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Alaska Fisheries  
Science Center

# GOA Groundfish Trawl Bycatch Management Voluntary Social Survey: Preliminary Results

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Presented to the North Pacific Fishery Management Council

October, 2014



# Purpose of Social Survey

- To create a social baseline of participants in the GOA groundfish trawl fisheries to assess future changes
  - Not an impact assessment
- Helps contextualize potential impacts of the preferred program compared to the alternatives
- Follow-up study after implementation will help us to:
  - Better understand social impacts of the program in the future by tracking changes in the social structure of the fisheries
  - Assess the impact of GOA bycatch management program on place- and sector-based communities



## Council's Goals for GOA Bycatch Management (Feb 2013)

Purpose and need statement of GOA trawl catch share program -  
**Goal 6:**

*"Promote community stability and minimize adverse economic impacts by limiting consolidation, providing employment and entry opportunities, and increasing the economic viability of the groundfish harvesters, processors, and support industries."*

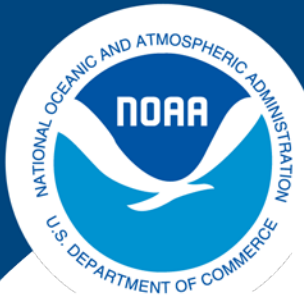
**Motion for development of an economic data collection:**

*"The Council is interested in developing a data collection program that .... can be used to assess the impacts of a catch share program on affected harvesters, processors, and communities in the GOA."*



# Today's Goal

- Introduce Preliminary Survey Results to the Council
- Give examples of information obtained
- Demonstrate potential uses of data
- Ask for feedback from the Council on future work



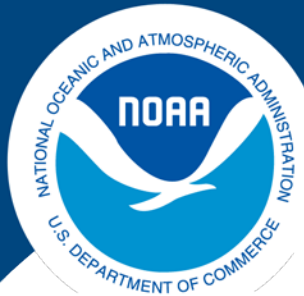
# Survey Methods

- Survey designed with Council staff, AK Regional Office, and industry input
- Attempted to get a census of GOA trawl groundfish participants using a mixed methods approach
- Survey could be completed
  - In-person
  - Online
  - Over the phone
  - By mail

# Respondents

Sector	Number of Respondents	Response Rate
Catcher Vessel Owners	46	56%
Catcher Vessel Skippers/ Crew	103	34%
Catcher Processor Owners	1	13%
Catcher Processor Crew	15	2%
Inshore Processing Managers	23	77%
Inshore Processing Workers	1,269	72%
Fishery Support Businesses	95	46%
Tender Owners	9	14%
Industry Organization Reps.	8	*
<b>Total</b>	<b>1,569</b>	<b>50%</b>

# Demographics



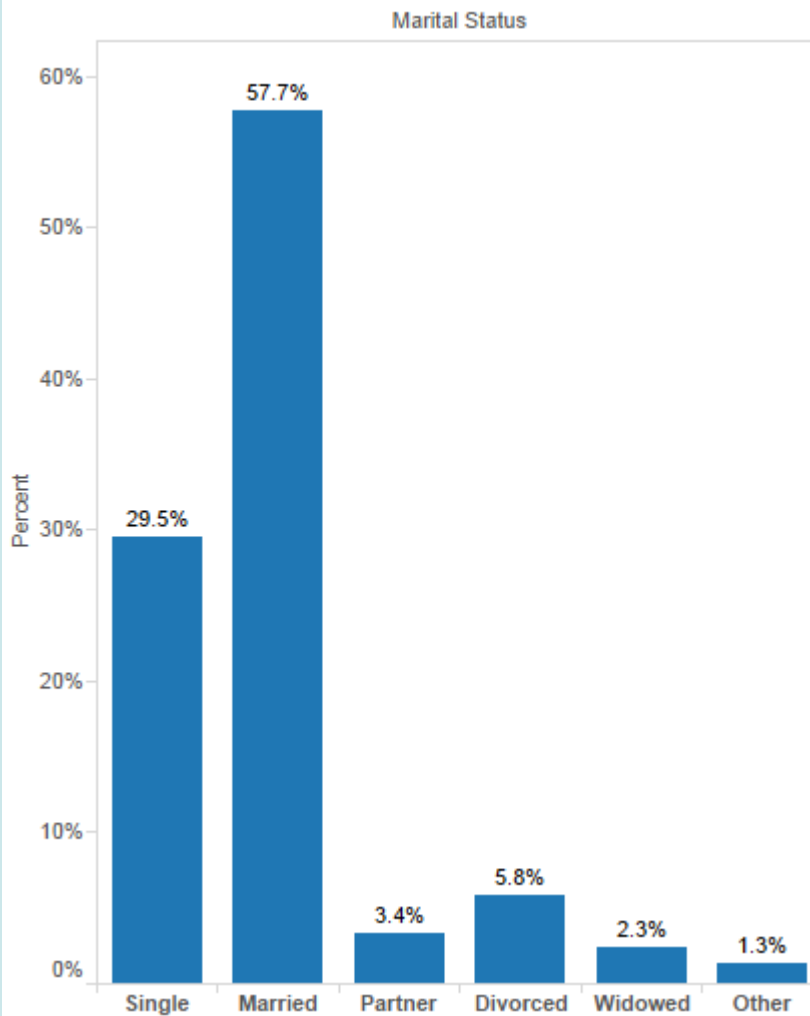
## Respondents

CV Owners  
CV Skippers/Crew  
Plant managers  
Plant workers  
Support business  
Ind. org. rep.

