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Stan Hubbard

Signature of Camera Operator

3-15-2010

Date

LIST OF FILES

SCOMM 156: JOINT COOK INLET SALMON INDUSTRY TASK FORCE,
2007-2009

MEMBERS:

REPRESENTATIVE CRAIG JOHNSON, CHAIR
SENATOR LYDA GREEN, VICE-CHAIR
REPRESENTATIVE MIKE DOOGAN
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SENATOR BILL WIELECHOWSKI

Established by LR 51, 2008 (SCR 21)

Contents: 5 files.

Joint Cook Inlet Salmon Industry Task Force draft report, meeting agendas and meeting audio 5/22/08 - 1/29/09, information presented at meetings, correspondence, and background links and documents, most of which is in the following files, are currently on the Joint Cook Inlet Salmon Task Force website at <http://housemajority.org/coms/index.php?c=80>

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2. Information presented on January 29, 2009
3. Information presented on October 9, 2008
4. Information presented on June 25, 2008 (file 1)
5. Information presented on June 25, 2008 (file 2)
6. Information presented on May 29, 2008
7. Information presented on May 22, 2008
8. Correspondence
9. Background Links and Documents
10. Incomplete Draft Report

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The 26th Alaska State Legislature, 1st Session

Legislator/Bill Search...

Staff & Members**Joint Cook Inlet Salmon Task Force**

Chair, Representative Craig Johnson



Chair, Rep. Craig Johnson
(R-28)

- [Staff](#)
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Interim:
716 W. 4th Ave. Suite
620
Anchorage, AK
99501-2133
Committee Phone:
907-269-0200
Committee Fax:
907-269-0204

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Staff

No Staff At this time

Task Force Members

- Meets at the call of the Chair

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The 26th Alaska State Legislature, 2nd Session

Joint Cook Inlet Salmon Task Force

Enabling Legislation

- [SCR 21](#) [PDF:17KB]
- [BASIS information on SCR 21](#)

Agenda

- [Agenda for Juneau Meeting on January 29th, 2009](#) [PDF:33KB]
- [Agenda for Anchorage Meeting on October 9th, 2008](#) [PDF:85KB]
- [Agenda for Anchorage Meeting on June 25th, 2008](#) [PDF:151KB]
- [Agenda for Mat-Su Meeting on May 29nd, 2008](#) [PDF:155KB]
- [Agenda for Soldotna Meeting on May 22nd, 2008](#) [PDF:53KB]

Incomplete Draft Report

- [Incomplete Draft Report with cover letter from Rep. Craig Johnson](#) [PDF:645KB]

Juneau Meeting - Information Presented on January 29, 2009

- [Meeting Audio](#) [MP3:69.04MB]
- [2008 Upper Cook Inlet Commercial Salmon Fishery Summary, ADF&G - January 26, 2009](#) [PDF:173KB]
- [Revised Comparison of Recent Sport and Commercial Fisheries Economic Studies - Gunnar Knapp, Professor of Economics, ISER - UAA, January 29, 2009](#) [PDF:637KB]
- [Comparison of Recent Sport and Commercial Fisheries Economic Studies - Gunnar Knapp, Professor of Economics, ISER - UAA, January 29, 2009](#) [PDF:697KB]
- [The Economic Impacts and Contributions of Sportsfishing in Alaska, 2007](#) [PDF:5.70MB]
- [The Seafood Industry in Alaska's Economy - January 2009](#) [PDF:1.33MB]

Anchorage Meeting - Information Presented on October 9, 2008

- [Meeting Audio](#) [MP3:102.23MB]
- [Presentation by Ray Riutta, Executive Direct, Alaska Seafood Marketing Institute - October 9, 2008](#) [PDF:23KB]
- [Report to the Cook Inlet Task Force on the Buy-Back Program under the Alaska Limited Entry Act, Bruce Twomley, Commission Commercial Fisheries Entry Commission - October 7, 2008](#) [PDF:511KB]
- [Issues Related to the 2008 Upper Cook Inlet Salmon Season - ADF&G, Septembr 23, 2008](#) [PDF:6.71MB]

Anchorage Meeting - Information Presented on June 25, 2008

Note: Section 8, Documents 1-5 are answers to information requests made to the Department in previous meetings.

- [Meeting Audio](#) [MP3:24.57MB]
- [Section 1 - doc 6a - Introduction to Genetics](#) [PDF:1.08MB]
- [Section 2 - doc 6b - Post-season Stock Composition Analysis of Upper Cook Inlet Sockeye Salmon Harvest, 2005-2007](#) [PDF:2.50MB]
- [Section 3 - Back up doc 7a - Upper Cook Inlet Salmon Management Plans and Issues - Mar 9, 2007](#) [PDF:438KB]
- [Section 3 - Back up doc 7b - Upper Cook Inlet Stocks of Concern Recommendation - Sept 25, 2007](#) [PDF:219KB]

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- [Section 3 - Back up doc 7c - Upper Cook Inlet Potential Management Options - Jan 24, 2008](#) [PDF:309KB]
- [Section 3 - Back up doc 7d - Upper Cook Inlet Stocks of Concern Follow-up on Yentna River Sockeye Salmon](#) [PDF:62KB]
- [Section 4 - doc 7e - Susitna Sockeye Salmon Action Plan - Feb 8, 2008](#) [PDF:239KB]
- [Section 5 - Back up doc 7f - Matanuska-Susitna Region Salmon Research Plan - Mar 18, 2008](#) [PDF:685KB]
- [Section 5 - Back up doc 7g - Anchor River Chinook Salmon Stock Status and Action Plan - Nov 2001](#) [PDF:100KB]
- [Section 5 - Back up doc 7h - Kvichak River Sockeye Salmon Stock Status and Action Plan - Nov 2006](#) [PDF:302KB]
- [Section 6 - doc 8 - Economic Significance of Fishing in Alaska During 2007 - Jun 25, 2008](#) [PDF:225KB]
- [Section 7 - doc 9 - Management and Stock Status of Northern and Western Cook Inlet Sport Fisheries](#) [PDF:1.61MB]
- [Section 8 - doc 1 - License Sales by Region between 2001 and 2007](#) [PDF:16KB]
- [Section 8 - doc 2 - Participation, Catch, and Harvest in Alaska Sport Fisheries During 2004](#) [PDF:5.68MB]
- [Section 8 - doc 3 - Upper Cook Inlet Subsistence Harvest between 1980 and 2007](#) [PDF:13KB]
- [Section 8 - doc 4 - Upper Cook Inlet Drift and Set Gillnet Participation 1995 - 2007](#) [PDF:12KB]
- [Section 8 - doc 5 - Management Actions in the Cook Inlet Fisheries to Conserve Northern Cook Inlet Sockeye and Coho Salmon](#) [PDF:15KB]

Mat-Su Meeting - Information Presented on May 29, 2008

- [Meeting Audio - part 1](#) [MP3:112.74MB]
- [Meeting Audio - part 2](#) [MP3:110.00MB]
- [An Overview of the Alaska Board of Fisheries Process - Jim Marcotte, Executive Director, Alaska Board of Fisheries, ADF&G](#) [PDF:1.08MB]
- [Economic Impacts and Net Economic Value of Cook Inlet Commercial and Sport Salmon Fisheries: What We Know and What We Don't Know - Gunnar Knapp, Professor of Economics, UAA - May 29, 2008](#) [PDF:27KB]
- [Ghost Dollars and Economics - The Economic Value of Sport vs Commercial Fishing, Roland Maw](#) [PDF:46KB]
- [Testimony from Carl Grauvogel on Salmon Management - Retired ADF&G Biologist](#) [PDF:76KB]
- [Letter to Curt Menard, Mayor of the Matanuska-Susitna Borough, from Tom Kluberton, Chairman - May 16, 2008](#) [PDF:95KB]
 1. [Policy for the Management of Sustainable Salmon Fisheries - 5 AAC 39.222](#) [PDF:469KB]
 2. [Susitna Sockeye Salmon Stock Status and Action Plan - ADF&G, Feb 2008](#) [PDF:153KB]
 3. [Kvichak River Sockeye Salmon Stock Status and Action Plan - Steve Morstad, Timothy Backer, ADF&G, Nov 2006](#) [PDF:820KB]
 4. [Norton Sound Shaktoolik & Unalakleet Subdistricts Chinook Salmon Stock Status and Action Plan - Wesley Jones, ADF&G](#) [PDF:595KB]
- [Letter to Representative Craig Johnson, from Bob Shavelson, Executive Director, Cook Inlet Keeper - June 3, 2008](#) [PDF:89KB]
- [Guide to Meeting Documents from the February 1-12, 2008 Board of Fisheries Upper Cook Inlet Finfish Meeting - Jim Marcotte, Executive Director, Alaska Board of Fisheries, ADF&G](#) [PDF:63KB]
- [A 5-Year Assessment Based on the Marine Stewardship Council Program - The Commercial Alaska Salmon Fisheries Managed by the ADF&G - Oct 30, 2007](#) [PDF:559KB]
- [The Matanuska Susitna Basin Salmon Conservation Partnership Brochure](#) [PDF:548KB]
- [Log of individuals and organizations testifying](#) [PDF:59KB]

