SEAGO
SouthEast Alaska Guides Organization

ECONOMIC IMPACTS OF

GUIDED SPORT FISHING IN SOUTHEAST ALASKA 2024

JANUARY 2025

PREPARED BY

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Executive Summary

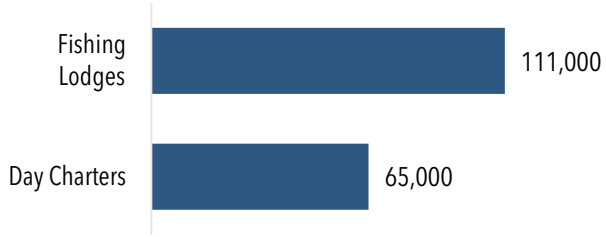
Sport fishing is one of the most popular visitor activities in Southeast Alaska, offering a range of options to anglers – from half-day charters in busy port communities to week-long remote lodge experiences. These visitors, and the dollars they spend, represent an important source of jobs and income throughout the region. Southeast Alaska Guides Organization (SEAGO) contracted with McKinley Research Group to estimate the economic impacts of Southeast Alaska's guided sport fishing industry in 2024. Following are key findings.

Sport Fishing Participation

An estimated **84,000 anglers** participated in guided sport fishing in 2024, representing **176,000 angler days**. Nearly two-thirds of angler days **(63%)** are attributable to fishing lodges, and **37%** to day charters.

An estimated **74%** of guided fishing activity was by fishermen who came to Southeast Alaska with the express purpose of sport fishing. The remainder fished for one day out of a longer trip.

Number of Angler Days by Type, 2024



Total Angler Days: 176,000
Total Anglers: 84,000

Sport Fishing Spending

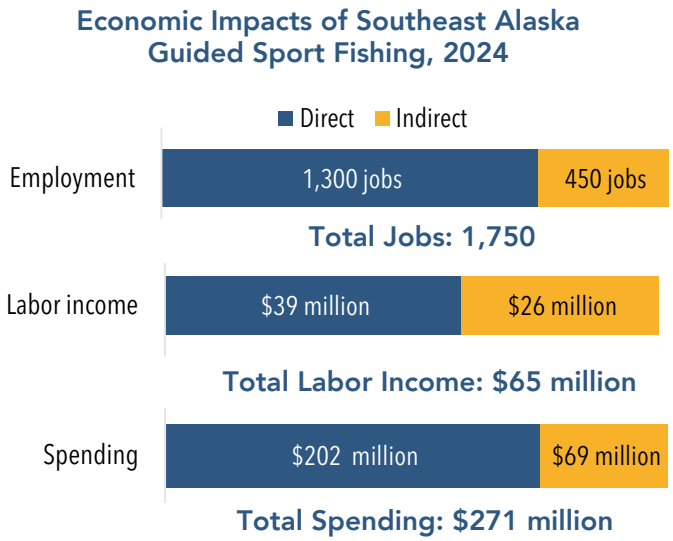
Sport fishing participants spent an estimated **$202 million** in Southeast Alaska in 2024. The vast majority of spending (**88%**) was attributable to fishing lodge guests, while **12%** was attributable to day charter fishermen. Anglers make a wide array of purchases in addition to their lodge or fishing packages: dining, gifts, rental cars, flights, and fish processing, for example.

Direct Spending by Angler Type, 2024

Total Spending: $202 million

Economic Impacts

The **$202 million** in direct spending created **1,300 jobs** and **$39 million** in labor income in 2024. These impacts have "multiplier effects" when visitor dollars re-circulate in local economies. Including direct, indirect, and induced impacts, the industry supported **1,750 jobs**, **$65 million** in labor income, and total spending of **$271 million** in 2024.



Sport Fishing Businesses

An estimated **300 businesses** provided sport fishing services in 2024. Most guiding businesses are small, with more than **90%** employing five or fewer guides.

Sport fishing businesses employed an estimated **650** guides in 2024. They also employed deckhands, fish cutters, mechanics, shuttle drivers, housekeepers, cooks, wait staff, bartenders, dishwashers, front desk agents, maintenance workers, management, bookkeepers, and marketers.

The average annual income among those working for sport fishing businesses or offering guiding services as a sole proprietor is estimated at **$30,000**, with most workers working full or more than full time during the summer season. Workers earned an estimated **$4.5 million** in tips in 2024.

