

**Exploring Representations of Consumers and Interactions amongst
Governance Actors in the Sustainable Seafood Movement**

by

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ABSTRACT

EXPLORING REPRESENTATIONS OF CONSUMERS AND INTERACTIONS AMONGST GOVERNANCE ACTORS IN THE SUSTAINABLE SEAFOOD MOVEMENT

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This thesis explores the evolution and internal tensions of the ‘sustainable seafood movement’ in North America. Many large retailers and ENGOs advocate the purchase of certified seafood as an alternative to state-led management of wild-capture fisheries. Thus, market-based seafood governance is premised on the assumption that consumer demand for certified seafood products exists and/or will grow over time. However, as the sustainable seafood movement has evolved, economic research suggests that consumers have not responded with their wallets as quickly as anticipated. This research explores how seafood retailers and ENGOs interact and how they understand and publicly communicate the role(s) of the consumer in this movement. Findings show that there has been relatively little consistency in how the role of the consumer has been communicated. This work raises important challenges with the sustainable seafood movement and helps to animate analytical frameworks used to assess market-based governance systems.

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LIST OF ACRONYMS

ASC	Aquaculture Stewardship Council
ASMI	Alaska Seafood Marketing Institute
B.A.P.	Best Aquaculture Practices
CSR	Corporate Social Responsibility
ENGO	Environmental Non-Governmental Organization
FAO	Food and Agricultural Organization
FIP'S	Fisheries Improvement Projects
FMI	Food Marketing Institute
FSC	Forest Stewardship Council
MSC	Marine Stewardship Council
WWF	World Wildlife Fund

CHAPTER ONE: INTRODUCTION

1.1 CONTEXT

Fish have long been a source of protein for human consumption. However, the last 150 years have seen an increase in the fishing industry's efficiency, depth, and range (Pitcher & Cheung, 2013). Reports about the state of the world's oceans and fisheries, as discussed by popular media, Environmental Non-Governmental Organizations (ENGOS), governments, and academics have centered around "a current or looming 'crisis'" (Hebert, 2010 pg.554). The latest Food and Agricultural Organization (FAO) report suggests that 58% of wild fish stocks are fully exploited and 30% are overexploited (FAO, 2012). This is occurring at a time of increased pressure on resources, a growing global population, and a growing global middle class whose changing diets are placing further strain on protein sources (FAO, 2012; Pitcher & Cheung, 2013; Young & Muir, 2002). The seafood industry is globalized and increasingly integrated; this suggests that international trade and the pursuit of expanded consumer markets will only continue to intensify and likely place more pressure upon fish stocks and marine ecosystems in the future (Oosterveer & Spaargaren, 2011).

Over the last 10-20 years, stock decline/collapse (e.g. Newfoundland cod) in state-managed fisheries has drawn intense attention from environmental non-governmental organizations, the media, and to a lesser degree, the general public (Silver and Hawkins, in review). Criticisms usually connect stock decline directly to the challenges with state oversight of a common pool resource (i.e., the tragedy of the commons) and/or insufficient fisheries science (Hardin, 1968; Ponte, 2012; Young & Muir, 2002). Market-based mechanisms use the

market as a means to create change within a production chain through things such as certifications, ranking guides, and consumer awareness campaigns. These mechanisms are being advocated as a possible solution or alternative to state oversight. These alternatives and assumptions about consumer willingness to pay for certified or endorsed fish underlie what supportive environmental ENGOs, participating retail firms, and other advocates of market-based seafood governance coined approximately fifteen years ago as ‘the sustainable seafood movement’ (Silver and Hawkins, in review).

Specifically, the premise of the sustainable seafood movement, is that consumer willingness to pay more for fish that has been certified or endorsed sustainable (i.e. ‘sustainable seafood’) will incentivise improved behaviours within fisheries (Gray & Hatchard, 2007; Gulbrandsen, 2006). However, although the sustainable seafood movement has gained in general public popularity (Silver & Hawkins, in review), academic literature suggests that a broad-based consumer willingness to pay a price premium for certified sustainable seafood has not emerged in North America (Eden, 2011; Roheim, 2008; Gulbrandsen 2006; Kemmerly & Macfarlane, 2009). Seafood consumers instead seem to place greater priority on other product attributes, such as health, cost, and freshness in their purchasing decisions (Leire & Thidell, 2005). Nonetheless, attention to and efforts around sustainability endorsements and certifications continues to mount within the seafood industry.

As in Europe and the United States, all major Canadian grocery retailers publically released sustainable seafood commitments between the years 2009-2011. These included standards of purchasing for their suppliers, all done through partnerships with various ENGOs (Schmidt, 2012). Many of these retailer commitments stipulate or favour a certain standard for sustainability, such as Marine Stewardship Council (MSC) certified sustainable seafood. In store,

seafood is displayed alongside sustainability credentials in seafood counters, providing consumers with both information on the species being sold and the commitments being made toward sustainable seafood by the retailer. In addition, since the 1990s, there has been rapid development of alternative forms of sustainable seafood labelling/endorsement and certification by ENGOs, and increasingly, state governments and seafood companies (Bush et al., 2013; Foley & Hebert, 2013).

1.2 RESEARCH QUESTION AND OBJECTIVES

The research question for this thesis is twofold; how do large food retailers and environmental non-governmental organizations understand and publically communicate the role of seafood consumers in market-based sustainable seafood governance, and has this changed over time? Three main objectives have been developed to provide research direction and structure. The objectives are as follows:

Objective 1: Identify how consumers have been framed within publically available media artefacts and reports produced by retailers and ENGOs since the early 1990s to 2013, and discuss whether or how this has changed over time;

Objective 2: Attend the 2013 International Boston Seafood Show and assess how large retailers and ENGOs are characterising and discussing the sustainable seafood movement and highlight tensions amongst governance actors; and,

Objective 3: Informed by findings from objective 1 and 2, describe and comment on the current status of the sustainable seafood movement and identify key future prospects and challenges.

As the findings chapters will present, with the exception of one major certification body--the Marine Stewardship Council (MSC) -- the ways in which consumer demand is being communicated has not changed at any specific point in time and is quite contradictory in publically available documents. This means that although studies suggest limited consumer demand and willingness to pay for sustainable seafood, the consumer is generally still being presented as demanding seafood that has been certified or assured by a third party as sustainable. Three points will be presented based upon this overarching finding: **1.** In the data, the consumer is presented as both active or as passive. **2.** The sustainable seafood movement has grown away from a basis in the power of consumer demand and instead has the potential to become a tool by powerful retailers through their market influence to promote seafood consumption and promote an image of that industry which is both sustainable and responsible. **3.** This widespread adoption of the sustainable seafood movement by ENGOs and retailers has allowed for the formation of numerous sustainable seafood standards and alternatives. These alternatives include new certifications, private labels and Fisheries Improvement Projects. These findings call into question the current effectiveness of the sustainable seafood movement because actors cannot agree on its driving mechanisms or purpose, and because retailers retain more power relative to ENGOs in that they can choose these less effective alternatives or endorsements as they see fit.

1.3 LITERATURE AND STUDY RATIONALE

Environmental governance is a group of mechanisms, organizations and regulatory processes which are utilized by political actors to influence actions made on behalf of the environment (Lemos & Agrawal. 2006). This includes actions made by the state, businesses,

communities and ENGOs. A lot of work completed on governance explores various ways to use new forums, such as the international marketplace as a means to create collaboration amongst different stakeholders to address international environmental crises (Bridge & Perreault, 2009). Market-based mechanisms in the sustainable seafood movement are positioned to work by utilizing the power of consumer demand. Consumers demand sustainably sourced (often certified) seafood products over other non-certified seafood products and this sends a signal through the marketplace that consumers are willing to pay for the added costs of verified sustainable seafood products (Eden, 2011; Gulbrandsen, 2006; Roheim 2009; Young & Muir, 2002). This signal then places fisheries in a position of greater financial gain if their management strategies are altered to ensure sustainable harvesting of seafood species, thus utilizing the market to improve the sustainability of the fishing industry. However, the reality is that this is not the case and consumers have not demonstrated a willingness to pay a price premium for sustainable seafood in North America (Gulbrandsen, 2006; Johnston & Roheim, 2006). Rather it has been pressure from ENGOs that has led to large Canadian retailers developing sustainable seafood partnerships and presenting their campaigns to consumers (Schmidt, 2013).

Many articles dissect the roles of various stakeholders in an attempt to understand how each actor is contributing to market-based solutions. Retailers are able to utilize their market influence to create standards which their suppliers must adhere to (Busch & Bain, 20004; Styles et al., 2012). ENGOs are able to place pressure upon businesses including retailers and producers through the use of public shaming to convince businesses that their involvement is not only good for their brand image but also for the long term extraction of ocean resources (Dunn, 2005; Greenpeace, 2008; Gulbrandsen, 2006). The role of the consumer has also been explored, with various bodies of work attempting to understand why consumers have not demonstrated a

willingness to pay a price premium for sustainably certified seafood in North America. Reasoning varies from cost, lack of interest, consumer confusion, lack of knowledge in preparation of seafood at home, and an unwillingness to change diet preferences of favourite species to alternative ones (Iles, 2004; Kemmerly & Macfarlane, 2009; Roheim, 2009; Wessells et al. 1999). As an ongoing and progressing movement, sustainable seafood and market-based governance is still evolving with increasing market interest throughout the world. Therefore, understanding the relationships amongst different actors is important towards providing insight into the potential future direction this movement may take and its effectiveness in addressing the issues it set out to tackle.

As previously mentioned, as the sustainable seafood movement has continued to grow since the 1990s, it has become apparent in academic literature that there has been limited demonstrated willingness of consumers to pay a price premium for certified sustainable seafood. However, the seafood movement has been adopted by retailers and ENGOs. Exploring how the consumer has been communicated by these governance actors through time was achieved to see if, as this has movement progressed, did the communication of the consumer role change as well. Understanding how ENGOs and retailers publically communicate the role of the consumer can shed light upon whether these actors have acknowledged the realities of this lack of demand currently. This can further highlight the motivations behind why these different organizations have become involved in the sustainable seafood movement without the demonstrated demand for it. Ultimately, exploring the consumer role provides a unique vantage point in understanding these governance actors as the sustainable seafood movement continues to evolve.

1.4 ANALYTICAL FRAMEWORK

The formation and continuing development of the North American sustainable seafood movement has been conceptualized by Schmidt, 2012, through the use of an analytical framework created by Bernstein and Cashore (2007) to establish political legitimacy for Non-State Market Driven (NSMD) governance systems. They argue that market-based mechanisms can be an extremely effective way to address global environmental problems because of their ability to get around state compliance and utilize the market directly to create change, essentially establishing global solutions to global problems. However, they also point out that because of the number of non-state market driven governance systems currently available, varying in scope and effectiveness, there is no established rule of what should be adhered to as a global compliance standard (Bernstein & Cashore, 2007). A diagram of the framework is included below (Figure 1.1).

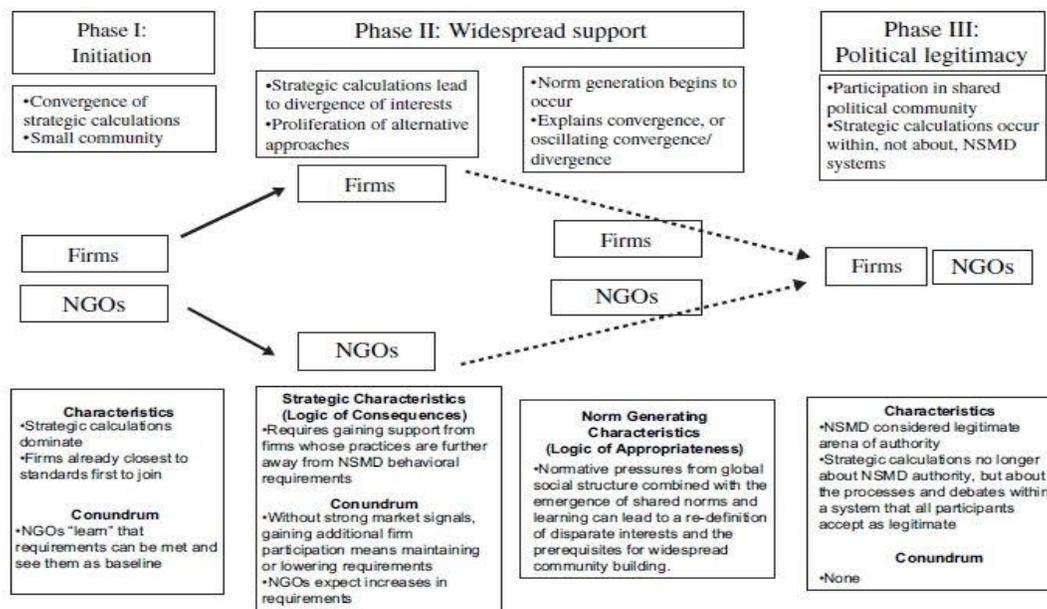


Figure 1.1 — Bernstein & Cashores (2007) framework for achieving political legitimacy for non-state market driven governance systems (NSMD).

In order for market based governance to achieve an agreed-upon standard, those standards have to be perceived as legitimate by the actors involved. Political Legitimacy is seen to exist when “firms, social actors and stakeholders are united into a community that accepts shared rule as appropriate and justified” (Bernstein & Cashore, 2007 p.348). In order to do this the movement must go through three stages of development. By establishing political legitimacy, in Phase Three, market based governance will have also achieved a global agreed upon standard for compliance to ensure the goals of the movement have been achieved for all actors involved. This framework will be used when discussing the current state of the sustainable seafood movement in North America.

1.5 THESIS OUTLINE

This thesis follows with five additional chapters. Chapter 2, Literature Review, provide further scholarly context for the research conducted as well as expose a gap in current research. Chapter 3, Methodologies, outlines the methods used to conduct this research. Chapter 4 and 5 present the findings for this research. Chapter 4 presents a reflection of the data collected in Objective One, exploring how the consumer is being portrayed in the sustainable seafood movement by ENGOs and retailers, and whether this has changed over time. Chapter 5 presents the data collected at the 2013 International Boston Seafood Show for Objective Two, and will present an event ethnography exposing the current industry tensions surrounding the sustainable seafood movement and questions of consumer demand (or lack thereof) for sustainable seafood.

Chapter 6, Discussion and Conclusion, reflects Objective Three, followed by the conclusion, which provides recommendations for further research into the area of sustainable seafood and environmental governance.

CHAPTER TWO: LITERATURE REVIEW

2.1 INTRODUCTION

In response to declining fish stocks and environmental non-governmental organization (ENGO) dissatisfaction with state led-management, seafood guides, certification schemes, and fisheries improvement projects have been increasingly advocated as alternative governance arrangements by ENGOs and adopted by processors and retailers over the last twenty years (Gray & Hatchard, 2007). These governance tools are premised on the idea that environmentally conscious consumers will prioritize sustainability as a key factor in their purchasing decisions, and perhaps, be willing to pay a price premium for seafood that has been certified or assured by a third-party as sustainable (Gulbrandsen, 2009). However, research suggests that although retailer commitments to source sustainable seafood have proliferated dramatically, in North America consumers are not responding with their wallets (Roheim, 2008; Gulbrandsen 2006; Kemmerly & Macfarlane, 2009). Instead, confusion regarding innumerable rankings and certifications prevail (Eden, 2011). Very rarely have consumer's ranked sustainability as a top decision-making factor resulting in an unwillingness to pay price premiums for certified products (Gulbrandsen, 2009; Roheim, 2008). It is, therefore, an opportune time for fisheries managers, ENGOs, retailers and academic scholars to critically assess the emergence, structure, and outcomes of market-based seafood governance to date (Ponte, 2012, Roheim, 2008, Gulbrandsen 2006, Gulbrandsen 2009, Kemmerly & Macfarlane, 2009).

The environmental governance landscape in the sustainable seafood movement is young, developing, and complex. It is made up of multiple actors working in collaboration towards achieving the goal of improved fisheries management through the use of market-based

mechanisms such as certifications and consumer facing product labels. This chapter will introduce and explain the roles and limitations of these different actors as discussed in the current literature. First environmental governance will be discussed, followed by the roles of three governance actors: the Retailer, the ENGO, and the Consumer. Following this, criticisms of the sustainable seafood movement as well as tensions occurring between governance actors will be explored. Lastly, relevant gaps in the current academic literature will be identified.

2.2 ENVIRONMENTAL GOVERNANCE

Lemos and Agrawal (2006) describe environmental governance as interactions created by the state in addition to other non-state actors, such as communities, businesses, and ENGOs. They argue that these types of partnerships arise because states are unable or unwilling to aid in the creation of better more sustainable management practices and outcomes. These partnerships are often due to the political-economic pressures of globalized business and trade, or in the case of seafood, pressures on marine resources. To address the challenges of state-led environmental management, numerous ENGOs have become market players themselves by encouraging, and in many cases, joining forces with retailers to develop and promote the adoption of third-party certification schemes, sustainability focussed marketing and consumer education, as well as corporate social responsibility commitments (Dunn, 2005; Eden & Bear, 2010; Gulbrandsen, 2006; Iles, 2004).

Market-based environmental governance arrangements have become more prominent alongside the rise of environmental governance (Bernstein & Cashore, 2007; Lemos & Agrawal, 2006). Examples include: privatized resource quota, markets for permits and ecosystem service

payments and the pursuit of economic incentives for sustainable commodity production and consumption (Bridge & Perreault, 2009). With regards to production and consumption, individuals are enrolled in environmental governance through purchasing guides and sustainability logos meant to influence purchasing decisions, and in turn, incentivize more sustainable behaviour by firms (Roheim, 2009). In theory, creating a market for certification will ensure that the informed consumer is able to purchase sustainably produced products at their retailer of choice. In practice, however, and as will be explained research suggests that it is far more complicated.

2.3 THE ROLE OF THE RETAILER

Corporate Social Responsibility (CSR) is considered to be a “voluntary business contribution to sustainable development and is based on the integration of social and environmental concerns into business operations” (Berth & Wolff, 2009 p3). Often promoted through the use of publically available CSR reports and press releases, such as those used for this research, these documents include goals and commitments that reflect the identity of the corporate brand and encourage consumer loyalty through shared values. Although traditionally demands for solutions to environmental and social issues have been directed toward the state, globalization and increased transparency of the supply chain has led to the targeting of companies by ENGOs and the public (Berth & Wolff, 2009; Spaargaren, 2011). Retailers utilize their CSR in the sustainable seafood movement to demonstrate their sustainable seafood commitments and to counter the claims made by ENGOs that their company practices are harming the environment (Gulbrandsen, 2006). For example, Greenpeace produce annual

Retailer Report Cards whose main objective is to publically pin retailers against one another based upon their sustainable seafood commitments (Greenpeace, 2008). In addition, the annual production of these report cards grants retailers the opportunity to improve their standards and ranking against other retailers. Rather than being part of the problem, retailers are able to position themselves as part of the solution and both provide that solution to their consumers, and appease pressure from ENGOs.

