

THE END OF THE LINE

A SOCIAL IMPACT
EVALUATION BY



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EXECUTIVE SUMMARY

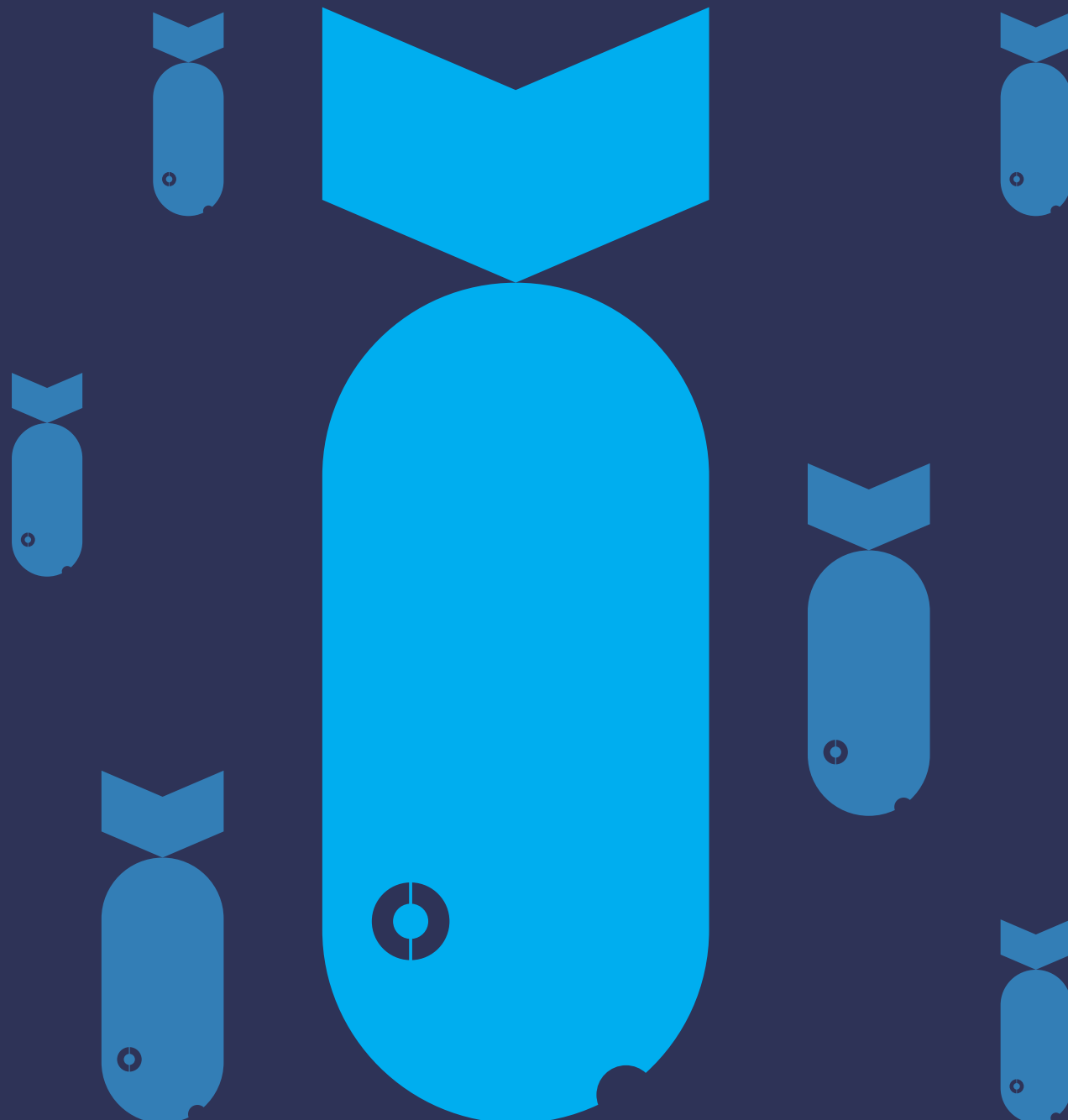
How much impact did the film *The End of the Line* really have in the UK – on citizens, their politicians, customers and businesses?

The film *The End of The Line* set out to raise the alarm about over-fishing and used considerable resources to do so.

Funding of around £1 million was secured for the production of the film, its campaign and distribution though this did not cover all costs.

There was additional support from Greenpeace and other campaign partners as well as marketing input from Waitrose. The filmmakers and outreach teams gave much of their time for free in the four years the film was in production.

So, was it worth it? This Social Impact Evaluation report, the first of its kind for a film, shows that it was. Much was achieved by the film directly and as much or more indirectly, all of it detailed in the following chapters.



Public awareness of over-fishing was raised. Only 2% of the adult public in the UK watched *The End of the Line* but 9%, or 4.7million people heard about it.

The film created a huge amount of press interest in the issue of over-fishing, with a PR value of over £4 million.

A year after the film was released, more people in the UK were concerned about the issue of over fishing and more people were eating sustainable fish. Though how much of this can be attributed to the film which launched alongside multiple campaign efforts, is harder to isolate.

Whilst films can be catalytic to movements, they can't supplant them and the work of other organisations whether official partners to the film or not, were crucial in setting the stage for the film's impact.

However the *The End of the Line* did appear to create a tipping point in corporate policy.

Many household names from Prêt a Manger restaurants to Whiskas cat food switched to sustainable sources of fish, attributing the film directly for this change in policy.

The film was highly successful as a strategic lobbying tool. The power of Rupert Murray's film was capitalised on by producers Christopher Hird, George Duffield, Claire Lewis and Chris Gorrell Barnes, along with Charles Clover, the author of the original book.

They targeted celebrities, business owners, politicians, journalists and other decision makers and opinion formers, inviting them to screenings and following up with meetings and requests. Indeed the number of committed and well connected producers was perhaps the film's greatest asset.

There were failures too. The goal of a ban on bluefin tuna fishing evaded the filmmakers and campaign partners despite extensive lobbying. We are no closer to a regulatory solution for over-fishing now than when the film was first released.

However, the team are close to securing a public-private partnership to safeguard a new marine reserve in the Indian Ocean, that would make a significant contribution to the protection of biodiversity.

***The End of the Line* undoubtedly owes much of its success to the unusually strategic and focussed approach of the team who built the aims of the film into the filmmaking process from the start – and it paid off.**

BACK-
GROUND



Background

Why Study The Impact of a Documentary?

In the last 10 years documentaries and TV are increasingly being recognised as a key medium for communicating social justice issues and inspiring social change. More films like this are being made and there have been some high profile examples including *Supersize Me*, *An Inconvenient Truth*, *Sicko*, *Jamie's School Dinners*, *The Cove* and *The Age of Stupid*.

As a consequence filmmakers are finding new fiscal and non-fiscal partners, in constituencies that would not traditionally be considered – or consider themselves – media funders or partners.

This practice of foundations and NGOs investing in documentary media is much more established in the US than in Europe. But even in the US there is widespread lack of understanding about how the social impact of such media should be monitored and reported and a dearth of templates and tools to assist them.

Capturing the impact of a film is no easy matter. It is hard to distinguish the effect of the film from other factors. It is difficult to find ways to measure intangible effects and appropriate data can be expensive to gather. Many films rely on anecdotal evidence or common sense to establish their impact, and the lack of hard evidence presented can lead to cynicism that films achieve anything other than entertainment.

This detailed report into the impact of *The End of the Line* is intended to contribute to the growing, and important field of work on media impact assessment. We hope it can be a template for other film projects giving best practice examples of gathering and presenting quantitative and qualitative data.



Background

**The Channel 4
BRITDOC Foundation**
www.britdoc.org

The Channel 4 BRITDOC Foundation is a not for profit organisation which empowers documentary filmmaking, with a strong focus on social-justice films.

Thanks to generous support from Channel 4, PUMA.Creative and other sponsors, we fund great films with global ambition, broker new partners and help to build new business models for filmmakers to deploy.

At the Channel 4 BRITDOC Foundation, we have been grappling with this increasingly urgent need for concrete ways of tracking and evaluating the impact of documentary film. Both as funders on individual film projects (such as *The End of the Line*) but also as devisers of the Good Pitch, our live matchmaking event which brings together the makers of social-justice documentary films with foundations, NGOs, brands & government agencies who can use these films in their work.

Our recent partnership with PUMA.Creative sees the launch of a new annual Impact Award, which will identify and honour the film which has caused the most significant social impact, with a €50,000 prize.

Our goal as an organisation is to evolve best practice for filmmakers and partner organisations looking to work with film. To create tools that all parties can use to monitor and evaluate the impact of their work.



Background

The End of the Line is a feature documentary charting the potentially catastrophic effects of over-fishing on the world's oceans. The film is based on the book of the same name by journalist Charles Clover, who features in the film alongside the world's leading fishery scientists.

The End of the Line's £1m budget was met by a number of non-profit organisations including The Channel 4 BRITDOC Foundation (full disclosure: the Foundation is running this evaluation and also contributed to the executive production of the film).

There were a number of other partners who did not have editorial input to the film: The Waitt Family Foundation, MarViva, The Oak Foundation, WWF, The Weston Foundation, The Clore Foundation, The Marine Conservation Society, AD Charitable Trust, GD Charitable Trust, Waterloo Foundation, Oceana and Fledgling Fund.

Why we chose *The End of the Line*

The End of the Line broke ground. At the time, very few UK documentary films had received production, marketing and audience engagement funding from such a range of non-broadcast sources. *The End of the Line* was also unusual in that the filmmakers set out with the intention of using the film as a tool for change and worked closely with their partners to achieve this aim.

Our position as joint-funders of *The End of the Line* gave us a unique opportunity to work with the production team and the film's partners as they came on board. To track the impact of the film in a number of different areas and to gather data over a significant period, covering the UK release in cinemas, on DVD and television.



Awareness



Partnerships



Consumer Attitudes
and Behaviours



Corporate Impact



Political Impact

Background

So far, *The End of the Line* has been released cinematically and shown on television in many countries. However, this study is focused on the social impact of the film in the UK only.

We believed this would be the only way to give an in-depth picture of the impact of the film within a defined set of parameters in the following arenas:

Scope of the study

1. Public Awareness
2. Consumer Attitudes and Behaviour
3. Corporate Policy
4. Political Action
5. Impact on the Film's Partners

Fledgling Fund's Creative Media Social Impact Continuum

Quality Film/
Media Project

Increased Public
Awareness

Increased Public
Engagement

Stronger Social
Movement

Social
Change

Background

Studying the social impact of documentary media is still a nascent process and as such there is not an industry-recognised model for carrying out this type of evaluation.

At the beginning of our study, we looked at various examples of analysis. These included the Logical Framework Approach, used by development organisations for project planning and evaluation, as well as the 2008 working paper by the US-based film foundation the Fledgling Fund, entitled *Assessing Creative Media's Social Impact*.

Fledgling's approach uses the schema on the left to stratify the steps from film to change. At the centre is a strong editorial film such as *The End of the Line*. The second step is public awareness which can help to set up public engagement and a social movement capable of influencing behaviour and policy.

Methodology

Public awareness is raised by a core group – people who have seen the film and who talk about it to others. People who have not seen the film become aware of the issue through the press, from word of mouth or an associated campaign. Our first section of research, Levels of Awareness, leans heavily on this definition.

From here we considered how awareness led to changes in attitude and behaviour in consumers. Then how the film affected business, and finally the impact on politics.

At the start of this evaluation process, we were unsure where the film had most significant impact, whether with consumers or in the corporate or political sectors.

With this in mind, we took the decision to commission multiple surveys (both qualitative and quantitative) and gather data from a number of sources in order to get a broad overview of the film's footprint.



Background

Original Research

These include:

1. YouGov survey commissioned independently by Waitrose supermarkets before the film's release, tested public awareness of the issue of over-fishing.
2. Entry / Exit survey conducted by Channel 4 BRITDOC Foundation on audiences attending the premiere of the film in June 2009 captured the film's effect on audience knowledge and attitude.
3. Quantitative YouGov survey conducted July 2009 tested public awareness of the film and the issues contained and was repeated in March 2010.
4. Media Gen press value assessment – made first in September 2009 and updated in September 2010, capturing press value of the cinematic and television release up until that point.

5. Freud Communications Qualitative Focus Groups tested the effect of the film on a panel of consumers, fish sellers and fish buyers, conducted during September and October 2009 and repeated in September 2010.

6. Channel 4 commissioned survey from IPSOS Mori – tested audience awareness of the film and attitudes to the issue in October 2009, just before the More4, Channel 4's digital channel transmission and again in January 2011 for a final comparison point.

In addition we have drawn upon other research produced during this period from non-commissioned sources including MSC, WHICH?, Channel 4 Television, Nielsen & Google Analytics.

Goals of Filmmaking Team

From the outset, the makers of *The End of the Line* were incredibly ambitious about what they wanted and hoped the film would achieve. They were aiming for wide-ranging impact, including:

1. Creating an effective, mass-media campaign around the film
2. Mobilising public opinion
3. Changing consumer behaviour (increasing demand for and sales of sustainable fish)
4. Mobilising political opinion
5. Creating policy change (including protection for bluefin tuna and the creation and funding of new marine reserves)
6. Positive changes in corporate policy

Background



director

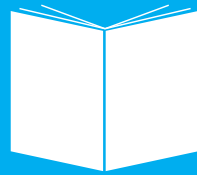
The Filmmaking Team

The key team members on production included:

Rupert Murray – Director
Charles Clover – Author of *The End of The Line*
Claire Lewis – Producer
George Duffield – Producer
Christopher Hird – Executive Producer
Jess Search – Executive Producer
Chris Gorell Barnes – Executive Producer
Clare Ferguson – Editor

Additional team who worked on the film outreach campaign included:

Hannah Gallagher – Outreach Co-ordinator
Willie Mackenzie – Greenpeace UK
Anthony Pickles – Website support
Pixeco – Poster and Website design



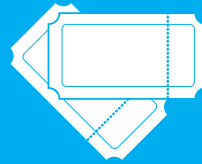
2004
Charles Clover's
book, *The End of
the Line*, published



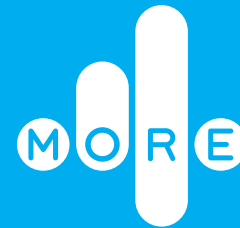
May 2007
Film production
begins with funding
from Channel 4
BRITDOC Foundation.



January 2009
The film premiered
at Sundance Film
Festival in the USA



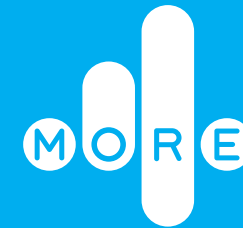
June 8th 2009
Opened to a limited
UK theatrical run
accompanied by
prolonged press
interest



October 20th 2009
Screened on More4,
the digital station
belonging to
Channel 4 in the UK



March 6th 2010
Screened on
Channel 4, the
terrestrial UK
broadcaster



July 27th 2010
Repeated on
More4



September 9th 2010
repeated on
Channel 4

LEVELS OF AWARENESS



Levels of Awareness

Our research in this section was aimed at identifying how far watching *The End of the Line* raised levels of awareness of the issue of over-fishing.

