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The Sustainable Seafood Movement Is a Governance Concert, with the Audience Playing a Key Role

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Abstract: Private standards, including ecolabels, have been posed as a governance solution for the global fisheries crisis. The conventional logic is that ecolabels meet consumer demand for certified “sustainable” seafood, with “good” players rewarded with price premiums or market share and “bad” players punished by reduced sales. Empirically, however, in the markets where ecolabeling has taken hold, retailers and brands—rather than consumers—are demanding sustainable sourcing, to build and protect their reputation. The aim of this paper is to devise a more accurate logic for understanding the sustainable seafood movement, using a qualitative literature review and reflection on our previous research. We find that replacing the consumer-driven logic with a retailer/brand-driven logic does not go far enough in making research into the sustainable seafood movement more useful. Governance is a “concert” and cannot be adequately explained through individual actor groups. We propose a new logic going beyond consumer- or retailer/brand-driven models, and call on researchers to build on the partial pictures given by studies on prices and willingness-to-pay, investigating more fully the motivations of actors in the sustainable seafood movement, and considering audience beyond the direct consumption of the product in question.

Keywords: corporate social responsibility; ecolabels; ethical consumption; green marketing; supply chain management; sustainable seafood

1. Introduction

With seafood being the most highly traded food globally and per capita consumption increasing more rapidly than other animal proteins, wild capture fisheries face real and imminent environmental limits. According to widely cited FAO reports, harvest rates have stagnated over the last two and a half decades and the number of fish stocks fully exploited or overexploited has progressively increased [1].

In the past, calls for better management of the oceans generally only involved the catching sector and governments, but recently more widely recognised scarcity in the supplies of some species, driven by overfishing, is being scrutinised by a wider audience [2]. There is now a global discourse on seafood sustainability that is the focal point of environmental non-government organization (ENGO) campaigns, supply chain procurement decisions, (inter-) governmental management strategies, and consumer decision-making. New innovative governance arrangements—often centred around market transactions—are emerging that involve governments, markets, fishers and aquaculture producers, ENGO and media actors, as well as consumers, in what is commonly referred to as the sustainable seafood movement [3–5]. Aquaculture is part of this discourse, and indeed as an alternative source of supply is often a part of the solution for the overfishing problem. Aquaculture has its own set of sustainability concerns including pollution from feed and waste and escapes of aquaculture animals

into wild populations [6]. More generally, in food production, sustainability concerns include carbon footprint, other types of pollution, and the materials used in packaging. For manageability, in this paper, the scope is limited to overfishing and therefore, wild capture fisheries.

There is not yet clear evidence that the sustainable seafood movement in the form of ecolabels has effectively reduced overfishing. Marine Stewardship Council (MSC)-certified fisheries have been found to be less likely to be doing harmful fishing than non-MSC-certified fisheries [7]. On the other hand, there are other studies pointing to the failings of seafood ecolabels [8]. Overfished stocks and fisheries without suitable data for determining overfishing are certified as sustainable by prominent ecolabels [9]. The MSC system for dealing with information challenging certification appears to have serious flaws [10]. Ecolabels do not deal with important ecological impacts from fishing, such as fuel use, pollution from anti-fouling agents, and post-harvest processes [11]. MSC certification has been found to encourage collective action to promote sustainability, but on the other hand has also been found to be difficult for smaller scale and developing country operations to access due to the expense and nature of reporting required [12]. While the direct effect of ecolabels on fisheries certified is not clearly positive, ecolabels are now an established feature of many seafood markets and seem likely to remain so in the short- to medium-term. It is therefore important to keep researching the sustainable seafood movement to better understand its potentials and limitations.

Since it emerged in the late 1990s, the sustainable seafood movement has been characterised by constellations of actors tackling issues of sustainable production and consumption. It is one part of the broader environmental movement and consists of organisations seeking to conserve fisheries and marine ecosystems primarily through the use of market-based approaches. Companies involved in fishing, processing, wholesaling and retailing seafood are increasingly concerned about the risks to their investments and public profile and are responsive to adopting these approaches. Campaigns of ENGOs, some of which have included shaming companies seen as doing the “wrong thing”, have been key drivers in this concern about risk. While not all marine conservation organisations use market-based approaches, the sustainable seafood movement has become a prominent component of marine conservation efforts in North America and Europe.

The sustainable seafood movement has a presence also in many other markets. Two examples include the Southern African Sustainable Seafood Initiative [13] and the ‘I’m FINished with FINS’ anti-shark finning campaigns for Singapore and Hong Kong [14]. The sustainable seafood movement has to date been a stronger influence on markets in some countries than others. Globalization, including of social movements, does not manifest homogeneously in every location around the world, rather, global phenomena are localised [15]. Local histories of concern about environmental damage vis a vis industrial development, the presence of environmental protection stories in local language media, the political history of relations between government, industry and environmental activists in different countries all create path dependencies. Globalization of the sustainable seafood movement does not mean that all countries around the world will follow the same pattern of ecolabeling, wallet cards and celebrity chef activities that have occurred in the UK or the USA. The messages of transnational ENGOs are received differently by different populations, and local NGOs may take the cause up differently. Local food cultures and consumer concerns also affect the effectiveness of sustainability messaging [16–19].

There is a growing body of research examining the activities of key actor groups in the sustainability movement, with the role of consumers portrayed in various ways. The sustainable seafood movement has targeted informed consumers as “agents of societal change” for decades [20]. The idea of consumers driving sustainability improvements by “voting with their wallets” has been the focus of both academic and marketing research, which has centred on green or ethical consumerism through willingness-to-pay studies and examining the use of price premiums for ethically labelled products to confer economic benefit for doing the “right thing” [21]. The assumption is that price premiums or procurer preferences for ecolabels will incentivise more sustainable fishing practices or

management [22–24]. This tendency has been conceptualised as a logic model by Alexis Gutierrez and Thomas Thornton [25] (see Figure 1.)

