



(Incorporating TQA Research)

FRDC 2005 Stakeholder Groups Research

Final Report

Prepared for:	Fisheries Research & Development Corporation
Date:	September 2005
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Executive Summary

This Executive Summary document presents the major highlights and strategic implications relating to the Stage 3 Telephone Survey component of the 2005 FRDC Stakeholder Groups Research Project. Ipsos (incorporating TQA Research) is quite confident that the survey results accurately reflect the perceptions and opinions of the Australian fisheries sector. However, sample sizes are too small to further report on the extent of differences across stakeholder types.

1.1 Background and What We Did

FRDC commissioned Ipsos (incorporating TQA Research) in late 2004 to undertake market research with stakeholder groups. The project aims were to determine the understanding, needs, expectations and attitudes of stakeholders toward current FRDC activity and R&D priorities. Outcomes of the research are expected to provide FRDC with a clear direction on how to best refine operational and communication programs and activities, and additionally, establish relevant key performance indicator benchmarks.

The Stakeholder Telephone Survey results presented (Stage 3 of 4) are based on 201 interviews conducted with business operators in the fisheries sector Australia wide. The sample comprises of a high proportion of ‘grassroots’ operators and includes post harvest businesses and recreational fishing association representatives. Contact lists were sourced via industry groups and associations, FRDC and other industry contacts, to ensure a good cross-section of key fisheries sectors were represented in this important benchmark ‘snapshot’ survey.

The survey was undertaken from 2 to 27 June 2005 and averaged 20 minutes in length.

1.2 Major Highlights

Solid awareness and knowledge of FRDC is evident, mainly attributed to industry sources...

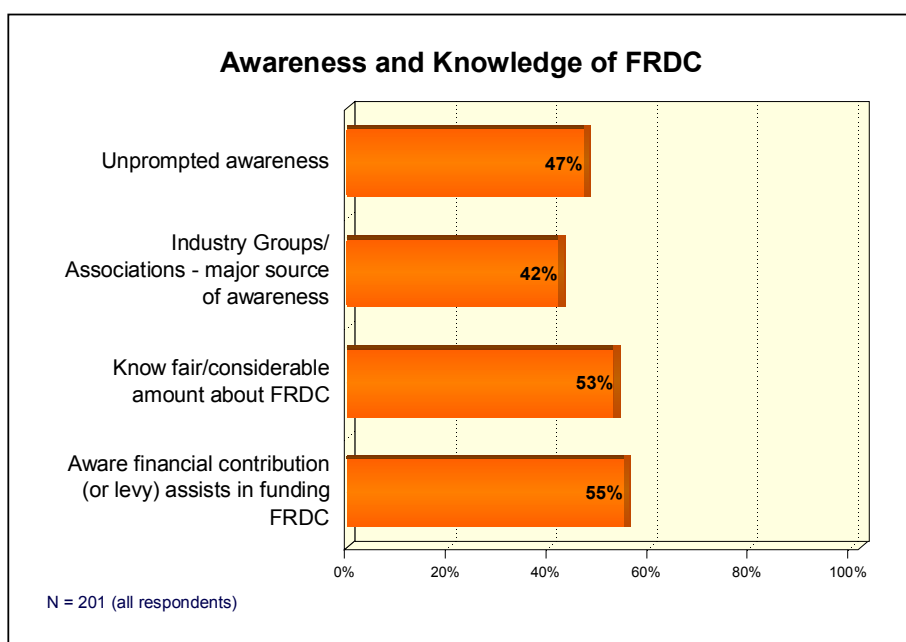
The survey reveals a fair degree of awareness and understanding of FRDC, supported by the following findings:

- Almost half (47%) correctly recall FRDC as the organisation responsible for investing in national fisheries research and development...see chart overleaf. Total awareness (unprompted and prompted) of FRDC is 87%.

- Industry groups or associations are clearly identified as the major source of awareness of FRDC and its activities (42%), with industry newsletters and publications identified as specifically important (especially for new technology and practice based information). Other sources include government departments and contact with FRDC (e.g. direct, R&D News, conferences and website).

Also worth noting that, 45% of respondents cited industry associations as a key contact point when looking for information about conducting R&D.

- Claimed knowledge of FRDC is encouraging with over half (53%) of respondents interviewed stating they know a *fair* or *considerable* amount about the organisation – typically higher amongst larger businesses (7+ staff).



- When asked to identify perceived FRDC roles and responsibilities (unaided), a mix of strategic and operational responsibilities are highlighted. Of particular note are strong references to *managing R&D* and *administering funding*, while a number of mentions relate to managing high profile issues such as *sustainability*, *economic viability* and *industry competitiveness*.
- Seven in ten (71%) recognise that they contribute financially towards fisheries R&D activities, while just over half (55%) of all respondents aware that their financial contributions (or levies) assist in actually funding FRDC – notably higher among large businesses, aquaculture grassroots operators and those involved with industry groups or associations.

FRDC's overall performance is rated highly by a majority of those aware of the organisation...

- The survey found that of those aware of FRDC, 58% rated the organisation's performance as investors in Fisheries R&D highly (see chart overleaf) – a promising result and a solid platform to build on in future surveys, in particular, increasing the proportion rating FRDC *very high*.

Of note, is the fact that overall *high* ratings for FRDC ranged from 28% to 88% across the different fisheries sectors surveyed, indicating significant variation in perceived performance (even when taking small sample sizes into account). Similar *high* ratings were noted among Aquaculture (62%) and Wild catch (55%) grassroots operators.

- A greater proportion of survey respondents have positive rather than negative impressions of FRDC. Favourable reaction to the organisation's performance is more likely to be attributed to the following perceptions:
 - Conduct of worthwhile research
 - Amount of funding available and allocated
 - Prioritising of projects and targeting of key issues

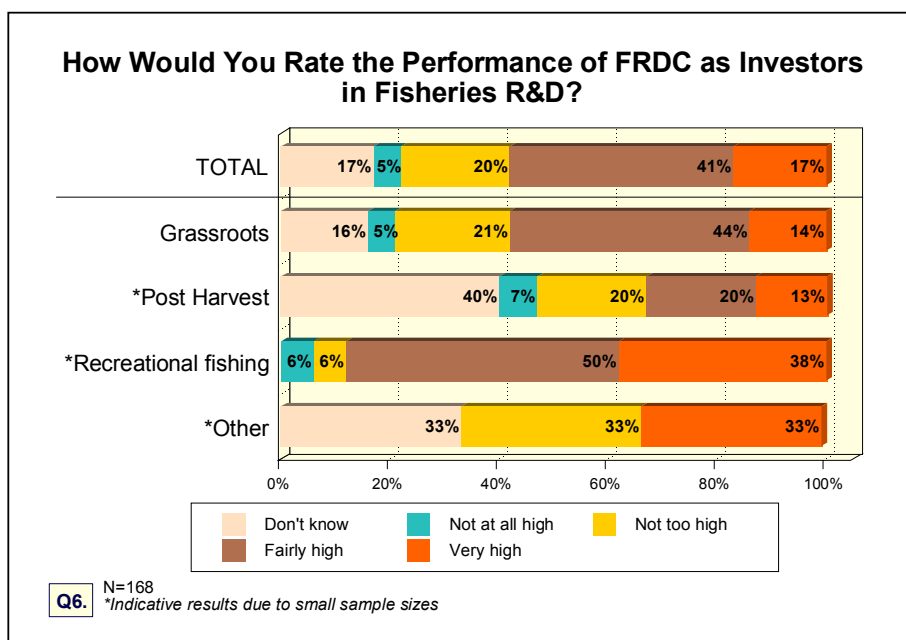
A common verbatim comment made includes:

“From the feedback that we get, for what they are putting their money into and the results they get, they spread themselves pretty well.”

It is worth noting that, around one half (49%) of respondents aware of FRDC believe the organisation is spoken of highly by their peers – certainly an encouraging result and a survey measure that should be tracked over time.

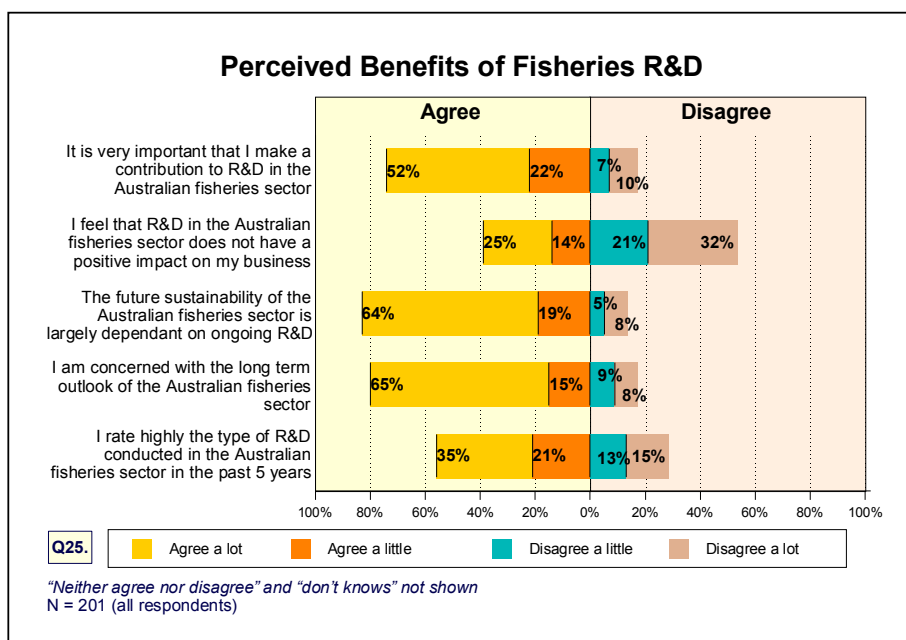
A number of negative observations were made referring to a perceived *lack of communication* and some concern about the relevance of research undertaken by FRDC.

“I don't understand what they do and all the money they spend.”



Many recognise the importance of R&D to the future of their business and the fisheries sector...

- More than half of all respondents (56%) rate highly Australian fisheries R&D conducted in the last 5 years, while a similar proportion (57%) feel they have benefited from fisheries R&D in the part 5 years. While again only indicative, these results appear to vary somewhat across the different fisheries sectors surveyed.
- A healthy 53% of respondents view fisheries R&D as having a positive impact on their business, although a challenge exists to increase this proportion in the next few years...see chart overleaf. The main benefits identified (unprompted) include *research into different species*, followed by *breeding/genetics programs*, *fish health*, *fish stocks* and *environmental research*.
- A cross section of issues were identified as requiring greater attention through fisheries R&D, focussing on *marketing/market information*, *water quality/pollution*, *closure of fishing areas* and *fish stocks*.
- FRDC is acknowledged for its *significant* role in achieving direct benefit from research by three fifths (60%) of respondents aware of FRDC – an encouraging result for FRDC to build on in the future.

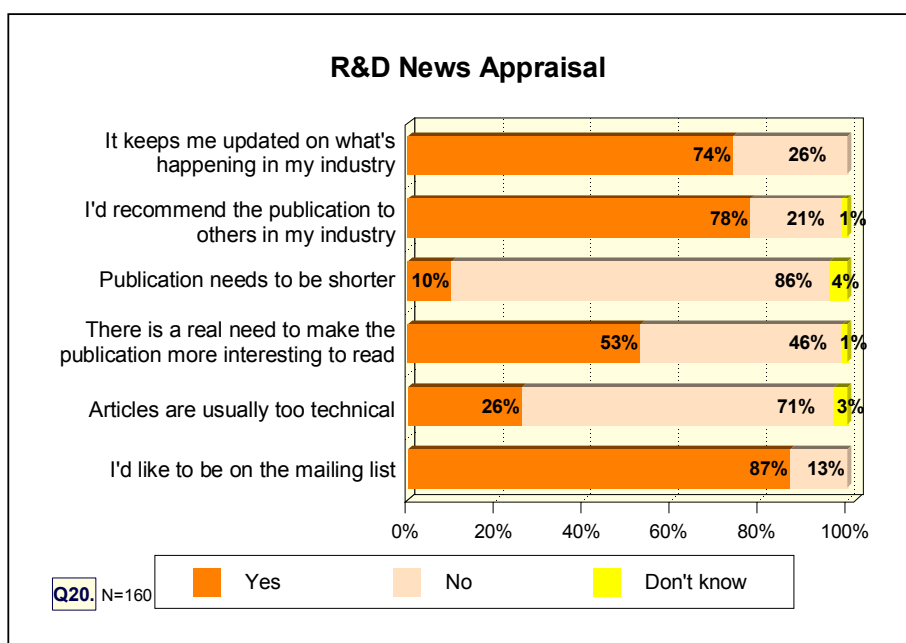


- The future of the sector is considered a key issue for respondents, with most (80%) concerned with the long-term outlook of Australian fisheries. Most agree that its sustainability is largely dependent on ongoing R&D (83%), while a high proportion (74%) recognise that it is important for them to make a contribution to help R&D.
- Interestingly, six in ten (60%) respondents claim to conduct their own R&D (as defined by themselves), in particular larger business operators (7+ staff) and younger age (up to 40 years). A similar proportion (59%) agree that it is hard for businesses to source funding to conduct their own research, with more than one quarter (29%) having sourced financial assistance from either state government, federal government and industry.

Business operators value R&D News and want to learn more about FRDC ...

- Survey results reveal strong demand for increased information and contact with FRDC supported by the findings.
 - Vast majority (93%) of those aware of FRDC are of opinion that it is important for FRDC to interact and communicate more with stakeholders throughout the whole fisheries supply chain.
 - 75% of those aware of FRDC would like to know more about what FRDC does and how its activities can help them.

- R&D News is read by 80% of all survey respondents and rated highly to the point where they would like to receive the publication directly themselves. Having said that, the opportunity exists to more effectively keep business operators informed on industry news and happenings. Refinements to the publication should be explored given the proportion claiming it needs to become a more ‘interesting read’...see chart below.
- 92% of all survey respondents claim to read industry magazines or journals relating to their business.



1.3 Implications and Recommended Actions

The key strategic implications resulting from the Stage 3 Stakeholder Telephone Survey are outlined below. We also highlight areas worthy of action or specific action by FRDC.

- ***FRDC needs to work at increasing unprompted recall of the organisation. This is viewed as essential ingredient in strengthening understanding of FRDC role, relevance and value.***
 - Maintaining and nurturing relationships with Industry groups and associations appears vital. Collectively, government departments and agencies are also key avenues for increasing awareness. The importance of existing FRDC communications and specific touch points cannot be underestimated.

- ***Opportunities for enhancing knowledge of FRDC's core aims and activities exist. Increased stakeholder knowledge is likely to reduce the impact of any negativity towards the organisation.***
 - Identified understanding of FRDC appears closely tied to the organisations core roles and responsibilities, but could be further strengthened. Understanding of FRDC's strategic role in prioritising and allocating research funds rather than just 'collecting and spending' needs to be developed.
- ***Greater consideration is needed on how best to engage with business operators across different sectors, particularly those outside the traditional networks and up the supply chain.***
 - Awareness of FRDC appears to decrease among businesses not involved with industry. Connecting with these sectors should be reviewed. Post harvest appraisal of FRDC is surprisingly strong, and a clear majority of the survey population believe improving ties with this part of the supply chain would be advantageous.
- ***Favourable rating of FRDC performance is promising and a solid benchmark result. Performance however, appears patchy across some sectors and requires attention.***
 - Strengthening overall satisfaction is likely to be driven by greater recognition of and respect for, the relevance and value of FRDC funded activities, along with perceived direct impact on individual business operations. Greater involvement in general projects and innovative low cost R&D options should be explored.
 - It is encouraging that FRDC is being credited with tangible benefits resulting from Fisheries R&D, demonstrating that many business operators are able to recognise the role FRDC plays in business development.
- ***While difficult to integrate within FRDC core role, consideration needs to be made on how to facilitate greater levels of marketing and market development.***
 - A number of grassroots operators (particularly small businesses) appear to feel helpless in the face of negative price movements. It seems difficult for many business operators to understand why marketing is not a responsibility of FRDC. Playing a support role in addressing this issue is seen as a high priority by stakeholders surveyed.

- *There is evidence that FRDC needs to improve communication of current R&D initiatives and work more closely with industry associations.*
 - The overall provision of more targeted and timely information should be considered in line with industry activity. Modifications to the R&D News should be further explored, including the use of a mailing list distribution system and industry related summaries.
- *An exciting opportunity exists to build better ties with business operators currently conducting their own R&D.*
 - FRDC should seek to learn about the processes used by those undertaking their own R&D and where the organisation can best assist in facilitating development.
- *FRDC is seen as a key partner in the future by business and industry.*
 - Sustainability concerns and uncertainty over the future of the industry means business operators are looking more than ever towards FRDC to be a strong leader. Ongoing contribution of R&D funds is not recognised as a problem for many operators, with FRDC clearly empowered to take the Australian Fisheries sector forward.
- *Realistic KPI targets should be set for FRDC for the coming the 12 months to measure against when the stakeholder survey is expected to be repeated.*
 - The following table highlights the KPI targets Ipsos recommends FRDC should consider implementing:

		Target
(Q1.) Proportion able to identify FRDC as the organisation responsible National Fisheries R&D (unprompted)	47%	55%
		75%
(Q11.) Proportion of respondents aware of FRDC who think the organisation play a significant role in direct benefits achieved through R&D*	60%	70%
		65%
(Q25 Statement 8) Proportion agreeing FRDC is spoken of highly by businesses or organisations I talk to*	49%	60%

**Proportion of respondents answering specific question, not reflective of total sample*

Reader Note: Q11. KPI has been amended from original report to reflect only those respondents aware of FRDC.





What is she going to say?



What is he going to hear?



What does she have in mind?

FRDC Stakeholder Groups Research

Stage 3: Stakeholder Telephone Survey

Final Report

Date: 24 August

Prepared for: FRDC

Ipsos Consultants: Jonathan Jenkin
George Katos

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Background

■ Aims of Research:

- Determine the needs, expectations, attitudes and understanding of stakeholders in relation to current FRDC activity and R&D priorities

■ Project Deliverables:

- Outcomes are expected to provide FRDC with clear direction on how best to refine operational and communication programs and activities

■ Research Stages:

- Stage 1: 20 personal depth interviews with key stakeholders
- Stage 2: R&D News evaluation survey based on 68 self-completion responses (*note: Stage 1 & 2 results are not covered in this report*)
- Stage 3: 201 telephone interviews with FRDC stakeholders
 - Cross-section of grassroots operators, post-harvest businesses and the recreational fishing industry groups...snapshot of current perceptions, awareness and attitudes
 - Average survey length: 20 minutes
 - Survey conducted 2 to 27 June 2005
 - Respondents sourced from industry associations, FRDC and other industry contacts
 - Survey to be used as a framework for future stakeholder surveys and aid in the establishment of organisational performance benchmarks (KPI's)

IMPORTANT READER NOTE:
Survey results presented are
indicative of the perceptions and
opinions of the broader fisheries
sector...sample sizes are too small to
accurately report on the extent of
differences across stakeholder types.



