



agriculture, nature
and food quality



The consumer's perspective

Jonathan Banks

Wednesday 22 April

10.05 – 10.30



Confidential & Proprietary • Copyright © 2008 The Nielsen Company

The consumer's perspective

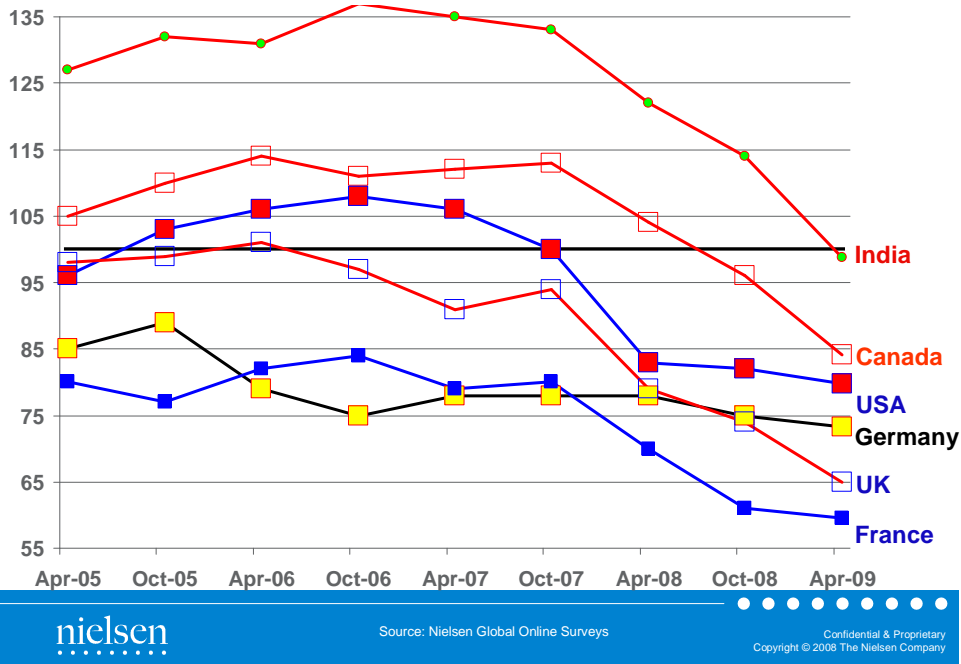
- The recession
- Consumer concerns
- Consumer attitudes to fish
- What's next?