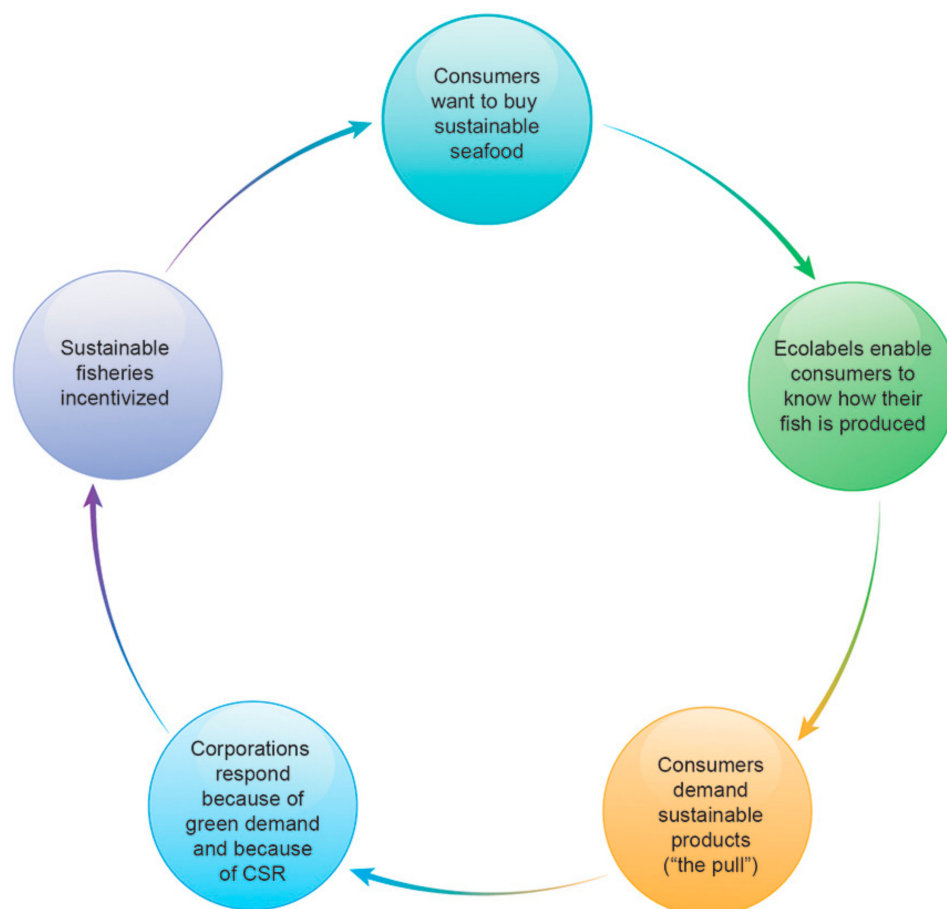


Figure 1. Consumer-driven logic for ecolabels. Source: Gutierrez and Thornton [25].

Notwithstanding the prevalence of this logic model, some researchers question the efficacy of consumer-oriented research tools [25] and price incentives [26]. An “attitude–behaviour gap” has been used to describe how, in the case of sustainable food consumption, attitudes alone are often a poor predictor of how consumers will behave at the checkout [27]. These researchers found that while consumers placed importance on seafood sustainability, this was not reflected in their fish consumption patterns nor in their general attitudes about eating fish, leading them to conclude that ethical considerations about environmental stability do not significantly shape fish consumption behaviour [28]. Recent survey and interview research with consumers in the USA on their values around seafood including willingness to pay a premium for product certified as sustainable showed that sustainability was less important than price, even when consumers said sustainability was important to them [29]. Beyond the seafood sector, there is also research showing weak consumer demand in other sustainability movements [21,30,31].

Since the sustainable seafood movement continues to grow, with market-based interventions influencing nearly 25% of wild-caught seafood globally [32], drivers other than direct consumer demand must be operating. Retailers, brands and fishing companies continue to invest in sustainable seafood certification and sourcing. Gutierrez and Thornton [25] assert that seafood ecolabel markets are not driven by consumer demand but by the interactions of social movement organisations, states, consumers and companies. According to Gulbrandsen [33], it is the same situation for forestry ecolabels. Rather than responding to consumer demand, retailers and brands are responding to

pressure coming from the environmental movement, both through campaigning and increasingly through company-NGO partnerships. Fishers are incentivised to seek certification so as to improve or maintain market position or achieve price premiums. ENGOs also partner fishing enterprises to encourage them to achieve certification [34]. By this logic, ecolabels operate along the lines of Figure 2.

