

Fisheries Research & Development Corporation (FRDC) 2011 Stakeholder Tracking

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Acknowledgements

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Management Summary

the context for the research

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

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

It is important then that FRDC regularly measure the success of its engagement with these important stakeholders. The objective of this research was then to gauge perceptions, attitudes and behaviours of these industry stakeholders to FRDC and important to the research and development undertaken as a result of the contributions by industry.

The stakeholder survey now represents the third such undertaking by FRDC, with the previous two being conducted in 2007 and 2009. For this survey, a telephone survey among identified stakeholders was undertaken in September 2011. The list of respondents to the survey was provided by FRDC, which sourced the contact names from key industry associations and bodies.

A brief summary of the key findings from the research now follows.

stakeholders are currently cautious about the future of the industry

Stakeholders were asked about their views on the future of the industry and their business over the next 12 months. On both measures there was a degree of cautiousness reported with:

- Only slightly more stakeholders (43%) positive about the future of the industry than were negative (37%), providing an overall index of +7%; while
- Slightly more positivism was reported by stakeholders when responding to the outlook of their own businesses (index +19%).

Overall then, it is evident that stakeholders are somewhat uncertain and cautious about the next 12 months for the industry. These results come against a backdrop of a sharp decline in confidence across agriculture generally.

Management Summary

stakeholders' concern over the public perception of the fishing industry is clearly evident

An overwhelming 87% of stakeholders reported that they were concerned with the public perceptions of the fishing industry. With public perceptions on their radar, concerns were related to:

- The obvious linkage between public perceptions of fishing and demand for seafood products;
- Concerns about the perceived ignorance of the public of the fishing industry, including the efforts the industry has gone to achieve sustainability and the tight and far reaching controls that Government currently places on the industry;
- Concerns about the current perception of the industry – a number of stakeholders described the public as believing the industry 'raped and pillaged' fish stocks.
- The linkages between public perceptions and Government regulation and policy;
- The lack of a 'voice' for the industry to address some of the misinformation currently shaping perceptions.

the FRDC key performance results

With a view to continuing measurement of the key metrics from previous stakeholder studies we note the current measures reported in the 2011 study. Please note that in a number of circumstances the measures used in the 2011 study were conducted differently. The results show that:

- Prompted awareness has remained largely static, up slightly from the 2008 result;
- Similarly spontaneous awareness of FRDC has remained largely unchanged from the 2008 result
- Knowledge of FRC has fallen slightly although we would note the 2011 study was not a self reported measure but an analysis of the role description provided by stakeholders. This is we believe a more robust measure of the knowledge indicator.
- The 'performance' rating although slightly lower remains largely consistent with the 2008 result.

Key Performance Targets	2005	2006	2008	2011
Unprompted awareness of FRDC	47%	48%	34%	36%
Prompted awareness of FRDC	87%	92%	85%	88%
Overall performance rating of FRDC	58%	65%	51%	61%
Knowledge of FRDC	60%	62%	44%	36%

It is recommended that FRDC review its focus on these key result areas and going forward explore opportunities to measure and monitor results that will be more relevant to the success of its engagement with stakeholders.

Industry acknowledges the importance of having an organisation like FRDC

One of the measures collected in the study was feedback on stakeholders' views of the importance of having an organisation like FRDC. While this did not speak to an evaluation of the perceived 'performance' of the organisation in terms of its R&D investments it looked to a measure of the more fundamental support for the concept of the RDC driving and managing R&D across the industry.

The results point to a strong level of support (rating 7.8 out of a possible 10), from stakeholders about the importance for the industry to have an organisation like FRDC with:

- o More than six in ten stakeholders rating the importance at 10 (out of a possible 10);
- o About two in three being likely 'advocates' with a rating of 8+;
- o Less than one in ten (9%) being likely 'antagonists' with a rating between 0-4 a result suggesting they remain unconvinced of the need for or role of an organisation like FRDC.

Our experience with other RDC's points to this measure as being a key indicator of engagement with RDCs. Reshaping stakeholders views around the role and responsibilities for the FRDC is an important determination of their likely future engagement with the organisation.

the FRDC name is recognised but opportunity exists to strengthen stakeholders' knowledge of the role and responsibilities of FRDC

The 2011 results indicate that there are three clusters of stakeholders:

- o Firstly, a small groups of stakeholders who are simply not aware of FRDC and as a result not familiar with the name or the organisation (12%)
- o Secondly, a much large proportion of stakeholders (52%) who have heard of the FRDC name but are simply unable to provide a reasonable reliable description of what FRDC's roles is; and
- o Thirdly, about one in three stakeholders (36%) ho have a much clearer understanding of who FRDC is, their role and responsibility. It is these stakeholders who appear fully engaged.

The results point to a quite different engagement with FRDC between these three clusters of stakeholders. Right now there appears to be a significant challenge to better inform , educate and shape perceptions with the majority of stakeholders (the 52%) who are aware but unfamiliar with FRDC. This should be the focus for FRDC going forward.

While it has previously been recommended this may be best achieved through industry associations, the evidence from and experience of other RDCs would indicate that this is unlikely to generate the improvements required by FRDC and that a more direct one to one engagement will be required. FRDC should examine opportunities to create a direct channel of engagement with these stakeholders which will provide the opportunities to communicate appropriate messaging. This approach has been successfully used by other RDCs including dairy and grains.

satisfaction with 'performance' the investment and managing of R&D

Perhaps not surprisingly there was a lower level of satisfaction (rating 5.4 out of a possible 10) across all stakeholders that the contributions made by stakeholders was being invested wisely.

In reviewing this result, it is important to note that:

- Satisfaction was lowest among those who recognised the name but were unfamiliar with the role of FRDC (rating 4.8); while
- Satisfaction was substantially stronger among stakeholders who were aware and familiar with FRDC (rating 6.1). Among this group of stakeholders we note satisfaction was:
 - Higher in regards FRDC explaining where the investments are being made (6.4) and in being provided an opportunity to be 'involved' (6.2); but
 - Lower in regards where the investments are being made (5.4) and in regards being provided an opportunity to 'have a say' in where investments are made (5.9)

Once again where stakeholders have a greater knowledge and understanding of FRDC, there is a stronger appreciation of the investment 'performance'. For many stakeholders, their preferences for R&D investment are narrowly focused on their sector. Ensuring an appropriate balance of investment across sectors and on key focus areas will as a result disappoint some stakeholders. Managing these expectations will remain an ongoing challenge for FRDC.

So where do stakeholder see opportunities for strengthening FRDC's service to the industry?

Perhaps not surprisingly there was a diverse response from stakeholders on where FRDC could improve and strengthen its service to the industry. The range of issues mentioned reflect the previously identified lack of role clarity for FRDC across many stakeholders. With this in mind, the issues raised by stakeholders included mentions of:

- More industry led projects and industry generated research on issues relevant and of importance to the industry; indicating that either this is an issue or stakeholders are simply not aware of industry's involvement in the identification and framing of research projects;
- Stronger linkages between the research and business profitability;
- Better engagement with industry - - there was feedback indicating FRDC should look for opportunities to better educate and inform the industry on who FRDC is and what they are responsible for; this included a discussion regarding providing easier access to information on and research from the research projects;
- A greater level of investment in marketing and promotion of the industry;
- Rebalance efforts towards the smaller operators in industry – an indication that for some stakeholders there was a view that there is too much focus directed towards the very large businesses; and
- More effective lobbying of Governments on key issues. Clearly this sits outside the current charter of FRDC and again reflects some confusion on the role of FRDC.

seafood marketing: stakeholders' response

The opportunity to discuss potential operating frameworks for seafood marketing was taken during this exercise. Briefly, stakeholders were asked to provide feedback on a model which might see FRDC extend its services to seafood marketing. To support this an additional marketing levy may be likely to support the activities and initiatives undertaken on behalf of the industry.

Feedback from stakeholders indicates that:

- There is a mixed response to whether stakeholders believe there is a natural fit between FRDC and seafood marketing. This result underpins the criticality of a establishing a very clear positioning and role for FRDC should this extended role be undertaken.
- Stakeholders were largely unaware (62%) of any other organisations who were 'in this space;' and might already be involved with the broad industry marketing of seafood.
- Almost two in three reported that seafood importers should definitely contribute to the marketing costs. While this would indicate strong support for this approach, there were one in four (26%) who rejected the proposition. Again the mixed results point to a necessarily cautious approach to this specific issue should be adopted by FRDC.
- Just over one in two were supportive of an imposed levy on a levy across the whole industry for the support of initiatives and efforts involved in seafood marketing. Clearly then there was a lower appetite for an additional levy being added to fishers costs. Clearly a strong proposition (including details on the benefits) will likely be required to encourage a warmer response to contributing an additional levy for marketing.