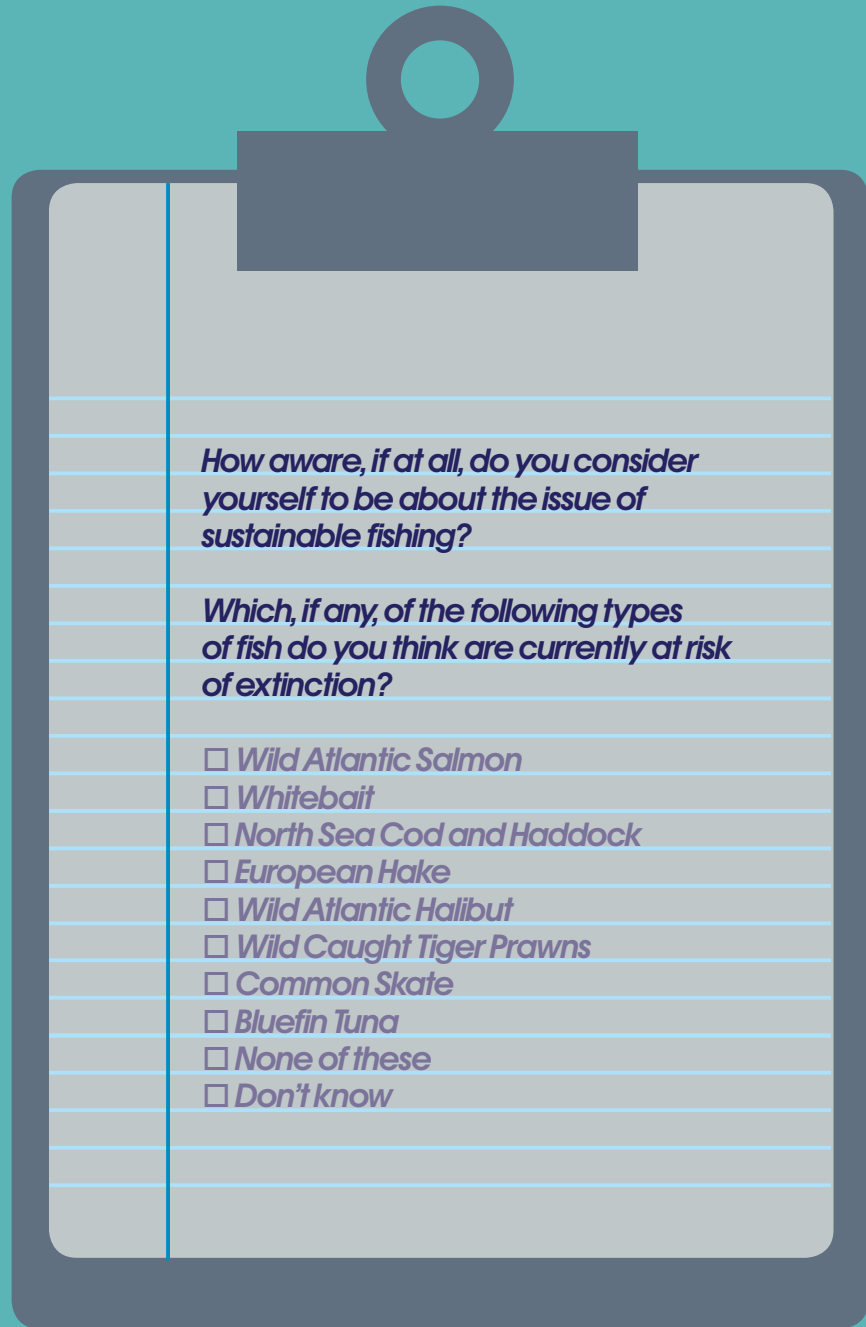
Introduction

We wanted to establish levels of awareness in the UK before the film was released, how many people then saw the film or read about it, and what affect the film had on those audiences.

Over the next 18 months we would track:

- The number of people who saw the film in its entirety at invited screenings, at the cinema, on DVD and on television.
- The number of people who saw the TV trailer or extracts from the film online, in educational materials or other sources.
- People who heard about the film from the considerable media coverage that accompanied its release.

The last group was of particular importance to us because of its potential size. It offered the opportunity to influence a much wider group than the film's audience



How aware, if at all, do you consider yourself to be about the issue of sustainable fishing?

Which, if any, of the following types of fish do you think are currently at risk of extinction?

- Wild Atlantic Salmon*
- Whitebait*
- North Sea Cod and Haddock*
- European Hake*
- Wild Atlantic Halibut*
- Wild Caught Tiger Prawns*
- Common Skate*
- Bluefin Tuna*
- None of these*
- Don't know*

Levels of Awareness

A few weeks prior to the cinematic release of the film, Waitrose commissioned a YouGov survey with over 2000 consumers to look at levels of awareness around sustainable fish.

The survey in May 2009 revealed that of those polled:

- 8% defined themselves as very aware about the issue of sustainable fishing
- 70% somewhat or not very aware
- 22% not at all aware or didn't know

A Snap Shot of Public Opinion Before the Release of the Film

'New research has revealed that 72% of people are unaware that some fish are as close to extinction as the white rhino.

When made aware of the facts, 70% of people are more likely to make sustainable choices. But 78% admit that they currently don't attempt to buy sustainable seafood at all.'

Waitrose Press Release, June 2nd 2009



Levels of Awareness

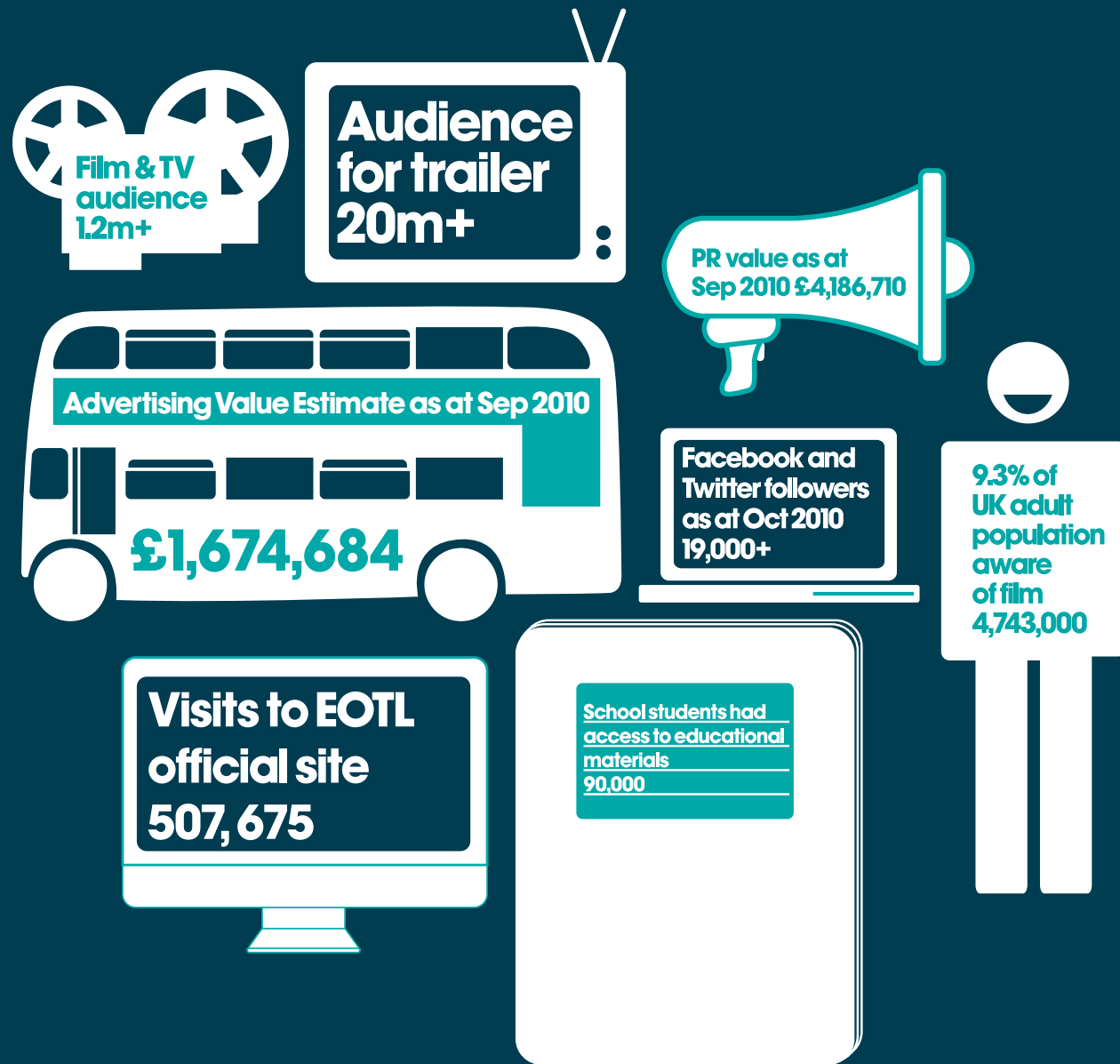
The first indications were positive. An entry and exit survey was conducted on the very first night of the UK cinematic release, involving 302 respondents from two different cinemas.

The Film Was Released June 8th 2009

Unsurprisingly, a large proportion of this audience had chosen to come and see the film because they were already interested and concerned about the issue.

226 respondents indicated they already believed over-fishing to be a big problem. The remaining 76 people indicated, before watching the film, that they did not believe over-fishing to be a big problem.

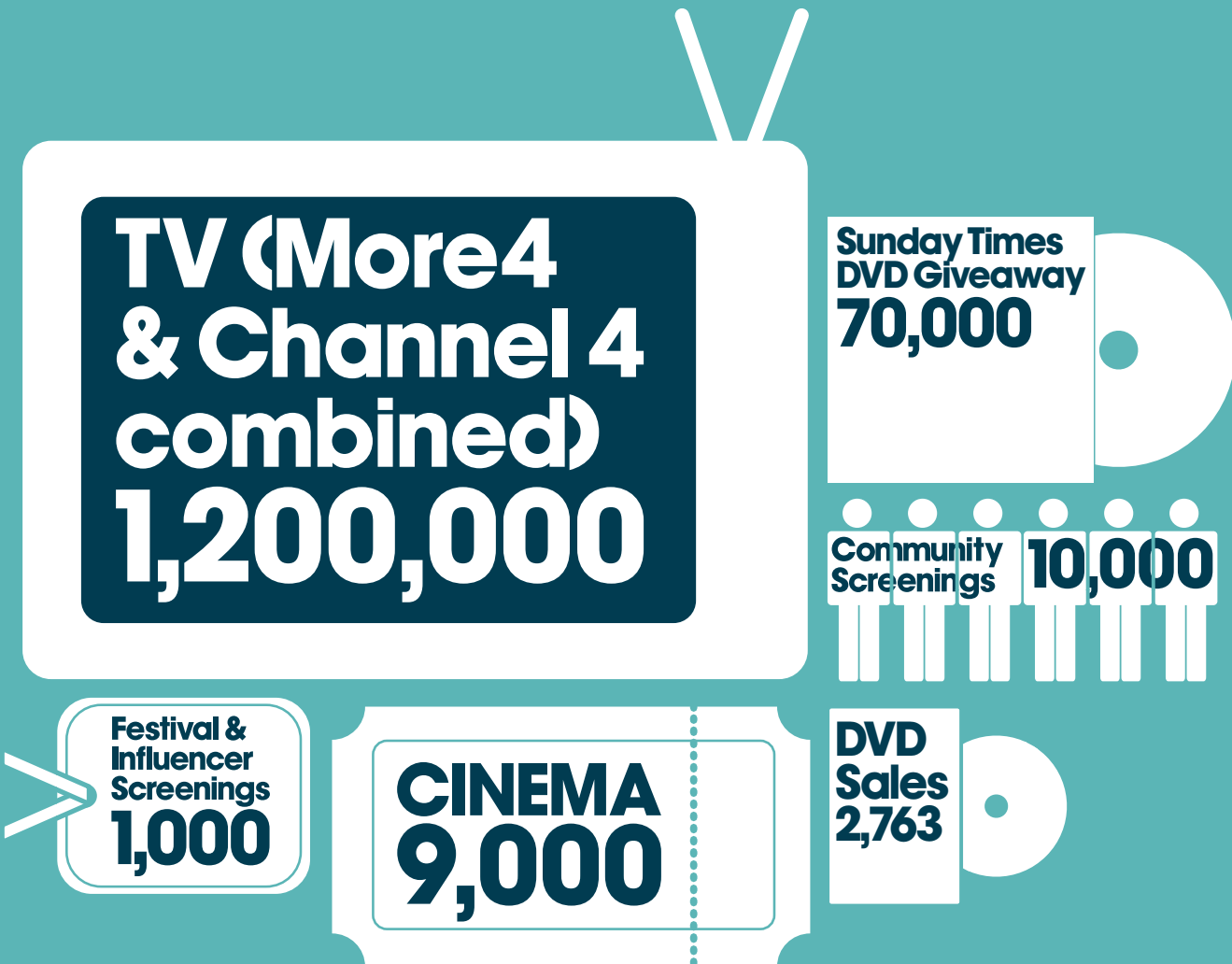
After watching *The End of the Line*, 80% of that group were now convinced it was a significant issue indicating that the film could change minds. Would this now be replicated across the general release and a mass TV audience?



Levels of Awareness

Levels of Awareness: At a Glance

| Platform | Audience No. |
|---|------------------|
| Film & TV audience | 1.2m+ |
| Audience for TV trailer | 20m+ |
| Advertising Value Estimate as at Sep 2010 | £1,674,684 |
| PR value as at Sep 2010 | £4,186,710 |
| Visits to EOTL official site | 507,675 |
| Facebook and Twitter followers as at Oct 2010 | 19,000+ |
| Schools students with access to educational materials | 90,000 |
| UK adult population aware of film | 4,743,000 (9.3%) |



Levels of Awareness

Levels of Awareness:
In Detail

Audience numbers for the film in the UK

| Platform | Audience No. |
|------------------------------------|------------------|
| Cinema | 9,000 |
| Community Screenings | 10,000 |
| TV (More 4 and Channel 4 combined) | 1,200,000 |
| DVD sales | 2,763 |
| Sunday Times DVD give away | 70,000 |
| Festival and influencer screenings | 1,000 |
| Total Estimated Audience | 1,295,117 |

“The End of the Line... the inconvenient truth about the impact of over-fishing on the world’s oceans”
The Economist



Levels of Awareness

Cinema release

On June 8th *The End of the Line* was screened simultaneously across 36 cities around the UK. 4555 people saw the film.

