



2022 FRDC Stakeholder Research

January 2023

Prepared by:



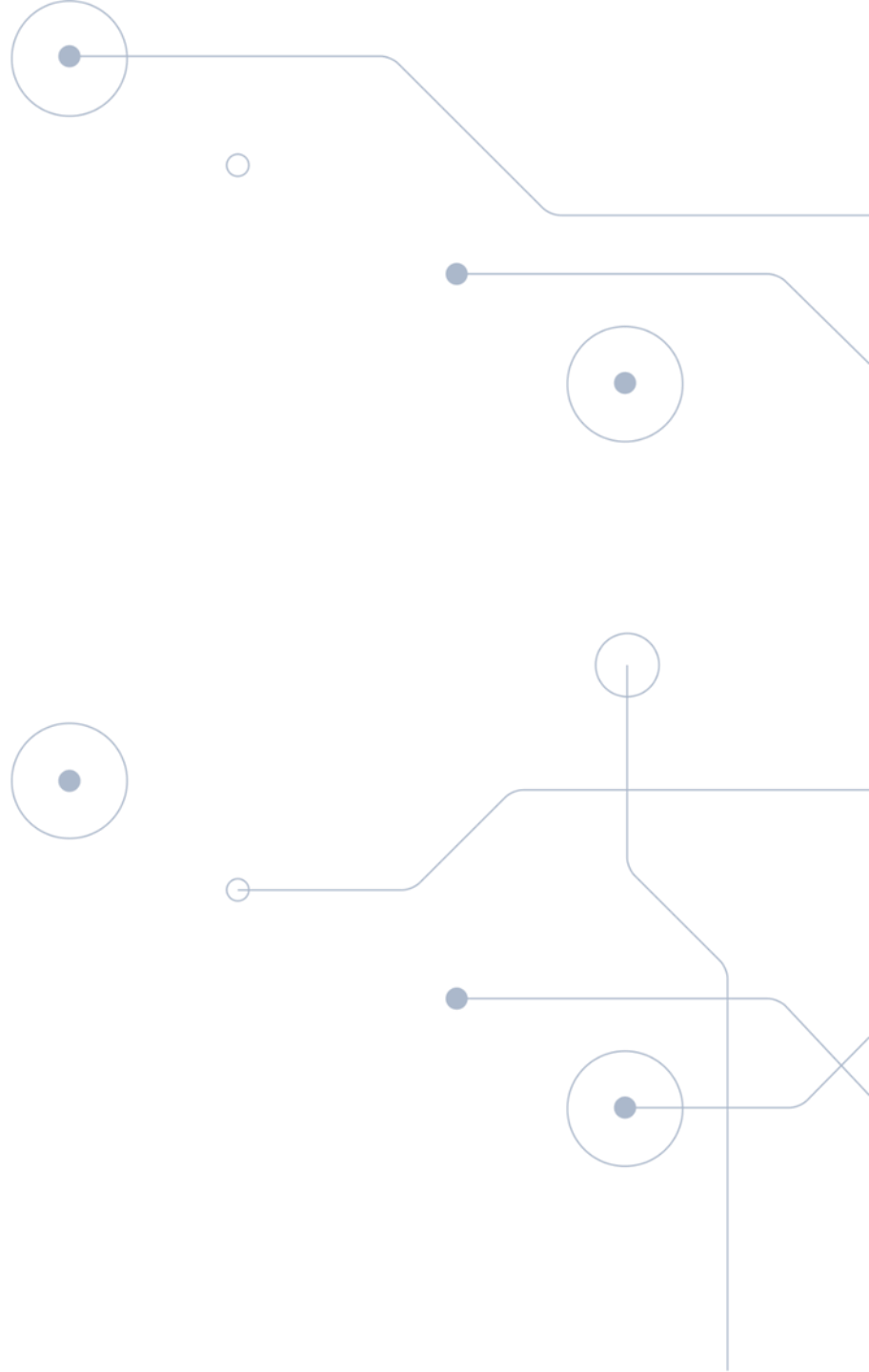
Prepared for:



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Context: the FRDC stakeholder survey



Fisheries Research and Development Corporation's (FRDC) purpose is to assume a leading role in planning and investment in fisheries research and development (R&D) to ensure the ongoing sustainability of Australia's aquatic sectors and aquatic ecosystems.

Co-funded by the Government and the fishing and aquaculture sectors, FRDC plan, invest in and manage R&D for fishing and aquaculture and the wider community.

FRDC's vision (articulated opposite) will be supported by outcomes achieved across five strategic areas. These areas are the backbone of the 2020-2025 Strategic Plan and include:

1. Growth for enduring prosperity;
2. Best practices and production systems;
3. A culture that is inclusive and forward thinking - a community of fishing and aquaculture that is cooperative, diverse and well equipped to enable growth and adaptability in a complex and uncertain world;
4. Fair and secure access to aquatic resources;
5. Community trust, respect and value - people justifiably feel good about using the products, services and experiences provided by Australia's fishing and aquaculture community.

These targeted outcomes are focusing on big, cross-sectoral issues of national importance as well as jurisdictional and sector needs.

Given the diverse stakeholder audiences across fishing and aquaculture, this is an ambitious plan.

FRDC has acknowledged that achieving these five strategic outcomes will not be possible without the engagement and support of its partners and stakeholders.

This discussion further highlights the criticality of ensuing FRDC's stakeholders are 'front and centre' on the efforts to roll out initiatives to achieve the targeted strategic outcomes. A strong and mature relationship between FRDC and its stakeholders, which acknowledges FRDC's goals but at the same time the operating pressures stakeholders confront, will be critical.

A program of research is then required to measure and report on the health and strength of these stakeholder relationships.



There are four broad stakeholder audiences for FRDC (as shown opposite):

✓ FRDC’s organisational partners

There are several different organisational partners FRDC collaborates with and replies upon. This includes Federal, State and Territory governments, the relevant departments, and fisheries and national resource managers.

✓ FRDC’s research community

R&D is only possible through investment in research. The research is supported and driven by FRDC’s research community – this includes researchers from universities, government fisheries organisations, further education organisations (e.g. TAFE), international research organisations and private-sector research providers.

✓ The industry

Arguably the most critical stakeholder audience is industry – those stakeholders across four main sectors of fishing (aquaculture, commercial wild catch, Indigenous and recreational), plus supply chain partners (exporters/importers, processors). Stakeholders may cross over sectors - for example, Indigenous fishers may participate in customary fishing, conduct aquaculture and commercial fishing, and fish recreationally.

✓ The Australian community

The last stakeholder audience is the Australian community. They are the ‘owners’ of the resources the industry uses to create and sustain Australia’s fishing and aquaculture sectors. This also includes an important cohort of seafood consumers.

These four audiences are the key focus of the FRDC Stakeholder Survey.

The FRDC stakeholder audience map



How often will this research be undertaken?

FRDC have identified that the stakeholder survey will be conducted annually over the next 3 years (2022 to 2025) to reflect the roll out of the agreed FRDC Strategic Plan.

The 2022 survey represents the first survey of stakeholders under the new Strategic Plan.

Where did the audience segments come from?

The key stakeholder audience segments were identified and articulated in the FRDC Strategic Plan. The research reflects these articulated stakeholder cohorts.

What was the design for the research?

A full explanation of the research design has been provided in the Attachments to this report.

In short, the survey was a hybrid online and telephone survey of selected stakeholders across each of the four stakeholder segments. This provided the most cost-efficient solution to reach these stakeholders.

Who designed the questions that were included in the survey?

Development of the survey questionnaire was a co-design process involving FRDC, FRDC's Human Dimensions coordinating program (HDR) and Intuitive Solutions.

Questions were included to measure the key KPI reporting metrics along with other diagnostic information about stakeholder experiences with FRDC.

Where did the list of stakeholders come from for the survey?

The list of stakeholders was provided by FRDC. The list was sourced from the FRDC CRM system and provides the most up-to-date list of stakeholders who have had at least some engagement with FRDC. We do note that by its nature, this list is not necessarily a comprehensive list of all FRDC stakeholders as it does not include details for stakeholders who have had no contact with FRDC.

There is some cross-over in the fishing and aquaculture cohorts

While in most audience segments respondents were classified into a single segment, for the fishing and aquaculture audience segment there was some cross-over – commercial fishers were in a small number of cases also involved in aquaculture, some indigenous fishers also self-identified as commercial fishers etc.

An explanation of the small amount of cross-over is detailed in the research design.

Were the survey results weighted?

Details of the weighting for the survey is provided in the research design section of this report.

In short, only the fishing and aquaculture cohorts were weighted to provide an aggregated results for these two stakeholder cohorts. All remaining cohorts were unweighted.

The survey accumulated a significant volume of feedback

The 2022 Stakeholder Survey collected a large volume of feedback from the included stakeholder groups. It was not possible to present every result by every audience segment and sub-group within this report. The results presented in this report are then a selective representation of the main result, predominantly for the larger stakeholder audiences.

More detailed presentation of results broken down by a range of other sub-groups has been provided to FRDC in a separate analysis workbook.

What results are presented in the report?

This report includes feedback from the Partner, Research Community and Fishing and Aquaculture stakeholder audiences. That said, we would note that for this report, results have been provided for:

- Firstly, results from Research Community and Partner stakeholders. Results for these two audience segments have not been broken down into any sub-groups but provided at an overall level. We would note the results for these two audience segments are unweighted.
- Along with these results, aggregated results for Fishing and Aquaculture (only including feedback from commercial wild catch and aquaculture stakeholders) have been presented. We would note that, based on the advice from FRDC's Human Dimensions coordinating program, the results for these two sub-groups were weighted 50:50 to produce an overall F&A result.
- It is important to note that for a range of the key metrics, these detailed results were supplemented with results for the various F&A sub-groups namely: wild catch only, aquaculture only, indigenous, recreational fishers and the processors, wholesalers and retailer stakeholders. These results are presented unweighted.

Feedback from the Community stakeholder audience will be provided in a separate report.



Headline results







2022 Stakeholder Survey Results

Indicator (as per Monitoring and Evaluation Framework)	Survey measure	Target	Fishing and Aquaculture	Partners	Research Community	
KPI 1	Stakeholders report that they value FRDC services highly	Proportion of stakeholders that are “satisfied” or “very satisfied” with FRDC services <i>(Q12 - does not include “Don’t use” or “Not aware” answers)</i>	70%	55%	73%	58%
KPI 2	Stakeholders report that they value FRDC highly	Proportion of stakeholders that are “satisfied” or “very satisfied” with FRDC <i>(Q24)</i>	70%	37%	55%	56%
KPI 3	Stakeholders report that they value FRDC extension and adoption	Proportion of stakeholders that have gained new knowledge or info from extension and adoption programs, and intend to (or have) made changes in existing practices by adopting outcomes <i>(Q14 – of those who have participated in R&D events in the last 12 months, reported at least one active or passive outcome)</i>	50%	86%	96%	79%
KPI 4	Of levy payers who participate in RDC supported extension and adoption programs: -the majority (over half) intend to make or have made changes to existing practices by adopting the outcomes of R&D (2.1 from Guidelines for SFAs KPIs)	Impactful proportion of stakeholders embracing/adopting R&D <i>(Q27 – of those who have participated in R&D events in the last 12 months, reported to have made changes, have plans to, or intend to)</i>	50%	66%	83%	76%
KPI 5	Transparent communication to stakeholders (including government) on the impacts and benefits of the RD&E (and marketing) activities (5.3 from Guidelines for SFAs KPIs)	Proportion of stakeholders who “agree” or “strongly agree” that FRDC is transparent in how it communicated the impacts of R&D it has supported <i>(Q23)</i>	No target	47%	61%	62%


Stakeholder Snapshot: Fishing and Aquaculture

Sample size: n = 257



Key metrics

	37%	% satisfied that financial contributions to FRDC are being invested wisely and benefit the fishing and aquaculture sectors and the Aus community
	-29	Net Promoter Score
	47%	% agree that FRDC is transparent in how it communicates the impacts of R&D it has supported
	38%	Intend to or have made changes to practices because of outcomes from FRDC info, services or R&D projects over the last 3 years

Industry sentiment

	+25	NETT Sentiment of the future of Aus fishing / aquaculture industry over the next 12 months (scale of -100 to +100)
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FRDC roles and responsibilities

	57%	% who understand very well or fairly well what FRDC's roles and responsibilities are
	39%	% who recall all four FRDC responsibilities and roles (when prompted with a list)

FRDC mechanisms and outcomes

Interaction with FRDC mechanism	Did this	Reported an outcome *
Used at least one FRDC service	50%	74%
Involved in at least one activity	27%	72%
Participated in at least one R&D event	33%	86%
Interacted with the Extension Officers	17%	59%
Looked at FRDC social media	31%	69%

Statements about FRDC





	% agree	
FRDC places a strong emphasis on fishing and aquaculture sustainability	74%	
FRDC places a strong emphasis on addressing the environmental issues facing fishing and aquaculture	66%	
You/your organisation value(s) the services offered by FRDC	59%	
FRDC places an emphasis on diversity and inclusion for fishing and aquaculture	55%	
FRDC's engagement with you/your organisation is appropriate	54%	
FRDC places a strong emphasis on the development of people	53%	

*Reported an outcome: Interaction with the FRDC mechanism led to one or more of the following outcomes: adoption of R&D, an increase in your knowledge on a particular issue, facilitated new thinking or ideas on a particular issue, lead to you communicating R&D to others, lead to you being connected to other potential partners.


Stakeholder Snapshot: Partners

Sample size: n = 94



Key metrics

	55%	% satisfied that financial contributions to FRDC are being invested wisely and benefit the fishing and aquaculture sectors and the Aus community
	-4	Net Promoter Score
	61%	% agree that FRDC is transparent in how it communicates the impacts of R&D it has supported
	67%	Intend to or have incorporated any of FRDC's R&D outputs over the last 3 years

Industry sentiment

	+50	NETT Sentiment of the future of Aus fishing / aquaculture industry over the next 12 months (scale of -100 to +100)
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FRDC roles and responsibilities

	85%	% who understand very well or fairly well what FRDC's roles and responsibilities are
	30%	% who recall all four FRDC responsibilities and roles (when prompted with a list)

FRDC mechanisms and outcomes

Interaction with FRDC mechanism	Did this	Reported an outcome *
Used at least one FRDC service	78%	89%
Involved in at least one activity	46%	93%
Participated in at least one R&D event	51%	96%
Interacted with the Extension Officers	40%	68%
Looked at FRDC social media	38%	92%

Statements about FRDC





	% agree	
FRDC places a strong emphasis on fishing and aquaculture sustainability	86%	
You/your organisation value(s) the services offered by FRDC	84%	
FRDC's engagement with you/your organisation is appropriate	67%	
FRDC places a strong emphasis on addressing the environmental issues facing fishing and aquaculture	66%	
FRDC places an emphasis on diversity and inclusion for fishing and aquaculture	66%	
FRDC places a strong emphasis on the development of people	63%	

*Reported an outcome: Interaction with the FRDC mechanism led to one or more of the following outcomes: adoption of R&D, an increase in your knowledge on a particular issue, facilitated new thinking or ideas on a particular issue, lead to you communicating R&D to others, lead to you being connected to other potential partners.

Stakeholder Snapshot: Research Community

Sample size: n = 82


Key metrics

	56%	% satisfied that financial contributions to FRDC are being invested wisely and benefit the fishing and aquaculture sectors and the Aus community
	+19	Net Promoter Score
	62%	% agree that FRDC is transparent in how it communicates the impacts of R&D it has supported
	55%	Intend to or have incorporated any of FRDC's R&D outputs over the last 3 years







FRDC mechanisms and outcomes

Interaction with FRDC mechanism	Did this	Reported an outcome *
Used at least one FRDC service	72%	85%
Involved in at least one activity	30%	84%
Participated in at least one R&D event	40%	79%
Interacted with the Extension Officers	10%	75%
Looked at FRDC social media	35%	72%



Industry sentiment

	+55	NETT Sentiment of the future of Aus fishing / aquaculture industry over the next 12 months (scale of -100 to +100)
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Statements about FRDC

	% agree	
FRDC places a strong emphasis on fishing and aquaculture sustainability	88%	
You/your organisation value(s) the services offered by FRDC	80%	
FRDC places a strong emphasis on addressing the environmental issues facing fishing and aquaculture	74%	
FRDC's engagement with you/your organisation is appropriate	71%	
FRDC places a strong emphasis on the development of people	68%	
FRDC places an emphasis on diversity and inclusion for fishing and aquaculture	65%	

FRDC roles and responsibilities

	79%	% who understand very well or fairly well what FRDC's roles and responsibilities are
	28%	% who recall all four FRDC responsibilities and roles (when prompted with a list)

*Reported an outcome: Interaction with the FRDC mechanism led to one or more of the following outcomes: adoption of R&D, an increase in your knowledge on a particular issue, facilitated new thinking or ideas on a particular issue, lead to you communicating R&D to others, lead to you being connected to other potential partners.



Observations & insights



A summary of some of the key insights from the revised 2022 FRDC Stakeholder Survey now follow.

As discussed above, results presented in this summary and across the report are provided for three of the four agreed FRDC stakeholder audiences, namely:

1. Fishing and Aquaculture businesses (a equal-weighted mix of stakeholders from these two cohorts, but excluding other sub-groups such as indigenous, recreational fishers and supply chain businesses);
2. Unweighted results from FRDC Partners; and
3. Unweighted results from FRDC's Research Community.

Detailed results for all sub-groups who responded to the survey are provided in a separate analysis report.

Context

The Stakeholder Survey underwent a significant redesign for the 2022 survey. Caution should be exercised in comparing the results with previous surveys.

The survey was undertaken in November 2022, a period where the industry was still managing the impacts of COVID-19, trade restrictions, increased input and processing costs and a volatile global market. The domestic market remains under cost-of-living pressures and high levels of inflation making trading and operating conditions challenging.

Stakeholder's outlook

There is cautious optimism about the future of the fishing and aquaculture industry:

- ✓ More stakeholders indicated they were positive than negative about the future.
- ✓ NETT sentiment (% positive – % negative) of +25 (fishing and aquaculture businesses), +50 (Partners) and +55 (Research Community stakeholders).

Despite the challenging conditions, the majority of stakeholders report a positive outlook for the immediate future.



*NETT Sentiment
(refer page 21)*

+25	Fishing and Aquaculture
+50	Partners
+55	Research Community

Challenges in managing stakeholder perceptions of what FRDC is and is not responsible for?

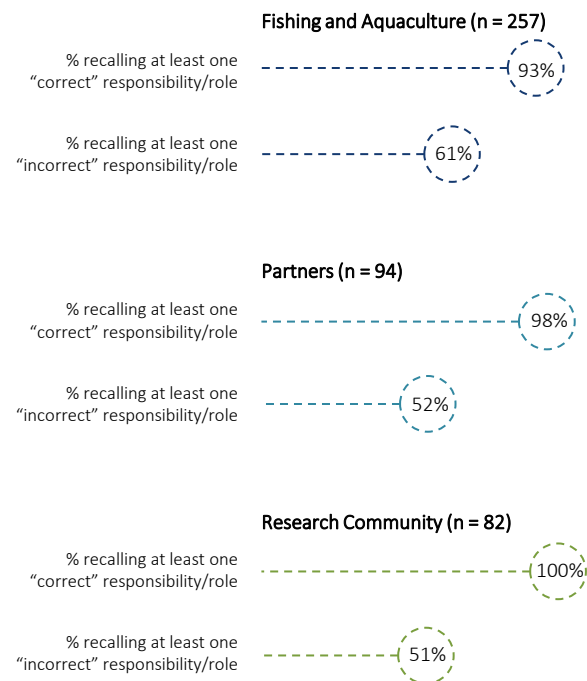
One of the challenges facing most RDCs is in ensuring there is a clear understanding of the role and responsibilities of the RDC. For FRDC this is particularly amplified as a result of the wide remit of responsibilities and the varied stakeholder audiences it supports and manages.

The results from the 2022 survey underscore the challenge for FRDC. For example, among F&A stakeholders, most (93%) correctly identified at least one of the actual responsibilities, but a large proportion (61%) also identified a responsibility outside of FRDC's remit. Of note is that 40% reported fisheries management was an FRDC responsibility.

This pattern of 'sheeting back' industry roles to the RDC is consistent across many of the RDCs Intuitive works with. This creates unrealistic expectations for some stakeholders and perhaps an inevitability that satisfaction with FRDC may be adversely impacted. Analysis of the 2022 survey data was unable to quantify this impact but some comments provided in the survey link these incorrect assumptions of FRDC's responsibilities to dissatisfaction.

There is a challenge moving forward to better inform and define the actual role and responsibility of FRDC to as many stakeholders as possible.

What does FRDC have responsibility for or play a role in? (8 roles provided, refer page 26)



Challenges with Fishing and Aquaculture stakeholders

Perhaps not surprisingly, results for the Fishing and Aquaculture stakeholders are consistently lower than the other two stakeholder audiences (Partners and Research Community). As shown opposite, the proportion of stakeholders rating very satisfied or satisfied was high among Partners (55%) and Research Community stakeholders (56%), but lower among Fishing and Aquaculture stakeholders (36%). Among this cohort, we note that:

- Slightly fewer than one in ten (8%) reported being very satisfied, with a further 28% satisfied
- A large proportion (44%) were ambivalent rating neutral, whilst
- 20% reported being dissatisfied (12% dissatisfied and 8% very dissatisfied)

Across all RDCs, we note there is a consistent sub-group of industry stakeholders who report as being dissatisfied. The majority appear to reject the concept of paying levies or the need for an industry service body. We do note commercial wild catch stakeholders are over-represented in this sub-group. Shifting their perceptions will be difficult.

For FRDC, there is a large sub group who are ambivalent (44%). Experience suggests that this is likely an outcome of lower understanding and knowledge of what FRDC does and provides, a lower level of engagement and lower uptake of R&D outcomes to improve business profitability.

There should be some optimism that shifting perceptions is possible as this large sub-group rated neutral and not dissatisfied. This suggests there should be opportunities to convert them to satisfied stakeholders if there is an uplift in their engagement and involvement. However, getting to this will be a longer term objective and require consistent attention, focus and investment. They should be the priority for FRDC to ‘move the satisfaction needle’.

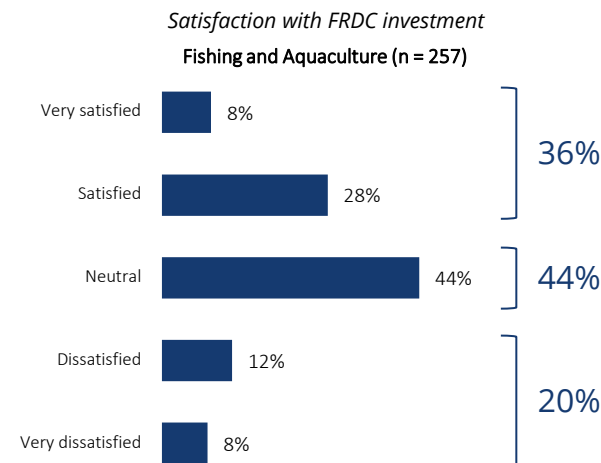
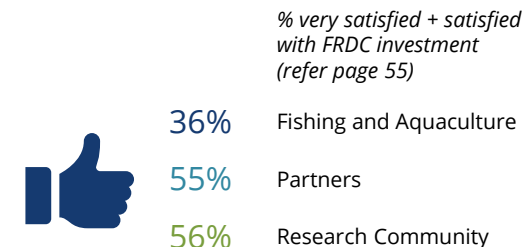
Our analysis of the Fishing and Aquaculture stakeholders does illustrate that, in general:

- They are less aware of the services FRDC makes available;
- Are less likely to use the services and resources FRDC offers;
- Are somewhat less likely to consumer social media content;
- Are, at this point, unlikely to have engaged with the EON; and arguably as a result
- Report being less satisfied with FRDC and less likely to be a ‘promoter’ of FRDC.

Given the complexities of their businesses and the current trading and operating environment, achieving ‘cut through’ for FRDC is and will remain challenging.

While the ‘long game’ (that is achieving continual improvement over time in key measures) should remain a focus for FRDC, consideration about how to present the services and resources to this important stakeholder audience, in the context of the challenges they face today, warrants some consideration. It may require a curation of the benefits to ‘talk to’ the issues these businesses are currently facing.

That said, there remains ample ‘upside’ opportunities for FRDC to continue to strengthen and deepen its engagement across all stakeholder audiences.



Observations from the feedback

The analysis indicates a clear correlation between stakeholder satisfaction and their engagement and involvement with FRDC – through the services offered, events and training opportunities, communications and information provision. We would note:

- Creating and extending stakeholder awareness is a fundamental first step in creating a solid engagement platform. If stakeholders aren't aware of what FRDC provides and offers, there is little opportunity to have the benefits of these services translate to improving their satisfaction.

From the results presented across the report, there remains a challenge for FRDC to continue to expand stakeholders' awareness of the services and offers that are available. Caution should be exercised in how FRDC goes about increasing awareness – simply flooding stakeholders with more information is unlikely to deliver the improvements hoped for. Careful curation of communications and promotion of the breadth of services and support FRDC provides should be considered. This is particularly relevant for Fishing and Aquaculture stakeholders.

- While creating awareness is a fundamental first step, FRDC's focus in ensuring uptake and usage of the services and offers should also remain a priority. The analysis shows a clear satisfaction dividend when stakeholders make use of the services and resources FRDC offers.

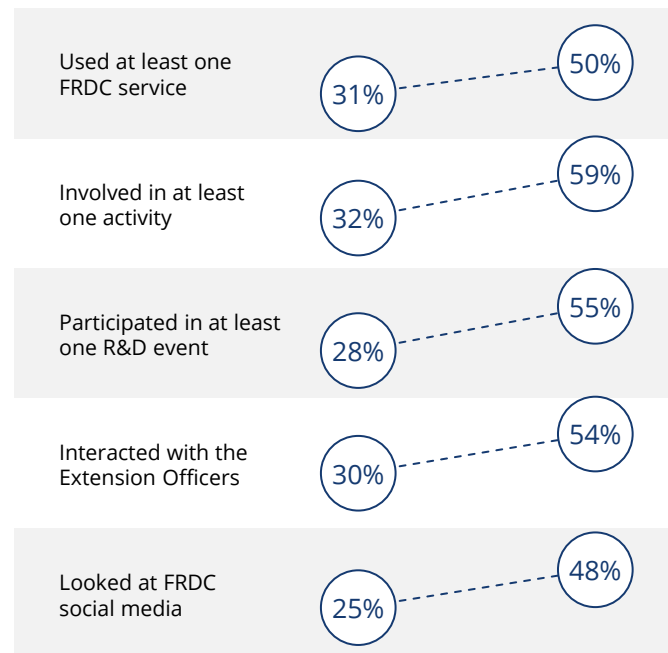
FRDC may need to reflect on the current incentives and processes that encourage uptake. While current processes have achieved some success, doing more of the same may not translate to the increases in usage anticipated.

