Northern Territory Government

DEPARTMENT OF
PRIMARY INDUSTRY AND FISHERIES

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Mr Tim Watling
Committee Secretary
Senate Rural and Regional Affairs and Transport
References Committee
PO Box 6100
Parliament House
CANBERRA ACT 2600

Dear Mr Watling

Inquiry into the Current Requirements for Labelling of Seafood and Seafood Products

I refer to your letter of 27 June 2014 inviting submissions into the senate inquiry into the current seafood and seafood labelling requirements.

The Northern Territory (NT) is the only jurisdiction where seafood labelling applies at the retail level. These requirements were introduced by way of licence condition in November 2008 following extensive consultation with fish retailers, the Australian Hoteliers Association (NT Branch) and the Northern Territory Seafood Council. Fish retailers include fish and chip shops, restaurants, cafes, bistros, hotels, motels and delicatessens in supermarkets. The intent of the labelling requirements was to enable consumers to make informed seafood choices. It was also intended that the labelling requirements be simple to understand (by retailers and consumers) as well as easy and cost effective to implement.

In the NT fish retailers are required to label all seafood which has not been harvested in Australia and advertised for sale (e.g. menus, menu boards, brochures, pamphlets etc.) as 'imported'. A copy of the licence conditions are attached (refer to attachment A). Country of Origin labelling (CoOL) is not required at the retail level, although some retailers are choosing to label Australian caught seafood as consumers are willing to pay a premium for 'local' caught seafood. CoOL is a requirement of NT seafood wholesalers (known as fish trader/processors in the NT).

A Fisheries Research and Development Corporation study undertaken in 2011 looking at the success and effectiveness of the NT fish retailer labelling requirements, shows that 90% of fish retailers were fully compliant with the within three months of the introduction of the requirements. The study also showed that the labelling requirements have not reduced the range and volume of seafood available in fish retail outlets or the use of seafood as a key menu item. The study further showed that the estimated cost of complying with the labelling requirements are between $100 and $500 per retail establishment per annum. These costs are largely associated with ongoing menu changes throughout the year. I have attached a full copy of the final report for your reference (refer to attachment B).

Consumers have responded positively to seafood labelling although ongoing education is required to maintain a high level of consumer awareness, largely because of the transient nature of the Territory's population and the retail sector.

Discussions regarding the adoption of seafood labelling at a national level have been occurring for some time and I trust this information on the NT experience will assist this Inquiry.

Yours sincerely

ALISTER TRIER
Chief Executive

31 July 2014

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Fish Retailer Licence Condition – Fish Labelling.

2. ADVERTISING FISH OR AQUATIC LIFE FOR SALE

2.1 Any fish or aquatic life advertised for sale for the purpose of being consumed, and that fish or aquatic life has not been taken in Australia; it must be accompanied with a statement declaring that it is imported.

2.2 Where a mixed seafood product (i.e. a product containing 1 or more seafood products) is advertised for sale for the purpose of being consumed, and the mixed seafood product contains seafood product not taken in Australia, it must be accompanied with a statement declaring that it contains imported products.

2.3 The statement must be no less than 65% of the height of the characters used in the title of the fish, aquatic life, or mixed seafood product advertised for sale.

2.4 For the purpose of these Licence conditions, “advertised for sale” means, but is not limited to, being included on a menu, display board or pamphlet.

FRDC Project No. 2009/216

Tracking the impacts on seafood consumption at dining venues arising from the Northern Territory's seafood labelling laws.

Chris Calogeras, Suzanne Morgan,
Katherine Sarneckis, Leonie Cooper and T. Y. Lee

June 2011

NORTHERN TERRITORY Seafood Council
WORKING TODAY FOR A SUSTAINABLE TOMORROW

Australian Government
Fisheries Research and Development Corporation

Northern Territory Government

C-AID CONSULTANTS

Final Report

Seafood labelling requirements introduced by the Northern Territory Government in 2008 require fish retailers advertising seafood for sale to the public to clearly label that seafood is imported if it has not been caught in Australia.

Fish retailers include restaurants, cafés, take away stores and fish and chip shops. The NT is the only jurisdiction in Australia that requires the food service sector to label its seafood.

Before the project the impacts of these labelling requirements on fish retailer business practices, food sales as well as consumer choice and purchasing were largely unknown.

Fisheries Research and Development Corporation

Tracking the impacts on seafood consumption at dining venues arising from the Northern Territory's seafood labelling laws.

Chris Calogeras[1], Suzanne Morgan, Katherine Sarneckis[2], Leonie Cooper, T.Y. Lee

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GLOSSARY

Acronym	Description
ACFNT	Australian Culinary Federation (NT Branch)
AFANT	Amateur Fishermens Association of the Northern Territory
ANZFSC	Australia New Zealand Food Standard Code
CDU	Charles Darwin University
CoOL	Country of Origin Labelling
DoR	Department of Resources
DRDPIFR	Department of Regional Development, Primary Industry, Fisheries and Resources
FRDC	Fisheries Research and Development Corporation
NSIA	National Seafood Industry Alliance
NT	Northern Territory
NTG	Northern Territory Government
NTSC	Northern Territory Seafood Council
NZ	New Zealand
SPSS	Statistical Package for the Social Sciences

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ACKNOWLEDGMENTS

The authors wish to acknowledge the financial support for this project from the Australian Government through FRDC, Tactical Research Fund.

This project could not have taken place if the various associations, groups, councils and individuals had not provided their valuable time, input and effort to the project. To all the participants who undertook surveys, in particular the Food Service Businesses and Seafood Retailers, their input was invaluable and critical to the success of this project;

- The Beachfront Hotel
- Buzz Cafe
- Captains Seafood Takeaway
- Casuarina All Sports Club
- Char Restaurant @ Admiralty
- The Chip and Fish Bar
- Stokes Hill Wharf Eateries – (Choong Enterprises)
- Red Salt – Crowne Plaza Darwin
- Darwin Fishermen's Wharf Eatery
- Darwin Trailer Boat Club
- Hanuman Restaurant Darwin
- Loong Fong Seafood Restaurant – Darwin Airport Inn
- Moorish Café
- Nightcliff Fish & Chips
- The Noodle House Mitchell Street
- Shenanigans Irish Pub
- Il Piatto – SKYCITY Darwin
- Tasty House
- Tim's Surf 'N' Turf
- Tree Top Restaurant – Mirambeena Resort Darwin
- Darwin Fish Market
- Mr Barra
- Fish NT
- Neptune's Warehouse
- Mr Prawn.

The support from the following organisations enabled the project to be undertaken;

- Department of Resources
- Tourism Top End
- Darwin City Council

Special thanks to Ms Toni Crookes, Mr John (Mac') Maccartie of DoR and Mr Irawan of the NTSC for their ongoing enthusiasm.

Suzanne Morgan's work on the surveys and Valerie Smith assistance in developing the questionnaires and analysis of data were critical to the success of this project.

NT Consumers require more information and education about Seafood labelling laws.

Danny Yuen, Tasty House

OVERVIEW

1. NON-TECHNICAL SUMMARY

Tracking the impacts on seafood consumption at dining venues arising from the Northern Territory's seafood labelling laws.

Project No. 2009/216

PRINCIPAL INVESTIGATOR:
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1.1 OBJECTIVES

1. Quantify the quantity and origin of seafood sold in a range of food service outlet establishments in the Darwin region
2. Monitor the impact of fish retailer labelling requirements along the supply chain within the Darwin region
3. Identify any impacts of the labelling requirements on consumer choice
4. Provide advice to Department of Resources[1] (DoR) on the impact, operation and implementation of new labelling requirements.

1.2 OUTCOMES ACHIEVED TO DATE

The project has delivered the following outcomes;

- A better understanding of the trends, quantity and origin of seafood usage in Darwin
- An understanding of the impacts of seafood labelling requirements on fish retailers
- Increased awareness of the impact of labelling on consumer choice
- Increased awareness of seafood labelling requirements by the public and food service sector
- A targeted training program within the seafood component of the Charles Darwin University (CDU) Commercial Cookery course
- Production and distribution of magnets to fish retailers which articulate the seafood labelling requirements
- Enhanced communication between industry, seafood wholesalers and fish retailers
- The provision of advice to the DoR on the impacts of the seafood labelling laws
- The Northern Territory Seafood Council (NTSC) and DoR being recognised as a leader in providing first hand insight into the application of extended seafood labelling laws with regard to product origin.

1.3 KEYWORDS

Country of Origin Labelling (CoOL), seafood labelling requirements, food service sector, consumers, restaurants, seafood consumption, supply chain, compliance, surveys.

1 Formerly the Department of Regional Development, Primary Industry, Fisheries and Resources.

2. EXECUTIVE SUMMARY

On 11 November 2008, the Northern Territory Government (NTG) put in place legal requirements for licensed fish retailers, advertising seafood for sale to the public for consumption, to label that the seafood is imported if it has not been harvested in Australia. These requirements applied to all venues selling seafood to the public for consumption. These laws were brought into effect as it was considered that they would assist consumers to make informed seafood choices.

The Northern Territory (NT) was the first Australian jurisdiction to implement such laws so far along the supply chain. In all other Australian jurisdictions seafood labelling laws cease at the back door of food outlets, leaving consumers unable, in many instances, to readily determine if the seafood in their meals is imported or harvested in Australia.

The NT fish retailer seafood labelling laws had been in place for 16 months when this project commenced and the project's aims were to formally measure the impact the labelling laws were having along the supply chain, and whether the labelling laws had lead to changes in seafood purchasing behaviour at a food supply level, as well as with consumers.

The information obtained through this project was designed to specifically assist the NT seafood industry and NTG to assess the impacts of the current labelling laws, and to provide information to other Australian jurisdictions who may be considering a similar approach to labelling.

The project methodology used a quantitative approach involving face-to-face surveys of two specific groups; Food Service Sector Venues (pubs/clubs, cafes/restaurants and takeaways) and Consumers. This was achieved through 5 waves of surveys over a 12 month period, to take into account Darwin's distinct seasonal activity based around the tourism industry and local fishing fleet activity.

The survey results demonstrated a high level of consumer support for seafood labelling laws that identify imported seafood. They also highlighted supply chain challenges and opportunities for the seafood industry and food service sector, plus a number of issues in respect to the impacts the labelling laws had on the food service sector and consumers which are discussed briefly below.

The survey showed that the source of seafood has not changed dramatically as a result of the labelling laws, but there has been a drop in the use of imported product provided by seafood wholesale suppliers to fish retailers.

The laws are generally supported by both the food service sector and consumers although there was a degree of confusion as to what the labelling laws involved, and a general lack of awareness that the legislation was in place. This confusion is brought about when seafood is unlabelled, therefore resulting in consumers being unable to determine where the seafood comes from. This may have been an issue before the legislation came into force but the labelling laws do not stipulate that all seafood should be labelled, therefore leaving an avenue for this confusion to continue. Subsequently there is a greater reliance on ongoing education to explain the laws to the relatively transient population of the NT and the large number of tourists visiting the NT. A possible solution would be to legislate that all product is labelled as Australian or imported, thereby simplifying the education process for consumers (i.e. if everything was labelled this doubt would be removed).

The surveys also showed that labelling laws influence consumer choice, and it was rated as a key decision factor - simple concise labelling would ensure the relevant information is provided. The influence of tourism activity on menus generally lead to an increase in volume of seafood sales, and this increase was covered by a combination of imported and Australian product.

The cost for the food service sector of implementing and complying with the legislation was generally not significant. Businesses appeared to adjust quickly, with the vast majority being in a position to comply with the legislation within a month of its implementation. Major concerns from this sector related to having to update and change menus/ special boards due to supply issues with 'local' product, and the need for the ongoing training of staff. The food service sector in Darwin has a considerable staff turnover and consequently, knowledge of labelling laws tended to be frequently lost to the organisation, therefore necessitating ongoing and proactive education programs.

The NTG Fish Retailer licensing system provided an extremely useful mechanism for making initial contact with the food sector participants in the project.

The consumer survey showed that after freshness, country of origin is the second most influential factor for consumers when choosing seafood for a meal. Survey results also showed that consumers are willing to pay a premium for seafood labelled 'local'. Although general awareness was low, 82% of respondents indicated that an understanding of the NT Seafood Labelling laws would significantly influence their choice of seafood purchase. This reiterates the value of having labelling laws clearly and consistently detailed at the point of sale.

The survey also highlighted some areas that need further work, such as understanding the seafood supply chain better so as to improve access to local species, understanding the current barriers, and understanding the drivers for choice from a purchase perspective.

It is vital for the industry that labelling be applied to all products the correct way to protect the consumer. Good seafood product labelling provides complete and accurate information about the origin of the product, allowing consumers and retailers to make informed choices about buying local or imported products. Failure to do so will question the integrity of local industry and may be damaging to tourism. In my opinion, putting in place a compulsory seafood labelling law will ultimately gain trust from consumers and prevent any negative impacts in our food industry.

Karl Ewald, Executive Chef,
Skycity Casino

3. BACKGROUND

Establishments in the NT that sell seafood to the public for consumption (including fish retailers) must hold a licence issued in accordance with the NT *Fisheries Act (2008)*.

On 11 November 2008, the NTG put in place legal requirements for fish retailers, advertising seafood for sale to the public for consumption, to label seafood is imported if it has not been harvested in Australia. This legislative change was strongly supported by the NTSC and the Amateur Fishermens Association of the Northern Territory (AFANT). These requirements apply to hotels, clubs, restaurants, cafes or takeaway venues etc. selling seafood to the public for consumption. These laws were put in place as it was considered that the labelling requirements would assist consumers in making informed seafood choices.

The NT is the first Australian jurisdiction to implement such laws so far along the supply chain. Seafood labelling laws in all other Australian jurisdictions cease at the back door of food outlets, leaving consumers unable, in many instances, to readily determine if the seafood in their meals is harvested in Australia, or is imported.

As recently highlighted in a national review of food labelling law and policy, *Labelling Logic - the Final Report of the Review of Food Labelling Law and Policy* (Department of Health and Ageing, 2011*)*, it was identified that food labels are an intensely complex area but are highly valued as a communication option for healthy choices and consumer value information. The report noted that food labelling has four areas of consideration, food safety, preventative health, new technologies and also consumer values. Consumer values relates to consumers' personal values and allows them to make decisions that take into account animal welfare issues, religious beliefs, environmental issues, human rights and Country of Origin.

The NT fish retailer seafood labelling laws (referred to throughout this report as the 'labelling laws') had been in place for 16 months when this project commenced. The NTSC identified the need to formally measure the impact the labelling laws were having along the supply chain (i.e. from harvest to the consumer). There was also a need to understand whether the seafood labelling laws had lead to changes in seafood purchasing behaviour at a food supply level, as well as with consumers.

3.1 COUNTRY OF ORIGIN LABELLING LEGISLATION (CoOL) – NATIONAL

The Australia New Zealand Food Standard (ANZFS) Code (the "Code") contains standards to regulate food sold in Australia and New Zealand (NZ). The Standards in the Code are incorporated into State, Territory and NZ legislation. Standard 1.2.11 sets out the requirements for CoOL of packaged and certain unpackaged fish, fruit and vegetables and pork. It does not apply to food sold to the public by restaurants, canteens, schools, caterers or self-catering institutions or catering packs.

CoOL requirements apply to wholesale food establishments and NT Fish Trader/Processors fall into this category. However, CoOL does not apply to NT Fish Retailers (i.e. they are exempt in the CoOL standard). Figure 1 is a simplified NT supply chain diagram showing labelling requirements.

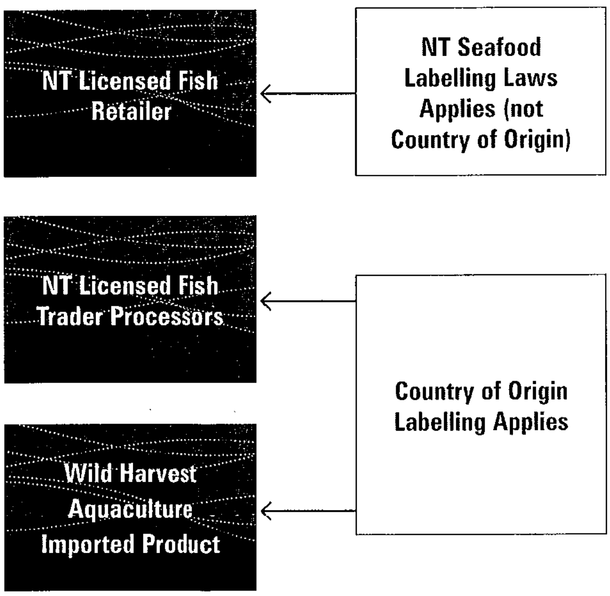


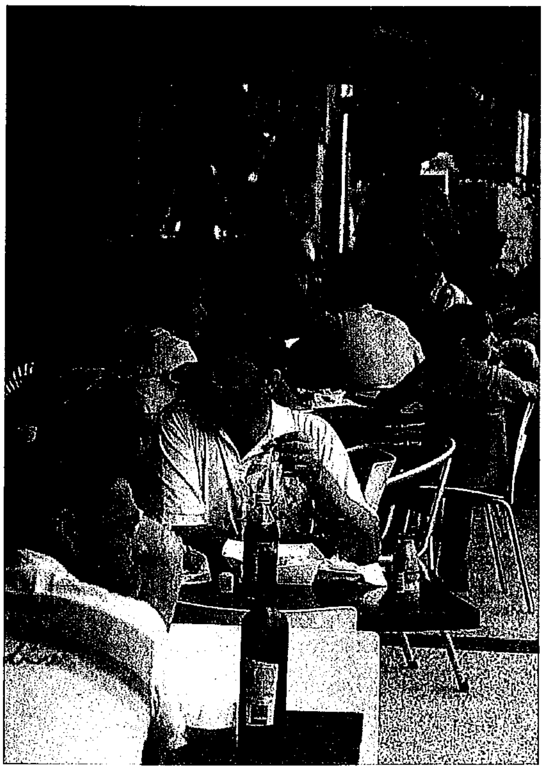
Figure 1: A simplified NT supply chain diagram showing labelling requirements

The ANZFS were developed to provide more effective and nationally uniform food safety legislation for Australia. Commonwealth, State and Territory Governments of Australia are currently implementing the Standards.

CoOL provides consumers with information as to where the food they are buying comes from, helps avoid misleading labelling for certain food products and can assist consumers to make informed decisions about what they buy.

3.2 GENERAL SEAFOOD LABELLING LEGISLATION – NT

Establishments in the NT that sell seafood to the public for consumption (fish retailers) must hold a licence issued under the NT *Fisheries Act*. However, establishments that only sell processed fish imported into the NT, packaged for sale to a final consumer and marked with the State, Territory or country from which the fish originated (such as sandwich bars and major fast food outlets), are not required to hold a fish retailer licence. Examples of this are tinned tuna, crumbed or battered prawns, fish, or seafood nuggets.



Prior to the seafood labelling laws being introduced, there was no legislative requirement for Fish Retailers that sold imported seafood in the NT to label the origin of their seafood. The way the legislation was drafted meant that a number of establishments that sold imported seafood in the NT, specifically in respect to species such as barramundi and prawns, for which the NT is synonymous, were not required to hold a fish retailer licence or to state on menu boards or menus any information about the origin of the seafood.

The NTG introduced labelling laws in 2008 to enable consumers to make informed choices about whether the seafood they are buying was imported or Australian. These laws were introduced as a condition on fish retailer licences (see Appendix IV).

The effect of the seafood labelling laws for fish retailers is to extend the labelling requirements further along the supply chain all the way to the "plate" rather than just to the back door of a retail establishment.

3.3 AQUACULTURE LABELLING LEGISLATION – NT

Aquaculture product in the NT is also subject to labelling requirements as all aquaculture licensees, fish/trader processors and fish retailers are required to label seafood accordingly. All seafood leaving an aquaculture facility must be accompanied with a statement that the product is from an aquaculture facility in the NT.

An aquaculture licensee may sell their product to a Fish Retailer licensee, an Aquarium Fishing/Display licensee, a Fish Broker, a Trader/Processor, another aquaculture licensee or a member of the public not intending to resell the product.

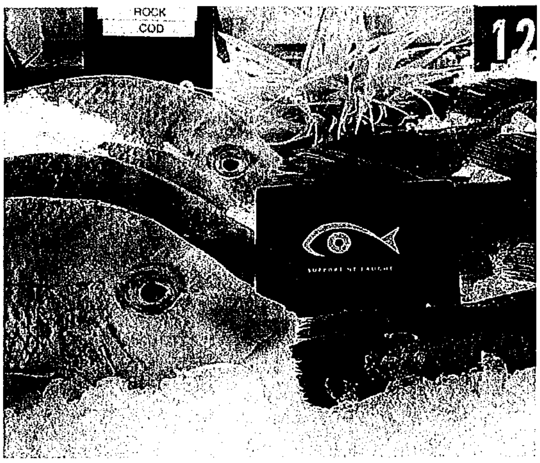
Fish retailers must ensure that all seafood offered for sale under their licence that has been sourced from an aquaculture facility, has a statement attached indicating the fish is a product of an aquaculture facility in the NT.

4. NEED

The fish retailer seafood labelling laws had been in place in the NT for 16 months when this project commenced and it was considered timely to assess the impact of the labelling requirements on the supply chain (i.e. from harvest to the consumer). Specific issues to consider were;

- if the labelling laws had lead to changes in seafood purchasing behaviour
- whether there had been a negative impact which lead to decreased seafood consumption, or a switch away from local product by either consumers or retailers
- whether there were significant financial impost on retailers as a result of the labelling requirements.

The information obtained through this project was designed to specifically assist the NT seafood industry and NTG to assess the impacts of the current labelling laws. In addition, as there has been calls for labelling from industry at the national level, and as the NT is the first Australian jurisdiction to implement such laws, the information obtained through this project will be useful for other jurisdictions who may be considering a similar approach to labelling.



NT Seafood Labelling has not changed consumption of our imported fish and seafood products.

Tim Haywood, Tims Surf & Turf

5. OBJECTIVES

The objectives of the project were to;

1. Quantify the quantity and origin of seafood sold in a range of food outlet establishments in the Darwin region
2. Monitor the impact of fish retailer labelling requirements along the supply chain within the Darwin region
3. Identify any impacts of the labelling requirements on consumer choice
4. Provide advice to DoR on the impact, operation and implementation of new labelling requirements.

It's a good practice and it helps hospitality Industries to understand the importance of the law, and for chefs to make a better decision in implementing ideas to clients' needs.

Tarit Ghosh, Treetops Restaurant Mirambeena.

6. METHOD

6.1 INTRODUCTION

The project methodology used a quantitative approach involving face-to-face interviews surveying two specific groups; Food Service Sector Venues (hotels/clubs, cafes/restaurants and takeaways) and Consumers.

A face-to-face approach was chosen for this research as food venue owners, managers and head chefs are generally time poor and the Steering Committee considered it was unlikely that they would respond to questions over the phone, or via a mail-out survey. A commitment to have the same person conduct the surveys for the duration of the project was a priority for the Steering Committee.

The scope was limited to Darwin and its suburbs so that all consumers and businesses faced a similar set of supply considerations.

Both groups were surveyed quarterly to obtain data on current seafood use (type, amount and origin) and to seek out potential problems involved in complying with labelling requirements. Quarterly surveys were considered necessary as Darwin has distinct seasonal activity based around the tourism industry, with visitor numbers over 250% higher in the peak season (May to September). Local fishing fleet activity is also very seasonal and activity drops based around closures and cyclonic activity during November to March.