nielsen

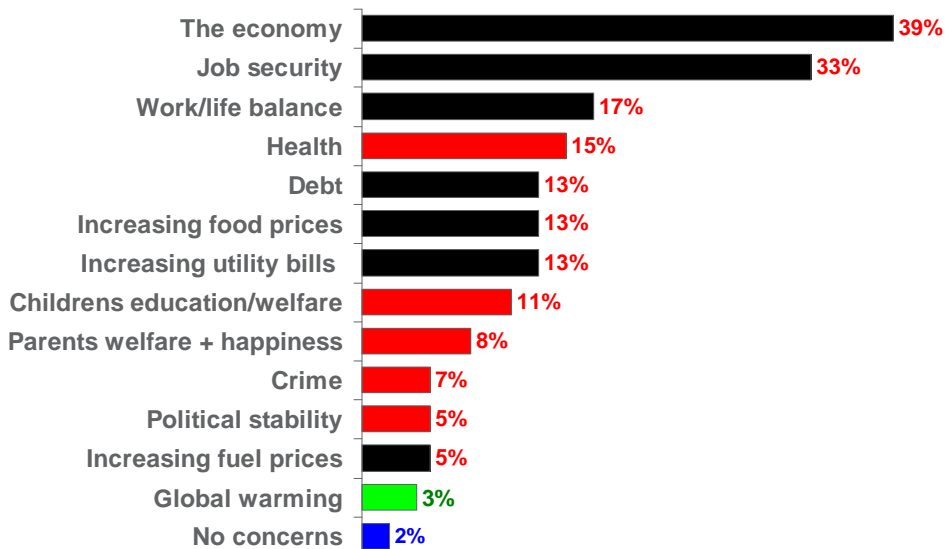


Confidential & Proprietary
Copyright © 2008 The Nielsen Company

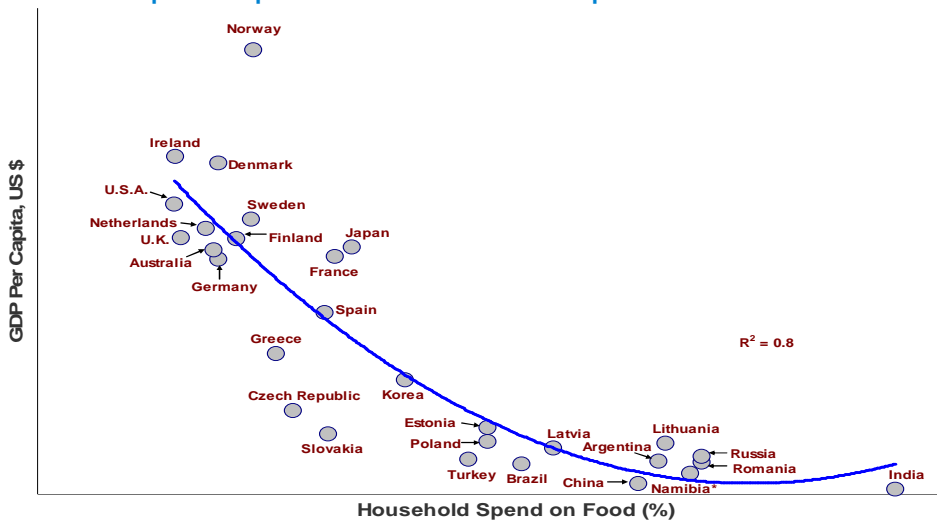
Consumer confidence index



Biggest+2nd biggest concerns in next 6 months



GDP per capita vs. Household spend on food

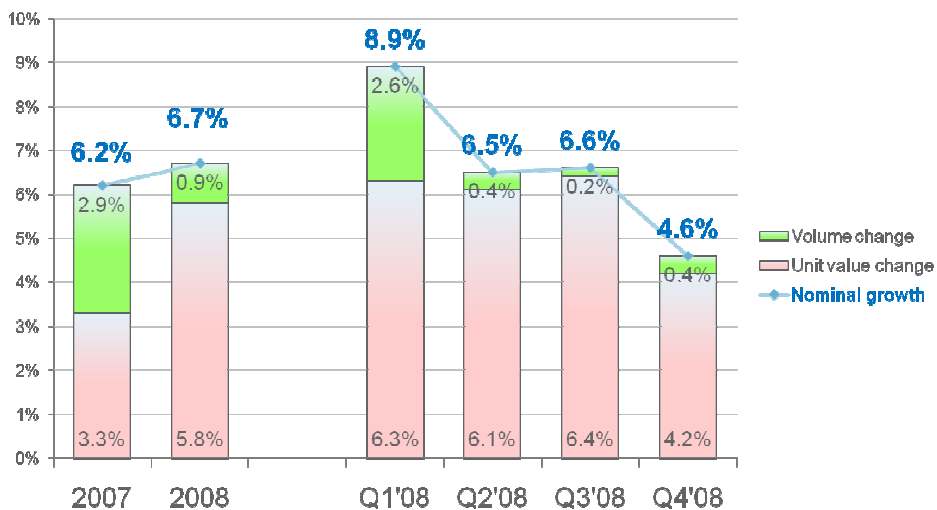


nielsen

Sources: UN; International Labour Organization; allcountries.org; National Bureau Of Statistics of the The Peoples Republic Of China; swivel.com; World Resources Institute; International Finance Corporation

Confidential & Proprietary
Copyright © 2008 The Nielsen Company

Fast Moving Consumer Goods market dynamics: Total Europe



nielsen

Source: Nielsen 2008

Confidential & Proprietary
Copyright © 2008 The Nielsen Company

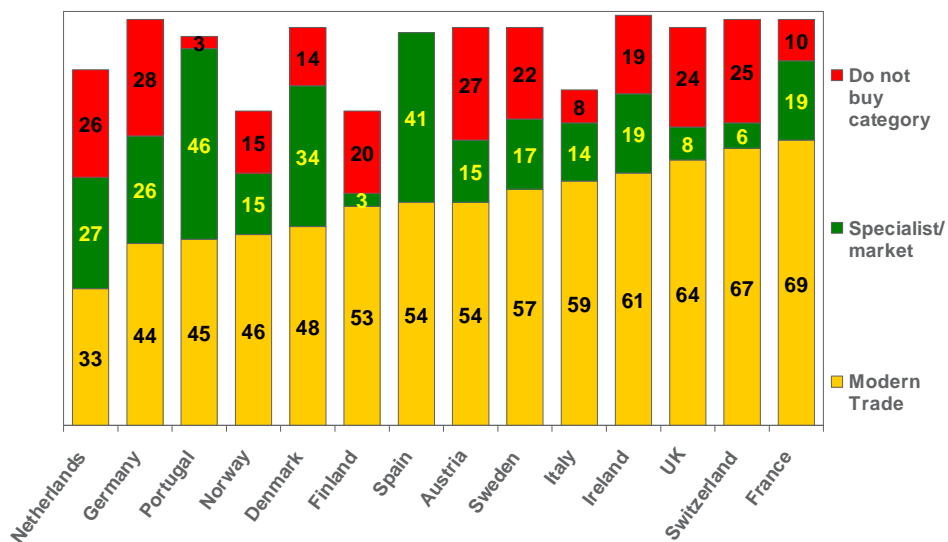
European retail trends

- The recession
- **Retail developments**
- Consumer attitudes to fish
- What's next?

nielsen

Confidential & Proprietary
Copyright © 2008 The Nielsen Company

Europe: Where is fish mainly purchased?

