



Constant Cravings: The European Consumer and Sustainable Seafood Choices

Following groundbreaking work to chart the attitudes of U.S. consumers toward sustainable seafood, the Seafood Choices Alliance, a nonprofit trade association, has undertaken a similar marketing research effort in Europe, where it expanded its programs earlier this year. The Alliance's goal is to empower the seafood industry – from fishermen and fish farmers to distributors, wholesalers, retailers and restaurants – to join with consumers to transform the seafood marketplace into a more environmentally sustainable one.

The research findings presented here are truly timely. Conservation organizations are working now more than ever to raise the awareness of their members and the broader public about the growing body of scientific evidence pointing to the crises facing the world's fisheries. The work of the Marine Stewardship Council is bringing increasing amounts of eco-certified seafood to supermarkets throughout Europe. At the same time, there is growing and global recognition from entities as diverse as the United Nations and Unilever that bringing sustainable practices to fisheries is a must if we are to continue to enjoy seafood.

This report presents the key findings of the Seafood Choices Alliance's first marketing research effort in Europe, which was undertaken in collaboration with the Alliance's European NGO partners: the Marine Conservation Society (UK), The North Sea Foundation (The Netherlands), Greenpeace, and WWF. UK, Germany and Spain, which are of particular importance due to population size and the market for seafood consumption. The research findings support the hope that one day, the world's currently overexploited fisheries will be carefully and sustainably managed.

Research Objectives

There were three main objectives for the Alliance's consumer research effort in Europe:

- How do European consumers think about the ocean environment and what is their level of concern for it?

(Insert logos of 4 NGO partners along bottom of first page)

- How much and what is understood about the cause and effect of problems specific to fisheries and aquaculture?
- How does their understanding of the state of the ocean currently impact buying behaviour? What is the potential for purchasing behaviour to shift in favour of sustainable seafood?

To answer these questions, the Alliance worked with the UK-based marketing research firm RSM to coordinate a two-phase research effort in each of three countries. (For more on methodology, see the methods section at the end of this report.)

Key Findings

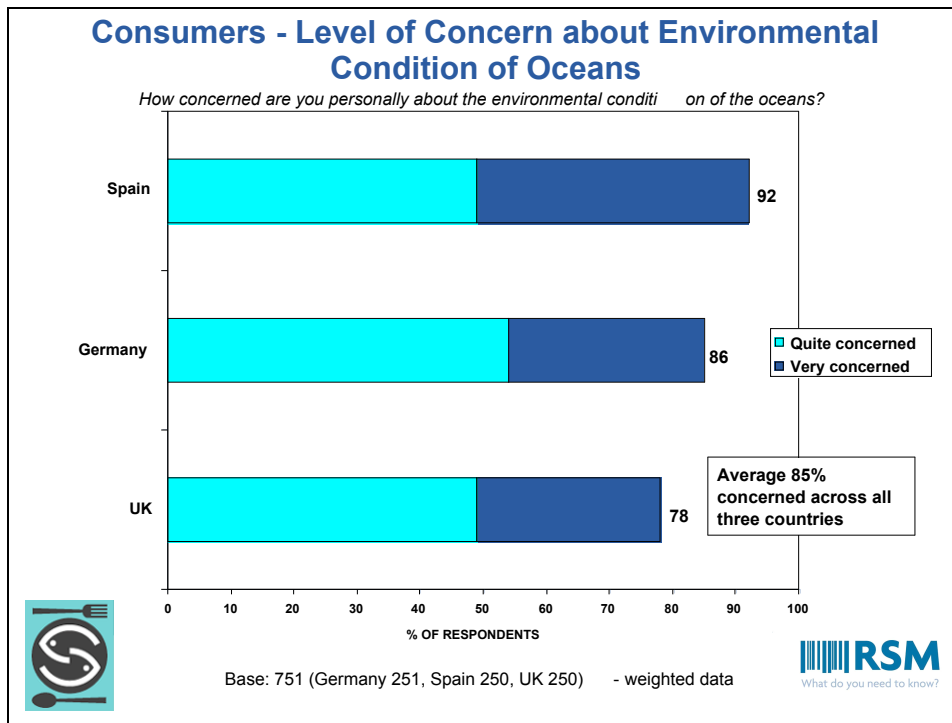
The Alliance's findings present a compelling story of European consumer desire to maintain and improve the health of the world's oceans and their willingness to use seafood consumption as a tool to save the seas.