A professional research analyst (VALERIE SMITH) was engaged to assist the Steering Committee in developing the questionnaires to ensure optimal survey outcomes. It was determined that it was necessary to undertake a total of five waves of survey activity in order to obtain strong base information, and then monitor results four times over a 12 month period.

A consultant (SUZANNE MORGAN Marketing) was engaged to liaise with food sector participants and coordinate and undertake the surveys.

6.2 STEERING COMMITTEE

To provide guidance to the project investigators and to ensure that the project met the timelines, objectives and could deliver on the agreed outcomes and outputs a Steering Committee was formed. The Steering Committee met formally on five occasions and interacted on an adhoc basis during the life of the project.

The Steering Committee key roles were to;

- develop appropriate questionaries
- engage a person/consultant to undertake the surveys
- engage professional assistance to develop the questionnaire to optimise validity
- engage professional assistance to analyse the survey data
- monitor the budget
- provide feedback to the consultants on project progress
- provide direction setting.

The Steering Committee was made up of the principal and co-investigators on the project, i.e.;

- Ms Katherine Sarneckis
  Chief Executive Officer, NTSC
- Mr T. Y. Lee
  President, Australian Culinary Federation NT (ACF NT)
- Ms Leonie Cooper
  Senior Policy Officer, DoR
- Mr Chris Calogeras
  Director, C-AID Consultants

6.3 CONSUMER SURVEY METHODOLOGY

An online survey was initially considered, but ultimately rejected, due to concerns whether such a sample would be representative of the general population in Darwin at various times of the year. In the NT, tourism is higher during the dry season months of May to September, compared to wet season months of October – April. For example, it would be very difficult to include interstate and international visitors in an online survey.

The Steering Committee, in consultation with the research analyst, determined that the consumer surveys would be best achieved by intercepting individuals in the Smith Street Mall, Darwin, during lunchtime periods.

General questionnaire content was agreed to by the Steering Committee. The expertise of the research analyst was utilised to ensure the use of language would not direct answer bias and 'trial' surveys were done to ensure the flow of discussion and clarity of questions being asked. Draft surveys were then reviewed, modified and coded to ensure integrity of the data collected.

The consumer survey was modified slightly (coding and arrangement of sentences) between waves 1 and 2 before finalisation (Appendix V).

Survey questions sought information relating to;

- demographics
- understanding of seafood labelling
- frequency of seafood consumption
- decision factors when purchasing seafood.

Interviews were conducted in five waves and consumers were encouraged to self-complete surveys with guidance by the survey consultant who was assisted by NTSC and DoR staff.

A total of 33 responses were received in the first wave of surveying. Upon analysis by the research analyst it was determined that a target of at least 60 surveys should be set for further survey waves in order to obtain an adequate sample to look at sub-samples (such as Darwin residents versus non-Darwin residents; high seafood consumers versus low seafood consumers, etc).

Subsequently a more proactive interception technique was employed by researchers in waves 2 to 5 and an extended survey collection period was also utilised to achieve the higher survey response rate.

Labelling is very important to stop 'black marketing'. It means we can advise customers formally on questions they would usually ask anyway, i.e. fish names and country of origin.

Tim Copping, Captains Seafood

Questionnaires were completed by hand at the time of interview. Data was then coded, entered into an excel database and analysed using SPSS (Statistical Package for the Social Sciences).

6.4 FOOD SERVICE SECTOR METHODOLOGY

Face-to-face interviews was chosen for this sector as it was felt by the Steering Committee that food venues owners, managers and head chefs are time poor and were unlikely to respond to questions over the phone or via an electronic survey.

A commitment to have the same person conduct the surveys for the duration of the project was a priority for the Steering Committee, in order to establish trust and continuity with participants and also to use someone who was perceived as being unbiased (not NTSC or NTG staff). This was achieved by utilising a contracted consultant.

The scope was limited to Darwin and Darwin suburbs so that all businesses faced a similar set of supply considerations i.e. proximity to NT commercial seafood suppliers, competitive pricing, consumer expectation of accessible fresh fish, high traffic locations.

The relevant Food Service Sector businesses from the Darwin area who supplied consumers with a seafood 'dining' experience were identified as belonging to three different categories or dining sectors, these were;

- restaurant/café (a place where plated meals are served to the public – a more formal experience)
- club/hotel (a place where alcoholic beverages are sold and drunk and plated meals are also served to the public – a more casual dining experience); and
- take-away outlets (a place where food is primarily to be eaten off the premises).

Dining venues serving imported seafood were identified through the DoR licensing database and then based on local knowledge the Steering Committee separated the venues into the appropriate dining sectors. Selected venues were then invited to take part in the project based on;

- type of venue
- type of menu

Seafood Labelling Laws in the Northern Territory require businesses who sell seafood to the public for consumption (cafés, restaurants, fish & chip shops) to have a B2 Fish Retailer licence.

NT Fisheries

- seafood sold
- popularity of venue
- willingness to participate
- location.

The target number was seven samples from each of the three dining sectors, providing an overall target sample of 21 dining outlets for the project.

General questionnaire content was agreed to by the Steering Committee. Draft surveys were then reviewed modified and coded to ensure integrity of the data collected. The expertise of the research analyst was utilised to ensure the use of language would not direct answer bias and 'trial' surveys were done to ensure the flow of discussion and clarity of questions being asked.

Survey questions sought information relating to;

- demographics
- menu structure
- use of seafood in meals
- suppliers
- decision makers
- meal production
- seafood usage
- decision factors when purchasing seafood
- impacts of labelling laws on operation
- retailers' perception of patrons understanding of labelling laws.

The food service sector survey was modified after wave 1, once base demographic information and the relevant species for the seafood usage table had been established. This had the additional benefit of ensuring the survey was no longer than necessary, aiding response rates. Two demographic questions were reintroduced in wave 5 to measure changes in supply and perceptions of the labelling laws (see Appendix VI).

The surveys were directed at the most senior decision maker who was involved in purchasing seafood within the organisation be it Owner, General Manager, Food/ Beverage Manager or Head Chef. Due to the range of questions included in the questionnaire, it was anticipated a variety of staff might become involved in providing all information requested. This was particularly relevant for the seafood usage table which often required reference to supplier invoices.

Data was collected by completing hand written survey forms completed face to face in an interview with the organisation by the survey consultant. Data was then coded, entered into an excel database and analysed using SPSS.

I think it should be required to have country of origin on all products, but not regional detail, as this is too much work due to changing suppliers and lack of consistent supply.

Ben Pile, Buzz Café

SURVEY RESULTS

7. RESULTS

The project had two key components, the Consumer Survey and the Food Service Sector Survey.

7.1 CONSUMER SURVEY

Tabulated results of questions undertaken during the consumer survey section of the project are shown at Appendix VI.

7.1.1 Completion Rate of Surveys

Self-complete consumer surveys were conducted by intercepting individuals in the Darwin Smith Street Mall area during lunchtime (typically 11am to 2pm). There were five waves of consumer surveys for a total of 279 respondents during the project (Table 1).

The average time taken by consumers to complete the survey was around ten minutes.

Wave	Date	Responses
Wave 1	16 April 2010	37
Wave 2	20 July 2010	61
Wave 3	12 October 2010	64
Wave 4	28 January 2011	60
Wave 5	2 March 2011	61
TOTAL		279

Table 1: Summary of Dates Consumer Survey Undertaken and Number of Respondents

7.1.2 Demographics of Consumers Surveyed

Nearly three quarters (74%) of consumers surveyed were from the Darwin area, 16% from interstate and 5% from overseas (Figure 2).

In the NT, tourism is higher during the dry season months of May to September, compared to wet season months of October – April. The number of tourists interviewed reflected these tourisms trends, with the highest number of tourists participating in wave 2 in the lead up to the peak tourism months (Figure 3).

The NT is considered to have a transient population. Of the 208 Darwin residents captured in the survey, 71% had lived in the city for more than three years. Another 14% had lived in Darwin for between one and three years. The proportion of longer-term Darwin residents captured in the survey was highest during wave 5 and lowest during wave 2; broadly following the same trend as usual place of residence of respondents. Of all respondents surveyed, 53% were living in Darwin at the time of the seafood labelling laws being introduced November 2008 (Appendix VII – Table 3).

Overall, 54% of the non-Darwin residents surveyed were in Darwin for five or less nights. The proportion of short term visitors (less than three nights) increases during the NT's peak tourism season (wave 2), with these visitors comprising 57% of non-Darwin residents during this time, compared to between 10% and 20% in the other four waves of research (Figure 4). This has implications for analysis of consumer knowledge of seafood labelling laws as it is reasonable to assume short-term visitors will have less understanding of the laws than an individual exposed to them for a greater period of time. This is reflected by the lowest awareness of seafood labelling recorded by consumers during wave 2 (Appendix VII – Table 8).

2 After analysis it was determined that a minimum of 60 respondents was required for the research.

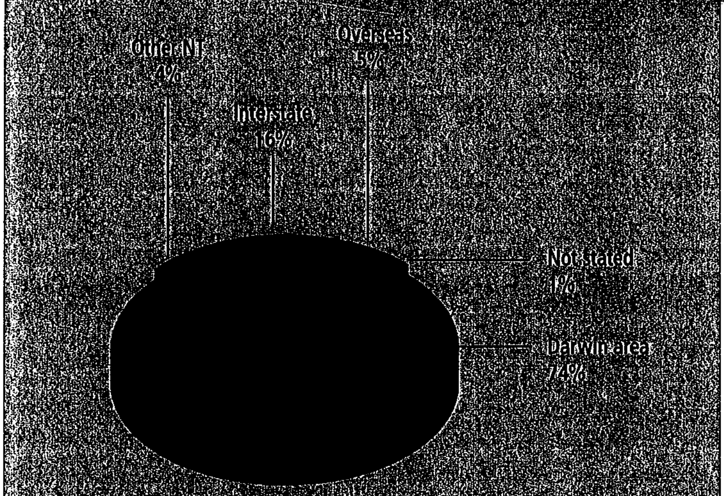


Figure 2: Usual Place of Residence, Total Consumer Respondents

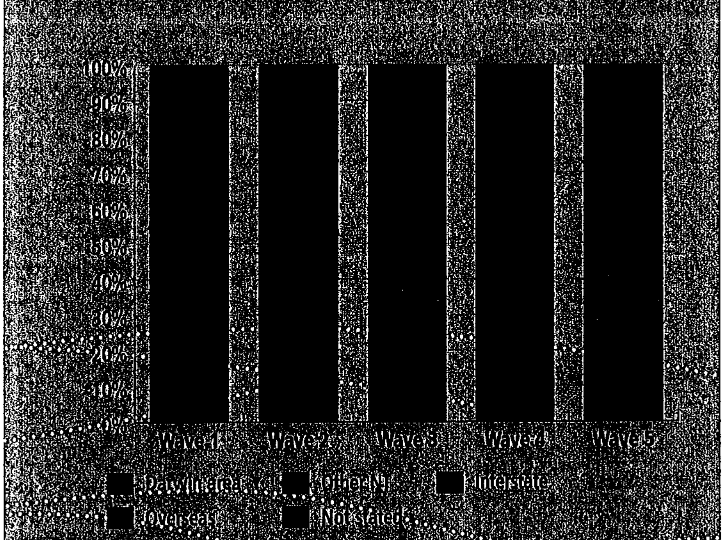


Figure 3: Usual Place of Residence by Survey Wave

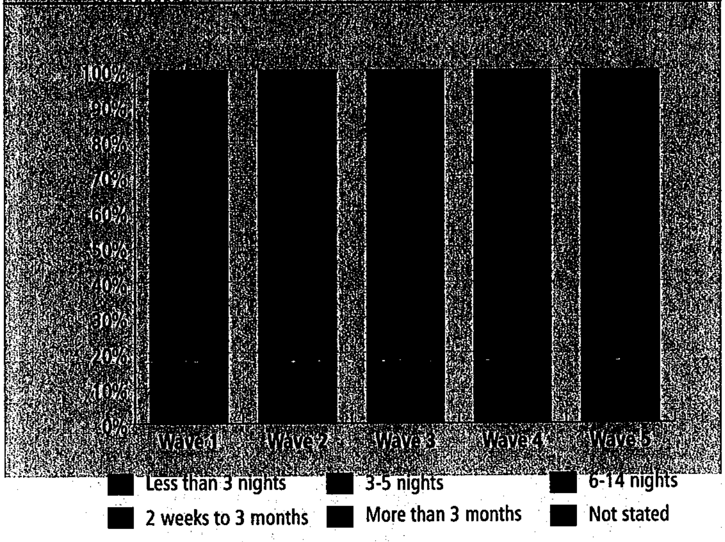


Figure 4: Length of Time Spent In Darwin on This Visit, Total Non-Darwin Respondents

7.1.3 Seafood Consumption

Forty three percent of respondents to the consumer survey were classified 'high seafood consumers', meaning they ate seafood from dining or take-away venues once or more a week (Figure 5). Fifty five percent of respondents were classified as 'low seafood consumers', eating seafood from dining or take-away venues once a fortnight or less.

All high seafood consumers were Darwin residents; with no non-Darwin residents falling into this category (Figure 6), indicating that Territorians surveyed dined out more often for seafood when compared to people visiting from interstate or overseas. This is an interesting result and it would be beneficial to explore the reasons behind this.

7.1.4 Consumer Values

As recently highlighted in a national review of food labelling law and policy, (*Labelling Logic - the Final Report of the Review of Food Labelling Law and Policy).* Food labels are highly valued as a communication option for consumer value information. Consumer value, as identified in the Labelling Logic report, relates to consumers personal values which allows them to make decisions about a range of issues that include animal welfare issues, religious beliefs, environmental issues, human rights and Country of Origin.

When consumers make decisions about purchasing seafood in a food service sector venue, they weigh up a range of factors. As part of the survey consumers were presented with a range of variables (such as freshness, price, origin, species etc) which might influence whether or not they purchase seafood in the food service sectors (restaurant/café vs. take away outlet; i.e. high end v low end) and asked to indicate the importance of each factor (Appendix VII – Tables 10 and 11). Consumers were asked to self rate on a scale of 1 to 5 (1 = least important and 5 = most important) the importance of the following factors when making a seafood purchase;

- freshness
- country of origin

- species
- sustainable fisheries
- price
- menu options
- region of origin
- wild v farmed.

The freshness of the seafood was overwhelmingly the most important factor, followed by country of origin when consumers considered purchasing seafood at either venue type (Figure 7). It would be beneficial to explore the consumers varying definition of 'freshness'. The third most important factor influencing choice varied between the two venue types, with restaurant/café consumers rating it as species, whilst at takeaway outlets it was price. Price was only rated as the 5th most important factor in restaurants/cafes indicating that consumers are more price conscious about purchasing seafood when considering take-away purchases (Figure 7).

With the sole exception of price, consumers rated all factors as more important when purchasing seafood in a restaurant or café than in a take-away outlet (Figure 7).

As with purchases in a restaurant/café, both high and low seafood consumers considered country of origin more important than 'region of origin' when making seafood purchases in a take-away outlet (Figure 7).

7.1.5 Value Placed on Australian-Caught Seafood

Supporting results from the previous section, consumers rated the importance of purchasing Australian-caught seafood highest for a restaurant meal. High seafood consumers consistently rated Australian-caught seafood as more important than low seafood consumers, for all three dining sectors considered. The differential in importance between high and low seafood consumers was largest for restaurant meals (Appendix VII – Table 12).

In order to assess the actual 'value' consumers place on the origin of seafood, respondents were presented with a variety of hypothetical 'barramundi

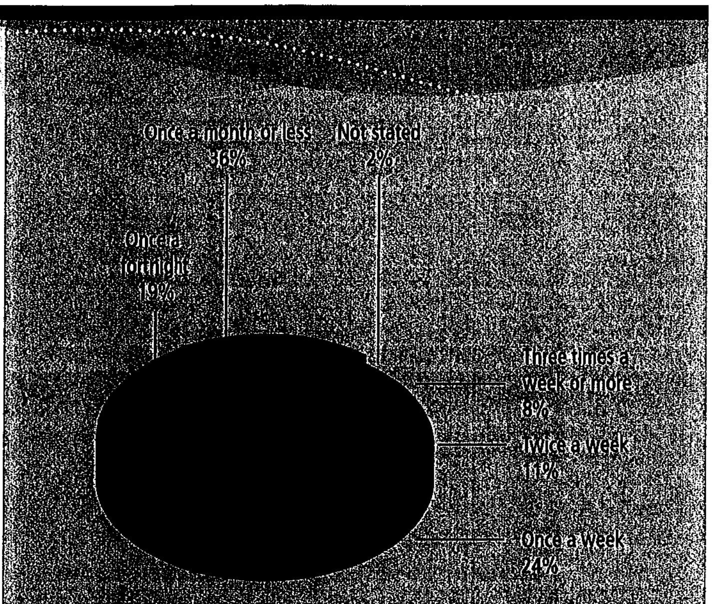


Figure 5: Frequency of Eating Seafood (Dining Out or Take-Away)): Total Respondents

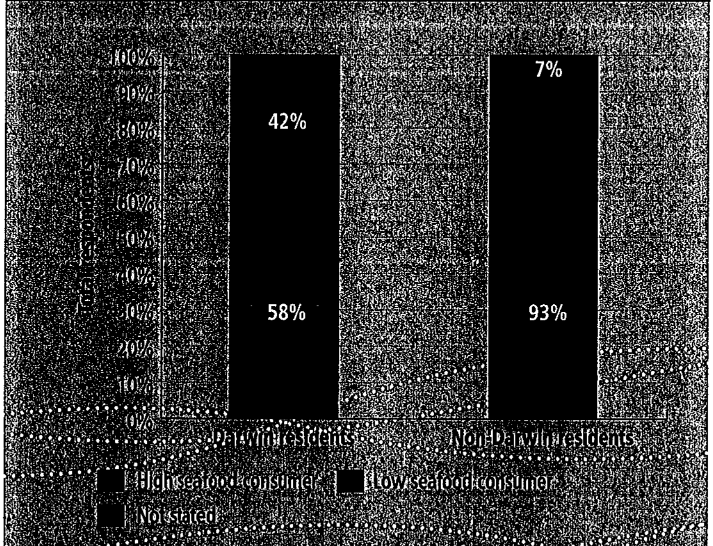


Figure 6: Frequency of Eating Seafood (Dining Out/ Take-Away) by Usual Place of Residence

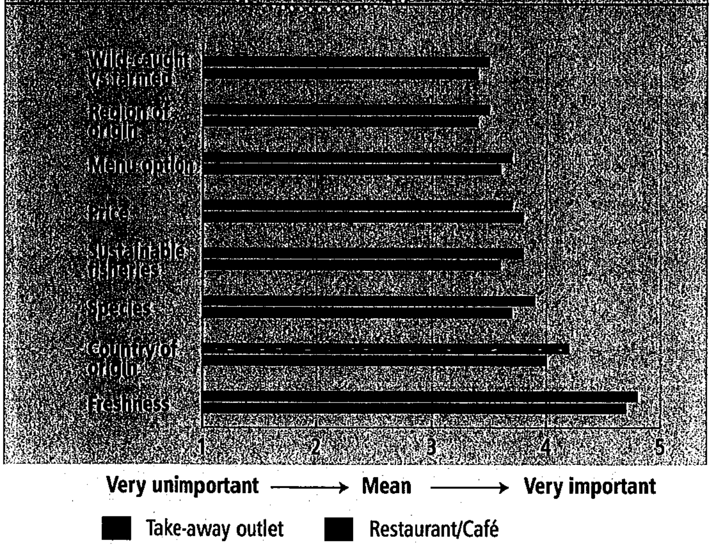


Figure 7: Factors Influencing Purchase of Seafood, Total Respondents

Figure 8: Consumer Preference Based on Hypothetical Labelling Options

Figure 9: Comparison Between Low and High Seafood Consumers Preference Based On Hypothetical Labelling Options

and chips' purchase options with a mix of prices and CoOL details. Consumers were asked to self rate from 1 to 4 (with 1 = most likely and 4 = least likely) which meal they would most likely purchase. Options were for a meal with the product showing the barramundi being;

- product of Thailand
- unlabelled
- showing the Australian Made Logo
- local wild caught.

The survey participants were not advised what each option meant; i.e. what 'local' meant and this is an important factor when we assess understanding of the labelling laws in later sections. Results showed that for a majority of consumers, country of origin of seafood is more important than price. Consumers indicated they would be willing to pay 25% more for a 'local wild-caught' seafood product than a similar option sourced from overseas (Figure 8, Appendix VII – Table 13).

Consumers also displayed a preference for seafood clearly labelled as Australian more than a similar product without an origin label; irrespective of the fact under the NT seafood labelling requirements both products would be sourced from Australia (Figure 8).

There was very little difference between high and low seafood consumers in their perceived 'value' of seafood origin, with both groups indicating they would pay a premium for local wild-caught barramundi meal and also for one labelled as Australian produced (Figure 9).

Low seafood consumers were slightly more likely than high seafood consumers to pay a higher price for a product identified as being local and wild caught compared to the other three options (Figure 9).

7.1.6 Perceptions, Awareness and Education

Consumers in wave 1 displayed a reasonable degree of suspicion regarding the seafood labelling requirements, with 12% providing some 'cynical response' such as don't believe or don't trust the labelling (Appendix VII – Table 6). However for reasons unknown that type of response had entirely disappeared by wave 3.

The NT labelling laws are such that if seafood does not have an 'imported' label a consumer would reasonably be expected to assume it is harvested in Australia, as only imported product must be identified under the legislation. However, over 40% of respondents assumed seafood which did not display a label of origin was imported. A further 23% indicated they did not know the origin of unlabelled seafood (Figure 10).

Only 34% of respondents indicated unlabelled seafood was from Australian waters, including the NT and Darwin areas (Figure 10).

Although the labelling laws had been in place in the NT for three years by the time of wave 5 of the surveys, respondents from Darwin were no more knowledgeable about the seafood labelling laws than respondents from elsewhere, with only 34% from both groups indicating that unlabelled seafood was not imported and is sourced from Australia, the NT or Darwin (Figure 11). For both groups, the most common response on the origin of unlabelled seafood was that it was from overseas (44% and 37% respectively) or they didn't know (21% and 30% respectively) (Figure 11).

Consumers were asked to self-rate their awareness of the NT seafood labelling laws on a scale of 1 to 5 (1 = least and 5 = most). The results indicate on average that respondents generally have a low impression of their understanding of the laws with 20% indicating they were 'very aware' (Appendix VII – Table 8). In analysing individual responses however, it was evident consumers who considered themselves very aware of the laws were no better than other consumers in understanding the source of unlabelled seafood.

Overall 42% of consumers rated their awareness of the labelling laws as 'not at all aware' (Appendix VII – Table 8). This is a reasonably low result and indicates there is a great deal of scope to improve consumer understanding of the labelling laws.

