

AK LEGISLATURE SPECIAL COMMITTEE FILES SCOMM 156 3328

Table 61 presents a summary of the average spending that took place in the Cook Inlet for the major expenditure categories. Trip and package spending is based on total spending in the region and is averaged across all days of fishing that took place in the region, regardless of where individual resident anglers lived or fished. Due to the durable nature of equipment and its use across many trips, equipment and real estate expenditures are shown as the average spent in the region across all resident and nonresident anglers in Alaska on an annual basis. Overall, anglers spent an average of \$244.98 in the Cook Inlet per day of fishing for all trip and package related purchases (fuel, groceries, bait, lodging, restaurants, etc.). The average angler in Alaska spent \$896.62 per year in the Cook Inlet subregion on fishing and related equipment and real estate (rods, reels, boats, motors, clothing, maintenance, etc.; Table 61).

Table 61.—Average expenditures in the Cook Inlet region made by Alaska resident and nonresident anglers, 2007*.

	Resident Anglers	Nonresident Anglers	All Anglers
	<i>\$ per angler-day</i>		
Trip Expenditures	\$161.97	\$326.78	\$225.86
Package Expenditures	NA**	\$49.34	\$19.13
Total trip spending	\$161.97	\$376.11	\$244.98
	<i>annual \$ per licensed angler</i>		
Equipment Expenditures	\$1,519.98	\$76.62	\$655.27
Real Estate Expenditures	\$225.20	\$252.16	\$241.35
Total equipment & real estate spending	\$1,745.18	\$328.78	\$896.62

*Estimates of average spending for detailed trip and equipment categories are presented in Appendix L.

**Package expenditures refer specifically to purchases of travel packages made by nonresidents prior to departing on their trip to Alaska.

As with total spending, nonresidents, on average, spent more per day on trip-related purchases in the Cook Inlet region than Alaska residents, (\$376.11 compared to \$161.97). Conversely, the average Alaska resident angler spent more in the Cook Inlet for equipment than the average nonresident (\$1,745.18 compared to \$328.78). The average resident and nonresident angler spent approximately the same amount in the region on real estate used for fishing (approximately \$225 to \$250 per year).

Anglers make a wide range of purchases to support their fishing activity including trip-related expenditures, fishing tackle and other equipment, and expenses related to real estate that they use for fishing. Trip-related expenses refer to spending for temporary or consumable goods and services that anglers make while on a particular fishing trip. These range from food and lodging to travel expenses (e.g., fuel or air taxis), groceries, bait, and derby tickets. The full list of trip items and the amount spent by resident and nonresidents in the Cook Inlet subregion is presented in Table 62.

Some nonresident anglers opt to pre-purchase a packaged fishing expedition from one of the many outfitters, guides and lodges in Alaska. Such packages typically offer a range of services for one price including transportation, guides, feed and lodging. The survey of nonresidents asked anglers to report spending for any packages that they may have purchased and to indicate which amenities were included in the package.

Equipment expenditures refer to a list of tackle and other items that are used only for fishing, plus other equipment that might be used in other pursuits in addition to fishing. The details of total spending in the Cook Inlet subregion for these items is listed in the bottom half of Table 62. The dollar figures represent total amounts spent on the fishing equipment and only that portion of multi-use equipment that anglers reported was used specifically for fishing.

The real estate spending in Table 62 shows the annual costs of construction and maintenance that anglers reported was associated with real estate that is used primarily for sportfishing purposes. These numbers do not include any spending that anglers may have made to purchase or lease real estate used for sportfishing. An effort was made in the survey to capture lease/purchase spending for real estate, but the information that was collected was deemed too unreliable to provide an accurate estimation of that spending and is not included here.

The detailed breakdown of total spending in all categories by resident and nonresident anglers in Table 62 shows the differences in their specific purchases. Overall, nonresidents spent more than residents on trip-related items, especially those categories associated with travel (e.g., guide fees, airfare and other travel, rentals, restaurant meals, lodging, gifts/souvenirs, etc.). Because most people purchase equipment closer to where they live, and vacationers typically do not buy a significant amount of equipment while traveling, it is not surprising that residents outspent nonresidents in every equipment category except the miscellaneous "other" equipment category.

Further breakdowns of trip and package spending for Cook Inlet region are presented in Table 63 which shows total spending by resident/nonresidents, guided/unguided, and by type of water fished. In this breakdown, the greatest amount of trip spending came from resident anglers fishing without guides in fresh water (\$58.7 million). However, due to the range of fishing opportunities in the region, their trip spending is nearly matched by nonresidents on guided fishing trips in fresh water (\$55.2 million), nonresidents on guided fishing trips in salt water (\$50.7 million) and nonresidents fishing in freshwater without a guide (\$45.7 million). The largest amount of package spending was by nonresidents fishing with guides in salt water (\$9.5 million) and freshwater (\$8.7 million).

The multi-purpose nature of many equipment items precludes a similarly detailed breakdown of equipment or real estate spending in the Cook Inlet subregion for this report. Additional detailed estimates of total and average spending are presented in Appendices I and J.

Table 62.—Detailed spending for sportfishing in Cook Inlet subregion, by residency, 2007.

	Resident	Nonresident	Total
Trip Expenditures			
Fuel	\$37,011,821	\$10,044,202	\$47,056,024
Guide	\$18,110,318	\$31,265,439	\$49,375,757
Air	\$1,812,166	\$21,302,467	\$23,114,633
Travel	\$589,157	\$3,030,195	\$3,619,352
Process	\$5,012,909	\$15,509,514	\$20,522,423
Rentals	\$1,478,512	\$18,137,545	\$19,616,056
Derby	\$647,639	\$243,895	\$891,534
Dock	\$4,901,916	\$1,062,002	\$5,963,918
Ice	\$2,099,702	\$696,683	\$2,796,385
Bait	\$2,870,067	\$1,104,778	\$3,974,845
Groceries	\$22,606,554	\$13,662,403	\$36,268,957
Meals	\$10,042,829	\$13,162,259	\$23,205,088
Lodging	\$12,216,060	\$17,774,950	\$29,991,010
Gifts	\$1,889,133	\$7,807,062	\$9,696,196
Amusements	\$1,946,515	\$2,497,644	\$4,444,159
Other	\$60,030	\$164,514	\$224,544
Sub-Total	\$123,295,328	\$157,465,551	\$280,760,879
Package Expenditures			
	NA*	\$23,774,541	\$23,774,541
Equipment Expenditures			
Rods, reels, & components	\$13,259,547	\$3,249,634	\$16,509,181
Fishing tackle	\$7,483,531	\$3,556,936	\$11,040,467
Tackle boxes	\$1,093,528	\$234,280	\$1,327,807
Depth finders, fish finders, etc.	\$5,551,575	\$13,401	\$5,564,976
Landing nets, dipnets & gillnets	\$2,482,010	\$196,128	\$2,678,138
Misc. fishing equip	\$2,584,018	\$868,690	\$3,452,707
Shellfish fishing equip	\$690,714	\$119,282	\$809,996
Fish mounting (taxidermy)	\$1,454,872	\$351,385	\$1,806,257
Books and magazines	\$827,718	\$302,202	\$1,129,920
Items to store/preserve fish	\$4,710,457	\$1,139,791	\$5,850,248
Coolers, fish boxes	\$1,864,918	\$983,159	\$2,848,078
Clothing	\$3,920,066	\$1,347,794	\$5,267,860
Boots, shoes, waders	\$3,591,748	\$1,150,357	\$4,742,105
Life jackets, survival suits	\$2,136,044	\$46,466	\$2,182,509
Boats, canoes, other watercraft	\$80,377,485	\$2,018,037	\$82,395,521
Boat motors	\$22,853,409	\$29,280	\$22,882,689
Trailers, hitches, and acc	\$4,217,105	\$123,647	\$4,340,753
Other boat parts and acc	\$7,662,191	\$160,244	\$7,822,435
Bear spray, bug spray, etc	\$704,412	\$287,722	\$992,134
Firearms	\$3,417,279	\$58,334	\$3,475,613
Cameras, binoculars	\$3,488,315	\$525,085	\$4,013,401
Tents, backpacks, sleeping bags	\$2,472,341	\$209,499	\$2,681,840
Camping trailer	\$23,708,102	\$13,788	\$23,721,889
Other camping equip	\$1,554,141	\$176,261	\$1,730,403
Vehicles (trucks, SUVs, etc)	\$53,115,779	\$3,550,618	\$56,666,397
Airplanes and related equipment	\$2,697,880	\$765,104	\$3,462,984
ATVs, snowmachines	\$17,109,683	\$0	\$17,109,683
Boat/camper registrations	\$2,389,419	\$138,116	\$2,527,535
Vehicle, boat or airplane repair	\$14,084,627	\$332,897	\$14,417,524
Other	\$207,861	\$3,939	\$211,800
Sub-Total	\$291,710,774	\$21,952,076	\$313,662,850
Real Estate Expenditures			
Real estate repairs	\$6,221,360	\$9,036,749	\$15,258,109
Real estate construction	\$36,711,001	\$62,801,595	\$99,512,596
Sub-Total	\$42,932,362	\$71,838,343	\$114,770,705
TOTAL SPENDING	\$457,938,464	\$275,030,511	\$732,968,975

*Package expenditures refer specifically to purchases of travel packages made by nonresidents prior to departing on their trip to Alaska.

Table 63.—Detailed total TRIP and PACKAGE spending in the Cook Inlet subregion, by residency, use of guides, and type of water fished.

	RESIDENT		NONRESIDENT		ALL ANGLERS
	Guided	Unguided	Guided	Unguided	
FRESHWATER ANGLERS					
Trip Expenditures					
Fuel and oil	\$2,173,330	\$21,901,576	\$3,186,123	\$3,263,385	\$30,524,413
Guide and charter fees	\$9,775,368	\$491,026	\$15,117,765	\$1,497,359	\$26,881,518
Airfare to and from Alaska	\$676,488	\$641,443	\$6,751,271	\$9,165,356	\$17,234,558
Travel within Alaska	\$324,265	\$196,692	\$1,359,212	\$1,224,923	\$3,105,092
Fish processing & shipping	\$211,402	\$2,416,922	\$4,186,148	\$4,389,265	\$11,203,737
Rentals (boats, equipment, etc.)	\$0	\$984,794	\$5,601,019	\$6,829,749	\$13,415,562
Derby tickets	\$19,034	\$265,911	\$44,050	\$40,009	\$369,003
Boat launch and dock fees	\$14,288	\$2,999,774	\$39,839	\$487,024	\$3,540,924
Ice	\$67,606	\$1,443,246	\$141,983	\$391,344	\$2,044,179
Bait (natural bait only)	\$14,266	\$1,415,536	\$141,380	\$400,092	\$1,971,273
Groceries bought in stores	\$1,845,644	\$14,369,144	\$3,306,773	\$6,744,856	\$26,266,417
Restaurants, bars, and take-out	\$1,878,700	\$5,004,739	\$4,354,029	\$4,436,963	\$15,674,430
Overnight accommodations	\$3,883,292	\$4,921,116	\$7,187,303	\$3,402,945	\$19,394,656
Souvenirs and gifts	\$321,053	\$695,238	\$2,594,590	\$2,752,956	\$6,363,838
Other entertainment	\$554,469	\$885,321	\$1,182,918	\$671,368	\$3,294,077
Other	\$0	\$46,262	\$59,683	\$6,930	\$112,875
Sub-Total	\$21,759,204	\$58,678,740	\$55,254,085	\$45,704,524	\$181,396,553
Package Expenditures	NA*	NA**	\$8,680,122	\$5,027,281	\$13,707,403
SALTWATER ANGLERS					
Trip Expenditures					
Fuel and oil	\$1,555,961	\$11,380,954	\$2,758,126	\$836,568	\$16,531,610
Guide and charter fees	\$7,712,767	\$131,158	\$14,444,769	\$205,546	\$22,494,239
Airfare to and from Alaska	\$494,235	\$0	\$4,506,611	\$879,229	\$5,880,075
Travel within Alaska	\$21,360	\$46,840	\$386,468	\$59,592	\$514,260
Fish processing & shipping	\$1,021,272	\$1,363,313	\$6,251,152	\$682,949	\$9,318,686
Rentals (boats, equipment, etc.)	\$95,175	\$398,542	\$5,416,541	\$290,235	\$6,200,494
Derby tickets	\$50,954	\$311,741	\$143,625	\$16,211	\$522,531
Boat launch and dock fees	\$13,165	\$1,874,689	\$55,453	\$479,686	\$2,422,993
Ice	\$77,690	\$511,160	\$132,132	\$31,224	\$752,206
Bait (natural bait only)	\$8,838	\$1,431,427	\$138,026	\$425,280	\$2,003,571
Groceries bought in stores	\$1,565,405	\$4,826,360	\$2,828,945	\$781,830	\$10,002,539
Restaurants, bars, and take-out	\$1,733,160	\$1,426,230	\$3,975,969	\$395,298	\$7,530,657
Overnight accommodations	\$2,261,977	\$1,149,674	\$6,839,466	\$345,236	\$10,596,353
Souvenirs and gifts	\$624,221	\$248,621	\$2,220,291	\$239,225	\$3,332,358
Other entertainment	\$223,875	\$282,850	\$522,260	\$121,097	\$1,150,083
Other	\$0	\$13,767	\$97,902	\$0	\$111,669
Sub-Total	\$17,460,056	\$25,397,328	\$50,717,735	\$5,789,207	\$99,364,325
Package Expenditures	NA*	NA*	\$9,452,136	\$615,002	\$10,067,138
ALL ANGLERS					
Trip Expenditures					
Fuel and oil	\$3,729,291	\$33,282,530	\$5,944,250	\$4,099,953	\$47,056,024
Guide and charter fees	\$17,488,135	\$622,183	\$29,562,533	\$1,702,905	\$49,375,757
Airfare to and from Alaska	\$1,170,723	\$641,443	\$11,257,882	\$10,044,585	\$23,114,633
Travel within Alaska	\$345,625	\$243,532	\$1,745,680	\$1,284,516	\$3,619,352
Fish processing & shipping	\$1,232,673	\$3,780,235	\$10,437,300	\$5,072,214	\$20,522,423
Rentals (boats, equipment, etc.)	\$95,175	\$1,383,337	\$11,017,560	\$7,119,985	\$19,616,056
Derby tickets	\$69,987	\$577,652	\$187,675	\$56,220	\$891,534
Boat launch and dock fees	\$27,453	\$4,874,463	\$95,292	\$966,709	\$5,963,918
Ice	\$145,296	\$1,954,406	\$274,115	\$422,568	\$2,796,385
Bait (natural bait only)	\$23,104	\$2,846,963	\$279,406	\$825,372	\$3,974,845
Groceries bought in stores	\$3,411,050	\$19,195,504	\$6,135,717	\$7,526,686	\$36,268,957
Restaurants, bars, and take-out	\$3,611,859	\$6,430,970	\$8,329,998	\$4,832,261	\$23,205,088
Overnight accommodations	\$6,145,270	\$6,070,790	\$14,026,769	\$3,748,181	\$29,991,010
Souvenirs and gifts	\$945,274	\$943,859	\$4,814,882	\$2,992,181	\$9,696,196
Other entertainment	\$778,344	\$1,168,171	\$1,705,178	\$792,466	\$4,444,159
Other	\$0	\$60,030	\$157,584	\$6,930	\$224,544
Sub-Total	\$39,219,260	\$84,076,068	\$105,971,820	\$51,493,731	\$280,760,879
Package Expenditures	NA*	NA*	\$18,132,258	\$5,642,283	\$23,774,541

Economic Contributions

Expenditures by anglers generate additional economic benefits throughout the Cook Inlet subregion. Multiplier effects have been estimated separately for trip spending and package spending, and for equipment and real estate spending combined. All economic contributions have been estimated separately for residents and nonresidents. The direct effects that are shown in the following tables reflect the economic activity associated with angler spending captured within the regional economy (i.e., consumer retail spending less the value of goods imported from outside of the regional economy). For that reason, the direct output values in the tables that follow are likely to be less than the reported angler spending for any specific category.

