



# 2023 FRDC Stakeholder Research

December 2023

Prepared by:



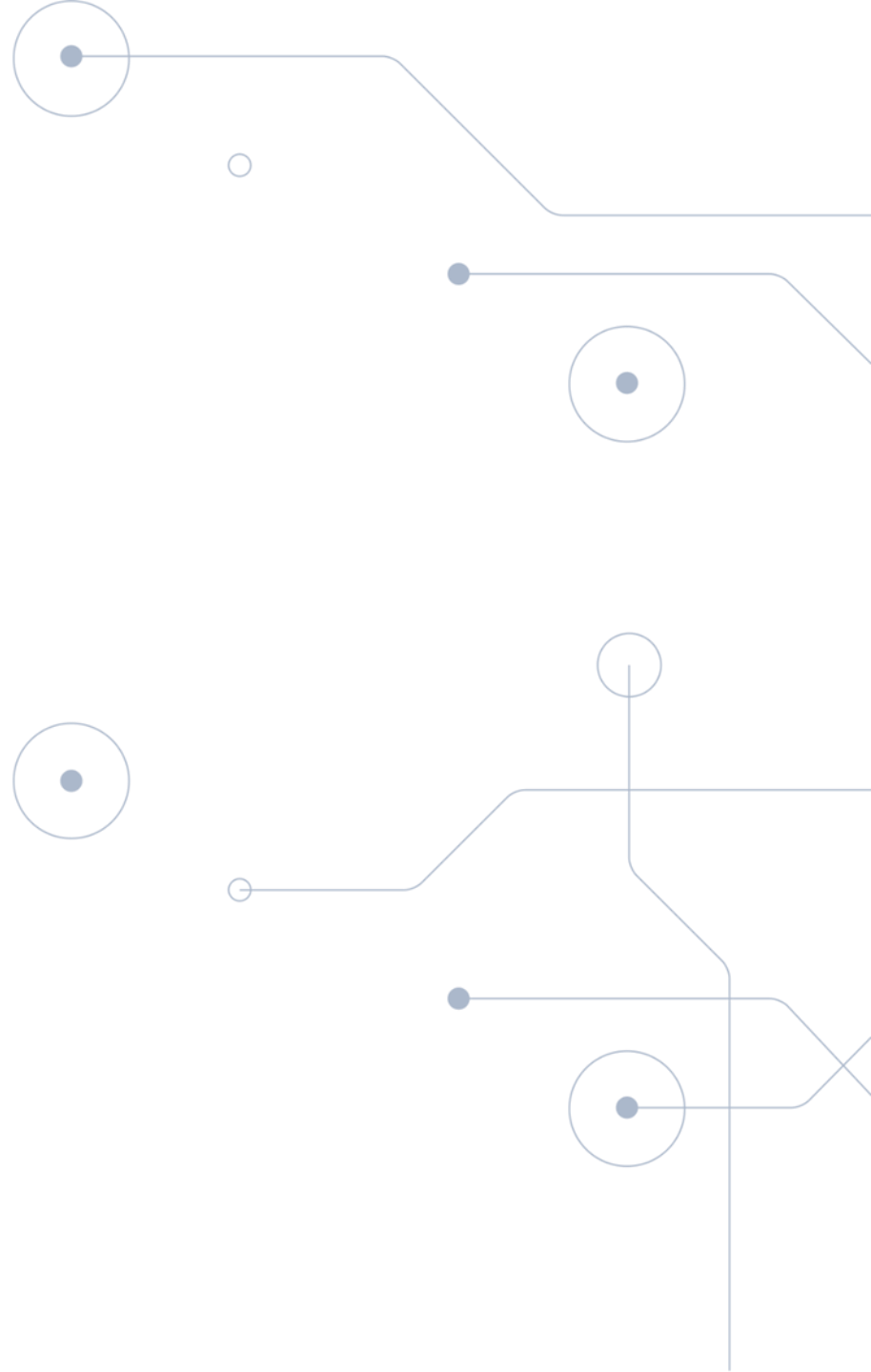
Prepared for:



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Context: the FRDC stakeholder survey



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

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

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

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

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

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

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

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



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

✓ FRDC’s organisational partners

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

✓ FRDC’s research community

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

✓ Fishing and Aquaculture

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

✓ The Australian community

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

These four audiences are the key focus of the FRDC Stakeholder Survey.

The FRDC stakeholder audience map



## *How often will this research be undertaken?*

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

The 2023 survey represents the second survey of stakeholders under the new Strategic Plan.

## *Where did the audience segments come from?*

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

## *What was the design for the research?*

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

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

## *Who designed the questions that were included in the survey?*

Development of the survey questionnaire was a co-design process involving FRDC, FRDC's Human Dimensions coordinating program (HDR) and Intuitive Solutions.

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

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

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

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

While in most audience segments respondents were classified into a single segment, for the fishing and aquaculture audience segment there was some cross-over – for example, in a small number of cases commercial fishers reported also being involved in aquaculture (n = 33 self-reported being involved in both commercial wild catch and aquaculture), some indigenous fishers also self-identified as commercial fishers, etc.

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

## *What is the Wild Catch and Aquaculture cohort?*

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

## *Were the survey results weighted?*

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

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

## *The survey accumulated a significant volume of feedback*

Again in 2023, the Stakeholder Survey collected a large volume of feedback from the included stakeholder groups. It was not possible to present every result by every audience segment and sub-group within this report. The results presented in this report are then a selective representation of the main result, predominantly for the larger stakeholder audiences.

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

## *What results are presented in the report?*

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

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

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



## Headline results








Indicator (as per Monitoring and Evaluation Framework)		Survey measure	Target	2023 Stakeholder Survey Results		
				Wild Catch and Aquaculture	Partners	Research Community
KPI 1	Stakeholders report that they value FRDC services highly	Proportion of stakeholders that are “satisfied” or “very satisfied” with FRDC services <i>(Q11 - does not include “Don’t use” or “Not aware” answers)</i>	70%	53% 2022: 55%	71% 73%	63% 58%
KPI 2	Stakeholders report that they value FRDC highly	Proportion of stakeholders that are “satisfied” or “very satisfied” with FRDC <i>(Q24)</i>	70%	41% 2022: 37%	58% 55%	58% 56%
KPI 3	Stakeholders report that they value FRDC extension and adoption	Proportion of stakeholders that have gained new knowledge or info from extension and adoption programs, and intend to (or have) made changes in existing practices by adopting outcomes <i>(Q13 – of those who have participated in R&amp;D events in the last 12 months, reported at least one active or passive outcome)</i>	50%	91% 2022: 86%	94% 96%	83% 79%
KPI 4	Of levy payers who participate in RDC supported extension and adoption programs: -the majority (over half) intend to make or have made changes to existing practices by adopting the outcomes of R&D (2.1 from Guidelines for SFAs KPIs)	Impactful proportion of stakeholders embracing/adopting R&D <i>(Q25 – of those who have participated in R&amp;D events in the last 12 months, reported to have made changes, have plans to, or intend to)</i>	50%	70% 2022: 66%	77% 83%	72% 76%
KPI 5	Transparent communication to stakeholders (including government) on the impacts and benefits of the RD&E (and marketing) activities (5.3 from Guidelines for SFAs KPIs)	Proportion of stakeholders who “agree” or “strongly agree” that FRDC is transparent in how it communicated the impacts of R&D it has supported <i>(Q23)</i>	No target	55% 2022: 47%	74% 61%	67% 62%


# Stakeholder Snapshot: Wild Catch and Aquaculture

Sample size: n = 221



## Key metrics

	41%	% satisfied that financial contributions to FRDC are being invested wisely and benefit the fishing and aquaculture sectors and the Aus community
	55%	% agree that FRDC is transparent in how it communicates the impacts of R&D it has supported
	42%	Intend to or have made changes to practices because of outcomes from FRDC info, services or R&D projects over the last 3 years

## Industry sentiment

	+21	NETT Sentiment of the future of Aus fishing / aquaculture industry over the next 12 months (scale of -100 to +100)
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## What FRDC does directly

	96%	% who recall at least one FRDC responsibility and role (when prompted with a list)
	32%	% who recall all three FRDC responsibilities and roles (when prompted with a list)

## FRDC mechanisms and outcomes

Interaction with FRDC mechanism	Did this	Reported an outcome *
Used at least one FRDC service	46%	88%
Involved in at least one activity	27%	84%
Participated in at least one R&D event	38%	91%
Interacted with the Extension Officers	28%	74%
Looked at FRDC social media	35%	79%

## Statements about FRDC

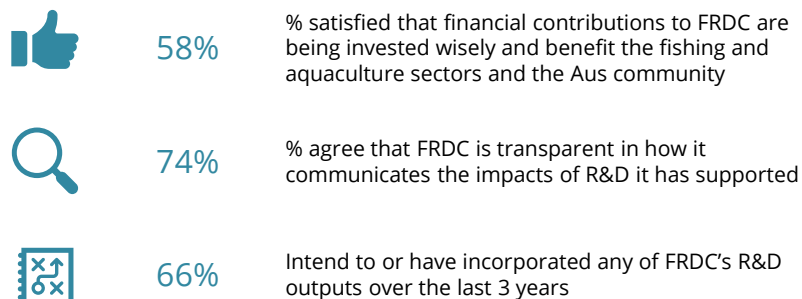
	% agree	
FRDC places a strong emphasis on fishing and aquaculture sustainability	78%	
FRDC places a strong emphasis on addressing the environmental issues facing fishing and aquaculture	71%	
You/your organisation value(s) the services offered by FRDC	63%	
FRDC's engagement with you/your organisation is appropriate	61%	
FRDC places an emphasis on diversity and inclusion for fishing and aquaculture	58%	
FRDC places a strong emphasis on the development of people	51%	

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

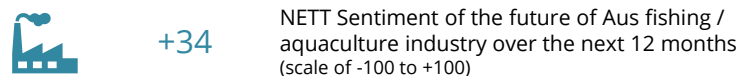
# Stakeholder Snapshot: Partners

Sample size: n = 125

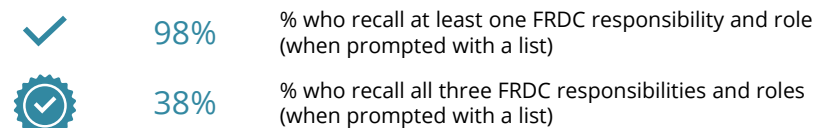
## Key metrics



## Industry sentiment









## What FRDC does directly



## FRDC mechanisms and outcomes

Interaction with FRDC mechanism	Did this	Reported an outcome *
Used at least one FRDC service	71%	97%
Involved in at least one activity	42%	87%
Participated in at least one R&D event	67%	94%
Interacted with the Extension Officers	44%	84%
Looked at FRDC social media	46%	81%

## Statements about FRDC

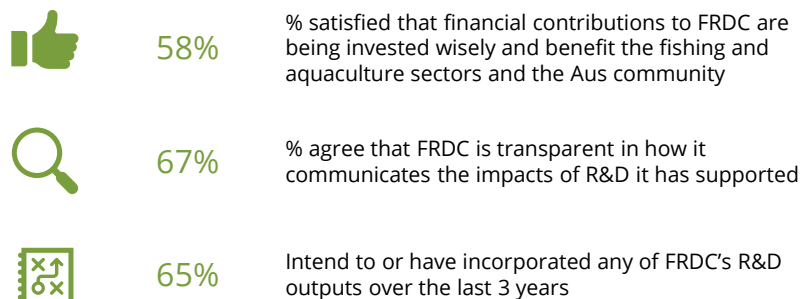
	% agree	
FRDC places a strong emphasis on fishing and aquaculture sustainability	87%	
You/your organisation value(s) the services offered by FRDC	84%	
FRDC's engagement with you/your organisation is appropriate	78%	
FRDC places a strong emphasis on the development of people	76%	
FRDC places an emphasis on diversity and inclusion for fishing and aquaculture	73%	
FRDC places a strong emphasis on addressing the environmental issues facing fishing and aquaculture	70%	

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

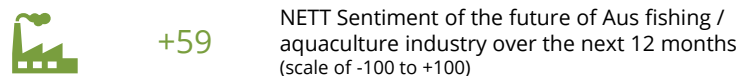
# Stakeholder Snapshot: Research Community

Sample size: n = 80

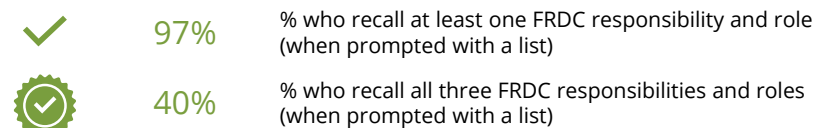
## Key metrics



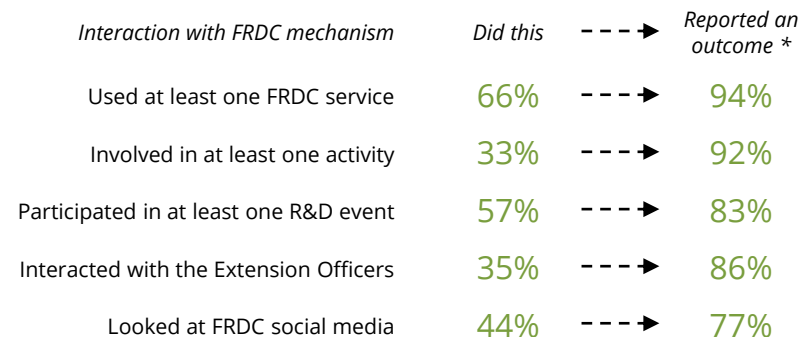
## Industry sentiment



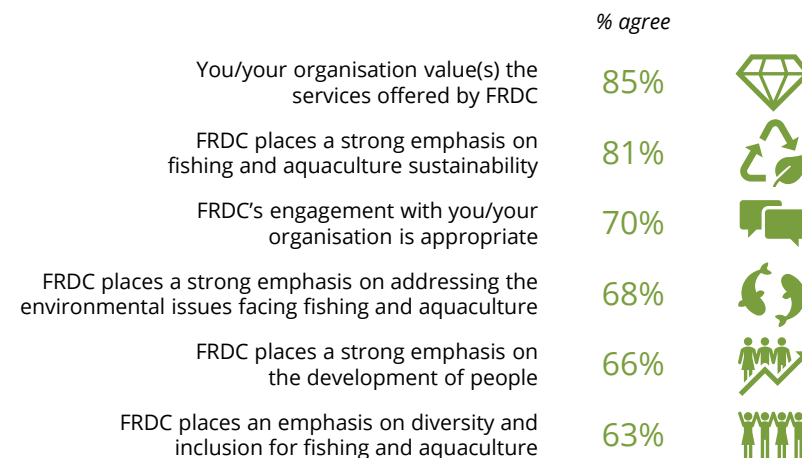
## What FRDC does directly



## FRDC mechanisms and outcomes



## Statements about FRDC



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



## Observations & insights



A summary of some of the key insights from the 2023 FRDC Stakeholder Survey now follow.

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

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

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

## **Context**

The Stakeholder Survey underwent a significant redesign for the 2022 survey. The 2023 survey was however largely consistent with the 2022 survey.

The survey data collection was undertaken across November and early December 2023, a period where the industry was still emerging from the disruption as a result of COVID-19, continuing (but improving) trade restrictions, continued high input and processing costs and a volatile global market. The domestic market continues to be impacted by cost-of-living pressures and high levels of inflation making trading and operating conditions challenging.

## **Stakeholder's outlook**

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

- ✓ More stakeholders indicated they were more positive than negative about the future.
- ✓ NETT sentiment (i.e. % positive – % negative) of +21 (Wild Catch and Aquaculture, down 4 points from 2022), +34 (Partners, down 16 points) and +59 (Research Community stakeholders, up 4 points). While the NETT sentiment scores remain optimistic with most stakeholders reporting a positive outlook for the immediate future, two of the groups show a decline since the previous survey indicating the pressures described above are dampening stakeholders' outlook.

Despite the challenging conditions, the majority of stakeholders report a positive outlook for the immediate future. That said, the pressures described above remain and are likely to be dampening stakeholders' outlook.



*NETT Sentiment  
(refer page 21)*

+21	Wild Catch and Aquaculture
+34	Partners
+59	Research Community

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

As noted in 2022, one of the challenges facing most RDCs is in ensuring there is a clear understanding of the role and responsibilities of the RDC. For FRDC, this is particularly amplified as a result of the wide remit of responsibilities and the varied stakeholder audiences it supports and manages.

The areas of responsibility measured in the 2023 survey changed from those presented in 2022, so a direct comparison of results year-on-year is not possible.

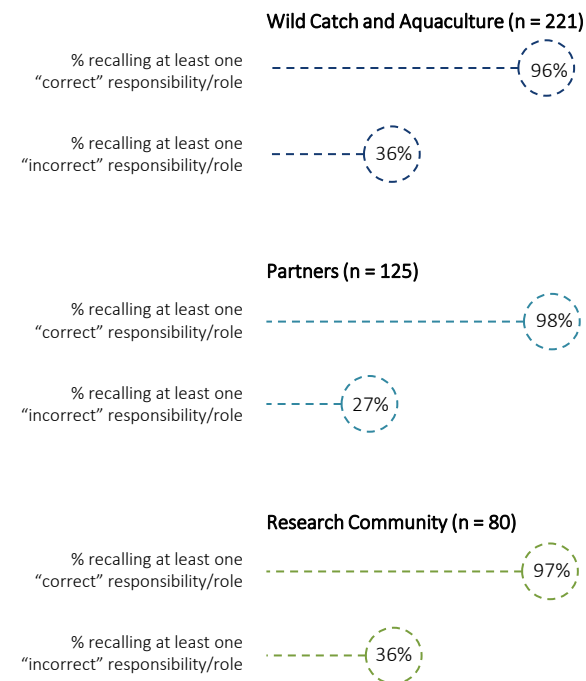
The results from the 2023 survey underscore the challenge for FRDC. For example, among Wild Catch and Aquaculture stakeholders, most (96%) correctly identified at least one of the actual responsibilities, but around one in three (36%) also identified a responsibility outside of FRDC's remit. Of note is that 23% reported political lobbying was an FRDC role.

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

Analysis of the 2023 survey data was unable to quantify this impact, but some comments provided in the survey link these incorrect assumptions of FRDC's responsibilities to dissatisfaction.

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

## *What does FRDC have responsibility for or play a role in? (6 roles provided, refer page 23)*



## Challenges with Wild Catch and Aquaculture stakeholders

As noted in 2022, results for the Wild Catch and Aquaculture stakeholders are lower than the other two stakeholder audiences (Partners and Research Community). As shown opposite, the proportion of stakeholders rating very satisfied or satisfied was high among Partners (58%, up 3% from 2022) and Research Community stakeholders (58%, up 2 points), but lower among Wild Catch and Aquaculture stakeholders (41%, up 5 points). Among this cohort, we note that:

- Slightly fewer than one in ten (9%) reported being very satisfied, with a further 32% satisfied
- A large proportion (41%) were ambivalent rating neutral, whilst
- 18% reported being dissatisfied (12% dissatisfied and 6% very dissatisfied)

There has been a small but important strengthening of satisfaction year-on-year. It is likely that change will take time and should be considered the 'long game' rather than expect strong uplifts in the short-term.

While stronger satisfaction results are welcome, it is likely that there is a stronger opportunity to shift perceptions of this large sub-group as they rated neutral and not dissatisfied. However, getting to this will be a longer-term objective and require consistent attention, focus and investment. They should be the priority for FRDC to 'move the satisfaction needle'.

The results again identify a large sub-group who are ambivalent (41%). Experience suggests that this may be an outcome of lower understanding and knowledge of what FRDC does and provides, a lower level of engagement or lower uptake of R&D outcomes to improve business profitability.

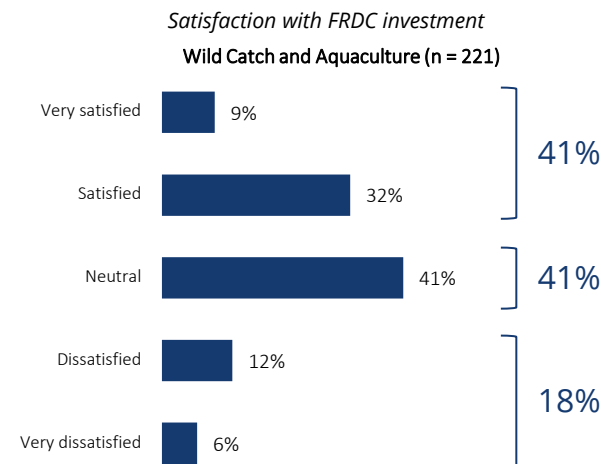
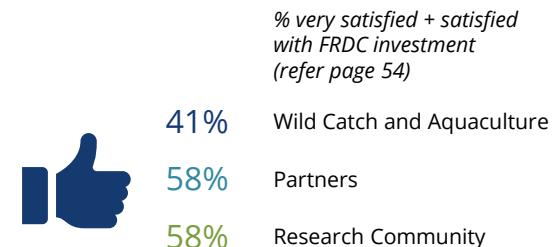
We again note that our analysis of this 'neutral' Wild Catch and Aquaculture sub-group does illustrate that, in general:

- They are less aware of the services FRDC makes available;
- Are less likely to use the services and resources FRDC offers;
- Are somewhat less likely to consumer social media content;
- Are, at this point, unlikely to have engaged with the EON; and arguably as a result
- Report being less satisfied with FRDC.

As noted in the 2022 report, while the 'long game' (that is achieving continual improvement over time in key measures) should remain a focus for FRDC, consideration about anchoring or overtly linking FRDC's services and resources to the specific challenges these stakeholders face today warrants consideration.

Doing 'more of the same' might not achieve the step change that is sought. It may require a curation of the benefits to 'talk to' the issues these businesses are currently facing.

That said, there remains ample 'upside' opportunities for FRDC to continue to strengthen and deepen its engagement across all stakeholder audiences.





## *Some encouraging signals for the reach and impact of the EON. . . .*

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

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

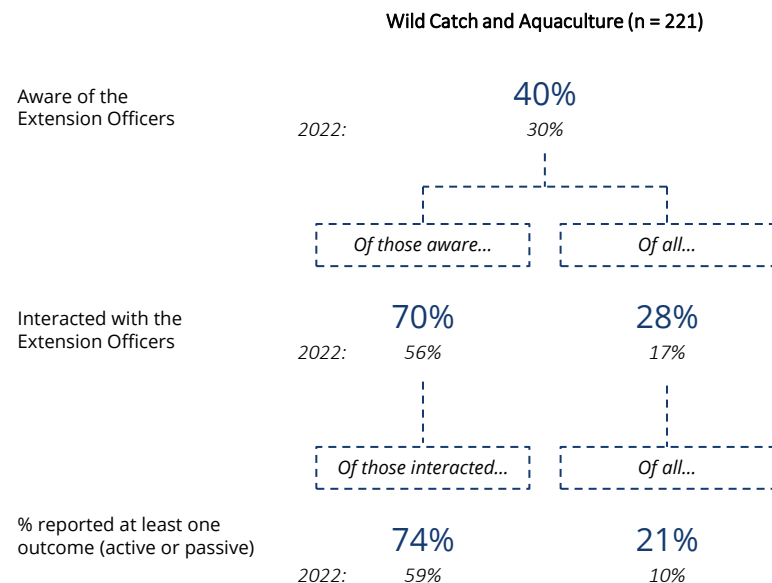
In addition, the Extension Officer Network (EON) was established to support each jurisdiction in Australia and to engage with stakeholders and learn more about their needs, connect stakeholders with R&D outputs, and make connections where needs, priorities, stakeholders and activities overlap.

