


FRDC Stakeholder Research 2008

Final Report of Findings

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Introduction

- The Australian Government's Fisheries Research and Development Corporation (FRDC) has commissioned Ipsos to conduct three waves of comprehensive market research with the Corporation's key stakeholder groups, first in 2005, then in 2006 and again in 2008.
- In 2008, the research program included face-to-face qualitative in-depth interviews with 27 key stakeholders (e.g. state government fisheries managers, representatives from industry associations and research organisations) and a quantitative telephone survey with 160 grass-roots operators in the fisheries and seafood industry in Australia.
- The overarching aim of this research was to assist FRDC with improving its organisational strategy, management and performance by systematic measurement and monitoring of sentiment among 'grassroots' fishing and seafood operators and key stakeholders, and identifying strengths, weaknesses, opportunities and threats.
- This executive summary provides an overview of key findings and recommendations to arise from the research.

Executive Summary cont'd

Summary of Key Stakeholder Perceptions

- Broad awareness of FRDC's role and offer exists, but there is a lack of knowledge about specific objectives, programs and initiatives.
- Key stakeholders would like more strategic involvement with the FRDC and a more formal consultative process when it comes to creating FRDC 'themes' and strategic direction so that FRDC and stakeholder priorities match more closely.
- Key stakeholders expect that relevant outcome-driven projects will be funded, and where appropriate on a national level. FRDC is expected to integrate project knowledge and draw broader and more strategic conclusions and implications.
- There is a perceived lack of performance measurement of government fisheries research spending, return on research investment to FRDC contributors, and success / outcomes of research extension.
- In addition to informal interaction, stakeholders would like more formalised and regular contact, mainly initiated by the FRDC.
- All communication tools are generally well received by stakeholders, especially *FISH* magazine. However, some felt that improvements could be made to the design and user-friendliness of the website, and presentation and distribution of research reports.
  - Stakeholders believe that it is important to continue to engage grassroots operators through *FISH* magazine, as well as using personal contact (whether directly or through others).

Executive Summary cont'd

Summary of Grassroots Stakeholder Perceptions

- Overall recognition of FRDC and knowledge about its activities is quite high among grassroots stakeholders (85%). However, unprompted awareness has declined, suggesting that FRDC is less top of mind for these stakeholders than in 2006 (at 34% vs. 48% respectively).

- Increasing familiarity with the key roles and activities of FRDC would be important in ensuring that grassroots stakeholders recognise FRDC's work and its relevance to them, whilst also making the organisation more top of mind.

- The overall performance rating for FRDC declined in 2008 (51% vs. 65% in 2006), mainly due to perceptions that funding allocation is being misdirected or is lacking, and due to increased perceptions that fisheries R&D does not have a positive impact on grassroots businesses.
  - Notably, more than half of those who were aware of FRDC could not rate its staff (55%), which indicates that many grassroots stakeholders are not in direct contact with staff, or certainly not enough to feel that they can rate them. Those who could rate the staff did, however, provide high ratings, particularly in terms of helpfulness, responsiveness, approachability, knowledge and dedication.

- Grassroots stakeholders continue to be concerned about the long term prospects of the Australian fisheries sector (82%). Most acknowledge it is important to make financial contributions to R&D, but also recognise the difficulty in obtaining R&D funding (66%).

- The majority read the FISH magazine (86%) and most are willing to recommend it (71%), but it could be improved by making it more interesting, providing timely industry updates and a better story mix.

Executive Summary cont'd

Recommendations – Key Stakeholders

Based on feedback from key stakeholders, Ipsos recommends that FRDC considers:

1) Improving knowledge and understanding of FRDC among key stakeholders by means of integrated communications, i.e. utilising a mixture of communication tools such as the website, FISH magazine, meetings and conferences. In particular, the website could be kept more up to date to keep visitors more informed about developments, and encourage greater use and reliance upon this medium.

2) Implementing a formalised consultative process incorporating national strategy consultative meetings, stakeholder provision of strategic plans to FRDC, and interactive stakeholder consultation on draft FRDC plans.

3) Conducting meta-analysis of existing research studies and preparing special reports by topics, which are widely distributed among stakeholders (including via electronic means, not just hardcopy).

4) Developing methodologies to measure and report on government fisheries research spending, return on research investment to FRDC contributors, and success of research extension.

5) Implementing a system of contacting stakeholders regularly via phone, email and face-to-face to discuss matters of relevance and importance to them and gain deeper understanding of their needs and expectations. This should be driven by FRDC, based on the preferences of individual players.

Recommendations – Grassroots Stakeholders

Based on the research with grassroots stakeholders, Ipsos recommends that FRDC considers:

1) Utilising all available information tools to increase not only awareness of the organisation, but also knowledge about its activities and R&D investments. These tools could include FISH and other relevant industry publications, industry associations, conferences, and the FRDC website.
   - Further research could also be conducted to better understand grassroots stakeholder preferences and expectations regarding FISH, the website and other communications, to increase readership and satisfaction.

2) Raising its profile amongst grassroots stakeholders through increased interaction and engagement at all levels, whilst effectively communicating the benefits of its activities. Some consideration should also be given to better meeting grassroots operator needs and expectations in relation to funding allocations across the industry.

3) Building upon its relationships with industry associations, given that industry associations remain the main point of contact for sourcing information and the conduct of research. This should include exploring and developing improved ways in which these organisations can convey FRDC information to the grassroots levels of the industry. As such, FRDC should continue to support industry associations in their activities to provide an essential conduit between grassroots businesses and the FRDC.

Executive Summary cont'd

Key Performance Indicators

- Ratings on all key performance indicators have declined compared with 2006. Spontaneous awareness of FRDC has decreased significantly (Q1), currently at 34%. Also down compared to 2005 and 2006 results is the proportion that claim to know a considerable amount about what FRDC does (Q3) and who rated the performance of the organisation highly (Q16). Although the proportion of those offering positive comments in describing their rating of the FRDC (Q7) has decreased slightly since 2006, it is still higher than in 2005. This is also the case for those who agreed that businesses or organisations speak highly of the FRDC (Q28, Statement 5).

FRDC Stakeholder Survey KPI Targets	2005	2006	2008	Target
(Q1.) Proportion able to identify FRDC as the organisation responsible National Fisheries R&D (unprompted)	47%	48%	34% ↓	55%
(Q7.) Proportion of respondents with positive comments in describing high rating of FRDC*	64%	73%	68%	75%
(Q3.) Proportion of respondents aware of FRDC who claim to know a considerable or fair amount about what FRDC actually does*	60%	62%	44% ↓	75%
(Q16.) Overall performance rating of FRDC (with a focus on increasing 'very' high)*	58%	65%	51% ↓	65%
(Q28, Statement 5) Proportion agreeing FRDC is spoken of highly by businesses or organisations I talk to*	45%	57% ↑	49%	60%

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

↓ ↑ = Significant difference from previous year (at 95% confidence)

Introduction

Background

- The Australian Government's Fisheries Research and Development Corporation (FRDC) has commissioned Ipsos to conduct three waves of comprehensive market research with the Corporation's key stakeholder groups, in 2005, 2006 and again in 2008.

In 2005, the research included:

- A self-completion R&D News readers survey
- Face-to-face qualitative in-depth interviews with key stakeholders
- A quantitative telephone survey with grass-roots operators in the fisheries and seafood industry

In 2006, this included:

- An omnibus consumer survey;
- A repeat of the grass-roots operators quantitative telephone survey

In 2008, this included:

- Face-to-face (and some telephone) qualitative in-depth interviews with key stakeholders
- A quantitative telephone survey with grass-roots operators in the fisheries and seafood industry

Overarching Aim…

- To improve organisational strategy, management and performance by continuing a market research program that enables measurement and monitoring of sentiment among 'grass roots', fishing and seafood operators and key stakeholders, and identifies strengths, weaknesses, opportunities and threats.

Methodology

The 2008 stakeholder research program was conducted in two stages, as outlined below.

Refinement of research goals → 27 In-depth interviews with key industry stakeholders → 160 Telephone interviews with industry operators → Analysis and reporting

In-Depth Stakeholder Interviews

- Combination of predominantly in-depth face-to-face interviews, and some telephone interviews
  - 27 FRDC nominated key stakeholders interviewed, including State Government Fishery Managers (7), Industry Group Representatives (13), Research Organisations (5) and Recreational Fishing Organisations (2).
  - Interviews conducted by Ipsos consultants: Jasmine Hoye, Preslav Bondjakov and Jenn Fowler
  - Duration of interviews: 1.5 - 2 hrs
  - Timing: 22 October to 26 November 2008

Telephone Interviews

- Conducted a total of 160 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: 20 minutes
  - Survey conducted 1 December to 17 December 2008
  - Respondents sourced from FRDC, Australian Seafood Industry Directory, industry associations and other industry contacts

Qualitative Research Findings

Understanding of FRDC's Role and Offer

FRDC's key stakeholders appear to have a general understanding of the organisation's role and breadth of services, but some stakeholders demonstrate knowledge gaps about specific objectives, programs and initiatives.

- Stakeholders are essentially aware of specific programs that directly relate to their sector or business, but lack broader knowledge of FRDC activities, though FRDC action taken on climate change and people development, as well as industry/market development, sustainability and animal health, were often spontaneously mentioned.

- While knowledge of FRDC is high among key stakeholders operating at a board or executive level, the perception is that awareness and knowledge of FRDC is dramatically lower among grassroots operators. Key stakeholders tend to believe that it would be advantageous for grassroots fishers to be more aware of the FRDC so that they have an outlet through which to contribute. This could also foster interest in generating innovative ideas from *'the coal face'*, and provide recruitment opportunities for the People Development program. There was a sense among a few stakeholders that more engagement could be achieved through one or more 'roving' FRDC consultants or representatives to promote awareness and understanding among fishers about FRDC and the opportunities that it offers to individuals in the industry.
  - Of interest, the Empowering Industry project was not mentioned by name.

- When it comes to administering projects, there is a perception among some Research and Government stakeholders that FRDC sometimes struggles to maintain a national perspective, and that this can lead to cross-state duplication and mis-investment of R&D funds.

"What's happened in the past is a fair bit of duplication in terms of states doing their own things." (Industry)

Understanding of FRDC's Role and Offer cont'd

In lieu of a national fisheries peak body, some stakeholders believe that the FRDC is trying to fulfil this role, and there are mixed feelings on this.

- Among quite a few stakeholders, FRDC is seen to sometimes deviate from its core role of funding and administering research and development projects within the fisheries industry (particularly among Government stakeholders, as well as a number of Industry and Research stakeholders). It is also seen as the "go to" organisation for advice on issues outside of R&D, with industry experts who can be trusted. A better definition and clarification of FRDC's role is called for.

- Stakeholders perceive the role of FRDC as starting with the identification of a need and finishing when research results have been properly disseminated to industry and interested parties (i.e. appropriate outcomes achieved through transferring research into commercial applications).

  "If I do a body of research and I publish it in a scientific journal, it's not finished. I believe there should be uptake of research, delivery of outcomes for industry. It is not sufficient to just identify the means for detecting the impacts of salmon farming on the environment. We have to go beyond that and work out how that understanding can be turned into practical management and application, and see how it can deliver outcomes for all sides in day to day operations, translating research outputs to research outcomes." (Research stakeholder)

- There is also a strong belief that the FRDC is too involved in higher level politics in relation to industry and fisheries management, and this perception is especially prevalent among the State Managers. The FRDC is already perceived as a 'lean' and 'efficient' organisation, whereby involvement outside of the mandate could be seen to affect strategic direction and operational efficiency.

Understanding of FRDC's Role and Offer cont'd

- There is a perception that the FRDC, at times, tries to please everyone to gain popularity among stakeholders. In their efforts to do so, the FRDC is seen to under-deliver. Stakeholders would prefer that FRDC is honest and realistic about what they can and can't do, and not over-promise.

  "FRDC needs to say 'no'. It tries to please everyone, so promises a lot but delivers a little." (Industry stakeholder)

- Many of those interviewed noted that there had recently been a definite shift in focus from research projects to a larger focus on development and (outcome based) extension activities, and this has been quite well received. The Corporation is, however, generally still seen to be a "big R little d" in terms of relative focus on research as distinct from development. More focus by FRDC on industry and market development over time is welcomed – especially from industries that are more mature and have already undertaken extensive scientific research. Around a third of stakeholders interviewed mentioned this, particularly those from Industry.

  "More work needs to be done on development and extension and less on [scientific / species related] research, and it's reflecting the economic pressures that the industry is under…largely arising from the cost-price squeeze." (Industry stakeholder)

  "They have a development program, but we don't see many development applications coming through. We've put many up over the years, that haven't been supported. There is not a big focus on development programs, don't know why - suppose they're looking for risk and return." (Government stakeholder)

Needs and Expectations of FRDC

Stakeholders want more strategic involvement with the FRDC and a more formal consultative process when it comes to creating FRDC 'themes' and strategic direction.

- Many of those interviewed believe that FRDC priorities are not being adequately informed by stakeholders, and therefore there is the perception that – as one participant said – *'the tail is wagging the dog'*. Industry and key stakeholders seek greater input into the strategic direction of FRDC, so more of a bottom up approach is required. The expectation is that FRDC priorities be closely aligned with stakeholder priorities and to achieve this, it was suggested that key stakeholders inform the FRDC of their strategic priorities for consideration before 'themes' are decided and disseminated.

"Take strategic plans as developed by industry and move upward – superimpose what Government wants – bottom up." (Industry stakeholder)

- Quite a few (10) stakeholders suggested that, as an initial step, they be consulted through annual national meetings at the senior management level, discussing issues affecting the industry in particular states and nationally. This would be a mechanism for FRDC jurisdictions to formally consult on key issues of national significance as well as across jurisdictions. Rather than discussing 'small scale' issues - big ticket or big picture items would be on the agenda such as long term sustainability and profitability, economic development, examining critical mass, etc. Outcomes would then be seen as feeding into the FRDC strategic priority setting process, with the aim of achieving a close match between stakeholder R&D needs and FRDC objectives.
  - There is an expectation that these meetings would be organised and managed by the FRDC and recognise that considerable amount of time and resources would be invested; however the return on this investment would be high.
  - A few stakeholders did mention FRDC's current 5 year R&D plan and the board consultation with stakeholders .

Needs and Expectations of FRDC cont'd

  - While the current FRAB function / group addresses issues or R&D opportunities at the state level, this process does not cover national issues, therefore a gap exists when addressing broader and common issues across states and territories. A national FRAB meeting may prevent duplication or overlap of R&D projects, or at least provide a broad view of industry concerns.

- Stakeholders suggested sending their strategic plans to FRDC to inform the FRDC strategic priorities before they are set.

"I think industry should drive the FRDC rather than the other way around." (Industry stakeholder)

- A couple of different stakeholders suggested that after the FRDC's strategic plan has been drafted, ideally considering all stakeholder input and Government expectations, it then needs to be circulated among key stakeholders for feedback which would then be incorporated into the final plan.
  - A few stakeholders specifically mentioned the fact that FRDC has a 5 year strategic plan in place.

- While stakeholders expressed a strong desire to be listened to or consulted on the strategic direction of the FRDC, they also realise that the FRDC is operating under a number of constraints, including other stakeholders, the government and political influences.