The \$733.0 million in spending by anglers in the Cook Inlet subregion in 2007 generated \$171.5 million of income to 5,282 full and part time employees and proprietors who worked in the Cook Inlet businesses whose products were purchased by anglers (Table 64). Spending by nonresidents accounted for 2,583 of the jobs and \$87.3 million of income, while resident spending in the subregion supported 2,699 jobs and \$84.2 million of income. In addition to the economic activity directly attributable to spending by anglers are the multiplier effects (indirect and induced effects) of that consumer spending. The indirect effect results from the increased economic activity among businesses that supply those businesses selling directly to the anglers. For example, the guide that sells directly to anglers, in turn, stimulates additional activity among the businesses that supply the guide's operations. The induced effect is the economic activity produced by household spending of income earned by workers in those businesses that are impacted by both the direct and indirect effects. Including both direct and multiplier effects, the \$733.0 million of spending in the region by anglers produced \$278.8 million of income and supported 8,056 full and part-time jobs (Table 64).

Table 64.-Cook Inlet subregion economic contributions of ALL spending for sportfishing, by residency, 2007.

	Resident Anglers	Nonresident Anglers	All Anglers
Direct effects			
Output	\$246,005,477	\$242,415,467	\$488,420,944
Income	\$84,239,661	\$87,274,061	\$171,513,722
Employment (jobs)	2,699	2,583	5,282
Multiplier effects			
Output	\$167,282,135	\$172,186,759	\$339,468,894
Income	\$52,410,475	\$54,850,355	\$107,260,830
Employment (jobs)	1,311	1,463	2,774
Total effects			
Output	\$413,287,612	\$414,602,226	\$827,889,838
Income	\$136,650,136	\$142,124,416	\$278,774,552
Employment (jobs)	4,010	4,046	8,056

The relationship between the direct effect (i.e. directly attributable to the spending by anglers) and the total economic activity that it creates is commonly presented in the form of a multiplier. Typically, smaller regional economies will exhibit smaller multipliers due to the reduced opportunities to retain economic activity within the region. In the case of Cook Inlet sportfishing, the output multiplier of 1.70 (total effect divided by direct effect) means every dollar of activity stimulated by angler spending creates an additional \$0.70 of economic activity

elsewhere in the regional economy (compared to a statewide output multiplier of 1.62). The income and employment multipliers are 1.63 and 1.53, respectively. This means that for every dollar of income paid to workers in businesses that sell directly to anglers and for every job in a business that sells directly to anglers there is an additional \$0.63 of income and 0.53 additional jobs in other businesses throughout the region that are supported by angler spending. Generally, the economic multipliers for any given sector in a subregion will be smaller than the multiplier for that same sector in the statewide economy because there are fewer businesses to capture and re-circulate the original dollars that are spent. However, different sectors have different multipliers and in the case of anglers' spending in the Cook Inlet their mix of purchases includes more of those sectors with higher multipliers resulting in an overall multiplier that is slightly larger than the statewide multiplier.

Employment effects are of particular importance to the state and local economy. The jobs supported by angler expenditures are shown in Table 65 categorized by the industry in which the jobs occur. The jobs directly supported by angler spending largely reflect the types of expenditures made by anglers – trip expenditures for food, bait, lodging and guide services, maintenance of real estate used for sportfishing, and retail purchases of fishing and related equipment. Sector 11 in the following table includes farming and commercial fishing and hunting and is directly affected primarily through anglers' purchases of groceries and bait. The broader distribution of jobs indirectly supported by angler spending through the multiplier effect is the result of inter-industry trade flows and the expenditures of household income that comes from angler-supported jobs.

Table 65. Employment (jobs) directly and indirectly supported by angler expenditures in the Cook Inlet subregion, by industry in which the employment occurs, 2007.

NAICS Industry Categories	Direct Effects	Multiplier Effects	Total Effects
11 Agriculture, forestry, fishing & hunting	100	172	272
21 Mining	3	39	42
22 Utilities	-	21	21
23 Construction	645	32	676
31-33 Manufacturing	103	87	190
42 Wholesale trade	217	78	295
48-49 Transportation & warehousing	122	148	270
44-45 Retail trade	1,592	412	2,004
51 Information	-	55	55
52 Finance & insurance	-	102	102
53 Real estate & rental	252	234	486
54 Professional- scientific & technical services	-	215	215
55 Management of companies	-	45	45
56 Administrative & waste services	1	152	153
61 Educational services	-	37	37
62 Health & social services	-	320	320
71 Arts- entertainment & recreation (e.g., guides)	1,214	95	1,309
72 Accommodation & food services	868	246	1,114
81 Other services	136	188	324
92 Government and public administration	30	98	128
Total Employment Impact	5,282	2,773	8,056

Table 66 presents a breakdown by residency of the economic contributions that derive from anglers' spending on equipment and real estate (a subset of total spending) in the Cook Inlet subregion. Including the direct and multiplier effects, the \$313.7 million spent by anglers on equipment and \$114.8 million spent on real estate maintenance and construction for sportfishing (Table 60) supported 3,015 jobs and provided \$120.9 million of income. Equipment and real estate spending by residents supported 2,067 jobs and provided \$74.3 million of income in 2007 while nonresident angler spending supported 948 jobs and \$46.6 million of income (Table 66).

Table 66.—Cook Inlet Subregion economic contributions of expenditures for sportfishing EQUIPMENT and REAL ESTATE, by residency, 2007.

	Resident Anglers	Nonresident Anglers	All Anglers
Direct effects			
Output	\$127,153,461	\$79,645,976	\$206,799,437
Income	\$49,018,559	\$29,960,787	\$78,979,346
Employment (jobs)	1,400	511	1,911
Multiplier effects			
Output	\$78,501,170	\$50,475,633	\$128,976,803
Income	\$25,283,399	\$16,681,108	\$41,964,507
Employment (jobs)	666	437	1,104
Total effects			
Output	\$205,654,631	\$130,121,609	\$335,776,240
Income	\$74,301,958	\$46,641,895	\$120,943,853
Employment (jobs)	2,067	948	3,015

Table 67 shows the economic contributions from spending on trips and packages, broken down by residency, use of guides, and type of water fished. The largest economic contribution came from nonresident anglers fishing in fresh water with the services of a guide. Including the direct and multiplier effects, their spending supported 1,148 jobs that provided \$34.4 million of income. That represents 14.3% and 12.4% of all jobs and income supported by sportfishing anglers in the region, respectively.

Additional detailed estimates of the industry impacts in Cook Inlet subregion due to angler spending are presented in Appendices K and L.

8,056	2,773	5,283	Total Employment Impact
128	98	20	92 Government and public administration
324	188	136	81 Other services
1,114	345	868	73 Accommodation & food services
1,309	95	1,214	71 Arts, entertainment & recreation (e.g., guides)
150	95	50	62 Health & social services
37	37	0	61 Educational services
153	1	152	56 Administrative & waste services
153	1	152	55 Management of companies

Table 67.—Cook Inlet subregion economic contributions of combined TRIP-RELATED and PACKAGE spending for sportfishing, by residency, use of guides, and type of water.

	RESIDENT		NONRESIDENT		TOTAL*		ALL ANGLERS
	Guided	Unguided	Guided	Unguided	Resident	Nonresident	
FRESHWATER ANGLERS							
Direct effects							
Output	\$21,062,669	\$56,284,227	\$58,391,376	\$42,992,979	\$77,346,896	\$101,384,355	\$178,731,251
Income	\$6,524,363	\$16,313,969	\$20,328,757	\$15,900,343	\$22,838,332	\$36,229,100	\$59,067,432
Employment	296	529	780	484	825	1,264	2,089
Multiplier effects							
Output	\$15,405,485	\$42,545,387	\$44,212,275	\$32,886,849	\$57,950,872	\$77,099,124	\$135,049,996
Income	\$5,005,585	\$12,748,328	\$14,113,443	\$10,083,634	\$17,753,913	\$24,197,077	\$41,950,990
Employment	121	298	369	273	419	642	1,061
Total effects							
Output	\$36,468,154	\$98,829,614	\$102,603,651	\$75,879,828	\$135,297,768	\$178,483,479	\$313,781,247
Income	\$11,529,948	\$29,062,297	\$34,442,200	\$25,983,977	\$40,592,245	\$60,426,177	\$101,018,422
Employment	417	827	1,148	757	1,244	1,905	3,149
SALTWATER ANGLERS							
Direct effects							
Output	\$16,816,852	\$24,688,268	\$55,784,453	\$5,600,683	\$41,505,120	\$61,385,136	\$102,890,256
Income	\$5,285,729	\$7,097,041	\$19,269,061	\$1,815,113	\$12,382,770	\$21,084,174	\$33,466,944
Employment	237	236	742	67	473	809	1,282
Multiplier effects							
Output	\$11,468,710	\$19,361,383	\$40,247,611	\$4,364,391	\$30,830,093	\$44,612,002	\$75,442,095
Income	\$3,626,328	\$5,746,835	\$12,643,368	\$1,328,802	\$9,373,163	\$13,972,170	\$23,345,333
Employment	94	132	349	35	226	384	610
Total effects							
Output	\$28,285,562	\$44,049,651	\$96,032,064	\$9,965,074	\$72,335,213	\$105,997,138	\$178,332,351
Income	\$8,912,057	\$12,843,876	\$31,912,429	\$3,143,915	\$21,755,933	\$35,056,344	\$56,812,277
Employment	332	368	1,091	102	700	1,193	1,892
ALL ANGLERS							
Direct effects							
Output	\$37,879,521	\$80,972,495	\$114,175,829	\$48,593,662	\$118,852,016	\$162,769,491	\$281,621,507
Income	\$11,810,092	\$23,411,010	\$39,597,818	\$17,715,456	\$35,221,102	\$57,313,274	\$92,534,376
Employment	533	765	1,522	551	1,298	2,073	3,371
Multiplier effects							
Output	\$26,874,195	\$61,906,770	\$84,459,886	\$37,251,240	\$88,780,965	\$121,711,126	\$210,492,091
Income	\$8,631,913	\$18,495,163	\$26,756,811	\$11,412,436	\$27,127,076	\$38,169,247	\$65,296,323
Employment	216	430	717	308	645	1,026	1,671
Total effects							
Output	\$64,753,716	\$142,879,265	\$198,635,715	\$85,844,902	\$207,632,981	\$284,480,617	\$492,113,598
Income	\$20,442,005	\$41,906,173	\$66,354,629	\$29,127,892	\$62,348,178	\$95,482,521	\$157,830,699
Employment	749	1,195	2,239	859	1,943	3,098	5,042

* Total guided and unguided trip related and package spending.

The economic activity directly and indirectly generated in the Cook Inlet subregion by sportfishing also produces tax revenues for local, state and federal governments. The IMPLAN model produces generalized estimates of tax revenues that are based on existing statewide ratios of output, income and employment to all tax revenues. It is estimated that sportfishing expenditures in the Cook Inlet subregion in 2007 provided \$55.3 million and \$56.3 million of state/local and federal tax revenues, respectively (Table 68). Approximately forty percent of sportfishing tax revenues (50.0%) were the result of spending by nonresident anglers.

Table 68.—Tax revenues generated in the Cook Inlet subregion from the economic contributions of sportfishing, 2007.

	State and Local Tax Revenues	Federal Tax Revenues	Total tax Revenues
RESIDENT ANGLERS			
Trip Expenditures (non-package)	\$17,542,003	\$15,263,172	\$32,805,175
Package Expenditures	\$0	\$0	\$0
Equipment & Real Estate Expenditures	\$17,647,441	\$16,644,408	\$34,291,849
Subtotal	\$35,189,444	\$31,907,580	\$67,097,024
NONRESIDENT ANGLERS			
Trip Expenditures (non-package)	\$11,961,038	\$12,378,025	\$24,339,063
Package Expenditures	\$1,748,741	\$2,070,565	\$3,819,306
Equipment & Real Estate Expenditures	\$6,382,147	\$9,904,980	\$16,287,127
Subtotal	\$20,091,926	\$24,353,570	\$44,445,496
ALL ANGLERS			
Trip Expenditures (non-package)	\$29,503,041	\$27,641,197	\$57,144,237
Package Expenditures	\$1,748,741	\$2,070,565	\$3,819,306
Equipment & Real Estate Expenditures	\$24,029,587	\$26,549,388	\$50,578,976
Total	\$55,281,369	\$56,261,150	\$111,542,520

SOUTHEAST MARINE SUBREGION

This section presents the detailed expenditures and economic contributions for saltwater sportfishing in the Southeast Region. Total fishing activity in this region was described in an earlier section. This section focuses specifically on saltwater fishing in the Southeast region due to its importance to sportfishing in Alaska. The spending and contribution totals in the following Southeast Marine subregion tables do not include the cost of fishing licenses and stamps. This expenditure is not included in the subsequent subregional tables because licenses and stamps are purchased from state government and cannot be ascribed to a particular region. Also, because fishing equipment can be used for both freshwater and saltwater fishing, equipment expenditures cannot be allocated solely to saltwater and are not included in the following tables. Total fishing expenditures and economic contributions therefore are not directly comparable to other regions.

Angler Days

By definition, all of the fishing in this subregion occurred in salt water. Of the total 435,338 days of fishing in Southeast marine waters in 2007, more than one-half (255,465) were taken by nonresidents. Most angler-days fished in the subregion (62.7%) were unguided, but among nonresidents over half of all saltwater days fished (57.7%) were guided days (Table 69). Due to a relatively small sample size, the exact proportion of guided days fished by resident anglers in Southeast marine waters is unknown, but it appears to be relatively small compared to nonresidents.

Table 69.—Total angler days, by residency and guided/unguided for Southeast marine waters*, 2007.

	RESIDENT		NONRESIDENT		ALL ANGLERS	
	Angler-Days	%	Angler-Days	%	Angler-Days	%
Saltwater						
Guided			147,332	57.7%	162,185	37.3%
Unguided			108,133	42.3%	273,153	62.7%
Total	179,873	100.0%	255,465	100.0%	435,338	100.0%

Shaded cells represent estimates that are not reported due to small sample size.

Source: 2007 Statewide Harvest Survey, Alaska Department of Fish and Game.

*Totals reported here do not exactly match published statewide and regional totals from the 2007 SWHS due to the fact that it is not possible to identify the water type or guided/unguided status of some SWHS survey responses. The totals reported in this table reflect the summary of all days fished within a region that could be assigned to a specific residency, water type, and guided/unguided category. Approximately 4,177 days fished (0.16% of 2.5 million days) could not be assigned to a strata category and thus were not included in these totals.

Expenditures

Where anglers spend their money is not necessarily tied to where they fish or where they live. In actuality, an angler on a one-day or multi-day fishing trip might start from their home, purchase fuel, food, or other supplies on the way to their destination, and then make additional purchases such as bait, ice, or guide services, closer to where they fish. The following expenditure tables take this into account by reporting total trip expenditures associated with Southeast marine fishing made by all Alaska resident anglers, regardless of where they fished or the region where

they live, and by all nonresident anglers who live outside of Alaska regardless of where they fished. In addition to fishing more days, nonresidents spent considerably more than residents for sportfishing in Southeast marine waters. Because equipment and real estate are not included in estimates of spending by type of water and pre-purchased package spending relates only to nonresidents, all resident angler spending is associated with trip-related expenditures (\$21.3 million). Nonresident anglers split their spending between pre-purchased package trips (\$36.6 million) and non-package trip expenditures (\$73.7 million; Table 70).

Table 70.—Total spending for sportfishing, by expenditure category and residency for Southeast marine waters, 2007.

Expenditures	Resident Anglers		Nonresident Anglers		All Anglers	
	Spending	%	Spending	%	Spending	%
Trip	\$21,268,271	100.0%	\$73,714,297	66.8%	\$94,982,568	72.2%
Package	NA**	NA**	\$36,630,880	33.2%	\$36,630,880	27.8%
Equipment	NA*	NA*	NA*	NA*	NA*	NA*
Real Estate	NA*	NA*	NA*	NA*	NA*	NA*
Total	\$21,268,271	100.0%	\$110,345,177	100.0%	\$131,613,448	100.0%

*Equipment and real estate expenditures cannot be ascribed to a particular type of water.

**Package expenditures refer specifically to travel packages purchased by nonresidents prior to departing on their trip to Alaska.

Table 71 presents a summary of the average trip spending that took place in the Southeast region for saltwater fishing for the major expenditure categories. Trip and package spending is based on total spending in the region and is averaged across all days of saltwater fishing that took place in the region, regardless of where individual resident anglers lived or fished. By definition, this subregion includes only saltwater fishing. As a result, no equipment or real estate expenditures are included because multi-purpose, multi-use spending is not assigned to fishing activity by type of water. Overall, anglers fishing Southeast marine waters spent an average of \$302.32 per day of fishing on trip and package expenditures. Alaska residents fishing saltwater in the Southeast an average of \$118.24 in the region, compared to \$431.94 spent in the region by the average nonresident (Table 71).