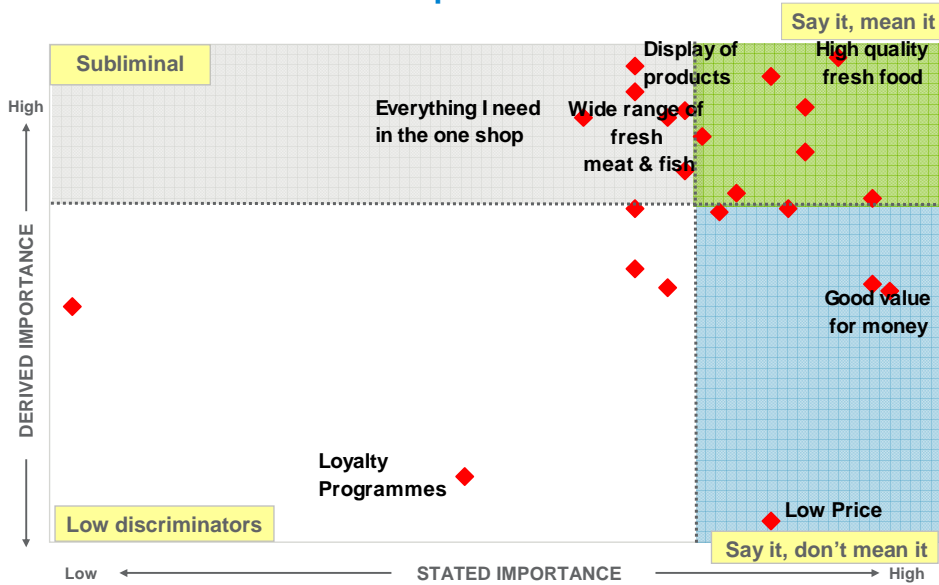


nielsen

Source: Nielsen ShopperTrends 2008

Confidential & Proprietary
Copyright © 2008 The Nielsen Company

Great Britain: Importance of Attributes

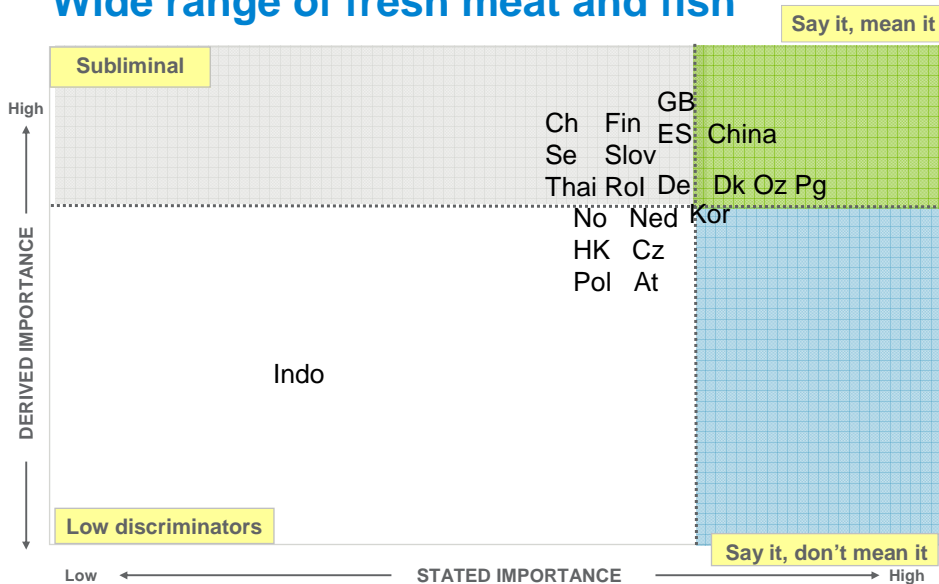


nielsen

Source: Nielsen ShopperTrends 2009

Confidential & Proprietary
Copyright © 2008 The Nielsen Company

Wide range of fresh meat and fish



nielsen

Source: Nielsen ShopperTrends 2009

Confidential & Proprietary
Copyright © 2008 The Nielsen Company

European retail trends

- The recession
- Retail developments
- **Consumer attitudes to fish**
- What's next?

nielsen

Confidential & Proprietary
Copyright © 2008 The Nielsen Company

Which of these products do you actively try to buy?

