



 **FRDC** 2018 STAKEHOLDER TRACKING  
COMMERCIAL STAKEHOLDERS

JULY 2018

The 2018 FRDC Stakeholder Engagement research was a multi-staged project undertaken over the period June – July 2018. It involved three stages of work:

- A quantitative survey of non-commercial fisher stakeholders. The survey was undertaken via an online survey using contact details provided by FRDC from their CRM.
- A quantitative survey of commercial fisher stakeholders. The survey was undertaken using a mixed mode data collection method (combination of online and telephone surveys) again using contact details provided by FRDC from their CRM.
- A qualitative study among FRDC key stakeholders. This was undertaken as an in-depth, one on one telephone interview with a range of identified key stakeholders. This included stakeholders across Government, research, industry and business. A list of key stakeholders was provided by FRDC.

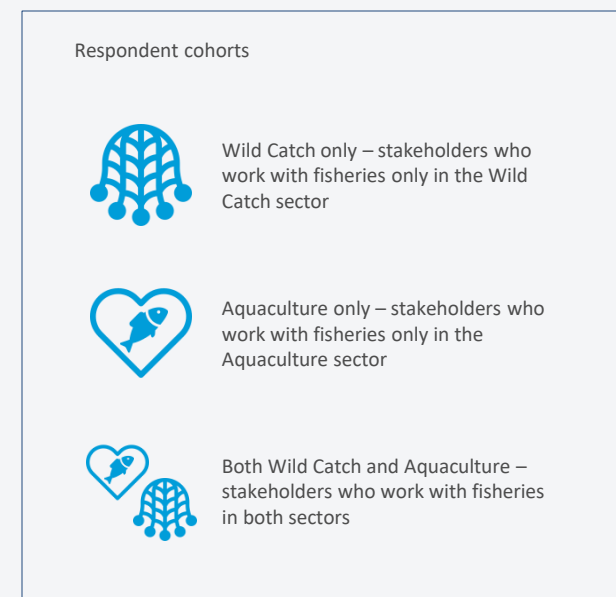
This report provides a summary of the results from the second of these stages – a survey of commercial fisher stakeholders. Results from the other stages of the program are reported separately.

It is important to note that the research respondents were sourced from FRDC CRM data. This may well imply some connection and engagement between stakeholders and FRDC ahead of the survey questions. The variation in response to the survey invitation does indicate that the CRM data does in fact include stakeholders who have an active as well as less than active engagement with FRDC.

Respondents to the commercial stakeholder survey included three cohorts as shown opposite – whether a stakeholder works with fisheries in the Wild Catch sector only, in the Aquaculture sector only, or a combination of both Wild Catch and Aquaculture.

The survey set to explore and measure the level of awareness, understanding of FRDC, their engagement and experience with engaging with FRDC and their satisfaction with the engagement, the R&D investments and the organisation overall.

An overview of the results now follows. Along with these detailed results, additional sub-group analysis and specific details of feedback provided are also available as part of the deliverables from this stage of the program of research.



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## KEY RESULTS AND INSIGHTS

# KEY RESULTS... AT A GLANCE

## Satisfaction of contributions by sector of industry



6.2

Satisfaction that contributions to FRDC are being invested wisely



5.8

Wild catch only



6.9

Aquaculture only



6.5

Both wild catch and aquaculture



6.3

Likelihood to recommend FRDC



61%

are **positive** about the future of the fishing and aquaculture in Australia over the next 12 months

## DISPOSITION



8.1

Importance of having an organisation like FRDC

## KNOWLEDGE & UNDERSTANDING

98%

have **heard of** FRDC when prompted

69%

could **identify** FRDC as the organisation responsible for managing/investing in R&D

65%

could **accurately describe** FRDC's role and responsibilities

## ENGAGEMENT



5.7

Satisfaction with how FRDC engages with businesses



5.8

Adequate opportunity to have their say

## INVESTMENT



6.0

Satisfaction that contributions are being invested in areas that matter to **the fishing industry**

5.0

Satisfaction that contributions are being invested in areas that matter to **your business**

The following discussion provided a summary of the key insights from the feedback provided in the commercial FRDC stakeholder survey.

As noted above, this survey included responses from fishers across a range of cohorts – aquaculture and wild catch, across jurisdictions and across species. Response across these cohorts varied with different sample sizes in each. The overall results presented in this report are presented as a simple average of all respondents and so do not necessarily reflect the current mix of different commercial fishers with which FRDC engages with.

What was clear from the survey results was that:

- Commercial fishers reported a positive view about the future of the fishing and aquaculture sectors and their businesses (Net Industry Sentiment of +38 and +37 respectively).
- While 6 in 10 are positive about both industry and business, there remains 2 in 10 who are negative about the future.
- Commercial fishers operating in the aquaculture (production) sector were more positive (+87 and +65) compared to fishers operating in the wild catch sector (+9 and +18).
- There was a good level of awareness and understanding of the role FRDC plays across the industry (65% could identify this). That said, there is clearly opportunity to deepen commercial fishers understanding of FRDC (for example 34% reported to be unaware of RACs).
- Like the non-commercial stakeholders, commercial fishers generally acknowledge the value and benefit that an industry service body like FRDC can offer the fishing and aquaculture industry (importance rating of 8.1 out of a possible 10).
- There is however a small cohort (17%) who saw little importance in having an R&D organisation like FRDC. This small group is likely to require additional engagement to better understand the disconnect with FRDC.
- Similar to the result achieved among non-commercial stakeholders, the results are indicating that FRDC has been effective in reaching most commercial fishers either directly or indirectly through the combination of publications, communications, traditional and digital channels and the more personal touch points. What is evident from the research is that the direct engagement has a more powerful impact on commercial fisher perceptions than the mainstream communications through publications.

The results also clearly show that:

- There is a different experience between commercial fishers operating in wild catch compared to aquaculture. Wild catch commercial fishers were consistently more critical than aquaculture fishers:

	Overall	Wild catch only	Aquaculture only	Both wild catch and aquaculture
Satisfaction that contributions to FRDC are being invested wisely	6.2	5.8	6.9	6.5
Likelihood to recommend FRDC	6.3	5.9	6.9	6.7
Satisfaction that contributions are being invested in areas that matter to <b>the fishing industry</b>	6.0	5.4	6.9	6.9
Satisfaction that contributions are being invested in areas that matter to <b>your business</b>	5.0	4.5	5.7	5.8

- Commercial fishers vary in their level of direct engagement with FRDC (direct engagement typically involves one-to-one interactions with FRDC). The analysis demonstrates fishers with a higher intensity of direct engagement (48% report multiple touchpoint interactions) typically report stronger levels of satisfaction across all metrics.
- By comparison, some 52% have low intensity engagement with FRDC and also lower levels of satisfaction. These results looked to have been shaped by the lack of familiarity with FRDC, and the research, activities and promotions undertaken by FRDC. This appears to have translated to lower ratings.

- Like non-commercial stakeholders, two important influences on stakeholders overall assessment are their views on the opportunity to ‘have their say’ and with the investments undertaken by FRDC. While the challenge of engaging with a diverse range of commercial fishers is obvious, the challenge for FRDC will be to establish frameworks and processes that enable this dialogue and sharing of information.
- Again similar to non-commercial stakeholders, when preferences for providing feedback to FRDC were sought, no consistent opportunity was identified. FRDC may need to consider whether existing opportunities have sufficient visibility with these stakeholders, or whether further work is required to understand what opportunities may help bridge this gap in expectations.

The detailed results from the survey of commercial fishers now follows.

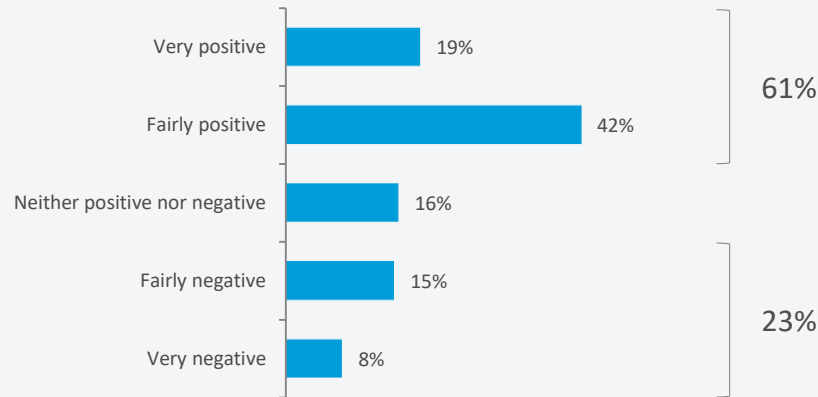


# INDUSTRY SENTIMENT



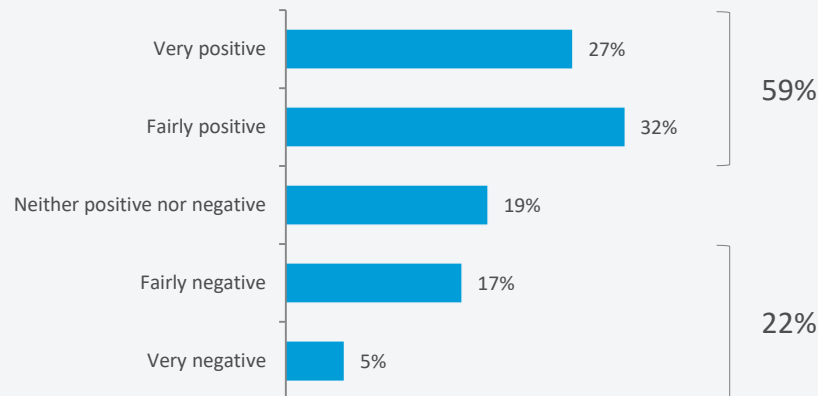
## How would you describe your feelings about the future of the fishing and aquaculture in Australia over the next 12 months? Would you say you are...

Base: All commercial stakeholders, n = 163.



## How would you describe your feelings about the future of your business over the next 12 months? Would you say you are...

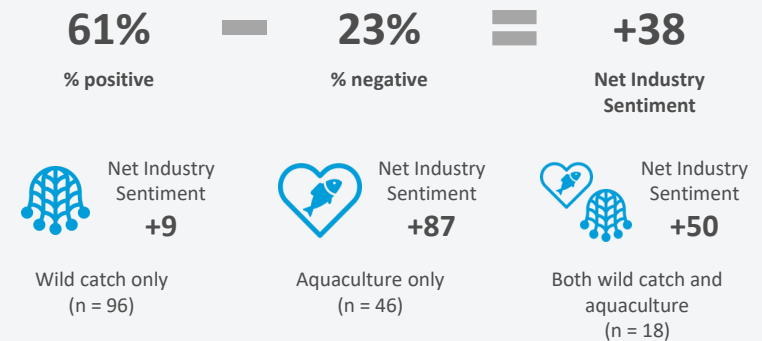
Base: All commercial stakeholders, n = 163.



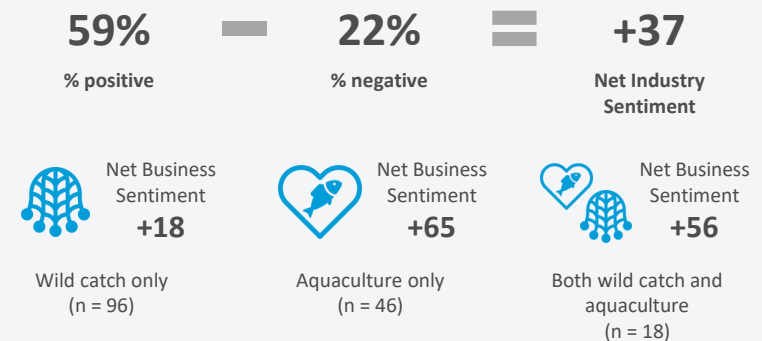
### Net Sentiment Scores

Grouping the positive and negative responses to the right, we can create a Net Sentiment Score which describes the difference in proportion of stakeholders who feel more positive against those who feel negative.

