

Economic Analysis of the Non-Treaty Commercial and Recreational Fisheries in Washington State in 2006

Craig Burley, Inland and Marine Resources
Division Manager, Fish Program

Tom Wegge, TCW Economics

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Governor Christine Gregoire's Request

“To allow us to fully educate the public on the importance of fishing, I would like the Commission to summarize the economic benefit that our commercial and recreational fisheries provide the state. While sustainable fishing practices must be consistent with conservation needs of the fish, both fisheries have an important economic role, particularly in our rural communities.”

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Study Objectives

- ▶ Identify affected fisheries and their beneficiaries
- ▶ Establish conceptual foundation (net economic values and economic impacts)
- ▶ Characterize commercial and sport fishing activity (catch and effort) by species groups
- ▶ Establish statewide net economic values and impacts (jobs, earnings) associated with commercial and sport fisheries

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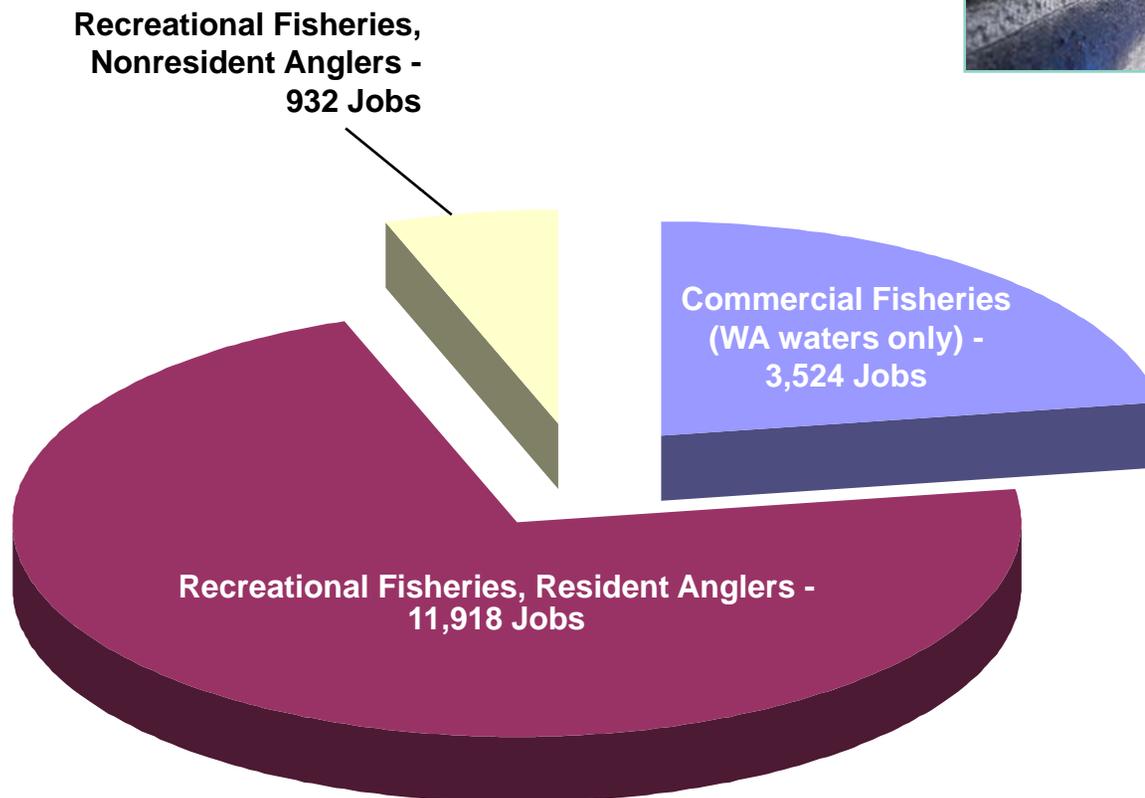
Net Economic Values and Economic Impacts

