



# 2020 FRDC Stakeholder Research

December 2020

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## Fisheries Research and Development Corporation

FRDC works with a diverse and geographically-dispersed group of stakeholders and the four main sectors of fishing and aquaculture (aquaculture, commercial fishing, Indigenous fishing and recreational fishing) whom are not mutually exclusive.

For the purposes of this research, we have identified three main FRDC stakeholder cohorts, including:

- Stakeholders directly involved with fishing and aquaculture sectors (which we describe as being active seafood businesses);
- Stakeholders who are supply chain partners; and
- Stakeholders who we describe as non-business stakeholders. This will include:
  - Federal, state and territory governments, including fisheries and natural resources managers, along with
  - The research community, including universities, government fisheries organisations, and private research providers.

These specific stakeholder cohorts are the focus of the 2020 FRDC Stakeholder Research.

FRDC also has as key stakeholders the Australian community, on whose behalf aquatic natural resources are managed, and of course seafood consumers. These groups were outside the scope for this research but are addressed in separate research studies.

### *A new strategic plan*

The recently launched FRDC R&D Plan commenced on 1 July 2020.

The Plan's main purpose is to convey a shared vision for the future, the outcomes required to pursue that vision, and the enabling strategies to achieve them. A brief overview of the Plan is shown opposite.

The FRDC's new plan was informed by a series of reviews, research and extensive consultation across a range of different industry stakeholders.



The Plan includes coverage across 5 R&D outcomes. Each of the planned outcomes are to be supported by a number of Enabling Strategies that are designed to build capability and provide foundational support to the delivery of the outcomes.

FRDC's investment in the five enabling strategies will be focused on assisting and achieving R&D Outcomes rather than investing in an Enabling Strategy activity by itself. It then provides a very targeted deployment of investment funds.

Measuring success is obviously important. Progress against the R&D Plan will be measured against a performance management framework that sets out how progress will be evaluated using metrics that are appropriate, timely and provide an accurate picture of the impact of investment.

## A challenging time for fishers and seafood businesses

It is important to note that the 2020 survey was undertaken at a somewhat unusual time, with a confluence of different factors creating an unusual operating environment for seafood businesses.

There was, at the start of 2020, confidence in both domestic and export markets.

However, the social, operating and trading environments have been significantly impacted by COVID-19 with restrictions of movement creating challenges for seafood businesses and creating uncertainty about business-as-usual practices. The outbreak and different impacts across Australia (including moving in and out of tighter restrictions) has impacted most commodity markets and is likely to continue to do so for some time.

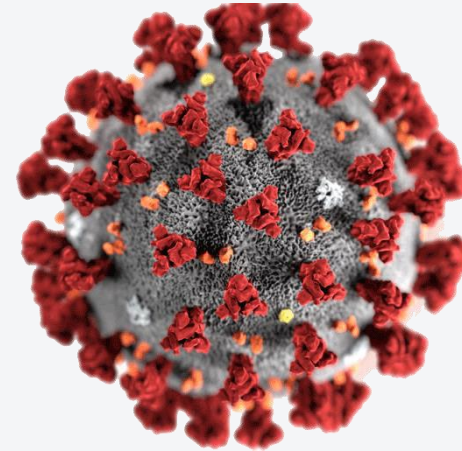
The 2020 FRDC Stakeholder Survey was undertaken at a time where the impact of COVID-19 continues and with ongoing uncertainty, about how business more generally might return to a more usual operating environment.

In addition, more recent export challenges into the Chinese markets are creating additional uncertainty for many agricultural sectors.

The impact on stakeholders' behaviours, intentions and attitudes is largely indeterminable, but should be considered when reviewing the results contained within this report.

With this as background, we move to provide an overview of the key findings from the 2020 FRDC Stakeholder Research.




The 2020 FRDC Stakeholder Research collected feedback from n = 347 stakeholders nationally. The information was collected over the period 10<sup>th</sup> November 2020 to the 9<sup>th</sup> December 2020.







**A summary of observations and insights**


## Key metrics

	6.0 (out of 10)	Mean satisfaction that contributions to FRDC are being invested wisely / for the benefit of industry
	-14	Net Promoter Score
	4.3 (out of 5)	Mean agreement that it's important for Aus fishing/aquaculture industries to have an organisation like FRDC

## Sentiment

	+34	NETT Sentiment of the future of Aus fishing/aquaculture industry
	+38	NETT Sentiment of the future of their seafood business

## FRDC R&D Plan


	40%	Have at least some understanding of the new R&D Plan
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## COVID-19 Impact

15% / 27% / 58% Reported an improvement / no change / decline in profitability of their seafood business

Of those who reported a decline, 45% are confident that business will return to pre-COVID-19 levels




## Use of FRDC information channels

Used at least one FRDC information channel	97%	
Viewed, read, visited, received / Of those, % indicated they learnt something new or introduced something to business		
FRDC Social Media	35% / 38%	
FRDC e-Newsletters	62% / 39%	
FRDC Website	81% / n/a	
FISH Magazine	93% / 54%	



## Uptake of FRDC engagement opportunities

Took up at least one engagement opportunity	79%	
Used Data and Information opportunity	72%	
Involved in People Development Activities	41%	
Attended Conferences	27%	


## Key metrics

	<b>6.1</b> (out of 10)	Mean satisfaction that contributions to FRDC are being invested wisely / for the benefit of industry
	<b>-7</b>	Net Promoter Score
	<b>4.4</b> (out of 5)	Mean agreement that it's important for Aus fishing/aquaculture industries to have an organisation like FRDC

## Sentiment

	<b>+31</b>	NETT Sentiment of the future of Aus fishing/aquaculture industry
	<b>+46</b>	NETT Sentiment of the future of their seafood business

## FRDC R&D Plan


	<b>21%</b>	Have at least some understanding of the new R&D Plan
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## COVID-19 Impact

**47% / 6% / 47%** Reported an improvement / no change / decline in profitability of their seafood business

Of those who reported a decline, **51%** are confident that business will return to pre-COVID-19 levels

## Use of FRDC information channels




Used at least one FRDC information channel	<b>94%</b>	
Viewed, read, visited, received / Of those, % indicated they learnt something new or introduced something to business		
FRDC Social Media	<b>38% / 38%</b>	
FRDC e-Newsletters	<b>47% / 42%</b>	
FRDC Website	<b>53% / n/a</b>	
FISH Magazine	<b>94% / 56%</b>	

## Uptake of FRDC engagement opportunities


Took up at least one engagement opportunity	<b>71%</b>	
Used Data and Information opportunity	<b>68%</b>	
Involved in People Development Activities	<b>35%</b>	
Attended Conferences	<b>18%</b>	




## Key metrics

	7.1 (out of 10)	Mean satisfaction that contributions to FRDC are being invested wisely / for the benefit of industry
	+21	Net Promoter Score
	4.6 (out of 5)	Mean agreement that it's important for Aus fishing/aquaculture industries to have an organisation like FRDC


## Sentiment

	+66	NETT Sentiment of the future of Aus fishing/aquaculture industry
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## FRDC R&D Plan

	56%	Have at least some understanding of the new R&D Plan
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## Use of FRDC information channels

Used at least one FRDC information channel	100%	
Viewed, read, visited, received / Of those, % indicated they learnt something new or introduced something to business		
FRDC Social Media	41% / 68%	
FRDC e-Newsletters	72% / 83%	
FRDC Website	100% / n/a	
FISH Magazine	93% / 88%	

## Uptake of FRDC engagement opportunities

Took up at least one engagement opportunity	88%	
Used Data and Information opportunity	84%	
Involved in People Development Activities	48%	
Attended Conferences	20%	



A summary of some of the key insights from the 2020 FRDC Stakeholder Research now follow. The results discussed below and then presented across this report are provided separately for the three stakeholder cohorts included within the coverage of the 2020 research. They were:

1. Active seafood businesses – Those who are working in the sector of “Aquaculture” or “Commercial Fishing”.
2. Supply chain businesses – Those who are not in an active business (as defined above) and are working in the sector of “Exporters”, “Processing”, “Retailer” or “Wholesaler”.
3. Non-business stakeholders – Those who are not in an active or supply chain business (as defined above) and are working in the sector of “Association”, “Government”, “Indigenous”, “Research Consultancy” or “University”.

## **Observations & insights**

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

- ✓ More respondents indicated they were positive than negative about the future.
- ✓ NETT sentiment (% positive – % negative) of +34 (active seafood businesses), +31 (supply chain) and +66 (non-business stakeholders).

### *The new FRDC Strategic Plan*

- ✓ Modest levels of familiarity reported with the new Strategic Plan. There are then opportunities for further initiatives to boost visibility of and familiarity with the Plan.
- ✓ The most urgent R&D outcome with the highest anticipated impact was:
  - fair and secure access to aquatic resources for both active seafood business and supply chain businesses, with
  - growth for ensuring prosperity identified as the most urgent of the five outcomes for non-business stakeholders.

### *Reported impact of COVID-19*

Perhaps unsurprisingly, COVID-19 has impacted the profitability of a large proportion of active businesses (58% reported a decline or significant decline in profitability) and supply chain businesses (47%).

These impacted businesses were more confident than not that their seafood business would return to pre-COVID profitability levels.

## Use of FRDC information channels

The feedback indicates that:

- Collectively, the use of FRDC's social media, e-newsletters, website and FISH magazine have enabled FRDC to reach most industry stakeholders. While reach provides one level of success, it doesn't not necessarily translate to consumption or use of the available resources.
- That said, the baseline results provide some reassurance that there is, at this time, the opportunity being created for messages to be shared across the various stakeholder cohorts.

## Take up of engagement opportunities

The 2020 FRDC Stakeholder Research explored engagement across these three engagement channels (data and industry information, People Development activities and supported conferences). From the feedback provided, we note that:

- Respondents to the survey reported a strong level of uptake of at least one of these engagement opportunities (at least seven in ten). That said, most respondents reported being involved with just one of these opportunities with the use of data, statistics and industry information the most likely opportunity utilised.
- As noted previously however, this will not necessarily translate to satisfaction with the experiences nor an immediate translation to practice change. It does however provide an important first step in activating strong outcomes from FRDC engagement.

## Satisfaction with FRDC

The feedback illustrates:

- A clear indication that stakeholders acknowledge the importance for the industry of having an industry service organisation like FRDC; but that
- The majority of stakeholders reported a positive level of satisfaction (rating 7 or higher).The satisfaction results are dampened by a relatively small cohort of stakeholders who have rated their satisfaction critically (below a 5).
- There remains then a modest level of satisfaction with the investments of levies for the benefit of the industry from stakeholders (6.0 out of 10 for active businesses, 6.1 for supply chain businesses and 7.1 for non-business stakeholders).

The detailed results from the 2020 FRDC Stakeholder Research now follow.



**Detailed results**



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## Stakeholder sentiment and outlook

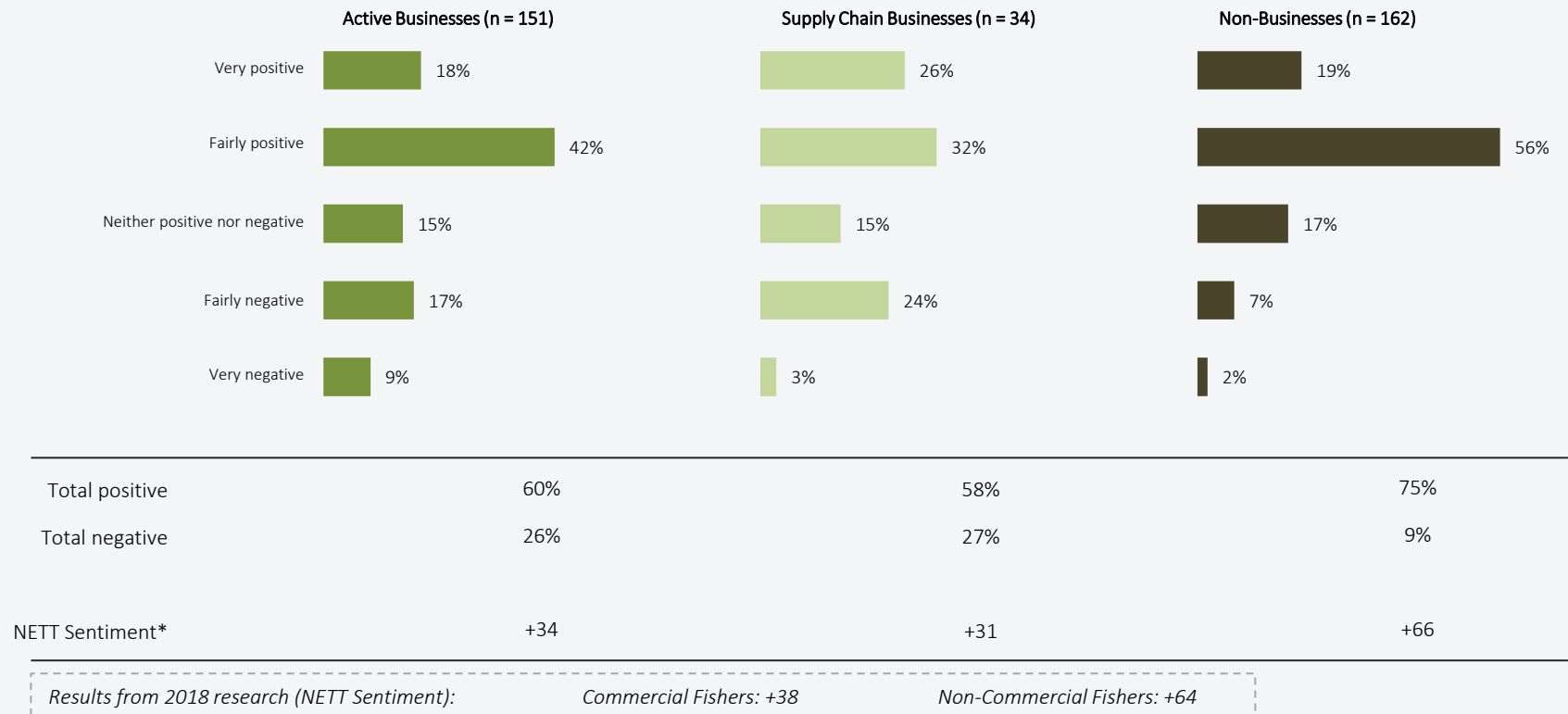
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Respondents from across each of the three stakeholder cohorts were asked about their perceptions of the future of the Australian fishing and aquaculture industries.

While the prevailing sentiment was positive, there remains some stakeholders less confident about the future. There is then a **cautious optimism** about the future of the industries.

How do you feel about the future of the Australian fishing and aquaculture industry? Would you say you feel...?

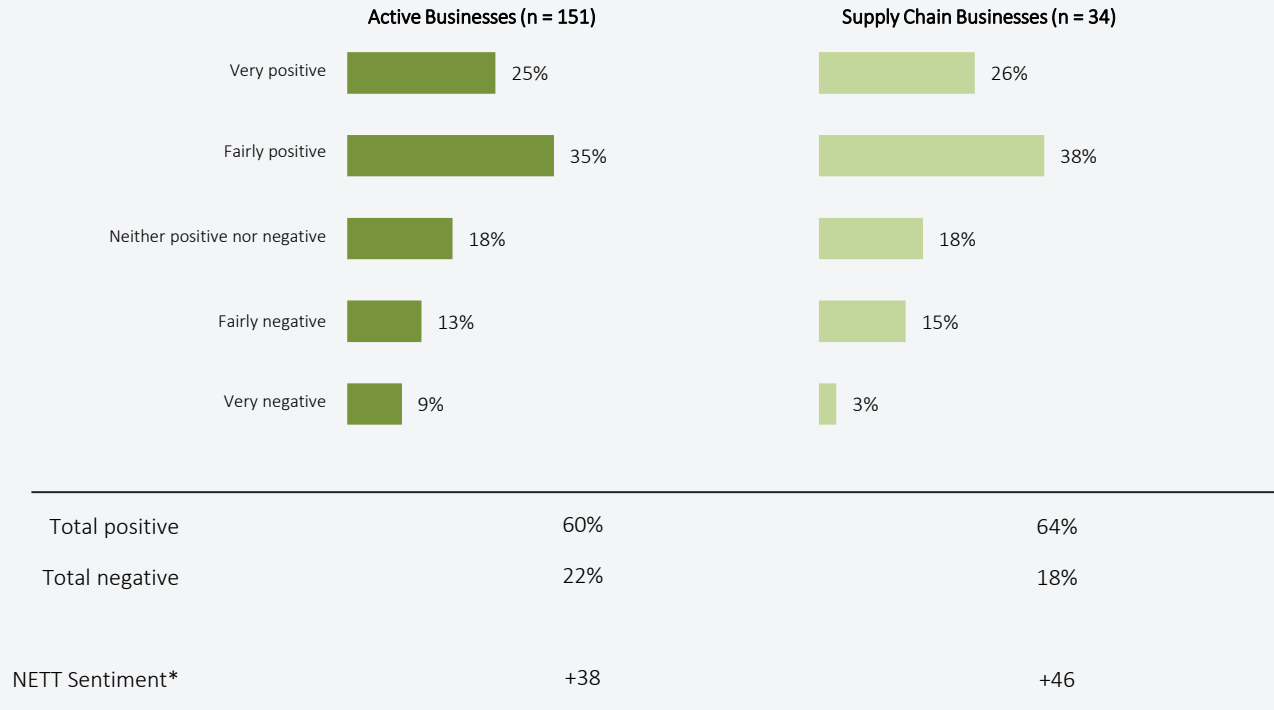
Asked to all respondents.



\*NETT Sentiment is the different 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 your seafood business? Would you say you feel...?

Asked to all Active and Supply Chain respondents.



