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Prepared for:



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

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

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

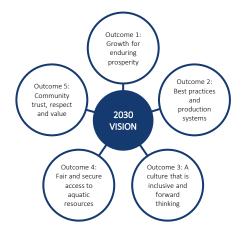
- 1. Growth for enduring prosperity;
- 2. Best practices and production systems;
- A culture that is inclusive and forward thinking a community of fishing and aquaculture that is cooperative, diverse and well equipped to enable growth and adaptability in a complex and uncertain world;
- 4. Fair and secure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

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

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

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

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



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

✓ FRDC's organisational partners

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

✓ FRDC's research community

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

✓ Fishing and Aquaculture

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

✓ The Australian community

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

These first three of these audiences are the focus of the FRDC Stakeholder Survey.

The FRDC stakeholder audience map

Stakeholder Audience: PARTNERS

- ✓ Federal Government
- ✓ State Governments
- ✓ Fisheries managers
- ✓ National resource managers

Stakeholder Audience: FISHING & AQUACULTURE

- ✓ Aquaculture
- ✓ Commercial wild catch
- ✓ Indigenous
- ✓ Recreational fishers
- ✓ Exporters/importers
- ✓ Processors

Stakeholder Audience: AUSTRALIAN COMMUNITY

- ✓ The Australian community (inclusive of age, gender, geography)
- ✓ Seafood consumers
- ✓ Non-seafood consumers

Stakeholder Audience: RESEARCH COMMUNITY

- ✓ Universities
- ✓ TAFEs
- ✓ Government fisheries organisations
- ✓ International research organisations
- ✓ Private sector researchers

How often will this research be undertaken?

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

The 2024 survey represents the third survey of stakeholders under the new Strategic Plan.

Where did the audience segments come from?

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

What was the design for the research?

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

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

Who designed the questions that were included in the survey?

Development of the survey questionnaire was a co-design process involving FRDC and Intuitive Solutions.

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

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

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

There is some cross-over in the fishing and aquaculture audience segment respondents.

While in most audience segments respondents were classified into a single segment, for the fishing and aquaculture audience segment there was some cross-over – for example, in a small number of cases commercial fishers reported also being involved in aquaculture (n = 16 self-reported being involved in both commercial wild catch and aquaculture), some indigenous fishers also self-identified as commercial fishers, etc.

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

What is the Wild Catch and Aquaculture cohort?

The Wild Catch and Aquaculture cohort is a subset of the fishing and aquaculture audience segment and includes those who self-identified as being involved in commercial wild catch and/or aquaculture operating businesses.

Were the survey results weighted?

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

In short, only the Wild Catch and Aquaculture cohort was weighted to provide an aggregated result for this cohort. All remaining cohorts were unweighted.

The survey accumulated a significant volume of feedback

Again in 2024, the Stakeholder Survey collected a large volume of feedback from the included stakeholder groups. It was not possible to present every result by every audience segment and sub-group within this report. The results presented in this report are then a selective representation of the main results, predominantly for the larger stakeholder audiences.

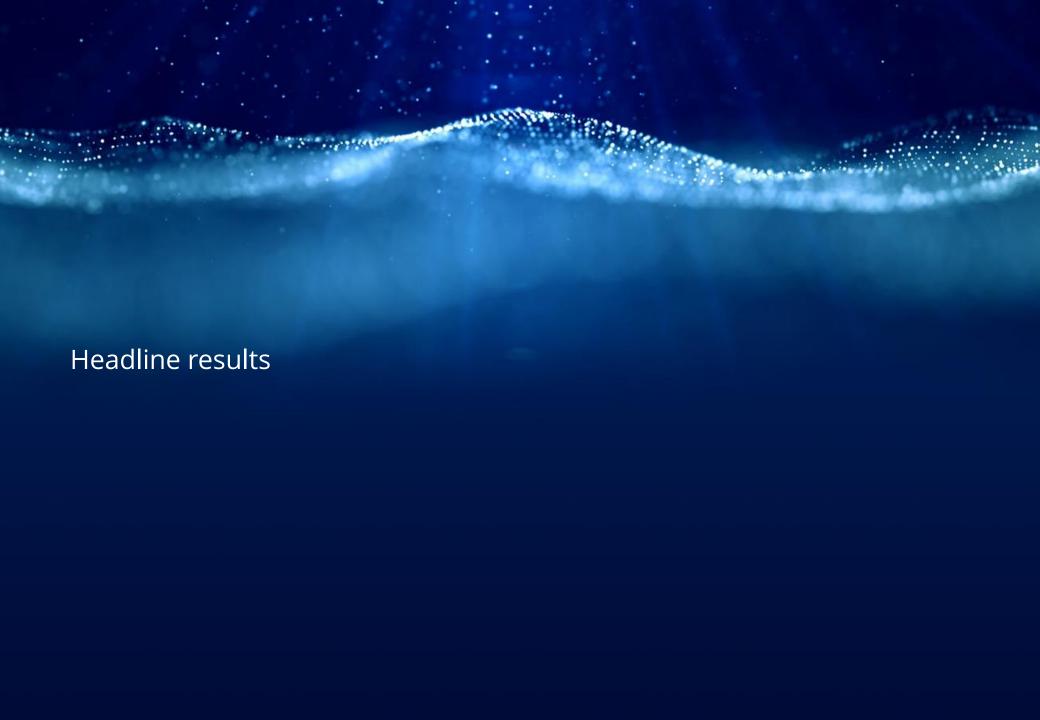
More detailed presentation of results broken down by a range of other sub-groups has been provided to FRDC in a separate analysis workbook.

What results are presented in the report?

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

- Firstly, results from Research Community and Partner stakeholders. Results for these
 two audience segments have not been broken down into any sub-groups but provided at
 an overall level. We would note the results for these two audience segments are
 unweighted.
- O Across this report, results from respondents who self-identified as commercial wild catch and/or aquaculture stakeholders were combined to produce the Wild Catch and Aquaculture cohort. We would note that, based on the advice from FRDC's Human Dimensions coordinating program, the results were weighted 50:50 to produce an overall Wild Catch and Aquaculture result.
- It is important to note that for a range of the key metrics, these detailed results were supplemented with results for the various fishing and aquaculture sub-groups, namely: commercial wild catch, aquaculture, indigenous, supply chain (exporters, importers, processors and/or wholesalers), and recreational fishers. These results are presented unweighted.

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



2024 Stakeholder Survey Results

Indicator (as per Monitoring and Evaluation Framework) Survey measure		Target	Wild Catch and Aquaculture		Partners	Research Community	
KPI1	Stakeholders report that they value FRDC services highly	Proportion of stakeholders that are "satisfied" or "very satisfied" with FRDC services (Q11 - does not include "Don't use" or "Not aware" answers)	70%	2023: 2022:	59% 53% 55%	63% 71% 73%	72% 63% 58%
KPI 2	Stakeholders report that they value FRDC highly	Proportion of stakeholders that are "satisfied" or "very satisfied" with FRDC (Q24)	70%	2023: 2022:	38% 41% 37%	55% 58% 55%	51% 58% 56%
KPI3	Stakeholders report that they value FRDC extension and adoption	Proportion of stakeholders that have gained new knowledge or info from extension and adoption programs, and intend to (or have) made changes in existing practices by adopting outcomes (Q13 – of those who have participated in R&D events in the last 12 months, reported at least one active or passive outcome)	50%	2023: 2022:	89% 91% 86%	96% 94% 96%	88% 83% 79%
KPI 4	Of levy payers who participate in RDC supported extension and adoption programs: -the majority (over half) intend to make or have made changes to existing practices by adopting the outcomes of R&D (2.1 from Guidelines for SFAs KPIs)	Impactful proportion of stakeholders embracing/adopting R&D (Q25 – of those who have participated in R&D events in the last 12 months, reported to have made changes, have plans to, or intend to)	50%	2023: 2022:	69% 70% 66%	75% 77% 83%	69% 72% 76%
KPI 5	Transparent communication to stakeholders (including government) on the impacts and benefits of the RD&E (and marketing) activities (5.3 from Guidelines for SFAs KPIs)	Proportion of stakeholders who "agree" or "strongly agree" that FRDC is transparent in how it communicated the impacts of R&D it has supported (Q23)	No target	2023: 2022:	50% 55% 47%	67% 74% 61%	68% 67% 62%

Κev	metrics
ı.cy	IIIEU IC2

	38%	% satisfied that financial contributions to FRDC are being invested wisely and benefit the fishing and aquaculture sectors and the Aus community
Q	50%	% agree that FRDC is transparent in how it communicates the impacts of R&D it has supported
×\$ ×	41%	Intend to or have made changes to practices because of outcomes from FRDC info, services or R&D projects over the last 3 years
~~	+8	NETT Improvement of FRDC's performance over the past 12 months (scale of -100 to +100)

FRDC mechanisms and outcomes

Interaction with FRDC mechanism	Did this		Reported an outcome *
Used at least one FRDC service	54%		71%
Involved in at least one activity	27%		87%
Participated in at least one R&D event	43%	▶	89%
Interacted with the Extension Officers	29%		74%
Looked at FRDC social media	42%		65%

Industry sentiment



+25

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

What FRDC does directly

96%

9⁄ (\

37%

% who recall at least one FRDC responsibility and role (when prompted with a list)

% who recall all three FRDC responsibilities and roles (when prompted with a list)

Statements about FRDC

		% agree	
	FRDC places a strong emphasis on fishing and aquaculture sustainability	80%	20
(FRDC places a strong emphasis on addressing the environmental issues facing fishing and aquaculture	66%	63
	You/your organisation value(s) the services offered by FRDC	58%	
	FRDC places a strong emphasis on the development of people	56%	
	FRDC places an emphasis on diversity and inclusion for fishing and aquaculture	54%	
	FRDC's engagement with you/your organisation is appropriate	53%	

Sample size: n = 105

Key metrics

	55%	% satisfied that financial contributions to FRDC are being invested wisely and benefit the fishing and aquaculture sectors and the Aus community
Q	67%	% agree that FRDC is transparent in how it communicates the impacts of R&D it has supported
× ×	63%	Intend to or have incorporated any of FRDC's R&D outputs over the last 3 years

~~

+24

NETT Improvement of FRDC's performance over the past 12 months (scale of -100 to +100)

Industry sentiment



+34

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

What FRDC does directly



99%

45%

% who recall at least one FRDC responsibility and role (when prompted with a list)

% who recall all three FRDC responsibilities and roles (when prompted with a list)

FRDC mechanisms and outcomes

Interaction with FRDC mechanism	Did this	 Reported an outcome *
Used at least one FRDC service	75%	 92%
Involved in at least one activity	50%	 88%
Participated in at least one R&D event	66%	 96%
Interacted with the Extension Officers	47%	 88%
Looked at FRDC social media	55%	 78%

Statements about FRDC

	% agree	
FRDC places a strong emphasis on fishing and aquaculture sustainability	86%	23
You/your organisation value(s) the services offered by FRDC	83%	
FRDC places a strong emphasis on addressing the environmental issues facing fishing and aquaculture	72%	63
FRDC's engagement with you/your organisation is appropriate	71%	
FRDC places a strong emphasis on the development of people	70%	
FRDC places an emphasis on diversity and inclusion for fishing and aquaculture	63%	

Sample size: n = 88

Key metrics FRDC mechanisms and outcomes						
16	51%	% satisfied that financial contributions to FRDC are being invested wisely and benefit the fishing and	Interaction with FRDC mechanism	Did this	>	Reported an outcome *
		aquaculture sectors and the Aus community	Used at least one FRDC service	72%		83%
Q	68%	% agree that FRDC is transparent in how it communicates the impacts of R&D it has supported	Involved in at least one activity	42%		86%
		communicates the impacts of hab it has supported	Participated in at least one R&D event	66%		88%
×1 6×	63%	Intend to or have incorporated any of FRDC's R&D outputs over the last 3 years	Interacted with the Extension Officers	43%		79%
101		outputs over the last 3 years	Looked at FRDC social media	49%		84%
,,,,	+11	NETT Improvement of FRDC's performance over the past 12 months (scale of -100 to +100)	Statements about FRDC			
Industry	sentimen	†			% agree	
~		NETT Sentiment of the future of Aus fishing /	You/your organisation va services offered		80%	
44	+42	aquaculture industry over the next 12 months (scale of -100 to +100)	FRDC places a strong em fishing and aquaculture sust		77%	2
			FRDC's engagement with organisation is ap		74%	
What FRI	DC does d	lirectly	FRDC places a strong emphasis on addre environmental issues facing fishing and aq		73%	63
~	100%	% who recall at least one FRDC responsibility and role (when prompted with a list)	FRDC places a strong em the development		70%	
	49%	% who recall all three FRDC responsibilities and roles (when prompted with a list)	FRDC places an emphasis on dive inclusion for fishing and aq		63%	



A summary of some of the key insights from the 2024 FRDC Stakeholder Survey now follow.

