

Video Evaluation Research

Marine Aquaculture

Prime Group
March 2019

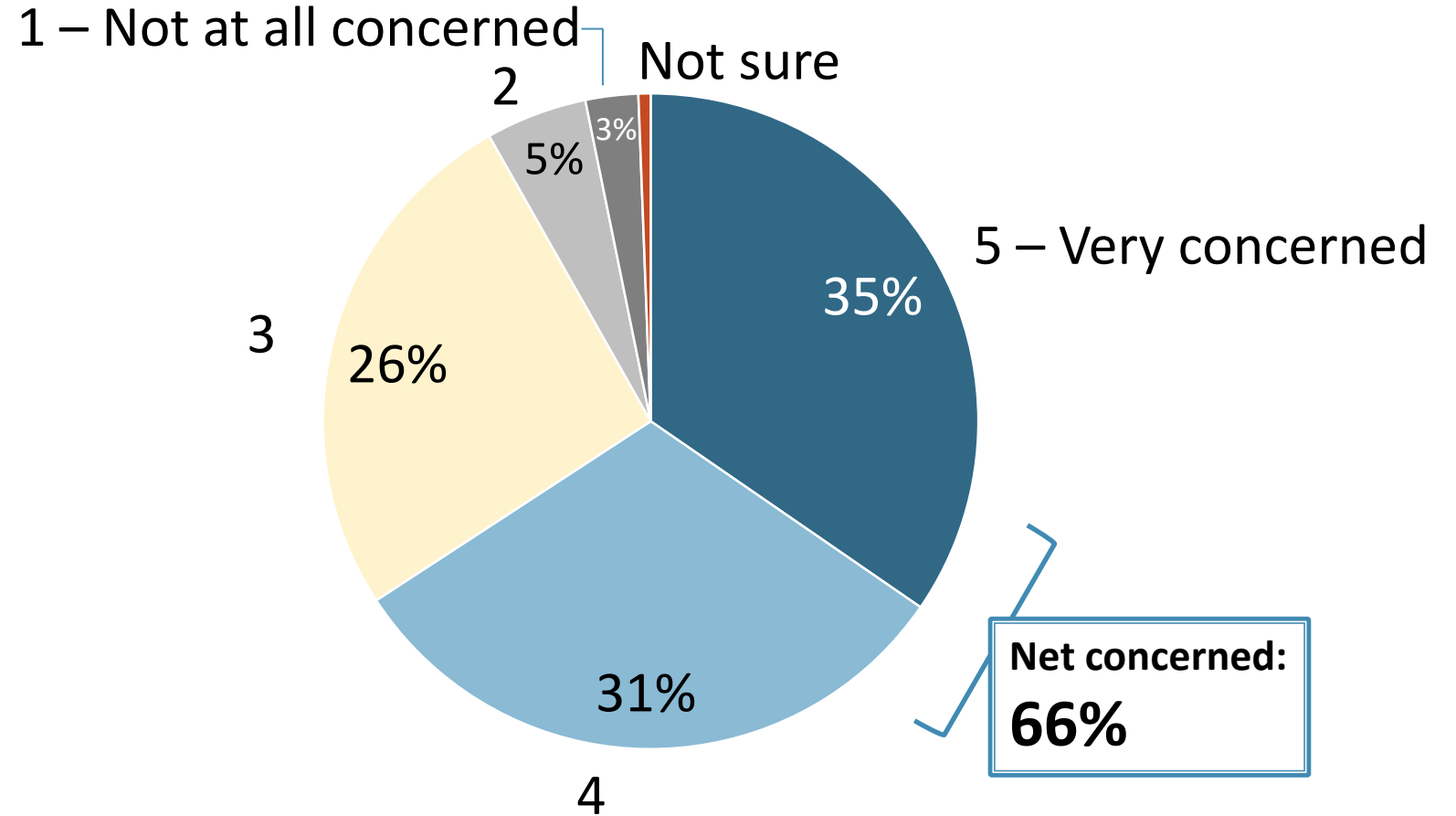


Methodology

- Online nationwide survey fielded February 20–March 1, 2019
- Nationwide census-representative sample
- n=500 completes
- Respondents watched and evaluated five videos about marine aquaculture

Concern for the Environment

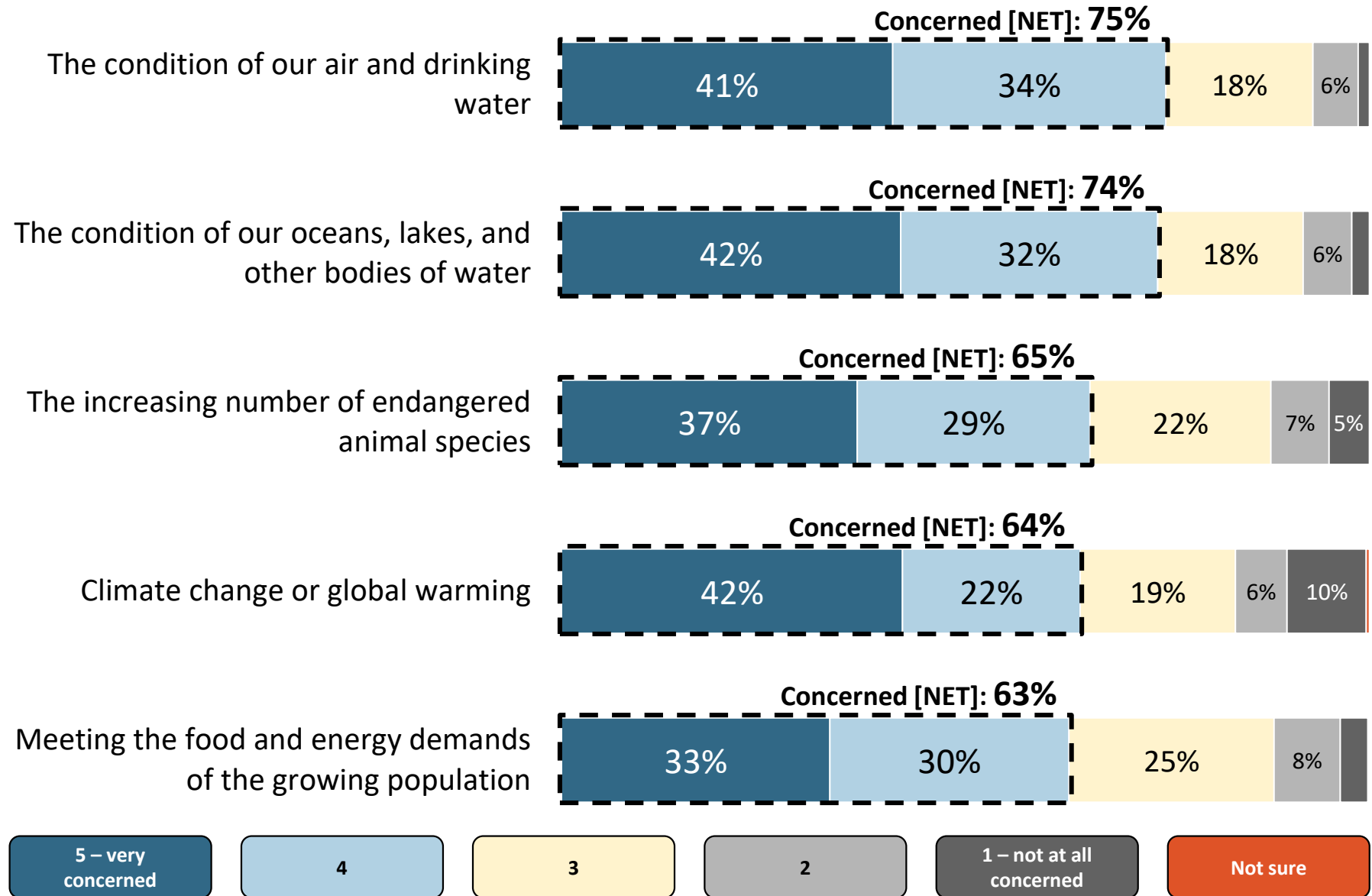
Question wording: In general, how concerned are you about the environment? Please use a five-point scale where “5” is very concerned and “1” is not at all concerned.