Results from 2018 research (NETT Sentiment): Commercial Fishers: +37 Non-Commercial Fishers: n/a

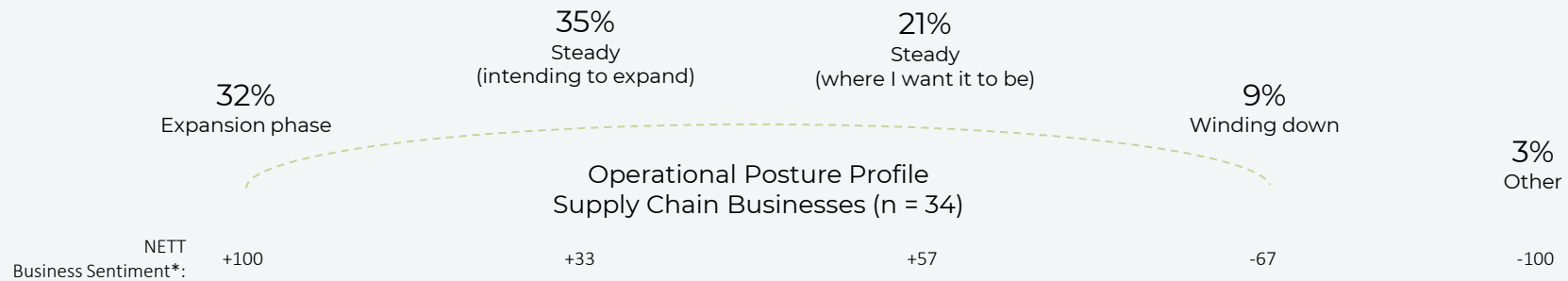
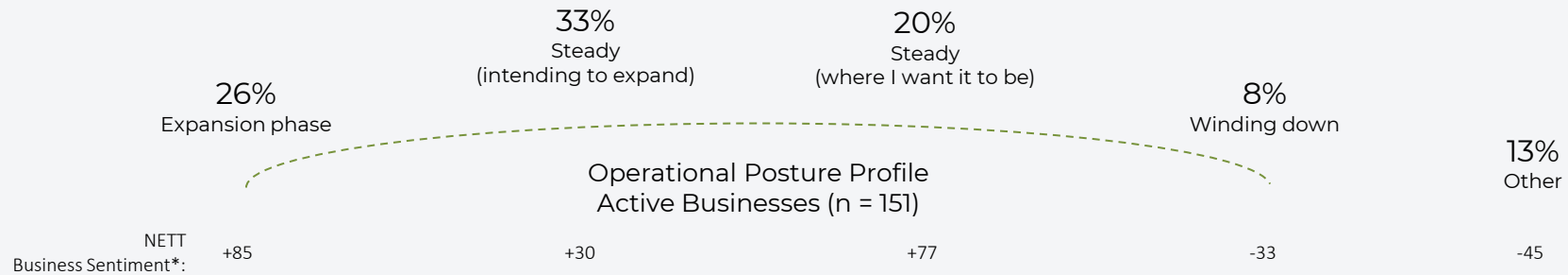
Seafood business respondents were slightly more confident and positive about the future of their own businesses.

The on-going trade issues with China and uncertainty about COVID are likely to be dampening the confidence of stakeholders.

\*NETT Sentiment is the different 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.

# Operational posture profile

How would you describe the phase your business is currently in? Is it...  
Asked to all Active and Supply Chain respondents.



\*NETT Sentiment is the different 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.





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**Feedback on strategic priorities**

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The recently launched FRDC Strategic Plan provides a backdrop for the responses and feedback from industry stakeholders.

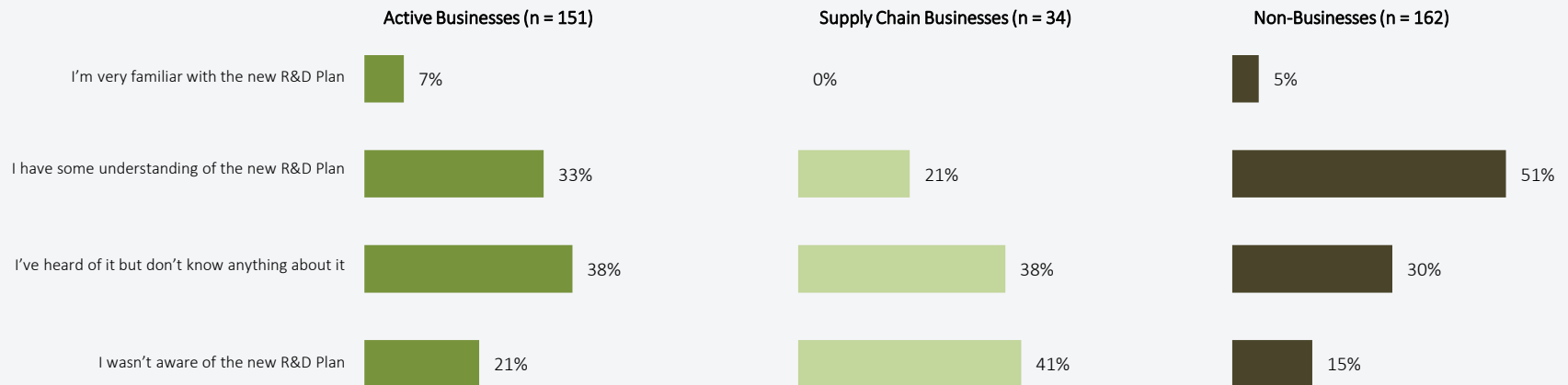
The results suggest that while there has been some success in achieving visibility of the Plan, there remains a substantial proportion of stakeholders with little or limited awareness of the Plan.

Clearly, further efforts are likely to be required to create wider visibility of and familiarity with the aim and targeted outcomes from the new Plan.

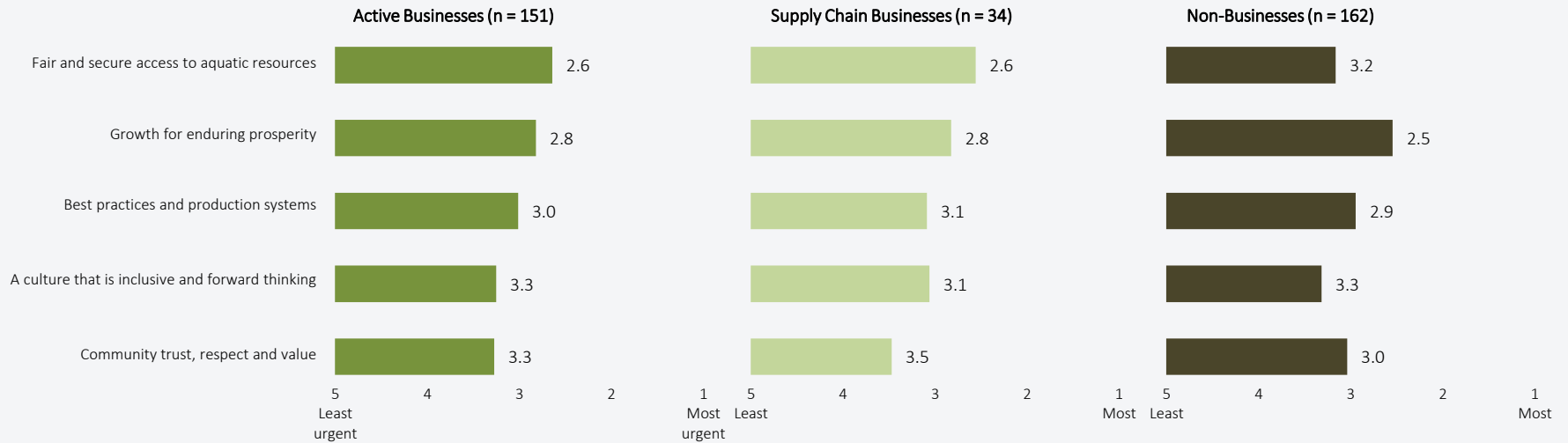


How familiar are you with the FRDC R&D Plan which commenced on 1 July 2020?

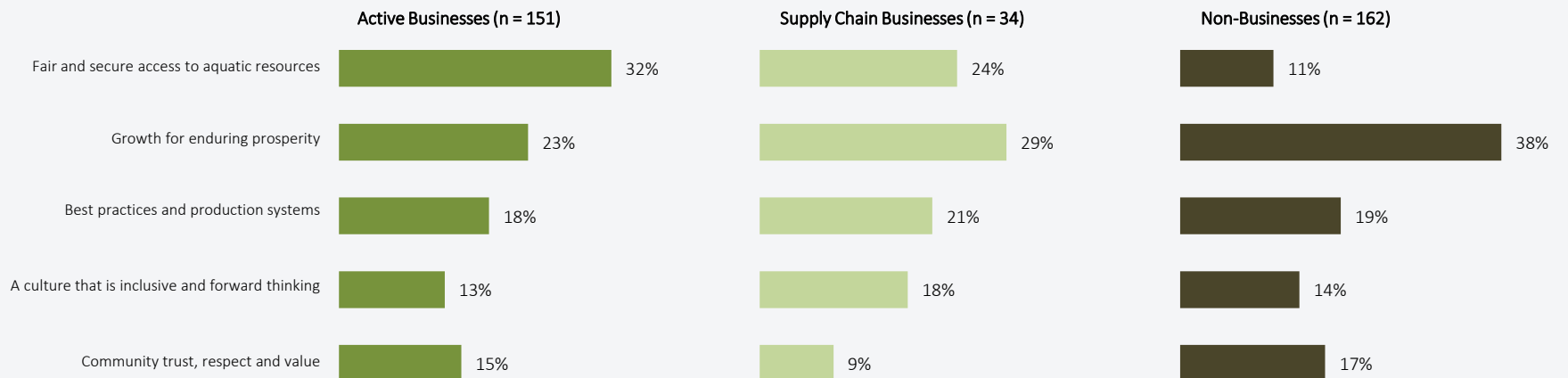
Asked to all respondents.



How would you rank the urgency of these five different R&D outcomes? Please rank from 1 to 5 with 1 being the most urgent outcome and 5 being the least urgent of these outcomes. Asked to all respondents.

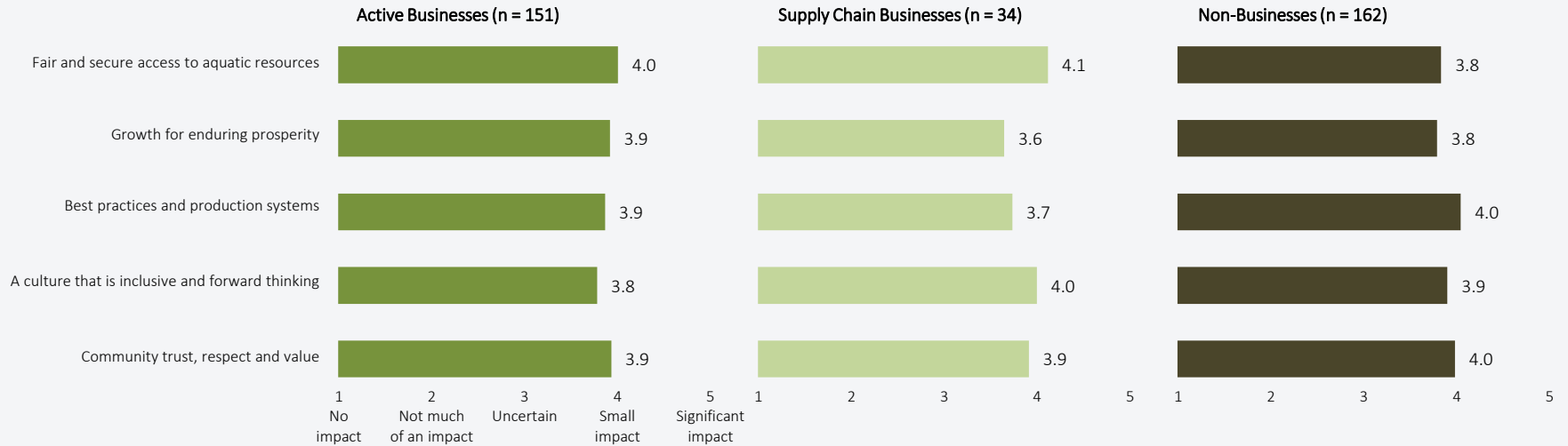


% of respondents ranking the R&D outcome as the “most urgent” (ranking of 1)

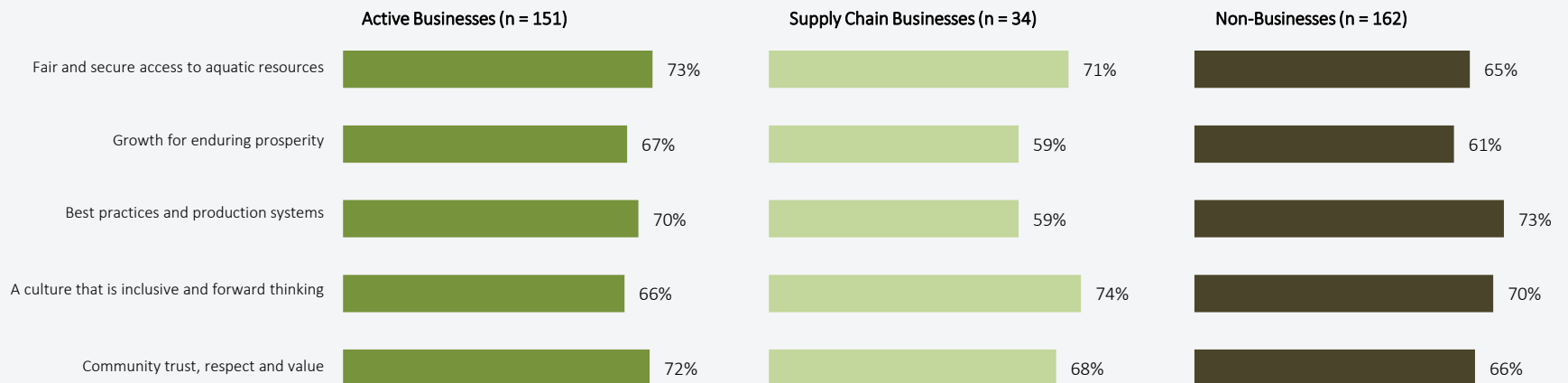


How much of a direct impact will progress in each of the agreed Strategic Plan areas have on your seafood business / organisation?

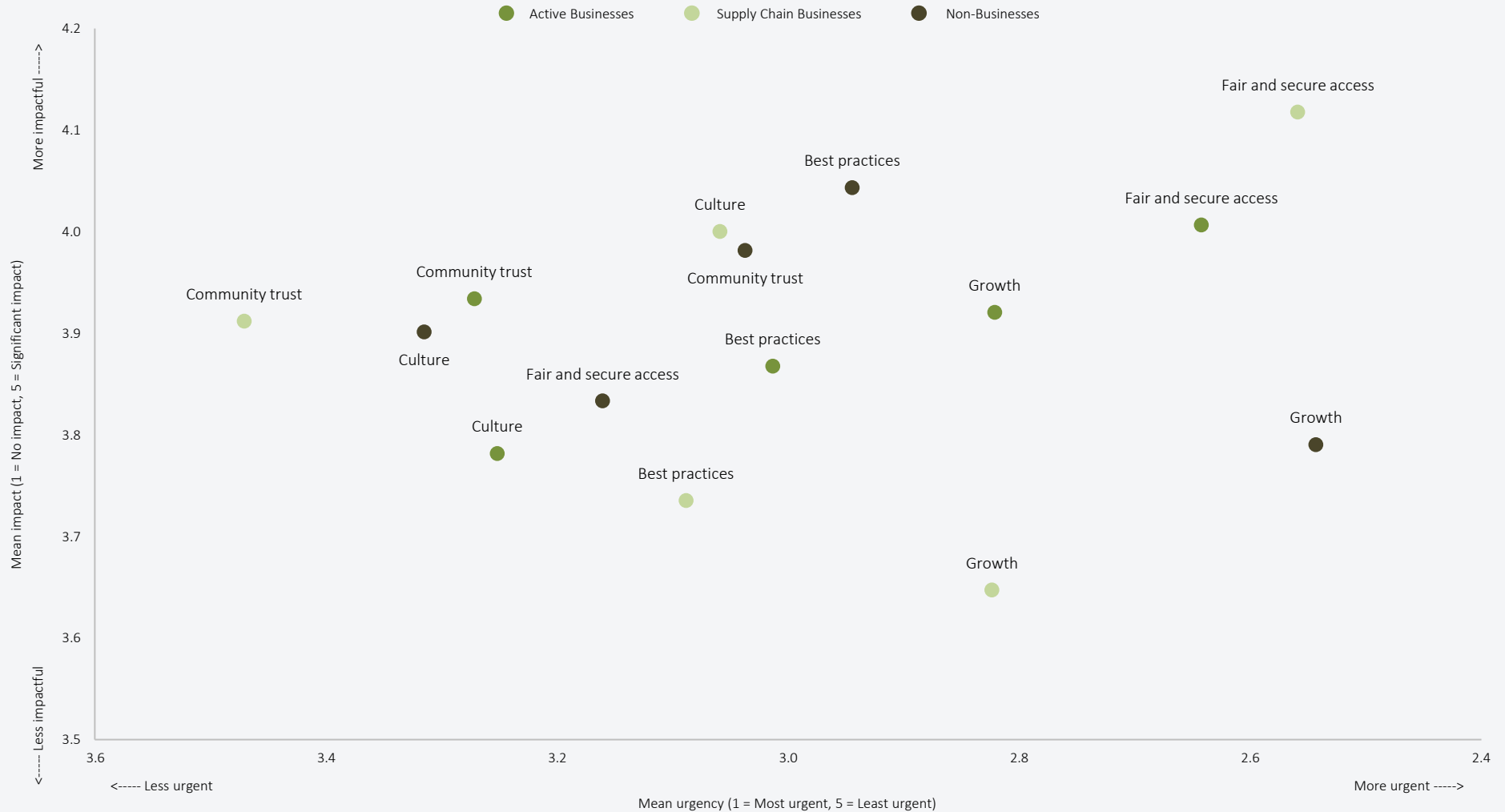
Asked to all respondents.



% of respondents rating each R&D outcome as having a “small impact” or “significant impact” on their seafood business / organisation



# Comparison of urgency and impact



**Growth for enduring prosperity:** This outcome is about an enduring and balanced ecological, social and economic growth for the community benefit

**Best practices and production systems:** This outcome is about achieving diverse benefits from aquatic resources to be consistent with shared principles

**A culture that is inclusive and forward thinking:** This outcome is about a fishing and aquaculture community that is cooperative, diverse and well equipped to enable growth and adaptability in a complex and uncertain world

**Fair and secure access to aquatic resources:** This outcome is about achieving an integrated management of Australia's aquatic resources, providing certainty and confidence

**Community trust, respect and value:** This outcome is about people feeling good about using the products, services and experiences provided by fishing and aquaculture

Are there areas, other than what have just been covered, that you would describe as important or extremely important for FRDC to invest in over the next four years?

Asked to all respondents.



What they said. . . .

"EXTENSION: as published educational tools suited for use by primary and secondary school teachers enabling syllabus structuring of Australasian fisheries as a potential career choice. Guide Books and Fact Sheets of marine, estuarine and freshwater species consumed as items of food in commercial, artisanal and subsistence fisheries. Accounts as interesting stories of fisher's interaction with the animals they capture or retain as pets.. Describe byproducts that add value beyond a source of food, e.g. pearls, jewellery crafted from shells and the global trade in collectible shells. FRDC to list recommended titles of publications deemed to have appropriate merit in advancing knowledge of fisheries, e.g. the OECD Multilingual Dictionary of Fish and Fish Products, Australian Fisheries Resources, P.J. Kailola et. al. 1993 and Southern Seafood (2019 [www.southernseafood.com.au](http://www.southernseafood.com.au)."

