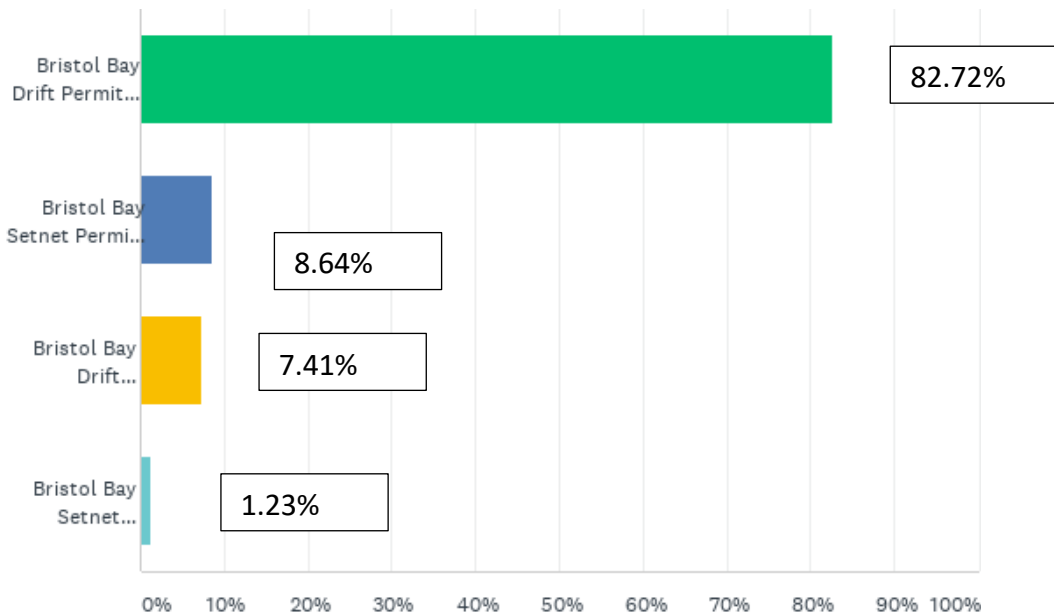


Results from Fleet Survey August-September 2020

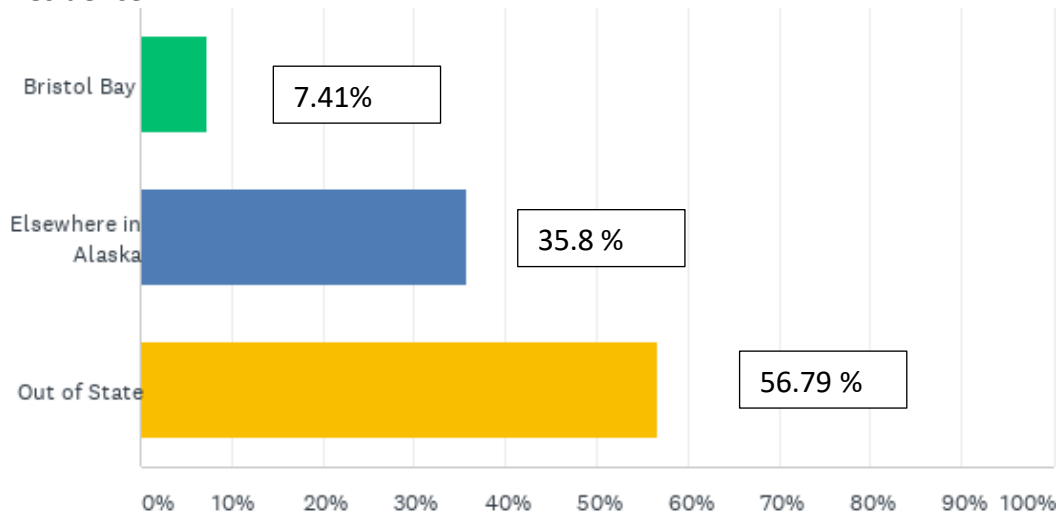
A survey was disbursed by BBRSDA between August 19, 2020 and September 6, 2020 in an email to members and many Facebook posts. **Eighty-one** people responded to this survey, **sixty-seven** of which were Drift Permit Holders, the other respondents were crewmembers or setnet permit holders. The drift permit holder respondents represent only **3.6% of the drift fleet**. Being such a small sample, these results are not conclusive of the entire fleet. We encourage your participation in future outreach so we may better understand fleet priorities.