About **90%** of business nonpayroll spending is in-region. Guided sport fishing businesses are important customers for businesses in Southeast Alaska including regional air carriers, barge operators, marine mechanics, sporting goods stores, fuel sellers, and food distributors.

Location, Species, Rates

Sport fishing occurs throughout Southeast, most concentrated in Ketchikan (**23%** of angler days), Prince of Wales (**22%**), Sitka (**20%**), and Gustavus/Elfin Cove/Pelican (**16%**).

Opportunities to catch halibut, king salmon, and silver salmon play the biggest role in bringing anglers to Southeast, although the region's wide variety of species is also an important draw. An estimated **93%** of guided sport fishing activity is in salt water.

Average per-angler fishing rates are estimated at **$400** for day charters, **$1,300** for in-town lodges, and **$1,600** for remote lodges. Significant pricing variation exists within categories due to included versus add-on services, such as processing, licenses, transport, meals, and other amenities.

Local and State Government Revenues

The industry is responsible for more than **$11 million** in revenue to local and state governments from business and visitor spending on taxes and fees including sales tax, bed tax, fishing licenses/stamps, marine fuel tax, and fish box tax.

Introduction and Methodology

Guided sport fishing is a critical component of Southeast Alaska's tourism industry, with tens of thousands of visitors participating on an annual basis. To better understand the importance of this sector, Southeast Alaska Guides Organization (SEAGO) contracted with McKinley Research Group to estimate the economic impacts of Southeast Alaska's guided sport fishing industry in 2024. This report provides a profile of the industry; the amount of jobs, income, and spending it generates; and associated revenues to state and municipal governments.

Methodology

Key Data Sources

Several data sources were used to quantify the guided sport fishing industry in Southeast Alaska:

- **Inventory of active Alaska sport fishing businesses, guides, and vessels (ADF&G data request)** – Data provided by the Alaska Department of Fish and Game (ADF&G) formed the basis of the report's business inventory, which was supplemented with desktop research and interviews.
- **Regional guided angler-day statistics (ADF&G data request)** – ADF&G data on total guided angler-activity was used for data validation and to describe the multi-year trend. Historical freshwater logbook data were used to estimate current guided freshwater activity.
- **Sport fishing business locations, rates, and offerings (business websites)** – Details from business websites were used to describe average package prices and validate the business inventory.
- **Previous McKinley Research Group visitor research** – The study team drew upon the firm's tourism research library in calculating cruise passenger participation rates and spending by sport fishing visitors.
- **Municipal sales and bed tax rates (Office of the State Assessor)** – The annual Alaska Taxable report compiles tax rates across jurisdictions, which were used for bed and sales tax estimates.

Interviews and Surveys

The study team conducted 38 interviews with sport fishing businesses. Additionally, 26 businesses participated in an online survey distributed by SEAGO. Interview and survey questions included detailed information about business employment, spending on goods and services, number of guests, and business revenue. Results from the interviews and surveys were

used to build angler and business spending profiles by business type. A list of participating businesses is provided in the Appendix.

Economic Impact Analysis

The study team developed several business employment and spending profiles based on data gathered from sport fishing businesses through the interview and survey process. Average spending was applied to an inventory of active sport fishing businesses by region and business type to estimate total direct sport fishing industry employment and spending in Southeast Alaska. Applying costs by business type – day charter, in-town lodge, and remote lodge – played an integral role in estimating total spending as the type of expenses incurred varies greater by business type.

IMPLAN, an industry standard input-output economic impact model, was used to analyze the indirect and induced spending supported by the industry.

Region

This study describes the guided sport fishing industry in Southeast Alaska, which includes the following boroughs/census areas:

- Haines Borough
- Hoonah-Angoon Census Area
- City and Borough of Juneau
- Petersburg Borough
- Ketchikan Gateway Borough
- Prince of Wales-Hyder Census Area
- City and Borough of Sitka
- City and Borough of Wrangell
- City and Borough of Yakutat

Angler Categories

The economic footprint of a sport fisherman who comes to Southeast Alaska for the purpose of fishing is substantially different than one who books a sport fishing shore excursion while on a cruise. For fishing-focused visitors, all visitor spending (lodging, food, gifts, transportation, etc.) can be attributed to the guided sport fishing industry. In the case of cruise ship passengers and other casual fishermen, only spending directly with the sport fishing business can be counted since other spending (such as on food, lodging, or cruise package) would have occurred in the absence of the fishing activity and is therefore not attributable to the industry.

