



Fisheries Research & Development Corporation (FRDC) Stakeholder Engagement Research

Exhibit Catalogue

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Acknowledgements

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first some background...

Fisheries Research and Development Corporation (FRDC) plans, invests in and manages fisheries research and development throughout Australia. It is a statutory authority within the portfolio of the Federal Minister for Agriculture, Fisheries and Forestry and is jointly funded by the Australian Government and the fishing industry.

FRDC has a number of key industry stakeholders – that is commercial enterprises who provide the industry contribution that funds FRDC and the R&D undertaken on behalf of the industry. These stakeholders are largely commercial fishers, running day to day businesses involved in the fishing industry across Australia.

It is important then that FRDC regularly measures the success of its engagement with these important stakeholders.

about the study

With this as context, FRDC commissioned research among its stakeholders. The aim of the research was to better understand stakeholder:

- Awareness of FRDC and what they do;
- Experiences and contact with FRDC; and
- Their behavior around marketing and thoughts on a national seafood marketing plan.

The stakeholder survey now represents the fourth such undertaking by FRDC, with the previous three being conducted in 2007, 2009 and 2011.

The research involved a 30 minute computer assisted telephone interview (CATI). The list of respondents to the survey was provided by FRDC, which sourced the contact names from key industry associations and bodies. A range of Likert rating scale, closed and open-ended questions were used throughout the survey.

In total 274 interviews were completed over the period. Quotas were set on business size, defined as:

- Large businesses n=72. For the purposes of the study this was defined as the top 300 business.
- Smaller businesses n=202. This included all business not within the top 300 business.

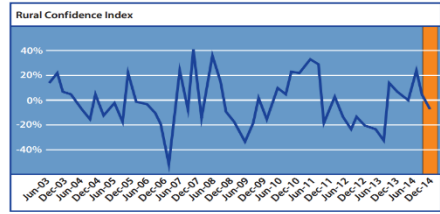
The research was conducted over the period 1st of December 2014 – 2nd of February 2015.

The key findings from the research follow.

stakeholder sentiment

Across all agriculture a similarly pessimistic outlook. . . .

The Rabobank rural confidence index (measured across all agriculture sectors) fell sharply in the last quarter with more farmers expecting conditions to worsen than improve. This fall comes despite generally positive seasonal conditions and commodity price outlooks. It was reported that global economic uncertainty and concerns about public policy issues were major contributors to this increased pessimism.



Percentage expecting the agricultural economy to improve minus percentage expecting conditions to worsen over the next 12 months.

Source: Rabobank Rural Confidence survey, December 2014

Their feelings on the future of the fishing industry over the next 12 months



2011	Negative 36%	Neither 21%	Positive 43%
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Positive	58%
Negative	20%
Sentiment Index	+38%

Base: All stakeholders; n = 274

Their feelings on the future of their business over the next 12 months

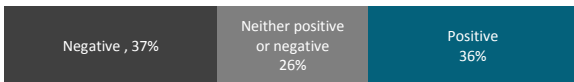


2011	Negative 36%	Neither 21%	Positive 43%
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Positive	69%
Negative	18%
Sentiment Index	+51%

Base: All stakeholders; n = 274

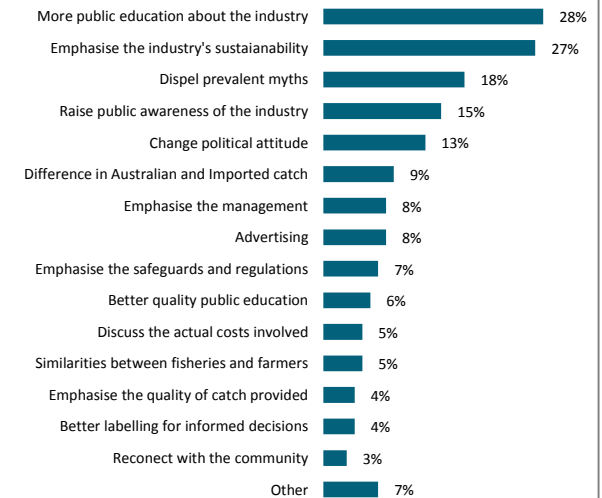
Their description of the public's perception of the fishing industry



Base: All stakeholders; n = 274

2011 - n/a

What can be done to improve public perception

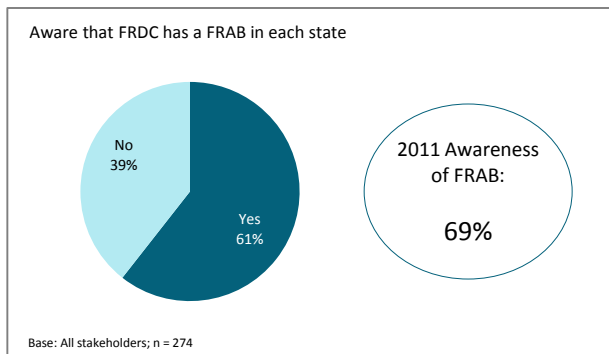
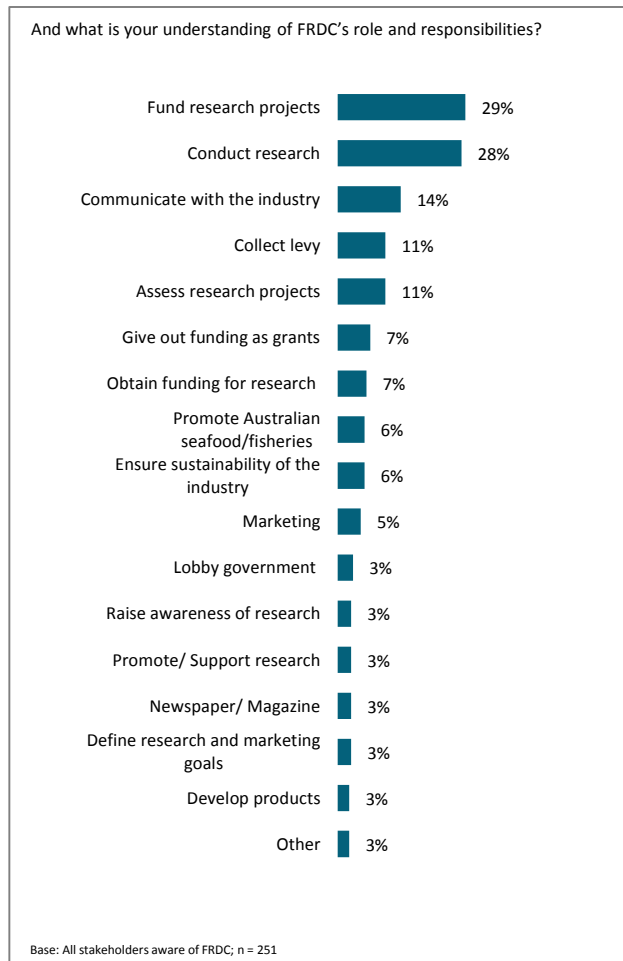
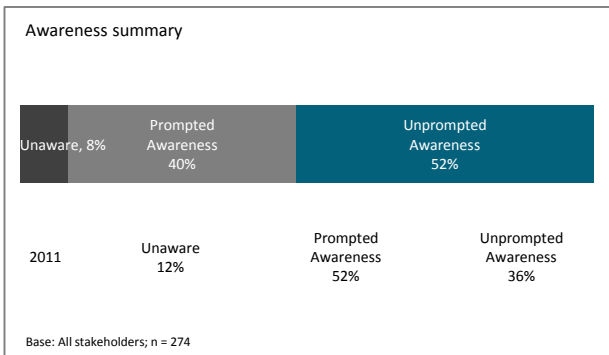
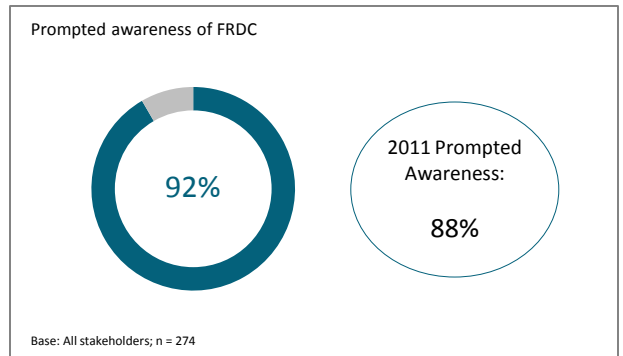
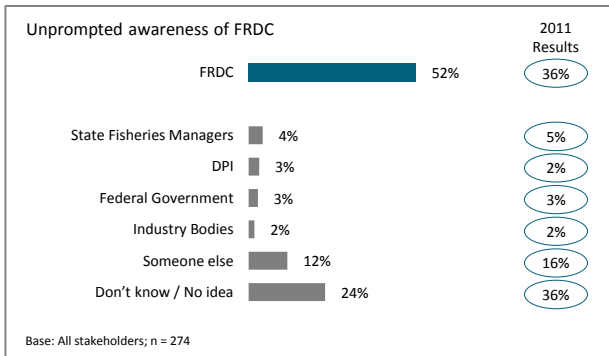


Base: Those who believe the public have a negative view of the industry and provided a response; n = 109
Only response above 2% are shown

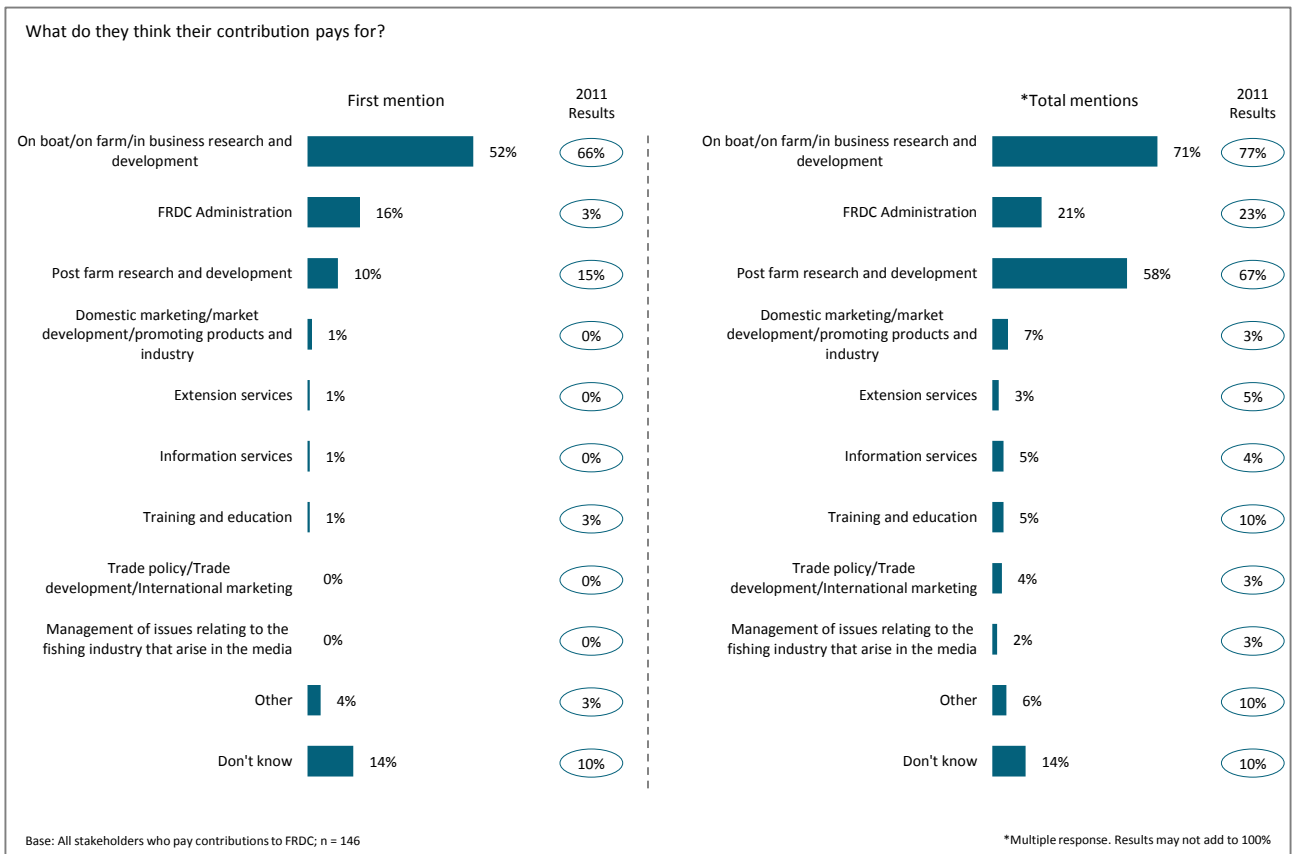
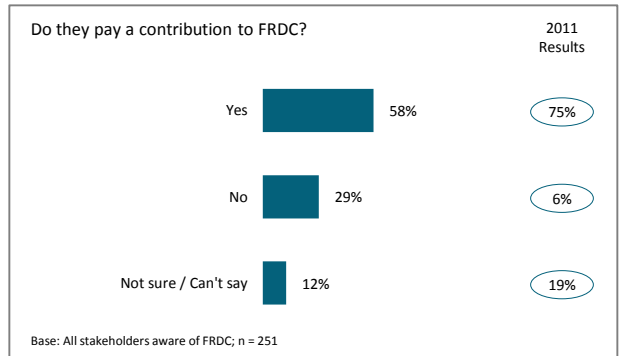
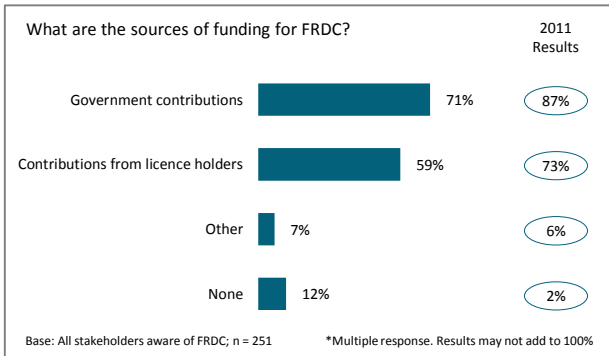
What we asked:

