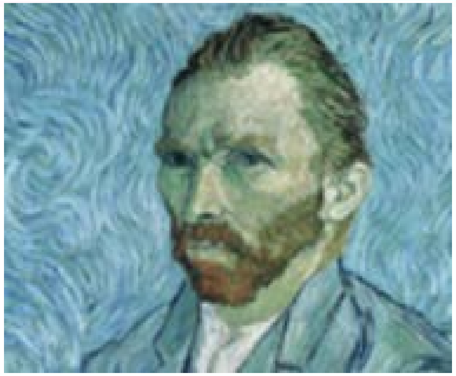
What is she going to say?



What is he going to hear?

What does she have in mind?

FRDC Stakeholder Groups Research 2006

Final Report of Findings

Date: 27 October 2006

Your Ipsos Consultants: George Katos
Annabelle Subramaniam

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. The results are based on total respondents, however there may be questions where data presented is based on subsets of respondents.

Report Contents

Background

Background

- **Primary Aims:**
  - The aim of the survey is to ascertain the current level of understanding, attitudes, and expectations of stakeholders with regard to activities undertaken by FRDC as well as R&D priorities, and track changes in results compared to the 2005 benchmark survey.

- **Project Deliverables:**
  - Comparisons made against results from the 2005 survey will demonstrate changes in stakeholders' attitudes and expectations, and results are expected to provide FRDC with clear direction on how best to refine operational and communications programs and activities.

- **Methodology:**
  - Conducted a total of 130 interviews:
    - Cross-section of grassroots operators, post-harvest businesses and the recreational fishing industry groups…snapshot of current perceptions, awareness and attitudes
    - Average survey length: 25 minutes
    - Survey conducted in August 2006
    - Respondents sourced from industry associations, FRDC, and other industry contacts

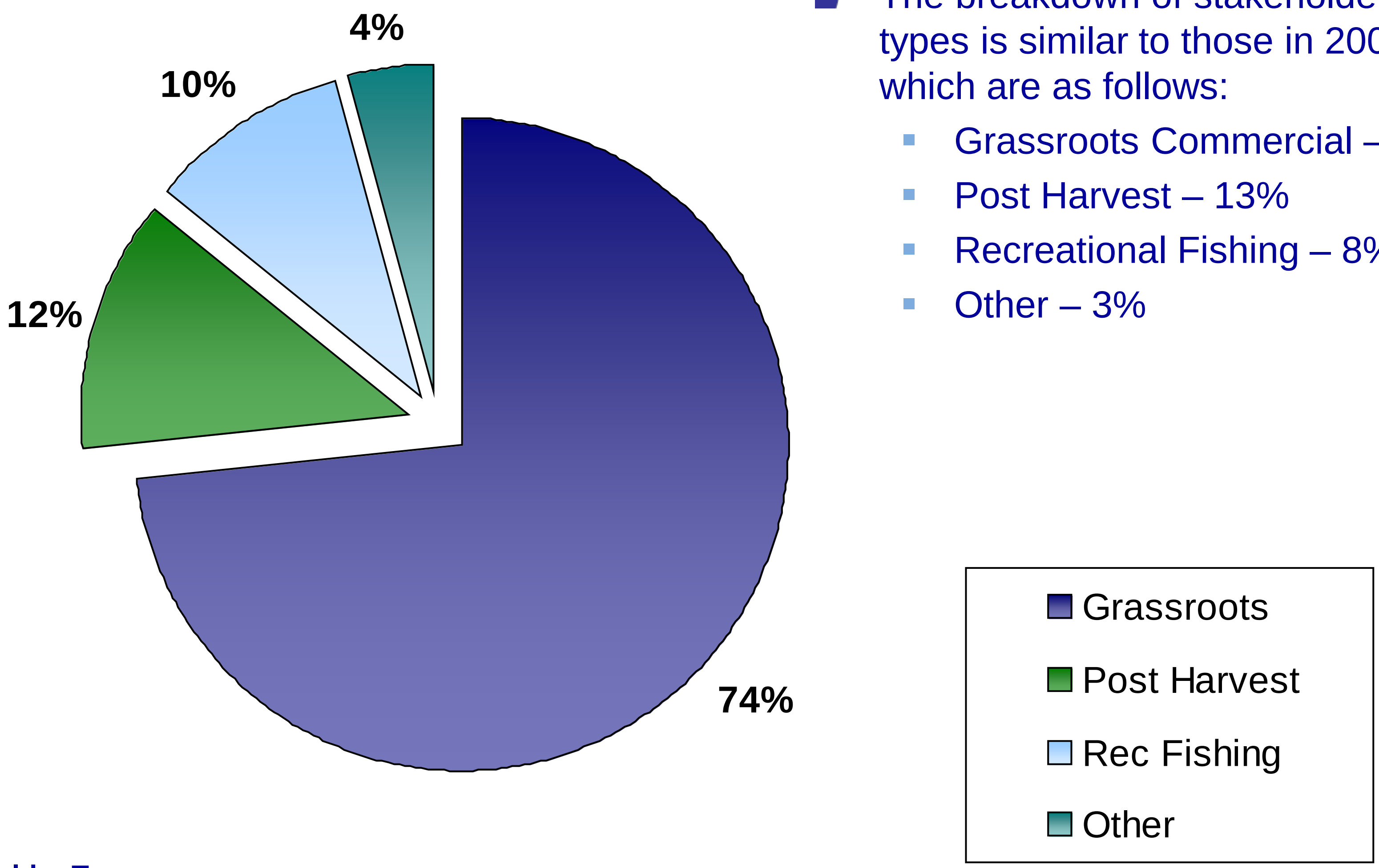
Profile of Respondent Type

Respondent Type	Number Interviewed	% Sample Interviewed*
Australian Abalone Growers Association	3	2%
Atlantic Salmon	6	5%
Barramundi (Aquaculture)	5	4%
East Coast Prawn Fisheries	9	7%
Pacific Oysters	15	12%
Pearls	6	5%
Post-Harvest	18	14%
Recreational Fishing	13	10%
Rock Lobster	17	13%
Southern Bluefin Tuna	6	5%
South East Trawl Fisheries	7	5%
Sydney Rock Oyster Farmers	5	4%
Wild Catch Abalone	16	12%
Other	3	2%
TOTAL	**130**	**100%**

* Include numbers found to be inactive/ out of service

- 'Recreational Fishing' respondents included peak body representatives only.
- 'Post Harvest' respondent types included the following:
  - Retailers
  - Wholesalers
  - Processors
  - Exporters
  - Restaurant Managers
  - Importer
  - Agents
- Wild catch (n=46 *grassroots commercial respondents only*)
  - Northern Prawn Fishery, Wild catch Abalone, Rock Lobster, East Coast Prawn Fisheries, South East Trawl Fisheries
- Aquaculture (n=49 *grassroots commercial respondents only*)
  - Australian Prawn Farmers, Southern Bluefin Tuna, Atlantic Salmon, Pearls, Pacific Oysters, Sydney Rock Oysters, Barramundi

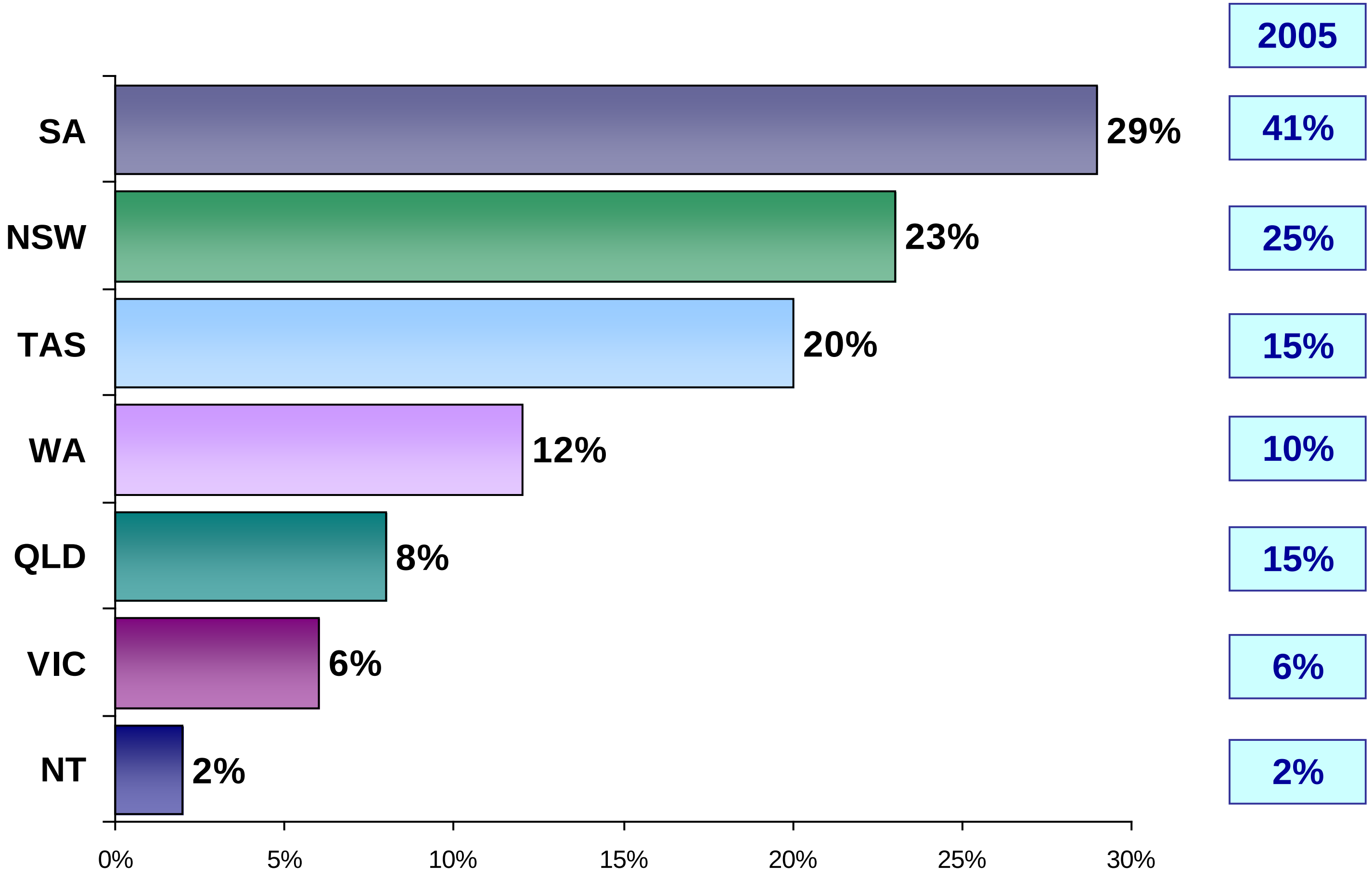
Profile of Respondents – Stakeholder Type



- The breakdown of stakeholder types is similar to those in 2005, which are as follows:
  - Grassroots Commercial – 76%
  - Post Harvest – 13%
  - Recreational Fishing – 8%
  - Other – 3%

S2. Stakeholder Type
2006 Base: n=130 (All respondents)
2005 Base: n=201 (All respondents)

Profile of Respondents – Location



S1. Location
2006 Base: n=130 (All respondents)
2005 Base: n=201 (All respondents)

Profile of Respondents – Based on own definition or interpretation of statements asked

Respondent Profile	**2006**	**2005**
Base (n=)	*130*	*201*
Compared to others I am typically one of the first to adopt new ideas and practices in my business	84%	77%
I plan to still be operating my business in 5 years time	84%	88%
I am actively involved in my industry association	78%	79%
I regularly attend fisheries events	76%	77%
I value highly industry journals or magazines	74%	82%
I own and operate my own fishing business*	74%	Not asked
I rely on the internet for sourcing important information for my business	68%	53%

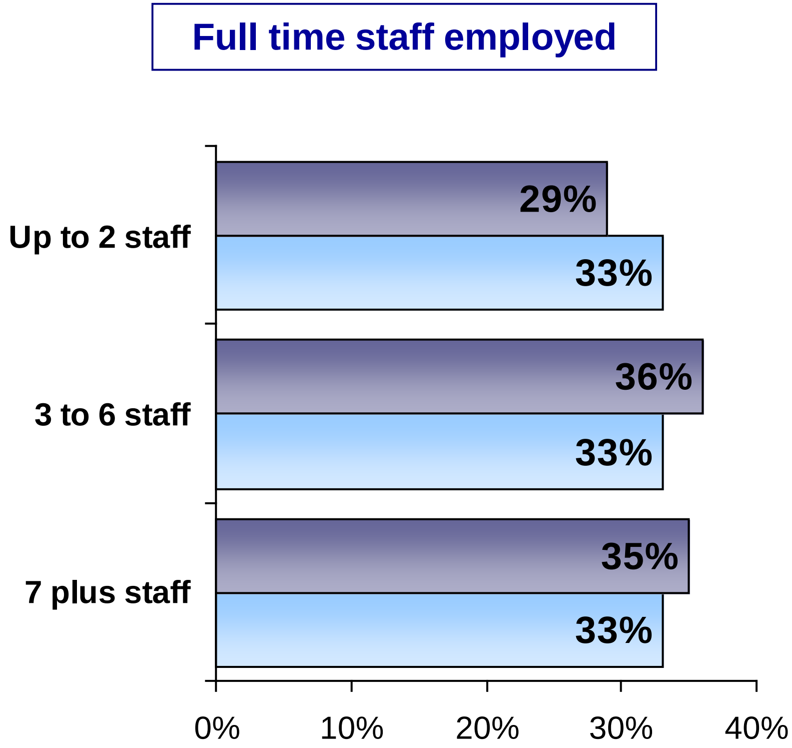
Q26. Answering yes or no, which of the following describes you?