- Broad concern exists for the current state of the oceans, and while the effects of overfishing, bycatch and bad farming practices are widely known there is lack of detailed knowledge.
- Seafood is becoming a staple of the diet fuelled by its perception as a healthy alternative to meat.
- While environmental concerns are secondary to quality and price as purchase criteria, they still rank high and concern is mounting.
- Supermarkets are the key source of seafood in Germany and UK, rivalled by market stalls in Spain. Unlike the United States, restaurants are not central to the consumption of seafood in these countries.
- Consumers want more information on sustainable seafood and point of purchase labelling.
- They also want government and retailers to bear most of the responsibility for providing sustainable choices.
- There is a great deal of consistency in attitudes and desires across the three countries.

Highlights

Consumers in all three countries (85% on average) express a great deal of concern about the current state of the oceans. Comments in the focus groups highlighted worries about the pollution of the ocean and inability to consistently enforce regulations to protect the ocean at a global level – leaving some countries to continue harmful practices.

“We dump all our crap into [the ocean], we over fish it. It’s going to be full of toxins and waste products. So there is not going to be a lot left in there.” [UK, 18-34]



When asked to consider information relative to seafood, substantial numbers are aware of overfishing and by-catch issues. In focus groups, a number of respondents noted that fish they used to eat now seem unavailable, replaced by other species and often farmed fish.

“When I was 18 years old...herrings were a normal Saturday dinner. Now, herring is so expensive. I mean it is great to eat herring, but it used to be a poor people’s food.”

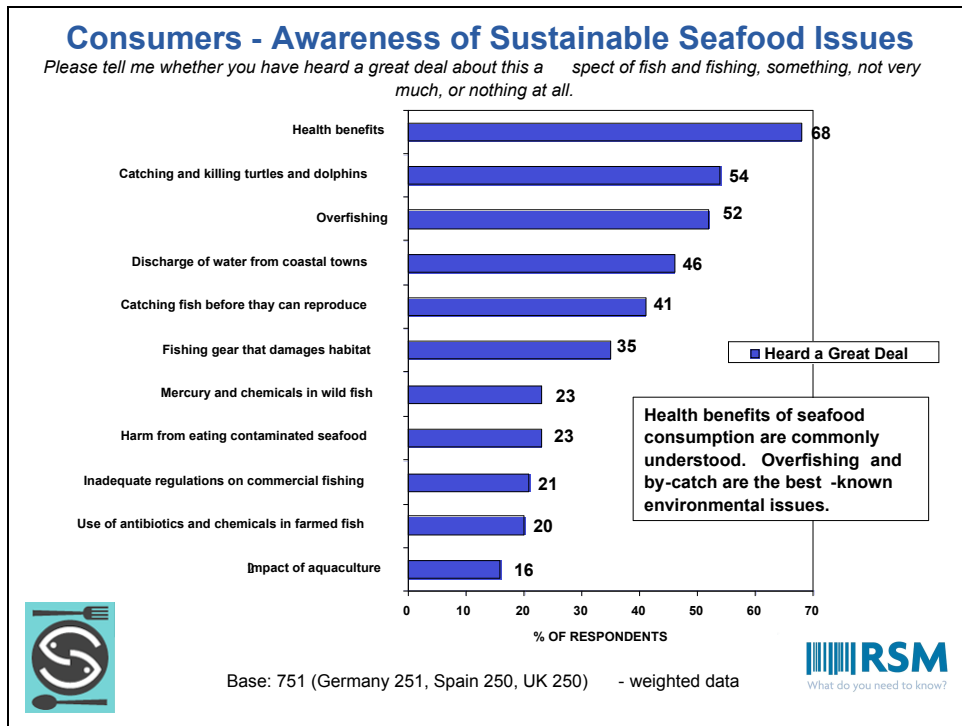
“Look at cod ... they caught all the cod now. So, it is so expensive and hard to get.”

