



Sea of Change

A unique insight into the UK foodservice industry's attitude and behaviour with regard to sustainable fish & seafood

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M&Jseafood
fresh fish specialist





Introduction

Responsible sourcing is becoming of increasing importance in the UK foodservice industry and with consumers alike. So with seafood demand and consumption growing, we all have to look at ways of protecting the world's natural reserves. With chefs being in the unique position of being able to affect critical change in our eating habits, it is vital that they are armed with the knowledge and tools needed to in turn educate their customers.

M&J Seafood, Brakes fresh fish specialist business, has made adopting and championing responsible and sustainable sourcing one of its core objectives. Keen to gain a better understanding of the opinions and behavioural patterns of British operators as well as how strong consumer demand is for ethically sourced products, M&J commissioned independent research to be conducted within the out of home market.

Offering a snapshot into industry and consumer trends, the report also gives statistical information on a broad range of areas. Exploring operators' understanding of sustainability, it also looks at how they encourage consumer uptake and the prominence and use of underutilised species on menus.

Quantitative telephone interviews were conducted in August 2008 by independent research consultancy Cambridge Direction from a list of almost 300 caterers ranging from workplace contract caterers, hoteliers through to publicans and restaurateurs. In addition to providing a direct comparison, an online survey was conducted amongst its customers by M&J Seafood at the same time. Covering a total sample in excess of 500 operators Sea of Change is therefore independently validated.

Market channel key:

Hotels

Workplaces

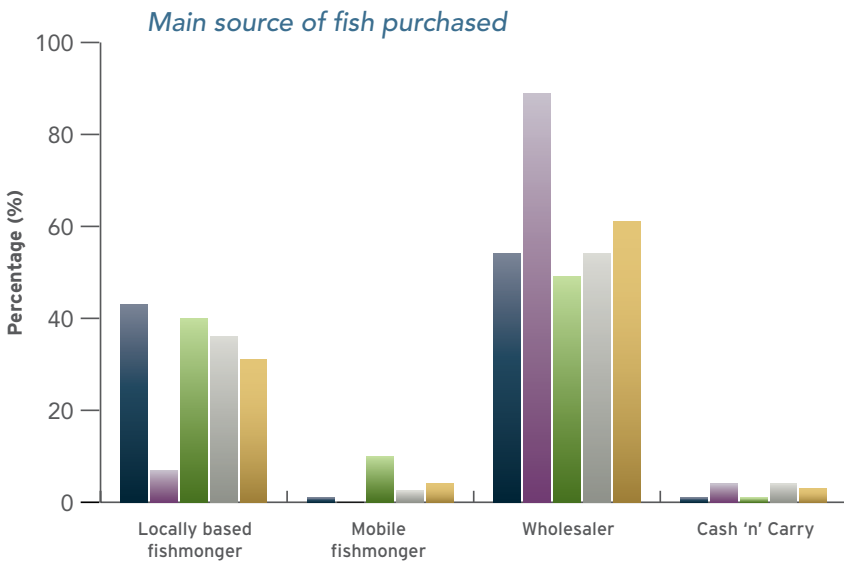
Restaurants

Pubs

Total

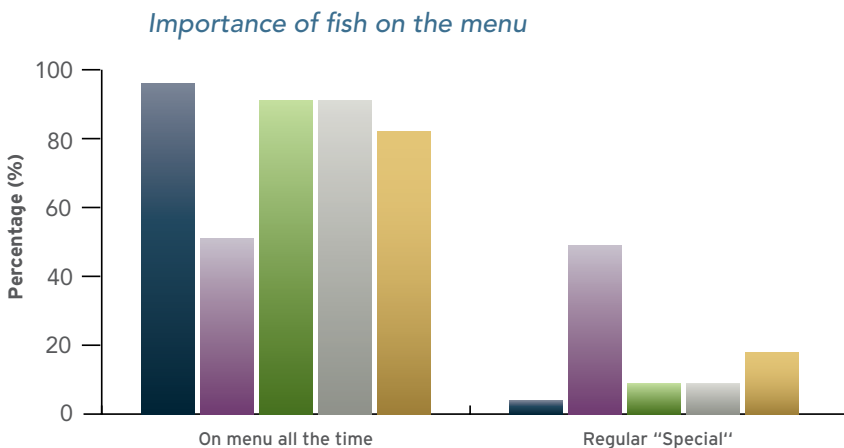
Operator habits and practices

A majority of 61% of those sampled said that they purchased most of their fish and seafood from wholesalers. Underlining the importance of traceability and trust, it demonstrates that operators are putting consumer confidence and supply chain integrity at the heart of their business.



