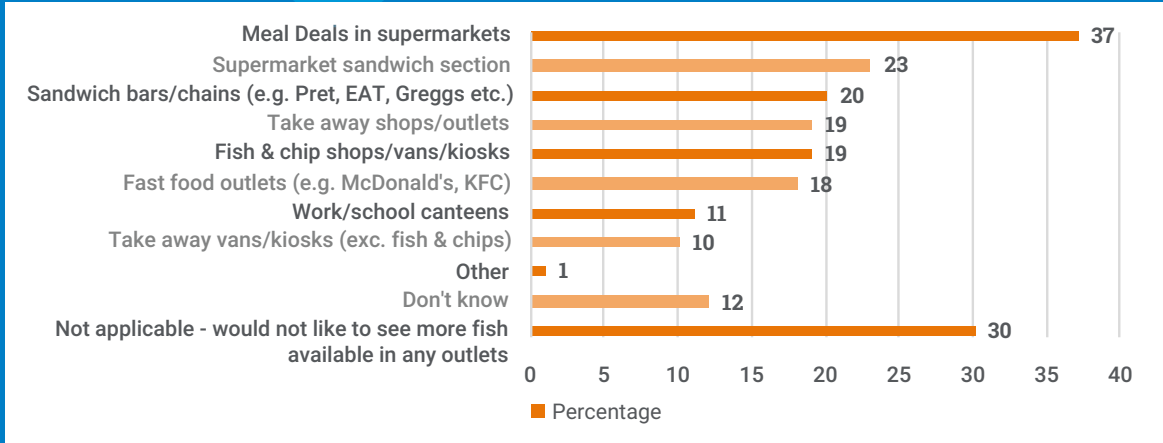
Thinking about when you buy food to eat when you are out (e.g. at work, out for leisure etc.) in which, if any, of following outlets would you like to see more fish options available?

How can we encourage the consumer to buy more fish when they are out and about?

In this question, by “more fish options” we mean more variety of fish available as well as new presentations of fish (e.g. new cooking format, new flavour combinations etc.). If respondents would not like to see more fish

options in any outlets they were asked to select the “Not applicable” option.

Below we see their responses to the above question:



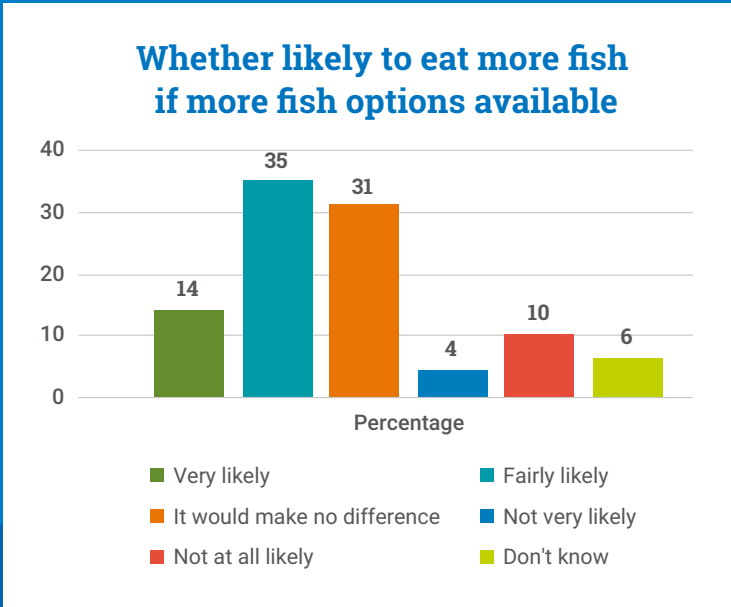
Base: All UK adults (2047).

Whether consumers would like to see more fish options available out-of-home

Aside from the 30% who are not interested in seeing more fish options in out-of-home outlets, and the 12% who “don’t know”, we can see here that over half the population (58%) are in favour of seeing more fish options available when they are out and about, either at work or for leisure.

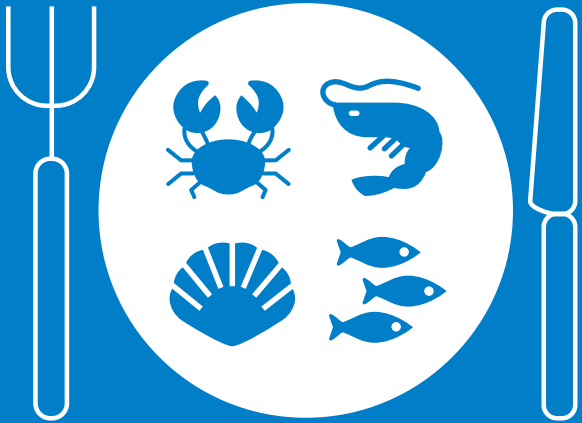
The supermarket meal deal was the most requested option (37%). We have explored this in qualitative research many times but it is very helpful to be able to quantify this. We now know that over a third of the population would welcome fish-based Meal Deals whereby a fish main course + sides are available for a fixed price in a supermarket.

This method could encourage consumers to try new types of fish as well as getting the benefits of a good value and nutritious meal.



Base: All UK adults (2047).

Here we see that almost half of UK adults (49%) feel it would be likely that if there were more fish options available in the outlets they buy from when out and about then they would eat more fish.



Food as function or as pleasure?

Here we asked the question, “In general, how often do you think of food in the following ways?”

Their responses are as follows:

“I view food as completely functional”

- 10% said all the time.
- 36% said sometimes.
- 29% said rarely.
- 23% said never.
- 3% don't know.

“I look for convenience in food”

- 13% said all the time.
- 62% said sometimes.

- 16% said rarely.
- 6% said never.
- 3% don't know.