So, while the concept is still just at a discussion point, there are clearly some strong indications around various aspects of the concept.

A detailed presentation of all results from the 2011 FRDC stakeholder tracking study now follows.



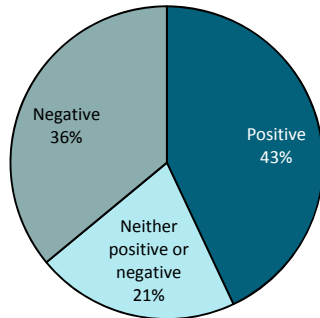
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stakeholder sentiment

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

Base: 145



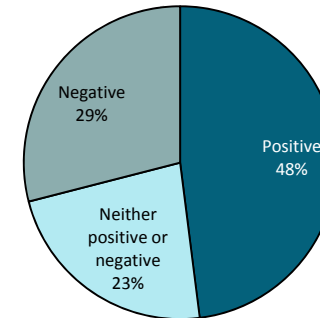
Positive	43%
Negative	36%
Sentiment Index	+7%

Stakeholders feedback suggest a greater level of confidence in their own business than the fishing industry at large.

The sentiment index suggest overall there is only a moderate sense of optimism about the next 12 months.

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

Base: 145



Positive	48%
Negative	29%
Sentiment Index	+19%

Across all agriculture a similarly pessimistic outlook. . . .

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



Source: Rabobank Rural Confidence survey, September 2011

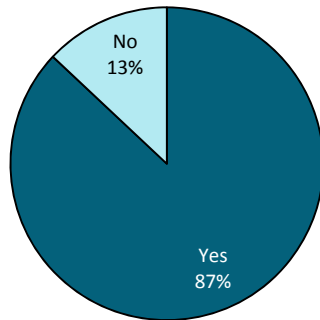
What we asked:

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

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

Is the general public's perception of the fishing industry something that you care for or are concerned about?

Base: 145



Like their recreational fisher counterparts, FRDC stakeholders are keenly tuned in and concerned about the public's perception of the fishing industry.

The overwhelming majority of stakeholders reported being concerned about the public's perception of the industry. When asked mention was made of:

- The fact that the public are the consumers and so ensuring they are comfortable and in alignment with the industry is critical to the ensuring demand remains strong.
- Concern about the ignorance the public has about the fishing industry. A number of stakeholders made mention of concerns that views and perceptions are being formed from misinformation and sources like overseas television shows.
- That the public doesn't understand or appreciate the difference between Australian harvested and imported products.
- The fragility of demand – mention was made of the public's sensitivities around any health related concerns and the immediate impact this can have on a sector.
- That the public simply doesn't understand nor appreciate the efforts the industry has gone to ensure it is sustainable.
- Concern for the poor image of the industry – repeated descriptions of the view that the public saw the industry 'raping and pillaging' were made with the emotive language underpinning the gravity of concerns in this areas.
- Lack of the public's awareness of the tight Government rules and regulations of the fishing industry.
- Lack of strong representation for the industry as a whole – no one standing to address these general concerns.
- The strong linkages between public perceptions and Government policy, and as a result the need to engage and connect to the general public.

What we asked:

Is the general public's perception of the fishing industry something that you care for or are concerned about?

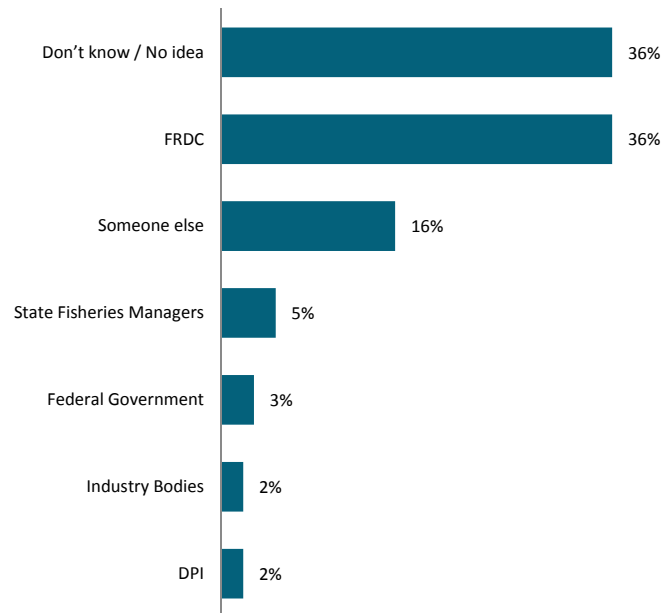


stakeholder awareness of FRDC

UNPROMPTED AWARENESS

Which organisation is responsible for managing and investing in National Research and Development across the Australian fishing industry?

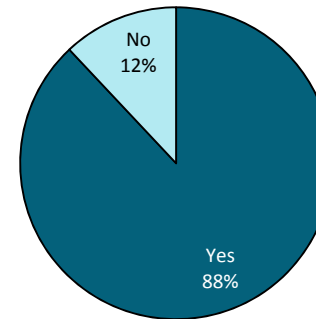
Base: 145



PROMPTED AWARENESS

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

Base: 145



Just over **one in three** stakeholders were able to **spontaneously identify FRDC** as being responsible for managing and investing in National Research and Development across the Australian fishing industry.

When **prompted** with the FRDC name a large proportion of stakeholders **52%** reported that they had heard of the name.

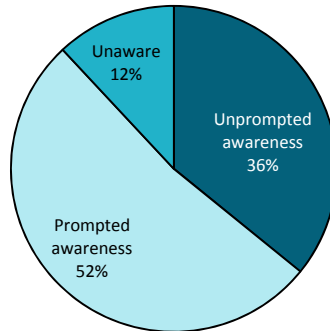
What we asked:

Which organisation is responsible for managing and investing in National Research and Development across the Australian fishing industry?

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

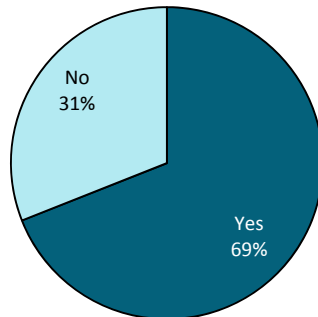
Awareness summary

Base: 145



Are you aware that FRDC has a Fisheries Research Advisory Board (FRAB) in each state with representation from the fishing industry sectors to help plan and assess research applications?

Base: 52



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

When asked about to describe FRDC's responsibilities, it was evident there are three clusters of stakeholders:

- Firstly those unaware and not familiar with the name (12%)
- Secondly those who have heard of the name but are simply unable to provide a reasonable description of what FRDC's roles is (52%); and
- Thirdly, those who have a much clearer understanding of who FRDC is, their role and responsibility (36%).

The results indicate a clear linkage:

- If stakeholders can identify FRDC spontaneously then there is a far greater likelihood that they will have a much clearer understanding of the role and responsibilities of the organisation.
- In contrast there is a strong level of awareness of the FRDC name but for many of these stakeholders there is little subsequent knowledge or familiarity with the organization. As a result they remain largely unfamiliar and unconnected to the organisation. While they may have some familiarity with the R&D and its outcomes the link between this and FRDC is not strong enough to ensure appropriate attribution.

What we asked:

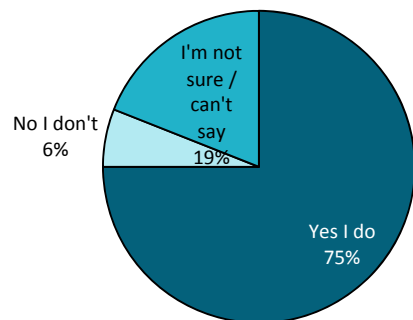
Before today had you heard of Fisheries Research and Development Corporation or FRDC?

Are you aware that FRDC has a Fisheries Research Advisory Board (FRAB) in each state with representation from the fishing industry sectors to help plan and assess research applications?

