



Understanding the drivers of fisher engagement with industry bodies



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NON TECHNICAL SUMMARY

**2008/0335
bodies**

Understanding the drivers of fisher engagement with industry

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OBJECTIVES:

1. Understand the drivers for uptake and non-uptake of individual voluntary membership of representative organisations.
2. Understand the issues affecting membership of representative organisations.
3. Assist sectors to identify and develop guiding principles that enables strong membership for representative organisations.
4. To identify strategies to build organisational capacity to provide and demonstrate value to members.

NON TECHNICAL SUMMARY:

OUTCOMES ACHIEVED TO DATE

This project has identified:

- The need for improved communication within and between industry associations and their capacity to inform and engage with the fishers they represent
- The range of expectations and understandings of fishers of the role of their various representative bodies.
- The need for the various levels of representative bodies to differentiate their roles and activities in order to clarify for their members the value of their funding of those bodies.
- The need for improved governance, leadership development and succession planning for industry associations to better service and represent the interests of fishers.
- The need for secure funding mechanisms that support services to the industry, sector or local association in order to effectively meet the need for it be an effective partner in any co-management framework.

With the information provided from this project, Industry sector bodies have the basis for evaluating the range of services and activities undertaken to ensure they enhance their performance and relevance to fishers and the Industry.

The declining membership of fishers in all levels of representative bodies, particularly in the state peak representative bodies in South Australia, Queensland and New South Wales is undermining the success of the industry in business and political arenas. The wildcatch fishing industry throughout Australia is declining in numbers and production capacity to supply a key food to the community and the need for effective representative bodies to respond to the threats to the industry's access security.

Although industry leaders are aware of the importance of representative organisations, many individual fishers remain uncommitted to join their sector or state representative bodies or to actively participate in activities in support of the industry or sector. To develop a strong and secure industry at a sector, state and national level we need to clarify the individual's needs and expectations so that strategic and business plans are tailored to deliver tangible, long lasting benefits to the industry and therefore its members.

To better inform industry's understanding of the needs for stronger engagement and representation fishers were surveyed across all South Australian fisheries, a number of Commonwealth fisheries, and a range of sector associations in New South Wales, Tasmania and Western Australia. There were 1,227 licence holders surveyed either via direct mail out, as well as through a series of emails providing a link to the online survey site and through direct contact with fishers either at meetings or on the phone. Of those surveyed 245 fishers responded, representing 313 licences. The target for participation in the survey was 30% of those initially contacted; the final percentage was 20% of fishers or 25% of licence holders.

Ineffective succession planning in an industry results in continual recycling of people and ideas, resulting in reduced innovation. Industry needs to implement more effective succession planning structures to ensure renewal of energy, ideas, innovation and most importantly, to ensure a greater proportion of the industry is empowered to take responsibility for future industry development and prosperity. Industry has good individual leaders but needs to develop avenues for integrating those leaders with the rest of industry. Mandating leadership turnover, developing leadership teams and mentoring may all help to encourage fishers to join and support their associations.

Industry associations need support to improve their two-way communication with fishers. Support includes greater human resources to implement effective personalised communication, but also the development of better communication tools, such as contact databases, and the utilisation of web based and SMS technology for more efficient and cost effective ways of communicating.

Government and industry must develop strong partnerships, with government assisting industry bodies to collect membership fees from all fishers. This is particularly critical given the paradigm shift in fisheries management to a stronger 'co-management' framework. Under the co-management scenario, associations must expect to take on a greater proportion of the resource management role, but this is unlikely with the current resourcing of most industry associations.

Associations at all levels must develop integration mechanisms. Fishers are confused about the role of the various associations and, due to the increased workload, diversity and complexity of issues associations can no longer work in isolation. Association need to delineation roles so as to share the workload and ensure a cost efficient service is being delivered to industry. Key roles for associations shift in significance across the various levels of associations.

A key component of association integration is funding. Fishers believe that it is too costly to join all associations because there is generally a number of individual membership payments required. A single membership funding strategy is likely to reduce the perception that association costs are too high.

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Wildcatch Fisheries SA wishes to thank all of the fishers who participated in this project. The candid conversations with fishers and the willingness to critically look at themselves, the industry and their associations shows true industry leadership and a great passion for the fishing industry. Many insights were provided by these people, demonstrating a desire to assist in developing a strong innovative, responsive and empowered industry that will prosper in the future.

Photographs courtesy of C van der Geest, Martin Bowerman and QSIA

BACKGROUND

ENGAGEMENT

This research seeks to identify the issues influencing the engagement of fishers with their representative organisations or associations. To understand this, the following seeks to put into context “engagement” as it is understood particularly by commercial fishers.

There is a constant barrage of government and community programs or association activities that aim to “engage stakeholders” in some activity or project in order to meet a specific outcome. However, the rhetoric surrounding the need for engagement, for the most part, fails to effectively achieve the desired outcome. The continued investment in community and stakeholder engagement and reviews such as the ‘Towards a whole of community engagement’ commissioned by the Murray Darling Basin Commission (Aslin and Brown 2004), acknowledge that there are a number of critical elements that help ensure effective stakeholder engagement and participation. The Murray Darling Basin review discusses these in relation to the stakeholder engagement, practice change and institutional settings and structures. Effective stakeholder engagement required elements such as determining the appropriate level of engagement and the acknowledgement of the different types of knowledge (community and scientific) and how these can effectively inform each other.

In the seafood, or fishing, industry, there is very little information available on what are considered to be effective engagement strategies and as such this report begins to form the basis for understanding the best ways to engage with the fishers from their perspective.

What is Engagement?

There are many models of consultation having multiple levels, ranging from government or an organisation tells, industry or members listens; through to government or organisation asks, industry or members tell, industry or members decide, industry informs government or members inform the organisation, industry or members then act.

Engagement is the pinnacle of community and/or stakeholder participation but it is very difficult to achieve (Aslin & Brown 2004). Aslin & Brown (2004) define the community participation process as a step wise

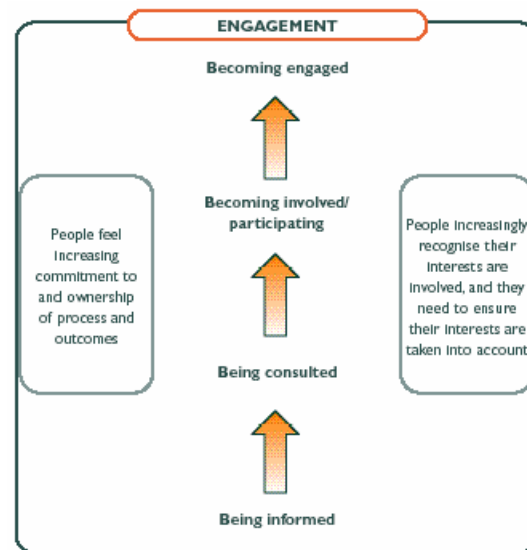


Figure 1: Different stage of stakeholder/ community participation (Aslin & Brown 2004)

process: *consultation*; *participation* and *engagement* (Figure 1).

The simplest level of stakeholder participation is through a *consultation* approach where one group seeks to advise or obtain advice / information from another group. However, it does not follow that the advice or information obtained will be used. Many in the fishing industry see '*consultation*' particularly when undertaken by Government as a 'done deal' with very little evidence that the stakeholder input was taken into account.

In contrast, *participation* is the active involvement of the person / people in the work and issues. *Participation*, although it generates active involvement, does not generate the same level of commitment to the issues and actions as *engagement* does.

Finally, *engagement* is the process by which stakeholders commit to a predetermined process that has clear decisions and actions resulting from the decisions. *Engagement*, unlike *consultation* and *participation*, occurs when a person places sufficient importance on the subject being discussed causing commitment to the subject and the actions.

Aslin & Brown (2004) also consider that it is important to note that although a person or group of people may participate and provide advice and information, they may remain unengaged, particularly where they see themselves as disempowered or over ridden. However, *engagement* is a powerful way of implementing change and empowering the group to adapt, but it can be extraordinarily difficult to truly engage people in matters affecting them, let alone on issues of public good.

Methods of Engagement

Effective engagement can, and has occurred, in a range of the community areas. Some Natural Resource Management regions have developed quite strong methods to engage with their community and there are some excellent publications on collaborative programs, for example *Co-create* (Robinson 2005). In the fishing industry the Indigenous Land Use Agreement (ILUA) process is probably the best example of effective engagement. Unlike other fishing industry processes, for example management and scientific research, the South Australian industry at large considers the ILUA process is an effective process that delivers robust outcomes. Using the definitions described by Aslin & Brown (2004), the ILUA process is 'engagement'.

The ILUA process established a specific framework for stakeholders to work within. The framework was negotiated with all groups from the outset thus providing 'a predetermined process' for all future activities and discussions. This cooperative model for developing negotiated outcomes between the native title claimants, industry and government is believed to have effectively engaged each of the groups as they all placed 'significant importance on deriving robust and equitable outcomes' and therefore were committed to the discussion and results. Key principles for all stakeholders were established and agreed to at a state wide level that allowed specific issues pertaining to fishing to be discussed at the appropriate time and within the predetermined boundaries. This also means that only those with an interest in the matter discussed the issues. Having a specific

group of stakeholders around the table is imperative to deliver outcomes effectively.

The ILUA process has worked primarily because it clearly delineated and acknowledged the rights of each sector: commercial, cultural, and recreational. This provided certainty that allowed each of the groups to engage. All parties were there in the spirit of 'negotiation' where all were seen as having equal rights at the discussion table. The ILUA process also has willing partners (MacDonald 2006). Unlike other government processes pertaining to the fishing industry, the ILUA process achieved balanced agreement through discussion and compromise with all stakeholders: outcomes were negotiated.

Although changing, the traditional 'consultation' approach where government 'tells', remains in place within many processes at the local, state and federal government level. For example water management, coastal development, and mining tend to use this style of 'consultation', although there is a push to more co-operative approaches, for example through the fisheries co-management framework (FRDC 2008). One lesson learned from the ILUA process is that in order to achieve lasting outcomes, it is important to achieve certainty that meets the needs of all parties. Rather than having delegated roles and responsibilities, the ILUA sought to have agreement from all throughout the process (MacDonald 2006).

ASSOCIATIONS

The role of stakeholder associations is seen to be - represent the views of members and to promote their interests. Members will join associations for any number of reasons and they will remain with an association because they gain some benefit from it, whether it is perceived or real. Associations largely see their core role as seeking to secure or preserve the interests and rights of their members. Key activities for associations were identified in the survey as being to represent industry on a range of issues; these varied depending upon the level of association. Issues associated with marine parks and conservation issues were seen as significant at all levels but more a particularly at a local or sector level, while issues such as political representation and negotiating with government were higher priorities

Associations and/or unions have historically been pivotal for the workforce, most recently throughout the 1970's where compulsory unionism and collective bargaining coupled with and greater employee homogeneity (fulltime, set hours, holidays and pay) ensured a strong voice for the workforce (Peetz 2001). When engaging with stakeholders, it has been important to recognise their representative associations and to work with them. However association and/or union membership has steadily declined in the past 20-30 years, making engagement with individuals and bargaining by groups more difficult.

Declining membership is systemic; throughout Australia there has been a decline in traditional unionism (Leigh 2005). Since the mid 1980's there has been a decline from 50% employee union membership to 26% in 1999 (ABS Cat No 6310.0 & 6325.0). Leigh (2005) also acknowledges that this pattern is not unique to Australia; in fact it can be seen throughout the developed world but is possibly

most pronounced in Australia and New Zealand. With declining union membership and declining representative organisations, it has been critical for organisations to assess their effectiveness given the changing nature of the Australian workplace. Holland and Hanley (2002) describe the long-known need for change within the ACTU, but this has not occurred and, as a consequence, membership continues to decline.

The Australian Bureau of Statistics has identified union membership in 2008 at 19% of those in their main job – 1.8 million relative to 1.7 million in 2007, a 3% increase. The increase is attributed to growth in the workforce. The growth in numbers of union members was the first increase in numbers for three years. There was an assessment that, those that start to feel more insecure about their job they may see more of a role for unions.

Industry representative bodies have also failed to critically assess their own effectiveness. This is particularly true for the seafood industry in an environment of declining participation through restructuring and rationalisations. It is imperative that all groups have strategies for 'continual improvement'. There are a number of fishing industry sectors or groups that are of the view they are under increasing pressure to maintain their position, yet very few of those chose under voluntary systems to fund their sector or representative bodies. As an example South Australia's Marine Fishers Association represents the interests of over 350 fishers (down from over 500 in 1997) to government, yet it attracts less than 30% membership from licence holders. During the period of decline in licence numbers the industry has gone from a secure funding regime through contributions collected from all licence holders under their licence fee to one of voluntary funding.

There were only sector two associations that have total licence holder membership in those surveyed – SA Blue Crab Pot Fishermen's Association and the Spencer Gulf an West Coast Prawn Boat Owner's Association. At a state or peak body level both the Western Australian and Tasmanian industry council's have 100% based upon a compulsory funding model, while in South Australia and New South Wales they are dependent upon voluntary funding. In South Australia over 400 of the State's more than 800 licence holders are not members of their sector or state association.

Associations in Fishing Industry

The fishing industry had strong associations historically, but like all other associations, has observed a significant decline in uptake of voluntary membership by fishers, their partners and crews in those bodies that extend their membership beyond the owners and producers. This has resulted in a complete collapse of some associations and a partial collapse in other Australian fishing sector bodies. For example the national seafood industry body, the Australian Seafood Industry Council (ASIC) collapsed with an inability to adequately fund itself. In South Australia, the individual industry sectors parted company over a decade ago primarily due to disparity between the different sectors and only recently has been re-established as a single body representing all of the sector interests. Currently in Western Australia there has been a growing dissatisfaction among some fishers with associations at different levels which has lead to organisational review for some.

Although there has been declining membership, especially under voluntary funding regimes, and the complete breakdown of some associations, it is important to note that neither the fishers nor the associations have critically assessed the reasons for the breakdown or how to overcome it. In order to improve outcomes for the industry generally, it is hoped this report will begin the process of re-evaluating the nature and role of industry associations. Finally, it is also important to note that very few Australian fishing industry associations, if any, are currently growing in membership (pers. comm. N MacDonald), this is attributed to declining numbers of licence holders in all jurisdictions, particularly where there is compulsory levies or fees or in the absence of compulsory funding making it difficult to build membership levels. In order to be more attractive to fishers voluntarily funded bodies need to assess improvements in industry association performance to demonstrate their value and benefits to fishers.

Fishing industry associations were established as a way for individual fishes to come together in a collective way on matters that were affecting them as individuals. Historically this pertained to effective resource management. Fishers implemented some self regulation such as spatial and temporal closures or limited entry. As the industry progressed and management developed, there was a greater need to partake in government negotiations on matters such as scientific research and resource management methods. More recently, associations, such as those in jurisdictions associated with the southern rocklobster or abalone fisheries, have begun to work together on marketing, regulatory, compliance and resource allocation issues. Some fishers recognise that there is a need to work together as a collective group to ensure a long term future for individual businesses. But for the most part, where there is no compulsory funding process, there is a failure to fund and therefore recognise the need to support associations or recognise their benefits hence declining membership and engagement of grassroots fishers in associations.

PRIMARY PRODUCERS

Plowman (Plowman 2003, 2004), through his research work in Queensland, has investigated reasons some primary industry groups continue to grow and flourish while others do not. The research, which couples organisational psychology with individual differences in personalities, innovation and continual improvement, is outside the traditional research areas in fisheries, but it makes very clear observations about primary producers that may have positive implications for the fishing industry if implemented.

Plowman (2004) following the investigation of six different primary industries, highlights the factors that the successful sectors shared. He outlines the following key ingredients:

1. Participation of youth – to help maintain new, innovative ideas and energy.
2. Adopting a 'service' approach to marketing – delivery of a highly dependable product of consistent quality that meets the needs of the consumer rather than the producer. Service characteristics include quality, quantity, timing, and price, all as a packaged service.

3. Continual research and learning – successful primary industry groups are continually seeking knowledge and ideas both from within the sector and also beyond it from non-traditional sectors.
4. Financial commitment – to the association for industry development. This is suggested to be a condition of membership within the sector. *This industry is our business* is the mantra.
5. Uniform systems to ensure quality – produce specifications and a disciplined production and cost systems. Avoid commodity based thinking rather aiming for quality differentiation and service thinking.
6. Share responsibility with many – ensure broad distribution of responsibility and develop management structures that support this. Management needs to be diverse with a range of expertise. Avoid reliance on consultants, paid staff and external funding.
7. Define goals – the industry needs to clearly define the goals and core issues for the organisation. The goals should have a long term and customer focus.
8. Invest in science – the most innovative rural industries fostered and funded research and development to help overcome present challenges and provide competitive advantage for the future.
9. Involve everyone – the innovative industries recognised the importance of involvement of youth, of members with a 'can-do' approach, those that were well educated and those who were comfortable with technology. There was also recognition of the importance of developing a culture that fosters diversity, flexibility and turnover of leadership which allowed for the discovery of talents within the membership base and thinking 'outside the box'.
10. Recognise and value the rewards – innovative industries also need incentives for innovation. These would include both financial rewards and satisfaction in overcoming challenges and problems. Plowman suggests that innovative industries attract successful people that pursue both rewards and challenges. There need to be inherent rewards from belonging that do not accrue to non-members.
11. Talk to everybody, often – frequent multidirectional communication is critical to the successful primary industry. The communication is not only within the organisation but also with all other stakeholders and customers.

In contrast, the fishing industry has limited participation of youth as there are not many young people in the industry. The industry primarily uses a commodity based approach to marketing, supplying to wholesalers as a whole green or whole cooked product. The fishing industry has learning programs and opportunities available, for example through the FRDC People Development program, but a learning culture remains elusive from an enterprise level. The national conference, Seafood Directions and the Australasian Aquaculture Conference, has never enjoyed strong grassroots support.

There have been numerous attempts to create industry development structures, most recently with Seafood Experience Australia (SEA) but a consistent structure has failed to secure funding and therefore fails to provide opportunities for industry development. Some sectors of the fishing industry have created quality assurance systems, such as the 'Clean Green' program for Southern Rocklobster

Limited (SRL). However, these have not always been widely accepted by individual businesses, making the standard less weighty.

Participation at national or state fishing industry forums is a great opportunity to reacquaint with colleagues – they are not necessarily opportunities to meet new industry members. This is because invitations and opportunities are held with a small number of people within the industry. Responsibility is shared with few, not many. The fishing industry is often reacting to a number of issues simultaneously: being in a reactive cycle with limited resourcing means that there is little time for goal setting and proactive planning for the future.

The fishing industry does invest in science. However, research and development remains fairly conservative, driven not only by the fishers but also by the needs or wants of other stakeholders. Whilst not negating the need for input from other organisations and agencies, current R&D investments may not be meeting the needs or expectations of the primary producers - fishermen as they are likely not to have had direct input into the discussion and planning for future needs.

The fishing industry does not strongly support innovation and it is generally slow to adopt or support changes in management or fishing practices. Younger members or those with a different opinion may feel powerless to have a say or put forward new ideas within the fishing industry, leading to frustration and resulting in the same concepts and plans being continually reinvented as 'new' solutions for the industry.

There is little or no reward in the fishing industry to promote or foster change within industry organisations. The fishing industry talks consistently amongst itself, but it is likely the conversation is negative and is most likely not held with others from other primary producer industries thus limiting access to information on innovation or improvements.

Fishing Industry Demographics

Average Age: The fishing industry is typical of other primary producing sectors. Fishers, like agricultural sectors, are dominated by older males with an average age of 48 (SkillsInfo 2007; Pers. comm. M Cody), although individual sectors have recorded high average ages, for example the SA marine scalefish fishery has an average age of 55 (Schirmer & Pickworth 2005). Recent South Australian research confirms the national ABS data that the average age of fishers in South Australia falls within the 45-54 age group (van der Geest & MacDonald 2008).

Education: Education levels of fishers are also lower than the general population. van der Geest and MacDonald (2008) report that the majority of fishers only completed part of secondary school, with very few fishers completing secondary and/or tertiary education. Vocational training is largely undertaken to meet statutory requirements for sea going qualifications.

Time in industry: Fishers remain working in the industry for long periods of time, with an average longevity of 22 years. However, there is a shift taking place with a greater number of new entrants to the industry, with the changes to management arrangements making it more attractive to investors and as a part

time occupation. It is likely that this is the same for other Australian states and territories.

The proportion of income derived from the fishing industry is also typical of other primary producing sectors. Nearly 70% of respondent in the training needs analysis undertaken by van der Geest and MacDonald in 2008 completed in SA suggest that 75-100% of their income comes from the fishing business alone.

The types of people working in the fishing industry are of vital importance to the formation and functioning of the industry associations. The relationship between fishing industry demographics, personality types and government processes is likely to have a considerable influence on the structure and functioning of the industry associations.

CURRENT METHODS OF ENGAGEMENT

There were 15 associations surveyed in four (4) States as part of this project, each has different methods of communicating and engaging with members. This section provides a summary of the current methods of engagement used by associations. The information is general rather than being prescriptive and/or definitive about each of the associations, but is probably quite typical for the Australian fishing industry. The information was collected on a survey (refer Appendix 2) through personal communication with associations.

Associations are run with a number of executive positions. For most associations the executive positions are filled with members of the association; i.e. fishers. They are voluntary positions, although there are some associations that aim to reimburse the costs of travel and if possible pay a sitting fee to these members for their services and also for the lost fishing time. There are a small number of associations that employ independent experts to fill one or more roles in the association. The independent role is generally as an independent chair or an executive officer; however other experts have been engaged in some associations for specific purposes or roles. Elected executive positions, irrespective of being independent or not, generally have a prescribed period of time, normally two years. However some associations have one year terms and another a three year term. What is interesting is that there was only one association that had a fixed number of terms in its constitution the rest permitted an unlimited number of consecutive terms for executive positions.

It seems that most associations are funded primarily through membership fees alone. Some of the more organised associations are also utilising government grants to help support the association. There were very few associations that had alternative funding mechanisms, such as external income or a share of production revenues. This is important to understand as it means that:

1. Most associations are relying on membership fees only, i.e. a small budget, to run the Association. Unless there is strong membership, an association's ability to achieve anything for the members or its sector generally is limited, as is their ability to engage members and/or with the management process;
2. There are only a limited number of government grants available. Mostly they are for 'primary producers', and it is often not clear whether fishers are

eligible applicants. Grant applications are also becoming increasingly difficult to prepare, requiring additional support and/or consultation with a range of stakeholder groups. Moreover, some agencies and other primary industry groups have human resources to assist and/or prepare the applications on behalf of their industry commodity groups. For example, the national Natural Resource Management strategy provides significant human resources to terrestrial primary producers through 'Landcare'. In comparison, the equivalent resourcing for the seafood industry is one 'SeaNet Extension Officer' for the entire South Australian State wide industry;

3. Some alternative innovative funding strategies require strong support from members and thus it becomes a 'chicken or egg' scenario: associations need funding to deliver outcomes, but the association's ability to deliver outcomes is diminished because of the lack of membership. However, some fishing industry associations have raised funds to support their activities and deliver outcomes for their members through the sale of product from annual research; sale of research collected on the habitat or species of conservation interest within the fishery; and fee for service arrangements with government agencies.

Given that association budgets are likely to be limited it is not surprising that most associations have at best part time executive officer support for the Board. There are very few associations, (only two of 15 in this survey), who employ a full time executive officer. There were a greater number that have part time support. These people are there as advocates, facilitators and negotiators for the industry sector paying for the service. Some people fill multiple positions, resulting in a considerable workload. Some of the State (peak body) associations also provide executive officer support for smaller associations. There are some (four) associations at a sector level that have secure funding, often with considerable budgets, but choose not to employ full time support. However, for most associations, funding and support are limited and therefore activities on the ground are limited as is the capacity to influence change or progress the sector or industry.

All associations share similar roles: advocacy and representation. Whether there is paid support or not, the range of issues facing the associations is lengthy, but clearly without paid support and/or access to expert assistance, the ability to deliver outcomes to members, though not impossible, becomes more difficult. There was only one association that provided other services to members which relates to the structure of the association as a co-operative. The key issues which associations are dealing with included:

- fisheries management;
- fisheries science;
- marine protected areas or marine parks;
- desalination plants and infrastructure;
- secure access to the resource;
- profitability of the businesses including marketing;
- industry and product promotion.

The associations generally utilise traditional types of communication methods: letters, meetings, newsletters and phone calls. Some associations had been

trailing alternative strategies including SMS and email. However, this is unlikely to reach all fishers. Hence traditional communication methods remain the only way to ensure that all licence holders are reached. The traditional communication approach is necessary where there is no secure funding, but the association is required to communicate with all licence holders as part of the management process, as there is no obligation for licence holders to provide information to those groups. There are very few associations that use innovative web based technology as a means of communicating. This state of affairs is likely to relate to the age demographic of fishers, to their uptake of new technology and also their literacy and computing skills. For some associations, communication is structured to align with the state association's communications. Others form their own specific timetables for communication. For most associations, communication to all licence holders or members is three to four times per year. However, there are association that communicate with members weekly. Also an individual's role within the association is a factor in the frequency of communications. Those with executive roles are likely to hear from the association much more frequently than general members.

Policies and Programs

"Making more effective use of the resources and skills of the community in general and the scientific community in particular" is a stated object of the Commonwealth Government Primary Industries and Energy Research and Development Act 1989. The Fisheries Research and Development Corporation (FRDC) is the key group to implement this legislation for the seafood industry and is administered through Program Three of the FRDC's research and development plan 2005-10, the People Development Program (Fisheries Research and Development Corporation 2005). Although 'people development' has been on the Government and FRDC agenda for many years, investment in people has gathered momentum in the past few years as there has been a stronger recognition of this need to ensure the long term viability of the industry.

A planned outcome of the people development program is that *"the knowledge and skills of the people in and supporting the Australian fishing industry, and in the wider community, are developed and used so that Australians derive maximum economic, environmental and social benefits from the fisheries research and development"*. To this end, the FRDC has two key research and development challenges in Program Three:

- People development – develop people who will help the fishing industry to meet its future needs (Challenge four of the FRDC Research and Development Plan 2005-10); and
- Community and consumer support – increase community and consumer support for the benefits of the three main sectors of the fishing industry (challenge five of the FRDC Research and Development Plan 2005-10).

With acknowledgement from the FRDC that the people development program was not sufficiently meeting its stated objectives, a rigorous assessment and recommendations for future investment was prepared (Evans and Johnstone 2006). This review provided a number of recommendations for the FRDC regarding the ongoing development of industry. Capacity building at local and regional levels was seen as a critical people development need, as was the need to work in a cooperative and/or team based approach. Moreover, the review

suggests the fishing industry would be well placed to develop a strategic approach to the people development program supported by a thorough operational plan (Evans and Johnstone 2006).

The resulting operational plan "*People Development Program 2008-2013*" (Ruscoe 2008) was released in 2008. This plan sets out specific objectives, drivers and strategies to meet the people development challenge (above). Ruscoe (2008) highlights five key objectives each with numerous actions to be initiated by the FRDC during this period:

1. Enhance industry leadership;
2. Build capacity to drive change to achieve goals;
3. Encourage knowledge transfer and research and development adoption;
4. Build workforce capability; and
5. Recognise and promote achievements.

The development of industry capacity is a critical component of the people development program. To ensure that fishers in regional Australia are aware of and can therefore take advantage of the many opportunities available to them strong communication networks throughout the fishing industry are essential.

NEED

The wildcatch fishing industry throughout Australia is declining in number, but more alarming is the significant decline in fisher participation in representative bodies. The declining membership of fishers in representative bodies is undermining the success of the industry in business and political arenas.

Launched in February this year, Wildcatch Fisheries SA (WFSA) was established to re-unite the South Australian wildcatch fisheries under a single representative body. The organisational structure has a Council of representatives of the 13 fisheries (including commonwealth wildcatch licence holders) and a Board of Management providing for three Councillors and three independent Directors. Membership is based on individual voluntary membership of licence holders.

Although all industry sector associations and individual fishers strongly supported the development of WFSA, there has been only limited uptake of individual voluntary membership. The Council and Board unanimously identified that understanding the reasons for lack of engagement by fishers to the layers of representative bodies was a critical development priority for the organisation and the industry. The WFSA Councillors and Directors, along with the sector association executive, are aware that the ongoing success of the wildcatch fishing industry is through service delivery, advice and representation on a range of statewide issues the best placed group to deliver these outcomes is the State representative body.

Although industry leaders are aware of the importance of representative organisations, individual fishers remain apathetic and uncommitted to join their sector or state representative bodies. To develop a strong and secure seafood industry at a sector, state and national level, we must understand the mechanisms driving the individual's decision not to join these organisations.

Moreover, we need to clarify the individual's needs and expectations so that strategic and business plans are tailored to deliver tangible, long lasting benefits to the industry and therefore members.

OBJECTIVES

It is important to recognise what drives fishers to join and participate in industry associations, and more critically to understand the reasons why others remain disengaged from the industry. The project should assist in understanding fisher thinking so that effective measures can be implemented to build their capacity to overcome economic, environmental and social challenges facing their industry.

Understanding the reasons why fishers do or don't engage with representative associations is critical to the success of the industry. A single united voice has a greater capacity to influence change than lone voices. A message is substantially weakened when there are conflicting voices from individuals or groups within the fishing industry. Strong associations have a greater capacity to affect change and ensure desirable outcomes within their own sector in areas such as management, science, negotiation and product marketing.

Moreover, engagement (or lack of engagement) by fishers in associations may have serious ramifications for the ways in which government policies and programs and ancillary support services are conducted within the fishing industry. Currently government funding, research and development opportunities are considered on a sector by sector basis. Perhaps a different approach is required for progressing the fishing industry, where there are many changes currently occurring, particularly with a move to a greater emphasis on co-management which requires a unified industry sector for success.

