

APPENDIX A

*STATE OF CALIFORNIA*

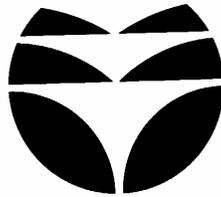
**DEPARTMENT OF FOOD AND  
AGRICULTURE**

**FOOD MARKETING AND ECONOMICS GROUP**

**FOCUS GROUPS WITH GROCERY SHOPPERS**

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**FINAL REPORT**



**JD FRANZ RESEARCH, INC.**  
**Public Opinion and Marketing Research**

**Jennifer D. Franz, Ph.D.**

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# I. INTRODUCTION

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The research results presented in this report derive from two focus groups that were commissioned by the State of California's Department of Food and Agriculture and conducted by JD Franz Research, Inc., of Sacramento in consultation with the Food Marketing and Economics Group of Davis. Held at Nichols Research in Concord and Consumer Pulse in Redondo Beach, the groups took place on August 16 and 17, 2000, respectively.

Both groups consisted of primary grocery shoppers, all of whom were women. Ten people participated in each group. All participants had to have purchased fresh salmon to prepare at home at least three times in the preceding six months. Beyond this criterion, recruitment was designed to emphasize well-educated individuals with above-average incomes, although this was not universally the result. A mix of ages was also sought, and this was generally achieved. Finally, recent focus group participants, those with extreme views, and people working in advertising, marketing, public relations, marketing research, the grocery business, the fishing industry, or organizations that deal with streams, rivers, or the ocean were screened out.

The primary purpose of the groups was to determine how to promote wild California King salmon. Specific areas of inquiry included the following:

- Reasons for cooking and eating fresh fish at home
- Frequency of preparing fresh fish
- Frequency of preparing fresh salmon at home
- Whether the frequency of preparation varies by season
- Reasons for preparing fresh salmon
- Preparation methods
- What people like about preparing fresh salmon
- What people dislike about preparing fresh salmon
- Where fresh salmon is bought
- Where people would like to be able to buy it
- Awareness of Omega 3 fatty acids and their benefits
- Awareness of where salmon is caught
- Awareness that salmon is caught off the California coast
- Familiarity with and impact of the California salmon season
- Awareness of various types of salmon
- Impressions of various types of salmon
- Familiarity with the difference between wild and farmed salmon
- Preferences for wild versus farmed salmon without and with descriptions

- Familiarity with and effect of how salmon is caught
- How fresh wild salmon should be labeled
- Whether or not over-fishing is an issue
- Impact of certification relative to over-fishing
- Credibility of various potential certification organizations
- Whether there is an analogy to free-range chicken
- Preferences among various potential salmon purchases
- Willingness to purchase wild salmon frozen at sea
- Willingness to pay more for wild salmon

Following this Introduction, the report is divided into two additional sections. **Section II** presents the **Findings** from the focus groups, and **Section III** presents the research firm's **Conclusions and Recommendations**.

For reference, there are also two appendices. **Appendix A** contains a copy of the **Screening Questionnaire** that was used to recruit participants, and **Appendix B** includes the **Moderator's Outline** that was used in guiding the groups' discussions.

Because this research was qualitative rather than quantitative, it is not possible to generalize the results beyond those who participated. Thus although the report contains conclusions and recommendations, these should be viewed as being tentative

and subject to confirmation or disconfirmation through quantitative research rather than definitive.

## II. FINDINGS

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Findings from the focus groups are presented here in the same order as the questions were posed to participants. Readers who are interested in the details of the groups' structuring are invited to consult the copy of the moderator's outline that can be found in Appendix B.

## Why Do You Cook and Eat Fish at Home?

In both groups, participants said they cook and eat fish at home because it is easy, quick, tasty, light, healthy, and a refreshing change from chicken as the following remarks illustrate:

### *Group 1*

- It tastes good and there are lots of different ways to prepare it. It's good for you.
- I like seafood and it's fast.
- Healthy and balanced in the chain of proteins and things like that.
- And it's light, instead of eating pork or beef.
- It's a nice change from chicken.

### *Group 2*

- I think it's easy, quick, and it's good for you.
- It's tasty.
- I know what goes in it when I cook it. I know it's fresh.
- It tastes better than in restaurants.
- Nutritious.
- It's healthy for my family.
- I get tired of chicken.

## How Often Do You Have Fish at Home?

In the first group, the most prevalent answer to this question was once or twice a week, although there were some who served fish less often. Participants in the second group were inclined to say they have fish at least once a week. The following comments are illustrative:

### *Group 1*

- Once a week at least. (Several agree.)
- About twice a week at least.
- It fluctuates. Once a month or every couple months or sometimes twice a week. It depends what mood I'm in.
- I'm not that regular, like not once a week; maybe once every two weeks or once every three weeks.
- We eat more in the summer when we eat outdoors, to grill. (Several agree.)
- It smells better cooking outside than in.

### *Group 2*

- At least once a week. (Several agree.)
- **Moderator:** Anybody less often than once a week?
- No.
- Anybody more often than once a week?
- Sometimes.

## How Often Do You Have Salmon at Home?

In the first group, salmon was the preferred fish of most and the fish most likely to be served. In the second group, about half preferred salmon. Although some had it less frequently, having salmon one or twice a week was common.

Reasons for preferring this fish included the ease of fixing it, its versatility, its taste, its color, its health benefits, and its strength for barbecuing purposes. In the second group, however, there was some concern about how fresh the fish is certain times of year.

These conversations proceeded as follows:

### *Group 1*

- That's the most often.
- About three times in six months probably.
- It's great barbecued. (Several agree.)
- I had salmon last night and the night before.
- I bought some yesterday.
- A couple times a month.
- Once or twice a month.
- Three or four times a month.
- Moderator: And most of you said it's your preferred fish?
- Yes. (Several.)
- It's not my preferred. I like sole.

- Sole and salmon.
- Salmon is just so easy I think, especially now when you can buy it at Costco, like the long thing.
- The whole salmon.
- Yeah. And then you freeze it in sections, so you take a section out at a time.
- I'll have to try that.
- You can't really ruin a salmon either.
- It's good poached, it's good barbecued, it's good sautéed. There are a lot of ways to fix it.
- I think a lot of people fail to mention that it has a pretty color.
- It's aesthetically cool.
- Yeah, and it's thick.
- It's also a good source of Omega 3 fatty acids, so it's one of the healthier. It's a fattier fish, but it's a healthy choice.

