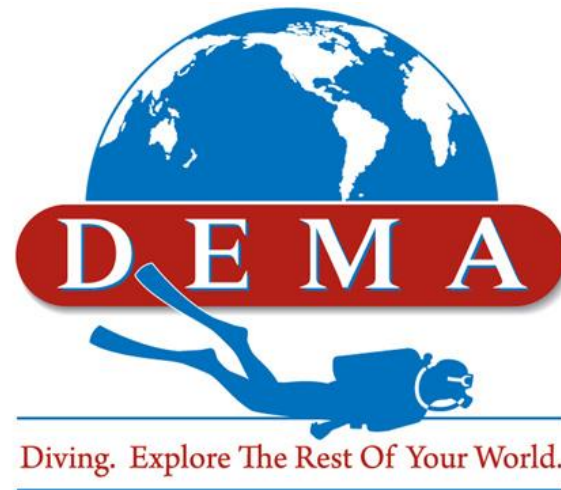


Goliath Grouper Moratorium Survey



August, 2017

Overview

More than 275 divers and diving professionals responded to this survey. Most were from the US with the majority of those US-based respondents from Florida, where a moratorium on harvesting the Goliath Grouper is currently in force.

The questionnaire requested information about the number of times divers and diving professionals went diving specifically to see the Goliath Grouper, as well as their opinion on removing the harvest moratorium or keeping the moratorium in place.

Special thanks to Dan Orr, Chair of the DEMA Public Policy Committee and to the members of the Committee:

Stuart Cove
Dallas Edmiston
Mike Hollis
Al Hornsby
Jeff Nadler
Carlos Santana
William Ziefle

Thanks to all DEMA Members for your continuing support of DEMA's Public Policy projects.

Tom Ingram
President and CEO

DEMA (The Diving Equipment & Marketing Association): GOLIATH GROUPER MORATORIUM SURVEY 2017

1. My business/primary residence is in (select one):

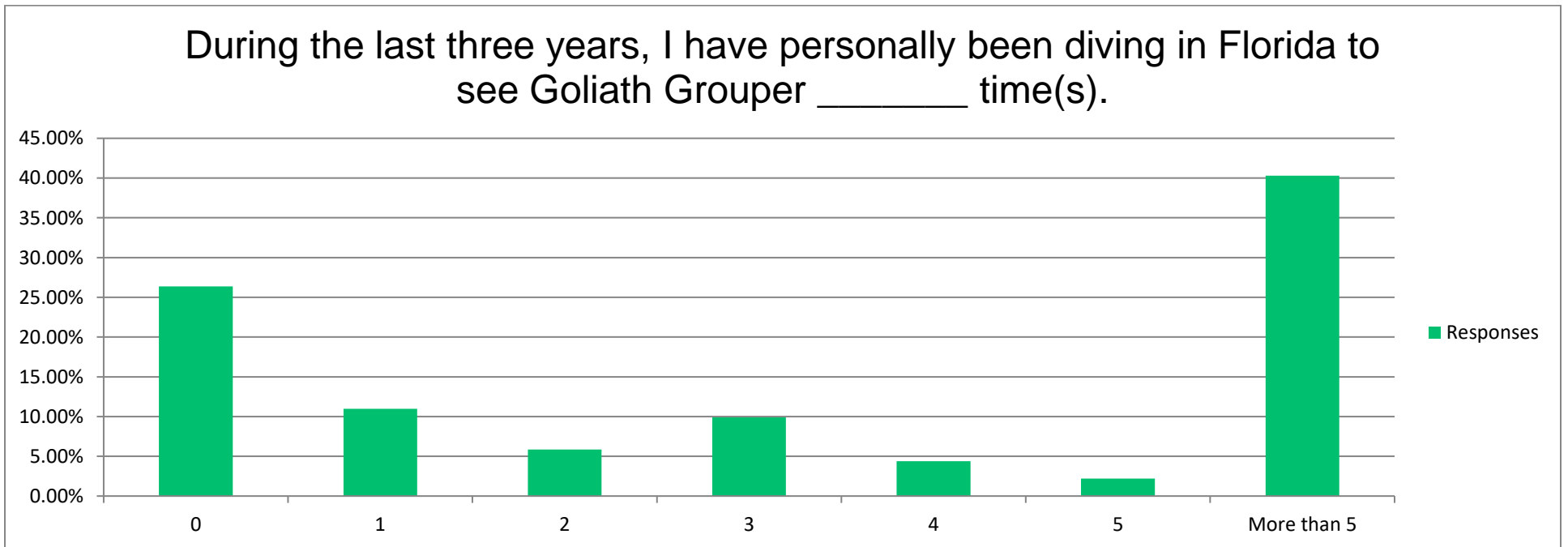
Most who responded to the survey were from Florida (63.2%), but about 40% were from out of state or outside of the US. This indicates that diving with Goliath Grouper is popular with divers from many different locations.

