

WHITE FISH AUTHORITY

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White Fish Authority,
Market Development Unit,
7 Ashley Road,
Epsom,
Surrey,
KT18 5AQ

White Fish Authority,
Sea Fisheries House,
10 Young Street,
Edinburgh,
EH2 4JQ

TECHNICAL REPORT NO. 107

A Market Research Report on
Consumer and Caterer attitudes
towards newly developed Oyster
Products

PREFACE.

BY THE WHITE FISH AUTHORITY.

As part of its research and development programme, the White Fish Authority has successfully developed large-scale methods of hatching and rearing the native oyster, *Ostrea edulis* and the Pacific oyster, *Crassostrea gigas*. Associated with this programme there is a need to find a market for the Pacific oyster which can be hatched and reared more easily and, it is believed, more profitably than the native oyster. If the Pacific oysters are to appeal to more consumers then it is considered that it will be necessary to diversify the presentation of these. Accordingly, as a stimulus a limited number of products has been developed by the Authority and demonstrated to selected audiences.

Some of the products, including frozen-breaded oysters, oyster in a Guinness batter and raw oyster meats supplied by the White Fish Authority to the Turk's Head, a Public House in Twickenham, have been on sale as part of the lunch-time menu and as an evening bar snack since the end of July 1972.

The object of this exercise was to find out whether the general public would be prepared to buy and eat oyster products in an ordinary commercial environment. This has proved to be the case, but during the first weeks of the trial, various reactions to the products and in fact to the concept of oyster eating generally, were expressed by the customers:-

"Wondered whether it was safe, no 'R' in the month".

"No shell - are they fresh?"

"Fear of poisoning " and so on.

Resistance was strong in some instances, particularly with regard to the fear of poisoning and it was therefore decided to commission some market research in an attempt to determine the strength of this resistance and, consequently, how it might affect future sales not only in the Turk's Head, but in any further marketing exercise. The attached report, (prepared under contract to the Authority by Marketing Assessment Limited, 29/30, Kingly Street, London, W.1.), reproduced in full, is the assessment of the attitudes expressed by consumers and the catering trade, during the exercise reported.

In reading this report it should be remembered that although the sample of respondents was too small to allow definitive conclusions to be drawn, several important attitudinal pointers emerged. Perhaps the two most important of these were:-

- (i) (from the consumer groups) that those not already initiated into the eating of raw oysters "reacted most positively to the cooked oysters, both at the Concept and Tasting stages of the group discussions, which would seem to indicate a point worth developing in any future research or marketing strategy".
- (ii) that the participants "favoured the idea of the whole range of the oyster products being made available to the housewife through the supermarkets.... because it would tend to 'popularise' the oyster which in turn would have the effect of more oyster dishes being served in restaurants....."

A Market Research Report on
Consumer & Caterer attitudes
towards newly developed Oyster Products

Prepared under contract to the White Fish Authority

by

Marketing Assessment Ltd.,
29/30 Kingly Street,
London, W.1.

1. INTRODUCTION.

This report sets out the findings from three group discussions held recently by Marketing Assessment Limited, in London and Weybridge, Surrey, to determine the acceptability to consumers and caterers of a range of Oyster Dishes developed by the White Fish Authority.

2. THE GROUPS.

2.1. Consumers.

Two of the groups were recruited from people who are in the habit of 'eating out' regularly; one of the groups (London) consisted of young people aged 35 years or under and the other group (Weybridge) was made up of men and women in the 40-55 years age group.

Both groups of respondents were drawn from the ABC1 social class, although some attempts were made to recruit a few C2DE respondents for the London group to obtain a wider mix. However, this proved unsuccessful because interviewers encountered difficulties in contacting a sufficient number of C2DE's who (a) fulfilled the basic requirement of 'eating out' regularly and were (b) willing to take part in an 'Oyster Testing'.

The London group consisted of 7 men and 4 women (wives/girlfriends) as follows:-

4 Executives	(3 male, 1 female)
1 Architect	(male)
2 Lecturers	(1 male, 1 female)
1 Designer	(male)
1 Engineer	(male)
1 Script Writer	(female)
1 Model	(female)

All respondents in this group were in fact in their late 20's and early 30's - it had not been possible to recruit anyone under 25 years of age who was willing to participate in an 'Oyster-Tasting'; of those taking part in the group, all but 2 (females) had eaten oysters more than once - 3 (2 male - 1 female) were especially keen oyster eaters.

The Weybridge group consisted of 6 females (all housewives) and 3 males (husbands - 2 Company Directors, 1 Dental Surgeon) - one further husband

had promised to attend, but, as the wife explained, had finally lacked courage for fear of 'making a fool of himself publicly' - he had never tried oysters before and felt convinced that he would not be able to 'face it' when it came to tasting them at the group discussion.

Of those who did attend this group, all but 2 (females) had eaten oysters more than once before - one woman proclaimed herself a 'dedicated' oyster-eater and one man said he used to be before they became too expensive for him.

Note on Recruiting of Consumer Groups.

It is perhaps worth noting here that the recruiting interviewer in the Weybridge area had no difficulty in selecting 10 respondents to attend an 'Oyster-Tasting' - apart from the one 'failure' reported on above, she contacted only 2 other households (ABC1), where she was given a refusal, in one case, because the respondents had previously tried oysters and had not liked them (Husband and wife) and in the other the husband 'claimed to have' experienced a severe gastric upset after eating oysters and neither he nor his wife were willing to 'chance it happening again'.

The London recruiting interviewer had to contact a total of 28 respondents aged between 22-35 years - she obtained 15 refusals, 13 of which were from respondents aged 22-26 years. All but 2 of these had never eaten oysters before and were not willing to try them:-

'I find the idea disgusting' (ABC1).

'It's not a thing I would normally order, so I can't see any point in it' (C2).

'I'd be frightened of getting ill - you never know with that sort of thing' (ABC1).

'I wouldn't touch fish of any sort, particularly not that kind of thing' (C2).

'I saw some once and it made me sick just to look at them' (DE).

Of 2 refusals from the 'over 26 years' age group, one was simply due to lack of time to attend, the other was from an executive who had

eaten oysters regularly for a time, but had 'given them up' after eating some 'dodgy ones' with very ill affect.

It is obviously impossible to draw any meaningful conclusions from such a small sample of respondents, but it is interesting that talking to these contacts, the interviewer (who was a trained sociologist and therefore well able to interpret people's attitudes) got the overall impression that the younger ABC1's (i.e. those under 26 years) were still very much at the beginning of their 'eating-out' careers and were still 'finding their feet'. This meant that when eating out they tended to order mainly dishes which contain a familiar base-ingredient, such as scampi, plaice, sole, steak, beef, veal etc., presented in an unfamiliar way through the use of 'exotic' spices, sauces, cooking methods. They were not yet sufficiently 'experienced eaters-out' to be willing to experiment with unfamiliar base ingredients, such as oysters, mussels, octopus etc., because they tended to feel threatened in their social standing by the possibility of 'making a fool of themselves' not only in the eyes of their potentially more experienced peers, but more particularly in front of the 'experts', i.e. the restaurant staff, by either not knowing how to eat a particular dish (such as oysters on the shell, lobster in shell etc.,) or through not being 'brave enough' to actually eat the food once it was served, and thus being put in the humiliating position of having to make an excuse to all concerned.

The 'over 26's' had largely overcome this stage of uncertainty and had established fairly well defined habits/attitudes in terms of food/eating out, to which they tended to adhere rather rigidly. Those in the older group (40-55 years) were more relaxed in their attitudes, and it is for this reason that the two consumer groups are reported on separately, with a combined summary.

2.2. Caterers.

The third group of respondents was recruited from a variety of fairly up-market Restaurants/Pubs/and Hotels with a large non-residential lunch/dinner clientele in or around the Weybridge area:-

Oatlands Park Hotel
Lincoln Arms
Ship Hotel

High Pines Club
London Steak House
Casa Romano (1 star in Egon Ronay Guide)
Le Petit Gourmet
Angelo's
The Akropolis

Although the recruiting interviewer obtained only 10 definite 'promises' to attend, in the event 16 respondents actually came to the group discussions, which was held on a Monday afternoon; all but 1 of the restaurants were open for dinner on Monday night. The participants were mainly Managers, Catering Managers, Trainee Managers, Head Chefs and Chefs.

Two of the restaurants serve oysters, (fresh on the shell), when ever available; some serve scampi/lobster or other shell fish (mussels) - all do fish dishes such as sole etc.

2.3. Method.

Respondents were asked to attend an informal gathering for the purpose of discussing their 'eating-out' habits (consumers) and to take part in the tasting of various 'Oyster-Dishes' about which they were to express their opinion (consumers and caterers).

At the group discussions, members were asked to talk about their attitudes to certain foods when 'eating-out', and their attitudes to oysters in particular.