The initial results from the 2022 survey were encouraging but modest in terms of the awareness, level of interaction and impact from this new investment from FRDC. Based on the feedback in the 2023 survey, we note that:

- ✓ More F&A stakeholders reported that they were aware of the EON (40% compared to 30% in 2022). Clearly efforts to promote the EON have gained some traction with a greater level of visibility of these regionally based assets.
- ✓ Correspondingly, the proportion of F&A stakeholders who had an interaction with the EON over the last 12 months saw a strong uplift (28% compared to 17% in 2022).
- ✓ There are signals the interactions are creating a positive impact with 21% reporting some form of impact as a result of the interactions (up from 10% in 2022).

Overall, the results are encouraging and suggest some clear gains have been achieved by the EON over the last 12 months. That said, there remains considerable further upside (increase awareness from the current 40% and ramp up the interactions).

In the mid-term, the challenge will be to sustain and build this value as more stakeholders become aware and have the opportunity to interact with the extension officers.



***A shifting focus to the uptake of FRDC managed R&D and available tools & resources, and an increasing lens around the impact of these investments. . . .***

There has been a material shift across most RDCs from measuring inputs, activities and events to measures of the uptake of R&D outcomes, use of the available resources and tools and a focus on understanding the impact of the RDC investments within and across key stakeholder cohorts.

While a sensible reset, there are significant difficulties in establishing a causal relationship between these things and practice change on boats or on farms. It is important to note that:

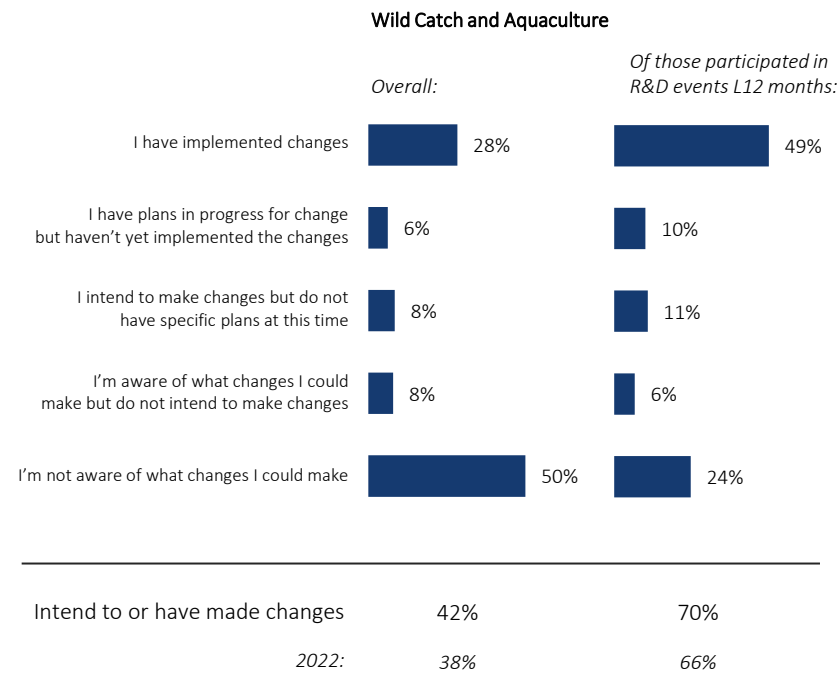
- F&A stakeholders source and use a variety of information and advice sources to make decisions.
- Changing existing practices from often long-term successful businesses not only requires a compelling business case but the environment to allow for and facilitate practice change.
- Practice change decisions are often made over an extended period and are likely to have been impacted by different forces and factors over this time.

Despite these challenges, the 2023 survey attempted to capture (at a very high level) signals that the FRDC efforts may be contributing to creating an environment where change would be considered or taken. From the 2023 results, we see:

- Just over four in ten (42%) reported having made a change or intending to make a change as a result of outcomes from any of the FRDC information, services or R&D projects.
- This result is amplified when looking at those stakeholders who have participated in R&D events in the last 12 months (70%)
- Both results have seen a small uplift from the 2022 results (42% up from 38%, 70% up from 66%).

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

The detailed results from the 2023 FRDC Stakeholder Survey now follow.



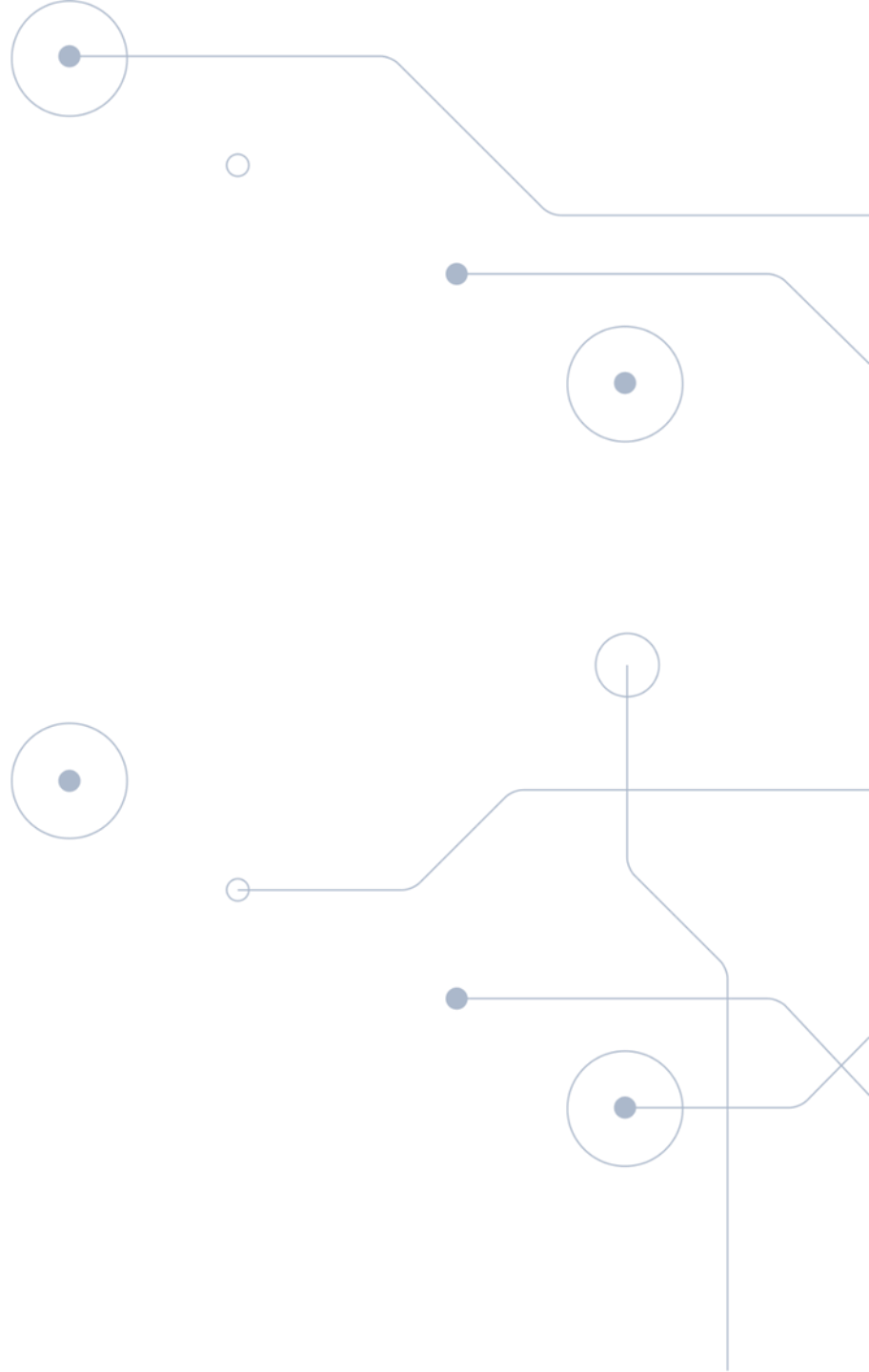


## Detailed results

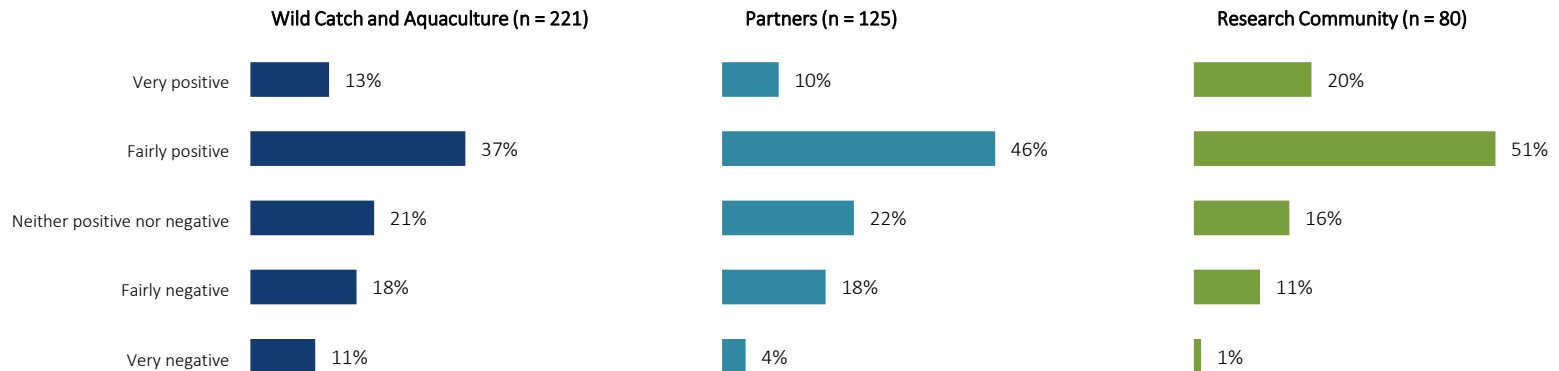




Stakeholder sentiment



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



Total positive	50%	56%	71%
Total negative	29%	22%	12%
NETT Sentiment*	+21	+34	+59
2022:	+25	+50	+55

Results across Fishing and Aquaculture sub-groups:

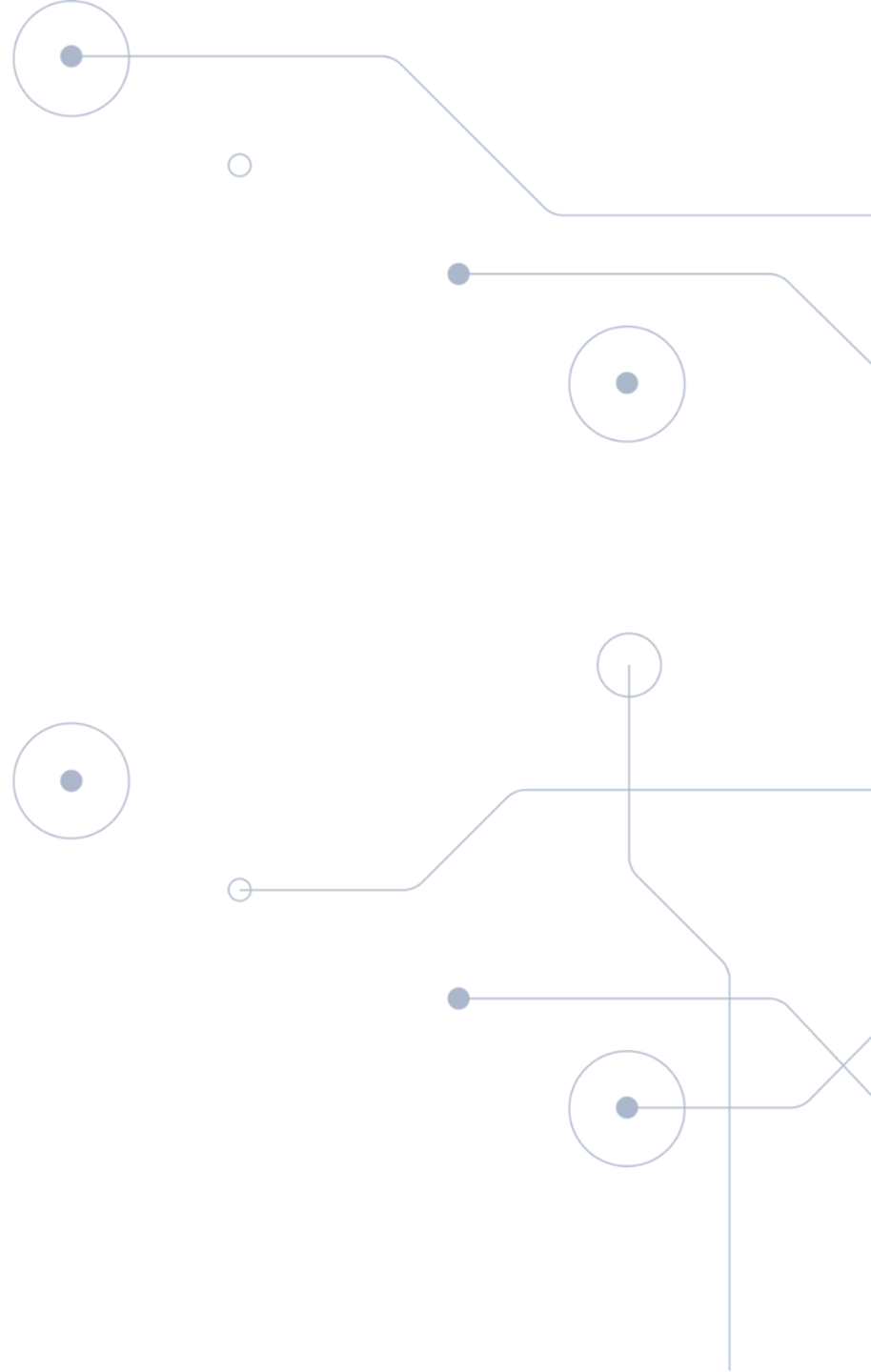
The table below provides results for the five different Fishing and Aquaculture industry sub-groups. Note the results above (Wild Catch and Aquaculture) are a weighted subset of the Fishing and Aquaculture audience segment (those who self-identify as being involved in commercial wild catch and/or aquaculture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

Sub-groups of Fishing & Aquaculture	Aquaculture (n = 103)	Commercial Wild Catch (n = 151)	Supply Chain (n = 102)	Indigenous (n = 23)	Recreational Fishers (n = 39)
Total positive	64%	36%	50%	48%	67%
Total negative	16%	42%	33%	30%	10%
NETT Sentiment	+48	-6	+17	+18	+57

\*NETT Sentiment is the difference between the proportion of positive sentiment responses and negative sentiment responses.  
 NETT Sentiment scores are measured with a single question and reported with a number from -100 to +100, where a higher score is desirable.



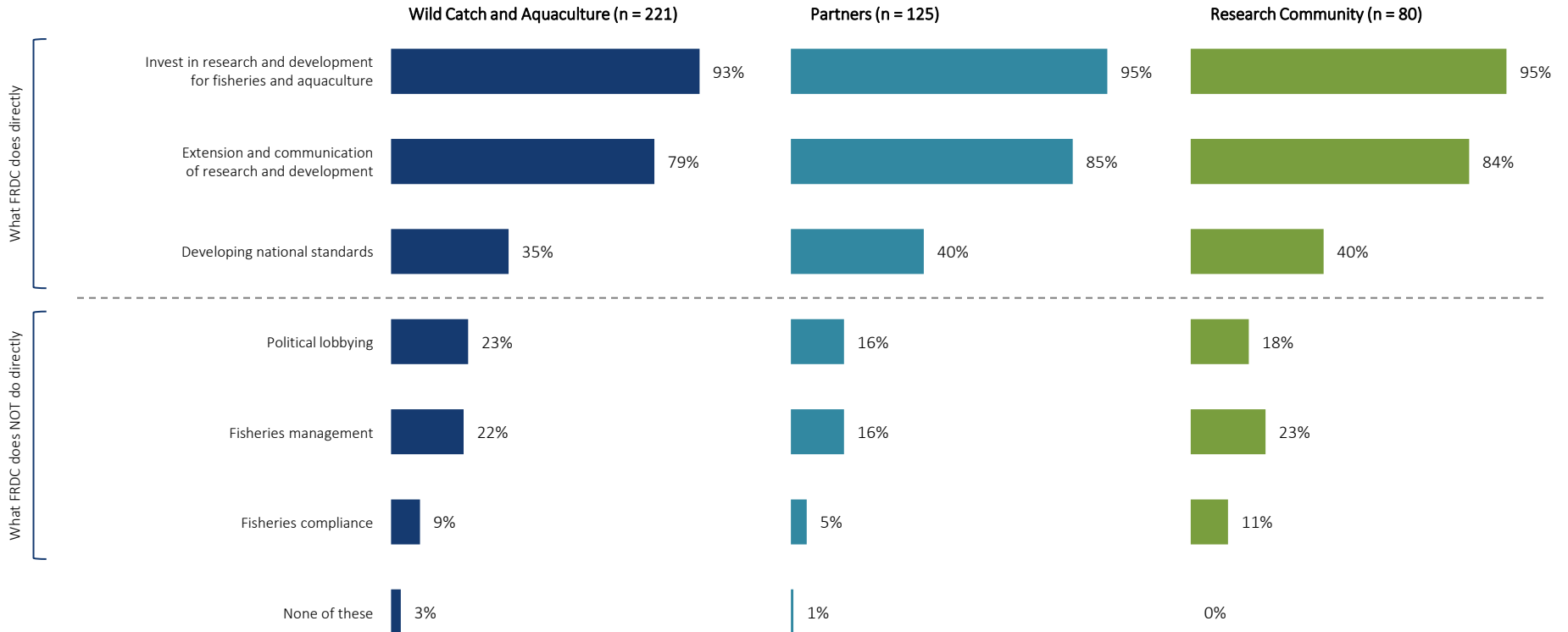
## Stakeholder understanding of FRDC roles and responsibilities



# FRDC's role and responsibilities

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

Asked to all respondents.



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

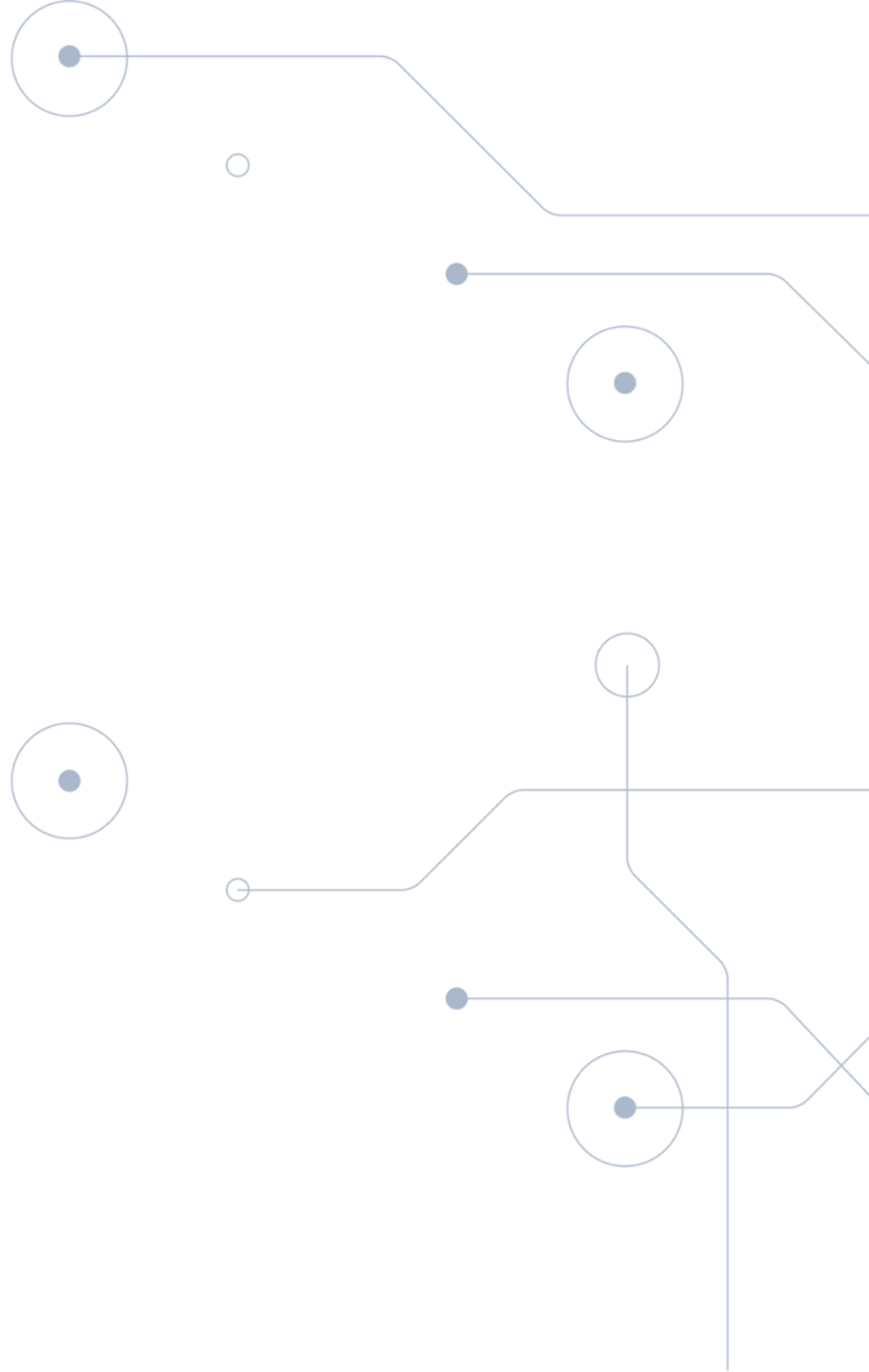
	Wild Catch and Aquaculture (n = 221)	Partners (n = 125)	Research Community (n = 80)
Correct responsibilities / roles of FRDC recalled			
None recalled	4%	2%	3%
One recalled	16%	14%	16%
Two recalled	48%	46%	41%
All three recalled	32%	38%	40%
% recalling at least one "correct" responsibility/role	96%	98%	97%
2022:*	93%	98%	100%
% recalling at least one "incorrect" responsibility/role	36%	27%	36%
2022:*	61%	52%	51%
% recalling all three "correct" and zero "incorrect" responsibilities/roles	17%	24%	20%
2022:*	5%	11%	5%