Telephone Survey Respondents

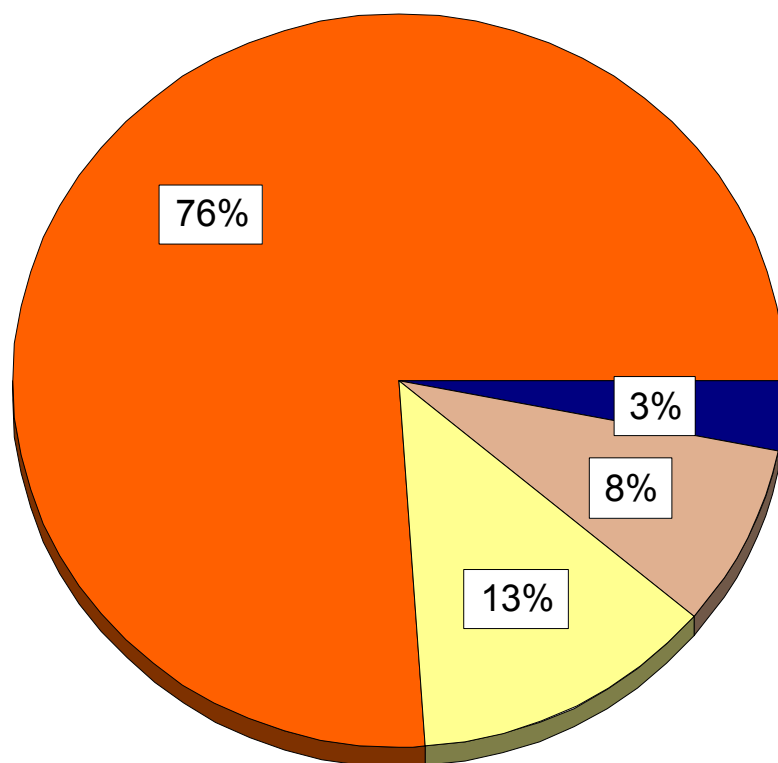
Respondent Type	Number Interviewed	% Sample Interviewed*
Australian Prawn Farmers	11	42%
Atlantic Salmon	7	88%
Barramundi (Aquaculture)	5	17%
East Coast Prawn Fisheries	10	26%
Northern Prawn Fishery	5	56%
Pacific Oysters	14	67%
Pearls	9	60%
Post-Harvest	26	55%
Recreational Fishing	16	89%
Rock Lobster	24	83%
Southern Bluefin Tuna	5	42%
South East Trawl Fisheries	13	59%
Sydney Rock Oyster Farmers	18	56%
Wild Catch Abalone	32	91%
Other	6	55%
TOTAL	201	49%





* Include numbers found to be inactive/ out of service

- 'Recreational Fishing' respondents included peak body representatives only
- 'Post Harvest' respondent types included:
 - Retailers (n=8)
 - Wholesalers (n=7)
 - Processors (n=5)
 - Exporters (n=2)
 - Restaurant Mangers (n=2)
 - Importer (n=1)
 - Agents (n=1)
- 'Other' respondent types included miscellaneous business operators (e.g. Mussels)

Profile of Respondents

Stakeholder Type



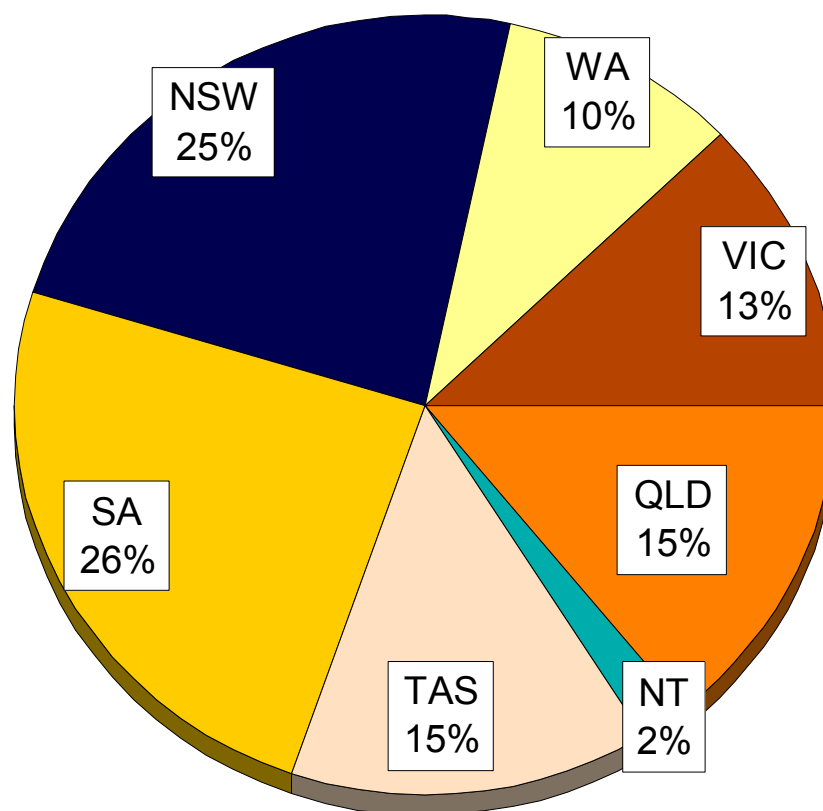
	Respondents
 Grassroots	153
 Post Harvest	26
 Rec Fishing	16
 Other	6

S2.

N=201 (all respondents)

Profile of Respondents

State Location

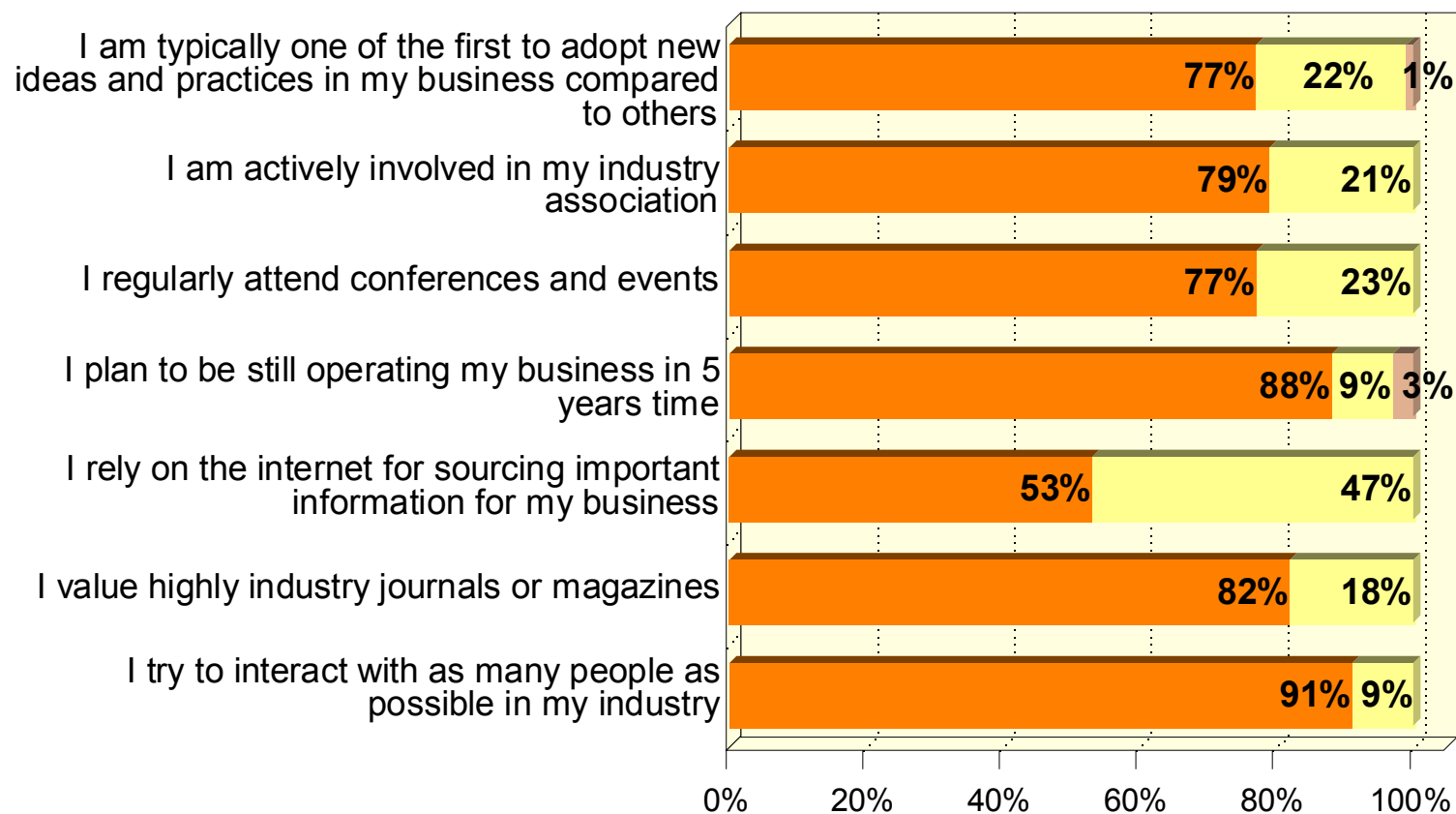


S1.

N=201 (all respondents)

Profile of Respondents

Which of the Following Describes You?



Q26.

N=201 (all respondents)



Yes



No



Don't Know

Profile of Respondents

■ Respondent classifications reported on:

- *Wild catch/ Aquaculture Businesses (Grassroots respondents only)*
 - Wild catch (n=84)
 - Northern Prawn Fishery, Wild catch Abalone, Rock Lobster, East Coast Prawn Fisheries, South East Trawl Fisheries
 - Aquaculture (n=69)
 - Australian Prawn Farmers, Southern Bluefin Tuna, Atlantic Salmon, Pearls, Pacific Oysters, Sydney Rock Oysters, Barramundi
- *Number of Full-time Staff (Grassroots respondents only)*
 - Up to 2 staff (n=38)
 - 3 to 6 staff (n=35)
 - 7+ staff (n=46)
- *Age Group (all respondents*)*
 - Up to 40 (n=56)
 - 41-50 (n=75)
 - 51+ (n=69)

**Note: Refusals n=1*



Major Highlights



Major Highlights

- Overall awareness of FRDC is high and mostly attributed to industry association sources and government departments to some degree.
- Claimed understanding of FRDC's core role is strong, mostly tied to allocation of funding and to a lesser degree, managing issues affecting the future direction of the industry.
- FRDC's overall performance is rated highly by a majority of stakeholders surveyed, praising the level of funding available and actual focus and strategy of FRDC facilitated research...it is worth noting that ratings vary somewhat across industry segments.
- Strengthening overall satisfaction is likely to be driven by greater recognition of, and respect for the relevance and value of FRDC funded activities, plus how they impact positively on individual business operators.
- Perceived benefits from Fisheries R&D overall is moderate, with many recognising the role of FRDC in achieving these benefits. Direct benefits linked to species and breeding related research appear to stand out.

Major Highlights

- Perceived deficiencies in Fisheries R&D have been identified and focus on the need for more product marketing, market development and dissemination of market intelligence information.
- Industry association publications (newsletters/magazines) are clearly identified as a highly favoured medium for learning more about business related issues.
- R&D News is rated highly, but not many read the publication thoroughly. One in two survey respondents feel it needs to become a 'more interesting read'.
- A high number of business operators are conducting their own R&D, with many sourcing funding from research investors other than FRDC...partly citing difficulties in obtaining funding from FRDC.
- Stakeholder attitudes reflect concerns over the future sustainability of the fisheries sector and as such, on-going R&D into the Australian fisheries sector is highly valued and well supported by grassroots contributions.
- A strong desire to learn more about FRDC and its activities has been expressed, with a considerable proportion seeking greater interaction and knowledge on how FRDC can assist them at an individual business level.



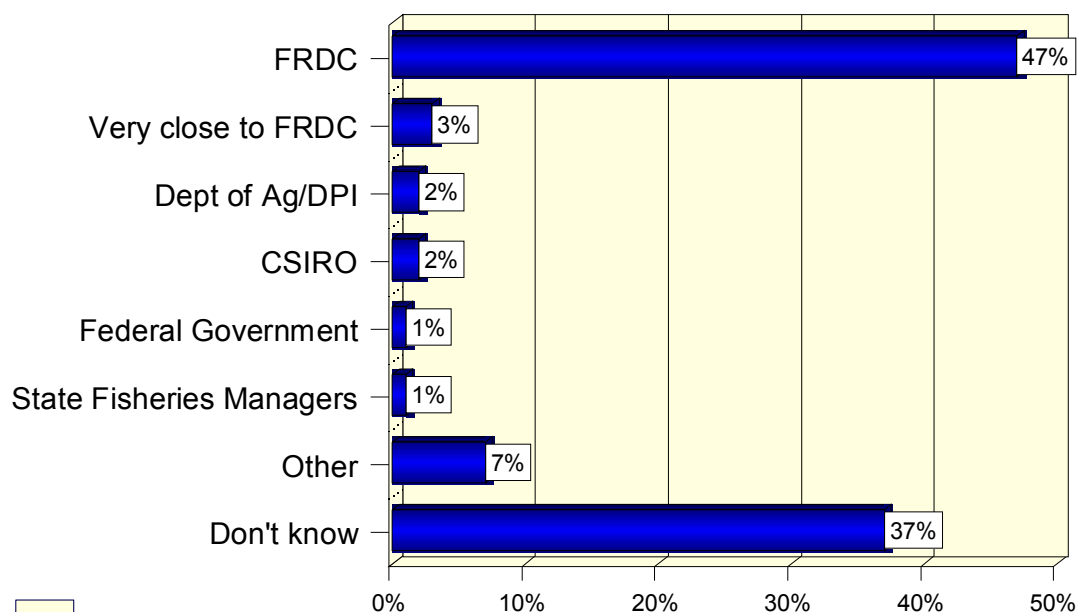
Key Insights



General Awareness of FRDC

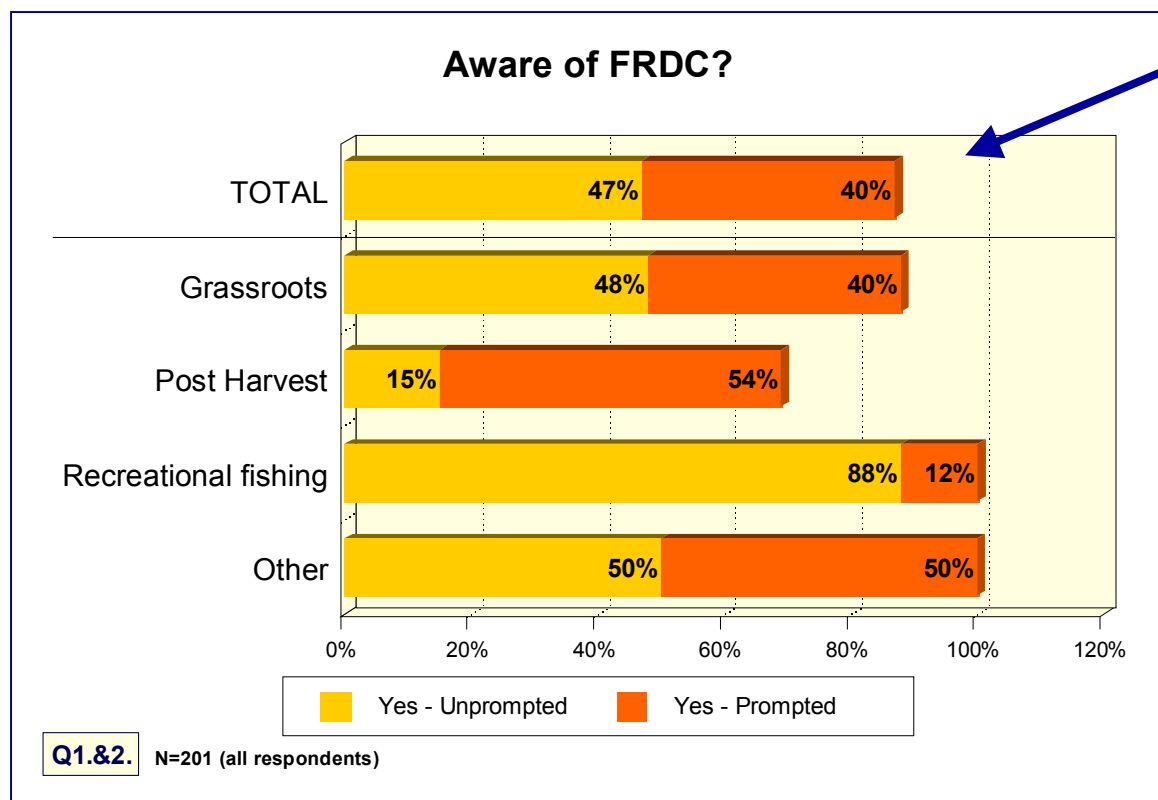
Unprompted Awareness of FRDC

What is the Name of the Organisation Responsible for National Fisheries R&D?



- Nearly half of those surveyed could identify FRDC unprompted (47%)
- More than one third could not identify any organisation responsible for Fisheries R&D (37%)
- FRDC is typically better known by those involved in industry associations
- Similar recognition of FRDC noted among Aquaculture and Wild-catch grassroots operators

Overall Awareness of FRDC



- A further 40% claim to recognise FRDC once prompted
- Total awareness rate is a high 87% of survey respondents
- Higher awareness is noted amongst respondents who:
 - Are generally concerned with the outlook of the sector
 - Consider themselves to be early adopters of new ideas
- Lower awareness noted among Post Harvest respondents

Source of Awareness with FRDC

- **A majority of respondents are aware of FRDC because of industry associations and their newsletters and publications (see chart p19.)**
 - Examples Industry associations (other than generic references) include:
 - Recreational Fishing Club(s)
 - National Aquaculture Council
 - Australian Barramundi Farmers Association
 - State Abalone Association
 - WA Fishing Industry Council
 - Oyster Farmers Association
 - Australian Prawn Farmers Association
 - National Tuna Boat Owners Association
 - The Rock Lobster Committee (of Sarlac)
 - Pearl Producers Association
 - Government Departments (including State Fisheries) play an important role in publicising FRDC
 - Direct contact with FRDC cited as an important source of awareness when mentioning FRDC specific initiatives

Source of Awareness with FRDC

Source of Awareness of FRDC and Its Activities? (Unprompted)



Q5. N=168 "Other mentions" not shown (18%)

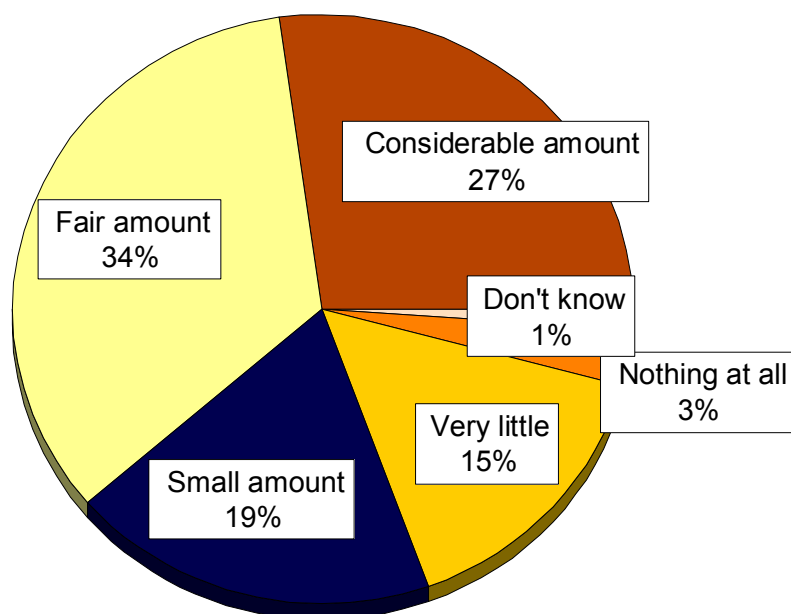
Note: Respondents saying "don't know" or "nothing at all" have been excluded N =7



Knowledge and Understanding of FRDC

Knowledge of FRDC

How Much Would You Say You Know About What FRDC Does?

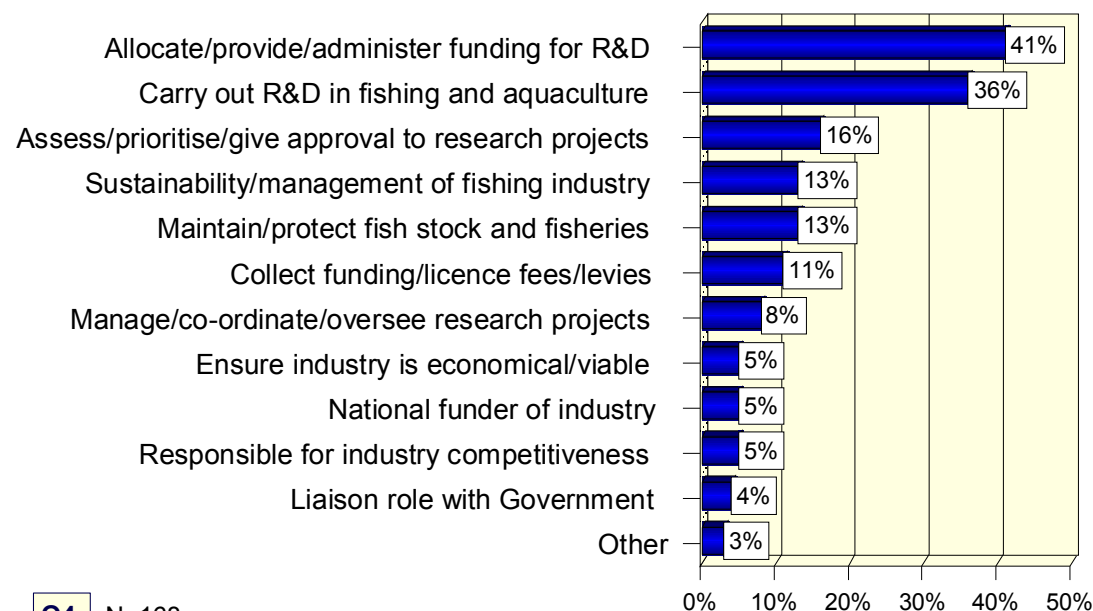


Q3. N=175

- This question was only asked to respondents aware of FRDC (either unprompted or prompted)
- 61% of respondents claim to know considerable or fair amount about what FRDC does...more so among larger resourced businesses (7+ staff)
- Lower awareness is noted among those not involved with industry associations

Understanding of FRDC's Role and Responsibilities

What is Your Understanding of FRDC's Role and Responsibilities? (Unprompted)



Q4. N=168

- A mixture of strategic and operational responsibilities mentioned by respondents
- Also mentions of FRDC's role in managing high profile issues including:
 - Sustainability
 - Protecting fish stocks
 - Economic viability
 - Industry competitiveness

Note: Respondents saying "don't know" or "nothing at all" have been excluded N = 7



Understanding of FRDC's Role and Responsibilities

Examples of Verbatim Comments:

“Providing overall direction for the industry in terms of research and development.”