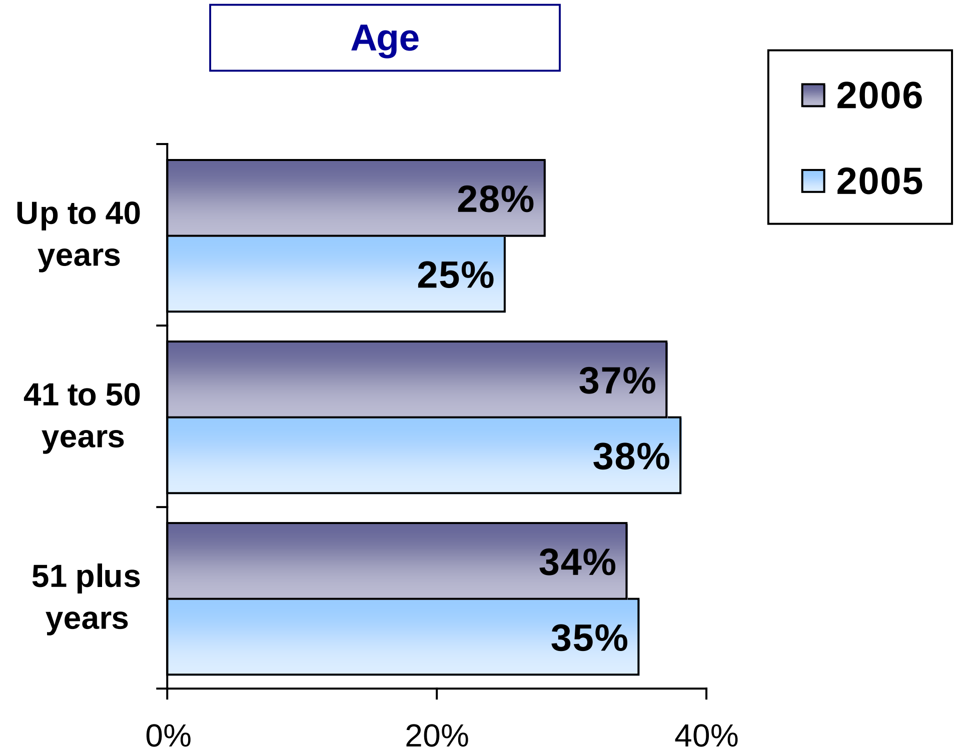
2006 Base: n=130 (All respondents)

2005 Base: n=201 (All respondents)

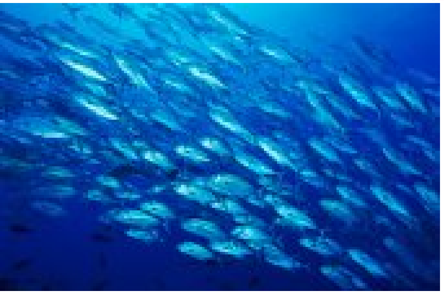
**New statement in 2006*

Profile of Respondents





Q27. How many full time equivalent staff are employed in your business or organisation?
Q28. What is your approximate age?
2006 Base: n=130 (All respondents)
2005 Base: n=130 (All respondents)



Major Highlights

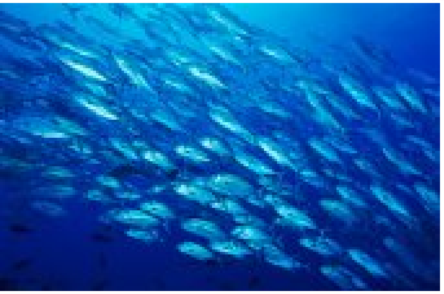
Major Highlights

- Overall awareness of FRDC is very high, with industry associations continuing to be a significant contributing factor to the high recognition levels. To a lesser extent, industry newsletters and publications have helped to generate awareness of FRDC.
- Stakeholders claim to have good knowledge of FRDC’s core role, which encompasses the management and administration of funding for R&D, and the conduct of R&D in fishing and aquaculture.
- FRDC’s performance ratings remain strong and the organisation is strongly commended for conducting worthwhile research, as well as their level of involvement in projects. As with findings in 2005, ratings varied to some extent across industry segments.
- Performance levels have improved since 2005, and a considerable increase of positive performance aspects was mentioned this year….*achieved KPI target recommended in 2005.*
- Most of the stakeholders surveyed claim to financially contribute to fisheries R&D activities, with many also aware that their contribution goes toward supporting FRDC R&D projects.
- Direct benefits related to funding and breeding program initiatives has increased in significance this year, with many stakeholders claiming to have experienced better products, greater efficiency, and improved knowledge and awareness as a result.
- Issues impacting on stakeholders’ own business that were of increased concern this year included a lack of disease research / management, current quota systems, and a lack of breeding research.

Major Highlights

- Strong awareness of Seafood Services Australia is evident, but overall knowledge of their core role is limited, with many unable to confidently rate their performance.
- Stakeholders regard Industry Associations as a vital source of business related matters, particularly for up to date fishing industry information and government legislation / regulations. They are also the main point of contact when stakeholders are considering conduct of R&D.
- “R&D News” is widely distributed, with a large majority of stakeholders on the mailing list. The publication is rated highly and is well regarded as a means of keeping abreast with industry happenings, with many keen to recommend it to others in the industry. However, some still feel that it needs to become a “more interesting read” and that the detail, length, and technical aspects could be improved.
- A high number of business operators are conducting their own R&D, with many funding the research themselves rather than sourcing from FRDC or other research investors. The main types of R&D undertaken are growth trials, feed trials, and identification of new markets.
- A significantly higher proportion of stakeholders claim FRDC is spoken of more highly currently….*close to achieving KPI target recommended in 2006.*
- The vast majority continues to be concerned with the long term prospects of the Australian fisheries sector, and strongly value on-going R&D and financial contributions.

Key Insights



Awareness, Knowledge & Understanding of FRDC

Unprompted awareness of FRDC has not really moved since 2005

Organisation aware of - unprompted mentions	**2006**	**2005**
Base (n=)	*130*	*201*
FRDC	**48%**	**47%**
Sardi	5%	1%
Department of Agriculture / Department of Primary Industries	2%	1%
Federal Government	2%	-
AFMA / Australian Fishing Management Authority	2%	-
TORC / Tasmanian Oyster Research Body	2%	-
Very close to FRDC	1%	3%
CSIRO	1%	1%
State Fisheries Managers	1%	-
Other	11%	7%
Don't know	25%	37%

- As with the previous wave's results, almost half of the respondents surveyed spontaneously identified FRDC (48%).
- A quarter could not nominate any organisation responsible for fisheries R&D (25%).

Q1. Do you know the name of the organisation responsible for investing in national fisheries research and development?

Total recognition is very high, with nine in ten aware of FRDC (prompted and unprompted)

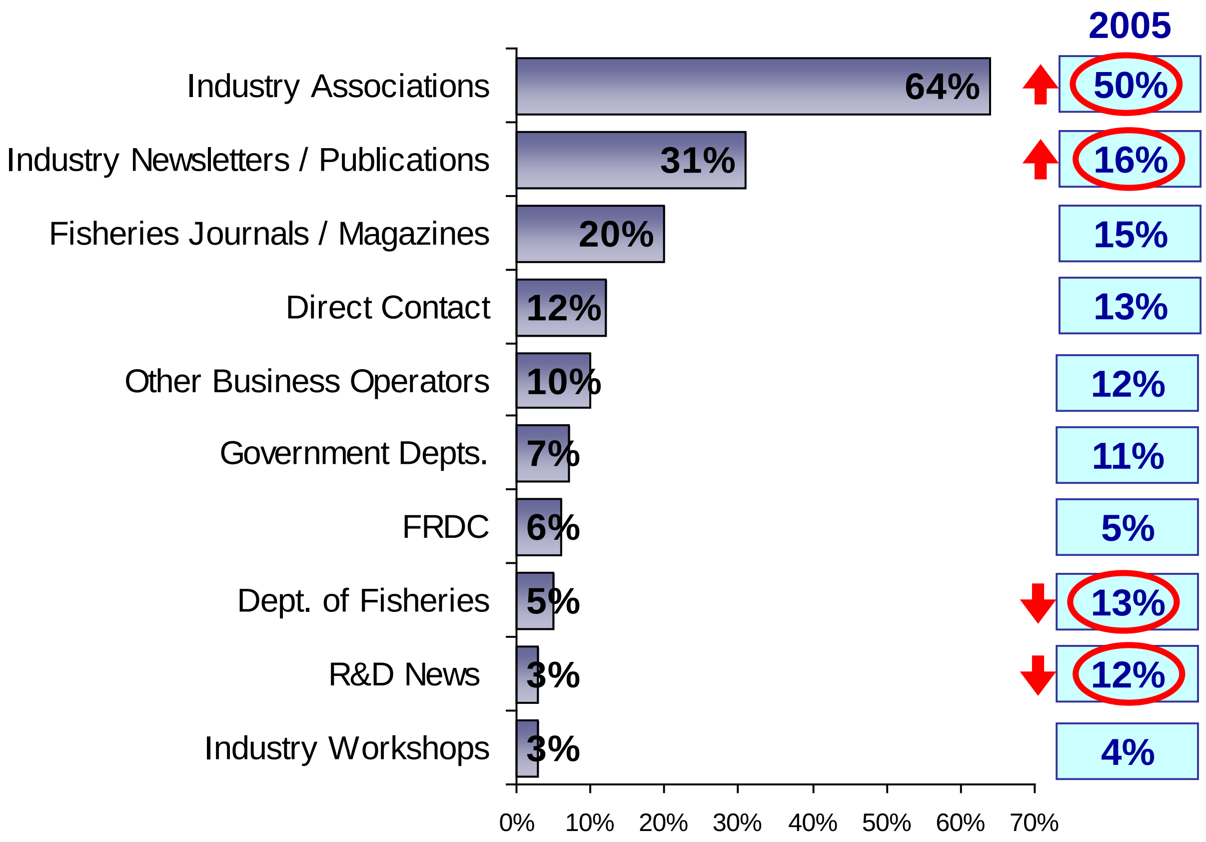
Aware of FRDC	2006		2005	
	Yes - Unprompted	***Yes - Prompted***	***Yes - Unprompted***	***Yes - Prompted***
Total	**48%**	**43%**	**47%**	**40%**
Grassroots	44%	50%	48%	40%
Post Harvest	44%	31%	15%	54%
Recreational Fishing	91%	8%	88%	12%
Other	40%	60%	50%	50%

- When prompted, a further 43% claim to be aware of FRDC.
- Total awareness of FRDC has increased slightly since 2005, from 87% to 92% in 2006.
  - Grassroots – 94%
  - Post Harvest – 75%
  - Recreational Fishing – 100%
  - Other – 100%
- Higher awareness is more prominent in South Australia than New South Wales.

Q1. Do you know the name of the organisation responsible for investing in national fisheries research and development?
Q2. Before this interview, had you heard of Fisheries Research and Development Corporation or FRDC?
2006 Base: n=130 (All respondents). 2005 Base: n=201 (All respondents)

Industry associations are most helpful in generating awareness of FRDC

Sources of awareness of FRDC – main mentions



- Almost two-thirds are aware of FRDC and its activities through industry associations such as the Abalone Industry Association and Australian Prawn Farmers Association (64%).
- Publications such as industry newsletters (31%) and fisheries journals and magazines (20%) are also cited as sources.
- The Department of Fisheries (5%) and R&D News (3%) received less mentions this year.

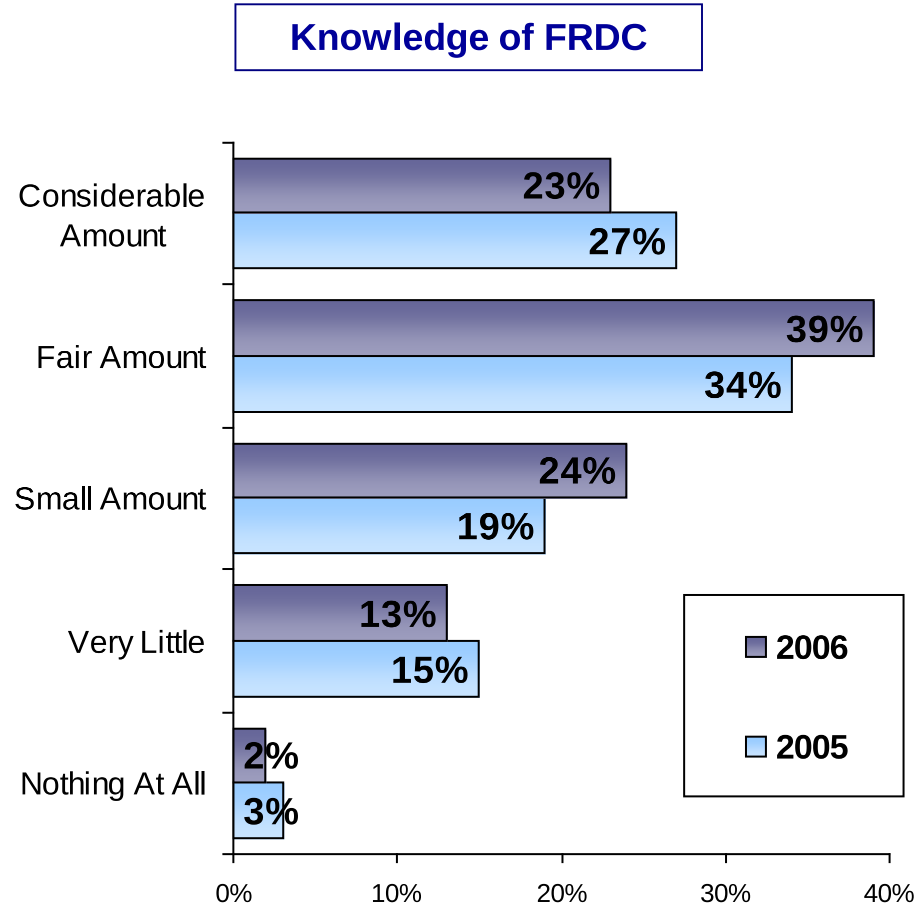
Q5. Who or which sources have helped you become aware of the FRDC and its activities?