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



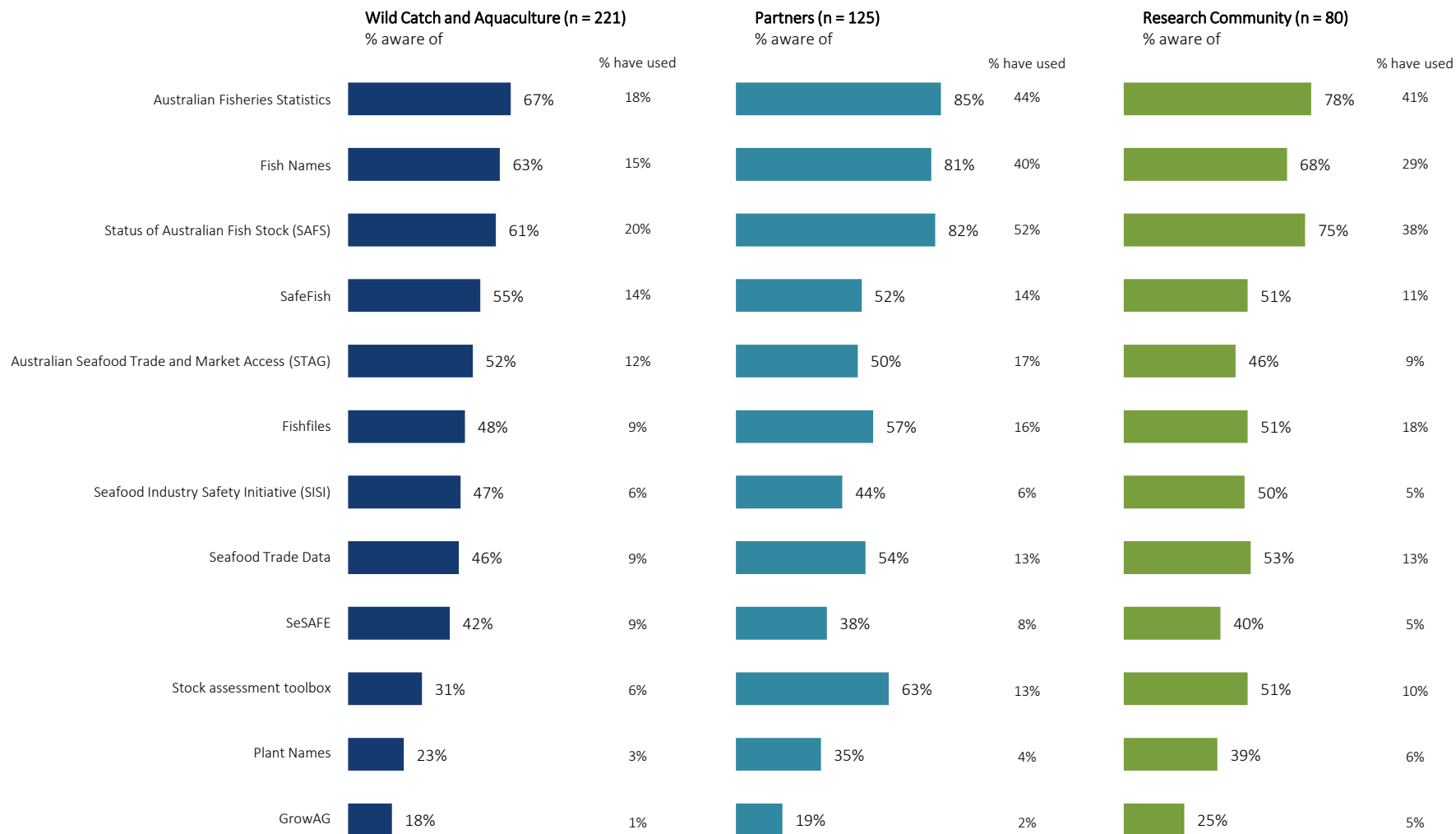


Stakeholder experience with:  
FRDC services, activities & extension



# Awareness and/or use of FRDC services

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

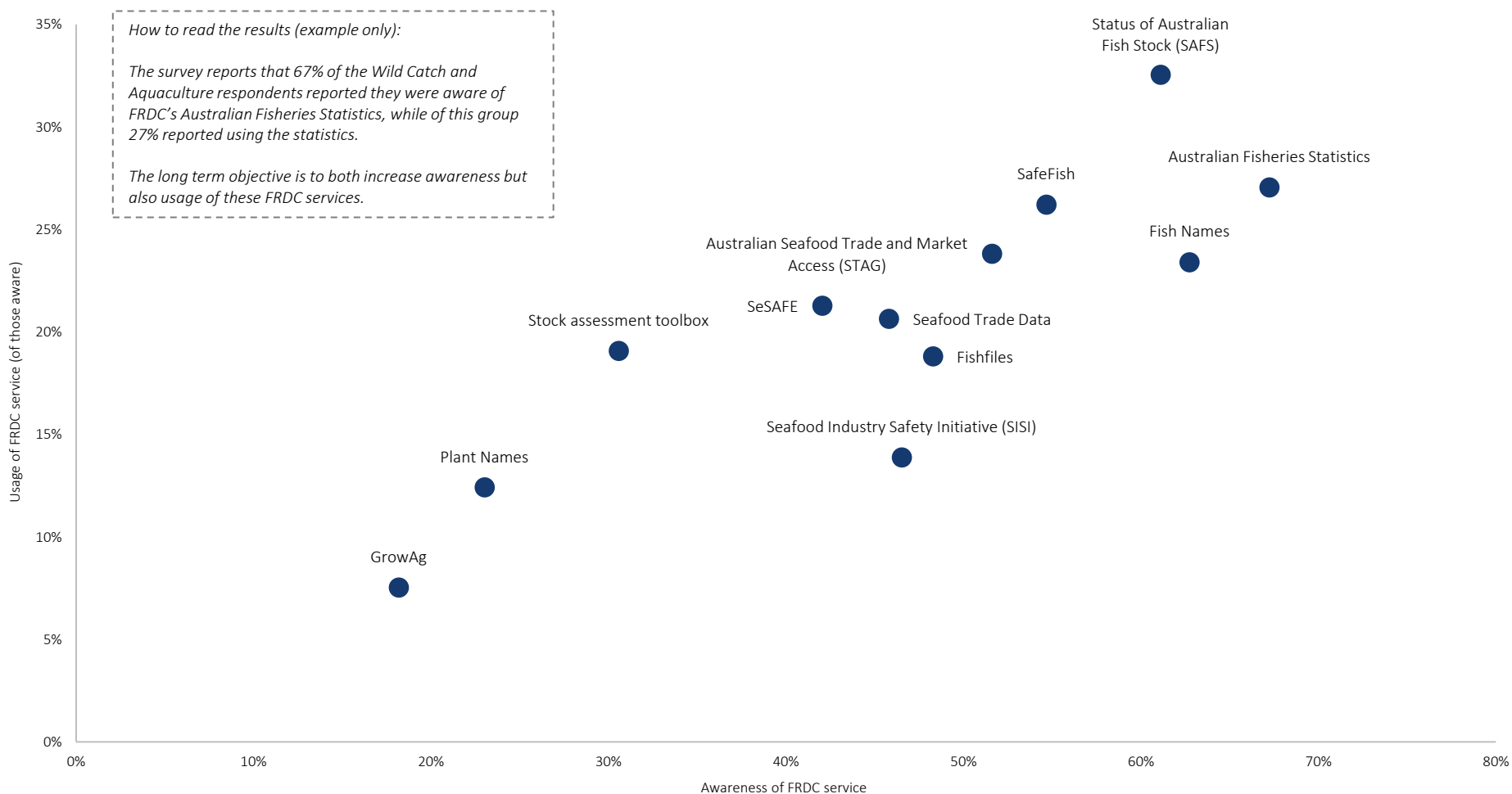


Over the past 12 months, have you used or been aware of any of the following services? Please select all that apply.  
 Asked to all respondents.

	Wild Catch and Aquaculture (n = 221)	Partners (n = 125)	Research Community (n = 80)
None aware	10%	7%	6%
One to three aware	23%	11%	16%
Four to six aware	27%	31%	30%
Seven to eleven aware	35%	4%	39%
All twelve aware	5%	9%	9%
Average # of FRDC services aware of	5.5 out of 12	6.6 out of 12	6.3 out of 12
2022:	5.5 out of 12	6.8 out of 12	7.1 out of 12

# Mapping awareness and use of FRDC services

Wild Catch and Aquaculture (n = 221) mapping of awareness of FRDC services (X-Axis) against the usage of FRDC services among those aware (Y-Axis).



# Reported outcomes from using FRDC services

The following question is asked to those who have used FRDC services over the past 12 months:

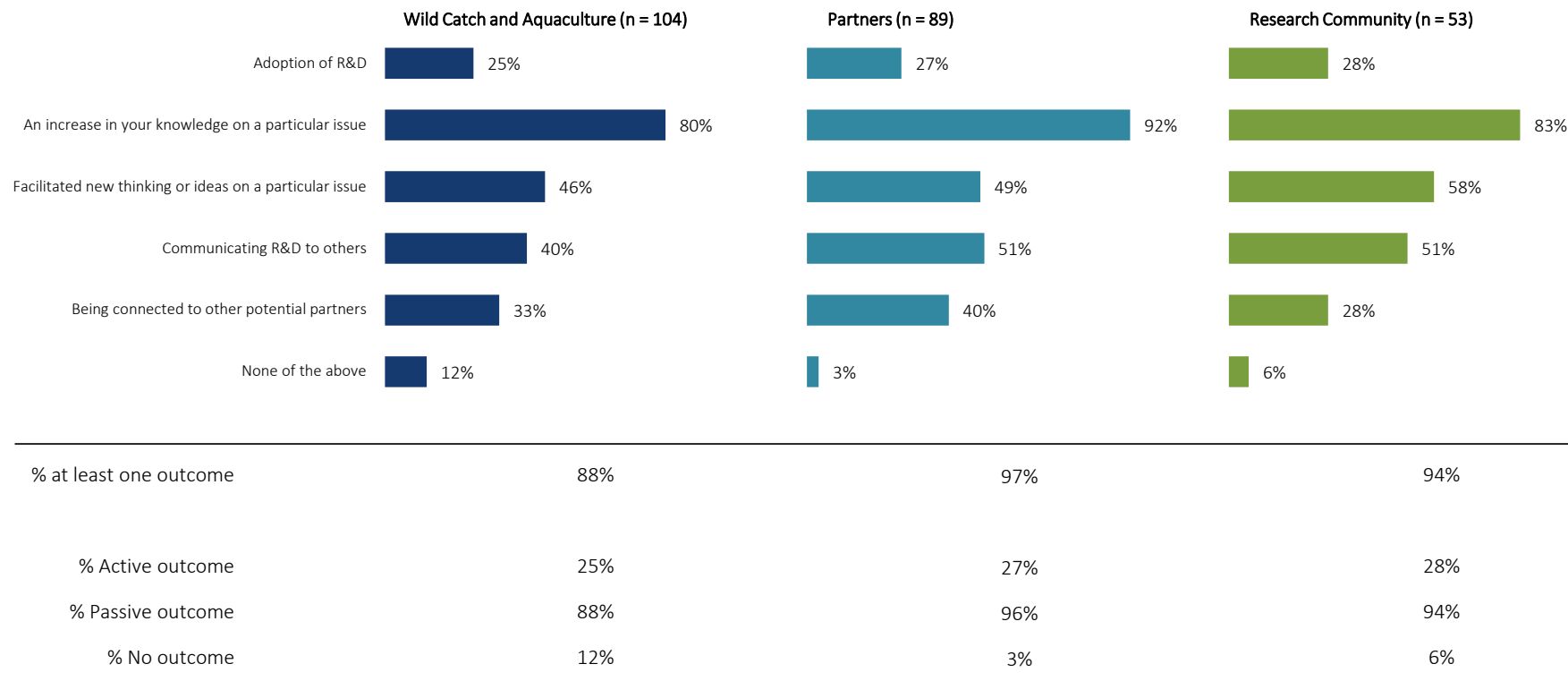
46%

71%

66%

Did your utilisation of these FRDC services lead to any of the following outcomes? Please select all that apply.

Asked to all respondents who have utilised FRDC services over the past 12 months.



# Usage and outcomes from FRDC services

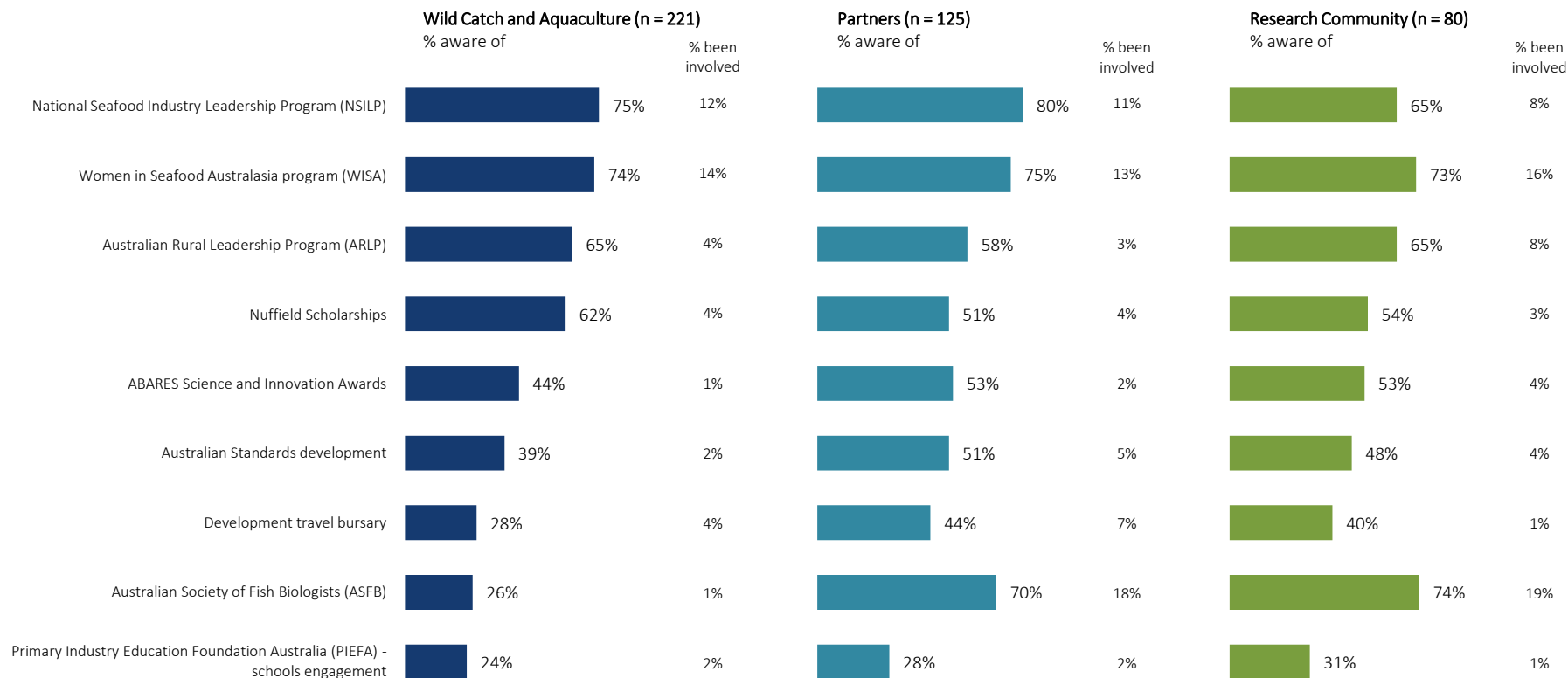
Usage and outcomes from FRDC services over the past 12 months  
 Asked to all respondents.

	Wild Catch and Aquaculture (n = 221)	Partners (n = 125)	Research Community (n = 80)
Used at least one FRDC service	<b>46%</b>	<b>71%</b>	<b>66%</b>
2022:	50%	78%	72%
<i>Of those who used...</i>			
% reported at least one outcome (active or passive)	<b>88%</b>	<b>97%</b>	<b>94%</b>
2022:	74%	89%	85%
<i>Of all respondents...</i>			
Used at least one FRDC service AND reported at least one outcome (active or passive)	<b>40%</b>	<b>69%</b>	<b>63%</b>
2022:	37%	69%	61%

Sub-groups of Fishing & Aquaculture	Aquaculture (n = 103)	Commercial Wild Catch (n = 151)	Supply Chain (n = 102)	Indigenous (n = 23)	Recreational Fishers (n = 39)
Used at least one FRDC service	42%	50%	57%	26%	62%
<i>Of those who used...</i>					
% reported at least one outcome (active or passive)	91%	83%	86%	100%	88%
<i>Of all respondents...</i>					
Used at least one FRDC service AND reported at least one outcome (active or passive)	38%	42%	49%	26%	54%

# Awareness and/or involvement in FRDC activities

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



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

	Wild Catch and Aquaculture (n = 221)	Partners (n = 125)	Research Community (n = 80)
Average # of FRDC activities aware of	4.4 out of 9	5.1 out of 9	5.0 out of 9
None aware	12%	9%	11%
One to two aware	13%	9%	14%
Three to four aware	25%	22%	16%
Five to eight aware	44%	46%	43%
All nine aware	7%	15%	16%

	Wild Catch and Aquaculture (n = 221)	Partners (n = 125)	Research Community (n = 80)
Average # of FRDC activities involved in	0.4 out of 9	0.6 out of 9	0.6 out of 9
No involvement	73%	58%	67%
One involved in	14%	30%	19%
Two involved in	9%	6%	4%
Three or more involved in	4%	5%	10%



# Reported outcomes from being involved in FRDC activities

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

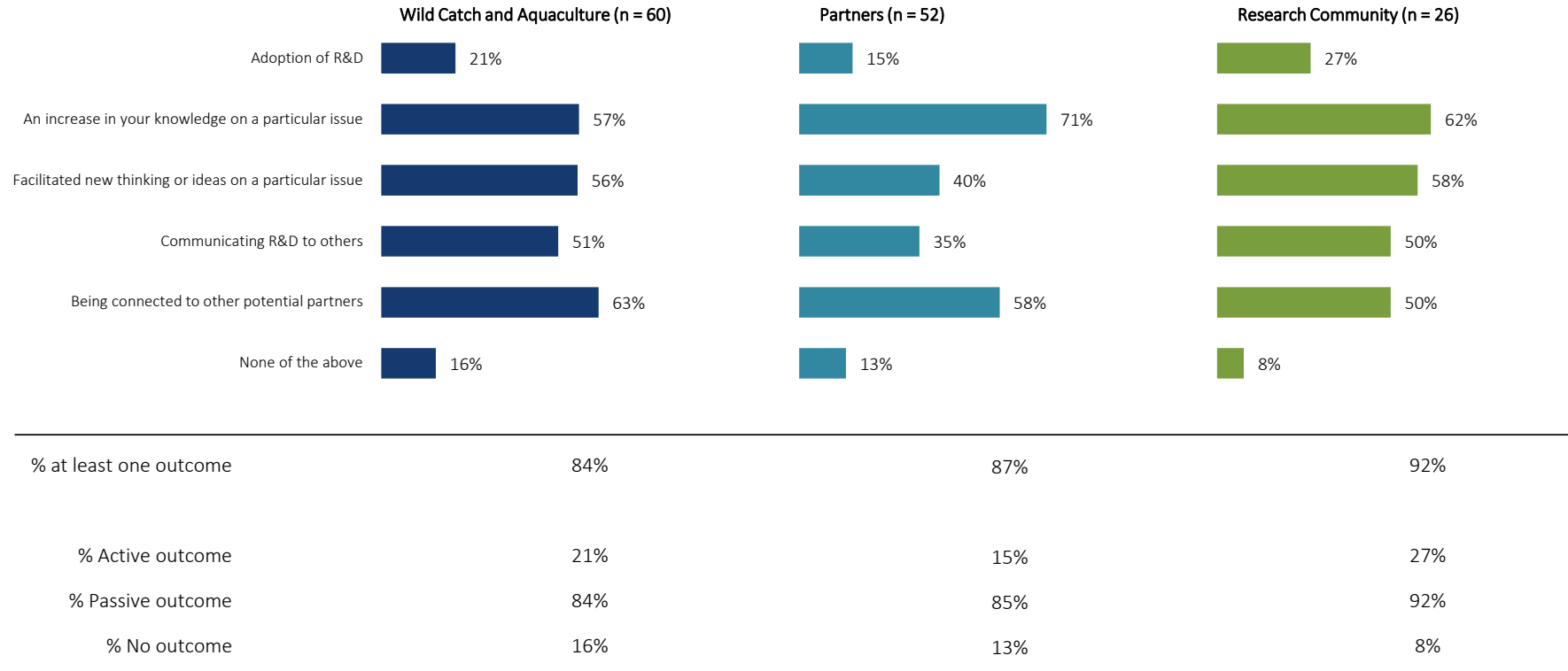
27%

42%

33%

Did your involvement in these Capability and Capacity Building activities lead to any of the following outcomes? Please select all that apply.

Asked to all respondents who have been involved in FRDC activities over the past 12 months.