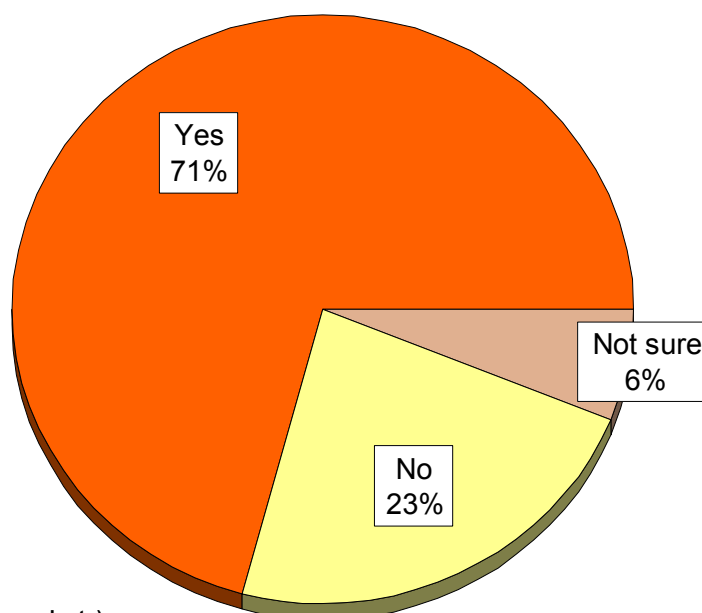
“To ensure that the fishing industry is managed properly....look at sustaining viable production for the future.”

“They play a major role...they liaise or discuss with the parties concerned to get the best outcome for the dollar.”

“They undertake research into all matters to do with marine fisheries and the environment on a national level.”

Knowledge of Levy Contribution

Do You Contribute Financially Towards Fisheries R&D Activities?

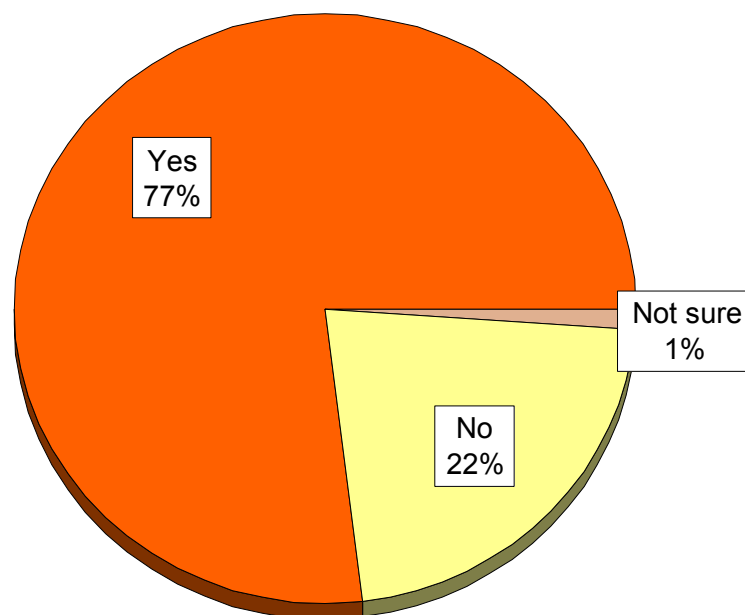


Q8. N=201 (all respondents)

- 71% of all respondents understand that they contribute financially towards Fisheries R&D in Australia
- Higher awareness noted among large businesses and those involved in industry associations
- Low awareness evident among respondents based in Victoria

Knowledge of Levy Contribution

Aware that Your Funding Contribution Assists in Funding R&D Investments Made by FRDC?



Q9. N=142

Note: This question was asked of 71% of all respondents

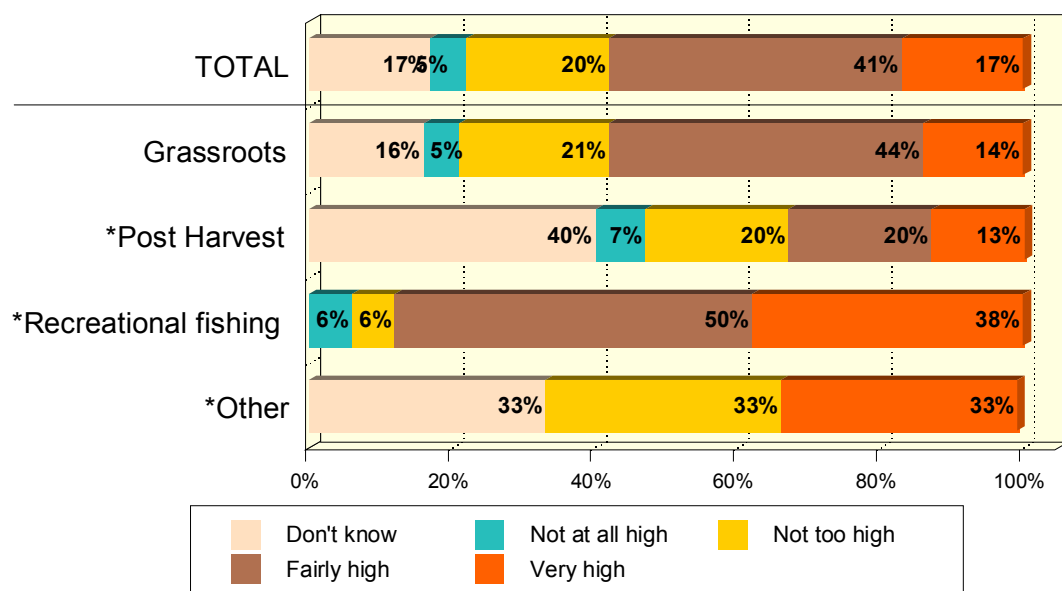
- This question was only asked of those aware that they contribute financially towards fisheries R&D activities
- Higher awareness is evident amongst:
 - Respondents involved in large businesses (7+ staff) (91%)
 - Aquaculture grassroots operators (83%)
 - Those involved in industry associations (80%)



Rating of FRDC Performance

Rating of FRDC Performance

How Would You Rate the Performance of FRDC as Investors in Fisheries R&D?



Q6. N=168
*Indicative results due to small sample sizes

■ This question was only asked to survey respondents aware of FRDC (either unprompted or prompted)

■ A majority (58%) rated highly FRDC's performance as investors in fisheries R&D and highest among:

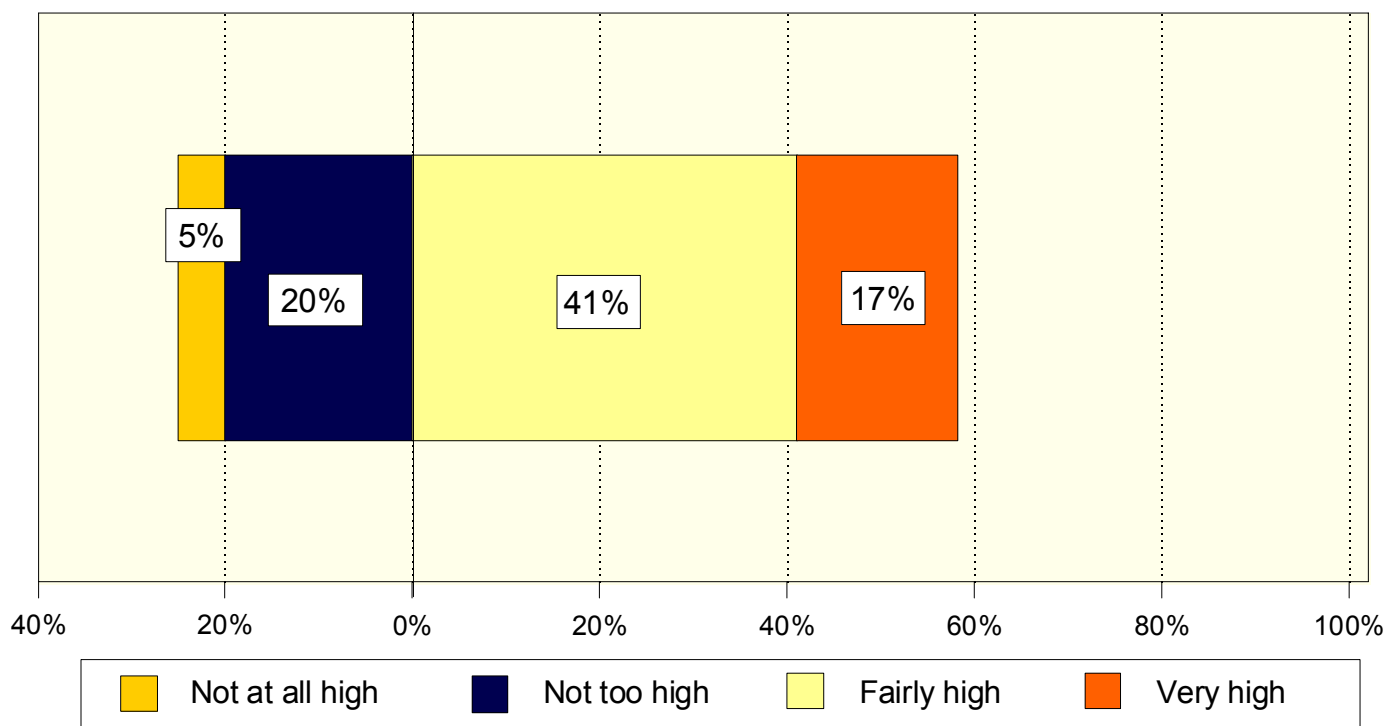
- WA respondents
- Large businesses (7+ staff)
- Recreational Fishing respondents

■ Similar rating noted among Aquaculture (62%) and Wild-catch (55%) grassroots operators

Note: This question only asked to those aware of FRDC

Rating of FRDC Performance

How Would You Rate the Performance of FRDC as Investors in Fisheries R&D?

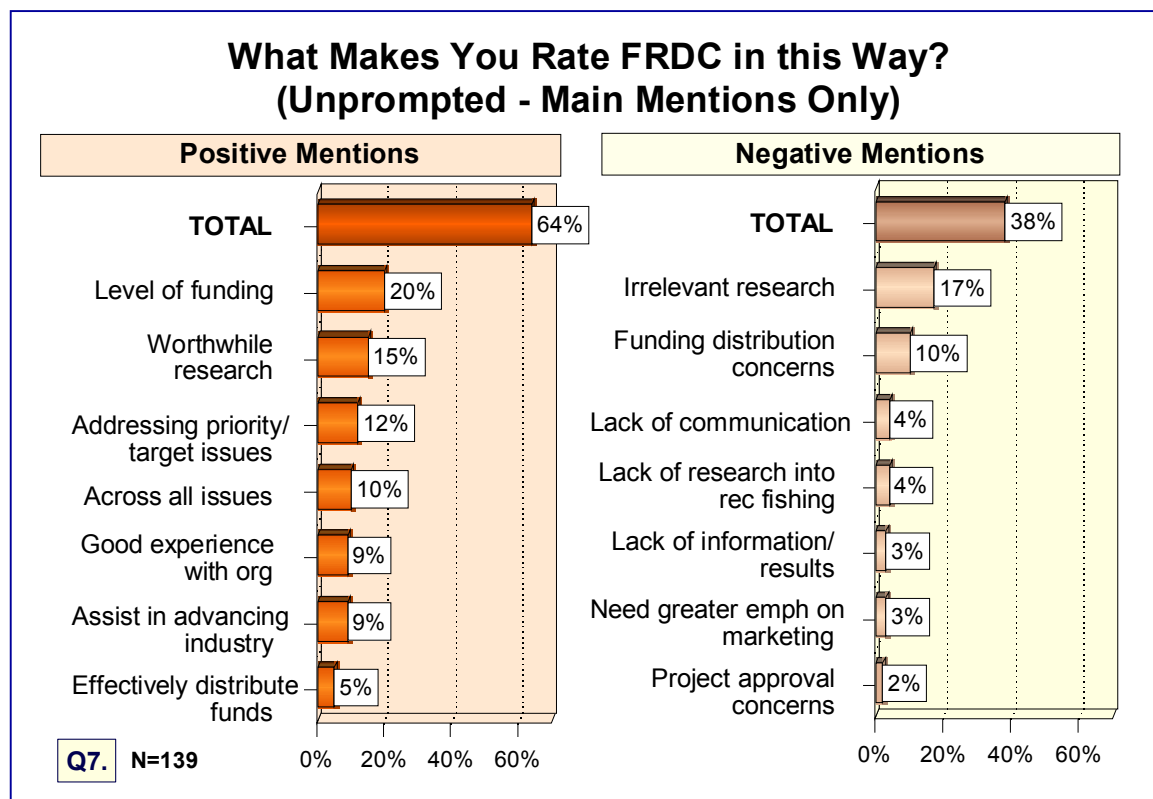


Q6.

N=168

Can't say/Don't know not included (17%)

Rating of FRDC Performance



- Opposing views on the quantity and value of FRDC R&D in positive and negative reasons for rating
- Many positive comments about FRDC's strategic role (e.g. prioritising, targeting, and covering issues)
- A number of negative comments referring to lack of communication and information by FRDC

Note: Respondents could have mentioned more than one positive and/or negative mention

Rating of FRDC Performance

Examples of POSITIVE Verbatim Comments:

“They seem to be actively involved in major projects effecting my area of fishing.”

“From the feedback that we get, for what they are putting their money into and the results they get, they spread themselves pretty well.”

“I think the research that they have invested in is very worthwhile and results coming out of it are very useful.”

“They do a few research projects for the prawn farmers and seem to have pretty good results.”

Rating of FRDC Performance

Examples of NEGATIVE Verbatim Comments:

“I feel that they spend too much money on the wrong sort of projects, there is a little too much emphasis put on conservation, and naming fish...there should be more emphasis on marketing and finding where to sell the products that fisherman do catch.”

“I don’t understand what they do and all the money they spend.”

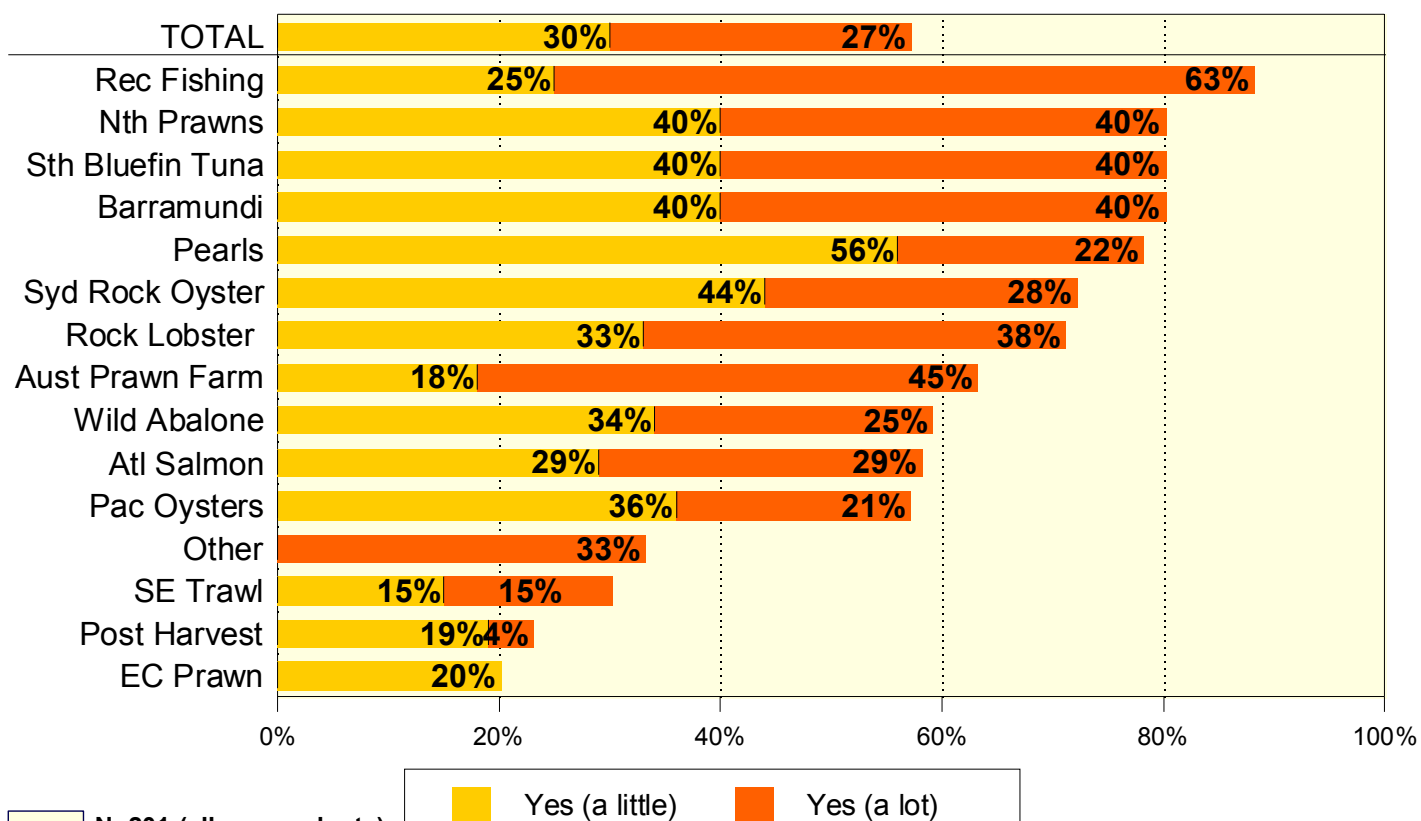
“They don’t seem to have much to do with our industry (South East Trawl), their activity seems to be in other areas.”



Perceived Benefits from Fisheries R&D

Perceived Benefits from Fisheries R&D

Benefited from Fisheries R&D in Past 5 Years?