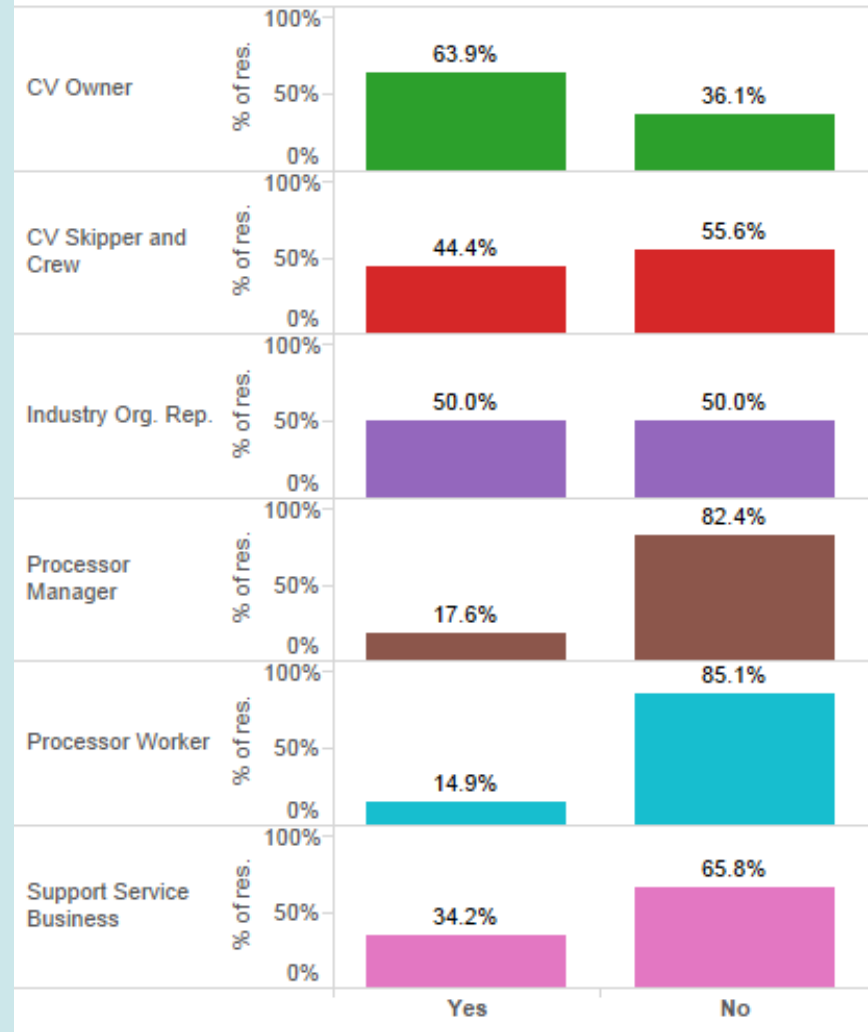
- Informs management issues such as:
  - Analysis of management alternatives
    1. Assess potential harm to one community, sector or ethnicity over another
    2. Add community context to economic analyses
  - What factors affect new entry, active participation, and retirement in fishery?
- Questions
  - Gender
  - Age
  - Race/ethnicity
  - Marital status and spouse participation
  - Share of income from fishing or processing
  - Family dependence on fishing

# Marital Status and Participation

**Marital Status, Total Survey Population**



**Spousal Activity**







# Individual Participation and Experience

## Respondents

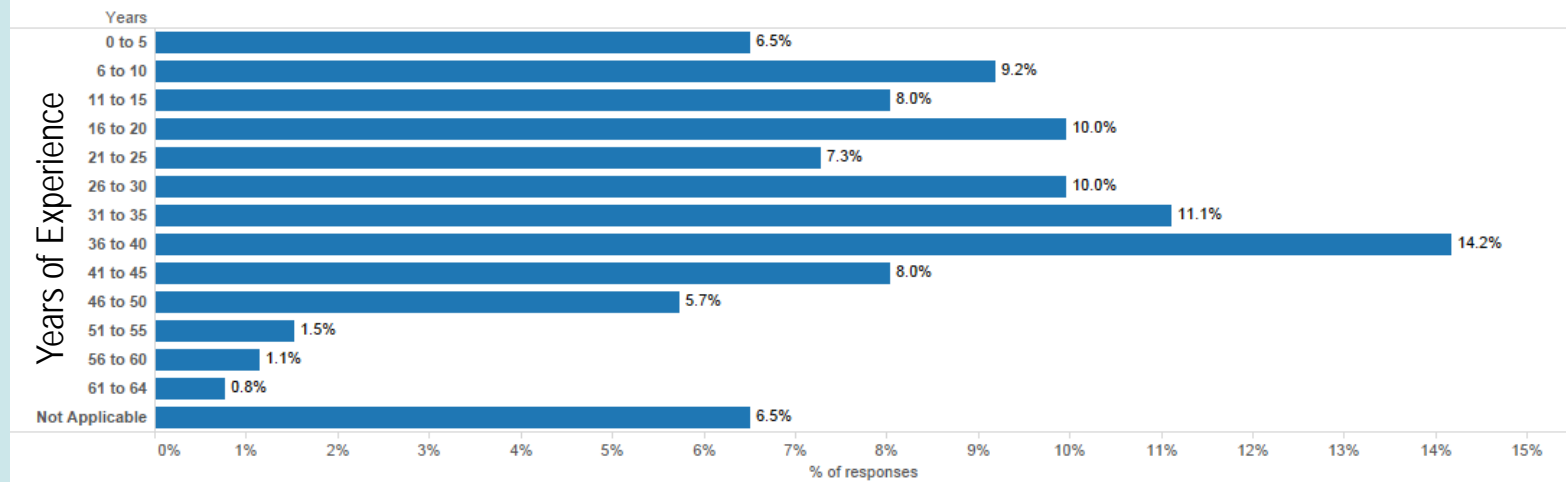
CV Owners  
CV Skippers/Crew  
Plant managers  
Plant workers  
Support business  
Ind. org. rep.

- Informs management issues such as:
  1. What are the effects of the new program on participants' employment profiles and reliance on the fishery?
  2. What factors may affect new entry, active participation, and retirement in fishery?
- Questions
  - Participant and their family's role in commercial fishing and historical participation
  - Experience in this and other fisheries
  - Employment inside and outside industry
  - Percentage of income derived from industry
  - Satisfaction with job overall, compensation, job stability, standard of living, co-workers, and management

