

North Pacific Catcher-Processor Social Survey

>> Company Managers <<



Photo Credit: Keeley Kent

Sponsored by:

***NOAA Fisheries (National Marine Fisheries Service)
Alaska Fisheries Science Center
Economics and Social Science Research Program***

Questions?

Please Contact Amber Himes-Cornell, AFSC Social Scientist
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OMB Control No.: XXXX-xxxx

EXPIRATION DATE: XX/XX/20XX

This survey is voluntary.

ALL RESPONSES ARE CONFIDENTIAL

SURVEY INFORMATION

WHAT IS THE PURPOSE OF THE STUDY? This study aims to collect social and cultural information catcher processor companies and their employees participating in the Gulf of Alaska (GOA) Groundfish Trawl Fishery. The study will collect baseline data in 2015 to generate a description of people in the sector before the approval and implementation of a substantial change in the management of the GOA Groundfish Trawl Fishery. After implementation we will repeat the study at various intervals. We can then compare the results from each study to update the baseline data on the industry, and better understand any changes or social impacts that have occurred in the industry. In addition to this survey, the North Pacific Fishery Management Council is expected to collect economic data about the fishery through an economic data collection program.

WHO IS CONDUCTING THIS STUDY? This study is being conducted by the Economics and Social Science Research Program (ESSRP) at the Alaska Fisheries Science Center (AFSC), National Marine Fisheries Service (NMFS), National Oceanic and Atmospheric Administration (NOAA). The primary mission of the ESSRP is to provide economic and socio-cultural information that will assist NMFS in meeting its stewardship responsibilities. This means we study human society as it relates to marine resources, inclusive of commercial fishing.

HOW IS THIS STUDY FUNDED? This project is funded by the NMFS.

HOW WILL THIS STUDY BE USED? The information collected in this study will be used to understand the impacts of fishery management measures, and to inform fishery management in the future. The aggregated results of the survey will be publically available, but individual survey responses are confidential. It will also improve the NMFS' ability to analyze the impacts of fishery management actions on fishing communities, consistent with Magnuson-Stevens Fishery Conservation Act National Standard 8 and Executive Order 12898 – the Environmental Justice Initiative.

HOW IS THIS SURVEY ORGANIZED? This survey is one of three that have been created for the catcher processor sector. Each survey is aimed at a specific type of respondent: company management, shipboard management and deck crew, and processing line workers. This survey is aimed at representatives of each catcher processor company. There are four sets of questions; each set is likely best answered by someone familiar with certain aspects of company operations: the global company standpoint, human resources, sales and marketing and fleet management.

WHO DOES THIS STUDY INCLUDE? This study includes the employees of catcher processor vessels that fish in the GOA Groundfish Trawl fishery and individuals at the management level of each company.

HOW LONG WILL IT TAKE? This survey takes most people an hour to complete.

ARE MY ANSWERS CONFIDENTIAL? This is a confidential survey. If you have placed your survey in a locked box, only NOAA researchers will have a key to access the box. Your survey cannot be accessed by anyone on the boat. Analysis of the survey results will be anonymous. All of the information will be aggregated as well. Information in this survey will be subject to the confidentiality requirements of the National Marine Fisheries Service per MSA Sec. 402(b) and the NOAA Administrative Order NAO 216-100, and will not be provided or presented in any way as to identify individual respondents. Please see next page for more information.

DO I HAVE TO PARTICIPATE? Your participation and input is **VERY** important and will help us to better understand the unique opportunities and challenges of this fishery and its impact on the catcher processor sector. However, this is a **voluntary** survey and you may choose to skip any question or end at any point in the survey.

HOW WAS MY NAME OBTAINED? Depending on your role with the catcher processor, your name was obtained through ownership of a vessel, websites, through your employer, or through third party referrals.

Thank you for your participation!

Please contact Amber Himes-Cornell, AFSC Social Scientist for more information.

Contact information: amber.himes@noaa.gov, or by phone: (206) 526-4221

Filled out by survey administrator

Code number: _____ Name of survey administrator: _____
 Survey Location: _____ Date: _____
 Notes: _____

SURVEY INSTRUCTIONS

All answers given in this survey should reflect *YOUR OWN* perception of the commercial fishing industry based on your personal experience and knowledge.

- Please ask questions at any time. Feel free to ask the researcher who is working with you or contact Amber Himes-Cornell at amber.himes@noaa.gov or (206) 526-4221.
- Please follow directions carefully.
- Please **DO NOT** write your name anywhere on this survey, only on the blue form provided.
- Please mark one answer per question unless otherwise specified. Please write clearly.
- If you are unable to answer the question or it does not apply to you, please make sure to select the 'do not know' or 'NOT APPLICABLE' box from the options provided.
- If you chose to **not** answer a question for any reason, please write a notation next to the question in the margin if an appropriate option (ex. NOT APPLICABLE) is not provided in the question.
- Please mark boxes clearly.



In electronic survey versions, check boxes can be selected and unselected with a click of the mouse.



