

Seafood Sustainability Research

Focus Groups Summary



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Methodology

APCO Insight is supporting ADM Capital Foundation (ADMCF) in its efforts to promote sustainable seafood consumption in Hong Kong with a two-phase research approach:

- 1) **Qualitative Research:** Conducted in the form of three focus groups among Seafood Consumers, to provide understanding of perceptions on the issue and qualitatively assess reactions to key messages.
- 2) **Quantitative Research:** APCO Insight will use the qualitative findings to inform a quantitative survey, developing a questionnaire in partnership with ADM Capital Foundation. The survey will be used to confirm the findings from the qualitative research, providing statistically projectable results regarding perceptions and attitudes towards the consumption of seafood.

The focus groups were based on a common discussion guide complete with the messages to test. The discussions were conversational in nature and allowed participants to provide free-flowing narrative responses so that we were able to capture the language and themes that could be used in the final communication materials.

Respondents were representative of a range of age groups and social backgrounds in Hong Kong and were split into three groups (each composed of 6-8 participants) based on whether their predominant (but not exclusive) channel of seafood consumption was one of the following:

- Wet Market (Group 1)
- Supermarket (Group 2)
- Restaurants (Group 3)

Seafood Consumption Patterns

Seafood consumption patterns were initially explored in all groups in order to understand the broader context of how consumers make decisions about products they consume regularly.

Some of the main drivers of choice expressed by consumers in all the groups were nutritional value, price, origin and difficulty of preparation. The way respondents tend to prioritise these, however, differed significantly in each group (see group-specific section below).

We then explored associations with the term 'eco-conscious consumer'. Respondents across all the groups have a similar understanding of the concept. Some of the most common associations were about minimising waste, recycling (i.e. packaging) and consuming just the right amount of food and only products that you actually need for your diet. Interestingly, in all groups we saw a spontaneous expression that not consuming shark fin is one way to be more eco-conscious. This indicates this is a widely discussed topic and a campaign that proved successful reaching large number of consumers.

“People may be eco-friendly, but there is not enough information about the products we buy in the supermarket. If we could see more clearly from the label the qualities and the origin of the product, we would make better choices.”

Respondent, Supermarket

Respondents also spontaneously raised other topics that suggest high awareness of seafood-related sustainability, these include; the distinction between farmed and wild-caught fish, the strong connection between price and organic products, and specific chemicals involved in the farming process (of both meat and fish).

Group-specific observations:

Wet Market: Freshness and value-for-money are the two main purchasing considerations for respondents in this group. One issue that is more prominent than in other groups is the possibly hazardous impact on health of low quality food, and seafood in particular.

Supermarket: Origin is the most important factor influencing the purchase decisions of this group. They express frustration over the fact that some supermarkets and vendors are not able or willing to provide information on where their products are sourced. When discussing seafood, respondents mentioned spontaneously the difference between farmed and wild seafood, disagreeing however as to which one is better.

Restaurants: For this group origin and freshness are the two most important factors. They spontaneously mention they pay attention to the origin of the products they are consuming, and mention labels as something they rely on when purchasing products themselves. However, they stress this becomes a problem in a restaurant environment, where the consumer has no influence on the choice of raw products used.

“I’m concerned where the food is sourced from when I dine out, but it is not up to us - the restaurant won’t even tell you where they purchase their raw products from, [...] perhaps the supplier isn’t an eco-friendly person.”

Respondent, Restaurant

Unaided impressions of seafood sustainability

In this section, the goal was to explore spontaneous associations with seafood and verify whether the issue of sustainability emerged during the discussion without being formally introduced.

Seafood is recognised by all respondents as an important part of their diet and as a valuable source of nutrition.

There is a genuine confusion around wild and farmed seafood, with respondents holding opposing views on which one is better. Advantages of wild seafood mentioned are its natural flavour, access to rare species, better taste, and higher nutritional values; whilst perceived advantages of farmed include price and security of supply. There was a disagreement between respondents on whether farmed or wild seafood is better for health: on the whole, there was a tendency to see wild caught fish as healthier (mainly due to the absence of hormones), yet some expressed concerns about sea pollution.

