



Sustainable Tables:

European Seafood Professionals and Environmentally Responsible Seafood

The Seafood Choices Alliance recently completed the first-ever market research study of European seafood retailers and chefs/restaurateurs on sustainable seafood and the ocean environment. The Alliance, a nonprofit trade association, seeks 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. Founded in the United States in 2001, the Alliance expanded to Europe this year.

As the foundation of its new European programs, the Alliance's study of seafood professionals complements a simultaneous study of European consumers and parallels work previously conducted in the United States. The research was undertaken in partnership with the Alliance's European NGO partners: the Marine Conservation Society (UK), The North Sea Foundation (The Netherlands), Greenpeace, and WWF.

It is clear that while consumers wield substantial power in the marketplace, when it comes to food, retail purveyors and chefs have a great deal of influence. By sourcing and selling a variety of seafood, retailers can help consumers to bring the restaurant experience home. By acting as "tastemakers," chefs present consumers with seafood options and preparations they may never have tried before. This research explores how retailers and chefs view their roles in bringing environmentally friendly seafood choices to the table.

Research Objectives

There were four main objectives for the research effort among professionals in Europe:

- How do European seafood purveyors consider the ocean environment and what is their level of concern for it?
- How much and what is understood about the cause and effect of problems specific to fisheries and aquaculture? To what extent do professionals see these problems impacting their business?



- What role do professionals see for themselves vis-à-vis supporting sustainable seafood? How, if at all, do they want to engage with their customers on this issue?
- What do professionals need in order to make more environmentally responsible seafood choices available to their customers?

To answer these questions, the Alliance worked with the UK-based marketing research firm RSM to coordinate a qualitative and quantitative research effort in the United Kingdom, Germany and Spain. (For information on the methodology, please see the end of this report.)

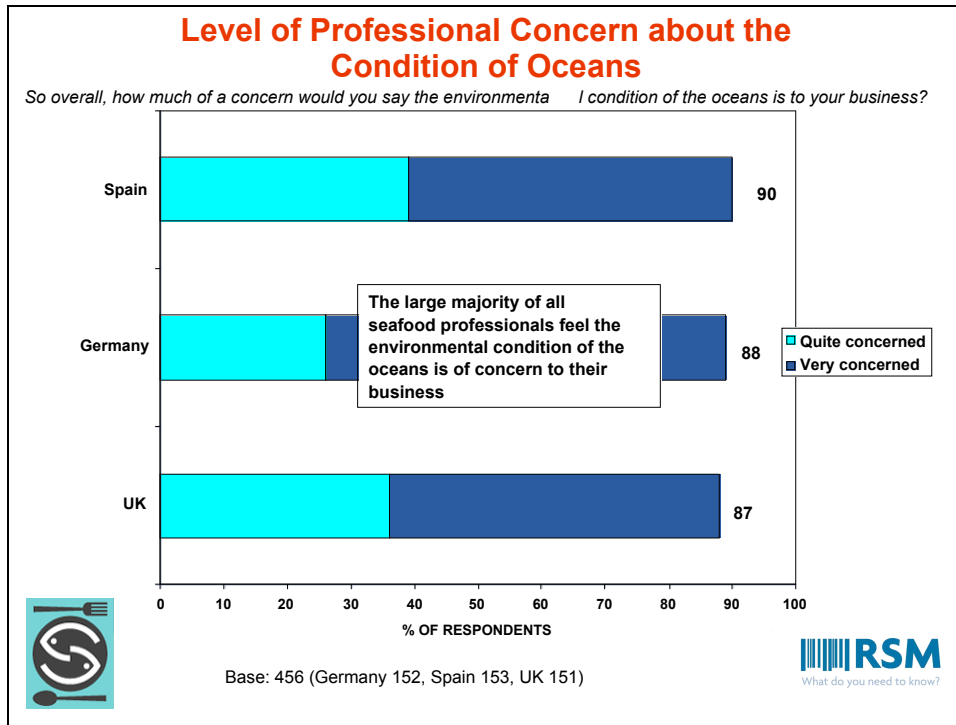
Key Findings

The Alliance's findings indicate that there is a growing interest among seafood professionals to source sustainable fish and shellfish, because they understand that a lasting supply is economically crucial, but they need more choices and more credible and actionable information.