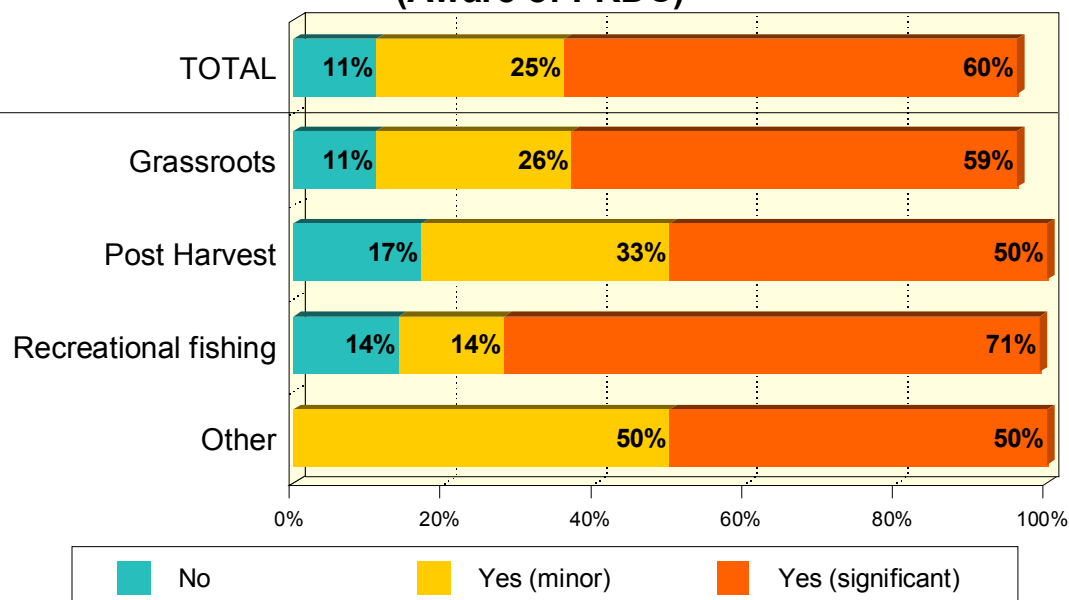


Q10. N=201 (all respondents)

Note: category results indicative due to small sample sizes

Perceived Benefits from Fisheries R&D

Did FRDC Play Role in Achieving Direct Benefits? (Aware of FRDC)



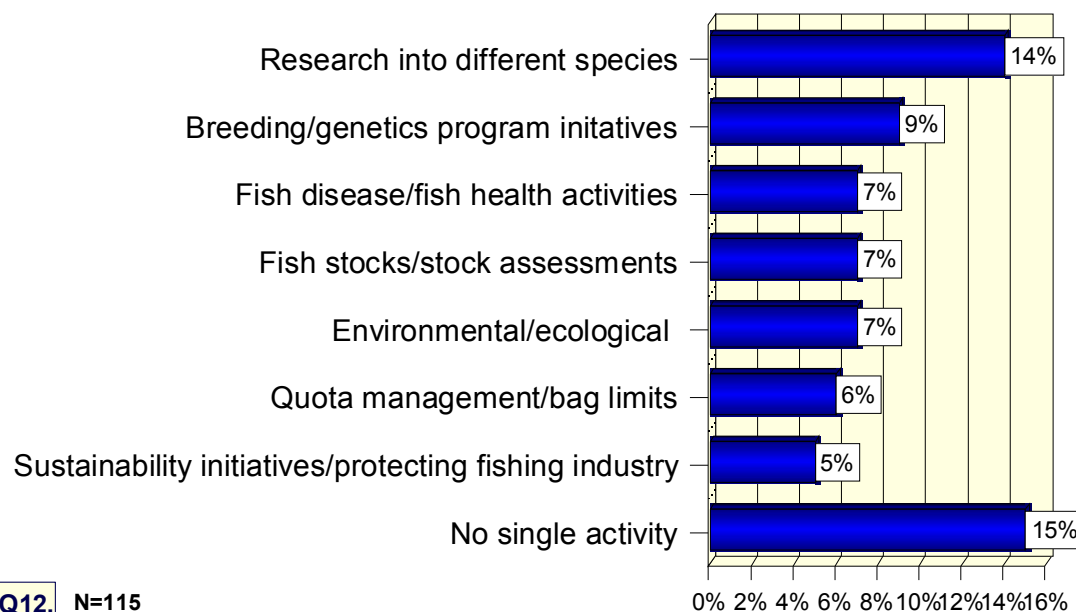
Q11. N=107
"Not sure" not shown

*Note: Responses shown are those 'aware' of FRDC.
Results represent 53% of all respondents.*

- This question was only asked of respondents aware of FRDC who believe they have directly benefited from fisheries R&D in the past 5 years
- FRDC role strongly recognised by:
 - Rec Fishing respondents
 - Aust Prawn Farmers
 - TAS and QLD respondents
- Similar 'significant' role noted among Aquaculture (60%) and Wild-catch (57%) grassroots operators

Perceived Benefits from Fisheries R&D

Most Significant Activity or Initiative You Have Directly Benefited From as a Result of Fisheries R&D? (Unprompted - Main Mentions Only)



■ Respondents asked this question claim to have generally benefited from:

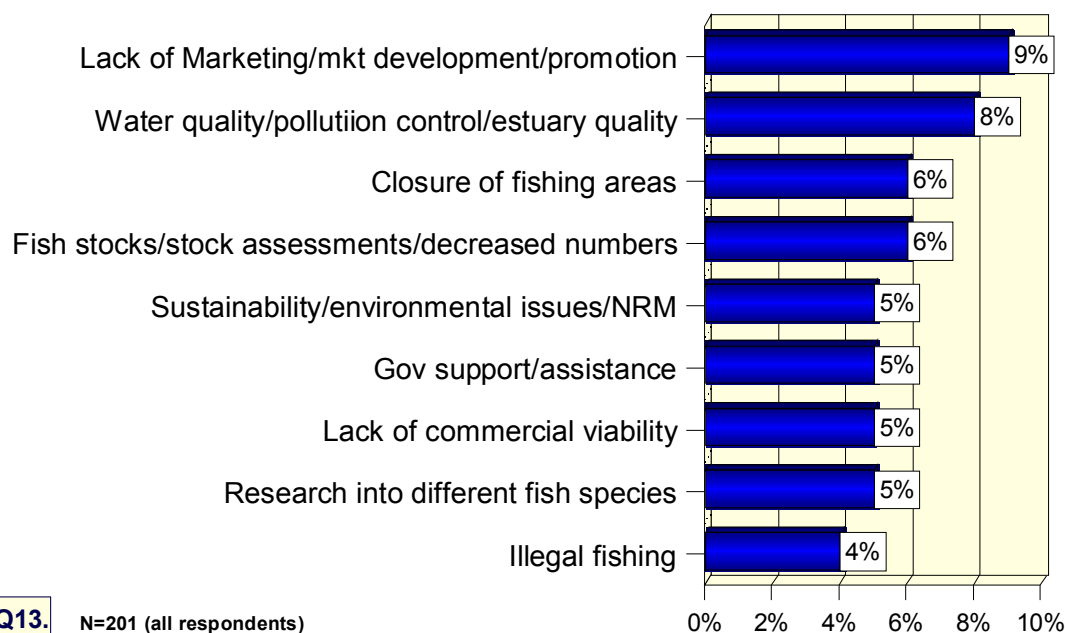
- Research into different species (14%)
- Funding/ grant initiatives/funded project (10%)
- Breeding/genetics programs (9%)

■ Other mentions included:

- *hatchery stock*
- *growth improvement*
- *prawn domestication program*
- *released fish survival project*
- *fish tagging and habitat mapping*

Perceived Gaps in Fisheries R&D

What One Issue Has Been Ignored or Given Inadequate Attention or Funding? (Unprompted - Main Mentions Only)



- Emphasis on marketing, particularly by:
 - Those concerned with the outlook of the sector
 - Early adopters of new ideas
- Emphasis on water quality issues by Aquaculture respondents
- Other mentions included:
 - *illegal fishing*
 - *imported seafood*
 - *aquaculture/fish farming*
 - *industry unity*
 - *fisheries mgmt and commercial netting*

Perceived Gaps in Fisheries R&D

Example Marketing Related Verbatim Comments (Q13 and Q14):

“Our pricing and marketing (needs attention). We just don’t seem to have anyone out there to help us...we’re going through a bit of a low spot... not that the fishermen are not good at marketing, they just have no control over marketing or pricing and nobody making an effort to help us market our product.”

“Abalone market information...mainly to do with prices and markets in South East Asia.”

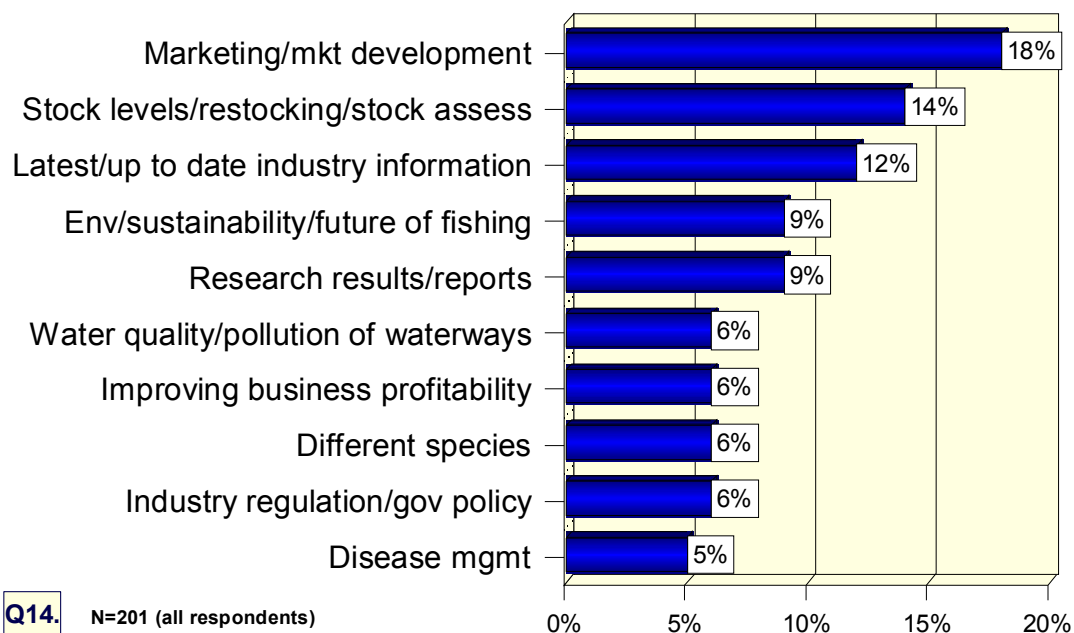
“Market trends....what the market is doing as far as sales is concerned...prices and consumer awareness.”



Information and Communications

Information or Advice Most Valued

What Type of Information or Advice Do You Seek or Value Most? (Unprompted - Main Mentions Only)



■ Marketing/ market development/ trends/ exporting/ promotion information most commonly valued (18%)

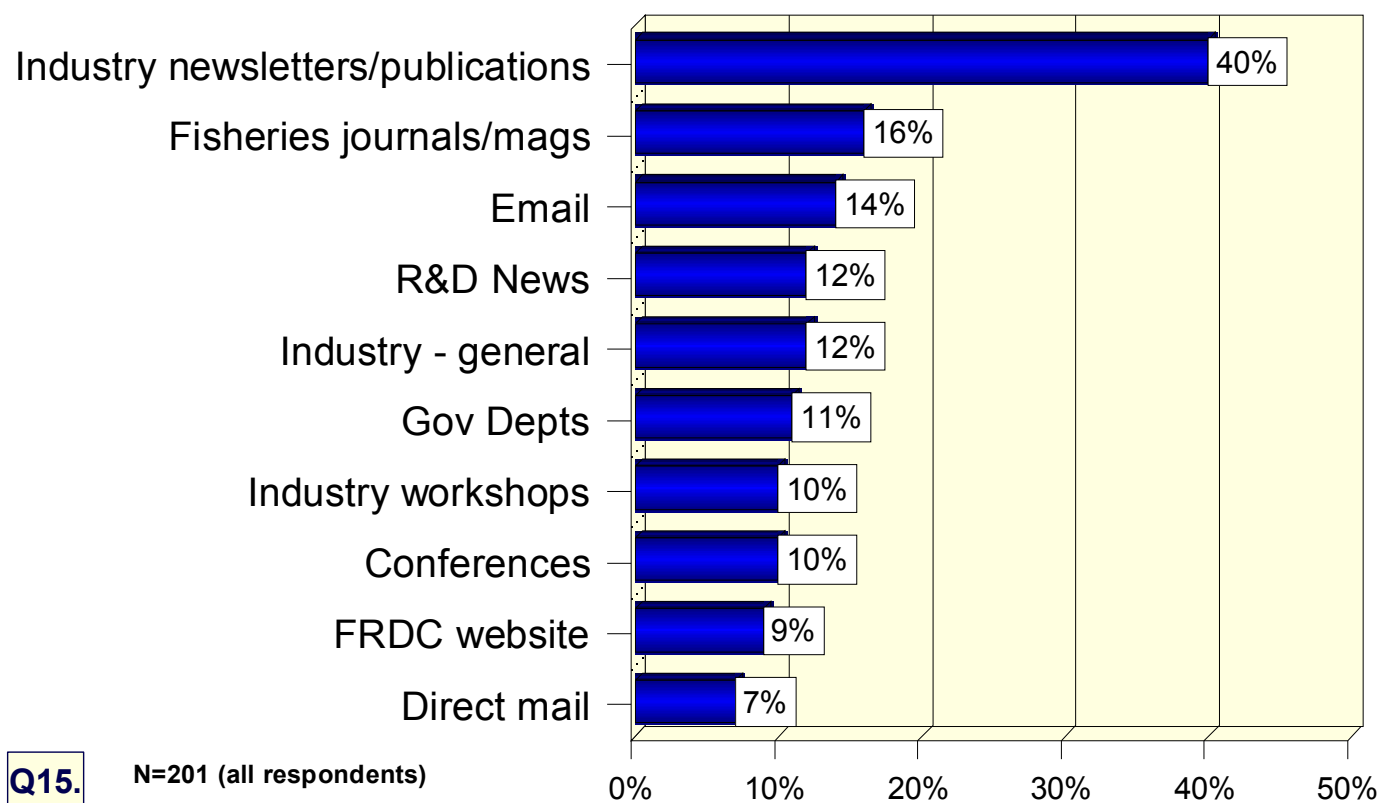
- Greater mentions by small organisations (up to 2 staff) (27%)

■ Information on stock levels (14%) and up to date/ latest/ industry information (12%) also considered of high value

■ Most respondents prefer to receive information via industry newsletters/publications (see chart p40.)

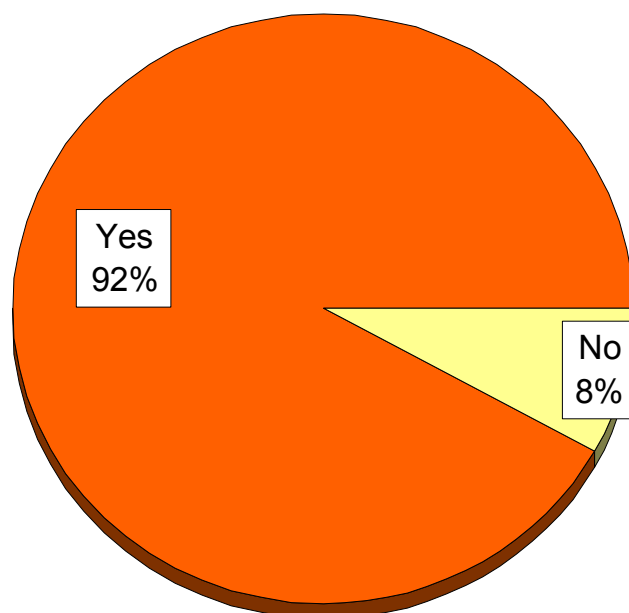
Preferred Communication Sources

Sources Prefer to Receive Information About New Technology or Practices? (Main Mentions Only)



Readership of Industry Magazines and Journals

Do You Read Any Magazines or Journals Relating to Your Business?



Q16.

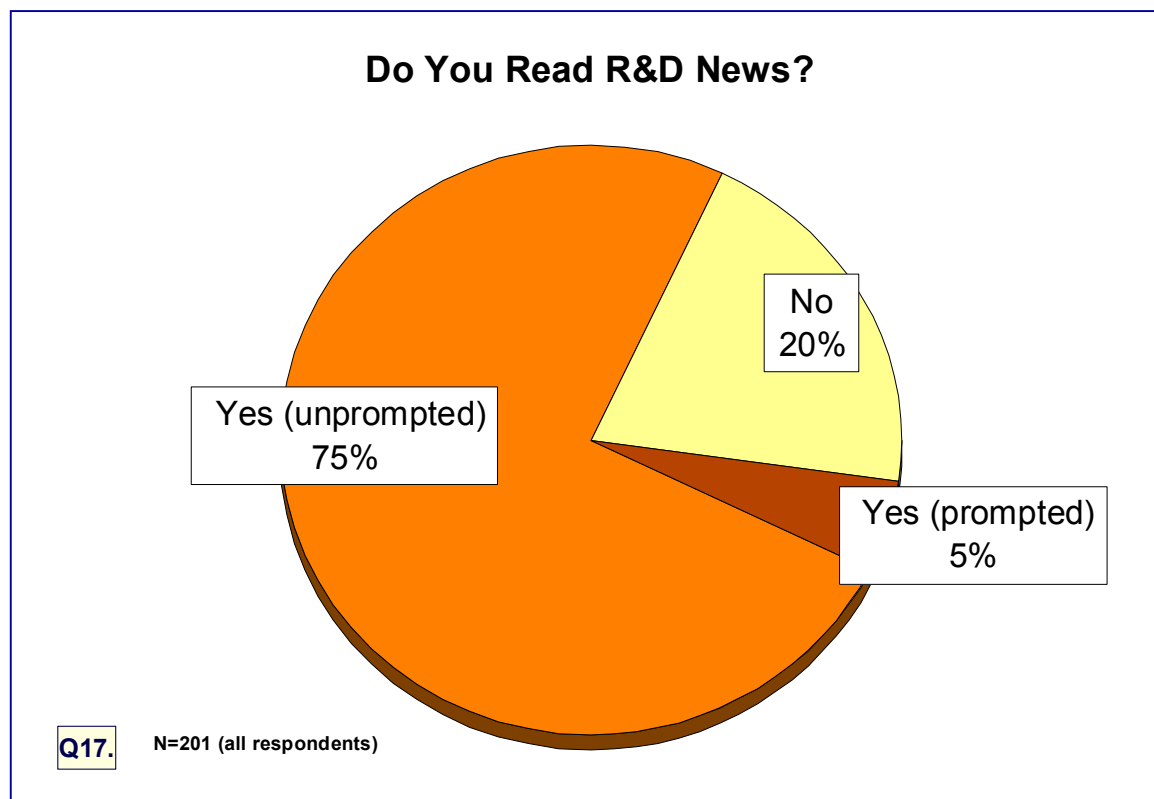
N=201 (all respondents)

- A very high proportion (92%) claim to read magazines/ journals relating to their business
- Lower proportion reading magazines noted amongst:
 - Those not involved with industry associations (84%)
 - Post-harvest respondents (82%)



R&D News Appraisal

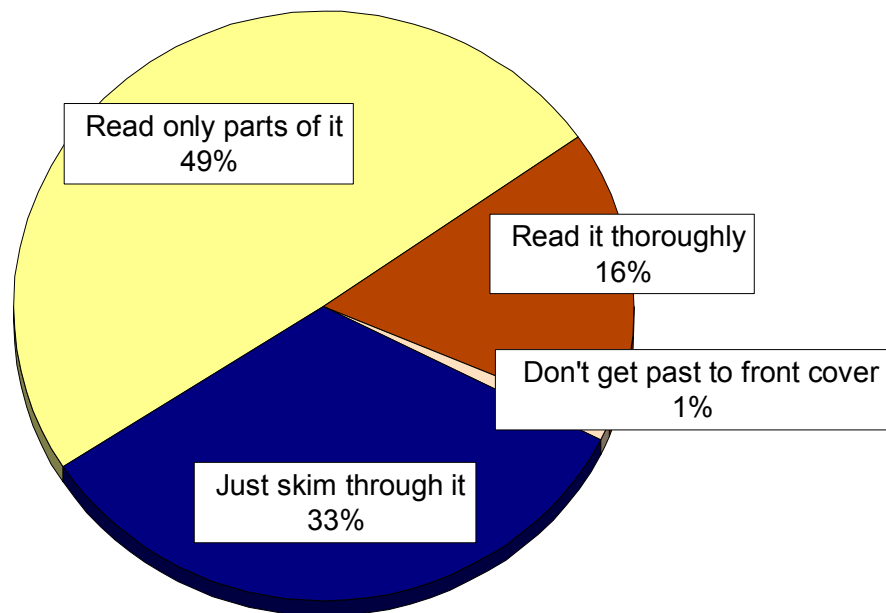
Readership of R&D News



- Note: question prompt informed respondents that “R&D News was the publication inserted into fishing magazines/journals”
- Most respondents (80%) state they read the R&D News publication
- This was particularly evident among those :
 - Who operate within large businesses (7+ staff) (90%)
 - Involved in industry associations (87%)

Readership of R&D News

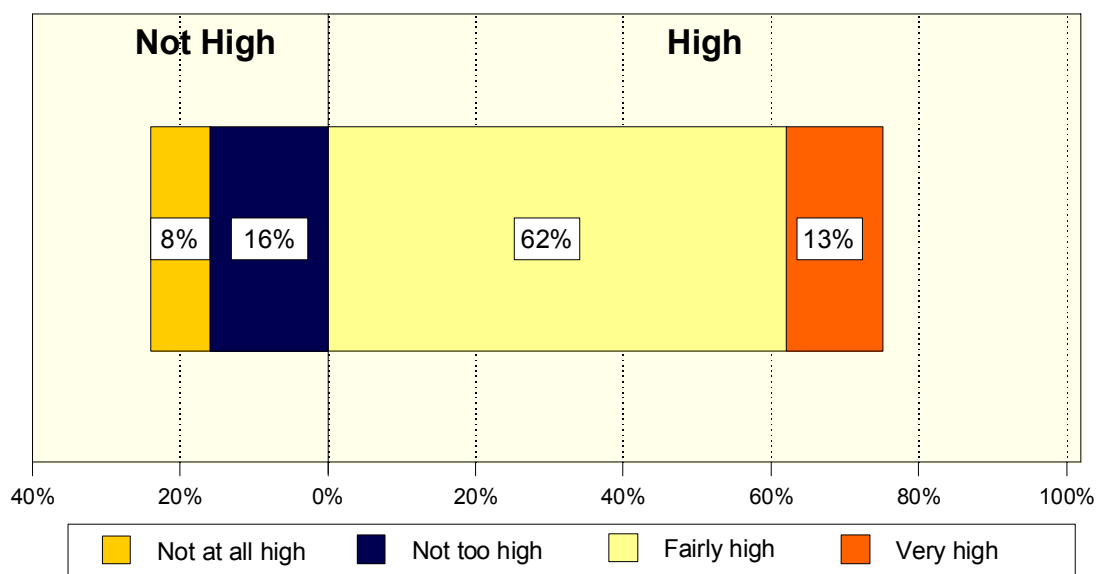
Which of The Following Best Describes Your Readership of R&D News?



- This question was asked only to respondents aware of R&D News
- Only a small proportion claim to read R&D News thoroughly (16%)
- Younger respondents (aged up to 40) appear more inclined to only read parts of R&D News (63%)

Rating of R&D News

How Do You Rate R&D News as a Publication for Delivering R&D Based Information?



