



National Marine Fisheries Service

Economic Survey of Gulf of Mexico Dealers Associated With the Gulf of Mexico Grouper-Tilefish Individual Fishing Quota Program



PAPERWORK REDUCTION ACT STATEMENT:

Public reporting burden for this collection of information is estimated to average 1 hour per response including the time for reviewing the instructions, searching the existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspects of this burden to Larry Perruso National Marine Fisheries Service, 75 Virginia Beach Drive, Miami, Florida 33149. This reporting is authorized under 50 CFR 622.5(a)(1)(v). This survey is voluntary. Individual responses will not be released by NMFS. Personal information will not be disclosed, and will only be accessible to authorized personnel responsible for management and research of fisheries under the authority of NOAA. NMFS will retain control over the information and safeguard it from improper access, modification, and destruction, consistent with NOAA standards for privacy and electronic 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 displays a currently valid OMB Control Number. The NMFS requires this information for the conservation and management of marine fishery resources. These data will be used to evaluate the economic effects of proposed regulations in the fishery.

The business at this address has been identified as a Gulf of Mexico grouper/tilefish dealer. This survey has been developed to evaluate the impacts of the grouper/tilefish IFQ (GT-IFQ) program on those Gulf of Mexico businesses whose activities involve the buying, processing and selling of grouper and tilefish. **This survey is voluntary. QuanTech, the contractor conducting the study, will only share the survey data with NMFS. Only aggregate data will be released by NMFS to protect your personal and business identifying information. No data that could identify you or your business will be released.**

Section 1: Background Information

1. What year did this business at this address start handling seafood under current ownership?

2. What do you consider to be the PRIMARY activity of this business? **(CHECK ONLY ONE)**

- Commercial fishing (operating commercial fishing vessels to harvest seafood)
- Dealer / distributor activities (buying and reselling seafood)
- Processor activities (transforming seafood into new products and reselling the products)
- Retailer activities (selling seafood products directly to the consumer)
- Other (Specify):

3. What was your opinion of the GT-IFQ program at the time of its implementation on January 1, 2010?

Strongly Opposed	Opposed	Neutral	Supported	Strongly Supported	No Opinion
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. What is your opinion of the GT-IFQ program NOW?

Strongly Oppose	Oppose	Neutral	Support	Strongly Support	No Opinion
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. Have your arrangements with fishermen from whom you purchased grouper/tilefish changed significantly as a result of the GT-IFQ program?

- Yes
- No → GO TO # 6
- NA - I was not a dealer/processor prior to implementation of the GT-IFQ program. → GO TO # 6

5(a). What were the primary changes in your arrangements with fishermen from whom you purchased grouper/tilefish?

Section 2: Pre- and Post-GT-IFQ Operations

This section of the survey asks for information specific to your operations pre- and post-implementation of the GT-IFQ program. **PLEASE COMPLETE THE POST-IFQ PORTION OF THE QUESTIONS in this section of the questionnaire even if you did not buy, process or sell grouper/tilefish prior to implementation of the program. In such cases, write “NA” for 2009 Pre-GT-IFQ data.** Furthermore, we realize that you may not have access to 2009 records. Please give your ‘best estimate’ of 2009 activities (i.e., pre-GT-IFQ) if the information is not readily available.

6. For this seafood business, what were the estimated GROSS SALES for **grouper/tilefish** pre- and post-GT-IFQ implementation? **Individual responses will not be released by NMFS.**

2009 Pre-GT-IFQ: \$

2014 Post-GT-IFQ: \$

- 6(a). Did the implementation of the GT-IFQ program contribute to the change in **grouper/tilefish** GROSS SALES reported in Question 6? If you wrote “NA” for 2009 above or there was no change in GROSS SALES for **grouper/tilefish** pre- vs. post-GT-IFQ, go to Question 7.

Yes
 No
 No Opinion
 } → GO TO # 7

- 6(b). Please explain why you believe the GT-IFQ program contributed to the change in **grouper/tilefish** GROSS SALES.

7. For this seafood business, what were the estimated GROSS SALES of **other finfish and shellfish species** pre- and post-GT-IFQ implementation?

2009 Pre-GT-IFQ: \$

2014 Post-GT-IFQ: \$

8. What percentage (%) of the **grouper/tilefish** purchased or obtained pre- and post-GT-IFQ by this seafood business, by weight, came from the following sources?

Sources of Grouper/Tilefish for This Business

Source	Pre-GT-IFQ (2009)	Post-GT-IFQ (2014)
U.S. based fishermen who operate vessels owned by this business (including yourself)	%	%
U.S. based fishermen who operate vessels not owned by this business	%	%
U.S. based seafood dealers/distributors/processors	%	%
Outside the U.S.	%	%
Other (Specify): _____	%	%
TOTAL	100%	100%

Note: Total for each year should sum to 100%.

8(a). Did the GT-IFQ program contribute to the change in **grouper/tilefish** SOURCES reported in Question 8?