2006 Base: n=117 (Have knowledge of FRDC activities)

2005 Base: n=168 (Have knowledge of FRDC activities)

**Main responses listed.*

Stakeholders claim to have good knowledge of FRDC's activities, but no more so than in 2005

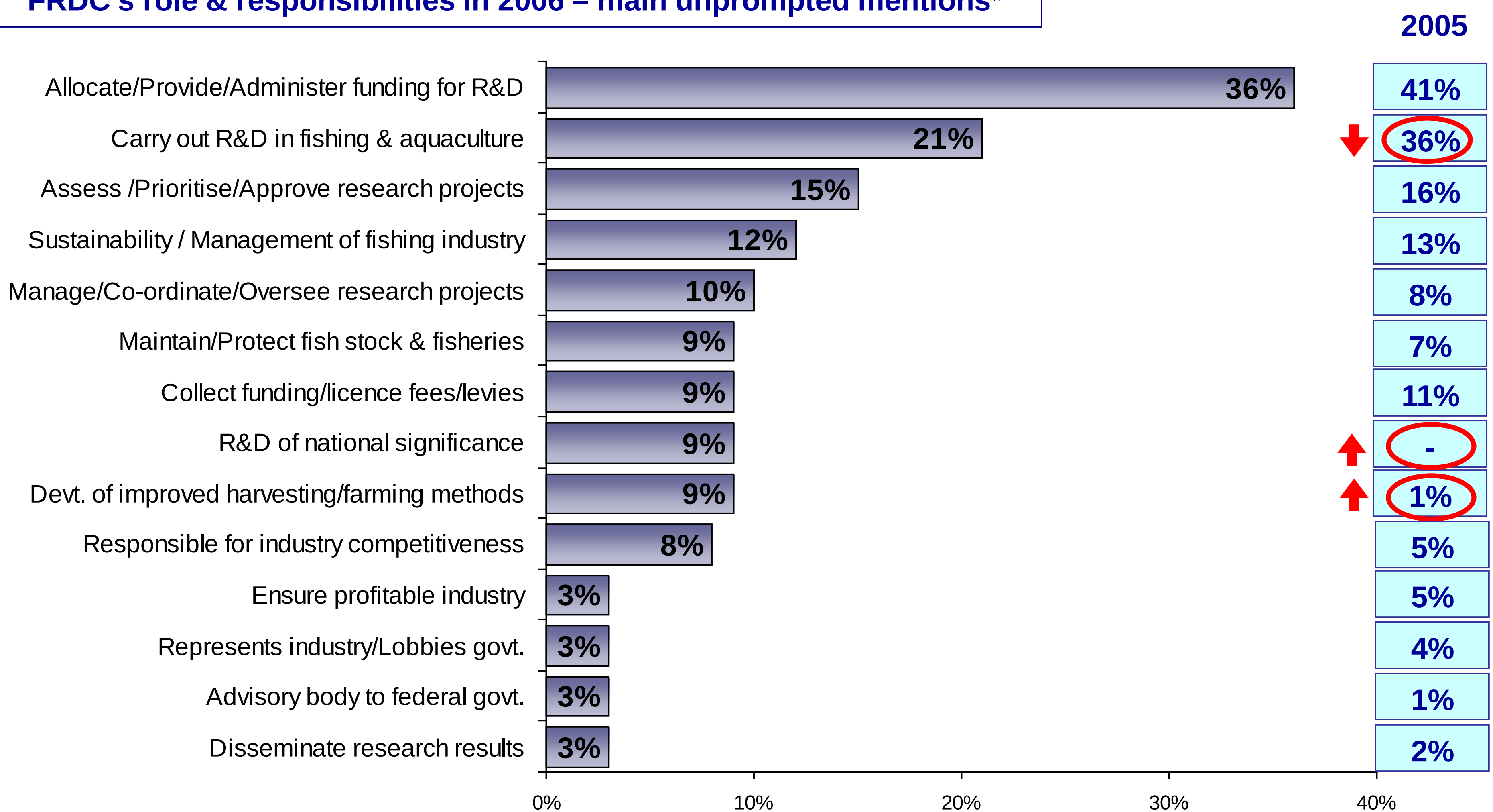


- Of the stakeholders who are aware of FRDC (unprompted and prompted), 62% claim to have a *fair* to *considerable* level of knowledge about what FRDC does.
- Notably higher mentions are evident amongst:
  - Recreational Fishing respondents (92%).
  - Those actively involved in industry associations (67%).

Q3. How much would you say you know about what FRDC actually does? Would you say a…?
2006 Base: n=119 (Total aware of FRDC – Unprompted & Prompted)
2005 Base: n=175 (Total aware of FRDC – Unprompted & Prompted)

Main understanding of FRDC's role is to allocate, provide or administer funding for R&D

FRDC's role & responsibilities in 2006 – main unprompted mentions*



Q4. What is your understanding of FRDC's role and responsibilities?

2006 Base: n=117 (Have knowledge of FRDC activities). 2005 Base: n=168 (Have knowledge of FRDC activities)

**Main responses listed.*

Main understanding of FRDC's role is to allocate, provide or administer funding for R&D

- More than a third (36%) of those surveyed understand FRDC's role is to allocate, provide, or administer funding for R&D.
- This was followed by just over two in ten who mentioned FRDC was responsible for carrying out R&D in fishing and aquaculture industries (21%).
  - Significant decrease since 2005 (36%).
- FRDC's role in the development of improved fish harvesting and farming methods has increased notably from 1% in 2005 to 9% currently.
- Mentions of "maintain and protect fish stock and fisheries" was higher amongst Wild Catch operators (16%).
- Whilst Aquaculture operators are more likely to indicate FRDC is responsible for managing, coordinating, and overseeing research projects (17%).

Q4. What is your understanding of FRDC's role and responsibilities?

2006 Base: n=117 (Have knowledge of FRDC activities)

2005 Base: n=168 (Have knowledge of FRDC activities)

Main understanding of FRDC's role – some verbatim comments

*"To assist the industry in maintaining **ongoing sustainability**."*

*"To invest in research to **forward** the fishing industry and national **research priorities**."*

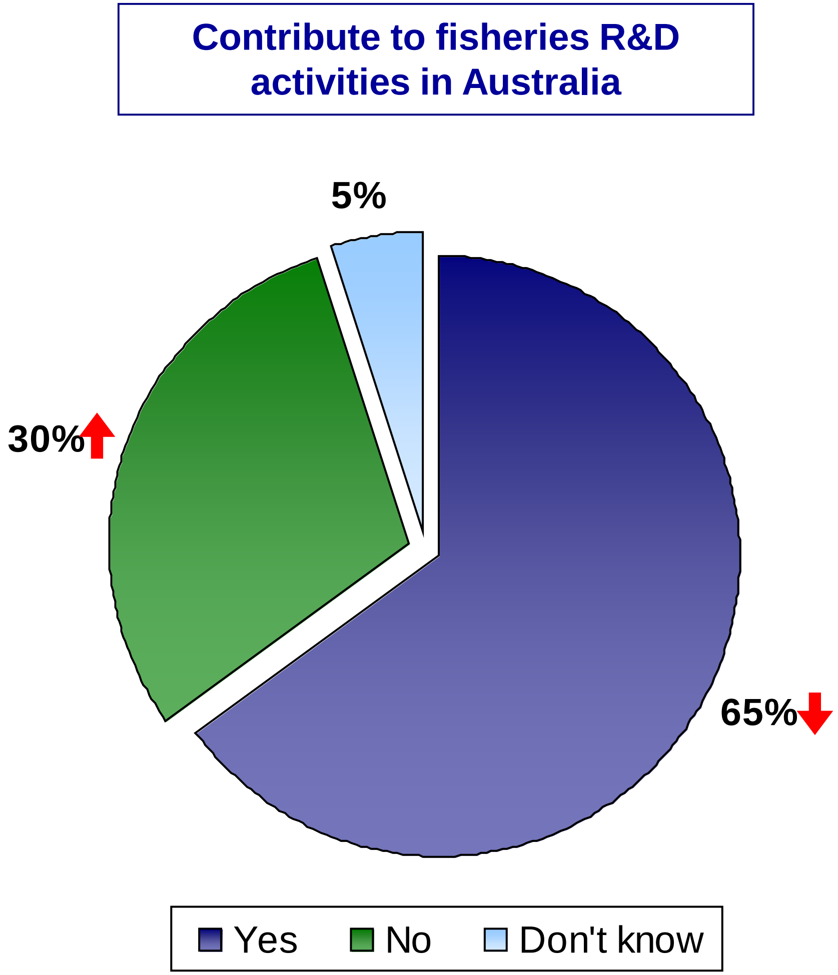
*"To look at the seafood industry as a resource with a **view to sustainability** in the long term."*

*"**Assess** projects for research and development into the fishing industry and **monitor** that research."*

*"They're responsible for **coordinating and making decisions** on the best use of funds for the research and development for the fishing industry in Australia."*

*"An advisory body and **allocates funding** to certain research and development projects."*

A healthy majority contribute to fisheries R&D activities

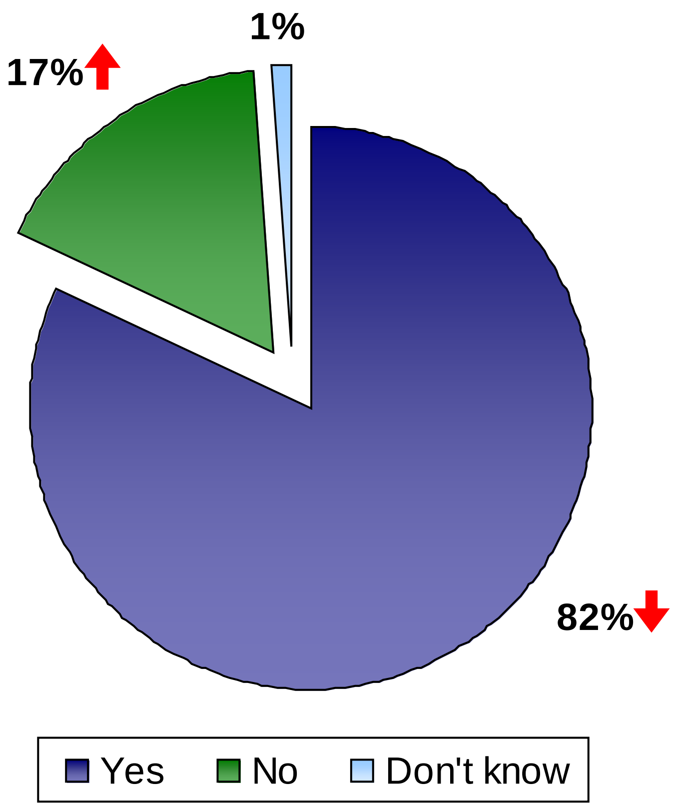


- Almost two-thirds of stakeholders claim to contribute towards fisheries R&D in Australia (65%).
  - This represents a decrease of six percentage points since 2005 (71%).
  - The level of non-contributors has increased from 23% to 30% in 2006.
- Significantly higher mentions are evident amongst grassroots respondents (78%).

Q8. Do you contribute towards fisheries R&D activities in Australia?
2006 Base: n=130 (All respondents)
2005Base: n=201 (All respondents)

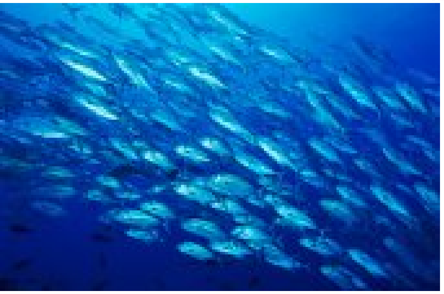
Stakeholders continue to be highly aware that the contribution funds FRDC's R&D projects

Aware that contribution assists in funding FRDC R&D investments



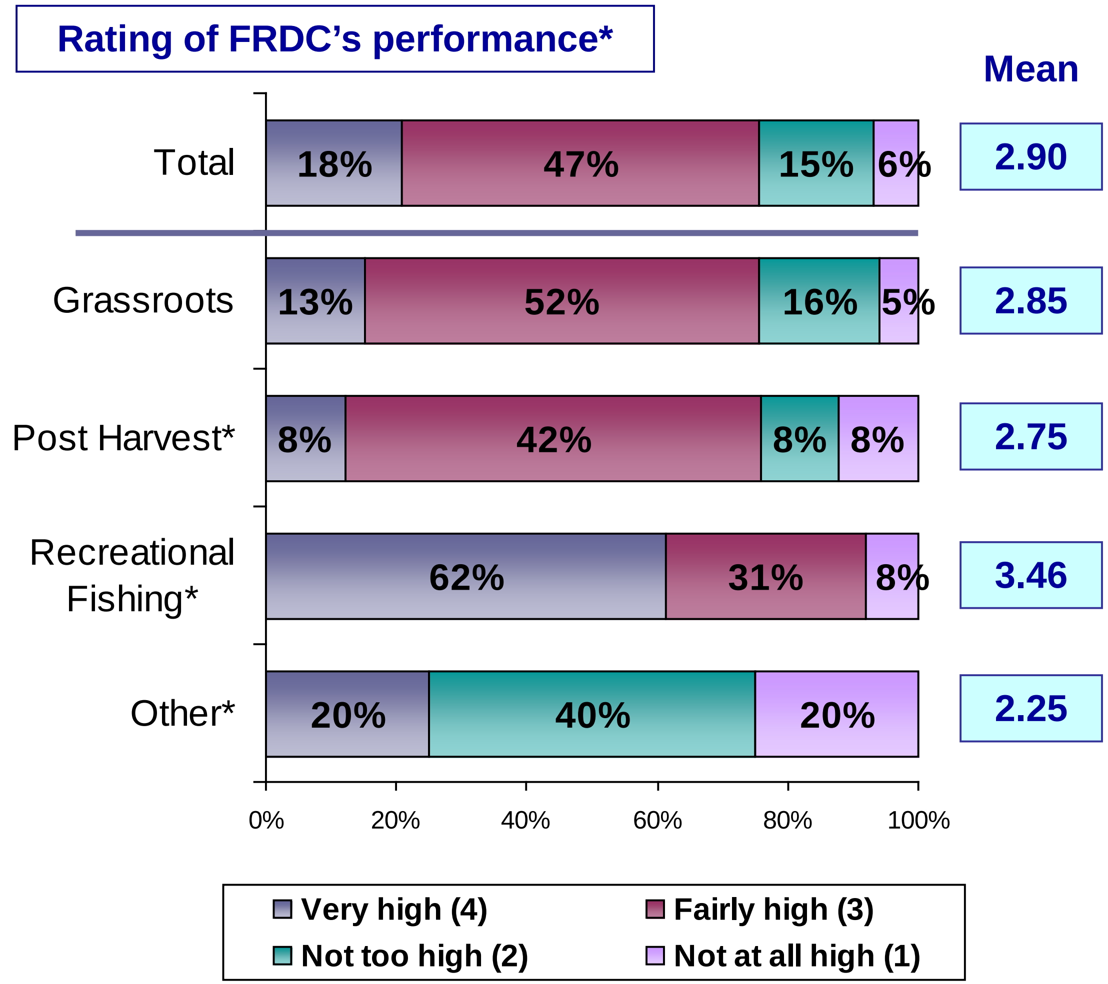
- Of those who contribute towards fisheries R&D in Australia, a vast majority are aware that the contribution assists in funding FRDC's R&D investments.
  - Slight decrease in awareness since 2005, from 85% to 82%.

Q9. Are you aware that this contribution assists in funding R&D investments made by the FRDC?
2006 Base: n=78 (Contribute to fisheries R&D in Australia)
2005 Base: n=124 (Contribute to fisheries R&D in Australia)



Rating of FRDC's Performance

Overall performance ratings have improved somewhat in 2006



- Those who are aware of activities undertaken by FRDC predominantly rated highly its performance as a funder of fisheries R&D (65%).
  - Overall high ratings have increased since 2005, from 58% to 65%.
- Significantly higher ratings are prominent amongst those actively involved in industry associations (70%).