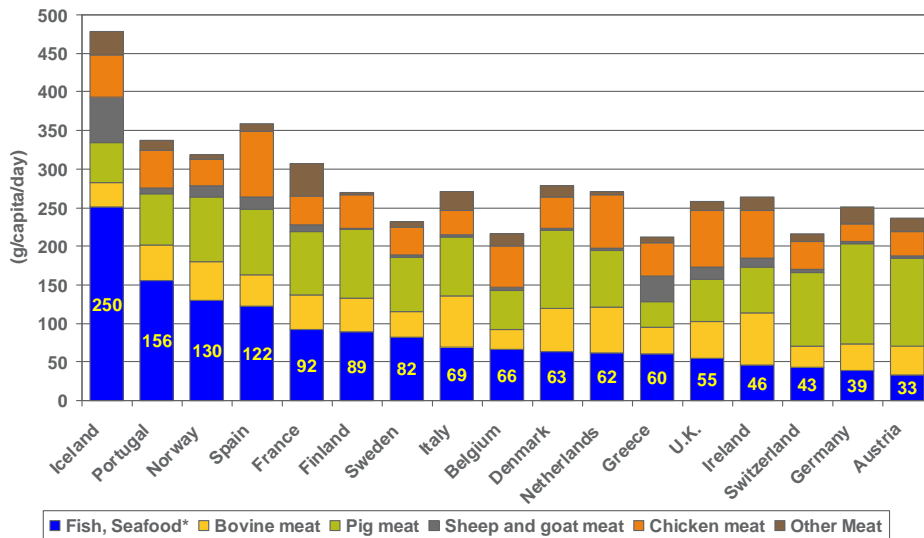


nielsen

Source: Nielsen Global Online Survey
March 2009. 25420 consumers in 50 countries

Confidential & Proprietary
Copyright © 2008 The Nielsen Company

Animal products per capita consumption



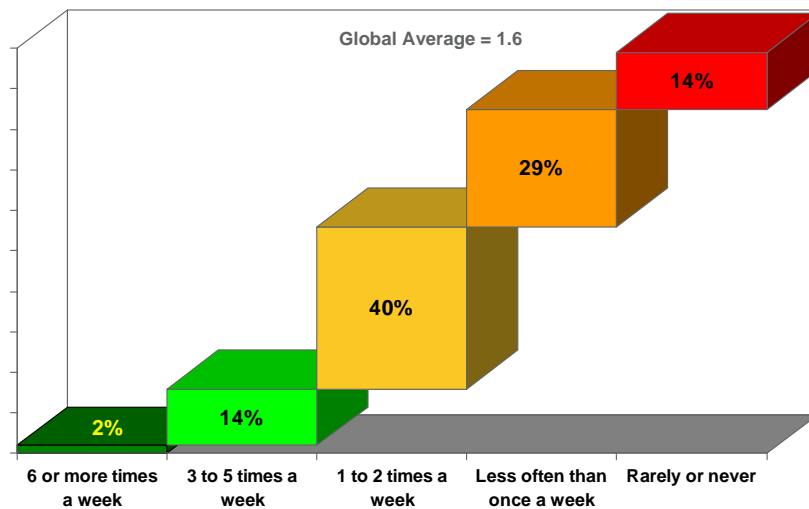
*Includes Cephalopods; Crustaceans; Demersal fish; Freshwater fish; Large Pelagic fish; Marine fish, other; and Molluscs

nielsen

FAOSTAT; FAO Statistics Division 2007

Confidential & Proprietary
Copyright © 2008 The Nielsen Company

On average, how often do you eat fish (including seafood)?



nielsen

Source: Nielsen Global Online Survey
~28k consumers in 51 countries

Confidential & Proprietary
Copyright © 2008 The Nielsen Company

On average, how often do you eat fish (including seafood)?



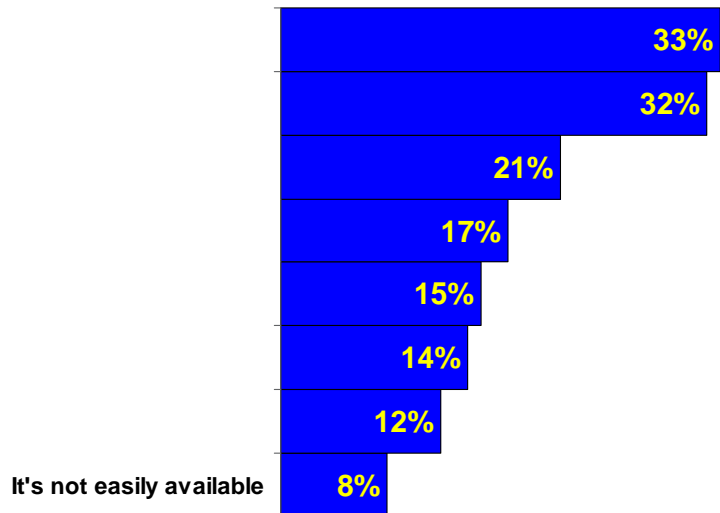
nielsen

Source: Nielsen Global Online Survey April 2008
Occasions per week
Global average 1.6

Confidential & Proprietary
Copyright © 2008 The Nielsen Company

What are the main reasons you don't eat fish?