Soldotna Meeting - Information Presented on May 22, 2008

- [Gavel to Gavel Audio - part 1](#) [MP3:15.15MB]
- [Gavel to Gavel Audio - part 2](#) [MP3:19.89MB]
- [Economic Comparisons of Commercial and Sport Fisheries: Measures, Things to Keep in Mind, and Potential Misuses - Gunnar Knapp, Professor of Economics, UAA - May 22, 2008](#) [PDF:27KB]
- [Cook Inlet Map](#) [JPG:58KB]
- [Central Northern Portion of Upper Cook Inlet](#) [JPG:54KB]
- [Testimony from Len Malmquist](#) [PDF:18KB]
- [Testimony from the Cook Inlet Sportfishing Caucus - Bob Penney](#) [PDF:21KB]
- [Testimony from Don Johnson](#) [PDF:46KB]
- [Testimony from the South Central Alaska Dip-netters - Dennis Gease](#) [PDF:10KB]
- [Cook Inlet Aquaculture Association - Gary Pandrei, Executive Director](#) [PDF:1.96MB]
- [Proposed Findings by United Cook Inlet Drift Association](#) [PDF:803KB]
- [Testimony from Mel Krogseng](#) [PDF:26KB]
- [Economic Values of Sport, Personal Use, and Commercial Salmon Fishing in Upper Cook Inlet - Kenai River Sportfishing Association](#) [PDF:4.86MB]
- [Comments on Cook Inlet Surveillance Audit - Kenai River Sportfishing Association](#) [PDF:73KB]
- [Testimony from Bruce Knowles](#) [PDF:102KB]
- [Commercial Harvest, Unemployment, and Taxable Sales figures from the Kenai Peninsula Borough from 1987 through 2007](#) [PDF:16KB]
- [A Primer on Salmon Escapement Goals and Fisheries Management in Alaska, Charoles O. Swanton, ADF&G, Division of Sport Fish](#) [PDF:2.30MB]
- [Overview of Upper Cook Inlet Salmon Management & Management Plans, John Hilsinger, ADF&G Director of Commercial Fisheries](#) [PDF:351KB]
- [Log of individuals and organizations testifying](#) [PDF:85KB]

Correspondence

- [Letter to Task Force from the Kenai Peninsula Fishermen's Association - February 11, 2009](#) [PDF:169KB]
- [Letter to Task Force from the United Cook Inlet Driftnet Association - January 23, 2009](#) [PDF:90KB]
- [Letter from Mat-Su Mayor's Blue Ribbon Sportsmen Committee to the Task Force - December 5, 2008](#) [PDF:161KB]
- [Letter from Kenai Area Fisherman's Coalition to the Task Force - October 27, 2008](#) [PDF:60KB]

Background Links and Documents

- [Economic Significance of Sport Fishing in Alaska - Sport Fishing Contributes Money and Jobs to the Alaskan Economy](#) ☞
- [2008 Mat-Su Basin Salmon Science & Restoration Symposium](#) [PDF:3.55MB]
- [Emergency Regulations Regarding Drift Gillnet Use in the Cook Inlet Area](#) [PDF:70KB]
- [AK Dept. of Fish & Game - Division of Commercial Fisheries](#) ☞
- [AK Dept. of Fish & Game - Division of Commercial Fisheries - Upper Cook Inlet Fisheries - Salmon and Herring](#) ☞
- [AK Dept. of Fish & Game - Cook Inlet Fisheries - Sport, Commercial, Personal Use, and Subsistence](#) ☞
- [AK Dept. of Fish & Game - Sport Fish Division](#) ☞ [CFM]
- [AK Dept of Fish & Game - Board of Fisheries - Upper Cook Inlet February 2008 meeting \(scroll to bottom\)](#) ☞
- [Review of Salmon Escapement Goals in Upper Cook Inlet, Alaska, 2007](#) ☞ [PDF]
- [Post-season Stock Composition Analysis of Upper Cook Inlet Sockeye Salmon Harvest, 2005-2007](#) ☞ [PDF]
- [ADF&G Press Release: Upper Cook Inlet 2008 Outlook for Commercial Salmon Fishing](#) [PDF:129KB]
- [ADF&G Susitna Sockeye Salmon Action Plan - February 2008](#) [PDF:153KB]
- [Letter from United Cook Inlet Drift Association to Task Force](#) [PDF:66KB]
- [Letter from Senator Wagoner to Commissioner Lloyd](#) [PDF:64KB]
- [Letter from John Hilsinger, Director, Division of Commercial Fisheries & Charlie Swanton, Director, Division of Sport Fish, to Senator Wagoner](#) [PDF:211KB]

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156:1

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JOINT COOK INLET SALMON TASK FORCE

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Joint Cook Inlet Salmon Task Force
Thursday, January 29, 2009
10:00 a.m. – 12:00 p.m.
Juneau, Barnes Room 124

AGENDA

+ Opening remarks by Representative Craig Johnson, Chair

Gunnar Knapp, Professor of Economics
Institute of Social and Economic Research,
University of Alaska Anchorage

Analysis of economic reports and discussion of where
Comparisons can be made
(Economic Impacts and Contributions of Sportfishing
in Alaska, 2007 and
The Seafood Industry in Alaska's Economy)

+ Teleconference and coverage on KTOO Gavel to Gavel

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Joint Cook Inlet Salmon Task Force
Thursday, October 9, 2008
10:00 a.m. – 12:00 p.m.
Anchorage LIO, 2nd Floor Conference Room

AGENDA

Opening remarks by Representative Craig Johnson, Chair

Commercial Fisheries Entry Commission Report on the
Buy-back Program under the Alaska Limited Entry Act

Alaska Seafood Marketing Institute Presentation on
Sustainability and Management Practices in
Marketing Alaska Salmon

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JOINT COOK INLET SALMON TASK FORCE

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Joint Cook Inlet Salmon Task Force
Wednesday – June 25, 2008
1:30 p.m. to 5:00 p.m.
Anchorage LIO, 2nd Floor Conference Room
716 W. 4th Ave.

AGENDA

Opening comments by Chairman Johnson

Upper Cook Inlet Task Force Presentations by ADF&G

Introduction to Genetics

– Bill Templin (Section 1 – Doc 6a)

Post-season Stock Analysis of Upper Cook Inlet

Sockeye Salmon Commercial Harvest, 2005-2007

– Chris Habicht (Section 2 – Doc 6b & Section 3 Doc 7a - d)

Susitna River Sockeye Salmon Action Plan

– Tom Vania & Tracy Lingnau (Sec 4 – Doc 7e & Sec 5 – Doc 7 f-h)

Economic Significance of Sport Fishing in AK during 2007: Project Update

– Bill Romberg (Section 6 – Doc 8)

Management and Stock Status of Northern Cook Inlet Sport Fisheries

– Dave Rutz (Section 7 – Doc 9)

Questions and Answers (Section 8 – Doc 1 – 5 answers to information requests made to the Department in previous meetings)

Adjourn the Meeting

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Joint Cook Inlet Salmon Task Force
Thursday, May 29, 2008
3:00 p.m. – 9:00 p.m.

AT&T Sports Center

1507 N. Double B Street
¾ mile west off Trunk Road off the Palmer-Wasilla Hwy

AGENDA

- | | |
|-------------------------|---|
| 3:00 – 3:10 p.m. | Open meeting by Rep. Craig Johnson, Chair |
| 3:05 – 5:00 p.m. | Department of Fish and Game Overview
See second page |
| 5:00 – 6:00 p.m. | Dinner Break – Order In for Task Force |
| 6:00 – 9:00 p.m. | Public Testimony |

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Joint Cook Inlet Salmon Task Force
Thursday, May 22, 2008
3:00 p.m. – 9:00 p.m.
City of Soldotna Sports Center
538 Arena Drive

AGENDA

- 3:00 – 3:10 p.m. Open meeting by Rep. Craig Johnson, Chair
- 3:10 – 5:00 p.m. Department of Fish and Game Overview
See second page
- 5:00 – 6:00 p.m. Dinner Break – Order In for Task Force
- 6:00 – 9:00 p.m. Public Testimony

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Joint Cook Inlet Salmon Task Force

Thursday, May 29, 2008

3:00 p.m. – 9:00 p.m.