- How would you describe your feeling about the future of the fishing industry over the next 12 months? Would you say you are...
- How would you describe your feeling about the future of your business over the next 12 months?
- How would you describe the public's perception of the fishing industry?
- What do you think should be done about improving the public's perception?

awareness of FRDC and contributions



What we asked:
 Which organisation is responsible for managing and investing in National Research and Development across the Australian fishing industry?
 Before today had you heard of Fisheries Research and Development Corporation or FRDC?
 And what is your understanding of FRDC's role and responsibilities?
 Are you aware that FRDC has a Fisheries Research Advisory Board (FRAB) in each state with representation from the fishing industry sectors to help plan and assess research applications?



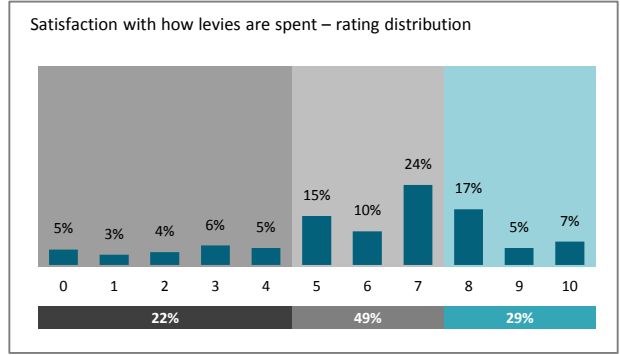
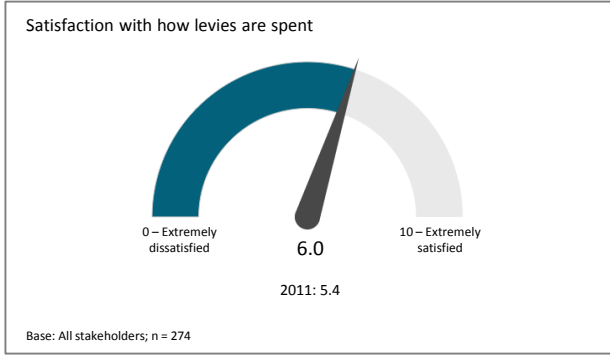
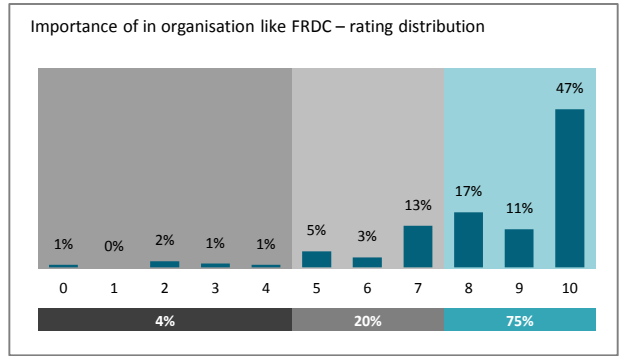
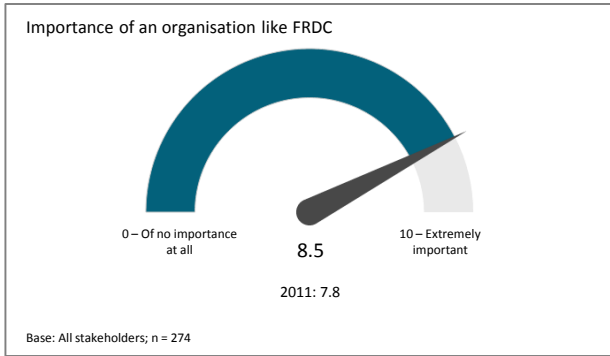
What we asked:

Do you pay a contribution to FRDC to manage and invest in research & development on behalf of the fishing industry?

To the best of your knowledge what are the sources of funding for FRDC?

To the best of your knowledge what does your contribution pay for?

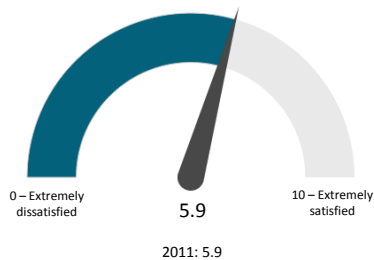
overall importance of and satisfaction with FRDC



What we asked:
 How important is it for the Australian fishing industry to have an organisation like FRDC?
 Taking into account all of the things that we have discussed so far, overall how satisfied are you that your contributions are being invested wisely and for the benefit of stakeholders?

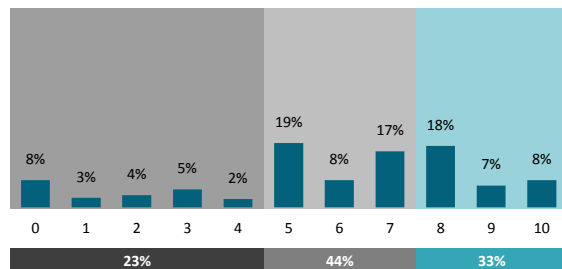
feel they have a say in where levies are invested

Satisfaction with opportunity to have a say where levies are invested



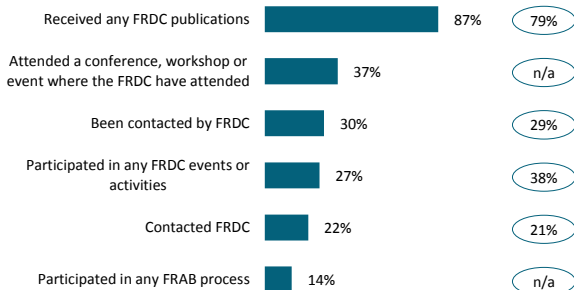
Base: All stakeholders aware of FRDC; n = 251

Satisfaction with opportunity to have a say where levies are invested – rating distribution



*Have you done any of the following...

2011 Results

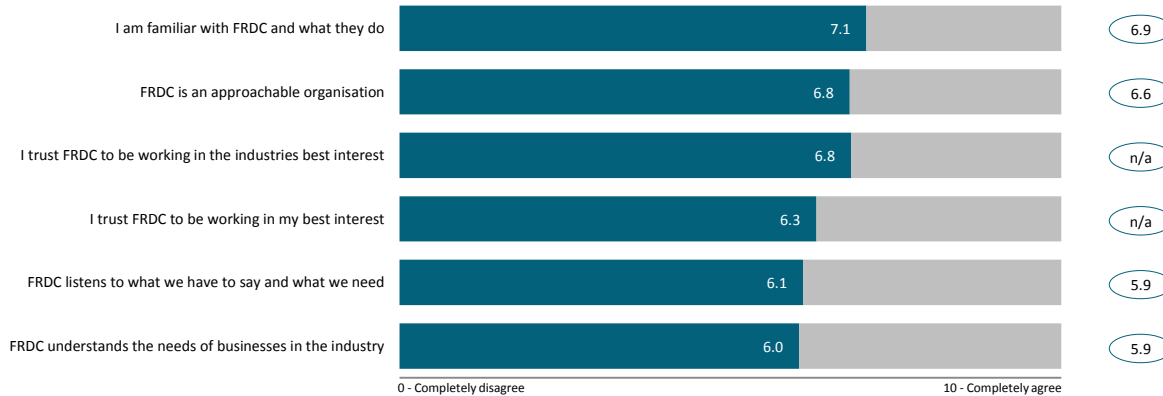


Base: All stakeholders aware of FRDC; n = 251

*Multiple response. Results may not add to 100%

Agree that...

2011 Results



Base: All stakeholders aware of FRDC; n = 251

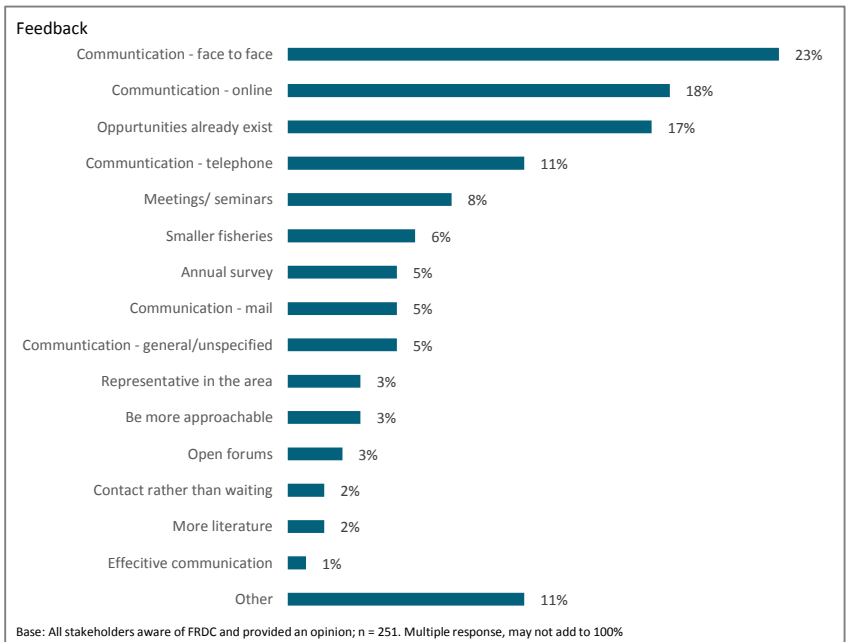
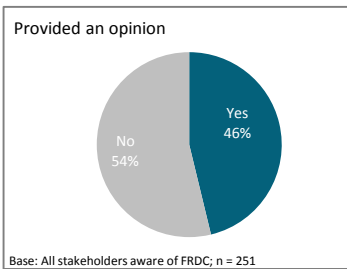
What we asked:

And overall how satisfied are you that people like yourself or your industry representative bodies are given an adequate opportunity to have a say in the way in which your contributions are invested?

In the last 12 months have you...

I'd now like you to think about your relationship with FRDC. I will read out a list of statements and I want you to tell me how strongly you agree with each one using a scale of 0 – 10 where 10 is completely agree and 0 is completely disagree.