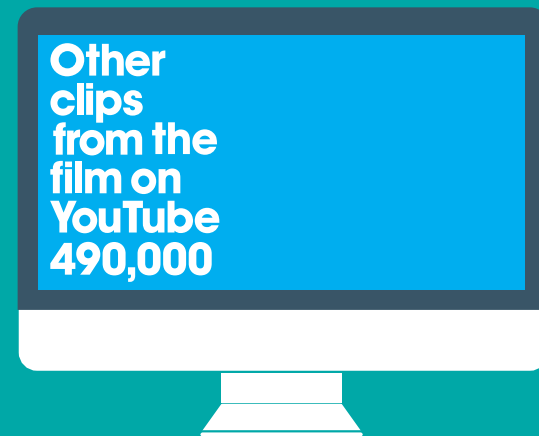
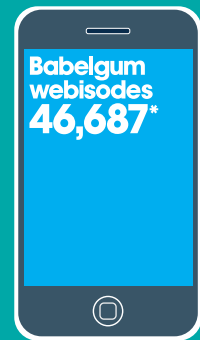
By October 2010 the film had been rolled out to over 70 towns and cities across the UK. The total UK cinema audience is estimated at 9,000, roughly equivalent to *Burma VJ* or *Black Gold* and is standard for a documentary of this kind.

Levels of Awareness: In Detail

Educational screenings

At the release of the film in June 2009, Film Education organised 16 screenings across the UK attended by 2,003 students. The film played again during National Schools Film Week in October 2009 and 2010 screening to students in Birmingham, Bradford, Bristol, Liverpool, Manchester and Nottingham.

In addition 1,500 schools downloaded the curriculum-based materials created on the issues raised in the film. This meant 90,000 students would have seen the teaching materials, available here:
www.filmeducation.org/theendoftheline/



*These views have come from 190 different countries and so do not represent a purely UK impact

Levels of Awareness

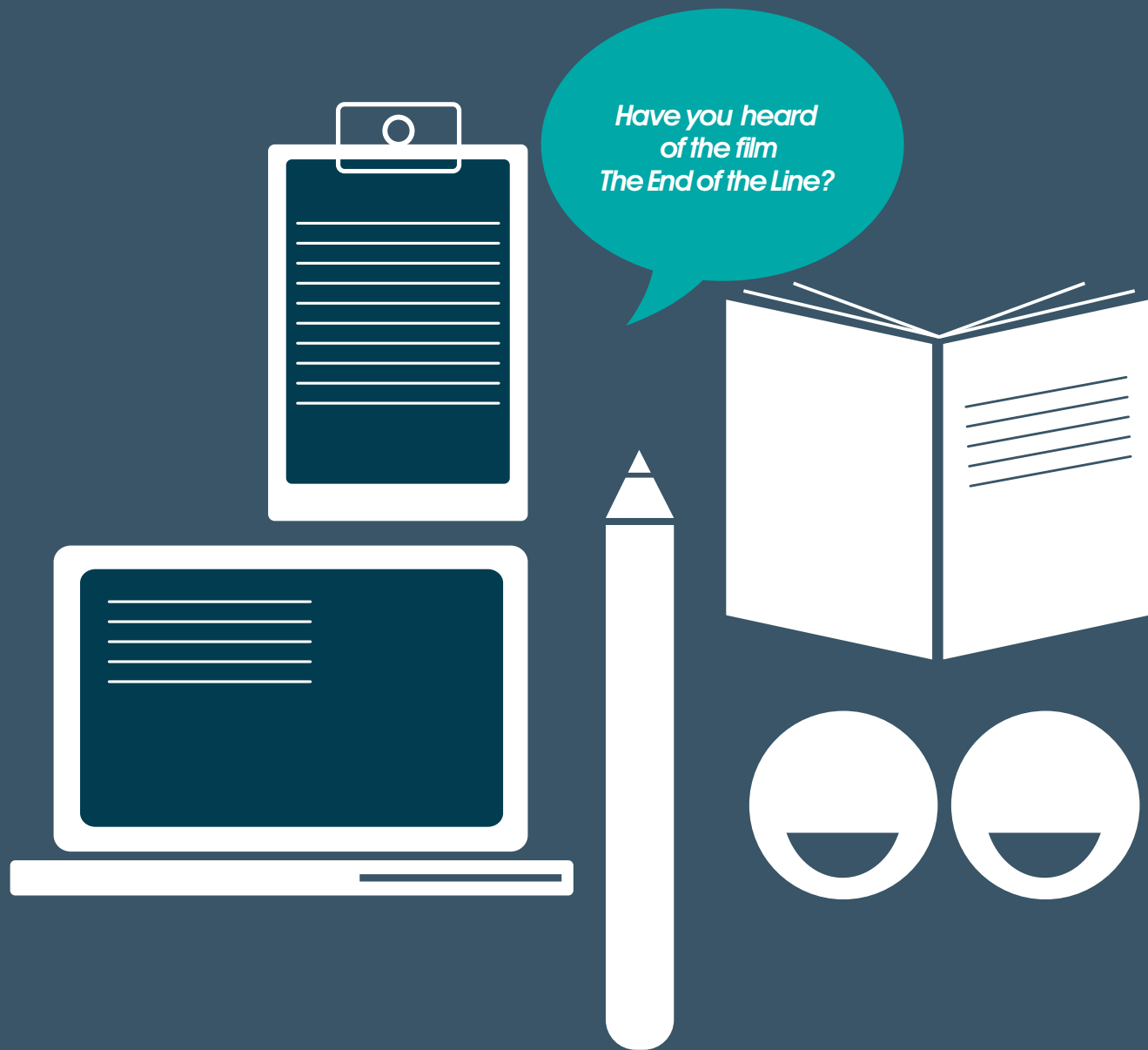
The number of views of the trailer for *The End of the Line* is estimated at over 20 million

Levels of Awareness: In Detail

Trailer views

In addition to multiple plays on Channel 4 and More4 Television, the trailer was available on YouTube alongside a number of other clips relating to the film, including an endorsement from Ted Danson speaking about the issue. There were also webisodes available during this period which featured on Babelgum's online channel.

While the trailer and webisodes do not present all of the detailed argument and evidence, they do convey the over arching message of the film and therefore it can be assumed that the trailer did contribute to awareness around the issue of over-fishing.



Levels of Awareness

For every person who had watched *The End of the Line*, another 510 people had heard about it.

In order to try to get an idea of the film's footprint in the wider UK population, i.e. those who may not have watched the film but heard about it or were made aware of the film's key messages through indirect coverage, we commissioned a number of independent pieces of research.

Levels of Awareness: Commissioned Research

July 2009

We commissioned a YouGov survey just after the film's cinematic release but prior to the More4 broadcast.

The key finding was that 8% of the British public were aware of *The End of The Line*. This was before the TV transmission, at a time when only 8,000 people had actually seen the film at the cinema.

8% of the UK population (where the adult population = approx 51 million) represents around 4,080,000 people. This suggests for every person that had watched *The End of the Line*, another 510 people had heard about it.



Levels of Awareness

October 2009

Channel 4's commissioned Ipsos MORI poll in October 2009 put the % of the population who had heard of the film at 11%.

March 2010

We commissioned YouGov to repeat their initial survey, in order to track how awareness of the film amongst the UK population had changed over time.

This quantitative sample showed that 9% of the UK population was now aware of *The End of the Line*.

Levels of Awareness: Commissioned Research

The average of all three surveys is 9% – taken as the final figure by this report. So we concluded that nearly 4.7m adults in the UK were aware of *The End of the Line* by the spring of 2010

How aware, if at all, do you consider yourself to be about the issue of sustainable fishing?

% of sample polled said:

| | YouGov 07 May 2009 | IPSOS MORI 19 Oct 2009 | YouGov 31 Mar 2010 | IPSOS MORI 16 Jan 2011 |
|------------------------|--------------------------|------------------------------|--------------------------|------------------------------|
| Very/ somewhat aware | 53 | 44 | 52 | 57 |
| Not very/ at all aware | 43 | 52 | 45 | 39 |
| Don't know | 4 | 3 | 3 | 4 |

Levels of Awareness

We also tried to capture changing levels of awareness about the issue of sustainable fishing over time in the UK population. We asked the same question 4 times between May 2009 and January 2011 but the results were contradictory.

The initial YouGov survey indicated that only 53% percent of people were reasonably aware of over-fishing. This number went down in the next two surveys. Yet it is highly unlikely that less people had heard of over-fishing six months later.

Neither the population had changed significantly nor is it likely that people had forgotten about the issue in such a short time frame. The conclusion has to be that the results of such national surveys must be taken with a pinch of salt.

Levels of Awareness: Commissioned Research

The worst reading of the data set – is that awareness of the issue only increased by 4% from before the film opened until January 2011. The best reading of the data is between the two IPSOS Mori surveys in October 2009 and January 2011 which showed an awareness increase of 13%.

Meanwhile, other support for a significant rise in public awareness came from the Marine Stewardship Council. Their survey showed the number of people in the UK who strongly agreed *'The total number of fish in the sea is at a critically low level now and will run out unless we do something'* rose from 43% to 56% between 2008 and 2010. This is also a rise of 13% of public awareness.

MSC attribute this change to a combination of growing numbers of labelled products alongside increased media coverage during the period.

FOCUS POINT: THE LONDON PAPER



Just 3 days after *The End of the Line's* cinema release, the London Paper launched 'Know the Price of Fish', a campaign to name and shame London restaurants serving endangered fish.

The newspaper picked up on the story that chefs were being slow to respond to Charles Clover's requests to stop serving particular species of endangered fish.

After signing up Aldo Zilli as the face of the campaign, the London Paper ran a series of articles about its progress, which recapped the issues in *The End of the Line*, frequently name-checking the film. name-checking the film.

Levels of Awareness

Publicity around the film's release was handled by Rogers & Cowan and augmented by the producers as well as Charles Clover's standing as a well-respected environmental journalist and his extensive network of contacts.

When compared to other documentaries of the same budget and scale, *The End of the Line's* coverage was significant, with broad coverage achieved both about the film itself as well as widespread reporting about the issues within the film across both broadsheets and tabloids.

National Press Coverage

The success in securing broad coverage must also be viewed against a general decrease in reporting on environmental issues during the period, attributed to the global financial crisis.

Individual efforts of the production team had a significant impact when, for example, the producers secured £300,000 worth of free advertising space in national newspapers in the week prior to release.



MediaGen conducted a media analysis of the press generated by the film in September 2009 and updated in September 2010. This analysis looked at the Advertising Value Equivalency (AVE) and the PR value as well as the messaging of the pieces.

This is the common method for marketing and public relations professions to assess the value of an advertising or PR campaign. They act as proxy to value the number of people likely to have seen an advert or read an article.



Levels of Awareness

Definition of AVE value

In such an analysis, all coverage is given an estimated 'value' against press coverage, had it been placed as paid for advertising. Each article is analysed individually and the relevance of the target content to the whole is considered. The column cm area is then measured and a calculation is made using the most up-to-date, published advertising rates. Each individual item is evaluated by a fully trained AVE analyst.

With regard to *The End of the Line*, AVE indicates how much it would have cost to have achieved the same level of awareness by buying adverts instead of having made the film.

MediaGen Analysis: AVE Value

AVE Value of the film

Calculated at £1,244,469 at September 2009

Increasing to £1,674,684 at September 2010

This figure compared favourably to mainstream TV documentaries such as *Ross Kemp: Return to Afghanistan* on Sky1 or *Jamie Saves Our Bacon* on Channel 4.



Levels of Awareness

Definition of PR Value

It is widely held that PR is more valuable than display advertising, for many reasons including, it being seen as an independent endorsement of a product/service. Although there is no formal agreement in the media evaluation community about how much more PR is worth than advertising, an industry standard is to simply multiply the AVE by 2.5.

Levels of Awareness

PR Value of the film:

Calculated at £3,111,173 at September 2009

Rising to £4,186,710 by September 2010

It is notable that Waitrose (who partnered on the release of the film in cinemas) was mentioned in a fifth of all the items analysed.

“The profile in the media was good for the brand. It was also good for the partners at Waitrose to see us taking such a high profile stance on the issue. It helped to ensure everyone here was on the same page, helping us to continue to build on our credentials.” Quentin Clark, Head of Sustainability, Waitrose



507,675

Levels of Awareness

Online & Social Media:
At a Glance

| | |
|--|-----------|
| Total visits to official website (as at October 2010): | 507,675 |
| Unique visitors to the official website (as at Oct 2010) | 390,610 |
| Average page views | 2.14 |
| Average time on site | 2:06 mins |
| Facebook followers (as at Oct 2010) | 15,173 |
| Twitter followers (as at Oct 2010) | 3,882 |



@stephenfry

Staggered by brilliance of The End of the Line. PLEASE go & see it when it opens 50 screens nxt wk. Rarely felt so strongly about anything.

10:08PM Jun 1st, 2009 via web

@stephenfry

Astounding&horrifying but there's hope there too. Great film. Just what cinema needs. A real issue: but we can win.

10:10 PM Jun 1st, 2009 via web

@stephenfry

And no, I promise I've nothing to do with the film. Just a wide-eyed admirer. The oceans are the biggest issue facing us, but it's solvable.

10:11 PM Jun 1st, 2009 via web

Levels of Awareness

The film's official website endoftheline.com launched in June 2009. The site was and continues to be regularly updated with coverage both of the film and the issues.

Online & Social Media: At a Glance

The film also has a very active Facebook page and Twitter account launched immediately before the cinema release. This is still regularly updated by Greenpeace, featuring regular updates about endangered species and key policy developments around the issue.

The film was also followed on Twitter by important influencers such as Stephen Fry and Sarah Brown – who re-tweeted information about the film on a number of occasions to their 1 million+ followers.

FOCUS POINT: CELEBRITY ENDORSEMENT



The End of the Line and the issues within it secured significant support from celebrity advocates including Prince Charles, Greta Scacchi, Emilia Fox, Terry Gilliam, Richard E Grant, Stephen Fry and Sarah Brown among others.

Charles Clover commented that those who chose to endorse the film had done so by making a sincere and “principled decision” and added real value to the campaign. The endorsements were instrumental in garnering press interest, enabling political access as well as expanding the coverage of the film from the broadsheets to the mid-market and tabloid newspapers, ensuring that a much wider and more diverse readership was reached.

FOCUS POINT: CHANNEL 4 FOLLOW UP PROGRAMMING



Channel 4 which screened *The End of the Line* then worked with their roster of celebrity chefs including Jamie Oliver to create a major season of programming called *The Big Fish Fight*, highlighting different aspects of the over-fishing crisis.

The season, which built on the interest created by *The End of the Line*, was shown in January 2011. It included 15 programmes featuring Hugh Fearnley-Whittingstall, Heston Blumenthal and Gordon Ramsay and reached 18 million viewers in the UK.

The End of the Line is a film which punched way above its weight in terms of press attention and awareness, above and beyond the size of the film audience.

For every person who had watched *The End of the Line*, another 510 people had heard about it.