Traditionally the role of the processor has had control over retailers. This occurred because powerful processors were able to set the terms of contracts for many products which were directed at the consumer such as popular big name products (Busch & Bain, 2004). However cheaper and more globalized production and increasing retail conglomeration have changed the power dynamics between processors and retailers. Busch & Bain (2004) suggest that the supermarket industry has become an oligopoly, meaning the industry is run by a few powerful players which influence all standards, creating a cut-throat competitive market requiring a dedicated consumer base to survive. This change in power dynamics allows retailers the opportunity to make demands on their suppliers—including the procurement of sustainable seafood certifications—to ensure that their corporate social responsibility (CSR) commitments are met and they are able to provide the necessary labelling information of their sustainable seafood products.

Moreover, although they may not always be willing to pay extra, middle-class consumers do demonstrate greater health and environmental concern (Ailawadi & Keller, 2004; Busch & Bain, 2004). Thus, retailers are not only (or always) competing over having the lowest prices in their stores, but over having the best brand image via offering variety, convenience, quality, and year-round supply of desired products to keep a loyal consumer base (Busch & Bain, 2004). The

utilization of certification on seafood products fits well into brand image production because this type of non-price competition can help a retailer stand out from their competitors as well appease pressure from ENGOs (Gulbrandsen, 2006). But because of the competitive nature of the retailing world, retailers are also able to mimic each other very quickly, as is demonstrated by the shift of all Canadian retailers to sustainably focussed seafood purchasing standards between 2009 and 2011 (Schmidt, 2012). To stand out each retailers commitments are different and relies upon collaboration with different ENGOs to promote their sustainable seafood commitments in a way that is unique from their competitors.

The ability of a retailer to move towards more environmentally sustainable choices is limited by their ability to attain private certified label products, or have their own house brand products certified. As a result retailers often depend upon the capacity of exterior governing bodies such as ENGOs like the MSC (Jaffry, et al., 2004). Limited capacity of ENGOs to provide market solutions, such as readily available certification, places pressure upon retailers and seafood suppliers ability to attain recognition for their commitments. An example can be drawn from the seafood processor Unilever, and their commitment to have all fish sold under their numerous brand titles certified by the MSC as of 2005. Unilever was forced to abandon their pledge because of the limited supply of products available carrying MSC certification at that time (Gulbrandsen, 2006). This can create tension between ENGOs, seafood suppliers, and retailers because gaining certification can increase market access and would place those unable to achieve certification at a disadvantage, such as suppliers pressured to achieve certification by retailers or face the loss of a contract (Gulbrandsen, 2006; Gulbrandsen, 2009). This then opens up the market for the formation of alternatives, which can affect the level of influence the

sustainable seafood movement can have by potentially diluting sustainability standards (Foley & Hebert, 2013).

2.4 THE ROLE OF THE ENGO

There are many questions surrounding the effectiveness of ENGOs in governance partnerships. This is because they have less power than the state and the power that they do have is subject to their ability of persuasion and moral authority to gain support through donations and social action (Eden & Bear, 2010). However, ENGOs are able to orchestrate political consumerism by utilizing their power both inside and outside of the market (Gulbrandsen, 2006). They influence the market from the outside by mobilizing their numerous supporters to orchestrate boycotts as well as buycotts for or against certain products. Through public shaming, ENGOs have aided in persuading company policies to adapt to more sustainable and environmentally friendly methods (Gibbs, 2007; Gulbrandsen, 2006; Schmidt, 2012). ENGOs have also been able to affect the market internally by becoming market players, partnering up with companies and major retailers to change purchasing policies towards better environmental standards. Several examples of these forms of action will be described in the findings chapters.

However, ENGOs perceptions of consumers, and the way they present knowledge to consumers has been argued to be flawed in several ways. ENGOs were engaging certain types of consumers, mainly upper-middle class, rather than educating people of all social standings (Iles, 2004). This can greatly limit the overall effect of the sustainable seafood movement, because it places limitations upon who can participate. This shortcoming speaks to academic literature that

criticises sustainable/ethical consumption as inaccessible because of the added product cost for certified products (Carrier, 2010; Dauvergne, 2010; Manietes, 2001; Ponte, 2012).

NGOs are also presenting scientific information en mass, often without traceability or context. This is done to simplify the information for consumers in a more digestible and quick access form. Examples include consumer pockets guides and labels created to influence shopping decisions (Jaffry, 2004; Kemmerly & Macfarlane, 2009; Roheim, 2008). However, these guides do not explain how the information is gathered or whether there is consensus in the scientific community (Iles, 2004; Roheim, 2008). One example of such discrepancies is the criticism the MSC has received for approving the certification of several fisheries, which include 19 formal objections put forward by conservation groups (Christian et al, 2013). Analysis of these formal objections concluded that MSCs principles are “too lenient and discretionary, and allow for overly generous interpretation by third-party certifiers and adjudicators” (Christian et al., 2013 p.10). The average consumer however, is only provided with a certification symbol that implies the product they are purchasing is sustainable. Therefore, the criticisms behind such symbols remain invisible to consumers unless they undertake additional research of their own. As a result, consumers could unknowingly be contributing to the problem that their purchase is proposing to solve (Christian et al, 2013; Froese & Proelss, 2012).

NGOs often target the individual by appealing to a sense of moral responsibility of citizen-consumers, such as by framing uninformed purchasers as destroyers of the oceans (Iles, 2004). Providing information to consumers is supposed to address the knowledge gap they experience, because of their separation from the globalized supply chain and the effects of the products they purchase (Eden, 2011). However, Spaargaren (2011) argues that environmental awareness does not imply performed environmental behaviour. An example of Spaargaren’s

argument is the outcome of the SeafoodWatch consumer guide, which was produced by the Monterey Bay Aquarium (MBA) to educate consumers about sustainable seafood (Kemmerly & Macfarlane, 2009; Roheim, 2009). Walking through the MBA, individuals were provided with information on sustainable seafood and the current state of the oceans. Upon leaving, aquarium goers were provided with a SeafoodWatch wallet card to use when shopping for seafood in the future. After the distribution of one million wallet cards, a follow-up survey was undertaken that targeted aquarium goers who self-identified as being concerned for the environment. The survey discovered that respondents, although now educated about the effects of overfishing and by-catch, were still consciously purchasing fish located on the red (avoid) list (Kemmerly & Macfarlane, 2009). Consumers were given free condensed and digestible information, but did not demonstrate an interest in changing their purchasing decisions.

Similar results can be drawn from a study conducted by Johnston & Roheim in 2006, (Roheim, 2008) where household respondents in Connecticut demonstrated a limited willingness to change their purchasing habits because that would mean they were no longer able to eat their favourite types of seafood (Roheim, 2008; Spaargaren, 2011; Wessells et. al., 1999). The overall consensus in the current literature is that consumers are not willing to change their purchasing habits to encourage more sustainable seafood standards. Therefore change has to occur at another point in the supply chain, which has been demonstrated by ENGOs placing pressure upon retailers as well as forming partnerships with retailers which result in the promotion and education of sustainable seafood in stores (Eden, 2011; Gulbrandsen, 2009; Kemmerly & Macfarlane, 2009; Roheim, 2008; Schmidt, 2012).

2.5 THE ROLE OF THE CONSUMER

Carrier (2010) argues that ethical consumption can achieve both personal and public benefits to individuals. Personal in that consumers feel that through this form of consumption, they will be leading more morally just lives, and public because consumers feel that their purchasing power will positively affect the world around them. Building upon ethical consumption, individual collective action is a concept that considers individual acts of consumption as collectively affecting change within the market, and perhaps, environmental and/or social conditions (Clarke et al., 2007; Iles, 2004). Following this logic individual consumption is argued to be a form of political action. Armed with information (transgressing the knowledge gap) consumers can choose to boycott or buycott specific products as a means to create and encourage change through acts of conscious/ethical consumption (Carrier, 2010; Clarke et al., 2007; Copeland, 2013).

The rise of consumers as political actors is seen as an effect of shifting governance relationships between the state, the market, and citizens (Clarke et al., 2007). These changing relationships allow for new spaces of dialogue between all governance actors (Lemos & Agrawal, 2006). Conscious consumption does not only focus on the consumers but upon the other market actors, creating a “politics of shame” (Clarke, p. 238, 2007) whereby one group of actors, ENGOs, are able to engage and shame another group of actors, retailers. They do this by using the conscious consumer to shed light upon the retailer’s poor business practices. As previously discussed, in theory this shame should result in retailers engaging in some form of CSR that would change the way that retailers choose to supply the targeted products in their stores.

According to Styles et al. (2012) the role of the consumer is considered to be “utterly insufficient” (p. 75) as a driver for environmental change. This is because consumer choice is restrictive, reflective of various social norms, and also defined by cultural and personal tastes (Eden, 2011; Griskevicius et al., 2010; Roheim, 2008). It is also important to note that there has been no major grassroots campaign among consumers for the creation of more sustainable seafood standards in North America (Roheim, 2008). It has instead been the ENGOs which have supported small pockets of consumer demand and have been pushing for and creating a change by establishing themselves as market players and partnering up with major retailers from North America to the UK (Gulbrandsen 2006; Roheim, 2008). Therefore this greening of consumerism “can be said to be organized more or less behind the back of the ordinary citizen consumer” (Spaargaren, p. 814, 2011). The consumer’s role is limited and dependent upon what choice is being offered to them, moving the responsibility away from consumer demand and placing it upon the retailer’s ability to alter their purchasing policies as well as educate their consumers by providing the appropriate labelling information (Styles et al., 2012).

Eden (2011) argues that seafood labelling is not just a stamp on a product representing sustainability, but also represents political, ecological, and economic complexities. Because of the consumer position within the production chain, the products they purchase are detached of their effects and “legacy of pollution and exploitation” (Eden, 2011, p. 171). Knowledge is thus considered key to certification. However, consumers do not respond to product information in a simple manner. There are numerous influences which determine why individuals purchase things (Eden, 2011; Griskevicius, et al., 2010). Often times, products can be purchased on impulse and has nothing to do with what we know about the product itself (Eden, 2011). In addition, consumers feel overwhelmed and confused by the amount of information available on

sustainable seafood, such as with numerous conflicting seafood pocket guides and product labels, as well as the need to stay constantly updated on the state of specific fish stocks (Cooper, 2005; Harris, 2007; Oosterveer & Spaargaren, 2011; Pelletier, 2007; Roheim, 2009).

2.6 CRITICISMS AND TENSIONS

Sustainability is a diversely defined term in the sustainable seafood movement, and what ENGOs consider to be a sustainably managed fish stock can differ from definitions used by the seafood industry (Roheim, 2009; Silver & Hawkins, in review). The same vagueness can also be seen between actors promoting the sustainable seafood movement and use of words like sustainable and green to further promote their cause. Silver & Hawkins (in review) argue:

“The oft frustrating ambiguity of these words more likely speak to the work by innumerable actors to make public meaning of (or politicize) them according to particular visions or agendas” (p.8).

These particular agendas often differ. ENGOs compete between each other for funding (Schmidt, 2012) as well as promote their own campaigns by “naming and shaming” private companies (Greenpeace, 2008). However, the seafood industry’s ultimate goal is selling seafood for profit gain and addressing consumer demand for products, demand which could further encourage unsustainable fishing. These differing objectives are one reason why there is tension within these governance partnerships. For example, ENGOs wish sustainable seafood to be the new standard, whereas data collected for this research suggests that some retailers consider sustainability to be only one of many product attributes used to make a sale. Vague terminology and lack of standards for what is sustainable is another reason why tensions began to arise within these

governance-partnerships. This final section will focus upon the critiques of, and tensions within, the sustainable seafood movement currently identified within the academic literature.

Silver & Hawkins (in review) analyze the discourse surrounding the cultural production of the sustainable seafood movement and argue that its production obscures the complexities of industrial fisheries. They further argue that the sustainable seafood movement, since its inception, has encouraged both the material and cultural consumption of sustainable seafood as a solution to our ocean's environmental woes. Information is presented by framing the state of fisheries management as a crisis, places responsibility upon the consumer because of the products they are purchasing, and then offers up individualized awareness and action as solutions to that problem through the consumption of sustainable seafood (Silver & Hawkins, in review). Ultimately these narratives, because of how they are being framed and presented, allow little space for questioning the effectiveness of seafood product labelling and consumer guides (Silver & Hawkins, in review). For instance, these campaigns are often presented in a highly positive light. They outline the problem, overfishing, and provide a solution, sustainable consumption, as a chosen solution. This framing provides little space for the consumer to question these provided solutions as well as the information being presented to them from these governance actors.

Kalfagianni & Pattberg (2013) question the ability of market-based mechanisms to address the underlying issues of overfishing, such as the exacerbation of poverty leading to increased pressure on resources. These criticisms can also be reflected in the current discourse regarding sustainable seafood certification and how it effects on the ground implementation of standards for improvement in fisheries management and the formation of alternatives. An example will be used to illustrate these tensions with the Alaska Seafood Marketing Institute and their issues with MSC certification (Foley & Hebert, 2013).

The Marine Stewardship Council is considered to be **the** standard for sustainable seafood ecolabeling (Eden & Bear, 2010; Foley, 2012; Foley & Hebert, 2013; Gulbrandsen, 2006; Gulbrandsen, 2009; Ponte, 2012). The MSC has been largely credited with bringing the issue of sustainable seafood to the mainstream but has also been highly criticised for its monopolization of the certification market, the cost and lengthy certification process, the favoring of large over small scale fisheries, and most importantly the critique that MSC certification has not led to significant improvements in the management of fisheries (Bush et al., 2013; Christian et al., 2006; Foley & Hebert, 2013; Gulbrandsen, 2006; Ponte, 2012; Roheim, 2009). Gulbrandsen (2006) argues that some governments are sceptical of certification schemes like the MSC because of the lack of “legitimacy of non-state bodies to participate in the governance of global commons like coastal and open fish stocks” (p.481). MSC and criticisms of its progress have been highly documented in both seafood industry media and governance literature and compliment Silver & Hawkins (in review) argument of the overshadowed complexities which the sustainable seafood movement washes over when presenting the issue of overfishing to the public.

The Marine Stewardship Council (MSC), created in 1996, was inspired by the market success and governance structure of the Forest Stewardship Council, a certifying body which approves certain sustainable harvesting processes of forestry products (Eden & Bear, 2010). The purpose of the MSC is to serve as a certifying standard, hiring third-party accredited certifiers to grant fisheries certification for producing sustainably sourced seafood based upon the health of the stock, the rate of extraction, management plan, and the fishing methods used (Foley, 2012). The MSC symbol on a product ensures to the consumer that the source has been granted

certification based upon the MSC standard of sustainability, contributing to a boycotting movement to solve fisheries management issues.

Alaska salmon was one of the first seafood products to be certified by the MSC back in 2000 (Foley & Hebert, 2013). Since that time, the MSC has grown to expand its influence globally and is considered to be the dominant force of certification of wild capture fisheries (Christian et al., 2013; Foley & Hebert, 2013; Froese & Proelss, 2012; Ponte, 2012). The Alaska Seafood Marketing Institute (ASMI), which represents the marketing of Alaska seafood products, did not wish to continue paying for re-certification or logo licensing fees to have the MSC symbol on their product. Many in the fishery also felt as though they had no choice but to gain certification to prove to others that they were a sustainable fishery, and so were forced into certification. One ASMI board member went so far as to describe the MSC as “extortion on a scale comparable with the mafia” (Foley & Hebert, 2013, p. 2742).

The state of Alaska is unique in that sustainable management is part of their constitution and proudly boasted as part of their heritage as an industry (Foley & Hebert, 2013). Within the ASMI there was an agreement that products produced in Alaska should not be representing the MSC but should be representing the sustainability standards which Alaskan fisheries are known for. They achieved Global Trust certification in 2011, which is a certification based upon FAO standards and announced in 2012 that they would not reapply for MSC certification (Foley & Hebert, 2013). This became an issue, not only because of the message Alaska was sending to the global seafood industry about their stance on not wanting MSC certification, but also because Walmart had a purchasing policy which stated that they sell only MSC certified seafood products in their stores (SeafoodSource News, 2013). Without certification, Alaska salmon fisheries could put themselves in a position to potentially lose a very large contract with Walmart. However,

despite this potential loss, ASMI went forth with their decision. This example will be discussed in further detail in the Findings Chapters, as well as the outcome of no longer retaining MSC certification and its effects on Walmart purchasing standards.

This example exposes some of the tensions between these different seafood governance actors, and highlights the ways in which processors are frustrated by ENGOs new position of power within the seafood industry. This frustration and need to comply with sustainability commitments then opens the market for the formation of alternatives which will address this new industry demand for different standards and certifications.

2.7 RESEARCH GAPS AND CONCLUSION

To reiterate, the sustainable seafood movement is based upon the understanding that if ENGOs are able to provide information about the destructive practices of the seafood industry, consumers will retain that information, fill in their knowledge gap and it will then influence the choices that they will make when they individually purchase seafood. This informed consumer demand will place pressure upon retailers who will be forced to change their purchasing policies. However, in North America, consumers have not demonstrated a willingness to pay a price premium for sustainable seafood. The reality is that retailers—in anticipation of consumer demand, as well responding to pressure from ENGOs—have adopted sustainable seafood commitments, changed their sourcing policies and invested into educating their consumers on sustainable seafood through partnering with various ENGOs (Schmidt, 2012). As these partnerships begin to diversify, new alternative standards and certification schemes have begun to emerge. As such, it is important to explore the way the consumer is being framed as a

governance actor as an entry point into understanding how retailers and ENGOs have reacted to the still evolving sustainable seafood movement and the power dynamics within it.

As the market for food retailing has become an oligopoly, the choices that these retailers make will greatly influence consumers as well as standards expected to be upheld by suppliers (Busch & Bain, 2004). By focussing on brand image improvements, retailers demand sustainability certifications from suppliers. These retailer choices have a much larger impact on the market than those of consumers (Young & Muir, 2002). The role of the ENGO has proven to be influential in orchestrating both retailer and consumer support for sustainability initiatives, such as product boycotts and awareness campaigns (Eden, 2011; Eden & Bear, 2010; Iles, 2004; Roheim, 2009).

However, the ENGOs role is limited to the amount of support that they have, including the partnerships which they form with retailers (Eden & Bear, 2010). By limiting the ways in which ENGOs influence consumers, engaging only with the upper-middle class demographic, ENGOs are also limiting their ability to spread information to a larger audience, thus constraining possible support (Iles, 2004). ENGOs are able to act in the market-place by establishing partnerships with retailers and directly influencing sustainability standards, making the impact of the ENGO much more dominant (Gibbs, 2007; Gulbrandsen, 2006; Gulbrandsen, 2009; Iles, 2004).

The role of the consumer is very limited in his/her ability to affect change (Eden, 2011; Gulbrandsen, 2006; Ponte, 2012; Roheim, 2009). Information presented by ENGOs and seafood information guides encourage the participation and education of consumers to make a difference, vote with your wallet and change the world (Gulbrandsen, 2009; Ponte, 2012). But the ability of the consumer to individually make a choice is dependent upon what choice is being offered

(Dauvergne, 2010). This is in direct conflict with current framing of consumers as conscious individuals affecting change within the market through their purchasing choices (Clarke, et al., 2007).

