Sustainable seafood: The Confused Consumer (et al.)

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The importance of sustainability in relation to food production is undisputed.

Research into sustainable seafood is emergent.

Lack of consensus derives from the complex and ambiguous usage of the term ‘sustainability’.

Several gaps in sustainable seafood research.

No clear understanding of how each stakeholder group actually defines sustainability.
Today....

1. Identify how different stakeholders define sustainable seafood
2. Highlight sources of confusion, ambiguity and conflict (and research gaps)
3. Outline different stakeholder perspectives, focusing on consumers
4. Explore strategies to influence behaviours of all stakeholder groups
Research into Sustainable Seafood

- Increasing interest to both practitioners and academics
- Lack of consensus re definition of ‘sustainable seafood’
- Majority of research consumer focussed and assumes consumers have good understanding of sustainability
- Little research re industry perspectives ie
  - Producers
  - Middlemen
  - Retailers/chefs
What does ‘sustainable’ mean?

• Interchangeable and overlapping terms
  – Sustainable/ethical consumption/socially responsible consumption

• Early interpretations of “sustainability” focused on environmental sustainability

• Three pillars of sustainability
  – Environmental/economic/social
Stakeholder roles in seafood sustainability

Consumers

Service provision (Retailers/restaurants)

Distribution (Wholesalers)

Secondary production (Seafood processors)

Primary production (Fishers/Farmers)

Downstream

Industry

Upstream

Macroenvironment

NGO’s/Government

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Macro-environment stakeholder (C)

• Governments
• Non-government organisations
  • Varied funding/focus
Governments

- Only entities with authority to regulate and enforce industry practice
- Focus on the development and implementation of policy and regulation
- Sustainability definition varies depending on department
Government and NGO definitions

...means ensuring human rights and well being without depleting or diminishing the capacity of the earth's ecosystems to support life, or at the expense of others well-being. ...encompasses environmental integrity, social well-being, economic resilience and good governance.

...to use our ecolabel and fishery certification program to contribute to the health of the world's oceans by recognising and rewarding sustainable fishing practices’

The Industry having the necessary practices and policies in place that ensure the future of fish species and the marine environment, while at the same time providing sufficient supply of fish for commercial and recreational fishing needs.
Industry value chain stakeholders (B)

- Primary production (Fishers / Farmers)
- Secondary production (seafood Processors)
- Distribution (Wholesalers)
- Service provision (Retailers / Restaurants)
Producers (fishers/farmers)

- Profit focussed (majority SMEs)
- Competitive pressures and regulatory requirements
- Supermarket chains pressuring to prove sustainable production methods
- Very knowledgeable re sustainable seafood practices
Processors and wholesalers

• Largely ignored in sustainability research
  – Value chain research supports key role of middlemen in control of information/product both up and down chain
• Profit focussed
• Influenced by customer/consumer demands
• General inability to track seafood through supply chain
Retailers

- Consumers abrogate responsibility to retailers – *‘if xxxx is selling it, it must be sustainable’*
- 2011 sustainable seafood initiatives by both major Australian supermarket chains

**Woolworths’** – guided by Sustainable Fishers Partnership (SFP)

**Coles** – works with the MSC and is a signatory to the WWF Global Seafood Charter ...*‘preserving stocks of some traditional favourites which are under threat from overfishing’*
Restaurants

- Emerging issue for many chefs and buyers
- Understanding focused on environmental sustainability
- Chefs rely on suppliers to provide information due to lack of time to research – ‘*if xxx is supplying it, it must be sustainable*’
- Sustainability ranked 13\textsuperscript{th} out of 14 factors in terms of importance in their purchasing decisions (ASCRC)
Consumers (A)

• Locally, organically, environmentally-friendly and sustainably produced all used by consumers

2007 UK consumer survey conducted on knowledge of food sustainability
• 6% suggested they know a lot
• 78% suggested they knew a little
• 16% suggested they didn’t know anything

2003 study of community perceptions of fishing in Australia
• 37% of respondents gave a neutral response, perhaps indicating a lack of understanding
Consumers

• More than 300 environmental groups targeting sustainable seafood
• A multitude of often conflicting seafood accreditation schemes
• Over 200 seafood guides advising consumers on food choices

No wonder consumer are confused…
Consumers... (from previous CRC studies)

- ‘Environmentally friendly’
- ‘Dolphin friendly’
- ‘I wouldn’t have a clue’
- ‘it lasts longer if it’s sustainable’
- ‘I think a lot of people would be scratching their heads about it’
- ‘people want Australian products because they know they are sustainable’
### Previous research limited
- Assumes consumers know what sustainability means
- Does not appear to influence purchase

### March 2015
- Online survey of 1153 Australian seafood consumers

### Are consumers confused about sustainability
- What is sustainability?
- Purchase intentions and behaviour
- Credibility of information sources
What is sustainability?

I in 3 Australians do not know what sustainability means in relation to seafood.

365 respondents (31.7%), either did not know (n = 238) or gave a totally incorrect answer (n = 180).

