NOTICE OF OFFICE OF MANAGEMENT AND BUDGET ACTION

Date 11/19/2012

Department of Commerce
National Oceanic and Atmospheric Administration
FOR CERTIFYING OFFICIAL: Simon Szykman
FOR CLEARANCE OFFICER: Diana Hynek

In accordance with the Paperwork Reduction Act, OMB has taken action on your request received 11/07/2012

ACTION REQUESTED: Generic IC
TYPE OF REVIEW REQUESTED:
ICR REFERENCE NUMBER: 200906-0648-012
AGENCY ICR TRACKING NUMBER:
TITLE: Economic Surveys for U.S. Commercial Fisheries
LIST OF INFORMATION COLLECTIONS: See next page

OMB ACTION: Approved without change
OMB CONTROL NUMBER: 0648-0369
The agency is required to display the OMB Control Number and inform respondents of its legal significance in accordance with 5 CFR 1320.5(b).

EXPIRATION DATE: DISCONTINUE DATE:

BURDEN:	RESPONSES	HOURS	COSTS
Previous	7,000	7,000	0
New	7,000	7,000	0
Difference			
Change due to New Statute	0	0	0
Change due to Agency Discretion	0	0	0
Change due to Agency Adjustment	0	0	0
Change Due to Potential Violation of the PRA	0	0	0

TERMS OF CLEARANCE: Terms of the Generic ICR remain in effect.

OMB Authorizing Official: Kevin F. Neyland
Deputy Administrator,
Office Of Information And Regulatory Affairs

List of ICs				
IC Title	Form No.	Form Name	CFR Citation	Hrs/$/Resp
Northeast Fishing Vessel Annual Cost Survey (approved 3-5-09)	NA	Northeast Fishing Vessel Annual Cost Survey		2,274 / 0 / 2,274
West Coast Limited Entry Cost Earnings Survey (appr. 5-7-09)	NA	West Coast Limited Entry Cost Earnings Survey		185 / 0 / 185
Main Hawaiian Islands Bottomfish Fishery Survey	NA	Main Hawai'ian Islands Bottomfish Fishery Cost Earning Survey, Outreach Materials		369 / 0 / 492
West Coast Commercial Fishing Vessel Cost Earnings Survey	NA			928 / 0 / 928
West Coast Drift Gillnet and Harpoon Fishery Annual Cost Earnings Survey	NA			74 / 0 / 49
Cost Earnings Study of Mariana Archipelago Small Boat Fleet	NA	Marianas Small Boat Intercept Survey		150 / 0 / 300
Hawaii For-Hire (Charter) Fishery Cost-Earnings Survey	NA	Hawaii Charter Fleet Cost-Earnings Survey 2011		89 / 0 / 119
West Coast Limited Entry Groundfish Fixed Gear Economic Data Collection	NA	West Coast Limited Entry Groundfish Fixed Gear Economic		198 / 0 / 99
Cost-Earnings Survey of Hawaii Longline Fleet Based on 2011 Operation	0648-0369	Hawaii Longline Cost-Earnings Questionaire		103 / 0 / 103
California Commercial Passenger Fishing Vessel (CPFV) 2012 Calendar Year Cost and Earnings Survey	NA	California CPFV 2012 Calendar Year Cost and Earniings Survey		188 / 0 / 450
Total Hours Actually Used for Information Collections Under Currently Approved ICR:				4,558

PAPERWORK REDUCTION ACT
DOC/NOAA ECONOMIC PERFORMANCE DATA SURVEYS FOR WEST COAST COMMERCIAL FISHERIES CLEARANCE
OMB CONTROL NUMBER 0648-0369

This form should only be used if you are submitting a collection of information for approval under the DOC/NOAA Information Collection Request for Economic Performance Data surveys for the West Coat Commercial Fisheries assigned OMB control number 0648-0369. Mail this form, responses to the supplemental questions, the collection instrument, and any additional documentation to: **Office of Information and Regulatory Affairs, Office of Management and Budget, Docket Library, Room 10102, 725 17th Street NW, Washington D.C. 20503.**
If the collection does not satisfy the requirements of the program clearance, you should follow the regular PRA clearance procedures described in 5 CFR 1320.

Title (Please be specific)

California CPFV (Commercial Passenger Fishing Vessel) 2012 Calendar Year Cost and Earnings Survey

Burden Hour Estimates

Number of respondents	**300**	Total Burden Hours	**188**
Hours per response	**1 hour, 10 minute**	Cumulative Burden Hours under Program Clearance	**4,370**

Agency Contact *(person who can best answer questions about the content of the submission)*

Name James Hilger

Phone 858-546-7140

Certification: The collection of information requested by this submission meets the requirement of the OMB approval for OMB control number 0648-0369.

James Hilger — Oct-22-12

Signature of Program Official — Date

Sarah Brabson — Oct 23-12

Signature of NOAA Paperwork Clearance Officer — Date

NA (This form does not go to OM

OIRA — Date

California Commercial Passenger Fishing Vessel (CPFV) 2012 Calendar Year Cost and Earnings Survey
Responses to Supplemental Questions for PRA Clearance
OMB Review of Individual Instruments

Project Title: California Commercial Passenger Fishing Vessel (CPFV) 2012 Calendar Year Cost and Earnings Survey

Justification under OMB Generic Clearance:
(Economic Survey of U.S. Commercial Fisheries, OMB Control No. 0648-0369)

Commercial fisheries economic data collection programs implemented by National Marine Fisheries Service (NMFS) address statutory and regulatory mandates to determine the quantity and distribution of net benefits derived from living marine resources as well as predict the economic impacts from proposed management options on fishing vessels, shore side industries, and fishing communities. In particular, these economic data collection programs contribute to legally mandated analyses required under the Magnuson-Stevens Fishery Conservation and Management Act (MFCMS), the National Environmental Policy Act (NEPA), the Regulatory Flexibility Act (RFA), and Executive Order 12866 (E.O. 12866).

This particular survey instrument closely mirrors research efforts recently approved under OMB Control No. 0648-0369 (commercial fisheries) for the Pacific Islands for-hire (charter) sector. Like the Pacific Islands for-hire (charter) sector, California Commercial Passenger Fishing Vessel (CPFV) charter operations are considered commercial ventures and not recreational pursuits[1,2]. Therefore, to estimate the economic contribution of the California CPFV fleet, and the impacts of federal actions on the California CPFV fishery, the survey will address the fishery as commercial rather than recreational. This request is for a one-time survey of the California CPFV fleet which has been developed based on previously approved question categories as outlined in the OMB Control No. 0648-0369 (commercial fisheries) supporting statement.

Objective: The CPFV fishing industry has a long history in California, as residents, tourists, and big tournament fishermen have come to California to experience a myriad of fishing opportunities, from tuna and billfish fishing in Southern California to salmon fishing in Northern California, with rockfish fishing opportunities throughout the state. CPFV fishing is a notable component of tourism along the entire California coast. In 2009, charter patrons in California generated sales impacts of approximately $133 million and value-added impacts of $76 million[3].

[1] Hanan, Doyle and Zachary Hanan. 2012. West Coast Charter Boat Cost-Earning Pilot Survey for FY 2011. NOAA commissioned pilot study
[2] CDFG- 2012 Commercial Fishing Digest
[3] NOAA – Fisheries Economics of the United States 2009.

The California CPFV fleet is an important part of fishing economies and recreational charter opportunities along the tri-state Pacific coast. Of the three states, California accounted for 82% of angler days, and 84% of fish caught by charter or party boat during the 2010 and 2011 calendar years[4]. The California CPFV fishery is also diverse in catch, targeting a wide range of species over a large geographic area. Although the California CPFV fishery represents a large portion of the Pacific coast commercial recreational fisheries, there has been little recent information collected, including costs and earnings data that are needed in order to estimate the fishery's contribution to the state's economy.

IMPLAN[5] sector (cost and earnings) data from the California CPFV fishery is required in the estimation of the Input Output Model for Pacific Coast Fisheries (IO-PAC) which is used to provide statutorily required estimates to the Pacific Fishery Management Council for fisheries under Fishery Management Plans (FMPs) administered in the Northwest and Southwest regions.

Recent studies on the California CPFV industry have primarily reported on CPFV patrons' demographics, motivations, and expenditures; not on the economic characterization of the charter operations[6]. Current data on the operational aspects, financial performance, and economics of the California CPFV fleet have been characterized as under sampled and do include all geographic areas in the state of California[7]. The last state-wide survey of the California CPFV fleet focused on the 2000 calendar year[8]. Since then, major changes to the management of the fishery have occurred: (1) the implementation of the California Marine Life Protection Act (MLPA), including the 4300 square mile cowcod conservation areas in 2001, and (2) the establishment of Annual Catch Limits (ACLs) for all Federally-managed fisheries. Given the multitude of recent macroeconomic changes in the past 12 years, coupled with regulatory changes, there is a need for a collection of economic cost and earnings data and related social data on the California CPFV fleet to support the fishery management process.

1. The potential respondent universe and any sampling or other respondent selection method to be used and the expected response rate.

Potential Respondent Universe

The potential respondent universe consists of owners of the approximately 300 CPFV vessels registered in the State of California. The number was estimated from the California Department of Fish and Game CPFV Registered Vessel list for 2009 and 2010, when the number of

[4] See RecFin summary data at: http://www.recfin.org
[5] IMPLAN (IMpact analysis for PLANning) is a data and software package designed to estimate local economic effects from regional economic activity.
[6] Gentner, B. and S. Steinback. 2008. The Economic Contribution of Marine Angler Expenditures in the United States, 2006. NOAA Technical Memorandum NMFS-F/SPO-94.
[7] Ecotrust. 2012. Establishing a Baseline and Assessing Spatial and Socioeconomic Change in the California Central Coast Commercial and CPFV Fisheries. Techincal Report to the MPA Monitoring Enterprise, California Ocean Science Trust.
[8] PSMFC. 2004. West Coast Charter Boat Survey Summary Report 2000. Economics Data Program.

registered and active CPFV varied between 298 and 302 respectively. Owners of each of the approximately 300 vessels, rather than captains, will be the target respondents because they possess the specific economic and social data for the operations they run. The final respondent universe will be assembled using the 2012 California Department of Fish and Game (CDFG) CPFV Permit Program database for vessels in California.