To this end the specific objectives for this project were to:

1. Understand the drivers for why people choose to join, or not join, an association where there is voluntary membership of representative fishing industry organisations;
2. Understand the issues affecting membership of representative organisations;
3. Assist sectors to identify and develop guiding principles that enables strong membership for representative organisations; and
4. To identify strategies to build organisational capacity to provide and demonstrate value to members.

RESEARCH METHODS

Steering Committee

A project steering committee was established upon signing of the contract with FRDC. A request for members of the steering committee was sent to all South

Australian association executive officers and key industry representatives with three people responding positively. The Steering Committee's role was to oversee the development of the survey and to ensure that the project met its stated objectives more generally. The Steering Committee consisted of the following experts:

- Neil MacDonald – WFSA General Manager and Chair of the Committee as Principle Investigator of the project;
- Michael Tokley – Executive Officer Abalone Industry Association SA (AIASA), South Australian Southern Rocklobster Advisory Council (SARLAC) and National Abalone Council;
- Tracy Hill – Secretary Southern Fishermen's Association (SFA);
- Michael Fooks – President Marine Fishers Association (MFA);
- Jo-Anne Ruscoe – Manager People Development Program FRDC;

In addition to the steering committee, experts from the Western Australian and Tasmanian State representative organisations along with each sector association in these States together with the Clarence River Fishermen's Association were all utilised to help ensure integration of the project into these other State fisheries. Their participation was also critical for the successful collection of the data. Each of these groups was eager to participate in the project, recognising the need to critically review the operations and activities of the associations for the benefit of the fishing industry generally.

Identification of Participating Sectors

The proposal was developed by Wildcatch Fisheries SA to primarily survey South Australian fishing sectors. The main reason the research was proposed was in order to understand declining participation and membership for a number of SA fishing sectors. This problem was highlighted with the development of the new State representative association which under a voluntary funding framework failed to attract strong membership following two years of consultation leading to its establishment.

FRDC's People Development program steering committee suggested broadening the scope of the research to sectors outside South Australia. With this feedback, WFSA sought to engage with fishing sectors in Western Australia (WA) and New South Wales (NSW) through the State Bodies or directly with the associations. Advice provided helped to steer the research to a specific fishery. These States were chosen as they were seen to be at either end of the spectrum of the engagement process: WA with a strong State association could help to engage with a specific sector that was not engaging well – The two southern WA Shark Fisheries: the West Coast Demersal Gillnet and Demersal Longline Fishery and the Joint Authority Southern Demersal Gillnet and Demersal Longline Fishery, were surveyed as the WA "Shark fishery". The WA managed fisheries share a number of participants with the joint authority fishery, but they are not necessarily duplicated. For the NSW industry, without an effective State association, the program sought to engage with one sector that was perceived to have a strong association and fishery – the Clarence River Fisherman's Association. The Clarence River association represents five discrete fisheries: the Estuary General Fishery for the Clarence; the Estuary Prawn Trawl; the Ocean Haul, the Ocean Trap and Line and the Ocean Trawl fisheries.

In addition to these principal fisheries, the project also sought to engage the Tasmanian Commercial Dive Association with advice from the Tasmanian Seafood Industry Council (TSIC). By engaging these associations, the research also collected information from a number of other sectors. This was due to multiple licence holders across State jurisdictions and/or fisheries, for example a Tasmanian licence holder with interests in another Tasmanian fishery and another fishery in NSW. Although the project has utilised results from these specific fisheries, they are not specifically mentioned for privacy reasons. Finally the WA Beach Seine Fishery results were included as an opportunity to attend their 2008 AGM provided an informal way to collect thoughts from the majority of the licence holders in that fishery.

The resultant target groups for the research were:

- NSW Clarence River Fishermen's Association
- Abalone Industry Association SA
- SA Blue Crab Pot Fishers Association
- SA Surveyed Charter Boat Owners Association
- SA Gulf St Vincent Prawn Boat Owners Association
- SA Commonwealth Licence Holders (SBT Association and the Great Australian Bight Fishermen's Association)
- SA Spencer Gulf and West Coast Prawn Boat Owners Association
- SA Lakes and Coorong Fishers – Southern Fishermen's Association
- SA Marine Scalefish Fishery and Miscellaneous Fishers – Marine Fishers Association
- SA Northern Zone Rocklobster Fishermen's Association
- SA Sardine Boat Owners Association
- SA Southern Zone Rocklobster Fishery - South East Professional Fishermen's Association
- Tasmanian Commercial Dive Association
- WA Shark Association
- WA South Coast Beach Seine Fishery

Figure 5 shows the number of licence holders for each of these fisheries and the participation rate in the survey for each group surveyed.

THE SURVEY

Wildcatch Fisheries SA utilised "Survey Monkey" (www.surveymonkey.com) to complete the project. Survey Monkey is an online survey development and collection program designed to assist the collection of survey data. WFSA used Survey Monkey to design the survey layout using templates. Survey Monkey also provides various data collection methods including a web link for online survey completion and a printable version which can then be manually entered into the software. Survey Monkey also collates the data into a spreadsheet for analysis.

Survey Development and Testing

The survey questions were brainstormed and developed based on background reading and experience of the WFSA team. The survey questions were provided to the Steering Committee prior to the first meeting for comment and discussion. Robust discussion ensured that the second draft of the survey was ready for testing with licence holders. Following testing of the survey with twenty fishers,

only one modification was made to the survey: the addition of a question. With the testing complete, the survey was approved by the Statistical Clearing House and ready for release to the industry sectors. A further change was made, with the addition of one further question, once the first group of fishers was surveyed. A copy of the survey used can be found in Appendix 1.

Data Collection

WFSA set out to achieve a response rate of 30%. A response rate of this proportion is considered to be a good response rate for social surveys providing robust and rigorous results (Pannell & Pannell 1999). WFSA considered the target tough but achievable (given the project milestones and deadlines and the target audience) while ensuring statistical rigour and robustness of the conclusions drawn and therefore in the recommendations made.

Considerable effort was put into the collection of the surveys as it can be difficult to engage with fishers: as more often than not they are fishing. The authors also worked with the State and specific local association to contact licensed fishers. In all instances each licensed fisher would have received at least two contacts and in many cases three. Many licensed fishers, with whom a message was left, failed to return the call. Tasmania had the worst return phone call rate: following the travel to Hobart all licensed fishers were called twice, but none of them returned the call. Licensed fishers that received the survey in the mail did not complete it and the survey link sent to email addresses of some licensed fishers was also not completed online. Many licensed fishers didn't even respond to the emails or correspondence sent directly from their local association.

The data was collected using a number of different methods. Collecting surveys from fishers can be extraordinarily difficult. Moreover, privacy legislation can often mean that associations only have access to mailing addresses. Casement *et al* (2006) noted that the best engagement method for fishers was face-to-face interaction in smaller groups with a known and trusted or highly competent facilitator. Owing to the previous experiences of the authors, WFSA sought to learn from past experience and as such this survey utilised as many different data collection methods as possible. The methods used were:

- Email – where email addresses were available, a direct link to the online survey was provided. The same introductory information was provided in the email along with the link.
- Mail – a copy of the survey, along with an explanatory letter, was mailed to all licence holders in each of the jurisdictions participating in the study, except NSW (see below).
- In person – extensive travel was completed as a part of the project [WA (Esperance and Albany); NSW (Macleay and Illuka); Tasmania (Hobart); SA (Mount Gambier, Yorke and Eyre Peninsulas)] enabling specific sector or regional targeting in one-on-one interviews. Although time consuming, completing surveys face-to-face was found to be the best way to meet with disengaged fishers. The face-to-face sessions also allowed greater discussion of the issues, therefore providing greater depth to the interpretation of the results. For some regions, for example the Clarence River Fishermen's Association, the far majority of the data was collected face-to-face.

- Phone – interviews were also conducted over the phone. Phone interview, like the face-to-face interview, provided a greater depth to the survey responses provided. It was also excellent for follow up and/or providing clarification to respondents as required.
- Through Associations – as previously stated, WFSA worked with other State associations and specific sector associations being targeted through the project to assist data collection. The response of each of the associations was excellent. The assistance and support of these associations, particularly outside SA, was paramount in ensuring collection of the data from these sectors.
- Attendance at Association meetings – the WFSA team also attended association meetings were possible to collect surveys from those fishers in attendance or to have a discussion with the fishers about the topic in a group interview.
- Specific Meetings – a series of 6 meetings were also conducted in South Australia with the specific aim to elicit responses to the survey and to generate industry interest in the project.

However, even utilising the many data collection methods outlined above, WFSA acknowledges that the project is likely to have surveyed a greater proportion of 'engaged fishers' and that therefore the results are biased toward those fishers already engaged in the associations and the industry more broadly. Mail was the primary method used to try to engage with fishers, and if the fisher chose not to respond there were few alternatives for engagement by WFSA.

RESPONSES

Considerable effort was put into the collection of the surveys: travel to key locations (Albany, Esperance, Mclean, Ilkua, Hobart, and throughout SA), attendance at meetings, phone interviews, and hard copies of the surveys mailed to licensed fishers.

It can be difficult to engage with fishers: as more often than not they are fishing. This was already known; hence the vast number of methods utilised to engage the licensed fishers for this project and the extended surveying period of 2.5 months. Surveys were mailed to all (1,227) of the known licensed fishers in the participating sectors. The author also worked with the State and specific local association to contact licensed fishers via email, phone or in person. In all instances each licensed fisher would have received at least two contacts and in many cases three. Many licensed fishers, with whom a message was left, failed to return the call. Tasmania had the worst return phone call rate: following the travel to Hobart all licensed fishers were called twice, but none of them returned the call. Licensed fishers that received the survey in the mail did not complete it and the survey link sent to email addresses of some licensed fishers was also not completed online. Many licensed fishers didn't even respond to the emails or correspondence sent directly from their local association.

ANALYSIS

The data was analysed using descriptive statistics in Microsoft Excel™. Survey Monkey also provided summary information of the data including the number of

respondents and the number of people that skipped particular questions. The information was able to be sorted by sector allowing for inferences and recommendations to be made for these sectors. It is important to note that, as many of the surveys were completed in an interview style either over the phone or in person. A greater volume of qualitative information was able to be collected from many of the respondents.

Preliminary results were presented to the Steering Committee at the third meeting in early February 2009 for discussion and comment. It was important that the expertise of the Steering Committee was utilised when interpreting the results and making recommendations. This information and expertise were incorporated into the project results.

RESULTS AND DISCUSSION

The results and discussion are covered together to aid readability of the report. Summary points are provided at the end of each section to aid comprehension.

RESPONDENT PROFILE

Age-Gender Profile

Of the 245 respondents, most respondents were males aged 45-54 (82 responses) with the 35-44 and the 55-64 age groups with 55 and 56 respondents respectively. At either end of the age-gender profile the response rate declines dramatically: only 2 respondents were recorded for ages 15-24, 14 responses for ages 25-34 and 23 responses for the 65+ age group (Figure 2).

The female respondents fell into the age groups: from 35-44 upwards. The responses were 2, 4, 3 and 4 respectively. As previously stated, all female responses are from SA postcodes (Figure 4).

The age-gender profile of all surveyed respondents (Figure 2) closely aligns to the age-gender profiles recorded in other research for the fishing industry. The SA Training Needs Analysis (van der Geest and MacDonald 2008) demonstrated that the fishing industry was dominated by older males. The Social Impact Assessment completed for the SA Marine

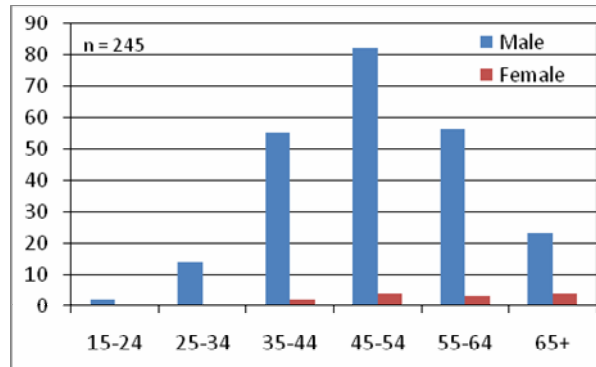


Figure 2: Age-Gender profile of survey respondents (n = 245).

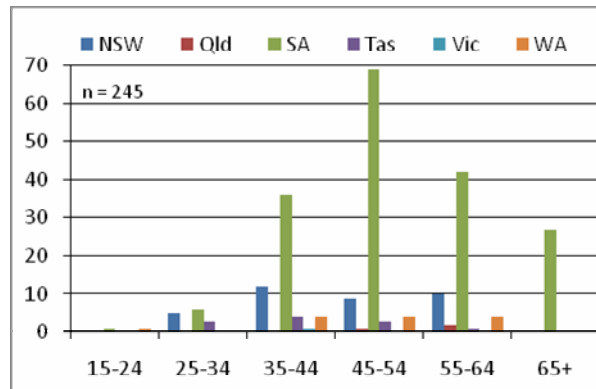


Figure 3: Age profile recorded for fisheries by State (n = 245).

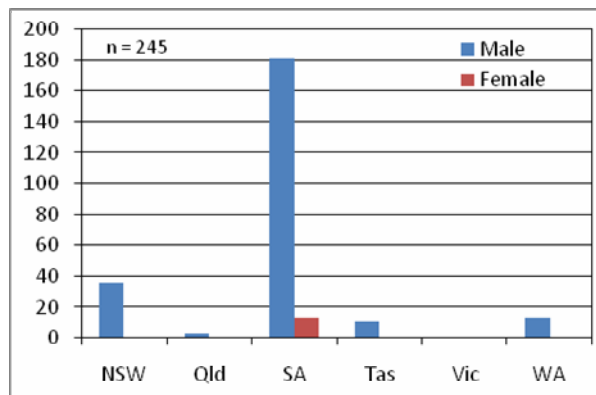


Figure 4: Responses by gender for each of the States

Scalefish fishery (Schirmer J and Pickworth J, 2005) recorded an average age of 55 for the sector. Demographics for the Australia workforce also demonstrate that there are proportionally more primary producers in the Australian workforce from ages 35 to over 65 (SkillsInfo 2007). Those fisheries from outside of South Australia participating in the survey also recorded a greater proportion of older males (Figure 3). The age profile for the New South Wales and Tasmanian fishers was slightly younger than that for South Australia and Western Australia. However, the results are not as reliable due to the smaller number of respondents from these sectors.

Of the 245 respondents only 13 females were recorded and all from South Australia (Figure 4). This result was not unexpected. Licences are generally held in the male name and information is generally sent to the licence holder rather than the partner.

The participation of women is interesting as South Australia is also the birthplace of the Women's Industry Network which was developed to engage and empower women of the seafood industry. It is thought that a woman's interest may increase with age due to reduced family commitments allowing more time to be invested in the business and therefore the industry more generally. The results for the women are not unexpected. The State and National women's associations are relatively young, have not enjoyed wide membership and have also struggled to maintain memberships in recent years (pers. obs.).

It is important to consider the respondent age-gender profiles when interpreting the survey responses. Previous research has shown that older age groups in the fishing industry have lower education levels (van der Geest & MacDonald 2008). A third of the respondents for this previous research were 45-54 year old males. More than 70% of those respondents only partially completed secondary school as the highest level of education. Moreover, primary producers, like older people, are also more likely to be conservative by nature (Plowman, 2004). Thus, the types of responses to specific questions and the type of fishers that responded to the survey all help to explain the nature of participation within fishing industry associations.

Key Messages

- The survey respondents were a typical age-gender profile for the fishing industry, dominated by the 45 -54 age group.
- There were only 13 female respondents, all from South Australia.
- Older males, particularly fishers, have a low overall 'highest level of education'.
- The relationship between age, gender, and education are likely to influence the way the fishers interact and relate to their associations.

PARTICIPATING GROUPS

What fishing sector(s) / fishery do you participate in?

A total of 1,227 licences were surveyed comprising all fishers in 15 fisheries. The information collected is shown together with the total number of licences in the

sector and/or fishery¹ (Figure 5). The survey was responded to by 243 licence holders, or 20% of licence holders representing 313 licences. The number of licences in the fishery or sector is shown in blue and the number of responses from each sector shown in red. Overall, the response rate was lower than the original target of 300 surveys or roughly 30%. The survey was responded to by 243 licence holders, or 20% of licence holders representing 313 licences.

The three highest levels of participation were the South Australian Abalone, South Australian Blue Crab and WA Beach Seine fisheries recorded significant response rates; 90.9%, 88.9% and 63.6% respectively. The Spencer Gulf and West Coast Prawn Boat Owners Association has 100% membership of the fishers in that fishery and was one of those that met the target response rate with 31%.

Each of the sectors, with the exception of those above, had proportionally similar response rates from licence holders; all recording less than 30%. The lowest response rate was recorded in the Gulf St Vincent Prawn fishery of 10.0% and the Southern Fishermen's Association from the Lakes and Coorong Fishery, 11.1%.

One reason for the low response rate may be related to how to complete the survey. Some fishers told the author that they "thought the survey was too complex", others said "I had to look at it twice before I got how to complete it". Although the survey was tested and modified, it was still clearly too complex for some, possibly a majority, of the fishers. It is therefore critical that future surveys are simplified with potentially a specific survey for each level of industry associations: local, sector, state and national.

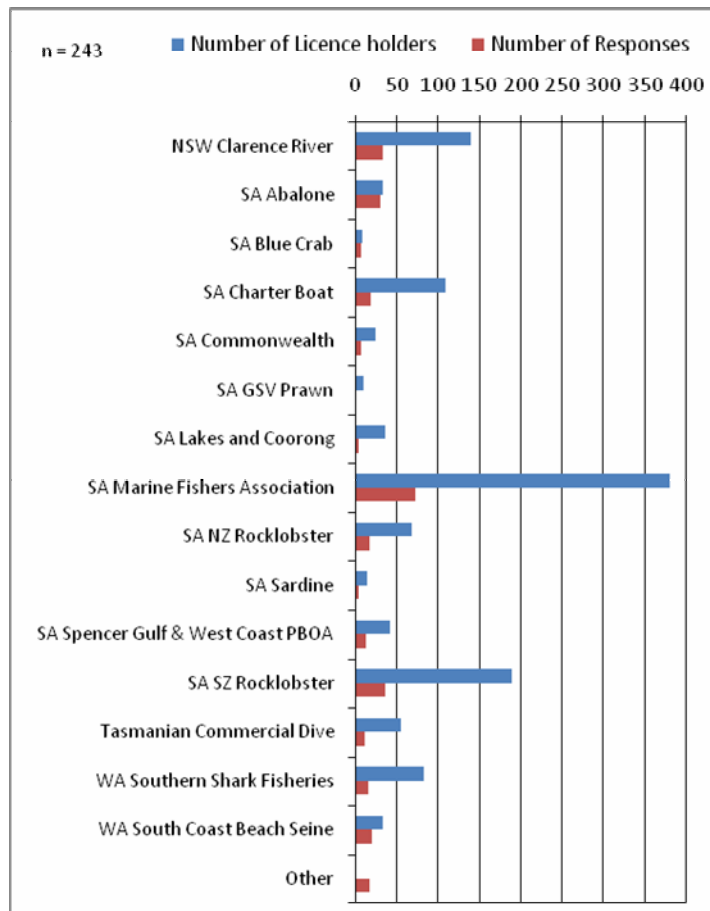


Figure 5: The number of responses recorded for each sector (red) with the number of licence in the sector (blue). NB "Other" shows the number of responses from non target sectors (n = 243).

A strong dichotomy is evident through the survey results. At one end of the spectrum there are those associations which operate effectively: with strong

¹ Some fisheries have been grouped together, for example the two WA Shark fisheries and the Commonwealth fisheries in SA. This is because the association represents both the sectors so it was a natural grouping.

membership and strong participation by the fishers. At the other end of the spectrum, the complete opposite is evident. There is a failure to join the association and to participate in activities designed to empower and/or assist the industry in a proactive manner.

Key Messages

- The response rate was lower than expected for all sectors except for the SA Abalone, SA Blue Crab, WA Beach Seine and Spencer Gulf Prawn fisheries.
- Engaging with the licensed fishers, although critically important, was extraordinarily difficult unless the fishers were directly involved and perceived some benefit.
- Surveys must be very simple to complete. Any perceived difficulty with the survey and fishers will not complete it.
- Response rates are likely to be influenced by other issues in the fishery.
- Approximately a fifth of respondents had two or more licences in multiple jurisdictions.

ASSOCIATION MEMBERSHIP

Are you a member of any fishing industry associations? -

Out of the 243 fishers who responded to the survey were happy to join one or more associations, with only 28 respondents not a member of at one level of association. But there were very few (21) that joined three or more and there were only two respondents that selected that they joined all four levels of fishing industry associations.

If yes, which ones? -

The survey was trying to understand which associations, or levels of associations, fishers held membership in, if at all. Although there are many layers of fishing industry associations, the steering committee believed that it was important to understand the relationship between the association levels. Figure 6 shows the overall membership results.

The levels of association membership were largely focussed at the port / co-op, Sector & State or Sector levels.

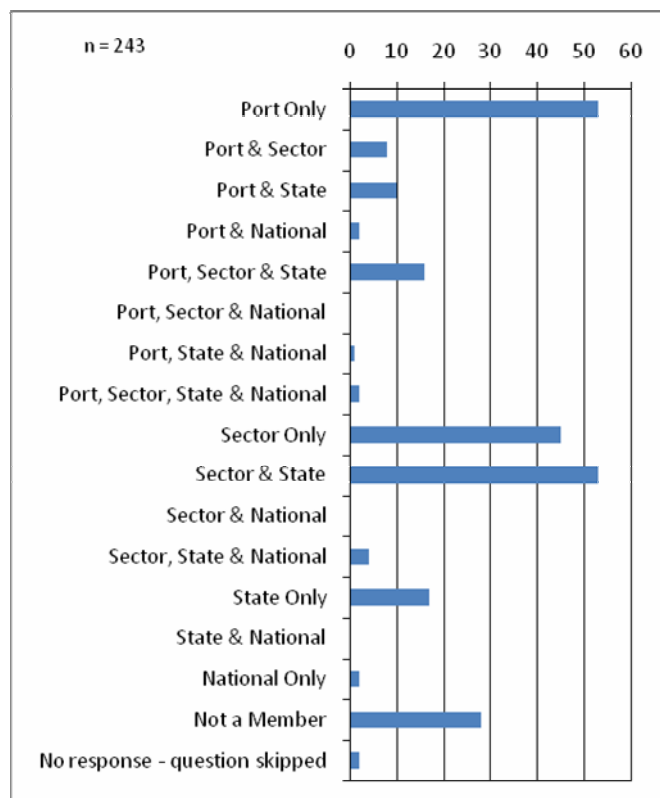


Figure 6: Where respondents held membership in fishing industry associations (n = 243).

The high level of port association / co-op membership could be based upon the involvement of a specific co-op in New South Wales as a target group for the survey.

Depending of the structure of the fishery the responses will be biased. For example the results of the NSW Clarence River Fishermen's Association were "local co-operative" (31), only 3 fishers chose differently.

The level of Sector & State membership represents the more common approach across most states where the state body is funded through a compulsory levy which is also used to support fishers at their fishery association level. This is not the case in South Australia where in some cases the state association membership is funded through membership of the sector level association. In most cases the state association in South Australia membership come from individual licence holders regardless of the sector or port association membership.

There is some confusion among fishers about just what associations they are, or are not, a member of. From those that responded there were 22 (almost 10%) fishers who did not recognise that they were members of their state association, either via compulsory fees set within licence fees or voluntary membership through their sector association. There were a further 4 fishers who recognised that they were a member of their state association but not their sector association even though it was through this body they funded their membership of the state body.

Many SA Abalone fishers fell into this category: they pay membership to the Abalone Industry Association SA which includes individual membership to Wildcatch Fisheries SA and membership to the National Abalone Association. But, abalone fishers were not the only fishers failing to recognise where they held membership. Membership of WAFIC and TSIC are compulsory for all licence holders and is paid through licence fees, but there were very few fishers in either State that acknowledged this membership in their survey response.

There was some confusion among survey respondents with the definitions of "sector" and "State" associations. Many fishers considered that their fishery specific association, for example the SA Blue Crab Pot Fishers Association, was the State association, when the project steering committee considered it to be the sector association.

The steering committee, industry structures and government's consider the State association to be the State representative bodies, i.e. WAFIC, TSIC or WFSA and that each of the associations addressing the issues at a specific fishery level were sector associations.

Respondents remain with one or two key associations they join. These associations are more commonly at a local, sector or state level rather than being a part of national associations.

Finally, there was not a strong response from the non members within the fishing industry. Of the over 800 licences in South Australia, almost 400 are not members

of any industry association. Only 28 respondents were not a member of any association.

Key Messages

- Licence holders that join industry bodies relate to their port or sector bodies strongly – these are the ones closest to their business.
- Many fishers are members of more than one industry organisation.
- Although fishers are members of more than one organisation, not all of them are aware of this multiple interest as it is often a hidden cost through membership fees to the second organisation being included in the fees for the other.
- Associations need to better inform fishers of their membership relationships with any other organisation.
- Where there is no compulsory funding there is not strong membership of organisations.
- The low level of support and recognition for any national organisations would indicate that there would be little recognition, therefore membership of any future national seafood industry body without funding being secured through a compulsory scheme or incorporated into state association membership there would be little chance of effectively funding any future national body.

WHY FISHERS DO OR DON'T JOIN ASSOCIATIONS

I am an association member because it –

Figure 7 displays *all* responses obtained for the question “*I am an association member because it...*”. The graph clearly shows that for the majority of the 193 respondents, that the key reasons for joining their association is to have representation on issues affecting the fishing business, to receive information about current and emerging issues facing the fishing industry and thirdly to protect the individual’s business assets. ‘Protecting my business interests’ was often altered with preceding phrases such as “*helps*” or “*tries to*”.

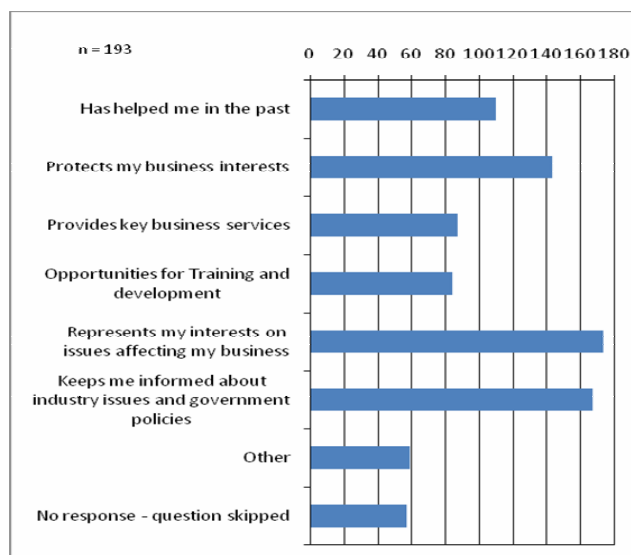


Figure 7: Reasons why respondents join their associations – all responses (n = 193).

Figure 7 has an 'Other' category. There were a number of alternative responses to the ones that were suggested in the survey. These results are very interesting and although diverse there are some common themes. For example unification was a strongly recurrent theme: "essential for a unified voice and better outcomes" and again "single voice for industry to government". The second strongest comments pertained to interactions with government agencies, these included: "helps deal with government who are not supportive for fishers"; "assists with government" and "to stand up to government". Others were more general in their comments for example "support processes that help maintain my

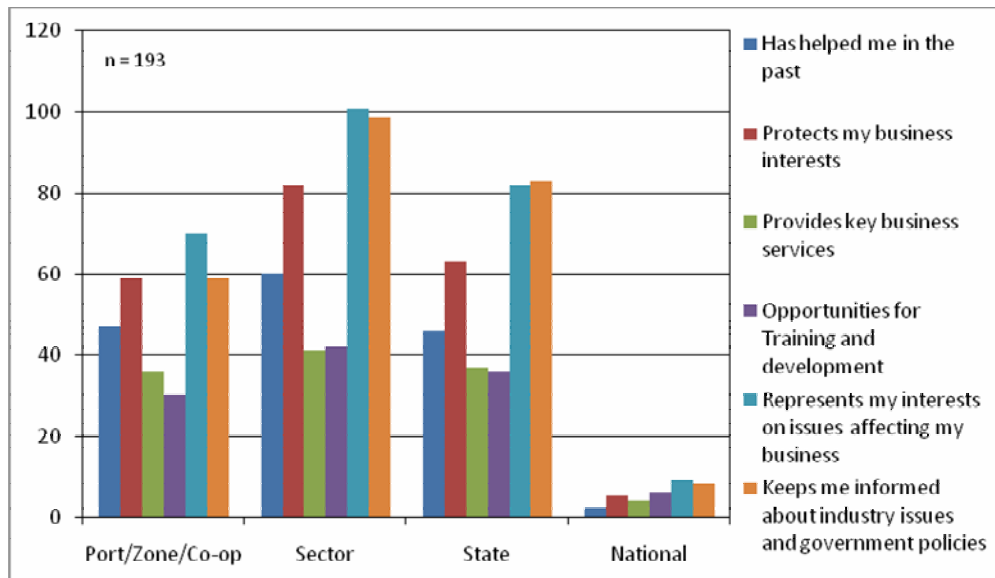


Figure 8: Reasons why respondents join specific associations (n = 193).

business" and "gotta have a say".

This result is also evident when looking at memberships for specific association levels (Figure 8). There are no particularly outstanding reasons for joining national associations: answers are spread reasonably evenly over a number of categories. There were only 11 respondents that said they were a member of a national association.

For specific fisheries and/or associations there are some key results. For example, of the large number (36) respondents in the Port/Zone/Co-op category 33 were provided with key business services due to their membership of the Clarence River Fishermen's Co-op. These fishers responded positively that the association provides key services, as it provides subsidised fuel, chandlery and ice to members. Results at a sector level are quite strong. Sector members joined primarily to be represented by their associations and to stay abreast of the current and emerging issues likely to affect their fishing business.