It has achieved more than 4 times its original budget in press and PR value for the issue it sought to highlight, reaching 4.7 million people in the UK.

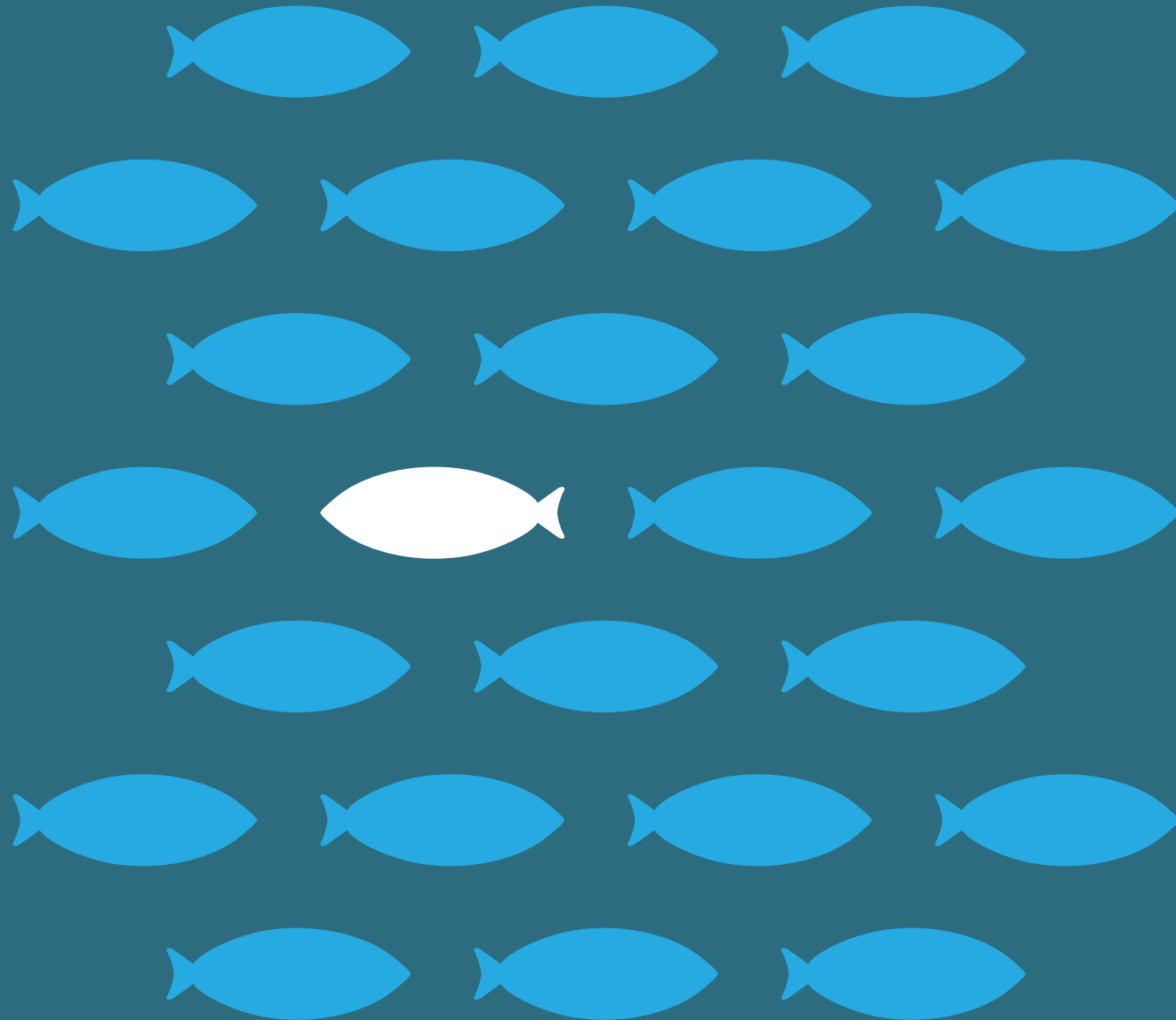
The strategic simultaneous cinema release was highly effective in maximising media coverage across broadsheets and tabloids.

Celebrity endorsements were also key to considerable press attention and buzz around the film.

One area of improvement could have been the timing of the film's social media engagement. Ideally it would have been activated a year or two earlier during the production of the film, rather than just before the cinematic release.

Nonetheless, the social media activity has and continues to be an important tool in galvanizing and connecting with fans of the film and of the issue.

CONSUMER ATTITUDES & BEHAVIOUR



Would rising levels of awareness of over-fishing result in changes in consumer behaviour?

Our research in this section on Consumer Attitudes and Behaviour was trying to determine if the film could mobilise people to act.

Would we see consumers start to avoid unsustainable fish in supermarkets and restaurants? Could we track correlating trends in fish sales?

Over the next 18 months, as the press died down, would behaviour stick and what unforeseen barriers would consumers encounter?

Affecting Consumer Attitudes

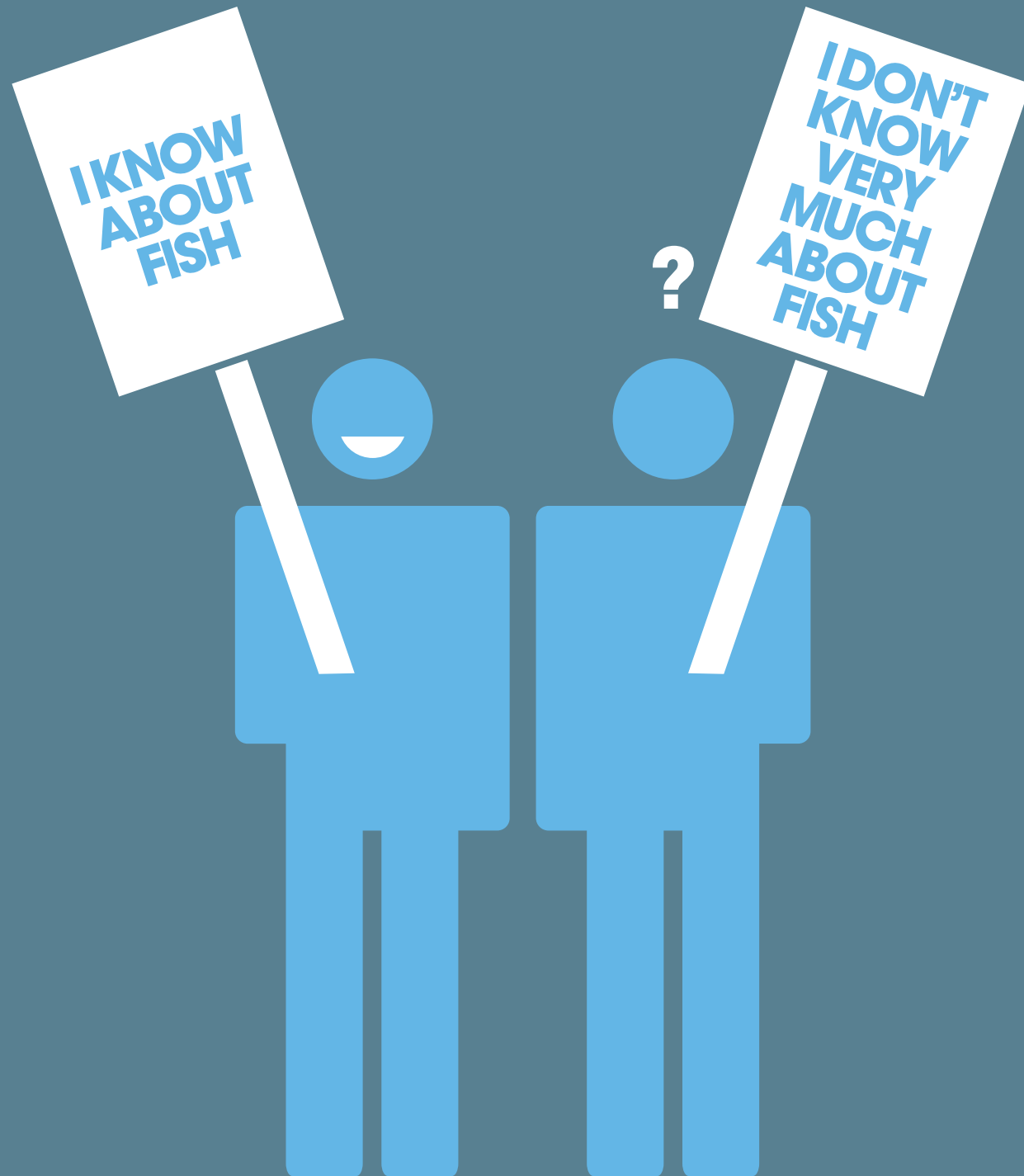


“The film made me much more aware and concerned... it gave me a lot of information”

The Entry and Exit survey carried out after the film's premiere in two London cinemas asked the audience about their buying habits before the film and their intended buying habits after the film.

A large proportion of this audience had chosen to see the film because they were already interested and concerned about the issue but 26% people indicated before watching the film, that they did not believe over-fishing to be a big problem.

What happened to this group after watching the film? 85% of this audience upgraded their concern to 'quite a big problem' or 'one of the greatest problems' facing us.



Consumer Attitudes
& Behaviour

Across the whole audience, the commitment to buying sustainable fish was almost doubled from 43% to 84% after one screening of the film.

Affecting Consumer Intentions

The impact was even more profound on the sub group who were not aware of the problems of over-fishing.

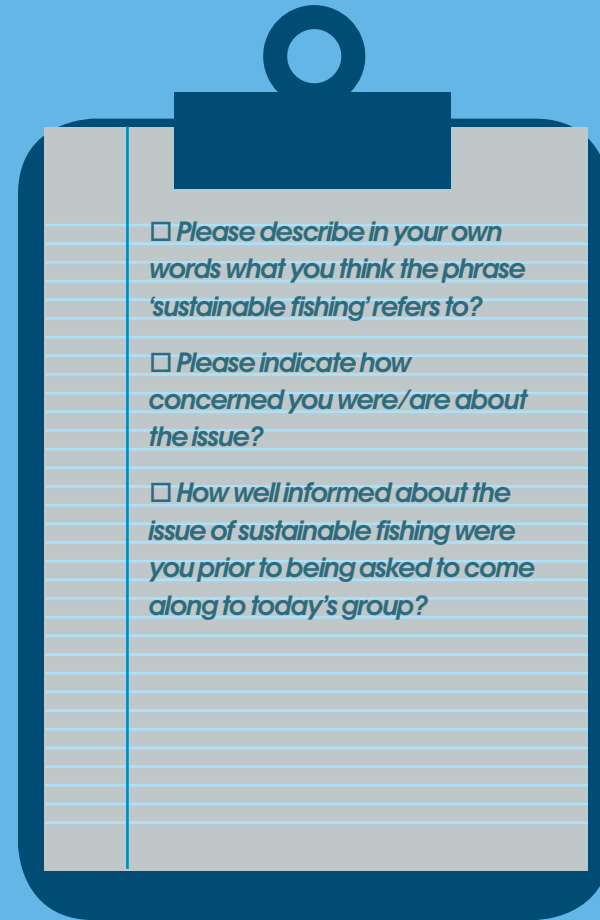
Of this group, where only 17% sought sustainable fish before watching the film, 82% said they would now try to eat sustainably.

This was encouraging data and we decided to examine consumer behaviour in more depth over time using focus groups.

In-depth Focus Groups

For a more in-depth qualitative analysis, Freud Communications conducted a focus group with consumers based in London in September 2009, showing them the film and leading a discussion on attitudes and behaviour. They reconvened the group for a second wave study in September 2010, to see if and how their attitudes or reported behaviour had stuck over time.

Headline results on attitude: The groups level of concern doubled after watching the film and even 12 months later was still significantly higher than before the screening.



Consumer Attitudes & Behaviour

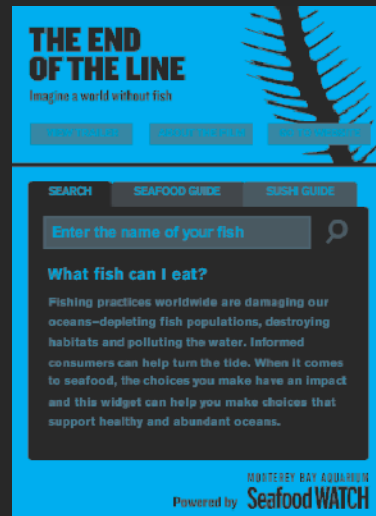
Headline results on behaviour: The focus group reported little-to-no engagement with sustainability as a purchasing criterion before the film. However this completely changed on seeing the film.

All respondents now claimed they would sometimes check or always check where the fish they are buying comes from. Twelve months later the focus group indicated they "have maintained the purchasing changes they claimed they would".

In-depth Focus Groups



FOCUS POINT: SEAFOOD WATCH WIDGET



The End of the Line website also hosted *The End of the Line* Seafood Watch Widget.

This Widget allowed you to check whether the fish you are planning to buy or eat is caught or farmed in a way that is sustainable.

By the end of September 2010, over 750,000 individuals had used the widget (from installations on multiple websites).

endoftheline.com/campaign/widget

Consumer Attitudes & Behaviour

We now had powerful evidence that *The End of the Line* would not only raise awareness and change attitudes on over-fishing but the film could also affect consumer behaviour.

Given the positive outcome of the focus group and the numbers of people in the UK who had now heard the message of the film, we wanted to see if this would be reflected in sales figures of sustainable fish.

The first results from a retailer came from Waitrose, a partner in the cinematic release of the film. The store announced a positive 15% increase in sustainable fish sales in the four weeks following the film's release, in comparison to the previous year.

Was This Change Of Attitude And Reported Behaviour Reflected In Sales Data?