Fish and seafood consumption is growing in the UK, thanks partly to initiatives like the Food Standards Agency's recommendation to eat a minimum of two portions a week.

With out of home consumption levels accounting for 18% of meals compared to just 8% in home*, over 90% of hotels, restaurants and pubs surveyed had fish on the menu all of the time, while only 51% of workplaces did due to them favouring its use on specials boards instead.



* Source: Seafish

The respondents were also asked whether they bought fresh, fresh and frozen or just coated fish products. Fresh whole and filleted fish proved the most popular temperature format with 59% of the total sample citing it as first choice. 35% across all channels claimed to buy a combination of fresh and frozen, while workplace caterers were the most likely to buy the fresh/frozen mix at 51.5%. Coated products show a clear decline in their use on British menus.

Sustainability and the marketplace

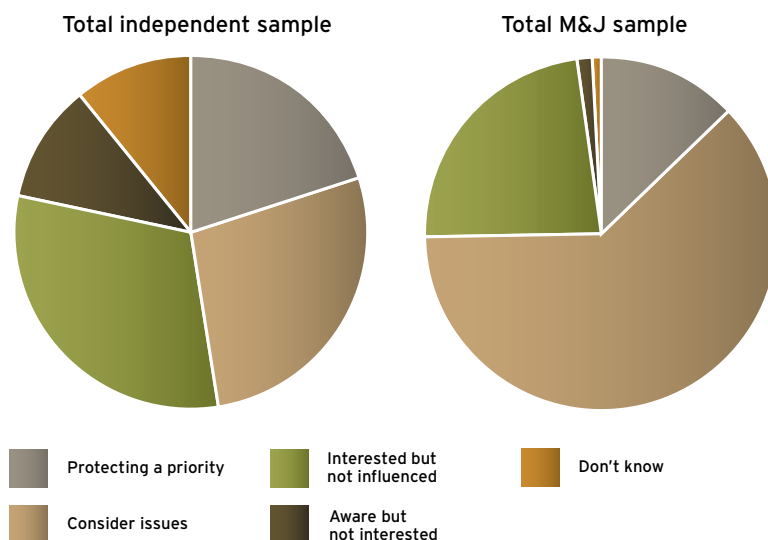
1. Influence of Environmental Issues on Purchasing Decisions

All respondents were asked if environmental issues around fish and seafood were a factor in their decision making when buying produce.

61.8% of all M&J customers cited that environmental issues do influence their buying decisions, while the majority of non M&J customers claimed to be interested but that it had little impact on their purchasing.

Hotels and restaurants were most likely to state that protecting the environment was a priority at 26% and 27%.

Are environmental issues around fish and seafood a factor in your decision making?



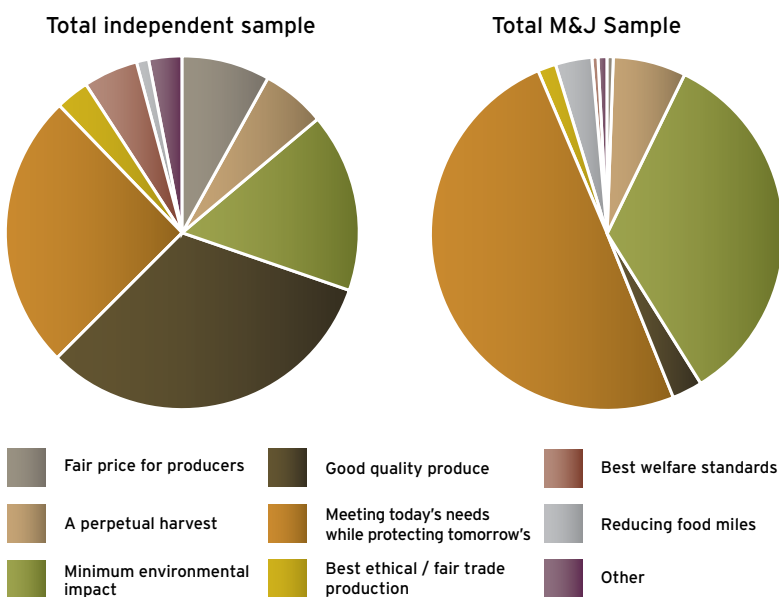
2. Understanding of Sustainability

All participants were asked what their understanding of the term sustainability was. Of the nine possible meanings read to them, they were also invited to give their own definition.