There are issues of multi-layers of industry bodies; however most fishers still see these layers add value or provide services of benefit. Fishers clearly see there is a need for both their sector and state associations providing representation on issues affecting their business, as well as recognising the role of keeping fishers informed on issues and government policy. The reason for being a member is

also shared proportionally in the areas of protecting their business interests, while acknowledging the associations had helped them in the past. Providing additional services to members was need considered to be as high a priority especially for sector or state bodies, but was still seen as an area that a number of members place value on.

I am not an association member because -

The key responses to this question highlighted *cost of associations* and *absence of perceived benefits* being key considerations with 24 and 17 responses respectively (Figure 9). Other considerations were principally coupled with the number of different associations that fishers felt they were expected to join and the lack of any value to individual fishers.

Comments relating to the two key drivers for non members included: *“Business costs are going up everywhere – I need to save somewhere!”* Another respondent went to great lengths to highlight the number of associations available to join for his charter boat business: *“...there are a plethora of businesses vying for your business/membership support – you could not afford to join them all”*.

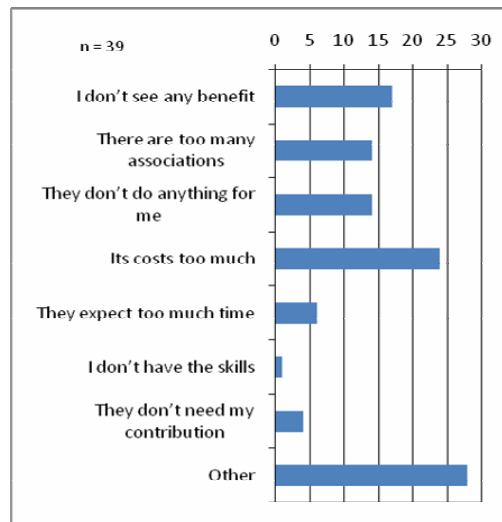


Figure 9: Reasons why respondents did not join associations (n = 39).

The key drivers regardless of the level of association – port / co-op through to national, shows that cost of membership was the major driver especially at the state and national level.

Most respondents provided an alternative response to the question. The open section to this question was provided in order to better understand what else may drive non engagement with associations. Some of the alternative responses were very specific; with respondents citing personal reasons, such as: *health reasons, deaths in families and trying to sell out of the industry* as key reasons for not joining. However, most of the reasons pertained to issues with an association itself. The key responses regarding associations include: *“I don't like the people running the organisation and the way they are spending industry money...”* they then went on to discuss the specific program being invested in. Another key comment was *“corruption within the association, activities are only benefiting a few”*. There is a key message for improved governance within industry bodies.

The reasons why respondents were not joining associations is made clearer when the data is broken down by each of the association levels: Port/Zone/Co-op, Sector, State and National levels (Figure 10). Membership cost remains the primary reason for not joining associations, particularly at the higher levels. Again the perceived benefits also contributed to fishers not paying membership as does the number of associations available to join. The results show that there is

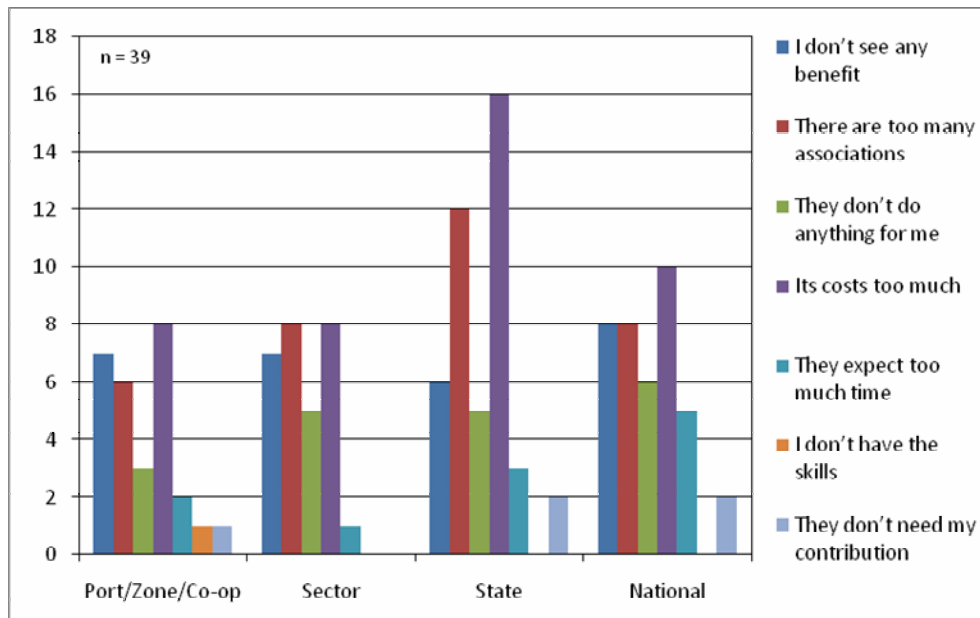


Figure 10: Breakdown of the reasons why respondents did not join associations at each

considerable confusion about the different associations and the roles that they play. With multiple layers of associations this leads to the belief that it cost too much to join them all which leads to fishers being selective about which associations they join.

There is a clear issue for associations at a state level to respond to the multiple layers of associations and the perception that there are too many. How the layers of associations link together must be an area for clarity for various bodies for fishers to value their role.

At a national, sector and port / co-op level there is a much closer level of concern at the value of the benefit of the associations and the relationship with the multiple layers of associations. The cost of belonging to a state association, especially in a voluntary funding framework, is considered to be disproportionate to the benefits provided or outcomes that individuals expect for themselves. While the personal benefits are there, they are less obvious to individuals when delivered at a collective sector, state or national level.

Key messages

- There was a lot of confusion in the interpretation of the question pertaining to the definition of "sector" and "state" associations which may have confounded the results. In retrospect the survey was possibly trying to

gather information at four different levels and it possibly would have been better to have multiple surveys rather than put all in the information onto a single survey. We all know the fishing industry is complex and specific but the survey did not allow for this complexity.

- The reasons fishers join associations are consistent across all levels of association.
- The principal reasons for joining associations are – i) representation of licence holder interests, ii) keep licence holders informed of issues influencing their business, iii) to protect their business interests, and iv) they had helped fishers in the past.
- The principal reasons for not joining associations – i) it costs too much, ii) fishers don't see any benefits, iii) too many associations and iv) they don't do anything for me.
- The principal reasons for not joining state or national bodies were the perceived cost and the “high” number of associations that fishers are expected to join.
- There are up to four levels of associations for fishers in some regional areas of fishing sectors.

INVOLVEMENT & PARTICIPATION

My level of involvement in these industry association(s) or bodies is -

Most of the 223 respondents to this question identified more than one role for association participation (Figure 11). Reading material provided by associations (136 responses) and participating in association meetings (134 responses) were the activities that most association members considered were the key means of participation for members.

Association members also saw they had an active role in responding to association communication as being the third highest rating activity for participation. These three most identified roles for members are seen as supporting roles rather than active roles in participation. Moreover, a third of the respondents that sat on boards or committees sat on more than one committee - 82 respondents, with 119 positions filled. This is not surprising as many fishers are members of more than one association and like most community groups, the onus for activity often falls to a small minority.

Having a small number of participating fishers also creates excessively high workloads and a significant shouldering of responsibility from these fishers and is counter to building successful, innovative industries (Plowman 2004). Respondents clearly made the point about limited involvement in administration of groups, with comments including - “I was voted

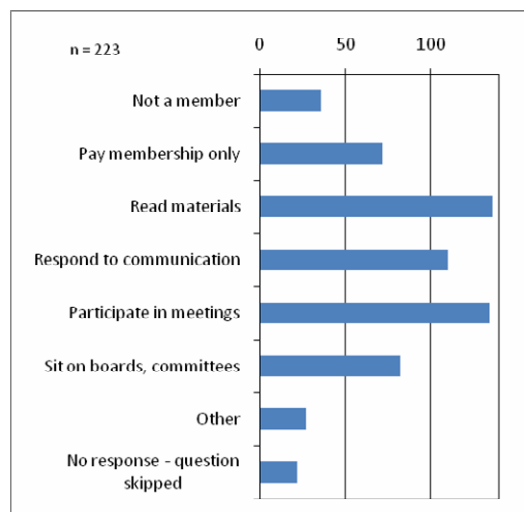


Figure 11: Type of participation by members in their associations (n = 223).

in, but I am reluctant to take on the role because of the work and time involved" and *"I participate in the association because not many fishers are willing to take on the roles."* Given the high number of respondents filling more than one role within their associations this is likely to reduce further the innovativeness, effectiveness and success of the association and therefore the industry generally.

At a port / co-op, sector, state or national level there was a strong variation to the nature of involvement in associations (Figure 12). At a port / co-op and sector level fishers considered their contribution was greatest through attendance at meetings (56 and 81 respectively) while reading materials is the next most significant with 44 and 78 respectively. Responding to communication was the third highest activity for both port / co-op and sector association members (36 and 66 respectively).

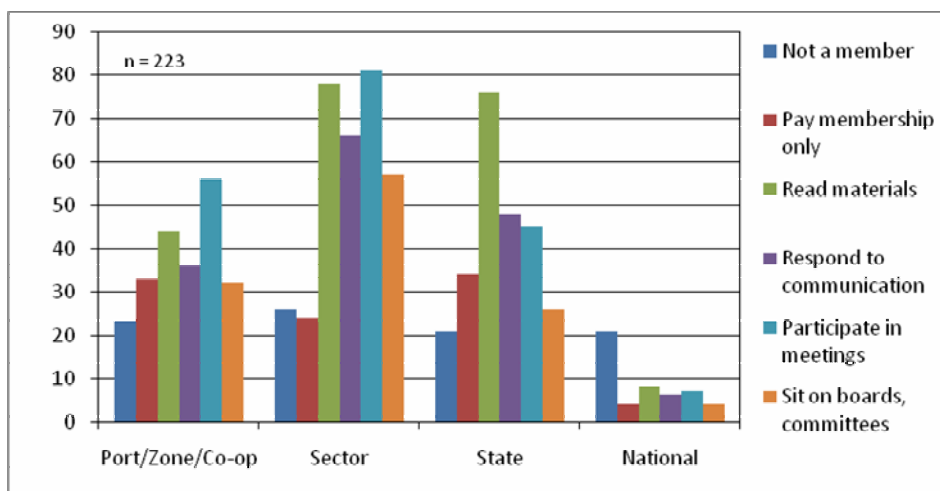


Figure 12: Member participation at each of the association levels (n = 223).

The level of participation changed at the State level with reading material being clearly the most significant participation activity followed by responding to communications followed closely by participating in meetings. Paying membership was highest at a state association level (34 respondents) followed by the port / co-op level (33 respondents). Conversely, sitting on boards and committees was the least supported activity from members at a state and national level. Sitting on boards and committees was something that fisher's considered more important at the port / co-op and sector level than at the state or national level.

Very few fishers saw any need to be actively involved in national associations, with no more than eight (8) identifying any active involvement at that level.

I participate in these Industry association(s) or bodies boards, committees or sub-committees because -

Fishers clearly want to have a say into the direction of their industry, also protect their assets and build or maintain a more profitable business (Figure 13).

Some fishers participate because they consider they have ideas that will assist the industry, this was clearly the last of the key drivers for participation.

Respondent clearly make the point of limited involvement in administration of groups, "I was voted in, but I am reluctant to take on the role because of the work and time involved". "I participate in the association because not many fishers are willing to take on the roles". With a significant number of the respondents filling more than one role within their associations this is likely to reduce further the innovativeness and effectiveness and success of the association and therefore the industry generally.

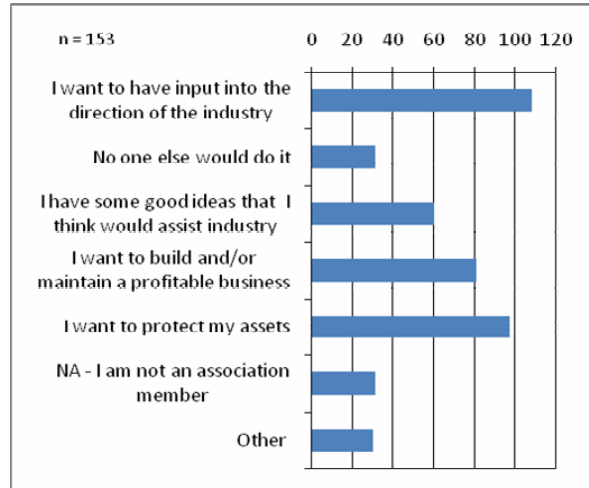


Figure 13 Reasons why respondents participate in the association boards, committees and/or sub-

Although the cumulative results reflect the reasons for respondent participation in the associations, it is also interesting to look at the participation at specific association levels. At each of the association levels, it is evident that the main reason that respondents participate in their associations is in order to have a say, and to protect their assets with the hope of building the profitability of the

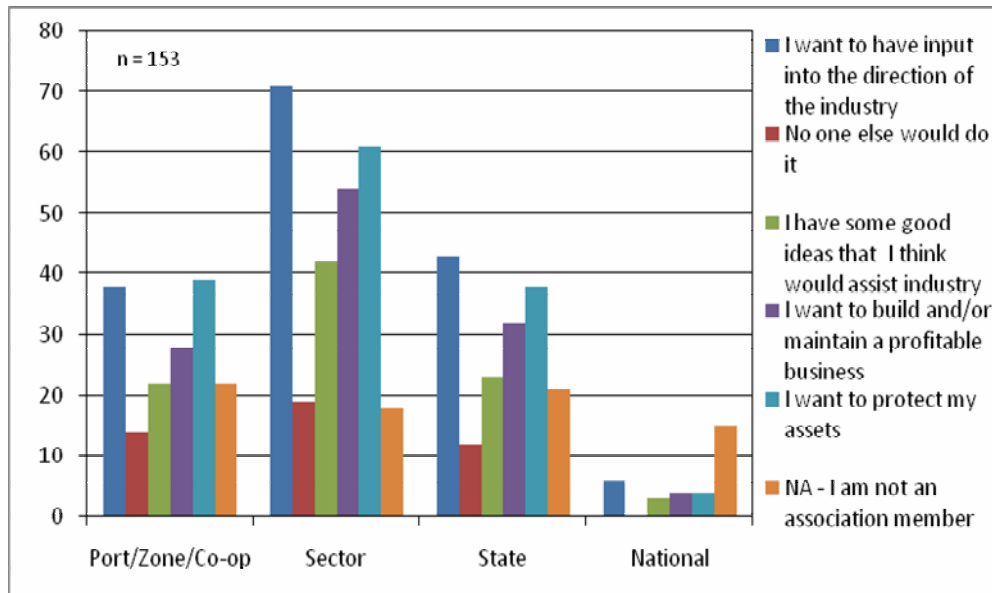


Figure 14: Reasons for participating in the associations at the specific association level (n = 153).

business into the future, while wanting to contribute their ideas for the future of their industry (Figure 14). The consistent results for all levels of association make it clear the industry has a strong commitment to their business and in many cases their lifestyle choice. These respondents have a positive outlook for the future of the fishing industry which is not always commonly held at the grassroots industry level. For example "I love fishing and I want to look after the industry for the long

term" and again "I am in the industry and I am happy to give back to the industry".

I don't participate in these industry association(s) or bodies boards, committees or sub-committees because -

Fishers do not participate in their associations in a more direct way because they believed that it was going to take up too much time that they did not have and also bear a significant cost to be missing fishing opportunities (Figure 15).

While the preceding comments were the highest for not participating in the association boards and committees, it must be noted that the other responses, particularly those relating to personal relationships with the association were a driver in the lack of participation – "some fishers take over and I can't have a say", and "I don't like the people making decisions". Improved meeting management would have benefits in making participating in meetings more attractive to fishers.

A major area that is obvious from the results is that there is a need to build on the capacity of fishers to be able to more effectively engaged, given the proportion

of responses to – "I don't feel confident", "I don't have the skills", "I don't have the experience". Improving an individual's confidence and capacity to effectively participate will add to the engagement of fishers and strengthen associations.

There were also a significant number of respondents (57) that provided alternative comments to this question. The key comments in this area relate to – having previously contributed to associations (14); government failure to recognise industry contribution (6); industry politics and governance (6); and busy with business or family (5). A number of the responses relating to government intervention and feelings of frustration or not getting a 'fair go' with government processes: "There is no point because of government and political decisions" and again "...because government continually raises the same issues without getting resolution". This is an area to be critically addressed for the future of co-management.

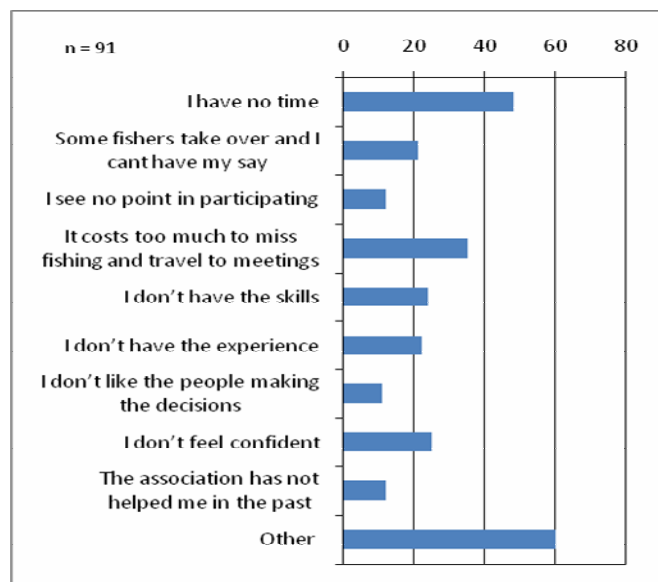


Figure 15: Reasons why respondents don't participate in the association boards, committees and/or sub-committees (n = 91).

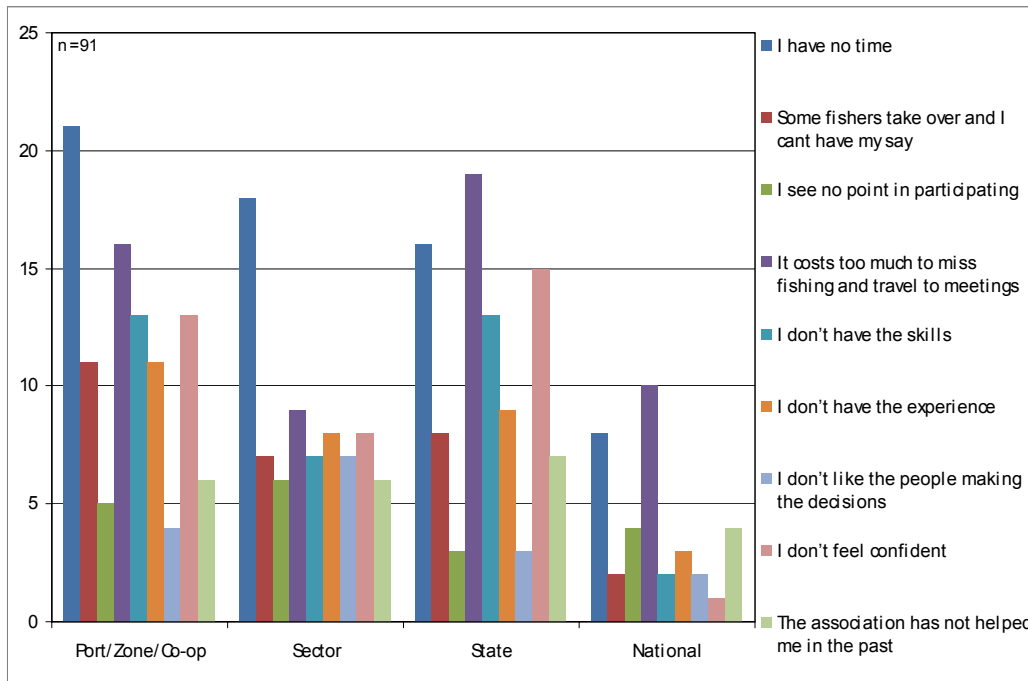


Figure 16: Reasons for not participating at the specific association level (n = 91).

Others were just frustrated with fishers and their lack of commitment, or participation. Another interesting comment that was raised by a number of respondents was the perceived discrimination by other fishers and/or by government: *“I’ve been victimised in the past and I’m sick of being shot as the messenger by government agencies and then again by the industry for not getting the desired results”*. It must be acknowledged that fishers believe that there has been a significant erosion of commercial fishing industries throughout Australia by all levels of government. In some instances management intervention was required, but at other times the commercial fishing industry has been eroded by decisions based solely on seeking to buy votes for parliamentary political outcomes. This consistent ‘battling’ for commercial access has led a number of licensed fishers to re-evaluate their commitment to industry associations designed to maintain their businesses.

The reasons for not participating at the specific association level are again reflective of the -cumulative results (Figure 16). At the local / regional or fishery level of association the key reason for not participating was the issue of time: *“I am too busy maintaining the business”*. At a state or national level the key consideration became the cost of meetings – both direct costs (travel costs) and indirect costs (loss of income / fishing time): *“It costs too much to continually travel to meetings in Adelaide”*. Time was also a major issue at the state and national level. Cost was surprisingly a major consideration for non participation at a port / zone / co-op level even though these meetings would be held locally and could be more easily held around availability.

Not having the confidence to be involved at a local and state level were outstanding responses for those levels of association. The lack of skills also rated

the fourth highest consideration at a local and state level. There is a need to build the capacity for individual fishers to be able to be more effectively engaged in the associations.

Others had previously held roles and felt they had done enough: *“I’ve been involved for many years and I feel that I’ve made enough of a contribution”*. Confidence was also a reason some respondents gave for not participating in the association. For example *“I don’t feel confident and I don’t feel that I have the experience, plus there needs to be succession planning – it’s time for the younger ones”* and *“I’m a fisherman – it’s too complicated and I want to go fishing”*.

Key Messages

- 55% respondents (136 out of 245) mostly participated in their association through more passive activities such as reading materials and attending scheduled meetings.
- A third of people that sit on boards and/or committees sit on more than one board/committee.
- It appears there are only a small number of fishers (82) that contribute to the effective running of their organisations (covering 21 port/sector/state/national groups that support the industries surveyed).
- The small number of actively participating fishers may contribute to ineffective succession planning, change and new ideas within the fishing industry and therefore be unintentionally discouraging innovation and proactive development of the industry through the involvement of new faces and ideas.
- The time and costs associated with participating in associations needs to be addressed in order to encourage fishers to become more involved in the administration of their associations.
- There is a need for better targeted training and development of fishers to build on their capacity, confidence and skills in participating more effectively in meetings which should lead to more effective associations.

ROLE OF ASSOCIATIONS

I want to have input into the direction of these industry association(s) or bodies -

Most respondents wanted to have input into the industry association (Figure 17). Since most survey respondents were members, it is likely that the fishers would want to have input into the association. This result also follows the key reasons for joining associations. There were

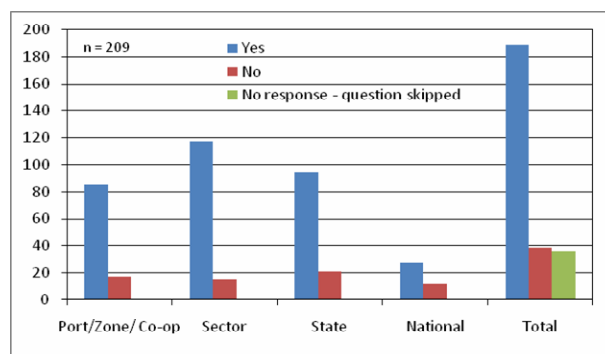


Figure 17: Responses to “I want to have input into the direction of these industry association(s) or bodies?” (n = 209).

38 respondents that did not want to have input into any association. Interestingly, this number was not entirely the non-members. Some members said that they did not want input. But this too follows with the results from the question - why join associations?

More fishers want information and input into their industry / fishery rather than having input into the direction setting and decision making (refer to Figure 17 and 18) for their association or industry body.

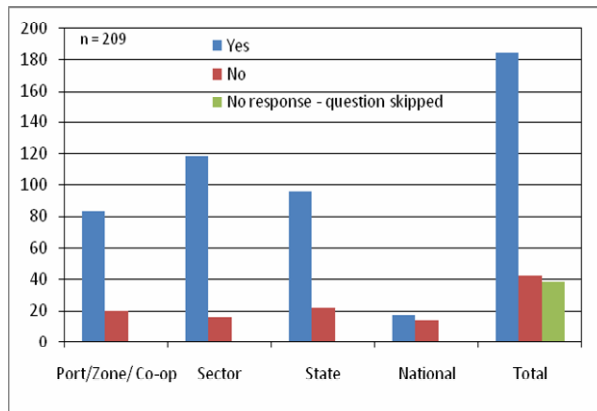


Figure 18: Responses to “I believe I have the opportunity to have input into the direction of these industry association(s) or bodies?” (n = 209).

I believe I have the opportunity to have input into the direction of these industry association(s) or bodies -

There was a very strong belief (greater than 80% of respondents) that members, at the port/zone/ co-op, sector and state level, have opportunities to have input into direction setting. However, there were 42 respondents that felt they did not have the opportunity to have input into the direction of the industry association (Figure 18). This strong belief did not flow through to national bodies that fishers were members too.

It would also seem that addressing the involvement and engagement methods of associations would be a task which may add to improve membership rates. Over two thirds of those fishers that are members of associations are largely satisfied with their input and ability to contribute to the representative bodies.

There are however, almost 20% of fishers who are not satisfied with their ability to have input into, and influence over the affairs of an association. This may require associations to seek feedback from fishers about the activities and operations of that association to improve its performance for its members. Addressing a number of the issues identified in the reasons for not participating could well resolve a number of the concerns fishers hold.

I think the role of the industry association(s) or bodies should be to -

In responding to the above question all respondents generally selected most available categories. This demonstrates a shared view of the broad range of areas that fishers expect their associations to be involved in. (Figure 19).

The graph (displayed from highest response rate to lowest response rate with the number of respondents indicated for each category on the graph) shows that most respondents thought the role of associations should be to *provide political*

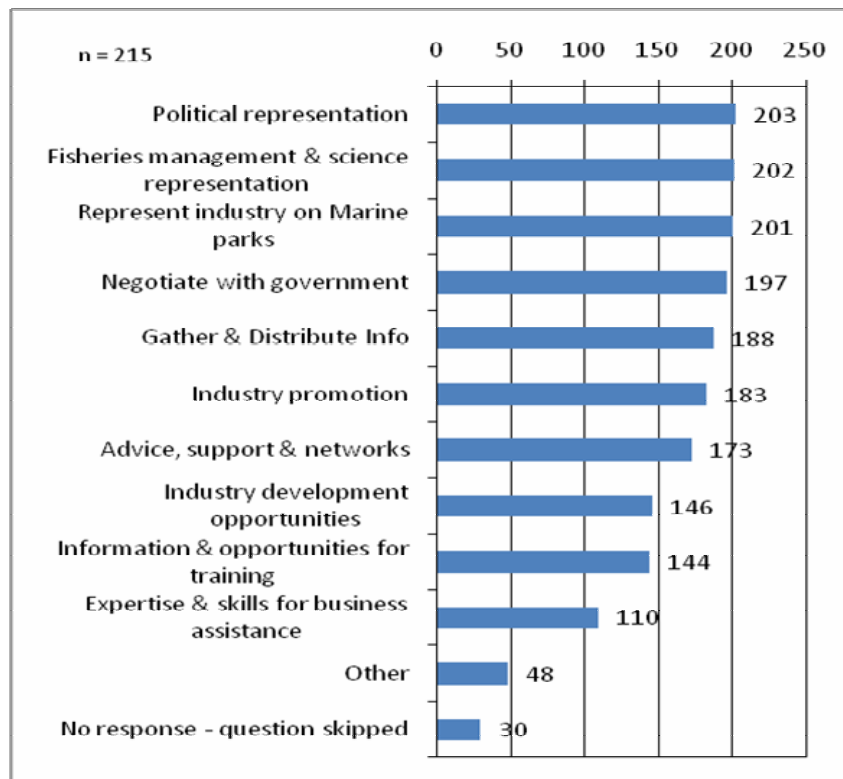


Figure 19: Roles of associations (n = 215).

representation/ lobbying. The next three highest were: 1. *representation on fisheries management and science*, 2. *representation on marine parks and conservation issues*, and 3. *negotiate with government on their behalf*. There was also a strong indication that the associations should also be the main conduit for communication and information (188). Providing information, promoting the industry, provision of advice and support, industry development and training were all seen as areas of association responsibility.

However, about half of the respondents did not feel that it was the role of the association to be providing expertise and skills to assist individual businesses (110).

There were also 48 respondents that had alternative suggestions as to the role of the association (Figure 19). Some of these suggestions were statements, others were pertaining to the method of operation rather than suggestions of activities themselves.

The key areas for free comments related to representation at a political and government level, marketing and promotion, identification of issues, resource management and science and unifying industry or working together with other industry bodies. Some of the overarching statements included: *"be proactive not reactive"*; *"protect the rights of fishers"* and *"secure the future of fishing"*.

Of the 48 comments the most significant were the 11 respondents that made direct references about government: *“take a firm role with government”* and *“go between government and industry”*. Other respondents referred more directly to the activities of the association, for example *“provide information but not information overload”*; *“prioritise issues, make things transparent”*; *“look after members”* and *“provide strong leadership on key issues”*. Some fishers also recognised the importance of relationships between various groups within the industry and made reference to it: *“work together with sector associations etc as required”*; *“build stronger relationships with processors to develop marketing”*; *“unity”* and *“sharing experiences through activities such as mentoring”*.

There were very few fishers that allocated roles to different association levels. Rather respondents overlapped roles between the various associations. This result shows that most respondents expect all associations to fill all roles. Figures 20 - 23 breaks the information down into specific association level for each of the categories. Graphs are displayed from the association level perspective. Each of the graphs has the same scale for ease of interpretation. This also highlights the much lower level of recognition and understanding of the need and role for a national body.

