



# ECONOMIC OUTLOOK SURVEY

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## WEST COAST GROUND FISH INDUSTRY

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Acknowledgments:

We thank all West Coast Groundfish fishermen, processors and consumer-packaged goods manufacturers that participated in this research and provided valuable insight into their industry. Further, we would like to thank the Saltonstall-Kennedy Grant program (NOAA) for financially supporting this effort.

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# HELLO!

Welcome to the inaugural Economic Outlook study for the West Coast Groundfish industry! While this is the first of its kind, it is the intention of Positively Groundfish to conduct this study with the same set of questions at regular annual or bi-annual intervals going forward, painting a longitudinal picture of our industry over time. This survey of West Coast Groundfish fishermen, processors and consumer-packaged goods manufacturers unveils and quantifies their perceptions and expectations of the market, of key challenges and opportunities and of their own organizations' plans over the coming 12 months. Yet, while this study looks into the future, it is to be read as a snapshot in time. It is, in essence, a pulse check on the West Coast Groundfish industry.

Economic outlook studies are inherently subjective. They are a study of subjective sentiment of key participants and their predicted behavior, rather than a purely quantitative economic analysis. And as with all predictions of the future, they are inherently inaccurate, biased and cannot take into account the unexpected or unknown. Nonetheless, tracking economic confidence of key industry participants is valuable as a leading economic indicator and has some predictive ability. First, industry participants often have

a forward view of contracts, new products, projects or investments that are in the pipeline but are not yet public. Second, they have a much more intimate understanding of their own resources, production factors and ability or limitations to meet the challenges they face. And finally, while industry participants' economic outlook and confidence is subjective, it is their subjective point of view that will be driving their decisions and behaviors, and collectively, that of the industry. Our hope is that this survey will prove insightful for policymakers, investors, researchers, media as well as members of our industry and communities.

Yours positively,

Jana Hennig  
*Executive Director*





# METHODOLOGY

## Total: 23 Respondents

### Data Collection

The survey was conducted via Google Forms during mid-November to end of December 2018. Participants were specifically invited to participate in the survey. 23 of 28 invited took part. All response sets qualified and were accepted into the final survey. A copy of the survey questionnaire can be found at the back of this report.

It is worth noting specifically, that this is not a comprehensive survey of all industry participants and must be understood as such. Participating processors represent over 90% of all non-whiting West Coast Groundfish volume processed. However, the 12 participating commercial fishermen represent only 17% of vessels participating in the fishery.



### Survey Participant Profile

The 2019 West Coast Groundfish Industry Economic Outlook Survey received 23 responses from invited industry participants.

Of these 23 respondents, 12 represented harvesters (captains or boat owners), 9 represented processors and 2 consumer packaged goods manufacturers, all directly involved in the West Coast groundfish fishery.

Respondents were very senior decision-makers in their respective organizations such as CEO/Owner (54%), general manager (9%), boat captain or vessel owner (18%), who had a thorough understanding of the breadth of opportunities and challenges facing their organizations, and have the authority to make decisions on investments, personnel and business strategy.

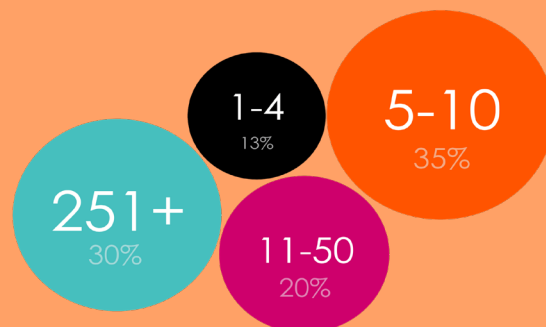
Survey participants come from a diverse set of organization sizes. Almost half of respondents work for small businesses (13% in businesses between 1-4 employees, 35% of in businesses with 5-10 employees), 22%



in medium-size businesses between 10-250 employees, and 30% are leaders of large organizations with more than 250 employees.

The vast majority of respondents (75%) spend the majority of their time in Oregon, while 15% are in Washington State and 10% in California. Although the study was not designed for it, this geographical split of respondents roughly aligns with the geographical breakdown of groundfish landing volumes.

### Size of Organization - Number of Employees





# KEY INSIGHTS

1

Processors are more optimistic in their economic outlook than fishermen. Processors have high confidence in their own organizations' future, they believe Groundfish will become more important to them, and they plan on investing in it.

2

Fishermen are more optimistic about the wider market than their own business. For processors the reverse is true.

3

West Coast Groundfish is expected to become relatively more important to the respondents' organizations, especially to processors and consumer-packaged goods manufacturers.

4

Most expect input costs to increase, with a notable impact on their profit line. While 48% of respondents expect their top-line revenue to increase, only 23% expect their bottom-line profit to increase.

5

Processors and fishermen do not share price expectations. Processors are more optimistic and expect both volumes and market prices to increase, driving revenue growth. Whereas fishermen largely expect prices to remain the same and are split on volumes.

6

Availability of skilled filleting labor is the key limiting factor for growth. Processors rank this their greatest challenge. The tight labor market means that processors are understaffed and want to hire, but most are unable to fill the positions.

7

Both fishermen and processors expect to be making greater investments in equipment. Processors generally plan for more investment expenditures than fishermen, but especially in equipment (more automation in response to lack of skilled labor) and marketing.

8

There is excess capacity in the system, both in terms of available fish/quota and production capacity/vessel capacity.

9

The industry's greatest challenges are policy-driven factors – regulation, quotas, infrastructure, labor – and not environmental, markets or cost-related factors.

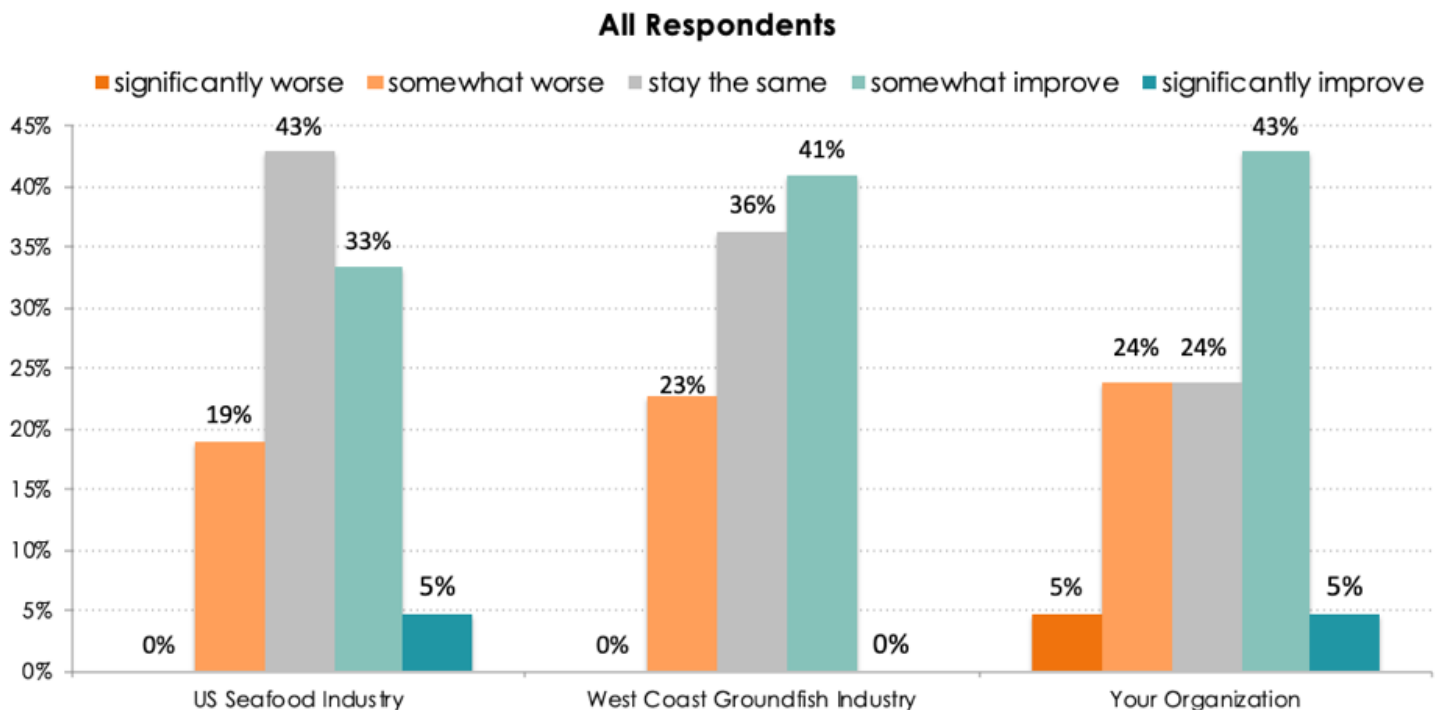


# 1. OVERALL ECONOMIC OUTLOOK

Overall, respondents have cautious optimism about the economic outlook for the US seafood industry as a whole, with 38% of respondents expecting the domestic industry to improve at least somewhat compared to the previous 12 months, whereas only 19% expect it to worsen somewhat. Though, the number one response at 43% is an expectation that the economic outlook remains more or less the same as in the previous year, reflective of a mature and relatively stable industry.