*Group 2*

- Once a week.
- That's my favorite.
- Yeah, mine too.
- Mine too.
- It's one that's fresh and nutritious, but I don't know if it's fresh, so I'm leery sometimes.
- More often than once a week, anybody?
- How about twice a month for me.

- I'd say twice a month.
- Yeah.
- I'd eat it three times a week if I knew it was fresh.
- Now it's usually once or twice a week.
- It's versatile.
- You can barbecue it and it doesn't fall apart.
- It's strong, yeah.
- My family likes it.
- It's pink.

### **Do You Eat Salmon Year-Round or Seasonally?**

In both groups, participants said there was no seasonality to their selection of salmon.

One participant in each group did note, however, that there are times when the fish seems more abundant:

#### *Group 1*

- Year round. (Many.)
- But more when it's in season. When the price is good and when the salmon are running, it is around here. I don't know if you're from around here.
- I think it's after Christmas, and the price is really good. And we can get it fresh, not previously frozen, which most of the things are in the supermarket - previously frozen.

## *Group 2*

- Pretty year round for me.
- When the mood strikes or I need something different.
- Year round. (Many.)
- Sometimes; I'm different. Like I said before, it depends on when. Sometimes the grocery stores have a lot more salmon, and I guess that's seasonal; I don't know what time of year it is, but it seems it shows up more around here, the fresh. They say it's fresh and you see a lot more of it and the price comes down, and then it'll go back to the regular.

### **Are You Aware of the Omega 3 Fatty Acids in Salmon?**

Although this topic was supposed to be discussed later on in the conversation, one of the participants in the first group mentioned the Omega 3 fatty acids in salmon at this point. When the moderator probed further, four members of the group said they were aware of this health benefit before it was mentioned. In the second group, which took up the topic at the prescribed time, almost everyone was aware of it.

### **How Do You Fix Salmon?**

Grilling or barbecuing salmon seemed to be the preferred preparation method in both groups. Both also mentioned broiling and baking, however. In addition, one person in the first group said she makes a fresh salmon mousse, and one in the second group said she makes salmon tacos. This discussion evolved as follows:

## *Group 1*

- **Moderator:** I've heard you grill it. With or without a marinade?
- Without.
- Usually without.
- Both ways. (Several.)
- I poach it in milk.
- Lemon butter.
- I bake it with tomato and onions.
- I make a fresh salmon mousse for an appetizer. It's really good.

*Group 2*

- How do you fix it? I heard barbecuing.
- Grill it.
- Broil it. (Several.)
- Bake it.
- Poach it.
- Tacos.
- Garlic and olive oil.
- Garlic and butter.
- My kids like an oriental sesame oil, soy sauce, ginger, garlic, green onion type stuff.
- Mine is so boring. All I do is with butter and seasoned salt and lemon, that's it.
- I've learned to broil it, but I spread honey over the top of it and sprinkle garlic on that and broil it, and it keeps all the juice in; it's really good.

## What Do You Like About Preparing Salmon?

Participants in the first group said what they like about preparing salmon is that it look pretty, doesn't have a strong smell, and is hearty. In the second group, participants mentioned that it is quick, easy, versatile, not fishy, and tasty:

### *Group 1*

- **Moderator:** What do you like about preparing it? It's easy. Somebody said it's hard to ruin it. What else do you like about fixing salmon?
- It looks appetizing when it's completed.
- I always prepare it with fresh lemon slices on top, and it just looks pretty. It makes a nice dish to serve.
- It doesn't have as strong a smell. If you're cooking it inside, it doesn't stink up the whole house.
- I agree.
- I hadn't thought about it before somebody said it, but it seems like a really hearty meal over some of the other fish. It's satisfying.
- Just by sight.

### *Group 2*

- It's quick, it's easy, it's versatile, and it's like the recipe, 30 minutes or less and you're on the table.
- It's not real fishy.
- Tasty.

## What Don't You Like About Preparing Salmon?

Both groups initially mentioned the smell in response to this question. Participants in the first group also said they wanted more recipes; in the second group, they said they didn't like filleting the fish, the skin, and the "gray stuff" between the flesh and the skin:

### *Group 1*

- The smell.
- I've seen it and I've had it at restaurants blackened and so I went online and I think I came up with one recipe, and it was like, okay, that doesn't sound that great. It's just recipes I think. The time I cooked salmon, I kind of came up with something on my own.
- **Moderator:** You'd like some different or more recipes. Is anybody else looking for recipes, or are you happy with the way you're doing it?
- I'd like more. (Several.)
- Anything else you don't like about fixing salmon?
- No. (Several.)

### *Group 2*

- I just don't like the smell of it. I can eat it, but I don't like the smell of it.
- I don't like filleting it.
- Uuuuh! I don't do that.
- I take all the skin off.
- Wow!

- I don't like the black skin either.
- That's what I was going to say, the old burnt skin left over in the pan.
- Or that gray section that's in it.
- Oh yeah.

### **Where Do You Buy Salmon?**

In both groups, participants were most likely to say they buy their salmon at Costco.

Other sources included the supermarket and, for some, a fish market:

#### *Group 1*

- Costco. (Several.)
- I buy it at the grocery store.
- Fish market. (Several.)
- I buy it other places but 90% of the time it's at Costco.
- It's at Costco most of the time.
- They have the great salmon and at a great price.
- Plus, it's the whole thing, so it's easy to make three meals out of one fish.
- Safeway, Albertson's.
- Supermarket.
- Safeway.
- Safeway since they're close to me.

### *Group 2*

- Fish market.
- Costco.
- Yeah, Costco is a good place.
- Costco.
- Sam's Grocery Store.
- Bond's.
- Fish market. Down in Redondo Beach.
- Yeah. I used to buy it in the grocery store, but I heard some funny stories about buying fish at the grocery store; so now I only go to the fish market. I just heard that it's not fresh. Maybe that's a nasty rumor, but I believed it.
- I heard that too.

### **Where Else Would You Like to Be Able to Buy Salmon?**

In the first group, there was a desire for fish markets that would have salmon. In the second group, the only answer to this question was McDonald's:

### *Group 1*

- No. (Several.)
- I would like to have more fresh fish markets to buy it at. (Several agree.)
- That would be nice.
- Like rather than the grocery store.
- I would definitely go.