Global Average

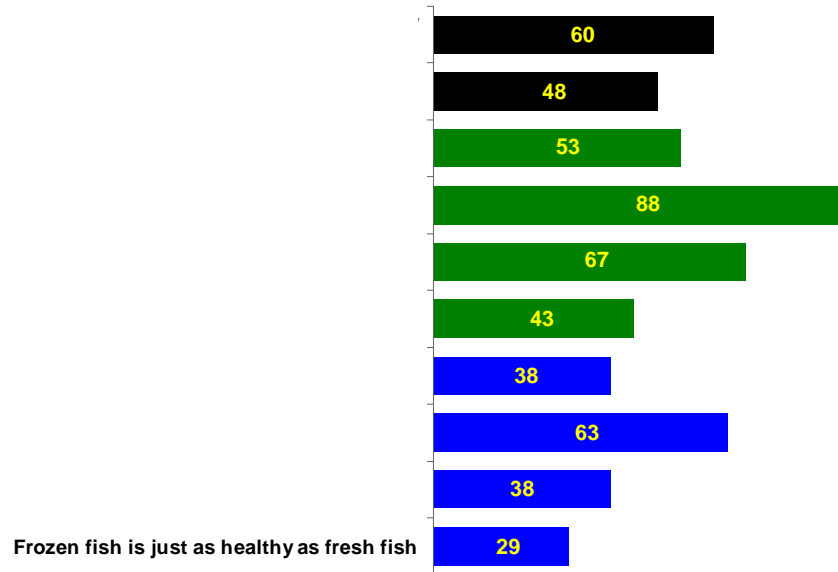


nielsen

Source: Nielsen Global Online Survey April 2008
What are the main reasons you don't eat fish?
Base: Respondents who "Rarely or Never" eat Fish

Confidential & Proprietary
Copyright © 2008 The Nielsen Company

Statements about fish: Global Averages (%)

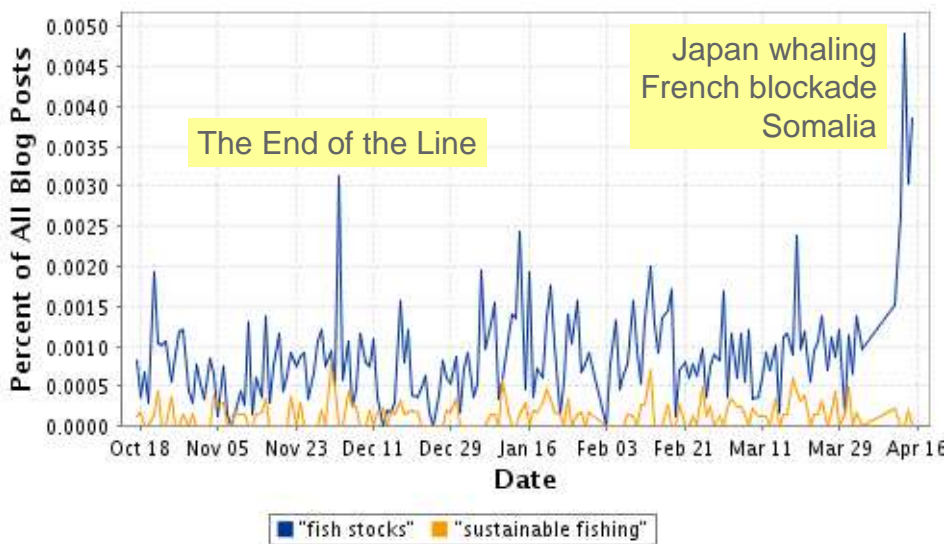


nielsen

Source: Nielsen Global Online Survey April 2008
agree + strongly agree

Confidential & Proprietary
Copyright © 2008 The Nielsen Company

Blogosphere buzz...



nielsen

Source: Nielsen BuzzMetrics

Confidential & Proprietary
Copyright © 2008 The Nielsen Company

Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites RSS Print Mail Bluetooth

http://news.bbc.co.uk/2/hi/uk_news/england/kent/7999400.stm

BBC Low graphics Help Search Explore the BBC

NEWS LIVE BBC NEWS CHANNEL

Page last updated at 11:11 GMT, Wednesday, 15 April 2009 12:11 UK

E-mail this to a friend Printable version

Blockades halt channel crossings

Ferry operator P&O has cancelled all Dover to Calais crossings due to a blockade by French fishing boats.

The blockade at the port of Calais is also causing motorway disruption in Kent, police have said.


Fishing fleets have been stopping ships entering or leaving Calais, Boulogne and Dunkirk since Tuesday, in a dispute over fishing quotas.

P&O said the protest was costing £1m a day and it was preparing a compensation case against the fishermen.

The ferry operator has not said in which jurisdiction such a compensation case might be heard.

Food rations

Services to Boulogne and Dunkirk have also been called off until



Fishermen are using their boats to stop ferries entering and leaving port

BBC Kent
Sport, travel, weather, things to do, features and much more

SEE ALSO

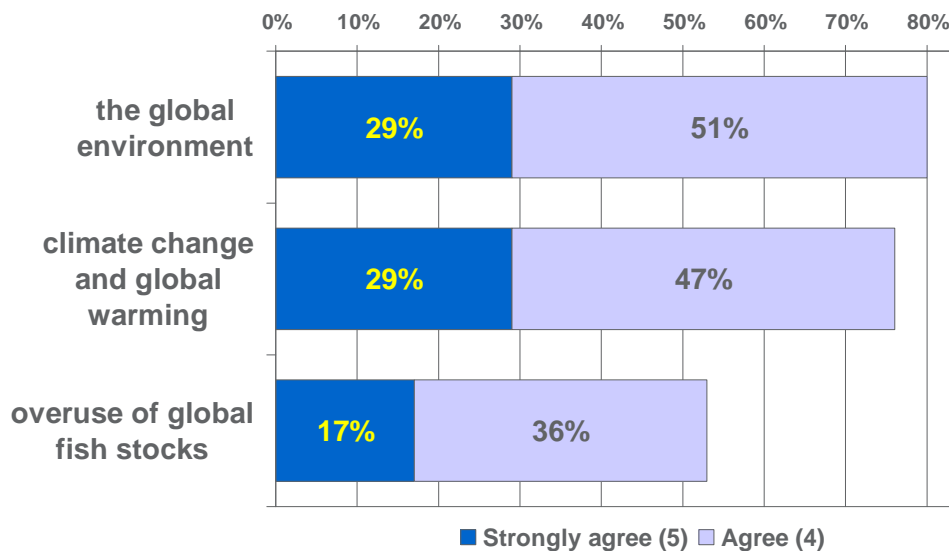
- Blocked ferry returns to port 14 Apr 09 | Kent
- French boats block Channel ports 14 Apr 09 | Europe
- EU agrees deal on fishing quotas 19 Dec 08 | Europe
- EU to overhaul fisheries policy 17 Sep 08 | Europe