"They are at the whim of the political system and if history is the judge then no matter how good they are, they are at the risk of being turned into something else." (Research stakeholder)

- In terms of priority setting, most stakeholders generally felt that the FRDC does have the same overarching goals as their own organisation (i.e. to ensure a sustainable industry for the future), and that although specific objectives were not necessarily completely aligned, there is a sense that this is gradually being worked towards.

Needs and Expectations of FRDC cont'd

Stakeholders want relevant projects funded that are outcome driven, and where possible to have a national focus. FRDC is expected to integrate relevant project knowledge and draw broader conclusions.

- When it comes to projects being approved, some hold the perception that commercial fisheries, aquaculture, and the largest contributors to the FRDC have 'the loudest voice'. A more objective and outcome driven approach is thought to be needed in deciding what projects are funded.

"There is certainly a perception that they favour the big end of town … the very wealthy people, the publicly listed people." (Government stakeholder)

- Through the FRAB process and the application process in general, there needs to be more feedback on why applications are rejected. Many stakeholders interviewed described being dismayed at certain projects being knocked back, and uncertain as to why. This has caused frustration and prompted some to distance themselves entirely from the process to become more independent.

"In our FRAB each year we list the top ten projects, and they fund number 3 and number 9. We think, 'Why did we put so much energy into having all these meetings and being so rigorous?' It becomes a waste of friggin' time. If we're going to continue to invest, we want project numbers 1, 2, and 3 to be funded, so long as they align with state research priorities, which are documented, and the R&D plan, and we don't get that and it's very frustrating." (Government stakeholder)

- Some concern over the application process relates to projects being funded because the application may be well written, rather than the intended outcomes being relevant. There is the perception that some people in the FRAB do not understand how an output can translate into an outcome. A suggestion was to begin each application with the outcome very clearly in mind from the outset.

"Even if [an application] *is written very well, in the end if it's not going to change anything then don't bother."* (Research stakeholder)

Needs and Expectations of FRDC cont'd

- Furthermore, it was suggested that all applications have a steering committee linked to them to ensure that high quality, well thought out applications are submitted.
- Some stakeholders view the application process as onerous. Two key problems were identified: the actual mechanics of lodging an application and the process of application approval.
  - The web-based lodgement process is perceived by some as being not user friendly, complicated, hard to navigate and has time out issues.
  - The application approval process is viewed as too long. A few stakeholders mentioned that this can currently take up to 18 months (much longer than it actually takes – 9 months, as stated by FRDC). There is a danger of research losing its relevance due to this, and in some instances, biological consequences with such a delayed process.
  - The Tactical Research Fund is seen as a positive initiative for smaller projects, while larger scale projects that require fairly urgent funding would miss out. Some opted to apply for funding through other organisations such as the Australian Seafood Co-operative Research Centre (ASCRC), CSIRO and universities, rather than the FRDC due to current timeframes and the perception that they can get funds faster elsewhere.

"The good thing about ASCRC is, they're willing to take on the risky projects. You're not competing for a pool of money, you just have to come up with the good ideas." (Industry stakeholder)

- The FRDC is seen by some as quite project-by-project oriented – while the sense is that it needs to be more strategically oriented and look at the big picture and not lose sight of important sustainability issues. Towards this, some stakeholders intimated that the FRDC needs to integrate the project-based knowledge with the existing body of knowledge and broader context, to enable more useful and widely relevant conclusions to be drawn and outcomes to be achieved.

Needs and Expectations of FRDC cont’d

There is a perceived lack of performance measurement (and/or feedback) of a number of factors including Government fisheries research spending, return on research investment to FRDC contributors, and success of research extension.

- There is a perceived lack of performance evaluation of the Commonwealth Government’s fisheries research spending.

  “When you add up the total quantum of money that’s spent in research over a 5 year period, where has it actually taken the agencies who are managing the fisheries? I know there’s always this flow of benefit thing on every research project that’s done, but how much of that is real and how much of it isn’t, I mean where has the real contribution been?” (Government stakeholder)

- Stakeholders are concerned that there is no clear methodology on how to measure the value or return on research investment to individual contributors. In turn, this leads to confusion for some stakeholders about whether levy payers are actually getting value for money.

- There is a perceived need for Key Performance Indicator monitoring on the success of research outcome adoption and extension – this would provide information about how relevant the research undertaken is to industry and whether adoption takes place as intended. In addition, it would be important to communicate benefits and outcomes of projects to enhance general industry knowledge and appreciation.

Relationship with FRDC

The majority of stakeholders interviewed hold the FRDC in high regard, and enjoy good working relationships with its staff. However, they would like more formalised and regular contact.

- Respect is high; the feeling is that although the FRDC and stakeholders don't always agree, FRDC's people are still regarded as the experts in the industry. In fact, FRDC's personnel are highly respected for the way in which they respond to arguments and explain their position.

- Some stakeholders perceive that the FRDC does not always listen. Stakeholders would like to be engaged in an effective dialogue and this is where the FRDC could benefit from a 'roving' consultant for each state.

"There is a perceived lack of understanding and empathy. Seems like they are always right – doesn't matter what business case you put up. They don't listen. You do get the impression that they don't listen because they are too busy talking." (Industry stakeholder)

"Come and visit me. That's the best way for them to show an interest in what I am doing – like a sales rep. I'm not going to Canberra to bang on doors or curry favour to get money to get on with the job." (Research stakeholder)

- The FRDC is seen to have a strong physical presence, being very visible around the country at workshops and conferences, and very hard working. Indeed, most participants could cite the full name of many of the staff at FRDC, with whom they are in regular contact. There is however, a perceived lack of formal and/or formalised meetings. Many stakeholders are satisfied with the level of visibility, but seek less ad-hoc interaction and a more organised approach to meetings to discuss more broad issues en masse, and more specific issues one-on-one.

Relationship with FRDC cont'd

- Although the FRDC is perceived as very accessible, communications are often thought to be initiated by the stakeholder, and can be perceived as somewhat one sided leaving the impression that there is a need for more contact initiated by the FRDC. Nonetheless, a number of the stakeholders acknowledged that Dr Hone in particular must be in contact and dealing with so many individuals that more active communication from him with individual stakeholders and organisations would be extremely difficult.

- Some stakeholders felt that the FRDC has the tendency to take control of projects and needs to have more of a co-management approach rather than an authoritative one.

"They have to recognise their partnerships in delivery rather than trying to take ownership of stuff." (Government stakeholder)

"They try to direct rather than the other way around. The direction should be heeded a lot more – it's my money." (Industry stakeholder)

- The FRDC is viewed by most as an efficient, well organised corporation with mostly good operational processes in place. There is a feeling that it could do with some more senior people on board – keeping the corporation 'lean', but not so lean that its resources are spread too thinly.

- A couple of stakeholders, however, perceive the FRDC as 'aloof' and arrogant at times, following due process with lots of red tape to get through before one can get anywhere.

"Aloof and removed – arrogant dominating air of intellectual superiority to lord over the lesser mortals." (Industry stakeholder)

Relationship with FRDC cont'd

Positively, the Executive Director, Dr Patrick Hone is highly regarded among key stakeholders.

- Stakeholders are very positive when describing the Executive Director, Dr Patrick Hone, using words such as intelligent, knowledgeable, trustworthy, responsive and suitably accessible, a great communicator and a real industry person. For many of those interviewed, Dr Hone is their main point of contact with the organisation, some even commenting that Dr Hone is FRDC.

"Patrick has industry knowledge and passion for his job and understanding of science. His commitment to the fishing industry, his knowledge of industry; he runs a very tidy organisation, very strong on probity and contracting." (Government stakeholder)

- The only negative comments pertained to an occasional air of arrogance, selective hearing and trying to accomplish things outside FRDC's mandate. Quite a few comments were also made to the effect that Dr Hone runs the risk of spreading himself too thinly or is trying to be everything to everyone.

- There is also a belief among some stakeholders that a successor of similar character needs to be brought on board and groomed, working very closely with the Executive Director, just as Dr Hone was groomed for the role by his predecessor.

- Currently, impressions of the FRDC appear to be personality focussed rather than organisationally focussed. Although there was mostly positive feedback for the Executive Director, this perceived personality focus could pose a future threat. For example, perceptions of the corporation may change significantly if he (or a similar personality) were no longer in this position.

"FRDC is the best operation I have ever dealt with in my entire life. Their people are very skilled at relationships and government process. They're the only one across the board who have been very good at both relationships and process…The only thing that ever worries us, is that there is only one way they can go if things change, and that is down." (Industry stakeholder)

FRDC Communications

A variety of communication tools and channels are utilised by stakeholders, with many stating that they enjoyed a suitable level of face-to-face contact, as and when required, while most are happy with telephone and email contact for regular day-to-day communications.

- The key stakeholders interviewed are generally happy to reserve face-to-face communication for special occasions and when negotiating on matters of gravity. A number of participants stated that if they need to, they will fly to Canberra, and will in turn receive a suitable level of attention; however the preference is for FRDC staff to visit key stakeholders from time to time so that they better understand stakeholder issues and build stronger relationships.

"Better to have a shared journey…If you're interested in getting it right, then you need to talk to the people". (Industry stakeholder)

- However, most stated that they were comfortable to send an email or pick up the phone when they need to contact FRDC, indicating a preference for less formal modes of communication on a day-to-day basis. Comments were made to the effect that these individuals are really very busy, so email and phone suits them as a quick and easy way of communicating.

- When looking at the particular FRDC communications, stakeholders had this to say:

  - ***FISH*** – Seen as a clear and easy to read publication; important that this is in *'fisher speak, not science speak'*. *People on the Move* was mentioned by some stakeholders as a valuable inclusion.

"The initiative and contacts of the PR manager, Peter Horvat… I find him very good in the Canberra context. He adds value; if you want a message delivered in Canberra, or want to know who to contact, he's very good for that. Their magazine is by far the best vehicle of government communication. It's the one surviving while all the others have fallen by the wayside, it's survived (FISH).*"* (Industry stakeholder)

FRDC Communications cont'd

- **Website** – Generally perceived as not very user friendly, old fashioned and difficult to navigate. Stakeholders who had used the website had recently used it for finding relevant contacts at the FRDC, research reports and lodging applications. When it comes to more complicated information searches and the application process, efficiency is lacking. Indexing and organisation of information and reports appears to be less than adequate. Various search options need to be implemented to improve searchability of the site i.e. by theme, state, key words, sector etc. Also a sense that the news on the home page needs to be updated more often, so that the site is seen to be less static and having more of a 'finger on the pulse'.

- **Research Reports** – These tend to be fairly well received, but there is concern that they are overly technical and scientifically written, and only available at a charge.
    - Stakeholders would like reports to have less 'science speak' and more 'laymen's' terms, for ease of understanding.
    - Executive summaries are expected to be succinct, non-technical, outcome-oriented and aimed at the management level.
    - It was suggested that a PDF version be available free of charge on the web and that a one page summary of the research, similar to an Executive Summary, also be available. Some stakeholders commented that they no longer receive hardcopies of other publications, for sustainability reasons, and questioned why they should not have the same option provided by the FRDC.
    - Some concern was expressed over the delay between the completion of the project and the release of a report after it goes through the peer review process. In some instances, the delay means that the research findings are no longer relevant.

FRDC Communications cont'd

- **People Development** – Stakeholders are generally aware of this new program and perceive it as valuable, but many are yet to utilise it and fully grasp its potential. The FRDC is seen to be relying on the sector leaders to get the message out to the grassroots operators, but given that the message is only as effective (and as consistent) as the messenger, this is an instance where a roving FRDC consultant could be valuable in ramping up promotion of the People Development opportunities available.
  - A few stakeholders – mainly from Industry – commented on the time-poor nature of fishers, and this being a constraint upon their ability to participate in or take advantage of the program.

Future Focus of FRDC

The future of FRDC looks fairly bright and stakeholders definitely recognise its value, but some threats are apparent. There is a definite perceived need for FRDC's existence in the future.

- Stakeholders hold a firm belief in the need for FRDC and Australian fisheries industries to survive and thrive. Generally stakeholders have a positive outlook for the future of FRDC. However, there are a number of potential threats, as follows:

  - **The Cutler Review** – which recommends a merging of R&D corporations nationwide and therefore a watering down of pure industry focus. With no guarantee of research and development money going towards FRDC, another potential consequence of a merge is that the levies paid to FRDC may be lost to other organisations. Many Industry stakeholders made mention of this.

  - **Relevance** – ensuring that the FRDC remains focused on industry needs and aligns strategic planning with those needs to ensure funding is appropriately allocated. This was mentioned by many stakeholders across all sectors, but mostly by those in Industry and Government.

  - **Government funding** – if the dollar matching is not at least continued in its current format, levy payers may fail to see the value for money and thus the same level of financial contributions to the FRDC may be at risk.
    - Many stakeholders - mostly Industry and Government - expect that there will be less funding now with the new Government, meaning less for research when there is a need to do more. This could be a good opportunity for FRDC to step up commercialisation-related activities.

"One possible outcome [of the Cutler Report] *is that maybe FRDC would combine with another RDC and we are very strongly opposed to that. Research coordinators work best at a micro level. Once you start combining them, a lot of the culture is lost, and efficiency. It's the same as trying to have an overall IT policy across the whole of government. Attempts made to save money through efficiency gains have always failed. What drives it is people being committed to that particular industry, and as soon as you get 'outsiders' you get a loss of commitment, and there's plenty of examples of that through history."* (Industry stakeholder)

Future Focus of FRDC cont'd

- Stakeholders feel that the FRDC needs to continue investing in human management including training and education in order to bring in fresh people in management positions and maintain high professional standard, but these opportunities must be highly visible and accessible to all levels of resources within the industry.

- Feedback from key stakeholders indicates that the FRDC needs to become more strategic and develop a tighter strategy that is aligned with industry, and ensure that this is widely and effectively communicated to stakeholders. Some stakeholders perceive the FRDC to have an ad-hoc approach at times or a tendency to work from project to project rather than looking at the whole picture.

"They often seem to be reactive rather than proactive as they spend too much time trying to fix things from the back end rather than ensuring it is okay from the beginning." (Government stakeholder)

Most stakeholders agree that a focused list of priorities would mean more effective outcomes.

- Many stakeholders feel that the FRDC needs to prioritise its list of priorities and perhaps shorten the list with a view to being more focused. A manageable amount of objectives should be selected for good coverage rather than trying to take on too much and under delivering.

- Considering other feedback, the FRDC needs to consider carefully whether each objective falls within its role, or where FRDC's responsibility begins and ends within achieving these goals.

"The FRDC should focus on their core business, and should not get distracted by areas that fall into the mandate of other Commonwealth jurisdictions." (Government stakeholder)

Future Focus of FRDC cont'd

- Some stakeholders believe that the FRDC is already effectively carrying out some of the future priorities presented to them and therefore have placed importance on areas that need more attention. Areas that appear to be already well covered are:
  - Industry adoption of co-management fisheries principles;
  - Improved sustainability performance; and
  - Research, development and extension activities to assess and respond to climate change.
    - FRDC is seen as the leader in this area, but there is also the feeling that this is a bigger problem and therefore a whole of government responsibility.