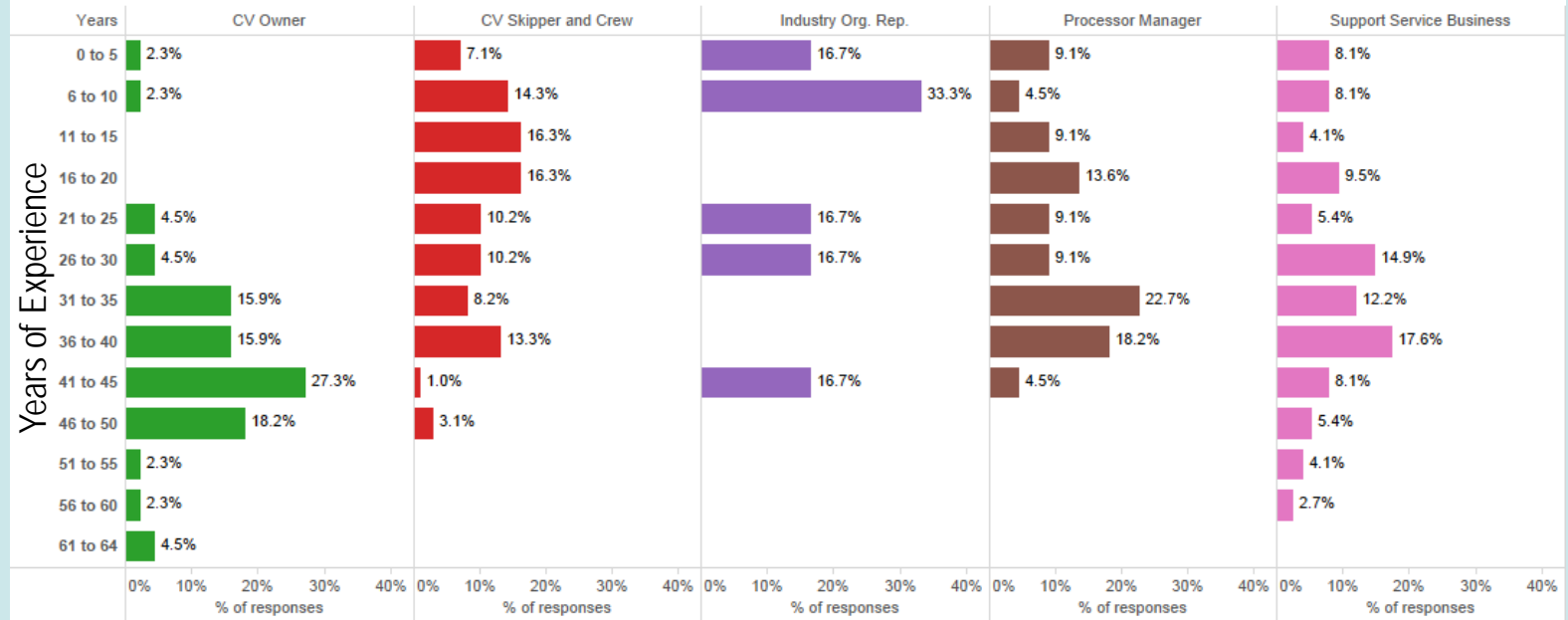
# How many years have you participated in commercial fishing or processing activities?

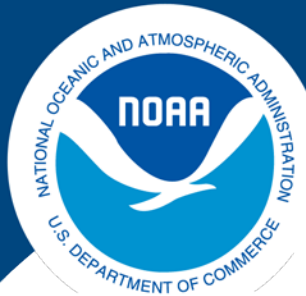
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October 9, 2014

## All Respondents



## By Sector





# Connections

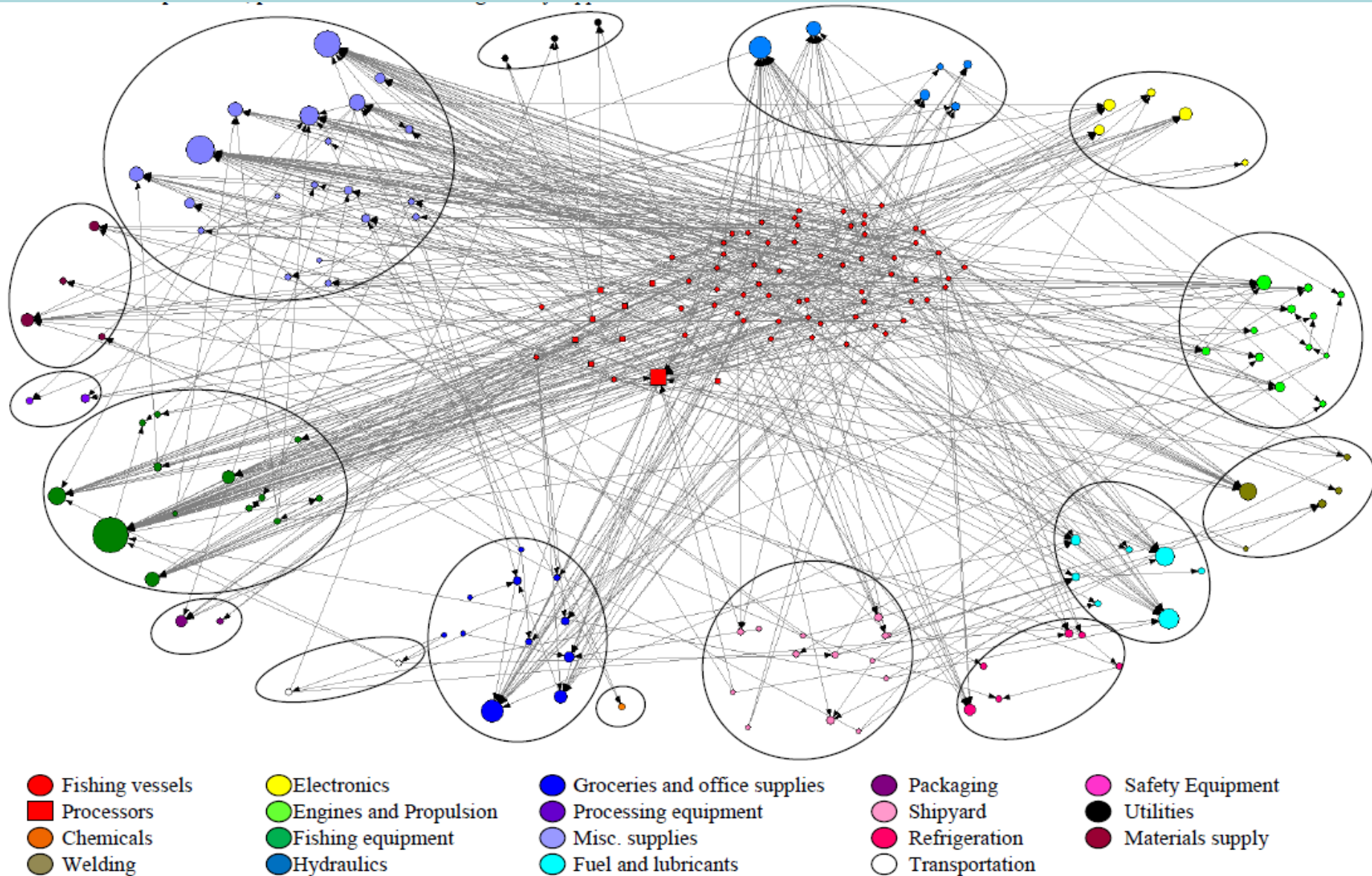
- Informs management issues such as:
  1. What are the links between fishermen and support service businesses by community?
  2. In what ways may support service sectors tied to GOA trawl fishery be affected by management changes?
- Questions
  - Companies that the participant depends on for equipment, supplies, services, and information
  - How this information is gathered

## Respondents

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CV Skippers/Crew  
Plant managers  
Plant workers  
Support business  
Ind. org. rep.