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

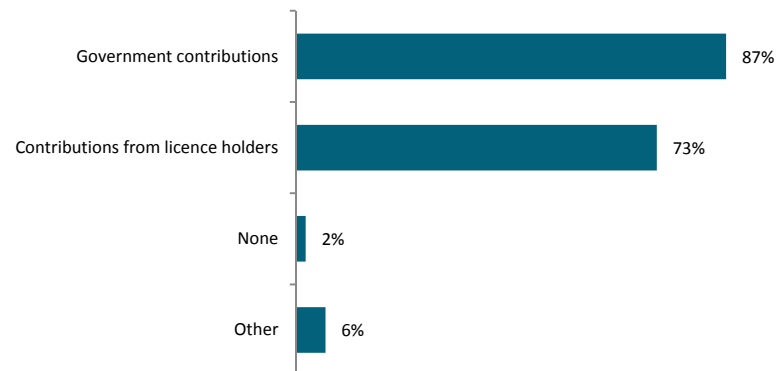
Do you pay a contribution to FRDC to manage and invest in research & development on behalf of the fishing industry?

Base: 52



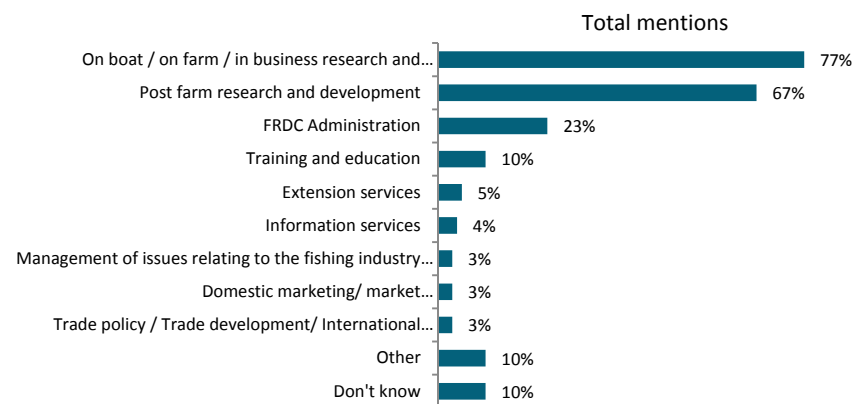
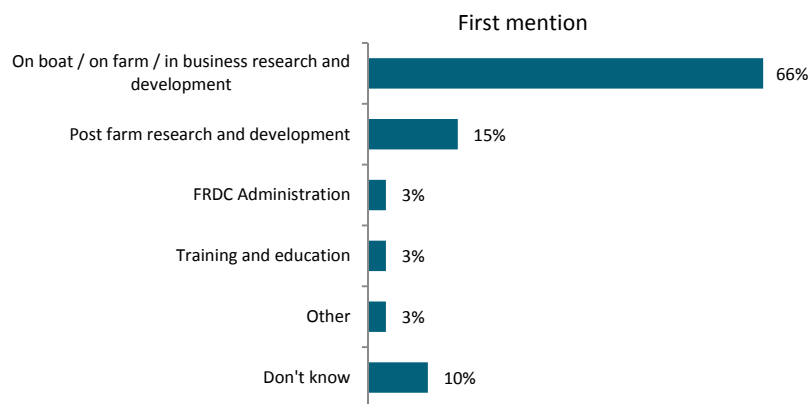
To the best of your knowledge what are the sources of funding for FRDC?

Base: 52



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

Base: 39




What we asked:

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

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

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



overall stakeholder satisfaction and
satisfaction across the key result areas

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

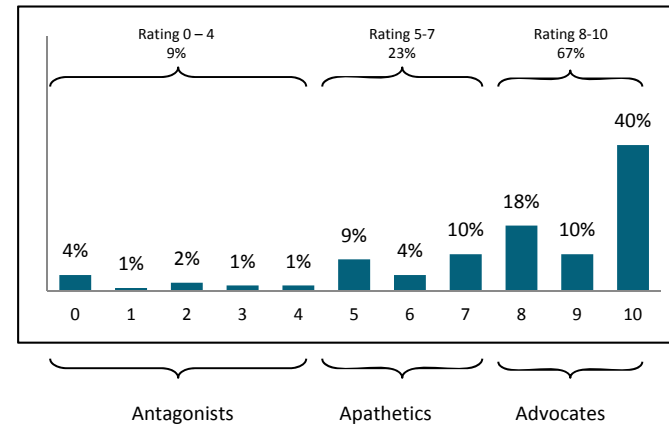
Base: 145



Of no importance at all

Extremely Important

Rating distribution



Overall, FRDC's stakeholders acknowledge that having an organisation like FRDC is important for the fishing industry.

While this does not speak to stakeholders satisfaction with the 'performance' of FRDC in identifying and managing R & D, investments it reflects a positive endorsement on the perceived role and responsibilities associated with managing R&D for the collective industry.

	Unprompted awareness	Prompted awareness	Unaware
<i>n</i>	52	72	16
	8.8	7.4	6.3

Different views on the importance of having an organisation like FRDC exist ...



ADVOCATES: Have clearly shown support behind the need for the fishing industry to have an organisation like FRDC (rating 8-10)



APATHETICS: Report a level of ambivalence towards the need for an organisation like FRDC (rating 5-7)



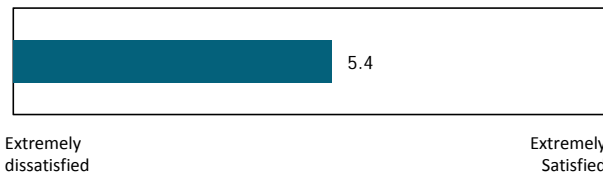
ANTAGONISTS: Reject the need for an organisation like FRDC (rating 0-4)

What we asked:

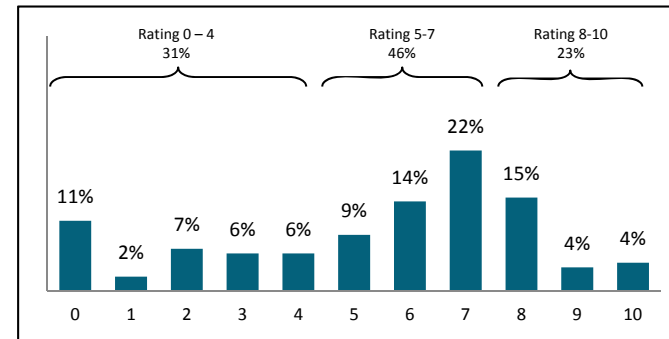
How important is it for the Australian fishing industry to have an organisation like FRDC?

Satisfaction that are you that your contributions are being invested wisely and for the benefit of stakeholders?

Base: 145



Rating distribution



When asked specifically about their satisfaction with how their R & D investments are being made, stakeholders reported a lower level of satisfaction (5.4).

This result is unsurprising albeit perhaps somewhat lower than would be preferred.

As will be shown through this report stakeholder satisfaction on this metric will be based on what they know, how engaged they are and their appetite for R & D insights.

We would further note that among those stakeholders 'familiar' (aware and have knowledge of FRDC) that satisfaction is substantially higher at 6.1.

	Antagonists	Apathetics	Advocates
<i>n</i>	14	32	94
	1.3	4.5	6.3

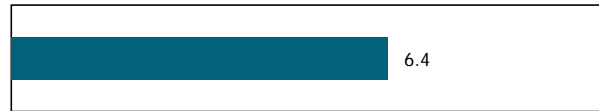
	Unprompted awareness	Prompted awareness	Unaware
<i>n</i>	52	71	14
	6.1	4.8	5.9

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

Key Result Areas

Satisfaction that FRDC has explained where their contributions are being invested in R&D?