- Some priorities were viewed as shared responsibilities that required government assistance. These included:
  - Research to assist Australian seafood companies in accessing new markets
    - Also the responsibility of Austrade, Department of Foreign Affairs and Department of Agriculture, Fisheries and Forestry and Commonwealth Fisheries Association (CFA).
  - Research to facilitate cost effective biosecurity measures for industry
    - Also sees as the responsibility of Australian Quarantine Inspection Services (AQIS) and Biodiversity Australia.

"I wouldn't want to achieve all of them, I think this needs to be a smaller, shorter list, and some of them will always be ongoing; sustainability performance is always going to be ongoing. You'd need to think about where the key ones are that you want to deliver in the next five years, and then go chasing them; I wouldn't chase the bigger list."
(Government stakeholder)

"It should continue to back the views of the industry and rank the industry's input as its highest priority looking forward."
(Industry stakeholder)

Future Focus of FRDC cont'd

Importance of FRDC future priorities as rated by stakeholders…

FRDC Future Priorities List	Mentions*
Research, development and extension activities to assess and respond to climate change	14
Increased extension material for industry and community built into research applications	13
Industry adoption of co-management fisheries principles	12
Applications for capacity building and work force challenges (participation, advancement and retention)	10
Revolution over evolution – applications for projects that will drive innovation and move the industry forward at a greater pace	10
Improved sustainability performance	9
Research to assist Australian seafood company's access new markets	9
Increase in finfish production through improved hatchery technology and feeds	9
Research based processes for spatial management	9
Research to facilitate cost effective biosecurity measures for industry.	8
Developing models or systems for the collection of recreational fishing data	8
Development of tools for undertaking social and economic assessments	7
Increase in entities utilising improved stock from selective breeding programs	7

*Number of positive mentions. These results are indicative only due to small number of responses. Not all stakeholders were able to respond to this question due to some interviews being conducted over the telephone or time constraints.

Quantitative Research Findings

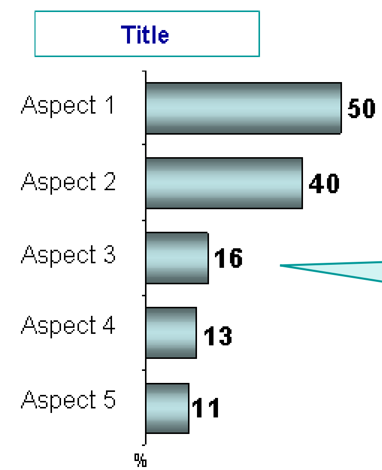
How to Read this Report

Heading or *Insight Statement*

Heading or insight, key take-out / implication from results

Findings in written form

- Finding 1
- Finding 2
  - Sub-point
    - Sub-group differences



Graphs and tables showing results

Grid Title	Total (n=160)	Aspect A (n=35)	Aspect B (n=37)	Aspect C (n=84)	Aspect D (n=41)
Aspect 1	60%	63%	44%↓	78%↑	55%
Aspect 2	40%	37%	[illegible]	22%	45%

↓↑ = Significant difference (at 95% confidence)

Base: All respondents (n=160)
QX. What is your opinion of…?

1

Sample base (n=value), filter/ skip parameters and actual survey question

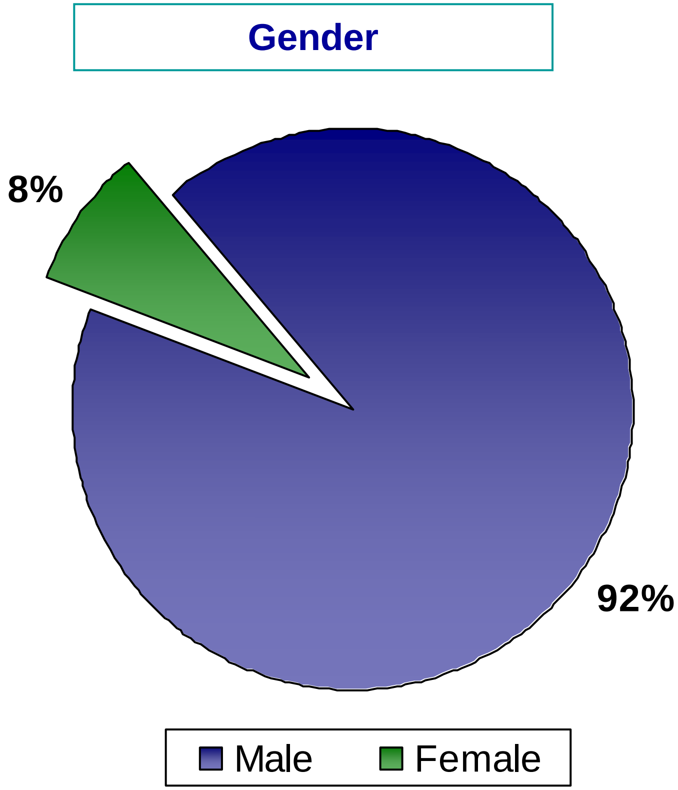
Page number

Statistical significance indicators:
Arrows **are used to identify significant differences compared with the previous wave/s – up means higher and down means lower at the 95% confidence level.**

IMPORTANT READER NOTE:

Survey results presented are indicative of the perceptions and opinions of the broader fisheries sector…sample sizes are generally too small to accurately report on the extent of differences across stakeholder types. The results are based on all respondents, however there may be questions where indicative data is presented based on subsets of respondents.

Respondent Profile – Gender and Location



Respondent Location			
State	**2005** (n=201)	**2006** (n=130)	**2008** (n=160)
WA	10%	12%	24%
SA	41%	29%	18%
QLD	15%	8%	17%
NSW	25%	23%	14%
TAS	15%	20%	13%
VIC	6%	6%	8%
NT	2%	2%	6%

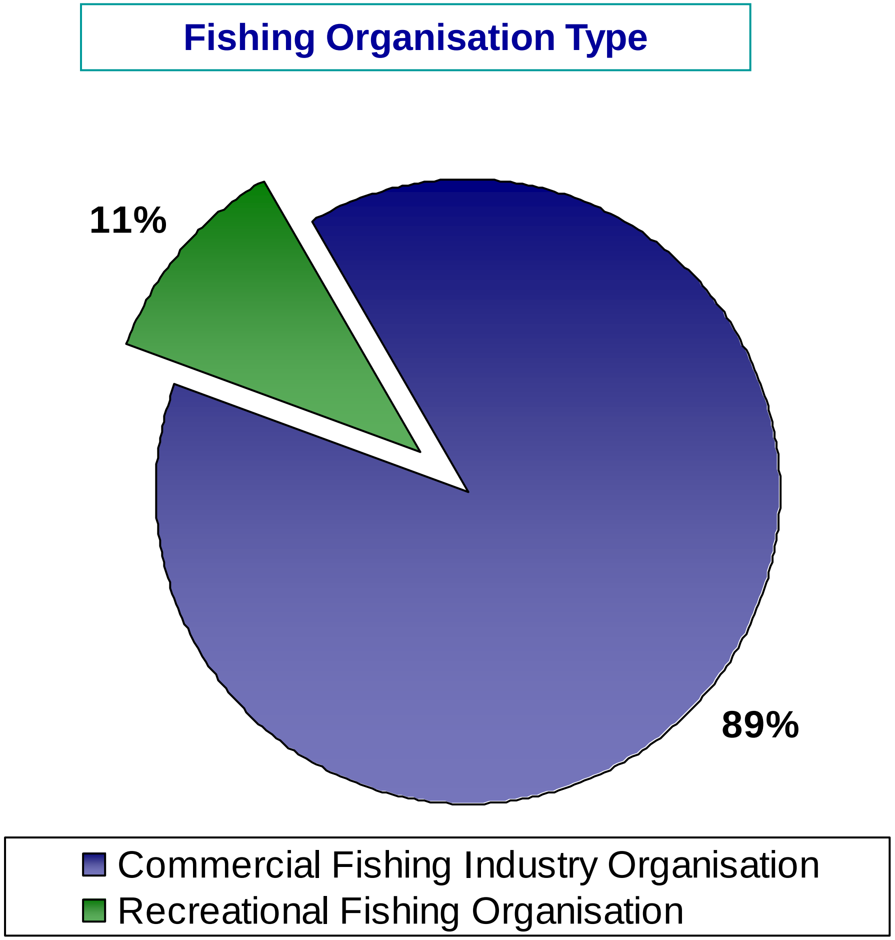
- The survey sample comprised just 8% females and 92% males.

- Extra care was taken in 2008 to ensure that sampling was reflective of the number of operators in each state/territory.

32. Record gender
2008 Base: n=160 (All respondents).

S1. In what state or territory do you undertake fishing?
2008 Base: n=160 (All respondents).
2006 Base: n=130 (All respondents).
2005 Base: n=201 (All respondents).

Respondent Profile – Fishing Organisation Type



- In 2008, and in line with past surveys, the majority of those interviewed were part of a Commercial Fishing Organisation (89%), while 11% were part of a Recreational Fishing Organisation.
- Similarly, in 2006, 85% of those surveyed were involved in a Commercial Fishing Organisation, and 89% in 2005.
- Recreational fishers made up 10% of the sample in 2006 and 8% in 2005.
- In 2008, Commercial respondents belonged to the following industry types:
  - Wild caught fish or seafood – 63%
  - Aquaculture – 42%
  - Post harvest – 4%

S2. Are you a commercial or recreational fishing organisation?

2008 Base: n=160 (All respondents)

Respondent Profile – Membership of Commercial Fishing Sectors

Commercial Fishing Sector	Membership (n=142)
Pacific Oysters (PO)	13%
Western Rocklobster (WRL)	10%
Barramundi (B)	9%
Southern Rocklobster (SRL)	7%
Inshore bay/beach/shelf	5%
Crab	4%
Mackerel / Spanish Mackerel	4%
Ornamentals / aquarium fish	4%
Estuary General Fishery	4%
Shark	4%
Demersal Gillnet & Demersal Longline	4%
Atlantic Salmon (AS)	3%
Scale fish	3%
Australian Abalone Growers Association (AAGA)	3%
East Coast Prawn Fisheries (ECFP)	3%

- The adjacent table shows the breakdown of sectors respondents belonged to. Please note that this was a multiple response question therefore respondents could belong to more than one sector.
  - *Pacific Oysters* had the largest membership at 13%, followed by *Western Rocklobster* at 10%, *Barramundi* and *Southern Rocklobster* (9% and 7% respectively).

S4. What fisheries sector do you belong to?

2008 Base: n=142 (Commercial Fishing Organisation)

Note: Multiple response, percentages do not add to 100%. Main mentions only 3%+. For the remainder of fisheries sectors mentioned see Appendix 3 .

Respondent Profile – Recreational Fishers

Recreational Fishers – Type Caught	Responses (n=18)*
Inshore bay/beach/shelf	5
Flathead	5
Snapper	4
Barramundi (B)	3
Trout	3
Tuna	3
Bream	2
Southern Bluefin Tuna (SBT)	1
Australian Bass / Bass	1
Marlin	1
Offshore	2
Other	7

- As in past years, Recreational fishing respondents included peak body and industry representatives only.
- The total number of Recreational fishers was n=18 which is 11% of the total sample:
  - Five Recreational fishers (n=5) took part in *beach/shelf/inshore bay* fishing
  - *Flathead* was the most popular fish type caught (n=5), followed by *Snapper* (n=4)
- *Other* includes:
  - *"Anything I can catch", "All native fish in NSW", "Fresh water", "White Head" and "Fish species".*
- Please note that this is a small sample size and when comparisons are drawn between Commercial and Recreational fishers throughout the report, they are indicative and not statistically comparable. Also note that this is a multiple response question therefore percentages do not add up to 100%.

S4. What type of fish or seafood do you fish for?

2008 Base: n=18 (Recreational Fisher) . Multiple response, percentages do not add to 100%.

Respondent Profile – Industry Involvement

- Respondents were asked a series of questions about their involvement in the industry, for profiling purposes. Results for these self reported attributes are consistent with the past waves of research, in that respondents expressed a high level of commitment to remaining in the industry, most see themselves as early adopters and most claim to be highly active in the industry.

Respondent Profile	2005	2006	2008
I plan to still be operating my business in 5 years time*	90%	85%	89%
Compared to others I am typically one of the first to adopt new ideas and practices in my business*	76%	85%	82%
I own this business* #	Not asked	79%	77%
I value highly industry journals or magazines	82%	74%	76%
I am actively involved in my industry association	79%	78%	72%
I regularly attend fisheries events	77%	76%	71%
I rely on the internet for sourcing important information for my business	51%	66%	58%

Q29. Answering yes or no, which of the following describes you?

2008 Base: n=160 (All respondents). * 2008 Base: n=142 (Commercial fishers)

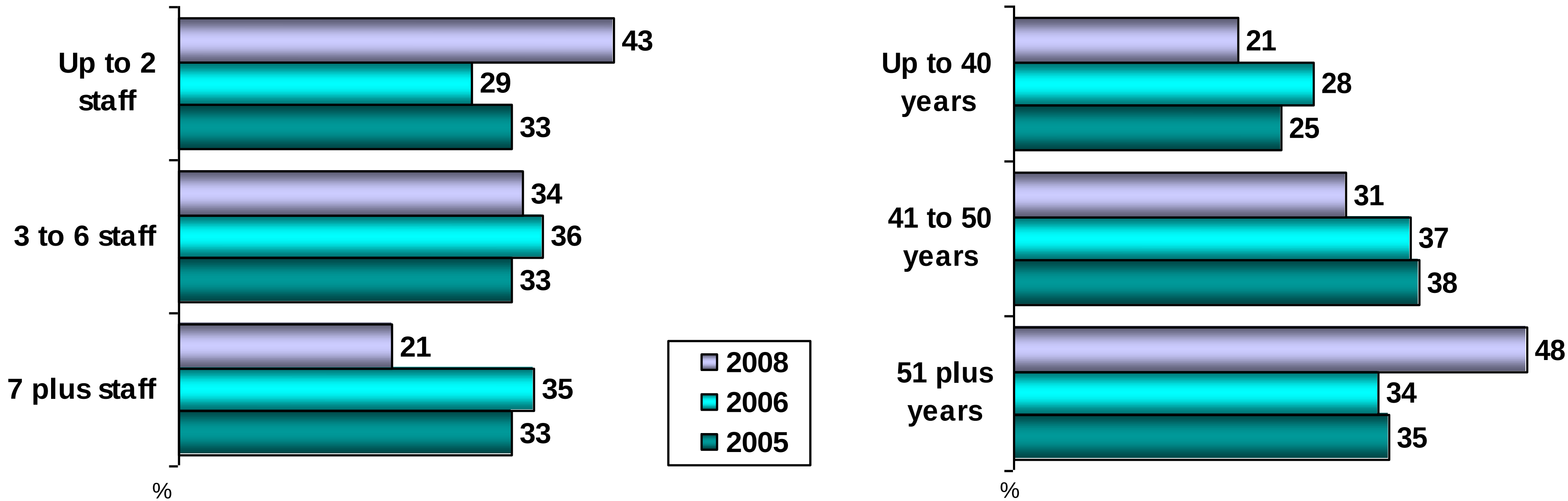
2006 Base: n=130 (All respondents). * 2006 Base: n= 110 (Commercial fishers)

2005 Base: n=201 (All respondents). * 2005 Base: n= 175 (Commercial fishers)

** Excludes Recreational fishers. # Statement worded differently to 2006 "I own and operate my own fishing business". Statements rotated.*

Respondent Profile

Full Time Staff Employed | **Age**



- In 2008, smaller operators were more prevalent in the survey than previous years (43% of respondents had just one or two staff members compared to 29% in 2006). Respondents were also older, with almost half (48%) aged over 50 years in 2008, compared with just over a third in 2006 (34%). Consistent with all previous waves, few operators were aged under 40 years (21% in 2008).