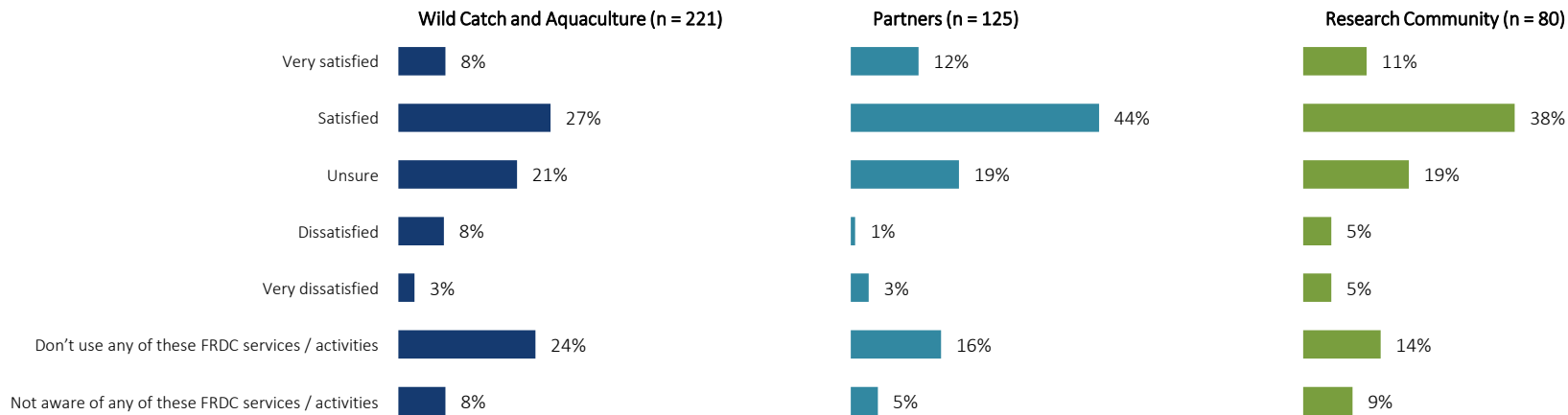
# Involvement and outcomes from FRDC activities

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

	Wild Catch and Aquaculture (n = 221)	Partners (n = 125)	Research Community (n = 80)
Involvement in at least one activity	27%	42%	33%
2022:	27%	46%	30%
<i>Of those who were involved...</i>			
% reported at least one outcome (active or passive)	84%	87%	92%
2022:	72%	93%	84%
<i>Of all respondents...</i>			
Involvement in at least one activity AND reported at least one outcome (active or passive)	23%	36%	30%
2022:	20%	43%	26%

Sub-groups of Fishing & Aquaculture	Aquaculture (n = 103)	Commercial Wild Catch (n = 151)	Supply Chain (n = 102)	Indigenous (n = 23)	Recreational Fishers (n = 39)
Involvement in at least one activity	27%	28%	22%	13%	13%
<i>Of those who were involved...</i>					
% reported at least one outcome (active or passive)	89%	81%	91%	67%	100%
<i>Of all respondents...</i>					
Involvement in at least one activity AND reported at least one outcome (active or passive)	24%	23%	20%	9%	13%

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



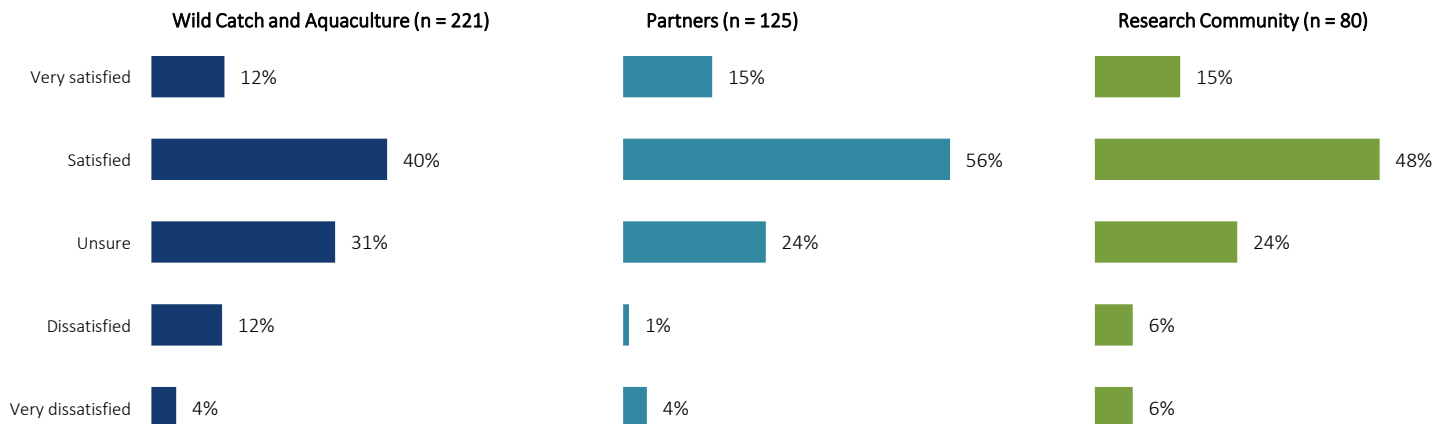
% very satisfied + satisfied	35%	56%	49%
<i>Of those who are aware of C&amp;CB activities...</i>			
% very satisfied + satisfied	40%	60%	51%
<i>Of those who have been involved in C&amp;CB activities...</i>			
% very satisfied + satisfied	70%	69%	69%

# Satisfaction with FRDC activities

KPI 1

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

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



**KPI 1** - % very satisfied + satisfied  
 (excluding don't use / not aware)

53%

71%

63%

Sub-groups of Fishing & Aquaculture

Aquaculture  
 (n = 103)

Commercial Wild Catch  
 (n = 151)

Supply Chain  
 (n = 102)

Indigenous  
 (n = 23)

Recreational Fishers  
 (n = 39)

**KPI 1** - % very satisfied + satisfied  
 (excluding don't use / not aware)

55%

52%

54%

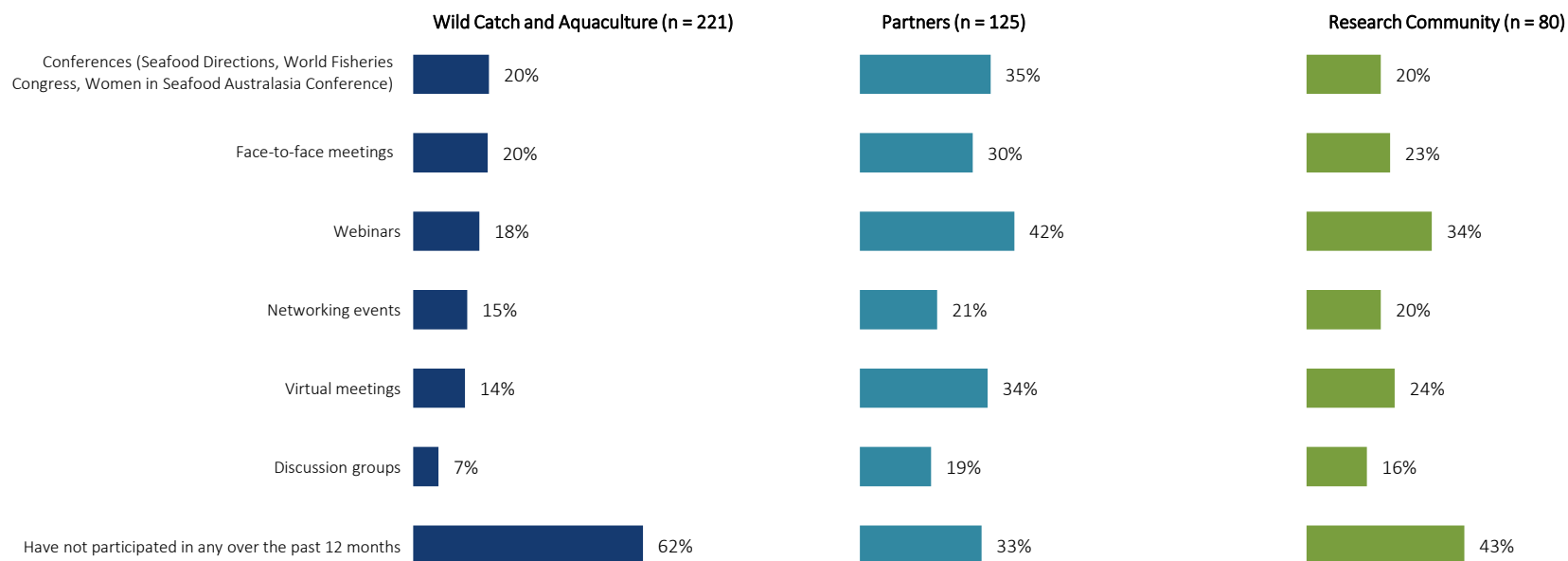
28%

48%

# Participation in FRDC R&D extension events

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

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



# Reported outcomes from participating in FRDC R&D extension events

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

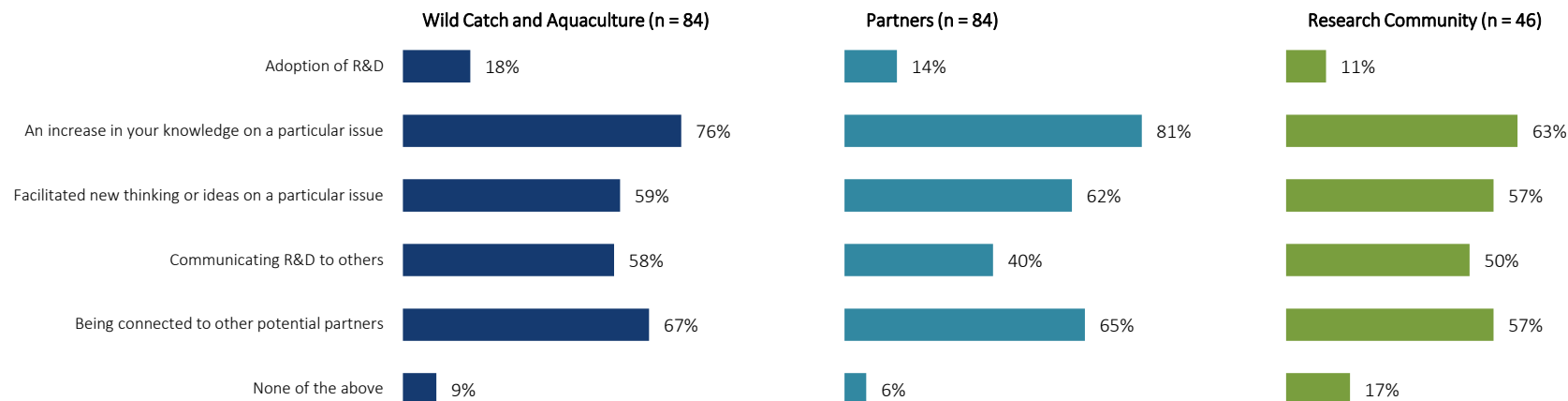
38%

67%

57%

Did your participation in these R&D events lead to any of the following outcomes? Please select all that apply.

Asked to all respondents who have participated in FRDC R&D events over the past 12 months.



% at least one outcome	91%	94%	83%
% Active outcome	18%	14%	11%
% Passive outcome	91%	93%	83%
% No outcome	9%	6%	17%

# Participation and outcomes from FRDC R&D extension events

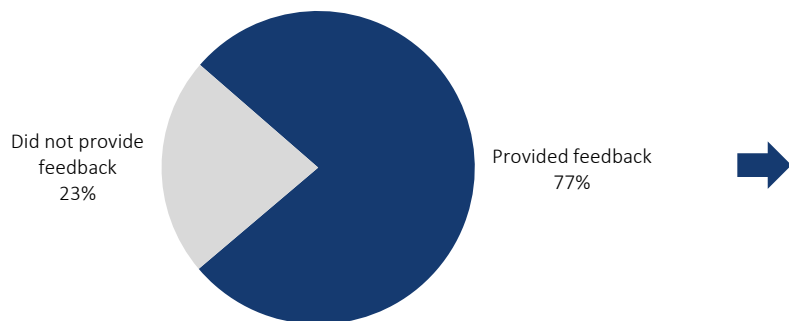
KPI 3

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

	Wild Catch and Aquaculture (n = 221)	Partners (n = 125)	Research Community (n = 80)
Participated in at least one R&D event	<b>38%</b>	<b>67%</b>	<b>57%</b>
2022:	33%	51%	40%
<i>Of those who participated...</i>			
<b>KPI 3</b> - % reported at least one outcome (active or passive)	<b>91%</b>	<b>94%</b>	<b>83%</b>
2022:	86%	96%	79%
<i>Of all respondents...</i>			
Participated in at least one R&D event AND reported at least one outcome (active or passive)	<b>35%</b>	<b>63%</b>	<b>48%</b>
2022:	28%	49%	32%

Sub-groups of Fishing & Aquaculture	Aquaculture (n = 103)	Commercial Wild Catch (n = 151)	Supply Chain (n = 102)	Indigenous (n = 23)	Recreational Fishers (n = 39)
Participated in at least one R&D event	38%	38%	34%	35%	23%
<i>Of those who participated...</i>					
<b>KPI 3</b> - % reported at least one outcome (active or passive)	92%	89%	91%	75%	67%
<i>Of all respondents...</i>					
Participated in at least one R&D event AND reported at least one outcome (active or passive)	35%	34%	31%	26%	15%

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



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

*Feedback grouped into several 'themes'*

22% - More awareness of the opportunities

15% - Relevant subjects

14% - Personal changes (my time/availability, my interest, etc.)

10% - No value in attending

5% - More contact about opportunities (invite me, follow-up emails, etc.)

4% - Nothing / N/A

3% - More opportunities closer to me (more local, regional, etc.)

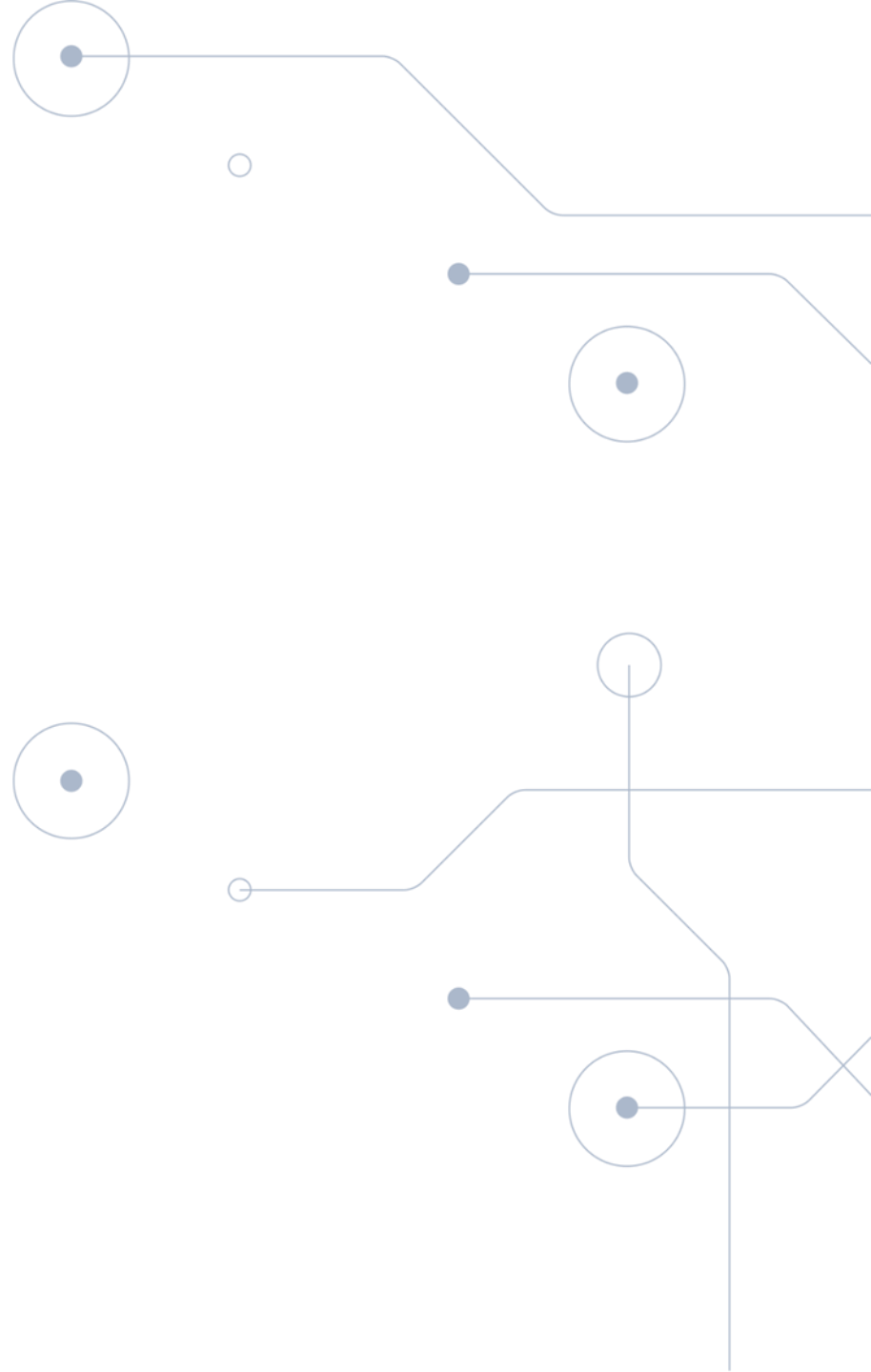
3% - More online opportunities

2% - Costs associated with attending





Stakeholder experience with:  
FRDC Extension Officer Network (EON)



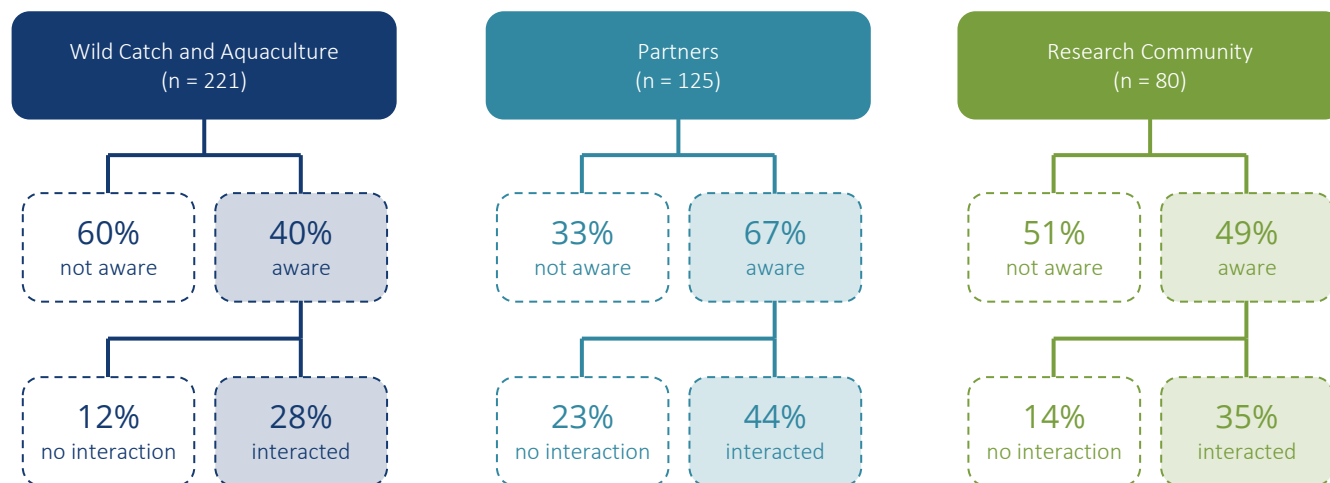
In mid 2022, FRDC made a strategic decision to employ regionally based Extension Officers across Australia.

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

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

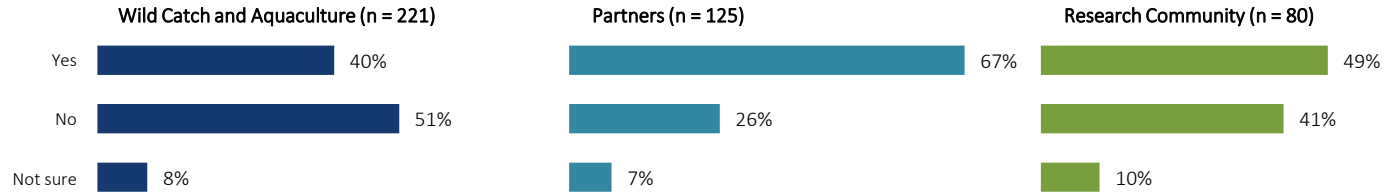
The 2023 FRDC Stakeholder Survey provides another measure of stakeholder's awareness of and engagement with these Extension Officers.

Awareness and interactions with FRDC Extension Officers



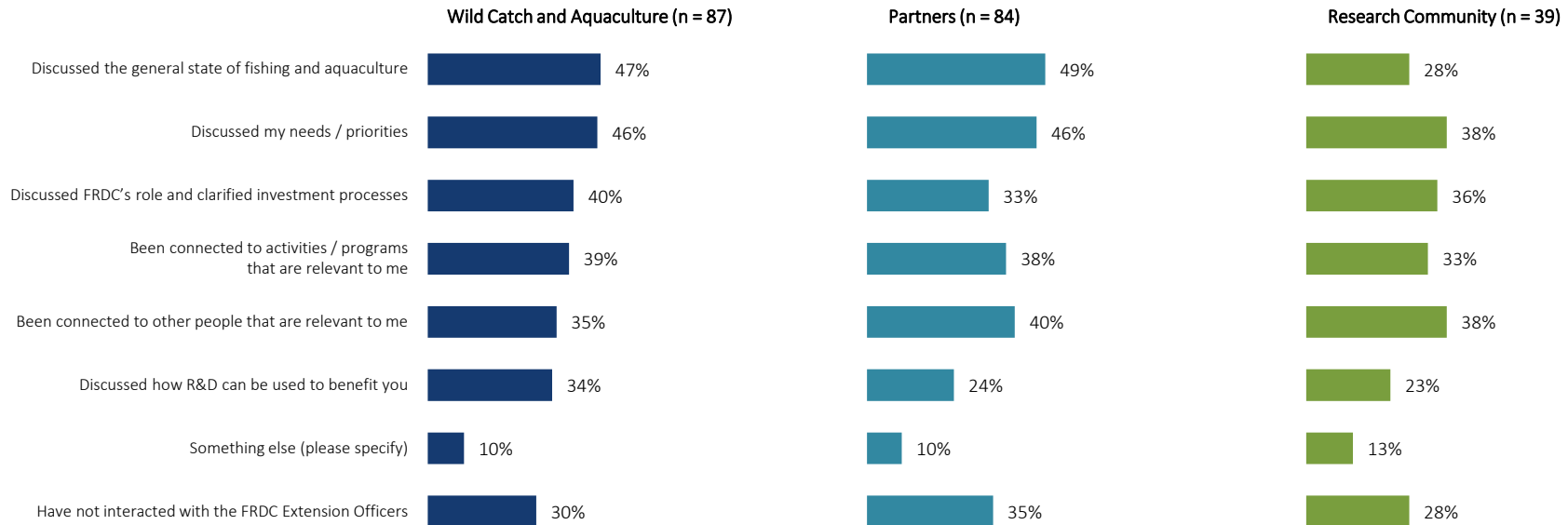
Are you aware of the FRDC Extension Officer Network?

Asked to all respondents.



Which of the following interactions have you had with any of the FRDC Extension Officers? Please select all that apply.

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



# Value of the FRDC Extension Officers

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

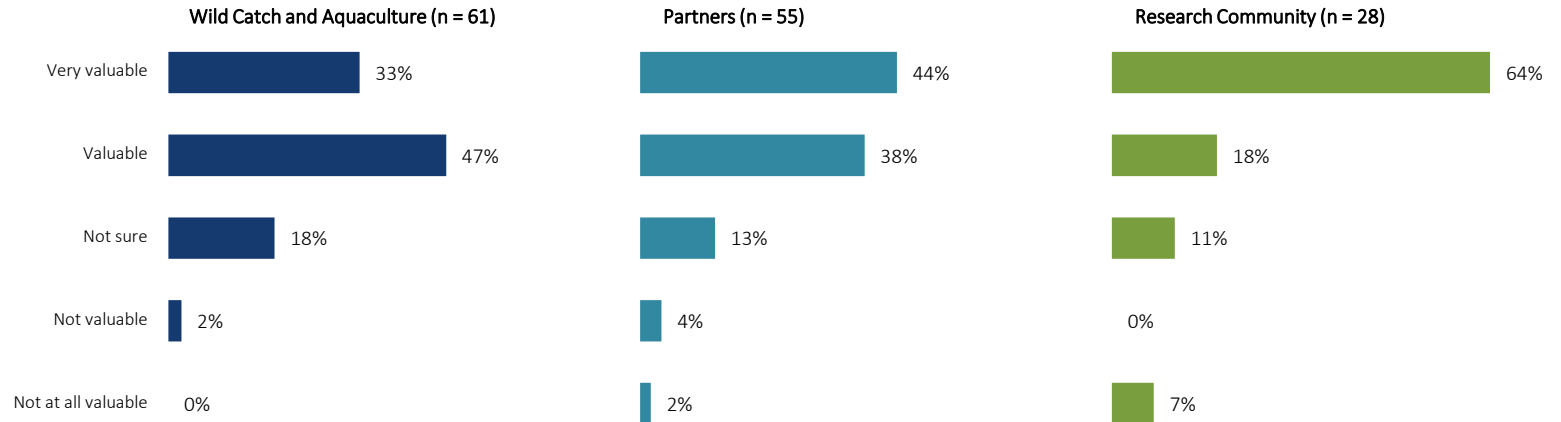
28%

44%

35%

Thinking about the interactions you've had, how valuable do you think Extension Officers are?

Asked to all respondents who have interacted with the FRDC Extension Officers.