Q19. N=160
Can't say/Don't know not included (3%)

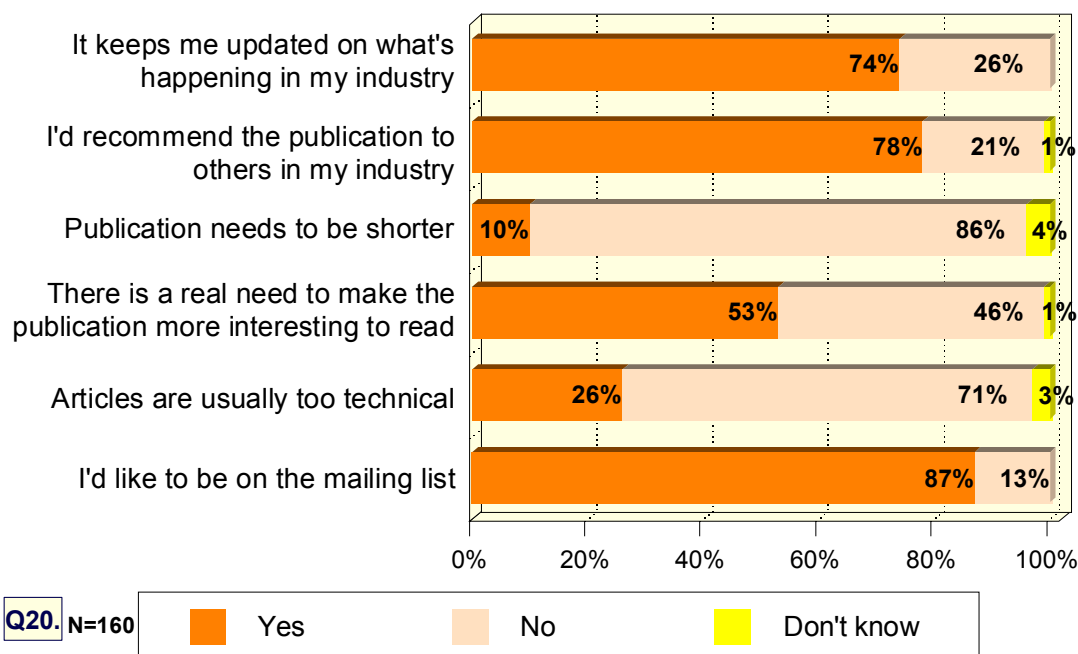
■ 75% of respondents asked to rate R&D News as a publication for delivering R&D information rated it highly...a good result!

■ High rating more evident among:

- Rec Fishing
- Pacific Oyster
- Pearl
- Atlantic Salmon

Rating of R&D News

R&D News Appraisal



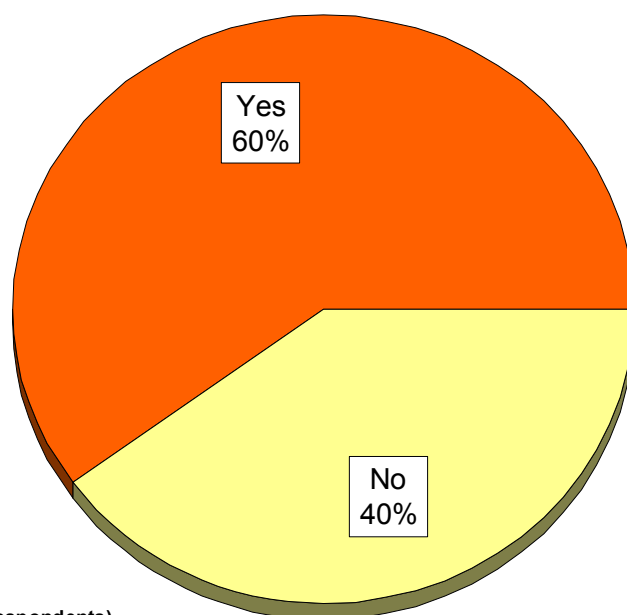
- Most respondents would recommend R&D News to others and also believe that it keeps them up to date on industry happenings
- Many respondents are satisfied with the length, while a quarter appear to struggle with the technical detail
- A high proportion see a need to make the publication more interesting to read
- Majority of question respondents would like to be on a mailing list



Conduct of Own R&D

Conduct of Own R&D

Does Your Business Conduct Any of its Own R&D?

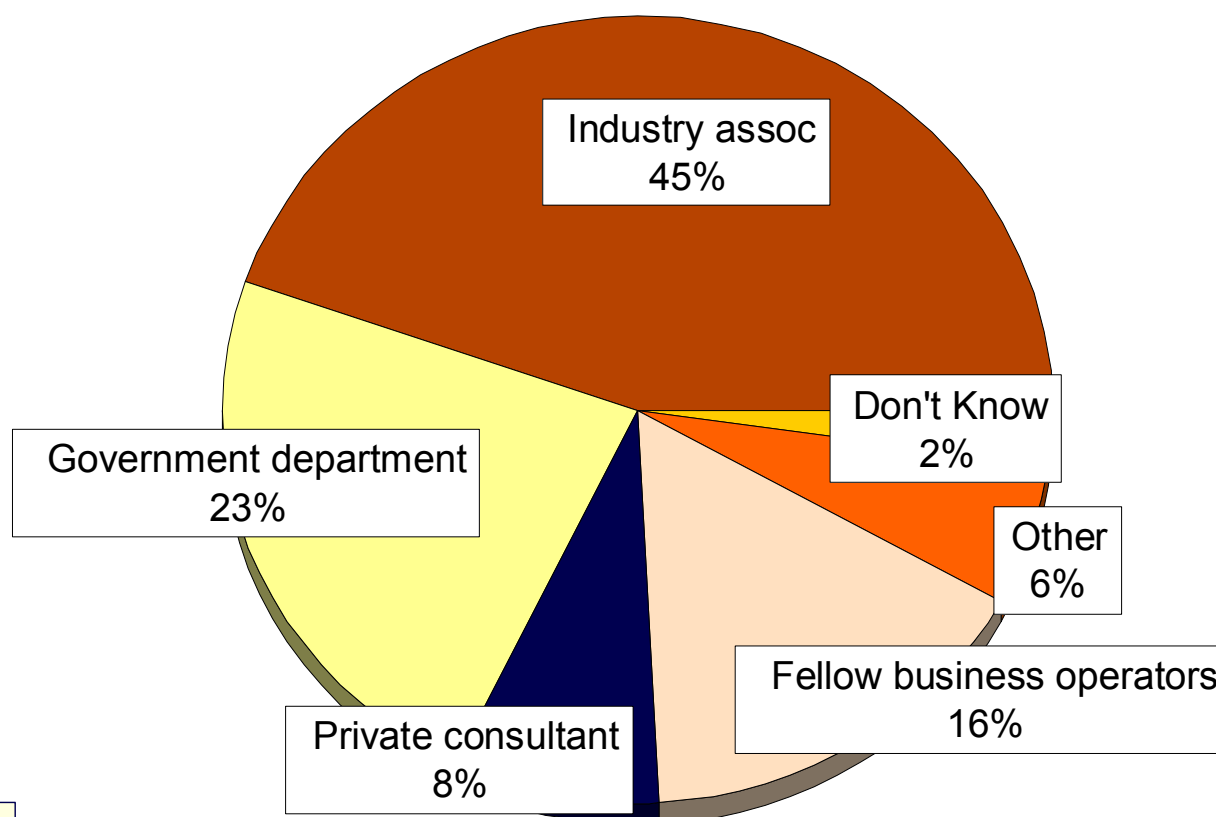


Q22. N=201 (all respondents)

- 60% of respondents conduct their own R&D
- High levels of own R&D evident among:
 - Large businesses (7+ staff) (81%)
 - Those up to 40 age group (70%)
 - Wild Catch Abalone (75%)
 - South East Trawl (67%)
- Most respondents would contact industry associations if looking to conduct R&D (see chart p49.)

Conduct of Own R&D

Who Would You Contact for Information and Advice if You Were Looking to Conduct R&D?

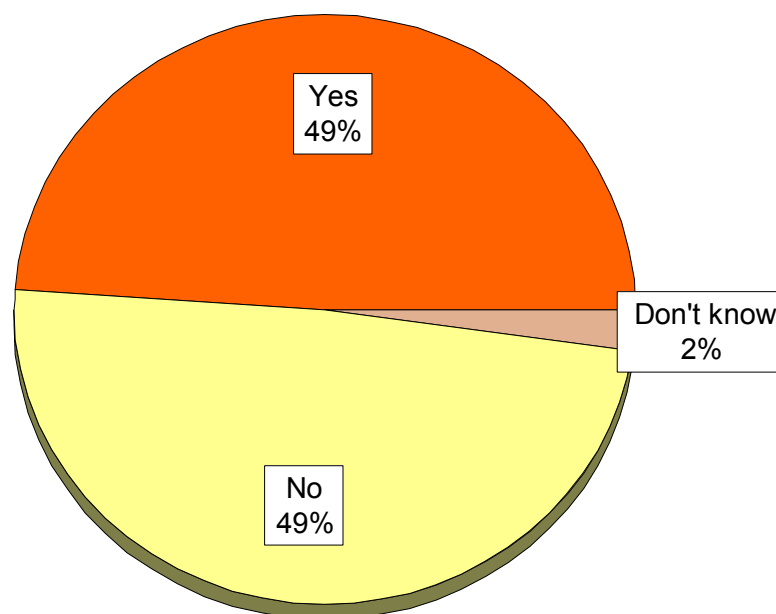


Q21.

N=201 (all respondents)

Conduct of Own R&D

Have You Ever Sourced Any Funding or Financial Assistance to Conduct R&D?



Q23. N=121

- Sourced funding/ financial assistance highest amongst:
 - Large businesses (7+ staff) (81%)
 - Atlantic Salmon (83%)
 - Wild Catch Abalone (67%)
 - Pacific Oysters (56%)

Conduct of Own R&D - Funding Sources

Organisation	Mentions
Aus Industry	9
State Government (general)	8
FRDC	7
Universities (Syd, Canberra, Sth Cross)	6
DPI (Qld and NSW)	6
SARDI	5
Federal Government	5
NHT	4
AFMA	3
Tasmania Oyster Research Council	3
DAFF	2
Self Funded	2
Abalone Growers Assoc	2
CSIRO	2
CRC	2

- A large number of organisations mentioned multiple times as funding sources for R&D (see left)
- High mention of State and federal government funding sources
- Single mentions as funding sources include:
 - Sarlac
 - SA Abalone Divers Assoc
 - Dept Env and Heritage



Attitudes & Mindset

Attitudinal Statements

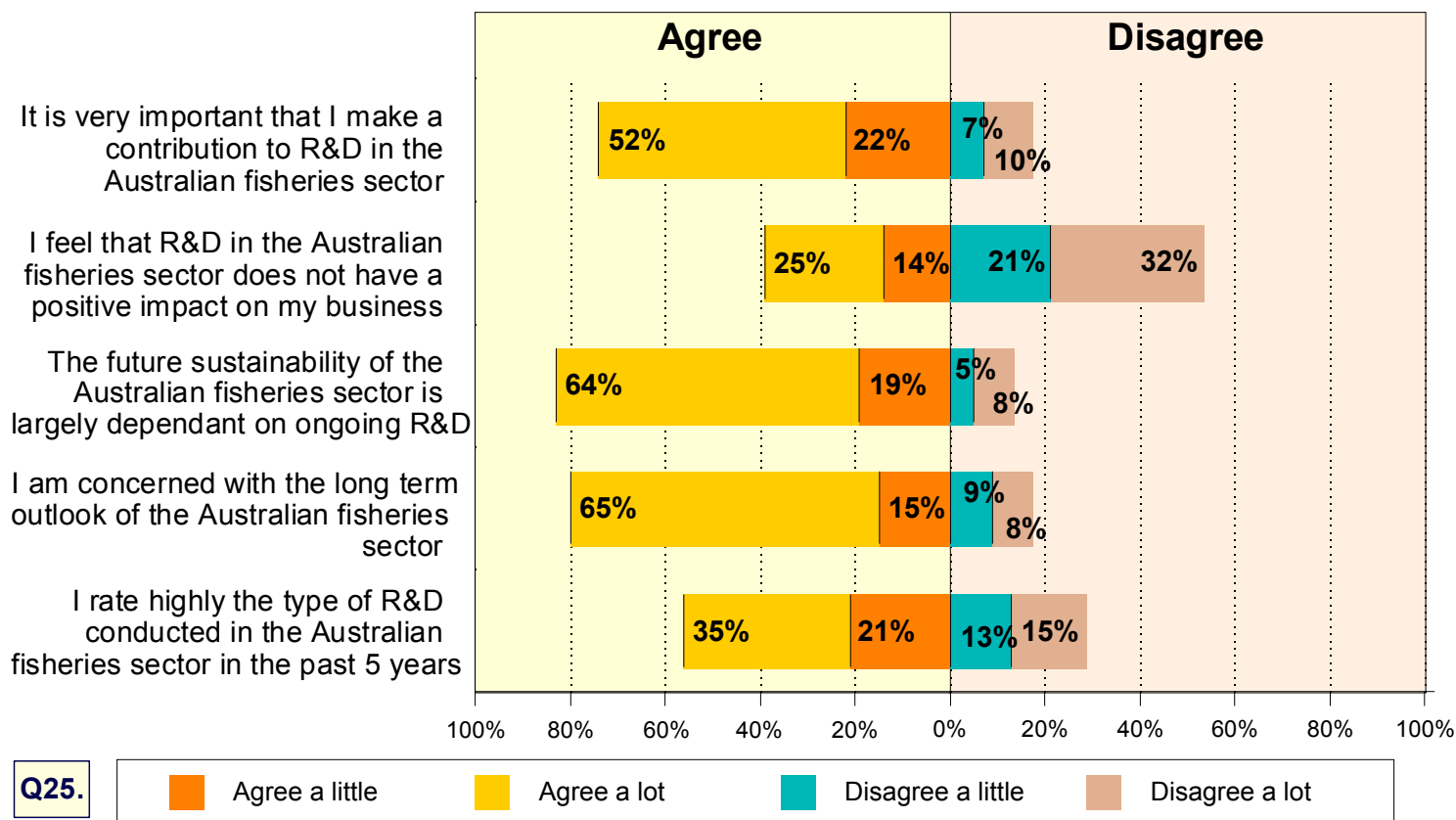
- **Respondent attitudes reflect concerns over the future sustainability of the fisheries sector. Ongoing R&D, supported by grassroots contribution is identified as very important**
 - A high proportion are concerned with the long term outlook of the Australian fisheries sector, with most agreeing that the sustainability of the Australian fisheries sector is largely dependent on ongoing R&D (83%) (see chart p55.)
 - Similarly, a strong majority of respondents believe that it is important to make a contribution to R&D in the Australian fisheries sector (74%)
 - Obtaining R&D funding is recognised as difficult by a number of respondents (59%) (see chart p56.)

Attitudinal Statements

- **A number of respondents question FRDC's grassroots impact and want it to improve contact with stakeholders up the supply chain**
 - Over half the respondents rate highly Australian Fisheries R&D conducted in the last 5 years (56%). A similar proportion view Fisheries R&D as having a positive impact on their business (see chart p55.)
 - Most respondents (aware of FRDC) believe it is important that FRDC interact more with stakeholders throughout the whole fisheries supply chain (93%) (see chart p56.)
- **Opinion and awareness of the FRDC is limited, but many respondents express a desire to learn more**
 - 59% of respondents (aware of FRDC) believe that FRDC is spoken of highly in their current business circles
 - Most respondents (aware of FRDC) would like to know more about what FRDC does and how its activities can help (75%)

Attitudinal Statements

Do You Agree or Disagree With the Following? (First 5 Statements)

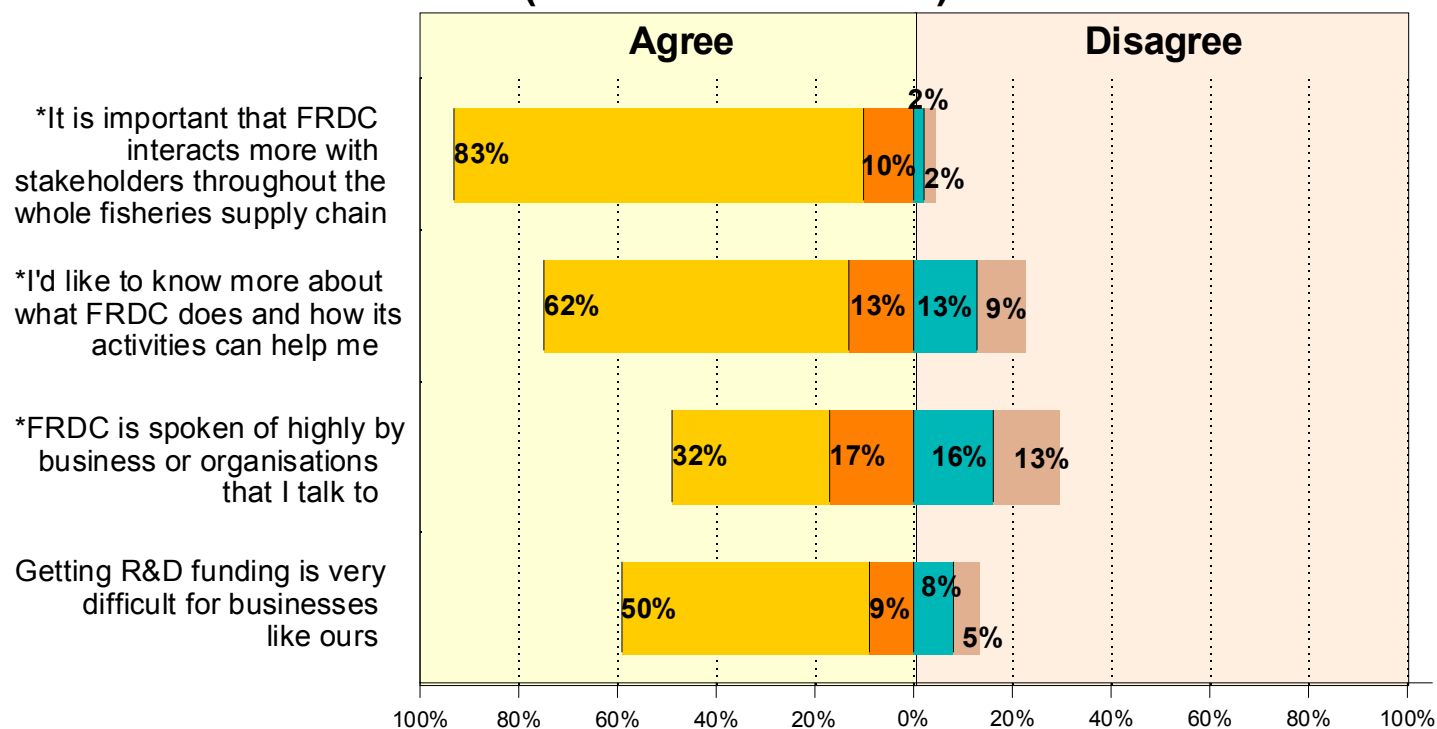


N=201 (all respondents)

"Neither agree nor disagree" and "don't knows" not shown

Attitudinal Statements

Do You Agree or Disagree With the Following? (Final 4 Statements)



Q25.