Q30. How many full time equivalent staff are employed in your business or organisation?
Q31. What is your approximate age?

2008 Base: n=160 (All respondents)
2006 Base: n=130 (All respondents)
2005 Base: n=201 (All respondents)
* May not add to 100% due to rounding. Don't know responses not included

Awareness, Knowledge & Understanding of FRDC

Spontaneous awareness of FRDC was significantly lower than in 2006

Unprompted Awareness of FRDC	2005 (n=201)	2006 (n=130)	2008 (n=160)
"FRDC" or full name	47%	48%	34% ↓
Very close to FRDC	3%	1%	6% ↑
Department of Agriculture/Department of Primary Industries	1%	2%	5%
State industry body/association*	-	-	3%
Federal Government	-	2%	1%
State Fisheries Managers	-	1%	1%
WAFIC / West Australian Fisheries Industry Council	-	-	1%
Seafood CRC	-	-	1%
Other	7%	11%	8%
Don't know	37%	25%	39% ↑

- Just over one third (34%) of respondents spontaneously identified the FRDC as the organisation responsible for investing in national fisheries R&D, which is significantly lower than the last survey (48%). Conversely, the proportion who stated something very close to the FRDC is significantly higher. Those who were significantly more likely to name the FRDC were:
  - Fishers aged 51+ (40%); and
  - Those involved in an industry association (41%).
- Nearly four in ten (40%) said they did not know which organisation was responsible for fisheries R&D, which is up significantly by fourteen percentage points.

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

2008 Base: n=160 (All respondents)
2006 Base: n=130 (All respondents)
2005 Base: n=201 (All respondents)
* New in 2008

↓ ↑ = Significant difference from previous year (at 95% confidence)

Although unprompted awareness of FRDC is down, total recognition remains quite high

FRDC Awareness	2005 (n=201)		2006 (n=130)		2008 (n=160)	
	Yes - Unprompted	Yes - Prompted	Yes - Unprompted	Yes - Prompted	Yes - Unprompted	Yes - Prompted
Aware of FRDC	47%	40%	48%	43%	34% ↓	51%
TOTAL AWARENESS (unprompted + prompted)	87%		92%		85%	

- Although somewhat lower than 2006, total awareness in 2008 was quite high at 85%. A fair degree of variation was evident by sector:
  - Aquaculture – 92%
  - Wild Catch – 77%
  - Post Harvest – 83%*
  - Recreational Fishing – 78%*

- Recreational fishers have higher unprompted awareness than Commercial fishers (50% and 32% respectively), while Commercial fishers have higher prompted awareness of FRDC (54%, and 28% Recreational fishers).

↓↑ = Significant difference from previous year (at 95% confidence)

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?

2008 Base: n=160 (All respondents)
2006 Base: n=130 (All respondents)
2005 Base: n=201 (All respondents)
* Small base sizes

Industry associations remained the top mentioned source for awareness of FRDC

Sources of Awareness of FRDC (Main Mentions)	2005 (n=168)	2006 (n=117)	2008 (n=136)
Industry Associations	50%	64% ↑	40% ↓
Fisheries Journals / Magazines	15%	20%	20%
Direct Contact	13%	12%	10%
Industry Newsletters / Publications	16%	31% ↑	9% ↓
FISH (formerly R&D News)	12%	3% ↓	9% ↑
WAFIC / West Australian Fisheries Industry Council	1%	5%	9%
Other Business Operators	12%	10%	4%
Government Departments	11%	7%	4%
FRDC Website	1%	5%	2%
Conferences	2%	9%	4%
Other	16%	5%	11%

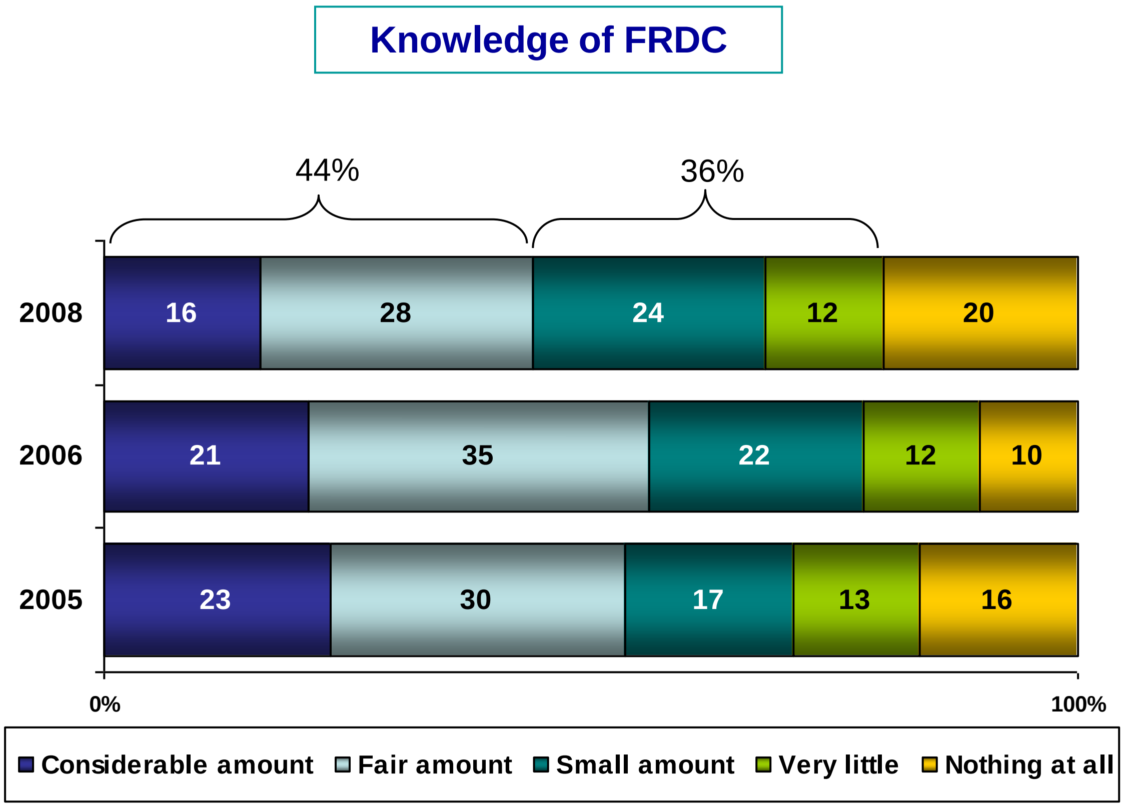
↓ ↑ = Significant difference from previous year (at 95% confidence)

- Although declining in importance, *Industry associations* remain the top mentioned source for awareness of FRDC (40% in 2008 vs. 64% in 2006).
- Publications such as *fisheries journals and magazines* (20%) were equally likely to be cited as sources, as in 2006.
- Notably, one in ten (10%) respondents had become aware of the FRDC through direct contact with the FRDC itself.
- Positively, people were more likely to have become aware of the FRDC via *FISH* than in 2006 (9% vs. 3% respectively).
- *Industry newsletters and publications* have declined in importance at 9% in 2008 versus 31% in 2006.

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

2008 Base: n=136 (Have knowledge of FRDC activities).
2006 Base: n=117 (Have knowledge of FRDC activities)
2005 Base: n=168 (Have knowledge of FRDC activities). Multiple response, percentages do not add up to 100%. *Main responses listed.

Respondents claimed to have good knowledge of FRDC's activities, but not as good as those in 2006



- Of all grassroots stakeholders, 44% claimed to have a *fair* to *considerable* level of knowledge about what FRDC does.
  - This is a somewhat lower result than in both 2006 and 2005 (56% and 53%, respectively) and the decline is most noticeable in the proportion rating their knowledge as *considerable* (from 23% in 2005 to 16% this wave). This is clearly a trend that FRDC should seek to reverse in order to better meet its strategic goals.
- Notably higher mentions were evident amongst:
  - Those who rate FRDC's performance highly; and
  - Those actively involved in industry associations.

Q3. How much would you say you know about what FRDC actually does? Would you say a…?

2008 Base: n=160 (All respondents)
2006 Base: n=130 (All respondents)
2005 Base: n=201 (All respondents)

Main understanding of FRDC's role is to carry out fisheries R&D, provide R&D funding and ensure sustainability

- As shown on the table on the next page, there is widespread understanding that FRDC's role is to *carry out R&D in the fishing industry, across commercial and/or recreational sectors* (52%).
  - In 2006 and 2005, *carry out R&D in fishing and aquaculture* was the second top response at 21% and 36% respectively.
- This was followed by the perception that FRDC is responsible for *funding fisheries R&D projects* (30%). This is something FRDC should seek to improve over time.
  - Similarly, in previous waves, *allocate / provide / administer funding for* R&D was mentioned by a similar proportion at 36% in 2006 and 41% in 2005.
- *Ensuring sustainability* is also perceived as one of FRDC's key roles (20%).
- Other perceived roles of the FRDC include:
  - *Check / determine fish stocks / ensure enough fish stock* (13%)
  - *Targeted R&D in response to industry requests* (13%)
  - *Governing body / rules & regulations* (7%)
  - *Funding provided by levy / fishing licences / Commonwealth Govt.* (7%)
  - *Marketing / global trends* (7%)
  - *Promote / foster / assist research projects* (7%)
  - *Operate on national basis / Australia wide research* (7%)

Q4. What is your understanding of FRDC's role and responsibilities?
2008 Base: n=136 (Have knowledge of FRDC activities) *New codes used in 2008. Multiple responses allowed – each respondent could have provided more than one mention. Main responses listed.*

FRDC's role is also understood to involve checking fish stocks and responding to industry requests

FRDC's Role & Responsibilities (Top Mentions, 5%+)	**2008**
Research & Development for fishing industry / commercial & recreational	52%
Funding / grants / fund research projects	30%
Ensure sustainability / environmentally / ecologically	20%
Check / determine fish stocks / ensure enough fish stock	13%
Targeted R&D in response to industry requests	13%
Governing body / rules & regulations	7%
Funding provided by levy / fishing licences / Commonwealth Govt.	7%
Marketing / global trends	7%
Promote / foster / assist research projects	7%
Operate on national basis / Australia wide research	7%
Promotion	6%
Develop new fisheries	5%
Develop more forms of aquaculture	5%
Other	7%
Don't know	13%

Q4. What is your understanding of FRDC's role and responsibilities?
2008 Base: n=136 (Have knowledge of FRDC activities). *New codes used in 2008. Multiple responses allowed – each respondent could have provided more than one mention.*

Main Understanding of FRDC's Role – Sample of Verbatim Comments

"Promote fisheries research and development on a national basis (across the country). They are also responsible for technological innovations and scientific research for the industry, also educational exchanges between different countries and encouraging study tours."

"They do research on fisheries, all sorts of things to do with fish stocks and things like that."

"As an organisation to distribute federal government funds for the benefit of fisheries in Australia."

"They are involved with seafood CRC. They look to work in partnership with industry sectors to do research for them."

"It has a charter that basically says they support the industry through targeted R&D, sustainability, profitability. (FRDC) Effectively disperse federal and state government contributions as well."

"They check on water quality and fish stocks. All I've seen is them checking the size of fish and tagging and stuff like that."

"To assist in all forms of research and to facilitate the development of projects that are relevant to the industry, and then co-ordinate with the research provider."

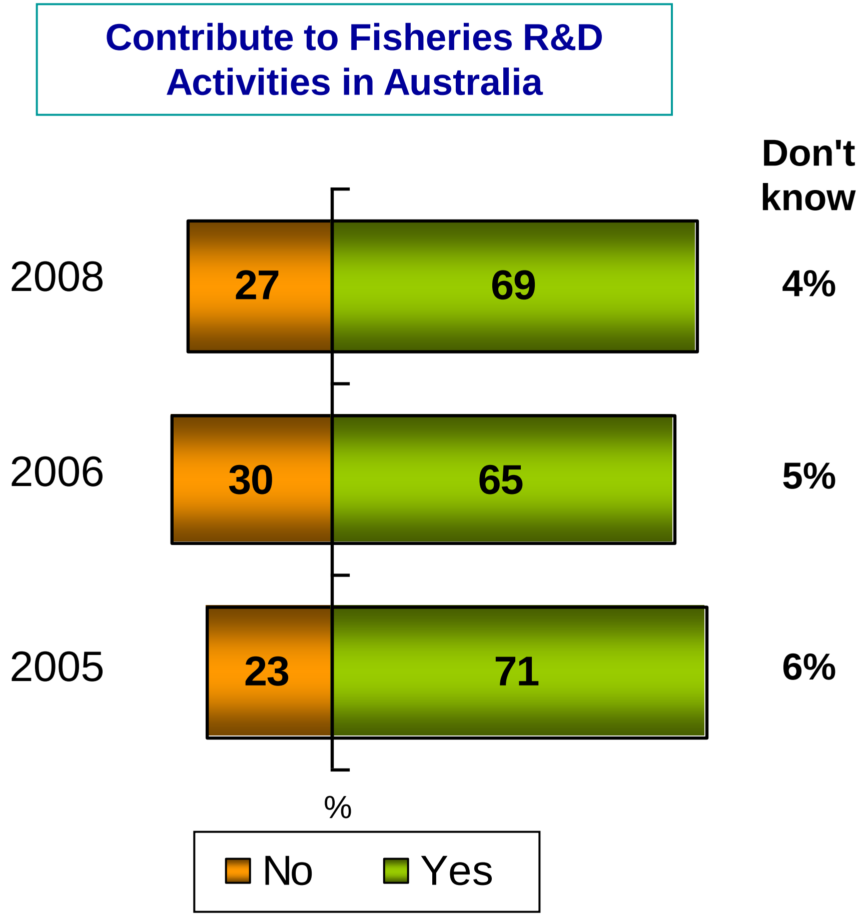
"To collect money from fisherman to use for research and development purposes."

"I know they invest in furthering fishing research - everything from marketing, process and fish health. They manage the research that's conducted with the fisheries."

"To help with research in regards to working out sustainable stocks."

"They are responsible for fisheries R&D in both wild fisheries and aquaculture. The primary organisation in Australia that leads R&D."