There is a growing body of scholarship available exploring the power of the retailer as well as the power of the ENGO in these new governance partnerships affecting change throughout the market, but there is very little information exploring how the role of the consumer is being communicated by ENGOs and retailers participating in the sustainable seafood movement. There have been numerous accounts presented in this chapter exploring the limited ability consumers have shown in utilizing product information (Jacquet & Pauly, 2007; Kemmerly & Macfarlane, 2009; Roheim, 2009). Even more so, consumers have expressed confusion regarding the amount of information being presented to them (Eden, 2011; Roheim, 2009). The consumer's role is further constrained when mis-information occurs due to numerous seafood guides as well as differing standards of sustainability within the market (Eden, 2011; Jacquet & Pauly, 2007).

More research needs to be completed in attempting to understand how ENGOs and retailers present consumers as actors within market-based governance. Only then will light be shed upon the impact that the consumer role can have in affecting change in sustainable seafood management standards. Recognizing the role of the consumer, and their limitations, will impact the ways in which energy and attention by these market actors are invested into creating a more sustainable seafood management system.

Tensions between different actors involved in the sustainable seafood movement also need to be explored in greater detail. This rapidly developing movement had led to many governance partnerships between ENGOs and the private sector, including retailers and seafood

industry representatives. As information exchanges and commitments towards improving sustainable seafood continue, the tensions which are arising can shed light upon both effectiveness of market-based environmental governance as well as what the longevity of the sustainable seafood movement will look like in the future. Further research on this research area would contribute to environmental governance literature as it would shed light upon its effectiveness in addressing global environmental issues through the use of the market-place. The strength of these governance partnerships are dependent upon open dialogue and as tensions surrounding the role of ENGOs such as the MSC, continue to erupt, this could drastically change the landscape of the sustainable seafood movement.

CHAPTER THREE: RESEARCH METHODS

3.1 INTRODUCTION

This thesis was designed to address two central questions: how do large food retailers and environmental non-governmental organizations understand and publically communicate the role of seafood consumers in market-based sustainable seafood governance, and has this changed over time? This chapter will present the research objectives and approach, and trace the methodological steps executed towards the completion of the project. The sections ahead will contextualize the project and its objectives, discuss data sources, including participant observation at an international seafood industry event, and describe the specific methods used to gather and analyze data under each objective.

3.2 METHODS

Table 3.1 below illustrates which methods were used for each objective as well as the data collected for those methods. The discourse analysis for this data was influenced by a grounded theory open coding approach to evaluate themes and draw meaning from publically available reports and media sources to understand how consumers are being communicated by ENGOs and retailers, and this grounded theory approach used during objective one was then applied to the event ethnography from objective two, the International Boston Seafood Show.

Objective	Methods Used	Data Collected
Objective One	Discourse Analysis influenced by Grounded Theory Open Coding	Flyers, annual reports, press releases, advertisements, webpage information from different campaigns and consumer guides, seafood source news articles.
Objective Two	Event Ethnography & Participant Observation	Recordings from conference sessions, photographs of the tradeshow floor, pamphlets collected from the tradeshow floor, field notes.
Objective Three	Discourse Analysis influenced by Grounded Theory Open Coding Bernstein & Cashore's Analytical Framework for Achieving Political Legitimacy	Applied to data collected above.

Table 3.1 – Methods used and data collected for each objective

3.3 RESEARCH APPROACH

This was a qualitative research project and was undertaken in two steps. The first step was to gather public documents, press releases and advertisements within which ENGOs and retailers communicate their contributions to the sustainable seafood movement, including their communication of the role(s) of consumers. I conducted discourse analysis on this data. The second step was to attend the 2013 International Boston Seafood Show, a three-day industry trade show and networking event. Here, I employed participant observation as part of an event ethnography while attending conference sessions and walking the tradeshow floor.

3.4.1 DISCOURSE ANALYSIS

Discourse analysis is considered to be an approach to research rather than a single method. The aim of this approach, as well as one of the aims of this research, is to look at a particular problem and highlight power relationships which are often hidden and then analyze them (Wodak & Meyer, 2001). Discourse analysis also follows in the tradition of grounded theory because the collection of data is not a single phase in the research before analysis but is an ongoing process (Wodak & Meyer, 2001). Therefore as the information was being gathered, following a key word list used to structure data collection, the data was being analyzed and coded. This process was then further repeated, as will be further expanded upon in objective three.

Doel (2010) describes discourse analysis as “a specific constellation of knowledge and practice through which a way of life is given material expression” (p.490). Discourse analysis attempts to describe the power and knowledge which structures these constellations. This type of data analysis can focus upon the dominant discourse, the discourses of resistance or, like the focus of this research, the power struggles occurring between the two (Doel, 2012). Silver & Hawkins (in review) utilize discourse analysis of publically available documents in their study to deconstruct narratives and imagery on the cultural production of sustainable seafood. Similar to my use of publically available documents to understand how the consumer is being presented publically, Roheim (2009) utilizes the analysis of public documents to assess the consistency of standards between different sustainable seafood pocket guides. This type of analysis of publically available data then allows for, as previously mentioned, an understanding of the

current dominant discourse, the discourse of resistance and the power struggles occurring between the two.

3.4.2 GROUNDED THEORY

Grounded theory influenced the discourse analysis portion of this research. It is argued by many qualitative researchers that concepts which are used to describe/define the world should always come from the voices of those who are being studied, and so it is grounded within the study itself (Cloke et al., 2004). Theory evolves through the process of researching whereby there is interplay between the analysis and the collection of the data. Additionally, this method can be used to build upon existing theories (Straus & Corbin, 1994). Through grounded theory, comparative analysis is used and concepts which emerge from data are contrasted to identify the main themes (Donovan, 1988). One example of comparative analysis would be the coding of the seafood show recordings collected for the event ethnography. Different sessions were compared to expose concurring trends in regards to topics and opinions on sustainable seafood, tensions, and the consumer role. More specifically this process involved listening to recordings, coding the transcribed texts and re-reading the codes repeatedly to find patterns within the data.

3.4.3 ETHNOGRAPHIC RESEARCH & PARTICIPANT OBSERVATION

Qualitative and ethnographic research uses observation and interpersonal engagement as a means to gain knowledge about how the world is viewed and experienced by different groups

and communities (Cloke et al., 2004). Participant observation, a primary method of ethnographic research, has its roots in anthropology and involves both participating in the situation being studied as well as recording the information being observed (Iacono & Holtham, 2009).

Economic geographers utilize qualitative and ethnographic research as a means to understand the processes and networks of production, or in this case the processes and politics of consumption, something which Goodman, (2011) argues “have remained relatively over-shadowed and under-examined” (p. 253). This type of work is important for economic geographers because of its ability to experience and learn about these processes, networks and informalities which are often over-looked (Dunn, 2007). This allows for a new level of analysis, with concentrations on social processes which can provide great insight into discourses around consumption and between governance actors. Therefore, qualitative ethnography is a powerful method which allows the researcher to make sense of these relationships and gain greater insight and context into the current discourse around the topic being studied (Cloke et al., 2004).

The data collected from the tradeshow floor enabled me to produce an ethnographic description of how seafood retailers and ENGOs were characterising and discussing the consumer role and the sustainable seafood movement. Because participant observation was conducted during a 'real time' event, the ethnographic description can be understood as a “snapshot” of how sustainable seafood was being internally discussed, debated at the time. This ethnographic snapshot enables a unique perspective on the internal dynamics of the seafood industry as well as offers some insight into how various actors are responding to the challenges, opportunities, and controversies around sustainable seafood. Beyond simply looking at raw data, event ethnographies allow for the opportunity to get a sense of the atmosphere of the tradeshow, including the visual imagery and the tone and body language of conference session speakers.

Event ethnographies have been utilized by many researchers to further gain an understanding of a space and the interactions of participants within that space (leCompte & Schensul, 1999). More specifically event ethnographies have also been conducted at the International Boston Seafood Show by Hebert (2010) and Silver & Hawkins (in review) to gain knowledge about the current discourse within the seafood industry regarding sustainable seafood. Both of these studies prove the validity of event ethnographies as being effective methods of gathering data.

3.5 RESEARCH SCOPE

This research is exploring the role of the consumer as communicated by retailers and ENGOs in the promotion and selling of sustainable seafood. Therefore, the data collected for this research has not been gathered through direct contact with consumers and is not able to address why consumers have as of yet been unwilling to consistently pay a price premium for certified seafood. Rather, this research wishes to understand how consumers have been represented, whether this has changed over time and interpret changes (or lack thereof). In particular, data collected at the Boston Seafood Show enables me to consider tensions being expressed by different actors in regards to consumer demand and the sustainable seafood movement. The data collected at Boston does not disclose the names of the individuals speaking, but rather makes reference generally to their occupation. In certain instances, such as the example of influential actors ASMI and MSC, reference was made to the specific organization being represented but in other instances, such as a buyer for a retailer, reference to the specific name of the company was seen as irrelevant.

Because the sustainable seafood movement is a global movement, there are some mentions of important events which have occurred in Europe, such as the formation of the Marine Stewardship Council, however studying the ways in which consumers are being communicated by all retailer-ENGO partnerships globally would have been too large of a project to complete within the time constraints of a Master's thesis. The data collected for this research utilized a conceptual model which was created by Schmidt (2012) in previous research exploring large Canadian retailer and ENGO partnerships for sustainable seafood promotion (Appendix A). The organizations included in that model provided an excellent point from which to commence my data collection. Those chosen organizations are listed in Table 3.2 below. The information available for these partnerships provides a sufficient amount of data for achieving objective one, exploring how the consumer is being communicated. Because the Boston Seafood Show is an important industry event which also includes Canadian actors, the scope of this research extends to the United States to gain an understanding of how members of the seafood industry (this would include large grocery retailers seafood departments, seafood processors, and producers) are discussing the role of the consumer and the sustainable seafood movement itself, achieving objective two.

ENGO	Retailer
Aquaculture Stewardship Council	Canada Safeway
David Suzuki Foundation	Costco Canada
Greenpeace	Federated Co-ops
Marine Stewardship Council	Loblaws
Oceanwise	Marketplace IGA

Seachoice	Metro
Sustainable Fisheries Partnership	Ovewaitea Food Group
World Wildlife Fund	Sobeys
	Thrifty Foods
	Wal-Mart

Table 3.2 – Large and influential Canadian ENGOs and Retailers

The temporal scope of this research intended to include information stemming from the beginning of the sustainable seafood movement when dolphin-safe eco-labelling was adopted in the North America in 1990 (Teisl, 2004). However a majority of the information collected from ENGO and retailer campaigns was from the year 2000 to 2013 because of the time period in which these campaigns became popularized, as well as the time period when ENGOs and retailers began to establish sustainable seafood partnerships.

3.6 DATA SOURCES

Data collected for the first objective of this research focussed upon publically available documents produced by ENGOs and retailers who have committed to sustainable seafood commitments. Information was collected by going to the websites of these different ENGOs/retailers and collecting information relevant to their sustainable seafood campaigns. Data saturation was considered complete when no new documents could be found being produced by that specific retailer /ENGO. Documents included: webpage information from different retailers such as information detailing a retailers commitment to sustainable seafood;

press releases which announced different purchasing policies or standards such as Sobeys and their announcement of investing in Sustainable Fisheries Partnerships (Sobeys, 2010); campaign information from ENGOs such as Greenpeace and their Carting Away the Oceans campaign which includes Retailer Report Cards grading retailers based upon their sustainable seafood commitments (Greenpeace, 2008); CSR reports such as Loblaw's and their CSR reports updated annually which outline their sustainability commitments as well as measuring their ongoing progress towards those commitments (Loblaw, 2012), and Annual reports such as those created by the Marine Stewardship Council. The purpose of the Annual Reports created by the MSC are to provide an update of the growth experienced by the organization, including financial statements, lists of donors, board members, and new certified fisheries, retailers and restaurants. The first available report covered expansion of the MSC from 2002-2003, with one being released every year since providing 10 years of data. In addition to information collected by these ENGOs and retailers in partnerships, news articles being produced by a popular seafood industry media source SeafoodSource News, as well as links to other popular news sites from SeafoodSource which discussed consumer demand, sustainable seafood, and the expansion of certification both in scope and variety were also collected.

The study site used for the ethnographic portion of this research was completed at the 2013 International Boston Seafood Show, the largest seafood business show in North America (Hebert, 2010). This show was held at the Boston Convention Center from March 10th to the 12th, 2013, with approximately 19,900 visitors attending and 800 individual booths representing different seafood businesses, services, and ENGOs on the tradeshow floor (MSC, 2013a). The purpose of this annual tradeshow is for seafood focussed businesses', ENGOS, and industry representatives to come together to establish business and networking connections, exchange

innovative ideas and information, and create future partnerships (Herbert, 2010). In addition to the 800 individual booths offering their services, there were also scheduled conference discussions circulating around popular topics facing the industry currently such as marketing, business strategies, technology, certification, and sustainability. In addition, there were also press conferences held making announcements about important industry news, for example the Marine Stewardship Council set-up a press conference to discuss both the progress of the MSC, and to discuss the relationship the MSC has with Alaska seafood processors.

Data collected through participant observation at the Boston Seafood Show included pamphlet and flyer information being presented at the booths on the tradeshow floor, photographs taken of the booths and their displays of sustainability commitments and certifications, informal conversations had with tradeshow floor booth workers recorded with after the event note taking and audio recordings of several of the conference sessions attended related to sustainable seafood, consumer demand and seafood retailing.

3.7 ANALYSIS

Before the data collection began, the researcher spent time exploring the academic literature available looking at sustainable seafood, seafood certification, consumer guides, environmental governance, and consumer demand for eco-friendly products. This information provided a context from which to begin research and has been summarized in Chapter 2 of this thesis.

3.7.1 PUBLICALLY AVAILABLE DOCUMENTS

The first half of this research involved gathering publicly available documents. The primary research site for this was the Internet. Data collection started on April 22nd 2013 and the final document was collected January 24th 2014. Websites of focus included those of large Canadian retailers and Canadian branches of ENGOs as well as additional information collected from industry news sources, mainly daily email news updates from Seafood Source News, a free and highly popular news source for the seafood industry. This source explores business, trading, market trends, consumer demand, environmental issues, and any other topics relating to the seafood industry and seafood business globally. Retailers and ENGOs chosen for analysis were based upon the previously mentioned conceptual model created from Schmidt (2012) thesis, exploring retailer-ENGO partnerships for the promotion of sustainable seafood in Canada (Appendix A). The data collected online included looking at publicly available press releases, articles, media reports, flyers, advertisements, photos, videos, pamphlets, and general relevant information being presented on their websites main webpages.

In order to achieve the objective of collecting only relevant information, a list of key terms was utilized when gathering data. These key words have been developed based upon common themes which have been found in current academic literature in reference to both consumers and the emergence of sustainable seafood generally. The key words used to shape the collection of data from these sources included: sustainable seafood, certification, consumer, consumer choice, conscious consumer, consumer demand, and ENGO-retailer partnerships. Because this research is a temporal analysis, time was also spent attempting to ensure that as much information from the longest time period during the sustainable seafood movement could

be collected. However, because of the short life span of the sustainable seafood movement and its only recent adoption by retailers in Canada, gaps in temporal information were then further supported by academic literature discussing developments within the north American sustainable seafood movement, for example earlier campaigns, as well as information from ENGOs from other countries such as the UK and USA.

3.7.2 THE BOSTON SEAFOOD SHOW

The purpose of attendance at the Boston Seafood Show was to gain a general understanding of the ideas being exchanged, as well as the tensions surrounding the topics of sustainable seafood, certification, and consumer demand. Although short in duration, this event was a unique opportunity to gain knowledge on these industry tensions occurring in 2013 due to the high volume of industry which attend, all of which are providing and promoting company information via booths displays and pamphlet information. Prior to leaving for Boston to attend the 2013 International Boston Seafood Show, ethics approval was obtained from the University of Guelph ethics board to conduct this research.

The ethnographic snapshot for this research was completed by attending conference sessions at the Boston seafood show and observing the booths on the tradeshow floor. Attending the conference sessions allowed for an understanding of what the current issues are within the seafood industry as well as discovering which actors are taking a more central role in the promotion of partnerships with ENGOs, certification and the sustainable seafood movement. Observing booths on the tradeshow floor allowed me the opportunity to see how different companies are choosing to market their brand by, for example, choosing to promote the

sustainability, responsibility, and/or certification of their products. This information speaks to the numerous ways in which seafood processors, retailers, and suppliers have chosen to or not to adopt the sustainable seafood movement.

Because the tradeshow was attended by both my academic advisor and I, each morning of the show, we would look at the list of conference sessions for the day, provided in the information book given to tradeshow attendees, and decide upon which session to attend. This would depend upon the topic of the session and its relevancy to the research. For instance, if two sessions occurred at the same time and had similar topics relating to this research area, I would attend one, taking notes throughout and my academic advisor attended the other, recording the session and sharing that data with me afterwards. A complete list of the 2013 conference sessions' titles can be found in Appendix C with the conference sessions attended for this research highlighted in bold font.

Conference/Panel sessions were set up with at least three presenters, with some exceptions of one presenter, with average session running time from one to one and a half hours. The topics of the talk were presented in the titles and the panels represented experts of various different positions, such as ENGOs, restaurant owners, retailers, suppliers, but all focusing on current issues facing the seafood industry. Each session was set-up with an introduction usually by the sponsor of the session, presentations by all speakers and then concluding with a question and answer period. Panel sessions were recorded with an audio recorder and notes were also taken with time stamps for when very relevant information was mentioned as well as any tensions being expressed. Panel sessions talks for the 2012 International Boston Seafood show were available via a conference session DVD including the recordings of all talks. Panel sessions

from the 2011 International Boston Seafood show were recorded by my advisor when she attended the show, two years prior.

Information gathered on the tradeshow floor was collected by looking for representations of the key words listed under objective one. If these representations were present at the booth, such as in their large visual displays, the booth was photographed to record these representations and pamphlet information from that booth was also collected, as can be seen in Figure 3.1 below, with the booth Northern Harvest Sea Farms. Their promotion of Best Aquaculture Practices (B.A.P.) certification was a central feature to their booths visual display, with the certification symbol being almost as large as the image of their fish farms, the business's central focus. The information gathered from the booths was later organized by tagging each piece of information with the number of the photograph taken of the booth where that information was collected. This collected data was used to gain an understanding of the way consumers were being framed within the sustainable seafood movement and also as supportive information to compliment what was being said at the panel sessions. This data provided a unique time specific representation of dominant industry framing of the consumer role and the sustainable seafood movement.



Figure 3.1 — Northern Harvest Sea Farms booth as photographed by the researcher at the 2013 International Boston Seafood Show.

I engaged informal conversation with various booth representatives from the tradeshow floor. Information collected through informal conversations did not include the person’s name, or the company they were representing. This information was recorded via summarized or point form note taking after the conversation has taken place to ensure the participant was not distracted or uncomfortable from the researchers note taking. For example:

“Spoke to BLANK. They have been at the show for 4 years and have found that there has been an increase in interest [about sustainability] over time. Wal-Mart announcing MSC in 2006 really jump started interest for other retailers because they felt consumer pressure and people were approaching BLANK because consumers were approaching them” (Field notes, Tues. March 12th 2013).

Taking summarized notes after the conversation also ensured that I was able to be fully engaged in the conversation and give appropriate responses (Laurier, 2012).