■ Agree a little
 ■ Agree a lot
 ■ Disagree a little
 ■ Disagree a lot

N=201 (all respondents)

"Neither agree nor disagree" and "don't knows" not shown
**Note: responses of those not aware of FRDC excluded (N=175)*



Conclusions and Implications

Conclusions and Implications



■ FRDC needs to work at increasing unprompted recall of the organisation

- Viewed as essential in strengthening understanding of FRDC role and relevance and value of R&D activities and initiatives
- Industry associations appear to play a vital role in this, and nurturing and maintaining relationships with industry groups is very important as they are a crucial link point between FRDC and grass root operators
- The importance of FRDC communications and specific touch (or contact) points cannot be underestimated namely, R&D News, the website, conferences and events and direct face-to-face contact (which is actively sought)
- Collectively, government departments and agencies are also a key avenue for increasing awareness of FRDC activities and should continue to be well equipped with information relating to organisation initiatives

Conclusions and Implications



■ Opportunities for enhancing knowledge of FRDC's core aims and activities exist

- Identified understanding of FRDC appears closely tied to the organisation's existing charter and core role of managing R&D and administering funding
- Understanding of FRDC's strategic role of prioritising and allocating research funds rather than just collecting and spending needs to be strengthened
- Greater prominence of FRDC's perceived role and responsibility as a '*protector*' and '*sustainer*' of the fisheries sector should be explored
- Increasing stakeholder understanding of what FRDC is all about is likely to reduce the impact of any negativity towards the organisation
- Improved knowledge about the accompanying government \$ contribution to industry funds facilitated through FRDC could further improve appraisal of the organisation

Conclusions and Implications



- **Greater consideration is needed regarding how best to engage with business operators across different sectors**
 - Particularly, those outside the traditional networks and down the supply chain. Awareness of FRDC appears to fall away dramatically amongst those businesses not involved with industry. FRDC efforts are being diminished because knowledge of outcomes at the 'coal face' is limited
 - Post harvest appraisal of FRDC is moderate and a clear majority of the survey population believe improving ties with this part of the supply chain would be advantageous. Increasing post harvest knowledge of facilitated FRDC activities has the potential to enhance consumer awareness about the benefits and merits of Australian fish and seafood
 - Survey results (and high participation rates) reflect a genuine willingness of business operators across the fisheries sector interact with FRDC and become better informed about their activities and influence

Conclusions and Implications



- **Favourable rating of FRDC performance is promising and a solid benchmark result to build on in future surveys**
 - Overall satisfaction however, does appear patchy across some industries and requires attention (even based on small samples)
 - There appears to be some divide between those satisfied and disappointed with FRDC efforts to date
 - Opinion of FRDC is noted as very high across some industries, with greater access to high levels of industry funds...in contrast a low opinion of the organisation is evident among some industries who have lower funding availability
 - A concern about the appropriate distribution of funds needs to be addressed...greater access to alternative funding may help
 - Enhancing performance levels appears to require greater effort in strengthening stakeholder beliefs of a connection with current R&D projects in terms of relevance, value and overall impact...greater involvement in general projects, and innovative low cost R&D options should be explored

Conclusions and Implications



- **It is encouraging that many are willing to give credit to FRDC for tangible benefits they have experienced from Fisheries R&D**
 - It is an excellent result for FRDC to receive acknowledgement for its role in industry development. Particular praise is given to the organisation's role in species specific research and genetic improvement
 - The result demonstrates that many business operators are able to recognise the role FRDC plays in business development. It says that – “even though you are at arms length, we can see that you're an important link and are a valued partner”
 - Despite this result, the perceived overall impact of R&D ‘on the ground’ is fair. This is a little concerning for both FRDC and industry groups

Conclusions and Implications



- **While difficult to integrate within FRDC core role, consideration needs to be made on how to facilitate greater levels of marketing and market development**
 - Clear demand exists for marketing and market development initiatives and information. A number of grassroots operators (particularly small businesses) appear to feel helpless in the face of negative price movements
 - It appears difficult for many business operators to understand why marketing is not a responsibility of FRDC
 - Exploring how market development activities can be facilitated through the current charter appears is critical
 - Establishing strong working ties with the new fisheries marketing body (if established) is vital to the overall impact of a limited industry and sector spend on R&D and Marketing

Conclusions and Implications



■ There is a genuine need for FRDC to improve communication of current initiatives

- Grassroots operators seem to be crying out for more information which can help their business...they clearly have a preference for information filtered through industry publications
- This is a clear message for FRDC to better work in with industry associations so information is not duplicated and has the highest possible impact
- The provision of more targeted and timely information should be considered
- There is definite scope to improve information provision of current R&D initiatives including communication on stock assessments, environmental sustainability projects, pollution control, water quality and species research

Conclusions and Implications



■ Although highly regarded, potential refinements to R&D News need to be fully explored

- Evidence that publication is not read 'cover to cover' and may not be having the desired impact
- Greater attention is said to be needed in tailoring industry specific based information...relevance and applicability to own business situation is questioned
- Some anecdotal evidence that the publication needs a brief key points summary of articles within (upfront)
- The publication appears to have a low impact on business practices and as such, there is scope to help integrate material on business development or communicate sources which can assist in this area
- A mailing list system is strongly supported, suggesting that limited general circulation of the publication may only be necessary (e.g. via 1 or 2 magazines such as professional fisherman)

Conclusions and Implications



- **An exciting opportunity exists to build better ties with business operators currently conducting their own R&D**
 - FRDC should seek to learn about the processes used by those undertaking their own R&D and where the organisation can best assist
 - Understand more about the overall benefits to the sector this “in-business” R&D achieves...there is a high possibility that it is currently undervalued
 - Explore more formal ties with funding sources regarding “in-business” research
 - Help overcome the perception that it is difficult to obtain funding for R&D for business development purposes
 - Initiate greater levels of in-business development and cross utilisation of ideas

Conclusions and Implications



■ FRDC is seen as a key partner in the future by business and industry

- Sustainability concerns and uncertainty over the future of the industry means business operators are looking more than ever towards FRDC to be a strong leader
- Ongoing contributions of R&D funds doesn't present a problem to many operators as FRDC has clearly been empowered to take the Australian Fisheries sector forward
- There is a clear message that many people would like to learn more about what FRDC does and improve ties with the organisation...feedback on survey results presents an opportunity to open a dialogue with key stakeholders

Conclusions and Implications



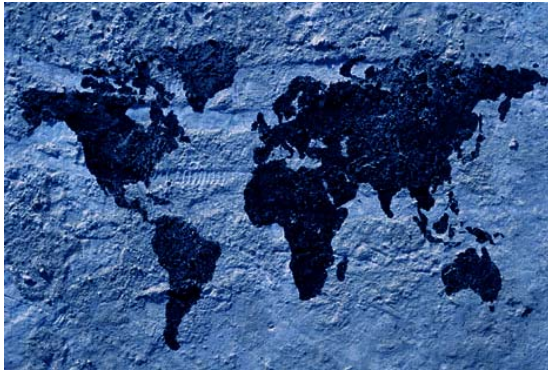
- **Realistic KPI targets should be set for FRDC for the coming 12 months to measure against when stakeholder survey is expected to be repeated**

FRDC Stakeholder Survey KPI Targets for 2006-2007	Current	Target
(Q1.) Proportion able to identify FRDC as the organisation responsible National Fisheries R&D (unprompted)	47%	55%
(Q7.) Proportion of respondents with positive comments in describing high rating of FRDC*	64%	75%
(Q11.) Proportion of respondents aware of FRDC who think the organisation play a significant role in direct benefits achieved through R&D*	60%	70%
(Q16.) Overall performance rating of FRDC (with a focus on increasing 'very' high)*	58%	65%
(Q25 Statement 8) Proportion agreeing FRDC is spoken of highly by businesses or organisations I talk to*	49%	60%

***Proportion of respondents answering specific question, not reflective of total sample**

Reader Note: Q11. KPI has been amended from original report to reflect only those respondents aware of FRDC





What is she going to say?



What is he going to hear?



What does she have in mind?

FRDC Stakeholder Groups Research

Qualitative Key Stakeholder Interviews Report

Date: 11 May 2005

Prepared for: FRDC

Ipsos Consultants:

Jonathan Jenkin

George Katos



Presentation Overview

- Background
- Key Insights
 - Relationship with FRDC
 - Impressions of FRDC
 - FRDC Communications
 - Rating of FRDC Future Priorities
- Implications
- Next Steps



Background

■ Focus...

- Better understanding of key stakeholder needs and priorities (now and into the future), nature of relationship with FRDC, overall impressions and suggested areas for improvement

■ What we did...

- Combination of in-depth face-to-face and telephone interviews
- 20 FRDC nominated key stakeholders spoken to:
 - 6 Fisheries Managers
 - 12 Industry Group Representatives
 - 2 Other (Rec Fish and Sydney Fish Markets)
- Interviews conducted by senior Ipsos consultants...George Katos and Jonathan Jenkin
- Duration of interviews...1 to 1.5 hrs
- Timing...21 February to 11 May 2005



Key Insights

Seen to be Shaping the Future

- FRDC is seen to play a key role in shaping the future health of fisheries industries
 - All industries view FRDC as a vital partner in facing future challenges
 - Widely recognised by industries that there is little hope for highly profitable and prosperous times ahead
 - Some industries are recovering from poor profitability levels, while others comment on future challenges based on smaller margins
 - Without the backing of FRDC many industry stakeholders strongly question the industry's future sustainability and growth

“We unquestionably see the future health of our industry closely tied to FRDC. Their presence and guidance is a must.”

Strong Relationships in Place

- Most stakeholders reflect positively on their relationship with FRDC...lots of favourable remarks
 - Industry bodies in particular provided numerous unprompted examples of a healthy and strong working relationship with FRDC. Common verbatim examples include:

“High levels of professionalism evident.”

“FRDC is visionary and has a strong strategic focus.”

“FRDC has a strong knowledge of our industry needs.”

“They are very approachable and responsive.”

“Highly competent compared to others in the public sector.”

“Well organised systems and processes.”

“Extremely strong governance.”

“Respond quickly and have a strong ability to deliver.”

“Open to giving industry a chance to meet the deadlines.”

Highly Respected by Many

- Overall impressions reflect an organisation that has the respect of its stakeholders
 - FRDC is seen by most as a very efficient, well organised and competent outfit
 - High confidence exists in FRDC's ability to deliver on its core business role and objectives
 - FRDC personnel are praised for their intimate knowledge of industry issues and ability to proficiently undertake tasks recognised as core role activities
 - High value is placed on FRDC levy fund 'governance' and project management capabilities
 - Highly visible at key industry events and forums

Some Weaknesses Evident

- Negative impressions typically relate to FRDC's strategic direction and focus and not day-to-day management weaknesses

- Verbatim comment examples include:

"The industries have been production focused and FRDC has reflected this."

"Sometimes FRDC are not driven enough by the need to achieve outcomes."

"Some important areas are strong ignored by FRDC...particularly people and business development."

"They listen, but sometimes don't hear us regarding what we see as important issues."

"There has been occasional mistakes with milestone requests being sent out at the wrong time, but they were quickly sorted out."

"Not sure whether they (FRDC) are always on top of all the issues impacting the long term viability of the industry, although there is recent evidence suggesting they are more conscious of reacting to this."

Management Style Needs Revisiting

- Some frustration exists in the adopted management style of FRDC
 - More 'mature' industry stakeholders place a much lower value on a 'leadership' role approach undertaken by FRDC, preferring a more interactive 'facilitator' approach
 - Examples cited:
 - Better focus by FRDC on facilitating research outcomes in line with strategically developed and implemented industry priorities
 - There is a push away from having FRDC do things on behalf of industry. e.g. Backlash against Seafood Services Australia
 - Establishment of SSA seen by some stakeholders as a bold and positive initiative, but against the long term needs of many mature industries who have a capacity to drive their own development

Future Priorities Need Closer Attention

- Some concerns exist over FRDC's current planning to meet the future requirements of the sector
 - Many stakeholders feel that FRDC needs to better account for the maturing of industries and potential changes in accessibility of funds for the sector
 - Greater emphasis will also be placed on 'return on investment' of R&D by both industry and fisheries managers due to decreasing industry margins and budget pressures
 - Serious challenges exist in the 'marrying up' of FRDC priorities with established fisheries managers business priorities i.e.:
 - Balancing perceived 'private good' and 'public good' benefits of R&D
 - Matching FRDC R&D priorities in line with what fisheries managers define as critical issues likely cause the greatest 'political pain' unless acted on

"Sometimes they don't know where to direct the development."

Programs Are Well Praised

- Current FRDC programs are praised for their ability to meet the core needs of industry
 - Industry stakeholders are typically satisfied with current FRDC programs
 - Sub-programs are supported by smaller industries because of greater involvement and control
 - High value is placed on industry specific commissioned research
 - Project and program managers are praised for their extensive knowledge of industry and specific research needs...strong credentials in place

Improvements Have Been Highlighted

- Suggested improvements to FRDC programs typically reflect individual stakeholder needs and challenges
 - Some state to state based issues exist regarding value of research across different geographic locations
 - Perception that researchers are ‘running the agenda’ in FRDC in some areas where stakeholders desire less pure science based projects
 - Sub-program projects need to be more intensely scrutinised for ‘return on Investment’ given their perceived lack of value across stakeholder groups
 - Desire to overcome any ‘hit and misses’ with projects where there is a possible gap in expertise (within FRDC and the commissioned research agency)
 - Perception that further research and market development in aquaculture must be justified by increased uptake and commercial investment

‘On the Ground’ Program Outcomes Essential

- Strong push for ‘on the ground’ outcomes from future programs/projects
 - Stakeholders are calling for greater emphasis on industry development based projects which provide more effective ‘on the ground’ solutions to current issues. Examples of development based projects include:
 - post-harvest and value adding
 - market development/market intelligence
 - people development programs including OH&S and skills training
 - socio-economic impact studies which add weight to political lobbying
 - environmental (ecosystem) impact assessments

“We have big players (fishing co’s) who are still product/commodity traders – we need a whole of supply chain focus.”

Some Question Funding Process

- Mixed viewpoints evident regarding the merits of the current research funding application process
 - According to industry groups, research agencies appear to be struggling to come to terms with the processes involved e.g. meeting milestones and difficulties with the project application process
 - Some industry problems also exist regarding milestones and cash flow due to current project structure
 - Industries find it extremely frustrating when agreed research priorities are not acted on or “ignored”
 - Current project timelines mean industry is unable to respond quickly to issues through commissioned research

“It is really hard to react quickly to issues given the current research application process.”

FRAB Process Not Meeting Needs

- Some levels of discontent exist in the ability of the FRAB process to meet stakeholder needs
 - The FRAB process is not seen to be meeting the needs of a number of stakeholders (particularly in SA and VIC)
 - Problems highlighted include low strike rate with project approval, internal politics, slow turn around time and mixed messages in R&D priority listing
 - A number of stakeholders deliberately avoid applying for funding via the FRAB process given its perceived 'unpredictable' nature
 - Process is seen as ineffective unless projects are funded in order of importance and value
 - Several comments were made that FRABs are too science focussed

“FRDC don’t always take the time to explain the logic when certain things don’t get funded.”

Stakeholders Face Own Challenges

- Fisheries Managers face challenges in balancing own priorities with those facilitated through FRDC
 - A challenge exists for fisheries managers to meet the needs of internal stakeholders requiring private and public sector returns from projects
 - High priority projects are becoming increasingly difficult to fund every year against business priorities
 - Strong state based emphasis on 'ecosystems sustainability' and 'profitability challenges of industry' as business priorities
 - General dislike for sub-programs because of the perceived low impact of funding
 - Reliance on FRDC for funding contributions has typically decreased and Fisheries Managers are becoming increasingly reluctant to contribute to projects based in other States

Stakeholders Face Own Challenges

- Fisheries Managers face challenges in balancing own priorities with those facilitated through FRDC (.../cont'd)
 - Some unhappiness when state based dollars are used for national projects eg. SSA EMS project
 - Fisheries Managers seek an annual flow back of research to the states to retain internal resources and funding
 - Fisheries Managers have an issue with FRDC reporting to ASIC and Recfish but not to AFMA members

“It needs to be rethought where FRDC sits in the future.”

FRDC Communications Having Variable Success

- Current communication initiatives serve their purpose, but are perceived to have variable success in effectively engaging with stakeholders
 - All current communication methods with stakeholders were acknowledged for their value...seen to be worthwhile
 - Most communication initiatives however were questioned for their ability to deliver effective and tailored information at different levels within stakeholder organisations
 - Opportunities exist to build effectiveness and 'cut through' of current communication initiatives e.g.:
 - Establish better links to existing industry communication initiatives
 - Better define the target markets of communication materials
 - Recognise the information 'threshold' faced by stakeholders and ensure media content is succinct and useful

R&D News Valued, But Perhaps Not Widespread

■ R&D News seen as informative

- Valued by researchers and industry management
- However, questioned over its ability to engage 'grass roots' operators and stakeholders throughout the supply chain...extent of value needs to be evaluated
- Seen by some to often duplicate industry based communication efforts and could better account for existing initiatives
- Suggested improvements from stakeholders:
 - Develop industry based sections/reporting which provide the opportunity to pass 'small bits' of information on
 - Key point summary at front of publication
 - Perhaps could move to an electronic based form
 - Perhaps incorporate into existing media
 - Expand magazine reach to other sectors
 - Consolidate distribution to a centralised 'mailing list' (possibly based around research project target groups or industries)
 - Look to have instilled as a 'Journal of Science'
 - Ensure FRDC partners are well recognised in publication (not just FRDC personnel)

FRDC Website Seen As Helpful

■ FRDC website seen as helpful

- Typically low use and limited understanding of its purpose by respondents
- Cited as containing helpful information when writing applications...potential value cannot be underestimated
- Suggested improvements from stakeholders:
 - Post executive summaries of reports on website
 - Promote purpose of website
 - Develop as a more 'user friendly' point of contact for FRDC information
 - Better target those who would actually use the internet for FRDC publications
 - Better links with other highly valued websites like GrowFish

Research Reports and Conferences Well Received

■ Research Reports

- Seen as an important 'point of reference' for projects
- Executive summaries are seen as excellent because of non-technical terminology
- Suggested improvements:
 - Perhaps lower/nil cost to levy payers (include printing provision in project funding)

■ Conferences

- Industries are satisfied with FRDC's involvement facilitating and funding of conferences
- Good balance of current funding allocations
- Important to show that FRDC is part of the industry
- Essential branding and marketing exercise for FRDC
- Need to realise that it will never provide an intrinsic return

FRDC Awareness Low at ‘Grass Roots’

- Low awareness of FRDC is perceived to exist at ‘grass roots’ level according to industry groups
 - Perceived low awareness of FRDC brand, knowledge and value of FRDC role and initiatives, and understanding of levy contribution
 - Questionable if ‘grass roots’ see FRDC having a direct impact on livelihood...important to quantify this in follow-up phone survey
 - Industry groups are confident ‘grass roots’ operators place high importance on continued R&D in their industry to remain competitive in the global market
 - Hard to get to ‘grass roots’ level because of very closed communities, set culture and mixed levels of literacy
 - Those with awareness seek a strong ‘business to business’ orientation and evaluate FRDC performance against direct business practices and implications

Future Communications Need to be Better Focussed

- Future communication efforts need to better focus on aiding implementation of R&D outcomes
 - There is a need to overcome the disconnect between conducting high quality research that is not extended out into the broader industry
 - FRDC could look to target more industry specific events to disseminate results
 - Look to make better use of existing 'on the ground' resources to build rapport with industry
 - Need to get more to 'grass roots level', but should acknowledge its limitations and be resourceful e.g.:
 - Build rapport with existing industry networks and ensure any initiatives are complementary to their goals and expectations
 - Acknowledge cultural issues and practices when considering engaging at 'grass roots' level .e.g. literacy levels, tendency to attend events, importance placed on issues depending on season etc

Most Future FRDC Priorities in Line with Stakeholder Expectations

■ Rating of FRDC future priorities list by stakeholders...

FRDC Priorities List	Rating
Develop data and tools to examine economic, social and cultural impacts of planning policies	✓✓✓✓
Develop and implement management frameworks that facilitate self management, market focus, independent accreditation, and cost efficiency	✓✓✓
Quantify recreational catch and incorporate into the fisheries management framework	✓✓✓
Increase profitability, competitiveness and market access while producing safe, high-quality seafood	✓✓✓
Establish better ways of defining inter-sector resource allocation e.g. recreational, tourism, commercial etc.	✓✓✓
Develop a market-based culture in industry	✓✓
Increase industry capacity to adopt R&D	✓✓
Undertake better consumer education on industry activities	✓✓
Achieve alternative governance frameworks that support financial flexibility and meet broader natural resource management requirements	✓✓
Develop an economically viable market based aquaculture industry	✓✓
Increase the cost effectiveness of compliance of regulatory requirements of natural resource environmental legislation	✓
Develop a better research based process for defining marine protected areas	✓
Educate the community about fisheries and aquaculture products	✓

Note: The more ticks, the greater the importance placed on priority



Most Future FRDC Priorities in Line with Stakeholder Expectations

■ Rating of FRDC future priorities by stakeholders

- There is a collective view that listed FRDC priorities are all in some way important
- Priority areas generally reflect what FRDC should be focusing on
- Strong emphasis is placed on the importance of FRDC's future priority of “development and implementation of industry management frameworks”
- Numerous comments on the need to transform the industry into a ‘market culture’ rather than a ‘production’ culture was recognised for its importance among stakeholders
- Little emphasis placed on the importance of the following priorities (not shown on slide 25):
 - Increase the quality and value of recreational fishing experiences
 - Improve career pathways within the fishing sector
 - Develop productive relationships with NGOs and other partners

Other Important Priorities Mentioned Worthy of Consideration by FRDC

- Rating of FRDC future priorities by stakeholders
 - Areas highlighted as not being properly identified by FRDC as a future priority include:
 - Development and implementation of an R&D approach to facilitate sustainable resource management
 - High value species, gear selectivity and technical efficiency of fleets
 - Whole of Government directions e.g. shark action plan, DEH conditions of export (move to EBFM), Seal action plan etc
 - Non extractive user groups, MPAs and increasing indigenous participation
 - Invest in the appropriate people resources so that the developments are sustainable and integrated
 - Stakeholders commonly highlighted sustainable development as an issue FRDC will need to play a key future role in addressing
 - Need for FRDC to better focus on the long term outlook of the sector (5-10 years out)

Some Suggestions Made for FRDC to Consider

■ General recommendations to FRDC by stakeholders

- Consideration of the future succession of key leaders within FRDC
- Greater number of 'public faces' of FRDC – currently seems limited to key leaders or senior management only within organisation
- Greater empathy of industry needs at Board level
- The Board should consider including more business and social science professionals
- Improved consideration of whole supply chain issues in R&D
- Be prepared to call for 'Expressions of Interest' for research providers when unable to source appropriate research expertise
- Greater scrutiny placed on industry to display plans to implement R&D
- More funding towards areas which can assist on the ground results and facilitate industry policy decisions
- Allocate more resources to 'people development' and 'capacity building' programs
- Greater willingness by new Managing Director to engage with a broader number of stakeholders and non-traditional networks



Implications

Important Considerations for Follow-Up Telephone Survey

■ Implications for telephone survey

- Enhance understanding of R&D News readership
 - Need to establish who actually reads the publication and validate its overall value.
- Establish primary and secondary awareness of FRDC
 - Most 'grass roots' operators will possibly not be aware of FRDC, but may have an understanding of industry research conducted in conjunction with FRDC. The survey needs to account for these layers of understanding.
- Questions need to be tailored to different target audiences
- Establishing current business needs of grass roots operators will assist in the positioning of FRDC initiatives
- Establish current perceptions of the health and viability of industries and the fishing sector supply chain



Important Considerations for Follow-Up Telephone Survey

■ Implications for telephone survey (.../cont'd)

- Investigate the impact of R&D on business practices...what is the connection being made between FRDC activities and initiatives and practice change
- Develop a greater understanding of other R&D funding streams accessed by commercial businesses in the sector
- Establish the level of tie-in of commissioned R&D with own 'in-business' R&D
- Establish who stakeholders use as a first point of call for information



Next Steps

Next Steps

- Finalise telephone contact lists
- Develop and finalised telephone survey
- Conduct telephone interviews
- Presentation of survey results and implications
- Distribution of top line results to the Board
- Presentation of Final Report





What is she going to say?



