CHEESE : A CONSUMER SURVEY OF CHRISTCHURCH HOUSEHOLDS

BY

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PREFACE

This study is the fourth in a series of AERU Research Reports presenting results of Consumer Surveys for various agricultural and horticultural products. In this study cheese is the product under investigation and Christchurch was the location for the survey.

The objective of the present research was to present information on consumer purchasing and consumption patterns and factors affecting these patterns. The results presented are particularly timely, as the industry faces the problem of development of a marketing strategy for the 1980's which will build on the success of the 1970's.

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SUMMARY

An interview survey was conducted among 430 randomly selected Christchurch households during late April 1979. The objective of the study was to obtain information about cheese purchasing and consumption patterns and factors affecting these patterns. The survey results can be summarised as follows.

Purchase of Cheese

Buying cheese. For the majority of households the wife decided the types of cheese to buy and also bought the cheese.

Types bought. Ninety-six percent of the households bought cheddar regularly; 52 percent bought processed cheese; 21 percent specialty cheese and 35 percent cottage or cream cheese.

Outlet used. The majority of the households bought their cheese at the supermarket. There was a tendency for households in the older age group to use the grocer as well as the supermarket.

Cheddar. Similar proportions of households bought mild and tasty with mild being more popular in households with children. Most households bought cheddar either once a week or once a fortnight with the size of block bought being related to the number of occupants in the household.

Reasons influencing choice of brand. "Taste" was seen to be the most important influence when choosing cheddar followed by "texture". These were followed by "on special", "the brand", "price per kilo" and "bigger block" in that order.

Brand loyalty. Fifty-two percent of the households always or nearly always bought the same brand of cheddar.

Brand knowledge. Thirty-six percent of the households had an unprompted recall of 3 or more brand names of cheddar. Eighty-five percent could recall at least one.

Processed cheeses. A greater proportion of households with children bought processed cheese, with plain being more popular than the flavoured or smoked varieties.

Specialty cheese. Blue vein was the most popular with 12 percent buying it in the last month. Apart from parmesan none of the other cheeses were bought regularly by more than 5 percent of households. Blue vein, parmesan, gruyere and camembert were the cheeses most likely to be bought in the future.

Expenditure on cheese. The average expenditure on cheese per capita was 68¢ per week, with 90 percent of the households having a per capita figure between 25¢ and $1.25. The average for cheddar was 48¢. Per capita expenditure was higher for households without children and/or 1-2 occupants.

Changes. Over half the households said they were eating more cheddar than 2 years ago, while only 16 percent said they would buy more in the future. The main reason given for eating more in the future was that the children would get older. Sixteen percent of the households said they were buying more processed cheese, 6 percent more specialty and 20 percent more cottage or cream.

Consumption of Cheese

Cheese as a snack. The most popular way to have cheese as a snack was by itself. Other ways in order of importance were; with biscuits, with bread and toasted and grilled.

Times of day. The majority of households had cheese with lunch, smaller proportions having it with dinner or breakfast. For non-meal times the most popular occasions were supper and afternoon tea, followed by morning tea and pre-dinner snacks.

Use of cheese in preparation of meals. The most frequent uses were cheese in salads and grating and sprinkling it as a garnish. This was followed by cheese sauce, with eggs, cooked with vegetables, in pizzas, in baking and in a fish dish in that order. There was a lower level of cheese use in the retired and older age group.

Cut lunches. The majority of those taking cut lunches had cheese at least twice a week either on its own or with sandwiches.

Substitutes. Cold meat or sausage and savoury sandwich spreads were seen as close substitutes for cheese snacks or in cut lunches. These were followed by fresh fruit and tomatoes, celery and lettuce.

Attitudes Towards Cheese

Meat and eggs as substitutes. Just over half of the households agreed that cheese was a substitute for meat and/or eggs.

Cheese and dinner. In general there was a favourable attitude to having cheese with dinner with 62 percent agreeing cheese was a substitute for pudding and 69 percent agreeing a cheese board completes a satisfying dinner. There was a lower level of agreement in the tradesmen labourer occupational group and younger age group.

Value for money. The majority of households agreed that compared with other things today cheese was good value for money with highest level of agreement in the retired older age group.

Health value. Just over half the respondents disagreed with the statement that too much cheese was bad for one's health, with only 29 percent agreeing.

Promotion of Cheese

Information sources. The majority of households recalled TV advertising for cheese. Other information sources in order of importance were; in store displays, magazines, radio, newspapers and TV programmes.

Recall of TV advertising. Recall for TV advertising was dominated by mention of Bruce Forsythe. This was followed by "bigger block" and "family block".

The family block stickers. Thirty-six percent of the households recognised both the new and old family block stickers; 44 percent the old label only and 5 percent the new label only. Only twenty-six percent correctly said a block of cheddar had to be 900 gms before it could have the sticker.

CHAPTER 1

INTRODUCTION

1.1 Purpose of the Study

Since the 1960's there has been a steady increase in the per capita consumption of cheese in New Zealand. However, since 1975 the increase has been more rapid.

TABLE 1

Estimated Annual Consumption of Cheese in New Zealand

Year (ending 31 May)	Per Capita Consumption (kilos)	Total Consumption (1,000 tonnes)
1965-66	3.2	8.5
66-67	3.3	8.8
67-68	3.6	9.7
68-69	4.0	11.0
69-70	4.1	11.4
70-71	4.3	12.0
71-72	4.4	12.4
72-73	4.4	12.9
73-74	4.8	14.5
74-75	5.0	15.3
75-76	5.0	15.8
76-77	6.5	20.1
77-78	7.1	22.5
78-79	8.3	26.1

Note: Does not include soft cheeses (e.g. cottage and cream cheese)

Source: Monthly Abstract of Statistics, Dept of Statistics and personal communication with N.Z. Dairy Board.

The 1978-79 New Zealand per capita figure of 8.3 kg is of a similar order to per capita figures of Australia, Canada, United Kingdom and the United States of America, but still less than most Western European countries (see Appendix 5).

Since November 1971 the New Zealand Dairy Board has given promotional support for cheese on the domestic market and since mid 1976 this support was intensified. This enabled the Dairy Board to launch a generic promotional campaign comparable to campaigns for many branded consumer products; the campaign was associated with a marked increase in the per capita consumption of cheese. The campaign's theme of "buy a bigger block" aimed at increasing the size of the block of cheddar bought by housewives in the regular purchases of groceries.

The industry now faces the problem of developing a marketing strategy for the 1980's which can build on the success of the late 1970's. An essential element of developing such a strategy is the detailed analysis of the market and it's environment.

Although the industry has information about production and distribution, and since 1975 detailed information about retail sales,[1] it has little formal information about consumer buying and consumption patterns and consumer attitudes. Such information could help identify the demand potential for product varieties (i.e. cheddar, processed and specialty cheese) in the different market segments and help assess the impact of changes in the market environment on buying consumption and attitudes. Recent changes in the environment include:

- an increase in the marketing effort for all brands of cheese by individual companies. This has included packaging improvements, media advertising and point of sale promotion.

- changes in the relative prices of substitutes for cheese (see Appendix 6).

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[1]Supplied by Nielsen Data Service.

- the tendency for households to buy their groceries once a week at the supermarket.
- changes in consumer eating habits with an increase in the popularity of takeaway meals and convenience foods.
- an increase in the popularity of "health", "natural" and vegetarian foods.
- a decline in the population with low projected rates of increase[2].
- changes in household composition with an increase in the proportion of households with one or two occupants (see Appendix 6).
- a lower average weekly wage in "real" terms since the early 1970's[3].

Thus, with the agreement of the New Zealand Dairy Board, the Agricultural Economics and Marketing Department at Lincoln College carried out a consumer survey with the objective to personally interview a random sample of 400 Christchurch households in order to examine:

1. household purchasing and consumption patterns
2. factors affecting these purchasing and consumption patterns.

1.2 Research Procedure

The sample. The sample was defined as households in the Christchurch urban area. The planned sample of 430 households was drawn as follows.

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[2]For the latest estimates of population growth see the Monthly Abstracts of Statistics, Dept of Statistics, July, 1979, p.3, Table 1 and p.4, Table 3.

[3]For the latest estimates see the Monthly Abstracts of Statistics Dept of Statistics, July, 1979, Table 118, p.85.

1. Christchurch was divided into 58 suburbs[4]

2. Forty of these suburbs were randomly selected from five strata[5]

3. From each suburb an address was randomly selected to act as a starting point for 10 or 12 interviews (every second dwelling in either direction was interviewed).

Geographical details of the achieved sample are in Appendix 2.

The questionnaire. The final format of the questionnaire was determined after pilot testing and redrafting. It was divided into 13 sections with questions designed to obtain the following information:

Section 1 - Buying: whether household eats cheese, who decides and who buys, where it is bought.

Section 2 - Buying cheddar and colby: how often mild, medium and tasty cheddar and colby are bought, size of blocks, awareness of family block labels, knowledge of labels, amount spent, changes in quantity bought.

Section 3 - Choice of cheddar: brand recall, reasons influencing choice of which block, brand loyalty.

Section 4 - Buying other types of cheese: frequency of buying processed, specialty and cottage and cream cheeses, amount spent, changes in types bought, whether bought imported cheese, whether prepared to try sheep or goats milk cheese.

Section 5 - Cut lunches: households taking cut lunches, who prepares, frequency of eating cheese, ways cheese is served, substitutes for cheese.

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[4]The suburbs were listed in the Wises Post Office Directory (Volume 3, 1977).

[5]The authors' knowledge of the socio-economic status of the suburbs was used to group the suburbs into five strata. The number of suburbs drawn from each strata was proportional to the number in the population.

Section 6 - Consumption at home: frequency of having with biscuits, bread, toasted and grilled, by itself, meals and snacks with cheese, who eats snacks, substitutes.

Section 7 - Cheese in preparation of meals and baking: frequency of use, who prepares.

Section 8 - Storage: how and where.

Section 9 - Attitudes towards cheese.

Section 10 - Takeaway meals and meals without meat or fish.

Section 11 - Reasons for not eating cheese.

Section 12 - Promotion: media recall, knowledge of TV advertising, hours of TV watched.

Section 13 - Household characteristics.

A copy of the questionnaire is included as Appendix 1.

The interviews. The interviews were carried out during the last week of April with the majority on Saturday morning or early afternoon. The team of interviewers was made up of 39 senior students and 2 staff members. The senior students obtained prior interviewing experience through pilot testing and a training session. The interviews were checked with telephone callbacks.

The analysis. The data were coded and edited for computer analysis. Responses were tabulated and estimates were derived for expenditure on cheese. The analysis involved examining the marginal frequencies for the variables (i.e. questions) and relationships between variables. Chi square tests were used to examine whether there were statistically significant relationships between the variables[6].

1.3 Characteristics of the Sample

In order to examine whether the achieved sample was representative of the population from which it was drawn, socio economic characteristics were compared between sample and census data.

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[6]The 90 percent confidence level was used to test the various hypotheses about relationships between variables.

The sample figures were similar to the national figures except for a slightly larger proportion of households in the clerical, sales, service group and a smaller proportion in the tradesmen labourer group. There was also a slightly larger proportion of households with 4 or less occupants (Table 2).

TABLE 2

Sample Characteristics

Household Characteristics	Survey Sample %	New Zealand Census[a] (excl. agric. workers) %
(i) Occupation of Head of Household		
Professional and Managerial	18.6	15.4
Clerical, Sales and Service	26.8	21.3
Tradesmen and Labourer	27.3	33.9
Retired and Other	27.3	29.4
	100.0	100.0
Valid Responses[b] 425		
(ii) Age of Head of Household[c]		
Less than 25 years	9.5	7.2
25-34 years	22.4	23.9
35-44 years	17.8	18.3
45-54 years	16.2	18.7
55-64 years	18.5	15.6
Older than 64 years	15.5	16.3
	100.0	100.0
Valid Responses 420		
(iii) Household Composition		
1-2 occupants	45.1	44.1
3-4 occupants	37.8	34.3
More than 4	17.1	21.6
	100.0	100.0
Valid Responses 426		

a Source: 1976 N.Z. Census of Population and Dwellings, except for Age which was based on the N.Z. Household Survey Report, Dept of Statistics. 1976-77.

b Invalid responses occurred when the respondent did not provide an answer to the question or when the response was recorded incorrectly.

c Age of person who usually buys the groceries was taken as equivalent to the age of the head of household.

CHAPTER 2

HOUSEHOLD PURCHASING PATTERNS

2.1 Buying Cheese

Households eating cheese. Of the 430 households interviewed 419 (97.4 percent) used cheese[7].

Who decides and who buys. In the majority of households the wife decided what types of cheese to buy and also bought the cheese (Table 3).

TABLE 3

Who Decides What Types of Cheese to Buy and Who Buys

	Person Who Decides	Person Who Buys
	%	%
Wife	60.0	67.4
Husband	6.7	6.7
Wife and Husband	12.9	10.6
Parents or Children	5.8	1.4
Single Male or Female	13.4	12.7
Other	1.2	1.2
	100.0	100.0
Valid Responses	417	417

Types bought. Ninety-six percent of the households had bought cheddar in the last month; 52 percent processed; 21 percent specialty and 35 percent cottage and cream[8]. Thirty-one percent had bought cheddar exclusively in the last month (Table 4).

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[7] For the remainder of the report households that served cheese will be referred to as "the households".

[8] See Appendix 3 for classification of processed and specialty cheeses.

TABLE 4

Types of Cheese Bought

(i) Frequency of Buying	Cheddar	Processed	Specialty	Cottage/Cream
	%	%	%	%
Last month	95.7	52.0	21.0	34.8
Last 6 months	2.2	18.9	13.8	22.2
Last 2 years	1.0	6.4	6.7	6.2
Longer or never	1.1	22.7	58.5	36.8
	100.0	100.0	100.0	100.0

(ii) Types Bought in Last Month	%
Cheddar only	30.8
Cheddar and:-	
Processed, Specialty, Cottage and Cream	20.8
Specialty, and Cottage and Cream	4.8
Processed and Specialty	5.7
Processed and Cottage and Cream	0.0
Processed	25.5
Specialty	3.1
Cottage and Cream	9.3
	100.0
Valid Responses 419	

Outlet Used. Eighty-six percent of the households had bought cheese at a supermarket; 16 percent at a grocer, 9 percent at a dairy; 4 percent at a delicatessen; 5 percent at a wholesaler and 11 percent at a cheese factory[9]. Apart from a larger proportion of older people buying at a grocer and the middle age group at a cheese factory there was little difference in buying patterns for the age and occupation characteristics (See Appendix 8 , Table 43).

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[9] The percentages do not add to 100 percent because some households had used more than one outlet.

2.2 Cheddar and Colby Purchases

Types bought. Similar proportions of households bought mild and tasty cheddar in the last month with only small proportions buying medium cheddar and colby (Table 5).

TABLE 5

Types of Cheddar and Colby Bought

Bought in last	Mild Cheddar	Medium Cheddar	Tasty Cheddar	Colby
	%	%	%	%
Months	49.6	18.9	46.5	15.8
6 Months	6.9	8.6	6.7	10.0
2 Years	2.9	3.3	4.1	3.6
Longer or never	40.6	69.2	42.7	70.6
	100.0	100.0	100.0	100.0
Valid Responses 419.				