The comments included in this document are shown as they were submitted by survey respondents and do not reflect the position of the BBRSDA.

Survey respondents were Bristol Bay drift permit holders, setnet permit holders, drift crew and setnet crew:



Fisher Residence:



The following ideas are being discussed within the fleet. Respondents were asked to rank them on their importance. No two topics could be given the same rank. A forced rank was required because even if respondents thought they are all important we wanted to know what was the most important issue.

	(1) LEAST IMPORTANT	(2)	(3)	(4)	(5)	(6) MOST IMPORTANT	TOTAL	WEIGHTED AVERAGE	Ranked:
Achieve more transparency from processor regarding the 2020 ex-vessel price.	6.17% 5	6.17% 5	9.88% 8	12.35% 10	20.99% 17	44.44% 36	81	4.69	#1
End the open ticket policy with processors.	11.11% 9	8.64% 7	13.58% 11	19.75% 16	20.99% 17	25.93% 21	81	4.09	#2
Get more domestic (or foreign) buyers in Bristol Bay to create competition.**	8.64% 7	9.88% 8	25.93% 21	17.28% 14	25.93% 21	12.35% 10	81	3.79	#3
Engage a negotiator/arbitrator/representative for the fleet.	19.75% 16	19.75% 16	17.28% 14	20.99% 17	14.81% 12	7.41% 6	81	3.14	#4
Expand custom processing so fishermen (and/or BBRSDA) can directly market more fish.	32.10% 26	22.22% 18	12.35% 10	14.81% 12	11.11% 9	7.41% 6	81	2.73	#5
Pursue legislation requiring processor profit sharing with fishermen.	22.22% 18	33.33% 27	20.99% 17	14.81% 12	6.17% 5	2.47% 2	81	2.57	#6

Comments about the question above (in order received):

“There must be some shared risk between fishermen and processors. Processors funnel all of their potential and realized losses and expenses down to the fishermen. Not right. Not fair.”

“Let us know what the base price will be or estimated before the season begins. Would help us all on expenses.”

“More Transparency would be nice.”

“I have not been onboard with the direction of BBRSDA in a long time. We continue to pay one percent and this money goes to help promote & advertise fish which helps to benefit our processors. And, while the fish quality has never been better, yet we received \$0.70 per lb this year. I have a well maintained RSW system and I am paid an additional \$0.25, therefore I do not agree with my 1% going towards ice barges and extra refrigeration units, etc. The 1% need to work for the fishermen and the way it is currently being done, it appears those who have invested their earning back into their equipment, such as RSW, are now paying for those who chose not to reinvest in their own business. In conclusion, I would like to see the BBRSDA in the direction of ensuring that the Bristol Bay fishermen receive a fair price from our processors. The rating for the "Engage a negotiator/arbitrator/rep for the fleet" should be a professional and NOT a BBRSDA member. This role needs to be filled by an outside 3rd party contracted person. If it were to be a BBRSDA board member I would rate this lower in importance. Thank you!”

“All of these are important!”

“There all least important, this isn't your job on any capacity, stop kicking hornets' nest.”

“I would like to see the BBRSDA hire a negotiator/representative who is focused on ending the open ticket policy, securing a pre-season price for BB fisherman and getting the processors to share more data with fisherman.”

“As far a passing a law to require profit sharing with fishermen I think it would be a waste of time as we have no leg to stand on if someone can find an avenue into this I'm all for it I just think it's a waste of time and resources as the professors [processors] have a lot more money to pour into lobbying against it that it will never gain traction.”

“Put pressure on the state and local municipalities to engage, pool resources and get paid more as well.”

“Would like to see co-op/profit sharing ventures developed to market our product to the US market where the dollar is worth more than the Yen and Americans have developed a taste for high quality Salmon. Fishermen are being taken advantage of and being paid far too low of price for the fish we catch.”