Concern for Specific Environmental Issues

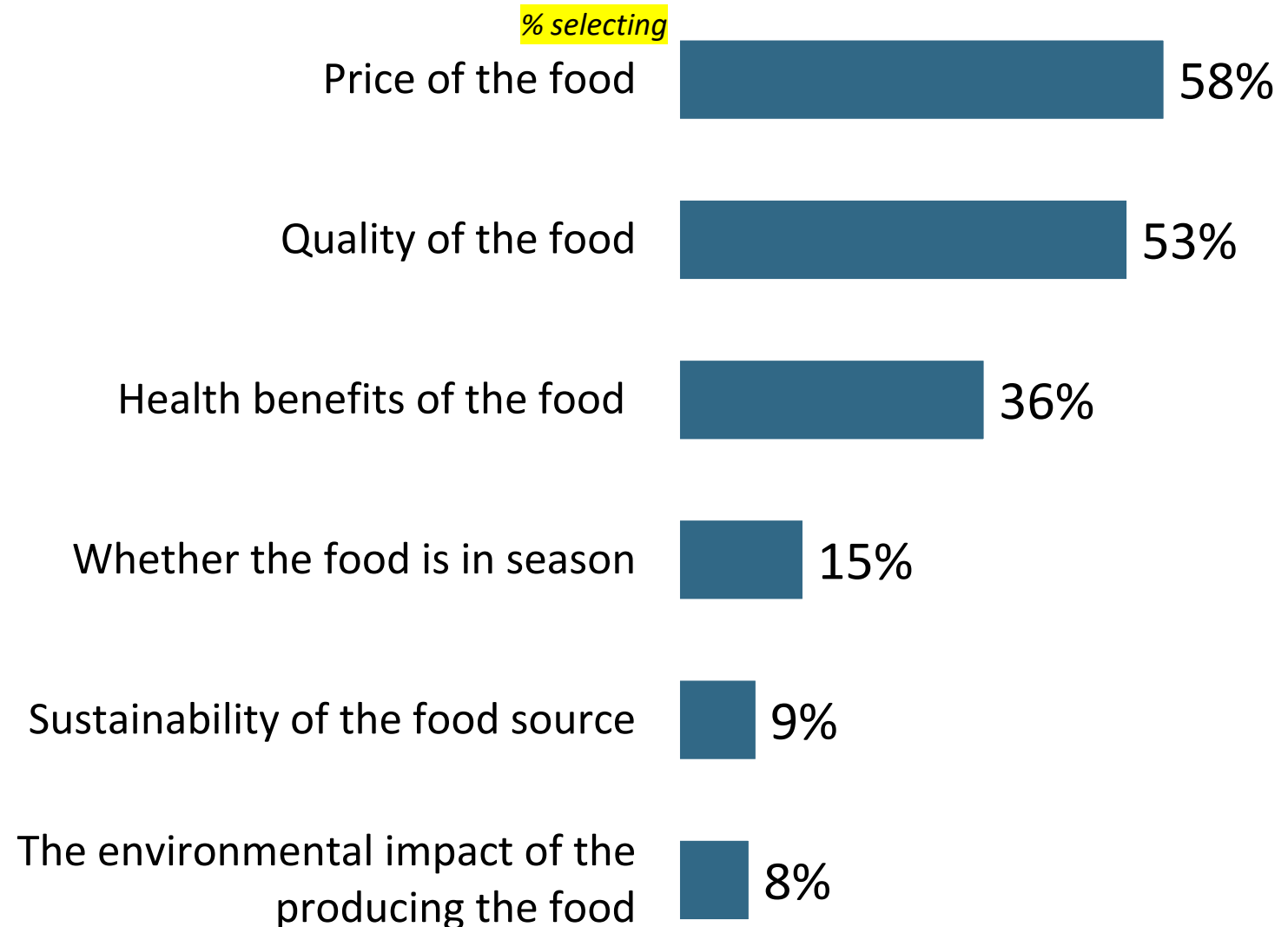
There is greater concern over air and water issues, likely due to a perception that these have a direct impact on everyday life. There is less concern for “global” issues such as endangered species, climate change, or food and energy demand.

Question wording: How concerned are you with each of the following issues using a five-point scale where “5” is very concerned and “1” is not at all concerned?



Factors Influencing Food Purchasing Decisions

Question wording: The following are a list of factors you may consider when making decisions about what food to purchase either at the store or in a restaurant. Please select the two which you consider most important.

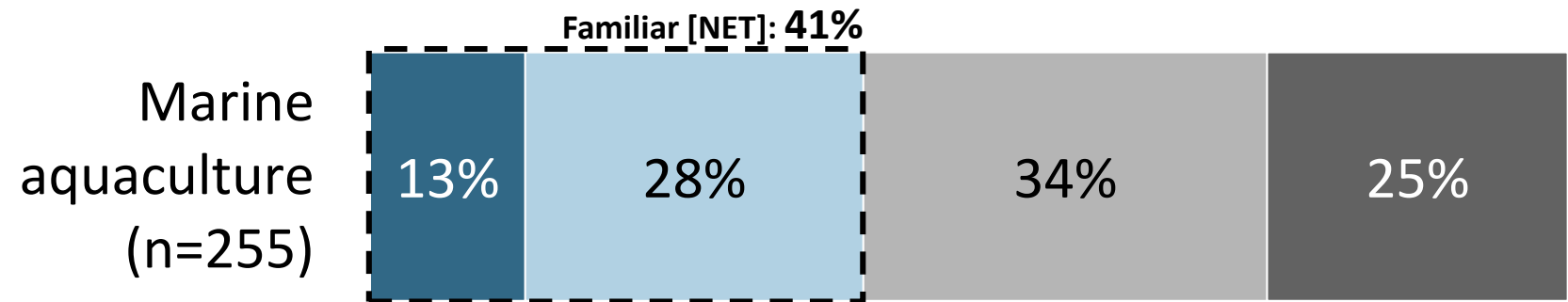
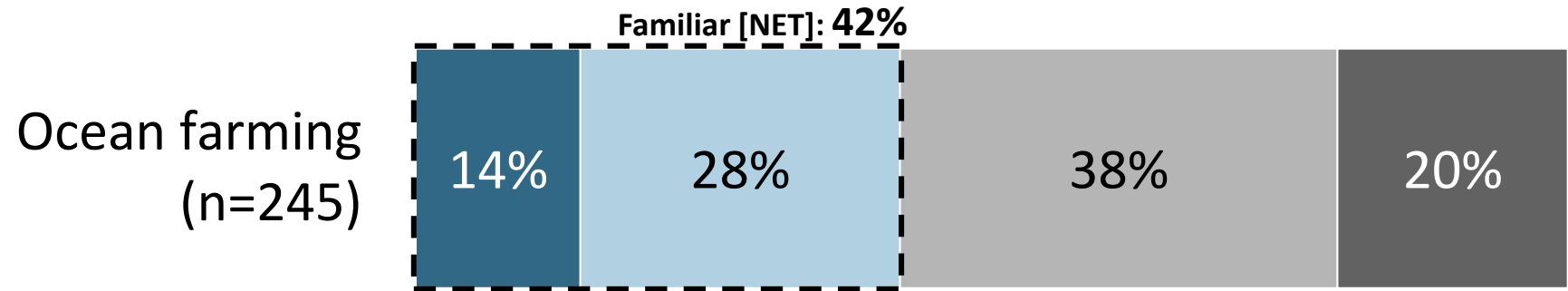