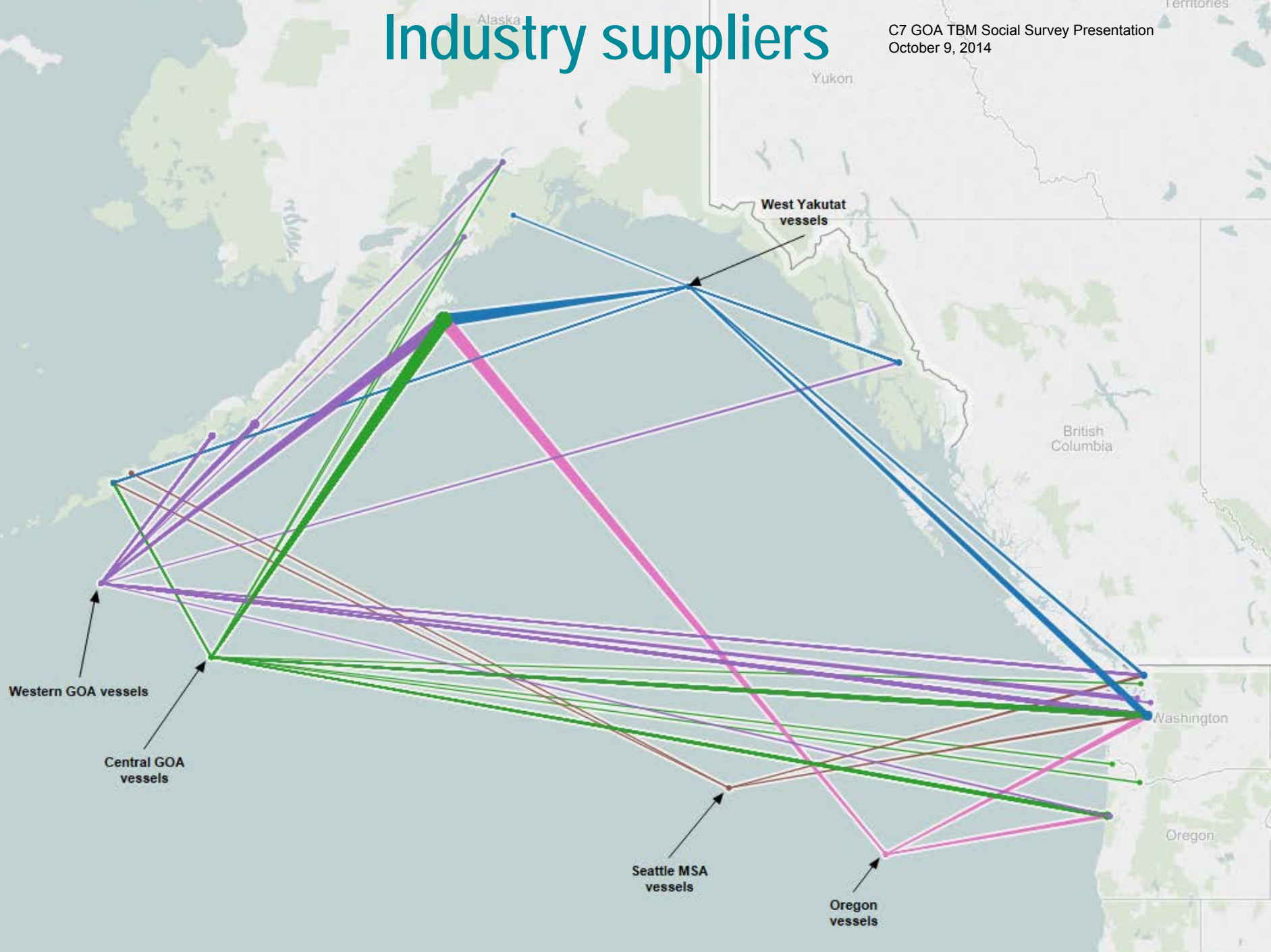
# Industry suppliers

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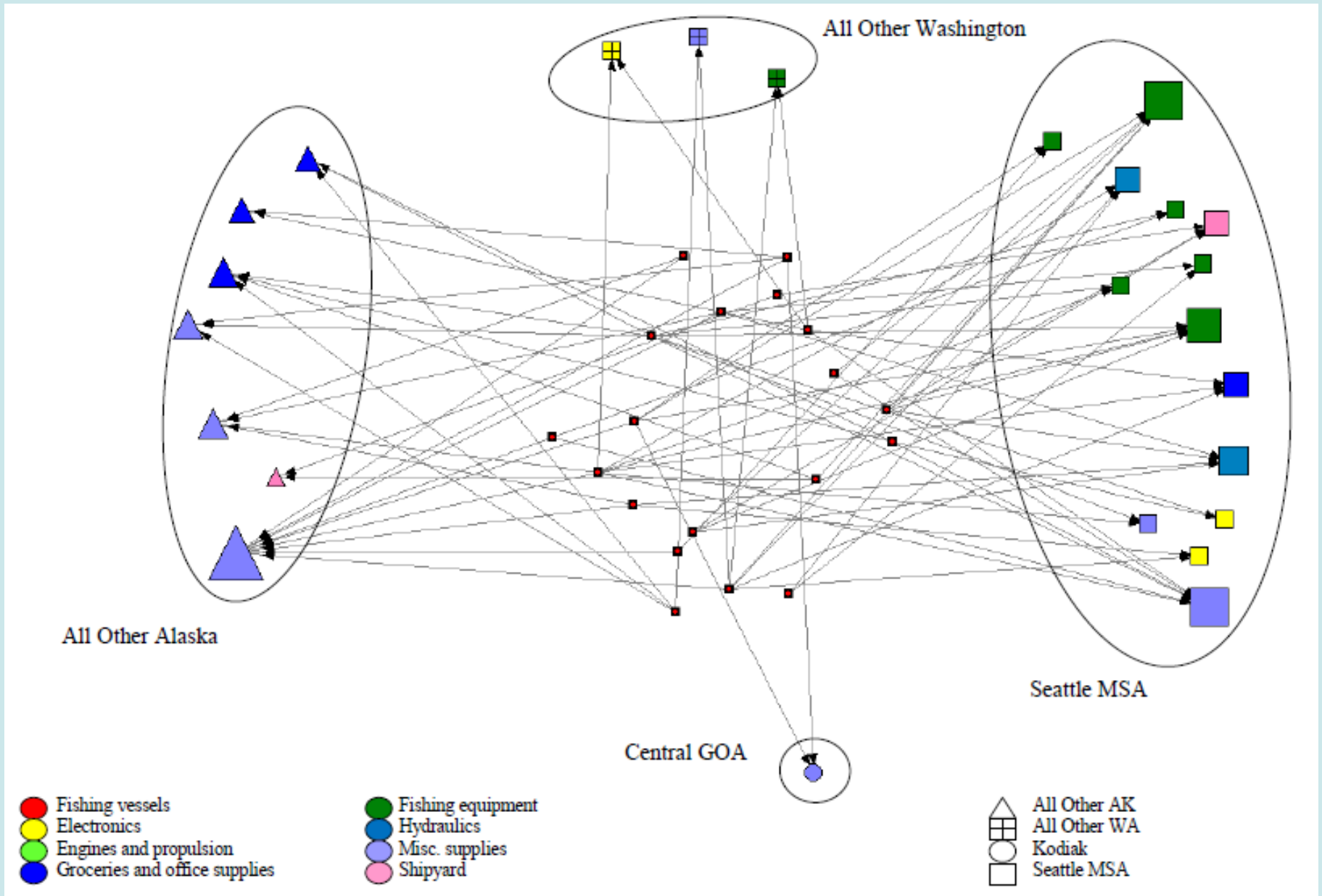