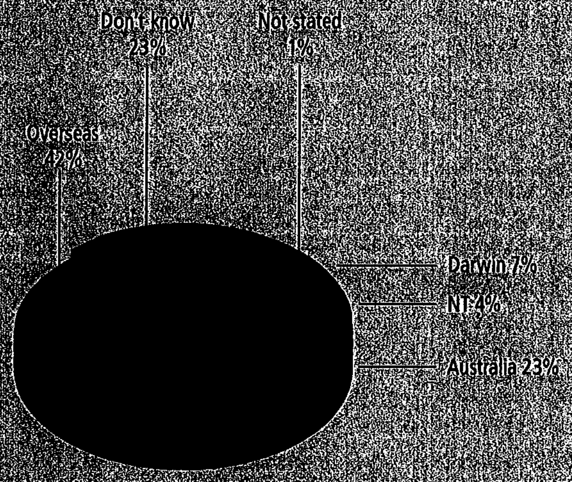


Figure 10: Consumer Assumption About Origin of Unlabelled Seafood

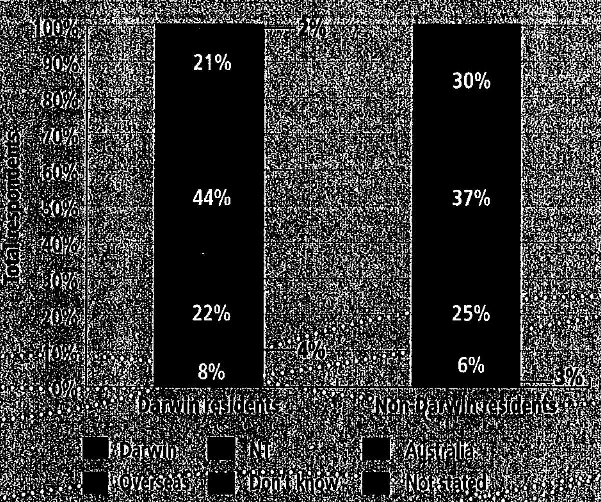


Figure 11: Consumer Assumption About Origin of Unlabelled Seafood, By Their Usual Place Of Residence

"65% of consumers did not know that if seafood was unlabelled it meant that it was Australian."

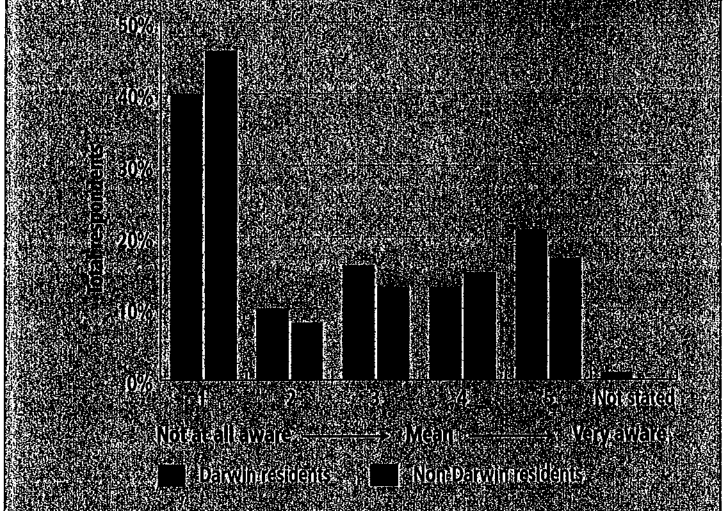


Figure 12: Consumers Awareness of Labelling Laws by Usual Place of Residence

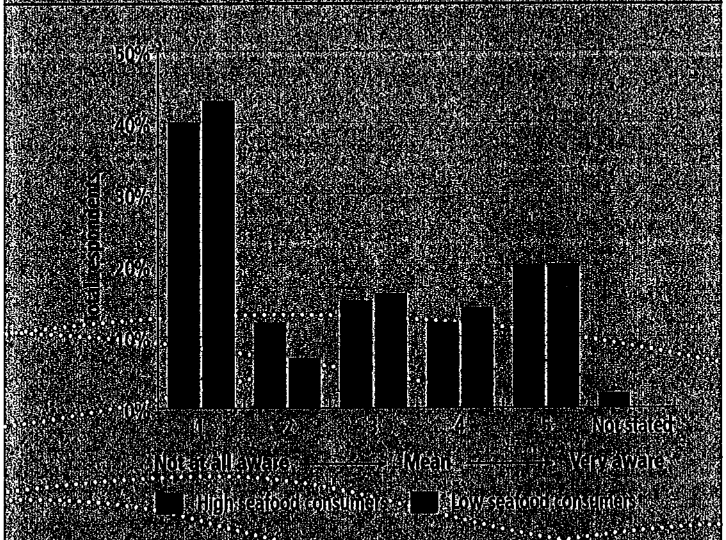


Figure 13: Consumer Awareness of Labelling Laws By High Versus Low Consumers

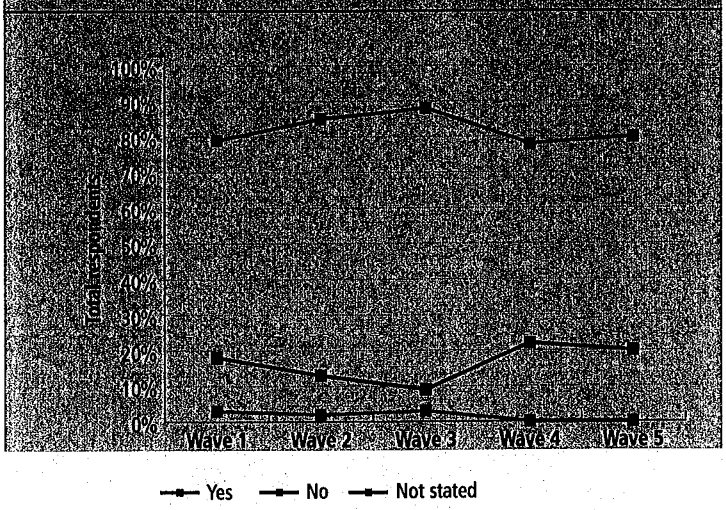


Figure 14: Whether Greater Knowledge of the Seafood Labelling Laws Would Influence Seafood Purchase

Darwin residents rated their awareness of the seafood labelling laws slightly higher than non-Darwin residents (mean rating of 2.7 versus 2.5 respectively). Forty percent of Darwin residents rated their awareness of the laws at 1 (not at all aware), compared to 46% of non-Darwin residents (Figure 12). Consumers rated their awareness of the seafood labelling laws highest in wave 1, before a large fall in wave 2 (peak tourist season) and an increase thereafter. (Appendix VII – Table 8)

There was no overall difference in awareness of the seafood labelling laws between high and low seafood consumers (Figure 13). Notwithstanding that the current consumer understanding and awareness of the NT seafood labelling laws was relatively low, when the laws were explained to respondents[3], 82% indicated accurate knowledge of the labelling requirements would impact on their seafood purchases (Appendix VII – Table 14). This supports the results in Section 8.1.5 that identified that respondents place a significant value on knowing the origin of the seafood they consume (Figure 14).

Consumers who indicated they were aware of the NT seafood labelling requirements (i.e. they did not self-rate themselves 'not at all aware') were asked to provide details of where they heard about the laws, in order to assess relative value of various communication methods. The most effective communication method as reported by those surveyed was via dining outlets (27%), followed by various local media mechanisms (newspapers 18%, TV 16%) (Figure 15). Many respondents indicated they became aware of the laws via multiple mechanisms.

3 Respondents were provided with the following information: 'Since November 2008 food outlets in the Northern Territory have been required to label all imported seafood sold for public consumption. Seafood not harvested from Australian waters is to be clearly labelled "imported". Dishes which contain multiple seafood ingredients, one or more of which have not been harvested in Australian waters, are to be labelled "contains imported seafood products". Would this knowledge of seafood labelling laws influence your choice of seafood purchases in the immediate future?'

The effectiveness of communication methods varied across the survey waves. Increases in responses may reflect local news stories or media activity on the topic at the time. Use of the Internet as a communication tool was first reported in wave 3 of the surveying (3%) and has grown each wave since that time (Appendix VII – Table 9).

Although not a requisite of the labelling laws, the results indicated consumers were confused about the specific meaning of 'local' as used in venue seafood labelling, with unprompted responses indicating 72% thought this meant the seafood was sourced from the NT (39%), Darwin (14%) or 'local' area (19%), whilst 19% believed it referred to Australian product (Figure 16). This meant that 91% of those surveyed understood that 'local' meant the product was Australian but it had a diverse range of meanings. As part of any labelling process (regulatory or industry driven) this appears to be an area that requires clarification.

7.1.7 Summary of Consumer Survey

The consumer surveys provided insight into a range of issues and knowledge surrounding seafood labelling and consumption drivers. These matters are highlighted below.

Knowledge of the origin of seafood impacts on consumer choice

The consumer survey indicates that after freshness, country of origin is the second most influential factor for consumers when choosing seafood in any type of venue.

This re-iterates the value of having labelling laws clearly and consistently detailed at the point of sale. Notably 82% of respondents indicated that an understanding of the NT Seafood Labelling laws would influence their choice of seafood purchase.

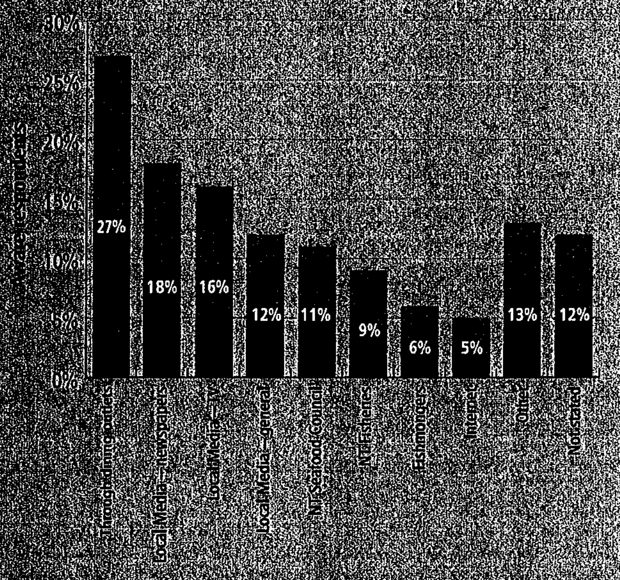


Figure 15: How Consumers Heard About NT Seafood Labelling Laws

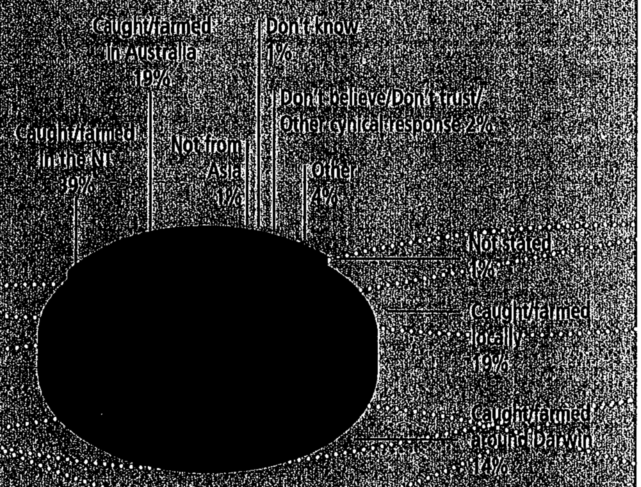


Figure 16: Consumer Understanding of 'Local' in Seafood Labelling

> ***"82% of respondents indicated that an understanding of the NT Seafood labelling laws would influence their choice of seafood purchase."***

Confusion over unlabelled seafood that does not have its origin disclosed

The current NT labelling laws, which do not require Australian harvested product to be labelled, results in confusion for consumers. In the absence of labelling, there is a lack of confidence in the origin of seafood with numerous and varied assumptions being made. The absence of labelling clearly identifying Australian seafood is inhibiting the consumer's ability to choose confidently that they are purchasing Australian seafood. This may have been the case before the labelling laws were put in place but the laws appear to have done little to resolve this confusion.

Survey data showed that consumers indicated a preference for Australian seafood over imported seafood (Figure 8) and there may be an advantage for businesses to clearly label Australian seafood as such.

Premium price for seafood labelled 'local'

Consumers indicated a strong preference to purchase Australian seafood, with a willingness to pay up to 25% more for Australian product over imported or unlabelled seafood.

Importance of origin of seafood for consumers

Consumer's values vary depending on the venue in which they are dining. At all styles of venues country of origin ranked as the second most important factor, behind freshness. This was more important at restaurants/cafes.

Consumers' current awareness and knowledge about the labelling laws

Consumer awareness of the labelling laws is generally low. Further education of the public or changes to legislation would assist in alleviating confusion over 'unlabelled' seafood.

Education to the food service sector over the value of including country of origin labelling on their menus for Australian product would also assist in this issue.

Consumers' confidence in the labelling requirements

Consumers initially displayed a degree of cynicism regarding the seafood labelling requirements, with 12% indicating some cynical response. This had entirely disappeared by wave 3 and it is unclear why this occurred.

There is an advantage for venues to clearly label their seafood as Australian, rather than leaving its origin unlabelled. This is an important issue that needs to be further investigated, as under the current NT labelling laws only imported product must be labelled, and all other product is not labelled or labelled voluntarily.

7.2 FOOD SERVICE SECTOR SURVEY

7.2.1 Introduction

There were five waves of the survey with 20 participants in each. All were conducted by the survey consultant. In the main, responses were for individual establishments, however one owner had multiple venues.

Ultimately a combination of face-to-face and electronic communication of the seafood usage table became an efficient means of completing the survey. The seafood usage table was often completed by an Accounts Manager or Head Chef and by providing it electronically prior to the face-to-face survey the required research could be coordinated at a time suitable to the business.

The average time to complete the questionnaire over all interviews was 45 minutes for wave 1, reducing each time as the participants became more familiar with the survey and were able to pre complete a portion of the survey. By wave 5, with the exception of the multiple venue owner, the length of time taken to complete the survey had reduced to approximately 15 minutes. The greatest time was spent on completing the seafood usage table.

7.2.2 Completion Rate of Survey

There were five waves of venue surveying with the 20 participating establishments. Face-to-face interviews were conducted with the 20 participating food service sector venues (Table 2).

Wave	Date	Completed Surveys
Wave 1	April 2010	[illegible]
Wave 2	July 2010	[illegible]
Wave 3	October 2010	20
Wave 4	January 2011	[illegible]
Wave 5	April 2011	[illegible]

Table 2: Summary of dates consumer survey undertaken and number of respondents

Due to the turnover in staff, in many operations, the number of people who were responsible for completing the survey in each venue ranged from 1 to 4 persons per establishment over the 16 month period.

Detailed spreadsheets of results from all questions undertaken during the food service sector survey section of the project are shown at Appendix VIII. The results are discussed below.

7.2.3 Demographics of Food Service Sector Venues Surveyed

This section of the report considers the background of the venues who were interviewed during the project, including their location and details of who controls the menu in the business.

A cross-section of Darwin based food service sector venues were selected for interview. The target was for seven venues from each of the three dining styles; however the final sample was unintentionally weighted towards the restaurant part of the sector due to their willingness to participate. Table 3 summarises basic characteristics of the venues which took part in the research.

Variable	Number	Percentage	TOTAL
Location			
Darwin CBD	14	70%	[illegible]
Darwin Suburbs	6	30%	
Menu Style			
Australian	10	50%	[illegible]
European	[illegible]	15%	
Asian	[illegible]	20%	
Other	[illegible]	5%	
Not stated	[illegible]	10%	
Dining Style			
Restaurant/Cafe	[illegible]	65%	[illegible]
Club/Pub	[illegible]	20%	
Takeaway	[illegible]	15%	

Table 3: Characteristics of Food Sectors Venues Surveyed

The range of covers served per week is large but the most common number of people that surveyed venues would serve over a year is between 451 and 999 per week followed by 1,000 – 1,500 per week (Figure 17).

The seasonality evident in the Darwin food service sector is demonstrated in Figure 17, with the number of covers greater than 1,500 served per week rising during wave 2 of surveying, which corresponded to the peak tourism season in July. Likewise, activity in the food service sector is low during January (wave 4), which corresponds with low local and low tourism demand in Darwin. This data supports the survey design which

4 21 venues were surveyed in wave 1, with one venue dropping out soon after; results have been amended for the full 20 participating venues for the 12 month period.

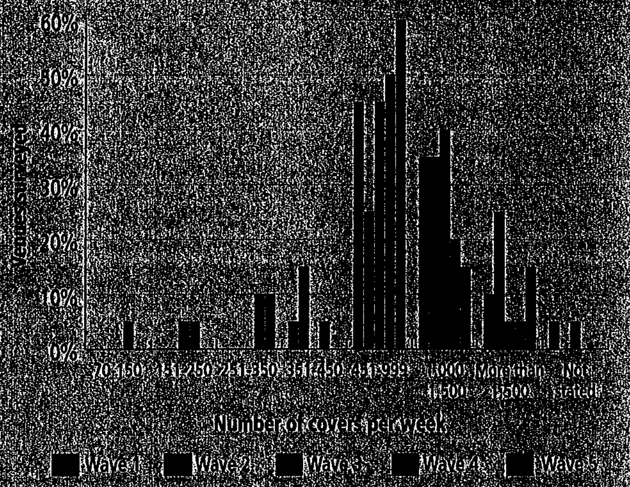


Figure 17: Numbers of Covers (Meals) Served Annually

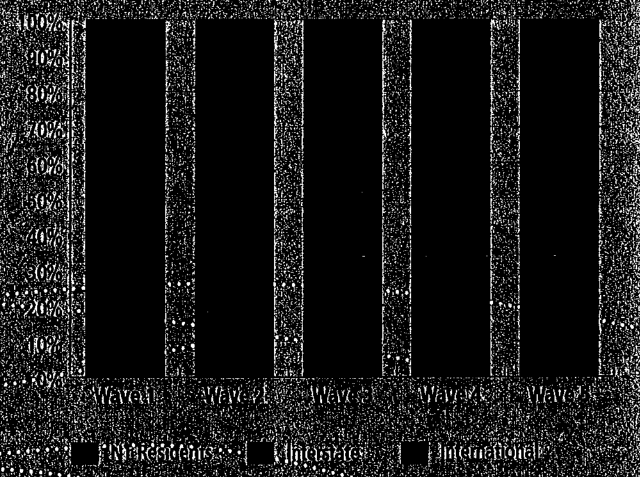


Figure 18: Composition of Darwin Diners - Annual Trend

hypothesised that it was necessary to survey throughout the year due to seasonal fluctuations in order to assess the impact of labelling requirements on consumer demand and venue supply.

In addition to the seasonality of the tourism industry impacting on the volume of meals served in venues in Darwin, the composition of diners also varies markedly during a year (Figure 18).

During the peak tourism season, in wave 2, nearly 50% of diners in venues surveyed were tourists; this fell to around 30% in the other waves. A significant proportion of these diners were from overseas, varying from 17% in wave 2, to 9% in wave 5.

7.2.4 Menu Design

Food service sector venues were asked various questions relating to their menu control and design, in order to assess the ease with which the business could make changes to the menu.

The majority (55%) of venues surveyed reported that the head chef controlled the menu and the owner controlled the menu in another 30% of businesses (Appendix VIII – Table 2).

In a reasonable proportion of venues where the head chef was responsible for controlling the menu, responsibility for purchasing seafood was shared with the venue owner (Appendix VIII – Table 3).

Thirty five percent of venues surveyed did not change their menu during the year. This included all take-away outlets, but also a small number of the restaurants/cafe and clubs/ pubs (Appendix VIII – Table 4). Twenty percent of surveyed venues changed their menu around four times per year (Appendix VIII – Table 4) and these were all restaurants.

Fifty five percent of the venues surveyed indicated they have fish or seafood specials on their menu (Appendix VIII – Table 5). The most common reason for including specials on the menu (Table 4) was to take advantage of seasonal product. This is important, given that fresh seafood in the NT is highly seasonal. Other key reasons surrounded innovation, trialling new ideas before putting them on the menu and customer demand (Table 4). It was noted that putting an item on a specials board is less risky for a venue than introducing it directly to a fixed menu. It also presents an opportunity for suppliers to have their product introduced into a venue.

Reason	Percentage Of Venues Who Use Specials
Seasonal product	[illegible]
Trial new idea before putting on menu	[illegible]
Innovation	[illegible]
Customer demand	[illegible]
Customers don't get bored	27%
Chefs don't get bored	18%

Table 4: Reasons for Including Specials on the Menu (Multiple Choice)

7.2.5 Seafood Supplies and Usage

In wave 1, most of the venues surveyed used multiple suppliers for sourcing their seafood, with three or more different suppliers common (Appendix VIII – Table 16). One venue reported using five different seafood suppliers and three venues had only one supplier. Supplier A was used by 70% of the venues surveyed in wave 1, with Supplier B and C also commonly used (Figure 19).

This question relating to the number of suppliers used was repeated in wave 5 of the survey to assess changes to supply over the preceding year. There appeared to have been a consolidation within the supply chain, with a greater proportion of venues surveyed using three major Suppliers: A, B and C (Figure 19). A number of smaller suppliers used in wave 1 were no longer used by the venues surveyed by wave 5 (Supplier E, F, G, H and I). On average, venues reported using fewer suppliers in wave 5 than in wave 1 (Figure 19).

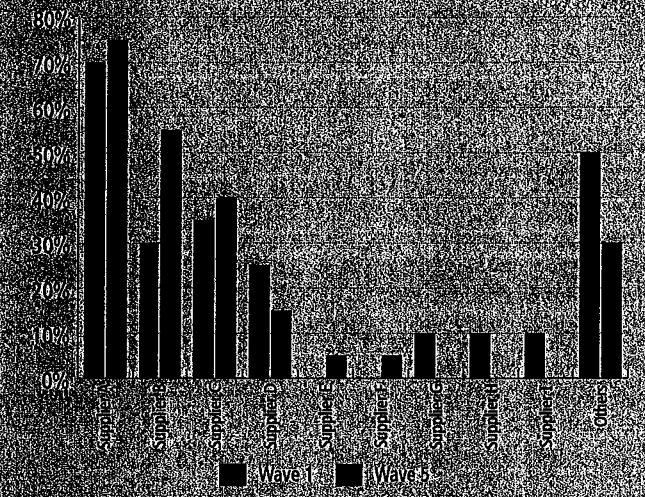


Figure 19: Percentage of Surveyed Venues That Sourced Seafood by Individual Supplier

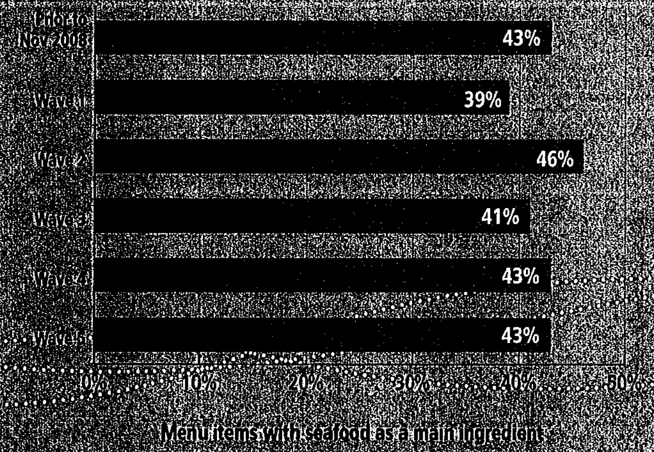


Figure 20: Menu Items with Seafood as Main Ingredient

The survey reported a high proportion of menus that included seafood as the main ingredient (Figure 20). The Fisheries CRC reports that the national average is 30% of menu items being seafood. Typically venues which sold a high proportion of seafood menu items did so throughout the entire year.