Price and quality are the two most important factors in food purchasing decisions. Other factors may be important as well but in this question their relevance is diminished because of the relative strength of the top two options.

Question wording: How familiar are you with [Split sample: marine aquaculture /ocean farming]?

Familiarity with Marine Aquaculture

There is virtually no difference in ratings between “ocean farming” and “marine aquaculture”. About two-in-five say they are familiar with the concept while three-in-five are either unfamiliar or hearing about it for the first time.



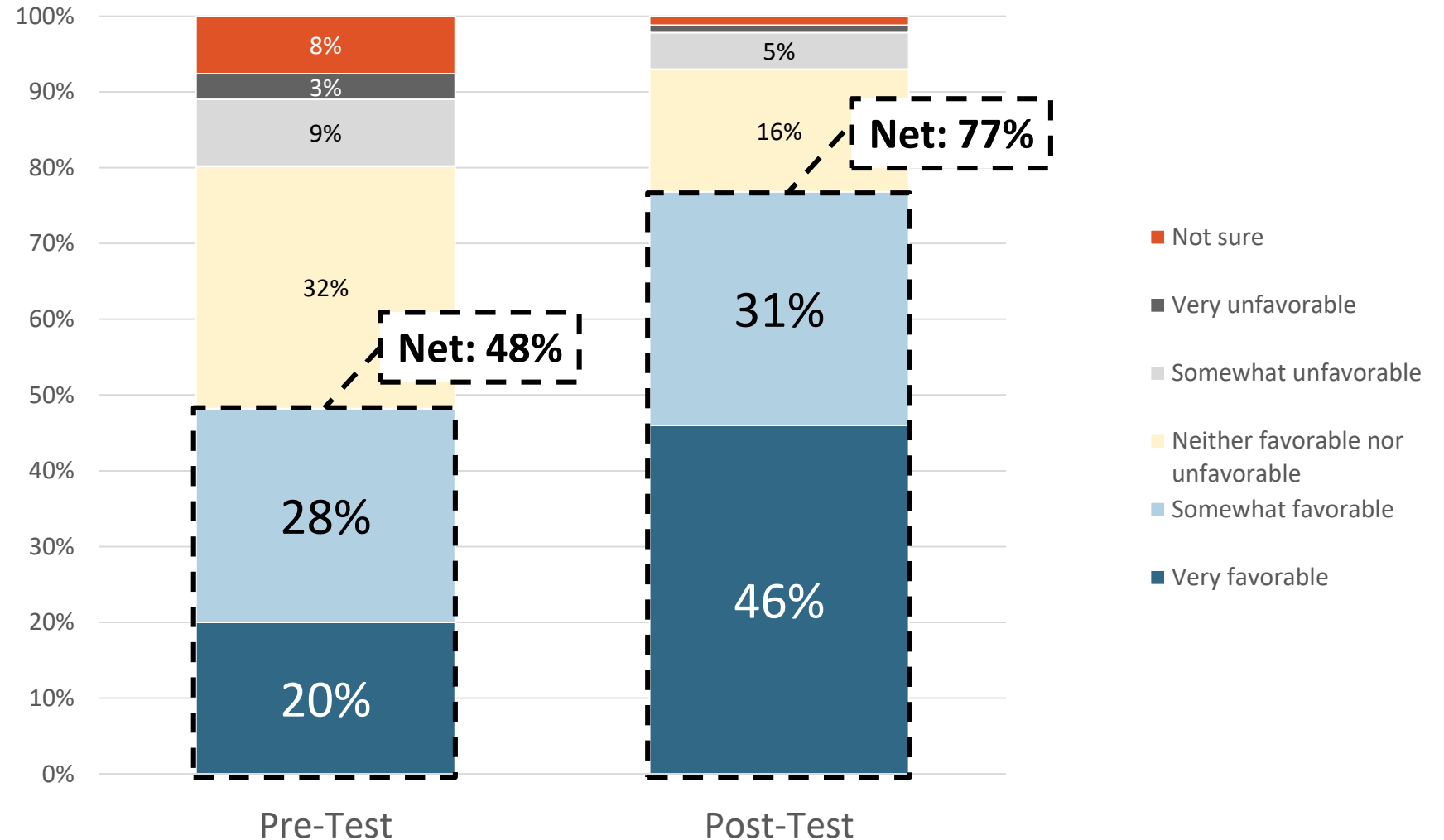
Video Testing Methodology

- Respondents watched and evaluated five videos about marine aquaculture. They were required to view the entirety of a given video before proceeding through the survey.
- The five videos were randomly assigned, with each video shown approximately to 100 respondents.
 - Hawaii Kanpachi (n=98)
 - Main Mussels (n=101)
 - California Oysters (n=99)
 - Maine Seaweed (n=101)
 - South Carolina Oysters (n=101)

Marine Aquaculture Favorability

Question wording: As you may know, much of the seafood that we eat is caught in the wild through commercial fishing. But some seafood is farmed in the water, like livestock are raised for food on land. Farming in the ocean is known as **marine aquaculture**.

Based on this description and anything else you may know, would you say you have a favorable or unfavorable view of marine aquaculture?



The videos “move the needle” on favorability towards marine aquaculture, with net favorability improving by 29 percentage points from pre-test to post-test. Survey pre- to post- test questions seldom display sizable change so this movement is notable.