Table 71.—Average TRIP spending per angler-day for Southeast marine waters, 2007*.

	Resident Anglers	Nonresident Anglers	All Anglers
	\$ per angler-day		
Trip Expenditures	\$118.24	\$288.55	\$218.18
Package Expenditures	NA**	\$143.39	\$84.14
Total trip spending	\$118.24	\$431.94	\$302.32
annual \$ per licensed angler			
Equipment Expenditures	NA***	NA***	NA***
Real Estate Expenditures	NA***	NA***	NA***

*Estimates of average spending for detailed trip and equipment categories are presented in Appendix L.

**Package expenditures refer specifically to purchases of travel packages made by nonresidents prior to departing on their trip to Alaska.

***Equipment and real estate expenditures cannot be ascribed to a particular type of water.

Anglers make a wide range of purchases to support their fishing activity including, trip-related expenditures and pre-purchased packages. Trip-related expenses refer to spending for temporary or consumable goods and services that anglers make while on a particular fishing trip. These range from food and lodging to travel expenses (e.g., fuel or air taxis), groceries, bait, and derby tickets. The full list of trip-related expenditure items and the amount spent by residents and nonresidents for Southeast marine sportfishing in 2007 is presented in Table 72.

Some nonresident anglers opt to pre-purchase a packaged fishing expedition from one of the many outfitters, guides and lodges in Alaska. Such packages typically offer a range of services for one price including transportation, guides, food and lodging. The survey of nonresidents asked anglers to report spending for any packages that they may have purchased and to indicate which amenities were included in the package.

A further breakdown of trip and package spending is presented in Table 72 which shows total spending by resident/nonresidents, and by guided/unguided fishing. No reliable estimates are available for resident anglers who took guided saltwater fishing trips in the region due to the small number of observations resulting from the angler expenditure survey. In this breakdown, the greatest amount of trip spending came from nonresident anglers on guided trips (\$52.4 million). Those anglers also spent the most on packages (\$32.6 million). Nonresident guided anglers accounted for 55.2% of all saltwater trip spending in the region in 2007 and 89.1% of all package spending. Similar detailed breakdowns of angler spending on a "per day" basis are provided in Appendix L.

Table 72.—Detailed total TRIP and PACKAGE spending by anglers fishing saltwater in Southeast Alaska, by residency and use of guides, 2007.

	RESIDENT		NONRESIDENT		ALL ANGLERS
	Guided*	Unguided	Guided	Unguided	
SALTWATER ANGLERS					
Trip Expenditures					
Fuel and oil		\$7,232,882	\$1,532,460	\$4,125,662	\$13,198,038
Guide and charter fees		\$84,305	\$21,505,868	\$305,377	\$23,761,150
Airfare to and from Alaska		\$0	\$9,469,274	\$4,852,526	\$14,321,800
Travel within Alaska		\$42,165	\$1,780,545	\$750,283	\$2,572,992
Fish processing & shipping		\$1,265,507	\$5,191,906	\$701,845	\$7,667,809
Rentals (boats, equipment, etc.)		\$58,241	\$740,166	\$1,005,864	\$1,871,986
Derby tickets		\$746,192	\$47,683	\$37,464	\$831,340
Boat launch and dock fees		\$4,126,563	\$2,686	\$493,202	\$4,647,823
Ice		\$223,702	\$21,528	\$67,288	\$312,518
Bait (natural bait only)		\$1,482,050	\$47,906	\$465,636	\$2,006,804
Groceries bought in stores		\$2,676,679	\$1,888,464	\$2,604,512	\$7,280,057
Restaurants, bars, and take-out		\$235,603	\$2,333,949	\$2,155,046	\$4,750,827
Overnight accommodations		\$104,796	\$4,109,380	\$2,393,836	\$6,608,012
Souvenirs and gifts		\$23,059	\$3,002,209	\$1,082,181	\$4,107,450
Other entertainment		\$44,412	\$537,568	\$254,262	\$836,243
Other		\$0	\$199,537	\$8,184	\$207,720
Total		\$18,346,157	\$52,411,128	\$21,303,169	\$94,982,568
Package Expenditures					
		NA	\$32,652,353	\$3,978,528	\$36,630,880

*estimates are not reported due to small sample size.

Economic Contributions

Expenditures by anglers generate additional economic benefits throughout the Southeast Alaska regional economy. Multiplier effects have been estimated separately for trip spending and package spending, and for equipment and real estate spending combined. All economic contributions have been estimated separately for residents and nonresidents. The direct effects that are shown in the following tables reflect the economic activity associated with angler spending on saltwater sportfishing captured within the regional economy (i.e. consumer retail spending less the value of goods imported from outside of the regional economy). For that reason, the direct output values in the tables that follow are likely to be less than the reported angler spending for any specific category.

Table 73 presents economic contributions from trip and package spending by residency for sportfishing in Southeast Alaska marine waters. Since it is generally not possible to ascribe sportfishing equipment and real estate spending to a particular water type, the following estimates of the economic contribution of sportfishing in Southeast marine waters do not include the economic contributions from equipment and real estate spending occurring in the region. The economic contribution estimates shown in Table 73 represent only the trip and package expenditure economic effects, not a full representation of economic activity in the region from saltwater fishing. The \$131.6 million spent in the region by saltwater anglers generated \$37.5 million of income to 1,419 full and part time workers and proprietors who worked in the Southeast businesses that sold directly to those anglers. Spending by nonresidents accounted for 1,194 of the jobs and \$30.9 million of income, while resident saltwater sportfishing in Southeast Alaska accounted for 226 jobs and \$6.6 million in income (Table 73). Additional detailed estimates of the industry impacts in Southeast marine waters due to angler spending are presented in Appendices K and L.

Table 73.—Economic contributions of combined TRIP-RELATED and PACKAGE expenditures by anglers for sportfishing in Southeast marine waters, by residency, and guided/unguided, 2007.

	RESIDENT		NONRESIDENT		TOTAL*		ALL ANGLERS
	Guided**	Unguided	Guided	Unguided	Resident	Nonresident	
SALTWATER ANGLERS							
Direct effects							
Output		\$17,416,421	\$75,930,757	\$21,002,797	\$20,304,330	\$96,933,554	\$117,237,884
Income		\$5,641,068	\$24,148,749	\$6,817,503	\$6,556,676	\$30,966,252	\$37,522,928
Employment		192	953	241	226	1,194	1,419
Multiplier effects							
Output		\$6,665,412	\$33,423,682	\$8,436,905	\$7,940,081	\$41,860,587	\$49,800,668
Income		\$2,150,884	\$11,048,563	\$2,677,856	\$2,575,544	\$13,726,419	\$16,301,963
Employment		63	321	80	76	402	478
Total effects							
Output		\$24,081,833	\$109,354,439	\$29,439,702	\$28,244,411	\$138,794,141	\$167,038,552
Income		\$7,791,952	\$35,197,312	\$9,495,359	\$9,132,220	\$44,692,671	\$53,824,891
Employment		255	1,274	321	301	1,595	1,897

* Total guided and unguided trip related and package spending

**Estimates are not reported due to small sample size.

In addition to the economic activity directly attributable to spending by anglers are the multiplier effects (indirect and induced effects) of that consumer spending. The indirect effect results from the increased economic activity among businesses that supply those businesses selling directly to the anglers. For example, the guide that sells directly to anglers, in turn, stimulates additional activity among the businesses that supply the guide's operations. The induced effect is the economic activity produced by household spending of income earned by workers in those businesses that are impacted by both the direct and indirect effects. Including both direct and multiplier effects, the \$131.6 million of spending by anglers fishing saltwater in Southeast Alaska produced \$53.8 million of income and supported 1,897 full and part-time jobs (Table 73).

The relationship between the direct effect (i.e. directly attributable to the spending by anglers) and the total economic activity that it creates is commonly presented in the form of a multiplier. In the case of saltwater sportfishing in Southeast Alaska, the output multiplier of 1.42 (total effect divided by direct effect) means every dollar of activity stimulated by angler spending creates an additional \$0.42 of economic activity elsewhere in the regional economy. In similar fashion, the income and employment multipliers are 1.43 and 1.34, respectively. This means that for every dollar of income paid to workers in businesses that sell directly to anglers and for every job in a business that sells directly to anglers there is an additional \$0.43 of income and 0.34 additional jobs in other businesses throughout the regional economy that are supported by angler spending.

Employment effects are of particular importance to the state and local economy. The jobs supported by angler expenditures are shown in Table 74 categorized by the industry in which the jobs occur. The jobs directly supported by angler spending largely reflect the types of expenditures made by anglers – trip expenditures for food, bait, lodging and guide services, maintenance of real estate used for sportfishing, and retail purchases of fishing and related equipment. Sector 11 in the following table includes farming and commercial fishing and hunting and is directly affected primarily through anglers' purchases of groceries and bait. The broader distribution of jobs indirectly supported by angler spending through the multiplier effect is the result of inter-industry trade flows and the expenditures of household income that comes from angler-supported jobs.

42	38	8
1,897	417	1,412
Total Employment Impact		

The economic activity directly and indirectly generated in the 2 counties by saltwater anglers also produces tax revenues for local, state and federal governments. The IMPLA model produces generalized estimates of tax revenues that are based on existing statewide ratios of output, income and employment to all tax revenues. It is estimated that saltwater sportfishing expenditures in Southeast Alaska in 2007 provided \$14.2 million and \$12.2 million in state and federal tax revenues, respectively (Table 75). Nonresidents accounted for 11% of all tax revenues in the Southeast region attributed to saltwater anglers.

Table 74.—Employment (jobs) directly and indirectly supported by angler trip expenditures associated with saltwater fishing in Southeast Alaska in the Southeast region, by industry in which the employment occurs, 2007.

NAICS Industry Categories	Direct Effects	Multiplier Effects	Total Effects
11 Agriculture, forestry, fishing & hunting	46	30	76
21 Mining	6	1	7
22 Utilities	0	3	3
23 Construction	0	5	5
31-33 Manufacturing	18	7	25
42 Wholesale trade	57	8	65
48-49 Transportation & warehousing	97	37	134
44-45 Retail trade	174	56	230
51 Information	0	13	13
52 Finance & insurance	0	14	14
53 Real estate & rental	31	34	65
54 Professional- scientific & technical services	0	24	24
55 Management of companies	0	1	1
56 Administrative & waste services	2	38	39
61 Educational services	0	5	5
62 Health & social services	0	48	48
71 Arts- entertainment & recreation (e.g., guides)	574	16	590
72 Accommodation & food services	388	59	448
81 Other services	21	43	65
92 Government and public administration	6	36	42
Total Employment Impact	1,419	477	1,897

The economic activity directly and indirectly generated in the Southeast by saltwater anglers also produces tax revenues for local, state and federal governments. The IMPLAN model produces generalized estimates of tax revenues that are based on existing statewide ratios of output, income and employment to all tax revenues. It is estimated that saltwater sportfishing expenditures in Southeast Alaska in 2007 provided \$14.2 million and \$12.2 million of state/local and federal tax revenues, respectively (Table 75). Nonresidents accounted for 81.8% of all tax revenues in the Southeast region attributed to saltwater anglers.

Table 75.—Tax revenues generated by saltwater sportfishing trip spending in Southeast Alaska, 2007.

	State and Local Tax Revenues	Federal Tax Revenues	Total tax Revenues
RESIDENT ANGLERS			
Trip Expenditures (non-package)	\$2,713,584	\$2,077,440	\$4,791,024
Package Expenditures			\$0
Equipment & Real Estate Expenditures	NA	NA	NA
Subtotal	\$2,713,584	\$2,077,440	\$4,791,024
NONRESIDENT ANGLERS			
Trip Expenditures (non-package)	\$7,624,199	\$6,583,477	\$14,207,676
Package Expenditures	\$3,849,158	\$3,520,701	\$7,369,858
Equipment & Real Estate Expenditures	NA	NA	NA
Subtotal	\$11,473,357	\$10,104,178	\$21,577,534
ALL ANGLERS			
Trip Expenditures (non-package)	\$10,337,783	\$8,660,917	\$18,998,700
Package Expenditures	\$3,849,158	\$3,520,701	\$7,369,858
Equipment & Real Estate Expenditures	NA	NA	NA
Total	\$14,186,941	\$12,181,618	\$26,368,559

SUMMARY AND DISCUSSION

This study was conducted to provide current information regarding the economic contributions made by sportfishing to Alaska and its regional economies. Natural resource managers typically need to include economic considerations when planning land and water resource management or providing input to regulatory and policy decision-makers. Effective management requires accurate information at a level of analysis that enables decision-makers to address specific issues that affect a particular population or region. This study (ADF&G Sportfishing Economic Study, 2007, by Southwick Associates Inc, subsequently referred to as ADF&G Economic Study 2007) addresses that need by measuring the economic contributions of sportfishing in key regions of Alaska, broken down by residency of the anglers, the type of water they fished, and whether the fishing was guided or unguided.

MAJOR FINDINGS

In 2007, a total of 475,534 resident and nonresident licensed anglers fished 2.5 million days in Alaska and spent \$1.39 billion on licenses and stamps, trip-related expenditures, pre-purchased packages, and equipment and real estate used for fishing. An input-output model of Alaska and the study regions was used to estimate the total economic contributions that the spending created through the economic multiplier effect. The \$1.39 billion of angler spending in Alaska supported 15,879 jobs in Alaska and provided \$545.3 million of income (Table 76). Although residents spent more than nonresidents (\$733.3 million compared to \$652.5 million), it was the nonresident spending that made a larger economic contribution (more jobs and income). This was the result of differences in the kinds of expenditures made by residents and nonresidents. Resident anglers spent more of their money on equipment that is manufactured primarily outside of Alaska while nonresidents spent most their money on trip-related purchases and pre-arranged packages that include services such as guides, lodging and meals produced by Alaska businesses.

As anglers' dollars move from business to business in the Alaska economy, government revenues are generated by local property taxes, sales taxes, business taxes, excise taxes, etc. In total, \$123.1 million in tax revenues were generated for state and local governments in Alaska and \$123.2 million for the Federal government.

Detailed fishing activity, spending and economic contributions are provided in the report for each study region. Some of the highlights include:

- Approximately three-quarters of all fishing and spending in Alaska took place in the Southcentral region. The \$988.6 million spent by anglers in that region:
 - Provided \$386.5 million of income
 - Supported 11,535 jobs
- In Cook Inlet, located within the Southcentral region, anglers spent \$733.0 million that:
 - Provided \$278.8 million of income
 - Supported 8,056 jobs
- Approximately one-fifth of all fishing and spending took place in the Southeast region. The \$273.5 million spent by anglers in that region:
 - Provided \$99.1 million of income
 - Supported 3,063 jobs
- Saltwater fishing is particularly important in the Southeast region. The \$131.6 million that was spent by marine anglers in that region:
 - Provided \$53.8 million of income
 - Supported 1,897 jobs
- Approximately 8% of all fishing and spending took place in the Interior region. The \$100.6 million spent by anglers in that region:
 - Provided \$28.6 million of income
 - Supported 923 jobs
- The regions of Alaska vary markedly in the types of fishing that they offer:
 - The Southeast region is dominated by saltwater fishing – 81% of all fishing days were in saltwater.
 - The Interior region is dominated by freshwater fishing – over 99% of all fishing days were in freshwater.
 - The Southcentral region offers a more balanced mix of fishing – 66% freshwater and 34% saltwater.
- Most fishing in Alaska is unguided, although the use of guides ranges from 10% of angler days in the Interior to 34% in the Southeast.
- Guides are more likely to be used by nonresidents (43% of nonresident angler days compared to 9% of residents), and by anglers who fish saltwater (33% of angler days in saltwater compared to 16% in freshwater).

Table 76 summarizes the fishing activity in Alaska broken down by residents and nonresidents, along with their total spending by major category. More licenses are sold to nonresidents than residents, but not surprisingly, residents account for more of the total fishing activity in the state (days fished) since most nonresident fishing occurs during short-term visits. Residents spent more money in Alaska for fishing than nonresidents, but the nonresident spending makes a bigger contribution to the state's economy. This is due to the larger proportion of nonresident spending that is focused on goods and services that are provided directly by Alaskan businesses; whereas Alaska residents spend a larger percentage of their money on equipment manufactured outside of Alaska, resulting in less direct impact on the in-state economy.