RELATED BBC LINKS

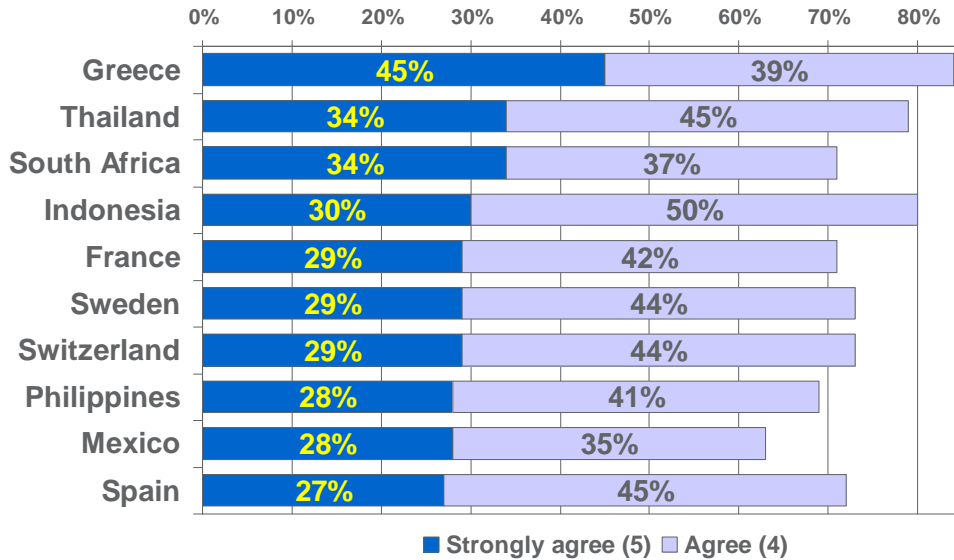
- BBC Kent: Travel
- BBC Kent: UK ferries

Internet

I am concerned about...

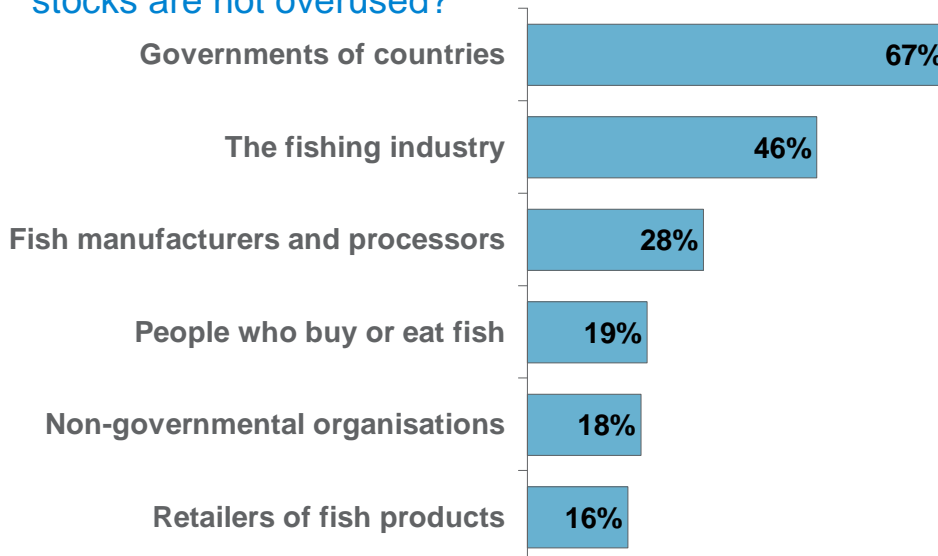



I am concerned about overuse of global fish stocks...