### *Group 2*

- McDonald's.
- Salmon burger.
- Try to convince the kids of that one.

### **Where Is Salmon Caught in the United States?**

Participants in both groups mentioned Alaska and Washington or Seattle. In addition, one member of the first group said they had caught salmon in Lake Tahoe, and another said they had had it caught in Vancouver. Finally, two members of the second group mentioned farms on the east coast:

### *Group 1*

- Alaska.
- I don't know.
- We caught one in Lake Tahoe.
- Seattle.
- Vancouver, because I went there and had salmon like I've never tasted here.

### *Group 2*

- Alaska.
- Washington.
- Seattle.
- Fish farms, on the East Coast somewhere.

- Massachusetts.
- I don't know.

### **Did You Know That Salmon Is Caught off the California Coast?**

In both groups, the simple answer to this question is no, not really.'

### **Do You Know What the Season Is for California Salmon?**

In the first group, participants either guessed at the season or said they had no idea:

- No idea. (Several.)
- Spring.
- July.
- January - February.
- I don't know.

No one in the second group had any idea what the season might be. Finally, neither group said that knowing the season would change their impression of California salmon.

## What Kinds of Salmon Can You Name?

In both groups, participants mentioned a few types of salmon but became lost fairly rapidly. Interestingly, both also mentioned “silver something” without being able to name the something. These conversations proceeded as follows:

### *Group 1*

- Sockeye.
- Sugar.
- King.
- Copper River.
- Alaskan.
- Is there a King salmon?
- Yeah.
- What is silver something? Isn't there a silver something salmon?

### *Group 2*

- Sockeye.
- Coho.
- California.
- It's not called California.
- Isn't there silver salmon, silver something salmon?

## What About Atlantic Salmon?

About half of the first group and a few members of the second group said they had seen Atlantic Salmon where they shop, and several members of the first group thought they had. No one was sure whether they had purchased it, however. Impressions of this type of salmon were generally positive, although there was some concern about freshness given the distance from the east coast, as follows:

### *Group 1*

- It sounds kind of far away, and if I'm going to eat it, it's probably not going to be fresh.
- I think I'd want to try it because I think I would rather have the medium pink rather than the darker.
- I agree with you on that.
- I would definitely try it if I knew where to buy it.
- And I may have; I just don't remember if I ever have.
- I agree with what was just said; I like the lighter.
- I wouldn't buy it. To me medium pink would be tastier than a lighter pink, as far as the taste; and that's the way I would look at it.
- I had it in Norway and that's the best salmon I ever had; so if I saw it, I'd buy it, now that I realize what it is. I always wondered if that was a different salmon and why was this so good.

### *Group 2*

- I don't know about the Atlantic Ocean. I'm just not sure.
- It's cold.

- Chile is not in the Atlantic.
- I think that's all we see in the stores, isn't it? At least that's the only one that I've noticed.
- I would eat it.
- I would eat it.
- Because I like salmon. I don't care where it came from.
- I don't think there's anything there either that sounds offensive to me. It sounds fine.
- They usually don't tell you where it's actually coming from though. They might say it's Atlantic salmon, but I've never seen it say, this came from Chile.
- And to me, the farther away it's coming from, the less fresh it seems to me. So I'm thinking of all the packaging and then in and out of hot and cold and hot and cold, and you kind of wonder what you're getting.

### **What About Silverbrite Salmon?**

Only one person, in the first group, said she had seen Silverbrite Salmon, and that was on the table in her father's house. (Her father was a fisherman.) Clearly, no one recalled having purchased it. The other names of this fish (Chum, Dog) were enough to make it unattractive; some in the second group also expressed concern about our distance from Japan, although one in the same group thought Japanese fish might be flash frozen. These discussions evolved as follows:

#### *Group 1*

- I think it's the Dog Salmon name that's turned me off.

- Or the Chum.
- If it's listed it as Chum Salmon, I don't think I would buy it.
- But it was very good and it looked good when I ate it.
- **Moderator:** But the name doesn't help it?
- No. (Several.)

### *Group 2*

- This sounds not up to... The Chum, you know this is what they use to catch the salmon. This is bait. That's Dog Salmon, Chum Salmon, it just doesn't sound good. (Another person agrees.)
- I like it coming from Japan though for some reason.
- And I don't. I don't like Japan. (Many)
- Japan to me, they freeze it very quickly, just like Alaska, and ship it immediately.
- I think it's too far away.
- The same thing, too far away.
- Dog sounds like dog food.
- I don't think Dog is a good marketing term.

### **What About King Salmon?**

Many participants in both groups said they had seen this type of fish where they shop and had also purchased it. Reactions to King Salmon were universally favorable, as follows:

### *Group 1*

- I would buy it. (Several.)
- I love it.
- I've bought it and it's very good.
- **Moderator:** It sounds unanimous. Any dissent?
- Well, just from the description it sounds good.

### *Group 2*

- I like King Salmon.
- It sounds good to me.
- I think that's a great salmon because I know somebody that ships it in from Alaska. They go catch it and then ship it. It's so good.
- Yeah, that seems like the Cadillac of the salmon family.
- I was just thinking of the nice dark pink color, and King Salmon sounds good.
- It sounds fresh.
- The water has got to be really clean up there. I guess it's too cold for anything else to grow there.

### **What About Sockeye Salmon?**

Neither group expressed any familiarity with this type of salmon until someone mentioned that it is the type that is canned. Following this, reactions were generally favorable, although there were some in the first group who would prefer a lighter a color and there was one in the second group who wondered if it is fishy. The following remarks capture these discussions:

## Group 1

- **Moderator:** What's that kind of fish that always comes in the cans, the salmon?
- That's Sockeye Salmon.
- Its just salmon.
- That's real light pink.
- It would be Sockeye I think.
- Well, that's what it says; it says Sockeye.
- And I believe that's what probably a lot of the smoked salmon is, that they use for lox and that kind of thing.
- Well, I know it's the canned salmon because I remember seeing Sockeye on it.
- I would try it. (Several.)
- I would try it since it is very good in the canned salmon; so if it tastes that good in canned salmon, I would imagine that it would be good in fresh salmon.
- If it was that good in a can, then imagine what it would be like fresh.
- Yeah, I wouldn't buy it unless I'm familiar with the name, and I would try it.
- I don't think I would. I like kind of the regular standard, so I probably wouldn't even try it.
- **Moderator:** And the regular standard would be?
- Probably the King. I don't think the dark red would appeal to me to try it.
- **Moderator:** Because of the color?
- Probably.