Encouragingly though, respondents are more positive in their outlook for the West Coast Groundfish industry and even more so for their organization specifically. Positive sentiment increases to 41% for the West Coast Groundfish sector and 48% for their own organizations, compared to only 38% for the total domestic seafood industry. However, it's interesting to observe that negative sentiment increases in a similar pattern from 19% for the total US seafood industry, to 23% for West Coast Groundfish and up to 29% for their own organizations. It is the middle-ground answer of "remain the same" that decreases as we get closer to the respondents' field of influence. We believe that is a natural reflection of their more nuanced understanding of the economic circumstance and a greater ability to forecast and set distinct economic expectations for their own organization and the specific fishery sector they operate in.

**Q1:** Please select the rating that best describes your view of the economic outlook for the next 12 months (compared to the most recent 12 months). I expect it will get...

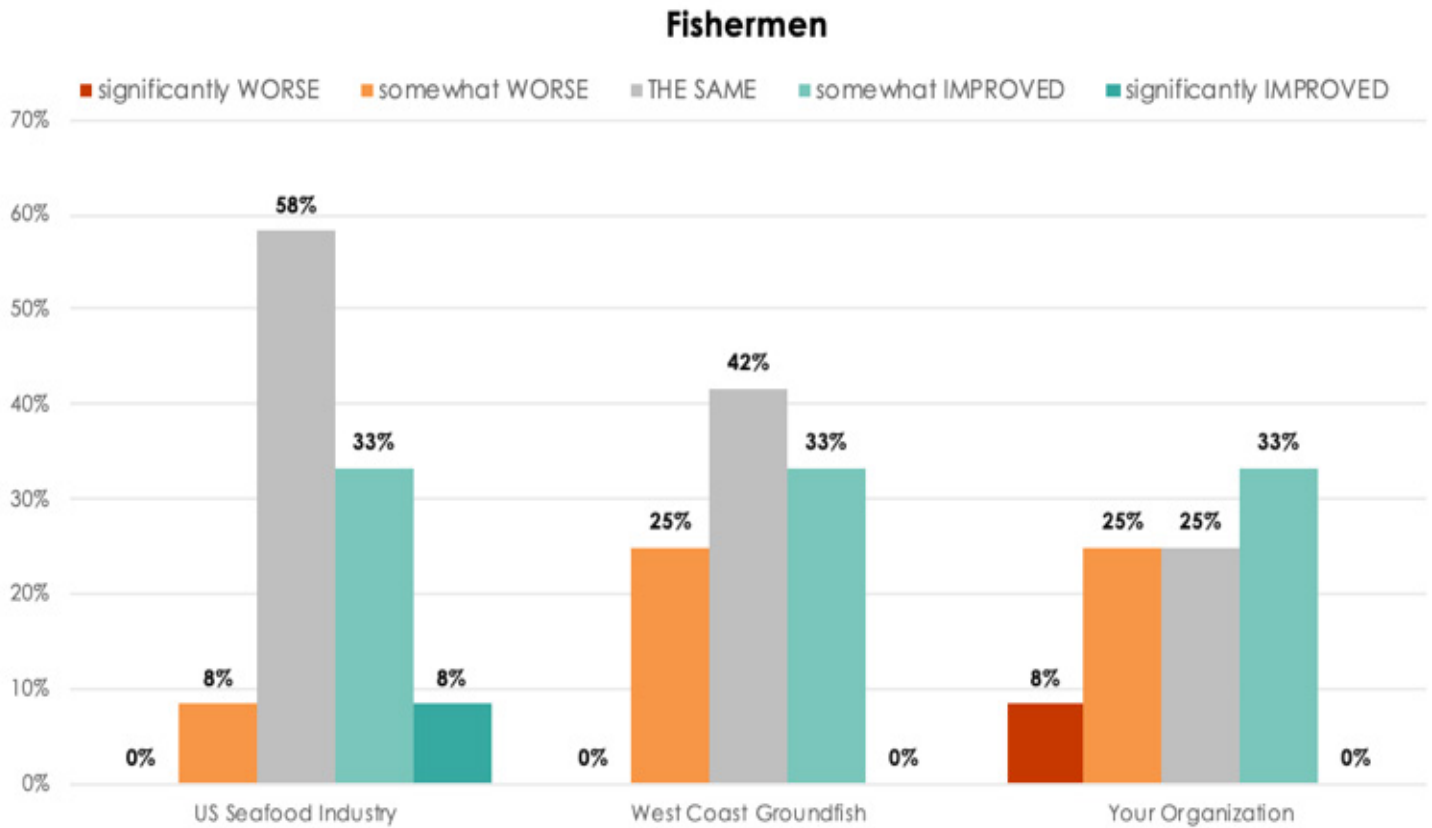




## Results by Participant Group

When breaking down responses by participant groups, we see that there are notable differences in economic confidence between fishermen and processors. First, processors are notably more optimistic about their organization's economic outlook than fishermen.

**Q1:** Please select the rating that best describes your view of the economic outlook for the next 12 months (compared to the most recent 12 months). I expect it will get...



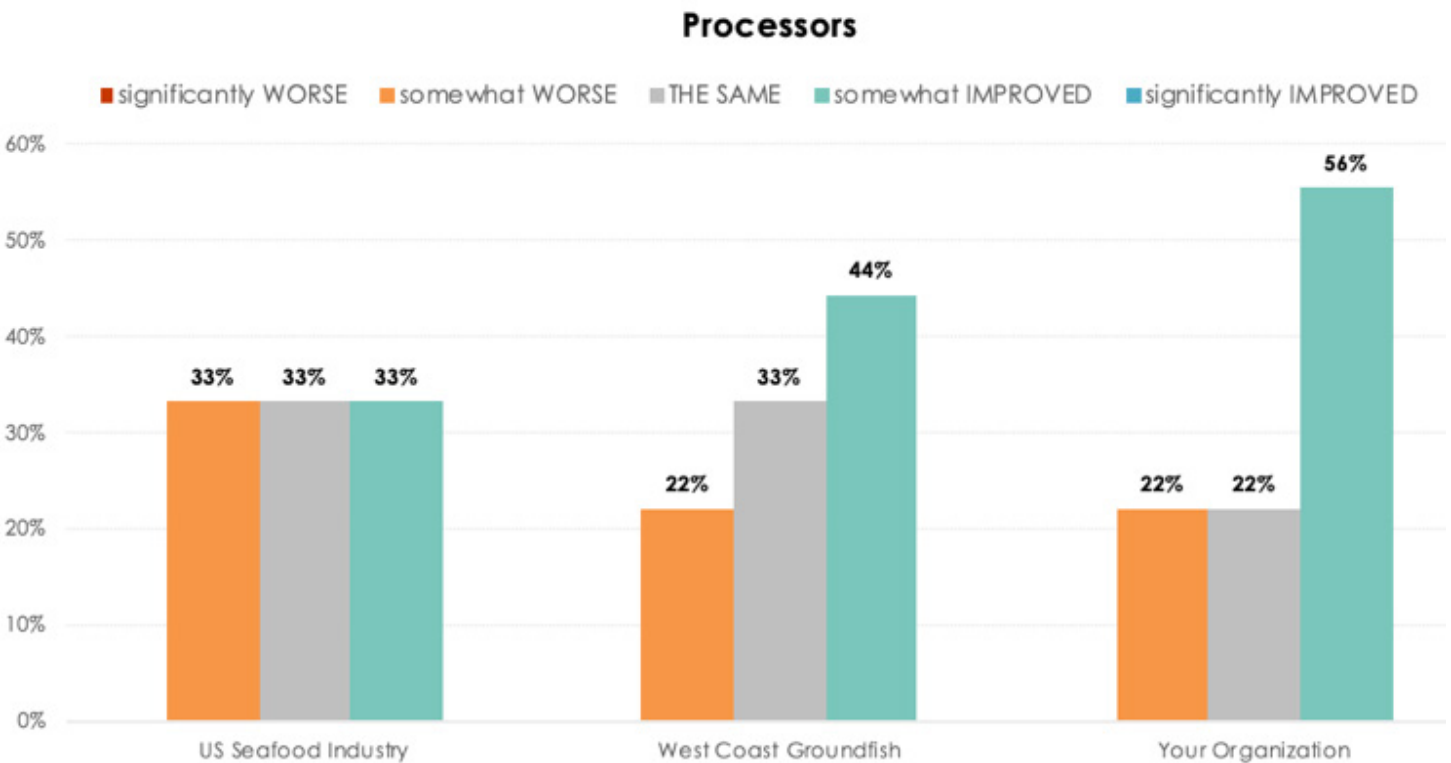
Second, fishermen tend to be more optimistic about the overall seafood industry but get increasingly pessimistic about the Groundfish sector and their organization specifically, whereas processors, in a reverse pattern, are more optimistic about their own business than the wider market.