Venue owners identified that the proportion of seafood used as a key menu item varied throughout the year mainly in response to the availability of seasonal produce and demand by consumers, especially tourists. Figure 20 shows no evidence for any overall change in the use of seafood as a key menu item from the introduction of the labelling laws (Appendix VIII – Tables 10 and 11). This finding is supported by comments from Food Service Sector participants who stated that labelling laws had not impacted on menu inclusions or purchase patterns and had not lead to a change in consumption of imported fish and seafood products.

Venues were asked to provide detail of which species of seafood they used, how much of each species and details about its form (fresh versus frozen), origin and whether it was whole or filleted (Appendix VIII – Tables 9a-9e). A summarised set of data is shown in Table 5 and provides an overall picture of average use of seafood by the venues surveyed. It indicates the average food service venue surveyed in Darwin used on average 172 kg of seafood per week and 31 dozen oysters over the year (Table 5).

There were large differences evident in the origin of particular species of seafood, with barramundi, black jewfish, gold band snapper, king threadfin and mud crabs mainly being sourced from NT waters. In contrast, calamari and prawns used in the Darwin venues were imported (Table 5).

The average volume of barramundi used by survey respondents rose from 47kg per week in wave 1, to 51kg per week in wave 2, before falling back to

Species	Av (kg) per week	Form (%)		Origin (%)				Whole/ Filleted (%)	
		Fresh	Frozen	NT	Aust	Import	Mixed	Whole	Fillet/ prepare
Atlantic Salmon	[illegible]	86%	14%	0%	89%	11%	0%	2%	98%
Barramundi	46	11%	89%	77%	16%	7%	1%	5%	95%
Black Jewfish	8	21%	79%	81%	12%	4%	3%	6%	94%
Bugs	7	4%	96%	13%	66%	18%	4%	72%	28%
Calamari	26	0%	100%	4%	23%	69%	3%	26%	74%
Goldband Snapper	19	74%	26%	74%	22%	4%	0%	50%	50%
King Threadfin	10	10%	90%	88%	8%	0%	4%	0%	100%
Mud Crabs	3	89%	11%	69%	21%	10%	0%	96%	4%
Other fish	15								
Other shellfish	7	0%	100%	9%	47%	48%	0%	24%	76%
Prawns	28	2%	98%	18%	33%	49%	0%	22%	78%
Oysters	1 doz	61%	39%	2%	86%	10%	2%	24%	76%

Table 5: Seafood Usage Data by Key Species (Annual Average)

37kg per week by wave 5 (Figure 21). The volume of NT sourced barramundi remained stable at 31-32kg per week per respondent on average over waves 1 to 4 of the surveying, before increasing slightly to 34kg during wave 5 (Figure 21). This represented between 70 and 90% of the barramundi sold at the surveyed venues with imported product accounting for between 0 and 10% of the barramundi sold during the survey period (Appendix X – Table 9).

The top species in terms of penetration in Darwin were barramundi (used by all venues surveyed), prawns (98%), calamari (91%) and oysters (65%) (Table 6).

Species	Percentage
Barramundi	[illegible]
Prawns	[illegible]
Calamari	[illegible]
Oysters	[illegible]
Other shellfish	[illegible]
Black Jewfish	[illegible]
Goldband Snapper	[illegible]
King Threadfin	[illegible]
Bugs	26%
Atlantic Salmon	20%
Mud Crabs	19%

Table 6: Seafood Penetration (Annual Average Waves 1-4)

During periods of extra demand, the need for increased supply appears to be met largely from overseas sources (Figure 21). This indicates there may be an opportunity for the local industry to increase its supply of barramundi during peak periods of demand.

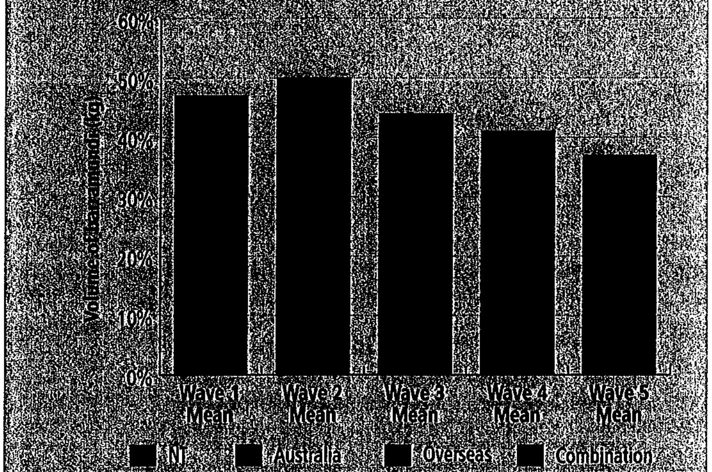


Figure 21: Volume of Barramundi Used In Survey Venues by Source

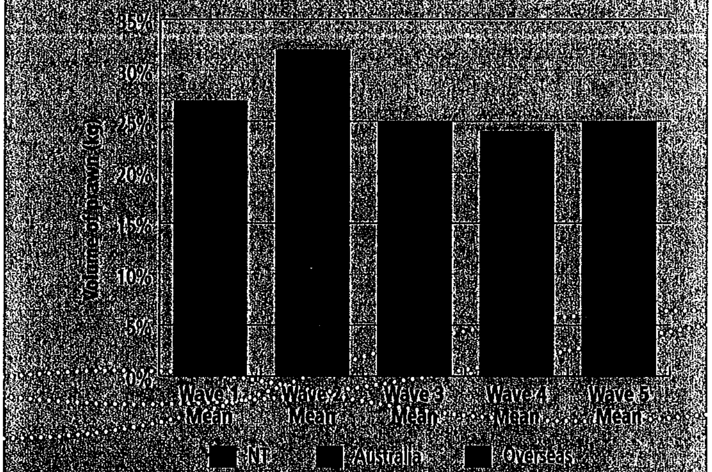


Figure 22: Volume of Prawn Used In Survey Venues by Source

The average volume of prawn used by survey respondents rose from 27kg per week in wave 1 to 32kg per week in wave 2 before falling back to 25kg per week in waves 4 and 5 (Figure 22). Over this time, the percentage of NT prawn used ranged from 9% to 20%, Australian prawns from 8% to 32% and imported prawns were between 56% and 70% (Figure 22). The major source of prawn sold in Darwin by the food service sector outlets surveyed was from overseas (Figure 22). This indicates there may be an opportunity for the local industry to increase its supply of prawns to the food service sector.

Venues were asked for information about whether there were any particular species of seafood they would like to use more of. From wave 2 onwards, around half the venues surveyed in each wave indicated they were interested in increasing their use of specific types of seafood (Appendix VIII – Table 13). There was consistent demand for increased volumes of fresh (i.e. not frozen) NT caught fish. Prawns, barramundi and mud crab were also species that venues indicated they would like to use more of.

According to the Australian Seafood CRC, the most popular imported fish in Australia are hoki, hake, Nile perch and basa. The survey results only indicated minimal use of hoki and basa in the Darwin region, not hake or Nile perch. Identified sources of imported seafood were Thailand, Vietnam, China and New Zealand (Appendix VIII – Tables 9a-9e).

The Steering Committee identified an opportunity to undertake additional research during wave 4 with key NT Trader Processor businesses that had been identified in Wave 1 of the Food Sector Survey. The objective was to gain a sense of whether their product line and supply issues had changed as a result of the NT Seafood Labelling. Five businesses agreed to complete the survey (Appendix IX for questionnaire).

The results showed the labelling laws have had an impact with two of the five companies reducing their import inventory by 10% and 20% respectively with the other three showing no increase in the use of imported product (Table 7). Two of the companies that registered no change focus on Australian product and identified a trend from their customers seeking more 'local' content. One supplier has maintained his focus on imported product. The data is included at Appendix X.

This change was articulated in the feedback from NT Trader Processor licensee Supplier 5, who said "within months we had removed the majority of basa and hoki and replaced it with barramundi, shark, mackerel, threadfin salmon and increasingly red emperor and rock cod to accommodate changing demand".

Supplier	Current proportion of seafood imported	Prior to the labelling laws – proportion of seafood imported	Species added or removed from supplies due to labelling laws
1	30%	40%	Not really. Amended Business Plan to up sell supply of local produce, this is reflective in marketing activity, retail signage
2	0%	0%	Started to expand the range of local species due to demand for more local, in particular prawns and crabs
3	0%	0%	No. All Australian Seafood
4	90%	90%	No. Lack of supply and when available its [illegible] times the price
5	[illegible]	70%	Yes. Removed majority of Basa and Hoki and replaced with Barra, Shark, Mackerel, Threadfin Salmon and increasingly Red Emperor and Rock Cod

Table 7: NT Trader Processor Comparison of Seafood Inventory Prior to and at Wave 4 of Survey

7.2.6 Perceptions of seafood

When planning their menu, food sector venues consider the inclusion of seafood alongside competing products, including a variety of meat products such as chicken, beef, lamb or pork and vegetarian dishes. The chefs' and venue owners' perceptions of the characteristics of seafood influences their willingness to include additional seafood choices on their menu. A variety of attributes of both imported and 'local[5]' seafood, were investigated to better understand the ranking of importance for menu planning (Appendix VIII – Tables 14 and 15).

Respondents were asked to self-rate their perceptions of attributes for utilising particular seafood items on a scale of 1 to 5 (1 = least important and 5 = most important). Attributes for consideration related to;

- cost
- taste
- packaging
- availability
- supplier inventory
- consumer demand
- quality
- portion size
- profit margin
- pricing stability
- shelf life
- menu variety.

When considering 'local' seafood, the most highly ranked attributes for increasing its use were taste, consistent high quality, demand and it being readily available year round (Figure 23). Availability is a current barrier to increasing usage of local seafood. During wave 3 of the survey, a number of venues identified difficulties in sourcing sufficient and consistent quantities of local barramundi[6] and jewfish (Appendix VIII – Table 28). There appears to be an opportunity for industry to increase availability of local fish throughout the year.

The lowest ranking influence to increasing use of local seafood was flexible portion packaging (Figure 23). This was particularly relevant to venues using shelled prawns, pre battered fillets or seafood basket mixes.

When considering imported seafood, the most highly ranked attributes for increasing its importance was taste, consistent high quality, cost and then profit margin (Figure 23).

Cost was a relatively more important factor when considering imported seafood (3rd ranked most important attribute) than local seafood (5th ranked most important attribute) (Figure 23).

Before the research was undertaken, it was hypothesised that over time, increased knowledge of the origin of seafood would shift consumer demand for local seafood, thereby influencing the importance venues place on this attribute when making menu choices. The data suggests this has been the case, with the importance of 'consumer demand' rising from 4.1 in wave 1, to a high of 4.9 in wave 5 (Appendix VIII – Table 15). Consumer demand was a major influence on the use of local seafood, rather than imported seafood.

The importance of suppliers in influencing seafood usage was demonstrated by the research. Overall venues rated the importance of 'my supplier stocks it' at 4.0 for imported seafood and 4.3 for local seafood (Figure 23). In the period from wave 1 to wave 5, the importance of this attribute increased from 3.2 to 4.8 for imported product and from 3.7 to 4.5 for 'local' product.

5 The choice provided to those being surveyed was a choice between 'imported' and 'local' seafood without either being defined.

6 This coincides with the commencement of the closed season for the barramundi fishery

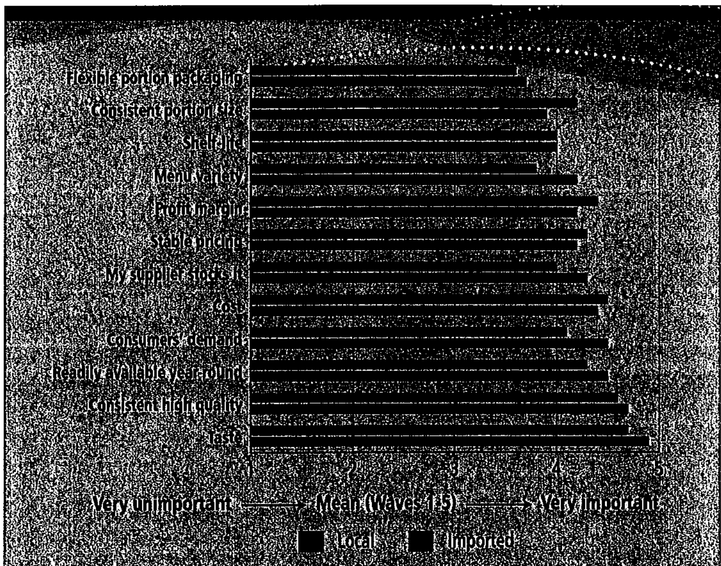


Figure 23: Importance of Attributes for Increasing Usage of Seafood

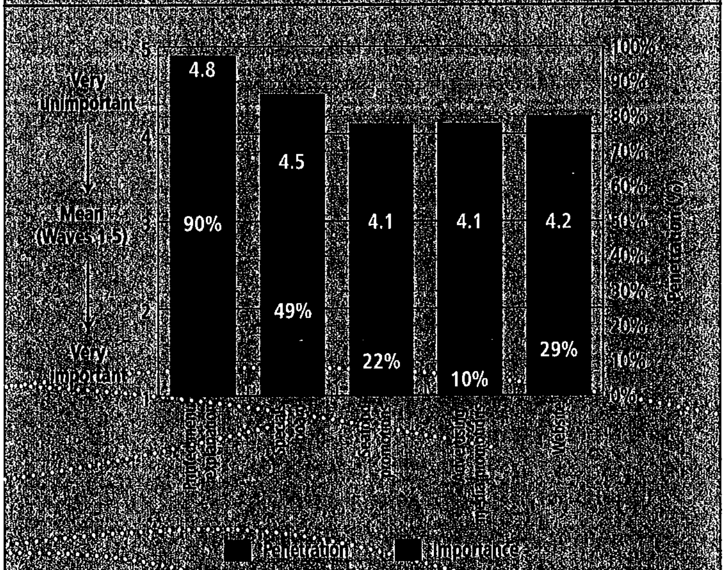


Figure 24: Means To Communicate Seafood Origin to Consumers – Importance and Penetration

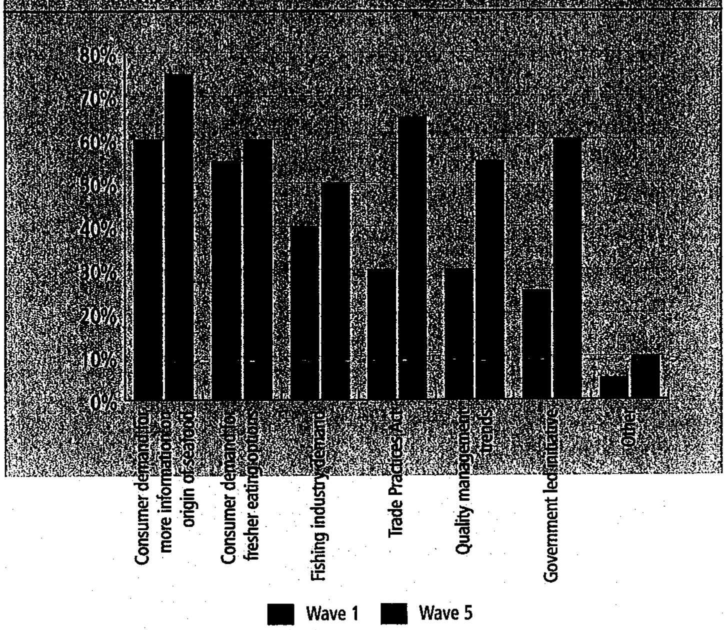


Figure 25: Perceived Drivers for Introduction of Labelling Laws

7.2.7 Identifying Labelling Laws

Venues were asked how they identified seafood to consumers as imported or 'local' and provided with a number of options, i.e.;

- advertising/media
- printed menus
- promotions
- special boards
- website
- other.

Respondents were asked to self-rate how they identified seafood to consumers and their perceptions as to the effectiveness of the method on a scale of 1 to 5 (1 = least important and 5 = most important) The labelling laws require any seafood identified for sale to be labelled as being imported, irrespective of what medium is used e.g. menus, websites, specials boards etc.

The most common technique identified was via printed menu, which was used by 90% of venues on average over the survey activity (Figure 24). By wave 4, all 20 venues surveyed were using their printed menus to identify origin of seafood (Appendix VIII – Table 17). Special boards and websites were also common methods used by venues to communicate seafood origin (49% and 29% respectively on average) (Figure 24).

Printed menus were considered by venues as the most effective mechanism to communicate seafood origin, which underlines the high penetration of this method of communicating with consumers (Figure 24).

The NT's seafood labelling laws do not require Australian harvested seafood to be labelled as Australian, however, information received prior to the 1st wave of surveys indicated that some venues saw a marketing opportunity in doing so. The Steering Committee hypothesised that the prevalence of voluntary identification of Australian seafood would increase if consumers increasingly demanded this. The data supports this hypothesis.

Of those businesses labelling 50% and over of their stock, only 55% of Australian seafood was labelled 'local' in wave 1. This had risen to 85% by wave 4, and was 70% at wave 5. (Appendix VIII – Table 18).

The most common Australian seafood labelled 'local' was NT Barramundi, with 83% of venues doing so. Coffin Bay oysters (33%), Tasmanian salmon (16%) and NT prawns (16%) were also commonly labelled as Australian or 'local' seafood (Appendix VIII – Table 19). It is likely that demand by consumers influenced labelling of the iconic NT Barramundi.

The cost to venues in implementing the labelling laws was highest initially following the legislation's introduction as large expenditure items such as menu boards were updated, and subsequently decreased over time. By wave 5 the majority (70%) of venues surveyed were no longer incurring costs in implementing the labelling laws (Appendix VIII – Table 20). Venues advised they spent on average $630 implementing requirements for the labelling laws. Several venues spent less than $100 in total since the laws were introduced in November 2008, while one venue reported spending several thousand dollars implementing the labelling laws as a result of menu board changes.

Although several venues implied that the labelling laws were locking them in to a category of fish local or imported as it was easier to maintain a standard order than coordinate menu changes (Appendix VIII – Table 12 and 28), overall this was not supported by the data

During wave 1 venues were questioned regarding their perceptions as to why the seafood labelling laws were introduced and this was repeated during the wave 5 survey, to assess whether venues' perception about the laws had changed over the survey period (Appendix VIII – Table 21).

The data showed that consumer demand was the driving reason for the new laws. In wave 1, 60% of venues believed the labelling laws were driven by consumer demand for more information on the origin of seafood and by wave 5 this had increased to 75% (Figure 25). This confirms findings from other sections of this report which suggests venues' have increasingly recognised the importance of consumer demand regarding origin of seafood over the five survey waves.

Wave 5 results also indicated an increase in the venues' perception of the following motivators for the introduction of the labelling laws; the Trade Practices Act up 35%, Quality management trends up 25%, and that it was a Government led initiative up 35% (Figure 25).

Venues were queried about their perception of consumer understanding of the seafood labelling requirements, in order to assess the linkages with seafood usage and venue demand. It was expected that venue perception of consumer understanding of the laws would increase over time, particularly if consumer behavior changed at the same time.

Respondents were asked to self-rate how they generally viewed consumers' understanding of the labelling laws on a scale of 1 to 5 (1 = not aware and 5 = very aware).

The food service sector generally viewed consumers' understanding of the labelling laws on average as 3.3 (Appendix VIII – Table 27), slightly higher, than consumers rated themselves at 2.6 on average.

Results indicated that venues perceived NT residents as having greater understanding of the seafood labelling requirements than visitors from interstate or overseas (3.6 compared to 3.1 across the five survey waves) (Appendix VIII – Table 27). While this result was expected as NT residents have been exposed to media coverage of the requirements since the introduction of the laws, building up understanding over time, research from the consumer surveying found that NT residents do not have any greater understanding of the labelling laws than visitors.

Over the survey period, venues' perception of consumer understanding of the laws increased slightly (Appendix VIII – Table 27).

7.2.8 Compliance

The National Fisheries Compliance Committee defines that compliance programs includes education, awareness, voluntary compliance and enforcement as aspects of effective compliance programs.

At the time the NT labelling laws were introduced in November 2008, a series of letters were sent to Fish Retailers regarding the development and implementation of the labelling requirements. In addition, the NTG undertook a targeted education campaign to increase consumer and fish retailer awareness of the seafood labelling laws. This campaign included site visits to over 350 fish retailer establishments throughout the NT, a local media campaign, fact sheets distributed at the NT's Show circuit and other predominant places as well as responses to reports of non compliance.

Fish retailers are also advised annually at the time of licence renewal of their obligations regarding seafood labelling. Information relating to seafood labelling is also located on the NTG and NTSC websites. In addition a number of media opportunities and events have taken place annually since the introduction of the labelling laws in 2008.

At the conclusion of a three month education campaign, focus shifted to intelligence driven compliance visits. To date, there have not been any prosecutions in relation to seafood labelling although a number of cautions have been issued since the implementation of the laws.

In addition, a number of media opportunities were used to highlight the laws.

Survey results show that 90% of licensed Fish Retailers had complied with the legislative requirements of the labelling laws within three months of their introduction. Of this, 55% reported that they had complied with the seafood labelling laws within one month of their introduction and another 35% of venues within three months (Appendix VIII – Table 23). The one venue that hadn't complied by wave 1 of the survey indicated that problems with achieving full compliance were compounded by staff turnover issues.

Ongoing expenditure through menu changes was evident in complying with the laws, even after venues indicated they had achieved full compliance. From wave 2 to wave 5 venues surveyed indicated expenditure ranging from less than $100 to over $500 (Table 8). However, by wave 5 all expenditure

Compliance Expenditure	Wave 1		Wave 2		Wave 3		Wave 4		Wave 5	
	No's	%	No's	%	No's	%	No's	%	No's	%
Nothing	N/A	-	9	45	9	45	7	35	14	70
<$100	6	30	2	10	1	5	6	30	4	20
$101–$250	4	20	3	15	1	5	3	15	1	5
$251–$500	2	10	2	10	1	5	2	10	1	5
$501+	7	[illegible]	[illegible]	[illegible]	0	0	1	5	0	0
Not stated	1	5	1	5	8	40	1	5	0	0
TOTAL	20	100	20	100	20	100	20	100	20	100

Table 8: Expenditure by Venue to Comply With Labelling Laws

was less than $500 per survey period. The major reason for ongoing expenditure was to accommodate menu changes.

Thirty five percent of the venues indicated in the first wave of surveying that they had removed species from their menu due to the seafood labelling laws, but it is unclear what species (Appendix VIII – Table 24). By wave 2, the proportion of seafood on the menu had recovered. Of the seven venues who had removed species in response to the new labelling requirements, none indicated that it was difficult to research new menu options or purchase new ingredients (Appendix VIII – Table 25).

As previously mentioned staff turnover has a direct impact on the effectiveness of the implementation of labelling laws in the NT. It is evident that a clear understanding of the communication environment is required when introducing new legislation. To put the food service sector in context in the NT, awareness issues can be considered in line with the broader tourism industry which caters to the demands of consumers both local and tourists.

The National Long Term Tourism Strategy identifies tourism as a labour intensive industry, with many frontline staff casual or part time unskilled employees with poor retention. The NT Five Year Tourism Strategic Plan states that in such service based industry, the workforce is characterised by;

- relatively young workers
- more casual and part time workers
- minimal formal education or English language requirements
- large amounts of informal on the job training
- high staff turnover due to seasonal requirements.