AT&T Sports Center

1507 N. Double B Street

$\frac{3}{4}$ mile west off Trunk Road off the Palmer-Wasilla Hwy

AGENDA

- | | |
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| 3:00 – 3:10 p.m. | Open meeting by Rep. Craig Johnson, Chair |
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See second page |
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ALASKA STATE LEGISLATURE

Joint Cook Inlet Salmon Task Force Thursday, May 22, 2008

3:05 p.m. - 5:00 p.m.

JOINT COOK INLET SALMON TASK FORCE

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Denby Lloyd, Commissioner

Representative Craig Johnson, Chair
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Jim Marcotte, Executive Director, Alaska Board of Fisheries

Rob Bentz, Deputy Director, Sport Fish Division

James Hasbrouck, Regional Supervisor, Sport Fish Division

Tom Vania, Regional Management Biologist, Sport Fish Division

Dave Rutz, Area Management Biologist, Sport Fish Division

Patti Nelson, Deputy Director, Commercial Fisheries Division

Jeff Regnart, Regional Supervisor, Commercial Fisheries Division

Tracy Lingnau, Regional Management Coordinator, Commercial Fisheries Division

Jeff Fox, Area Management Biologist, Commercial Fisheries Division

Lowell Fair, Regional Research Biologist, Commercial Fisheries Division

Open meeting by Rep. Craig Johnson, Chair

3:00 - 3:10 p.m.

Department of Fish and Game Overview
See second page

3:05 - 5:00 p.m.

Dinner break - Order in for Task Force

5:00 - 6:00 p.m.

Public Testimony

6:00 - 9:00 p.m.

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Representative
Kyle Johnson

Representative
Mark Johnson

Representative
Mike Deegan

Senator
Charles Hansen

Senator
Liam McGuire

Senator
Tom Wooten

Senator
Bill Wooten

ALASKA STATE LEGISLATURE

JOINT COOK INLET SALMON TASK FORCE

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Joint Cook Inlet Salmon Task Force
Thursday, May 22, 2008
3:00 p.m. – 9:00 p.m.
City of Soldotna Sports Center
538 Arena Drive

AGENDA

- 3:00 – 3:10 p.m. Open meeting by Rep. Craig Johnson, Chair**
- 3:10 – 5:00 p.m. Department of Fish and Game Overview
See second page**
- 5:00 – 6:00 p.m. Dinner Break – Order In for Task Force**
- 6:00 – 9:00 p.m. Public Testimony**

ALASKA STATE LEGISLATURE

Joint Cook Inlet Salmon Task Force Thursday, May 22, 2008

3:10 p.m. – 5:00 p.m.

Swanton, Charles, Division Director, Fish and Game

SPF-SPORT FISH HQ

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charles.swanton@alaska.gov

Hilsinger, John, Division Director Fish and Game

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156:2

ALASKA DEPARTMENT OF FISH AND GAME

DIVISION OF COMMERCIAL FISHERIES

NEWS RELEASE



Denby S. Lloyd, Commissioner
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2008 UPPER COOK INLET COMMERCIAL SALMON FISHERY SUMMARY

The 2008 Upper Cook Inlet (UCI) commercial harvest of 2.8 million salmon is approximately 1.5 million fish below the average long-term harvest in UCI (Table 1). While all five species of Pacific salmon are present in Upper Cook Inlet, the primary focus of the commercial fishery is sockeye salmon. Sockeye salmon escapement goals are monitored in six systems in UCI. In 2008 two were within, two were below, and two were over the goal ranges (see table below and Table 2).

System	2008 Inriver Estimate	Lower Goal	Upper Goal
Crescent River	62,030	30,000	70,000
Fish Creek	19,339	20,000	70,000
Kasilof River ^a	301,469	150,000	250,000
Kenai River	614,946	650,000	850,000
Packers Creek	25,248	15,000	25,000
Yentna River	90,146	90,000	160,000

^a The Kasilof River BEG is 150,000 to 250,000; an OEG was established in 2002 of 150,000 to 300,000 to aid in achieving the lower end of the Kenai River goal.

SOCKEYE SALMON

The preseason forecast for the 2008 season projected a run of 5.6 million sockeye salmon, with a harvest estimate (sport, personal use & commercial) of 3.9 million fish. The total run to the Kenai River, generally the largest producer in UCI, was forecasted to be 3.1 million sockeye salmon. This resulted in managing for an inriver sonar goal range in the Kenai River of 750,000 to 950,000 sockeye salmon. Two regularly scheduled fishing periods plus up to 51 hours of additional fishing time in the Upper Subdistrict set gillnet fishery were allowed under this size or run under the abundance based escapement goal for the Kenai River. In addition, this run strength mandated two closed periods (windows) per week, a 24 and a 36-hour period in the Upper Subdistrict set gillnet fishery.

While the fishing season opens in most of Upper Cook Inlet in mid to late June, participation and harvests remain fairly low until about July 4. In 2008, harvests in the Central District were relatively low through July 12 for a return forecast at the level of 5.6 million; however winds and tides will sometimes have this effect. After July 12, the harvest from each fishing period was approximately one-half of that expected. Beginning July 20, indications from the Offshore Test Fish Program (OTF), coupled with harvests and escapements to date began to indicate the return was not going to be as strong as forecast. On July 24, the run estimate from the OTF was indicating that the run was going to be not only well below forecast but below 2 million triggering a different escapement goal of 650,000–850,000 sockeye salmon and different management parameters. The commercial fishery targeting Kenai Stocks in the Upper Subdistrict and Central District drift gillnet fishery was closed at the end of the July 24 fishing period and remained closed for the remainder of the year due to lagging sockeye passage to the Kenai River. Even with these actions to conserve Kenai Sockeye the inriver goal was not achieved. On August 1, the department assessed the total Kenai River sockeye salmon to be between 1.85 and 1.91 million fish. With this inseason assessment, the inriver goal for the Kenai River became 650,000 to 850,000 sockeye salmon. The final inriver sonar count in the Kenai River was 614,946 sockeye salmon, slightly below the lower end of the inriver goal range for a run of fewer than 2 million. The run in 2008 was approximately 4 days early and much weaker than forecast. Because of the run size estimate being so close to the 2 million demarcation point to the Kenai River and the changes dictated by management plans, it will be several weeks before information from fish tickets and escapements can be tallied for individual river systems to see if the estimates for run strengths listed above are indeed correct.

The UCI commercial harvest of 2.3 million sockeye salmon was significantly below the preseason forecast harvest estimate of 3.9 million and the 9th lowest harvest since 1980. The total run of sockeye salmon to UCI of 4.0 million was 29% less than the preseason forecast (see table below). Returns to all systems were significantly less than the forecast with the largest disparity in numbers of fish being with the run forecast to the Kenai River where the forecast was approximately 1 million fish off.

System	Forecast	Actual	Difference
Crescent River	100,000	82,000	-18%
Fish Creek	53,000	28,000	-50%
Kasilof River	1,286,000	1,100,000	-14%
Kenai River	3,064,000	2,086,000	-32%
Susitna River	344,000	307,000	-11%
Minor Systems	727,000	336,000	-54%
Overall Total	5,574,000	3,943,000	-29%

Sockeye salmon prices at the beginning of the season were in the range of \$1.20 per pound. The total exvessel value in UCI for sockeye salmon was approximately \$18.0 million, which was 92.5% of the total UCI exvessel value.

COHO SALMON

The 2008 coho salmon harvest of 166,475 was slightly below the recent 10-year average harvest of 188,000 and approximately half of the 1966–2007 long term average coho salmon harvest of 316,000. Commercial coho salmon harvests in 2008 were likely reduced due to restrictions in area to the drift fleet endeavoring to achieve the Yentna Sockeye escapement goal, as well as several periods closed in the Northern District set gillnet fishery for the same reason, and also due to an early closure in the drift fishery and Upper Subdistrict set gillnet on July 24 for most of the rest of the season. The coho salmon run in 2008 was judged to be above average. Commercial coho salmon harvests in UCI during the 1980's and early 1990's were much higher than the long term average due to good coho salmon production, and also due to strong sockeye salmon returns to Upper Cook Inlet, which resulted in more fishing time in the Central District. Since 1996, BOF regulations have reduced the fishing time of the drift fleet in the Central District and eliminated additional fishing time directed at coho salmon surpluses in the Northern District, Kalgin Island and Upper Subdistricts of the Central District, which has resulted in marked reductions in the commercial exploitation of this species. The only significant coho salmon return to UCI that is monitored with an escapement goal is the Little Susitna River. In 2008, the final escapement count of 18,485 was slightly below the upper end of the escapement goal range of 19,200. The exvessel value of coho salmon to the commercial fishery was approximately \$700,000 or 3.6% of the total exvessel value in Upper Cook Inlet.