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

- 1. Wild Catch and Aquaculture businesses (an equal-weighted mix of stakeholders who self-identified as those involved in commercial wild catch and/or aquaculture operating businesses, but excluding other sub-groups such as indigenous, recreational fishers and supply chain businesses);
- 2. Unweighted results from FRDC Partners; and
- 3. Unweighted results from FRDC's Research Community.

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

Context

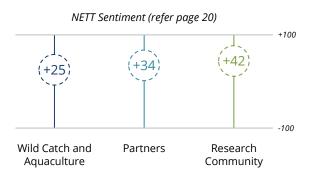
The survey data collection was undertaken across November 2024 a period where the industry was still impacted by changing trade environments, continued high input and processing costs, and a volatile global market. The domestic market continues to be impacted by cost-of-living pressures and high levels of inflation making trading and operating conditions challenging.

Stakeholder's outlook

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

- ✓ More stakeholders indicated they were more positive than negative about the future.
- ✓ NETT sentiment (i.e. % positive % negative) of +25 (Wild Catch and Aquaculture, up 4 points from 2023), +34 (Partners, no change) and +42 (Research Community stakeholders, down 17 points). While the NETT sentiment scores reflect that most stakeholders hold a positive outlook for the immediate future, there are differences within the Fishing and Aquaculture cohort.
- ✓ NETT sentiment was considerably stronger among aquaculture stakeholders (+53) compared to wild catch stakeholders (-6). That is an important context when considering other results in the 2024 survey.

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



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

An ongoing challenge facing most RDCs is in ensuring there is a clear understanding of the role and responsibilities of the RDC. For FRDC, this is particularly amplified because of the wide remit of responsibilities and the varied stakeholder audiences is supports and manages.

The results from the 2024 survey underscore this challenge for FRDC.

For example, among Wild Catch and Aquaculture stakeholders, most (96%) correctly identified at least one of the actual responsibilities, but around four in ten (43%) also identified a responsibility outside of FRDC's remit. Of note is that 30% reported political lobbying was an FRDC role. While some stakeholders may misunderstand FRDC's role, it may well be that the absence of a clearly identified advocate for their industry some stakeholders are assuming FRDC does or should have this responsibility.

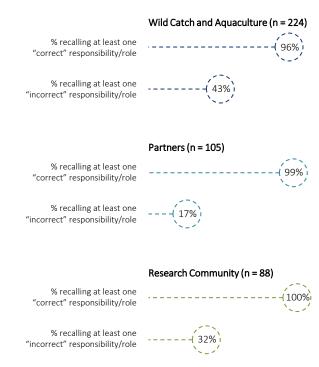
There has been no improvement on these measures over the last 12 months.

While this does not represent a large proportion of this stakeholder cohort, it will likely for these stakeholders create expectations of FRDC that are unlikely to be met. This may contribute to a dampened level of satisfaction of FRDC among these stakeholders.

While the issues of misalignment of responsibilities exists, there remains a challenge to continue efforts to inform and define the actual role and responsibility of FRDC to as many stakeholders as possible. This may be assisted with communications which articulate what FRDC 'does not' do.

This remains a 'work in progress'.

What does FRDC have responsibility for or play a role in? (6 roles provided, refer page 22)



Visibility steady but the positive impact of the EON still evident

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

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

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

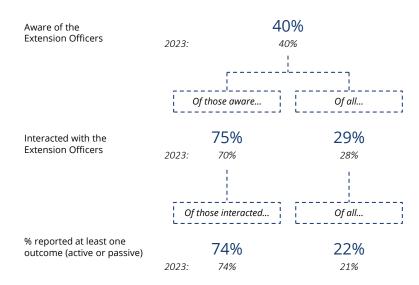
From the feedback, we note that:

- ✓ Awareness of the EON has remained steady (40% reported being aware). The results indicate an initial plateau has been achieved and that some different approaches to creating and sustaining awareness may be required to take this result to the next level.
- ✓ For F&A, results analysis of some subgroups shows that awareness of the EON:
 - Was similar between aquaculture (40%) and wild catch (40%) stakeholders
 - Was largely consistent across the species categories (finfish 42%, crustaceans 44% and molluscs 40%)
 - Was somewhat stronger among larger businesses (stakeholders with a revenue \$10 or more 49% v less than \$500K 30%)
- ✓ The proportion of F&A stakeholders aware of the EON who had an interaction with the EON over the last 12 months increased slightly (75%, up from 70% in 2023).
- ✓ There are signals the interactions are creating a positive impact with 22% reporting some form of impact because of the interactions (up from 21% in 2023).

While awareness of the EON has remained stable, there are some signals that the contact and value of the contact with the EON continue to improve slowly. There continues to be considerable further upside (increase awareness from the current 40% and ramp up the interactions).

A focus over the next 12 months should be on identifying ways of improving the awareness and visibility of the EON across the F&A sector.

Wild Catch and Aquaculture (n = 224)



Satisfaction remains modest for Wild Catch and Aquaculture stakeholders

As shown opposite, the proportion of stakeholders rating very satisfied or satisfied with FRDC's investment in R&D remained strong among Partners (55%, down 3% from 2023) and Research Community stakeholders (51%, down 7%), but lower among Wild Catch and Aquaculture stakeholders (38%, down 3%). Among the F&A cohort, we note that:

- o an increase in those reporting to be very satisfied (14%, up 5 points), with an accompanying fall in those reporting being satisfied (24%, down 8 points);
- o consistent with last year, there is a large proportion (38%) were ambivalent (rating neutral); whilst
- o almost one in four (24%) reported being dissatisfied (15% dissatisfied and 9% very dissatisfied, up 3 points on each).

Among F&A stakeholders, there has been a small softening of satisfaction year-on-year (down 3 points to 38%). On further analysis, we note that satisfaction:

- o was different between aquaculture only stakeholders (44%) and wild catch only stakeholders (31%)
- o was stronger among businesses who reported operating in both wild catch and aquaculture sectors (50%)
- o was largely consistent across the species categories (finfish 34%, crustaceans 36% and molluscs 38%);
- o was stronger among larger businesses (revenue \$10M or more 68% v less than \$500K 25%).

The analysis also shows that year-on-year satisfaction

- o remained largely unchanged among wild catch only stakeholders (31% v 30% in 2023)
- o fell among aquaculture only stakeholders (44% v 49%)
- o was consistent among stakeholders operating in both aquaculture and wild catch sectors (50% v 52%)

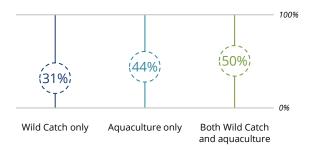
While the decline this year can arguably be attributed to a softening in satisfaction among aquaculture stakeholders, there remains a clear difference between the two broad F&A sectors.

The analysis of the feedback provided continues to illustrate the effectiveness of engagement with FRDC on stakeholder satisfaction. The summary analysis shown opposite indicates a different level of satisfaction where stakeholders engage with the EON and are involved in R&D extension activities. While this is not a causal link, it demonstrates the effect strong engagement can create on stakeholder satisfaction.

There remains 'upside' opportunities for FRDC to continue to strengthen and deepen its engagement across all stakeholder audiences.

% very satisfied + satisfied with FRDC investment (refer page 53)





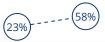
% very satisfied + satisfied with FRDC investment

Wild Catch and Aquaculture (n = 224)

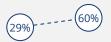
Did not do this

Did this

Participated in at least one R&D event



Interacted with FRDC Extension Officers



Different experiences between Wild Catch and Aquaculture stakeholders

As noted above, there are some clear differences on some measures between wild catch and aquaculture stakeholders. Based on the 2024 survey we note:

- There is a clear difference in sentiment with wild catch stakeholders holding a far less positive outlook for the industry over the next 12 months. This more subdued outlook is likely playing forward into their perceptions of, and experiences with FRDC.
- Wild catch stakeholders hold a more conservative view of FRDC. On the six organisational measures included in the survey, wild catch stakeholders were consistently less likely to report they associate FRDC with these measures. The results indicate wild catch stakeholder currently hold a different view of FRDC.
- o Aquaculture stakeholders reported a stronger level of engagement with FRDC:
 - More likely to have been involved in at least one FRDC sponsored Capability and Capacity Building (C&CB) activity; and
 - More likely to have participated in at least one FRDC R&D extension event.

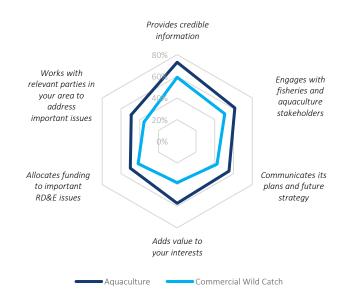
This experience base looks to have translated to more muted levels of satisfaction:

- o Lower satisfaction (with the investments made by FRDC) compared to aquaculture stakeholder; and.
- Lower sat on transparency in communications related to the impact of R&D.

While the differences are not evident across every measure in the survey, the differences between these two stakeholder cohorts warrant further reflection. There may well be differences in the focus of FRDC's activities, different needs and expectations among wild catch stakeholders or other structural factors which contribute to the differences reported above.

Closing the gap in stakeholder experiences should translate to an improvement in the overall F&A results and measures

% satisfied that FRDC does the following



	Aquaculture (n = 96)	Commercial Wild Catch (n = 144)
Nett Sentiment	+53	-6
% involved in at least one FRDC sponsored C&CB activity	28%	23%
% participated in at least one FRDC R&D extension event	47%	41%
Satisfaction with FRDC investment	45%	33%
Satisfaction with transparency	51%	47%

Signals that the investments, resources and communications are creating an impact for industry

The 2024 survey attempted to capture (at a very high level) signals that the FRDC investments in R&D, resources, extension and communications may be contributing to creating an environment where change to operating practices has been undertaken or is being considered by F&A stakeholders.

From the 2024 results, we see:

- Just over four in ten (41%, down 1 point from 2023) reported having made a change or intending to make a change as a result of outcomes from any of the FRDC information, services or R&D projects.
- o This result is amplified when looking at those stakeholders who have participated in R&D events in the last 12 months (69%, also down 1 point from 2023). This confirms the relationship noted above between engagement and stronger outcomes.

While some caution should be exercised before overclaiming the impact being achieved, the results provide some encouraging signals that the FRDC tools, resources, services and R&D are making a contribution among at least some F&A businesses.

The detailed results from the 2024 FRDC Stakeholder Survey now follow.

Wild Catch and Aquaculture (n = 224)

Of all respondents:



41% 2023: 42%

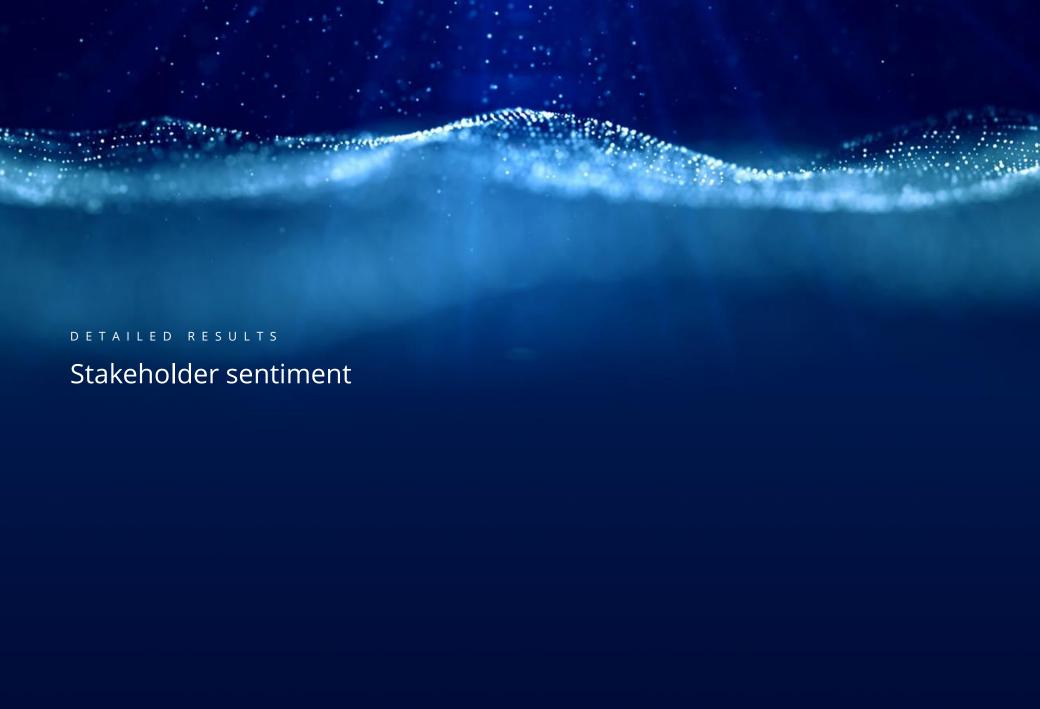
Intend to or have made changes in the last 3 years because of outcomes from FRDC info, services or R&D projects