The implications for labelling laws in this environment are clear, there must be simple, timely and ongoing training provided to all relevant staff. The NT Liquor Licences and the Responsible Service of Alcohol is a case in point. In this case signage is clearly present at the point of sale (as with the NT labelling laws) but in addition, all staff selling the product must have completed a formal training program on the laws and its consequences if compliance is not adhered to. Whilst this is extreme it does provide an example of an approach to education and awareness in an industry with high staff turnover.

As this issue of lack of awareness and education evolved throughout the research project, the Steering Committee initiated some programs to improve the situation. These are briefly listed below.

NT Seafood Labelling Laws - Fridge Magnet

A fridge magnet was designed with the input of the Steering Committee, and produced by the NTG, to highlight the key compliance messages relating to the labelling laws, including a checklist of compliance opportunities and a telephone number to report non-compliance. A copy of the design is included as Appendix XI. The magnet will be distributed with the next round of Fish Licence renewals. Its aim was to be a visual communication tool and will continually remind front line staff, back of house staff, and management, of the laws every time they open the fridge or handle seafood.

NT Seafood Labelling Laws - CDU Training Program

The Steering Committee identified an opportunity to extend the use of the consumer and food sector surveys to develop an NT Seafood Labelling Law program for the Charles Darwin University (CDU) Commercial Cookery class. The Steering Committee developed the following tools;

- consumer survey – student version
- food service sector survey – student version
- NT labelling student presentation.

These educational tools are being utilised in the CDU 'seafood unit' each semester. The unit was completed only once within the time frame of the FRDC Project, so comparative data is not available. A copy of the survey provided to students is included as Appendix XII.

NT Seafood Labelling Laws - Media Event

A media event was initiated with the Minister for Primary Industry, Fisheries and Resources. The event involved the combination of a food sector survey participant serving journalist NT mud crab, the wave 3 consumer surveys being conducted and the opportunity to speak with the Chairman of the NTSC regarding the impact of seafood labelling laws.

The major newspaper, commercial TV station and ABC radio all published positive stories regarding the labelling laws.

A copy of the media release and copy from the media event are included as Appendix XIII.

A second round of media highlighting the labelling laws is to coincide with the formal release of this report.

7.2.9 Summary for Food Sector Surveys

The food sector surveys provided insight into a range of issues surrounding seafood usage and the impacts that the labelling laws have had on the sector. These matters are highlighted below.

Type, quantity and origin of seafood sold by selected fish retailers in Darwin

The Food Sector Seafood Usage Surveys provided a seasonal picture of the type, quantity and origin of seafood sold by selected fish retailers in Darwin.

The survey showed the top species in terms of sales in Darwin were barramundi, prawns, calamari and oysters. It also showed that demand was increasing for a wider range of 'local' species during the life of the project.

It also provided some insight into how seasonal demand for key species is being met through a number of sources, such as greater use of NT, Australian or imported product. Opportunities existed for 'local' product to gain greater market penetration if some identified issues around supply consistency and price are addressed.

Impacts on the range and volume of seafood offerings in fish retail outlets.

Survey results show that the labelling laws have not reduced the range and volume of seafood available in fish retail outlets. There has been no evidence for any overall reduction in the use of seafood as a key menu item since the introduction of the labelling laws.

The proportion of seafood as a key menu item however varied throughout the year in response to seasonal produce and demand by consumers, especially tourists.

Impacts of consumer demand on menu structure

The research suggests that venues have become more conscious of consumer demand, especially in relation to providing 'local' seafood.

The surveys showed that venues were conscious of consumer demand which contributed to an increase of over 15% in the use of 'local' product during the period from wave 1 to wave 5.

Consumer demand was considered more important in influencing the use of 'local' seafood over imported seafood.

Influence of suppliers on venue seafood purchases

The importance of suppliers in driving seafood usage is demonstrated through the survey with data indicating that suppliers had an increasing role in influencing venue purchases.

During the life of the project 'my supplier has it' showed an increase in importance from wave 1 to wave 5 indicating the importance of that sector in influencing product availability in food sector venues.

Awareness and compliance of the food labelling laws

Currently the understanding of the labelling laws is poor. Improved awareness and compliance of the labelling laws will require a holistic approach to informing the fishing and seafood industry, food sector venues and consumers along with a strategic approach to enforcement. Different approaches will be required to reach all parts of the supply chain.

From a consumer perspective understanding is very low.

Food sector survey participants appeared to have a reasonable understanding of their responsibilities under the labelling laws and this showed an improvement over the life of the project. It is however unclear what those outside of the project know of the labelling laws.

The food service sector has a considerable staff turnover and consequently knowledge of labelling laws will be frequently lost to the organisation without ongoing and proactive programs (in-house and externally) being in place.

Some compliant food sector venues would like to see a greater enforcement presence to ensure that all venues are operating from the same page and meeting not only their legal obligations, but also providing their clients with correct information.

Relying on word of mouth transfer of information can over time lead to subtle changes in the meaning and interpretation of the labelling laws and as errors typically accumulate over time the meaning can become lost. This is especially a problem for the food service sector.

Clarity is required with respect to requirements and responsibilities relating to the labelling laws. Uncertainty as to meaning of terms such as local, regional, Australian product etc lead to a level of confusion across those involved in the surveys.

Ongoing education and awareness of the NT seafood labelling laws will be challenging and compliance will be limited unless there is a cultural change at the consumers and industry levels.

The research indicated the most effective communication method for labelling laws as reported by consumers was via dining outlets. This was supported by the food sector group where menus were considered by venues as the most important mechanism to communicate seafood origin.

The development of national standards in labelling and subsequent awareness programs, at the food sector and consumer level, would assist in ensuring that many of the issues relating to a transient workforce and high tourist numbers become less of a NT-only issue.

Rationale for the labelling laws

At wave 1, 60% of venues believed the labelling laws were driven by consumer demand for more information on the origin of seafood and by wave 5 this had increased to 75% of surveyed venues. This suggests venues have increasingly recognised consumer demand regarding seafood labelling.

Over the survey period, food sector venues placed more importance on a number of influences such as consumer demand, seafood industry demand, trade practices identified as to why the labelling laws might have been introduced.

Food sector venues perception of consumer understanding of the laws.

Food sector participants generally viewed consumers' understanding of the labelling laws as slightly above 'mediocre' – this aligns with results from the consumer survey. Results also showed that venues perceived NT residents as having greater understanding of the seafood labelling requirements than interstate or overseas visitors, whilst the consumer surveys showed they didn't have any greater understanding of the labelling laws than visitors.

Over the length of the project food sectors venue participants didn't believe that consumers had developed any significant greater understanding of the labelling laws.

Impacts of labelling on the use of local seafood on the menu.

Whether or not to put imported seafood on a menu is a conscious business decision being made by venues and this in turn impacts on seafood purchases at the supply end.

8. BENEFITS AND ADOPTION

The project has benefited the organisations and sectors that participated in the project, including the local fishing and seafood industry, selected food service sectors and the NTG by evaluating and gaining a greater understanding of the impact of NT seafood labelling laws, the issues surrounding its implementation and the opportunities that it presents.

The results of the surveys have demonstrated a high level of support from consumers for seafood labelling laws that identify imported seafood, and also highlighted challenges and opportunities for the fishing and seafood industry and the food service sector along the supply chain.

The project has delivered the following benefits to the **Fishing and Seafood Industry;**

1. A better understanding of the impacts seafood labelling has
2. Increased understanding of the composition, quantity and origin of seafood sold in food outlet establishments in the Darwin region
3. A better understanding of the opportunities available to improve supply of key species (i.e. barramundi and prawns) and develop markets for other species during the peak tourism period
4. An understanding of seafood supply chain opportunities based on the food service sector and consumer values
5. Established that seafood labelling is supported by the consumer and is an important value consideration when purchasing seafood based meals
6. Identified the need to better clarify the meaning/definition of particular labelling tags; i.e. local, regional, imported to better inform consumers
7. There is consumer support for better labelling and this can be done at a number of levels (voluntary, codes and/or legislatively)
8. Valuable lessons for other jurisdiction who may be considering introducing labelling legislation.

In April 2011, the Beachfront will remove baby octopus from the seafood platter so that the labelling on the menu can remain local.

Justin Whitrow, Beachfront Hotel

The project has delivered the following benefits to the **Food Service Sector;**

1. Increased understanding of supply issues faced by the food service sector and opportunity to work with the seafood industry and the NTG to address these issues
2. Raised awareness of seafood labelling laws
3. Provided food service sector an opportunity to review how they advertise seafood dishes and capitalise on marketing opportunities identified by consumer surveys
4. Highlights the highly transient nature of the industry and the challenges this places on staff and consumer education
5. Improved understanding of what drives consumer choices when purchasing seafood
6. Significant opportunity for the sector to positively influence the direction of consumer choice and improve profit margins on seafood meals.
7. Provided for the inclusion of seafood labelling education material in CDU Commercial Cookery course.

The project has delivered the following benefits to the **NTG and Other Jurisdictions;**

1. Identified the unique and successful direct line of communication that was possible with the food service sector through the Fish Retailer licensing database
2. An understanding of the compliance rate of venues with the labelling requirements
3. Insight into any difficulties in the food services sector with compliance with the labelling requirements.
4. An increased understanding of the costs to comply with seafood labelling legislation
5. Recognised the need for ongoing education campaigns which will need to be tailored to meet food service sector and consumer needs (i.e. highly mobile staff, transient populations and reliance on tourism)
6. Increased understanding that consumers are supportive of seafood labelling and it is a key decision maker
7. Identified the need to ensure clarity of definitions and message across groups so as to better inform consumer.
8. Identified opportunities for food service venues to promote seafood labelling, with regard to identifying the Origin of product (i.e. local, regional, Australian), as well as complying with legislation relating to the use of imported product
9. Raised awareness of seafood labelling laws and the need for operators to be able to provide clear, concise information to their staff and customers.
10. Valuable lessons for other jurisdiction who may be considering introducing labelling legislation.

9. FURTHER DEVELOPMENT

The report will be provided to a range of key stakeholders across Australia as part of enhancing understanding at a Territory and national level as to the costs, impacts, challenges and opportunities that labelling laws such as those in place in the NT may have. Stakeholders will include seafood industry councils across Australia, individual across the seafood supply chain, fishery agencies, seafood marketing groups, CDU, Australian Culinary Federation and the Australian Hotels Association (AHA).

The NTSC and NTG will undertake ongoing discussions about means to improve the delivery of the objectives of the labelling laws, seek clarity around definitions, and develop collaborative compliance programs. Compliance is particularly relevant due to the high turnover of staff, the transient nature of Darwin residents, and the high level of tourism – a strategic plan will be required to maintain high compliance rates and improve consumer awareness.

As part of its curriculum, the CDU Commercial Cookery course will continue to provide culinary students with information relating to the labelling laws.

On release of the final report, media events will be undertaken between the NTG, NTSC, Food service venue representatives and the ACF NT. A number of additional media opportunities are anticipated on release of the final report.

The NTSC will investigate opportunities identified through the survey to improve market penetration for its members and build supply chain opportunities.

The informative labelling magnets will continue to be provided to Fish Retail Licensees.

An article will be produced for inclusion in the FRDC FISH magazine along with suitable copy for industry websites and NT Australian Hoteliers Association Magazine.

10. PLANNED OUTCOMES

The project has provided the following planned outcomes;

- A better understanding of the trends, quantity and origin of seafood usage in Darwin
- An understanding of the impacts of Seafood labelling requirements on fish retailers
- Increased awareness of the impact of labelling on consumer choice
- Increased awareness of seafood labelling requirements by the public and food service sector
- Enhanced communication between industry, seafood wholesalers and fish retailers
- The NTSC and DoR being recognised as a leader in providing first hand insight into seafood Labelling Laws.
- Increased the understanding of factors influencing seafood purchases by consumers and food service establishments
- Outputs have provided the NTG, Industry and other stakeholders with a greater understanding of the impacts of the laws and opportunities to improve its operation
- An analysis of impacts of labelling requirements on consumer choice
- The provision of advice on the impacts of the seafood labelling laws to DoR
- An executive summary for wider distribution
- A final FRDC report.

In addition the following outputs were delivered;

- A targeted training program within the seafood component of the CDU Commercial Cookery course
- Production and distribution of magnets to fish retailers which articulates the seafood labelling requirements

Although the project ran smoothly there are some opportunities to refine the methodology if such an exercise was to be undertaken in another jurisdiction or if there was a proposal to significantly alter the current legislation in the NT. Possible improvements and considerations can be summarised as follows;

- Undertake a pre-implementation survey to gain base line data
- Initiate the first phase of research within 6-12 months of the legislation being introduced (due to the considerable staff turnover there was often a challenge to identify a key contact with the intimate knowledge of the impact of the changed legislation 16 months on)
- Reduce the survey waves to 3 (not 5) over a 12 month period whilst still ensuring that seasonality is taken into account - this goes for consumer and food sector surveys (the trends in data will still be obtained but the strain on resources and intrusion into commercial business operations will be reduced)
- Increase the sample size of food service venues if sub data group analysis is required
- Consider a random sample group for the food service sector, rather than a 'selected' sample
- Consider expanding the scope to include detailed research on a broader range of issues surrounding labelling (local, regional, Australian, farmed/wild, ecolabelling etc)
- Specifically for the NT, broaden the geographic scope for the research (in this case include Katherine to Alice Springs) to receive a more accurate picture of the impact of a territory wide law.

11. CONCLUSION

The NT fish retailer seafood labelling laws had been in place for 16 months when this project commenced. The project sought to measure the impact the labelling laws were having along the supply chain, and whether the labelling laws had lead to changes in seafood purchasing behaviour at a food supply level, as well as with consumers.

The survey results demonstrated a high level of consumer support for seafood labelling laws that identify imported seafood. The survey findings highlighted supply chain challenges and opportunities for the seafood industry and food service sector plus a number of issues in respect to the impacts the labelling laws had on the food service sector and consumers which are discussed briefly below.

The survey data provided a unique insight into the quantity and origin of seafood sold in a range of food service outlet establishments in the Darwin region, and thereby provided a better understanding of the trends and usage of seafood in Darwin. The data showed that the majority of retailers use Australian product where possible and top up from other sources to meet peak demand and fill gaps. Results also showed that the source of seafood did not change dramatically as a result of the labelling laws, but there has been a drop in the use of imported product provided by seafood suppliers to fish retailers.

Findings were that the labelling laws were generally supported by both the food service sector and consumers. However there was a general lack of awareness from both groups that the legislation was in place, and a degree of confusion as to what the labelling laws involved.

Much of this confusion is brought about when seafood is unlabelled, therefore resulting in consumers being unable to clearly determine where the seafood comes from. This was an issue prior to when the NT seafood labelling legislation came into force but the new labelling laws do not stipulate that Australian seafood should be labelled, therefore leaving an avenue for this confusion to continue.

Subsequently there is a greater reliance on ongoing education to explain the laws to the relatively transient population and the large number of tourists visiting the NT. A possible solution would be to legislate that all seafood product is labelled with either its Country of Origin or alternatively as Australian or imported. Such an approach would simplify the educational component of any compliance program, as all product origin would be identified and consumers would be fully informed (if they wished). Food service providers would not need to continually train staff as to the vagaries of the laws. The alternative is to leave the legislation as it is and develop targeted, tailored, ongoing and updated educational programs for the various sectors so as to increase awareness and compliance with the current labelling requirements (i.e. if seafood is not labelled it is imported).

The survey also showed that labelling laws influence consumer choice, and it was rated as a key decision factor - simple concise labelling would ensure the relevant information is provided. The influence of tourism activity on menus generally lead to an increase in volume of seafood sales, and this increase was covered largely by imported product.

The consumer survey showed that after freshness, country of origin is the second most influential factor for consumers when choosing seafood, in any type of venue. Survey results also showed that consumers were willing to pay a premium for seafood labelled 'local'. Although general awareness of the existing labelling laws was low, after being explained what the laws were, 82% of respondents indicated that if they were aware of and understood the labelling laws, it would significantly influence their choice of seafood purchase. This reiterates the value of having labelling laws clearly and consistently detailed at the point of sale.

The cost for the food service sector to implement and comply with the legislation was generally not high (average of $603), although a small number of businesses initially spent over a thousand dollars updating menu boards etc. Businesses however, appeared to adjust quickly, with the vast majority being in a position to comply with the legislation within a month of its implementation. Major concerns from this sector related to having to update and change menus/special boards due to issues with obtaining consistent supply of 'local' product, and the need for the ongoing training of staff. As the food service sector has a considerable staff turnover, knowledge of labelling laws tended to be frequently lost to the organisation, therefore necessitating ongoing and proactive induction and education programs.

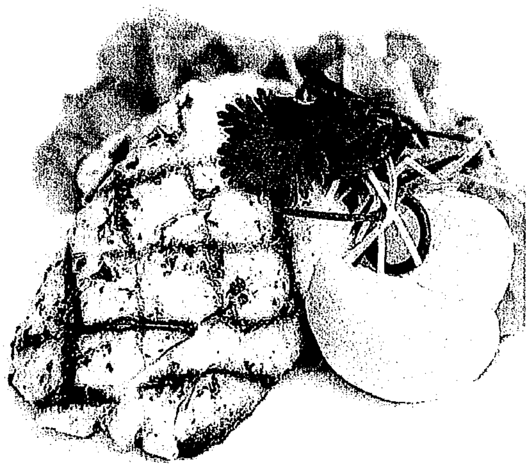
The NTG Fish Retailer licensing system provided an extremely useful mechanism for making initial contact with the food sector participants in the project which could have been problematic if the database was not available. This type of project (and the education aspects of labelling laws) may be more difficult in a larger environment, especially one without a good handle on those involved in the seafood service sector who sell seafood.

The project methodology, using a quantitative approach involving face-to-face surveys of two specific groups; worked well, and the use of five waves of surveys, over a 12 month period allowed the survey to take into account Darwin's distinct seasonal activity based around the tourism industry and local fishing fleet activity. The number of waves, if the survey was to be repeated in the NT or elsewhere, could be reduced, and a broader range of questions relating to impacts of labelling on consumer choice (e.g. sustainability, ecolabelling, farmed/wild) could be included.

The survey also highlighted some areas that need further work, such as understanding the seafood supply chain better to improve access to local species, understanding the current barriers, and understanding the drivers for choice from a supply/purchase perspective.

There were also a number of unplanned outcomes that developed during the life of the project. These included the development of a targeted training program within the seafood component of the CDU Commercial Cookery course and the production and distribution of magnets to fish retailers, which articulate the seafood labelling requirements.

The project successfully achieved its objectives and the take home messages are that consumers respond positively to seafood labelling, that business can readily adapt to such laws, that legislation needs to be simple and concise, or extensive educational programs will be required to obtain a high level of consumer awareness, and that the fishing and seafood industry can achieve positive outcomes by proactive labelling of domestic product.



I believe we should implement the rules across Australia and enforce compliance.

Gertrude, Moorish Café

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APPENDICES

APPENDIX I: Intellectual Property

No intellectual property was developed as part of this project. The knowledge gained through this project is shared between the FRDC and the NTSC and is available to the broader Australian fishing and seafood industry and the Food service sector.

APPENDIX II: Staff

The following persons were involved with this project:

Chris Calogeras	C-AID Consultants	Principal Investigator
Katherine Sarneckis	NTSC	Co-investigator
Leonie Cooper	DoR	Co-investigator
T. Y. Lee	ACF (NT)	Co-investigator
Suzanne Morgan	Suzanne Morgan Marketing	Survey Consultant
Valerie Smith	Valerie Smith	Research Analyst
Irawan	NTSC	Consumer Researcher
Toni Crookes	DoR	Consumer Researcher
John Maccartie	NTSC	Consumer Researcher

APPENDIX III: Project Steering Committee

T. Y. Lee	President	ACF (NT)
Leonie Cooper	Senior Policy Officer	DoR
Chris Calogeras	Director	C-AID Consultants
Katherine Sarneckis	CEO	NTSC

APPENDIX IV: Northern Territory Licence Conditions

SPECIFIC

FISH TRADER/PROCESSOR LICENCE CONDITIONS

Fisheries Act 1988

1. **The licence holder must comply with all applicable Northern Territory laws or by-laws that may be in place and amended from time to time, including but not limited to Section 20 of the *NT Food Act* relating to the Australian New Zealand Food Standards Code.**

2. **FISH TRADER/PROCESSOR MAY PROCESS AND RESELL**

2.1 The licensee may purchase fish or aquatic life for processing and resale.

2.2 The licensee shall not possess or sell commercially unsuitable mud crabs.

3. **PURCHASE OF AND SALE OF FISH**

3.1 The licensee shall not purchase fish or aquatic life for processing and resale except –

a) from a person who holds a commercial fishing licence permitting the taking of that fish or aquatic life;

b) from a person who holds an appropriate licence under a law of the Commonwealth, a State or another Territory of the Commonwealth;

c) from a Fish Trader/Processor licensee, or a person who holds a licence granted for the purposes of Part 10;

d) where the fish is live fish and the Territory was not the first landing point of the fish or aquatic life,

e) pursuant to a permit granted under the Act; or

f) from an interstate or overseas supplier.

3.2 The licensee shall not sell fish or aquatic life obtained from an Aboriginal Coastal licensee.

3.3 The licensee shall not sell fish or aquatic life obtained from a Bait Net Fishery licensee unless it is labelled with the expression "Bait only - not for human consumption".

3.4 The licensee shall not sell live fish to an Aquarium Fishing/Display licensee or an Aquarium Trader licensee purchasing fish for the purposes of that licence.

3.5 The licensee shall not sell whole fish that has been imported from overseas.

3.6 The licensee shall not knowingly sell imported green crustaceans as bait or fish food. (Also refer to 6 below)

4. **LABELLING OF FISH**

4.1 The licensee shall ensure that all fish for sale which the licensee purchases for sale from an aquaculture facility shall have attached to them or be accompanied by a statement indicating –

a) the number of the licence under which the fish were bred or held;

b) that the fish is the product of an aquaculture facility situated in the Northern Territory; and

c) such other information as required by the Director,

d) and shall not sell such fish, other than fish forming part of a meal or such fish sold for use as bait, unless the fish is labelled in accordance with this condition.

4.2 Licensee is not to contravene any Northern Territory laws or by-laws that may be in place from time to time (refer to attachment for examples).

5. PLACE OF PROCESSING

5.1 The licensee shall not process fish for sale except at a place specified on the licence.

5.2 The licensee shall publicly display a copy of the attached licence, in a prominent position, at each of the places specified on the licence.

5.3 Fish at the place or places specified on this licence shall be **deemed to be fish for sale.**

6. EXPORT OF FOOD

If the place in respect of which a Fish Trader/ Processor licence is granted is permitted, licensed, registered, or otherwise certified under an Act of the Commonwealth as approved premises for the production of food for export, the terms of the Act shall, in relation to standards of health and hygiene on those premises, apply to the exclusion of the *Fisheries Act*, Fisheries Regulations or an instrument of a legislative or administrative character made under the *Fisheries Act*, but shall not prevent the entry onto that place of officers appointed under the *Fisheries Act.*

7. DISPOSAL OF FISH AND AQUATIC LIFE

It is a condition of this licence that all fish or aquatic life deemed unfit for human consumption or bait is to be disposed of in an appropriate manner as described in any other laws or by-laws that may be in place.

8. RETURNS

8.1 The licensee shall keep such accounts and records as are necessary to enable the supply of information in relation to fish purchased, processed or sold.