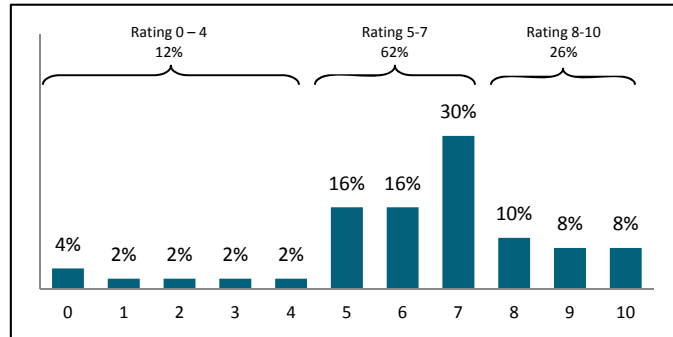
Base: 52



Extremely
dissatisfied

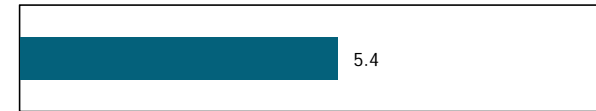
Extremely
Satisfied

Rating distribution



Satisfaction that their contributions are being invested in areas that are important and matter to the fishing industry and their businesses

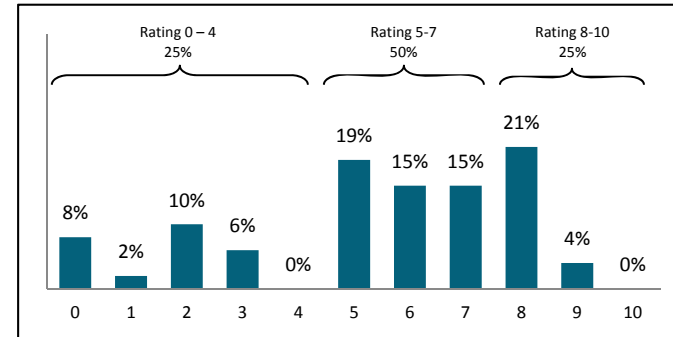
Base: 52



Extremely
dissatisfied

Extremely
Satisfied

Rating distribution



What we asked:

And thinking of the issues we've just discussed, overall how satisfied are you that FRDC has explained where your contributions are being invested in R&D?

Now, taking into account your satisfaction with the programs FRDC invests in overall how satisfied are you that your contributions are being invested in areas that are important and matter to the fishing industry and businesses like yours?

Key Result Areas

Satisfaction with their opportunity to participate in FRDC programs and events or access services or information available from the R&D?

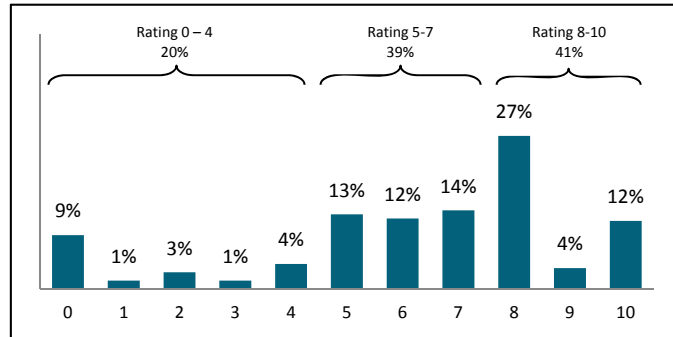
Base: 145



Extremely dissatisfied

Extremely Satisfied

Rating distribution



Satisfaction with their opportunity to have a say in the way in which your contributions are invested?

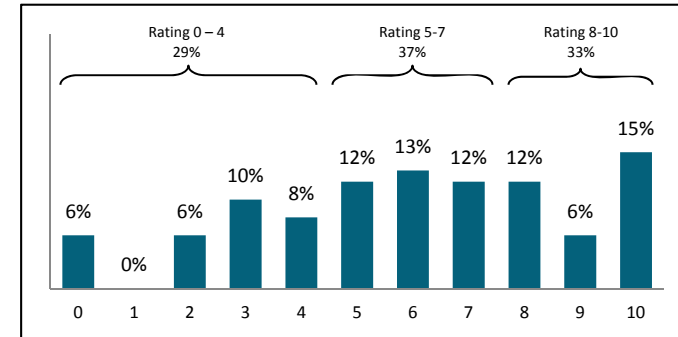
Base: 52



Extremely dissatisfied

Extremely Satisfied

Rating distribution



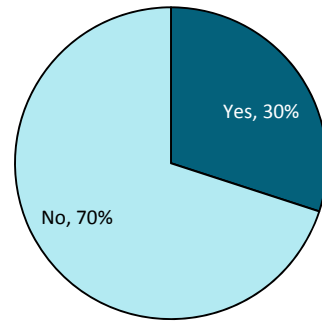
What we asked:

Taking into account the things we have just discussed, any contact with FRDC, the website, overall how satisfied are you with the opportunity you have to participate in FRDC programs and events or access services or information available from the R&D?

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

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

Base: 145



	Unprompted awareness	Prompted awareness	Unaware
<i>n</i>	52	76	17
Yes	46%	22%	18%

	Antagonists	Apathetics	Advocates
<i>n</i>	14	32	43
Yes	7%	9%	43%
No	93%	91%	57%

Where did you discover the information or results.

Base: 52



Stakeholders reported a range of different responses to reflect a change in their business as a of research findings including:

There's been research undertaken on temporal patterns, when it's good to fish throughout the year, and that's affected when we go out to fish.

We changed our genetic breeding program.

We upgraded our disease analysis of your breeding stocks (aquaculture).

We've had a change of production methods based on new equipment we found through research. We are a production based company so we're always looking for new technology and production methods. We try to employ them. Another example the chiller we used to run at 4 degrees, research from the freight logistics council of Tasmania said maybe 8 degrees is best, so we now have our chiller at 8 degrees. So there's a direct example for you. Some local research out of, done by a company that was then sent out to us, shell quip they send out a flyer of their work and research and we've contacted some of the farmers who were featured in their articles, to find out what they've used what they've thought. Followed it up, we upgraded our major grading machine to the latest technology based on that information. Works for us, our were seven years old and there's been big changes since then so its a good time to upgrade. Visiting other farms, that's another way we research. They were using load shell technology to weigh out their oysters, a technology from France, contacted people locally, made the same load shells. We've tracked it down. Commissioned about two weeks ago.

I've changed over and targeted garfish more as a result of some research I've read.

What we asked:

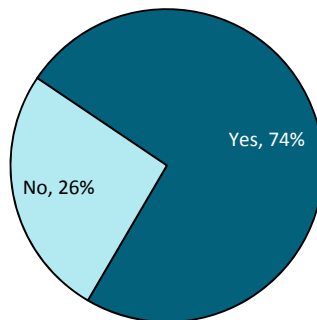
And in the last 12 months have you used any information or findings from research to make changes in your fishing business?

What changes did you make as a result of the information or results from the research?

And where did you discover the information or results from the research? How did you come across this information?

Service improvements

Base: 145



Perhaps not surprisingly there were a range of issues raised when fishers were asked about how FRDC could improve its services to the industry and businesses like theirs.

In no order of priority the issues mentioned included:

- More industry led projects and industry generated research on issues relevant and of importance to the industry
- Stronger linkages between the research and business profitability
- Better engagement with industry - - look for opportunities to better educate and inform the industry on who FRDC is and what they are responsible for
- A greater level of investment in marketing and promotion of the industry
- Easier access to information on and results from the research projects
- Look at different ways of communicating with the industry
- Rebalance efforts towards the smaller operators in industry – too much focus on the very large businesses
- More effective lobbying of Governments on key issues

What we asked:

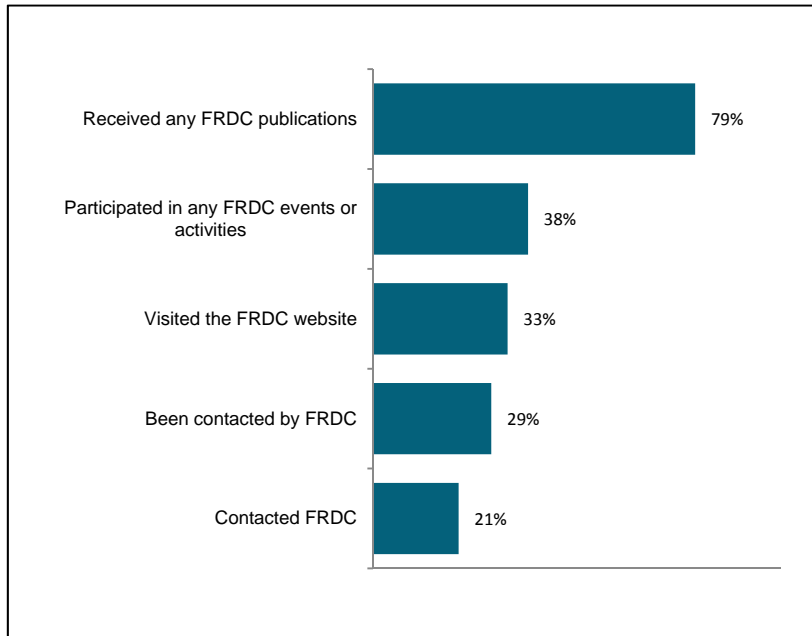
Could FRDC improve its service to the fishing industry and to businesses like your? [If yes] please specify.



interaction with FRDC

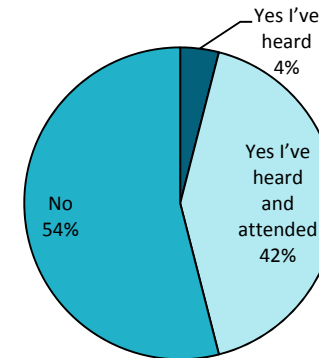
Have you done any of the following...