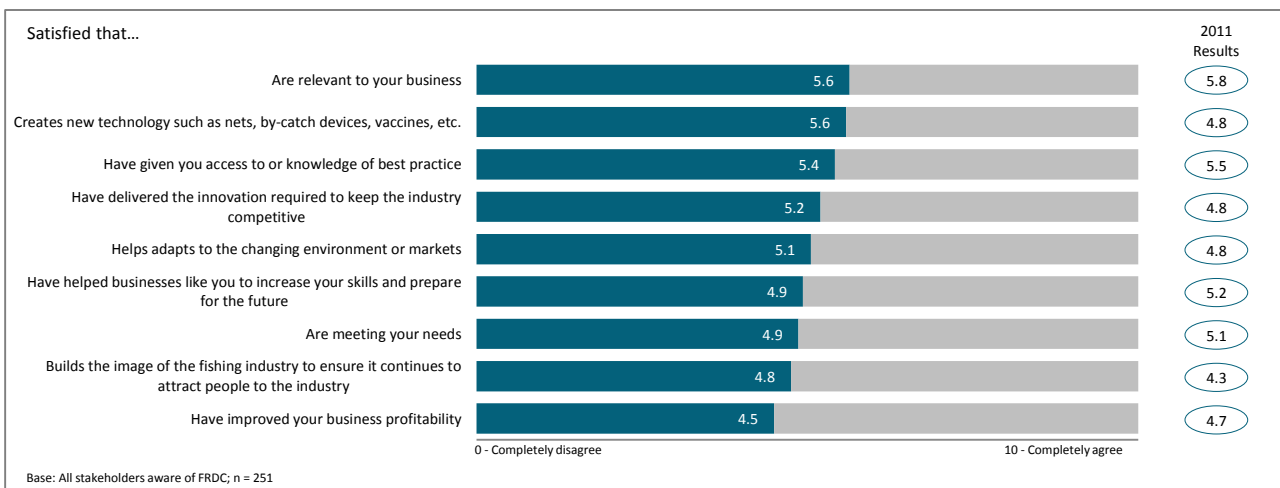
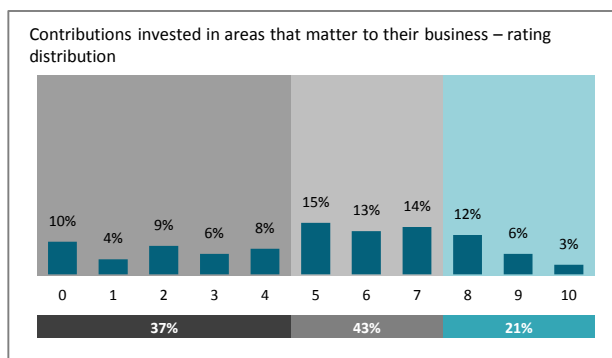
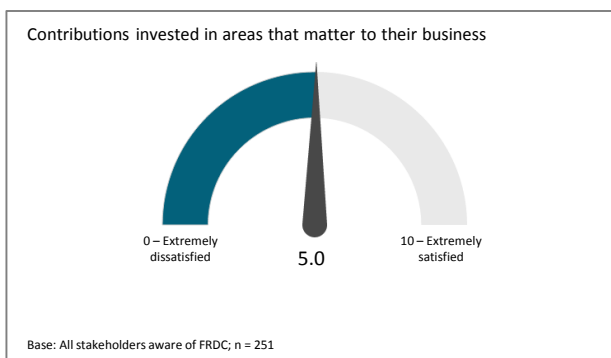
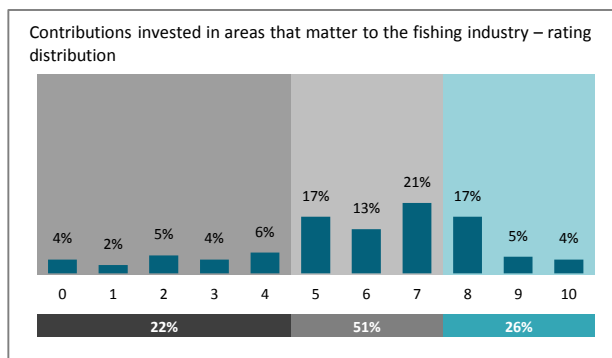
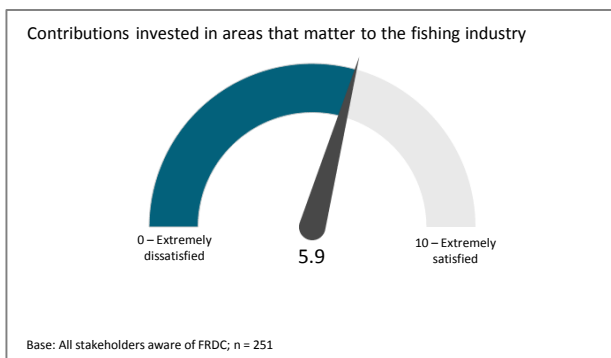
other things FRDC could do to provide people like you the opportunity to provide feedback and input to FRDC



What we asked:
Are there other things FRDC could do to provide people like you the opportunity to provide feedback and input to FRDC?

satisfaction with what FRDC invest in

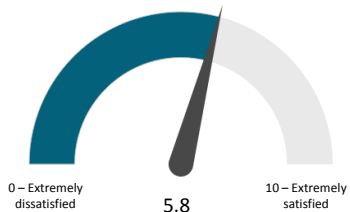
contributions are being invested in areas that are important and matter to...



What we asked:
 Now, taking into account your satisfaction with the programs FRDC invests in overall how satisfied are you that your contributions are being invested in areas that are important and matter to... ?
 I'd now like to know how satisfied you are with the R&D programs and projects that FRDC invests in. How satisfied are you that FRDC invests in areas that...

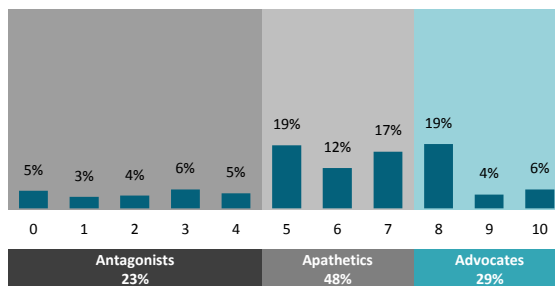
how FRDC engage with industry

Satisfaction with how FRDC engage with industry

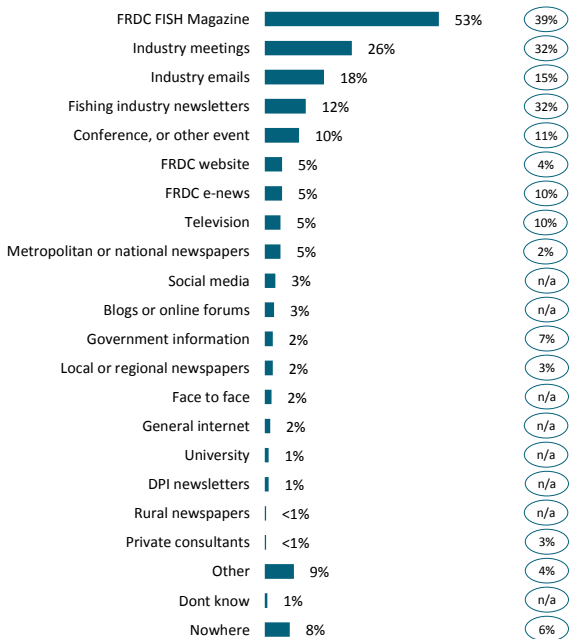


Base: All stakeholders; n = 274

Satisfaction with how FRDC engage with industry – rating distribution



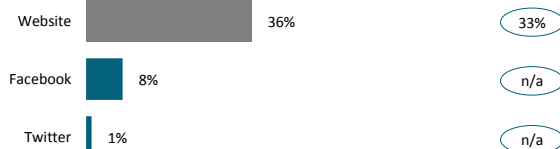
*Where have they seen or heard anything about FRDC?



Base: All stakeholders aware of FRDC; n = 251

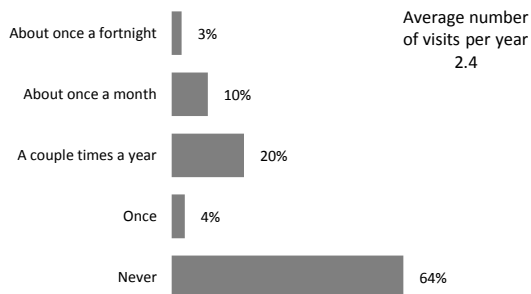
*Multiple response. Results may not add to 100%

Visited FRDC's sites for information in the past 12 months?



Base: All stakeholders aware of FRDC; n = 251

Breakdown of website visits per year



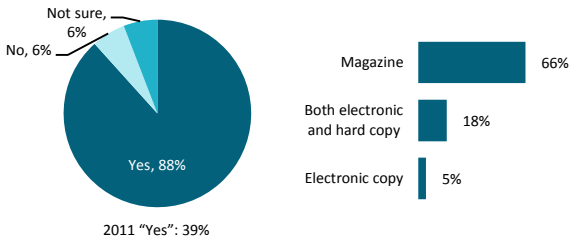
Base: All stakeholders aware of FRDC; n = 251

What we asked:

Thinking about all these areas that we have discussed, overall, how satisfied are you with the way in which FRDC engages with businesses like yours?
 There are many places where you may hear or see information about FRDC. In the last 12 months, where have you seen or heard anything about FRDC?
 In the past 12 months how often have you visited the following for information?

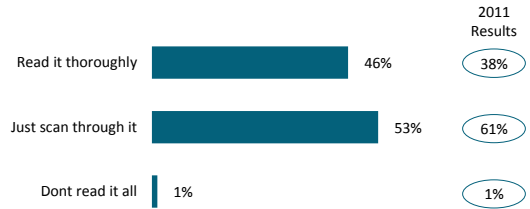
FRDC FISH Magazine

Do they receive the FISH magazine? If so, in what format?



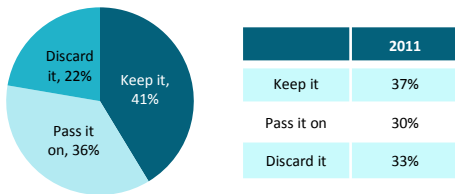
Base: All stakeholders; n = 274

What they usually do when they receive the FISH magazine



Base: All stakeholders who receive the FISH magazine; n = 242

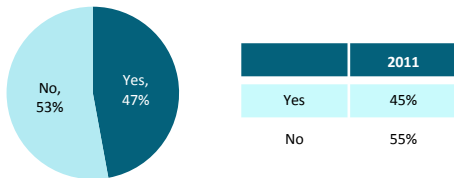
What did they do with the FISH magazine after they finished reading it?



Base: All stakeholders who receive the FISH magazine; n = 242

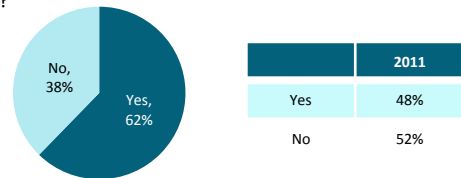


Did they follow up on info or stories they have seen in the FISH magazine to find out more details?



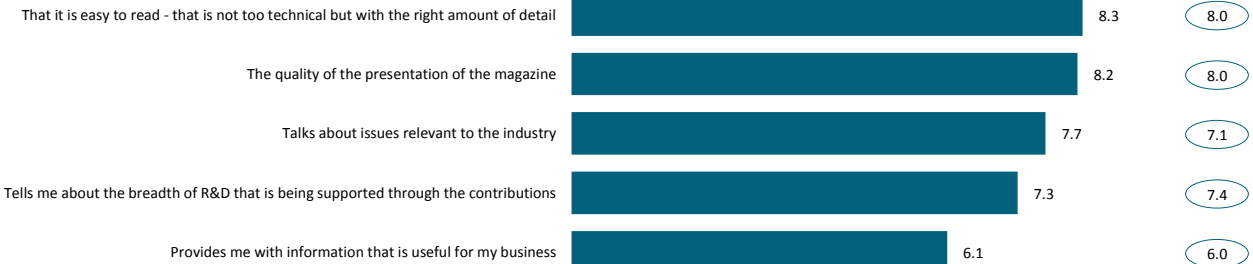
Base: All stakeholders who receive the FISH magazine; n = 242

Did they learn something new for their business, or introduce new systems, technologies or approaches to the way they do business?



Base: All stakeholders who followed up on information read in the FISH magazine; n = 114

Satisfaction with...

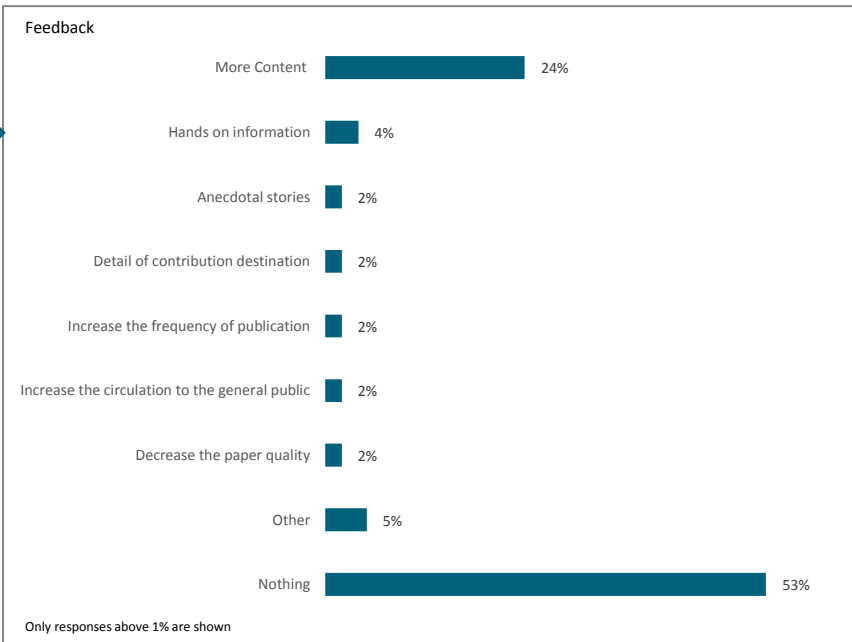
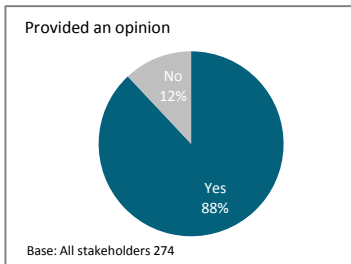


Base: All stakeholders who receive the FISH magazine; n = 242

What we asked:

FRDC produces the quarterly FISH magazine. Do you receive the FISH magazine?
 Do you keep your copy of FISH, pass it on to other work colleagues or people in the industry or discard it once you read it?
 Which of the following best describes what you usually do when you receive the FISH magazine? Would you say you ...
 Using a scale of 0 to 10, where 0 = poor and 10 = excellent, how would you rate the FISH magazine in terms of ...