Sampling and Other Respondent Selection Methods

The survey will be distributed in two phases to all owners of the approximate 300 CPFV registered in California to ensure the highest response rate. Phase 1 will select 150 vessels from the 2012 vessel census universe following a stratified random sampling framework. Stratification details are discussed in Question 2. Previous cost earnings surveys of the commercial passenger fishing vessel fleets (charter, for-hire, head-boats) have demonstrated the effectiveness of in-person interviews in collecting data and obtaining accurate information[9]. In order to improve the quality of information collected, in-person survey administration will be the primary mode for the study, and the only mode offered to Phase 1 respondents.

Phase 2 will sample the remaining approximate150 vessels, which were not sampled during Phase 1, following the same stratified random sampling framework as Phase 1. Conditional on the response rate for each stratum in Phase 1, respondents in Phase 2 will be offered in-person, telephone or mail-in mode interviews. The two-phase approach balances data quality and response rate concerns. By incorporating a mixed mode design, we will maximize response rate and ensure the survey sample is representative of our respondent universe.

Prior to data collection, field staff will undertake outreach by contacting CPFV professional associations, and other angling groups. This will involve formal written requests for cooperation, personal visits to association meetings, and publication of information materials, such as factsheets, about the data collection and expected use of the collected information. CPFV owners will then receive a formal letter of invitation to participate in the survey as well as a fact sheet of the commonly asked questions and answers. Following mailing of the letter of invitation, owners will be contacted by phone to confirm receipt of the letter of invitation, and asked to schedule a one hour interview appointment. Interviews will be conducted in-person for each owner during the scheduled time.

All survey recipients will be given the name, telephone number, and email of the principal investigator to contact with any questions or to schedule an interview with field staff, if desired.

Expected Response Rate

[9] Hamilton, M. and S. Huffman, *Cost-Earnings Study of Hawaii's Small Boat Fishery, 1995-1996*, 104 pp, University of Hawaii, Joint Institute for Marine and Atmospheric Research, 1000 Pope Road, Honolulu, HI 96822, 1997
Hospital, J., S. Scholey and M. Pan. 2011. *Economic and Social Characteristics of the Hawaii Small Boat Pelagic Fishery*. Pacific Islands Fisheries Science Center. Administrative Report H11-01. 78p.

The expected combined response rate in Phase 1 and Phase 2 is approximately 50% of the estimated sample universe of 300 vessels, with an expected sample size of 150 (300*50%) completed and usable surveys. We expect to be able to reach this response rate by implementing the survey throughout the 2013 calendar year. The CPFV industry's slow season varies by strata; however, the spring is the slow season for most vessels. Interviews will be scheduled throughout the year in order to increase owner availability, and take into account differences in the fishery season due to geographical factors, species availability, custom demand, seasonal closures, and vessel maintenance requirements. When possible, interviews will be scheduled in the spring directly following federal and state tax reporting deadline on April 15, 2013 as vessel owners should have cost and earnings data readily available for the 2012 calendar year, further reducing their response burden. Survey implementation may extend to February 1st, 2014, to maximize participation if required by vessel owner availability.

With the outreach described above, we expect to reach our desired response rate by increasing the industry's awareness of the study and interest in participation. Our expected response rate of 50% is admittedly low, however, a recent study of the Oregon and Washington charter boat fleet achieved a 43% response rate.[10] With increased outreach to the industry we believe a 50% response rate is an achievable expectation for the proposed California CPFV survey.

To address the potential for a low response rate the sampling will be divided into two phases and will utilize a mixed mode data collection strategy[11] in Phase 2 in order to increase the response rate and reach the expected sample size. Mixed mode surveys combine two or more modes of communication to collect information and can be affective at achieving a higher response rate[12]. Conditional on the response rate in Phase 1, participants in Phase 2 will be offered in-person, telephone or mail-in mode interviews. See Table 1. Using this mixed mode design will maximize response rate and ensure the survey sample is representative of our respondent universe.

The two phase approach balances the data quality and response rate concerns. In-person interviews are expected to be of higher data quality, but may have a lower response rate due to scheduling difficulties; whereas mixed-mode interviews offer more scheduling flexibility and are expected to have a higher response rate, but may have more data quality issues due to the lack of in-person interviewer oversight of telephone and mail survey instruments.

[10]Leonard, J. and P. Watson. 2012. The role of charter boat operations in fishing communities: a social and economic analysis of the marine charter boat fleets in Oregon and Washington.
[11]de Leeuw, E., J. Hox and D. Dillman. 2008. *International Handbook of Survey Methodology*. New York, NY: European Association of Methodology/Lawrence Erlbaum Associates.
[12] Dillman et al. 2009. Response rate and measurement difference in mixed-mode surveys using mail, telephone, interactive voice response (IVR) and the Internet. Social Science Research (38) 1-18.

Table 1
Expected Response Rates for California CPFV Fleet

Phase	Number of Vessels	Contact Method	Primary Collection Method	Alternative Collection Methods	Expected Response Rate	Expected Number of Responses
1	150	Telephone	In-person	None	50%	75
2	150	Telephone	In-person	Telephone, or Mail-in	≥50%	75
Total	**300**					**150**

2. Data collection procedures, including the statistical methodology for stratification and sample selection, the estimation procedures, the degree of accuracy needed for the intended purpose, expected dates of survey implementation, and any unusual problems requiring specialized sampling procedures.

Data Collection Procedures, Sample Selection and Stratification

We intend to conduct a survey of the California CPFV charter fleet using a two-phase mixed-mode survey design. Data collection and sample selection methods are detailed in Question 1 of this submission.

The survey will be stratified to model current conservation and management issues in the California CPFV fishery. The most relevant stratifications include geographic fishing grounds, and vessel size. For proposed sampling, geographic fishing grounds will be into two categories: North for vessels operating north of Point Conception, and South for vessels operating south of Point Conception. Vessel Size will be divided into two categories "Small" for vessels less than or equal to 42 feet in length, and "Large" for vessels greater than to 42 feet in length. See Table 2.

Table 2
Survey Stratifications

Vessel Size	Geographic Fishing Grounds (CDFG districts)
Large	North (Central, Bay Area, Wine, and Redwood districts)
Small	South (South and Channel districts)
*Fishing grounds determined from http://www.recfin.org/	

Degree of Accuracy Needed for Intended Purpose

The primary importance of these data is to evaluate the cost and earnings structure of the entire CA CPFV fishery. To achieve this aim we plan to conduct a census of all 300 vessels in the CA

CPFV fishery. Assuming a response rate of 50%, we expect to obtain 150 complete and usable surveys. This would allow us to report sample means within 10% of the population mean at 99.9% confidence across the entire fishery[13]. This level of accuracy is sufficient to evaluate the economic impacts from proposed management options on the CA CPFV fishery, and to contribute to the development of the coast-wide I/O model for recreational fishing.

There has been an identified need to gain more detailed estimate statistics stratified by vessel size and geographic operating area in order to provide statistical information to the public and resource managers. Assuming a 50% response rate, we expect relatively high confidence in the proposed data stratified by geographic and vessel length characteristics. See Table 3[14]. Without assuming a higher response rate, the constraint on our level of confidence is due to the relatively small sample populations in three of the four categories.

Table 3
Stratification Sample Size and Confidence Assuming 10% Error

	South	North
Large	137 (sample population) 69 (expected respondents) 98.1% confidence	43(sample population) 22 (expected respondents) 81.5% confidence
Small	47 (sample population) 24 (expected respondents) 83.4% confidence	66 (sample population) 33 (expected respondents) 89.3% confidence

Expected Dates of Survey Implementation

The proposed start date for initiating the mail and telephone contact is January 1, 2013. As stated previously, this will coincide with California CPFV off-season. The data collection is to be completed over a year period, with interviews beginning about a month after initiating contact, and ending February 1, 2014. This timeframe will allow time for owners to schedule interviews at their convenience; thereby maximize the response rate and facilitate respondent participation.

3. The methods used to maximize response rates and address non-response. The accuracy and reliability of the information collected must be shown to be adequate for the intended uses.

Strategy to Maximize Response Rates

We assume an estimated response rate of 50% based on the 43% response rate of the 2006 NW marine charter survey, our comprehensive outreach plan, and the mixed mode nature of the

[13] Percent confidence was calculated using equations adapted from Dillman, D.A., J.D. Smyth and L.M. Christian. 2009. *Internet, Mail, and Mixed-Mode Surveys: The Tailored Design Method*. Hoboken, New Jersey: John Wiley & Sons, Inc.
[14] See Dillman, et. al. 2009.

interviews. There are no previous studies of the fleet to suggest a higher expected response rate. Assuming a low response rate allows us to ensure other aspects of our survey protocol, such as stratification, are sufficiently robust, with enough sample vessels in each stratification cell to accommodate the estimated response rate. A higher than expected response rate will increase the statistical confidence in the study's findings.

There are numerous methods we will administer to achieve the estimated 50% response rate. Extensive outreach activities informing the fishermen and fishing associations of the purpose and need for the cost-earnings survey are expected to facilitate survey participation and completion. Outreach efforts will be coordinated with the California CPFV Cost and Earning Survey steering committee, which includes industry representatives. Outreach will occur on a number of levels and may include the following:

- Contacting California charter professional organizations and other angling groups.
- Writing a formal request for cooperation to the above-mentioned organizations and groups along with personal visits to association meeting.
- Generating a fact sheet of commonly asked questions and answers.
- Sending a formal briefing letter on the data collection effort to all registered CPFV owners.
- Maintaining information regarding the data collection effort on the internet.