### Net Industry Sentiment

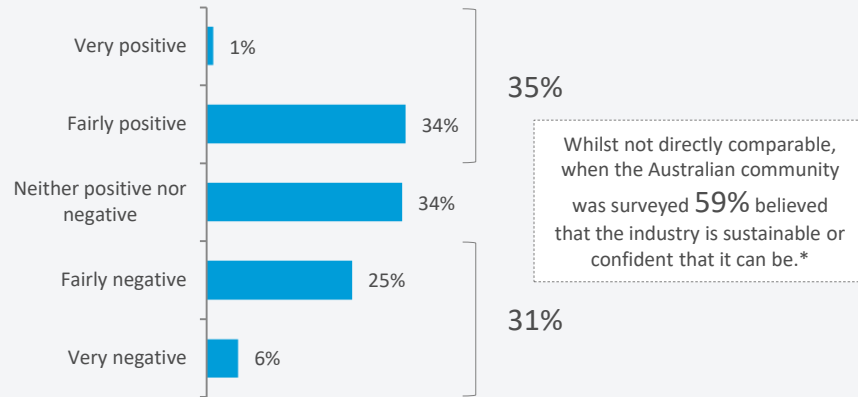


### Net Business Sentiment

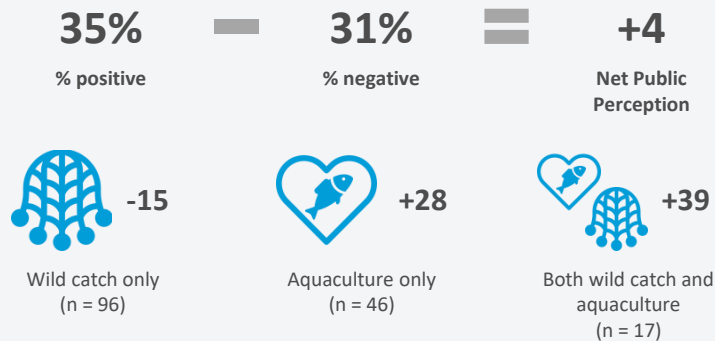


## How would you describe the public's perception of the fishing and aquaculture in Australia?

Base: All commercial stakeholders, n = 163.



## Net Public Perception



## What do you think should be done about improving the public's perception?

Base: All commercial stakeholders who describe the public's perception of the industry as "negative", n = 50 (48 comments provided).

Educate the public about the benefits of aquaculture

*"More proactive public education via TV Programs like Seafood Escape with ET. Govt. and Fisheries Managers publically supporting Professional Fishermen. Legislation making it illegal for ENGO's to Publically Slander Professional Fishing Industry. (Currently, numerous ENGO's daily releasing false and/or biased, public media statements making untrue claims constantly attacking the Fishing Industry). Rarely rebutted. Need to build trust with the public, and recreational Fishers, whom also, are regularly publically attacking Professionals."*

*"I think the public think of fishers not caring for the ocean. That we just take everything and leave nothing. Rape and pillage. This is our lively hood. We depend of the ocean being healthy, and that our reefs are healthy. We need this for the sustainability of our industry and for our children. We should be thought of as the 'caretakers' not in a negative light."*

*"In QLD we desperately need effort reduction, and better management, mainly in the inshore fisheries. When this is done we need to sell the message that industry is sustainable, both environmentally and financially. We as an industry have to make the public look at their own 'back yards' so us commercial fishers can take the high moral ground."*

*"If the public knew more about the aquaculture sector of fisheries. There should be more education in the system for the kids at school as well as the adults about the various types of aquaculture and the possibilities for employment and business within that sector."*

*"Should be an advertising programme to let many people know we are not there to wipe out a population of fish, we are only there to supply fresh fish to the public."*

*"The fishing industry needs to tell its positive message of sustainable harvest and custodianship of the fish and marine environment in a continued manner."*

*"Let them know the fisheries are regulated, the fisherman let the crabs breath, different regulations, for different fish."*

Demonstrate quality environmental management and animal welfare

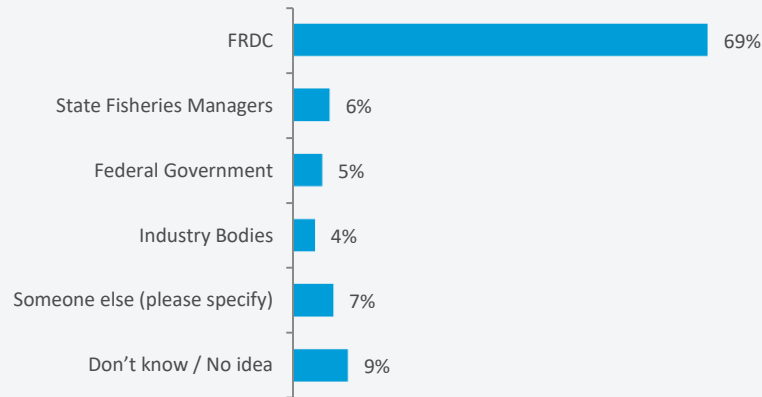
A full list of responses provided by stakeholders can be found in the Analysis and Verbatim Report.



# AWARENESS AND UNDERSTANDING OF FRDC

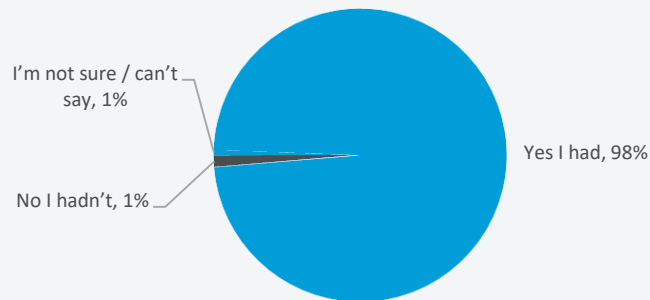
## Which national organisation is responsible for managing and investing in Research and Development across the fishing and aquaculture in Australia?

Base: All commercial stakeholders, n = 163.



## Before today, had you heard of Fisheries Research and Development Corporation or FRDC?

Base: All commercial stakeholders, n = 163.



## And what is your understanding of FRDC's role and responsibilities ?

Base: All commercial stakeholders who are aware of FRDC, n = 160 (149 comments provided).

65% of stakeholders could accurately describe what FRDC's role and responsibilities are

*"Commitment to Industry; Government & Consumers to research & develop science, technology, sustainability of the Aust. Fishing Industry (wild catch & aquaculture) for the benefit to a clearer understanding & to position us as leaders at the forefront to a 1st class worldwide standard."*

*"It's a centrally research organisation and highly supported of the fishing industry. We have done quite a lot of research in the sustainability in the fishing industry, its' research is often centred around improving social economic values of the fishing industry."*

*"It's a government sponsored research body. However it covers over a wild range of products. As a seafood trader internationally we tend to look into the product of our choice and we found that we learnt a lot through international seafood shows."*

*"Main funding body for the majority of research throughout Australia. Group that is providing direction and guidance for the whole of the aquaculture and fishing industry. A resource for information."*

*"Administer funds collected from Fishing licence fees and aquaculture permits to direct evidence based research into areas to enhance these sectors through best practise and governance."*

*"To promote and facilitate research into, and enhance management, conservation and safety of Australian fisheries - wild catch, aquaculture, indigenous and recreational."*

*"Partner with industry to determine priorities for research, fund the research, make sure the deliverables are met and publish and be the repository for research papers."*

*"Invest in research and development on behalf of the fisheries aquaculture and government."*

*"I like to think they are leading all research and development for the fisheries industry."*

*"Research of different fishing opportunities and access. To do research on the fishing."*

*"It covers: industry-relevant and public benefit RD&E, plus marketing (in some cases)."*

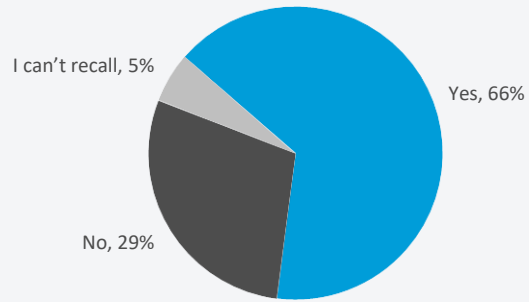
*"Researching new methods or markets and providing funds for research and development."*

*"They provide research projects and funding, and contributions into research projects."*

A full list of responses provided by stakeholders can be found in the Analysis and Verbatim Report.

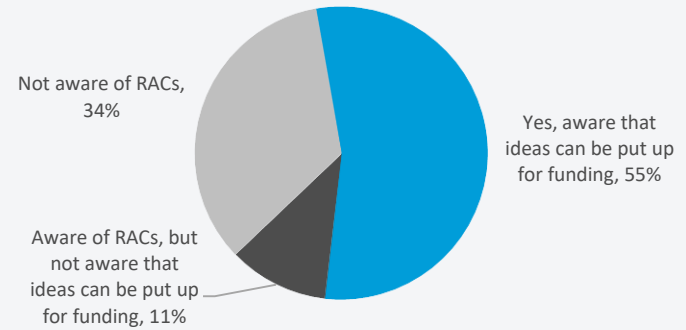
Are you aware that FRDC has a Research Advisory Committee (RAC) in each state with representation from industry to help plan and assess research applications?

Base: All commercial stakeholders, n = 163.



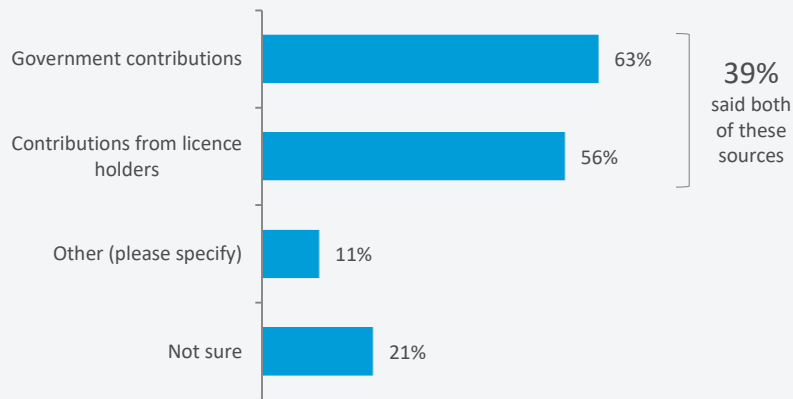
Were you aware that you can put your research ideas up to the RAC for funding?

Base: All commercial stakeholders, n = 163.



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

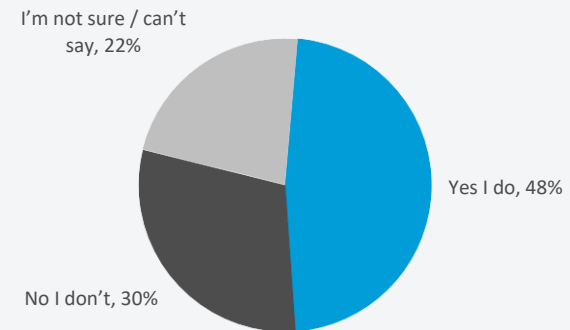
Base: All commercial stakeholders who are aware of FRDC, n = 160.



Multiple choice – responses may not add to 100%.

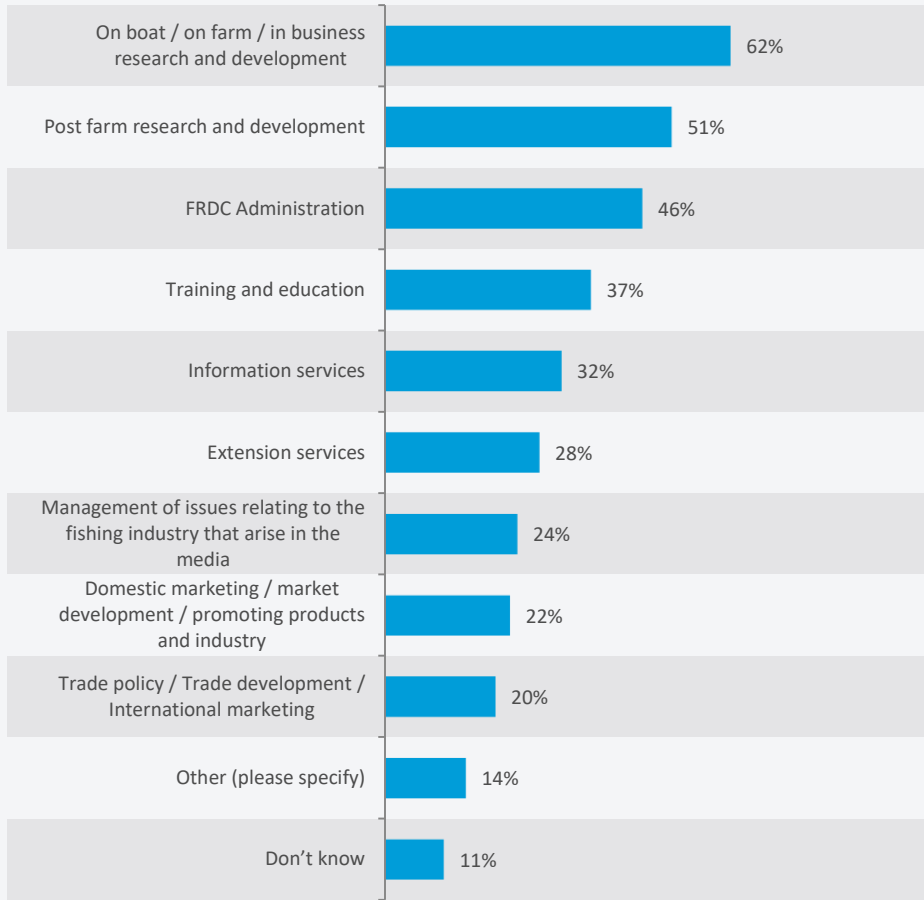
Do you pay a contribution to FRDC to manage and invest in research & development on behalf of fishing and aquaculture in Australia?