“All of the above topics are important However, the open ticket and the ex vessel price are of huge concern to me! Something needs to change! We are catching and selling a commodity, and from what I can see we should not be seeing a near 50% decrease in base price. If the processors want to use the high overhead cost of covid as an excuse to lower price and I find out they received funds from government (ppp), there is something wrong with that. We as fishermen had higher overhead costs also. And I feel we are taking the biggest hit. There needs to be more transparency on there price selection. Because to me it seams vary random and in the favor of the processors.”

“For me the best service and most profitable time in the bay has been immediately after Silver Bay came into operation. Every cannery was fighting for fishermen. Now that things have stabilized again it feels like we are on a slow spiral to more of the same. Especially with the consolidation we are seeing with OBI and Trident/Peter Pan. I think more smaller operations creates more competition and hopefully

opens up better opportunities for hyper quality markets (similar to PWS) and brings up the general average for everyone.”

“Covid has upended the economic certainty worldwide. The processors have held back on the season end price in order to make sure the effects to the seafood sector do not have negative consequences to them. If the price remains low after all the fish has sold, then yes the fishermen, including myself would have a legitimate grievance. The wholesale price has gone up compared to last year.”

“Re: more competition, this makes the most sense if it an protect fishermen from being put on limits, but I would prefer to see domestic over foreign.”

“We need to work on the state to recognize that millions of dollars are being lost to them through lack of fish price transparency. this is true with all species landed in the state. state is asleep at the wheel!

“I've been trying to become a direct marketer for many years and have tried several different strategies all to not much success. The main hurdle is of course getting your fish processed at a reasonable rate, without losing peak fishing time, and dealing in sufficient volume to ship south via container. I think an excellent program idea could be to organize independent marketers to share container space since you have to move a lot of weight to fill one up yourself. Building up to that point is not easy.”

“We need foreign processors and cash buyers.”

“The former ASMI plant located in Anchorage off Raspberry [road] was a complete failure. Learn from history or hire resources who possess the experience to lead the association please.”

“None of these are important to me.”

“Why should we bare all the risk? As a fisherman, I would love to be in the processor position and able to dictate my input costs so I always make a profit.”

“Stop the collusion among the processors.”

“I did rank the issues listed but do not feel they are representative of my real concerns. As a SBS shareholder, I think that I have taken steps to limit some of these problems. I do feel that corporate owners of SBS do not have the interests of BB owners at heart. They are in it for their own profits. That said, we do have more ability to effect our profits by doing all we can to increase the quality of our catch. Now that SBS Naknek has no debt, it remains to be seen as to how the profits will be disbursed. More buyers can do nothing but help all BB fisherman. I have never seen price negotiations work real well in the past.”

“We need to have the permits go thru the bbrsda and not fish and game so no one can fish before a set price and no scabs.”

“It's hard to rank these since each one of them could make a difference. I'm willing to support multiple approaches to address the price issue. Tops, though, are increasing custom processing (gives individuals more control over their fate), and engaging a professional to negotiate for us.”