What is he going to hear?



What does she have in mind?

FRDC Stakeholder Groups Research

Stage 2: R&D News Survey Report

Date: 24 August

Prepared for: FRDC

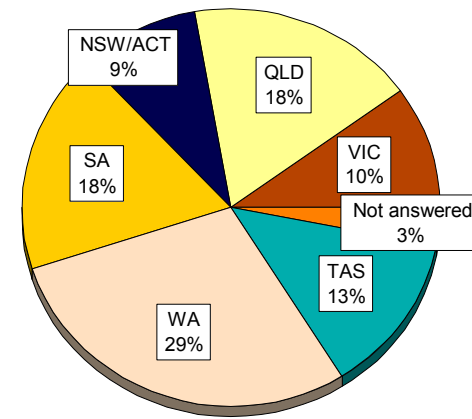
Ipsos Consultants: Jonathan Jenkin
George Katos

Background

- Four page self completion survey inserted into the December 2004 edition of R&D News
- Total of 68 responses received

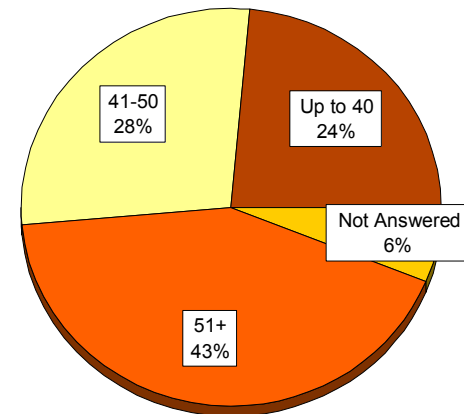
Respondent Occupation	%
Scientists and researchers	13%
Retired fisherman	12%
Fisherman (general)	10%
Fisheries Management	7%
Commercial/professional fisherman	7%
Aquaculture	6%
Retailer/ wholesaler	6%
Fish Processor	3%
Educator/Trainer	4%
Not answered	1%
Other	31%

State Location



Q1.

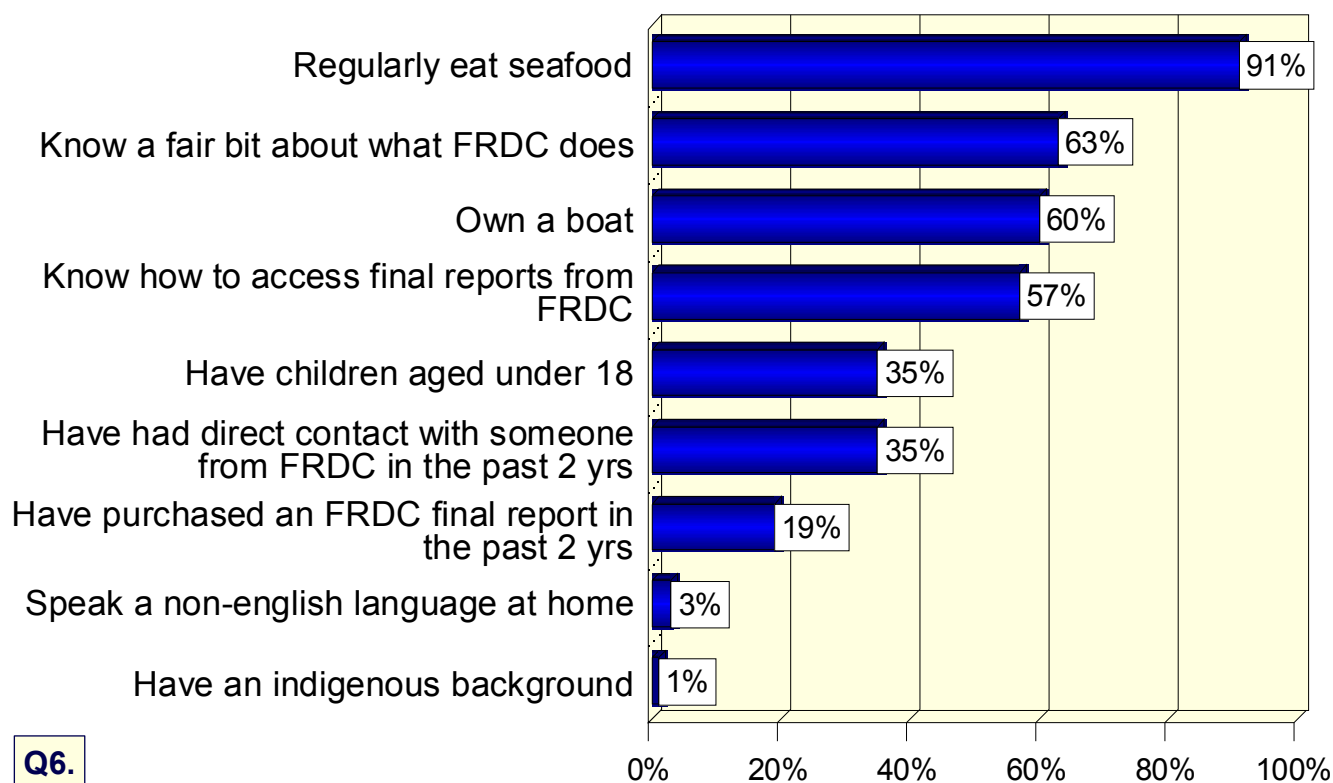
Age



Q3.

Respondent Profile

Which of the Following Describes You or Your Interests? (Multiple Response)

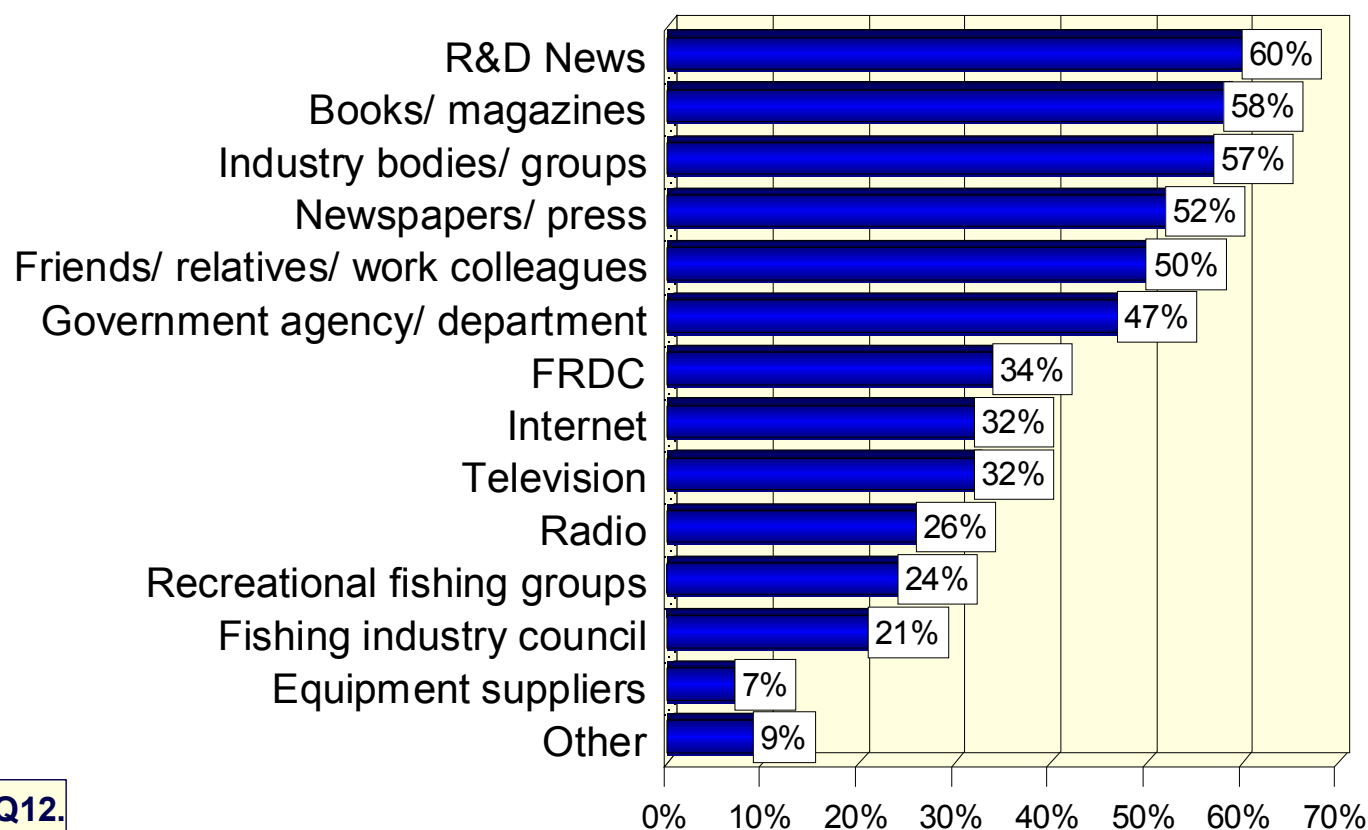


Major Highlights

- Majority of survey respondents receive the publication through Professional Fisherman (chart p6)
- Approximately one third receive multiple copies of R&D News (chart p7)
- Many respondents would have a preference for receiving R&D News via Direct Mail (chart p8)
- R&D News cited by many respondents as a major source of industry information (chart p11)
- Information on current research is clearly the content highest valued in the R&D News (chart p12)
- Most respondents rate the publication *Fairly/Very Highly* (chart p13)
- The publication is praised for its current format and information value (chart p14)
- Questionable relevance of the publication to business issues and impact on changing behaviour (chart p14)

Respondent Information Sources

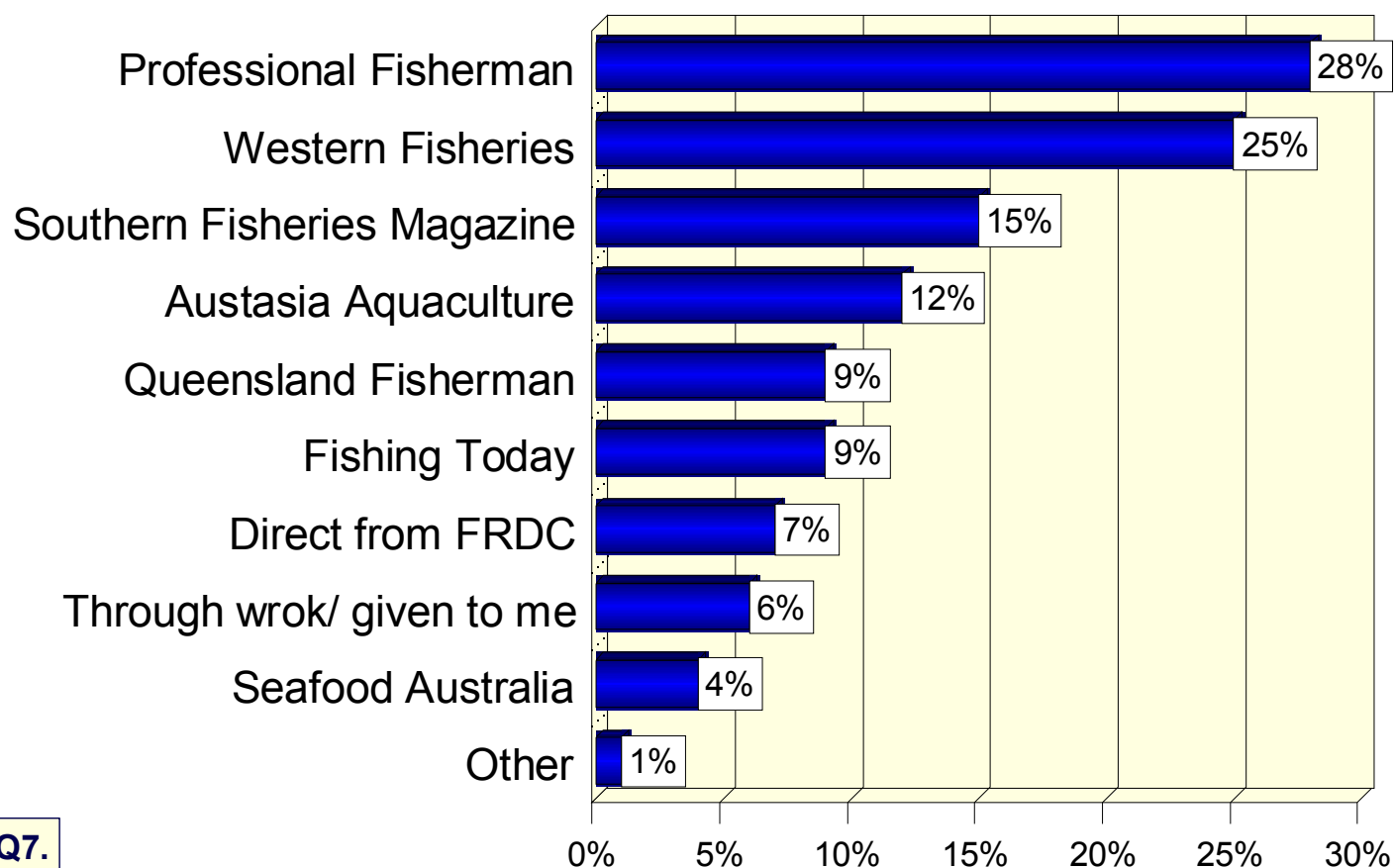
Who or Where Do You Go to or Rely on For the Information on Your Fishing Industry? (Main Mentions Only)



Q12.

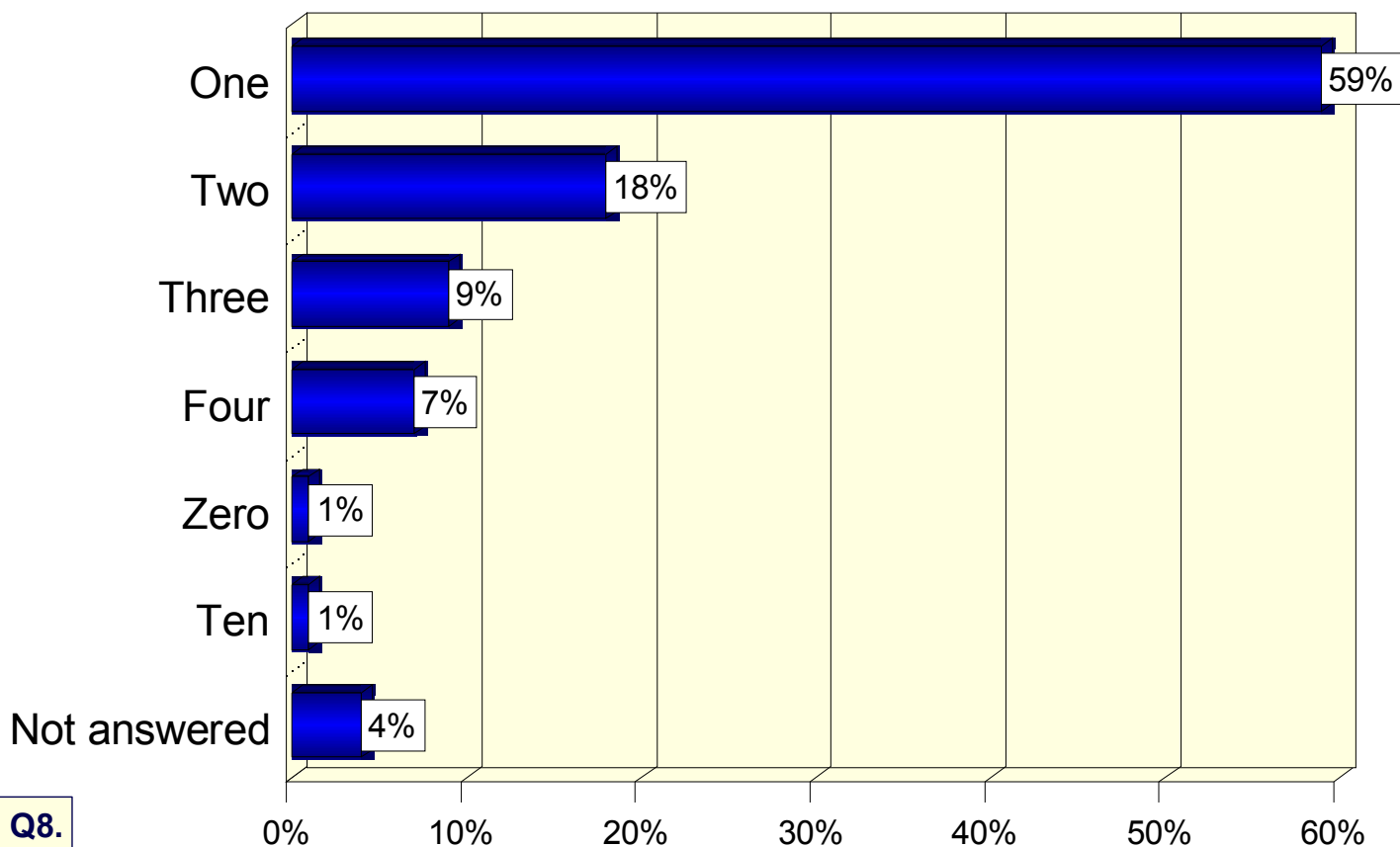
Receiving the R&D News - Current

How Do You Normally Receive R&D News?



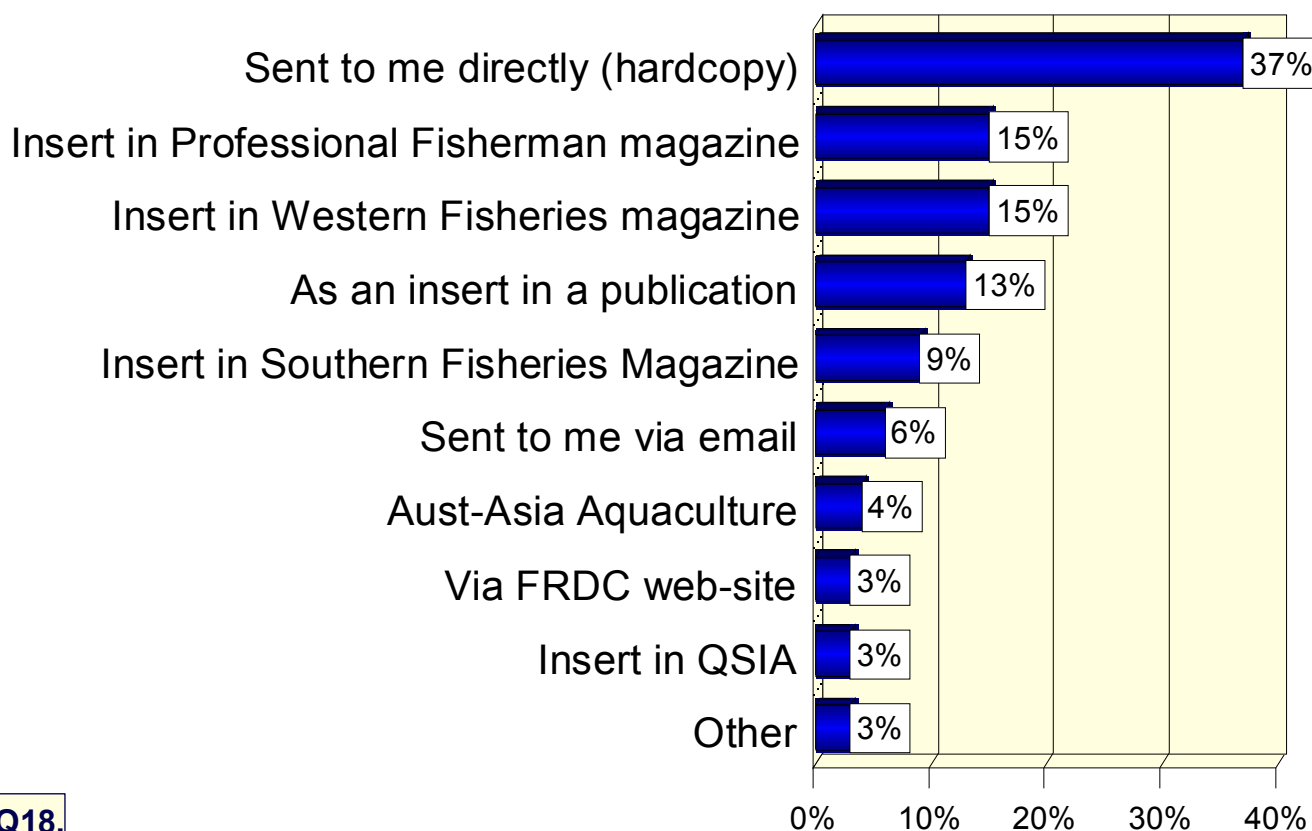
Receiving the R&D News - Current

How Many Copies of FRDC R&D News Do You Receive?