- Some encouragement can be taken from the reported 'impact' stakeholders report from use of these services and resources. Based on the feedback provided, most stakeholders report at least some positive impact. While the 'end game' may be about behavioural and practice change, the results show more passive impacts are being reported.

Careful focus on these impact measures over time will be necessary. As FRDC looks to expand awareness and use of its services and resources, it is equally important to ensure this use translates to a positive impact.

Fishing and Aquaculture (n = 257)
Result: % very satisfied + satisfied with FRDC investment (refer page 55)

Did not do this Did this



Quick take outs . . .

- ✓ Involvement in FRDC's capability activities and extension events remains low.

Reflecting on how to attract stakeholders to get involved in these events is required. Factors likely to impact include when and where the events are presented, who presents, the content and the answer to 'what's in it for me'.

- ✓ There is a varied level of understanding of FRDC's role and responsibilities.

Explaining what FRDC does NOT do as well as what its responsibilities are may be an alternate communications path to take.

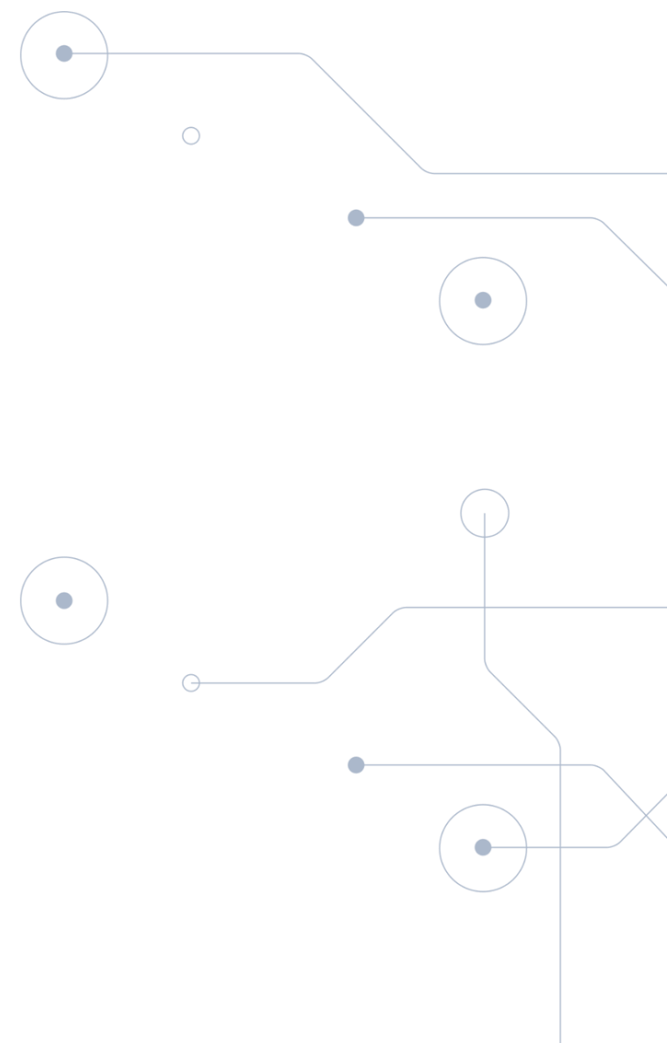
- ✓ Analysis suggests that there is a small cohort of stakeholders who are highly engaged – they know what FRDC is responsible for, is aware and use FRDC services, are involved in extension and use information from FRDC.

Sustaining these relationships is vital, but there is an equally challenging task in 'reaching out' to those less engaged to better inform and involve these less engaged stakeholders. The dividend from success with this larger cohort will translate to stronger results on most metrics.

- ✓ While early days, signals around the awareness and perceived value of the EON is encouraging.

The challenge will be to sustain and build this value as more stakeholders become aware and have the opportunity to interact with the extension officers.

The detailed results from the 2022 FRDC Stakeholder Survey now follow.



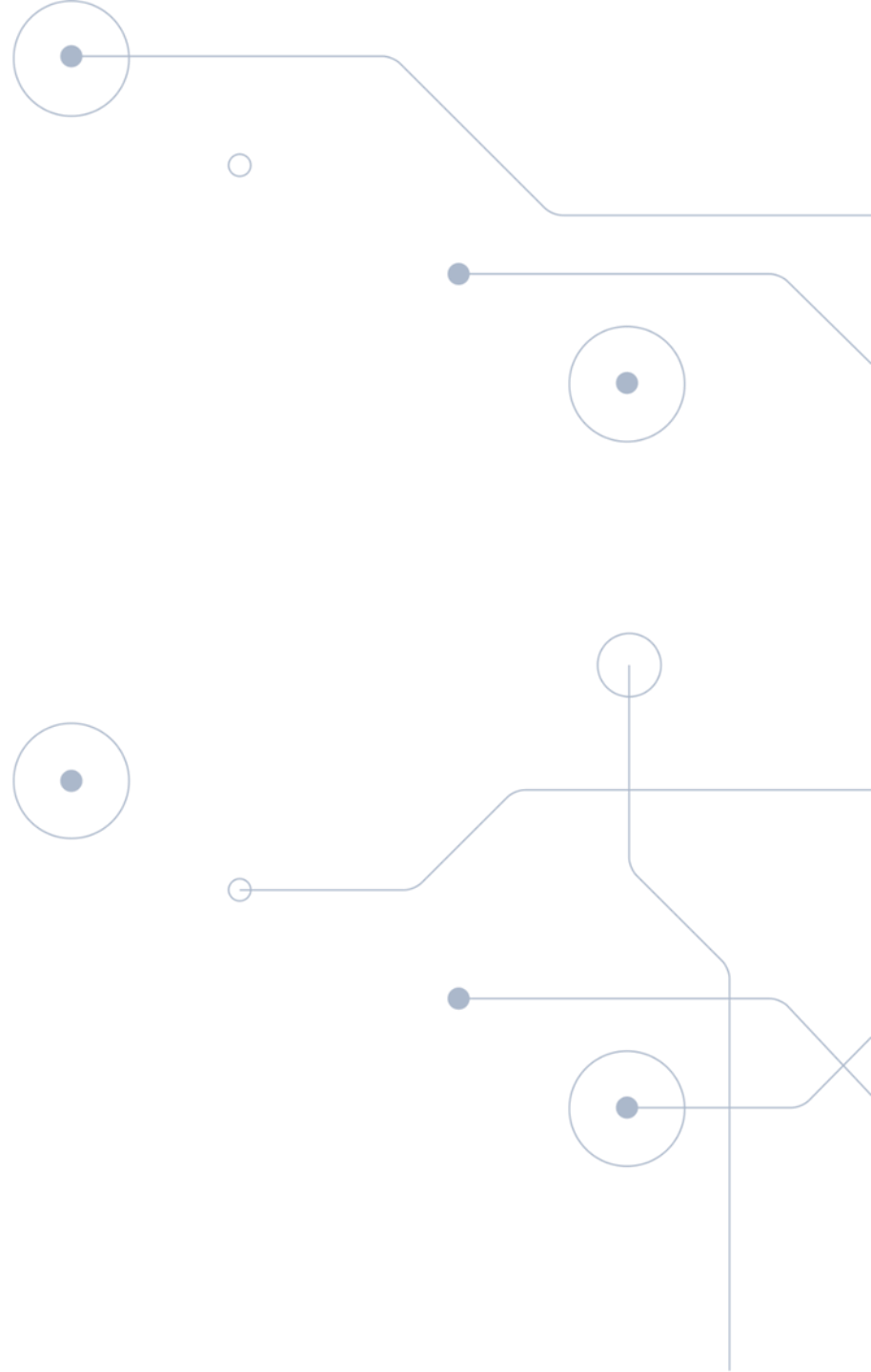


Detailed results

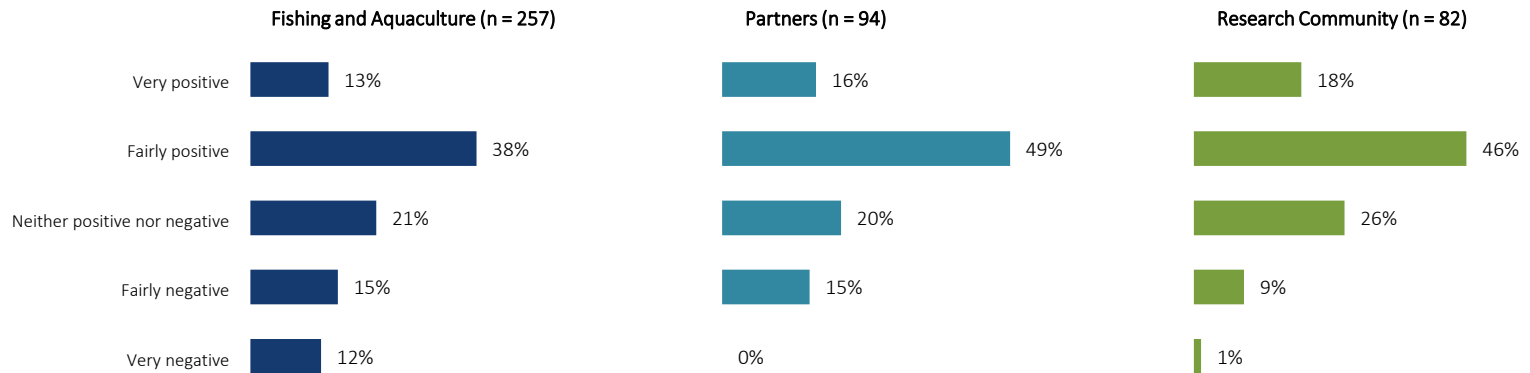




Stakeholder sentiment



How do you feel about the future of Australian fishing and aquaculture over the next 12 months? Would you say you feel...
 Asked to all respondents.



Total positive	52%	65%	65%
Total negative	27%	15%	10%
NETT Sentiment*	+25	+50	+55

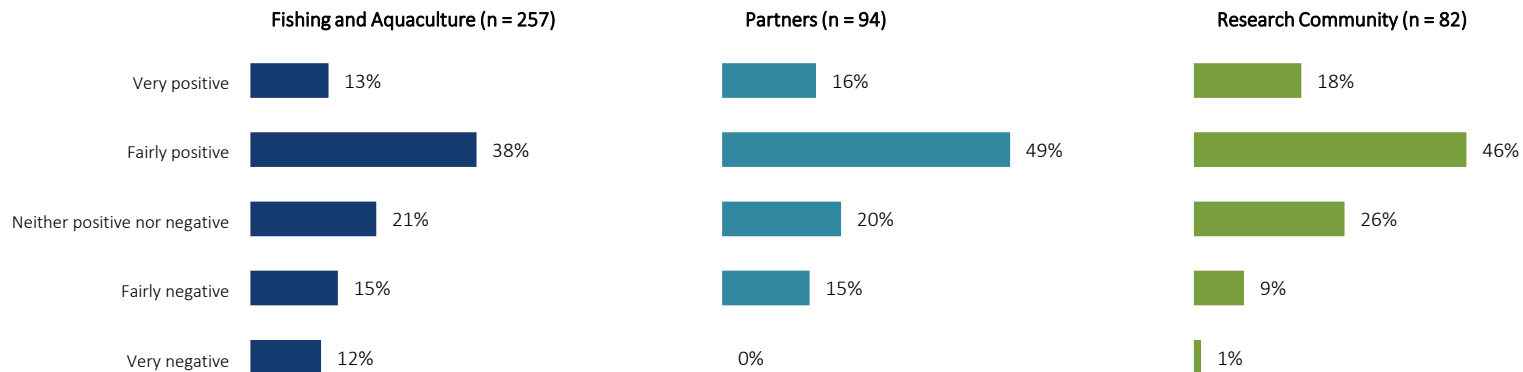
Results across Fishing and Aquaculture sub-groups:

The table below provides results for the five different Fishing and Aquaculture industry sub-groups. Note the results above are weighted while the results in the table below are unweighted. Please also note that a small number of respondents reported participating in more than one of these sub-groups, so there is some limited cross-over between a small number of survey respondents.

Segments of Fishing & Aquaculture	Aquaculture (n = 102)	Commercial Wild Catch (n = 177)	Supply Chain (n = 68)	Indigenous (n = 20)	Recreational Fishers (n = 114)
Total positive	67%	38%	47%	50%	54%
Total negative	14%	38%	31%	20%	24%
NETT Sentiment	+53	-1	+16	+30	+30

*NETT Sentiment is the difference between the proportion of positive sentiment responses and negative sentiment responses.
 NETT Sentiment scores are measured with a single question and reported with a number from -100 to +100, where a higher score is desirable.

How do you feel about the future of Australian fishing and aquaculture over the next 12 months? Would you say you feel...
 Asked to all respondents.



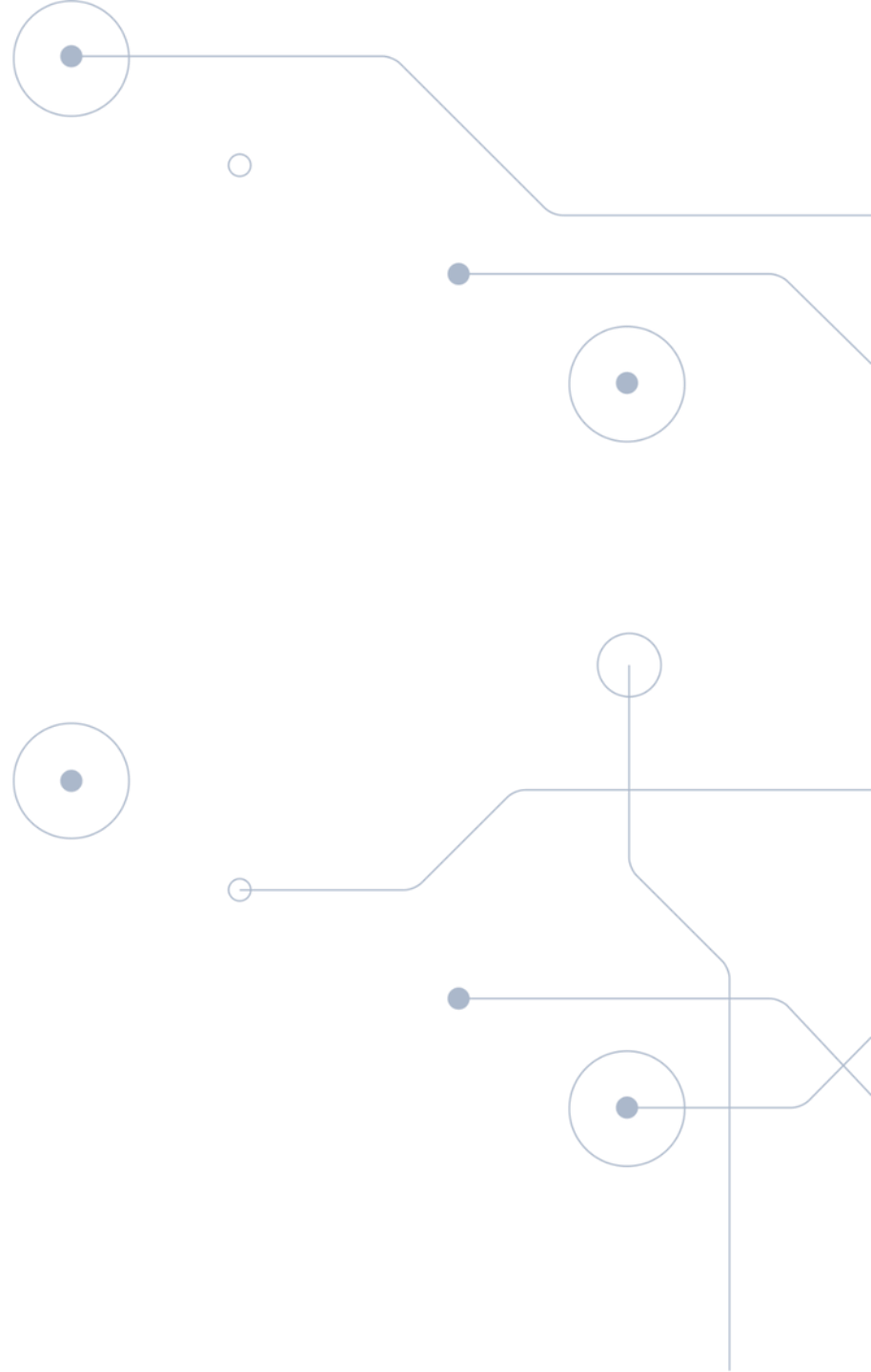
Total positive	52%	65%	65%
Total negative	27%	15%	10%
NETT Sentiment*	+25	+50	+55

Results from 2020 and 2018*: 2020 Active Businesses – NETT Sentiment: +34 2018 Commercial Fishers – NETT Sentiment: +38

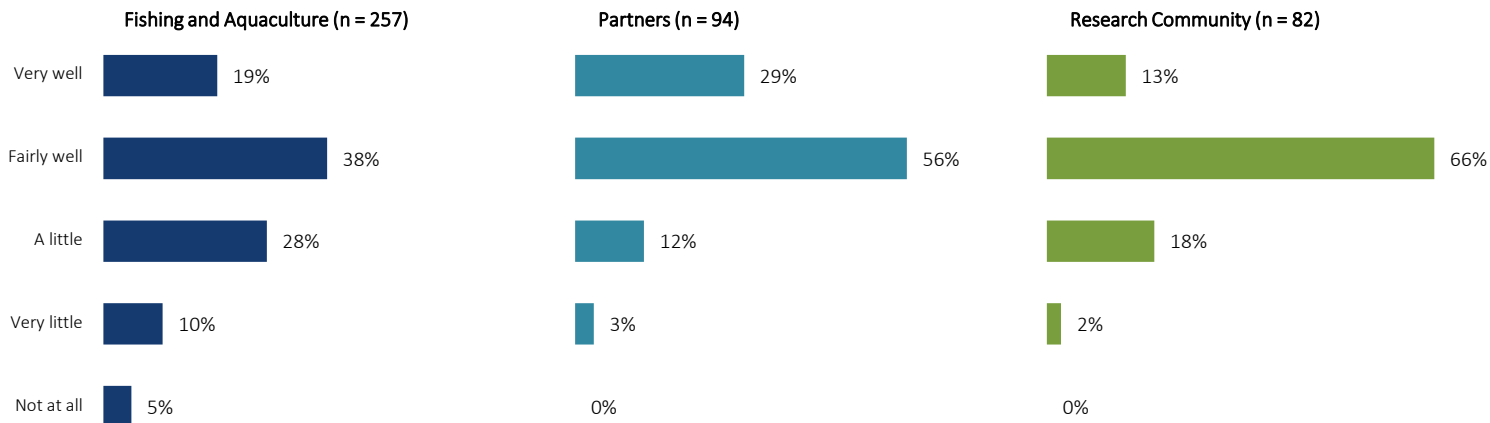
* Question asked: 2020: “Overall, how do you feel about the future of the Australian fishing and aquaculture industry? Would you say you feel...?”.
 2018: “How would you describe your feelings about the future of the fishing and aquaculture in Australia over the next 12 months? Would you say you are...”.
 Question was asked on a similar scale to 2022. Grouping of stakeholder audiences differ year on year. Please exercise caution when comparing 2022 results to 2020 and 2018.



Stakeholder understanding of FRDC roles and responsibilities



How well would you say you understand what FRDC's roles and responsibilities are?
 Asked to all respondents.

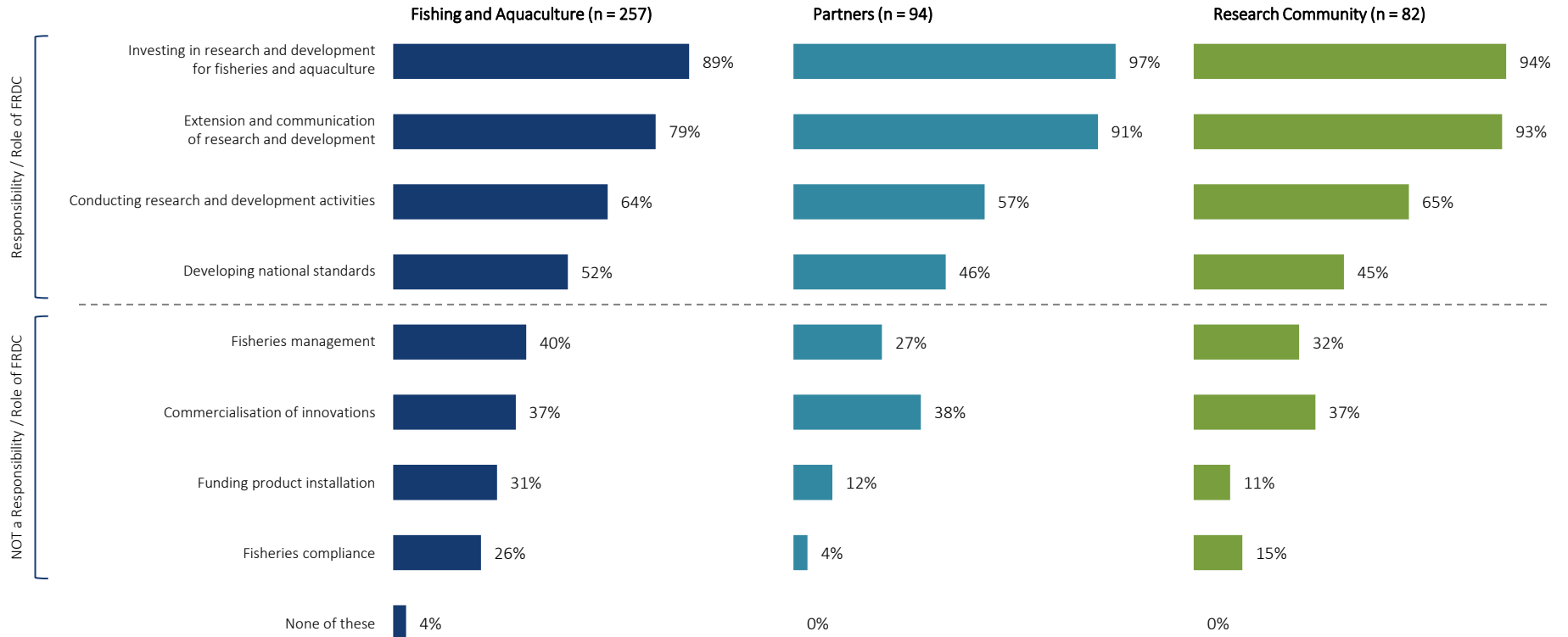


	Fishing and Aquaculture (n = 257)	Partners (n = 94)	Research Community (n = 82)
% very well + fairly well	57%	85%	79%

Segments of Fishing & Aquaculture	Aquaculture (n = 102)	Commercial Wild Catch (n = 177)	Supply Chain (n = 68)	Indigenous (n = 20)	Recreational Fishers (n = 114)
% very well + fairly well	56%	63%	71%	65%	67%

Based on what you understand, which of the following does FRDC have responsibility for or play a role in? Please select all that apply.

Asked to all respondents.

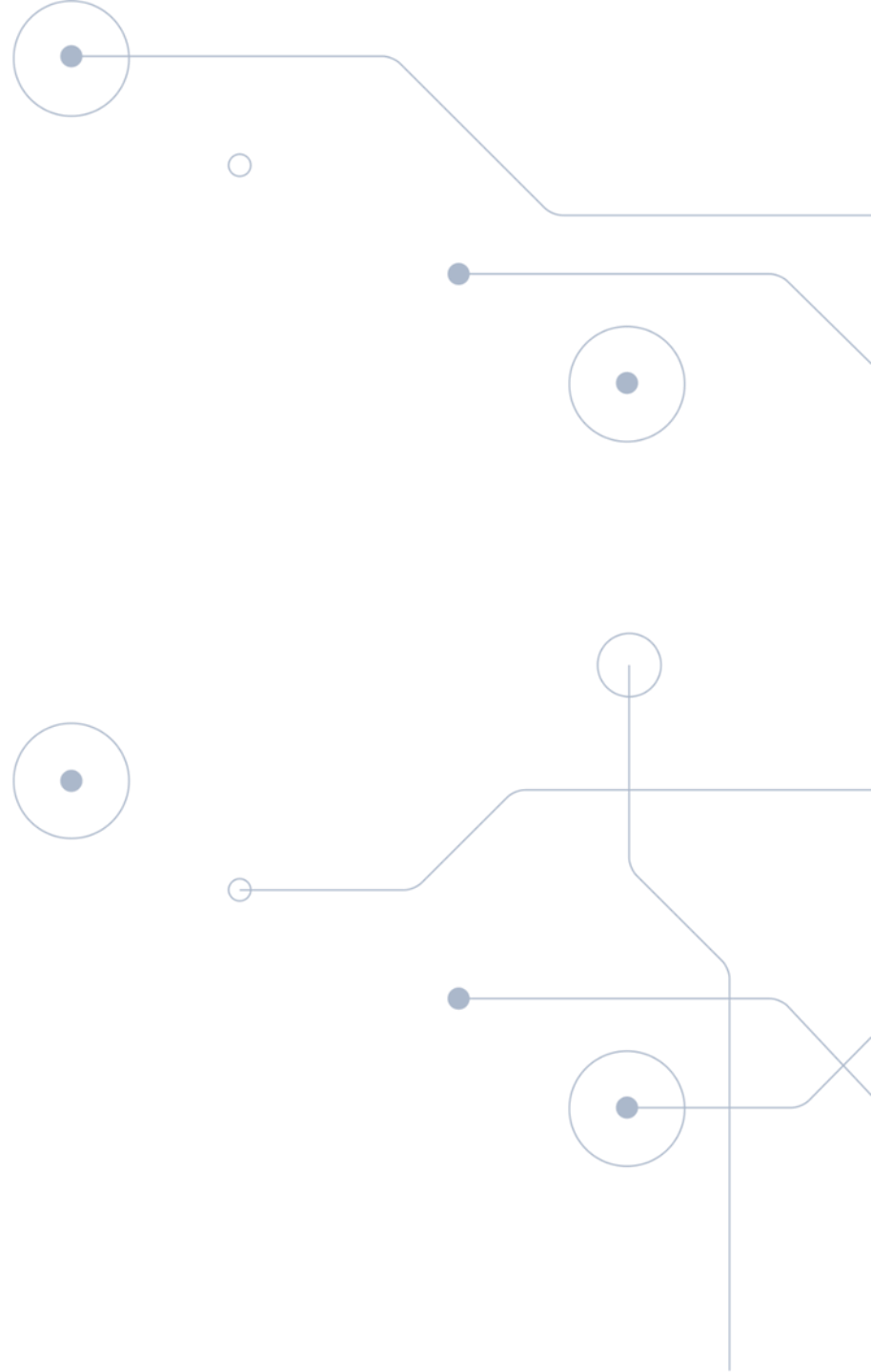


Based on what you understand, which of the following does FRDC have responsibility for or play a role in? Please select all that apply.
 Asked to all respondents.