- Effects of overfishing, bycatch and bad farming practices are broadly known, and most express worry about continued threats to the ocean.
- Professionals recognize that sourcing sustainable seafood is essential to the future of their businesses.
- Most accept at least some responsibility for promoting sustainable seafood and understand their power to influence consumers.
- There is a real deficit of credible, authoritative information available to these seafood professionals.
- Environmental NGOs are seen as providers of trustworthy and reliable information.
- A number of retailers and chefs have taken various fish and seafood off their fish counters and menus because of environmental considerations, and they are willing to take further actions.

Highlights

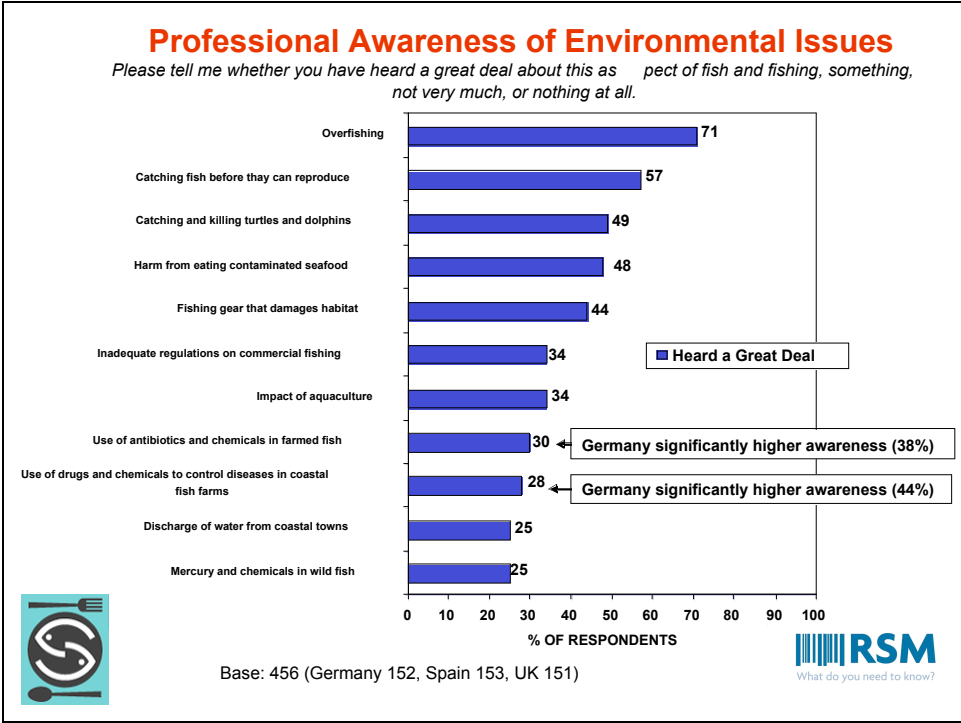
Seafood professionals report that the environmental condition of the ocean is of concern to their businesses, with an average of 88% of those polled in the three countries saying they were quite or very concerned.