# Industry suppliers

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# Western GOA-based vessels: equipment and suppliers





# Trawl Bycatch Management Perspectives

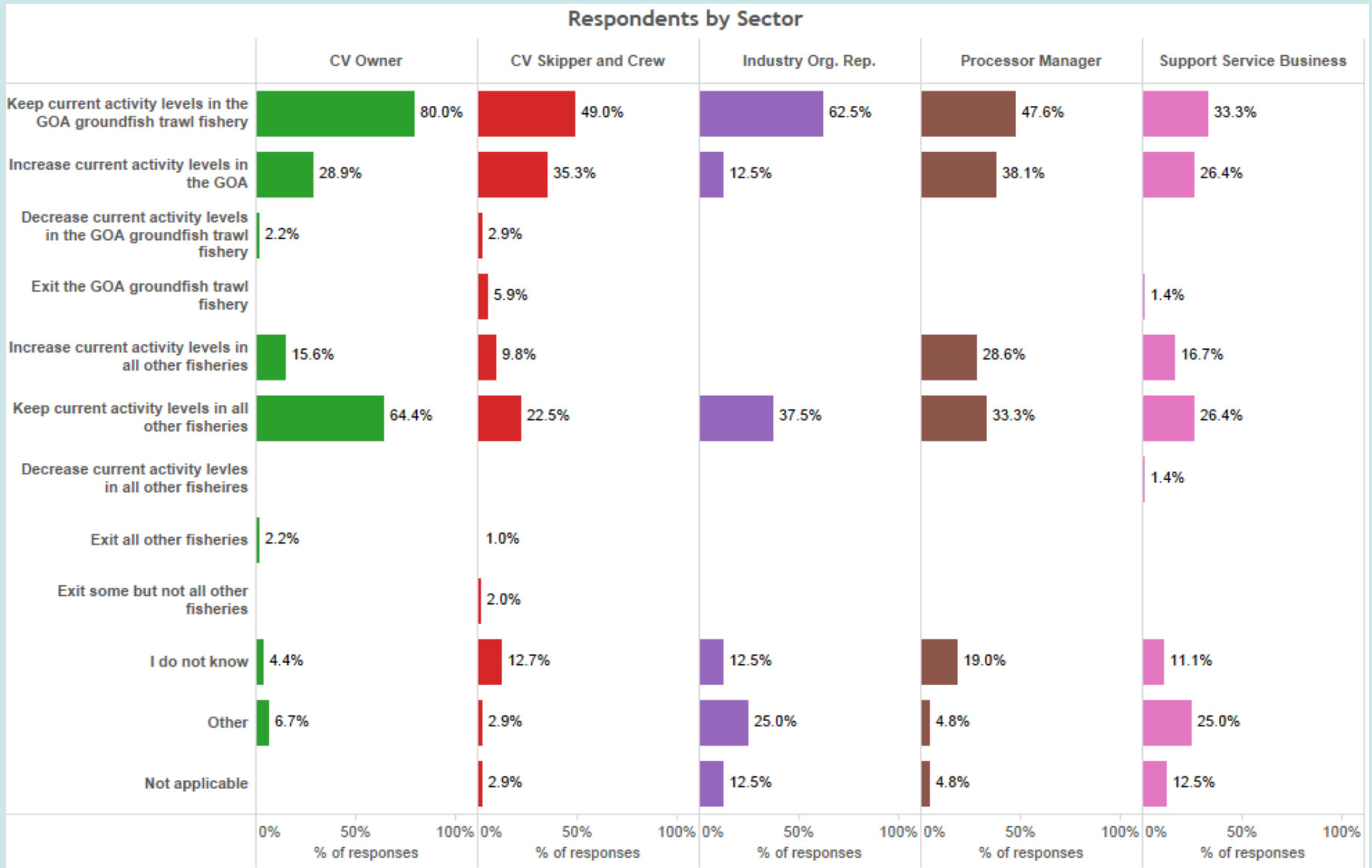
## Respondents

CV Owners  
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Plant managers  
Plant workers  
Support business  
Ind. org. rep.

- Informs management issues such as:
  - What are participant's ideas and opinions about the potential structure of the management program?
  - How do these ideas and opinions change after program implementation?
  - To what degree are various sectors involved or engaged in the management process?
- Questions
  - Participants' involvement in the Council process
  - Expectations of future changes in the fishery
  - Support for a catch share element and to whom the privilege should be allocated
  - Preferences for other program elements