They were then exposed to the concept (verbally and with the aid of photographs) of the proposed range of oyster-dishes, and their reactions to each dish was noted.

Finally, respondents were served the oyster dishes, accompanied by a light fairly dry Moselle wine, in the order shown below and their 'Post Concept' reactions were again noted and finally compared with their initial Concept reactions.

Order of Dishes.

- i) 'Raw' Unfrozen Oysters on a dish set on ice, decorated with parsley and served with lemon-quarters, accompanied by brown bread and butter. (Respondents were given the option whether to taste these or not).
(Discussions).
- ii) Breaded Oysters and Oysters in Guinness Batter;
(Discussion).
- iii) 4 Oysters on the Half Shell, covered with Florentine Sauce, Spinach and Pernod, Sauce Mornay and Spiced Tomato Sauce.
(Discussion).
- iv) Oyster Flans - Mornay and Florentine
(Discussion).
- v) Oyster Pies - in London - Plain Oyster
 Chicken
 Steak and Kidney
 in Weybridge - Plain Oyster
 a. (Consumer) Mushroom
 Steak and Kidney
 b. (Caterers) Plain Oyster
 Mushroom
 Steak and Kidney

(Discussion)
- vi) Vol-au-Vents were not served, because the ingredients were not inherently different from those tasted in the pies and also respondents were simply unable to cope with yet another dish - however, all were shown the actual product in the frozen state.

Note

As there were no overwhelmingly negative reactions against any one dish in the Taste-Test, the moderator has concentrated in the reporting on the Pre-Tasting/Concept stage at the discussion, as it was felt that this would be at greater benefit to the client in giving an insight into the existing attitudes/motivations towards oyster-eating.

4. MAIN FINDINGS

4.1. Consumer Groups.

A. The Under 35's (London)

A.1 PRE-TASTING - General.

All respondents taking part in this group had been pleased to accept the invitation to attend an "Oyster-Tasting". All but 2 (females) had eaten oysters before, had liked them and were delighted to have the opportunity of trying them again at no cost to themselves.

The two women, who had not previously experienced the taste of oysters had been somewhat less enthusiastic about the project and had partly come along because their men-friends had been unwilling to attend on their own, but they also felt that this 'informal' way of being introduced to oysters was a perfect opportunity of finding out how they would react, so that in future they would be able to decide on the basis of experience, whether to order oysters or not in a restaurant.

All group members were in the habit of eating out on average about once a week, either for lunch (mainly the executives) or dinner, and more than half the participants often tended to choose special Fish Restaurants for their meals (mainly dinners). It was felt that fish-dishes were more troublesome to prepare at home than meat-dishes, and people therefore liked to take the opportunity of eating 'expertly prepared' fish when dining out.

"It's messy to do at home and you never know how it's going to turn out".

"The kitchen and sometimes the whole house reeks of fish for days after you've cooked some, so I'd rather not bother".

"I can't bear to touch the raw fish - I couldn't eat it if I cooked it myself. Fish-fingers for the children is different of course, but I'd hardly consider that REAL fish, if you see what I mean".

"I am unable to tell good from bad - in other words fresh-fish when I see it on the slab at the fish-mongers, so I'd rather leave it to the experts".

As will be seen later, great reliance was placed on the "Expertise" of restaurant staff.

All group members had eaten and expressed a liking for scampi, prawns, lobster, langoustine etc. and considered these to be fairly standard dishes which they would expect to find on the restaurant menu as either starters or main courses.

Oysters and mussels were seen to be essentially different from the above, in that they were "more unusual" in term of availability "you don't see them on the menu quite so often" "not even all fish restaurants serve them") and that they were potentially more "dangerous" than the other types of crustacea mentioned. All participants felt that oysters in particular were likely to cause severe stomach upsets unless they were absolutely fresh. 2 respondents had expereinced this; the same applied to mussels. In practical terms, this attitude on the part of the respondent meant that they tended to be very choosy not only about the type of restaurant in which they would order oysters (i.e. it had to be reputable), but also about the location in general - e.g. while some of the better London restaurants (Wheelers & Bentleys in particular) were considered perfectly suitable places for oyster-eating, none outside the immediate metropolitan area were deemed so. However, this was largely attributable to lack of experience of restaurants outside the London area, because respondents also felt that basically only the reputable restaurants (run by "experts") would serve oysters in any case, so there was really no need to be overly careful. Some respondents mentioned parts of Ireland, France and the coastal regions of the USA as being particularly good places for oysters - all these areas had been visited by some respondents.

None of the respondents in this group was able to envisage ever ordering oysters in a Pub, but in fact none had ever had the opportunity of doing so and only one had ever been to a Pub in which Scampi (breaded) were being served.

On the whole the members of this group felt that the current image of oysters - that of being an extremely expensive luxury food - simply conflicted with their present experience of Pub foods (pies, salads, sandwiches, cheese etc.).

Only two of the participants had ever heard of an oyster (or shell-fish) season (they're o.k. in the winter but not in the summer, I think it's something to do with the months with an R in them"), but all felt that, whether true or not, this aspect was no concern of theirs, as they fully relied on the expertise (again) of the restaurateur, i.e. -

"I would not expect to be served oysters when they are not in season - so whatever the time of year, if there are oysters on the menu, they must be o.k."

"It's up to the restaurant - I only order things I see on the menu, if I can afford them that is."

One woman thought that when the English oyster season finishes restaurateurs and high-class fish mongers had oysters flown in from Portugal to extend the season.

A.2. FROZEN vs. FRESH OYSTERS.

When questioned about their attitudes to FROZEN vs. FRESH foods all group members felt that frozen foods in general were inherently different from, though not necessarily inferior to, fresh foods. The actual differences were largely indefinable ("well something is lost when you freeze something - it's just no longer quite the same thing as the original before it's frozen"/ "The taste is not quite the same as when it's cooked from a fresh state"), but the advantaged (year-round availability / labour-saving) were such that the differences were considered important.

However, in the case of shell-fish, such as scampi, prawns etc. the FROZEN product was often considered preferable to the fresh, because respondents felt that they would be getting an essentially 'safer' product; it was assumed that the fish would be frozen virtually as soon as it was caught ("while it's absolutely fresh") and before any deterioration could take place. The housewife or the restaurateur would then have complete control over when to unfreeze the product for serving raw or cooking and there was therefore less likelihood of gastric upsets.

Reactions to the idea of FROZEN vs. FRESH OYSTERS on the whole tended to be the same as those reported above, but there were distinct differences in attitude between what might be called 'committed' oyster eaters (the minority) and the less committed including those who had never eaten oysters. The latter group found the idea of frozen oysters highly acceptable, again because they felt they would be far less inclined to "worry" about any possible after-effects from eating this type of oyster and for this reason they favoured the idea of being specifically told in the restaurant menu that they were being served 'frozen' oysters. The 'committed' oyster-eaters, however, thought that the freezing process would be likely to destroy the very delicate flavour of the oyster and therefore the main pleasure derived from eating oysters would be lost. These respondents said they would not be inclined to order oysters from a menu which stated that the product had been frozen.

A.3. RAW vs. COOKED OYSTERS.

All but the 2 group members, namely those who had not previously tried oysters, stated most emphatically that the most acceptable way of being served/eating oysters was raw (or 'frozen' raw) on the $\frac{1}{2}$ shell, which was considered to be the 'traditional' way. Only very few had ever eaten oysters in any cooked form (Paella/omelette) and had not found this a worth while experience. The general opinion was that not only would any cooking process destroy the delicate flavour of the oyster, but, furthermore, the intrinsic value (glamour) of the product would be lost when combined with more ordinary ingredients. Although less obviously stated, the moderator feels that this latter aspect highlights the more important underlying attitudes/motivations among oyster-eaters in this group of young respondents. Being able to order and eat fresh oysters on the half-shell would seem to confirm, both to the respondent himself and the people he feels compelled to impress favourably (superiors, peers, competitors in his sphere of work; members of the opposite sex etc.) that he has 'at last' attained not merely the required degree of financial status, but more importantly, the level of sophistication to which he aspired in his early 20's. For this, the respondent is willing to pay the current high price of oysters.

"If you're going to splash out and have oysters, you might as well have them in the proper way (on the $\frac{1}{2}$ shell) so that everybody can see - I mean there is no point in paying all that money for something that's disguised in a sauce or a pie, is there?"

It was assumed by everyone that all cooked oyster dishes would be as expensive "per oyster" as the fresh half shell oyster but would nevertheless have the image of being "ordinary" "not very glamorous" (like scampi or chicken) and would hence no longer serve as an obvious status symbol.

None of the respondents believed it would be possible to produce any more plentiful (hence cheaper) oysters - if such supplies existed, these would immediately be bought up by the 'up-market' restaurateur and served in the traditional way (on the $\frac{1}{2}$ shell) for the same high prices, since demand for outreached supplies at the moment.