8.2 The licensee shall supply to the Director each month, within 28 days after the expiry of the month which the return is made, in a completed form approved by the Director, the information required by the approved form in relation to fish purchased, processed or sold.

9. APPLICATION

Operations performed under this licence will conform with the above conditions as well as with existing Fisheries legislation.

SPECIFIC

FISH RETAILER LICENCE CONDITIONS

Fisheries Act 1988

1. PURCHASE OF FISH

1.1 The licensee shall not purchase fish or aquatic life for resale except –

a) from a person who holds a commercial fishing licence permitting the taking of that fish or aquatic life;

b) from a person who holds an appropriate licence under a law of the Commonwealth, a State or another Territory of the Commonwealth;

c) from a person who holds a Fish Trader/Processor licensee or a person who holds a licence granted for the purposes of Part 10;

d) where the fish is live fish and the Territory was not the first landing point of the fish or aquatic life, pursuant to a permit granted under the Act; or

e) from an interstate or overseas supplier.

2. SALE OF FISH

2.1 The licensee may process fish but shall not sell fish, whether or not processed, except to a person not purchasing them for the purpose of resale.

2.2 The licensee shall not possess or sell commercially unsuitable mud crabs.

2.3 The licensee shall not sell fish or aquatic life obtained from an Aboriginal Coastal licensee.

2.4 The licensee shall not sell fish or aquatic life obtained from a Bait Net Fishery licensee unless it is labelled with the expression "Bait Only - not for human consumption".

2.5 The licensee shall not sell live fish to an Aquarium Fishing/Display licensee or an Aquarium Trader licensee purchasing fish for the purposes of that licence.

2.6 The licensee shall not sell whole fish that has been imported from overseas.

2.7 The licensee shall not knowingly sell imported green crustaceans as bait or fish food. (Also refer to 5.1 below)

3. ADVERTISING FISH OR AQUATIC LIFE FOR SALE

3.1 Any fish or aquatic life advertised for sale for the purpose of being consumed, and that fish or aquatic life has not been taken in Australia; it must be accompanied with a statement declaring that it is imported.

3.2 Where a mixed seafood product (i.e a product containing 1 or more seafood products) is advertised for sale for the purpose of being consumed, and the mixed seafood product contains seafood product not taken in Australia, it must be accompanied with a statement declaring that it contains imported products.

3.3 The statement must be no less than 65% of the height of the characters used in the title of the fish, aquatic life, or mixed seafood product advertised for sale.

3.4 For the purpose of these Licence conditions, "advertised for sale" means, but is not limited to, being included on a menu, display board or pamphlet.

4. LABELLING OF FISH FROM AQUACULTURE FACILITY

4.1 The licensee shall ensure that all fish for sale that the licensee purchases for sale from an aquaculture facility shall have attached to them or be accompanied by a statement indicating –

a) the number of the licence under which the fish were bred or held;

b) that the fish is the product of an aquaculture facility situated in the Northern Territory; and

c) such other information as required by the Director, and shall not sell such fish, other than fish forming part of a meal or such fish sold for use as bait, unless the fish is labelled in accordance with this condition.

5. PLACE OF PROCESSING/PREPARATION

5.1 The licensee shall not process/prepare fish for sale except at a place specified on the licence.

5.2 The licensee shall display, in a prominent position at each of the places specified on the licence, the number and expiry date of the licence.

5.3 Fish at the place or places specified on this licence shall be deemed to be fish for sale.

5.4 Licensee is not to contravene any other laws or by-laws that may be in place.

6. DISPOSAL OF FISH AND AQUATIC LIFE

6.1 It is a condition of this licence that all fish or aquatic life deemed unfit for human consumption or bait is to be disposed of in an appropriate manner as described in any other laws or by-laws that may be in place.

7. RECORDS

7.1 The licensee shall keep such accounts and records in relation to any transaction relating to fish processed or traded by the licensee under the authority of the licence.

8. APPLICATION

8.1 Operations performed under this licence will conform with the above conditions as well as with existing Fisheries legislation.

APPENDIX V: Consumer Survey Sheet

CONSUMER SURVEY

Thank you for taking the time to complete this survey, which will be used to track issues regarding seafood consumption in the Northern Territory. Individual responses will be kept confidential by the NT Seafood Council. Please tick or circle the option which best matches your response.

OFFICE USE ONLY

i. Date of Survey:____________ ii. Location:____________ iii. Time:______

DEMOGRAPHICS

1. Where do you usually live?

☐1 Darwin area (go to Q2) ☐2 Other NT (go to Q3) ☐3 Interstate (go to Q3) ☐4 Overseas (go to Q3)

2. How long have you lived in Darwin? (go to Q4)

☐1 Less than 6 months ☐2 6 months to 1 year ☐3 1-3 years ☐4 More than 3 years

3. How long have you been in Darwin on this visit?

☐1 Less than 3 nights ☐2 3-5 nights ☐3 6-14 nights ☐4 2 weeks to 3 months ☐5 More than 3 months

4. On average, how often do you eat seafood (dining out or take away – not cooked at home)?

☐1 Three times a week or more ☐2 Twice a week ☐3 Once a week ☐4 Once a fortnight ☐5 Once a month or less ☐6 Never (go to Q15)

5. When you see seafood labelled "local", what do you understand by this?

____

____

____

6. If you see seafood on a menu without its country of origin being indicated, where do you assume it is from?

☐1 Darwin ☐2 NT ☐3 Australia ☐4 Overseas ☐5 Don't know

7. Are you aware of seafood labelling requirements for food outlets in the Northern Territory?
Please select the number which corresponds with the level to which you agree.

Not at all aware → Very aware

1 2 3 4 5

If you selected 1 (not at all aware), please go to Q9; else go to Q8.

8. How did you hear about the NT seafood labelling laws?

☐1 NT Fisheries ☐2 NT Seafood Council ☐3 Fishmongers
☐4 Local Media - TV ☐5 Local Media - Newspapers ☐6 Local Media - general
☐7 Internet ☐8 Through dining outlets ☐99 Other: __________

9. When purchasing seafood in a restaurant or café, please indicate the extent to which the following factors are important to your selection.

	Very unimportant	→			Very important
Country of origin	1	2	3	4	5
Region of origin	1	2	3	4	5
Freshness	1	2	3	4	5
Price	1	2	3	4	5
Species	1	2	3	4	5
Wild-caught versus farmed	1	2	3	4	5
Menu option	1	2	3	4	5
Sustainable fisheries	1	2	3	4	5

10. When purchasing seafood <u>in at a take-away outlet</u>, please indicate the extent to which the following factors are important to your selection.

	Very unimportant	→			Very important
Country of origin	1	2	3	4	5
Region of origin	1	2	3	4	5
Freshness	1	2	3	4	5
Price	1	2	3	4	5
Species	1	2	3	4	5
Wild-caught versus farmed	1	2	3	4	5
Menu option	1	2	3	4	5
Sustainable fisheries	1	2	3	4	5

11. How important is choosing Australian-caught fish on the following occasions?

	Very unimportant	→			Very important
Take-away meal mid-week	1	2	3	4	5
Restaurant meal	1	2	3	4	5
Café meal	1	2	3	4	5

12. Please rank the menu items below on how likely you would be to purchase them, from 1 (most likely to buy) to 4 (least likely to buy).

☐ Kostas' Café
Barra & chips $18

☐ Bluebird Café
Barramundi & chips (product of Thailand) $16

☐ Bob's Seafood Specials
Barramundi & chips $18

☐ Kath's Seafood Café
Local wild caught barramundi & chips $20

13. Since November 2008 food outlets in the Northern Territory have been required to label all imported seafood sold for public consumption. Seafood not harvested from Australian waters is to be clearly labelled "imported". Dishes which contain multiple seafood ingredients, one or more of which have not been harvested in Australian waters, are to be labelled "contains imported seafood products". Would this knowledge of Country of Origin Labelling laws influence your choice of seafood purchases in the immediate future?

☐1 Yes ☐2 No

14. Are you aware of the SUPPORT NT CAUGHT **campaign?**

☐1 Yes ☐2 No

APPENDIX VI: Food Sector Survey Sheet

FOOD SERVICE SECTOR SURVEY

On 11 November 2008 new labelling laws were introduced, requiring seafood to be labelled "imported" when Australian product has not been used. This survey aims to track the impacts on seafood consumption at dining venues arising from these new laws. Individual responses will be kept confidential by the NT Seafood Council.

OFFICE USE ONLY

i. **Survey Wave:** 1

ii. **Respondent details**

Company: ____________

Name: ____________

Position: ____________

DEMOGRAPHICS

1. What characteristics best describe this business?

Location: 1 Darwin CBD 2 Darwin Suburbs

Menu Style: 1 Australian 2 European 3 Asian 99 Other:______

Dining Style: 1 Restaurant 2 Club/ Pub 3 Takeaway 99 Other:______

2. Who controls the menu in this business?

1 Head chef 2 Food/ beverage manager 3 Venue owner 99 Other:_______

3. Who controls the purchase of seafood in this business?

1 Head chef 2 Food/ beverage manager 3 Venue owner 99 Other:_______

4. On average, how many times per year do you change the menu?

1 Once or twice per month 2 Four times per year 3 Once or twice per year 4 Don't change

5. Do you offer fish or seafood specials on the menu?

1 Always 2 Mostly 3 Sometimes 4 Never

6. Why do you have seafood specials on the menu?

1 Trial new idea before putting on menu 2 Innovation 3 Chefs don't get bored 4 Customers don't get bored

5 Seasonal product 6 Customer demand 99 Other:____________________

7. Who are your key suppliers? [DON'T READ OUT RESPONSES]

1	All seafood Hibiscus	2	Raptis and Sons	3	Frasers Natural Supply Fish	4	Darwin Fish Markets
5	Mr Barra	6	Mr Prawn	7	Beywood	8	Y&T Bradley
9	Franks Seafood	10	Fraser Fisheries	11	Fisher Wholesale	12	Seafresh
13	Sealanes	14	Austop Fisheries	15	NT Fish	16	Neptunes Warehouse
17	Independent Grocers	99	Other:____________________				

8. How many covers(meals) would you serve per week at this time of year?

1	70-150	2	151-250	3	251-350	4	351-450
5	451-999	6	1,000-1,500	7	More than 1,500		

9. What is your estimated clientele breakdown at this time of year [Check adds to 100%]

NT residents ___% Interstate _____% International ___%

10. What proportion of your current menu items has seafood as the main ingredient?____%

11. Prior to the new labelling laws being introduced in November 2008, what proportion of your menu items had seafood as the main ingredient?______%

12. Prior to the new labelling laws being introduced in November 2008, what species were the main ingredients? Has this changed?________________________________

SEAFOOD USAGE

13. Please fill in the following table based on average seafood usage per week at this time of the year. [Check each attribute adds to 100%]

Species	Average volume per week (kg)	Form (%)		Origin (%)					Whole/ Filleted (%)	
		Fresh	Frozen	NT	Australia	Imported	Combination	Not sure	Whole	Fillet/ pre-prepared
Prawns										
Calamari										
Bugs										
Oysters										
Mud Crabs										
Mussels										
Other shellfish										
Barramundi										
Black Jewfish										
Goldband Snapper										
Saddletail Snapper										

Species	Average volume per week (kg)	Form (%)		Origin (%)					Whole/ Filleted (%)	
		Fresh	Frozen	NT	Australia	Imported	Combination	Not sure	Whole	Fillet/ pre-prepared
King Threadfin										
Atlantic Salmon										
Coral Trout										
Tuna										
Basa										
Hoki										
Whiting										
Other fish										

14. What seafood would you like to use more of?

____

____

15. If you were considering increasing your IMPORTED seafood on the menu, please indicate the importance of each attribute.

(Please select the number which corresponds with the level to which you agree)	Very unimportant	→			Very important	Not applicable
Cost	1	2	3	4	5	0
Taste	1	2	3	4	5	0
Flexible portion packaging	1	2	3	4	5	0
Readily available year round	1	2	3	4	5	0
My supplier stocks it	1	2	3	4	5	0
Consumers demand	1	2	3	4	5	0
Consistent high quality	1	2	3	4	5	0
Consistent portion size	1	2	3	4	5	0
Profit margin	1	2	3	4	5	0
Stable pricing	1	2	3	4	5	0
Shelf-life	1	2	3	4	5	0
Menu variety	1	2	3	4	5	0

16. If you were considering increasing your LOCAL seafood on the menu, please indicate the importance of each attribute.

(Please select the number which corresponds with the level to which you agree)	Very unimportant	→			Very important	Not applicable
Cost	1	2	3	4	5	0
Taste	1	2	3	4	5	0
Flexible portion packaging	1	2	3	4	5	0
Readily available year round	1	2	3	4	5	0
My supplier stocks it	1	2	3	4	5	0
Consumers demand	1	2	3	4	5	0
Consistent high quality	1	2	3	4	5	0
Consistent portion size	1	2	3	4	5	0
Profit margin	1	2	3	4	5	0
Stable pricing	1	2	3	4	5	0
Shelf-life	1	2	3	4	5	0
Menu variety	1	2	3	4	5	0

IMPACT OF LABELLING LAWS

17. How do you identify the country of origin of seafood you serve? Please indicate the importance of each method.

			Very unimportant →				Very important
Printed menu explanation	1 Yes	2 No	1	2	3	4	5
Specials board	1 Yes	2 No	1	2	3	4	5
Seafood promotions	1 Yes	2 No	1	2	3	4	5
Advertising/ media promotions	1 Yes	2 No	1	2	3	4	5
Website	1 Yes	2 No	1	2	3	4	5
Other:________________________	1 Yes	2 No	1	2	3	4	5

18. Many businesses find an advantage in labelling all Australian seafood as "local", although it is not a requirement of labelling laws to do so. What proportion of your local product is labelled "local"?

1 100%   2 50%   3 25%   4 None

19. What species do you always label as local? [TICK ALL THAT APPLY]

1 Barramundi (NT)   2 Salmon (TAS)   3 Oysters (Coffin Bay)   4 Prawns (NT)

5 Prawns (Other)   6 Tuna   99 Other: ________________________

20. Thinking about the methods you use to advise country of origin, how much would this business have spent on implementing the labelling laws?

1 Up to $100   2 $101 - $250   3 $251 - $500   4 More than $501

21. Why do you think the country of origin labelling laws were introduced?

1 Consumer demand for more information on origin of seafood
2 Consumer demand for fresher eating options
3 Fishing industry demand
4 Trade Practices Act
5 Quality management trends
6 Government led initiative
7 All of the above
99 Other: ________________________

22. How were you advised that the origin of labelling laws were being introduced in the NT?

1 Letter of Advice from NT Fisheries
2 Request to comment from Fisheries Research and Development Corporation
3 Fisheries Research and Development Corporation Fact Sheet
4 NT Seafood Council Website
5 Support NT Caught Campaign
6 Industry Membership Newsletters
7 NT Police Marine Enforcement visit
8 Local Media Stories
99 Other: ____________

23. How long did it take you to comply with the origin of labelling laws after the legislation was introduced?

1 Within 1 month
2 1-3 months
3 3-6 months
4 6-12 months
5 Have not yet fully complied

24. Are there any species you have removed from your menu since November 2008 due to labelling laws?

1 Yes:________________
2 No (go to Q27)

25. How difficult was it to research new menu options and purchase ingredients?

Not at all difficult → Very difficult

1 2 3 4 5

26. What sources did you use to come up with new menu options? [TICK ALL THAT APPLY]

1 Own recipes
2 Books
3 Internet
4 Magazines
5 Eating out at other restaurants
6 NT Seafood Council
7 NT Fisheries
8 Television
99 Other:______________________________

27. To what extent do you think consumers understand the country of origin labelling laws?

(Please select the number which corresponds with the level to which you agree)	Do not understand very well →				Understand very well
NT residents	1	2	3	4	5
Visitors from interstate or overseas	1	2	3	4	5

28. Do you have any further comments you would like to make about the country of origin labelling laws?

____

____

____

Thank you for taking the time to participate in this survey from the NT Seafood Council. Your comments and suggestions are greatly appreciated and will assist in improving the Territory seafood industry.

APPENDIX VII: Consumer Survey Results

Table 1: Response details

	Date of Survey	Intercepts	Responses fitting survey criteria	Intercepts screened out from survey
Wave 1	16 April 2010	33	33	0
Wave 2	20 July 2010	63	61	2
Wave 3	12 October 2010	69	64	5
Wave 4	28 January 2011	60	60	0
Wave 5	24 March 2011	65	61	4
Total		290	279	11

Note: The survey design was targeting at respondents who consume seafood from take-away or other dining venues. Intercepts who indicated they never consumed seafood from the food service sector were screened out from participating in the survey.

Table 2: Where do you usually live?

	Wave 1		Wave 2		Wave 3		Wave 4		Wave 5		Total	
	Number	%	Number	%	Number	%	Number	%	Number	%	Number	%
Darwin area	23	70%	40	66%	49	77%	45	75%	51	84%	208	75%
Other NT	1	3%	0	0%	2	3%	5	8%	4	7%	12	4%
Interstate	4	12%	19	31%	11	17%	7	12%	3	5%	44	16%
Overseas	3	9%	2	3%	2	3%	3	5%	3	5%	13	5%
Not stated	2	6%	0	0%	0	0%	0	0%	0	0%	2	1%
Total	33	100%	61	100%	64	100%	60	100%	61	100%	279	100%

Table 3: How long have you lived in Darwin?

	Wave 1		Wave 2		Wave 3		Wave 4		Wave 5		Total	
	Number	%	Number	%	Number	%	Number	%	Number	%	Number	%
Less than 6 months	2	9%	6	15%	6	12%	3	7%	2	4%	19	9%
6 months to 1 year	0	0%	2	5%	3	6%	0	0%	2	4%	7	3%
1-3 years	3	13%	7	18%	6	12%	7	16%	6	12%	29	14%
More than 3 years	17	74%	24	60%	33	67%	34	76%	40	78%	148	71%
Not stated	1	4%	1	3%	1	2%	1	2%	1	2%	5	2%
Total Darwin residents	23	100%	40	100%	49	100%	45	100%	51	100%	208	100%

Table 4: How long have you been in Darwin on this visit?

	Wave 1		Wave 2		Wave 3		Wave 4		Wave 5		Total	
	Number	%	Number	%	Number	%	Number	%	Number	%	Number	%
Less than 3 nights	1	10%	12	57%	2	13%	3	20%	1	10%	19	27%
3-5 nights	2	20%	4	19%	8	53%	2	13%	3	30%	19	27%
6-14 nights	1	10%	4	19%	2	13%	4	27%	2	20%	13	18%
2 weeks to 3 months	2	20%	1	5%	2	13%	1	7%	2	20%	8	11%
More than 3 months	3	30%	0	0%	1	7%	1	7%	0	0%	5	7%
Not stated	1	10%	0	0%	0	0%	4	27%	2	20%	7	10%
Total non-Darwin residents	10	100%	21	100%	15	100%	15	100%	10	100%	71	100%

Table 5: On average, how often do you eat seafood (dining out or take away - not cooked at home)?

	Wave 1		Wave 2		Wave 3		Wave 4		Wave 5		Total	
	Number	%	Number	%	Number	%	Number	%	Number	%	Number	%
Three times a week or more	5	15%	3	5%	5	8%	4	7%	4	7%	21	8%
Twice a week	2	6%	3	5%	10	16%	8	13%	9	15%	32	11%
Once a week	4	12%	13	21%	21	33%	17	28%	13	21%	68	24%
Once a fortnight	7	21%	17	28%	5	8%	11	18%	12	20%	52	19%
Once a month or less	14	42%	23	38%	23	36%	19	32%	22	36%	101	36%
Not stated	1	3%	2	3%	0	0%	1	2%	1	2%	5	2%
Total	33	100%	61	100%	64	100%	60	100%	61	100%	279	100%

Table 6: When you see seafood labelled "local", what do you understand by this? (unprompted response)

	Wave 1		Wave 2		Wave 3		Wave 4		Wave 5		Total	
	Number	%	Number	%	Number	%	Number	%	Number	%	Number	%
Caught/farmed locally	7	21%	12	20%	22	34%	6	10%	7	11%	54	19%
Caught/farmed around Darwin	3	9%	6	10%	10	16%	9	15%	11	18%	39	14%
Caught/farmed in the NT	6	18%	22	36%	18	28%	32	53%	31	51%	109	39%
Caught/farmed in Australia	7	21%	17	28%	8	13%	13	22%	9	15%	54	19%
Not from Asia	2	6%	1	2%	0	0%	0	0%	0	0%	3	1%
Don't know	1	3%	1	2%	0	0%	0	0%	0	0%	2	1%
Don't believe/Don't trust/Other cynical response	4	12%	1	2%	0	0%	0	0%	0	0%	5	2%
Other	1	3%	1	2%	6	9%	0	0%	3	5%	11	4%
Not stated	2	6%	0	0%	0	0%	0	0%		0%	2	1%
Total respondents who eat seafood	33	100%	61	100%	64	100%	60	100%	61	100%	279	100%

Table 7: If you see seafood on the menu without a "local" or "imported" label, where do you assume it is from?

	Wave 1		Wave 2		Wave 3		Wave 4		Wave 5		Total	
	Number	%	Number	%	Number	%	Number	%	Number	%	Number	%
Darwin	1	3%	2	3%	5	8%	5	8%	6	10%	19	7%
NT	3	9%	2	3%	3	5%	3	5%	1	2%	12	4%
Australia	8	24%	19	31%	10	16%	11	18%	15	25%	63	23%
Overseas	12	36%	26	43%	26	41%	21	35%	32	52%	117	42%
Don't know	7	21%	12	20%	18	28%	20	33%	7	11%	64	23%
Not stated	2	6%	0	0%	2	3%	0	0%	0	0%	4	1%
Total	33	100%	61	100%	64	100%	60	100%	61	100%	279	100%

Table 8: Are you aware of seafood labelling requirements for food outlets in the Northern Territory?

	Wave 1		Wave 2		Wave 3		Wave 4		Wave 5		Total	
	Number	%	Number	%	Number	%	Number	%	Number	%	Number	%
1 (Not at all aware)	9	27%	34	56%	26	41%	24	40%	23	38%	116	42%
2	3	9%	6	10%	9	14%	6	10%	3	5%	27	10%
3	7	21%	7	11%	12	19%	8	13%	8	13%	42	15%
4	7	21%	6	10%	6	9%	6	10%	12	20%	37	13%
5 (Very aware)	7	21%	8	13%	10	16%	16	27%	14	23%	55	20%
Not stated	0	0%	0	0%	1	2%	0	0%	1	2%	2	1%
Total	33	100%	61	100%	64	100%	60	100%	61	100%	279	100%
Mean	3.0		2.1		2.4		2.7		2.9		2.6	

Table 9: How did you hear about the NT seafood labelling laws?

	Wave 1		Wave 2		Wave 3		Wave 4		Wave 5		Total	
	Number	%	Number	%	Number	%	Number	%	Number	%	Number	%
NT Fisheries	1	4%	2	7%	4	11%	4	11%	4	11%	15	9%
NT Seafood Council	0	0%	2	7%	3	8%	7	19%	6	16%	18	11%
Fishmongers	0	0%	2	7%	1	3%	3	8%	3	8%	9	6%
Local Media – TV	0	0%	4	15%	6	16%	10	28%	6	16%	26	16%
Local Media – newspapers	6	25%	4	15%	6	16%	5	14%	8	21%	29	18%
Local Media – general	3	13%	4	15%	2	5%	7	19%	4	11%	20	12%
Internet	0	0%	0	0%	1	3%	3	8%	4	11%	8	5%
Through dining outlets	7	29%	5	19%	8	21%	15	42%	9	24%	44	27%
Other	3	13%	9	33%	6	16%	1	3%	2	5%	21	13%
Not stated	5	21%	2	7%	5	13%	2	6%	5	13%	19	12%
Total aware	24	100%	27	100%	38	100%	36	100%	38	100%	163	100%

Table 10: When purchasing seafood in a **restaurant or café**, please indicate the extent to which the following factors are important to your selection.