Port/Zone/Co-op Level Associations

At the local port/zone/co-operative level of associations, 90 respondents suggested these associations should primarily be responsible for the gathering and distribution of information (Figure 20). Other key roles for the local level association were to provide advice, support and networks (72) and

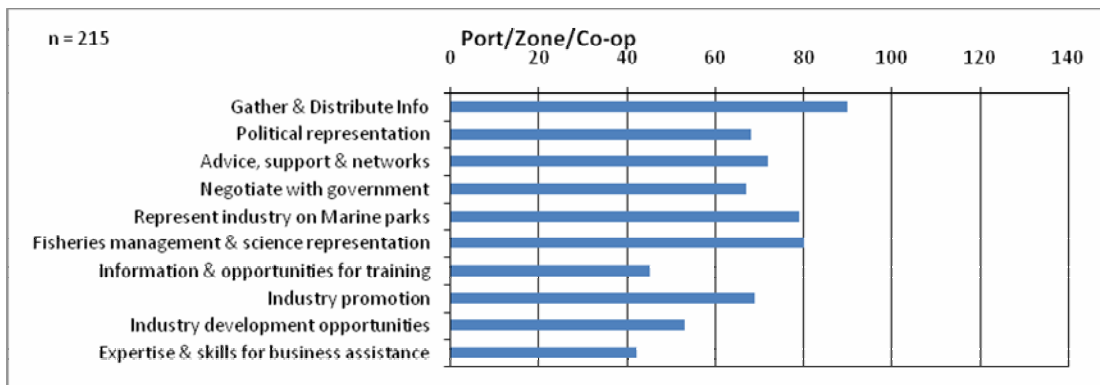


Figure 20): Role of the Port/ Zone/ Co-op level associations (n = 215).

representation on marine parks (79). It is important to note that 33 respondent were from the NSW Clarence River where the association has a greater role than might be found in other local level associations, due to the different structure of State and sector fisheries associations in that State.

Sector Level Associations

Like the local level associations, respondents suggested that the gathering and distributing information was a key activity of sector associations. However,

respondents suggested that the top role for sector level associations was to provide representation on fisheries management and science (111) (Figure 21).

Respondents also believe that key activities of sector level associations are to provide representation on marine parks (102) and to negotiate with government on their behalf (99). Respondents did not believe that it was the role of the sector association to provide expertise and skills to assist their businesses, to provide information for training and development or to provide industry development opportunities.

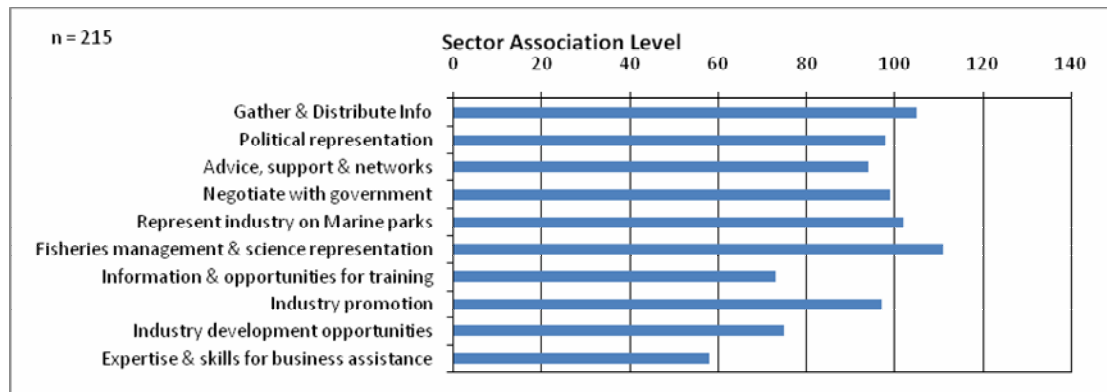


Figure 21): Role of the Sector level associations (n = 215).

The results show that respondents had quite uniform thoughts for the role of the sectors. They saw sector associations as providing skills or filling roles that could not be filled in any other means. For example, when discussing the “expertise and skills to assist businesses” most respondents during interviews replied that they would pay for an accountant or lawyer rather than go to the association. Similarly with training: firstly the fishing industry is not widely recognised as having a training culture, and secondly, if training is required fishers know where they can go to get the required training – this is likely to reflect on regulated qualifications rather than building on skills and competencies in non business areas. It is possibly more important for associations to have strong links with training providers and other businesses that deliver specific skills. Interestingly, respondents all considered that industry promotion was a key activity for sector level associations. Industry promotion (97) was only marginally behind negotiation with government (99) but it is a role that very few industry associations have acted on and until recently even recognised as an activity that needed actioning.

State Level Associations

Once again the key roles for the state associations were not dissimilar to the local and sector level associations. Respondents suggested that state associations should be primarily involved in representation on marine parks and other conservation issues (120) (Figure 22), closely following was political representation (118). This highlights the significance of the marine parks programs on the industry and demonstrates the level of concern by fishers over the issue. Moreover, it is also likely to suggest an overlap in roles that could be better managed with strong association leadership and effective partnerships between associations to clarify the role at each level to avoid overlaps.

Respondents also suggest that it is critical for state associations to be in negotiation with government (114) and provide representation on fisheries management and science (113). Fisheries management and science was also considered to be a key role for the sector level associations. Again to ensure there is not undue overlap in resourcing, it becomes critical that associations work together on issues where possible and in doing so delegate one association to be the lead association for that issue. This involves building trust between the associations, having clear terms of reference from the outset and effectively communicating the information between the different groups. Industry

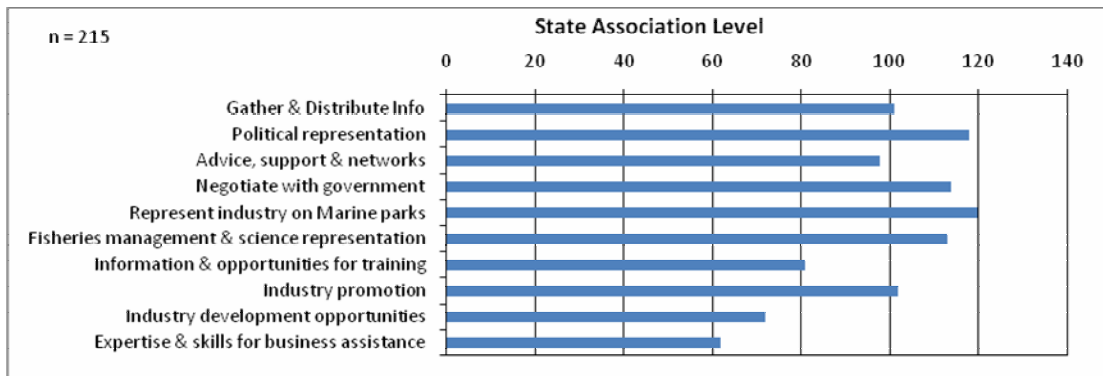


Figure 22): Role of the State level associations (n = 215).

promotion and the gathering and distribution of information were again seen by respondents as key roles of the state associations. As was said when discussing the sector associations, industry promotion has been an area that has not been well addressed in the past by associations at any level, but it is interesting that the fishers consider it a critical role.

National Level Associations

National level associations were not seen as being particularly relevant for most categories and by respondents. The national association level scored poorly in all categories (Figures 23). This is a result which might be important to address when developing a new national industry body. It indicates that grassroots fishers do not perceive any outcomes or relevance for their business from national associations. Fishers may not have realised that fuel rebates and outcomes pertaining to taxation, for example, can all be accredited to a national body as these are national issues. The confusion of the fishers is critical to address through continually providing information and feedback to members. Moreover,

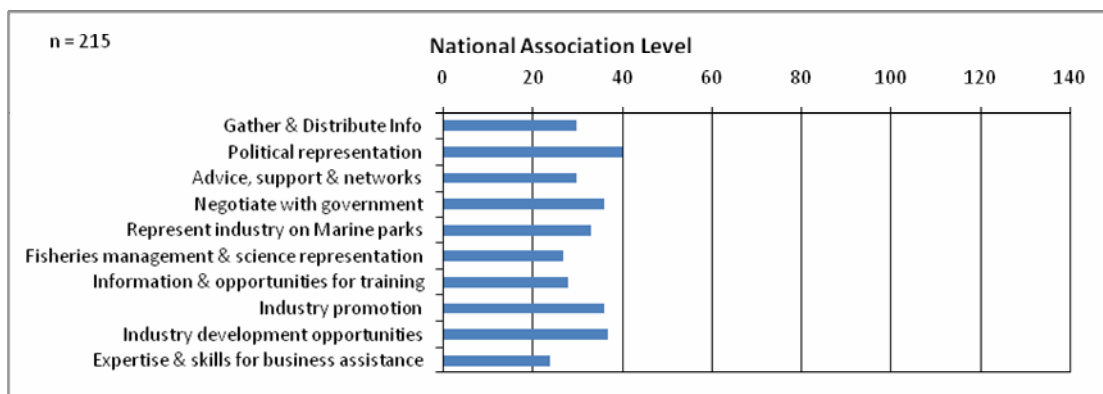


Figure 23): Role of the National level associations (n = 215).

associations must also have mechanisms that allow fishers to provide feedback directly to any national association.

The sector and state associations were given the largest allocation of roles they are also the most supported level of industry associations. Fishers recognise there is some shift in key areas of responsibility from the local port association to the national level.

Port / Zone / Co-op's are seen to have the key roles of:

1. Gather and distribute information;
2. Representation on fishery and natural resource management (marine parks) issues;
3. Science and advice; and
4. Advice, support and networks.

At the sector level which is a more diverse group but with a common focus on the fishery, the emphasis shifts to:

1. Fishery and natural resource management;
2. Gather and distribute information; and
3. Political representation and negotiation with government.

At the state level, associations must capture interests from a wide range of sectors, so the emphasis shifts to a stronger role in:

1. Natural resource management;
2. Political representation, negotiation with government; and
3. Fisheries management.

At the national level the association's roles are considered to be:

1. Political representation;
2. Industry development;
3. Industry promotion; and
4. Negotiation with government.

These subtle differences between levels of association recognise the level of engagement required to bring about changes to benefit industry – port, zone, co-op and sector groups focus on fishery management and engaging fishers in this process, while state bodies focus on representation on whole of industry issues which are often developed at a state or even national level.

The variable nature of association structures also adds additional layers of roles and greater confusion on the back-deck of the boat. For example the SA rocklobster fishery has four levels of associations: 1. a local port association (e.g. Black Fellows Caves), 2. a zone association (e.g. South East Professional Fishermen's Association or (SEPFA), 3. the sector association (SA Rocklobster Advisory Council or SARLAC), and 4. the national association (Southern Rocklobster Limited or SRL²). This does not take account of the State Peak Body, which SEPFA is a member of, or any national body. Rocklobster fishers are one of

² SRL is not strictly an association as it was developed as a tri-state marketing body for the Southern Rocklobster in South Australia, Victoria and Tasmania, however many rocklobster fishers talked of it as a national association.

the key groups to suggest that there are too many associations and that they were confused as to which one to join.

With numerous associations it is understandable that fishers are confused about the roles of the various associations and therefore find it difficult to delineate the roles between them. Alternative funding structures that demonstrate the linkage between each of the association may go some way to alleviating the confusion³. But, at a minimum, fishers must be re-educated about the roles and activities of each of the associations. Moreover, associations at all levels need to work together to ensure they are effectively delivering outcomes to fishers. The need to work together is particularly necessary for government funding and lobbying activities.

Key Messages

- There is significant confusion at the grass roots fisher level about the role and activities of the various industry associations. Industry associations may need to re-consider the structure of associations, particularly in terms of membership structure and payments. Associations need to better educate fishers as to the relationship between the levels of associations and their role and how each of the associations work together to ensure better outcomes on the ground for their businesses.
- Associations needs to agree on their roles where there is overlap to provide clarity to industry as to which is the lead group for an issue.
- Associations need to consider alternative methods to better communicate outcomes and benefits to fishers to ensure they understand the need for effective associations at the various levels. Sharing communication tools and costs to deliver messages relevant to the various groups could better clarify for fishers the roles and emphasis of each group.
- Associations may need to reconsider the types of activities undertaken at the various levels. By working more co-operatively and collaboratively associations at different levels could reduce their workload and allow a better focus on facilitating outcomes which may in turn encourage greater membership.
- Industry promotion is an area identified for associations, especially at a state and national level, yet there is little or no capacity or no program to support delivery of this role for the industry, except for a very small number of specific sectors or programs.
- Any future national body will have to establish strong communications programs with individual fishers in order to demonstrate their role and be able to be seen as accessible.
- The ability to improve association and individual enterprise performance through training and development programs is not well recognised within industry. A greater recognition that they are small businesses, not just producers of fish, could see improved returns to individual enterprises and greater support for associations.

³ This was the historical arrangement of the Australian fishing industry associations in the late 1960's. The Australian Fishing Industry Council had sub-branches (e.g. the SA Branch of the AFIC). The model is still successfully used in the Returned Services League (RSL) for example.

ROLE OF FISHERS

I think the role for fishers in the association is to -

Overall, most fishers were unable to provide a strong indication of the role for the fishers with 76 respondents skipping the question entirely. Of those fishers that did provide a response, there were 118 respondents who suggested that *providing information, sitting on boards and committees, representing members and getting feedback from members* were roles that fishers should be taking on (Figure 24).

The other categories all had lower response rates. Of interest is the role of *'Directing the work of the staff'* which was included in the survey because the experience of the authors was that fishers would prefer to be *'led'* by their paid support providers. Even at a Board level, fishers will not direct the work of the association by identifying key issues. Rather it was the staff directing the organisation in identifying current and emerging issues facing the industry. Most fishers believed that paid employees should understand what needed to be done and therefore should be able to execute the work without any assistance.

Another commonly held opinion was that staff *'are paid'* and *'it's their job'*. This result shows a dependence of the fishers on the staff within the association. In most other organisation's boards this would be unheard of. Boards and their directors have a legal responsibility for the organisation, not the staff. Moreover, the fishers have the vested interest in the outcomes delivered by the organisation so it is interesting that fishers don't take the lead role for the direction of the organisation and the staff. Plowman (2004) reported that successful, innovative industries developed and utilised the skills and expertise of the voluntary members.

Like the *'role of the associations'*, respondents also made a number of alternate suggestions for the role for the fisher. Many of the diverse suggestions were comments rather than roles from *"catch the fish – leave the politics out of it"* to the more frustrated *"get off their arses"* or *"pay membership"*. Other suggestions focused on communication: *"express views"*, *"listen to each other"*, *"talk amongst themselves (at a local level)"*. Other respondents were more thoughtful, *"follow best practices"*, *"support the association"*,

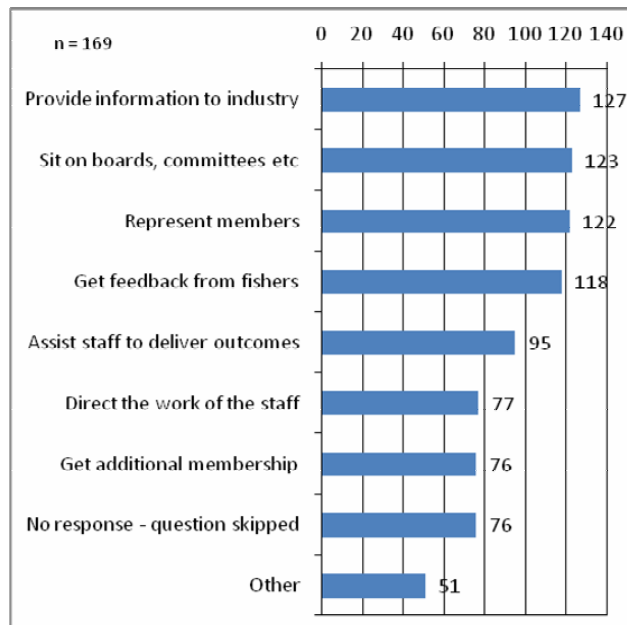


Figure 24: Roles of fishers within the associations (n = 169).

“be united and actively engaged” and “paid staff should be a support to the fishers rather than the other way around”.

Most associations do not undertake strategic planning nor are there defined goals and objectives for the organisation. Developing agreed goals and objectives for the industry and/or association, with a greater emphasis on strategic planning would help define the role of the organisation and the staff and give greater power to members to influence the organisation and its direction.

Responses on the 'role of the fishers' in associations are further partitioned into the specific association levels (Figures 25 - 28). As with the roles of the associations, the results for the roles of the fisher within those associations are similar across the different association levels.

Port/Zone/Co-op Level Associations

At the port/ zone/ co-operative association level most respondents considered that the role of the fishers was to be an information conduit (53), represent the members (53) and sit on boards and committees (52) (Figure 25). These are all activities that fishers have been actively involved in historically and the responses indicate that fishers are more willing to be involved in these more traditional activities. Where the roles are either more controversial or less traditional, there is a lower response rate, for example assisting staff to deliver outcomes.

When this category was posed some of the activities included informing fishers about meetings, getting them to respond to surveys and be actively involved in other programs being delivered by the association. But still respondents in the port/ zone/ co-operative did not consider this to be a role for the fisher. In contrast many research programs and activities being delivered for the fishing industry require fisher participation, input and are ultimately being driven by fishers for the long term. For example environmental management systems (EMS's) involve the active participation of fishers into a thorough environmental risk assessment for their fishery, followed by the implementation of mitigation measures all within a continual improvement framework involving a regular review process by the fishers themselves. Many fisheries have developed EMS's with external assistance. However, given that fishers don't see their role as assisting to deliver outcomes, it would be interesting to assess the effectiveness of the systems at delivering continually improved environmental benefits.

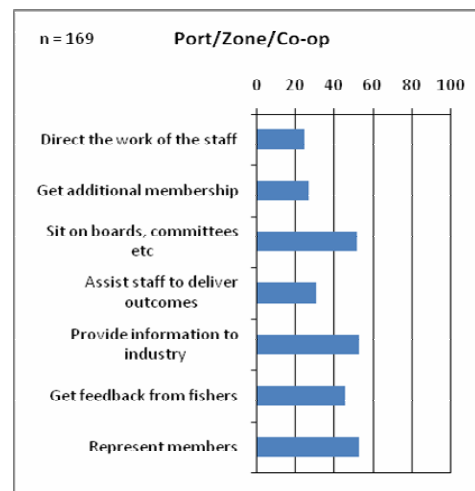


Figure 25): Role of port / co-op level association (n = 127).

Sector Level Associations

At the sector level it is again the 'traditional' activities that respondents consider to be the fishers' role within the association. Again respondents suggested that *sitting on boards and committees* (81) and the *provision of information to other fishers* (80) were the roles for fishers (Figure 26).

At the sector level *representing members* scored similarly as *getting feedback from members* (77 and 76 respectively). Many respondents did not see the more controversial or less traditional categories as roles for fishers even though the success of an association is directly related to the level of active involvement of members in the administration and management of their associations.

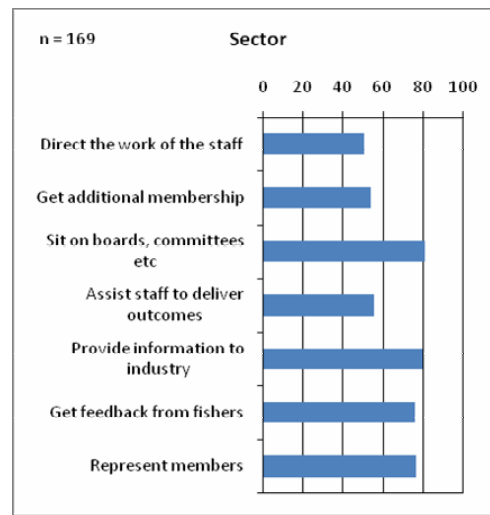


Figure 26): Role of the sector level associations (n = 169).

State Level Associations

The state level associations repeated the results for the previous two association levels. Respondents considered that the key roles for fishers were *providing information* (83), *represent members* (80), *sitting on boards and committees* and *getting feedback from members* with a response rate of 73 each (Figure 27). There was a greater recognition at the state association level of the need for fishers to *assist staff to deliver outcomes to the industry* with 61 respondents suggesting this was a role for fishers. But again *directing the work of the staff* and *getting additional membership* had a very low response rate (45). *Getting additional membership from fishers* was very negatively received by the fishers. Respondents were very reluctant to encourage others to join even though fishers continually complain about those fishers that are "sponging off others".

Some respondents explained that they considered that the association benefits needed to speak for themselves, that fishers should want to join because of the outcomes and activities that are being delivered by the association. However, fisher confusion about the roles, responsibilities and activities of the associations has already been highlighted as a key reason fishers fail to join associations. Again associations may need to increase and/or alter the methods of communication to fisher to ensure that fishers are aware of the levels of activities and outcomes being delivered by different associations.

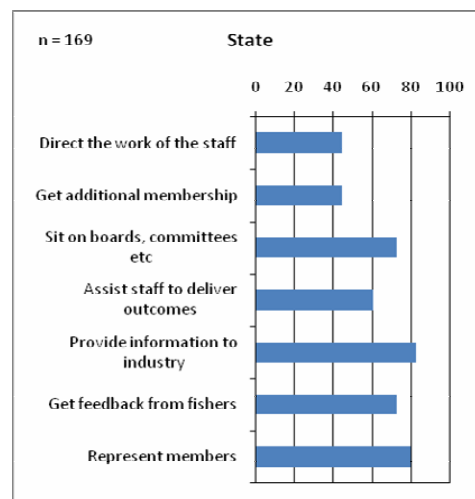


Figure 27): Role of the state level association (n = 169).

Moreover, perhaps associations need to better reflect on what may have been secured or at least not lost without the association, rather than try to demonstrate what additional benefits could have been achieved. Maintaining a status quo position may in itself be a significant result from a range of activities directed to securing access rights and levels of participation given management is largely directed at reducing fishing impacts or production.

National Level Associations

The roles at a national level association also followed the pattern of the other three association levels and in fact were very similar to the results for the port/ zone/ co-operative level associations (Figure 28). At this level of association it was considered to need the highest level of member representation from fishers. As with other questions, at the national level, the need for effective communications from and to the association with its members was a key area.

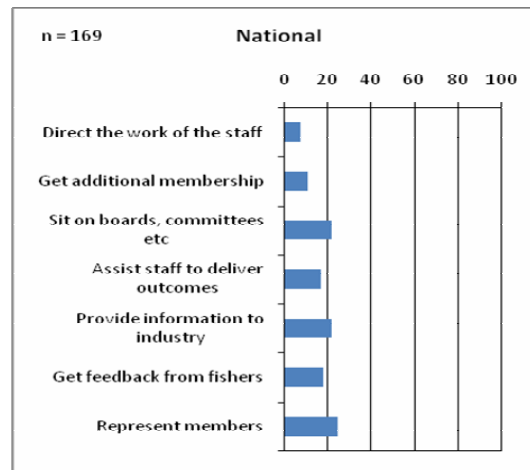


Figure 28): Role of the national level associations (n = 169).

Key Messages

- Most respondents found it difficult to see a role for fishers within their association. They failed to recognise that they are the core of the association (it exists because of them and for them). Strategic planning is an effective means of engaging all members in setting the direction for their port/co-op, sector, state or national association.
- Traditional roles were more likely to be identified by respondents, e.g. *represent members, sit on boards and/or committees or provide information.*
- *Managing and directing the organisation* was not considered a role for fishers. Most respondents believe that the paid staff (if there were any) should be directing the work of the organisation.
- Boards and their directors need to be more active in identifying the issues confronting their industry and ensuring their organisations are able to respond effectively to them with sufficient resources
- Given a previous question showed recognition of the role of industry promotion, fishers failed to recognise that they have a critical role in representing their industry to the community and demonstrating the importance to the community in the production of a key food source.
- Fishing industry associations are not large, or well resourced, organisations and so they must be able to rely upon their members to more actively support their work and promote their activities to those in their sector, the industry or the community.

ASSOCIATION PERFORMANCE

Are you happy with the services, activities, etc provided by these industry association(s) or bodies?

Fishers are often asked to implement continual improvement practices in their businesses, but how often have associations asked if their members are satisfied with the services delivered by the associations and what the associations could do better? The survey asked both of these questions to ascertain (i) the areas that were not meeting the expectations of the fishers and (ii) which areas were

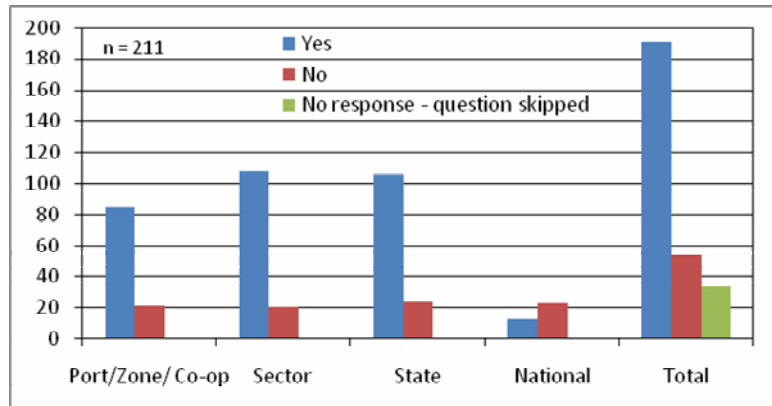


Figure 29: Level of satisfaction with the services and activities of the associations (n = 211).

perceived to be performing well.

Given that most respondents were members of associations, it is not surprising that most respondents were happy with the services and activities of the associations (Figure 29). This is an excellent result.

While the vast majority of fishers who are members were satisfied with the performance of their associations, there is still between 15 – 20% who are not, together with those who have chosen not to join under the various voluntarily funded groups in the industry.

The challenge for those groups is to address improvements that will change the perceptions of the performance of each association. These improvements may be in areas of communication, governance, succession planning and structures, new or improved services or in improved management performance of fisheries.

The relationship with government has become more difficult and complex for industry groups. Over the past 15-20 years or so fisheries management has changed dramatically, as has the Australian community. Some of these changes were required to ensure sustainable harvest of fisheries resources and reduced impact on the environment that supports these resources. However, there has also been growing politicisation of fisheries management as the community has gained greater disposable income, much of which has helped develop greater opportunity for recreational fishing and created the sea change phenomenon within an increasingly urban society.

Moreover, the expectation of the unlimited "right" to access public resources by the general public fails to recognise the need for effective resource management for and on behalf of the community. As was previously stated, the industry did need to change the way it was operating, like the government resource managers needed to recognise the need for limited entry following the release of excessive licences throughout the country. However, for many commercial fishers, they believe that the pendulum has shifted too far in the alternate direction. Through discussion with fishers while undertaking the survey there was a strong belief that most fishers are failing to join associations because they see 'no point'. Many commercial fishers do not feel that they are getting a "fair go" and that they are continually facing a barrage of issues from government and are forced to make changes while many other stakeholders are no longer blameless in the inappropriate exploitation of the resource. There is a view this erosion of their statutory rights has been in part due to the poor performance of industry associations.

There needs to be effectively funded and resourced industry associations that can represent the collective views of its members and participants to government. This funding must be secured against the opinion of governments that would seek to limit or remove the resources of an association when the relationship becomes tense or difficult over issues, as it occurred in South Australia and Queensland. The industry body must be able to have an effective capacity to assess and respond to its member's needs or industry and/or government initiatives and many other programs designed to assist them. This is a real issue that is being felt on the ground and must be addressed if the commercial fishers are likely to engage with innovative future programs designed to build strong viable industries, businesses and region/ rural communities.

I think that these industry association(s) or bodies could improve the following things -

The question was the only open question in the survey with 97 responses. Some respondents seemed reluctant to criticise the association, even in a constructive manner which may have contributed to a lack of response more generally.

The comments received could be broken down into four key categories:

1. Government interactions - the relationship with government was referred to specifically. The relationship / interaction issues were specifically about departments and/or agencies, but also generally. Respondents made reference to specific issues and were quite colourful in expressing themselves. The respondents that made these comments were openly dissatisfied with what they describe as the treatment by government, for example *"What's the point? There has been a continual erosion of the fishing industry through politics and fishers see no point in trying to establish a long term future in the industry"*. One respondent referred to the inability to question fisheries science and the desire, but inability, to *"change the relationship"* with researchers. Others wanted to see a firmer stance taken by industry with the various natural resource management agencies, particularly over the development of marine parks. But the comments did not only refer to fisheries related departments and agencies. Some fishers referred to coastal development issues e.g. marinas and desalination

plants. Many fishers see themselves facing a long list of issues that continue to grow, but where their rights and interests are being eroded. As discussed above, the authors of this Report believe there are two issues: (i) the need to strengthen industry capacity to respond to the threats and challenges to industry and (ii) the erosion of commercial fishing access and rights over the past 15-20 years or so.

2. Communication - The issue of communication was raised by many fishers who were primarily talking about the need to increase communication to members. There were suggestions that there should be greater face-to-face communication on key issues, but there were also some suggestions about written information for licence holders on "*all aspects of fisheries*". But most comments were not prescriptive; rather they only suggested "*more communication*" or "*simplify information*". This aligns well with the need for associations to focus on the essential roles identified by respondents ensuring they are delivered without exception.
3. Association governance - there were a number of respondents that wanted to see greater transparency within their association; others just had personal issues with other fishers. Many of these issues are in the realm of governance: these issues may be resolved by regularly changing board/committee members or improved training of those board/committee members. Financial matters should not be questioned if there are clearly defined and agreed roles and responsibilities for the staff and the organisation from the outset.
4. The roles of associations - drew more specific comments referring to the following areas:
 - a. Lobbying: lobbying or colloquially "*get some balls*" was raised numerous times by respondents. Many fishers consider that associations have not lobbied hard enough on their behalf.
 - b. Negotiation: many fishers referred to government negotiations. Respondents not only spoke generally, but also referred to specific departments or agencies and about specific issues.
 - c. Promotion: *industry promotion* was raised by a number of respondents. This highlights again the results found for the 'roles of the association' which showed that quite a number of respondents considered industry promotion to be a critical association activity.
 - d. Marketing: marketing was raised as an area that associations could improve upon. But there was a mixed response on this; given some sectors such as the Clarence River Fishermen's Co-op have a marketing role, while most groups currently do not. Fishers that do work with a co-operative specifically say that the associations should increase their focus on the government negotiations and lobbying rather than the development of markets etc, but is this a role for a co-operative? Associations could look to partner with marketing groups to help sector develop marketing plans or approaches rather than taking on the marketing themselves.