Base: All commercial stakeholders who are aware of FRDC, n = 160.



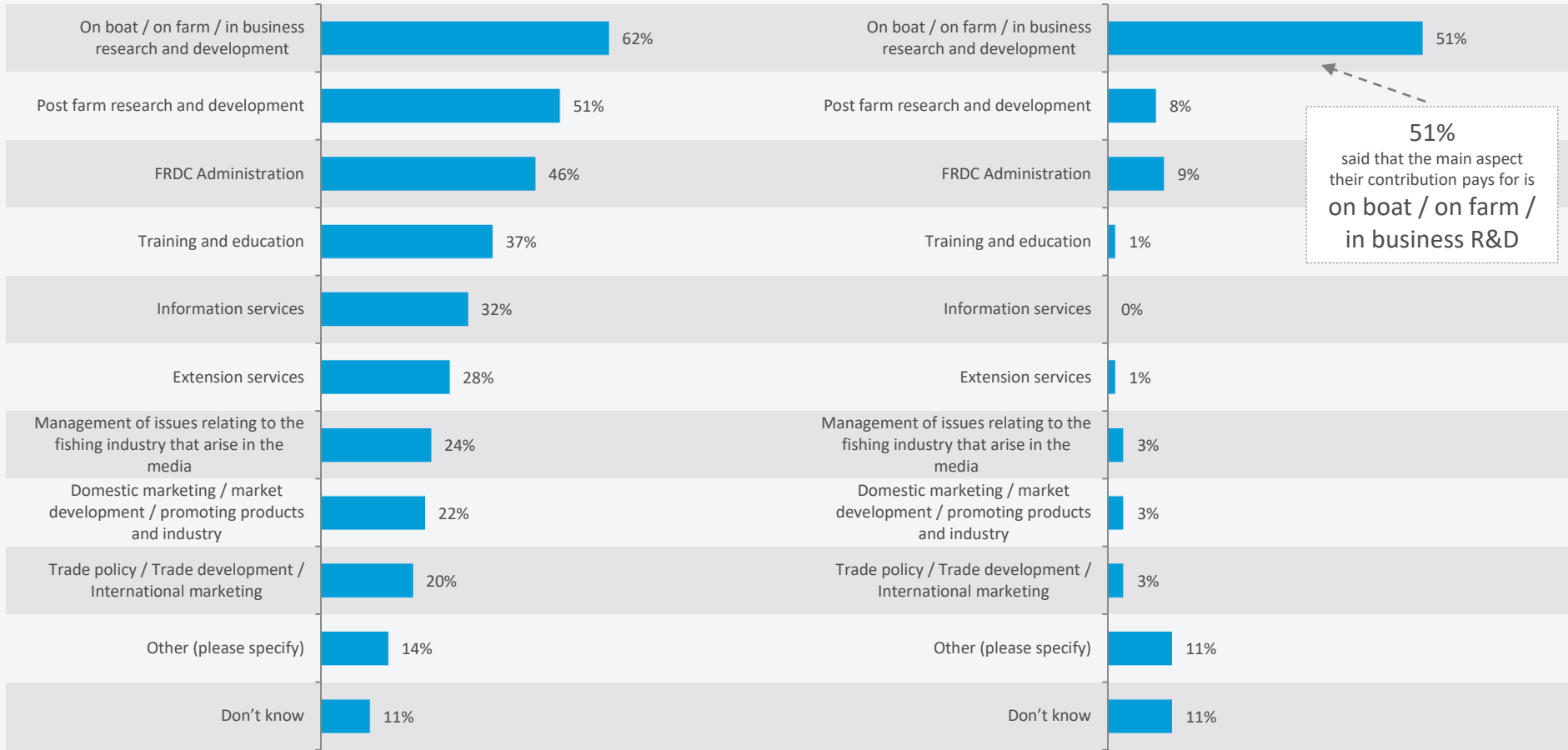
## To the best of your knowledge, what does your contribution pay for?

Base: All commercial stakeholders who pay a contribution to FRDC, n = 76.



## And what is the main aspect your contribution pays for?

Base: All commercial stakeholders who pay a contribution to FRDC, n = 76.



Multiple choice – responses may not add to 100%.

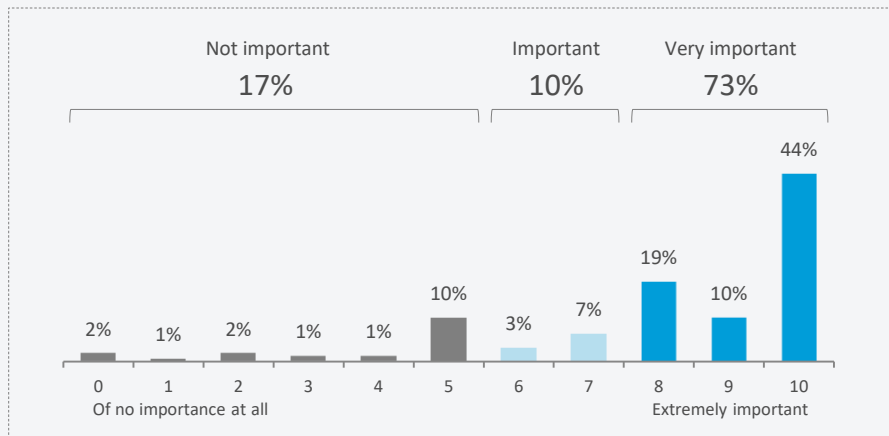
## How important is it for fishing and aquaculture to have an organisation like FRDC?

Base: All commercial stakeholders (excluding "Don't know" answers), n = 155.



8.1

Importance of having an organisation like FRDC



## Importance of FRDC by sector of industry



7.6

Wild catch only  
(n = 89)



8.7

Aquaculture only  
(n = 46)



8.9

Both wild catch and aquaculture  
(n = 17)



# STAKEHOLDER ENGAGEMENT WITH FRDC



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?

Base: All commercial stakeholders (excluding "Don't know" answers), n = 157.



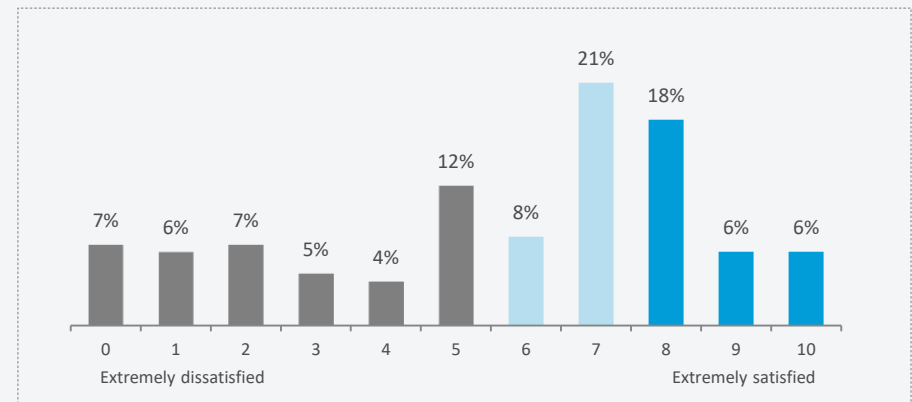
5.7

Satisfaction with the way FRDC engages with businesses

Satisfaction by level of engagement with FRDC (excluding publications)

None or one touchpoint: 4.3

Two or more touchpoints: 7.1



Satisfaction with the way FRDC engages by sector of industry



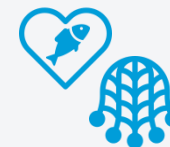
5.4

Wild catch only  
(n = 91)



5.9

Aquaculture only  
(n = 45)

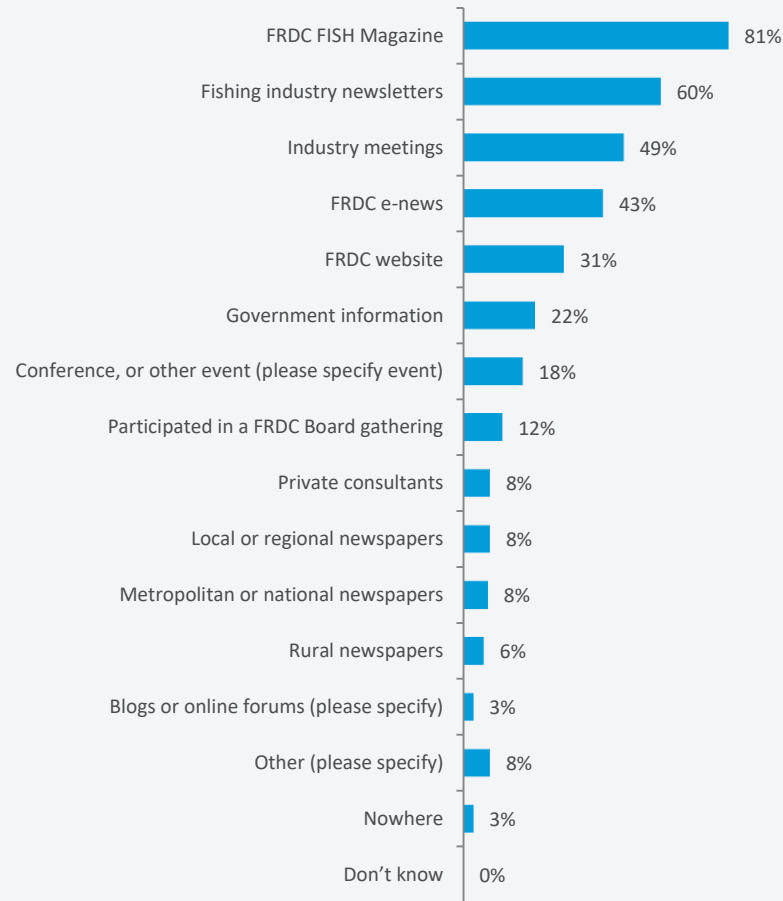


6.1

Both wild catch and  
aquaculture  
(n = 18)

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?

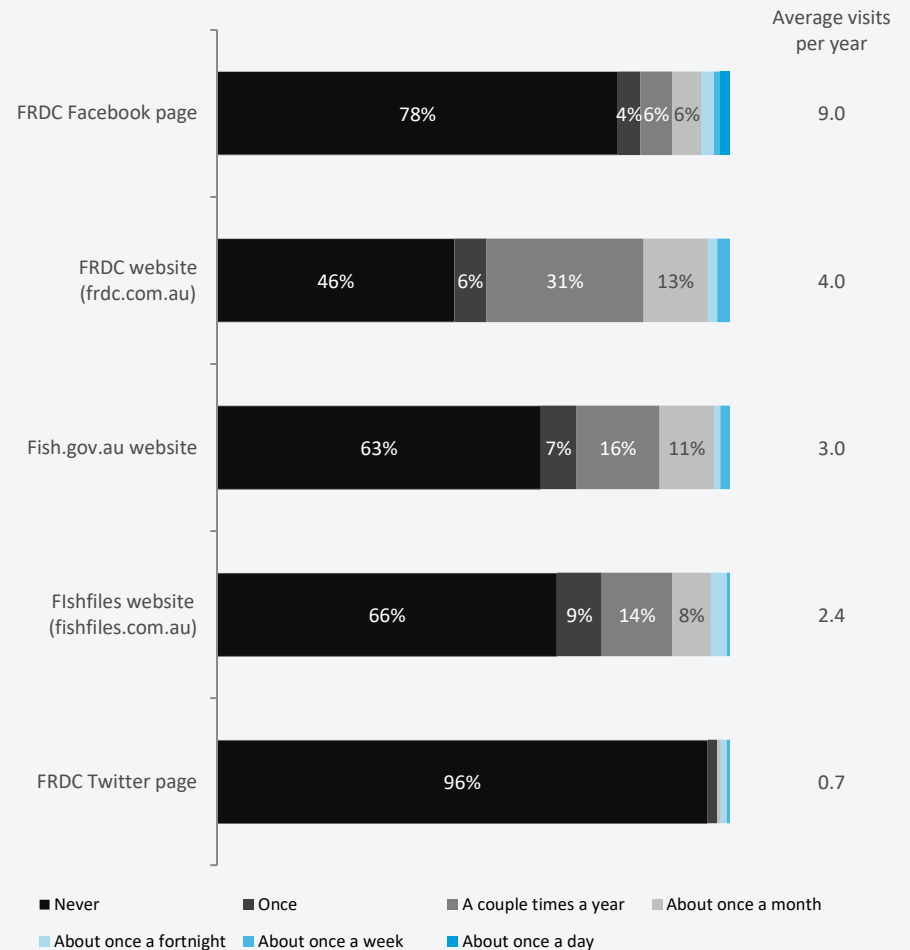
Base: All commercial stakeholders who are aware of FRDC, n = 160.