# Plans for the next 5 years

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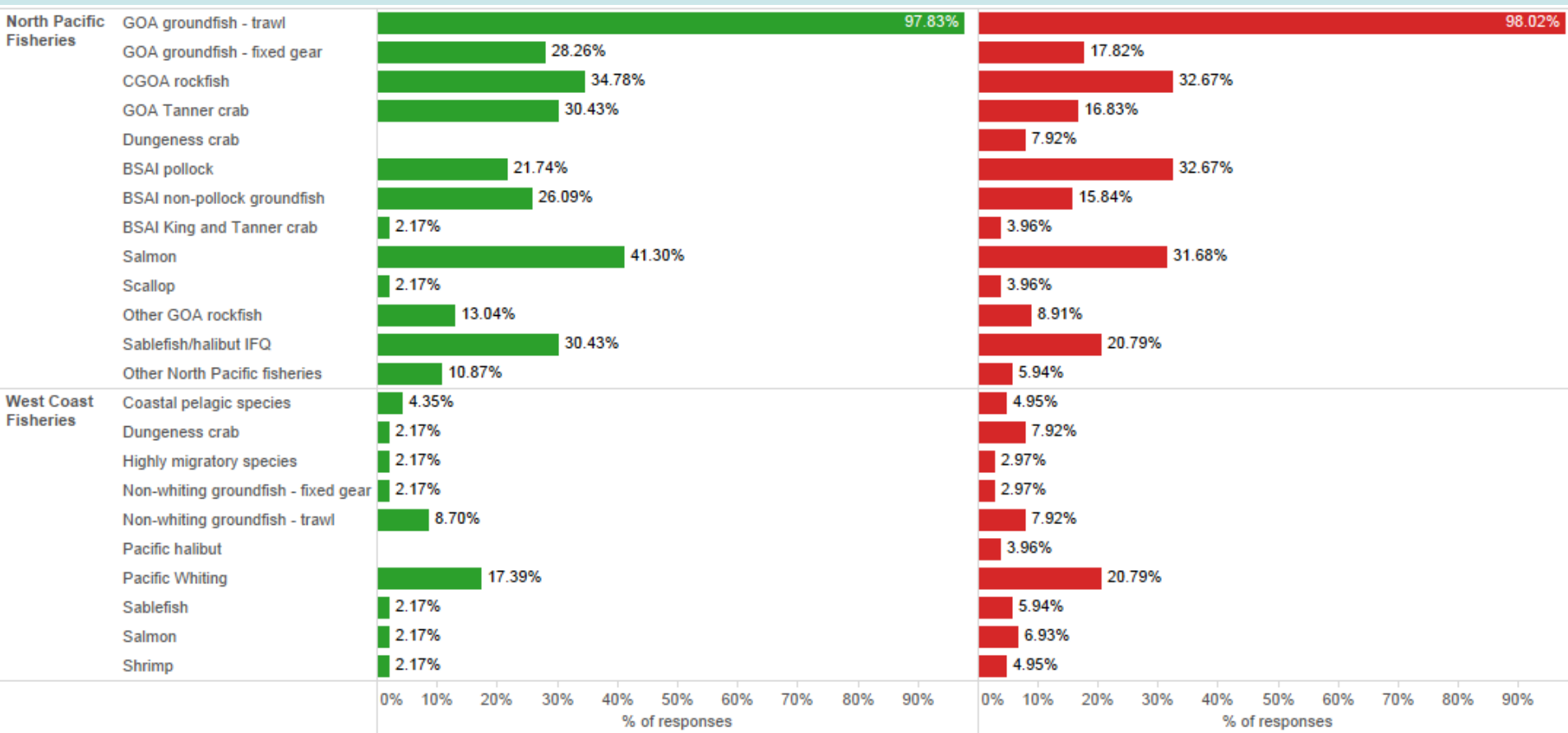
# Fishermen Questions

## Respondents

CV Owners  
CV Skippers/Crew  
Plant managers  
Plant workers  
Support business  
Ind. org. rep.

- Informs management issues such as:
  1. What is the overlap in participation between GOA trawl and other fisheries and how might effort shift after implementation?
  2. What factors influence relationships and affect business relationships of harvesters and processors?
- Questions
  - Fishing experience
  - Species importance
  - Future plans to expand or curtail fishing effort
  - Relationships to and with others on vessel
  - Factors influencing where the fish are sold

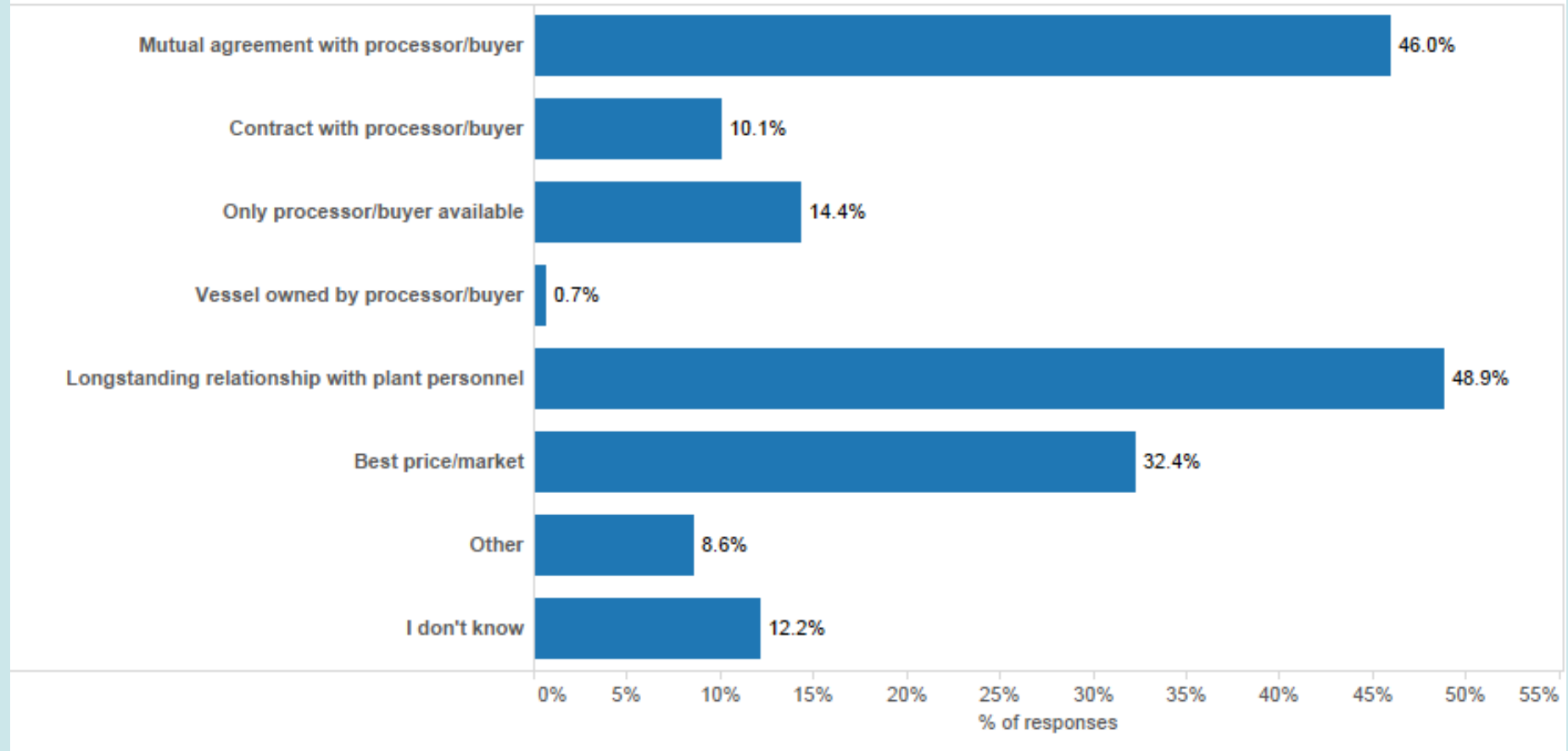
# What fisheries do you participate in?