"I mean they'd fly them in from anywhere - no matter at what cost - because there are always people with enough money to pay for them."

"I can't see how any one could produce any cheaper oysters in quantity - they still take ages to grow and there'll always be a queue of people waiting to snap them up."

"In the unlikely event of oysters ever becoming as available and everyday as chicken, say, perhaps as a result of different farming or marketing techniques or whatever, then one would probably be looking for other ways of eating them. But in the present circumstances I would certainly not be prepared to eat them in any other way (than fresh on the $\frac{1}{2}$ shell) and still pay the price."

The two (female) respondents who had not previously eaten oysters reacted completely differently from the other members of the group - they felt that the disguise of the actual oyster-meat through

batters or by combining it with other ingredients would be highly appreciated, because one of their main objections to oysters is the visual aspect of the raw meat lying in it's shell.

A.4. INITIAL REACTIONS TO PROPOSED RANGE OF OYSTER DISHES.

Given the above reservations about cooked oysters in general, respondents in this group reacted somewhat negatively to some of the proposed range of dishes. They found it difficult to accept the idea of some of the ingredient combinations, largely because of two main objections:-

1. The oyster has such a delicate flavour that this would be bound to be completely lost when combined with other ingredients of stronger flavours, i.e. cheese, tomato, spinach, steak & kidney - hence it would be a waste of time (and money!) to bother to include oysters in any of these dishes, except possibly for the chicken/oyster combination. However, as chicken tended to have the image of a 'poor man's food' nowadays, there tended to exist a conceptual dichotomy as far as these two ingredients are concerned, i.e. relatively cheap vs. 'very expensive' 'ordinary' vs. 'glamorous/exciting'.

"You wouldn't be able to taste the oysters in all the flavours."

"Why would you bother adding something to a thing that is perfectly delicious on it's own (i.e. oysters)".

"I suppose oysters might glamourise the chicken, for instance, but would you be willing to pay a lot more for getting a better chicken dish when what you really want are the oysters."

2. The secondary reason given for objecting to any combination of oysters with other ingredients (particularly pies, flans etc.) are felt by the moderator to be rather more important. These are that the respondents feared they would be cheated in some way by the restaurateur/manufacturer by being made to pay a great deal of money for something (oysters) which would be present in only very small quantities:-

"I know what would happen - you'd buy a bit of chicken and oyster pie for instance and all you'd get would be one oyster per square yard. Then they'd charge you three times as much as they would for a chicken pie".

"Mushrooms and oysters - well neither would improve the other's flavour and you'd get a ratio of 99 mushrooms to one oyster, for which they'd expect you to pay the earth".

"In a plain oyster pie or flan or whatever they'd have to put in quite a few oysters, but who knows what they'd do with the others".

One other aspect mentioned by the respondents was that the 'manufacturer' might be using second rate oysters, in terms of freshness and size, in the cooked dishes ("one asks oneself - what are they trying to disguise!") but the moderator feels that this is a rationalisation rather than an important point in the motivation to buy any of the proposed oyster dishes.

A.5. PRE-TASTE REACTIONS TO SPECIFIC PRODUCTS.

(At this stage respondents were shown some of the photographs provided).

- a) Breaded Oysters - Although respondents were able to accept the idea of 'breaded' oysters, some thought the combination of (egg) breadcrumbs and oysters (inexpensive vs. very expensive) rather strange ("just like fish-fingers"), but most thought they might try them if they saw them on a restaurant menu "just to see what they were like". The two non-oyster-eaters thought they would definitely try them under the same circumstances. All placed this product in the "starters" category. Some thought they might have them "just with a drink", not necessarily a meal.
- b) Oyster in Guinness Batter - The Guinness and oyster combination was thought to be an interesting idea and all respondents thought they would probably try this if seen on a restaurant menu. A few had reservations about the thickness of the batter, i.e. would it completely swamp the oyster so that the only thing you would taste was "a doughy mess". These too were thought of mainly as starters.

- c) Oysters on the $\frac{1}{2}$ Shell in Various Sauces - Respondents reacted fairly favourably to the idea of these products, particularly because of the "realistic" oyster presentation on the $\frac{1}{2}$ shell. Attitudes towards the proposed 'sauces' were rather non-committal on the whole, but about half the group members disliked spinach and were therefore not keen on the idea of the "Spinach and Pernod" combination - the remainder thought that the Pernod would make this combination rather exotic and worth trying. All participants identified this group of dishes as "starters", but some thought they might also be served as a main course. When eaten as a starter, respondents would expect to be served 3 half shells, possibly accompanied by bread or crispbread and butter, when eaten as a main course, half a dozen $\frac{1}{2}$ shells, served with a plain or mixed salad, was thought to be an ideal number.
- d) Flans and Pies and Vol-au-Vents - Reactions towards this range of products were either non-committal or negative. The main reasons for this were:-
- i) Respondents were not usually in the habit of eating this type of dish either at home or when going out for a meal, partly because it was perceived as rather ordinary and unadventurous and more importantly because pies, flans etc.. "Contain a lot of unnecessary stodge" in the form of pastry/flour in the sauce etc. and were therefore only to be eaten "when you're absolutely starving to fill you up", or in terms of home-cooking, to be considered mainly as a useful method of using up "left-overs" (meat in particular).
 - ii) Group participants had difficulties in identifying the relative positioning of such products in any restaurant menu, i.e. would they be served as starters ("too filling") or as a main course ("a bit boring") or even as a savoury last course (which it was not usual for them to order).
 - iii) Thirdly there were some 'negative reactions' to some of the flavour mixes, notably that of "steak, kidney and oysters". None of the group members were aware that this is in fact a traditional English dish. A number of respondents said that this might well have been

so in the days long past when oysters were considered a 'poor man's food' because of their cheapness and would therefore have combined well (in terms of conceptual image) with 'steak and kidney pie' which all preceived as a rather 'working-class' dish. In the present day, when oysters (like caviar) were so expensive ("and an absolutely luxury") respondents felt that the proposed combination was highly unapt. Furthermore, the flavour of the steak and kidney mix was thought to be too strong for the oysters to make any noticeable difference in the taste.

The Plain Oyster Pie, the Mushroom and to a lesser extent, the Chicken versions were found in theory to be the most acceptable; reaction to the idea of the Mornay and Florentine Flans were entirely non-committal and the Vol-au-Vents were dismissed as being too "ordinary" ("the kind of things you'd eat in a Joe Lyons and places like that".) Respondents did not think that they would under any circumstances be likely to order any of the dishes discussed in preference to fresh (including 'unfrozen') oysters on the $\frac{1}{2}$ shell, but in a restaurant where this choice was not available, they would be prepared to try these dishes, (with the possible exception of the pies, flans, etc.)

A.6. THE TASTING.

a) "RAW" OYSTER-MEATS (Unfrozen).

As mentioned earlier, respondents were first served raw oyster-meats, presented on a white porcelain dish, decorated with fresh parsley and lemon-quarters which was set on a bowl of ice. With this were served thin slices of brown bread and butter.

Group members were given the choice of whether to try these oyster meats or not. In the event all but one (female who had not had oysters before and didn't like the look of them now) tried the oysters and reactions were entirely favourable - even, to their own surprise, from the "committed" oyster-eaters. Both the flavour and the texture were thought to be:-

"Very good"

"Much better than I would have thought"

"Even better than some fresh ones I've had"

"They're delicious - they've retained their delicate flavour remarkably well"

"I think they do compare quite favourably with the real thing"(!)

All (except the one non trier) said they would be perfectly willing to order and eat "raw" oysters of this quality in any restaurant PROVIDED, and this is an extremely important point, the presentation could be vastly improved, i.e. anything less than being served in a $\frac{1}{2}$ shell ('even if it's imitation') or on a specially designed dish was deemed unacceptable.

b) Breaded Oysters and Oysters in Guinness Batter.

These two products were served simultaneously; all group members tried both versions. Reactions to the Oysters in the Guinness Batter were very favourable (but again with the proviso that nothing really compared with the 'fresh' oysters), largely because the batter was judged to be of very good quality (very light in texture and only thinly coating the oysters), but a number of respondents did not care for the dark-brown colour of the batter. However - when reminded of the Guinness connection all thought the colour would probably be quite acceptable after all.

The Breaded Oysters were generally quite liked but found less acceptable than the "battered" variety. Respondents again remarked that the "breeding" was of a very high standard and it was largely for this reason that the product received any favourable reactions. On the whole, respondents were still very pre-occupied with the "fish-fingers" - "frozen fish in breadcrumbs" image when confronted by this product.