	Fishing and Aquaculture (n = 257)	Partners (n = 94)	Research Community (n = 82)
Correct responsibilities / roles of FRDC recalled			
None recalled	7%	2%	0%
One recalled	10%	5%	5%
Two recalled	13%	21%	22%
Three recalled	31%	41%	45%
All four recalled	39%	30%	28%
% recalling at least one "correct" responsibility/role	93%	98%	100%
% recalling at least one "incorrect" responsibility/role	61%	52%	51%
% recalling all four "correct" and zero "incorrect" responsibilities/roles	5%	11%	5%

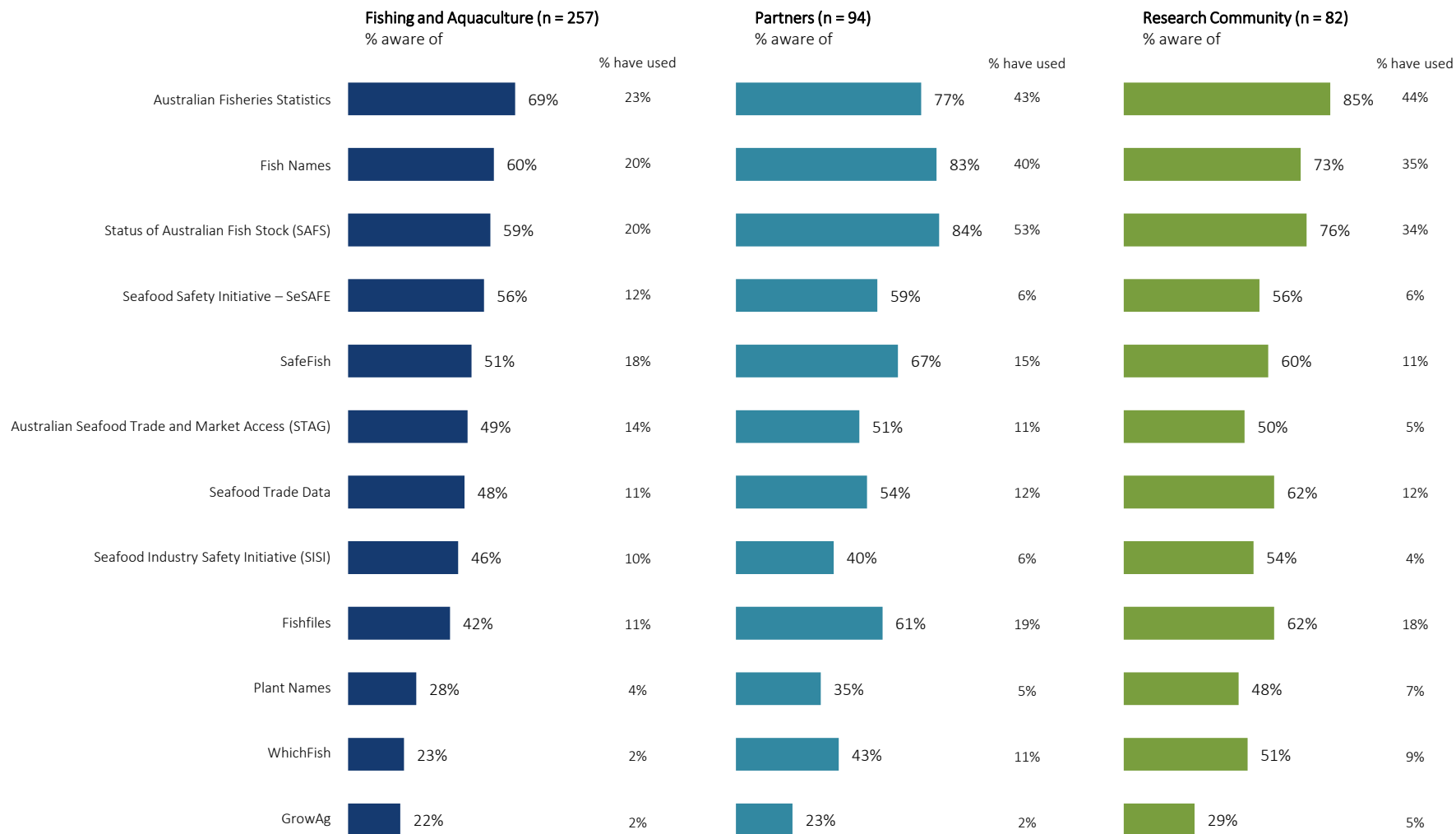


Stakeholder experience with:
FRDC services, activities & extension



Awareness and/or use of FRDC services

Over the past 12 months, have you used or been aware of any of the following services? Please select all that apply.
 Asked to all respondents.

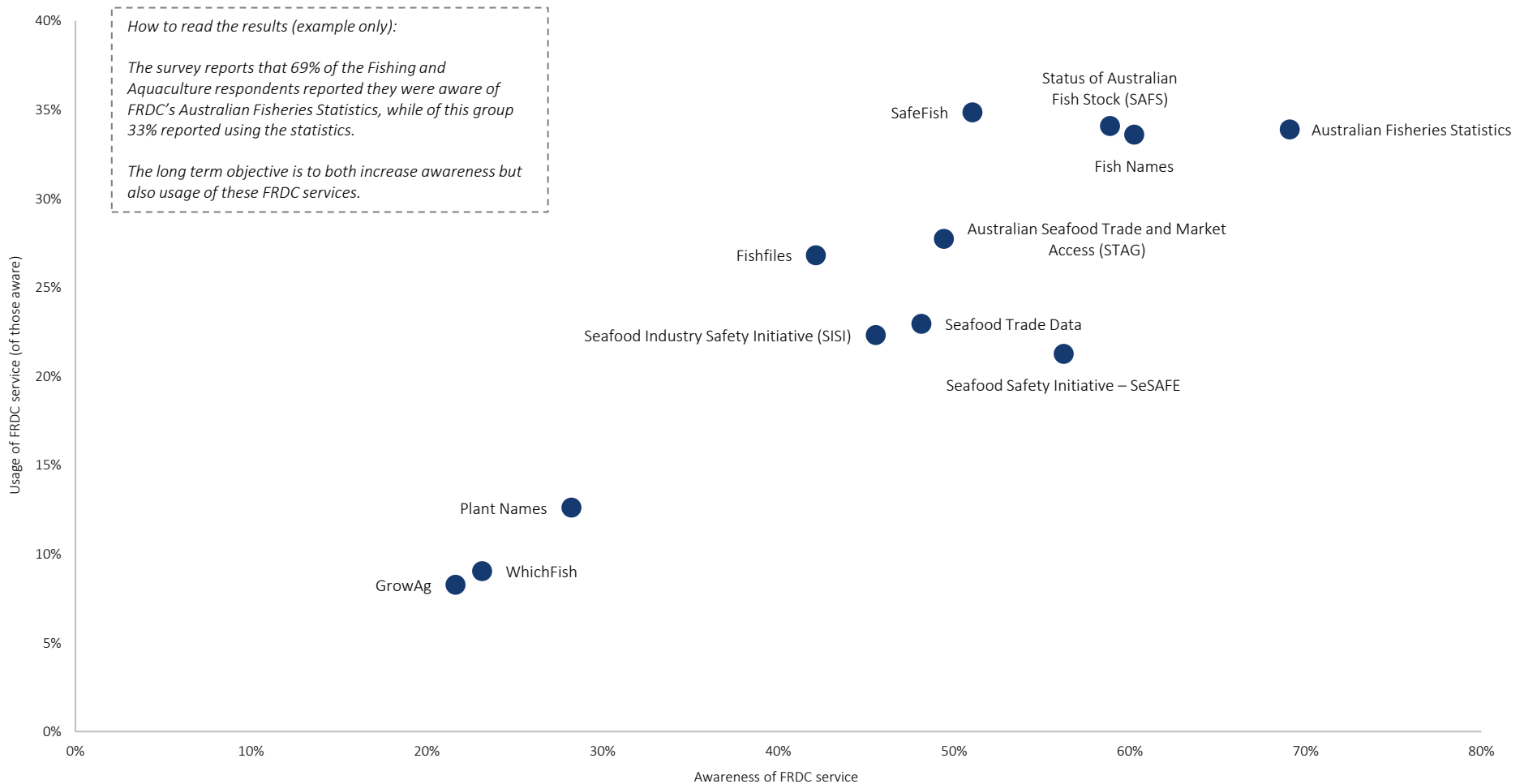


Over the past 12 months, have you used or been aware of any of the following services? Please select all that apply.
 Asked to all respondents.

	Fishing and Aquaculture (n = 257)	Partners (n = 94)	Research Community (n = 82)
Average # of FRDC services aware of	5.5 out of 12	6.8 out of 12	7.1 out of 12
None aware	12%	5%	6%
One to three aware	21%	11%	15%
Four to six aware	27%	27%	24%
Seven to eleven aware	30%	49%	39%
All twelve aware	10%	9%	16%

Mapping awareness and use of FRDC services

Fishing and Aquaculture (n = 257) mapping of awareness of FRDC services (X-Axis) against the usage of FRDC services among those aware (Y-Axis).



Reported outcomes from using FRDC services

The following question is asked to those who have used FRDC services over the past 12 months:

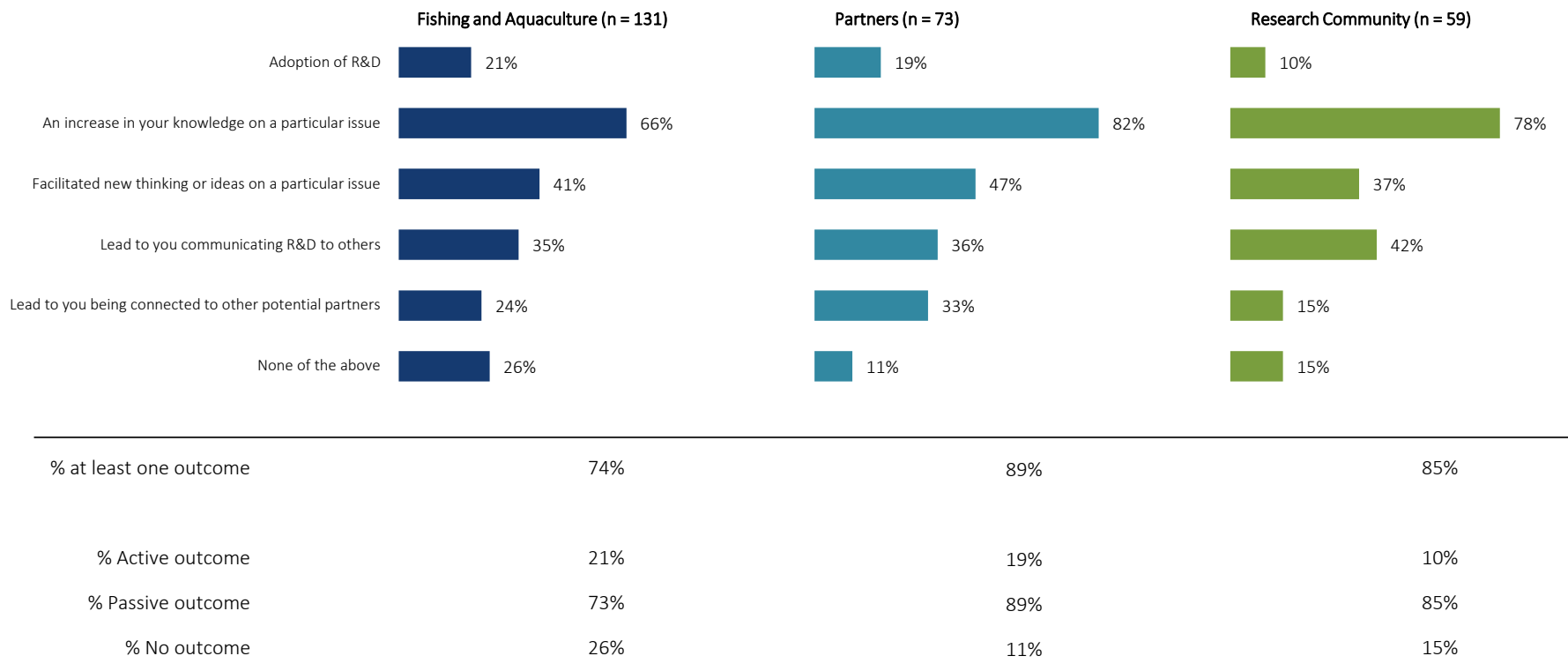
50%

78%

72%

Did your utilisation of these FRDC services lead to any of the following outcomes? Please select all that apply.

Asked to all respondents who have utilised FRDC services over the past 12 months.



Usage and outcomes from FRDC services

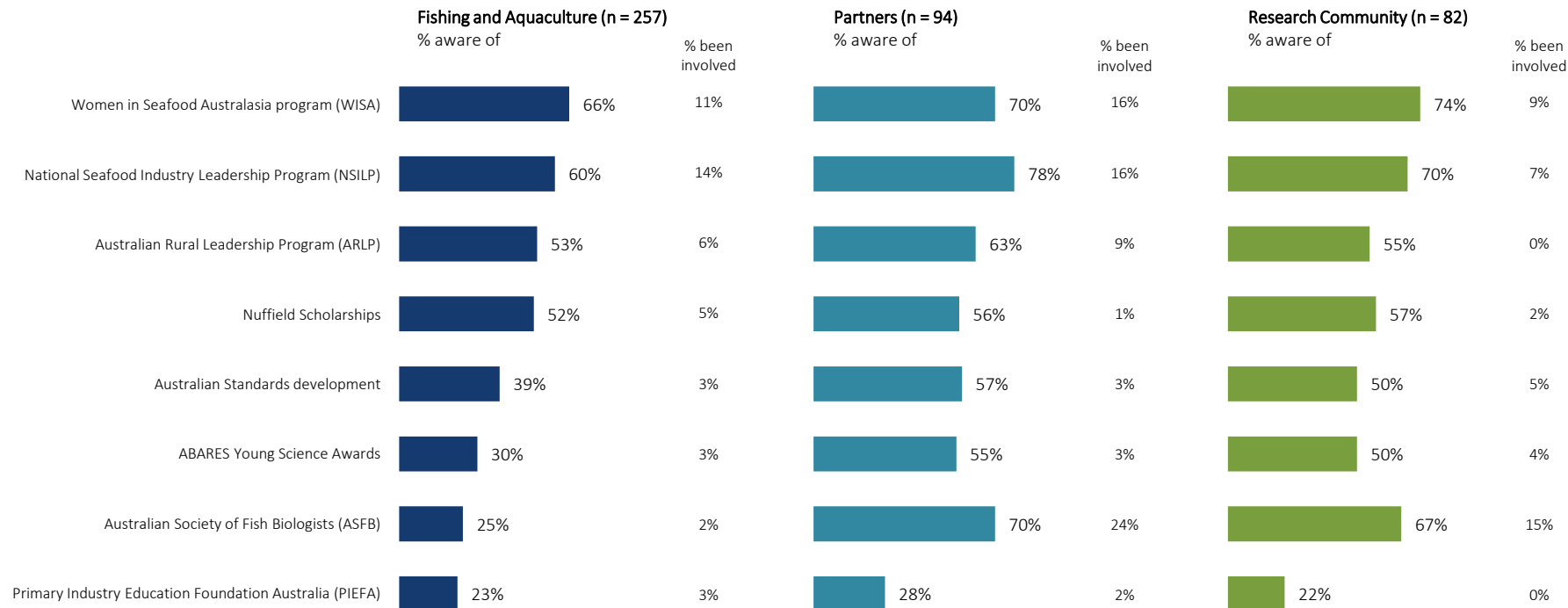
Usage and outcomes from FRDC services over the past 12 months
 Asked to all respondents.

	Fishing and Aquaculture (n = 257)	Partners (n = 94)	Research Community (n = 82)
Used at least one FRDC service	50%	78%	72%
<i>Of those who used...</i>			
% reported at least one outcome (active or passive)	74%	89%	85%
<i>Of all respondents...</i>			
Used at least one FRDC service AND reported at least one outcome (active or passive)	37%	69%	61%

Segments of Fishing & Aquaculture	Aquaculture (n = 102)	Commercial Wild Catch (n = 177)	Supply Chain (n = 68)	Indigenous (n = 20)	Recreational Fishers (n = 114)
Used at least one FRDC service	50%	54%	56%	35%	53%
<i>Of those who used...</i>					
% reported at least one outcome (active or passive)	73%	77%	71%	100%	85%
<i>Of all respondents...</i>					
Used at least one FRDC service AND reported at least one outcome (active or passive)	36%	41%	40%	35%	45%

Awareness and/or involvement in FRDC activities

Over the past 12 months, have you been involved in or aware of any of the following FRDC sponsored Capability and Capacity Building activities? Please select all that apply.
 Asked to all respondents.



Over the past 12 months, have you been involved in or aware of any of the following FRDC sponsored Capability and Capacity Building activities? Please select all that apply.
 Asked to all respondents.

	Fishing and Aquaculture (n = 257)	Partners (n = 94)	Research Community (n = 82)
Average # of FRDC activities aware of	3.5 out of 8	4.8 out of 8	4.5 out of 8
None aware	18%	5%	10%
One to two aware	18%	13%	11%
Three to four aware	27%	23%	23%
Five to seven aware	30%	45%	43%
All eight aware	8%	14%	13%

	Fishing and Aquaculture (n = 257)	Partners (n = 94)	Research Community (n = 82)
Average # of FRDC activities involved in	0.5 out of 8	0.7 out of 8	0.4 out of 8
No involvement	73%	54%	70%
One involved in	16%	30%	24%
Two involved in	7%	9%	2%
Three or more involved in	4%	7%	4%

Reported outcomes from being involved in FRDC activities

The following question is asked to those who have been involved in FRDC sponsored Capability and Capacity Building activities over the past 12 months:

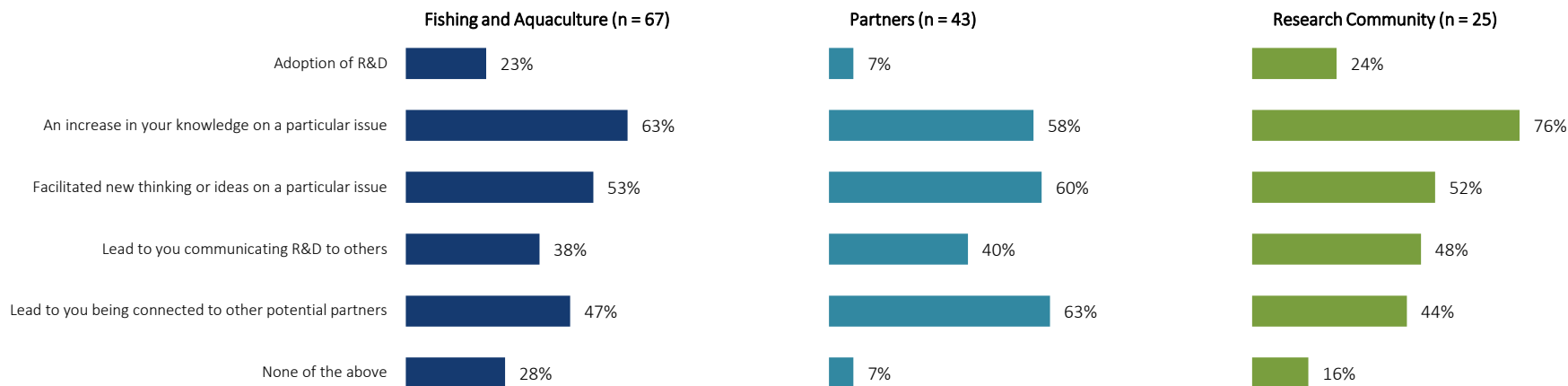
27%

46%

30%

Did your involvement in these Capability and Capacity Building activities lead to any of the following outcomes? Please select all that apply.

Asked to all respondents who have been involved in FRDC activities over the past 12 months.



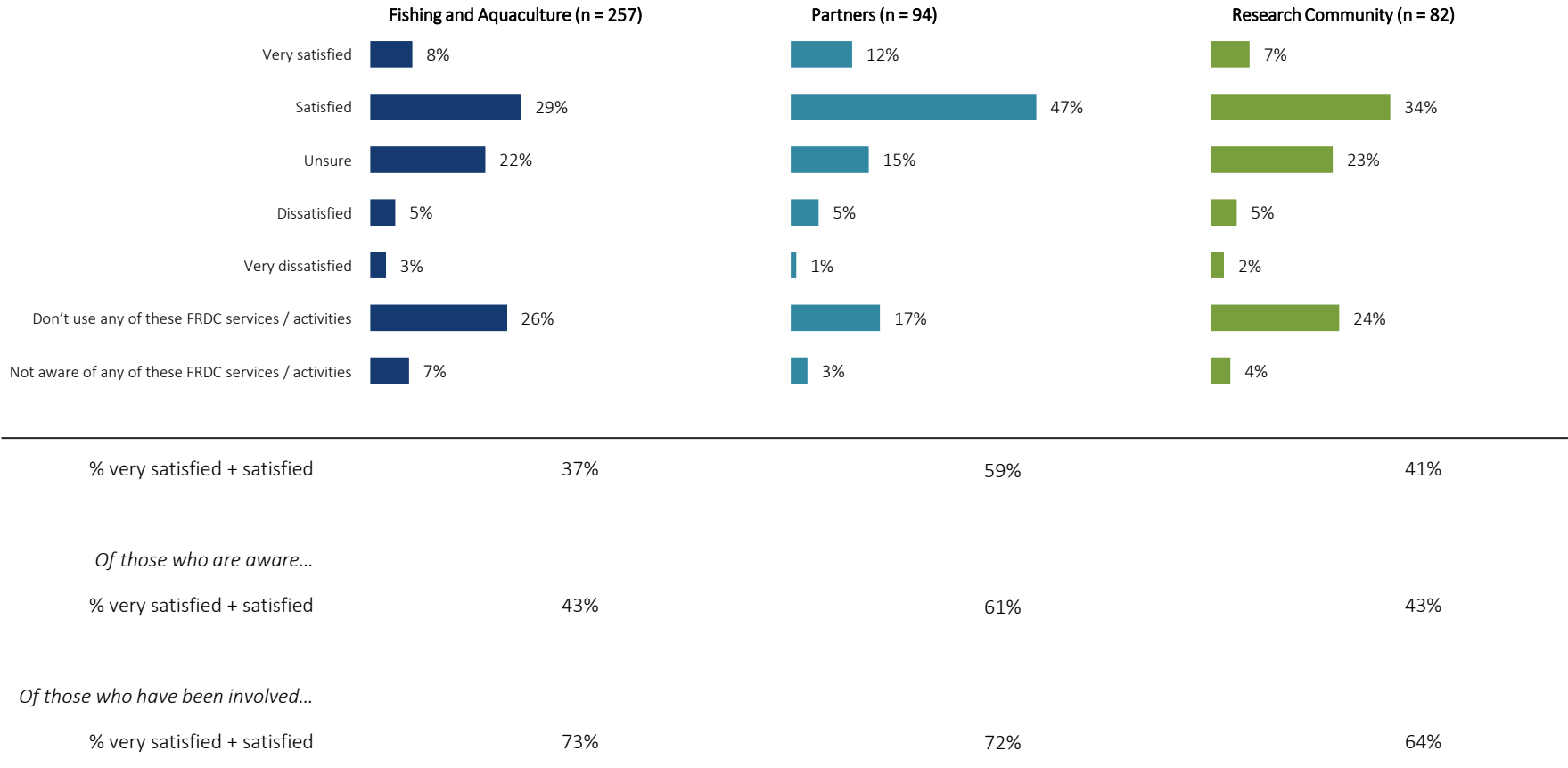
% at least one outcome	72%	93%	84%
% Active outcome	23%	7%	24%
% Passive outcome	72%	93%	84%
% No outcome	28%	7%	16%

Involvement and outcomes from FRDC sponsored Capability and Capacity Building activities over the past 12 months
 Asked to all respondents.

	Fishing and Aquaculture (n = 257)	Partners (n = 94)	Research Community (n = 82)
Involvement in at least one activity	27%	46%	30%
<i>Of those who were involved...</i>			
% reported at least one outcome (active or passive)	72%	93%	84%
<i>Of all respondents...</i>			
Involvement in at least one activity AND reported at least one outcome (active or passive)	20%	43%	26%

Segments of Fishing & Aquaculture	Aquaculture (n = 102)	Commercial Wild Catch (n = 177)	Supply Chain (n = 68)	Indigenous (n = 20)	Recreational Fishers (n = 114)
Involvement in at least one activity	30%	24%	24%	30%	7%
<i>Of those who were involved...</i>					
% reported at least one outcome (active or passive)	71%	76%	75%	50%	75%
<i>Of all respondents...</i>					
Involvement in at least one activity AND reported at least one outcome (active or passive)	22%	18%	18%	15%	5%

How satisfied are you with the services and Capability and Capacity Building activities FRDC provides to you? Would you say you are...?
 Asked to all respondents.