Key Messages

- Respondents, who were primarily association members, are generally happy with the services and activities of associations.
- Key areas for improvement:

- Interaction with government –the way they engage on issues of management and development will require a shift within government and in industry to a partnership style of relationship to progress the co-management approach. Industry must be able to effectively fund its involvement in any progression towards a professional relationship;;
- Communication – associations need to improve the frequency of communications and aim for more personalised methods of communication, e.g. mail merged emails and/or phone calls. But this is likely to require a greater number of volunteers or dollars to support, as it is more time consuming to produce and therefore more costly;
- Governance – associations may need to assess their governance arrangements and structures to ensure transparency. Likewise agreeing on the roles and activities might help ensure the association performs effectively for its member/ sector. The industry must ensure its boards and committees are regularly refreshed and renewed with well trained and resourced fishers.

COMMUNICATIONS

The industry association or body communicates with me via –

There are a number of communication methods used by associations to engage with fishers, but fishers and their associations tend to rely upon two or three key communication methods (Figure 30). Newsletters remain the most common form of communication (162), followed by email (140), letters (137) and in person (133).

Some associations utilised specific forms of communication. For example, the NSW Clarence River Co-op has recently implemented SMS text messaging. The SMS text provides instantaneous and easy access to the members on the price of fish at the co-op and reminders about events. The SA marine scalefish fishers have also successfully used SMS text messaging to call a meeting. The instant nature of the SMS allowed the fishers to leave notification of the meeting to the last moment when it was clear inclement weather would minimise fishing opportunities for the majority of the fishers.

Although there is a shift to more modern methods including email

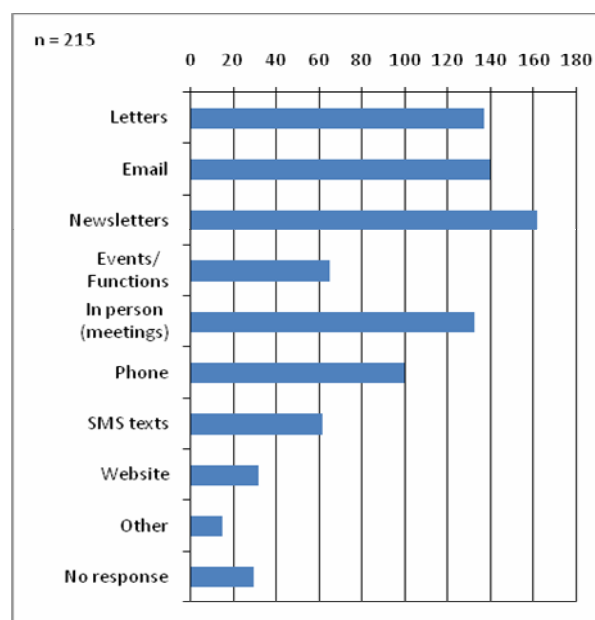


Figure 30: Communication methods utilised by the fishing industry (n = 215).

and SMS text messaging in some associations, these remain the exception rather than the rule due to privacy legislation and the technological uptake by members.

When aiming to communicate with all licence holders, traditional communication methods e.g. mail, remain the only way to ensure they receive the information. Following the “known and trusted” technologies are more effective. This is

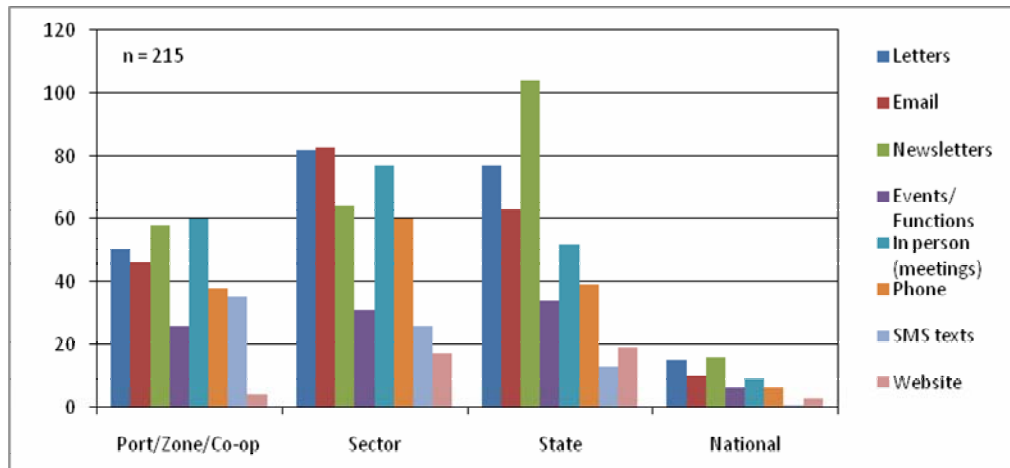


Figure 31: Communication methods utilised at specific association levels (n = 215).

particularly so as the use of computers for a range of activities such as internet banking and communication is low. Previous research into the fishing industry demonstrated that although computer ownership and connection to the internet was high, there was still a very low proportion of the industry that used the computer (van der Geest & MacDonald 2008). It has been common for the authors to ask for a fisher's email address and find the response to be either 'let me get my son or daughter' or 'only the grandkids use it' (pers. obs.). It is important that associations continue to recognise the communication methods used by fishers: fishers use phones or talk at the wharf. Ensuring associations have the resources to ensure a 'presence on the ground' is likely to be critical to the success of the association in the eyes of the fisher. But again this requires additional support in either government funding or processes that empower the fishers and their associations.

Respondents suggest that different communication methods are used at specific association levels (Figure 31). Newsletters are most often used by state level associations, where as more personal communication methods are used at the local level. Sector level associations use a mixture of communication methods but all tend to be more personal and direct methods.

The use of more personal communication with fishers by state or national level associations is less likely given the geographic regions served and the cost of travelling. Nevertheless, all state associations see the value in and use regional meetings to communicate with industry. Given the costs associated they will usually only hold regional meetings when they expect the issue is of sufficient impact to draw a reasonable level of attendance. Respondents suggested that national associations used traditional communication methods. However, the

majority of respondents are engaged fishers which may partly explain how they receive communication from associations.

Enhanced roles for communication used in other primary production sectors, include provision of extension services. The seafood industry has never used a network of extension officers as has other primary industry sectors. The industry has been supported with the SeaNet program, which offers a support service for environmental related issues. The SeaNet service has had to be supported with government grants as the industry has not recognised the need to support such a service through an industry based scheme. Extension services are effective at delivering improved performance for individual enterprises, local, regional or commodity groups. Extension services deliver their benefits through direct communication with producers and the provision of supporting resources. Such extension services do not compete with port, sector, state or national groups but are services offered to producers to enhance their production or business process.

I hear from these industry association(s) or bodies once a –

Communication occurs more frequently at the local and sector level associations becoming less frequent at the state and national association levels (Figure 32). At the local port / zone /co-op or sector level, respondents received communication weekly, but at the state level it was more likely to be quarterly or bi monthly.

However, some respondents heard from state associations more frequently. These respondents generally have active roles within the association e.g. as board members or as the chair/president. It is not surprising that some respondents suggested that they never heard from the national association,

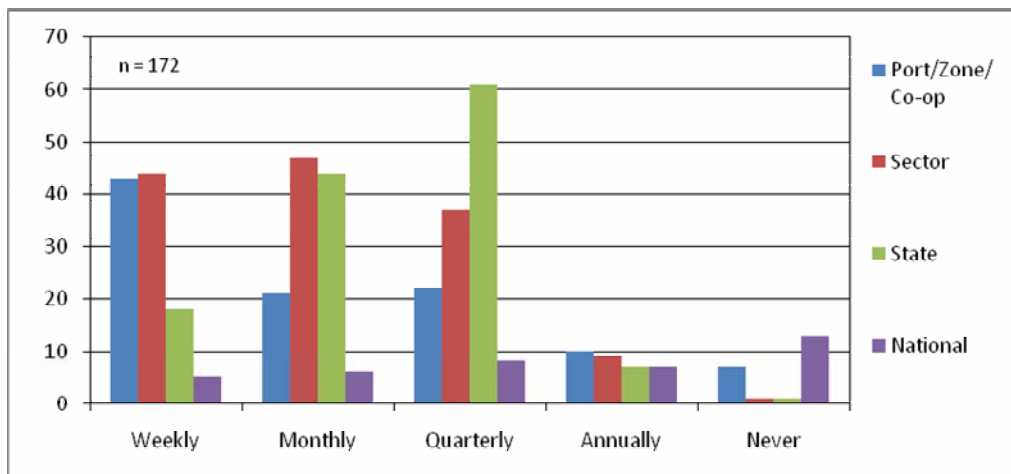


Figure 32: Frequency of communication from associations (n = 172).

recalling that since the demise of the Australian Seafood Industry Council, several years ago, there is no national seafood industry body. At a national level some fishery groups have a body specifically to deal with their common interests for their species or fishery type.

The communication at the local level reflects the closer links to the association with members working along side one another or meeting frequently in less formal processes. In many cases at a sector or state level their representative on the association may well be based in another port or region.

I am happy with the industry association or body communication -

Overall more than 80% fishers were very happy with the level of communication from their various associations.

Communication and information dissemination between associations and fishers is critical for respondents. It was a key reason fishers joined the associations "keeps me informed about industry issues and government policies" and was also considered a key role for associations.

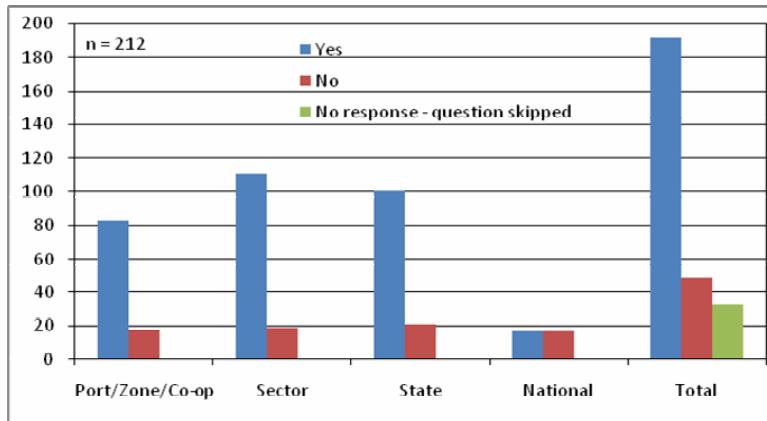


Figure 33: Satisfaction with the level of communication from associations (n = 212).

With the exception of national associations, where respondents were equally as happy as unhappy with the communication, respondents were largely happy with the communication they received from the associations (Figure 33). Overall, there was no request for less communication and where comments were made, greater communication was suggested. As such it would be best for associations to either maintain current communication levels or increase the frequency of the communication.

Key Messages

- For the most part, respondents are happy with the methods and frequency of communication used by associations.
- The level of communication decreases as the association becomes more centralised i.e. at the state and national levels.
- State associations need to consider options for more frequent but less detailed communication to fishers to ensure they understand the range of current issues and the depth of the issues that may impact upon their business.
- Associations need to be resourced to enable effective engagement with fishers. Suggestions include: (i) an 'industry liaison' or extension role delivered at a state or national level, (ii) financial support, or (iii) policies that support associations e.g. with the collection of industry development levies. This would help disseminate information, research, best practices and therefore provide a direct link for the fishers to associations.

- Associations should look to establish communications tools at all places, or at least key points, where fishers gather or use facilities– e.g. wharves, processor establishments or transport hubs.

FUNDING

My preference for paying for the industry association is -

While membership payments to state associations was preferred to be paid through licence fees (compulsory collection) this was only supported marginally more than through direct payment to the association (48 to 46 respectively). This was significantly different for sector and port / zone / co-op associations where the clear preference was for payments directly to those associations directly at the sector level (Figure 34).

There were very few licence holders that wanted to pay through another association or with a product levy. However those that did, talked of the importance of ensuring that all licence holders were contributing to the benefits that traditionally only a few fishers were paying for. When respondents were questioned about paying a single membership which then covered their membership to other associations, many respondents said they wanted to choose which associations they supported, implying that these fishers wanted a greater level of control over their association membership.

While it was not surprising that a large proportion of respondents wanted to see the membership collected in the licence fee. This approach is currently not supported by governments in some states (South Australia, New South Wales, and Queensland). For most associations, this was the traditional method of collection and with recent changes in legislation or governments; some governments are no longer collecting these funds. For some associations, the membership revenue has dropped by up to 80% which has greatly reduced the ability of the fishers to maintain an active voice with government. This seems to be incongruous with the principles of co-management. If fishers want membership collected through

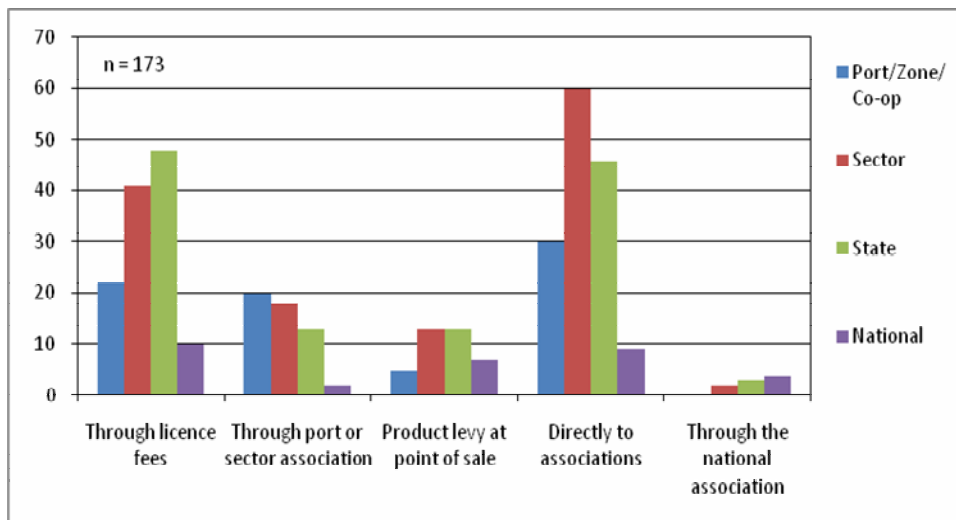


Figure 34: Preferences for paying membership to associations (n = 173).

licence fees and this can be demonstrated with a majority vote, then government should be supportive.

Secure funding support for associations would help ensure the industry has an effective means of engaging with governments and managers. This support would ensure it can be an effective partner in developing and implementing sound resource management approaches and best practices in a co-management framework. This approach would provide greater support for industry to help meet government legislative responsibilities and equally important the communities expectations for sustainable fisheries management. Although there is a consistent rhetoric about fisheries co-management, the move from the traditional 'command and control' to a 'delegated' model will require some effort towards developing a true partnership between fishers and government based upon well resourced industry bodies.

Key Messages

- Fishers are looking for an easy way to pay for membership to associations. The method is not as important as ensuring that all licence holders are contributing to the services delivered by the association.
- Governments need to assist associations to collect membership from licence holders in order to underwrite a true partnership approach to resource management. This will ensure associations have the ability to have effective discussions and effectively deliver on the delegated responsibilities.

Industry support for associations through revenues collected as a component of the licence fee should be supported by governments wherever it is demonstrated to have majority industry support

FURTHER DEVELOPMENT

Within the fishing industry, licence holders are predominately older males, 45-54 years old. Many fishers have been associated with the industry for many years, often generations. Fishers also tend to be more conservative by nature and can have limited education which, when coupled with limited exposure to other industries, leads to limited exposure to innovation occurring in other industries. The above characteristics are likely to influence the way the fishers interact and relate to their associations and therefore how the industry operates more generally.

There is a clear need for better understanding of the multiple layers of associations. There can be at least four (4) layers of association can add to the confusion over roles and responsibilities for the different layers leading to a failure to join associations;

The separation of roles from a port or co-op level of focus through to a much broader multi sector focus across state or national issues needs to be better explained and understood by industry. The need to have an effective relationship with government means fishers need to recognise that this can only occur if the association can speak effectively and with a mandate from the industry. Failing to support associations merely undermines the capacity of those bodies to influence change. An association can only be as effective as its members and board or committee allow it to be.

It can be difficult to engage with fishers, even though it is critical to the success of associations and the industry generally. Fishes are very reluctant to engage unless there is some immediate and tangible benefit to them or their business. For many years fishers have been 'consulted' but have not had the ability to influence key decisions on their future or that of their business. The widely held belief at a grass roots level is that consultation equates to a 'done deal' by government and where something is lost by them. It is difficult to engage many fishers in associations and with government resource management processes in the absence of a strong and genuine negotiation process.

There is a need to develop specific organisational improvement processes to support industry associations. Those processes should ensure succession e.g. a maximum length of consecutive tenures for executive roles within associations, which would: ensure a shared workload among members. Improved processes should provide opportunities for exposure and skills to a greater number of fishers. Increasing involvement of other fishers will provide access to alternative expertise from within grassroots industry, and allow shyer fishers to take on roles that they would otherwise not take on.

Association performance can be improved in key areas, including: (i) their interaction with government, (ii) they are a healthy well resourced industry bodies, (iii) improved frequency of communications, (iv) a reassessment of governance arrangements and transparency and (v) agreeing on the roles and activities expected of it by its members.

Leadership training is a critical component to support effective industry associations, but the training may need to involve development of teams as opposed to individual leaders. The training must be strategic, with not only self nominations but also nominations from peak bodies or associations. Programs need to more effectively support fishers from less lucrative or less successful industry sectors. Developing capacity of the less successful sectors within the industry is imperative for the future and supports a stronger industry able to support itself at every level of association. The Barossa Valley 'Young Ambassador' program could provide a worthwhile model to consider for the seafood industry. A program like that used in the wine industry would also assist integration of generations, ideas and energy while developing a stronger association and industry team.

With the potential for a paradigm shift to true fisheries co-management, there also needs to be a significant shift in industry capacity to generate true partnerships, trust and an equal voice. Negotiation and communication training should be delivered to all resource managers, both government and industry to ensure they are able to effectively and transparently negotiate outcomes. Developing strong competent and professional associations is in the best interest of the resource and resource management agencies. If there are going to be industry / government partnerships and the delegating of aspects of resource management then there must be a stronger, more transparent and supportive approach that assists industry associations engage in these activities and with the fishers themselves.

Associations need greater support from industry to build the resources necessary to engage with all fishers. Assisting associations to engage with fishers could be through funding for an industry liaison/extension role at the State peak industry body level. This support for specific activities designed to engage all fishers, would help disseminate information, research, best practices and therefore provide a direct link for fishers to associations. The industry liaison/extension role could also increase the personalised communication fishers seek from associations.

A key component of engaging with fishers has traditionally been through the national Seafood Directions Conference. Unfortunately, Seafood Directions has not attracted significant numbers of grassroots fishers. Many fishers suggested the Conference was too expensive to attend, particularly when accounting for the travel costs and the lost fishing revenue while attending. A national conference is a great way to explore issues and provides excellent networking opportunities, but there needs to also be a better way of providing this information and exposure to fishers in regional and rural Australia. A series of State or national road shows, in addition to, or rather than, the national conference may provide better opportunities for fishers. Regional road shows may encourage greater participation, attract fishers that would otherwise not attend the national conference, encourage continual learning and provide greater potential for innovation through exposure to different activities and possibilities. Respondents have suggested that *negotiation* and *representation* with government together with communication are key roles for associations. Limiting the scope of the organisation to what the members want may help reduce association workloads,

allowing associations to better facilitate outcomes which may in turn encourage greater membership.

There is significant confusion at the grass roots fisher level about the role and activities of the various industry associations. Industry associations may need to re-consider the structure of associations, particularly in terms of membership payments. Alternatively, associations need to continue to educate fishers on the role of each of the associations and how each of the associations levels work together to ensure better outcomes delivered on the ground for their businesses.

Associations should also consider the types of activities they undertake. A collaborative approach is likely to lead to improved benefits for the industry as organisations are likely to work more efficiently, particularly if all organisations work together to develop strategies to achieve agreed objectives. The greatest benefit is likely to be for fishers, as there would be a clearly defined structure for the operation of the various associations. If the associations were able to effectively engage with one another it is likely that the overall resources would eventually increase as there is considerable duplication currently.

Fishers do not generally see a role for themselves in the direction or management of the association. Respondents are happy to fill roles such as representing members, sitting on boards and/or committees but believe that employees are responsible for setting the direction of the organisation. Overall, fishers do not have strong ownership of the association it is critical for the long term success and development of the industry that fishers build their capacity to take the lead role. Building capacity of fishers through effective succession planning will expose a greater number of fishers to effective association management. Regularly turning over executive positions ensures that a greater number of fishers understand the broad range of roles and expectations for associations, while sharing the workload and developing their own skills and the expertise of the industry.

Fishers are looking for an easy way to pay for membership to associations and so they generally support processes that capture contributions from all fishers. The funding method may not be as important as ensuring the funding is from all licence holders to contribute to the services delivered by the association, provided it is secure and exists while the majority of industry support it. Governments may need to assist associations collect membership from licence holders in a true partnership approach to support improved resource management processes through the ability to have effective discussions with all licence holders and for the association to effectively deliver on the delegated responsibilities under a co-management framework. To achieve this, the funds must be collected and fully allocated to the appropriate association in full, to then have a component provided to the next level of association up or down the hierarchy.

Based on an initial perception of the information provided in the survey process the major reasons for non-participation by fishers in industry associations seem to be:

1. Multiple levels of associations cause confusion among fishers.

2. The governance of industry associations lack professionalism, and so fishers elect not to join. This weakness of governance leads to an inability to effectively engage with government.
3. Industry associations are perceived to be relatively powerless when relating to government.
4. In many cases there is no exclusive benefit in joining where membership is voluntary. Free-loaders often get as much benefit as those few who put in the hard work as they also benefit from any improvements in the performance of a fishery, markets or other broad areas such improvements in government policy and legislation.
(Note: These thoughts are based solely on reading the Report and before consulting the spreadsheets or survey instruments)

Possible solutions:

1. The collection of a compulsory levy as part of annual licence renewal is a central platform for Government's in order to ensure industry associations are empowered to effectively deliver a professional service in support of the industry when working with governments.
2. A compulsory levy or funding scheme should also provide for funding of (i) marketing and promotion of product, (ii) R&D into all aspects of the industry, and (iii) compulsory professional training for all association executives and CEO's.
3. Licensed fishers, under a compulsory levy or funding scheme, should automatically be members of their local industry association, state and national association. Any compulsory levy be applied either to:
 - a. the regional association; and likewise up the chain to national associations for each fishery type, and one national peak body for the whole of the commercial fishing industry; or
 - b. the fishing industry nationally being supported through a funding or levy scheme and that funding then flows down to the state and local associations.
4. Specific roles are defined for each association, at its respective level, with no overlapping of roles between associations at different levels.
5. Constitutionally underpinned succession planning, including mentoring of younger members to take on leadership roles, mandating that participation in association governance is a condition of association membership, and compulsory leadership renewal.

At the appropriate level associations provide continuing professional development and training to executives and fishers.

The following recommendations are made based on the findings from this work.

Communication

- Associations need to be supported with secure funding from fishers for greater resources to be used specifically for more frequent and personalised communication with fishers.
- Associations should establish a liaison / extension role within each State representative association to support improved communication.

- Development and/or utilisation of new communication technology and methods to aid faster, more efficient methods of communication between associations and fishers.
- Communication must be frequent, succinct and straight forward to ensure fishers read and, if required, respond to the correspondence and be able to provide input into or influence their association's strategic direction.
- Associations need to implement more effective feedback mechanisms for fishers to the association. Fisher feedback will help ensure fishers feel they are more directly involved in the work of the associations.
- The poor attendance of fishers at the national Seafood Directions Conference, despite its value to the industry, suggests that it is important to take the information to the fishers regionally. A road show would provide greater access to, and for, fishers while significantly reducing the cost to the fishers.

Governance

- Fishers need to definitively determine the roles and objectives for their association through effective periodic strategic planning. The strategic planning process must clearly outline what actions will be used to achieve the goals and objectives.
- There is a need for a governance 'training' program for fishing industry associations. Most fishers do not have a thorough understanding of their responsibilities pertaining to the effective management of organisations. Governance training could be a combination of formal training and informal strategies such as mentoring for new board members.
- Associations and the industry generally, must adopt constitutional reforms that force succession planning throughout the industry. Limiting the period of and number of consecutive terms of executive positions has been shown to develop stronger more innovative associations in other successful industries/communities. The current research suggests that the fishing industry should follow suit in order to develop a more vibrant, energetic and innovative industry.
- Fishers must take greater ownership of their associations and employees must be seen as a support to the association rather than being responsible for setting the association's strategic direction.

Association Structure

- Associations, with assistance from government agencies, need to implement compulsory funding strategies that ensure payment from all licence holders to support effective industry representation.
- Associations at different levels need to implement formal strategies to support one another. Delineation of roles and a single funding strategy would reduce the confusion at the grassroots industry level. Delineating the roles within the hierarchy of associations is likely to reduce the individual association workload. Moreover, successful association partnerships may also increase the efficiency of the associations in the future too.

- Associations should focus on representation, information dissemination and government negotiation as core roles. They also need to develop a stronger focus on industry promotion and profiling.

Capacity Building

- Leadership training needs to be strategically funded directly by associations and other funding bodies to ensure that fishers from less lucrative or successful industry sectors are supported to complete the training.
- Leadership training needs to be developed for teams within industry. Given the apparent disengagement within the industry, it is important to empower more than one person from a sector to help maintain the energy required to overcome what can be the insidious negativity within the industry.
- Leadership graduates and the industry would benefit from having a formal placement program, like that successfully implemented in the Barossa Valley wine industry. Placement of graduates may help integrate the leadership learning's for the graduate and for the mainstream industry. Moreover, it is likely to improve industry succession planning.
- Formal mentoring programs need to be established within the fishing industry. Mentoring would expose fishers to alternative options for their sector and business. It is likely to develop a stronger network between industry sectors which may help develop a stronger sense of 'team' amongst the industry generally.

General

- Enhancing industry's role in management and development requires communication and negotiation training be implemented into resource management training programs to ensure that future industry leaders and resource managers have the capacity to effectively negotiate outcomes.
- Moving many industry sectors forward, particularly under a co-management framework, will require industry to resource itself to be an effective partner. Strong industry capacity will be critical to the long term success of the commercial harvesting of fisheries resources in Australia.

PLANNED OUTCOMES

The project findings will provide industry associations and bodies with a clearer understanding of what fishers think and expect from their supporting bodies. This understanding should enable industry organisations to better focus their roles and activities in order to be able to present their services and roles to fishers in order to gain greater support and capacity to deliver the range of benefits that it seeks to offer the industry.

This project should provide associations with the basis for further pursuing funding options that will deliver greater capacity to effectively represent industry or deliver services that can be provided by industry focussed organisations.

The types of funding strategies for industry bodies to pursue should now be able to be better defined within the plans and strategies developed to demonstrate their purpose and secure support from fishers using the understandings gained from the drivers for fishers involvement or participation.

Industry groups should now have a clearer understanding of what is expected of them by fishers regardless of how they are funded. This should lead to be better designed and more effective industry bodies with skilled fishers having the capacity to provide high quality leadership.

CONCLUSION

The project sought to identify the drivers for fishers taking up membership, or not of their various industry associations. It is clear from the findings that there are a range of areas of service and support that fishers consider important in deciding whether it is worth investing in an organisation.

This survey was able to identify that:

- Members of industry associations are more easily engaged, with only 28 survey respondents not being a member of any association;
- The majority of respondents were members of their local association but not necessarily of the State or National associations (where one exists);
- Many respondents are members of two associations;
- A significant proportion of respondents failed to recognise their multiple memberships in State and/or National associations where these were funded by contributions from another level of industry association membership;
- Most respondents were passive members: reading materials and attending meetings as opposed to being on boards and committees etc;
- Of the people that did sit on the boards and/or committees one third of these fishers held two or more positions;
- There is only a small pool of fishers contributing to the work of the industry and associations. Without effective succession planning and leadership training for the future, associations and the industry will continue to struggle;
- Fishers join associations in order to have their business interests represented and to stay informed about government activities, processes and negotiations;
- Respondents, who are primarily members of associations, are generally happy with the services and activities of those associations;

The project was unsuccessful in obtaining a significant response rate from fishers who were not a member of any association. It did establish that the key reasons for non membership were:

- Cost of membership, particularly cumulative cost of multiple memberships;
- Lack of perceived benefits delivered by associations; and

- The number and multiple layers of associations.

In order to provide a better service to fishers and the industry more generally it will be important that fishers have access to better communication processes with their representative bodies. These processes must provide for more frequent and personalised communication to better outline the challenges their industry face and the activities being undertaken on their behalf to better secure their interests and rights.

Communication needs to be more effective, timely and succinct to encourage fishers to access information, but there needs to be a move towards more modern, cost effective methods of communication. This communication must be effective both ways in order that fishers feel confident to have more input into the issues being dealt with by their representative bodies.

There depth of issues and challenges facing the fishing industry is not always well understood and activities such as Seafood Directions needs to developed to enable more fishers to understand its important role in assisting industry to identify those issues and in setting a direction for dealing with them.

In order for industry bodies to improve their relevance to those that fund, or should fund, them it is important that fishers are more effectively engaged in key roles such as determining the strategic direction for these bodies. This involvement will improve the level of engagement with and by fishers, but also ensure that the work the organisation undertakes is in keeping with the wishes of the fishers and industry overall.

