

The Economic Contributions of Anglers to the Los Cabos Economy

Produced on behalf of



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Executive Summary

In recent years, the Los Cabos region of Baja California Sur has experienced rapid growth as a major North American tourist destination. From its roots as a small, quiet fisheries-based town, its world-class striped marlin fishery has helped foster rapid growth. Now, the Los Cabos region is a major provider of jobs and new dollars to the Mexican economy. Information is needed to understand and communicate the importance of Los Cabos fisheries to local, state and national leaders.

In 2007 and 2008, a comprehensive study was conducted to estimate the dollars, jobs and tax revenues created by anglers in the Los Cabos region. A series of surveys were conducted of visitors, both anglers and non-anglers, to gain an understanding of the number of people who fish in Los Cabos and the dollars spent. Additional surveys were conducted of various business sectors to develop the information needed to construct a model of the region's sportfishing economy. Dozens of interviews were conducted with business, sportfishing, political and tourism leaders to learn about the nuances of the regional economy and how it provides for visitors.

In 2007, an estimated 354,013 people, most all of them international visitors, fished in Los Cabos. While in Los Cabos, they spent an estimated \$1,785 each for lodging, charter boats, food, transportation, tackle, fuel, and much more. These expenditures then started a series of economic effects rippling through the local economy, creating:

- US \$633.6 million in retail sales, representing new dollars brought into Los Cabos by anglers,
- 24,426 jobs,
- US\$ 245.5 million in local and federal tax revenues, and
- US\$ 1.125 billion in total economic activity.

The best way to couch these impacts is to consider that, if everybody who fished in Los Cabos did not visit in 2007, the regional economy would have been \$1.125 billion smaller, with 24,426 fewer jobs, and government coffers would have been poorer by \$245.5 million. Visitors who fish in Los Cabos are estimated to provide 24.1% of the total dollars injected into the Los Cabos economy by tourism, including cruise ship visitors. A job is supported for every \$18,156 in retail sales. Every dollar spent by anglers generated \$1.78 in economic activity in the Los Cabos region. Every visiting angler generates \$721.99 in local and federal tax revenues.

Dollars spent in Los Cabos make their way to other parts of the national economy, benefiting businesses and individuals in all parts of Mexico. It is estimated that the US \$633.6 million spent by Los Cabos anglers in 2007 added \$7.042 billion pesos (or \$US 652 million) to Mexico's Gross Domestic Product (different than output),¹ 34,895 jobs total throughout the country and an additional \$815.706 million pesos (US\$ 75.53 million) in federal tax revenues nationwide.

Sportfishing is a major contributor to the economic health of Los Cabos and the national economy. Anglers have choices. Only 25% of U.S. anglers who fished outside the U.S. fished in

¹ "Output" measures the total expenditures made to bring a product to market. GDP is the final value of goods and services sold in an economy. Output essentially double-counts the value of products sold and results in a larger dollar figure than GDP. While both measures are valid, they serve a different purpose. See the Definitions section for more explanation.

Mexico. Equal numbers of U.S. anglers report they would prefer fishing in Costa Rica, and greater numbers report a preference for South Florida or the Bahamas.

Eighty-eight percent of international anglers who have fished in Cabo said they would be less likely to return if they know commercial harvest of billfish increased, and 85% said they would be more likely to return if commercial harvest of billfish was restricted or stopped completely. While nearly 83% of the anglers who targeted marlin on their trip to Los Cabos were successful in catching at least one of the marlin species available, only 62% of the angling visitors said that they would choose to return to Los Cabos for another fishing trip. We believe this reflects the high demand placed on quality of fishing experiences and the highly competitive nature of the international sportfishing tourism market. Currently, anglers are reporting a slightly lower rate of satisfaction with their visits to Los Cabos compared to general hotel and timeshare guests.

If Mexico desires to maintain or maximize the wealth provided by sportfishing tourism, intelligent decisions regarding conservation-based fisheries management will be necessary. Communicating these policies and the quality of the region's fisheries to U.S. anglers is critical to continued or increased sportfishing tourism activity. This report provides some of the information needed to make such informed decisions in developing fisheries policy for Mexico's future.

1

Introduction

Over the past 20 years, the Los Cabos area of Baja California Sur, Mexico has undergone a major economic boom centered around tourism. Most in the local business community attribute this growth to Los Cabos' world-class striped marlin fishery. Hotel owners and local businesses reported that Los Cabos' reputation as a world-class striped marlin destination grew among anglers. As more anglers visited the rustic and isolated region, many brought friends and family to enjoy the weather and location. Larger hotels and greater services followed. Now, Los Cabos is a major North American tourist destination for people seeking sun, beach, and still for many—sportfishing.

Sportfishing remains a critical part of the local economy. Many within the Los Cabos community consider sustainable fisheries to be a critical component of the region's economic health. Many in the business community fear that reductions in the quality of sportfishing could lead to an economic downturn. However, the relationship between sportfishing and jobs, tax revenues, and other economic contributions has been poorly understood. Fisheries and community management decisions are often made without an understanding of the potential economic risks or benefits. To help fill this information gap, the Los Cabos sportfishing and business community and The Billfish Foundation conducted this study.

To assist management efforts associated with fisheries and economic development, this project provides two major types of information:

1. Economic impacts—the jobs, tax revenues, retail sales, and other benefits created by visiting anglers and their expenditures.
2. Marketing information—anglers' and non-anglers' motivations for visiting Los Cabos rather than other destinations, their opinions about their visits, and the factors that will bring them back or encourage them to look elsewhere for their next trip.

All economic impact results are presented in this report. The economic information was produced using existing data sources combined with a series of business and visitor surveys. Unlike the United States, comprehensive preexisting economic models do not exist for the Los Cabos region or any other region of Mexico. To help understand the level of economic activity, jobs, and tax revenues generated by anglers' expenditures, an ad hoc economic model was developed based on a series of business surveys conducted as part of this project. The result is an inside look at how the Los Cabos economy functions and the contributions of sportfishing.

Los Cabos is known for its sportfishing. It is expected that, for visitors who did not arrive for the primary purpose of fishing, an unknown portion would have visited elsewhere if the fishing was perceived to be poor. Extensive work beyond the reach of this project would be needed to determine the exact percentage. Therefore, the results of this report present the expenditures made by people who fish in Los Cabos, and not the impacts that would result if fishing were to cease.

SCOPE

This project measures and reports the economic impacts of nonresident anglers to the Los Cabos region of Baja California Sur (BCS), Mexico. When possible, the impacts to Mexico's national economy are also reported. Economic significance is defined as the total economic activity resulting from expenditures made by nonresident anglers. Economic "impacts" are the effects from nonresident anglers whose expenditures within Mexico represent new dollars to the economy.

KEY DEFINITIONS

Terms used frequently in this report include:

BCS: Baja California Sur (BCS) is the state comprising the lower half of the Baja California peninsula. Major towns and areas include La Paz (which is outside of this study region), Todos Santos, East Cape, San Jose del Cabo, and Cabo San Lucas. The last three towns together form the "sportfishing triangle," which is the focus of this study. This triangle is referred to in this report as "Los Cabos."

Economic impact: The jobs, tax revenues, total multiplier effect, and income (wages, profits, rents) generated as a result of sportfishing. Total economic impact is comprised of three parts:

1. Direct impacts: Direct impacts include the economic benefits earned by those who directly serve anglers. These would include fishing charters, hotels, restaurants, taxis, and other service providers who receive money directly from anglers.
2. Indirect impacts: The benefits earned by businesses who support companies that are directly benefited by anglers. Examples would be food wholesalers who support restaurants, landscaping companies who support hotels, gasoline suppliers to charter boats and taxis, etc.
3. Induced impacts: The economic impacts generated by employees who spend their wages and salaries. For example, an employee of a hotel or landscape company shops in local stores or visits a traveling circus. Through this mechanism, nearly every person and business in the Los Cabos region benefits from the dollars and other currencies imported by visiting anglers.

Exchange rate: U.S. dollars and Mexican pesos were standardized based on the June 2007 exchange rate as reported by the Federal Reserve Bank of New York. In June, 2007, the exchange rate was 10.8 pesos for one U.S. dollar.

Gross domestic product: The total value of goods and services generated by the economy. GDP is the value of goods and services produced domestically, whether by domestic or foreign-owned firms. GDP is not to be confused with gross national product (GNP), which measures the value of goods and services produced by all domestic

firms, whether production takes place domestically or overseas. See the definition of “output” for more detail.

Los Cabos: The towns of East Cape, San Jose del Cabo, and Cabo San Lucas together form the “sportfishing triangle” of Los Cabos. This area is the focus of this study.

Output: Also known as the “ripple effect” or the total multiplier effect, output is the sum of rounds of economic activity that results from anglers’ original retail expenditures. For example, hotels spend their angler dollars on linen companies, who pay some of their receipts to employees and cotton suppliers, who then spend part of their receipts on raw cotton and machinery, and so on. The rounds of spending are counted until the effects of angler dollars can no longer be measured. When compared to GDP, output “double-counts” the value of many products as they change hands before reaching the final consumer. Therefore, output measures total economic activity, which is a larger figure than GDP. GDP basically reports the value of all final products consumed within the economy.

Retail sales: Retail sales result any time a visiting anglers spends money for any purpose within the BCS economy.

Ripple effect: See “Output.”

Total multiplier effect: See “Output.”

2

METHODS

SYNOPSIS OF THE APPROACH USED

The key data required to operate the economic model are estimates of angler expenditures. Angler expenditures were estimated using a combination of angler and general Los Cabos visitor surveys combined with existing reports and information sources.

The five major components for this project were:

1. In-person interviews with sportfishing and tourism-related businesses in the Los Cabos area to identify existing data sources and information needed by the local business community, and to secure their participation in the various surveys.
2. Surveys of local businesses were conducted to provide the information needed to develop an economic model. These surveys helped develop an understanding of how and when businesses receive and re-spend angler dollars, and when angler dollars leave the local economy.
3. Visitor surveys were conducted to collect expenditure and opinion (marketing) data from anglers and non-angler visitors who have or could potentially visit BCS.
4. Visitor and angler expenditure estimates were generated based on the survey results and existing data sources regarding the number of annual visitors to Los Cabos and the percentage who fish while in Los Cabos.
5. An ad hoc economic model of the Los Cabos economy was developed as part of this project. Economic models are statistical equations that explain the level of jobs, tax revenues, and other benefits resulting from each dollar spent by anglers. The model developed for this project is based on a series of surveys of Los Cabos businesses and existing data sources. The model was developed in partnership with FIRMUS, a Mexico City-based consulting firm.

In the following sections, each of these five components is discussed in detail.

EXISTING DATA

A substantial effort was made to identify existing data before investing resources into producing new data. A series of interviews were held in the Los Cabos region and in Mexico City with state and federal government representatives, business associations, private companies, sportfishing representatives, conservation organizations, and elected officials. The purpose of these interviews was to clarify the issues related to fisheries, fisheries conservation, and regional economic development, as well as to inquire about available studies and data of possible use to this project. The latter included inquiring about lists of visitor e-mail addresses and contact information for use in surveys, annual

visitor estimates, and if all parties would be willing to participate in business and customer surveys. At these interviews, each company was provided with a signed and notarized confidentiality agreement providing assurances of data security and how the data would and would not be used. Information eventually obtained included passenger arrival data to the Los Cabos airport, information on the economic size and trends regarding the timeshare business, cruise ship passenger arrival counts, marina information, and more. All published sources are listed in the Bibliography and, when appropriate, are described in this report. Most interviews were held in the project's initial stages. Most interviews with hotel managers and a few other business representatives were held as the project progressed.

BUSINESS SURVEYS

Seven surveys were conducted as part of this project. Three of these focused on Los Cabos business sectors. The business survey results were used to provide the information needed to develop the Los Cabos economic model, to assist in quantifying the dollars injected into the Los Cabos region by anglers, and to understand how expenditures move from anglers' pockets to the various businesses and governments within the Los Cabos regional economy. To maximize response rates, the surveys did not inquire about exact business revenues. Initial input from regional business leaders revealed that direct questions about a business's revenues would likely reduce cooperation and survey completion. Therefore, the questions focused on "percentage" terms, such as "What percentage of your revenues come from anglers?" This point was stressed in all pre-survey announcements and in-person interviews. Businesses were assured, backed by signed and notarized confidentiality agreements, that their individual responses would remain confidential and protected. Only aggregated, averaged results would be released.

Organizations and leaders were identified for three business sectors in Los Cabos:

1. The general Los Cabos business community, led by their association CANACINTRA;
2. Hotel management, led by the Los Cabos Convention and Visitors Bureau; and
3. The Los Cabos charter boat fleet.

Initial discussions and interviews with these organizations provided a review of what the study would and could not do and secured their assistance in helping to contact their members and disseminate surveys. Organizations representing other sectors of the business community were identified, but either did not respond to requests or were not regarded as significant in regards to this project's scope to merit time and resources. The three business surveys are described below:

General Business Survey

In cooperation with the local chapter of CANACINTRA, the national business association, surveys were conducted of area businesses. The goals of this survey were to:

1. Identify when dollars left the Los Cabos area's economy;
2. For those dollars remaining, identify which sectors of the economy received and re-spent these dollars; and
3. Estimate the percentage of business expenditures that go to payroll or are taken home as business profits and dividends.

The results were used in building the economic model described later in this report. The general business surveys were conducted by CANACINTRA via in-person interviews with business managers and owners. In lieu of pretesting, a draft of the survey questions was reviewed and critiqued in person with volunteer CANACINTRA representatives who were also business owners.

Surveyors were hired and managed by CANACINTRA. All businesses approach and surveyed were selected by CANACINTRA. The Billfish Foundation provided funding to cover surveying costs. CANACINTRA reports that local businesses were selected to represent the range of businesses common to the Los Cabos area, including restaurants, wholesalers, retailers, various hospitality and construction supply businesses, and more.

The level of randomness in the selection process is not known, and the results are trusted to adequately represent the Los Cabos business community. The interviews were conducted and recorded in Spanish. Questions were designed to be matched with other surveys and existing trade data from various sources to help construct the economic models. During the development of the surveys, content was reviewed with CANACINTRA representatives to ensure that the questions asked could be answered, to help CANACINTRA explain the intent of each question to the surveyors, and to identify how to word questions to maximize response rates.¹ The survey instrument is presented in Appendix A, “Survey of the Los Cabos Business Community.” (It is presented here in English with the intro with which surveyors were provided to explain to businesses the purpose of the survey. The actual survey form used was delivered in Spanish.) Eighty surveys were targeted, and 58 were received. Due to the agreements with CANACINTRA, the results are not being shared publicly and will remain confidential with CANACINTRA, except for the aggregated results used in the final economic model. The aggregated results used in the economic model are presented in Appendix H, “Economic Model Development Report by FIRMUS Consulting.”

Hotel Management Survey

The survey instrument was designed based on the project’s information needs, as well as hotel information needs communicated by the staff of the Los Cabos CVB. Draft questions were reviewed with CVB staff prior to launching the surveys and interviews. With the support of the CVB, hotel managers were contacted four times via a series of e-mail announcements and personal requests. The CVB sent two rounds of e-mails announcing the project to area hotels and resorts, followed by two rounds of e-mails from Southwick Associates. Responding hotels were then followed up in person by Southwick Associates via scheduled in-person interviews with each hotel’s general manager. Eleven hotel and resort owners, representing approximately 16 resorts and lodging properties, were interviewed during the second week of November, 2007. An additional survey of a business owning several major properties was received in March, 2008.

In each interview, the purpose and needs of the project were explained. The specific needs were:

1. Conduct the hotel management survey regarding their business patterns; and

¹ The authors were sensitive to the fact that many local businesses may be hesitant to share information with foreign researchers about profitability and business operations for fear of inviting new competition. Therefore, some questions normally considered a part of input-output model development were excluded, such as questions that would tie revenues and expenditures back to specific business sectors such as wholesale, food and beverage, construction materials, etc. How these data gaps were overcome is explained in the economic model section of this report.