- That's the same with me. I never heard of it. I'd maybe try it one time but I would stick with what I know.
- I think if I saw the dark red I might wonder if there's something wrong with it.
- Actually, I might think that too, that it's not fresh or something.

*Group 2*

- Never heard of it.
- Is that in a can?
- Yeah, I've seen it in cans.
- Yeah, I have too.
- It's usually canned.
- I'd eat it. Can we talk about canned too? Is that from a can?
- I think, because I've bought that too, canned Sockeye.
- I like this, but the little white things that are in there I don't like. I love salmon, that's my favorite fish, but those little white things in the Sockeye salmon I don't like; I always take them out.
- One of my friends lived in Alaska and she told me this was the best; Sockeye is what you want.
- I've seen it on menus.
- **Moderator:** Would you be inclined to try this?
- Sure.
- Once.
- I like the dark red color.
- I think it's not really dark red though. I thought it was more dark pink.

- Well, let's call it dark dark pink.
- Okay, dark pink, not red.
- It doesn't look like steak.
- No, but you know you're eating salmon I think.
- But isn't the Sockeye a little more fishy smelling and tasting? I know one of these is a lot stronger than the other one. I think it was the Silver that wasn't very strong, as far as the fishiness.

### **What About Copper River Salmon?**

Only one participant, in the second group, had heard of Copper River Salmon, and that had been on a restaurant menu. Impressions of this fish were favorable, however, because limited availability made it sound desirable. One person in the first group also noted that it should be good because it is caught in very cold water. The following comments are illustrative:

#### *Group 1*

- I think it would be very good.
- Because it's available a very short period of time, it's very seasonal, and just generally, fish that's very seasonal is very good.
- And it's caught in real cold waters. To me that would make it better. It's frozen until you get it on your plate.
- So it doesn't spoil.

## Group 2

- I think I've seen it on a menu, like up in Mammoth.
- It looks good though. If it's only available for a limited time, that has an appeal to it; this must be good and order it now; you won't get another chance.
- **Moderator:** Several people are nodding.

### Do You Know the Difference Between Wild and Farmed Salmon?

In the first group, the answer to this question was no, although there were some interesting guesses. Several said they prefer their fish “natural,” while one was concerned about over-fishing and one wondered about toxins in the ocean, as follows:

- Farm salmon is, they have just like a designated body of water where they raise only a particular fish. It's not like out in the wilds.
- Raised specifically. And they have to be a certain weight and stuff too. Right?
- Don't know.
- Being farmed, you raise it to like a certain size and age.
- Well, maybe like you would think about chickens or something. I don't know. Chickens come in various sizes.
- It would be under very controlled circumstances. They're probably fed a certain diet I would imagine.
- I'd prefer the natural. (Several agree.)
- I think that the farmed might be less prone to having like toxins. Sometimes fish can pick up, really fatty fish, like mercury and things like that.
- Plus, they save some fish for the other creatures out in the environment as opposed to when we farm it ourselves.

When the moderator went around the room in this group to get a vote of preference, five said their choice would depend on color or on freshness, three opted for wild salmon, and two said they would prefer farmed:

- To be honest, two things - cost and what looks the best visually and what looks the most fresh.
- Color, just by touching.
- I don't know which one I'd favor. I probably would buy both and then just try them, and then make a decision on which one I liked.
- I would opt for the farmed and give it a try. Environment, just to keep some fish out for the other creatures of the world. Everybody needs to eat fish, so we need to keep some other fishes out there.
- I'd probably try the wild. If it didn't turn out right, no matter what, if it was just the individual fish or not, I just would try something else the next time. I know my husband would want it more. He's really in to the nature and the natural stuff.
- I'd try both, but I'd prefer the wild if I had my pick. I think they've used their muscles more and use their bodies more; I think that might affect the flavor.
- I probably would go by just what looked best. Mostly color, and size too. I like filleted fish, I don't like a whole fish, so that would have a lot to do with it.
- I would probably go like (Name), on price, like if one were on sale, because I don't know that I've tasted a big difference in the different salmons that I bought. Color-wise, maybe the lighter pink. And if one was fresh versus frozen - frozen, defrosted - I would probably go with the fresh.
- I probably would go with freshness first.
- I would try the wild just to see.
- I would be open to trying either, but I think I'd maybe lean toward the farmed because - well, you're not going to like this answer - but in other fish beside

salmon, I've had the farmed kind and I've had it from just being out in the natural wild environment, and the farmed kind tasted much better.

- I would go by appearance, so it really doesn't make any difference whether wild or farmed. I would go by the appearance, the way the fish looked, the plumpness, the color. If one was lighter, I wouldn't pick that one. I'd go for the darker.

In the second group, six said they were familiar with the difference, and all of these said the wild fish is firmer or tastier:

- The taste is different.
- **Moderator:** Which tastes better?
- I think wild.
- I agree.
- Yes, wild tastes better.
- I think the texture is softer also in the farmed.
- Yes, like more mushy.
- What about nutrition? Is there a difference?
- Can it be the vitamins in it? Because the fish is really full of vitamins.

### **How Do You Feel After the Difference Has Been Described?**

After participants in the first group had been given a description of the manner in which farmed salmon is raised, they unanimously said they would prefer the wild

product unless there were a significant price differential. Their reaction to the farmed fish was decidedly negative, as follows:

- I'd definitely go with the fresh.
- Yucky.
- Well, that they're fed fishmeal and fish oil and that stinks so, and they add color to them.
- Coloring added.
- Are all farmed fish that usual...
- It doesn't sound appealing.
- Well, that blows my theory then.
- Yeah.
- Exactly.

In the second group, reactions to the farmed fish following the description were also generally negative. There was one, however, who said other food products are similarly treated, one who said it would depend on price, one who wondered about ocean toxins, and one who thought purchasing farmed salmon might prevent over-fishing. This conversation proceeded as follows:

- This sounds really yucky. (Several agree.)
- Dyed fish.