The attitude to both these products after tasting had improved quite considerably when compared with the Concept stage, but the participants still felt that it was a pity to get away from the 'original' raw Oysters, particularly as both these products were thought to have suffered an impairment of flavour in the cooking process:-

"You can't really taste the oysters - it has no fishy flavour".

"It could have anything inside it - the oyster taste is lost".

Respondents did feel, however, that they would be quite likely to order these products, provided they were not too expensive; some thought they might be served as 'starters' in a restaurant, most had difficulty in trying to 'place' them in terms of menu category or the type of restaurant in which they might be served.

"Perhaps they would be the sort of thing you might have in a better class pub - if you had them in a restaurant what would they be served with?"

No-one felt that these products would be suitable for selling to the housewife through the supermarket.

On the whole, group members were of the opinion that these products should be less expensive than fresh oysters on the half shell.

c) Oysters on the $\frac{1}{2}$ shell in various sauces.

Visually, these dishes made great impact and the reactions were entirely favourable. However, when the individual versions had been tasted, respondents felt that while the visual presentation of the product tended to strengthen the 'Oysters' image, the taste of the dishes detracted considerably from the basic concept:-

"They look super, but when you eat them the oyster becomes entirely superfluous - it could be replaced by almost anything you care to put in or you could just as well have the sauce only."

"These is certainly no oyster flavour - all you can taste is the sauce".

"I almost wonder whether any of these actually have any oysters in them - I couldn't taste any".

As can be seen, the respondents were still very much defending their basic image of 'real' oysters; they found it almost impossible to judge these dishes on their own merit but tended to compare them always with the 'fresh raw oyster' on the shell.

Of the individual dishes, the Spinach and Pernod combination was thought to be the most exciting, both in presentation and taste, but only about half the group members actually liked the taste of the dish - remainder were not very fond of spinach and were

therefore not keen on this combination. All thought that the addition of Pernod had given the dish an interesting 'herbal' flavour.

The Mornay version of oysters on the half shell was liked by everyone but was thought to be rather 'ordinary' or even 'dull' and again respondents felt that the cheese flavour was too "heavy"/"overpowering" to allow the oyster-flavour to come through.

The Florentine half-shell dish produced very non-committal reactions, as it was seen to be very similar to the Mornay version (which was the preferred of the two) and the inclusion of spinach did not add anything to the taste in this dish (was in fact, a draw-back as far as those who did not like spinach were concerned).

The Spiced Tomato version of this dish was the most readily accepted by this group of respondents, because although there tended to be connotations of "Spaghetti Sauce", the sauce was nevertheless so delicately flavoured that the taste of the oyster was allowed to come through.

Overall, in spite of all the criticism levelled against the individual dishes ("I still don't understand why they can't just serve those frozen oysters uncooked on a $\frac{1}{2}$ shell and have done with it"), most respondents (particularly those who had not previously eaten oysters) thought they would "very likely" order these dishes if seen on a restaurant menu, provided again that they did not compete with 'fresh oysters on the half-shell'. It was assumed by all present that these dishes would be no cheaper than the usual fresh half-shells and they would therefore tend to be eaten on special occasions only. When considering the possibility that these dishes might be in fact made available at a lower cost, most thought that under those circumstances they would certainly order them if given the opportunity. The order of preference was:-

Oyster on the half shell with Spinach & Pernod.

Oyster on the half shell with Spiced Tomato.

Oyster on the half shell with Mornay.

None chose the Florentine version.

When discussing the possibility of selling these products direct to the consumer via the Supermarket freezer, virtually all respondents thought that these dishes would be "too exotic" and "too expensive"

to appeal to the average housewife, except possibly for a really special dinner party.

d) Oyster Flans.

Both the Mornay and Florentine flans were described as "basically a nice cheese flan" which did not really taste of oysters. Of the two the Mornay version was preferred, because the Florentine flan was found to have a slightly bitter taste. None of the respondents felt that either of these products could be described as "oyster-dishes", particularly as there was nothing to visually to identify them as such:-

"If you had partridge or pheasant in a flan it would probably have a couple of feathers sticking out of it. I don't know how you'd produce a similar effect with an oyster flan, but I feel there should be something to show it is oysters".

All taking part in this discussion/tasting stated fairly categorically that they would be unlikely to order this type of dish in a restaurant - partly because it was not thought to be sufficiently exciting and partly, as has been pointed out in the PRE-TASTING Section, respondents felt that these products did not easily fit into any particular category on the menu. However all the female and some of the male participants thought these might well be products which could be sold to the housewife via the Supermarket - Marks' and Spencers' range of frozen foods was particularly mentioned in this context:-

"I think Marks and Spencers is the ideal place for this.

Their Canneloni Lasagna and Chicken Kiev all taste essentially the same, but people buy them like mad - myself included - because they are a bit more glamorous than frozen beefburgers and it saves you cooking.

"I would think this is just the sort of thing the housewife would go for - it's a bit unusual and yet the kind of frozen product people want nowadays, like those things they sell in Marks and Spencer and some other decent food departments".

"This is commercially a great proposition - bung it in a box with a super oystery picture on it and everybody will buy it. I can't imagine that any one would want to serve or eat it in a restaurant. A snack bar, maybe but then it doesn't seem quite the right sort of fish for that, does it?".

"Harrods do a fantastic quiche in their deep-freeze - much better than I could do myself - so I think this would fit very well into their range - it's essentially a good quality product, isn't it".

e) Oyster Pies.

The group were first served small portions of a Plain Oyster Pie and all but 2 respondents liked the taste of this product very much, because the pastry was light and flaky and the sauce delicate enough to allow the flavour of the oysters to come through very well. There were also a sufficient number of oysters present to be noticeable. The two who did not react so positively said that they were basically not in favour of this type of product rather than have any specific dislikes of this particular dish. They agreed that the taste was perfectly acceptable but that they would not normally choose to eat any pastry-dishes of this kind. All felt that this product would be suitable as a main course but not as a starter because it was thought to be "too filling".

Respondents were then served the Chicken and Oyster Pie and all reacted very favourably. This was mainly because the product itself (quite apart from the oyster aspect) was thought to be of very high quality, i.e. the pastry was praised for its lightness and respondents were impressed with the amount of well-flavoured tender chicken the pie contained. Respondents felt that this product should be correctly described as a 'chicken pie with oysters' and most thought that the oysters had not added greatly to the overall excellence of this product in terms of taste.

However, the addition of the oysters certainly tended to give this dish an aura of glamour it would otherwise lack.

f) The Steak/Kidney and Oyster Pie was noted for its particularly strong kidney flavour which tended to totally disguise the taste of either the steak or the Oysters.

All respondents felt that the addition of oysters to this dish accomplished nothing whatsoever in terms of flavour:-

"I separated out the oysters and ate them singly - they could just as well have been bits of kidney, because that's what they tasted like".

"All I can taste is kidney - nothing else at all".

Those who normally liked steak and kidney pie (less than half) thought it was a good product of it's type - irrespective of the oyster-aspect - the remainder did not particularly care for the steak and kidney flavour in the first place and as the oysters could not be tasted, they tended to dismiss this product as being acceptable.

It should be remembered that this dish was served as the last item of an extensive range of products and group members tended to feel rather sated at this stage. When served to a hungry gathering, reactions might well have been different.

A.7 Conclusions after Tasting.

With the exception of the Oyster-Flans and the Steak and Kidney Pie all dishes in the range tested performed slightly better at the Tasting stage of the discussion than at the Pre-Tasting Concept stage. Although respondents were still inclined to make direct comparisons, in terms of overall acceptability, with the traditional raw oyster on the half shell, they were sufficiently impressed by the high standard and variety of the dishes presented to be able to express a fairly high level of interest in ordering or buying these types of products if given the opportunity, NOT AS ALTERNATIVES to existing oyster dishes, but as entirely separate entities. They particularly favoured the $\frac{1}{2}$ shell dishes and the Plain Oyster and Chicken and Oyster Pie.

B. The Over 40's (Weybridge).

B.1. PRE-TASTING - General.

All the people attending the Weybridge Group Discussion had been very keen to come along to an 'Oyster-Tasting', largely for the some reasons given by the 'young' London group, i.e. those who had eaten oysters before felt they would be given a "treat for nothing" and the two (females) who had never tried them were

delighted to have the opportunity of doing so.

Two of the group members (1 male, 1 female) were 'dedicated' oyster eaters.

All respondents said they tended to eat out fairly often (about once or twice a month) - mostly in the evening - but not as frequently as they had used to when they were younger, because they were nowadays more likely to have dinner-parties at home. The women usually lunched at home (or skip lunch altogether) and the men generally had snack-type lunches in Pubs. Compared with the London Group, these respondents very seldom ate at Special Fish-Restaurants - this was partly from choice and partly because they tended to choose local restaurants for their meals, and there were few Fish-Restaurants within reasonable reach.