“There are no fishing boats anymore. If you go walking at the Baltic Sea ... say Niendorf, then they only do it for the tourists.”

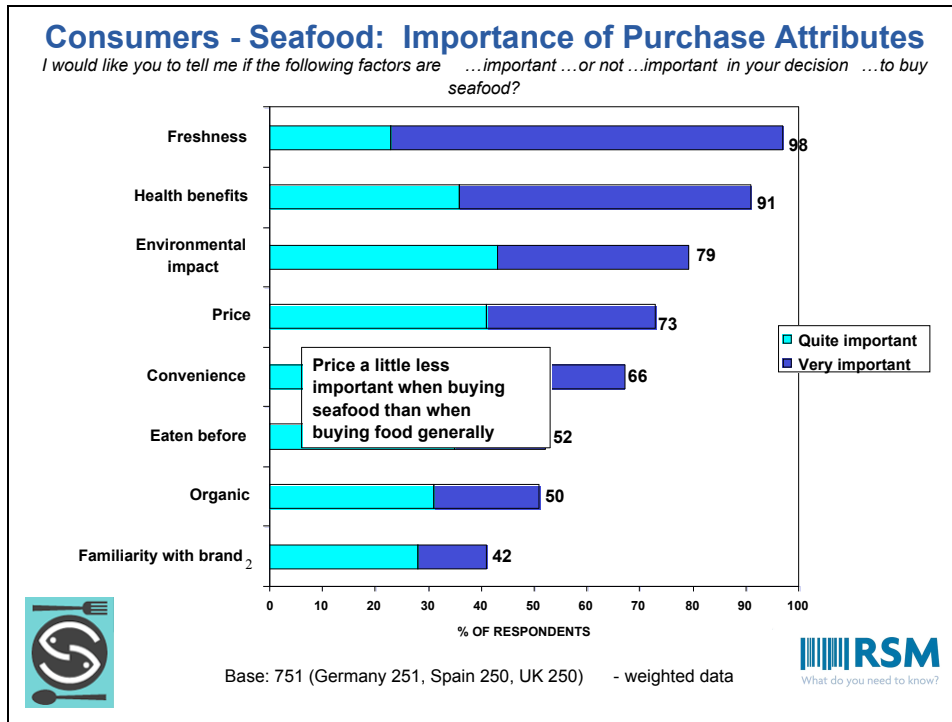
“Salmon has sort of taken over the herring now. Salmon is as cheap as herring used to be.”