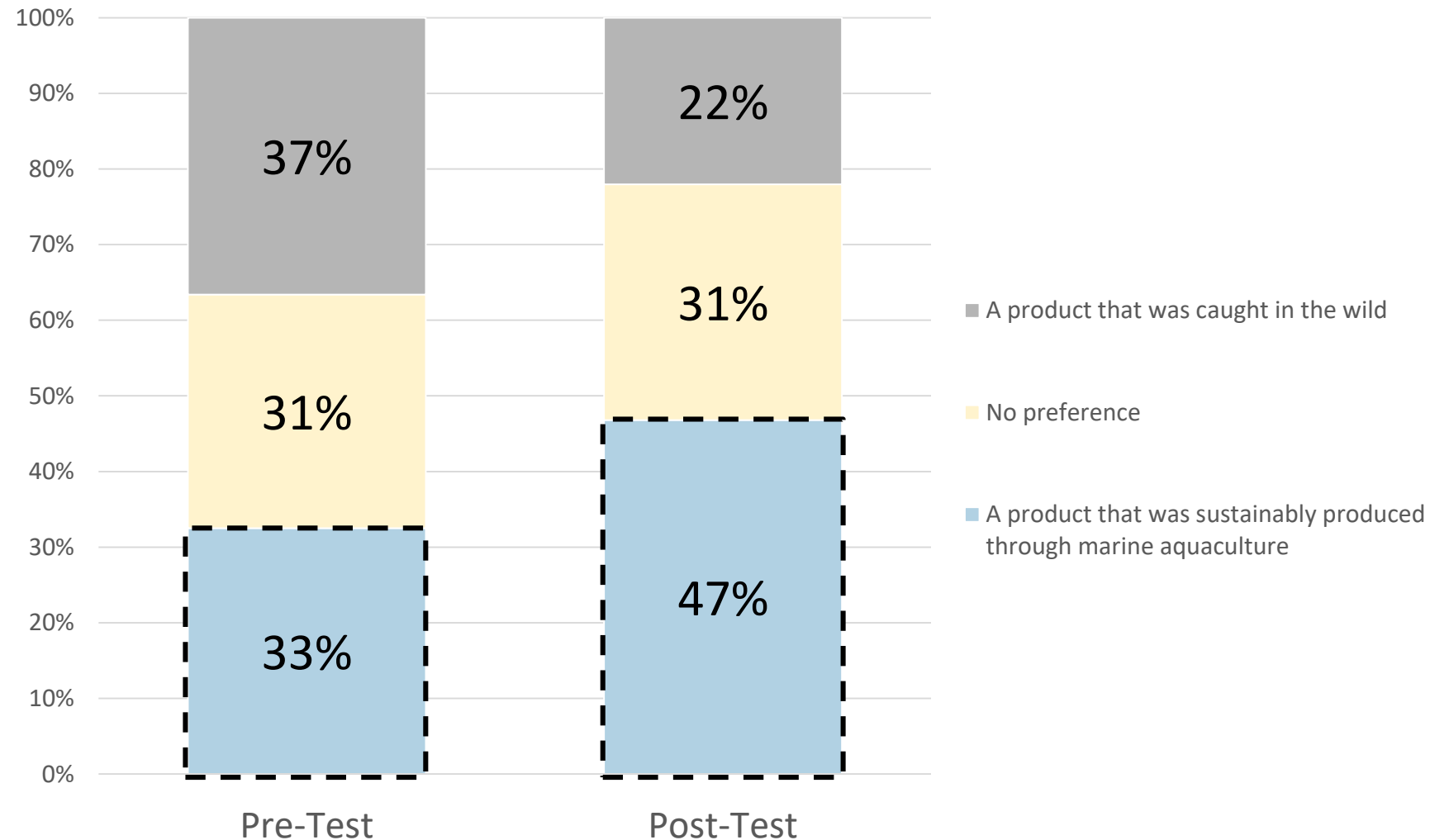
A good number of post-test favorable responses are from respondents who were “in the middle” or unsure in the pre-test. These people were likely being exposed to detailed information about marine aquaculture for the first time.

Seafood Preference

Before viewing the video, more seafood eaters say they would pick a product caught in the wild vs. one produced through marine aquaculture. Post-test, the number of seafood eaters who would pick a marine aquaculture product outnumbers those choosing wild caught by more than 2-to-1.

Question wording: Assuming the two seafood products below were identical in quality, which would you choose?

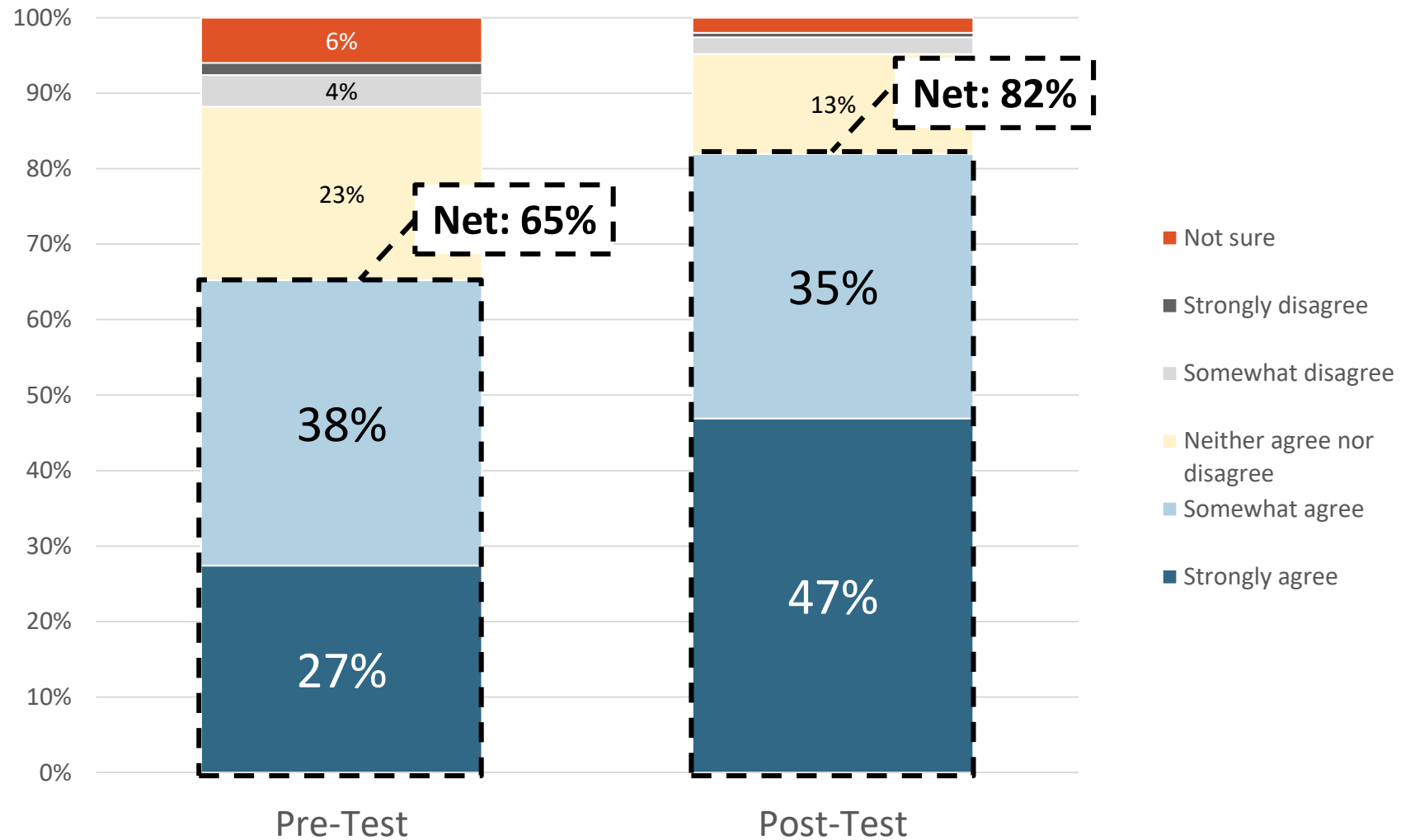
Condition: Respondents who eat seafood daily, weekly, monthly, or occasionally (n=440)



Seafood Produced Through Marine Aquaculture

Question wording: Please indicate whether you agree or disagree with the following statement.