"Harmonisation among state jurisdictions with FRDC advocating and facilitating negotiations for sensible arrangements between Cwth and States where species distributions straddle jurisdictions e.g. it would seem rational that Cwth manages all of the bass Strait scallop resource in given the current inefficiencies in VIC and TAS. A tendency towards single species access licences is creating economically less profitable fisheries that are data poor and assessment is becoming more problematic. SAFS will have an increase in 'undefined' species that are costlier to manage, or they will be incorrectly classified as 'sustainable' if this trend continues. SAFS is failing to generate continual improvement with some agencies attempting to game the classification process. Not conducting it properly will erode community confidence in FRDC and defeat the purpose of SAFS."

"The catastrophic results from the increased effort in the mudcrab industry with the increase of trap numbers and fishers now targeting mudcrabs that prior to reform caught very little or none at all prior to reform ?the catastrophic results or the increase in blue swimmers size which has led to far more effort in mudcrab industry?the major reduction in diversity now in our industry as a result of reform which is putting increased effort on resources (stocks)and as a result and now the inability to allow resource and stocks to rejuvenate replenish rebuild and restock!the effect that transferable quota across the state can have diabolical consequences on certain estuaries if allowed to catch by far more than was previously caught before !"

"FRDC needs to note that Australian Supermarkets stock little or no packaged frozen Australian caught fish that is processed in Australia. Some of the packaged frozen fish in the Supermarkets is described as being caught in Australian waters but the fine print notes the product is packaged overseas. FRDC needs to promote the packaging of Australian caught seafood in Australia. Current and past FRDC research programs ignore the evidence that Trichodesmium blooms are probably promoting the bioavailability of heavy metals and are probably a source of toxins in the ciguatera food chain. Further work is urgently required to better quantify the potential impacts of Trichodesmium and develop management plans to reduce those impacts."

"I am profoundly thrilled about the success FRDC and partners have had in developing species of seaweed as a minor additive to cattle feed that (1) substantially increases their meat production rate (25%, that's amazing--in itself it is a dramatic benefit both economically and environmentally), and (2) reduces methane emission by I seem to recall reading an excellent article in Fish Magazine that says a 90% reduction. I would say that far exceeds anything FRDC has produced to date in terms of broader economic benefit and more than any biological product I ever heard of (worldwide, and over all historical time) to slow greenhouse gas emissions. Bravo!"

"Progress the actions set out in the 2017 National Aquaculture Strategy. There has been zero progress on the very first task in Table 1. When the first action item has not been progressed it provides little confidence that the federal government takes the plan seriously. I suggest that an audit of action items in the plan to determine what has been actioned and what is outstanding. This should be published on the departments website under the plan."

"Waste elimination - developing markets for, & using bycatch taken legally in preference to being discarded dead & of questionable benefit to the ecosystem & no benefit whatsoever to consumers of fisheries resources. Encompasses the concept of balanced harvesting as proposed in Kolding et al. 2016, Balanced harvest: utopia, failure, or a functional strategy? ICES Journal of Marine Science (2016), 73(6), 1616–1622. doi:10.1093/icesjms/fsw060."

"Fish health and biosecurity: preventative measures to monitor and avoid the spread and introduction of local and exotic diseases Fish welfare and stress: improve the current knowledge of adaptive and maladaptive responses (behavioral, physiological, and molecular responses) of economically and socially important stressors affecting cultured and wild fish (this will improve the public perception regarding the welfare of fishes."

"Aquatic animal health - as investment in aquaculture grows, the potential consequences of exotic and emerging diseases grows in proportion. Effective management is likely to contribute to investor confidence but also protects market access and investments critical to growth e.g. maximising domestic and international market access, allowing consolidation of domestication programs and translocation of improved genetic lines."

"Presume covered at high level but balancing access for conservation / protection with ecological sustainability. Some vocal FRDC commercial fishing advocates / scientists should stop ridiculing Marine Protected Areas and their management thereof and also recognize the need to have high target reference points (i.e. larger % stock above virgin biomass) for healthy marine systems rather than focusing on archaic MSY."

"Aquaculture and habitat restoration for carbon sequestration, water quality amelioration, and development of low trophic level aquaculture for human nutrition and boutique products (e.g. macroalgal aquaculture, oyster reefs). Development of this field will improve community perception of the industry, democratise aquaculture (e.g. through smallholder production), and provide vast growth potential for the industry."

"FRDC should invest as problems arise not when other problems that identified sectors are sorted out. I advance and example of marine mammal bycatch in an offshore Australia fishery where solutions were identified, yet totally ignored by FRDC and 12 years later suddenly reinvented when nothing had changed yet the Report had been used by foreign fishing situations for all that time and improvements made."

"It is important that the FRDC are looking to the future and exploring innovations and/or opportunities that are a long-term vision for industry. As normally industry are keen on short term benefits due to economic pressures and changes in their industry - they need to be flexible and adaptable. Long term vision puts value in evidence based practice - and innovation through research and development."

"Australia needs to develop sustainability criteria that can be used with or for existing accreditation schemes (eg BAP). This would make the existing biosecurity planning guidelines more meaningful because they could be audited as a part of existing QA audit processes for access to the big retailers. Market driven biosecurity would be much more effective than government driven biosecurity."



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**What and how stakeholder use FRDC information**

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# Source for industry research

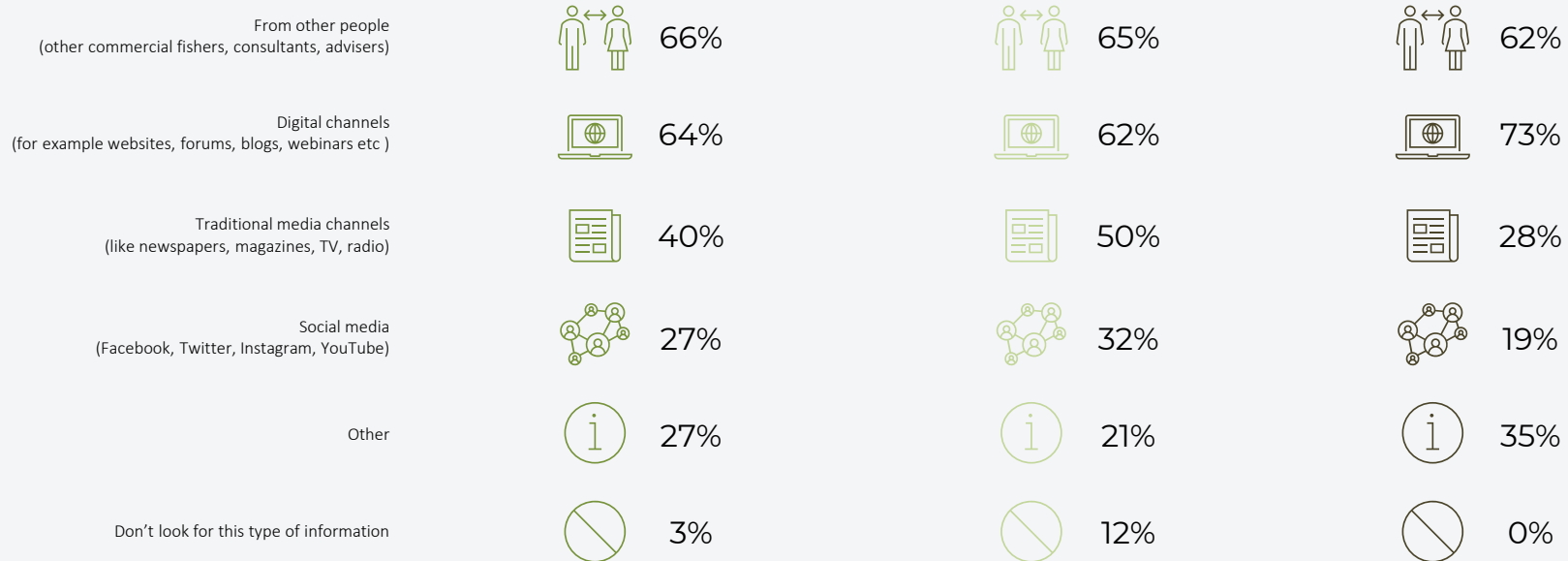
When you are looking for information about research (planned and completed research) that relates specifically to the fishing and aquaculture sectors, which of the following channels do you use to get this type of information?

Asked to all respondents.

Active Businesses (n = 151)

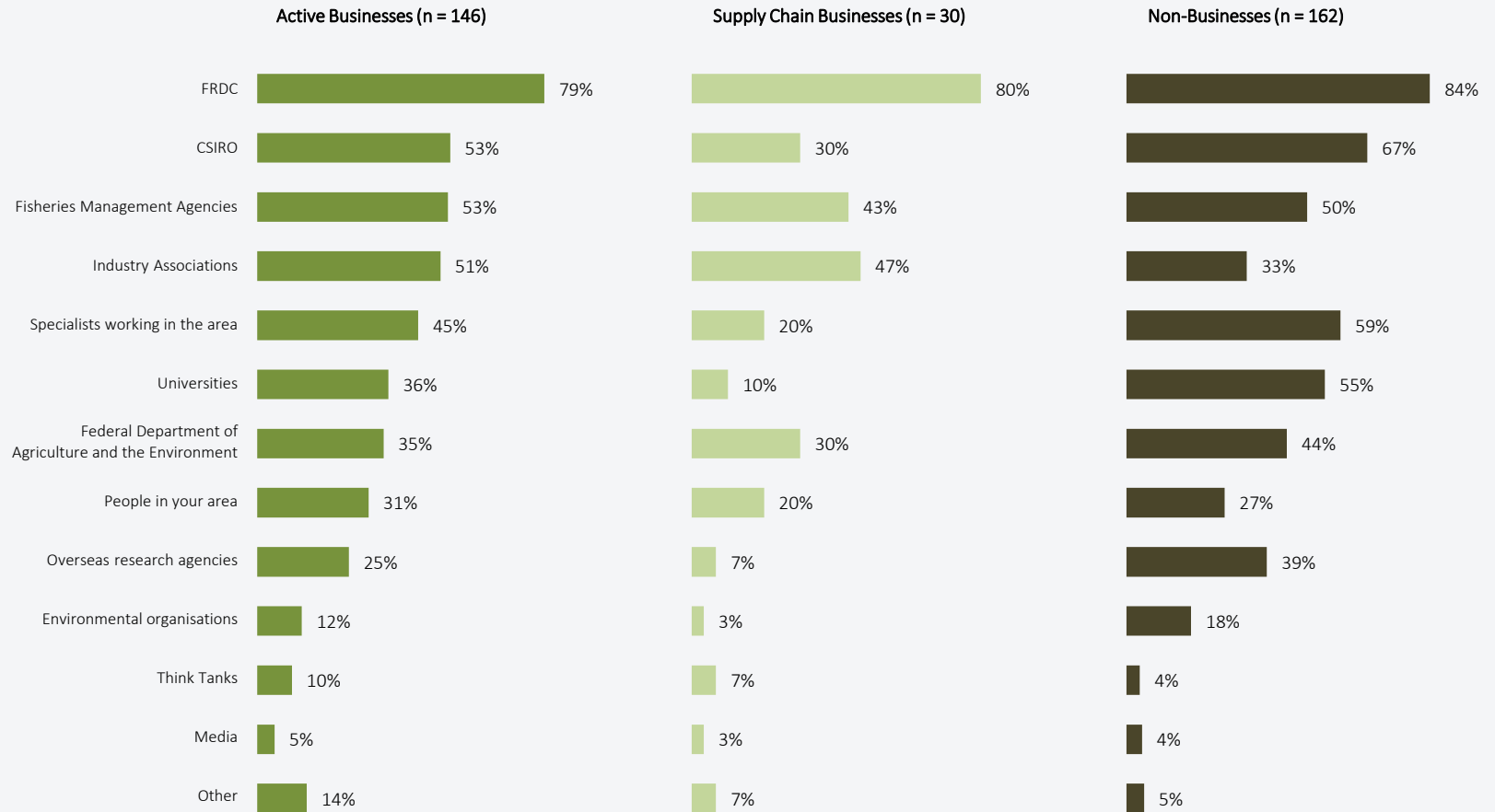
Supply Chain Businesses (n = 34)

Non-Businesses (n = 162)



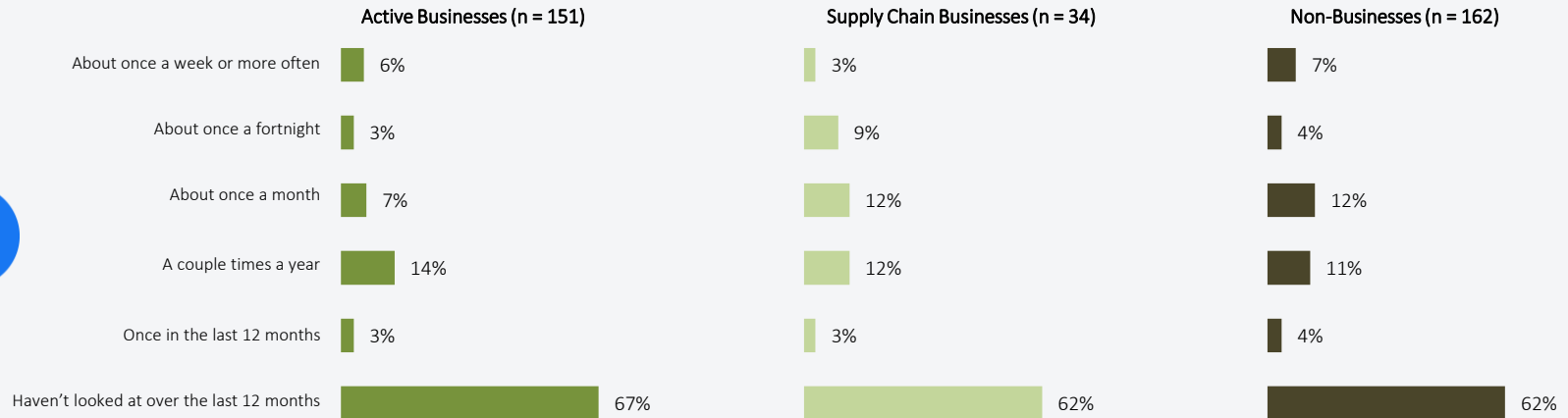
What agencies/organisations do you trust to provide you with the most up to date information about research (planned and completed research) that relates specifically to the fishing and aquaculture sectors?

Asked to all respondents who look for information about research relating to the fishing and aquaculture sectors.

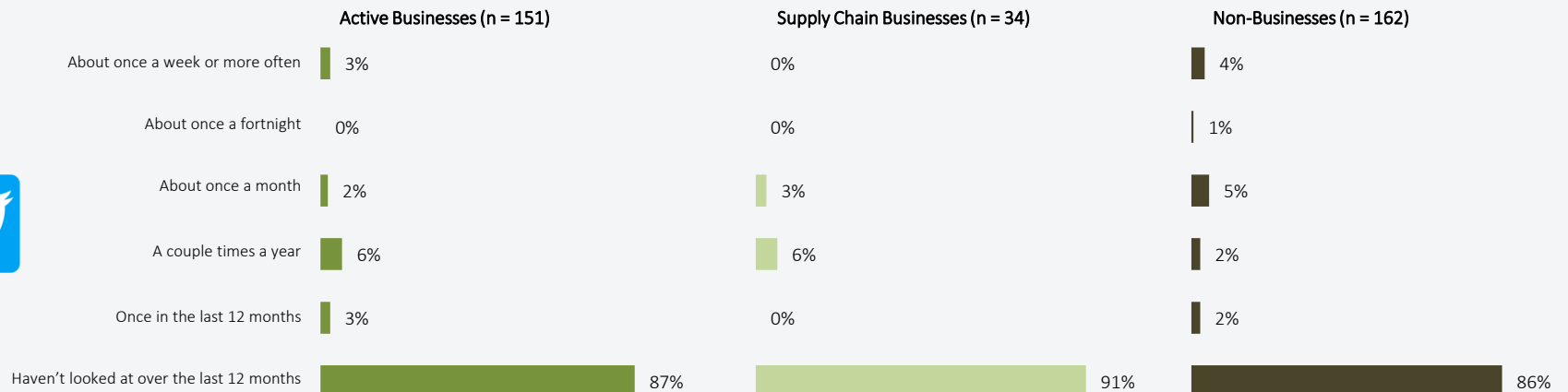


# Use of FRDC information channels

FRDC publish information on their own Twitter and Facebook pages. Over the past 12 months, how often have you looked at information on these FRDC social media feeds?  
 Asked to all respondents.



Results from 2018 research (% viewed in the last 12 months): Commercial Fishers: 22% Non-Commercial Fishers: 34%



Results from 2018 research (% viewed in the last 12 months): Commercial Fishers: 4% Non-Commercial Fishers: 15%

FRDC publish information on their own Twitter and Facebook pages. Over the past 12 months, how often have you looked at information on these FRDC social media feeds?  
 Asked to all respondents.

Active Businesses (n = 151)

Supply Chain Businesses (n = 34)

Non-Businesses (n = 162)



OR



35%  
 Have viewed either of the  
 FRDC social media pages  
 in the past 12 months



38%  
 Have viewed either of the  
 FRDC social media pages  
 in the past 12 months



41%  
 Have viewed either of the  
 FRDC social media pages  
 in the past 12 months



*Translation to change*

Of the 35% of active business respondents who have viewed FRDC social media:

38% indicated that they:

- o learnt something new for their business; or
- o introduced new systems, technologies or approaches

*Translation to change*

Of the 38% of supply chain business respondents who have viewed FRDC social media:

38% indicated that they:

- o learnt something new for their business; or
- o introduced new systems, technologies or approaches

*Translation to change*

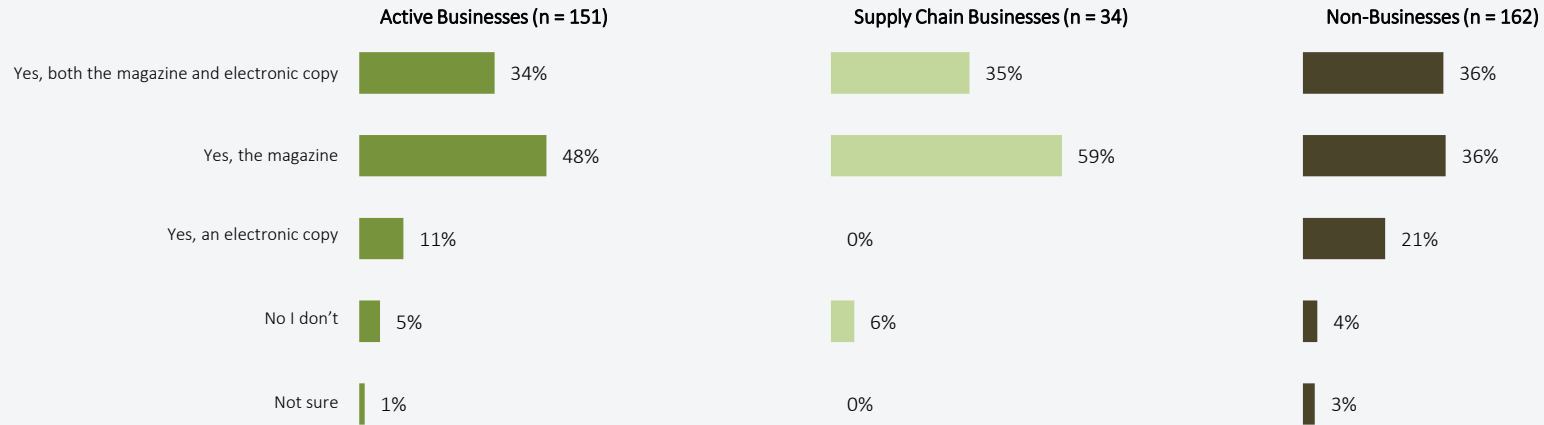
Of the 41% of non-business respondents who have viewed FRDC social media:

68% indicated that they:

- o learnt something new for their organisation; or
- o introduced new systems, technologies or approaches

# Use of FRDC information channels

FRDC produces the quarterly FRDC FISH magazine. Do you receive the FRDC FISH magazine?  
 Asked to all respondents.