Since little of the fishing equipment that Alaskans bought is produced within the state, much of that spending leaks quickly out of the Alaska economy and has a multiplier effect that is limited only to those in-state business that are involved in making the goods available to consumers in Alaska. That is why it is possible for industry output to be less than actual angler spending, as is the case with resident expenditures. The only industry output in Alaska that is associated with the purchase of goods produced elsewhere (e.g., boats, motors, vehicles, fishing tackle, etc.) is the wholesale and retail margin retained by those businesses in Alaska, and the transportation sector that moves the goods within the state.

Table 76.—Summary of economic contributions of sportfishing in Alaska, 2007

	Resident Anglers	Nonresident Anglers	All Anglers
Licensed anglers*	190,644	284,890	475,534
Days fished**	1,459,380	1,080,438	2,539,818
Angler purchases:			
<i>Licenses and Fees</i>	\$6,627,558	\$16,536,955	\$23,164,513
<i>Trip-related (non-package)</i>	\$219,829,151	\$347,358,999	\$567,188,150
<i>Packages</i>	NA***	\$137,519,700	\$137,519,700
<i>Equipment</i>	\$433,693,104	\$41,385,450	\$475,078,554
<i>Real Estate (construction & repair)</i>	\$73,139,537	\$109,697,619	\$182,837,156
Total dollars spent	\$733,289,349	\$652,498,723	\$1,385,788,072
Total economic contribution, including multiplier effects:			
<i>Industry output</i>	\$668,729,829	\$938,863,856	\$1,607,593,685
<i>Income provided</i>	\$223,373,937	\$321,882,151	\$545,256,088
<i>Jobs supported</i>	6,442	9,437	15,879

* Source: Alaska Department of Fish and Game. Includes purchased licenses and issued PIDs (Personal Identification cards) and DAVs (Alaska Disabled American Veteran permits).

**Totals reported here do not exactly match published statewide and regional totals from the 2007 SWHS due to the fact that it is not possible to identify the water type or guided/unguided status of some SWHS survey responses. The totals reported in this table reflect the summary of all days fished within a region that could be assigned to a specific residency, water type, and guided/unguided category. Approximately 4,177 days fished (0.16% of 2.5 million days) could not be assigned to a stratum and were not included in these totals.

***Package expenditures refer specifically to purchases of travel packages made by nonresidents prior to departing on their trip to Alaska.

STUDY LIMITATIONS

The results presented in this report are based on a survey of anglers who obtained an Alaska sportfishing license in 2007, including Alaska residents and nonresidents. The estimates that were produced are subject to limitations that are inherent in survey research, including sampling errors, nonsampling errors, and response bias.

Sampling Errors

Within the limits of the project budget, an effort was made to obtain a sufficient number of responses from a representative sample of licensed anglers to produce reliable estimates at the desired levels of analysis (guided/unguided by residency by water type within each geographic region). Estimates were not reported for any level of disaggregation where the number of observations was deemed insufficient (see Appendix J for a description of the usable responses within each analysis strata and the specific strata for which estimates are not reported in the study). Summary statistics, including standard deviation, for all data elements collected in the angler surveys are presented in Appendix G although they are not necessarily indicative of the margins of error associated with the final estimates contained in the report. This is due to the additional calculations required to estimate total spending in Alaska based on the survey responses. The procedures for estimating the economic contributions of angler spending included a number of steps and data transformations which made it prohibitively difficult to calculate the sampling error associated with each of the many estimates. For example, estimates of annual trip expenditures are the result of pooling survey estimates across multiple time periods, each with its own margin of error. The regional annual means for residents and nonresidents were disaggregated by type of water fished and whether or not the fishing was guided. The resulting mean expenditure estimates per angler-day for each time period were then multiplied by estimates of total annual angler-days in each region, which were derived from a separate survey conducted by ADF&G with its own set of sampling and nonsampling errors. The estimates of total spending for each data collection region were then aggregated into the study regions. The resulting annual expenditure totals were then processed through input-output models that introduce an additional layer of potential, but unknown estimation errors. The end result is a valid estimation of the economic contribution of sportfishing in Alaska, albeit with an unknown margin of error. Ultimately, the study design, survey methodology and sample sizes were developed carefully in consideration of the study objectives and the estimates produced by the study can be considered an accurate representation of the economic contributions of sportfishing to the Alaska economy.

Nonsampling Errors

Potential nonsampling errors can arise from several sources that are unrelated to the precision of the estimates produced by the study but have the potential to introduce bias in the study results. These errors generally derive from the overall study design and implementation procedures. They can include the sample frame from which the mailing list was drawn, omission of important expenditure categories, data entry/coding/cleaning, the wording of questions in the survey instrument, and recall bias. Considerable care was taken in the design of the study to minimize these sources of error; however the following may have affected the results. Unlike sampling errors, their effects are not measurable.

Potential sources of nonsampling errors include:

- The survey instruments attempted to include all expenditures that are reasonably associated with fishing. However, in the compromise between collecting large amounts of detailed data and limiting the size of the questionnaire to encourage respondents to complete the survey, it is possible that some fishing related expenditures have not been included in the total estimates of anglers' spending. In an effort to ensure that the key types of expenditures were included in the study, development of the survey instrument included the participation and careful scrutiny by staff of ADF&G who are familiar with fishing activity in Alaska.
- A respondent's misinterpretation of survey questions can lead to the inclusion of inaccurate or inappropriate responses. In addition to the multiple layers of review and editing, the survey questionnaire was pre-tested by Alaska residents and nonresidents in a procedure that included both in-person and telephone feedback. Following completion of the survey, the responses were carefully reviewed to remove illogical responses as part of the process of identifying outlier values.
- The data entry procedures included a screening process for out-of-bound values to minimize data entry errors. In addition, all upper-bound values were compared to the original source questionnaires for verification. Final decisions regarding outlier values were made in conjunction with ADF&G staff.
- The sample frame for the study was defined as all anglers who were issued licenses to sport fishing in 2007, including those that were purchased, PIDs or DAVs in 2007. However, the sportfishing population includes other nonlicensed anglers who may also spend money as a result of their fishing activity. This includes primarily youth age 15 and younger who are not required to purchase a license. To an unknown extent, they are included in the survey when a respondent's expenditures include spending on meals, lodging, bait, equipment, etc. for an unlicensed angler. As a snapshot of all anglers' spending, the sample also includes respondents whose fishing expenses were paid by someone else and would report \$0.00 of spending. On the other hand, unlicensed anglers, such as youth, were not given an opportunity to complete their own survey. It is currently not possible to directly estimate the economic contribution of unlicensed anglers on the Alaska economy given how the DSF Statewide Harvest Survey is currently conducted and the difficulty of reaching the unlicensed population.
- The estimate of total angler days used in calculating estimated trip expenditures is based on the DSF Statewide Harvest Survey—which is a household survey used to estimate all sportfishing catch, effort and harvest in Alaska whether by licensed anglers or those who are not required to have a license (e.g., youth under age 15). It is not possible under the current study design to produce separate estimates of licensed and unlicensed angling effort (days fished) from the SWHS, so the total estimate of days fished in Alaska was used. The inclusion of unlicensed effort in the total expenditure calculation would have the impact of inflating the trip expenditure estimates by a small amount. However, this effect is likely balanced out by the fact that unlicensed angler expenditures were not captured as part of the angler survey used in this study due to the difficulty of reaching the unlicensed population of anglers.

Response Bias

The results of the survey could be affected by the ability of respondents to accurately recall information regarding their past fishing activity, and from the decision by specific types of respondents within the sample to forego participating in the survey altogether. Potential sources of response bias errors include:

- Recall error is an issue in any survey that asks respondents to report information from an event that took place at some previous point in time. This study tried to limit this source of error by conducting two waves of survey mailings (in the Summer and Fall/Winter) to restrict the amount of time between receipt of the survey and the fishing trip on which respondents were asked to report.
- Telescoping error is the tendency of respondents to report significant events as having occurred more recently than they actually did. In the angler survey, this type of error might have led some respondents to reference a bigger or more expensive fishing trip as being the last one taken within the surveys' reference periods while forgetting about a smaller trip that might have occurred later. If this occurred, it could bias the reported expenditures upward. Telescoping is more often associated with shorter recall periods, so the survey recall periods were designed as a compromise to minimize both recall errors and telescoping errors.
- The ability of respondents to allocate expenditures for multi-purpose items to a specific use is a particular concern when it involves expensive items because small differences in the percent allocated to fishing might produce unexpected results. In the equipment category, purchases of boats is an example of this type of equipment expenditure, and at \$101.1 million spending by residents it is also the largest equipment expenditure (\$530 per angler). For comparison, total retail boat sales in 2002 (the latest year for which government statistics are available) were \$391 for every adult male age 18-64 living in Alaska that year (adjusted for inflation to 2007 dollars)⁴¹. By that comparison, \$530 per angler, for individuals who are more likely to buy a boat than the average resident, does not seem unreasonable.
- Surveys are subject to the possibility that the persons who choose to respond are systematically different from persons who do not respond and extrapolating the survey results may not accurately reflect the study population. Tests for such nonresponse bias can be made by comparing the responses of people who respond to the first mailing to those who respond to later mailings under the assumption that later responders are more like non-responders. An analysis of variance on all expenditure variables found a statistically significant difference (at the 95% confidence level) in the mean expenditure between mailings for only two of the more than 60 expenditure categories in the survey (ice purchased between May and June, and equipment expenditures for rods and reels). The lack of extensive differences between mailings, especially for expensive items such as boats and vehicles, suggests that there was no systematic nonresponse bias in the survey.

⁴¹ United States Census Bureau. 2005. Alaska: 2002 Economic census, retail trade geographic area series. U.S. Department of Commerce Economics and Statistics Administration, Washington, D. C.

- The study experienced unexpected problems in data collection due to the occurrence of duplicate identification numbers and a printing error. This is discussed in detail elsewhere in the report and summarized here, however, it is believed that the results of the study were not adversely impacted to a significant degree.

- During the first mailing of the Wave II surveys, respondents on the resident mailing list were issued the same set of identification numbers that were also issued to nonresidents. When completed surveys were returned, the mail house that received the surveys was not always able to identify the appropriate respondent (i.e., in cases where there was no postmark to distinguish resident from nonresidents). The problem was mitigated by having employees of Southwick Associates open the envelopes to make the resident-nonresident determination, and distinct identification numbers were issued for the second and third mailings. Still, an unknown number of anglers who did not respond to the first mailing were not sent additional mailings, while some anglers who responded to the first mailing received additional mailings.
- In the third mailing of the Wave II surveys, the questionnaires were printed on the same color paper as the second mailing. Since the paper color was intended to be the means for determining to which mailings the anglers responded, this limited the ability to measure overall response bias. This did not affect the first mailing and no response bias was detected between the first mailing and the subsequent (second and third) mailings.

INTERPRETING THE RESULTS

Sportfishing was an important part of the Alaska economy in 2007, providing jobs and income to many of Alaska's residents. Including the multiplier effects, sportfishing supported nearly 16,000 jobs and provided \$545.3 million of income. Table 77 places this into perspective by comparing the economic contribution of sportfishing to the total economic activity in each of the study regions. The table shows that sportfishing's relative contribution varies, by region. It is of greatest relative importance in the Southeast region where it accounted for approximately 4.8% of the total income and 6.4% of all jobs in the region. Conversely, it is of less relative importance in the Interior, where it provided 0.6% and 1.0% of all income and jobs, respectively (to maintain comparability, the estimates of output, income and employment due to sportfishing that were generated by using the IMPLAN models are compared to similar measures for all economic activity as reported by the IMPLAN models; the latest available IMPLAN economic data for Alaska is 2006).

Table 77.—Economic contributions from sportfishing in Alaska compared to total economic activity in each region.

	Angler Spending	Total Economic Contribution*		
		Output	Income	Employment
Southeast				
Sportfishing-related	\$273,504,804	\$295,260,010	\$99,141,694	3,063
All economic activity**		\$4,927,726,000	\$2,047,290,000	47,799
% sportfishing-related		6.0%	4.8%	6.4%
Southcentral				
Sportfishing-related	\$988,558,119	\$1,165,545,513	\$386,463,733	11,535
All economic activity**		\$38,271,608,000	\$14,289,604,000	300,535
% sportfishing-related		3.0%	2.7%	3.8%
Interior				
Sportfishing-related	\$100,560,637	\$86,712,709	\$28,563,882	923
All economic activity**		\$12,568,651,000	\$4,784,721,000	88,667
% sportfishing-related		0.7%	0.6%	1.0%
Statewide Total				
Sportfishing-related	\$1,385,788,072	\$1,607,593,685	\$545,256,088	15,879
All economic activity**		\$55,766,476,000	\$21,121,616,000	437,001
% sportfishing-related		2.9%	2.6%	3.6%

*Including direct and multiplier effects.

**Source: 2006 IMPLAN economic models.

The number of jobs supported by sportfishing statewide in 2007 (15,879) is essentially the same as the total number of jobs in the state's entire manufacturing sector in 2006 (approximately 15,900⁴²). The economic importance of the two sources of economic activity are not directly

⁴² Source: IMPLAN economic data for the state of Alaska, 2006.

comparable because the contribution of sportfishing includes the multiplier effect of angler spending (some of which is included in the manufacturing sector). Nevertheless, it is useful as a context for assessing the number of jobs directly and indirectly associated with sportfishing.

It also is useful to compare the results of the current survey to other studies of sportfishing in Alaska. The most comparable study was conducted by the Institute of Social and Economic Research at the University of Alaska Anchorage (ISER)⁴³. That study was completed in 1999 and based on surveys of anglers conducted primarily in 1993. It found that anglers spent \$540 million on sportfishing activities during the 1993 fishing season, while this study (Southwick) estimates total spending at \$1.39 billion in 2007 (Table 78). To account for differences in the number of anglers, the totals are converted to expenditures per angler based on total license sales in the respective years. Finally, to account for inflation during the period between 1993 and 2007, the ISER average expenditures per angler are converted to 2007 dollars based on the U.S. Department of Labor's Consumer Price Index. The result shows that this study's estimates are 36.2% higher than the inflation-adjusted ISER estimate. Trends in angler expenditures have shown a steady rise in the purchases made by the average angler. This increased spending can be estimated by comparing the results of national angler surveys conducted by the U.S. Fish and Wildlife Service in 1991 and 2006^{44, 45}. Using the same procedures that were employed to compare the 1993 ISER study to the current study, the results show that the average angler in the U.S. spent 40.6% more in 2006 than in 1991, after adjusting for inflation. On that basis, the estimates of total spending produced by the current study appear to be comparable to the estimates of the earlier ISER study.

Table 78.—Comparison of spending estimates in the current study to an earlier study of sportfishing in Alaska, with adjustments for inflation, participation, and trends in angler spending.

Study	Year	TOTAL spending	# anglers	\$/angler	Inflation- adjusted \$/angler
ALASKA					
ISER	1993	\$540,000,000	362,093	\$1,491	\$2,140
ADF&G Economic Study 2007	2007	\$1,385,788,072	475,534		\$2,914
<i>difference</i>					36.2%
US					
USFWS	1991	\$24,000,000,000	35,578,000	\$675	\$997
USFWS	2006	\$42,000,000,000	29,952,000		\$1,402
<i>difference</i>					40.6%

⁴³ Haley, Sharman, et al. *The Economics of Sportfishing in Alaska*, Institute of Social and Economic Research, University of Alaska Anchorage, December 1999.

⁴⁴ U.S. Department of the Interior, Fish and Wildlife Service, and U.S. Department of Commerce, U.S. Census Bureau. 2006 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation.

⁴⁵ U.S. Department of the Interior, Fish and Wildlife Service, and U.S. Department of Commerce, U.S. Census Bureau. 2001 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation.

More recently, the National Marine Fisheries Service (NMFS) released its state-level estimates of the economic contribution of recreational marine fishing⁴⁶. The NMFS study estimates that saltwater anglers in Alaska spent \$499.1 million in 2006, including trip and equipment expenditures, but not including expenditures for fishing packages. The ADF&G 2007 study did not allocate equipment expenditures by type of water fished, but an approximate allocation can be made on the basis of angler-days attributed to saltwater (41.4%). Using that allocation, equipment and real estate spending in this study that can be attributed to salt water is \$272.1 million. As a result, the NMFS study estimates of trip and equipment spending are consistently 11%-12% lower, and suggests that the estimates of total saltwater spending in both studies are somewhat similar (Table 79).

Table 79.—Comparison of spending for saltwater fishing in the current study to expenditure estimates from 2006 NMFS Marine Expenditure Survey.