Seafood produced sustainably through marine aquaculture can help support a long-term, environmentally-friendly, food supply for the whole world.



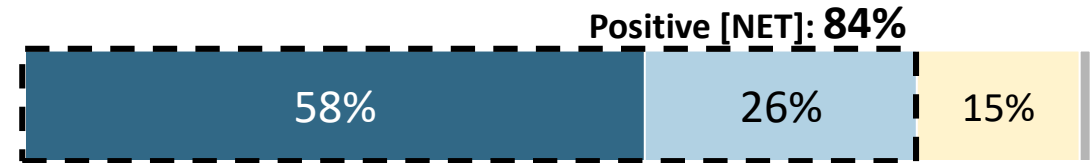
Question wording: Do you have a **positive** or **negative** opinion of the video you just watched?

Positive/ Negative View of Marine Aquaculture

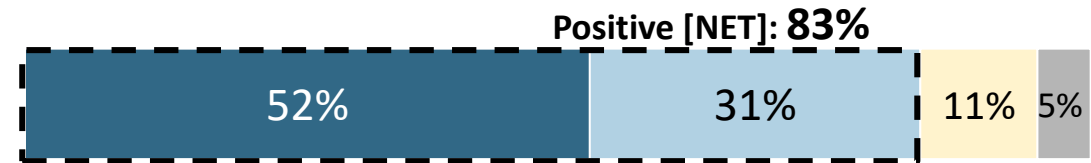
Respondents have an extremely positive view of all five videos.



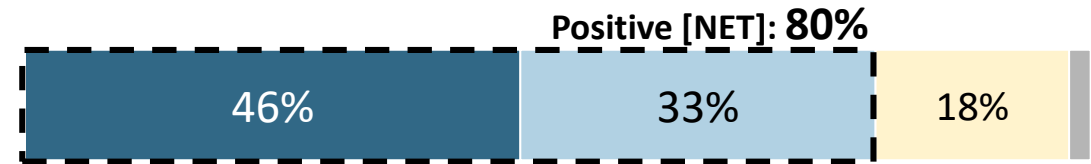
Hawaii Kanpachi



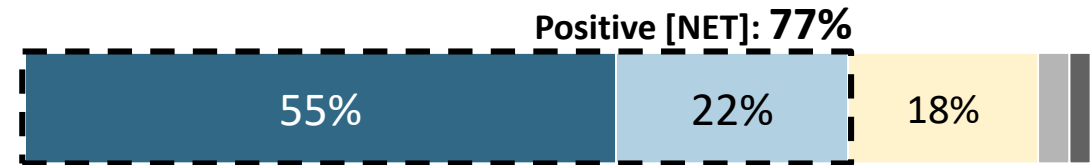
Maine Mussels



California Oysters



Maine Seaweed



South Carolina Oysters



Very positive

Somewhat positive

Neither positive nor negative

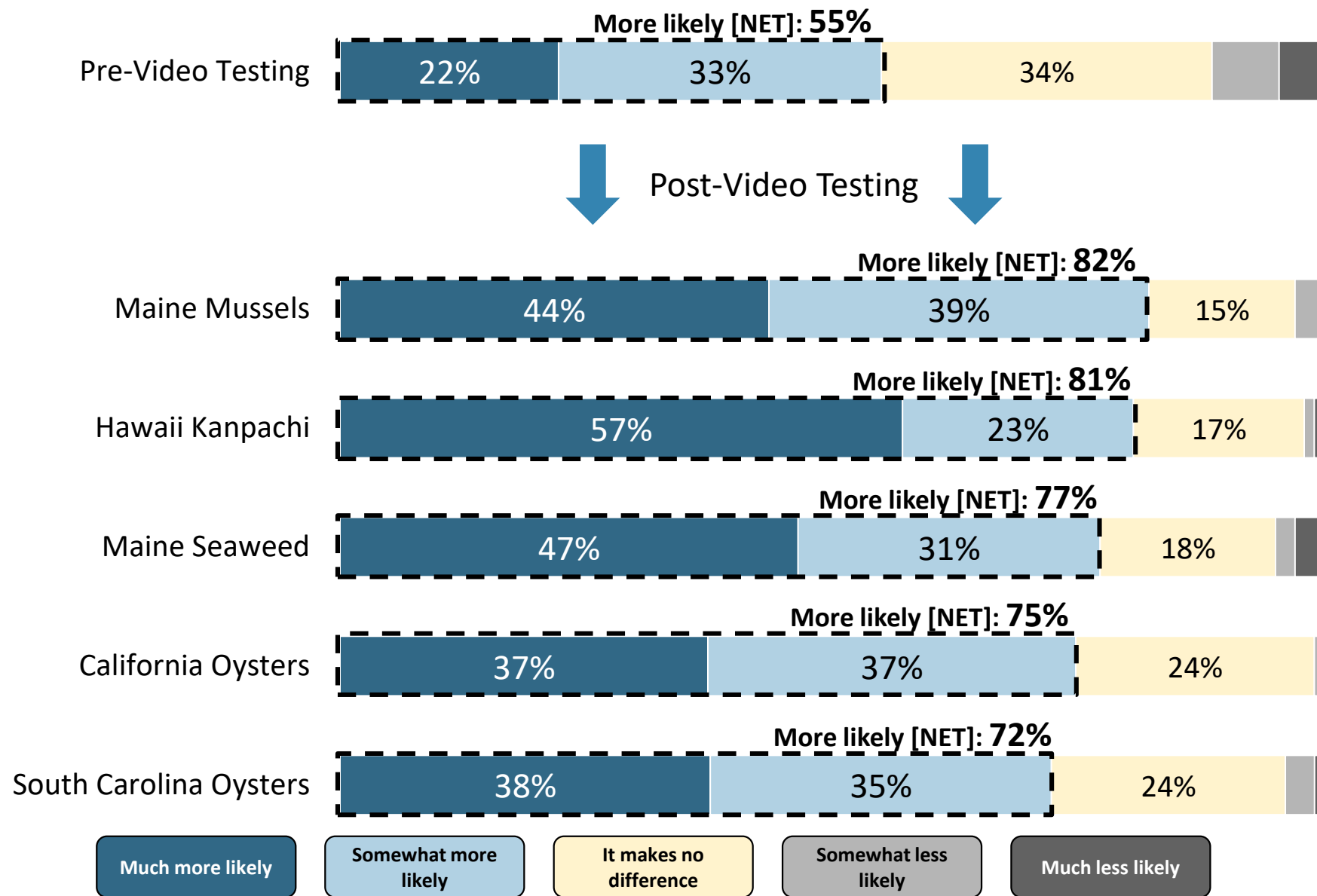
Somewhat negative

Very negative

Supporting the Growth & Expansion of Marine Aquaculture

Stated support for marine aquaculture increases by 17 to 27 percentage points after the video testing.