*Translation to change*

Of the 93% of active business respondents who reported they receive the FRDC FISH magazine:

54% indicated that they:

- o learnt something new for their business; or
- o introduced new systems, technologies or approaches

*Translation to change*

Of the 94% of supply chain business respondents who reported they receive the FRDC FISH magazine:

56% indicated that they:

- o learnt something new for their business; or
- o introduced new systems, technologies or approaches

*Translation to change*

Of the 93% of non-business respondents who reported they receive the FRDC FISH magazine:

88% indicated that they:

- o learnt something new for their organisation; or
- o introduced new systems, technologies or approaches

Results from 2018 research (% who receive the FISH magazine): Commercial Fishers: 91% Non-Commercial Fishers: 86%

Are there any other areas or topics or content that you would like to see included in the FISH magazine? What's not in there that would make it more interesting to you as a reader?  
Asked to all respondents who receive the FRDC FISH magazine.

## 45% - Nothing / Happy

21% - Nothing / no comment  
13% - Good as it is / nothing else

## 14% - Research related

9% - Stories related to research projects  
5% - Case studies

## 12% - Sector specific

12% - Stories about specific sectors

## 11% - People profiles

11% - Stories related to people

## 11% - Business related

5% - Stories related to business management  
4% - Stories related to marketing  
3% - Stories related to industry

## 8% - Community and climate

5% - Climate change stories / sustainability  
3% - Community related stories / for community

## 3% - Successes and outcomes

3% - Details of successes / register of past outcomes

## 2% - Don't read it

*"Generally I am impressed at the diversity of stories and subjects that the magazine covers. I would like a bit more writing sourced from those critical of areas of improvement needed in commercial fishing and aquaculture. Some great science recently about contribution of MPAs to fisheries. Apologies if I have missed the articles but is this topic a non-go area for FRDC magazine. Where was the why catch 'less fish' alternative in the December 2019 catch more fish story. Why do we keep in using MSY as the holy grail when greater % unfished biomass provides for increased marine ecosystem resilience? TACC based on MSY will not wash with the community for ever. They will demand more resources swimming around. Loved the stories about overseas visits by young Aussie seafood leaders too."*

*"Interviews and stories from fishers, stakeholders, deckies and all from all different fisheries large and small all across the country or even those from overseas finishing off with hearing their fears and concerns and what they believe could help them personally and then secondly as an industry. Polling of simple questions. Would be interesting and quizzes on all different fishing industries could help some deckies and all possibly brain sponge understand things easier More reliable research information and possibly a page where fishers can have their say possibly on previous articles or upcoming current issues."*

*"Yes, Aquatic habitat. FRDC must have a stewardship role in improving understanding of the relationship between aquatic habitat and fisheries productivity. We need to avoid the situation where farmers see that their future prosperity lies in tree clearing, by strengthening the understanding across the whole community of the links throughout the natural system that are required for wild harvest fisheries productivity. This includes aquaculture which can and often does have a negative impact on aquatic habitats and ecosystems."*

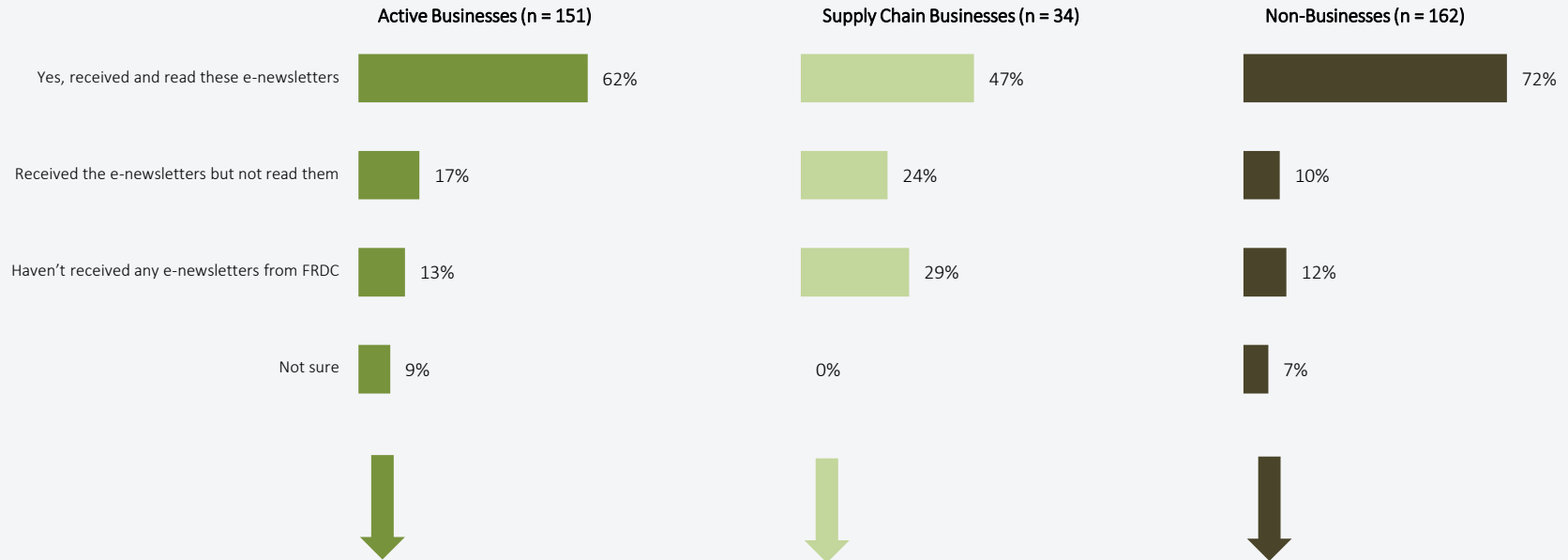
*"If FRDC can introduce investment opportunities or allow investors to introduce themselves (and their business intention) that will help stimulate communication with R&D providers, and eventually industry development. Alternatively, FRDC could organize Investment Forum annually and try to attract foreign investors who have both market access and preferably technologies or know-how that Australia need."*

*"Important gaps in Australia, and in FISH are: (1) More stories on operations which have had SUSTAINED success. The stories often focus on a short-term success. (2) I support having some stories on where eNGOs and industry have worked together (3) FRDC's services - for example, I find the trade data of immense value - and would be of real interest if reported well."*

*"Some ideas or ways to improve business in customer service and product knowledge to help customers understand more about certain products, if they go to the butcher the know what meat to get and how to cook it, they usually stick to what they know, if they could know about more about different cooking methods for different types of fish."*

FRDC produces e-newsletters. Over the last 12 months have you received and read these e-newsletters?

Asked to all respondents.



*Translation to change*

Of the 62% of active business respondents who reported they received the FRDC e-newsletters:

39% indicated that they:

- learnt something new for their business; or
- introduced new systems, technologies or approaches

*Translation to change*

Of the 47% of supply chain business respondents who reported they received the FRDC e-newsletters:

42% indicated that they:

- learnt something new for their business; or
- introduced new systems, technologies or approaches

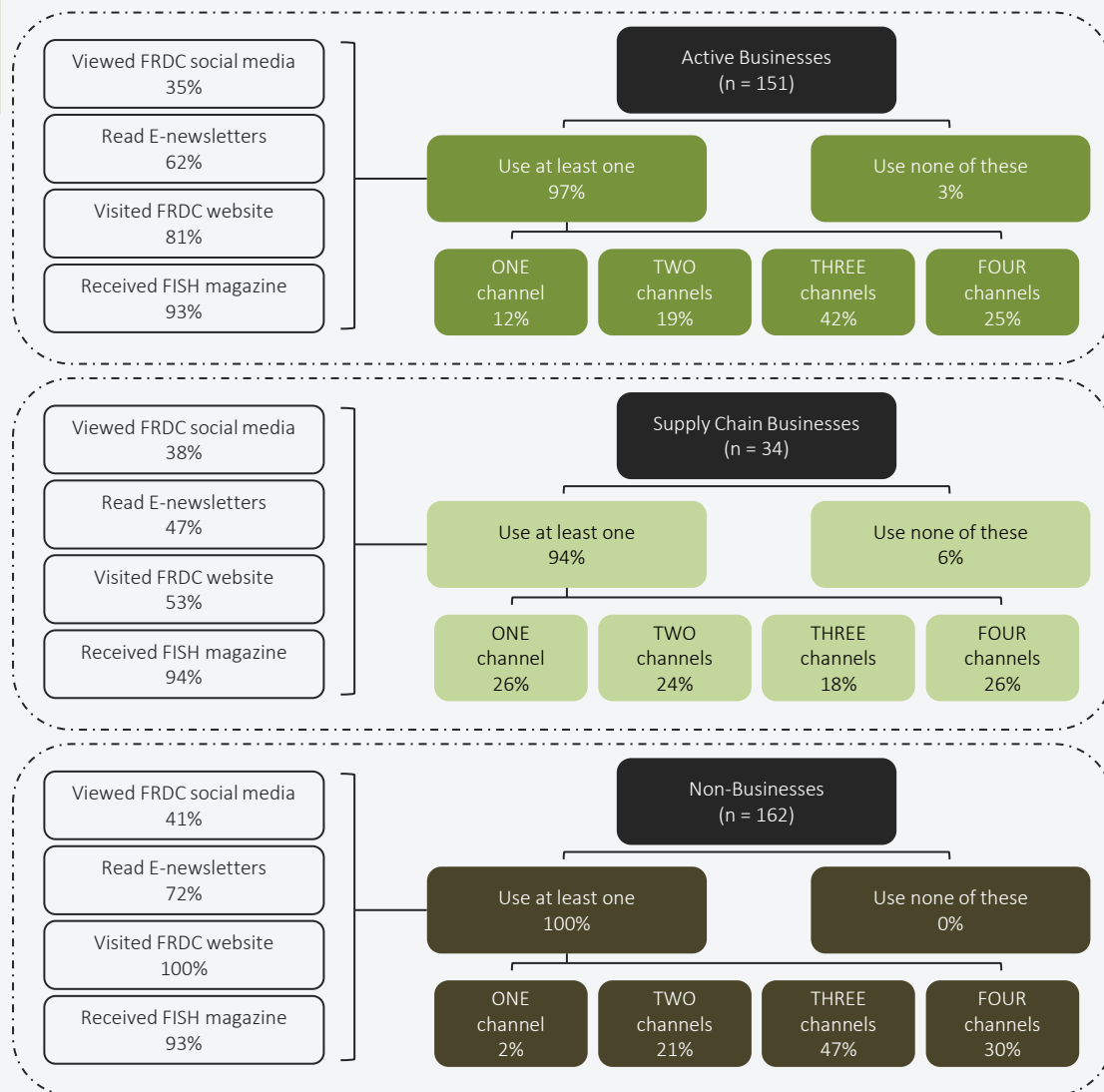
*Translation to change*

Of the 72% of non-business respondents who reported they received the FRDC e-newsletters:

83% indicated that they:

- learnt something new for their organisation; or
- introduced new systems, technologies or approaches





One of the challenges facing all RDCs is engaging stakeholders to enable sharing of information, resources and tools and providing a mechanism for creating visibility of the outcomes being achieved from the investment made by industry and Government.

The 2020 Stakeholder Research explored the reach achieved by the various FRDC communication channels.

The results opposite show that:

- Collectively the use of social media, e-newsletters, website and FISH magazine have enabled FRDC to reach most stakeholders.
- While reach provides one level of success, it doesn't necessarily translate to consumption or use of the available resources.
- That said, the baseline results provide some reassurance that there is, at this time, the opportunity being created for messages to be shared across the various stakeholder cohorts.



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## Stakeholder engagement with FRDC

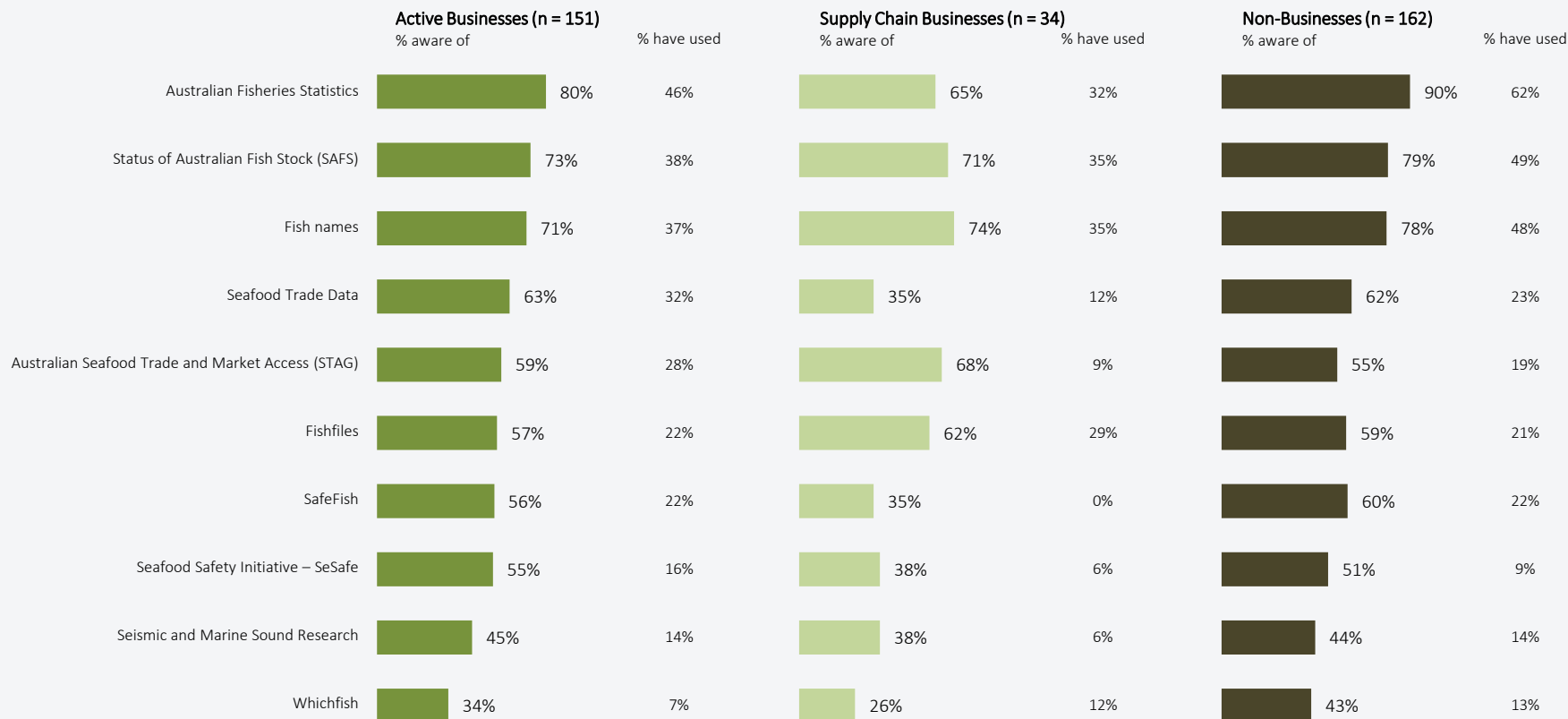
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# Use of FRDC engagement opportunities

The next questions look to understand what FRDC information, services, activities and conferences you have used or been involved with over the last few years.

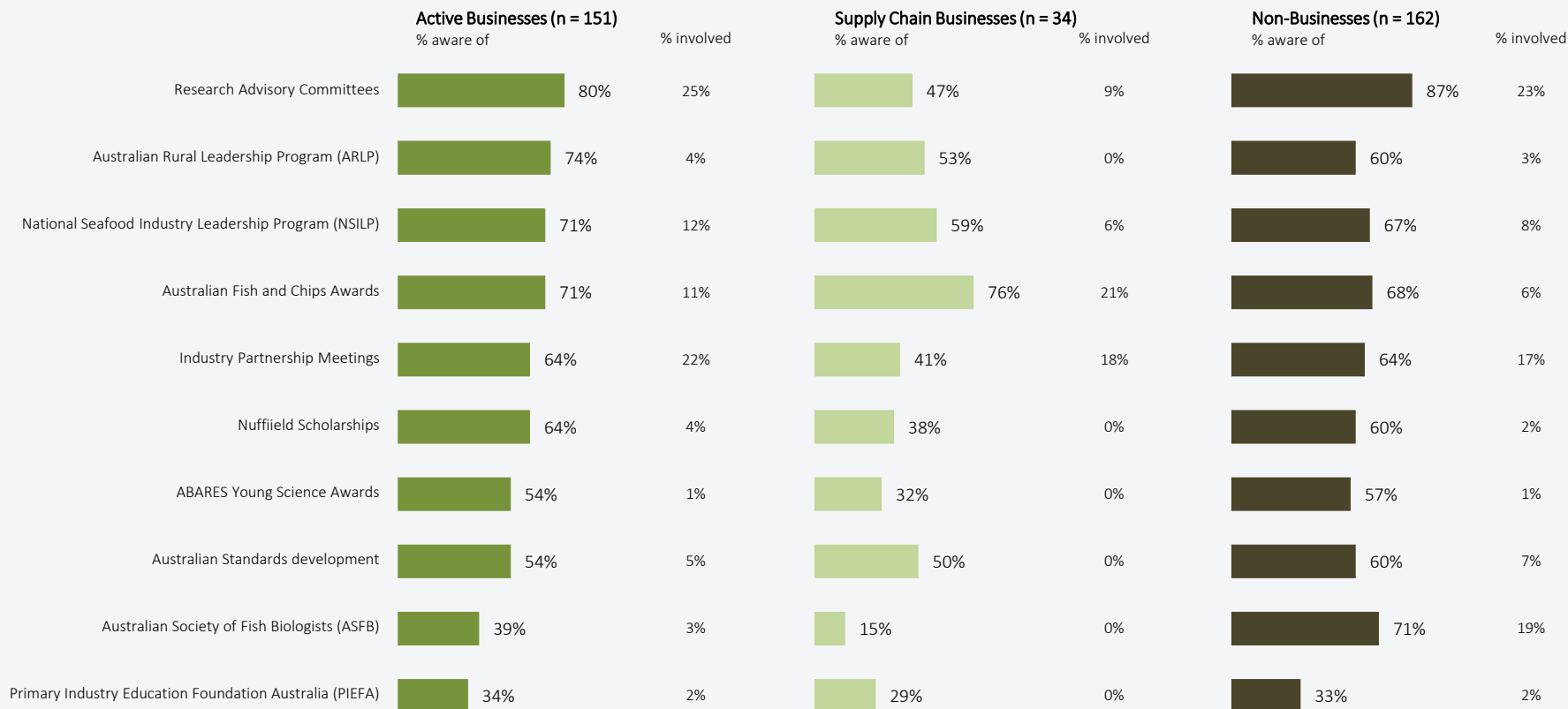
Over the last two years have you used any of the following?