2. Assistance in distributing surveys to hotel guests. The guest survey is discussed later in Appendix F, “Survey of Hotel and Timeshare Guests.”

Each hotel manager was presented with a signed and notarized confidentiality agreement and a letter of endorsement from the chairman of the Los Cabos Convention and Visitors Bureau. Of the 11 hotel managers, 10 agreed to be interviewed regarding hotel operations.² The hotel management survey inquired about the hotel’s business operations, including staffing changes related to changes in guest-related cash flows, sources of supplies and other purchases, ownership, and more.

Based on the CVB’s report of total hotel/timeshare properties, the data obtained by the hotel management survey represents 33% of all rooms available in Los Cabos. However, not all resorts and hotels are the same. Ratings for each hotel and resort property were reported by each property and not by a third-party reviewer. On-site visits as part of this project indicate that the ratings are rather subjective, and that a four-star hotel in this project’s data may not be equivalent to a four-star rating awarded by an independent travel service. To help understand the types of hotels that participated, it was determined that all hotels rated as five-star, “Gran Turismo,” or AAA three diamonds would be classified as the highest-rated properties. All others, including one to four stars and “Especials,” would be grouped separately. Using this grouping, it was possible to report the levels of resorts and hotels that participated in this project:

	<u>5-Star Equivalent</u>	<u>All Others</u>
Percentage of Los Cabos Rooms:	69.6%	30.4%
Percentage of Participating Properties:	80.4%	19.6%

Based on the above, hotel input into this project was skewed by approximately 10% toward the higher rated hotels. Not knowing how much different the expenses and operations may vary between the two groups, the exact impact on the results cannot be determined. The lower rated group is less likely to offer as many amenities such as entertainment, and charge lower rates accordingly. Based on personal inspections, the lower rated groups appear more likely to buy a higher percentage of food, beverage and supplies locally. This project cannot presently quantify if these differences affect the economic multipliers.

The full survey is presented in Appendix B, “Survey of Los Cabos Hotel Managers.” Due to the agreements with the hotel managers, the results are not being shared publicly, but only with hotel operators who agreed to cooperate. The aggregated results used in the economic model are presented in Appendix H, “Economic Model Development Report by FIRMUS Consulting.”

Charter Fleet Survey

The largest single sportfishing-specific expense in Cabo was expected to be charter boat fees. Nearly all fishing activity in Los Cabos takes place offshore, thus boats are required. Due to Los Cabos’s remote location, most anglers do not or cannot bring their own boats with them, the exception being a few large boats able to make the long run from Southern California. Charter boats are the access points to the area’s world-famous fishing grounds. Charter operations are labor-intensive and

² One hotel manager, while agreeing to be interviewed, would not provide answers to the specific questions. This person did help explain how the hotel acquired supplies, and staffing issues and market trends, which helped provide context for the overall project. But, because this manager did not reply to the survey interview questions, this operation cannot be counted as a completed survey.

serve as one of the key channels for transferring U.S. dollars to local residents. Representatives of the charter boat fleet were cooperative and ready to assist with this project. To help understand how angler dollars are distributed through the local economy, a separate survey of charter boat businesses was conducted.

The survey was designed to provide information for use in development of the economic models discussed later. A draft was reviewed with several charter boat owners to identify improvements prior to finalizing the survey. In cooperation with area charter boat associations, the surveys were distributed to owners at meetings and in person. Surveys were distributed in Spanish. The exact number of charter boats, owners, and fleets could not be ascertained. Unlike in the U.S., lists of licensed boats were not available. Surveys were distributed to an unknown number of charter boat associations and owners. The survey inquired about staffing levels and included questions related to changes in revenues, sources of supplies, and more. In all, 11 charter boat companies returned their surveys. Discussions with sportfishing union representatives who assisted in distributing the survey indicate that about 60% of the fleet located in the Marina Cabo San Lucas³ is represented in the survey results, including most of the major operators. Due to agreements with the fleet representatives, the results are not being shared publicly and will remain confidential, except for the aggregated results used in the final economic model. The survey instrument is presented in Appendix C, “Survey of Charter Fleet Owners,” in English. The aggregated results used in the economic model are presented in Appendix H, “Economic Model Development Report by FIRMUS Consulting.”

ANGLER AND VISITOR SURVEYS

Four surveys were conducted of anglers and visitors to Los Cabos:

1. U.S. anglers who visited Cabo;
2. Hotel and resort guests (not just anglers);
3. U.S. anglers in general, whether or not they visited Los Cabos; and
4. Owners of private boats in Marina Cabo San Lucas.

These surveys were designed to:

1. Quantify the typical expenditures made in Los Cabos per angler and visitor. This includes estimates for specific items such as travel, lodging, tackle, boats, vehicles, meals, souvenirs, and more.
2. Better understand the reasons and factors that attract or dissuade anglers and other visitors from visiting Los Cabos. This information was produced as a benefit for businesses that assisted in collecting angler and visitor data. The information collected focused on:
 - A. What attracted visitors and anglers to Los Cabos;

³ The Marina Cabo San Lucas was the only marina in operation at the time of this report’s production. A second marina was under construction. Most of Los Cabos’ charter boats operate from Marina Cabo San Lucas, with a few boats—mostly resort-owned—operating from the East Cape area of Los Cabos. East Cape charter boats were not represented in this study. With no marina present, East Cape boats are anchored off the beach, thus eliminating the need for slip fees. The lack of slip fees is likely offset by the higher costs to access and maintain the anchored boats. Otherwise, the costs of operating charter boats in the East Cape area are expected to be similar to charter boat costs in Cabo San Lucas.

- B. Which factors encourage anglers and other visitors to return or not to return; and
- C. How visitors typically acquire information about Los Cabos.

Survey Methods

Angler and visitor surveys were conducted online. E-mail addresses of Los Cabos anglers and visitors were obtained from resorts, charter businesses, and fishing tournament organizers. In most cases, to protect the security of their customer lists, participating businesses preferred to send e-mails directly to their guests explaining the purpose of the survey and inviting them to click an embedded link connecting to the online surveys. In other cases, businesses provided Southwick Associates with lists of customers, who were then sent identical e-mails. To prevent abuse, each e-mail was embedded with a unique link that allowed the recipient to take the survey only once. In the case of one hotel, operators asked their guests to take the online survey while their check-out paperwork was being prepared. For convenience, a computer terminal was provided on the check-out counter linked directly to the survey Web site. Specific details about each survey are presented later in this report.

Though survey respondents were restricted from taking the survey more than once, during the data analysis stages, the responses were carefully reviewed to identify possible multiple responses. Scans for multiple responses were based on an analysis of the time of the person's visit, timing of when surveys were received, activities participated in, and similar data variables. Only two possible multiple responses were identified and eliminated. Multiple responses were naturally discouraged by the length of the survey questionnaires, the lack of offered incentives, and the qualitative nature of the questions, which did not ask about specific issues or activities to be influenced by the survey results. Descriptions of the four angler and visitor surveys follow.

Los Cabos Angler Survey

The purpose of this survey was to quantify the average amount spent in Mexico per Los Cabos angler, the opinions and motivations of Los Cabos anglers, and to profile the typical Los Cabos angler. This survey was developed based on the project's economic modeling needs and input from the project's early interviews with Los Cabos representatives regarding the issues facing sportfishing and tourism. The survey instrument is presented in Appendix D, "Online Survey of Anglers Who Fished in Los Cabos, and Results," along with the results to each question.

The survey was administered online. The survey was pretested by administering the survey to a group of anglers (N = 5) who previously had fished outside the U.S. The feedback was gained and modifications made, including better explanations of expenses made in the U.S. before departure, and modifications to the list of species pursued, as well as other countries fished.

For the primary survey, anglers' e-mail addresses were obtained from multiple sources, including hotels catering to anglers, customers of several charter operations who distributed our surveys to their confidential customer e-mail lists, a local retailer who asked anglers to provide e-mail addresses and take the survey, as well as several tournament organizers, who provided their customer contacts. With some businesses distributing the survey invitation to their customers, it was not possible to identify the number of surveys successfully received by anglers. Overall, 634 anglers responded to the survey.

Note that the results of the angler survey were not used to estimate the total number of anglers visiting Los Cabos. Instead, the results were used to determine the typical amount of money spent per angler in Los Cabos. It is still important to understand possible sources of bias to the results, even though it is not possible to identify who did not respond. For this survey, bias issues were addressed by using qualifier questions to identify when certain questions should be presented or skipped, and asking the respondents' age, sex, and income levels. These variables from both the hotel/timeshare guest surveys and angler surveys were compared to see if the profiles of responding anglers matched those of resort and hotel guests who fished. Table 1 compared the ages of hotel guests who indicated they fished to the ages of the angler survey respondents. Table 2 compares the income levels of the two groups.

Table 1. Age Comparisons for Respondents to the Hotel/Timeshare and Angler Surveys

Age			
	Hotel Guests Who Fished	Respondents to Angler Surveys	Statistically Different Between the Two Surveys?
Under 18	0.2%	6.8%	No
18–29	1.2%	1.2%	No
30–39	9.7%	10.4%	No
40–49	27.4%	23.7%	Yes
50–59	37.1%	32.9%	Yes
60–69	20.6%	20.9%	No
70–79	3.7%	2.8%	No
80+	0.0%	1.2%	No

Table 2. Income Comparisons for Respondents to the Hotel/Timeshare and Angler Surveys

Income			
	Hotel Guests Who Fished	Respondents to Angler Surveys	Statistically Different Between the Two Surveys?
under \$20K	0.3%	0.0%	No
20K–\$40K	1.4%	1.4%	No
40K–\$50K	1.1%	3.4%	No
50K–\$75K	7.5%	5.8%	No
75K–\$100K	17.1%	14.2%	No
100K–\$150K	29.3%	26.1%	No
150K–\$250K	25.7%	20.7%	No
over \$250K	17.7%	28.4%	No

A test was conducted to determine if the proportions of the two angler groups were statistically significant.⁴ The results, presented in the last columns of Tables 1 and 2, help determine if the two surveys were different, or if one was possibly skewed compared to the other. The results show that, overall, there was very little difference between the two surveys, with statistical differences measured only between two of the age cohorts and none in any of the income cohorts. Without the ability to determine which survey is closer to correct, adjustments to any of the results were not practical. Also, with income expected to be a greater determinant of expenditures than age, and considering the differences in the two age cohorts between the two surveys, adjustments were not deemed necessary.

Many travel expenditures are spent at the group versus individual level. Examples would include a family’s restaurant or hotel bill, and fuel for transportation. Economic research by the U.S. Forest Service (Stynes and White, 2006) showed that people often will report group expenditures when asked for their individual shares. Therefore, questions were asked about the number of people in the travel party. The average group size was 3.89 people. Expenditures commonly attributed to a group, such as lodging and charter fees, were then divided by the average group size to address double-counting issues.

Adjustments were not needed to reflect expenditures for children. Most expenditures related to young visitors would be included in the group expenditures reported by an adult, including lodging, transportation, meals, and charter boat expenses. With children included in the airport passenger data, and with their expenditures in most cases accounted for by adults, adjustments related to expenditures for children were not seen as necessary. Children were observed regularly accompanying groups on Los Cabos fishing trips.

A number of observations were seen as unreasonable. Some appeared to represent expenditures by organizations running tournaments or large group events. Business conferences and corporate retreats commonly provide fishing and other activities to their employees and guests. Recognizing

⁴ A Z-test to test for differences between the two surveys was applied, with results measured at the 90% confidence level. A two-tailed approach was applied.

that such expenditures are not for one individual, and the subjectivity involved with adjusting these observations, limits were set and outliers were removed. In addition, a handful of large private yachts are maintained in Marina Cabo San Lucas and expend considerable sums for fuel, equipment, and other sportfishing expenses. While these expenditures are legitimate, building in responses from these boats into averages meant to represent all anglers was regarded as unreasonable, and they were removed. Table 3 lists the variables with observed outliers and the number of observations removed from each. Outlier limits were set based on prices and expenditures commonly seen in Los Cabos, based on the authors’ personal experience and input from local business leaders.

Table 3. Outlier Limits

Variable	Maximum Observed Value in the Raw Data Set:	Values Capped At:	Number of Observations Removed:
Package trips or tours	69,900	20,000	1
Airfare (commercial airlines, not including air taxis to your fishing site)	200,000	4,000	6
Other travel-related purchases made prior to departing home. Please specify:	150,077	50,000	1
Gasoline, fuel, and oil for your vehicle and boats (rental or personal, not including charter boats)	1,200,000	50,000	1
Charter boat fees, fishing guides	6,360,000	36,000	4
Marina expenses (Slip fees and maintenance only. Parts and items purchased are covered in the next and final expenditure question.)	700,000	7,500	5
Other (except fishing and boating equipment, which is the next question)	300,000	2,500	2
Fishing tackle (line, leaders, lures, hooks, sinkers, etc.)	10,000	2,500	4
Boat-related purchases (engine parts, rope, anchors, fenders, etc.)	25,000	2,500	3
Fishing-related electronics not reported earlier (GPS, depth and fish finders, radios, and other electronics)	80,000	5,000	2
All other miscellaneous fishing and marine equipment (coolers, pliers, gloves, storage, outriggers, etc.)	100,000	10,000	3

The final results of the angler survey are presented in the Results section and in Appendix D, “Online Survey of Anglers Who Fished in Los Cabos, and Results.”

Hotel Guest Survey

A survey was conducted of hotel guests. The purpose of this survey was to:

1. Quantify the percentage of Los Cabos visitors who fish. The results were combined with the results of the angler survey (above) to help estimate total sportfishing expenditures.

2. Gain a better understanding of the reasons why people visit Los Cabos, what they liked and disliked about their visits, and improvements that Los Cabos can make to win repeat business and develop growth in the tourism economy. This marketing information was supplied as an incentive to increase participation.

The survey was developed with input from the Los Cabos Convention and Visitors Bureau (CVB) and hotel managers. Questions regarding sportfishing activities were designed in coordination with the needs of the economic modeling process. Hotels were asked to distribute the survey to their guests as part of the hotel management survey discussed earlier in the Business Surveys section.

Eleven hotel and resort owners, representing approximately 16 resorts and lodging properties, were interviewed in person. All responding hotels reported that they could not release their guest lists to third parties. Six indicated they could send e-mail invitations directly to their guests. Two follow-up attempts were made by Southwick Associates with the other five managers to gain their help in distributing e-mail invitations, and the CVB also distributed an additional appeal, but these were not successful.

The survey was placed online, with access possible only via a unique link shared only with hotels. A copy of the survey instrument is presented in Appendix F, "Survey of Hotel and Timeshare Guests." Many of the marketing-specific results are not reported, per agreements signed with Los Cabos Convention and Visitors Bureau and Cabo tourism officials, and have been shared only with the hotels and resorts that assisted in distributing survey invitations to their guests.

In the end, six hotels sent e-mails to their guests inviting them to take the online hotel guest survey. These six hotels were located in San Jose del Cabo, Cabo San Lucas, and the "corridor" between the two towns, plus a lower-end hotel, thus providing a good representation of the types and locations of lodging available to Cabo guests. Each guest received the unique link to the online survey. Hotels did not report how many guests were sent the e-mail invitation, but in all, 1,206 hotel guest surveys were completed.

An initial analysis of the hotel guest survey showed that 70% of the respondents were timeshare guests. Personal communications with the Los Cabos Convention and Visitors Bureau show that timeshare guests represent only one-third of all visitors. Recognizing their investment in Los Cabos, it is not surprising that timeshare guests were more likely to respond to the survey. Therefore, the hotel guest survey results were analyzed twice: once for timeshare guests and again for traditional hotel guests who pay per night. When the overall guest survey results were quantified, they were weighted to represent 33.3% for timeshare guests and 66.7% for traditional hotel guests.