This report categorizes guided anglers into three categories:

- **"Fishing-focused" visitors:** Visitors who travel to Southeast Alaska specifically to go sport fishing, generally for at least several days. These visitors represent an estimated 74% of total angler-days.
- **Cruise ship passengers:** Visitors traveling to, or from, Alaska via cruise ships who tend to participate in partial-day fishing trips due to limited time in port. These visitors represent an estimated 23% of total angler-days.
- **"Casual" fishermen:** Non-cruise visitors who usually spend a partial or full day fishing as part of a larger travel itinerary. These visitors represent an estimated 3% of total angler-days.

Sport Fishing Volume

In 2024, an estimated 84,000 visitors participated in guided sport fishing in Southeast Alaska, spending a combined 176,000 days fishing in the region. Over 60% of these visitors participated in sport fishing by taking a day charter, with the remaining 38% staying at a fishing lodge. Fishing lodge anglers tend to spend more days fishing than day charter anglers. In terms of angler days, 63% were attributable to fishing lodges and 37% to day charters.

Table 1. Southeast Alaska Guided Sport Fishing Activity, By Business Type, 2024

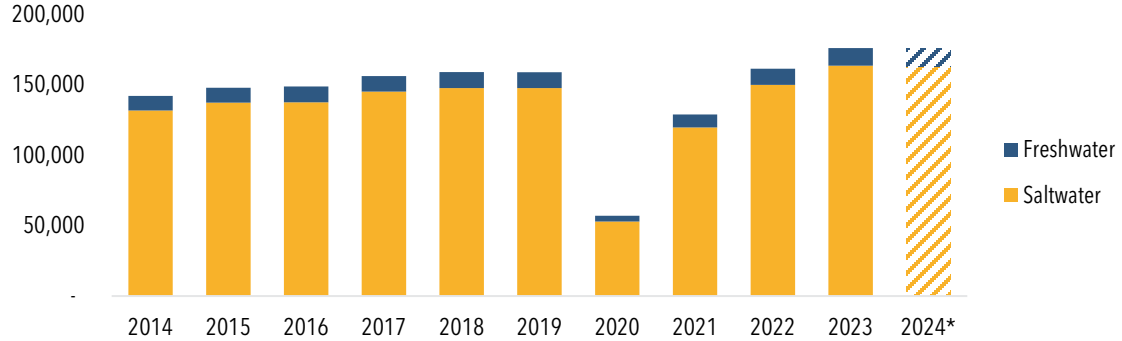
Business Type	Angler Days	% of Total	Anglers	% of Total
Day charter total	**65,000**	**37%**	**52,000**	**62%**
Day charter (non-cruise)	24,000	14%	11,000	13%
Day charter (cruise passengers)	41,000	23%	41,000	49%
Fishing lodges total	**111,000**	**63%**	**32,000**	**38%**
In-town lodges	69,000	39%	23,000	27%
Remote lodges	42,000	24%	9,000	11%
Total	**176,000**	**100%**	**84,000**	**100%**

Source: McKinley Research Group estimates, based on ADF&G business inventory

Trends

The number of angler days grew by 24% over the ten-year period of 2014-2023. Activity in 2023 and 2024 was above 2019 levels, prior to the COVID-related downturn in 2020 and 2021. Guided saltwater activity accounts for the majority of angler days in Southeast.

Figure 1. Guided Angler Activity (Angler Days) by Water Type in Southeast Alaska, 2014 to Preliminary 2024



Source: Alaska Department of Fish & Game saltwater logbook data and McKinley Research Group estimates
*Preliminary

Sport Fishing Businesses

Nearly 300 businesses provided guided sport fishing in Southeast Alaska in 2024 according to data provided by Alaska Department of Fish & Game. The two most common types of businesses are day charter businesses and fishing lodges.

Day Charter Businesses

"Day charter" businesses take clients on day or partial-day fishing trips, and do not package fishing with lodging. Compared to lodges, day charters are more densely grouped in the larger communities of Juneau, Ketchikan, and Sitka. Day charter business operators indicated in interviews that except for cruise passengers, the vast majority of their customers are "fishing-focused" visitors, who usually fish for multiple days in a row and return in successive years. Visitors who include fishing as part of a longer trip itinerary represent a small proportion of their customer base.

Fishing Lodges

"Fishing lodges" refers to a broad range of businesses that include:

- Combined hotel/sport fish guiding businesses
- Guiding businesses that contract lodging for guests
- Expedition-style businesses that provide lodging aboard motherships or in field camps
- Businesses that primarily provide fishing/lodging packages while also providing day charters.