-- German consumers discussing fish

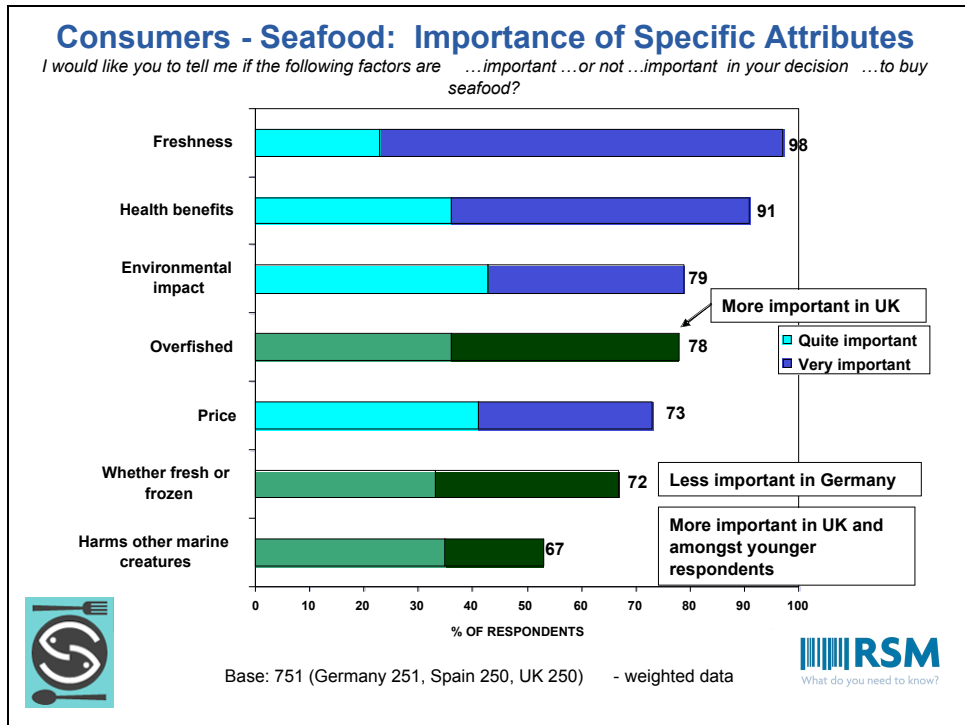
Although health benefits of eating fish are most known to consumers, more than half (54%) are aware of turtle and dolphin by-catch and overfishing in general. Although there is much less knowledge of environmental impacts associated with fish farming, in the focus group discussions there was much talk of the recent “salmon scare” as well as mention of environmental damage caused by prawn farming in Southeast Asia.



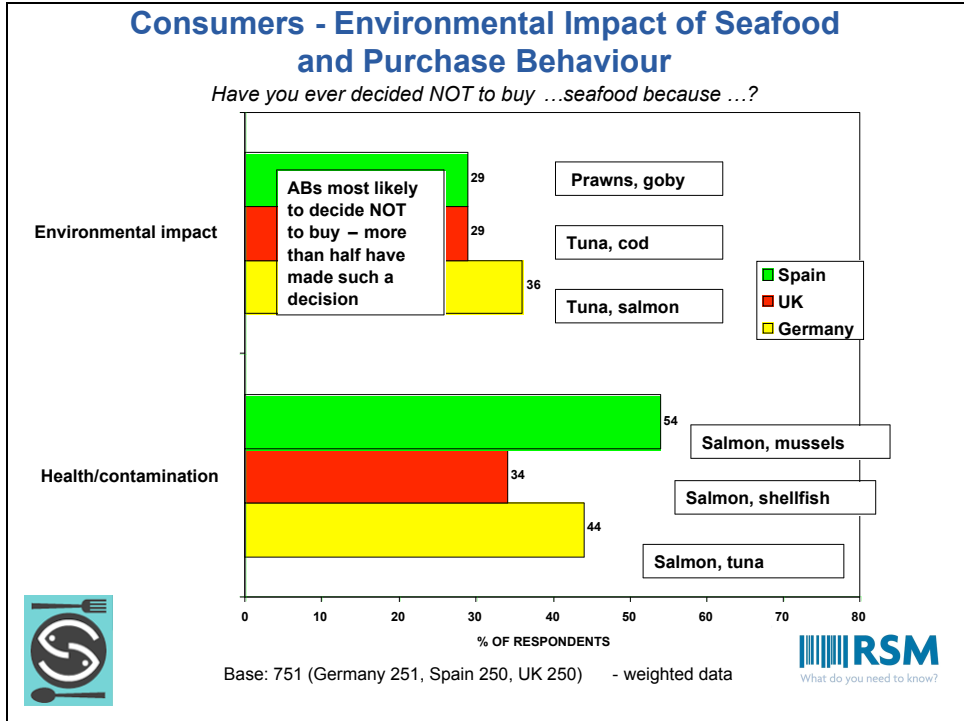
Consumers' seafood purchases are driven largely by quality considerations, but 79% report that environmental considerations are also important, and are more important than price or convenience. In focus group discussions, these concerns were expressed in the purchase of items like dolphin-friendly tuna, avoidance of "hard-discount" stores reasoning that "cheap" fish is "bad" fish and more recently, avoidance of farmed salmon. Also noteworthy is that despite dramatic growth in the organic food category, environmental considerations rank far above the organic designation when it comes to fish.