PINK SALMON

Approximately 168,000 pink salmon were harvested in 2008. This figure is approximately 75% of the recent 10-year average pink salmon harvest of 187,000 and about one third of the average harvest of 490,000 since 1966. Pink salmon harvests were impacted by the restrictions implemented for Yentna River sockeye salmon and the early termination of the Upper Subdistrict set gillnet fishery. Pink salmon escapements are not monitored in Upper Cook Inlet to an appreciable degree; however it appears that escapements to most river systems were very good. Prices paid for pink salmon ranged from approximately \$.10 to \$.35 per pound, resulting in an exvessel value for this species of \$150,000, less than 1% of the total exvessel.

CHUM SALMON

The 2008 harvest of 51,301 chum salmon was well below the long-term average harvest of approximately 500,000 chum salmon. The 2008 chum salmon harvest was approximately 50% less than the recent 10-year average harvest of 120,000. Much of this reduction in harvest is the result of reduced fishing time in traditional fishing areas, primarily by the drift fleet, due to sockeye salmon concerns to Northern Cook Inlet. Following the flood of 1986 through the mid 1990s, chum salmon production in much of Southcentral Alaska was poor. Since the mid-1990s however, chum salmon production has increased. Chum salmon runs to most of Cook Inlet in 2008 were good by recent standards. The exvessel value of chum salmon to the commercial fishery was approximately \$150,000, or less than 1% of the total value.

CHINOOK SALMON

The 2008 harvest of 12,917 Chinook salmon is 25% below both the long and short-term average harvests of 16,200. The two fisheries where Chinook salmon are harvested in appreciable numbers in UCI are in the set gillnet fisheries in the Northern District King Salmon Fishery and in the Upper Subdistrict of the Central District. After experiencing a significant downturn in the early to mid 1990s, Northern District Chinook salmon stocks rebounded and were relatively strong for the preceding 10 years. However, in 2008, the Deshka River Chinook salmon run, which is the generally the largest run in the region was below average failing to meet its escapement goal. Closures were implemented with 1 of the 5 allowable king salmon periods being closed and the first regular sockeye period on June 26 was also closed in the Northern District to conserve Chinook salmon. Harvests in the Northern District fishery remain well below the harvest cap of 12,500 Chinook salmon due to reduced participation and regulatory closures of the highest producing fishing sites located north of the Theodore River. The 2008 harvest in the Northern District of 4,000 Chinook salmon is about 1,600 fish higher than the recent 10-year average harvest of 2,400 Chinook salmon. This is most likely due to changes made by the BOF in 2005 lengthening the fishing periods from 6 hours to 12 hours on each Monday. In 2008, the commercial harvest in the Upper Subdistrict set gillnet fishery of 7,000 Chinook salmon was about 75% of the average harvest since 1966 when harvest records were available. Late-run Kenai River Chinook salmon runs have been relatively stable and escapement objectives have been consistently achieved or exceeded. Beginning in 1999, a 24-hour closed period per week was mandated for the set gillnet fishery in the Upper Subdistrict. Since that time, longer closed periods of 36-hours or two shorter closed periods each week, a 24 and a 36-hour closed period, have also been adopted into regulation. The stated purpose of these closed periods is to pass fish into the inriver recreational fishery for the weekends. However, when large numbers of sockeye salmon pass into the Kenai and Kasilof Rivers during closed windows, allowable fishing time is maximized when fewer sockeye salmon are moving into UCI in an attempt to keep sockeye salmon goals within their ranges. This may result in increased Chinook salmon harvest in the set gillnet fishery. In 2008, the exvessel value for Chinook salmon was \$461,000 which is approximately 2.4% of the total exvessel value.

Table 1. Upper Cook Inlet commercial salmon harvest by species, 1966–2008.

Year	Chinook	Sockeye	Coho	Pink	Chum	Total
1966	8,544	1,852,114	289,837	2,005,745	532,756	4,688,996
1967	7,859	1,380,062	177,729	32,229	296,837	1,894,716
1968	4,536	1,104,896	468,160	2,276,993	1,107,903	4,962,488
1969	12,386	691,815	100,684	32,499	267,686	1,105,070
1970	8,336	732,572	275,205	814,760	750,774	2,581,647
1971	19,765	636,289	100,362	35,590	323,945	1,115,951
1972	16,086	879,811	80,896	628,566	626,414	2,231,773
1973	5,194	670,098	104,420	326,184	667,573	1,773,469
1974	6,596	497,185	200,125	483,730	396,840	1,584,476
1975	4,787	684,751	227,376	336,330	951,588	2,204,832
1976	10,865	1,664,149	208,663	1,256,728	469,180	3,609,585
1977	14,790	2,052,291	192,593	553,855	1,233,436	4,046,965
1978	17,299	2,621,421	219,193	1,688,442	571,779	5,118,134
1979	13,738	924,406	265,164	72,980	649,758	1,926,046
1980	13,798	1,573,588	271,416	1,786,421	387,815	4,033,038
1981	12,240	1,439,262	484,405	127,143	831,977	2,895,027
1982	20,870	3,259,864	792,224	790,644	1,432,940	6,296,542
1983	20,634	5,049,733	516,322	70,327	1,114,858	6,771,874
1984	10,062	2,106,714	449,993	617,452	680,726	3,864,947
1985	24,088	4,060,429	667,213	87,828	772,849	5,612,407
1986	39,254	4,791,562	757,319	1,300,939	1,134,817	8,023,891
1987	39,431	9,465,994	449,421	109,381	348,809	10,413,036
1988	29,069	6,843,833	560,948	471,076	710,615	8,615,541
1989	26,737	5,011,124	339,818	67,441	122,051	5,567,171
1990	16,105	3,604,259	501,643	603,434	351,123	5,076,564
1991	13,542	2,178,331	426,487	14,663	280,223	2,913,246
1992	17,171	9,108,353	468,930	695,861	274,303	10,564,618
1993	18,871	4,755,329	306,882	100,934	122,770	5,304,786
1994	19,954	3,565,586	583,793	523,434	303,177	4,995,944
1995	17,893	2,951,827	446,554	133,575	529,422	4,079,671
1996	14,306	3,888,922	321,668	242,911	156,501	4,624,308
1997	13,292	4,176,738	152,404	70,933	103,036	4,516,403
1998	8,124	1,219,242	160,660	551,260	95,654	2,034,940
1999	14,383	2,680,510	125,908	16,174	174,541	3,011,516
2000	7,350	1,322,482	236,871	146,482	127,069	1,840,254
2001	9,295	1,826,833	113,311	72,559	84,494	2,106,492
2002	12,714	2,773,118	246,281	446,960	237,949	3,717,022
2003	18,490	3,476,159	101,756	48,789	120,767	3,765,961

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Table 1. Page 2 of 2.

Year	Chinook	Sockeye	Coho	Pink	Chum	Total
2004	27,476	4,926,220	311,056	357,939	146,164	5,768,855
2005	28,171	5,238,168	224,657	48,419	69,740	5,609,155
2006	18,029	2,192,730	177,853	404,111	64,033	2,856,756
2007	17,625	3,316,779	177,339	147,020	77,240	3,736,003
2008	12,917	2,362,880	166,475	168,759	51,301	2,762,332
1966-2007 Avg.	16,185	2,933,227	316,284	490,446	469,098	4,225,241
16,166	16,166	2,897,224	187,569	223,971	119,765	3,444,695

Note: Catch statistics prior to 2007 reflect minor adjustments to the harvest database.

Table 2. Sockeye salmon enumeration by river and date, 2008.