In this report, "remote lodges" describes lodges accessed by floatplane or private boat.

Business Size

Guided sport fishing operations range in size from part-time one-boat operations to large lodges that employ dozens of guides and over 100 total employees. In general, most are small businesses. Among Southeast sport fishing businesses that reported landings in 2023, more than half were one-guide operations, and nearly 90% had five or fewer guides.

Table 2. Count of Businesses by Number of Active Guides, 2023

# of Guides	# of Businesses
1 guide	187
2 guides	35
3 guides	27
4 to 6 guides	26
7+ guides	22

Source: ADF&G saltwater logbook data, MRG estimates

Rates and Offerings

Based on published prices, average per-angler day rates in 2024 were $400 per day for day charters, $1,300 per day for in-town lodges, and $1,600 per day for remote lodges. Significant pricing variation exists within categories due to included versus add-on services. Offerings that are part of the purchase price for some businesses but not others include:

- Fish processing (or processing beyond a certain weight)
- Fishing license/king stamp
- Small plane or boat transport to business from a hub community
- Car shuttle from airport or cruise dock to business
- Guest use of vehicle during stay
- Lunch onboard charter
- Meals at lodge
- Alcohol at lodge (not included in most packages)
- Non-sportfishing activities (such as non-guided freshwater fishing, hiking, biking, kayaking, and bear viewing)

Geographic Distribution

Guided fishing activity occurs throughout the region. Ketchikan (23%), Prince of Wales (22%), and Sitka (20%) were the top three fishing areas by number of angler days in 2023, followed by Hoonah-Angoon (16%), Juneau (10%), and Yakutat (5%).

Table 3. Estimated Distribution of Angler Days by Borough/Census Area, 2023

Borough/Census Area	% of Total Angler Days
Ketchikan Gateway Borough	23%
POW-Hyder Census Area	22%
Sitka City and Borough	20%
Hoonah-Angoon Census Area	16%
Juneau City and Borough	10%
Yakutat City and Borough	5%
Petersburg Borough	1%
Haines Borough	1%
Wrangell City and Borough	1%

Target Species

Halibut and salmon (especially king salmon and coho salmon) are overwhelmingly the most advertised species. However, while many operators identified these as the top two, others reported that the greatest strength of Southeast Alaska as a sport fishing destination was the multispecies opportunities, with a chance for guests to catch salmon, halibut, rockfish, and lingcod. A smaller number of businesses advertise other species such as sablefish, Dungeness crab, shrimp, and salmon sharks.

An estimated 7% of angler days are attributable to freshwater fishing. Among freshwater guides, important target species include spawning salmon, Dolly Varden, steelhead trout, rainbow trout, and cutthroat trout.

Industry Spending and Employment

Direct economic impacts include spending by sport fishing participants and the businesses that serve them in Southeast Alaska.

Spending by Sport Fishing Participants

Direct spending attributable to sport fishing participants in Southeast Alaska totaled an estimated $202 million in 2024, including $192 million in spending directly with sport fishing businesses as well as $10 million in spending with other businesses such as hotels, restaurants, and gift shops. The vast majority of spending (88%) was attributable to fishing lodge guests, while 12% was attributable to day charter fishermen.

Table 4. Guided Sport Fishing Participant Direct Spending by Angler Type, 2024

	Spending
Fishing lodge angler spending	$177 million
Day charter angler spending	$25 million
Total direct spending	**$202 million**

Source: McKinley Research Group calculations

Spending with Sport Fishing Businesses

Sport fishing participating spent a total of $192 million spent with sport fishing businesses in 2024, including the packaged price of the charter or lodge stay, and various supplemental expenses as described below.

GRATUITIES

Tips are an important source of wages for guides as well as remote lodge staff such as servers and housekeepers. According to business interviews, tipping varies widely depending on the individual, ranging from zero to $100 per day. Participants paid a total $4.5 million in gratuities in 2024.

ADD-ONS

Spending that is often additional to package or day charter rates include fish processing (or additional processing above a cap), alcohol purchase, and lodge gift store purchases.

TAXES AND FEES

Sport fishing business are required to pay a number of taxes and fees based on their location. Some guiding businesses include taxes and fees in rates while others pass these on to clients at

cost. Taxes and fees include sales and bed taxes, credit card swipe fees, and the cost of fishing licenses/stamps. Some businesses add a fuel surcharge when prices are high.

Spending with Other Businesses

Fishing-focused visitors make a variety of purchases outside of their charter boat or lodge that are attributable to the industry, estimated to total $10 million in 2024.

- **Non-Cruise Day Charter Fishermen:** Anglers fishing with a day charter businesses often pay for lodging, ground transportation, meals, shopping, and fish processing (when not provided by the charter) from other regional businesses.
- **In-Town Lodge Guests:** Guests staying at in-town lodges often make additional purchases of airfare (within the region) and meals not included in their package price.
- **Remote Lodge Guests:** Many remote lodge guests schedule an overnight in Ketchikan, Sitka, or Juneau before or after their fishing trip, spending money on lodging, food, and gifts.

Spending by Sport Fishing Businesses

Spending by guided sport fishing participants is used by charters and lodges to pay for business expenses.

Employment and Payroll

Labor makes up the largest share of operating expenses among guided sport fishing businesses in Southeast, especially for lodges. An estimated 1,300 people were directly employed by the industry in 2024, earning an average of $30,000 per person. Total labor income is estimated at $39 million, which includes payroll (wages and benefits) as well as owner's profit after expenses.

Table 5. Employment and Labor Income of Guided Sport Fishing Businesses in Southeast Alaska, 2024

	Direct Impact
Employment	1,300
Average wages	$30,000
Total labor income	$39 million

Source: Industry interviews and McKinley Research Group estimates

Types of jobs include guides (about half the workers), deckhands, fish cutters, mechanics, shuttle drivers, housekeepers, cooks, wait staff, bartenders, dishwashers, front desk agents, maintenance workers, management, bookkeepers, and marketers. Most of the work is seasonal and full-time with some overtime during the peak of the season. The off-season workforce is a much smaller crew of owners, managers, booking agents, and maintenance workers.

Businesses reported that about 30% of workers were Southeast Alaska residents. The local worker percentage was generally higher among smaller operations.

Non-Payroll Expenses

Besides payroll, businesses identified boat maintenance, fuel, and food (for lodges) as major expenses. Other expenses include:

- Advertising
- Air taxi tickets (for remote lodges)
- Bait and tackle
- Boat moorage/storage
- Building maintenance
- Credit card fees
- Debt service
- Freight (for remote lodges)
- Halibut quota
- Insurance
- Taxes
- Utilities

SPENDING IN SOUTHEAST ALASKA

According to interviews with sport fishing guides and lodges, more than 90% of 2024 non-payroll business spending occurred in Southeast Alaska. Guides and lodges pay for most boat maintenance in-region, while also buying fuel locally and paying dockage/moorage fees for space at municipally owned harbors across the region. Many sport fishing businesses contacted for this analysis noted working with local banks or credit unions, such as Tongass Federal Credit Union, to fund important purchases.

Fishing lodges incur a higher level of business expenses, and spend more in-region, to operate their facilities while providing guide services. Based on their location, lodges may be connected to local utilities or spend money locally on fuel to generate power on-site. Most fishing lodge food comes from in-region distributors, and most fishing equipment is purchased through Southeast Alaska vendors. Many lodges or individual guides purchase food or equipment in regional hubs, and transport goods to their community using services such as Alaska Marine Lines. Additionally, remote lodges rely on local air taxi services such as Island Air Express and Alaska Seaplanes to transport guests.

The only key spending categories *not* usually spent in-region were insurance, advertising, and credit card swipe fees.

Economic Impacts

Guided sport fishing participants bring new dollars to the Southeast Alaska economy when they purchase a fishing package, pay for a day charter, and spend money with other businesses during their stay. As these dollars circulate in-region, additional employment and labor income are created.

- **Direct impacts** include visitor spending on guided sportfishing and other travel expenses, and charter business and lodge employment and labor income.
- **Indirect impacts** are jobs and labor income supported by spending on goods and services by guided sportfishing businesses.
- **Induced impacts** are generated as employees both in the industry and of vendors providing goods and services *to* the industry spend their payroll dollars in local economies.

As described in the previous chapter, direct impacts of the industry included1,300 direct jobs, $39 million in direct labor income, and $202 million in direct spending. This spending generated an additional 450 jobs, $26 million in labor income, and $69 million in spending as businesses purchased goods and services locally and employees spent their wages. In total, the industry generated 1,750 jobs, $65 million in labor income, and $271 million in spending.