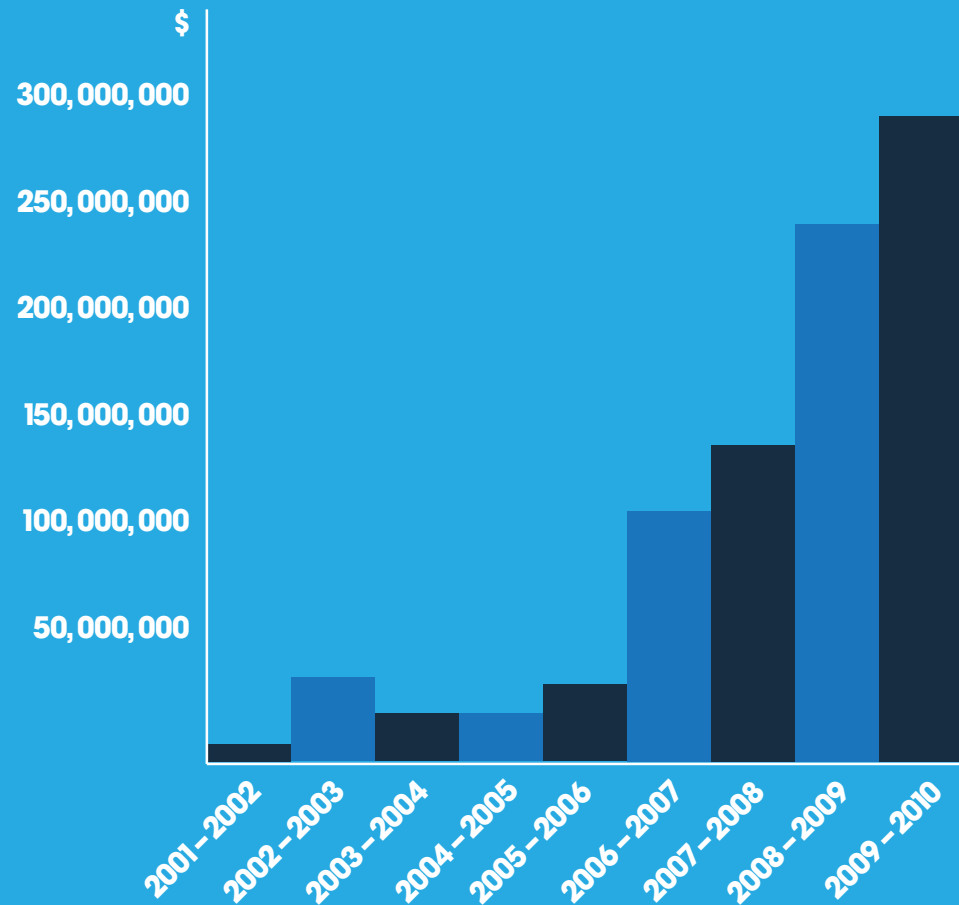
Tim Sheehan, Fish Specialist at Waitrose West Ealing was quoted in Supermarket News in July 2009 saying *"We have had more people ask about where our fish comes from than ever before – customers have had quite a reaction to the film and the issue, and want to find out more about Waitrose's involvement and our sustainable fish policies."*

Other supermarkets confirmed there had been a positive trend in sustainable fish sales during 2009- 2010, but were unable to isolate specific reasons for changed sales figures and customer behaviour.

"We have seen an uplift in sales, but the devil is in the detail; much of the uplift is due to the fact that we have introduced many more lines of sustainable fish so there is more on offer for the customer." Spokesperson for Sainsburys

The current market share of MSC products is 3.5% of total fish sales. There are now 770 MSC approved products on sale in the UK Market sold in a wide range of supermarkets and restaurants.

Estimated sales of MSC labelled products in the UK



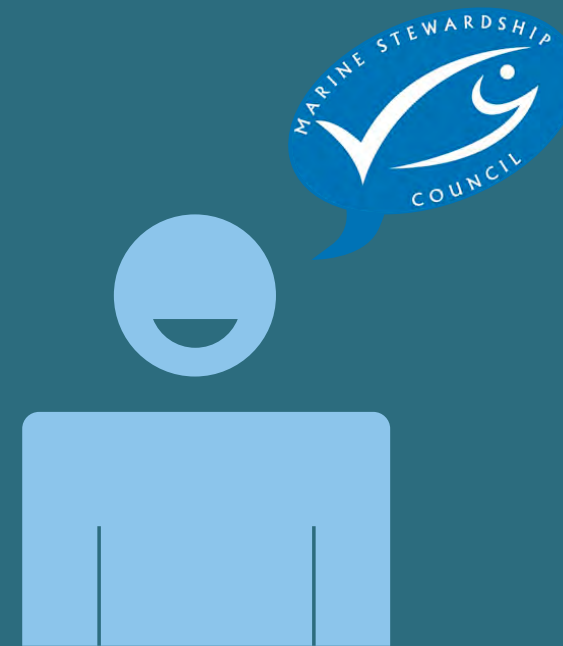
Consumer Attitudes & Behaviour

Was This Change Of Attitude And Reported Behaviour Reflected In Sales Data?

The Marine Stewardship Council is the world's leading certification and ecolabelling program for sustainable seafood. Their blue label lets customers know a product comes from a sustainable fishery.

Demand for MSC products has been rising annually since 2006 as shown in the graph on the left. In 2010 MSC UK Manager, Toby Middleton reported that "Consumer Interest in MSC certified fish has rocketed over the past two years with recent figures showing a 60% increase in recognition of the MSC ecolabel in the UK."

The film was released half way through 2009 but it is hard to prove a contribution to the growth in demand for MSC products. This would need more data such as a survey of MSC customers to correlate with the films release schedule.



Whilst studying the film's effect on consumers' intentions, we also learned about what they considered to be the barriers to change. Audiences wanted to be part of change but were honest about the problems they saw.

It was a notable that while the members of the focus group felt empowered in a supermarket setting, they reported that they were much less likely to check the source of their fish when in a takeaway or restaurant.

"I'd feel embarrassed asking in my local fish and chip shop"

Given the restaurant trade accounts for half of the fish sold in the UK, this is a very significant finding.

It was for this reason Charles Clover, the author of *The End of the Line*, developed and launched the 'Fish to Fork' website (www.fish2fork.com) which reviews and rates the fish buying policies of restaurants. It is hoped this kind of practical tool will enable consumers to make positive choices about where they eat and what they order.

"When I buy fish from a supermarket I think about sustainability but I don't think about it in a restaurant"



sustainable?

*“If it was that bad,
the Government would
be doing something more
about it, putting schemes
in place”*

*“I haven’t really seen
the issue being pushed
and it made me think
that maybe it wasn’t
so concerning at the
moment”*

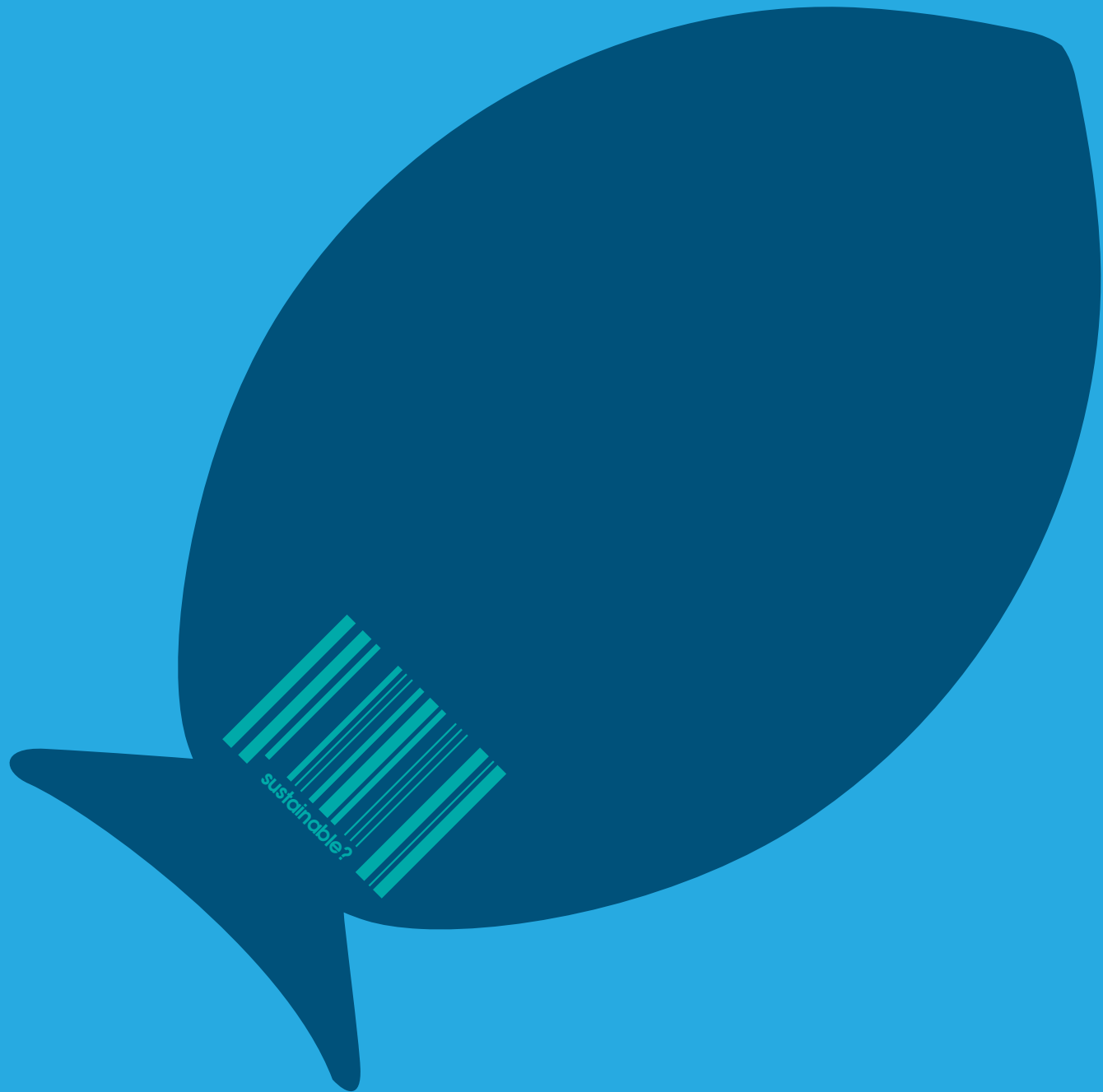
*“When I left here
last year, I didn’t
hear anything more
about it”*

Despite increased awareness on the issue, the focus group indicated people were unsure where to buy sustainable fish and, critically, that inconsistent and confusing labelling was a barrier to consumer change. These findings were echoed in the Cinema Exit Survey with 40% of the sample unaware either that sustainable fish was available or if they did how to obtain it.

This was confirmed by a Which? Report released in May 2010, which identified seven different labels relating to fish sustainability (see over the page, the seventh label not listed is the Tesco’s self-regulated label).

Whilst 80% of consumers surveyed by Which? believe supermarkets should only sell sustainable fish, a third of those surveyed didn’t recognise any of the seven labels and 40% don’t think labels give enough information.

The conclusion of the Which? Report calls for *“a move towards a standardised approach, based on Marine Stewardship Council or equivalent stands.”*



Examples of different fish labelling



Marine Stewardship Council
An independent, comprehensive sustainability label, minimising environmental and population impact. Standards comply with UN guidelines on eco-labelling.



Pole-And-Line Caught
Pole and line fishing minimises bycatch. Not to be confused with long-line fishing.



Fishing For Life
Young's own scheme. Fish haven't been sourced from an illegal fishery and, if they were farmed, this was done responsibly.



RSPCA Freedom Food
Found on farmed fish. Fewer chemicals, the fish have had more space and have been fed offcuts from sustainable fish.



Dolphin Safe
There's a variety of dolphin-friendly labels, but this doesn't indicate sustainability, as other unintended species may still be caught in dolphin-safe nets.



Global Aquaculture
Limits on chemicals and damage to the surrounding area.

Who should protect the Oceans?



Consumer Attitudes & Behaviour

The focus group feedback suggested that the lack of coherent messaging from trusted sources about the problem of over-fishing and about the potential solutions to the problem, culminated in an abdication of responsibility.

The complexity and scale of the issues led participants of the focus group to conclude that real change should come from industry and government, either to change policy to protect fish stocks or to enable them to purchase fish responsibly; that if they weren't hearing that message, then perhaps the problem was not that bad, or not our priority.

Abdication of responsibility

A recent global Nielsen study also echoes the findings of the focus group:

When asked where responsibility rested for monitoring fishing practices and protecting the sea's fish stocks, survey respondents voted for:

- Country Governments (67%)
- The fishing industry itself (46%)
- Fish manufacturers and processors (28%)
- People who buy or eat fish (19%)
- Non-Government Organizations (18%)
- Fish product retailers (16%)

Evidence shows *The End of The Line* persuades audiences of the importance of the issue of over-fishing and of the need to change their purchasing patterns.

After watching the film, audiences say they will change their behaviour and purchasing patterns and claim to maintain that behaviour over time.

High street retailers confirm change is happening with MSC reporting an average sales growth in sustainable fish of 100% year-on-year over the past five years.

But confusion surrounds where consumers can buy sustainable fish and what different labels mean.

A move towards a standardised approach such as the Marine Stewardship Council would help to embed awareness, empowering consumers to buy sustainably.

A lack of consistent information from trusted sources and lack of publicised support from government has also been seen as a barrier to consumer change.

All of the above is contributing to a sense of abdication of responsibility by consumer.

**CORPORATE
IMPACT**

“This is an impactful, well-made documentary and we welcome its intent to highlight the vital importance of protecting the world’s fish resources and its call for consumers to choose sustainable seafood”

James Turton, Group director of Sustainability and Corporate Affairs, Findus Group



Corporate Impact

The End of The Line generated a significant wave of press coverage and debate around the issue of sustainability in the oceans but how far would this impact the corporate sector?

At the time of the film’s release some supermarkets were already very aware of sustainability issues such as Waitrose, ASDA and The Co-op who had launched a marine reserves campaign with the MSC.

Corporate Impact

Restaurant staff were less aware with many offering even endangered species to customers without realising it.

Would retailers and restaurants embrace the issue or choose to ignore it? Could they become the changemakers or require government intervention to enforce sustainable policies?

Would there be a disparity between the big business and the small business response to the problem?

Waitrose **ASDA** Sainsbury’s

MARKS &
SPENCER

The **co-operative**

Supermarkets and Brands

“The profile in the media was good for the brand. It was also good for the partners at Waitrose to see us taking such a high profile stance on the issue. It helped to ensure everyone here was on the same page, helping us to continue to build on our credentials”
Quentin Clark, Head of Sustainability & Ethical Sourcing, Waitrose



As the film was released and the press campaign mounted, all eyes were on the major high street retailers. They would hold the key to offering UK consumers a sustainable choice.

Waitrose was an official partner on *The End of The Line* and made a financial contribution towards marketing the cinematic release of the film. The store associated strongly with the film both in the national press as well as in-store advertising.

Waitrose already had a commitment to sustainably sourced fish but in order to fully align themselves with the standards espoused in the film they stopped selling Swordfish.

Waitrose saw a rise in fish sales of 15% in June 2009 following the release of the film in comparison to June 2008. In 2010 their fish sales continue to be very healthy with an over-trade on fish of three times; 12% compared to their 4% overall grocery share.

Waitrose

In the same week that the film was released (and Waitrose press released about their involvement), Marks and Spencer announced it was switching all of its canned tuna to pole-and-line caught skipjack, the most plentiful tuna species, while its fresh tuna will be line-caught yellowfin.

This one retailer sells 20,000 tuna sandwiches per day and so the announcement was very significant. Whilst not referencing *The End of the Line* as a reason for the move, the timing of the announcement was unlikely to be coincidental.

Meanwhile Findus Group directly welcomed the film. James Turton, Group director of Sustainability and Corporate Affairs said,

"This is an impactful, well-made documentary and we welcome its intent to highlight the vital importance of protecting the world's fish resources and its call for consumers to choose sustainable seafood."

