
TO: Tony Macdonald, Urban Coast Institute
FR: Kristen Grimm and Jill Fitzsimmons, Spitfire
DA: October 6, 2017
RE: Research & Recommendations on Communicating about the Blue Economy

Overview

In preparation for our session at the upcoming Mid-Atlantic Blue Ocean Economy 2030 Forum, Spitfire conducted a landscape analysis to inform our recommendations on using communications to build support for the blue ocean economy. Our analysis included:

- A media scan of nearly 100 news articles over the past year that mention the blue economy;
- Five stakeholder interviews with experts in the field representing both industry and conservation perspectives;
- A review of available polling and other research on communicating about the blue economy; and
- A social media scan of more than 9,000 conversations relating to the blue economy on 13 platforms.

The following is a summary of our key findings and recommendations on communicating about the blue economy.

Key Findings

What is the blue economy?

There are many existing definitions of the blue economy. While specific language varies, most definitions refer to the economic contribution of the oceans and the need to preserve these assets.

- *“The ‘blue economy’ concept seeks to promote economic growth, social inclusion, and the preservation or improvement of livelihoods while at the same time ensuring environmental sustainability of the oceans and coastal areas.”* ([World Bank](#))
- *“The concept of the ocean economy derives from the ocean (or Great Lakes) and its resources being a direct or indirect input of goods and/or services to an economic activity: a) an industry whose definition explicitly ties the activity to the ocean, or b) which is partially related to the ocean and Definitions and Terminology State of the U.S. Ocean and Coastal Economies 3 Definitions and Terminology is located in a shore-adjacent zip code. This is defined in part by the definition of an industry in the North American Industrial Classification System¹ (for example, deep sea freight transportation) and partly by geographic location (for example, a hotel in a coastal town).”* ([National Ocean Economics Program](#))





- “The ‘Blue Economy’ is a widely used term meaning the overall economic contribution of the oceans and coasts to the national economy and the need to address the sustainability of these natural assets.” ([Center for the Blue Economy](#))
- “[The blue economy] is a vibrant, ocean-based economy that is economically and environmentally sustainable.” ([Former NOAA Administrator Dr. Jane Lubchenco](#))
- “The blue economy is a suite of ocean industries that don’t degrade ecosystems, benefit the local, regional and national economies, and are compatible with marine ecosystems.” (Jerry Shubel)

There are a variety of estimates on the size of the blue economy worldwide, in Europe and in the U.S. The most commonly cited figure on the size of the U.S. blue economy is \$258 billion.

- “In 2010 the ocean economy comprised over 2.7 million jobs and contributed over \$258 billion to the GDP of the United States. The largest sector by both employment and GDP is the Tourism & Recreation sector, accounting for 1.9 million jobs and \$89 billion in economic output.” ([National Ocean Economics Program](#))
- “The annual ‘gross marine product’ (GMP) – equivalent to a country’s annual gross domestic product – is at least US\$2.5 trillion; the total “asset” base of the ocean is at least US\$24 trillion. Underpinning this value are direct outputs (fishing, aquaculture), services enabled (tourism, education), trade and transportation (coastal and oceanic shipping) and adjacent benefits (carbon sequestration, biotechnology). Putting it into an international context, if the ocean were a country it would have the seventh largest economy in the world.” ([World Wildlife Fund, Global Change Institute, University of Queensland and Boston Consulting Group](#))
- “Europe’s ‘blue’ economy represents over 5 million jobs and the output of the global ocean economy is estimated at €1.3 trillion today which could more than double by 2030.” ([Revolve Water](#))

In the U.S., “blue economy” usually refers to the ocean economy, but is also used to refer to the Great Lakes region.

- “Macomb County officials got together Thursday to highlight upcoming events around Lake St. Clair, promoting the county’s Blue Economy tourism initiative. ... In an annual State of the Lake address, Hackel ticked off several achievements of his Blue Economy initiative designed to increase public access, protect the environment and encourage commercial investment around Lake St. Clair and the Clinton River watershed.” (The Detroit News)
- “States including Michigan and Ohio want to guard the health of the Great Lakes and the sport fishing and boating industries they support from the notoriously destructive Asian carp. ... ‘This is a vital piece of our blue economy, but this is not merely a blue highway,’ said Huizenga, a GOP co-chair of the House Great Lakes Task Force.” (The Detroit News)



Who is talking about the blue economy?

The blue economy is a concept that is gaining traction among academics, conservation groups and international governance organizations, but is mostly limited to those spheres.