Of those participated in R&D events in the last 12 months:

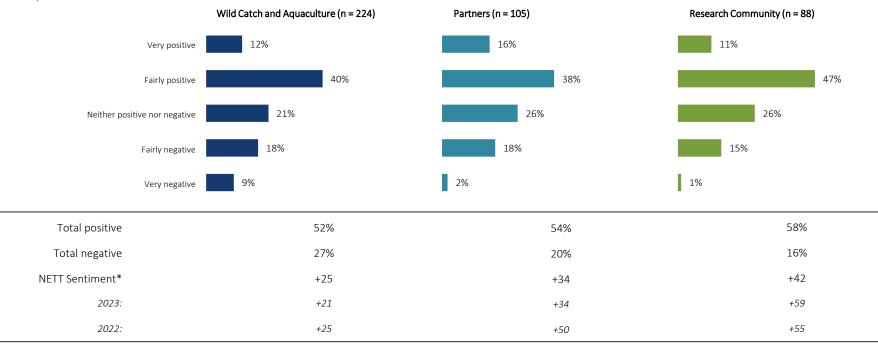


69%

Intend to or have made changes in the last 3 years because of outcomes from FRDC info, services or R&D projects



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



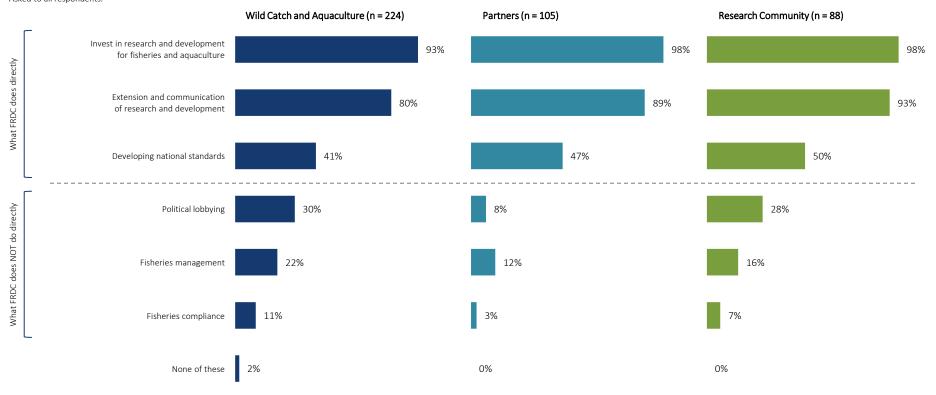
Results across Fishing and Aquaculture sub-groups:

The table below provides results for the five different Fishing and Aquaculture industry sub-groups. Note the results above (Wild Catch and Aquaculture) are a weighted subset of the Fishing and Aquaculture audience segment (those who self-identify as being involved in commercial wild catch and/or aquaculture operating businesses), while the results in the table below are unweighted. Please also note that a small number of respondents reported participating in more than one of these sub-groups, so there is some limited cross-over between a small number of survey respondents.

Sub-groups of Fishing & Aquaculture	Aquaculture (n = 96)	Commercial Wild Catch (n = 144)	Supply Chain (n = 68)	Indigenous (n = 20)	Recreational Fishers (n = 64)
Total positive	64%	39%	40%	55%	53%
Total negative	10%	44%	35%	10%	28%
NETT Sentiment	+53	-6	+4	+45	+25



Based on what you understand, which of the following does FRDC do directly? Please select all that apply. Asked to all respondents.



Based on what you understand, which of the following does FRDC do directly? Please select all that apply. Asked to all respondents.

Wild Catch and Aquaculture (n = 224)		Partners (n = 105)	Research Community (n = 88)	
Correct responsibilities / roles of FRDC recalled				
None recalled	4%	1%	0%	
One recalled	14%	10%	8%	
Two recalled	45%	45%	43%	
All three recalled	37%	45%	49%	
% recalling at least one "correct" responsibility/role	96%	99%	100%	
2023:	96%	98%	97%	
2022:*	93%	98%	100%	
% recalling at least one "incorrect" responsibility/role	43%	17%	32%	
2023:	36%	27%	36%	
2022:*	61%	52%	51%	
% recalling all three "correct" and zero "incorrect" responsibilities/roles	15%	34%	32%	
2023:	17%	24%	20%	
2022:*	5%	11%	5%	

^{*} In 2022, four "correct" and four "incorrect" responsibilities / roles were presented, compared to three each in 2023 and 2024.



Stakeholder experience with: FRDC Co-ordination Programs and services, activities & extension

Awareness and/or use of FRDC Co-ordination Programs or services

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



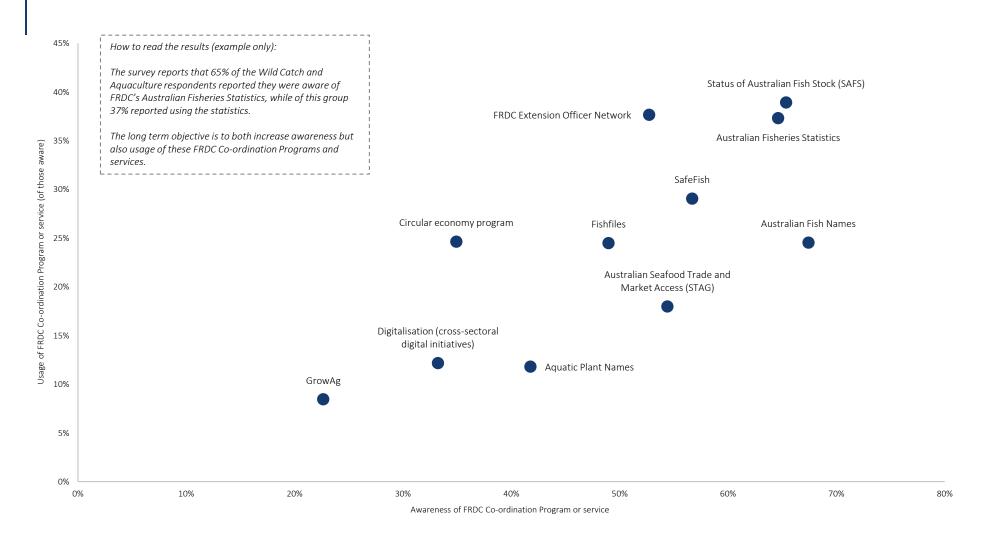
Awareness and/or use of FRDC Co-ordination Programs or services

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

'	Wild Catch and Aquaculture (n	= 224)	Partners (n = 105)		Research Community (n = 88)	
None aware	9%		3%		1%	
One to three aware	21%		16%		9%	
Four to six aware	28%		30%	30%		
Seven to eleven aware	33%		41%	41%		
All twelve aware	9%		10%	10%		
Average # of FRDC programs / services aware of	5.4 out of 11		6.4 out of 11	6.8 out of 11		
2023:	5.5 out of 12		6.6 out of 12		6.3 out of 12	
2022:	5.5 out of 12		6.8 out of 12		7.1 out of 12	
Sub-groups of Fishing & Aquaculture	Aquaculture (n = 96)	Commercial Wild Catch (n = 144)	Supply Chain (n = 68)	Indigenous (n = 20)	Recreational Fishers (n = 64)	
Average # of FRDC programs / services aware of	5.4 out of 11	5.5 out of 11	6.2 out of 11	4.7 out of 11	5.3 out of 11	

Mapping awareness and use of FRDC Co-ordination Programs and services

Wild Catch and Aquaculture (n = 224) mapping of awareness of FRDC Co-ordination Programs and services (X-Axis) against the usage of FRDC Co-ordination Programs and services <u>among those aware</u> (Y-Axis).

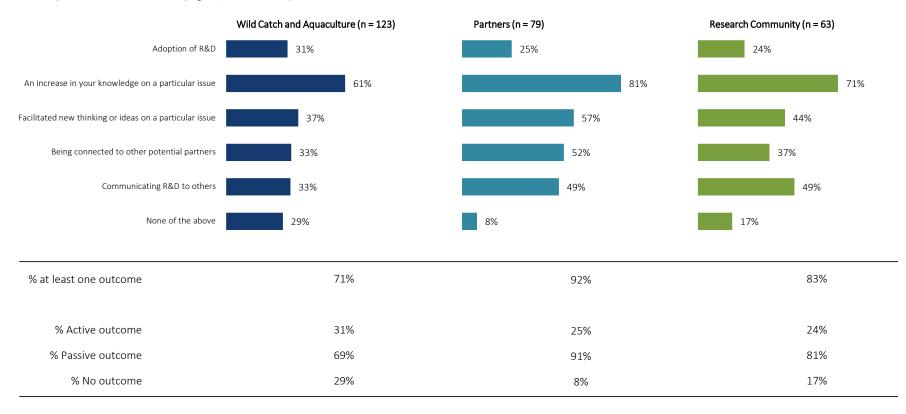


Reported outcomes from using FRDC Co-ordination Programs or services

The following question is asked to those who have used FRDC Co-ordination Programs or services over the past 12 months:

54% 75% **72%**

Did your utilisation of these FRDC Co-ordination Programs or services lead to any of the following outcomes? Please select all that apply. Asked to all respondents who have utilised FRDC programs/services over the past 12 months.

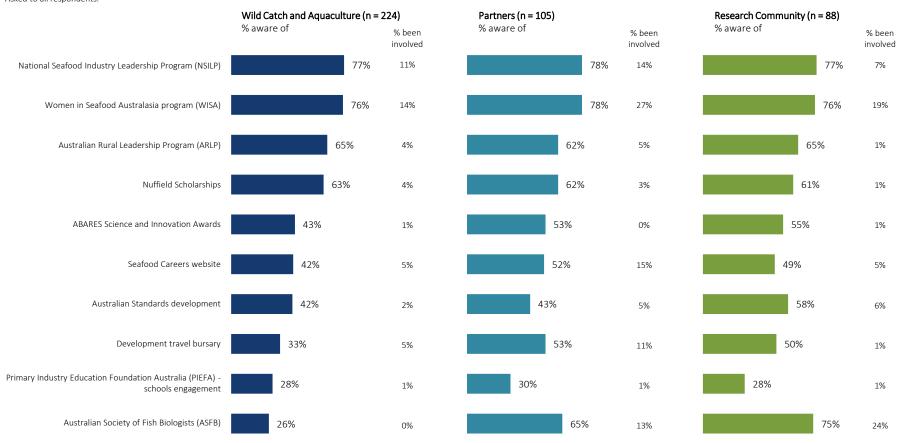


Usage and outcomes from FRDC Co-ordination Programs and services

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

	Wild Catch and Aquaculture (n = 224)		(n = 224)	Partners (n = 105)		Research Community (n = 88)	
Used at least one FRDC program/service	2023: 2022:	54% 46% 50%		75% 71% 78%		72% 66% 72%	
Of those who used							
% reported at least one outcome (active or passive)	2023: 2022:	71% 88% 74%		92% 97% 89%		83% 94% 85%	
Of all respondents							
Used at least one FRDC program/service AND reported at least one outcome (active or passive)	2023: 2022:	38% 40% 37%		70% 69% 69%		59% 63% 61%	
Sub-groups of Fishing & Aquaculture		aculture ı = 96)	Commercial Wild Catch (n = 144)	Supply Chain (n = 68)	Indigenous (n = 20)	Recreational Fishers (n = 64)	
Used at least one FRDC program/service		49%	58%	65%	50%	53%	
Of those who used % reported at least one outcome (active or passive)		77%	67%	73%	90%	76%	
Of all respondents Used at least one FRDC program/service AND reported at least one outcome (active or passive)		38%	39%	47%	45%	41%	

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



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

	Wild Catch and Aquaculture (n = 224)	Partners (n = 105)	Research Community (n = 88)
Average # of FRDC activities aware of	5.0 out of 10	5.8 out of 10	5.9 out of 10
2023:	4.4 out of 9	5.1 out of 9	5.0 out of 9
2022:	3.5 out of 8	4.8 out of 8	4.5 out of 8
None aware	9%	6%	3%
One to two aware	11%	12%	10%
Three to four aware	28%	16%	18%
Five to nine aware	44%	50%	52%
All ten aware	9%	15%	16%