If asked, any persons interested in understanding why this research was being undertaken was provided with an information sheet including both my name and contact information, the

researchers academic advisors contact information, as well as a brief outline of the research being conducted and its direct affiliation with the university of Guelph. This form can be found in Appendix B.

3.7.3 CODING OF COLLECTED DATA

Coding was applied to information collected from both Objective One and Two for this research. Central to the process of grounded theory is the coding of data to discover patterns, trends, key words and themes. By gathering qualitative data, simultaneously creating a hypothesis, and pulling out concepts/key terms from that data, the process of grounded theory allows for the information to speak for itself (Donovan, 1988). One example of this would be the key word list presented for achieving objective one. Originally, one of the terms from the list being used looking for consumers was the conscious consumer, but through the coding process it was revealed that consumer demand was much more prevalent and also spoke more to trends about how consumers were being spoken about and so demand became the node used instead to represent this found pattern. A node is the name of the phrase or word you are using for your code. Another example of codes found from within the data would be the node Governance Stakeholders, which was used to point out when different groups were discussing the important actors involved in the sustainable seafood movement. Through this node, another node emerged titled No Consumers which would be used when consumers were not considered to be part of the core group of actors involved in the sustainable seafood movement.

The data analyzed was coded using Nvivo qualitative research software. This software is a research tool which allows the researcher to upload multiple types of data onto a single

program so that it is all in one place. Nvivo is used to aid in organizing the data by allowing you to code different types of data (photos, recordings, pdfs...) with specific words or phrases and this subsequently aids in finding patterns, key words and trends within the data. For example, in Nvivo codes are called nodes and can be created by the researcher, organized around specific words or phrases. Once a document is open, a section or phrase can be highlighted and that highlighted section can then be coded by any node created by the researcher. That information is then added to the node which becomes a compiled list of all data coded under that node, making organization of themes an easier task.

The first step of coding involved taking all documents collected and uploading them to Nvivo. These documents were then divided into folders based upon the ENGO, retailer or seafood news source which produced them. Data collected at the Boston Seafood Show was also uploaded to Nvivo but kept in separate folders because it was analyzed after the other data. The documents were then coded as either ENGO or Retailer, the name of the organization that produced them, and the date that they were published, however if that date was unavailable they were coded as the date they were assessed by the researcher. An example of this would be documents which contained information found on the webpages of different actors, but did not include a date of publication, such as homepage information.

Recordings were transcribed within the Nvivo program by listening to the recordings and typing them out in a summarized fashion. If direct quotes were needed later on, the researcher would go back and re-listen to the recoding to get a word for word quote.

ENGO	# of Documents Coded	Retailer	# of Documents Coded
Aquaculture	19	Canada Safeway	12

Stewardship Council			
David Suzuki Found.	38	Costco Canada	6
Greenpeace	36	Federated Co-ops	15
Marine Stewardship Council	52	Loblaws	34
Oceanwise	22	Marketplace IGA	4
Seachoice	22	Metro	20
Sustainable Fisheries Partnership	7	Overwaitea Food Group	11
World Wildlife Fund	27	Sobeys	12
		Thrifty Foods	10
		Wal-Mart	10

Table 3.3 — Total number of documents collected and coded produced by Canadian ENGOs and Retailers.

After the information was sorted by folder each document was analyzed and coded initially for any mention of consumer or the sustainable seafood movement. As more documents were read, patterns began to emerge and so new codes were created and applied. As part of grounded theory, the coding process is also part of the analysis process and so codes are reviewed and added to multiple times. After the initial stage of coding for consumers and the sustainable seafood movement generally, the list of information which was coded as consumers was then re-coded and further divided into more specific nodes. Because of the volume of documents collected, 586, this list of coding compiled under the Consumer node proved to be the main source of information for this research. A complete list of nodes and their meaning can be found in Appendix D.

To further organize the data, and do a temporal analysis, two separate word documents were created. The first one was titled Communication of consumers and was set-up as several

tables. Each table belonged to either an ENGO or Retailer and was divided by year of publication to gain more of an understanding of how each actor was communicating the consumer role over time as well as see how long the organization was involved in the sustainable seafood movement. The second document was titled Meaning of Nodes and was a representative sample of information from each node used for this research, placed into a smaller more manageable list. Because numerous documents were collected from each organization, as can be seen in table one above, there was a large amount of repetitive information being produced by the same organization. This included multiple similar documents produced in the same year, and so, making a smaller list allowed for a more concise analysis. These two tables were then re-analyzed to search for different patterns and trends and also used as a quicker point of reference when wanting to access specific quotes during the writing process.

I emailed many of the organizations and companies included in this research seeking out older information which may no longer be online because it would be considered out-dated but would still be useful for a temporal analysis. This did not result in the discovery of many new documents but this did result in three over the phone informal conversations with employees of one retailer and two ENGOs. Following the same reasoning of the informal conversations had with booth representatives at the Boston Seafood Show, these conversations had no formal questions set-up and so were more of an open conversation about the general topic of consumers, the role of the retailing industry and sustainable seafood. The only difference between these conversations and the conversations from the Boston Seafood Show was that notes were taken during the talks because the participant was not physically there to be distracted or intimidated by note taking. Because this information was summarized in notes it was not coded but instead used only for reference and kept in the researcher's journal for use during the writing process.

3.8 SUMMARY

This chapter has outlined the steps conducted for the collection and analysis of data for this thesis. It has presented the various types of data that have been collected and analyzed for this research. These include publically available documents, photographs, field notes and audio recordings. This chapter has also explained the relevance and application of the various methods used: event ethnography, participant observation and discourse analysis informed by grounded theory open coding. The utilization of these methods has allowed for the three main research objectives to be achieved. The next two chapters will present the findings from the analysis of the collected data. Chapter Four will present the relevant findings retrieved from the data collected for objective one and Chapter Five will present the relevant findings retrieved from the data collected for objective two.

CHAPTER FOUR: FINDINGS PART ONE: ENGO-RETAILER COMMUNICATION OF THE CONSUMER

4.1 INTRODUCTION

The purpose of this chapter is to present to the reader the major findings of this study in fulfilment of objective one of this research. In doing this, the chapter explores the power dynamics which have arisen amongst governance actors in the sustainable seafood movement. Although consumer willingness to pay more for sustainable seafood in North America has not grown significantly (Gulbrandsen, 2006; Kemmerly & Macfarlane, 2009; Roheim, 2008), the volume of certified sustainable seafood available in the marketplace continues to increase. As this chapter demonstrates, this is evident in the numerous ways publically available documents produced by ENGOs and retailers frame the role of the consumer in the sustainable seafood movement and market certified seafood more broadly. I argue that ENGOs and retailers seek to stimulate demand for certified seafood, rather than re-evaluating or changing the broader market-based approach and objectives of the sustainable seafood movement.

Specifically, the chapter outlines that the way the consumer is being communicated by the Marine Stewardship Council has demonstrably changed over time. In addition, this chapter demonstrates the first and second argument made in the introductory chapter of this thesis: **1.** In the data, the consumer is presented as both active or as passive; and, **2.** The sustainable seafood movement has grown away from a basis in the power of consumer demand and instead has the potential to become a tool by powerful retailers through their market influence to promote seafood consumption and promote an image of that industry which is both sustainable and responsible.

The ways in which ENGOs and retailers present the role of the consumer will be shown to differ between campaigns. Some organizations position the consumer as central to their success, whereas others, mainly retailers, position the consumer passively and attempt to engage and educate them about sustainable seafood; however, there is rarely explicit mention of no consumer demand within these campaigns. There is little temporal variation in how these different actors position the role of the consumer within their campaigns and so the positionality of the consumer has more to do with brand image and competition between actors than an actual reflection of the current lack of consumer demand for sustainable seafood. In other words, overall the re-production of these campaigns is not reflective of consumer demand realities and are being promoted for the sake of competition between different actors. This argument will be further supported in the second findings chapter presenting data collected at the Boston Seafood Show.

Evidence for this chapter will be presented in two sections. Section One will present the ways in which the Marine Stewardship Council has discussed the role of consumer demand for sustainable seafood over time. Section Two will provide several examples demonstrating how other ENGOs and retailers are communicating the role of the consumer. The retailers included in this study position the role of the consumer as passive, meaning it is the retailer which is the main actor creating change through their actions, whereas the ENGOs position the consumer as active, meaning they are still providing demand and creating the change moving the sustainable seafood forward.

4.2 THE MARINE STEWARDSHIP COUNCIL

Since its formation in 1997 the MSC and their global influence as a wild-stock certifier has rapidly grown. To put this into perspective, the MSC went from one fishery certified in 2000 to 10 fisheries certified, as of 2003 (MSC, 2004). Fast forward to the most recently available stats, only 10 years later, and the MSC has 198 fisheries certified spanning 88 species available in 106 countries (MSC, 2013). Because of its rapid growth and because the MSC is seen as the leading organization and standard in seafood certification, MSC press releases and Annual Reports have been a central source of data in my exploration of how the consumer role has been communicated through the emergence and evolution of the sustainable seafood movement in North America.

Throughout the Annual Reports there has been a change in the way consumer demand and the role of the consumer has been communicated. Although the MSC only came out with a formal mission statement in 2006, (formal meaning the statement begins with Our mission is...) there are many statements which the MSC makes in its earlier reports which frame the consumer in an active and central role to the success of market-based governance.

For example, in a 2001 press release discussing MSC's introduction at the Boston Seafood Show, the MSC stated that "The certification program uses consumer purchasing power to reward fisheries applying sustainable management practices" (MSC, 2001, p1). This statement suggests that consumer demand and purchasing power is what drives the sustainable seafood movement and rewards fisheries for their choice to gain certification.

The same sentiments are echoed in the first annual report produced for 2002-2003:

"As the MSC continues to gain recognition we plan to roll out the programme in an increasingly consumer-focussed manner to drive demand back through the supply

chain. Consumers in many countries now know about the problem of overfishing— increasingly they know what they can do about it too” (MSC, 2003, p5).

Here the consumer is also framed as an active contributor to market-based environmental governance because their demand is providing incentives by creating pressure through the supply chain. MSC is demonstrating what many ENGOs have in the past, that if consumers are aware of the current issues and are provided the necessary information, they will change their purchasing habits and demand change by voting with their wallets. However, as has been demonstrated in the literature review, consumer choice is not so simple, and consumer value of products can differ, with consumers often considering other product values to be of more importance than sustainability (Gulbrandsen, 2009; Roheim, 2008) such as health, freshness, and cost (Leire & Thidell, 2005).

Despite foregrounding the consumer, the MSC is explicit that as a contributor to global environmental governance, there are many other stakeholders involved. The same 2002-2003 report expresses the importance of all governance stakeholders, but once again, maintains the centrality of consumers in driving progress:

“The MSC is a market driven programme. Critical to its success is engaging retailers, the food service sector and their suppliers to access consumer markets. Over the last year we have seen leading organizations develop sourcing policies with the MSC principles at their core. These moves resonate with the environmental concerns of their customers often are one step ahead by anticipating their concerns” (MSC, 2003 p.13).

What is of relevance here is that retailers are said to anticipate the concerns of their consumers. The inference is that although there is not significant demonstrated consumer demand currently, there will be; firms that get on board now, will be rewarded in the future.

The report released the following year (2003) slightly changed their use of language and discussed the need to “harness” consumer power. These same sentiments were echoed in the

Annual Report 2004-2005: “The MSC seeks to harness consumer power to support and encourage sustainable and well-managed fisheries “(MSC, 2005 p.1). Consumer power is still considered to be vital to incentivize fisheries towards certification, but rather than consumers demanding sustainable seafood, their consumer power must now be harnessed. This same report also acknowledged the need for even more consumer and market demand for sustainably certified seafood products:

“The MSC could be approaching a tipping point in terms of more fisheries coming forward for assessment and consumers, whether business-to-business or end consumers, beginning to demand sustainable seafood choices. There is still a long way to go and it will certainly require additional resources to get us to that point, but our plan and aspiration, working closely with our partners across the seafood supply chain and within the conservation community is to get there!” (MSC, 2005, p. 24)

This quote seems to acknowledge that there is still more work to be done to popularize sustainable seafood and MSC certification specifically. In other words, rather than pre-existing the emergence of MSC certification, consumer demand for, as well as awareness of, sustainable seafood is seen as something that must be fostered.

In addition, and momentarily stepping away from a focus upon the consumer, the previous quote could also be alluding to future changes in the retailing world of North America. For example, in that same year Lee Scott, President and CEO of Walmart at that time, made a speech where it was announced that Walmart would be drastically changing its CSR policies and environmental goals across the board from renewable energy, reduced waste, lower fuel consumption, and product sourcing. One of the announcements also included sustainable sourcing of seafood sold in their stores “according to environmental and socio economic best practice standards through third party accreditation” (Scott, 2005, p.4). This connection becomes more apparent when we consider that only one year later Walmart made the announcement to

sell only MSC certified seafood products in their American store locations (Wal-Mart, 2006). Such a large and influential global retailer making commitments across its American locations would represent a tipping point for the CSR commitments of the retailing world in North America as well. This point is furthered in comments made by MSC after Walmart's announcement: "Walmart steps forward. The business case for retailers is now well-established" (MSC, 2006, p.6).

In the 2007-2008 Annual report the MSC came out with the formal mission statement that they have used in every annual report since:

"The MSC's mission is to use our ecolabel and fishery certification programme to contribute to improving the health of the world's oceans by recognizing and rewarding sustainable fishing practices, influencing the choices people make when buying seafood and working with our partners to transform the seafood market to a sustainable basis" (MSC, 2008, p.3).

The way the consumer role has been communicated has changed, no longer providing the demand to create the change, the MSC explicitly states that one of their main goals will be to influence the choices that consumers make. Consumers are no longer framed as actively feeding demand through the market for sustainable seafood within the MSC mission statements.

Information alluding directly to consumer demand for sustainable seafood in subsequent Annual Reports have been included in quotes by benefactors and supporters of the MSC rather than being directly stated by the MSC. Here are two examples of this:

"It is clear more and more consumers are looking for a guarantee that the produce they are eating is sourced in a sustainable manner, and schemes such as the MSC play a valuable role in promoting fish consumption" (Alex Salmond In: MSC, 2008, p.3).

"The Marine Stewardship Council offers a unique and inspiring contribution to solving this global threat. It harnesses the purchasing power of consumers and the skills of fishery managers to promote fisheries that are genuinely sustainable in the

long term. Its vision of seas restored to both health and wealth has won the support of conservationists, governments, the fishing industry and consumers around the world” (David Attenborough In: MSC, 2013, p.2).

These quotes further the previous point that the MSC does not directly claim consumer demand as an influential force within its Annual Reports because it has not been demonstrated, however they can include the opinions of those who do not directly work for the MSC but who have felt/seen the benefits of the program.

Connecting back to the main research question, how have ENGOs and retailers reacted to consumer unwillingness to pay for sustainable seafood, the MSC has reacted by further promoting their certification program, engaging with social media, revamping their website, and even re-designing their consumer facing label so that consumers are aware of what the MSC symbol stands for:

“If shoppers take seconds to decide which product they will buy, then the MSC ecolabel needs to communicate instantly. Following a 14-month research project to gather the views of consumers, partners and stakeholders, we launched a revised ecolabel in July 2009. The new design is a modification of the original ecolabel and conveys more meaning. By adding the text ‘certified sustainable seafood’ the new design clarifies the primary significance of the ecolabel on product – as an ingredient that can enhance the product brand” (MSC, 2010, p.21).

Along with what their mission statement claims, the MSC is concentrating its efforts into influencing the choices that people make when purchasing seafood, so they too can contribute to improving fisheries management through market-based governance, ultimately acknowledging that consumers are not demonstrating demand.

When discussing plans for the future of the label there is acknowledgement of how changes in demand can alter the success of the eco-label and is considered to be a challenge for

the future of the MSC. In their Five Year Strategic Plan for 2012-2017, the MSC identifies issues which arise with market-based mechanisms:

“Potential slowdown in demand for the MSC program in core markets: The MSC’s success depends on engagement from both the buyers and sellers of seafood. As a voluntary, market-driven program, continued demand for the MSC program is never guaranteed: Fisheries can choose to leave the program, buyers can seek other forms of assurance, and consumer interest can shift. In the next five years MSC will redouble efforts to maintain and increase demand in core markets, as this demand is the driver of the program” (MSC, 2012, p.4).

By redoubling their efforts, the MSC is further trying to engage consumers and increase their awareness of the MSC program as it continues to expand globally. In addition, this statement could be acknowledgement of the tensions and criticisms which the MSC has experienced due to a lack of demonstrated consumer demand for sustainable seafood.

It is the continued and highly publicized criticism from ENGOs, retailers and the seafood industry which I argue is the reason why the MSC has made it clear that consumer demand is not fueling their efforts, thus avoiding criticism for a lack of demonstrated consumer demand for their products. Further, the mention of loss of fisheries during Boston could be an acknowledgement of the loss of the ASMI salmon producers discussed in Chapter Two, as well as the up-take of alternative forms of market-based governance, such as FAO-based certifications, Fisheries Improvement Projects and privately produced consumer facing product labels.

4.3 ENGO AND RETAILER FRAMING OF CONSUMER ROLE

Outside of the MSC, there was little to no change over time in the way the consumer was being communicated within the data collected from the ENGOs and retailers analysed for this research. Rather, each actor chose to position the consumer in a way which is reflective of their position and brand as an ENGO or retailer. In addition, and as has been addressed by Schmidt's (2012) research, these different actors choose to create unique consumer focussed campaigns to stay competitive between each other in the marketplace. ENGOs need to demonstrate to their supporters that they are addressing this current and hot topic issue or risk loss of donations from their supporters. Retailers need to remain competitive with other retailers, therefore if one retailer promotes sustainable seafood and changes their sourcing policies, other retailers must follow suit, or risk potential loss of consumers to other stores in the future (Roheim, 2008; Schmidt, 2012).

One example will be used here to illustrate the differences between campaigns: Loblaws, Canada's largest buyer and seller of seafood, was the first large Canadian retailer to establish a sustainable seafood campaign, in partnership with WWF, in 2009, with a focus upon selling 100% sustainable seafood by 2013 (Loblaws, 2009; Schmidt, 2012). Sobeys, one of the Loblaws main retail competitors, announced in a press release the following year that they would also be changing their sourcing policies but would utilize a different strategy (Sobeys, 2010). Sobeys would be investing in Fisheries Improvement Projects in order to "fix the worst first" implying that not only are they committed to sustainable seafood, but they are further committed "to helping improve the long-term viability of both wild caught and farmed seafood with an innovative approach to benefit both fisheries and customers" (Sobeys, 2010, p.1). Additionally,

Sobeys introduced a seafood traceability program which would grant consumers the ability to send messages online directly to the fisherperson who caught the seafood they purchased. The differences in these campaigns are also illustrated by the different ENGOs which retailers have chosen to partner with, listed in Appendix A.