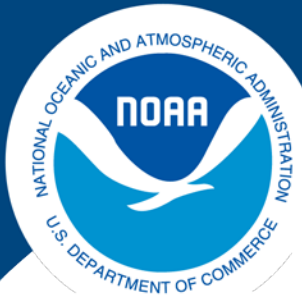


■ CV Owners  
■ CV Skippers and crew

# What influences where you sell the catch?

## All respondents





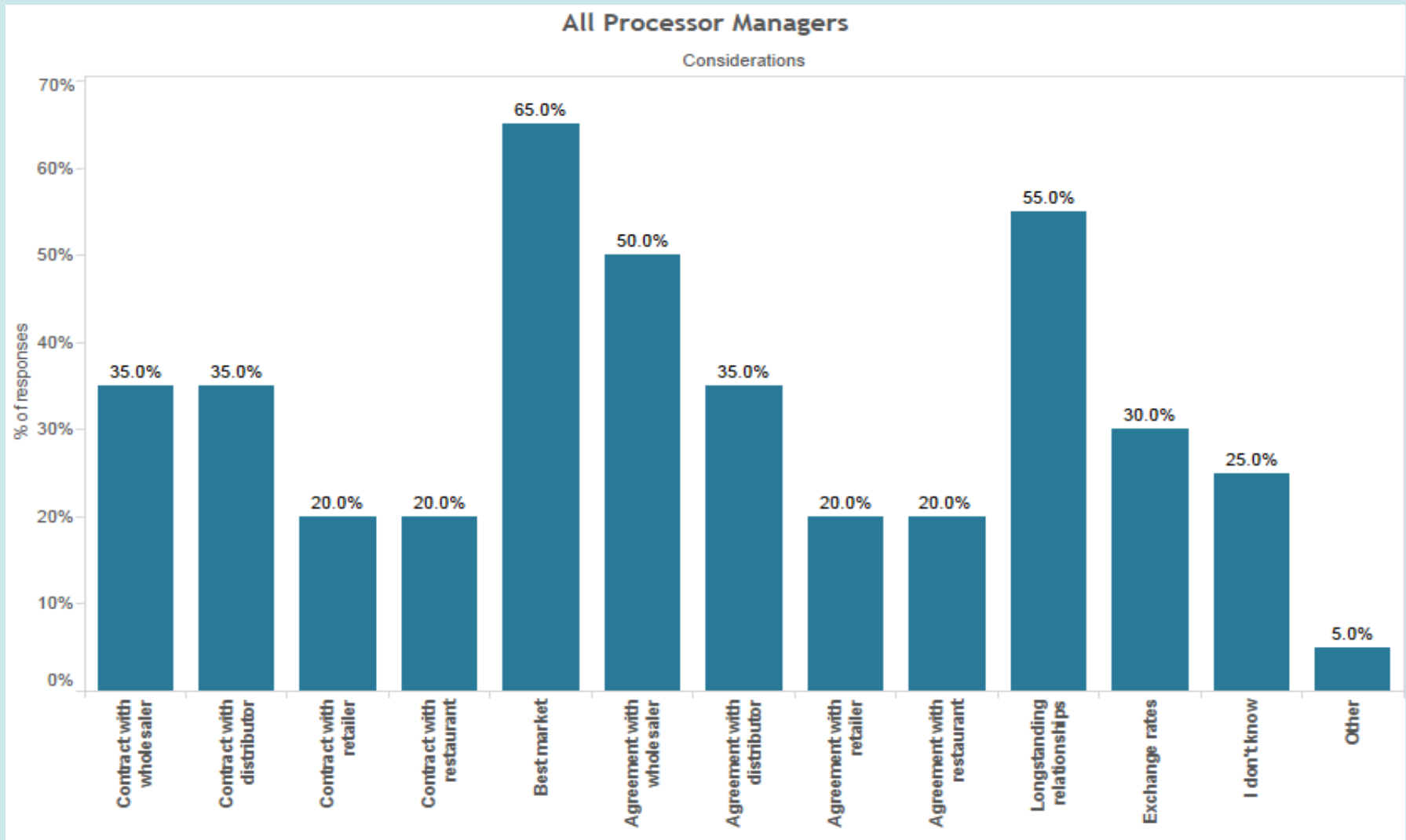
# Processing Manager Questions

## Respondents

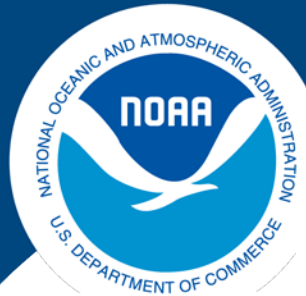
CV Owners  
CV Skippers/Crew  
Plant managers  
Plant workers  
Support business  
Ind. org. rep.

- Informs management issues such as:
  1. What factors influence why certain species are processed, and how might changes in these factors affect business?
  2. What factors drive relationships among harvesters, processors and wholesalers, and how might changes in these factors affect relationships?
- Questions
  - Species importance and why
  - Quality of relationships with vessels, suppliers, and plant workers
  - Factors influencing where fish are sold
  - Supply chain information