Asked to all respondents.



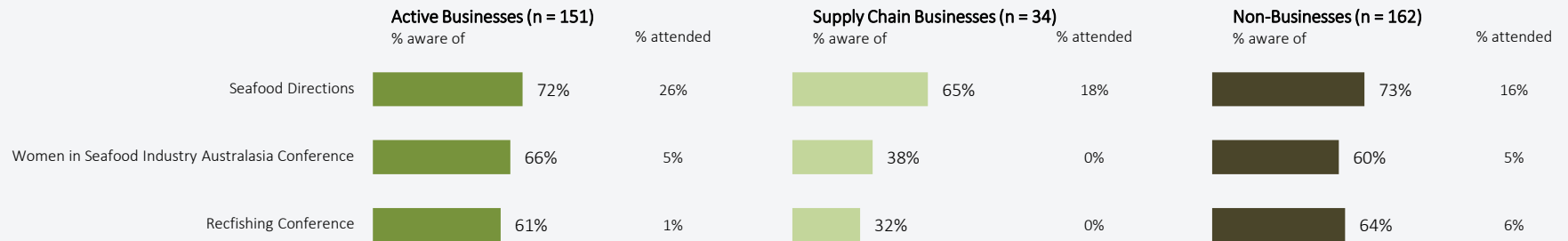
# Use of FRDC engagement opportunities

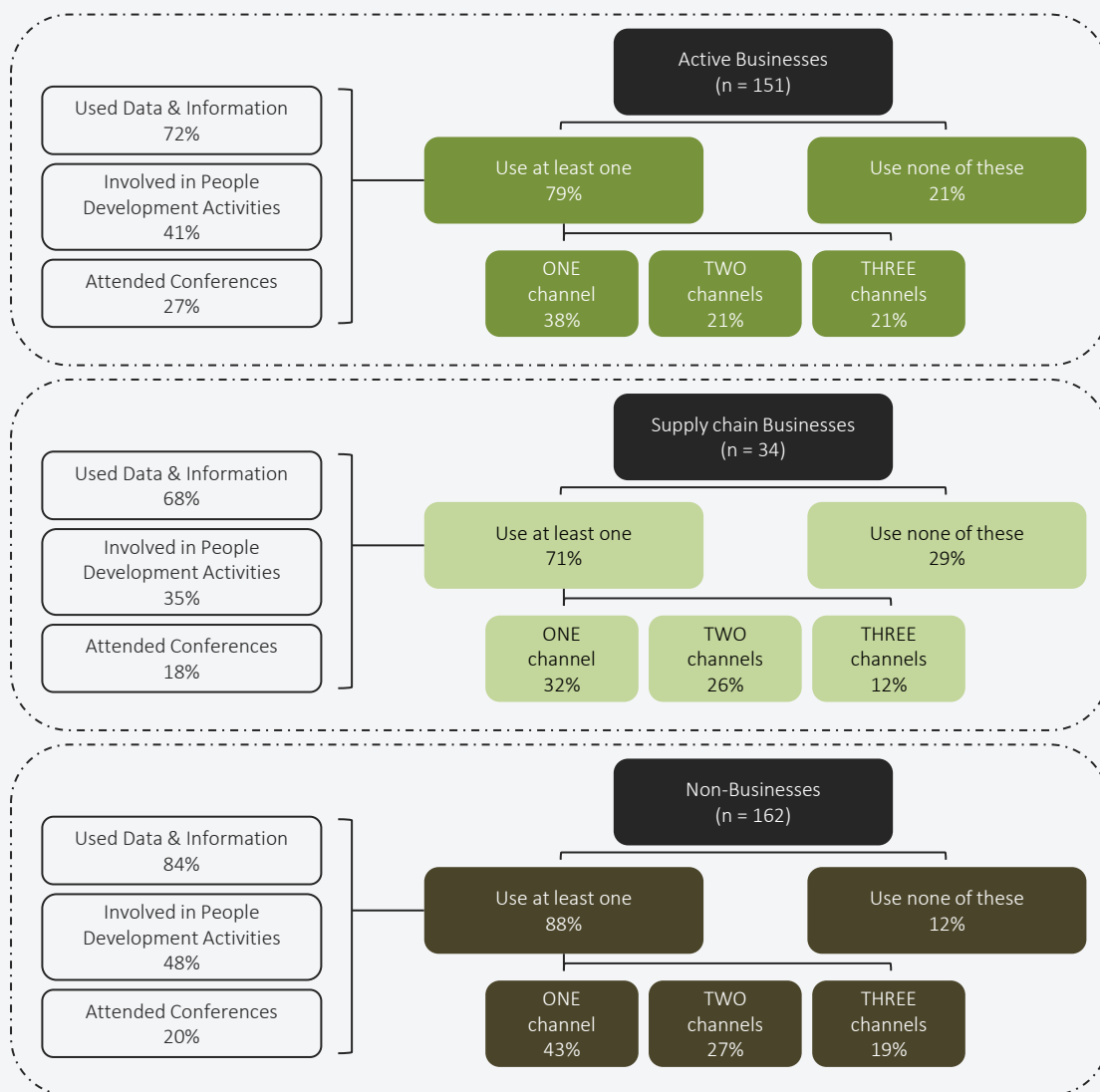
Over the last two years have you been involved in any of the following FRDC sponsored People Development activities?  
 Asked to all respondents.



# Use of FRDC engagement opportunities

Over the last two years have you attended/participated in in any of the following FRDC sponsored Conferences?  
 Asked to all respondents.





FRDC provides industry and other stakeholders the opportunity to engage directly through the provision of:

- Data, statistics and other industry specific information;
- Activities and events through the People Development activities; and
- Support of industry conferences.

The 2020 FRDC Stakeholder Research explored engagement across these three engagement channels. From the feedback provided, we note that:

- Respondents to the survey reported a strong level of uptake of at least one of these engagement opportunities.
- Most respondents reported being involved with just one of these opportunities, with the use of data, statistics and industry information the most likely opportunity utilised.

Again, the collective reach of these engagement opportunities looks to have achieved some success in reaching a majority of industry stakeholders. As noted previously however, this will not necessarily translate to satisfaction with the experiences nor an immediate translation to practice change. It does however provide an important first step in activating strong outcomes from FRDC engagement.



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**Feedback on the FRDC website**

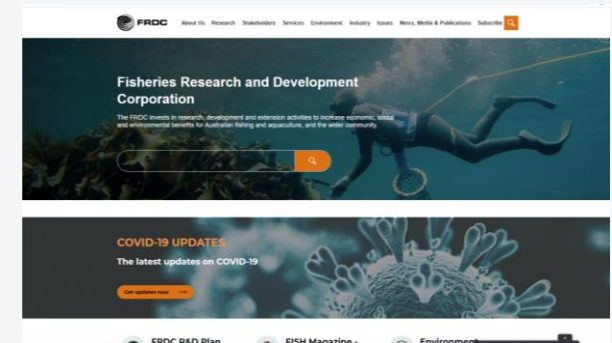
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One of the aims of the 2020 FRDC Stakeholder Research was to obtain feedback about the expectations, needs of, and experiences stakeholders have had with the FRDC website.

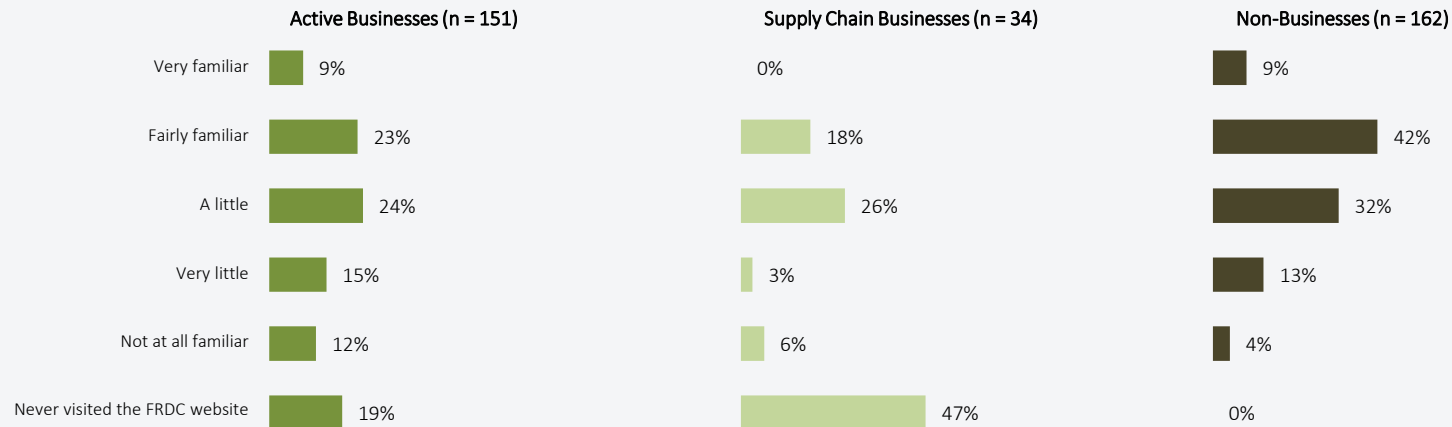
As the corporate website is about to undergo a refresh, the research provided a good opportunity to seek feedback from stakeholders.

The feedback sought covered identifying the main motivations for coming to the website, satisfaction with the content and information on the current site, other content sought by stakeholders, experiences with various aspects of the website and any other functionality required by stakeholders.

An overview of the feedback provided specific to the FRDC website now follows.



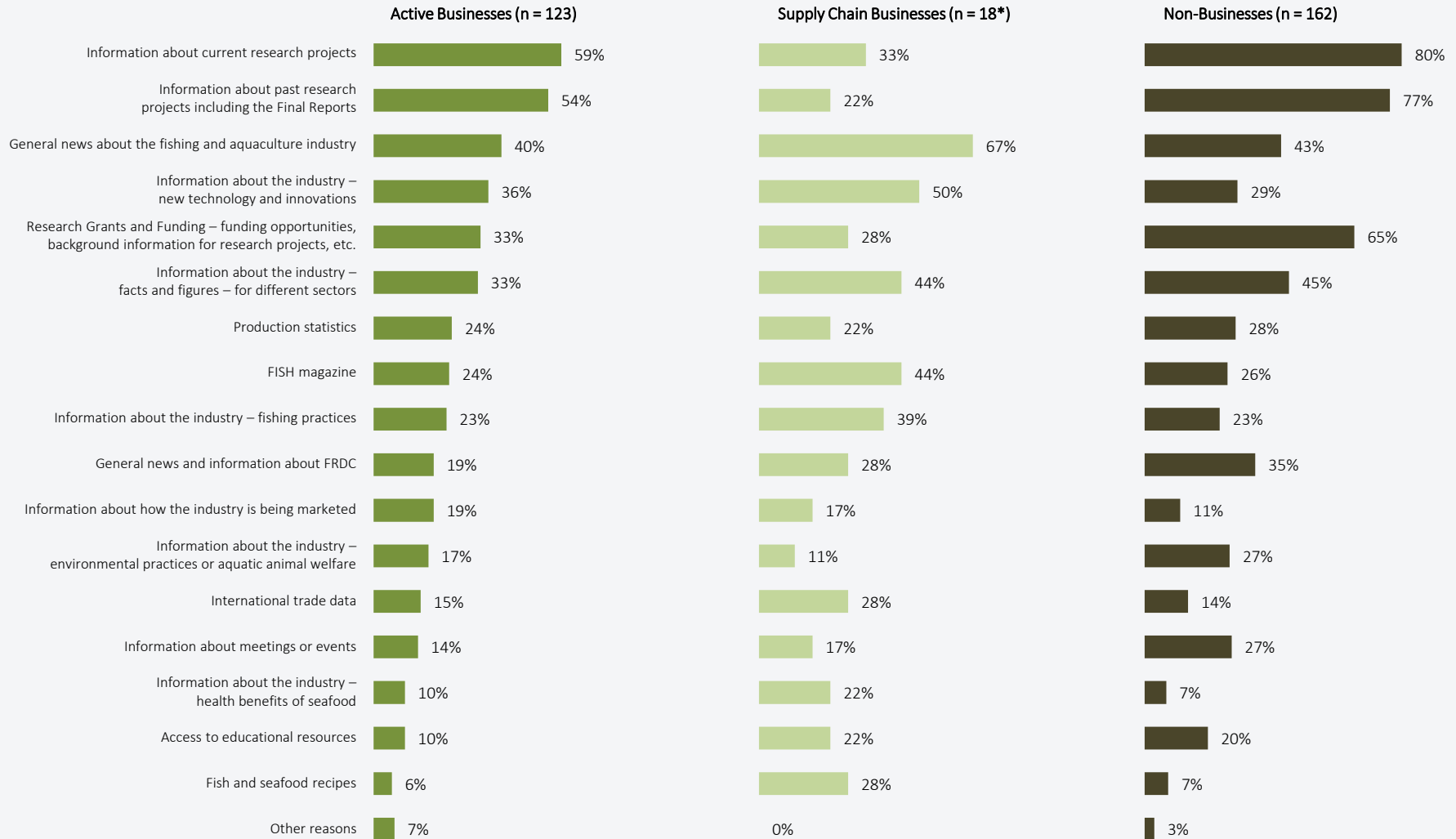
How familiar are you with the range and breadth of information, resources and tools that are available on the website frdc.com.au?  
Asked to all respondents.





## What are the reasons you come to the frdc.com.au website?

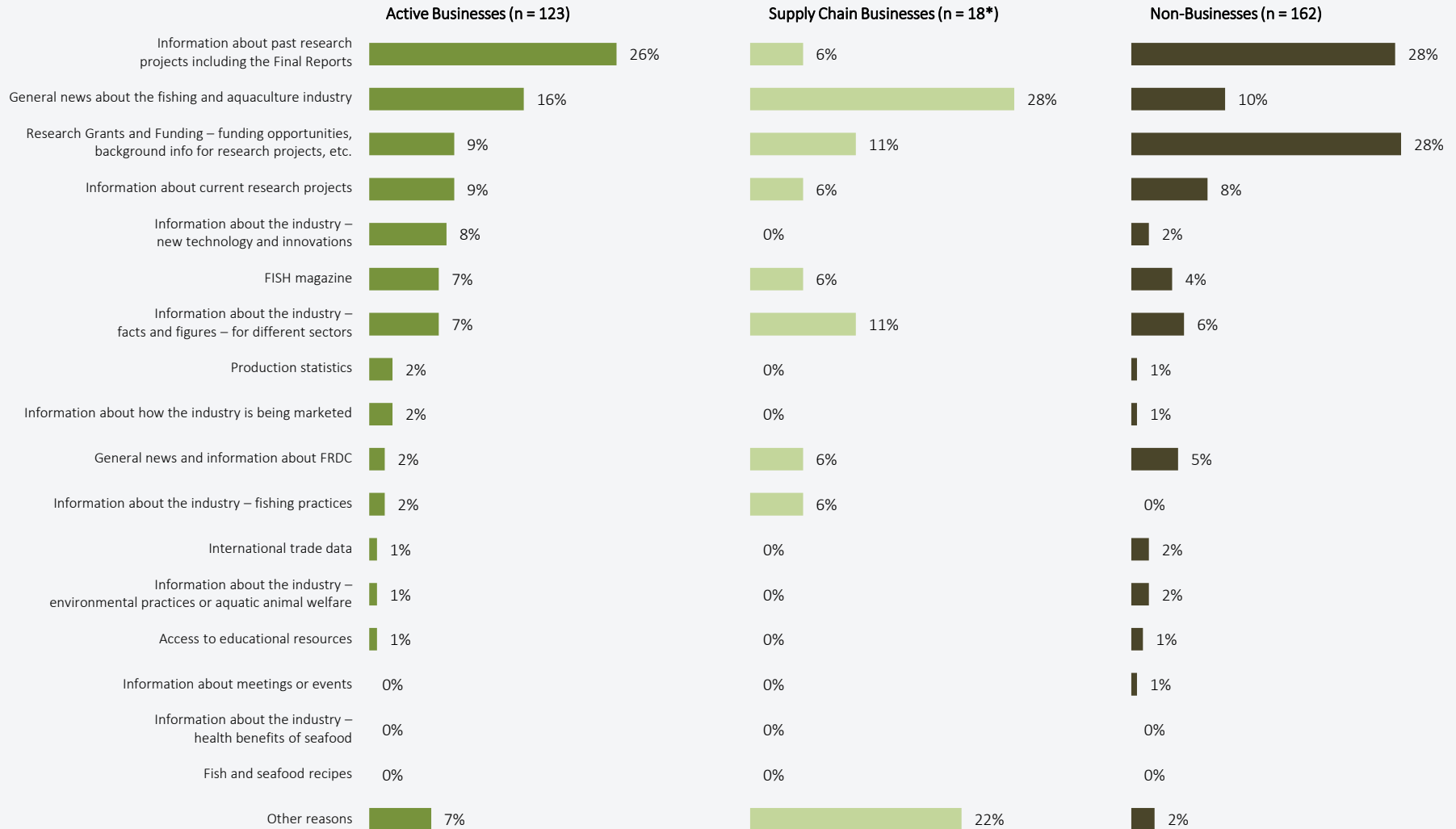
Asked to all respondents who have visited the FRDC website. Multiple choice question.



\* Small sample size (n < 30). Results are indicative only.

Which of these would you say is the main reason you come to the frdc.com.au website?

Asked to all respondents who have visited the FRDC website.



\* Small sample size (n < 30). Results are indicative only.

Thinking now about the content / the information available on the website, how satisfied are you that the information is:

Asked to all respondents who have visited the FRDC website.



\* Small sample size (n < 30). Results are indicative only.

Is there any other content or information that you would like to see added to the website? Please provide a full description of what other information you would like to see added.

Asked to all respondents who receive the FRDC FISH magazine.