Multiple choice – responses may not add to 100%.

In the past 12 months, how often have you visited the following for information?

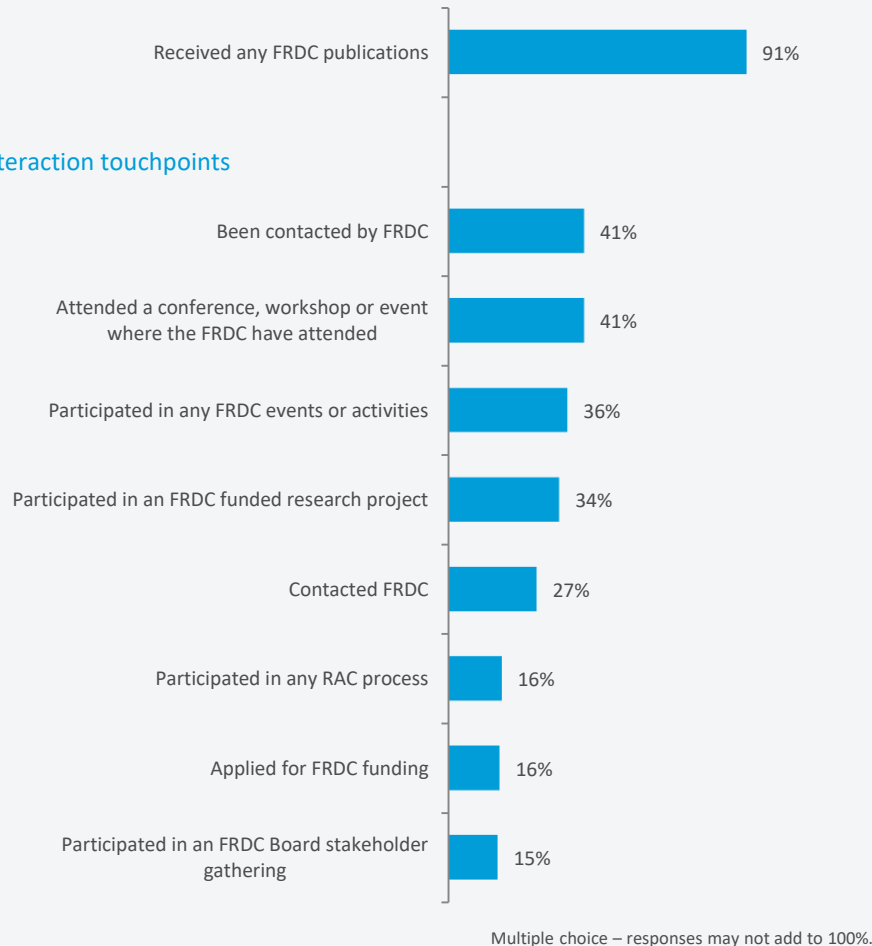
Base: All commercial stakeholders who are aware of FRDC, n = 160.



## In the last 12 months have you...

Base: All commercial stakeholders who are aware of FRDC, n = 160.

### Interaction touchpoints

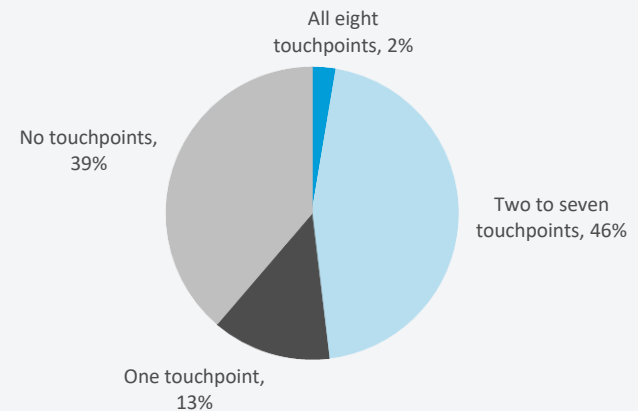


*There are many different ways a stakeholders can have an engagement with FRDC. These “touchpoints” (as displayed on the left) can be segmented to show cohort that have no, little, or a lot of engagement with FRDC through their many contact pathways.*

*For the purposes of the segmentation below, we have not included the touchpoint “Received any FRDC publications” as this is experienced by 91% of respondents. Hence, there are eight touchpoints varying from “Been contacted by FRDC” (41%) to “Participated in an FRDC Board stakeholder gathering” (15%) that stakeholders may have experienced in any combination.*

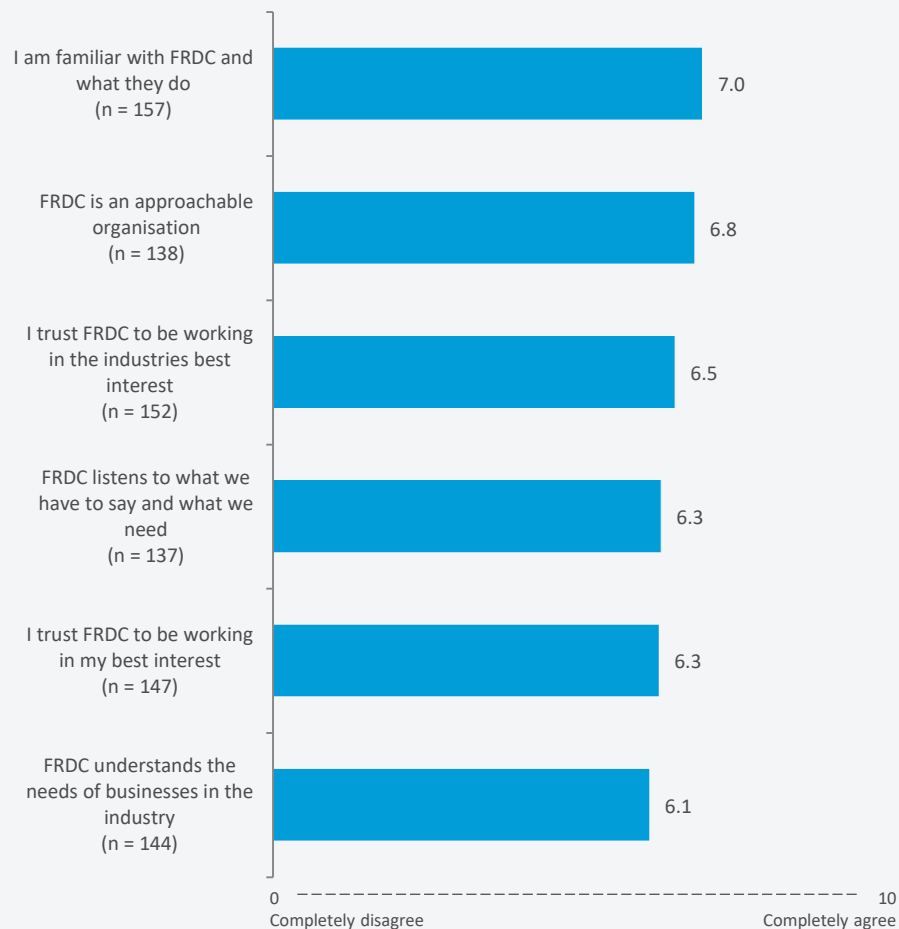
### Number of touchpoints with FRDC in the last 12 months (excluding publications)

Base: All commercial stakeholders who are aware of FRDC, n = 160.



Using a scale of 0 to 10 where 10 is ‘completely agree’ and 0 is ‘completely disagree’, how strongly do you agree with the following comments?

Base: All commercial stakeholders who are aware of FRDC (excluding “Don’t know” answers), n varies.



Engagement ratings by level of engagement with FRDC (excluding publications)

Base: All commercial stakeholders who are aware of FRDC (excluding “Don’t know” answers), n varies.

	No touchpoints	One touchpoint	Two to seven touchpoints	All eight touchpoints
<i>Base:</i>	59	21	73	4
I am familiar with FRDC and what they do	5.3	6.9	8.2	9.8
<i>Base:</i>	43	19	72	4
FRDC is an approachable organisation	4.8	6.4	8.0	9.8
<i>Base:</i>	54	21	73	4
I trust FRDC to be working in the industries best interest	4.8	6.9	7.6	9.0
<i>Base:</i>	43	19	71	4
FRDC listens to what we have to say and what we need	4.3	6.1	7.4	9.0
<i>Base:</i>	49	21	73	4
I trust FRDC to be working in my best interest	4.4	5.9	7.5	9.0
<i>Base:</i>	47	21	72	4
FRDC understands the needs of businesses in the industry	4.6	5.3	7.2	8.8

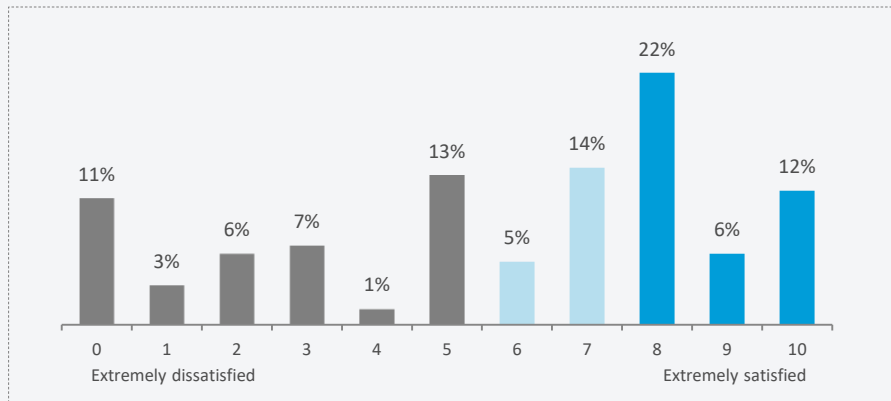
And overall how satisfied are you that people like yourself or your industry representative bodies are given an adequate opportunity to have a say in the way in which your contributions are invested?

Base: All commercial stakeholders who are aware of FRDC (excluding "Don't know" answers), n = 147.



5.8

Adequate opportunity to have their say



## Adequate opportunity to have their say by sector of industry



5.2

Wild catch only  
(n = 86)



6.7

Aquaculture only  
(n = 42)



6.3

Both wild catch and aquaculture  
(n = 16)

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

Base: All commercial stakeholders who are aware of FRDC, n = 160 (110 comments provided).

*"Need to look more at the rapid shift in politics backing rec sector over commercial and provide feedback to political powers that the recreational misinformation agenda is not scientific nor is it in the best interest of the general public and consumer... the main body of the community is not being represented."*

*"Too much focus and power given to the small number of people who have the time to participate on the RAC and these positions tend to not be filled by 'industry' people. Need to ensure stronger industry participation in the RAC processes to ensure funding is being reinvested appropriately to benefit industry."*

*"FRDC should contact exporters of processors to learn the market situations locally and internationally. Supply and demand of all seafood items are fluctuating due to seasons as well as political environments. Communication between bodies such as FRDC and exporters to us has become of prime importance."*

*"Yes, meet with fishing charter representatives in Western Australia and explain how FRDC can assist our industry and at the same time get an overview of the state of the fishing charter industry in Western Australia of which there are 236 licensed fishing tour operators."*

*"The people like me that are small operators can't compete with corporations. We have been stripped of our catch quota and basically are not active, but we are paying up to \$10,000 a year to pay for our licence. Can't sell the licence and can't fish to maintain it."*

*"I think we should have better communication with them for the whole of the workforce, not just the hierarchy or management but flowing down to all the workers about what's going on and what's happening with the FRDC."*

*"There is a selective interactive process that disadvantages many in the industry. I would say that more than 50% of the wild harvest industry would not know what FRDC does at all."*

*"They can get out of the city and come and see the operation we do, so we are sustainably and economically viable fishery with proper harvest strategies and access."*

*"It would be handy to have a contact person on the newsletters when they come in, so we can see who the Western Australian delegates are so we can contact them."*

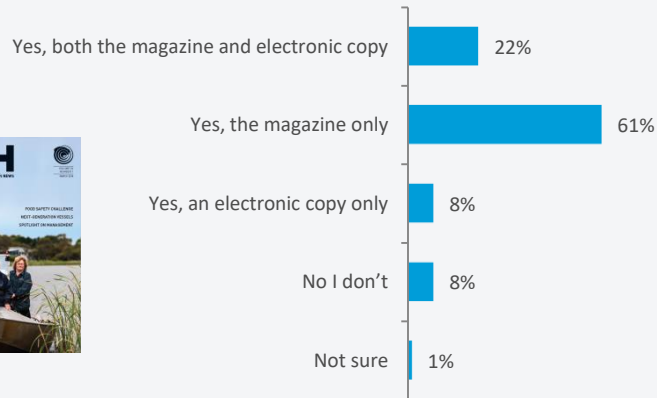
*"I don't know. Perhaps they could hold a general/introductory session in small towns (e.g. Townsville) titled 'what the FRDC do for the aquaculture industry'."*

*"Have a contributor's forum that is broader than the Board and the RAC. Open to anyone that pays a levy. No one else to attend except FRDC staff."*

A full list of responses provided by stakeholders can be found in the Analysis and Verbatim Report.