- *“The Blue Economy represents a relatively new manner of describing ocean economic development that began to emerge first among many island nations... It’s now gaining recognition in some of the world’s biggest and most powerful nations, including China and the United States, which have increasingly begun to turn to the concept of the Blue Economy to promote development of their ample ocean and coastal resources.” (Center for American Progress)*
- *“Oceans, say advocates, are often considered an ‘orphaned’ environmental issue - away from most people, out of our sight, largely outside of national borders. Yet increasingly, scientists are aware of just how much the changes in oceans affect humanity, and buzzwords like ‘blue economy’ - using the sea sustainably - are getting tossed about with increased frequency.” (The Christian Science Monitor)*
- *“There’s a very academic conversation that is happening around this and it has been collecting different people’s definitions and trying to rationalize them. And I think that is very much an academic exercise.” (Mark Spalding)*
- *“People are talking about the blue economy in academic circles. But I don’t really know what it means.” (Bob Vanasse)*

Some emerging industries, especially in marine technology, consider themselves part of the blue economy. But traditional industries such as oil and gas, fishing and shipping are less familiar with the term or don’t see how it connects to their work.

- *“I think that it’s fair to say that nobody in the oil and gas industry and nobody in the fishing industry is jumping up and down and positive about the blue economy. If we think about shipping, there’s probably some people thinking about it. If we think about sensors and exploration, there’s probably people thinking about it. But some of these oil and gas and fishing industries aren’t.” (Mark Spalding)*
- *“In San Diego, we have this cluster of organizations that consider themselves to be part of the blue economy, but they’re all marine technology companies, so they’re not the kind that people would normally think of, in terms of using the ocean.” (Jerry Schubel)*
- *“I don’t really use [the term] that much. The blue economy is a term that’s more environmental and connected to the stewardship of the ocean... I don’t think ports see themselves that way. Their ownership and management structures are so different so often times they don’t think of themselves as part of the blue economy, but that’s an issue that’s starting to change.” (Carleen Walker)*
- *“Beverage companies, they’re starting to get there that they’re polluting our oceans. Whether they are willing to admit that is another thing.” (Rob Vernon)*

Commented [MT1]: How about the WOC crowd....It is I think a frame around which international governance organizations re engaging business sectors, including investment community. (See upcoming WOVF forum)

Commented [KG2R1]: Contextual. International governance engaging biz sector with frame.

Starting to become a bridge. Green ports initiative E.U. It is becoming an acceptable pathway for engaging more effectively with business community.



- *“I represent the fishing industry. I’m not sure what people mean by the blue economy. How would you explain it? I asked Greg (Greg DiDomenico of the Garden State Seafood Association) and he didn’t really know what it means either.” (Bob Vanasse)*

Where is the conversation happening?

The blue economy and “blue growth” have gained traction in some coastal countries, particularly in Europe, where they have informed policies and industry practices.

- *“I think “blue growth” has gotten traction in Europe and is part of the European communities' official policies and programs. I think it's gotten traction in China and a couple of other places. I don't know that the separate phrase blue economy has necessarily gained as much traction anywhere.” (Mark Spalding)*
- The top influencers talking about the blue economy on social media are the European Commission, the World Bank, the Manila Bulletin News, the Nature Conservancy and the University of Western Australia.
- An internet search found that most resources on the blue economy came from international organizations such as the World Bank, the United Nations and conservation organizations.

But in the U.S., issues related to the oceans and the blue economy are low on the priority list for policymakers and their constituents.

- *“Most people on Earth, even those living in land-locked countries, depend on the ocean – for food, relaxation, shipping or dozens of other benefits that humans get from the seas. Today, however, the problems facing the ocean rank low on the priorities for many communities: In one survey from the U.S., respondents put ‘the condition of the world’s oceans’ 10th on a list of 15 environmental issues that they were extremely or very concerned about.” (Future Earth)*
- *“It’s clear the U.S. has the largest exclusive economic zone, and recent UN studies have pointed out that out of all the nations in the world, we have the greatest potential to make a major contribution through aquaculture. We’ve had some of the leading developments made in this country, but very few of them have been implemented in the U.S.” (Jerry Schubel)*

Within the U.S., the conversation is happening primarily at the local level in coastal states.

- Our media scan found that 92 percent (90 of 98) of news articles that mentioned the blue economy over the past year were published in local papers. Most of these papers are located in the Northeast, the Great Lakes region or the Pacific coast, where blue economy issues are directly relevant to local communities.
- On social media, the conversation around the blue economy is predominately taking place in California, New York and Washington, D.C.