Q6. Overall, how would you rate the FRDC as a funder of fisheries R&D? Would you say…

2006 Base: n=117 (Have knowledge of FRDC activities)

2005 Base: n=168 (Have knowledge of FRDC activities)

**Indicative results due to small sample bases. Excludes "don't know" responses.*

FRDC is seen to be conducting worthwhile research, but greater R&D focus is required

*Reasons for rating - main unprompted mentions**	2006	2005
Base (n=)	*100*	*139*
Net Positive	**73%**	**64%**
Worthwhile research	25%	15%
Level of funding	12%	20%
Addressing priority / target issues	12%	12%
Number of projects involved with / Amount of work done	12%	-
Good reports / dissemination of results	10%	6%
Effectively distribute funds	9%	5%
Assist in advancing industry	9%	9%
Net Negative	**24%**	**38%**
Irrelevant research	10%	17%
Funding distribution concerns	10%	10%
Lack of focus on needed research areas / areas of research ignored	9%	-
Lack of communication	3%	4%
Does not add value	3%	-

- Overall positive comments about FRDC's performance has increased from 64% in 2005 to 73% currently.
- Stakeholders regard FRDC to be of value to the industry through conduct of worthwhile research. Favourable comments are also evident in relation to funding, strategic role, and dissemination of R&D results.
- Unfavourable mentions have decreased notably in 2006, from 38% to 24%.
  - Potential to provide greater focus on R&D and value adding.

Q7. Why do you rate the FRDC…?

2006 Base: n=100 (Have knowledge of FRDC activities. Excludes respondents who did not give any rating)

2005 Base: n=139 (Have knowledge of FRDC activities. Excludes respondents who did not give any rating)

**Respondents could have nominated more than one positive and/or negative mention. Main mentions only.*

Rating of FRDC's performance – some positive verbatim comments

"They are very focused in outcomes and they are passionate about what they do."

"They have had some successful projects funded and they are adapting to a fairly fast changing industry."

"The quality of the outputs and the projects they give."

"They focus on industry issues and have a fairly high profile, and they disseminate information in a timely fashion."

"A lot of the research has been really meaningful and has had good results."

"The value of the results and the projects they fund are very good."

"They are trying to further the industry and do what's right by the industry."

Rating of FRDC's performance – some negative verbatim comments

"They are short sighted. Looking for quicker results that can be reasonably expected."

"The money is spent on the wrong areas. The research funds go into areas which aren't important."

"They have their own guidelines and they don't take into account the fisherman and the real issues of the industry."

"I do not feel that they show enough information so the public does not see what we see."

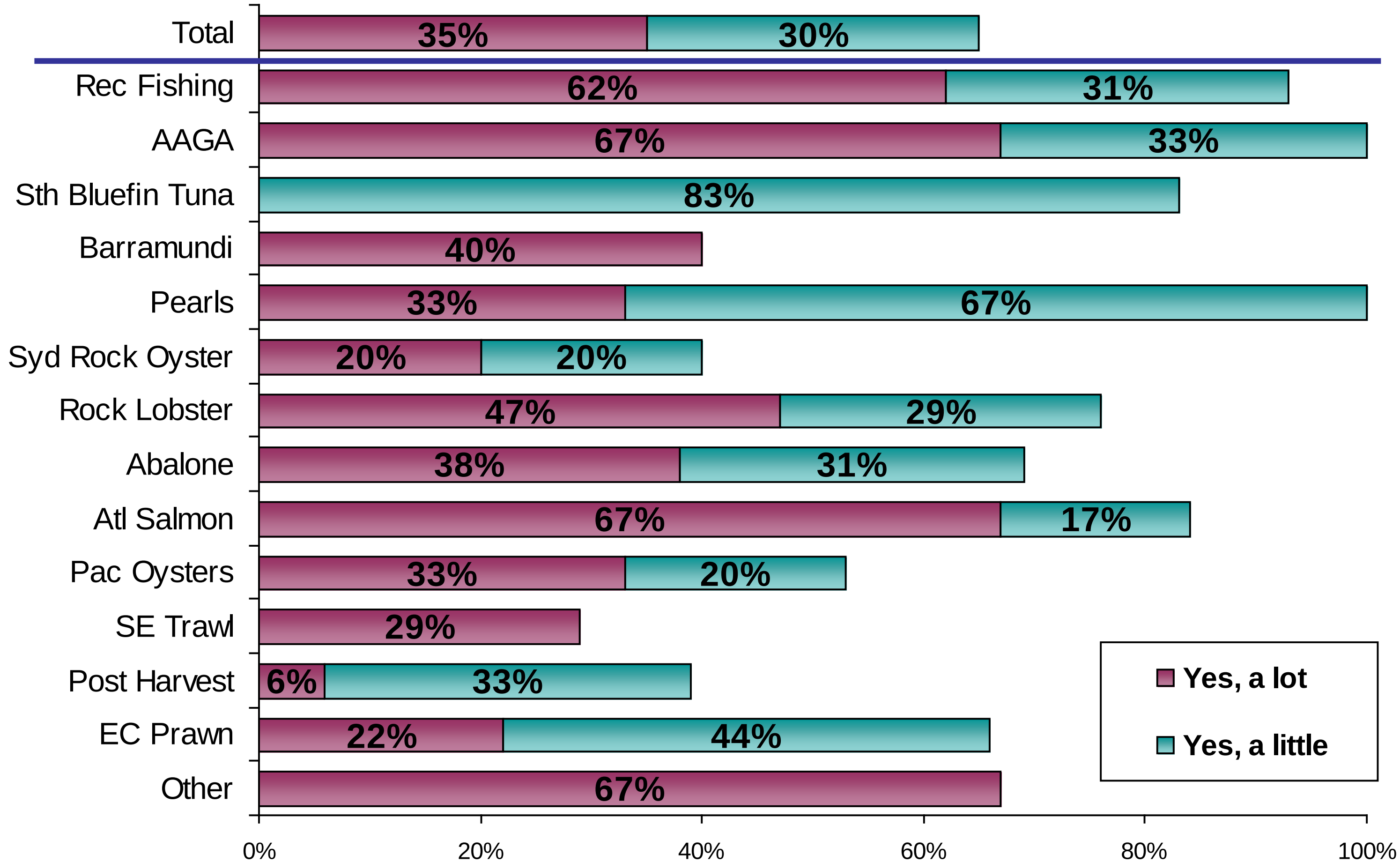
"I do not think they are doing enough for us. They don't come around to ports to talk to the fishermen enough."

"I do not see a lot of results in my sector and I do not really know what they are up to in other sectors."

Perceived Benefits from Fisheries R&D

The majority claim to have experienced direct benefits, but results are low in some areas

Directly benefited from fisheries R&D



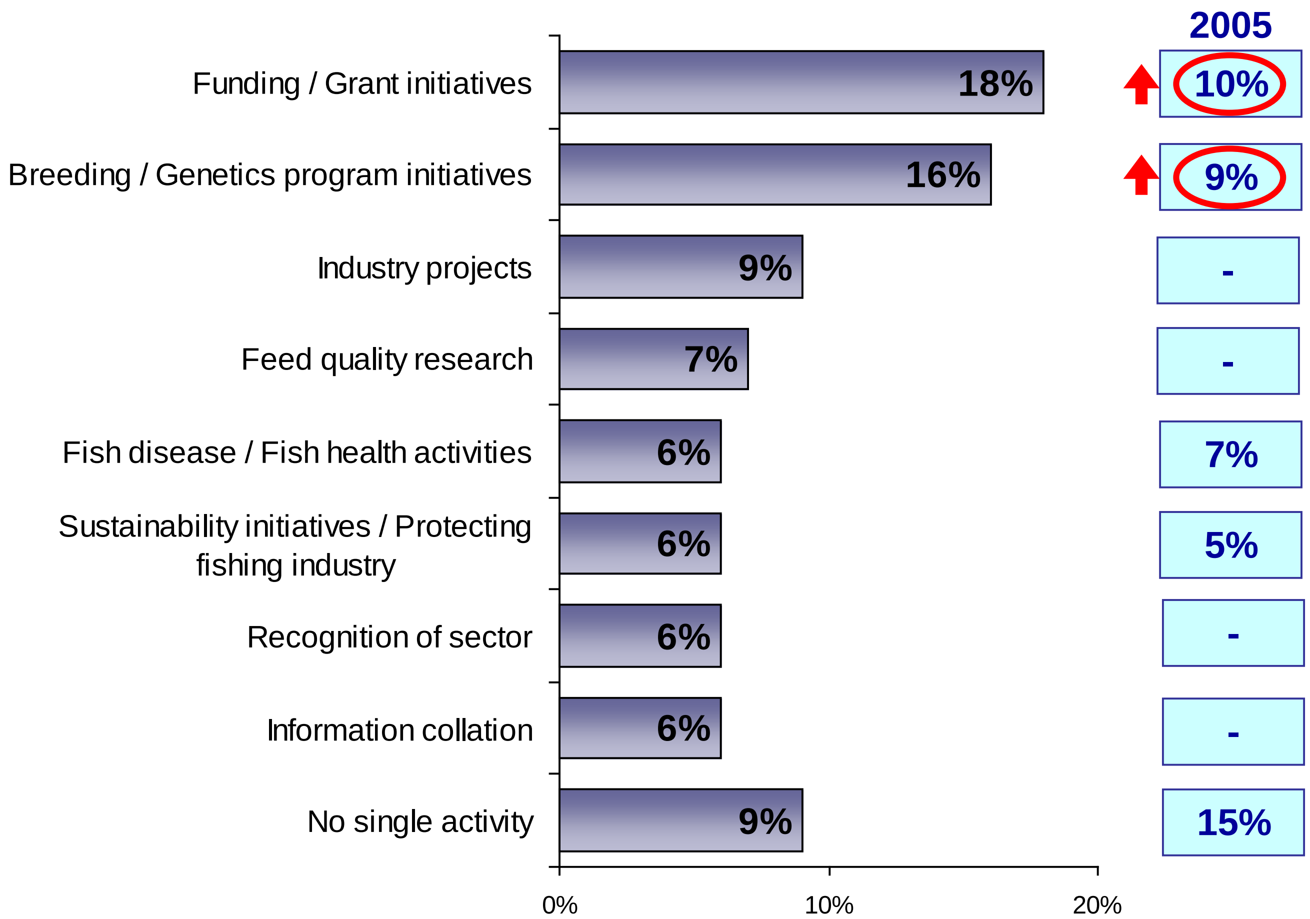
Q10. Do you feel you have directly benefited from fisheries R&D and extension activities or initiatives in general, undertaken in the past 5 years?

Base: n=130 (All respondents)

**Category results indicative due to small sample sizes.*

Claimed increase in significance of funding and breeding initiatives as direct benefits

Most significant activity benefited from – main unprompted mentions*



Q12. What is the one most significant R&D activity or initiative you have directly benefited from as a result of FRDC in the past 5 years?

2006 Base: n=85 (Indicated benefited from fisheries R&D in past 5 years). 2005 Base: n=115 (Indicated benefited from fisheries R&D in past 5 years)

**Main responses only.*

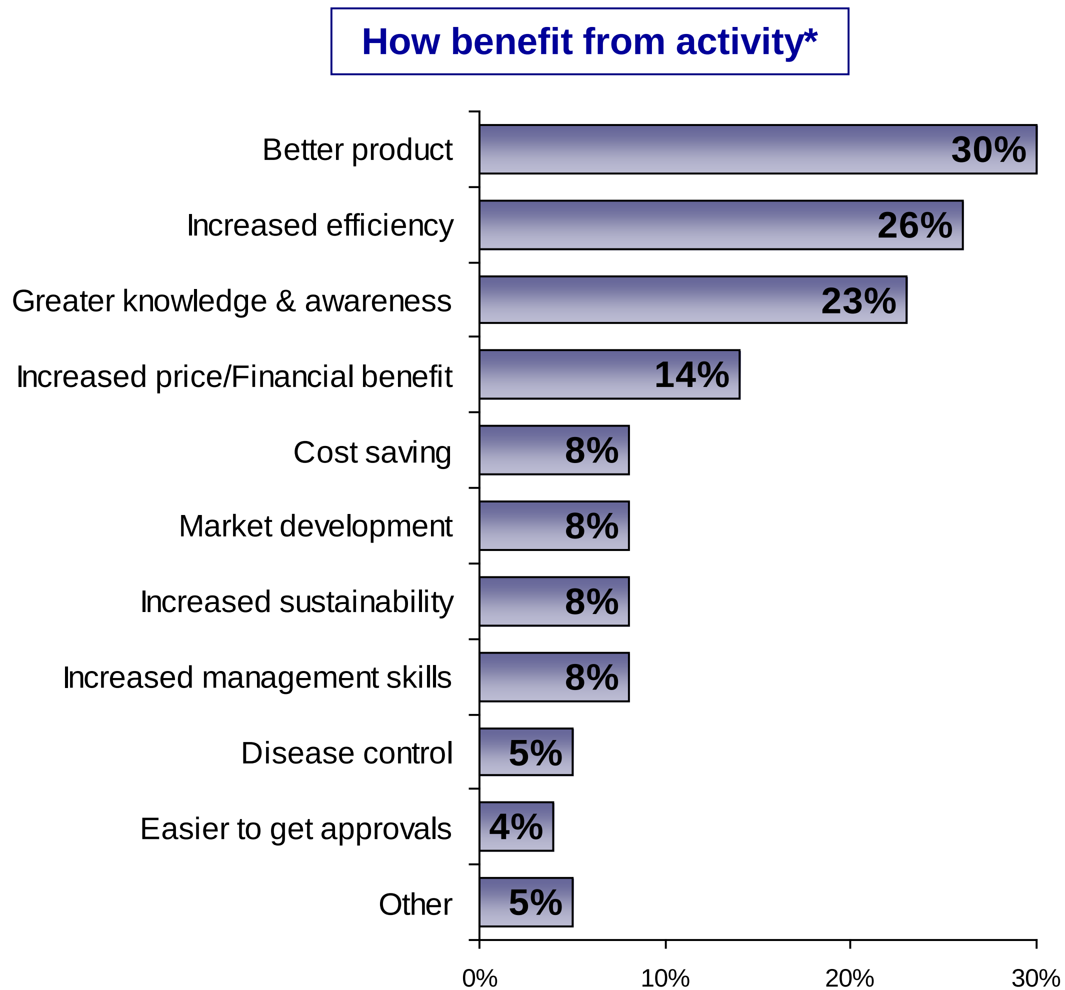
Claimed increase in significance of funding and breeding initiatives as direct benefits

- Stakeholders who have benefited from fisheries R&D in the past five years claim to have experienced gains from:
  - Funding / Grant initiatives (18%)
  - Breeding / Genetics program initiatives (16%)

- Other activities mentioned in smaller proportions include:
  - Fish stock management – 4%
  - Quota management – 4%
  - Hatchery stock/Growth improvements – 4%
  - Environmental/Ecological work – 2%
  - Released fish survival project – 2%
  - Marketing assistance – 2%
  - Sponsored workshops – 2%
  - Spatial scale management – 2%

Q12. What is the one most significant R&D activity or initiative you have directly benefited from as a result of FRDC in the past 5 years?
2006 Base: n=85 (Indicated benefited from fisheries R&D in past 5 years)
2005 Base: n=115 (Indicated benefited from fisheries R&D in past 5 years)

A better product, increased efficiency and greater knowledge are the main benefits experienced



- Amongst those who mentioned an activity or initiative directly benefited from fisheries R&D…
  - 30% experienced benefits through better products;
  - 26% benefited through increased efficiency; and
  - 23% gained greater knowledge and awareness.