A greater proportion of households with children bought mild and medium cheddar and colby (Table 6). However, there were no clear differences for the occupational and age groups except for a tendency for the retired and older age group to buy tasty (see Appendix 8, Table 44).

TABLE 6

Types of Cheddar Bought by Whether Household Has Children

Bought in Last Month	No Children	Children
	%	%
Mild	43.7	58.1
Medium	16.7	21.7
Tasty	52.3	39.7
Colby	13.4	19.0
Valid Responses	239	179

Frequency of buying. The majority of households bought cheddar once a week or every two weeks (Table 7).

TABLE 7

Frequency of Buying Cheddar and Colby

Frequency	%
More than once/week	4.1
Once/week	46.2
2 Weeks	30.0
3 Weeks - 1 month	16.1
Longer	3.6
	100.0
Valid Responses 416	

There was a tendency for larger households to shop more frequently (Table 8).

TABLE 8

Frequency of Buying by Household Size

Frequency	1-2 Occupants	3-4 Occupants	Over 4 Occupants
	%	%	%
Once a week or more	31.7	59.4	75.3
2 weeks	36.7	28.1	17.8
Longer	31.7	12.5	6.8
	100.0	100.0	100.0
Valid Responses 413			

Sizes bought. The majority of households with 3 or more occupants usually bought 600 g - 1 kilo blocks, while for households with 1-2 occupants there was a tendency to buy smaller sizes. Only a small number of households bought blocks over 1 kilo (Table 9).

TABLE 9

Size of Block Bought by Household Size

Size	1-2 Occupants	3-4 Occupants	5 or more Occupants	All Households
	%	%	%	%
2-300 gms	26.4	7.6	1.4	14.7
4-500 gms	17.8	12.7	11.1	14.5
6-800 gms	26.3	33.5	31.0	30.4
900 gms - 1 kilo	17.8	41.8	52.8	32.8
1½ - 2 kilos	2.2	1.3	1.4	1.7
≥ 2 kilos	5.6	3.8	4.2	4.6
Valid Responses	180	158	72	412

The 600 gm - 1 kilo blocks were more popular with households in the professional, managerial and clerical, sales and service occupational groups and middle and younger age groups (see Appendix 8 Table 45).[10] Also greater numbers of "medium" and "heavy" cheddar users bought these sizes (Table 10).

TABLE 10

Size of Block Bought by Quantity of Cheddar Bought

Size	"Rare"	"Light"	"Medium"	"Heavy"
	%	%	%	%
2-300 gms	33.3	18.9	9.5	6.6
4-500 gms	30.0	14.3	13.3	11.7
6-800 gms	20.0	32.0	29.8	36.1
900 gms - 1 kilo	13.3	29.5	41.9	29.5
1½ - 2 kilos	0.0	0.7	0.6	6.6
≥ 2 kilos	3.3	4.0	3.7	8.2
Valid Responses	30	149	161	62

Notes: (i) Rare User 1-19c per capita expenditure on cheddar per week
Light " 20-39c " " " " " " "
Medium" 40-69c " " " " " " "
Heavy " over 69c" " " " " " "

(ii) The percentages do not add to 100 percent because households may buy more than one size.

[10] It was necessary to control for number of occupants in the household to test these hypotheses.

2.3 Choosing Cheddar

Reasons influencing choice. Respondents were read a list of reasons that might influence their choice of which block of cheddar they would buy. At the same time they were handed a 7 point scale and asked to indicate the importance of the reasons. The scale was:

Very Important	Quite Important	Slightly Important	Neither	Slightly Un-important	Quite Un-important	Completely Un-important
1	2	3	4	5	6	7

A comparison of the frequency of responses indicated that "taste" was clearly seen to be the most important reason with the majority of respondents regarding it to be "very" or"quite" important. "Texture" was seen to be the next most important reason followed by "on special", "the brand", "price per kilo" and "bigger block" in that order[11] (Table 11).

Except for larger proportions of the retired occupational group and older age group regarding "bigger block" as unimportant there was little difference in the responses for the different age and occupational groups. (see Appendix 8, Table 46). However, there was a higher level of agreement for all of the attributes among the "medium" and "heavy" users of cheddar (see Appendix 8, Table 47).

[11] Not all the brands of cheddar displayed the "family block" sticker at the time of the survey.

TABLE 11

Reasons Influencing Choice of Block of Cheddar

(i) Absolute Percentages	"Taste"	"Texture"	"On Special"	"The Brand"	"Price Per Kilo"	"Bigger Block"
	%	%	%	%	%	
1. Very Important	47.8	21.9	28.4	16.9	17.1	11.9
2. Quite Important	39.6	41.3	27.3	24.0	27.0	27.8
3. Slightly Important	6.2	12.0	14.4	19.7	14.6	15.9
4. Neither Important nor Unimportant	2.7	8.2	6.8	9.8	9.3	8.8
5. Slightly Unimportant	0.7	3.8	6.6	8.6	9.1	8.8
6. Quite Unimportant	1.5	6.6	8.1	11.6	12.3	13.4
7. Completely Unimportant	1.5	6.1	8.4	9.3	10.6	13.4
	100.0	100.0	100.0	100.0	100.0	100.0
(ii) Cumulative Percentages						
1. Very Important	47.8	21.9	28.4	16.9	17.1	11.9
2. Quite Important	87.3	63.3	55.7	40.9	44.1	39.6
3. Slightly Important	93.5	75.3	70.1	60.6	58.7	55.6
4. Neither Important nor Unimportant	96.3	83.4	77.0	70.5	68.0	64.4
5. Slightly Unimportant	97.0	87.2	83.5	79.0	77.1	73.2
6. Quite Unimportant	98.5	93.9	91.6	90.7	89.4	86.6
7. Completely Unimportant	100.0	100.0	100.0	100.0	100.0	100.0
Valid Responses	396					

Other reasons influencing choice. Respondents were then asked if there was anything else they thought that was important when choosing a block of cheddar. Twenty-four percent of respondents gave additional reasons (Table 12).

TABLE 12

Other Reasons Influencing Choice of Block

Reason	%
"Looks Fresh"	24.0
"Packaging"	16.0
"Brands Keeping Quality"	13.0
"Consistency in Quality"	9.0
"Greater Availability"	6.0
"Colour"	5.0
"Cutting Quality"	5.0
"Other Reasons"	22.0
	100.0
Valid Responses 100	

Brand loyalty. Twenty-eight percent of the respondents indicated they always bought the same brand of cheddar; 24 percent nearly always (2 out of 3 times), 13 percent sometimes, and 35 percent never. Brand loyalty did not vary with any of the household characteristics (i.e. occupation, age, number of occupants), although there was a higher level of loyalty for "medium" and "heavy" users of cheddar (Table 13).

TABLE 13

Brand Loyalty by Quantity of Cheddar Consumed

	Rare User	Light User	Medium User	Heavy User
	%	%	%	%
Loyal	54.8	63.9	65.6	69.5
Not Loyal	45.2	36.1	34.4	30.5
	100.0	100.0	100.0	100.0
Valid Responses	31	147	163	59

Note: Loyal Users "Always", "Nearly Always" or "Sometimes" bought the same brand.

Brand knowledge. Eighty-five percent of the respondents recalled at least one brand of cheddar correctly without prompting, with 36 percent recalling 3 or more brands. After prompting[12] 97 percent of the households recalled at least one brand and seventy-seven percent 3 or more (Table 14).

TABLE 14

Recall of Brand Names for Cheddar

Number of Brands Recalled	Unprompted	Total Prompted and Unprompted
	%	%
0	15.0	2.9
1	21.5	4.5
2	27.4	9.3
3	18.4	6.0
4-5	12.9	16.7
6-7	2.4	17.2
8-9	2.4	34.1
10 or more	0.0	19.4
	100.0	100.0
Valid Responses	419	

Note: See Appendix 8 Table 48 for recall of individual brands.

The average number of brands recalled unprompted[13] was highest for the professional, managerial and clerical, sales and service occupational groups and the younger and middle age groups (Table 15).

[12] These results are similar to brand recall for wine; eightysix percent of wine drinkers recall at least one brand and thirtytwo percent three or more. See "Wine : A Consumer Survey of Christchurch Households". AERU Research Report No 79, September, 1977, p. 33.

[13] Prompted recall is when the interviewer read out the brand names which had not been given.

TABLE 15

Average Number of Brands Recalled
by Occupation and Age of Head of Household

(i) Occupation	Professional and Managerial	Clerical Sales and Service	Tradesmen and Labourer	Retired	Other
Unprompted Recall	2.5	2.6	2.1	1.9	1.8
Total Recall	6.6	6.8	6.5	5.8	5.9
Valid Responses	79	112	116	90	18
(ii) Age	**Under 25 Yrs**	**25-34 Yrs**	**35-49 Yrs**	**50-64 Yrs**	**Over 64 Yrs**
Unprompted Recall	2.4	2.4	2.1	2.4	1.6
Total Recall	6.3	6.8	6.7	6.3	5.5
Valid Responses	40	94	106	110	60

2.4 Other Types of Cheese

Processed cheese. Thirty percent of the households had bought plain processed cheese in the last month; 16 percent had bought smoked and 23 percent flavoured (Table 16).

TABLE 16

Types and Frequency of Buying Processed Cheese

Frequency of Buying	Plain	Smoked	Flavoured
	%	%	%
Last month	29.8	16.2	22.7
Last 6 months	14.3	16.7	15.8
Last 2 years	7.6	6.2	9.5
Longer or never	48.2	60.9	52.0
	100.0	100.0	100.0
Valid Responses 419			

Specialty cheeses. Blue vein was the most popular of the specialty cheeses with 12 percent of households buying it in the last month. Apart from parmesan none of the other specialty cheeses were bought regularly by more than 5 percent of the households (Table 17).

TABLE 17

Types and Frequency of Buying Specialty Cheese

Frequency of Buying	Blue Vein	Camembert	Cheshire	Danbo	Edam	Erbo
	%	%	%	%	%	%
Last month	12.2	1.9	1.4	1.4	1.2	1.2
Last 6 months	8.4	2.9	0.7	2.9	1.9	1.2
Last 2 years	6.4	3.1	1.7	2.1	1.2	1.7
Longer or never	73.0	92.1	96.2	93.6	95.7	95.9
	100.0	100.0	100.0	100.0	100.0	100.0

Frequency of Buying	Fetta	Gouda	Gruyere	Havarti	Parmesan	Romano
	%	%	%	%	%	%
Last month	2.6	2.9	4.3	0.2	5.3	1.0
Last 6 months	3.1	3.8	5.0	0.2	6.2	0.7
Last 2 years	1.9	3.3	3.6	1.2	2.6	0.7
Longer or never	92.4	90.0	87.1	98.3	85.9	97.6
	100.0	100.0	100.0	100.0	100.0	100.0

Valid Responses 419

<u>Cottage and cream cheese</u>. Thirty percent of the households had bought cottage cheese in the last month and 17 percent had bought cream cheese (Table 18).

TABLE 18

Frequency of Buying Cottage and Cream Cheese

Frequency of Buying	Cottage Cheese	Cream Cheese
	%	%
Last month	30.1	16.5
Last 6 months	17.7	16.0
Last 2 years	4.5	3.8
Longer or never	47.7	63.7
	100.0	100.0

Valid Responses 419

<u>Household characteristics.</u> A larger proportion of households with children regularly bought processed, cottage and cream cheese. This was not the case for specialty cheese (Table 19).

TABLE 19

Other Types of Cheese Bought by
Whether Household Has Children

Bought in Last Month	Households with No Children	Households with Children
	%	%
Processed	48.5	56.7
Specialty	22.2	19.4
Cottage and Cream	32.6	37.8
Valid Responses	239	180

There was also a tendency for households in the younger age groups to regularly buy processed cheese and specialty cheese : for cottage and cream cheese the pattern was not as clear. Except for a larger proportion of the professional and managerial group buying specialty and cottage and cream cheese there were no clear differences between the occupational groups (See Appendix 8, Table 49).

There were no clear relationships between the quantity of cheddar bought and the regular purchases of other types of cheese.

Imported cheese. Fifteen percent of the households had bought imported cheese in the last two years. Larger proportions of these were in the professional managerial, clerical sales and service occupational groups and the middle age groups (Table 20).

TABLE 20

Imported Cheese by Occupation and Age of Head of Household

(i) Occupation	Professional and Managerial	Clerical Sales and Service	Tradesmen and Labourer	Retired	Other
Bought in Last 2 Years	%	%	%	%	%
Yes	26.4	22.0	9.2	5.8	16.7
No	73.6	78.0	90.8	94.2	83.3
	100.0	100.0	100.0	100.0	100.0
Valid Responses	72	100	109	86	18
(ii) Age	**Under 25 Yrs**	**25-34 Yrs**	**35-49 Yrs**	**50-64 Yrs**	**Over 64 Yrs**
Bought in last 2 Years	%	%	%	%	%
Yes	5.4	23.8	21.0	15.1	3.5
No	94.6	76.3	79.0	84.9	96.5
	100.0	100.0	100.0	100.0	100.0
Valid Responses	37	80	100	106	57

There was no clear relationship between quantity of cheddar bought and purchase of imported cheese.

2.5 Expenditure on Cheese

Weekly household expenditure. The average weekly expenditure on cheese was $1.92 with over 90 percent of the households spending between 50c and $3, while for cheddar and colby the average was $1.39 with over 80 percent spending between 50c and $3 per week. Very few households spent more than a dollar a week on either processed, specialty or cottage and cream cheeses (Table 21).

TABLE 21

Distribution of Household Expenditure on Cheese

Amount Spent Per Week	Cheddar Colby	Processed	Specialty	Cottage Cream	All[a] Cheese
	%	%	%	%	%
0	0.0	23.6	58.7	39.4	0.0
1c - 49c	8.5	52.5	31.0	44.7	3.3
50c - 99c	23.5	17.9	6.9	13.1	17.5
$1.00 - 1.49	23.3	4.3	2.8	1.7	22.6
$1.50 - 1.99	17.7	1.7	0.4	0.7	16.8
$2.00 - 2.49	18.0	0.0	0.0	0.0	15.3
$2.50 - 2.99	3.2	0.0	0.0	0.0	10.0
$3.00 or more	5.8	0.0	0.0	0.0	14.5
	100.0	100.0	100.0	100.0	100.0
Valid Responses	412				

[a]All cheese includes cheddar/colby, processed specialty and cottage/cream

Per capita expenditure. The average expenditure per capita was 68c per week, with 90 percent of the households spending between 25c and $1.25, while for cheddar the average was 48c. Very few households had a per capita expenditure on processed, specialty or cottage and cream cheese of more than 50¢ (Table 22).

TABLE 22

Distribution of Per Capita Expenditure on Cheese

Amount Spent Per Week	Cheddar Colby	Processed	Specialty	Cottage Cream	All Cheese
	%	%	%	%	%
0	0.5	23.6	58.7	39.4	0.0
1c - 24c	14.6	49.9	28.5	43.4	5.0
25c - 49c	39.8	25.5	9.4	15.3	32.3
50c - 74c	31.7	2.9	1.7	1.2	30.8
75c - 99c	5.4	0.5	1.0	0.5	16.8
$1.00 - 1.24	5.1	0.5	0.0	0.0	6.8
$1.25 or more	2.9	0.0	0.7	0.2	8.3
	100.0	100.0	100.0	100.0	100.0
Valid Responses	412				

Socio-economic characteristics. Households without children and with 1-2 occupants tended to have a higher per capita expenditure (Table 23). However, there was little variation between households in the different occupational and age groups (see Appendix 8, Table 50).