Fishermen rate the future for the US seafood industry at large more positively (38% positive vs 8% negative outlook) than the West Coast Groundfish sector (38% positive vs 25% negative outlook) and, crucially, their own organizations specifically. While 33% of fishermen hold a slightly positive outlook an equal 33% have a negative outlook for their own organization. However, that includes 8% who believe their organization will fare significantly worse during 2019 compared to 2018, which skews the response curve more negatively overall.



Processors, on the other hand, rate their own organization's outlook (56% positive vs 22% negative outlook) for the coming 12 months much more positively than the West Coast Groundfish sector (44% positive vs 22% negative outlook) and the domestic seafood industry overall (33% positive vs 33% negative outlook).

**Q1:** Please select the rating that best describes your view of the economic outlook for the next 12 months (compared to the most recent 12 months). I expect it will get...



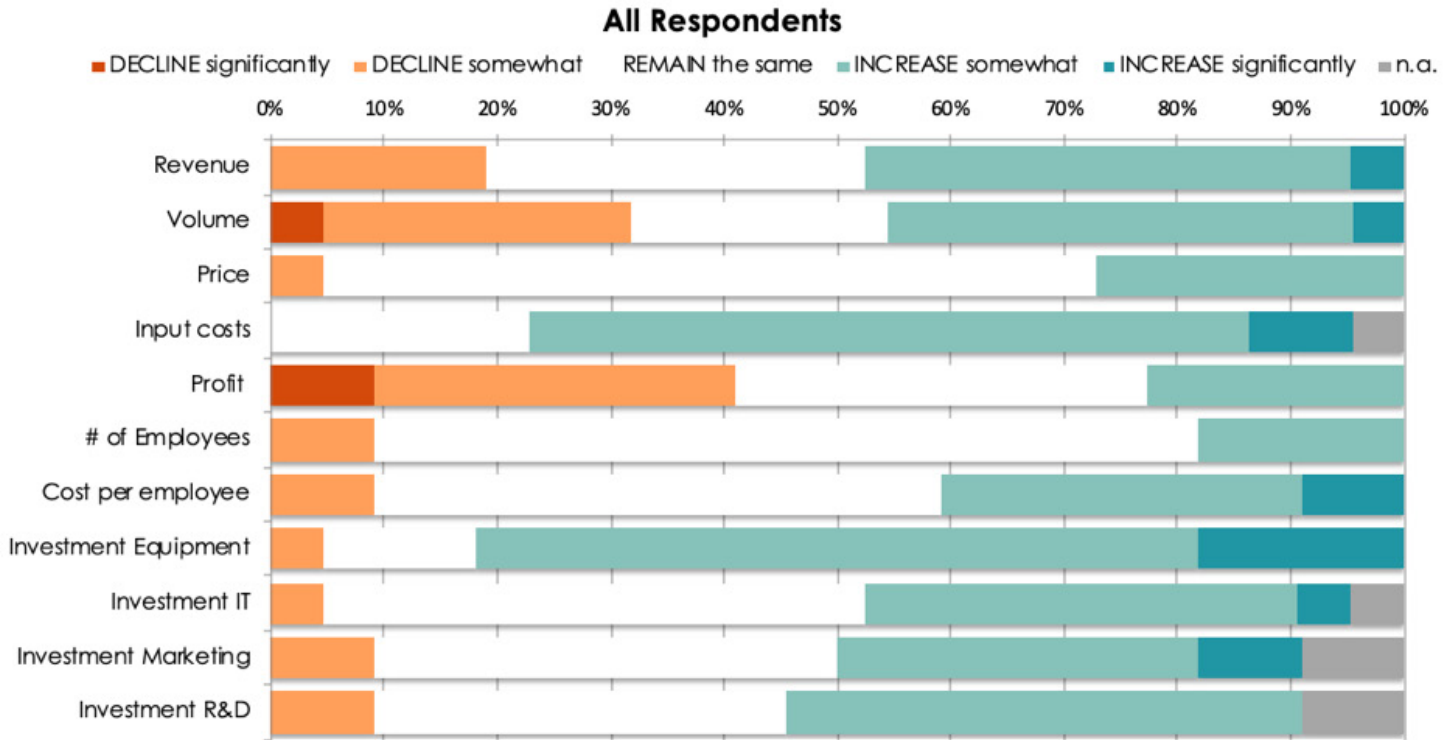
There are several potential causes and interpretations of these differences. First, processors tend to have a much more diversified business processing or distributing a lot of species and product lines, whereas fishermen tend to participate in just a few fisheries. Processors' higher confidence might thus be linked to other fisheries and product lines outside of West Coast Groundfish. Second, processors tend to have more information about the downstream supply chain and markets, deals in the making, new product launches or consumer level data that could make them more confident than fishermen who have less visibility of longer-term plans. Third, processors may have higher confidence in their ability to extract value from West Coast Groundfish through their negotiation power or projected efficiency gains. Finally, confidence and economic outlook are inherently subjective feelings that may be influenced by participants' general outlook on life, their tendencies toward optimism/pessimism, or their varying interpretations of events and information. The seafood processing and seafood harvesting sectors may just attract people with inherently different dispositions, that bear out in this survey.





## 2. ORGANIZATIONAL INDICATORS

**Q2:** Please indicate your view of the probable change over the next 12 months (vs most recent 12 months year) for your organization, for the following key indicators, as it relates to WC Groundfish



Next, we asked survey participants to give us their expectations of directional change for key organizational metrics and indicators.

Roughly half of respondents expect their revenue from West Coast Groundfish to increase at least somewhat over the coming 12 months. In aggregate, the survey group expects that more of that revenue growth will be driven by increases in volumes of fish sold and less so from increases in price, which 68% of respondents believe to remain the same.

However, a full 73% of survey respondents expect input costs to increase, affecting their organizations' profit line, which is viewed more pessimistically than any other indicator we studied. While 48% of respondents expect their top-line revenue to increase, only 23% expect their bottom-line profit to increase, presumably because of expected increases in the cost of production.

We see that the majority of respondents (73%) expect the number of employees to remain more or less stable over the coming year, but they do expect the cost per employee to increase, reflecting an ever tighter and more competitive labor market in the US.