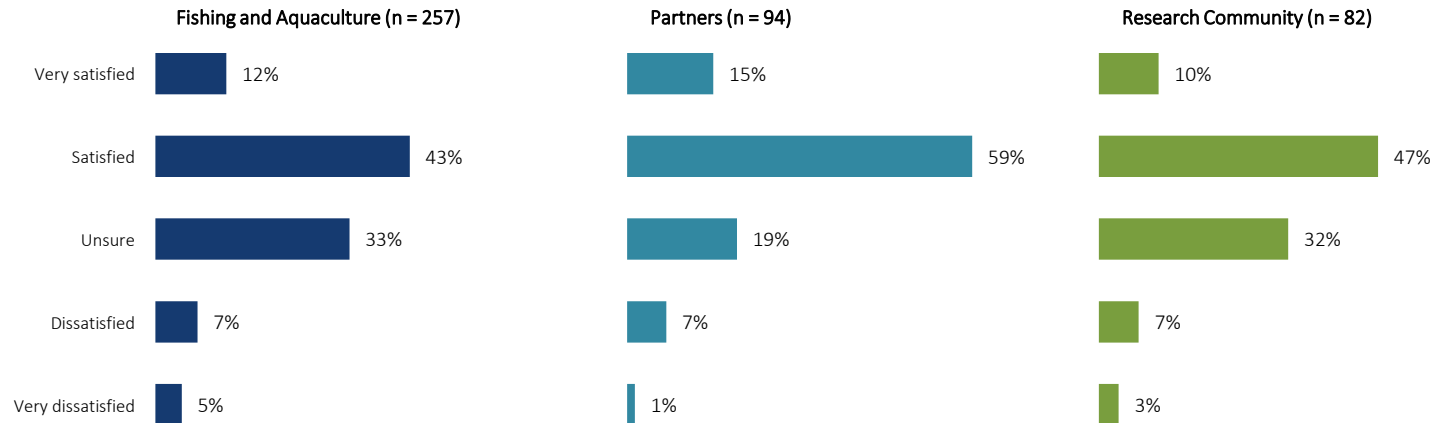


Satisfaction with FRDC activities

KPI 1

How satisfied are you with the services and Capability and Capacity Building activities FRDC provides to you? Would you say you are...?
 Asked to all respondents.

Results rebased to exclude "Don't use" and "Not sure" answers.



KPI 1 - % very satisfied + satisfied (excluding don't use / not aware)	55%	73%	58%
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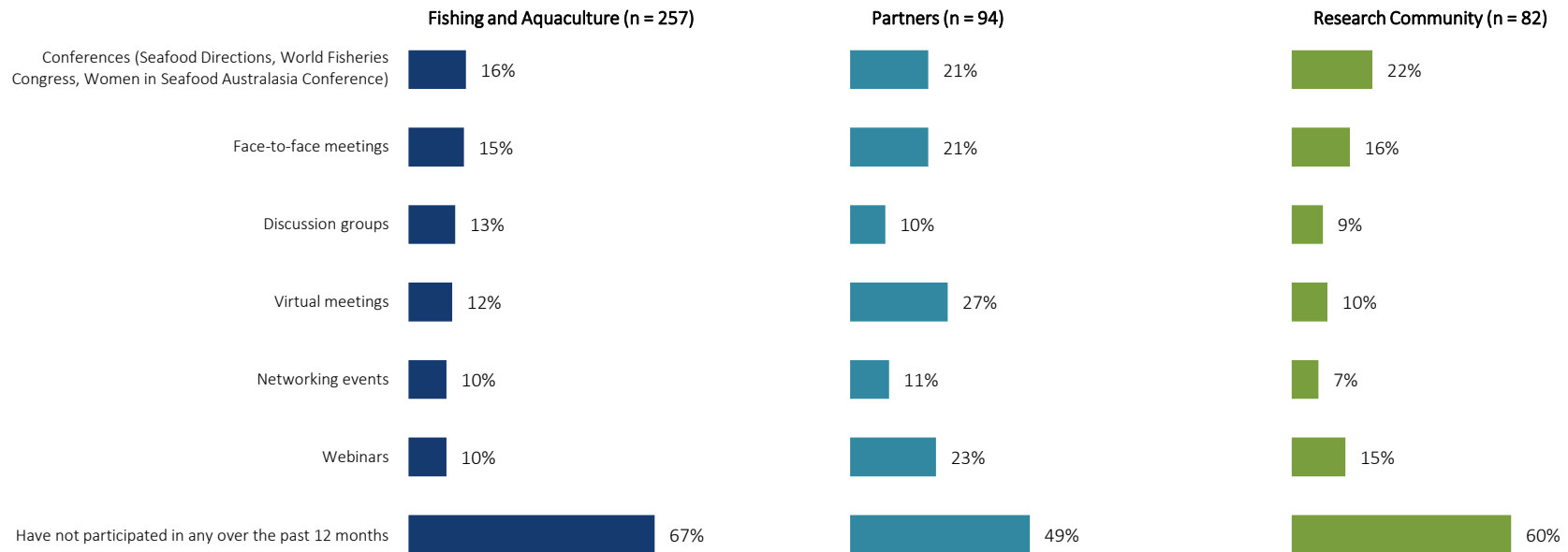
Segments of Fishing & Aquaculture	Aquaculture (n = 102)	Commercial Wild Catch (n = 177)	Supply Chain (n = 68)	Indigenous (n = 20)	Recreational Fishers (n = 114)
KPI 1 - % very satisfied + satisfied (excluding don't use / not aware)	63%	52%	67%	50%	63%

Participation in FRDC R&D extension events

From time to time, FRDC offers fishing and aquaculture stakeholders the opportunities to participate in FRDC R&D extension events. This includes webinars, networking events, virtual and face-to-face meetings, discussion groups and conferences.

Over the past 12 months, have you participated in any of these R&D events? Please select all that apply.

Asked to all respondents.



Reported outcomes from participating in FRDC R&D extension events

The following question is asked to those who have participated in FRDC R&D events over the past 12 months:

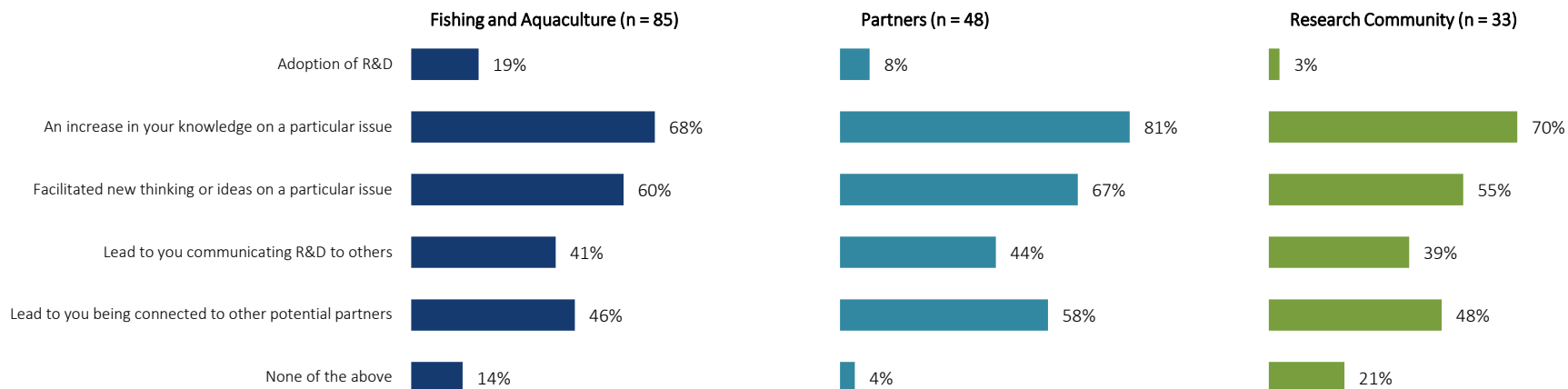
33%

51%

40%

Did your participation in these R&D events lead to any of the following outcomes? Please select all that apply.

Asked to all respondents who have participated in FRDC R&D events over the past 12 months.



% at least one outcome	86%	96%	79%
% Active outcome	19%	8%	3%
% Passive outcome	86%	94%	79%
% No outcome	14%	4%	21%

Participation and outcomes from FRDC R&D extension events

KPI 3

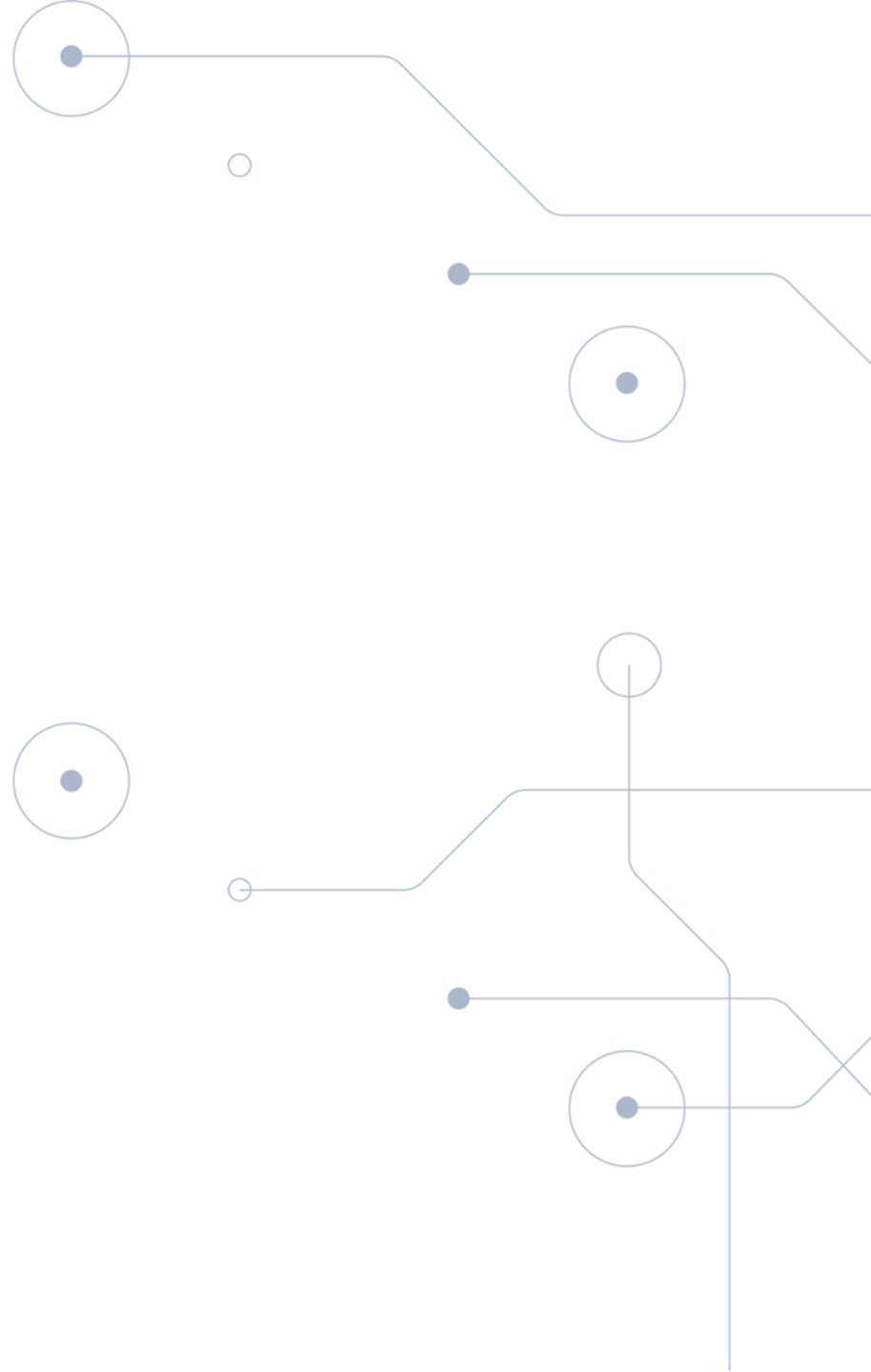
Participation and outcomes from FRDC R&D extension events over the past 12 months
 Asked to all respondents.

	Fishing and Aquaculture (n = 257)	Partners (n = 94)	Research Community (n = 82)
Participated in at least one R&D event	33%	51%	40%
<i>Of those who participated...</i>			
KPI 3 - % reported at least one outcome (active or passive)	86%	96%	79%
<i>Of all respondents...</i>			
Participated in at least one R&D event AND reported at least one outcome (active or passive)	28%	49%	32%

Segments of Fishing & Aquaculture	Aquaculture (n = 102)	Commercial Wild Catch (n = 177)	Supply Chain (n = 68)	Indigenous (n = 20)	Recreational Fishers (n = 114)
Participated in at least one R&D event	34%	33%	35%	35%	14%
<i>Of those who participated...</i>					
KPI 3 - % reported at least one outcome (active or passive)	91%	83%	88%	43%	94%
<i>Of all respondents...</i>					
Participated in at least one R&D event AND reported at least one outcome (active or passive)	31%	28%	31%	15%	13%



Stakeholder experience with:
FRDC Extension Officer Network (EON)



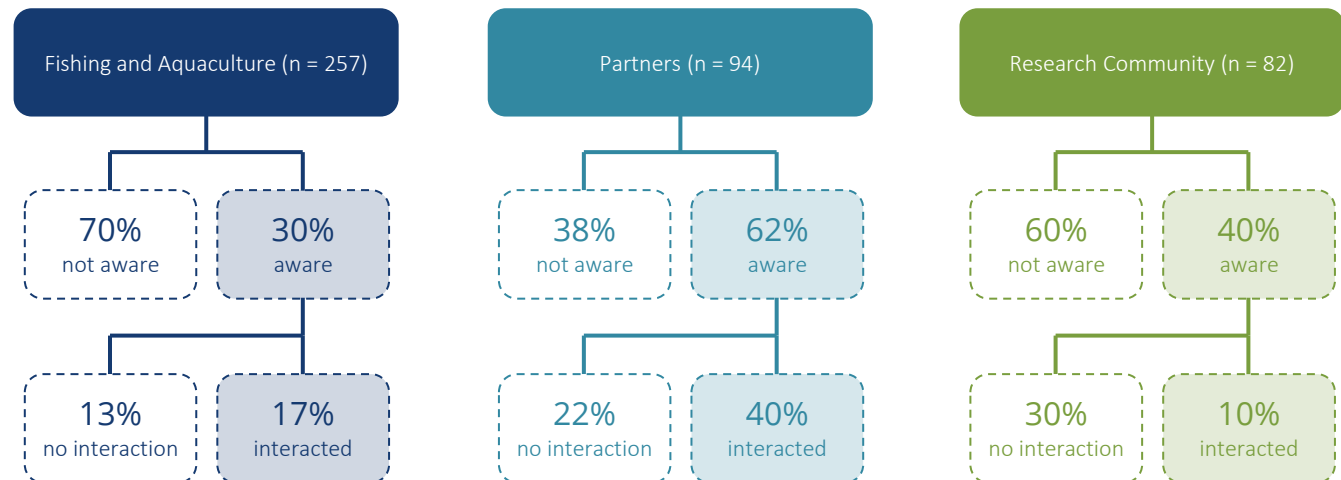
In mid 2022, FRDC made a strategic decision to employ regionally based Extension Officers across Australia.

The role of the extension officers is to directly engage with the people involved in fishing and aquaculture, to increase the adoption of research outcomes and to help tailor research and development (R&D) to their needs.

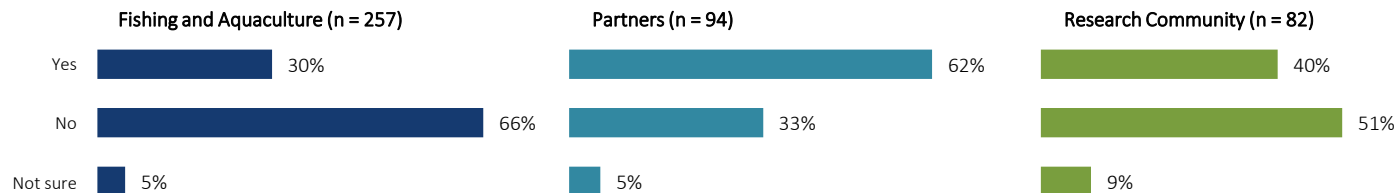
In addition, the Extension Officer Network (EON) was established to support each jurisdiction in Australia and to engage with stakeholders and learn more about their needs, connect stakeholders with R&D outputs, and make connections where needs, priorities, stakeholders and activities overlap.

The 2022 FRDC Stakeholder Survey provides a first (and early) measure of stakeholder's awareness of and engagement with these newly appointed Extension officers.

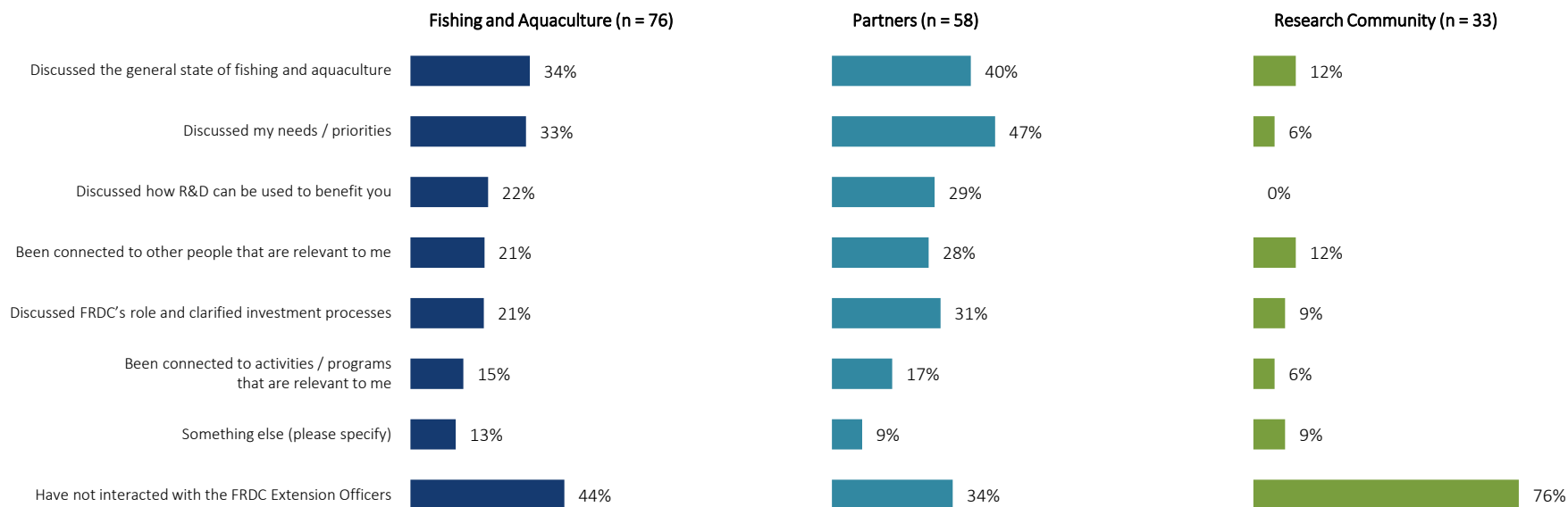
Awareness and interactions with FRDC Extension Officers



Are you aware of the new FRDC Extension Officer Network?
 Asked to all respondents.



Which of the following interactions have you had with any of the new FRDC Extension Officers? Please select all that apply.
 Asked to all respondents aware of the FRDC Extension Officer Network.



The following question is asked to those who have interacted with the FRDC Extension Officers:

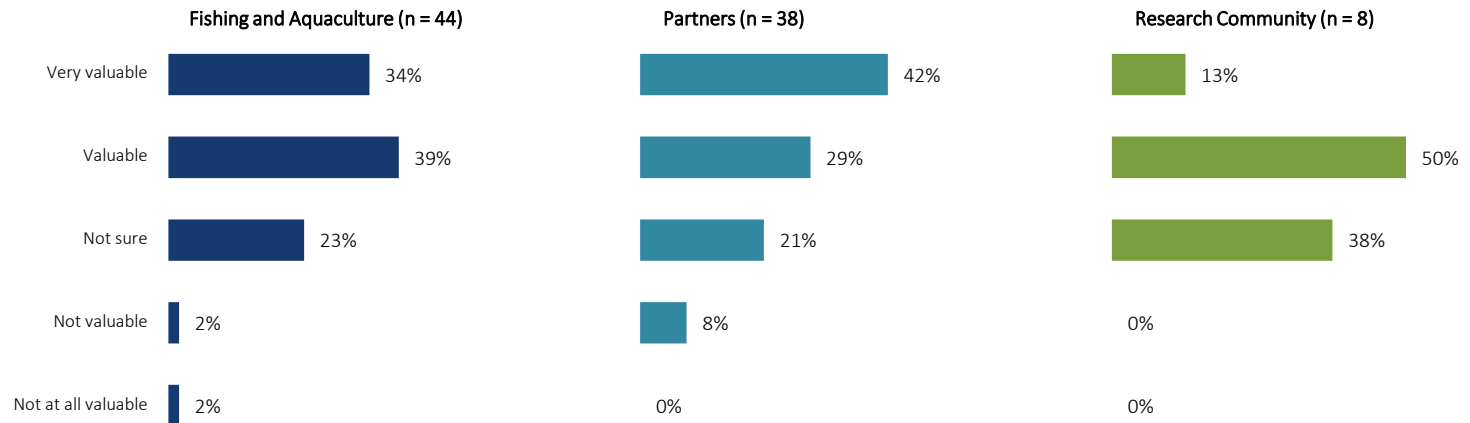
17%

40%

10%

Thinking about the interactions you've had, how valuable do you think these new Extension Officers are?

Asked to all respondents who have interacted with the FRDC Extension Officers.



% very valuable + valuable

73%

71%

63%

Reported outcomes from interacting with the FRDC Extension Officers

The following question is asked to those who have interacted with the FRDC Extension Officers:

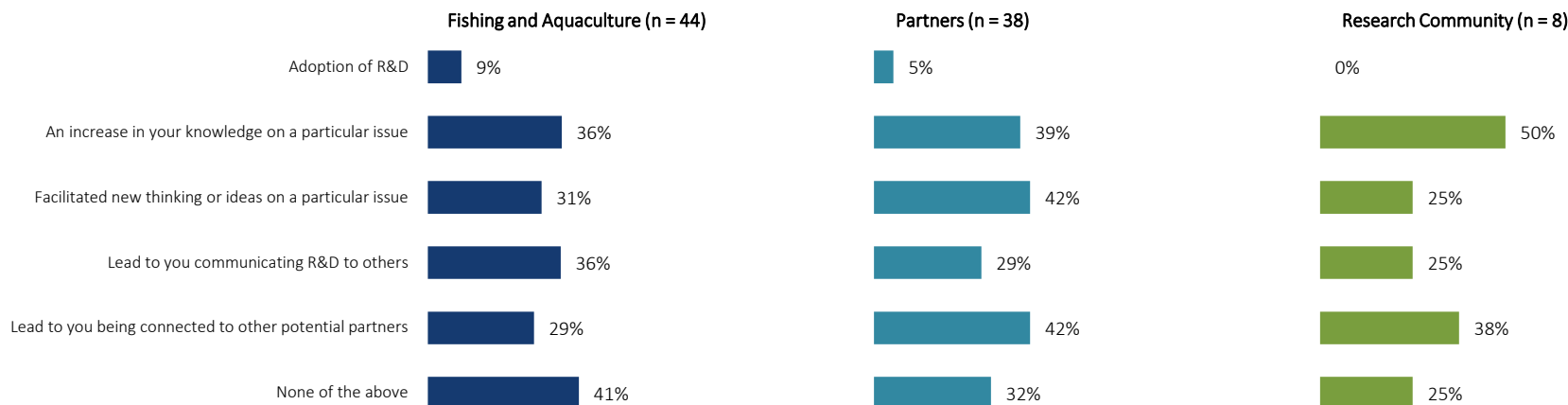
17%

40%

10%

Did your interactions with FRDC Extension Officers lead to any of the following outcomes? Please select all that apply.

Asked to all respondents who have interacted with the FRDC Extension Officers.



% at least one outcome	59%	68%	75%
% Active outcome	9%	5%	0%
% Passive outcome	59%	68%	75%
% No outcome	41%	32%	25%

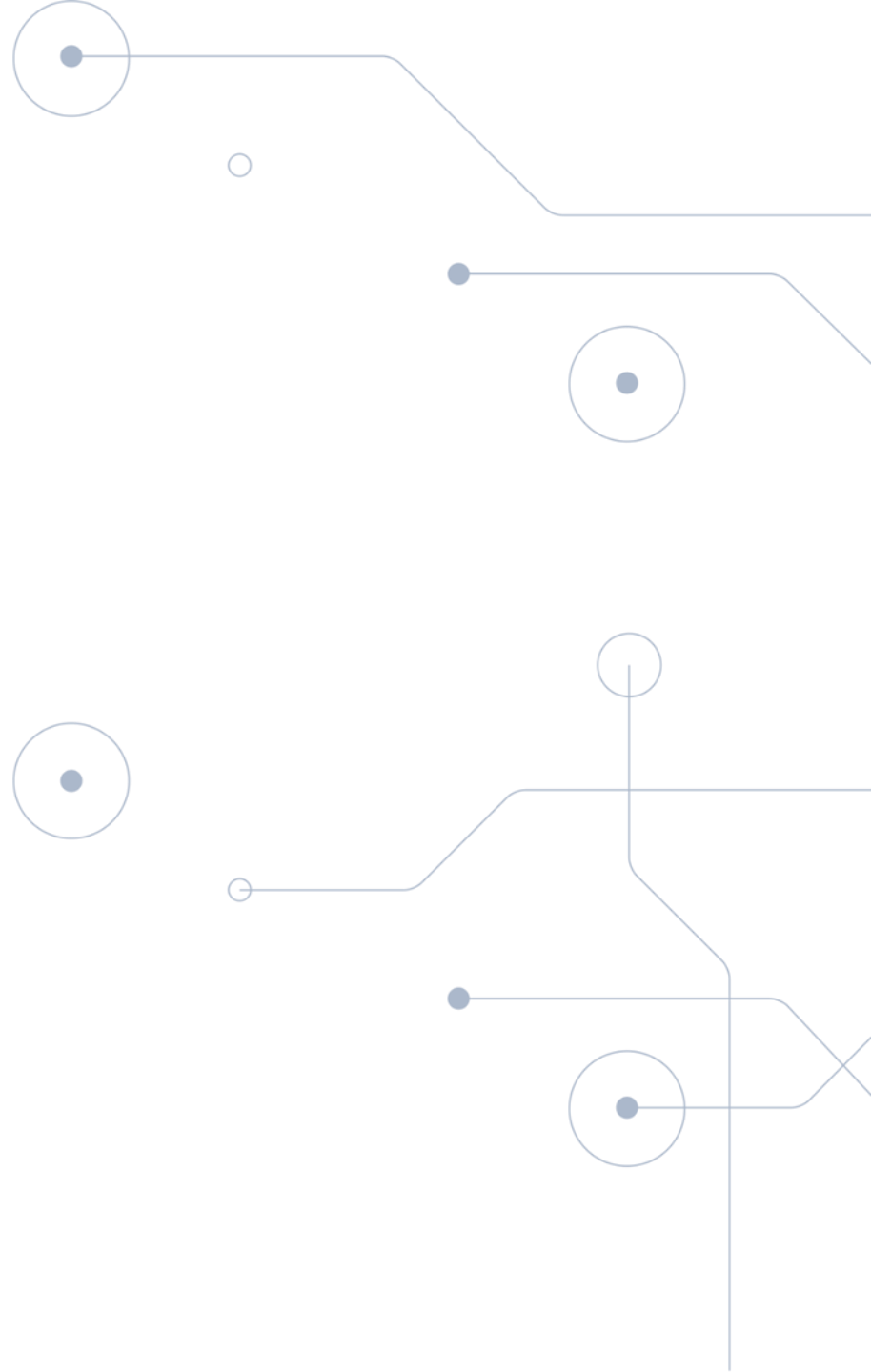
Interaction and outcomes from FRDC Extension Officers
 Asked to all respondents.