32% – the majority of non M&J customers surprisingly associated good quality produce with sustainability. Restaurants and hotels being the most likely channels to say this at 39% and 37% respectively. 25% of the sample chose meeting today's needs while protecting tomorrow's, with pubs choosing this answer most frequently at 30%.

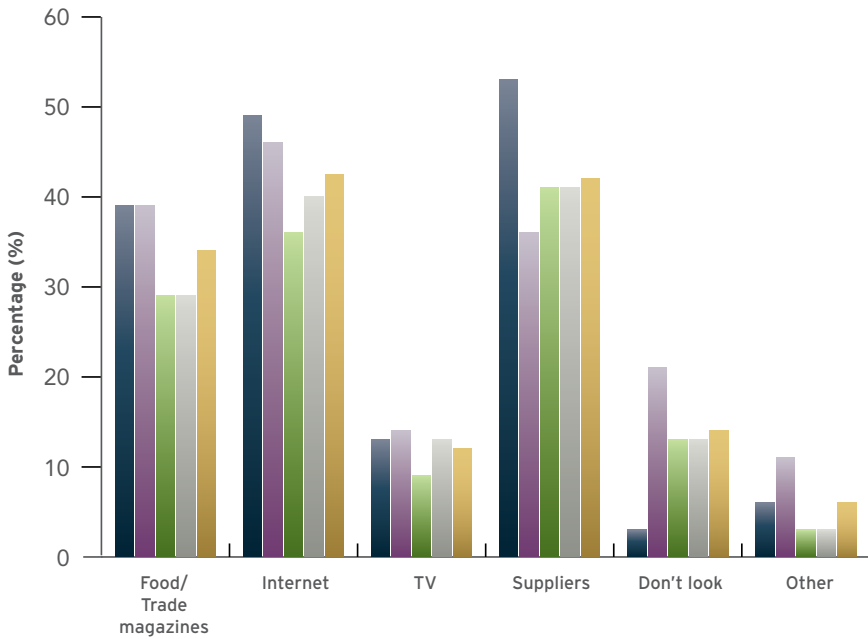
M&J customers demonstrated that they have come to expect good quality as standard as 49.6% of them cited protecting tomorrow's needs as number one, while good quality produce only accounted for 2.8% of replies. 33.9% chose minimum environmental impact as the second most popular meaning.

What do you understand by the term sustainability?



3. Sources of Information

Where do you look for information on whether a species you want to use is sustainable or not?

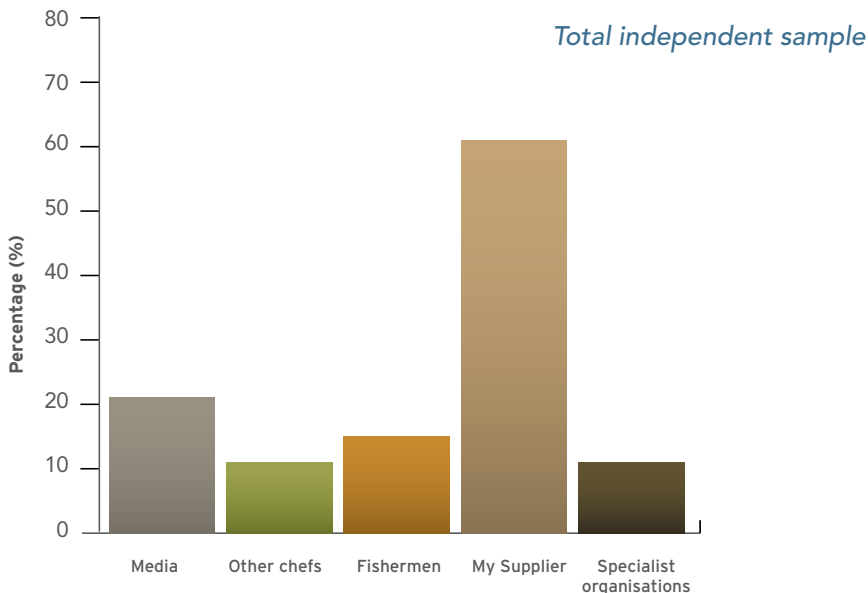


All participants were asked where they look for information on whether or not a species they want to use is sustainable or not.

