Proposed sampling strategy for Australian Wild Barramundi

Updated 13th December 2019

Information will be gathered from the following

1. A minimum of 10 interviews with fishers
2. In depth discussions with industry associations and other stakeholders
3. A minimum of 35 face to face interviews with supply chain participants
4. A minimum of 15 - 20 telephone/online survey completions from supply chain participants.

To enable gathering of data from as wide a spectrum of supply chain stakeholders as possible the online survey will be available to be promoted widely through project participants and their networks. Thus there may be far more than the 15 to 20 online survey responses analysed as part of this project.

Interviewers

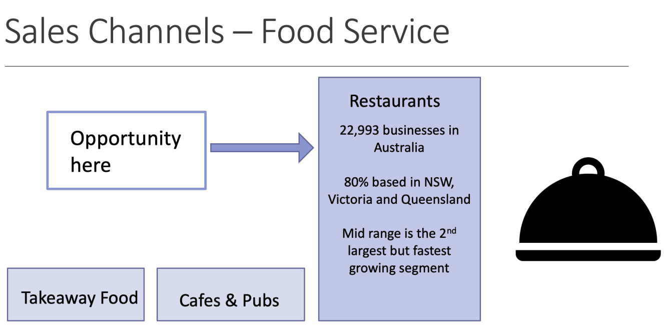
To avoid the introduction of interviewer bias the University of Sunshine Coast will conduct all the interviews. This does not preclude additional information being collected by fishers and industry association representatives. Options for training these people in face to face interview techniques will be considered as part of this project.

Sampling Considerations:

The sampling strategy (as per table below) has been developed to ensure representation across different food service and hospitality sectors (based on potential for wild barramundi and sector size) as well as spatial representation.

There are just over 800 seafood wholesalers and distributors in Australia. The majority are small locally owned businesses with no one company holding significant market share (SFM – 3-4%, Tassal Group – 2-3%). It is a highly competitive sector particularly in relation to competition for product. Restaurants and fishmongers will typically only deal with their trusted wholesaler/distributor. Supermarkets are looking to bypass wholesalers to deal directly with vertically integrated seafood companies ie. those with catching/growing and processing capability

The **food service sales channel, particularly the potential opportunities supplying restaurants, will be the focus of the project**. However, it is important that the other channels are considered as well.



Previous consumer research confirms that barramundi is perceived to be 'native' to both Queensland and the Northern Territory with consequent flow on to higher demand in these regions as it is the ‘local’ fish. However, the key markets of Sydney and Melbourne need to be covered. Consequently, a quota approach will be used to select respondents to ensure Queensland and the Northern Territory are represented as well as Sydney and Melbourne. Referrals will be sought from fishers for key distribution channel partners and end customers for inclusion in the sampling pool.

An interview protocol will be prepared comprising a mix of qualitative and quantitative questions. All respondents will receive an electronic version of the protocol before the face to face interview.

In addition to the 35 face to face interviews detailed in the table below, a minimum of 15 additional responses will be obtained either by phone or online. These additional responses may flow from fisher recommendations or “snowball” from the face to face interviews (ie face to face respondents will be asked if they would recommend other interviewees).

Sector	**Potential for wild barramundi**	**Size of sector**	**Sampling quota**	**Spatial representation**
Catering services (for all sectors)	MEDIUM	large	2	National
HOTELS ETC Functions and events	LOW (except perhaps smaller/upmarket)	medium	2	2 from different states
Pubs and clubs (Hotels med/high end restaurants)	Medium	Medium	4	1 in Qld 1 in NT 1 NSW 1 Vic
Restaurants – medium cost	HIGH	medium	4	1 in Qld 1 in NT 1 in NSW 1 in Vic
Restaurants – high end	HIGH	small	8	2 in Qld/NT 2 in NSW 2 in Vic 2 other
Resorts/Casinos	Medium	medium	4	2 in Qld/NT 2 in NSW/Vic
Cruise ships/Airlines	LOW Premium Restaurant/1st class only	small	1	National
PROCESSOR/DISTRIBUTORS	HIGH	high	6	2 in Qld/NT 2 in NSW/Vic 2 other
Referrals from fishers (not elsewhere included above)			4	All
Total			**35**	