	Fishing and Aquaculture (n = 257)	Partners (n = 94)	Research Community (n = 82)
Interacted with the Extension Officers	17%	40%	10%
<i>Of those who interacted...</i>			
% reported at least one outcome (active or passive)	59%	68%	75%
<i>Of all respondents...</i>			
Interacted with the Extension Officers AND reported at least one outcome (active or passive)	10%	28%	7%

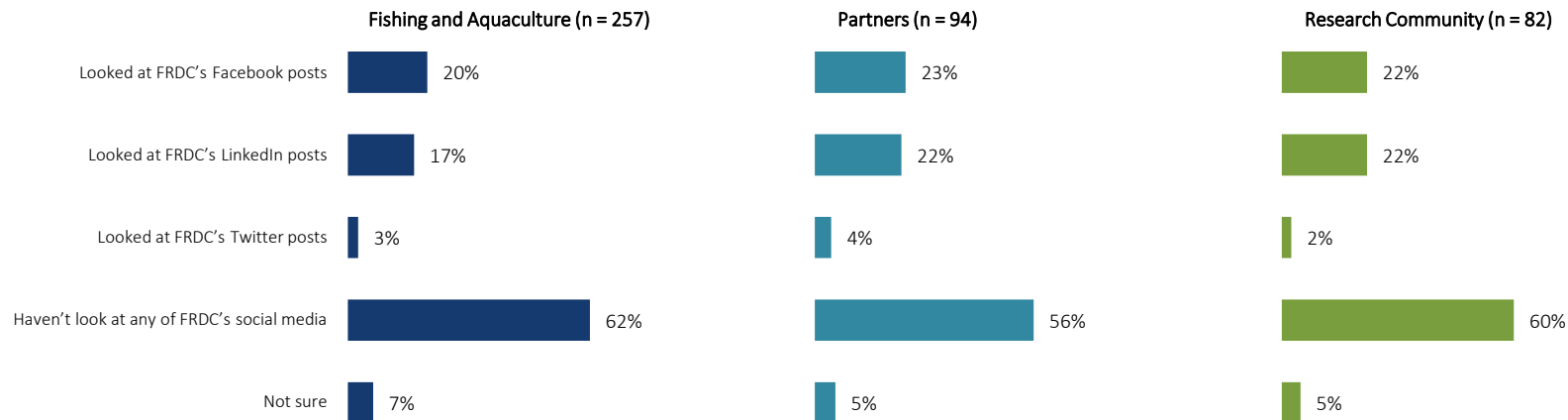
Segments of Fishing & Aquaculture	Aquaculture (n = 102)	Commercial Wild Catch (n = 177)	Supply Chain (n = 68)	Indigenous (n = 20)	Recreational Fishers (n = 114)
Interacted with the Extension Officers	15%	18%	10%	30%	6%
<i>Of those who interacted...</i>					
% reported at least one outcome (active or passive)	47%	78%	100%	83%	71%
<i>Of all respondents...</i>					
Interacted with the Extension Officers AND reported at least one outcome (active or passive)	7%	14%	10%	25%	4%



Stakeholder experience with: FRDC social media and information



Over the past 12 months, have you looked at information or updates on these FRDC social media feeds? Please select all that apply.
 Asked to all respondents.



	Fishing and Aquaculture (n = 257)	Partners (n = 94)	Research Community (n = 82)
% looked at FRDC social media	31%	38%	35%
Looked at Facebook only	14%	14%	13%
Looked at LinkedIn only	10%	13%	13%
Looked at Facebook and LinkedIn	7%	10%	9%
Did not look or not sure	69%	62%	65%

Reported outcomes from engaging with FRDC social media

The following question is asked to those who have looked at FRDC social media over the past 12 months:

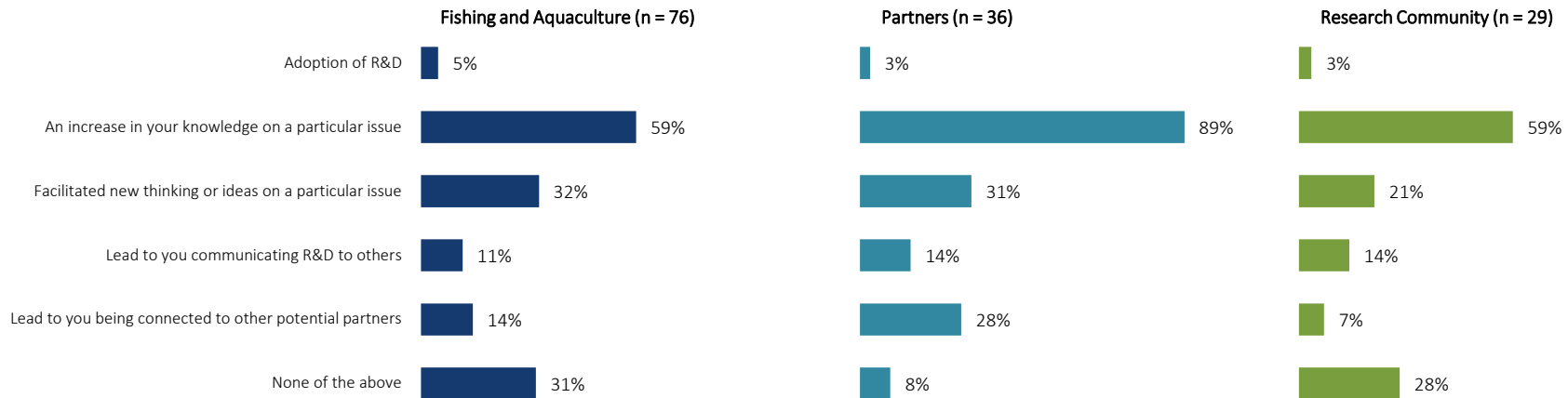
31%

38%

35%

Did looking at FRDC's social media lead to any of the following outcomes? Please select all that apply.

Asked to all respondents who have looked at FRDC social media.



% at least one outcome	69%	92%	72%
% Active outcome	5%	3%	3%
% Passive outcome	69%	92%	72%
% No outcome	31%	8%	28%

Interaction and outcomes from FRDC social media

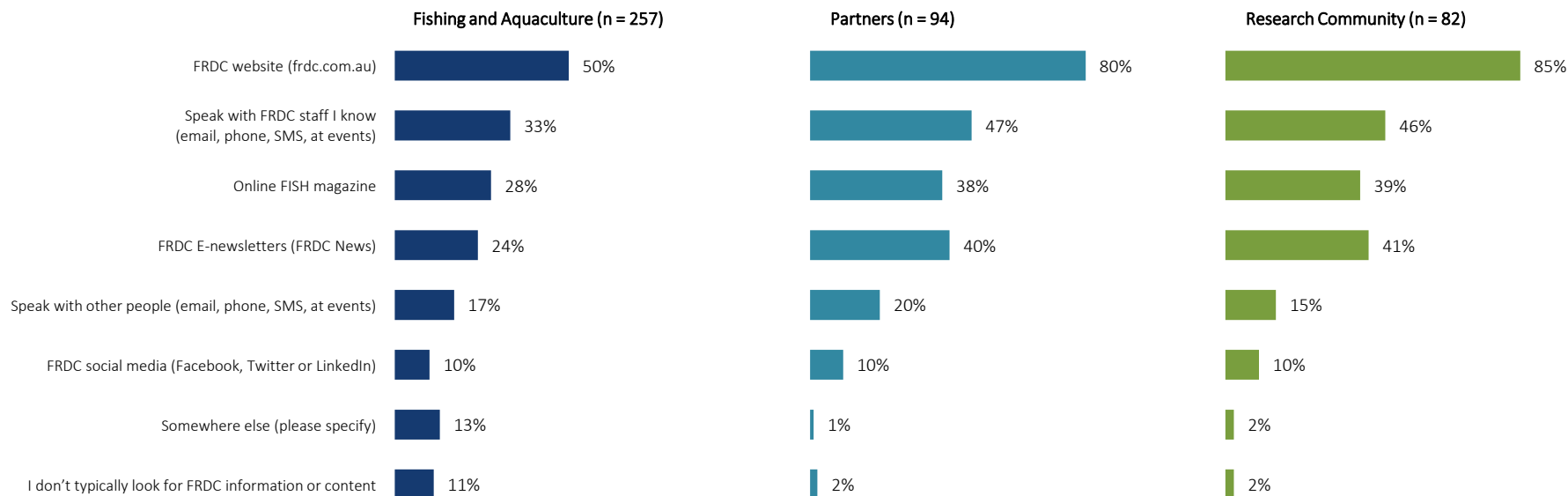
Interaction and outcomes from FRDC social media over the past 12 months
 Asked to all respondents.

	Fishing and Aquaculture (n = 257)	Partners (n = 94)	Research Community (n = 82)
Looked at FRDC social media	31%	38%	35%
<i>Of those who looked...</i>			
% reported at least one outcome (active or passive)	69%	92%	72%
<i>Of all respondents...</i>			
Looked at FRDC social media AND reported at least one outcome (active or passive)	21%	35%	26%

Segments of Fishing & Aquaculture	Aquaculture (n = 102)	Commercial Wild Catch (n = 177)	Supply Chain (n = 68)	Indigenous (n = 20)	Recreational Fishers (n = 114)
Looked at FRDC social media	35%	27%	32%	25%	29%
<i>Of those who looked...</i>					
% reported at least one outcome (active or passive)	69%	64%	59%	40%	64%
<i>Of all respondents...</i>					
Looked at FRDC social media AND reported at least one outcome (active or passive)	25%	17%	19%	10%	18%

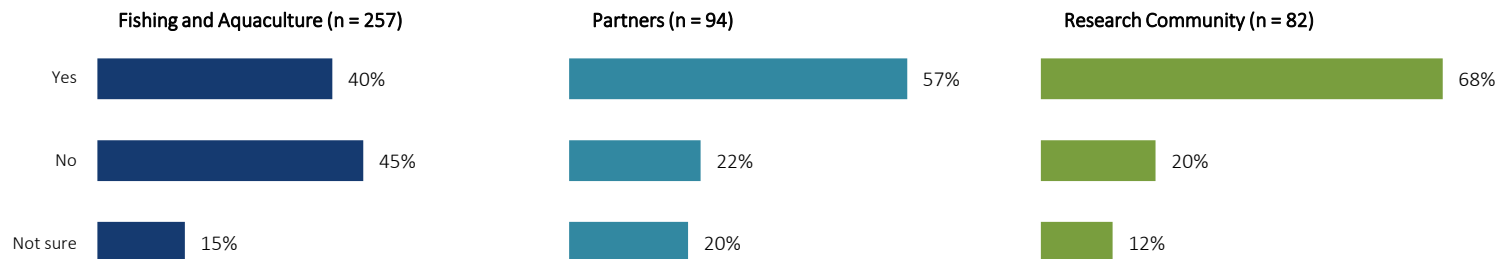
If you were looking for information from FRDC or wanted to find out more about R&D projects and outcomes or see what FRDC supported activities and events were available, where would you prefer to go to find this information or content? Please select all that apply.

Asked to all respondents.



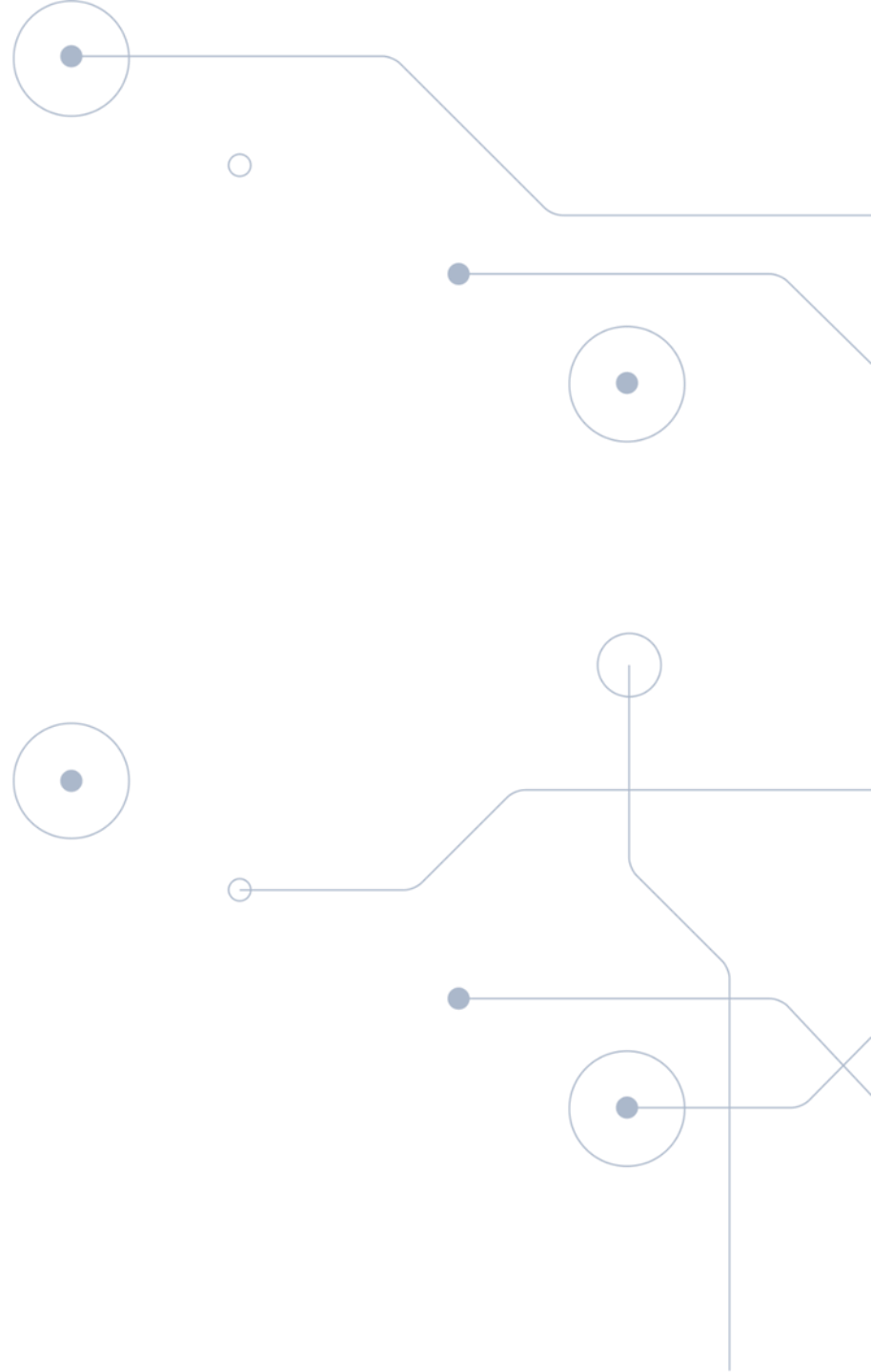
Over the past 12 months, have you come across information from FRDC that has described the impacts of the R&D it has supported?

Asked to all respondents.



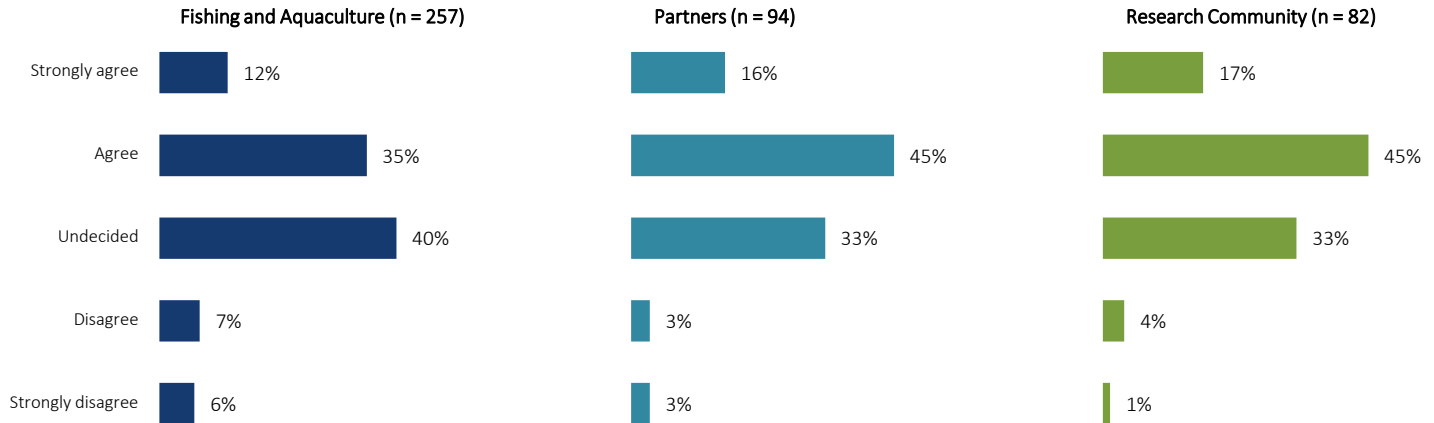


FRDC key indicators



Would you agree or disagree that FRDC is transparent in how it communicates the impacts of the R&D it has supported?

Asked to all respondents.



KPI 5 - % strongly agree + agree

47%

61%

62%

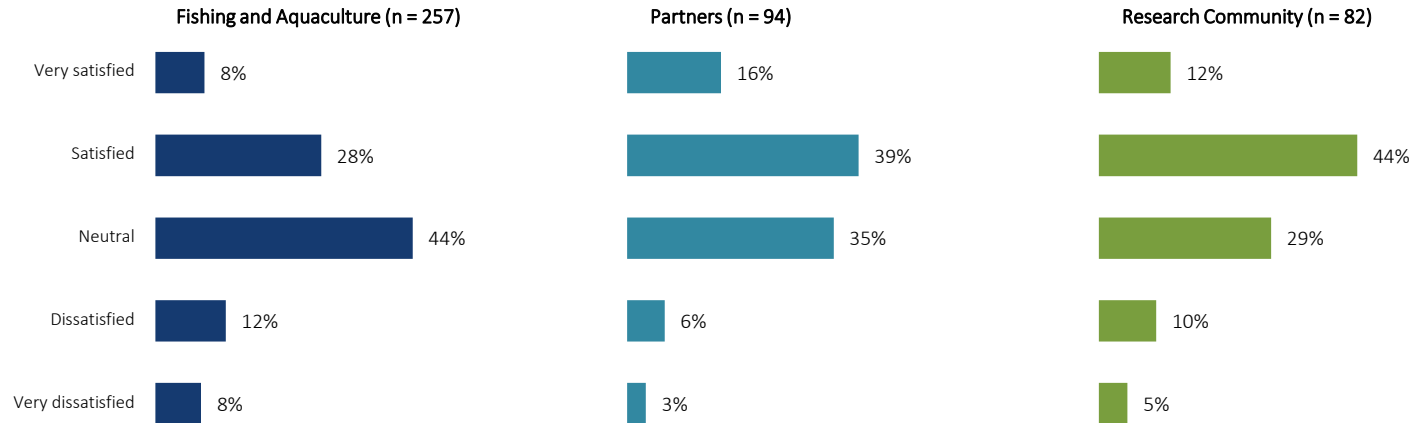
Segments of Fishing & Aquaculture	Aquaculture (n = 102)	Commercial Wild Catch (n = 177)	Supply Chain (n = 68)	Indigenous (n = 20)	Recreational Fishers (n = 114)
KPI 5 - % strongly agree + agree	49%	46%	51%	30%	54%

Satisfaction with FRDC investment

KPI 2

How satisfied are you that financial contributions from industry and Government to FRDC are being invested wisely and for the benefit of both the fishing and aquaculture sectors and the Australian community? Would you say you feel...?

Asked to all respondents.



KPI 2 - % very satisfied + satisfied	37%	55%	56%
% very dissatisfied + dissatisfied	20%	10%	15%
NETT Satisfaction*	+16	+46	+41

Segments of Fishing & Aquaculture	Aquaculture (n = 102)	Commercial Wild Catch (n = 177)	Supply Chain (n = 68)	Indigenous (n = 20)	Recreational Fishers (n = 114)
KPI 2 - % very satisfied + satisfied	38%	39%	35%	30%	43%
% very dissatisfied + dissatisfied	11%	28%	21%	25%	18%
NETT Satisfaction	+27	+11	+15	+5	+25

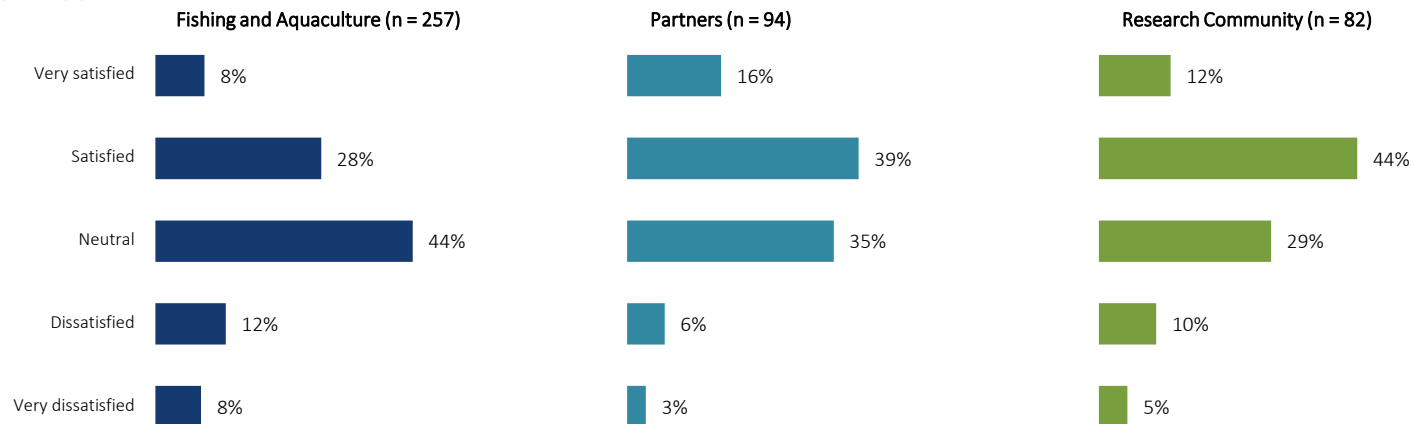
*NETT Satisfaction is the difference between the proportion of positive satisfaction responses and negative satisfaction responses. NETT Satisfaction scores are measured with a single question and reported with a number from -100 to +100, where a higher score is desirable.

Satisfaction with FRDC investment

KPI 2

How satisfied are you that financial contributions from industry and Government to FRDC are being invested wisely and for the benefit of both the fishing and aquaculture sectors and the Australian community? Would you say you feel...?

Asked to all respondents.



Results from 2020 and 2018*: 2020 Active Businesses – Mean: 6.0; Rating 8-10: 30% 2018 Commercial Fishers – Mean: 6.2; Rating 8-10: 41%

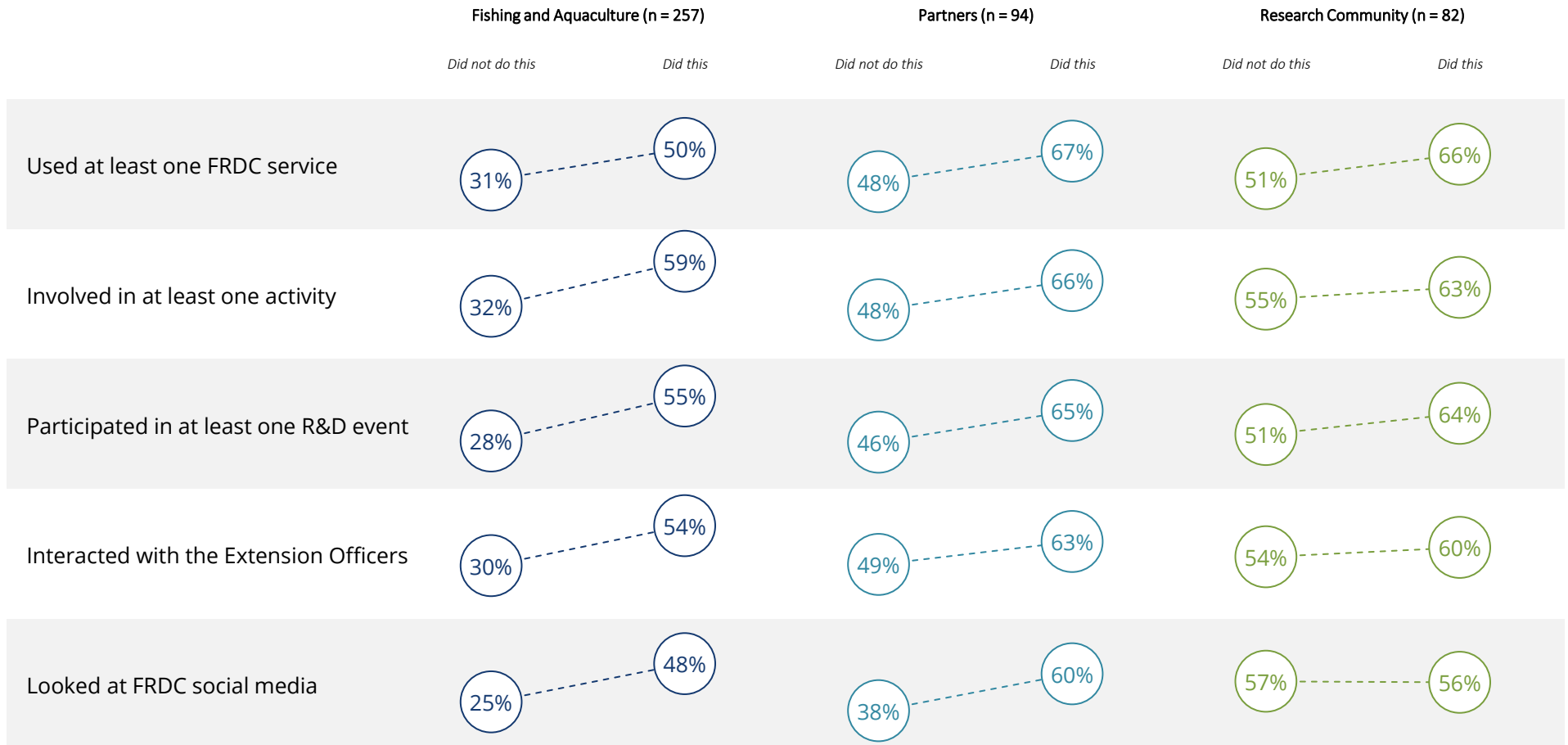
* Question asked: "Taking into account all of the things that we have discussed so far, overall how satisfied are you that contributions from industry and Government to FRDC are being invested wisely and for the benefit of the industry?".