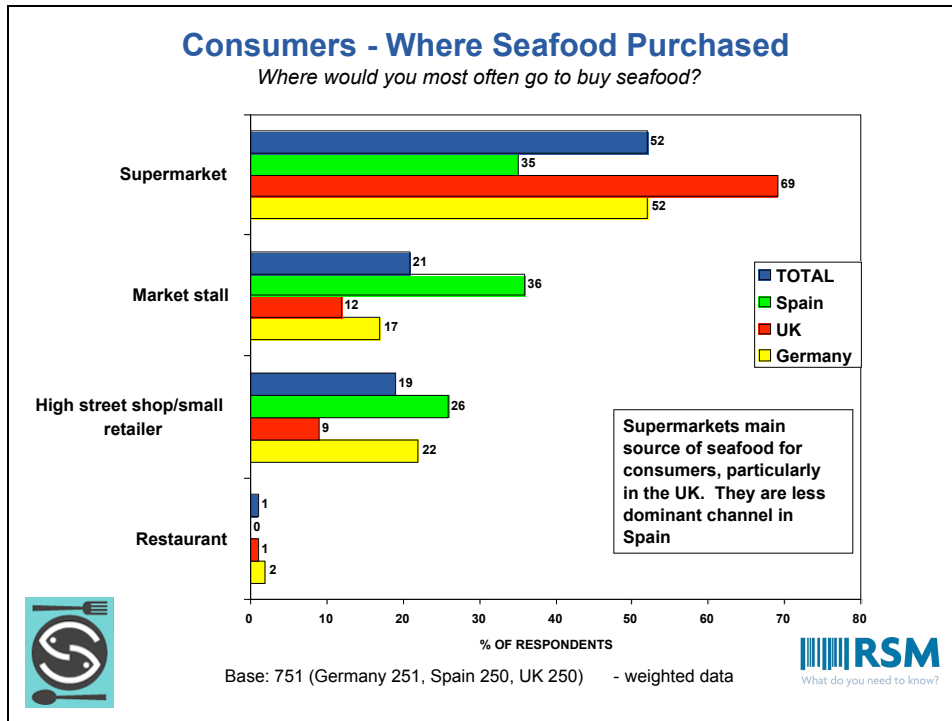
When it comes to more specific environmental considerations with seafood consumption, overfishing (78%) is more of a concern than by-catch (67%), but both issues are considered important by consumers in making seafood purchases.



Nearly one third of consumers (30% on average) have acted on these concerns by not purchasing seafood that harms the ocean, especially in the context of products such as “dolphin safe” tuna. Among the more affluent segment, up to 50% of consumers have avoided buying seafood that they know is not sustainable.



For most consumers, large supermarkets are the prime channels for seafood purchase, especially in the UK with 69% of consumers sourcing there.