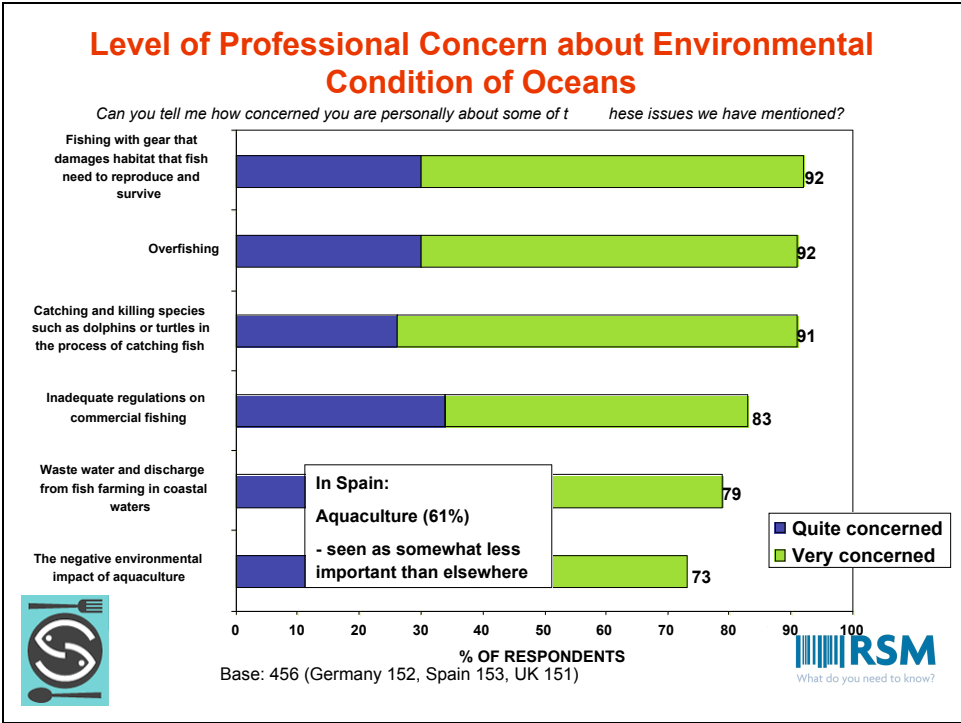
The key drivers of concern about the environmental condition of the oceans are business related. When asked why they are concerned, the top reasons given are:

- Seafood/sea produce is my business (56%)
- Environmental issues will affect my business (41%)
- We need to maintain fish stocks for the future (24%)
- Environmental issues may cause stock prices to rise (15%)
- Unhealthy fish will affect our business (14%)

When asked about the top sustainability issues associated with fish and fishing, professionals are most aware of the problem of overfishing, followed by certain by-catch and fishing gear-impact issues. In general, purveyors are more aware of these problems than consumers, with just over 7-in-10 saying they have heard a great deal about overfishing. Many professionals are familiar with the problems of turtle and dolphin by-catch as well as seafood contamination and human health issues.



Three issues are of great concern to nearly all the professionals interviewed: damaging ocean habitat with fishing gear, overfishing and by-catch. All of these issues generate extreme concern among upwards of 90% of respondents. Concern about damaging aquaculture practices is present, but not as intense, most likely because awareness of environmental impacts of aquaculture is much lower.



Professionals Share Their Concerns About The Ocean And Seafood

“Five years ago I didn’t even know you could eat parrotfish. They’ve over fished everything else so now they’ve got to have the really exotic fish instead.” [Germany]