Most organizations expect to continue making investments in West Coast Groundfish operations, at least at the same level if not at an accelerated level compared to the previous year, across key departments/investment categories. Very few respondents expect to be reducing their investment in this fishery over the coming 12 months. No less than 82% of respondents expect to be making increased investments in equipment relating to West Coast Groundfish, 18% of which expect to be making significantly higher levels (> +10%) of equipment investments. Investment in equipment is expected to increase more than any other category. This is followed by investments in Research & Development, then by investment in IT, and finally in investments in Marketing & Sales (which 9% feel are not applicable to their organization).

## By Participant Group

Looking at responses by participant groups reveals contrasting patterns between fishermen's and processors' expectations for their West Coast Groundfish business.

The greatest commonalities between both groups is a shared expectation that input costs will increase (not a single respondent in either group expects input costs to decrease), which results in both groups being more pessimistic about their profit line than their revenue line. And both fishermen and processors expect to be making greater investments in equipment over the coming 12 months. However, that is where the similarities end.

Overall, even a passing glimpse of the charts quickly reveal that processors are generally more optimistic than fishermen about their organization's outlook for West Coast Groundfish. Two thirds of processors but only one quarter of fishermen expect a moderate increase (+1-10%) in Groundfish revenue in 2019. Fishermen seem to largely expect prices for Groundfish to remain the same but have very split opinions about expect volumes. Whereas processors are far more optimistic about volumes and market prices increasing to drive solid revenue growth.

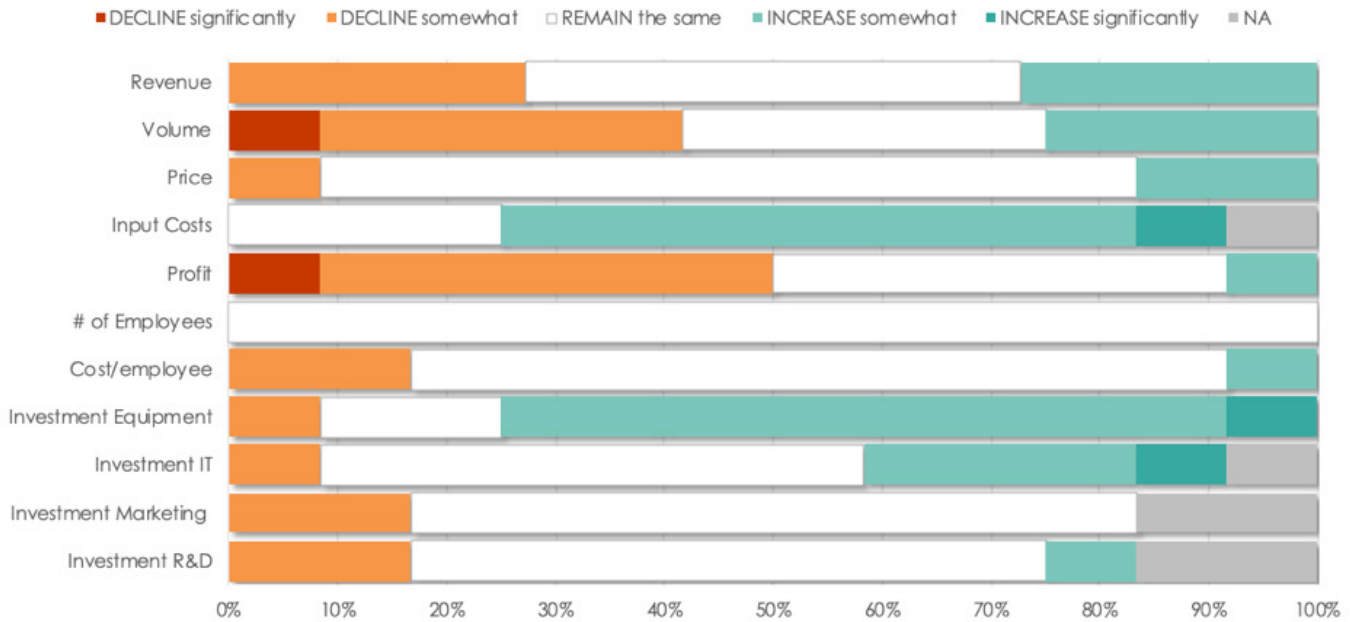
Fishermen don't expect any changes to the number of employees at all and largely expect the costs per employee to remain at similar levels to the previous 12 months. Conversely, almost all processors expect an increase in the costs per employee but are split on whether they will indeed end up with fewer or more employees, reflecting a tight labor market at the end of 2018.

Overall, processors are planning for more investment expenditures than fishermen across the board but especially so for equipment (more automation to address the difficulty in recruiting and retaining labor) as well as in marketing and sales.



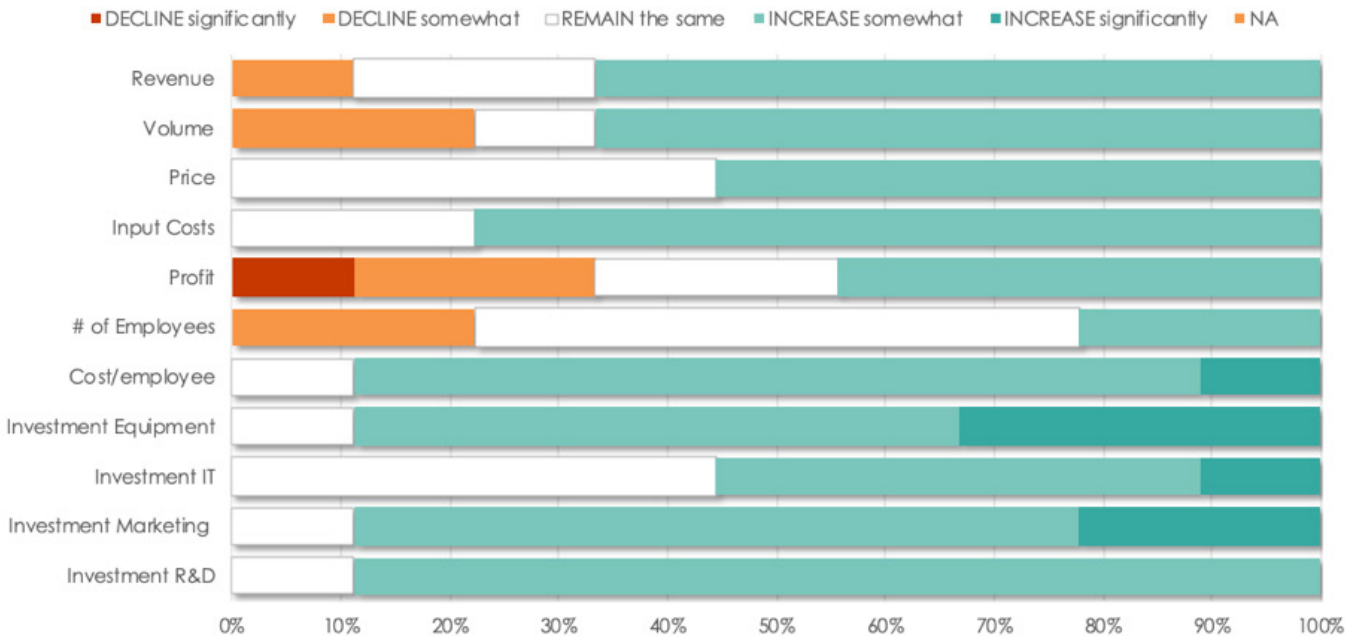
**Q2:** Please indicate your view of the probable change over the next 12 months (vs most recent 12 months year) for your organization, for the following key indicators, as it relates to WC Groundfish

### Fishermen



**Q2:** Please indicate your view of the probable change over the next 12 months (vs most recent 12 months year) for your organization, for the following key indicators, as it relates to WC Groundfish