Without the participation of all Los Cabos resorts, hotels, and other lodging providers, effective random sampling techniques were not possible. An analysis of who responded was conducted to identify any potential biases. Please refer to the Business Survey section for further discussion. Overall, surveys were sent by hotels representing 18.1% of the available rooms in the Los Cabos region. Of the hotels that sent e-mail invitations, 96.8% of the rooms represented by the properties were from the higher-rated facilities. This reflects the limited capability of lower-end properties to communicate with previous guests.

In terms of the economic impact estimates generated by this study, the bias toward guests from higher-end resorts is expected to reduce the final numbers. Based on discussions with hotels (both higher- and lower-end) and charter businesses, many avid anglers come to Cabo just to fish, are less

desirous of the amenities provided by higher-priced resorts, and the lower-priced properties better fit their needs and budgets. These anglers often stay at lower-priced properties within Cabo San Lucas and within walking distance of the marina. These anglers are poorly represented in the survey results. Their inclusion would have been expected to increase the estimated percentage of Los Cabos visitors who fish. These avid anglers are expected to be fairly represented in the angler surveys used to estimate angler expenditures. We anticipate that the underrepresentation of this angling sector tends to reduce estimates of total expenditures.

Private Boat Survey

In the heart of Cabo San Lucas, Marina Cabo San Lucas was the primary point of departure for nearly all fishing trips in 2007.⁵ Many anglers and nonfishing Cabo guests stay on boats in the marina. As these guests would not be contacted by this project's other Cabo visitor surveys, a separate survey was conducted of private boat owners and guests in the Marina Cabo San Lucas.

The survey was distributed to boats by the management of the Marina Cabo San Lucas (MCSL). MCSL is operated by a private marina management company leasing approximately half of the 635 slips in the city-owned marina. MCSL services most private yachts in the marina, with the exception of a small 25-slip private boat section at the marina's entrance. The rest of the marina is primarily for charter boats and tourism/sightseeing operations. Therefore, the MCSL-distributed survey covered most private boats in the Marina Cabo San Lucas. The surveys were distributed in the fall of 2007. Recognizing that many private boats are managed by caretakers for absentee American owners, response rates were limited. Despite this problem, 38 private boat surveys were completed and provided a relative understanding of private boat owners' expenses and opinions. A copy of the survey and the results are presented in Appendix G, "Survey of Private Boat Owners." Results are not reported, per confidentiality commitments with MCSL. Only aggregated results necessary for the economic analysis are reported here.

General Survey of U.S. Anglers

To help the Los Cabos community better understand how to market toward U.S. anglers, a survey was conducted of U.S. anglers regarding their fishing activities and preferences. The survey did not disclose that the purpose was to learn how Cabo as a fishing destination is perceived among U.S. anglers and where U.S. anglers would prefer to fish if they traveled outside the U.S. By comparing the results to the survey of anglers who visited Los Cabos, improved marketing strategies and tactics can be developed.

The survey was conducted online. The survey was first pretested by distributing the survey in 2006 to a small sample (N = 50) of online anglers randomly selected from the AnglerSurvey[®] panel list.⁶ The pretest anglers were drawn from a pool who indicated they had previously fished for

⁵ In 2007, a new marina was under construction in San Jose del Cabo, but was not expected to open for business until 2008. Along with Marina Cabo San Lucas, these are the only two marinas in the Los Cabos region. Fishing trips depart out of the East Cape area, but very few of these boats are privately owned. Most are owned by resorts and used as charter boats. Without a marina, East Cape boats anchor off the beach. A couple of boutique resorts along the coast were noticed to have boats anchored for use by guests, but based on observation, these are very few. Their exclusion is not expected to impact the overall results and interpretations of this study.

⁶ AnglerSurvey[®] is a monthly service of Southwick Associates that helps industry and fisheries managers understand anglers' purchases and trends via an ongoing series of monthly surveys of a panel of approximately 2,000 U.S. anglers.

billfish. Based on the results, several minor edits were made to the survey questionnaire, including the addition of several species and rewording of questions.

Anglers who were sent invitations to the survey were identified via several sources. The primary source was the AnglerSurvey panel of U.S. anglers owned by Southwick Associates, Inc. Panel participants were asked during the course of the regular monthly AnglerSurvey questionnaires if they were willing to participate in a separate survey. Recognizing that Los Cabos's primary sportfishing marketing and reputation is based on billfish, the survey invitation indicated that the survey was specific to billfishing. This helped to dissuade anglers who travel to fish for other species not endemic or dominant in Cabo, such as salmon. This indirect "screener" question helped the results better reflect anglers more likely to visit Los Cabos versus other locations.⁷

Additional survey announcements were posted on saltwater-specific web sites and magazines including *Marlin*, *Sport Fishing*, and The Billfish Foundation Web site. Using known profiles of U.S. anglers, responses to this online survey were weighted based on each respondent's demographic characteristics to ensure the results represent U.S. anglers as well as possible. The weights were based on national saltwater angler profiles from the U.S. Fish and Wildlife Service's *National Survey of Fishing, Hunting and Wildlife-Associated Recreation*. The responses were then further subjected to a proprietary process of weighting developed by Southwick Associates, Inc. as part of its AnglerSurvey online panels. The survey instrument and the results are presented in Appendix E, "Survey of U.S. Anglers Who May or May Not Have Visited Los Cabos, and Results."

ECONOMIC MODELING

NOTE: The detailed report provided by FIRMUS Consulting regarding the development and operation of the economic model is provided in Appendix H, "Economic Model Development Report by FIRMUS Consulting."

Economic input-output models, referred to as I-O models, are statistical simulations of a regional or national economy. Using information regarding the flow of products and dollars from consumers to businesses, I-O models help explain the increase or decrease in economic activity occurring as a result of dollars being injected into an economy, a change in employment, and more.

I-O models applicable to sportfishing were not available for Mexico, the State of Baja California Sur, or the Los Cabos region. This model was tasked with producing reasonable estimates of the jobs, tax revenues, and overall economic impact from sportfishing. Currently, there are no models or sources of economic multipliers available for the region under study, so it was necessary to develop an ad hoc model to estimate the economic contribution of sportfishing to the Los Cabos economy. This methodology can be applied in other locations in Latin America where detailed economic information and data are also scarce.

⁷ Invitation sent to AnglerSurvey participants:

"Hello, Anglers--Southwick Associates is working to help insure the conservation and protection of billfish populations and we need your help. The AnglerSurvey asked if you would be willing to help us by taking an online survey. Please follow the link below to access this survey:

http://www.southwickassociates.com/surveys/billfish_survey/PRIVATE_UNIQUE_CODE All responses will be completely confidential, and your name and e-mail address will not be circulated to others. Thank you in advance for helping us in this study."

The model was developed by a team of specialists experienced in sportfishing and the operations of the Mexican economy:

- Southwick Associates (SA)—A firm based in Florida with extensive experience in the surveying of economic activities related to fishing and hunting. SA managed project design and led the survey efforts.
- FIRMUS Consulting (FIRMUS)—A firm based in Mexico City specializing in economic and finance studies. FIRMUS has been in charge of the development of the economic impact model and investigating sources of economic data in Mexico.

Input to the economic model was developed by the multiple angler and visitor surveys described earlier. Data used by the model to report the economic impacts resulting from angler expenditures were obtained from the various specifically designed surveys of charter boat companies, hotels and resorts, and the general business community conducted in 2007 and 2008.

The expenditures, or input, used in the economic model were estimated from the survey of people who fished in Los Cabos. This survey was discussed earlier.

The model first divides angler expenditures into two types of expenses: dollars that remain in the Los Cabos economy, and dollars that immediately leave the area for suppliers of products located outside the Los Cabos area, such as airlines, companies exporting supplies to the isolated Los Cabos area, and more. When estimating the jobs and tax revenues generated in Los Cabos, only the dollars remaining in the local economy were considered.

The economic model was designed to follow the dollars spent by anglers as they move through the different layers of the Los Cabos economy. The model starts by allocating anglers' dollars to the products reported in the survey such as charter boats, lodging, food, transportation, tackle, souvenirs, etc. The portion of these dollars that then immediately leave the Los Cabos economy is subtracted. The remaining dollars are assigned to different economic sectors based on the results of the business surveys. The business surveys identified the proportion of business expenditures sent to other economic sectors, the portions spent in the form of household payments (wages, salaries, and business profits), and taxes. The businesses receiving the dollars then re-spend them, creating an additional wave of impacts. At each level, only the dollars remaining in the Los Cabos community are considered. These rounds of economic activity, when tallied together, constitute the "economic effect" of anglers' dollars.

The sum of expenses made by businesses in the supply chain is called the indirect effect, while the sum of the expenditures by employees, business owners, and their families is the induced effect. The direct effect is the amount spent by anglers that starts the whole process. The direct effect, indirect effect, and induced effect add up in order to obtain the total multiplier effect:

$$\text{Multiplier} = \frac{\text{Direct Effect} + \text{Indirect Effect} + \text{Induced Effect}}{\text{Direct Effect}}$$

The multiplier depends on the number of rounds in the economy, and the number of rounds is optimal when the indirect and induced effects are too small to reasonably measure. In this project, the number of spending rounds was capped at four, meaning the analysis ended after anglers' dollars changed hands four times, with few remaining in the Los Cabos economy at that point.

The economic multipliers for Los Cabos are relative compared to what one might find elsewhere in Mexico. Despite Mexico's higher level of reliance on labor compared to the U.S. and other countries, the multiplier effect in Los Cabos is limited, as the economy behaves like an island economy. Manufacturing activities are practically absent, and most of the investment and consumer goods are imported from outside the region. This was confirmed through information obtained from the Ministry of Communications and Transportation (SCT), which reports that the Los Cabos region gets most of its supplies via highway and maritime transport from the city and port of La Paz.⁸ If the Los Cabos economy was more vertically integrated, with more of the economic benefits remaining in the region, the current economic multiplier of 1.78, as determined in this study, would rise closer to 2.7, a figure that is not distant from similar analyses of greater integrated continental economies in other countries.

Employment Considerations

The business surveys collected information that allowed the estimation of the additional jobs that respondent companies would hire if their revenues increased by a certain amount (including sportfishing-related companies). However, these data reported the marginal increase in jobs expected from revenue increases and not the total jobs from all revenues, which could be quite different. Therefore, other sources were consulted to estimate the jobs supported by Los Cabos sportfishing.

Employment, in general, is a function of total economic activity. Any specific level of economic activity requires some corresponding level of employees to provide the goods and services demanded. Data from the Instituto Nacional de Estadística, Geografía e Informática (INEGI) reports the gross state product for Baja California Sur in 2004 was 9.209 billion pesos.

In March, 2004, an economic study of the region's timeshare market was commissioned by ASUDESTICO, an association of timeshare providers. This study, conducted by Ragatz Associates (part of RCI) with assistance from ECONorthwest, used the Michigan Model of World Production and Trade to estimate jobs in Los Cabos resulting from the timeshare customers. While the report indicates that it estimates jobs in the Los Cabos region, it appears the results actually report jobs created in all of Mexico. The jobs created by local activity are generally greater at the national level than the local level. The results indicate that every \$15,753.42 spent in 2002 supported one job. In 2007, based on Mexico's inflation rates, this amount would equate to \$18,156.45. Therefore, to estimate total jobs at the national level, anglers' expenditures in Los Cabos are divided by \$18,156.45. The result is 34,895 jobs. To generate an estimate of the jobs supported locally, the national figure needed to be revised downward. Based on similar economic studies of state- and national-level sportfishing impacts in the U.S. of 30%, and considering the similar difference between the Los Cabos multiplier of 1.78 (as found in this study) and a typical national level multiplier of 2.4, the national employment figure was reduced by 30% to arrive at the estimated sportfishing-related jobs in Los Cabos of 24,426.

⁸ Annual Statistics of Maritime Transport 2005-2006, Coordination of Ports and Maritime Transport, Ministry of Communications and Transportation.

Tax Revenues

The government benefits from higher tax revenues arising from the sportfishing industry in different ways at federal and local levels:

- Income tax (ISR, federal) = 28% of earnings
- Value added tax (IVA, federal)⁹ = 15%
- Tax on payroll (ISN, local) = 2.5% of wages and taxes paid, levied on the company and not on paychecks.
- Tax on hotel services (ISH, local) = 3%

The ISH¹⁰ has two components: a) Hotels: ISH taking as its base 40% of total invoicing; b) Timeshare: ISH based on 50% of total maintenance fees. The total amount collected by the government (Tt) is:

$$Tt = ISR + IVA + ISN + ISH$$

HOW THE MODEL WORKS

The process below explains how the model works:

Step 1. Determine how much anglers spent in Los Cabos. This is a function of the number of anglers multiplied by the total amount spent, on average, per angler for each item commonly purchased in Los Cabos. Items purchased outside Los Cabos are excluded. The result is the total amount spent in Los Cabos by anglers.

Step 2. Identify how anglers' dollars are divided throughout the economy. This is done by taking the total dollars determined in Step 1 and multiplying them by ratios that explain how much goes to each major sector of the economy (retail, wholesale, manufacturers, service companies, professional services (accounting, legal, etc.), other businesses, and employees and business owners (payments to households). These apportionments were determined by the hotel management, charter boat, and general business surveys. The results tell us, for example, that \$3.48 of the \$48.66 spent on taxis is spent by the taxi company on manufacturers.

Step 3. Determine how many of those dollars are exported outside of Los Cabos. The model starts with angler expenditures made within the Los Cabos economy. Once a business receives these dollars, much of the money is immediately sent to suppliers and vendors outside the area. From 4% to 83% of business expenses remain in the local economy, with an approximate average of 40% remaining. This step multiplies each apportionment identified in Step 2 by a ratio that reports how much remains in Los Cabos. These ratios were developed by the hotel management, charter boat, and general business surveys. This step is also applied to household expenditures, recognizing that

⁹ Determined through the sum of intermediate demands.

¹⁰ Decree number 1586, Finance Law for the State of BCS.

households often must purchase common items outside their area.¹¹ The amount left after this step is the net economic activity, or indirect effect, accruing to the Los Cabos economy after the first round of spending. This amount equals 38.4% of anglers' original expenditure (the direct effect). Only the dollars found to remain in the local economy move on to the next step.

Step 4. Estimate the effects of the additional rounds of spending. Once the taxi driver spends his angler dollar, each successive round of spending injects 38.4% of the previous round of spending into the economy. For example, for each dollar spent by anglers, the first round of spending was worth 38.4 cents. The second round contributed 38.4% of the first round's value, which is an additional 15 cents. The third and fourth rounds contributed 6 cents and 2 cents, respectively. At this point, based on the diminishing level of returns, the impact analysis ceased. Therefore, the total economic activity is \$1.78, which includes the \$1 direct effect (or angler expenditure) plus the indirect and induced effect of \$0.78.¹² This amount is also known as the "total multiplier effect," sometimes referred to as "economic output" or the "ripple" effect.

Step 5. Estimate jobs and tax revenues. Jobs and tax revenues are based on the total multiplier effect as calculated at the end of Step 4. The employment ratios reported earlier were matched with the corresponding amount of revenue to estimate the total number of jobs. Business tax revenues were estimated by multiplying the tax rates reported earlier with the total economic effect and the expected mark-up applied by each sector. The VAT, or sales tax was applied directly only to anglers' expenditures. The VAT estimates capture only the revenues from anglers (the direct effect) and do not capture the revenues generated as part of the indirect effect (business and household expenditures). The payroll tax was applied to the mark-up assigned to each stage, and the hotel tax was applied only to anglers' reported expenditures for lodging.

National Impacts

Estimated impacts to the national economy were based on the jobs estimate. Using data from the ASUDESTICO report, it is estimated that 34,895 jobs are supported across Mexico by Los Cabos angler expenditures, as described earlier. A national I-O model was not available. Therefore, it was not possible to develop estimates of the output generated by Los Cabos sportfishing at the national level. Instead, using Gross Domestic Production (GDP)¹³ and national employment data from the Instituto Nacional de Estadística, Geografía e Informática (INEGI), it was possible to estimate the contributions of Los Cabos sportfishing to the national economy.