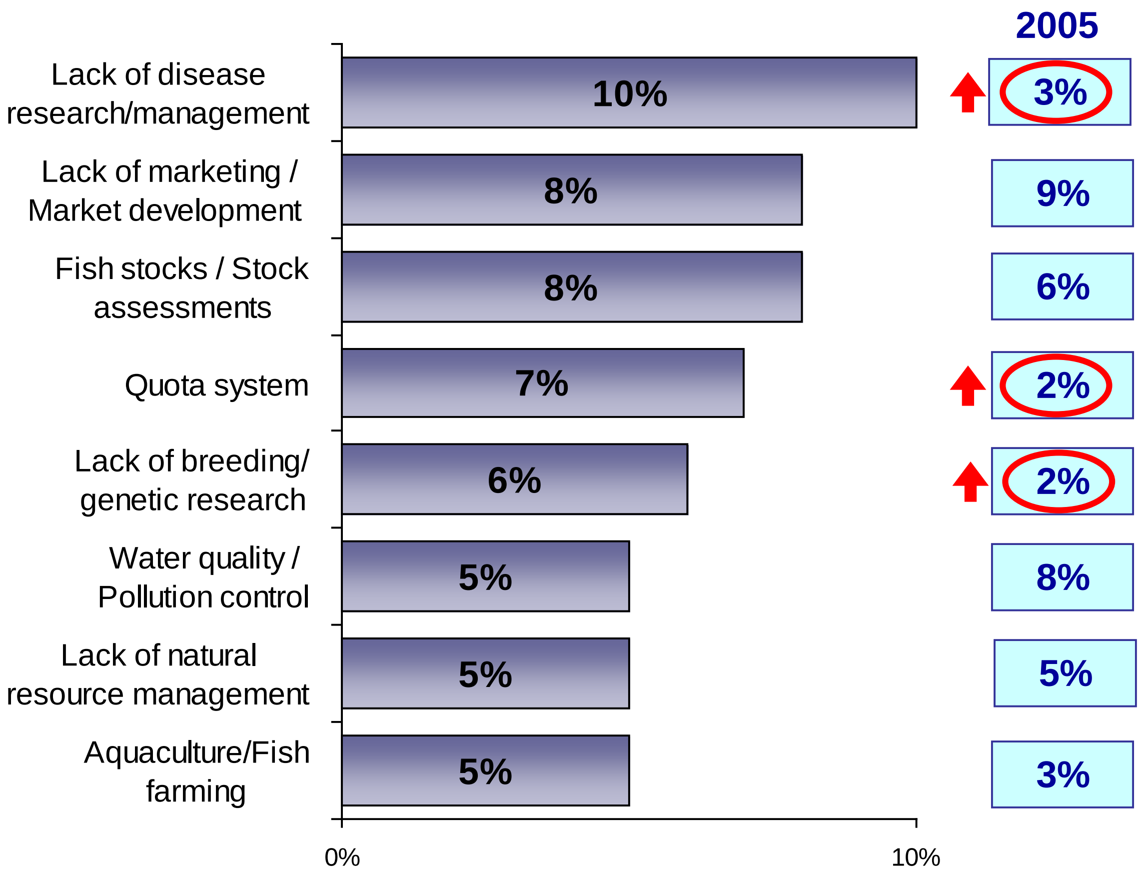
Q12a. How did you benefit from this activity?

Base: n=74 (Indicated activity benefited from fisheries R&D in past 5 years)

**New question asked in 2006.*

Disease research, quota systems and breeding research are of greater importance this year

Issues impacting on business – main unprompted mentions*



- Mentions of a lack of disease research / management has increased significantly since 2005, from 3% to 10%.
- The quota system and lack of breeding research has also increased in significance in 2006.
- Higher mentions of the following issues are evident amongst Aquaculture respondents:
  - Water quality / pollution control (13%).
  - Lack of focus on sustainability / natural resource management (11%).

Q13. Can you mention one issue adversely impacting directly on your business or organisation that you believe has not been researched at all or definitely needs more research?

2006 Base: n=130 (All respondents). 2005 Base: n=201 (All respondents)

**Question wording has changed slightly from 2005. These changes have not altered the meaning of the original question.*

Issues impacting on business – some verbatim comments

*"Our **marketing**. The **Asian markets** should be researched more because they are **critical** to the abalone future."*

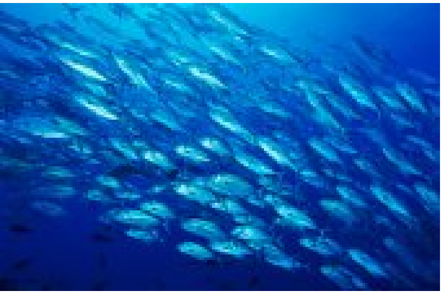
*"**Marketing** the products on an **international scale**. Need research to lobby our products overseas."*

*"**Quota systems**. They impact on my business and the restrictions affect my business and compliance."*

*"The **reduction** of **fishing areas and quota implementation**, and **realistic uses** of by-catch areas."*

*"The effect of the **imported fish** on the local products. Lots of similar products come in as fresh from overseas and are **not necessarily sold** as imported products."*

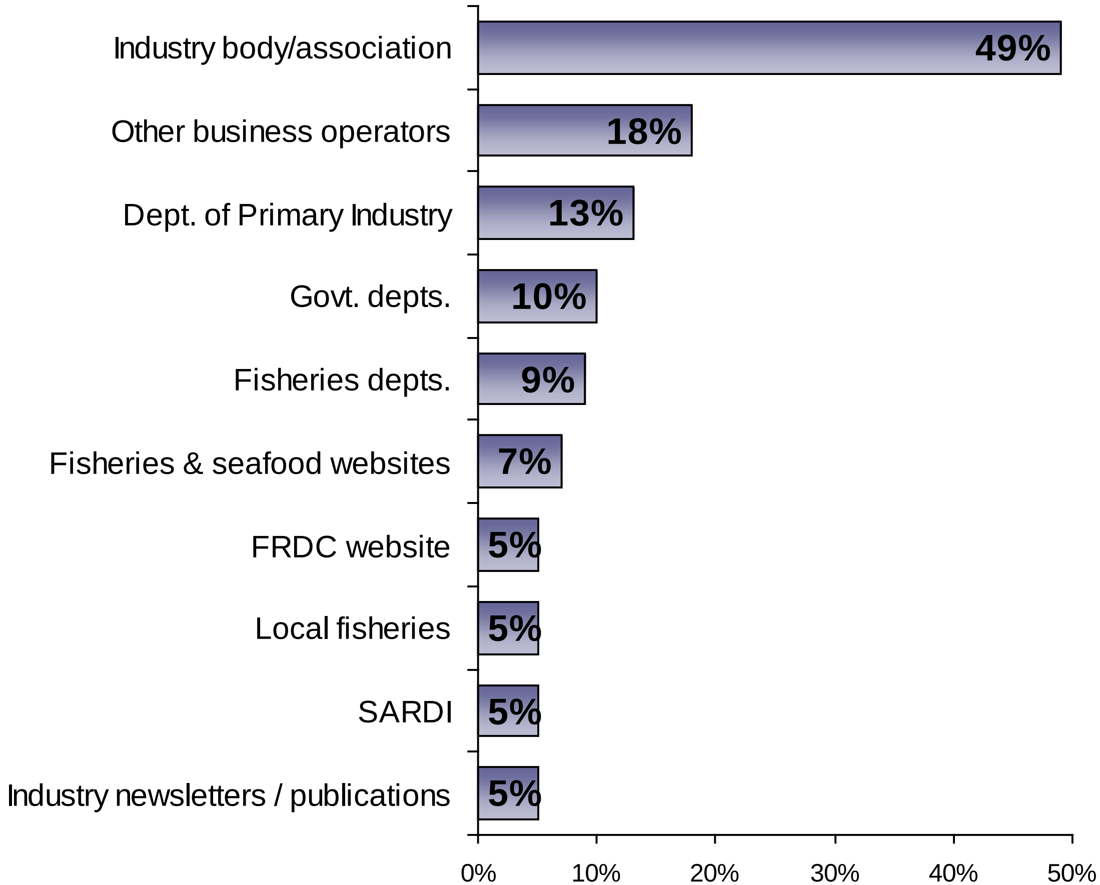
*"**Balancing** imported seafood with domestically caught seafood."*



Information & Communications

Industry associations are an important source of business related information and advice

Point of contact for information or advice*

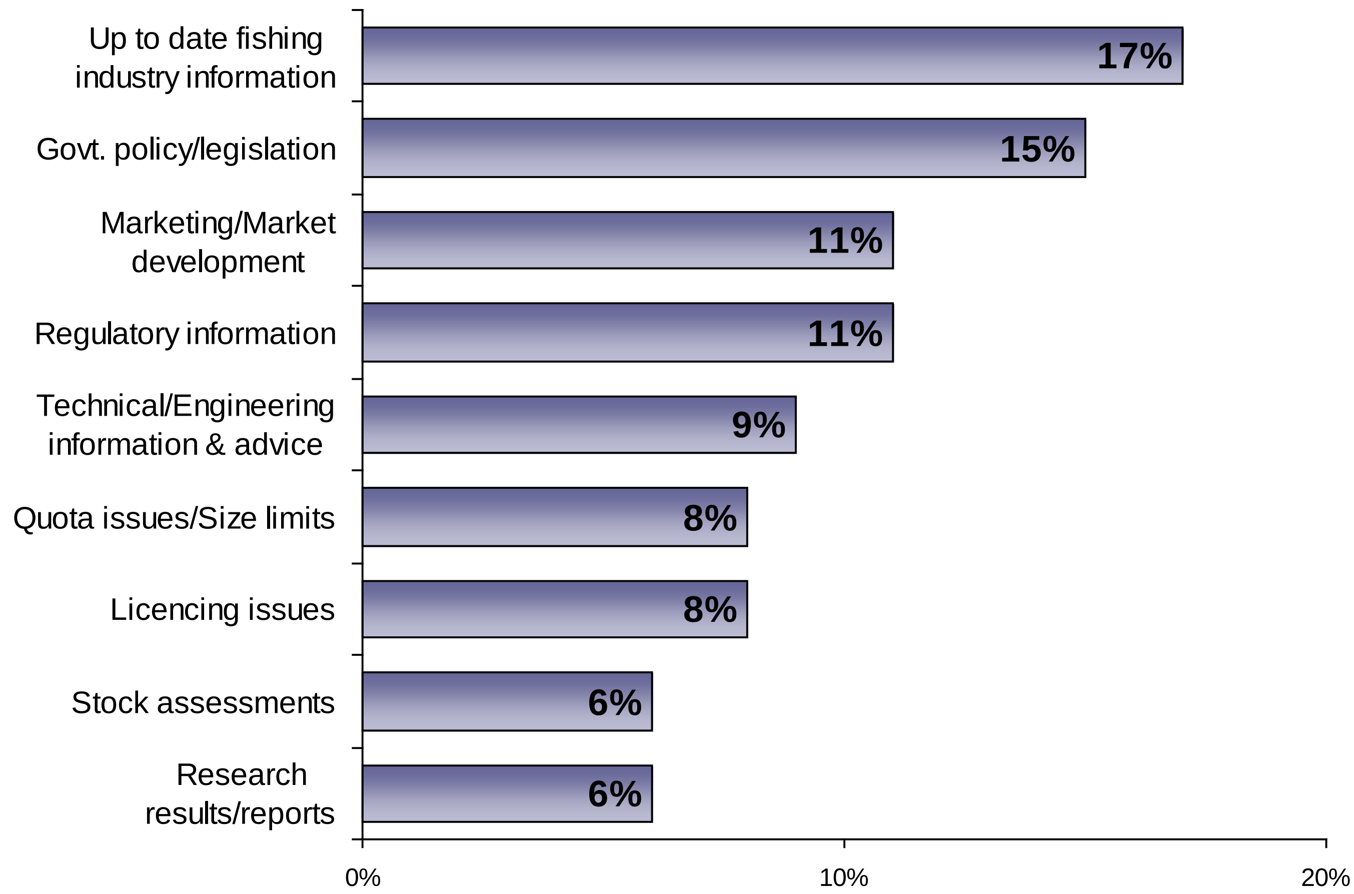


- Just under half of all stakeholders seek business related information and advice from their industry association (49%).
- To a lesser extent, other business operators (18%), the Department of Primary Industry (13%), and other Government departments (10%) are consulted.

Q14a. When seeking information and advice relating to your fishing business, who do you contact or where do you go?
Base: n=130 (All respondents)
New question asked in 2006.
Main mentions only,

Up-to-date industry related information and legislative details are commonly sought

Types of information & advice* - unprompted total mentions



Q14b. What type of information or advice do you seek from these sources?