The members of this group further differed from the London Group in that they did, on the whole, favour meat-dishes when eating out - certainly for a main course. Generally, respondents thought that they would probably choose a fish-dish about once every four or five occasions when eating out. The reasons for this was mainly that the range of fish-dishes served in their 'usual' restaurants tended to be somewhat limited (salmon, trout, Dover or lemon sole) and as they normally frequented the same half-dozen or so 'favourite' restaurants, they were soon familiar with the dishes offered.

The housewives were not normally in the habit of preparing main-course fish-dishes for their dinner parties, because they thought this tended to be rather complicated (and 'messy') and would further require the kind of raw materials not easily obtainable locally. In this respect the group's attitude was the same as that reported for London.

However, these respondents would more often than not choose a fish-dish for starting the meal - both when eating out and when entertaining at home; scampi, prawns, scallops, mussels, lobsters and oysters were mentioned in this context.

As was reported for the London Group mussels and oysters were seen by this group too as being inherently different from the other above mentioned crustacea, and for largely the same reasons, i.e. one had to be more careful of avoiding any second-rate ("not fresh"/"not clean"/"not well prepared"/"not carefully chosen") product because of the possibility of stomach upsets. One man had experienced a severe bout of "gastroenteritis" after eating mussels - none had ever had any problems with oysters in this respect, but all thought that oysters were "even more dangerous", because they were eaten raw. Everyone in the group had heard a number of stories relating to oysters and upset stomachs - one man claimed to have heard of a death actually ascribed to eating "bad oysters".

In practical terms, this 'awareness' of possible dangers resulted in very much the same behaviour patterns as those reported on for the London Group i.e. the respondents were generally very selective about the type of restaurant in which they would order oysters or mussels, but whereas the London Group tended to assume that the right 'pre-selection' had already taken place, i.e. only reputable restaurants would serve these kinds of dishes and the risks were therefore minimal, the Weybridge respondents felt that this was not necessarily a correct assumption (less so when eating abroad) and that they would prefer to rely on their own judgement.

It is interesting to note, that all the 'over 40's', group were aware of a shell-fish 'season' (only two London respondents had heard of this), and all felt that this particularly applied to oysters/mussels rather than scampi/prawns etc., because the latter were generally frozen in any case and hence available year-round. This was another reason for perceiving oysters /mussels to be different from other crustacea.

While none of the London Group participants had been able (or possibly willing) to relate any 'old-wives' tales relating to oysters, the Weybridge respondents mentioned several:-

"They're supposed to act as an aphrodisiac. If you eat a dozen oysters per day you're supposed to be O.K. in that department till the day you die". (male).

"I've heard they keep you young - they've got some sort of special vitamin or something that acts on your blood-stream. But I expect you'd have to eat lots of them before it had any effect". (female).

"You must under no account drink spirits either before or while eating oysters which is why we (husband and wife) haven't had a drink before we came. I know for a fact that this is true because some friends of ours once served oysters at a dinner party and they had a couple of stiff whisky's before the guests arrived. Well, after we'd eaten the oysters, they disappeared into the kitchen to bring in the next course and they just didn't come back. When we investigated, we found them both passed out on the floor and the doctor had to use a stomach-pump. He later said it was because of drinking spirits with oysters. Luckily the rest of us had only had sherry and wine".

When gently probed by the moderator, the couple relating this last story remained firmly convinced of the accuracy of the doctor's diagnosis and absolutely rejected the suggestion that their friends' alcohol intake might have had something to do with their condition ("although I must say they do rather like their drink")! At this stage another member of the group said that he had also heard that one should not drink spirits while eating oysters:-

"It's any drink based on grain rather than the grape that does the damage. Apparently the drink knocks out the live oyster in a funny way and makes it undigestible".

B.2. FROZEN VS FRESH OYSTERS.

Most of the Weybridge respondents thought that, on the whole, frozen foods were in no way inferior to "fresh" foods - with rare exceptions, such as certain soft fruits for instance - and half the households represented at the group in fact owned a deep-freeze. The general opinion was that raw fish, including scampi/prawns etc., and cooked fish-dishes, were eminently suitable for freezing and would suffer no detrimental effects.

When asked specifically about their reactions to the idea of frozen oysters, respondents wondered whether it would in fact be possible to successfully freeze these:-

"You can't freeze everything, some things are not suitable".

"I'm not sure whether you would still be able to eat them when they were unfrozen - perhaps they'd just sort of shrivel up during the freezing process".

However, all said that if they saw frozen either advertised or sold in fish-mongers or supermarkets they would be convinced that oysters could be frozen without being essentially changed in anyway. They would have no objections whatever to eating raw unfrozen oysters (it was assumed by all that these would be served uncooked in the traditional way) and the attitude of this group was (as was that of the London Group) that 'frozen' oysters might be in some way preferable to the fresh variety. The reasons for this were again largely the same as those given by the 'under 35's' i.e. it might be 'safer' to eat 'newly unfrozen' oysters than 'fresh' ones which might not be 'quite as fresh as they should be'.

"I mean you wouldn't unfreeze them hours before they were needed and also you'd do only the quantity required so there would be no danger of them going bad after unfreezing. They would, of course, have been completely fresh when they froze them, wouldn't they?"

The other benefit of freezing the oysters would be year-round availability.

The two 'dedicated' oyster-eaters thought that some of the delicate flavour of the oyster might be lost in the freezing process, but

"You wouldn't know until you tried them, would you.
I would certainly try them".

All declared themselves prepared to try 'frozen' oysters in a restaurant, but would prefer to be told on the menu that this was being served. The two non-triers thought they would be more likely to try frozen oysters than fresh ones because:-

"At least they are dead while the others are still alive, aren't they?"

Some of the housewives mentioned spontaneously that they would probably buy frozen oysters if they saw them in the supermarket and they were not too expensive, for use at a special family occasion or a dinner party. It was assumed that the oyster-meats would be separated from the shell and then frozen and that one would be a pack of oyster-meats with the shells in a separate bag (not unlike the way in which tinned snails are sold in some shops with a bag of shells attached to the tin) or alternatively one would buy the shells separately only once and re-use them subsequently. Some thought that scallop-shells might be used as a substitute.

There were no negative reactions to the basic concept of frozen oysters.

B.3. RAW VS. COOKED OYSTERS.

So far in the discussion no-one had mentioned the possibility of cooking oysters - when asked whether they had ever eaten cooked oysters, most were rather surprised at the idea and none thought they ever had:-

"I suppose I might have in one of those dishes I used to have in the Far East but I didn't notice and I certainly haven't in England."

"Well, I think you're supposed to put them in that Spanish dish with the chicken and mussels and all that, but I can't recall ever being aware of eating them like that".

The 'dedicated' oyster-eaters tended to react in the same way as most of the London Group had, i.e. they thought it would be "a shame to spoil a lovely thing like oysters by cooking them" and some felt there was a possibility that the "delicate flavour" of the oyster would be lost. However, whereas the London Group on the whole tended to take this stand for mainly 'social' reasons, it was evident in this group of rather older respondents that their reactions were not motivated by this aspect. In fact, once they had absorbed the 'novelty' of this concept, respondents became fairly enthusiastic about the idea of cooked oysters - particularly those who had not eaten any before (same reasons as London Group). However, all thought it would be difficult to devise suitable flavour-combinations which would not completely blot out the

taste of the oysters. One woman spontaneously mentioned "putting them in a light batter might be nice" and most group members tended to agree. Respondents in this group were astute in making the connection between the 'frozen' oysters talked about before and assumed that it would be these which would be used for cooking rather than "the fresh, juicy Colchesters for which you have to pay in gold these days". In other words it was automatically assumed that the frozen oysters "from abroad" would in fact be somewhat cheaper than the fresh native oysters and the respondents in this group were able to an extent view the 'raw' and 'cooked' oysters as separate entities rather than as competitive versions of the same thing. Nevertheless, the 'cooked' oysters were still perceived as very much a luxury item, because they would certainly remain expensive in comparison with other foods. On the whole, respondents felt that "importing frozen oysters for cooking purposes" would be a good idea as it would probably allow them to eat oysters a little more frequently than they could at present afford. If however, price were of no importance, or of the cooked (or frozen) oysters were to cost exactly the same "oyster per oyster" as the raw 'native' oysters, respondents stated fairly categorically that they would be unlikely to choose the cooked variety in preference to the raw oysters.

Rather remarkably, no member of, this group, expressed any doubts about the 'world-wide' availability of oysters, (although the 'local' shortage was acknowledged) and, contrary to the views expressed by the London Group, they saw no reason why it should not be possible to import frozen oysters "from somewhere" by the "ship-load".

B.4. REACTIONS TO THE PROPOSED RANGE OF OYSTER-DISHES (CONCEPT).