Using 2007 Gross Domestic Product data from INEGI, Mexico's GDP was 8.659 trillion pesos. Employment was 42.906 million. Therefore, each job on average provided 201,818 pesos to the

¹¹ The ratio reporting the amount of household expenditures sent outside the economy is taken from the business survey. While the proportion of household expenditures sent outside the local economy is expected to be less than businesses expenditures, no other source of information was available. The use of the business ratio is expected to reduce the overall economic impacts reported in this study.

¹² Input-output analysis typically addresses induced effects separately. Based on the limited information available on personal consumption patterns, such separations were not possible. Payments to households via wages, salaries, and business profits are treated as a separate economic sector, as mentioned in Step 3.

¹³ GDP is the value of goods and services produced domestically, whether by domestic or foreign-owned firms, and is the primary tool to measure the size and strength of national economies. Output, as measured by I-O models, is the total output of all sectors, whether those outputs turn into inputs used by another sector or go to satisfy final demand. In that respect, output double-counts a portion of final production and by nature is reported in greater dollar figures compared to GDP.

national GDP. With 34,895 jobs nationally supported by Los Cabos anglers, this translates into a contribution to GDP of 7.042 billion pesos, or \$US 652.078 million.

Likewise, tax revenues can also be calculated. According to the Secretaria de Hacienda y Credito Publico, Mexico's 2007 federal tax revenues were 1.002 trillion pesos. With 42.907 million jobs in Mexico, this translates into an average of 23,376 pesos of tax revenues contributed per job. The authors recognize the problems associated with assuming a perfect relationship between jobs and tax revenues, however, no other reliable form of estimating tax revenues was possible. With 34,895 jobs nationally as a result of Los Cabos sportfishing, this translates into 815.706 million pesos in tax revenues in 2007 from Los Cabos sportfishing.

3 RESULTS

NUMBER OF ANGLERS

Due to its remote location and limited highway access, most visitors likely to fish arrive in Cabo via the Los Cabos International Airport. A smaller number arrive via car or private boat. Personal communications with officials from the Los Cabos Convention and Visitors Bureau report that very few, if any, cruise ship passengers go fishing due to late cruise arrivals each day and limited time in port.¹⁴ It was also reported that very few visitors arrive by private automobile, based on the time, costs, and risks involved with driving the length of the Baja California peninsula. Nearly all visitors who fish would be expected to arrive by air. As a result, this report tracks only the number of visitors who arrive by air. The exclusion of anglers and visitors who arrived by other means results in a small degree of underestimation in the final results.

Annual passenger loads to the Los Cabos airport have increased significantly in recent years. Total arrivals increased 150% from 1997 through 2007 (Figure 1). Two sources of data were available regarding the number of arriving passengers: the Mexican federal government's Instituto Nacional de Estadística Geografía e Informática's National Statistics Institute, or NSI and the DataTur program, managed by Mexico's Department of Tourism. The numbers of visitors reported by each are similar, with the DataTur numbers on average only 1.3% to 1.5% higher each year (2005 through 2007) compared to NSI. These two sources may be based on the same data collection effort, but details could not be located about the original, raw data sources. NSI data provided arrivals data back to 1997, while DataTur only reported back to 2005. Therefore, the NSI data is used as the source of visitor data for this project. Other data sources were identified, including arrival data reported in a 2003 Los Cabos marketing study and 2004–2005 data from the firm managing the airport, but these sources did not report 2006 or 2007 passenger information. In 2007, 1,426,983 passengers arrived at the Los Cabos International Airport.

¹⁴ More than 675,000 visitors arrive in Cabo San Lucas annually via cruise ships.

Figure 1. Total Arriving Passengers (National and International), Los Cabos International Airport (source: National Statistics Institute)

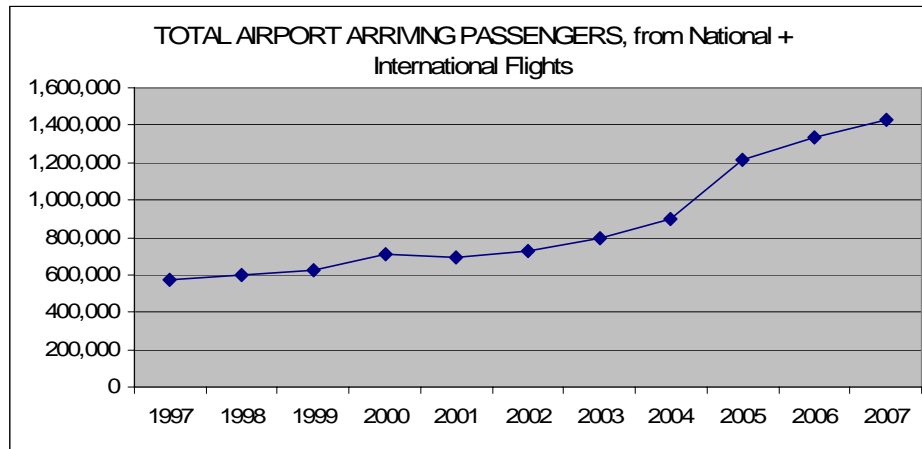
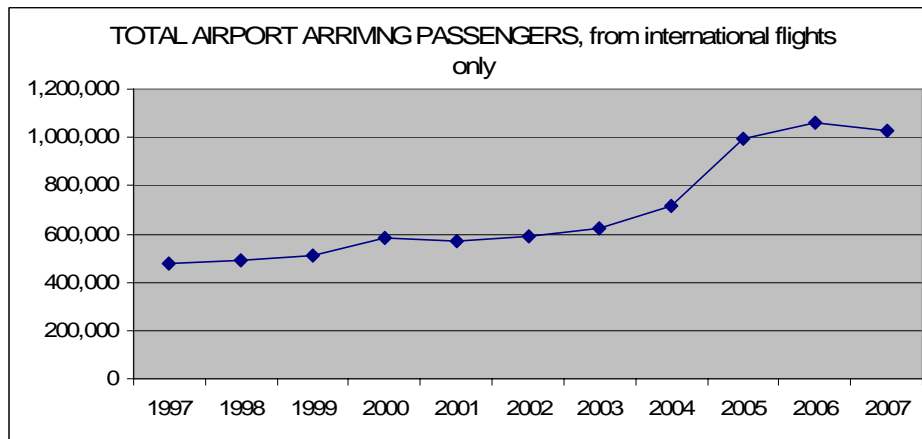


Figure 2 reports trends for passengers arriving on international flights only. On these flights, a majority of passengers are American. These tables report where flights originated, not the nationality of all passengers. It is possible that a greater number of Mexican citizens are visiting Los Cabos, but also possible that a greater number of international visitors are arriving from other Mexico cities and not directly from the U.S.

Figure 2. Total Arriving International Passengers, Los Cabos International Airport (source: National Statistics Institute)



Number of Hotel and Timeshare Guests Who Fish Annually

The number of anglers was estimated by multiplying the percentage of hotel and timeshare guests who fished by the total number of arriving airport passengers. Of hotel guests, 31.25% indicated they fished. In a later question, only the individuals who reported fishing were asked to rate the quality of fishing. Of these individuals, 22.3% reported that they did not fish. This would indicate an additional 6.9% of guests did not fish. Overall, these two questions indicate 24.3% of hotel guests fished during their visits to Los Cabos.

Of visitors using timeshares, 45.2% indicated they fished. In a later question, only those individuals who reported fishing were asked to rate the quality of fishing. Of these individuals, 22.2% reported that they did not fish. This would indicate an additional 10.0% of guests did not fish. Overall, these two questions indicate that 35.2% of timeshare guests fished during their visit to Los Cabos.

Timeshare guests represent one-third of all visitors, with the other two-thirds using traditional hotel accommodations.¹⁵ Using a weighted average of hotel and timeshare guests, 27.9% of all guests fished in 2007 during their visits to Los Cabos.

This estimate agrees with a study by SECTUR, or the Mexico Ministry of Tourism, which reported that 26.9% of Los Cabos visitors fished. While the source of this estimate could not be located, based on conversations with area hospitality business, it is believed to have been gained from a survey of departing airport passengers in the mid-2000s.¹⁶ Another tourism study was conducted in 2003 by Marketing Consultants for the Convention and Visitors Bureau. This study reported that 18.6% of travel *groups* who visited Los Cabos fished, with the average group having 2.5 people. Descriptions of who was included in the study were not located. The study reported that, of all tours and trips purchased by visitors in Cabo, 20.5% were fishing trips. Fishing was tied with snorkeling for the number one choice of groups' trips and tours.

Several possible biases are identified that might affect these results. First, it is possible that the surveys conducted as part of this project were more likely to be distributed by hotels with a greater interest in fishing, and therefore possibly with a greater percentage of guests who fish. While steps were taken to ameliorate this concern by encouraging all resorts and hotels to participate, and by wording communications to minimize biases toward fishing, such a bias may still exist in the results. To help minimize any possible bias, the estimated percentage of visitors who fish, as determined by the project's surveys, are averaged with the estimates found by the Ministry of Tourism and Marketing Consultants.¹⁷ Using a straight average, it is estimated that 24.5% of Los Cabos hotel and timeshare visitors fish. Based on the number of visitors presented in Table 5, 349,611 hotel and timeshare visitors fished in Los Cabos in 2007. The second possible bias may affect the estimated percentage of visitors fishing in Los Cabos and is described in the Methods section. The results are skewed toward guests of higher-end resorts. Many visitors who come just to fish are not as interested in the amenities provided by higher-priced resorts. Lower-priced properties fit their needs and budgets. These anglers often stay at the lower-priced properties within walking distance of the Marina Cabo San Lucas. These anglers are poorly represented in the survey results. Their inclusion would be expected to have increased the estimated percentage of Los Cabos visitors who fish.

¹⁵ Personal communications with officials of the Los Cabos Convention and Visitors Bureau.

¹⁶ Behavior and Trends of Recreational Sports Fishing in Mexico, Executive Summary. Under contract by Investigacion Estadistica Y Demografica , S.A. de C.V. (IED) for SecTur (Ministry of Tourism). Date unknown (but post-2001, based on report content).

¹⁷ The Methods section describes a bias that likely reduces the estimated percentage of visitors fishing in Los Cabos. The survey was biased toward guests of higher-end resorts. Many visitors who come just to fish are not as interested in the amenities provided by higher-priced resorts. Lower-priced properties fit their needs and budgets. These anglers often stay at the lower-priced properties within walking distance of the Marina Cabo San Lucas. These anglers are poorly represented in the survey results. Their inclusion is expected to increase the estimated percentage of Los Cabos visitors who fish.

Number of Anglers Using Marinas

Additional anglers arrive by private boat, and most stay in the Marina Cabo San Lucas. They may motor from the U.S. to Cabo, or keep their boats year-round in Cabo and fly in occasionally with guests for visits of varying lengths. All these anglers/boaters would not be included in the estimate of hotel and timeshare guests who fish. Estimates of the number of anglers staying in the marina were developed using data from the private boat survey (see the Survey Methods section for a discussion) along with information provided by the Marina.

Table 4 presents the estimated number of boats using Marina Cabo San Lucas. Counts were taken using aerial photography provided by the marina. Marina Cabo San Lucas leases just a portion of the marina from the city, with the rest occupied by the various charter boat unions. Tours of the marina with marina officials and charter boat owners showed which docks were leased by which organizations, and how each organization uses their docks. Along with a small private boat marina at the entrance of the marina, Marina Cabo San Lucas is the only operation providing slips to private boats. The rest of the marina is largely used for charter operations catering to visitors of the hotels and timeshare properties.

Table 4. Number of Boats in the Marina Cabo San Lucas

Number of Boats		# of boats [^]	Avg Length	Total length
Marina Cabo San Lucas		305	33	10,065
East union docks		60	28	1,680
West union docks	panga	50	19	950
	all others	180	24	4,320
Entrance marina	panga	25	19	475
	all others	15	24	360
		635		17,850
[^] Number of boats, not slips. Many slips have multiple boats. A number of pangas are kept outside the marina and are not part of these estimates.				

In a personal communication with the Marina Cabo San Lucas manager, it was reported that, while many of the boats in the marina are part of charter boat operations, 60% of the boats are privately run and not used for charter boat operations. These individuals responded to a survey distributed by the Marina. Ninety-seven percent of responding boat owners used their boats to fish while in Los Cabos. The average party per boat was 7.8 individuals. The typical length of visit for survey respondents was 20 days, of which 4.8 days were spent fishing. The average total days spent in Los Cabos annually was 57, indicating that the typical boat owner makes about 2.85 trips per year. With 7.8 individuals per party, 2.85 trips per year, and with approximately 198 private boats in the marina (both Marina Cabo San Lucas and the private marina at the harbor mouth), this translates into 4,402 visitors aboard private boats in the marina in 2007.¹⁸

¹⁸ Marina officials reported that during the peak months, the number of boats wanting to use the facility exceeds the slips available. These boats typically anchor outside the harbor and use launches to access the shore. Many of these boats are expected to fish while in Los Cabos, but without data regarding the number of boats anchoring outside, it is not possible to develop estimates with any reliability.

Adding the number of Los Cabos hotel and timeshare guests to the number of marina-based anglers provides the overall estimate of 2007 Los Cabos anglers (Table 5).

Table 5. Total Los Cabos Anglers in 2007

Hotel and timeshare anglers:	349,611
Marina-based anglers:	<u>4,402</u>
Total Los Cabos Anglers:	354,013

With 1,426,983 visitors arriving each year at the Los Cabos airport, anglers represent nearly 25% of all Los Cabos visitors who fly in annually. Considering the additional 675,101 day visitors who arrive by cruise ship annually, anglers represent approximately 17% of all visitors.

ANGLER EXPENDITURES

Expenditure estimates were generated for anglers who stayed at hotels and timeshares, and for anglers who used the marina. Separate considerations necessary for each estimate are explained as follows.

Expenditures for Hotel- and Timeshare-Based Anglers

A survey was conducted of anglers (see the Visitors Survey under Section 2, Methods). Inquiries were made about items typically purchased by anglers. The results are presented in Table 6. Efforts were made to eliminate unrealistically high responses, or “outliers,” as described in the Methods section. Adjustments were also made to ensure that the results reflected the average amount spent per angler and not the amount spent for the entire travel or fishing party. Both of these adjustments were discussed previously. The total spent per angler per trip is \$1,801.27. Considering there were 349,611 anglers in Los Cabos in 2007 who stayed at hotels and timeshares, the total spent was \$629,743,806.

Please note that only expenditures typically made in Los Cabos are included. Expenditures often made outside of Los Cabos or accruing to businesses outside the region were excluded, such as airfare. While a portion of airfare does impact the Los Cabos region via the international airport, most of these dollars accrue elsewhere and are excluded from this analysis. (See Table 6.)