Base: 52



In the last 12 months have you heard about or attended any R&D extension seminar, workshop or events?

Base: 52



Almost all these stakeholders have had an engagement experience with FRDC over the last 12 months. The engagement has largely been 'remote' through the communications and collateral driven by FRDC.

What we asked:

In the last 12 months have you done or experienced any of the following...

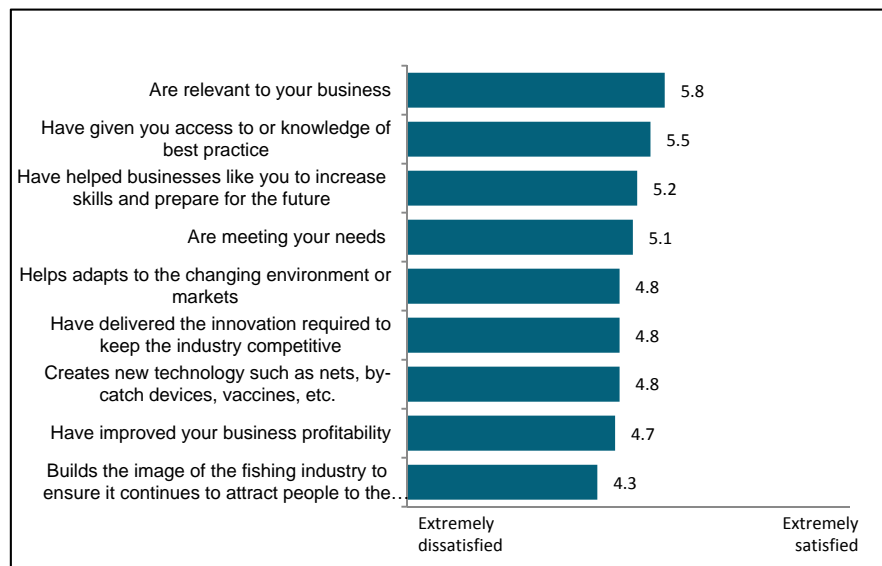
In the last 12 months have you heard about or attended any R&D extension seminar, workshop or events?



reaction and response to the FRDC
investments

Satisfaction with aspects of the R&D programs FRDC invest in ...

Base: 52



What areas they would they like to see FRDC make greater investment in?

- Perhaps not surprisingly , stakeholders identified a range of different areas where they would like to see FRDC make a more substantial investment in, including:
- Breeding programs
 - Environmental changes / Climate changes
 - Increasing business productivity
 - Increasing business profitability
 - Industry led projects rather than science run projects
 - Industry promotion projects and investment
 - Market development
 - Making industry more sustainable

What we asked:

I'd now like to know how satisfied you are with the R&D programs and projects that FRDC invests in. Using a scale of 0 to 10 where 10 is extremely satisfied and 0 is extremely dissatisfied, how satisfied are you that FRDC invests in areas that.

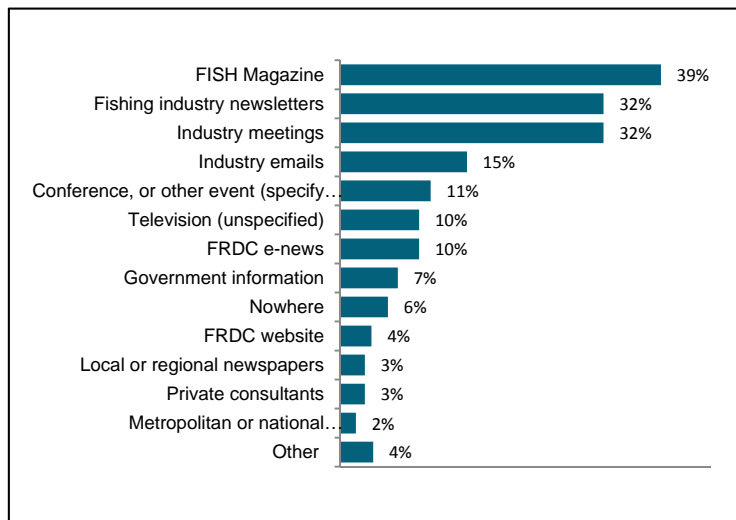
Thinking about research and development, what one area would you like to see FRDC make a greater investment in?



engagement with FRDC

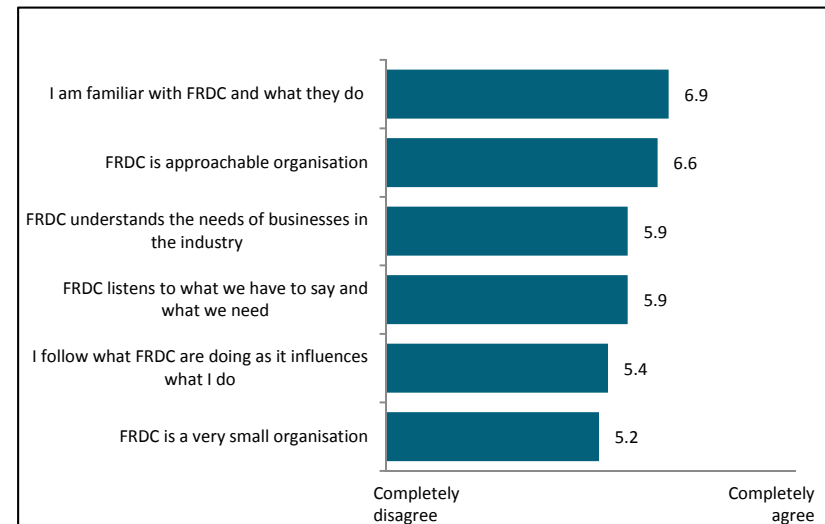
In the last 12 months, where have you seen or heard anything about FRDC?

Base: 52



Satisfaction with...

Base: 52

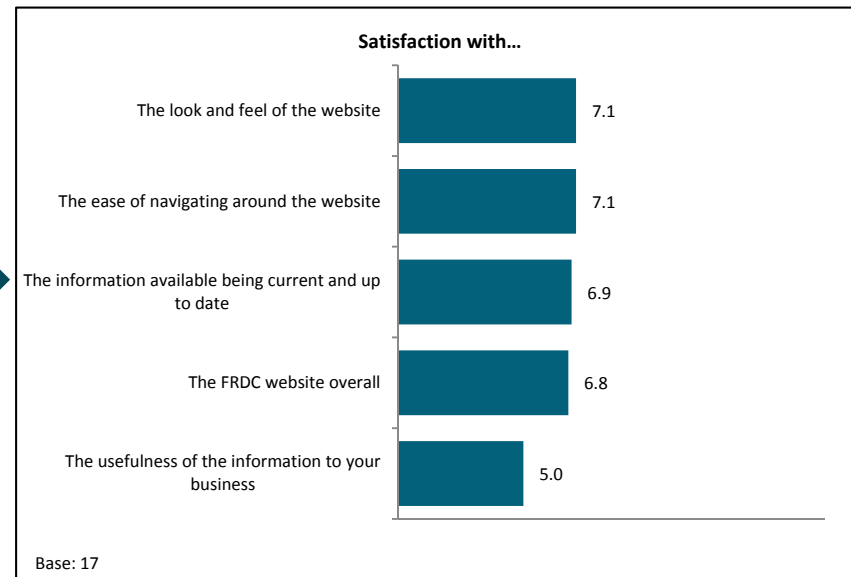
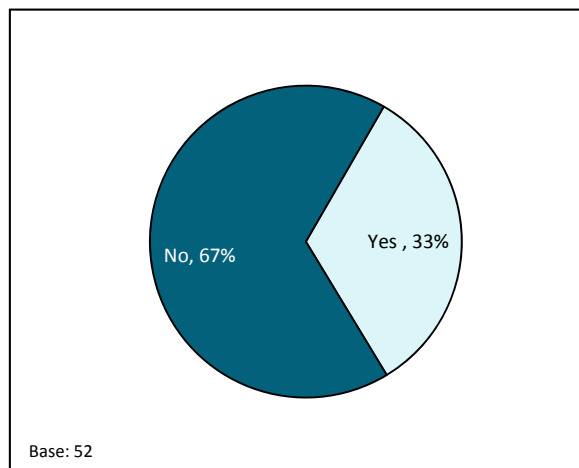


What we asked:

There are many places where you may hear or see information about FRDC. In the last 12 months, where have you seen or heard anything about FRDC?