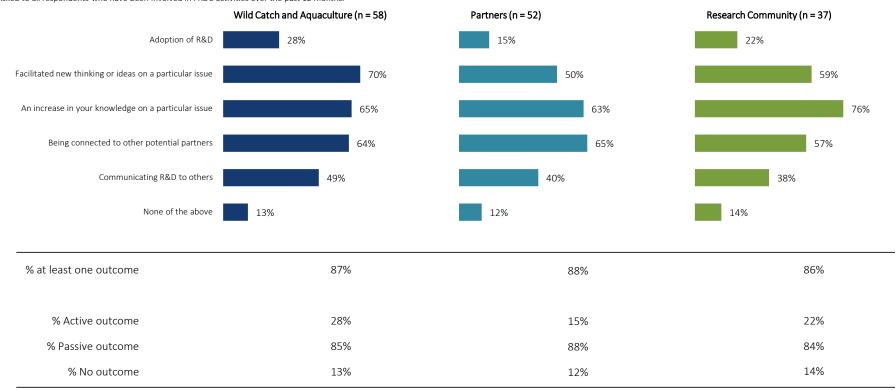
	Wild Catch and Aquaculture (n = 224)	Partners (n = 105)	Research Community (n = 88)
Average # of FRDC activities involved in	0.5 out of 10	0.9 out of 10	0.7 out of 10
2023:	0.4 out of 9	0.6 out of 9	0.6 out of 9
2022:	0.5 out of 8	0.7 out of 8	0.4 out of 8
No involvement	73%	50%	58%
One involved in	15%	27%	26%
Two involved in	7%	10%	10%
Three or more involved in	5%	12%	6%

Reported outcomes from being involved in FRDC C&CB activities

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

27% 50% 42%

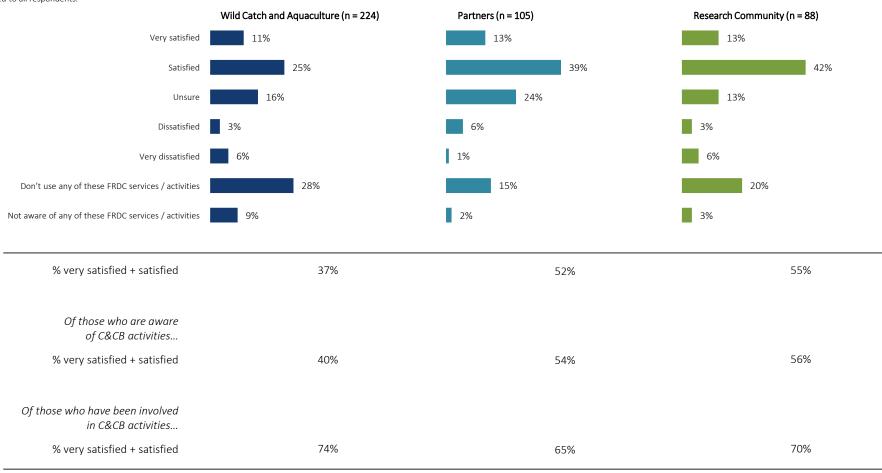
Did your involvement in these Capability and Capacity Building activities lead to any of the following outcomes? Please select all that apply. Asked to all respondents who have been involved in FRDC activities over the past 12 months.



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

	Wild Catch and Aquaculture (n = 224)		Partners (n = 105)	1	Research Community (n = 88)	
Involved in at least one activity	2023: 2022:	27% 27% 27%		50% 42% 46%		42% 33% 30%
Of those who were involved						
% reported at least one outcome (active or passive)	2023: 2022:	87% 84% 72%		88% 87% 93%		86% 92% 84%
Of all respondents						
Involved in at least one activity AND reported at least one outcome (active or passive)	2023: 2022:	23% 23% 20%		44% 36% 43%		36% 30% 26%
Sub-groups of Fishing & Aquaculture		aculture n = 96)	Commercial Wild Catch (n = 144)	Supply Chain (n = 68)	Indigenous (n = 20)	Recreational Fishers (n = 64)
Involved in at least one activity		28%	23%	25%	35%	11%
Of those who were involved % reported at least one outcome (active or passive)	93%		82%	88%	100%	71%
Of all respondents Involved in at least one activity AND reported at least one outcome (active or passive)		26%	19%	22%	35%	8%

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

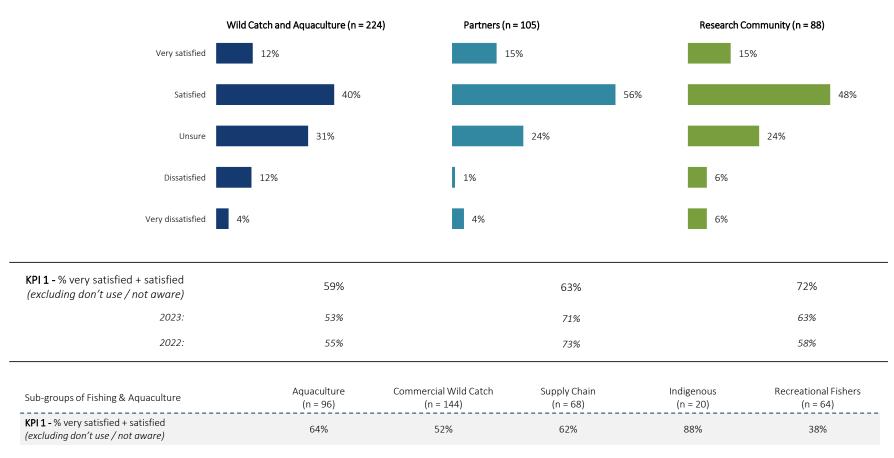


Satisfaction with FRDC C&CB activities



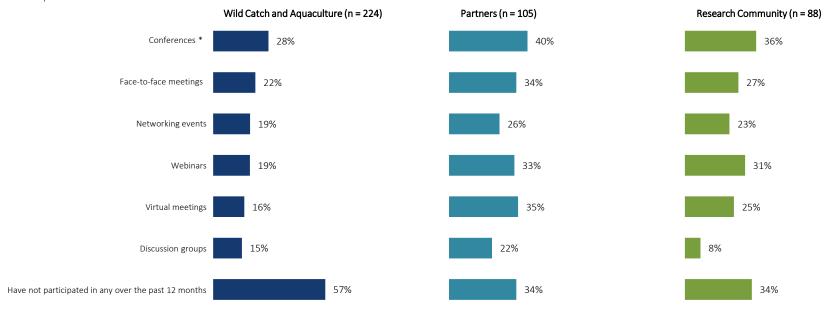
How satisfied are you with the services and Capability and Capacity Building activities FRDC provides to you? Would you say you are...? Asked to all respondents.

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



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

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

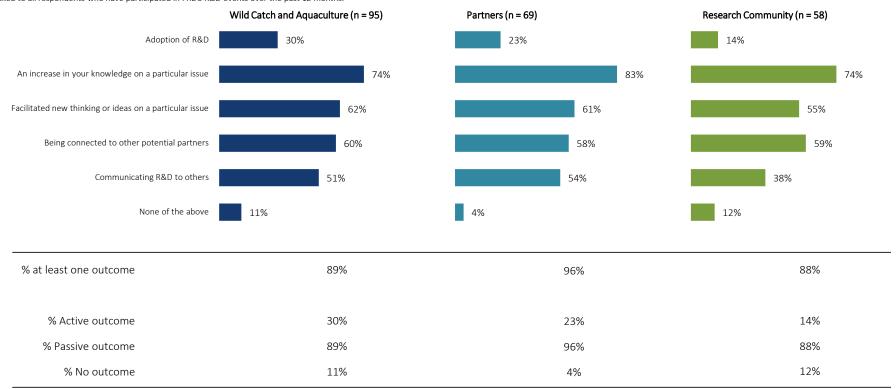


Reported outcomes from participating in FRDC R&D extension events

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

43% 66%

Did your participation in these R&D events lead to any of the following outcomes? Please select all that apply. Asked to all respondents who have participated in FRDC R&D events over the past 12 months.

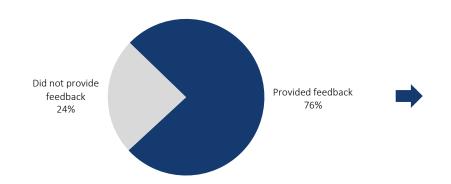




Participation and outcomes from FRDC R&D extension events over the past 12 months Asked to all respondents.

	Wild Catch a	and Aquaculture	e (n = 224)	Partners (n = 105)		Research Community (n = 88)
Participated in at least one R&D event	2023: 2022:	43% 38% 33%		66% 67% 51%		66% 57% 40%
Of those who participated						
KPI 3 - % reported at least one outcome (active or passive)	2023: 2022:	89% 91% 86%		96% 94% 96%		88% 83% 79%
Of all respondents						
Participated in at least one R&D event AND reported at least one outcome (active or passive)	2023: 2022:	38% 35% 28%		63% 63% 49%		58% 48% 32%
Sub-groups of Fishing & Aquaculture		uaculture (n = 96)	Commercial Wild Catch (n = 144)	Supply Chain (n = 68)	Indigenous (n = 20)	Recreational Fishers (n = 64)
Participated in at least one R&D event		47%	41%	46%	60%	20%
Of those who participated KPI 3 - % reported at least one outcome (active or passive)		93%	83%	84%	100%	92%
Of all respondents Participated in at least one R&D event AND reported at least one outcome (active or passive)		44%	34%	38%	60%	19%

What would need to change for you to take up an opportunity to participate in an R&D event over the next 12 months? Asked to all respondents who have **not** participated in FRDC R&D events over the past 12 months.



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

Feedback grouped into several 'themes'

- 19% Relevant subjects
- 15% Personal changes (my time/availability, my interest, etc.)
- 11% More contact about opportunities (invite me, follow-up emails, etc.)
- 8% More opportunities closer to me (more local, regional, etc.)
- 8% Nothing / N/A
- 7% More awareness of the opportunities
- 5% Funding/Support to attend the opportunities
- 3% No value in attending
- 3% More online opportunities

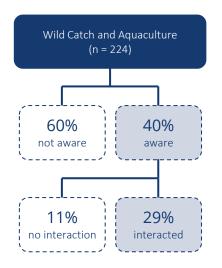


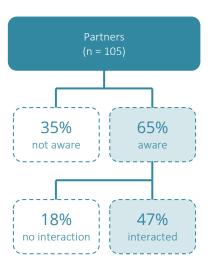
FRDC's Extension Officer Network (EON) was established over two years ago as a three-year trial program.

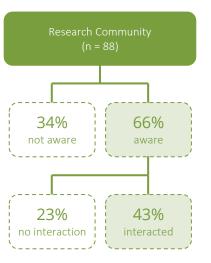
In June 2024, the FRDC Board approved for the EON to continue and for it to be embedded within the organisation. There is an Extension Officer to support each jurisdiction in Australia and their role is to engage with stakeholders and learn more about their needs, connect stakeholders with RD&E outputs/activities, while making connections where needs, priorities, stakeholders and activities, overlap.

The 2024 FRDC Stakeholder Survey provides another measure of stakeholder's awareness of and engagement with these Extension Officers.

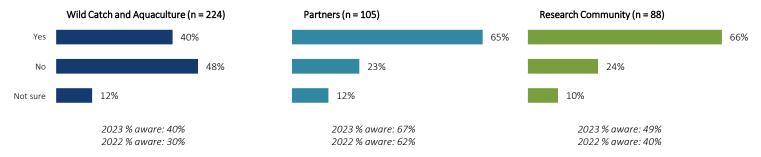
Awareness and interactions with FRDC Extension Officers



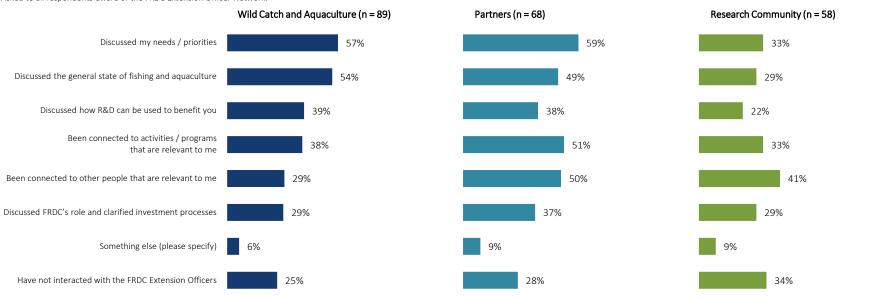




Are you aware of the FRDC Extension Officer Network? Asked to all respondents.