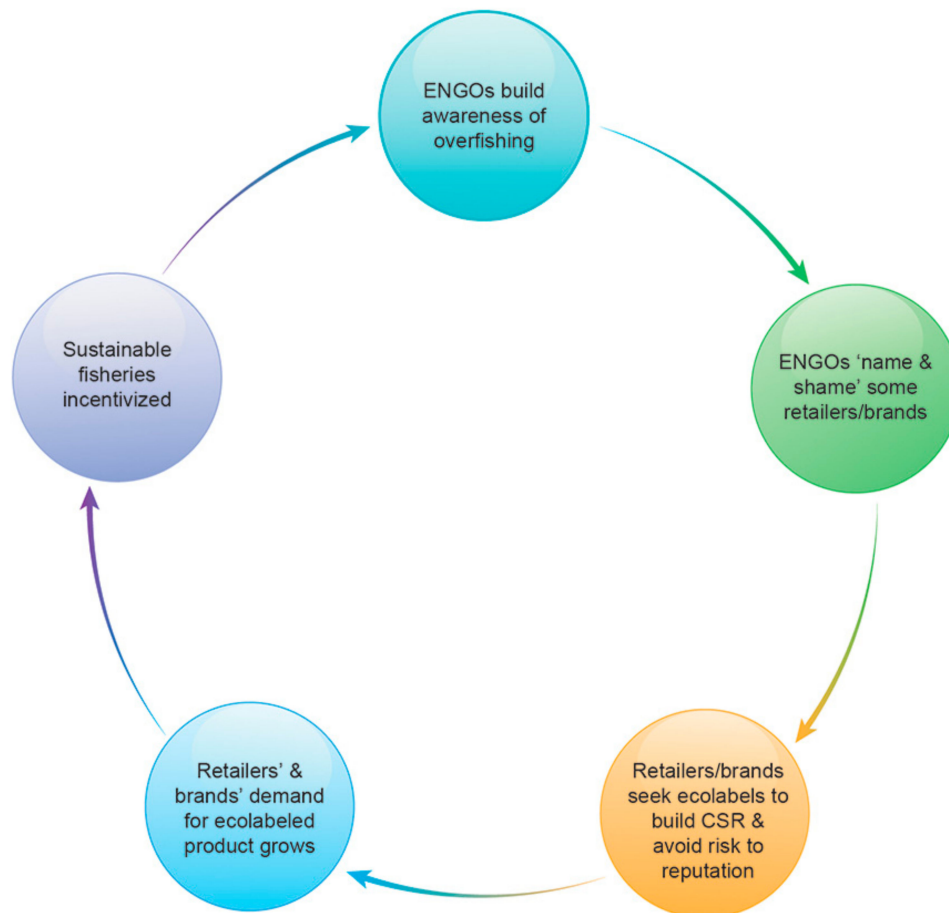


Figure 2. Retailer/brand and environmental non-government organization (ENGO)-driven logic for ecolabels.

Although the dynamics between retailers and the environmental movement are certainly a key factor behind the sustainable seafood movement, we argue that it is not enough to replace the consumer-driven logic with a retailer/brand-and-NGO-driven logic. In the first logic, consumers are inaccurately depicted, and in the second they are left out entirely. Are consumers really unimportant in the sustainable seafood movement? To whom are ENGOs doing the naming and shaming? Retailers and brands are concerned about their reputation with whom? We find that consumers play a role as audience for ENGOs' naming and shaming performances, which then pushes brands/retailers to pursue sustainable procurement strategies. Furthermore, shop-floor consumers are not the only audience for the activities of the sustainable seafood movement. Reputation with the general public who may or may not buy the products in question is important, and investors and regulators are also targeted in these performances. The purpose of this paper is to argue that the logic driving the sustainable seafood movement is best characterised as a "governance concert" with the audience made up of various stakeholders, including consumers as one important group.

The governance concert idea comes from governance and consumer research. Rather than seeing governance arising from one particular group of actors, such as government, the market, or in this case consumers, governance arises from diverse actors interacting in "concert" [35].

Sywngedouw's "choreographies of governance" illustrates this, explaining the emergence of governance innovation and the shift from either state-led or market-led governance, toward new combinations of "hierarchically nested and relationally articulated" actor networks [5,36]. Existing research into ecolabels and green consumerism lends support to the idea that comprehensive understanding of sustainability movements comes through viewing them as concerts made up of diverse actors working synergistically, rather than as being driven by one type of actor in isolation [37]. Ahir Gopaldas [38] conceptualises the retail space as a theatre for the performances of activists, retailers and brands to consumers, with activists aiming to recruit consumers to their cause and discipline suppliers, brands aiming to promote themselves, and consumers learning and communicating about products as part of their cultural lives. Echoing this, Gulbrandsen [33] finds that cases of fishery and forestry labelling indicate that the interactions of social movement organizations, states, consumers and companies explain the rise of labelling markets.

This paper arose through reflections on our previous empirical work on the tuna industry [5,16,39–43]. We became aware of the lack of analysis on the role of consumers in work on market-led approaches for sustainability. As noted above, research on the sustainable seafood movement tends to (a) assume consumer choice is a driver; (b) find that consumer demand is weak; or (c) find that it is the interaction between NGOs and retailers and brands that drives the movement. In each case, the role of consumers as governance actors is not critically examined.

The argument in this paper is based on insights from our previous empirical work along with a qualitative literature review. The literature search was conducted in July–September 2015 and June–August 2016 using databases via Google Scholar, Academic Search Complete (EBSCO) and SCOPUS (Elsevier). We first used terms to elicit articles on consumer behaviour regarding sustainability (such as ecolabel, green and ethical consumerism, sustainability marketing, food sustainability campaigns, consumer facing traceability, ecological modernisation). We then expanded the search to include terms that arose as relevant in some of the different discipline areas addressing the topic (audience, green/sustainable supply chain management, private governance, interactive governance, value chain). We also narrowed each search by combining terms specific to marine resource management (seafood, fisheries, fish, overfishing, aquaculture), but this restriction reduced the pool of literature too far so we included papers not about seafood. We found useful insights in the fields of marketing and advertising, public communication, consumer research, social marketing, green supply chain management, cultural studies of consumerism, and the political economy of private governance, as well as marine resource management.

The initial searching process raised hundreds of articles. By going through titles and abstracts, we excluded those that did not address the drivers for sustainability movements, leaving 192 articles. We read these and narrowed the pool further to 135 articles that illuminated existing research frameworks for understanding the drivers for sustainability movements. The literature was organised using EndNote software, with points from each piece relevant to our research questions included in the entries, producing a large annotated bibliography that could be searched, enabling us to distinguish themes among the articles. Qualitative analysis of the literature material followed an inductive process, as is usual in qualitative research [44]. We identified themes from the literature annotations that addressed and explained the research questions. We triangulated these themes against findings in our empirical work on the tuna industry, "grey literature" reports, media articles and web page statements by relevant organizations.

2. Whose Choice: Consumer or Retailer?

We commence consideration of consumers as part of the governance concert through the increasing tendency to shift the choice between products based on their ethical qualities from the supermarket shelf to retailers' procurement departments. "Sustainability"—which may be indicated by third-party certification or other methods—then becomes part of the procurement policy of the retailer, which requires suppliers to meet certain criteria to be able to sell to their products. At first glance,

this trend is merely evidence that retailers rather than consumers are actively driving sustainability movements, but the trend is also useful for thinking through the role of consumers.