- ▶ Two widely used but distinctly different measures
- ▶ Net economic values (net profits, angler surplus values) ➡ assess “value added” contributions
- ▶ Economic impacts (jobs, personal income) ➡ assess economic development contributions



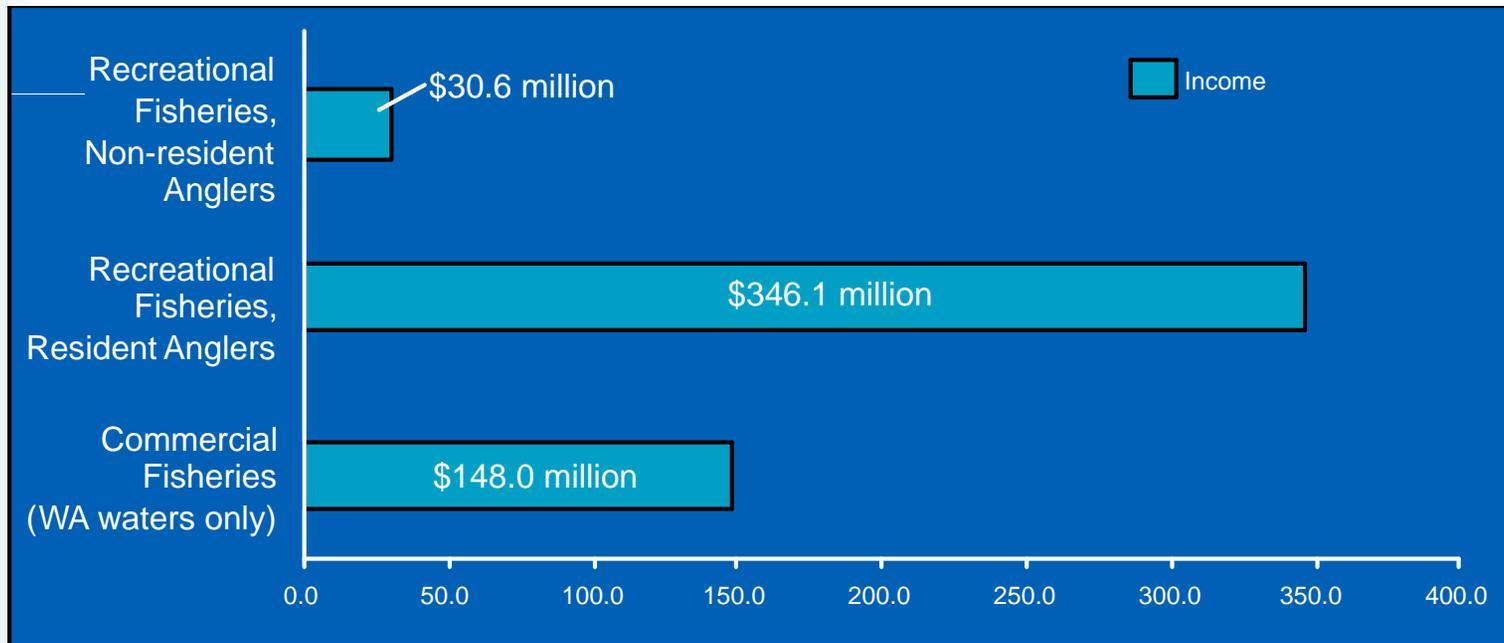
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Economic Impacts – Total Jobs Supported