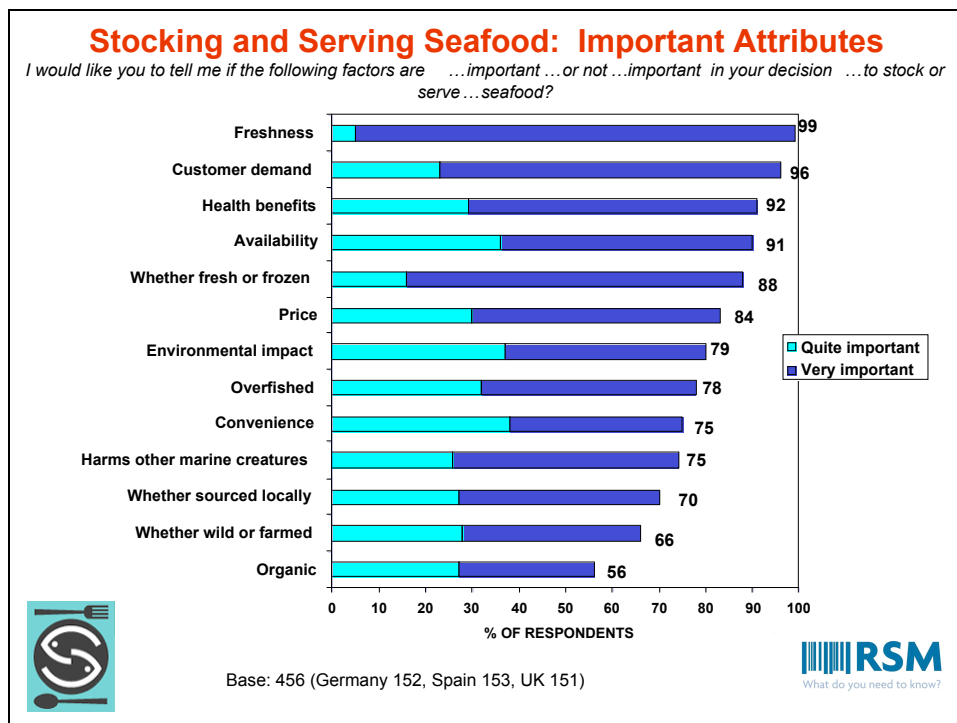
“Also environmental pollution that comes from the fish farms. Look at all those scampi farms in Thailand and Asia.” [Germany]

“We are destroying it all, within 10 to 15 years, it will all be farmed fish.” [Spain]

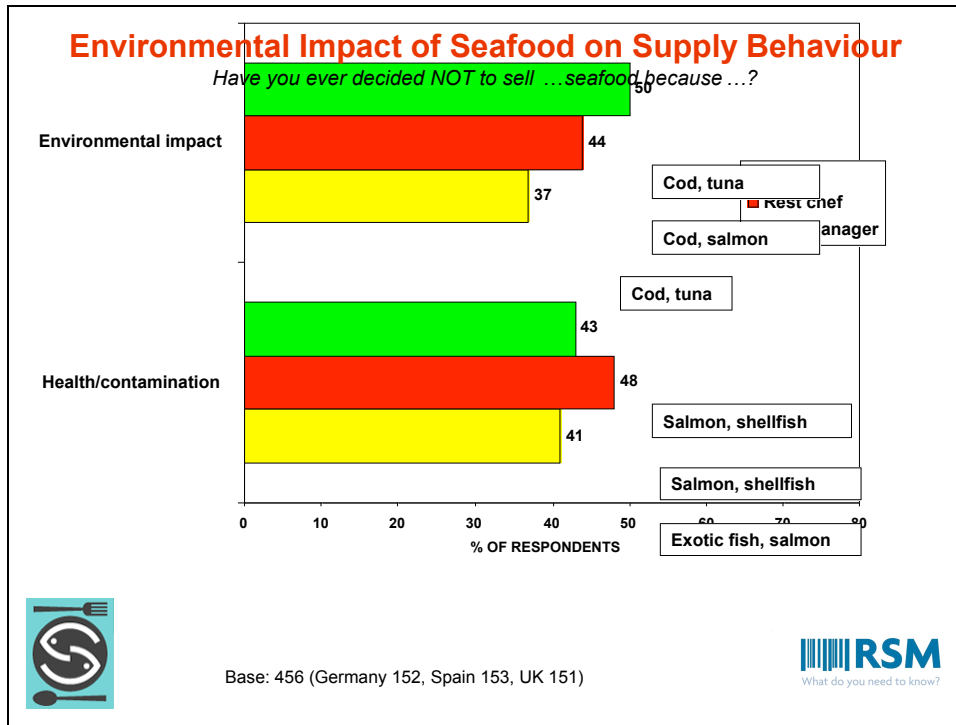
“I think we would sell more [fish] if we could have more choice. We restrict our choice so heavily, for example, no tuna, no prawns. We would sell more if we felt we could buy them sustainably.” [UK]