| Answer Choices | Responses | Answer Choices | Responses |
|-----------------------------------|-----------|-----------------|------------|
| Outside the US and US Territories | 3.6% | Massachusetts | 0.7% |
| Alabama | 0.4% | Minnesota | 0.4% |
| Alaska | 0.4% | Mississippi | 0.4% |
| Arizona | 0.7% | Missouri | 1.1% |
| Arkansas | 0.4% | New York | 2.9% |
| California | 3.6% | North Carolina | 1.1% |
| Colorado | 1.1% | Ohio | 1.0% |
| Connecticut | 0.4% | Oregon | 0.7% |
| Florida | 63.2% | Pennsylvania | 0.7% |
| Georgia | 2.5% | Puerto Rico | 0.4% |
| Hawaii | 0.7% | South Carolina | 0.7% |
| Illinois | 2.5% | Tennessee | 1.4% |
| Indiana | 1.1% | Texas | 4.3% |
| Kansas | 0.4% | Virginia | 0.7% |
| Maryland | 1.4% | Washington | 0.7% |
| Massachusetts | 0.7% | West Virginia | 0.4% |
| | | Answered | 277 |
| | | Skipped | 1 |

2. During the last three years, I have personally been diving in Florida to see Goliath Grouper _____ time(s).

The single largest answer from the respondents indicated that more than 40% had been diving in Florida to see the Goliath Grouper more than five times.

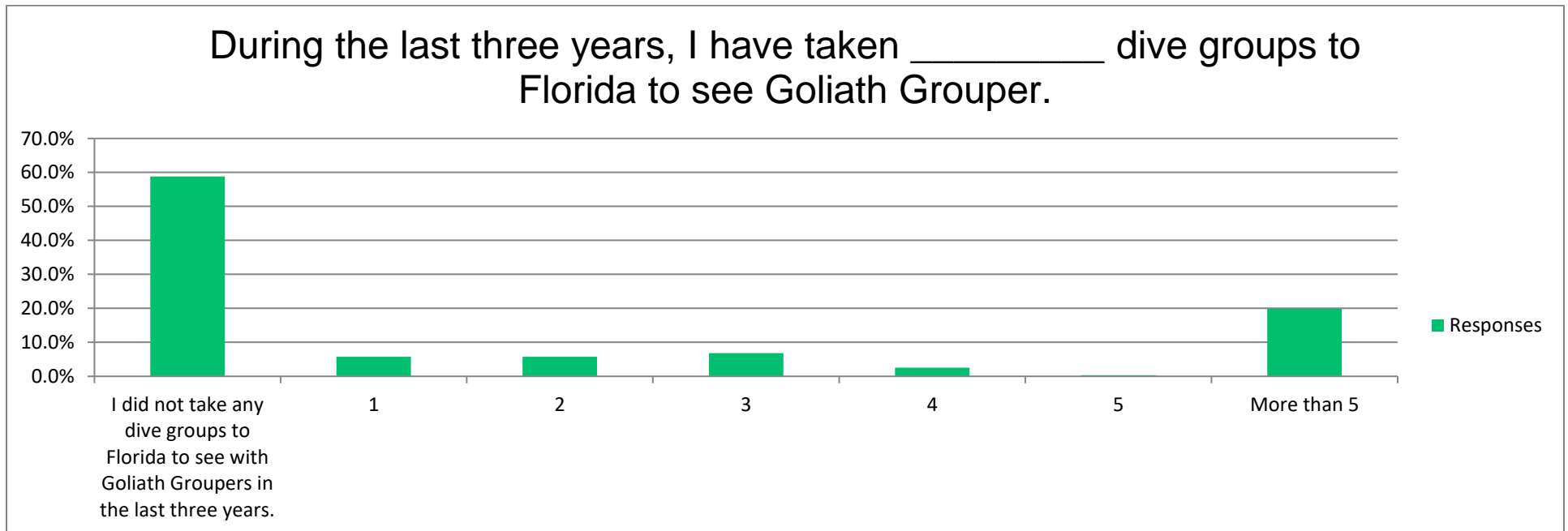
| Answer Choices | Responses |
|-----------------|------------|
| 0 | 26.4% |
| 1 | 11.0% |
| 2 | 5.9% |
| 3 | 9.9% |
| 4 | 4.4% |
| 5 | 2.2% |
| More than 5 | 40.3% |
| <i>Answered</i> | 273 |
| <i>Skipped</i> | 5 |