Additional methods for improving the response rate include: providing a full year for respondents to schedule an interview; and conditional on response rates in Phase 1, offering participants in Phase 2 in-person, telephone or mail-in mode interviews.

Strategy to Address Non-Response

All CPFVs are required to be registered in the state of California with the CDFG. Additionally the CDFG records vessel specific fishing effort and catch data. Using these resources, we are aware of the spatial distribution of registered vessels by homeport across California, as well as the distribution of fishing effort. Based on the distribution of survey responses that we receive these databases provide a direct link, both spatial and effort-based, to validate the representativeness of our sample. If non-response bias appears evident in our survey responses, weighting methods will be developed to account for non-response.

Accuracy of Data Collected

NMFS needs to measure the economic performance of California CPFV charter operations in order to meet legal and regulatory requirements, support fisheries management decision making, and pursue more detailed economic research. Currently, no cost earnings data are available to meet these needs. This study will collect data that is needed to construct key economic performance measures such as profitability, productivity, economic impacts, and social aspects of the fishery. The data gathered and performance measures constructed will be used to address a wide range of issues.

While the data will be used to comply with legal and regulatory requirements, these requirements do not specify a level of data accuracy. Being able to detect a non-response bias, and correct either through weighing methods or additional sampling effort will enable sufficient accuracy and fleet representation.

4. How the survey instrument was developed, including the steps taken to validate the questionnaire design.

The survey administration protocol is similar to the ones used for Oregon Trawl and Pacific Coast Open Access surveys conducted by Carl Lian at the Northwest Fisheries Science Center[15] and the For-Hire Cost and Earnings Survey for the Mid-Atlantic and New England conducted by Scott Steinback of the Northeast Fisheries Science Center[16].

The survey instrument closely mirrors an instrument successfully fielded by Hamilton (1998) and a survey recently approved for the Hawaii For-Hire Sector, in keeping with approved questions under OMB Control No. 0648-0369. The survey has been designed using feedback from a pilot study of the San Diego CPFV industry consisting of interviews of eight CPFV owners representing 10 vessels from a total of 76 vessels registered in San Diego County in 2011. The proposed survey instrument is designed by NMFS Southwest Fisheries Science Center (SWFSC) staff, in consultation with project steering committee members and contractors[17] .

5. The reporting and use of the results of the survey

<u>Use of Survey Results</u>

NMFS needs to measure the economic performance of California CPFV charter operations in order to meet legal and regulatory requirements, support fisheries management decision making, and pursue more detailed economic research. Currently, no cost earnings data are available to meet these needs. This study will collect data that is needed to construct key economic performance measures related to profitability, productivity, economic impacts, and social aspects of the fishery. The data gathered and performance measures constructed will be used to address a wide range of issues important to the Southwest Regional Office, Pacific Fishery Management Council, and the California CPFV charter fleet including estimating the economic contribution of the California CPFV fleet and the estimated impact of changes in environmental, economic, or management conditions on the on the California CPFV fishery.

[15] Lian, C. 2012. West Coast open access groundfish and salmon troller survey: Protocol and results for 2005 and 2006. U.S. Dept. of Commerce, NOAA Tech. Memo., NMFS-NWFSC-116, 52 p

[16] QuanTech and Gentner. 2011. Recreational For-Hire Economic Survey for the Mid-Atlantic and New England: Summarization and Results Report of Total In-Person Interviews Completed by Stratified Region.

[17] Hanan, Doyle and Zachary Hanan. 2012. West Coast Charter Boat Cost-Earning Pilot Survey for FY 2011. NOAA commissioned pilot study.

Reporting of Survey Results

Survey results will be reported through a series of reports and project summaries prepared for the survey respondents, general fishing public, fisheries managers, and academics. It is anticipated that results will also be reported in the form of a technical memorandum of the Southwest Fisheries Science Center, academic publications, presentations at conferences, and public meetings. All reporting of survey results will conform to data confidentiality requirements. Qualified researchers with data access and confidentiality agreements will have access to raw data for performing future analyses, if requested.

Information Quality Guidelines and Confidentiality

It is anticipated that the information collected will be disseminated to the public or used to support publicly disseminated information. NMFS will retain control over the information and safeguard it from improper access, modification, and destruction, consistent with NOAA standards for confidentiality, privacy, and electronic information. In particular, the data collected will be kept confidential as required by section 402(b) of the Magnuson-Stevens Act and NOAA Administrative Order 216-100, Confidentiality of Fisheries Statistics, and will not be released for public use except in aggregate statistical form without identification as to its source.

The information collection is designed to yield data that meet all applicable information quality guidelines. Prior to dissemination, the information will be subjected to quality control measures and a pre-dissemination review pursuant to Section 515 of Public Law 106-554.

6. Contact information for agency coordinator and principal investigator.

Agency Coordinator
Dale Squires
NOAA Fisheries
Southwest Fisheries Science Center
8604 La Jolla Shores Drive
La Jolla, CA 92037
858-546-7113
dale.squires@noaa.gov

Principal Investigator
James Hilger
NOAA Fisheries
Southwest Fisheries Science Center
8604 La Jolla Shores Drive
La Jolla, CA 92037
858-546-7140
james.hilger@noaa.gov

7. Estimated burden and number of respondents

Completing the survey is expected to take 1 hour per respondent. As a result, the survey is expected to impose a total of 187.5 (188) burden hours on the California CPFV (charter) fleet.

Total Target Population	300
Average burden per initial contact	5 min
Total burden hours for contact	25 hours (300 x 5 min)
Expected survey response rate	50%
Expected # survey respondents	150
Average burden hours/survey and scheduling	1 hour, 5 min
Total burden hours for surveyand scheduling	162.5 (150 x 1 hour, 5 min)
Total burden hours	187.5 (188)

Science, Service, Stewardship

NOAA FISHERIES SERVICE

Southwest Fisheries Science Center

Fisheries Resource Division

The Fisheries Resource Division develops the scientific foundation for the conservation and management of marine resources in the California Current and Pan-Pacific Pelagic Ecosystems. We serve the public and contribute information to management organizations and the scientific community.

California CPFV (Commercial Passenger Fishing Vessel) 2012 Calender Year Cost and Earnings Survey

Frequently Asked Questions

Why is this survey being conducted?
This survey is being conducted to collect information needed to increase the understanding of the important economic contributions of the California CPFV fishery, and the impacts of federal actions on the fishery. The data you provide will be of great value toward developing this understanding.

How long will the survey take?
The survey will take approximately one hour to complete.

What do I need to bring to my scheduled interview?
You should bring with you your accounting books containing your cost and earnings data from the 2012 calendar year, and information on the number and type of trips you took during 2012 (including cost/earnings data for each trip type). If you publish a rate-sheet or brochure outlining trips and prices, please bring a copy to your scheduled interview.

How do I benefit from participating?
Your participation is voluntary, however, through participation you will increase the understanding of the CPFV industry in California. Sharing your experience in the fishery will help provide information needed to estimate the economic impact and number of jobs supported by the CPFV fishery in California. Information will also be used to understand the impact that changes in environmental, economic, and management conditions have had on the fishery. The results of the survey will be available online.

How will I be sure my data is confidential?
Data collected will be kept confidential as required by section 402(b) of the Magnuson-Stevens Act and NOAA Administrative Order 216-100, Confidentiality of Fisheries Statistics, and will not be released for public use except in aggregate statistical form without identification as to its source. Particpation or lack of participation in the survey will remain condiential. All economic data will be aggregated into statistical form for all reports. It will not be possible to identify your individual business in any publication

How will my data be used?
Your data, combined with data from all the other respondents, will form a critical component of a research study evaluating the economic contributions of the California CPFV fishery, and the effects that changes in environmental, economic, and management conditions may have on the industy. Your data will help to produce an accurate understanding of the economic health of the California CPFV fishery that will inform resource managers and the public.

If you have any further questions or concerns pertaining to this survey, please contact James Hilger, by telephone at 858-546-7140 or by email at james.hilger@noaa.gov.

UNITED STATES DEPARTMENT OF COMMERCE
National Oceanic and Atmospheric Administration
NATIONAL MARINE FISHERIES SERVICE
Southwest Fisheries Science Center
8901 La Jolla Shores Drive
La Jolla, CA 92037-1508

<< Date >>
<< Name >>
<< Address >>

Dear << First Name >>,

I am writing to ask your help in improving the understanding of California's recreational fisheries and the Commercial Passenger Fishing Vessel fleet by participating in a voluntary study conducted by NOAA's Southwest Fisheries Science Center. The information collected will be used to provide estimates of the economic contributions of recreational fisheries, and the impact that changes in economic, environmental, and management conditions may have on these fisheries. The study survey will focus on two primary types of information: (1) information on business costs and earnings to be used for assessing the economic contribution and financial performance of this fleet, and (2) *your* opinions about the economic state of California recreational fisheries. The information collected will be aggregated for reporting purposes to insure your confidentiality and reported to resource managers and the public.

As a licensed California CPFV owner, we are hoping that you can help in this study. Your contact information was obtained from the California Department of Fish and Game (CDFG) through a cooperative agreement between CDFG and NOAA National Marine Fisheries Service. Data collected will be kept confidential as required by section 402(b) of the Magnuson-Stevens Act and NOAA Administrative Order 216-100, Confidentiality of Fisheries Statistics, and will not be released for public use except in aggregate statistical form without identification as to its source. While your participation is voluntary, we hope that you can help us in this research. If you have any questions or concerns pertaining to this survey, please contact James Hilger by telephone at 858-546-7140 or by email at james.hilger@noaa.gov.