All respondents in this group were fairly receptive to the idea of the "Breaded" and "Guinness Batter" oysters and thought that they would be eaten in rather the same way as breaded scampi, i.e. as a starter to a meal or possibly as a kind of 'single dish' luncheon, at a restaurant or pub. There were in fact no negative reactions towards these products prior to tasting and there were no mentions of the oyster being 'cheapened' in any way by this method of presentation, as had been the case in the London Group. Overall, the idea of the oyster in "Guinness Batter" was slightly preferred to the "Breaded" version, because this was thought to be potentially

more "exciting/unusual".

The Oyster Dishes on the half-shell were judged to be visually very exciting (photograph) and the initial reactions to the proposed flavour-combinations were entirely positive. However, at this stage respondents were tending to express their attitudes to the sauce-flavours as such, rather than considering them in combination with the oyster itself. On this basis, the 'Spinach and Pernod' mix was chosen as the most interesting, followed by the 'Spiced Tomato'. The 'Mornay' and 'Florentine' versions were thought of as "more usual" but none of the flavour-combinations mentioned produced any adverse reactions in themselves. However, after these initial comments, respondents were beginning to consider what effect these sauces might leave on the oyster-flavour and most thought that apart from perhaps the sauce Mornay, the sauce-flavours would be too "overpowering" to allow the oyster-taste to come through.

"You want something light and very delicate flavoured to enhance the taste of the oyster - not something that would disguise it".

"I like the idea of the Spinach and Pernod combination as Pernod is my favourite drink, but I know from experience that the Pernod taste is very strong and I'm sure it would completely kill the oyster taste".

"On second thoughts I can't really believe that any of these flavours would be suitable for oysters - unless you don't like oysters and then this would be an ideal solution".

However, inspite of these not rather strong reservations all respondents thought they would very likely try any of these dishes if they were included in a Restaurant menu simply to see what "the sauce tasted like" and "whether you could in fact taste the oyster".

Some group members felt that these dishes might be "at least as expensive" as the traditional 'raw' oyster, because the overall

presentation was the same (on the $\frac{1}{2}$ shell) and while the original (frozen) oyster itself might have been a little cheaper than the 'raw' native oyster, this price difference would be counteracted by the cost of the sauce-ingredients and the cooking. If this were the case, a number of respondents (notably the 'dedicated' oyster-eaters) felt that they would always choose the raw oyster on the $\frac{1}{2}$ shell in preference to the cooked variety. On the other hand it was thought likely that a greater number of restaurants (i.e. those not normally serving raw oysters) would probably go in for these cooked dishes and so the question of direct choice would not necessarily arise.

One other advantage of the 'cooked oyster' shells would be that they need not necessarily be served only as 'starters' to a meal (like raw oysters) but might well be suitable for a main course, which would "make an interesting change" and "one would be more prepared to pay a higher price for a main-course than a starter if they did cost as much as the usual oysters".

Reactions to the Oyster Flans were very non-committal and tended to mirror those shown by the 'under 35's' group. Respondents found it difficult to decide at what point during a meal this type of dish might be served or indeed at what type of restaurant. Some thought they might be used for a "lunch-time main course" or would even be a "nice family snack" in the evening. On the whole, the Flans were not perceived as suitable dishes for formal 'dinners' either at a restaurant or in the home.

The Oyster Pies were (conceptually) received rather more favourably than the Flans and there were some very positive reactions (mainly from the men) to the proposed "Steak, Kidney and Oyster" combination. About half the group had heard of, though never eaten, this combination before and they thought this type of dish would be particularly suitable for serving in those restaurants specializing in 'traditional English food' ("very fashionable nowadays"). In fact all the proposed flavours were viewed very favourably and were largely identified as main-course dishes particularly suitable for an evening meal - again for the home as well as the restaurant.

Apart from the 'Plain Oyster Pie', which would probably be fairly expensive, respondents felt that the oysters would probably be mainly used to add 'glamour' to otherwise fairly ordinary dishes and the resulting increase in price (Which would not be too exorbitant, I would have thought") would be worth paying.

Reactions towards the Vol-au-Vents were not very enthusiastic, because they were seen as an essentially rather "cheap" way of serving an expensive sauce-mixture ("masses of pastry with very little of the actual shrimps or chicken or prawn or whatever served in them"). and they were not considered suitable for a dinner (party) either when eating out or at home. However, respondents thought that they would make an unusual single-course luncheon-dish (served with a salad) at a relatively inexpensive restaurant or a pub and they could be very useful for home-use at a "drinks and snacks party":-

"They would be just the kind of thing I'd like to serve at a party; one gets a bit tired of all the usual things and these would be just that bit more interesting".

Again respondents felt that the inclusion of oysters should not make a great deal of difference to the overall price of the Vol-au-Vents, because "you'd probably need only one oyster per case if it was chopped up a bit".

This product was not taste-tested.

B.5. THE TASTING.

a. Raw Oysters.

The Weybridge group were served 'raw' unfrozen oyster-meats in the same way as the London group had been and all but one of the participants tried one or more. The reactions were very similar to those reported on for the London Group, i.e. the oysters were thought to "taste very nice"/"delicious"/"not really different from the fresh one", but the presentation was entirely unacceptable. All respondents thought that the product in itself would be perfectly suitable for serving/eating raw, if they could be served on the $\frac{1}{2}$ shell or even on a dish specially designed for the purpose. If these were possible,

all but one thought they would be happy to order these oysters in a restaurant.

b. Breaded and Battered Oysters.

These two varieties were again served simultaneously, but while the 'under 35's' preferred the oysters in Guinness Batter, (as had this group at the concept stage) the members of this group found the Breaded variety preferable. They felt that the oyster-taste was very much more pronounced in this version compared with those in the Batter, and it must be pointed out that this reaction might well be the more realistic since the judgement of the 'under 35's' in this instance tended to be rather influenced by their initial rejection of the 'Breaded' concept. The Batter itself was thought to be pleasant enough but not compatible with the oysters and its rather dark colour was again commented on. No one thought they could actually taste the Guinness in the batter.

The main attraction of the Breaded oysters was the overall delicate flavour of the product which tended to remind respondents of "really first-class" breaded scampi".

"I suppose I prefer these because they are more like the kind of thing I'm used to and they do taste really delicious. The batter on the others was rather too much and you couldn't taste the oyster - they could have had anything inside them".

"I do prefer these, they have a much better taste and I think they look better too than those dark objects there (battered oysters)".

"The general flavour of these is far superior and they are also nicer to eat - on the others the batter tended to come away separately in your mouth and I found this unpleasant".

All respondents thought they would be "very likely" to order the breaded oysters in a restaurant - none felt they liked the Guinness batter variety sufficiently to do so.

c. Oysters on the $\frac{1}{2}$ shell in various sauces.

The visual impact of the $\frac{1}{2}$ shell dishes when served was great and in general reactions to the taste of the various flavours was also favourable.

The 'Mornay' and 'Florentine' dishes were fairly well liked by most group members (the Mornay version again being preferred) and although the cheese flavour was very noticable this did not altogether obscure the taste of the oysters - some respondents thought the two flavours blended rather well and this dish (Mornay) was particularly well-liked by those who had not eaten oysters prior to the group discussion.

The 'Spinach and Pernod' mix produced fairly strong reactions, both positive and negative and the split was virtually half and half in terms of group members.

Those who favoured this combination found both the visual aspect and the taste of the product unusual and exciting, although most thought that the oyster-flavour was very much obscured by the strong taste of both the spinach and the Pernod. However, in this case this was not seen to be a great draw-back, because respondents felt that the dish as a whole was sufficiently exotic to make eating it a worthwhile experience.

Those who disliked the Spinach and Pernod dish did so largely because of the Spinach, i.e. they did not normally like this food and felt that neither the addition of Pernod, nor indeed the oyster, had done anything to "improve" the Spinach flavour. As they would not normally order any spinach dish in a restaurant, these respondents thought it would be extremely unlikely that they would ask for this product to be served if they saw it on the menu.

Reactions to the 'Spiced Tomato' version of the $\frac{1}{2}$ shell were somewhat non-committal - the taste, while not actually disliked by anyone, was seen to be rather ordinary and not particularly exciting, but most respondents thought the dish was visually attractive, and that the oyster flavour came through fairly well. The general verdict was:-

"Not very exciting but sufficiently interesting to try when eating out".

The overall preference for the $\frac{1}{2}$ shell dishes among this group was:-

Sauce Mornay
Spinach and Pernod
Spiced Tomato

Nine chose the 'Florentine' version.

The housewives were shown a couple of packs of frozen $\frac{1}{2}$ shell dishes and all thought that, provided the price was not too high, they would make a marvellous dish to serve as starters at a special dinner-party at home or even at a 'drinks and snacks' party for special guests. They would be really "out of the ordinary" and the simple preparation (just heating them up) would be an unexpected added bonus.

d. Oyster Flans.