## What they said. . . .

*"When I went in to look for future research projects, they weren't up to date, so they said they have not been completed. A lot of the stuff in that timeline, projects that should've been completed have not been completed and those that did, did not say who it was completed by."*

*"More information on the FRDC funding process - i.e. how are industry involved? How are gov. departments involved? Who comes up with the project ideas? How can you submit a project idea? Links to working groups that are cross-jurisdictional. Links to fisheries working groups."*

*"There is potential to be if you are a commercial member it would be good to have more links in the industry and specifics sides to the industry instead of being generic and more contact information eg. industry login, bona fide, more additional information."*

*"I was going to ask for a network map of researchers and organisations from past and current projects to show main actors in each field and their linkages to each other, but the 'entity map' under the beta project search tool is a very good start."*

*"There could be more interactive information that illustrates how assessment tools work re: Toolbox, and how outputs (from model-based and empirical analyses) can translate into evidence-based management decisions and fishery performance outcomes."*

*"There use to be a program that you get that listed all the fish names that are available in NZ and Australia from Seafood Services Australia, just want to know if you can have it hosted on the website for fish name and to identify the fish."*

*"I mostly access the website for information on current and past research including final reports and these are usually available or provide sufficient information for me to be able to look further afield for the information I am seeking."*

*"My only disappointment is Fish Stats is so far out of date - but that is not FRDC's fault and the Trade Data and brief ABARES Updates partly address it."*

*"Better search functionality; being able to find all funded projects (some /many are missing); more direct links within the website - sometimes it takes a long time to find the information"*

*"It is very hard to search for final reports on the website. The search function often delivers an incomplete list of projects. It is clunky to then get access to the reports."*

*"Promotion of the commercial fishers in articles - Commercial fishers state by state - each week high light a fisher and how that fisher harvests the species he catches."*

*"Market pricing information is gold. Fushserve in NZ is bloody awesome and I know it's not your area...but that's what we need to see product and asset values better."*

*"My focus is primarily on Final Reports, and apart from the searching capability, which is confusing, I think your repository is both excellent and necessary."*

*"sustainability articles that are thoroughly researched by writers with experience on farm/ interaction on article would be good//"*

*"When new projects are put up would like to see what has been done in the past that are similar or relate to past projects"*

*"Current information not data that is so old as to be useless. Trend analysis Effect of currency fluctuations on sales."*

*"Lists of the industry stakeholder organisations funded each year, and the research agencies involved in funded research."*

*"recognise the approach is dynamic and it is that approach that will add things as a matter of course as times goes on //"*

*"Better clarification of what drives the priorities and if there are opportunities outside the described priorities."*

*"Be good for the research section to be split into disciplines (e.g. stock assessment, health, management etc.)"*

*"An interactive map that allows you to click on areas or fisheries of interest and access relevant information"*

*"I would like to see research and technical production information on Marron and aquaculture pond management//"*

*"Links to websites about ecosystem based management initiatives and benthic / pelagic ecosystems mapping"*

*"CPU data, sustainability, better understanding of fish migration/ seasonal/ yearly data variation"*

*"specifics around the indigenous sector and the projects that are getting support from the FRDC"*

*"Mapping and spatial data of registered Indigenous interests - just like IPA and NNTT maps."*

*"A clear understanding and summation of the Industry including the history. Data!"*

*"More around aqua culture rules and regulation resources relevant to Australia."*

*"More authentic information, less Government corporate, more Industry corporate"*

*"keep it progressive and keep improving if each year - doing a good job though"*

*"International Trends. Emergent species, markets, methods. New technology."*

*"more out in the field studies and more info on vessel technologies"*

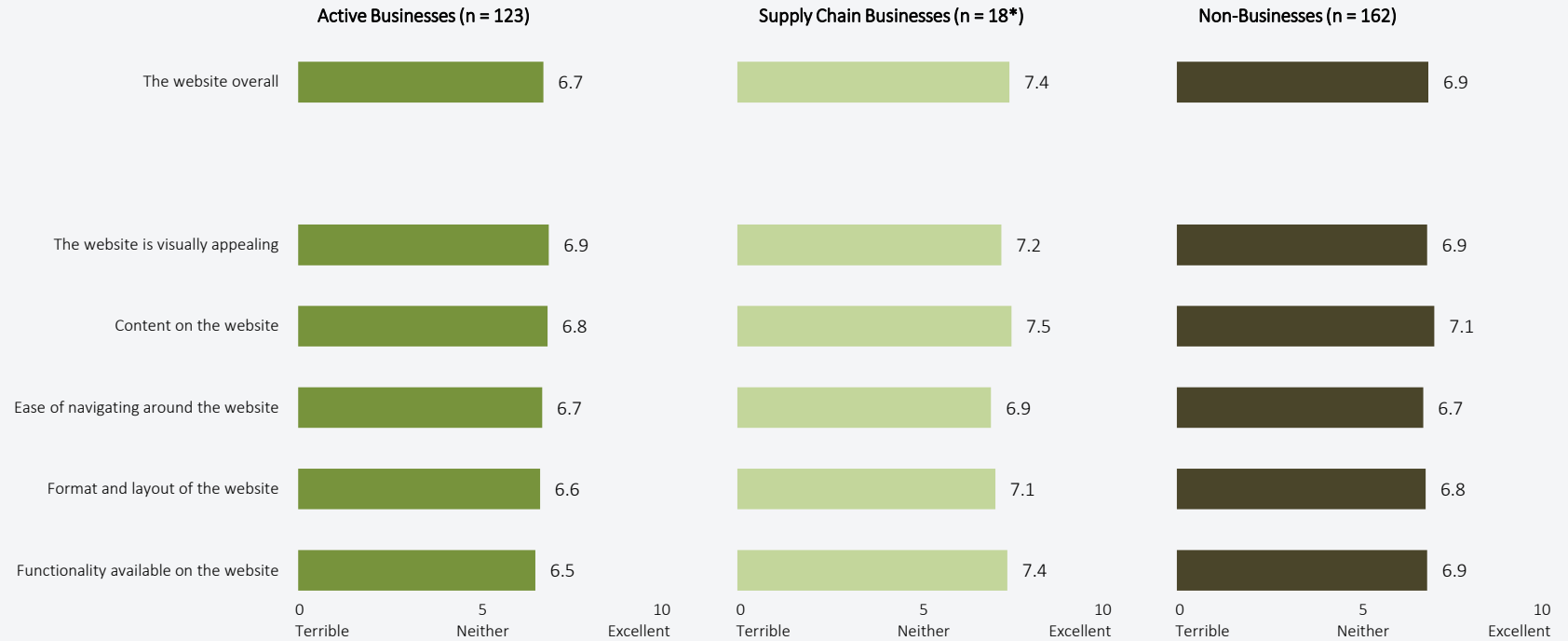
*"more information on reef research and commercialization projects"*

*"A link to historic research for major research issues."*

*"more about climate change affect on fisheries"*

*"organized by themes linked to the R&D plan"*

On a scale of 0 to 10 where 0 is “Terrible” and 10 is “Excellent”, overall across all your experiences with the frdc.com.au website, how would you rate the website regarding the following:  
 Asked to all respondents who have visited the FRDC website.



\* Small sample size (n < 30). Results are indicative only.

Is there functionality not available on the website that you would like to see on the website? That is, what would you like to be able to do that you can't do now? Please provide a full description of what other functionality you would like to see added, and if known, some example of websites that have this functionality.

Asked to all respondents who receive the FRDC FISH magazine.



## What they said. . . .

*"There should be direct links to any other material that is referenced on the page. There are too many examples of content that refers to other material, without a link to that material, or with links that are outdated and not working. There are also issues with the way the site displays in some browsers on some occasions. For example, today, using chrome, the headings appear over the content each time you scroll down, so you can't actually read any content. Better nesting of structure."*

*"frustrating to locate information on particular subjects, clunky to find certain things, takes time to navigate, could categorize their data in an easier way to find. easier searching to find reports on particular subjects. Currency of the website with uploading research reports publications, not always sure they are recent, may have been completed a year or so before publication so its not always up to date or they are not available as soon as they could be."*

*"The search facility in the final reports repository appears rudimentary, one often ends by browsing through many to find the ones one wants. Improvement of that would be useful. As I primarily visit the final report section I have bookmarked that so the functionality of the rest does not apply to me. Perhaps you could improve understanding concerning the range of information on the website?"*

*"Nothing comes to mind. The FRDC website needs to house ALOT of data. If its reformatted so that functionality is sacrificed to deliver on aesthetics it'll make it harder for industry to use. Industry & R&D providers are probably its greatest audience. Fish and SAFS talks to both the public and industry"*

*"Can be difficult to find information of you don't really know the specifics of what you are looking for (e.g. key words). Some details are pretty old (e.g. no WSSV projects since 2016)"*

*"Manipulation of species image magnification (zoom in or out). Thumbnail images are invariably useless for identity purposes. See <https://www.southernseafood.com.au>."*

*"More accurate search function to quickly identify relevant final project reports, i.e., to incorporate key words in the executive summary etc."*

*"the search engine could be more detailed - when you type for specific areas for particular fisheries or research"*

*"I find the search function for past FRDC reports is 'clunky' bit that could be the way the metadata is entered"*

*"Better functionality with the search engine for looking through library/database - better search functions"*

*"Search can be a little difficult. hard to hit just what you want, got to get the search words just right."*

*"the change in the last two week has made a big difference in the positive ie search function and reports"*

*"make comments or interaction that can give writer direct feedback (can be private)"*

*"being able to give feedback and comments - open discussion at the end of articles"*

*"A directory through specific people in and industry login."*

*"The website is very busy with a lot of information on it"*

*"FishNet is difficult to navigate and should be improved"*

*"Real data. Markets, resource, environment. Quantify!"*



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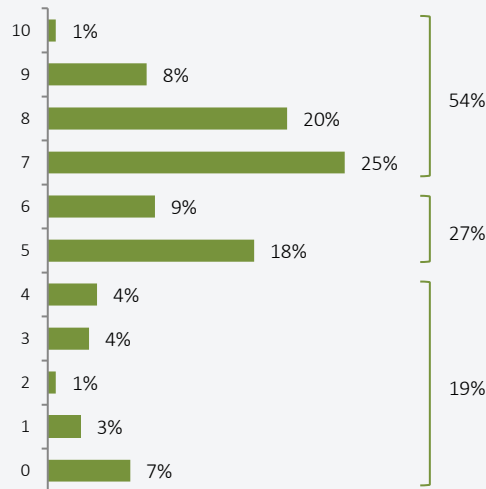
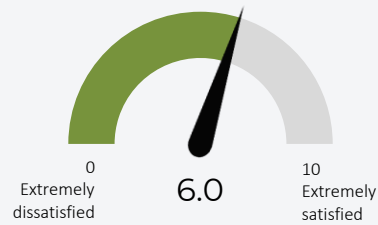
**Stakeholder satisfaction**

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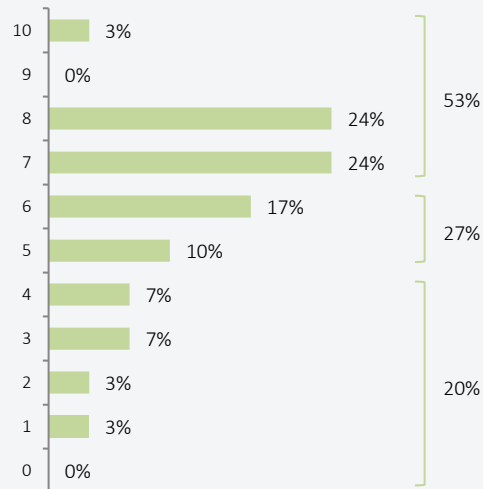
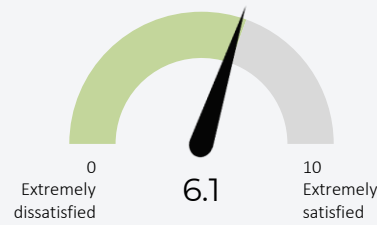
Taking into account all of the things that we have discussed so far, overall how satisfied are you that contributions from industry and Government to FRDC are being invested wisely and for the benefit of the industry?

Asked to all respondents (excluding "Don't know" answers).

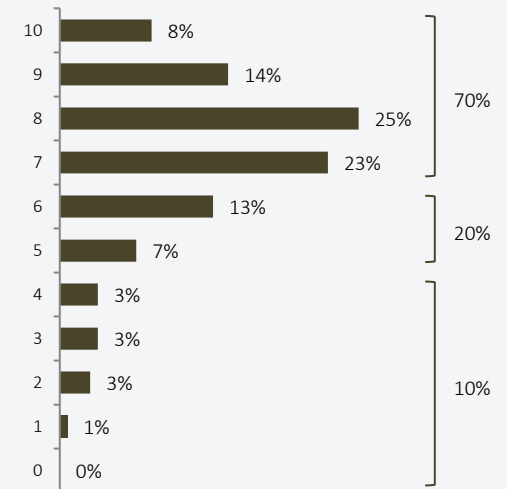
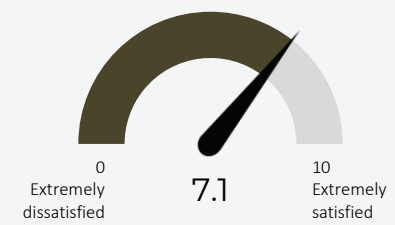
## Active Businesses (n = 142)



## Supply Chain Businesses (n = 29\*)



## Non-Businesses (n = 153)



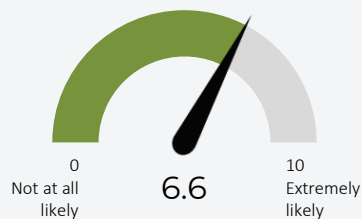
Results from 2018 research (mean satisfaction): Commercial Fishers: 6.2 Non-Commercial Fishers: 6.8

\* Small sample size (n < 30). Results are indicative only.

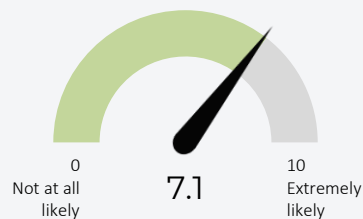


How likely would you be to recommend FRDC to other people and businesses in the fishing industry?  
 Asked to all respondents (excluding "Don't know" answers).

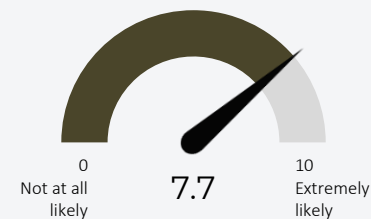
Active Businesses (n = 145)



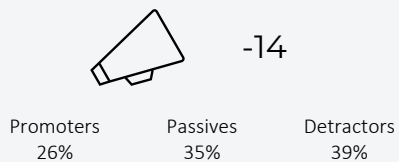
Supply Chain Businesses (n = 29\*)



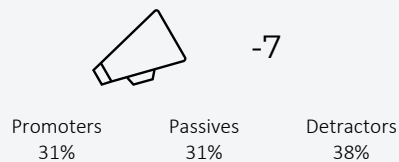
Non-Businesses (n = 155)



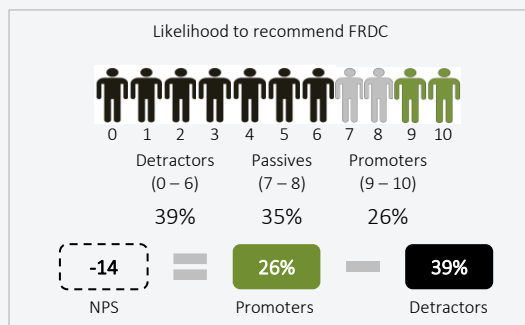
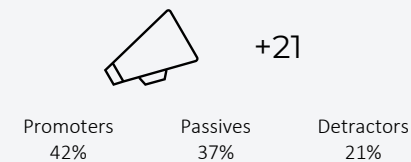
Net Promoter Score



Net Promoter Score



Net Promoter Score



### What is Net Promoter Score (NPS)?

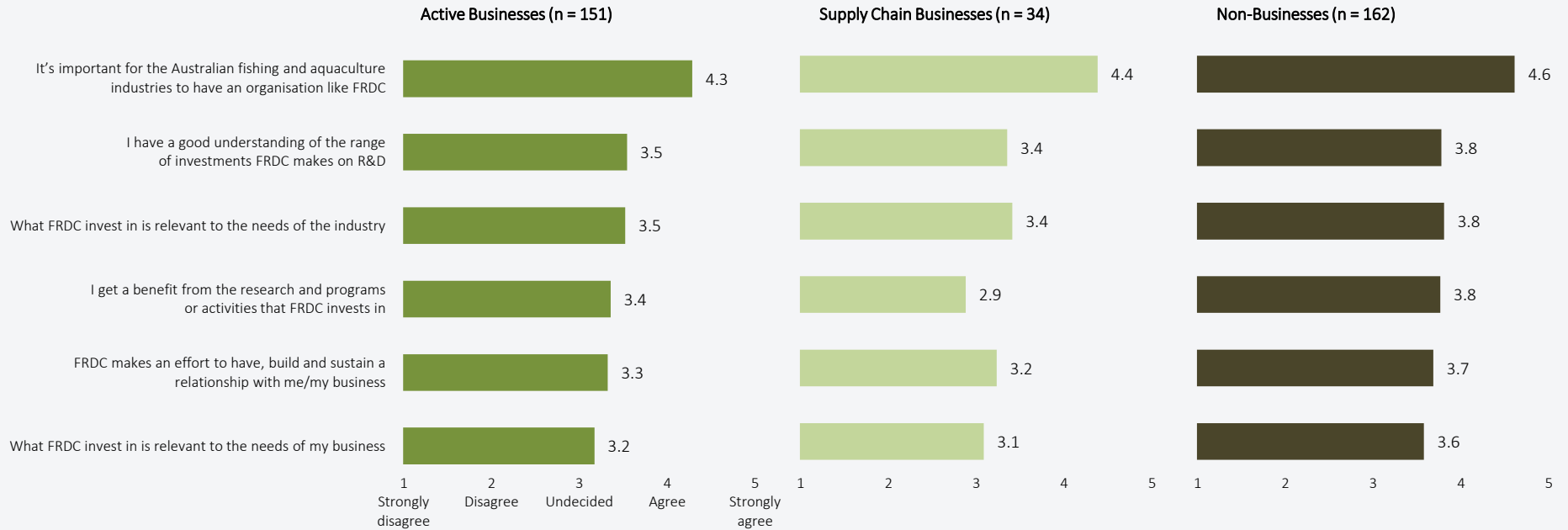
NPS stands for Net Promoter Score which is a metric used in customer experience programs. NPS measures the loyalty of customers to an organisation. NPS scores are measured with a single question and reported with a number from -100 to +100, where a higher score is desirable.

Results from 2018 research (mean advocacy): Commercial Fishers: 6.3 Non-Commercial Fishers: 7.2

\* Small sample size (n < 30). Results are indicative only.

Thinking in general about FRDC, to what extent do you agree or disagree with the following statements?

Asked to all respondents.