Surveys will be conducted by Doyle Hanan of Hanan & Associates through an in-person interview at a convenient location near you. Please see the attached FAQ sheet for more information. Doyle Hanan will be contacting you in the upcoming weeks to schedule an in-person interview. You may contact Doyle Hanan by telephone at 858-832-1159 or by email at drhanan@cox.net.

Your participation is greatly appreciated. Let your voice be heard.

Sincerely,
< Signature >

James Hilger
NOAA Fisheries
Southwest Fisheries Science Center
8901 La Jolla Shores Drive
La Jolla, CA 92037
858-546-7140 (james.hilger@noaa.gov)

California CPFV
(Commercial Passenger Fishing Vessel)
2012 Calendar Year
Cost and Earnings Survey

All answers are strictly confidential.
Please report 2012 calendar year statistics.

This survey is funded by the National Oceanic and Atmospheric Administration, National Marine Fisheries Service, to collect data on the California CPFV fishery in order to better understand and manage recreational fishing.

Data collected will be kept confidential as required by section 402(b) of the Magnuson-Stevens Act and NOAA Administrative Order 216-100, Confidentiality of Fisheries Statistics, and will not be released for public use except in aggregate statistical form without identification as to its source.

This survey questionnaire addresses the costs and income streams related to the operation of a CPFV vessel. The survey has 9 parts:

A. **Industry Participation Background**
B. **Annual Business Based Expenditures**
C. **Vessel Characteristics**
D. **Annual Vessel Based Expenditures**
E. **Annual Vessel Based Fishing Operations Revenue**
F. **Annual Vessel Based Non-Fishing Operations Revenue**
G. **Individual trip type Expenses and Revenues**
H. **Owner Opinion**
I. **Business Structure and Outlook**

A. Industry Participation Background

#	Question	
1.	What year did you become involved in the CPFV industry in any capacity?	_____ (YYYY)
2.	Do you serve as the primary vessel captain for a CPFV vessel?	☐ Yes ☐ No
3.	How many CPFV vessels do you own?	_____ vessel(s).
4.	If you own a vessel, what year did you purchase first vessel?	_____ (YYYY)

B. Business Based Expenditures for the 2012 Calendar Year

(Exclude Vessel Specific Expenditures)
If expenses are attributed to multiple vessels, check here ☐

#	2012 Business Expenses	Expenses	Number of vessels covered by expense
5.	Professional services (legal, accounting, etc.)?	$	#
6.	Total payroll of non-vessel personnel (include wages, bonuses, benefits, payroll taxes, retirement payments and life, health, and unemployment insurance) **Exclude captain and crew payroll.**	$	#
7.	Rent paid on office space used for CPFV business? Include expenses if deductible from personal income tax for business expenses.	$	#
8.	Lease or loan payments for business motor vehicles?	$	#
9.	Telephone and other communications (business satellite phone, cell phone, internet/network)? Include expenses if deductible from personal income tax for business expenses.	$	#
10.	Advertising services or charges? Exclude if included in booking fee charges.	$	#
11.	Insurance (Vessel, property, liability, cars and trucks, etc.)?	$	#

C. Vessel Characteristics

For additional vessels please use additional forms.

#	Vessel	#
12.	CDFG management district? ☐South: San Diego County ☐South: Orange/Los Angeles County ☐Channel (Ventura to Santa Barbara Counties) ☐Central (San Luis Obispo to Santa Cruz County) ☐Bay Area (San Francisco and San Pablo Bay Counties, San Mateo, and Marin Counties) ☐Wine (Sonoma and Mendocino Counties) ☐Redwood (Humboldt and Del Norte Counties)	
13.	Year purchased?	_____ (YYYY) ☐NA
14.	Year built?	_____ (YYYY)
15.	Vessel length (ft)?	_____ (ft)
16.	Vessel gross tonnage (GRT)?	_____ (GRT)
17.	Insured vessel replacement value?	$
18.	Total horsepower of the main engine(s)?	HP
19.	Year of engine upgrade/replacement? If not applicable check the NA box.	_____ (YYYY) ☐NA
20.	Cruising speed (knots)?	knots
21.	Type of fuel?	☐Gasoline ☐Diesel ☐Other:_____
22.	Maximum total capacity (including captain and crew)?	# people
23.	Maximum number of passengers?	# people
24.	Number of bunks (maximum overnight passengers)?	# people
25.	Is there a “hot” galley available?	☐Yes ☐No

D. Vessel Based Expenditures for the 2012 Calendar Year

Additional vessels will use additional forms.

#	2012 Vessel Expenditures	#
26.	All payments made to skipper and crew (include wages, bonuses, benefits, payroll taxes, retirement payments and life, health, and unemployment insurance)?	$
27.	Fuel costs?	$
28.	Annual principal payment on note?	$
29.	Annual interest payment on note?	$
30.	Industry association fees/memberships?	$
31.	Payments made for mooring costs?	$
32.	Booking fees paid to landing?	$
33.	Booking fees paid to booking agent **other than** landing?	
34.	Haul out costs paid in 2012?	$
35.	Vessel and on-board equipment purchases, repair and maintenance (expensed in 2012)? (Engine, electronics, tanks, icemaker. fishing equipment, etc.)	$
36.	Food and drink costs?	$
37.	Bait costs?	$
38.	Ice (purchased dockside)?	$
39.	U.S. taxes, government fees and vessel permits (local, state, and federal)?	$
40.	Foreign taxes, government fees, visas, vessel permits, and foreign fishing licenses?	$

E. Vessel Based Fishing Operations Revenue for the 2012 Calendar Year

#	Revenue for 2012	#
41.	Annual total number of trips?	Trips
42.	Annual total number of passengers?	Pass
43.	Ticket sales & related fees (fuel, rod rentals, gunny sack, bunk sur-charges, etc.)?	$
44.	Food/beverage sales (not included in ticket sales)?	$
45.	Souvenirs?	$
46.	Filet charges to vessel operator? (do not include tips and fillet charges paid to crew)	$
47.	CDFG Angler License Commissions?	$ # of licenses:_____

F. Vessel Based Non-Fishing Operations Revenue for the 2012 Calendar Year

The following questions pertain to sources of revenue other than that generated by the charter boat fishing operation.

#	NON-FISHING	Number of Trips by Type?	Average # Passengers per Trip?	2012 Total Annual Revenue?
48.	Non-fishing passenger trips (wildlife viewing, SCUBA, burials)?	Trips	Pass/Trip	$
49.	Renting of vessel for non-recreational activities (research, construction, filming)?	Trips	Pass/Trip	$
50.	Commercial fishing activity, specify_____?	Trips		$
51.	Lodging that is owned by charter boat owner?			$
52.	Equipment rental?			$

G. Average Trip Based Revenues/Expenditures for the 2012 Calendar Year

For each species/trip length combination you operate, please indicate the primary target species and trip length, and answer the following questions.

Please include only revenues and expenditures that apply to the vessel owner.
Use additional pages as needed**.**

#	**Revenues/Expenditures (Average Per Trip)** **Check trip type to right** **Primary Target Species**	☐**1/2 day** ☐**3/4 day** ☐**Twilight** ☐**Night** ☐**Overnight** ☐**Day and a half** ☐**Multiday** ☐**Long Distance** **Sp:**_____	☐**1/2 day** ☐**3/4 day** ☐**Twilight** ☐**Night** ☐**Overnight** ☐**Day and a half** ☐**Multiday** ☐**Long Distance** **Sp:**_____	☐**1/2 day** ☐**3/4 day** ☐**Twilight** ☐**Night** ☐**Overnight** ☐**Day and a half** ☐**Multiday** ☐**Long Distance** **Sp:**_____
53.	Average hours at sea?	_____(hours) _____(days)	_____(hours) _____(days)	_____(hours) _____(days)
54.	Total trips per year?			
55.	Average passengers per trip?			
56.	Average revenue per trip? (Tickets, fuel & bunk surcharges, food and drink, souvenirs, fillet charges paid to vessel)	$	$	$
57.	Average labor cost per trip? ($ or % revenue)	$ **%**Rev	$ **%**Rev	$ **%**Rev
58.	Average fuel cost per trip? ($ or Gallons)	_____gallons $	_____gallons $	_____gallons $
59.	Live bait expenses? ($ or % revenue)	$ %Rev	$ %Rev	$ %Rev
60.	Other bait expenses?	$	$	$
61.	Months operating? (Circle those that apply)	Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec	Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec	Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

#	**Revenues/Expenditures (Average Per Trip)** **Check trip type to right** **Primary Target Species**	☐**1/2 day** ☐**3/4 day** ☐**Twilight** ☐**Night** ☐**Overnight** ☐**Day and a half** ☐**Multiday** ☐**Long Distance** **Sp:**_____	☐**1/2 day** ☐**3/4 day** ☐**Twilight** ☐**Night** ☐**Overnight** ☐**Day and a half** ☐**Multiday** ☐**Long Distance** **Sp:**_____	☐**1/2 day** ☐**3/4 day** ☐**Twilight** ☐**Night** ☐**Overnight** ☐**Day and a half** ☐**Multiday** ☐**Long Distance** **Sp:**_____
62.	Total officer and crew size? (including captains)			
63.	Proportion of trips that are open party v. full vessel charter?			

H.Owner Opinion

Please check the appropriate box.

