



Industry views on the Queensland fisheries reform process and Vessel Management Systems

Preliminary Survey Results 3 December 2018

Part 1. Introduction

The Queensland Government has spent considerable time and public funding developing an industry reform agenda. The Queensland Seafood Industry Association (QSIA) administered an initial survey in early 2018 seeking the views of industry regarding the reform process. This survey represents a follow-up and was undertaken as a response to increasing stress amongst the Queensland commercial fishing industry.

Part 2. Summary of Survey Findings

Views regarding Queensland Fisheries Reform

- 94 percent of respondents indicated the reform process was rushed.
- 93 percent of respondents indicated that they wanted more time to consider the impact of the reform on them and their businesses.
- 96 percent of respondents indicated they had concerns with how Fisheries Queensland engages with industry.
- 80 percent of respondents indicated that they had considered leaving industry as a result of the reform process.

Views regarding Vessel Monitoring Systems

- 92 percent of respondents indicated concerns with the security of their information upon implementation of VMS across industry
- 92 percent of respondents indicated concerns with the number of agencies that may have access to VMS data.
- 94 percent of respondents indicated concern with the potential financial impacts of VMS on their business.
- 75 percent of respondents have considered exiting industry based on the introduction of VMS.
- 77 percent of respondents indicated that government would compromise their intellectual property by allowing access to their VMS data.
- 91 one percent of respondents stated that Fisheries Queensland had not adequately consulted with the commercial seafood industry regarding VMS.

Part 3. Background

Queensland seafood industry participants were invited members and non-members to provide their views on the reform process. The responses reflect a point in time view from industry regarding the reform process has impacted commercial fishers and post-harvest businesses. Industry views are critical to understanding that the reform process has the capacity to both build and undermine the viability of commercial fishing businesses.

The Association received 104 responses completed between 25 October and 2 December 2018.

Part 4. Survey Demographics

The majority of respondents work in the wild harvest fisheries (n = 91)¹ followed by post-harvest businesses (n = 12). One respondent did not advise the fishery in which their business operate.

Table 1. In which part of industry do you work?

	No of Respondents	% Respondents
Wild Harvest		
Crab	7	8
Net	8	9
Line	18	20
Trawl	13	14
Multiple Fisheries*	25	27
Wild Harvest Fishery Not Identified**	20	22
Total	91	
Post-Harvest		
Retailer	6	50
Wholesaler	5	42
Processor	1	8
Total	12	
Restaurants	-	-
No response	1	-

Notes: * Respondents indicated work in multiple fisheries. ** Respondent works in a Queensland fishery but did not specify a fishery. All post-harvest respondents indicated they held business interests in the wild harvest sector.

There were multiple combinations of licence ownership and post-harvest (n = 104) including:

- License Owner (LO) – n = 56
- Leasee – n = 22
- Combination of LO's / Leasee's – n = 5
- Combination of LO's / Leasee's and Post-Harvest – n = 12
- No response – n = 9

The average number of years worked in the seafood industry was approximately 25 years. The range of years worked in the seafood industry was 2 to 55 years.

¹ n = number of survey respondents.

Table 2. Years working in the Queensland seafood industry

Number of years worked in the Queensland seafood industry					
0-10	11-20	21-30	31-40	41-50	51-60
n = 12 (12%)	n = 34 (33%)	n = 24 (23%)	n = 21 (21%)	n = 10 (9%)	n = 1 (1%)

Notes: n = 102.

Nine regions were nominated in the survey and respondents were asked to identify where they worked. The regions in which respondents worked are noted below.

- NSW Border to Donnybrook – n = 25
- Donnybrook to Gympie – n = 31
- Gympie to Baffle Creek – n = 36
- Baffle Creek to Claireview – n = 40
- Claireview to Gumlu – n = 18
- Gumlu to Clump Point – n = 20
- Clump Point to Wonga Beach – n = 21
- Wonga Beach to and including Torres Strait – n = 20
- Gulf of Carpentaria – n = 11

Part 5. Survey Responses

5.1. Queensland Fisheries Reform

Questions 1 to 4 reflect those put to industry in the initial survey in March 2018. An additional question was added relating to industry operator's intention to stay in the Queensland seafood industry.