TABLE 23

Average Weekly per Capita Expenditure on Cheese by Household Composition

	1-2 Occupants	3-4 Occupants	Over 4 Occupants	All Households
Households without children	82c (171)	60c (51)	-	78c (226)
Households with children	-	59c (104)	51c (67)	56c (173)
All Households	82c (173)	59c (155)	54c (71)	68c (399)

Note: The numbers in brackets are the number of valid responses. Averages were not included when there were only several responses.

2.6 Changes in Cheese Purchases

Cheddar. Fifty-one percent of the households said they were eating more cheddar than two years ago; 12 percent were eating less and 37 percent about the same. This compared with 16 percent who said they would buy more in the future; 5 percent would buy less and 79 percent about the same. "Change in eating habits", "More and different uses", "Household size changes", and "Children getting older" were the main reasons given for eating more, while "Household getting smaller" and "Health and diet reasons" were the main reasons given for eating less (Table 24).

TABLE 24

Reasons for Changing Cheddar Consumption

Reasons	Eating More (i) In Last 2 Yrs	Eating More (ii) In Future	Eating Less (i) In Last 2 Yrs	Eating Less (ii) In Future
	%	%	%	%
Change in Eating Habits	20.4	5.1	15.2	6.3
More or Different Uses	17.7	13.6	0.0	0.0
Household Size Changes	13.3	18.6	50.0	62.5
Children Getting Older	30.4	52.4	2.2	6.3
Health/Diet Reasons	3.9	3.4	23.9	12.5
Promotion/ Advertising	3.9	0.0	0.0	0.0
Price of Substitute Foods	2.8	1.7	6.5	12.5
Other Reasons	7.7	5.1	2.2	0.0
	100.0	100.0	100.0	100.0
Valid Responses	181	59	46	16

Other types of cheese. Sixteen percent of the households indicated they were buying more processed cheese than two years ago; 6 percent were buying more specialty and 20 percent more cottage or cream cheese.

Larger proportions of the clerical sales service occupational group and the middle age group had bought more processed cheese. No clear differences were revealed for specialty or cottage and cream cheese (Table 25).

TABLE 25

Occupation and Age of Head of Households Buying More of Other Types of Cheese

(i) Occupation	Professional and Managerial	Clerical Sales and Service	Tradesmen and Labourer	Retired	Other
	%	%	%	%	%
Processed	13.9	20.5	16.4	12.2	11.1
Specialty	8.9	4.5	5.2	6.7	5.6
Cottage/Cream	25.3	19.6	19.0	13.3	33.3
Valid Responses	79	112	116	90	18
(ii) Age	**Under 25 Yrs**	**25-34 Yrs**	**35-49 Yrs**	**50-64 Yrs**	**Over 64 Yrs**
	%	%	%	%	%
Processed	10.0	22.3	20.8	12.7	6.7
Specialty	7.5	7.4	5.7	5.5	3.3
Cottage/Cream	27.5	20.2	21.7	18.2	13.3
Valid Responses	40	94	106	110	60

NOTE: The percentages of households in the different age and occupational groups.

The main reasons given for buying more of these other types of cheese were "Eating habits change" (34 percent); "More and different uses" (28 percent); and "Health and diet reasons" (21 percent).

<u>Types of specialty cheese which will be bought in the future</u>. Those respondents that had bought specialty cheeses were then asked which types they intended to buy in the future. The most popular were blue vein, parmesan, gruyere, camembert and cheshire (Table 26).

TABLE 26

Types of Specialty Cheese Which Will be Bought in the Future

Type	% Households Buying Specialty Cheese in Future
Blue Vein	51.1
Camembert	14.6
Cheshire	11.2
Denbo	5.6
Edam	5.6
Erbo	4.5
Fetta	9.0
Gouda	7.9
Gruyere	21.3
Havarti	1.1
Parmesan	31.5
Romano	1.1
Valid Responses	89

NOTE: Up to 3 responses were recorded from any respondent.

<u>Goat and sheep milk cheese</u>. Respondents were asked if they would be prepared to try cheeses made from goat or sheep's milk. Seventy-one percent said they would, 25 would not and 4 percent were undediced. Greater proportions in the middle and younger age groups were willing (Table 27).

TABLE 27

Households Willing to Try Sheep and Goat Milk Cheese By Occupation and Age of Head of Household

(i) Occupation	Professional and Managerial	Clerical Sales and Service	Tradesmen and Labourer	Retired	Other
	%	%	%	%	%
Willing	72.7	81.4	76.7	63.5	77.8
Not Willing	27.3	18.6	23.4	36.5	22.2
	100.0	100.0	100.0	100.0	100.0
Valid Responses	77	102	111	85	18

(ii) Age	Under 25 Yrs	25-34 Yrs	35-49 Yrs	50-64 Yrs	Over 64 Yrs
	%	%	%	%	%
Willing	75.0	87.8	81.0	61.8	64.3
Not Willing	25.0	12.2	19.0	38.2	35.7
	100.0	100.0	100.0	100.0	100.0
Valid Responses	40	90	100	102	56

CHAPTER 3

HOUSEHOLD CONSUMPTION AND STORAGE PATTERNS

3.1 Consumption at Home

Ways consumed. Forty-three percent of the households consumed cheese by itself most days, 32 percent had it with biscuits, 27 percent had it with bread and 18 percent had it toasted or grilled. The majority of the households had cheese in all of these ways in the last year (Table 28).

TABLE 28

Ways Cheese is Consumed

Frequency	By Itself	With Bread	Toasted or Grilled	With Biscuits
	%	%	%	%
Most days	42.9	26.7	18.2	31.9
Twice weekly	18.7	21.6	27.1	27.1
Weekly	9.4	16.3	27.8	12.2
Fortnightly	5.5	5.0	10.8	7.0
Monthly	3.4	2.6	6.5	8.9
Longer	4.5	4.3	2.9	3.6
Never	15.6	23.3	6.7	9.3
	100.0	100.0	100.0	100.0
Valid Responses 417				

Times of day. Twenty-three percent of the households had had cheese with breakfast in the last year, 81 percent with lunch and 36 percent with the evening meal. For non-meal times 53 percent had served it in the morning, 65 percent in the afternoon, 36 as a pre-dinner snack and 73 percent with supper.

The most popular way to have cheese with breakfast was toasted and grilled; for lunch it was with bread or toasted and grilled and for dinner toasted and grilled. For non-meal times the most popular ways were having cheese with biscuits, or having it by itself, and for supper toasted and grilled (Table 29).

TABLE 29

Times of Day When Cheese is Served by Way Served

	With Biscuits	With Bread	Toasted Grilled	By Itself
	%	%	%	%
(i) Meal Times				
Breakfast	2.1	5.7	15.3	7.2
Lunch	25.5	55.8	49.6	29.1
Evening Meal	9.1	9.3	22.0	13.1
(ii) Non-Meal Times				
Morning	32.2	6.2	7.9	36.8
Afternoon	39.1	10.5	9.8	42.7
Pre-dinner	11.7	3.8	6.4	29.8
Supper	48.2	10.3	37.9	37.9
Valid Responses 419				

NOTE: Percentages are of those households eating cheese.

A greater proportion of households with children had served cheese for breakfast and lunch and the non-meal times (except supper) (see Table 30). There were no clear differences between households in the different occupation and age groups except for a smaller proportion of the retired older age group having cheese with supper (see Appendix 8, Table 51).

TABLE 30

Times of Day When Cheese is Served
by Whether Household has Children

	Households With No Children	Households With Children
	%	%
<u>Meal Times</u>		
Breakfast	20.9	27.2
Lunch	77.8	90.6
Evening Meal	38.1	37.2
<u>Non-Meal Times</u>		
Morning	49.0	61.1
Afternoon	61.1	73.3
Pre-dinner	35.1	40.0
Supper	74.1	76.1
Valid Responses	239	180

<u>Who eats the snacks</u>. In the majority of households the whole family consumed the cheese snacks at different times of the day. Snacks were classified as non-meal time uses (see question 6 of Appendix I).

3.2 Use of Cheese in Preparation of Meals and in Baking

Ways Used. The most frequent uses were cheese in salads and grating it and sprinkling it as a garnish. These were followed by cheese sauce, with eggs, cooked with vegetables, in pizzas, in baking and in a fish dish, in that order (see Table 31). Other uses mentioned included in a meat dish (3 percent of households), soup (1 percent), fondues (1 percent) and dips (1 percent).

TABLE 31

Ways Cheese Used in the Preparation of Meals

Frequency	Cheese Salad in Summer	Grated Sprinkled as Garnish	Cheese Sauce Macaroni or Spaghetti	With Eggs (eg Omelette, Soufflés)
	%	%	%	%
Most days	30.5	6.5	1.0	0.5
Twice Weekly	29.1	17.7	7.9	7.7
Weekly	14.9	22.5	25.7	18.7
Fortnightly	2.6	13.4	19.0	19.7
Monthly	4.6	9.4	15.1	18.0
Longer	2.6	9.9	10.6	11.5
Never	15.6	20.6	20.7	24.0
	100.0	100.0	100.0	100.0
"Used at least weekly"	74.5	46.7	34.6	26.9

Frequency	Cooked With Vegetables	In Pizzas	In Baking	In Fish Dish
	%	%	%	%
Most days	2.2	1.2	1.0	0.5
Twice Weekly	9.9	2.9	3.4	3.1
Weekly	13.9	15.9	12.2	7.4
Fortnightly	11.5	17.6	12.5	11.3
Monthly	11.5	18.3	16.5	12.5
Longer	9.9	11.1	17.5	14.0
Never	41.1	33.0	36.9	51.3
	100.0	100.0	100.0	100.0
"Used at least weekly"	26.0	20.0	16.6	11.0

Valid Responses 417

Socio-economic characteristics. The socio-economic characteristics of households using cheese in different ways are tabulated in Appendix 8, Table 52. In general there was a lower level of use in the retired group and older age groups. For baking there was also a lower level of use in the younger age group.

Who prepares. The wife was the person who usually prepared the cheese dishes in eighty-five percent of the households, while in the remaining 15 percent it was shared between the wife, husband and children.

3.3 Cheese in Cut Lunches

Households having cut lunches. Sixty-one percent of the households had someone regularly taking a cut lunch, with 24 percent having one person, 18 percent two, 10 percent three, and 9 percent 3 or more.

Cheese in cut lunches. Of those having cut lunches 54 percent had cheese 3 or more times a week, 25 percent twice a week and 13 once a week. Eighty-five percent had cheese on its own, 75 percent in sandwiches and 23 percent with biscuits.

Who prepares the cut lunches. In 77 percent of the households[14] the wife usually prepared the cut lunch, in 9 percent the husband and in the remaining households adults and children carried out the preparation.

3.4 Substitutes for Cheese

Cut lunches. Respondents were asked if cheese was not available for a cut lunch what would they serve instead. Fifty percent of the respondents mentioned cold meat or sausage, 40 percent savoury sandwich fillings (e.g. marmite), 29 percent fresh fruit, 22 percent vegetables (e.g. tomato, celery, etc), 18 percent sweet sandwich fillings, 9 percent eggs, 7 percent sweet biscuits and cake. Other substitutes mentioned were tinned fish, dried fruit and yoghurt.

Snacks at home. Respondents were also asked if there was no cheese in the house what would they have instead as a snack. Thirty-five percent mentioned savoury spreads, e.g. marmite; 34 percent fresh fruit; 22 percent vegetables, e.g. tomatoes, celery, lettuce; 17 percent sweet biscuits; 15 percent sweet spreads; 14 percent cold meat/sausages; 8 percent eggs; 7 percent cake and 5 percent dried fruit. Other substitutes mentioned were soup, sardines and other tinned fish.

[14] Households with husband and wife.

Meals Without Meat or Fish. Forty-eight percent of the households did not always have meat or fish with the main meal of the day. Eight percent of these households did not have meat or fish meals most days; 17 percent twice weekly; 26 percent weekly; 13 percent fortnightly; 9 percent monthly and the remaining 25 percent less often. There were no clear differences between the occupational and age groups.

Takeaways as the main meal of the day. Fifty percent of the households had takeaways as the main meal of the day in the last year. Greater proportions of these were households with children and in the younger age groups (Table 32).

TABLE 32

Takeaways by Occupation and Age of Head of Household

(i) Occupation	Professional and Managerial	Clerical Sales and Service	Tradesmen and Labourer	Retired	Other
Households with:	%	%	%	%	%
No Children	38.5	43.5	45.5	20.0	70.7
Children	77.8	65.6	69.2	0.0	66.7
All Households	57.3	56.1	59.6	21.7	68.8
Valid Responses	75	107	109	83	16
(ii) Age	**Under 25 Yrs**	**25-34 Yrs**	**35-49 Yrs**	**50-64 Yrs**	**Over 65 Yrs**
Households with:	%	%	%	%	%
No Children	70.0	59.1	48.0	25.6	18.5
Children	87.5	68.1	72.6	38.5	-
All Households	73.7	65.9	66.3	27.2	18.6
Valid Responses	38	91	98	103	55

Note: Percentages have not been calculated where there was only one occupant.

Types of takeaways. Fish and chips was the most popular takeaway meal. (Table 33).

TABLE 33

Different Types of Takeaway Meals

	Fish & Chips	Chicken	Hamburgers	Chinese	Pizzas
	%	%	%	%	%
Weekly	26.3	2.5	6.6	1.5	2.5
Fortnightly	21.7	4.5	5.6	2.0	3.0
Monthly	21.2	18.2	10.6	9.1	7.6
Longer	19.2	36.4	19.2	24.1	17.3
Never	11.6	38.4	58.1	61.6	69.5
	100.0	100.0	100.0	100.0	100.0
Valid Responses	198				

Note: The percentages are of those households having takeaway meals.

3.5 Storing Cheese

Where it is kept. Ninety-nine percent of the households kept the cheese in a refrigerator.

How it is kept. Seventy-seven percent of the households kept their cheese in the original wrap. Of the 33 percent that removed it from its original wrap, 72 percent kept it in a plastic bag, 13 percent a plastic container, and 4 percent a cheese dish with a lid. A large proportion of households that kept cheese in its original wrap also kept it in a plastic bag or used glad wrap to cover it.

CHAPTER 4

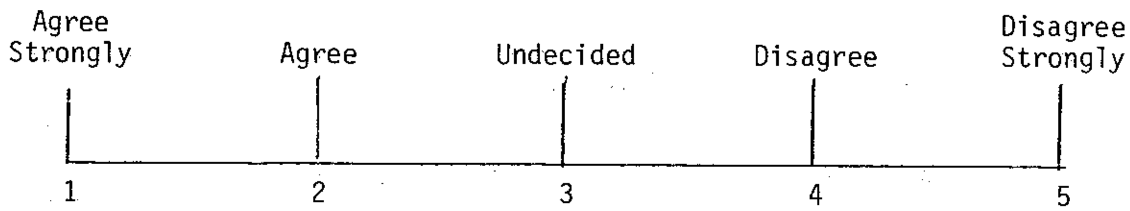
ATTITUDES TOWARDS CHEESE

4.1 Meat and Eggs as Substitutes

Respondents were shown a card with six attitude statements. The first two were:

1. CHEESE IS A SUBSTITUTE FOR MEAT
2. CHEESE IS A SUBSTITUTE FOR EGGS.

They were then shown a five point scale as follows:



and asked to indicate the point on the scale which best described their feelings about each statement.