In April 2010 Findus unveiled plans to buy all the wild-caught fish for their Young's and Findus brands from Marine Stewardship Council certified suppliers by 2012.

In March 2010, Whiskas & Sheba became the first cat foods to source fish from Marine Stewardship Council certified products, again directly crediting the power of the film.

"The End of the Line film has had a big impact. We are now the first pet company to make a commitment to sustainable fish, and we hope that will act as a catalyst for the whole industry."

Mark Johnson, UK Manager for Mars Petcare



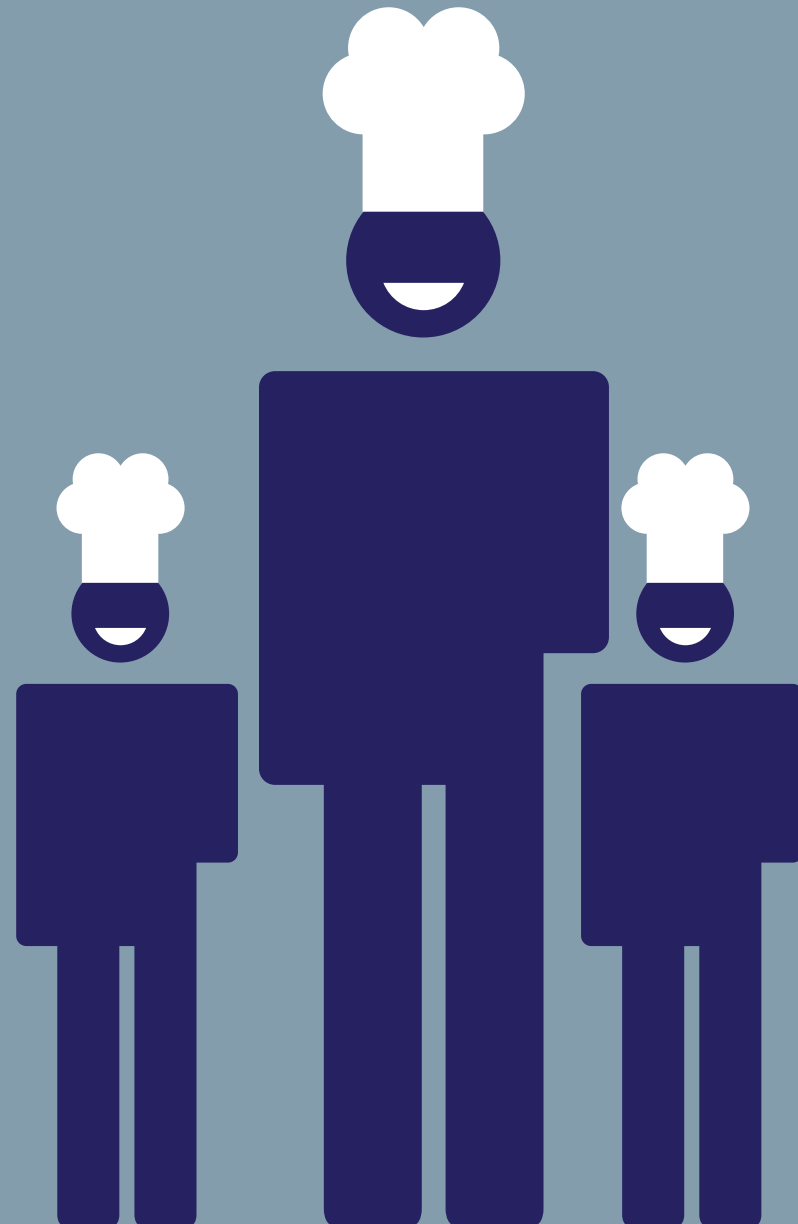
MARKS &
SPENCER

Sainsbury's

Findus Group
a passion for food

whiskas

Restaurants and Celebrity Chefs



“I can’t call The End Of The Line easy viewing – I found it shocking – but it is compelling, and essential for anyone who cares about the state of our oceans. The good news is that the film is not merely a tolling bell. Clover offers genuine, practical solutions which could turn the tide”
Tom Aikens

Given half of the fish sold in the UK goes through restaurants, the response of this sector would be another key barometer. In the wake of the release, a number of high profile restaurants publicly changed their fish buying policy with many more reports of improved information and sustainable options appearing on restaurant menus.

Gordon Ramsay, Angela Hartnett, Joel Robuchon, Giorgio Locatelli and Tom Aikens banned bluefin from their restaurants.

Jamie Oliver who was shown in the film recommending bluefin tuna on his TV show, not only stopped serving the fish in his restaurants and removed it from his recipe books, he was part of a Channel 4 season in January 2011 called The Big Fish Fight which directly assessed sustainability alongside Hugh Fearnley-Whittingstall, Heston Blumenthal and Gordon Ramsay.

Restaurants and Celebrity Chefs

Carluccio's announced they would no longer serve net-caught fish.

Aldo Zilli removed bluefin tuna from the menu at his Soho restaurant, Zilli Fish, having read about tuna fishing in The London Paper Campaign inspired by the film.

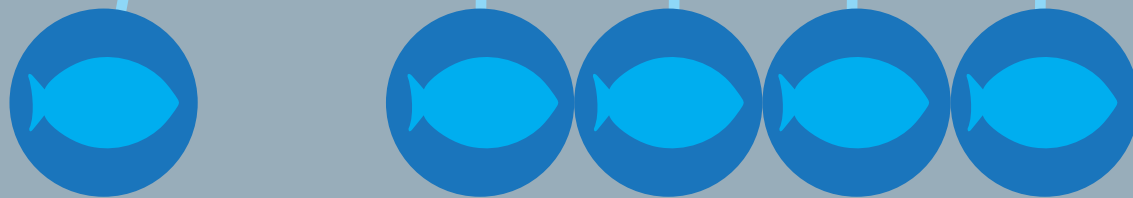
In response to direct lobbying from the filmmakers after a screening of the film, China Tang restaurant located in The Dorchester hotel, run by Sir David Tang, agreed to stop selling shark fin soup.

Compass, the world's largest caterer, banned 69 endangered species from its restaurants. Compass became the first caterer to gain Marine Stewardship Council (MSC) certification on its menus

Sodexo, Compass's main rival, then announced its intention to source only sustainable seafood. In December 2010 the company announced all of its restaurants

and cafés were serving Marine Stewardship Council (MSC) certified sustainable fish. That means more than one million people in the UK will be offered MSC certified sustainable fish in workplace restaurants, schools, hospitals and defence sites ranging from Manchester Royal Infirmary, the Co-operative and Eton College to primary schools in Wiltshire, Colchester Garrison, Blenheim Palace and Chelsea Flower Show.

There was one notable exception. Nobu, featured in the film serving endangered species including bluefin tuna, made no concessions. Despite the negative publicity generated by celebrities including Sienna Miller, Charlize Theron, Jemima Khan & Woody Harrelson who wrote jointly to Nobu asking him to remove bluefin tuna from the restaurant's menus, so they could "*dine with a clear conscience*".

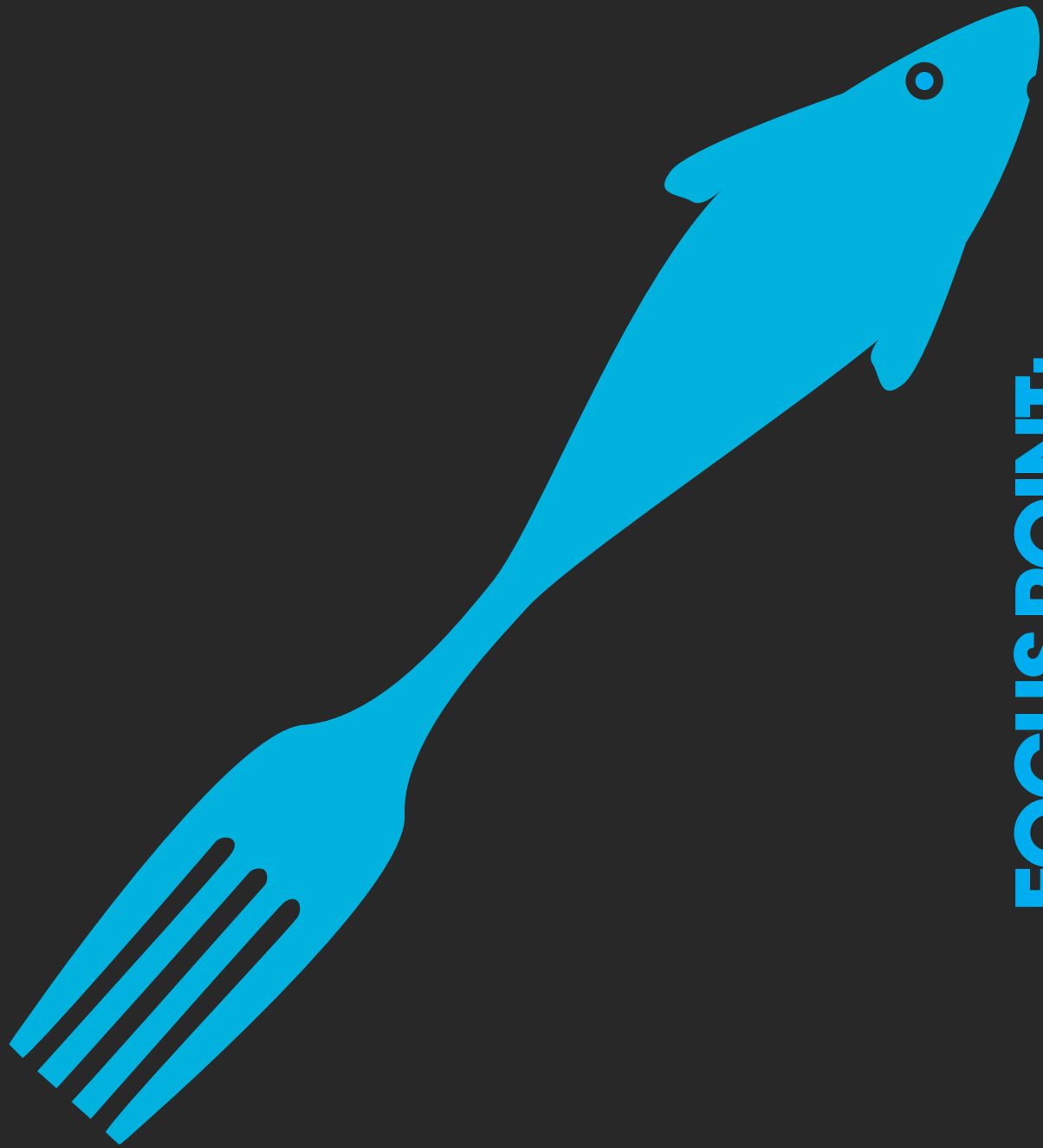




Prêt A Manger announced a total change in its fish buying policy after founder Julian Metcalfe saw the film at a preview screening and then arranged a private screening for senior management. The company press released the news on the day the film opened.

EAT, a direct competitor of Prêt A Manger, started to label their tuna sandwiches as 'Not Bluefin' in response to the heightened public interest in the issue.

“We could lose some customers in the short term, but I do feel they will eventually come back as they understand what it is all about”
said Julian Metcalfe of Prêt A Manger,
“It’s something we felt we had to do, and if it costs us, so be it”



FOCUS POINT: FISH2FORK.COM

As a direct response to the questions and uncertainty of restaurant goers, Fish2Fork.com was launched in October 2009 by *The End of the Line* team.

Fish2Fork rates restaurants that serve fish not only for the quality of their food but also for the effect they are having on the seas and on marine life.

The site rates over 400 restaurants in the UK and is the first of its kind to look both at quality and sustainability.

Raymond Blanc promoted the high rating of Brasserie Blanc on his own website, an indication of the importance of public image and increasing awareness of the importance of fish sustainability.

Small Business Attitudes To The Film

“People are just going to buy what they can afford and there is always going to be someone willing to supply them”

“I would follow the regulations but everyone needs to be on the same playing field”

“Every time a film like this comes out, people start asking more questions but they don't really care”

Whilst the response from the major high street retailers and large business was broadly positive, the position was not so clearcut amongst small business and industry representatives.

Freud Communications conducted two additional industry focus groups – one in London and one in Grimsby, made up of fish and chip shop owners, fishmongers, fish wholesalers and fish restaurant managers (a total of 8 in each group). There was a moderated discussion about the issue and then a screening of the film followed by further discussion. The group were then brought back together a year later to see if attitudes had changed.

Compared to the non-industry focus group, both industry groups started with a greater level of concern about the issue and had their levels of concern significantly raised by watching the film. However this was not maintained. Positivity towards the issue almost halved a year later, returning almost to the same levels recorded before *The End of the Line* was watched.

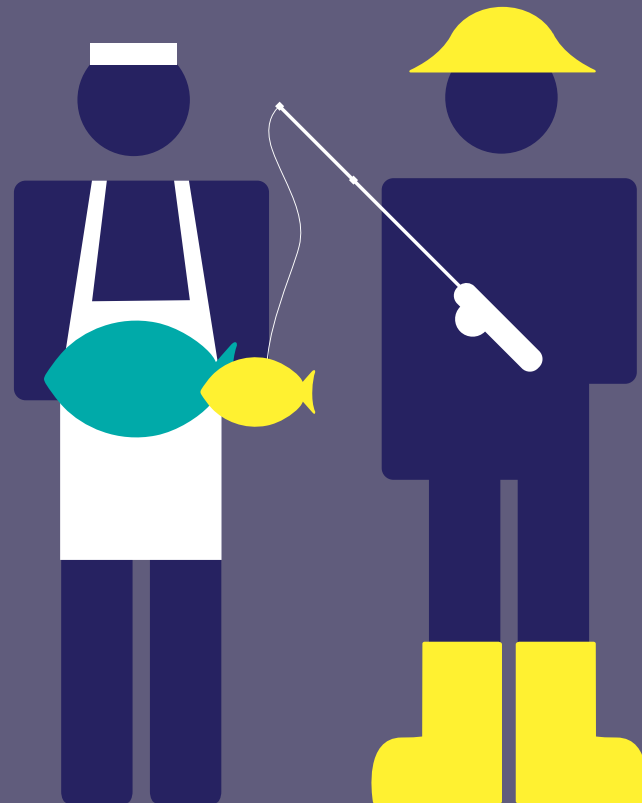
Fish Industry reaction to the film:

The industry is consumer led and believes sustainable fish is more expensive. They felt the film did not explain how to source sustainable fish cost-effectively and did not provide the business case for adopting a more sustainable model.

The industry feels stuck between supply and demand. The film encouraged them to play a more active role in educating consumers (placing information at point of purchase etc) but face a lack of labelling from their own suppliers.

There is a perceived lack of evidence on the issue. All of the evidence presented in the film was accepted but the lack of an opposing argument led to a perception of bias on the part of the filmmakers.

Lack of empowerment. They were unsure how to proceed – how to source sustainable fish and reluctant to apply pressure on their suppliers.