A large majority continue to contribute to fisheries R&D activities



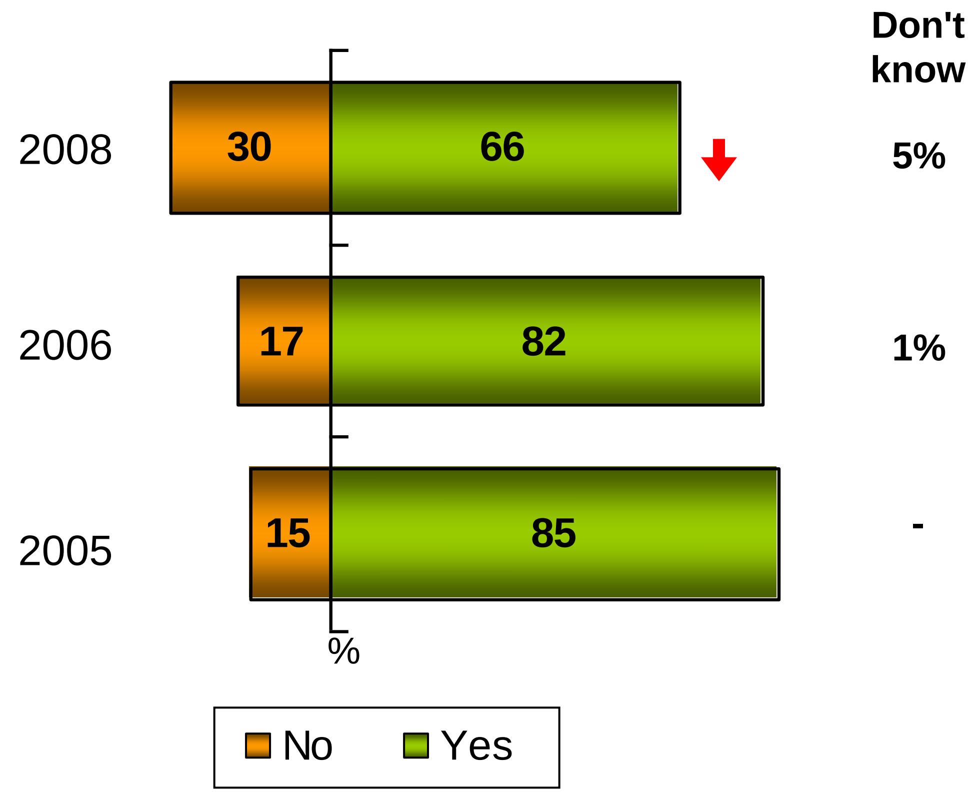
- Almost seven in ten (69%) stakeholders claimed they contribute towards fisheries R&D in Australia.
  - This represents a marginal increase of four percentage points since 2006 (65%).
  - Conversely, the proportion of non-contributors has decreased slightly from 30% to 27% in 2008.
- Operators who were significantly more likely to contribute were those who were:
  - Actively involved in an industry association (75%); and
  - Knowledgeable of FRDC (87%).
- These results indicate a high level of commitment to R&D at the grassroots level, and highlight the importance of encouraging grassroots operators to be more actively involved in industry associations, as well as increasing knowledge of FRDC.

Q10. Do you contribute towards fisheries R&D activities in Australia?

2008 Base: n=160 (All respondents)
2006 Base: n=130 (All respondents)
2005 Base: n=201 (All respondents)

Awareness that the contribution funds FRDC's R&D projects is significantly down in 2008

Aware that Contribution Assists in Funding FRDC R&D investments



- Of those who contribute towards fisheries R&D in Australia, two thirds (66%) are aware that the contribution assists in funding FRDC's R&D investments.
- This represents a significant decrease in awareness since 2006, from 82% to 66%, and is a trend that FRDC should seek to reverse.

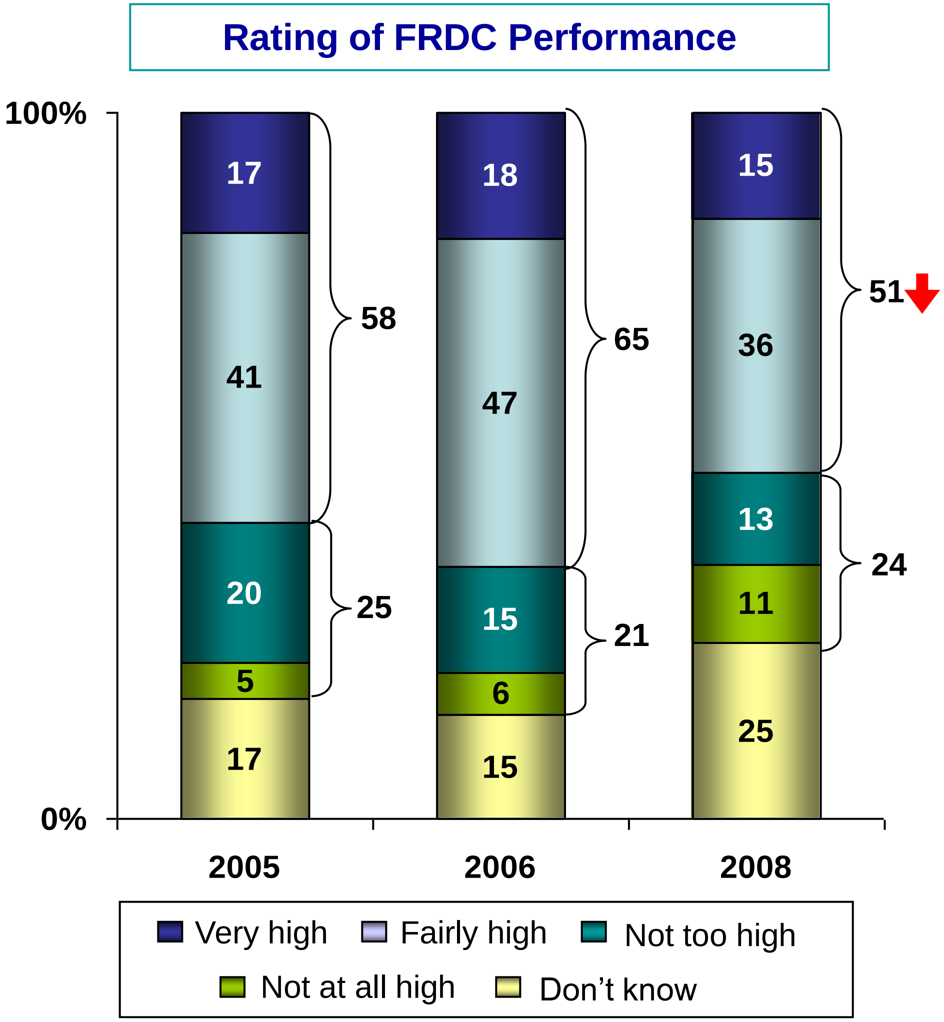
= Significant difference from previous year (at 95% confidence)

Q11. Are you aware that this contribution assists in funding R&D investments made by the FRDC?

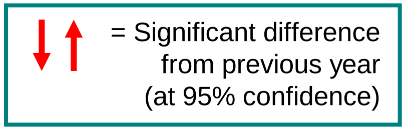
2008 Base: n=111 (Contribute to fisheries R&D in Australia)
2006 Base: n=78 (Contribute to fisheries R&D in Australia)
2005 Base: n=124 (Contribute to fisheries R&D in Australia)

Rating of FRDC's Performance

Overall performance ratings declined significantly in 2008



- Compared to 2006, of those who were aware of activities undertaken by FRDC, a significantly lower proportion of respondents rated its performance highly, as a funder of fisheries R&D (51% in 2008 vs. 65% in 2006).
  - This is the lowest rating of all three waves.
- Respondents who are involved in an industry association were significantly more likely to rate FRDC's performance highly compared to those who were not (60% vs. 25%). This highlights the importance of promoting FRDC's activities through industry associations, and potentially – on a more strategic basis – assisting industry associations to increase their member base.



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

2008 Base: n=136 (Have knowledge of FRDC activities)
2006 Base: n=117 (Have knowledge of FRDC activities)
2005 Base: n=168 (Have knowledge of FRDC activities)

FRDC is seen to be conducting worthwhile research, but some feel funding is misdirected

Reasons for Rating (Main unprompted mentions*)	2008
Net Positive Mentions:	**68%**
Major / essential source of funding / funds research	27%
Promote / develop fishing industry / beneficial to fishing industry	22%
Respond to industry development needs	12%
Aware of / been involved with funded projects	11%
Look after industry well / do good job	10%
Strict guidelines / assessment process / thorough project appraisal	9%
Commercially profitable projects / provide financial return	6%
Net Negative Mentions:	**32%**
Funding allocation misdirected / not going to relevant area of need	17%
Lack of funding	9%
Lack of benefits / evidence of research results	4%
Lack of attention to industry needs	4%

- Despite the decline in high ratings of FRDC, among those who provided a rating, most gave positive feedback about FRDC's performance (68%). These comments mainly related to:
  - Major / essential source of funding / funds research (27%)
  - Promote / develop fishing industry / beneficial to fishing industry (22%)
  - Respond to industry development needs (12%)
- However, one third (32%) provided negative comments:
  - Funding allocation misdirected / not going to relevant area of need (17%)
  - Lack of funding allocation to research (9%)

Q7. Why do you rate the FRDC…?

2008 Base: n=102 (Have knowledge of FRDC activities and provided a rating of FRDC's performance). * *Multiple response question, percentages do not add up to 100%. Does not include don't know responses.*

FRDC particularly well regarded for being a funding source and developing the industry

Reasons for Rating (Main unprompted mentions*)	**2008 (Q7)** (n=102)	**Net High Rating (Q6)** (n=136)	**Net Low Rating (Q6)** (n=136)
Net Positive Mentions:	**68%**	**-**	**-**
Major / essential source of funding / funds research	27%	41%	-
Promote / develop fishing industry / beneficial to fishing industry	22%	32%	-
Respond to industry development needs	12%	17%	-
Aware of / been involved with funded projects	11%	16%	-
Look after industry well / do good job	10%	14%	-
Strict guidelines / assessment process / thorough project appraisal	9%	13%	-
Commercially profitable projects / provide financial return	6%	9%	-
Net Negative Mentions:	**32%**	**-**	**-**
Funding allocation misdirected / not going to relevant area of need	17%	4%	42%
Lack of funding allocation to research	9%	-	27%
Lack of benefits / evidence of research results	4%	-	12%
Lack of attention to industry needs	4%	-	12%

Q7. Why do you rate the FRDC…?

2008 Base: n=102 (Have knowledge of FRDC activities and provided a rating of FRDC's performance). * *Multiple response question.*

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

2008 Base: n=136 (Have knowledge of FRDC activities)

Rating of FRDC's Performance – Sample of Positive Verbatim Comments

"They carry out essential funding, otherwise no research would get done. They are one of the focus points for directing funds for the best projects."

"Because I think they do a very good job compared to the old researchers we used to have. They cover a wider area - they cover aquaculture as well which is good. They bring together organisations."

"Because they have excellent corporate knowledge of what's required for the fisheries industry - their knowledge of the requirements of the industry."

"I feel that they're trying to respond to industry development needs."

"I think they're doing a wonderful job. Have priorities right/allocate funds on a fairly transparent and fair basis."

"They looking into research trying to protect the industries and they're doing the best job they can."

"I think they have good accountability and good directions/priorities are in the right context/they promote innovation."

"Because by its structure it enables co-investment and value for dollar."

"Very impressed with their efforts. It's good to have an organisation that understands what we are trying to achieve in the fishing industry."

Rating of FRDC’s Performance – Sample of Negative Verbatim Comments

“I would rate them higher if they focused more on recreational fishing, not just commercial fishing. Better support is needed for recreational fishing, development and extension areas need improvement.”

“We don't get our fair share to what we put in, that's the main reason. The percentage of it doesn't come back to us correctly.”

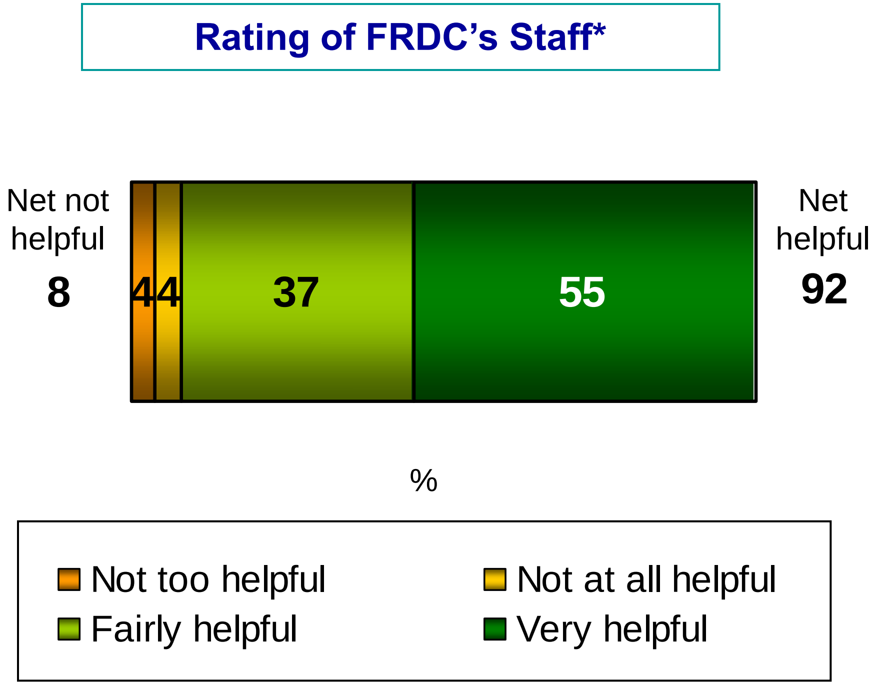
“Because some of their projects aren't necessary.”

“They don't listen to others, they just decide what they are going to do by themselves.”

“They're not down at the grassroots level, we don't get the support from them. Projects they support are not necessarily what the industry needs at times.”

“A lot of things they invest in and do research in are pointless to the type of fishing I am doing.”

FRDC's staff members are perceived as helpful



- Encouragingly, the majority of respondents rate FRDC staff highly (92%). Of these, 55% have provided a *very helpful* rating and 37% *fairly helpful* rating.
- It is noteworthy that a large proportion (55%) of all respondents who were aware of FRDC could not give a rating of its staff, which indicates that many grassroots operators have not been in direct contact with staff, or certainly not enough to feel they could rate them.
  - These respondents have been excluded from the adjacent chart.

Q8. Overall, how would you rate the staff of the FRDC? Would you say they are…

2008 Base: n=49 (Aware of FRDC and able to give rating). * *Base and proportions exclude don't know/can't say responses. New question in 2008.*

Rating of FRDC's Staff Performance – Sample of Verbatim Comments

"They're very responsive and they engage in all core responsibilities of recreational fisheries. They listen well, but mostly to commercial fisherman."

"I do know quite a number of them and have worked with them and have found them very helpful in the information they give."

"If the requests don't coincide with their agendas you seem to get nowhere."

"They are helpful in terms of assisting with developing proposals. They assist in development of projects, are very approachable, willing to listen and also willing to do something to help."

"Because they're switched on to what our needs are/they go out of their way to help."

"They are very intelligent. They make a decision to the best of their ability. They look strategically at the industry and make well informed decisions."

"They don't get to the actual fisherman. They don't communicate with us to obtain our views."

"Because they've taken the time to listen to us, taken the time to evaluate the project we are doing. They've come to visit us."

FRDC's people are most commonly seen as helpful, responsive, informative and accessible.