Both the 'Mornay' and the 'Florentine' flans were fairly well liked by all respondents (no-one disliked either product) but they were deemed to be "rather dull"/"nothing really special" and the respondents attitude to these dishes did not change from that found at the concept stage.

They reiterated that these products would make a good single-course luncheon dish but would be particularly suitable for home-use as a family weekend lunch dish, again with the reservation they were not too expensive, or an evening snack. All the housewives present thought they would buy it for that purpose if it were made available and those with a deep-freeze thought it would make an ideal "emergency stand-by" and could be usefully stocked with that purpose in mind.

e. Oyster Pies.

By the time the respondents were invited to try the Oyster Pies, most felt they had already eaten more than enough and would be prepared to only taste "the tiniest morsel" of any of the offered dishes. Reactions were therefore rather cursory, but the moderator feels that the important attitudinal aspects had been covered at the concept-stage.

Of the three dishes tried (Plain Oyster, Mushroom and Steak and Kidney with Oyster) all were more or less well received. The Plain Oyster and Mushroom and Oyster versions did not solicit any very strong reactions - both were equally liked and no one actively disliked either dish.

Compared with the London Group, the Steak and Kidney Pie with Oysters received a much more favourable reaction from this group and this dish was in fact chosen for overall preference, although a few found the kidney flavour to be rather too strong.

All respondents still felt, as had been expressed at the concept stage, that these products would be very acceptable as a main-course on any restaurant menu, either for lunch or for dinner, and that they would also be highly suitable for home consumption (mainly as an evening meal served with green vegetables or a salad).

5. SUMMARY OF CONSUMER GROUPS.

Overall, the attitude towards the concept of cooked oyster dishes varied considerably between the two groups of consumers interviewed, and, to a lesser degree, between those respondents who might be described as committed oyster-eaters and those who were less assertive in this report.

The 'over 40's' group tended to show no negative reactions to the idea of cooked oysters, mainly because they perceived these to be intrinsically different, both in terms of price and to some extent quality, from the traditional fresh oyster on the shell. Therefore no conceptual conflicts arose in this group.

However, the London groups of 'under 35's' were unable to perceive any essential difference (certainly in terms of price) between the oysters used in the cooked dishes and those served raw in the usual manner ("an oyster is an oyster") and the cooked oysters, whatever the form, were judged, both in terms of concept and actual taste, from the 'competitive' point of view rather than on their own merit. The respondents tended therefore to react rather negatively, particularly during the concept stage of discussions. Another factor responsible for their reaction was that some of the proposed ingredient - combinations were found to be conceptually incompatible; ("rich man's food" vs. "poor man's food" - "cheap/ordinary" vs. "expensive/exceptional") and would therefore not be likely to enhance the 'eaters' social status in any way, which was one of the main functions of the raw oyster on the shell.

Those respondents - in both groups - who were rather oyster-orientated tended to generally react very much less favourably to the cooked oyster concept than did the less committed and the non-triers in particular, because for them the

raw oyster on the shell was the 'ultimate' taste-experience and any other version of serving this food could only be viewed in comparison as being very much second-rate. Obversely the 'non-triers' (in terms of total population obviously the highest number) reacted most positively to the cooked oysters, both at the Concept and Tasting stages of the group discussions and this would seem to indicate a point worth developing in any future research (or marketing) strategy.

Of the whole range of oyster-dishes presented, all respondents other than the non-triers expressed an overall preference for the raw 'unfrozen' oyster meats, as these came nearest to the "real thing" and were generally judged to be comparable both in flavour and texture with the usual raw oyster dish. Respondents were of the opinion this product would be well received by the 'eating out' consumer, particularly if they compared favourably in price with the 'fresh' raw oysters, always PROVIDED that an acceptable method of presentation could be devised.

The cooked oyster-dishes on the half shell were the next most favoured products, with the 'Spinach & Pernod', 'Spiced Tomato' and 'Mornay' flavours being the most acceptable. These products were judged suitable for either starting a meal (3 half shells per portion) or as a main course (6 shells per portion) in restaurants - particularly those who did not normally serve raw oysters, or when these were not available.

The Breaded Oysters and those in Guinness Batter were also well liked by the respondents in both groups (the 'Breaded variety being preferred by the older respondents), but most were unable to define exactly where this product might be positioned, both in terms of the type of restaurant (Pubs were mentioned by some respondents in this connection) and also menu-course. Some thought they might make an acceptable alternative to breaded scampi.

The concept of the Oyster Flans and Pies, when aimed at restaurants, tended to be completely rejected by the younger respondents, but more readily accepted by the older group. After the taste-test, both groups of respondents much preferred the Pies to the Flans, in particular the 'Plain Oyster' version. The 'Chicken' and 'Mushroom' Pies with Oysters were also well accepted during the test-trial, but were found to be conceptually rather far removed from what could be described as an 'Oyster' dish, but were viewed instead as being slightly more exotic version of an otherwise very ordinary dish.

The 'Steak, Kidney and Oyster' Pie, both in terms of image and actual flavour, was completely rejected by the younger group, while about half the older respondents reacted extremely favourably.

None of the 'under 35's' group were of the opinion that the Oyster Pies (Flans) would be particularly suitable for sale through restaurants, both in terms of concept ("too ordinary/unexciting") and menu-placing, while the older respondents felt they would be perfectly acceptable as a restaurant 'main course' for either lunch or dinner. Neither group of participants thought the Flan versions of the oyster dishes were particularly appropriate for restaurant sale, but both groups perceived these and the oyster pies as being ideal for home-consumption, and should therefore be aimed at the Supermarket/Housewife.

6. THE CATERING TRADE.

Due to the exceptionally large number (16) of respondents attending this group discussion, this part of the report is confined to detailing only the moderator's overall impressions of the group's reactions to the initial concept of the range of oyster-dishes proposed and the taste-test itself.

It is impossible to exercise sufficient control over a group consisting of more than 8 to 10 participants to allow any assessment in depth of the underlying motivational forces, since these tend to be somewhat over-shadowed by other inter-group reactions at play.

As far as this catering group in particular is concerned the rather negative reactions especially at the concept stage of the discussion are due largely, it is felt, to the competitive elements introduced by the more forceful members of rival establishments and also the 'pressure' applied by those working in or managing restaurants at the top-end of the scale on those connected with 'lesser' eating establishments.

6.1. Pre-tasting - General.

The moderator feels that the main reason for attending the discussion had been essentially the respondents' curiosity in finding out whether any knowledge could be gained from either the competitors or the presenters of the group which could be usefully applied in their own restaurants. Most said they had come "to see what it was like" or "to be friendly".

Only two of the restaurants represented served oysters (raw on the shell)

regularly ("I buy 100 a day"), none of the others ever served this food in any form. Most had scampi, scallops, prawn or other shell-fish dishes on their menu and about a third 'occasionally' served mussels. All provided other types of fish for main-courses (salmon, sole etc.,)

Respondents thought that on the whole about 50% or more of their customers ordered fish-dishes as a start to the meal - 25% or less would order fish as a main course.

The raw oyster on the shell was seen to be a very 'up-market' dish, in which most respondents felt their clientele would not be interested, mainly because of the exorbitant price.

The respondents ranged in age from about 25 to between 50-60 years, and three of the younger members had in fact never tasted oysters.

6.2. Frozen vs. Fresh Oysters/Cooked vs. Raw Oysters.

All group-members were familiar with using frozen foods (all those considering themselves as belonging to very up-market establishments said they generally tried to use fresh products and would "resort" to frozen foods only if absolutely unavoidable), among them all types of fish, including shell-fish (scampi, lobster, scallops). Their overall reactions to the idea of frozen oysters tended therefore to be fairly favourable, with some doubts mentioned concerning flavour impairment, and more importantly, lasting-quality (in terms of 'safety for use') once the product was unfrozen:-

"An oyster basically retains the flavour of the salt-water in which it is frozen. I would assume that this would disappear during the unfreezing process and leave you with a basically tasteless object".

"How long would they (the oysters) last once they are unfrozen. It is possible to keep most things until the following day if they are not used up on the day of de-freezing, but not possible to re-freeze food once you've unfrozen it and I just wonder how safe it would be to keep oysters unfrozen for 24 hours or so".

None of the group members thought it would be possible to serve the unfrozen oyster-meats 'raw' whether the shells were available or not; most felt that the quality of the oyster-meats would probably not be high enough for this purpose - quite apart from the fact that they felt there would be no demand for such a product.

Apart from the reservations mentioned earlier, respondents on the whole (particularly the cooking staff) saw no reason not to use the (un)frozen oyster meats in cooked dishes (preferably of their own invention), provided the cost was acceptable. One respondent stated that frozen oysters are at present available to the catering trade at a price of 1p per oyster meat. Most respondents did not seem aware of this and were indeed rather surprised.