	ADF&G Economic Study 2007	NMFS Study 2006*	Difference
Angler-Days	1,050,359	NA	
Percent of Total Fishing	41.4%		
Trip spending (non-package)	292,069,076	257,572,000	11.8%
Equipment & real estate spending	272,085,515	241,544,000	11.2%
Total spending	564,154,590	499,116,000	11.5%

* Gentner, Brad, and Scott Steinbeck. 2008. *The economic contribution of marine angler expenditures in the United States, 2006*.

Table 80 shows which industries in Alaska were affected by the expenditures made by sportfishing anglers in Alaska in 2007 (additional details of the industry impacts are provided in Appendix O). These figures represent the total contribution of angler spending, including the direct effect of spending and the multiplier effects. The largest employment impacts occur in sector 71 (arts, entertainment & recreation – e.g., guides), sector 44-45 (retail trade), and sector 72 (accommodation & food services). Sportfishing contributed 9,332 jobs in these three sectors, combined. That is more than 58% of the total number of jobs supported by sportfishing. These sectors are characterized by a significant level of seasonal and part-time employment which generally leads to lower average annual wages. Because average wages in these sectors are among the lowest of the major industry sectors, it is not surprising that the relative contribution of sportfishing to total income is less than its contribution to total jobs. This is made clear in Table 81 where it shows that sportfishing accounts for 3.7% of all jobs statewide, but only 2.6% of total income. This is a pattern that holds true for each of the regions, as well. The highest average wages in Alaska occur in the state's mining (primarily oil and gas), utilities, management, and construction industries and with the exception of construction, sportfishing contributes little to the economic activity in these high wage sectors.

⁴⁶ Gentner, Brad, and Scott Steinbeck. 2008. *The Economic Contribution of Marine Angler Expenditures in the United States, 2006*. U.S. Dep. Commerce, NOAA Tech. Memo. NMFSF/SPO-94, 301 p.

Table 80.—Statewide industries affected by sportfishing anglers' expenditures in Alaska (including multiplier effects).

NAICS Industry Categories	Output	Income	Jobs
11 Ag, Forestry, Fish & Hunting	\$11,505,704	\$3,286,760	312
21 Mining	\$54,942,427	\$14,212,919	74
22 Utilities	\$18,749,962	\$4,251,608	43
23 Construction	\$190,667,861	\$73,329,024	1,089
31-33 Manufacturing	\$146,622,482	\$12,148,088	314
42 Wholesale Trade	\$80,807,105	\$30,540,597	561
48-49 Transportation & Warehousing	\$104,367,201	\$36,150,850	699
44-45 Retail trade	\$231,341,569	\$97,083,148	3,493
51 Information	\$22,910,578	\$5,290,195	107
52 Finance & insurance	\$32,419,273	\$9,357,746	162
53 Real estate & rental	\$79,230,449	\$26,247,581	744
54 Professional- scientific & tech services	\$39,361,393	\$17,073,359	345
55 Management of companies	\$7,403,223	\$3,193,217	41
56 Administrative & waste services	\$22,204,906	\$8,509,106	300
61 Educational services	\$3,309,539	\$1,537,386	66
62 Health & social services	\$49,750,195	\$27,119,391	571
71 Arts, entertainment, recreation (e.g., guides)	\$197,450,887	\$62,808,215	3,363
72 Accommodation & food services	\$182,588,793	\$61,785,118	2,530
81 Other services	\$50,645,014	\$18,680,740	612
92 Government & non NAICS	\$95,377,191	\$38,007,196	639
Total Angler Expenditures	\$1,621,655,731	\$550,612,229	16,065

The spending by nonresident anglers impacts somewhat different industries than those affected by resident anglers. Because nonresidents are more likely to employ guides, stay in temporary accommodations and eat meals in restaurants, a larger proportion of their impact affects those industries compared to residents. A larger proportion of residents' spending, on the other hand, is focused on purchasing equipment. As a result, resident spending has a relatively greater association with jobs and income in the retail trade sector than does spending by nonresidents. Interestingly, while the distribution of industries affected by anglers' spending varies significantly between residents and nonresidents, the total proportions represented by the three major sectors (retail trade; arts, entertainment & recreation; accommodation & food services) are nearly the same for both residents and nonresidents.

Table 81.—Statewide industry impacts due to resident and nonresident sportfishing anglers' expenditures in Alaska (including multiplier effects).

NAICS Industry Categories	RESIDENT ANGLERS		NONRESIDENT ANGLERS	
	Income	Employment	Income	Employment
44-45 Retail trade	27.4%	33.7%	10.8%	13.5%
71 Arts, entertainment & recreation	7.6%	14.0%	14.1%	25.7%
72 Accommodation & food services	6.9%	10.0%	14.2%	19.7%
<i>Subtotal</i>	41.9%	57.7%	39.1%	58.9%
All other industries	58.1%	42.3%	60.9%	41.1%
Total Angler Expenditures	100.0%	100.0%	100.0%	100.0%

Finally, the unique quality of Alaska's fishing experience attracts a large number of sport anglers from outside its borders. Almost 60% of the jobs and income attributed to sportfishing activity can be considered an economic impact to the state's economy that would not exist if not for sportfishing. In the Southeast region, nonresidents account for nearly three-fourths of the total economic contribution of sport anglers. Over 9,400 jobs and \$321.9 million of income are the result of the people that travelled to Alaska and subsequently went sportfishing. Directly comparable studies of other visitor activity in Alaska are not readily available, however, a recent study of visitors commissioned by the Alaska Department of Commerce found that people visiting Alaska for vacation/pleasure spent \$1.5 billion during the 2006/2007 tourism season (not including the cost of transportation to enter or exit the state.)⁴⁷ Based on this measure, the \$741 million spent by nonresident sport anglers in 2007 represents approximately 50% of all visitor spending, underscoring the importance of fishing to Alaska's tourism industry.

⁴⁷ Alaska Visitor Statistics Program V: Fall/Winter 2006-2007 McDowell Group, Inc.

- Questionnaire
- 1st mailing cover letter
- 2nd mailing cover letter
- 3rd mailing cover letter



Alaska SportFishing Economic Survey

INTRODUCTION: Thank you for participating in this survey. The purpose of the survey is to quantify the economic contributions of sportfishing to Alaska's economy. "Sportfishing" is defined as the taking of fish and shellfish (clams, crabs, shrimp, etc) under Alaska sportfishing license and regulations, including personal use fishing (e.g. dipnetting). Please do not report activities and expenditures associated with subsistence fishing, which is defined as the taking or possession of fish, shellfish, or other fisheries resources for subsistence uses.

Section A - GENERAL: In this section, we are interested in learning some general information about your sportfishing activities in Alaska.

1. How often do you go sportfishing in Alaska? (check only one)

- ☐ Every year
- ☐ Almost every year
- ☐ Every few years
- ☐ Infrequently, once in several years
- ☐ This is my first year

2. Did you buy an Alaska sportfishing license in 2007 primarily to go personal use fishing (e.g., dipnetting, gill netting, etc.)?

- ☐ Yes
- ☐ No

3. As best as possible, please report the number of days you went sportfishing in November and December, 2006. (Please enter "0" if you did not fish in this period.)

Number of saltwater fishing days _____ Number of freshwater fishing days _____

4. Did you go sportfishing in Alaska between January 1st and June 30th, 2007? (check one)

- ☐ Yes
- ☐ No → PLEASE SKIP TO SECTION D - PAGE 5

Section B. SPORTFISHING ACTIVITY: In this section, we want to know how often you went sport fishing in Alaska between January 1st and April 30th 2007 and between May 1st and June 30th, 2007.

*** PLEASE REFER TO THE ENCLOSED MAP TO ANSWER THESE QUESTIONS ***

-continued-

Section B. SPORTFISHING ACTIVITY: In this section, we want to know how often you went sport fishing in Alaska between January 1st and April 30th 2007 and between May 1st and June 30th, 2007.

*** PLEASE REFER TO THE ENCLOSED MAP TO ANSWER THESE QUESTIONS ***

5. JANUARY through APRIL: How many days did you go freshwater and saltwater fishing in each region between January 1st and April 30th, 2007? Please fill in an answer for each region. (Enter "0" if you did not fish in that region.)

	Number of days of freshwater fishing (January thru April)	Number of days of saltwater fishing (January thru April)
EXAMPLE	3	0
Region A		
Region B		
Region C		
Region D		
Region E		No saltwater in region E
Region F		

6. MAY through JUNE: How many days did you go freshwater and saltwater fishing in each region between May 1st and June 30th, 2007? Please fill in an answer for each region. (Enter "0" if you did not fish in that region.)

	Number of days of freshwater fishing MAY thru JUNE	Number of days of saltwater fishing MAY thru JUNE
EXAMPLE	4	2
Region A		
Region B		
Region C		
Region D		
Region E		No saltwater in region E
Region F		

Section C - LAST TIME YOU WENT SPORTFISHING: Now we would like to know about the last time you went sportfishing in Alaska between January 1st and June 30th, 2007. Please remember, "sportfishing" includes personal use (e.g., dipnetting) and shellfish fishing, but does not include subsistence fishing.

***** ALL OF THESE QUESTIONS REFER TO THE LAST TIME YOU WENT SPORTFISHING IN ALASKA *****

***** BETWEEN JANUARY 1ST AND JUNE 30TH, 2007 *****

7. When was the last time you went sportfishing in Alaska between JANUARY 1ST AND JUNE 30TH, 2007?

(Check one.)

☐ January ☐ February ☐ March ☐ April ☐ May ☐ June

8. Fishing trips often include time for fishing, travel and non-fishing activities. How long was this last 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 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: _____

9. How many days did you actually fish during this last time that you went fishing in Alaska? (Count partial days of fishing as "1" day.)

Number of days actually fished: _____

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

☐ Yes ☐ No

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

☐ rod & reel sportfishing ☐ dipnetting (personal use) ☐ shellfish fishing

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

☐ in freshwater ☐ in saltwater ☐ in both freshwater & saltwater

13. Did you pay for a guide or a charter boat on this trip? (check one)

☐ Yes ☐ No

14. Where did this trip occur? Please refer to the map included with this survey. (Check all that apply.)

☐ Region A ☐ Region B ☐ Region C
☐ Region D ☐ Region E ☐ Region F

15. Which species did you target the last time you went sportfishing in Alaska between JANUARY 1ST AND JUNE 30TH, 2007? Please note the species you targeted may not necessarily be the fish actually caught on your trip. (Check all that apply.)

- | | |
|--|---|
| ☐ King Salmon (Chinook) | ☐ Steelhead |
| ☐ Silver Salmon (Coho) | ☐ Trout (rainbow, cutthroat, lake trout, etc.) |
| ☐ Red Salmon (Sockeye) | ☐ Halibut |
| ☐ Other Salmon (Pink, Chum) | ☐ Shellfish (clams, crab, shrimp, etc.) |
| ☐ Other freshwater (Dolly Varden, char, burbot, Arctic grayling, northern pike, sheefish, etc.) | ☐ Other saltwater (lingcod, rockfish, shark, etc.) |

16. As best as possible, please tell us how much you spent and where you bought the following TRIP-RELATED items ON THE TRIP DESCRIBED ABOVE. Please write in the amount you spent and, referring to the included map, please circle the letter of the region or regions where you made the purchase(s). We will ask about your equipment purchases in later questions.

Items purchased on last trip (between JANUARY 1 ST AND JUNE 30 TH , 2007).	Total Amount Spent	Region or regions where you bought the item
EXAMPLE	\$ 25	A (B) C D (E) F
Licenses and stamps	\$	A B C D E F
Fuel and oil for your car, truck, boat, airplane, ATV & other transportation	\$	A B C D E F
Guide and charter fees	\$	A B C D E F
Transportation services (air taxis, boat ferries, shuttle vans, taxi, etc.)	\$	A B C D E F
Boat launch and dockage fees	\$	A B C D E F
Ice	\$	A B C D E F
Bait (natural bait only, do not include lures)	\$	A B C D E F
Groceries, food, liquor bought in stores (not in restaurants or bars)	\$	A B C D E F
Restaurants, bars, and take-out food purchases	\$	A B C D E F
Heating and cooking fuels	\$	A B C D E F
Fish processing & shipping	\$	A B C D E F
Rentals (boats, equipment, autos, etc.)	\$	A B C D E F
Overnight accommodations (hotels/motels, B&B's, campgrounds, cabin rental, etc.)	\$	A B C D E F
Derby tickets	\$	A B C D E F
Souvenirs and gifts	\$	A B C D E F
Other entertainment expenses during fishing trip (movies, etc.)	\$	A B C D E F
Other (please specify): _____	\$	A B C D E F

Section D. FISHING EQUIPMENT EXPENDITURES: In this section, we want to know about sportfishing and related equipment you bought **IN ALASKA during the last 12 months**, including equipment purchased for personal use (e.g., dipnet) and/or shellfish fishing.

17. As best as possible, please tell us how much you spent and where you bought the following fishing equipment and fishing related gear in the last 12 months. Only report purchases made in Alaska - exclude purchases from catalogs and web sites of out-of-state companies. Include purchases you made for yourself and for others. Write in the amount spent and, referring to the included map, circle the letter of the region or regions where you made the purchase(s). Since some items can be used for non-fishing activities, please estimate the percentage that the purchased fishing related gear is used for sportfishing.

Items purchased <u>WITHIN THE LAST 12 MONTHS</u> :	Total amount spent	Region or regions where you bought the item	% Used for sport fishing:
EXAMPLE	\$ 40	A (B) C (D) E F	65 %
FISHING EQUIPMENT:			
Licenses and stamps	\$	A B C D E F	100 %
Rods, reels, & components	\$	A B C D E F	100 %
Fishing tackle (lines, leaders, lures, creels, stringers etc)	\$	A B C D E F	100 %
Tackle boxes, cases to protect fishing equipment	\$	A B C D E F	100 %
Depth finders, fish finders, other electronics	\$	A B C D E F	100 %
Landing nets, dipnets & gillnets	\$	A B C D E F	100 %
Miscellaneous fishing equipment (knives, scales, etc.)	\$	A B C D E F	100 %
Shellfish fishing equipment (shovels, pots, buckets, etc.)	\$	A B C D E F	100 %
Fish mounting (taxidermy)	\$	A B C D E F	100 %
Books and magazines devoted to fishing	\$	A B C D E F	100 %
FISHING-RELATED GEAR:			
Items to store/preserve fish (smoker, vacuum sealer, etc.)	\$	A B C D E F	%
Coolers, fish boxes	\$	A B C D E F	%
Clothing (fishing vest, raingear, head net, etc.)	\$	A B C D E F	%
Boots, shoes, waders and other footwear	\$	A B C D E F	%
Life jackets, survival suits or other PFDs	\$	A B C D E F	%
Boats, canoes, rafts, kayaks and other watercraft	\$	A B C D E F	%
Boat motors	\$	A B C D E F	%
Trailers, hitches, and accessories	\$	A B C D E F	%
Other boat parts and accessories	\$	A B C D E F	%
Bear spray, bug spray, sun screen	\$	A B C D E F	%
Firearms for personal protection	\$	A B C D E F	%
Cameras, binoculars, sun glasses	\$	A B C D E F	%
Tents, screen rooms, tarps, backpacks, sleeping bags	\$	A B C D E F	%
Camping trailer (pop-up, self-contained, 5th wheel)	\$	A B C D E F	%
Other camping equipment (stoves, grills, lanterns, etc.)	\$	A B C D E F	%
Vehicles (trucks, SUVs, motorhomes, etc.)	\$	A B C D E F	%
Airplanes and related equipment	\$	A B C D E F	%
ATVs, snowmachines	\$	A B C D E F	%
Boat/camper registrations and excise taxes	\$	A B C D E F	%
Vehicle, boat or airplane repair/maintenance	\$	A B C D E F	%
Other (please specify):	\$	A B C D E F	%

18. Please report how much you spent IN THE PAST 12 MONTHS related to any Alaska real estate that was purchased or used primarily for sportfishing purposes. (If you spent nothing, enter "0".)

Real estate spending for fishing within the last 12 months:	Amount spent	Please circle where the property is located
EXAMPLE	\$ 25,000	A B C D E F
Expenses related to real estate <u>owned</u> or <u>shared</u> for fishing (including mortgage payments, insurance, property taxes, etc.)	\$	A B C D E F
Expenses related to land, cabins and/or other real estate property <u>leased</u> or <u>rented</u> for fishing, including boat slips and storage	\$	A B C D E F
Maintenance and repairs to real estate property	\$	A B C D E F
Construction of cabins, sheds, and other buildings	\$	A B C D E F

Section E. BACKGROUND INFORMATION: To help us learn more about who fishes in Alaska, please answer these final questions. All answers you provide will be kept fully confidential. Your answers will help us evaluate the survey to best represent ALL Alaska anglers, even those not surveyed.