	Kenai River		Kasilof River		Crescent River		Yentna River		Fish Creek		Packers Creek	
Date	Daily	Cum	Daily	Cum	Daily	Cum	Daily	Cum	Daily	Cum	Daily	Cum
15-Jun			446	446								
16-Jun			271	717								
17-Jun			477	1,194								
18-Jun			427	1,621								
19-Jun			658	2,279								
20-Jun			3,229	5,508								
21-Jun			3,905	9,413								
22-Jun			5,504	14,917								
23-Jun			7,355	22,272								
24-Jun			4,728	27,000	35	35						
25-Jun			6,437	33,437	53	88						
26-Jun			15,121	48,558	55	143						
27-Jun			7,825	56,383	30	173						
28-Jun			7,849	64,232	20	193						
29-Jun			2,296	66,528	155	348						
30-Jun			4,618	71,146	166	514						
1-Jul	2,474	2,474	2,145	73,291	333	847						
2-Jul	2,791	5,265	2,944	76,235	2,541	3,388						
3-Jul	2,638	7,903	3,150	79,385	1,438	4,826						
4-Jul	1,384	9,287	1,216	80,601	2,859	7,685						
5-Jul	969	10,256	2,082	82,683	1,324	9,009						
6-Jul	890	11,146	1,574	84,257	873	9,882						
7-Jul	829	11,975	5,914	90,171	3,148	13,030	102	102	0	0	289	370
8-Jul	1,069	13,044	3,039	93,210	3,111	16,141	113	215	0	0	948	1,318
9-Jul	2,123	15,167	2,479	95,689	3,734	19,875	136	351	1	1	9	1,327
10-Jul	3,019	18,186	4,371	100,060	3,915	23,790	159	510	1	2	2	1,329
11-Jul	1,527	19,713	2,095	102,155	1,751	25,541	131	641	0	2	24	1,353
12-Jul	2,056	21,769	4,697	106,852	3,765	29,306	299	940	114	116	391	1,744
13-Jul	4,465	26,234	2,147	108,999	3,352	32,658	221	1,161	7	123	475	2,219
14-Jul	2,718	28,952	9,213	118,212	3,629	36,287	370	1,531	0	123	39	2,258
15-Jul	25,514	54,466	19,047	137,259	2,946	39,233	4,635	6,166	0	123	159	2,417
16-Jul	68,124	122,590	18,828	156,087	1,282	40,515	7,164	13,330	0	123	172	2,589
17-Jul	51,062	173,652	12,343	168,430	1,883	42,398	7,249	20,579	12	135	149	2,738
18-Jul	18,535	192,187	7,821	176,251	2,905	45,303	6,389	26,968	304	439	101	2,839
19-Jul	17,110	209,297	19,026	195,277	2,493	47,796	7,923	34,891	386	825	318	3,157
20-Jul	29,398	238,695	5,591	200,868	1,526	49,322	13,571	48,462	315	1,140	225	3,382
21-Jul	32,015	270,710	6,918	207,786	2,067	51,389	8,854	57,316	562	1,702	259	3,641
22-Jul	31,450	302,160	8,292	216,078	1,940	53,329	5,781	63,097	1,004	2,706	742	4,383
23-Jul	10,529	312,689	5,600	221,678	984	54,313	7,147	70,244	3,312	6,018	674	5,057
24-Jul	11,401	324,090	5,470	227,148	437	54,750	3,760	74,004	2,624	8,642	383	5,440

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Table 2. Page 2 of 2.

	Kenai River		Kasilof River		Crescent River		Yentna River		Fish Creek		Packers Creek	
Date	Daily	Cum	Daily	Cum	Daily	Cum	Daily	Cum	Daily	Cum	Daily	Cum
25-Jul	10,920	335,010	8,779	235,927	849	55,599	2,677	76,681	2,124	10,766	622	6,062
26-Jul	7,387	342,397	14,539	250,466	760	56,359	1,053	77,734	441	11,207	20	6,082
27-Jul	16,437	358,834	12,167	262,633	962	57,321	547	78,281	1,243	12,450	1,467	7,549
28-Jul	19,164	377,998	6,844	269,477	1,119	58,440	868	79,149	1,128	13,578	360	7,909
29-Jul	22,136	400,134	3,516	272,993	1,009	59,449	1,103	80,252	665	14,243	726	8,635
30-Jul	26,216	426,350	2,930	275,923	1,062	60,511	582	80,834	207	14,450	1,674	10,309
31-Jul	19,548	445,898	3,525	279,448	412	60,923	932	81,766	1,432	15,882	407	10,716
1-Aug	22,615	468,513	3,256	282,704	592	61,515	669	82,435	168	16,050	116	10,832
2-Aug	17,284	485,797	2,886	285,590	515	62,030	883	83,318	91	16,141	405	11,237
3-Aug	13,332	499,129	3,018	288,608			1,317	84,635	668	16,809	432	11,669
4-Aug	14,327	513,456	2,819	291,427			1,770	86,405	41	16,850	484	12,153
5-Aug	11,409	524,865	2,263	293,690			1,351	87,756	513	17,363	427	12,580
6-Aug	10,903	535,768	1,753	295,443			700	88,456	226	17,589	1,216	13,796
7-Aug	8,477	544,245	1,154	296,597			385	88,841	144	17,733	823	14,619
8-Aug	6,603	550,848	1,161	297,758			307	89,148	83	17,816	310	14,929
9-Aug	7,729	558,577	1,763	299,521			489	89,637	424	18,240	464	15,393
10-Aug	10,802	569,379	1,948	301,469			509	90,146	40	18,280	366	15,759
11-Aug	10,951	580,330							68	18,348	573	16,332
12-Aug	10,392	590,722							401	18,749	436	16,768
13-Aug	7,351	598,073							481	19,230	459	17,227
14-Aug	8,415	606,488							109	19,339	273	17,500
15-Aug	5,448	611,936							0	19,339	700	18,200
16-Aug	1,530	613,466	0								178	18,378
17-Aug	1,480	614,946	0								630	19,008
18-Aug	0		0								284	19,292
19-Aug	0		0								345	19,637
20-Aug	0		0								815	20,452
21-Aug	0		0								543	20,995
22-Aug	0		0								1,849	22,844
23-Aug	0		0								566	23,410
24-Aug	0		0								298	23,708
25-Aug	0		0								455	24,163
26-Aug	0		0								112	24,275
27-Aug	0		0								153	24,428
28-Aug	0		0								231	24,659
29-Aug	0		0								93	24,752
30-Aug	0		0								496	25,248

Note: Days without data indicate days when the project was not operational.

Comparison of Recent Sport and Commercial Fisheries Economic Studies

Presented to the
Cook Inlet Salmon Task Force
January 29, 2009

- Gunnar Knapp
Professor of Economics
Institute of Social and Economic Research
University of Alaska Anchorage
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- Currently teaches courses at UAA on the Alaska Economy and on Fisheries Economics
 - Taught economic issues related to Alaska fisheries for many years
 - Research incorporates revisions to slides 9, 17, 21, 24 & 25 made on February 3, 2009

Who I Am

- Professor of Economics at the UAA Institute of Social and Economic Research (ISER).
- Studied economic issues related to Alaska fisheries for many years.
- Teach courses at UAA on the Alaska Economy and on Fisheries Economics.
- Currently preparing a report on what kinds of economic information exists and does not exist for Alaska's fisheries.

Purpose of Presentation

- Two recent reports have examined economic impacts and contributions of sport fishing and commercial fishing in Alaska.
- I was invited to compare the results of these two reports.

1. What policy conclusions can we draw?
2. How accurate and reliable are the estimates?
3. Comparison of reports, estimates of economic importance
4. Comparison of report methodologies

Outline of presentation

Outline of presentation

1. Comparison of report methodologies
2. Comparison of reports' estimates of economic importance
3. How accurate and reliable are the estimates?
4. What policy conclusions can we draw?

- I was invited to compare the results of these two reports: contributions of sport fishing and commercial fishing in Alaska.
- Two recent reports have examined economic impacts and

Purpose of Presentation

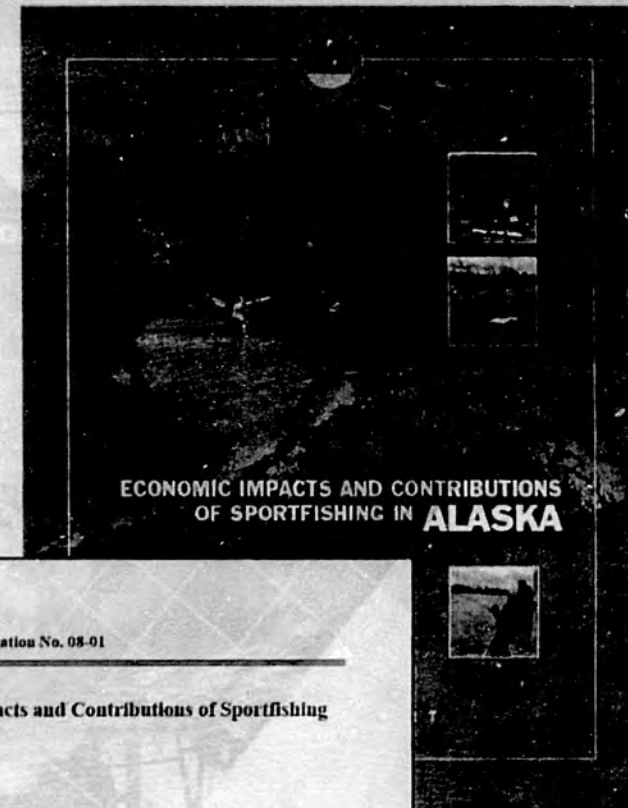
"Sport Fishing Report":

Economic Impacts and Contributions of Sportfishing in Alaska, 2007

available at:

<http://www.sf.adfg.state.ak.us/statewide/economics/>

- Sponsored by: Alaska Department of Fish and Game, Division of Sport Fish
- Prepared by: Southwick Associates, Inc. in cooperation with ADFG staff
- Released: December 2008
- Pages: 289; 12-page summary



Professional Publication No. 08-01

Economic Impacts and Contributions of Sportfishing in Alaska, 2007

by
Southwick Associates, Inc.
and
William J. Romberg
Allen E. Bingham
Gretchen B. Jennings
Robert A. Clark