Question wording: Based on this video, would you be more likely or less likely to support the growth and expansion of responsible marine aquaculture in the U.S.?

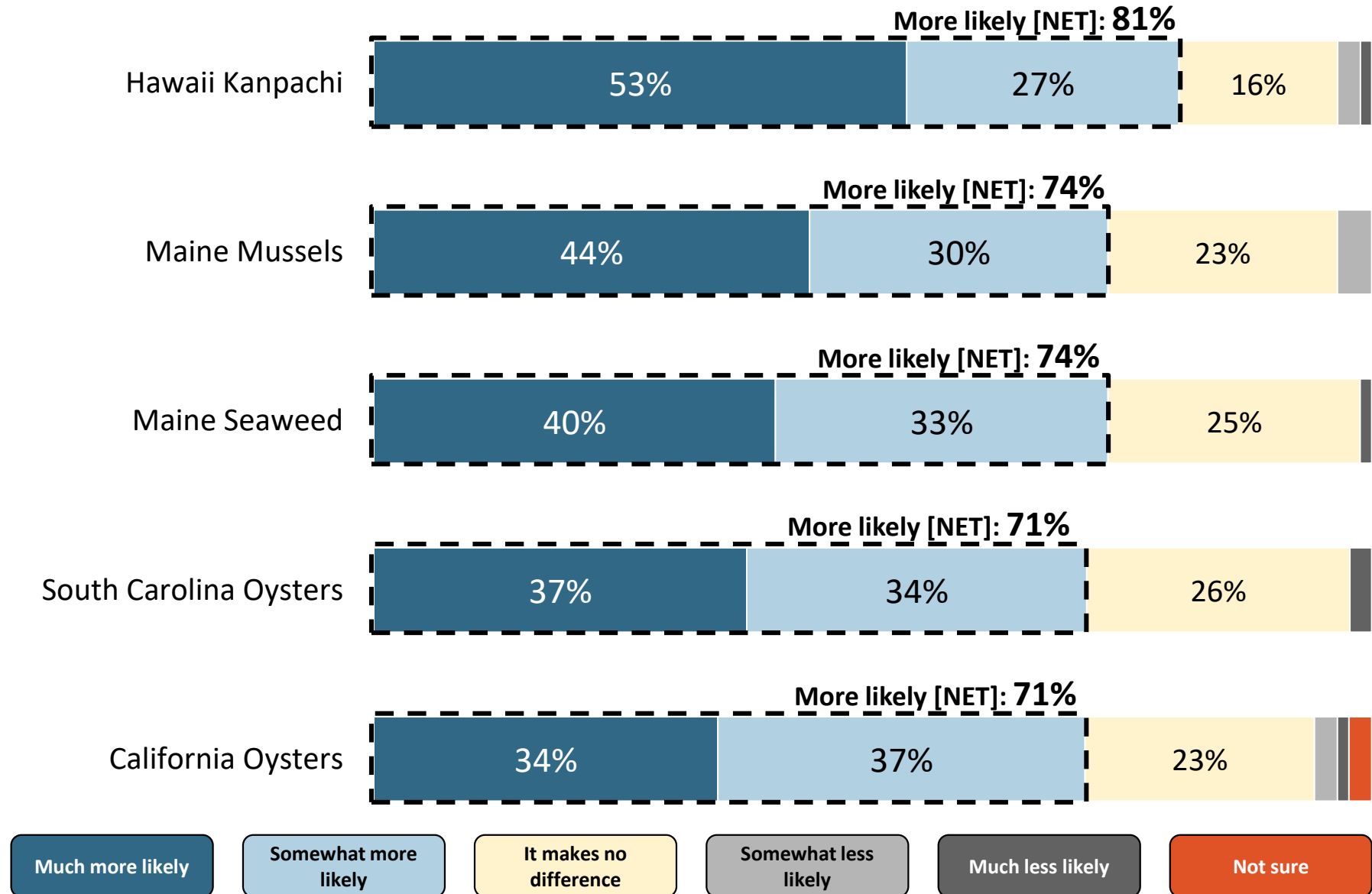


Purchasing Seafood Products

After viewing the video, a majority of seafood consumers say they would be more likely to purchase marine aquaculture seafood. The Hawaii Kanpachi video generates a bigger bump than the other four videos, probably because of a larger consumer market for fish vs. mollusks and seaweed.

Question wording: Based on this video, would you be more likely or less likely to purchase a seafood product that was sustainably produced through marine aquaculture?

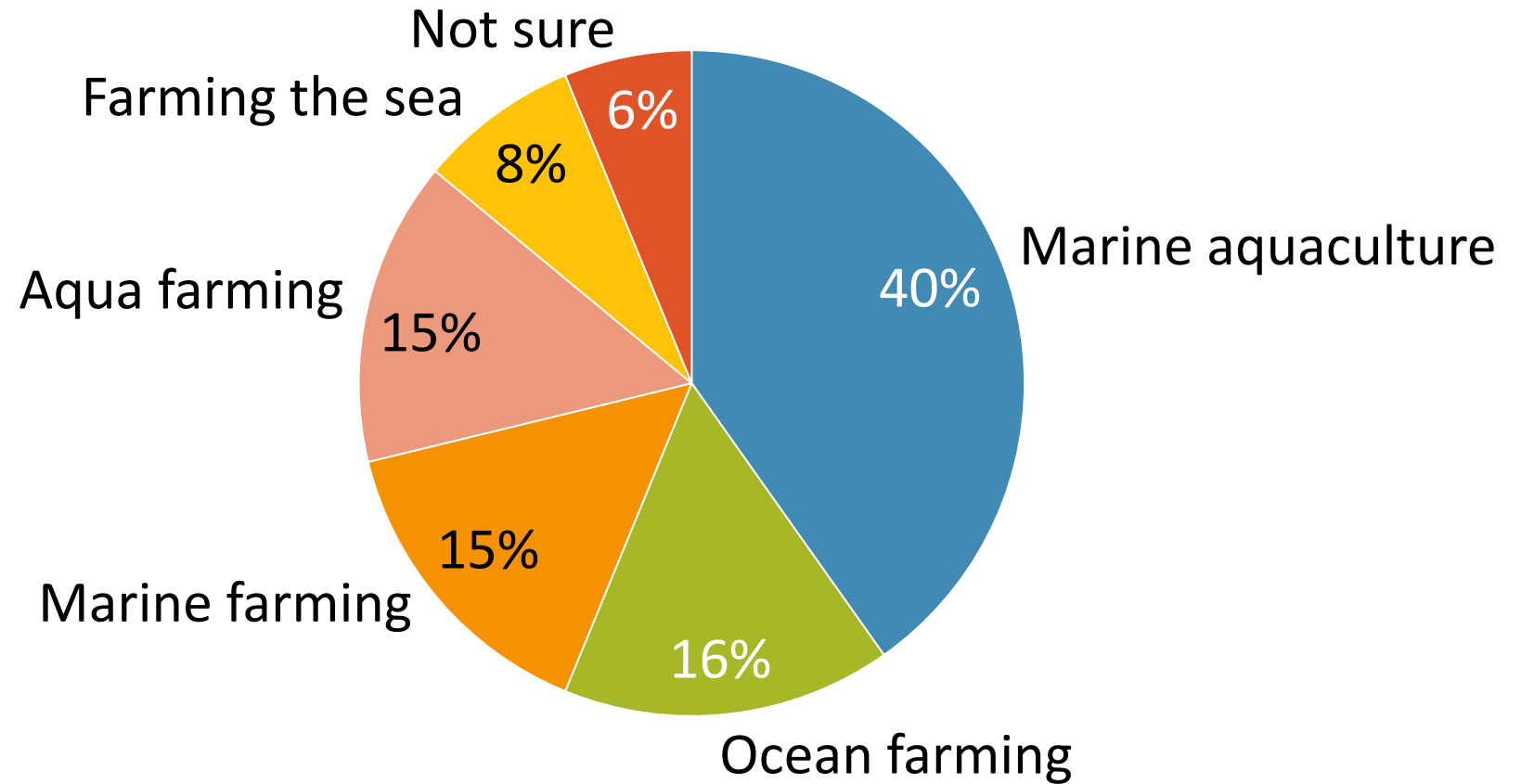
Condition: Respondents who eat seafood daily, weekly, monthly, or occasionally (n=440)