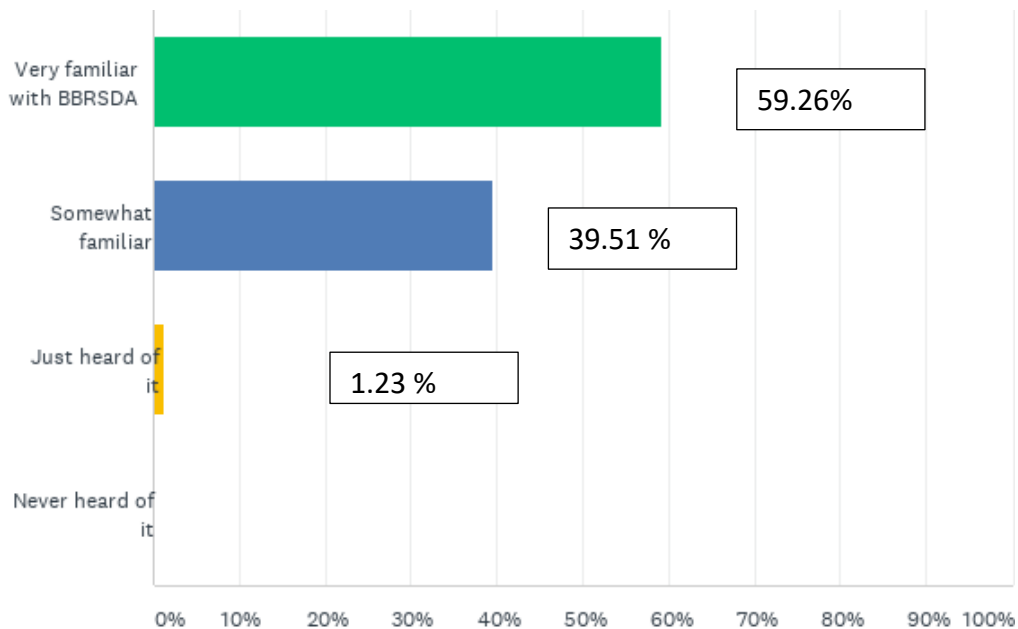
“A price negotiator is an extremely bad idea! It has worked in the past for non-terminal fisheries like crab, halibut and black cod. Production fishermen will always make it on volume in Bristol Bay. They will never sacrifice fishing time for negotiations or worse, a strike.”

“Foreign processors would provide needed competition.”

“I am very happy with this going out to the fleet.”

“More transparency is the most important. I personally custom process my own fish and direct market my own. I know the expenses and what I will be selling the fish for on the other end. I am not sure that it is such a question of what I want to pay. I know of one other business that works this way. Sugar Beets, I live where sugar beets are raised and the grower does not know what he will be getting for his work or should I say INVESTMENT! The little margin is dumped on the fisherman. The most important part, and we get the left overs. If they didn't have us they wouldn't have fish. Are there expenses that come up yes, but that is in any business. They paid .70 cents a pound for Salmon back in the 70's. This has what has driven us to take it into our own hand and started to direct market and now we process our own. We don't need more buyers the processors need to be more confident in the prices on the other end. High quality salmon = High \$\$\$”

Familiarity with Bristol Bay Regional Seafood Development Association (BBRSDA):



Respondents were asked to rank the following BBRSDA activities on their importance:

	(1) LESS IMPORTANT	(2)	(3)	(4)	(5) MOST IMPORTANT	TOTAL	WEIGHTED AVERAGE	Ranked:
Supporting Fishery Management and Maximizing Sustainable Harvest Volume	8.86% 7	8.86% 7	30.38% 24	22.78% 18	29.11% 23	79	3.54	#4
Marketing and Advertising Bristol Bay Salmon	12.66% 10	10.13% 8	11.39% 9	35.44% 28	30.38% 24	79	3.61	#3
Improving Fish Quality	15.38% 12	17.95% 14	28.21% 22	30.77% 24	7.69% 6	78	2.97	#5
Opposing Pebble Mine	16.05% 13	6.17% 5	9.88% 8	29.63% 24	38.27% 31	81	3.68	#2
Price Negotiation and/or Market Transparency (Market Information)	13.75% 11	5.00% 4	10.00% 8	21.25% 17	50.00% 40	80	3.89	#1

Comments in response to the question: Are there other topics or issues you would like BBRSDA to pursue and how do those compare to the activities listed above? (in order received):

“There should be an established floor to the price we can accept. Base price this year compares to what we got 20 years ago. Expenses go up, price of fish drops. The burden of Covid shouldn’t be washed down to fishermen only.”

“How is someone that catches 300000 lbs fish worth more than someone that catches quality fish and catches 80000 lbs.”

“The fleet not having holding tanks for the marine toilets, or not even having marine toilets and throwing raw sewage into the river system.”

“Marketing and advertising has been fairly successful, however there is no guarantee that we will share financially in the benefits. Buyers and processors definitely receive financial reward from BBRSD's promotions and advertising.”

“Allow foreign buyers.”