Question was asked on a 0-10 scale of "0 – Extremely dissatisfied" to "10 – Extremely satisfied".

Grouping of stakeholder audiences differ year on year. Please exercise caution when comparing 2022 results to 2020 and 2018.

Satisfaction with FRDC investment

Proportion rating “Very satisfied” or “Satisfied” with FRDC investment across FRDC mechanisms
Asked to all respondents.

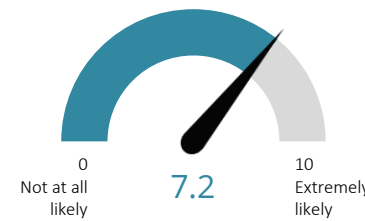
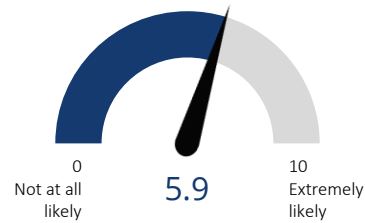


How likely would you be to recommend the R&D, information, services, resources and tools that FRDC has available to other people and businesses in the fishing and aquaculture industry?
 Asked to all Fishing and Aquaculture and Partners respondents. Excludes "Don't know" answers.

Fishing and Aquaculture (n = 232)

Partners (n = 82)

Research Community (n = 0)



Not asked to this segment

What is Net Promoter Score (NPS)?

NPS stands for Net Promoter Score which is a metric used in customer experience programs. NPS measures the loyalty of customers to an organisation. NPS scores are measured with a single question and reported with a number from -100 to +100, where a higher score is desirable.

Net Promoter Score



Promoters 19% Passives 33% Detractors 48%

Net Promoter Score

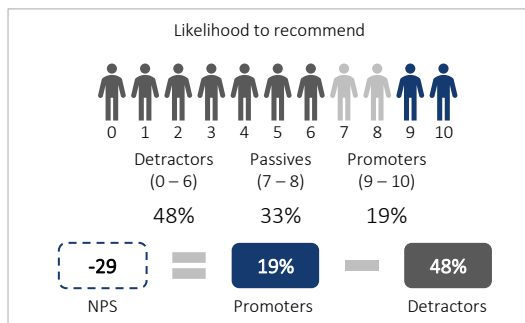


Promoters 26% Passives 45% Detractors 29%

Results from 2020 and 2018*:

2020 Active Businesses – Mean: 6.6; NPS: -14

2018 Commercial Fishers – Mean: 6.3; NPS: -11



* Question asked: "How likely would you be to recommend FRDC to other people and businesses in the fishing industry?". Question was asked on a similar scale to 2022. Grouping of stakeholder audiences differ year on year. Please exercise caution when comparing 2022 results to 2020 and 2018.

How likely would you be to recommend working with FRDC to other researchers and service providers?

Asked to all Research Community respondents. Excludes "Don't know" answers.

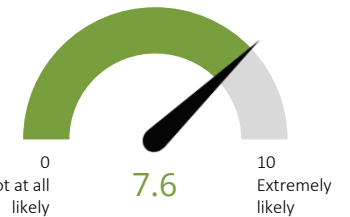
Fishing and Aquaculture (n = 0)

Partners (n = 0)

Research Community (n = 77)

Not asked to this segment

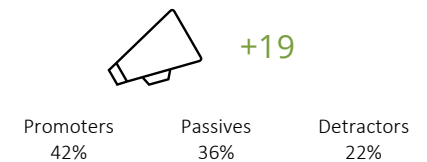
Not asked to this segment



What is Net Promoter Score (NPS)?

NPS stands for Net Promoter Score which is a metric used in customer experience programs. NPS measures the loyalty of customers to an organisation. NPS scores are measured with a single question and reported with a number from -100 to +100, where a higher score is desirable.

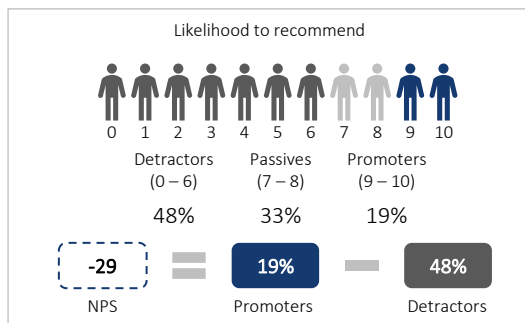
Net Promoter Score



Results from 2020 and 2018*:

2020 Active Businesses – Mean: 6.6; NPS: -14

2018 Commercial Fishers – Mean: 6.3; NPS: -11

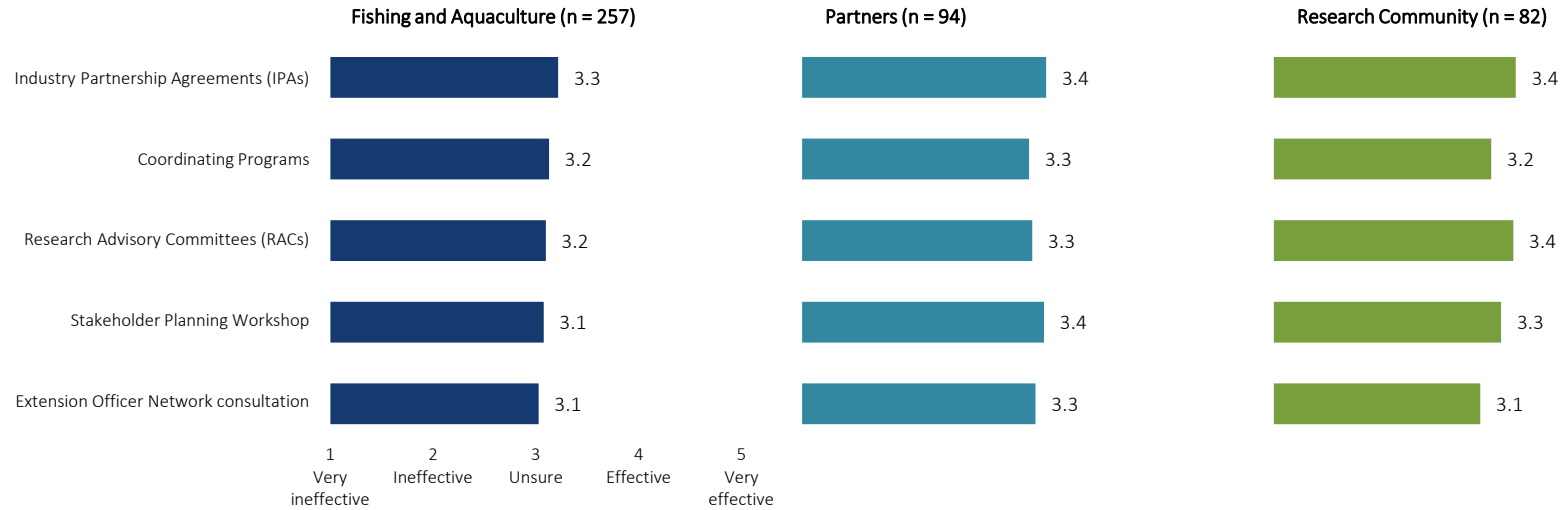


* Question asked: "How likely would you be to recommend FRDC to other people and businesses in the fishing industry?". Question was asked on a similar scale to 2022. Grouping of stakeholder audiences differ year on year. Please exercise caution when comparing 2022 results to 2020 and 2018.

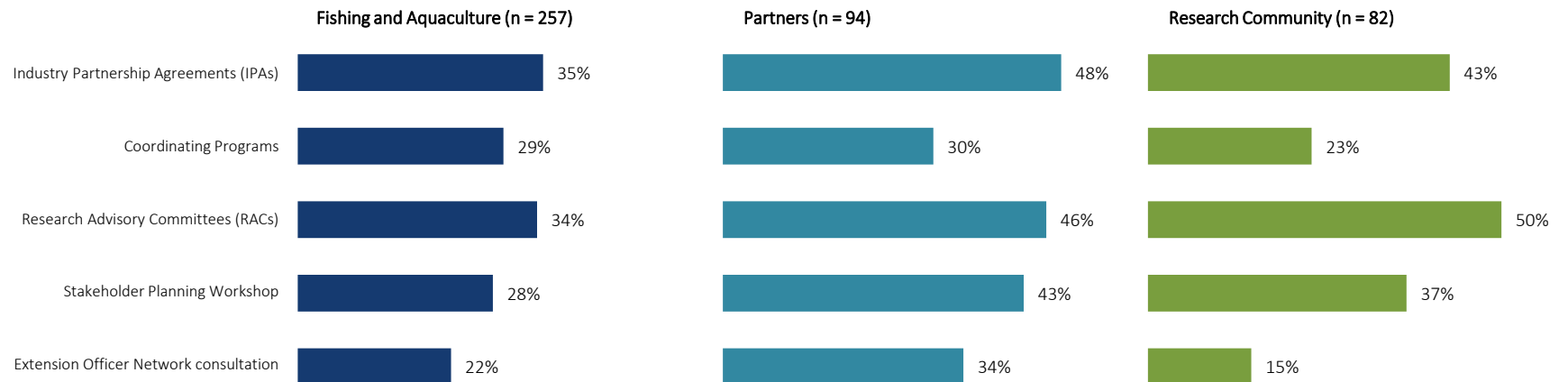
Effectiveness of mechanisms

How effective do you think the following mechanisms are for informing FRDC's investment priorities?

Asked to all respondents.



% of respondents rating "very effective" or "effective" for each of the following mechanisms



How effective do you think the following mechanisms are for informing FRDC's investment priorities?
 Asked to all respondents.

	Fishing and Aquaculture (n = 257)			Partners (n = 94)			Research Community (n = 82)		
	<i>% effective</i>	<i>% ineffective</i>	<i>NETT</i>	<i>% effective</i>	<i>% ineffective</i>	<i>NETT</i>	<i>% effective</i>	<i>% ineffective</i>	<i>NETT</i>
Industry Partnership Agreements (IPAs)	35%	12%	+23	48%	9%	+39	43%	7%	+35
Coordinating Programs	29%	11%	+18	30%	3%	+27	23%	7%	+16
Research Advisory Committees (RACs)	34%	16%	+18	46%	20%	+26	50%	13%	+37
Stakeholder Planning Workshop	28%	12%	+15	43%	3%	+39	37%	11%	+26
Extension Officer Network consultation	22%	12%	+10	34%	5%	+29	15%	7%	+7

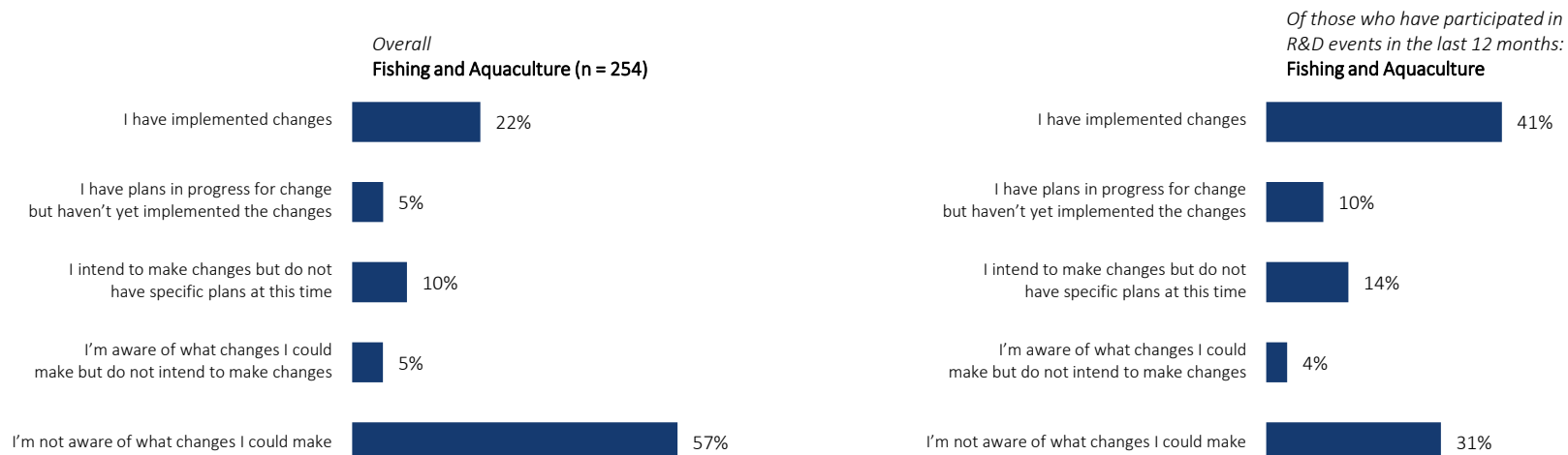
*NETT Effectiveness is the difference between the proportion of effective responses and ineffective responses.

NETT Effectiveness scores are measured with a single question and reported with a number from -100 to +100, where a higher score is desirable.

Changes due to FRDC outcomes

KPI 4

Thinking back over the last 3 years, have you made changes to your practices because of outcomes from any of the FRDC information, services or R&D projects?
 Asked to all Fishing and Aquaculture respondents.



Intend to or have made changes

38%

KPI 4 - Intend to or have made changes

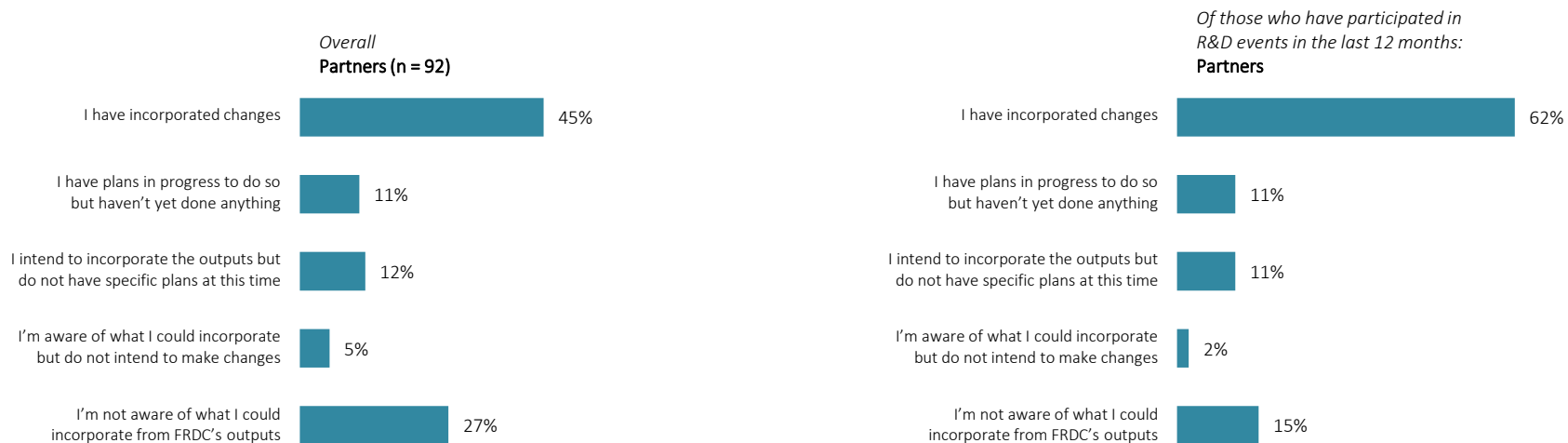
66%

Segments of Fishing & Aquaculture	Aquaculture (n = 101)	Commercial Wild Catch (n = 175)	Supply Chain (n = 65)	Indigenous (n = 19)	Recreational Fishers (n = 99)
<i>Overall:</i> Intend to or have made changes	39%	38%	38%	47%	39%
<i>Of those who have participated in R&D events in the last 12 months:</i> KPI 4 – Intend to or have made changes	71%	63%	67%	100%	50%

Changes due to FRDC outcomes

KPI 4

Thinking back over the last 3 years, have you incorporated any of FRDC’s R&D outputs in your work?
 Asked to all Partners respondents.



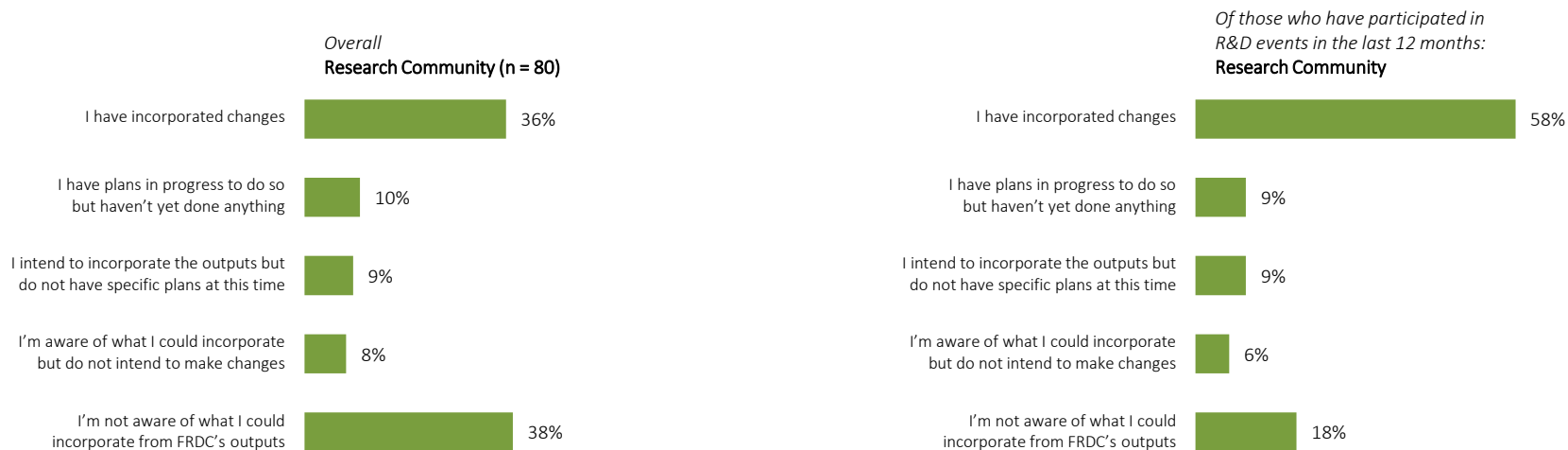
Intend to or have incorporated outputs 67%

KPI 4 - Intend to or have incorporated outputs 83%

Changes due to FRDC outcomes

KPI 4

Thinking back over the last 3 years, have you incorporated any of FRDC's R&D outputs in your work?
 Asked to all Research Community respondents.

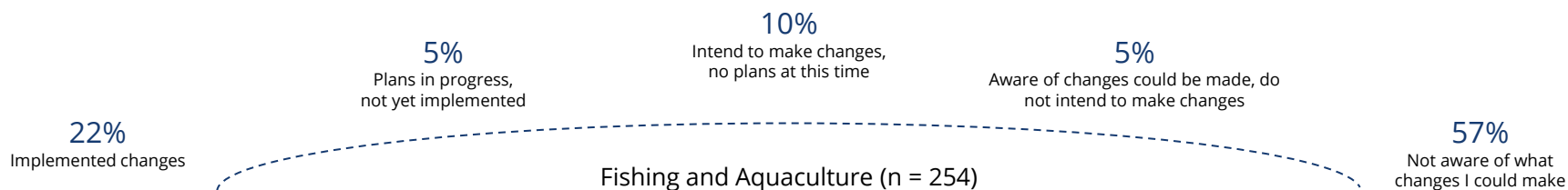


Intend to or have incorporated outputs 55%

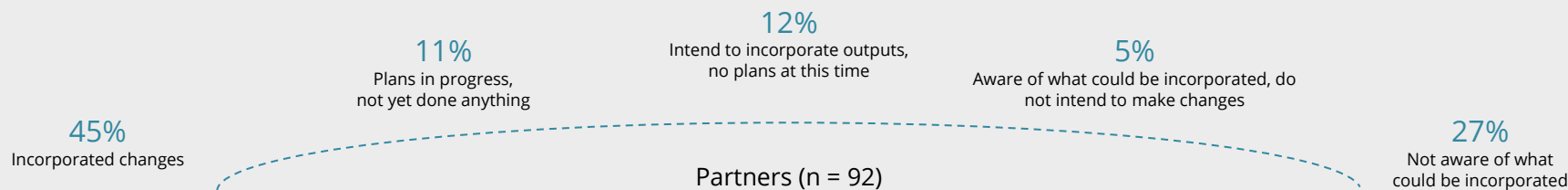
KPI 4 - Intend to or have incorporated outputs 76%

Changes due to FRDC outcomes

Thinking back over the last 3 years, have you made changes to your practices because of outcomes from any of the FRDC information, services or R&D projects?
 Asked to all Fishing and Aquaculture respondents.



Thinking back over the last 3 years, have you incorporated any of FRDC's R&D outputs in your work?
 Asked to all Partners and Research Community respondents.

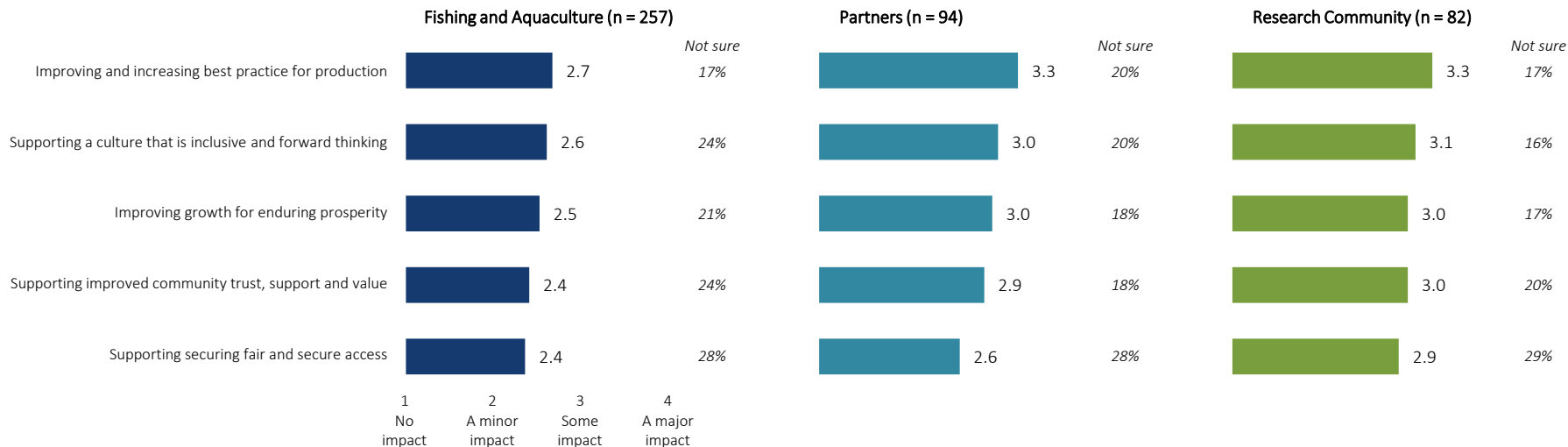


Results from 2020 and 2018*: 2020 – Not asked. 2018 Commercial Fishers – 47% “Yes I have”

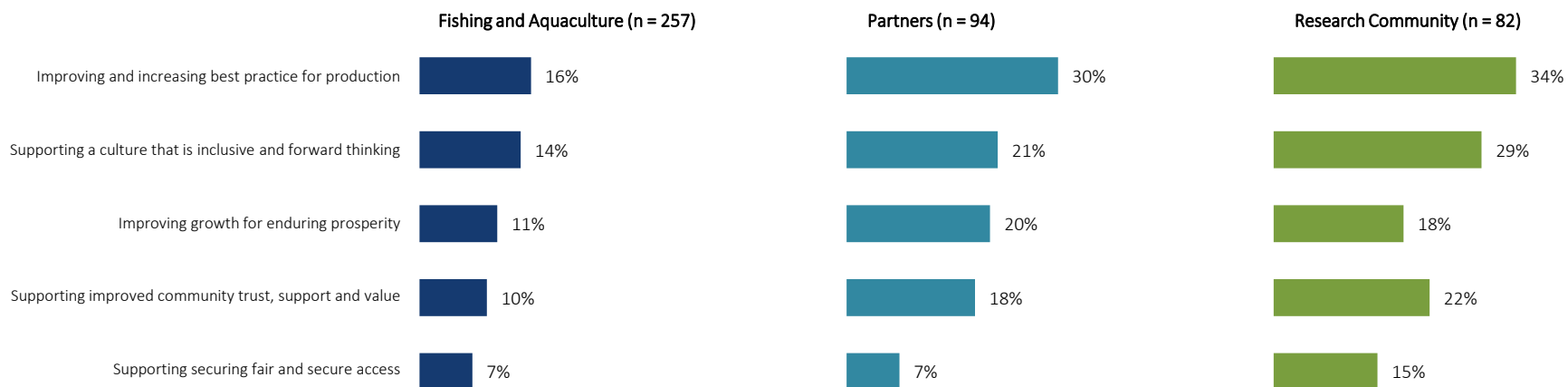
* Question asked: “In the last 12 months, have you used any information or findings from research to make changes in your fishing business?”. Question was asked on a binary scale of “Yes I have” and “No I haven’t”. Grouping of stakeholder audiences differ year on year. Please exercise caution when comparing 2022 results to 2018.