Across the independent sample suppliers and the internet were the preferred sources of information.

M&J customers backed up these findings with the majority favouring their supplier, followed by the internet and then food and trade publications.

Who do you trust to give you information on the best sustainable choices?



All respondents appeared to be aware of the environmental issues surrounding the fishing industry with only 11% admitting lack of knowledge.

Asked whom they most trusted to give information on the best sustainable choices, a majority of 61% independent respondents chose 'my supplier'. This was supported by 85.8% of M&J customers.

Of the non M&J customers, the least informed channel – pubs – was most likely to trust their supplier at 69%; demonstrating a strong reliance on their supply chain network. Restaurants were least likely at 50%.

There is evidence of a lack of trust for peers and specialist bodies with only 11% trusting other chefs, 15% fishermen and 11% specialist organisations.

Fish on the menu



"From our perspective and recently when we were promoting Seafood Fortnight, it is not only important for chefs to use sustainable seafood, but essential too. It is most essential that chefs take the lead in educating their diners in eating and consuming not only sustainable seafood, but also to be more British in their choice and be assured that we in Britain are at the very forefront of conservation and protection.

"Chefs need to experiment their own personal styles with the various fish available in the UK, which are fabulous once you get it right. Species such as gurnard, herring, mackerel, sardines, Cornish albacore tuna and many, many more can add very good value to your menus & in fact help you achieve better margins.

"Like the Mutton Renaissance campaign, which has had a huge impact on the consumption of mutton nationally, it is chefs who must take the lead to educate the masses. We have the knowledge to do so and people believe it for sure when chefs say it because it gives them greater confidence!"

Cyrus Todiwala
 MBE, executive chef & patron,
 Café Spice Namasté, London

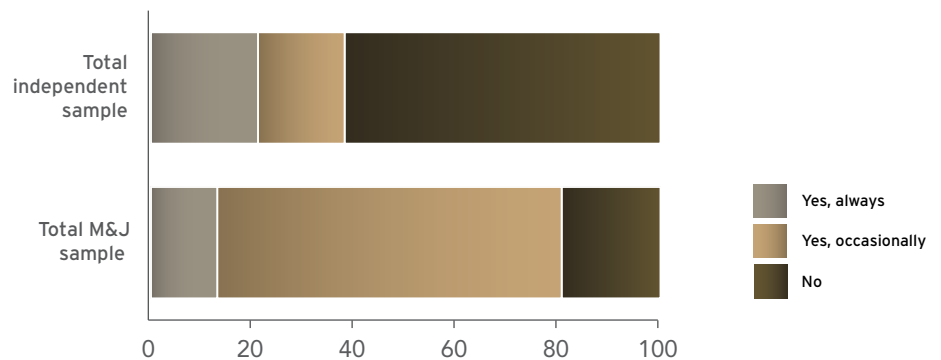
4. Communicating with the Customer

Respondents were then asked if they ever included information on their menus about where their fish is from, how it was caught etc.

Two thirds didn't add any references to their menus while a fifth did. Of M&J's customers 67.6% occasionally did, while 19.4% didn't.

Apathy was the number one reason given by independent respondents with 18% saying 'just never done it', 'no reason' and 'no need'. 8% cited lack of space on menus, while M&J customers listed this and their preference to speak to customers personally as their main reasons.

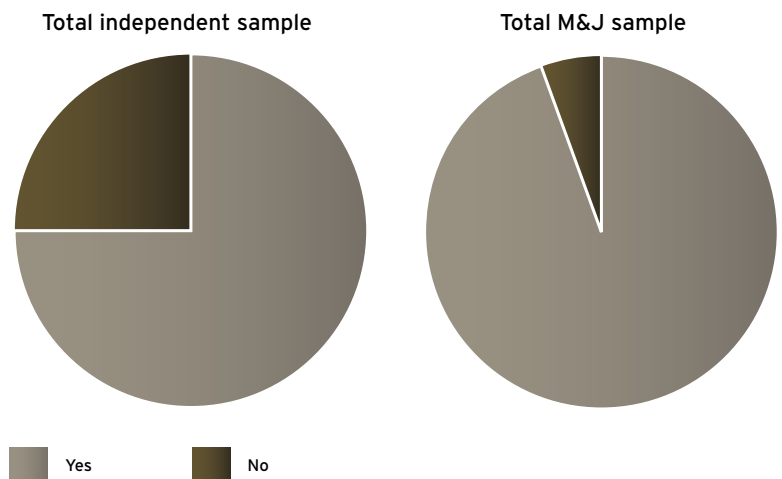
Do you ever include information on your menu about where your fish is from, how it is caught or what measures are in place to ensure the fishery is well managed?