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

In the past 12 months have you visited the FRDC website for any information?



What we asked:

In the past 12 months have you visited the FRDC website for any information?

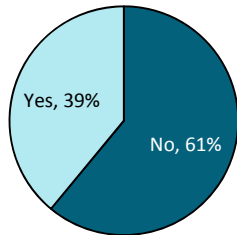
How satisfied were you with the FRDC website in terms of . . .

If you could change one thing about the FRDC website, what would it be? Please provide as much information as possible.



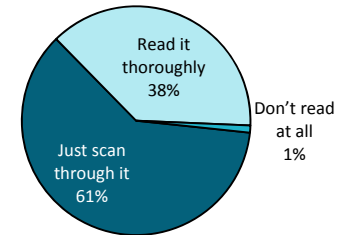
Do you receive the FISH magazine?

Base: 145



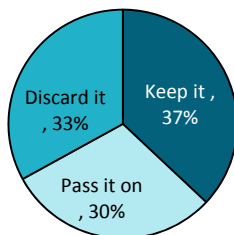
What they usually do when you receive the FISH magazine

Base: 89

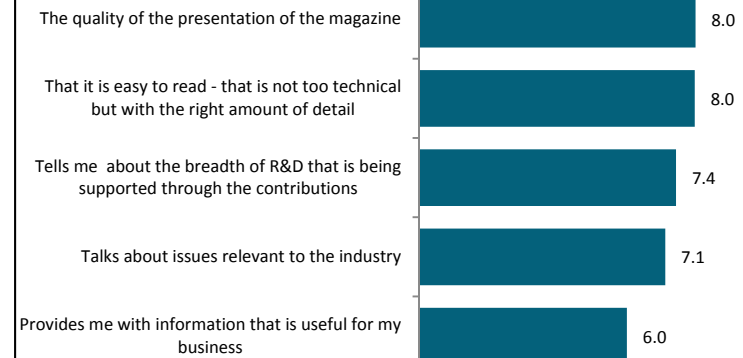


What they do after they finish reading FISH

Base: 89



Satisfaction with...



Base: 89

What we asked:

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

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

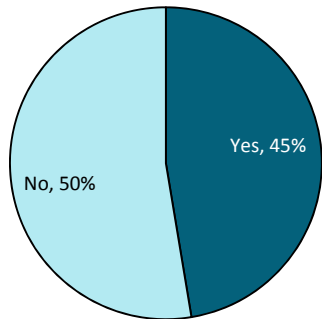
Which of the following best describes what you usually do when you receive the FISH magazine? Would you say you . . .

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



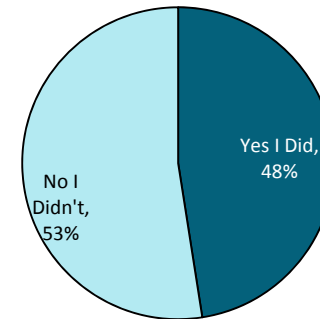
Have you ever followed up information or stories you have seen in the FISH magazine to find out more details?

Base: 89



As a result of this follow up did you learn something new for your business or did you introduce new systems, technologies or approaches to the way you do business?

Base: 40



Stakeholders identified a number of areas where they believed improvements could be made to the magazine including:

- More information on the outcomes of projects
- Sector specific information (dependant on individual interest)
- Stories showcasing some of the 'people' in the industry
- have it available electronically

Clearly there are some challenges in balancing the specific sector interest of each group with the need to create a broad based appeal to the whole of the industry.

Feedback on how the magazine could be improved included:


- Responses suggesting more stories and information on sectors of interest to stakeholders – this reflects a somewhat narrow self interest in just their sector
- Increased frequency of publication (a small number suggested monthly)
- Move to an electronic format
- Reduce the costs by using less glossy paper and publication quality
- Use the magazine to promote the industry to be broader public
- More case studies highlighting the outcomes of research for individual businesses

What we asked:

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

As a result of this follow up did you learn something new for your business or did you introduce new systems, technologies or approaches to the way you do business?





the future: seafood marketing & FRDC

Reaction from FRDC stakeholders was sought around a potential future framework for seafood marketing.

The concept. . . .

In the last couple of years there has been discussion around the need to develop a Seafood Marketing Levy that would enable individual fishing industry sectors to make contributions towards marketing and promotion if they wished.

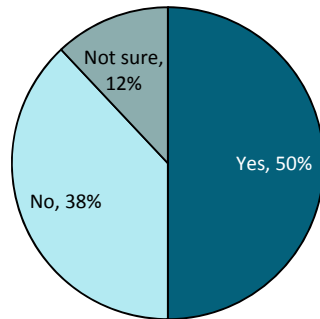
In 2010, the Minister for Agriculture Fisheries and Forestry wrote to seafood industry sectors seeking feedback; in addition the recent Productivity Commission Report on the Rural Research and Development Corporations highlighted that the lack of ability for marketing and promotion was an area that should be addressed.

Marketing or promotional activities would need to be funded by industry contributions and would not be eligible for Government funding.

As a result at some point in the future, the Government may look to FRDC to extend its range of services and support to the fishing industry through industry-funded market research (including storage, packaging and logistics) and domestic and or international promotion.

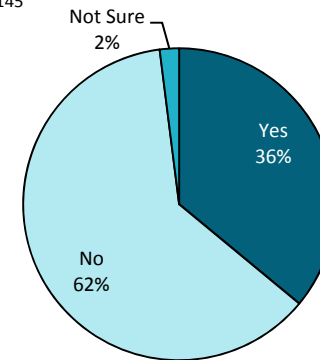
Based on what you know of FRDC, do you think taking on work related to seafood marketing and promotion is a 'good fit' with the role and responsibilities of FRDC?

Base: 145



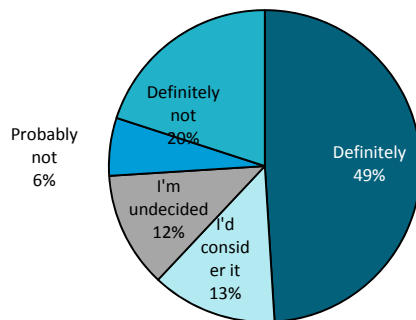
Are you aware of other organisations that are currently performing a generic marketing/promotion role for the industry?

Base: 145



If FRDC did commence marketing/promotion functions should they collect contributions from the seafood importers to help promote seafood?

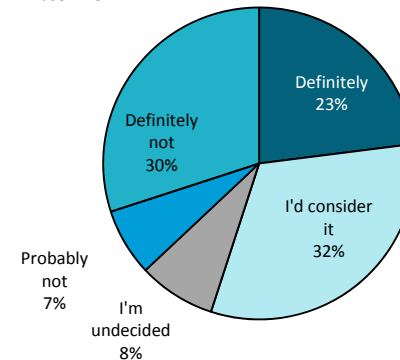
Base: 145



Definitely/consider it	62%
Undecided	12%
Definitely/probably not	26%

Would you be prepared, in the longer term, to support FRDC in its marketing/promotional efforts through additional marketing/promotional contributions for your sector?

Base: 145



Definitely/consider it	55%
Undecided	8%
Definitely/probably not	37%

What we asked:

Based on what you know of FRDC, do you think taking on work related to seafood marketing and promotion is a 'good fit' with the role and responsibilities of FRDC?

Are you aware of other organisations that are currently performing a generic marketing/promotion role for the industry?