Over half of the respondents agreed with the two statements but with a slightly higher level of agreement with statement 2 (Table 34).

TABLE 34

Attitudes Towards Meat and Eggs as Substitutes

Ranking	1) Cheese is a substitute for meat	2) Cheese is a substitute for eggs
	%	%
1) Agree strongly	12.2	7.9
2) Agree	40.8	47.7
3) Undecided	8.4	14.4
4) Disagree	32.6	26.1
5) Disagree strongly	6.0	3.8
	100.0	100.0
Agree (1+2)	53.0	55.6
Disagree (4+5)	38.6	29.9
Valid Responses 417		

There was little difference in the level of response for the households in the different occupational and age groups (see Appendix 8, Table 53). However, 'rare' users showed a lower level of agreement (see Appendix 8, Table 54).

4.2 Cheese and Dinner

The next two statements were:

3. CHEESE CAN BE USED IN PLACE OF PUDDINGS

4. A CHEESE BOARD COMPLETES A SATISFYING DINNER.

There was a higher level of agreement for both of these statements than for the previous two statements with statement 4 being above statement 3. (Table 35).

TABLE 35

Attitudes Towards Having Cheese with Dinner

Ranking	3) Cheese is a substitute for pudding	4) A cheese board completes a satisfying dinner
	%	%
Agree strongly	8.6	14.4
Agree	53.5	55.0
Undecided	8.4	10.3
Disagree	25.2	19.5
Disagree strongly	4.3	0.7
	100.0	100.0
Agree (1+2)	62.1	69.4
Disagree (4+5)	29.5	20.2
Valid Responses 417		

The lowest level of agreement for both statements was in the tradesmen and labourer and "other" occupational groups and under 25 year old age group (see Appendix 8, Table 53). There was little difference in the level of agreement between the "rare" "light" "medium" and "heavy" users (see Appendix 8, Table 54).

4.3 Value for Money

The next statement was

5) COMPARED WITH OTHER THINGS TODAY, CHEESE IS GOOD VALUE FOR MONEY

The majority of respondents agreed with this statement (see Table 36) with the highest level of agreement in the retired older group (see Appendix 8, Table 53). The level of agreement did not vary with the amount of cheese used (see Appendix 8, Table 54).

4.4 Health Value

The last statement was:

6) TOO MUCH CHEESE IS BAD FOR ONE'S HEALTH

Over half of the respondents disagreed with this statement, 19 percent were undecided and 29 percent agreed (Table 36). The level of agreement did not vary between the different occupational and age groups, or the amount of cheese used (see Appendix 8, Table 53, 54).

TABLE 36

Attitudes Towards Health Value and Value for Money

Ranking	5) Cheese is good value for money today	6) Too much cheese is bad for one's health
	%	%
1) Agree strongly	20.6	3.6
2) Agree	65.9	25.5
3) Undecided	8.6	19.2
4) Disagree	3.6	36.1
5) Disagree strongly	1.2	15.6
	100.0	100.0
Agree (1+2)	86.6	29.1
Disagree (4+5)	4.8	51.7
Valid Responses 417		

CHAPTER 5

PROMOTION OF CHEESE

5.1 Information Sources

Respondents were asked where they had recently heard or seen anything about cheese. Results are shown in Table 37.

TABLE 37

Information Sources for Cheese

Media	"Top of Head" %	Total unprompted %	Total unpromted and prompted %
T.V. Advertising	70.0	79.5	89.5
T.V. Programmes	2.3	6.8	11.9
Radio	4.0	19.4	30.5
Magazines	1.4	11.1	31.6
Newspapers	2.3	14.5	28.4
In Store Displays	7.4	32.8	47.4
Valid Response 430			

NOTE: (i) The percentages are of all households
(ii) Top of Head is the first unprompted response
(iii) Prompted recall is when the respondent was read the list of media.

There was a higher recall of T.V. advertising in the professional and managerial occupational group and the middle and younger age groups; while for T.V. programmes and magazines the highest recall was in the middle age group; and radio, newspapers and in store displays in the middle and younger age groups (see Appendix 8, Table 55).

The recall of T.V. advertising did not vary markedly with the number of hours the respondents watched T.V. per day (Table 38) except that those watching 4 hours or more had lower "top of head" awareness.

TABLE 38

Awareness of T.V. Advertisements
by Hours of T.V. Watched per Day

	1 Hour or less	2 Hours	3 Hours	4 Hours or more
	%	%	%	%
Top of Head	77.4	70.0	73.3	59.0
Total Unprompted	77.6	85.1	81.4	86.9
Total Prompted and Unprompted	87.1	90.7	93.3	85.2
Valid Responses	98	114	86	99

5.2 Recall of T.V. Advertising

Those respondents that had seen cheese advertised on T.V. were asked what the T.V. advertisement was about. The recall was dominated by the mention of Bruce Forsythe which was followed by "bigger block" and "family block" (Table 39).

TABLE 39

Recall of T.V. Advertising

Recall		"Top of Head"	Total Unpromoted
		%	%
"Bruce Forsythe"		49.9	69.0
"Bigger block"		28.2	39.7
"Family block"		13.2	28.2
"Des Briton"		1.4	11.0
"Little girl"		1.4	10.7
"Many uses"		0.3	4.9
"Rugby player"		0.0	4.4
"Good for you"		0.0	2.2
Valid Responses	365		

NOTE: (i) "Top of Head" is the first unprompted response
(ii) Up to 3 responses were recorded per household.

There was a higher level of recall in the non-retired occupational groups and middle and younger age groups. The pattern of recall for "Bruce Forsythe", "Bigger block", and "Family block" was similar within the different occupational and age groups (see Appendix 8, Table 56).

5.3 The Family Block Sticker

Awareness of Stickers Respondents were shown a card with the old and new Family Block Stickers (see Appendix 4) and asked if they had seen either of them. Thirty six percent said they had seen both; 44 percent the old label only; 5 percent the new label only and 15 percent neither.

As with advertising recall there was a higher level of awareness in the non-retired occupational group and middle and younger age groups. The highest recall for the new label was in the under 25 year old age group (Table 40).

TABLE 40

Awareness of Family Block Sticker by Occupation and Age of Head of Household

(i) Occupation	Professional and Managerial	Clerical Sales Service	Tradesmen and Labourer	Retired	Other
Aware of:	%	%	%	%	%
Old label only	49.4	45.8	49.1	28.7	55.6
Both labels or New label	41.6	43.0	41.2	45.9	16.7
Neither	9.1	11.2	9.6	25.3	27.8
	100.0	100.0	100.0	100.0	100.0
Valid Responses	77	107	114	87	18

(ii) Age	Under 25 Years	25-34 Years	35-49 Years	50-64 Years	Over 64 Years
Aware of:	%	%	%	%	%
Old label only	42.1	47.3	48.1	45.2	27.6
Both labels or New label	52.7	42.9	40.6	35.5	46.5
Neither	5.3	9.9	11.3	19.2	25.9
Valid Responses	38	91	106	104	58

There was no clear relationship between the level of awareness and the quantity of cheese bought or the hours of T.V. watched (see Appendix 8, Table 57).

<u>Knowledge of the Sticker's weight qualification</u> The respondents were then asked how big a block of cheese had to be before it could have a Family Block Sticker. Twentysix percent of the respondents correctly said 900 gms; 7 percent said 500 gms or less; 20 percent between 6-800 gms; 9 percent 1 kg; 4 percent over 1 kg and 35 percent said they did not know.

Apart from the proportion of correct estimates increasing slightly with the number of T.V. hours watched there were no clear differences for socio economic characteristics or quantity of cheese bought (see Appendix 8, Tables 58, 59). The field work was done seven weeks after the new Family Block Sticker was launched.

CHAPTER 6

IMPLICATIONS

The main purpose of this study was to provide a detailed description of household consumption, purchasing patterns and attitudes which when combined with other industry data could be used by the industry to plan its marketing operations.[15] This chapter will first discuss the current and potential demand for cheese and opportunities for stimulating demand, then specific implications will be made for the different groups within the industry (i.e. producers, manufacturers, distributions, retailers and the industry's national associations).

6.1 The Demand for Cheese

Factors influencing demand. The domestic demand for cheese may be influenced by a large number of factors. These range from the marketing policies of the firms and their national associations within the industry to environmental factors which are outside the control of the industry. Environmental factors include those which are independent of the industry's actions (e.g. changes in population, income, culture and lifestyle, technology) and other factors which may be influenced by the firms within the industry and their national associations. These include consumer behaviour and attitudes, producers' activities, retailers' activities, government legislation, the media, vocal minorities, the marketing effort of industries with substitute products (e.g. meat products, sandwich spreads, vegetables, yoghurt)[16] and complementary products (bread, biscuits, soup).

Aggregate demand, product variety demand and brand share. It is important to distinguish between factors affecting aggregate demand, the

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[15] Caution is necessary when drawing national implications from a survey of one city. However, a comparison of the survey results with the Nielsen retail audit data indicates purchasing patterns to be similar.

[16] The Dairy Board may wish to consider cottage and cream cheese as substitutes as they are not under the Board's direct control.

demand for the varieties within that aggregate and the brand share for each variety. For example, changes in population and the price of cheese relative to substitute foods may have major influences on aggregate demand, while other factors such as consumer attitudes and experience with cheese may cause changes in the demand for the different varieties.

Thus, care should be taken to evaluate the industry's marketing activities that influence

1. aggregate demand.
2. product variety demand.
3. brand share.

These dimensions should be considered simultaneously when considering a strategy which is aimed at stimulating aggregate demand.

Consumer and industrial markets. It is also important to distinguish between the industry's industrial markets (i.e. caterers, hotels, restaurants, clubs, takeaway food bars, institutions, and food manufacturers) and the consumer markets (household consumption) when developing and evaluating a marketing strategy.[17] The present study is concerned with consumer markets.

Changes in the market environment affecting aggregate demand.

Population. The combination of steady increases in population and per capita consumption in the 1960s and early 1970s resulted in favourable annual increases in aggregate demand (see Table 1). However, since 1975 the annual increase in population has dropped below 1 percent with an actual decline in population occuring in the last year. With a very low rate of population increase projected for the next two decades the effect of total population growth on demand can be expected to be small.[18]

Household composition. While total population is an important factor determining the level of demand, so also are changes in its

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[17] It is estimated that bulk sales to industrial markets are currently 8-9,000 tonnes compared with total sales of 25,000 tonnes (personal communication with Dairy Board).

[18] For details on trends in population growth see Monthly Abstract of Statistics, e.g. July 1979, p.3, Table 1 and p.4, Table 5.

composition. Of particular importance in recent years has been the changing household composition, with an increase in the proportion of households with 1-2 occupants and a decline in the average family size (see Appendix 7). The importance of these changes is highlighted in Table 23 where households without children and/or fewer occupants have higher per capita consumption.[20] If this trend continues it could have the tendency of increasing demand.

Relative prices. In the last decade movements in the prices of some of the substitutes for cheese (e.g. meat, sandwich spreads, biscuits, cake) have created a favourable environment for marketing cheese (see Appendix 6). This is summarised by comparing changes in the retail price of cheese with the consumer price index for food. In the period 1970-79 there was a 155 percent increase in the price of cheese compared with a 184 percent increase in the consumer price index for food, and in the period 1975-79 the retail price for cheese increased by 45 percent compared with a 81 percent increase in the retail price for food.

This favourable "price position" for cheese was highlighted in the survey where 87 percent of respondents agreed that "compared with other things today, cheese is good value for money" (see Table 36), which compares with 75 percent who agreed with this statement in the 1972 Massey University survey (see Appendix 9).[21]

Real income. The recent levelling and decline in "real income"[22] in combination with the favourable movement in the relative price for cheese has provided an additional factor in creating a favourable environment for marketing cheese.

Consumer attitudes. A comparison between the 1972 Massey University and current survey results provide an indication of some changes in attitudes to

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[20] A similar trend exists for most food items, e.g. see Table 22, p.23 "Bread: A Consumer Survey of Christchurch Households", A.E.R.U., Research Report, No. 91, Table 22, p.23.

[21] The same statement was tested in the 1978 Lincoln bread survey where 76 percent agreed. See Table 45, p.48. Ibid.

[22] An indication of "real" income is provided by the average nominal weekly wage for males deflated by the consumer price index. See Monthly Abstract of Statistics, Dept of Statistics, July 1979, Table 118, p.85.

cheese as a food. For example, 53 percent of the respondents agreed that cheese could be used as a substitute for meat compared with 35 percent in 1972, and 56 percent agreed that cheese could be used as a substitute for eggs compared with 39 percent in 1972 (see Appendix 9).

Lifestyle. Also important are changes in lifestyle which affect the potential number of meals and other situations where cheese may be consumed. The survey gives an indication of the importance of a number of recent changes.

- the increasing popularity of takeaway meals (section 3.6, 50 percent of the households had takeaways one or more times as a main meal of the day in the last year).
- vegetarian meals (section 3.5, 48 percent of the households did not always have meat or fish with the main meal of the day).

Marketing effort. Apart from the environmental changes the increased marketing effort has had a marked affect on increasing the cheese share of grocery expenditure. Section 6.7 reviews the effectiveness of the current promotion programme. An important consideration is the degree of promotional support which will be given in the future. For example, if the prospect for exporting New Zealand dairy products (especially cheese) improves then it may be politically desirable to curb domestic demand hence reducing the promotional support for cheese.

6.2 Product Variety Demand

Where possible the results will be compared with the 1972 Massey University results. Also it will be indicated how the household survey augment the Nielsen retail audit[23].

Market Share for different varieties. The survey results indicate cheddar and colby to have 71 percent share of household expenditure on cheese; processed 13 percent; specialty 7 percent and cottage and

[23] Unfortunately the Nielsen data is supplied on a confidential basis to the New Zealand Dairy Board and hence cannot be included in this report.

cream cheese 9 percent.[24] The cheddar/colby purchase could be further broken down into tasty 31 percent; mild 30 percent and colby 10 percent.[25] Section 2.5 provides details about the variation in expenditure between households.

Sizes bought. The majority of cheddar/colby sales were in the 600 gm to 1 kilo size range (Section 2.2).

Changes since 1972. Changes in demand since 1972 include:

- a decline in the popularity of mild cheddar.
- a swing from plain processed cheese to smoked and flavoured processed cheese.
- small increases in the popularity of a number of specialty cheese.
- a marked increase in the popularity of cottage and cream cheese.[26]

More details of these changes are given in Appendix 9.

Recent and future changes. Using the results of section 2.6 the following provisional forecasts can be made:[27]

- a slowing down in the rate of growth of total cheddar sales
- a swing towards tasty at the expense of mild
- greater growth in processed and cottage and cream sales compared with specialty cheese sales
- blue vein, parmesan, gruyere, camembert and cheshire having the greatest growth potential in the specialty cheese range.

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[24] These estimates are based on respondents' recall of what they spent on cheese in the last month. More accurate estimates could be obtained from the Nielsen bimonthly retail audit data.

[25] Based on the proportion of households buying the different types in the last month.