There were no obvious negative reactions from any group member of the idea of using cooked oysters. Even from those representing the restaurants at which raw oysters were being served; the oysters to be used in cooking were perceived as different, both in terms of cost and quality, from the fresh raw oyster.

6.3. Reaction to the Proposed Range of Oyster Dishes.

Reactions to some of the proposed range of oyster-dishes tended to be either non-committal or negative because respondents felt that either the type of dish itself would not be appropriate for their type of restaurant or the flavour mixes were deemed unsuitable.

The idea of the 'Breaded and Guinness Batter' oysters was greeted with a general lack of enthusiasm, because the group members felt that there would be no demand for such a dish among their clientele. Of the two, the 'Breaded' variety was thought potentially slightly preferable provided the 'breeding' was of good quality.

Reactions to the oyster-shell-dishes overall were again very much influenced by the attitude of the 'oyster-serving' members of the groups, who felt that this would be an entirely unsuitable type of oyster-dish as far as their own trade was concerned because they had their reputation of serving only top-quality oysters to protect and these dishes were bound not to fall into that category. Some other participants thought the half-shell dishes would probably be perfectly acceptable to their patrons, but were unwilling to pursue or develop

this line of thought in view of the rather strong attitudes expressed by their colleagues.

The concept of the Oyster-Flans was not accepted very favourably by any group members, again for the reason that they could see no demand for it from their customers, except possibly as a lunch-time snack in the Pub trade.

Reactions to the proposed Oyster Pies were the most favourable of the whole range, particularly towards the Steak & Kidney version, because of its traditional image, of which most respondents were aware and about half the group could envisage such a dish in their restaurant.

6.4. The Tasting.

a. Raw (unfrozen) Oysters.

Respondents were again served raw unfrozen oysters in the manner described for the other two groups and all but one tasted the oyster meats. The initial reactions were very favourable, in as much as respondents found them to be better, both in taste and texture than they had expected, although of not of quite such high quality as a fresh oyster on the shell. Most said they would have no objections to using these in a cooked dish - again provided the price was right (none were willing to state what they considered the 'right' price should be). Then the respondents began to be somewhat negatively influenced by a particularly assertive 'oyster-connoisseur' (owner of oyster-serving restaurant) who stated that:-

"This is of course absolutely nothing like an oyster.

It has no taste whatsoever - it's just completely flat and dead You might as well use anything else" (in terms of suitability or otherwise for cooking purposes).... "it would be better than this and cheaper".

As the other 'less experienced' group members were now rather shame-faced about their initially favourable reactions, the moderator felt little could be gained by continued probing.

b. "Breaded" and "Guinness Batter" Oysters.

Overall, reactions to the "Breaded" oysters and this in the "Guinness

Batter" were rather non-committal, with a slight preference expressed for the "Breaded" variety. The fish-taste of the oysters was thought to be more evident in this product, while the batter tended to obscure both the taste and the texture of the oyster ("it could have been fish-row or anything"/"all I could taste was the batter - perhaps mine didn't have an oyster in it") although the batter itself was judged to be "very nice".

None of the respondents could envisage serving either product in their restaurant; one of the 'Pub' members thought he might use something like the breaded variety in his snack-bar, provided the price was acceptable - he thought that if the cost per unit to him was 5p for instance, he would have to sell at 15p per unit and that, on the basis of 10 oysters per portion, the price of £1.50 would not be acceptable to his patrons. Although not appropriate for their own establishments, several other group participants felt that the breaded oysters would be suitable for Pub sales.

Some group members mentioned that both the breaded, and to a lesser extent the 'battered' oysters might be usefully made available to the housewife to use as a starter to a dinner served at home.

c. Oysters on the $\frac{1}{2}$ shell in various sauces.

The overall reactions from the more assertively 'knowledgeable' group members were rather negative in terms of the products' suitability for restaurant use and most of the other group members followed the 'lead' given. Their objections were largely concerned with the quality of the sauces themselves, i.e. some inferred that they might have done rather better if they had produced the sauces, but their concern was mainly with the inappropriate flavours of the sauces in combination with oysters - i.e. the oyster taste had been completely lost and the only 'reminder' of the oyster connection was the shell. It was generally felt that the best way of making use of the basic concept of such a dish would be to serve the oysters in a very delicately flavoured white-wine sauce with the possible addition of some chopped mushrooms to add variety. None thought they would serve any of the half-shell dishes tasted in their restaurant.

However, after these initially rather negative reactions, all members of the group declared that nevertheless they liked the dishes very much (the tomato version being particularly favoured) and thought they would be delighted if their wives were to serve these at home, either as a starter to a meal, or a snack-meal in itself or particularly "to impress" guests at a larger party.

"This is definitely a product for the housewife - I would be very happy to be served these at home and I'm sure my wife would buy these a lot if they were in the shops".

"I would get my wife to get a selection of all these for one of our big parties - I think they would be a smash hit".

The particular advantages were seen to lie in the dishes being "out of the ordinary" and in the simplicity of preparation.

d. Oyster Flan and Pies.

These dishes were served simultaneously as some respondents were wishing to leave in order to prepare their restaurants for the evening opening.

The flans were universally rejected as being too much like "cheese flans - you wouldn't have known there were any oysters in it"/"could have cockles or prawns in them - you couldn't tell it was oyster". None thought these were in the least acceptable for their restaurants, but a member thought the Flans might well be suitable for home use as a family snack.

The reactions to the Oyster Pies were much more favourable, all versions tried were well liked (Plain Oyster, Mushroom, Steak and Kidney) because the pastry was judged to be excellent and the flavours too were generally praised.

Steak and Kidney and Oyster Pie lived up to it's expectation (concept-stage) on the whole, although these respondents too thought that the kidney flavour was too strong in relation to the oysters - if really top quality fresh oysters had been used instead of the frozen ones, this might not have mattered, but it was suggested that the kidneys should be well washed before being included in a dish made with the less flavoursome frozen oysters.

About a third of the respondents present thought they might be prepared to include an 'Oyster Pie' (probably the Steak and Kidney version) on their menus, the remainder felt their customers would not accept these dishes. It was again suggested that these products might be suitable for the Pub trade (lunches in particular) or for home consumption.

6.5. Summary of views from the Catering Trade.

On the whole, the members of the catering trade attending this group discussion expressed the view that the cooked oyster-dishes presented to them had very little appeal in terms of usage in their restaurants, with the possible exception of the "Breaded Oysters" and the "Oyster Pies" - the Steak and Kidney version in particular. The oyster dishes on the half-shell might be more acceptable if more suitably flavoured sauces were used (such as a very delicate white-wine sauce).

All felt that there would be a place for a cooked oyster-dish in their food-range, but on the whole they would prefer to prepare their own dishes (oyster pudding for instance) rather than make use of a ready-made product of the type presented at the test, although this would to a large extent depend on the availability of staff and the cost-comparison of making their own dishes with the frozen oyster meats vs. buying the ready-made product.

The cost of the oyster-meats would in fact be the major factor in deciding the respondents' use of the oysters - whatever the form.

All group participants spontaneously favoured the idea of the whole range of the oyster products being made available to the housewife through the supermarkets, not only because they would like to be served these dishes in their own homes, but also because it would tend to some extent to 'popularise' the oyster which in turn would have the effect of more oyster-dishes being served in restaurants (such as their own) since the restaurateur would no longer have to aim to please only the oyster-connoisseur, which meant using only top quality oysters.

7. CONCLUSIONS:-

From the consumers point of view the oyster-dishes on the half shell were the most preferred of the complete range presented (for being served in restaurants) while the catering-trade represented at the group discussion tended to reject this concept and very much favoured the idea of these products being made available for domestic use. It is felt by the moderator that while this attitude is probably genuine among those representing the very upmarket establishments which normally serve fresh oysters on the half-shell (particularly as this view was shared by the consumers), the respondents representing the 'lesser' upmarket restaurants might well be prepared to include these dishes on their menu's and it might be advisable to further investigate this point through the medium of individual depth interviews after detailed costings have been provided by the client.

The Breaded Oysters were also well accepted by both the 'over 40's' group and the catering-trade (whose clientele consisted largely of the type of respondents taking part in the 'over 40's group), and so were the Oyster Pies (Steak and Kidney flavour in particular), but these two oyster-dishes tended to be dismissed by the younger London Group both in terms of taste and image, for use in restaurants, but some thought the dishes might be suitable for sale in Pubs.

The rejection of the Oyster Flans (and the concept of Oyster Vol-au-Vents) was almost universal when viewed as a restaurant dish, but all group participants were of the opinion that both these and the Oyster Pies would be ideal dishes to aim at the housewife through the supermarket.