An area for improvement in performance for industry organisations is with governance and leadership of its various bodies at every level. With improved governance approaches industry bodies will be better able to relate to those they seek to represent, in so doing they will open themselves up to greater levels of interest and involvement by the many fishers who are at present only slightly involved, or often completely uninvolved in their representative bodies.

In order to promote improved participation and involvement it will be important that interested fishers have clear mechanisms that encourage them, and at the least provide a path for them, to improve their involvement and develop their interests in their industry and business. Many industry organisation needs to review their constitutional provisions to ensure they don't just talk about succession but ensure that it happens. There is little incentive in most organisations for new blood to be directly involved and to build their level of participation. This must change, as a key impediment to increased participation is the view that, rightly or wrongly, those "in charge" are too firmly entrenched in their position to be replaced. A requirement to limit consecutive terms in any one position in an organisation encourages greater interest and involvement. This does not mean those with a genuine involvement need to forgo their commitment, but the need for strong mentoring and leadership training means those with interest and skills should be using them to build a broader base for the future of their business and industry.

Associations need to be supported with structures that will ensure that all those who benefit from their activities must be directly contributing to them. This

requires government's to acknowledge that in order to be effective partners in fisheries management processes, such as co-management, industry has to be effectively funded to engage with all interest holders and to be able to communicate with them in order to ensure they are engaged in the management process.

There needs to be an acknowledgement that while the four layers of representative bodies all have a place in the service of industry interests, it is important that their roles conflict and that each is seen as filling its niche. In order to deliver value for money to industry it will necessary that the various layers work more closely together and that they service their local or sector interests at a level that they can best provide outcomes or benefits. The layers of organisations need to effectively partner one another and share resources to provide effective outcomes at the best price for fishers.

Associations need to focus on their core roles and in all cases look to improving industry promotion and profiling in order to better support the need for a viable, sustainable and efficient industry that provides a value service and product to meet the community's expectations from the seafood industry.

While there are several leadership development options they need to be better understood, promoted and fishers need to be given stronger incentives to participate. The building of stronger mentoring programs that provide opportunities for fishers to learn from other primary industry groups will enhance the level of innovation within the industry.

Participation in the fishery management process will become more important as we move into the next phase of co-management. This will not only require well resourced industry bodies but those bodies will need to have well developed fishers who are able to engage effectively in the management processes. The need for the industry to demonstrate it can be an effective partner can only occur when the industry body is able to effectively fund its involvement from within the industry itself. As with other management cost, this cost must be borne by all who participate and may benefit from the management outcomes. This will bring with it greater levels of accountability and industry participation.

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APPENDICES

Appendix 1 – Intellectual Property

The intellectual property in this project is owned jointly by the FRDC and Wildcatch Fisheries SA.

The nature of this report was to provide information to fishing industry bodies and other beneficiaries on “Understanding the drivers for fisher engagement with industry bodies”. This information is for use within public domain research and it is not anticipated that any commercial intellectual property will arise from this project.

Appendix 2 - Staff

Wildcatch Fisheries SA wishes to thank the following people for their assistance, support and input to this research program.

Bryan Denning

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Appendix 3: Building Strong Associations Survey

Building Strong Associations

Introduction

Wildcatch Fisheries, in conjunction with the Fisheries Research and Development Corporation (FRDC), are undertaking a survey to understand the reasons why fishers do or don't join industry associations.

The number of commercial fishers around Australia has declined in recent years. There has also been a significant decline in the membership of industry associations.

This survey aims to understand the reasons why fishers do or do not join associations. The results collected from the survey will be used to inform industry and industry associations at all levels of how they might better tailor the services offered in order to meet the needs of the members.

The feedback you provide in this survey is strictly confidential. Results will only be displayed in aggregated form and Wildcatch Fisheries SA will not provide any of your information to any other source.

We greatly appreciate the time and insights you provide in the survey.

If you require any further clarification regarding the project or would like to complete the survey in person, please contact Claire van der Geest on 0403 707 105.

Please return your completed surveys to
Wildcatch Fisheries SA
PO Box 2099
DC Port Adelaide SA 5015

Thank you for your help.

1. My postcode is

2. I am

Male Female

3. My age is

15-24 45-54
 25-34 55-64
 35-44 65+

Building Strong Associations

4. What fishing sector(s)/ fishery do you participate in?

<input type="checkbox"/> SA Abalone	<input type="checkbox"/> SA Marine Scalefish	<input type="checkbox"/> SA West Coast Prawn
<input type="checkbox"/> SA Blue Crab	<input type="checkbox"/> SA Miscellaneous	<input type="checkbox"/> SA Northern Zone Rocklobster
<input type="checkbox"/> SA Charter Boat	<input type="checkbox"/> SA GSV Prawn	<input type="checkbox"/> SA Southern Zone Rocklobster
<input type="checkbox"/> SA Commonwealth	<input type="checkbox"/> SA Spencer Gulf Prawn	<input type="checkbox"/> NSW Clarence River Cooperative
<input type="checkbox"/> SA Lakes and Coorong	<input type="checkbox"/> SA Sardine	<input type="checkbox"/> Tasmania
<input type="checkbox"/> Other (please specify)		

5. Are you a member of any fishing industry associations?

Yes No

6. If yes, which ones?

<input type="checkbox"/> Port/ Zone Association/ Cooperative	<input type="checkbox"/> State Industry Body
<input type="checkbox"/> Sector Association	<input type="checkbox"/> National Industry Body
<input type="checkbox"/> Other (please specify)	

7. My association membership is

Full membership Associate membership Affiliate membership

Building Strong Associations

8. I am an association member because it

	Port/ Zone Association/ Cooperative	Sector Association	State Industry Body	National Industry Body
Has helped me in the past	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Protects my business interests - "a good insurance policy"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provides my business with key services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provides opportunities for training and development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Represents my interests on issues affecting my business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Keeps me informed about industry issues and government policies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify)				

9. I am not an association member because

	Port/ Zone Association/ Cooperative	Sector Association	State Industry Body	National Industry Body
I don't see any benefit for my business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
There are too many associations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
They don't do anything for me or my business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
It costs too much	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
They expect me to give up too much time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I don't have the necessary skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
They don't need my contribution	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify)				

Building Strong Associations

10. My level of involvement in these industry association(s) or bodies is

	Port/ Zone Association/ Cooperative	Sector Association	State Industry Body	National Industry Body
None - I am not a member of the association(s)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Paying membership only	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reading materials provided and staying informed on key issues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Responding to letters, emails and phone calls	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Participating in scheduled meetings and information sessions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sitting on the Board/ committee/ sub committee in a decision making role	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify)	<div style="border: 1px solid black; width: 100%; height: 100%;"></div>			

11. I participate in these industry association(s) or bodies boards, committees or sub-committees because

	Port/ Zone Association/ Cooperative	Sector Association	State Industry Body	National Industry Body
I want to have input into the direction of the industry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No one else would do it	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I have some good ideas that I think would assist the industry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I want to build/ maintain a profitable business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I want to protect my assets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not applicable - I don't participate in the association (s)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify)	<div style="border: 1px solid black; width: 100%; height: 100%;"></div>			

Building Strong Associations

12. I don't participate in these industry association(s) or bodies boards, committees or sub-committees because

	Port/ Zone Association/ Cooperative	Sector Association	State Industry Body	National Industry Body
I have no time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Some fishers take over and I can't have my say	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I see no point in participating	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
It costs too much to miss fishing and travel to meetings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I don't have the skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I don't have the experience	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I don't like the people making decisions in the association	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I don't feel confident	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The association has not helped me in the past	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify)	<div style="border: 1px solid gray; padding: 2px;"> ▲ ▼ </div>			

13. I want to have input into the direction of these industry association(s) or bodies?

	Port/ Zone Association/ Cooperative	Sector Association	State Industry Body	National Industry Body
Yes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

14. I believe I have the opportunity to have input into the direction of these industry association(s) or bodies?

	Port/ Zone Association/ Cooperative	Sector Association	State Industry Body	National Industry Body
Yes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If no, please tell us why?	<div style="border: 1px solid gray; padding: 2px;"> ▲ ▼ </div>			

Building Strong Associations

15. I think the role of these industry association(s) or bodies should be to

	Port/ Zone Association/ Cooperative	Sector Association	State Industry Body	National Industry Body
Gather and distribute information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provide political representation (e.g. lobbying)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provide advice, support and networks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Negotiate with Government (e.g. maritime safety)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Represent me on marine park and other conservation issues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Represent my interest for fisheries management and science	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provide me information and/or opportunities for training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Promote the industry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provide opportunities for industry development (e.g. marketing)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provide expertise and skills to assist my business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify)	<input style="width: 100%; height: 100%;" type="text"/>			

16. I think the role for fishers in the association is to

	Port/ Zone/ Association/ Cooperative	Sector Association	State Industry Body	National Body
Direct the work of the staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Get additional membership from the fishers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sit on boards, committees, and/or sub-committees representing the industry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assist staff to deliver to the broader industry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provide information to the industry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Get feedback from fishers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Represent members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify)	<input style="width: 100%; height: 100%;" type="text"/>			

Building Strong Associations

17. Are you happy with the services, activities, etc, provided by these industry association(s) or bodies?

	Port/ Zone Association/ Cooperative	Sector Association	State Industry Body	National Industry Body
Yes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

18. I think that these industry association(s) or bodies could improve the following things

19. The industry association or body communicates with me via

	Port/ Zone Association/ Cooperative	Sector Association	State Industry Body	National Industry Body
Letters	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Emails	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Newsletters	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Events/ functions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
In person (meetings)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Phone calls	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SMS text messages	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Website	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify)	<div style="border: 1px solid black; height: 30px; width: 100%;"></div>			

Building Strong Associations

20. I hear from these industry association(s) or bodies once a

	Port/ Zone Association/ Cooperative	Sector Association	State Industry Body	National Industry Body
Week	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Month	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quarter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Year	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Never	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify)				

21. I am happy with the industry association or body communication

	Port/ Zone Association/ Cooperative	Sector Association	State Industry Body	National Industry Body
Yes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If no, please tell us how you want the association to communicate with you?				

22. My preference for paying for the industry association is

	Port/ Zone Association/ Cooperative	Sector Association	State Industry Body	National Industry Body
Through my licence fees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Through my port or sector association	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A product levy collected at the point of sale	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Directly to each association	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Through the national body	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify)				

Building Strong Associations

Thank you for completing the survey. Your support, insights and leadership are greatly appreciated.

The Fisheries Research and Development Corporation through the Tactical Research Fund supported the project. The aims of the project are to build stronger industry associations and therefore a stronger Australian commercial fishing industry with a vibrant and prosperous future.

The results of this survey are being collected to benefit Australian commercial fishers by developing more effective industry associations. Profitable seafood enterprises, in partnership with effective associations, can ensure a dynamic, innovative industry leading the way for other primary producing sectors.

The project is due to be completed by the end of March 2009. For a copy of the project outcomes, including the report you can contact Wildcatch Fisheries SA (08 8303 2717), your local association or body, or directly from the FRDC website (www.frdc.com.au). Alternatively provide your contact details below and we will forward a copy directly to your email inbox.

Thank you once again and happy fishing!

Claire van der Geest

23. Contact Details

Name	<input type="text"/>
Mobile	<input type="text"/>
Email	<input type="text"/>
Time taken to complete the survey	<input type="text"/>

Appendix 4: Reviewer's Report

Research Review: The Drivers of Fisher Engagement

Research Review: The Drivers of Fisher Engagement

**Conducted by
Ian Plowman Pty Ltd
July 2009**

Research Review: The Drivers of Fisher Engagement

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Research Review: The Drivers of Fisher Engagement

INTRODUCTION

FRDC commissioned an independent review of a draft research report entitled 'The drivers of fisher engagement in their representative associations', authored by van der Geest C and MacDonald N.

The terms of the independent review are:

1. A desktop review of the draft report, with an assessment of whether or not the reviewer would have come to similar conclusions, based on the content of the report.
2. Sample 10% of the survey response to confirm that the report is an accurate portrayal of those responses.
3. Look at the data analysis and draw independent conclusions, comparing those conclusions with those in the report.

The reviewer is an organisational psychologist, social scientist and facilitator who works with a range of clients, many of whom are associations in the primary industry sector. The reviewer's research into innovative primary industry associations led to the invitation to undertake this task.

The reviewer goes beyond the initial brief by

- (a) Offering observations about the structure and readability of the document as a piece of research.
- (b) Offering suggestions that go to the heart of the researchers purpose – how to make the fishing industry more healthy.

DESKTOP REVIEW OF DRAFT REPORT

The starting point of the review is to (i) ask why the research was conducted, (ii) examine the research report to assess whether the methodology would be likely to answer the research questions, and (iii) to see if the conclusions follow logically from and addressed the research questions.

Comments are then made about the draft report itself, followed by recommendations by the reviewer.

(i) Why the research was conducted

The objectives of the research are alluded to in the Executive Summary and the Background of the Report. It is not until P18 of the document that they are actually spelt out, as follows:

Thus it is important to recognise what drives fishers to participate and more critical to understand the reasons why others remain disengaged from the industry so that effective measures can be implemented to build the capacity of fishers to overcome economic, environmental and social challenges facing the industry. To this end the specific project objectives were to:

1. *Understand the drivers for uptake and non-uptake of individual voluntary membership of representative organisations;*
2. *Understand the issues affecting membership of representative organisations;*
3. *Assist sectors to identify and develop guiding principles that enables strong membership for representative organisations; and*

Research Review: The Drivers of Fisher Engagement

4. *To identify strategies to build organisational capacity to provide and demonstrate value to members.*

Three observations are offered here.

First, it is recommended that the purpose of the research and hence of the report be spelt out at the beginning of the document, particularly in the executive summary. The old army logic is (a) tell them what you are going to tell them, (b) tell them, (c) tell them what you told them.

Second, the research objectives, in my opinion are not clearly expressed. To me, objectives 1 and 2 both seem to be saying the same thing, while objectives 3 and 4 also seem to be saying the same thing. Paraphrasing what I think the objectives appear to be, it is these:

1. To understand why licensed fishers do or do not join their industry associations,
2. To understand how fishing industry associations can make themselves more attractive and valuable for current and potential members.

The issue of clarity of the research objectives goes to the heart of the reviewer's task. If I do not understand what the research objectives actually are, if I have misunderstood the intent of the four statements of objective, then I cannot fulfil my reviewer's task of assessing whether those objectives have actually been achieved by the research and the subsequent Report.

Therefore, I can only proceed with this task, guided by the assumption that my two paraphrased objectives are correct.

Third, in providing background to the research questions, there is one glaring omission: Why is this research deemed necessary? The research report contains lengthy explanations about disengaged fishers, unhealthy industry associations, and limited membership. Yet it is short on spelling out the precise nature of the problem or provide any supporting data on the following:

- (i) How many licensed fishers are there? (There is a figure of 1,227 licensed fishers mentioned on p26 of the document. It is not mentioned elsewhere).
- (ii) How many licensed fishers were there 10 years ago?
- (iii) How many licensed fishers are members of industry associations?
- (iv) How many were members 10 years ago?
- (v) What are the percentages and what are the trends?
- (vi) Is the rate of decline in membership greater or less than the decline in number of licensed fishers?
- (vii) What is the role of the associations? Are they defined? Are those roles adhered to? Do the members understand these roles? How does an association interface with its members? What are the benefits an association offers its members? (The Report covers this topic, though could perhaps do so more tightly).
- (viii) What is the price paid for being a member of an association? Is there a fixed cost? Is there a variable cost pro-rated on catch volume or value? Are there different costs for different associations? If I am a member of several associations in a hierarchy (ie port, sector, State), do I pay the same for my sector membership as someone who is only a member of the sector association? Apart from the financial cost, are there other expectations of me as a member? – (meeting attendance, an expectation that I'll serve on the Board, etc.)
- (ix) How are associations structured and governed? Is there a Board? What is its size and composition? What are the Board tasks? What is the function of employees? (This is

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briefly touched on in the Report. Given that the issue of associations is central to the research, these questions should be examined more tightly).

- (x) With multiple associations, often in a hierarchy, looking after the interests of fishers, how are the relationships and responsibilities between various associations structured? What is working in those relationships and what is not?
- (xi) What are the mechanisms through which the industry engages with Government? Are those mechanisms widely understood? Do those mechanisms work?
- (xii) What are the parts of Government that the industry interacts with? What are the responsibilities of Government as they pertain to the fishing industry? How are those responsibilities executed? Are there laws and regulations that are State specific? Are there National laws and regulations?

In the absence of this information, it might be the case that the decline in membership is (a) less than the decline in number of licensed fishers, (b) equal to the decline in licences, or (c) greater than the decline.

To understand and address the research questions, it is also essential to know the costs of association membership (financial and otherwise) and the benefits that associations provide back to their members. In other words, what is asked of members? And what is given?

The Executive Summary could begin with something like the following:

There are 1,227 licensed fishers in Australia, of whom X belong to industry associations, a percentage membership of Y%. Over the last 10 years, the number of licensed fishers belonging to industry associations has declined by Z%. Membership of an industry association involves (insert a brief summary of costs and obligations). Governance of the associations is (insert a brief summary). The mechanisms by which the industry interfaces with Government are (insert a brief summary). The responsibilities of Government as they pertain to the industry are (insert a brief summary).

The summary information leads the researchers to address two questions:

1. Why is association membership in decline?
2. What can the industry and its associations do to arrest and reverse these trends?

- (ii) **Assessing whether the methodology would be likely to answer the research objectives.**

The methodology used in the research is clearly spelt out and appropriate to the task. The researchers clearly went to extraordinary lengths to capture the necessary data. The researchers obtained the support of a steering committee, people who hold responsible positions within the industry. It is not possible to tell if these people possess extensive professional research experience, though it is suggested the research might have been structured differently if it had.

One omission, easily rectified, is that the survey instrument is not included as part of the Report. Therefore, it is not possible to tell, from the draft Report alone, whether the methodology would have addressed the research objectives.

The Report comments on response rates. It is normal in research to indicate how many surveys were issued and how many replied. Although the researchers used multiple methods, three of those were measurable: (a) surveys mailed out; (b) phone calls made, where a request was made to call back, and (c) surveys handed to people to complete. What was the total number of these? What is the percentage that 247 replies represent? (Note, the researchers do provide percentages for a

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number of fisheries and noted that none of an unspecified number of calls to members of a Tasmanian fishery called back.)

It is noted that the survey instrument mentions three different classes of membership: full membership, associate membership, and affiliate membership. The Report does not comment on these three classes, or the relative proportion of fishers that belong to each. The data is captured on the spreadsheets, though it appears not to have been analysed. This omission might lead to important insights being overlooked.

(iii) Assessing whether the conclusions follow logically from and address the research questions.

The Report contains what seems to be a mixture of primary data (gathered specifically for this research, using the survey/interview), secondary data (gathered from research conducted by others, that has relevance to this research), and authors' opinions.

Unfortunately, the way the draft Report is presently written, it is often difficult for a reader to differentiate between the three. The Report would have greater clarity if the three different categories were more clearly flagged. It is generally advisable for the authors' opinions to be kept at arms length, allowing the primary data to speak for itself. This reduces the likelihood of accusation of researcher bias. By all means, given the authors' wealth of experience in the industry, it is fine for them to express their opinions. Just keep them completely separate from the primary data, and then label them as 'Researchers' Opinions'.

The draft Report conclusions do not crisply deal with the research objectives. Observations about the Conclusions section of the document include:

- (a) The Conclusion could begin by restating why the research was conducted and what its objectives were. At present it does not.
- (b) The Conclusion could describe how the primary research data answered those questions. It does this partially, though in a somewhat rambling and non-precise way, so that it is not necessarily clear which paragraph is responding to which research question.
- (c) The Conclusion brings in a number of new ideas that have not been canvassed earlier in the body of the draft Report. This is to be discouraged. The function of the Conclusion is to draw together a number of observations and arguments that have already been made in the body of the draft Report. The new material, which is valuable, should be transferred to the body of the Report.
- (d) The Conclusion makes a number of recommendations. The reviewer observes that the body of the document makes a number of insightful observations that could very easily be converted to recommendations, yet which often do not appear in the Conclusion's recommendations. Great ideas are therefore lost. It is recommended that the authors extract from the document all those insights that would make excellent recommendations, and then make those recommendations against each of the research objectives.
- (e) Throughout the Report, and repeated again in the Conclusion, there is a thread of inference that the reasons for non-engagement by fishers in associations are the fishers fault: they are apathetic, they are unintelligent, they are poorly educated, they are conservative and suspicious, they are free-loading. There is also an inference that it is the Government's fault, since they ride rough-shod over the industry without genuine engagement, that the consultation is token, and that decisions are a 'done deal'. Although alluded to throughout the document, the 'elephant in the room' appears to be the associations themselves. The complexity of associations, the lack of clarity over their respective roles, the voluntary

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nature of levies, internal dysfunction often caused by personalities, and the absence of any industry peak body with whom the Government can partner, all seem, to this reviewer, to be central to the two research objectives.

There are a number of errors of logic throughout the draft Report. For example, P 2, in the Executive Summary states: *The reasons for the disengagement primarily relate to the mentality of the fishers and their perceived treatment by and their relationship with government.* Yet there are other reasons reported throughout the document. To say that the mentality of the fishers and the relationship of the industry with government are the primary reasons for non-engagement requires hard evidence, and yet little is provided. It should prove relatively easy to provide, in the Report, concrete real-life examples of the Government's relationship with industry has been unsatisfactory from an industry perspective and which has led to the disengagement and frustration of fishers. Providing hard evidence of 'the mentality of fishers' might prove more problematic. The Reviewer found very little evidence supporting the claim that this is one of the primary reasons for disengagement.

Based on my reading of the document, and before looking at the primary data (the completed survey instruments) and the analysis, would I have come to similar conclusions as the authors? I think not. Referring to the quote in the previous paragraph, the content of this Report does not lead me to believe that the 'mentality of fishers' or the 'relationship with government' are the primary reasons for disengagement. Both of these reasons, while possibly contributing, act as bookends to what appears to be the central issue, namely the absence of professional governance within the industry. This comment is based upon (a) my reading of the document, (b) my professional opinion as a psychologist, (c) my research into innovative primary industry associations, and (d) my consulting experience working with a number of associations, including from the fishing industry.

My summary comments on the first research question – why fishers choose to engage or not - is this:

1. There is no evidence in the document that quantifies the problem. So the nature, scope and trends related to association membership or otherwise by licensed fishers are unknown.
2. Industry associations are perceived to be somewhat powerless, relative to government. There appears to be no National industry peak body with whom Government can partner. (It is unclear if there are State peak bodies.) This would seem to be a major strategic weakness on the part of the industry, a weakness that is in their power to rectify.
3. Multiple levels of associations and diverse voluntary methods of funding cause confusion and inequity among fishers.
4. The governance of industry associations lack professionalism, a reflection of the available pool of independent and relatively unskilled people, and so many fishers elect not to join. This weakness of governance contributes to an inability to effectively engage with Government.
5. There appears to be no exclusive benefit in joining industry associations. Free-loaders get as much benefit as those few who put in the hard work (with the possible exception of the Co-op).

Possible solutions, responding to the second research question of what the industry and its associations can do to arrest and reverse these trends (and I acknowledge that there may be (unknown to me) sound reasons why these may not be feasible):

1. The collection of a compulsory levy from all fishers as part of annual licence renewal,

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2. The compulsory levy to fund (i) marketing and promotion of product, (ii) R&D into all aspects of the industry, and (iii) compulsory professional training for all association Board executives and CEO's.
3. Licensed fishers, through the compulsory levy, are automatically members of their local industry association, say at Port or Sector level. Therefore, each local association has access to contact details of every licensed fisher in their fishery. Each local association is obliged, based on number of members, to pay a compulsory levy to the regional association; and likewise up the chain to national associations for each fishery type, and one national peak body for the whole of the commercial fishing industry.
4. This national peak body to establish close partnership ties with Government.
5. The mechanisms by which Government engages with industry to be clear, effective, and broadly understood.
6. Specific roles are defined for each association, at its respective level, with no overlapping of roles between associations at different levels, unless by clear agreement. These roles and responsibilities to be broadcast to all licensed fishers.
7. No fisher is a member of any association other than the local association. Only associations from the level below can be members of the level above.
8. Constitutionally underpinned succession planning, including mentoring of younger members to take on leadership roles, mandating that participation in association governance is a condition of association membership, and compulsory leadership renewal.
9. Board Executives, in all but the local associations, must have had prior experience on the Board of the level below. Short elected terms, say two years, coupled with compulsory turnover, ensure that the governance responsibilities are shared broadly.
10. Associations to pay very close attention to the quality of communication between fishers and themselves and vice versa.

(iv) Reviewer's comments on the Report as a research document.

The report is a concerted effort, by people immersed in their industry, to research and report on an important industry issue. The end result reflects a summation of the data gathered, as well as a number of observations that go beyond the data gathered and which reflect the opinions and experiences of the authors. Sometimes the reader of the Report will have difficulty disentangling what is data and what is opinion. The credibility of the Report will be increased by making very clear (a) what the primary data is telling us, (b) what the secondary data is telling us, and (c) what is conjecture, personal opinion, and ideas based on the authors' personal experiences within the industry?

Further, the structure of the research, the subsequent Report and the manner in which it is written suggest that research is not the primary skill of its authors. Hence seeking an independent review of the draft report by an impartial researcher from outside of the industry is a good idea. For future research, it is recommended that the FRDC seek the inclusion of an experienced researcher in the research team. It is easier to design in the necessary rigor than it is to have that rigor retrofitted.

The services of a professional editor to review the penultimate document will ensure the document makes greater impact upon its readers. Currently the surface structure (what the reader tends to notice – spelling errors, poor grammar, etc) can distract from its deep structure (what the authors are endeavouring to say). English expression needs to be tightened up to improve comprehension; logic and internal contradictions need to be rectified; long complex sentences need to be broken into smaller sentences; punctuation needs critical review. All this would substantially increase the

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impact of the messages on the reader. At the moment, those messages are at risk of being lost, as the reader is distracted by the ambiguity and lack of clarity in some sentences. After professional editing, a reader's attention will then be able to focus solely on the authors' message. The reviewer has made 294 observations/suggestions in the margin of the original draft, as well as considerably editing throughout the document.

As mentioned earlier, arguments offered in the Report would be strengthened if statistics and background information could be provided. For example, what are the costs being asked of a fisher in belonging to an association? And what are the benefits derived from that membership? Further, what is the percentage decline in the number of licensed commercial fishermen in the last ten years? What is the percentage decline in association membership in the last 10 years? Which of these two percentages is greater? The absence of information on the number of licensed fishers in each of the fisheries surveyed, and the absence of information spelling out the proportion of licensed fishers who are members of their associations is a weakness of the Report that might easily be rectified.

The Report tells us that there are 1,227 licensed fishers, 245 respondents of which 28 were not members of associations. Therefore 217 were association members. What is the total number of association members? What proportion responded? What is the total number of licensed fishers who are not members of those associations? What proportion responded? These are central questions in this research. Figure 5 offers some of this information. I suggest these figures actually be spelt out, perhaps in Table form.

The Report alludes to failure by some fishers to join the association. Yet it says very little about what membership involves. It is essential to understand what is being asked of potential members, and what benefits they might receive, before one can gain an understanding of why some do and some do not join.

The Report alludes to the complexity of associations, yet does not give any picture of this complexity. A couple of diagrams would help the reader to understand the complexity that some fishers face and which appears to bewilder some of them.

The Report also alludes to an unsatisfactory relationship between the industry and Government, yet it does not describe the mechanisms by which that relationship is conducted. Are there State or National peak bodies? Are there Ministerial Advisory Councils? How do these relationships work? What are the jurisdictions and responsibilities that Governments hold in relation to the industry? How are these executed?

There are a number of places in the document where the authors make general statements, some noted as personal observations. Although these statements might well be true, they could reflect personal bias. The case would be strengthened if examples or supporting evidence were provided.

Errors of logic in the document are frequent. For example, on p47, the authors state:

Unfortunately, the fishers that did not respond demonstrate a resounding result also: that the level of apathy within the fishing industry is extraordinary, but it does not provide any indication of whether that apathy relates to the services of the association or is a combination of a number of key elements including the industries relationship with government. Sorry; failure to respond does not

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demonstrate apathy in the industry. The authors have already said that a number of respondents found the survey instrument too complex. All that can be said, about a lower than desired response rate, is that any explanation is only conjecture. Nor can you talk of a level of apathy. The authors have already said that the mix of associations is confusing. The Report has already alluded to personality issues and executives who have held positions for too long. Neither of these necessarily generate apathy. Perhaps given what is being offered by the industry in terms of benefits is not sufficiently enticing for busy people to bother to pay the cost. The inference from the 'apathy' comment is that fishers are to blame. Perhaps it is the industry governance structures that are to blame. Or more likely there will be multiple reasons ranging from personal circumstances to frustration with Government.

Note that in the above extract, the authors suggest two unproven reasons for 'apathy'; one being related to the *services of the associations*, the other being the *industry's relationship with government*. Both of these go beyond the data; therefore mentioning these two specifically is unnecessary. Yet it probably reflects the authors' opinion (otherwise they would not have been mentioned). A less than discerning reader might fail to recognise that there could potentially be dozens of 'reasons' for the so-called 'apathy', not just the two mentioned.

The Executive Summary is currently insufficiently tight or succinct. It needs to be rewritten to clearly reflect:

- The objectives of the research,
- The target of the research (eg licensed fishers from the following fisheries (list them). State how many. State what proportions belong to industry associations. State the trends, over the last 10 years, in number of licence holders and the number of association members. (Only with this information will the reader understand what the issue is.)
- The background to the research, summarising the apparent problem and providing supporting facts on fishers, on associations, and on government.
- The principles findings relative to the research objectives.
- Recommendations arising from the research, as they apply to the objectives.
- (Optional) Researchers' recommendations, not directly based on the survey data, though informed by it.

Similarly, the Conclusion needs to be tightened up, as mentioned earlier.