Receiving the R&D News - Future

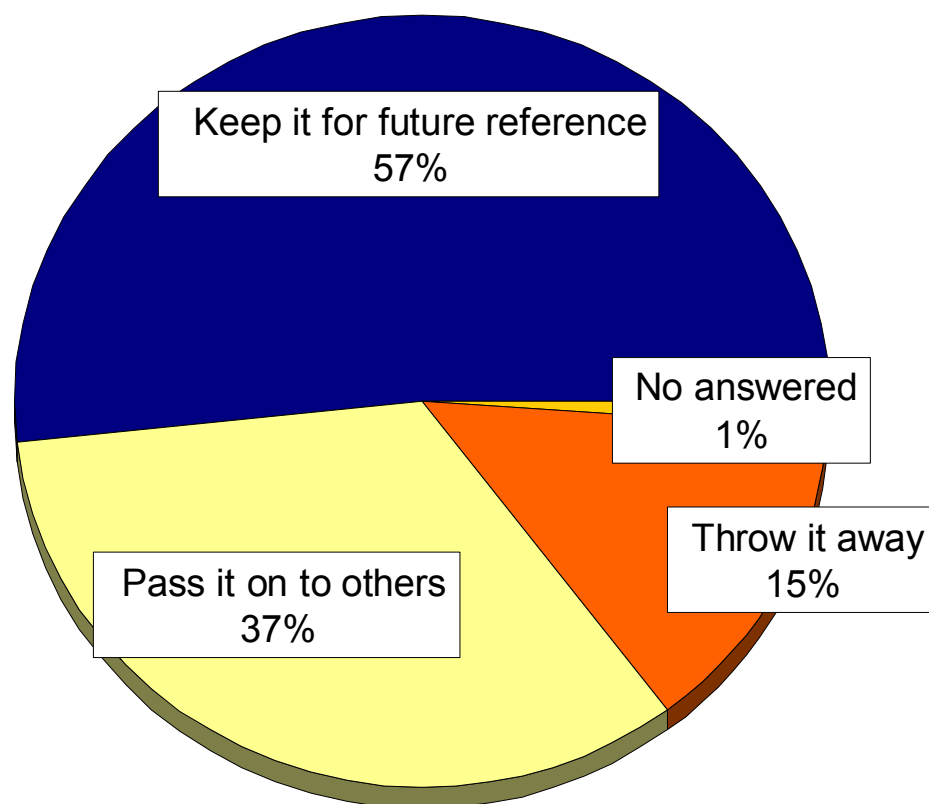
How Would You Prefer to Receive R&D News in the Future?



Q18.

Reading the R&D News

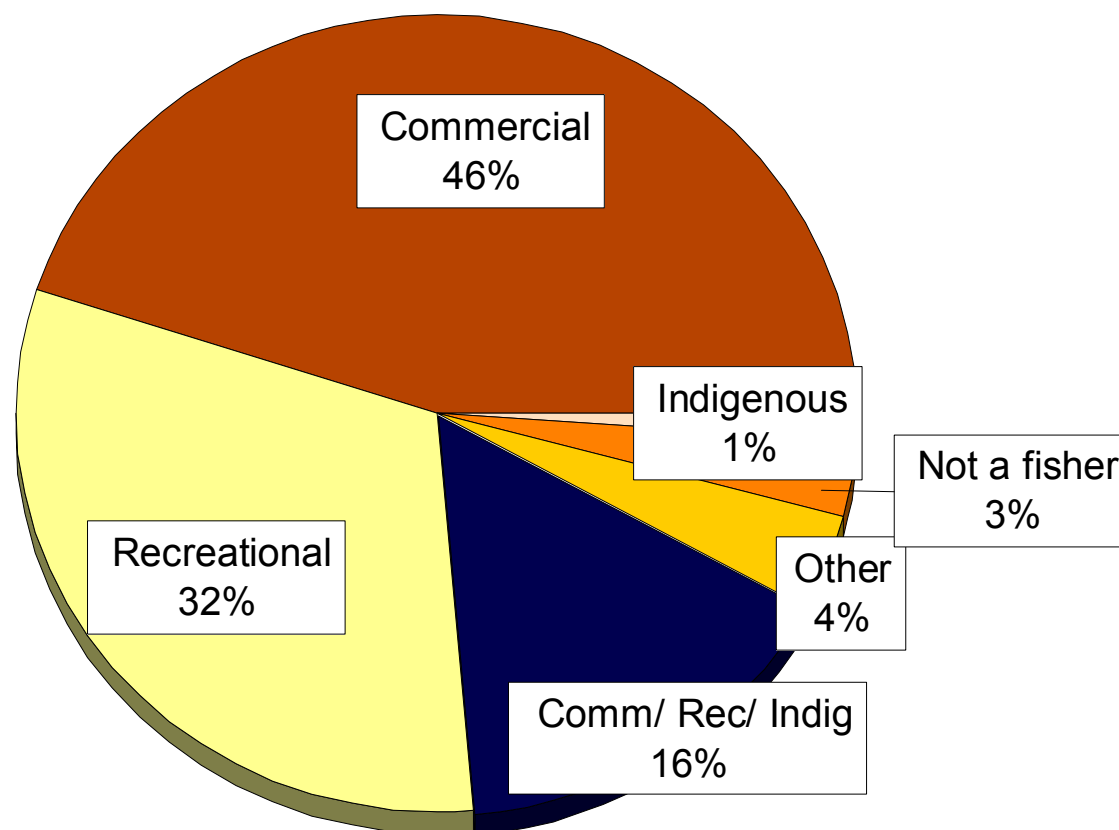
What Do You Typically Do With Publication Once Finished With It?



Q11.

Why Read R&D News?

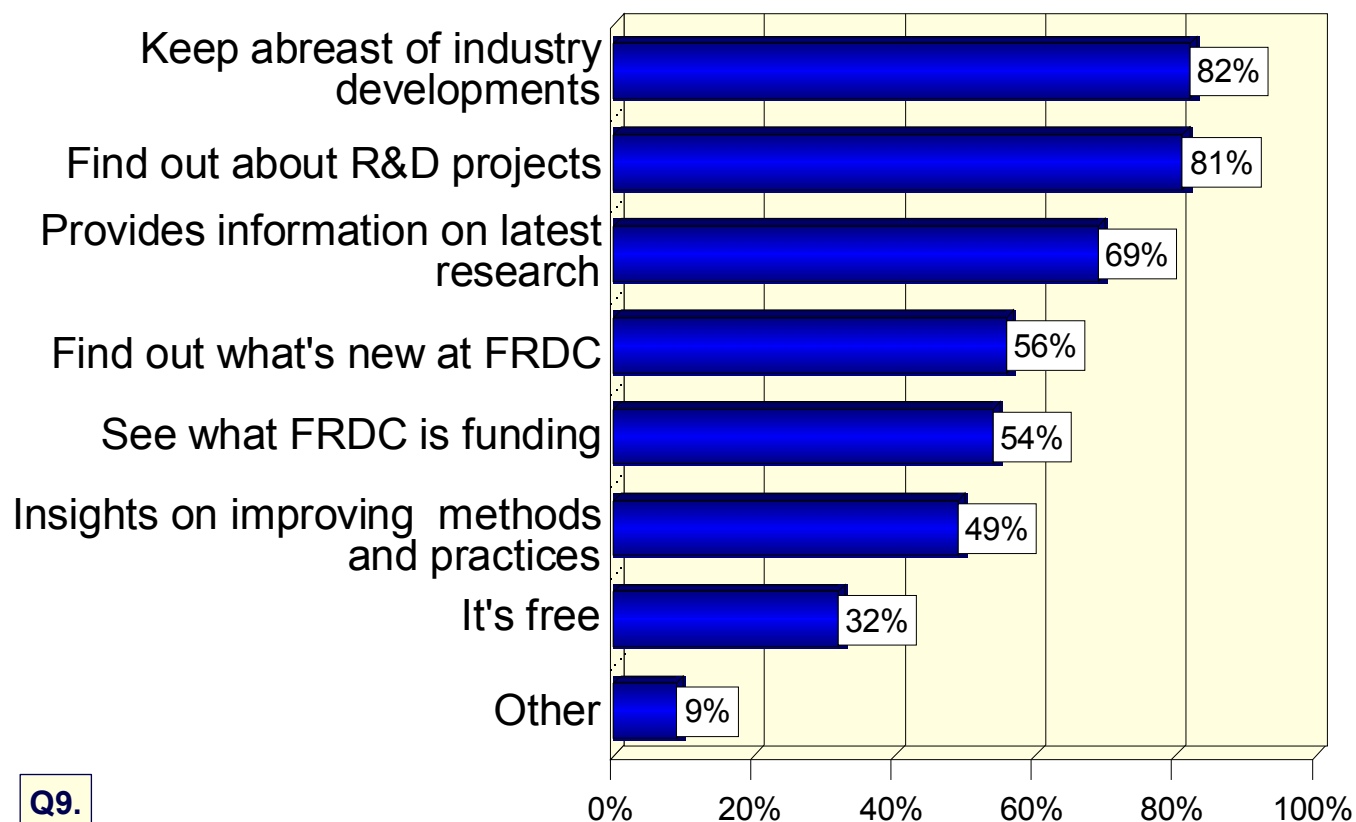
From What Perspective Do You Read the R&D News?



Q5.

Why Read the R&D News?

How Do You Normally Read R&D News? (Multiple Response)



Content of R&D News

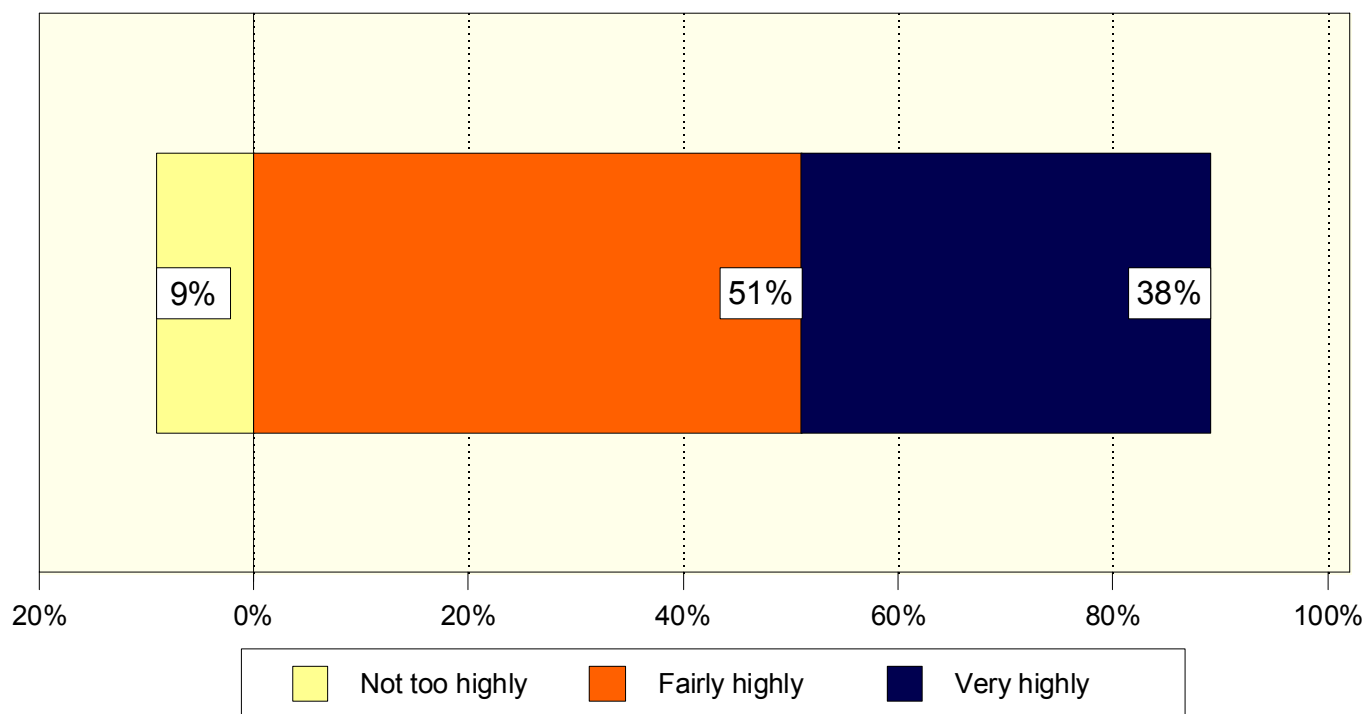
What Specific Information or Articles Within R&D News Do You Normally Consider of Most Value?



Q17.

Rating of R&D News

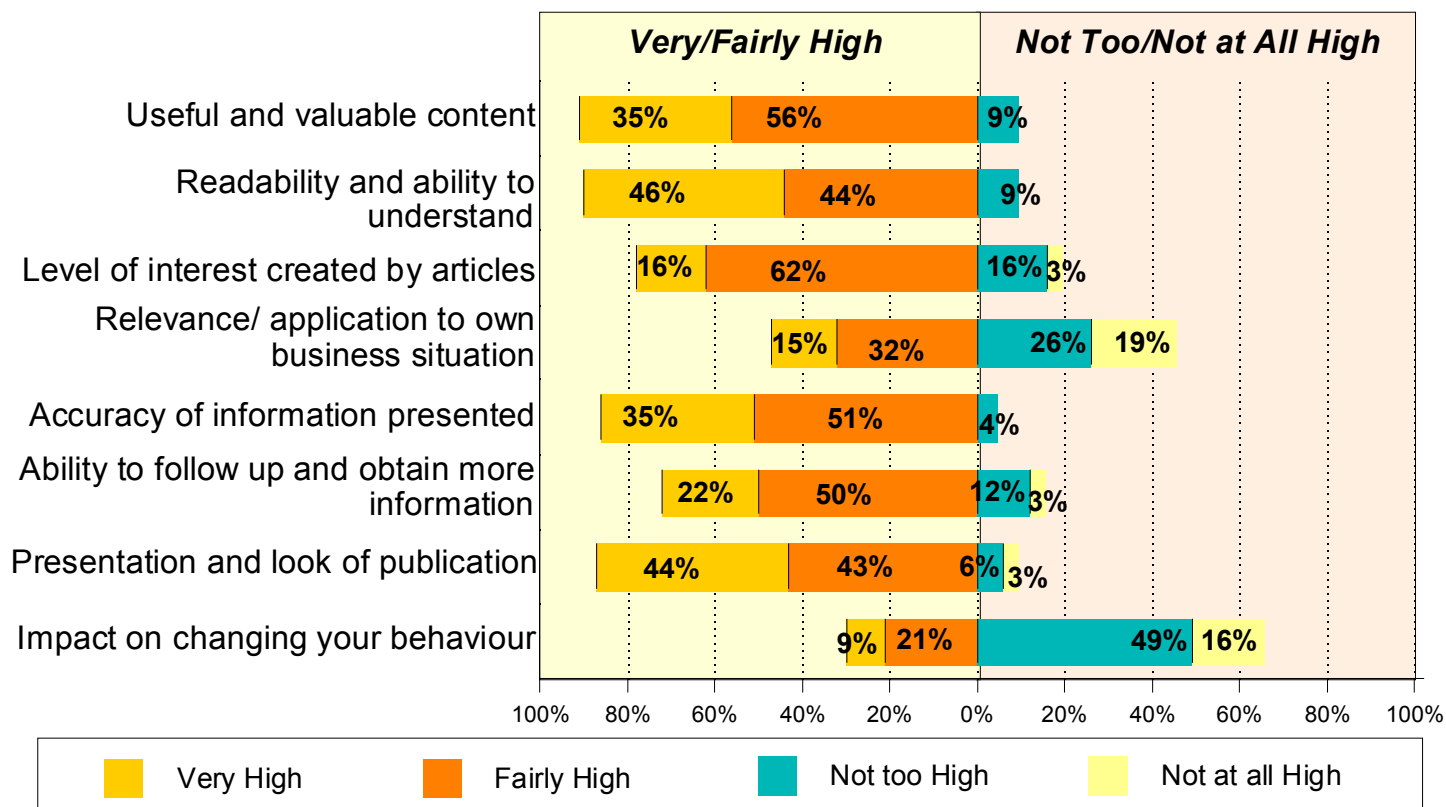
How Would You Rate R&D News as a Publication?



Q13. N=68
"Not answered" not shown (1%)

Rating of R&D News

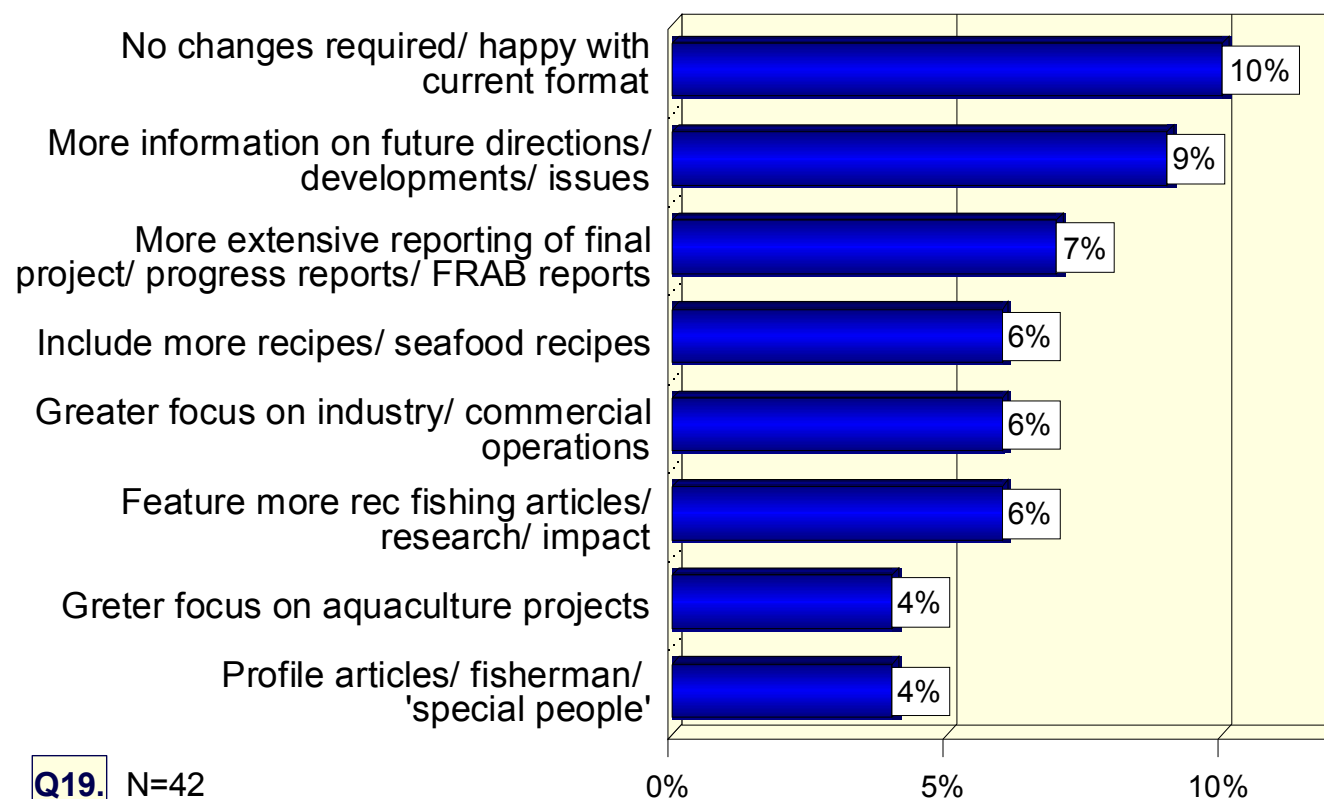
How Would You Rate R&D News on the Following Specific Attributes?



Q14. "Not answered" not shown

Suggested Improvements

Thinking of R&D News, What Suggestions Do You Have on How It Could be Improved? (Unprompted - Main Mentions Only)



Suggested Improvements

Other Comments Made (Unprompted - Main Mentions Only)