Question 1.

Are you concerned with the speed at which Fisheries Queensland is undertaking the reform process? *Response: Yes, No*

In terms of concerns regarding the speed of the reform process, 103 responses were received with 94 percent of respondents (n = 97) indicated the process was rushed. Six percent were not concerned with the speed of the reform process (n = 6).

Table 3. Concerns with the speed of the reform process

March 2018		December 2018	
Yes n = 84 (84%)	No n = 16 (16%)	Yes n = 97 (94%)	No n = 6 (6%)

Notes: March 2018 (n = 100) and December 2018 (n = 103).

Question 2.

Do you want the process slowed down to give you more time to consider the impacts on you and your business? *Response: Yes, No*

One-hundred and two responses were received and in terms of slowing down the process, 93 percent of respondents (n = 96) indicated that they wanted more time to consider the impact of the reform on them and their businesses. Seven percent did not want more time to consider the impacts on their business (n = 7).

Table 4. Changing the speed of the reform process

March 2018		December 2018	
Yes n = 80 (80%)	No n = 20 (20%)	Yes n = 96 (93%)	No n = 7 (7%)

Notes: March 2018 (n = 100) and December 2018 (n = 103).

Question 3.

Do you have concerns regarding how Fisheries Queensland are engaging with the commercial fishing industry? *Response: Yes, No*

With respect to engagement between Fisheries Queensland and industry 96 percent of respondents indicated they had concerns (n = 100). Four percent of respondents did not have concerns with the engagement process (n = 4).

Table 5. Industry concerns with the engagement process

March 2018		December 2018	
Yes n = 85 (85%)	No n = 15 (15%)	Yes n = 100 (96%)	No n = 4 (4%)

Notes: March 2018 (n = 100) and December 2018 (n = 104).

Question 4.

Have you considered exiting the Queensland seafood industry as a result of the current fisheries reform process? *Response: Yes, No*

This question was not featured in the original survey (n = 104). Eighty percent of respondents indicated that they had considered leaving industry as a result of the reform process (n = 83). Twenty percent had not considered leaving the industry (n = 21).

Industry Views

Please detail any issues you have as a result of the reform process.

- Increasing costs to industry as a result of the reform process was the dominant theme noted by respondents.
- Loss of faith in Fisheries Queensland.
- Poor consultation was a theme identified by respondents.
- Reduction of licence value, lack of confidence in the reform process and mental health and stress impacts on business owners and their families.

Some quotes from commercial fishers highlight the issues already raised by the Association:

Quote 1.

'Have no real faith in fish managers. They don't seem concerned over fish stocks or the real problems off rec fishing and coastal development. Am very angry at this whole process and have suffered mental anguish over this.

Quote 2.

'No consultation, no research, no consideration, no negotiation Fisheries in no way followed any reform process whatsoever they have not met their obligations to manage guidelines, this was the most unprofessional highly bias process I have ever seen'.

Quote 3.

'Fisheries Queensland have already decided what reforms are going to be introduced. Engagement with commercial fishers is only a formality to make people think they have a say and that their input is important. For some reason, our governments do not want Australian to have access to fresh local seafood'.

5.2. Vessel Monitoring Systems

The questions regarding VMS are a new inclusion to the survey given the industry backlash regarding the costs, intellectual property concerns and rush to implement the policy.

Question 5.

Are you concerned about the security of your information should VMS be implemented?

Response: Yes, No

Overall, 92 percent of respondents indicated concerns with the security of their information upon implementation of VMS across industry (n = 95). Eight percent were not concerned with the security of their information (n = 8).

Question 6.

Do you have concerns regarding the number of agencies that could have access to your VMS data? *Response: Yes, No*

Ninety-two percent of respondents indicated concerns with the number of agencies that may have access to VMS data (n = 95). Eight percent of respondents were not concerned with agency access to VMS data (n = 8).