If you mark an answer incorrectly, please draw a horizontal line through the incorrect answer and check the correct answer.

THANK YOU FOR YOUR TIME AND PARTICIPATION

EXPLANATION OF CONFIDENTIALITY

The information you provide will be kept confidential to the extent possible per the Magnuson-Stevens Fishery Conservation and Management Act (as amended) Sec 402(b) and NOAA Administrative Order NAO 216-100, Protection of Confidential Fisheries Statistics. In addition, in the event of a Freedom of Information Act (FOIA) request, we will protect the confidentiality to the extent possible under the Exemption 4 of the FOIA. To support the confidentiality of this research the following processes are in place:

- Your name will not be included on the survey document. It will be tracked in an alternate document to reduce duplication, to account for your participation in the survey, and code your name as needed for the data analysis. Access to this document will be limited to researchers working on this study and protected via confidentiality agreements.
- All personal names provided on the survey document as answers to questions, will be viewed only by the study researchers. The names will either be coded with a descriptor such as 'X Community Fisherman' or assigned a code such as 'A1' as an identifier. The type of code that will be applied to the data for each applicable question may vary based on the question itself or the associated analysis of question.
- As researchers write final reports and publish the findings of this research, your responses will be combined with responses from other participants so that no single individual may be identified.

SECTION 1. FROM THE GLOBAL COMPANY STANDPOINT

1.2. How do you participate in the North Pacific Fishery Management Council process?

Please mark all that apply.

- | | |
|---|--|
| <input type="checkbox"/> Attend Council meetings in person
<input type="checkbox"/> Listen to Council meetings via the web
<input type="checkbox"/> Provide written public testimony
<input type="checkbox"/> Provide oral public testimony
<input type="checkbox"/> Provide written comments | <input type="checkbox"/> Read the Council's newsletter
<input type="checkbox"/> I do not participate in the Council process at all.
<input type="checkbox"/> Other (Please specify): _____ |
|---|--|

3. Please describe the role Gulf of Alaska fisheries currently play in the overall company portfolio.

4. Please describe the role Gulf of Alaska fisheries played in the company portfolio 20 years ago. *If your company did not exist 20 years ago, please select "Not Applicable".*

- Not applicable

5. Hypothetically, if your vessels could not operate in the Gulf of Alaska anymore, how would your company respond? *Please mark all that apply.*

- Pursue more Bering Sea Fisheries
- Pursue other fisheries outside of Alaska
- Consolidate operations onto fewer vessels
- Operate vessels seasonally instead of year-round
- No change outside of the Gulf of Alaska

6. Please describe the role Bering Sea and Aleutian Islands fisheries currently play in the overall company portfolio.

7. Please describe the role Bering Sea and Aleutian Islands fisheries played in the company portfolio 20 years ago.

8. Please indicate which fisheries you plan to continue, stop or begin participating in over the next 5 years. BSAI: Bering Sea/Aleutian Island, GOA: Gulf of Alaska.

North Pacific Fisheries	Plan to CONTINUE over next 5 years	Plan to STOP over next 5 years	Plan to BEGIN in next 5 years	We do not participate in this fishery
Central GOA groundfish	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Western GOA groundfish	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Central GOA rockfish program	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BSAI non-pollock groundfish	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other fishery (Please specify):	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other fishery (Please specify):	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

9. Please indicate how important each of the fisheries below is to your company. BSAI: Bering Sea/Aleutian Island, GOA: Gulf of Alaska.

North Pacific Fisheries	Not at all important	Somewhat important	Neutral	Moderately important	Extremely important
Central GOA groundfish	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Western GOA groundfish	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Central GOA rockfish program	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BSAI non-pollock groundfish	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other fishery (Please specify):	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other fishery (Please specify):	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

10. How much do exchange rates affect your business operations?

- Not at all
- Somewhat
- Moderately
- A lot



Please answer question 9a.

9a. If you answered somewhat to a lot in the previous question: Please explain how your business handles fluctuating exchange rates.

- We do not change our business practices in response to fluctuating exchange rates.

SECTION 2. HUMAN RESOURCES

11. How many total people work for this company (do not include subsidiaries or parent companies)?

Number of people:

12. How are the company’s employees typically paid?

	Office staff	Skippers/First mates	Engineers	Fishing crew	Factory managers	Processing crew	Other crew
By day	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
By days at sea	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hourly	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Salary	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Owner share	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
By pound of catch	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
By pound of processed product	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
By percentage of value of catch	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
By percentage of value of processed product	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (Please specify):	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

13. How do you find new employees for your vessels? Please mark all that apply.

- We recruit through Alaska Job Centers
- We advertise in other countries
- We employ recruiters in Alaska
- We employ recruiters in other parts of the United States
- We employ recruiters in other countries
- We use online recruitment
- Word of mouth
- Connections (relatives?) of current employees
- Other (Please specify): _____

14. In an average year, what percentage of your vessel-based employees are returning after having worked for your company in the previous year?”