SAMPLE 10% OF THE SURVEY RESPONSE TO CONFIRM THAT THE REPORT IS AN ACCURATE PORTRAYAL OF THOSE RESPONSES.

It is noted that the survey instrument was designed by members of the reference panel, then pilot-tested. It is not clear if the pilot-testing was by randomly selected members in the research pool, or by a more homogeneous convenient sample. This may have narrowed down the nature and scope of questions asked. It is quite common for research of this type to begin with focus groups that begin with a very open question, such as: 'Tell us about industry associations and membership?' When such focus groups are conducted with a number of randomly selected samples of the target (and, by the way, this can easily be done by email), then key themes are likely to emerge. Those themes are then converted to questions built into the survey instrument.

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Note that all but one of the survey questions are closed questions, suggesting that the possible response categories were predetermined by the research panel. Does the use of closed questions preclude respondents offering the real reasons for their behaviour? The free-response option at the end of some of the questions provides a clue as to whether the survey instrument was sufficiently open-ended to permit all possible responses.

It is more usual to provide scaled response options. For example: on a 1-5 scale – (1) very unhappy, (2) unhappy, (3) neither unhappy nor happy, (4) happy, (5) very happy. Closed questions, such as those that solicit category responses or yes/no answers preclude shades of response. Respondents often wish to say more than a closed response permits.

Survey question 7 asks about three classes of membership. The reviewer did not see these three classes mentioned in the Report. So there may be important insights here that the Report has missed.

On Spreadsheet 1 and Why Member, the order of responses for Q4 on both spreadsheets is the same, yet both differ from the order of possible responses on the survey instrument. (It is unknown if the paper copy of the survey differed from that in Survey Monkey). The same applies to Qs 6, 8, 9, 15, 16, and 19. This leads to the real possibility that a data entry operator might insert responses into the wrong columns. Case 8 data entry illustrates how a string of errors does result.

On Spreadsheet 1, Q16: the role of fishers/State Industry body – this column contains no data. It does in the identical subsidiary spreadsheet.

I began checking a sample of surveys against the spreadsheet. This proved to be a problematic exercise, since the survey instruments are not numbered. So there is no way of being absolutely sure where the survey chosen sits on the spreadsheet (although postcode and age together seem to give a reasonable guide). Therefore, rather than randomly choosing 24 instruments, I began by examining surveys as they sat in the box full of original instruments sent to me. It appears as though the order of entry is the same as the order in the box, from top down.

Case 3 (the first entry) appears to be correctly entered on Spreadsheet 1. Yet, on the Spreadsheet entitled State, the age is entered as 55-64, not 35-44. Contact details are not recorded on the spreadsheet.

Case 7. Sheet 1, response omitted to Q14. Yet is correctly entered on the subsidiary Opportunity for Input spreadsheet. As with Case 3 above, this suggests that data has been entered twice, not copied from the original data set, Sheets 1 & 2, into the subsidiary data sets. It would seem very unusual to enter the data twice, once on summary spreadsheets, then again on subsidiary spreadsheets. The reviewer is unable to tell which data sets were used for the calculation of results: Summary Sheets 1&2 or the subsidiary sheets. No contact details have been recorded on the spreadsheets.

Case 4. Correctly entered.

Case 5. Correctly entered.

Case 6. One of three fishing sectors not recorded.

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Case 8. Question 8. Why Member Sheet and Sheet 1: Data entry error. Q15. Six data entry errors. Q19. Three data entry errors.

Sorry. Have just double-checked and discovered the problem. There are **two different versions of the survey!** In some, the order of the response options to Qs 15 and 19 is the same as the Spreadsheets. In others, the order has changed. Taking the top bundle of surveys from the box, **26 out of 63 were in the wrong format** and these are mixed in with the correct ones. These errant survey forms can easily be identified. On the front of the questionnaire, the word 'Introduction' is preceded by the number '1'. Data entry operators get into a rhythm of key stroking, not necessarily being conscious of what they are entering where. If every survey is the same format and the spreadsheet columns correspond, then no problem. If there is a second version of the survey that does not correspond to the spreadsheets, there is a very high probability of the data being incorrectly entered. This appears to have happened here. Therefore, I recommend that the data for the mis-formatted surveys will need to be re-entered, particularly for Qs 15 and 19. Since the hard-copy forms are not numbered (at least the date of data entry is noted) great care will be needed to know which cases need to be re-entered. Of course, the analysis of the data for those questions will also need to be revised.

Note: On recognizing the issue of mismatch between Spreadsheet columns and Survey responses, I stopped checking the sample for accuracy. Having fully checked only six survey responses and found **only two of them error-free**, I would suggest one might be a little dubious of the accuracy of data entry. If the errors are few and random, it will make little to no difference to the overall analysis. The systemic error of the different version of the survey is, of course, another matter entirely.

LOOK AT THE DATA ANALYSIS AND DRAW INDEPENDENT CONCLUSIONS, COMPARING THOSE INDEPENDENT CONCLUSIONS WITH THOSE IN THE REPORT.

The spreadsheets of research data were examined, paying particular attention to the open-ended responses provided. Free-response comments provide greater insights into the minds of respondents than do closed questions.

The Report suggests that: *The reasons for the disengagement primarily relate to the mentality of the fishers and their perceived treatment by and their relationship with government.* (Executive Summary – second paragraph).

If this were the case, one might expect to see some evidence in the free-response comments from the 247 survey participants. Those free-response comments are provided in the appendices of this Review.

Below is a summary of the open-ended responses provided to the survey questions:

1. I am an association member because it ...

Fifty eight free-response comments offered by 247 respondents. Main themes were

- Membership provided direct benefits to their business: 19 respondents. Most of these were from the Clarence.
- To have a unified voice: 16 respondents.

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- Government: 7 respondents, 4 of those seven talked of the need to 'stand up to Government', 2 comments were neutral, and 1 talked of a positive relationship with Government.
- Personality issues in relation to associations: 2 mentions.
- To be kept informed: 2 mentions
- Only one respondent mentioned the nature of fishers, saying: *Others don't join because it's the way people are. Fishers are just like that, being "individuals" is the weakness of the fishing industry.*

2. I am not an association member because

Twenty eight free response comments. Main themes were

- Poor association governance and personality issues: 6 responses
- Recent entrants or were in the process of exiting the industry: 6 responses.
- Costs: 4 responses.
- Membership gave them no value: 3 responses.
- Having family members who belonged to associations and kept them informed: 3 responses.
- Had given enough in the past to their association and were now tired and worn out: 2 responses.
- Dissatisfaction over loss of access: 1 mention.
- There was only 1 mention that might be identified as 'mentality of fishers'; that comment pertaining to getting benefits for free.
- Similarly there was only 1 mention that alluded to the 'perceived treatment by and their relationship with government'.

3. My level of involvement in these industry association(s) or bodies is

Twenty six 26 respondents given free-response comments. Main themes were

- Having served in industry or committee roles in the past – 16 mentions.
- Reference to current industry roles that people hold – 5 mentions.
- Personal family circumstances that precluded them holding industry roles: 2 respondents.

4. I participate in these industry association(s) or bodies boards, committees or sub-committees because

Thirty one free-response comments offered. Main themes were

- Desire to make a contribution and give something back – 15 mentions.
- To stay informed – 7 mentions.
- Being involved because 'Not many fishers are willing to take on positions': 3 mentions

Note there were no mentions pertaining to government and its treatment of the industry.

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5. I don't participate in these industry association(s) or bodies boards, committees or sub-committees because

Fifty eight free-response comments offered. Main themes were

- Time to give younger fellows a go – 14 mentions
- Politics and in-fighting within the associations – 12 mentions
- General disinterest – 12 mentions
- Personal or family reasons – 8 mentions
- The perceived cost in time and money – 5 mentions
- Frustrations with government – 5 mentions
- Complexity of associations – 2 mentions

6. I want to have input into the direction of these industry association(s) or bodies?

No free-response comments recorded on the spread sheet.

7. I believe I have the opportunity to have input into the direction of these industry association(s) or bodies? If no, please tell us why?

Forty free-response comments offered. Main themes were

- That the government doesn't listen/understand: 12 mentions
- Dysfunctionality within the association: 10 mentions

(Note: There appears to be an emerging thread of opinion that not only does the Government not consult effectively with the industry, the Boards of some associations seem to be a closed shop that does not consult with its members.)

8. I think the role of these industry association(s) or bodies should be to

Forty seven free-response comments. Main themes are:

- Providing a unified voice for fishers: 18 mentions.
- Negotiate with government: 11 mentions.
- Marketing: 6 mentions.
- Providing information back to fishers: 5 mentions
- Education/training/mentoring of fishers: 5 mentions

9. I think the role for fishers in the association is to.....

Forty seven free responses were given by respondents. Main themes seem to be:

- Be an active participant and supporter of the industry: 26 mentions
- Be united: 13 mentions.
- Pay membership: 9 mentions, with compulsory membership mentioned 3 times.

10. Are you happy with the services, activities, etc, provided by these industry association(s) or bodies?

No free-response comments provided on the spreadsheet.

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11. I think that these industry association(s) or bodies could improve the following things

Ninety five responses received, the highest number of free-responses provided to any question. Further, the length of the responses, were, on average, greater than those provided for other questions. These two factors suggest that respondents had a lot of energy for this question and that it is tapping into issues that are important for them. Most frequently mentioned themes are:

- Need to improve the industry's relationship/lobbying with various levels of Government and Government agencies: 23 mentions.
- Marketing and promotion: 16 mentions, including 1 who said associations should not be involved in marketing. Others held the opposite view.
- Need for improved communication with members and fishers: 12 mentions.
- Issues about governance of associations/Boards/management: 11 mentions.
- Confusion over the complexity and costs of multiple associations: 9 mentions.
- Compulsory fee/levy: 6 mention, including 1 who argued against it.
- The need for industry unity: 5 mentioned.
- Support for younger members: 3 mentions.
- Stricter controls over amateur fishers: 2 mentions.

12. I hear from these industry association(s) or bodies once a

Forty one free-response comments. None of them add anything to the research questions.

13. I am happy with the industry association or body communication. If no, please tell us how you want the association to communicate with you?

Thirty five free-response comments. Most frequent themes are:

- Need for better quality and more frequent communication: 14 mentions.
- Dissatisfaction about the governance of associations: 7 mentions

14. My preference for paying for the industry association is...

Sixty four free responses; the second highest number of responses. Main themes were:

- Leave things as they are: 27 mentions
- Compulsory levy: 14 mentions
- Pay to a single body: 8 mentions
- Voluntary levy: 6 mentions

Summarising the responses across these 14 questions, the most frequently mentioned themes were:

- Cost and benefits of membership (including levy): 82 mentions
- Relationship between industry and government: 59 mentions
- Dissatisfaction with association governance: 48 mentions

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- Presenting a unified voice: 47 mentions
- Communication between association and members: 40 mentions
- Marketing and promotion: 22 mentions
- Confusion over the complexity and costs of multiple associations: 11 mentions

The Report recommendations, in the Executive Summary, are clustered into the following themes: (i) communication, (ii) governance, (iii) association structure, (iv) capacity building, and (v) general. So the Report Executive Summary captures some, though not all, of the themes that appear to emerge from the free-responses. Not surprisingly, they come to conclusions similar to this review.

Based on the free responses given to the survey questions, it appears that these are the topics to which fishers are most sensitive, and to which attention needs to be given, if membership is to be increased. They support the Report's conclusion about the importance of the industry's relationship with Government. They do not support the Report's conclusion pertaining to 'the mentality of fishers' (though the Report's comments on fisher biographic data are certainly relevant). The Report would be strengthened by commenting more specifically on (a) costs, benefits and equality of membership (which is touched upon briefly in the Report, under Association Structure), (b), the value of a unified voice and whether it exists, (c) and marketing and promotion. Note that the Report recognises and deals adequately with the quality of the communication between fishers and industry, with need to improve association governance, and the complexity and confusion of multiple industry associations.

CONCLUSION

The researchers have done a fine job of capturing a considerable volume of data that talk to the health of the fishing industry in Australia. That data will cue the industry as to where substantial gains can be made, for the benefit of the members, the associations, the industry and the nation.

The Report contains a number of weaknesses that can be rectified, thereby improving the document considerably. Given the immense value contained within the data and the Report, making the changes suggested by this review will enhance the readability and hence the impact of the Report.

Data validity is uncertain. There are data entry errors. Two different versions of the Survey instrument results in at least two of the questions being in a format different from the data base into which they were entered, thereby rendering problematic the subsequent data analysis. This will need to be rectified.

I thank the researchers and the FRDC for the opportunity to conduct this review.

Ian Plowman, PhD

Psychologist, Facilitator and Social Researcher.

12th July 2009.

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I am an association member because it:

- I thought it might help
- Be unified
- Trust the general manager - straight up and down working for the industry, you know where you stand.
- Be supportive of the process that helps maintain my business.
- Because everyone's in it. Be a single voice for the sector.
- Cohesiveness within the industry. To be a single voice.
- The previous chair left so I rejoined
- You gotta have a voice
- Have a say
- Because it is progressive; best to have one voice; for the betterment of the prawn fishery
- Over the last 10 to 12 years I believe that the appointment of the SARLAC executive officer has not worked in the best interest of the fishermen as a whole but only to the financial benefit of the Executive Officers own pocket'. This is because he was an expert at manipulating people to achieve his own agenda. I know many fishermen who will not join because of this and from now on it will be very hard to change their minds. Also some Presidents believe they are God's gift to the industry, and go off on their own agenda and not that of the members.
- Better outcomes - being unified, single strong voice for industry
- Others don't join because it's the way people are. Fishers are just like that, being "individuals" is the weakness of the fishing industry.
- Associations should help, so being unified and getting better outcomes is critical to the outcomes of the industry
- Someone has got to do the talking on behalf of the industry
- Because others join so I do too
- Participate in the industry sector and State in both catching and management
- Essential for unification
- Someone has to; collection of people: strength in numbers means greater probability of better outcomes.
- Unified voice for fishers means better outcomes for my business (hopefully!)
- But it doesn't really matter when political outcomes are at play!
- See things done right for industry, e.g. management and access issues
- Because I hold a commercial fishing licence
- I feel that I have got to be in it to have a voice for the industry and for my business interests
- Because as a commercial Abalone diver I believe it is compulsory
- Because the interaction with other Members improves my own business. This is the case with tuna where keeping abreast of innovation by others is important.
- Compulsory, easier for ice, bait and discounts on the chandlery.
- Convenient sale of product, services and better prices for fuel, ice and chandlery supplies etc.
- Benefits of the ice, the facilities are close to home.
- Convenience of selling the product.
- Compulsory, sale of the fish.

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- Because it is compulsory; and for the benefits: ice, fuel, no waiting around. Unfortunately there is no better price for the product.
- Sell product
- Convenience of the sale of the product
- Sells product
- Sell product - co-op for the ice, transport and fuel
- Been a member all my life; because of the member benefits
- Selling product - especially the by-product
- Especially "keeping me informed about industry issues and government policies"
- Good for business
- No other option and its easier for the services
- Selling product through the co-op
- Because I am a fisherman
- Especially the "represents my interests on issues affecting my business"
- Because you have to be a member to weigh in - compulsory membership if you want to weigh in at the co-op.
- Believe it is the right thing to do
- Have input into the structure and direction of the association, the commercial dive association has stronger leadership with Bryan as president
- Have a say
- TSIC - its compulsory TCDA - because I feel that I have experience to offer the younger fishers, there are a lot of divers that are young and fairly new to the fishery.
- Staying informed
- Although I have never gained in the past, in fact I have lost on every occasion. Government seems to be listening to the associations finally - so I'm in it!
- Because it provides assistance with the government.
- Voice with government; benefit for members - collective marketing, services, ice, fuel etc
- Helps fishers fight battles with government
- Helps deal with government institutions who are not supportive of fishers.
- Someone to stand up to the government
- One needs a strong state body to keep PIRSA on the straight and narrow.

Note: Fifty eight free-response comments were offered by 247 respondents.

- Membership provided direct benefits to their business: 19 respondents. Most of these were from the Clarence.
- To have a unified voice: 16 respondents.
- Government: 7 respondents, Four of those seven talked of the need to 'stand up to Government', two were neutral, and one talked of a positive relationship with Government.
- Personality issues in relation to associations, or the independent mindedness of fishers.: 3 mentions.
- To be kept informed: 2 mentions

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I am not an association member because

- I have been unable to make enough money to afford the expense. Changes to fishing regulations have meant an increase in costs and a lack of access in particular to cockles for bait and the cost associated with the retrieval, when now only 10kg a day can be harvested. Increasing ill health has meant a lack of ability to work the extent that I would like to and because I have only a single licence I am unable to employ a relief skipper.
- With other costs going up all the time, I have to save somewhere.
- Port Mac is run by a minority.
- I belong to a limited number of associations and affiliations because to operate even a small business, there is an abundance of organisations seeking your membership. These organisations then overlap others, leading to more meetings, licensing, more bureaucracy and red tape. E.g. if I wish to operate a small tourism charter boat business that targets fishing and diving, it could be argued that I need to join: (1) the charter boat operators associations; (2) the professional association of diving instructors; (3) an eco tourism association; (4) tourism kangaroo island and (5) the national tourism accreditation. Further more you need: (1) a licence from PIRSA and report to SARDI; (2) a licence from Transport SA, (3) a licence from PADI (dive master), (4) a licence to skipper a vessel, and (5) with the advent of Marine Parks a further level of licence and bureaucracy is also likely to appear when DEH takes on the responsibility for them. Each of the industry associations that you belong to during the course of the year hold meetings, workshops, seminars and strategic planning days. They are usually held at a time and place that makes it impossible for those that live and work in regions to attend. To be an active and financial member of these different industry associations requires a commitment of time that is likely to have a detrimental effect on your business - "there is simply not enough time in the day".
- Intend to be
- Don't see any value
- Costs too much to be a part of all of them
- Due to my health
- Only recently purchased the licence and have not yet approached any association.
- We sold our Blue Swimmer Crab Fishery business 15 months ago but I considered it was absolutely paramount to be a member and to be aware what was happening in our sector association.
- I don't like how the people in the association were operating. I don't like the set up - specifically the payment through Corvel and the amount of money spent on marketing in the US.
- I have not thought about it as yet.
- Other don't join because they are older and they've seen too many things (rights, access etc) taken off them and they are tired and cynical and ready to retire and give the game away.
- Other don't pay membership because there is confusion about the different associations, about which one is the best one and what each of the associations does.
- Selling out of the industry - trying to anyway.
- A combination of laziness plus a feeling that I have contributed too much time, effort and money in the past and really deserve a spell now.
- Too busy fishing. My father is a member and the president.

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- I used to be president but was victimised. I got sick and tired of being the only person doing anything for the association and then being bagged out for doing it... "only doing things for self interested reasons"
- I believe that others don't join because they don't see value in the association; they reap the rewards without paying. Membership should be compulsory, but it is also human nature - some people just don't want to pay for anything!
- Don't actively use the licence - misc. dive licence
- My husband is a member of msna & mfa and I hear everything from him.
- I am such a minor player now days and my inputs would be so very minimal. The license owner and industry association are always forthcoming in providing relevant information to my operations. The license owner has more a vested interest, is a member and represents my views where appropriate.
- As a member of the SFMC for years I saw first hand how committee mismanagement was corrupted by a few wealthy people.
- Being a member of the MFA association most of what I am informed of comes from them. It is too expensive to be a member of two associations.
- The person running the association was out of order on the water.
- Specific issues are not well dealt with - e.g. snapper management; the fishery is not unified; no value for my business; there is no proactive work; and it does not meet my business interests.
- SARLAC under Roger Edwards only worked for the benefit of Roger. He had big ideas that were designed to get money for his services and very little benefit to industry. Examples are Southern Rock Lobster Limited, USA marketing. Clean green was alright until he linked that to pot to plate and the contract that took all rights away from the fisher. You can not be responsible for all losses after you turn your fish over to SRL until the end purchaser and wait 60 plus days to be paid. Marketing is not for associations who only think they know best.
- No support for fishermen

246 responses, with 28 giving free response comments. Of those

Six respondents cited issues of poor governance and personality issues as reasons for not being association members.

Six respondents were recent entrants or were in the process of exiting the industry.

Four respondents cited costs as the reason for not belonging.

Three cited that membership gave them no value.

Three respondents had family members who belonged to associations and kept them informed.

Two respondents indicated they had given enough in the past to their association and were now tired and worn out.

Only one responded expressed loss of access and dissatisfaction with the association as being reason for not belonging.

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My level of involvement in these industry association(s) or bodies is

- In the past I spent 18 years in SA and WA in all capacities I now have given it to others to do
- Previously sat on committees
- President of the West Coast Shark Zone and secretary for the whole Shark fishery (all zones)
- Past membership of committees and boards
- Ex treasurer of the Tas Commerical Dive Association
- Previously sat on a committee that reviewed rules
- Again because my husband is Sec. of MSNFA I am MADE to hear what is going on and usually I have a view when discussion any issue in question being debated. I also type any letters or minutes from meetings associated with the Fishing Industry. So I keep myself informed.
- Boards and groups in the past
- Boards in the past
- Only some meetings
- On the co-op board for 5 years
- About to sit on the Ocean trap and line local committee which is a sub group of the co-op arrangements
- Previously sat on Boards and committees for 27 years
- Was very involved in the past
- Don't sit on committees with five small children'
- Use to sit on the committees in the past
- AGM's meetings
- Fill the following roles: Advisory to the Minister; sit on the Seafood Industry Advisory Committee (SIAC), the working groups associated with it and the MACs and also the CRFC executive committee.
- Used to sit on regional advisory committee.
- Currently sitting on the Estuary Prawn and Estuary General committees. Previous sat as a committee member rep on the State Association.
- Sit on the committee for cockle (pipi) food safety.
- For both the commercial dive and the rocklobster fishery, will definitely sit on the boards etc in the future - been a number of deaths in the family in the recent past.
- Was the previous president of the commercial dive association and currently sits on the long spined urchin sub group.
- Abalone - just pay membership. Commercial Dive - president of the association.
- Use to sit on boards and committees and the TCDA as the treasurer.
- Used to be on periwinkle sub-committee.

247 respondents, with 26 respondents given free-response comments. The most frequent comment related to having served in industry or committee roles in the past – 16 mentions. The next most frequent was reference to current industry roles that people hold – 5 mentions. Two respondents cited personal family circumstances that precluded them holding industry roles.

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I participate in these industry association(s) or bodies boards, committees or sub-committees because

- I have participated in the past as president in WA and Vice president in SA, at SAFIC and FMC and many sub committees.
- Everyone is busy
- Have ideas and experience. You need to have a say whether the ideas are good or bad.
- Previously sat on boards and committees
- I recently retired but still own a licence and like to know what's going on. I've been in the industry for 45 years - past president and committee member of the South End Association, SEPFA and Blackfellows Caves Associations
- To keep informed about threatening issues from both inside and outside our industry
- If I was still in the industry the above would be important
- Am in the industry and happy to give back to the industry. Got a bit more time because I am not fishing on the water.
- No one else would do it for the MSF.
- I would like to leave the industry in a better shape than when I entered it. A sustainable fishery for generation to come, this I believe is the duty of all in life.
- I want to have my say.
- I believe that I have something valuable to contribute because of my longevity within the industry.
- To know what's going on in the industry.
- Voted in, but generally reluctant to take on the role because of the work/ time involved.
- Having sold our licence I no longer participate in the association's business, but everything relevant to the Blue Swimmer Crab Fishery interests me.
- I participated through my husband's association with the Industry as a net fisherman's wife.
- I want to be informed of the changes and have input into the direction of the co-op.
- Love fishing and want to look after the industry for the long term
- Change a few things, professional membership to assist industry groups
- Do want to protect my assets - but it much more about the bigger picture for the industry
- I have an interest in the issues and the group
- Industry benefit - help to provide a better deal for fellow fishers, a personal challenge
- Want to protect the industry too. Was asked to sit on the SIAC (it's a Cabinet appointment)
- Take committee views to a higher level and keep up to date with the issues and management arrangements etc.
- Ancillary services for the business: 10% discount on ice, fuel, hardware etc
- Not many fishers are willing to take on positions
- Its part of being in the fishing industry and gives a greater level of information and therefore understanding of issues.
- To support the current president and continue to develop strong leadership
- Share experiences and new ideas

Of the 247 respondents, 31 offered free-response comments to this question. Of this, the majority participate in their industry association because of a desire to make a contribution and give

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something back – 15 mentions. Others participated to stay informed – 7 mentions. Note there were no mentions pertaining to government and its treatment of the industry. There were three mentions of people being involved because 'Not many fishers are willing to take on positions'.

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I don't participate in these industry association(s) or bodies boards, committees or sub-committees because:

- Having led the industry for a number of years and spent countless hours at meetings on behalf of fishers and on phone calls etc, I feel that I have made more than my contribution.
- Live interstate
- A lot of travel to meetings in Adelaide - \$\$\$
- Don't want to
- Been there, done that.
- Cockle quota allocation - majority were against the allocation method, but government bodies responded to a few fishers only and to the fisheries ideas of management - not industry.
- I recently retired but still own a licence and like to know what's going on. I've been in the industry for 45 years - past president and committee member of the South End Association, SEPFA and Blackfellows Caves Associations.
- There are too many associations
- Recently only purchased the licence and have yet to consider the associations.
- The Port Association represents the rock lobster sector, not the Giant crab sector specifically.
- No point with the government department PIRSA.
- I am busy maintaining the books for 2 fishing licences and other business interests.
- I don't want to go on a committee because I don't feel as experienced as other; succession planning; sat on committees historically - time for the younger ones.
- It's not my personality to sit on committees, I'll have my say at the meetings and I'm comfortable with the presentation from the other fishers'.
- I don't want to sit on committees because the government continues to raise the same issues over and over without resolution.
- Done it previously - done my time; Frustration with the government processes and continually circling around the issues.
- I want to go fishing that's why I became a fisherman. It's too complicated now and therefore you need others to help you do the work of the association.
- I am retired - I've done my share.
- I've got a temper that would not help things.
- Distance to the meetings
- I previously sat on the committee but at 75 I think that it's up to the younger fishers (like my son). I like staying informed but it's up to the younger ones.
- Lifestyle choice - constantly on the move
- Selling the licence; don't want to participate in the association as much.
- Previously sat on committee, taking time for fishing, succession planning; let the younger ones have a go.
- Because I am 68, I am in the later stages of my participation in the industry. I want to be a free person: do my own things with my time at this stage of my life.
- I don't participate in the sector committees because it is not my primary fishery and is not key to my fishing business.

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- Because Dad is the president.
- Don't have a lot of committees, give someone else a go.
- Because of the political intervention and subsequent outcomes to the industry.
- I've been victimised in the past and I'm sick of being the shot as the messenger by government agencies and then again by the industry for not getting the desired results.
- Time for the younger fishers to have a go - some succession planning.
- I previously sat on committees, and as such I am just not interested any more. Moreover, other people are more suited to the committees.
- I am at the end of my involvement in the fishing industry. I get too involved in the issues, which means that there is a large investment of time and energy in the committees. I am frustrated by the fishers: some fishers continue to push their pet issues and are very small minded. "Fishers are mostly not the most intelligent members of the community and their inability to unify to get outcomes is dragging the industry as a whole down"
- Politics within the association, some people push their pet issues and personal agendas; the lack of governance arrangements within the association; the money.
- The whole licensing process needs to be looked at. Why does it cost the same for the Marine scale fish licence no matter what endorsements? There are less fishers than 10 years ago yet the same opportunity to participate in all areas are denied a few. I have applied for crab nets to help sustain my livelihood but been refused. Another example where a committee "governs" to suit the committee members and not the interest of ALL fishers. Yet they all want my money. What for? What is in it for ME? A reduced licence fee because I am being denied the fundamental equivalent of other fishers standings.
- I am such a minor player now days and my inputs would be so very minimal. The license owner and industry association are always forthcoming in providing relevant information to my operations. The license owner has more a vested interest, is a member and represents my views where appropriate.
- As an associate member (with over 20yrs experience) I have no clout. No investment financially.
- I am happy with the people/ reps already involved in the association.
- Dropped the committees and boards because of the reactions of fishers, no thanks for efforts and seen as only working for self interest.
- Better things to do with my time. If I got involved, I'd just get "dirty" and the co-op and the number of old fellas. Do not care that much about any of the issues.
- Involved in three fisheries: crabs, prawns and meshing.
- Pressure in the association and some hot headed personalities.
- Health reasons - stress related; succession planning for the industry
- Frustrated with the people pouring shit all over one another and therefore achieving nothing; Tall poppy syndrome that is typical of throughout the industry.
- Not good at school – doesn't feel confident with the roles. Night fisher - more difficult to participate in the meetings.
- Fishermens' attitudes: blaming, fence sitting, no taking responsibility for issues at hand.
- Family commitments etc
- Not educated enough.

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- It can be frustration sitting on the committees when nothing seems to get done or be achieved or solved. I don't feel confident to speak up directly at the meetings: i like to think about the issues.
- No interest in sitting on the committees or boards - happy paying and being a part but not an active role.
- Internal factions fight for self preservation at the expense of minor parties or fisheries or less value.
- We live too far away from our SA Association and previous fisher representatives on sector association were incompetent.
- Fishing is weather orientated. You can't arrange to go to meetings etc when you don't know what the weather will be like on the day. If the weather is good you'll fish.
- Personal commitments
- 7 deaths in the family in the past year or so.
- Because I get along with the other blokes and I agree with them.
- Some fishers push their own agenda history of the organisation - we were asked to vote on issues without having been provided the information to make an informed choice.
- Because I have only been involved in the fishery for the past 8 months.

Of the 247 respondents, 58 offered free-response comments to this question. In order of frequency of mention those comments pertain to:

- Time to give younger fellows a go – 14 mentions
- Politics and in-fighting within the associations – 12 mentions
- General disinterest – 12 mentions
- Personal or family reasons – 8 mentions
- The perceived cost in time and money – 5 mentions
- Frustrations with government – 5 mentions
- Complexity of associations – 2 mentions

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I believe I have the opportunity to have input into the direction of these industry association(s) or bodies? If no, please tell us why?