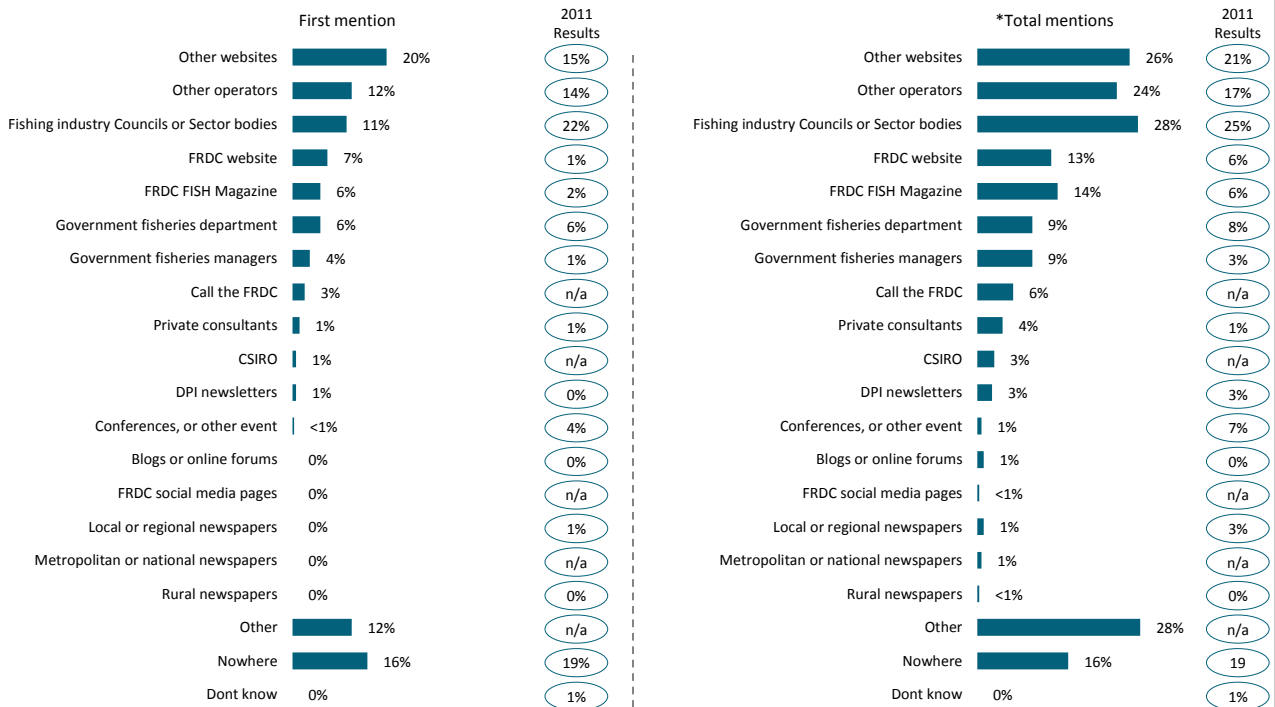
one thing you would change about FISH



What we asked:
If you could change one thing about the FRDC FISH magazine, what would it be?

stakeholders channels for information sourcing

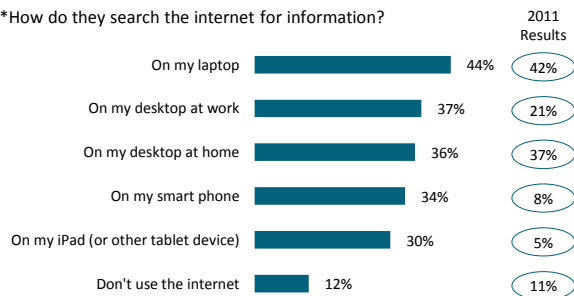
Where do you normally go to find out information on research or to improve your business?



Base: All stakeholders; n = 274

*Multiple response. Results may not add to 100%

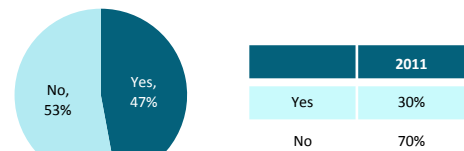
*How do they search the internet for information?



Base: All stakeholders; n = 274

*Multiple response. Results may not add to 100%

In the last 12 months, have they used any information or findings from research to make changes in their fishing business?

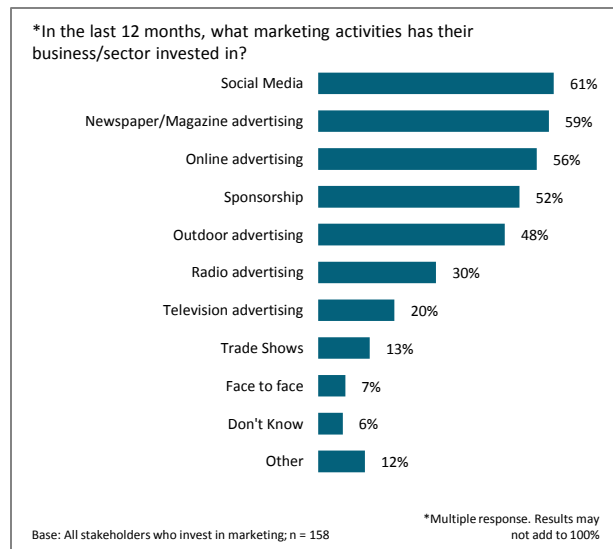
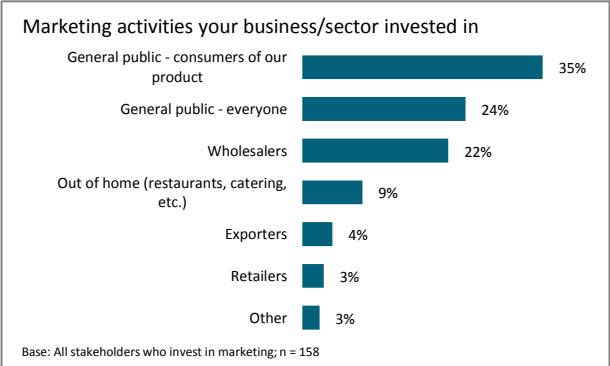
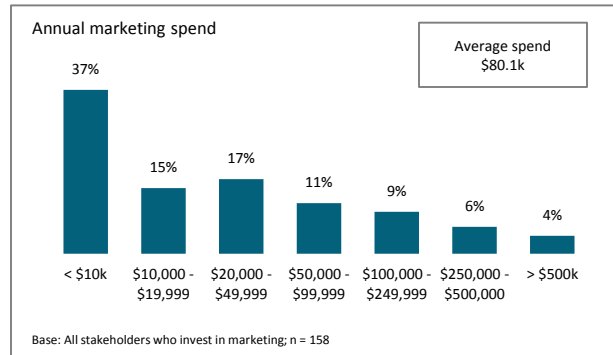
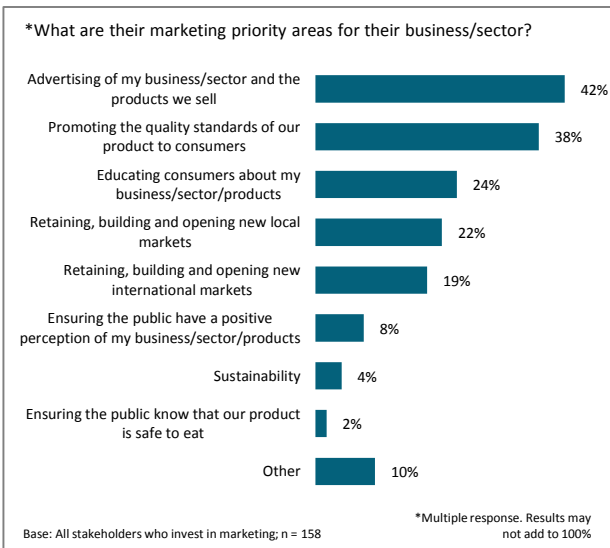
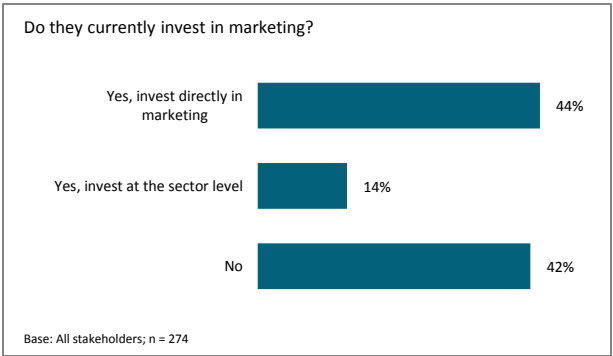
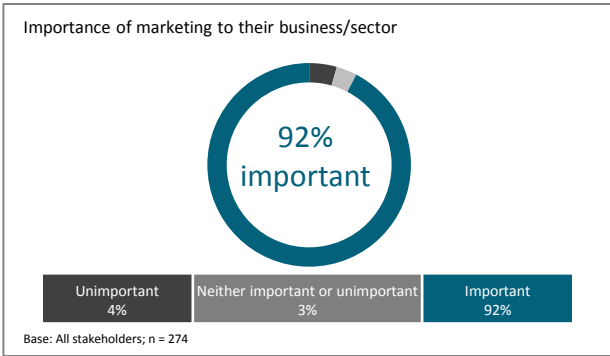


Base: All stakeholders; n = 274

What we asked:

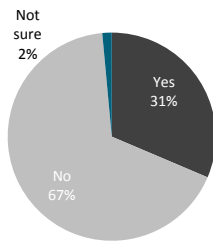
Where do you normally go to find out information on research or to improve your business?
 How do you usually search the internet for information? Do you usually do this on your computer, laptop, tablet or on your smart phone? Please select as many as apply.
 In the last 12 months have you used any information or findings from research to make changes in your fishing business?

marketing and FRDC



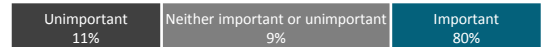
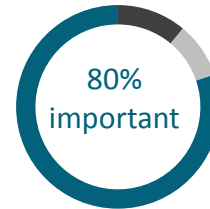
What we asked:
 How important is marketing to your business/sector?
 Does your company currently invest in any marketing?
 As a guide only, which of the following categories best reflects your level of commitment to marketing? (annual spend)
 What are the marketing priority areas for your business/sector?
 Over the past twelve months, what marketing activities has your business/sector invested in?
 Who does your marketing specifically target?

Aware of the Marketing Function Advisory Committee



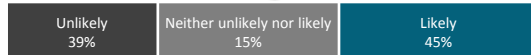
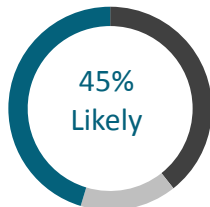
Base: All stakeholders; n = 274

Importance of national seafood marketing plan



Base: All stakeholders; n = 274

Likelihood to contribute to a national seafood marketing plan



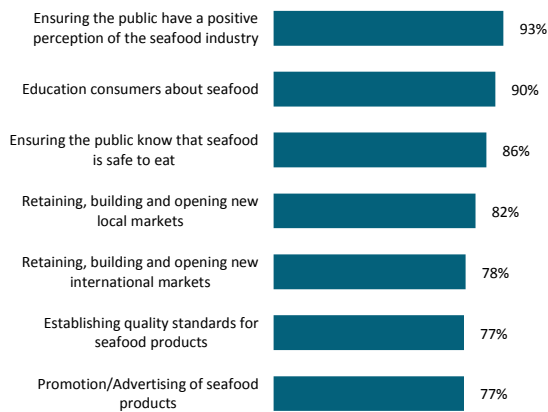
Base: All stakeholders; n = 274

Belief that the seafood industry could deliver a national seafood marketing plan



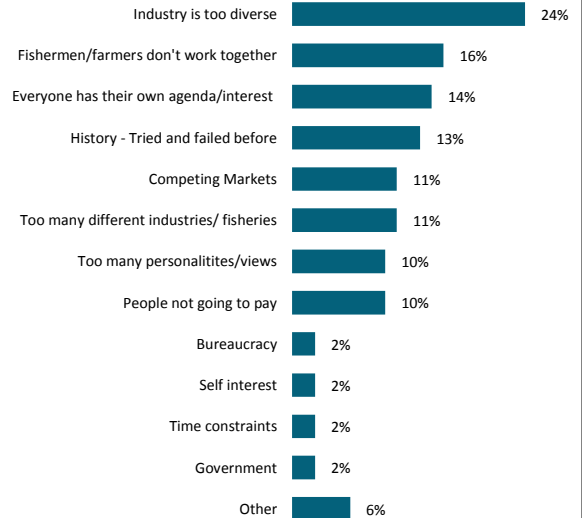
Base: All stakeholders; n = 274

Areas that should be invested in under a national seafood marketing plan



Base: All stakeholders; n = 274

No – Why do you think that?