Table 6. Average Expenditures Per Angler

ITEM	N	Mean (adjusted for the number of people per group, and outliers eliminated)	Minimum (not adjusted for number of family in group. Outliers eliminated)	Maximum (not adjusted for number of family in group. Outliers eliminated)
Gasoline, fuel and oil for your vehicle and boats (rental or personal, not including charter boats)	633	\$129.96	0	20,000
Taxis, shuttle vans, etc to get to hotels, marinas, restaurants, etc.	634	\$47.68	0	2,500
Charter boat fees, fishing guides	630	\$393.42	0	14,000
Car rental (not including any fuel purchased)	634	\$38.78	0	2,500
Boat rentals	634	\$56.03	0	9,000
Marina expenses (slip fees & maintenance only. Parts and items purchased are covered in the next & final expenditure question)	629	\$38.44	0	6,000
Hotels/motels/resorts	634	\$456.67	0	80,000
Restaurants, bars, carry-out food	634	\$224.73	0	40,000
Groceries, food, liquor bought in stores (not in restaurants or bars)	634	\$87.85	0	14,400
Ice	634	\$4.94	0	400
Bait (Natural bait only, such as mackerel and bait bought at the launch for chartered trips. Please do not include lures.)	634	\$43.42	0	5,000
Gifts and souvenirs of any type	634	\$80.55	0	30,000
Entertainment (nightclubs, attractions, tours, etc.)	634	\$86.88	0	25,000
Fish processing and shipping	634	\$23.12	0	5,000
Taxidermy (only taxidermy fees paid to Mexico businesses, not U.S. taxidermists)	634	\$0.93	0	1,400
Personal items (toiletries, medicine, etc.)	634	\$10.13	0	2,000
Other (except fishing and boating equipment, which is the next question)	632	\$9.92	0	2,500
Fishing tackle (line, leaders, lures, hooks, sinkers, etc.)	630	\$28.23	0	2,500
Boat-related purchases (engine parts, rope, anchors, fenders, etc.)	630	\$11.35	0	2,500
Fishing-related electronics not reported earlier (GPS, depth and fish finders, radios, and other electronics)	632	\$7.85	0	5,000
All other miscellaneous fishing and marine equipment (coolers, pliers, gloves, storage, outriggers, etc.)	631	\$20.42	0	10,000
TOTAL:		\$1,801.27		

Expenditures for Marina-Based Anglers

Expenditures for marina-based anglers were calculated slightly differently. Expenditures were based per boat and not per angler. This was done because there is a solid accounting of the number of boats and access to the boat owner, who is the one expected to handle most expenditures, was available. It was not feasible to survey guests of the boat owner. Based on results of the private boat owner survey, the average amount spent per boat trip to Los Cabos is \$6,779.09 (Table 7). Each boat hosts 2.85 trips per year (57 days total) and remains idle the remainder of the year. With 198 private boats using the marina, and with each boat hosting 2.85 trips per year, the total annual expenditures by private boats using the marina is estimated to be \$3,825,440.¹⁹

Table 7. Average Amount Spent Per Boat Per Trip (Each boat averages 2.85 trips per year.)

ITEM	Avg. Per Boat
Gasoline, fuel, and oil for your vehicle and boats (rental or personal, not including charter boats)	\$1,636.58
Taxi's, shuttle vans, etc to get to hotels, marinas, restaurants, etc.	\$126.58
Charter boat fees, fishing guides	\$172.37
Car rental (not including any fuel purchased)	\$43.95
Boat rentals	\$0.39
Marina expenses (Slip fees & maintenance only. Parts and items purchased are covered separately.)	\$1,185.05
Lodging: Please report the type of lodging used and the cost:	
Hotels/motels/resorts:	\$52.63
Timeshare (please only report the cost associated with your trip and not any part of the purchase price):	\$26.32
Campgrounds	\$0
Restaurants, bars, carry-out food	\$869.74
Groceries, food, liquor bought in stores (not in restaurants or bars)	\$601.58
Ice	\$22.50
Bait (Natural bait only, such as mackerel and bait bought at the launch for chartered trips. Please do not include lures.)	\$138.84
Gifts and souvenirs of any type	\$84.21
Entertainment and amusement admission fees	\$50.00
Fish processing and shipping	\$21.13
Taxidermy (only taxidermy fees paid to Mexico businesses, not U.S. taxidermists)	\$26.32
Personal items (toiletries, medicine, etc.)	\$81.58
Other (except fishing/boating equipment, which is the next question)	\$60.53
Rods and reels	\$155.53
Fishing tackle (line, leaders, lures, hooks, sinkers, etc.)	\$176.97

¹⁹ The authors consider this estimate to be low, based on other data. For example, the cost to rent a slip is \$1.25 per foot (length of slip) per day. With the average boat approximately 33 feet, and with 198 boats, and with 90% annual occupancy (70% summer, 100% rest of the year), this equates to \$2.7 million just in slip fees.

Boat-related purchases (engine parts, rope, anchors, fenders, etc.)	\$1,034.87
Fishing-related electronics not reported earlier (GPS, depth & fish finders, radios, and other electronics)	\$60.53
All other miscellaneous fishing and marine equipment (coolers, pliers, gloves, storage, outriggers, etc.)	\$226.84
TOTAL	\$6,776.09

Total Angler Expenditures for 2007

Adding the total spent by Los Cabos hotel and timeshare anglers to the amounts spent by private boat users provides an overall estimate of 2007 Los Cabos anglers:

Hotel and timeshare anglers: \$629,743,806
Marina-based anglers: 3,825,440
Total Los Cabos Anglers: \$633,569,246

For all hotel/timeshare and marina-based anglers combined, the average amount spent was \$1,789.68.

ECONOMIC MODEL RESULTS

Impacts to the Los Cabos Economy

The economic model reports that when anglers spend money in Los Cabos, the local economy responds with:

- ✓ \$1.776 in total economic activity (output or ripple effect) for each dollar spent by anglers;
- ✓ 1 job for every \$18,156.45 spent; and
- ✓ \$721.99 in local and federal tax revenues per visiting angler.

With \$633,569,246 spent by 354,013 anglers locally in 2007, the Los Cabos economy responded with:

- ✓ \$1,125,218,980 in total economic output;
- ✓ 24,426 jobs; and
- ✓ \$245,516,186 in local and federal tax revenues.

Impacts to the Mexico National Economy

The total economic contributions to the national economy are greater. When dollars move out of the Los Cabos economy to La Paz and other regions, the benefits to Mexico's national

economy continue to grow. As a result of the \$633.6 million spent by Los Cabos anglers, the following impacts are estimated to accrue to Mexico’s national economy:

- ✓ 7.042 billion pesos, or US \$652.078 million, in gross domestic product (GDP) (not to be confused with “output” as is reported for the Los Cabos regional impacts. See the Definitions section to learn of the differences);
- ✓ 34,895 jobs; and
- ✓ 815.706 million pesos in federal tax revenues, or US \$75.53 million (income, VAT, food and beverage, imports, and other tax revenues).

RESPONSE TO SURVEY QUESTIONS REGARDING SELECTED FISHERIES CONSERVATION AND THE LOS CABOS EXPERIENCE

The Los Cabos angler survey presented several questions intended to help understand the relationship between angling success in Los Cabos, anglers’ attitudes towards fisheries conservation efforts, and potential effects of these attitudes on sportfishing tourism and the local economy. In addition, the angler survey, along with the hotel/timeshare guest survey, provided feedback about visitors’ overall satisfaction with their Los Cabos visit. A summary of the results is presented here.

Angling Success in Los Cabos

Visitors who fished in Los Cabos were asked to identify fish species that they targeted in anticipation of their trips (Table 8), and what species they actually caught on their most recent Cabo trips (Table 9). The results of these questions provide insight into anglers’ motivations and a gauge of actual success encountered during the trips.

Table 8. Target Species Anticipated While Planning Most Recent Trip to the Los Cabos Area (Multiple responses per individual are common.)

N of respondents = 613	N	Percent of Cases
Species expected - Marlin	550	89.7%
Species expected - Sailfish	325	53.0%
Species expected - Dorado (mahi-mahi, dolphinfish)	582	94.9%
Species expected – Tuna	531	86.6%
Species expected - Wahoo	288	47.0%
Species expected - Sierra mackerel	69	11.3%
Species expected - Roosterfish	225	36.7%
Species expected - Yellowtail	97	15.8%
Species expected - Bottom fish	89	14.5%
Species expected - Robalo (snook)	3	.5%
Species expected - Didn't catch any	1	.2%
Species expected - Don't know	2	.3%

Dorado (dolphinfish), marlin, and tuna were clearly the most targeted species, with 87% to 95% expectations. Actual angling experiences showed very good overall success—only 1.3% of the sample failed to catch any fish. Marlin were caught by 73.9% of the anglers and dorado by 77.5%. Anglers targeting these two species did, on average, achieve success rates of approximately 82%. Success rates across all named species are given in Table 9.

Table 9. Species Caught on Most Recent Los Cabos Trip (Multiple responses per individual.)

N of respondents = 612	N	Percent of Cases
Species actual - No fish caught	8	1.3%
Species actual - Marlin	452	73.9%
Species actual - Sailfish	166	27.1%
Species actual - Dorado (mahi-mahi, dolphin)	474	77.5%
Species actual - Tuna	400	65.4%
Species actual - Wahoo	87	14.2%
Species actual - Sierra mackerel	58	9.5%
Species actual - Roosterfish	114	18.6%
Species actual - Yellowtail	46	7.5%
Species actual - Bottom fish	81	13.2%
Species actual - Robalo (snook)	2	.3%
Species actual - Don't recall species	2	.3%
Total	1890	308.8%

Table 10 shows success rates by species, that is the percentage of Los Cabos anglers who reported catching the fish species that they targeted.

Table 10. Success Rates by Species (percent caught/percent targeted)

N of respondents = 612	Success rates (%)
Species actual - Marlin	82.4
Species actual - Sailfish	51.1
Species actual - Dorado (mahi-mahi, dolphin)	81.6
Species actual - Tuna	75.5
Species actual - Wahoo	30.2
Species actual - Sierra mackerel	84.1
Species actual - Roosterfish	50.7
Species actual - Yellowtail	7.5%
Species actual - Bottom fish	47.5
Species actual - Robalo (snook)	91.0

The success rates of anglers targeting marlin, dorado, and tuna were quite high. It is of interest to note that the other pelagic big game species—sailfish and wahoo—were not caught nearly as frequently.

Los Cabos Visitors Results

The international sportfishing tourism market is highly competitive. Anglers’ expectations dictate where they decide to fish. Expectations are heavily influenced by reports and feedback from fellow anglers and from the sportfishing media.²⁰ Los Cabos anglers were asked two general categories of questions to better gauge how they might respond to potential fisheries management changes currently being debated in Mexico. Results from the first category of questions regarding billfish harvests are presented in Table 11. The vast majority of anglers (over 87%) reported they would be less likely to return to Los Cabos if commercial harvests of billfish were to increase. Conversely, if anglers perceive that commercial harvests have been further restricted, 70% reported that they would be more likely to return. Changes to the recreational limits on billfish can also impact the decision to return. Tighter limits on recreational harvests would actually encourage anglers to return, while allowing a greater harvest of billfish would discourage return visits, thus indicating a strong interest in catch-and-release fishing. Table 12 shows that the majority of anglers surveyed would be more likely to return to Los Cabos than elsewhere if Los Cabos minimized billfish harvests and managed fisheries to maximize sportfishing opportunities.

Table 11. Would you be more or less likely to return to Los Cabos if you knew:

Question:	Less Likely to Return	More Likely to Return	The Same / No Change
Commercial harvest of billfish recently began or increased since your last visit?	87.6%	1.1%	11.3%
Commercial harvest of billfish in Los Cabos was recently restricted or stopped completely, even outside of the 50-mile exclusion zone?	4.3%	84.5%	11.3%
Bag limits for billfish were tighter (meaning even more would be released than currently)?	2.3%	70.3%	27.4%
Bag limits for billfish were looser (meaning you can keep more billfish than before)?	70.0%	3.1%	26.9%

²⁰ Sportfishing magazines, followed by sportfishing television shows, are the top two sources of fishing information reported by anglers (AnglerSurvey.com, June 2008).

Table 12. If you could choose between fishing in Los Cabos or another billfish hot spot in another country, and the costs to visit both and catch rates were the same, would you be more or less likely to visit Los Cabos if you knew that:

Question:	Less Likely to Return	More Likely to Return	The Same / No Change
Only Los Cabos enforced catch-and-release fishing for billfish while the other location did not?	9.0%	68.0%	23.0%
The other location permitted commercial harvest of billfish but Los Cabos did not?	17.4%	71.4%	11.2%
The other location had stricter harvest limits on commercial and recreational billfish harvests?	41.0%	27.6%	31.4%
If you knew Los Cabos managed their fisheries to maximize sportfishing opportunities and the other location did not?	2.1%	89.6%	8.2%

A second set of questions reflects potential anglers' choices. Individuals do not have to fish in Los Cabos. Anglers can visit many other locations and countries to fish. Table 13 provides insights into how anglers may compare Los Cabos to other locations when deciding where to fish. Again, if anglers believe Los Cabos has greater protections in place for billfish than other potential destinations, they will anticipate better fishing and be more likely to return. Considering the large economic impact of money spent by each visiting angler, the long-term economic health of Los Cabos would be well served by maintaining high levels of fish stocks supported by strong fisheries conservation measures and communicating this information to U.S. and international anglers.

Los Cabos has national and international competition in the sportfishing tourism sector. Anglers have choices and can choose to fish in many other locales. Table 13 provides information on where Los Cabos anglers have also traveled to fish. A majority have fished in other regions of Mexico. Costa Rica, other Pacific destinations, and the Caribbean in general are the top competing destinations for Los Cabos and Mexico.

Table 13. In which other countries or foreign locations have you fished?

Other Locations Fished by Los Cabos Anglers	Percent Who Fished Here
Other Mexico locations	65.1%
Costa Rica	32.7%
Guatemala	7.1%
Caribbean	40.9%
Central America locations	18.6%
South America	9.4%
Europe	6.9%
Asia	5.8%
Other Pacific locations	42.9%
Other, not listed	14.8%
None	6.0%

Table 14 reveals that at present anglers are fairly satisfied with their experiences in Los Cabos, with over 62% of anglers preferring to return to Los Cabos. This relatively high degree of satisfaction is consistent with the success rates given in Table 10.

Table 14. Where Would You Fish Next Year if You Could Fish Only One Location?

Of all the locations you have fished, if you could only fish in one next year, which location would you choose?	Percent Who Prefer This Location
Caribbean	1.6%
Costa Rica	11.4%
Guatemala	1.1%
Los Cabos area	62.6%
Nowhere. I would not want to fish next year	0.5%
Other	3.6%
Other Mexico locations	8.2%
South America	2.4%
other Central America locations	4.7%
other Pacific locations	3.8%

However, as with any product, if customers think quality has diminished, they may select another fishing destination for future fishing trips. It is interesting to note that the survey of Los Cabos anglers revealed that on a scale of 1 (low) to 5 (high), 90.2% ranked quality of fishing as a 5 when asked how strongly that factor influenced the selection of their travel destinations. The same group rated actual fishing quality after their trips to Los Cabos, with 51.9% giving a 5 and 28.3% giving a 4 (Appendix D, “Online Survey of Anglers Who Fished in Los Cabos, and Results”). Given the success rates previously discussed, we take this rating of their fishing experience in Los Cabos as an indication of the high demand traveling anglers place on good-quality fishing experiences. This may be an early warning that dissatisfaction is developing among experienced Los Cabos anglers.

U.S. Anglers Never Traveling to Los Cabos, Results

To assess the potential market in the U.S. for anglers who have not yet , but could in the future, visit Los Cabos, we surveyed U.S. anglers who have fished anywhere outside of the U.S. at some point in the past. This sample was asked to identify their most recent fishing destination (Table 15). Only 25% reported that their most recent trip was to fish Mexico’s saltwater fisheries. This indicates that the potential for growth in sportfishing tourism in Los Cabos and Mexico may be large. Los Cabos could benefit from increased tourism if the message of general satisfaction with fishing experiences could be successfully relayed to the segment of the U.S. market that has not visited Los Cabos.

Table 15. Most Recent International Fishing Destination

Most Recent International Fishing Destination	Percent
Venezuela	2%
Australia/New Zealand	1%
Bahamas	3%
Brazil	0.2%
Canada	37%
Caribbean islands	8%
Costa Rica	5%
Europe	4%
Mexico, freshwater	3%
Mexico, saltwater	25%
Other	5%
Other Central American countries	2%
Pacific islands (except Hawaii)	0.5%
Panama	3%
South America, other	0.5%

These same anglers were asked where they would prefer to fish next year, if the opportunity existed to visit any of the four destinations listed in Table 16.

Table 16. Of the following locations, which one would you prefer to fish if you had a choice?