First, some of the rationales for retailers taking the role of checking the sustainability credentials of products on behalf of consumers illuminate the high level of complexity inherent in ethical consumerism in the form of individual shopper choices. A key point about the notion of having consumers choose between items based on their ethical qualities is that there is too much information for consumers to process. Even with just seafood, there are several labels, and there are various wallet guides, and for canned tuna there is an online ranking system, all of which give (sometimes conflicting) information about which types of seafood are more or less ethical to purchase [45,46]. Learning the systems behind each evaluation system and choosing among them is a significant task for even one type of product, and shoppers are expected to do it for every item in the supermarket basket. It is unrealistic to expect consumers to do this thoroughly and systematically [31].

Another important factor is the complexity of consumer ethicality itself. With the most recent wave of ethical consumerism starting in the late twentieth century, market researchers have been trying to work out how consumers who are susceptible to ethical marketing shop. They found the ethical consumer to be an elusive subject and attempts to type shoppers in terms of personality and demographics to predict their commitment to environmental conservation in shopping behaviour have not been very successful [30,47]. The reasons for the inability to identify shoppers who will reliably buy products marketed as green include: (a) there is large variation between types of green consumers; (b) social and environmental ethics do not always trump other values such as quality and price; (c) some green consumers are more committed than others; (d) different types of green consumers respond to different sources of information about the ethicality of products; (e) people may have an ethical concern for one product type but not others; and (f) consumers' ethics regarding shopping may change over their lifetime [21,30,48].

Moreover, another strand of research on "everyday ethicality" shows that concern for the environment is only one among several ethical issues at play behind consumption choices. Qualitative investigations into the ethics of shopping have revealed that rather than some consumers having ethical concerns and others not, in addition to the environmental and social conditions of production concerns more commonly thought of for ethical consumption, shopping always has ethical dimensions, such as caring for one's family, demonstrating thrift, even asserting national identity and political values [47,49–51]. Two consumers making polar opposite choices about what to buy may both have an ethical framework underpinning their choice [51]. Multiple ethics interact in individual purchase decisions, so the choices between ethical paths are often too complex to show up as a coherent pattern of behaviour in favour of any one ethic [30,49]. For example, a desire to support (imported) fair trade products may be derailed by ethics regarding food miles or localism, health concerns may lead shoppers away from some products with social or environmental responsibility qualities. The higher cost of products labelled as socially and environmentally responsible conflicts with a thrift ethic. A fair trade organic cotton shirt is incompatible with reducing one's ecological footprint by buying less [38,47,50]. Survey and interview research with consumers on their values around seafood in the USA found that in addition to sustainability, other concerns consumers have while purchasing seafood include price, nutritional value, and concerns about antibiotics and other additives [29]. Recognising this, some studies evaluate willingness to pay for several different kinds of ethical benefit in fisheries, including labour conditions as well as environmentally sustainable practices [52,53].

Both of these complexities—the amounts of information needed to decide between products on even a single factor such as "sustainability", plus the multiple ethical claims, along with aesthetic/quality and price values competing in shoppers' minds—can mean that ethical shopping is overwhelming rather than empowering. A shopper who trusts certain labels, such as Fair Trade, can thus be helped by those labels, at least in terms of being relieved of the work of finding out the ethicality of products. However, not all shoppers believe the claims behind the labels, and some indeed see ethical branding as just cynical marketing [47]. Even with ecolabels, consumers still need to weigh

up between products, and that decision-making must be repeated for each item in the shopping basket. In light of all this complexity, a movement driven by consumer choice seems improbable.

Some of the literature on the shift to having retailer procurement systems do the research on products and make the decision for consumers couches the shift in terms of managing this complexity [31,48]. The idea is that shoppers choose a retail outlet whose overall “feel” lines up with their multiple values, including sustainability, trusting the retailer to have worked out the details and only put products that are ethically acceptable to their customers on the shelf. The shift to back-of-house for decision-making may thus simplify some of the complexity of consumers’ multiple values in shopping, but the complexity of information required to determine the ethicality of products then falls on procurement managers. Supermarkets sell hundreds of different types of products and procurement managers cannot become experts in the methods of production for all of them; so intermediary bodies arise to help procurement managers select products that will meet their sustainability criteria. Ecolabels are one way to do this. When large retailers such as Walmart or the UK chain Sainsbury’s commit to sourcing from MSC certified fisheries, they are effectively using the label as a procurement criterion.

There are also other methods for assisting procurement managers make more sustainable choices. The Global Sustainable Seafood Initiative (GSSI) is a tool being developed to enable seafood retail businesses compare between the array of different seafood sustainability certification systems. The Sustainable Fisheries Partnership (SFP) enables procurement managers to find out the sustainability status of whichever fishery they are thinking of buying from and thus implement a sustainable procurement policy without detailed technical knowledge of fisheries and aquaculture systems [54]. WWF advises procurement managers on sustainability across Europe, Australia, North America, Japan, Indonesia, China, and South Africa, working with large retailers, seafood brands, and aquaculture producers [55].

The inherent complexity of consumer ethicality and the shift towards retail chains making ethical choices instead of consumers both demonstrate the point that the sustainable seafood movement cannot be usefully explained by research on consumers only. Consumers must be researched as part of the overall concert, which includes other performers interacting along the supply chain.

There are bodies of research that consider governance in terms of whole supply chains or networks of actors and the interactions between different actors; Global Commodity Chains, Global Value Chains, Global Production Networks, and Supply Chain Management [5,56]. Research on Private Governance also illuminates interactions between different types of actors (for example, [57,58]). For example, ecolabels are apparently private arrangements involving voluntary standards, but in many cases states are also involved [59,60]. The “reconfiguration” approach to the field of Sustainable Consumption and Production, and third generation Ecological Modernisation approaches consider sustainability questions in terms of systems, in which both the individual choices of consumers and firms, and the overarching structures of industrial capitalism are key to improving sustainability [37,61]. The Interactive Governance approach in fisheries specifically looks at interactions between multiple diverse actors, mainly focused on the fishing node of the chain [62], but in some cases looking at whole supply chains [63].