“Create a marketing plan AGAINST farmed fish. Formulate a policy, marketing plan and cohesive effort to fish farmed fish. Look into hiring a lobbyist to interface at the State and Federal - on issues such as farmed fish, non-U.S. seafood coming into the U.S., and pricing transparency by the processors.”

“Aye a few points: No more 'D' permits - as consolidates wealth - almost always - in the hands of the few. I am a 'D' but would give it up. Limits are also badly - unfairly - skewed for D vessels. If you really want to improve quality - do 4 things - some easier than others!: 500 lb max weight brailers - no double stacking in holds. No towing except in exceptional circumstances - or at least a concerted reduction by the fleet - yield that v tough to enforce. Scale loss a big indicator. No more production bonuses for highliners. Instead these 'bonus' profits distributed across fleet fairly. The current system means top vessels deliver quantity but not quality fish. Quality with great marketing (which you are certainly doing) equals value. Highliners wield too much power with canneries - who fawn over them and seemingly bend to their will. Their existence - as it currently stands - runs directly against the interests of the fleet and presents a major obstacle to BBRSDA in achieving the mission statement - for all. More independent QC folks on tenders - perhaps a more elaborate and detailed 7 point check list - temp, scale loss, rigour, floating, smell, bled, cloudy eyes, possibly a check for chemicals?, or softness etc. Quality is paramount. Ultimately the highliners total catches would be brought down and there would be a fairer - and golden - mean. As quality is surely the aim? Q 14 should not have been included in this survey - invasive and v divisive. We are in this together and need to put this aside - find a cohesive & strong position that is coherent both inside and outside the fishery. Finally I believe fighting the PM is outside the mission of BBRSDA - whilst acknowledging: mine = no sockeye - by increasing the value and keeping to the statement this is a great way of showing how much of a priceless resource the Bay is. That's my two cents - spend as you will. And for all these points - BBRSDA is a great association.”

“It's hard to "measure" success for working on many of the topics in this question, but all are important in my mind. Fighting Pebble is most important bc of its scope and risk to the whole fishery and area. Price negotiation/market transparency could be an (re)emerging issue. It would be new official business for BBRSDA (but not new to some organizations in the historic bristol bay). I think BBRSDA has a role here, certainly providing evidence for developing some kind of fair price that share risks and rewards between processors and fishermen. Both are necessary for a successful fishery. I view the other categories in this question more or less as equals. None are truly unworthy issues.”

“I don't see a reason to run the rsda as anything other than a non profit as in no real need for a large amount of savings on hand so in that find a way to spend it all every year I'm sorry I can't immediately think of a project or anything to spend it on but I'm sure someone will come up with the thing, as board members you signed up for this if you didn't want to do the work then you shouldn't have signed up. I guess hiring a lawyer to reinterpret and possibly change the laws and bylaws to make it possible to fund lobbying and other political activities is probably one of the most important things that needs to happen someone must have found a loophole somewhere otherwise I think the possibility of gathering signatures to take a vote on defunding the organization needs to be revisited as much of the work in marketing is directly benefiting our buyers and not getting passed on down to us I could ramble on but it seems that is all that is happening these days in all avenues of social pandering and politics so in closing put up or shut up.”

“We are taking on the burden of marketing our fish when that should be the burden of our companies. Marketing is important but being a sustainable small business fisherman in an aggressive, progressive fisheries is a must before some go bust.”

“Improving market conditions and price for fisherman is most important. Environmental issues and efforts to battle that have taken away from efforts to improve our price.”

“I want more focus on a fair price! I realize the price is based on market values and total harvest. However I feel the prices given this year are unfair and are arbitrary???”

“The lack of adherence to set net drifter allocation.”

“The local tribal leadership of Bristol Bay asked Dunleavy to close the fishery in 2020; these requests were largely ignored. As a representative of the WHOLE fleet, I would like to see the BBRSDA engage in more conversations and education about tribal sovereignty and the local Native communities. This summer has made even more obvious the need for conversations around racism and other issues of discrimination; the fleet could learn a lot from a webinar with local representatives, UTBB, etc. I know that the fleet was very conscientious this year in avoiding a COVID19 outbreak (which is appreciated), but I also feel that luck was involved. It would have been up to the BBRSDA to explain why the fleet chose to fish despite the request if a large percentage of elders died. Is the BBRSDA prepared to do that in a just and sincere way?”