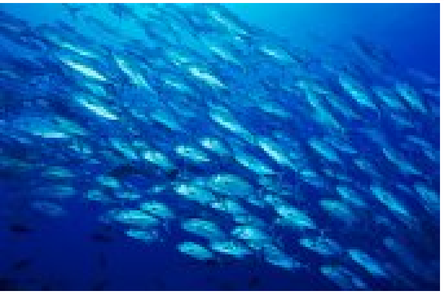
Base: n=130 (All respondents)

**New question asked in 2006. Main mentions only.*

Up-to-date industry related information and legislative details are commonly sought

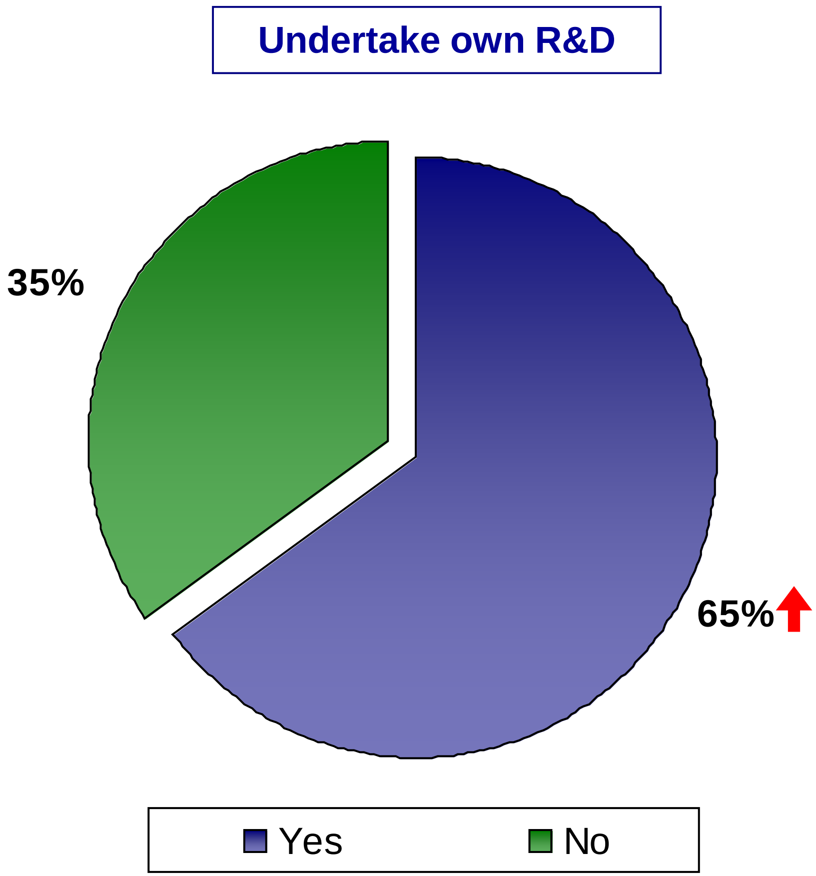
- A wide range of information or advice is sought, with the main ones being up to date fishing industry information (17%), and Government policy and legislation (15%).
- This was followed by marketing and market development information and advice on rules and regulations (11% each).
- Other information or advice was cited by smaller proportions, such as:
  - Disease control – 5%
  - Species information – 5%
  - Forward planning and management – 5%
  - Equipment/Machinery – 5%
  - Fish health and nutrition – 5%
  - Price changes – 5%

Q14b. What type of information or advice do you seek from these sources?
Base: n=130 (All respondents)
**New question asked in 2006.*



Conduct of Own R&D

A considerable proportion undertake their own R&D



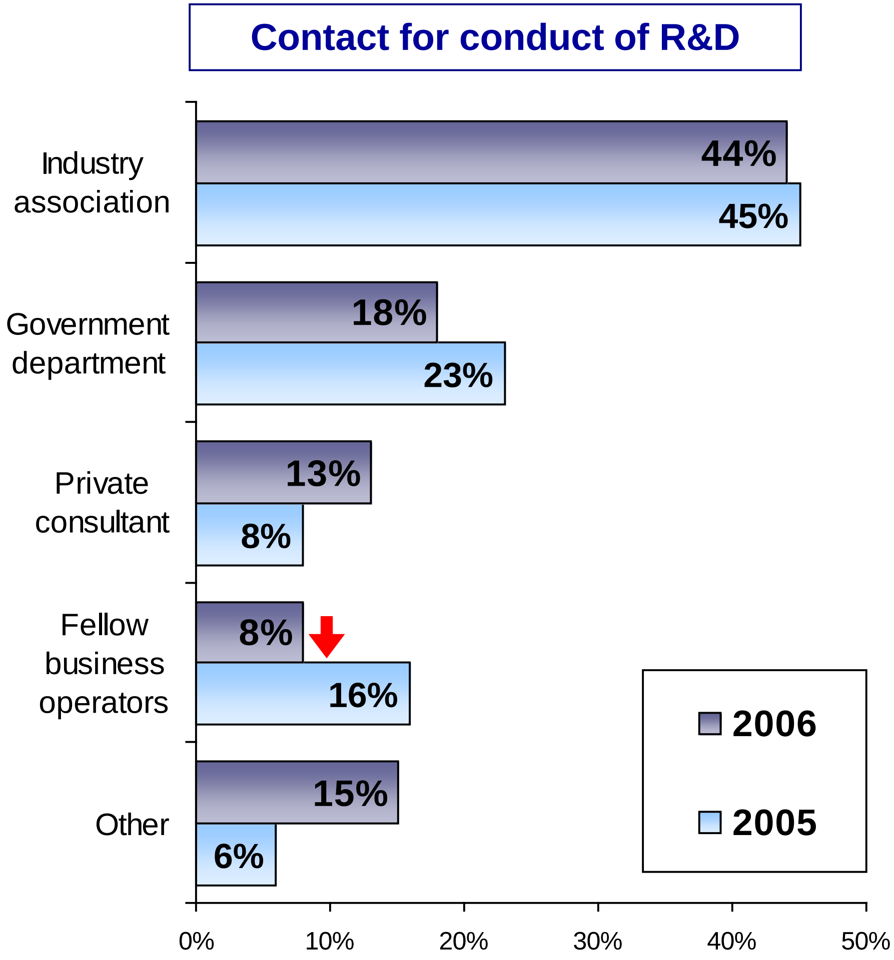
- Almost two-thirds of those surveyed claim to conduct their own R&D (65%).
  - This is an increase of five percentage points since 2005, from 60% to 65%.
- Higher mentions are evident amongst Aquaculture operators (72%).

Q22. Does your business or organisation undertake any of its own R&D?

2006 Base: n=130 (All respondents)

2005 Base: n=201 (All respondents)

Industry associations are the main point of contact for the conduct of research



- Over four in ten nominated industry associations as the main point of contact if they were looking to undertake research (44%).
- A slightly higher proportion would seek the advice of a private consultant.
- Whilst advice from fellow business operators is not as highly valued for some - down from 16% to 8% in 2006.

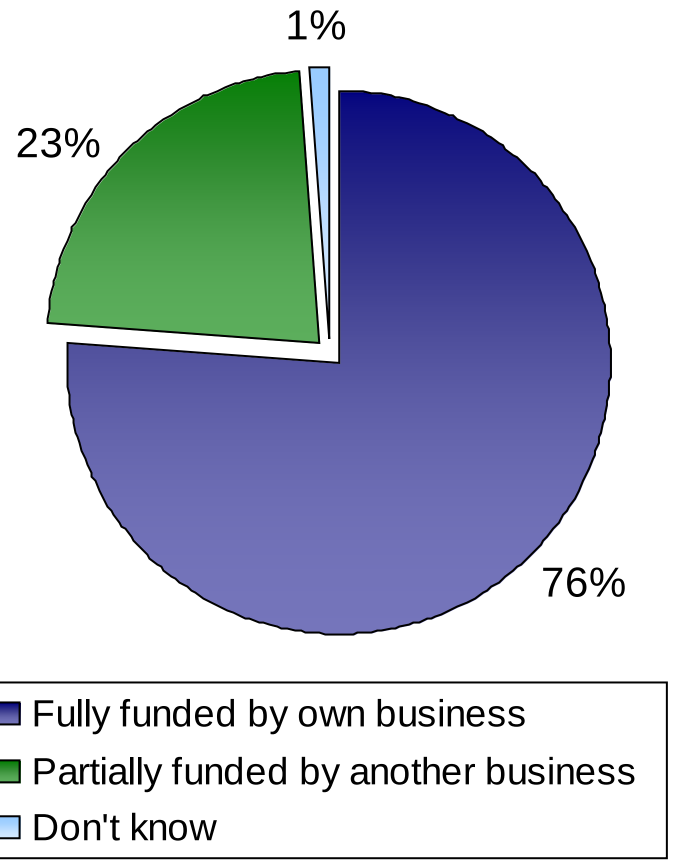
Q21. If you were looking to have research conducted for your business or organisation, who would you be most likely to contact to do the research? Would it be…

2006 Base: n=130 (All respondents)

2005 Base: n=201 (All respondents)

A large majority of research is fully funded by the stakeholder's own business

Who research funded by*



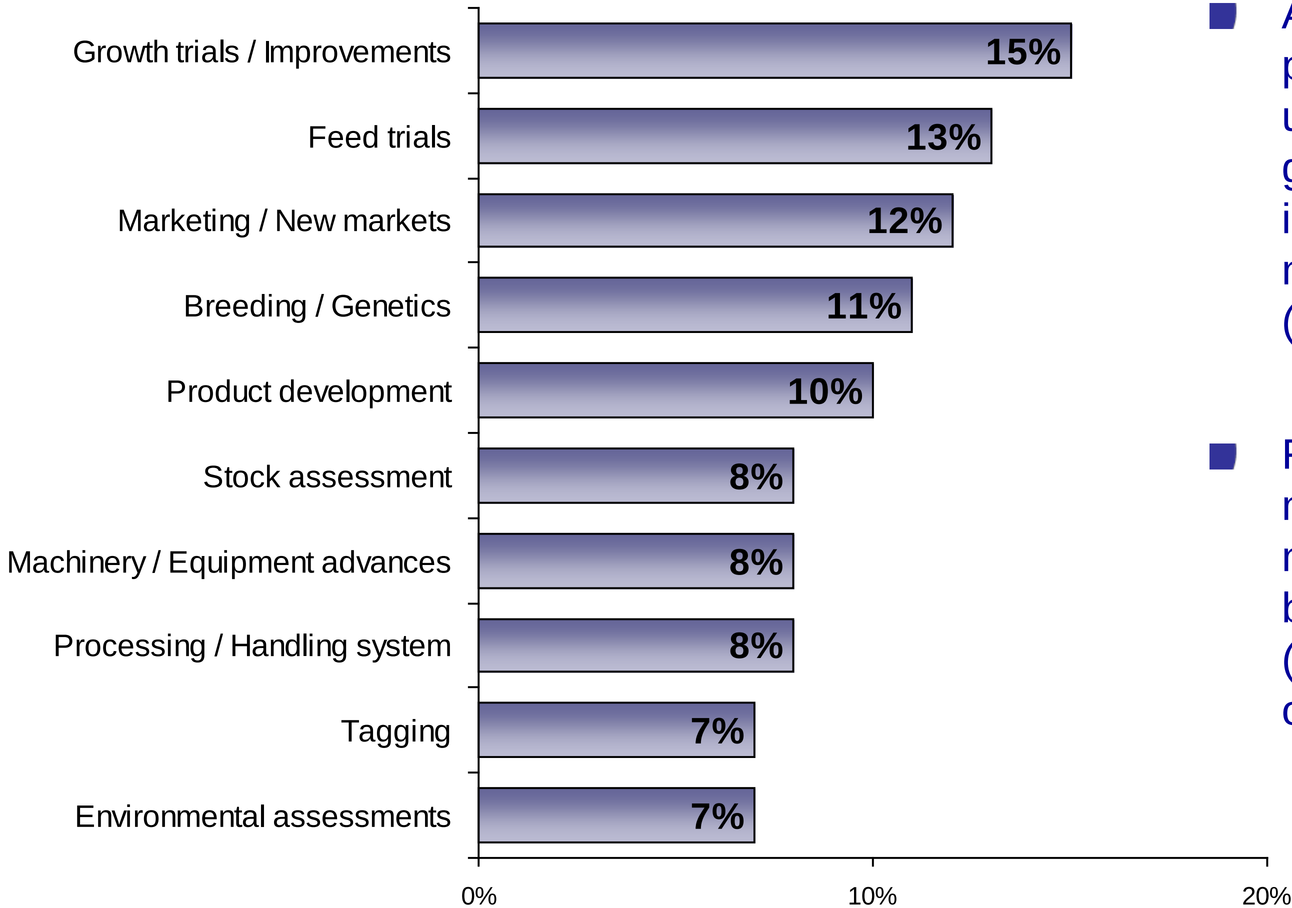
Q22a. Is this research funded by your organisation or another?

Base: n=84 (Conduct own R&D)

**New question asked in 2006.*

Growth trials or improvements are the main type of R&D undertaken by stakeholders

Types of R&D undertaken* - total unprompted mentions



- A myriad of R&D projects were undertaken, with growth trials and improvements the most mentioned (15%).
- Feed trials (13%), marketing / new markets (12%), and breeding / genetics (11%) are other areas of R&D conducted.

Q22b. What type of fisheries R&D have you undertaken?

Base: n=84 (Conduct own R&D)

**New question asked in 2006. Main mentions only,*

Higher claims of self funding compared to 2005

*Organisations assisted with R&D funding**	2006	2005
Base (n=)	*130*	*201*
Self funded	**19%**	1%
Government Department	5%	-
FRDC	4%	3%
Federal Government	4%	2%
SARDI	4%	2%
Universities (Syd, Canberra, Sth Coast)	3%	3%
State Government	2%	4%
Aus Industry	2%	4%
Dept. of Primary Industry	2%	3%
Sarlac	2%	<1%
CSIRO	2%	1%
CRC	2%	1%
No research undertaken	12%	-
Never applied / received funding	**25%**	1%

- In comparison to 2005, a higher proportion of those surveyed claim to have funded past R&D themselves.
- A quarter indicated they have never applied or received funding from external organisations.

Q24. Can you possibly tell me the names of the organisations who have provided you with R&D funding in the past?

2006 Base: n=130 (All respondents)

2005 Base: n=201 (All respondents)

**Question wording has changed slightly from 2005. These changes have not altered the meaning of the original question.*

**Main mentions only.*

Attitudes & Mindset

There is a significant increase in the proportion who now regard FRDC more favourably

Attitudes and behaviour attributes - level of agreement	2006		2005	
	Net agree	*Net disagree*	*Net agree*	*Net disagree*
It is important that FRDC interacts more with stakeholders throughout the fisheries supply chain	92%	7%	92%	4%
I am concerned with the long term outlook of the Australian fisheries sector	81%	14%	80%	17%
It is very important that I make a financial contribution to R&D in the Australian fisheries sector	72%	26%	74%	17%
Getting R&D funding is very difficult for businesses and organisations like ours	60%	22%	60%	14%
FRDC is spoken of highly by people, businesses, or organisations that I talk to	57%	28%	45%	29%
I feel that R&D in the Australian fisheries sector does not have a positive impact on my business or organisation	33%	59%	39%	53%

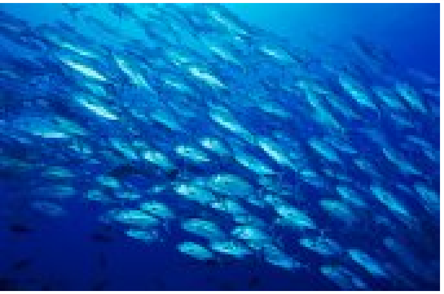
Q25. Do you agree or disagree with the following statements? Is that a lot or a little?
2006 Base: n=130 (All respondents)
2005 Base: n=201 (All respondents)
**Some statements have been deleted from the original question in 2005.*

There is a significant increase in the proportion who now regard FRDC more favourably

- **Stakeholders are concerned about the long term prospects of the Australian fisheries sector. Most acknowledge it is important to make financial contributions to R&D, but also recognise the difficulty in obtaining R&D funding.**
  - Just over eight in ten displayed levels of concern regarding the future outlook of the Australian fisheries sector (81%).
  - Contributions to R&D in the fisheries sector is highly regarded, with 72% agreeing that it is important.
  - However, six in ten indicated that it is difficult to attain R&D funding (60%).

- **Within the fisheries business sector, FRDC is spoken of highly. R&D is also regarded as having a positive impact on respondents' business or organisation.**
  - A third agreed that R&D has a negative impact on their business (33%).
  - 57% mentioned that FRDC generally receives positive word of mouth.
  - Whilst a large majority feel it is vital that FRDC interacts more with stakeholders within the fisheries supply chain (92%).