Some of the insights gained from these approaches that consider governance as arising from the interaction among actors include the following: (a) power relations are key to the capacity of players to drive sustainability initiatives [57,64,65]; (b) the alignment of business interests along the supply chain enables sustainability initiatives while misalignment obstructs [31,43,66]; (c) ecolabelling has had the effect of disadvantaging smaller producers, especially the poor in the global South [6,67–69]; (d) evaluating the effectiveness of corporate social responsibility (CSR) activities is an important new research frontier [56,68,70]; and (e) ecolabels alone are not enough to address the sustainability challenges brought about by global industrial production [71]. Notwithstanding the value of these insights, none of these bodies of work address our questions about the role of consumers

in sustainability movements. To further develop knowledge about sustainability movements as a governance concert, further attention must also be paid to the role of consumers.

3. Audience in the Governance Concert

In the contemporary business world, it is crucial for companies to be seen as “doing the right thing”, and conversely avoid being seen as “doing the wrong thing”. Initiatives such as ecolabelling may be seen as a performance of “greenness” on the part of retailers and brands. We argue that the main role of consumers has been as an audience in the sustainable seafood movement governance concert. Understanding consumers as an audience who think and feel things about companies more accurately conceptualises their role in the sustainable seafood movement, rather than as purchasers who directly financially incentivise the use of ecolabels.

3.1. The Aims of CSR

Conventional research on the sustainable seafood movement focusing on consumer choices to buy particular seafood products is concerned with one type of communication—marketing. However, concern about increasing revenue through selling specific products is only a narrow part of why firms engage in CSR initiatives. Sustainability and broader CSR initiatives are associated with communication strategies that go beyond getting consumers to buy or pay more for particular products. CSR activities are often about building and protecting corporate reputation [72], including building trust and “social license to operate” [73]. Studies about ecolabeling in forestry and other sectors note that ecolabels do not generate a clear incentive for ecolabeling through price premiums, echoing findings in seafood. In many cases, ecolabels are treated as a way to build and protect reputation with credible third-party information about social responsibility rather than as a way to directly increase revenue [26,31,33].

Some ENGO campaigns are key to this situation, through having drawn public attention to problems with overfishing or bycatch, and “named and shamed” some companies as sourcing unsustainably. One study of ecolabeling in forestry concluded that companies using the labels were not so concerned with whether the label caused consumers to choose some products over others, they were more concerned to demonstrate to consumers that their company was not part of the problem being highlighted by ENGOs [33]. Why might profit-seeking companies be more concerned with whether consumers see them as socially responsible than with the revenue they earn directly from the sales of ecolabeled products? Part of the answer here lies in brand value.

Companies engage in sustainability initiatives as a way to build the symbolic value of their brand through advertising and other marketing activities. In some cases, they do this even knowing it will not generate more sales or higher prices for the products being promoted. Their aim is to accrue value at a higher level in the company, for example, through share prices traded on financial markets [74]. Consumers play an important role here, as audience to the branding performance. The messages of sustainability initiatives become part of consumer culture. This form of communication has become key to management as well as marketing, because public opinion, involving feelings and thoughts about companies, has grown to be a central part of shareholder-facing corporate governance [75].

Environmental and social concerns are thus central to many retailers’ advertisements, and public relations campaigns, used to portray the company as a responsible corporate citizen [67]. One study of pricing in seafood ecolabelling gives an overview of the communication strategies that may be at play in retailers’ use of ecolabelling: retailers may be using ecolabels to differentiate themselves from other retailers; they may use them to imply that all products in the store are similarly sustainable; they may use them as loss leaders as part of a broader profit maximization strategy to bring consumers into stores; and they may form part of a broader corporate responsibility campaign to project a positive corporate image [26]. For example, Walmart and McDonalds have several times pledged that all their wild-caught seafood products will be MSC labelled, and in 2015 Ikea made a similar claim [76–78].

These claims have a high media profile, and since seafood is a small part of these companies' overall business, that is a lot of branding for a relatively small procurement change.

In addition to positive effects on branding, mitigating reputational risk is a related driver for sustainability initiatives like ecolabelling [79] and has been identified as a key driver behind the sustainable seafood movement [80–82]. As with brand value, the financial effects of loss of reputation may not be felt specifically in particular product lines, but may be more diffused throughout a retailer business. Costs may occur through stigmatisation, market resistance to environmentally harmful products, and it may occur through public and regulatory hostility towards organisations perceived as damaging the environment [83].

Performing greenness is one way to court consumers, and/or prevent a backlash from a perceived lack of greenness, providing consumers as a mass with considerable power. This power, however, is not being directly wielded by consumers through the conventional logic of “voting with the wallet”, nor by consumer groups agitating for more sustainable sourcing through negotiations with seafood companies, media campaigns or participating in fisheries management meetings. These roles are being taken up by conservation groups [5]. Interviews conducted by the authors with procurement managers in seafood brand and trading companies across Europe, Australia and Japan revealed the operation of this power. For example, during fieldwork in 2011, Kate Barclay interviewed seafood managers in several Japanese seafood trading companies, who said until the early 2000s they would not normally meet with conservation groups. Since then, however, it became important to know what ENGOs were thinking about sustainability in seafood because their campaigns had become a major influence on consumer perceptions, particularly in European and North American markets. The managers thus started meeting regularly with international conservation group representatives.

3.2. *Creating Receptive Audiences*

Several countries with large seafood markets now have a situation where greenness is an important part of corporate image and where conservation groups are key actors in setting the agenda for public perceptions of companies, due to years of groundwork ENGOs have put into building awareness of sustainability problems in production. The sustainable seafood movement can thus be seen as part of a cultural shift towards more environmentally responsible behavior through building awareness of problems associated with fishing and the responsibility of all supply chain actors, including consumers, in supporting better practices. Social marketing researchers have found that altruistic, “biospheric” behavior towards environmental responsibility can be increased when the saliency of those values is strengthened relative to egoistic values affecting just the consumer themselves (such as nutrition, taste and price) via awareness raising activities [84]. This means raising the profile of environmentally responsible consumerism can contribute towards increasing environmentally responsible behavior. Ecolabels can therefore contribute to improving sustainability even when they are not associated with price premiums or increased market share, by sensitising consumers about their actions [85]. Indeed, even when sustainability initiatives may be accurately described as “greenwash”, in that they are not demonstrably directly improving the sustainability of production and seem to be mainly aimed at improving brand reputation, such initiatives can further the aims of the sustainability movement as a form of social marketing [38]. When ubiquitous brands make commitments around seafood sustainability (e.g., large brands' commitments to dolphin safe tuna, or mega-retailers like Walmart committing to MSC certified seafood), the sentiments of ethical consumerism are disseminated to vast numbers of mainstream consumers. Therefore, to be more effective, efforts to improve ocean sustainability must go beyond narrow quantitative research examining direct causal relationships between certification and sales of certified products and/or stocks of certified fisheries, to consider more diffuse processes of normative change and its effects on behavior, in which precise measurement and attribution are difficult [86].