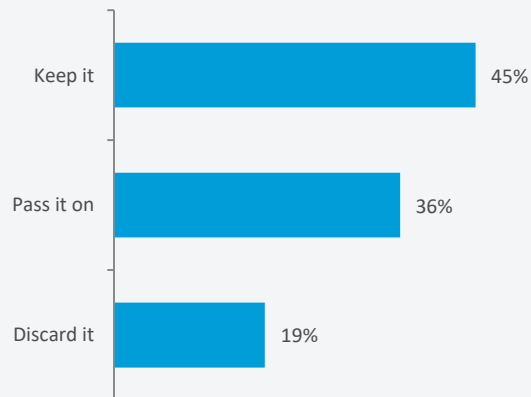
## FRDC produces the quarterly FRDC FISH magazine. Do you receive the FRDC FISH magazine?

Base: All commercial stakeholders, n = 163.



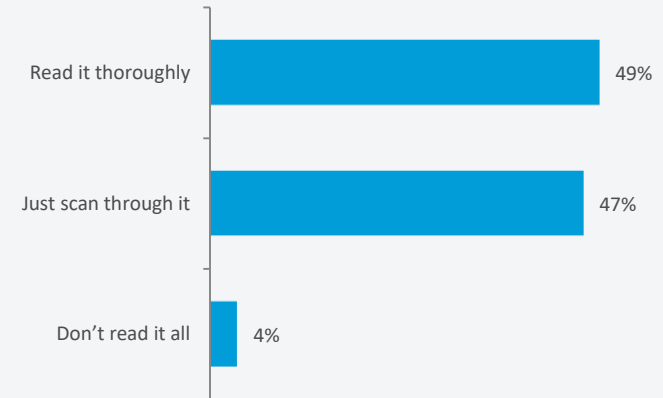
## Do you keep your copy of the FRDC FISH magazine, pass it on to other work colleagues or people in the industry or discard it once you read it?

Base: All commercial stakeholders who receive the FRDC FISH magazine, n = 148.



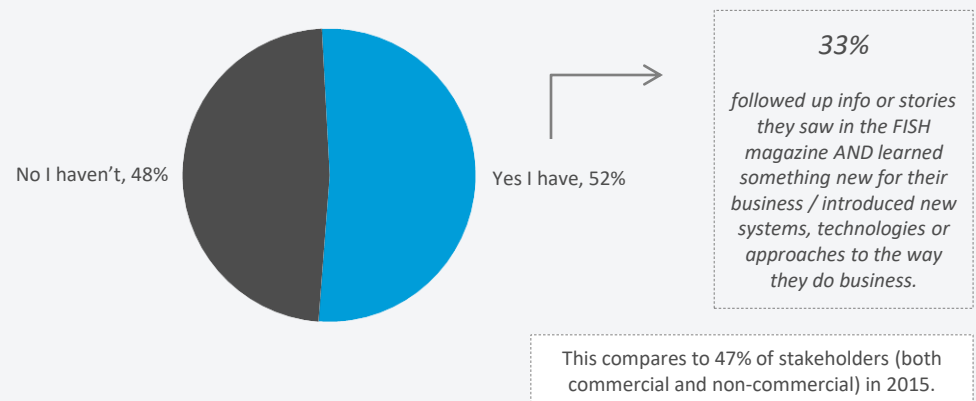
## Which of the following best describes what you usually do when you receive the FRDC FISH magazine? Would you say...

Base: All commercial stakeholders who receive the FRDC FISH magazine, n = 148.



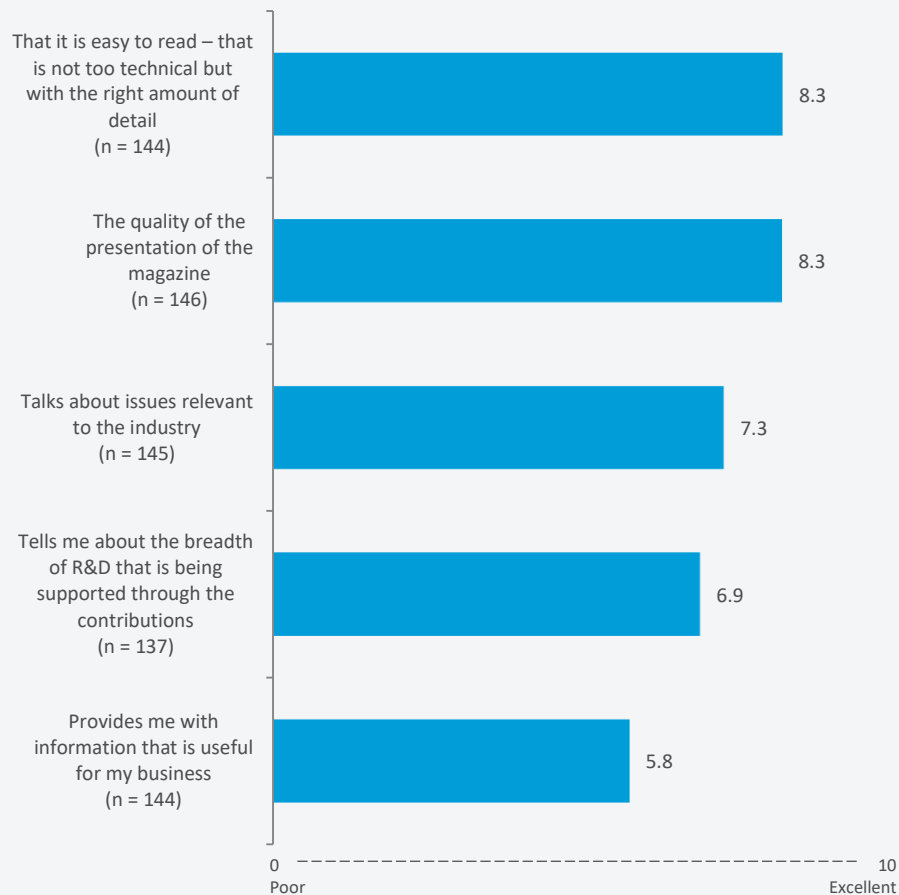
## Have you ever followed up information or stories you have seen in the FRDC FISH magazine to find out more details?

Base: All commercial stakeholders who receive the FRDC FISH magazine, n = 148.



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

Base: All commercial stakeholders who receive the FRDC FISH magazine (excluding "Don't know" answers), n varies.



## If you could change one thing about the FRDC FISH magazine, what would it be?

Base: All commercial stakeholders who receive the FRDC FISH magazine, n = 148 (100 comments provided).

*"Have more in the magazine about abalone fishing and what risks do we face in the abalone industry including the influence of China on the abalone industry. They seem to be becoming more involved in industries where they have an interest in the import of products and may get involved in the quotas of abalone."*

*"Include small independent farmers and small industries like the Yabbie industry. Include us, or why are we receiving the magazine at all?"*

*"Have a bit more consumer focus where you can use it as a tool for information for people outside the industry and can be used for promoting the fishing industry."*

*"It's very focused on Western Australia - there needs to be more focus on the Eastern states."*

*"More insight into research when it begins, not just at the conclusion and final publication."*

*"I would make it more relevant to fishers themselves, rather than the technical research."*

*"It should be 50% wild catch and 50% aquaculture with a focus on value added products."*

*"It is a public relations exercise, too many good stories and not enough bad stories."*

*"Be more farmgate profitability focused. Help me to get more out of my business."*

*"Make it bigger with more diverse information relative to the fishing industry."*

*"I would expand on the research project outcomes that are being presented."*

*"Make it cheaper and spend the money saved on stakeholder consultation."*

*"More about REAL people, not managers, consultants, scientists etc."*

*"More input from the industry themselves. An open letter section."*

*"Something relevant for South Australian Small Marine Scale Fishery."*

*"They need to talk to the fishermen. Not the investor."*

*"Like to see more Queensland content in the magazine."*

*"Article for each magazine on a grass roots fisher."*

A full list of responses provided by stakeholders can be found in the Analysis and Verbatim Report.

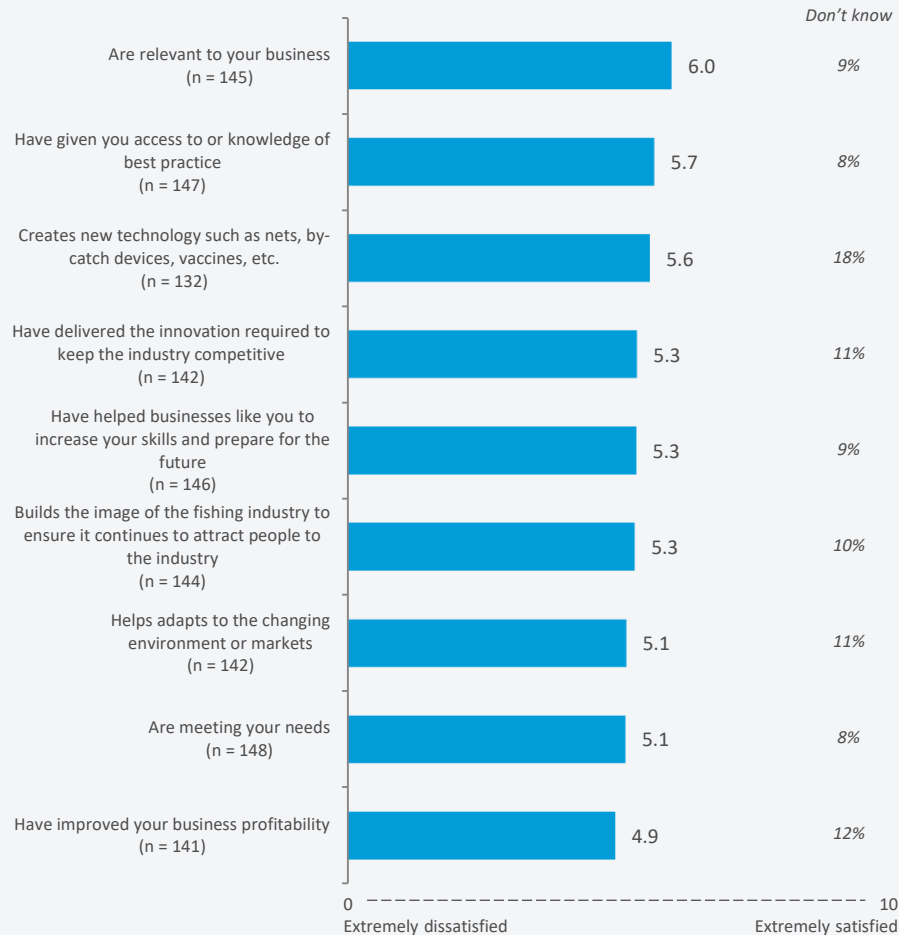


# STAKEHOLDER SATISFACTION WITH INVESTMENTS



Using a scale of 0 to 10 where 10 is 'extremely satisfied' and 0 is 'extremely dissatisfied', how satisfied are you that FRDC invests in areas that...

Base: All commercial stakeholders who are aware of FRDC (excluding "Don't know" answers), n varies.



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...?

Base: All commercial stakeholders who are aware of FRDC (excluding "Don't know" answers), n varies.



6.0

Satisfaction that contributions are being invested in areas that matter to **the fishing industry in general** (n = 141)



5.4

Wild catch only (n = 81)



6.9

Aquaculture only (n = 41)



6.9

Both wild catch and aquaculture (n = 16)



5.0

Satisfaction that contributions are being invested in areas that matter to **your business** (n = 137)



4.5

Wild catch only (n = 78)



5.7

Aquaculture only (n = 41)



5.8

Both wild catch and aquaculture (n = 15)

## Are there any issues facing the industry that you think require either more funding for research already underway or require new investment?