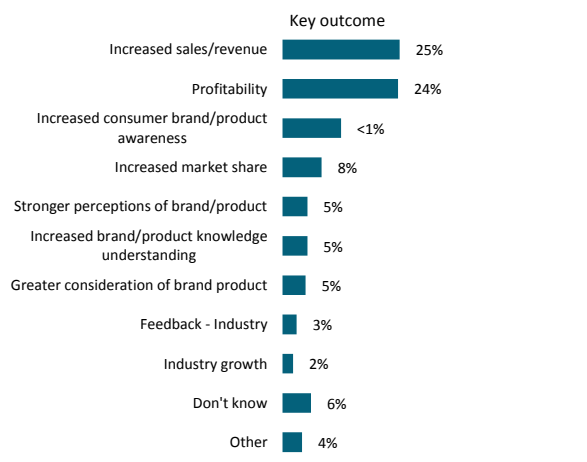


Base: Stakeholders who answered "no" to previous question. n= 96.
Note: only results above 1% are shown.

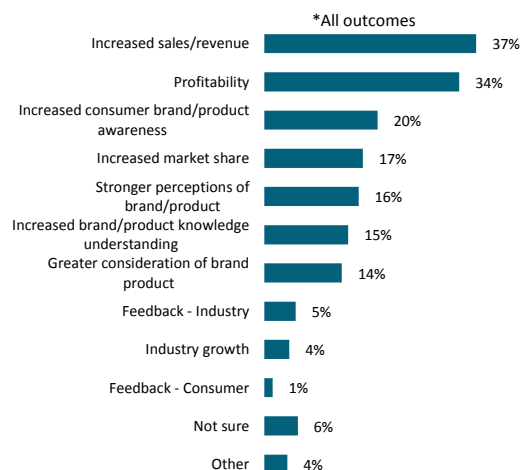
What we asked:

Before today, were you aware of the Marketing Function Advisory Committee?
 In your opinion, how important is it to have a national seafood marketing plan?
 How likely would your business be to consider making a financial contribution to a national seafood marketing plan?
 Do you believe that the seafood industry as a whole can work together to develop and then deliver a national seafood marketing plan?
 Why do you think that? What will be the obstacles preventing this to occur? What would you suggest could be done to overcome these challenges?
 Which of the following areas do you believe should be invested in under a national seafood marketing plan?

How success of the National Seafood Marketing Plan should be measured

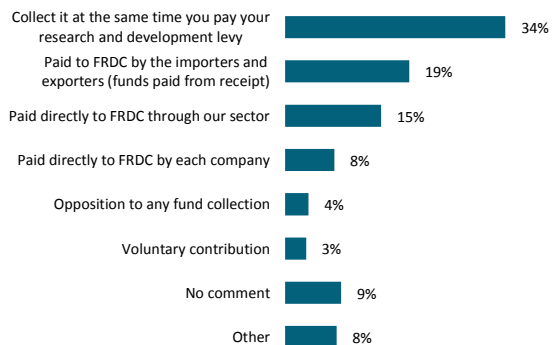


Base: All stakeholders; n = 274



*Multiple response. Results may not add to 100%

How should funds be collected



Base: All stakeholders; n = 274

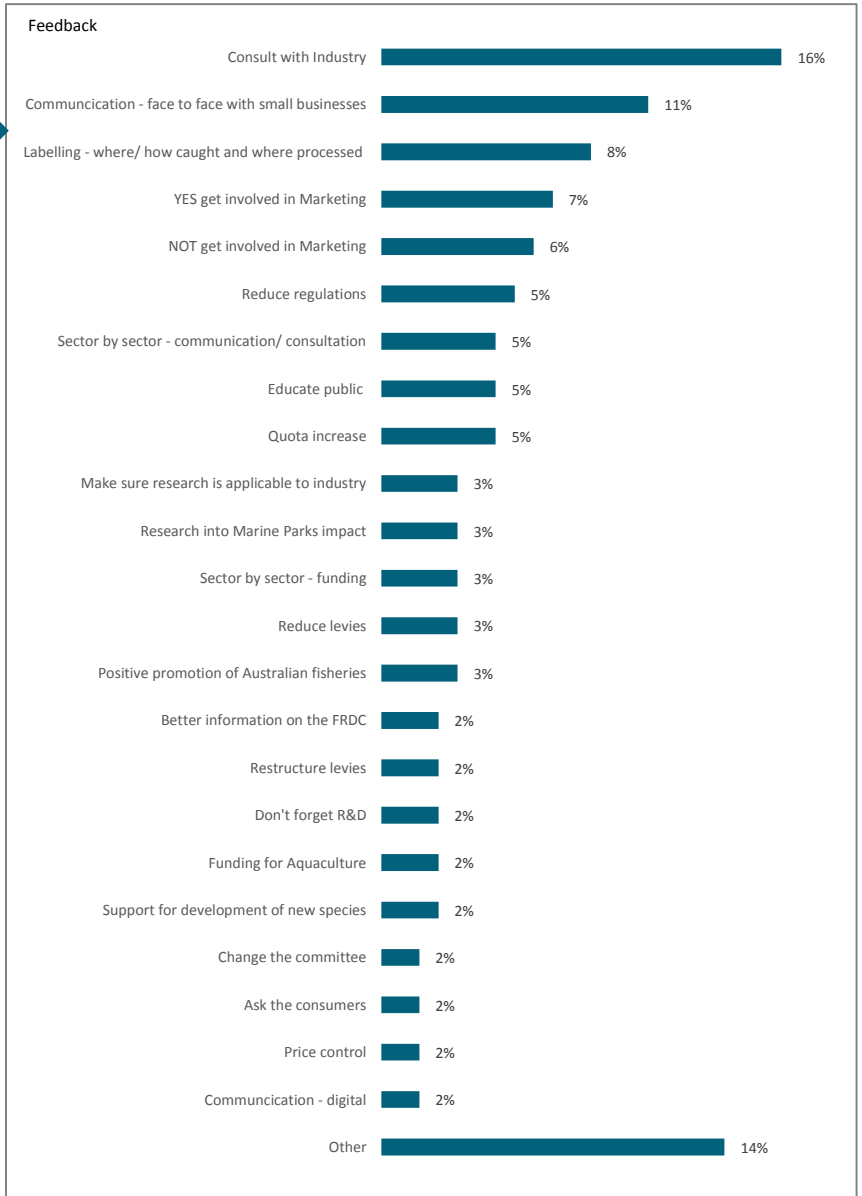
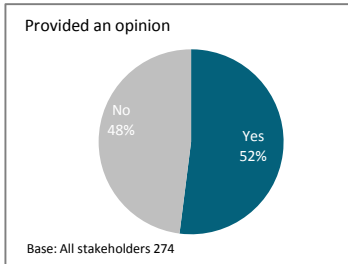
What we asked:

How should the national seafood marketing plan measure success of its marketing investments?

And which of these would you say should be the key outcome?

If whole of industry marketing was undertaken, what do you think would be the best way to collect funds from contributing stakeholders?

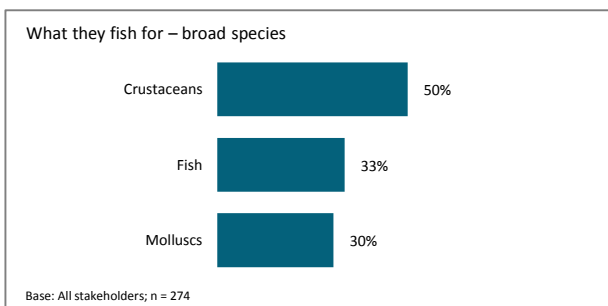
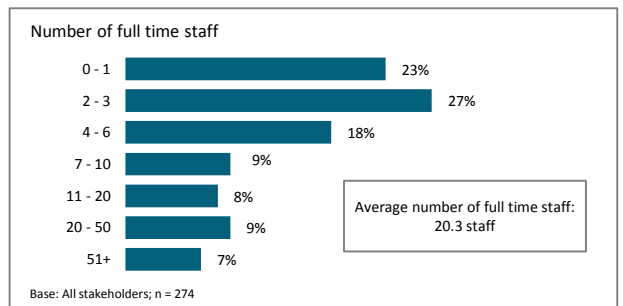
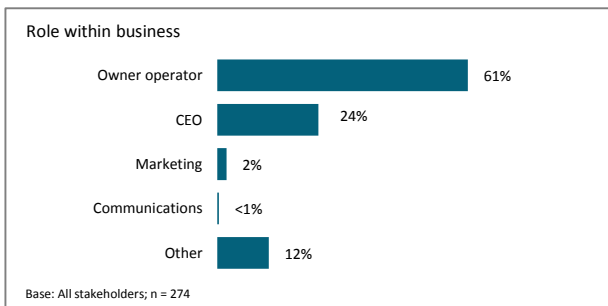
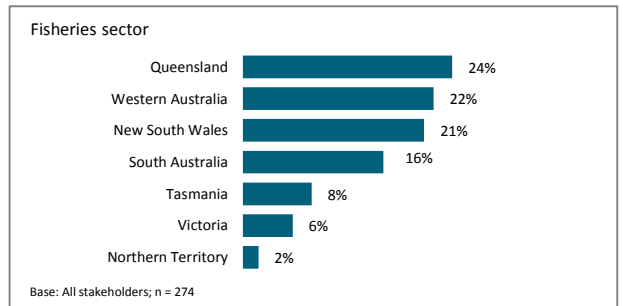
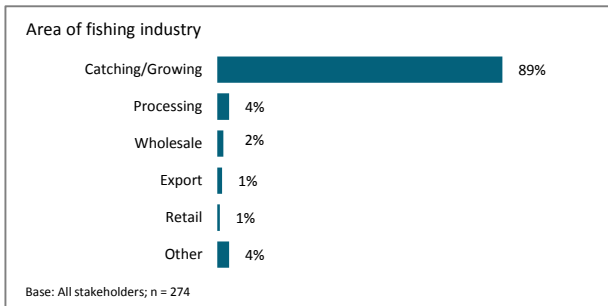
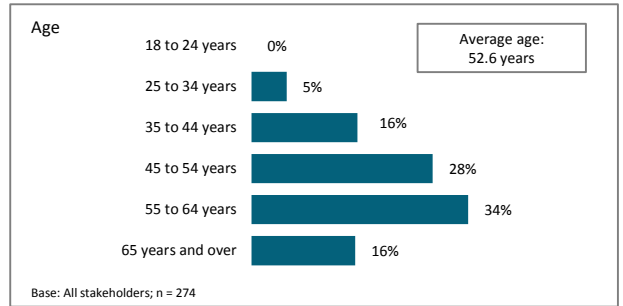
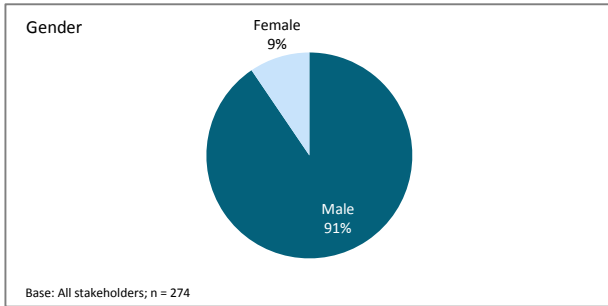
Feedback to the committee or FRDC as they work towards understanding what industry needs and wants them to achieve



What we asked:

Would you like to provide any feedback to the committee or FRDC as they work towards understanding what industry needs and wants them to achieve?

who we spoke to



What we asked:
 Gender
 Which of the following age groups do you belong to?
 Which of the following best describe your role within the fishing business you work for?
 And which area of the fishing industry do you operate in?
 And how many full time staff are employed by your business or organisation?

appendix

Their feelings on the future of the fishing industry over the next 12 months

	Overall	Size		Fishery				Fish for			Direct Contact with FRDC	
		Top 300	300+	QLD	NSW	WA	SA	Crustaceans	Fish	Molluscs	Yes	No
<i>Base:</i>	274	72	202	67	58	61	45	136	91	83	137	137
Positive	58%	60%	57%	43%	69%	61%	69%	52%	51%	65%	60%	55%
Neither positive nor negative	22%	21%	22%	25%	17%	23%	16%	24%	21%	22%	23%	21%
Negative	20%	19%	21%	31%	14%	16%	16%	24%	29%	13%	18%	23%

Their feelings on the future of their business over the next 12 months

	Overall	Size		Fishery				Fish for			Direct Contact with FRDC	
		Top 300	300+	QLD	NSW	WA	SA	Crustaceans	Fish	Molluscs	Yes	No
<i>Base:</i>	274	72	202	67	58	61	45	136	91	83	137	137
Positive	69%	74%	68%	66%	78%	74%	64%	64%	60%	77%	72%	67%
Neither positive nor negative	13%	13%	13%	10%	7%	13%	22%	14%	14%	11%	14%	12%
Negative	18%	14%	19%	24%	16%	13%	13%	22%	25%	12%	15%	21%

Their description of the public's perception of the fishing industry

	Overall	Size		Fishery				Fish for			Direct Contact with FRDC	
		Top 300	300+	QLD	NSW	WA	SA	Crustaceans	Fish	Molluscs	Yes	No
<i>Base:</i>	274	72	202	67	58	61	45	136	91	83	137	137
Positive	36%	35%	37%	27%	50%	39%	38%	32%	34%	46%	34%	39%
Neither positive nor negative	26%	35%	23%	27%	29%	28%	22%	24%	30%	22%	26%	26%
Negative	37%	31%	40%	46%	21%	33%	40%	43%	36%	33%	39%	35%

What are the sources of funding for FRDC?