3. During the last three years, I have taken _____ dive groups to Florida to see Goliath Grouper.

Most respondents (58.8%) did NOT take diving groups to Florida to see Goliath Grouper. It is possible this is because most respondents are divers, rather than diving professionals. Almost 50% of the respondents who did take dive groups, took dive groups five or more times.

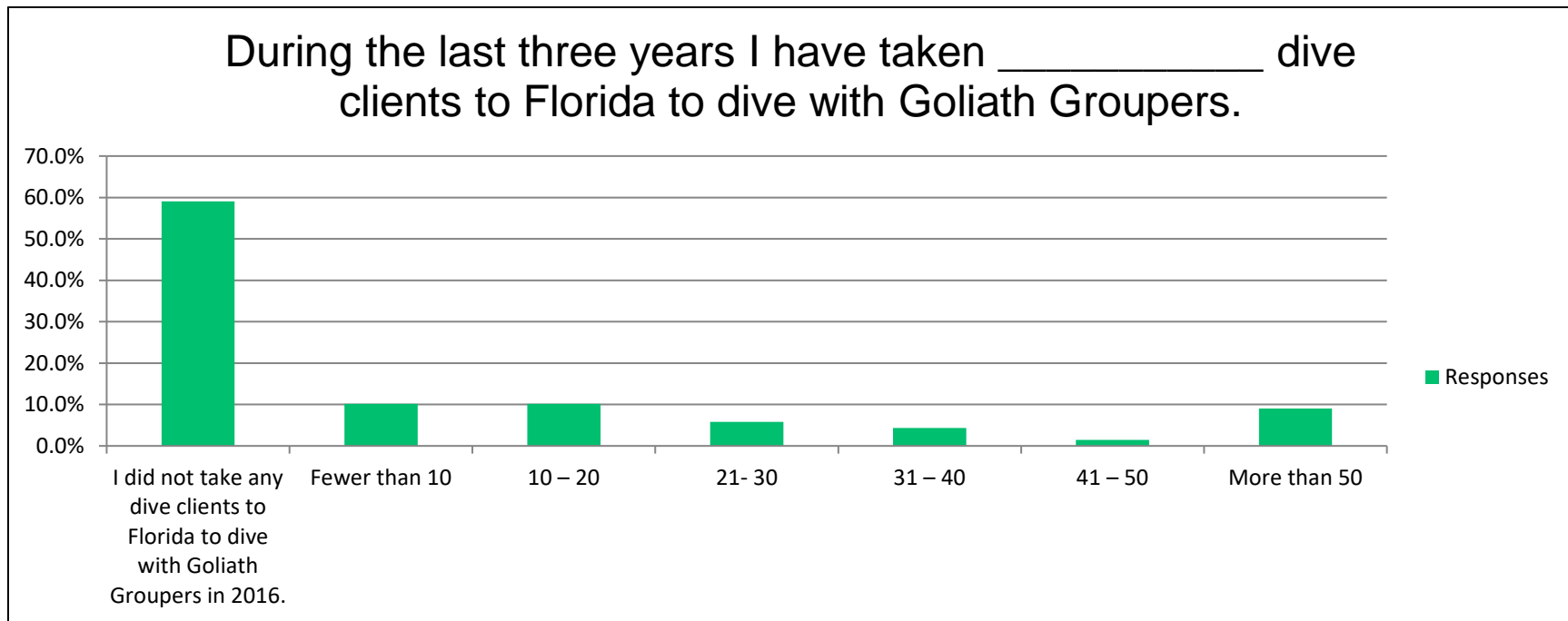
| Answer Choices | Responses |
|---|------------|
| I did not take any dive groups to Florida to see with Goliath Groupers in the last three years. | 58.8% |
| 1 | 5.8% |
| 2 | 5.8% |
| 3 | 6.9% |
| 4 | 2.5% |
| 5 | 0.4% |
| More than 5 | 19.9% |
| Answered | 277 |
| Skipped | 1 |