The use of marketing to spread acceptance for social messages requires pre-existing cultural knowledge to be in place [87]. This includes broader cultural trends as well as context specific to

the social message. Information campaigns generate cultural knowledge that there are sustainability problems with the production of consumer goods, central to social marketing [88] and behavioral economics [89] approaches aiming to motivate people to buy greener options. The creation of receptive audiences is a key point for thinking about the conditions under which the sustainable seafood movement can significantly impact fishing practices.

Europe- and North America-based ENGOs started concerted campaigning on overfishing in the 2000s. This included targeted actions at seafood trade shows [90] and sustainable seafood wallet guides and smartphone apps for consumers [46]. For canned tuna, the online Greenpeace canned tuna rankings implemented in several countries have boosted awareness of overfishing associated with certain methods of fishing (see for example, [91]). The efforts of ENGOs have dovetailed with activities by scientists and the media in building public awareness that overfishing is a problem. Examples include much of the work by scientist Daniel Pauly; well-publicised papers on overfishing [92]; investigative journalism into illegal fishing and trading of northern Bluefin tuna from the Mediterranean to Japanese markets [93]; the film *The End of the Line* [94]; and the British television program *Hugh's Fish Fight*, which then turned into an ongoing campaign [95]. The general public may not have a detailed or accurate understanding of the intricacies of sustainability issues in seafood production, but now most people exposed to this media and these campaigns are aware that overfishing is a problem, and thus performances of greenness have become a necessary part of business in the seafood retail industry.

Some of the media campaigns indeed have encouraged consumers to engage actively with retailers, not only in buying more sustainable options, but in asking retailers about the sustainability credentials of their seafood offerings [96]. If the retailer is unable to give a satisfactory answer, consumers may express dissatisfaction and refuse to purchase in front of other customers. These kinds of campaigns complement seafood species pocket guides and/or smartphone apps taking the sustainable seafood movement into the food service sector, whereas ecolabels and rankings of canned tuna are more limited to supermarket outlets. The food service sector constitutes a significant market channel, so if the sustainable seafood movement is to affect production practices it must operate also in the food service sector. Some restaurants use seafood sustainability in their branding [97]. Other types of institution also tap into the sustainable seafood movement to bolster their green credentials, including universities [98], and zoos [99].

The fore-mentioned media and scientific papers have largely been in English language, and until recently ENGO campaigns have mainly been conducted in Europe, North America, Australia, South Africa, New Zealand and so on. Broad public awareness of overfishing as a problem within the seafood consumption sphere (as opposed to the fishing sphere) is much lower in other key seafood market countries. Researchers have pointed out that ecolabelling has been less prevalent in Asian seafood markets than in Europe and North America [45]. People in and around fishing communities across the world are aware of the problems caused by overfishing, coastal development and climate change. The idea that seafood consumers and retailers are, in part, responsible for fixing this problem with their purchasing choices, however, has arisen from the sustainable seafood movement and is less prevalent in parts of the world where the sustainable seafood movement has not yet been promoted actively or effectively. For example, in a recent interview study of Chinese seafood importers, most respondents felt that addressing overfishing was the responsibility of fishing state governments, and not the responsibility of market actors [100]. Traders in that study were asked whether ecolabeling or other market initiatives would be useful for the sea cucumber trade and nearly all responded negatively, saying that they saw no market advantages. In recent years, there have been anti-shark fin consumption campaigns in China so there is some public awareness of overfishing for sharks, but this is not the case for other overfished species such as sea cucumbers [101]. Multinational research indicates that there are no clear delineations regarding the propensity for ethical consumerism between cultural groups (or gender or class) [21]. The significance of ecolabels in particular markets is dynamic, with ecolabels for canned tuna becoming important in new markets where previously they have

not been [102]. Studies in China and Japan have found when people were given information about overfishing before undertaking willingness-to-pay surveys, they showed more positive responses to ecolabels than people who were not given this information [103,104]. Spreading the message that seafood consumption patterns are part of the problem of overfishing is a precondition for the sustainable seafood movement to take root in new markets.

Underlying cultural landscapes mean that messages about sustainability must be framed appropriately in order to gain traction. Market researchers surmise that organisations such as MSC have had little success in Japan because MSC's established strategies were developed in the contexts of Europe and North America. Greater take-up of ecolabels in Japan would require tapping into local conditions, such as the strong food localism movement in that country [105]. The strong role of the state in mainland China and the high profile of food safety should be taken into account in developing sustainable seafood campaigns in China [17]. ENGOs have started campaigning in China in recent years, but using strategies designed and tested in Europe and North America, which has given rise to messages that are not effective in changing behavior among Chinese audiences [106].