Corporate Impact

If they went sustainable they were concerned they would be undercut by cheaper competitors.

Small business attitudes to the film

Some of the respondents felt under attack by the message of the film and couldn't see how to align their business to the film's message.

They felt clear that change must be consumer led and they were not feeling that pull. If they went sustainable they were concerned they would be undercut by cheaper competitors. They felt a lack of regulation on labelling does not help them or the consumer.

When looking at these findings alongside those of the consumer focus group it does suggest a cyclical abdication of responsibility of the issue. Small business say the change should be consumer led, whilst the consumer demands that industry regulate their procurement and that government should also legislate to deal with the problem.

Above all, the sheer scale and complexity of the issue leads to wider disempowerment that negatively affects the pace of change.

The publicity and public awareness surrounding *The End of The Line* provided an opportunity for many companies and celebrity chefs to announce positive changes to their fish procurement policies.

The film was directly attributed in many cases and set off a chain reaction that spread

along the high street through supermarkets to restaurants and catering businesses.

It seemed the film and its attendant publicity gave companies permission, to either announce a change in policy, or highlight their own good practice which had not previously been seen as a positive marketing point.

Companies have since reported increased sales of sustainable fish in this period. This may be due to greater awareness created by the film but also increased availability and better labelling.

Small businesses selling fish were also receptive to the film and its messages but need to be convinced that consumer demand for sustainable fish will continue to grow and justify higher prices.

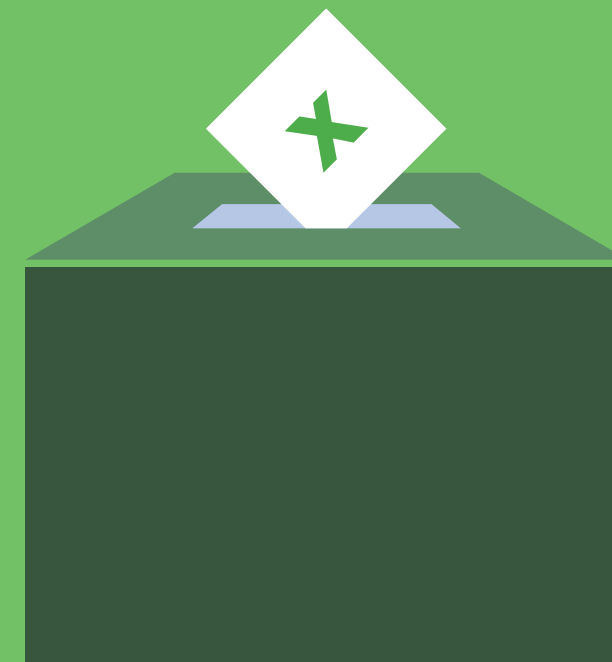
The tendency for a cyclical abdication of responsibility by small business and consumers needs to be addressed. Government policy may play a role in this.

**POLITICAL
IMPACT**

“I’ve seen the film and it’s a wake-up call for all of us. Fisheries all over the world are under increasing strain from over-exploitation and illegal fishing. We all have a responsibility as consumers to help spread the message.

Restaurants, supermarkets and other retailers have a responsibility when they know any fish is endangered to stop buying, selling, cooking and serving it”

**Huw Irranca Davies,
Fisheries Minister, July 2009**



From the outset, the team behind *The End of the Line* set out to use the film as a strategic tool to raise politicians’ awareness of over-fishing and lobby for tougher regulatory policy in the UK and internationally, as well as an expansion of marine reserves.

By piggybacking on the media coverage of the film’s release and capitalising on celebrity endorsements and the filmmaking team’s significant personal political contacts, it seemed there was a real opportunity to engage policy makers at a politically significant moment.

“Unless we address the agenda raised by that remarkable film, we will rue the day. It is a call to arms to the citizens of the world to hold the politicians accountable for the destruction of life in our seas – life on which our own well-being ultimately depends”
Bernard Jenkin MP
(Conservative)
for North Essex

The film’s release and engagement campaign coincided with the second reading of The Marine Bill on June 23rd, 2009.

Although it was too late for the film to have major impact onto the wording of the bill, the film was cited 6 times in Parliament by Conservative and Labor members on both sides of the House.

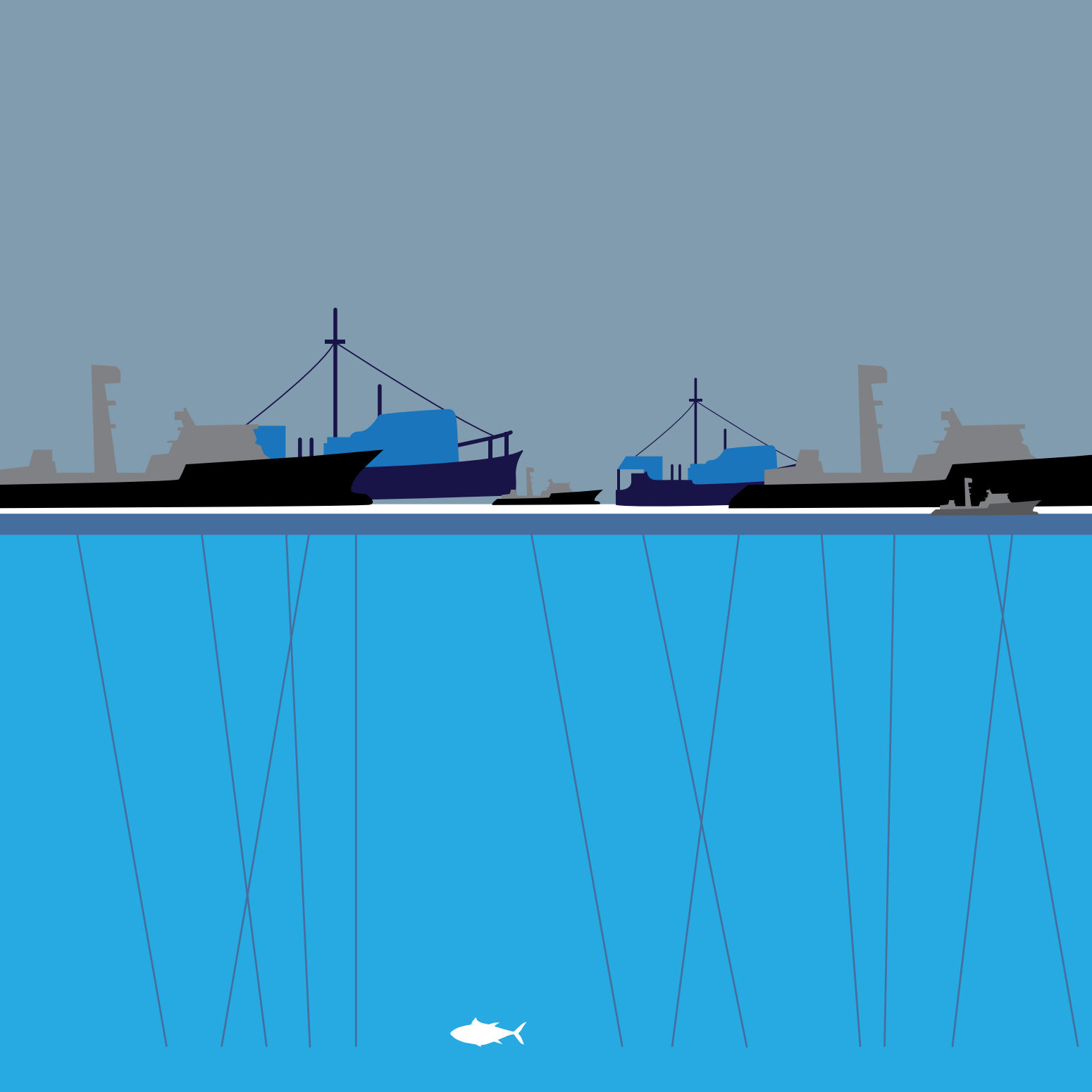
Political Impact

Both Labour and Conservative politicians watched the film and met with the film team to discuss the issue. Extracts of the film were played at both political party conferences in 2009.



In the UK

In July 2009 Fisheries Minister Huw Irranca Davies announced in an interview in The Independent that he has joined the campaign that the film inspired to boycott Nobu, leading to the headline “Minister says he will boycott Nobu over sale of bluefin tuna”. In September Sarah Brown, the Prime Minister’s wife, organised a screening at Downing Street.



Political Impact

Bluefin Tuna Campaign

The release of the film coincided with the European Commissioner's Green Paper on Common Fisheries Policy Reform and the tabling of a motion by Monaco with the Convention on International Trade in Endangered Species (CITES) to place Atlantic and Mediterranean bluefin tuna on the list of the world's most endangered species.

It became the primary campaign goal of the *The End of the Line* team to see a ban on the international trade of bluefin tuna. This was the start of months of intense lobbying across the EU to raise awareness of over-fishing and to garner support for the ban at CITES.

As part of that campaign, the film was screened in Brussels in April 2009 for members of the European Commission ahead of the publication of the Green Paper on the reform of EU Common fisheries policy. Joe Borg, Commissioner for Maritime Affairs and Fisheries took part in a panel discussion with Charles Clover.

Despite these efforts, and those of many other campaigners, the ban failed to be approved and the failure of international regulation depicted in the film continues.

“This Government is committed to the Marine Protected Area in the British Indian Ocean Territory. It will double the global coverage of the world’s oceans benefiting from full protection. We hope that the UK’s example encourages others to do the same in other vulnerable areas”

Henry Bellingham, Parliamentary Under Secretary of State and Minister for the Overseas Territories at the Foreign Office



Political Impact

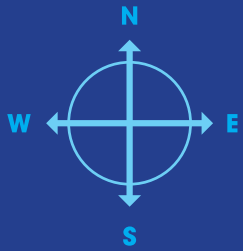
In March 2010, Charles Clover, and producers George Duffield & Chris Gorell Barnes launched the Blue Marine Foundation with the aim of funding the creation of a global network of marine reserves and providing private sector solutions for the sea.

This represents an attempt to achieve the film’s goals in other ways than through international fishing regulations.

Blue Marine Foundation and the new Public-Private Partnership Model

After a private screening of film for the Bertarelli Foundation (presided over by Ernesto Bertarelli, whose team have twice won the America’s Cup), the Bertarelli Foundation agreed to provide £3.5 million in funding to cover the policing of the new Marine Protected Area in the British Indian Ocean Territory, the creation of which was one of the last acts of the outgoing Labour administration.

No contracts have yet been signed between the Bertarelli Foundation, Blue Marine Foundation and the UK Government, but are in the process of being drawn up and William Hague the Foreign Secretary and the Bertarelli Foundation approved the deal in principle in September 2010.



Indian Ocean



Political Impact

Blue Marine Foundation and the new Public-Private Partnership Model

**The creation of new
marine reserves
described as the most
pristine tropical marine
environment on Earth.**

The Marine Protected Area will cover some quarter of a million square miles of sea around the archipelago in the Indian Ocean and have at least 60 endangered species in their coral reefs and waters. They are home to more than 220 types of coral, 1,000 species of fish and at least 33 different seabirds and have been described as the most pristine tropical marine environment on Earth.

In conjunction with national governments, the Blue Marine Foundation is continuing to look for other projects where private sector money could unlock further marine reserves.

The filmmakers were highly successful in using the film and publicity around the release, to lobby at high levels of government.

The film raised awareness in the UK within the Houses of Parliament, as well as European Commission and within international marine protection agencies.

Whilst the campaigning did not succeed in securing the ban on trade in bluefin tuna, the film may have helped to strengthen political will both here and in the EU.

The film provided a welcome new tool for campaigning groups who continue to lobby for change.

The filmmakers' greatest political success looks likely to come from side-stepping the regulatory debate and focusing on innovative public-private approaches.

PARTNER-
SHIPS

The Films Partners Included:



Garfield Weston
FOUNDATION



THE A.D. CHARITABLE TRUST

thewaterloofoundation*



Distribution and Audience Engagement Partners included:

Waitrose

GREENPEACE



Partnerships

The End of the Line had a number of partners, backing the film financially or its distribution. Other partners offered campaigning expertise and access to their networks.

Partners who came on board during production included: The Waitt Family Foundation, Marviva, The Oak Foundation, WWF, The Weston Foundation, The Clare Foundation, The Marine Conservation Society, AD Charitable Trust, GD Charitable Trust, Waterloo Foundation, Oceana and Fledgling Fund. Distribution, marketing and audience engagement partners included: Waitrose, Greenpeace and Surfers Against Sewage.

Most of these organisations were already working on issues around fish sustainability but did not necessarily have a prior relationship with film and had concerns entering a partnership. On the other hand the crisis in over-fishing was urgent and under-represented compared to other

Feedback From The Film's Partners

environmental issues, so partnering with *The End of the Line* presented an opportunity to engage with both existing and new audiences in a unique way.

Whilst the film was still in early production in 2007, the producers arranged a summit in London inviting a range of foundations and NGOs working in the field to come together. The aim was: to get the film on their radar; to share the vision and ambition of the filmmakers; to see if this coalition of organisations might be able to work together and individually with the film as a campaign tool.

It was the start of a dialogue that would last over three years resulting in many of the outputs described in this report both in the UK and internationally. As part of our evaluation we sought to find out how the investment of time and money by some of these partners paid off and contributed to their organisation's work.



Partnerships

WWF

“The film is a wake-up call to the world. WWF hopes that screening the film will boost the sustainable seafood movement and lead to the increased availability of seafood produced responsibly”

When?

WWF came on board with the film in 2007

Why?

The WWF Secretariat became involved after the film team approached a number of their national offices. WWF saw the potential of the film to create awareness and advance the debate on over fishing

Aims:

1. Increase awareness of the issues of sustainable fish
2. Advise on content in order to create the most effective campaigning film possible
3. Advise on the development of the campaign around the film
4. Engage the WWF network with the film



Partnerships

WWF: Objectives and Actions

Financial:

£50,000 contributed to production

Facilitated £100,000 of funding received from the Oak Foundation

Editorial:

Advised on content of the film to maximise impact of its message

Screenings:

Hosted a number of internal and external screenings of the film as well as setting up important influencer screenings

Campaign:

Used the film as a lobbying and advocacy tool in both the UK and Europe. The film was shown at the Labour and Conservative party conferences in 2009

Supporters:

Told their 5 million members worldwide about the film via their website and e-bulletin

Press:

Sent out releases supporting the film and highlighting the issues featured.



When asked if WWF would work with an independent documentary in this way again they replied “absolutely”

Partnerships

This was the first time WWF had engaged with a film in this way and acknowledged it enabled them to reach and engage new audiences in an unprecedented way. When asked if WWF would work with an independent documentary in this way again, they replied “absolutely”.

However, they also described tension between the demands and expectations of a large international organisation and the processes and needs of the filmmaking team. Namely deadlines being pushed back by the filmmakers, getting used to the protracted processes of film production and complexity of film distribution.