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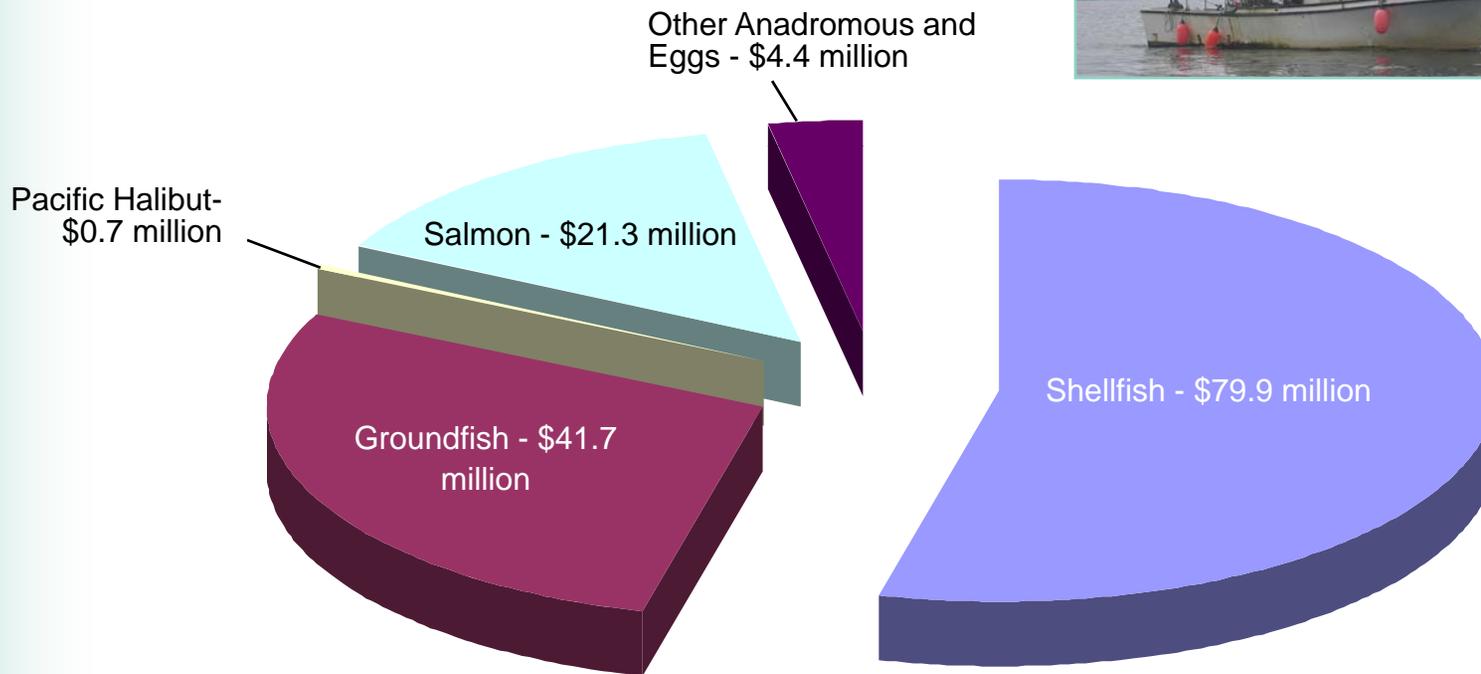
Economic Impacts – Total Personal Income Generated