# What influences where to sell GOA trawl-caught groundfish?



# Processing Worker Questions



## Respondents

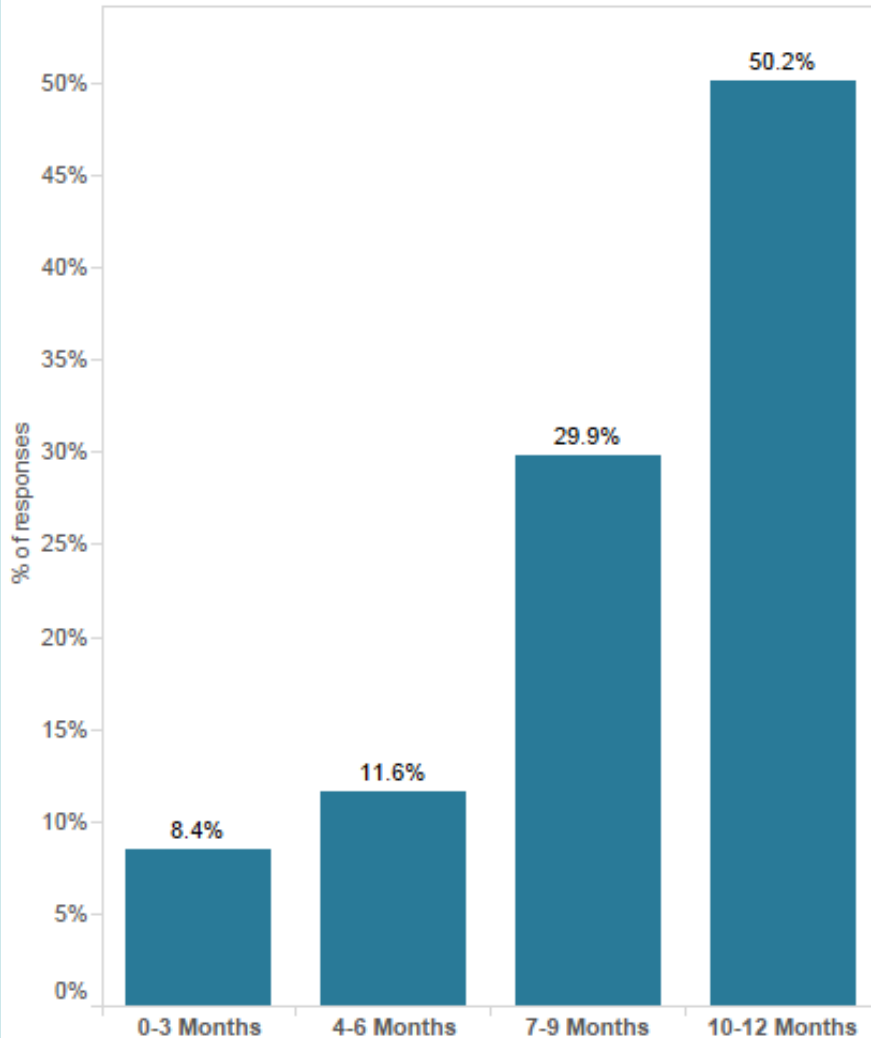
CV Owners  
CV Skippers/Crew  
Plant managers  
Plant workers  
Support business  
Ind. org. rep.

- Informs management issues such as:
  1. Are certain populations more susceptible to impacts from management changes?
  2. Do such impacts differ among residents and transient laborers?
- Questions
  - Citizenship, residence, foreign worker status
  - Residence of family and whether the family receives social assistance
  - Experience in the industry
  - Employment procurement
  - Outside employment and other options
  - Where do processing wages go?

# How many months per year do you work as a processing employee?

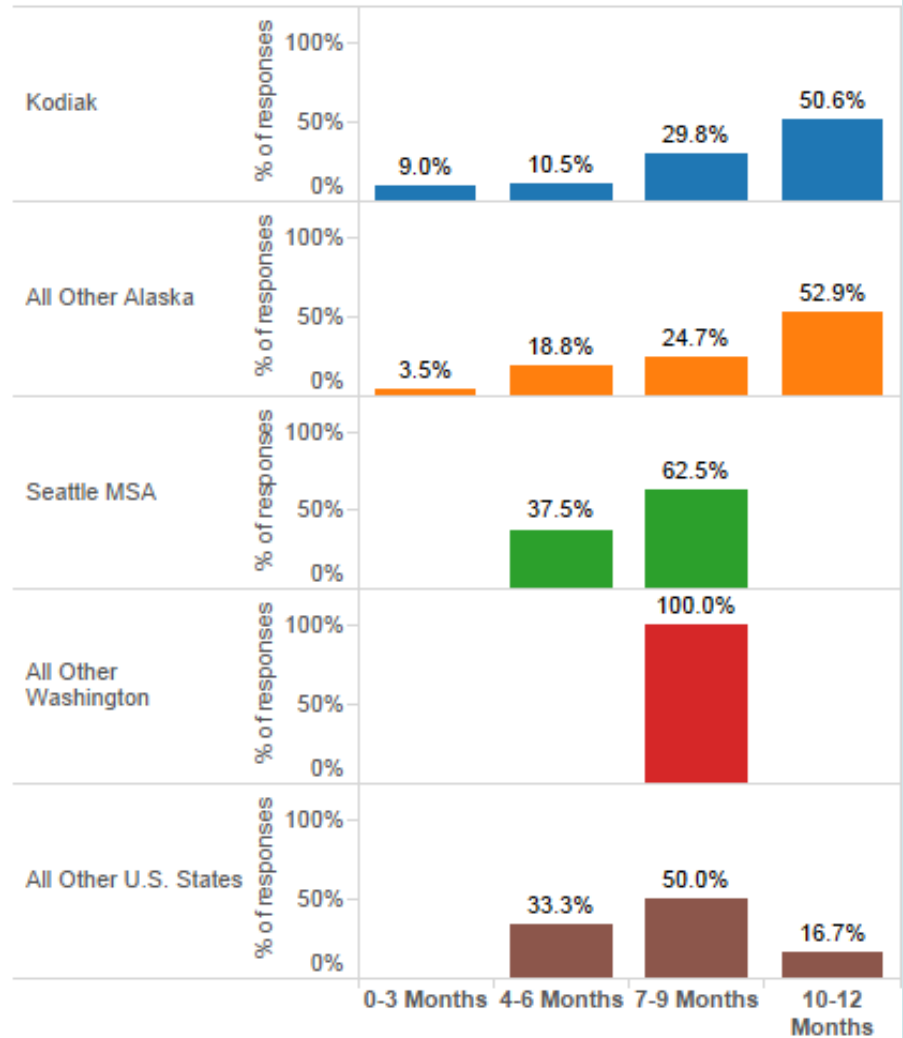
### All Processing Workers

Processing Months per Year



### By Geographical Location

Processing Months per Year





# Primary Findings from Baseline Data

- Many vessels and inshore processing plants also participate in other fisheries
- Processing workers in Alaska are mainly permanent residents
- CV owners have many years of experience
- Many spouses are also involved
- The majority of respondents only have one job and are therefore very tied to fishing
- Prices aren't the only factor influencing product sales decisions





# Next Steps

- Request for guidance on additional analyses
- Create new survey instruments for the C/P sector (Planned implementation mid-2015)
- Assist in the development of the Social Impact Assessment
- Implement 2<sup>nd</sup> baseline in 2016 (if possible)
- Survey again 2 years after program implementation