Reasons for Rating (Main unprompted mentions*)	2008
Net Positive Mentions:	**92%**
Past dealings / direct experience with staff	31%
Helpful / give assistance	24%
Responsive / respond to enquiries	22%
Supportive of industry activities	18%
Provide information	14%
Easily contactable / approachable	14%
Knowledgeable / make well informed decisions	13%
Easy to talk to / get along with	12%
Willing to listen	10%
Dedicated / passionate to project outcomes / their job	11%
Want to be involved / get you involved / work together	8%
Provide advice / suggestions	6%
Net Negative Mentions:	**12%**
Not helpful	10%
Unresponsive / lack of response to enquiries / requests	4%

- Encouragingly, of those who gave a rating of staff, the vast majority of respondents provided positive comments about the performance of FRDC staff (92%). These comments mainly related to:
  - Past dealings / direct experience with staff (31%)
  - Helpful / give assistance (24%)
  - Responsive / respond to enquiries (22%)
  - Supportive of industry activities (18%)
- One in ten (12%) provided negative comments, more specifically:
  - Not helpful (10%)
  - Unresponsive / lack of response to enquiries / requests (4%).

Q9. Why do you rate the staff of the Fisheries Research and Development Corporation as…?

2008 Base: n=49 (Have knowledge of FRDC activities and provided a rating of FRDC's staff).). * *Multiple response question, percentages do not add up to 100%.*

Attitudes and Mindset

Stakeholders more likely to perceive that R&D does not have a positive impact on their business, while nearly all still agree FRDC should interact more with all stakeholders

- Grassroots stakeholders continue to be 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.
  - Consistent with 2005 and 2006 results, the majority displayed levels of concern regarding the future outlook of the Australian fisheries sector (82%).
  - Contributions to R&D in the fisheries sector is highly regarded, with 66% agreeing that it is important (slightly lower than in 2006, at 72%).
  - However, two thirds indicated that it is very difficult to attain R&D funding (66%, which is somewhat higher than in 2006 at 60%).

- Within the fisheries business sector, FRDC's reputation has fallen slightly and an increasing proportion perceive that R&D is not having a positive impact on their business or organisation.
  - Nearly half of respondents agreed that R&D does not have a positive impact on their business (46%, significantly higher than 2006, 33%).
  - Half (49%) mentioned that FRDC generally receives positive word of mouth. This perception has fallen somewhat since 2006 (57%), but higher than 2005 (45%).
  - Consistent with 2005 and 2006 results, the vast majority feel it is vital that FRDC interacts more with stakeholders within the fisheries supply chain (93%).

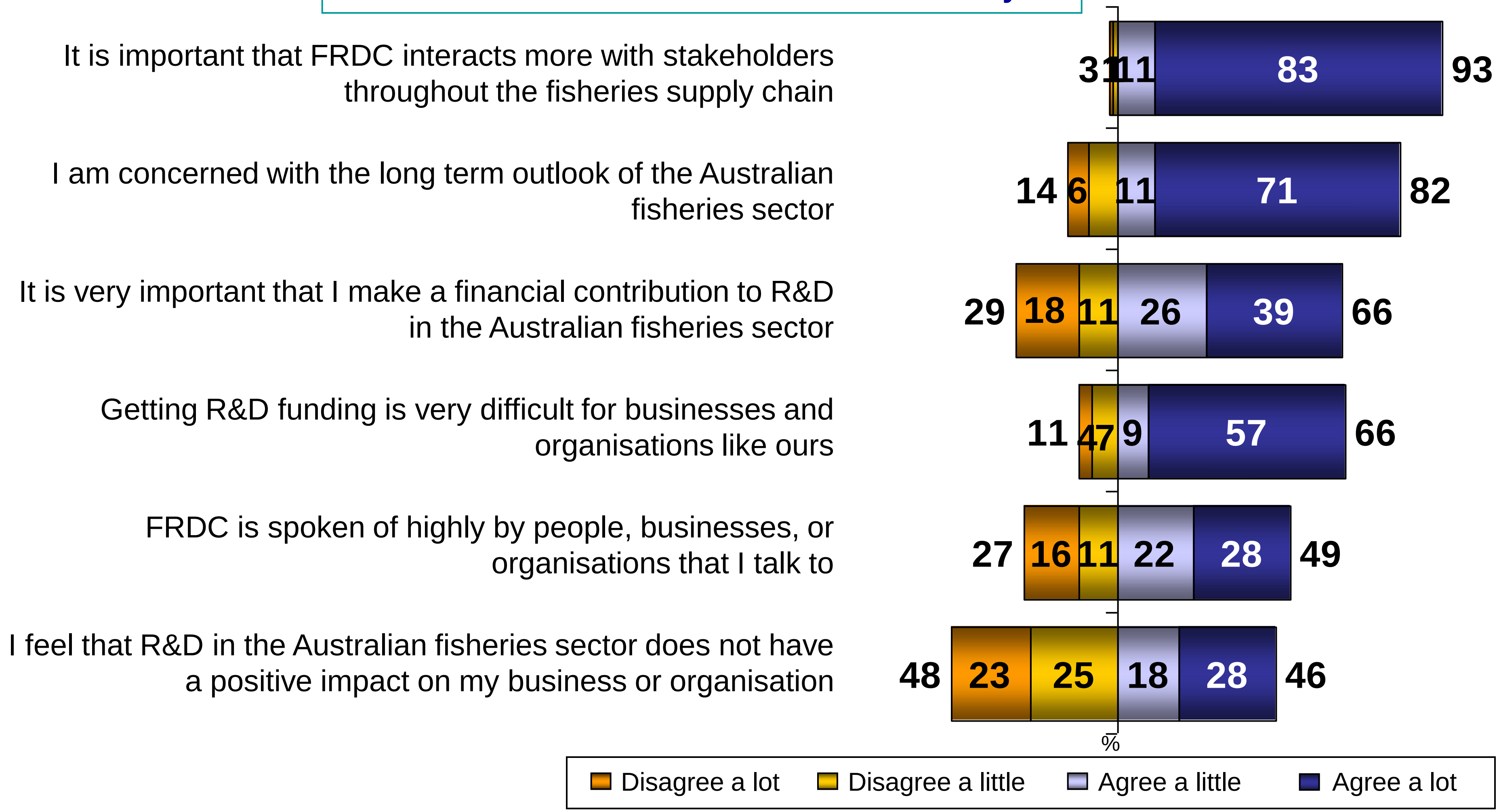
- These attitudinal results are charted and tabled on the following pages.

Q28. Do you agree or disagree with the following statements? Is that a lot or a little?

2008 Base: n= 160 (All respondents)
2006 Base: n=130 (All respondents)
2005 Base: n=201 (All respondents).

Attitudes Towards FRDC and R&D Generally

Attitudes Towards FRDC and R&D Generally



Q28. Do you agree or disagree with the following statements? Is that a lot or a little?

2008 Base: n=160 (All respondents). Does not include neither agree nor disagree or don't know responses.
2006 Base: n=130 (All respondents)
2005 Base: n=201 (All respondents)

= Significant difference from previous year (at 95% confidence)

Attitudes Towards FRDC and R&D Generally

Attitudes Attributes - level of agreement	2005 (n=201)		2006 (n=130)		2008 (n=160)	
	Net agree	Net disagree	Net agree	Net disagree	Net agree	Net disagree
It is important that FRDC interacts more with stakeholders throughout the fisheries supply chain	92%	4%	92%	7%	93%	3%
I am concerned with the long term outlook of the Australian fisheries sector	80%	17%	81%	14%	82%	14%
It is very important that I make a financial contribution to R&D in the Australian fisheries sector	74%	17%	72%	26%	66%	29%
Getting R&D funding is very difficult for businesses and organisations like ours	60%	14%	60%	22%	66%	11%
FRDC is spoken of highly by people, businesses, or organisations that I talk to	45%	29%	57% ↑	28%	49%	27%
I feel that R&D in the Australian fisheries sector does not have a positive impact on my business or organisation	39%	53%	33%	59%	46% ↑	48%

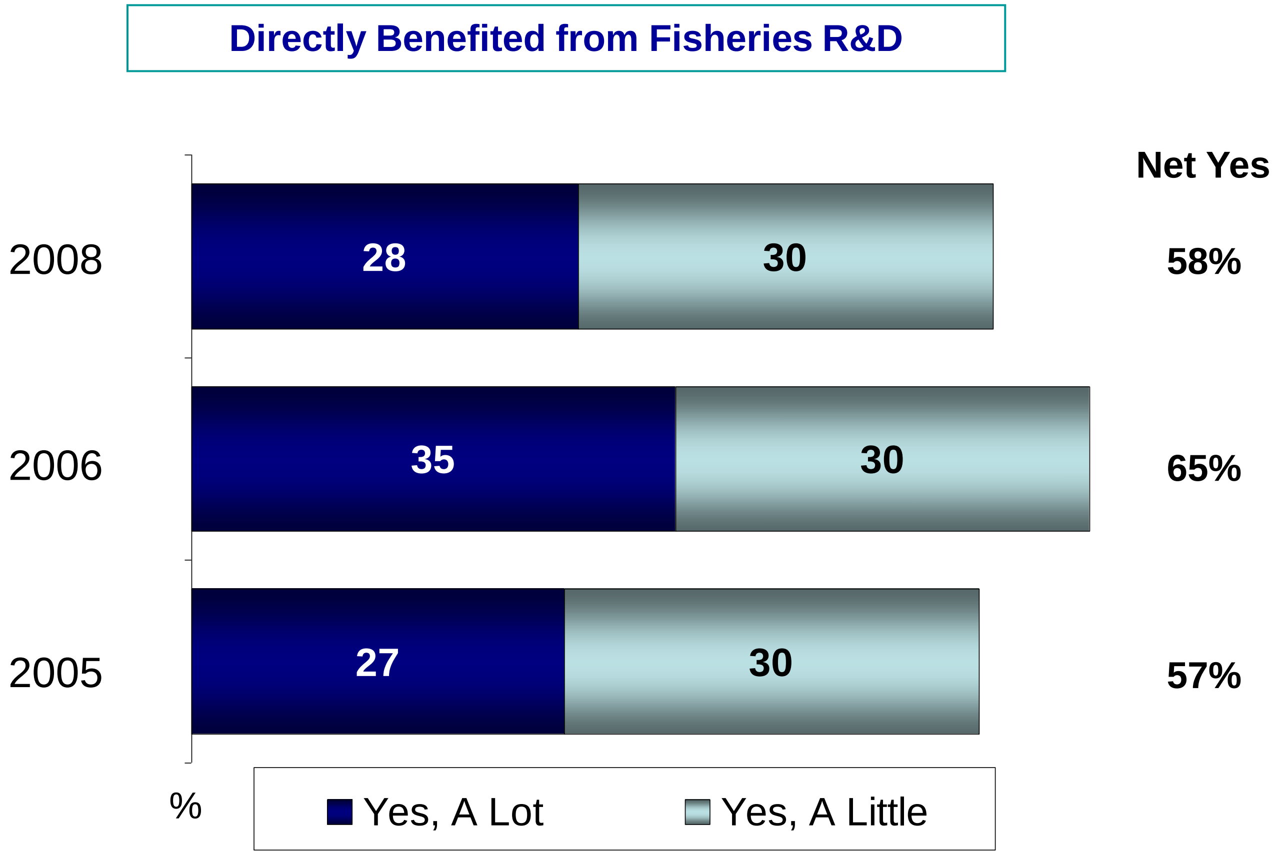
Q28. Do you agree or disagree with the following statements? Is that a lot or a little?

2008 Base: n=160 (All respondents). Does not include neither agree nor disagree or don't know responses.
2006 Base: n=130 (All respondents)
2005 Base: n=201 (All respondents)

↓ ↑ = Significant difference from previous year (at 95% confidence)

Perceived Benefits from Fisheries R&D

Majority still claim to have experienced direct benefits from fisheries R&D



- Similar to previous waves, the majority (58%) report to have directly benefited from R&D activities in the past 5 years.
  - Notably, those who claim to have benefited *a lot* (28%) also rate FRDC highly (*very* or *fairly)* at 48%.

Q12. In general, do you feel you have directly benefited from any research and development or extension activities or initiatives undertaken in relation to fisheries in Australia, in the past 5 years, whether in association with FRDC or not?

Base: n=160 (All respondents).

Wording of this question has changed in 2008 but this has not changed the meaning of the question.

Breeding and genetics program initiatives, hatchery stock improvement and sustainability initiatives mentioned as most significant

Most Significant R&D Activity Benefited From (Main Mentions Only, 3%+)	**2008**
Breeding/genetics program initiatives	16%
Hatchery stock/fast growing/growth improvement	13%
Sustainability initiatives/protecting fishing industry	12%
Species specific R&D / various named fish / seafood R&D projects (including rock lobster, giant crab, tuna, local shark, blue swimmer crab, murray cod, glass eel)	11%
Environmental/ecological work	10%
Single mention industry projects (general)	5%
Feed/food research/feed quality	5%
Fish disease/fish health activities/initiatives	5%
Information collation/dissemination/gained knowledge	5%
Square mesh codends/fin fish trawl catch exclusion	5%
Quota management/bag limits/reduction in commercial netting/closed seasons	4%
Have not benefited from one most significant activity/initiative	3%

Q13. What is the one most significant R&D activity or initiative you have directly benefited from in the past 5 years?

2008 Base: n=93 (Those saying they have directly benefited from fisheries R&D in last 5 years).

New question in 2008.

Breeding and genetics program initiatives and species specific R&D projects are the most significant FRDC activities benefited from

- As shown in the table on the following page, stakeholders who have benefited from R&D activity in the past five years claimed to have specifically experienced benefits from FRDC in terms of:
  - Breeding / Genetics program initiatives – 10%, slightly lower than 2006 (16%)
  - Species specific R&D projects – 10%
  - Information collation – 6%

- Other benefits from FRDC activity mentioned in smaller proportions included:
  - *Funding / Grant initiatives* – 4%, significantly lower than 2006 at 18%
  - *Square mesh cod ends / Fin fish trawl catch exclusion* – 4%
  - *Sustainability initiatives / protecting fishing industry* – 3%
  - *Hatchery stock / fast growing / growth improvement* – 3%
  - *Fish stock assessment / management* – 3%

- When considering the differences between all benefits experienced by grassroots operators and those specifically associated with FRDC activities, it appears that these stakeholders have enjoyed gains in a number of areas from non-FRDC sources. In particular, this includes hatchery improvements, sustainability, and environmental / ecological knowledge. These may be areas in which FRDC could consider stepping up its focus in order to better meet the needs of grassroots stakeholders going forward.

Q14. What is the one most significant R&D activity or initiative you have directly benefited from specifically as a result of FRDC in the past 5 years?

2008 Base: n=93 (Those saying they have directly benefited from fisheries R&D in last 5 years).

Breeding and genetics program initiatives and species specific R&D projects are the most significant FRDC activities benefited from

Most Significant R&D Activity Benefited From as a Specific Result of FRDC	2005 (n=115)	2006 (n=85)	2008 (n=93)
Breeding/genetics program initiatives	9%	16% ↑	10%
Species specific R&D projects / various named fish / seafood R&D projects (abalone, rock lobster, giant crab, tuna, local shark, blue swimmer crab, murray cod, scallop, glass eel, black jewfish)**	-	-	10%
Information collation/dissemination/gained knowledge	-	6%	6%
Funding/grant initiatives/funded project	10%	18% ↑	4% ↓
Square mesh cod ends/fin fish trawl catch exclusion**	-	-	4%
Sustainability initiatives/protecting fishing industry	5%	6%	3%
Hatchery stock/fast growing/growth improvement	3%	4%	3%
Fish stock assessment/management	7%	4%	3%
No single activity	15%	9%	12%

↓↑ = Significant difference from previous year (at 95% confidence)

Q14. What is the one most significant R&D activity or initiative you have directly benefited from specifically as a result of FRDC in the past 5 years?