Some respondents spontaneously mention the term “seafood sustainability” with the most common associations being overfishing, blast fishing, damage to the marine ecosystem and coral reef destruction. While the term evokes similar top-of-mind associations across all three groups, detailed definitions differ significantly and this suggests a lack of consensus as to how the term is understood.

Regardless of purchasing channel preference, there was a widespread view that seafood is fresher, cheaper and (usually) better quality at the Wet Market. One aspect that is especially appreciated is the expertise of the seller in being able to provide culinary suggestions.

Supermarkets, on the other hand are seen as the ‘safe’ option providing a certain structure of accountability that deters unscrupulous mis-selling of products. At the same time, it was mentioned that labelling of seafood is often unsatisfactory, with often limited information featured. This suggests there is still scope to strengthen supermarket’s position as a trustworthy channel.

Many have heard the issue of how seafood is sourced being discussed on a range of different communication channels: broadcast media, Facebook, documentary movies, etc. This again indicates a strong background awareness of the topic.

Group-specific observations:

Wet Market: This group is especially reliant on the fishmonger at the wet market, as they are the main channel of information regarding seafood origin, quality and even culinary advice.

Supermarket This group is especially aware of the global nature of the problem, and further recognises the very high consumption levels in Hong Kong, and in Asia in general.

Restaurants: The group of restaurant-goers points out that they consume a completely different kind of seafood at home (e.g. pomfret) and in the restaurant (e.g. clams, lobster, and shark fin). Indeed, for many, the whole purpose of eating out is to be able to enjoy seafood that is considered difficult to prepare. Interestingly, this group is the one least aware of the distinction between farmed and wild seafood and has the least-formed views on the properties of both. At the same time, however, many of them say that when eating out they prefer being served wild-caught seafood.

Aided impressions of seafood sustainability

In this section of the discussion, we: 1) exposed respondents to some of the most commonly mentioned facts about seafood consumption in Hong Kong and globally and 2)

“I do not know how to choose seafood, so I will ask the fishmonger at the wet market to choose it for me, by giving them some idea of what my family wants. You have to trust the fishmonger if the price is high that it actually comes from the wild. When you taste it you know if (s) he was honest.”

Respondent, Wet Market

introduced them to the term seafood-sustainability in more detail.

Respondents were given, the following informative text, outlining the pressure on wild seafood stocks, difficulties with aquaculture, and the particular nature of seafood demand in Hong Kong:

Handout

Globally about 90% of commercially important fisheries (that is, places where fish are caught in the wild) are either fully or over-exploited. From 1950 to 2015, the total amount of fish caught per year has grown nearly eight-fold.

Aquaculture is the method used to farm freshwater and saltwater seafood in controlled conditions. If not carried out in proper conditions, aquaculture in inland waters can result in damage to the environment and even have an impact on health.

People in Hong Kong, in particular, have a profound connection to the sea, which means that they are the second highest per capita consumers of seafood in Asia, eating an average of 71 kg of seafood per person, per year. Despite having a very large surrounding maritime area, Hong Kong imports 90% of the seafood products it consumes every year, with the abundant choice of fish hiding the real scarcity of this resource.

Many experts stress that at this rate a future without seafood is on the horizon. Therefore, increasing consumer awareness on choosing sustainable seafood is an important step in guaranteeing the future availability of seafood.

Respondents were asked for their reactions – whether this was new information or not to them, and whether this challenged their previous thinking on seafood consumption.

In order to investigate the idea of channel/spokespersons, there was also a discussion on from whom the information may be most compelling.

Although most respondents were aware of wider discussions regarding seafood consumption and sustainability, some across all three groups expressed surprise or skepticism towards some of the facts presented. Although this sentiment was particularly strong only in some of the groups (see group-specific box below), a few respondents in each group expressed surprise at the fact that people in Hong Kong are the second largest per capita consumer of seafood in the world, with some suggesting that this couldn't be true. Furthermore, some respondents thought of 'sustainable' seafood as farmed, using the logic that it prevents damage to the oceans and guarantees abundance in the market.