Table 6. Impacts of Guided Sportfishing Related Spending, Southeast Alaska, 2024

	Employment	Labor Income	Spending
Direct	1,300 jobs	$39 million	$202 million
Indirect + Induced	450 jobs	$26 million	$69 million
Total Impacts	**1,750 jobs**	**$65 million**	**$271 million**

Source: McKinley Research Group calculations

Payments to Local/State Government

Guided sport fishing businesses and their customers paid more than $11 million in taxes and license fees to local and state governments in 2024. (This spending is included in the overall impacts described in the previous chapter.)

Table 7. Estimated Industry Spending on Select Taxes, Licenses, and Fees, 2024

Tax/Fee Type	Amount
Sales taxes	$7,100,000
Fishing licenses/stamps	$2,900,000
Bed taxes	$1,100,000
Marine fuel taxes	$100,000
Fish box taxes	<$100,000
Total taxes/fees	**$11,200,000**

Sales tax represents the largest share of this total government revenue, estimated at $7.1 million followed by fishing licenses/stamps ($2.9 million) and bed taxes ($1.1 million). Marine fuel taxes and fish box taxes each represented $100,000 or less.

Sales and bed taxes: Most guided sport fishing businesses are located in jurisdictions that levy sales and bed taxes. Sales tax rates range from 2.5% to 7% in Southeast Alaska, while bed taxes rates range from 4% to 9%. Tax rates are provided in the Appendix.

Licenses and stamps: The State of Alaska charges for sport fishing licenses (1-day, 3-day, and 7-day), as well as king salmon stamps. Guiding businesses generally pay these fees on behalf of their clients.

Marine fuel tax: The State of Alaska charges 5 cents per gallon for marine fuel.

Fish box tax: Sitka and Gustavus charge a "fish box tax," $10 on each box of fish caught by a charter customer for transport home.

While difficult to quantify, sport fishing guides and lodges in Southeast Alaska also pay property taxes, state and federal corporate income taxes, business licensing fees, and vessel documentation fees which generate additional revenue for local, state, and federal governments.

Appendix

Contact List

SEAGO and McKinley Research Group would like to thank the following businesses for contributing to the study.

- Action Adventure Charters
- Alaska Charter Service
- Alaska Sportfishing Expeditions
- Alaska Wide Open Charters
- Alaskan Ohana Sportfishing
- All In Charters
- Anderson Lodge Alaska
- Angling Unlimited, Inc
- Apex Lodge And Charters
- A-Z Sportfishing Charters
- Cascade Creek Lodge
- Catch-A-King Charters
- Chinook Shores
- Chrome Chasers
- Dove Island Lodge
- Eagle Charters
- Ear Mountain Charters
- El Capitan Lodge
- Explore Alaska Charters
- Fireweed Lodge
- First City Charters
- Fishing Bear Charters
- Glacier Bear Lodge
- Go Fish Ketchikan Fishing Charters
- Icy Bay Lodge
- Indigenous Adventure Charters
- Ketchikan Fishing Expeditions
- Ketchikan's Finest Fishing Charters
- Kingfisher Charters & Lodge
- Magic Man Charters
- Natventure Tours
- Never Monday Charters
- Petersburg Sportfishing
- Pybus Point Lodge
- Rippin' Lip Alaska Sport Charters
- Salmon Falls Resort
- Screamin' Reels Guide Service
- Sea Otter Sound Lodge
- Shelter Cove Lodge
- Shelter Lodge
- Sitka Sea Level Adventures
- The Alaska Catch
- The Blue Heron Inn
- Treasure Hunter Lodge
- True North Sportfishing
- Waterfall Resort
- Wild Strawberry Lodge
- Yakutat Bay Adventures

Tax Rates

Table 8. Sales and Bed Tax Rates in Southeast Alaska, 2024

Borough	Sales Tax Rate (Summer)	Bed Tax Rate
Angoon	3%	5%
Craig	5%	$5/day
Gustavus	3%	4%
Haines Borough	5.5%	4%
Hoonah	6.5%	0
Juneau	5%	9%
City of Ketchikan	4%	7%
Ketchikan Gateway Borough	2.5%	4%
Klawock	6.5%	6%
Pelican	4%	$14/night
Petersburg Borough	6%	4%
Sitka	6%	6%
Skagway	5%	8%
Thorne Bay	6%	4%
Wrangell	7%	6%
Yakutat	5%	8%

Source: Office of the State Assessor Alaska Taxable Report

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