The success of a Greenpeace campaign in Australia demonstrates the level of impact possible when the cultural knowledge of the audience is a good fit for the ENGO message. The Australian public has been primed with information about overfishing, and Greenpeace has established itself as an authoritative voice on sustainability regarding canned tuna with local canned tuna rankings since 2009. Furthermore, since the 1970s in Australia, the public discourse about environmental responsibility has been closely bound up with the protection of charismatic megafauna [107]. As part of the canned tuna rankings work, Greenpeace campaigners have been negotiating behind the scenes with brands and retailers to change their procurement policies. They had been unable to get John West in Australia to stop sourcing from fisheries using fish aggregating devices (FADs) that result in greater bycatch than fishing on free-swimming schools of tuna or using pole-and-line methods. John West had thus been ranked low but in 2012 Greenpeace took the campaign one step further, with a YouTube video, demonstrations outside retailers and billboard posters asserting that the fisheries from which John West Australia sourced tuna caused overfishing and the bloody deaths of turtles, sharks and rays [108]. Within three months of the launch of this campaign, John West Australia changed their procurement policy. According to the John West website, "following recent pro-active engagement with Greenpeace we have sought to clarify our current commitment to the sustainable sourcing of tuna" committing that by 2015 the company would no longer source FAD-associated purse seine-caught tuna [109]. This case exemplifies the way the sustainable seafood movement acts as a concert, with an ENGO and a brand both performing greenness to the consuming public as audience. No consumer groups were involved in the campaign. We do not know if the campaign affected sales of John West tuna or whether retailers also put pressure on John West to make the scandal go away, but clearly the general public, including consumers of John West products, were important as an audience. The Australian audience, in the 2010s, was one in which messages about killing turtles and overfishing were effective in influencing perceptions of the John West brand. Another audience at another time may not have been so receptive to the same messages.

The process of creating a receptive audience may be conceived of as developing the backdrop to the governance concert of the sustainable seafood movement. It is a necessary (but not sufficient) condition for the sustainable seafood movement to gain traction. Knowledge and values about overfishing as a problem, and norms that this problem should be addressed at the consumption node of the supply chain as well as the fishing node, become part of consumer culture. Consumer culture sits in the background, colouring perceptions of what kind of behaviour is (il)legitimate and thus influencing behaviour. The tacit knowledge of consumer culture is what renders the shorthand of an ecolabel legible, and is a determining factor in whether an audience is receptive to messages about ethical production and consumption. The process by which some audiences in Europe, North America and other countries have become receptive to the sustainable seafood movement is illustrated in Figure 3. The groups whose actions have most helped generate the sustainable seafood movement—ENGOs,

scientists, the media—are surrounded by stronger colour, but all groups marinate in this new consumer culture. This does not mean all groups or subgroups come to have the same norms or behave in the same way, but it means all groups are aware of the idea that consumers are, in part, responsible for sustainability and can understand why something like an ecolabel might be considered as a solution. The route by which audiences become receptive may differ in different markets.

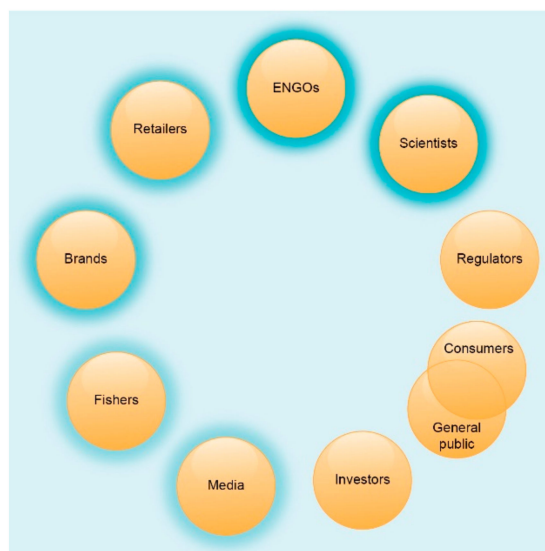


Figure 3. Creating a Receptive Audience for the Sustainable Seafood Movement.

It is not a simple thing to create an audience. The development of the Australian public as a receptive audience for the Greenpeace campaign took place over years for canned tuna specifically, decades if we include the charismatic megafauna aspect. Moreover, setting out to create an audience for a particular message and change behaviour in the desired direction does not always work as planned. Within marketing and communication studies, the field has evolved over the decades from a mechanistic view of audience as programmable through advertising, through to the other extreme of asserting that audiences can freely decide for themselves what to think and feel, back to somewhere in the middle [110]. Well-designed and resourced communication campaigns can have an effect on public opinion, while consumers also develop their own unpredictable ideas about products and industries [111]. Social marketing offers one way forward. Social marketing principles of campaign design, monitoring and evaluation are based on the idea that that success is due to sound understanding of the target audience(s). Much may be learned from social marketing analysis of audience for building strategies to improve sustainability in marine activities [112].

3.3. Non-Consumer Audiences

Consumers are the main focus of this paper, but when we look at consumers as audience in governance concert, it becomes clear that consumers are only one among several audiences. Some kinds of marketing address regulators and other actors who may be influenced by perceptions of the company as a corporate citizen. In addition to customers, regulators, ENGOs and peer companies in the sector are also important audiences for the sustainable seafood governance concert. Furthermore, the general public—including people who do not buy the products in question as well as direct consumers—is an important audience.

CSR initiatives often go beyond consumer-facing attempts to boost sales of a particular product, or even to build a whole brand, and are part of the field of ‘strategic communication’ that targets multiple audiences [113]. Consultants brought in to work with companies on CSR as part of a strategic communication plan may not meet with the sales department, but work with management to target

multiple audiences to build brand and reputation for broad purposes including government relations and investor relations [113]. The rationale for this kind of communication is that if a company is seen as “doing the right thing”, it is more likely to be treated leniently by government in monitoring and if breaches arise. Entire industries may work towards building their collective reputation as corporate citizens, so as to encourage government to let them self-regulate and avoid onerous government regulation [33,67]. In several developing countries, ecolabel certification has been found to improve government perceptions of the sustainability of fisheries, leading to favourable treatment [8], including regulatory leniency, improved resource access rights and provision of infrastructure [114].

Sustainability performances are also increasingly important to secure financial investment. One study points out that, in 2015, 1400 investors managing combined assets of USD59 trillion signed on to the United Nations Principles of Responsible Investment [115]. Companies are seen as performing against a triple bottom line by the public as well as investors and shareholders [56]. This is where the general public, beyond direct consumers per se, become an important audience. Investors that operate under government mandates, such as sovereign wealth funds and pension funds, may be required to meet ethical standards as well as achieve profits. Private investors also often have CSR criteria in their own corporate governance strategies, which may affect their investment decisions. In 2016, Walmart’s two top institutional investors were Vanguard and State Street [116]. Both of these investors have statements about CSR on their websites [117,118], so it is likely that investors are one audience for Walmart’s sustainability initiatives. A superannuation investor withdrew from a large salmon-farming venture in Australia over concerns about the environmental sustainability of the company’s practices [119]. Other kinds of investors for whom sustainability concerns are important include philanthropic organisations, charitable trusts and ENGOs investing in sustainable seafood work [105], including fishery improvement projects and government capacity development for policy and management advancement.