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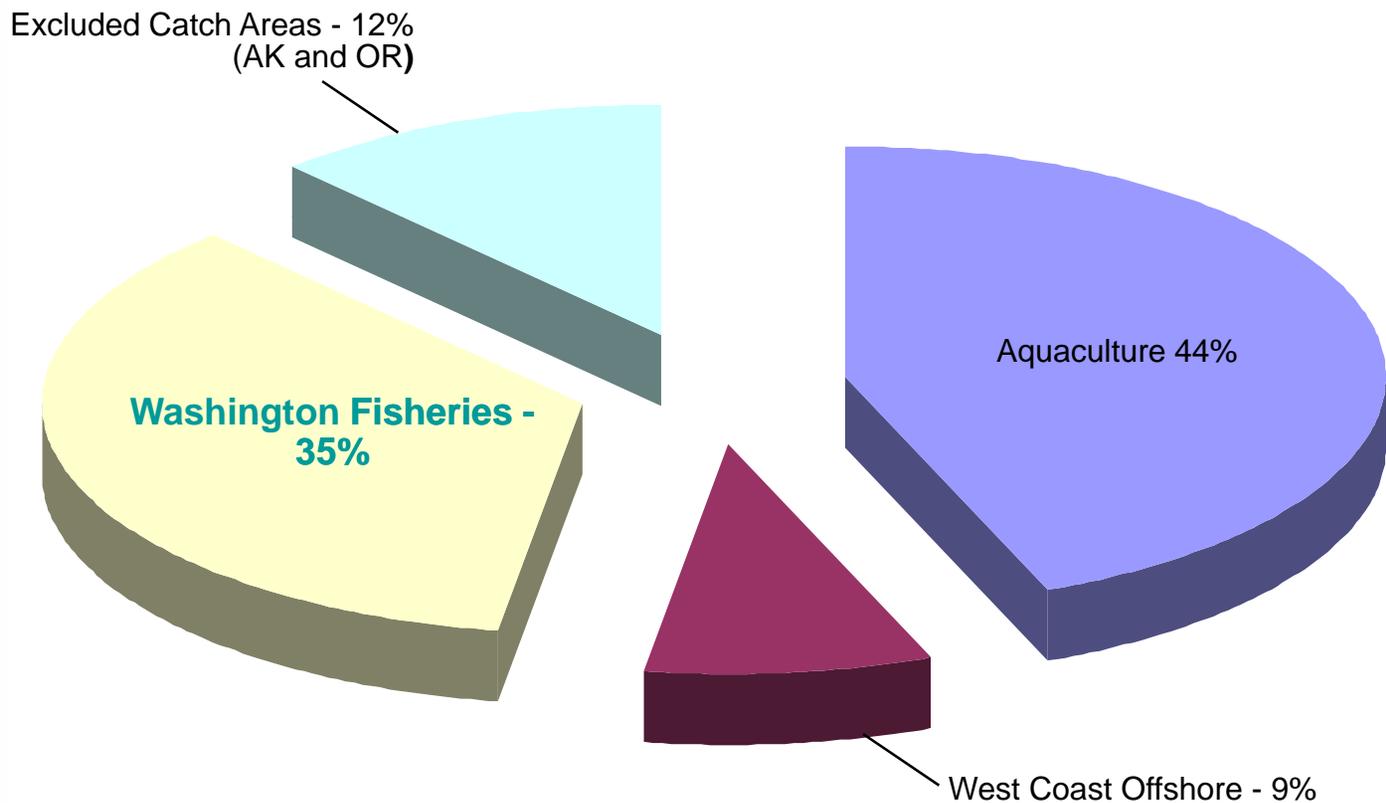
Commercial Fisheries – Total Personal Income by Species Group

Total = \$148.0 million



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Commercial Fisheries – Relative Contribution of Harvest (Ex-Vessel) Values from State Waters and Other Non-Treaty Commercial Landings