Preferred Destination:	Percent
Bimini, Bahamas	10%
Cabo San Lucas, Mexico	23%
Golfo de Papagayo, Costa Rica	23%
South Florida	25%
No preference/not sure	19%

The U.S. anglers surveyed exhibited a marginal preference for South Florida over Costa Rica and Los Cabos. We also asked these anglers for the reasons why they chose their preferred destination, and the results are shown in Table 17.

Table 17. What was the most important factor in your choice of future fishing destination?

Cost of travel	8%
I have friends there or other reasons to travel there	13%
I would feel more comfortable and more secure there	5%
Less hassle to get there and fish there	16%
My preferred destination has stronger conservation laws and practices	2%
Other	19%
The fishing is better there	37%

Quality of fishing was clearly the dominant motivator for selecting a destination. Anglers respond to the results of good conservation practices—a better opportunity to catch fish.

Overall, the results show that liberalizing commercial harvest policies has a very strong negative impact on anglers’ decision to travel to a fishing destination. Most responding anglers reported having fished in Los Cabos more than once, and almost two-thirds would prefer to come back to Los Cabos. However, many Los Cabos anglers have fished other destinations, and declines in the quality of fishing (i.e., in the numbers and sizes of fish encountered in Los Cabos) could result in a shift in destination preference. Maintaining a strong sportfishing-based economy in the region depends on U.S. anglers maintaining a perception that Los Cabos provides the best opportunity to catch quality fish. This perception is maintained by enforcing strong conservation policies and communicating this, along with reports of quality catches, through sportfishing magazines and television in the U.S. If this is done properly, Los Cabos should continue to enjoy a steady and perhaps growing stream of anglers.

Overall Satisfaction with Los Cabos

Table 18 lists the overall satisfaction reported by the three types of Los Cabos anglers surveyed as part of this project: anglers, hotel guests and timeshare owners. In general, the results are very similar for all three visitor groups. However, anglers show a slightly greater rate of dissatisfaction, perhaps a reflection of their critical demand for quality fishing experiences.

Table 18. On a scale of 1 (very dissatisfied) to 5 (very satisfied) how satisfied were you overall with your most recent trip to the Los Cabos area?

Rating	Los Cabos Anglers	Hotel Guests	Timeshare Guests
1 (very dissatisfied)	1.5%	0.4%	0.9%
2 (somewhat dissatisfied)	4.5%	2.1%	2.0%
3 (neutral)	13.7%	13.5%	10.8%
4 (somewhat satisfied)	45.9%	49.6%	43.6%
5 (very satisfied)	34.4%	34.0%	42.4%

Implications for the Future

Eighty-eight percent of international anglers who have fished in Cabo said they would be less likely to return if they knew commercial harvest of billfish increased, and 85% said they would be more likely to return if commercial harvest of billfish was restricted or stopped completely. While nearly 83% of the anglers who targeted marlin on their trip to Los Cabos were successful in catching at least one of the marlin species available, only 62% of the angling visitors said that they would choose to return to Los Cabos for another fishing trip. We believe this reflects the high demand placed on quality of the fishing experience, taking into account size and number of fish encountered, among other factors, and the highly competitive nature of the international sportfishing tourism market. Additionally, anglers are reporting a slightly lower rate of satisfaction with their visits to Los Cabos when compared to general hotel and timeshare guests.

For Los Cabos, the market of U.S. anglers who have traveled internationally lies largely untapped, with only 25% of this group having already visited the area. Maintaining current income streams from sportfishing tourism in the Los Cabos region will clearly depend on maintaining or improving on the current level of fishing success, as well as generating an opinion of high-quality fishing in Los Cabos among U.S. anglers. Growth in the same sector would depend on increasing sportfish—especially billfish—populations to increase fishing success rates, developing fisheries policies that promote conservation and sportfishing opportunities, and ensuring that U.S. anglers know of the quality fisheries and high level of fisheries conservation practiced in Baja California Sur and Mexico.

If Mexico desires to maintain or maximize the wealth provided by sportfishing tourism, intelligent decisions regarding conservation-based fisheries management will be necessary. Communicating these policies and the quality of the region's fisheries to U.S. and international anglers is critical to continued or increased sportfishing tourism activity. This report provides some of the information needed to make such informed decisions in developing fisheries policy for Mexico's future.

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Authors' note: References used in the development of the economic model are presented at the end of Appendix H.

Appendix A: Survey of the Los Cabos Business Community

To protect marlin and other fish that have brought millions of dollars into the Baja California Sur (BCS) economy and stimulated a strong tourism economy, commercial fishing has been limited by the use of no-fishing zones and other conservation measures. However, commercial fishing for the important recreational fish continues and threatens to send tourists to other countries. The BCS economy depends in part upon healthy recreational fisheries. This project will measure and report the jobs, tax revenues, and other economic contributions from sportfishing. The results will be used to demonstrate to government the importance of recreational fishing to our economy. Your response to this survey is important to help us understand how tourist dollars move through the economy, supporting jobs and other important benefits for every business reached. Your response will remain fully confidential with the economists hired to conduct this project. No one at The Billfish Foundation, in government, or within any business association in BCS or elsewhere will see your completed survey. This survey does *not* ask you to report how many pesos or dollars you or your business has earned or spent. In addition, this project will conduct a marketing study to identify what attracts anglers to BCS, how more could be attracted to the area, and what currently prevents others from visiting BCS. *Only those companies who return a completed a survey will be able to receive the results of the marketing study.* If you have questions about the survey, please contact _____.

To help us explain to government officials the types of businesses benefiting from U.S. anglers and how their money moves through the economy, we ask the following questions:

1) Is your company a:

local business, or

part of a larger company headquartered outside of BCS

2) Does your business directly serve:

American sportfishermen? Yes No

American tourists who do not fish (or if you do not know if they fish) Yes No

Please describe how dependent your business is on tourist activity:

Very dependent (we would not survive without them)

Somewhat dependent

Not very dependent on tourist activity

Not at all dependent on tourist activity

Please describe how dependent your business is on sportfishermen:

Very dependent (we would not survive without them)

Somewhat dependent

Not very dependent on sportfishing activity

__ Not at all dependent on sportfishing activity

3) Please tell us if your company receives sales and revenues from any of the types of businesses listed below:

3a. Sportfishing charter business: ___ %

Considering all of your business from sportfishing charter companies, please report the percentage that came from companies within BCS: ___ %

3b. Restaurant: ___ %

Considering all of your business from restaurants, please report the percentage that came from companies within BCS: ___ %

3c. Hotel, lodging: ___ %

Considering all of your business from hotels and lodging companies, please report the percentage that came from companies within BCS: ___ %

3d. Retailers (sportfishing-related retailers and any other type of retailer): ___ %

Considering all of your business from retailers, please report the percentage that came from companies within BCS: ___ %

3e. Wholesaler: ___ %

Considering all of your business from wholesalers, please report the percentage that came from companies within BCS: ___ %

3f. Manufacturer: ___ %

Considering all of your business from manufacturers, please report the percentage that came from companies within BCS: ___ %

3g. Service companies: ___ %

Considering all of your business from service companies, please report i) the percentage that came from companies within BCS: ___ %, and

3h. Professional companies (accountants, attorneys, architects): ___ %

Considering all of your business from professional companies, please report the percentage that came from companies within BCS: ___ %

3i. Other (please define): ___ %

Considering all of your business from other companies, please report the percentage that came from companies within BCS: ___ %

To help elected officials understand how pesos and dollars from U.S. anglers benefit many companies within BCS, we need to learn where businesses spend their money. The following questions will help us measure how many BCS companies benefit from each peso and dollar spent by U.S. anglers.

- 4) During the past 2 years, from all your cash outlays, what percentages were spent on?
- High value added / Capital goods ___%
 - Low value added / Consumables ___%
 - What percentage of your company’s labor cost is skilled and unskilled (A person who operates a boat or works with customers in English is considered skilled.):
 - Skilled: _____%
 - Unskilled: _____%
 - TOTAL: 100%
 - Your company is intensive in:
 - Capital goods: ___very; ___mildly; ___not the case.
 - Consumer goods and labor: ___very; ___mildly; ___not the case.
- 5) What is your opinion regarding flexibility of supply in BCS for your key supplies?
- ___ Local availability allows changes of scale with ease.
 - ___ They are scarce and tend to affect cost structure.
 - ___ Some items are available locally and some items are scarce
- 6) For every \$100 your company receives, how much does your company spend for:
- Wages, salaries, labor, your take-home pay, and company profit: \$_____
 - Taxes to local, state, and national government, plus permits, licenses, etc: \$_____ (this question is very important for us to communicate to elected officials how important sportfishing is to them).
 - All other expenses to run your company such as inventory, supplies, maintenance, and services such as computers and support, accountants and attorneys, etc.
- 7) Considering *all* of your annual business purchases of goods and expenses in the past year, please report the percentage that goes to each type of business listed below. For each type of business, please estimate the percentage that goes to businesses within BCS.

Expenses other than wages and salaries:

7a. Retailers (sportfishing-related retailers and any other type of retailer): ___ %

Considering all of your payments to retailers, please report the percentage paid to BCS retailers: ___ %

7b. Wholesalers: ___ %

Considering all of your payments to wholesalers, please report the percentage paid to BCS companies: ___ %

7c. Manufacturers: ___ %

Considering all of your payments to manufacturers, please report the percentage paid to BCS companies: ___ %

7d. Service companies: ___ %

Considering all of your payments to service companies, please report the percentage paid to BCS companies: ___ %

7e. Professional companies (accountants, attorneys, architects): ___ %

Considering all of your payments to professional companies, please report the percentage paid to BCS companies: ___ %

7f. Others (please define): ___ %

Considering all of your payments to other companies, please report the percentage paid to BCS companies: ___ %

8) Considering all purchases you made in the past 12 months, please report the percentage that were negotiated with sales representatives located outside of BCS.

_____ % of my sales contacts were located outside of BCS

9) Please note that all responses you provide will be kept confidential. Considering the typical business expenditures of hospitality businesses of your size (annual labor, operating expenses, capital costs, overhead, etc.), how much are these costs *typically* marked up by the average business of your size? For example, if it costs \$20 to house a guest for one night, and you sell it for \$30, that would be a 50% mark-up.

_____ % mark-up

Elected officials are concerned about jobs. To help us measure the number of jobs supported by anglers, please answer the following questions.

10) If your company's annual business revenues and sales increased by \$100,000:

- How many additional skilled employees would you have to hire? _____
- How many additional unskilled employees would you have to hire? _____

Appendix B: Survey of Los Cabos Hotel Managers

To help us explain to government officials the types of businesses benefiting from U.S. anglers and how their money moves through the economy, we ask the following questions:

- 1) Is your company a:
 - independent business
 - part of a chain located wholly in BCS, or
 - part of a larger company headquartered outside of BCS
- 2) Please mark where you are located:
 - Los Cabos
 - East Cape
 - San Jose del Cabo
 - Other

To help understand how expenditures by lodging companies benefit the regional economy, we need to learn where businesses spend their money. The following questions will help us measure how funds move through the regional economy. Results from this survey will be combined with results from a similar survey of other regional businesses (wholesalers, restaurants, charter fleets, etc).

- 3) During the past 2 years, from all your cash outlays, what percentages were spent on?
 - High value added /Capital goods (items that last more than one year) ___%
 - Low value added / Consumables ___%
 - What percentage of your company's labor cost is skilled and unskilled (A person who operates a boat or works with customers in English are considered skilled.):
 - Skilled: ___% (requires two or more years of training or college)
 - Unskilled: ___% (housekeeping, groundskeeping, etc.)

TOTAL: 100%

- 4) What is your opinion regarding flexibility of supply in BCS for your key supplies?
 - Local availability allows changes of scale with ease.
 - They are scarce and tend to affect cost structure.
 - Some items are available locally and some items are scarce

- 5) For every \$100 your company receives, how much does your company spend for:

- Wages, salaries, labor, and company profit that remains in the region:
\$ _____
 - Taxes to national government, plus any federal permits, licenses, etc: \$ _____
 - Taxes to local and state government, plus permits, licenses, etc: \$ _____
 - All other expenses to run your company, such as inventory, supplies, maintenance, and services such as computers and support, accountants and attorneys, etc. \$ _____
- 6) Considering *all* of your annual business purchases of goods and expenses in the past year, please estimate as best as possible the percentage that goes to each type of business listed below. For each type of business, please estimate the percentage that goes to businesses within BCS.

Expenses other than wages and salaries:

6a. Retailers (sportfishing-related retailers and any other type of retailer): ___ %

Considering all of your payments to retailers, please report the percentage paid to BCS retailers: ___ %

6b. Wholesalers: ___ %

Considering all of your payments to wholesalers, please report the percentage paid to BCS companies: ___ %

6c. Manufacturers: ___ %

Considering all of your payments to manufacturers, please report the percentage paid to BCS companies: ___ %

6d. Service companies: ___ %

Considering all of your payments to service companies, please report the percentage paid to BCS companies: ___ %

6e. Professional companies (accountants, attorneys, architects): ___ %

Considering all of your payments to professional companies, please report the percentage paid to BCS companies: ___ %

6f. Others (please define): ___ %

Considering all of your payments to other companies, please report the percentage paid to BCS companies: ___ %

- 7) Considering all purchases you made in the past 12 months, please estimate the percentage that were negotiated with sales representatives located outside of BCS?

_____ % of my sales contacts were located outside of BCS

- 8) Please note that all responses you provide will be kept confidential. Considering the typical business expenditures of hospitality businesses of your size (annual labor, operating expenses, capital costs, overhead, etc.), how much are these costs *typically* marked up by the average business of your size? For example, if it costs \$20 to house a guest for one night, and you sell it for \$30, that would be a 50% mark-up.

_____ % mark-up

Elected officials are concerned about jobs. To help us measure the number of jobs supported by anglers, please answer the following questions.

- 9) If your company's annual business revenues and sales increased by US\$1,000,000:
- How many additional skilled and unskilled employees would you have to hire?

 - How many additional unskilled employees would you have to hire? _____

Appendix C: Survey of Charter Fleet Owners



CHARTER BOAT OWNER SURVEY

Commercial fishing for important recreational fish threatens sportfishing. This project will measure and report the jobs, tax revenues, and other economic contributions from sportfishing. The results will be used to demonstrate to government the importance of sportfishing to our economy. Your response to this survey is important. Similar surveys are being sent to other sectors of the BCS business community. Responses from boat owners will remain confidential with the economists hired to conduct this project. We do not need to know your name or that of the business you represent. This survey does *not* ask you to report how many pesos or dollars you or your business has earned or spent. In addition, this project will conduct a marketing study to help attract more anglers to BCS.

To help us explain to government officials the types of businesses benefiting from U.S. anglers and how their money moves through the economy, we ask the following questions:

To help elected officials understand how pesos and dollars from U.S. anglers benefit many companies within BCS, we need to learn where businesses spend their money. The following questions will help us measure how many BCS companies benefit from each peso and dollar spent by U.S. anglers.

- 1) During the past 2 years, from all your cash outlays, what percentages were spent on?
 - High value added / Capital goods ___% (boats and items lasting more than 1 year)
 - Low value added / Consumables ___% (fuel, fees, etc.)
 - What percentage of your company's labor cost is skilled and unskilled (A person who operates a boat or works with customers in English is considered skilled):
 - Skilled: ___% (captains, mechanics, managerial, etc.)
 - Unskilled: ___% (mates, cleaning, etc.)

TOTAL: 100%
- 2) For every \$100 your company receives, how much does your company spend for:
 - Wages, salaries, labor, your take-home pay, and company profit: \$ _____
 - Taxes to local and state government, plus permits, licenses, etc: \$ _____
 - Taxes to national government, plus any federal permits, licenses, etc: \$ _____

- All other expenses to run your company, such as inventory, supplies, maintenance, and services such as computers and support, accountants and attorneys, etc. \$_____
- 3) Considering *all* of your annual business purchases of goods and expenses in the past year, please report the percentage that goes to each type of business listed below. For each type of business, please estimate the percentage that goes to businesses within BCS.