[26] Unfortunately the 1972 Massey University survey did not collect details about the size of blocks bought.

[27] More accurate forecasts could be obtained by combining the survey results with the Nielsen retail audit data.

Buyer profiles. Chapter 2 and especially sections 2.2 and 2.5 provide information which can be used to develop buyer profiles for households with different purchasing patterns for cheese. Table 41 provides an example of a profile developed to distinguish the characteristics of "rare","light","medium" and "heavy" cheddar users. The profile compares demographic and socio-economic characteristcs and product related behaviour. Further analysis could extend this profile to include consumption behaviour and psychographic characteristics. The profile analysis shows there are few differences in the characteristics of these groups.

TABLE 41

Profile of "Rare", "Light", "Medium" and "Heavy" Users of Cheddar

	Rare	Light	Medium	Heavy
(i) Per Capita Expenditure (c/wk)	1 - 19c (< 100 gm)	20 - 39c (100-200 gm)	40 - 69c (201-300 gm)	Over 69c (> 300 gm)
(ii) Demographic and Socioeconomic Characteristics				
Age (Appendix 13)	Little difference between groups			
Family Life Cycle/ Household Composition (Tables 21, 50).	Higher per capita consumption for households without children and with 1-2 occupants,i.e. younger people without families or older people whose children have grown up.			
Occupation (Appendix 13)	Little difference between groups			
(iii) Product Related Behaviour				
Variety Preferred	Little difference between groups			
Most common sizes bought (Table 10)	2-500 gm	500 g-1 kilo	600gm-1 kilo	600-2½ kilo
Frequency of Buying	Less than once per week		Once or more per week	
Brand Loyalty (Table 13)	Little difference between "rare", "light", "medium"			Slightly higher loyalty
Product Attributes (Table 47)	Higher level of agreement among "medium" and "heavy" users for "texture", "the brand" and "bigger block".			
Processed, Specialty, Cottage and Cream Cheese and Imported Cheese	Little difference between groups			
Willingness to try new product	Little difference between groups			

6.3 Stimulating Demand

Identifying market opportunities. A detailed analysis of current demand is fundamental to any marketing strategy[28] aimed at increasing total consumption of cheese. Such an analysis will identify target areas where consumption can be increased, or where current consumption is threatened by substitute foods and also provide a point of reference for evaluating the effect of alternative marketing strategies.

Chapter 3 provides the basis for this analysis. It identifies:

- situations when cheese is consumed at home, how it is consumed and the frequency of consumption (Section 3.1).
- cheese in cut lunches (section 3.3).
- use of cheese in the preparation of meals (Section 3.2).
- the relative importance of the different consumption patterns to aggregate demand (given by proportion consuming and frequency of consumption).
- demographic and socioeconomic characteristics.
- substitutes for cheese (Section 3.4).

Table 42 summarises this information. Some of the sections of the table have not been completed as they were not investigated in the survey. These could be completed with further research.

Changes since 1972. A comparison with the 1972 results indicates only moderate changes in the proportions of households consuming cheese at

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[28] Marketing strategy extends beyond advertising and promotion. It reflects an integrated appraisal covering product price and distribution policies timed to match the market opportunities in target market segments (i.e. groups of consumers).

TABLE 42

Profile of Demand for Cheese

Situations where Cheese is eaten	Importance	Main way Consumed	Heavy User Characteristics	Product Varieties	Substitutes	Complements
Meal Times						
Breakfast	Moderate (23% hshlds)	Toasted/Grilled	Hshlds with children Younger/middle age group			
Lunch	Very (81% hshlds)	With Bread Toasted/Grilled By Itself With Biscuits	Hshlds with children Younger/middle age group			
Dinner	Quite (36% hshlds)	Toasted/Grilled By Itself	Middle age group			
Non Meal Times						
Morning	Quite (53% hshlds)	By Itself With Biscuits	Hshlds with children		Snacks (In order of importance) Savoury spreads Fresh fruit Vegetables Sweet biscuits Sweet spreads Eggs Sweet biscuits/cake	
Afternoon	Very (65% hshlds)	By Itself With Biscuits	Hshlds with children			
Predinner	Quite (36% hshlds)	By Itself With Biscuits	Hshlds with children			
Supper	Very (73% hshlds)	With Biscuits Toasted/Grilled By Itself	Younger/middle age group			
Cut Lunches	Very (61% hshlds)	By Itself In sandwiches			Cut Lunches (In order of importance) Coldmeat/sausage Savoury sandwich fillings Fresh fruit Vegetables Sweet sandwich fillings	

Note: Some of the sections have not been completed as they were not investigated in the survey. These could be completed with further research.

the different times of day or even in the way it is served (see Appendix 28). Thus it can be concluded that the increase in per capita consumption has come largely from an increase in the frequency of use,[29] rather than new ways of consumption.

A marketing strategy for the 1980s. It is beyond the scope of this report to provide a marketing strategy. However, the authors would like to emphasise the importance of the framework set out in Table 42 in identifying where the increased consumption will come from. An attempt should also be made to build a similar profile for the cheese industry's industrial markets (i.e. caterers, hotels, restaurants, clubs, takeaway foodbars, institutions and food manufacturers) which at present contribute to approximately one third of total domestic demand.[30]

6.4 Milk Producers

The power of marketing to aid diversification from export markets to a domestic market is amply demonstrated by the doubling of New Zealand cheese consumption from 12,900 to 26,100 tonnes in the six year period 1973 to 1979. Dairy farmers must not be allowed to forget the methods used nor that market share can also be lost to substitutes (Section 3.4) through incompetent marketing.

To put the importance of the domestic market in perspective, New Zealanders consumed one quarter of the 1977-78 New Zealand cheese delivered, being only second to Japan.[31]

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[29] Unfortunately the 1972 Massey University survey did not obtain information on frequency of use.

[30] Bulk sales to industrial markets are estimated to be 8-9,000 tonnes. (Personal communication with N.Z. Dairy Board).

[31] See 1978 New Zealand Dairy Board Report, Tables 7,9.

Whilst in overseas markets New Zealand producers may still be "price takers", there is an opportunity domestically to partially recoup inflationary cost increases due to the favourable value perception for cheese relative to other products (Table 36). The public indicated no adverse reaction to cheese (Chapter 5).

Town milk suppliers have penetrated with cottage and cream cheese 35 percent of households in a limited period, whereas specialty cheeses with their innumerable varieties achieved 21 percent penetration (Table 4). These statistics together with Nielsen retail audit information should assist in monitoring product development for specialty cheese. In this respect farmers should periodically enquire from their co-operatives whether sufficient investment is being made in new product development and test marketing.

6.5 Processors and Distributors

Brand Awareness Processors and distributors should be generally satisfied with the strong brand recall (Table 14). There is a question whether such proliferation of brand names is necessary to provide adequate consumer choice (Appendix 8, Table 48). Rising transport costs, particularly inter-island, may cause rationalisation of brands stocked by retailers.

Generic activities Awareness of family block stickers (Section 5.3) is high compared with individual brands, yet the family block history is less than 2½ years[32]. This power of generic promotion in influencing aggregate demand (Section 6.1) has been demonstrated, so that individual brand promotion needs to be relegated in favour of a national co-ordinated effort.

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[32] The national family block campaign was launched in early 1977.

With the forecast of cheddar cheese sales slowing down (Section 6.2), increased frequency or new uses will need to be stimulated to sustain the growth in aggregate demand (Section 6.3 and Table 42). To make such changes mass media advertising and publicity in substantial amounts will be required and the cost may be beyond the resources of an individual co-operative. The consistency of the messages nationally in respect to health, value and uses will be vital as the impact would be reduced if conflicting creative platforms were developed by each cooperative.

Specialty cheese. The low penetration of specialty cheese (Table 17) could indicate some past dissatisfaction. Research should be undertaken to investigate this. In order to obtain economies of scale and to establish a bridgehead, it may be prudent to concentrate development varieties (Table 26), e.g. Blue Vein, Parmesan, Gruyere, Camembert, and Fetta. The domestic varieties chosen should be selected for their export potential, so that the domestic market becomes a useful testing ground.

6.6 Retailers

Supermarkets have a great ability to innovate as those occupation and age groups that adopt new varieties, such as imported (Table 20) and cottage/cream cheese (Table 25), mainly purchase at supermarkets. This younger group of shoppers particularly in the 25-49 age group indicate a willingness to experiment with further varieties (Table 27)/

Grocers and Dairies. With limited space, grocers and dairies will have to select their range carefully to suit the predominant socio-economic groups in their neighbourhood. Grocers, particularly those serving the elderly households, will need a substantial variety of smaller blocks of cheddar and processed and will need to introduce slowly a limited range of specialty cheeses (Appendix 8, Table 45). If grocers and dairies are not to loose their cheese business with the under 49 age group it may be necessary to have a clearly identified area for serving cheese, such as a cheese bar.

Delicatessen. As only 4 percent of respondents indicated using this outlet it was not possible to identify a clear profile of shoppers. However, with the growth of specialty outlets in shopping arcades, development in specialty cheese could be directed at delicatessens or even possibly cheese stalls. Through such outlets a sophisticated image could be portrayed. Delicatessen counters within supermarkets may also need more consideration.

6.7 Review of the 1979 Promotion Campaign in Christchurch

With the field work done seven weeks after the start of an intensive multi media campaign the recognition of the new Family Block stickers (the focal point of the 1979 campaign) as 41 percent (Table 40) is a disappointment. The talent promoting the new Family Block concept (Table 39) achieved the higher unprompted recall of 69 percent. This may reflect the quality of the TV commercials and the impact of the talent dominating the ultimate commercial message.

The authors' observation was that the fault was not caused by the power of the television, but rather the lack of support at the ground level. The major problem in store was not just the lack of the new sticker on product and on point of sale promotion material, but the dominant existence of the previous year's sticker which had supposedly been withdrawn. This created confusion with consumers and will explain much of the low 41 percent new sticker recall (Section 5.3). This demonstrates the necessity of an integrated promotion mix rather than relying on a media campaign.

6.8 The Dairy Board

Until 1979 the "bigger block campaign" seemed a continuous success. The 1979 campaign has done no harm but its impact in Christchurch has not been as effective due to lack of discipline in distribution. The major danger facing any generic campaign is that one party can sabotage it. It is understood that full precautions had been taken to prevent any one party breaking the overall campaign to their advantage, but it seems such precautions were not enough. An important maxim in such promotional campaigns is that the product must be in full distribution before the campaign breaks on mass media.

It seems that the discipine required in marketing as compared to trading or selling has not been fully recognised.

APPENDICES

APPENDIX I : THE QUESTIONNAIRE

CHEESE SURVEY

Good morning/afternoon/evening. I am from the Lincoln College Marketing Department. We are doing a survey about cheese. Would you help us by answering a few questions. ASK TO SPEAK TO THE HOUSEWIFE OR THE PERSON WHO USUALLY BUYS THE GROCERIES. IF THIS IS NOT POSSIBLE ARRANGE A SUITABLE CALLBACK TIME. 1

1a. Does your household eat cheese?
1. Yes ( ) 2. Rarely ( ) 3. No ( ) IF NO GO TO Q.11

b. Who usually decides what types of cheese to buy?
1. Wife ( ) 2. Husband ( ) 3. Wife-Husband ( ) 4. S Male-Female ( )
5. Children ( ) 6. Wife-Children ( ) 7. Adults-Children ( )
8. Other ( ) ______

c. Who usually buys the cheese?
1. Wife ( ) 2. Husband ( ) 3. Wife-Husband ( ) 4. S Male-Female ( )
5. Children ( ) 6. Wife-Children ( ) 7. Adults-Children ( )
8. Other ( ) ______

d. Where do you buy your cheese? RECORD SEQUENCE OF RESPONSE.
1. Supermarket ( ) 2. Grocery ( ) 3. Dairy ( ) 4. Delicatessan ( )
5. Wholesaler ( ) 6. Cheese Factory ( ) 7. Other ( ) ______ (9-11)

Here is a list of types of cheese. SHOW CARD A (CHEDDAR-COLBY GROUP ONLY).

2 First of all Cheddar and Colby.

a. Which types have you bought in the last: (i) month? ENTER 1 (ii) 6 months? ENTER 2. (iii) 2 years? ENTER 3. IF HAS NOT BOUGHT ANY IN LAST 2 YEARS Q2d.
1. Mild Cheddar ( ) 2. Medium Cheddar ( ) 3. Tasty Cheddar ( ) 4. Colby ( )

b. How often do you buy cheddar or colby cheeses?
1. 3 or more times/week ( ) 2. twice/week ( ) 3. once/week ( )
4. 2 weeks ( ) 5. 3 weeks-1 month ( ) 6. 2-3 months ( ) 7. longer ( )

c. What size blocks do you usually buy? SHOW CARD B.
1. 2-300 gms (½ lb) ( ) 2. 4-500 gms (1 lb) ( ) 3. 6-800 gms (1½ lb) ( )
4. 900 gms - 1 kilo (2-2½ lbs) ( ) 5. 1½-2 kilos (3-5 lb) ( )
6. 2½ kilos and over (> 5 lbs) ( ) (22)

d. Which of these labels have you seen? SHOW LABELS.
1. Old label ( ) 2. New label ( ) 3. Both ( ) 4. Neither ( )

e. How big does a block of cheddar have to be before it can have a family block sticker?
1. 2-300 gms (½ lb) ( ) 2. 4-500 gms (1 lb) ( ) 3. 6-800 gms (1½ lb) ( )
4. 900 gms (2 lb) ( ) 5. 1 kilo (2½ lbs) ( ) 6. 1½-2 kilos (3-5 lbs) ( )
7. 2½ kilos (5½ lbs) ( ) 8. > 2½ kilos (> 5½ lbs) ( ) 9. Don't know ( )

f. About how much would your household spend on cheddar (and colby) per week? $ ______

g. (i) Do you think you are buying more or less cheddar than 2 years ago?
1. More ( ) 2. Less ( ) 3. About the same ( ) 4. Don't know ( )
IF SAME OR DON'T KNOW Q2h.
(ii) Why are you buying more/less? ______

h. (i) Do you think you will buy more or less cheddar in the future?
1. More ( ) 2. Less ( ) 3. About the same ( ) 4. Don't know ( )
IF SAME OR DON'T KNOW Q3.
(ii) Why do you think you will buy more/less? ______ (31)

Now some questions about brands of cheddar.