- Yes
 - No
 - No Opinion
 - No Change
 - NA
- } → GO TO # 9

8(b). Please explain why you believe the GT-IFQ program contributed to the change in **grouper/tilefish** SOURCES.

9. Approximately how many people were employed at this seafood business pre- and post-GT-IFQ? Please limit your response to only those employees directly involved in the dealer/processor component of this business (i.e., exclude hired captains and crew). If the owner works at this seafood business, please include him/her among the total number of workers.

Number of Employees at This Business

	Pre-GT-IFQ (2009)	Post-GT-IFQ (2014)
Full Time (≥40 hours per week)		
Part Time (<40 hours per week)		

9(a). Did the GT-IFQ program contribute to the change in EMPLOYMENT reported in Question 9? If there was no change in EMPLOYMENT, go to Question 10.

- Yes
 - No
 - No Opinion
 - NA
- } → GO TO # 10

9(b). Please explain why you believe the GT-IFQ program contributed to the change in EMPLOYMENT.

10. With respect to the **grouper/tilefish** component of this seafood business, please provide an estimate of the cost of the raw product (expressed on a finished-weight basis) and the final product sales price pre- and post-GT-IFQ implementation. Please write “NA” if the species shown is not purchased or sold. **Individual responses will not be released by NMFS.**

Gag

	Pre-GT-IFQ (2009)	Post-GT-IFQ (2014)
Raw Fish Cost (Finished Weight)	\$/lb.	\$/lb.
Sales Price	\$/lb.	\$/lb.

Red Grouper

	Pre-GT-IFQ (2009)	Post-GT-IFQ (2014)
Raw Fish Cost (Finished Weight)	\$/lb.	\$/lb.
Sales Price	\$/lb.	\$/lb.

Black Grouper

	Pre-GT-IFQ (2009)	Post-GT-IFQ (2014)
Raw Fish Cost (Finished Weight)	\$/lb.	\$/lb.
Sales Price	\$/lb.	\$/lb.

Scamp

	Pre-GT-IFQ (2009)	Post-GT-IFQ (2014)
Raw Fish Cost (Finished Weight)	\$/lb.	\$/lb.
Sales Price	\$/lb.	\$/lb.

Yellowedge Grouper

	Pre-GT-IFQ (2009)	Post-GT-IFQ (2014)
Raw Fish Cost (Finished Weight)	\$/lb.	\$/lb.
Sales Price	\$/lb.	\$/lb.

Golden Tilefish

	Pre-GT-IFQ (2009)	Post-GT-IFQ (2014)
Raw Fish Cost (Finished Weight)	\$/lb.	\$/lb.
Sales Price	\$/lb.	\$/lb.

Blueline Tilefish

	Pre-GT-IFQ (2009)	Post-GT-IFQ (2014)
Raw Fish Cost (Finished Weight)	\$/lb.	\$/lb.
Sales Price	\$/lb.	\$/lb.

10(a). Did the GT-IFQ program contribute to the change in RAW FISH COST reported in Question 10?

- Yes
 - No
 - No Opinion
 - No Change
 - NA
- } → GO TO # 10(c)

10(b). Please explain why you believe the GT-IFQ program contributed to the change in RAW FISH COST.

10(c). Did the GT-IFQ program contribute to the change in SALES PRICE reported in Question 10?

- Yes
 - No
 - No Opinion
 - No Change
 - NA
- } → GO TO # 11

10(d). Please explain why you believe the GT-IFQ program contributed to the change in SALES PRICE.

11. With respect to the **grouper/tilefish component** of your seafood business, please provide an estimate of sales, by product form, on a percentage basis (%) pre- and post-GT-IFQ.

Sales by Product Form

Type of Product	Pre-GT-IFQ (2009)	Post-GT-IFQ (2014)
Fresh whole or gutted fish	%	%
Frozen whole or gutted fish	%	%
Fresh fillets	%	%
Frozen fillets	%	%
Other (Specify): _____	%	%
TOTAL	100%	100%

Note: Total for each year should sum to 100%.

12. What percentage (%) of the **grouper/tilefish** sales by this seafood business pre- and post-GT IFQ went to the following outlets?

Sales to Various Outlets

Outlet	Pre-IFQ (2009)	Post-IFQ (2014)
Other dealers/processors	%	%
Wholesalers	%	%
Retailers	%	%
Restaurants	%	%
Consumers	%	%
Other outlets (Specify): _____	_____%	_____%
TOTAL	100%	100%

Note: Total for each year should sum to 100%.

Section 3: Pre- and Post-GT-IFQ Infrastructure and Equipment

13. Has this business, or you personally, ever owned any vessels used in the harvesting of **grouper/tilefish** in the Gulf of Mexico?

- Yes
 No → GO TO # 13(c)

- 13(a). Have you increased or decreased the number of vessels or size of vessels owned as a result of the GT-IFQ program?