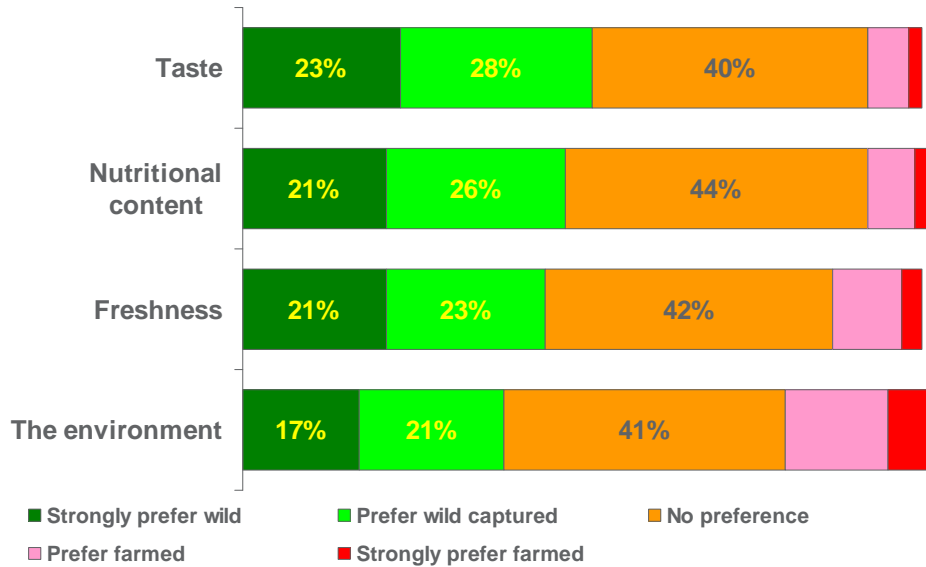

Source: Nielsen Global Online Survey
March 2009, Top 10 countries
Confidential & Proprietary
Copyright © 2008 The Nielsen Company


Who should assume responsibility for ensuring fish stocks are not overused?



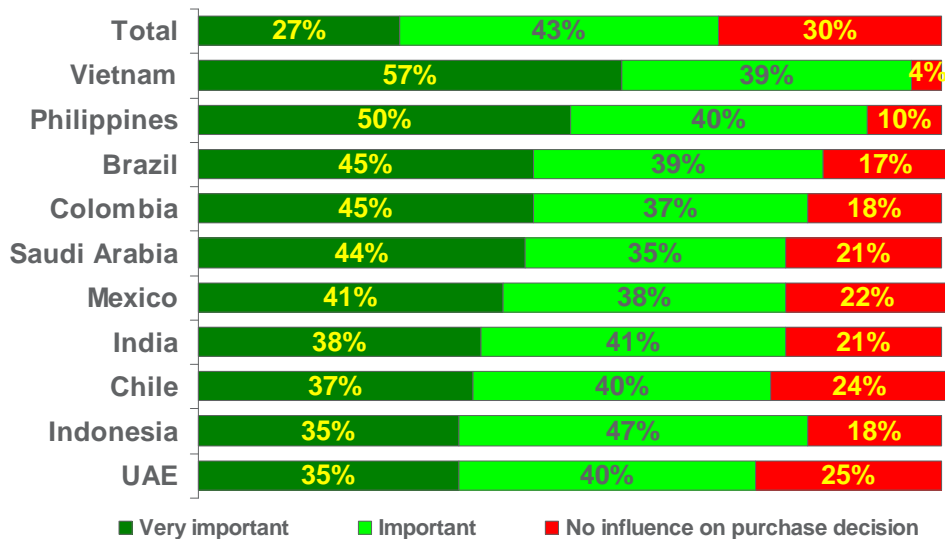

Source: Nielsen Global Online Survey
March 2009, 25420 consumers in 50 countries
Confidential & Proprietary
Copyright © 2008 The Nielsen Company

Do you prefer wild captured or farmed fish on...?



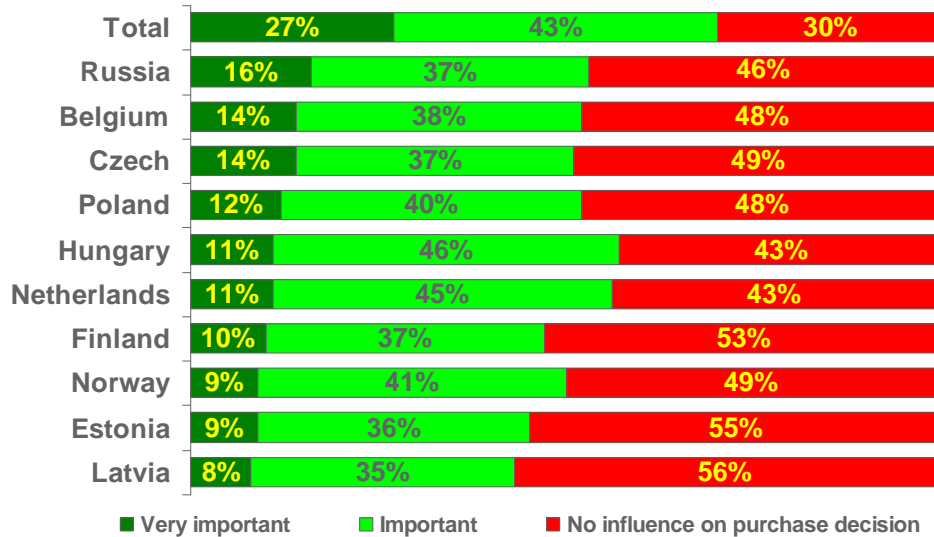

Source: Nielsen Global Online Survey
March 2009, 25420 consumers in 50 countries
Confidential & Proprietary
Copyright © 2008 The Nielsen Company

What level of influence do product labels declaring that fish is sustainably sourced have on your purchasing decision?