If FRDC did commence marketing/promotion functions should they collect contributions from the seafood importers to help promote seafood?

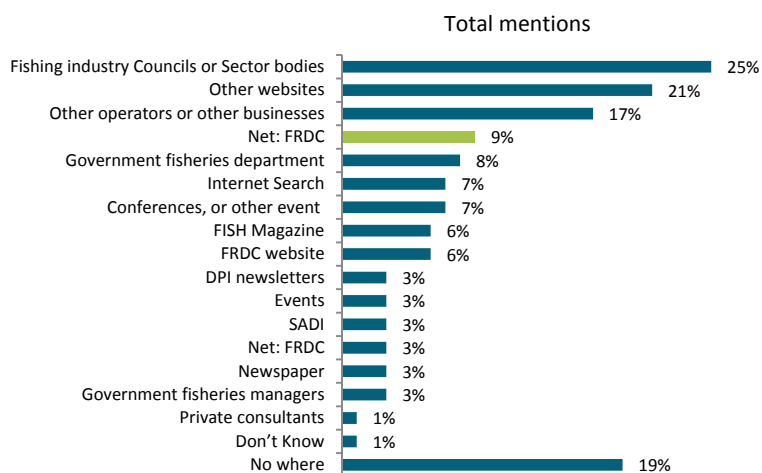
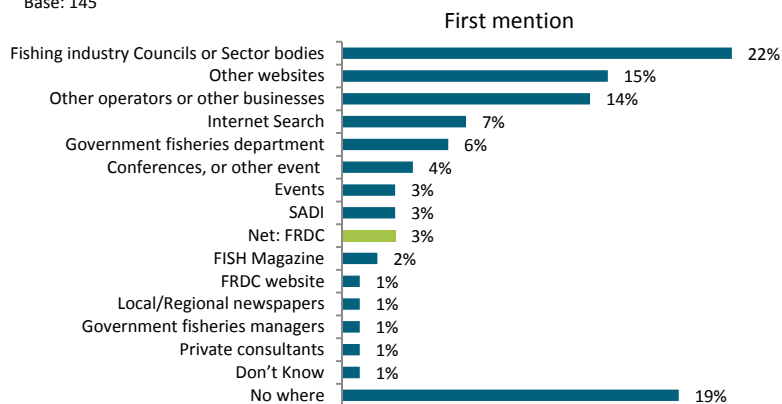
Would you be prepared, in the longer term, to support FRDC in its marketing/promotional efforts through additional marketing/promotional contributions for your sector?



stakeholders channels for information
sourcing

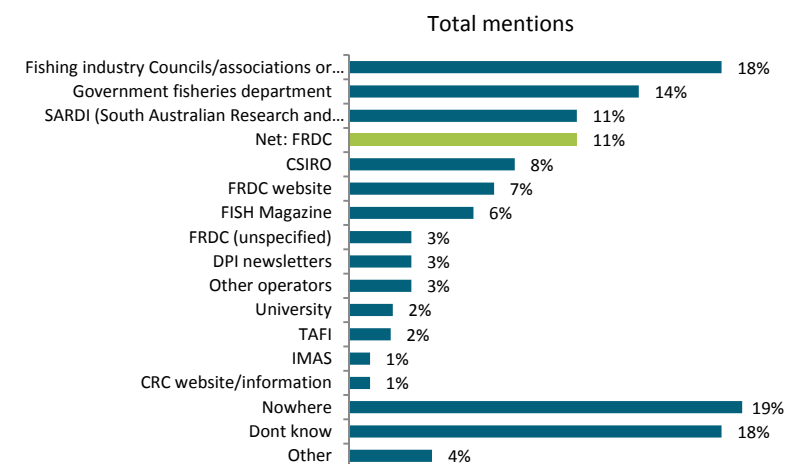
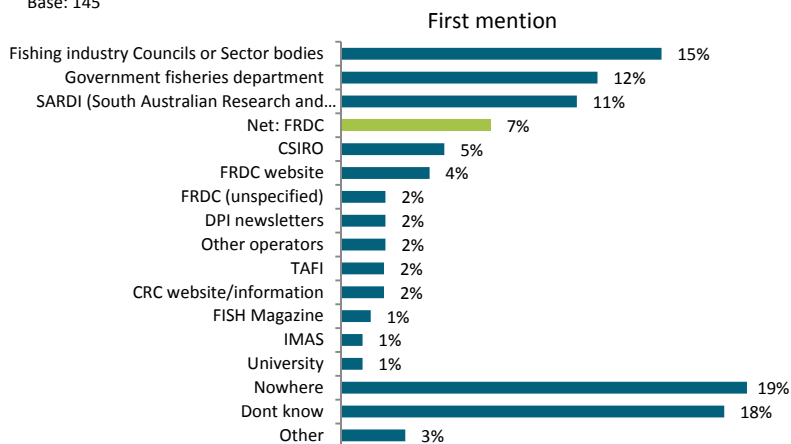
Where do you normally go to find out information on research or to improve your business?

Base: 145



And which organisation do you think provides the most reliable and transparent information on the outcomes of research?

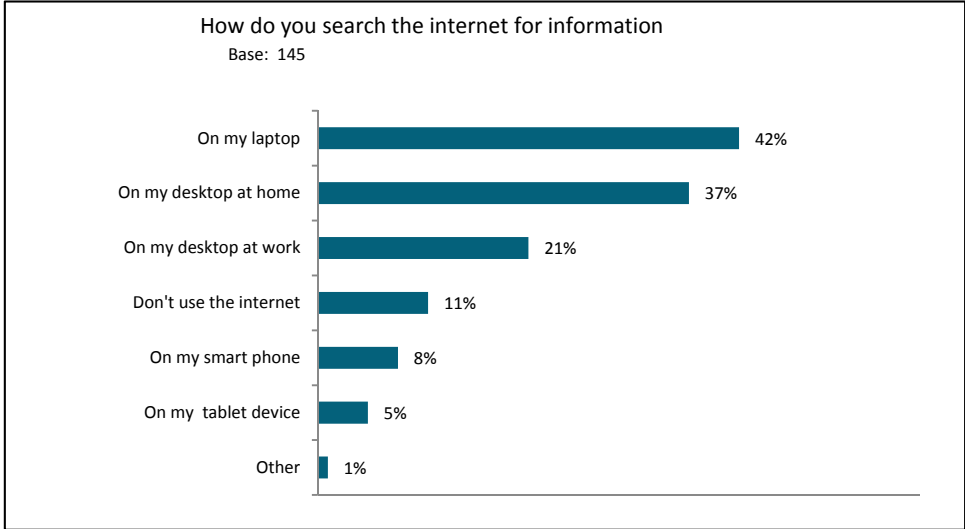
Base: 145



What we asked:

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

And which organisation do you think provides the most reliable and transparent information on the outcomes of research?

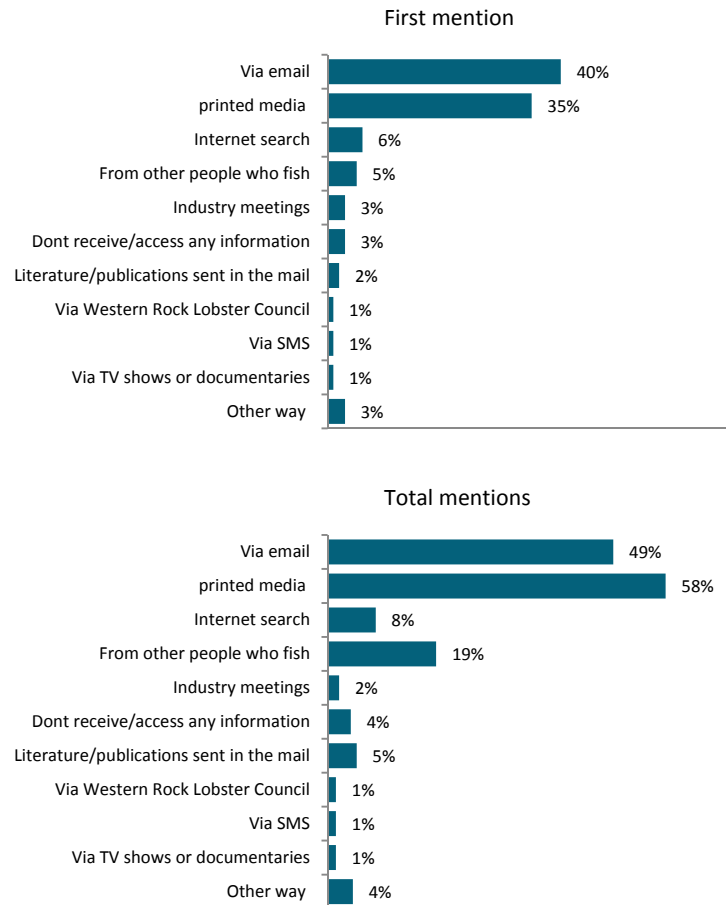


What we asked:

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

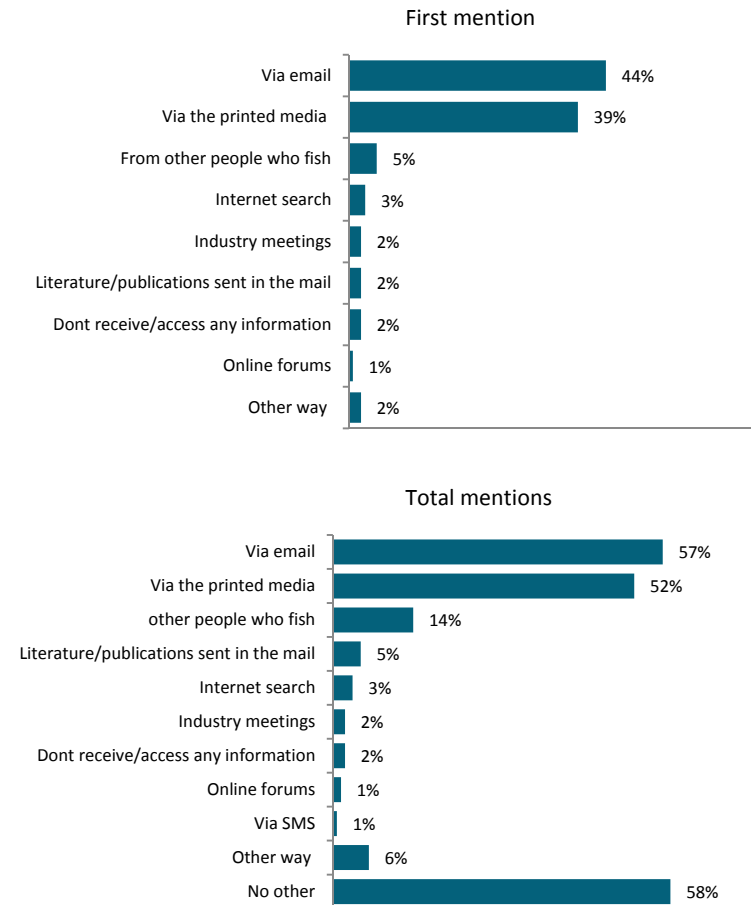
Current access to information on research.

Base: 145



Prefer to access to information on research .

Base: 145



What we asked:

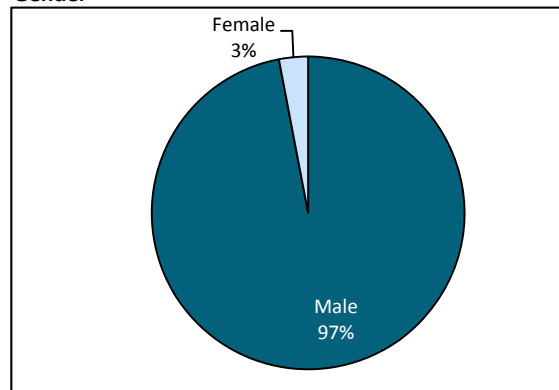
How do you **currently** receive or get access to information on research on the fishing industry?

How would you **prefer to receive or get access to information** on research on the fishing industry?



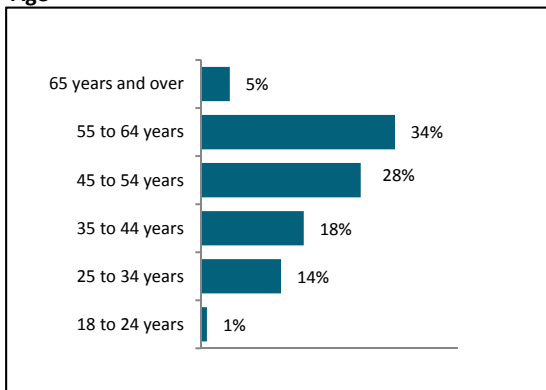
who we spoke to

Gender



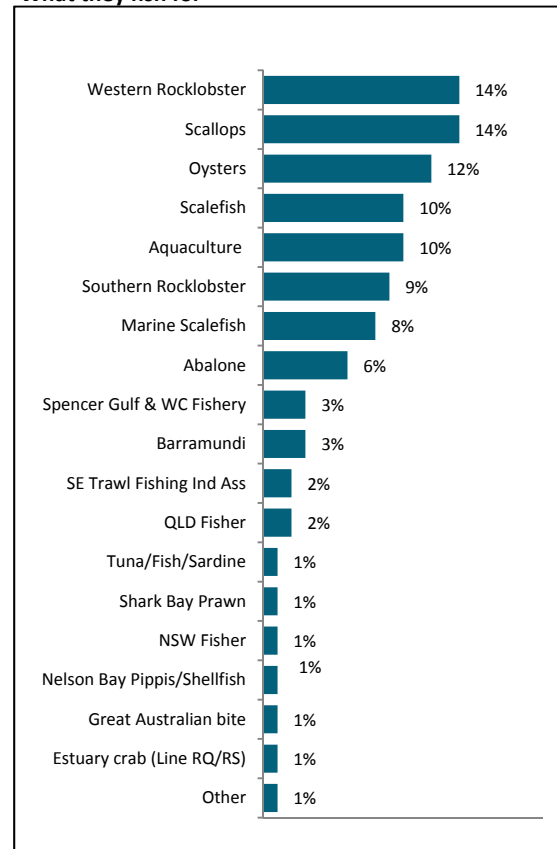
Base: 145

Age



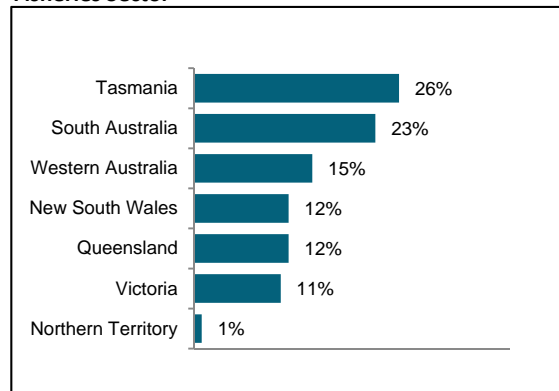
Base: 144

What they fish for



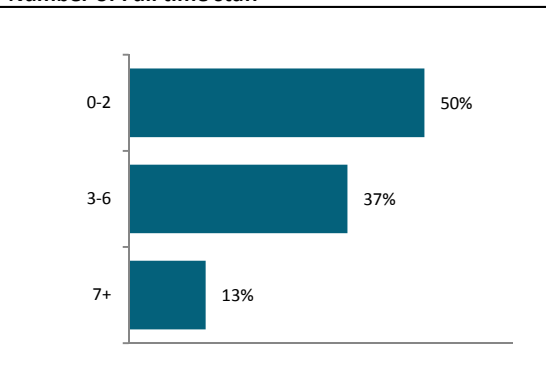
Base: 145

Fisheries Sector



Base: 145

Number of Full time staff



Base: 145

What we asked:

Gender – please select

In which of the following age brackets do you fit into?

Can I begin by asking what does your business predominantly fish for?

And which fishery does your business belong to?

How familiar would you say that you are with the research and developments that have occurred in the fishing industry in the past few years?



research design

Method: Telephone (CATI) interviews with representative sample of fishers.

Sample: Total of n=145 interviews completed and as shown in the table below. The final sample included a mix of what they fished for and the sector they fish in (as detailed in the report).

Sample lists: Sample list of stakeholders were provided by FRDC including details of principal contact name and contact details.

Questionnaire: 20 minute interview with stakeholders

Timing: Interviewing was undertaken between 15th September – 28th September 2011.

Call Summary:

	<i>n</i>	%
Completed	145	58%
Refused	21	8%
No contact	85	34%