19. In which region is your primary residence? (Using the map included with this survey, (check one.)

- ☐ Region A ☐ Region B ☐ Region C
☐ Region D ☐ Region E ☐ Region F

20. What is your gender?

- ☐ Male ☐ Female

21. What year were you born? 19_____

22. Which category best describes the highest level of education you have completed? (Check one)

- ☐ Did not graduate from high school
☐ High school graduate or GED
☐ 1-3 years college (some college)
☐ College graduate (bachelor degree or equivalent)
☐ Postgraduate, master's degree, doctorate, law degree, other professional degree

23. Which best describes your household's annual, before-tax income? (Check one)

- ☐ Less than \$9,999 ☐ \$60,000 - \$69,999
☐ \$10,000 - \$19,999 ☐ \$70,000 - \$79,999
☐ \$20,000 - \$29,999 ☐ \$80,000 - \$89,999
☐ \$30,000 - \$39,999 ☐ \$90,000 - \$99,999
☐ \$40,000 - \$49,999 ☐ \$100,000 - \$249,999
☐ \$50,000 - \$59,999 ☐ \$250,000 or more

If you have any additional comments you wish to share about this study please provide them here:

-continued-

If you have any additional comments you wish to share about this study please provide them here:

SARAH PALIN, GOVERNOR

P.O. BOX 11528
JUNEAU, AK 99811-5208
PHONE 907-586-1100
FAX 907-586-1100

STATE OF ALASKA
DEPARTMENT OF FISH AND GAME
OFFICE OF THE COMMISSIONER

(DATE)

Dear Alaska Angler:

You have been selected to participate in a study aimed at measuring the economic significance of sport fishing in Alaska. You were selected to be part of this study as a result of having purchased an Alaska sport fishing license in 2007. Even if you did not fish in Alaska last year or do not really care about these issues, we would still like to hear from you. You are one of a small group of people that have been selected to represent the interests of all Alaska anglers. So it is very important that we hear from you. The entire survey should only take you about 10 minutes to complete.

In appreciation for your help, our project manager, Southwest Associates, Inc., will enter the names of all those who return a completed survey into a drawing for a \$1,000 gift certificate redeemable at a local sporting goods retailer of your choice. When you have completed the survey, please return it in the enclosed postage-paid envelope. If you prefer, you can take the survey online at TO BE DETERMINED. Your user code for the online survey is XXXXXX.

The information you provide will be kept confidential and will only be used by ADFG and the project manager, Southwest Associates, Inc. (www.SouthwestAssociates.com) to produce summary statistics of the economic significance of sport fishing in Alaska. If you have any questions, comments or concerns about the study, you may contact the project manager, Bill Romberg, at 907-586-1330, or by e-mail at william.romberg@alaska.gov.

Thank you for your help and participation!

Please return the survey in the self-addressed, postage paid envelope. Even if you did not fish, your returned survey is very important to us.

By returning your completed survey, you are automatically entered into a drawing for a \$1,000 gift certificate redeemable at a local sporting goods retailer of your choice!

We wish you the best of success and safety in your future fishing efforts!

STATE OF ALASKA

DEPARTMENT OF FISH AND GAME

OFFICE OF THE COMMISSIONER

SARAH PALIN, GOVERNOR

P.O. BOX 115526
JUNEAU, AK 99811-5526
PHONE (907) 465-4100
FAX (907) 465-2332

{DATE}

Dear Alaska angler:

You have been selected to participate in a study aimed at measuring the economic significance of sport fishing in Alaska. You were selected to be part of this study as a result of having purchased an Alaska sport fishing license in 2007. Even if you did not fish in Alaska last year or do not really care about these issues, we would still like to hear from you. You are one of a small group of people that have been selected to represent the activities of all Alaskan anglers, so it is very important that we hear from you. The entire survey should only take you about 10 minutes to complete.

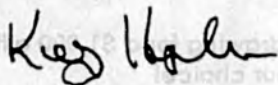
In appreciation for your help, our project contractor, Southwick Associates, Inc. will enter the names of all those who return a completed survey into a drawing for a \$1,000 gift certificate redeemable at a local sporting goods retailer of your choice.

When you have completed the survey, please return it in the enclosed postage-paid envelope. If you prefer, you can take the survey online at [TO BE DETERMINED]. Your user code for the online survey is XXYZZZ.

The information you provide will be kept confidential and will only be used by ADF&G and the project contractor, Southwick Associates, Inc. (www.SouthwickAssociates.com) to produce summary estimates of the economic significance of sport fishing in Alaska. If you have any questions, comments or concerns about the study, you may contact the project manager, Bill Romberg, at 907-267-2366, or by e-mail at william.romberg@alaska.gov.

I'd like to thank you again for agreeing to participate in this important study.

Sincerely,



Kelly Hepler,
Director,
Division of Sport Fish

STATE OF ALASKA

SARAH PALIN, GOVERNOR

DEPARTMENT OF FISH AND GAME

OFFICE OF THE COMMISSIONER

P.O. BOX 115526
JUNEAU, AK 99811-5526
PHONE (907) 465-4100
FAX (907) 465-2332

{Date}

Dear Alaska Angler,

In July, we sent you a survey about your sportfishing activities in Alaska during the first six months of 2007. Many of the other anglers who received the survey have already responded, but we have not yet received your completed questionnaire. The Alaska Department of Fish and Game is conducting the survey to better understand the economic importance of sportfishing to the state's economy. Information about your experience is very valuable to this study because you have been chosen to represent many other sport anglers in Alaska. Therefore, it is very important that we hear from you.

Enclosed is a replacement questionnaire. Please take a few minutes to respond to the survey and return it in the postage-paid envelope. If you prefer, you can take the survey online at www.southwickassociates.com/alaskasurvey. Your user code for the online survey is XXYYZZ. *Your responses to the survey questions will be kept strictly confidential* and will only be used by the research team to develop statistically-valid estimates of economic activity associated with sportfishing in Alaska.

In appreciation for your help, our project contractor, Southwick Associates, Inc. will enter the names of all those who return a completed survey into a drawing for a \$1,000 gift certificate redeemable at a local sporting goods retailer of your choice.

If you have any questions about the survey, you may contact the project manager, Bill Romberg, at 907-267-2366, or by e-mail at william.romberg@alaska.gov.

I'd like to thank you again for agreeing to participate in this important study.

Sincerely,



Charlie O. Swanton
Director,
Division of Sport Fish

STATE OF ALASKA

DEPARTMENT OF FISH AND GAME

OFFICE OF THE COMMISSIONER

SARAH PALIN, GOVERNOR

P.O. BOX 115526
JUNEAU, AK 99811-5526
PHONE (907) 465-4100
FAX (907) 465-2332

{Date}

Dear Alaska Angler,

Approximately four weeks ago, we sent you a second questionnaire as part of our study to learn about sportfishing activities in Alaska. So far, we have received responses from many of the other anglers who were sent the survey, but your completed questionnaire has not been returned. We are sending you another questionnaire since it is important that we obtain information from as many people in our sample as possible. Because your fishing experiences and expenditures are representative of many other anglers, the information that you provide will be invaluable for making an accurate assessment of sportfishing's economic impact to the state. Please take a few minutes to complete the survey and return it in the postage-paid envelope. If you prefer, you can take the survey online at www.southwickassociates.com/alaskasurvey. Your user code for the online survey is XXYZZZ.

We realize that confidentiality is important to you, and it is important to us. *Your survey will not be shared with anyone outside of the research team.*

Upon receiving your completed survey, our project contractor, Southwick Associates, Inc. will enter your name into a drawing for a \$1,000 gift certificate to be used at a local sporting goods store of your choice. If you have any questions about the survey, you may contact the project manager, Bill Romberg, at 907-267-2366, or by e-mail at william.romberg@alaska.gov.

I'd like to thank you again for agreeing to participate in this important study.

Sincerely,



Charlie O. Swanton
Director,
Division of Sport Fish



Alaska Sportfishing Economic Survey

Completing the survey online* or by mail will enter your name into a drawing for a \$1,000 gift certificate redeemable at the local sporting-goods retailer of your choice.

INTRODUCTION: Thank you for participating in this survey. The purpose of the survey is to quantify the economic contributions of sportfishing to Alaska's economy. "Sportfishing" is defined as the taking of fish and shellfish (clams, crabs, shrimp, etc.) under an Alaska sportfishing license and regulations, including personal use fishing (e.g. dipnetting). Please do not report activities and expenditures associated with subsistence fishing, which is defined as the taking or possession of fish, shellfish, or other fisheries resources for subsistence uses.

APPENDIX B: WAVE II RESIDENT SURVEY MATERIALS

Wave II – Resident Survey

- Questionnaire
- 1st mailing cover letter
- 2nd mailing cover letter
- 3rd mailing cover letter

MAY 1 st thru JUNE 30 th 2007		Region A	Region B	Region C	Region D	Region E	Region F
Saltwater days							
Freshwater days							
JULY 1 st thru OCTOBER 31 st 2007		Region A	Region B	Region C	Region D	Region E	Region F
Saltwater days							
Freshwater days							

*If you prefer to take this survey online, please refer to the enclosed letter for your unique access code and web link.

-continued-

Appendix B1 - Page 2 of 8



Alaska Sportfishing Economic Survey

Completing the survey online* or by mail will enter your name into a drawing for a \$1,000 gift certificate redeemable at the local sporting-goods retailer of your choice!

INTRODUCTION: Thank you for participating in this survey. The purpose of the survey is to quantify the economic contributions of sportfishing to Alaska's economy. "Sportfishing" is defined as the taking of fish and shellfish (clams, crabs, shrimp, etc) under an Alaska sportfishing license and regulations, including personal use fishing (e.g. dipnetting). Please do not report activities and expenditures associated with subsistence fishing, which is defined as the taking or possession of fish, shellfish, or other fisheries resources for subsistence uses.

Section A – GENERAL: In this section, we are interested in learning some general information about your sportfishing activities in Alaska.

1. Did you buy an Alaska sportfishing license in 2007 primarily to go personal use fishing (e.g., dipnetting, gill netting, etc.)?

☐ Yes ☐ No

2. As best as possible, please report the number of days you went sportfishing in Alaska during November and December, 2006. (Enter "0" if you did not fish in this period.)

Number of saltwater fishing days _____ Number of freshwater fishing days _____

3. As best as possible, please report the number of days you went freshwater or saltwater fishing in each region of Alaska from May through June and from July through October, 2007. See the enclosed map for the locations of the regions. (Enter "0" if you did not fish in a region. If you did not do any sport fishing between May 1st and October 31st of this year, then skip to Section C on page 6.)

MAY 1 st thru JUNE 30 th 2007	Region A	Region B	Region C	Region D	Region E	Region F
Freshwater days.....						
Saltwater days.....					No Saltwater in Region E	
JULY 1 st thru OCTOBER 31 st 2007	Region A	Region B	Region C	Region D	Region E	Region F
Freshwater days.....						
Saltwater days.....					No Saltwater in Region E	

*If you prefer to take this survey online, please refer to the enclosed letter for your unique access code and web link.

-continued-

Section B1 – LAST TIME YOU WENT SPORTFISHING IN MAY THRU JUNE: Now we would like to know about the last time you went sportfishing in Alaska between May 1st and June 30th, 2007. Please remember, "sportfishing" includes personal use (e.g., dipnetting) and clamming/shellfish harvesting (e.g., crabs, shrimps), but does not include subsistence fishing.

ALL OF THESE QUESTIONS REFER TO THE LAST TIME YOU WENT SPORTFISHING IN ALASKA

***** BETWEEN MAY 1ST AND JUNE 30TH, 2007 *****

4. When was the last time you went sportfishing in Alaska between MAY 1st AND JUNE 30th, 2007? (Check one.)

☐ May

☐ June

☐ I did not fish between May 1st and June 30th (Skip to section B2, page 4)

5. 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 MAY thru JUNE 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: _____

6. How many days did you actually fish during this last time that you went fishing in Alaska between MAY 1st AND JUNE 30th? (Count partial days of fishing as "1" day).

Number of days actually fished: _____

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

☐ Yes

☐ No

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

☐ rod & reel sportfishing

☐ dipnetting (personal use)

☐ shellfish fishing

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

☐ in freshwater

☐ in saltwater

☐ in both freshwater & saltwater

10. Did you pay for a guide or a charter boat on this trip? (check one)

☐ Yes

☐ No

11. Where did this trip occur? Please refer to the map included with this survey. (Check all that apply.)

☐ Region A

☐ Region B

☐ Region C

☐ Region D

☐ Region E

☐ Region F

12. Which species did you target the last time you went sportfishing in Alaska between **MAY 1ST** and **JUNE 30TH, 2007**? Please note the species you targeted may not necessarily be the fish actually caught on your trip. (Check all that apply.)

- | | |
|--|---|
| ☐ King Salmon (Chinook) | ☐ Steelhead |
| ☐ Silver Salmon (Coho) | ☐ Trout (rainbow, cutthroat, lake trout, etc.) |
| ☐ Red Salmon (Sockeye) | ☐ Halibut |
| ☐ Other Salmon (Pink, Chum) | ☐ Shellfish (clams, crab, shrimp, etc.) |
| ☐ Other freshwater (Dolly Varden, char, burbot, Arctic grayling, northern pike, sheefish, etc.) | ☐ Other saltwater (lingcod, rockfish, shark, etc.) |

TRIP RELATED SPENDING IN MAY THRU JUNE

13. As best as possible, please tell us how much you spent and where you bought the following TRIP-RELATED items **ON THE FISHING TRIP DESCRIBED ABOVE**. Please write in the amount you spent and, referring to the included map, please circle the letter of the region or regions where you made the purchase(s). We will ask about your equipment purchases in later questions.

Items purchased on last trip (between MAY 1 ST AND JUNE 30 TH , 2007).	Total Amount Spent	Region or regions where you bought the item(s)
EXAMPLE:	\$ 25	A (B) C D (E) F
Licenses and stamps.....	\$	A B C D E F
Fuel and oil for your car, RV, boat, airplane, etc.....	\$	A B C D E F
Guide and charter fees.....	\$	A B C D E F
Airline tickets.....	\$	A B C D E F
Commercial transportation (air taxi, ferry, shuttle, etc.).....	\$	A B C D E F
Fish processing & shipping.....	\$	A B C D E F
Rentals (boats, equipment, autos, etc.).....	\$	A B C D E F
Derby tickets.....	\$	A B C D E F
Boat launch and dockage fees.....	\$	A B C D E F
Ice.....	\$	A B C D E F
Bait (natural bait only, do not include lures).....	\$	A B C D E F
Groceries, food, liquor bought in stores.....	\$	A B C D E F
Restaurants, bars, and take-out food purchases.....	\$	A B C D E F
Overnight lodging (hotels, campgrounds, cabins).....	\$	A B C D E F
Souvenirs and gifts.....	\$	A B C D E F
Other entertainment expenses during fishing trip.....	\$	A B C D E F
Other (please specify):.....	\$	A B C D E F

Section B2 – LAST TIME YOU WENT SPORTFISHING IN JULY THRU OCTOBER: In this section, we would like to know about the last time you went sportfishing in Alaska between July 1st and October 31st, 2007. Please remember, "sportfishing" includes personal use (e.g., dipnetting) and clamming/shellfish fishing including crab, but does not include subsistence fishing.

ALL OF THESE QUESTIONS REFER TO THE LAST TIME YOU WENT SPORTFISHING IN ALASKA

***** BETWEEN July 1st AND October 31st, 2007 *****

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

20. Did you pay for a guide or a charter boat on this trip? (check one)

☐ Yes

☐ No

21. Where did this trip occur? Please refer to the map included with this survey. (Check all that apply.)

☐ Region A

☐ Region B

☐ Region C

☐ Region D

☐ Region E

☐ Region F

22. Which species did you target the last time you went sportfishing in Alaska between JULY 1ST AND OCTOBER 31ST, 2007? Please note the species you targeted may not necessarily be the fish actually caught on your trip. (Check all that apply.)