Q25. Do you agree or disagree with the following statements? Is that a lot or a little?
2006 Base: n=130 (All respondents). 2005 Base: n=201 (All respondents)
**Some statements have been deleted from the original question in 2005.*



Conclusions & Implications

Conclusions and Implications

- **Awareness and knowledge levels are up slightly in 2006, although greater unprompted recall of FRDC is important in enhancing knowledge of core aims and activities.**
  - Industry associations have been highlighted as an important source of business related information and advice.
  - Also worth noting that the findings demonstrated that those actively involved in industry associations nominated stronger performance ratings for FRDC.
  - FRDC’s website is presently under-utilised by stakeholders, and represents an opportunity for further promotion of the organisation through this medium.
  - “R&D News” is regarded as a very good source of industry information and highly recommended by those in the industry. There is potential to use current broad distribution of the publication to generate greater depth of knowledge of FRDC.
  - Opportunity to make R&D News a ‘more interesting read’ and hence increase interest in FRDC activities.

Conclusions and Implications

- **Overall performance rating for FRDC is up somewhat due to a perception that FRDC is increasingly conducting R&D of national significance, in terms of long-term sustainability.**
  - FRDC is seen to be undertaking more relevant and valuable research, providing a good level of funding, and involved in a greater number of projects.
  - Greater recognition of FRDC will essentially strengthen overall satisfaction and allows stakeholders to have a better understanding of the processes and guidelines FRDC has in place (e.g. R&D funds allocation process).
  - Further increases will require an ongoing commitment to stakeholder interaction and engagement.
  - Performance ratings however, vary to an extent across industries and needs to be addressed.
  - A significantly higher proportion of stakeholders agree that FRDC is spoken of highly by businesses and organisations (57%)….*recommended KPI target in 2005 was 60%*.
  - However, some businesses still feel it is difficult to get R&D funding.

Conclusions and Implications

- **Strong evidence that reinforcing the relevance of projects funded by FRDC, ensuring that all research areas are covered, and on-going interaction and engagement with stakeholders will be essential in increasing performance ratings.**
  - Some concern with the distribution of funding for R&D is still evident, with stakeholders wanting more transparency with regards to the funding allocation process (e.g. nature of projects being funded, submissions approval process).
  - FRDC needs to engage with stakeholders more, particularly to advise of application outcomes and reasons submissions were unsuccessful.
  - A small proportion also feel there are important areas of research that are not given due attention….*greater focus on this is required.*
  - Continued or regular interaction is needed to ensure stakeholders are updated on FRDC's activities…*clarity will help to reduce any negative perceptions that exist.*

Conclusions and Implications

- **A higher proportion of stakeholders claim to have funded previous R&D activities themselves, as opposed to approaching FRDC or other organisations. There exists an opportunity for FRDC to engage with these businesses and determine ways they could assist with their R&D needs / requirements.**
  - Allows FRDC to learn more about stakeholders (e.g. their business, aims, goals) and vice versa….*another way to promote awareness and knowledge of FRDC.*
  - Mutual exchange of R&D information and benefits will be made possible.
  - Facilitates the identification of new ideas and encourages partnerships to be formed to further the industry.

Conclusions and Implications

- **Results are encouraging, with FRDC achieving its overall performance rating target, as well as making inroads on achieving other KPIs recommended in 2005. However, spontaneous awareness of FRDC has stayed much the same.**

FRDC Stakeholder Survey KPI Targets for 2007	Current	Target
(Q1.) Proportion able to identify FRDC as the organisation responsible National Fisheries R&D (unprompted)	48%	55%
(Q7.) Proportion of respondents with positive comments in describing high rating of FRDC*	73%	75%
(Q3.) Proportion of respondents aware of FRDC who claim to know a considerable or fair amount about what FRDC actually does*	62%	75%
(Q16.) Overall performance rating of FRDC (with a focus on increasing ‘very’ high)*	65%	65%
(Q25 Statement 8) Proportion agreeing FRDC is spoken of highly by businesses or organisations I talk to*	57%	60%

- **Ipsos also recommends that the sample coverage per State, as well as stakeholder type be closely reviewed on an annual basis to ensure results are representative of the industry spread.**

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

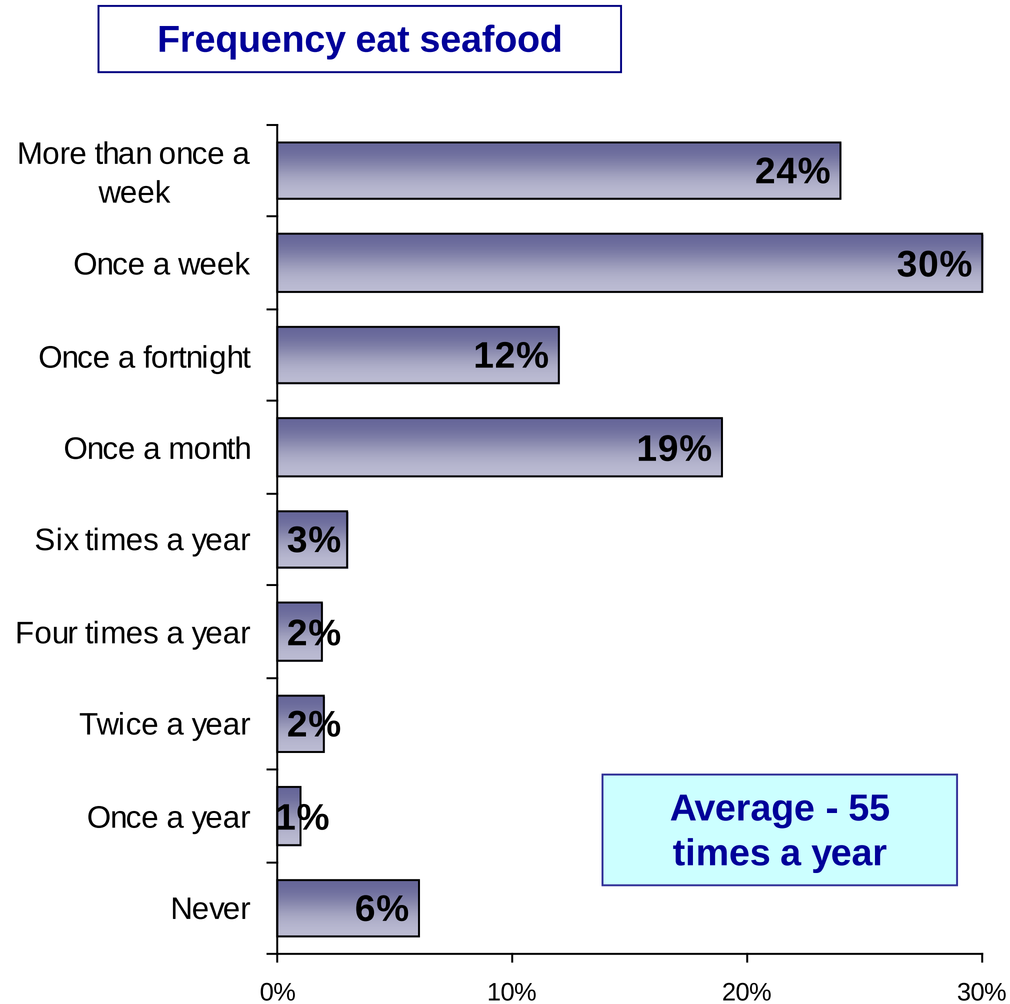
Appendix:

Seafood Consumption Omnibus Results

Background

- **National Omnibus Survey:**
  - Aims:
    - Determine the level of seafood consumption in Australia
    - Understand consumers purchase preferences
    - Identify specific issues influencing their consumption patterns
  - Methodology:
    - Total of 692 telephone interviews were conducted with a nationally representative sample of adult consumers aged 18 years and over
    - All 7 States were represented
    - Main grocery shopper in household was interviewed
    - Omnibus conducted 21 to 22 August 2006.
    - The data is weighted to more accurately reflect the latest ABS population estimates.

Australian consumers eat seafood around 55 times a year on average



- Over half of those surveyed consume seafood at least once a week (54%).
  - 30% eat seafood once a week.
  - 24% consume seafood more than once a week.
  - On average, respondents eat seafood 55 times a year.

Q2a. How often do you usually eat seafood?
Weighted Base: n=11.6 million (All respondents)

Australian consumers eat seafood around 55 times a year on average

By main demographics – there were no significant differences by other demographics

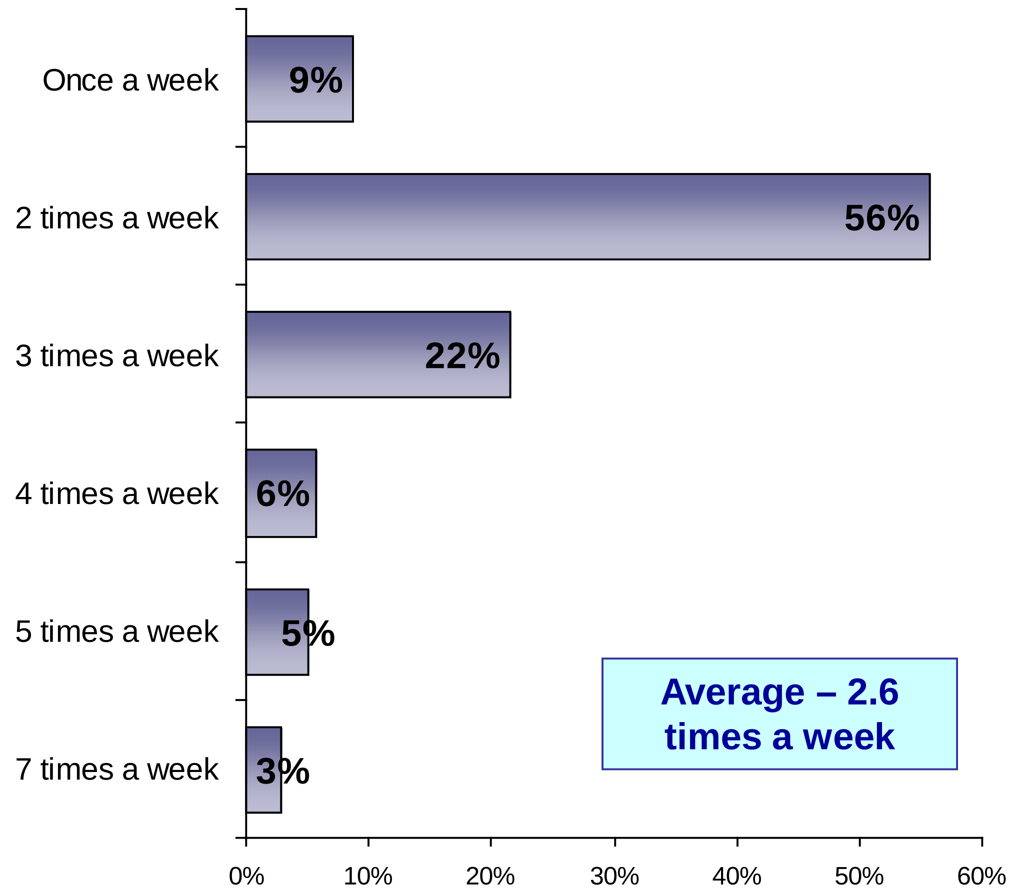
Frequency eat seafood	**Total**	**Male**	**Female**	**NSW**	**VIC**	**QLD**	**SA**	**WA**	**TAS**	**NT**
Weighted base (n=)	*11.6M*	*4.7M*	*7M*	*3.9M*	*2.8M*	*2.3M*	*887,969*	*1.2M*	*296,346*	*82,444*
More than once a week	24%	20%	27%	28%	27%	21%	16%	19%	33%	20%
Once a week	30%	36%	26%	29%	27%	30%	41%	31%	22%	30%
Once a fortnight	12%	12%	12%	12%	12%	11%	16%	15%	5%	7%
Once a month	19%	23%	16%	16%	19%	26%	10%	18%	19%	42%
Six times a year/Every two months	3%	2%	3%	4%	3%	2%	1%	5%	-	-
Four times a year/Every three months	2%	2%	2%	2%	2%	2%	-	1%	12%	-
Three times a year/Every four months	<1%	<1%	1%	<1%		1%	2%	1%	-	-
Twice a year/Every six months	2%	1%	3%	3%	1%	2%	2%	-	-	-
Once a year	1%	1%	1%	1%	2%	<1%	1%	-	-	-
Less often than once a year	<1%	-	<1%	-	<1%	-	-	-	-	-
Never	6%	4%	8%	5%	7%	4%	11%	10%	8%	-
Average times a year	***55***	***52***	***56***	***59***	***56***	***50***	***48***	***48***	***60***	***50***

Q2a. How often do you usually eat seafood?

Weighted Base: n=11.6 million (All respondents)

Weekly seafood consumers claim to eat seafood almost 3 times a week

Number of times per week consume seafood



- Amongst respondents who claim to eat seafood more than once a week, 56% nominated twice weekly consumption.
  - Average consumption of seafood is almost three times a week.

Q2b. And, how many times a week do you usually eat seafood?