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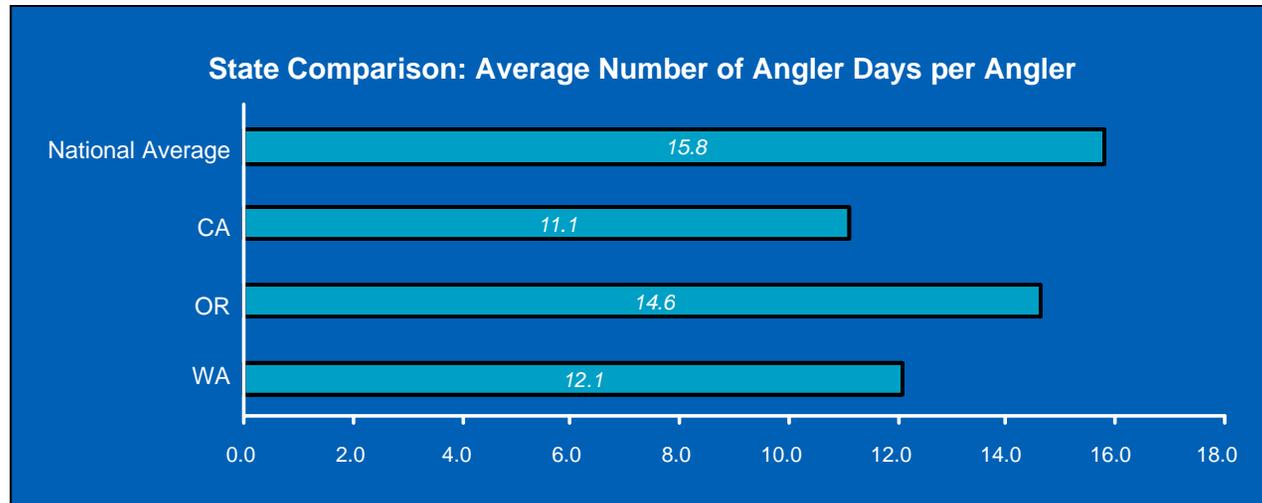
Recreational Fisheries – Anglers and Angler Days