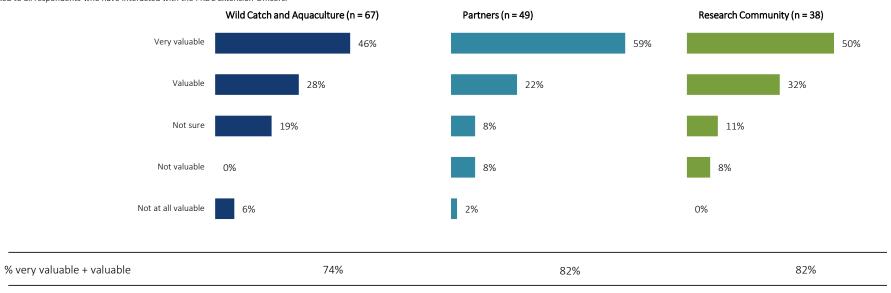
Which of the following interactions have you had with any of the FRDC Extension Officers? Please select all that apply. Asked to all respondents aware of the FRDC Extension Officer Network.



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



Thinking about the interactions you've had, how valuable do you think Extension Officers are? Asked to all respondents who have interacted with the FRDC Extension Officers.

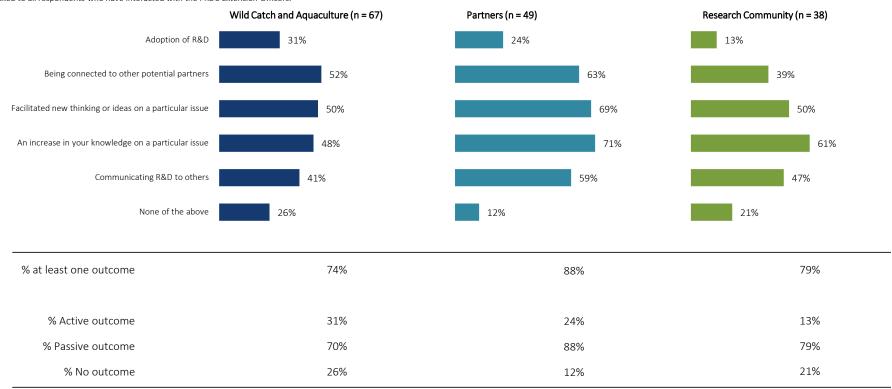


Reported outcomes from interacting with the FRDC Extension Officers

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

29% 47% 43%

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

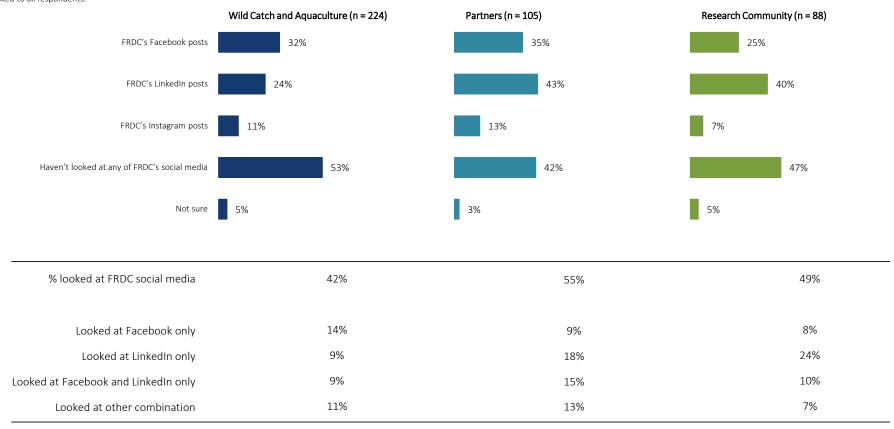


Interaction and outcomes from FRDC Extension Officers Asked to all respondents.

· ·	Wild Catch and Aquaculture (n = 224)		(n = 224)	Partners (n = 105)		Research Community (n = 88)
Interacted with the Extension Officers	2023: 2022:	29% 28% 17%		47% 44% 40%		43% 35% 10%
Of those who interacted						
% reported at least one outcome (active or passive)	2023: 2022:	74% <i>74% 59%</i>		88% 84% 68%		79% 86% 75%
Of all respondents						
Interacted with the Extension Officers AND reported at least one outcome (active or passive)	2023: 2022:	22% 21% 10%		41% 37% 28%		34% 30% 7%
Sub-groups of Fishing & Aquaculture		uaculture n = 96)	Commercial Wild Catch (n = 144)	Supply Chain (n = 68)	Indigenous (n = 20)	Recreational Fishers (n = 64)
Interacted with the Extension Officers		29%	31%	32%	45%	13%
Of those who interacted % reported at least one outcome (active or passive)		75%	76%	77%	89%	75%
Of all respondents Interacted with the Extension Officers AND reported at least one outcome (active or passive)		22%	24%	25%	40%	9%



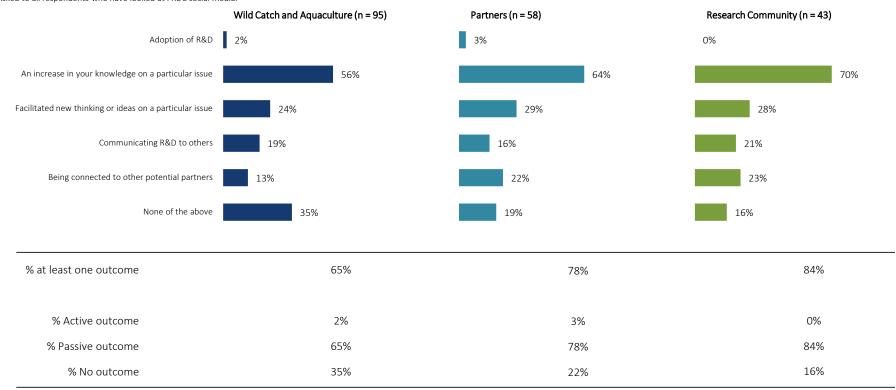
Over the past 12 months, have you looked at information or updates on these FRDC social media feeds? Please select all that apply. Asked to all respondents.



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

42% 55% 49%

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

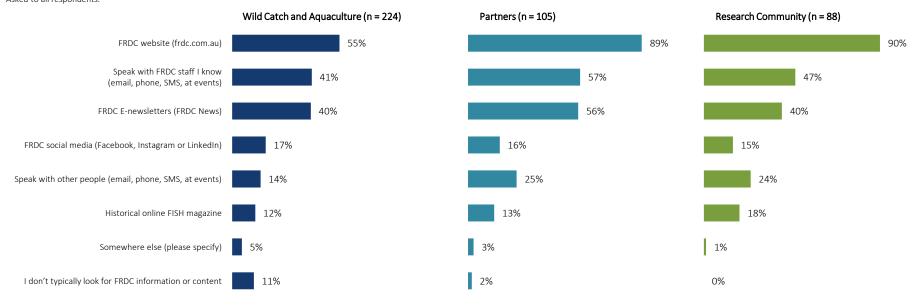


Interaction and outcomes from FRDC social media over the past 12 months $\mbox{\sc Asked}$ to all respondents.

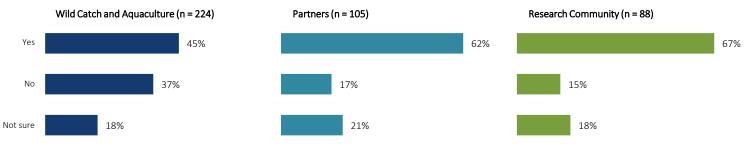
	Wild Catch and Ac	quaculture (n = 224)	Partners (n = 105)	R	esearch Community (n = 88)
Looked at FRDC social media	2023:* 3	2% 85% 81%	55% 46% 38%		49% 44% 35%
Of those who looked					
% reported at least one outcome (active or passive)	2023:* 7	5% ^{79%} ^{59%}	78% 81% 92%		84% 77% 72%
Of all respondents					
Looked at FRDC social media AND reported at least one outcome (active or passive)	2023:* 2	7% 27% 21%	43% 38% 35%		41% 34% 26%
Sub-groups of Fishing & Aquaculture	Aquacult (n = 96		atch Supply Chain (n = 68)	Indigenous (n = 20)	Recreational Fishers (n = 64)
Looked at FRDC social media	41%	44%	44%	55%	45%
Of those who looked % reported at least one outcome (active or passive)	64%	62%	60%	64%	62%
Of all respondents Looked at FRDC social media AND reported at least one outcome (active or passive)	26%	27%	26%	35%	28%

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

Asked to all respondents.



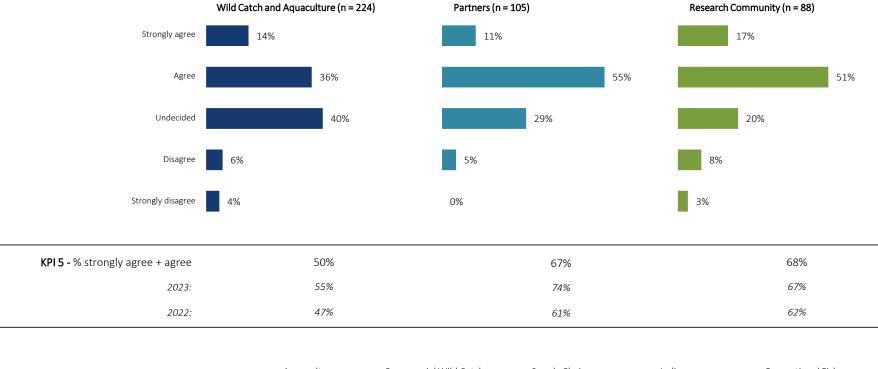
Over the past 12 months, have you come across information from FRDC that has described the impacts of the R&D it has supported? Asked to all respondents.







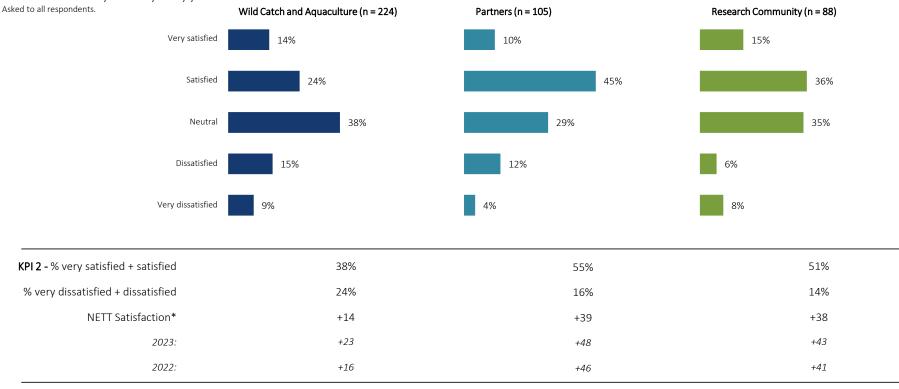
Would you agree or disagree that FRDC is transparent in how it communicates the impacts of the R&D it has supported? Asked to all respondents.



Sub-groups of Fishing & Aquaculture	Aquaculture	Commercial Wild Catch	Supply Chain	Indigenous	Recreational Fishers
	(n = 96)	(n = 144)	(n = 68)	(n = 20)	(n = 64)
KPI 5 - % strongly agree + agree	51%	47%	47%	50%	56%

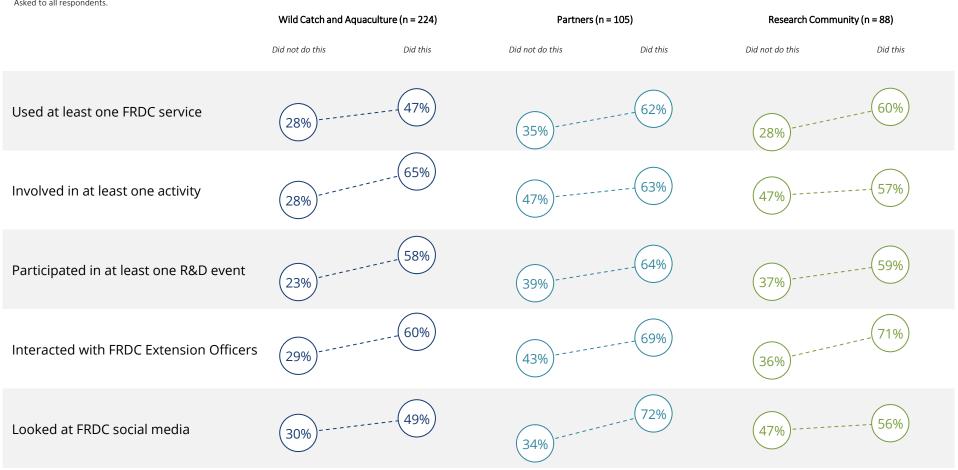


How satisfied are you that financial contributions from industry and Government to FRDC are being invested wisely and for the benefit of both the fishing and aquaculture sectors and the Australian community? Would you say you feel...?