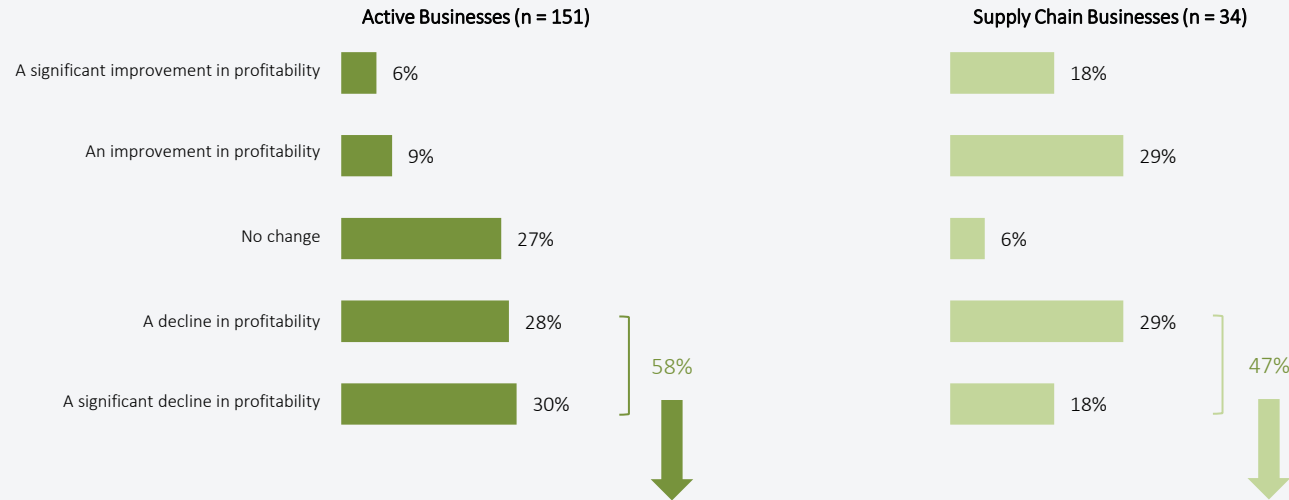


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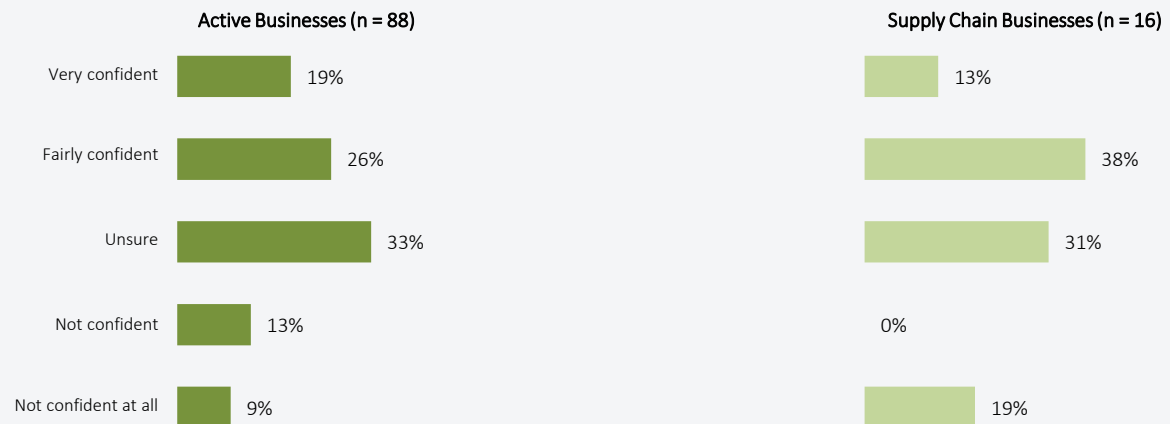
## Economic impact of COVID on seafood businesses

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How has COVID-19 impacted the profitability of your seafood business? Have you experienced...  
 Asked to all Active and Supply Chain respondents.



How confident are you that your seafood business will return to the profitability levels you were at pre COVID-19? Would you say you feel...?  
 Asked to all Active and Supply Chain respondents who have experienced a decline in profitability.



What one or two factors related specifically to COVID-19 most impacted the bottom line for your business over the period January – June this year?

Asked to all Active and Supply respondents.



What they said. . . .

*"The absolute lack of support for fishers by the Fed government and State govts. Hardship grants were so stiff to qualify and the amounts offered were miserable. What it showed me is the fact as of today we have been screwed over by only one market in Asia. China and the depth of the financial support it holds over processors. Whilst we are under the communist party of China and the control it has over our fishing industries we will never be able to move to other Asian markets when they provide financial support and control over our various fisheries. The current trade barriers from China on rock lobster is just a political measure to make sure we tow there line and been good buddies. The aim is to hurt small business so pressure will be put onto the Fed government to stop calling out policies of communist China, like Hong Kong unlawful detention of Muslims. How can you deal with a nation that kills and runs over its own people with tanks?"*

*"Our business has been severely impacted. 52% of our cashflow is from export of live fry. We are now completely dependent on domestic sales. It does look like we will be able to ship to Hong Kong and Singapore, but the USA and Europe will be very difficult, and probably won't happen this production season. Malaysia is our biggest customer, and it looks like we will have a big hit here because they have not been able to move their finished product, Therefore will not need new season fry."*

*"the biggest problem that i have encountered in my 60 years of commercial fishing is the mismanagement of commercial fisheries ,gulf of carpetaria and rock lobster is mismanagement of fisheries brought to theri knees my mismanagement ,then leaving industry to sort out the trainwreck has frdc ever been involved i seeking compensation when fishers have had their access diminished or removed NO he funds allocated to frdc should have gone to building more hospitals in australia"*

*"Again, as above... we are a fisheries business but NOT a seafood business! There are literally hundreds of small to medium businesses that exist due to the strength of the aquarium harvest fishery and the associated (developing) aquaculture industry. The shutting down of exports reduced our profitability by over 40% and our domestic market was equally affected by lockdowns in various states. (Retail stores buying our products were either shut or restricted trade/traffic)"*

*"(1) We are 99% export - so the collapse in demand in export markets and lack of air freight threatened the foundation of the Australian tuna industry (2) In the end we were able to sell our harvest but at a 30% discount in price. This is \$45m below the previous 5 year average - and that is a big blow to an industry and regional economy."*

*"6 week closure of sales to wholesale purchasers and drop in prices after sales re started. Prices took a long time to recover. Exports stopped due to lack of freight availability and buyer shut downs. Having to fish to obtain freight flights means loss of fishing time. Increase in costs of imports like bait and fishing equipment."*

*"retail part of the business increased in sales over the 30% because everyone was cooking at home and getting take way/ wholesale distribution of prawns were drastically impacted by the lock downs and border closures, the conferences, hotels and seafood all crashed especially in May-June and lower prices/"*

*"1. Market crash in US and China resulted in price decrease of our products of around 35% 2. Reduced ability to move crew, observers, vessels around due to border restrictions. Big increase in costs here"*

*""Price collapse unable to sell product told not to go to work so no income expenses still there and building."*

*"the unknown of what was to come/ we did not know what to order for Easter, basically the inability to plan"*

*"closure to the markets and restaurants in Australia as well as export issues so sales of product declined"*

*"nothing affected the bottom line apart from the inconvenience ie not able to have customers on property/"*

*"decrease economic activity - pearl farm, trying to sell pearls in a poor economic environment is hard"*

*"local tourism was very high, we turned over record figures because people could not travel overseas"*

*"Impact on the supply chain, consumer confidence and tourism markets"*

*"unable to travel to meetings but not too much effect to bottom line"*

*"Higher retail consumption, more seafood consumption retail sales."*

*"lack of transport and decline in markets, drop in market demand/"*

*"Reduced markets with the closure of hospitality venues"*

*"we were shut a lot of the time/ trade was restricted/"*

*"Closure of markets management of aquaculture stock"*

*"Restaurant closures and lack of demand as a result"*

*"everything was closed so we had no one to sell to"*

*"First a serious threat then things back to normal"*

*"freight disruptions and the market was disrupted"*

*"lack of turnover - no turnover means no business"*

*"No impact on the limit scale we are working with"*

*"closure of restaurant/ now prices have improved"*

*"Closure of markets both overseas and domestic."*

*"less market, more competitive, reduced sales"*

*"logistics ie freight had longer lead times.."*

*"export market reliance as we sell crayfish"*

What other non COVID-19 factors have impacted the bottom line for your business over the period January – June this year?

Asked to all Active and Supply respondents.



What they said. . . .

*"The on-going fall-out of POMS in Tasmania and the restriction on trade through biosecurity regulations, has ripped the underlying economic fundamentals out of the hatchery sector in Tassie. We had a domestic market in excess of 250 million seed, and overseas opportunities, with a level of undersupply that brought on new entrants and production capacity. Now the market for oysters is limited to less than 90 million, and business consolidation means much of this will be wrapped up in integrated businesses, which offset the 'real' cost of operating a hatchery against the grow-out side. This has led to continued operating losses across the sector and closure of one business outright, and great uncertainty for others. The outcome might be there are no independent hatcheries to service independent growers, and when this has occurred elsewhere in the world it has led to further centralisation and consolidation of industry as seed supply is then a strategic lever that business can use to manipulate the market. Tasmania might have a duopoly in the not too distant future, and miss the opportunity for species diversification."*

*"SFS in Queensland, taking away business diversity and my access to the resource. FQ putting more red tape. Qld government putting policy through without doing an RIS. No industry has had to sustain so much impost and unjustified treatment..."*

*"Continuity of supply of Australian seafood is one of the biggest challenges that we face. It a bit chaotic a lot of time, can't access Australian products consistently."*

*"the whole industry needs more qualified people ie filleters and people with skills and knowledge , we do not have access to enough skilled people/"*

*"prices are down on the export market but this has been offset by our production volume/ if china issues escalate it could be a real problem/"*

*"Nothing apart from the never ending government department red tape train. That's just a continuing thing that just gets worse year after year"*

*"Probably covid related but change in marketing practices to 100% web based and video streaming made client contacts initially more difficult."*

*"The ability to have face to face meetings, rather than endless zoom meetings-"*

*"Trade issues. China. Resource share with other stakeholders, recreational."*

*"crayfish supply to china, resulting on dumping the product within Australia"*

*"International trade war and/or deterioration of diplomatic relationship"*

*"The extended drought has hugely impacted access to the fish we use."*

*"Conservation groups who have no idea about the fishing Industry"*

*"people do not seem to be out and about or spending because of uncertainty especially in the area of middle to high end products"*

*"lack of ability to fly internationally completely changed the base of what our business was going to do in these 12 months"*

*"Ongoing political troubles with China. This is likely to affect our exports for many years to come. We need to diversify."*

*"access to unemployed people had increased payments and therefore did not want to work / staffing issues have been ongoing"*

*"bushfires in NSW affected the oyster growers that we access, reduced output in that time because they couldn't move stock"*

*"Rain, Rain and More rain, filled up farm dams , lakes and rivers, boosted sales of fishing bait and farm dam stocking"*

*"pricing on crayfish has been up and down - imports/exports to China with getting feed, the holds on crayfish pallets"*

*"Delays to research projects, been difficult to contact/communicate with people due to no face-to-face meetings"*

*"the government assistance helped financially in the first three months until other work started to happen /"*

*"Reduced productivity due to increased mortality and reduced growth rates, origin unknown."*

*"lack of markets. Lack of support from agencies involved in the management of the fishery"*

*"climate is changing so we need to be more robust in our flexibility of farm practices"*

*"not really we don't have commercial production as yet, we are still ramping up."*

*"government red tape, time taken for decision making. cash flow."*

*"bushfires prevented fish coming across from Melbourne to Perth"*

*"Visitors from interstate not being able to access our oysters"*

Between the period January - June 2020, what has been the impact of COVID-19 on the employment aspects of your seafood business?

Asked to all Active and Supply Chain respondents.

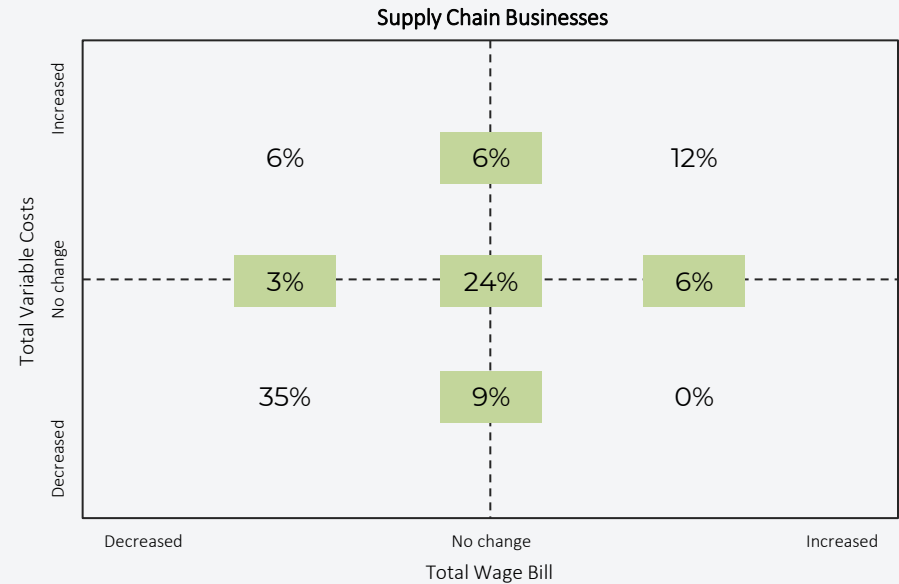
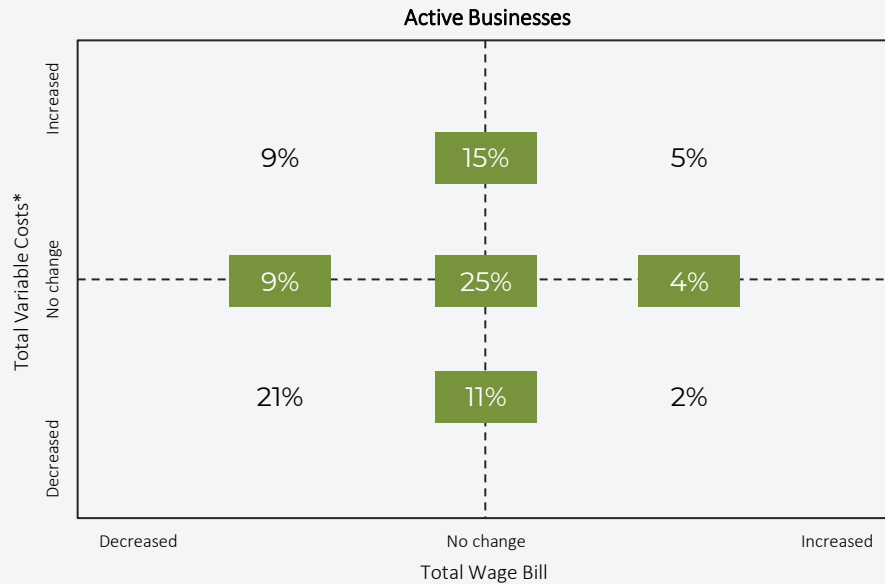
	Active Businesses (n = 151)			Supply Chain Businesses (n = 34)		
	% increased	% no change	% decreased	% increased	% no change	% decreased
Number of people employed (FT or PT)	3%	74%	23%	15%	44%	41%
Number of casual staff or contractors	7%	64%	30%	18%	41%	41%
Number of total working hours by people employed in your business	16%	48%	36%	24%	21%	56%
Total wage bill (including any JobKeeper payments)	11%	51%	38%	18%	38%	44%

Over the period January - June 2020, what has been the impact of COVID-19 on your variable business costs?

Asked to all Active and Supply Chain respondents.

	Active Businesses (n = 151)			Supply Chain Businesses (n = 34)		
	% increased	% no change	% decreased	% increased	% no change	% decreased
Fuel cost	9%	53%	38%	-	-	-
Bait/feed cost	9%	79%	12%	-	-	-
Freight costs	36%	48%	16%	-	-	-
All other variable costs (excluding wages)	14%	61%	25%	-	-	-
Total variable costs (excluding wages)	-	-	-	24%	32%	44%

## COVID Impact on Wage Bill and Variable Costs



The above schematics provide a mapping of impacts of COVID-19 on the total wage bill and total variable costs (as constructed).

The results may not necessarily add to 100% given that some respondents did not complete responses to all questions.

\* A constructed variable was created using results from the itemised costs to create a hypothetical total variable cost.



Over the period January - June 2020, what has been the impact of COVID-19 on the volumes you sold into different channels?

Asked to all Active and Supply Chain respondents.

	Active Businesses (n varies by channel)			Supply Chain Businesses (n varies by channel)		
	% increased	% no change	% decreased	% increased	% no change	% decreased
Direct sales (Active n = 106, Supply n = 23*)	19%	37%	44%	35%	17%	48%
Wholesale sales (Active n = 121, Supply n = 24*)	9%	33%	58%	17%	8%	75%
Retail outlet sales (including online) (Active n = 90, Supply n = 23*)	26%	43%	31%	70%	9%	22%
Food service sales (Active n = 79, Supply n = 22*)	4%	47%	49%	14%	18%	68%
Export sales (Active n = 91, Supply n = 15*)	7%	42%	52%	0%	20%	80%
Total sales volumes (Active n = 151, Supply n = 34)	13%	25%	62%	27%	9%	64%

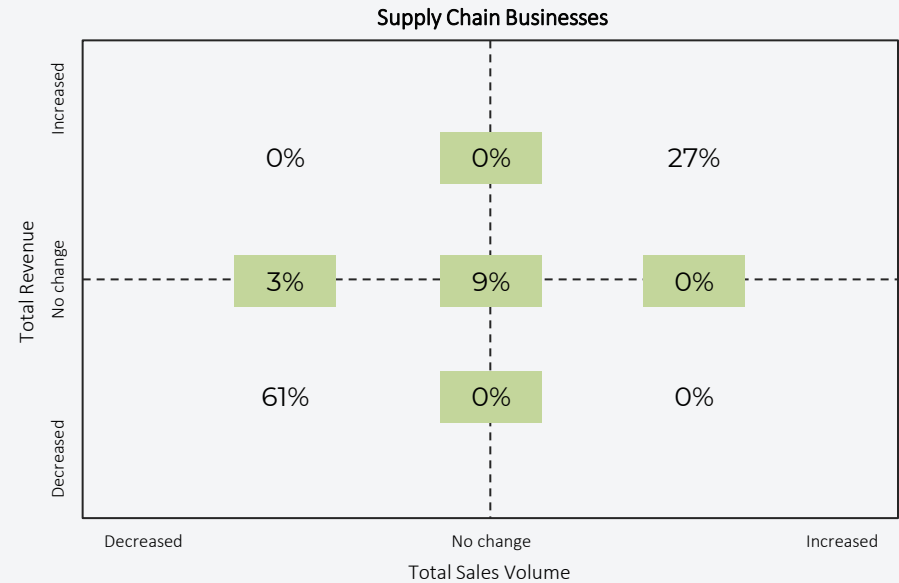
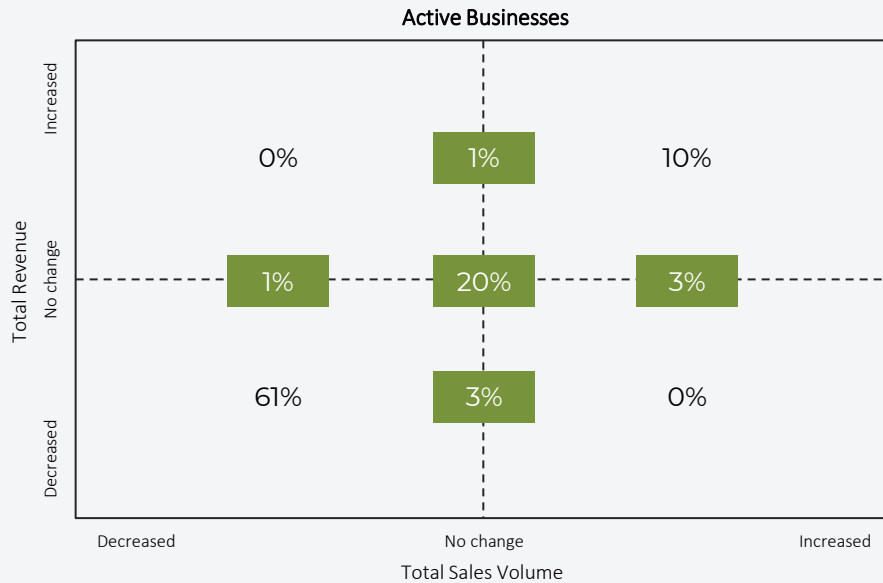
Over the period January - June 2020, what has been the impact of COVID-19 on your business revenue from the volumes sold into different channels?