Impact of RD&E activities on the F&A industries

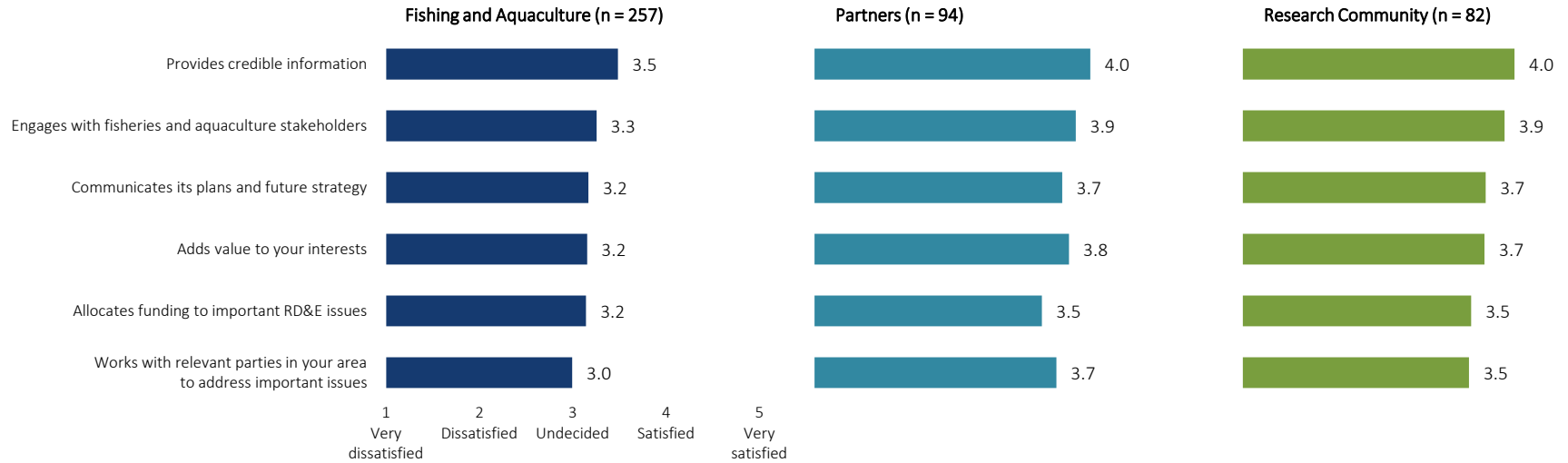
What impact, if any, do you think RD&E activities have had on the following areas for the Fishing and Aquaculture industries over the past 3 years?
 Asked to all respondents.



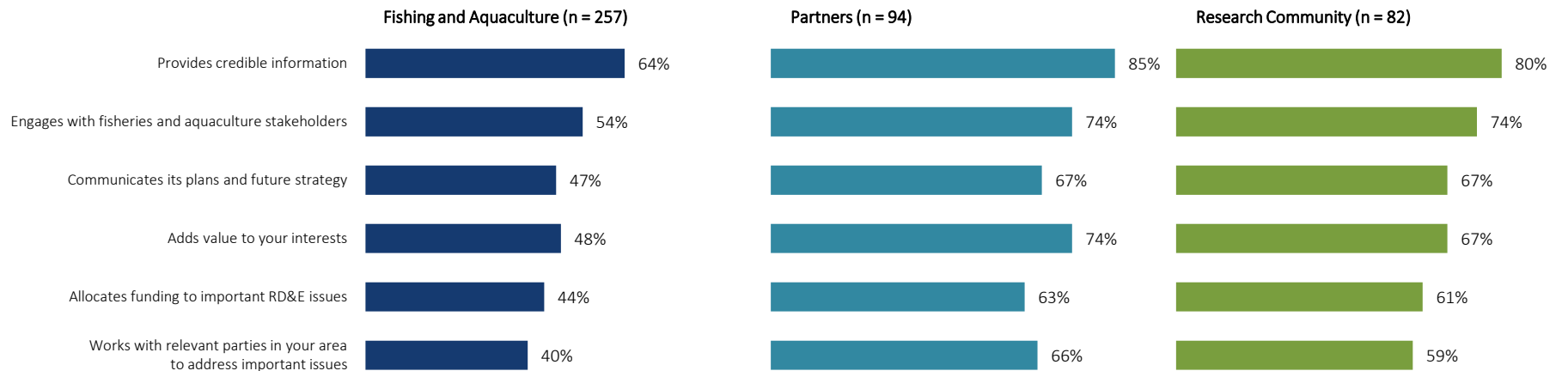
% of respondents rating “a major impact” for each of the following RD&E activities



How satisfied are you that FRDC...
 Asked to all respondents.

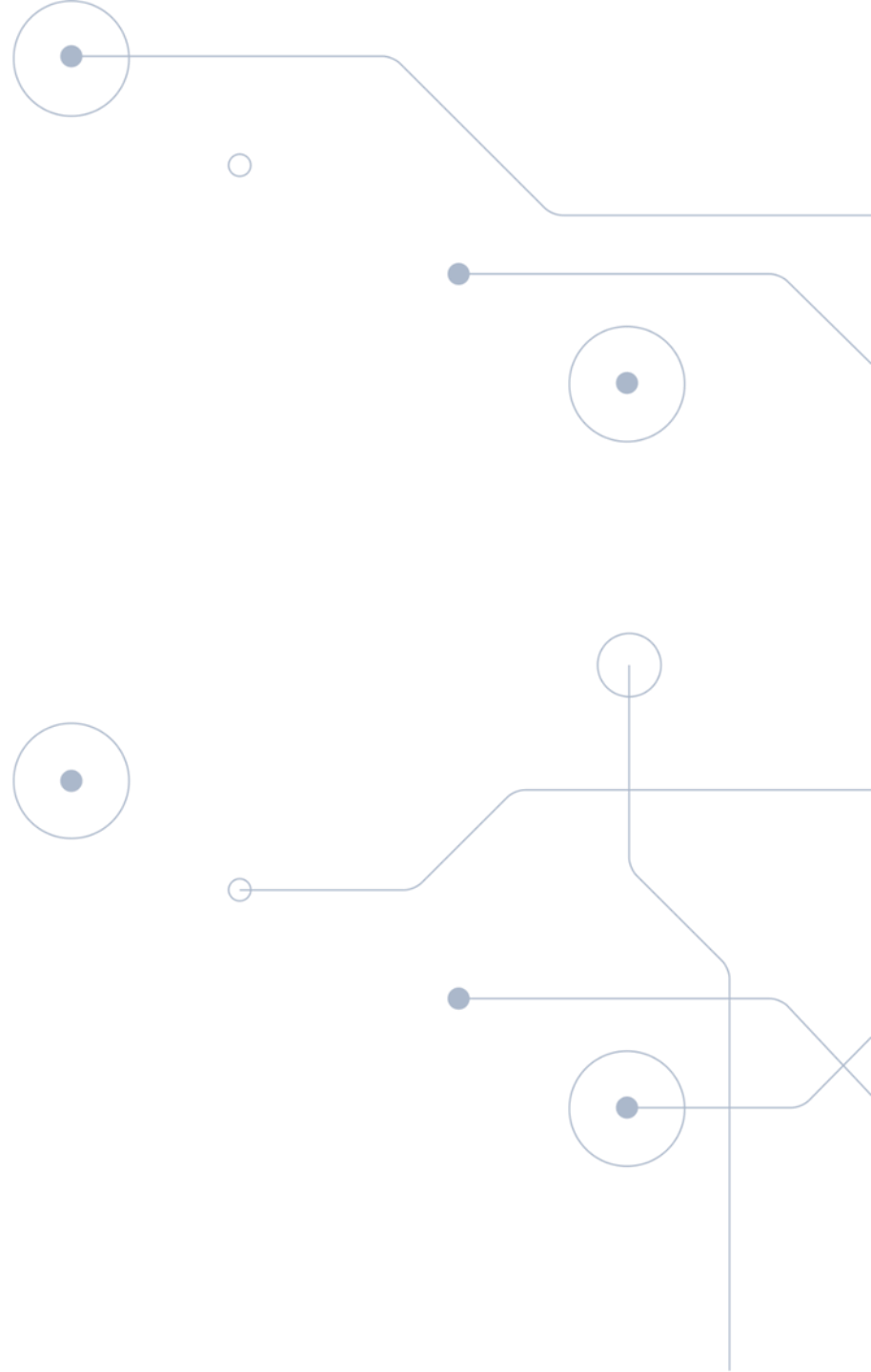


% of respondents rating “very satisfied” or “satisfied” for their satisfaction that FRDC does the following



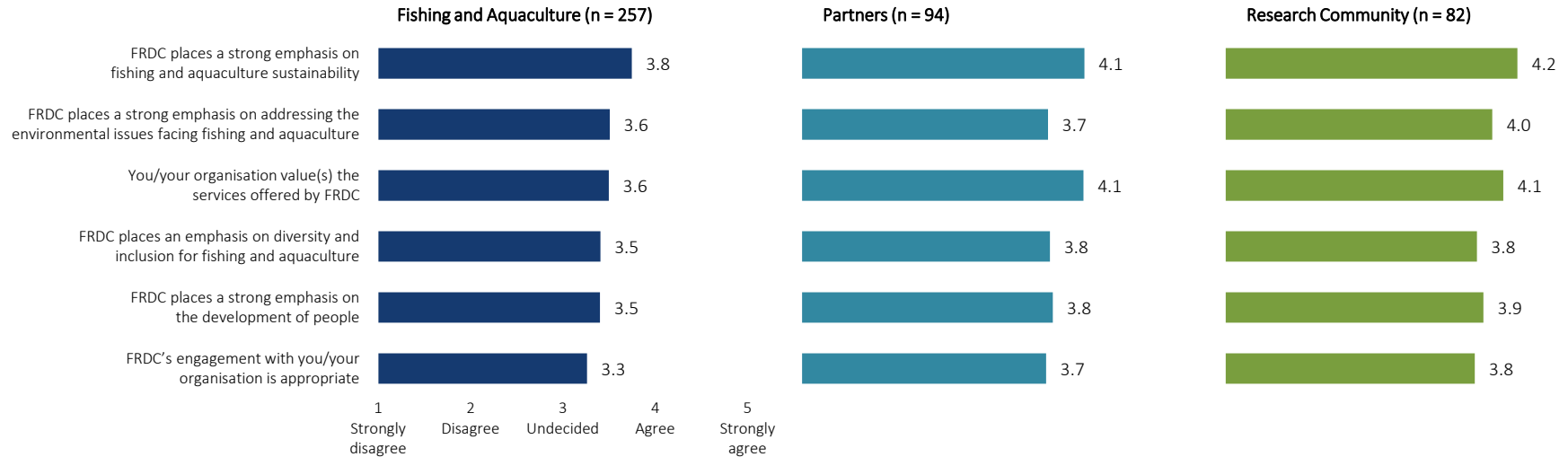


CRRDC KPIs

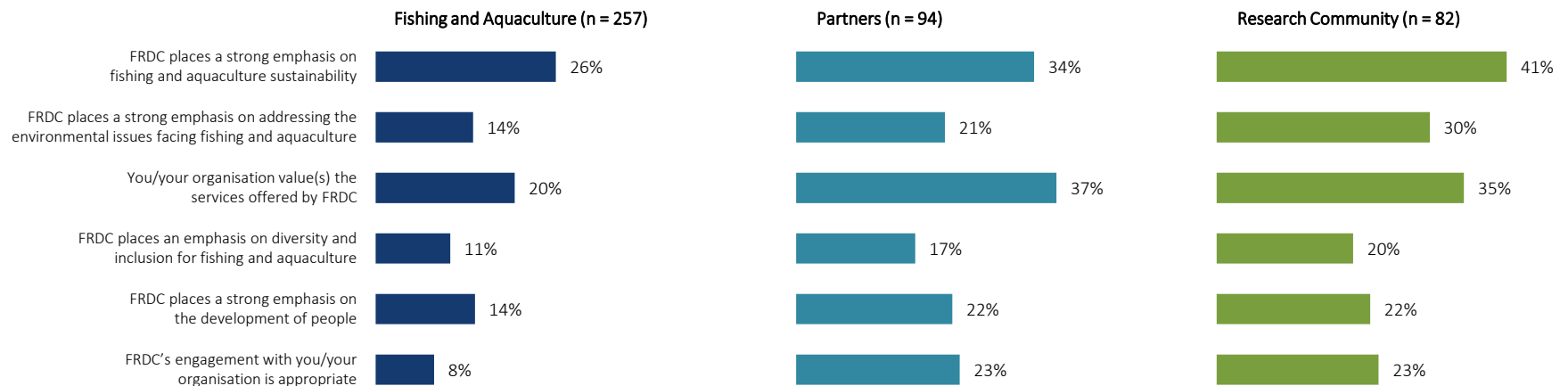


Based on your experience with FRDC over the past 12 months, would you agree or disagree that...

Asked to all respondents.



% of respondents rating "strongly agree" for each of the following statements about FRDC



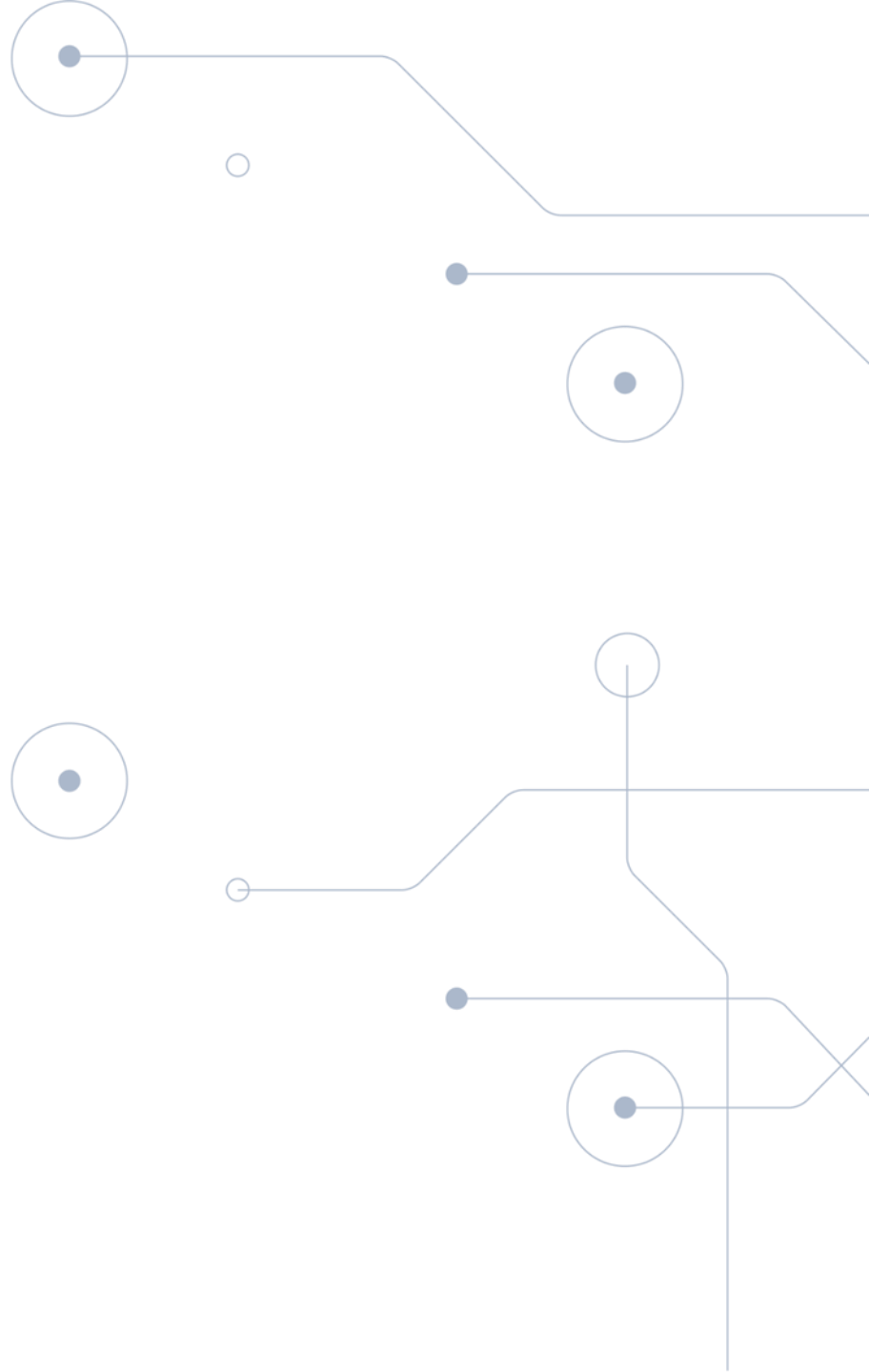
Based on your experience with FRDC over the past 12 months, would you agree or disagree that...
 Asked to all respondents.

	Fishing and Aquaculture (n = 257)			Partners (n = 94)			Research Community (n = 82)		
	% agree	% disagree	NETT	% agree	% disagree	NETT	% agree	% disagree	NETT
FRDC places a strong emphasis on fishing and aquaculture sustainability	74%	12%	+62	86%	5%	+81	88%	4%	+84
FRDC places a strong emphasis on addressing the environmental issues facing fishing and aquaculture	66%	16%	+50	66%	12%	+54	74%	7%	+67
You/your organisation value(s) the services offered by FRDC	59%	14%	+45	84%	7%	+77	80%	7%	+73
FRDC places an emphasis on diversity and inclusion for fishing and aquaculture	55%	13%	+42	66%	6%	+60	65%	5%	+60
FRDC places a strong emphasis on the development of people	53%	15%	+38	63%	5%	+57	68%	4%	+65
FRDC's engagement with you/your organisation is appropriate	54%	21%	+33	67%	15%	+52	71%	15%	+56

*NETT Agreeance is the difference between the proportion of agree responses and disagree responses.
 NETT Agreeance scores are measured with a single question and reported with a number from -100 to +100, where a higher score is desirable.



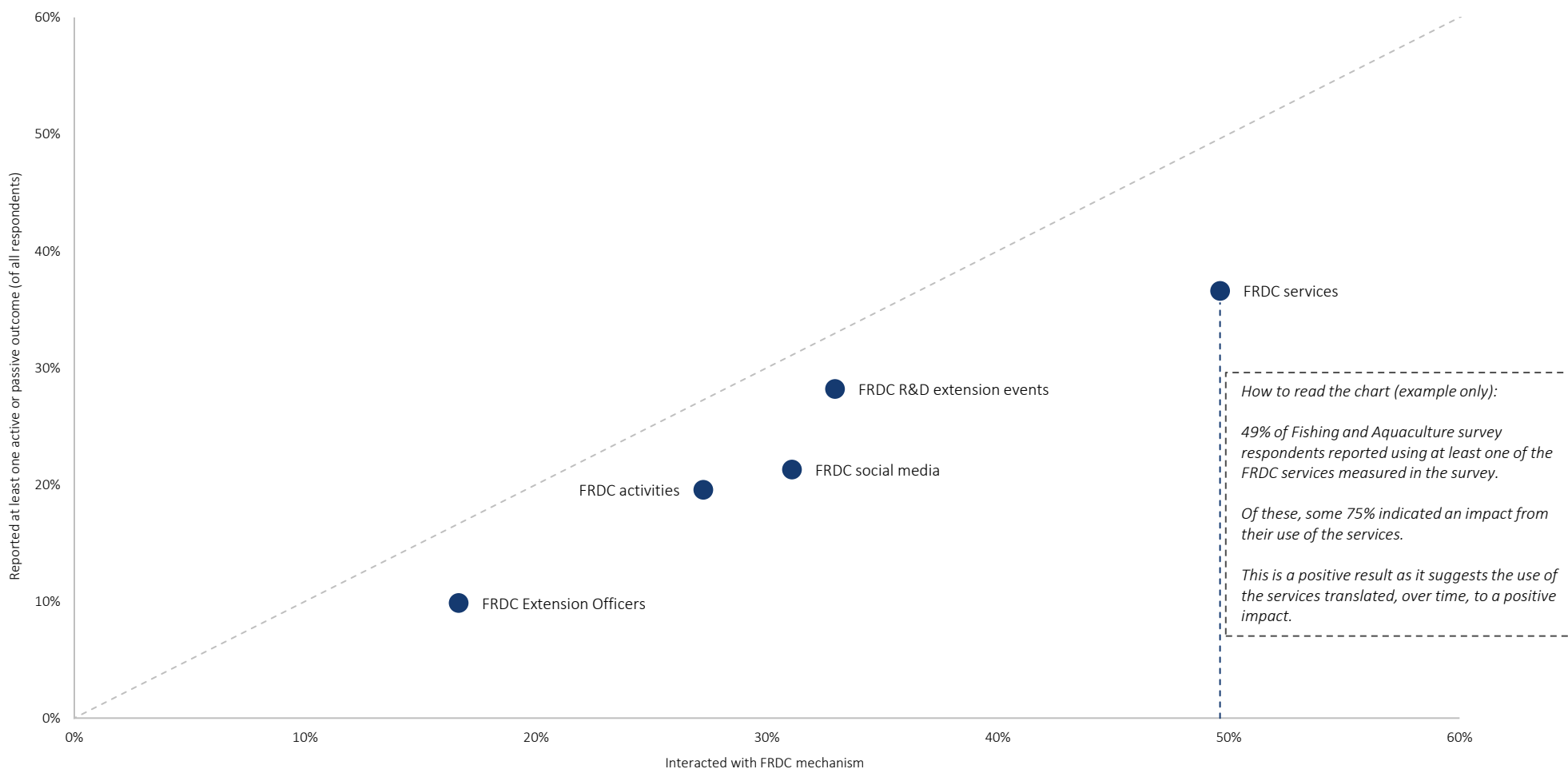
A summary of impact measures



An overview of the impact of FRDC engagement mechanisms: Fishing and Aquaculture

Across the 2022 Stakeholder Survey, respondents were asked to report on their awareness and involvement with various FRDC engagement mechanisms. A measure of the 'impact' of this involvement was also taken.

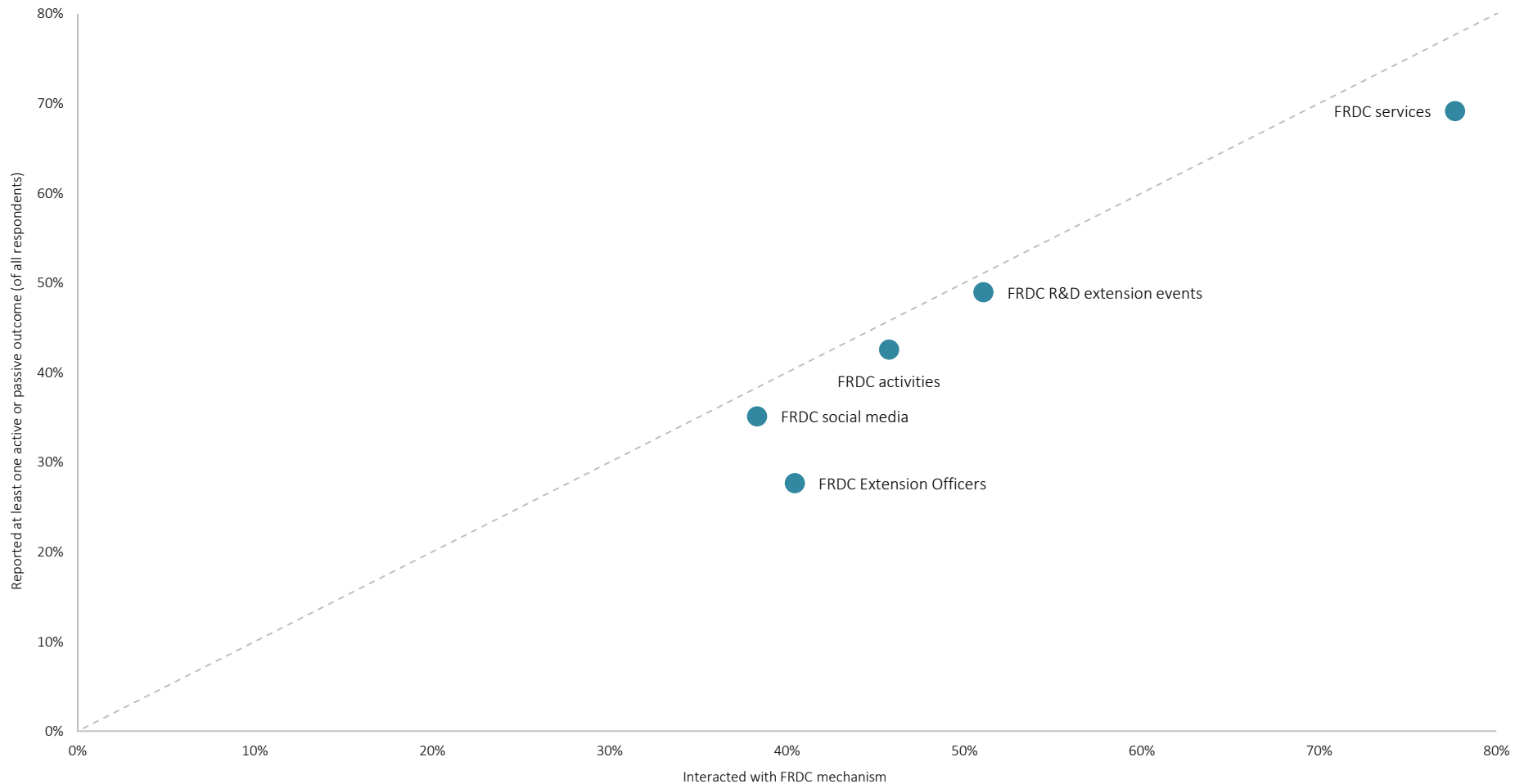
The chart below provides a high-level summary of these results for the Fishing and Aquaculture respondents.



An overview of the impact of FRDC engagement mechanisms: Partners

Across the 2022 Stakeholder Survey, respondents were asked to report on their awareness and involvement with various FRDC engagement mechanisms. A measure of the 'impact' of this involvement was also taken.