% very valuable + valuable

80%

82%

82%

# Reported outcomes from interacting with the FRDC Extension Officers

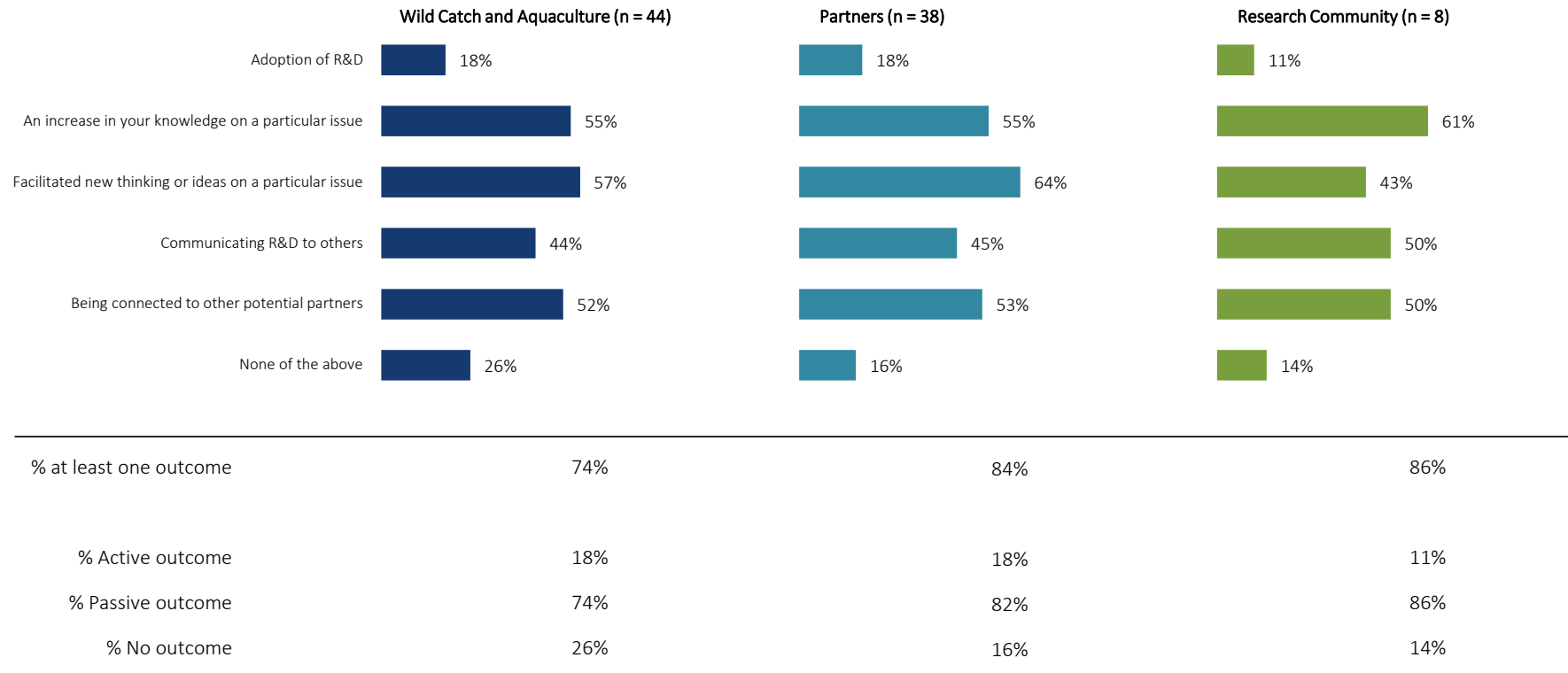
The following question is asked to those who have interacted with the FRDC Extension Officers:

28%

44%

35%

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



Active outcome: Adoption of R&D

Passive outcome: Increase in knowledge, Facilitated new thinking, Communicating to others, Being connected to others

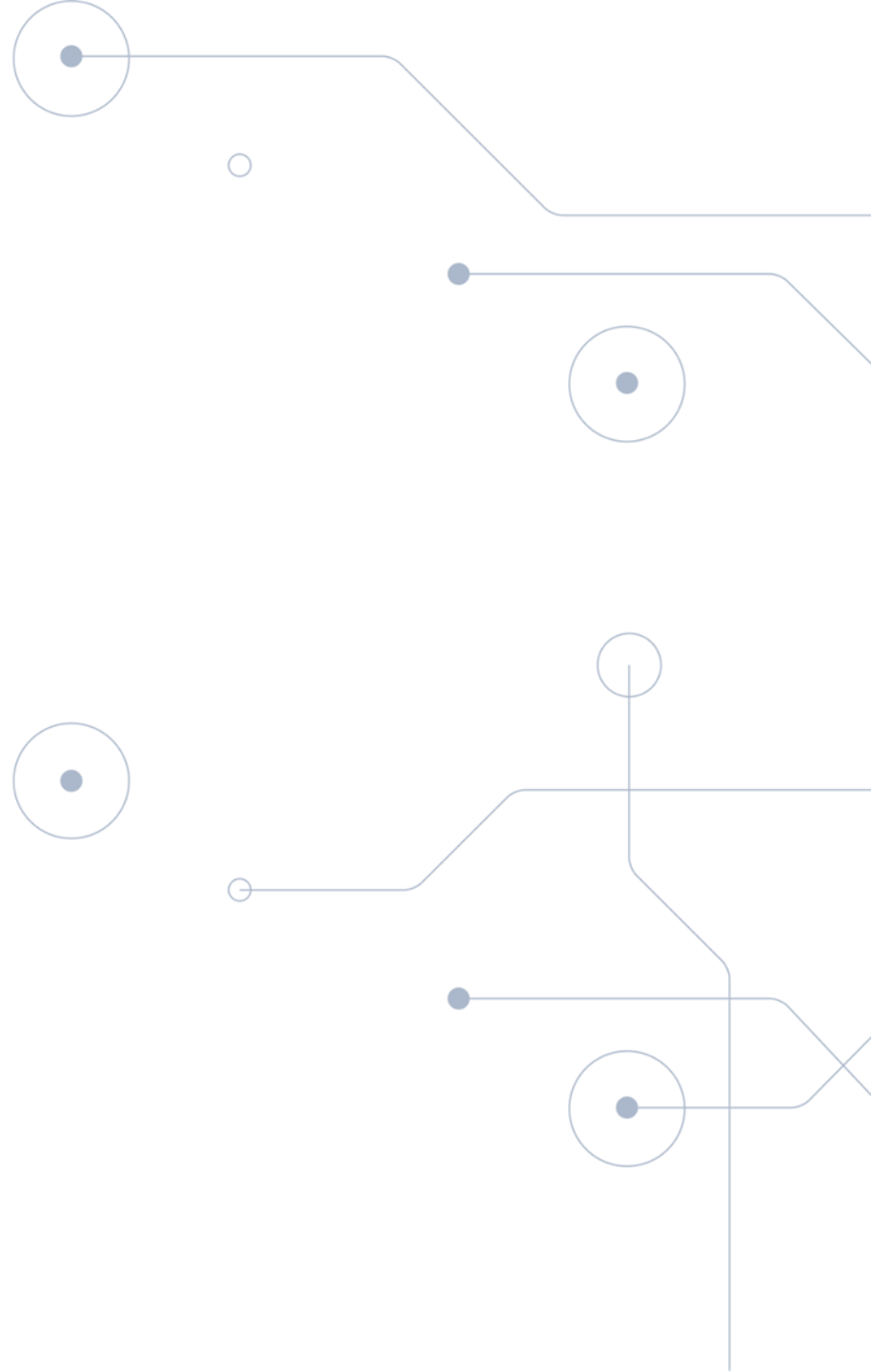
Interaction and outcomes from FRDC Extension Officers  
 Asked to all respondents.

	Wild Catch and Aquaculture (n = 221)	Partners (n = 125)	Research Community (n = 80)
Interacted with the Extension Officers	<b>28%</b>	<b>44%</b>	<b>35%</b>
2022:	17%	40%	10%
<i>Of those who interacted...</i>			
% reported at least one outcome (active or passive)	<b>74%</b>	<b>84%</b>	<b>86%</b>
2022:	59%	68%	75%
<i>Of all respondents...</i>			
Interacted with the Extension Officers AND reported at least one outcome (active or passive)	<b>21%</b>	<b>37%</b>	<b>30%</b>
2022:	10%	28%	7%

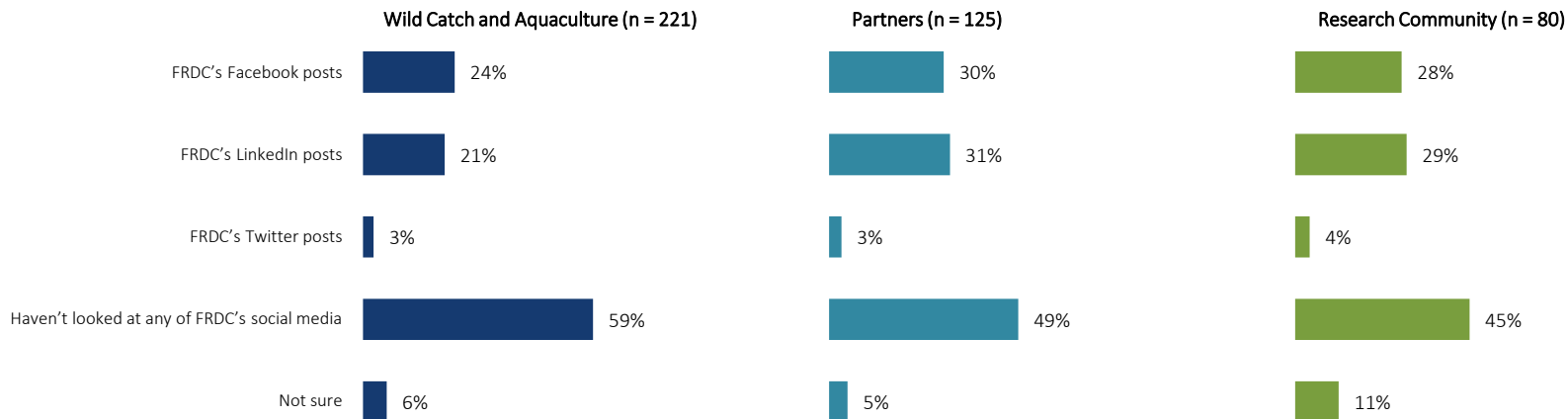
Sub-groups of Fishing & Aquaculture	Aquaculture (n = 103)	Commercial Wild Catch (n = 151)	Supply Chain (n = 102)	Indigenous (n = 23)	Recreational Fishers (n = 39)
Interacted with the Extension Officers	32%	26%	25%	30%	18%
<i>Of those who interacted...</i>					
% reported at least one outcome (active or passive)	73%	85%	69%	71%	86%
<i>Of all respondents...</i>					
Interacted with the Extension Officers AND reported at least one outcome (active or passive)	23%	22%	18%	22%	15%



## Stakeholder experience with: FRDC social media and information



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



	Wild Catch and Aquaculture (n = 221)	Partners (n = 125)	Research Community (n = 80)
% looked at FRDC social media	35%	46%	44%
Looked at Facebook only	13%	14%	15%
Looked at LinkedIn only	10%	16%	16%
Looked at Facebook and LinkedIn	11%	15%	13%
Looked at other combination	1%	1%	0%
Did not look or not sure	65%	54%	56%



# Reported outcomes from engaging with FRDC social media

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

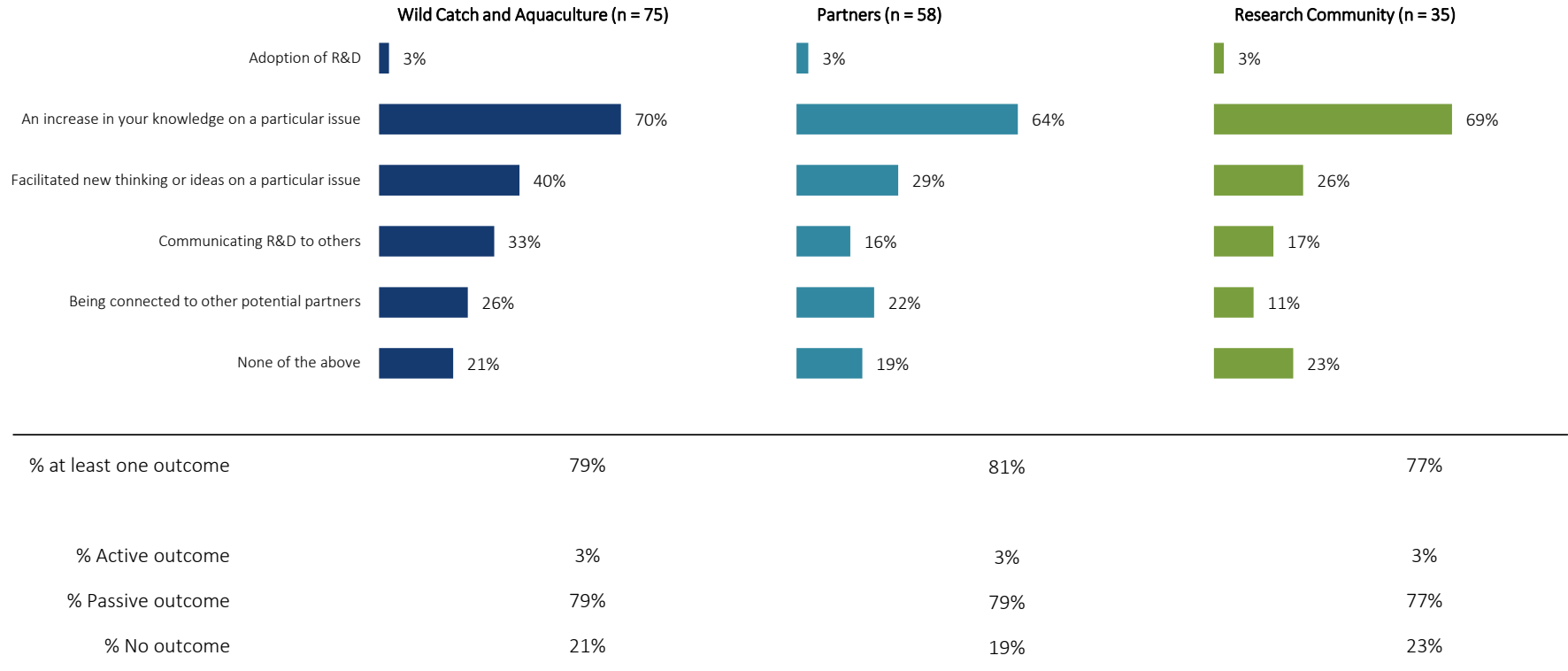
35%

46%

44%

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

Asked to all respondents who have looked at FRDC social media.



# Interaction and outcomes from FRDC social media

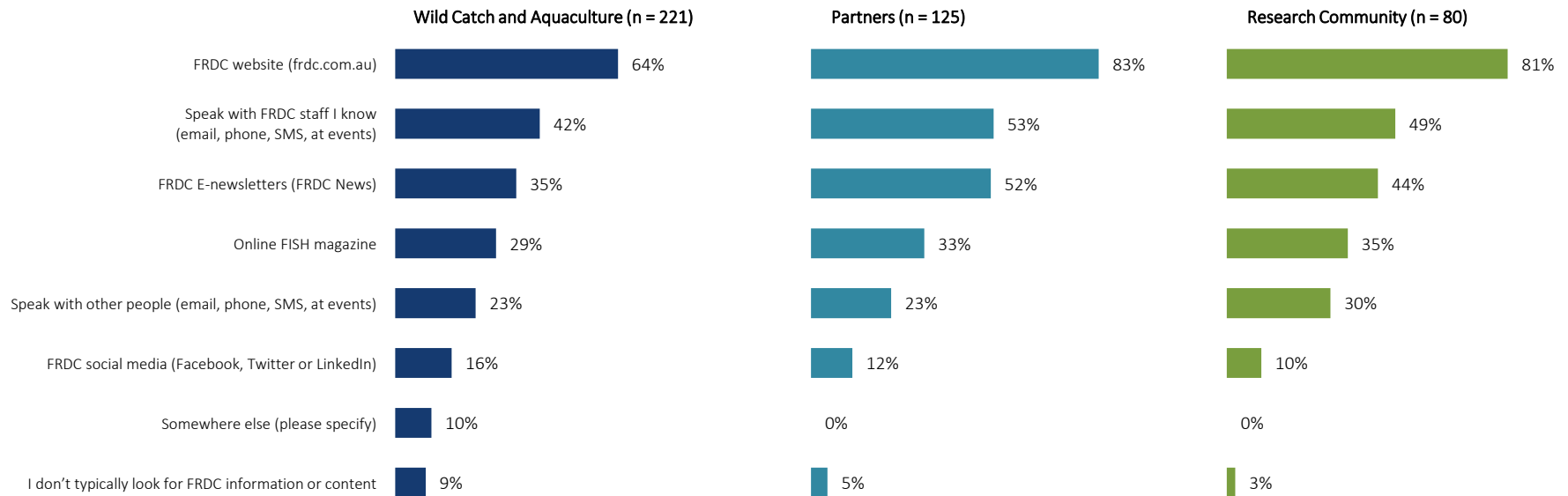
Interaction and outcomes from FRDC social media over the past 12 months  
 Asked to all respondents.

	Wild Catch and Aquaculture (n = 221)	Partners (n = 125)	Research Community (n = 80)
Looked at FRDC social media	<b>35%</b>	<b>46%</b>	<b>44%</b>
2022:	31%	38%	35%
<i>Of those who looked...</i>			
% reported at least one outcome (active or passive)	<b>79%</b>	<b>81%</b>	<b>77%</b>
2022:	69%	92%	72%
<i>Of all respondents...</i>			
Looked at FRDC social media AND reported at least one outcome (active or passive)	<b>27%</b>	<b>38%</b>	<b>34%</b>
2022:	21%	35%	26%

Sub-groups of Fishing & Aquaculture	Aquaculture (n = 103)	Commercial Wild Catch (n = 151)	Supply Chain (n = 102)	Indigenous (n = 23)	Recreational Fishers (n = 39)
Looked at FRDC social media	43%	32%	32%	39%	36%
<i>Of those who looked...</i>					
% reported at least one outcome (active or passive)	73%	84%	79%	78%	64%
<i>Of all respondents...</i>					
Looked at FRDC social media AND reported at least one outcome (active or passive)	31%	27%	25%	30%	23%

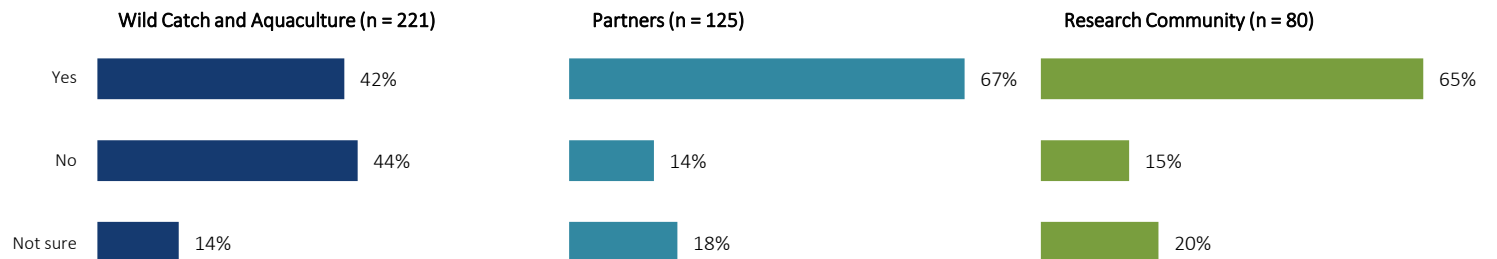
If you were looking for information from FRDC or wanted to find out more about R&D projects and outcomes or see what FRDC supported activities and events were available, where would you prefer to go to find this information or content? Please select all that apply.

Asked to all respondents.



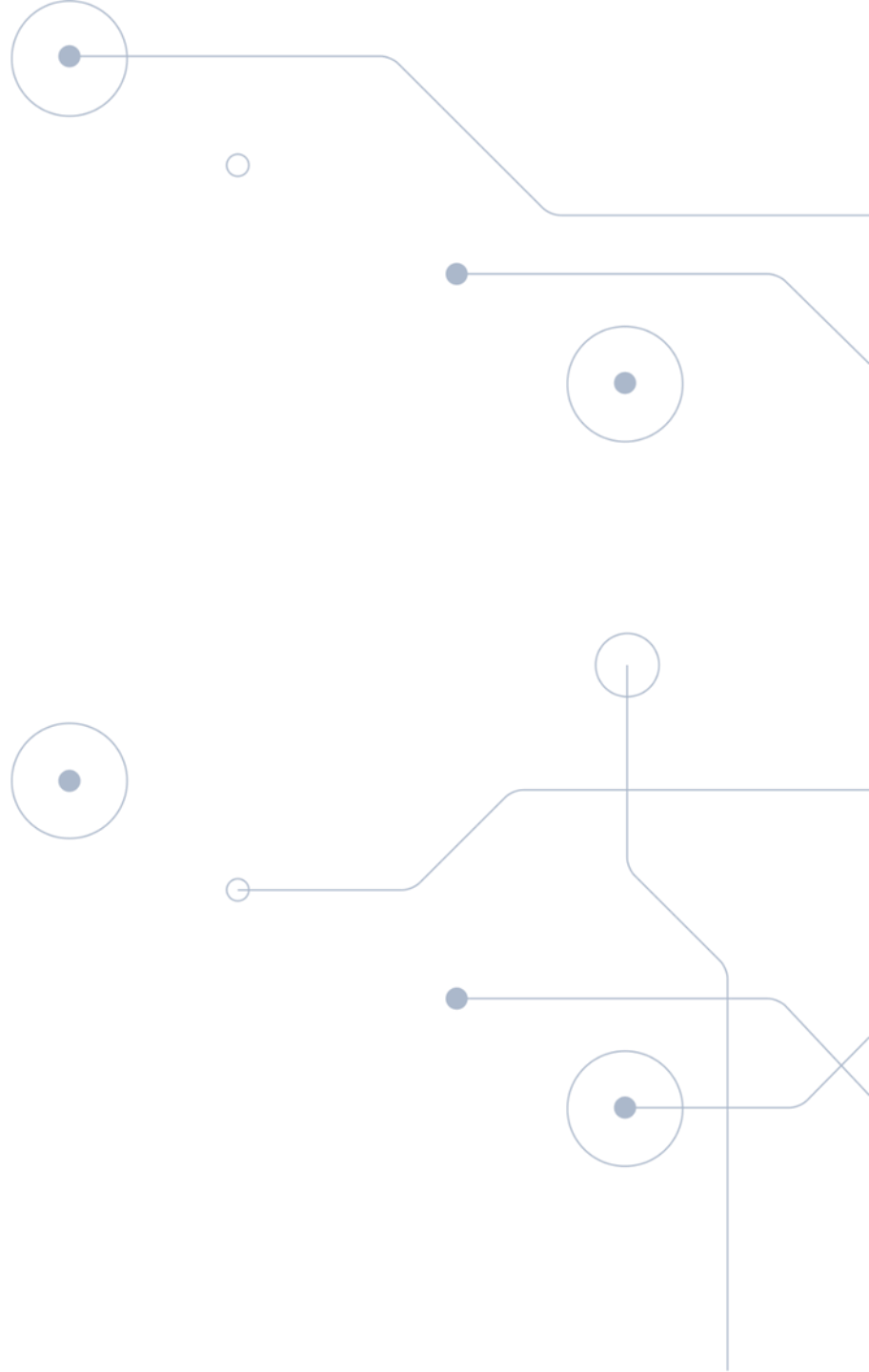
Over the past 12 months, have you come across information from FRDC that has described the impacts of the R&D it has supported?

Asked to all respondents.