- Yes, I have INCREASED the number of vessels or size of vessels owned.
 Yes, I have DECREASED the number of vessels or size of vessels owned.
 No, I have not INCREASED or DECREASED the number of vessels or size of vessels owned.

- 13(b). Do you have any plans to increase or decrease the number of vessels or size of vessels in the next 5 years as a result of the GT-IFQ program?

- Yes, I plan to INCREASE the number of vessels or size of vessels owned.
 Yes, I plan to DECREASE the number of vessels or size of vessels owned.
 No, I have no plans to INCREASE or DECREASE the number of vessels or size of vessels owned.
 Undecided

→ GO TO # 14

- 13(c). Do you have any plans to increase the number of vessels or size of vessels owned as a result of the GT-IFQ program?

- Yes
 No
 Undecided

14. Excluding vessels and GT-IFQ shares, have you made MAJOR INVESTMENTS or DISINVESTMENTS in this seafood business that you attribute to the implementation of the GT-IFQ program?

- Yes
- No → GO TO # 15

14(a). Please briefly describe what INVESTMENTS or DISINVESTMENTS attributed to the GT-IFQ program that you have made in this seafood business.

15. Excluding real estate, vessels and any GT-IFQ shares owned by the business, what would you estimate as the CURRENT MARKET VALUE of this seafood business?

\$

16. Has implementation of the GT-IFQ program resulted in any change in the CURRENT MARKET VALUE of this seafood business?

- Yes, it has led to an increase in the value of the business.
- Yes, it has led to a decrease in the value of the business.
- No, there has been no change in the value of the business as a result of the implementation of the GT-IFQ program. → GO TO # 17

16(a). Please explain what aspects of the program led to the change in CURRENT MARKET VALUE.

Section 4: GT- IFQ Share in Business Operations

17. Do you or your business currently hold any GT-IFQ shares?

- Yes
- No → GO TO # 18

17(a). What proportion of the “2014 Post-GT-IFQ” GROSS SALES given in Question 6 is represented by your shares?

%

18. Do you or your business plan to acquire shares in the future?

- Yes → GO TO # 18(a)
- No → GO TO # 18(b)
- Undecided → GO TO # 19

18(a). What would be the primary reasons for acquiring additional GT-IFQ shares?

(check all that apply):

- Increased GT-IFQ shares would allow me to expand my dealer/processor operations.
- I would like to increase and/or change the product mix of GT-IFQ species that I am currently allowed to harvest with my existing GT-IFQ shares.
- Other (Specify):

18(b). What would be the primary reasons for not acquiring additional GT-IFQ shares?

(check all that apply):

- The cost of acquiring GT-IFQ shares is high relative to any expected benefits I might receive from additional GT-IFQ shares.
- My business is currently at an 'optimal' size and therefore I need no additional grouper/tilefish product.
- I can buy all of the raw product I need at a reasonable price from local fishermen or other sources.
- Buying GT-IFQ allocation better suits my business.
- Other (Specify):

19. Do you provide GT-IFQ allocation to vessels not owned by you or your business?

- Yes
- No → GO TO # 20

19(a). What arrangements does your business have with fishermen to whom it provides allocation?

(check all that apply):

- Fishermen must sell their catch (associated with GT-IFQ allocation) to my business. No payment for the GT-IFQ allocation is required.
- Fishermen must sell their catch (associated with GT-IFQ allocation) to my business. Payment for GT-IFQ allocation is subtracted from payment for their catch.
- Fishermen must pay 'up front' for the GT-IFQ allocation provided but are not required to sell their catch to my business.
- Other (Specify):

20. Of the GT-IFQ allocation you held on an annual basis, what percent on average was:

used for vessels owned by you or your business?	%
provided to fishermen who own their own vessels with the stipulation that they sell their catch to your business?	%
provided to fishermen with no requirement regarding sales?	%
sold (leased)?	%
Other (Specify): _____	%
TOTAL	100%

Note: Total should sum to 100%.

Section 5: Opinions Regarding the IFQ Program

21. How satisfied are you with the IFQ Online System for managing and completing landing transactions?

Highly Unsatisfied	Unsatisfied	Neutral	Satisfied	Highly Satisfied	No Opinion
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

21(a). What improvements would you suggest to the IFQ Online System?

22. How satisfied are you with the customer service you receive when contacting NOAA Fisheries Service regarding questions about the IFQ Program (e.g. help with an account, making a landing transaction)?

Highly Unsatisfied	Unsatisfied	Neutral	Satisfied	Highly Satisfied	No Opinion
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

22(a). What improvements would you suggest to IFQ customer service?

23. How satisfied are you with enforcement of the IFQ Program?

Highly Unsatisfied	Unsatisfied	Neutral	Satisfied	Highly Satisfied	No Opinion
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

23(a). What improvements would you suggest to the enforcement of the IFQ Program?

THANK YOU FOR COMPLETING THE SURVEY

Please return questionnaire to:

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