- If I want to I will, but at this stage I don't want to.
- Live interstate: can not actively participate.
- We vote on one thing and if it doesn't suit the ones in charge, they keep bringing it up until eventually it changes.
- Because the decisions have been made by Fisheries on no input will change their decisions.
- Decisions have been made prior to the meeting most of the time.
- So I can represent our members in port, sector to the state body
- Don't talk the lingo.
- Time constraints, meeting usually held in Port Lincoln, I live in Adelaide region.
- Decisions of industry are only overruled by Fisheries dictation.
- I recently retired but still own a licence and like to know what's going on. I've been in the industry for 45 years - past president and committee member of the South End Association, SEPFA and Blackfellows caves Associations.
- If meetings were held in winter time (June to Sept) maybe I would participate more.
- It doesn't exist.
- It makes no difference and I am over it with the government.
- Yes though my sector association.
- I can have a say at the meetings - but it does no good. The government always does what it wants too irrespective of our input - "co-management what a joke".
- But I am not interested in having input into the dealings of other sectors.
- Depends on what the people want as to what outputs are achieved and therefore the direction of the industry - it never really matters what we say.
- As we are trying to sell the licence so things have change in the past few years
- But there is a worsening situation occurring both with Management and the Industry generally: the industry is over regulated. There is not enough research, there is no consistency in the management; the management is over complicated. There is continual changing of staff within the government management agency: continually building relationships, explaining the history of the fishery, consistently get a new manager pushing their pet issues and ways of managing the resource - continual change and uncertainty. Fishing Industry management needs to be consistent for a period of time and there needs to be a greater long term strategic development of fisheries management.
- But the decisions should be left to those people who are actively fishing and working the licence; this is particularly for the decisions about fisheries management, science, stocks and quota etc.
- But if you stick your neck out, you get more trouble than what its worth: from compliance and government management (being singled out by compliance etc was seen to be an issue and a reason for this person not to participate in the association any longer)
- The voices of a few are the voices that are heard. The preconceived ideas of some do not ALLOW room for other ideas. Too much selfishness within the industry.
- Time for sitting on Boards is not available to me and when I am not sitting on the Boards, I believe that it is more difficult to have input into the direction of the co-op and the industry generally.
- Speaking directly to john or the co-op manager.
- Say something but nothing gets done about it, have meetings with a whole lot of hot air.
- Nothing changes

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- Don't have a say in the operation of the co-op; there are dominate characters sitting on the Board
- But I am often frustrated with the way things are done within the co-op, and it is a very thankless task.
- Co-op yes, but the Board is too old and set in its ways. One person can't make a difference against the masses. No because of the DPI - I want to have more input. Don't see much point sometimes because of the DPI.
- People on the Boards of the co-op (long term member- the manager) are holding the Co-op's development back.
- Yes for the co-op and no - there needs to be more say from fishers with the DPI.
- NO - we don't have much opportunity to have input into the direction of DPI management etc
- Little level of consultation.
- Usually one voice against "recognised" voices, so called experts, usually professional committee members protecting self interest.
- No one will take notice of the MS Line fishers in the MSscale FWG
- Do we have one!!!
- YES because I've made fishing my future and I've invested a lot to be involved in it. So I need to be actively involved in the industry because it's my livelihood.
- Clicky group that doesn't want a "Barnes" in the ranks.
- Will Zacharin and his policy views.
- It depends on how the TCDA goes in the future to whether I'll have input, but at least here I feel that I have opportunity to say some say. I don't know what TSIC does for the money it collects from the licence holders.

Of the 247 respondents, 40 offered free-response comments as to why they did not believe they had opportunity for input. In order of frequency of mention those comments pertain to:

- That the government doesn't listen/understand: 12 mentions
- Dysfunctionality within the association: 10 mentions

(Note: There appears to be an emerging thread of opinion that not only does the Government not consult effectively with the industry, the Boards of some associations seem to be a closed shop that does not consult with its members.)

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I think the role of these industry association(s) or bodies should be to

- Be proactive - not reactive. We're always reacting after we've lost something.
- As long as there is not an overload of information from the associations.
- But as long as the information is not info overload.
- Particularly lobbying.
- To work together with each of the other sectors and associations as required.
- Training and marketing are difficult areas so say either yes or no – it's complicated and the association should proceed with caution.
- Relationships with processors to build up the marketing.
- Liaise with Government on all issues affecting the industry, but not on the local issues (that's up to the zones to do)
- Represent the majority view on issues affecting the industry.
- Protect the rights of the fishers to develop new ideas for selling and catching the fish.
- Take a firm role when dealing with Government.
- Secure fishing access to help keep us fishing and on the water; marketing is wishful thinking but it would be nice.
- Strong leadership for key issues: desalination; recreational fishing.
- Work along side the fishers; provide support for the fishers;
- Port: Bring up local issues to take through to the Sector association (SEPPFA) for actioning.
Sector: Provide a unified approach to the issues raised across the sector.
- Unity of the local industry toward the sector body and therefore being helping to get outcomes that benefit the industry generally.
- Liaison with fish processors - develop relationships and work together because processors can't function without fishers. Education - scholarships for the fishing industry with kids at school, to try and get more young people involved in the fishing industry. I see the lack of young people as one of the critical problems facing the industry: there are no young people coming through and learning the skills of fishing.
- Have a greater say in fisheries management and fisheries science - fishers are the ones on the water and have a vested interest in the sustainable harvest of the resource.
- Be a go-between for industry/government/management - critical because more and more government seems to be paying lip service to the industry and so getting a genuine relationship and negotiated outcomes is a critical role for the associations. All sector associations should be done in partnership with the State Association.
- Local level issues with local and state government agencies.
- Manage their own fishery!
- Training should primarily be for the younger fishers.
- Provide a voice for the fishers, make government listen to the industry.
- Provide information to the peak body so they have input into the issues and be a part of the negotiations.
- Provide opportunities of business development within the Commercial Dive fishery; negotiate with Government is critical.
- Associations should be taking a proactive approach to issues and matters of concern to the commercial fishing industry.

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- Prioritise issues; making things be transparent within the association; intelligence levels of the leadership group.
- Especially the marketing, fisheries management and science and gather and distribute information.
- Particularly industry development and marketing including the development of new markets (even though it is not really done at this point in time).
- Some of these roles should come from the DPI management rather than from the industry.
- This is in an ideal world only.
- All these things should only be done after liaison with industry. Get a better deal for the industry.
- Food safety etc
- This fisher is a night fisher - there was a lot of reluctance to answer the question as he was bogged down in other issues.
- Supporting and taking the spokesperson role for the industry.
- Look after members.
- Especially the negotiate with government and gather and distribute information and supporting/ providing "networks" and representation.
- Helping with all areas of the fishing business.
- Representation with Local Government level - for local issues: local flood mitigation etc.
- Especially the fisheries management advice because there is and continues to be a syndrome of "shifting goal posts".
- The National Industry body newsletter?? They send it out but it provides nothing relevant to me or indeed SA, it seems to be Old, NSW and NT orientated.
- Promotion to me represents seafood as a whole not sector specific.
- Should unify the industry.
- Marketing product - particularly exporting. Environmental issues - IMPS for e.g.
- Sharing experience through mentoring type activities e.g. assistance with marketing and dealing with the factories etc.
- They should particularly negotiate with government and provide a unified group position/ representation. The association should also enforce the voluntary codes of practice once they've developed them with the fishers.
- Very much about negotiating with the government.

Forty seven free-response comments. Main themes are:

- Providing a unified voice for fishers: 18 mentions.
- Negotiate with government: 11 mentions.
- Marketing: 6 mentions.
- Providing information back to fishers: 5 mentions
- Education/training/mentoring of fishers: 5 mentions

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The role of fishers in the association should be

- Represent fisher members.
- Catch fish - leave the politics out of it.
- Get concessions from government.
- Provide information and feedback to the associations; be united; be actively engaged.
- Go fishing and let the association deal with the rest.
- Local level - Talk among themselves and direct the fishery. Sector level - look after the fishery. State level - pay membership. National - support the marketing and strategies.
- Be actively involved and support those that support us and our business.
- Be good business people and support the people that support us.
- Only some people should be sitting on the committees - the younger people, with good ideas and a positive outlook on the industry; go fishing; being united - sing from the same hymn book; look after the fishery.
- Be unified and get behind the association; be actively involved.
- Put their views forward.
- Pay membership and be united.
- Pay membership; participate in the association; marketing the product and advancing the markets.
- Vote on all issues at the committee level.
- Pay membership; being a part of promotional activities; provide product.
- Fishing.
- Be unified.
- Pay membership; voice opinions and be involved.
- Go to meetings and participate in the association.
- Be involved; have your say; pay membership.
- Unification - stick together for the benefit of pricing and management. Agreement between processors and fishers.
- Provide financial support to their respective sector associations and state industry bodies from annual membership fees.
- "Get off their arse". It's mostly all take and no give with fishers. Be more cooperative with each other as an industry.
- Go to the meetings, be unified and pay membership.
- Pay membership; don't represent blokes that don't pay the membership.
- Attending meetings and sharing information; being unified.
- In directing the work of the association, the fishers should only be involved at the strategic direction; not at the day to day level. In assisting staff to deliver outcomes to the industry - this I believe is a yes/no. Sometimes too many person agendas get in the way of getting the work done. Fishers must be responsible for rallying the fishers together. Unify.
- Be united.
- Support and attendance.
- Attend meetings; give more support - time, sit on committees etc, to deliver outcomes to the industry.
- Fishers need to take on all the roles required to manage fisheries stocks.

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- Unified of the industry - investors don't come to meetings, overcoming the large geographical distances.
- Honesty; don't burden the association with personal problems; be unified.
- Participate in the association.
- Getting behind the association and support the work/people at the helm; compulsory deckhand assistance. There are a lot of part-time fishers in the commercial dive fishery, so there needs to be compulsory membership.
- Fishers are responsible for catching a high quality product daily which is ready for the export market. They are also responsible for the accurate reporting in logbooks - i.e fishers should be catching a high quality export product and maintaining the catch records accurately. Fisher roles within associations should go to the fishers that 1. want to do the job and 2. have the specific skills to do the job - I am very reluctant to specify that any fisher "should be involved" rather it should be "if they want to do the job". These fishers should be caring, professional people that consider the bigger picture. They should be able to present to the media, government, politicians and represent the industry views professionally. But I also strongly believe that these roles should be filled with fishing - working fishers on the ground.
- Express views with a unified voice; strong membership; provide strong leadership; not get stuck on pet issues - be strategic.
- If one doesn't represent the fishers then GOD help the Industry.
- Catch the product, but there is also a role beyond catching the fish.
- Input into the direction of the industry; listening to each other; fishers sitting on committees; paid staff should be a support to the fishers rather than the other way around!
- In assisting staff, it should be a more supportive role.
- Be unified; produce a premium product (high quality strong and well looked after); chase the premium products; maximise the return on the product; research into new markets.
- Membership should be 100%; make outcomes happen; control the group and move in a direction that you want to go.
- Go to meetings.
- Unity - big time. Fishers should express themselves provide some vision/direction for the sector. Remove the personal agendas and refocus the group on the issues affecting the broader industry. Be actively involved in solving the issues facing the industry.
- Communicate between fishers. Turn up to meetings.
- I don't know.

Forty seven free responses were given by respondents. Main themes seem to be:

- Be an active participant and supporter of the industry: 26 mentions
- Be united: 13 mentions.
- Pay membership: 9 mentions, with compulsory membership mentioned 3 times.

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I think that these industry association(s) or bodies could improve the following things

- Refrain from having the boys up the front pushing their own barrow to the detriment of the majority. - Jeff Wait!
- More younger members going on committees and boards.
- Communication to members.
- Not waste money - there seems to be a lot of money wasted.
- Simplify information.
- Marketing OS. Advertising the product more.
- Important issues face to face contact. All have a say. Importantly why do they think this way – what's their motive?
- Better political lobbying - "get some balls".
- I believe they do the best they can.
- Negotiating with government agencies.
- Be united as one.
- Promotion of the industry.
- Not open enough; running costs expensive; should listen to fishers more.
- In replying to this survey, I would like to point out the reason I am not a member of your association or of any other associations is that, you all probably do a good job, but I can not join them all for the obvious cost. I'm sure others feel the same as me and until you can unite in one unit my involvement will remain the same.
- Marketing seafood from SA to the Australian consumer and abroad. Sector DVD's to promote their fishery and all SA seafood and value chain "show the consumer where it comes from".
- Membership should be compulsory.
- 1. Through positive outcomes to serious issues. e.g. Coastal Development, licence security, introducing new policies e.g zones/quota, overhaul of amalgamation scheme (2:1 Licence transfers - abolish the points system which is outdated and would reduce fisher numbers more expediently), reduce amateur bag limits on more important species (e.g. squid, garfish). They have the statistics and I have been paying (fees) for over 25 years. Do something! 2. Lobby for introduction of amateur fishing licence, they want it, let them contribute to compliance, research etc. Don't listen to Rann. He'll be gone at the next election. 3. The main reason fishers do not join associations is they see no point and consider it a waste of money. 4. I have been a marine scalefish fisherman for over 25 years. We used to have port meetings. Fishers could meet each other and discuss and vote on issues. We used to get "Southern Fisheries Magazine" and SAFIC fees were a part of the overall fees. Things have decayed over the years. Get fishers involved through incentives, not increasing what is in my exorbitant fees for service that do not directly contribute to my fishery e.g. compliance "where are they?"
- Look to changing our association with SARDI to another scientific body that can accurately and honestly analyse data without self interest and data misrepresentation.
- Greater communication about the work being done at a state and national level.
- They could get some better outcomes to keep us fishing!
- Stronger communication with the industry about the work being done in the association.

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- Keep telling us what you are doing and don't be afraid to call and have a chat - develop a face with the industry.
- Net fishery: pay for the executive officer role and better governance of the organisation.
- Agreement between the fishers.
- Don't get involved in the local issues - stick to the bigger picture.
- MPAs - Stronger stance on the MPA development with Government and greater communication to the industry regarding MPAs.
- Firmer stance with Government – PIRSA.
- Promotional activities; funding security.
- Tougher stance on the desalination; take a more leading role on issues facing the industry.
- Greater communication; more on the ground meetings in the regional areas (although needs to be a balance between costs and activity on the ground).
- Lobbying for better equality between commercial and recreational fishers; Marine park lobbying.
- I think that membership of WFSA should be paid direct from each association so that each licence holder is a member of WFSA.
- Reverting to an FMC style committee with direct access to the director of fisheries and ministers rather than the current distance put between PIRSA and the fishers; who at the end of the day pay ALL the wages and bills.
- Pointless extending services any further until there is a broad seafood levy attached to everyone's licence so services could be improved/re-shaped/timely and extended. None of these are exclusive. At all levels of industry there are too few doing too much for very little! (\$\$\$).
- Be more open and honest with what they are doing and not go on with their own personal views. And consult more honestly by not only telling fishermen what they believe will make them look good.
- Unifying the industry.
- More numbers at meetings and membership and unification. More say in what goes on with the fishery (management, science etc).
- MFA - communication levels, reasons for then being present: what does the association do and why is it there? Delineation of roles between the different associations - there is a lot of confusion within the industry.
- Encourage young people and get the right conditions in the industry for young people to invest and work in the industry.
- More political clout and negotiation powers - need to stop being overruled all the time. People aren't paying because "what's the point?" There has been a continual erosion of the fishing industry through politics and the fishers see no point in trying to establish a long term future in the industry. Many are talking about getting in and making the cash before they are forcibly removed.
- Additional membership and other financial support would improve services at a State-wide level. Our sector association is too small to provide adequate support to local fishers at the level required. We need to look at creative ways to pay for a support officer.

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- Negotiation with government as previously described. The "consultation process" with government. Governance of the associations. Education of fishers regarding scientific processes.
- Attendance at meetings. Deal with the reasons for declining membership which are: the greed of the Australian people - including fishers. Less fishers generally because of management, especially less young ones, which is reducing the number of people available to join the associations, and of this small number of fishers, there are even less joining the associations; same as for the unions which I believe is just a growing "what's in it for me?" factor. People don't want to "look after their mates". Time: fishers are fishing, if they give up fishing time then they'll lose money. It needs to be more broadly recognised that it actually costs fishers to attend meetings.
- Lack of confidence in the system. But consistent mismanagement has eroded the membership base and this is directly related to the continual changing of management staff through the Department.
- Government Agencies - take personalities out of the negotiations. They should be looking at the issues, not at the person representing the industry. They should not be "shooting the messenger". The Association - be united as a single voice so that government has more requirement to take notice of the industry position.
- Communication with Government agencies/ departments.
- The national body has nothing to do with the WA State fishing industry - there needs to be a greater level of relevance.
- More assistance and "push" for the TCDA from TSIC, more support with government negotiations. There is unfair treatment from government between differing fishing sectors. Industry needs to get behind itself to get changes happening and there needs to be more fishing activities. The associations needs to address the reasons why the membership has dropped; some fishers are tired of travelling to meetings, perhaps there needs to be more meeting conducted with phone hook ups, at any rate the associations needs to find more workable solutions.
- Marketing - but there are a lot of issues surrounding the issue of marketing.
- Miscellaneous group members and sub sectors too diverse / dissimilar in fishery or operational scope - this fact probably compounds the lack of member support / involvement.
- Provide a unified front - stop the in fighting; manage the association better.
- Tas Abalone Council - governance arrangements within the organisation.
- All marine scale fishing licences to be endorsed with the same endorsements and pay the same licence fee. ONE association to represent all fishers within each state and have sub committees. This way there would only be ONE membership fee per annum. Lobby Government and have the ruling for POSSESSION limits reintroduced. Then and only then will we see amore sustainable fishing industry. The amateurs are killing the stocks. More research into the effects of catch and release on stocks.
- 1. Facilitate more swapping of info. Etc. 2. Better relationships with Govt Depts.
- More information - but probably related to people going in directly.

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- Additional people to assist John do his job - I'd be willing to pay more if we were seeing tangible results and outcomes; government lobbying - regarding recreational access and costs of research and environmental issues.
- Marketing to develop the bottom line of the seafood businesses.
- Marketing, honest, integrity, communication (good and bad news); Governance of the Co-op: Board - 2 Independents, 4 fishers, 1 wife; issues with the management of the co-op.
- The co-op has "issues": money, management of the business and marketing the product.
- Sales and marketing, increased prices for product and expand current markets.
- Marketing - the co-op needs to develop this more strongly. John's rep role is excellent and am very happy with it.
- More communication to members.
- "Men's Shed" is excellent - should keep going indefinitely.
- Co-op manager and management arrangements for the co-op. Price of the prawns - overheads too high.
- Marketing product, advice networks and support.
- Export market development.
- Strategic planning: at least two meetings per year for industry to workshop direction and set the new direction. Industry unity with gear types and fisheries.
- Softer ice.
- Communication at a State industry level.
- Marketing and management of the co-op.
- Happy with the Service provided by John. Not happy with the services provided by the co-op - they need to improve on marketing and quality.
- Better level of consultation at the local level.
- Government department communications.
- Membership fees are too high (handling fee) but this is related to survival.
- Be more open in decision making process. At state and federal level, there is far too much political influence.
- Keep producing information to all licence holders on all aspects of fisheries, so as to get more licence holders to become members of associations and above all, make sure that persons elected to the committees are not there for their own benefit as has happened numerous times in the past.
- Due to the diversity of the MSF and the sector in which I fall, any fee for associations which I feel could represent my fishing activity should be left to the individual. However having said this, my return for the services from these associations would not be economical earning less than \$30,000 per year with licence fees and running costs just kills the individual line fisher.
- I am only partially happy with the services provided by the association. Associations should keep out of marketing and concentrate fully on lobbying and representing industry on matters with government. Under this new system (ie no FMC's) we have gone back 20 years. Government is screwing us out of existence. We have no effective representation.
- As happy as I am, I only wish that fishers could appreciate it. Maybe help with marketing our product.

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- Get more members - need more money to change things. The Charter Boat Association can't attract members and is struggling with funds.
- Maybe get a State body to fund various sectors and have a "fee for all". Probably wouldn't work. The MFA is seen as the "poor cousins" of other fisheries.
- As a non licence holder (I am the son of a SZ rock lobster licence holder and the skipper of the vessel), I am very sympathetic to Wildcatch as the states 'peak' body and applaud you all for merging the two 'shit-fights' we had before (SAFIC & Seafood Council). My father chooses not to pay Wildcatch but pays SARMAC, as our interests lay primarily (naturally) with rock lobster industry. My choice would be to pay both as there are issues that Wildcatch encapsulates that SARMAC do not. Keep up the good work. My best wishes to all at Wildcatch, my hopes are that your current membership (and funds) problems are rectified and all licence holders state wide 'come back to the table' - so to speak and support all fishing organisations. Merry Christmas.
- I think we are getting there, but a representation at National level would be good and a seafood levy is imperative.
- By removing people who think it's their world and that there's no one else to do the job. They think of them self as God. Putting people on Boards from one sector, then moving themselves to another to be big-wigs themselves runs throughout all currant associations at the moment.
- Marketing.
- Liaise with government.
- Build/ develop the capacity of the fishers to delegate roles and responsibilities and facilitation of different groups and issues.
- Social events for fishers and their families - keeping it social helps to keep everyone involved and interested. People also get to know one another on a social level rather than always about fishing.
- How to deal with Government so that it follows the right facts to make the right laws. At the moment, it has been making changes to win votes and it is costing the Fishery dearly.
- Marketing product.
- Our public profile. Government support for scale fishers needs to be on a par with that enjoyed by the abalone, cray and prawn industries. PIRSA should listen to fishers when contemplating actions to protect fish stocks, because stats are largely out of date when finally collated. We are being saddled with poor decisions that do not reflect the current status of fish stocks.
- TCDA - early days at this point in time, time will tell TSIC - not happy with the level of services provided for the level of financial commitment from fishers, related to the compulsory nature of the payment - it should be a choice for fishers to make for themselves. Not sure that TSIC provides adequate services to the fishers in less valued fisheries.
- Membership - commitment from licence holders, greater numbers at the meetings (only 4-5 turned up for the AGM).
- TCDA - there needs to be stronger marketing focus from the Association. TSIC - I am not sure what they do and where the money is going, particularly as it is compulsory.

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- Assist fishers rally to push for effective change not change for change sake. NSW Fisheries have their own agenda and continually hoodwink fishers into giving away parts of their business without compensation.

Ninety five responses received, considerably more than the number of free-responses provided to any other question. Further, the length of the responses, were, on average, greater than those provided for other questions. These two factors suggest that respondents had a lot of energy for this question and that it is tapping into issues that are important for them. Most frequently mentioned themes are:

- Need to improve the industry's relationship/lobbying with various levels of Government and Government agencies: 23 mentions.
- Marketing and promotion: 16 mentions, including 1 who said associations should not be involved in marketing. Others held the opposite view.
- Need for improved communication with members and fishers: 12 mentions.
- Issues about governance of associations/Boards/management: 11 mentions.
- Confusion over the complexity and costs of multiple associations: 9 mentions.
- Compulsory fee/levy: 6 mention, including 1 who argued against it.
- The need for industry unity: 5 mentioned.
- Support for younger members: 3 mentions.
- Stricter controls over amateur fishers: 2 mentions.

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I am happy with the industry association or body communication. If no, please tell us how you want the association to communicate with you?

- Associations continue to face the same problems - lack of communication and few individuals do most of the work and there is little thanks for the work that is done. This was the situation when I was heavily involved as president of the association approximately 6 years ago.
- Since the licence buyback, associations seem to be communicating more effectively and more frequently - Better albeit.
- Our port association is in a shambles and there is no help to me - one meeting a year is bullshit.
- Phone, literature.
- Not sure about the state org; it's not been around long enough.
- Quite reasonable.
- I don't see achievement by the association or management of fisheries.
- Not sure.
- More information could be passed on from the State industry body.
- Newsletters - applications to all licence holders.
- Monthly.
- Basically, "toothless tigers" all talk and no action or political pull. Go ask the River Fishers how good the associations are. Be more proactive with positive outcomes and they (the association) will get more membership.
- A little more frequently would be good.
- It should be more frequent.
- They don't seem to care about the small operators which work in isolated areas.
- Just more on specific issues such as MPAs.
- Greater communication - but keep it simple.
- Greater frequency of communication.
- Maybe more frequent communication.
- I would like the new committee to communicate their minutes to the stakeholders they are supposed to represent. in this case all NZ licence holders. More consultation directly from the decision makers to the grass roots preferably prior to decisions being made.
- More communication would be better, it needs to be more frequently.
- As a member who has been on the management committee, I find that there is now not a great deal of communication from the CEO level and committee level to its members on a very regular basis. This may sometimes give a feeling that the amount of membership fees paid is not worth it. In other words what are we paying for ??
- There could be a little more communication from the associations.
- Could have been better, but it is difficult with the time and resources available to the association.
- Minutes should be provided after each meeting more quickly.
- In NSW there are political issues and in-fighting that stops the flow of communication.
- I want the communication to be delivered promptly and straight away NOT months later when it's too late to do anything about it.

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- But more info on some issues.
- More information through the pays.
- More detailed information is required.
- Happy with the association.
- More often on pressing issues, site specific meetings at times would be good. Email is fine.
- State and National industry bodies take their advice from sector and port reps who mainly represent their own matters of interest, not as industry as a whole. Decisions are based on financial value not on industry best interest. Until it's too late.
- Should be more activities being done, but there are very few people that want to do the hands on work.
- Depends on the outcomes, actions etc of the communication.

Thirty five free-response comments. Most frequent themes are:

- Need for better quality and more frequent communication: 14 mentions.
- Dissatisfaction about the governance of associations: 7 mentions

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My preference for paying for the industry association is...

- Through voluntary contribution.
- It is sad that most people don't pay directly.
- Pay for no more than one representative body.
- Unsure.
- The only way to run a state body is through compulsory fees collected through licence fees.
- Through my licence so that everyone pays evenly.
- Incorporate necessary fee within the annual fisheries licence fee, not additional too. Fees need an overhaul: we are paying for services which they are not accountable for.
- It would be great to have compulsory membership. However I am reluctant to say it should be through the licence fee or through a levy.
- But we need to have a greater number of fishers paying - so many fishers have a "chip on their shoulders" and they (other fishers) complain that "someone is not doing anything for them".
- The present and past cost of running the association is far too high SZRL and needs to be fine tuned. We do not need SARLAC; SEPFA should be able to look after the Southern Zone with Wildcatch fisheries doing the things for all. No SARLAC or Southern Rock Lobster which is running out of control.
- Difficult because it's collected by government, which only leaves the direct payment.
- Definitely with option for instalments: this is critical as there are many other business and daily living expenses that we have, so its great to be able to pay the membership in instalments.
- Lump sum payment to a single association that would then be equally divided up between each of the other associations.
- Compulsory membership ideally.
- Being present and having a licence means you get people that are interested in the association which is vital. If you get the right people, that's better than a bunch of people that are forced to be there.
- As is currently (Through WAFIC into a managed account).
- Compulsory payment.
- Membership should be compulsory.
- Compulsory subscription.
- But voluntary.
- Voluntary if I wish to join and definitely not being told to join.
- Collection through licence fees should be mandatory, but the licence holders should direct how the money is spent or it could end up as de-facto income for non relevant bodies.
- Happy with current method.
- Happy with the weekly levy.
 - Happy with the auto deduction
 - Happy with current method
 - Continue with the same method it works well
 - Happy, no change required.
 - Happy with the current method
 - Happy with the current situation

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- Happy with the system the way it is
- Happy with the current situation - through the co-op pays: don't have to think about anything
- Yes, happy with the current method
- Happy for the payment to be deducted
- Ok through the pays
- As is.
- Happy with the way it is
- Happy with the way it is
- Happy with the way it is
- All good
- Happy with the current situation
- Excellent the way it is
- Pretty happy with the current system
- Happy with current situation
- Happy with current situation
- Raise the levy, happy with the automatic deduction system through the co-op pays great the way it is.
- Happy with the way it is. I don't really want to pay at all, but I still use the services and get the benefit.
- As is currently is - proportion of the product brought through the co-op.
- Per kg rate for the membership fee - those that catch more would pay more.
- At present all fees come back to industry, and most of the fees are quite high, calculated carefully on outgoings. All bulldust, should be funded to some extent through general revenue (state or federal) and implement a state fishing licence for recreational fishing. This could put considerable funds to research and development, but unfortunately not politically acceptable.
- I strongly believe that we should all be paying our fee's, so a collection through the licence fees is the best way. Its a pity PIRSA doesn't think so.
- No accountability to government departments. Not doing a good enough job to give them anything. Arseholes should be paid on productivity only.
- either/or
- either of these options
- Because every one will have to join means that there would be more funds
- We need to pay one fee only e. g. to SAFIC ,either directly, or through licence fee. Prefer that fee is incorporated in the licence then everyone who is receiving a benefit is forced to contribute. Too many free loaders in the MSF and after several years this has become to wear a bit thin! I strongly advocate one fee only to peak body that in turn, makes a grant to each association.
- I have ticked two because if the licence fee option can not be achieved then a levy system seems the next logical process
- Should NOT be compulsory - everyone should be able to choose for their own business whether or not they join the association.
- Collected by TSIC for the association
- Would like to see the membership through the licence fees for both sector and State associations (this already happens for the State and it works well)
- If you're happy with the association you'll pay the membership irrespective of the way you pay it
- Definitely not compulsory, the management needs to be changed such that you can go fishing irrespective of your membership of TSIC
- Possibly through the licence fee (like as is done for TSIC) or collected by the State association

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(TSIC) and distributed to the sector association.

- But they should not be compulsory payments

Sixty four free responses; the second highest number of responses. Main themes were:

- Leave things as they are: 27 mentions
- Compulsory levy: 14 mentions
- Pay to a single body: 8 mentions
- Voluntary levy: 6 mentions

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