	Overall	Size		Fishery				Fish for			Direct Contact with FRDC	
		Top 300	300+	QLD	NSW	WA	SA	Crustaceans	Fish	Molluscs	Yes	No
<i>Base:</i>	251	67	184	60	54	55	43	121	81	82	137	114
Government contributions	71%	76%	70%	83%	63%	67%	72%	70%	77%	70%	80%	61%
Contributions from licence holders	59%	70%	55%	38%	63%	55%	81%	52%	57%	70%	70%	46%
Other	7%	1%	9%	5%	7%	9%	7%	5%	5%	6%	7%	7%
None	12%	7%	13%	13%	15%	5%	7%	12%	12%	10%	7%	17%

Do they pay a contribution to FRDC?

	Overall	Size		Fishery				Fish for			Direct Contact with FRDC	
		Top 300	300+	QLD	NSW	WA	SA	Crustaceans	Fish	Molluscs	Yes	No
<i>Base:</i>	251	67	184	60	54	55	43	121	81	82	137	114
Yes	58%	76%	52%	40%	67%	51%	72%	52%	58%	74%	68%	46%
No	29%	13%	35%	50%	22%	31%	21%	35%	31%	13%	20%	40%
Not sure	12%	10%	13%	10%	11%	18%	7%	13%	11%	12%	12%	13%

Importance of in organisation like FRDC

	Overall	Size		Fishery				Fish for			Direct Contact with FRDC	
		Top 300	300+	QLD	NSW	WA	SA	Crustaceans	Fish	Molluscs	Yes	No
<i>Base:</i>	272	71	201	66	57	61	45	135	90	83	137	135
0-4	4%	7%	3%	9%	2%	2%	4%	5%	7%	4%	1%	7%
5-7	20%	18%	21%	21%	26%	23%	11%	23%	19%	18%	11%	30%
8-10	75%	75%	76%	70%	72%	75%	84%	72%	74%	78%	88%	63%
Mean:	8.5	8.3	8.5	8.0	8.6	8.6	8.8	8.3	8.3	8.8	9.1	7.8

What we asked:

How would you describe your feeling about the future of the fishing industry over the next 12 months? Would you say you are...

How would you describe your feeling about the future of your business over the next 12 months?

How would you describe the public's perception of the fishing industry?

To the best of your knowledge what are the sources of funding for FRDC?

Do you pay a contribution to FRDC to manage and invest in research & development on behalf of the fishing industry?

How important is it for the Australian fishing industry to have an organisation like FRDC?

What do they think their contribution pays for? Total mentions

	Overall	Size		Fishery				Fish for			Direct Contact with FRDC	
		Top 300	300+	QLD	NSW	WA	SA	Crustaceans	Fish	Molluscs	Yes	No
<i>Base:</i>	146	51	95	24	36	28	31	63	47	61	93	53
On boat/on farm/in business research and development	71%	71%	72%	58%	78%	71%	77%	73%	66%	75%	77%	60%
Post farm research and development	58%	59%	58%	50%	64%	54%	55%	52%	57%	64%	67%	43%
FRDC Administration	21%	24%	20%	29%	14%	29%	19%	19%	19%	20%	18%	26%
Domestic marketing/market development/promoting products and industry	7%	10%	5%	4%	11%	4%	3%	5%	4%	8%	9%	4%
Information services	5%	2%	6%	0%	8%	7%	3%	6%	6%	3%	5%	4%
Training and education	5%	4%	5%	0%	8%	0%	0%	2%	6%	10%	6%	2%
Trade policy/Trade development/International marketing	4%	6%	3%	4%	6%	0%	3%	5%	2%	5%	6%	0%
Extension services	3%	2%	3%	4%	6%	0%	3%	3%	2%	3%	3%	2%
Management of issues relating to the fishing industry that arise in the media	2%	2%	2%	4%	3%	4%	0%	5%	4%	0%	2%	2%
Other	6%	8%	5%	8%	6%	7%	6%	6%	11%	5%	5%	8%
Don't know	14%	16%	14%	25%	11%	11%	13%	16%	15%	13%	11%	21%

Satisfaction with levies

	Overall	Size		Fishery				Fish for			Direct Contact with FRDC	
		Top 300	300+	QLD	NSW	WA	SA	Crustaceans	Fish	Molluscs	Yes	No
<i>Base:</i>	274	72	202	67	58	61	45	136	91	83	137	137
How levies are spent	6.0	5.6	6.1	5.8	6.0	6.3	6.0	5.9	5.9	6.0	6.8	5.1
<i>Base:</i>	251	67	184	60	54	55	43	121	81	82	137	114
Opportunity to have a say where levies are invested	5.9	5.9	5.9	5.2	6.1	6.4	5.6	5.6	5.9	6.3	6.6	4.9

*Have you done any of the following...

	Overall	Size		Fishery				Fish for			Direct Contact with FRDC	
		Top 300	300+	QLD	NSW	WA	SA	Crustaceans	Fish	Molluscs	Yes	No
<i>Base:</i>	251	67	184	60	54	55	43	121	81	82	137	114
Received any FRDC publications	87%	91%	86%	88%	87%	89%	81%	88%	88%	89%	96%	77%
Attended a conference, workshop or event where the FRDC have attended	37%	40%	35%	28%	30%	33%	53%	32%	40%	43%	67%	0%
Been contacted by the FRDC	30%	34%	28%	20%	26%	24%	40%	28%	32%	29%	55%	0%
Participated in any FRDC events or activities	27%	36%	24%	23%	19%	29%	35%	26%	37%	26%	50%	0%
Contacted FRDC	22%	25%	21%	17%	13%	27%	28%	20%	27%	16%	40%	0%
Participated in a FRAB process	14%	12%	14%	10%	15%	11%	7%	10%	12%	18%	25%	0%

Satisfaction with how FRDC engage with industry

	Overall	Size		Fishery				Fish for			Direct Contact with FRDC	
		Top 300	300+	QLD	NSW	WA	SA	Crustaceans	Fish	Molluscs	Yes	No
<i>Base:</i>	274	72	202	67	58	61	45	136	91	83	137	137
0-4	23%	24%	22%	33%	21%	13%	20%	25%	25%	22%	15%	31%
5-7	48%	46%	49%	44%	46%	58%	44%	52%	44%	43%	40%	57%
8-10	29%	30%	29%	23%	32%	28%	36%	24%	32%	35%	46%	12%
Mean:	5.8	5.8	5.8	5.0	6.1	6.3	6.1	5.5	5.7	6.2	6.7	4.9

What we asked:

To the best of your knowledge what does your contribution pay for?

Taking into account all of the things that we have discussed so far, overall how satisfied are you that your contributions are being invested wisely and for the benefit of stakeholders?

And overall how satisfied are you that people like yourself or your industry representative bodies are given an adequate opportunity to have a say in the way in which your contributions are invested?

In the last 12 months have you...

Thinking about all these areas that we have discussed, overall, how satisfied are you with the way in which FRDC engages with businesses like yours?

Mean satisfaction with investment direction

	Overall	Size		Fishery				Fish for			Direct Contact with FRDC	
		Top 300	300+	QLD	NSW	WA	SA	Crustaceans	Fish	Molluscs	Yes	No
<i>Base:</i>	251	67	184	60	54	43	43	121	81	82	137	114
Contributions invested in areas that are relevant to their business	5.6	5.5	5.7	4.8	5.9	6.5	5.6	5.5	5.5	6.0	6.3	4.8
Contributions invested in areas that creates new technology	5.6	5.6	5.6	5.3	5.6	6.3	4.9	5.7	5.7	5.4	6.3	4.7
Contributions invested in areas that give access to knowledge of best practice	5.4	5.2	5.5	4.9	5.9	6.0	4.9	5.5	5.3	5.8	6.1	4.6
Contributions invested in areas that deliver the innovation required to keep the industry competitive	5.2	5.3	5.2	4.7	5.6	5.6	4.7	5.1	5.2	5.2	5.8	4.5
Contributions invested in areas that help adapts to the changing environment or markets	5.1	4.8	5.2	4.7	5.4	5.6	4.5	5.1	5.1	5.0	5.6	4.4
Contributions invested in areas that help businesses like you to increase your skills and prepare for the future	4.9	4.8	5.0	4.5	5.2	5.4	4.5	4.9	4.9	5.0	5.7	4.0
Contributions invested in areas that are meeting your needs	4.9	5.0	4.8	4.1	5.1	5.7	4.7	4.9	4.6	5.1	5.6	4.0
Contributions invested in areas that builds the image of the fishing industry to ensure it continues to attract people to the industry	4.8	4.9	4.7	4.4	5.0	4.7	5.0	4.5	4.8	5.0	5.3	4.0
Contributions invested in areas that have improved your business profitability	4.5	4.6	4.4	3.9	4.7	5.3	4.5	4.4	4.3	4.6	5.3	3.5

Mean satisfaction that contributions are being invested in areas that are important and matter to...

	Overall	Size		Fishery				Fish for			Direct Contact with FRDC	
		Top 300	300+	QLD	NSW	WA	SA	Crustaceans	Fish	Molluscs	Yes	No
<i>Base:</i>	251	67	184	60	54	43	43	121	81	82	137	114
The fishing industry	5.9	5.8	5.9	5.3	6.1	5.8	5.8	5.7	5.7	6.0	6.5	5.0
Your business	5.0	5.4	4.9	4.2	5.4	4.9	4.9	4.9	5.0	5.3	5.8	4.1

Visited FRDC's sites for information in the past 12 months?

	Overall	Size		Fishery				Fish for			Direct Contact with FRDC	
		Top 300	300+	QLD	NSW	WA	SA	Crustaceans	Fish	Molluscs	Yes	No
<i>Base:</i>	251	67	184	60	54	55	43	121	81	82	137	114
Website	36%	34%	37%	33%	31%	33%	47%	31%	43%	40%	53%	16%
Facebook	8%	10%	7%	3%	9%	13%	9%	8%	14%	7%	12%	3%
Twitter	1%	1%	1%	0%	2%	2%	0%	1%	2%	1%	2%	0%
None	62%	61%	63%	67%	69%	64%	51%	68%	53%	59%	45%	83%

Do they receive the FISH magazine?

	Overall	Size		Fishery				Fish for			Direct Contact with FRDC	
		Top 300	300+	QLD	NSW	WA	SA	Crustaceans	Fish	Molluscs	Yes	No
<i>Base:</i>	274	72	202	67	58	61	45	136	91	83	137	137
Yes	88%	92%	87%	85%	90%	89%	93%	87%	90%	93%	96%	81%
No	12%	8%	13%	15%	10%	11%	7%	13%	10%	7%	4%	19%

If so, in what format?

	Overall	Size		Fishery				Fish for			Direct Contact with FRDC	
		Top 300	300+	QLD	NSW	WA	SA	Crustaceans	Fish	Molluscs	Yes	No
<i>Base:</i>	242	66	176	57	52	54	42	118	82	77	131	111
Hard copy	66%	74%	63%	60%	66%	72%	73%	68%	67%	65%	63%	69%
Hard and electronic copy	18%	14%	19%	19%	17%	11%	16%	14%	20%	22%	26%	9%
Electronic copy	5%	4%	5%	6%	7%	5%	4%	4%	3%	6%	7%	3%

What we asked:

Now, taking into account your satisfaction with the programs FRDC invests in overall how satisfied are you that your contributions are being invested in areas that are important and matter to... ?
 I'd now like to know how satisfied you are with the R&D programs and projects that FRDC invests in. How satisfied are you that FRDC invests in areas that...
 In the past 12 months how often have you visited the following for information?
 FRDC produces the quarterly FISH magazine. Do you receive the FISH magazine?
 Do you keep your copy of FISH, pass it on to other work colleagues or people in the industry or discard it once you read it?