Discussion also turned to obstacles to making a more sustainable choice, with respondents indicating the lack of information and labels as the biggest issues. Labels are either completely absent (i.e. in the wet market) or seen as unreliable (i.e. in the supermarket) in providing trustworthy information on the origin of the seafood offered.

Group-specific observations:

Wet Market: Some respondents in this group are sceptical towards some of the figures mentioned; especially the fact that people in Hong Kong are the second highest per capita consumers of seafood in Asia, and the figure of 71 kg of seafood per person, per year. This figure seemed 'too high' and not authentic.

Most respondents in this group say the information they received will have no impact on their choice, because they are still unable to distinguish (at the Wet Market) which seafood is sustainable – and they love seafood too much to stop eating it altogether.

Ambassadors mentioned: Celebrities, Movie Stars, Fong Kin Yee, Chow Yun Fat, Cheng Ekin.

Supermarket: High level of awareness of sustainable seafood and generally more open towards the concept. They recognise that detailed information on sustainability is available, but it is often difficult to access it when you need it (i.e. in the Supermarket). They suggest they do believe the labels, but are conscious there is no way to verify the authenticity of what is stated and this is often frustrating.

Most respondents say they intend to consume more sustainable seafood after reading the brief information text; some stress they are already choosing as wisely as possible and are avoiding endangered species.

Ambassadors mentioned: Celebrities (although with a degree of scepticism expressed by some respondents), government-sponsored campaigns, WWF and other NGOs.

Restaurant: While generally recognising seafood consumption patterns are problematic, this group is sceptical towards some of the numbers quoted in the informative text and believes they are “overblown” and “exaggerated”.

Few respondents mentioned that after becoming more familiar with the problem, they will avoid consuming unsustainable seafood in the future and will be careful when choosing which restaurants to visit. Most, however, declare this information will have no impact on their choice.

Ambassadors mentioned: Government-sponsored campaigns, marine scientists.

of how convincing or not they are. The combined results for all three groups are shown in the table on the following page, in order of most to least convincing.

Message Assessment

In this section, respondents were asked to review a range of statements in favour of sustainable seafood consumption used by ADMCF in existing materials, and rate them in terms

Messages – In order of most convincing to least convincing (Total Result)	Very + Somewhat Convincing	Not Too + Not at all Convincing
2. With fish stocks declining and demand rising, a future without fish is on the horizon.	20	1
12. To help consumers make the right seafood choice, consistent labels/logos need to be available.	20	1
8. Farming seafood is not a good solution, because poor farming practices can cause pollution of surrounding waters and the use products that may contain chemicals and antibiotics.	18	3
11. Consuming sustainably farmed seafood is part of protecting the environment.	18	3
13. Hong Kong restaurants are an important channel for promoting sustainable seafood. They need to commit to serving sustainable seafood to their customers.	17	4
3. Throughout Asia, fisheries are largely unmanaged. Chances are that you are eating fish that may be illegal, not regulated and at risk of disappearing from our oceans.	16	5
4. Wildlife can get entangled in fishing nets and lines as a result of poorly managed fisheries, leading to the death of millions of animals each year.	16	5
14. Supermarkets in Hong Kong should always have to ensure sustainable seafood is available.	16	5
7. Eating a fish without knowing how or where it was caught or raised is a health risk.	15	6
9. Farming seafood is not a good solution, because many farmed fish such as grouper and salmon are fed with other wild caught fish.	13	8
15. Hong Kong can earn international respect and attention if it can bring an end to the trade of unsustainably sourced seafood.	13	8
5. The fish we eat are getting smaller. That's because many of the fish consumed are juveniles, which have had no time to reproduce.	12	9
1. People should not purchase unsustainably sourced seafood under any circumstances.	9	12
6. If business carries on as usual, it is predicted that the price of some of Hong Kong's favourite seafood could increase to as much as 8 times what it is today.	9	12
16. Consuming unsustainable seafood should belong to the past, it is not something modern and progressive Hong Kong citizens would do.	9	8
10. Farming is not a good solution, because it produces seafood that may be unhealthy and harmful to eat.	7	14