What frame is dominating the conversation?

In the media, the dominant frame around the blue economy is one of economic might and opportunity. The importance of marine conservation and protection is often mentioned secondarily as necessary to maintain economic prosperity.

- *“The ocean is essential to the livelihoods and food security of billions of people around the globe. Shipping, tourism, transport, fisheries, oil and gas, renewable energy all depend on the sea. Two years ago, economists put a dollar value on what our oceans are worth and came up with \$24 trillion. If it were a country, the sea would be the seventh-largest economy on the planet. ‘When you look at the blue economy, it has an asset value of \$24 trillion and that’s delivering something between \$4-500bn each year in terms of the dividend to humanity,’ says Professor Ove Hoegh-Guldberg, director of the Global Change Institute.” (Al Jazeera)*
- *“New England’s ocean economy supports more than 230,000 jobs and brings in \$16 billion, much of it from tourism and recreation. A healthy ocean, with abundant populations of fish and other sea creatures, is vital to these industries.” (The Boston Globe)*
- *“The fishing industry creates income and jobs that drive the blue economy and are valuable to the entire local community. ... Behind this economic engine are the incredible stories of the Cape’s fishermen and those who rely on it to make a living.” (The Cape Cod Chronicle)*
- *“Vibrant coastal waters are key to California’s ocean economy, valued at \$45 billion and employing more than a half million people.” (The East Bay Times)*
- *“The Blue Economy Project, a joint effort between the Cape Cod Chamber of Commerce and the Cape Cod Commission, estimates that companies that are engaged in the Cape’s maritime economy, be it through industry, environment, education or infrastructure, bring in \$1 billion in revenue a year.” (The Patriot Ledger)*
- *“Wetlands provide a substantial economic base through ecotourism and recreational activities - hunting, fishing, boating, swimming, bird-watching, and relaxation. Property values depend on scenic views of healthy wetlands. Wetlands are our “Blue Economy” on Cape Cod.” (The Cape Cod Chronicle)*

Conservationists and aquariums emphasize the need to balance economic growth with sustainability and environmental protection.

- *“As a public aquarium, we feel it’s important to make our visitors aware of the very strong probability that we will turn to the ocean in the future for more energy, more food, more shipping, more transportation, and more pharmaceuticals. So the question is how do we do this in a way that does not damage marine ecosystems? I think it needs both to conserve marine life and marine ecosystems, and it has to benefit the economy. So to me, they’re coupled.” (Jerry Schubel)*

Commented [MT3]: Again emphasize the positive...frame as an opportunity....

Commented [KG4R3]: Teaser to where we are going to go. Assessment is what it is. This is the opportunity.



- *“The first thing that comes up is the commerce aspect of it, moving goods here and there, and also commercial fishing. Those are the two biggest things that come to mind. It’s the impact that these two particular things have on wildlife and their ability to thrive.” (Rob Vernon)*

What are the obstacles to building support for the blue economy?

The primary challenge is lack of awareness or attention to ocean issues. For many Americans, the oceans are out of sight, out of mind.

- *“Oceans, say advocates, are often considered an ‘orphaned’ environmental issue - away from most people, out of our sight, largely outside of national borders. (The Christian Science Monitor)*
- *“It simply comes down to awareness, people just haven’t been able to grasp the concept. Once you explain it to them, they’re like ‘oh yea that makes sense.’ Sometimes it’s as simple as that. I think the biggest obstacle is just awareness, people don’t understand it.” (Rob Vernon)*
- *“The disconnect is the public’s lack of understanding of how dependent it is on the blue ocean economy. If they don’t see it they don’t think about it. They think gas comes from the pump and clothes comes from the rack at Old Navy. They don’t think about where their fish come from.” (Carleen Walker)*
- *“Also significant, but poorly understood, is the Waterkeeper’s goal of shepherding the creation of a ‘blue economy,’ which simultaneously uses and respects the region’s tremendous water resource.” (The Buffalo News)*
- *“No one lives in the ocean, so they don’t identify with it. People don’t think of it as economic contributor.” (Mark Spalding)*
- *“We haven’t done a good job of making the public aware of how important the ocean is in their lives and for their future.” (Jerry Schubel)*

Among groups that comprise or advocate for the blue economy, there isn’t a shared definition of the term.