WWF: Outcomes and Feedback

Editorial:

WWF felt the film uniquely articulated the issues of over-fishing. However they originally believed that the Coral Triangle would feature in the film, which was an issue of priority to the organisation. The story didn't make final cut and Rupert Murray subsequently made a separate short film for WWF on this issue.

Engagement:

WWF facilitated a number of screenings during 2009. There was even greater demand across the WWF network prior to the release but were unable to use the film due to distribution restrictions. When they eventually were able to use the film, they were charged for screening the film, which was something they had not foreseen.



The film created a catalytic moment in a way that WWF's campaigns would never have been able to do alone.

Partnerships

Increased Profile:

WWF received press around the release of the film and continue to receive requests for speakers when the film is screened by external organisations. WWF says this has helped to engage new and diverse audiences.

Many of the celebrities involved in the campaign around the film have offered their support to WWF as a result of the film which has been valuable in terms of attracting press coverage.

WWF: Outcomes and Feedback

Campaigning:

WWF have said that the film created a catalytic moment in a way that their campaigns would never have been able to do alone, including garnering political support from the UK government.

WWF offered ideas about how the campaign around the film could be formed but did not feel they were fully consulted beyond initial discussions. For example, they were not consulted about the website and felt that they could have contributed important online campaigning expertise. Responding to this point the producers regrettably agreed they were behind schedule at this stage and when it came to the launch of the website there was no time for consultation.

Waitrose



Partnerships

Waitrose

“People ask why we are backing a film like this when our aim is to sell more fish. We do want to sell more fish, but not at any cost. That is why we are encouraging our customers to become part of the solution by considering the issues raised in the film”
Quentin Clark

When?

Waitrose became involved with the film in February 2009, after it had been completed but before its release

Aims:

1. Build on CSR commitments to sustainable fish policy by contributing to wider public awareness of the problem
2. Empower customers by providing information on issues around sustainable fish
3. Increase staff awareness on Waitrose’s strong position on the issue of over-fishing

Waitrose



Partnerships

Finance:
£20,000 contribution towards costs of the theatrical release of the film in return for branding on all marketing materials

Research:
Commissioned an independent YouGov survey to assess consumer attitudes towards sustainable fish

Media:
Waitrose used the YouGov survey statistics to attract media coverage

Briefed researchers on TV and Radio food programs to feature stories and recipes

Waitrose: Objectives and Actions

Online:
Developed a microsite
www.worldwithoutfish.com

Sent preview of the film and discount vouchers and tickets for the film via their E-zine

In Store:
Leaflets placed in over 200 Waitrose Stores

Fish counter specialists were trained to encourage customers to see the film and answered questions regarding sustainability

Trailer played in every Waitrose staff canteen

Screenings:
Organised influencer screenings with key journalists and media, political stakeholders and environmental organisations

Waitrose



Partnerships

Waitrose: Outcomes

Increased Sales:

Waitrose saw a 15% rise in fish sales in the aftermath of the film

Significant Media Coverage:

Waitrose was cited in over 1/5 of all articles that mentioned the film. This proved to be a more effective spend in communicating the issue and getting consumer engagement, than a traditional advertising campaign

Staff Awareness:

The company feels that it has increased internal awareness and motivation around the issues of sustainable fish

Customer Awareness:

There were anecdotal suggestions that customers were more engaged with the issue as a result of the film. However, Waitrose have not done further research to ascertain whether this is significant or permanent

Other:

Quentin Clark (Head of Sustainability and Ethical Sourcing at Waitrose) was appointed to the board of SEAFISH, the UK quango for the promotion of Seafood

Waitrose saw a 15% rise in fish sales in the aftermath of the film.

GREENPEACE



Partnerships

Greenpeace

“All too often the things that concern us in the ocean involve what we refer to as ‘charismatic megafauna’ – the big cuddly animals that people find so appealing. But if you really do care about whales, dolphins, seals, turtles, and seabirds, then you have to care about all the other sealife too”

When?

Greenpeace became involved following a summit about the film attended by a range of potential partners and stakeholders in June 2008

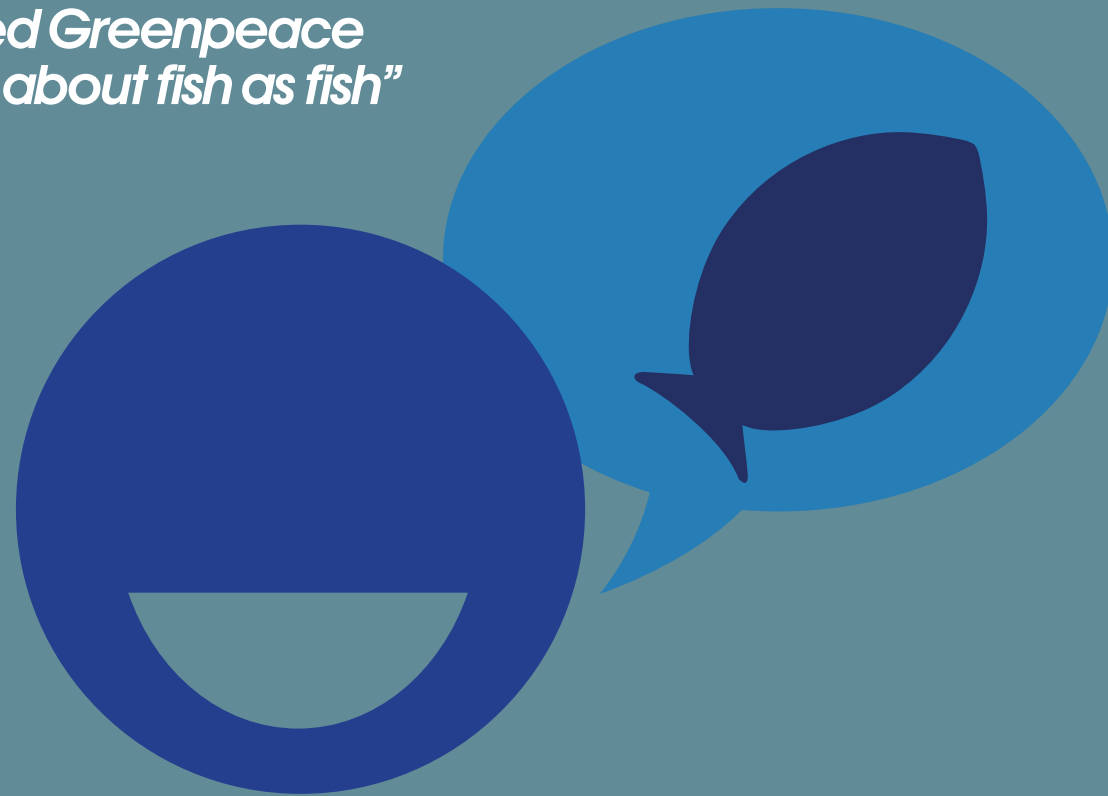
Why?

Greenpeace had an existing bluefin campaign, but it was difficult to engage people with an issue that didn't involve “charismatic megafauna”. They wanted to utilise the international dynamic of the film to tie in with worldwide Oceans campaigns

Aims:

1. Campaigning for political and restaurant reform
2. Strengthen existing bluefin tuna campaign
3. Engage new audiences and existing supporters with the issue

**“The End of the Line
allowed Greenpeace
to talk about fish as fish”**



Partnerships

Political Lobbying:

Like WWF, Greenpeace used the film as a campaigning tool, in an effort to engage politicians with the issue, particularly in Europe ahead of the CITES vote. They organised many of the influencer screenings and attended the screening at No. 10 Downing Street.

Nobu Campaign:

Greenpeace worked with Charles Clover to create a campaign to stop Nobu serving Bluefin tuna.

They worked on the celebrity letter calling for Nobu to remove Bluefin from the menu and on the week of the theatrical release of the film, protested outside Nobu restaurants in London and LA.

Greenpeace: Objectives and Actions

Engagement:

Over the last 18 months, Greenpeace has regularly contributed to *The End of the Line* Blog and Facebook page ensuring information was up to date and helping the issue to stay fresh, urgent and relevant.

Greenpeace have said that the film and the surrounding publicity gave the issue of over-fishing “kudos”. It covered key issues in their existing campaigns and offered a new way to engage with journalists.

Greenpeace felt there should have been more joined up thinking between all the NGO partners on this campaign.



Partnerships

Political Lobbying:

Greenpeace felt that the film was a useful tool in encouraging the UK Government to take on the issue of bluefin tuna, promising to lobby key territories ahead of CITES. Whilst the CITES vote did not go through, the film still played a significant role in raising the profile of the issue.

However Greenpeace felt there could have been better coordination of information particularly around CITES and felt there should have been more joined up thinking between all the NGO partners on this campaign.

Nobu:

Despite the press that Nobu received as a result of the film and Greenpeace's campaigning the restaurant did not take Bluefin off the menu.

Greenpeace:
Outcomes and Feedback

Media Strategy:

Greenpeace suggested that a Media Strategy should be conceived in advance in order to maximise campaigning impact. Responding to this point, the producers agreed they would have liked more coordination but were constricted by the lack of lead time before the release of the film as well as lack of resourcing to fully manage this stage of the process.

Cross Partnership Communication:

There were a number of incidents of overlap in terms of the work of the NGO partners. Suggested in future there should be a framework drawn up to ensure all partners are on the same page and deploying their resources in the most efficient way.



“We saw the potential of the concept, felt it provided a good opportunity to communicate these issues in an accessible manner and are delighted it was a success”

Tristram Lewis, Marine Conservation Programme Officer (Europe)

Financial:

Oak Foundation became involved with the film in 2007, awarding a £100k production grant. This was a departure from Oak Foundation’s usual funding strategy

Assessment:

The film did indeed meet Oak’s expectations and they believe it has advanced the debate on over fishing and raised awareness amongst the general public

Feedback:

When considering elements of the partnership that could have been better, Oak would like to have seen more integration with other campaigns

Most importantly, Oak would consider working with film in this way again if it fit with their priorities

The multi-partner approach of the film undoubtedly enhanced the impact the film made. The sharing of expertise and networks galvanised the campaign around the film and helped to create wide public awareness as well as a strategic lobbying tool.

Waitrose, WWF and Greenpeace all stressed how much fun they had working with the film and would do so again.

It is clear from the feedback that communication between the film team and NGO partners could have been better.

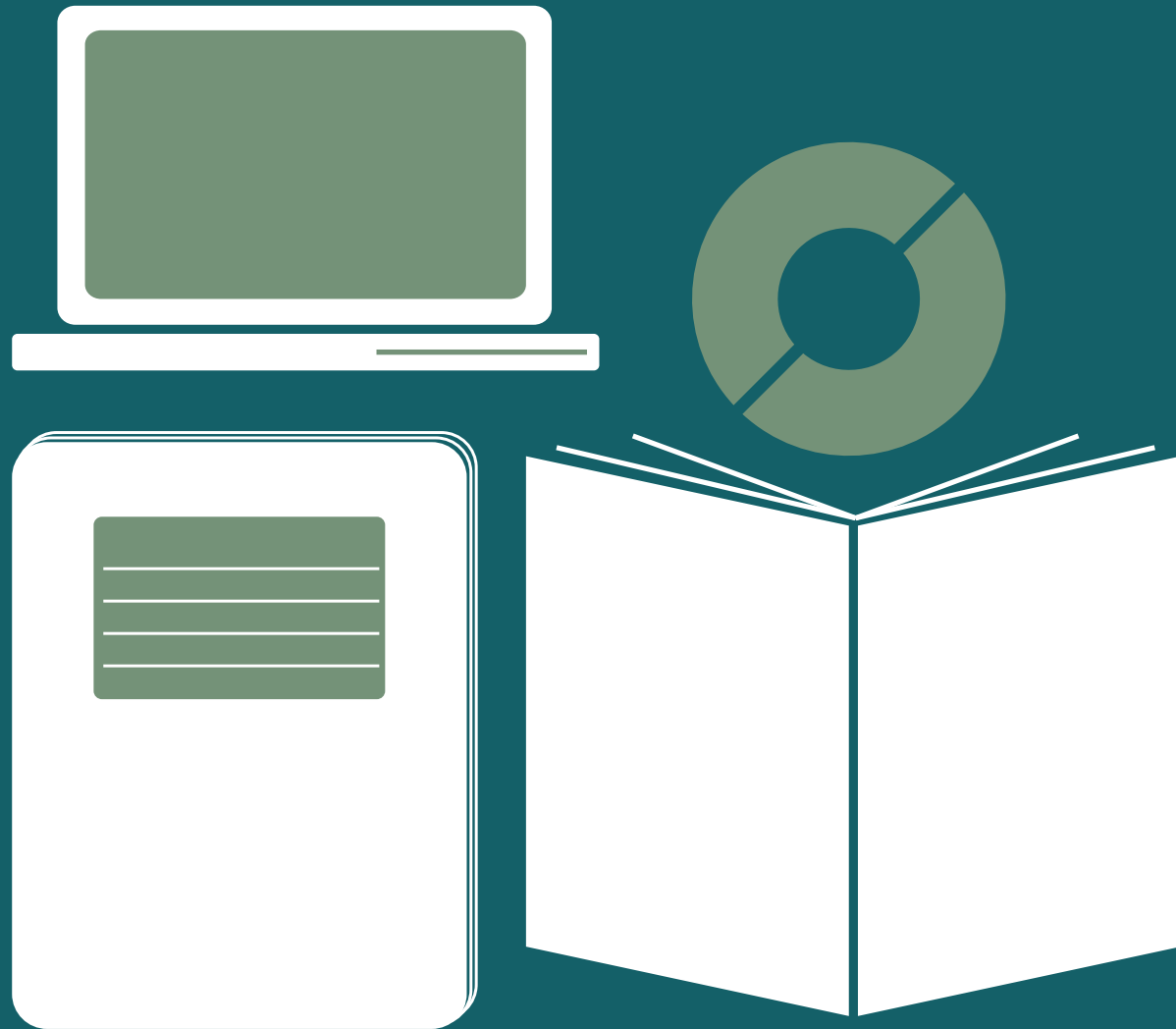
The demands and expectations of filmmakers can be different to

those organisations they have partnered with – particularly if the organisations have no previous experience with working with film.

This is particularly salient when marrying the extended and changing schedule of a feature documentary, with the times scales on which NGOs work.

Despite the substantial amount invested in the film, the producers' resources were severely stretched when it came to the distribution and campaign stage and so there was not as much co-operation between the producers and campaign partners as all parties would have liked.

THANKS



Thanks To Everyone Who Has Helped Us

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For more information or feedback about the study please contact Channel 4 BRITDOC Foundation Director, Beadie Finzi at beadie@britdoc.org

For more information on Channel 4 BRITDOC Foundation go to www.britdoc.org

In addition to information provided by the filmmakers and partners, additional research came from:

Channel 4
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Google analytics
Ipsos MORI
MediaGen
Marine Conservation Society
Neilson Global Survey
Twitter
YouGov Consumer
WHICH?