3a. First of all what brand names can you remember? RECORD SEQUENCE OF RECALL. THEN PROMPT* AND ENTER 9 IF REMEMBERED. * DO NOT PROMPT FOR PRIVATE BRANDS OR FAMILY BLOCK.
1. Anchor ( ) 2. Barrys' Bay ( ) 3. Cloverlea ( ) 4. Dairylea ( )
5. Galaxy ( ) 6. Golden Bay ( ) 7. Kaikoura ( ) 8. Koromiko ( )
9. Mainland ( ) 10. Rai Valley ( ) 11. Waitohi ( ) 12. Valuemetric ( )
13. Private Brands eg Woolworths ( ) 14. Family Block ( )
15. Other ( ) ______ (46)

b. We now want to enquire about what influences which block of cheddar you buy. Using this scale (SHOW SCALE A) please indicate how important: ...
(i) Being on special is? ( ) (ii) The price per kilo? ( )
(iii) Being available in a bigger block? ( ) (iv) The brand? ( )
(v) The taste? ( ) (vi) The texture? ( )

c. Is there anything else you consider to be important? No ( ) or ______

d. Do you always buy the same brand of cheddar? 1. Always ( )
2. Nearly always (2 out of 3 times) ( ) 3. Sometimes (half the time) ( )
4. No ( ) (55)

2

4 And now the other types of cheese. SHOW CARD A AGAIN.

a. (i) Which types of processed cheeses have you bought in the last: ...
(i) month? ENTER 1, (ii) 6 months? ENTER 2 (iii) 2 years? ENTER 3. IF HAS NOT BOUGHT Q4b.
1. Plain ( ) 2. Smoked ( ) 3. Flavoured ( )

(ii) About how much would your household spend per month on processed cheeses?
Less than $1 ( ) or $ ________

b. (i) Which types of specialty cheeses have you bought in the last: ...
(i) month? ENTER 1 (ii) 6 months? ENTER 2 (iii) 2 years? ENTER 3. IF HAS NOT BOUGHT Q4c.
1. Blue Vein ( )__ 2. Camembert ( )__ 3. Cheshire ( )__ 4. Danbo ( )__
5. Edam ( )__ 6. Erbo ( )__ 7. Fetta ( )__ 8. Gouda ( )__
9. Gruyere ( )__ 10. Havarti ( )__ 11. Parmesan ( )__ 12. Romano ( )__
13. Other Specialty Cheeses ( ) ________

(ii) Which types do you intend to buy in the future? RECORD SEQUENCE OF RESPONSE ALONGSIDE BRACKETS ABOVE.

(iii) About how much would you spend per month on specialty cheeses?
Less than $1 ( ) or $ ________

c. (i) Have you bought any cottage or cream cheese in the last: ...
(i) month? ENTER 1 (ii) 6 months? ENTER 2 (iii) 2 years? ENTER 3. IF HAS NOT BOUGHT Q4d.
1. Cottage cheese ( ) 2. Cream cheese ( )

(ii) About how much would you spend per month on cottage and cream cheese?
Less than $1 ( ) or $ ________ (33)

d. (i) Are you buying any more processed cheese, specialty cheese, or cottage and cream cheeses than 2 years ago? PROMPT FOR TYPES. IF NOT BUYING MORE Q3e.
1. More processed ( ) 2. More specialty ( ) 3. More cottage & cream ( )

(ii) Why? ________

e. Have you bought any imported cheeses in the last year?
1. Yes ( ) 2. No ( ) 3. Don't know ( )

f. Would you be prepared to try cheeses made from goat or sheep's milk?
1. Yes ( ) 2. No ( ) 3. Don't know ( ) (37)

5 Now some questions about your household's use of cheese for cut lunches.

a. How many people take cut lunches to work or school? None ( ) or ____ IF NONE Q6.

b. Who usually prepares the cut lunches?
1. Wife ( ) 2. Husband ( ) 3. Wife-Husband ( ) 4. S Male-Female ( )
5. Children ( ) 6. Wife-Children ( ) 7. Adults-Children ( )
8. Other ( ) ________

c. How often do they have cheese with their cut lunches? IF NEVER ( ) Q6.
1. 3 or more times/week ( ) 2. twice/week ( ) 3. once/week ( )
4. once/2 weeks ( ) 5. once/month ( ) 6. 2-3 months ( ) 7. longer ( )

d. How do they usually have cheese with their lunch?
1. On its own ( ) 2. in sandwiches ( ) 3. with biscuits ( ) 4. Other ____

e. If cheese was not available to have with a cut lunch what would you use instead? RECORD RESPONSES IN SEQUENCE.
1. Fresh Fruit ( ) 2. Dried Fruit ( ) 3. Vegetables ( ) (42-44)
4. Cold meat-Sausages ( ) 5. Sweet Sandwich Fillings ( ) 6. Savoury Sandwich Fillings ( ) 7. Sweet biscuits ( ) 8. Cake ( ) 9. Other ( ) ________

6 Cheese can be eaten in many ways at home.

a. How often does your household have it:

USE FOLLOWING CODE. 0 = NEVER, 1 = MOST DAYS, 2 = 2/WK, 3 = WKLY, 4 = FORTNIGHTLY, 5 = MNTHLY, 6 = 2-3 MNTHS, 7 = LONGER	(i) With Biscuits	(ii) With Bread	(iii) Toasted Grilled	(iv) By Itself
	( )	( )	( )	( )

b. With which meals and snacks would you have cheese with: ..
ASK (i) TO (iv) AND ENTER 1 IN TABLE AGAINST APPROPRIATE TIMES.

Meals	1 Breakfast				
	2 Lunch				
	3 Dinner				
Snacks	4 Morning				
	5 Afternoon				
	6 Predinner				
	7 Supper				

c. Who mainly eats these snacks? 1. Wife ( ) 2. Husband ( ) 3. Wife-Husband ( )
4. S Male-Female ( ) 5. Children ( ) 6. Wife-Children ( )
7. Adults-Children ( ) 8. Other ( ) ________ (77)

d. If cheese ran out what would you have instead for these snacks? RECORD RESPONSES IN SEQUENCE. 1. Fresh Fruit ( ) 2. Dried Fruit ( ) 3. Vegetables ( ) (78-80)
4. Cold meat & Sausages ( ) 5. Sweet Spreads eg Jam ( ) 6. Savoury Spreads eg Marmite ( ) 7. Sweet Biscuits ( ) 8. Cake ( ) 9. Other ________

3

7 Cheese can also be used in the preparation of meals and in baking.

a. How often do you use cheese: (i) in a cheese salad in summer? ( ) (ii) cooked with vegetables ( ) (iii) as a cheese sauce or with macaroni or spaghetti? ( ) (iv) in pizzas? ( ) (v) in a fish dish? ( ) (vi) with eggs eg omelette, souflées? ( ) (vii) Grated and sprinkled as a garnish? ( ) (viii) in baking? ( )
USE FOLLOWING CODE. 0 = NEVER, 1 = MOST DAYS, 2 = 2/WEEK, 3 = WEEKLY, 4 = FORTNIGHTLY, 5 = MONTHLY, 6 = 2-3 MONTHS, 7 = LONGER ______

b. Are there any other ways you use cheese in cooking? None ( ) or ______

c. Who usually prepares these cheese dishes? 1. Wife ( ) 2. Husband ( ) 3. Wife-Husband ( ) 4. S Male-Female ( ) 5. Children ( ) 6. Wife-Children ( ) 7. Adults-Children ( ) 8. Other ( ) ______ (15)

8 Now a few questions about keeping cheese.

a. (i) Once you have opened a pack of cheese do you keep it in its original wrap?
1. Yes ( ) 2. No ( ) IF YES Q8b.
(ii) How do you keep it? 1. Plastic bag ( ) 2. Plastic container ( ) 3. Cheese dish with lid ( ) 4. Other ( ) ______

b. Where do you keep it? 1. Refrigerator ( ) 2. Pantry/safe ( ) 3. Other ( ) ______

9 Here is a list of statements about cheese. Using this scale (SHOW SCALE B) please indicate how much you agree or disagree with each statement.
(i) ______ (ii) ______ (iii) ______ (iv) ______ (v) ______ (vi) ______

10a Does your household ever have takeaways as a main meal? 1. Yes ( ) 2. No ( ) IF NO Q10c.

b How often do you have: (i) Chicken ( ) (ii) Chinese ( ) (iii) Fish 'n' Chips ( ) (iv) Hamburgers ( ) (v) Pizzas ( ) (vi) Other ( ) ______
USE FOLLOWING CODE. 0 = NEVER, 1 = MOST DAYS, 2 = 2/WEEK, 3 = WEEKLY, 4 = FORTNIGHTLY, 5 = MONTHLY, 6 = 2-3 MONTHS, 7 = LONGER

c How often do you have the main meal of the day without meat or fish?
1. Most days ( ) 2. 2/Week ( ) 3. Weekly ( ) 4. Fortnightly ( ) 5. Monthly ( ) 6. 2-3 Months ( ) 7. Longer ( ) 8. Never ( ) GO TO Q12. (32)

11 Why does your household never eat cheese? ______

12a Where have you recently seen or heardanything about cheese? RECORD SEQUENCE OF RECALL, THEN PROMPT AND ENTER 9 IF REMEMBERED. 1. TV Advertisements ( ) 2. TV Programmes eg Beauty & Beast ( ) 3. Radio ( ) 4. Magazines ( ) 5. Newspapers ( ) 6. In-store displays ( ) 7. Other ( ) ______
IF DOES NOT MENTION TV ADVERT OR PROGRAMME Q12c.

b What was the TV advertisement about? RECORD SEQUENCE OF RECALL. 1. Bigger Block ( ) 2. Family Block ( ) 3. Many uses ( ) 4. Good for you ( ) 5. Des Britten ( ) 6. Bruce Forsythe ( ) 7. Little Girl ( ) 8. Rugby Player ( ) 9. Other ( ) ______

c On average how long do you watch TV per day? ___ hrs or 7. ½ hr ( ) 8. less ½ hr ( ) 9. never ( ) (44)

13a How many people live in your house? ______

b (i) How many are preschool age? __ (ii) at primary school? __ (iii) at high school? __

c How many people do full time jobs? ______ (FULL TIME > 30 HOURS/WEEK)

d What jobs do they do? PROMPT FOR POSITION IN HOUSEHOLD AND ENTER HEAD OF HOUSEHOLD AS (i)

		Position in House
(i)	______	Head
(ii)	______	______
(iii)	______	______

e Which age group do you belong to: 01. Younger than 25 ( ) 02. 25-29 ( ) 03. 30-34 ( ) 04. 35-39 ( ) 05. 40-44 ( ) 06. 45-49 ( ) 07. 50-54 ( ) 08. 55-59 ( ) 09. 60-64 ( ) 10. Over 64 yrs ( )

f (i) Were you (INCLUDE SPOUSE) born overseas? IF NO ( ) Q12g
(ii) If YES where? ENTER 1
1. U.K. ( ) 2. Holland ( ) 3. Other European ( ) 4. Pacific Islands ( ) 5. Asian ( ) 6. Other ( ) ______ THEN Q14

g (i) Were your parents born overseas? IF NO ( ) Q14 (ii) Where? ENTER 2 ABOVE.

14 Respondent's address ______ Phone No. ______
Time of day interview completed ______ date ______ Interviewer's Signature (63-65)

(i) THANK RESPONDENT. (ii) CHECK ALL QUESTIONS HAVE BEEB ASKED.

APPENDIX 2

SAMPLE DETAILS

Suburbs	Street	Number of Interviews
Addington	Parlane Street	14
Aranui	Lenton Street	12
Avonhead	Norton's Road	13
Avonside	Silverdale Place	7
Beckenham	Malcolm Avenue	12
Bishopdale	Drysdale Place	8
Bromley	Griffith's Avenue	9
Bryndwr	Orkney Street	9
Burnside	Ambleside Drive	9
Cashmere	Dyers Pass Road	12
Dallington	Landy Street	9
Fendalton	Heathfield Avenue	9
Ilam	Ashfield Place	12
Halswell	Bidwell Place/Saby Road	17
Heathcote	Marsden Road	12
Hoon Hay	Kaiwara Street	9
Hornby (1)	Buchanans Road	8
Hornby (2)	Dickson Crescent	10
Hillsborough	Ribbonwood Place	11
Hillmorton	Sylan Street	10
Huntsbury	Conifer Place	12
Linwood	Aldwins Road/Rochester Street	17
Mairehau	Chilton Drive	8
Merivale	Tonbridge Street	12
Mt. Pleasant	Major Hornbrook Road	6
North New Brighton	Jutland Street	9
Oaklands	Nottingham Avenue	9
Opawa	Newbery Street	12
Papanui	Meadow Street	12
Riccarton	Kea Street	9
Richmond	Vogel Street	9
Somerfield	Woodard Terrace	12
Spreydon	Marley View	9
St. Albans	Onslow Street	9
St. Martins	Roscoe Street	12
Sydenham	Rodgers Street	12
Upper Riccarton	Cheyenne Street	12

Appendix 2 (cont.)

Suburbs	Street	Number of Interviews
Wainoni	Tenby Place	9
Waltham	Hornbrook Street	9
Wigram	Witham Street	9
Woolston	Ashmole Place	10
		430

APPENDIX 3

A CLASSIFICATION OF TYPES OF CHEESE

A. CHEDDAR/COLBY
1) Mild Cheddar
2) Medium Cheddar
3) Tasty Cheddar
4) Colby

B. PROCESSED
1) Plain e.g. Chesdale
2) Smoked
3) Other Flavoured e.g. Curry, Chives, Onion

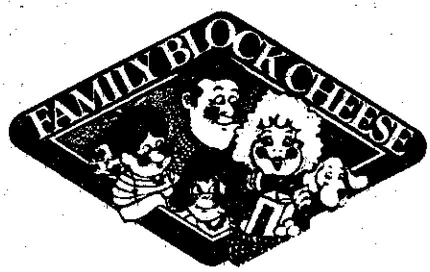
C. SPECIALTY
1) Blue Vein
2) Camembert
3) Cheshire
4) Danbo
5) Edam
6) Erbo
7) Fetta
8) Gouda
9) Gruyere
10) Havarti
11) Parmesan
12) Romano

D. CREAM AND COTTAGE CHEESE
1) Cottage Cheese
2) Cream Cheese

APPENDIX 4

THE FAMILY BLOCK STICKERS

Old Label



New Label

APPENDIX 5

Per Capita Consumption of
Cheese : A Comparison Between OECD Countries

Country	1975	1976	1977	1978
Australia	5.9	5.2	6.6	
Canada	7.1	6.4	6.3	6.6
Denmark	9.6	9.0	9.0	
France	15.4	16.2	17.0	
Italy	11.3	11.0	11.7	
Netherlands	10.9	11.8	12.1	
New Zealand	5.0	6.5	7.1	7.5
Switzerland	11.5	12.0	12.3	
United Kingdom	6.3	6.1	5.5	
U.S.A.	8.6	9.3	9.3	9.8
West Germany	11.8	12.3	12.8	
Japan	0.5	0.6	0.7	

Sources: Monthly Abstract of Statistics, Jan, Feb, 1979, Note of the Month p. 3 and personal communcation with N.Z. Dairy Board.

APPENDIX 6

Price of Cheese Compared with Substitute and Complementary Foods

Food Items	Average Retail 1970	1975	Price ¢/kg June 1979	% Change 1970-79	1975-79
Cheese (Tasty)	94	166	240	155	45
Apples	31	52	60	94	15
Carrots	19	39	46	142	18
Blade Steak	124	161	331	167	105
Hogget Chops	91	137	280	207	104
Bacon	174	346	563	223	63
Ham	270	479	730	170	52
Mince	95	110	255	168	132
Sausages	56	95	165	195	74
Fish - Fresh	112	209	402	259	92
Salmon Canned (220 gm)	235	373	504	114	35
Milk (600 ml)	4	4	15	275	275
Eggs doz.	50	79	112	124	42
Butter	63	71	125	98	76
Bread - sliced wrapped	16	20	55	244	175
Biscuits - Choc. wheaten	118	176	336	185	91
Cake - Maderia	91	149	278	205	87
Jam	67	107	198	196	85
Soup - Canned (450 gm)	53	68	113	113	66
Baked Beans/Spaghetti Canned (450 gm)	48	73	114	138	56
Chocolate - large block	191	308	574	201	86
Consumer Price Index for Food (Base 1970 = 100)	100	157	284	184	81

Sources: Department of Statistics, Prices Wages and Labour, 1970, 1975, and personal communication with Department of Statistics.