- It's possible that they have been fed antibiotics if there is disease that breaks out because of the crowding and the environment.
- Uuuuuh.
- That sounds really not nice.
- Like in chicken and beef and milk and vegetables and everything else we eat.
- Now that you know this .....
- Kind of protect their environment perhaps from getting over-caught.
- I would buy the fresh fish, the wild one, because I would feel certain in my mind that it would be better for me, it would taste better and all of those things; that's it.
- One reason, after I've seen what they put in farmed salmon, I would probably buy the wild; plus, we go fishing a lot and catch trout, and the trout you catch in a lake taste much better or much firmer, like everybody was saying, than the ones that are farm raised.
- I would choose the wild, definitely. I don't think there would be near as many fat deposits in the wild one, and I think the taste would be better.
- Same with me as far as what she said, that now that I know the difference, I would pick wild because farmed doesn't sound too good.
- Well, I was honest. I think the farmed fish, there are reasons for it perhaps. I think if the prices were the same, I'd probably buy the wild salmon, but on the other season, when maybe the prices were different, I wouldn't be too frightened to buy the farmed salmon. And then a lot of the fish like that that you catch in your lakes anyway are just stocked and they're brought there from farmed trout. Maybe you've caught a lucky one that has been swimming there for awhile. A lot of them, aren't they just stocked anyway?
- I would prefer the wild as opposed to the farmed. It just seems like they're growing in their unnatural environment; they're not in their own element.
- I would choose wild. It just seems healthier.

- I'd choose wild just from experience. If they have wild, I'll buy wild. But then you kind of wonder, you know all kinds of toxins are in the ocean and stuff, so it could go either way. But if they're both exactly the same, coming from the same place, and the same price and all that stuff, the same type of salmon and everything, I'd go for the wild just because it tastes better.
- Just after reading these two little blurbs, I think that I would go with the wild as well, and I'd probably even pay more money if I had to.
- I would go for wild definitely. I wouldn't want that stuff in my fish.
- I'd take the wild also. The farmed just doesn't sound appealing at all, very unnatural.

At this point, the first group actually brought up the analogy to free range chicken.

After the moderator probed, however, it became apparent that they were relatively indifferent to the free-range product.

In the second group, which discussed this topic in the prescribed order, participants indicated that they do not purchase free-range chickens because they are not readily available where they shop. Some also noted that price is a consideration.

### **Are You Aware of Any Environmental Issues Relative to Salmon Farming?**

Nether group had heard of any environmental issues relative to salmon farming. In addition, none of the issues sounded familiar when they were mentioned.

## **Do You Have a Preference for Troll Versus Net Fishing?**

In both groups, several participants were aware of the way California salmon are caught and the difference between troll and line fishing. Although there were a few in the second group who expressed concern about other creatures being caught in nets, most felt how a fish are caught is unimportant. The following remake capture these sentiments:

### *Group 1*

- I just think a fish is a fish; it's not like it has a personality. I mean, it doesn't talk, it doesn't greet you, it doesn't bark, it doesn't meow.

### *Group 2*

- We're going to eat it anyway.
- Who cares! It's dead.

## **Is California Salmon Over-Fished?**

No one in the first group had any sense that over-fishing of California salmon is a problem. In the second group, participants thought it might be possible but they had not heard it is a problem.

## How Would You Feel About an Over-Fishing Certification?

Generally, the prospect of a certification stating that salmon comes from a fishery that is not over-fished was greeted with yawns. Both groups felt that fishing is already regulated or that over-fishing is not a problem anyway. Only one person in the first group and two people in the second group indicated that they cared at all. These discussions proceeded as follows:

### *Group 1*

- I don't feel it's necessary because you have to have a fishing license to fish, you can only keep them if they weigh so much, and you can only get so many a day. If you get caught doing other than that, they're going to put you in jail and they'll fine you big time.
- Greed will play a factor in it. It's up to the state how many fishing licenses they give out, not how many one person catches. And then it's like how many people can... Those nets, because all those things that are caught don't make it back to lay eggs.
- But do you know how many people have fishing license that never use them for a whole year and just renew them every year?
- I don't know because I'm not in Alaska and I'm not out there fishing, so I don't know how many fish are being caught or how many licenses are being issued.
- If it is an issue, I haven't heard that it is, but if it is an issue, then yes, it would make a difference to me if I saw that on a label.
- I would think it would already be regulated and we wouldn't be having it on the market.
- It would make a difference for me. It would make a difference having it; I would feel better about a label, just because. Dolphins Save Tuna, that makes a difference for me when I'm buying a can of tuna.

## Group 2

- I would buy it.
- Oh no; it's quality.
- It wouldn't matter to me. (At least three.)
- I don't think it's necessary.
- What's the question?
- Moderator: What I'm basically asking is, would it matter to you if you were in the store and you saw fish A without a label that guaranteed that it wasn't over-fishing and fish B with a label that said, this label guarantees you that this fish was caught in a manner that this particular fishery is not being over-fished, would that label matter to you or not?
- No. (Several.)
- It sounds like that one would be the wild one, the one that wasn't over-fished.
- They're all certainly going to be wild because farmed is like growing cows and chickens and potatoes; you can just keep growing more and more and more of them. You can't over-fish a fish farm; well, you could but you wouldn't
- **Moderator:** So it would make a difference, this label.
- To me it would make a difference.
- It would be a plus, but then you wonder if the label is true, what's behind it is true, because anybody can stamp a label on things and you're not guaranteed they're actually following what they've stamped on there. I hate to be like that, but it's true.
- That's true.
- That's a good point.
- The label wouldn't matter to me. There's a label on the cigarette box and they still buy them, so it wouldn't matter to me. I'm not saying I buy cigarettes; I'm just saying I don't think it would matter. It wouldn't matter to me.

- No.
- I think it would matter. It would influence me, I definitely think so.

In terms of certification agencies, were there to be one, the first group was inclined toward the World Wildlife Fund; the second was almost evenly divided between the U.S. National Fisheries Service Marine, and the World Wildlife Fund. The person in the first group who cared about certification said she would pay \$1.00 more per pound for this assurance; the two in the second group would pay \$0.50 per pound more but thought any further increment would be too much.

### **How Should We Label the Fresh Wild Product?**

Participants in the first group suggested “natural” and “healthier” before becoming fairly enthusiastic about the phrase “ocean fresh.” In the second group, participants recommended avoiding the word “California” because, as was actually clarified later on, the California ocean is not clean. Then they suggested “natural,” although one participant said the word natural is overused. They also reacted positively to the word “wild,” but they were not particularly excited by any label. These discussions proceeded as follows:

#### *Group 1*

- Natural.