Expenses other than wages and salaries:

7a. Retailers (sportfishing-related retailers and any other type of retailer): ___%

Considering all of your payments to retailers, please report the percentage paid to BCS retailers: ___%

7b. Wholesalers: ___%

Considering all of your payments to wholesalers, please report the percentage paid to BCS companies: ___%

7c. Manufacturers: ___%

Considering all of your payments to manufacturers, please report the percentage paid to BCS companies: ___%

7d. Service companies (including other charter boats): ___%

Considering all of your payments to service companies, please report the percentage paid to BCS companies: ___%

7e. Professional companies (accountants, attorneys, architects): ___%

Considering all of your payments to professional companies, please report the percentage paid to BCS companies: ___%

7f. Others (please define): ___%

Considering all of your payments to other companies, please report the percentage paid to BCS companies: ___%

- 4) Considering all purchases you made in the past 12 months, please report the percentage that were negotiated with sales representatives located outside of BCS?

_____ % of my sales contacts were located outside of BCS

- 5) Please note that all responses you provide will be kept confidential. Considering the typical business expenditures of charter companies of your size (annual labor, operating expenses, capital costs, overhead, etc.), how much are these costs *typically* marked up by the average business of your size? For example, if it costs \$20 to provide your service, and you sell it for \$30, that would be a 50% mark-up.

_____ % mark-up

Elected officials are concerned about jobs. To help us measure the number of jobs supported by anglers, please answer the following questions.

- 6) If your company's annual business revenues and sales increased by \$200,000:
- How many additional skilled employees would you have to hire? _____
 - How many additional unskilled employees would you have to hire? _____
- 7) Where do you acquire your basic inputs?
- Baits, ice, fuel: __ from BCS businesses
 __ from companies outside of BCS
 - Maintenance: minor, overhauling __ from BCS businesses
 __ from outside of BCS
 - Fishing gear: __ from BCS businesses
 __ from companies outside of BCS

Appendix D: Online Survey of Anglers Who Fished in Los Cabos, and Results

Los Cabos Survey

You have received this e-mail based on your past fishing trips to Mexico. The questions in this survey are designed to help The Billfish Foundation® demonstrate the importance of fisheries conservation. This survey will only take a few minutes.

Thank you in advance for your contribution to this study, and best of success in your future fishing efforts!

For further information on this survey, please contact pat@southwickassociates.com

Southwick Associates Inc.
www.southwickassociates.com

The first set of questions concern conservation issues:

Would you be more or less likely to return to Los Cabos if you knew:

A. Commercial harvest of billfish recently began or increased since your last visit?

Q900	Frequency	Percent	Cumulative Frequency
Less likely to visit	537	87.6	537
More likely to visit	7	1.1	544
The same/no change	69	11.3	613

Frequency Missing = 21

B. Commercial harvest of billfish in Los Cabos was recently restricted or stopped completely, even outside of the 50-mile exclusion zone?

Q905	Frequency	Percent	Cumulative Frequency
Less likely to visit	26	4.3	26
More likely to visit	516	84.5	542
The same/no change	69	11.3	611

Frequency Missing = 23

C. Bag limits for billfish were tighter (meaning even more would be released than currently)?

Q910	Frequency	Percent	Cumulative Frequency
Less likely to visit	14	2.3	14
More likely to visit	431	70.3	445
The same/no change	168	27.4	613

Frequency Missing = 21

D. Bag limits for billfish were looser (meaning you can keep more billfish than before)?

Q915	Frequency	Percent	Cumulative Frequency
Less likely to visit	429	70.0	429
More likely to visit	19	3.1	448
The same/no change	165	26.9	613

Frequency Missing = 21

If you could choose between fishing in Los Cabos or another billfish hot spot in another country, and the costs to visit both and catch rates were the same, would you be more or less likely to visit Los Cabos if you knew that:

E. Only Los Cabos enforced catch-and-release fishing for billfish while the other location did not?

Q920	Frequency	Percent	Cumulative Frequency
Less likely to visit	55	9.0	55
More likely to visit	414	68.0	469
The same/no change	140	23.0	609

Frequency Missing = 25

F. The other location permitted commercial harvest of billfish but Los Cabos did not?

Q925	Frequency	Percent	Cumulative Frequency
Less likely to visit	106	17.4	106
More likely to visit	435	71.4	541
The same/no change	68	11.2	609

Frequency Missing = 25

G. The other location had stricter harvest limits on commercial and recreational billfish harvests?

Q930	Frequency	Percent	Cumulative Frequency
Less likely to visit	249	41.0	249
More likely to visit	168	27.6	417
The same/no change	191	31.4	608

Frequency Missing = 26

H. If you knew Los Cabos managed the fisheries to maximize sportfishing opportunities and the other location did not?

Q935	Frequenc y	Percent	Cumulative Frequency
Less likely to visit	13	2.1	13
More likely to visit	545	89.6	558
The same/no change	50	8.2	608

Frequency Missing = 26

Please mark when you made your *most recent* trip to the Los Cabo area. The Los Cabos area includes the towns of Cabo San Lucas, San Jose del Cabo, the corridor (between Cabo San Lucas and San Jose del Cabo), and the East Cape area.

I last visited the Los Cabos Area in:

Including your last trip, how many times have you visited the Los Cabos area?

Q1010	Frequenc y	Percent	Cumulative Frequency
1	29	4.8	29
2-3	92	15.1	412
4-5	74	12.2	486
5-10	123	20.2	609
10+	291	47.8	320

Frequency Missing = 25

How many times have you fished in the Los Cabos region of Mexico?

Q1015	Frequenc y	Percent	Cumulative Frequency
1	23	3.8	23
2-3	94	15.5	439
4-5	62	10.2	501
5-10	107	17.6	608
10+	322	53.0	345

Frequency Missing = 26

Thinking of your *most recent* Los Cabos fishing trip, please answer the following questions:

Please indicate who traveled with you to Los Cabos.

4.1% alone

39.3% spouse

23.7% kids (*If yes, then ask:*)

How many kids? # of kids mean=0.4 median=0 max=0 max=6

22.0% other family members (parents and other relatives) (*If yes, then ask:*)
 How many family members? mean=0.5 median=0 max=0 max=25
 6.2% romantic partner
 57.3% other friends, coworkers (*If yes, then ask:*)
 How many friends or coworkers? Mean=2.6 median=0 min=0 max=50
 3.8% Other
 Average number of people per group=3.9

How many days did you spend in the Los Cabos area during your most recent trip?
 days in Los Cabos area
 n=634 mean=8.3 median=6 min=1 max=90

Of the people who traveled with you to Cabo, how many of these actually fished with you at least once? (**Outlier removed.**)
 n=632 mean=4.5 median=3 min=0 max=50

On your most recent trip, how many days did you fish?
 n=611 mean=4.8 median=3 min=1 max=90

As best you can recall, how much was the nightly rate for the hotel room or other lodging you used on your last Cabo trip?

Q1078	Frequency	Percent	Cumulative Frequency
\$1-\$99/night	23	13.4	23
\$100-\$149/night	51	29.7	74
\$150-\$199/night	30	17.4	104
\$200-\$299/night	16	9.3	120
\$300-\$399/night	7	4.1	127
\$400-\$499/night	4	2.3	131
\$500 and higher	1	0.6	132
I did not use a hotel, but used timeshare or other lodging instead.	34	19.8	166
I don't know (room provided by another, etc.)	6	3.5	172

Frequency Missing = 462

Thinking of your *most recent* Los Cabos fishing trip, please answer the following questions:
 Please indicate all modes of fishing you used during your most recent Los Cabos trip:

93.2% fished from a boat
 # of days fished from a boat n=633 mean=4.6 median=3 min=0 max=200
 19.6% fished from beach/shore/seawall
 # of days fished from a beach n=633 mean=0.8 median=0 min=0 max=50
 1.1% other: please specify:
 # of days fished "other" n=634 mean=0.0 median=0 min=0 max=6

Please mark which species you expected to catch when you were planning your most recent trip to the Los Cabos area:

N of respondents = 613	N	Percent	Percent of Cases
Species expected - Marlin	550	19.9%	89.7%
Species expected - Sailfish	325	11.8%	53.0%
Species expected - Dorado (mahi-mahi, dolphin)	582	21.1%	94.9%
Species expected - Tuna	531	19.2%	86.6%
Species expected - Wahoo	288	10.4%	47.0%
Species expected - Sierra mackerel	69	2.5%	11.3%
Species expected - Roosterfish	225	8.1%	36.7%
Species expected - Yellowtail	97	3.5%	15.8%
Species expected - Bottom fish	89	3.2%	14.5%
Species expected - Robalo (snook)	3	.1%	.5%
Species expected - Didn't catch any	1	.0%	.2%
Species expected - Don't know	2	.1%	.3%
Total	2762	100.0%	450.6%

Please mark which species you actually caught on your most recent Los Cabos sportfishing trip:

N of respondents = 612	N	Percent	Percent of Cases
Species actual - No fish caught	8	.4%	1.3%
Species actual - Marlin	452	23.9%	73.9%
Species actual - Sailfish	166	8.8%	27.1%
Species actual - Dorado (mahi-mahi, dolphin)	474	25.1%	77.5%
Species actual - Tuna	400	21.2%	65.4%
Species actual - Wahoo	87	4.6%	14.2%
Species actual - Sierra mackerel	58	3.1%	9.5%
Species actual - Roosterfish	114	6.0%	18.6%
Species actual - Yellowtail	46	2.4%	7.5%
Species actual - Bottom fish	81	4.3%	13.2%
Species actual - Robalo, snook	2	.1%	.3%
Species actual - Don't recall species	2	.1%	.3%
Total	1890	100.0%	308.8%

Please mark which port your fishing trip departed from: (Frequency Missing = 22)

Q1242	Frequency	Percent	Cumulative Frequency
Cabo San Lucas	184	30.07	184
Corridor between Los Cabos and San Jose del Cabo	9	1.47	193
East Cape	383	62.58	576
I don't recall the name of the town or port	1	0.16	577
Other	14	2.29	591
San Jose del Cabo	21	3.43	612

The next questions inquire about how much you spent on your most recent trip to Los Cabos during which you fished. Please report all expenditures in U.S. dollars.

As you best recall, please estimate expenditures you made *in the U.S.* prior to departing on your fishing trip to the Los Cabos area. If you did not purchase one or more of the following items, please leave the box blank. (Outliers removed, expenditures common to groups divided by 3.9 based on the average travel party reported earlier.)

Variable	N	Mean	Median	Minimum	Maximum (response not adjusted to account for travel party size)
Package trips or tours:	633	163.06	0	0	15,000
Airfare (commercial airlines, not including air taxis to your fishing site):	628	171.13	128.53	0	4,000
Charter boats paid for in the U.S. or outside of Mexico	634	140.49	0	0	36,000
Other travel-related purchases made prior to departing home. Please specify:	633	68.41	0	0	20,000

Do you recall buying a fishing license?

Q1310	Frequency	Percent	Cumulative Frequency	Cumulative Percent
I did not need a license	57	9.33	57	9.33
I don't know/don't remember	58	9.49	115	18.82
No, I do not recall buying a license	71	11.62	186	30.44
Yes, I bought it myself.	178	29.13	364	59.57
Yes, the fishing charter company provided me with one	247	40.43	611	100

Frequency Missing = 23

Please estimate the number of licenses you obtained in the Los Cabos area over the past 12 months:

N=627 mean=4.4 median=1 min=0 max=1,000

As you best recall, please estimate your expenditures in Mexico during your most recent Los Cabos fishing trip. Please do not report any expenditures made in the U.S. Please report in U.S. dollars. For items you did not purchase, just leave the box blank. (Note: to convert pesos into dollars, divide the pesos by 10. For example, 100 pesos would equal 10 dollars). \$\$ In Los Cabos Area Only (Outliers removed, all expenses divided by average travel group size to arrive at per-person expenditures as survey respondents typically report group expenditures for such items.)

Variable	N	Mean	Minimum (not adjusted for number of family in group)	Maximum (not adjusted for number of family in group)
Gasoline, fuel, and oil for your vehicle and boats (rental or personal, not including charter boats)	633	\$129.96	0	20,000

Taxis, shuttle vans, etc to get to hotels, marinas, restaurants, etc.	634	\$47.68	0	2,500
Charter boat fees, fishing guides	630	\$393.42	0	14,000
Car rental (not including any fuel purchased)	634	\$38.78	0	2,500
Boat rentals	634	\$56.03	0	9,000
Marina expenses (slip fees and maintenance only. Parts and items purchased are covered in the next & final expenditure question)	629	\$38.44	0	6,000
Hotels/motels/resorts	634	\$456.67	0	80,000
Restaurants, bars, carry-out food	634	\$224.73	0	40,000
Groceries, food, liquor bought in stores (not in restaurants or bars)	634	\$87.85	0	14,400
Ice	634	\$4.94	0	400
Bait (Natural bait only, such as mackerel and bait bought at the launch of chartered trips. Please do not include lures.)	634	\$43.42	0	5,000
Gifts & souvenirs of any type	634	\$80.55	0	30,000
Entertainment (nightclubs, attractions, tours, etc.)	634	\$86.88	0	25,000
Fish processing and shipping	634	\$23.12	0	5,000
Taxidermy (only taxidermy fees paid to Mexico businesses, not U.S. taxidermists)	634	\$0.93	0	1,400
Personal items (toiletries, medicine, etc.)	634	\$10.13	0	2,000
Other (except fishing and boating equipment, which is the next question)	632	\$9.92	0	2,500

Did you visit any other parts of Mexico outside of the Los Cabos area on your most recent visit?

Q1520	Frequency	Percent	Cumulative Frequency
No	408	80.2	408
Yes	101	19.8	509

Frequency Missing = 125

Please estimate how much you spent in U.S. dollars, if any, on fishing and boating equipment during your most recent trip. (Note: to convert pesos into dollars, divide the pesos by 10. For example, 100 pesos would equal 10 dollars.)

Variable	N	Mean	Minimum	Maximum
Fishing tackle (line, leaders, lures, hooks, sinkers, etc.)	630	\$28.23	0	2,500
Boat-related purchases (engine parts, rope, anchors, fenders, etc.)	630	\$11.35	0	2,500
Fishing-related electronics not reported earlier (GPS, depth and fish finders, radios, and other electronics)	632	\$7.85	0	5,000
All other miscellaneous fishing and marine equipment (coolers, pliers, gloves, storage, outriggers, etc.)	631	\$20.42	0	10,000

Regarding the prices and fees you paid for lodging (hotels, motels, condos, timeshare, camping, etc.), were the prices:

Q1555	Frequency	Percent	Cumulative Frequency
-------	-----------	---------	----------------------

Extremely high	31	5.2	46
Moderately high	161	26.8	549
Fair	339	56.4	388
Moderately low	52	8.7	601
Extremely low	3	0.5	49
Don't know/no opinion	15	2.5	15

Frequency Missing = 33

Regarding the prices you paid for restaurants and meals, were the prices:

Q1560	Frequency	Percent	Cumulative Frequency
Extremely high	36	6.0	51
Moderately high	161	26.7	555
Fair	339	56.1	394
Moderately low	49	8.1	604
Extremely low	4	0.7	55
Don't know/no opinion	15	2.5	15

Frequency Missing = 30

Regarding the prices you paid for charter boats and other sportfishing-related expenses, were the prices:

Q1565	Frequency	Percent	Cumulative Frequency
Extremely high	27	4.5	44
Moderately high	180	30.1	555
Fair	326	54.4	375
Moderately low	44	7.4	599
Extremely low	5	0.8	49
Don't know/no opinion	17	2.8	17

Frequency Missing = 35

This set of questions will help us understand what attracts anglers to the Los Cabos area. The results will help improve local services for anglers and demonstrate to government officials how much their sportfishing industry can increase *if* proper conservation measures are in place.

How did you first hear about Los Cabos?