- | | |
|--|---|
| ☐ King Salmon (Chinook) | ☐ Steelhead |
| ☐ Silver Salmon (Coho) | ☐ Trout (rainbow, cutthroat, lake trout, etc.) |
| ☐ Red Salmon (Sockeye) | ☐ Halibut |
| ☐ Other Salmon (Pink, Chum) | ☐ Shellfish (clams, crab, shrimp, etc.) |
| ☐ Other freshwater (Dolly Varden, char, burbot, Arctic grayling, northern pike, sheefish, etc.) | ☐ Other saltwater (lingcod, rockfish, shark, etc.) |

TRIP RELATED SPENDING IN JULY THRU OCTOBER

23. As best as possible, please tell us how much you spent and where you bought the following TRIP-RELATED items ON THE TRIP DESCRIBED ABOVE. Please write in the amount you spent and, referring to the included map, please circle the letter of the region or regions where you made the purchase(s). We will ask about your equipment purchases in later questions.

Items purchased on last trip (between JULY 1 ST AND OCTOBER 31 ST , 2007).	Total Amount Spent	Region or regions where you bought the item(s)
EXAMPLE:	\$ 25	A (B) C D (E) F
Licenses and stamps	\$	A B C D E F
Fuel and oil for your car, RV, boat, airplane, etc.	\$	A B C D E F
Guide and charter fees	\$	A B C D E F
Airline tickets	\$	A B C D E F
Commercial transportation (air taxi, ferry, shuttle, etc.)	\$	A B C D E F
Fish processing & shipping	\$	A B C D E F
Rentals (boats, equipment, autos, etc.)	\$	A B C D E F
Derby tickets	\$	A B C D E F
Boat launch and dockage fees	\$	A B C D E F
Ice	\$	A B C D E F
Bait (natural bait only, do not include lures)	\$	A B C D E F
Groceries, food, liquor bought in stores	\$	A B C D E F
Restaurants, bars, and take-out food purchases	\$	A B C D E F
Overnight lodging (hotels, campgrounds, cabins)	\$	A B C D E F
Souvenirs and gifts	\$	A B C D E F
Other entertainment expenses during fishing trip	\$	A B C D E F
Other (please specify):	\$	A B C D E F

Section C. FISHING EQUIPMENT EXPENDITURES: In this section, we want to know about sportfishing and related equipment you bought IN ALASKA during the last 12 months, including equipment purchased for personal use (e.g., dipnet) and/or shellfish fishing.

24. As best as possible, please tell us how much **YOU** spent and **where** you bought the following fishing equipment and fishing related gear in the last 12 months. Only report purchases made in Alaska – exclude purchases from catalogs and web sites of out-of-state companies. Include purchases YOU made for yourself and for others. Write in the amount spent and, referring to the included map, circle the letter of the region or regions where you made the purchase(s). Since some items can be used for non-fishing activities, please estimate the percentage that the purchased fishing related gear is used for sportfishing.

	Total amount spent	Region or regions where you bought the item(s)	% Used for sport fishing:
EXAMPLE: Clothing	\$ 40	A (B) C (D) E F	65 %
FISHING EQUIPMENT:			
Licenses and stamps	\$	A B C D E F	100 %
Rods, reels, & components	\$	A B C D E F	100 %
Fishing tackle (lines, leaders, lures, creels, stringers etc)	\$	A B C D E F	100 %
Tackle boxes, cases to protect fishing equipment	\$	A B C D E F	100 %
Depth finders, fish finders, other electronics	\$	A B C D E F	100 %
Landing nets, dipnets & gillnets	\$	A B C D E F	100 %
Miscellaneous fishing equipment (knives, scales, etc.)	\$	A B C D E F	100 %
Shellfish fishing equipment (shovels, pots, buckets, etc.)	\$	A B C D E F	100 %
Fish mounting (taxidermy)	\$	A B C D E F	100 %
Books and magazines devoted to fishing	\$	A B C D E F	100 %
FISHING-RELATED GEAR OR OTHER NON-FISHING PURCHASES:			
Items to store/preserve fish (smoker, vacuum sealer, etc.)	\$	A B C D E F	%
Coolers, fish boxes	\$	A B C D E F	%
Clothing (fishing vest, raingear, head net, etc.)	\$	A B C D E F	%
Boots, shoes, waders and other footwear	\$	A B C D E F	%
Life jackets, survival suits or other PFDs	\$	A B C D E F	%
Boats, canoes, rafts, kayaks and other watercraft	\$	A B C D E F	%
Boat motors	\$	A B C D E F	%
Trailers, hitches, and accessories	\$	A B C D E F	%
Other boat parts and accessories	\$	A B C D E F	%
Bear spray, bug spray, sun screen	\$	A B C D E F	%
Firearms for personal protection	\$	A B C D E F	%
Cameras, binoculars, sun glasses	\$	A B C D E F	%
Tents, screen rooms, tarps, backpacks, sleeping bags	\$	A B C D E F	%
Camping trailer (pop-up, self-contained, 5 th wheel)	\$	A B C D E F	%
Other camping equipment (stoves, grills, lanterns, etc.)	\$	A B C D E F	%
Vehicles (trucks, SUVs, motorhomes, etc.)	\$	A B C D E F	%
Airplanes and related equipment	\$	A B C D E F	%
ATVs, snowmachines	\$	A B C D E F	%
Boat/camper registrations and excise taxes	\$	A B C D E F	%
Vehicle, boat or airplane repair/maintenance	\$	A B C D E F	%
Other, including non-fishing related purchases (please specify):	\$	A B C D E F	%

25. Please report how much you spent **IN THE PAST 12 MONTHS** related to any Alaska real estate that was purchased or used **primarily for sportfishing purposes**.

	Amount spent	Please circle where the property is located
EXAMPLE: Maintenance and repairs.....	\$ 2,500	A B C D E F
Expenses related to real estate owned or shared for fishing (including mortgage payments, insurance, property taxes, etc.)	\$	A B C D E F
Expenses related to land, cabins and/or other real estate property leased or rented for fishing, including boat slips and storage	\$	A B C D E F
Maintenance and repairs to real estate property	\$	A B C D E F
Construction of cabins, sheds, and other buildings	\$	A B C D E F

Section D. BACKGROUND INFORMATION: To help us learn more about who fishes in Alaska, please answer these final questions. All answers you provide will be kept fully confidential. Your answers will help ensure that the survey represents ALL Alaska anglers, even those not surveyed.

26. In which region is your primary residence? (Please use the map included with this survey -- *check one*)

- ☐ Region A
 ☐ Region B
 ☐ Region C
☐ Region D
 ☐ Region E
 ☐ Region F

27. What is your gender?

- ☐ Male
 ☐ Female

28. What year were you born?

19_____

29. Which category best describes the highest level of education you have completed? (*Check one*)

- ☐ Did not graduate from high school
☐ High school graduate or GED
☐ 1-3 years college (some college)
☐ College graduate (bachelor degree or equivalent)
☐ Postgraduate, master's degree, doctorate, law degree, other professional degree

30. Which best describes your household's annual, before-tax income? (*Check one*)

- ☐ Less than \$9,999
 ☐ \$60,000 - \$69,999
☐ \$10,000 - \$19,999
 ☐ \$70,000 - \$79,999
☐ \$20,000 - \$29,999
 ☐ \$80,000 - \$89,999
☐ \$30,000 - \$39,999
 ☐ \$90,000 - \$99,999
☐ \$40,000 - \$49,999
 ☐ \$100,000 - \$249,999
☐ \$50,000 - \$59,999
 ☐ \$250,000 or more

31. How satisfied are you with your overall sportfishing experiences in Alaska in 2007? (Check one.)

☐
Very
Dissatisfied

☐
Generally
Dissatisfied

☐
Neutral

☐
Generally
Satisfied

☐
Very
Satisfied

If you have any additional comments you wish to share about this study please provide them here:

(DATE) _____
Don Alaskan Angler

You have been selected to participate in a study aimed at measuring the economic significance of sport fishing in Alaska. You were selected to be part of this study as a result of having purchased an Alaska sport fishing license in 2007. Even if you did not fish in Alaska this year or do not really care about these issues, we would still like to learn from you. You are one of a small group of people that have been selected to represent the activities of all Alaskan anglers, so it is very important that we hear from you.

In appreciation for your help, our project contractor, Southwick Associates, Inc. will enter the names of all those who return a completed survey into a drawing for a \$1,000 gift certificate redeemable at a local sporting goods retailer of your choice.

When you have completed the survey, please return it in the enclosed postage-paid envelope. If you prefer, you can take the survey online at www.southwickassociates.com/alaskasurvey. Your user code for the online survey is XXXVXX.

The information you provide will be kept confidential and will only be used by ADF&G and the project contractor, Southwick Associates, Inc. (www.southwickassociates.com) to produce summary estimates of the economic significance of sport fishing in Alaska. If you have any questions, comments or concerns about the study, you may contact the project manager, Bill Homberg, at 907-267-2366, or by e-mail at william.homberg@alaska.gov.

Thank you again for agreeing to participate in this important study.

Thank you for your help and participation!

Please return the survey in the self-addressed, postage paid envelope. Even if you did not fish, your returned survey is very important to us.

We wish you the best of success and safety in your future fishing efforts!

STATE OF ALASKA

DEPARTMENT OF FISH AND GAME

OFFICE OF THE COMMISSIONER

SARAH PALIN, GOVERNOR

P.O. BOX 115526
JUNEAU, AK 99811-5526
PHONE (907) 465-4100
FAX (907) 465-2332

{DATE}

Dear Alaska Angler:

You have been selected to participate in a study aimed at measuring the economic significance of sport fishing in Alaska. You were selected to be part of this study as a result of having purchased an Alaska sport fishing license in 2007. Even if you did not fish in Alaska this year or do not really care about these issues, we would still like to hear from you. You are one of a small group of people that have been selected to represent the activities of all Alaskan anglers, so it is very important that we hear from you.

In appreciation for your help, our project contractor, Southwick Associates, Inc. will enter the names of all those who return a completed survey into a drawing for a \$1,000 gift certificate redeemable at a local sporting goods retailer of your choice.

When you have completed the survey, please return it in the enclosed postage-paid envelope. If you prefer, you can take the survey online at www.southwickassociates.com/alaskasurvey. Your user code for the online survey is XXYZZZ.

The information you provide will be kept confidential and will only be used by ADF&G and the project contractor, Southwick Associates, Inc. (www.SouthwickAssociates.com) to produce summary estimates of the economic significance of sport fishing in Alaska. If you have any questions, comments or concerns about the study, you may contact the project manager, Bill Romberg, at 907-267-2366, or by e-mail at william.romberg@alaska.gov.

Thank you again for agreeing to participate in this important study.

Sincerely,



Charlie O. Swanton
Director, Division of Sport Fish

Thank you for your help and participation.

We wish you the best of success and safety in your future fishing efforts.
Your returned survey is very important to us.
Please return the survey in the self-addressed, postage paid envelope. Even if you did not fish.

STATE OF ALASKA

SARAH PALIN, GOVERNOR

DEPARTMENT OF FISH AND GAME

OFFICE OF THE COMMISSIONER

P.O. BOX 115526
JUNEAU, AK 99811-5526
PHONE (907) 465-4100
FAX (907) 465-2332

{Date}

Dear Alaska Angler,

In November, we sent you a survey about your sportfishing activities in Alaska during May through October of 2007. Many of the other anglers who received the survey have already responded, but we have not yet received your completed questionnaire.

The Alaska Department of Fish and Game is conducting the survey to better understand the economic importance of sportfishing to the state's economy. Information about your experience is very valuable to this study because you have been selected at random to represent many other sport anglers in Alaska.

Therefore, it is very important that we hear from you.

Enclosed is a replacement questionnaire. Please take a few minutes to respond to the survey and return it in the postage-paid envelope. If you prefer, you can take the survey online at www.southwickassociates.com/alaskasurvey1. Your user code for the online survey is XXYZZZ.

Your responses to the survey questions will be kept strictly confidential and will only be used by the research team to develop statistically-valid estimates of economic activity associated with sportfishing in Alaska.

In appreciation for your help, our project contractor, Southwick Associates, Inc. will enter the names of all those who return a completed survey into a drawing for a \$1,000 gift certificate redeemable at a local sporting goods retailer of your choice.

If you have any questions about the survey, you may contact the project manager, Bill Romberg, at 907-267-2366, or by e-mail at william.romberg@alaska.gov.

I'd like to thank you again for agreeing to participate in this important study.

Sincerely,



Charlie O. Swanton
Director, Sport Fish Division

STATE OF ALASKA

DEPARTMENT OF FISH AND GAME

OFFICE OF THE COMMISSIONER

SARAH PALIN, GOVERNOR

P.O. BOX 11,5526
JUNEAU, AK 99811-5526
PHONE (907) 465-4100
FAX (907) 465-2332

{Date}

Dear Alaska Angler,

Approximately four weeks ago, we sent you a second questionnaire as part of our study to learn about sportfishing activities in Alaska. So far, many of the other anglers who were sent the survey have returned a completed questionnaire, but we have not yet received yours.

We are sending you another questionnaire because it is important that we obtain information from as many people in our sample as possible. Your fishing experiences and expenditures are representative of many other anglers, therefore the information that you provide will be invaluable for making an accurate assessment of sportfishing's economic impact to the state.

Please take a few minutes to complete the survey and return it in the postage-paid envelope. If you prefer, you can take the survey online at www.southwickassociates.com/alaskasurvey1. Your user code for the online survey is XXYZZZ.

We realize that confidentiality is important to you, and it is important to us. *Your survey will not be shared with anyone outside of the research team.*

Upon receiving your completed survey, our project contractor, Southwick Associates, Inc. will enter your name into a drawing for a \$1,000 gift certificate to be used at a local sporting goods store of your choice. If you have any questions about the survey, you may contact the project manager, Bill Romberg, at 907-267-2366, or by e-mail at william.romberg@alaska.gov.

I'd like to thank you again for agreeing to participate in this important study.

Sincerely,



Charlie O. Swanton
Director, Sport Fish Division



Alaska Sportfishing Economic Survey

Completing the survey online, or by mail will enter your name into a drawing for a \$1,000 gift certificate redeemable at the local sporting-goods retailer of your choice.

INTRODUCTION: Thank you for participating in this survey. The purpose of the survey is to quantify the economic contributions of sportfishing to Alaska's economy. "Sportfishing" is defined as the taking of fish and shellfish (clams, crabs, shrimp, etc.) under an Alaska sportfishing license and regulations.

APPENDIX C: WAVE II NONRESIDENT SURVEY MATERIALS

Wave II – Nonresident Survey

- Questionnaire

- 1st mailing cover letter

- 2nd mailing cover letter

- 3rd mailing cover letter

- Foreign respondent postcard

2. As best as possible, please record the number of days you went freshwater or saltwater fishing in each region of Alaska from May through June and from July through October 2007. See the enclosed map for the locations of the regions. (Enter "0" if you did not fish in a region. If you did not fish in any region between May 1st and October 31st of this year, then skip to Section C on page 6.)

MAY 1 st thru JUNE 30 th 2007		JULY 1 st thru OCTOBER 31 st 2007	
Region A	Region B	Region A	Region B
Region C	Region D	Region C	Region D
Region E	Region F	Region E	Region F
Freshwater days	Freshwater days	Freshwater days	Freshwater days
Saltwater days	Saltwater days	Saltwater days	Saltwater days

If you prefer to take this survey online, please refer to the enclosed letter for your unique access code and web link.

-continued-



Alaska Sportfishing Economic Survey

Completing the survey online* or by mail will enter your name into a drawing for a \$1,000 gift certificate redeemable at the local sporting-goods retailer of your choice!

INTRODUCTION: Thank you for participating in this survey. The purpose of the survey is to quantify the economic contributions of sportfishing to Alaska's economy. "Sportfishing" is defined as the taking of fish and shellfish (clams, crabs, shrimp, etc) under an Alaska sportfishing license and regulations.

Section A – GENERAL: In this section, we are interested in learning some general information about your sportfishing activities in Alaska.

1. As best as possible, please report the number of days you went sportfishing in Alaska for each of the two time periods listed below. (Please enter "0" if you did not fish in this period.)

	Number of saltwater fishing days:	Number of freshwater fishing days:
November through December, <u>2006</u> :		
January through April, <u>2007</u>		

2. As best as possible, please report the number of days you went freshwater or saltwater fishing in each region of Alaska from May through June and from July through October, 2007. See the enclosed map for the locations of the regions. (Enter "0" if you did not fish in a region. If you did not do any sport fishing between May 1st and October 31st of this year, then skip to Section C on page 6.)