4. A New Logic for Understanding the Sustainable Seafood Movement

Earlier in the paper, we pointed out that the consumer-driven logic of ecolabels is empirically inaccurate, and that the ENGO-retailer/brand-driven logic is incomplete, because it leaves out the role played by consumers. Having critically examined the role of consumers in this paper, synthesising ideas from the literature review on consumers and other audiences for CSR and ecolabels as green performances with our understanding of the sustainable seafood movement as part of a governance concert, we have developed a new model for the sustainable seafood movement (Figure 4). The sustainable seafood movement constitutes a governance concert, with different players, including fishers and aquaculture producers, interacting to drive the story, a backdrop of cultural knowledge making the story legible to the audience, and multiple audiences, including consumers and the broader public (including non-consumers), but also regulators and investors (who are both in turn affected by perceptions held by the general public). When any of these actor groups participates in the sustainable seafood movement, they are performing to certain audiences. Conceptualising the sustainable seafood movement in this way reveals the importance of consumers. While consumers have hitherto not been active in driving the movement through voting with their wallets or through representative groups agitating for change, consumers are a very important audience group. According to our qualitative investigation, more actors in the sustainable seafood movement perform to consumers and the general public than to any other group (as shown by the arrows).

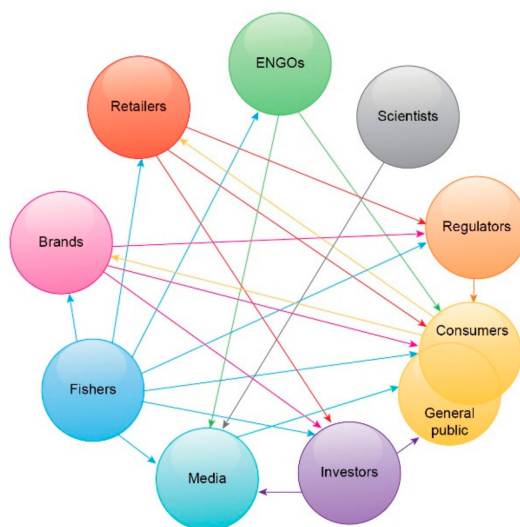


Figure 4. New logic: sustainable seafood as part of a governance concert.

As other researchers have pointed out, ecolabels alone are unlikely to achieve positive change in the sustainability of seafood production [8]. As part of a broader governance concert, however, they may contribute to positive change, for example, through influencing regulatory processes.

The emergence of the sustainable seafood governance concert has not been a smooth or fast process coordinated from a central point, nor does this governance concert manifest in the same form in different places. The cultural knowledge backdrop varies across time and place, with broader social trends affecting audience receptions of the concert. Fishers make a living from the shifting natural and social world, in which market opportunities such as ecolabel certification rise and potentially dissipate [119]. In Europe and North America where the sustainable seafood movement is now coherent enough to constitute an influence on market behaviours, it has emerged organically over two decades with changing dynamics between the different groups involved, not always in synergy. Shifting power dynamics between groups has been a major factor shaping the sustainable seafood movement [12,120,121]. In other large markets in China and Japan where the sustainable seafood movement has not to date been a significant influence, it may yet become significant, but the precise composition of the concert will be path dependent, reflecting underlying differences in the social and market contexts, such as the pre-eminence of food safety concerns in both countries and the well-established cachet of food localism in Japan.

5. Conclusions

In this paper, we have argued that previous research on the sustainable seafood movement has been too narrowly focused on consumers' actual and reported willingness-to-pay for sustainable seafood, and price incentives for certified sustainable seafood. To properly understand why the sustainable seafood movement continues to grow despite weak consumer demand and weak or non-existent price incentives to participate in sustainability initiatives, we need to look beyond single actor groups, such as consumers, and consider consumers acting in concert with other types of actor along the supply chain. From this perspective, audiences, including consumers, constitute a strong reason for participating in sustainability initiatives, even when prices and sales of the product in question are not positively affected by the initiatives. The ecolabel is "working" just by having consumers see it on the shelf, even if they then skim over it to buy a cheaper option. Considering ecolabels as one part of broader communication strategies employed by brands and retailers shows how ecolabels can be fulfilling their aims in communicating to consumers even when consumers do not buy the products or do not pay a premium that covers their greater production costs.

Research into the sustainable seafood movement as a governance concert should thus go beyond the conventional questions—whether consumers are buying sustainable options and the prices they are willing to pay—to understanding consumers (and non-consumers) as audience to the sustainability performances of companies they buy from. In this role, consumers contribute to making retailers and brands buy more sustainable options, and fishers to shift to more sustainable methods. Furthermore, research on the sustainable seafood concert should aim to improve our understanding of the quality and quantity of CSR initiatives in actually improving fishing practices (socially, economically and biologically), for which marketing research design and monitoring and evaluation frameworks constitute a useful direction [113]. A research frontier exists in evaluating what companies are trying to achieve with their sustainable seafood initiatives beyond sales of specific products and the potential impact of these drivers on sustainability in production, or even all the way along the supply chain. Research on audience in the sustainable seafood governance concert could address questions such as why Australian retailers stock a token amount of ecolabeled canned tuna, whereas large retail chains in Europe and North America aim to stock only ecolabeled tuna [68]. Is this difference due to internal values of the companies involved, consumer audiences in the respective markets, the regulatory environments, the concerns of investors for each company, or a combination of the above? How does that vary in the large markets of Japan and China? Noting that these situations change, sometimes quickly, what factors in which markets are decisive in high quality, large magnitude shifts towards sustainability?

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