2008 Base: n=93 (Indicated benefited from fisheries R&D in past 5 years). M*ain responses only. **New codes for 2008.*

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)

The main benefits from R&D were: better product, increased efficiency and greater knowledge

How Benefit From Activity	2006 (n=74)	2008 (n=93)
Understanding of stock breeding and breeding lines (aquaculture)*	-	18%
Increased efficiency	26%	13% ↓
Better product	30%	10% ↓
Greater knowledge & awareness	23%	9% ↓
Market development	8%	5%
Increased price/financial benefit	14%	4% ↓
Cost saving	8%	4%
Water quality improvement*	-	2%
No benefit*	-	23%
Other	5%	10%

- Some changes are evident in the perceived benefits of FRDC's activities.
- A new, specific benefit about understanding stock lines has emerged with18% saying they experienced benefits through *understanding of stock breeding and breeding lines;*
- Meanwhile, respondents were significantly less likely to mention a range of benefits compared with 2006:
  - 13% benefited through *increased efficiency* (vs. 26% in 2006);
  - 10% benefited through *better product* (vs. 30%);
  - 9% gained *greater knowledge and awareness* (vs. 23%); and
  - Just 4% claimed a *financial benefit* (vs. 14%).

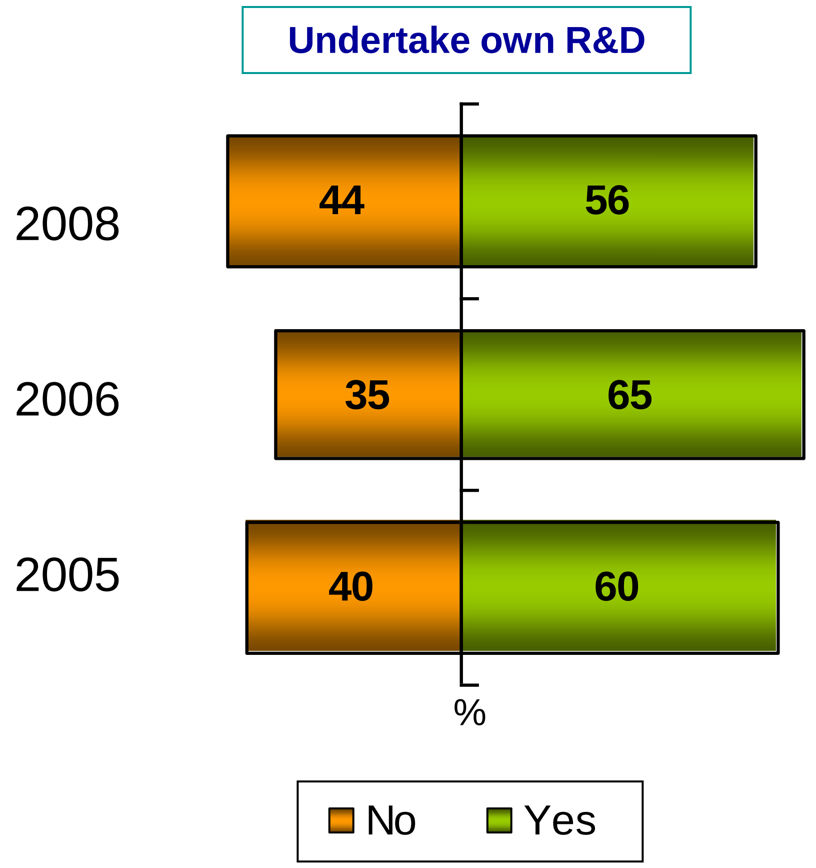
↓ ↑ = Significant difference from previous year (at 95% confidence)

Q15. How did you benefit from this activity?

2008 Base: n=93 (Indicated activity benefited from fisheries R&D in past 5 years)
2006 Base: n=74 (Indicated activity benefited from fisheries R&D in past 5 years)
*New code in 2008

Conduct of Own R&D

Just over half of grassroots operators undertake their own R&D



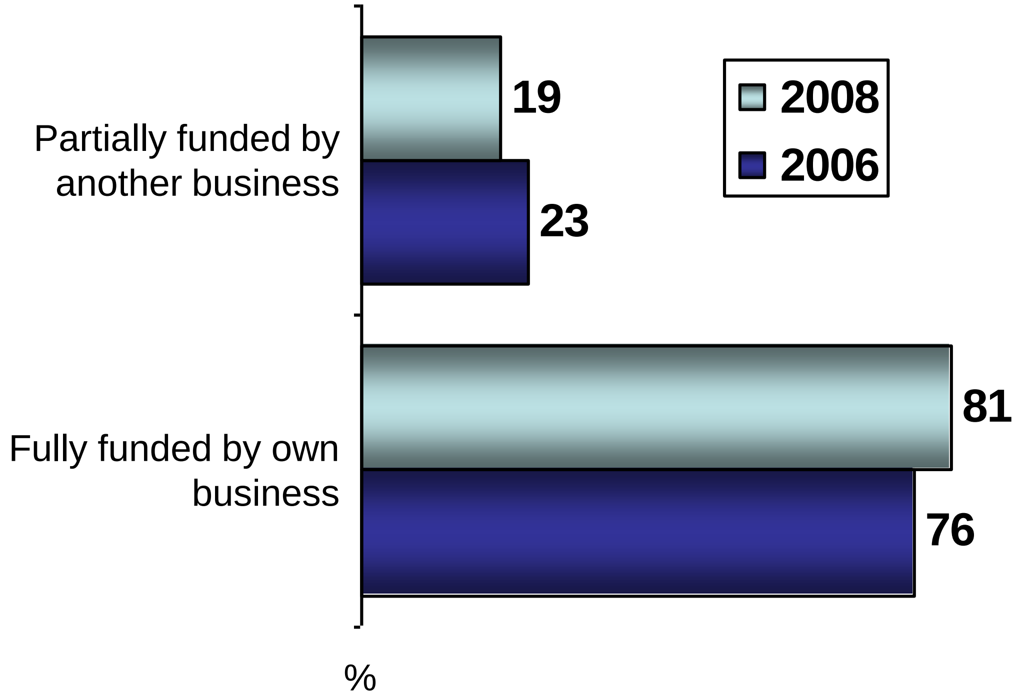
- Just over half of those surveyed claimed that they conduct their own R&D (56%, somewhat lower than 2006, 65%).
  - Those more likely to undertake their own R&D tend to be organisations that are:
    - In Tasmania (80%)
    - Involved in wild caught fish (75%)
    - Commercial (58%)

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

2008 Base: n= 160 (All respondents)
2006 Base: n=130 (All respondents)
2005 Base: n=201 (All respondents)

Most grassroots stakeholders doing their own R&D are fully funding it

Research Self-Funded?



- Of those respondents who undertake their own R&D, the majority (81%) indicated that their organisation fully funds it (slightly higher than in 2006; 76%). This reflects their sentiment that it is difficult to get funding.
- One fifth (19%) of respondents report that R&D is partially funded by another business (a slight decrease from 2006; 23%).
- The main organisations which have partially funded their R&D include:
  - Aus Industry
  - State Departments of Primary Industries & Fisheries
  - SARDI (South Australian Research Development Industry)
  - FRDC
    - Note: A full list is included in Appendix 4

Q23. Is this research funded by your organisation or another?

Base: n=89 (Conduct own R&D)
Base: n=84 (Conduct own R&D)
New question in 2006.

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

Who Would You Contact for Conduct of R&D?

Contact for Conduct of R&D	2005 (n=201)	2006 (n=130)	2008 (n=160)
Industry association	45%	44%	46%
Government department	23%	18%	23%
Private consultant	8%	13%	11%
Fellow business operators	16%	8% ↓	12%
Other	6%	15%	8%

↓↑ = Significant difference from previous year (at 95% confidence)

- Stakeholders cited a variety of organisations they would contact if they were looking at conducting research.
- Consistent with previous survey waves, nearly half nominated industry associations as the main point of contact if they were looking to undertake research (46%).
  - This was more pronounced among South Australian respondents (66%).
- Similar to previous waves, almost one quarter would contact a Government department (23%).
- Stakeholders were less likely to seek the advice of a private consultant or fellow business operators (11% and 12% each).

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…

2008 Base: n=160 (All respondents)
2006 Base: n=130 (All respondents)
2005 Base: n=201 (All respondents)

Stock assessment and growth trials are the main type of R&D undertaken by stakeholders

Types of R&D Undertaken	2008	Aqua-culture	Wild Catch
Stock assessments	67%	70%	67%
Growth trials / improvements	65%	50% ↓	91%
Machinery / equipment advances	63%	65%	67%
Environmental assessments	61%	59%	69%
Marketing / new markets	56%	61%	56%
Mortality rates	56%	46% ↓	67%
Processing / handling system	53%	57%	58%
Product development	48%	50%	53%
Breeding / genetics	40%	24% ↓	64%
Feed trials	35%	30%	44%
Tagging	29%	33%	18%

- A broad range of R&D projects have been undertaken, with *Stock assessments*, *growth trials, machinery / equipment advances* and *environmental assessments* the most commonly mentioned types of projects.

↓ ↑ = Significant difference between sectors (at 95% confidence)

Q25. What type of fisheries R&D have you undertaken?

2008 Base: n=89 (Conduct own R&D) Read out.

Main mentions only.

FRDC has provided funding to more than one in ten grassroots stakeholders; a significant gain

Organisations that Have Provided R&D Funding*	2005 (n=201)	2006 (n=130)	2008 (n=160)
FRDC	3%	4%	13%↑
Own business	2%	19%↑	11%
Dept. of Primary Industry	3%	2%	10%↑
State Government	4%	2%	8% ↑
Industry body/association	-	-	6%
Federal Government	2%	4%	5%
Aus Industry	4%	2%	5%
CRC	1%	2%	4%
CSIRO	1%	2%	2%
Never applied / received funding	72%	25%↓	58%↑

- A number of organisations have provided R&D funding, with the main ones including:
  - FRDC (13%, significantly higher than in 2006 at 4%);
  - Dept of Primary Industry (10%, significantly higher than in 2006 at 2%); and
  - State Government (8%, higher than in 2006; 2%).
- Compared to 2006, a significantly higher proportion has never received or applied for funding (58% in 2008 vs. 25% in 2006).
  - Notably, these respondents are more likely to say they have no knowledge about FRDC (88%).

↓↑ = Significant difference from previous year (at 95% confidence)

Q26. Can you possibly tell me the names of the organisations who have provided you with R&D funding in the past?

2008 Base: n=160 (All respondents)
2006 Base: n=130 (All respondents)
2005 Base: n=201 (All respondents).*Question wording has changed slightly from 2006. These changes have not altered the meaning of the original question. *Main mentions only. Multiple response, percentages do not add up to 100%*

Fish stock assessment mentioned most frequently as a future R&D need

- There was a range of suggestions made for future R&D focus, most commonly including *fish stock assessment / monitoring, environmental ecological sustainability research, various named fish /seafood research* and *market / promote Australian / local fish / seafood.*

Suggested Future Research and Development Needs for FRDC (Main Mentions Only 6%+)	**2008**
Fish stock assessment / monitoring	18%
Environmental / ecological sustainability research	15%
Various named fish / seafood research	15%
Market / promote Australian / local fish / seafood	14%
Genetics / breeding / life cycles / growth rates	10%
Profitability / maximise returns / research with commercial value	10%
Fish health / nutrition	9%
Aquaculture industry promotion/development	9%
Provide more information to industry / research results	9%
Production efficiency	7%
Rock lobster / crayfish	6%
Water quality / affects of pollution / chemical contamination	6%
Equipment / machinery development / more efficient fishing gear	6%
Other	11%
Don't know	14%

Q27. What Research and Development do you think FRDC needs to do in the future?
2008: n= 160 (All respondents). New question in 2008. **Main mentions only.*

Information and Communications

Industry associations remain a critically important source of business information & advice

Point of Contact for Information or Advice*	2006 (n=130)	2008 (n=160)
Industry body/association	49%	41%
Dept of Fisheries \ Primary Industries	22%	35%↑
WAFIC / West Australian Fisheries Industry Council**	-	7%
Other business operators	18%	7%↓
Government departments	10%	6%
Private consultant	4%	4%
FRDC website	5%	3%
FRDC other	4%	2%
Industry newsletters/publications	5%	1%↓
SARDI / South Australian R&D Institute	5%	1%↓
Other website	7%	1%↓
Other	15%	12%
Never sought information or advice	5%	11%↑

- A range of sources are used for business related information and advice. Main sources include:
  - Industry associations (41%)
  - Dept. of Fisheries (21%, which is significantly higher than in 2006, 9%)
  - Dept. of Primary Industries (14%)
- In 2008, a significantly higher proportion had never sought information or advice (11% vs. 5% in 2006).
- Thus, industry associations remain a key channel for FRDC to reach grassroots operators, and to promote its activities.

↓↑ = Significant difference from previous year (at 95% confidence)

Q16. When seeking information and advice relating to your fishing business, who do you contact or where do you go?

2008 Base: n=160 (All respondents).
2006 Base: n=130 (All respondents). *Multiple response, percentages do not add up to 100%.*Main mentions only,**New code in 2008.*

Information on regulatory matters and management advice are most commonly sought

Types of Information & Advice*	2008
Regulatory matters / rules & regulations / changes / entitlements	23%
Management advice / fishery management	19%
Government policies / policies / restrictions	9%
Licences / licence fees	8%
Quota's / fish sizes	8%
Stock / catch assessments / re-stocking	8%
Industry developments	8%
Fish health / nutrition	7%
Marketing issues	7%
Sustainability / environmental issues	7%
Fish disease / disease management	6%
Breeding / genetics	6%
Closures	6%
Funding / how to get funding	6%
Current / latest research / latest R&D	5%
Don't seek advice / no information sought	14%

Q17. What type of information or advice do you seek from these sources?

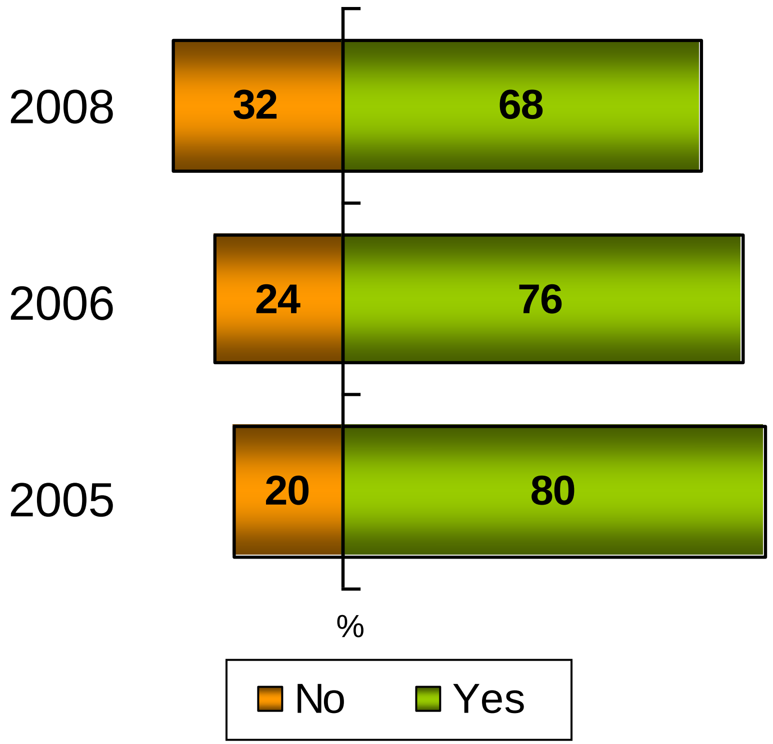
2008 Base: n=160 (All respondents). New codes in 2008. * *Main mentions only.*

- A wide range of information or advice is sought. The two main types include:
  - *Information on regulatory matters* (23%, similar to 2006, 25%); and
  - *Management advice / fisheries management* (19%).
- Notably, 14% reported that they don't seek or have not sought advice or information.