- Healthier.
- **Moderator:** How many would take a closer look at it if it were natural?
- Definitely I would. (Three or four.)
- I mean, everything is natural. I think that's a little deceiving. But, yeah, maybe.
- Flavorful.
- I'd put wild and I'd show a salmon jumping out of the water with the spray around it, but I personally don't want...(Transcriptionist: Everybody laughing uproariously; can't pick up what was said.)
- Now we've got two ideas. We've got flavorful.
- Something like you know when you go into the store... I shop at health food stores where they have a lot of organic fruits and stuff like that, so a word that... You can't really say that fish is organic, but maybe something along...
- Maybe emphasize that it doesn't have antibiotics or food coloring.
- Dye free.
- Show it in its environment, a picture of it.
- Something like that, yeah.
- **Moderator:** Wild. How many people would find that appealing, attractive?
- I would.
- **Moderator:** How many people wouldn't pay the slightest attention to that? Two.
- Then we had dye free or antibiotic free or not force fed or something like that.
- That would start scaring the crap out of people.
- Something fresh. Something...I don't know.
- Fresh and flavorful.

- How about free range salmon?
- Maybe some ocean caught or something like that to indicate that it's not...
- That's a good idea.
- Yeah, that would do it. (Five agree.)
- Ocean fresh?
- Yeah, that would be a good one.
- Ocean fresh would mean wild without having to use the word wild. I like that.
- Wild sounds weird.
- Fresh, ocean fresh.

#### *Group 2*

- It was born in Alaska. If it said it was from California, I want to take that off of there and say it was born and reared and that it traveled. I don't know.
- **Moderator:** How come you don't want it to say grown up in California?
- I don't think of salmon as being California, I just don't.
- Maybe something like from the cold fresh ocean water, not off the California coast, but something...
- Maybe from deep cold water, something that is far away.
- How about salmon sensations?
- That's good too. (Several agree.)
- That could be sexy.
- **Moderator:** How about if we just said wild?
- That's good.

- That would work.
- **Moderator:** How about natural?
- Natural is a good word.
- I think it's overused though.
- Organic.
- Natural is good though.
- Guaranteed naturally fresh.
- **Moderator:** How about ocean caught?
- No.
- No good.
- Yeah, that sounds good - ocean caught. That would be alright.
- **Moderator:** Troll caught?
- No. (Many.)
- **Moderator:** Line caught?
- No. (Many.)
- **Moderator:** We haven't sold very many people around this table, have we?
- No. (Several.)
- We know that salmon when they're going upstream it's shallow water. What depth are they in the ocean? Could we call it deep water salmon? That sounds fresher. Are they?
- How about something like swimming freely?
- This is like free range chickens.

- Free range fish, free ocean fish maybe or free water.
- Deep range.
- Individually caught.
- Moderator: One suggestion that was made last night was ocean fresh. Does that appeal?
- Yes.
- Yeah, but if they're not all coming out of the ocean.
- But in California they are ocean, aren't they?

### **Which Fish Would You Pick From the List?**

In the first group, three said they would choose the Local California King Salmon Filet, and seven said they would selected the Pacific King Salmon Filet. The latter selection was preferred because it sounds good, fresh, and ocean-caught, as follows:

- Skip the farm raised. (Several agree.)
- The local, because it seems fresher. (Several agree.)
- It seems like it might be fresher.
- What seems fresher?
- The local? But that could be a local pen.
- What was the Pacific? That sounds nice.
- I like that one.

- Yeah.
- The last two. (Several.)
- Or the Alaskan one.
- **Moderator:** Pacific King or the Local California?
- Right.
- They both sound very good. (Many.)
- **Moderator:** Seven people would buy the Pacific, and three people are buying the Local California. The Pacific fans, it sounds good. Why does it sound good?
- It sounds fresh.
- Ocean.
- Because the word Pacific. It's the Pacific.
- Yeah, it's the word ocean.
- **Moderator:** Now we have the fans of Local California King Salmon Fillet. And your reasons are?
- It's local. (Two) This didn't come from the Atlantic or wherever it came from flash frozen and then landed in a cellophane wrapped thing. I've got something local and that means fresh to me.
- Fresher. Yeah, fresher.

In the second group, nine said they would choose the Alaska Salmon Filet and one said she would prefer the Pacific King Salmon Filet. Reasons for selecting the Alaskan product included taste and coming from clean water:

- **Moderator:** The Alaskan people, why is that the one you're going to pick first?
- Because I thought it always came from there. I just learned today it came from California.
- It's clean water up there. (Several agree.)
- Yeah; it tastes better.
- And it seems fresher, cleaner.
- Cleaner water.
- They do it best up there I think.
- **Moderator:** The one of you who picked Pacific King Salmon, why?
- I'm not exactly sure. I think it sounded a little bit more local, but the California Local King Salmon, I think that sounds kind of hokey. But the Pacific King Salmon sounds like it's coming from right there so it's going to be really fresh.

Second choices among the members of this group were about evenly divided between the Pacific King Salmon and the local California King Salmon Filet. Finally, most said they would not buy the Chilean Farm Raised Salmon Filet:

- **Moderator:** Those of you who picked Alaska, suppose you got to the store and they just sold the last piece of it. What would be your second choice?
- Pacific. (At least two.)
- California King. (Several.)
- I'd even try the Local California King Salmon.
- Raised right down the street.

- I'm actually not as impressed about it.
- **Moderator:** Is there anything on this list that you would not buy if you saw it in the market?
- Chilean. (Sounded unanimous.)
- It's too far away and the farmed. (Several agree.)
- The Local California King sounds like they're trying too hard.

### **Would a Flash Frozen Wild Product Be Acceptable?**

In the first group, most participants said they would prefer a fresh fish, although a few said they would consider a flash frozen product. Reactions in the second group were more mixed. The following remarks are illustrative:

#### *Group 1*

- Yes.
- No.
- What does that mean?
- And then you have a special way of defrosting it too. You're not really supposed to let it defrost. If it's flash frozen, you have to either do it in the refrigerator or cook it frozen.
- Cook it frozen?
- You have to.
- I want it fresh.
- Yeah, I want it fresh.