“All are a 5.”

“Marketing and advertising is great. I would like to see more marketing and advertising support for direct marketers.”

“Getting setnetters to contribute to the organization. Drifters pay for the marketing of lower quality setnet fish by default and I find that offensive.”

“Fishermen are tired of the association using our resources for pet projects such as bankrolling environmental causes that are a mere smoke screen for the associations lack of experience and ability to achieve visible goals and objectives for marketing and brandbuilding.”

“I would like the BBRSDA to consider polling to unwind the organization. I'm not sure if anyone has considered why the "no lobby" rule exists for RSDAs, but it appears to be a very contentious issue that if cannot be solved, then we should be given the opportunity to dissolve the organization.”

“I direct market also I am disgruntled w/the marketing/advertising the fish it appears that every entity in the supply chain has benefited from it by increasing profits excepting we the fisherman”

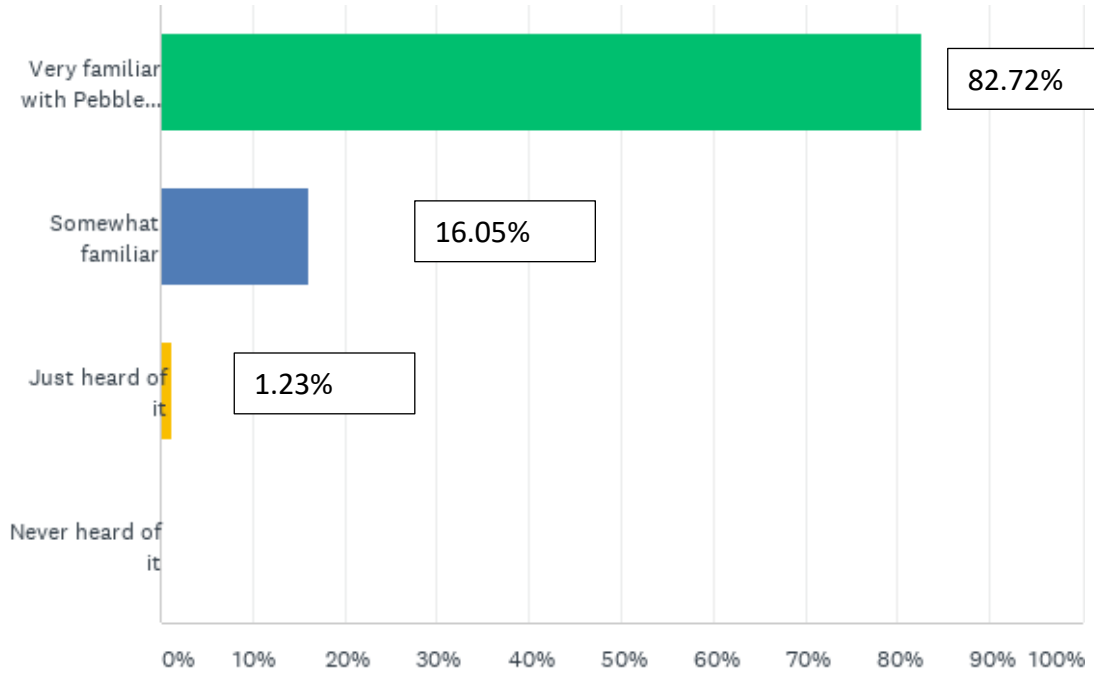
“Dragging bycatch of Bristol bay salmon.”

“Again, all of the above are important! I'd like to see more support for the individual direct marketer - infrastructure, ability to market the catch as part of the BBRSDA, connections to funding and grants, and so forth.”

“Illegal fishing. Open lines after escapement goals made.”

“Crane or Other to Get Salmon from Drift Boat to Small Processors.”

Familiarity with the proposed Pebble Mine:



Respondents in favor of and opposition to the proposed Pebble Mine:

