THE ECONOMIC BENEFITS OF BRISTOL BAY SALMON

PREPARED FOR:

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The Region and its People

The Bristol Bay region of Alaska encompasses 27.5 million acres of land and 12 million acres of marine ecosystem.

The region is home to more than half a dozen major river systems, with hundreds of salmon-supporting lakes, rivers, and streams that drain to a large, shallow saltwater expanse in the southeastern corner of the Bering Sea known as Bristol Bay.

There are approximately 7,000 residents in the region, including indigenous Yup'ik, Denai’na, Unangan, and Alutiiq peoples who comprise about two-thirds of the Bristol Bay population.

ALL COMBINED, BRISTOL BAY SALMON DROVE ECONOMIC BENEFITS IN 2019 IN EXCESS OF $2.2 billion

- Economic benefits initiated in Bristol Bay spread throughout Alaska, to the Pacific Northwest, and beyond. This wide-ranging system and associated dependent economic activities provide an annual recurring value to participants.
- As outlined in this report, this includes value generated in the seafood industry and through salmon-focused tourism in the Bristol Bay region.
- Salmon also provides immeasurable value as a subsistence resource, sustaining the people and cultures of the Bristol Bay region.
Subsistence salmon harvests provide a significant amount of food, while perpetuating traditional values and knowledge. In many places in Bristol Bay it would not be economically or logistically possible to replace the quality and quantity of protein subsistence salmon provides.

**Salmon hold outsized importance as a subsistence resource in the region.**

- **Half to three-quarters** of the Bristol Bay harvest, by pounds of usable food, is comprised of salmon – about twice the proportion of salmon in statewide subsistence harvests.

**The Bristol Bay subsistence salmon fishery is a statewide resource.**

- More than **750 regional residents** – representing a roughly equivalent number of households – reported subsistence harvest.
- Alaskans from outside the region harvested about **16%** of the Bristol Bay subsistence salmon catch in 2017. Reporting shows that half these residents were from Anchorage, and the remainder from 26 communities spread across the state.
- Overall, **29% of the state’s subsistence sockeye harvest** was caught in the Bristol Bay region.
Impact of Bristol Bay salmon fishery within the United States

$2.0 billion  $830 million  15,000
TOTAL OUTPUT  LABOR INCOME  TOTAL EMPLOYMENT (ANNUALIZED)

Approximately 8,500 harvesters are directly employed in the Bristol Bay fishery each year:

- 2,000 residents of the Bristol Bay region
- 2,500 Alaska residents
- 4,000 residents of other U.S. states

218 million pounds
COMMERCIAL HARVEST

$263 million
VALUE TO HARVESTERS
The peak value, in 2019, was $372 million.

Processors employed 6,000 workers in Bristol Bay in 2019 to transform the raw salmon harvested during the fishing season. Processing workers earned $49 million.

137 million pounds
PROCESSED PRODUCT

$540 million
FIRST WHOLESALE VALUE
The peak value, in 2019, was nearly $710 million.
The Economic Benefits of Bristol Bay Salmon
February 2021

SEAFood Industry
Alaska and Pacific Northwest Impacts

$990 million
TOTAL IMPACTS WITHIN ALASKA IN 2019

- Commercial fishing activity resulted in $294 million in direct labor income.
- Processing activity generated $81 million in direct labor income.

Alaska resident fishermen earned $151 million from Bristol Bay salmon in 2019, including $50 million earned by residents of Bristol Bay region communities.

Non-resident fishermen earned an additional $192 million in 2019.

The Bristol Bay salmon run also is a significant component of the overall Alaska salmon resource. The commercial harvest of 45 million salmon was one-fifth of all salmon commercially harvested in Alaska in 2019 and provided more than half the ex-vessel value from all salmon harvested in Alaska that year.

In addition to fishermen and processing workers, Bristol Bay salmon supports thousands of skilled tradespeople and jobs in support sector businesses, both regionally and more broadly throughout the state and the nation. These jobs range from air service operators to diesel mechanics to net builders to expediters.

Impact of Bristol Bay salmon fishery within Alaska

$990 million TOTAL OUTPUT
$375 million LABOR INCOME
5,370 TOTAL EMPLOYMENT (ANNUALIZED)

Impact of Bristol Bay salmon fishery within the Pacific Northwest

$800 million INDIRECT AND INDUCED IMPACTS IN THE PACIFIC NORTHWEST IN 2019

$370 million IN LABOR FROM SEAFOOD INDUSTRY
7,000 TOTAL EMPLOYMENT (ANNUALIZED)

The Pacific Northwest plays a crucial role as a gateway between the Alaska seafood industry and the rest of the world. The region boasts a wide range of port facilities, seafood processing infrastructure, and is home to many companies that manufacture and/or sell equipment to Alaska operations.

Impact of Bristol Bay salmon fishery in the balance of the nation

$210 million TOTAL OUTPUT
$85 million LABOR INCOME
1,930 TOTAL EMPLOYMENT (ANNUALIZED)
**TOURISM INDUSTRY**

Tourism in Bristol Bay generated **$155 million** in economic output in Alaska in 2019.

This included more than **2,300 seasonal jobs** in Alaska and **$67.9 million** in labor income.

Roughly **90 lodges and camps** in Bristol Bay cater to tourists, with a primary focus on sportfishing and bear viewing.

- All told, the region can accommodate approximately **1,300 overnight guests** at a time, who pay an average **daily rate of $1,125**.
- Estimated visitor spending by lodge and camp guests was **$77 million** in 2019.
- Sportfishing lodges and camps generate the majority of tourism spending in the Bristol Bay region, with **most spending generated by non-resident fishermen**. Alaska residents also travel frequently to the region to fish.

Bear viewing is also an important salmon-dependent tourist activity in the region, with the bulk of visitors making day trips from Anchorage or other communities in the Cook Inlet region.

- An estimated **20,000 people** participated in bear viewing during trips to Katmai National Park and Lake Clark National Park and Preserve in 2019.
- Total spending on these visitor trips is estimated at **$20 million**.
Bristol Bay wild salmon are an abundant, perpetual resource that are a vitally important economic engine, the foundation of indigenous cultural systems, and play a critical role in the regional ecosystem.

- The sustainable, renewing resource generated more than **$2.2 billion in value** in 2019, supporting tourism, seafood harvest and processing, and a host of support sector businesses.

- Bristol Bay salmon provide income, directly or through indirect and induced impacts, for more than **15,000 Americans**.

- Resource taken through subsistence harvest provides food and cultural sustenance for more than **700 households** in the Bristol Bay region.

- Bristol Bay salmon act as an ecological pump, **carrying rich marine nutrients** deep into regional watersheds where they feed a host of animals and biological processes.

- The nutritious seafood produced from Bristol Bay's sustainable harvest is enjoyed by consumers in dozens of countries, **distributing the benefit of this resource across the globe**.

These summary findings are drawn from a report published in February 2021, available at [www.mckinleyresearch.com](http://www.mckinleyresearch.com) or by contacting the Bristol Bay Defense Fund at [www.bristolbaydefensefund.com](http://www.bristolbaydefensefund.com).