- *“Nobody really knows what the ocean economy is. It’s not tracked separately when it really comes down to it. Which industries fall into it? It’s not clear or defined.” (Mark Spalding)*
- *“Not a lot of people are talking about the blue economy like it’s a thing. It simply comes down to awareness. Mostly what [organizations] would have to do is figure out a way to show how a thriving blue economy impacts people locally—try to relate it to guests.” (Rob Vernon)*
- *“When I hear the term, I’m thinking about industries that are making money through utilizing the ocean. But there is a whole other sector focused on mitigating impact on the environment.” (Carleen Walker)*

Commented [MT5]: This seems to me to be key....How can broader more extensive communication around the blue economy “frame” discussed above raise awareness and significance about the ocean issues including fisheries, energy, ports and other sectors currently not engaged

Commented [MT6]: The start of a message that should resonate across sectors.

Commented [MT7]: Start here add Blue economy magnify by many group speaking + ocean awareness, action and funding



Industry leaders aren't communicating publically about their role in the blue economy.

- *"People think of shipping as polluters. The only time the public hears about ships is when there is an accident. ... There is resistance from the industry to PR. They don't want to be seen, because their experience with the press has been negative."* (Carleen Walker)
- *"I never use the term 'blue economy.' It's not something we talk about in the fishing industry."* (Robert Vanasse)
- *"The shipping industry is a very fragmented industry. There is no global body promoting our activities."* (Carleen Walker)

The threats facing the ocean are daunting, and can lead to a sense of hopelessness.

- *"A lot of the research shows that as different ecosystems go extinct, whole regions of the ocean become dead and are therefore impacting climate. That's the biggest reason to want to make a change. Species extinction is a hard concept for some people to grasp and nobody wants to be responsible for that."* (Rob Vernon)
- *"There are too many articles on how the ocean is sick."* (Jerry Schubel)
- *"Overfishing and depleted fish stocks? The answers are relatively clear, and in many places, we're already headed in the right direction. Marine pollution and plastics? Trickier, and we're farther from enacting solutions. Warming seas and increased acidification? Complex, daunting, and impossible to solve without addressing climate change itself."* (The Christian Science Monitor)

Recommendations

Based on our research, we have developed the following recommendations on how stakeholders can communicate more effectively about the blue economy:

1. **Clearly define the blue economy and its magnitude.** Stakeholders and advocates must deliver clear and consistent messages about the blue economy to cement the concept in the public consciousness. This requires a shared understanding and language around what the blue economy is, who is part of it, how large it is and why it's important. As the term gains more traction, it will drive discourse about how to expand, strengthen and protect the blue economy.
2. **Cultivate diverse and trusted messengers.** To counter the perception that the blue economy is purely an academic concept, engage industry, community leaders, recreational fishermen, retailers and others who can speak to the real-world benefits of a vibrant blue economy.
3. **Hone in on local and tangible benefits.** To reach people who feel disconnected from the blue economy, highlight how it benefits them and their families in their everyday lives. Demonstrate how their livelihoods and standard of living depend on the blue economy – even if they don't live near the

Commented [MT8]: More on compatibility ...not only conflict!

Commented [MT9]: What seems to be missing here is...linking o key targets s audience and what actions do we want to spur, changes we want to see? Making the case that the diverse and disconnected stakeholder in the Blue Economy stand to benefit from this communications frame...

Commented [KG10R9]: emphasize role they play

Commented [MT11]: These are good but seem a mix of what came out of research and best practices, which is OK.

I hope and expect that the basis for these recommendations will / can be fleshed out based on information provided in papers and discussions during the workshop

Commented [KG12R11]: KG to meet with Carl and Tony Friday morning to update anything as needed



ocean. In coastal states, underscore how a thriving blue economy impacts their local community, creates jobs and generates economic benefits.