4. During the last three years I have taken _____ dive clients to Florida to dive with Goliath Groupers.

As with previous question, the responses here appear to confirm that most respondents were individual divers diving with Goliath grouper. However, almost 41% have taken dive clients to dive with Goliaths and over 9% took more than 50 clients to dive with Goliath Grouper.

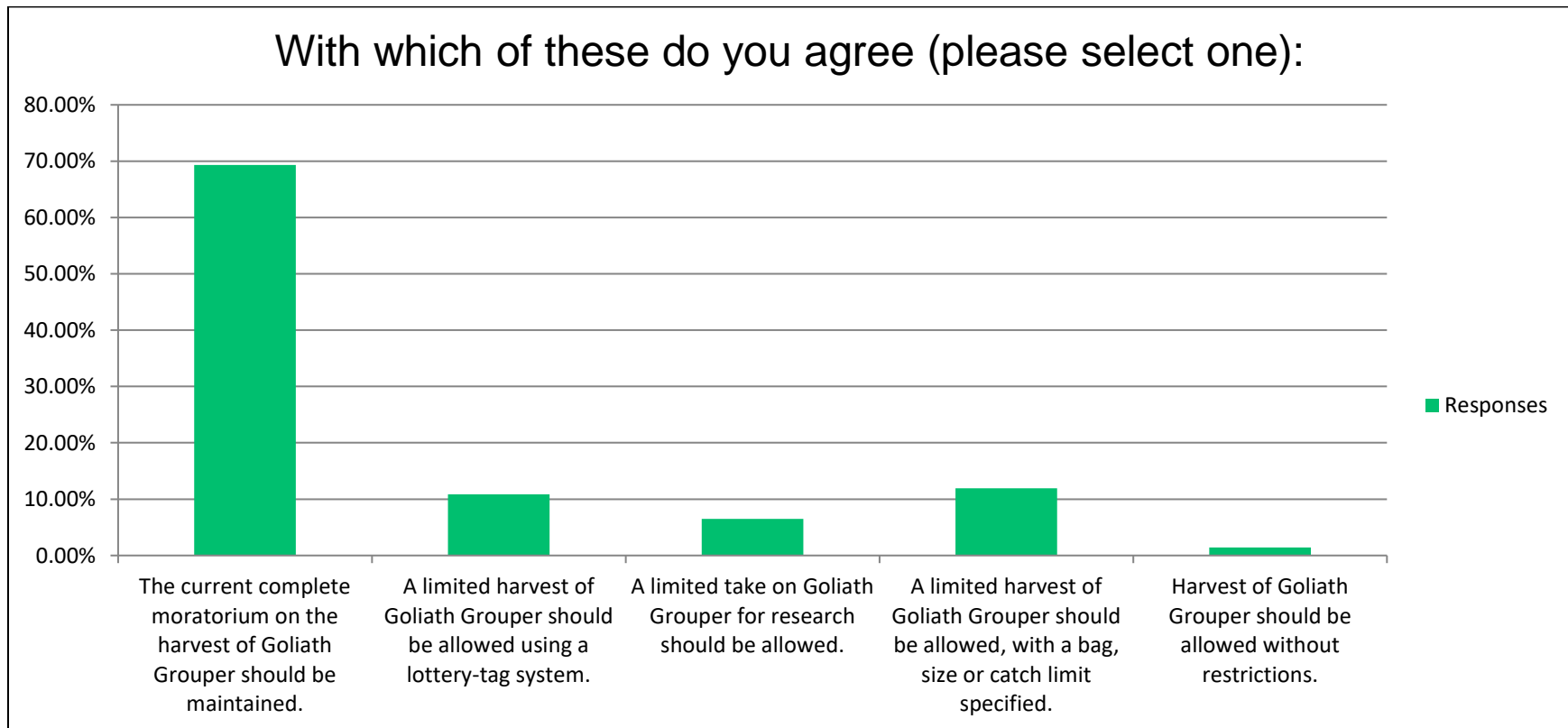
| Answer Choices | Responses |
|---|------------|
| I did not take any dive clients to Florida to dive with Goliath Groupers in 2016. | 59.1% |
| Fewer than 10 | 10.1% |
| 10 – 20 | 10.1% |
| 21- 30 | 5.8% |
| 31 – 40 | 4.4% |
| 41 – 50 | 1.5% |
| More than 50 | 9.1% |
| Answered | 276 |
| Skipped | 2 |