Where have they seen or heard anything about FRDC?

	Overall	Size			Fishery				Fish for			Direct Contact with FRDC	
		Top 300	300+	QLD	NSW	WA	SA	Crustaceans	Fish	Molluscs	Yes	No	
<i>Base:</i>	251	67	184	60	54	55	43	121	81	82	137	114	
FRDC FISH magazine	53%	51%	53%	62%	50%	47%	40%	54%	62%	50%	52%	54%	
Industry meetings	26%	40%	21%	13%	24%	31%	35%	25%	31%	28%	38%	12%	
Industry emails	18%	12%	20%	18%	15%	22%	21%	17%	20%	17%	25%	10%	
Fishing industry newsletters	12%	13%	12%	13%	9%	15%	14%	12%	10%	10%	12%	12%	
Conference, other event	10%	13%	9%	12%	7%	5%	14%	8%	9%	16%	18%	1%	
FRDC e-news	5%	3%	6%	10%	4%	4%	5%	6%	2%	4%	6%	4%	
FRDC website	5%	4%	5%	5%	2%	11%	5%	7%	6%	2%	7%	3%	
Metropolitan or national newspaper	4%	4%	4%	2%	0%	5%	7%	5%	5%	1%	7%	1%	
Television (unspecified)	4%	4%	4%	5%	2%	2%	7%	2%	7%	2%	7%	1%	
Blogs or online forums	3%	1%	3%	2%	7%	0%	5%	3%	2%	2%	4%	2%	
Local or regional newspapers	2%	3%	2%	2%	0%	0%	5%	2%	1%	4%	4%	0%	
Government information	2%	1%	3%	0%	2%	2%	0%	1%	2%	5%	4%	1%	
DPI newsletters	1%	0%	2%	0%	2%	2%	0%	2%	0%	2%	1%	1%	
Rural newspapers	<1%	0%	1%	0%	0%	0%	0%	1%	0%	1%	1%	0%	
Private consultants	<1%	1%	0%	0%	0%	0%	0%	0%	0%	1%	1%	0%	
Other	18%	16%	19%	20%	19%	20%	12%	19%	15%	22%	23%	12%	
Don't know	1%	1%	1%	0%	2%	2%	0%	2%	0%	0%	1%	1%	
Nowhere	8%	4%	9%	8%	9%	9%	7%	6%	6%	7%	1%	16%	

What they usually do when they receive the FISH magazine

	Overall	Size			Fishery				Fish for			Direct Contact with FRDC	
		Top 300	300+	QLD	NSW	WA	SA	Crustaceans	Fish	Molluscs	Yes	No	
<i>Base:</i>	242	66	176	57	52	54	42	118	82	77	131	111	
Read it thoroughly	46%	38%	49%	54%	50%	31%	36%	44%	41%	52%	51%	40%	
Just scan through it	53%	62%	49%	44%	48%	67%	64%	54%	59%	48%	48%	59%	
Don't read it at all	1%	0%	2%	2%	2%	2%	0%	2%	0%	0%	1%	2%	

What did they do with the FISH magazine after they finished reading it?

	Overall	Size			Fishery				Fish for			Direct Contact with FRDC	
		Top 300	300+	QLD	NSW	WA	SA	Crustaceans	Fish	Molluscs	Yes	No	
<i>Base:</i>	242	66	176	57	52	54	42	118	82	77	131	111	
Keep it	41%	41%	41%	46%	40%	41%	45%	45%	46%	38%	42%	41%	
Pass it on	36%	44%	34%	30%	31%	37%	33%	32%	34%	39%	44%	28%	
Discard it	22%	15%	25%	25%	29%	22%	21%	23%	20%	23%	15%	32%	

Did they follow up on info or stories they have seen in the FISH magazine to find out more details?

	Overall	Size			Fishery				Fish for			Direct Contact with FRDC	
		Top 300	300+	QLD	NSW	WA	SA	Crustaceans	Fish	Molluscs	Yes	No	
<i>Base:</i>	242	66	176	57	52	54	42	118	82	77	131	111	
Yes	47%	42%	49%	49%	48%	44%	43%	45%	46%	48%	61%	31%	
No	53%	58%	51%	51%	52%	56%	57%	55%	54%	52%	39%	69%	

Did they learn something new for their business, or introduce new systems, technologies or approaches to the way they do business?

	Overall	Size			Fishery				Fish for			Direct Contact with FRDC	
		Top 300	300+	QLD	NSW	WA	SA	Crustaceans	Fish	Molluscs	Yes	No	
<i>Base:</i>	114	28	86	28	25	24	18	53	38	37	80	34	
Yes	62%	54%	65%	57%	68%	67%	50%	60%	66%	68%	69%	47%	
No	38%	46%	35%	43%	32%	33%	50%	40%	34%	32%	31%	53%	

What we asked:

There are many places where you may hear or see information about FRDC. In the last 12 months, where have you seen or heard anything about FRDC?
 Which of the following best describes what you usually do when you receive the FISH magazine? Would you say you . . .
 Do you keep your copy of FISH, pass it on to other work colleagues or people in the industry or discard it once you read it?
 Which of the following best describes what you usually do when you receive the FISH magazine? Would you say you . . .
 Using a scale of 0 to 10, where 0 = poor and 10 = excellent, how would you rate the FISH magazine in terms of . . .

Satisfaction that the FISH magazine...

	Overall	Size		Fishery				Fish for			Direct Contact with FRDC	
		Top 300	300+	QLD	NSW	WA	SA	Crustaceans	Fish	Molluscs	Yes	No
<i>Base:</i>	242	66	176	57	52	54	42	118	82	77	131	111
That it is easy to read - that is not too technical but with the right amount of detail	8.3	7.9	8.5	8.2	8.4	8.4	8.3	8.2	8.3	8.3	8.5	8.1
The quality of the presentation of the magazine	8.2	7.8	8.4	8.4	8.5	8.0	8.2	8.2	8.2	8.2	8.3	8.1
Talks about issues relevant to the industry	7.7	7.2	7.9	7.5	7.8	7.9	7.7	7.6	7.7	7.6	8.1	7.3
Tells me about the breadth of R&D that is being supported through the contributions	7.3	6.7	7.5	7.3	6.9	7.4	7.3	7.1	7.2	7.2	7.9	6.5
Provides me with information that is useful for my business	6.1	6.0	6.1	5.8	6.4	6.4	6.2	6.1	6.3	6.3	6.5	5.6

Resources used to find information on research or to improve business - total mentions

	Overall	Size		Fishery				Fish for			Direct Contact with FRDC	
		Top 300	300+	QLD	NSW	WA	SA	Crustaceans	Fish	Molluscs	Yes	No
<i>Base:</i>	274	72	202	67	58	61	45	136	91	83	137	137
Other websites	26%	17%	30%	28%	29%	23%	27%	18%	27%	35%	31%	22%
Other operators	24%	24%	24%	24%	31%	18%	16%	19%	22%	31%	19%	29%
Fishing Industry Councils or Sector bodies	28%	29%	27%	24%	26%	25%	36%	26%	27%	33%	36%	20%
FRDC website	13%	14%	12%	12%	12%	18%	13%	13%	15%	11%	18%	7%
FRDC FISH Magazine	14%	11%	15%	15%	21%	10%	13%	15%	11%	19%	15%	12%
Government fisheries department	9%	8%	10%	7%	12%	16%	4%	11%	7%	10%	7%	12%
Government fisheries managers	9%	7%	10%	12%	9%	7%	4%	7%	12%	10%	11%	8%
Call the FRDC	6%	7%	6%	7%	2%	7%	9%	8%	7%	5%	10%	2%
Private consultants	4%	10%	2%	3%	2%	7%	7%	4%	7%	4%	5%	4%
CSIRO	3%	8%	1%	4%	2%	3%	0%	3%	7%	2%	5%	1%
DPI newsletters	3%	4%	2%	4%	3%	2%	0%	4%	1%	2%	2%	3%
Conferences, or other event	1%	0%	1%	0%	2%	2%	0%	0%	1%	1%	1%	0%
Blogs or online forums	1%	0%	1%	0%	2%	0%	2%	1%	2%	1%	2%	0%
FRDC social media pages	<1%	1%	0%	1%	0%	0%	0%	0%	1%	0%	0%	1%
Local or regional newspapers	1%	3%	0%	0%	0%	2%	2%	1%	1%	0%	1%	1%
Metropolitan or national newspapers	1%	3%	0%	0%	0%	0%	2%	1%	1%	0%	1%	1%
Rural newspapers	<1%	1%	0%	0%	0%	0%	0%	0%	1%	0%	0%	1%
Nowhere	16%	21%	14%	16%	19%	13%	13%	21%	15%	7%	9%	23%

How do they search the internet for information?

	Overall	Size		Fishery				Fish for			Direct Contact with FRDC	
		Top 300	300+	QLD	NSW	WA	SA	Crustaceans	Fish	Molluscs	Yes	No
<i>Base:</i>	274	72	202	67	58	61	45	136	91	83	137	137
On my laptop	44%	44%	44%	42%	48%	38%	53%	38%	56%	47%	50%	38%
On my desktop at work	37%	40%	36%	37%	28%	25%	47%	36%	46%	34%	45%	29%
On my desktop at home	36%	32%	37%	28%	38%	33%	42%	38%	38%	37%	34%	37%
On my smart phone	34%	36%	33%	19%	41%	34%	33%	29%	38%	41%	40%	27%
On my iPad (or other tablet device)	30%	33%	29%	21%	24%	31%	40%	28%	31%	36%	34%	26%
Don't use the internet	12%	14%	11%	19%	14%	15%	4%	15%	8%	8%	4%	20%

What we asked:

Using a scale of 0 to 10, where 0 = poor and 10 = excellent, how would you rate the FISH magazine in terms of . . .

Where do you normally go to find out information on research or to improve your business?

How do you usually search the internet for information? Do you usually do this on your computer, laptop, tablet or on your smart phone? Please select as many as apply

In the last 12 months, have they used any information or findings from research to make changes in their fishing business?

	Overall	Size			Fishery				Fish for		Direct Contact with FRDC	
		Top 300	300+	QLD	NSW	WA	SA	Crustaceans	Fish	Molluscs	Yes	No
<i>Base:</i>	274	72	202	67	58	61	45	136	91	83	137	137
Yes	47%	47%	47%	48%	48%	46%	36%	37%	49%	54%	59%	35%
No	53%	53%	53%	52%	52%	54%	64%	63%	51%	46%	41%	65%

Importance of marketing to their business/sector

	Overall	Size			Fishery				Fish for		Direct Contact with FRDC	
		Top 300	300+	QLD	NSW	WA	SA	Crustaceans	Fish	Molluscs	Yes	No
<i>Base:</i>	274	72	202	67	58	61	45	136	91	83	137	137
Important	92%	90%	93%	91%	91%	95%	91%	94%	90%	94%	97%	88%
Neither unimportant nor important	3%	4%	3%	1%	5%	2%	4%	2%	3%	4%	2%	4%
Unimportant	4%	6%	4%	7%	3%	3%	4%	4%	7%	2%	1%	8%

Do they currently invest in marketing?

	Overall	Size			Fishery				Fish for		Direct Contact with FRDC	
		Top 300	300+	QLD	NSW	WA	SA	Crustaceans	Fish	Molluscs	Yes	No
<i>Base:</i>	274	72	202	67	58	61	45	136	91	83	137	137
Yes, invest directly in marketing	44%	46%	43%	39%	40%	41%	47%	35%	49%	55%	55%	32%
Yes, invest at the sector level	14%	21%	11%	10%	17%	15%	13%	14%	11%	13%	18%	9%
No	42%	33%	46%	51%	43%	44%	40%	51%	40%	31%	26%	58%

Annual marketing spend

	Overall	Size			Fishery				Fish for		Direct Contact with FRDC	
		Top 300	300+	QLD	NSW	WA	SA	Crustaceans	Fish	Molluscs	Yes	No
<i>Base:</i>	158	48	110	33	33	34	27	66	55	57	101	57
< \$10k	37%	19%	45%	42%	67%	23%	28%	26%	36%	47%	30%	51%
\$10,000 - \$19,999	15%	14%	15%	10%	17%	16%	20%	23%	10%	20%	12%	20%
\$20,000 - \$49,999	17%	19%	16%	19%	13%	19%	16%	20%	16%	11%	20%	12%
\$50,000 - \$99,999	11%	19%	9%	13%	0%	16%	12%	8%	18%	9%	13%	8%
\$100,000 - \$249,999	9%	19%	6%	13%	0%	10%	16%	13%	12%	5%	11%	6%
\$250,000 - \$500,000	6%	7%	6%	0%	3%	10%	8%	7%	6%	2%	8%	2%
> \$500k	4%	5%	4%	3%	0%	6%	0%	3%	2%	5%	5%	2%
Mean annual spend	\$80.1k	\$106.4k	\$69.3k	\$60.8k	\$26.3k	\$109.0k	\$78.4k	\$83.0k	\$77.7k	\$62.0k	\$98.3k	\$45.5k

*What are their marketing priority areas for their business/sector?