### Processors



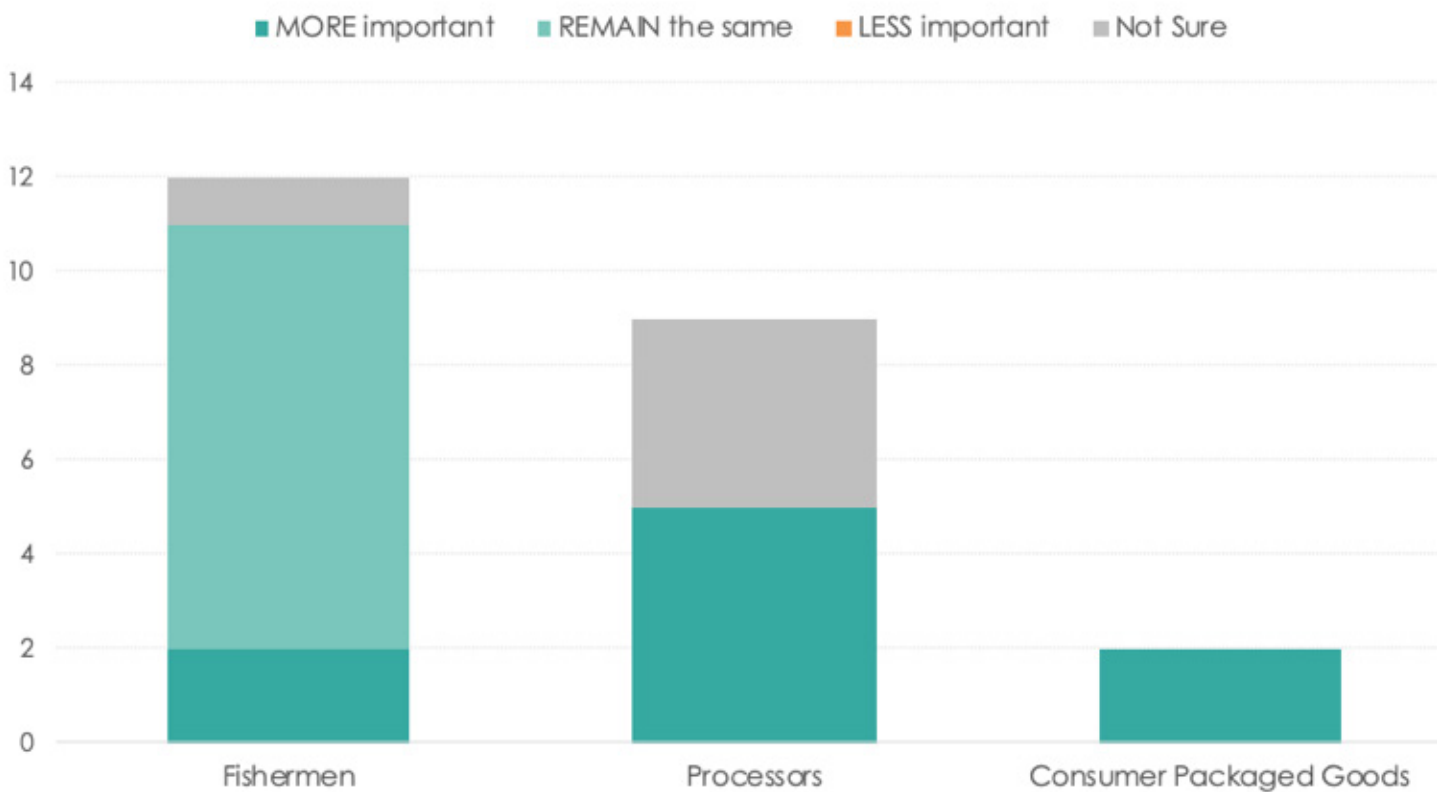


### 3. RELATIVE IMPORTANCE OF GROUND FISH

Overall, our survey shows that the industry is expecting West Coast Groundfish to become relatively more important to their organizations over the next 12 months. However, here too, we see very different response patterns emerge for different participant groups. Although, no one foresees this fishery becoming less important.

While most fishermen (75%) expect the relative importance of West Coast Groundfish to their organization to remain more or less the same, the majority of processors (55%) and all consumer-packaged goods manufacturers surveyed expect this fishery to become more important to their overall organizations.

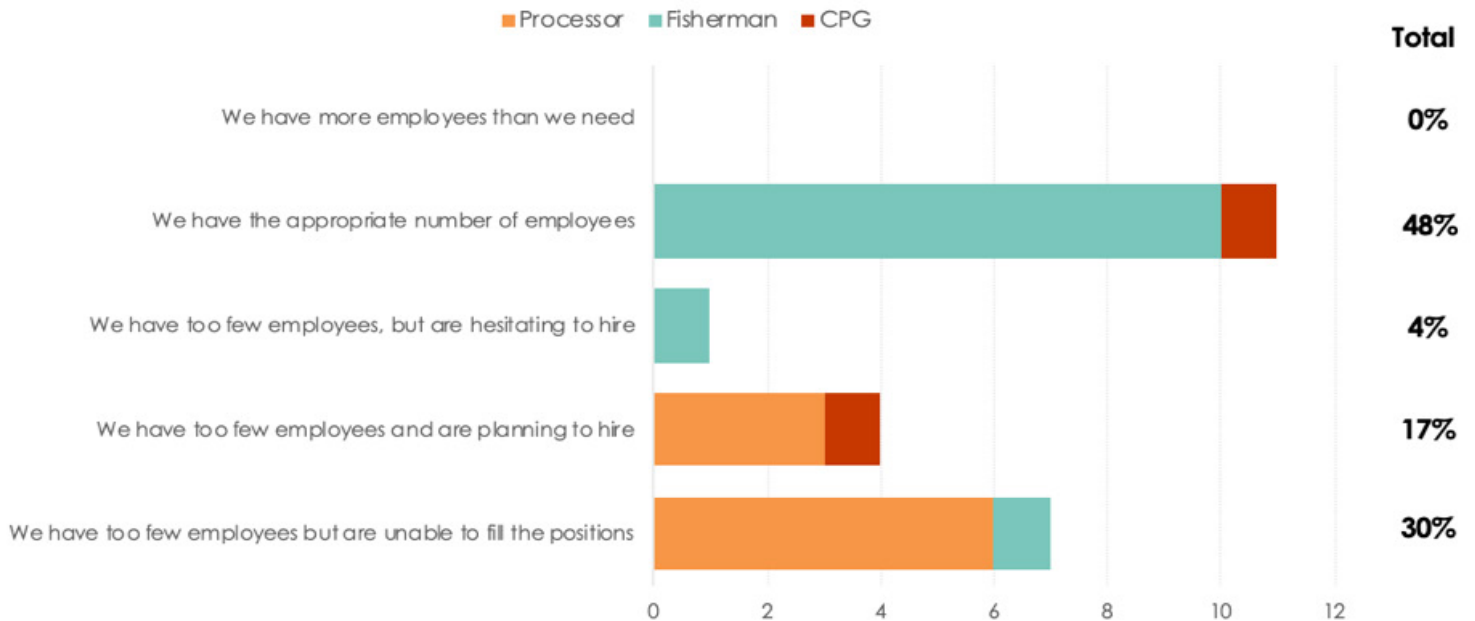
**Q3:** What is your expectation of the relative importance of West Coast groundfish to your organization over the next 12 months? I expect...





## 4. PRODUCTION FACTORS - EMPLOYMENT

**Q4: Employment** - Given current conditions, how would you characterize your overall staffing situation relative to your needs?



With a closer look at key operational input factors we can get a sense of how much room for growth there is in the system or identify systemic bottlenecks that could restrict growth of the West Coast Groundfish sector.

With respect to labor, fishermen by and large feel like they have the appropriate number of employees. Only 2 out of 12 surveyed (16.7%) feel understaffed but are either hesitating to hire or can't fill the positions.

Processors on the other hand feel understaffed and are all planning to hire more people for their West Coast Groundfish operations. Worryingly, two thirds (66.7%) of surveyed processors say that they are trying to hire but are unable to fill the positions (qualitative commentary clarified that this is mainly about filleters), making labor availability a key bottleneck for growth in the industry as a whole.