%

SECTION 3. SALES AND MARKETING

15. How do you get information related to how to price your products? Please select all that apply.

- From buyers
- From industry newsletter
- From fishing organizations
- From the internet
- From Urner Barry
- From foreign publications (newspaper, government report, etc)
- Other (Please specify):

16. Where do you sell your products? Please select all that apply.

- United States
- Canada
- United Kingdom
- Continental Europe
- Russia
- China
- Japan
- Korea
- Other Asia
- Other (Please specify):

17. What items does your company take into consideration when deciding where to sell seafood product(s)? Please mark all that apply.

- | | |
|---|--|
| <input type="checkbox"/> Contract with wholesaler(s) | <input type="checkbox"/> Agreement with wholesaler(s) |
| <input type="checkbox"/> Contract with distributor(s) | <input type="checkbox"/> Agreement with distributor(s) |
| <input type="checkbox"/> Contract with restaurant(s) | <input type="checkbox"/> Agreement with restaurant(s) |
| <input type="checkbox"/> Contract with retailer(s) | <input type="checkbox"/> Agreement with retailer(s) |
| <input type="checkbox"/> Best markets | <input type="checkbox"/> Longstanding relationships |
| <input type="checkbox"/> I do not know | <input type="checkbox"/> Exchange rates |
| <input type="checkbox"/> Other (Please specify): | |
-

18. Where do you market your seafood product(s)?

Please mark all that apply and list locations. (For example: Seattle, WA).

- Local _____
- Regional _____
- National _____
- International _____
- I do not know _____

19. What other businesses do you depend on for the complete purchase, processing, and sale of your company's seafood product(s)?

For example: trucking company, broker, etc.

I do not know

20. To help us better understand what happens to your finished product after it leaves your vessel(s), please describe the most common path your seafood product(s) takes from purchase to final consumption. *For example:*

Vessel — Chinese re-processor — Japanese distributor — Final consumer market in Korea

I do not know

Section 4. Fleet management

21. Has your company changed the species it has targeted within the last 5 years?

- Yes ➔ Go to 38 No ➔ Go to 39

22. Why has your company changed the species you target?

- Not applicable

23. How does the company determine year to year which fisheries each vessel will participate in?

24. How do you obtain information related to your work in the fishery? Please select all that apply.

- | | |
|---|--|
| <input type="checkbox"/> Internet | <input type="checkbox"/> NMFS website |
| <input type="checkbox"/> Telephone/Cell phone | <input type="checkbox"/> Social networking Sites (Facebook, Twitter, etc.) |
| <input type="checkbox"/> Radio | <input type="checkbox"/> Print media (Newspaper, Magazines, Newsletters) |
| <input type="checkbox"/> Verbal/Word of mouth | <input type="checkbox"/> Fishing organizations |
| <input type="checkbox"/> Email | <input type="checkbox"/> Other (Please specify): |
| <input type="checkbox"/> ADF&G website | |

25. Who do you depend on for equipment and supplies you utilize for your catcher processor vessel(s)? Please include the name of the organization, the type of equipment or supply provided and where the service is located. Please list the first 5 that come to mind. Personal names will be coded to protect identity, see page ii.

For example: net suppliers, fuel, bait, vessel parts, etc.

Name/Business	Type of Equipment or Supply	City/Town/Harbor

Not applicable

26. Who do you depend on for services you utilize for your catcher processor vessel(s)? Please include the name of the organization, the type of service and where the service is located. Please list the first 5 that come to mind.

For example shipyards, equipment repairs, financial advice, accounting, legal, etc.

Name/Business	Type of Service	City/Town/Harbor

Not applicable

27. Who do you depend on for information about fisheries management? Please list the role or occupation of people and associated companies and/or organizations. Please list the first 5 that come to mind.

For example: changes in regulations, fishery, area, or gear closures, observer requirements, etc.

Role/Occupation	Type of Information	City/Town/Harbor

Not applicable

28. Who do you depend on for other everyday information to assist you in your work in the

commercial fishing and/or processing industries? Please list the role or occupation of people and associated companies and/or organizations that provide the information. Please list the first 5 that come to mind. Personal names will be coded to protect identity, see page ii.

For example: Skippers give me information on fishing operations. Factory managers provide inventory and production information. Sales department informs me what our buyers are willing to pay. An industry research group provides me with information about new excluder devices that others are testing.

Role/Occupation	Type of Information	City/Town/Harbor

Not applicable

The following space is left blank for notes or comments

THANK YOU FOR YOUR PARTICIPATION

Please address any questions or comments to:

Amber Himes-Cornell
 7600 Sand Point Way NE
 Seattle, WA 98115
 amber.himes@noaa.gov
 (206) 526-4221

*Public reporting or burden for this survey is estimated to average 1 hour per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Notwithstanding any other provision of the law, no person is required to respond to, nor shall any person be subject to a penalty for failure to comply with, a collection of information subject to the requirements of the Paperwork Reduction Act, unless that collection of information displays a currently valid OMB Control Number. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to **Amber Himes-Cornell, AFSC-Economics and Social Science Research Program, 7600 Sand Point Way NE, 98115.***