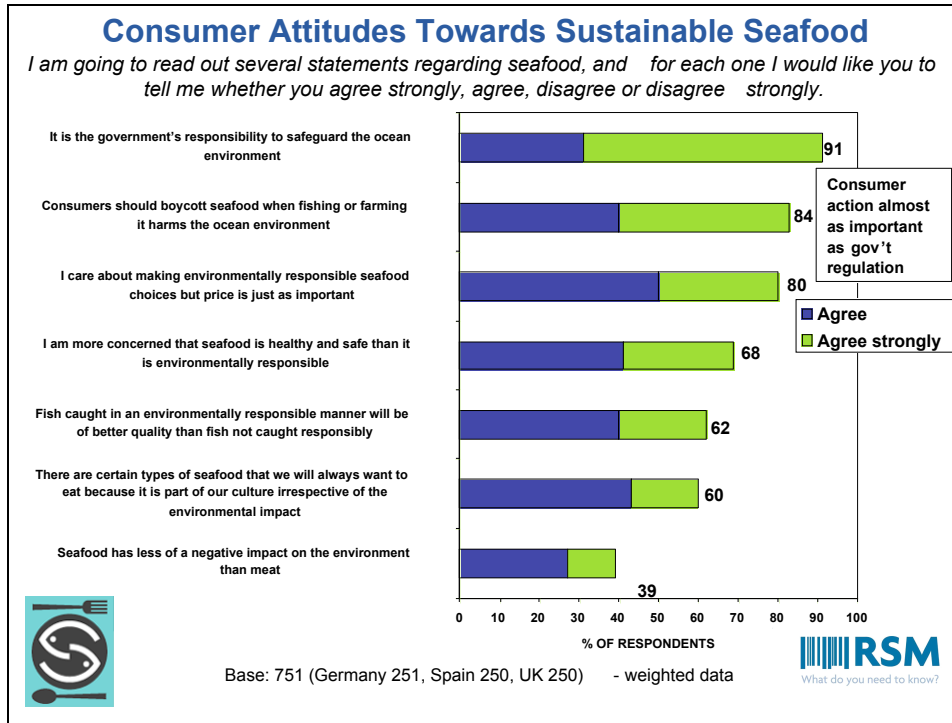


Far from expecting retailers to blindly meet consumer demand, they give broad permission for retailers to source sustainably and educate consumers about better choices.

“Somehow it has got to be the sales outlets that do it, they have to say: ‘We are not going to sell that anymore, because of XYZ.’” [German, 18-34]

“If Sainsbury’s, for argument’s sake, said, ‘All our fish is from replenishable stock,’ if they added that to an advert, people would think, OK (positively about the store).” [UK, 18-34]

Most consumers (91%) also agree that government must play a primary role in managing seafood resources responsibly. That said, focus groups highlighted that consumers recognize the difficulty of managing an international resource and assume that some countries will be “bad actors.” So, despite wanting more from government, 84% agree that consumers must take action by refusing to purchase those types of seafood that are overfished or caught in a way that causes damage to the ocean environment.

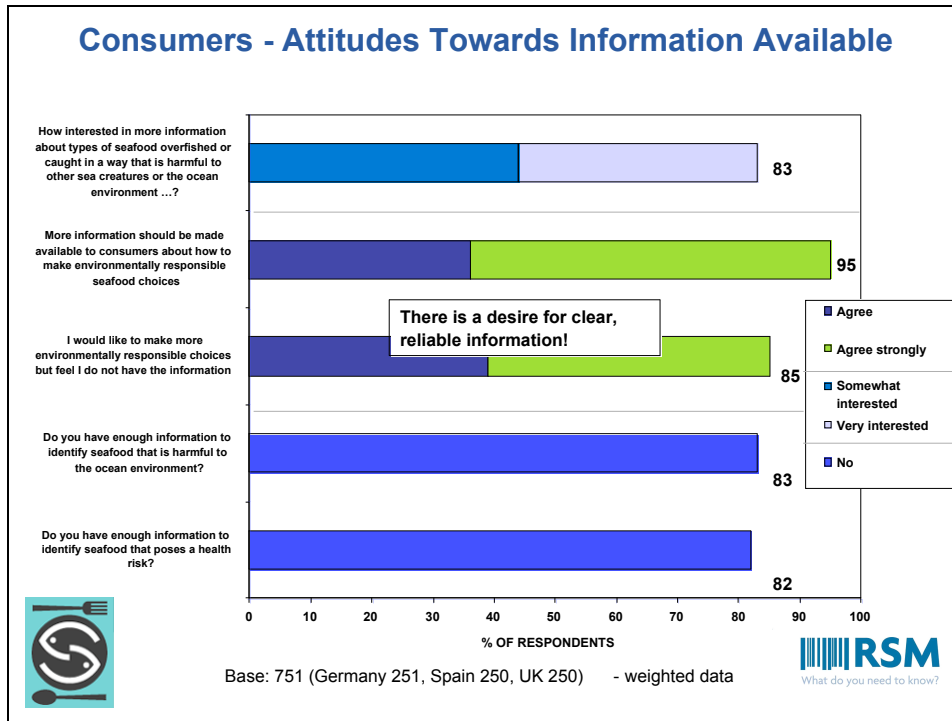


There is a meaningful segment of consumers who say they will support increased prices when purchasing sustainable seafood.