4. **Use storytelling to bring the benefits of the blue economy to life.** Stories are more personal and more memorable than statistics. Spotlight people who your audiences can relate to and tell stories about how they benefit from the blue economy.
5. **Emphasize the link between thriving oceans and a strong economy.** When it comes to the blue economy, we don't need to choose between prosperity and the environment. In fact, healthy oceans are essential for the industries that rely on them to thrive. Avoid messaging that values one goal ahead of the other, and instead articulate how they are interconnected.
6. **Avoid doom and gloom.** While it's important to instill a sense of urgency around environmental threats to the oceans, creating a sense of hopelessness can lead people to give up and disengage. Emphasize that the challenges we face are solvable, and highlight readily available solutions that will enable us to make progress towards healthier oceans and a stronger blue economy.
7. **Lean into a hopeful, forward-looking frame.** Focus on the opportunities associated with the blue economy rather than the problems that necessitate it. Inspire a sense of hope and possibility for the future.
8. **Utilize existing communication channels.** Consider where the public currently encounters information about the oceans and what opportunities you have to reach them through those channels. For example, consider partnering with aquariums, cruise lines, the Discovery Channel, waterfront resorts or seafood markets to spread the word about the blue economy.
9. **Target business media outlets to engage industry.** Focus media outreach efforts on publications that will reach blue economy industry leaders, such as the Economist, Bloomberg Business Week, the Wall Street Journal, Forbes, CNNMoney and CNBC. Package industry data from various blue economy sectors quarterly so that you can pitch stories about the strength and growth of the blue economy.
10. **Promote the blue economy with a unified voice on social media.** Develop consistent messaging and a shared hashtag to connect the conversation around the U.S. blue economy on social media. Consider hosting Twitter chats that include both industry and conservation voices, and invite participants to submit their questions about the blue economy.
11. **Be strategic about your timing.** Take advantage of natural communication opportunities when your audiences will already be thinking about the oceans, such as Shark Week, World Oceans Day, the start of fishing seasons or holiday weekends when more families will be vacationing on the coasts.
12. **Invest in research to test messages among key audiences.** Our scan turned up very few relevant polls about the blue economy and related issues. Conduct polling or focus groups to identify which messages and messengers are most compelling to your priority audiences.



Next Steps

We look forward to sharing our findings and recommendations at the Mid-Atlantic Blue Ocean Economy 2030 Forum. In the meantime, please contact Kristen Grimm at kristen@spitfirestrategies.com or Jill Fitzsimmons at jill@spitfirestrategies.com with any questions.



Appendix: Methodology

Earned Media

We used LexisNexis to pull all U.S. news coverage that mentioned the “blue economy,” “blue ocean economy” or “ocean economy” over the past year. Our results included 98 articles from 57 newspapers, including:

- USA Today
- The New York Times
- The Boston Globe
- Los Angeles Times
- The San Diego Union Tribune
- AP Planner
- Alaska Dispatch News
- The Buffalo News
- West Hawaii Today
- Charlotte Sun
- Fraser-Clinton Township Chronicle
- Richmond Times Dispatch
- Edison-Metuchen Sentinel
- The Westerly Sun
- The Cape Cod Chronicle
- The Swampscott Reporter
- The Banner
- The East Bay Times
- The Mercury News
- Marin Independent Journal
- The Detroit News
- The Cape Cod Chronicle
- Mount Clemens-Clinton-Harrison Journal
- The Cape Codder
- Star Tribune
- The Manistee News Advocate
- The Biloxi Sun Herald
- The Patriot Ledger
- The Cape Cod Times
- Daily Advertiser
- Hattiesburg American
- Muskegon Chronicle
- The Register
- Portland Press Herald
- Bridgewater Independent
- Albuquerque Journal
- Asbury Park Press
- The Sentinel
- Monterey County Herald
- Charlevoix Courier
- Grand Rapids Business Journal
- Carriage Towne News
- Beverly Citizen
- Florida Today
- Florida Times-Union
- The Carteret County News-Times
- The Daily Record of Rochester
- The Holland Sentinel
- Courier-Post
- The Record
- The Westerly Pawcatuck Press
- St. Clair Shores Sentinel
- Old Colony Memorial
- The Monroe News
- Monterey County Weekly
- DC Daybook
- The Washington Daybook

Social Media

We conducted a social media scan using the social listening tool Nuvi to capture the conversation happening online around the blue economy, using the keywords “blue economy,” “blue ocean economy,” #blueeconomy



and #blueoceanconomy. Our scan included more than 9,000 mentions on the following 13 platforms over the past three months:

- Twitter
- YouTube
- Google+
- Instagram
- Reddit
- Blogs, News, RSS
- Tumblr
- Automatic
- VK
- StackOverflow
- Disqus
- Pinterest
- Facebook (Beta)

Polling

We reviewed the following publicly available polls that relate to the blue economy:

- World Ocean Summit Poll: http://wwf.panda.org/what_we_do/where_we_work/coraltriangle/news/?303650/Guidelines-for-going-Blue
- Gallup poll on environmental protection vs. economic growth: <http://news.gallup.com/poll/1615/environment.aspx>
- Yale AP-NORC Environment Poll: <http://climatecommunication.yale.edu/publications/finding-common-ground-at-the-thanksgiving-table/>
- Defence IQ survey: <https://www.defenceiq.com/naval-and-maritime-defence/articles/protecting-blue-economy-requires-survey-vessel>