5. Adding Value to Your Menu

Then asked if they knew adding such information would add value to their business and customers' experience, three quarters said they would add something to their menus as did 94.5% of M&J customers.

If you knew adding such information to your menu would add value to your business and your customers' experience, would you consider including it?



6. Understanding Consumer Trends

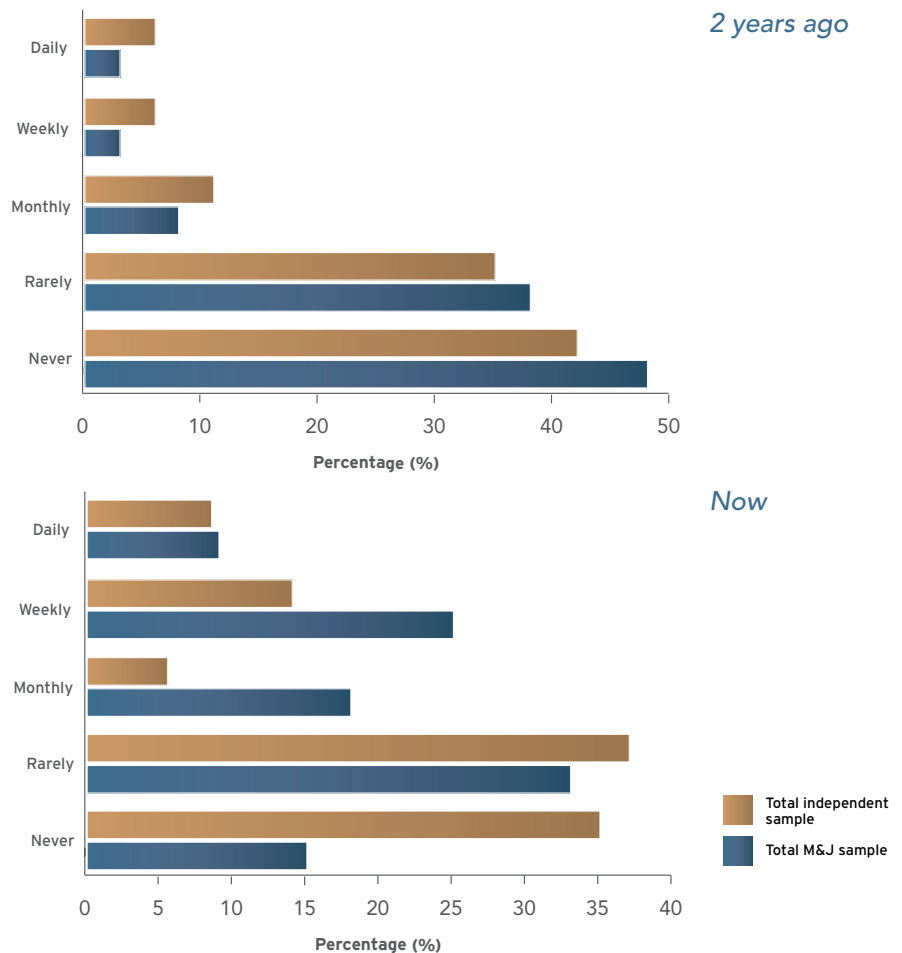
All respondents were asked how much consumer attitudes had changed in the last two years. Asked how often their customers quiz them about the sustainability of fish and seafood on their menus, there is a definite emerging trend demonstrating increasing consumer awareness and concern.

Hotels, restaurants and pubs all reported an increase in receiving daily and weekly queries, while workplace caterers experienced a smaller rise. M&J customers reported a significant rise too reflecting that consumer interest is growing consistently.

Research shows that today's consumer has a great deal of trust that their food suppliers (retail and foodservice) are doing the right things for them. In fact, when eating out 55% of consumers expect their fish to be sustainable.