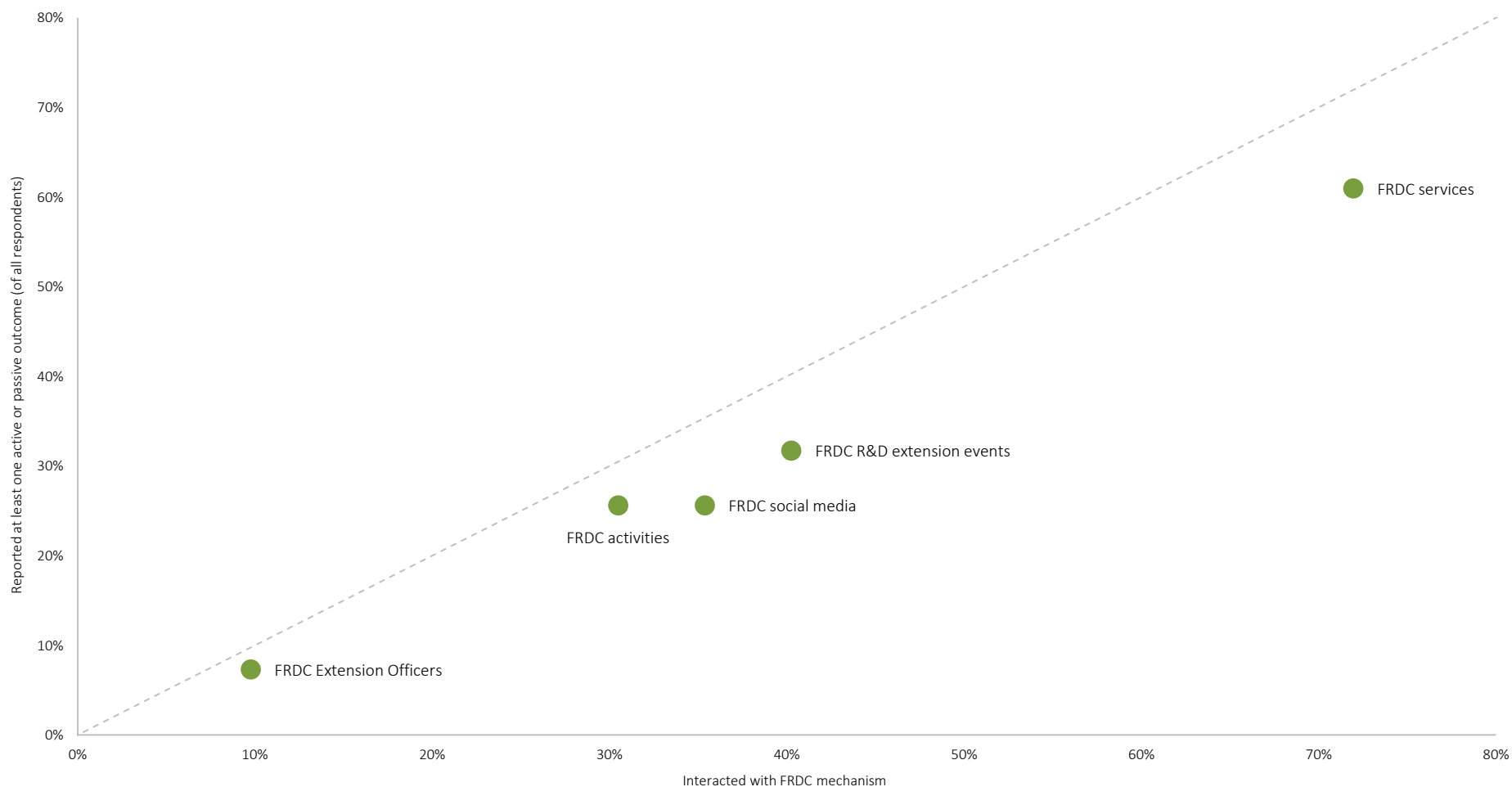
The chart below provides a high-level summary of these results for the Partner respondents.



An overview of the impact of FRDC engagement mechanisms: Research Community

Across the 2022 Stakeholder Survey, respondents were asked to report on their awareness and involvement with various FRDC engagement mechanisms. A measure of the 'impact' of this involvement was also taken.

The chart below provides a high-level summary of these results for the Research Community respondents.

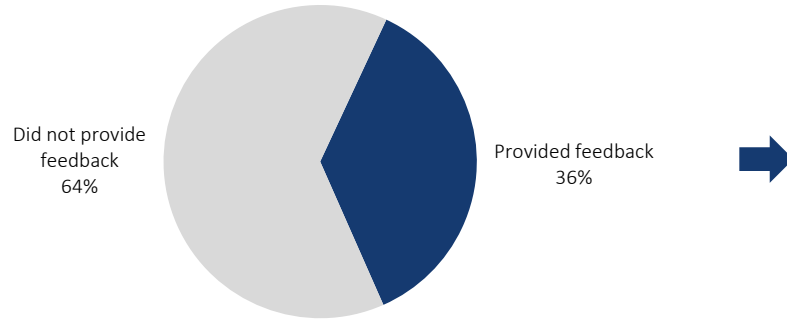




Appendices



Before we finish, are there any other feedback that you would like to pass onto FRDC? *
Asked to all respondents.



What did respondents say...
Reported if 2% or more

Feedback grouped into several 'themes'

- 9% - General positive feedback
- 7% - Feedback: Research investment, priorities
- 4% - Feedback: About FRDC the organisation
- 3% - Feedback: Comms and engagement
- 2% - Feedback: Fisheries management
- 2% - Feedback: Recreational fishing
- 2% - Feedback: Awareness, familiarity and knowledge
- 2% - Feedback: Industry rules and regulations

* This question was an open-ended verbatim feedback question. Please note that coding of the responses to this question is a subjective view on the responses received, and that all responses are reported together unweighted, regardless of stakeholder audience.

9% - General positive feedback

"I was recently contacted by the new NT Extension Officer. She appears competent and confident there may be some areas where she may be able to help ornamental aquatic life aquaculture. In the past there is very little positive interest in ornamental aquaculture by Government. They are usually very unhelpful but have become better in the past few years. I hope the FRDC may be able to help in the future. In the past I have not seen much from that organisation for my Aquaculture."

"The investment in the EON is a bold and strategically important decision that will pay dividends in both tangible impacts on research awareness and uptake and less tangible, but equally important impacts on capacity building etc. We are very grateful of the FRDC Board and leadership for your support of this important initiative given the importance of better-informed clients and stakeholders and the lack of marine literacy generally."

"I greatly appreciated participating in the National Seafood Industry Leadership Program and have recommended it to colleagues and friends. It would be great to see FRDC invest greater resources into building capacity and resolving important issues in the recreational sector, particularly given the participation nationally and the importance of being able to sustainably catch our own seafood in a changing climate."

"Since I last applied for funding under a listed FRDC priority (no projects under the priority were funded), my research has not been listed as a priority. After chatting with FRDC representatives at the recent ASFB, I am interested in further speaking with them about how my research could be supported by FRDC in the future, so I am very happy I made these connections."

4% - Feedback: About FRDC the organisation

"Once FRDC completes a research project, I am unaware how that research then adds any value to fisheries management. For example, do you provide it to Government agencies for their consideration, to industry peak bodies to use to lobby Government for greater access to resource or does the report just sit on a shelf and assist a University researcher gain their PHD?"

"FRDC has a wonderful history in R&D, but I am starting to wonder if their increased emphasis on investing in 'woke' issues is to the detriment of their 'old fashioned' R&D activities that benefit industry, fishermen and farmers."

"You're too busy with the big end of town and representatives that are self-interested. Until NSW has an elected representative group, will not participate in any organised group perceived to be representing the majority of fishermen."

7% - Feedback: Research investment, priorities

"Yes, way too much emphases of Aquaculture at the expense of the wild catch area. I would like real world outcomes and improvement to gear on processing on vessels as opposed to not going to the environment. Anything that survived in the 30 years survived. They were done and dusted in the 80's and the 90's. Take the efficiencies from agriculture to aquaculture, they will be in a better place."

"In light of all the pressures on resource access security posed by initiatives such as marine parks and marine wind farms, it is urgently critical that FRDC undertakes a high priority national project to determine and agree a methodology to value fishing licences and entitlements for the purposes of compensation from the loss of resource access."

"FRDC appears to work under a lens of development and extraction for improved economics. This was appropriate in past years however with the speed of global change, it is imperative that a more precautionary lens is applied that places regeneration at the forefront of achieving long-lasting sustainable seafood economies."

"Little emphasis on freshwater research. This may have to do with commercialisation focus on seafood and aquaculture, however the FRDC provides little R&D to freshwater systems that support the huge recreational fishing community. I have dropped the newsletter down the priority list to read as it is so seafood focused."

3% - Feedback: Comms and engagement

"They are not connecting with individual businesses, the normal people, possibly they need to have a good look at their board to include diversity and to have relevant knowledge. Improve the way in which they communicate, 40% of people in the fishing industry are illiterate. Without the people on the ground, they are not getting the full picture and not achieving all that they could be achieving."

"Not communicating directly to stakeholders like ourselves. Attitude of federal Government leaves a lot to be desired. That department needs a massive clean out. Prawn industry is a clear example of how my lying has gone on. Social media was pretty poor as well. I've never seen anything pop up or related to what we do on FB. Communicate with people in the industry, don't dictate."

"I would like someone to reach out to us and have a conversation on what they are/could do with us. Understand what could have been done with us so that we learn from the past and also what can/could we look towards the future with, not just in core areas that we work now."

"We need more consultation with the people that do the fishing, skippers/crew, rather than the people that own the licenses."

Which of the following sectors of the seafood industry do you operate in? Please select all that apply.	Fishing and Aquaculture (n = 257) *	Partners (n = 0)	Research Community (n = 0)
Commercial wild catch	69%	Not asked to this segment	Not asked to this segment
Aquaculture	40%	Not asked to this segment	Not asked to this segment
Processing	12%	Not asked to this segment	Not asked to this segment
Recreational fisher	11%	Not asked to this segment	Not asked to this segment
Wholesaler	10%	Not asked to this segment	Not asked to this segment
Exporter	9%	Not asked to this segment	Not asked to this segment
Importer	4%	Not asked to this segment	Not asked to this segment
Indigenous	4%	Not asked to this segment	Not asked to this segment
Retail	2%	Not asked to this segment	Not asked to this segment

Which of the following best describes your organisation? Please select all that apply.	Fishing and Aquaculture (n = 0)	Partners (n = 94)	Research Community (n = 0)
State/Territory Government department or agency	Not asked to this segment	69%	Not asked to this segment
Federal Government department or agency	Not asked to this segment	15%	Not asked to this segment
Fisheries Management	Not asked to this segment	10%	Not asked to this segment
Peak industry association	Not asked to this segment	10%	Not asked to this segment
National resource manager	Not asked to this segment	3%	Not asked to this segment
Not-for profit organisation	Not asked to this segment	2%	Not asked to this segment

Which of the following best describes your organisation? Please select all that apply.	Fishing and Aquaculture (n = 0)	Partners (n = 0)	Research Community (n = 82)
Private sector researcher	Not asked to this segment	Not asked to this segment	48%
Australian University	Not asked to this segment	Not asked to this segment	38%
Government Fisheries Organisation	Not asked to this segment	Not asked to this segment	11%
International Research Organisation	Not asked to this segment	Not asked to this segment	2%
TAFE	Not asked to this segment	Not asked to this segment	1%

Which of the following species categories do you operate in? Please select all that apply.	Fishing and Aquaculture (n = 254) *	Partners (n = 0)	Research Community (n = 0)
Crustaceans	52%	Not asked to this segment	Not asked to this segment
Finfish	52%	Not asked to this segment	Not asked to this segment
Molluscs	30%	Not asked to this segment	Not asked to this segment
Other	11%	Not asked to this segment	Not asked to this segment

Which states/territories do you operate in? Please select all that apply.	Fishing and Aquaculture (n = 254) *	Partners (n = 0)	Research Community (n = 0)
Queensland	30%	Not asked to this segment	Not asked to this segment
New South Wales	19%	Not asked to this segment	Not asked to this segment
Tasmania	18%	Not asked to this segment	Not asked to this segment
Western Australia	17%	Not asked to this segment	Not asked to this segment
South Australia	15%	Not asked to this segment	Not asked to this segment
Victoria	12%	Not asked to this segment	Not asked to this segment
Northern Territory	8%	Not asked to this segment	Not asked to this segment
Commonwealth	5%	Not asked to this segment	Not asked to this segment
Australian Capital Territory	<1%	Not asked to this segment	Not asked to this segment

How long have you been involved with FRDC in this role?	Fishing and Aquaculture (n = 0)	Partners (n = 92)	Research Community (n = 80)
More than 2 years	Not asked to this segment	87%	78%
1 year to 2 years	Not asked to this segment	5%	10%
6 to 12 months	Not asked to this segment	5%	4%
Less than 6 months	Not asked to this segment	2%	9%

Which gender do you identify with?	Fishing and Aquaculture (n = 257) *	Partners (n = 94)	Research Community (n = 82)
Male	86%	65%	62%
Female	13%	30%	34%
Non-binary	0%	1%	0%
Prefer not to say	1%	4%	4%

Which of the following age groups do you belong to?	Fishing and Aquaculture (n = 257) *	Partners (n = 94)	Research Community (n = 82)
18 to 24 years	0%	0%	0%
25 to 34 years	3%	9%	2%
35 to 44 years	15%	18%	13%
45 to 54 years	24%	35%	28%
55 to 64 years	29%	28%	27%
65 years and over	29%	11%	29%





Are you of Aboriginal or Torres Strait Islander origin?	Fishing and Aquaculture (n = 257) *	Partners (n = 94)	Research Community (n = 82)
No, not Aboriginal or Torres Strait Islander	93%	93%	94%
Yes, Aboriginal	4%	1%	2%
Yes, Torres Strait Islander	<1%	1%	0%
Yes, Aboriginal and Torres Strait Islander	1%	0%	0%
Don't know / prefer not to say	2%	5%	4%

What was your total revenue in the last financial year, ending June 30, 2022?	Fishing and Aquaculture (n = 251) *	Partners (n = 0)	Research Community (n = 0)
Less than \$1M	55%	Not asked to this segment	Not asked to this segment
\$1M to less than \$2M	12%	Not asked to this segment	Not asked to this segment
\$2M to less than \$5M	4%	Not asked to this segment	Not asked to this segment
\$5M to less than \$10M	5%	Not asked to this segment	Not asked to this segment
\$10M or more	12%	Not asked to this segment	Not asked to this segment
Prefer not to say	12%	Not asked to this segment	Not asked to this segment


Stakeholder Snapshot: Sub-group – Aquaculture

Sample size: n = 102



Key metrics

	38%	% satisfied that financial contributions to FRDC are being invested wisely and benefit the fishing and aquaculture sectors and the Aus community
	-15	Net Promoter Score
	49%	% agree that FRDC is transparent in how it communicates the impacts of R&D it has supported
	39%	Intend to or have made changes to practices because of outcomes from FRDC info, services or R&D projects over the last 3 years

Industry sentiment

	+53	NETT Sentiment of the future of Aus fishing / aquaculture industry over the next 12 months (scale of -100 to +100)
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FRDC roles and responsibilities

	56%	% who understand very well or fairly well what FRDC's roles and responsibilities are
	40%	% who recall all four FRDC responsibilities and roles (when prompted with a list)

FRDC mechanisms and outcomes

Interaction with FRDC mechanism	Did this	Reported an outcome *
Used at least one FRDC service	50%	73%
Involved in at least one activity	30%	71%
Participated in at least one R&D event	34%	91%
Interacted with the Extension Officers	15%	47%
Looked at FRDC social media	35%	69%

Statements about FRDC





	% agree	
FRDC places a strong emphasis on fishing and aquaculture sustainability	80%	
FRDC places a strong emphasis on addressing the environmental issues facing fishing and aquaculture	71%	
You/your organisation value(s) the services offered by FRDC	65%	
FRDC places an emphasis on diversity and inclusion for fishing and aquaculture	59%	
FRDC's engagement with you/your organisation is appropriate	57%	
FRDC places a strong emphasis on the development of people	57%	

*Reported an outcome: Interaction with the FRDC mechanism led to one or more of the following outcomes: adoption of R&D, an increase in your knowledge on a particular issue, facilitated new thinking or ideas on a particular issue, lead to you communicating R&D to others, lead to you being connected to other potential partners.


Stakeholder Snapshot: Sub-group – Commercial wild catch

Sample size: n = 177



Key metrics

	39%	% satisfied that financial contributions to FRDC are being invested wisely and benefit the fishing and aquaculture sectors and the Aus community
	-38	Net Promoter Score
	46%	% agree that FRDC is transparent in how it communicates the impacts of R&D it has supported
	38%	Intend to or have made changes to practices because of outcomes from FRDC info, services or R&D projects over the last 3 years

Industry sentiment

	-1	NETT Sentiment of the future of Aus fishing / aquaculture industry over the next 12 months (scale of -100 to +100)
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FRDC roles and responsibilities

	63%	% who understand very well or fairly well what FRDC's roles and responsibilities are
	40%	% who recall all four FRDC responsibilities and roles (when prompted with a list)

FRDC mechanisms and outcomes

Interaction with FRDC mechanism	Did this	Reported an outcome *
Used at least one FRDC service	54%	77%
Involved in at least one activity	24%	76%
Participated in at least one R&D event	33%	83%
Interacted with the Extension Officers	18%	78%
Looked at FRDC social media	27%	64%

Statements about FRDC





	% agree	
FRDC places a strong emphasis on fishing and aquaculture sustainability	71%	
FRDC places a strong emphasis on addressing the environmental issues facing fishing and aquaculture	61%	
You/your organisation value(s) the services offered by FRDC	55%	
FRDC places an emphasis on diversity and inclusion for fishing and aquaculture	54%	
FRDC's engagement with you/your organisation is appropriate	52%	
FRDC places a strong emphasis on the development of people	52%	

*Reported an outcome: Interaction with the FRDC mechanism led to one or more of the following outcomes: adoption of R&D, an increase in your knowledge on a particular issue, facilitated new thinking or ideas on a particular issue, lead to you communicating R&D to others, lead to you being connected to other potential partners.

Stakeholder Snapshot: Sub-group – Supply chain

Exporter / Importer / Processing / Wholesaler. Sample size: n = 68


Key metrics

	35%	% satisfied that financial contributions to FRDC are being invested wisely and benefit the fishing and aquaculture sectors and the Aus community
	-26	Net Promoter Score
	51%	% agree that FRDC is transparent in how it communicates the impacts of R&D it has supported
	38%	Intend to or have made changes to practices because of outcomes from FRDC info, services or R&D projects over the last 3 years







FRDC mechanisms and outcomes

Interaction with FRDC mechanism	Did this	Reported an outcome *
Used at least one FRDC service	56%	71%
Involved in at least one activity	24%	75%
Participated in at least one R&D event	35%	88%
Interacted with the Extension Officers	10%	100%
Looked at FRDC social media	32%	59%



Industry sentiment

	+16	NETT Sentiment of the future of Aus fishing / aquaculture industry over the next 12 months (scale of -100 to +100)
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Statements about FRDC

	% agree	
FRDC places a strong emphasis on fishing and aquaculture sustainability	75%	
FRDC places a strong emphasis on addressing the environmental issues facing fishing and aquaculture	63%	
FRDC places an emphasis on diversity and inclusion for fishing and aquaculture	63%	
FRDC places a strong emphasis on the development of people	59%	
FRDC's engagement with you/your organisation is appropriate	56%	
You/your organisation value(s) the services offered by FRDC	54%	

FRDC roles and responsibilities





	71%	% who understand very well or fairly well what FRDC's roles and responsibilities are
	44%	% who recall all four FRDC responsibilities and roles (when prompted with a list)

*Reported an outcome: Interaction with the FRDC mechanism led to one or more of the following outcomes: adoption of R&D, an increase in your knowledge on a particular issue, facilitated new thinking or ideas on a particular issue, lead to you communicating R&D to others, lead to you being connected to other potential partners.

Stakeholder Snapshot: Sub-group – Indigenous

Sample size: n = 20


Key metrics

	30%	% satisfied that financial contributions to FRDC are being invested wisely and benefit the fishing and aquaculture sectors and the Aus community
	-38	Net Promoter Score
	30%	% agree that FRDC is transparent in how it communicates the impacts of R&D it has supported
	47%	Intend to or have made changes to practices because of outcomes from FRDC info, services or R&D projects over the last 3 years







FRDC mechanisms and outcomes

Interaction with FRDC mechanism	Did this	Reported an outcome *
Used at least one FRDC service	35%	100%
Involved in at least one activity	30%	50%
Participated in at least one R&D event	35%	43%
Interacted with the Extension Officers	30%	83%
Looked at FRDC social media	25%	40%



Industry sentiment

	+30	NETT Sentiment of the future of Aus fishing / aquaculture industry over the next 12 months (scale of -100 to +100)
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Statements about FRDC

	% agree	
FRDC places a strong emphasis on fishing and aquaculture sustainability	65%	
You/your organisation value(s) the services offered by FRDC	60%	
FRDC places a strong emphasis on addressing the environmental issues facing fishing and aquaculture	55%	
FRDC places an emphasis on diversity and inclusion for fishing and aquaculture	50%	
FRDC places a strong emphasis on the development of people	40%	
FRDC's engagement with you/your organisation is appropriate	35%	

FRDC roles and responsibilities





	65%	% who understand very well or fairly well what FRDC's roles and responsibilities are
	45%	% who recall all four FRDC responsibilities and roles (when prompted with a list)

*Reported an outcome: Interaction with the FRDC mechanism led to one or more of the following outcomes: adoption of R&D, an increase in your knowledge on a particular issue, facilitated new thinking or ideas on a particular issue, lead to you communicating R&D to others, lead to you being connected to other potential partners.


Stakeholder Snapshot: Sub-group – Rec Fisher ONLY

Sample size: n = 114



Key metrics

	43%	% satisfied that financial contributions to FRDC are being invested wisely and benefit the fishing and aquaculture sectors and the Aus community
	-10	Net Promoter Score
	54%	% agree that FRDC is transparent in how it communicates the impacts of R&D it has supported
	39%	Intend to or have made changes to practices because of outcomes from FRDC info, services or R&D projects over the last 3 years

Industry sentiment

	+30	NETT Sentiment of the future of Aus fishing / aquaculture industry over the next 12 months (scale of -100 to +100)
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FRDC roles and responsibilities

	67%	% who understand very well or fairly well what FRDC's roles and responsibilities are
	42%	% who recall all four FRDC responsibilities and roles (when prompted with a list)

FRDC mechanisms and outcomes

Interaction with FRDC mechanism	Did this	Reported an outcome *
Used at least one FRDC service	53%	85%
Involved in at least one activity	7%	75%
Participated in at least one R&D event	14%	94%
Interacted with the Extension Officers	6%	71%
Looked at FRDC social media	29%	64%

Statements about FRDC

	% agree	
FRDC places a strong emphasis on fishing and aquaculture sustainability	76%	
FRDC places a strong emphasis on addressing the environmental issues facing fishing and aquaculture	74%	
You/your organisation value(s) the services offered by FRDC	69%	
FRDC places an emphasis on diversity and inclusion for fishing and aquaculture	66%	
FRDC's engagement with you/your organisation is appropriate	63%	
FRDC places a strong emphasis on the development of people	47%	

*Reported an outcome: Interaction with the FRDC mechanism led to one or more of the following outcomes: adoption of R&D, an increase in your knowledge on a particular issue, facilitated new thinking or ideas on a particular issue, lead to you communicating R&D to others, lead to you being connected to other potential partners.

Research design A strong and mature relationship between FRDC and its stakeholders, which acknowledges FRDC’s goals but at the same time the operating pressures stakeholders confront, underpins the pathway to success for the FRDC Strategic Plan. FRDC have identified the need to measure the engagement and satisfaction of a range of its key stakeholders. The 2022 Stakeholder Survey provides the mechanism to collect feedback and provide FRDC with measures of the health of their stakeholder relationships and the perception of progress against the Strategic Plan targets.

Target audiences As identified above, there are four broad stakeholder audiences for this research (of which three are reported on within this document):

1. The Industry – These stakeholders cover four main sectors of fishing (aquaculture, commercial wild catch, Indigenous and recreational), plus supply chain partners (exporters/importers, processors). Stakeholders may cross over sectors - for example, Indigenous fishers may participate in customary fishing, conduct aquaculture and commercial fishing, and fish recreationally.
2. The Partners – There are several different organisational partners FRDC collaborates with and relies upon. This includes Federal, State and Territory governments, the relevant departments, and fisheries and national resource managers.
3. The Research Community - R&D is only possible through investment in research. The research is supported and driven by FRDC’s research community, including researchers from universities, government fisheries organisations, further education organisations (e.g. TAFE), international research organisations and private-sector research providers.
4. The Australian Community - They are the ‘owners’ of the resources the industry uses to create and sustain Australia’s fishing and aquaculture sectors. This also includes an important cohort of seafood consumers.

Methodology Given the challenge of collecting feedback from the FRDC stakeholder audiences, a hybrid mixed mode methodology was used. This involved an email initial invitation sent to a supplied list of stakeholders across Industry, Partners and Research Community inviting them to complete the survey online. This process was then supplemented with computer assisted telephone interviews (CATI) among stakeholders. The supplementary process was aimed to ‘top up’ the number of interviews in this key stakeholder audience.

Questionnaire The 2022 FRDC Stakeholder Research involved a 17-minute questionnaire of up to 35 questions. This measured, amongst other things:

- Stakeholder sentiment
- CRRDC KPI’s
- Feedback on FRDC services
- Feedback on the FRDC Extension Officer Network (EON)
- Communications from FRDC
- FRDC key indicators
- Respondent profiles
- Voice of the stakeholder

Sample and Response A sample list of stakeholders for this research was provided by FRDC. In total, n = 433 interviews were completed with stakeholders. This included:

- n = 257 Fishing and Aquaculture (stakeholder must be involved in at least one of the Aquaculture or Commercial Wild Catch industries);
- n = 94 Partners; and
- n = 82 Research Community.

Timing The data collection for the 2022 FRDC Stakeholder Research was undertaken between the 3rd November 2022 to the 30th November 2022.

Weighting For the Fishing and Aquaculture stakeholder audience, data were weighted such that the results reflected a 50/50 split of Aquaculture and Commercial Wild Catch respondents. No weighting was used for the Partner and Research Community stakeholder audiences.

2022 FRDC Stakeholder Research January 2023

This survey was conducted by Intuitive Solutions on behalf of FRDC.



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Intuitive Solutions is an independent market research supplier and member of The Research Society (formerly AMSRS). This survey was conducted under The Research Society code of conduct.

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