December 2008

Alaska Department of Fish and Game

Division of Sport Fish



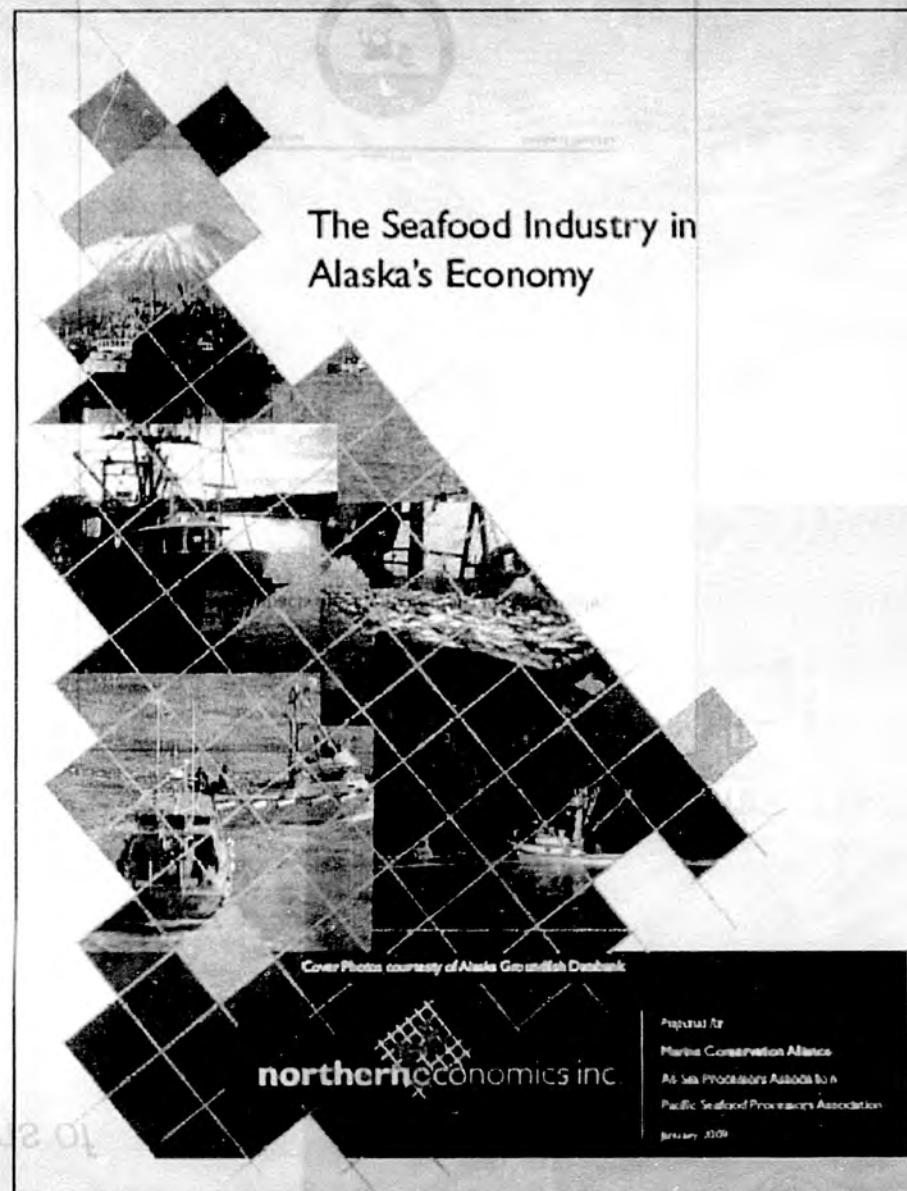
Commercial Fishing Report

The Seafood Industry in Alaska's Economy

available at:

www.marineconservationalliance.org

- Sponsored by: Marine Conservation Alliance; At-Sea Processors Association; Pacific Seafood Processors Association
- Prepared by: Northern Economics, Inc.
- Released January 2009
- Pages: 77



The Sport Fishing and Commercial Fishing Industries

	Commercial fisheries	Sport fisheries
What do they produce?	Fish products	Fish Angling experience Aesthetics Fishing Catching fish
Who are the consumers?	Fish consumers	Sport fishermen
Who is part of the industry?	Commercial fishermen Processors Fish transportation industries Distributors Retailers Restaurants	Charter operators Lodges Transportation industries Any other businesses supplying products or services used in sport-fishing

Purpose of the Reports

SPORT FISHING REPORT

- “to obtain current estimates of the economic contribution of sportfishing activities to the Alaska economy and to develop a consistent method for producing such estimates on a regular basis.”

(Executive summary, page 4)

Major goals were to collect new data and develop a method for estimating economic importance

COMMERCIAL FISHING REPORT

- “to describe the economic importance of Alaska’s seafood industry, focusing primarily on the industry’s significance to the state economy. The report draws on data from a wide range of sources”

(Page 1)

Based on data regularly collected by the state

A starting economic principle:

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- Sales of an industry to non-residents have a different effect on the Alaska economy than sales to residents.
- Sales of an industry to non-residents bring new money into the economy and increase the size of the economy
- Sales of an industry to residents don't necessarily bring new money into the economy and don't necessarily increase the size of the economy
 - Residents have only a limited amount of money to spend
 - If they spend more on Alaska fish or Alaska sport-fishing, they may buy less from other Alaska industries
 - If they spend less on Alaska fish or Alaska sport-fishing, they may buy more from other Alaska industries
 - Sales to residents probably have less effect on the Alaska economy (per dollars of sales) than sales to non-residents
- Economic terminology:
 - Economic contributions: Economic effects of all sales
 - Economic impacts: Economic effects of money brought in from outside the state or outside a region

Alaska's sport fishing and commercial fishing industries differ in the relative mix of sales to non-residents and residents

SPORT FISHING INDUSTRY

- Sales are to both residents and non-residents

SPORT FISHING REPORT

- Distinguishes between effects of sales to residents and non-residents
- Estimates both
 - Economic contributions
 - Economic impacts

COMMERCIAL FISHING INDUSTRY

- Almost all sales are to non-residents

COMMERCIAL FISHING REPORT

- Does not distinguish between effects of sales to residents and non-residents
- Estimates are mainly economic impacts

How economists define economic impacts of an industry ...

“Direct impacts” of the industry	“Indirect & induced impacts” in other industries created as businesses and workers in the industry spend money within Alaska	Total impacts
Sales or “output” of the industry	Sales or “output” in other industries	Total sales
Income earned in the industry	Income earned in other industries	Total income
Jobs or employment in the industry	Jobs or employment in other industries	Total jobs
Taxes paid by the industry	Taxes paid in other industries	Total taxes

Note: Economic contributions are defined in the same way.

How economists estimate economic impacts of an industry:

1. Estimate “direct sales” of the industry
(= total payments to the industry)
2. Use an “input-output model” to estimate how payments to the industry translate into sales of other industries as money circulates through the economy.
3. Use the “input-output model” to estimate how sales translate into income, jobs and taxes

Direct impacts of the industry	Indirect and induced impacts in other industries	Total impacts
Direct sales	Indirect & induced sales	Total sales
Direct income	Indirect & induced income	Total income
Direct jobs	Indirect & induced jobs	Total jobs
Direct taxes	Indirect & induced taxes	Total taxes

How economists estimate economic impacts of an industry:

(simplified)

sectors requires a lot of data and a lot of work!

Making all these assumptions about payments between industry

Estimate "direct sales"
of the industry



Make input-output model
assumptions



Estimate economic
impacts

- Tax payments in Alaska's region

- Payments to workers in Alaska's region

- Purchases from Alaska's region

how \$1 of sales translates

• Make assumptions for each industry sector and each region about

• Divide Alaska economy into geographic regions

• Divide Alaska economy into industry sectors

input-output models require lots of assumptions!

Input-output models require lots of assumptions!

- Divide Alaska economy into industry sectors
- Divide Alaska economy into geographic regions
- Make assumptions, for each industry sector and each region, about how \$1 of sales translates into:
 - Purchases from other Alaska industry sectors, by region
 - Payments to workers in Alaska, by region
 - Tax payments in Alaska, by region

Making all these assumptions about payments between industry sectors requires a lot of data and a lot of work!

So Alaska economic impact studies usually use assumptions based on national studies—which may not be very realistic for Alaska.