Base: All commercial stakeholders, n = 163 (123 comments provided).

### More research (e.g. animal welfare, environmental issues)

*"Scallops fisheries a lot needs to be learnt about it and we don't get clear and concise information with scientific investigations that have been done before."*

*"I'm not sure how you research declining specimen sea shell stocks that are plundered by poaching and unlicensed shell collectors."*

*"Given the diversity of fisheries in Australia, there is scope for a lot more research to be performed."*

*"Research ciguatera in Spanish Mackerel. Research of lifecycle of mudcrabs in certain areas."*

*"Oil & Gas Seismic research into the impacts of the fishing Industry wild catch grounds."*

### Biosecurity and disease control

*"We have a virus that is effecting us called POMS for pacific oysters and QX for rock oysters and I think more funding should be going into that research."*

*"Biotxin affecting rock lobster The dispersal of larvae and the origins of the young that settle in Tasmanian waters."*

*"White spot on Crays, sale of exotic species, uncontrolled breeding in the waterways."*

*"Management of exotic disease impacts on wild fisheries and natural ecosystems."*

*"Disease in oysters and alternatives to oysters to grow in the same water."*

*"Biosecurity and keeping diseases out of Australia."*

*"Impacts of release of carp virus."*

A full list of responses provided by stakeholders can be found in the Analysis and Verbatim Report.



# STAKEHOLDER SATISFACTION AND ADVOCACY

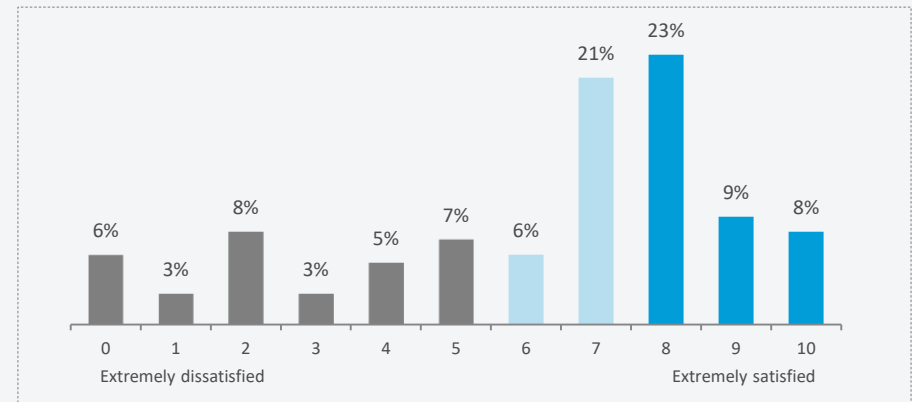
Taking into account all of the things that we have discussed so far, overall how satisfied are you that contributions from industry and Government to FRDC are being invested wisely and for the benefit of the industry?

Base: All commercial stakeholders (excluding "Don't know" answers), n = 150.



6.2

Satisfaction that contributions to FRDC are being invested wisely



Satisfaction that contributions are being invested wisely by sector of industry



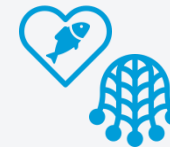
5.8

Wild catch only  
(n = 86)



6.9

Aquaculture only  
(n = 44)



6.5

Both wild catch and  
aquaculture  
(n = 17)

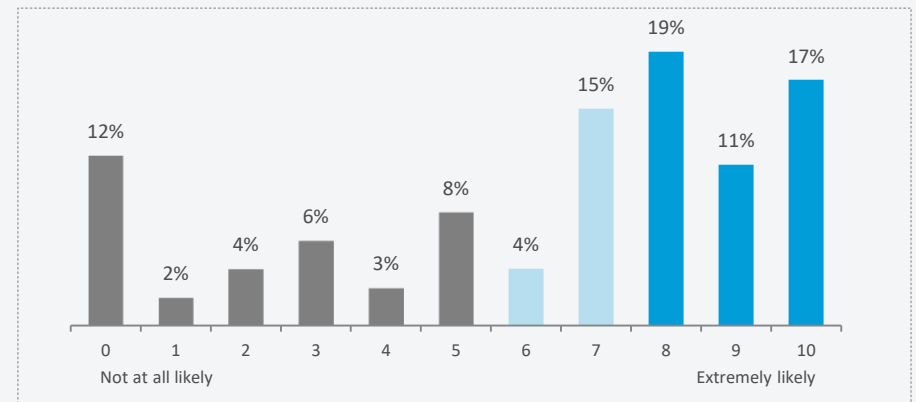
## How likely would you be to recommend FRDC to other people and businesses in the fishing industry?

Base: All commercial stakeholders (excluding "Don't know" answers), n = 153.



6.3

Likelihood to recommend FRDC



## Likelihood to recommend FRDC by sector of industry



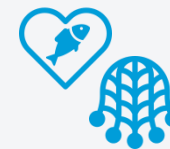
5.9

Wild catch only  
(n = 89)



6.9

Aquaculture only  
(n = 43)



6.7

Both wild catch and  
aquaculture  
(n = 18)



# INDUSTRY AND MARKETING

## Do you think there is one area all industry should work together to promote?

Base: All commercial stakeholders, n = 163 (127 comments provided).

### Sustainability (improvements to the environment)

*"That Wild Harvest Fisheries in Australia are Sustainable and that this is brought about by the Industry adapting to introduce the various methods now utilised to catch and harvest their product. That they have already been reduced in access and effort."*

*"Clean, Green, Sustainable, Family Fishing business. Health benefits, all seafood good; Aquaculture, Imported, Wild etc."*

*"Protection and management of seafood resource. Marine Stewardship. Protection of estuaries."*

### Promotion of Australian produce

*"I think from watching Australian products going forward to restaurant levels, we should be using Australian products in the restaurants as there is huge international competition."*

*"Promotion of Australian prawns and keeping them in Australia. Keep infected fish out of the country. Too much frozen virus filled fish comes into the country."*

*"Consumer awareness of the quality of southern Rock lobster as distinct from other lobster."*

### Promote/market the industry

*"As an industry we should work together, the entire SA seafood industry as a whole, wild catch or aquaculture regardless. Work together in promoting our industry."*

*"We are harvesting a renewable food resource that is now more and more being proved as sustainable so we are primary producers not fishers."*

*"Individual industry should get together to promote themselves as a specific fishery to cash in on national and international markets."*

A full list of responses provided by stakeholders can be found in the Analysis and Verbatim Report.

## What would be a “moonshot” change for the industry? I.e. something if we could do it would change the face of fishing and aquaculture in Australia...

Base: All commercial stakeholders, n = 163 (139 comments provided).

### Changing public perception of fisheries/fisherman

*“Remove the political statement ‘climate change’ as a reason to go forward with projects, many people in the public speak to show concern when it is mentioned, it then reflects back on the fishing industry as being a contributor, that we are the bad guys.”*

*“General acceptance and acknowledgment by the public of the fishing industry to be sustainable and a solid contributor to the national economy by producing high quality and trustworthy marine protein.”*

*“Educate the public that fishermen are farming the sea for the benefit of the Australian public stop the misconceptions and lies being generated by the recreational sector about commercial fishing.”*

*“Greater connection and increased positive perception from the broader community for the role industry plays in bringing fresh, local product to their plate.”*

*“For the public to understand that we are actually a value to greater society that we produce a necessary product and that we are a harvester of seafood.”*

### Country of origin labelling on food

*“Food labelling, which requires maturity in the industry, to work together on sustainable seafood production, for the benefit of all (recreational, commercial, indigenous, aquaculture) and to promote ‘Australian’ seafood.”*

*“Everything that is imported to be marked imported. Take the fishing industry out of politics.”*

*“Mandatory country of origin labelling at the point of sale in the food service industry.”*

*“Bring in mandatory labelling at all retail outlets and restaurants.”*

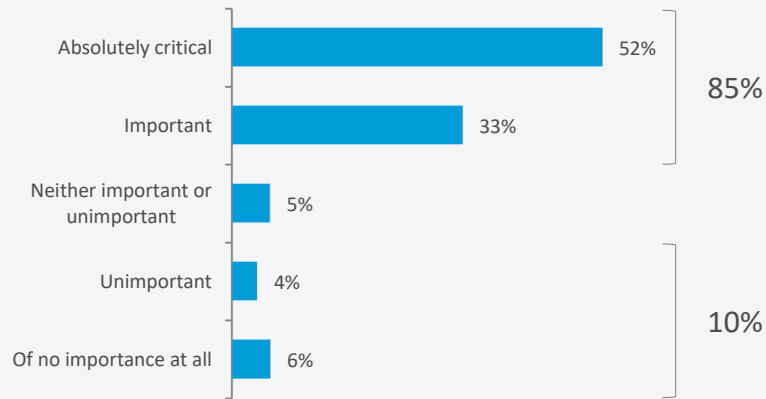
*“Reducing seafood imports and enforcing seafood origin labelling.”*

A full list of responses provided by stakeholders can be found in the Analysis and Verbatim Report.



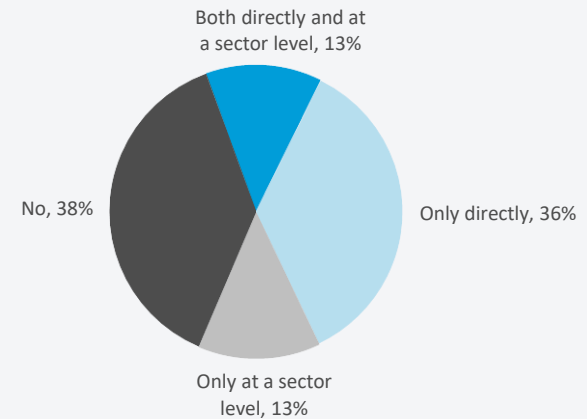
## How important is marketing to your business/sector?

Base: All commercial stakeholders (excluding "Don't know" answers), n = 162.



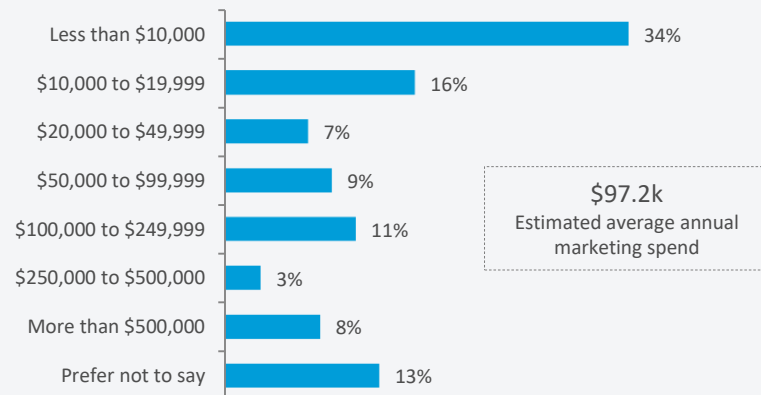
## Does your company currently invest in any marketing?

Base: All commercial stakeholders, n = 163.



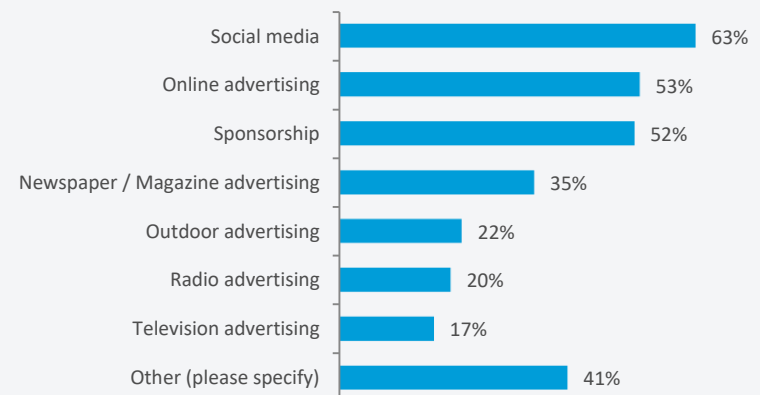
## As a guide only, which of the following categories best reflects your level of commitment to marketing (annual spend)?

Base: All commercial stakeholders who currently invest in marketing, n = 101.