“It seems that with such aggressive methods of fishing we will end up losing the marine fauna...” [Spain]

While it is not surprising that issues surrounding seafood quality are the top factors in purchasing decisions, the environmental impact of sourcing a particular seafood is also a priority consideration, with 79% of retailers and chefs/restauranteurs saying it is quite or very important. Quality issues, demand, availability and price are the dominant factors influencing retail and restaurant decisions regarding what seafood to sell. However, environmental considerations rank just slightly behind price and are far ahead of local sourcing and organic designations. This may indicate that the dramatic growth in organics and concern for local farm economies is in part driven by concerns about sustainability of the food supply.



While nearly half (44%) of seafood professionals have responded to health scares and concerns about seafood contamination, it is noteworthy that the same number have also stopped offering a particular seafood because of concerns about environmental impacts. In fact, among retailers, more action has been motivated by environmental considerations than by health concerns. Professionals who have stopped selling a type of seafood for environmental reasons most frequently cite cod, salmon and tuna.

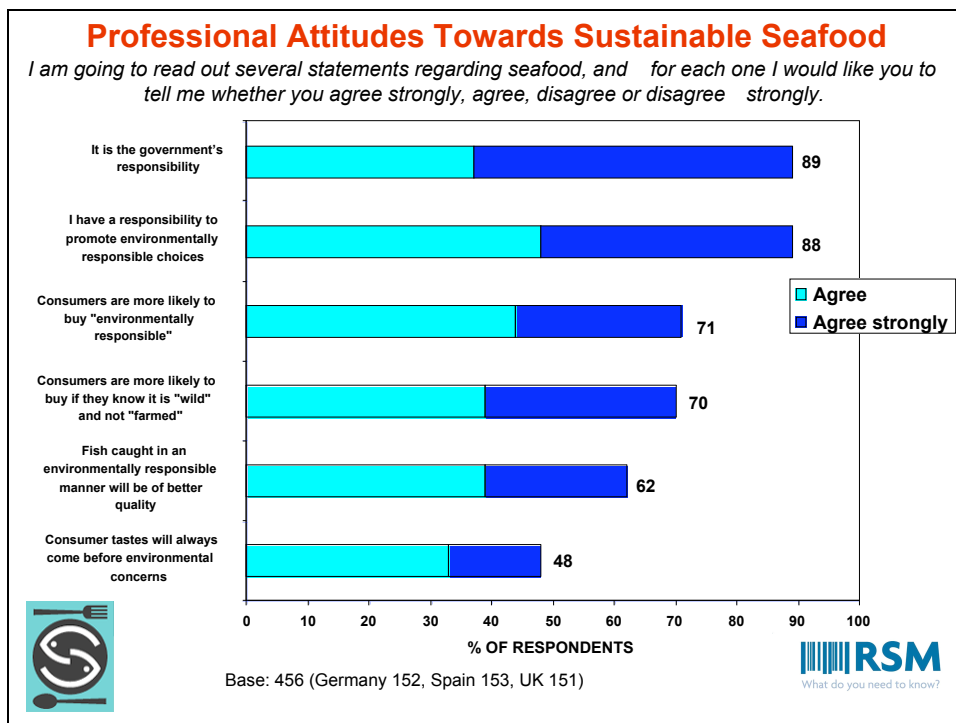


While they feel strongly that the government must bear responsibility for ensuring sustainable fisheries and aquaculture, retailers and chefs/restaurateurs also believe they have an important role to play in encouraging consumers to make environmentally responsible seafood purchases. In focus groups, most had examples of unusual menu items that were successful with customers simply because the preparation or presentation was attractive (e.g., carp, tilapia).