Weighted Base: n=2.8 million (Eat seafood more than once a week)

Weekly seafood consumers claim to eat seafood almost 3 times a week

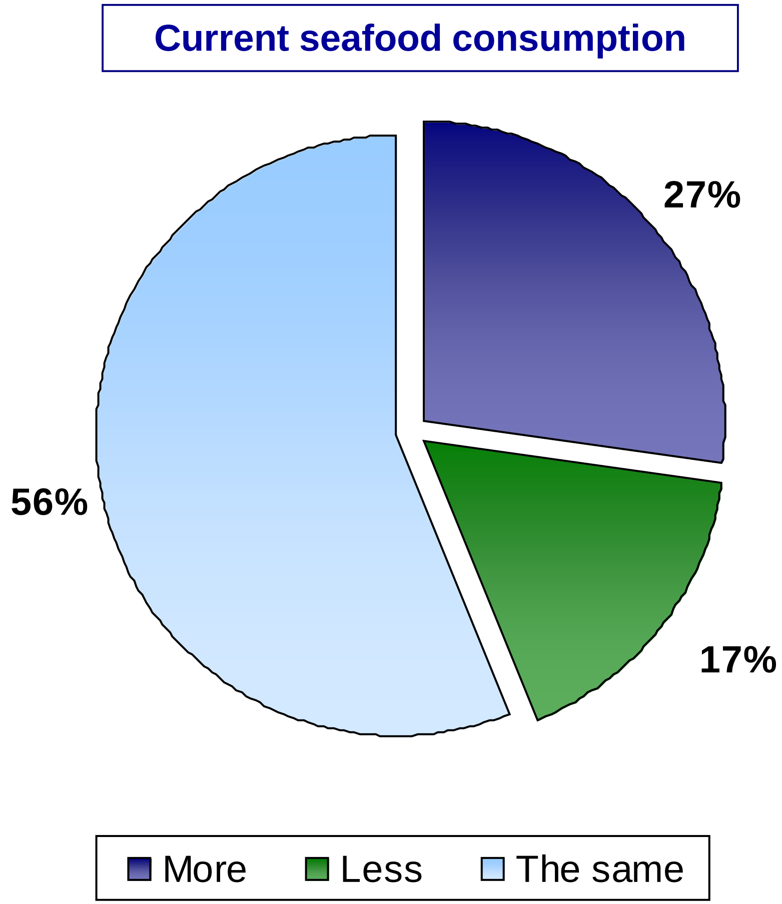
By main demographics – there were no significant differences by other demographics

Number of times consume per week	**Total**	**Male**	**Female**	**NSW**	**VIC**	**QLD**	**SA**	**WA**	**TAS**	**NT**
Weighted base (n=)	*2.8M*	*947,272*	*1.9M*	*1.1M*	*742,492*	*465,585*	*140,285*	*235,429*	*96,970*	*16,892*
Once a week	9%	4%	11%	13%	7%	10%	-	3%	-	
2 times a week	56%	65%	51%	54%	63%	35%	55%	74%	67%	
3 times a week	22%	15%	25%	18%	19%	35%	28%	18%	12%	100%
4 times a week	6%	2%	8%	4%	8%	8%	-	-	21%	
5 times a week	5%	11%	2%	7%	1%	8%	14%	-	-	
7 times a week	3%	1%	4%	3%	3%	5%	3%	-	-	
8 times a week	<1%	1%	-	-	-	-	-	5%	-	
Average times a week	***2.6***	***2.6***	***2.5***	***2.5***	***2.4***	***2.9***	***2.9***	***2.4***	***2.5***	***3.0***

Q2b. And, how many times a week do you usually eat seafood?

Weighted Base: n=2.8 million (Eat seafood more than once a week)

Over a quarter claim to be consuming more seafood currently



- Slightly over one in four consumers claim to be eating more seafood compared to a year ago (27%).
- Whilst a small majority indicated similar consumption patterns to 12 months ago (56%).

Q3. Compared to 12 months ago, are you now eating more or less seafood?
Weighted Base: n=10.9 million (Indicated eat seafood)

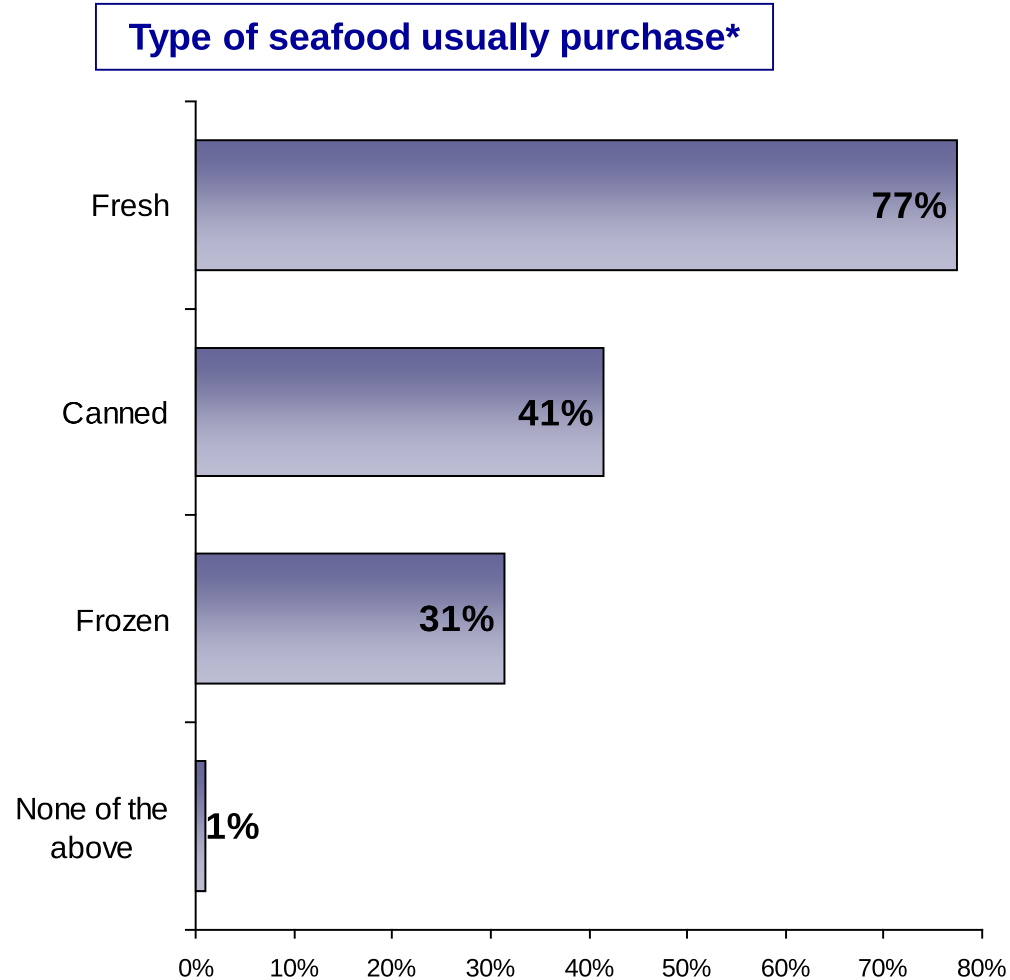
Over a quarter claim to be consuming more seafood currently

By main demographics – there were no significant differences by other demographics

Current seafood consumption	Total	Male	Female	NSW	VIC	QLD	SA	WA	TAS	NT
Weighted base (n=)	*10.9M*	*4.5M*	*6.4M*	*3.7M*	*2.6M*	*2.2M*	*787,141*	*1.1M*	*272,475*	*82,444*
More	27%	20%	33%	32%	23%	25%	29%	24%	20%	63%
Less	17%	19%	15%	16%	15%	19%	22%	16%	4%	30%
The same	56%	62%	52%	52%	62%	55%	49%	60%	76%	7%

Q3. Compared to 12 months ago, are you now eating more or less seafood?
Weighted Base: n=10.9 million (Indicated eat seafood)

The vast majority usually purchase fresh seafood, based on their own definition



- A large proportion of Australian consumers cite preference for fresh seafood (77%).
- To a lesser extent, canned (41%) and frozen (31%) varieties are purchased.

Q4. Do you usually buy fresh, frozen, or canned seafood?
Weighted Base: n=10.9 million (Indicated eat seafood).
**Multiple responses allowed.*

The vast majority usually purchase fresh seafood, based on their own definition

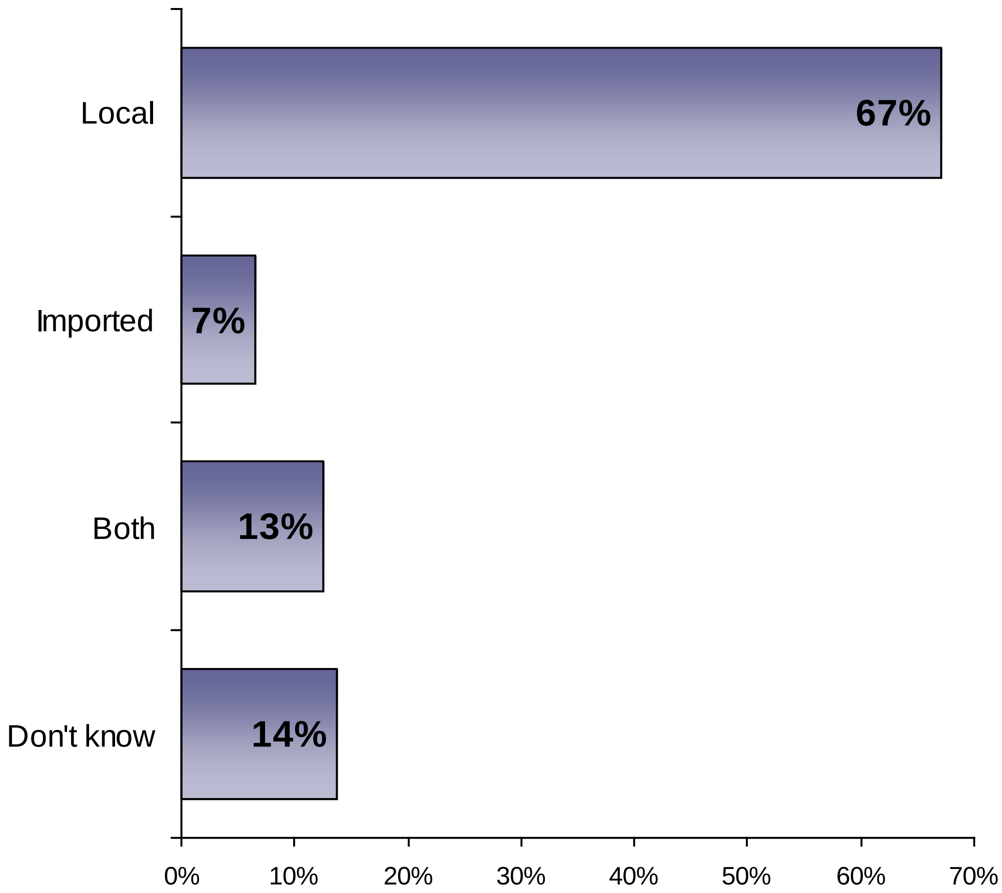
By main demographics – there were no significant differences by other demographics

Seafood type usually purchase	Total	Male	Female	NSW	VIC	QLD	SA	WA	TAS	NT
Weighted base (n=)	*10.9M*	*4.5M*	*6.4M*	*3.7M*	*2.6M*	*2.2M*	*787,141*	*1.1M*	*272,475*	*82,444*
Fresh	77%	81%	75%	79%	81%	78%	62%	75%	69%	73%
Canned	41%	37%	44%	41%	46%	42%	48%	31%	39%	27%
Frozen	31%	34%	30%	25%	28%	28%	51%	45%	40%	27%
None of the above	1%	1%	1%	1%	1%	1%	3%	1%	-	-

Q4. Do you usually buy fresh, frozen, or canned seafood?
Weighted Base: n=10.9 million (Indicated eat seafood).
**Multiple responses allowed.*

Two in three consumers claim to normally buy local seafood over the imported product

Local vs. imported seafood bought



- For 67% of consumers surveyed, Australian seafood is said to be purchased normally. However, this figure may not actually be as high, if some consumers cannot clearly identify local seafood over imported seafood.
- Only 7% of consumers typically buy imported seafood.

Q5. Do you usually buy local or imported seafood?
Weighted Base: n=10.9 million (Indicated eat seafood)

Two in three consumers claim to normally buy local seafood over the imported product

By main demographics – there were no significant differences by other demographics

Local vs. imported	Total	Male	Female	NSW	VIC	QLD	SA	WA	TAS	NT
Weighted base (n=)	*10.9M*	*4.5M*	*6.4M*	*3.7M*	*2.6M*	*2.2M*	*787,141*	*1.1M*	*272,475*	*82,444*
Local	67%	72%	63%	62%	70%	75%	52%	73%	61%	47%
Imported	7%	5%	8%	9%	6%	4%	5%	8%	13%	-
Both	13%	12%	13%	15%	10%	13%	16%	4%	19%	20%
Don't know	14%	11%	16%	14%	14%	8%	27%	15%	7%	33%

Q5. Do you usually buy local or imported seafood?

Weighted Base: n=10.9 million (Indicated eat seafood)

Specific issues or events have negligible impact on seafood consumption

Specific issue or event influenced consumption	
Base (n=)	*10.9 million*
Health benefits	9%
Health concerns (dioxins, mercury)	6%
Media reports / attention	5%
Price / Cost	4%
Safety of imports	1%
Convenience	1%
Availability of seafood	1%
Influence of family / friends	1%
Previous bad experience	1%
Previous good experience	<1%
Other	6%
No specific issue or event	65%

- Almost two-thirds of respondents indicated that consumption levels have not been influenced by any specific occurrences (65%).
- However, one in ten (9%) claim to have been influenced by health benefits.
- Health concerns such as dioxins and mercury content (6%), as well as media reports (5%) were also mentioned.
- Cost was cited as a reason by just 4% of consumers surveyed.

Q6. Has any specific issue or event influenced your seafood consumption in the last 12 months?
Weighted Base: n=10.9 million (Indicated eat seafood)
**Multiple responses allowed.*

Specific issues or events have negligible impact on seafood consumption

By main demographics – there were no significant differences by other demographics

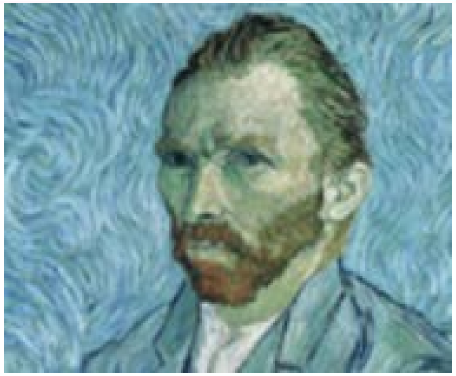
Specific issues or events	Total	Male	Female	NSW	VIC	QLD	SA	WA	TAS	NT
Weighted base (n=)	*10.9M*	*4.5M*	*6.4M*	*3.7M*	*2.6M*	*2.2M*	*787,141*	*1.1M*	*272,475*	*82,444*
Health benefits	9%	6%	11%	8%	11%	6%	6%	13%	11%	42%
Health concerns (dioxins, mercury)	6%	8%	5%	13%	5%	2%	1%	1%	-	-
Media reports/attention	5%	3%	6%	2%	6%	8%	6%	-	16%	-
Price/Cost	4%	4%	5%	6%	3%	2%	8%	8%	-	-
Safety of imports	1%	-	2%	2%	1%	1%	-	2%	4%	-
Convenience	1%	3%	-	-	2%	-	-	5%	-	-
Availability of seafood	1%	1%	<1%	1%	-	<1%	-	1%	-	42%
Influence of family/friends	1%	<1%	1%	1%	-	1%	-	-	-	-
Previous bad experience	1%	1%	<1%	-	1%	-	-	-	-	-
Previous good experience	<1%	<1%	<1%	1%	-	-	-	-	-	-
Other	6%	5%	6%	5%	5%	8%	8%	1%	11%	-
No specific issue or event	65%	69%	63%	61%	65%	72%	71%	70%	58%	15%

Q6. Has any specific issue or event influenced your seafood consumption in the last 12 months?

Weighted Base: n=10.9 million (Indicated eat seafood)

**Multiple responses allowed.*

What is she going to say?



What is he going to hear?

What does she have in mind?

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