#	Question	Response
64.	How do you view the business effects of fuel costs?	☐Very Challenging ☐Somewhat Challenging ☐Neutral ☐Somewhat Favorable ☐Very Favorable
65.	How do you view the business effects of bait fish stock?	☐Very Challenging ☐Somewhat Challenging ☐Neutral ☐Somewhat Favorable ☐Very Favorable
66.	How do you view the business effects of fishery regulations (including MPAs)?	☐Very Challenging ☐Somewhat Challenging ☐Neutral ☐Somewhat Favorable ☐Very Favorable
67.	How do you view the business effects of non-fishery government regulations?	☐Very Challenging ☐Somewhat Challenging ☐Neutral ☐Somewhat Favorable ☐Very Favorable
68.	How do you view the business effects of environmental conditions?	☐Very Challenging ☐Somewhat Challenging ☐Neutral ☐Somewhat Favorable ☐Very Favorable

#	Question	Response
69.	How do you view the business effects of ocean and fish stock health?	☐Very Challenging ☐Somewhat Challenging ☐Neutral ☐Somewhat Favorable ☐Very Favorable
70.	How do you view the business effects of Mexican visa and Mexican permit costs?	☐Very Challenging ☐Somewhat Challenging ☐Neutral ☐Somewhat Favorable ☐Very Favorable
71.	How do you view the business effects of competition from other CPFV vessels?	☐Very Challenging ☐Somewhat Challenging ☐Neutral ☐Somewhat Favorable ☐Very Favorable
72.	How do you view the business effects of competition from other US fisheries?	☐Very Challenging ☐Somewhat Challenging ☐Neutral ☐Somewhat Favorable ☐Very Favorable
73.	How do you view the business effects of competition from foreign ports / fisheries?	☐Very Challenging ☐Somewhat Challenging ☐Neutral ☐Somewhat Favorable ☐Very Favorable

I. Business Structure and Outlook

Please check the appropriate box.

#	Question	Response
74.	How is your business structured?	☐C Corporation ☐Sole Proprietorship ☐Limited Liability Partnership (LLP) ☐Limited Liability Company (LLC) ☐S Corporation Other:_____
75.	Approximately, what percent of your 2012 total household income is generated from the charter boat operations?	☐1% - 20% ☐21% - 40% ☐41% - 60% ☐61% - 80% ☐81% - 99% ☐100%
76.	Compared to 5 years ago, how many clients are you servicing in a year?	☐Many Fewer ☐A Bit Fewer ☐About the Same ☐A Bit More ☐Many More
77.	What percent of your customers are return customers?	☐1% - 20% ☐21% - 40% ☐41% - 60% ☐61% - 80% ☐81% - 99% ☐100%
78.	How do you see the economic outlook for the charter boat industry over the next 5 years?	☐Very Unfavorable ☐Somewhat Unfavorable ☐About the Same ☐Somewhat Favorable ☐Very Favorable

79.	How do you see the federal management of species targeted by the California CPFV fishery over the last 2 years?	☐Very Unfavorable ☐Somewhat Unfavorable ☐Indifferent ☐Somewhat Favorable ☐Very Favorable

May we link your answers to the information contained in the CA DFG CPFV Logbook database? The information provided will be kept confidential. The ability to link your cost and earnings information to your reported logbook information will allow for improved modeling and understanding of the CA CPFV fishery.

__Yes __No

Signature:_____

OMB Control #0648-0369 expires 2/28/2013.Notwithstanding any other provisions of the law; no person is required to respond to, nor shall any person be subject to a penalty for failure to comply with a collection of information subject to the requirement of the Paperwork Reduction Act, unless that collection of information displays a currently valid OMB Control Number. Public reporting burden for this survey is estimated to average 60 minutes per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to James Hilger, SWFSC FRD, 8901 La Jolla Shores Drive, San Diego, CA 92037.

West Coast Charter Boat Cost-Earnings Pilot Survey for FY 2011

Hanan & Associates, Inc.
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By
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July 30, 2012

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Final Report Submitted to

James Hilger
National Marine Fisheries Service
Southwest Fisheries Science Center

EXECUTIVE SUMMARY

Because of a dearth in the current economic data for the California Passenger Fishing Vessel (CPFV) fleet, a pilot study was performed in San Diego County to test appropriateness and efficacy of a survey instrument and its administration. Results of this study are intended for further utilization in a similar study among the whole CPFV fleet along the California coast. Although only eight fishing firms (representing ten fishing vessels) were surveyed in this pilot study, the study showed differential costs and earnings dependent on length of time at sea (fishing trip type) and fish species targeted or fishery participation. The survey instrument and techniques are reviewed with suggested changes for future surveys.

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INTRODUCTION

The National Marine Fisheries Service (NMFS) must measure the economic performance of the For-Hire Sectors (FHS) in west-coast recreational fisheries to meet legal and regulatory requirements, support the Pacific Fisheries Management Council management processes, and provide data for fundamental economic research. In California, a significant portion of the FHS is comprised of the Commercial Passenger Fishing Vessel (CPFV) fleet (also called partyboats or charter boats). Very little recent/current cost earnings data is available for the California CPFV industry, with the last major data collection occurring in 2000 (Pacific States Marine Fisheries Commission, 2004) while Oregon collected data in 2010 (The Research Group, 2011) and Washington in 2008 (TCW Economics and The Research Group, 2008).

To begin the process of gathering California CPFV economic data, NMFS, Southwest Fisheries Science Center, contracted with Hanan&Associates, Inc. through Ocean Associates, Inc. to conduct a pilot study for a cost earnings survey instrument and survey of selected San Diego County CPFV owner/operators. This cost-earnings project was to be a pilot survey implemented as a first-step to obtaining accurate data regarding the economic status the CPFV fisheries and is briefly described below. The survey instrument is accompanied by this report. The resulting database had a very small sample size and was presented to NMFS, Southwest Fisheries Center. The data are confidential and can only be released in aggregate form using the *Magnuson-Stevens* Fishery Conservation and Management Act (amended 2006) rule of three boats for aggregation.

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METHODS

The survey instrument (Appendix I) was developed to obtain basic detailed information regarding cost and earnings data for each fishing business (some businesses own multiple CPFV) by type of fishing trip or fishery pursued. The instrument was five pages in length with an introductory letter (Appendix III) and an additional page for owner/operator comments (see Appendix IV). The survey was intended to be administered as an in-person interview or to be filled out in private by the owner/operator. Each survey was projected to take about one hour to complete and we suggested that each potential participant have their 2011 profit and loss (P&L) statement available to facilitate filling out the form.

To comply with the US Paperwork Reduction Act, the survey population targeted nine businesses (CPFV owner/operators) identified after attending a local industry meeting (Sportfishing Association of California) describing the study, and seeking volunteers. We attempted to contact the volunteers by telephone and set up personal (in-person) interviews to administer the survey. When volunteers could not be contacted by telephone or were unable to complete the survey process, additional backup owner/operators were contacted as substitutes for the original volunteers.

All data were entered into a preliminary database using Microsoft Excel© following the interview or upon receiving the completed survey form. A key to the database was presented with the database. Generally, the database is segregated in worksheets that correspond to specific section of the survey and are titled: Owner Data, Vessel ID (a random number for all but one vessel which chooses not to be anonymous), Species Importance Rankings, Vessel Expenses/Revenue, Non-fishing Revenue, and Species Abbreviations. Where appropriate, each worksheet is segregated by question, vessel ID, and question number.

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RESULTS

Response Rates

Initially, nine volunteer CPFV firms/businesses were obtained and contacted later by telephone; three agreed to personal interviews and one emailed us their 2011 P&L statement. Because that individual was unavailable to meet and answer survey questions not found in the P&L statement, corresponding data from that P&L statement and some data from online public sources were entered into the database. Of the remaining five owner/operators, two did not answer nor return multiple phone calls including voice messages, two stated that their partners did not wish them to participate, and the fifth was leaving town and in reconsideration, apologetically did not have time to complete the survey. We contacted seven additional volunteer CPFV owner/operators by telephone; five of the seven agreed to participate: two by personal interview, two by telephone interview, and the fifth did not respond by time of this writing probably because recreational fishing was getting very busy.

In total, we obtained survey data from eight CPFV businesses/firms representing ten vessels (there was multiple boat ownership). The five personal survey interviews lasted one to two hours including time spent socializing, and discussing improvements to the survey instrument. Actually conducting the survey instrument took about one hour in the personal interviews and about 45 minutes when done by telephone. We did not ask those that filled out the survey in private how much time they spent on it; this might be a question to add for future surveys.

Suggestions for Increased Response Rates

Timing of the Pilot Study was scheduled for early April near personal income tax deadlines. Perhaps the survey should start even sooner as many businesses' fiscal year ends at the end of December and their business tax information would be readily available. We are suggesting this because the recreational fisheries get busier in the spring and by the end of spring are very busy and the owner/operators are less available or possibly willing to participate.

More outreach may help. We attended one industry meeting with the idea that we only wanted to target nine CPFV firms which could be obtained quickly from the volunteers. For larger surveys we would recommend attending more meetings and having more personal contact with owner/operators. Post card mailers and letters of introduction will also help especially for larger surveys.

One question that we heard frequently was: why do you need this information, will it result in more regulations? Perhaps the fishery council and state agencies need to reach out to CPFV owner/operators to explain what will be done with the information and why it is needed. Also, past surveys and similar surveys in other states need to be distributed to CPFV owner/operators so they can see the utility and benefits of participating. They need to see, not just hear from survey personnel, explanations of how the data are being used and what the council and state agencies are doing for them with their data.

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Data Summary

For this report, we are presenting selected data as simple averages or means and standard deviations (in parentheses) of the eight owner/operator businesses and ten CPFV represented in the database (keeping in mind that this was a very small sample size). Some of the data were not available for certain vessels or businesses and treated as non-values for the statistics. We are presenting aggregate summary data for selected questions in order provide qualitative summary information to aid in improving the data collection instrument as examples of the types and quality of data that can be obtained from this type of survey. Reported summary statistics must be viewed in the context of the small sample size and untested data collection instrument with which they were collected. The goal of this pilot study report is to report on the test of survey techniques, ease of administering and evaluating the survey, and efficacy in a potential larger west-coast survey.

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Owner Data

For the person providing the information, the length of time associated with or in the CPFV industry was 33 (4.8) years and the amount of time owning a CPFV vessel was 14.7 (8) years.