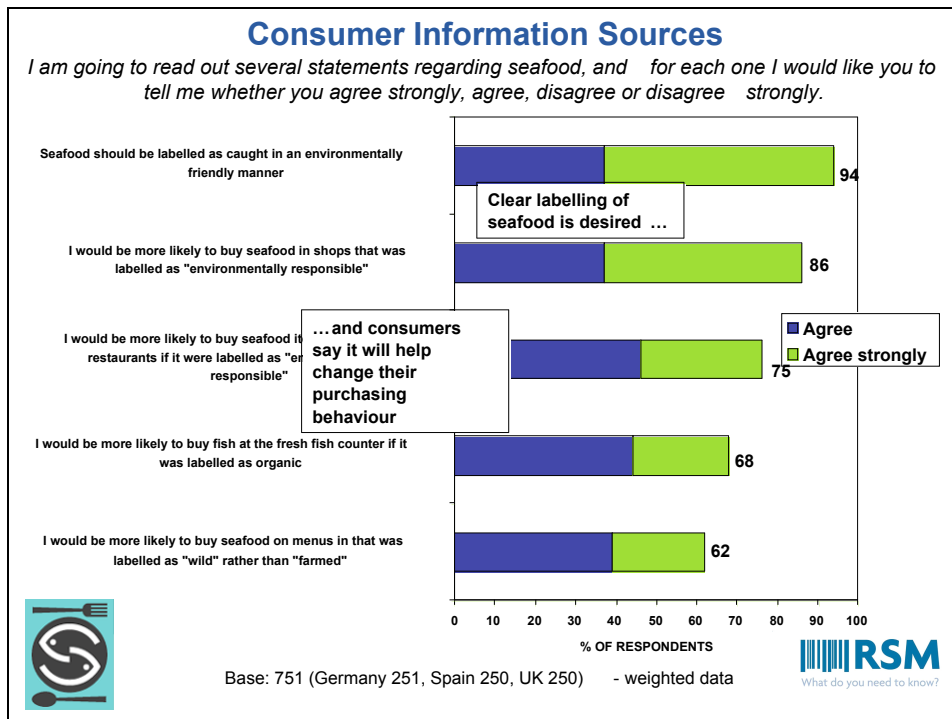
How much is sustainable seafood worth?

- **The average price increase supported is 10%**
- **40% of consumers are willing to pay 5% to 10% more**
- **25% of consumers are willing to pay 10% more**
- **A quarter of the most affluent consumers are willing to pay 20% more**