	Overall	Size			Fishery				Fish for		Direct Contact with FRDC	
		Top 300	300+	QLD	NSW	WA	SA	Crustaceans	Fish	Molluscs	Yes	No
<i>Base:</i>	158	48	110	33	33	34	27	66	55	57	101	57
Advertising of my business/sector and the products we sell	42%	35%	45%	52%	55%	29%	33%	33%	47%	51%	44%	40%
Promoting the quality standards of our product to consumers	38%	33%	40%	45%	39%	41%	33%	36%	31%	39%	42%	32%
Educating consumers about my business/sector/products	24%	31%	21%	21%	18%	29%	19%	17%	29%	23%	30%	14%
Retaining, building and opening new local markets	22%	21%	22%	24%	27%	21%	19%	26%	24%	14%	19%	26%
Retaining, building and opening new international markets	19%	25%	16%	18%	12%	18%	30%	21%	20%	18%	21%	16%
Ensuring the public have a positive perception of my business/sector/products	8%	15%	5%	9%	6%	12%	7%	9%	16%	4%	10%	5%
Sustainability	4%	8%	3%	3%	6%	3%	0%	3%	7%	4%	5%	4%
Ensuring the public know that our product is safe to eat	2%	4%	1%	0%	0%	3%	4%	3%	4%	2%	2%	2%
Other	10%	10%	10%	6%	9%	12%	15%	11%	5%	7%	9%	12%

What we asked:

In the last 12 months have you used any information or findings from research to make changes in your fishing business?
 How important is marketing to your business/sector?
 Does your company currently invest in any marketing?
 As a guide only, which of the following categories best reflects your level of commitment to marketing?
 What are the marketing priority areas for your business/sector?

In the last 12 months, what marketing activities has their business/sector invested in?

	Overall	Size			Fishery				Fish for			Direct Contact with FRDC	
		Top 300	300+	QLD	NSW	WA	SA	Crustaceans	Fish	Molluscs	Yes	No	
<i>Base:</i>	158	48	110	33	33	34	27	66	55	57	101	57	
Social Media	20%	25%	17%	21%	24%	9%	11%	15%	22%	18%	23%	14%	
Newspaper	30%	23%	34%	30%	39%	26%	15%	29%	40%	25%	31%	30%	
Online	56%	52%	58%	55%	52%	59%	48%	56%	64%	51%	62%	46%	
Sponsorship	61%	56%	63%	52%	67%	56%	59%	61%	55%	68%	66%	51%	
Outdoor	59%	52%	63%	52%	61%	68%	56%	58%	64%	58%	66%	47%	
Radio ads	48%	46%	49%	55%	55%	41%	52%	47%	47%	49%	50%	46%	
TV ads	52%	44%	55%	48%	52%	50%	59%	52%	51%	49%	58%	40%	
Trade Shows	12%	13%	12%	15%	12%	9%	11%	14%	5%	11%	9%	18%	
Face to face	7%	6%	7%	12%	9%	0%	4%	6%	11%	9%	5%	11%	
Don't know	6%	15%	3%	3%	0%	12%	11%	8%	5%	4%	4%	11%	

Marketing activities your business/sector invested in

	Overall	Size			Fishery				Fish for			Direct Contact with FRDC	
		Top 300	300+	QLD	NSW	WA	SA	Crustaceans	Fish	Molluscs	Yes	No	
<i>Base:</i>	158	48	110	33	33	34	27	66	55	57	101	57	
General public - consumers of our product	35%	31%	37%	39%	45%	29%	22%	36%	33%	35%	39%	30%	
General public - everyone	24%	23%	25%	30%	24%	21%	26%	20%	29%	25%	20%	32%	
Wholesalers	22%	31%	17%	24%	15%	18%	41%	21%	27%	21%	24%	18%	
Out of home (restaurants, catering, etc.)	9%	8%	9%	3%	9%	18%	7%	12%	5%	7%	9%	9%	
Exporters	4%	0%	6%	0%	3%	12%	0%	5%	0%	5%	4%	5%	
Retailers	3%	4%	3%	3%	3%	3%	0%	6%	2%	4%	2%	5%	

What we asked:

Over the past twelve months, what marketing activities has your business/sector invested in?
Who does your marketing specifically target?

Aware of the Marketing Function Advisory Committee

	Overall	Size			Fishery				Fish for		Direct Contact with FRDC	
		Top 300	300+	QLD	NSW	WA	SA	Crustaceans	Fish	Molluscs	Yes	No
<i>Base:</i>	274	72	202	67	58	61	45	136	91	83	137	137
Yes	31%	39%	29%	33%	24%	28%	44%	33%	30%	31%	46%	17%
No	67%	60%	70%	64%	72%	72%	56%	65%	68%	66%	53%	82%
Not sure	1%	1%	1%	3%	3%	0%	0%	1%	2%	2%	1%	1%

Importance of national seafood marketing plan

	Overall	Size			Fishery				Fish for		Direct Contact with FRDC	
		Top 300	300+	QLD	NSW	WA	SA	Crustaceans	Fish	Molluscs	Yes	No
<i>Base:</i>	274	72	202	67	58	61	45	136	91	83	137	137
Important	80%	80%	80%	76%	84%	75%	80%	79%	84%	81%	86%	74%
Neither unimportant nor important	9%	7%	9%	10%	7%	11%	9%	9%	7%	8%	8%	9%
Unimportant	11%	13%	10%	13%	9%	13%	11%	13%	9%	11%	6%	16%

Likelihood to contribute to a national seafood marketing plan

	Overall	Size			Fishery				Fish for		Direct Contact with FRDC	
		Top 300	300+	QLD	NSW	WA	SA	Crustaceans	Fish	Molluscs	Yes	No
<i>Base:</i>	274	72	202	67	58	61	45	136	91	83	137	137
Likely	45%	49%	44%	47%	44%	38%	50%	47%	52%	46%	52%	39%
Neither likely nor unlikely	15%	17%	15%	12%	18%	17%	17%	13%	16%	17%	16%	15%
Unlikely	39%	34%	41%	41%	39%	45%	33%	40%	33%	37%	32%	47%

Belief that the seafood industry could deliver a national seafood marketing plan

	Overall	Size			Fishery				Fish for		Direct Contact with FRDC	
		Top 300	300+	QLD	NSW	WA	SA	Crustaceans	Fish	Molluscs	Yes	No
<i>Base:</i>	274	72	202	67	58	61	45	136	91	83	137	137
Yes	53%	51%	53%	43%	48%	57%	58%	51%	63%	48%	52%	53%
No	35%	39%	34%	43%	36%	26%	36%	34%	31%	40%	36%	34%
Not sure	12%	10%	13%	13%	16%	16%	7%	15%	7%	12%	12%	12%

Areas that should be invested in under a national seafood marketing plan

	Overall	Size			Fishery				Fish for		Direct Contact with FRDC	
		Top 300	300+	QLD	NSW	WA	SA	Crustaceans	Fish	Molluscs	Yes	No
<i>Base:</i>	274	72	202	67	58	61	45	136	91	83	137	137
Ensuring the public have a positive perception of the seafood industry	97%	95%	97%	98%	95%	95%	95%	96%	95%	96%	98%	95%
Education consumers about seafood	93%	89%	95%	95%	93%	93%	84%	91%	94%	93%	95%	91%
Ensuring the public know that seafood is safe to eat	89%	82%	92%	92%	89%	92%	79%	89%	91%	87%	92%	87%
Retaining, building and opening new local markets	85%	79%	87%	87%	86%	82%	84%	87%	85%	84%	85%	85%
Retaining, building and opening new international markets	81%	77%	82%	87%	75%	78%	79%	84%	84%	77%	81%	80%
Establishing quality standards for seafood products	80%	71%	83%	71%	77%	90%	79%	75%	79%	82%	83%	77%
Promotion/Advertising of seafood products	80%	74%	82%	81%	84%	83%	77%	79%	79%	80%	78%	82%

What we asked:

Before today, were you aware of the Marketing Function Advisory Committee?
 In your opinion, how important is it to have a national seafood marketing plan?
 How likely would your business be to consider making a financial contribution to a national seafood marketing plan?
 Do you believe that the seafood industry as a whole can work together to develop and then deliver a national seafood marketing plan?
 Which of the following areas do you believe should be invested in under a national seafood marketing plan?

How success of the National Seafood Marketing Plan should be measured – key outcomes

	Overall	Size			Fishery				Fish for			Direct Contact with FRDC	
		Top 300	300+	QLD	NSW	WA	SA	Crustaceans	Fish	Molluscs	Yes	No	
<i>Base:</i>	274	72	202	67	58	61	45	136	91	83	137	137	
Increased sales/revenue	24%	18%	26%	25%	21%	16%	33%	23%	21%	28%	23%	26%	
Increased market share	8%	11%	7%	6%	7%	8%	9%	8%	7%	6%	10%	6%	
Increased consumer brand/product awareness	12%	11%	12%	16%	7%	10%	11%	13%	14%	6%	8%	16%	
Profitability	24%	25%	23%	25%	33%	26%	13%	26%	26%	24%	24%	23%	
Increased brand/product knowledge understanding	5%	6%	5%	7%	5%	7%	2%	5%	7%	6%	5%	5%	
Stronger perceptions of brand/product	5%	7%	4%	1%	3%	3%	11%	6%	5%	6%	8%	2%	
Greater consideration of brand product	5%	7%	4%	6%	2%	7%	4%	4%	4%	4%	5%	4%	
Feedback - Industry	3%	3%	3%	1%	5%	5%	2%	4%	2%	2%	4%	4%	
Feedback - Consumer	0%	1%	0%	0%	0%	0%	0%	0%	1%	0%	1%	8%	
Industry growth	2%	1%	2%	1%	5%	0%	0%	1%	2%	4%	2%	2%	
Other	4%	6%	3%	3%	3%	7%	7%	4%	4%	6%	4%	0%	
Don't know	6%	3%	7%	4%	5%	10%	4%	7%	3%	6%	4%	2%	

How should funds be collected

	Overall	Size			Fishery				Fish for			Direct Contact with FRDC	
		Top 300	300+	QLD	NSW	WA	SA	Crustaceans	Fish	Molluscs	Yes	No	
<i>Base:</i>	274	72	202	67	58	61	45	136	91	83	137	137	
Collect it at the same time you pay your research and development levy	34%	32%	35%	25%	48%	34%	24%	29%	31%	49%	39%	29%	
Paid directly to FRDC through our sector	15%	17%	14%	18%	10%	13%	22%	15%	20%	11%	16%	14%	
Paid directly to FRDC by each company	8%	8%	7%	7%	7%	7%	7%	7%	11%	7%	7%	8%	
Paid to FRDC by the importers and exporters (funds paid from receipt)	19%	18%	20%	24%	17%	23%	16%	24%	18%	11%	10%	28%	
Other (please specify)	8%	8%	8%	4%	9%	7%	9%	7%	4%	11%	12%	4%	
Voluntary contribution	3%	6%	2%	4%	2%	3%	7%	4%	4%	2%	4%	3%	
Opposition to any fund collection	4%	1%	4%	3%	5%	5%	2%	4%	2%	4%	3%	4%	
No comment	9%	10%	8%	13%	2%	8%	13%	9%	10%	5%	8%	9%	

What we asked:
 How should the national seafood marketing plan measure success of its marketing investments?
 And which of these would you say should be the key outcome?
 If whole of industry marketing was undertaken, what do you think would be the best way to collect funds from contributing stakeholders?

research design

Questionnaire

A 30 minute survey was conducted with FRDC Stakeholders. This comprised of:

- Awareness of FRDC and what they do;
- Experiences and contact with FRDC; and
- Their behavior around marketing and thoughts on a national seafood marketing plan.

A range of Likert rating scale, closed and open-ended questions were used throughout the survey to collect the feedback from customers.

Methodology

The research involved computer assisted telephone interview (CATI) with a representative sample of stakeholders.

Sample

The list of respondents to the survey was provided by FRDC, which sourced the contact names from key industry associations and bodies.

Completes

In total 274 interviews were completed over the period. Quotas were set on business size, defined as:

- Large businesses n=72. For the purposes of the study this was defined as the top 300 business.
- Smaller businesses n=202. This included all business not within the top 300 business.

Timing

The research was conducted over the period 1st of December 2014 – 2nd of February 2015.