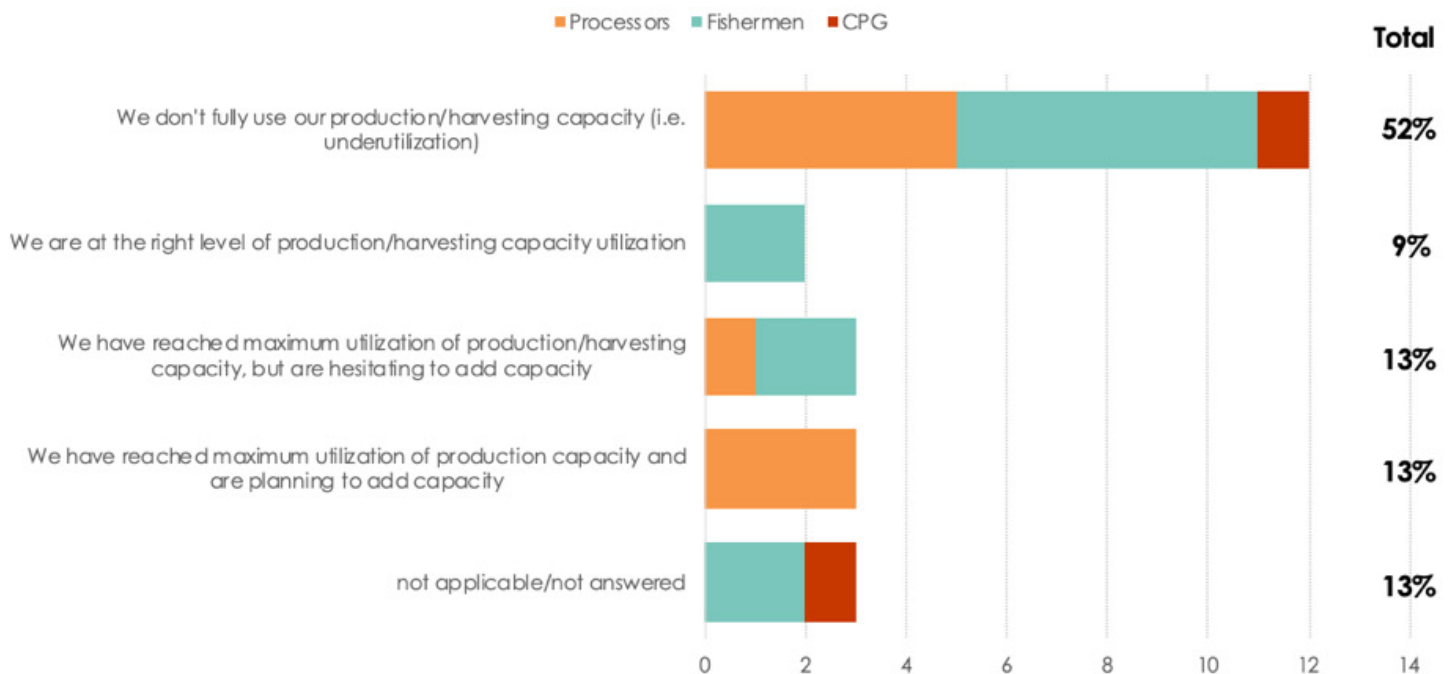


## 5. PRODUCTION FACTORS - EQUIPMENT CAPACITY/UTILIZATION

Production capacity or equipment capacity (i.e. machinery, vessel size) is a mixed bag of responses across the industry. Just over half of fishermen and processors say that they don't fully use their equipment's production capacity (i.e. underutilization), and thus have room for growth without needing to invest in equipment. Only 2 fishermen felt they reached a "goldilocks" state of equipment utilization, whereas another 2 have reached maximum capacity but are still hesitant to add more capacity.

Overall, that paints a picture of there being plenty of fishing equipment capacity (vessels) in the system and that we shouldn't expect that to increase over the coming 12 months. This does not appear to align with fishermen's overwhelming expectation to be increasing their equipment investment levels over the next 12 months from Question 2.

**Q5: Production Capacity/Equipment** - Given current conditions, how would you characterize your overall production capacity situation relative to demand for your product?

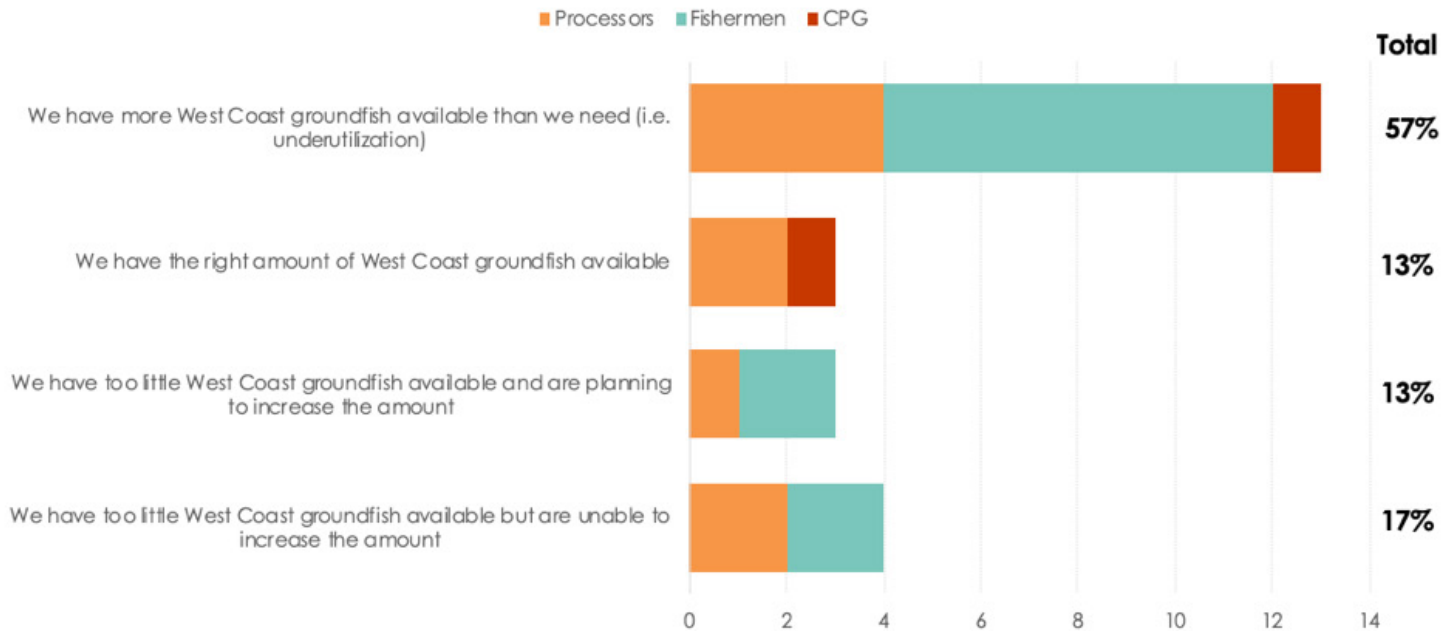


44% of processors say that they have reached maximum equipment capacity, and the majority of those expect to be adding equipment/production capacity over the next 12 months. Combined with answers in Question 2, where 88% of processors indicated that they would increase equipment investment, we can reasonably expect to see processing production capacity for West Coast Groundfish to increase going forward.



## 6. PRODUCTION FACTORS - FISH AVAILABILITY/ACCESS

**Q6: Fish Availability** - Given current conditions, how would you characterize your overall availability/access to West Coast groundfish relative to demand?



Finally, we looked closer at participants' perceived availability or access to West Coast Groundfish relative to demand for these species. 57% of survey participants (75% of fishermen and 44% of processors) believe they have more access and availability of West Coast Groundfish than demand for it and are thus in a state of quota underutilization. Only 13% of respondents feel they have just the right amount available to them.

Whereas a total of 30% of respondents feel they have too little access to West Coast Groundfish at the moment and want to get more. However, just over half of those wanting more are unable to get more fish. So, 17% of respondents (16.7% of fishermen, 22% of processors), have growth bottlenecks due to a lack of available quota or fish coming to them. Qualitative commentary by processors added that often it's not an overall lack of fish availability, but the timing and consistency of fish availability that present the greatest challenges to their ability to meet demand.