Sub-groups of Fishing & Aquaculture	Aquaculture (n = 96)	Commercial Wild Catch (n = 144)	Supply Chain (n = 68)	Indigenous (n = 20)	Recreational Fishers (n = 64)
KPI 2 - % very satisfied + satisfied	45%	33%	32%	40%	41%
% very dissatisfied + dissatisfied	19%	27%	25%	20%	20%
NETT Satisfaction	+26	+6	+7	+20	+20

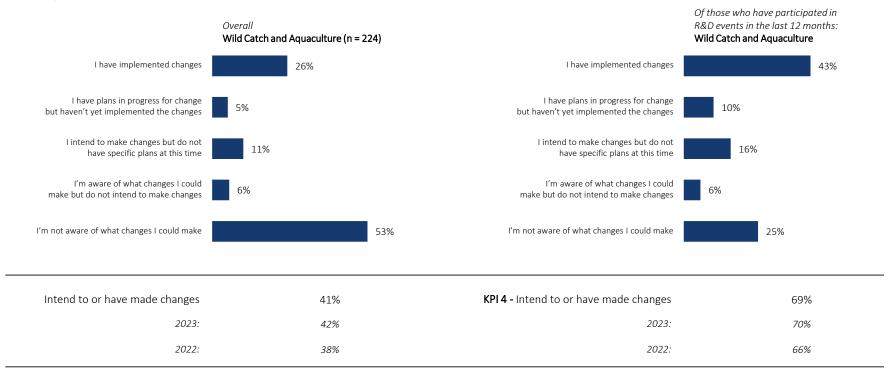
Proportion rating "Very satisfied" or "Satisfied" with FRDC investment across FRDC mechanisms Asked to all respondents.



Changes due to FRDC outcomes



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

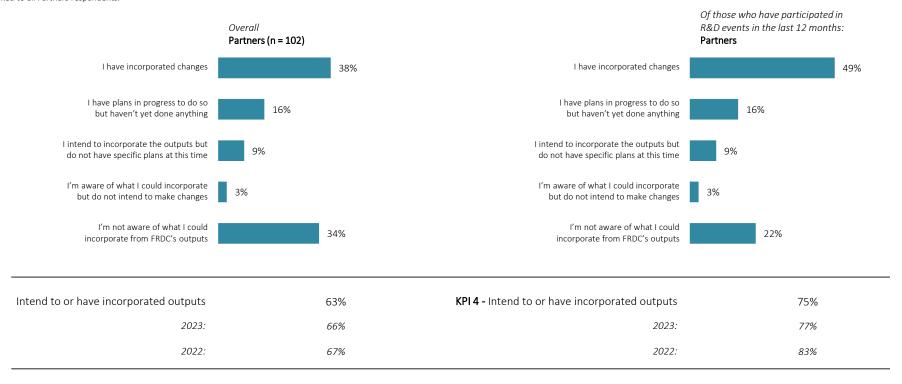


Sub-groups of Fishing & Aquaculture	Aquaculture (n = 96)	Commercial Wild Catch (n = 144)	Supply Chain (n = 68)	Indigenous (n = 20)	Recreational Fishers (n = 64)
Overall: Intend to or have made changes	50%	33%	43%	45%	37%
Of those who have participated in R&D events in the last 12 months: KPI 4 — Intend to or have made changes	78%	53%	68%	67%	77%

Changes due to FRDC outcomes



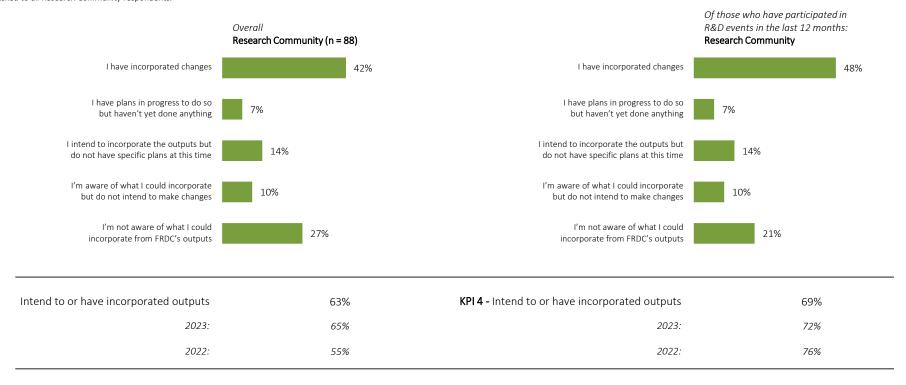
Thinking back over the last 3 years, have you incorporated any of FRDC's R&D outputs in your work? Asked to all Partners respondents.



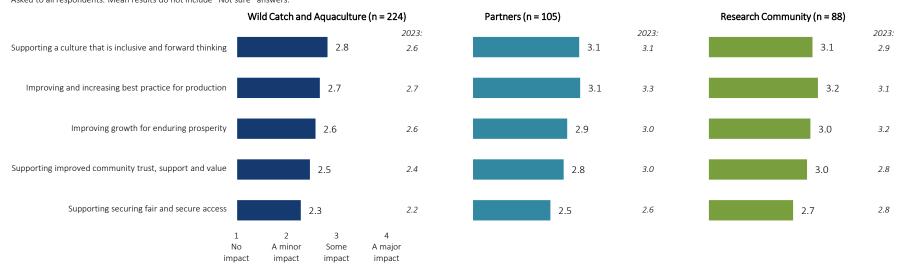
Changes due to FRDC outcomes



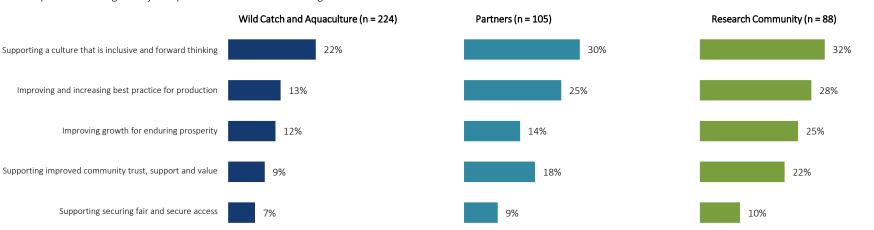
Thinking back over the last 3 years, have you incorporated any of FRDC's R&D outputs in your work? Asked to all Research Community respondents.



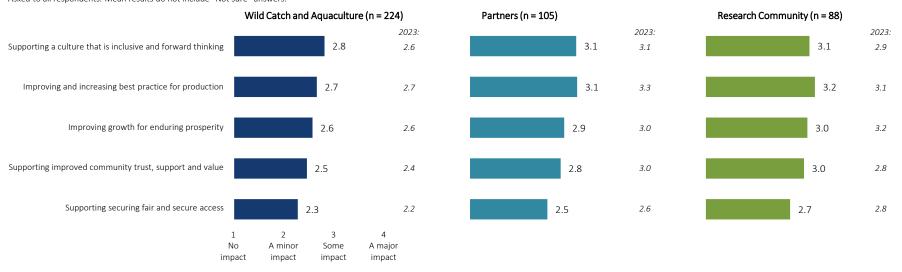
What impact, if any, do you think RD&E activities have had on the following areas for the Fishing and Aquaculture industries over the past 3 years? Asked to all respondents. Mean results do not include "Not sure" answers.



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

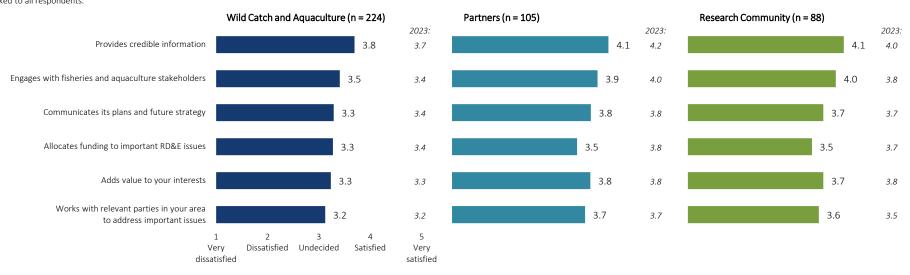


What impact, if any, do you think RD&E activities have had on the following areas for the Fishing and Aquaculture industries over the past 3 years? Asked to all respondents. Mean results do not include "Not sure" answers.

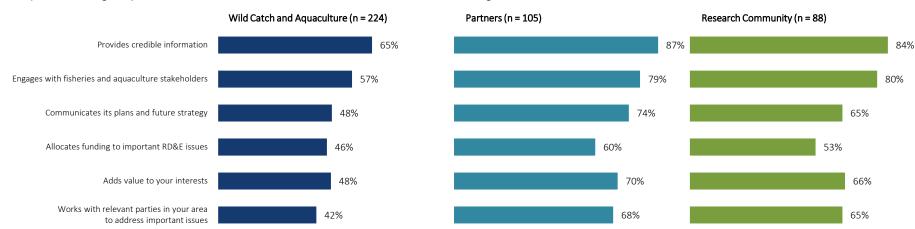


Sub-groups of Fishing & Aquaculture	Aquaculture (n = 96)	Commercial Wild Catch (n = 144)	Supply Chain (n = 68)	Indigenous (n = 20)	Recreational Fishers (n = 64)
Supporting a culture that is inclusive and forward thinking	2.9	2.7	2.9	3.2	2.8
Improving and increasing best practice for production	2.8	2.5	2.6	3.1	3.1
Improving growth for enduring prosperity	2.7	2.4	2.7	2.8	3.0
Supporting improved community trust, support and value	2.7	2.2	2.4	2.6	2.8
Supporting securing fair and secure access	2.5	2.0	2.3	2.5	2.7

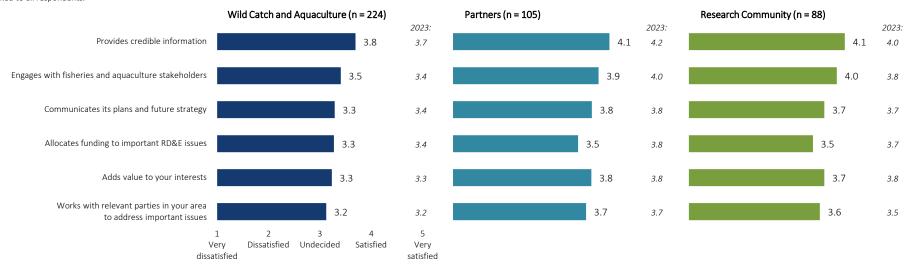
How satisfied are you that FRDC... Asked to all respondents.



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

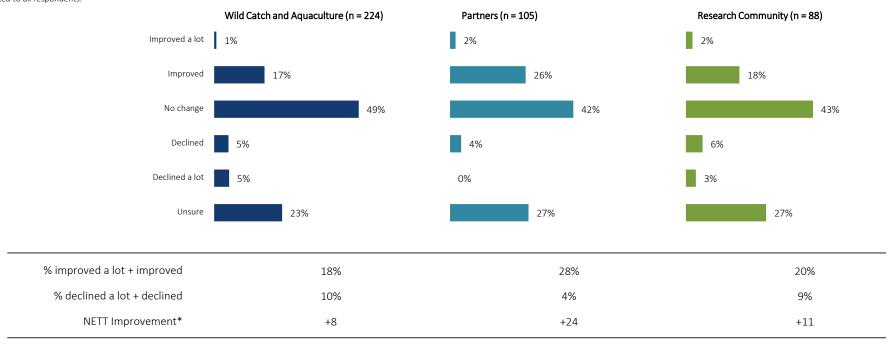


How satisfied are you that FRDC... Asked to all respondents.