Question wording: In your opinion, which of the following phrases best describes seafood farming?

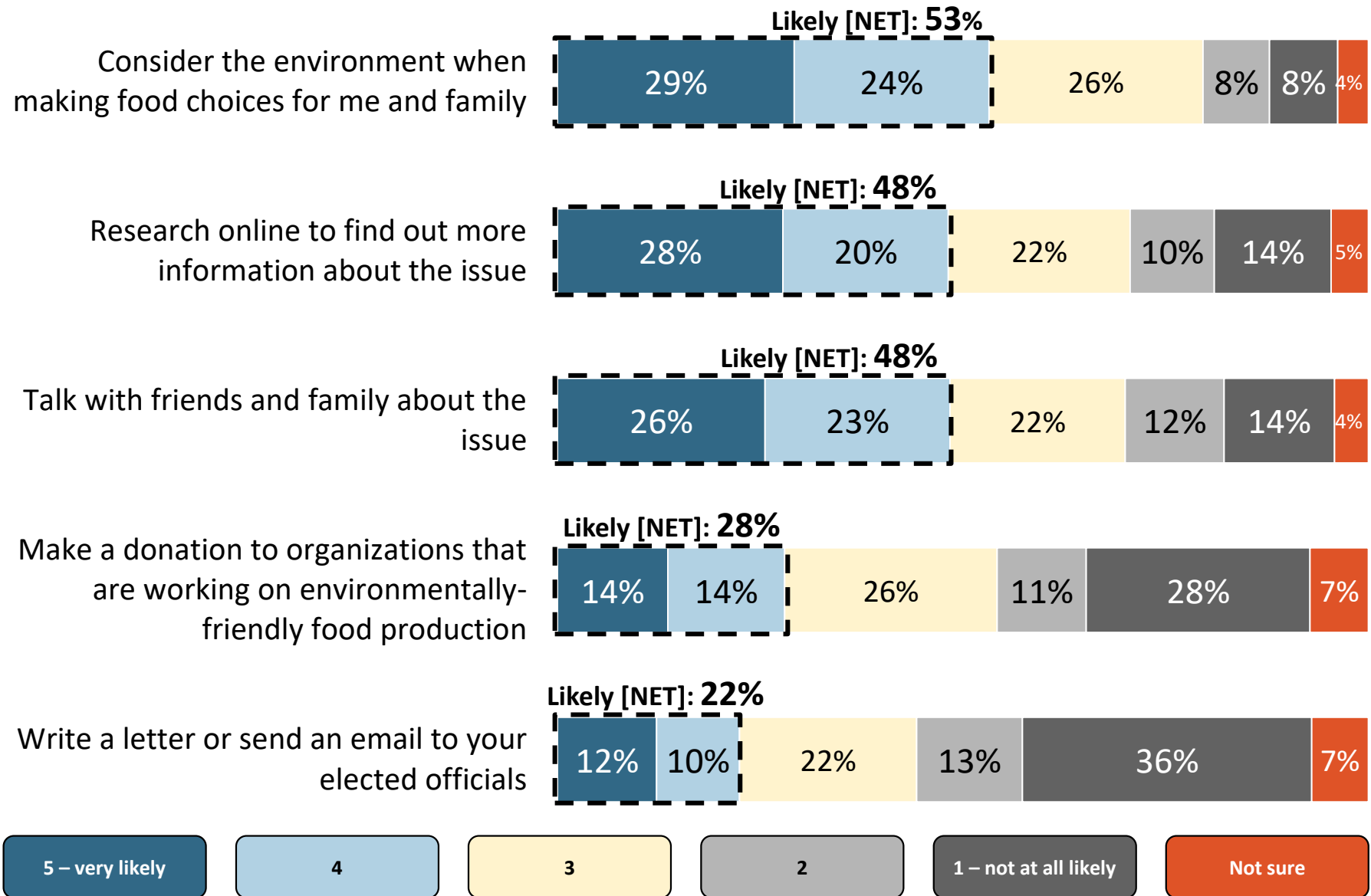
Preferred Terminology for “Seafood Farming”

About two-in-five respondents select “marine aquaculture” as the best description. This question was asked near the end of the survey after the videos, so the fact that respondents have been exposed to the term in the survey and videos probably impacts this measure.