## FRDC key indicators

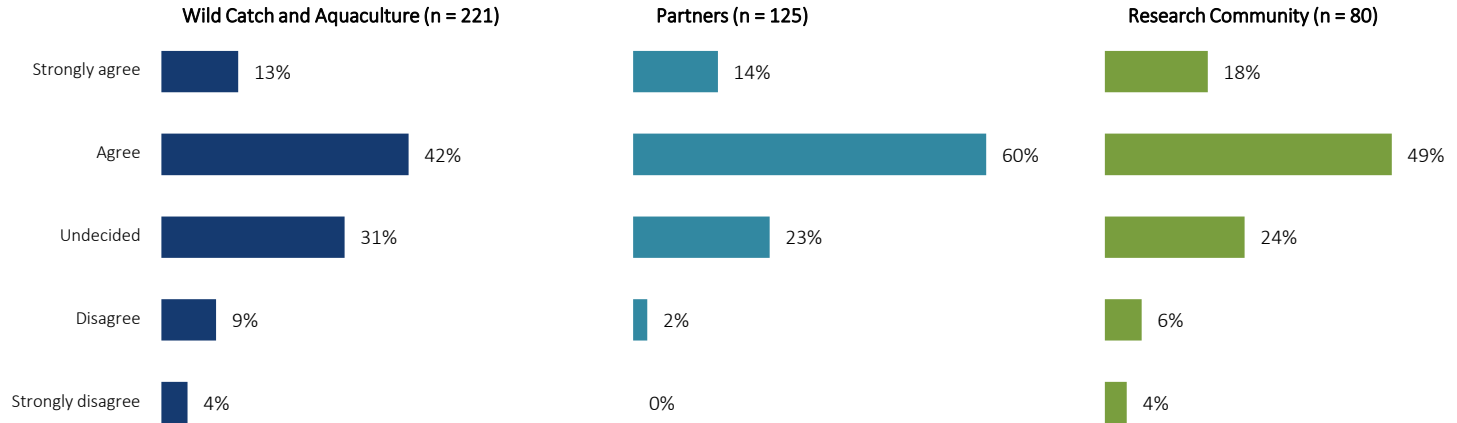


# Transparency in FRDC communication

KPI 5

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

Asked to all respondents.



	Wild Catch and Aquaculture (n = 221)	Partners (n = 125)	Research Community (n = 80)
<b>KPI 5 - % strongly agree + agree</b>	55%	74%	67%
2022:	47%	61%	62%

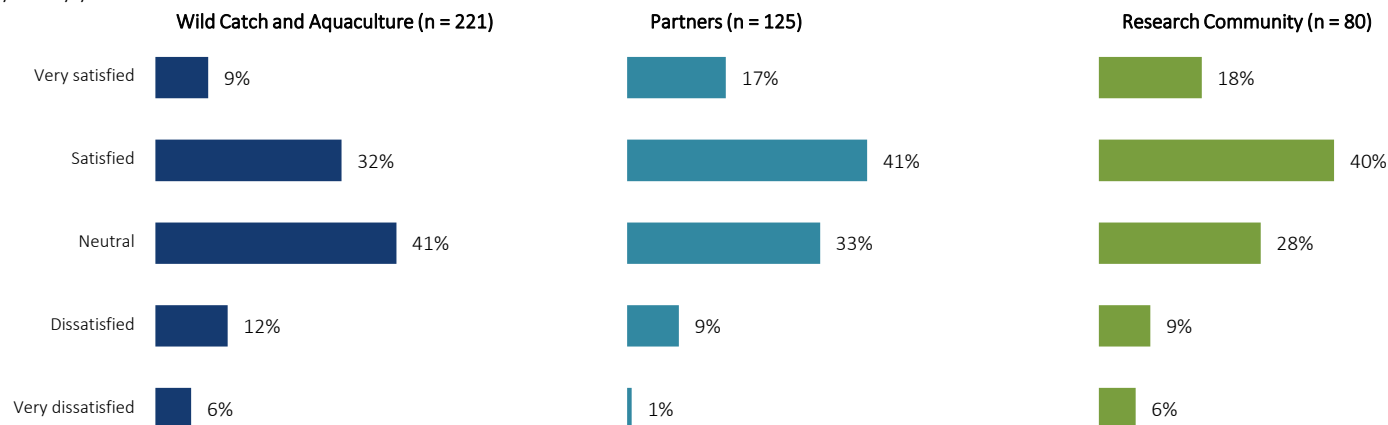
Sub-groups of Fishing & Aquaculture	Aquaculture (n = 103)	Commercial Wild Catch (n = 151)	Supply Chain (n = 102)	Indigenous (n = 23)	Recreational Fishers (n = 39)
<b>KPI 5 - % strongly agree + agree</b>	65%	49%	58%	43%	49%

# Satisfaction with FRDC investment

KPI 2

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

Asked to all respondents.



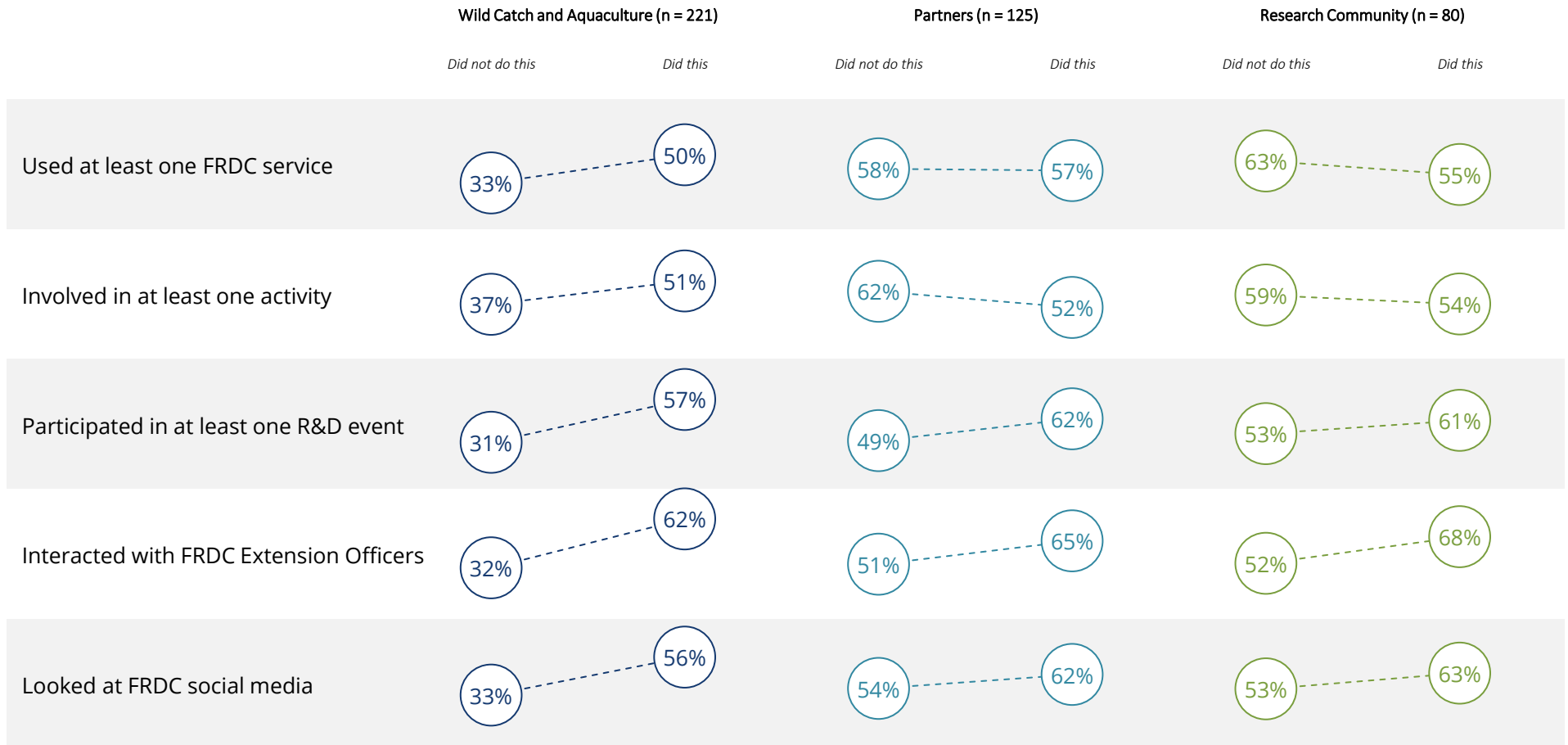
<b>KPI 2 - % very satisfied + satisfied</b>	41%	58%	58%
<b>% very dissatisfied + dissatisfied</b>	18%	10%	15%
<b>NETT Satisfaction*</b>	<b>+23</b>	<b>+48</b>	<b>+43</b>
<b>2022:</b>	<b>+16</b>	<b>+46</b>	<b>+41</b>

Sub-groups of Fishing & Aquaculture	Aquaculture (n = 103)	Commercial Wild Catch (n = 151)	Supply Chain (n = 102)	Indigenous (n = 23)	Recreational Fishers (n = 39)
<b>KPI 2 - % very satisfied + satisfied</b>	50%	34%	41%	17%	46%
<b>% very dissatisfied + dissatisfied</b>	15%	24%	15%	39%	15%
<b>NETT Satisfaction</b>	<b>+35</b>	<b>+10</b>	<b>+26</b>	<b>-22</b>	<b>+31</b>

\*NETT Satisfaction is the difference between the proportion of positive satisfaction responses and negative satisfaction responses. NETT Satisfaction scores are measured with a single question and reported with a number from -100 to +100, where a higher score is desirable.

# Satisfaction with FRDC investment

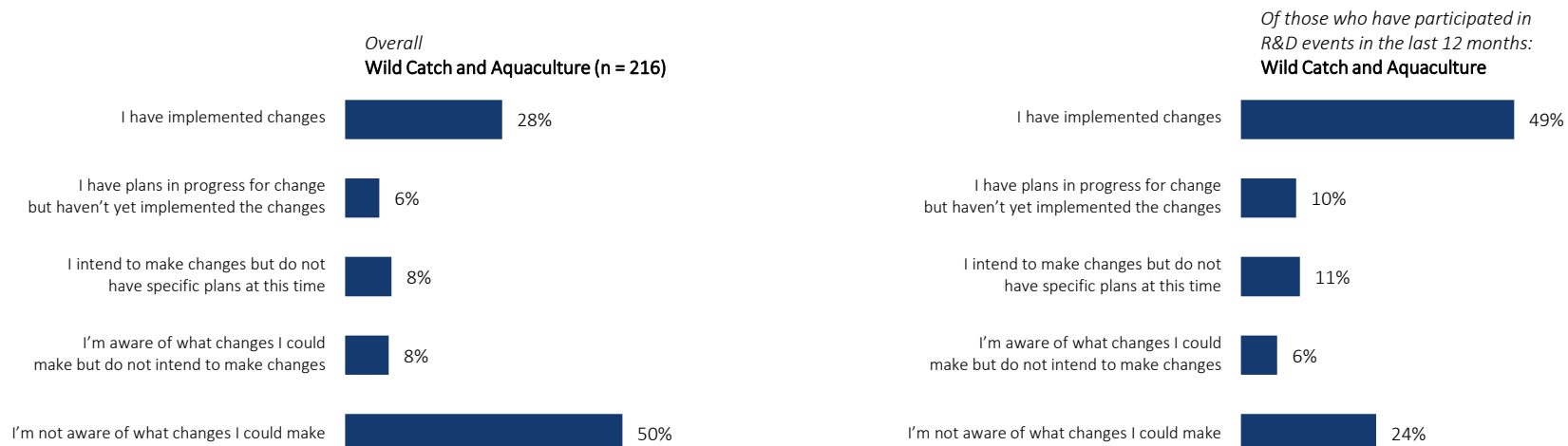
Proportion rating “Very satisfied” or “Satisfied” with FRDC investment across FRDC mechanisms  
Asked to all respondents.



# Changes due to FRDC outcomes

KPI 4

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



Intend to or have made changes	42%	<b>KPI 4 - Intend to or have made changes</b>	70%
2022:	38%	2022:	66%

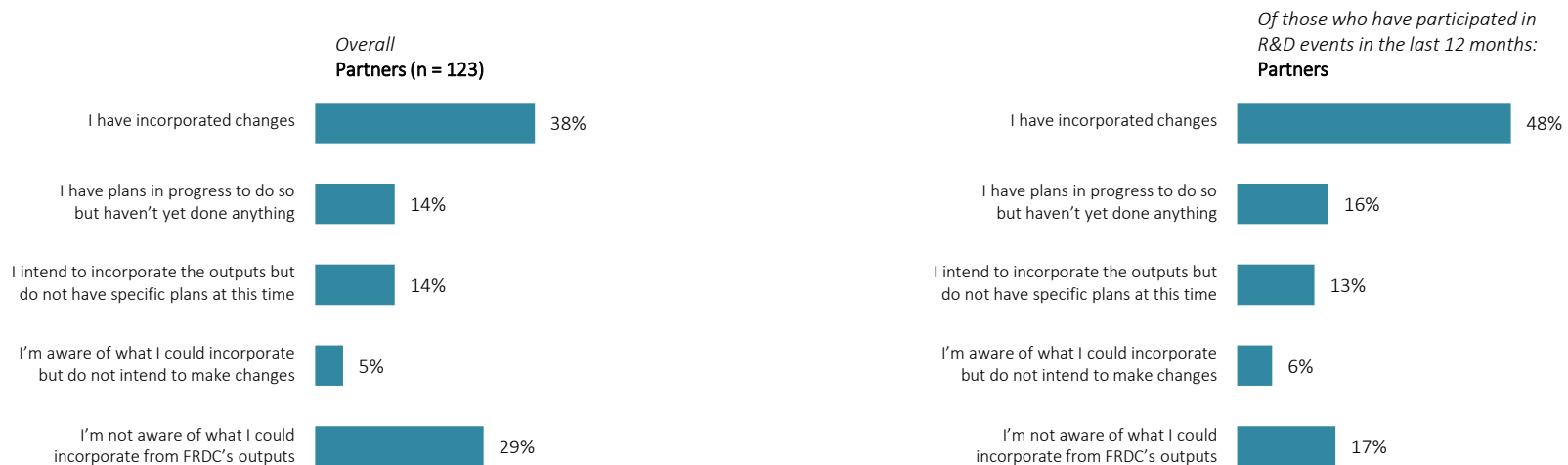
Sub-groups of Fishing & Aquaculture	Aquaculture (n = 99)	Commercial Wild Catch (n = 150)	Supply Chain (n = 101)	Indigenous (n = 20)	Recreational Fishers (n = 37)
<i>Overall:</i> Intend to or have made changes	42%	43%	49%	50%	38%
<i>Of those who have participated in R&amp;D events in the last 12 months:</i> <b>KPI 4 – Intend to or have made changes</b>	73%	64%	66%	86%	63%



# Changes due to FRDC outcomes

KPI 4

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



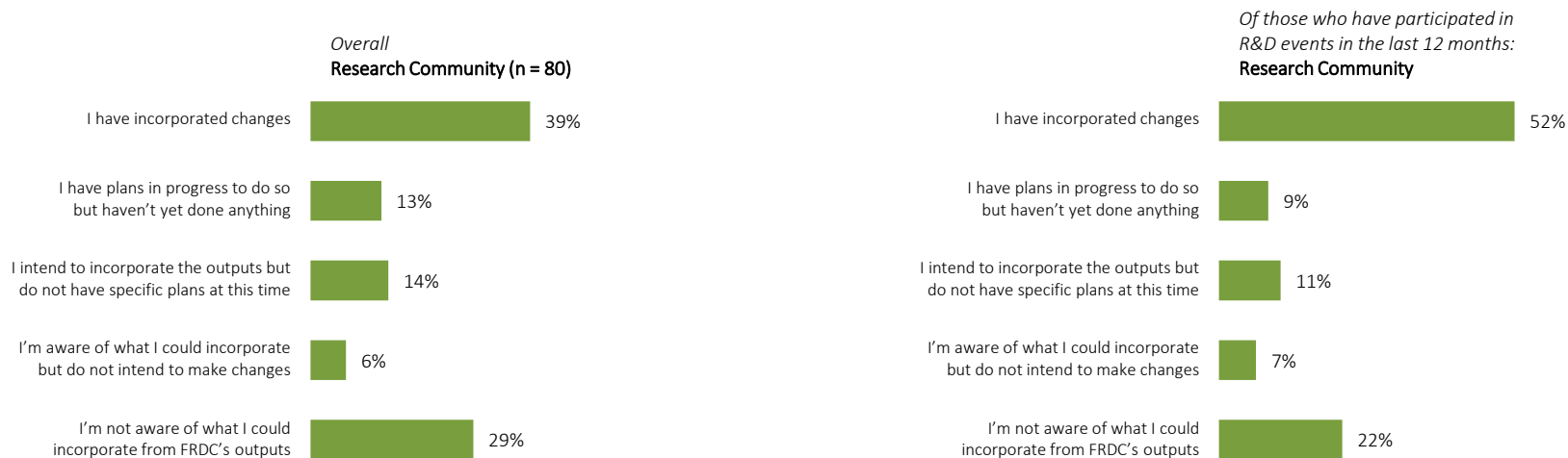
Intend to or have incorporated outputs 66%  
 2022: 67%

**KPI 4 - Intend to or have incorporated outputs** 77%  
 2022: 83%

# Changes due to FRDC outcomes

KPI 4

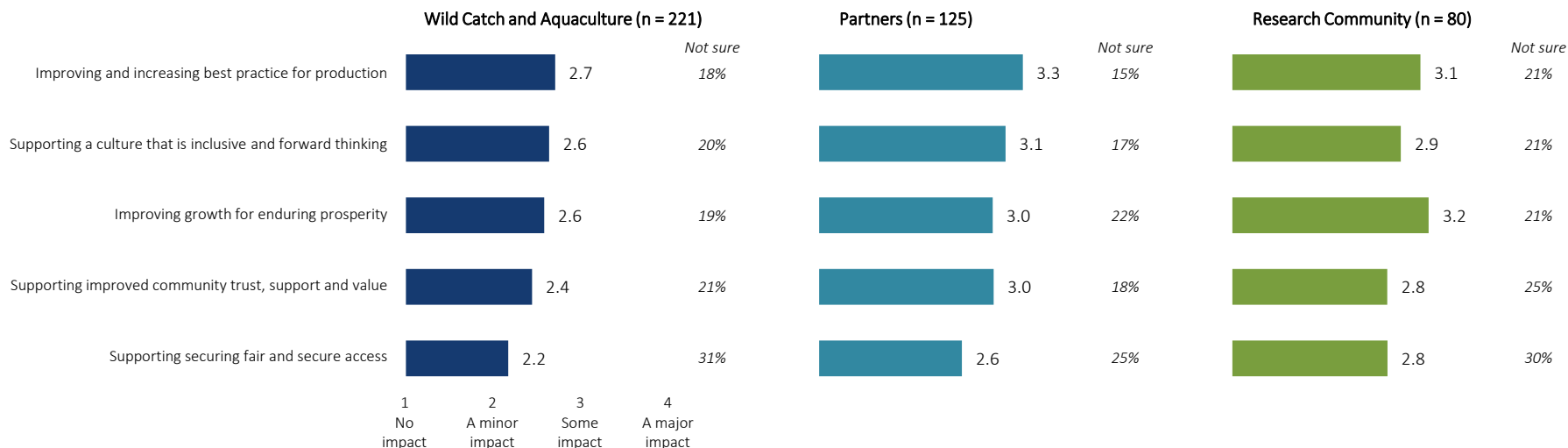
Thinking back over the last 3 years, have you incorporated any of FRDC’s R&D outputs in your work?  
 Asked to all Research Community respondents.



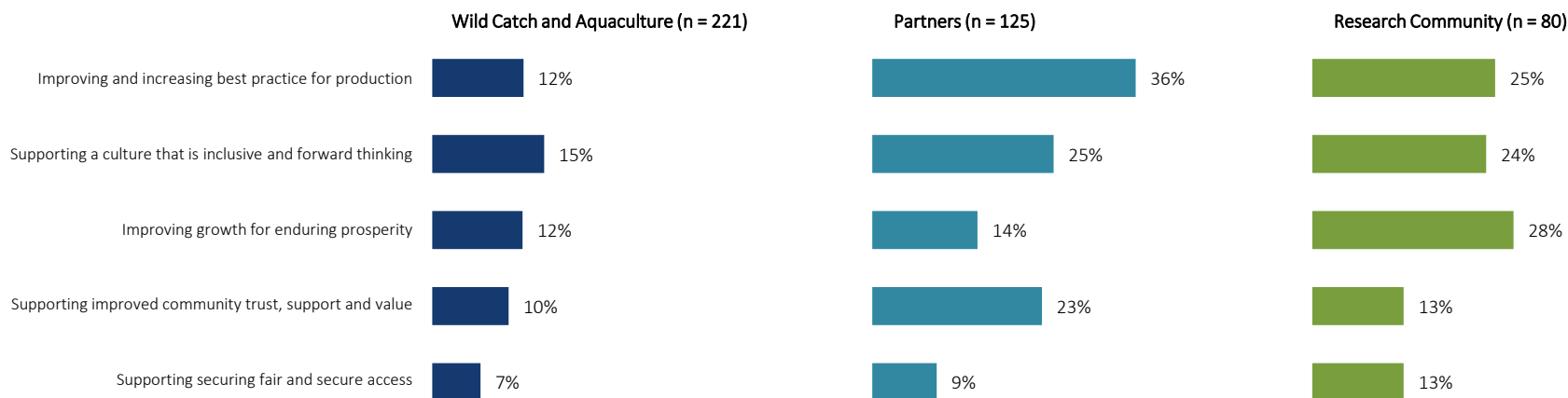
Intend to or have incorporated outputs 65%  
 2022: 55%

**KPI 4 - Intend to or have incorporated outputs** 72%  
 2022: 76%

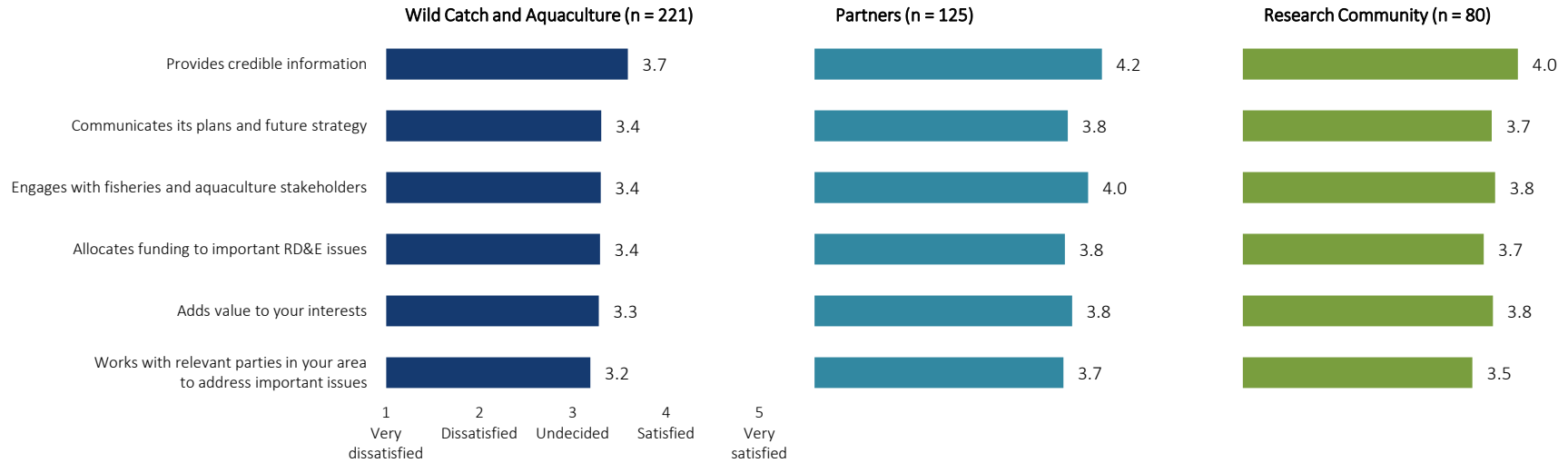
What impact, if any, do you think RD&E activities have had on the following areas for the Fishing and Aquaculture industries over the past 3 years?  
 Asked to all respondents.