Sub-groups of Fishing & Aquaculture	Aquaculture (n = 96)	Commercial Wild Catch (n = 144)	Supply Chain (n = 68)	Indigenous (n = 20)	Recreational Fishers (n = 64)
Provides credible information	4.0	3.5	3.7	3.8	3.8
Engages with fisheries and aquaculture stakeholders	3.6	3.3	3.4	3.6	3.4
Communicates its plans and future strategy	3.5	3.2	3.2	3.6	3.4
Allocates funding to important RD&E issues	3.5	3.2	3.2	3.6	3.2
Adds value to your interests	3.5	3.1	3.2	3.7	3.4
Works with relevant parties in your area to address important issues	3.4	3.0	3.0	3.5	3.2

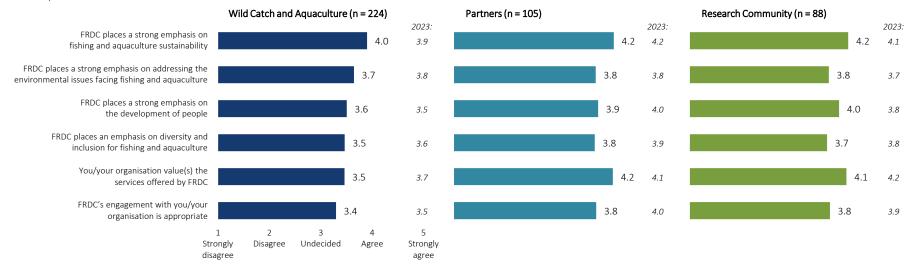
Would you say that FRDC's performance on these measures over the past 12 months has improved, stayed the same or declined? Asked to all respondents.



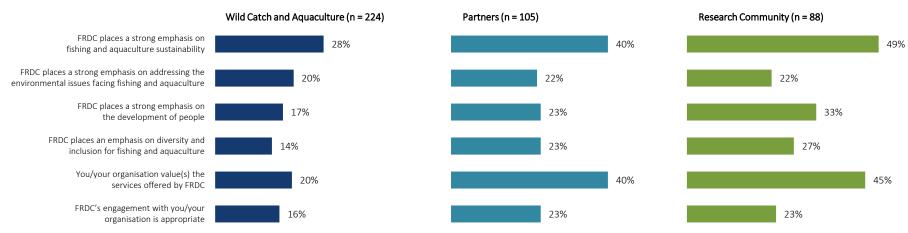
Sub-groups of Fishing & Aquaculture	Aquaculture (n = 96)	Commercial Wild Catch (n = 144)	Supply Chain (n = 68)	Indigenous (n = 20)	Recreational Fishers (n = 64)
% improved a lot + improved	21%	16%	18%	30%	23%
% declined a lot + declined	6%	13%	12%	10%	8%
NETT Improvement	+15	+3	+6	+20	+16



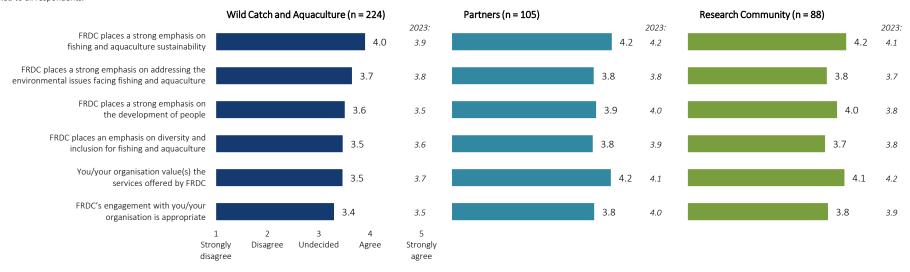
Based on your experience with FRDC over the past 12 months, would you agree or disagree that... Asked to all respondents.



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



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



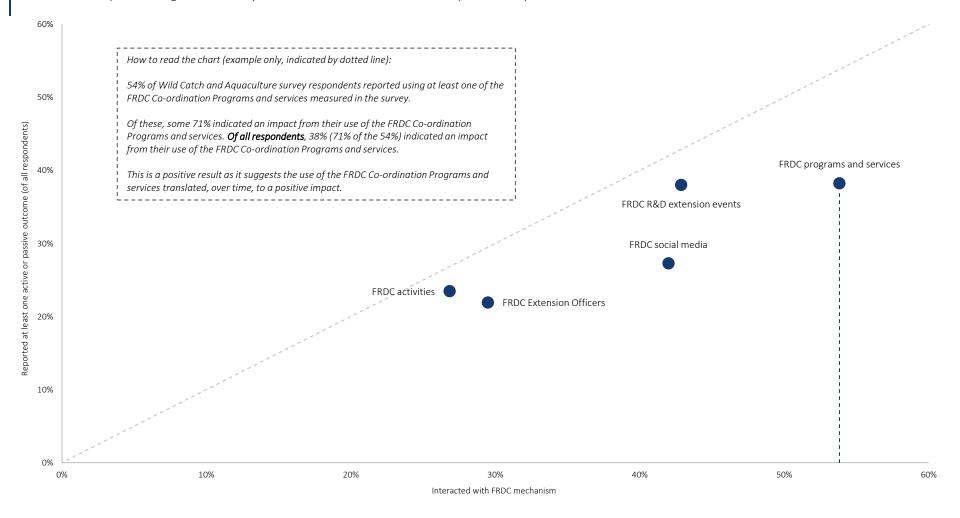
Sub-groups of Fishing & Aquaculture	Aquaculture (n = 96)	Commercial Wild Catch (n = 144)	Supply Chain (n = 68)	Indigenous (n = 20)	Recreational Fishers (n = 64)
FRDC places a strong emphasis on fishing and aquaculture sustainability	4.1	3.8	3.7	4.2	3.9
FRDC places a strong emphasis on addressing the environmental issues facing fishing and aquaculture	3.8	3.6	3.6	4.1	3.6
FRDC places a strong emphasis on the development of people	3.7	3.5	3.5	3.5	3.5
FRDC places an emphasis on diversity and inclusion for fishing and aquaculture	3.6	3.5	3.5	3.7	3.5
You/your organisation value(s) the services offered by FRDC	3.7	3.4	3.4	4.1	3.6
FRDC's engagement with you/your organisation is appropriate	3.6	3.2	3.3	3.8	3.4



An overview of the impact of FRDC engagement mechanisms: Wild Catch and Aquaculture

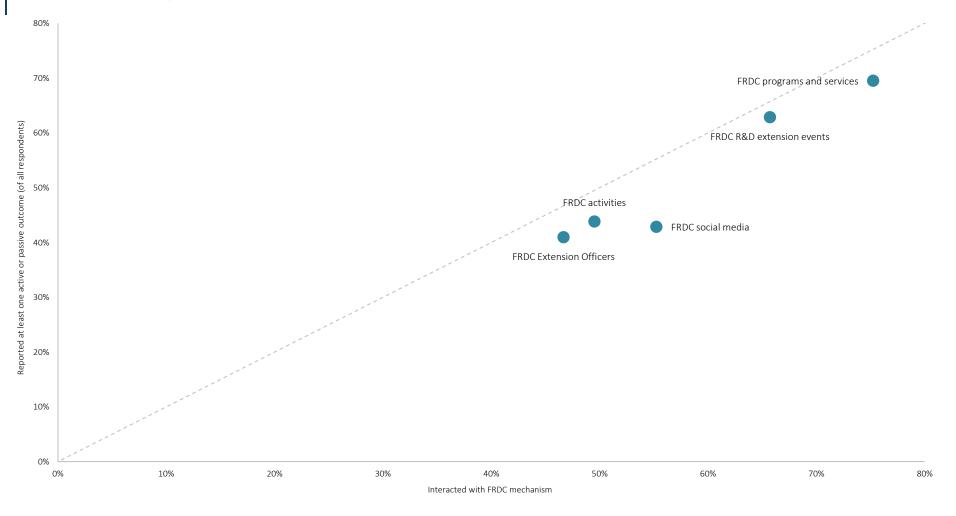
Across the 2024 Stakeholder Survey, respondents were asked to report on their awareness and involvement with various FRDC engagement mechanisms. A measure of the 'impact' of this involvement was also taken.

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



Across the 2024 Stakeholder Survey, respondents were asked to report on their awareness and involvement with various FRDC engagement mechanisms. A measure of the 'impact' of this involvement was also taken.

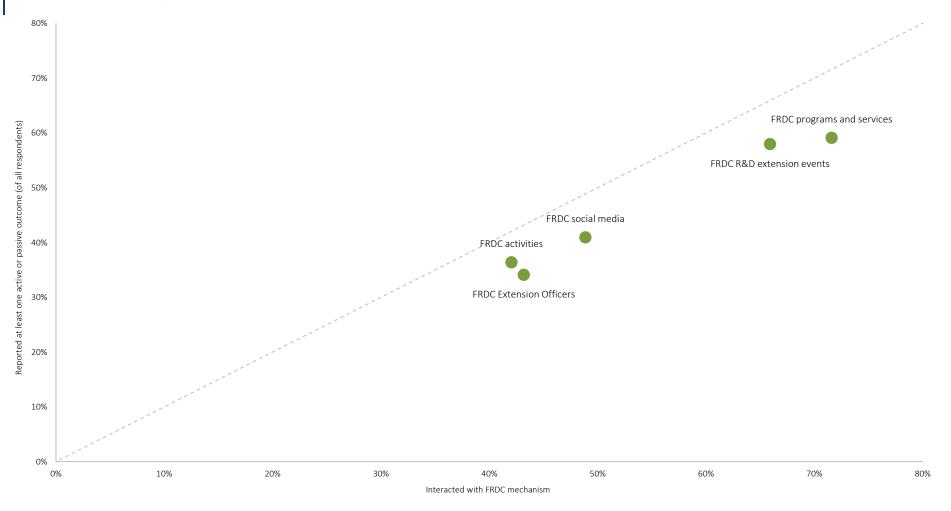
The chart below provides a high-level summary of these results for the Partner respondents.



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

Across the 2024 Stakeholder Survey, respondents were asked to report on their awareness and involvement with various FRDC engagement mechanisms. A measure of the 'impact' of this involvement was also taken.

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





Sample size: n = 96

Key metr	rics		FRDC mechanisms and outcom	nes		
.4	45%	% satisfied that financial contributions to FRDC are being invested wisely and benefit the fishing and	Interaction with FRDC mechanism	Did this		Reported an outcome *
	1370	aquaculture sectors and the Aus community	Used at least one FRDC service	49%		77%
Q	51%	% agree that FRDC is transparent in how it communicates the impacts of R&D it has supported	Involved in at least one activity	28%	▶	93%
		communicates the impacts of R&D it has supported	Participated in at least one R&D event	47%		93%
XX X	50%	Intend to or have made changes to practices because of outcomes from FRDC info, services or R&D projects	Interacted with the Extension Officers	29%		75%
101		over the last 3 years	Looked at FRDC social media	41%		64%
~~	+15	NETT Improvement of FRDC's performance over the past 12 months (scale of -100 to +100)	Statements about FRDC			
Industry	sentimen	†			% agree	
		NETT Sentiment of the future of Aus fishing /	FRDC places a strong em fishing and aquaculture sus		85%	2
44	+53	aquaculture industry over the next 12 months (scale of -100 to +100)	FRDC places a strong emphasis on addre environmental issues facing fishing and aq		71%	63
			FRDC places a strong em the development		61%	
What FR	DC does o	lirectly	FRDC's engagement with organisation is ap		61%	
~	97%	% who recall at least one FRDC responsibility and role (when prompted with a list)	You/your organisation va services offered		60%	
	40%	% who recall all three FRDC responsibilities and roles (when prompted with a list)	FRDC places an emphasis on divinclusion for fishing and aq		57%	

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

Sample size: n = 144

Key met	rics		FRDC mechanisms and outcomes					
14	33%	% satisfied that financial contributions to FRDC are being invested wisely and benefit the fishing and	Interaction with FRDC mechanism	Did this		Reported an outcome *		
		aquaculture sectors and the Aus community	Used at least one FRDC service	58%		67%		
Q	47%	% agree that FRDC is transparent in how it communicates the impacts of R&D it has supported	Involved in at least one activity	23%	▶	82%		
		communicates the impacts of R&D it has supported	Participated in at least one R&D event	41%	▶	83%		
×↑ 6×	33%	Intend to or have made changes to practices because of outcomes from FRDC info, services or R&D projects	Interacted with the Extension Officers	31%		76%		
UA		over the last 3 years	Looked at FRDC social media	44%		62%		
~~	+3	NETT Improvement of FRDC's performance over the past 12 months (scale of -100 to +100)	Statements about FRDC					
Industry	sentimer	nt			% agree			
······································		NETT Sentiment of the future of Aus fishing /	FRDC places a strong em fishing and aquaculture sus		76%	20		
44	-6	aquaculture industry over the next 12 months (scale of -100 to +100)	FRDC places a strong emphasis on addreenvironmental issues facing fishing and aq		60%	63		
			You/your organisation va services offered	alue(s) the d by FRDC	55%			
What FR	DC does o	directly	FRDC places an emphasis on div inclusion for fishing and aq		51%			
✓	95%	% who recall at least one FRDC responsibility and role (when prompted with a list)	FRDC places a strong em the development		51%			
	35%	% who recall all three FRDC responsibilities and roles (when prompted with a list)	FRDC's engagement with organisation is ap		44%			