<table>
<thead>
<tr>
<th>Response theme</th>
<th>No (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Don’t know</td>
<td>127 (9.6)</td>
</tr>
<tr>
<td>No answer</td>
<td>28 (2.1)</td>
</tr>
<tr>
<td>Not sure/unsure</td>
<td>83 (6.3)</td>
</tr>
<tr>
<td>Evaluation (eg good, bad, yes, no)</td>
<td>78 (5.9)</td>
</tr>
<tr>
<td>Freshness related</td>
<td>44 (3.3)</td>
</tr>
<tr>
<td>Healthy/good for you/tasty</td>
<td>54 (4.1)</td>
</tr>
<tr>
<td>Local</td>
<td>4 (0.3)</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>418 (31.7)</td>
</tr>
</tbody>
</table>
What is sustainability?

The remaining 902 respondents all related to *environmental* sustainability.

Dominant theme (n = 517), was maintaining supply, e.g., not over-fishing and preserving breeding stock/levels.

68% of respondents who were able to define sustainability offered a basic definition involving only one or two concepts, while the remaining 32% (n = 287) demonstrated a more complex understanding including multiple concepts.
Level of knowledge

11% no knowledge

15% rated high (7, 8, 9 or 10)

Males tended to rate their knowledge higher than females

Tested against awareness of unsustainable species

- 344 could name one species
- 212 could name two species
- 149 could name three species
- BUT about 100 nominations currently sustainable

Overall knowledge perhaps not as high as consumers think
Purchase intentions and behaviour

The attitude behaviour gap

- Respondents rated the importance of sustainability in the seafood purchase decision highly (mean of 6.78 out of 10)
- When asked to rank the importance of various attributes sustainability ranked 4th behind price, country of origin and species
Purchase intentions and behaviour

- Low intention to knowingly purchase unsustainable seafood
  - Decreased with age, i.e., as age increases, more likely to NOT purchase unsustainable seafood

- 32% actively look for sustainable seafood

- Over 30% would NOT be prepared to pay a premium for sustainable seafood
  - Males more likely to NOT pay a premium

- A further 37% would pay up to 10% premium
## Reasons for NOT purchasing sustainable seafood

<table>
<thead>
<tr>
<th>Reason</th>
<th>n (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not sure which seafood is sustainable</td>
<td>770 (58)</td>
</tr>
<tr>
<td>Lack of information at POS</td>
<td>620 (47)</td>
</tr>
<tr>
<td>Higher price of sustainable product</td>
<td>286 (22)</td>
</tr>
<tr>
<td>Lack of trust of information at POS</td>
<td>285 (21)</td>
</tr>
<tr>
<td>Lack of availability of sustainable product</td>
<td>235 (18)</td>
</tr>
<tr>
<td>Lack of time to evaluate choices</td>
<td>140 (11)</td>
</tr>
<tr>
<td>Other (incl don’t care, don’t know enough, have not thought about it)</td>
<td>32 (2)</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>2368</strong></td>
</tr>
</tbody>
</table>
Credibility of information sources  
(Awareness of Accrediting Bodies)

<table>
<thead>
<tr>
<th>Body</th>
<th>n (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Greenpeace</td>
<td>1211 (91.7)</td>
</tr>
<tr>
<td>World Wildlife Fund</td>
<td>973 (73.7)</td>
</tr>
<tr>
<td>Marine Stewardship Council</td>
<td>96 (7.3)</td>
</tr>
<tr>
<td>Global Aquaculture</td>
<td>81 (6.1)</td>
</tr>
<tr>
<td>None of these</td>
<td>60 (4.5)</td>
</tr>
</tbody>
</table>
Credibility of information sources

High Awareness and High Credibility
- Greenpeace
- WWF

Low Awareness and High Credibility
- MSC
- Global Aquaculture

High Awareness and Lower Credibility
- Australian Government
- Company brand like ‘John West’
- Supermarket like ‘Woolworths’
In summary....

• Many consumers do not have a good understanding of sustainability (even when they report moderate levels of knowledge).

• While consumers tend to rate sustainability as important, when it comes to purchasing, other attributes like price, country of origin and species become more important.
Sustainable Seafood: stakeholder perspectives and approaches

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>Definition of sustainability</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Environmental</td>
</tr>
<tr>
<td>Government</td>
<td>✓</td>
</tr>
<tr>
<td>NGO’s (government funded)</td>
<td>-</td>
</tr>
<tr>
<td>NGO’s (independently funded)</td>
<td>✓</td>
</tr>
<tr>
<td>Producers</td>
<td>-</td>
</tr>
<tr>
<td>Wholesalers/middlemen</td>
<td>-</td>
</tr>
<tr>
<td>Retailers</td>
<td>✓</td>
</tr>
<tr>
<td>Chefs</td>
<td>✓</td>
</tr>
<tr>
<td>Consumers</td>
<td>✓</td>
</tr>
</tbody>
</table>
Concluding remarks....

• Industry under pressure to adopt sustainable seafood practices from government, consumer groups, and vocal NGO’s
• Consumers most researched but least knowledge and understanding

BUT....

• Consumers key as they are sole source of revenue
  – information key role in changing behaviour, but must be relevant and the right quality as too much information lead to overload
  – Labelling and POS

• Many consumers simply don’t want or need the complication, they just want to trust retailers to sell quality, fresh sustainable seafood
Concluding remarks

• Agreement amongst all stakeholders that ‘sustainable’ seafood is key, but...
• Different stakeholder’s understanding of sustainable seafood vary significantly with inconsistencies in focus and strategies
• Gaps around industry stakeholder perceptions of sustainability and consumer research that it is not based on the assumption that consumer have a common understand of the meaning of the term

At present, sustainability appears more a business imperative rather than a consumer concern