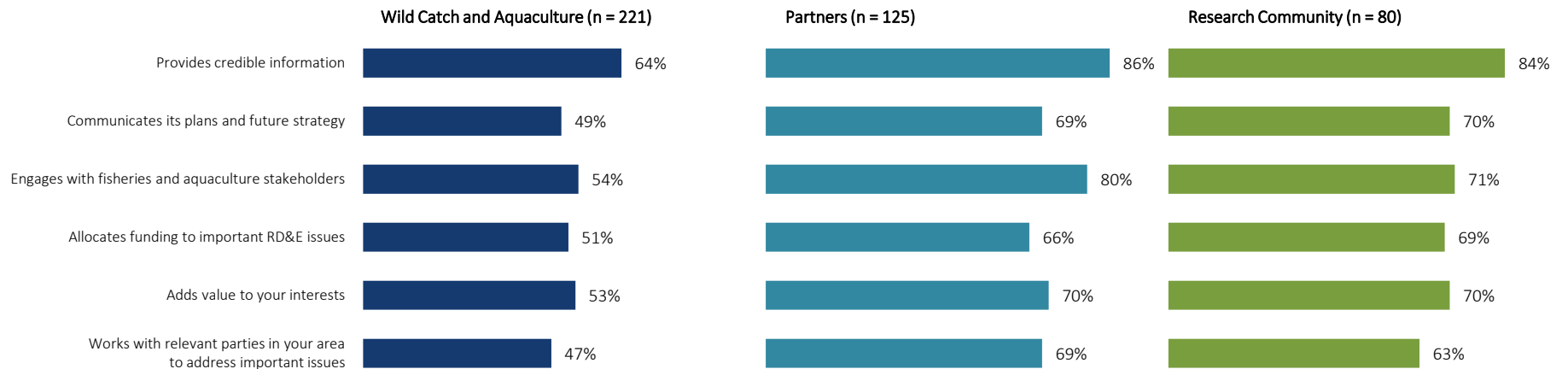
% of respondents rating “a major impact” for each of the following RD&E activities



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

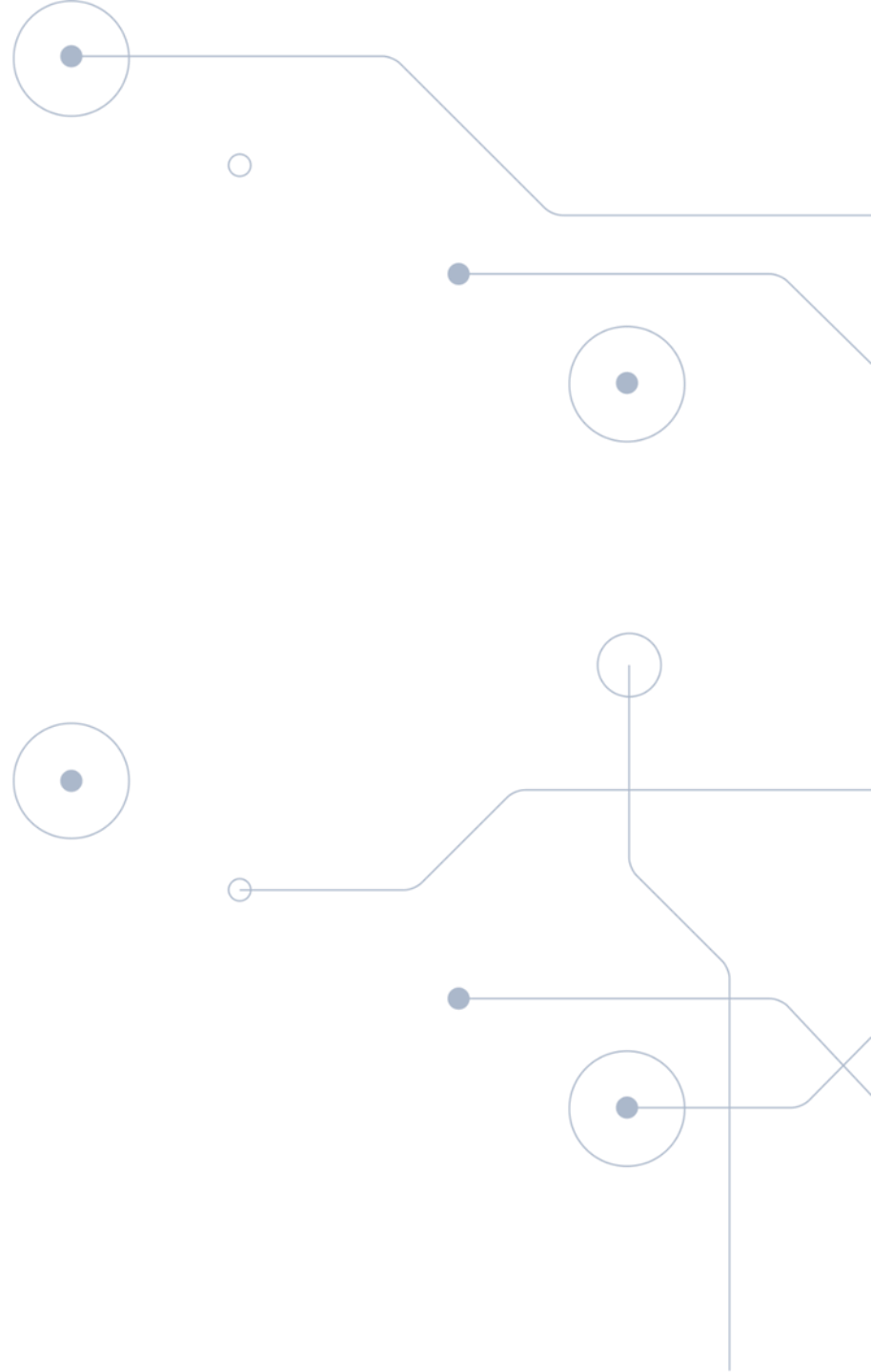


% of respondents rating “very satisfied” or “satisfied” for their satisfaction that FRDC does the following

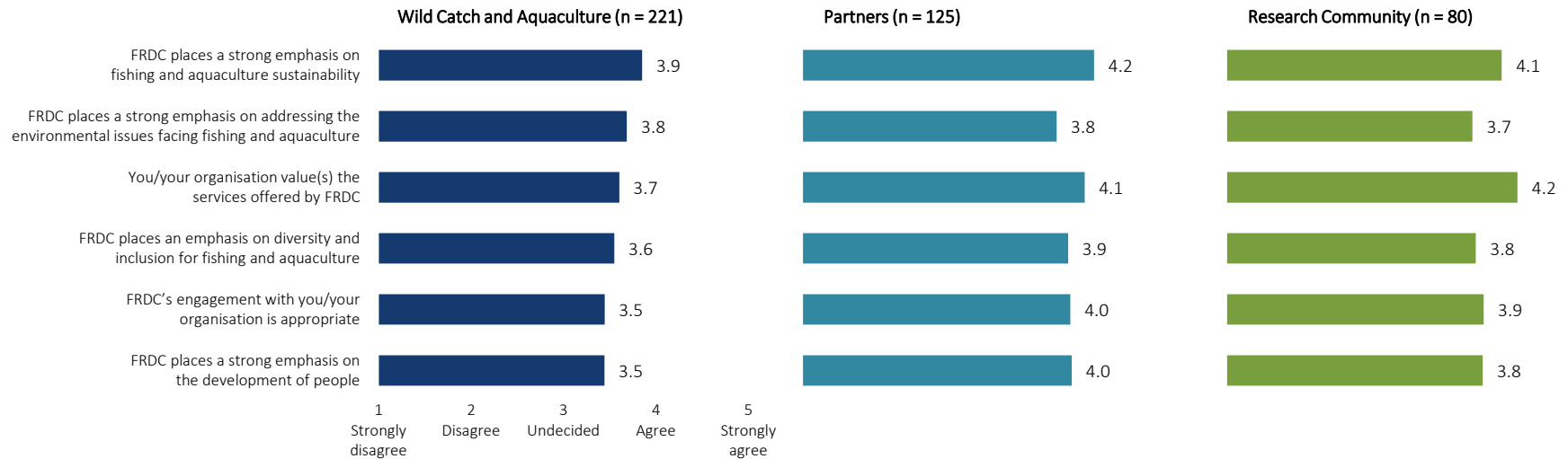




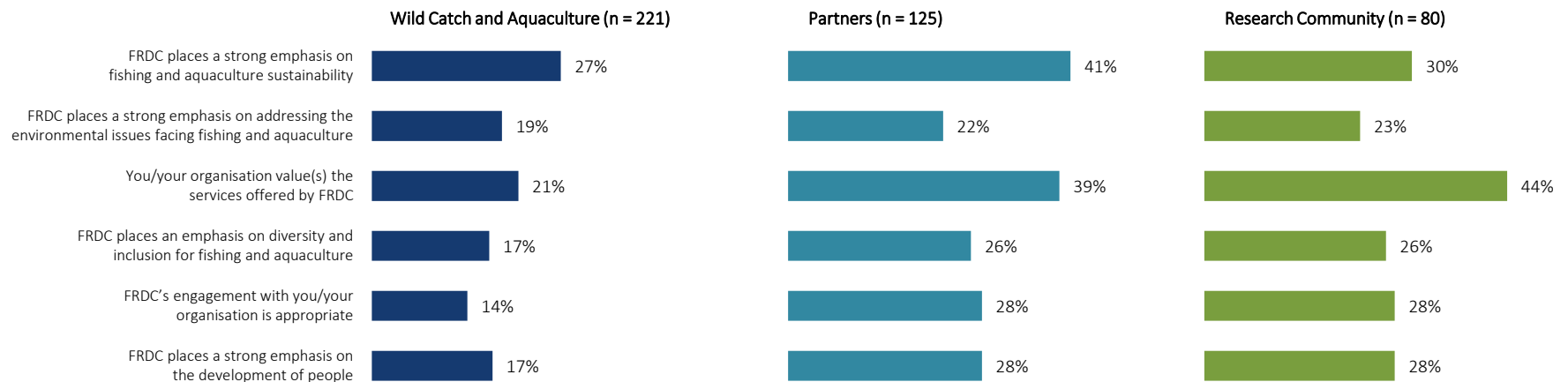
CRRDC KPIs



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



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



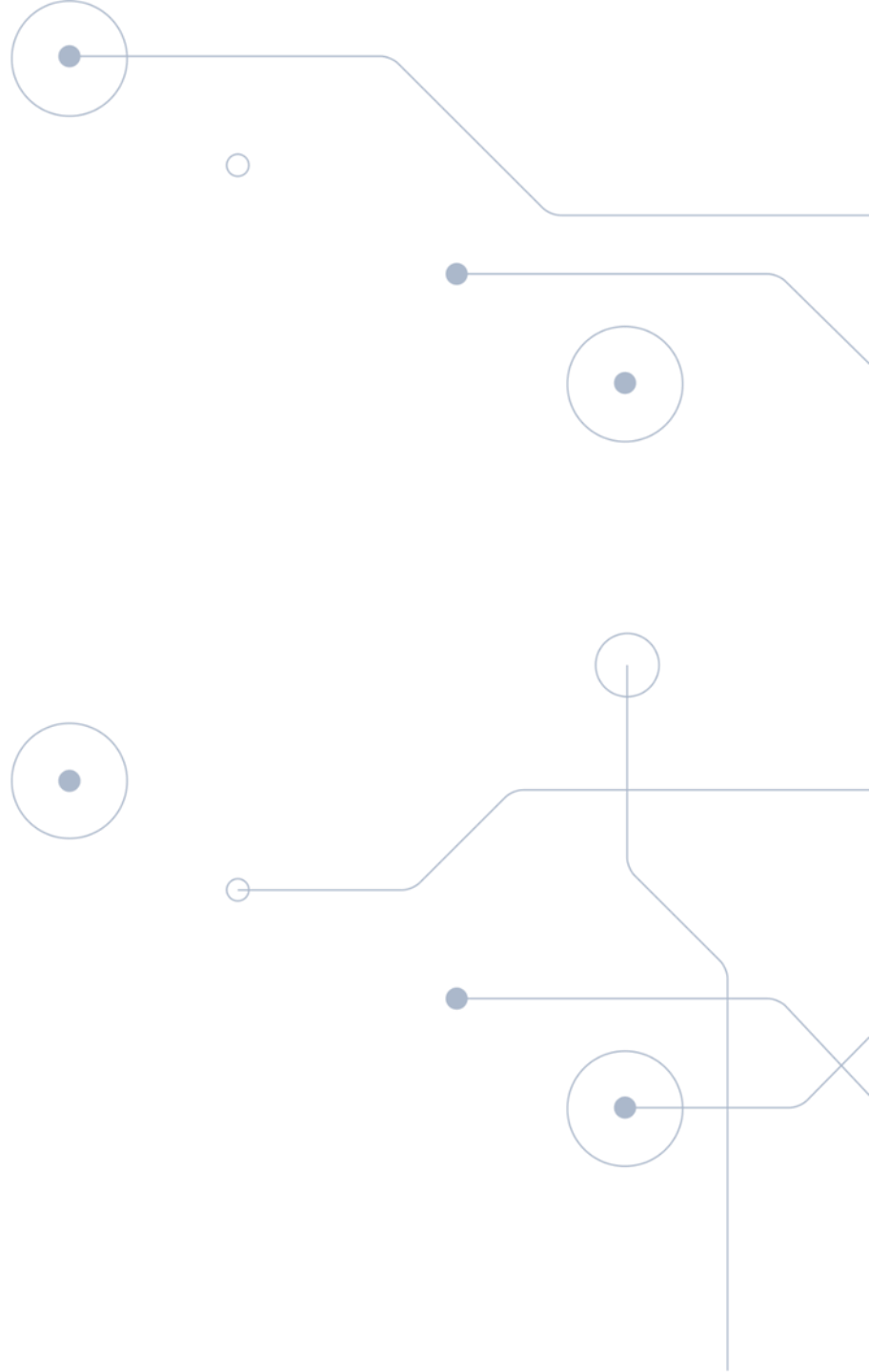
Based on your experience with FRDC over the past 12 months, would you agree or disagree that...  
 Asked to all respondents.

	Wild Catch and Aquaculture (n = 221)			Partners (n = 125)			Research Community (n = 80)		
	% agree	% disagree	NETT	% agree	% disagree	NETT	% agree	% disagree	NETT
FRDC places a strong emphasis on fishing and aquaculture sustainability	78%	9%	+69	87%	3%	+84	81%	5%	+76
FRDC places a strong emphasis on addressing the environmental issues facing fishing and aquaculture	71%	10%	+61	70%	8%	+62	68%	15%	+53
You/your organisation value(s) the services offered by FRDC	63%	13%	+50	84%	6%	+78	85%	4%	+81
FRDC places an emphasis on diversity and inclusion for fishing and aquaculture	58%	10%	+48	73%	3%	+70	63%	9%	+54
FRDC's engagement with you/your organisation is appropriate	61%	17%	+44	78%	6%	+72	70%	9%	+61
FRDC places a strong emphasis on the development of people	51%	13%	+38	76%	4%	+72	66%	8%	+58

\*NETT Agreeance is the difference between the proportion of agree responses and disagree responses.  
 NETT Agreeance scores are measured with a single question and reported with a number from -100 to +100, where a higher score is desirable.



## A summary of impact measures

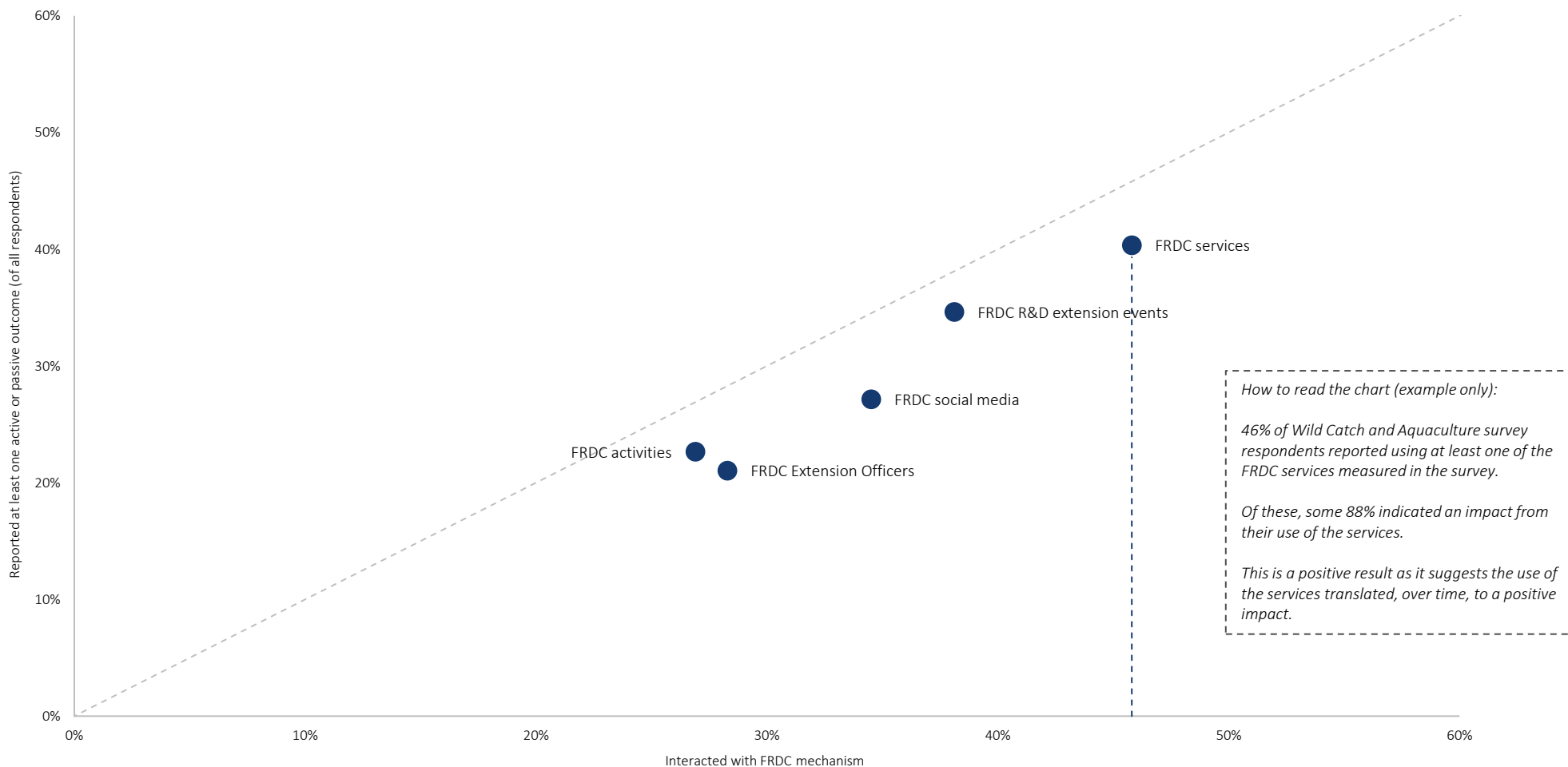




# An overview of the impact of FRDC engagement mechanisms: Wild Catch and Aquaculture

Across the 2023 Stakeholder Survey, respondents were asked to report on their awareness and involvement with various FRDC engagement mechanisms. A measure of the 'impact' of this involvement was also taken.

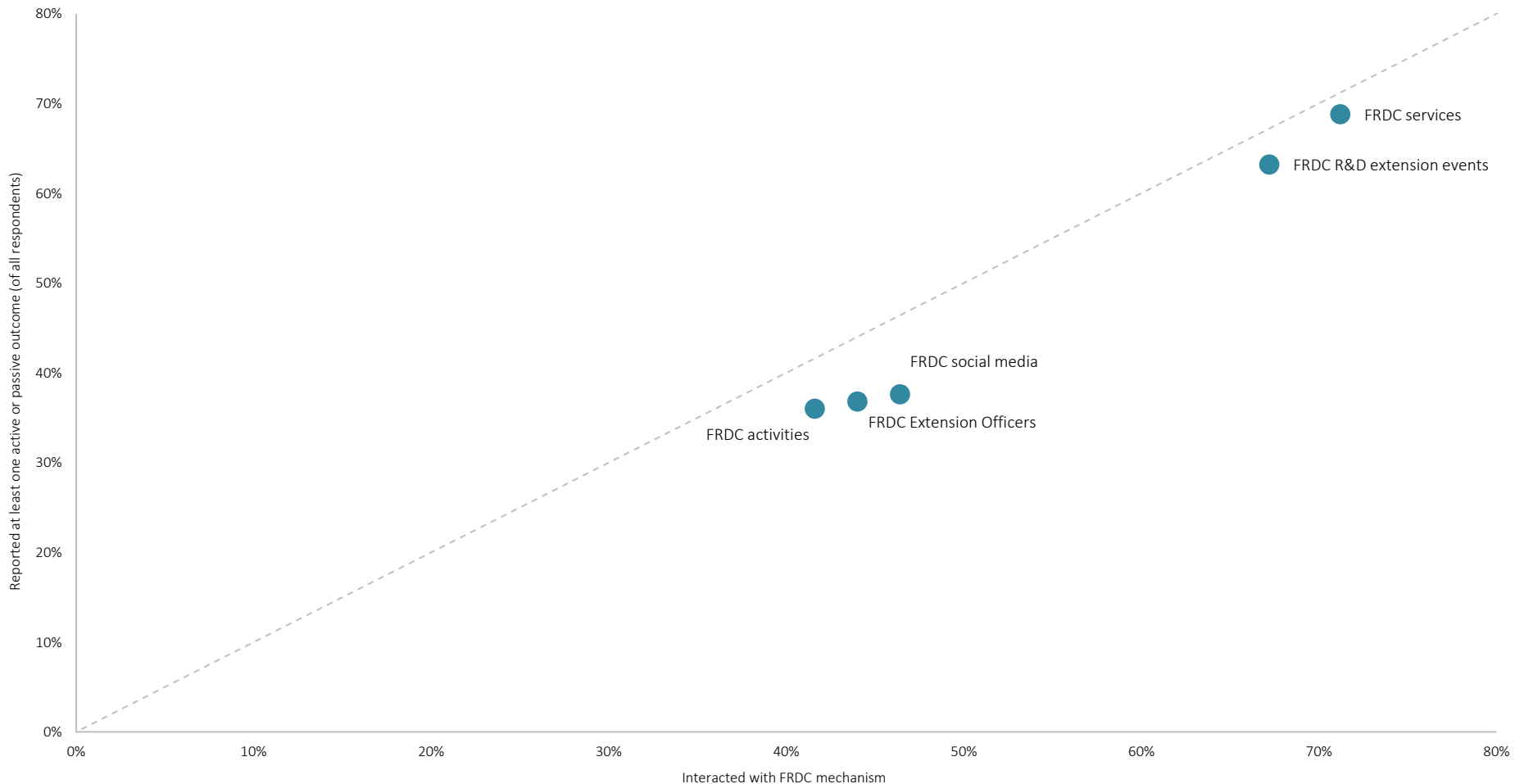
The chart below provides a high-level summary of these results for the Wild Catch and Aquaculture respondents.