Source: Seafish study of 1006 consumers, 2007

Approximately how often do your customers ask questions about the sustainability of fish and seafood on your menu. Now and 2 years ago?



“Overfishing is one of the most important issues of our time. It has been described as the second biggest sustainability challenge we face – second only to climate change. As diners become increasingly eco-savvy and question the provenance and sustainability of the fish options on menus, restaurants are responding with promises to only provide sustainable fish – but how can they be sure it’s from environmentally sound sources?”

“For those restaurants that want independent proof of sustainability and ocean-to-plate traceability, Marine Stewardship Council certified seafood offers the best environmental choice. The MSC logo on your menu will show your customers that the seafood you

are serving can be traced back to the independently-certified sustainable fishery that caught it. In order to complete the ‘chain of custody’ along the entire supply chain, every restaurant that carries the prestigious logo has to be certified to prove that MSC fish is kept separate from non-MSC fish and that good records are being kept. Once certified, you can show the logo next to your MSC fish dishes on the menu assuring your customers that you – and they – are doing everything you can to be part of a global solution to the problems of overfishing.”

For more information, please visit www.msc.org.



The Marine Stewardship Council (MSC)

The MSC is an independent, non-profit organisation that promotes sustainable fisheries by using an eco-label to identify seafood products certified to its environmental standards.

The MSC programme accounts for 42% of the wild salmon global catch and 32% of the prime whitefish catch (cod, pollock, hake, hoki and coley). In total about 8% of the world’s edible wild capture (over 5 million tonnes) is part of the programme.

Laura Stewart – foodservice and Scotland manager at MSC explains:

Underutilised species on the menu

7. Trialling New Fish Dishes

While cod, haddock, salmon and sea bass are all regular fixtures on British menus, M&J was keen to find out what the level of uptake was on less familiar species such as gurnard and albacore tuna.

All respondents were asked if they had tried specific unfamiliar species on their menus.

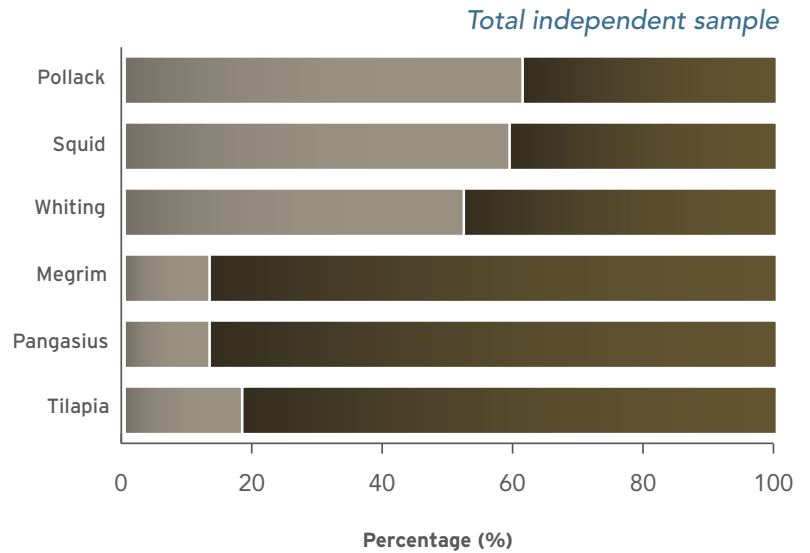
There was a good degree of trial for some species including pollack at 61%, squid at 59% and whiting at 52%. 82% of M&J customers had tried squid on their menus, followed by pollack at 81% and grey mullet at 62%.

The least tried species were megrim and pangasius at 87%, tilapia at 83%. M&J customers ranked megrim, albacore tuna and gurnard as the least used species with 66%, 63% and 60% in that order.