Although each of these retailer-ENGO campaigns are different, when it comes to information being produced by the retailers included in the study, the consumer is rarely framed as the main actor creating change. The main actor in all of the retailer produced documents (CSR reports and press releases) is the retailer which created them and the campaign is a promotion of the ways in which their commitments will create positive change. Specifically, the retailer positions themselves as the main actors creating change and providing that change for their consumers. The retailer is then ultimately positioned as the educator of the consumer, thus providing another service to their customers as a business. In contrast to this, when looking at information being produced by ENGOs about their sustainable seafood campaigns, the consumer has been positioned as both providing demand to move the sustainable seafood movement forward, as well as creating change through their participation. Table 4.1 and 4.2 below illustrate the wording used to engage and discuss the consumer in these publically available documents, and also demonstrates the contrast between how ENGOs and retailers communicate the consumer. The documents included for analysis are representative of how each different actor frames the consumer. For instance, although Marketplace IGA has a partnership with Oceanwise, documents used to represent these two actors were not co-produced and rather were taken from the separate websites of these different actors. A few examples for both Retailers and ENGOs will also be presented to illustrate the differences in how the consumer was being framed.

Retailer	Position of Consumer	Wording	CSR Commitments
Loblaws	Passive	Helping to educate consumers about oceans issues. Driving consumption habits. Loblaws helps you make good choices.	Five Pillars: Respect the Environment, Source with Integrity, Reflect Our Nations Diversity, Be a Great Place to Work.
Overwaitea Food Group	Passive	Providing customers with ocean friendly options. We provide the information customers need.	Core Values: Service, People, Innovation, Fun, Integrity.
Federated Co-ops	Passive	Co-ops makes it easier for consumers to make sustainable choices with increased labelling info. Educate consumers about sustainable seafood.	Five Key elements of Social Responsibility: Fiscal Responsibility, Environmental Sustainability, Co-Operative Leadership, Community Investment and Employee Engagement.
Walmart Canada	Passive	You don't have to worry, we have made it an easy choice. We are providing our customers with sustainable choices.	Core Beliefs: Respect for the Individual, Service to Our Customers, Striving for Excellence.
Metro	Passive	Offer our customers sustainable choices. We help consumers make informed choices.	Four Pillars of Intervention: Respect for the Environment, Empowered Employees, Strengthened Communities, Delighted Customers.
Marketplace IGA	Passive	Consumers can make ocean friendly choices at our stores. We encourage consumers to buy sustainable seafood	No corporate core values listed. Owned by Sobeys.
Sobeys	Passive	Providing information which consumers can understand. Educating our customers.	No Formal List. Focus is upon Community Involvement, Sustainability and Scholarships.
Thrifty Foods	Passive	We make it easy for customers buy sustainable seafood. Educating and empowering consumers.	Core Values: Always Place the Customer First, Get it done with Passion and Integrity, Stay Real, Proudly Serve Our Communities. Owned by Sobeys.
Canada Safeway	Passive	Providing healthy options for our customers.	People, Products, Community, Planet.

		Educate consumers about seafood concerns.	Recently purchased by Sobeys.
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Table 4.1 — Retailer framing of the consumer role

Organization	Position of Consumer	Wording
Aquaculture Stewardship Council	Active in creating demand	Consumers demanding responsible rather than sustainable sourcing.
David Suzuki Foundation	Active in creating demand	Voting with your wallet. Focal point is Your Choices Simple and Effective Solutions
Greenpeace	Active in creating demand	Consumers need retailers in order to make change. Consumers need to be informed about sustainable choices.
MSC	No longer active in creating demand	From consumer demand to influencing consumer choice.
Oceanwise	Active in creating demand	Ocean wise empowers consumers. Easy choices to make.
Seachoice	Active in creating demand	Simple and easy acts to make. Voting with your wallet.
Sustainable Fisheries Partnerships (SFP)	Not a consumer focussed ENGO.	Provides information for companies involved in SFPs, does not discuss consumer role.
WWF Canada	Active in creating demand	Consumer demand is a powerful choice.

Table 4.2 — ENGO framing of the consumer role

4.4 RETAILERS FRAMING: PASSIVE CONSUMER

Loblaws has a very strong brand image which represents responsible business practices, innovative low-cost products and great customer service. Their Oceans for Tomorrow campaign, created in partnership with WWF, has an extensive educational component and is an extension of the carefully crafted brand name that Loblaws has created. Information available on their website in addition to their sustainable seafood commitments includes explanations of different fishing

methods, multi-tropic aquaculture and promotional information on the popular documentary *The End of the Line*. However the main actor creating change in their campaign is not the consumer, but Loblaws itself. When discussing change, the focus is placed upon how Loblaws is going to create change and provide solutions to their consumers rather than the assumption of responding to consumer demand:

““The world’s oceans are facing an unprecedented crisis,” said Galen G. Weston, Executive Chairman, Loblaw Companies Limited. “Loblaw is determined to think differently about how it sources seafood and to work in collaboration with the fishing industry and environmentalists to seek sustainable alternatives for customers.”” (Loblaw, 2009, p.1)

All of their published documents were promotions of what Loblaws has done and were situated around engaging others to help Loblaws with their task. This campaign very clearly expressed Loblaws concern as a retailer and frames sustainable seafood as a new service of responsibility and traceability of products to be provided by the retailer, ultimately positioning them as the main actor for change. This notion of traceability of products as important for consumers has also been presented in the media. For example, one article for the *Globe and Mail* highlighted traceability of products as the new expectation of consumers globally from their grocery retailers who have access to important product sourcing information on not just seafood but dairy products, meat products and fruits and vegetables (Leung, 2011).

Rather than specifically discussing consumer demand for sustainable seafood, Loblaws campaign speaks more broadly to overall consumer concern for product sourcing, which could also include things such as health, organic, local and human rights as presented here in their CSR Annual Report:

“We know that our customers expect us to buy and sell our products responsibly. They also expect that we will take the necessary actions to promote the health and vitality of our food sources, ensure product safety, support the Canadian economy,

and require our vendors to uphold the right values in areas ranging from labour conditions to animal welfare. We expect the same of ourselves and are doing our utmost to live up to the highest standards of responsible sourcing” (Loblaws, 2011, p.15).

They demonstrate that consumers have concerns about environmental issues but do not state that they are demanding anything from their retailers. Rather, as customers of Loblaws, there is an expectation that their retailer is making the right choices for them so they don’t have to spend their time conducting research on product sourcing and sustainability claims.

Sobeys sustainable seafood campaign focusses upon providing what it was their consumer’s wanted. Since the beginning of their campaign in 2010, the consumer was understood to be a confused actor, requiring education and guidance towards making appropriate seafood choices and Sobeys positions themselves as providing that needed guidance:

“Sobeys will simplify its customer education by focussing on what customers have told the company they want most: greater understanding of where the problems are and what is being done to correct those problems” (Sobeys, 2010, p.1).

And,

“Seafood sustainability is a complex and ever-changing set of issues. We want to simplify it and make it easier for customers to make informed seafood buying decisions. With that knowledge, like the man in the proverb, we hope to feed our customers for a lifetime” (Sobeys, 2011, p.39).

Sobeys, similar to Loblaws, has positioned themselves as the solution to these complex issues.

Because their consumers are shopping at their stores, they are told that they do not need to worry about the complexities behind sustainable seafood.

Federated Co-op, a west coast retailer, established a sustainable seafood campaign in partnership with Seachoice in 2010. Similar to the previously mentioned campaigns, the position of the consumer is not central in creating change in the sustainable seafood movement. The

retailer positions themselves and their campaign as the ultimate force in creating change. Here are two examples from sources describing Federated Co-ops partnership with SeaChoice:

“Co-op will now label their seafood products with green and amber SeaChoice stickers to reflect the sustainability of each product. Customers will not only have more access to ocean-friendly choices, but it will be much easier for shoppers to identify sustainable products with improved labelling” (Federated Co-op, 2012, p.1).

And,

“Hanover still offers select FishWise red-list species (items to avoid) because of shopper demand...Hanover carries some red-list items but doesn't advertise them. “Our approach is to educate the consumer, including letting them know they may want to find another fishery that has a higher rating, and then let them make the decision, says Whites” (Blank, C. 2012, p.1).”

Both quotes illustrate that Federated Co-ops role was providing information to their consumers and the focus was also upon presenting an easy choice for consumers to make when shopping in their stores. However in the second quote shown, the retailer acknowledges that consumer demand was what was driving them to keep red-list species (unsustainably sourced) in their counters in their Hanover location. Rather than remove them, as a retailer, they wished to offer choice to the consumer. In other words, the retailer would still sell unsustainable seafood if consumers presented the demand for them.

In a recent article by the Telegram, a popular newspaper from Saint John's Newfoundland, there was discussion of the lack of consumer responsiveness to sustainable seafood campaigns. Galen Weston, executive chairman of Loblaw's Companies Ltd. spoke at the 2013 World Seafood Conference and expressed the “big challenge” that it has been for Loblaw's to engage consumers in sustainable seafood and support their goal of selling 100% sustainable seafood by 2013 (MacEachem, 2013). Even after investing heavily in their promotional campaigns they have not seen the support they predicted would come:

“ “Back in 2009, just after the economic crisis, there was still an enormous wave of enthusiasm on the part of the Canadian consumer in support of sustainability initiatives,” said Weston.... “But because seafood happens far away from many people in the population of Canada — obviously, not people here — and because it happens under the sea, people don’t really get a chance to see what’s going on, how things are caught, and some of the challenges around bycatch and the like””
(MacEachem, 2013, p.2).

This signified that, at least for Loblaws, that there was an assumption that consumer demand for sustainable seafood could be fostered, even if not originally demonstrated. He went on to further discuss how the greater success of the program was found within the fishing industry which wanted to support the program and the marketing opportunity in Canada to sell their products as sustainably sourced. Thus the consumer was understood as not providing demand, but the campaign and positionality of the consumer did not change.

Retailers have been very keen in taking on the role of educator for their customers when it comes to the promotion of sustainable seafood. This establishes a new relationship between retailer and consumer based upon positive messages and trust. These campaigns frame the retailer, and their business practices in a positive light to the consumer. The retailer they shop at is not only doing the right thing but cares enough to promote and educate its consumers about it and further, actually engage them on these issues.

What these examples of retailers tell us is that the retailer wants to be seen as providing solutions but doing so in a way which is easy to understand and to participate in for their customers. Although the ways the consumer is being represented is more reflective of the realities of consumers today, being confused and not demonstrating demand, the ways in which the consumer has been discussed by the retailers included for this research have not changed

over time. Rather, the focus of these campaigns is more upon the retailer and what they are able to do with their position in the supply chain to create change.

Differences between campaigns can be reflected in the brand image of these retailers. For instance, Loblaws which invests into a brand image which is environmentally conscious produced the most extensive sustainable seafood campaign out of all the retailers included in this research. Their CSR reports outline their commitments as a retailer to include Five Pillars, two of which are respecting the environment and sourcing with integrity (Loblaws, 2012). Costco Canada, on the other hand, whose main objective is selling wholesale and who was included in the original conceptual model created by Schmidt (2012), had no information available on its website regarding its sustainable seafood commitments in Canada or the USA. Additionally, several different retailers, as indicated in Table 4.2, are owned by Sobeys (Thrifty Foods, Marketplace IGA, and most recently Safeway) but continue to promote different sustainable seafood commitments in their stores in partnership with different ENGOs. Therefore the investments made into promoting sustainable seafood are dependent upon how important these campaigns are to the overall brand image being produced by that retailer.

4.5 ENGO FRAMING: ACTIVE CONSUMERS

Greenpeace Canada created a campaign in 2008 titled Out of Stock. This campaign, stemmed from a successful Greenpeace UK campaign formed in 2005. Rather than focussing upon the power of the consumer, this campaign focussed upon the role of the retailer as the ultimate way to create change in sustainable seafood sourcing. This ENGO considers it up to the

retailer to make changes and contribute to solving the fisheries crisis by providing sustainable options and only supporting suppliers with sustainability credentials, such as being certified:

“As the link between the consumer and the producer, supermarkets have a unique role to play in ensuring fish for the future. Greenpeace is asking Loblaw and other retailers to take the pressure off threatened fisheries now by purchasing their seafood only from sustainably managed fisheries. If they don’t, there soon won’t be any fish left to sell” (Greenpeace, 2008, p.1).

By placing direct public pressure upon retailers and their sourcing policies, Greenpeace aims to frame the retailer as the most powerful actor and hold them accountable for the products that they choose to sell in their stores.

Greenpeace does position the consumer as demanding sustainable products however, they argue that without engaging retailers and their power of providing information to consumers, consumers would be unable to make educated choices or properly demonstrate their demand for those products:

“Canadian consumers are becoming increasingly aware of their impact on the planet and have become more inclined to buy products that are environmentally more sustainable, given the choice. But in an age where the deception of greenwashing proliferates and labelling still falls very short, the choice is rarely clear. Sustainable seafood is serious business and retailers have a role to play in providing Canadians with sustainable, fair and healthy seafood choices” (Greenpeace Canada, 2008a, p.4).

The same sentiments continue to be echoed throughout the Out of Stock campaign, with pressure being placed upon retailers by publically pinning them against each other based upon their sourcing of seafood, which can be seen in Figure 4.1 below:

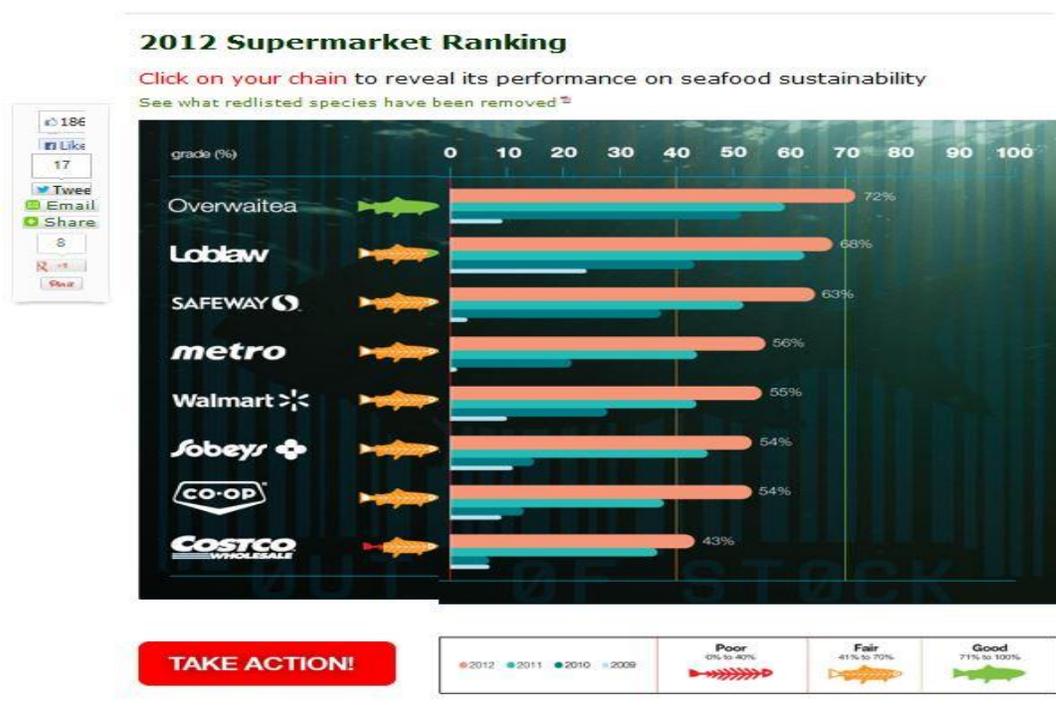


Figure 4.1 — Greenpeace Canada retailer report card ranking 2012 (Greenpeace Canada, 2012)

Within the Greenpeace campaign, similar to other ENGO campaigns, the consumer is also positioned as demanding sustainable seafood, but the exception here is that Greenpeace requires action by retailers in order for consumers to pursue that demand, as well as tackle consumer confusion:

“As consumers become evermore aware of sustainability and equitability, they learn that choosing green when it comes to seafood is not simple. Forced to navigate a sea of potential obstacles—including mislabelling, certification, conflicting information and health concerns—the need for the food retail sector to help ensure consumers only have responsible options is paramount” (Greenpeace Canada, 2011, p.3).

This campaign framed the consumer as dependent upon the action of the retailer. The informed consumer requires appropriate labelling, such as country of origin or method used to catch the seafood, in order to make an educated choice and cannot do that without the retailer providing the appropriate information. This campaign focus correlates with how Greenpeace as an

organization campaigns to create change, the direct targeting and public shaming of companies. The only act the consumer is asked to take is purchasing from stores which rate the highest according to the Out of Stock Retailer Report Card, essentially the ultimate threat to retailers with a low ranking.

Seachoice, a collaborative organization made up of several Canadian ENGOs (Canadian Parks and Wilderness Society, David Suzuki Foundation, Ecology Action Centre, Living Oceans Society, and Sierra Club BC) formed in 2006, and provides scientific based information for consumers on sustainable seafood. They present consumer demand as both currently active and growing: “Over the last several years, consumers have been demanding ‘green’ products and are actively supporting businesses that adopt environmentally responsible practices” (SeaChoice, 2011, p.4). Although they do not discuss consumer willingness to pay a price premium, they do highlight the importance and presence of consumer expectation in encouraging businesses to change their sourcing policies:

“The growing sector of eco-conscious consumers is expecting businesses to source ocean-friendly seafood. When a business publicly commits to a sustainable seafood policy, these customers will recognize these actions in sustainability leadership and will help support the commitment with their purchases” (SeaChoice, 2011, p.4).

This quote, taken from the Seachoice Business Guide, is targeting potential partners for the Seachoice program and framing the consumer as one which will financially support sustainability commitments by retailers. As an ENGO which gains exposure by partnering with different companies and displaying their rankings in stores, Seachoice directly benefits from framing the consumer as rewarding businesses for providing sustainable seafood.

Seachoice discusses how consumer demand has helped to shape the availability of sustainable seafood:

“Canadians have been helping to improve seafood labels by simply asking the following questions about their seafood and then voting with their wallets.....consumer power really works. Seafood retailers have started to listen, and grocery chains across Canada have been improving their seafood labels as they make the commitment to shift their supply to ocean-friendly seafood” (Gunnlaugson, 2012, p.1).

Seachoice is framing the role of the consumer as being very influential in persuading retailers to change their sourcing policies and is attributing the expansion of the sustainable seafood movement to the power of the consumer. They are reproducing the original idea behind the sustainable seafood movement, active consumer demand = market pressure for change, directly contradicting that this is an industry-led change. This representation falls in line with Seachoice's goal as an ENGO: “SeaChoice was created to help Canadian businesses and shoppers take an active role in supporting sustainable fisheries and aquaculture at all levels of the seafood supply chain” (Seachoice, 2013, p.1).