Typical problems with comparing economic impact studies for different Alaska industries

- They divide the Alaska economy into different industry sectors
- They use different geographic regions
- They make different assumptions about sales between industry sectors

surveys of anglers
Based on multiple
of the industry
Estimate "direct sales"

SPORT FISHING REPORT

reports of wholesale value
Based on mandatory processor
of the industry
Estimate "direct sales"

COMMERCIAL FISHING REPORT

important differences in how the reports estimated economic impacts

Important differences in how the reports estimated economic impacts

SPORT FISHING REPORT

**Estimate "direct sales"
of the industry**

Based on multiple
surveys of anglers



**Make
input-output model
assumptions**



**Estimate
economic
impacts**

Different
methods for
estimating
direct sales

COMMERCIAL FISHING REPORT

**Estimate "direct sales"
of the industry**

Based on mandatory processor
reports of wholesale value



**Make
input-output model
assumptions**

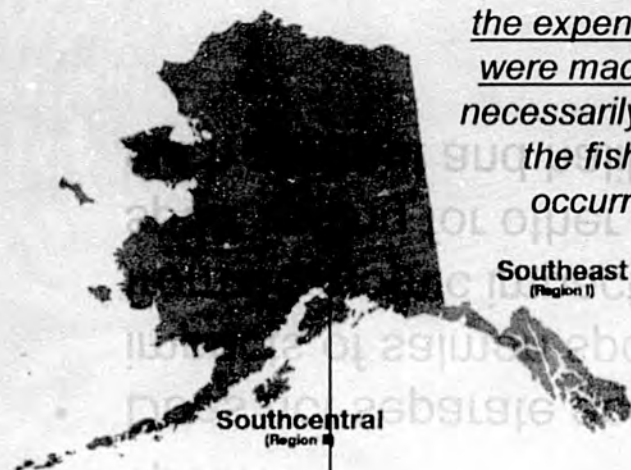


**Estimate
economic
impacts**

Different industry sectors
Different Alaska regions
Different assumptions about
payments between industries
Different definitions for:
"jobs"
"income"
"taxes"

SPORT FISHING REPORT

The sport fishing report regions are the regions where the expenditures were made--not necessarily where the fishing occurred.



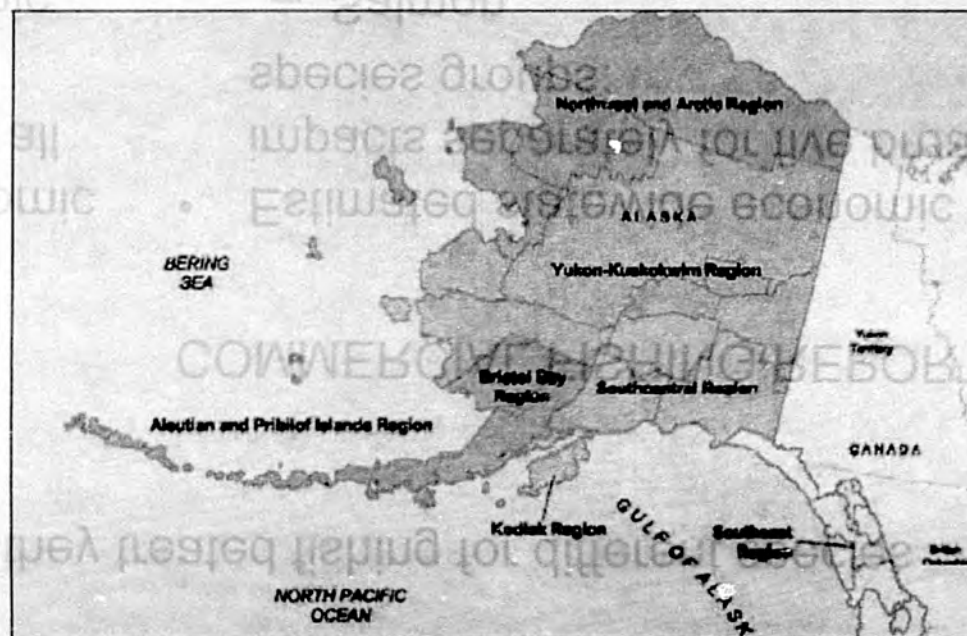
"Cook Inlet Subregion"



The reports divided Alaska into different "economic regions" which are not directly comparable. Only the statewide economic impacts are directly comparable.

The commercial fishing report regions are the regions where the fish were harvested and processed.

COMMERCIAL FISHING REPORT



The reports differed in how they treated fishing for different species

SPORT FISHING REPORT

- Estimated combined economic impacts of sport fishing for all species
- Does not separate economic impacts of salmon sport fishing from economic impacts of sport fishing for other species such as trout and halibut

COMMERCIAL FISHING REPORT

- Estimated statewide economic impacts separately for five broad species groups:
 - Salmon
 - Shellfish
 - Groundfish
 - Halibut
 - Herring

impacts are directly comparable. Only the statewide economic "economic regions," which are not directly comparable. The reports divided Alaska into different

Sources: Sport fishing report: Executive Summary, page 10; Commercial fishing report: Figures 38, 37, 38, 39
 Commercial income includes only payments to processors

seafood processed in Alaska. Note also that sport report and company owners' direct sales are based on estimates of total gross expenditures; commercial direct sales are based on wholesale value of product.
 Note: There are important differences between studies in the methodologies and definitions. Note in particular that sport

Outline of presentation

1. Comparison of report methodologies
2. Comparison of reports' estimates of economic importance
3. How accurate and reliable are the estimates?
4. What policy conclusions can we draw?

Total sales	\$1.6 billion	\$0.9 billion	\$2.8 billion
Direct sales	\$1.4 billion	\$0.7 billion	\$3.8 billion
	(from all sales) contribution Estimated	non-residents (from sales to Estimated impact	are to non-residents) (from all sales, almost all of which Estimated contribution (= impact)
	REPORT SPORT FISHING		REPORT COMMERCIAL FISHING

Comparison of Estimated Statewide Economic Importance in 2007

Comparison of Estimated Statewide Economic Importance in 2007

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	SPORT FISHING REPORT		COMMERCIAL FISHING REPORT
	Estimated contribution (from all sales)	Estimated impact (from sales to non-residents)	Estimated contribution (= impact) (from all sales, almost all of which are to non-residents)
Direct sales	\$1.4 billion	\$0.7 billion	\$3.6 billion
Total sales	\$1.6 billion	\$0.9 billion	\$5.8 billion
Total income	\$.54 billion	\$.32 billion	\$1.75 billion
Total jobs	15,879	9,437	78,519

Note: There are important differences between studies in the methodologies and definitions. Note in particular that sport direct sales are based on estimates of total angler expenditures; commercial direct sales are based on wholesale value of seafood processed in Alaska. Note also that port income includes payment to both labor and company owners; Commercial income includes only payments to labor.

Sources: Sport fishing report: Executive Summary, page 10; Commercial fishing report: Figures 36, 37, 38, 39

Conclusions: Statewide Economic Importance

- Both the sport fishing and commercial fishing industries are large and important industries to Alaska
- If we assume that both studies estimates are correct, and that expenditures by residents don't bring new money into Alaska, then for all fisheries statewide:
 - Commercial fishing has about three times the economic contribution of sport fishing
 - Commercial fishing has about six times the economic impact of sport fishing
 - These conclusions are highly approximate and depend on numerous assumptions!!!!

The studies do not tell us what share of the income and jobs created by

An important caveat!!!

An important caveat!!!

The studies do not tell us what share of the income and jobs created by sport fishing and commercial fishing go to Alaska residents!

- These conclusions are highly approximate and depend on
- Many of the jobs in commercial fish harvesting and processing are held by non-residents
- Many of the jobs in sport fish guiding and tourism services (seasonal hotels, restaurants, etc.) are held by non-residents
- But doesn't the Sport Fishing study distinguish between residents and non-residents?
- In who spends the money: YES
- In who gets the money: NO

Conclusions: Statewide Economic Importance

What about the economic importance of Cook Inlet fisheries?

- We can't compare the reports
- The commercial report didn't estimate the economic importance of Cook Inlet fisheries

Direct sales	\$135 million	\$135 million	first wholesale value **
	(all sales)	residents	\$103 million in
	contribution	(sales to non-	are to non-residents)
	economic	economic impact	(all sales, most of which
	sales driving	sales driving	contribution & impact
			sales driving economic
	REPORT		(ADFC data)
	SPORT FISHING		

Estimated Direct Sales in the Cook Inlet Region* in 2001
 something we can compare:

Something we can compare:
Estimated Direct Sales in the Cook Inlet Region* in 2007

	SPORT FISHING REPORT		(ADFG data)
	Sales driving economic contribution (all sales)	Sales driving economic impact (sales to non- residents)	Sales driving economic contribution & impact (all sales, most of which are to non-residents)
Direct sales	\$732 million	\$275 million	\$163 million in first wholesale value**

*Note: The geographic definitions differ between the sport fishing and commercial fishing reports, as noted in Slide 17. For the sport fishing report, the direct sales are all sales which occurred in the Cook Inlet region (which includes Anchorage)—not just those attributable to fishing which occurs in the Cook Inlet region. Thus the figures shown may overstate sales attributable to Cook Inlet sport fisheries. For the commercial fishing report, the figure shown is the first wholesale value of production which occurred in the Cook Inlet region (defined as Upper and Lower Cook Inlet).