A majority (71%) of professionals believe that consumers are more likely to buy “environmentally responsible” seafood, showing the power that consumer demand for sustainable products could yield and the opportunity that professionals have to promote seafood that is good for the ocean and good for business.

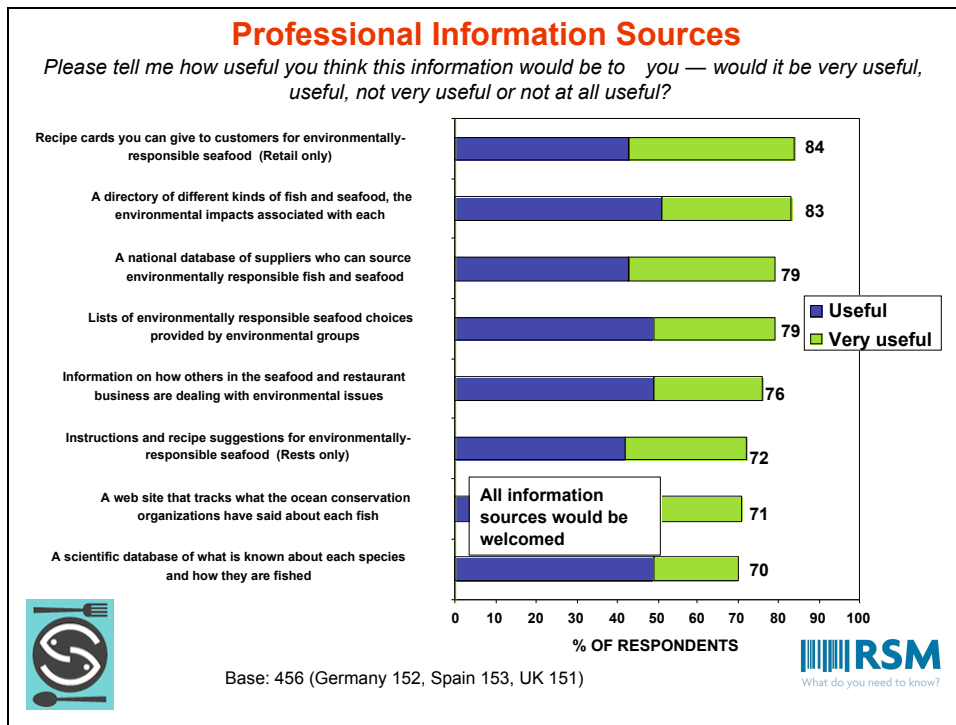
It is also informative to note that the majority (62%) of seafood professionals equate environmentally responsible fishing with a higher quality product. In focus groups, chefs frequently agreed that fish caught by hook and line was of better quality than those caught in drift nets. One chef from Spain commented, “There are a thousand ways to fish and there are different qualities between them. What we demand more is hooked fish because it suffers the least... because with these nets, the fish caught first become damaged...and that is a fish that no one wants.”

Finally, seafood professionals do not universally place the demands of customers before sustainability. Less than half agree that consumer tastes will always come before environmental considerations, indicating that these professionals are serious about affecting change in the marketplace to ensure a lasting supply of seafood.