FISH Appraisal

The majority continue to read "FISH"

Read "FISH"
(formerly R&D News)



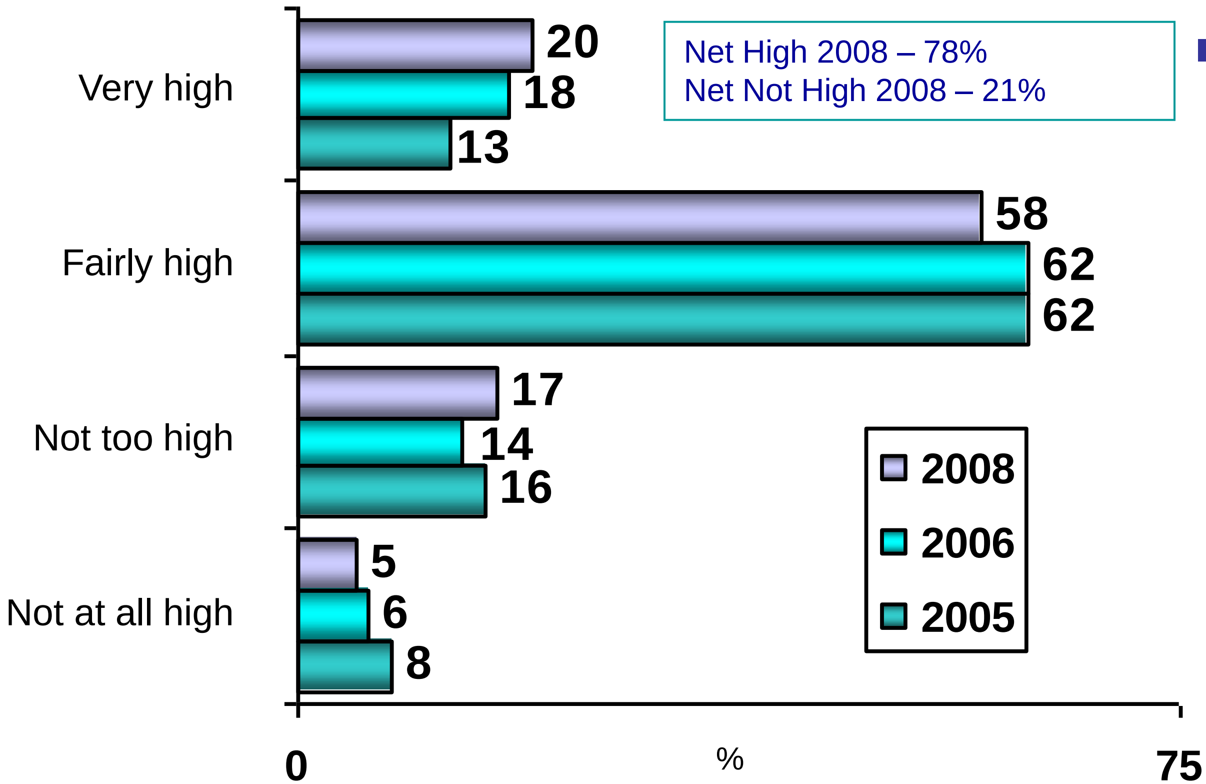
- Just over two-thirds of stakeholders read FISH *regularly, occasionally* or *rarely* (68%).
  - This is a slight decrease of 8 percentage points since 2006 (down from 76%).
  - Notably, almost half (46%) of stakeholders reported reading FISH *regularly*. These are more likely to:
    - Be in QLD or WA (63% and 56%, respectively);
    - Be older (aged 51+ yrs) – 56%;
    - Have considerable or fair knowledge about FRDC (70%); and
    - Rate FRDC's performance highly (71%).

Q18. Do you read the publication "FISH" (formerly called R&D news)?

2008 Base: n=160 (All respondents)
2006 Base: n=130 (All respondents)
2005 Base: n=201 (All respondents)

"FISH" is rated highly as a source of industry information

Rating of "FISH"- (formerly R&D News)



- A large proportion of stakeholders who read FISH rated the publication highly overall (78%), with 20% rating it *very high* and 58% *fairly high*.
  - This is very similar to the 80% recorded in 2006, and indicates a continued positive trend in very high ratings from 13% in 2005 to 18% in 2006 and 20% this wave.
  - Those who rate FISH highly:
    - Rate FRDC highly (90%).
    - Have considerable or fair knowledge about FRDC (88%).

Q19. Overall, how do you rate FISH as a publication for delivering fisheries R&D information to you? Would you say…

2008 Base: n=109 (Read "FISH", formerly R&D News)
2006 Base: n=99 (Read R&D News)
2005 Base: n=160 (Read R&D News)

"FISH" continues to be recommended, but can be improved still

% Answering Yes	2005 (n=160)	2006 (n=99)	2008 (n=109)
I am on the mailing list	Not asked	81%	86%
I'd recommend the publication to others in my industry	78%	80%	71%
It keeps me updated on what's happening in my industry	74%	76%	68%
The mix of stories is just right	Not asked	72%	68%
There is a need to make the publication more interesting to read	53%	54%	49%
Articles lack enough detail	Not asked	29%	27%
Articles are usually too technical	26%	23%	20%
Articles are usually too short	Not asked	25%	10% ↓

↓ ↑ = Significant difference from previous year (at 95% confidence)

- The base of stakeholders on the mailing list of FISH has increased slightly in 2008 (86%) compared to 2006 (81%) so distribution does not appear to be the reason for the decline in readership.
- Across some key measures related to FISH, slight decreases are observed.
- Although a lower proportion than in 2006, the majority claimed they would *recommend FISH to others in the industry* in 2008 (2008: 71% vs. 2006: 80%).
- Measures with relatively low ratings and in need of attention are:
  - *There is a need to make the publication more interesting to read* (49%);
  - *It keeps me updated on what's happening in my industry* (68%); and
  - *The mix of stories is just right* (68%).

Q20. Please answer yes or no to the following statements relating to FISH?

2008 Base: n=109 (Read FISH, formerly R&D News)
2006 Base: n=99 (Read R&D News)
2005 Base: n=160 (Read R&D News)

Conclusions & Recommendations

Conclusions & Recommendations – Key Stakeholders

In conclusion, the qualitative research with key FRDC stakeholders shows that:

1) **Broad awareness of FRDC's role and offer exists, but there is a lack of knowledge about specific objectives, programs and initiatives** – Ipsos recommends that FRDC raises awareness and understanding in these areas among key stakeholders by means of integrated communications, i.e. utilising a mixture of communication tools such as website, *FISH* magazine, meetings and conferences.

2) **Stakeholders would like more strategic involvement with the FRDC and a more formal consultative process when it comes to creating FRDC 'themes' and strategic direction so that FRDC and stakeholder priorities match more closely** – Ipsos recommends that FRDC considers implementing a formalised consultative process incorporating national strategy consultative meetings, stakeholder provision of strategic plans to FRDC, and interactive stakeholder consultation on draft FRDC plan. Below is an illustration of the suggested process:

Annual stakeholder meeting to discuss strategic issues → Stakeholders send their strategic plans to FRDC → FRDC considers plans and develops 'themes' → Stakeholder meeting/s or process to provide feedback on draft FRDC plan → FRDC finalises plan and distributes to stakeholders

Conclusions & Recommendations – Key Stakeholders cont'd

3) **Stakeholders expect that relevant outcome-driven projects are funded, and where relevant on a national level. FRDC is expected to integrate project knowledge and draw broader and more strategic conclusions and implications** – Ipsos recommends that the FRDC considers conducting meta-analysis of existing research studies and preparing special reports by topics, which are widely distributed among stakeholders.

4) **There is a perceived lack of performance measurement of Government fisheries research spending, return on research investment to FRDC contributors, and success of research extension** – Ipsos recommends that the FRDC considers developing methodologies to measure and report on these aspects.

5) **In addition to informal interaction, stakeholders would like more formalised and regular contact, mainly initiated by the FRDC** – Ipsos recommends that the FRDC implements a system of contacting stakeholders regularly via phone, email and face-to-face to discuss matters of relevance and importance to them and gain deeper understanding of their needs and expectations.

Conclusions & Recommendations – Key Stakeholders cont'd

6) **All communication tools are generally well received by stakeholders**; however the following improvements are suggested:

- ***FISH*** – there is a perception that the readership of FISH magazine among grassroots could be improved. The current direct mailing process appears effective in distributing *FISH,* but articles should remain relevant, short and simply written in 'fisher speak'.
- **Website** – needs improvements in design, navigation, application lodgement process, searchability, indexing and up-to-date news and information.
- **Research Reports** – there is concern that these are quite technical and scientifically written, and only available at a charge and in hardcopy. So, it is suggested that these reports are made available free of charge in the spirit of industry development and written in simple language, with executive summaries that are succinct and outcome-oriented.

Conclusions & Recommendations – Grassroots Stakeholders

7) **Overall awareness of FRDC and knowledge about its activities is quite high among grassroots stakeholders. However, unprompted awareness has declined, suggesting that FRDC is less top of mind for these stakeholders than in 2006. Furthermore:**
   - In 2008, grassroots stakeholders were less aware that contributions made by them assist in funding FRDC investments.
   - Industry associations remain a key channel for FRDC to reach grassroots operators and promote its activities.
   - The FISH publication is widely read by grassroots stakeholders and highly regarded as a source of industry information. However, opportunities exist to make it more interesting to read and to provide more timely industry updates.

8) **Raising familiarity of key roles and activities of FRDC would be important in ensuring that grassroots stakeholders recognise FRDC's work and its relevance to them, whilst also hopefully making the organisation more top of mind.**

9) **Ipsos recommends that the FRDC utilises all available information tools to increase knowledge about its activities and R&D investments. These tools could include FISH and other relevant industry publications, industry associations, conferences, and the FRDC website.**
   - Further research could also be conducted to better understand grassroots stakeholder preferences and expectations regarding FISH, the website and other communications, to increase readership and satisfaction.

Conclusions & Recommendations – Grassroots Stakeholders cont’d

10) **The overall performance rating for FRDC declined in 2008, mainly due to perceptions that funding allocation is being misdirected or is lacking, and due to increased perceptions that fisheries R&D does not have a positive impact on grassroots businesses.**

- Notably, more than half of those who were aware of FRDC could not rate its staff, which indicates that many grassroots stakeholders are not in direct contact with staff, or certainly not enough to feel they can rate them. Those who could rate the staff provided high ratings, particularly in terms of helpfulness, responsiveness, approachability, knowledge and dedication.
- Although the majority of grassroots stakeholders claim to have experienced direct benefits from fisheries R&D (58%), this has declined somewhat since 2006 (from 65%), after what appeared to be an improvement from the 2005 survey (at 57%). It would be prudent for FRDC to take steps to better understand and arrest this apparent trend. It may be a perceived lack of benefit, which could be addressed through communications, or an actual lack of direct benefits, which may require a different approach to R&D activities to deliver wider benefits.
- In terms of future R&D needs, the top desires among these stakeholders were for fish stock assessments, environmental sustainability research, specific species research, and research into marketing and promoting local seafood. Indeed, a large proportion of grassroots stakeholders claimed that they conduct their own R&D. Of these, most are fully funding these projects and more than half have never received FRDC funding.

11) **To increase its overall performance rating, Ipsos recommends that FRDC strives to raise its profile amongst grassroots stakeholders through increased interaction and engagement throughout the fisheries supply chain, with effective communication of the benefits of its activities. Some consideration should also be given to better meeting grassroots operator needs and expectations in relation to funding allocations across the industry.**

- Industry associations remain the main point of contact for sourcing information and the conduct of research – as such they should continue to serve as an essential conduit between grassroots businesses and the FRDC.

Appendices

Appendix 1

In-depth Discussion Guide

To be included in the final version

Appendix 2
CATI Questionnaire

To be included in the final version

Appendix 3

Membership of Commercial Fishing Sectors

Respondent Profile – Membership of Commercial Fishing Sectors

Respondent Type- Commercial Fishing Organisations*	Membership (n=142)
Snapper	2%
Australian Prawn Farmers (APF)	2%
Estuary Prawn Trawl Fishery	2%
Dept of Primary Industries	2%
Clarence River Fisherman's Co-Operative	2%
Murray River Cod	2%
Silver Perch	2%
Trout	1%
Southern Bluefin Tuna (SBT)	1%
Australian Bass / Bass	1%
Wild Catch Abalone (A)	1%
Sydney Rock Oyster Farmers (SRO)	1%
Ocean Prawn Trawl Fishery	1%
Northern Prawn Fishery (NPF)	1%
South East Trawl Fisheries (SETF)	1%

Respondent Type- Commercial Fishing Organisations	Membership (n=142)
South Coast Estuarine Fishery	1%
Yabbies	1%
Mussels	1%
Offshore	1%
Pearls (P)	1%
Other	26%
Total	135%

NOTE: These tables present additional data (<3%) for the table on page 37 of this report representing S4.

S4. What fisheries sector do you belong to?

2008 Base: n=142 (Commercial Fishing Organisation) . *Multiple response, percentages do not add to 100%.

Appendix 4

Organisations Partially Funding R&D

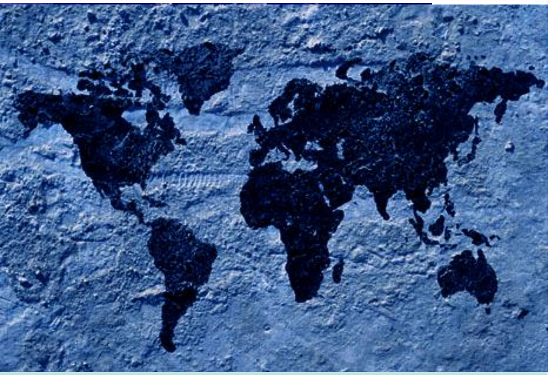
Organisations Partially Funding R&D

Name of Organisation Partially Funding R&D	Number of responses (n=17)
Aus Industry	4
Dept. Primary Industries & Fisheries Qld/NSW/Vic	3
SARDI (South Aust. Research Development Industry)	2
FRDC	2
NHT (Natural Heritage Trust)	1
CSIRO	1
Universities/Sydney/Canberra/Southern Cross/Qld/Tas	1
Federal/Commonwealth Government	1
CRC	1
Other	2

Note: Sample size less than 30 – treat with caution and as indicative only.

Q24. Can you please name this other organisation?

2008 Base: n=17 (Research partially funded by another organisation). *New question in 2008.*



What is she going to say?

What is he going to hear?

What does she have in mind?

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