APPENDIX 7

New Zealand Household Composition

(i) Number of Occupants	New Zealand Census 1956	1961	1966	1971	1976
	(000 households)				
1 - 2	195.3	229.1	266.9	324.8	414.7
3 - 4	220.0	232.9	250.2	274.3	323.2
Over 4	157.2	180.8	199.0	202.6	203.4
	572.5	642.8	716.1	801.7	941.3
	%	%	%	%	%
1 - 2	34.1	35.6	37.3	40.5	44.1
3 - 4	38.4	36.3	34.9	34.2	34.3
Over 4	27.5	28.1	27.8	25.3	21.6
	100.0	100.0	100.0	100.0	100.0

(ii) Number of Children[a]	New Zealand Census 1966 %	1971 %	1976 %
Husband and Wife only	29.0	31.6	34.7
+ 1 child	18.3	17.8	17.3
2 children	22.2	22.0	23.8
3 or more children	30.5	28.6	24.1
	100.0	100.0	100.0

a. The percentages are for households of one complete family only. Census figures were only available from 1966.

Source: Department of Statistics, New Zealand. Census of Population and Dwellings 1956, 1961, 1966, 1971, 1976.

APPENDIX 8

Further Survey Results

TABLE 43

Outlet Used by Occupation and Age of Head of Household

	Professional Managerial	Clerical Sales Service	Tradesmen and Labourers	Retired	Other
	%	%	%	%	%
Supermarket	87.3	84.8	87.1	81.1	94.4
Grocer	25.3	12.5	9.6	24.4	5.6
Dairy	5.1	7.1	10.3	13.3	11.1
Delicatessen	6.3	5.4	1.7	3.3	0.0
Wholesaler	3.8	4.5	6.0	6.7	5.1
Cheese Factory	20.3	13.4	6.0	5.6	5.6
Valid Responses	79	112	116	90	18

	Under 25 Yrs	25-34 Yrs	35-49 Yrs	50-64 Yrs	Over 64 Yrs
	%	%	%	%	%
Supermarket	92.5	85.1	87.7	82.7	83.3
Grocer	5.1	8.5	16.0	22.7	28.3
Dairy	7.5	10.6	8.5	6.4	13.3
Delicatessen	0.0	5.3	6.6	3.6	1.7
Wholesaler	2.5	4.3	5.7	6.4	5.0
Cheese Factory	5.0	11.7	14.2	9.1	8.3
Valid Responses	40	90	106	110	60

TABLE 44

Types of Cheddar and Colby Bought By

Occupation and Age of Head of Household
(controlled for Household Composition)

(i) Occupation	Professional and Managerial	Clerical Sales and Service	Tradesmen and Labourer	Retired	Other
	%	%	%	%	%
Households with:					
No Children					
Mild	47.5	41.7	52.1	38.2	60.6
Medium	22.5	20.4	14.6	12.4	20.0
Tasty	62.5	50.0	52.1	50.0	50.0
Colby	30.0	16.3	12.5	5.6	10.0
Valid Responses	40	48	48	89	10
Households with:					
Children					
Mild	53.8	60.3	63.2	-	14.3
Medium	28.2	19.0	14.7	-	50.0
Tasty	43.6	42.9	32.4	-	42.9
Colby	26.3	19.0	17.6	-	0.0
Valid Responses	39	63	68	1	4
All Households					
Mild	50.6	52.3	58.6	37.8	41.2
Medium	25.3	19.6	14.7	13.3	33.3
Tasty	53.2	45.9	40.5	50.6	47.1
Colby	28.2	17.9	15.5	5.6	5.6
Valid Responses	79	112	116	90	18

TABLE 44 (cont.)

(ii) Age	Under 25 Yrs	25-34 Yrs	35-49 Yrs	50-64 Yrs	Over 64 Yrs
Households with:	%	%	%	%	%
No Children					
Mild	60.0	62.5	55.6	57.3	62.7
Medium	23.3	33.3	14.3	9.4	20.3
Tasty	40.0	54.2	44.4	62.5	44.8
Colby	16.7	20.8	10.7	15.6	5.1
Valid Responses	30	24	27	96	59
Households with:					
Children					
Mild	50.0	44.9	34.6	71.4	-
Medium	20.0	18.6	21.8	28.6	-
Tasty	30.0	34.8	39.7	57.1	-
Colby	10.0	14.5	23.1	21.4	-
Valid Responses	10	69	78	14	1
All Households					
Mild	57.5	50.5	60.0	40.9	36.7
Medium	22.5	22.3	19.8	11.8	20.0
Tasty	37.5	39.8	41.0	61.8	45.8
Colby	15.0	16.1	19.8	16.4	5.0
Valid Responses	40	73	106	110	60

Note: The percentages do not add up to 100 percent because some households bought more than one type of cheese in the last month.

TABLE 45

Size of Block Bought by Occupation and
Age of Head of Household
(Controlled for Household Composition)

(i) Occupation	Professional and Managerial	Clerical Sales and Service	Tradesmen and Labourer	Retired	Other
Households with:					
1-2 occupants	%	%	%	%	%
2-300 gms	14.8	13.3	15.2	39.7	28.6
4-500 gms	11.5	20.6	21.9	16.9	33.3
6-800 gms	37.0	36.7	30.3	20.3	0.0
900 gms - 1 kilo	29.6	16.7	21.2	11.3	28.6
1½ - 2 kilos	3.7	3.3	6.0	1.3	0.0
≥ 2½ kilos	0.0	10.0	9.1	5.0	0.0
Valid Responses	27	30	33	78	7
3-4 occupants	%	%	%	%	%
2-300 gms	0.0	12.0	10.2	0.0	0.0
4-500 gms	2.9	18.0	11.9	28.6	14.3
6-800 gms	41.2	32.0	33.9	14.3	14.3
900 gms - 1 kilo	52.9	38.0	37.3	57.1	42.9
1½ - 2 kilos	2.9	2.0	0.0	0.0	0.0
≥ 2½ kilos	2.9	2.0	5.1	0.0	14.3
Valid Responses	34	50	59	7	6
5 or more occupants	%	%	%	%	%
2-300 gms	5.9	0.0	0.0	-	0.0
4-500 gms	5.9	10.7	13.6	-	25.0
6-800 gms	29.4	17.9	38.1	-	75.0
900 gms - 1 kilo	58.8	59.3	45.5	-	25.0
1½ - 2 kilos	0.0	3.6	0.0	-	0.0
≥ 2½ kilos	5.9	7.1	0.0	-	0.0
Valid Responses	17	28	21	1	4
All Households	%	%	%	%	%
2-300 gms	6.4	9.1	9.7	35.6	11.8
4-500 gms	6.5	16.4	15.0	17.4	23.5
6-800 gms	37.2	30.9	33.6	21.6	22.2
900 gms - 1 kilo	46.2	36.7	34.2	14.6	33.3
1½ - 2 kilos	2.6	2.7	0.0	1.1	0.0
≥ 2½ kilos	2.6	5.5	5.3	4.5	5.6
Valid Responses	78	110	114	89	18

TABLE 45 (cont.)

(ii) Age	Under 25 Yrs	25-34 Yrs	35-49 Yrs	50-64 Yrs	Over 64 Yrs
Households with:					
1-2 occupants	%	%	%	%	%
2-300 gms	0.0	13.6	35.3	22.7	40.4
4-500 gms	27.3	9.1	25.0	19.4	15.4
6-800 gms	54.5	40.9	11.8	24.3	22.2
900 gms - 1 kilo	18.2	31.8	5.9	22.7	7.4
1½ - 2 kilos	0.0	4.5	0.0	1.3	3.7
≥ 2½ kilos	0.0	0.0	17.6	6.7	6.7
Valid Responses	11	22	17	75	52
3-4 occupants	%	%	%	%	%
2-300 gms	10.0	9.6	2.1	13.8	0.0
4-500 gms	28.6	13.5	4.2	17.2	0.0
6-800 gms	38.1	30.8	37.5	27.6	0.0
900 gms - 1 kilo	19.0	42.3	45.8	41.4	100.0
1½ - 2 kilos	0.0	1.9	2.1	0.0	0.0
≥ 2½ kilos	0.0	3.8	6.3	3.4	0.0
Valid Responses	20	52	48	29	4
5 or more occupants	%	%	%	%	%
2-300 gms	0.0	0.0	2.6	0.0	-
4-500 gms	16.7	5.0	10.5	0.0	-
6-800 gms	66.7	26.3	31.6	0.0	-
900 gms - 1 kilo	0.0	55.0	54.1	100.0	-
1½ - 2 kilos	0.0	0.0	2.6	0.0	-
≥ 2½ kilos	0.0	10.0	2.6	0.0	-
Valid Responses	6	20	38	3	1
All Households	%	%	%	%	%
2-300 gms	5.6	8.5	7.7	19.3	36.8
4-500 gms	26.3	10.6	9.7	17.9	15.8
6-800 gms	47.4	32.3	31.7	25.9	20.3
900 gms - 1 kilo	15.8	42.6	41.7	29.4	13.6
1½ - 2 kilos	0.0	2.1	1.9	0.9	3.4
≥ 2½ kilos	0.0	4.3	6.7	5.5	3.4
Valid Responses	38	94	104	109	59

TABLE 46

Reasons Influencing Choice of Type of Block By Occupation and Age of Head of Household

(i) Occupation	Professional and Managerial	Clerical Sales and Service	Tradesmen and Labourer	Retired	Other
	%	%	%	%	%
"Tastes"	96.1	91.7	98.2	87.1	93.8
"Texture"	77.6	74.8	77.5	75.9	46.7
"On Special"	76.0	67.3	73.9	65.9	62.5
"The Brand"	57.9	69.4	56.8	59.3	50.0
"Price per Kilo"	55.3	57.8	61.8	59.8	62.5
"Bigger Block"	66.7	56.0	58.9	40.7	53.3
Valid Responses	76	109	110	82	16

(ii) Age	Under 25 Yrs	25-34 Yrs	35-49 Yrs	50-64 Yrs	Over 64 Yrs
"Tastes"	97.5	92.2	95.1	94.2	87.7
"Texture"	76.9	78.4	72.8	74.5	74.5
"On Special"	82.1	65.9	68.0	74.0	64.3
"The Brand"	61.5	57.3	62.1	63.4	60.0
"Price per Kilo"	64.1	58.4	55.3	63.4	53.6
"Bigger Block"	65.8	62.9	60.6	50.5	34.5
Valid Responses	39	89	103	101	56

Note: The percentages are the number of respondents in each group ranking the reason as quite important, very important or important.

TABLE 47

Reasons Influencing Choice of Type of Block by Quantity of Cheddar Consumed

	Rare[a] User	Light User	Medium User	Heavy User
	%	%	%	%
"Taste"	93.3	91.0	96.2	91.5
"Texture"	65.5	74.3	77.1	77.2
"On Special"	48.3	69.9	73.7	72.9
"The Brand"	53.3	53.1	66.2	65.5
"Price per Kilo"	43.3	62.1	57.8	60.3
"Bigger Block"	43.3	50.3	61.0	63.2
Valid Responses	30	145	154	58

Rare - 1-19¢ expenditure and less than 100 gm/wk per capita
Light - 20-39¢ " " " " 100-200 gm/wk per capita
Medium - 40-69¢ " " " " 201-300 gm/wk " "
Heavy - Over 69¢ " " greater than 300 gm/wk " "

TABLE 48

Brand Recall for Cheddar Cheese

	Top of Head	Total Recall Unprompted	Total Recall Unprompted and Prompted[a]
	%	%	%
Anchor	0.5	2.4	17.9
Barrys' Bay	20.0	44.1	37.5
Cloverlea	4.3	13.3	36.3
Dairylea	6.4	16.3	46.5
Galaxy	0.7	3.4	22.9
Golden Bay	1.2	4.5	25.1
Kaikoura	2.6	10.5	30.3
Koromiko	6.7	21.0	40.6
Mainland	7.4	19.4	50.1
Spring Valley	1.0	7.6	-[c]
Rai Valley	3.8	10.7	27.0
Waitohi	19.3	36.5	37.7
Valuemetric	7.2	19.1	40.8
Private Brands	1.2	4.6	1.4
Other Brands	1.7	5.3	7.6
Valid Responses	419		

a "Top of Head" is the first unprompted response.

b Prompted recall is when the interviewer reads out the brand names which were not recalled unprompted.

c Spring Valley was not tested for prompted recall.

TABLE 49

Other Types of Cheese Bought by Age and Occupation of Head of Household

(i) Occupation	Professional and Managerial	Clerical Sales and Service	Tradesmen and Labourer	Retired	Other
	%	%	%	%	%
Households with:					
No Children					
Processed	57.5	46.9	52.1	41.6	70.0
Specialty	40.0	20.4	10.4	21.3	20.0
Cottage or Cream	50.0	32.7	29.2	25.8	50.0
Valid Responses	40	49	48	89	10
Households with:					
Children					
Processed	56.4	58.7	57.4	-	37.5
Specialty	17.9	25.4	14.7	-	0.0
Cottage or Cream	48.7	31.7	33.8	-	50.0
Valid Responses	39	63	68	1	8
All Households					
Processed	57.0	53.6	55.2	42.2	55.6
Specialty	29.1	23.2	12.9	22.2	11.1
Cottage and Cream	49.4	32.1	31.9	26.7	50.0
Valid Responses	79	112	116	90	18

TABLE 49 (cont.)

(ii) Age	Under 25 Yrs	25-34 Yrs	35-49 Yrs	50-64 Yrs	Over 64 Yrs
	%	%	%	%	%
Households with:					
No Children					
Processed	76.7	62.5	42.9	43.8	39.0
Specialty	16.7	25.0	28.6	21.9	20.3
Cottage or Cream	46.7	41.7	25.0	35.4	20.3
Valid Responses	30	24	28	96	59
Households with:					
Children					
Processed	60.0	45.7	37.2	50.0	-
Specialty	20.0	17.1	23.1	7.1	-
Cottage or Cream	30.0	31.4	44.9	28.6	-
Valid Responses	10	70	78	14	1
All Households					
Processed	67.5	56.4	57.5	44.5	38.3
Specialty	17.5	19.1	24.5	20.0	20.0
Cottage and Cream	42.5	34.0	39.6	34.5	20.0
Valid Responses	40	94	106	110	60

TABLE 50

Average Weekly Per Capita Expenditure on Cheese by Occupation and Age of Head of Household

(i) Occupation	Professional and Managerial	Clerical Sales and Service	Tradesmen and Labourer	Retired	Other
Households with:					
No Children					
1-2 occupants	82c (26)[a]	81c (29)	87c (33)	74c (75)	104c (6)
3-4 occupants	75c (12)	58c (17)	53c (13)	56c (6)	
Over 4 occupants	-	-	-	-	-
Children					
3-4 occupants	52c (21)	57c (33)	62c (44)	-	-
Over 4 occupants	55c (17)	51c (27)	48c (20)	-	
All Households	66c (77)	62c (106)	65c (112)	74c (83)	76c (18)

(ii) Age	Under 25 Yrs	25-34 Yrs	35-49 Yrs	50-64 Yrs	Over 64 Yrs
Households with:					
No Children					
1-2 occupants	81c (12)	109c (21)	69c (16)	89c (71)	67c (50)
3-4 occupants	53c (14)	-	69c (11)	50c (19)	-
Over 4 occupants	127c (3)	-	-	-	-
Children					
3-4 occupants	56c (7)	61c (47)	58c (38)	45c (9)	104c (4)
Over 4 occupants	52c (3)	46c (20)	57c (36)	37c (3)	-
All Households	68c (39)	69c (90)	61c (103)	76c (103)	70c (55)

[a] The numbers in brackets are the number of valid responses. Averages were not included when there were only several responses.