**Source is annual Commercial Operator Annual Reports to ADFG. Wholesale value by species group: Salmon \$77 million; Halibut \$51 million; Groundfish \$33 million; Shellfish & Herring \$1 million.

Conclusions: Economic Importance of Cook Inlet Fisheries

- Both the sport fishing and commercial fishing industries are large and important industries in the Cook Inlet Region
- If we assume that the Sport Fishing Report's estimates of angler expenditures for Cook Inlet fisheries are correct, then:
 - The economic contribution of sport fishing may have been as much as 4½ times that of commercial fishing
 - The economic impact of sport fishing may have been as much as about 50% greater than that for commercial fishing.
 - Both of these ratios may be overstated to the extent that economic impacts of sport fishing from other regions occur in the Cook Inlet region.
 - The economic impact of Cook Inlet sport fisheries is probably significantly less than their economic contribution, because about 2/3 of sales for Cook Inlet sport fisheries are to residents—which bring less new money into the economy than sales to residents.
 - If all Cook Inlet sport fisheries disappeared, those residents would still spend a lot of that money in Alaska, in other ways.
 - These conclusions are highly approximate and depend on numerous assumptions!!!!

Outline of presentation

Outline of presentation

assumptions!!!!

- These conclusions are highly approximate and depend on numerous

1. Comparison of report methodologies

2. Comparison of reports' estimates of economic importance

3. How accurate and reliable are the estimates?

4. What policy conclusions can we draw?

- The economic impact of Cook Inlet sport fisheries is probably significantly greater than that for commercial fishing.

- Both of these ratios may be overstated to the extent that economic impacts of sport fishing from other regions occur in the Cook Inlet region.

- The economic impact of sport fishing may have been as much as about 20% greater than that of commercial fishing.

- The economic contribution of sport fishing may have been as much as 4% for Cook Inlet fisheries are correct, then:

- If we assume that the Sport Fishing Report's estimates of angler expenditures are correct, then:

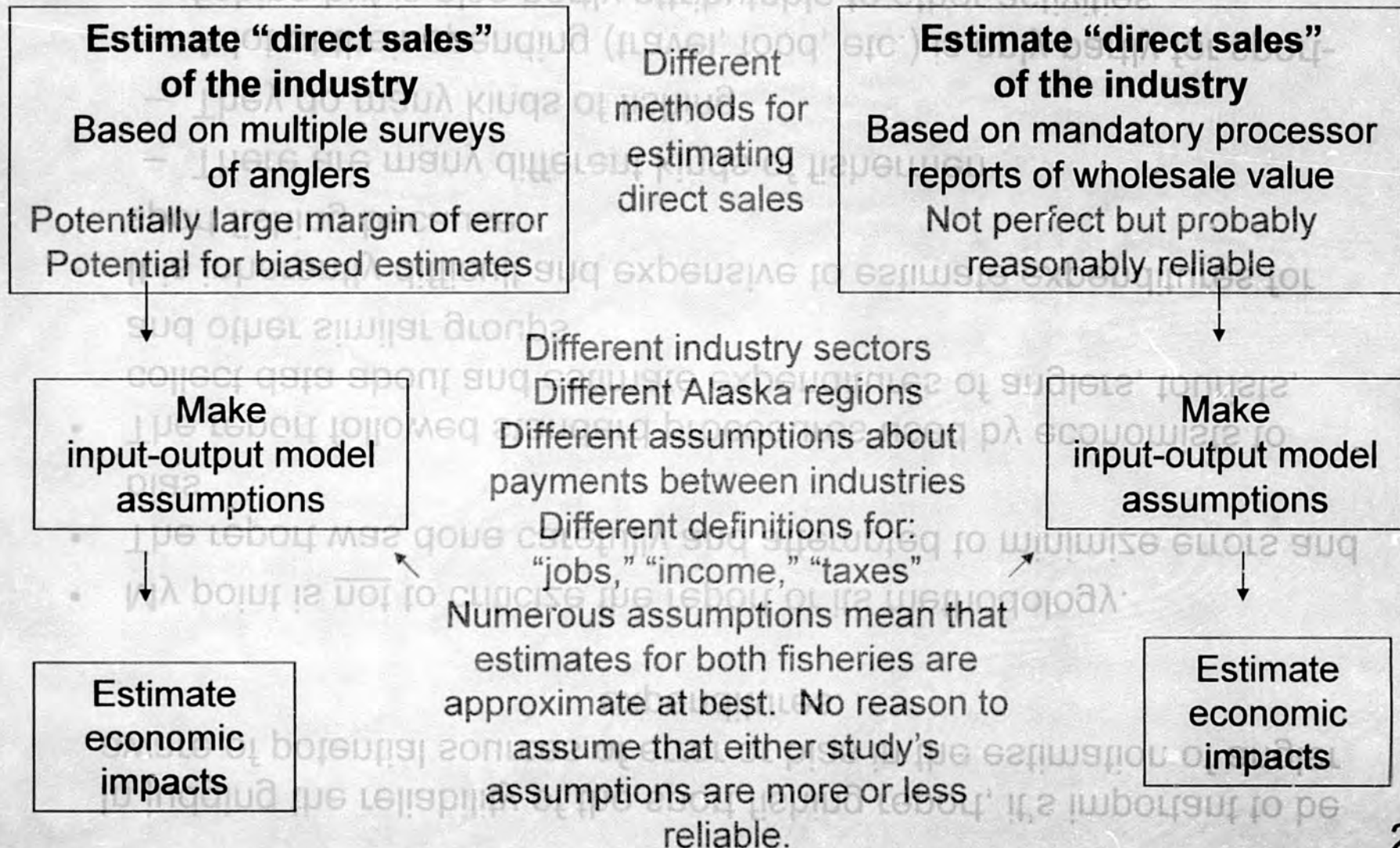
- Both the sport fishing and commercial fishing industries are large and important

Conclusions: Economic Importance of Cook Inlet Fisheries

How accurate and reliable are the estimates???

SPORT FISHING REPORT

COMMERCIAL FISHING REPORT



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In judging the reliability of the sport fishing report, it's important to be aware of potential sources of error or bias in the estimation of angler expenditures.

- My point is not to criticize the report or its methodology.
- The report was done carefully and attempted to minimize errors and bias
- The report followed standard procedures used by economists to collect data about and estimate expenditures of anglers, tourists, and other similar groups
- It is inherently difficult and expensive to estimate expenditures for sport fishing because:
 - There are many different kinds of fishermen
 - They do many kinds of fishing
 - A lot of their spending (travel, food, etc.) is only partly for sport-fishing but is also partly attributable to other activities
 - Not everyone answers surveys
 - People may not answer surveys accurately

How the sport fishing report estimated angler expenditures

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Step	Selected potential sources of error or bias
Sent surveys to samples of resident and non-resident anglers	Samples may not be representative Anglers who returned surveys may not be representative
Used survey results to estimate <u>average trip-related expenditures per angler day</u> , by residency, region, type of water fished, and use of guides Used survey results to estimate <u>average annual expenditures for equipment and angling-related real estate per licensed angler</u>	Anglers may not have answered the questions accurately Only asked about one trip per angler Difficult to accurately attribute how much of certain kinds of expenditures (travel, cars, etc.) are for sport-fishing
Estimated annual angler days based on the annual Statewide Harvest Survey of anglers.	Samples may not be representative Anglers who returned surveys may not be representative
Estimated expenditures as (Angler days x Average trip expenditure per day) + (Licensed anglers x Average equipment & RE expenditure per year)	

Note: Details of methodology are very complex and can only be understood by reading the report carefully!

Examples of survey questions (from resident survey) . . .

14. When was the last time you went sportfishing in Alaska between JULY 1st AND OCTOBER 31st, 2007?

(Check one)

☐ July

☐ August

☐ September

☐ October

☐ I did not fish between July 1st and Oct 31st (Skip to section C, page 6)

15. Fishing trips often include time for fishing, travel and non-fishing activities. How long was this fishing trip including fishing days, travel days and non-fishing days? Note that single-day trips do not need to take a whole day. For example, if the last time you went fishing JULY thru OCTOBER you only fished for a few hours after work, this would be counted as "1" day.

Total number of days involved in last fishing trip: _____

16. How many days did you actually fish during this last time that you went fishing in Alaska between JULY 1st AND OCTOBER 31st? (Count partial days of fishing as "1" day)

Number of days actually fished: _____

17. Would you have taken this trip even if you were unable to go fishing? (check one)

☐ Yes

☐ No

18. Was this trip primarily... (check one)

☐ rod & reel sportfishing

☐ dipnetting (personal use)

☐ shellfish fishing

19. Was this trip primarily... (check one)

☐ in freshwater

☐ in saltwater

☐ in both freshwater & saltwater