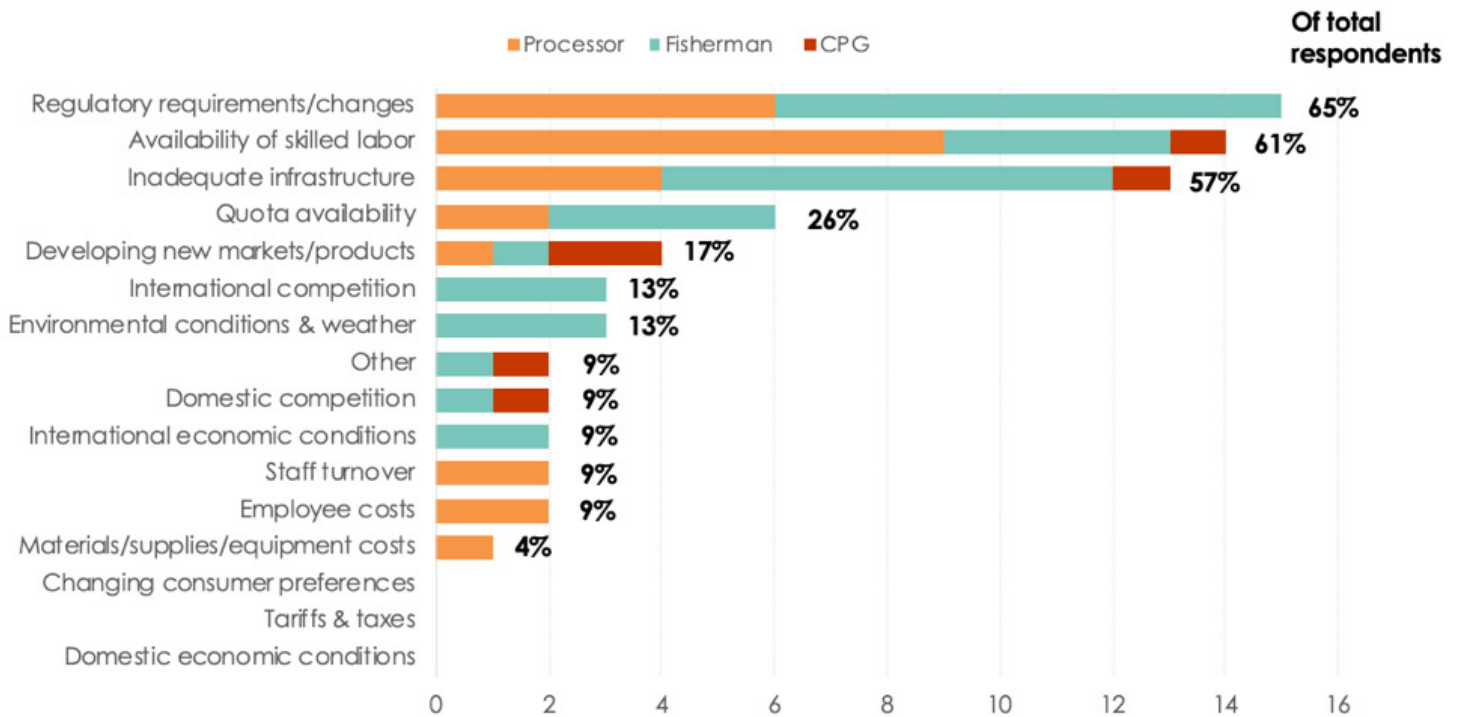
# 7. KEY CHALLENGES

Finally, our survey asked participants to identify the top 3 areas that present the greatest challenges to their businesses.

Across all participants there are 3 clearly leading areas of challenges: Regulatory requirements and changes (65%), availability of skilled labor (61%) and inadequate infrastructure (57%). Interestingly, external market factors such as domestic (0%) or international economic conditions (9%), domestic (9%) or international competition (13%), tariffs and taxes (0%), or changing consumer preferences (0%) are of relatively low concern if any. And while respondents overwhelmingly expect input costs to increase (Question 2), input costs such for materials/supplies/equipment (4%) or employee costs (9%) are not actually of grave concern to our survey participants, at least relative to other challenges.

It is really the wider policy-driven factors, such as regulations, quotas, infrastructure and sheer availability of labor (which relies on temporary work visas) that currently present the greatest challenges to the West Coast Groundfish industry.

**Q7: Please indicate the top 3 challenges for your business.**

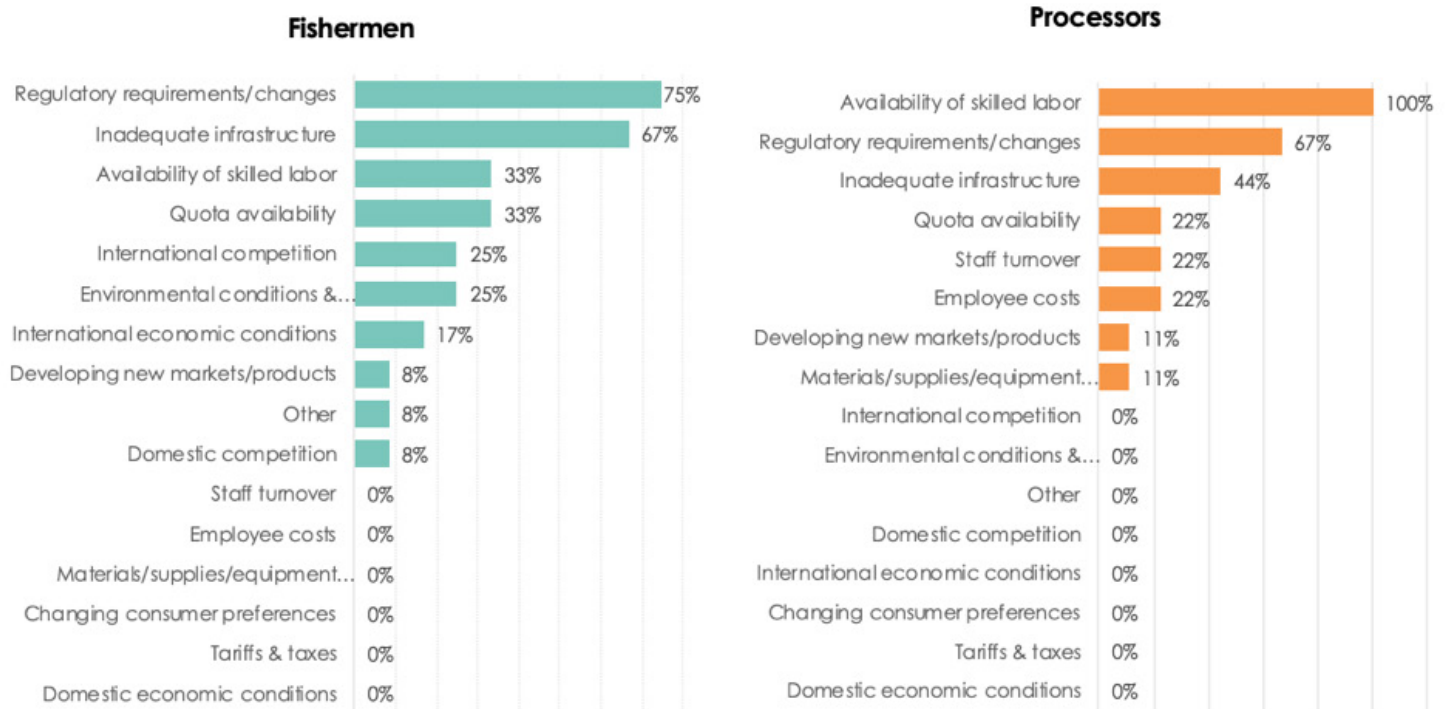






## Results by Participant Group

**Q7: Please indicate the top 3 challenges for your business.**



Looking more closely at results by participant groups, we see that fishermen and processors actually share the same set of top 4 challenge areas, although fishermen are somewhat more concerned about regulation, infrastructure and quota availability, while processors are more concerned about labor.

In fact, Question 7 makes it clear just how big of a concern labor is for processors: 100% of all surveyed processors picked availability of skilled labor as a key challenge, while staff turnover and employee costs also made the list for 22% of processors. There are a number of processor respondents whose top 3 answers were all labor-related.

Interestingly, fishermen are more worried about international competition (25%) or international economic conditions (17%) than processors. While developing new markets and products was a key concern for respondents of consumer-packaged goods, but only marginally made the list for fishermen and processors.