5. With which of these statements do you agree (please select one):

More than 69% of all respondents agree that the current moratorium on harvesting Goliath Grouper should be maintained.

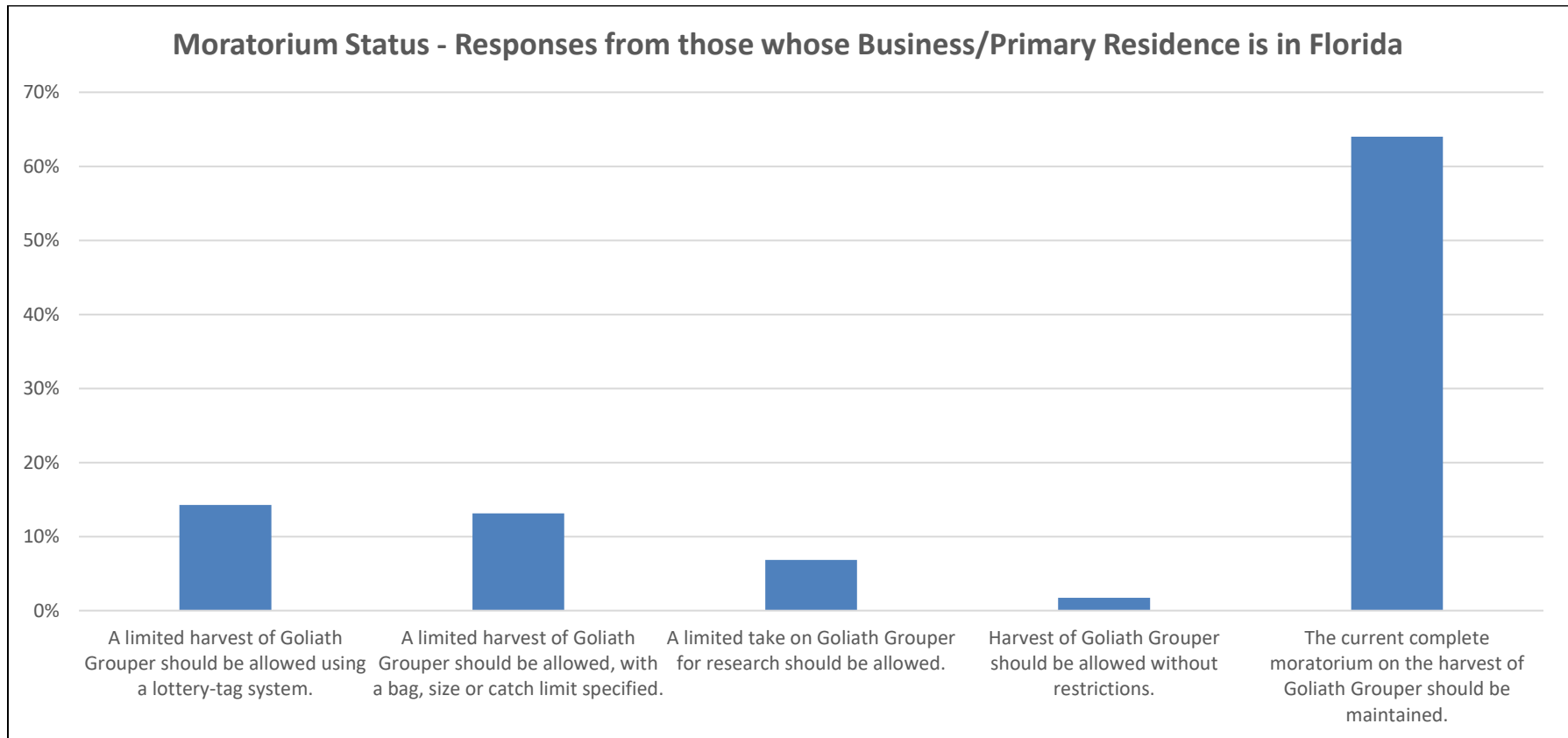
| Answer Choices | Responses |
|--|------------|
| The current complete moratorium on the harvest of Goliath Grouper should be maintained. | 69.3% |
| A limited harvest of Goliath Grouper should be allowed using a lottery-tag system. | 10.8% |
| A limited take on Goliath Grouper for research should be allowed. | 6.5% |
| A limited harvest of Goliath Grouper should be allowed, with a bag, size or catch limit specified. | 11.9% |
| Harvest of Goliath Grouper should be allowed without restrictions. | 1.4% |
| Answered | 277 |
| Skipped | 1 |