The David Suzuki Foundation, the first ENGO included in this study to discuss seafood issues in Canada, frames the consumer as powerful and active throughout their campaign. They are a solutions based ENGO, utilizing science to provide facts and present solutions of environmental issues to their supporters in simple ways. For example, they created a Suzuki top 10 Sustainable Seafood Picks List which provides information on 10 species which are safe to consume as well as sustainable, and most commonly found in Canadian grocery stores (David Suzuki Foundation, 2013). Although they are one of the ENGOs which forms Seachoice, they still have their own publications promoting sustainable seafood on their website as well as in their Annual reports and quarterly newsletter, Finding Solutions. This ENGO frequently discusses consumer power and speaks directly to their supporters about how they can make a difference with their purchasing choices:

“Consumers today are more educated and informed about environmental, health and food safety issues, and they are asking tougher questions” (Magera & Beaton, 2009, p.5)

And,

“This year more chefs, restaurant owners and grocery store managers attended the summit [international seafood summit] because of an interest in sustainable seafood. More people are asking retailers for sustainable options and businesses want to know how to meet their demands” (David Suzuki Foundation, 2011, p.3)

And,

“Choosing sustainable seafood is an easy and effective act of consumer power that helps protect our oceans and sends a strong signal to government and industry leaders that they should do the same” (David Suzuki Foundation, 2013, p.1).

Similar to other campaigns, the consumer is being framed as demanding sustainable seafood and also being encouraged to partake in the sustainable seafood movement by framing it as a simple and easy act which contributes to solving these issues. This follows with this ENGO’s brand of providing solutions to their supporters.

What this ENGO produced information illuminates is that the position of the consumer was still being portrayed as creating the demand and drive which fuels the sustainable seafood movement. These different campaigns represent the brands of different organizations and their ultimate objectives of addressing an important issue for their supporters. Some of the major critiques of the numerous ENGOs involved in the sustainable seafood movement have been the lack of one standard definition for what makes a seafood product sustainable as well as the numerous differences between campaigns. This is largely due to different ideas of what a sustainably managed stock is, promoted by different ENGOs, and through partnerships, retailers. In order to address this lack of standardization sixteen ENGOs from the USA and Canada formed the Conservation Alliance for Seafood Solutions in 2008. However, there is still the issue of competition between ENGOs for funding, which is considered to limit progress towards a consensus on sustainability standards (Schmidt, 2012). Ultimately, regardless of this Alliance,

each ENGO continues to promote their campaign and the consumer in a way which is reflective of their brand and also positions the consumer as demonstrating demand and a willingness to pay for sustainable seafood.

4.6 CONCLUSION

This Findings Chapter has summarized patterns which have been found in the collected data for Objective One of this thesis. It has demonstrated the change in the framing of the consumer being presented by the Marine Stewardship Council through statements made in their publically available information. The MSC has gone from utilizing the power of the consumer as central in their business model to stimulating consumer demand for sustainable seafood. This chapter then highlighted the ways that other ENGOs and retailers have continued to frame the consumer as either an active and influential participant in the seafood movement or a passive participant requiring education on sustainable seafood.

The reason why Retailers and ENGOs position the consumer differently is because although both groups of actors are involved in promoting the sustainable seafood movement, these two groups have different objectives when promoting their campaigns. Retailers are attempting to promote their CSR commitments to their consumers. This is why the retailer is the focal point of these campaigns, as well as to appease pressure from ENGOs. Whereas ENGOs are trying to engage consumers to get involved in the sustainable seafood movement and further promote their own campaigns. Each actor has chosen to position the consumer in a way which is reflective of their position and brand as an ENGO or retailer. In addition, and as has been addressed by Schmidt's (2012) research, these different actors choose to create unique consumer

focussed campaigns to stay competitive between each other in the marketplace. These different organizations are not presenting the consumer in a way which is reflective of current limited demonstrated willingness to pay a price premium for sustainable seafood potentially because these campaigns are being promoted for the sake of competition between actors for funding or support. This will be further demonstrated in the following findings chapter. Additionally, these partnerships have been presented in a highly positive light but as will be demonstrated in the following chapter, presenting an event ethnography at the Boston Seafood Show, the relationships between ENGOs and members of the seafood industry (e.g. retailers, suppliers, marketers) expose tensions because of the new found power which ENGOs have in market-based governance.

CHAPTER FIVE: FINDINGS PART TWO: OBSERVATIONS AT THE BOSTON SEAFOOD SHOW

5.1 INTRODUCTION

The International Boston Seafood Show, the largest annual business to business seafood tradeshow in North America, is an experience for the senses. Upon entering the Boston Convention Centre attendees, approximately 19,900 in 2013 (MSC, 2013c), might first notice the sheer size of the booths, some of which take up massive chunks of floor space and are constructed to take on the shape of large fishing boats. Some booths have private business lounges serving champagne in areas sectioned off by velvet ropes, while others have constructed second floors topped off with company flags and banners. The space is everything seafood industry related, with retailers, buyers, and sellers from around the world, as well as packaging and slicing machine distributors. The smell of fried seafood products fills the air as samples float about on silver trays being carried by smiling booth workers. The atmosphere is abuzz; almost everyone, it seems, is busy making connections that might generate potential deals or attract new clients.

The far back right corner of the large exhibition hall was where different ENGO booths were all grouped at the 2013 Boston Seafood Show¹. Many of them were promoting seafood certification, or consumer guides, and the importance of sustainable seafood generally. The imagery and wording presented at these ENGO booths, including the MSC, expressed the importance of the market and seafood industry in supporting sustainable seafood rather than

¹ Although ENGO were present at the Boston Seafood Show and did host conference sessions, their presentations focussed more upon providing explanations for the different programs and certifications that they had to offer rather than a discussion of consumer demand or the role of the consumer in the sustainable seafood movement. Therefore, the quotes used for this chapter more greatly reflect the opinions of retailers and seafood industry representatives from the show.

focussing upon the consumer, or their limited willingness to pay a price premium for sustainable seafood. Additionally, information collected from these booths further reflected this lack of mention of the consumer, and the focus was more placed upon the organizations themselves, what they do, and how they can contribute to solving our oceans crisis. However, this corner of the tradeshow floor was not the only place where sustainable seafood was being discussed. Many of the supplier booths across the entire tradeshow floor provided pamphlets and information about which sustainability standard(s) their product(s) met and often had certification symbols and key words (like e.g. sustainable, responsible, traceable, natural, wild and organic) prominently displayed under their logos.

Upstairs at the trade centre, conference-style sessions took place, often organized and/or hosted by particular groups of retailers, ENGOs, or industry associations. In 2013, sustainable seafood was the focus of 7 of 23 conference sessions, but also came up as a topic in other sessions as well. At these sessions, agreements and disagreements regarding sustainability (e.g. what it means and the different ways that it can be quantified and assured), sometimes became obvious as presenters discussed, debated, or at times, talked past one another².

It was clear at this event that even though roughly 20 years have passed since the emergence of the MSC, no single agreed-upon definition of sustainable seafood is held by actors within the seafood industry. Moreover disagreement over the role of consumers in improving the condition of fish stocks and marine ecosystems persists. I attended the 2013 International Boston Seafood Show to gather data to get a sense for the sorts of tensions, disagreements, and/or

² In addition to my participant observation at the 2013 seafood show, this chapter also draws on conference session recordings from the 2011 and 2012 Boston Seafood Show as well as from promotional materials (e.g. pamphlets) collected at the 2011, 2012 and 2013 shows.

challenges around the idea of sustainable seafood, and the future of certification in the industry, that were visible and/or being discussed by various actors.

Whereas Chapter Four demonstrated that relationships between ENGOs and retailers are often presented in a positive and engaging light, this chapter presents snapshots from a short but interaction heavy industry event where disagreements and tensions between different market actors were apparent. After exploring how consumers were being framed (or, perhaps, obscured) at the 2013 International Boston Seafood Show, tensions between actors, and what they mean relative to this research, will be illuminated through interactions and events observed that relate to three examples relevant to the sustainable seafood movement: controversy between the Marine Stewardship Council and the Alaska Seafood Marketing Initiative (ASMI); the formation of alternative forms of certification and labelling; and dissatisfaction of ENGO involvement in the seafood industry by retailers.

The examples suggest that ENGOs have gained new-found power through these governance partnerships, and as a result, there are a growing variety of visions for the future of the sustainable seafood movement held by central actors. The lack of consumer demand for sustainable seafood seems to have led to further tensions between ENGOs and the seafood industry as industry representatives, such as the ASMI, begin to question the benefit of recertification and paying logo licensing fees. Observations also indicate that as a variety of alternative third party sustainability certifications assurances increase within the seafood industry; new arguments for or against various standards will have to circulate. This has the potential to further politicize sustainable seafood both within the industry and amongst the general consuming public. Therefore, this chapter helps to confirm that the sustainable seafood movement is in Phase Two of Bernstein & Cashore's (2007) analytical framework for achieving

political legitimacy, pointing to the importance of this stage in influencing the future direction which the sustainable seafood movement takes in North America. This chapter also supports the third argument made in the introductory chapter of this thesis: **3.** The widespread adoption of the sustainable seafood movement by ENGOs and retailers has allowed for the formation of numerous sustainable seafood standards and alternatives.

5.2 FRAMING OF/ENGAGING WITH CONSUMERS

Discussions at the Boston Seafood Show explored how to further engage consumers, particularly strategies for retailers to establish a connection between the seafood department and the consumer while they are in the store. One of the main issues highlighted was a general lack in demand not only for sustainable seafood, but seafood in general. Amongst the ideas to increase demand was the use of sustainability certification as a way to engage consumers through stories of the people and places involved in producing seafood:

“It’s going to be about where it was caught. That then also gives us the opportunity to tell the story of where it was caught, tell the story about that geography. Engage the consumer, start to build trust. Here is where that product was caught, here is how it was caught, here are the methods that were used to catch that. Again engage the consumer, build trust with the consumer.”³

By establishing trust through stories of sustainability and direct engagement with the consumer at the seafood counter, it is their objective to increase sales and demand for seafood in retail stores.

³ A Senior Director of meat and seafood procurement at an American grocery retailer, 2013.

Supporting arguments made in Chapter Four, fear of competitors moving ahead in their sustainability commitments seems to have driven many businesses to support and promote their own sustainable seafood commitments (rather than reacting to consumer demand). One restaurant business owner described the reason they chose to get involved in sustainable seafood and set a high bar for their commitments:

“A bold goal of 100% of our seafood MSC certified, good or better choice on seafood watch or some other 3rd party telling us it was ok to serve. This was gonna happen with us or without us and we wanted to be a leader and not a follower, so we figured if we lead in our community then we would get press for it, and guests would choose to come to us before other restaurants and in the end we were motivated by trying to do the right thing as well as by profit.the issue of sustainability and responsible environmental stewardship is here to stay, so we figured lead follow or get out of the way.”⁴

As this quote explains, sustainability is seen as a good way to distinct your business model from your competitors, gain an increase in exposure and provide credit as a leader in the industry.

Many retailers in North America also communicated the idea that consumers, perhaps even beyond the wealthier and more educated segments, would demand sustainable seafood in the future. One example can be drawn from a conference session titled A Retailers Guide to Sustainable Seafood:

“Seafood is the most complicated product being sold by retailers but if done properly there are many good opportunities. These 22 companies all have purchasing policies now, harnessing the emerging consumer. We know now that this is not consumer led, that this push for sustainability is being led by industry which assess what is coming. But emerging consumers will get it and will hold us accountable...industry is leading right now but those consumers are going to catch up and they are going to hold us accountable for those decisions which we have made”⁵

⁴ Owner of an American seafood restaurant chain, 2012.

⁵ An independent consultant, 2012.

This lack of consumer demand could also be seen when discussing what consumers consider important when purchasing seafood at another panel session in 2012:

“I’m thinking its 5 or 10% of the population here that makes, that sustainability is part of their buying decision and it’s really the industry of course and the environmental community that’s driving these changes in improvements.”⁶

And also when discussing consumer trends in the retailing world in 2011:

“if you go across the country sustainability is not a big purchasing point for consumers.”⁷

What these quotes demonstrate is that some in the industry have acknowledged that there is no consumer demand for sustainable seafood currently. However, they also imply that consumer demand might change in the future; and in anticipation of that, proactive retailers will be ready and retain loyal consumers.

This section has illustrated that there is recognition within the seafood industry that the sustainability movement has not unfolded as originally anticipated, particularly with regards to the elusive price premium. However, it also demonstrates that a variety of other factors continue to incentivize retailers to pursue certified product and/or sustainability commitments. As the following three examples indicate, decisions about what certifications to employ and how commitments might change over time are obvious symptoms in phase two of Bernstein and Cashore’s (2007) analytical framework.

⁶ Editor of a seafood industry publication, 2012.

⁷ American seafood buyer, 2011.

5.3 ALASKA SEAFOOD MARKETING INSTITUTE AND THE MARINE STEWARDSHIP COUNCIL

One of the main reasons for attending the 2013 Boston Seafood Show was to further understand the discourse and tensions which were occurring between the different actors involved in the sustainable seafood movement. This section will focus upon the tensions which arose between the Alaska Seafood Marketing Institute (ASMI) and the MSC, an important partnership both because of its long history and because it involves two powerful groups within the sustainable seafood movement, the Alaska wild salmon fishers and processors, and the most popular wild stock seafood certifier in the world, the MSC. This example illustrates the characteristics of phase two of achieving political legitimacy from Bernstein & Cashore's analytical framework, and highlights specific problems which the ASMI has with MSC certification, as well as certifications role and place within the seafood industry. It also provides justification for the formation of alternative forms of certification, something which this thesis argues could alter the effectiveness of the sustainable seafood movement in leading to improvements in fisheries management.

As discussed in Chapter 2, the Alaska Seafood Marketing Institute announced that it would not be pursuing recertification to the MSC standard for its wild-harvest salmon fishery in the winter of 2012. This move was a surprise to many in the seafood industry (Foley & Hebert, 2013) and challenged the dominant position of the MSC as the standard of certification for wild-stock fish species. Indeed, Alaska salmon was amongst the first fisheries to gain MSC certification in 2000, and Alaska was a major supplier of fish to Walmart (Foley & Hebert, 2013). Because of the weight of this announcement, and the buzz it created in seafood industry

media, both ASMI and MSC were careful to assert and justify their positions on sustainable seafood at both the 2012 and 2013 Boston Seafood Shows.

Looking back to the 2012 tradeshow, and information gathered via recordings, (approximately two months after ASMI's announcement) a panel session entitled Making Sense of Sustainability through Positive Engagement, hosted by Global Trust, a FAO-based certification, reveals some of the criticisms that may have influenced the ASMI's decision. This panel session included a member of the ASMI, as well as a member of Global Trust, the FAO-based certification scheme which was to be the organization that would take-over independent fisheries management assessments. The session began with the moderator acknowledging that there was no representative of MSC present. The explanation was that the MSC was invited but as of the week before was not able to provide a representative.

Following this, a representative of the ASMI provided a speech which (without stating MSC) questioned the relevancy of MSC certification on several grounds. This representative provided a critique which started every sentence with 'it makes sense' followed by "it does not make sense." One statement made was that it does not make sense for there to be a lack of choice of certification for fisheries, which is a direct stab at MSC and their market dominance as a certification body. They went on to critique several aspects of private standard certification including: the cost of logo licensing, lack of inclusivity and the appropriate role a certification body should take:

"It does not make sense for a certification body to intrude onto the province of experience and lawful fisheries managers with their own ideas of what fisheries management should be."⁸

⁸ Representative of the Alaska Seafood Marketing Institute, 2012.

Additionally, they went on to discuss that suppliers and fisheries should not be worried about losing market access because they do not want to adhere to a private standard, nor should they have to deal with additional high costs found in the supply chain due to certification. Rather a certification process should be a transparent participatory process which utilizes global expertise, rather than the “self-serving promotion of private label standards”⁹.

This speech was a clear message of what the ASMI thinks about the state of certification options available, also stating that having more than one certification option on the market is important to the industry. Further, this speech was also a justification for their adoption and promotion of a different certification program. This is reflective of phase two of achieving political legitimacy because, as Bernstein & Cashore (2007) argue, phase two is when the creation of polarized communities, here being the support of different roles for certification in the seafood industry, begin to become more apparent and the divergence of standards occurs.

In 2013, the focal point of the Alaska Seafood Marketing Institute’s booth was the promotion of their catch phrase “Alaska Seafood: Wild, Natural, Sustainable.” They also included signs which stated “The FAO code is OUR code” proudly boasting their newly adopted FAO based certification scheme and “Our tradition of sustainability began half a century ago” making reference to the Alaska state constitution. Aware of the potential controversy the change in certification poses for the future of seafood certification and their business with certain parties committed to MSC sourcing, like Walmart, the booth also provided a plethora of information to address questions and concerns regarding their new form of certification and what these standards mean. One example would be their Guide to the FAO-based Responsible Fisheries Management (RFM) certification which includes FAQ:

“Are costs higher than other certification programs? No, in fact the FAO-based RFM certification avoid the licensing fees associated with some programs, lessening the

cost burden for all participants in the supply chain and ultimately, for the consumer” (ASMI, 2013, p.4).

This was one of the issues raised when the ASMI decided to drop MSC, because they did not wish to pay logo licensing fees to have the MSC logo on their products. Additionally walking around the tradeshow floor revealed that the same “Alaska Seafood: Wild, Natural, Sustainable” logo was found on several other booths selling Alaska seafood products. This is further demonstrative of the polarization of communities which occurs in phase two as more actors become involved in the movement and standards begin to diverge.

The MSC hosted its annual press conference titled MSC 2013 Update, at the show. While the meeting was not held solely in reaction to the ASMI decision (e.g. representatives updated the audience on newly certified fisheries), some of the most notable announcements included the reduction or removal of logo licensing fees, the dropping of logo licensing fees for small businesses, and future recertification fees would be reduced. Near the end of the meeting, the tone moved into a serious and heavy-hearted discussion about the importance of the relationship between MSC, Alaska, and the people who live there. The Regional Director commented:

“You know it's no secret that some in Alaska who would like to replace MSC, the program that's been developed there, um, we are a voluntary program and we have no issue at all with that choice. In fact it is the market that will decide that.”⁹

She continued by trying to convey the controversy from the MSC’s perspective:

“There is some misinformation out there about us. That we are acting as fisheries managers, dictating management and that certification costs millions of dollars. These things are just simply not true, and, um, we regret them and think that this is a discervice to the hardworking fishers, communities and processors and managers in Alaska..... So if anyone leads you to believe that MSC is not very much supportive

⁹ Regional Director for the Americas, MSC, 2013.

and in line with and respects or values the Alaska salmon fishery they're wrong, we do, we value that partnership and we appreciate their choice to work with us.”¹⁰

The MSC chose to very clearly and very publically explain their side of this story to ensure that there their stance on the matter is clear. Claiming that the market will decide if this new FAO based certification will be successful for Alaska could also connect to the commitments made by numerous retailers. For example, retailers who have committed to only purchasing MSC certified seafood would have to either alter their sourcing policies to purchase Alaska salmon or find an alternative source. However, with the case of Walmart in the US and their MSC only purchasing policy, loss of MSC certification led Walmart to alter their purchasing policy and continue to support the ASMI¹¹. In this case the market decided against the MSC.

5.4 ALTERNATIVES TO THE MSC

This section indicates some of the alternatives to the MSC discussed which emerged from panel discussions from the Boston Seafood Show. Similar to the previous section, they highlight some of the focal points of conversation for many actors when discussing the sustainable seafood movement and changes within it. These include Fisheries Improvement Projects, sustainable seafood committees for retailers and private labels for products. This section further supports the argument that the sustainable seafood movement is in Phase two of establishing political legitimacy for non-state market driven governance because of the adoption of different standards or certifications for sustainable seafood.