Most convincing messages

Declining stocks and a possible future without seafood (n.2) was one of the two most persuasive messages, demonstrating a high level of agreement with the fact that resources need to be available for future generations. Respondents seem to be particularly responsive to the emotional phrasing “future without fish”, which should be considered for carrying through into any future campaign.

Another message that performs equally well is the need to support consumers with reliable labeling (n.12). This resonates with the overall theme of the groups as respondents from all groups complained about the lack of information available on this topic.

The further messages that are well received are n.11 – suggesting that consuming sustainably sourced seafood is part of protecting the environment in general – and n.8, indicating that farmed seafood is not a good solution due to the pollution it causes to surrounding waters, and the use of chemicals and antibiotics. Given the earlier spontaneous mentions of chemicals/antibiotics as problematic in aquaculture, we suspect that it was this aspect of the messaging which respondents reacted to in particular.

Other messages that perform well are 3, 4, 7, 13 and 14. Along with those mentioned above, these messages will be tested in the quantitative stage of the research in order to provide detailed metrics on which are the most impactful.

“I’m convinced by number 2. As the fish stocks decline and our demand continues to increase, the assumption that fish will disappear in future from the earth is becoming a reality.”

Respondent, Restaurant

Least Convincing Messages

The statement that farmed seafood is not a good solution, because it can produce unhealthy and harmful seafood (n.10) is unconvincing for many respondents. The reason they give for this lies in the fact that the statement is too general and (according to some) it can be wrong in the case of conscious producers. The contrast with message 8 (chemicals/antibiotics in farmed seafood) is highly telling here – the more detailed explanation of why aquaculture is less healthy is far more impactful.

The general statement that people should not purchase unsustainable seafood under any circumstances (n.1) is also perceived negatively, again because it is seen as too general and also inflexible.

Interestingly, another message that does not perform well with consumers is the one suggesting that if business carries on as usual, it is predicted that the price of some of Hong Kong’s favourite seafood could increase to eight times as much as today’s price (n.6). The explanation for this is a degree of skepticism towards the calculations behind this claim. This comes despite the fact that price was earlier discussed as a key factor in purchasing decisions, and serves as a note of caution against ‘overclaim’ in proof-points (even if in this case, the figures are correct).

Assessment of current campaigns

Respondents were presented with a brief description and visual materials of two existing campaigns promoting seafood sustainability in Hong Kong - the WWF Seafood Guide and Ocean Park's Blue Matters campaign – and were asked to discuss what stands out positively or negatively in each. The first campaign presented, the WWF Seafood Guide, is an initiative specifically tailored to the Hong Kong market that reviews over 70 popular seafood species and divides them into three categories on the basis of their sustainability. The second, Ocean Park's Blue Matters, is a campaign launched by Hong Kong's biggest amusement park on marine conservation aiming to inform and promote advocacy for overall marine environmental protection.

WWF – Seafood Guide

This initiative is very positively perceived, with many respondents pointing that objective information is what the consumer actually needs in order to make a more sustainable choice. The level of detail featured in the seafood guide is very much appreciated and provokes immediate reactions to some of the information featured in it (e.g. several respondents are surprised that some of the fish they consume regularly are featured as a 'red' and say they may choose differently from now on). The simple traffic light system was seen as easy to understand, another factor in adding the consumer in the discussion on making sustainable choices.

However, a very limited number of respondents were familiar with the campaign and some point out that this is surprising, considering that it was launched in 2014. They recognise, therefore, that there is a need for a larger-scale promotion of

such a campaign in order for it to be effective. Some point out that many people in Hong Kong, especially the elderly, associate sustainable seafood exclusively with shark fin soup and a wider information campaign is needed to clarify the term and give guidelines on the entire range of seafood available in the country.