Key metrics			FRDC mechanisms and outcom	nes		
16	32%	% satisfied that financial contributions to FRDC are being invested wisely and benefit the fishing and	Interaction with FRDC mechanism	Did this		Reported an outcome *
	aquaculture sectors and the Aus community		Used at least one FRDC service	65%		73%
Q	47%	% agree that FRDC is transparent in how it communicates the impacts of R&D it has supported	Involved in at least one activity	25%		88%
		communicates are impacts of Nass renas supported	Participated in at least one R&D event	46%		84%
X	43%	Intend to or have made changes to practices because of outcomes from FRDC info, services or R&D projects	Interacted with the Extension Officers	32%	→	77%
10X		over the last 3 years	Looked at FRDC social media	44%		60%
~~	+6	NETT Improvement of FRDC's performance over the past 12 months (scale of -100 to +100)	Statements about FRDC			
Industry sentiment		t			% agree	
		NETT Sentiment of the future of Aus fishing /	FRDC places a strong emphasis on fishing and aquaculture sustainability 76%		20	
44	+4	aquaculture industry over the next 12 months (scale of -100 to +100)	FRDC places a strong emphasis on addre environmental issues facing fishing and aq		65%	63
			You/your organisation va services offered	llue(s) the d by FRDC	54%	
What FRDC does directly		lirectly	FRDC places an emphasis on divinclusion for fishing and aq		53%	
✓	94%	% who recall at least one FRDC responsibility and role (when prompted with a list)	FRDC places a strong emphasis on the development of people		51%	
	29%	% who recall all three FRDC responsibilities and roles (when prompted with a list) FRDC's engagement with you/your organisation is appropriate		47%		

Sample size: $n = 20$	Samp	le size:	n = 20
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Key metrics			FRDC mechanisms and outcom	ies		
14	40%	% satisfied that financial contributions to FRDC are being invested wisely and benefit the fishing and	Interaction with FRDC mechanism	Did this		Reported an outcome *
	aquaculture sectors and the Aus community		Used at least one FRDC service	50%		90%
Q	50%	% agree that FRDC is transparent in how it communicates the impacts of R&D it has supported	Involved in at least one activity	35%		100%
		communicates the impacts of Nab it has supported	Participated in at least one R&D event	60%		100%
×↑ 6×	45%	Intend to or have made changes to practices because of outcomes from FRDC info, services or R&D projects	Interacted with the Extension Officers	45%		89%
101		over the last 3 years	Looked at FRDC social media	55%		64%
,,,,	+20	NETT Improvement of FRDC's performance over the past 12 months (scale of -100 to +100)	Statements about FRDC			
Industry	, sentimer	nt			% agree	_
Industry sentiment		NETT Sentiment of the future of Aus fishing /	FRDC places a strong em fishing and aquaculture sus		80%	2
44	+45	aquaculture industry over the next 12 months (scale of -100 to +100)	FRDC places a strong emphasis on addre environmental issues facing fishing and aq		75%	63
			You/your organisation va services offered		65%	
What FRDC does directly		directly	FRDC's engagement with organisation is ap	, ,	55%	
~	95%	% who recall at least one FRDC responsibility and role (when prompted with a list)	FRDC places an emphasis on diversity and inclusion for fishing and aquaculture		50%	
	50%	% who recall all three FRDC responsibilities and roles (when prompted with a list)	FRDC places a strong em the development		50%	

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

Key metrics

16	41%	% satisfied that financial contributions to FRDC are being invested wisely and benefit the fishing and aquaculture sectors and the Aus community
Q	56%	% agree that FRDC is transparent in how it communicates the impacts of R&D it has supported
×1 6×	37%	Intend to or have made changes to practices because of outcomes from FRDC info, services or R&D projects over the last 3 years
	+16	NETT Improvement of FRDC's performance over the past 12 months (scale of -100 to +100)

FRDC mechanisms and outcomes

Interaction with FRDC mechanism	Did this	→	Reported an outcome *
Used at least one FRDC service	53%		76%
Involved in at least one activity	11%		71%
Participated in at least one R&D event	20%		92%
Interacted with the Extension Officers	13%		75%
Looked at FRDC social media	45%		62%

Industry sentiment



+25

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

Statements about FRDC

	% agree	
	77%	FRDC places a strong emphasis on fishing and aquaculture sustainability
63	63%	FRDC places a strong emphasis on addressing the environmental issues facing fishing and aquaculture
	59%	You/your organisation value(s) the services offered by FRDC
	58%	FRDC places an emphasis on diversity and inclusion for fishing and aquaculture
	55%	FRDC's engagement with you/your organisation is appropriate
	48%	FRDC places a strong emphasis on the development of people

What FRDC does directly



92%

% who recall at least one FRDC responsibility and role (when prompted with a list)

50%

% who recall all three FRDC responsibilities and roles (when prompted with a list)

Which of the following sectors of the seafood industry do you operate in? Please select all that apply.	Wild Catch and Aquaculture (n = 224) *	Partners (n = 0)	Research Community (n = 0)
Commercial wild catch	64%	Not asked to this segment	Not asked to this segment
Aquaculture	43%	Not asked to this segment	Not asked to this segment
Processing	20%	Not asked to this segment	Not asked to this segment
Wholesaler	13%	Not asked to this segment	Not asked to this segment
Exporter	11%	Not asked to this segment	Not asked to this segment
Recreational fisher	7%	Not asked to this segment	Not asked to this segment
Indigenous	5%	Not asked to this segment	Not asked to this segment
Importer	3%	Not asked to this segment	Not asked to this segment
Retail	2%	Not asked to this segment	Not asked to this segment

Which of the following best describes your organisation? Please select all that apply.	Wild Catch and Aquaculture (n = 0)	Partners (n = 105)	Research Community (n = 0)
State/Territory Government department or agency	Not asked to this segment	40%	Not asked to this segment
Industry association	Not asked to this segment	22%	Not asked to this segment
Not-for profit organisation	Not asked to this segment	20%	Not asked to this segment
Federal Government department or agency	Not asked to this segment	16%	Not asked to this segment
Fisheries Management	Not asked to this segment	9%	Not asked to this segment
National resource manager	Not asked to this segment	4%	Not asked to this segment

Which of the following best describes your organisation? Please select all that apply.	Wild Catch and Aquaculture (n = 0)	Partners (n = 0)	Research Community (n = 88)
Australian University	Not asked to this segment	Not asked to this segment	42%
Private sector researcher	Not asked to this segment	Not asked to this segment	35%
Government Fisheries Organisation	Not asked to this segment	Not asked to this segment	10%
International Research Organisation	Not asked to this segment	Not asked to this segment	2%
TAFE	Not asked to this segment	Not asked to this segment	2%

Which of the following species categories do you operate in? Please select all that apply.	Wild Catch and Aquaculture (n = 224) *	Partners (n = 0)	Research Community (n = 0)
Finfish	52%	Not asked to this segment	Not asked to this segment
Molluscs	39%	Not asked to this segment	Not asked to this segment
Crustaceans	38%	Not asked to this segment	Not asked to this segment
Other	11%	Not asked to this segment	Not asked to this segment

Which states/territories do you operate in? Please select all that apply.	Wild Catch and Aquaculture (n = 224) *	Partners (n = 0)	Research Community (n = 0)
New South Wales	24%	Not asked to this segment	Not asked to this segment
Queensland	24%	Not asked to this segment	Not asked to this segment
South Australia	22%	Not asked to this segment	Not asked to this segment
Tasmania	17%	Not asked to this segment	Not asked to this segment
Western Australia	17%	Not asked to this segment	Not asked to this segment
Victoria	13%	Not asked to this segment	Not asked to this segment
Commonwealth	7%	Not asked to this segment	Not asked to this segment
Northern Territory	7%	Not asked to this segment	Not asked to this segment
Australian Capital Territory	1%	Not asked to this segment	Not asked to this segment

How long have you been involved with FRDC in this role?	Wild Catch and Aquaculture (n = 0)	Partners (n = 102)	Research Community (n = 88)
10 years or longer	Not asked to this segment	48%	53%
5 years to less than 10 years	Not asked to this segment	15%	14%
2 years to less than 5 years	Not asked to this segment	20%	16%
1 year to less than 2 years	Not asked to this segment	11%	11%
6 months to less than 12 months	Not asked to this segment	5%	2%
Less than 6 months	Not asked to this segment	2%	3%

Are you currently involved in a contracted research project with FRDC?	Wild Catch and Aquaculture (n = 0)	Partners (n = 0)	Research Community (n = 83)
Yes	Not asked to this segment	Not asked to this segment	46%
No	Not asked to this segment	Not asked to this segment	54%

Which gender do you identify with?	Wild Catch and Aquaculture (n = 224) *	Partners (n = 105)	Research Community (n = 88)
Male	81%	62%	60%
Female	17%	33%	36%
Non-binary	0%	0%	0%
Prefer not to say	1%	5%	3%
Which of the following age groups do you belong to?	Wild Catch and Aquaculture (n = 224) *	Partners (n = 105)	Research Community (n = 88)
18 to 24 years	0%	1%	2%
25 to 34 years	4%	6%	5%
35 to 44 years	16%	14%	18%
45 to 54 years	25%	36%	22%
55 to 64 years	30%	27%	34%
65 years and over	25%	16%	19%
Are you of Aboriginal or Torres Strait Islander origin?	Wild Catch and Aquaculture (n = 224) *	Partners (n = 105)	Research Community (n = 88)
No, not Aboriginal or Torres Strait Islander	92%	88%	94%
Yes, Aboriginal	4%	3%	0%
Yes, Torres Strait Islander	<1%	1%	0%
Yes, Aboriginal and Torres Strait Islander	<1%	0%	0%
Don't know / prefer not to say	3%	9%	6%
What was your total revenue in the last financial year, ending June 30, 2024?	Wild Catch and Aquaculture (n = 221) *	Partners (n = 0)	Research Community (n = 0)
No revenue	5%	Not asked to this segment	Not asked to this segment
Less than \$500k	31%	Not asked to this segment	Not asked to this segment
Less than \$500k \$500k to less than \$1M	31% 12%	Not asked to this segment Not asked to this segment	Not asked to this segment Not asked to this segment
•		-	-
\$500k to less than \$1M	12%	Not asked to this segment	Not asked to this segment
\$500k to less than \$1M \$1M to less than \$2M	12% 7%	Not asked to this segment Not asked to this segment	Not asked to this segment Not asked to this segment
\$500k to less than \$1M \$1M to less than \$2M \$2M to less than \$5M	12% 7% 6%	Not asked to this segment Not asked to this segment Not asked to this segment	Not asked to this segment Not asked to this segment Not asked to this segment

^{*}Results are provided unweighted.

Research design

A strong and mature relationship between FRDC and its stakeholders, which acknowledges FRDC's goals but at the same time the operating pressures stakeholders confront, underpins the pathway t success for the FRDC Strategic Plan. FRDC have identified the need to measure the engagement and satisfaction of a range of its key stakeholders. The 2024 Stakeholder Survey provides the mechanism to collect feedback and provide FRDC with measures of the health of their stakeholder relationships and the perception of progress against the Strategic Plan targets.

Target audiences

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

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

Methodology

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

Questionnaire

The 2024 FRDC Stakeholder Research involved a 17-minute questionnaire of up to 34 questions. This measured, amongst other things:

- Stakeholder sentiment
- o Council of Rural Research and Development Corporations (CRRDC) KPI's
- o Feedback on FRDC programs and services
- o Feedback on the FRDC Extension Officer Network (EON)

- o Communications from FRDC
- FRDC key indicators
- o Respondent profiles
- o Voice of the stakeholder

Sample and Response

A sample list of stakeholders for this research was provided by FRDC. In total, n = 524 interviewers were completed with stakeholders. This included:

- o n = 331 Fishing and Aquaculture (including the Wild Catch and Aquaculture segment of n = 224 those who self-identified as being involved in commercial wild catch and/or aquaculture operating businesses);
- o n = 105 Partners; and
- o n = 88 Research Community.

Timing

The data collection for the 2024 FRDC Stakeholder Research was undertaken between the 10th October 2024 to the 21st November 2024.

Weighting

For the Wild Catch and Aquaculture stakeholder audience, data were weighted such that the results reflected a 50/50 split of aquaculture and commercial wild catch respondents. No weighting was use for the Partner and Research Community stakeholder audiences.

2024 FRDC Stakeholder Research December 2024

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

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

www.intuitivesolutions.com.au