	Wave 1 Mean	Wave 2 Mean	Wave 3 Mean	Wave 4 Mean	Wave 5 Mean	Total Mean	
Country of origin	4.2	4.2	4.1	4.5	4.0	4.2	2nd most important factor
Region of origin	3.4	3.4	3.6	3.8	3.3	3.5	
Freshness	4.8	4.9	4.8	4.9	4.9	4.8	Most important factor
Price	4.0	3.6	3.8	3.7	3.7	3.7	
Species	3.9	4.1	3.7	3.9	3.9	3.9	3rd most important factor
Wild-caught versus farmed	3.6	3.3	3.7	3.6	3.3	3.5	
Menu option	3.7	3.8	3.7	3.7	3.7	3.7	
Sustainable fisheries	3.8	3.8	3.9	3.7	3.7	3.8	

Table 11: When purchasing seafood in a **take-away outlet**, please indicate the extent to which the following factors are important to your selection.

	Wave 1 Mean	Wave 2 Mean	Wave 3 Mean	Wave 4 Mean	Wave 5 Mean	Total Mean	
Country of origin	3.8	4.0	3.9	4.2	3.8	4.0	2nd most important factor
Region of origin	3.3	3.3	3.6	3.5	3.3	3.4	
Freshness	4.7	4.8	4.7	4.7	4.7	4.7	Most important factor
Price	3.9	3.5	3.9	3.9	3.7	3.8	3rd most important factor
Species	3.8	3.9	3.6	3.7	3.6	3.7	
Wild-caught versus farmed	3.5	3.3	3.6	3.6	3.2	3.4	
Menu option	3.5	3.7	3.5	3.6	3.4	3.6	
Sustainable fisheries	3.8	3.6	3.7	3.5	3.6	3.6	

Table 12: How important is choosing Australian-caught fish on the following occasions?

	Wave 1 Mean	Wave 2 Mean	Wave 3 Mean	Wave 4 Mean	Wave 5 Mean	Total Mean
Mid-week take-away meal	4.3	4.1	3.8	4.1	3.7	4.0
Restaurant meal	4.7	4.5	4.2	4.6	4.2	4.4
Café meal	4.4	4.2	4.1	4.5	3.9	4.2

Table 13: Please rank the menu items below on how likely you would be to purchase them, from 1 (most likely to buy) to 4 (least likely to buy).

	Wave 1 Mean	Wave 2 Mean	Wave 3 Mean	Wave 4 Mean	Wave 5 Mean	Total		
						Mean	% rated 1	% rated 4
Kostas' Café Barra & chips $18	2.9	3.0	2.8	2.9	3.0	2.9	4%	10%
Bluebird Café Barramundi & chips (product of Thailand) $16	3.7	3.6	3.8	3.7	3.7	3.7	4%	78%
Bob's Seafood Specials Barramundi & chips $18	1.7	1.8	1.8	1.8	1.7	1.8	31%	0%
Kath's Seafood Café Local wild caught Barramundi & chips $20	1.6	1.5	1.5	1.6	1.6	1.6	60%	6%
Not stated							2%	5%

Table 14: Since November 2008 food outlets in the Northern Territory hav ebeen required to label all imported seafood sold for public consumption. Seafood not harvested from Australian waters is to be clearly labelled "imported". Dishes which contain multiple seafood ingredients, one or more of which have not been harvested in Australian waters, are to be labelled "contains imported seafood products". Would this knowledge of seafood labelling laws influence your choice of seafood purchases in the immediate future?

	Wave 1		Wave 2		Wave 3		Wave 4		Wave 5		Total	
	Number	%	Number	%	Number	%	Number	%	Number	%	Number	%
Yes	26	79%	52	85%	56	88%	47	78%	49	80%	230	82%
No	6	18%	8	13%	6	9%	13	22%	12	20%	45	16%
Not stated	1	3%	1	2%	2	3%	0	0%	0	0%	4	1%
Total	33	100%	61	100%	64	100%	60	100%	61	100%	279	100%

SUPPORT NT CAUGHT

Table 15: Are you aware of the Support NT Caught campaign?

	Wave 1		Wave 2		Wave 3		Wave 4		Wave 5		Total	
	Number	%	Number	%	Number	%	Number	%	Number	%	Number	%
Yes	13	39%	14	23%	29	45%	22	37%	23	38%	101	36%
No	19	58%	47	77%	33	52%	38	63%	38	62%	175	63%
Not stated	1	3%	0	0%	2	3%	0	0%	0	0%	3	1%
Total	33	100%	61	100%	64	100%	60	100%	61	100%	279	100%

APPENDIX VIII: Food Service Sector Survey Results

Wave	Respondents
Wave 1	20
Wave 2	20
Wave 3	20
Wave 4	20
Wave 5	20

Business Demographics (Wave 1)

Table 1: What characteristics best describe this business?

Location	Frequency	%
Darwin CBD	14	70%
Darwin Suburbs	6	30%
Total	20	100%

Menu Style	Frequency	%
Australian	10	50%
European	3	15%
Asian	4	20%
Other	1	5%
Not stated	2	10%
Total	20	100%

Dining Style	Frequency	%
Restaurant	13	65%
Club/Pub	4	20%
Takeaway	3	15%
Total	20	100%

Table 2: Who controls the menu in this business?

	Frequency	%
Head Chef	11	55%
Food/Beverage Manager	1	5%
Venue owner	6	30%
Not stated	2	10%
Total	20	100%

Table 3: Who controls the purchase of seafood in this business?

	Frequency	%
Head chef	8	40%
Venue owner	6	30%
Head chef and venue owner combined	5	25%
Other	1	5%
Total	20	100%

Table 4: On average, how many times per year do you change your menu?

	Frequency	%
Four times per year	4	20%
Once or twice per year	9	45%
Don't change	7	35%
Total	20	100%

Table 5: Do you offer fish or seafood specials on the menu?

	Frequency	%
Always	4	20%
Mostly	3	15%
Sometimes	4	20%
Never	7	35%
Not stated	2	10%
Total	20	100%

Table 6: Why do you have specials on the menu? (multiple-choice response)

	Frequency	%
Trial new idea before putting on menu	5	45%
Innovation	5	45%
Chefs don't get bored	2	18%
Customers don't get bored	3	27%
Seasonal product	7	64%
Customer demand	5	45%
Total with seafood specials	11	100%

Seasonality

Table 7: How many covers (meals) would you serve per week at this time of year?

	Wave 1		Wave 2		Wave 3		Wave 4		Wave 5	
	Frequency	%	Number	%	Number	%	Number	%	Number	%
70-150	0	0%	0	0%	0	0%	1	5%	0	0%
151-250	0	0%	0	0%	1	5%	1	5%	0	0%
251-350	0	0%	0	0%	0	0%	2	10%	2	10%
351-450	1	5%	3	15%	0	0%	1	5%	0	0%
451-999	9	45%	5	25%	9	45%	10	50%	12	60%
1,000-1,500	7	35%	7	35%	8	40%	4	20%	3	15%
More than 1,500	2	10%	5	25%	1	5%	1	5%	3	15%
Not stated	1	5%	0	0%	1	5%	0	0%	0	0%
Total	20	100%	20	100%	20	100%	20	100%	20	100%

Table 8: What is your estimated clientele breakdown at this time of year?

	Wave 1 Mean	Wave 2 Mean	Wave 3 Mean	Wave 4 Mean	Wave 5 Mean
NT Residents	67%	51%	66%	67%	72%
Interstate	22%	32%	22%	24%	19%
International	11%	17%	12%	10%	9%
Total	100%	100%	100%	100%	100%

Seafood Usage

Tables 9a – 9e: Please fill in the following based on average seafood usage per week at this time of the year.
(All information provided is based on mean results).

Table 9a: Wave 1 (n=20; all respondents provided usage information)

Species	Average volume per week (kg)	Form (%)		Origin (%)			Whole/ Filleted (%)	
		Fresh	Frozen	NT	Australia	Imported	Whole	Fillet/ prepare
Prawns	27	5%	95%	14%	34%	53%	25%	75%
Calamari	25	0%	100%	0%	12%	88%	9%	91%
Bugs	1	0%	100%	0%	80%	20%	100%	0%
Oysters	27 dozen	67%	33%	0%	92%	8%	33%	67%
Mud Crabs	4	75%	25%	40%	40%	20%	100%	0%
Mussels	1	0%	100%	0%	0%	100%	NP	NP
Other shellfish	5	0%	100%	0%	38%	63%	29%	71%
Barramundi	47	13%	87%	68%	23%	10%	8%	92%
Black Jewfish	9	34%	66%	83%	17%	0%	0%	100%
Goldband Snapper	24	100%	0%	42%	58%	0%	60%	40%
Saddletail Snapper	2	0%	100%	100%	0%	0%	0%	100%
King Threadfin	8	24%	76%	100%	0%	0%	0%	100%
Atlantic Salmon	1	17%	83%	0%	50%	50%	0%	100%
Coral Trout	0	-	-	-	-	-	-	-
Tuna	<1	0%	100% (tinned)	0%	0%	100%	0%	100%
Basa	7	0%	100%	0%	0%	100%	0%	100%
Hoki	<1	0%	100%	0%	0%	100%	0%	100%
Whiting	<1	0%	100%	0%	100%	0%	0%	100%
Other fish	7							

Note: NP= Not Provided
Species with very low average volumes are based on tiny sample sizes (often n=1), so care must be used in interpreting usage data.

Table 9b: Wave 2 (n=20; all respondents provided, at least, usage information)

Species	Average volume per week (kg)	Form (%)		Origin (%)			Whole/ Filleted (%)	
		Fresh	Frozen	NT	Australia	Imported	Whole	Fillet/ prepared
Prawns	32	0%	100%	14%	32%	54%	13%	87%
Calamari	31	0%	100%	0%	33%	67%	36%	64%
Bugs	5	0%	100%	17%	67%	17%	71%	29%
Oysters	31 dozen	74%	26%	9%	91%	0%	23%	77%
Mud Crabs	4	80%	20%	60%	20%	20%	83%	17%
Other shellfish	7	0%	100%	13%	38%	63%	50%	50%
Barramundi	51	23%	77%	76%	16%	8%	5%	95%
Black Jewfish	8	20%	80%	88%	13%	0%	13%	88%
Goldband Snapper	27	14%	86%	71%	14%	14%	29%	71%
King Threadfin	16	14%	86%	86%	14%	0%	0%	100%
Atlantic Salmon	2	17%	83%	0%	100%	0%	0%	100%
Other fish	15							

Table 9c: Wave 3 (n=20; all respondents provided, at least, usage information)

Species	Average volume per week (kg)	Form (%)		Origin (%)				Whole/ Filleted (%)	
		Fresh	Frozen	NT	Australia	Imported	Combination	Whole	Fillet/ prepared
Prawns	26	2%	98%	13%	42%	45%	0%	32%	68%
Calamari	28	0%	100%	11%	21%	53%	11%	47%	53%
Bugs	14	0%	100%	33%	50%	0%	17%	67%	33%
Oysters	30 dozen	60%	40%	0%	81%	12%	8%	21%	79%
Mud Crabs	4	100%	0%	75%	25%	0%	0%	100%	0%
Other shellfish	7	0%	100%	22%	33%	44%	0%	18%	82%
Barramundi	44	12%	88%	85%	10%	0%	5%	5%	95%
Black Jewfish	8	17%	83%	78%	0%	11%	11%	11%	89%
Goldband Snapper	13	100%	0%	83%	17%	0%	0%	67%	33%
King Threadfin	7	1%	99%	67%	17%	0%	17%	0%	100%
Atlantic Salmon	2	25%	75%	0	67%	33%	0%	0%	100%
Other fish	17								

Table 9d: Wave 4 (n=20; all respondents provided, at least, volume usage information)

Species	Average volume per week (kg)	Form (%)		Origin (%)			Whole/ Filleted (%)	
		Fresh	Frozen	NT	Australia	Imported	Whole	Fillet/ prepared
Prawns	25	0%	100%	30%	25%	45%	19%	81%
Calamari	21	0%	100%	6%	25%	69%	11%	89%
Bugs	6	17%	83%	0%	67%	33%	50%	50%
Oysters	37 dozen	45%	55%	0%	80%	20%	19%	81%
Mud Crabs	<1	100%	0%	100%	0%	0%	100%	0%
Other shellfish	8	0%	100%	0%	80%	20%	0%	100%
Barramundi	42	17%	83%	77%	13%	10%	0%	100%
Black Jewfish	6	12%	88%	83%	17%	0%	0%	100%
Goldband Snapper	12	83%	17%	100%	0%	0%	42%	58%
King Threadfin	9	0%	100%	100%	0%	0%	0%	100%
Atlantic Salmon	4	5%	95%	0%	60%	40%	6%	94%
Other fish	11							

Table 9e: Wave 5 (n=20; all respondents provided, at least, volume usage information)

Species	Average volume per week (kg)	Form (%)		Origin (%)			Whole/ Filleted (%)	
		Fresh	Frozen	NT	Australia	Imported	Whole	Fillet/ prepared
Prawns	25	0%	100%	23%	33%	44%	15%	85%
Calamari	32	0%	100%	11%	13%	76%	21%	79%
Bugs	4	17%	83%	0%	100%	0%	83%	17%
Oysters	32 dozen	54%	46%	0%	79%	21%	8%	92%
Mud Crabs	2	75%	25%	75%	0%	25%	100%	0%
Other shellfish	11	0%	100%	0%	80%	20%	0%	100%
Barramundi	37	37%	63%	90%	8%	2%	6%	94%
Black Jewfish	7	50%	50%	100%	0%	0%	0%	100%
Goldband Snapper	8	100%	0%	80%	20%	0%	50%	50%
King Threadfin	11	38%	62%	100%	0%	0%	0%	100%
Atlantic Salmon	1	6%	94%	0%	88%	12%	6%	94%
Other fish	18							

Table 10: What proportion of your **current** menu items has seafood as the main ingredient?

	Wave 1		Wave 2		Wave 3		Wave 4		Wave 5	
	Number	%	Number	%	Number	%	Number	%	Number	%
20% or under	1	5%	4	20%	3	15%	3	15%	5	25%
21% - 30%	8	35%	2	10%	2	10%	3	15%	3	15%
31% - 40%	3	15%	5	25%	8	40%	6	30%	4	20%
41% - 50%	0	0%	2	10%	2	10%	3	15%	3	15%
More than 50%	4	30%	6	30%	3	15%	5	25%	5	25%
Not stated	4	20%	1	5%	2	10%	0	0%	0	0%
Total	20	100%	20	100%	20	100%	20	100%	20	100%
Mean	39%		46%		41%		43%		43%	

Table 11: Prior to the new labelling laws being introduced in November 2008, what proportion of your menu items had seafood as the main ingredient?

	Wave 1	
	Number	%
20% or under	1	5%
21% - 30%	7	35%
31% - 40%	1	5%
41% - 50%	1	5%
More than 50%	5	25%
Not stated	5	25%
Total	20	100%
Mean	43%	

Table 12: Has there been any change in seafood species used due to the labelling laws? If so, what species have changed?

	Verbatim
Between November 2008 and wave 1	Removed imported prawns from the menu and replaced with local Increased local fish in general NT Barra Only Bugs, Scallops, Oysters Foreign Fish Prawns, Crabs Calamari took off, then back again. Prawns Barramundi
Between wave 1 and 2	New menu from 1st August 2010 Added Prawn cocktail (imported), NT Baraa (local) as special Mackeral cutlets, bugs and local scallops Kingfish (farmed), local Spanish mackerel New species white bait- but not due to labelling Oysters/prawns local Local Barra (several variations) Threadfish salmon due to demand for loca
Between wave 2 and 3	Removed local Barra again do to lack of cheap local supply of 80 off special menu Mud Crab (?) Calamari (Nolonger imporeted?) Not on menu (permanent), Have introduced special board for seasonal product , Mud Crab etc. Less oversea seafoods
Between wave 3 and 4	No further changes recorded from any respondents
Between wave 4 and 5	A lot Getting rid of baby octopus cos no local available

Table 13: What seafood would you like to use more of? (unprompted, multiple-choice response)

	Wave 1		Wave 2		Wave 3		Wave 4		Wave 5	
	Frequency	%	Frequency	%	Frequency	%	Frequency	%	Frequency	%
Bugs	4	20%	2	10%	0	0%	0	0%	1	5%
Mud crab/crab	3	15%	4	20%	0	0%	2	10%	2	10%
Tuna	2	10%	0	0%	0	0%	0	0%	0	0%
Fresh, NT/local fish – general	6	30%	3	11%	3	15%	4	20%	2	10%
Prawn	2	10%	1	5%	2	10%	2	10%	2	10%
Squid	2	10%	0	0%	0	0%	0	0%	0	0%
Calamari	0	0%	2	10%	1	5%	0	0%	1	5%
Barramundi	0	0%	2	10%	3	15%	2	10%	3	15%
Other	6	30%	4	20%	6	30%	4	20%	7	35%
Not stated/No answer/Nil	6	30%	10	50%	8	40%	11	55%	8	40%
Total	20	100%	20	100%	20	100%	20	100%	20	100%

Table 14: If you were considering increasing your **IMPORTED** seafood on the menu, please indicate the importance of each attribute.

	Wave 1 Mean	Wave 2 Mean	Wave 3 Mean	Wave 4 Mean	Wave 5 Mean
Cost	4.4	4.2	4.3	4.5	4.9
Taste	4.6	N/A	N/A	4.8	4.8
Flexible portion packaging	3.1	3.3	3.7	3.8	4.1
Readily available year round	4.4	4.8	3.8	4.2	4.5
My supplier stocks it	3.2	3.9	3.8	4.3	4.8
Consumers demand	3.7	4.4	3.7	4.5	4.3
Consistent high quality	4.6	4.4	4.1	4.9	4.9
Consistent portion size	4.4	4.1	3.9	4.2	4.6
Profit margin	4.6	4.2	4.1	4.5	4.4
Stable pricing	4.3	4.5	3.8	4.5	4.6
Shelf-life	3.7	4.1	3.5	4.2	4.4
Menu variety	3.4	3.8	3.5	4.1	4.4

Table 15: If you were considering increasing your **LOCAL** seafood on the menu, please indicate the importance of each attribute.

	Wave 1 Mean	Wave 2 Mean	Wave 3 Mean	Wave 4 Mean	Wave 5 Mean
Cost	4.6	4.8	4.1	4.2	4.4
Taste	4.8	N/A	N/A	4.9	5
Flexible portion packaging	3.2	3.5	3.4	3.9	4.3
Readily available year round	4.5	4.8	4.2	4.6	4.4
My supplier stocks it	3.7	4.4	4.1	4.6	4.5
Consumers demand	4.1	4.4	4.1	4.8	4.9
Consistent high quality	4.8	4.5	4.5	4.9	5
Consistent portion size	4.1	3.6	3.7	4.1	4.2
Profit margin	4.1	4	4.1	4.3	4.3
Stable pricing	4.3	4	3.9	4.3	4.3
Shelf-life	3.3	4	4.2	4.3	4.3
Menu variety	3.7	4.1	4.1	4.5	4.4

Impact of labelling laws

Table 16: Who are your key suppliers? (unprompted, multiple-choice response)

	Wave 1		Wave 5	
	Frequency	%	Frequency	%
Supplier A	14	70%	15	75%
Supplier B	6	30%	11	55%
Supplier C	7	35%	8	40%
Supplier D	5	25%	3	15%
Supplier E	0	0%	1	5%
Supplier F	0	0%	1	5%
Supplier F	0	0%	1	5%
Supplier G	2	10%	0	0%
Supplier H	2	10%	0	0%
Others	10	50%	6	30%
Total	20	100%	20	100%

Table 17: How do you identify your seafood as "local" or "imported"? Please indicate the importance of each method.

	Wave 1		Wave 2		Wave 3		Wave 4		Wave 5	
	Use	Import-ance	Use	Import-ance	Use	Import-ance	Use	Import-ance	Use	Import-ance
	%	Mean	%	Mean	%	Mean	%	Mean	%	Mean
Printed menu explanation	90%	4.7	75%	5	85%	4.8	100%	4.6	100%	4.9
Specials board	50%	4.7	55%	4.6	45%	4.3	45%	4.2	50%	4.7
Seafood promotions	25%	4	30%	5	20%	3.5	15%	3.7	20%	4.5
Advertising/ media promotions	10%	4	10%	5	10%	3	15%	3.7	5%	5
Website	35%	4.5	15%	4.7	25%	3.2	45%	4	25%	4.6
Other	45%		5%		35%		45%		20%	

Table 18: Many businesses find an advantage in labelling all Australian seafood as "local", although it is not a requirement of labelling laws to do so. What proportion of your local product is labelled "local"?

	Wave 1		Wave 2		Wave 3		Wave 4		Wave 5		Mean	
	Frequency	%	Frequency	%	Frequency	%	Frequency	%	Frequency	%	Frequency	%
100%	8	40%	10	50%	12	60%	9	45%	11	55%	10	50%
50%	3	15%	3	15%	1	5%	8	40%	3	15%	4	18%
25%	3	15%	4	20%	2	10%	0	0%	4	20%	3	13%
None	5	25%	3	15%	4	20%	1	5%	2	10%	3	15%
Not stated	1	5%	0	0%	1	5%	2	10%	0	0%	1	4%
Total	20	100%	20	100%	20	100%	20	100%	20	100%	20	100%

Table 19: What species do you always label as local? (multiple-choice response)

	Wave 1		Wave 2		Wave 3		Wave 4		Wave 5	
	Frequency	%	Frequency	%	Frequency	%	Frequency	%	Frequency	%
Barramundi (NT)	13	87%	15	88%	11	69%	15	79%	17	94%
Salmon (TAS)	4	27%	1	6%	0	0%	4	21%	5	28%
Oysters (Coffin Bay)	5	33%	6	35%	4	25%	6	32%	7	39%
Prawns (NT)	2	13%	3	18%	1	6%	2	11%	6	33%
Prawns (Other)	0	0%	2	12%	4	25%	1	15%	5	28%
Tuna	0	0%	1	6%	0	0%	0	0%	0	0%
Scallops	2	13%	3	18%	1	6%	2	11%	1	5%
Other seafood	3	20%	6	35%	4	25%	5	26%	2	11%
Not stated	0	0%	2	12%	2	13%	3	16%	1	6%
Total outlets who label Australian seafood "local"	15	100%	17	100%	16	100%	19	100%	18	100%

Table 20: Thinking about the methods you use to advise country of origin, how much would this business have spent on implementing the labelling laws?