Vessel Characteristics

The year of purchase for the current CPFV owner was 2000 (7.5) at a cost of $553,333 (444,191) with an insured value of $933,889 (934,106). Total horse power of main engines was 843 (327) hp and all CPFV had two diesel engines, which were upgraded in 2008 (4). Cruising speed was 9.3 (0.8) knots. CPFV had a capacity of 46.2 (14.5) people aboard including crew. Total fishing trips were 11.7 (28.8) in 2011.

Species Importance Rankings

Respondents were asked to identify what species – trip type pairs were most important from a business perspective for each vessel (Figure 1). The primary role of this question was to aid the interviewer and respondent identify what species – trip type pairs would be addressed in

the following sections (Q 35 - 53). We are presenting this table to show the owner/operators evaluation of fish or fishery importance to the type of fishing trip. Cells in the table are averaged over the 10 boats when reported (for example tuna is the most important fish for the multi-day and long distance trips). The goal or object of this question was difficult to communicate to the owner/operator when administering the survey and probably took more time than what was expected for the results which seem ambiguous, but it may have more utility with larger sample sizes. The CPFV operators are opportunistic fishermen, they will usually fish where they think customers can achieve the best catch by volume or by value; thus encouraging repeat customers.

Of the 10 vessels represented in this survey, a total of five ran half-day trips, six ran three quarter day trips, four ran twilight trips, two ran overnight trips, four ran day and a half trips, five ran multiday trips, and a single vessel ran long distance trips. Of the five vessels running half-day trips, two reported calico bass, three reported groundfish, three reported barracuda, three reported sand bass, and three reported bonito as their most important species for this type of trip. When examining three-quarter day trips yellowtail was reported by four of the vessels as one of the most important species, calico bass was reported by two, groundfish was reported by three, and halibut was reported by one. For twilight trips groundfish was reported three times, barracuda was reported three times, sand bass was reported three times, bonito was reported three times, and calico bass was reported one time as the most important species for these trips. Overnight trips were targeting yellowtail and tuna, where tuna was reported by two vessels and yellowtail by one as their most important species. When looking at the day and a half, multiday, and long distance trips, it was very evident that tuna and yellowtail are the targeted and most important species for these trip types. Tuna was rated by all four of the day and a half boats, all five of the multiday boats, and the single long distance boat as the most important species. Yellowtail was reported by one of the day and half boats and two of the multiday boats as another very important species and recommended that it be listed on the table.

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Species	1/2 Day	3/4 Day	Twilight	Overnight	Day	Day & 1/2	Multiday	Long Distance	Ranked 1-3 with 1 being most important
Seabass (SB)	2	2.25	2	3		3	3		
Billfish (BF)	3	3	3	3		3	3		
Groundfish (GF)	1.6	1.7	1.25	2		2	2		
Halibut (H)	2.3	2.2	2	3		3	3		
Salmon (SL)		3		3		3	3		
Shark (SH)	3	3	3	3		3	3		
Squid (SQ)	3	3	3	3		3	3		
Tunas (T)	3	3	3	1		1	1	1	
Yellowtail (YT)	2.3	1.4	2.3	1.5		1.7	1.5		
Barracuda (BR)	1.8	3	1.5						
Sand Bass (SnB)	1.3	2	1						
Calico Bass (CB)	1	1	1						
Bonita (BN)	1		1						
Dolphins (D)				2		2	2		

Figure 1. Species Importance Rankings.
Numbers represent mean of ranked values for vessels reporting that category.

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Vessel Expenditures[1]

For vessels with mortgages, monthly principle cost was $3,746 (2,509) and interest $1,998 (2,133). For those with mooring fees, they were $22,239 (15,774) per year; some fees were included as part of a combined booking, landing, and parking fee. Booking fees if separate were $68,499 (34,357). Haul out costs were $9,500 (4,848) at two-year intervals. Engine overhaul costs were $12,333 (11,846); electronic maintenance was $3,400 (6,542); and all other maintenance $24,117 (16,595). Purchase of new gear was $23,658 (34,800); taxes, fees, and permits were $22,721 (27,273). Vessel expenses not listed in the instrument were an additional $45,576 (29,913).

Trip based expenses for the fleet consist of fuel, fishing supplies, foreign licenses, galley supplies, live bait, other bait, ice, wages (captain, second skipper, deck hands, and cook) and crew meals (not reported by all vessels). An average half day trip required 25 (0.5) gallons of gas costing an average of $102 (4) and $14,450 (1,7249) annually; cost of goods sold in the galley were $42 (2.5) per trip and $5,998 (7126) annually; live bait expenses were $153 (31.67) per trip and $23,843 (29483) annually; wages were $178 (34.5) per trip and $23,615 (27,459). A three-quarter day trip required 67 (23) gallons of gas approximately $220 (35) and annually $17,040 (1,663); cost of goods sold in the galley were $46 (8) per trip and $3,615 (888) annually;

[1] Please note reported summary statistics must be viewed in the context of the small sample size and untested data collection instrument with which they were collected.

live bait expenses were $182 (24) per trip and $14,296 (2896) annually; wages were $298 (6.9) per trip and $23,220 (987.3) annually. As the multiday trips considered in this study, range from overnight to five days for accuracy data rather than averages should be viewed in the submitted database.

Vessel Revenue[1]

Again average annual revenues are reported for the fleet and are mostly derived from fishing based trips; however, some CPFV reported earnings from non-fishing operations (such as whale watching, educational trips, burials at sea, science based trips, and parties). A few reported earnings from galley and souvenir sales, although these numbers were very small. Fishing trips including: half-day, three-quarter day, overnight, day and a half, and multiday trips raised an annual total of $210,728 (210,449) per boat, which broken down by trip were $6,793 (9,505). Half-day trips earned $146,000 (170,374) annually and $1,011 (619) per trip. Three-quarter day trips earned $93,100 (53,169) annually and $1,193 (703) per trip. Multiday fishing trips, ranging from overnight to five days, were $287,204 (245,605) annually and $11,785 (10,926) per trip. Galley sales were included in the price of many of the fishing trips; however, when reported separately were $10,931(10,085) annual and $113 (75) per trip. For those that reported non-fishing revenue, annual total was $55,600 (72,247); however, if we include those not reporting as zero earnings in the calculation, this average declines to $22,240 (50,638). Fish filleting charges are not reported or recorded by the vessels, because this is usually paid directly to the deck hands. A single vessel reported earnings of $50 per trip through sale of souvenirs.

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Use of Pilot Study Survey Results

This pilot study of California CPFV cost and earnings and the data collection instrument administered on the San Diego CPFV feet could aid NMFS in the design and administration of a larger scale data collection. NMFS needs to measure the economic performance of west coast recreational fisheries in order to meet legal and regulatory requirements, support fisheries management decision making, and undertake economic research. Currently available cost earnings data is not adequate for the CPFV fishery and does not meet these needs. This pilot survey begins to meet those needs and shows utility in achieving those needs. Much has happened in the CPFV industry since the year 2000 cost-earning survey: marine protected areas

have been put in place, area and bag limits have changed, Mexico is requiring visas, and some exploited fish stocks that were depleted have recovered or are well on their way to recovery. Further expansion of this survey is likely a beneficial endeavor and is recommended for the whole CPFV fleet in California.

Implementing Survey Instrument for Future Projects

A number of important data points, as well as, information regarding administering the survey instrument came from this pilot study. Initially it was developed to interview owner/operators in person to gain an understanding of the status of their business. It was evident during and after the first interview that, as expected, some modifications were required. We reorganized the order to have the interview flow more smoothly, allow for discussion, and data gathering. Several of questions required more discussion and explanation than we expected, so we rephrased and modified them somewhat for the final instrument used in the rest of the surveys. Also, after administering the first survey we recognized the importance of providing the survey instrument to the owner/captain ahead of time in order to facilitate understanding of the questions we were going to ask. Many of the owners/captains keep very good logs, have detailed P&L statements or both; having these during the interview proved to be very helpful when looking at financial numbers. Identifying the number and type of trips completed during the year was not always an easy question and in some situations required reaching out to the landing and obtaining a printed report. As many of the vessels have agreements with the landings for mooring, parking, and trip sales, these reports were readily available and were very useful. Further, some of the vessels have websites listing the trip types and results from each trip. We would recommend identifying and or obtaining the reports and websites, when/if available, for additional detailed information.

When administering the survey, it was very important to stress that we were only gathering data from 2011 and we did not want numbers from other years. Second, the addition of total fuel usage or cost for the year was an important addition to the final instrument as suggested by the first interviewee. Third, the addition of a “home office” write offs section in the survey will add more depth to the final instrument, as the numbers can affect the bottom line of the business. Total payroll, although a simple number to obtain, continually required further

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discussion and calculation in order to obtain all: wages, bonuses, benefits, payroll taxes, retirement payments and insurance numbers. As mooring fees, booking fees and, on occasion, parking fees are often combined into a single number or percentage of gross income, a good understanding of the process for each vessel/business needs to be obtained in order to have accurate figures. When interviewing the different owner/operators, it became evident that the "Trip Types for 2011" section of the survey instrument was a point of confusion. As sportfishing is an opportunistic endeavor, owner/operators had difficulty assessing the importance of each species for the different type of trip. Many captains target a single species; however, when they do not find this species or have negative reports of fish availability, depending on season a different species is selected and becomes more important. As such, assigning a single number to the noted species was difficult and may not truly represent the importance of each. Lastly, a single section for total revenue, total expense, total depreciation, and total taxes may be a useful addition for comparative studies between the vessels and businesses. Overall, the survey instrument proved to be a powerful and effective means for obtaining the information targeted for this pilot study. We would recommend that the questions be developed so that no or little calculations are necessary during the interview. This could be done by just asking for the data necessary to make the calculation, then those that use the database can make that calculation if they need it. This would save considerable time in filling out the survey instrument (please see Appendix II for further details on survey instrument question and technique critiques).