Resident Anglers

- ▶ 725,000 anglers
- ▶ 8.5 million angler days
- ▶ 12 days per angler

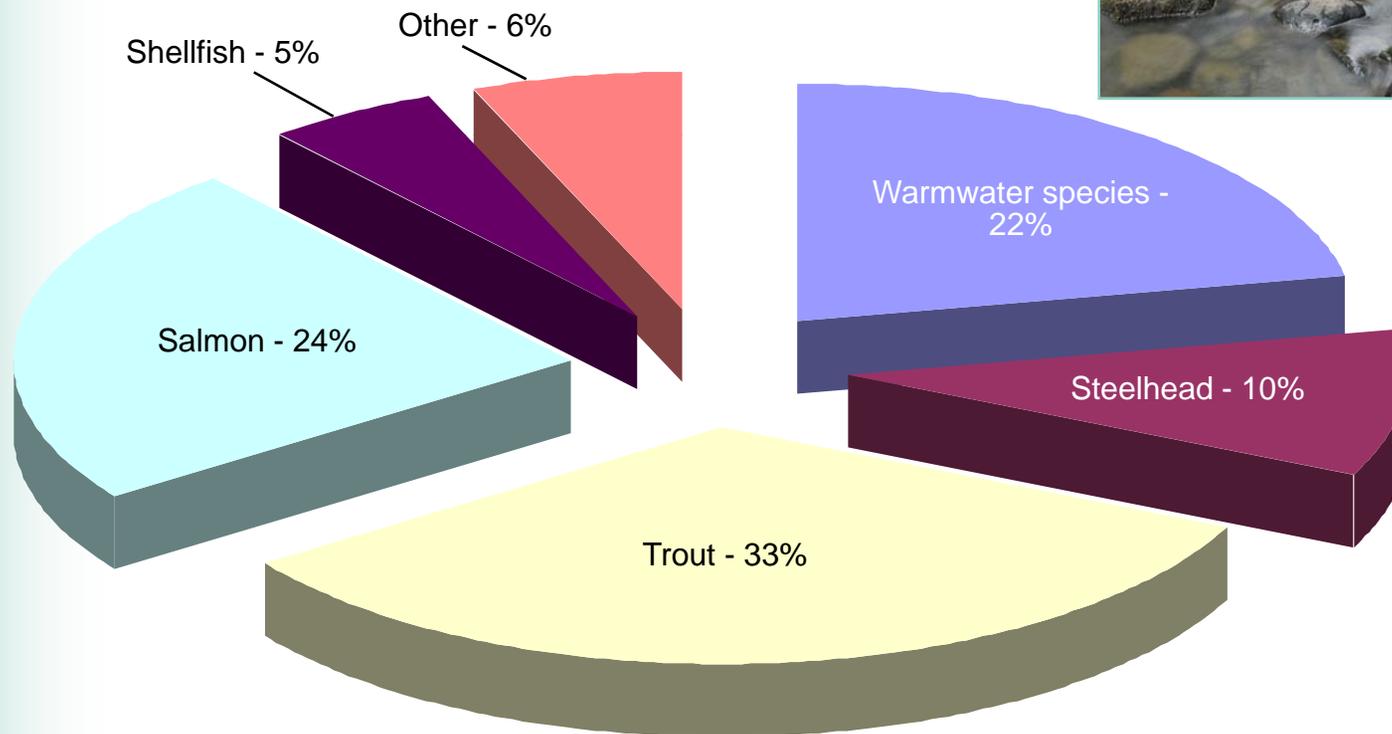
Non-resident Anglers

- ▶ 98,000 anglers
- ▶ 615,000 angler days
- ▶ 6 days per angler



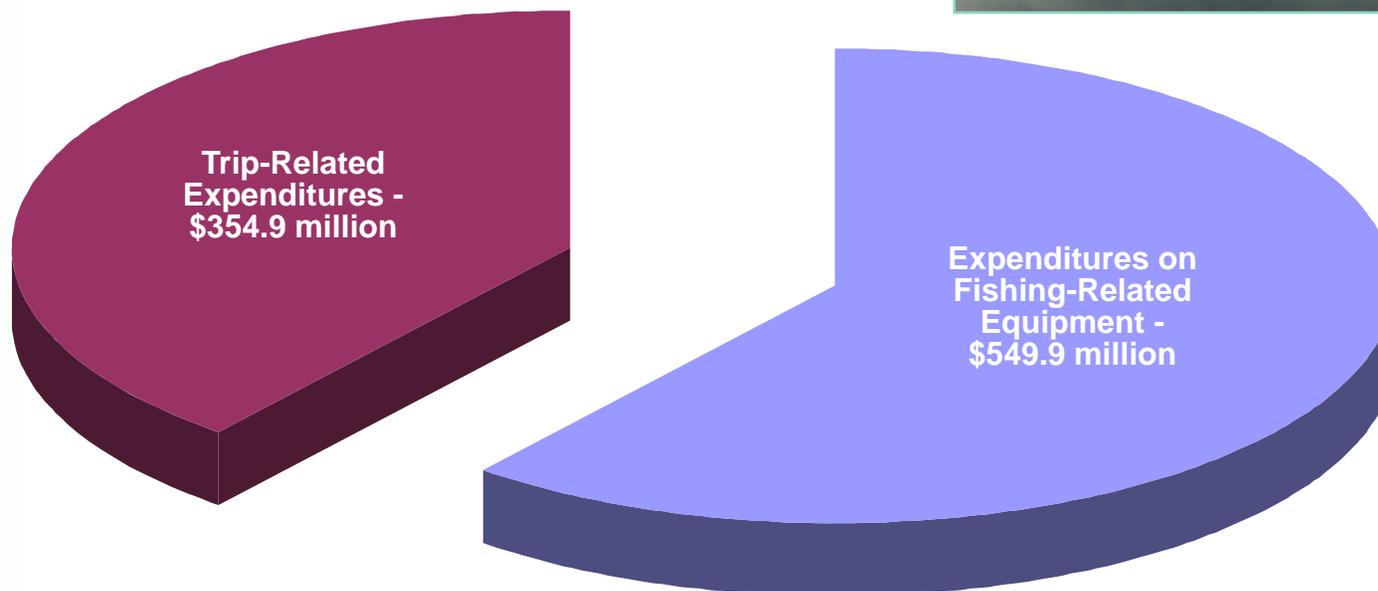
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Recreational Fisheries - Relative Share of Angler Days by Target Species Group