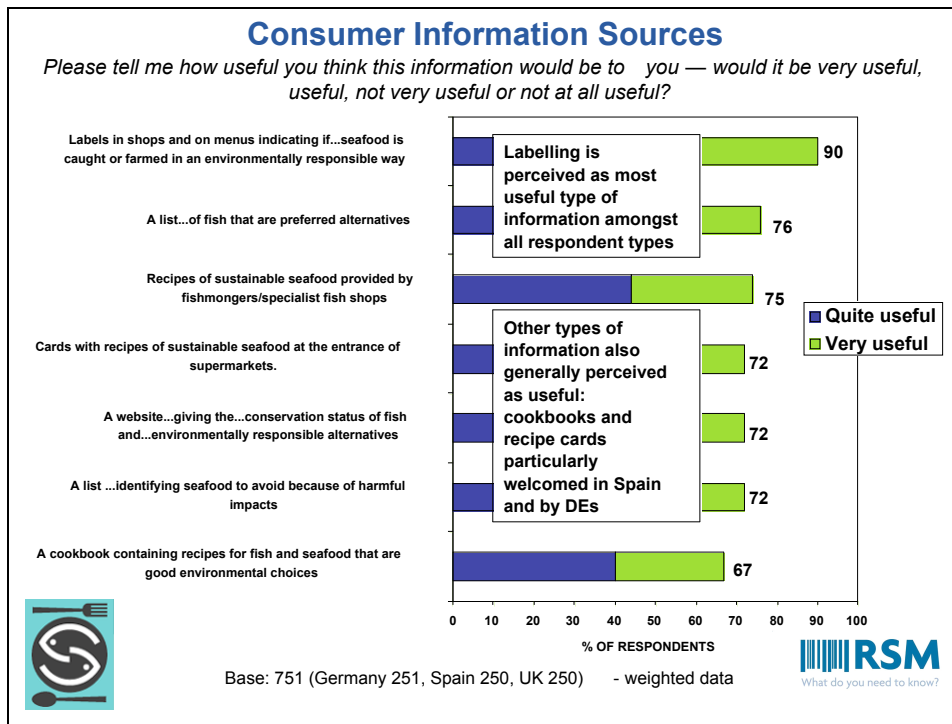
Almost all consumers (95%) want more information about how to make sustainable seafood choices and how to avoid seafood that is harmful to the environment.



In addition, consumers say that having such information will have an impact on the choices they make, with 86% saying they would be more likely to buy seafood labelled as environmentally responsible in stores.



When asked what are the most desirable types of information, consumers say labels at point-of-purchase (90%), which are the easiest to act on, as well as lists of preferred choices (76%).



When asked about the sources of seafood information and lists of preferred alternatives, environmental groups are the most trusted source of information.

- **18% spontaneously mention such groups (Greenpeace, WWF) as reliable and trustworthy sources**
- **When prompted, 82% say they are reliable and trustworthy**
- **And 25% believe them to be the single most trustworthy source of information**

Conclusion

The issue of seafood sustainability is growing in importance for the consumer. They are aware of overfishing, by-catch and some threats associated with fish farming. They want a higher degree of responsibility taken on by retailers to assist them in making environmentally responsible choices. And when given information, consumers are quite willing to alter their consumption in favour of more sustainable choices. They will look also to the guidance of environmental groups to give them information they can act on at the supermarket and would like retailers to supply such information in their stores as well.

Methodology

The above-described research was conducted on behalf of the Seafood Choices Alliance and carried out in two phases by RSM, a market research firm in London with affiliates in Spain and Germany.

The first qualitative phase consisted of six consumer focus groups - two each in Hamburg and London, and one each in Barcelona and Madrid. In each location the focus group composition was:

- One group 18 – 34 year-old consumers (male and female) who consume seafood at least once per month
- One group 35 year-old-plus consumers (male and female) who consume seafood at least once per month

Groups were conducted in the months of February and March 2005 using locally based moderators in the native language.

Phase Two of the research consisted of quantitative surveys conducted by phone using statistically valid sampling. Quotas set by age, sex, region and ESOMAR SEG. To ensure it would be representative of the entire country, quotas were set by North/Central/South for each country, and then a random sample was conducted within each region. Weighting was applied to ensure each sample was nationally representative. A total of 751 twenty-minute telephone interviews were completed as follows:

- Germany 251 1/month+ seafood consumers
- Spain 250 1/month+ seafood consumers
- United Kingdom 250 1/month+ seafood consumers

All interviewing was conducted between 24th March 2005 and 9th April 2005. The margin of error at the 95% confidence level is:

- +/- 3.6% (total sample)
- +/- 6.3% (within country)



The Seafood Choices Alliance has undertaken similar market research among American consumers. The findings from that study are published in *Growing Appetites and Shrinking Seas: The Marketplace for Sustainable Seafood*; Seafood Choices Alliance, June 2003. It can be found at www.seafoodchoices.com.