Asked to all Active and Supply Chain respondents.

	Active Businesses (n varies by channel)			Supply Chain Businesses (n varies by channel)		
	% increased	% no change	% decreased	% increased	% no change	% decreased
Direct sales revenue (Active n = 106, Supply n = 23*)	16%	36%	48%	39%	13%	48%
Wholesale revenue (Active n = 121, Supply n = 24*)	12%	26%	61%	17%	8%	75%
Retail outlet revenue (including online) (Active n = 90, Supply n = 23*)	21%	46%	33%	65%	9%	26%
Food service revenue (Active n = 79, Supply n = 22*)	4%	47%	49%	18%	14%	68%
Export revenue (Active n = 91, Supply n = 15*)	3%	41%	56%	0%	20%	80%
Total revenue (Active n = 151, Supply n = 34)	11%	28%	61%	26%	15%	59%

\* Small sample size (n < 30). Results are indicative only.

## COVID Impact on Sales Volume and Revenue



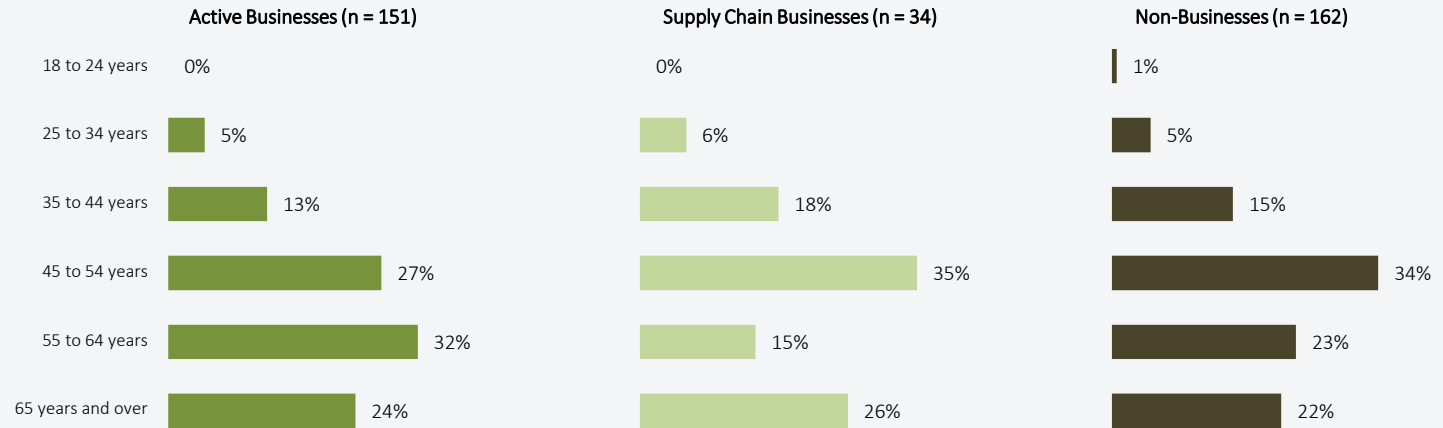
The above schematics provide a mapping of impacts of COVID-19 on the total sales volumes and total revenue (as reported).

The results may not necessarily add to 100% given that some respondents did not complete responses to all questions.

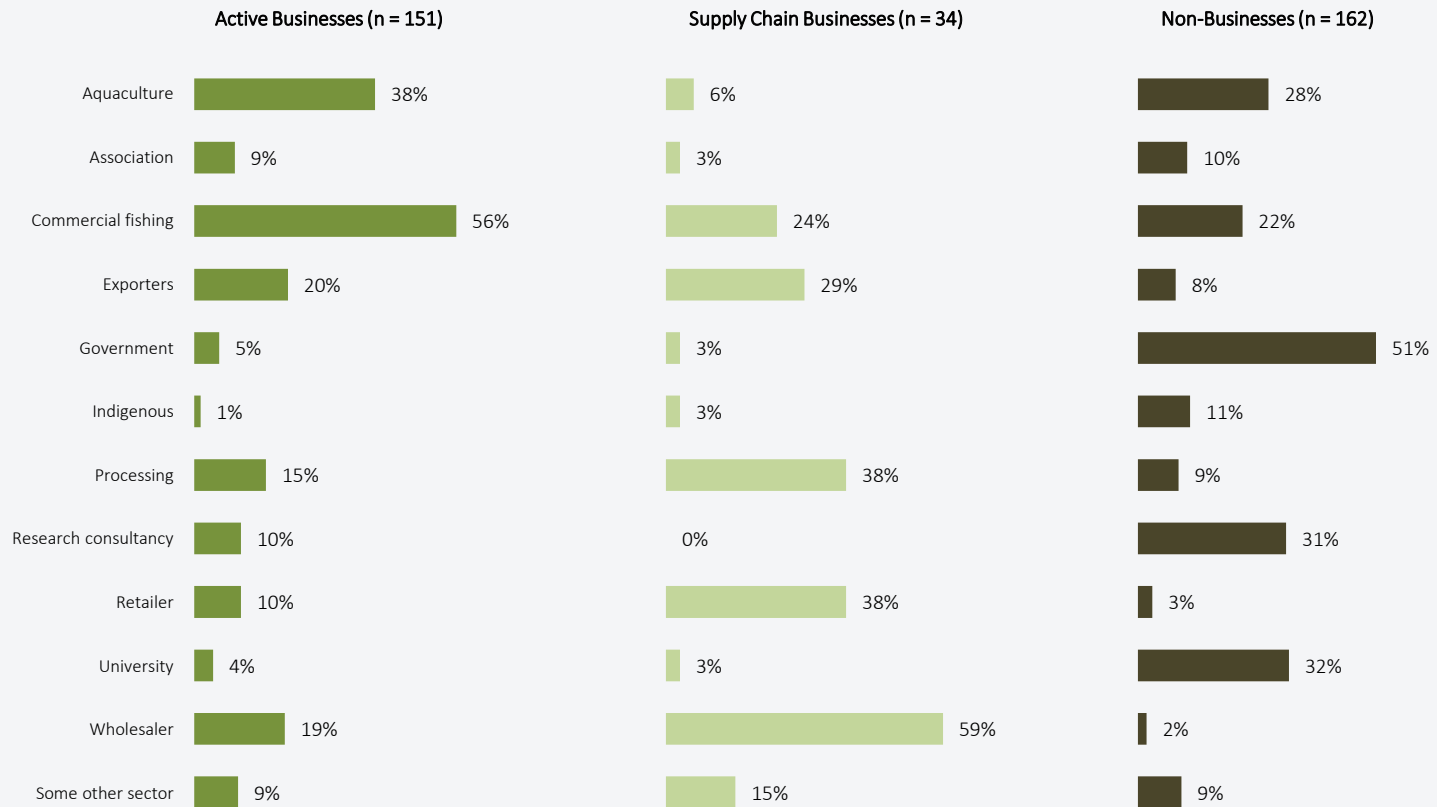


## Attachments

Which of the following age groups do you belong to?  
Asked to all respondents.

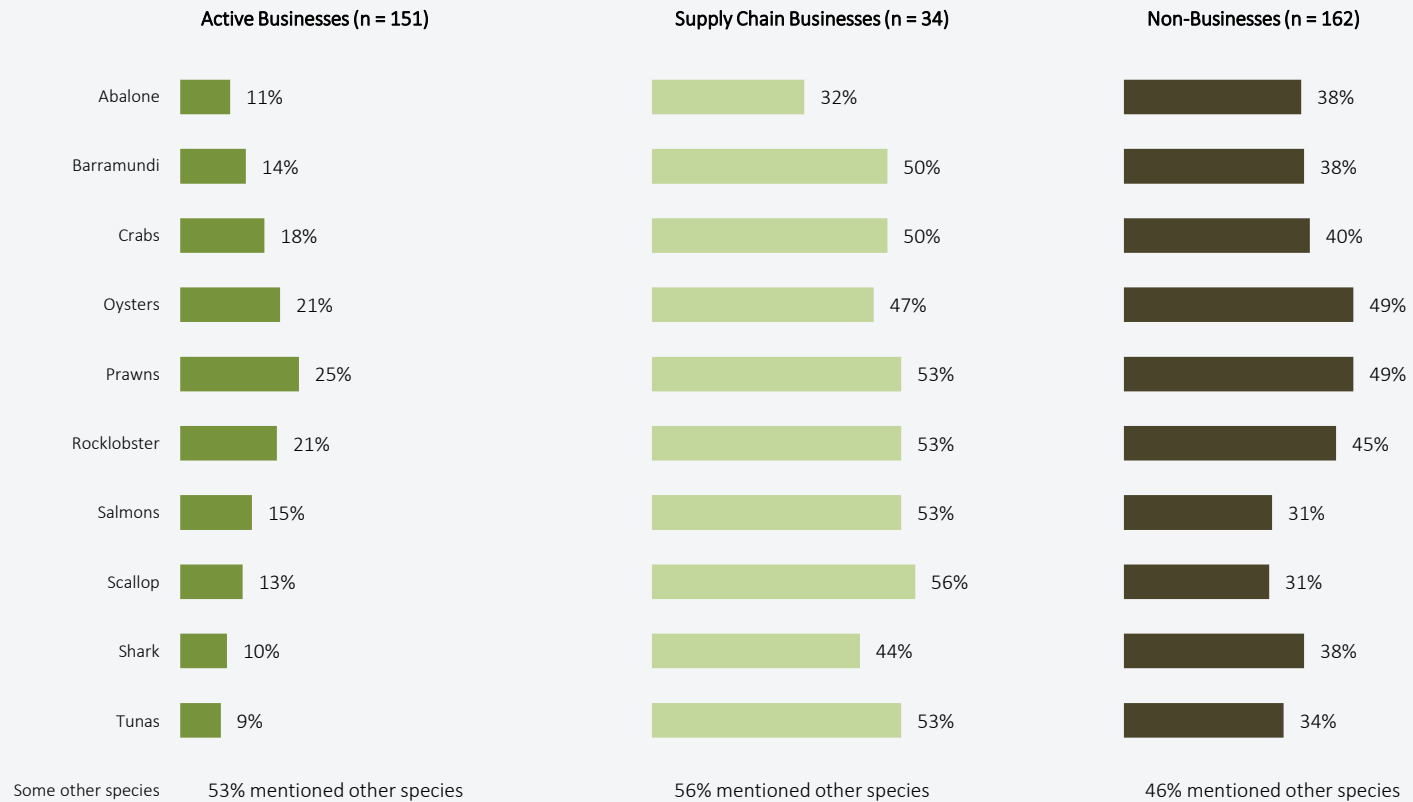


Which of the following sectors of the seafood industry does your seafood business operate in?  
 Asked to all respondents.



# Respondent profiles

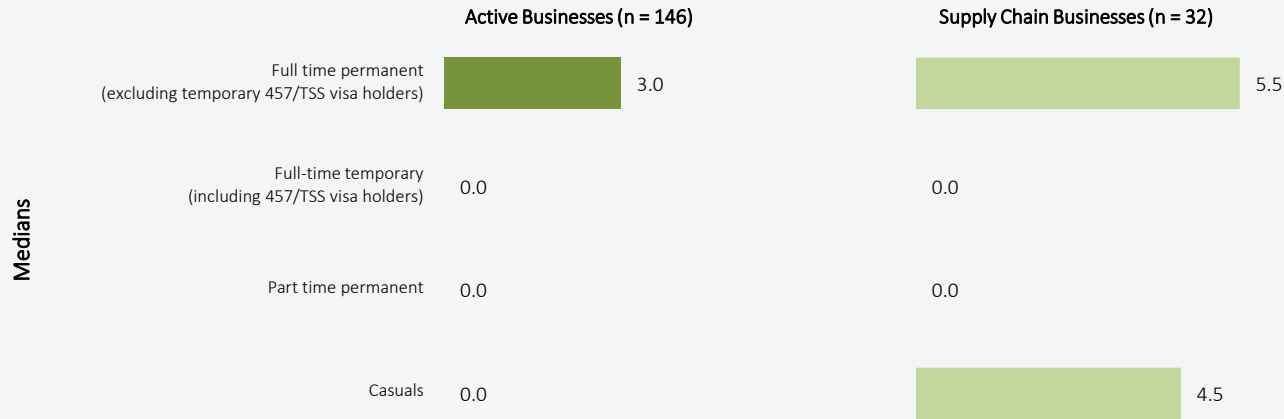
Which of the following species does your seafood business operate in?  
 Asked to all respondents.



# Respondent profiles

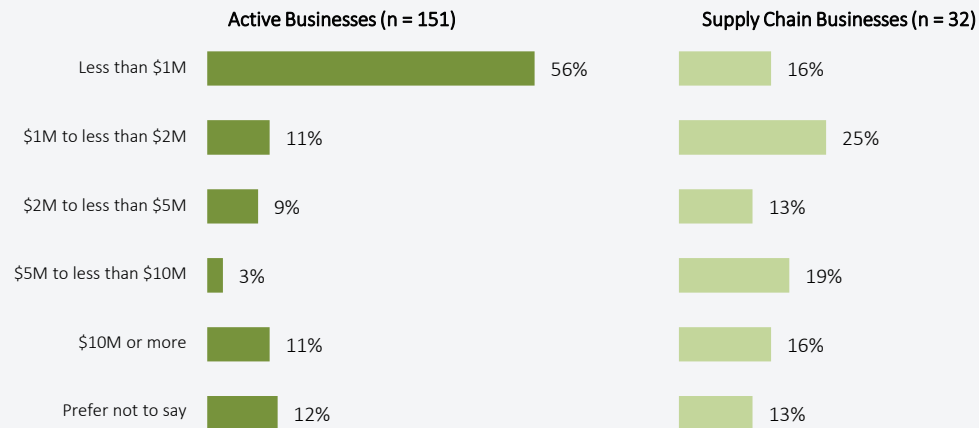
On the 1st JANUARY 2020, how many people were employed in your business? Include yourself and family.

Asked to all Active and Supply Chain respondents.



What was your total revenue in the last financial year, ending June 30, 2020? Please select from the following revenue ranges – best estimate

Asked to all Active and Supply Chain respondents.



Research design	<p>The 2020 FRDC Stakeholder Research was designed to obtain feedback from an agreed set of industry stakeholders. The feedback was customised in the 2020 research to align with other requirements to estimate the economic impact of COVID on the industry. In addition, there was a particular focus on receiving specific feedback on the FRDC website which is about to commence a restructure. This information will be valuable in helping design and shape the new website, an important interface and resources for the industry.</p>
Target audiences	<p>There were three identified target audiences for this research:</p> <ol style="list-style-type: none"><li>1. Active seafood businesses – Those who are working in the sector of “Aquaculture” or “Commercial Fishing”.</li><li>2. Supply chain businesses - Those who are not in an active business (as defined above) and are working in the sector of “Exporters”, “Processing”, “Retailer” or “Wholesaler”.</li><li>3. Non-business stakeholders - Those who are not in an active or supply chain business (as defined above) and are working in the sector of “Association”, “Government”, “Indigenous”, “Research Consultancy” or “University”.</li></ol>
Methodology	<p>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 industry stakeholders. The email invited stakeholders to completed the survey online. This process was then supplemented after 2 weeks with a computer assisted telephone interview (CATI) interview among active seafood businesses and supply chain businesses. The supplementary process was aimed to ‘top up’ the number of interviews in these key audience groups.</p>
Questionnaire	<p>The 2020 FRDC Stakeholder Research involved a 22-minute questionnaire. This measured, amongst other things:</p> <ul style="list-style-type: none"><li>o Industry sentiment</li><li>o Impact of and confidence around COVID</li><li>o Feedback on FRDC strategic priorities</li><li>o Details on how stakeholders source information</li><li>o Details on how stakeholders use FRDC information, resources and tools</li><li>o Experiences with the FRDC website</li><li>o Uptake of information, activities and conferences</li><li>o Satisfaction with FRDC</li><li>o COVID economic impacts</li></ul>
Sample and Response	<p>A sample list of industry stakeholders for this research was provided by FRDC. In total, n = 347 interviewers were completed with industry stakeholders. This included:</p> <p>n = 151 among active seafood businesses n = 34 among supply chain businesses n = 162 among non-business stakeholders</p>
Timing	<p>The data collection for the 2020 FRDC Stakeholder Research was undertaken between the 10<sup>th</sup> November 2020 to the 9<sup>th</sup> December 2020.</p>





## 2020 FRDC Stakeholder Research December 2020

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

For more information, please contact Michael Sparks at Intuitive Solutions:



Phone: (03) 9077 8321

Email: [msparks@intuitivesolutions.com.au](mailto:msparks@intuitivesolutions.com.au)



Or contact Peter Horvat at FRDC

Phone: (02) 6122 2113

Email: [peter.horvat@fredc.com.au](mailto:peter.horvat@fredc.com.au)

Intuitive Solutions is an independent market research supplier and member of the Australian Market & Social Research Society (AMSRS). This survey was conducted under the AMSRS code of conduct.

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