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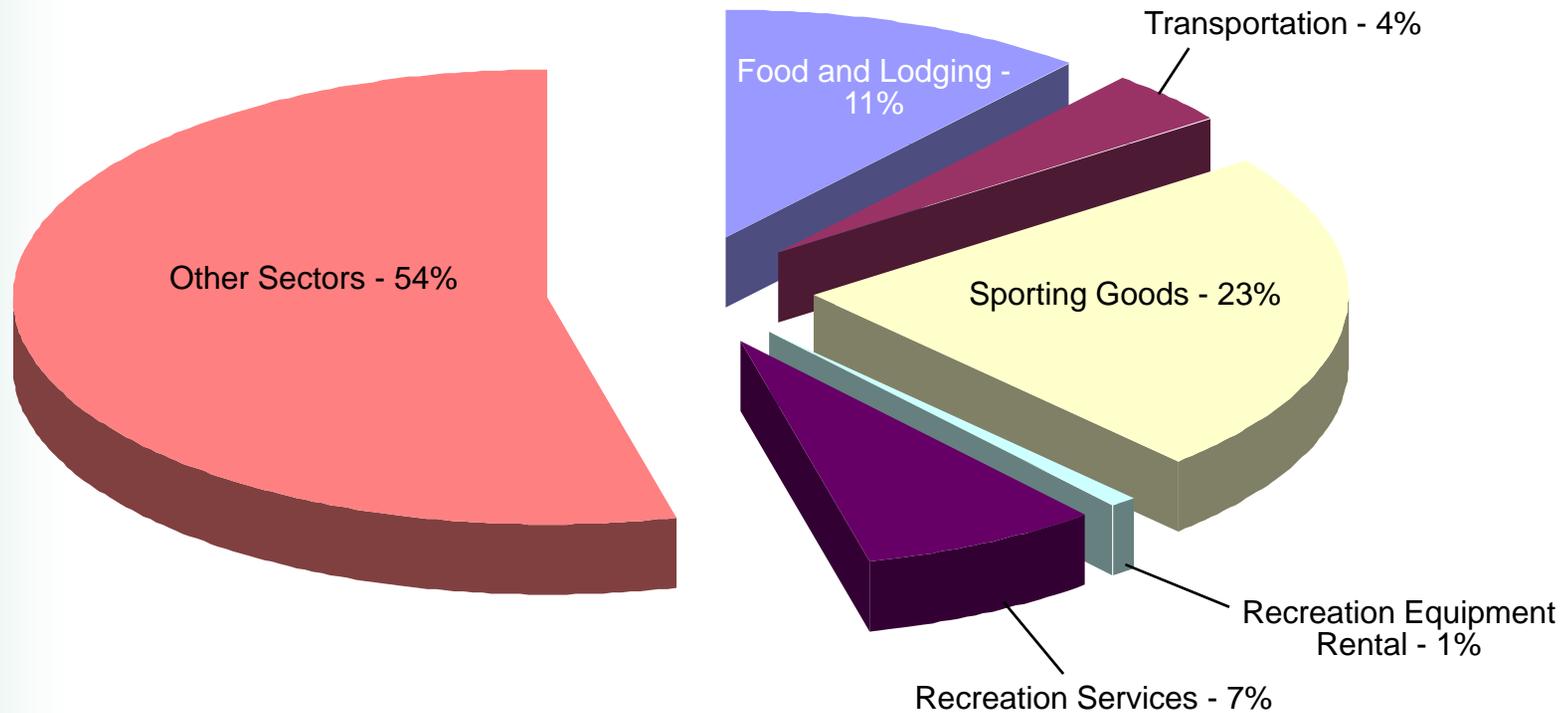
Recreational Fisheries – Angler Expenditures



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Recreational Fisheries – Percent of Total Personal Income by Business Sector

Total Personal Income = \$376.7 million



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▶ Questions???

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