TABLE 51

Times of Day When Cheese is Served by
Occupation and Age of Head of Household

(i) Occupation	Professional and Managerial	Clerical Sales and Service	Tradesmen and Labourer	Retired	Other
	%	%	%	%	%
<u>Meal Times</u>					
Breakfast	27.8	27.7	25.0	11.1	33.3
Lunch	87.3	81.3	86.2	78.9	88.9
Evening Meal	32.9	43.8	31.9	37.8	50.0
<u>Non-Meal Times</u>					
Morning	50.6	51.8	58.6	55.6	61.1
Afternoon	53.2	65.2	73.3	70.0	72.2
Pre-dinner	39.2	36.6	41.4	28.9	50.0
Supper	77.2	78.6	79.3	60.0	94.4
Valid Responses	79	112	116	90	18

(ii) Age	Under 25 Yrs	25-34 Yrs	35-49 Yrs	50-64 Yrs	Over 64 Yrs
	%	%	%	%	%
<u>Meal Times</u>					
Breakfast	32.5	23.4	30.2	19.1	15.1
Lunch	90.0	88.3	87.7	80.9	66.7
Evening Meal	30.0	33.0	47.2	33.6	45.0
<u>Non-Meal Times</u>					
Morning	57.5	56.4	58.5	51.8	46.7
Afternoon	82.5	62.8	71.7	56.4	68.3
Pre-dinner	40.0	39.6	46.2	34.5	23.3
Supper	80.0	78.7	76.7	77.3	60.0
Valid Responses	40	94	106	110	60

TABLE 52

Ways Cheese is Used in the Preparation of Meals by Occupation and Age of Head of Household

Use	Professional and Managerial	Clerical Sales and Service	Tradesmen and Labourer	Retired	Other
	%	%	%	%	%
Cheese Salad in Summer	79.7	79.1	74.8	64.4	66.7
Grated and Sprinkled as Garnish	41.8	46.8	44.8	47.8	77.8
Cheese Sauce	35.4	40.2	36.8	23.6	44.4
With Eggs	25.6	24.1	29.3	27.0	33.3
With Vegetables	27.8	29.5	27.2	15.7	38.9
In Pizzas	25.6	23.4	23.3	6.7	23.5
In Baking	17.7	17.1	17.2	13.3	16.7
In a Fish Dish	12.7	15.3	10.3	4.4	16.7
Valid Responses	79	111	116	90	18

Use	Under 25 Yrs	25-34 Yrs	35-49 Yrs	50-64 Yrs	Over 64 Yrs
	%	%	%	%	%
Cheese Salad in Summer	85.0	76.3	74.3	75.2	61.7
Grated and Sprinkled as a Garnish	47.5	47.3	47.2	50.9	39.0
Cheese Sauce	35.0	31.9	41.3	36.7	21.7
With Eggs	30.0	25.5	26.7	29.1	25.4
With Vegetables	37.5	31.9	25.0	20.2	18.3
In Pizzas	20.5	21.5	31.4	12.7	8.5
In Baking	10.0	12.9	21.7	18.2	15.3
In a Fish Dish	12.7	15.3	10.3	4.4	16.7
Valid Responses	40	94	105	110	59

Note: The percentages are of those using cheese in that way at least once a week.

TABLE 53

Attitudes Towards Cheese by Occupation and Age of Head of Household

(i) Occupation Attitudes Statement	Professional and Managerial	Clerical Sales and Service	Tradesmen and Labourer	Retired	Other
	% agreeing	% agreeing	% agreeing	% agreeing	% agreeing
1. Cheese is a substitute for meat	50.6	45.0	55.7	58.9	66.7
2. Cheese is a substitute for eggs	67.1	47.7	57.4	55.6	55.0
3. Cheese is a substitute for puddings	69.6	66.7	52.2	64.4	55.6
4. A Cheese board completes a satisfying dinner	73.4	72.1	63.5	71.9	61.1
5. Cheese is good value for money	84.8	87.4	84.3	91.1	83.3
6. Too much cheese is bad for your health	38.0	26.4	27.8	22.2	44.4
Valid Responses	79	110	115	90	181

(ii) Age Attitude Statement	Under 25 Yrs	25-34 Yrs	35-49 Yrs	50-64 Yrs	Over 64 Yrs
	%	%	%	%	%
1. Cheese is a substitute for meat	40.0	48.4	54.7	56.9	56.7
2. Cheese is a substitute for eggs	42.5	49.5	60.4	57.8	58.3
3. Cheese is a substitute for puddings	52.5	63.4	62.3	67.0	55.0
4. A cheese board completes a satisfying dinner	40.0	72.0	67.0	75.2	76.3
5. Cheese is good value for money	77.5	87.1	82.1	93.6	86.7
6. Too much cheese is bad for your health	17.5	29.0	30.5	33.9	25.0
Valid Responses	40	93	105	109	60

Note: The percentages for statements 1 to 6 are for those households that "agreed".

TABLE 54

Attitudes Towards Cheese by Quantity Purchased

Attitudes Statement	Rare User	Light User	Medium User	Heavy User
	% agreeing	% agreeing	% agreeing	% agreeing
1. Cheese is a substitute for meat	38.7	54.4	56.7	52.5
2. Cheese is a substitute for eggs	48.4	52.3	61.6	57.4
3. Cheese is a substitute for puddings	54.8	58.4	66.5	63.9
4. A cheese board completes a satisfying dinner	74.2	64.2	70.1	78.7
5. Cheese is good value for money	93.5	84.6	86.6	88.5
6. Too much cheese is bad for your health	22.6	28.2	30.1	29.5
Valid Responses	31	149	163	61

Note: The percentages for statements 1 to 5 are for those households that "agreed" and the percentage for statement 6 is for those who "disagreed".

TABLE 55

Information Sources for Cheese
by Occupation and Age of Head of Household

(i) Occupation	Professional and Managerial	Clerical and Service	Tradesmen and Labourer	Retired	Other
Media	%	%	%	%	%
T.V. Advertising	87.3	81.6	79.3	73.5	66.7
T.V. Programmes	7.6	10.5	3.4	6.1	5.6
Radio	17.7	21.9	24.1	14.3	16.7
Magazines	19.0	14.0	8.6	4.1	22.2
Newspapers	17.7	21.9	12.1	10.2	11.1
In Store Displays	27.8	26.3	34.5	19.4	38.9
Valid Responses	79	114	116	98	18

(ii) Age	Under 25 Years	25-34 Years	35-49 Years	50-64 Years	Over 64 Years
Media	%	%	%	%	%
T.V. Advertising	80.0	90.4	77.6	74.6	72.3
T.V. Programmes	2.5	9.6	7.3	6.1	4.6
Radio	37.5	26.6	14.0	15.8	13.8
Magazines	10.0	13.8	15.0	8.8	6.2
Newspapers	20.0	17.0	13.1	16.7	9.2
In Store Displays	42.5	25.5	24.3	32.5	16.9
Valid Responses	40	94	107	114	65

Note: The percentages are for unprompted responses.

TABLE 56

Recall of T.V. Advertising
by Occupation and Age of Head of Household

(i) Occupation	Professional and Managerial	Clerical Sales Service	Tradesmen and Labourer	Retired	Other
	%	%	%	%	%
"Bruce Forsythe"	63.3	66.7	63.8	42.9	50.6
"Bigger Block"	32.9	31.6	34.5	37.8	22.2
"Family Block"	31.6	29.8	20.7	16.3	16.7
Valid Responses	79	114	116	98	18

(ii) Age	Under 25 Years	25-34 Years	35-49 Years	50-64 Years	Over 65 Years
	%	%	%	%	%
"Bruce Forsythe"	57.5	63.8	68.2	60.5	30.8
"Bigger Block"	30.0	29.8	29.0	36.8	36.9
"Family Block"	35.0	29.8	27.1	16.7	18.5
Valid Responses	40	94	107	114	65

Note: The percentages are for total unprompted recall.

TABLE 57

Awareness of Family Block Sticker by Quantity of Cheese Bought and Hours of T.V. Watched per Day

(i) Quantity of Cheese Bought	Rare User	Light User	Medium User	Heavy User
Aware of:	%	%	%	%
Old Label only	30.0	46.6	43.8	51.7
Both Labels or New Label	46.7	41.9	44.4	27.8
Neither	23.3	11.5	11.9	22.4
	100.0	100.0	100.0	100.0
Valid Responses	30	148	160	58

(ii) Hours of T.V. per Day	1 Hour or less	2 Hours	3 Hours	4 Hours or more
Aware of:	%	%	%	%
Old Label only	48.9	45.1	45.7	32.3
Both Labels or New Label	32.6	46.1	40.7	51.6
Neither	18.5	8.8	13.6	16.1
	100.0	100.0	100.0	100.0
Valid Responses	92	113	81	93

TABLE 58

Knowledge of Family Block Sticker by
Occupation and Age of Head of Household

(i) Occupation	Professional and Managerial	Clerical Sales Service	Tradesmen and Labourer	Retired	Other
Estimated Weight	%	%	%	%	%
Less than 900 gm	24.1	24.8	32.8	26.1	16.7
900 gm	21.5	33.0	19.8	26.1	33.3
1 Kilo or more	11.4	12.8	17.3	7.9	5.6
Don't know	43.0	29.4	30.2	39.8	44.4
	100.0	100.0	100.0	100.0	100.0
Valid Responses	79	109	116	88	18

(ii) Age	Under 25 Years	25-34 Years	35-49 Years	50-64 Years	Over 65 Years
Estimated Weight	%	%	%	%	%
Less than 900 gm	32.6	23.9	28.3	24.8	24.1
900 gm	22.5	25.0	26.4	27.5	25.9
1 Kilo or more	10.0	21.7	5.7	14.7	6.8
Don't know	35.0	29.3	39.6	33.0	43.1
	100.0	100.0	100.0	100.0	100.0
Valid Responses	40	92	106	109	58

TABLE 59

Knowledge of Family Block Sticker by
Quantity of Cheddar Bought and
Hours of T.V. Watched per Day

(i)	Quantity Estimated Weight	Rare User %	Light User %	Medium User %	Heavy User %
	Less than 900 kg	25.8	23.6	31.9	25.0
	900 kg	22.6	27.7	25.2	25.0
	1 Kilo or more	9.7	12.1	12.9	15.0
	Don't know	41.9	36.5	30.1	35.0
		100.0	100.0	100.0	100.0
	Valid Responses	31	148	63	60
(ii)	Hours of T.V. per day Estimated Weight	1 Hour or less %	2 Hours %	3 Hours %	4 Hours or more %
	Less than 900 kg	28.7	28.9	26.5	22.1
	900 kg	21.3	26.3	28.9	29.5
	1 Kilo or more	13.8	7.1	17.1	13.7
	Don't know	36.2	37.7	26.5	36.7
		100.0	100.0	100.0	100.0
	Valid Responses	94	114	83	95

APPENDIX 9

A Comparison Between the 1972 Massey University and the 1979 Lincoln Results[a]

TABLE 60

Attitudes: A Comparison Between the 1972 and 1979 Survey Results

Ranking	"Cheese is a Substitute for Meat"		"Cheese is a Substitute for Eggs"		"Cheese is Good Value for Money"	
	1972 %	1979 %	1972 %	1979 %	1972 %	1979 %
1. Agree strongly	13	12.2	11	7.9	33	20.6
2. Agree	24	40.8	28	47.7	42	65.9
3. Undecided	8	8.4	14	14.4	10	8.6
4. Disagree	23	32.6	29	26.1	9	3.6
5. Disagree strongly	32	6.0	19	3.8	6	1.2
	100	100.0	100	100.0	100	100.0
Agree (1 + 2)	35	53.0	39	55.6	75	86.6
Disagree (3 + 4)	55	38.6	48	29.9	15	4.8

1972	1979	1972	1979
"I prefer cheese to pudding as a desert"	"Cheese is a substitute for for pudding"	"Cheese is too fattening"	"Too much cheese is bad for your health"
%	%	%	%
16	8.6	6	3.6
11	53.5	9	25.5
9	8.4	18	18.2
23	25.2	28	36.1
41	4.3	39	15.6
100	100.0	100	100.0
35	62.1	15	29.1
65	29.5	67	51.7

[a] "A Consumer Study of the Domestic Cheese Market", Consumer Research Report No. 4, 1973, Market Research Centre, Massey University. The Massey survey results were based on a sample of 1,022 New Zealand households.

TABLE 61

Buying Patterns: A Comparison Between
1972 and 1979 Survey Results

	1972	1979
(i) Types of Cheese Bought in Last 6 Months	% Households	% Households
Cheddar - Mild	77	56.5
- Medium	-	27.5
- Tasty	58	53.2
Colby	27	26.0
Processed - Plain	59	44.1
- Smoked	20	32.9
- Flavoured	-	38.5
Blue Vein	16	20.6
Camembert	-	3.2
Cheshire	3	2.1
Danbo	3	4.3
Edam	-	3.1
Erbo	3	2.4
Fetta	3	5.7
Gauda	4	6.7
Gruyere	4	9.3
Havart	2	0.4
Parmesan	-	11.5
Romano	0	1.7
Cottage	17	47.8
Cream	18	32.5
(ii) Imported Cheese		
Bought in last:	17 (1 yr)	15 (2 yrs)
(iii) Frequency of Buying		
more than once a week	8	4.1
once a week	51	46.2
2 weeks	19	30.0
3 weeks - 1 month	15	16.1
longer	7	3.6
	100	100.0

(iv) Outlet Used	Total %	Christchurch %	%
Supermarket	58	56	86
Grocer	32	42	16
Dairy	6	12	9
Delicatessen	3	4	4
Wholesaler	3	8	5
Cheese Factory	11	3	11

TABLE 62

Consumption Patterns: A Comparison Between
1972 and 1979 Survey Results

	1972[a] %	1979[b] %
(i) Times of day when cheese served		
Meal Times: Breakfast	33	23
Lunch	74	81
Evening Meal	44	36
Non-meal Times: Morning	61	53
Afternoon	50	65
Predinner	-	36
Supper	58	73
Cheese in Cut Lunches	64	56
(ii) Ways household has served cheese		
Snacks: On its own	86	84.6
With bread	87	76.7
With biscuit		90.7
Toasted or grilled	84	93.3
In Meals: Cheese salad	81	84.4
Grated sprinkled as garnish	65	79.4
Cheese sauce/with pasta	49 (cheese sauce only)	79.3
With eggs	44 (omelettte only)	76.0
Cooked with vegetables	44	58.9
In pizzas	-	67.0
In baking	61	63.1
In fish dish	37	48.7

[a] Served in last 6 months.

[b] Served in the last year.

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