- I would prefer fresh, but I would buy flash frozen.
- I've never bought fish frozen. It's previously frozen, but I don't know, I don't know that I would do that.
- It depends on the fish. Now salmon I want fresh.
- Moderator: How many of you really think you'd rather have it fresh?
- Always. All fish. (Several agree.)
- **Moderator:** And how many of you think, I probably wouldn't buy it frozen at sea?
- Probably would not.
- Probably would not, yeah.
- **Moderator:** Probably would not, at least half; nobody is thrilled about it.

#### *Group 2*

- No. (Several.)
- Yes. (Several.)
- I don't know.
- I think it's fresher in the long run, because if they don't flash freeze it, it has the chance of getting too warm and getting chilled and getting warm, and I think it deteriorates; where if it's flash frozen, I think the quality is just better, even though it's flash frozen.
- I said yes because of what she said.
- Me too.
- I know that frozen fish tastes terrible. It doesn't matter, it ruins it; it just totally ruins it. It cuts down the flavor and it gets mushy and everything, and it's not the same. You can go buy it fresh and put it in your own freezer, and when you thaw it out and everything, it's just a totally different thing.

- I think they have it down to a science when they're transporting fish anyway. If you're in the fish business, you know how to transport it. I'd much rather have fresh fish than frozen.
- I just don't like these waters here, for eating something out of it; a personal opinion.

### **Would You Pay More for Wild Salmon?**

In the first group, participants said they would definitely pay \$0.50 more per pound for wild salmon, but \$1.00 per pound more would be a bit much. IN the second group, which was clearly more budget-conscious, only some were willing to pay \$0.50 more per pound. These conversations proceeded as follows:

#### *Group 1:*

- **Moderator:** Last thing. For the wild fish as opposed to the farmed fish, would you be willing to pay fifty cents a pound more.
- Definitely.
- Yes.
- For the wild?
- For the wild.
- Year. (Many.)
- I would get the ocean fresh for me.
- Yeah.
- Definitely.

- **Moderator:** How about \$1.00 a pound?
- I would.
- Moderator: Now I'm pushing it.
- Yeah. (Several.)
- If I had a taste for fish tonight, yes I would.
- And that's what they were offering you in the store?
- Yeah.

*Group 2:*

- Moderator: Would you be willing to pay fifty cents a pound more for the wild as opposed to the farmed?
- Yes. (Many.)
- Moderator: Anybody not be willing to?
- Me. Fifty cents a pound is just way too much.
- That's a lot of money, a lot more.
- That would be too much more for me.
- I don't know. I'm driven by price, budget, almost alone price.
- I agree with her, yeah. It would have to be the same price.
- Because that fifty cents a pound is a lot more.
- If somebody is on a budget and things, like most people are, price is very important.

### **III. CONCLUSIONS & RECOMMENDATIONS**

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From the results of these focus groups, it would appear that salmon is generally the most popular fish among those who prepare it fairly regularly. In addition, Pacific King salmon is both the most popular type and the most attractive when it is described. These findings alone bode well for the California fishery.

At the same time, however, people have no clear preference for the wild fish over the farmed product. Only after the methods of salmon farming are described does the tide generally turn in favor of the wild product.

While the latter finding is encouraging, it also poses somewhat of a dilemma. Using a description of salmon farming to sell wild salmon could be viewed as “using scare tactics,” “trashing the competition,” or both. Accordingly, the Salmon Council in consultation with the Food Marketing and Economics Group will need to determine how to position wild salmon as superior while not necessarily describing farmed salmon as inferior.

Another challenge the Council is confronting - perhaps, in fact, the initial challenge - is that almost no one knows that salmon are caught off the California coast. Even a

genuinely superior product will be difficult to sell if people are unaware of it, which suggests that the first step is public information and education.

Yet a further, and related, challenge concerns southern California. There, people tend to view the ocean as unclean, quite probably as an extension of unclean coastal waters. In that part of the state, then, the Council will need not only to educate people about the catch, but also to convince them that it is as safe and healthy as fish caught anywhere else.

On a more positive note, it seems clear that most people are prepared to pay a little more for the wild product if they know that it is superior. In addition, they seem to be interested in more recipes for preparation, which suggests a number of marketing tactics both in general and at the point of purchase.

In terms of marketing messages, the positive attributes of salmon include ease and speed of preparation, versatility, healthfulness, an attractive color, a good flavor, solidity, and the relative absence of a “fishy” taste or smell. IN addition, although there was no consensus about how the wild fish should be labeled, “ocean fresh,” “wild,” and “natural” seem to have enough potential to merit further testing.

Finally, we note that other possible differentiators explored during the focus groups, including certification relative to over-fishing and fishing methods, will probably have

no net positive effect. Most people do not believe the California fishery is over-fished, and most also simply believe that “a fish is a fish” in terms of how it is acquired.

# APPENDIX A

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## SCREENING QUESTIONNAIRE

# CALIFORNIA SALMON COUNCIL

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## FOCUS GROUP SCREENING QUESTIONNAIRE

USE STANDARD INTRODUCTION. YOU MAY TELL THEM THE GROUPS WILL BE ABOUT COOKING AND EATING FISH AT HOME.

1. Are you the primary grocery shopper in your household?

YES - CONTINUE

NO - ASK FOR AND TRY TO RECRUIT PRIMARY SHOPPER

2. In the past six months, how many times have you bought fresh fish to cook and eat at home?

NONE - THANK AND TERMINATE

ONE - CONTINUE

TWO - CONTINUE

THREE OR MORE - CONTINUE

3. And how many times have you bought fresh sole to cook and eat at home?\_\_\_

NOTE TO RECRUITERS: WE DO NOT CARE ABOUT THE ANSWER TO THIS QUESTION. ITS ONLY PURPOSE IS TO DISGUISE THE SPECIFIC CONTENT OF THE GROUP.

4. How about fresh salmon? (How many times in the past six months have you bought fresh salmon to cook and eat at home?)

NONE - THANK AND TERMINATE

ONE - CONTINUE

TWO - CONTINUE

THREE OR MORE - CONTINUE

5. Do you or does anyone else in your household work in advertising, marketing, public relations, or marketing research?

YES - THANK AND TERMINATE

NO - CONTINUE

6. And do you or does anyone else in your household work in the grocery business, either wholesale or retail, in the fishing industry, or in a government or nonprofit organization that deals with streams, rivers, or the ocean?

YES - THANK AND TERMINATE

NO - CONTINUE

7. Have you ever participated in a focus group or other small discussion group about products, services, or other issues?