MAY 1 st thru JUNE 30 th 2007	Region A	Region B	Region C	Region D	Region E	Region F
Freshwater days.....						
Saltwater days.....					No Saltwater in Region E	
JULY 1 st thru OCTOBER 31 st 2007	Region A	Region B	Region C	Region D	Region E	Region F
Freshwater days.....						
Saltwater days.....					No Saltwater in Region E	

*If you prefer to take this survey online, please refer to the enclosed letter for your unique access code and web link.

-continued-

Section B1 – LAST TIME YOU WENT SPORTFISHING IN MAY THRU JUNE: Now we would like to know about your last trip to Alaska between May 1st and June 30th, 2007 in which you went fishing.

ALL OF THESE QUESTIONS REFER TO YOUR LAST TRIP IN ALASKA

DURING WHICH YOU FISHED AT LEAST ONCE

***** BETWEEN MAY 1ST AND JUNE 30TH, 2007 *****

3. When was the last time you went sportfishing in Alaska between MAY 1st AND JUNE 30th, 2007?

(Check one.)

☐ May

☐ June

☐ I did not fish between May 1st and June 30th (Skip to section B2, page 4)

4. How long was this trip to Alaska including fishing days, travel days and non-fishing days?

Total number of days involved in last trip to Alaska (that included fishing): _____ days

5. How many days did you actually fish during this last trip to Alaska between MAY 1st AND JUNE 30th?

(Count partial days of fishing as "1" day).

Number of days actually fished: _____ days

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

☐ Yes

☐ No

7. Was your fishing during this trip primarily... (check one)

☐ rod & reel sportfishing

☐ shellfish fishing

8. Was your fishing during this trip primarily... (check one)

☐ in freshwater

☐ in saltwater

☐ in both freshwater & saltwater

9. Did you pay for a guide or a charter boat at any time during this trip? (check one)

☐ Yes

☐ No

10. Where did you fish during this trip? Please refer to the map included with this survey. (Check all that apply.)

☐ Region A

☐ Region B

☐ Region C

☐ Region D

☐ Region E

☐ Region F

11. Which species did you target during your last trip to Alaska between MAY 1ST and JUNE 30TH, 2007?
Please note the species you targeted may not necessarily be the fish actually caught on your trip.
(Check all that apply.)

- | | | |
|--|---|--|
| ☐ King Salmon (Chinook) | ☐ Steelhead | ☐ Halibut |
| ☐ Silver Salmon (Coho) | ☐ Trout (all types) | ☐ Shellfish (clams, shrimp, etc) |
| ☐ Red Salmon (Sockeye) | ☐ Other freshwater (char, Dolly Varden, butbot, pike, sheefish, etc) | ☐ Other saltwater fish (lingcod, rockfish, shark, etc.) |
| ☐ Other Salmon (Pink, Chum) | | |

12. TRAVEL PACKAGE SPENDING: As best as possible, please tell us how much you spent PRIOR TO DEPARTING ON YOUR TRIP for any pre-purchased travel packages such as cruises, travel tours, guided trips, etc. Referring to the included map, please circle the letter of the region(s) you visited as part of your trip. (Enter "0" if none.)

	Total cost	Region or regions you visited
EXAMPLE:	\$ 2500	A B <u>C</u> D E F
Pre-arranged cruise, package tour or chartered trip (including fishing excursions purchased through a cruise line)	\$	A B C D E F
Which of the following were included in the pre-arranged package:		
Transportation to or from Alaska	☐ Yes ☐ No	Do not include any of these expenditures when completing question #13 below
Transportation once you arrived in Alaska	☐ Yes ☐ No	
Fishing guides &/or charter boats	☐ Yes ☐ No	
Lodging (mark "yes" if you were on a cruise)	☐ Yes ☐ No	
Meals	☐ Yes ☐ No	
Fishing License	☐ Yes ☐ No	

13. NON-PACKAGE SPENDING: As best as possible, please tell us how much you spent while in Alaska and where you bought the following TRIP-RELATED items NOT INCLUDED AS PART OF ANY TRAVEL PACKAGE. Please write the amount you spent and, referring to the included map, circle the letter of the region or regions where you made the purchase(s). If you already reported a purchase in question #12 above, please do not report it again below.

	Total amount spent	Region or regions where you bought the item(s)	Purchased outside of Alaska
EXAMPLE:	\$ 250	A <u>B</u> C D E F	☒
Licenses and stamps	\$	A B C D E F	
Fuel and oil for your car, RV, boat, airplane, etc.	\$	A B C D E F	
Guide and charter fees	\$	A B C D E F	
Airline tickets to and from Alaska	\$	A B C D E F	
Commercial travel within Alaska (air, ferry, shuttle, etc.)	\$	A B C D E F	
Fish processing & shipping	\$	A B C D E F	
Rentals (boats, equipment, autos, etc.)	\$	A B C D E F	
Derby tickets	\$	A B C D E F	
Boat launch and dockage fees	\$	A B C D E F	
Bait (natural bait only, do not include lures)	\$	A B C D E F	
Groceries, food, liquor bought in stores	\$	A B C D E F	
Restaurants, bars, and take-out food purchases	\$	A B C D E F	
Overnight lodging (hotels, campgrounds, cabins)	\$	A B C D E F	
Souvenirs and gifts	\$	A B C D E F	
Other entertainment expenses during fishing trip	\$	A B C D E F	
Other (please specify):	\$	A B C D E F	

Section B2 – LAST TIME YOU WENT SPORTFISHING IN JULY THRU OCTOBER: Now we would like to know about your last trip to Alaska between July 1st and October 31st, 2007 in which you went fishing.

ALL OF THESE QUESTIONS REFER TO YOUR LAST TRIP IN ALASKA DURING WHICH YOU FISHED AT LEAST ONCE

***** BETWEEN JULY 1ST AND OCTOBER 31ST, 2007 *****

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. How long was this trip to Alaska including fishing days, travel days and non-fishing days?

Total number of days involved in last trip to Alaska (that included fishing): _____ days

16. How many days did you actually fish during this last trip to Alaska between MAY 1st AND JUNE 30th?

(Count partial days of fishing as "1" day).

Number of days actually fished: _____ days

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

- ☐ Yes ☐ No

18. Was your fishing during this trip primarily... (check one)

- ☐ rod & reel sportfishing ☐ shellfish fishing

19. Was your fishing during this trip primarily... (check one)

- ☐ in freshwater ☐ in saltwater ☐ in both freshwater & saltwater

20. Did you pay for a guide or a charter boat at any time during this trip? (check one)

- ☐ Yes ☐ No

21. Where did you fish during this trip?? Please refer to the map included with this survey. (Check all that apply.)

- ☐ Region A ☐ Region B ☐ Region C
☐ Region D ☐ Region E ☐ Region F

22. Which species did you target during your last trip to Alaska between JULY 1ST AND OCTOBER 31ST 2007? Please note the species you targeted may not necessarily be the fish actually caught on your trip. (Check all that apply.)

- | | | |
|--|---|--|
| ☐ King Salmon (Chinook) | ☐ Steelhead | ☐ Halibut |
| ☐ Silver Salmon (Coho) | ☐ Trout (all types) | ☐ Shellfish |
| ☐ Red Salmon (Sockeye) | ☐ Other freshwater (char, Dolly Varden, butbot, pike, sheefish, etc) | ☐ Other saltwater fish (lingcod, rockfish, shark, etc.) |
| ☐ Other Salmon (Pink, Chum) | | |

23. TRAVEL PACKAGE SPENDING: As best as possible, please tell us how much you spent PRIOR TO DEPARTING ON YOUR TRIP TO ALASKA for any pre-purchased travel packages such as cruises, travel tours, etc. Referring to the included map, please circle the letter of the region(s) you visited as part of your trip. (Enter "0" if none.)

	Total cost	Region or regions you visited
EXAMPLE:	\$ 2500	A B C D E F
Pre-arranged cruise, package tour or chartered trip (including fishing excursions purchased through a cruise line)	\$	A B C D E F
Which of the following were included in the pre-arranged package:		
Transportation to or from Alaska	☐ Yes ☐ No	Do not include any of these expenditures when completing question #24 below
Transportation once you arrived in Alaska	☐ Yes ☐ No	
Fishing guides &/or charter boats	☐ Yes ☐ No	
Lodging & accommodations	☐ Yes ☐ No	
Meals	☐ Yes ☐ No	
Fishing License	☐ Yes ☐ No	

24. NON-PACKAGE SPENDING: As best as possible, please tell us how much you spent while in Alaska and where you bought the following TRIP-RELATED items NOT INCLUDED AS PART OF ANY TRAVEL PACKAGE. Please write in the amount you spent and, referring to the included map, please circle the letter of the region or regions where you made the purchase(s). If you already reported a purchase in question #23 above, please do not report it again below.

	Total amount spent	Region or regions where you bought the item(s)	Purchased outside of Alaska
EXAMPLE:	\$ 250	A B C D E F	✓
Licenses and stamps	\$	A B C D E F	
Fuel and oil for your car, RV, boat, airplane, etc.	\$	A B C D E F	
Guide and charter fees	\$	A B C D E F	
Airline tickets to and from Alaska	\$	A B C D E F	
Commercial travel within Alaska (taxi, ferry, shuttle, etc.)	\$	A B C D E F	
Fish processing & shipping	\$	A B C D E F	
Rentals (boats, equipment, autos, etc.)	\$	A B C D E F	
Derby tickets	\$	A B C D E F	
Boat launch and dockage fees	\$	A B C D E F	
Ice	\$	A B C D E F	
Bait (natural bait only, do not include lures)	\$	A B C D E F	
Groceries, food, liquor bought in stores	\$	A B C D E F	
Restaurants, bars, and take-out food purchases	\$	A B C D E F	
Overnight lodging (hotels, campgrounds, cabins)	\$	A B C D E F	
Souvenirs and gifts	\$	A B C D E F	
Other entertainment expenses during fishing trip	\$	A B C D E F	
Other (please specify):	\$	A B C D E F	

Section C. FISHING EQUIPMENT EXPENDITURES: In this section, we want to know about sportfishing and related equipment you bought IN ALASKA during the last 12 months.

25. As best as possible, please tell us how much YOU spent and where you bought the following fishing equipment and fishing related gear in the last 12 months. Only report purchases made in Alaska - exclude purchases made prior to arriving in Alaska. Include purchases YOU made for yourself and for others. Write in the amount spent and, referring to the included map, circle the letter of the region or regions where you made the purchase(s). Since some items can be used for non-fishing activities, please estimate the percentage that the purchased fishing related gear is used for sportfishing.

	Total amount spent	Region or regions where you bought the item(s)	% Used for sport fishing:
EXAMPLE: Clothing	\$ 40	A B C D E F	65 %
FISHING EQUIPMENT:			
Licenses and stamps	\$	A B C D E F	100 %
Rods, reels, & components	\$	A B C D E F	100 %
Fishing tackle (lines, leaders, lures, creels, stringers etc)	\$	A B C D E F	100 %
Tackle boxes, cases to protect fishing equipment	\$	A B C D E F	100 %
Depth finders, fish finders, other electronics	\$	A B C D E F	100 %
Landing nets, dipnets & gillnets	\$	A B C D E F	100 %
Miscellaneous fishing equipment (knives, scales, etc.)	\$	A B C D E F	100 %
Shellfish fishing equipment (shovels, pots, buckets, etc.)	\$	A B C D E F	100 %
Fish mounting (taxidermy)	\$	A B C D E F	100 %
Books and magazines devoted to fishing	\$	A B C D E F	100 %
FISHING-RELATED GEAR OR OTHER NON-FISHING PURCHASES:			
Items to store/preserve fish (smoker, vacuum sealer, etc.)	\$	A B C D E F	%
Coolers, fish boxes	\$	A B C D E F	%
Clothing (fishing vest, raingear, head net, etc.)	\$	A B C D E F	%
Boots, shoes, waders and other footwear	\$	A B C D E F	%
Life jackets, survival suits or other PFDs	\$	A B C D E F	%
Boats, canoes, rafts, kayaks or other watercraft	\$	A B C D E F	%
Boat motors	\$	A B C D E F	%
Trailers, hitches, and accessories	\$	A B C D E F	%
Other boat parts and accessories	\$	A B C D E F	%
Bear spray, bug spray, sun screen	\$	A B C D E F	%
Firearms for personal protection	\$	A B C D E F	%
Cameras, binoculars, sun glasses	\$	A B C D E F	%
Tents, screen rooms, tarps, backpacks, sleeping bags	\$	A B C D E F	%
Camping trailer (pop-up, self-contained, 5 th wheel)	\$	A B C D E F	%
Other camping equipment (stoves, grills, lanterns, etc.)	\$	A B C D E F	%
Vehicles (trucks, SUVs, motorhomes, etc.)	\$	A B C D E F	%
Airplanes and related equipment	\$	A B C D E F	%
ATVs, snowmachines	\$	A B C D E F	%
Boat/camper registrations and excise taxes	\$	A B C D E F	%
Vehicle, boat or airplane repair/maintenance	\$	A B C D E F	%
Other, including non-fishing related purchases (please specify):	\$	A B C D E F	%

26. Please report how much you spent IN THE PAST 12 MONTHS related to any Alaska real estate that was purchased or used primarily for sportfishing purposes.

	Amount spent	Please circle where the property is located
EXAMPLE: Maintenance and repairs.....	\$ 25,000	A B C D E F
Expenses related to real estate owned or shared for fishing (including mortgage payments, insurance, property taxes, etc.)	\$	A B C D E F
Expenses related to land, cabins and/or other real estate property leased or rented for fishing, including boat slips and storage	\$	A B C D E F
Maintenance and repairs to real estate property	\$	A B C D E F
Construction of cabins, sheds, and other buildings	\$	A B C D E F

Section D. BACKGROUND INFORMATION: To help us learn more about who fishes in Alaska, please answer these final questions. All answers you provide will be kept fully confidential. Your answers will help ensure that the survey represents ALL Alaska anglers, even those not surveyed.

27. What is your gender?

☐ Male

☐ Female

28. What year were you born?

19_____

29. Which category best describes the highest level of education you have completed? (Check one)

☐ Did not graduate from high school

☐ High school graduate or GED

☐ 1-3 years college (some college)

☐ College graduate (bachelor degree or equivalent)

☐ Postgraduate, master's degree, doctorate, law degree, other professional degree

30. Which best describes your household's annual, before-tax income? (Check one)

☐ Less than \$9,999

☐ \$10,000 - \$19,999

☐ \$20,000 - \$29,999

☐ \$30,000 - \$39,999

☐ \$40,000 - \$49,999

☐ \$50,000 - \$59,999

☐ \$60,000 - \$69,999

☐ \$70,000 - \$79,999

☐ \$80,000 - \$89,999

☐ \$90,000 - \$99,999

☐ \$100,000 - \$249,999

☐ \$250,000 or more

31. How satisfied are you with your overall sportfishing experiences in Alaska in 2007? (Check one.)

☐ Very Dissatisfied ☐ Generally Dissatisfied ☐ Neutral ☐ Generally Satisfied ☐ Very Satisfied

If you have any additional comments you wish to share about this study please provide them here:

(DATE) _____
Dear Alaska Angler:

You have been selected to participate in a study aimed at measuring the economic significance of sport fishing in Alaska. You were selected to be part of this study as a result of having purchased an Alaska sport fishing license in 2007. Even if you did not fish in Alaska this year or do not really care about these issues, we would still like to hear from you. You are one of a small group of people that have been selected to represent the views of all anglers who visit Alaska to fish, so it is very important that we receive your completed survey.

In appreciation for your help, our project contractor, Southwick Associates, Inc. will enter the names of all those who return a completed survey into a drawing for a \$1,000 gift certificate redeemable at a local sporting goods retailer of your choice.

When you have completed the survey, please return it in the enclosed postage-paid envelope. If you prefer, you can fax the survey online at www.southwickassociates.com/alaskansurvey. Your next code for the online survey is XXYZZ.

The information you provide will be kept confidential and will only be used by the ADFG and the project contractor, Southwick Associates, Inc. (www.southwickassociates.com) to produce summary estimates of the economic significance of sport fishing in Alaska. If you have any questions, comments or concerns about the study, you may contact the project manager, Bill Komberly, at 907-267-2300, or by e-mail at william.komberly@alaska.gov.

Thank you again for agreeing to participate in this important study.

Sincerely,

Thank you for your help and participation!

Please return the survey in the self-addressed, postage paid envelope. Even if you did not fish, your returned survey is very important to us.

We wish you the best of success and safety in your future fishing efforts!