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Comments on the State of the Fishery and Owner Outlook

Several aspects regarding the San Diego CPFV fishery are immediately evident based upon initial evaluation of the pilot study data. However; due to the small sample size of 8 firms, the results should be viewed as anecdotal and qualitative. First, fishery participation is apparently an "aging" one. Most owner/operators have been involved in the CPFV fishery for more than thirty years. Many have owned and operated their current vessel for more than 10 years with one owning and operating for 30 years. Of the owner/operators interviewed, percentages of household income generated from the CPFV operations ranged from 21% to 100%. Second, increases in foreign fishing permits, visa requirements, as well as, fuel cost leading to surcharges have caused the respondents to see " a bit fewer" to "many fewer" clients

being serviced each year. Further, they feel that the outlook over the next five years is looking "somewhat unfavorable" for the industry.

Regarding regulations, many feel that rules and restrictions being put in place are having impacts on their personal businesses and the industry as a whole. Their businesses are further impacted by not allowing enough time for previous regulations to take affect before new regulations are put in place. Therefore, they are continually attempting to keep up with the new changes instead of being allowed to evolve their business models to respond to existing regulations. Many of the new closures have caused them to make fishing location decisions based more on fuel costs than fishing conditions.

CONFIDENTIALITY

All but one CPFV business requested their information to remain anonymous which we respected and did not include those boat names nor owner/operator names in the database.

It is anticipated that the information collected will be disseminated in aggregate statistical form to the public or used to support publicly disseminated information according to the rule of three firms or businesses for aggregation of the data. As explained in the previous paragraphs, the information gathered has utility. NMFS will retain control over the information and safeguard it from improper access, modification, and destruction, consistent with NOAA standards for confidentiality, privacy, and electronic information. In particular, although the data are voluntary, it will be kept confidential as with section 402(b) of the Magnuson-Stevens and NOAA Administrative Order 216-100, Confidentiality of Fisheries Statistics, and will not be released for public use except in aggregate statistical form without identification as to its source.

Contact information for agency coordinator and principle investigator:

Agency Coordinator:
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CONCLUSIONS

This study was beneficial as a pilot study because we were able to perform the survey and develop the survey instrument, working with industry to improve our survey techniques and survey instrument, while gaining important preliminary information about the CPFV fleet in Southern California. We suspect that administering the pilot study instrument in northern California would have revealed additional information pertinent to that region as fisheries and fishing techniques differ by region. However, the data gathered should have immediate utility for fisheries management at both the state and federal fishery council management levels.

ACKNOWLEDGEMENTS

We sincerely thank the CPFV owners and operators who were willing to work with us on this pilot study. As mentioned earlier, nearly all requested to remain anonymous, so their names and vessel names are not being presented. It is not easy to open your books and give out information that is this sensitive to one's business. We commend the participants because they recognize that the data are necessary for adequate and successful management of our ocean resources and that management is best that is informed management.

Funding for the project was provided from National Marine Fisheries Service through a NOAA contract with Ocean Associates, Incorporated.

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LITERATURE CITED

The Research Group. 2011. Oregon marine recreational fisheries economic contributions in 2009 and 2010. Oregon Department of Fish and Wildlife and Oregon Coastal Zone Management Association. September 2011. 44 Pages.

TCW Economics and the Research Group. Economic Analysis of the Non-Treaty Commercial and Recreational Fisheries in Washington State. Prepared for Washington Department of Fish and Wildlife. December 2008.

APPENDIX I SURVEY INSTRUMENT:

San Diego Charter and Party Boat Economic Pilot Study

Southwest Fisheries Science Center, NOAA Fisheries

All questions pertain to the 2011 calendar year
All answers are strictly confidential

Background Questions:

#	Question	
1.	How long have you been involved in the CPFV industry in any capacity?	(years)
2.	How long have you owned a CPFV operation?	(years)
3.	How many CPFV vessels do you own?	
4.	Do you serve as the primary vessel captain for a CPFV vessel?	☐ Yes ☐ No
5.	Name of the vessel(s) you own?	

BUSINESS BASED ANNUAL EXPENDITURES
-Expenses that are split between all vessels.

#	2011 Business Expenses	2011 Business Expenditures
6.	Professional Services (legal, accounting, etc.)	$
7.	Office labor and other labor expense	$
8.	Telephone and other communications	$
9.	Advertising services or charges	$
10.	Industry Association fees/memberships	$
11.	Insurance (Vessel, Property, Liability, etc)	$
12.	Total Payroll (include wages, bonuses, benefits, payroll taxes, retirement payments and life, health, and unemployment insurance)	#
13.	Other Business related expenses (specify)	$
14.	Other Business related expenses (specify)	$

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VESSEL CHARACTERISTICS

#	Vessel	#	#
15.	Year purchased?		
16.	Vessel purchase cost for present owner?	$	$
17.	Insured vessel replacement value?	$	$
18.	Horsepower of the main engine(s)?	HP	HP
19.	Year of engine upgrade/replacement?		
20.	Cruising speed (knots)?	knots	knots
21.	Type of fuel?		
22.	Operating capacity of the vessel while fishing (including captain and crew)?	# people:	# people:
23.	Total number of non-fishing revenue generating trips taken in 2011?		

VESSEL BASED ANNUAL EXPENDITURES

#	2011 Vessel Expenditures		
24.	Annual/Monthly Principal Payment on note	$/mnth	$/mnth
25.	Annual/Monthly Interest Payment on note	$/mnth	$/mnth
26.	Mooring	***$***	***$***
27.	Booking fees for your vessel	$	$
28.	Haul out costs/Frequency (yrs)?	$ / yrs	$ / yrs
29.	Engine overhaul	$	$
30.	Electronics maintenance	$	$
31.	All other vessel maintenance	$	$
32.	Purchase of new gear or equipment (electronics, deck gear, engines, angling equipment, etc.)	$	$
33.	Taxes, government fees and vessel permits (U.S.: local, state, and federal)	$	$
34.	Taxes, government fees and vessel permits (foreign)	$	$

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Vessel:_____

TRIP TYPES FOR 2011

For 2011, please indicate on a scale of 1-3 the business importance of each species/length trip type for the above vessel.

	½ day	¾ day	Twilight	Overnight	Day & 1/2	Multiday	Long Distance
Seabass (SB)							
Billfish (BF)							
Groundfish (GF)							
Halibut (H)							
Salmon (SL)							
Shark (SH)							
Squid (SQ)							
Tunas (T)							
Other (O)							

TRIP BASED EXPENDITURES

Report trip based expenditures for the following category of trip.

#	**Average EXPENSES per Trip** **(Circle type to right)** **(use additional pages as needed)** **Primary Target Species**	**1/2, 3/4, twilight, overnight, day and a half, multiday___day** **Sp:_____**	**1/2, 3/4, twilight, overnight, day and a half, multiday___day** **Sp:_____**	**1/2, 3/4, twilight, overnight, day and a half, multiday___day** **Sp:_____**
35.	Fuel	_____gallons Or $	_____gallons Or $	_____gallons Or $
36.	Fishing supplies	$	$	$
37.	Food and drink for galley sales	$	$	$
38.	Live Bait expenses	$ or %Rev	$ or %Rev	$ or %Rev
39.	Other Bait expenses	$	$	$
40.	Ice machine _____or Ice_____	$	$	$
41.	Captain wages/payment (Circle $ or %)	**$/%_____**	**$/%_____**	**$/%_____**
42.	Second skipper wages/payment (Circle $ or %)	**$/%_____**	**$/%_____**	**$/%_____**

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#	**Average EXPENSES per Trip** **(Circle type to right)** **(use additional pages as needed)** **Primary Target Species**	**1/2, 3/4, twilight, overnight, day and a half, multiday___day** **Sp:_____**	**1/2, 3/4, twilight, overnight, day and a half, multiday___day** **Sp:_____**	**1/2, 3/4, twilight, overnight, day and a half, multiday___day** **Sp:_____**
43.	Deck Hand(s wages/payment (Circle $ or %)	#_____ $/%_____	#_____ $/%_____	#_____ $/%_____
44.	Cook wages/payment (Circle $ or %)	$/%_____	$/%_____	$/%_____
45.	Other crew: wages/payment (Circle $ or %)_____	#_____ $/%_____	#_____ $/%_____	#_____ $/%_____
46.	Other trip related expenses_____	$	$	$
47.	Other trip related expenses_____	$	$	$

REVENUES – FISHING OPERATIONS

#	**REVENUE** **(Per Trip / Annual Total)** **Primary Target Species**	**1/2, 3/4, twilight, overnight, day and a half, multiday___day** **Sp:_____**	**1/2, 3/4, twilight, overnight, day and a half, multiday___day** **Sp:_____**	**1/2, 3/4, twilight, overnight, day and a half, multiday___day** **Sp:_____**
48.	Total Number of Trips	Trips	Trips	Trips
49.	Average Number of Passengers per Trip	Pass/Trip	Pass/Trip	Pass/Trip
50.	**Ticket Sales & Trip Fees** **(Per Trip / Annual Total)**	$	$	$
51.	Food/Beverage sales (not included in ticket sales) **(Per Trip / Annual Total)**	$	$	$
52.	Souvenirs **(Per Trip / Annual Total)**	$	$	$
53.	Filet Charges (to vessel operator) **(Per Trip / Annual Total)**	$	$	$

2011 Additional Revenue – NON-FISHING OPERATIONS

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The following questions pertain to sources of other revenue generated by the charter boat operation. Please indicate revenues collected from sales not directly linked to fishing operations.