“I view food as a real pleasure”

- 31% said all the time.
- 49% said sometimes.
- 13% said rarely.
- 4% said never.
- 3% don't know.

Base: All UK adults (2047).

Almost a third (31%) of the UK population view food as a real pleasure all of the time.

Ready to cook or cooked from scratch?

Here we asked the question, **“Thinking about buying and preparing the food that you cook, in a typical week how often, if at all, do you buy food in each of the following ways?”**

Their responses are as follows:

“Buy food that is ready-to-cook (i.e. ready-made)”

- 6% said all the time.
- 45% said sometimes.
- 37% said rarely.
- 10% said never.
- 3% don't know.

“I buy food that has some components pre-prepared so not all the meal has to be cooked from scratch (e.g. a jar of sauce)”

- 4% said all the time.
- 56% said sometimes.

- 28% said rarely.
- 10% said never.
- 3% don't know.

“I buy raw ingredients and do not buy anything that has been pre-prepared”

- 24% said all the time.
- 53% said sometimes.
- 16% said rarely.
- 4% said never.
- 1% don't know.

Base: All UK adults (2047)

Our research shows that a remarkable quarter (24%) of the UK population always buy all of their ingredients from scratch.

Effect of access to local ethnic restaurants on own cooking habits

Here we looked at the effect of access to local ethnic restaurants on consumers own cooking habits:

Their responses were as follows:

- Lots of access where I can buy/eat food from around the world so rarely cook for myself: 13%.
- Fair amount of access but also cook from scratch using authentic ingredients: 40%.
- Limited access so like to cook from scratch using authentic ingredients: 16%.

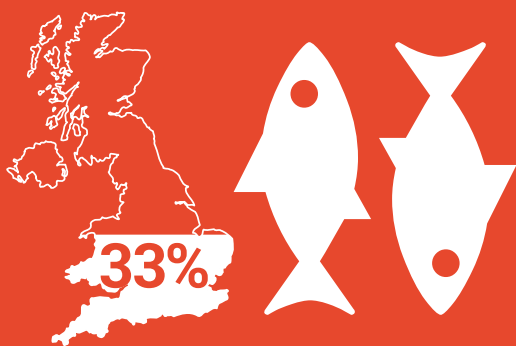
- Not interested in cooking any meals other than ones already cooking: 15%.
- None of these: 11%.
- Don't know: 6%.

Base: All UK adults (2047).

Here we see that 13% of consumers rarely cook for themselves due to access to local ethnic restaurants.

Conclusions

Looking at opportunities amongst consumers



How often do UK consumers eat fish?

- In summary a third (33%) of the UK population eats fish twice a week or more.
- Two thirds are not following the government health advice to eat fish at least twice a week but there is however scope to improve this.
- Older people (the 55+ age group) are twice as likely to be eating fish twice a week (42% of them do this), compared to the 18-24s year olds of whom only 23% are eating fish twice a week of more often.
- There is clearly work to be done on increasing consumption amongst on younger consumers.
- 9% of the population never eat fish and half of these are vegetarian or vegan.

Where do they eat fish?

- Of those who eat fish, 95% do so in home and 57% do so out of home.
- Of those eating out of home:
 - 81% eat fish in restaurants.
 - 76% eat fish and chips.
 - 58% eat fish when they are on holiday.
 - 38% buy fish sandwiches/snacks/salads etc. from sandwich bars.



Conclusions

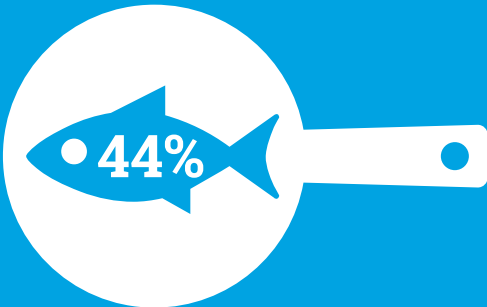
Why do people eat fish?

- Primarily because it is “tasty/delicious” (70%) but also because it is “healthy” (65%).
- 56% of consumers say they eat fish because it “Gives variety in my diet”.
- We need to emphasis the deliciousness of fish as well as its nutritional benefits.



Would they like to eat more fish?

- 35% say they eat about the right amount.
- 40% however, say they would like to eat “A little more”.
- A further 15% would like to eat “A lot more”.
- Over half of UK adults who already eat fish would like to eat more.
- We think this represent an open invitation to tempt them with more options from retailers, processors and food service.



Are they confident about cooking fish?

- Overall 44% say they are “Very confident” and 44% “fairly confident” about cooking fish.
- However 23% of 18-24s year olds are not confident - younger people need more advice on cooking fish.

How do they cook it?

- The majority (61%) bake fish in the oven.
- It is worth retailers and producers considering more oven-friendly fish offers which would be welcomed by the consumer - no mess, no smell, and minimal handling required.



Promoting health benefits

- There was a clear finding that if told of the health benefits consumers are likely to be encouraged to eat more fish.
- This was true of 70% of all the adults we interviewed.



Do they plan their fish buying?

- Most fish bought is a planned purchase (63%) but about a third of consumers buy half or mostly on impulse.
- There exists a clear opportunity at point of sale to entice these people to make a few extra purchases of fish products.
- This could be a chance for fish meal deals to make their debut.

Encouraging the population to eat more fish

- We also see clear indications as to which initiatives would encourage consumers to eat more fish.
- Money-off offers (naturally) appealed as did Meal Deals.
- There need to be ways of enticing consumers to try new fish or new dishes that are low risk.
- We know they can struggle with what to serve with fish so a Meal Deal where all the planning is done for them for a good value price could be a positive move.
- It would also work to increase their repertoire of fish dishes they are happy to cook and serve.