¹⁰ Regional Director for the Americas, MSC, 2013.

¹¹ Walmart announced after going to Alaska and seeing the standards which are being upheld, that they would consider altering their purchasing policy to continue selling Alaska salmon even though it was not MSC certified (Caldwell, 2014).

A prominent new example of business collaborations to create positive change in the seafood industry is Fisheries Improvement Projects (FIPs). These projects usually involve a private business financially supporting the improvement of a fishery so that they may improve their standards and potentially gain a level of certification in time. FIPs can also be part of retailer commitments to sustainable seafood as we have seen with Sobeys and their partnership with Sustainable Fisheries Partnerships (Sobeys, 2010). Seen as a more long-term commitment, FIPs are able to ensure the future extraction of that resource if sustainable management practices are achieved and can also prove to be a learning tool to apply to other fisheries. At the 2013 Boston Seafood Show, FIPs were being supported by large charitable organizations like the Clinton Global Initiative and large seafood businesses such as Darden restaurants which covers such powerful brands as Red Lobster and Olive Garden.

The Food Marketing Institute (FMI) creates programs for the retailing industry through collaboration with both suppliers and ENGOs. They have developed a Sustainable Seafood Committee which created different approaches to addressing issues which arise from sustainable seafood and developed tools to engage and attend to consumer needs. They also created a Sustainable Seafood Toolkit with guidelines for retailers to develop their own sustainable seafood programs. Although they do work collaboratively with ENGOs and suppliers, their memberships are exclusively for retailers and wholesalers. Another organization also led by industry collaboration, has been used as a bench marking tool to compare different certifications and labelling schemes around the world. These organizations are just a few of many which have arisen and can be reflective of the industry trying to create some standards to adhere to and to place more control upon their role in establishing and utilizing certifications for sustainable seafood rather than depending upon collaboration with ENGOs solely.

Alternative certifications are another way the industry has chosen to personalize their commitments to sustainable seafood and are also reflective of phase two of achieving political legitimacy. This divergence of standards can be seen with the previously mentioned example of Alaska Seafood Marketing Institute and their adoption of a new form of FAO based certification. In addition, on the tradeshow floor there were many different sustainability certifications and labels being presented for both wild and farmed seafood: Global G.A.P., MSC, ASC, B.A.P., OceanWise, Seachoice, NFI Crab Council Committed to Sustainability, Friends of the Sea... One example, as can be seen in Figure 5.1 below of a label is called Seafood Forever. Unsure of the meaning behind this label, I went to the company website and discovered that the label is called an emblem and was created by the company Aqua Star:

“At Aqua Star, we’re keenly aware that the future of our industry relies on the ability to develop, maintain and encourage sustainable practices. That is why we are actively involved with organizations such as the Marine Stewardship Council, Global Aquaculture Alliance – Best Aquaculture Practices, Ocean Trust and why we are setting our own operational standards with Seafood Forever™ “(Aquastar, 2011, p.2).

This is an “emblem” which the company created and is used to symbolize that they are committed to sustainability by placing it upon their products. Although they support the promotion of other certifications, they are still promoting their own emblem on their products in stores to symbolize their commitments, rather than relying on third party sustainability audits.



Figure 5.1 — Tradeshow Floor photograph of a private logo

5.5 TENSIONS THE INDUSTRY HAS EXPRESSED ABOUT ENGOS

Contradicting with the positive representations of the partnerships between ENGOS and retailers presented in Chapter Four, at Boston, there were numerous tensions being expressed by retailers, marketers and suppliers because of the roles which ENGOS are now able to play in the seafood industry. Bernstein & Cashore (2007) argue that agents and organizations, in this case that would include retailers, ENGOS and seafood industry buyers, marketers and processors, possess autonomy. As such, within a given structure, such as the structure of rules and definitions which will define the sustainable seafood movement, these agents and organizations can manipulate, compromise or choose a variety of strategies to have their needs succeed. The tensions exposed at Boston can be illustrative of this ongoing power struggle between these different actors to have their values and business need succeed over others. For example, common themes of tension arose amongst seafood industry representatives circulating around discussion of ENGOS as managers, contributing to consumer confusion, highlighting negative aspects of the seafood industry such as destructive practices and also pressuring retailers to gain certification or adopt sustainable seafood policies for their stores.

Some retailers also considered the role of the ENGO was to put them on the spot and shed light on the weaknesses in their sourcing policies, and to shame them into improvement. Joining partnerships or getting involved in sustainable seafood was seen as a way to avoid being targeted negatively in the media, and as one representative of an American grocery retailer explains:

“We knew a lot of NGOs were starting to really look at sustainable seafood, what retailers are doing at that time... We knew FMI was forming the sustainable working group, they asked us if we would like to join and we jumped at the chance, saying hey, this would be a good way to help protect ourselves from these NGOs.”¹²

Joining the FMI ensured that the retailer could state that they were working towards sustainable seafood commitments and this would shelter them from the public critique and shaming of different NGOs. This further highlights the important role that the NGO community has taken in furthering the sustainable seafood movement’s influence in the marketplace.

Looking more specifically at discussions of sustainability and the marketing of sustainable seafood, there was frustration being expressed by the industry in regards to how NGOs were presenting sustainable seafood to the public:

“There have been some changes if you look at the ways NGO’s approach these issues. Originally it was on sustainability and environmental issues and then they realized that this wasn’t resonating as strongly with American consumers as they thought so they kind of shifted over to this human health issue. And they very often will come out with negatives on human health because this is more important to the consumer. And it has more resonance with the consumer. I think most consumers are confused, there are so many eco-labels out there and there are so many conflicting messages and no clear direction and I find this problematic.”¹³

The industry was blaming the confusion around the consumption of safe seafood to be the fault of the variety of information being produced by NGOs. The tone of the discussion was not that of collaboration but of industry vs NGO, with industry having to invest in promoting alternative narratives than those being promoted by NGOs. Those alternative narratives include the promotion of positive aspects of seafood such as health, taste, texture and the stories which are connected to these products.

¹² Director of Meat and Seafood at an American grocery store, 2012.

¹³ Outreach Specialist with the National Aquaculture Association, 2012.

The same panel discussion exposed further tensions with ENGOs because the industry feels that these actors are out to promote their own interests and so are not looking out for the best interests of the seafood industry:

“They are promoting their brand. They have a brand to promote and it’s about donate now and that’s what it’s all about. It’s got nothing to do with saving lots of issues. It’s about donate now. Make my, make my NGO do the best. It’s not about our industry but it is a great opportunity for our industry....and I feel now that industry is taking control and I think that’s a wonderful thing.”¹⁴

The industry taking control was being described as further collaboration between stakeholders and an industry led promotion of positive messages about the seafood industry. They discussed that the ENGO community is very organized globally in getting messages out and this places the seafood industry at a disadvantage. They argued that it is through positive messages that consumers would be engaged and want to buy more seafood, thus increasing North American demand. These power struggles of controlling the messages of the seafood industry being reflected at Boston are illustrative of phase two where the formation of standards and definitions, and which I argue would also include the formation of overall messages about the sustainable seafood movement, begin to take hold.

5.6 SUMMARY OF OBSERVATIONS AND CONCLUSION

The ways retailers have framed sustainable seafood in the publically available documents collected in Objective One tell the story of a corporate world wishing to contribute to solving global environmental issues and do their part to ensure a future supply of seafood while also keeping in-step with their consumers demands for responsible and sustainable sourcing. ENGOs

¹⁴ Director of a Seafood Services Organization, 2012.

were considered to be the appropriate partner to provide the scientific information and support retailers needed to engage consumers and develop commitments. However, the picture being presented at the Boston Seafood Show exposes tensions between industry and ENGOs regarding the role of the environmental community, costs associated with certification, information overload (too many certifications and labelling schemes), and ENGOs as brands with their own interests to represent. More importantly, although the consumer has been presented as providing demand for sustainable seafood by many ENGOs, it was also brought up by some in the industry at the Boston Seafood Show that consumer demand was something which had not been currently demonstrated, but is assumed by some to be demonstrated in the future. This correlates with the changes which the MSC has made with their framing of the consumer as demand which now needs to be harnessed and stimulated.

What has also emerged has been a power struggle between ENGOs and industry with regards to how the issue of sustainable seafood and the seafood industry should be presented. Issues arise because of the use of different terminology which casts a negative light on the seafood industry, the use of sustainability as a misunderstood term, and the need to have more of a focus upon promoting product attributes that consumers regard higher than sustainability such as health, cost, and value. The industry is also trying to control the conversation on sustainable seafood by collaborating directly with fisheries, such as Fisheries Improvement Projects, and the previously mentioned formation of new certifications.

In addition, the development of the sustainable seafood movement has allowed for numerous alternatives to emerge for retailers and fisheries to choose from. This creates a variety of standards as well as commitments from a range in efficiency to all be labelled under the same title of sustainable seafood. There are many ENGOs promoting different programs for

sustainable seafood and numerous consumer guides using multiple definitions of sustainability, as well as several standards for certification, such as Fisheries Improvement Projects or the example given with the Alaska Seafood Marketing Institute and their FAO-based guidelines, described in Chapter Two. Each organization needs to provide something different to stand-out from the crowd and justify their existence as well as prove to their supporters that they wish to tackle this complex issue. Although some at the Boston Seafood Show representing the seafood industry argue that diversity of choice will be good for business, it also has the potential to dilute the influence of the ENGO community and provide labels to consumers which are not improving seafood sourcing or addressing the original issues which the sustainable seafood movement wishes to address, such as the example with Aqua Star and their Responsible Sourcing logo. These tensions and discussions of certification standards, consumer roles, and governance partnerships place the sustainable seafood movement in phase two of Bernstein & Cashore's (2007) analytical framework for achieving political legitimacy. This is thus an important time to reflect upon the sustainable seafood movement and the ways in which governance actors are presenting this movement because this could influence the direction the sustainable seafood movement takes in the future in North America.

CHAPTER SIX: DISCUSSION & CONCLUSION

6.1 SUMMARY OF FINDINGS

The main question of this research was: *how do large food retailers and environmental non-governmental organizations understand and publically communicate the role of seafood consumers in market-based sustainable seafood governance, and has this changed over time?*

The overview and discussion in this chapter summarizes findings and highlights the contributions of this research to current academic literature on market-based governance systems and the sustainable seafood movement specifically. Three main points will be argued: **1.** in the data, the consumer is presented as both active or as passive; **2.** the sustainable seafood movement has grown away from a basis in the power of consumer demand and instead has the potential to become a tool by powerful retailers through their market influence to promote seafood consumption and promote an image of that industry which is both sustainable and responsible; and, **3.** this widespread adoption of the sustainable seafood movement by ENGOs and retailers has allowed for the formation of numerous sustainable seafood standards and alternatives.

The data collected and analysed in this thesis has shown that ‘the sustainable seafood movement’ is an idea advanced largely by the ENGO community and advertised in an attempt to further engage and educate consumers about seafood that has been certified or assured by a third party as sustainable. Within ENGO and retailer produced promotional material, the consumer is most clearly presented in one of two ways: as an active participant in the sustainable seafood movement, making numerous claims towards every individual’s ability to “make a difference” and “vote with their wallet”, or alternatively, presenting the consumer as passive and positioning the retailer and their commitments as central to advancing environmental improvement. With the

exception of the Marine Stewardship Council, there was no temporal change in how the consumer was being communicated throughout these campaigns despite evidence that consumer demand for sustainable seafood does not exist in North America (Eden, 2011; Gulbrandsen, 2006; Roheim; 2009).

The sustainable seafood movement has grown away from a basis in the power of consumer demand and instead has become a tool by powerful retailers through their market influence, to promote seafood consumption and promote an image of that industry which is both sustainable and responsible. The widespread adoption of the sustainable seafood movement by ENGOs and retailers has allowed for the formation of numerous sustainable seafood standards and alternatives. These alternatives include new certifications, private labels and Fisheries Improvement Projects. Together, these findings call into question the current effectiveness of the sustainable seafood movement because retailers retain more power relative to ENGOs in that they can choose these less effective alternatives as chosen solutions.

Additionally, information collected at the Boston Seafood Show, as well as industry news sources presented in Chapter Four and Five, revealed that there was an assumption by some retailers, Loblaws, and seafood marketers that consumer willingness to pay for sustainable seafood, which has been demonstrated in some limited urban marketplaces in Europe, would be demonstrated in the future. Therefore anticipating the concerns of their consumer base would place retailers at an advantage over their competitors. This anticipation of concerns is also reflected in the temporal change of the communication of the consumer by the MSC. However, tensions at the Boston Seafood Show also arose between representatives of the seafood industry and the ENGO community because many, such as retailers and fisheries, felt pressured to attain

certification from the ENGO community and also to continue to gain market access for their products.

By presenting the consumer in an active position, the information collected from these campaigns supports an active boycotting movement and attempts to engage the consumer in its underlying tenet; the collective action of each individual's purchasing choices could directly contribute to solving this "looming crisis" (Hebert, 2010, p. 554; Silver & Hawkins, in review). Even without consumer demand, by presenting the retailer as central in making change, retailers were able to promote their commitments to their consumers, advertise their private labels and reposition themselves as part of the solution as well as an educator to consumers about sustainable seafood, ultimately attempting to establish trust with their consumer base and stimulate consumer loyalty.

6.2 DISCUSSION

This section will place the data collected for this research into current academic literature on environmental governance and the sustainable seafood movement. More specifically this section will strengthen my argument by supporting the presented findings with a small but growing body of literature currently available exploring the interactions between different governance actors in the sustainable seafood movement in North America. Following with the structure of Chapter Two Literature Review, this section is organized by looking at research conducted on each or several of the following actors: the consumer, the retailer and the ENGO. In addition the sustainable seafood movement itself will also be discussed and finally, this

information will be placed into Bernstein & Cashore's analytical framework for achieving political legitimacy for non-state market driven governance.

The discussion will highlight several findings associated with the different actors involved in the sustainable seafood movement. For instance, consumers are being engaged on an individual level and I will argue that they have been presented as a contributor to the sustainable seafood movement by ENGOs and retailers to further encourage them to purchase sustainably certified products (Carrier, 2010). ENGOs have utilized their power of naming and shaming of companies to get them involved in promoting commitments to provide sustainable seafood options to their consumers (Gulbrandsen, 2006). This can be reflected in the use of defensive language from seafood industry representatives at the Boston Seafood Tradeshow when discussing reasons for producing sustainable seafood commitments. The promotion of private labels brands is one way which retailers are able to stay competitive (Ailawadi & Keller, 2004). In addition, I will argue that retailers are utilizing the sustainable seafood movement to further promote their own private label brands. For example, Sobeys came out with a traceability system for their seafood products, however the only way to utilize this system originally was through purchasing their Sensations by Compliments private label brand products (Sobeys, 2011). After discussing environmental governance and the discourse being produced in the north American sustainable seafood movement, this section will argue that this movement is in Phase two of Bernstein & Cashore's (2007) analytical framework which demonstrates an important phase in which the future of the movement and standards it will adhere to begin to take form.

Carrier (2010) argues that ethical consumption can achieve two things for individuals. First, at a personal level, individuals may feel that ethical consumption, including purchasing certified sustainable products, helps them to lead more morally just lives. Second, at a public

level, individuals feel that they are part of a larger collective using their purchasing power to positively affect the world and place pressure upon companies to sell responsibly or sustainably sourced products. Ethical consumption then becomes an individualized solution to larger and collective environmental and social issues. The ways that the consumer has been framed as a contributor to the sustainable seafood movement suggests that ENGOs and retailers seek to tap into these personal collective motivations and sentiments.

Alternatively, Ailawadi & Keller (2004) present the proliferation of certifications and private labels as indicators of both growing retailer power as well as increased competition between retailers and discount or warehouse stores. Because a large portion of retail sales come from manufactured products which are also sold by competitors, the formation of private labels allows retailers to differentiate themselves from their competitors and can increase their profitability. Building upon this, because of such intense competition between retailers, the sustainable seafood movement proves to be a great opportunity for retailers to differentiate themselves from their competitors, allows them an opportunity to promote their private label brands, as seen with the previously mentioned example of Sobeys, appease pressure from ENGOs, and demonstrate a strong environmentally conscious brand to their consumer base (Roheim, 2008). This hypothesis provides several reasons why retailers have so willingly adopted and persisted with sustainable seafood commitments regardless of a lack of demonstrated consumer demand to pay a price premium for sustainable seafood currently.

Schmidt's (2012) research explored sustainable seafood governance partnerships and demonstrated that all major Canadian retailers have partnered with ENGOs and produced different sustainable seafood commitments to both promote their CSR and stay competitive in the cut-throat Canadian retailing market (Schmidt, 2012). In addition, my research argues that

retailers are utilizing the sustainable seafood movement as a means to promote their own private label brands and present their brand image as sustainable and responsible to the consumer. This becomes a market advantage for the retailer as they are able to attempt to establish a relationship of trust between the consumer and the retailer based upon the promotion of sustainable seafood. The retailer provides the information, supported by partnerships with reputable ENGOs, and the consumer trusts that the research has been done for them and their purchasing choice is making a positive impact. However, because of the numerous private logos and alternative forms of certification, retailers as well as private companies are at an advantage and can easily choose standards which are not as effective as others, but are still considered to be “sustainable”.

The ways that the Marine Stewardship Council, considered to be the top sustainable seafood certification standard in the industry (Foley, 2012; Ponte, 2012), frames the consumer role has changed over time. Originally presenting the consumer as providing the power needed to change the industry through market based governance, the MSC now discusses the consumer as an actor whose choices need to be influenced to further move the sustainable seafood movement forward. This has been demonstrated in the publically available documents collected by the MSC: In 2001 the consumer was presented as providing demand to incentivize fisheries to gain certification, but from 2007 to now, the MSC repositioned the consumer and they are now being influenced by the MSC (MSC, 2001; MSC, 2008). The MSC, although highly praised, has also been highly criticized in the past for its governance structure, lack of certification in the developing world, its lengthy certification process, cost of certification, certification of questionable wild fish stocks and its monopolization of the sustainable seafood certification market (Christian et al., 2013; Foley, 2012; Foley & Hebert, 2013; Froese & Proelss, 2012; Ponte, 2012). This finding suggests that this ENGO has reacted to these numerous criticisms and

acknowledged the limited role the consumer plays in the sustainable seafood movement to avoid scrutiny from other governance actors about the lack of demonstrated consumer demand for sustainable seafood currently. The example of MSC's conflict with ASMI and the proliferation of alternative labels and options suggest that MSC will continue to have to work hard to maintain its position within the seafood governance network.

Gulbrandsen (2006) argues that it was not the actual buying power that consumers provided which mattered in promoting the sustainable seafood movement but the power of ENGOs to name and shame companies and place pressure upon them to change their sourcing policies. This is reflected in the data which was gathered at the Boston Seafood Show which included comments from panel sessions describing the need for retailers to protect themselves from ENGOs and so chose to develop commitments for sustainable seafood for their stores.

Specifically, the panel sessions at the Boston Seafood tradeshow presented various tensions surrounding negative messages being produced about the industry, ENGO-retailer partnerships and the role of certification in influencing management strategies of the industry. These exposed tensions provided great insight into the power struggles occurring within the sustainable seafood movement and the numerous alternatives which have arisen to meet the growing demand for sustainable seafood by the seafood industry. This information reflects a snapshot in time of how the seafood industry is adapting to/incorporating the sustainable seafood movement into their business practices.