## Over the past twelve months, what marketing activities has your business/sector invested in?

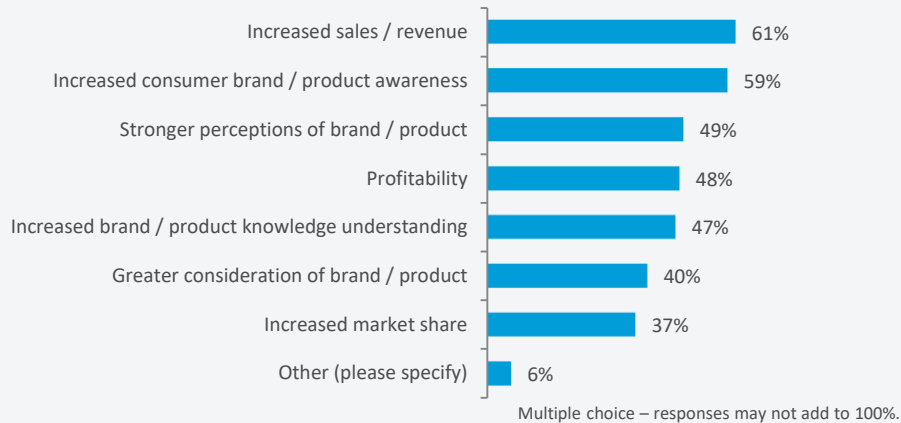
Base: All commercial stakeholders who currently invest in marketing, n = 101.



Multiple choice – responses may not add to 100%.

## How does your business measure success of its marketing investments?

Base: All commercial stakeholders who currently invest in marketing, n = 101.



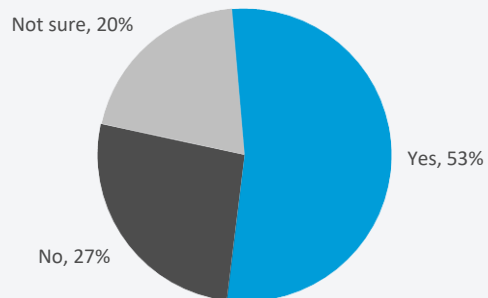
## And which of these measures would you say is your main measure?

Base: All commercial stakeholders who currently invest in marketing, n = 101.



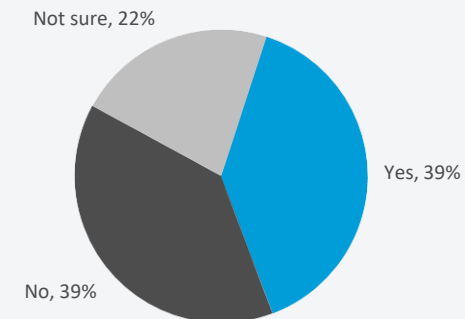
## If FRDC was asked to coordinate a seafood marketing event (such as a trade show) in Australia, would you be interested in participating?

Base: All commercial stakeholders, n = 163.



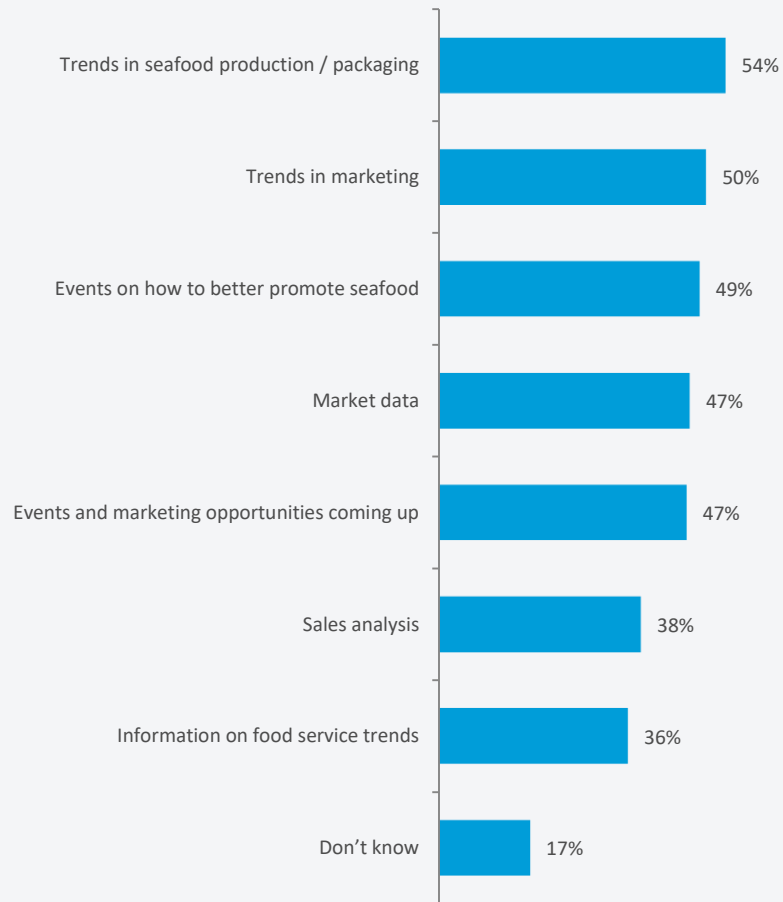
## If FRDC was asked to coordinate a seafood marketing event (such as a trade show) overseas, would you be interested in participating?

Base: All commercial stakeholders, n = 163.



## What market(ing) information would you like to see from the FRDC?

Base: All commercial stakeholders, n = 163.



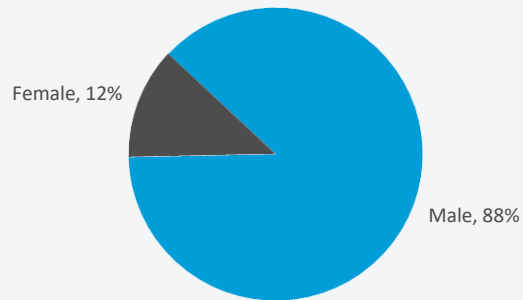
Multiple choice – responses may not add to 100%.



# RESPONDENT PROFILE DATA

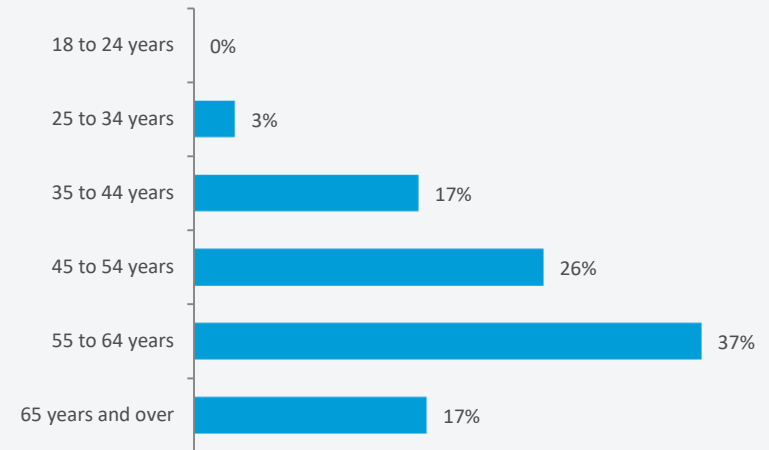
## Are you...

Base: All commercial stakeholders, n = 163.



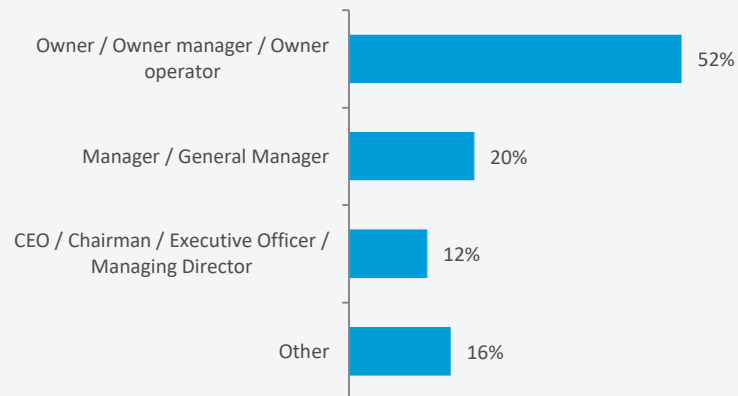
## Which of the following age groups do you belong to?

Base: All commercial stakeholders, n = 163.



## Can you please describe your role within the fishing business you work for (e.g. CEO, general manager, marketing, etc.)?

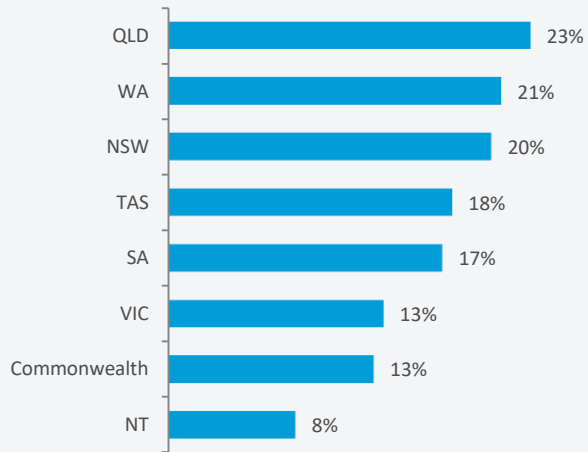
Base: All commercial stakeholders, n = 163.



A full list of roles provided by respondents can be found in the Analysis and Verbatim Report.

## Of the fisheries you work with in your current role, which jurisdictions do these cover?

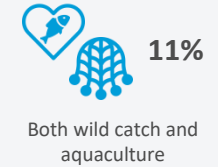
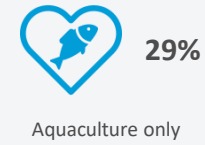
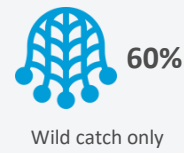
Base: All commercial stakeholders, n = 163.



Multiple choice – responses may not add to 100%.

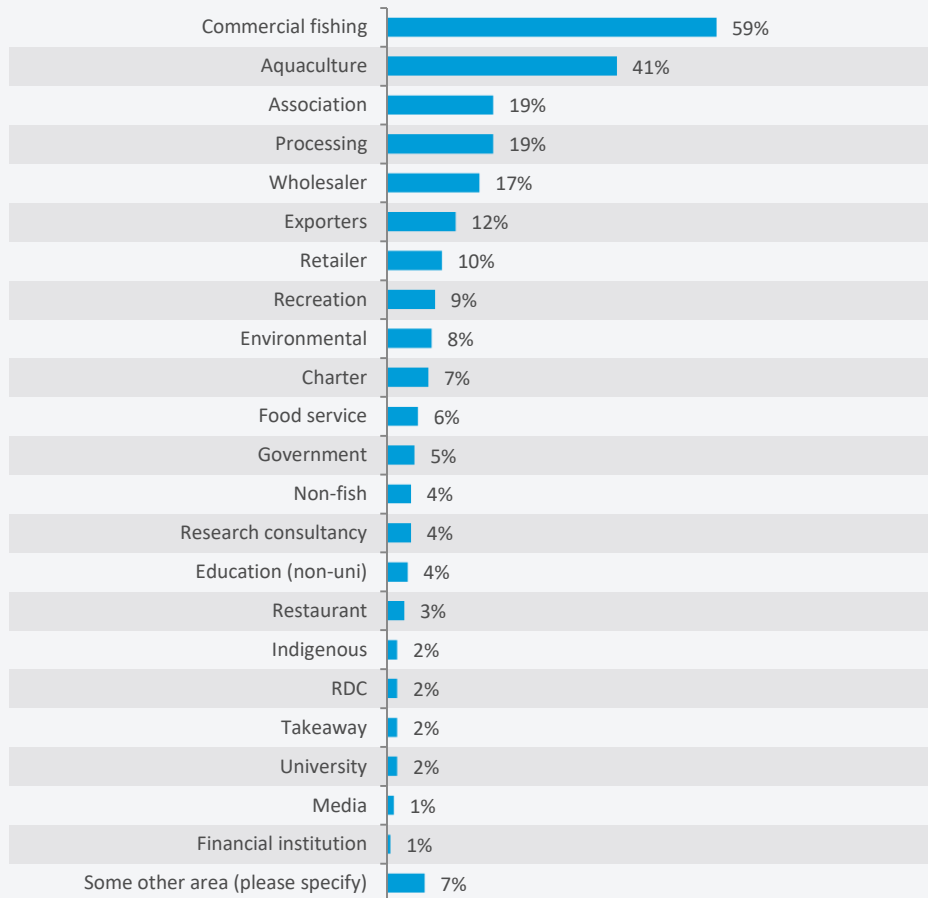
## What sector of the industry do you work in?

Base: All commercial stakeholders who do not work solely with Commonwealth fisheries, n = 160.