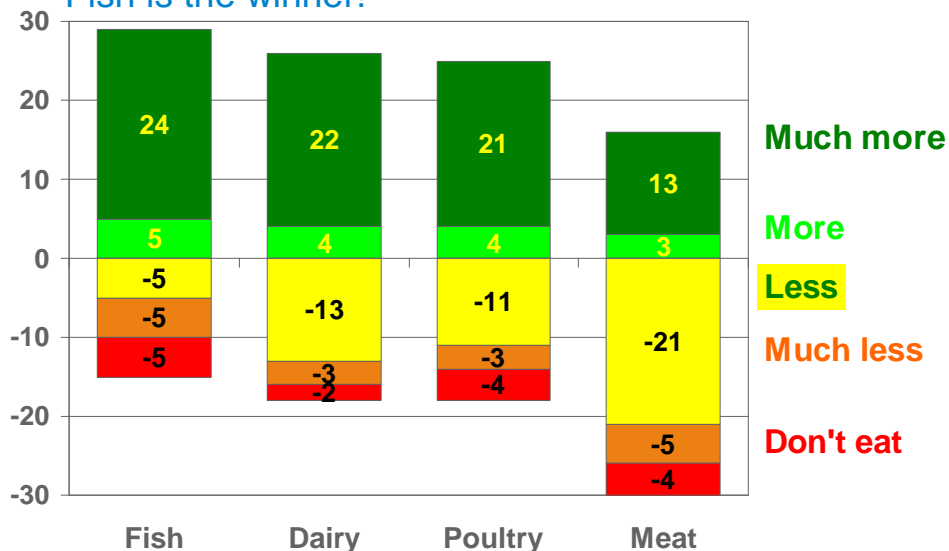



Source: Nielsen Global Online Survey
March 2009, Top 10 countries
Confidential & Proprietary
Copyright © 2008 The Nielsen Company

What level of influence do product labels declaring that fish is sustainably sourced have on your purchasing decision?



Are you eating more or less than 2 years ago?
Fish is the winner!



European retail trends

- The recession
- Retail developments
- Consumer attitudes to fish
- **What's next?**

nielsen

Confidential & Proprietary
Copyright © 2008 The Nielsen Company

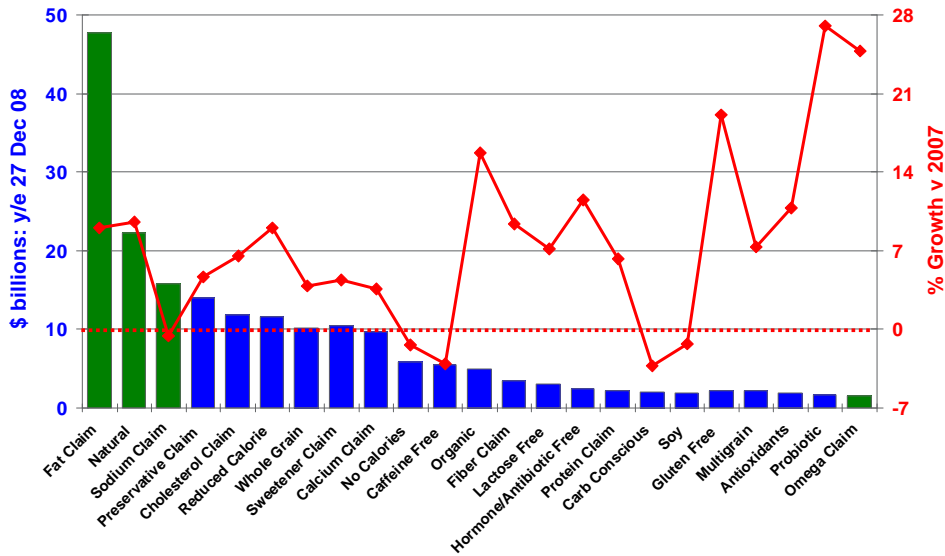
4 megatrends



nielsen

Confidential & Proprietary
Copyright © 2008 The Nielsen Company

US LabelTrends



nielsen

Sources: Nielsen LabelTrends
Total Food/Drug/Mass excl Wal-Mart

Confidential & Proprietary
Copyright © 2008 The Nielsen Company

Summary

- Recession: gloomy headlines not reflected in our data
- Retailers: modern trade winning
 - Price not a differentiator, just table stakes
- Fish consumption increasing
 - poultry growth despite Avian Influenza
 - consumption levels vary, as does frequency: average 1.6
- Many reasons to avoid...
 - taste, smell, bones, cost
- Fresh > frozen; Wild > farmed
- Consumers not taking responsibility for sustainability
 - though labelling claimed to influence purchase decision

Full country level details available: jonathan.banks@nielsen.com

nielsen

Confidential & Proprietary
Copyright © 2008 The Nielsen Company