Furthermore, some of the respondents who have heard or read about WWF's initiative point out that they never saw it applied in public, guessing that this is because there is a very limited number of fine dining restaurants which comply with it.

Some mention ideas of how to use the WWF Seafood Guide such as in co-operation with food suppliers, involving restaurants and retailers, a "green label" competition for schools and public services, etc.

Ocean Park – Blue Matters

Overall, this campaign received rather negative feedback. One reason mentioned was the lack of trust towards the author of the campaign, with some respondents pointing out that – in their view – Ocean Park is a place that "abuses" animals. Although they feel the message promoted is positive, they would find it more persuasive if it were coming from a different source.

Furthermore, there is a perception that the campaign lacks concrete recommendations on steps consumers can take to genuinely engage with marine conservation – a notable plus of the WWF guide.

Overall, respondents are skeptical of the campaign, as they perceive it more as a form of communications material aimed at improving Ocean Park's image rather than genuine commitment to environmental protection.

Conclusions and Next Steps

The three focus groups conducted provided us with considerable depth on beliefs and opinions when it comes to seafood consumption, and allow us to explore current perceptions of seafood sustainability to uncover the most common associations with the term. There are some major themes that emerged from this first phase of the research that will be important to investigate further in the second phase:

- 1) General **baseline awareness** of the idea of sustainable seafood, but a **lack of clarity** as to what it means. This indicates that an educational component will need to form part of any campaign – the extent of the problem, what it means to make a sustainable choice, etc.
- 2) **The importance of information.** It was notable that several respondents expressed frustration with the lack of clear information on seafood origin, noting that even when it is available it is often unreliable or not from a source they can fully trust. As a consequence, even consumers willing to purchase sustainably sourced seafood are unable to do so on a regular basis due to these practical obstacles. This confirms there is a demand for more informative campaigns facilitating the task of the consumer in all three main channels explored (wet market, supermarket, and restaurant). Establishing a trusted channel/source is going to be vital as part of this.
- 3) There is a **very high degree of reliance on the seller.** This manifests in different ways in wet markets, supermarkets and restaurants. In the wet market scenario, the consumer is dependent on trustworthy relationships with specific sellers. Given the difficulties of labelling in this channel, change is only likely to be affected by the consumer being educated, in order for them to ask the right questions of the seller, thereby conveying to the seller that there is demand for (and profit in) sustainable seafood. The supermarket offers the availability of a labelling solution to facilitate choice. Again, the supermarket will have to be convinced that there is demand for this. However – we saw signs that supermarket purchases are fairly familiar with the idea of sustainable seafood. In the quantitative phase, we will explore whether those purchasing in this way are more sustainability-motivated than others. Restaurants provide a different dynamic again, although part of the problem will again be convincing owners that providing more information on sourcing makes commercial sense.
- 4) The **distinction of farmed versus wild-caught fish needs clarifying**, as consumers can be uncertain as to how the two relate to sustainable seafood. Most of the discussion around the benefits and drawbacks of either option revolved around health and taste, rather than sustainability. Ultimately, however, it may be that messaging around health may be the most motivating driver of a shift to ocean-caught seafood. We will work together with ADMCF on exploring definitions of all these terms in the quantitative

phase that are both accurate and resonate with consumers.

- 5) The **WWF Seafood Guide is very well perceived** by respondents in all groups – this suggests a similar approach for future initiatives would work well. The traffic light system is simple and easily understood. One weakness seems to be, however, the fact that it's simply not well-known enough. Extensive public promotion of the material and engagement with retailers and restaurants is likely to be vital.
- 6) A number of **messages used currently by ADMCF perform well with consumers** – emotional phrasing and more detailed information seem to work well, rather than generalisations. The quantitative phase will help us with consolidating our understanding of the most and least impactful messaging to employ in future campaigns.