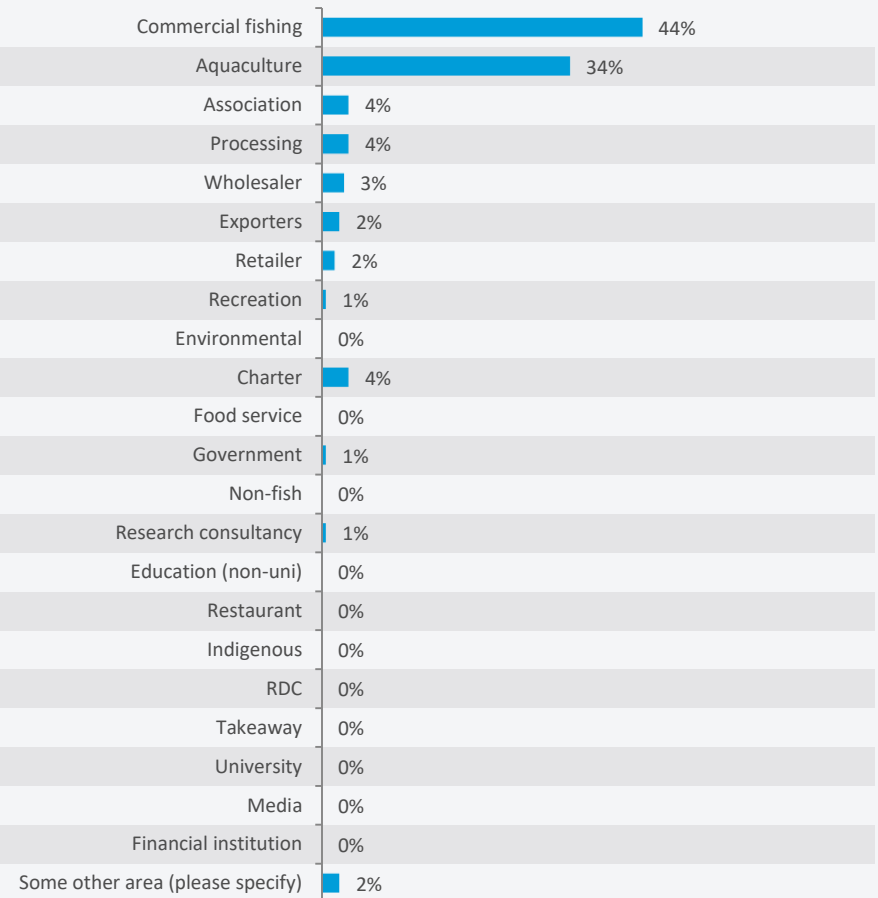
## Which of the following areas of the fishing industry do you operate in?

Base: All commercial stakeholders, n = 163.



## And which of these areas would you say was the main area of the fishing industry you operate in?

Base: All commercial stakeholders, n = 163.



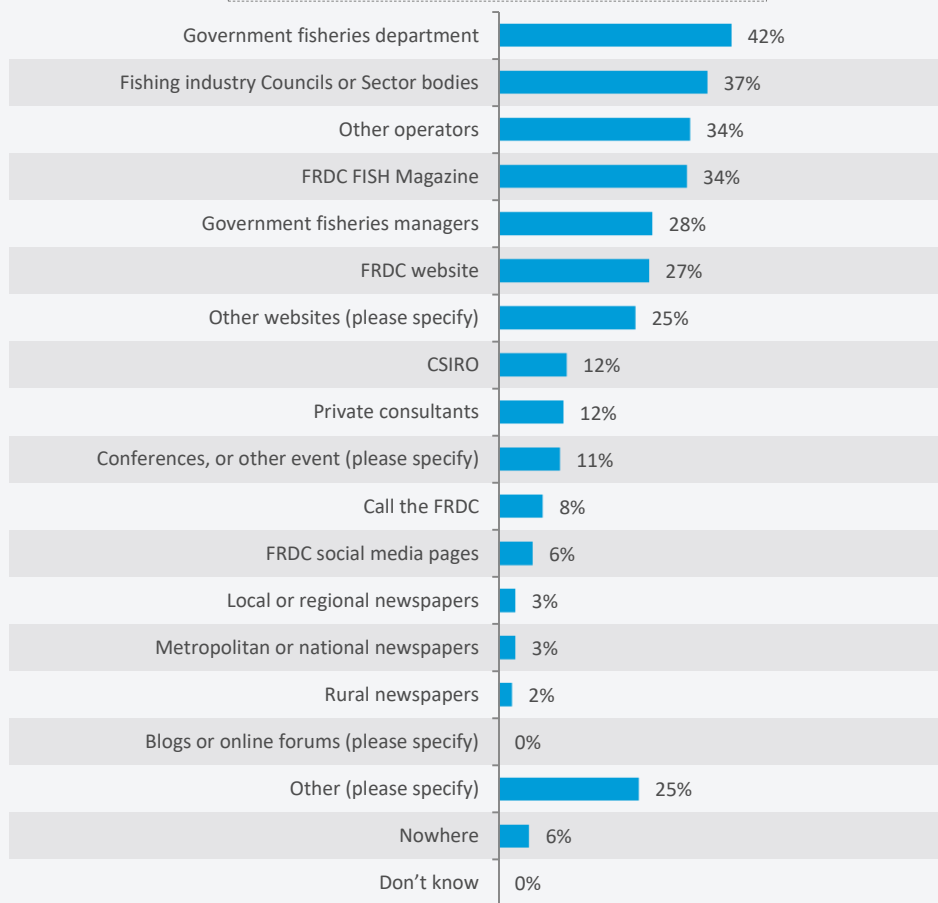
Multiple choice – responses may not add to 100%.

# RESPONDENT PROFILE DATA

Where do you go to find out information on research about the industry or to improve your business?

Base: All commercial stakeholders, n = 163.

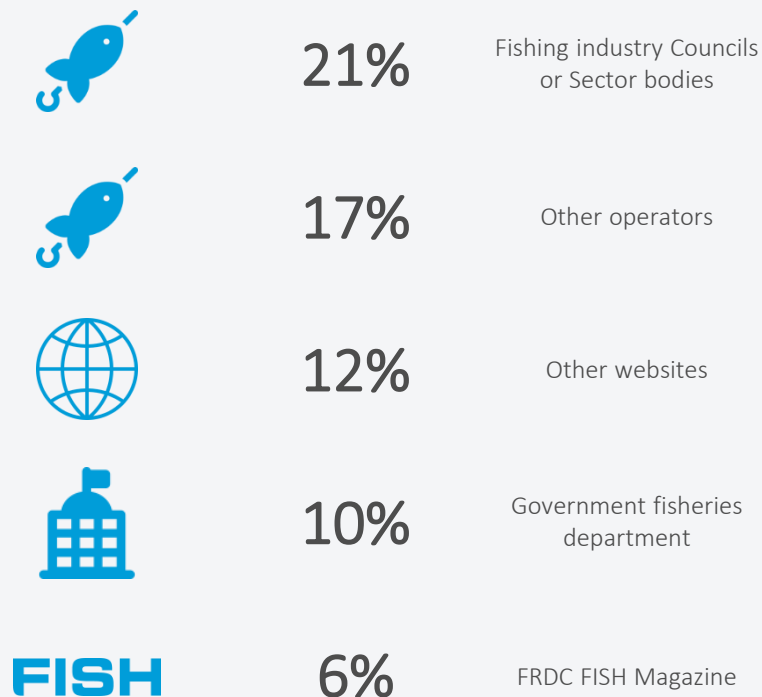
Stakeholders go to 3.1 places on average



Multiple choice – responses may not add to 100%.

And where is the **first place you go** to find out information on research about the industry or to improve your business?

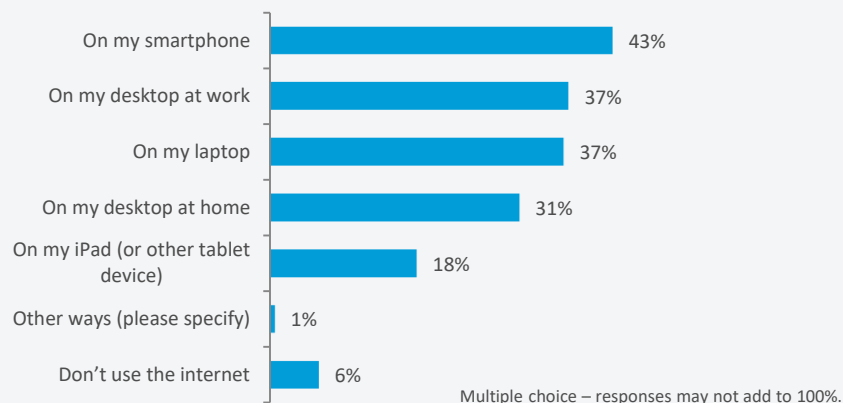
Base: All commercial stakeholders, n = 163.





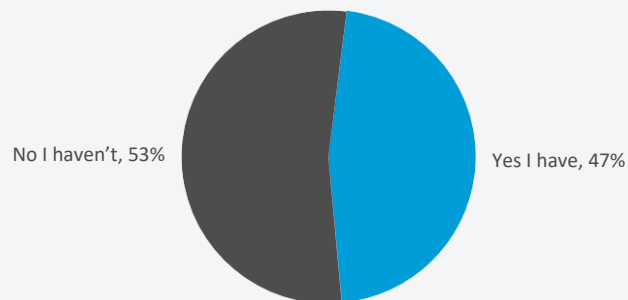
## How do you usually search the internet for information on research about the industry or to improve your business? Do you usually do this on your computer, laptop, tablet or on your smartphone?

Base: All commercial stakeholders, n = 163.



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

Base: All commercial stakeholders, n = 163.



## Where did you find/get this information from?

Base: All commercial stakeholders who used info/findings to make changes in their business, n = 76 (75 comments provided).

- "From my archives of information from Department of Primary Industries information historically collected. From FRDC statistics."*
- "We've partnered with a university and associated with that research we've purchased a licence associated with that research."*
- "Direct from researchers, from research stakeholder groups, from consultants and from other published scientific literature."*
- "Attending TAC setting meeting, industry stakeholder meeting, reading management plan. Discussions with industry colleagues."*
- "Talk amongst the industry and pier you work with and other companies, general website information."*
- "James Cook University on behalf of DAC - how to reduce evaporation rates in aquaculture ponds."*
- "Government fisheries managers and my sector representatives specifically the executive officer."*
- "NT department, FRDC, CSIRO and personal communications with researchers and industry members."*
- "FRDC magazine, then lots of follow up by phone calls and internet researching information."*
- "Our industry asked SARDI and EconSearch to research a theory our industry had."*
- "I use google to find information with the relevant jurisdiction or the FRDC."*
- "Internet and local information relating to tough fish syndrome."*
- "Fisheries scientists, independent fishery scientists, Google."*
- "Directly from the researcher as well as industry body emails."*
- "Discussions with other growers, conferences, newsletters."*
- "Through open discussion meeting and through fisheries"*

A full list of responses provided by stakeholders can be found in the Analysis and Verbatim Report.



# RESEARCH DESIGN

## RESEARCH PROGRAM

The research program was designed to obtain feedback on FRDC and how it engages with stakeholders and the broader industry. This was achieved by surveying the stakeholders of FRDC – both commercial and non-commercial in their roles in the industry – to get the views and the “voice of the stakeholder” directly from the source. This report focuses on the views and voices of the commercial stakeholders.

## QUESTIONNAIRE

A 20 minute online survey was conducted with commercial stakeholders. This survey measured, amongst other things:

- Industry sentiment
- Discovering new research and information
- Awareness and understanding of FRDC
- Engagement with industry
- Overall satisfaction and advocacy of FRDC
- Marketing and FRDC
- Profile data

A range of Likert rating scale, closed and open-ended questions were used throughout the survey to accomplish this.

## DISTRIBUTION

The survey was distributed through FRDC to an internal list of stakeholders defined as being involved in the commercial segment of the industry. This was undertaken using a mixed mode data collection method (combination of online and telephone surveys).

## RESPONSE

Throughout the survey period, n = 163 responded to the research. A breakdown of the response metrics are below:

- Stakeholders contacted: 1,543
- Emails opened: 433 (28.0% of stakeholders)
- Surveys started: 241 (15.6% of stakeholders, 55.7% of opened emails)
- Survey completed: 163 (10.6% of stakeholders, 37.6% of opened emails, 67.6% of surveys started)

## TIMING

The survey was open for response on 29<sup>th</sup> May 2018 and remained open until 6<sup>th</sup> July 2018.



2018 FRDC Stakeholder Tracking  
Commercial Stakeholders  
July 2018

For further information, please contact:



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FRDC



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Intuitive Solutions