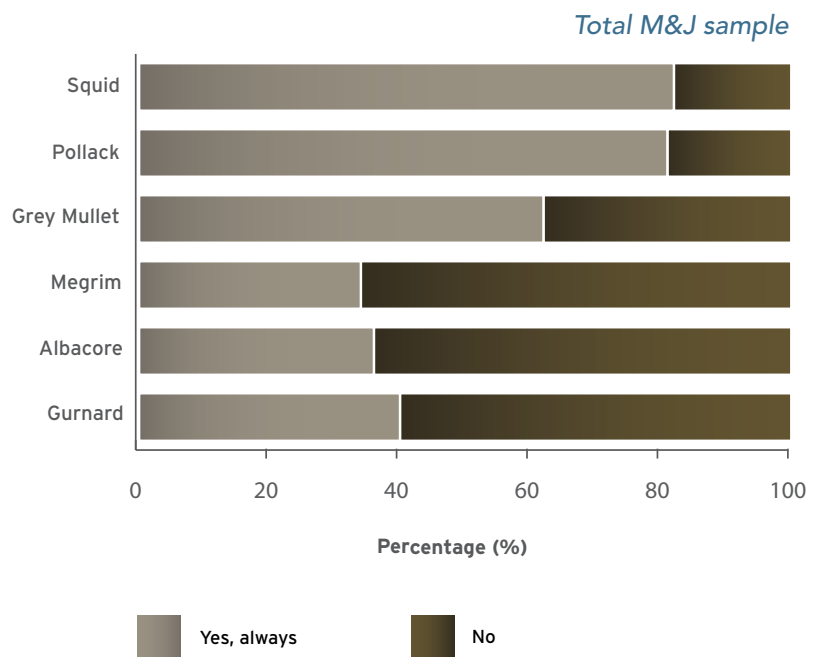
Experimental customers were viewed as being very important with 14% of the sample putting the success of trying new species on their menus down to their customers liking to try new things. Effective marketing was cited by 7% and staff training by 4%. M&J customers felt that well briefed staff and promotional marketing were the two most effective methods of encouraging customers to try alternative species.

An amazing third of those surveyed by Cambridge Direction said they had not tried new fish on their menus.

Have you tried any of these less familiar species on your menus?



Have you tried any of these less familiar species on your menus?



Ways to market

8. Tips for Front of House

Those surveyed were then asked about what methods could help them best sell more sustainable/unfamiliar species to their customers.

77% of the total independent survey believed that well briefed and clued-up staff were vital to them helping sell more sustainable/unfamiliar species. This was again reflected by M&J customers with 72.6% stating that it was the most effective way of influencing customer decisions.

In what ways do you think you could be best helped to sell more sustainable and/or unfamiliar species to your customers?

Total independent sample

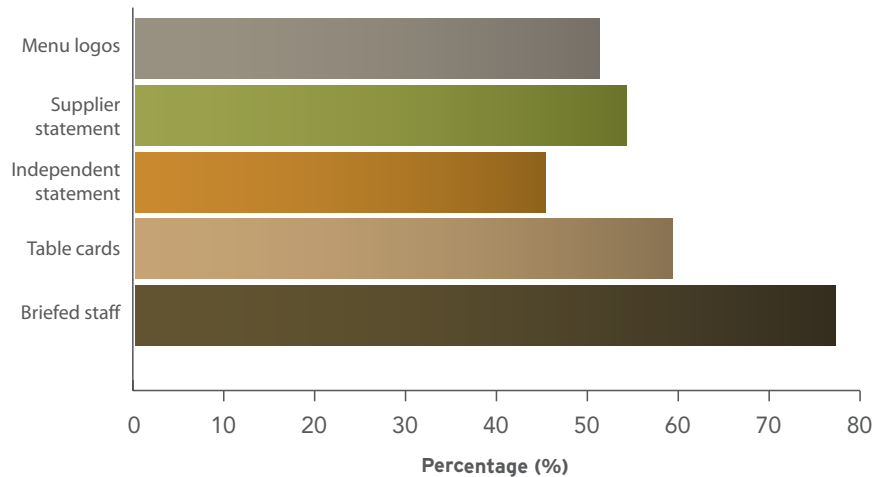


Table cards were found to be the second most successful means by which operators could 'reach' their guests. Just under 60% of independent respondents and 57.1% of M&J customers cited that specials boards and other POS materials were effective aids in communicating with customers.

Of those respondents who answered 'Other', there was a clear eagerness from non M&J customers for more support from their suppliers. While the most common other suggestion reinforced the need for good training and educating of both serving staff and chefs.



Recommendations for working towards a sustainable future

As consumers become increasingly aware of sustainability issues regarding fish and seafood, they are expecting supermarkets and restaurants to be able to provide reassurance and offer solutions. With 89% of the surveyed agreeing with this statement, it is clear that operators need to take responsibility NOW for promoting and supporting sustainable sourcing.