Arguably, as long as big policy challenges remain around regulation, infrastructure and quota, fishermen and processors have less headspace, flexibility and ability to develop new markets and products, respond to changes in consumer preferences, or take on domestic and international competition. (policy is hampering market development)

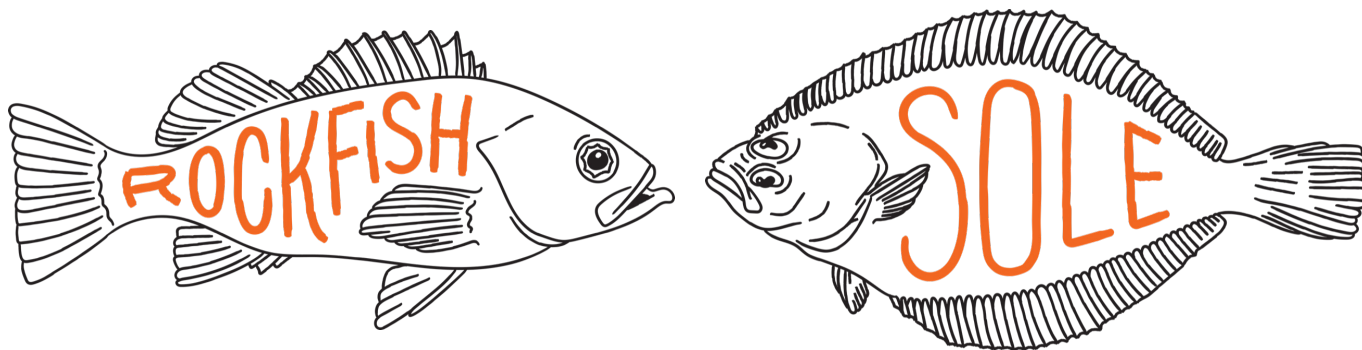


# CONCLUSION

This survey paints a picture of cautious optimism and anticipated growth for the West Coast groundfish industry. Processors and consumer-packaged goods manufacturers, in particular, appear confident about the future of this fishery. They are looking to invest in its growth and expect it to play a larger role in their company portfolios going forward. Fishermen are more cautious, holding expectations of increasing costs with no respective increases in dock prices.

By and large, the conditions for industry growth are met: There is plenty of unused West Coast groundfish quota, there is unused equipment capacity both on the harvesting and processing side, as well as readiness and willingness to invest in this fishery. Currently, the greatest bottleneck for this industry is a lack of skilled filleting labor, which will drive up processors' recruitment and labor costs, and may drive processors to invest in more automation and equipment, or potentially shift some groundfish processing overseas. In more extreme scenarios, this could also result in shortages of groundfish, which in turn could drive up their market prices, and limit gains in market penetration and new distribution points.

Overall, this survey tells the story of an industry that is fairly confident about the strength of the market, and its own ability to win in it and grow West Coast groundfish, but is concerned about external policy-driven factors such as regulations, quotas, and infrastructure.





**West Coast Groundfish Industry Economic Outlook Survey**

**State of operation**

CA    OR    WA

**Type of Organization**

Groundfish Fisherman  
 Groundfish Processor  
 Groundfish CPG

**Size of Organization**

1-4 employees  
 5-10 employees  
 11-50 employees  
 51-250 employees  
 251+ employees

**Your Position**

Captain/Skipper  
 CEO/Owner  
 General Manager  
 Head of Sales/Distr./Marketing  
 Head of Production/Plant Mngr  
 Other \_\_\_\_\_

**1. Please select the rating that best describes your view of the economic outlook for the next 12 months (compared to the most recent 12 months). Choose 1 per row.**

	significantly WORSE	somewhat WORSE	approx. the SAME	somewhat IMPROVED	significantly IMPROVED	Not sure
US Economy (Total)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
US Seafood Industry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
West Coast Groundfish Industry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your Organization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**2. Please indicate your view of the probable change over the next 12 months (vs most recent 12 months) for your organization, for the following indicators, as it relates to West Coast Groundfish.**

	DECLINE significantly	DECLINE somewhat	REMAIN the same	INCREASE somewhat	INCREASE significantly	Not sure/ Not applicable
Revenue	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Volume	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Price	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Input Costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Profit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Number of Employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cost per Employee (Wages, Recruitment )	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Investment Equipment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Investment - IT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Investment - Marketing & Sales	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Investment - Research & Development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**3. What is your expectation of the relative importance of West Coast groundfish to your organization over the next 12 months? I expect...**

- West Coast Groundfish will become MORE important to my organization
- West Coast Groundfish will become LESS important to my organization
- West Coast Groundfish will REMAIN as important to my organization as it is now
- Not sure

**4. Employment:** Given current conditions, how would you characterize your overall staffing situation relative to your needs (i.e., do you have excess capacity or are you stretched)?

- We have more employees than we need
- We have the appropriate number of employees
- We have too few employees, but are hesitating to hire
- We have too few employees and are planning to hire
- We have too few employees but are unable to fill positions
- Other \_\_\_\_\_

**5. Production Capacity:** Given current conditions, how would you characterize your overall production capacity situation relative to demand for your product?

- We don't fully use our production/harvesting capacity (i.e. underutilization)
- We are at the right level of production/harvesting capacity utilization
- We have reached maximum utilization, but are hesitating to add capacity
- We have reached maximum capacity and are planning to add capacity
- Other \_\_\_\_\_

**6. Fish Availability:** Given current conditions, how would you characterize your overall availability/access to West Coast groundfish relative to demand?

- We have more West Coast groundfish available than we can sell (i.e. underutilization)
- We have the right amount of West Coast groundfish available
- We have too little West Coast groundfish available and are planning to increase the amount
- We have too little West Coast groundfish available but are unable to increase the amount
- Other \_\_\_\_\_

**7. Please indicate the top 3 challenges for your organization at the moment. Choose 3.**

- |   |  |
|---|--|
| <input type="checkbox"/> Regulatory requirements/ changes   | <input type="checkbox"/> Domestic economic conditions      |
| <input type="checkbox"/> Quota availability                 | <input type="checkbox"/> International economic conditions |
| <input type="checkbox"/> Environmental conditions & weather | <input type="checkbox"/> Tariffs & taxes                   |
| <input type="checkbox"/> Materials/supplies/equipment costs | <input type="checkbox"/> Domestic competition              |
| <input type="checkbox"/> Inadequate infrastructure          | <input type="checkbox"/> International competition         |
| <input type="checkbox"/> Availability of skilled labor      | <input type="checkbox"/> Developing new markets/products   |
| <input type="checkbox"/> Employee costs                     | <input type="checkbox"/> Changing consumer preferences     |
| <input type="checkbox"/> Staff turnover                     | <input type="checkbox"/> Other _____                       |

**8. Please provide your name** \_\_\_\_\_

**Thank you for participating.**



## ABOUT POSITIVELY GROUND FISH

Positively Groundfish is a new non-profit organization (501c6) that was incorporated in April 2018, but it represents a fishery that has been around for generations and that was once the economic and cultural backbone of coastal communities along the West Coast. The story of the West Coast Groundfish fishery has all the elements of a classic tale of success, downfall, and redemption; and Positively Groundfish was formed to give it its happily-ever-after. West Coast Groundfish faced ecological collapse and was declared a federal economic disaster in 2000, but, thanks to comprehensive sustainability measures, has since experienced a remarkable recovery and is now considered “the ecological comeback story of the century” (quote: NOAA) and a posterchild for what sustainable fisheries management can achieve. However, more work is needed to also make it an economic success story, to communicate this hopeful story to the public, and make West Coast Groundfish a truly compelling case study that can persuade other fisheries around the world to adopt better practices. That is the work of Positively Groundfish.

Positively Groundfish was formed as a collaborative multi-stakeholder initiative by a collective of environmental non-profits, fishermen associations, seafood processors and academia that have partnered with a shared vision for a healthy and vibrant fishery. Positively Groundfish's stated mission is to tell the positive story of sustainable underutilized West Coast Groundfish to cultivate public appreciation and support the long-term economic success of local fishing communities. It is spreading a message of hope and positive responsible engagement with our ecosystems in which ecological and economic goals go hand-in-hand.

To learn more visit [www.positivelygroundfish.org](http://www.positivelygroundfish.org).



[www.positivelygroundfish.org](http://www.positivelygroundfish.org)