#	NON-FISHING	Number of Trips by Type	Average # Passengers per Trip	2011 Total Annual Revenue
54.	Nature/whale watching	Trips	Pass/Trip	$
55.	SCUBA or Free diving	Trips	Pass/Trip	$
56.	Burial at sea	Trips	Pass/Trip	$
57.	Commercial, specify_____	Trips	Pass/Trip	$
58.	Renting of vessel			$
59.	Hotel that is owned by charter boat owner			$
60.	Equipment Rental			$
61.	Other (specify):			$

The following questions are designed to help us further characterize and analyze the charter boat fleet.

#	Question	Response
62.	Compared to 5 years ago, how many clients are you servicing in a year?	☐Many Fewer ☐A Bit Fewer ☐About the Same ☐A Bit More ☐Many More
63.	How do you see the economic outlook for the charter boat industry over the next 5 years?	☐Very Unfavorable ☐Somewhat Unfavorable ☐About the Same ☐Somewhat Favorable ☐Very Favorable
64.	Approximately what percent of your 2011 total household income is generated from the charter boat operations? (Please check appropriate box)	☐1% - 20% ☐21% - 40% ☐41% - 60% ☐61% - 80% ☐81% - 99% ☐100%

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If you have any additional comments please feel free to include them here:

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OMB Control #XXXX-XXXX expires X/XX/XX. Notwithstanding any other provisions of the law; no person is required to respond to, nor shall any person be subject to a penalty for failure to comply with a collection of information subject to the requirement of the Paperwork Reduction Act, unless that collection of information displays a currently valid OMB Control Number. Public reporting burden for this survey is estimated to average 60 minutes per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to James Hilger, SWFSC FRD, 8604 La Jolla Shores Drive, San Diego, CA 92037

APPENDIX II QUESTION CRITIQUE:

Question Number: Comments

1-5: These questions were very simple with responses easily obtained. **No need for modification.**
6: This question continually required discussion and explanation as not all participants understood what was classified as "professional services" but with a small amount of discussion data for this question was easily obtained. **No need for modification.**
7: As not all owner/operators utilize an office or have and office based labor expense, this question has room for improvement. **We would recommend adding a portion to this question regarding rent paid, if any, on office space. This may also be the right area to add a question about any business based write-offs for home office space.**
8: Communication expenses were easily provided by owner/operators, common discussions around this question were: whether satellite communications and internet/networking should be included. **For future use, we would recommend clarifying further that all types of communications, including satellite and any internet/network based expenses should be included here.**
9: As noted by a number of owners/ operators, many businesses are beginning to use "Groupon" type advertising campaigns, although we did not have any users in our sample, we believe any costs associated with this type of advertising should be included here. **No need for modification.**
10: **No need for modification.**
11: **No need for modification.**
12: Total payroll, although a simple number to obtain, continually required further discussion and calculation in order to obtain all: wages, bonuses, benefits, payroll taxes, retirement payments and insurance numbers. **Perhaps ask for more, inclusive responses and do the calculations later.**
13-14: These two spaces provided adequate room to add any business related expenses that had not been addressed prior. **No need for modification.**
15: **No need for modification.**
16: **No need for modification.**
17: **No need for modification.**
18: Obtaining the horsepower of the main engines is an easy answer, however; further questioning was needed to validate 1 or 2 main engines and the total power of both. **No need for modification.**
19: **No need for modification.**
20: **No need for modification.**
21: **No need for modification.**
22: **No need for modification.**
23: Most of the owner/operators in this sample had not taken many, if any, non-fishing trips. We expect this to be different when applied on a larger scale. **We would recommend that this question be removed from the survey as it is redundant to the table "2011 Additional Revenue – Non-Fishing Operations."**
24: **No need for modification.**
25: **No need for modification.**
26-27: As mooring fees, booking fees and, on occasion, parking fees combine into a single number or percentage of gross income, a good understanding of the process for each vessel/business needs to be obtained in order to have accurate figures. **We would**

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recommend that these questions be modified to also include identifying the percentages paid to the landing and any other bodies.
28: **No need for modification.**
29: **No need for modification.**
30: **No need for modification.**
31: **No need for modification.**
32: As maintenance may or may not require the purchase of new gear, it was important to validate with owner/operators that this section include only the purchase of new gear and equipment and was not to include any items purchased for the maintenance of existing gear. **No need for modification.**
33-34: Needed to confirm that the owner/operators did not provide us with Industry or Association fees. **We would recommend that this question be modified or another question be added to include foreign fishing licenses.**
35: **No need for modification.**
36: As fishing supplies are usually not purchased on a trip based basis, but an annual basis, we feel that this question is redundant of question 32. **We would recommend adding "fishing supplies" to question 32.**
37: **No need for modification.**
38: **No need for modification.**
39: This number continued to be very small and insignificant when compared to the overall costs for the year, however; on a larger scale and in different regions with different techniques this question may prove to be very useful. **No need for modification.**
40: We felt that this question was not very direct and allowed for different interpretations of this the response we were soliciting. **We would recommend this question to be re-written as "what type of fish cooling system do you use?"**
41-45: **No need for modification.**
46-47: Although these questions are a useful catch all space and should not be modified. **We would recommend adding a question regarding crew meals on a per trip basis.**
48: Identifying the number and type of trips completed during the year was not always an easy question and in some situations required reaching out to the landing and obtaining a printed report. As many of the vessels have agreements with the landings for mooring, parking and trip sales these reports were readily available and were very useful. **No need for modification.**
49: **No need for modification.**
50: This question provided some difficulties, in the fact that some calculations were required to obtain trip type data. **We would recommend a single section for total revenue, total expense, total depreciation, and total taxes; with this data, calculations can be completed by the survey administrator ensuring accuracy over ticket sales and trip fees.**
51-53: Very few owners/operators reported any revenue from Food/Beverage sales, souvenirs, or filet charges, however; we would expect this may differ on a larger scale. **No need for modification.**
54-61: **No need for modification.**
62-64: **No need for modification.**
Additional Comment section: This proved to be a very useful area of the survey where owners/operators were able to make any comments that the felt would be useful to the analyst of the data. **No need for modification.**

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APPENDIX III INTRODUCTORY LETTER:

«FIRSTNAME» «LASTNAME» «SUFFIX»
«COMPANY»
«ADDRESS»
«CITY», «STATE» «ZIP»

«GREETING» «FIRSTNAME»«COMPANY»,

You have been selected to participate in a confidential pilot study of the recreational commercial passenger fishing vessel (CPFV) industry in San Diego, California. This important assessment will provide data necessary to gauge:

- **The contribution of the fishery on the San Diego economy, and**
- **The impact that changes in economic, regulatory, and fishery conditions may have on the industry.**

By participating, you will provide information that is vital to understanding the fishery.

This pilot study will also help in designing a planned 2013 study for all of California, Oregon, and Washington, which will provide information required to understand the CPFV fishery across the entire Pacific Coast.

To preserve the **confidentiality** of your information, Hanan & Associates, a firm with experience conducting similar studies with several California commercial fisheries fleets, will conduct study interviews and strip all identifying information in the generation of the study database. Dr. James Hilger of the NOAA Southwest Fisheries Science Center (SWFSC) in La Jolla, California will run study design and analysis.

To insure the accuracy of the information collected, all questionnaire interviews will be completed through in person interviews during the month of April, 2012. You will be receiving a phone call or email in the next several weeks to schedule your interview. Upon scheduling your interview, a detailed list of the type of records to have on hand for your interview will be provided. The interview should take approximately **{XX – XX}** minutes to complete.

Participation in the study is **voluntary** and all responses are **completely confidential**. Information from the questionnaire will only be released as summaries in which no individual's or business's answers can be identified. For additional information about the study, please see the list of Frequently Asked Questions (FAQ) included in this letter.

Please feel free to contact Doyle Hanan at (858) 832-1159 or James Hilger at (858) 546-7140 with any additional questions. Thank you very much for your time.

Sincerely,

Doyle Hanan, PhD.
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PO Box 8914
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APPENDIX IV TRANSCRIBED COMMENTS FROM RESPONDENTS:

Vessel 1 – April 2012

Stocks seem to be in good shape, however; we are seeing a down cycle which will take time to return, as it has many times in the past. Entertainment and overall quality of the trip becomes more important during these down cycles. Need to ensure a quality of service in the industry, which starts with the politeness of the crew.

Vessel 3 – May 2012

Mexican visas are comparatively an enormous cost and are very detrimental to the shorter trips. We need to work with Mexico, in order to decrease costs and increase fish stocks. Groupon has been discussed and observed in use by other vessels; however, the boats are not making any money on the Groupon passengers and we have not seen an increase in clients.

Vessel 4 – May 2012

Price of fuel is a major deterrent to passenger numbers. When fuel surcharges are made known ahead of time, we see a higher number of cancellations due to the already high cost for passengers to travel to the docks. New MPA's being put in place will have the ability to increase or decrease the cost of trips, captains will need to make the decisions on how to fish around the MPA's, and the business owner will need to modify the pricing. All owner/operators need to diversify their companies in order to remain in business, without educational and spreading ashes at sea, this captain would need a part time job. Technology can play a large part in the changes being made in the fishing industry, however; the initial monetary outlay and time requirements are very difficult for small businesses.

Vessel 5 – May 2012

Times are getting tougher and the hidden costs are making it more and more difficult to survive in an already small industry. Because this is a small industry, it may have a higher propensity for overall failure. The small voices of each individual boat owner need to be heard in the overall decisions being made and implemented in the industry.

Vessel 6 – June 2012

Too many changes are being put in place. Policy makers are not giving each individual change/policy time to resonate and allow business owners to digest and change their structures to fit these new policies. The pendulum is swinging towards over protection, causing "environment extremists" to emerge. It has become more difficult to differentiate between conservationist and "environment extremists."

Vessel 10 – June 2012

Need to utilize the new and existing scientific abilities in Southern California, in order to re-open some areas of the ocean. Without the re-opening of some areas, the fishing industry in Southern California will continue to struggle.

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