6. Moratorium Status - Responses from those whose Business/Primary Residence is in Florida

Of those whose business or primary residence is in Florida, 64% favor maintaining a complete moratorium on harvesting the Goliath Grouper.

| Answer Choices | Responses |
|--|-------------|
| A limited harvest of Goliath Grouper should be allowed using a lottery-tag system. | 14.3% |
| A limited harvest of Goliath Grouper should be allowed, with a bag, size or catch limit specified. | 13.1% |
| A limited take on Goliath Grouper for research should be allowed. | 6.9% |
| Harvest of Goliath Grouper should be allowed without restrictions. | 1.7% |
| The current complete moratorium on the harvest of Goliath Grouper should be maintained. | 64.0% |
| Total | 100% |



7. Moratorium Status – Based on Number of Goliath Grouper Dives Made in the Last Three Years

Based on the number of Goliath Grouper dives conducted in the last three years by respondents, more than 69% favor maintaining the complete moratorium on harvesting the Goliath Grouper.

| Answer Choices | 0 Dives | 1 Dive | 2 Dives | 3 Dives | 4 Dives | 5 Dives | More than 5 Dives | Total |
|--|------------|------------|-----------|------------|-----------|-----------|-------------------|-------------|
| A limited harvest of Goliath Grouper should be allowed using a lottery-tag system. | 4% | 1% | 0% | 0% | 1% | 0% | 5% | 11% |
| A limited harvest of Goliath Grouper should be allowed, with a bag, size or catch limit specified. | 5% | 0% | 0% | 0% | 0% | 0% | 6% | 12% |
| A limited take on Goliath Grouper for research should be allowed. | 2% | 1% | 0% | 0% | 0% | 0% | 3% | 7% |
| Harvest of Goliath Grouper should be allowed without restrictions. | 0% | 0% | 0% | 0% | 0% | 0% | 1% | 1% |
| The current complete moratorium on the harvest of Goliath Grouper should be maintained. | 15% | 9% | 5% | 9% | 3% | 2% | 26% | 69% |
| Total | 26% | 11% | 6% | 10% | 4% | 2% | 40% | 100% |