Collectively we need to start taking action now and educate not only our customers, but also our own sector and peers. The role of the wholesaler/ foodservice supplier and the part they play in educating the operator cannot be underestimated. The supermarkets are a good example of what can be achieved by working with suppliers to influence the consumer. M&J takes this role very seriously and as the results of this survey highlight, raising the operator's awareness and understanding of these issues, we can help them achieve business growth and success.

With commercial benefits to be gained by supporting sustainable and underutilised species, this is a good opportunity to help develop a more environmentally responsible future for the entire foodservice industry.

There is still a long way to go though.

Specific messages for individual channels

Pubs

Claim to consider issues when menu planning but score lowest on how much they admit to knowing about the sustainability issues surrounding fish and seafood.

Restaurants

Most likely to take strong environmental view and change purchasing habits especially as they have experienced the largest rise in customers asking about sustainable sourcing (17-35% in two year period).

Hotels

Most likely to rely on their suppliers for information and most eager to add information to their menus to add value to their business and customers.

Workplaces

Very interested in environmental issues but not in a position to change purchasing decisions due to being controlled from head office and tied into restrictive contracts.

9. Recommendations for a Sustainable Future

Aware of environmental issues, but little influence on purchasing decisions

- 61.8% of M&J customers make purchases based on external influences, while majority of non M&J customers don't.
- Very small proportion of sample (11%) claim to know little about environmental issues – showing awareness is growing.

Strong misunderstanding of what sustainability really means

- A third equated it to mean good quality produce, while just 2.8% of M&J customers demonstrated lack of knowledge.
- Two thirds claimed to have good grasp of sustainability issues facing industry – danger here that caterers believe that they already know the facts – more needs to be done to educate our peers.

Strong reliance on suppliers

- Suppliers held up as most trusted source of information across total sample.
- Demonstrates that operators are open to direction from trusted sources – natural opportunity to deliver change here.
- Internet popular port of call – evidence that operators can be influenced through better use of internet communication.

More awareness of the commercial benefits ethical sourcing can bring is needed to stimulate action

- High level of apathy amongst sample despite evident upward trend in consumers asking more searching questions when dining out.
- More than three quarters would add information to their menus in the knowledge it would add value to their business/customer – need to appeal to pockets and minds through inspiration and motivation.

Championing ethical sourcing doesn't mean extra expense and is more than just buying sustainably certified species

- Need to dispel fear of the unknown – operators need to be coached on alternative species and what they can bring to the menu over species facing extinction.
- Opportunity to champion British produce while highlighting savings caterers can make when choosing alternative species.

Operators need to be empowered to shift consumer attitudes

- Caterers need to be given the tools to in turn educate the dining public – onus on suppliers to help train operators to influence customer decisions.



About M&J Seafood

Established in 1978, M&J Seafood offers the widest range of fresh and frozen seafood in the UK foodservice market today. From its network of 14 branches placed throughout the UK, M&J is able to provide a high quality bespoke service.

The combination of its local branches and the UK's largest range of fresh, frozen and chilled seafood products enables M&J to offer first class local service to over 13,000 chefs nationwide - whatever the requirement. Its varied customer base includes: restaurants, hotels, pubs, contract caterers, education and quick service restaurants as well as fishmongers and other wholesalers.

Committed to the use of sustainable seafood within foodservice, M&J Seafood goes to great lengths to support and promote sustainable and ethical sourcing and champion the use of underutilised species. Mike Berthet, group director of fish and seafood at M&J has been responsible for spearheading its efforts to drive awareness and change with his team:

"While retailers come under public and NGO scrutiny for their sourcing and sustainability, suppliers into the foodservice market are relatively unknown and un-challenged in their policies, which makes them less-inclined to action and promote change.

"We're something of a lone-figure in taking steps towards raising the profile of sustainability issues in the catering sector, engaging with NGOs, and actively promoting positive change through to the customer. At M&J we believe chefs and suppliers have an enormous role to play in supporting the sustainable management of our fish stocks, and as suppliers we are in a prime position to educate them.

"Sustainability is at the heart of everything that we do at M&J. We very much see chefs as the gatekeepers of the seafood industry and we as suppliers, are the locksmiths. It's our responsibility to provide the support that chefs need to make informed, sustainable choices, and drive uptake amongst consumers. If we give them the knowledge and tools they need to educate their customers, then we can help slow down and reverse over fishing and bring commercial benefits to all."

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