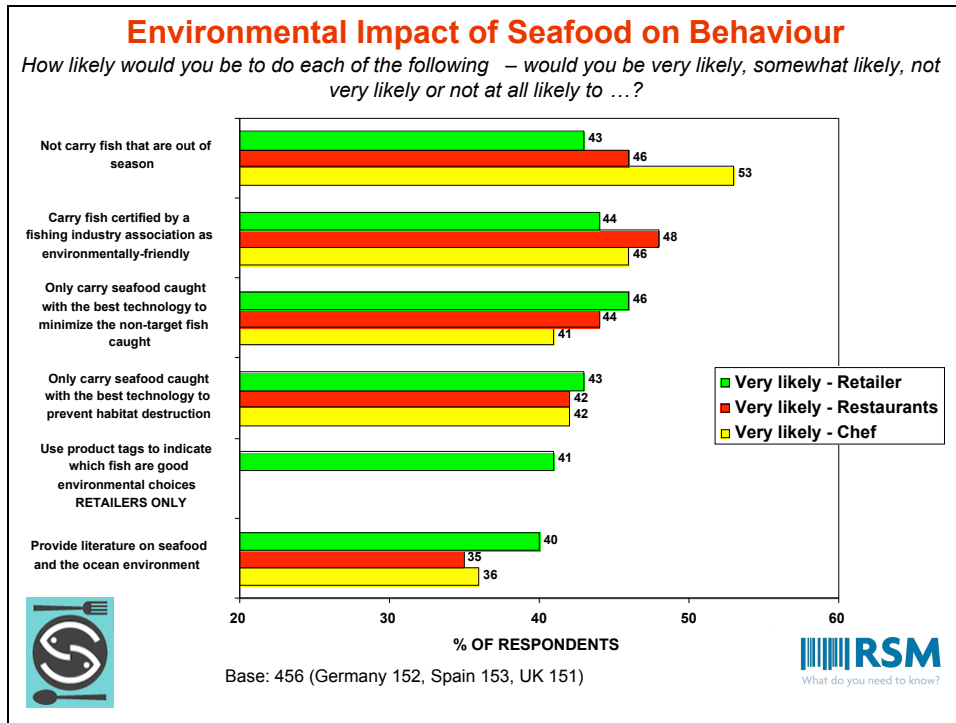
When asked what would improve their ability to sell seafood that was produced in an environmentally responsible manner, the large majority of professionals said “more information.” Half say they are very interested in getting more information on this topic and 85% express at least some interest.

Chefs and retailers alike say the most useful types of information would include directories of fish and seafood and the environmental considerations associated with each; access to a database of suppliers who can source sustainable seafood; and lists of responsible choices.



79% of professionals surveyed said an alliance of environmental groups would be a reliable and trustworthy source of information, and they would welcome guidance from environmental groups on which seafood choices are most sustainable.

Substantial numbers of retailers, chefs and restaurateurs are willing to take action to address environmental concerns about seafood. Chefs are the most versatile and willing to take action, but there is interest from all sectors. Professionals are most interested in carrying seasonal fish, offering environmentally certified product and offering fish that are caught using the best, least damaging technologies.



Conclusion

There is a great deal of awareness and concern about unsustainable practices associated with fish and seafood among professionals in the retail and restaurant sectors. Many have already made decisions against certain seafood products because of environmental concerns. While all retailers and chefs/restaurateurs care about meeting their customers' demands, they believe it is important for them to play a role in promoting sustainable seafood and recognize that it can be good for business too. They feel strongly that right now there is a lack of credible information on environmentally responsible seafood. They are particularly willing to listen to what environmental groups have to say on this issue, and many are poised to take more action.

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.

Phase One: The first qualitative phase consisted of six focus groups and 12 in-depth interviews.

- Two focus groups each were held in Hamburg and London, with one held in Madrid and one in Barcelona. In each location the groups were composed of chefs and restaurateurs whose menus were comprised of at least 20% seafood.
- Twelve in-depth interviews were conducted among seafood retailers across Germany, the UK and Spain. Retailers that sold only frozen seafood were excluded (retailers had to carry “wet” fish).

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

Phase Two: Following the focus groups, quantitative surveys were conducted by phone using statistically valid sampling. A total of 456 twenty-minute telephone interviews split between chefs, restaurateurs and retailers were completed as follows:

- Germany 151
- Spain 152
- United Kingdom 153

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

- +/- 4.7% (total sample)
- +/- 8.2% (within country)



The Seafood Choices Alliance has undertaken similar market research among American seafood professionals. 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.