NO - SKIP TO Q #10

YES - CONTINUE

➡ **IF YES, ASK:**

8. And were any of those discussions about grocery shopping or about cooking at home?

YES - THANK AND TERMINATE

NO - CONTINUE

➡ **IF NO, ASK:**

9. When did you last participate in such a discussion? \_\_\_\_\_

*IF LESS THAN ONE YEAR, THANK AND TERMINATE*

10. Briefly, how do you feel about cooking and eating fresh fish at home?

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IF RESPONSE IS INARTICULATE, SUGGESTS NO PARTICULAR CARING, OR EVIDENCES EXTREME VIEWS, THANK AND TERMINATE.

11. What was the highest grade you completed in school?

- LESS THAN HIGH SCHOOL
- HIGH SCHOOL
- TECHNICAL TRAINING BUT NO COLLEGE
- SOME COLLEGE
- AA/ AS DEGREE
- BA/ BS DEGREE
- POSTGRADUATE WORK OR DEGREE

NOTE: WE EXPECT THAT MOST PARTICIPANTS WILL BE WELL-EDUCATED.

12. What is your age, please? \_\_\_\_\_

- UNDER 18 - DO NOT RECRUIT
- 18 TO 24
- 25 TO 34 - RECRUIT A MIX BETWEEN 18 AND 54
- 35 TO 44
- 45 TO 54
- 55 AND OLDER - LIMIT TO NO MORE THAN TWO

13. Was your total annual household income before taxes in 1999 under or over \$30,000?

UNDER - ASK QUESTION 14

OVER - ASK QUESTION 15

☛ IF UNDER, ASK:

14. And was it under or over \$15,000?

UNDER

---

OVER

☛ IF OVER, ASK:

15. And was it under or over \$45,000?

UNDER - GO TO INVITATION

OVER - ASK QUESTION 17

☛ IF OVER, ASK:

16. Was it under or over \$60,000?

UNDER

OVER

NOTE: WE EXPECT THAT MOST WILL HAVE HIGHER INCOMES.

USE STANDARD CONCLUSION AND INVITATION.

NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

DAY PHONE: \_\_\_\_\_ EVENING PHONE: \_\_\_\_\_

# APPENDIX B

## CALIFORNIA SALMON COUNCIL

### FOCUS GROUPS WITH GROCERY SHOPPERS

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#### MODERATOR'S OUTLINE

### INTRODUCTIONS

#### *Introduce Self*

- Professional researcher
- Moderator - lead discussion
- No vested interest in outcome

#### *Introduce Topic*

- What we are going to be talking about this evening is your cooking and eating fresh fish at home
- Details soon - first talk about rules and get to know you

#### *Ground Rules*

- Audiotaping
  - Can't focus and take notes
  - Sure know what said
  - No use of tape except transcription unless permission
  - Speak up and distinctly; quiet voices
  - No talking at same time
  - Audiotape doesn't understand (nod, shake head)
- Everyone needs to participate - represent others - every opinion important
- May ask to cut short so others can talk - part of process, don't take personally
- OK not to know - don't know a legitimate opinion - not a test of knowledge
- May well disagree - more interesting that way - disagree with idea, not person

#### *Group Introductions*

- First name
- One thing interesting about self

## TOPIC INTRODUCTION

- Why do you cook and eat fresh fish at home?
- How often do you do it?
  
- How often do you cook and eat fresh salmon at home?
- Does this differ by season? Why or why not?
  
- Why do you do it?
- How do you prepare it?
  
- What do you like about preparing it?
- What do you dislike about preparing it?
  
- Where do you buy it? Why?
- Where would you like to be able to buy it? Why?
  
- Aware of Omega 3 fatty acids in salmon?
  - Aware of benefits?

## SALMON SPECIFICS

- As far as you know, where is salmon caught in the United States?
  - Did you know it is caught off the California coast?
  
- What kinds of salmon can you name?

### PROBE FOR:

- Atlantic
- Chum (Silverbrite)
- (Coho)
- King
- (Pink)
- (Sockeye)

IF AWARE, ASK:

- What is your impression of that kind of salmon? Why?
  - Have you ever seen it where you shop?
  - Have you ever prepared it?

READ BRIEF DESCRIPTIONS, ONE AT A TIME.

- Does that change your impression? Why or why not?
- What is your impression? Why?

## SALMON ISSUES

- Familiar with difference between wild and farmed salmon?
  - What is it?
  - Which do you prefer? Why?

READ DESCRIPTIONS.

- Now what is your impression?
- Familiar with the salmon season in California? (May to September)
  - Does that or would that make a difference?
- Familiar with how salmon is caught?
  - Heard of troll fishing? What is it? What is your impression?
  - Heard of net fishing? What is it? What is your impression?
- Possible issues and concerns:
  - Sustainability of commercial salmon fishing of concern? Why or why not?
  - Environmental effects of salmon farming a concern? What? Why or why not?
    - Concentrated waste?
    - Inter-breeding with wild salmon?

- Aware farmed salmon feed contains dye and antibiotics?
  - Was that a concern? Why or why not?
  - Is it a concern now? Why or why not?

## SALMON PREFERENCES

- How do you feel about the difference between free range chicken and the more standard, commercially raised chicken?
  - Attitude?
  - Purchase and consumption preference?
  - Purchase and consumption behavior?
- Does this analogy seem to fit wild versus farmed salmon?
  - Why or why not?
  - In what ways?
- Suppose you are at the store and you have the following selection.
  - Alaska Salmon Fillet
  - California King Salmon Fillet
  - Atlantic Farm Raised Salmon Fillet
  - Chilean Farm Raised Salmon Fillet
  - Pacific King Salmon Fillet
  - Local California King Salmon Fillet
- Which would you pick, and why?
  - Which would you pick if they were out of that? Why?
  - Which would you not buy at all, if any? Why?

### IF NOT CLEAR FROM THE ABOVE:

- How would you compare Alaskan salmon versus California salmon? Why?
- Would you be willing to pay 50 cents per pound more for the wild product? Why or why not?

- Would you be willing to buy California King Salmon frozen at sea when the fresh product is not available? Why or why not?

## **SALMON LABELING**

- Suppose you were in charge of selecting a label for wild California King Salmon that would be most appealing to consumers. Which of the following would you select?
  - Wild
  - Natural
  - Ocean Caught
  - Troll Caught
  - Line Caught
- Are there any other labels you would suggest?

**THANK PARTICIPANTS!**