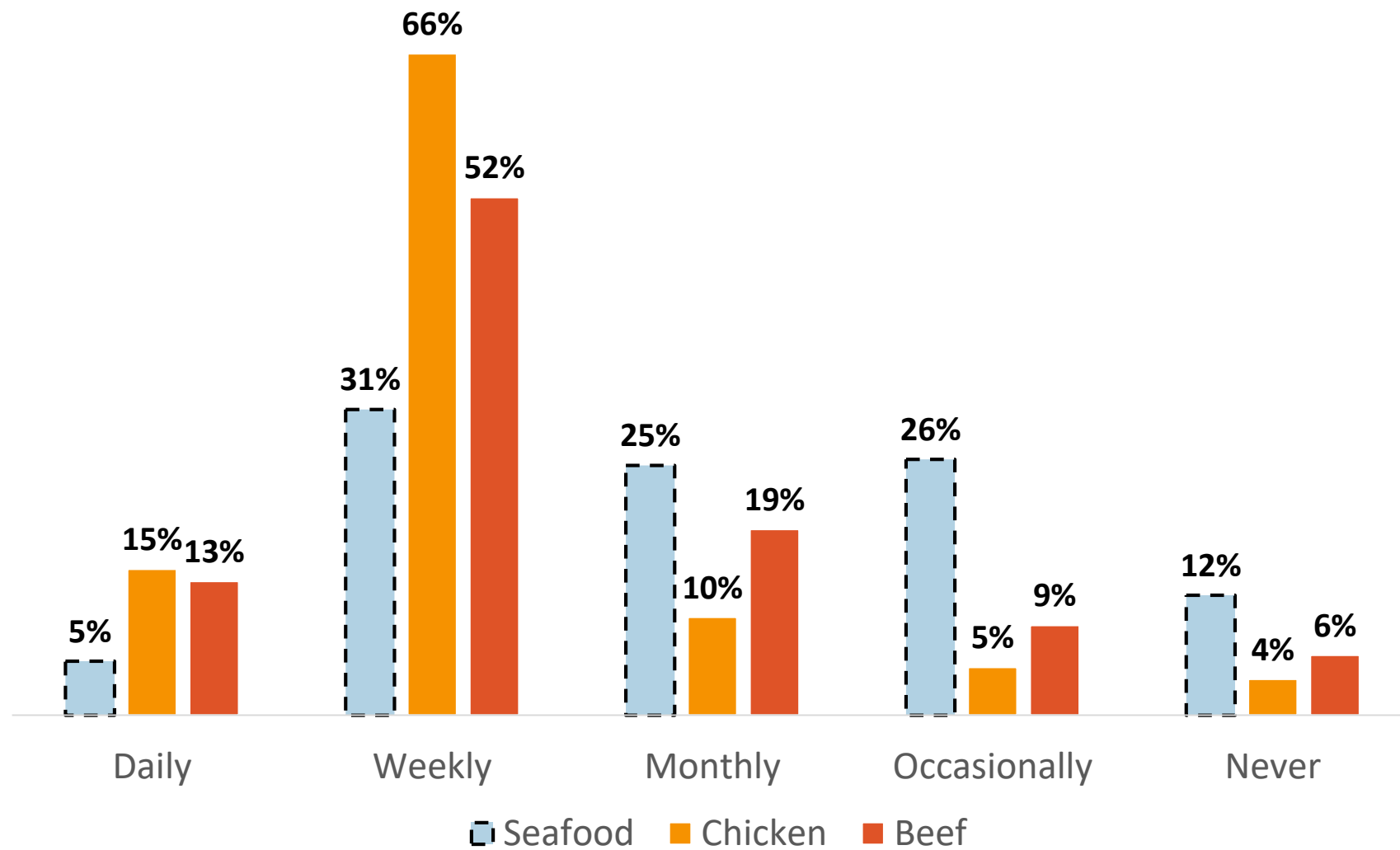
Likelihood to Take Action on Environmentally Friendly Food Sources

Question wording: How likely are you to take the following actions related to the environmentally-friendly food sources?



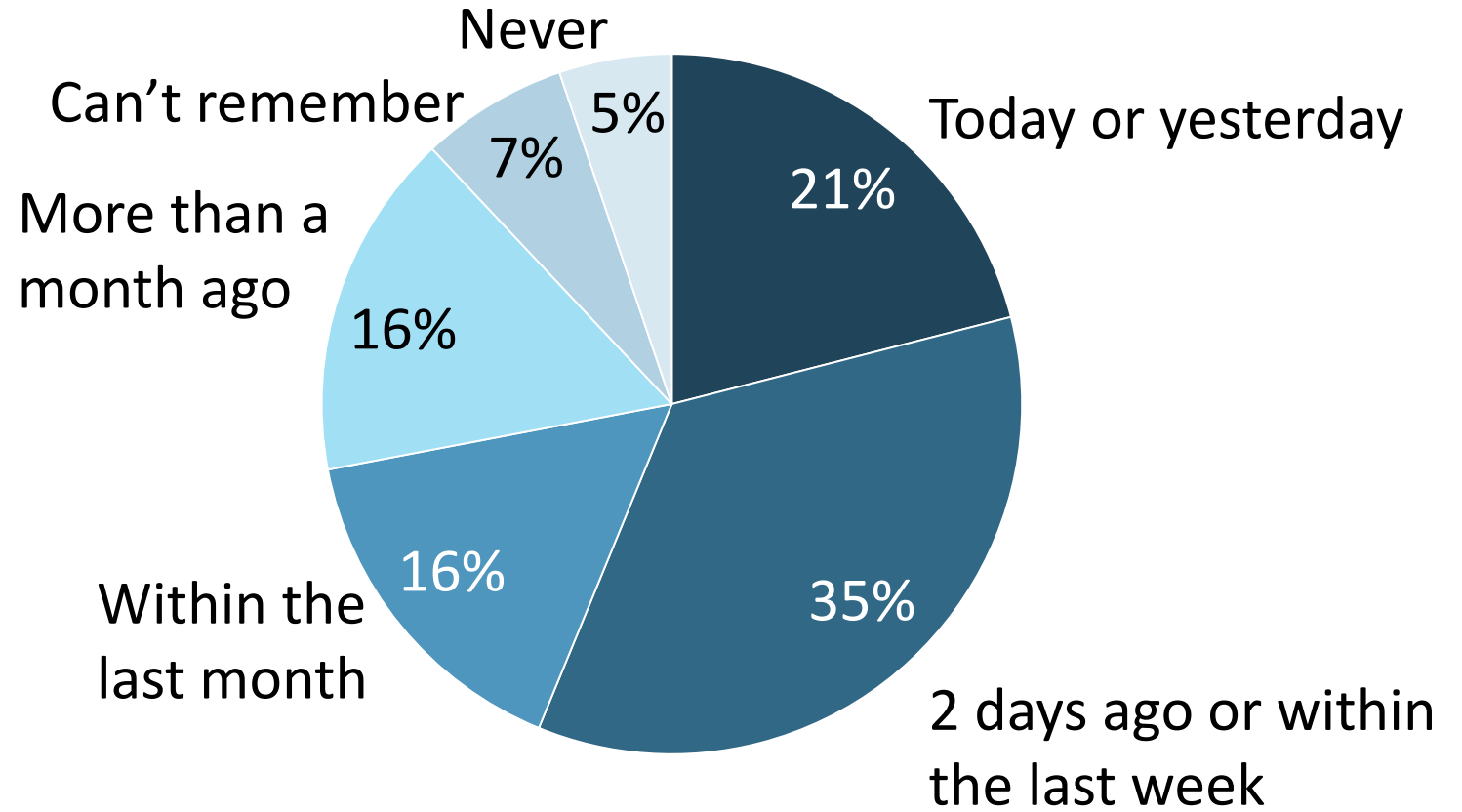
Question wording: How often do you eat each of the following either at home or in a restaurant?

Seafood Diet



Seafood Diet

Question wording: When was the last time that you ate seafood at home or at a restaurant?



Thank You.

Wen-Tsing Choi: wchoi@primegroupllc.com 240-838-9087