# An overview of the impact of FRDC engagement mechanisms: Partners

Across the 2023 Stakeholder Survey, respondents were asked to report on their awareness and involvement with various FRDC engagement mechanisms. A measure of the 'impact' of this involvement was also taken.

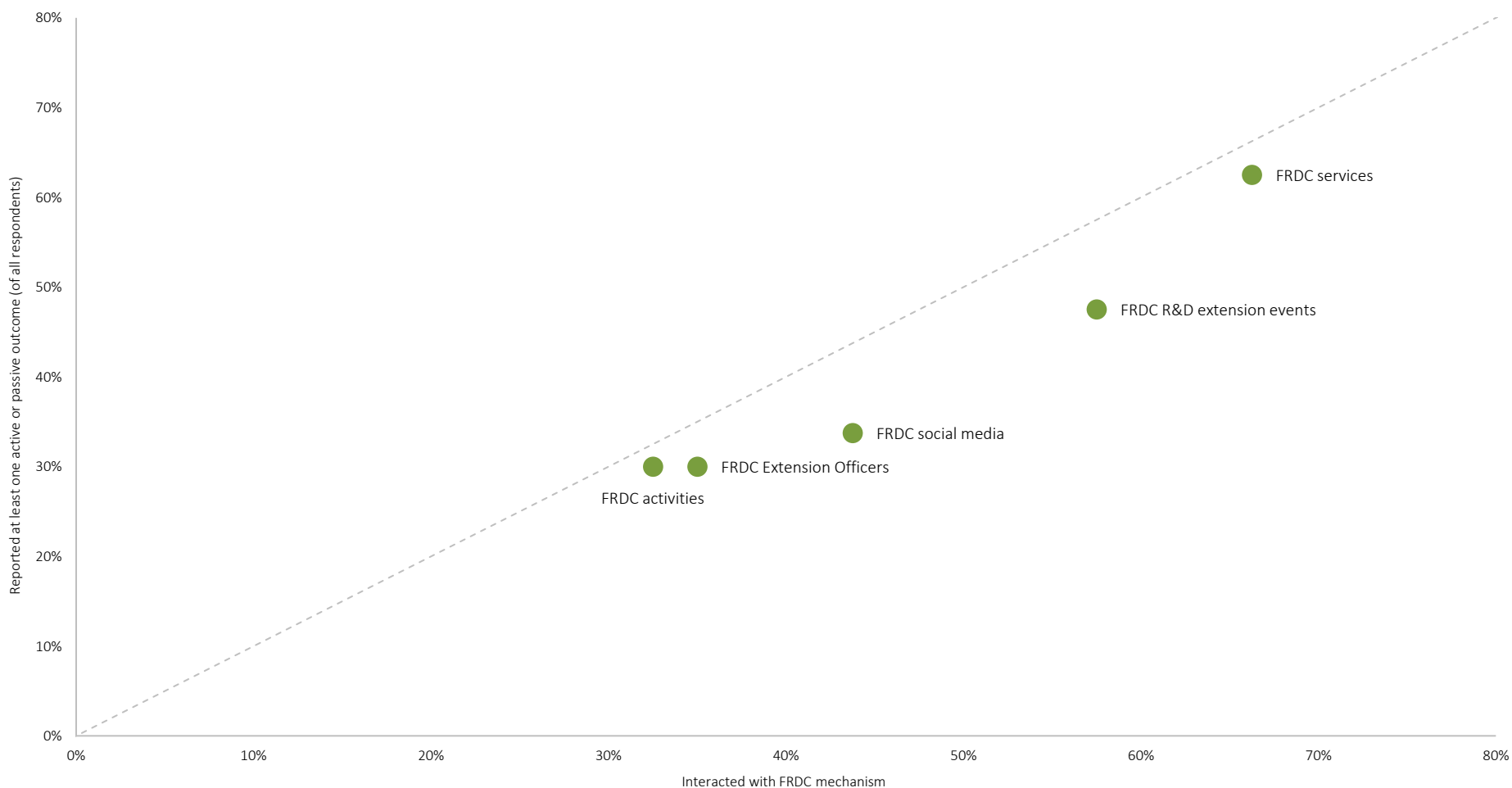
The chart below provides a high-level summary of these results for the Partner respondents.



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

Across the 2023 Stakeholder Survey, respondents were asked to report on their awareness and involvement with various FRDC engagement mechanisms. A measure of the 'impact' of this involvement was also taken.

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





# Appendices



Which of the following sectors of the seafood industry do you operate in? Please select all that apply.	Wild Catch and Aquaculture (n = 221) *	Partners (n = 0)	Research Community (n = 0)
Commercial wild catch	68%	Not asked to this segment	Not asked to this segment
Aquaculture	47%	Not asked to this segment	Not asked to this segment
Processing	22%	Not asked to this segment	Not asked to this segment
Wholesaler	21%	Not asked to this segment	Not asked to this segment
Exporter	19%	Not asked to this segment	Not asked to this segment
Recreational fisher	14%	Not asked to this segment	Not asked to this segment
Indigenous	5%	Not asked to this segment	Not asked to this segment
Importer	5%	Not asked to this segment	Not asked to this segment
Retail	1%	Not asked to this segment	Not asked to this segment

Which of the following best describes your organisation? Please select all that apply.	Wild Catch and Aquaculture (n = 0)	Partners (n = 125)	Research Community (n = 0)
State/Territory Government department or agency	Not asked to this segment	38%	Not asked to this segment
Federal Government department or agency	Not asked to this segment	20%	Not asked to this segment
Not-for profit organisation	Not asked to this segment	16%	Not asked to this segment
Industry association	Not asked to this segment	14%	Not asked to this segment
Fisheries Management	Not asked to this segment	6%	Not asked to this segment
National resource manager	Not asked to this segment	2%	Not asked to this segment

Which of the following best describes your organisation? Please select all that apply.	Wild Catch and Aquaculture (n = 0)	Partners (n = 0)	Research Community (n = 80)
Australian University	Not asked to this segment	Not asked to this segment	56%
Private sector researcher	Not asked to this segment	Not asked to this segment	39%
Government Fisheries Organisation	Not asked to this segment	Not asked to this segment	8%
International Research Organisation	Not asked to this segment	Not asked to this segment	3%
TAFE	Not asked to this segment	Not asked to this segment	1%

Which of the following species categories do you operate in? Please select all that apply.	Wild Catch and Aquaculture (n = 216) *	Partners (n = 0)	Research Community (n = 0)
Finfish	51%	Not asked to this segment	Not asked to this segment
Crustaceans	47%	Not asked to this segment	Not asked to this segment
Molluscs	38%	Not asked to this segment	Not asked to this segment
Other	9%	Not asked to this segment	Not asked to this segment

Which states/territories do you operate in? Please select all that apply.	Wild Catch and Aquaculture (n = 216) *	Partners (n = 0)	Research Community (n = 0)
Queensland	28%	Not asked to this segment	Not asked to this segment
Western Australia	25%	Not asked to this segment	Not asked to this segment
New South Wales	22%	Not asked to this segment	Not asked to this segment
Tasmania	21%	Not asked to this segment	Not asked to this segment
South Australia	17%	Not asked to this segment	Not asked to this segment
Victoria	13%	Not asked to this segment	Not asked to this segment
Northern Territory	13%	Not asked to this segment	Not asked to this segment
Commonwealth	6%	Not asked to this segment	Not asked to this segment
Australian Capital Territory	2%	Not asked to this segment	Not asked to this segment

How long have you been involved with FRDC in this role?	Wild Catch and Aquaculture (n = 0)	Partners (n = 123)	Research Community (n = 80)
More than 2 years	Not asked to this segment	74%	69%
1 year to 2 years	Not asked to this segment	11%	14%
6 to 12 months	Not asked to this segment	12%	10%
Less than 6 months	Not asked to this segment	3%	8%

Which gender do you identify with?	Wild Catch and Aquaculture (n = 220) *	Partners (n = 124)	Research Community (n = 80)
Male	81%	62%	68%
Female	16%	35%	29%
Non-binary	0%	0%	1%
Prefer not to say	3%	3%	3%

Which of the following age groups do you belong to?	Wild Catch and Aquaculture (n = 220) *	Partners (n = 124)	Research Community (n = 80)
18 to 24 years	0%	1%	0%
25 to 34 years	3%	6%	8%
35 to 44 years	14%	23%	18%
45 to 54 years	29%	25%	31%
55 to 64 years	29%	31%	23%
65 years and over	25%	15%	21%




Are you of Aboriginal or Torres Strait Islander origin?	Wild Catch and Aquaculture (n = 220) *	Partners (n = 124)	Research Community (n = 80)
No, not Aboriginal or Torres Strait Islander	89%	94%	91%
Yes, Aboriginal	4%	2%	1%
Yes, Torres Strait Islander	0%	1%	0%
Yes, Aboriginal and Torres Strait Islander	1%	0%	0%
Don't know / prefer not to say	6%	4%	9%

What was your total revenue in the last financial year, ending June 30, 2023?	Wild Catch and Aquaculture (n = 213) *	Partners (n = 0)	Research Community (n = 0)
Less than \$1M	49%	Not asked to this segment	Not asked to this segment
\$1M to less than \$2M	9%	Not asked to this segment	Not asked to this segment
\$2M to less than \$5M	7%	Not asked to this segment	Not asked to this segment
\$5M to less than \$10M	5%	Not asked to this segment	Not asked to this segment
\$10M or more	19%	Not asked to this segment	Not asked to this segment
Prefer not to say	11%	Not asked to this segment	Not asked to this segment


# Stakeholder Snapshot: Sub-group – Aquaculture

Sample size: n = 103



## Key metrics

	50%	% satisfied that financial contributions to FRDC are being invested wisely and benefit the fishing and aquaculture sectors and the Aus community
	65%	% agree that FRDC is transparent in how it communicates the impacts of R&D it has supported
	42%	Intend to or have made changes to practices because of outcomes from FRDC info, services or R&D projects over the last 3 years

## Industry sentiment

	+48	NETT Sentiment of the future of Aus fishing / aquaculture industry over the next 12 months (scale of -100 to +100)
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## What FRDC does directly

	99%	% who recall at least one FRDC responsibility and role (when prompted with a list)
	34%	% who recall all three FRDC responsibilities and roles (when prompted with a list)

## FRDC mechanisms and outcomes

Interaction with FRDC mechanism	Did this	Reported an outcome *
Used at least one FRDC service	42%	91%
Involved in at least one activity	27%	89%
Participated in at least one R&D event	38%	92%
Interacted with the Extension Officers	32%	73%
Looked at FRDC social media	43%	73%

## Statements about FRDC

	% agree	
FRDC places a strong emphasis on fishing and aquaculture sustainability	83%	
FRDC places a strong emphasis on addressing the environmental issues facing fishing and aquaculture	75%	
You/your organisation value(s) the services offered by FRDC	69%	
FRDC's engagement with you/your organisation is appropriate	67%	
FRDC places an emphasis on diversity and inclusion for fishing and aquaculture	62%	
FRDC places a strong emphasis on the development of people	52%	

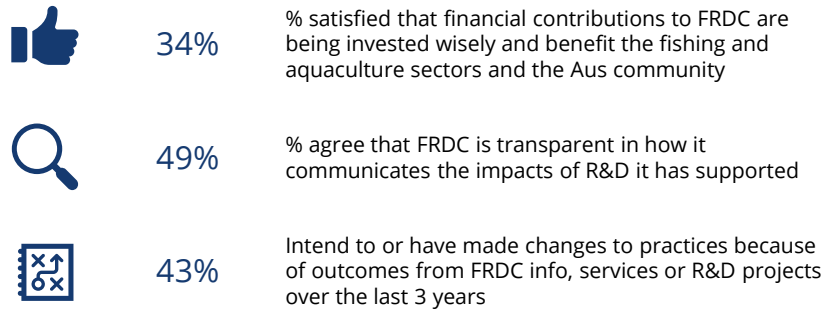
\*Reported an outcome: Interaction with the FRDC mechanism led to one or more of the following outcomes: adoption of R&D, an increase in your knowledge on a particular issue, facilitated new thinking or ideas on a particular issue, communicating R&D to others, being connected to other potential partners.



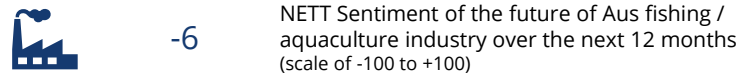
# Stakeholder Snapshot: Sub-group – Commercial wild catch

Sample size: n = 151

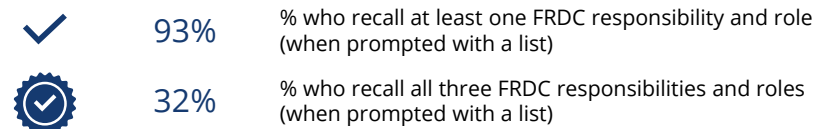
## Key metrics



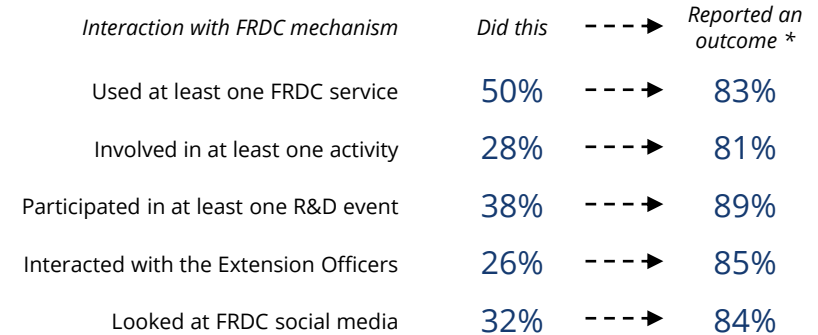
## Industry sentiment



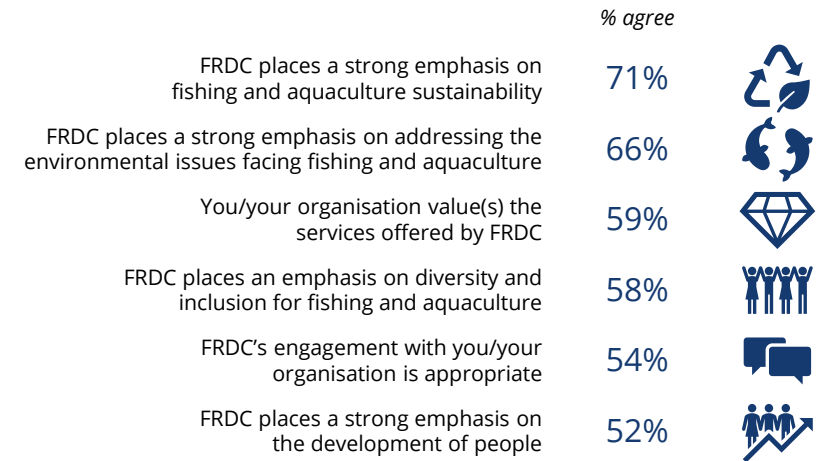
## What FRDC does directly



## FRDC mechanisms and outcomes



## Statements about FRDC






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


# Stakeholder Snapshot: Sub-group – Supply chain

Exporter / Importer / Processing / Wholesaler. Sample size: n = 102



## Key metrics

	41%	% satisfied that financial contributions to FRDC are being invested wisely and benefit the fishing and aquaculture sectors and the Aus community
	58%	% agree that FRDC is transparent in how it communicates the impacts of R&D it has supported
	49%	Intend to or have made changes to practices because of outcomes from FRDC info, services or R&D projects over the last 3 years

## Industry sentiment

	+17	NETT Sentiment of the future of Aus fishing / aquaculture industry over the next 12 months (scale of -100 to +100)
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## What FRDC does directly

	97%	% who recall at least one FRDC responsibility and role (when prompted with a list)
	35%	% who recall all three FRDC responsibilities and roles (when prompted with a list)

## FRDC mechanisms and outcomes

Interaction with FRDC mechanism	Did this	Reported an outcome *
Used at least one FRDC service	57%	86%
Involved in at least one activity	22%	91%
Participated in at least one R&D event	34%	91%
Interacted with the Extension Officers	25%	69%
Looked at FRDC social media	32%	79%

## Statements about FRDC




	% agree	
FRDC places a strong emphasis on fishing and aquaculture sustainability	78%	
FRDC places a strong emphasis on addressing the environmental issues facing fishing and aquaculture	72%	
You/your organisation value(s) the services offered by FRDC	66%	
FRDC places an emphasis on diversity and inclusion for fishing and aquaculture	61%	
FRDC's engagement with you/your organisation is appropriate	58%	
FRDC places a strong emphasis on the development of people	57%	

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


# Stakeholder Snapshot: Sub-group – Indigenous

Sample size: n = 23



## Key metrics

	17%	% satisfied that financial contributions to FRDC are being invested wisely and benefit the fishing and aquaculture sectors and the Aus community
	43%	% agree that FRDC is transparent in how it communicates the impacts of R&D it has supported
	50%	Intend to or have made changes to practices because of outcomes from FRDC info, services or R&D projects over the last 3 years

## Industry sentiment

	+18	NETT Sentiment of the future of Aus fishing / aquaculture industry over the next 12 months (scale of -100 to +100)
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## What FRDC does directly

	87%	% who recall at least one FRDC responsibility and role (when prompted with a list)
	30%	% who recall all three FRDC responsibilities and roles (when prompted with a list)

## FRDC mechanisms and outcomes

Interaction with FRDC mechanism	Did this	Reported an outcome *
Used at least one FRDC service	26%	100%
Involved in at least one activity	13%	67%
Participated in at least one R&D event	35%	75%
Interacted with the Extension Officers	30%	71%
Looked at FRDC social media	39%	78%

## Statements about FRDC

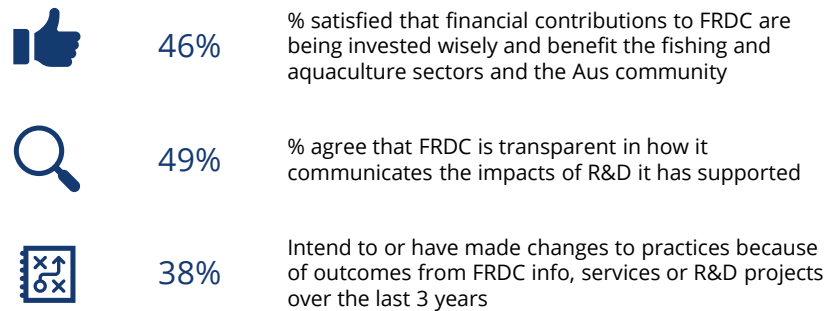
	% agree	
FRDC places a strong emphasis on fishing and aquaculture sustainability	65%	
You/your organisation value(s) the services offered by FRDC	57%	
FRDC places a strong emphasis on addressing the environmental issues facing fishing and aquaculture	52%	
FRDC's engagement with you/your organisation is appropriate	48%	
FRDC places an emphasis on diversity and inclusion for fishing and aquaculture	43%	
FRDC places a strong emphasis on the development of people	35%	

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

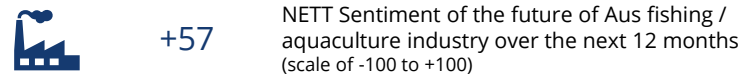
# Stakeholder Snapshot: Sub-group – Rec Fisher ONLY

Sample size: n = 39

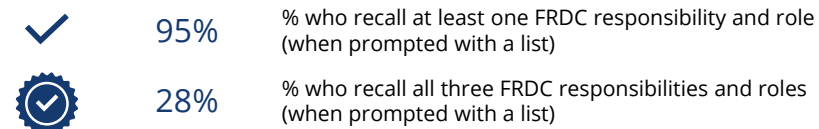
## Key metrics



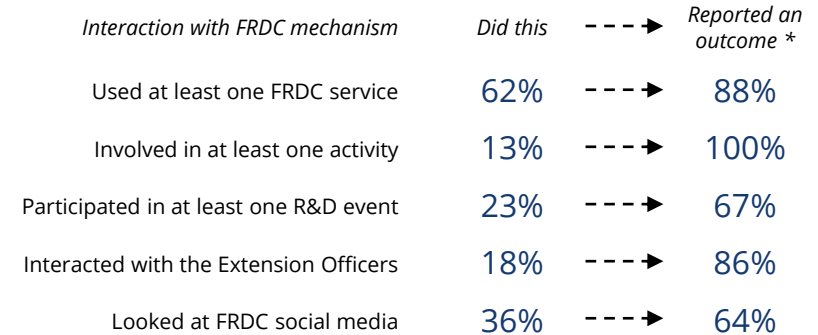
## Industry sentiment



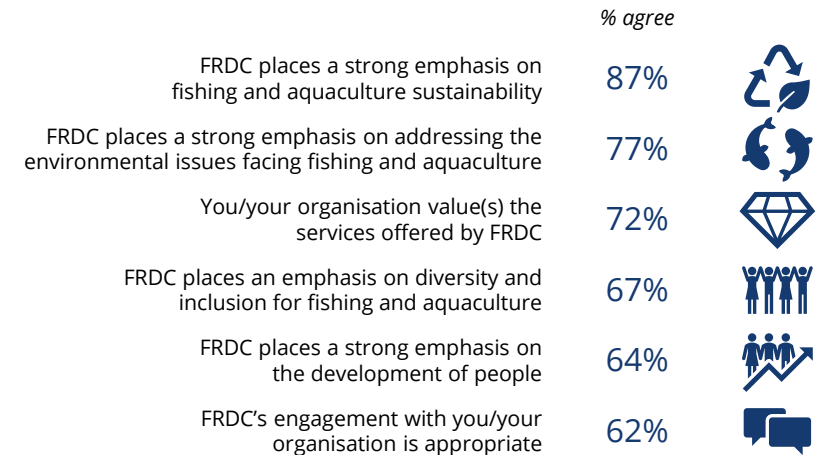
## What FRDC does directly



## FRDC mechanisms and outcomes



## Statements about FRDC



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

## Research design

A strong and mature relationship between FRDC and its stakeholders, which acknowledges FRDC's goals but at the same time the operating pressures stakeholders confront, underpins the pathway to success for the FRDC Strategic Plan. FRDC have identified the need to measure the engagement and satisfaction of a range of its key stakeholders. The 2023 Stakeholder Survey provides the mechanism to collect feedback and provide FRDC with measures of the health of their stakeholder relationships and the perception of progress against the Strategic Plan targets.

## Target audiences

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

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

## Methodology

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

## Questionnaire

The 2023 FRDC Stakeholder Research involved a 17-minute questionnaire of up to 33 questions. This measured, amongst other things:

- Stakeholder sentiment
- CRRDC KPI's
- Feedback on FRDC services
- Feedback on the FRDC Extension Officer Network (EON)
- Communications from FRDC
- FRDC key indicators
- Respondent profiles
- Voice of the stakeholder

## Sample and Response

A sample list of stakeholders for this research was provided by FRDC. In total, n = 522 interviews were completed with stakeholders. This included:

- n = 317 Fishing and Aquaculture (including the Wild Catch and Aquaculture segment of n = 221 – those who self-identified as being involved in commercial wild catch and/or aquaculture operating businesses);
- n = 125 Partners; and
- n = 80 Research Community.

## Timing

The data collection for the 2023 FRDC Stakeholder Research was undertaken between the 1<sup>st</sup> November 2023 to the 8<sup>th</sup> December 2023.

## Weighting

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

## 2023 FRDC Stakeholder Research December 2023

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



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

[www.intuitivesolutions.com.au](http://www.intuitivesolutions.com.au)