	Wave 1 Cost Nov 2008 to Apr 2010		Wave 2 Cost Apr to July 2010		Wave 3 Cost July to Oct 2010		Wave 4 Cost Oct 2010 to Jan 2011		Wave 5 Cost Jan to Apr 2011	
	Frequency	%	Frequency	%	Frequency	%	Frequency	%	Frequency	%
Nothing more	N/A	-	9	45%	9	45%	7	35%	14	70%
Up to $100	6	30%	2	10%	1	5%	6	30%	4	20%
$101 - $250	4	20%	3	15%	1	5%	3	15%	1	5%
$251 - $500	2	10%	2	10%	1	5%	2	10%	1	5%
More than $501	7	35%	5	25%	0	0%	1	5%	0	0%
Not stated	1	5%	1	5%	8	40%	1	5%	0	0%
Total	20	100%	20	100%	20	100%	20	100%	20	100%

Table 21: Why do you think the seafood labelling laws were introduced? (multiple-choice response)

	Wave 1		Wave 5	
	Frequency	%	Frequency	%
Consumer demand for more information on origin of seafood	12	60%	15	75%
Fishing industry demand	8	40%	10	50%
Consumer demand for fresher eating options	11	55%	12	60%
Trade Practices Act	6	30%	13	65%
Quality management trends	6	30%	11	55%
Government led initiative	5	25%	12	60%
Other	1	5%	2	10%
Total	20	100%	20	100%

Table 22: How were you advised that the seafood labelling laws were being introduced in the NT? (multi-response)

	Wave 1	
	Frequency	%
Letter of Advice from NT Fisheries	16	80%
NT Police Marine Enforcement visit	10	50%
Request to comment from Fisheries Research and Development Corporation	8	35%
Local Media Stories	4	20%
NT Seafood Council Website	3	15%
Support NT Caught Campaign	2	10%
Industry Membership Newsletters	2	10%
Other	2	10%
Total	20	100%

Table 23: How long did it take you to comply with the seafood labelling laws after the legislation was introduced?

	Wave 1	
	Frequency	%
Within 1 month	11	55%
1-3 months	7	35%
Have not yet fully complied	1	5%
Not stated	1	5%
Total	20	100%

Note: The venue who had not complied with the labelling laws in July 2010 reported they had fully complied by October 2010.

Table 24: Are there any species you have removed from your menu since November 2008 due to labelling laws?

	Wave 1	
	Frequency	%
Yes	7	35%
No	13	65%
Total	20	100%

Table 25: How difficult was it to research new menu options and purchase ingredients?

	Wave 1	
	Frequency	%
1. Very easy	2	29%
2. Easy	1	14%
3. Neither difficult or easy	2	29%
Not stated	2	29%
Total who removed species	20	100%

Table 26: What sources did you use to come up with new menu options? (multi-response)

	Wave 1	
	Frequency	%
Own recipes	2	29%
Suppliers	2	29%
Other	1	14%
Not stated	2	29%
Total who removed species	7	100%
Mean	2.0 (Easy)	

Table 27: To what extent do you think consumers understand the seafood labelling laws?

	Wave 1 Mean	Wave 2 Mean	Wave 3 Mean	Wave 4 Mean	Wave 5 Mean
NT residents	3.4	3.5	3.7	3.7	3.6
Visitors from interstate or overseas	2.9	3.1	3	3.3	3.1
Total overall understanding	3.1	3.3	3.3	3.5	3.4

Table 28: Do you have any further comments you would like to make about the seafood labelling laws?

	Verbatim
Wave 1	Supportive, Supplies have been competitive, chef support is crucial, enforce it. Local means reduce profit laws have not considered the economic and supply challenges but supportive. Incentive based systems. Legislation only encourages underhanded behaviour.
	Local so expensive and tend to try and off load poorer quality than goes down south
	Make imported Barra illegal if you are serious about growing NT branded produce.
	Its good that its protecting the local industry consumer is more aware, Australian fishing industry exepensive why isnt there a tax break for buying local?
	Would be more supportive of local prawns if more competitive, unhapy with policing and advising a heading rather than with each line item. If seafood I a combination of local and imported why should title imported.
	Aggree with it, need more exposure/ awareness of availibility with NT Foods
	Just complying! Agree with it, Barra and prawns (being sent away for processing)
	Agree with it. Local clientele at pub expecting local is a point of difference, so promote it
	Introduced beaurocratically letter + policy should have been more face to face consultation and should have been greater
	In a seafood restaurant they look to see whats imported assume local laws not clear
	Enforce it. More information on labellling
	Prawn costs make local too expensive. Feedback from consumers will drive the change
	Keep an eye on suppliers - they are not giving you the information.
	Labelling has reduced sales, when origin ambgious they purchase. Imported puts consumers off
	Monitoring restaurants, wait staffing are fibbing about origin of prawns local produce -
	Control price of local
	formalising imported has locked venues into not buying local
	Share initiative - should be australa wide not just NT regulate
Wave 2	Remains frustrated by lack of fresh fish and uncompetitive pricing. Isn't something available mid-range buying, consistency and availability
	Make customers understand why Barramamundi in south state of Australia is better quality and cheaper than NT
	Consumer driven has put local Barra back on menu when price is right.
	Menu presentations-offsite printing (up to 50)
	Imported- particularly for conferencing. Cost only, diner menu menu only 'local'
	Supportive. Consumer service and better venues as you can see beach
	Policing product consistency, local benefit- Darwin having a better reputation for food.
	Still haven't 'changed' menu.
	Have new menu and just put an 'I' at the end of the meal detail.
	Imported Ruling means menu boards are messy
	Supply boxes are for the most part not identifying origin, refresh policy
	Cant see the value in participating in survey. Have seen support NT Caught promotion identifying certain restaurants-not Noodle House, Government should fix the cost and supply of local seafood, penalise the big players don't target the small / medium restaurants.
Wave 3	Very dificult to source local barra at the moment
	Local barramundi a loss. No longer party in cost. Quality still inconsistance
	Expectation is for local but customers not prepared to pay more at this venue
	Local Labelleing a challenge one to varying supply year round
	Get a fish market
	Would rather imported scallops due to price but whould need to write imported on menu items such as share plate
	I understand them and agree with them
	Wholesale boxes stil failing to label origin. Jewfish supplier size V large to work willl. Scallops increased in price from $18 - $20.10
	It Hasn't really affected us, but I do think it's a good idea and that it should be implemented through out Australia
	More enforcement on labelling on Supplier Packaging
	Been told $20/kg for local barra from $17, this is not commercially viable for a 'club' menu
	Local Barra hard to get at the moment

	Verbatim
Wave 4	Reactive issue based on quality issue, barramundi supply + price are uncomprehensive.
	Please ensure wholesale packaging details origin in reference to pre-prepared seafood basket mix. BIDVEST online do this!! With current tourist climate, fresh produce is a huge risk due to shelf life.
	I think due to climate people need to be aware that 95% of NT seafood is frozen at sea.
	$14 - $16.50 kg threadfin salmon at this time, this season. Please clarify commercial $20 kg - $ 23.50 (wholesaler) barra age of 10 mths/ 3 mths /yellow salmon.
	Bring local last down improve supply and quality to local market.
	Definitely increased knowledge of consumer laws. Locals supplying readily crumbed fish is good, but not common.
	Limited local fish available at this time.
	Great idea, implement throughout Australia
	Menu adjustment due to profit margin. Increasing seafood menu to incorporate jelly fish restaurant menu style. Local barra special is high priced and sells out.
	Have changed to some local produce due to consumer trends, are finding issue with quality of local.
	Price ratio is still not comprehensive as the consumer complains. Six years maintained price.
Wave 5	It is vital for the industry either fishery or food industry througout labelling all products the correct way to protect the end consumer, good seafood product label provides complete and accurate information about the origin of the product and allows consumers and retailers to make an informed choice about buing local or imported products. Failure to do so will question the integrity of our industries and it can be quiet damaging for the fishery as for the tourism and local industry. In my opinion it is a very satisfying act of law to put in place to prevent any negative impacts in our food industry and we are able to gain the trust from the dn consumer to offer product information which helps to decide the choice of product is suitable for the consumer needs.
	Good Clear and easy to use
	Local Suppliers are not competitive, this is the frustration
	I think it should required to have country of origin on products but that should be as far as we go otherwise will cause too much hassle to re label menus each time suppliers change due to most product being unable to supply constantly for year round
	It's a good practice and it helps hospitality industries to understand the importance of the law, and for thecs to make a better decicion in imlementing ideas to clients needs
	Very important to stop 'black marketing'. You can advise customers properly on questions usually asked e.g fish names/where from (etc)
	This is an improvement we must have
	for NT Local more information of labelling is required
	Implement across australia enforce compliance
	It's a challenge getting our head office to think about local NT as they are brisbane based owner
	In april 2011, beachfront menu will remove baby octopus from seafood platter so that the labelling can remain local
	seafood platter
	hasn't changed consumption of import product

APPENDIX IX: Seafood Suppliers Survey Sheet

NORTHERN TERRITORY
Seafood Council
WORKING TODAY FOR A SUSTAINABLE TOMORROW

3 May 2011

Insert Name
Insert Business Name
Address Line 1
Address Line 2

Dear

As you are aware on 11 November 2008 new seafood labelling laws were introduced for imported seafood in the Northern Territory.

The impacts of this legislation on the wholesale sector is currently unknown. The Northern Territory Seafood Council is currently co-ordinating a research project to track the impacts of the legislation on seafood consumption at dining venues (i.e. pubs, restaurants and take away outlets) and on consumer preferences. Quarterly surveys have been undertaken to date with both the general public and 20 dining venues, the final round of surveys is due to be completed by April 2011.

The Project Steering Committee has identified the benefit of adding an additional survey which includes the wholesale sector to this research project. As such a select group of 10 wholesalers, of which you are one, are being asked to participate in the project.

We would like to request your participation in a face to face survey (see attached) to compliment the anecdotal evidence which has been collected by project consultant, Suzanne Morgan. A final report will be presented to the NT Government outlining the impacts on consumers, dining venues and wholesalers in June 2011.

The Northern Territory Seafood Council (NTSC) would also **like to confirm and assure you that your response will remain confidential.** All of the wholesale data collected will be represented as a collated result.

The scope of the project is as follows:

1. To quantify the quantity and origin of seafood sold in selected fish retailer establishments in the Darwin region;

2. To monitor the impact of fish retailer labelling requirements along the supply chain within the Darwin region; and

3. To identify any impacts of the labelling requirements on consumer choice.

Suzanne Morgan will be in contact with your shortly to arrange a suitable time to complete this once off survey, which is expected to take 15 minutes.

I do hope you take this opportunity to participate in providing feedback for your business sector on the seafood labelling laws.

Kind Regards

Katherine Sarneckis
Chief Executive Officer

ABN 85 918 271 276
Level 1, Darwin Shipstores Bldg, Fishermans Wharf, Darwin
GPO Box 618 Darwin NT 0801 | Telephone 08 8981 5194 | Facsimile 08 8981 5063 | Email ceo@ntsc.com.au

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NORTHERN TERRITORY
Seafood Council
WORKING TODAY FOR A SUSTAINABLE TOMORROW

IMPACT OF NT SEAFOOD LABELLING LAWS

WHOLESALE SECTOR SURVEY

1. **What proportion of your seafood inventory is imported? ____%**

2. **Prior to the new labelling laws being introduced in November 2008, what proportion of your seafood inventory was imported? ______%**

3. **Are there any species you have added or removed from your supplies since November 2008 due to labelling laws?**

____

____

Please complete the seafood usage survey to reflect on average the percentage use of the following species	**Origin (%)** NT	Local	Imported	Comments
Prawns				
Calamari				
Bugs				
Oysters				
Mud Crabs				
Mussels				
Other shellfish				
Barramundi				
Black Jewfish				
Goldband Snapper				
Saddletail Snapper				
King Threadfin				
Atlantic Salmon				
Coral Trout				
Tuna				
Basa				
Hoki				
Whiting				
Other fish				

APPENDIX X: Seafood Suppliers Survey Results

Species	Supplier 1 %	Supplier 2 %	Supplier 3 %	Supplier 4 %	Supplier 5 %
NT Prawn	0	99	100	0	0
Local Prawn	95	1	0	10	50
Imported Prawn	5	0	0	90	50
NT Calamari	0	0	100	0	10
Local Calamari	25	0	0	10	0
Imported Calamari	75	0	0	90	90
NT Bugs	0	0	100	0	0
Local Bugs	90	0	0	10	100
Imported Bugs	10	0	0	90	0
NT Oyster	0	0	0	0	0
Local Oyster	96	0	100	10	100
Imported Oyster	1	0	0	90	0
NT Mud Crab	90	99	100	0	100
Local Mud Crab	10	1	0	0	0
Imported Mud Crab	0	0	0	0	0
NT Mussels	0	0	0	0	0
Local Mussels	0	0	100	10	0
Imported Mussels	0	0	0	90	100
NT Shellfish	0	0	50	0	0
Local Shellfish	0	0	50	0	0
Imported Shellfish	0	0	0	100	100
NT Barramundi	?	100	100	10	100
Local Barramundi	?	0	0	0	0
Imported Barramundi	?	0	0	90	0
NT Black Jewfish	100	100	100	0	100
Local Black Jewfish	0	0	0	0	0
Imported Black Jewfish	0	0	0	0	0
NT Goldband Snapper	100	100	100	10	30
Local Goldband Snapper	0	0	0	0	70
Imported Goldband Snapper	0	0	0	90	0
NT Saddletail Snapper	100	100	100	0	30
Local Saddletail Snapper	0	0	0	0	70
Imported Saddletail Snapper	0	0	0	100	0
NT King Threadfin	100	99	100	0	100
Local King Threadfin	0	0	0	0	0
Imported King Threadfin	0	0	0	0	0
NT Atlantic Salmon	0	0	0	0	0
Local Atlantic Salmon	100	0	100	0	100
Imported Atlantic Salmon	0	0	0	100	0
NT Coral Trout	100	0	100	0	0
Local Coral Trout	0	0	0	0	100
Imported Coral Trout	0	0	0	0	0
NT Tuna	100	100	0	0	0
Local Tuna	0	0	100	0	0
Imported Tuna	0	0	0	100	0
NT Basa	0	0	0	0	0
Local Basa	0	0	0	0	0
Imported Basa	0	0	0	100	0
NT Hoki	0	0	0	0	0
Local Hoki	100	0	0	0	0
Imported Hoki	0	0	0	100	0
NT Whiting	0	0	0	0	0
Local Whiting	0	0	100	10	0
Imported Whiting	0	0	0	90	0

APPENDIX XI: Fridge Magnet

APPENDIX XII: CDU Survey

CHARLES DARWIN UNIVERSITY – COMMERCIAL COOKERY FOOD SERVICE SECTOR SURVEY – STUDENT VERSION

On 11 November 2008 new labelling laws were introduced, requiring seafood to be labelled "imported" when Australian product has not been used. A core research project is currently underway to track the impacts on seafood consumption at dining venues arising from these new laws. Five waves of research are being conducted via face to face surveys, on a quarterly basis with consumers and participating businesses from the food service sector. Individual information provided will be treated confidentially with only aggregations of answers and/or summaries of comments put into the public domain.

The additional information that the CDU Students collect through this project, will compliment the anecdotal evidence the project officer is collecting on behalf of the Department of Resources. Individual responses will be kept confidential by the Northern Territory Seafood Council (NTSC).

The scope of the project is as follows:

1. To quantify the quantity and origin of seafood sold in selected fish retailer establishments in the Darwin region;
2. To monitor the impact of fish retailer labelling requirements along the supply chain within the Darwin region; and
3. To identify any impacts of the labelling requirements on consumer choice.

i. Survey Date: ____________________ ii. Student Name: ______________

iii. Restaurant Name: ________________

DEMOGRAPHICS

1. What characteristics best describe this business?

Location: 1 Darwin CBD 2 Darwin Suburbs

Menu Style: 1 Australian 2 European 3 Asian 99 Other:______

Dining Style: 1 Restaurant 2 Club/ Pub 3 Takeaway 99 Other:______

2. Who controls the menu in this business?

1 Head chef 2 Food/ beverage manager 3 Venue owner 99 Other:_______

3. Who controls the purchase of seafood in this business?

1 Head chef 2 Food/ beverage manager 3 Venue owner 99 Other:_______

4. On average, how many times per year do you change the menu?

1 Once or twice per month 2 Four times per year 3 Once or twice per year 4 Don't change

5. Do you offer fish or seafood specials on the menu?

1 Always 2 Mostly 3 Sometimes 4 Never

6. Why do you have seafood specials on the menu?

1 Trial new idea before putting on menu
2 Innovation
3 Chefs don't get bored
4 Customers don't get bored
5 Seasonal product
6 Customer demand
99 Other:____________________

7. How many covers(meals) would you serve per week at this time of year?

1 70-150 2 151-250 3 251-350 4 351-450
5 451-999 6 1,000-1,500 7 More than 1,500

8. What proportion of your current menu items has seafood as the main ingredient?_____%

SEAFOOD USAGE

9. Please crosscheck with the current menu or Executive Kitchen Staff and fill in the following table
[Check each attribute adds to 100%]

Species	Included on current menu (yes/no)	Origin (%)				
		NT	Australia	Imported	Combination	Not sure
Example Prawns	***Yes***			***100***		
Prawns						
Calamari						
Oysters						
Mud Crabs						
Mussels						
Other shellfish						
Barramundi						
Black Jewfish						
Goldband Snapper						
Saddletail Snapper						
King Threadfin						
Atlantic						

Species	Included on current menu (yes/no)	Origin (%)				
		NT	Australia	Imported	Combination	Not sure
Salmon						
Basa						
Hoki						
Other fish						

IMPACT OF LABELLING LAWS

10. How does your workplace identify the country of origin of seafood you serve to consumers? Please indicate the importance of each method.

			Very unimportant →				Very important
Printed menu explanation	1 Yes	2 No	1	2	3	4	5
Specials board	1 Yes	2 No	1	2	3	4	5
Seafood promotions	1 Yes	2 No	1	2	3	4	5
Advertising/ media promotions	1 Yes	2 No	1	2	3	4	5
Website	1 Yes	2 No	1	2	3	4	5
Information for Service Staff:__________	1 Yes	2 No	1	2	3	4	5

11. Many businesses find an advantage in labelling all Australian seafood as "local", although it is not a requirement of labelling laws to do so. What proportion of local product used in your workplace is labelled "local"?

1 100%   2 50%   3 25%   4 None

12. What species at your workplace are always labelled as local? [TICK ALL THAT APPLY]

1 Barramundi (NT)   2 Salmon (TAS)   3 Oysters (Coffin Bay)   4 Prawns (NT)
5 Prawns (Other)   6 Tuna   99 Other: ________________

13. How was your workplace advised that the origin of labelling laws were being introduced in the NT?

1 Letter of Advice from NT Fisheries
2 Request to comment from Fisheries Research and Development Corporation
3 Fisheries Research and Development Corporation Fact Sheet
4 NT Seafood Council Website
5 Support NT Caught Campaign
6 Industry Membership Newsletters
7 NT Police Marine Enforcement visit
8 Local Media Stories
99 Other: ____________

14. Is the person who controls the menu at your work place aware there is a Penalty: up to a $20,000 under the *Fisheries Act* for non compliance with seafood labelling requirements?

1 Yes: 2 No

15. To what extent do you think consumers understand the country of origin labelling laws?

(Please select the number which corresponds with the level to which you agree)	Do not understand very well	→			Understand very well
NT residents	1	2	3	4	5
Visitors from interstate or overseas	1	2	3	4	5

16. Do you have any further comments you would like to make about the country of origin labelling laws?

NORTHERN TERRITORY
Seafood Council
WORKING TODAY FOR A SUSTAINABLE TOMORROW

12 October 2010

MEDIA RELEASE

Consumers have say on seafood labelling

Consumers are being surveyed today in Darwin to better understand what the impacts of the NT's seafood labelling laws have on their choices when dining out.

"This legislation is a first for Australia and we are working with both the consumers and restaurants to understand exactly what the impacts of this legislation are," said Northern Territory Seafood Council Chairman, Mr Rob Fish.

"Interviewing consumers we are gaining a better understanding of the impact of country of origin labelling has on their choice of seafood," Mr Fish said.

"Results to date are showing that the labelling laws are helping people make informed choices.

"It is very reassuring for the seafood industry that people are choosing local seafood over imported when given the choice!" Mr Fish went on to say.

"Diners in the Northern Territory wanting to try our seafood need to make sure they are buying the real thing and labelling laws help make sure they don't have an imitation Territory experience.

"Territory, menus must comply with the legislation by clearly stating when imported seafood is used."

The project which began in April 2010 has is undertaken a series of consumer surveys over the peak and non-peak tourism season. Two more surveys are to occur early next year before all the results of the surveys will be collated for reporting to the NT Government and other stakeholders who are supportive of rolling out seafood labelling nationally.

Tactical Research Fund: tracking the impacts on seafood consumption at dining venues arising from the Northern Territory's seafood labelling laws is supported by funding from the FRDC on behalf of the Australian Government.

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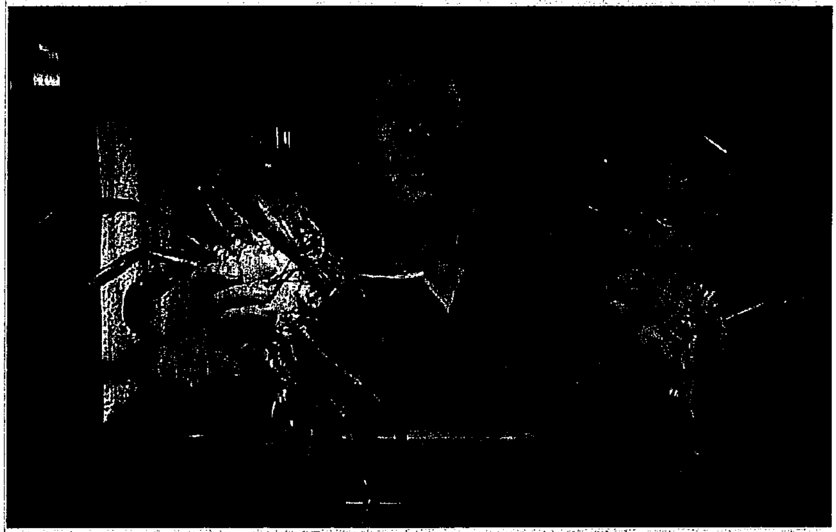

Danny Yuen, owner of Tasty House restaurant displays locally caught mud crabs he offers diners Picture: REGI VARGHESE

Our seafood heaven

THE Seafood Council is carrying out a consumer survey about the Northern Territory's place-of-origin labelling system.

Twenty Darwin businesses will also be asked about the effectiveness of the laws.

Primary Industry Minister Kon Vatskalis said earlier surveys showed labelling laws were helping consumers make "informed decisions" on buying seafood.

"People are choosing local over imported when given the choice," he said.

The Territory led Australia when it introduced the country-of-origin labelling as a condition of licences to sell seafood in 2008.

"Some of the best seafood in the world comes from Territory waters, so why wouldn't you buy local?" Mr Vatskalis said.

"Our seafood comes from pristine waters and our fisheries are some of the best managed in Australia."

> "Some of the best seafood in the world comes from Territory waters

The Territory seafood industry says that imported fish are often bred in unhygienic conditions.

A Territorian who visited fish farms in Indonesia and Thailand recently was shocked at the conditions.

"They were filthy — and stank to high heaven," he said. "I don't know how the fish survived to be exported.

"I swore there and then never to eat imported fish again. Aussie fish may be more expensive but at least you know it's top quality and clean."

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Fisheries Research and Development Corporation

Northern Territory Government

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