What these tensions illustrate is that although many in the seafood industry are working hard towards developing agreed upon standards for the retailing world for their sustainable seafood campaigns, such as the Food Marketing Institute, there is also resistance from the seafood industry towards the ENGO community. At least some in the fishing industry feel forced

pressure to adopt sustainability credentials to attain market access for their products. Because of this pressure, and because there is often not enough sustainable seafood to meet retailer commitments for sustainable seafood, alternative certifications and labels have emerged. This then allows for further diversity within these sustainable seafood campaigns and retail commitments. However, due to a lack of standard for what is considered sustainable seafood amongst these campaigns, these new alternative standards and certifications are all being labelled as sustainable regardless of the level of sustainability those products represent.

Environmental governance has created a power shift away from a traditional focus on managing fish stocks and instead places focus on standards of sustainability (Foley & Hebert, 2013). This shift has important implications for the fishing industry such as threats of marginalization from an environmental decision-making process. This was reflected in the tensions exposed at the Boston Seafood Show, and more specifically with the ASMI and their anger over not wanting to keep MSC certification of their salmon. For example, they expressed frustration because they felt that it was not MSC's place to become involved in the management of their fish stocks. Fisheries Improvement Projects, which have emerged as a strong alternative in the last 3 years, offer almost the opposite model, whereby participating firms in partnership with ENGOs decide what sort of improvement project they would like to sponsor and how much to spend doing so.

Silver & Hawkins (in review) argue that the reproduction of the sustainable seafood movement obscures the ecological and management complexities of industrial fishing. This has also been reflected in the documents collected for this research. Similar to Silver & Hawkins (in review) analysis of representations of the sustainable seafood movement, relationships between ENGOs and retailers were also presented as positive and easy to become engaged with. They

were structured to present a problem, overfishing, and an easy solution to that problem, the consumer and their ability to create change through their purchasing choices. The similarities between my research findings and those of Silver & Hawkins (in review) strengthen the validity of my analysis of the sustainable seafood movement. However, my collected data adds to this portrayal of consumption and argues that retailers studied for this research are utilizing the sustainable seafood movement to promote themselves as the solution, rather than the consumer, which allows them to present their brand in a positive light.

6.3 APPLICATION OF ANALYTICAL FRAMEWORK TO SUSTAINABLE SEAFOOD MOVEMENT

According to Bernstein & Cashore's (2007) analytical framework for achieving political legitimacy phase two of three is when idea exchange, tensions, and established agreed upon standards for market-based governance begin to emerge. As this research has presented, these traits can be reflected in the ethnographic snapshot of the Boston Seafood Show as well as the information presented in the first Findings Chapter. This phase is the current state of the sustainable seafood movement, where alternative certifications, labelling schemes, standards and arguments over legitimacy of different actors (ENGOs and consumers) have become apparent. This signifies an important stage in the development of the sustainable seafood movement in North America because it demonstrates that the standards which come about within this current phase may push the industry towards phase three of political legitimacy, where "the acceptance of shared rule by a community" occurs (Bernstein & Cashore, 2007, p.348). However, there are no guarantees that this will happen or that any sustainability standards eventually agreed-upon will effectively ensure environmentally sustainable fisheries. It is important to note that political

legitimacy might actually address one of the large barriers consumers currently face when it comes to buying sustainable seafood: consumer confusion. If agreed upon standards were internally accepted, then it would in theory be easier to establish standardized information for consumers.

6.4 THEORETICAL IMPLICATIONS/SIGNIFICANCE

A large amount of governance literature exploring the use of market-based mechanisms has focussed upon one aspect of these complex governance landscapes such as individual certifications, contrasting the use of different consumer guides, or exploring consumer willingness to pay a price premium (Eden, 2011; Gulbrandsen, 2006; Roheim, 2009). But there is a gap in the literature which does not consider the complex interactions between governance actors and how those interactions will shape the still evolving sustainable seafood movement into the future. This study is unique because it is exploring how two large and influential governance actors, ENGOs and retailer's, are publically communicating the role of the consumer as they respond to changing political and economic conditions around fisheries and consumer response to certified fish options on the shelf. It sheds light upon the power which each of these actors holds in the promotion and shaping of the sustainable seafood movement and reveals that the governance system will likely persist in some form with or without broad based consumer willingness to pay more for certified product. This calls into question basic definitions of 'market-based environmental governance' that directly link public calls for more sustainable production to price incentives for retailers and producers (Lemos and Agrawal, 2006).

Ultimately what Bernstein & Cashore (2007) illustrated with their framework for achieving Political Legitimacy was that although environmental governance is often simplified and presented as clean organized exchanges between numerous actors across market space, the reality is significantly more complicated. Arguments, power struggles and tensions have arisen within the sustainable seafood movement because this new-found collaboration between actors is still young and developing. Additionally not all actors have the same end goal: ENGOs wish to encourage more environmentally friendly practices; retailers want to draw consumers into their establishments, encourage the purchase of a wide variety of food products, and ensure that they develop loyal customers over time; consumers are influenced by a variety of emotions and variables and often consider value, cost, and health as more important than sustainability.

Therefore, we also see that not all actors are given equal power in creating change within these market-based governance systems. Because of the lack of demonstrated demand by consumers, including a lack of responsiveness to retailer campaigns for sustainable seafood, and the addition of alternative sustainable seafood labelling, this places the retailer in a position of power to reduce the effectiveness of their sustainable seafood campaigns without any loss of consumer support. Unless ENGOs band together and establish agreed upon standards for sustainable seafood commitments, which has been argued as unlikely because of competition for funding (Schmidt, 2013), they will continue to add the diversity of campaigns and options for retailers to choose from.

Attending a live industry event allowed the opportunity to highlight the tensions and strengths in these relationships. This is invaluable to the study of environmental governance because the complexity, politics and social tensions of 'market-based' environmental governance is further revealed. What this research method is able to achieve is highlight where problems are

arising, which could allow for the production of solutions to address these issues in the future. It is imperative to understand these different actors as well as the interactions between them to truly grasp market-based environmental governance and its feasibility in addressing such immense global environmental problems.

6.5 LIMITATIONS

One of the limitations to this research has been the short temporal span of data available from Canadian ENGOs and retailers regarding the sustainable seafood movement. Although data collected from the UK, where sustainable seafood commitments from retailers came about in the late 1990s, would have provided more temporal information to analyze if there had been changes in how the consumer was being communicated, that study area would not have provided insight into how the consumer was being communicated in an area where there was no demonstrated consumer willingness to pay a price premium for sustainable seafood like in North America.

Moreover, this research did not gather data from consumers specifically, and therefore, cannot speak to the complexities of consumer confusion regarding the certification landscape or of what influences their seafood purchasing decisions. This knowledge would have added further insight into the current ways consumers have responded to the sustainable seafood movement and if they got involved because of added knowledge about sustainable seafood or simply because the sustainable alternative option was provided to them by their retailer.

6.6 FUTURE RESEARCH SUGGESTED FROM RESULTS

The focal point of this research is not an assessment of the effectiveness of certification in solving issues of mismanagement of fisheries, but it is still important to discuss that the purpose of sustainable seafood certification is to fill in the gaps which have been created by government mismanagement. What was not being addressed by the data collected on the sustainable seafood movement was how the government could also be involved in directing improvements in sustainable seafood and also ensuring some continuity in the messages being presented to Canadians about sustainable seafood such as what should be considered sustainable for consumers? There has been little to no mention of government collaboration with other actors in the sustainable seafood movement from the data collected and their presence at the Boston Seafood Show conference sessions on sustainable seafood was minimal. However the findings have also shed light upon how some states, such as the state of Alaska, have established their own eco-labels for sustainable seafood. Exploring this changing role of the state in market-based environmental governance would prove to be a useful study for future research in Canada.

Because the aim of this research was to explore how consumers were being represented in publically available documents, interviews with members of the ENGOs and retailers included in the study were not considered. However, future recommended research could explore what the representatives of these organizations think about consumer demand for sustainable seafood and how they feel it has been adopted by their consumer base. For example, in stores where they distribute consumer pocket guides how many consumers are taking them and of those consumers, how many have used them in their stores. Additionally, looking at retailer programs which include traceability, how often do consumers utilize those programs, and has this changed since their introduction? This type of research could shed light onto how consumers are reacting

to sustainable seafood commitments by their retailers specifically in Canada. This would offer governance literature on the sustainable seafood movement further insight into the role that the average Canadian consumer identifies with and if this is reflective of current limited willingness to pay realities.

6.7 CONCLUSION

This thesis has explored the sustainable seafood movement, the actors within it, and the ways in which influential governance actors, retailers and ENGOs, publically communicate the role of the consumer. It has also demonstrated that although the sustainable seafood movement is being promoted in a positive light, publically available documents produced by retailers and ENGOs do not convey the lack of demonstrated willingness to pay for sustainable seafood by consumers, the power struggles which exist between these actors and the tensions which have arisen between ENGOs and the seafood industry. What the communication of the consumer role supports is that the consumer's ability to provide change for sustainable seafood currently is insufficient, and so consumers are being promoted as demanding sustainable seafood by ENGOs to engage them to partake in this boycotting movement. Additionally, assumed consumer demand in the future, as demonstrated by demand in European countries, could be one of the many reasons why retailers have committed to promoting the sustainable seafood movement.

The promotion of the sustainable seafood movement has been invaluable to further spreading the conversation of sustainable seafood throughout the seafood market and grocery retailing world in North America. This movement has also highlighted oceans issues and presented these issues to consumers. However, because the power between these different

governance actors is not evenly distributed, and retailers are placed at a great advantage with the choices available to them, this could lead to the sustainable seafood movements effectiveness in creating change on the water reduced, and potentially make this movement a promotional opportunity for the seafood industry and a greenwashing opportunity for retailers in North America.

There is great concern in popular media as well as the academic community for the future of wild stock fisheries and ocean health. The immense task of solving this crisis is one which requires collaboration between nations, international organizations and, now with the widespread adoption of environmental governance, the marketplace. Bernstein & Cashore (2007) argued that market-based governance has some potential to help address international environmental woes because it is not dependent upon the slow moving state system and can address these issues directly through the use of the international marketplace. However, achieving political legitimacy does not imply achieving the best environmentally sound management practices. Rather it is a compromise between all actors involved. Exploring the power dynamics between these different actors exposes who has the greatest amount of power, and therefore potentially the most leverage in shaping what political legitimacy will look like for market-based environmental governance in the future. Because of such potential momentum to create positive change and address what has been presented as an environmental issue of monumental proportions, the sustainable seafood movement, the actors within it and their relationships need to be further understood.

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APPENDIX A

Table of Canadian ENGO and Retailer Partnerships for sustainable seafood (Schmidt, 2012)

Retailer (in order of policy announcements)	Key NGO Partner(s)	Policy	Target Date
Loblaws	WWF Canada	Wild: Source from MSC-certified or equivalent ¹ Farmed: Source from ASC-certified or equivalent ¹ Tuna: Source from ISSF members ¹	2013
Overwaitea Food Group	SeaChoice	Eliminate all red list and SeaChoice 'Avoid' products while increasing 'Best Choices' options ^{2,3(1)}	2015
Federated Co-ops	SeaChoice	Eliminate all red list and SeaChoice 'Avoid' products while increasing 'Best Choices' options ^{2,3}	None
Walmart Canada	SFP	Wild: Source from MSC-certified or equivalent ² Farmed: Source from ASC, BAP certified or equivalent ² Tuna: Source from ISSF members ³	2013
Metro	None	Withdraw or continuously improve at-risk species Favour suppliers that demonstrate improvement (e.g. MSC certification) ^{2,3}	None
Costco Canada	WWF US (through parent company)	Wild: Increase MSC or equivalent products ² Farmed: Source from ASC-certified or equivalent ² Tuna: Source from ISSF members ³⁽²⁾	None
Marketplace IGA	Ocean Wise	Offer Ocean Wise labelled products ^{2,3}	None
Sobeys	SFP	Delist problem fisheries unless they commit to a FIP. Endorse MSC, ASC or BAP products ^{2,3}	2013
Thrifty Foods	Ocean Wise	Offer Ocean Wise labelled products ^{2,3}	None
Canada Safeway	SeaChoice	Farmed: Source BAP-certified ² Eliminate SeaChoice 'Avoid' category ^{2,3} Encourage FIPs	2015

APPENDIX B

Information on research for tradeshow attendees interested to learn more about this project



COLLEGE OF SOCIAL AND APPLIED HUMAN SCIENCES
Department of Geography

March 2013

Hello,

My name is Isabella and I am a graduate student in the Department of Geography at the University of Guelph in Ontario, Canada. My thesis research seeks to understand how retailers and environmental non-governmental organizations understand and discuss the role of consumers in the 'sustainable seafood movement'. I am attending the Boston Seafood Show to gain an insider's perspective into the seafood industry and see how sustainability and consumers are being represented in this space. I will gather pamphlets from the booths on the tradeshow floor, and where there are displays about sustainability, photograph them. This research has received ethics approval at my University, and according to these guidelines, any photos containing people will either have the people cropped out or will not be used in the presentation of the research findings. If you have any questions about how this information will be used, feel free to contact me at isulpizi@uoguelph.ca or my research supervisor at j.silver@uoguelph.ca (see her full contact details below).

Sincerely, Isabella Sulpizio

Research supervisor:
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APPENDIX C

List of Conference Sessions at the 2013 Boston Seafood Show.

Conferences attended are highlighted in bold font.

Sunday March 10th, 2013

- Independents Day
- National Fisheries Institute Presents: Options in Documenting Product Distribution
- **Species Forum on Tuna**
- **Combating Seafood Substitution and Mislabelling: Facts, Fictions and Initiatives**
- Waste Not! Extracting Value from the Seafood Processing Waste Stream Through the Development of By-products
- **Brand That Fish! How to Distinguish Your Seafood Products and Services in a Crowded Marketplace**
- Boost Profits with Accurate Recipe Cost and Product Engineering
- NOAA Interdepartmental Panel Discussion: Species Substitution, Mislabelling & Fraud
- Values-Based Sourcing: How to Insure Integrity
- How the Gulf States can Help You Sell More Seafood
- Convergence of Seafood Traceability and Species Identify Technologies—the Arrival of the New Frontier
- National Fisheries Institute Presents: Debunking the Risk Myths: Seafood's Success Story

Monday March 11th, 2013

- Mini-GOAL: Delivering Responsible Aquaculture to the Marketplace
- **Catalyzing Industry to Rebuild Fisheries: Fostering Multi-Stakeholder Collaborations via the Clinton Global Initiative**
- Killer Demos and Successful Merchandizing
- Keynote Presentation: Leapfrogging to Breakthrough Innovation
- New Product Development for a Mid-size Restaurant Chain: Challenges and Opportunities from a Chef's Perspective.
- Seafood Business Summit: M&A and Strategic Opportunities in Seafood
- **Seafood Sustainability in the Developing World: Our Interconnected Industry and What it Means for Your Business**
- **What the Industry Experts say: Perceptions of Sustainable Seafood Production and Marketing**
- **Retail Forum: Retail Seafood 2020. What Supermarket Seafood Departments will Look Like by the Start of the Next Decade**
- Seafood Safety and Compliance with FDA and CBP Regulations as Implemented by the Food Safety Modernization Act

Tuesday March 12th, 2013

- **Entering and Thriving in an Era of High Food Prices and High Costs**

APPENDIX D

Meaning of Nodes

NOTE: All documents were coded as either ENGO or Retailer produced, then coded for the organization that produced them and the year of publication.

Activism for change: This node was created to code any form of action which consumers are encouraged to take by these campaigns other than purchasing products.

Active vs Passive Consumer: These two nodes were used to highlight the contrast between how retailers and ENGOs discussed the consumer in their promotional campaigns.

Certification: This node was used to organize data which describes the use of and emergence of certification as a form of environmental market-based governance. It was used to aid in the literature review portion of this thesis.

Chef: This node was created to highlight when chefs and the power of chef celebrity or menu creating in changing the demand and promotion of sustainable seafood. This node came about because of the frequent use of chefs in many of the sustainable seafood promotional material.

Confidence in eco-label: This node was used to indicate if the consumer was being discussed as supporting a specific certification or ecolabel.

Consumer: This was the main code used throughout all of the documents in this research and is looking at the ways in which the consumer is being communicated. Any reference of consumer was coded and later analyzed and further coded to organize the information.

Consumer confusion: This node was used to draw out any mention of consumer confusion towards sustainable seafood. Often this confusion was seen as a barrier to creating effective consumer demand.

Consumer Guide or Certification (use of): This node was used to highlight when consumers used certification or consumer guides as a means to influence their purchasing decisions.

Consumer Influenced by ENGO/Retailer/Government: Many of the mentions of consumers had been around consumers needing to be educated so these three nodes were used to divide consumers being influenced by retailers, the government and ENGO information.

Consumer Preference for a better environment: This node highlighted when there was specific mention of consumers who want to make green purchases and acknowledge the effects their purchases can have.

Consumerism for change: This node was used to describe when the consumer was being discussed as creating change in the seafood industry through their purchasing decisions. Ultimately it used in contrast to the previous node Activism for Change.

Consumption as individualistic: There are numerous reasons as to why consumers choose to purchase one product over another. Because of this, any mention of purchasing seafood that is not an environmental one but more a personal preference has been coded under this node.

Cultural Consumption: At the Boston Seafood Show there was a lot of information with specific reference to cultural reasons for eating seafood and this node highlighted those specifically mentioned reasons. This is not heavily mentioned in the data.

Demand: This was a very common theme in this data and so any mention of consumer demand was highlighted to help describe if the industry considered this to be a factor in sustainable seafood governance.

Education level or access to information as factor: There were numerous references to level of education as a factor in consumer awareness and also the ability to gain access to information on green products.

Financial constraints to eco purchasing: Being able to change the market via voting with your wallet limits the voices of the people who are unable to afford to vote with their wallets as they wish they could. This highlighted any mention of financial barriers.

Governance stakeholders: Often times there is mention of who the stakeholders are for sustainable seafood, sometimes the consumer is mentioned as a stakeholder and other times it is people along the supply chain instead.

Government as actor or use of government processes: Used both as a further code for activism for change but also as a way of highlighting the role that the government plays in the governance of sustainable seafood. This is important to highlight because it is so briefly mentioned throughout the data yet is an important part of the management of commons resources.

Health as a main factor for eco purchasing: Health was often referenced as a major reason why people choose to purchase seafood and so it was important to understand how prevalent health was in the data.

In-store campaign: If the sustainable seafood campaign concentrates its efforts to educating people in the store than this is one way the consumer is seen gaining information.

No consumers: This node was used when governance stakeholders were being mentioned and the consumer was not listed as one of them. This was an important finding because it demonstrated that the consumer was not considered to be as influential actor of an actor as others.

Out of store campaign: This node was used when a campaign was being concentrated online or in advertising as a means of communicating the information to the public rather than focussing upon in-store or in-case promotional materials.

Willingness to pay: This node was used to determine how often mention was being made specifically towards consumer willingness to pay for sustainably certified seafood.