Question 7.

Are you concerned about the potential financial impact of VMS on your business? *Response: Yes, No*

Ninety-four percent of respondents indicated concern with the potential financial impacts of VMS on their business (n = 97). Six percent of respondents did not have concerns regarding the potential financial impact on industry (n = 6).

Question 8.

Have you considered exiting the Queensland seafood industry based on the introduction of VMS? *Response: Yes, No*

Seventy-five percent of respondents have considered exiting industry based on the introduction of VMS (n = 77). Twenty-five percent of respondents stated that they would not exit industry as a result of the introduction of VMS (n = 26).

Question 9.

To what extent do you agree with the following statement: 'The Queensland Government will not compromise my intellectual property?' *Response: Strongly Agree, Agree, Unsure, Disagree and Strongly Disagree*

Seventy-seven percent of respondents indicated they disagreed with the statement (n = 80). Thirteen percent agreed with the statement (n = 13). Ten percent of respondents were unsure (n = 10).

Table 6. Intellectual Property

Strongly Agree	Agree	Unsure	Disagree	Strongly Disagree
n = 9 (8%)	n = 4 (5%)	n = 10 (10%)	n = 15 (14%)	n = 65 (63%)

Notes: n = 103.

Question 10.

To what extent do you agree with the following statement: 'Fisheries Queensland have adequately consulted with the commercial seafood industry regarding VMS'. *Response: Strongly Agree, Agree, Unsure, Disagree and Strongly Disagree*

Ninety-one percent of respondents indicated they disagreed with the statement (n = 94). Four percent agreed with the statement (n = 4). Five percent of respondents were unsure (n = 5).

Table 7. Consultation regarding VMS

Strongly Agree	Agree	Unsure	Disagree	Strongly Disagree
n = 1 (1%)	n = 3 (3%)	n = 5 (5%)	n = 13 (13%)	n = 81 (78%)

Notes: n = 103.

Industry Views

Respondents were asked to provide views regarding VMS.

- Increasing stress amongst commercial fishers.
- Loss of trust between industry and Fisheries Queensland.
- Costs regarding the introduction and ongoing use of VMS.
- Consultation process:
 - No broad-based discussion with industry regarding the pros and cons of VMS.
 - The development of VMS supplier list was undertaken without industry consultation.
- Industry perception of being forced to choose between a small number of VMS suppliers.
- Industry perception of being treated like criminals.
- Suppliers of VMS units:
 - Reliability of units is unknown.
 - Ongoing replacement costs of VMS units.
 - Wait times for replacement units.
 - Data security still an issue for commercial fishers.
 - Contract terms including an expectation that commercial fishers enter into 3-year contracts.
- Increased regulation costs in contrast to public position of the State Government to reduce 'red tape' burdens.

Additional quotes from commercial fishers regarding VMS:

Quote. 4.

'Lack of sleep worrying about my personal business information to the point I will be exiting the industry if we don't get some clarity on exactly who and for what reason should they be allowed to access my personal business information'.

Quote 5.

'My son has left school and is starting fishing with me next year (third generation) I feel the future of commercial fishing is very uncertain and would like to invest further down the track but am totally hampered by this restrictive current policy'.

Quote 6.

'I ask that the policies of the latest Fisheries Management Reforms including Vessel Monitoring Systems for commercial line fishing vessels be reviewed and rejected. As commercial fishers we are already heavily monitored and our reporting obligations are already very stringent and thorough. There is no guarantee that data collected from Vessel Monitoring Systems will not be made available to the wider community. I do not trust third party data collectors or the Department of Fisheries to keep my intellectual property confidential. I believe that the introduction of VMS will have a devastating impact on fisheries sustainability by potentially giving hundreds of thousands of recreational fisherman access to previously unknown fishing locations and environmental cycles'.

PRELIMINARY SURVEY RESULTS – 3 DECEMBER 2018