N of respondents = 604

	N	Percent	Percent of Cases
Travel guidebook	32	4.0%	5.3%
Magazines	114	14.3%	18.9%
Television, travel shows	40	5.0%	6.6%
Television, other types of shows	30	3.8%	5.0%
Internet, travel Web sites	31	3.9%	5.1%

Internet, other Web sites	25	3.1%	4.1%
From a friend who visited Los Cabos	392	49.0%	64.9%
From a friend who did not visit Los Cabos	10	1.3%	1.7%
A public event, such as a travel show, outdoor show, fishing show, etc.	51	6.4%	8.4%
Other	75	9.4%	12.4%
Total	800	100.0%	132.5%

Please rate how important each one of the following reasons was in your decision to visit Los Cabos. Rate each on a scale of 1 to 5, with 1 being least important and 5 being most important.

Price (overall lodging, amenities, etc)?

Q1625	Frequency	Percent	Cumulative Frequency
1	16	2.8	16
2	34	5.9	50
3	169	29.2	219
4	231	40.0	450
5	128	22.2	578

Frequency Missing = 56

Resort amenities such as spa, beaches, etc.?

Q1630	Frequency	Percent	Cumulative Frequency
1	47	8.2	47
2	85	14.8	132
3	190	33.1	322
4	172	30.0	494
5	80	13.9	574

Frequency Missing = 60

Relative peace and quiet? Frequency Missing = 54

Q1635	Frequency	Percent	Cumulative Frequency
1	19	3.3	19
2	50	8.6	69
3	146	25.2	215
4	229	39.5	444
5	136	23.5	580

Nightlife?

Q1640	Frequency	Percent	Cumulative Frequency
1	212	37.2	212
2	146	25.6	358
3	135	23.7	493
4	53	9.3	546
5	24	4.2	570

Frequency Missing = 64

Feeling of security and safety?

Q1645	Frequency	Percent	Cumulative Frequency
1	19	3.3	19
2	19	3.3	38
3	107	18.4	145
4	199	34.3	344
5	237	40.8	581

Frequency Missing = 53

Shopping

Q1650	Frequency	Percent	Cumulative Frequency
1	180	31.7	180
2	177	31.2	357
3	150	26.4	507
4	48	8.5	555
5	13	2.3	568

Frequency Missing = 66

Sportfishing?

Q1655	Frequency	Percent	Cumulative Frequency
1	1	0.2	1
3	13	2.2	14
4	44	7.5	58
5	531	90.2	589

Frequency Missing = 45

Other activities?

Q1660	Frequency	Percent	Cumulative Frequency
1	113	20.7	113
2	101	18.5	214
3	188	34.4	402
4	99	18.1	501
5	46	8.4	547

Frequency Missing = 87

Now that you have visited the Los Cabos area, please indicate how satisfied you were with each category below. If you have no opinion on the category, please mark N/A.

Price (lodging, transportation, amenities)?

Q1665	Frequency	Percent	Cumulative Frequency
1	12	2.1	12
2	48	8.2	60
3	199	34.1	259
4	237	40.6	496
5	88	15.1	584

Frequency Missing = 50

Resort amenities such as spa, beaches, etc.?

Q1670	Frequency	Percent	Cumulative Frequency
1	6	1.1	6
2	27	5.1	33
3	163	30.7	196
4	238	44.8	434
5	97	18.3	531

Frequency Missing = 103

Relative peace and quiet?

Q1675	Frequency	Percent	Cumulative Frequency
1	9	1.6	9
2	36	6.3	45
3	140	24.6	185
4	247	43.4	432
5	137	24.1	569

Frequency Missing = 65

Nightlife?

Q1680	Frequency	Percent	Cumulative Frequency
1	31	7.3	31
2	37	8.8	68
3	159	37.6	227
4	132	31.2	359
5	64	15.1	423

Frequency Missing = 211

Feeling of security and safety
NO RESULTS ARE AVAILABLE.

Shopping?

Q1695	Frequency	Percent	Cumulative Frequency
1	33	7.2	33
2	47	10.2	80
3	230	50.0	310
4	111	24.1	421
5	39	8.5	460

Frequency Missing = 174

Fishing?

Q1700	Frequency	Percent	Cumulative Frequency
1	13	2.2	13
2	21	3.6	34
3	82	14.0	116
4	165	28.3	281
5	303	51.9	584

Frequency Missing = 50

Other outdoor activities (biking, parasailing, adventure sports, etc.)?

Q1705	Frequency	Percent	Cumulative Frequency
1	25	6.1	25
2	32	7.8	57
3	159	38.9	216
4	123	30.1	339
5	70	17.1	409

Frequency Missing = 225

Please mark the answer that best describes your primary reason for selecting the Los Cabos area for your trip:

Q1715	Frequency	Percent	Cumulative Frequency
Other	13	2.2	13
Cold	12	2.0	25
New	3	0.5	28
Other nonfishing	2	0.3	30
Relax	53	8.8	83
Sportfishing	514	85.2	597
Visit friends	6	1.0	603

Frequency Missing = 31

How did you first hear about fishing in Los Cabos? Please mark the source(s) you recall providing information about fishing in Los Cabos:

N of respondents= 504	N	Percent	Percent of Cases
Fishing magazines	182	23.9%	36.1%
Nonfishing magazines	5	.7%	1.0%
Television, fishing shows	71	9.3%	14.1%
Television, nonfishing shows	3	.4%	.6%
Radio	9	1.2%	1.8%
Internet, fishing-related Web sites	65	8.5%	12.9%
Internet, non-fishing-related Web sites	3	.4%	.6%
From a friend who visited Los Cabos	315	41.4%	62.5%
From a friend who did not visit Los Cabos	9	1.2%	1.8%
A public event such as a travel show, outdoor show, fishing show, etc.	55	7.2%	10.9%
Other (see below for responses)	44	5.8%	8.7%
Total	761	100.0%	151.0%

Other Reasons Stated for Visiting Los Cabos:
All of the above, that's why I live here
Annual business trip
Blue water hunting with my spear guns for wahoo, dorado, tuna, and pargo to have my freezers full of fillets to eat for the winter, and I speared most of them in blue water, no other boats in sight.
Entertain clients
Friends' wedding
Los Cabos is not my cup of tea; Los Barriles is the best for me
Own a place
We live in Buena Vista, keep our boat in Cabo marina
Golf
Just to get away for a week with friends

How would you rate the quality of the sportfishing? In other words, please rate your sportfishing experience in terms of fish availability and opportunities to hook a fish compared to your expectations prior to fishing? (1 means very dissatisfied and 5 means very satisfied.)

Q1780	Frequency	Percent	Cumulative Frequency
1	15	2.94	15
2	51	9.98	66
3	135	26.42	201
4	212	41.49	413
5	98	19.18	511

Frequency Missing = 123

Would you recommend visiting Los Cabos to a friend who is looking for a good place to go fishing?
(1 means very dissatisfied and 5 means very satisfied.)

Q1785	Frequency	Percent	Cumulative Frequency
1	18	3.53	18
2	21	4.12	39
3	55	10.78	94
4	149	29.22	243
5	267	52.35	510

Frequency Missing = 124

Did you fish from a:
Charter boat?

Q1790	Frequency	Percent	Cumulative Frequency
FALSE	194	30.6	194
TRUE	440	69.4	634

Panga?

Q1795	Frequency	Percent	Cumulative Frequency
FALSE	500	78.86	500
TRUE	134	21.14	634

How would you rate the quality of your charter boat and crew? (1 means very dissatisfied and 5 means very satisfied.)

Q1800	Frequency	Percent	Cumulative Frequency
1	5	1.14	5
2	15	3.42	20
3	74	16.89	94
4	164	37.44	258
5	180	41.1	438

Frequency Missing = 196

How would you rate your flight or other mode of travel to Los Cabos in terms of convenience and scheduling? Use N/A if you have no opinion. (1 means very dissatisfied and 5 means very satisfied.)

Q1805	Frequency	Percent	Cumulative Frequency
1	10	1.72	10
2	24	4.12	34
3	143	24.53	177
4	301	51.63	478

5	105	18.01	583
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Frequency Missing = 51

How would you rate local transportation and the ease of getting around to different locations once you were in Los Cabos? (1 means very dissatisfied and 5 means very satisfied.)

Q1810	Frequency	Percent	Cumulative Frequency
1	17	2.98	17
2	37	6.48	54
3	157	27.5	211
4	280	49.04	491
5	80	14.01	571

Frequency Missing = 63

List all the activities you participated in while visiting Los Cabos.

N of respondents = 601

	N	Percent	Percent of Cases
Participated - sportfishing	596	22.4%	99.2%
Participated - spent time on the beach	376	14.1%	62.6%
Participated - visited nightclubs	197	7.4%	32.8%
Participated - visited neighboring towns	243	9.1%	40.4%
Participated - shopped	281	10.5%	46.8%
Participated - visited a spa/had a massage	105	3.9%	17.5%
Participated - relaxed around the room / pool	429	16.1%	71.4%
Participated - explored the town	315	11.8%	52.4%
Participated - went on a sunset cruise or other type of boat ride	59	2.2%	9.8%
Participated - other	65	2.4%	10.8%
Total	2666	100.0%	443.6%

What activities did your travel partners (family members, friends, etc.) participate in while visiting the Los Cabos area?

N of respondents = 590

	N	Percent	Percent of Cases
Partner participated - sportfishing	19	.7%	3.2%
Partner participated - spent time on the beach	537	19.9%	91.0%
Partner participated - visited nightclubs	374	13.9%	63.4%
Partner participated - visited neighboring towns	211	7.8%	35.8%
Partner participated - shopped	247	9.2%	41.9%
Partner participated - visited a spa/had a massage	338	12.5%	57.3%
Partner participated - relaxed around the room / pool	141	5.2%	23.9%
Partner participated - explored the town	421	15.6%	71.4%
Partner participated - went on a sunset cruise or other type of	313	11.6%	53.1%

boat ride			
Partner participated - other	62	2.3%	10.5%
Don't Know	34	1.3%	5.8%
Total	2697	100.0%	457.1%

Have you fished outside of the U.S. before?

Q1915	Frequency	Percent	Cumulative Frequency
No	48	8.16	48
Yes	540	91.84	588

Frequency Missing = 46

In which other countries or foreign locations have you fished?

N of respondents = 553	N	Percent	Percent of Cases
Fished in - other Mexico locations	360	26.0%	65.1%
Fished in - Costa Rica	181	13.1%	32.7%
Fished in - Guatemala	39	2.8%	7.1%
Fished in - Caribbean	226	16.3%	40.9%
Fished in - other Central American locations	103	7.4%	18.6%
Fished in - South America	52	3.8%	9.4%
Fished in - Europe	38	2.7%	6.9%
Fished in - Asia	32	2.3%	5.8%
Fished in - other Pacific locations	237	17.1%	42.9%
Fished in - other, please specify	82	5.9%	14.8%
Fished in - none	33	2.4%	6.0%
Total	1383	100.0%	250.1%

Of all the locations you have fished, if you could only fish in one next year, which location would you choose?

Q1980	Frequency	Percent	Cumulative Frequency
Caribbean	9	1.6	9
Costa Rica	63	11.4	72
Guatemala	6	1.1	78
Los Cabos area	345	62.6	423
Nowhere. I would not want to fish next year.	3	0.5	426
Other	20	3.6	446
Other Mexico locations	45	8.2	491
South America	13	2.4	504
other Central American locations	26	4.7	530
other Pacific locations	21	3.8	551

Frequency Missing = 83

Other specified

Q1985	Frequency	Percent	Cumulative Frequency
Alaska	5	9.5	2
Australia	3	9.5	4
British Columbia	2	4.8	5
EAST CAPE	1	4.8	7
Florida	1	4.8	8
Florida Keys	1	4.8	9
If longliners are allowed to keep fishing, I will travel to another location.	1	4.8	10
Kamchatka, Russia	1	4.8	11
LOS BARRILES	1	4.8	12
Panama	1	4.8	13
San Francisco/Bodega Bay/Pacific Ocean	1	4.8	14
Canada	2	4.8	20

Frequency Missing = 613

In which town or area was your hotel or other accommodation located?

Q1990	Frequency	Percent	Cumulative Frequency
Cabo San Lucas	149	24.8	149
Corridor between Los Cabos and San Jose del Cabo	25	4.2	174
East Cape	369	61.4	543
I don't recall the name of the location	2	0.3	545
Other	29	4.8	574
San Jose del Cabo	27	4.5	601

Frequency Missing = 33

Other (specified)

Q1995	Frequency	Percent	Cumulative Frequency
Cabo and East Cape	1	3.6	1
I stayed in Los Cabos first - for the girls - then off to East Cape for adventure, even though now they have a market and the road is paved in Los Barilles	1	3.6	2
I have a house in San Jose	1	3.6	3
Los Barilles	9	3.6	4
La Paz	2	7.1	6
La Ribera	1	3.6	7

Los Bariles and Cabo Pulmo	1	3.6	14
On my vessel	1	3.6	15
San Felipe	1	3.6	16
Stayed in the East Cape for fishing and in Cabo San Lucas for the nightlife.	1	3.6	17
The Marina	1	3.6	18
Both Cabo and East Cape	1	3.6	19
cabo and east cape	1	3.6	20
Home on corridor	1	3.6	21
Own home in San Jose	1	3.6	24
We stay on our boat	1	3.6	28

Frequency Missing = 606

On a scale of 1 to 5, where 1 means very dissatisfied and 5 means very satisfied, how satisfied were you overall with your most recent trip to the Los Cabos area? Use N/A if you have no opinion.

Q2000	Frequency	Percent	Cumulative Frequency
1	9	1.5	9
2	27	4.5	36
3	82	13.7	118
4	275	45.9	393
5	206	34.4	599

Frequency Missing = 35

The remaining questions will help us explain the types of services and activities different types of visitors use.

Your sex

Q2005	Frequency	Percent	Cumulative Frequency
Female	41	6.9	41
Male	554	93.1	595

Frequency Missing = 39

Please check the box that best describes your household's total income before taxes for last year.

Q2015	Frequency	Percent	Cumulative Frequency
Under 20,000	0	0	0
20,000 to 40,000	8	1.4	268
40,000 to 50,000	19	3.4	287
50,000 to 75,000	32	5.8	319
75,000 to 100,000	79	14.2	398
100,000 to 150,000	145	26.1	145
150,000 to 250,000	115	20.7	260
Over 250,000	158	28.4	556

Frequency Missing = 78

Appendix E: Survey of U.S. Anglers Who May or May Not Have Visited Los Cabos, and Results

Introduction E-mail:

The Billfish Foundation is engaged in numerous efforts to protect and conserve fisheries and sportfishing opportunities around the world. Please assist by taking approximately five to seven minutes to complete this survey. Your responses will remain fully confidential.

For further information on this survey, please contact pat@southwickassociates.com.
Southwick Associates Inc.
www.southwickassociates.com

SURVEY OF U.S. ANGLERS

This survey was presented to U.S. anglers in general, regardless if they had fished in Cabo or in other international destinations previously. Using known profiles of U.S. anglers, responses to this online survey were weighted based on each respondent's demographic characteristics to ensure the results represent U.S. anglers as well as possible.

-- Southwick Associates (survey authors)

Completed Surveys = 1,404

The Billfish Foundation is engaged in numerous efforts to protect and conserve fisheries and sportfishing opportunities around the world. Please assist by taking approximately five to seven minutes to complete this survey. Your responses will remain fully confidential.

For further information on this survey, please contact pat@southwickassociates.com.
Southwick Associates Inc.
www.southwickassociates.com

1. Have you fished in other countries within the past five years?
 - Yes
 - No (*skip to question #5*)

Number of Observations – 1399 (99.6%)

Yes – 30% (416)

No – 70% (983)

- a. Considering only your *most recent* fishing trip in another country, please indicate the country or location you visited:
- Canada
 - Mexico, saltwater
 - Costa Rica
 - Guatemala
 - Bahamas
 - Brazil
 - Ecuador
 - Africa
 - Pacific islands (except Hawaii)
 - Europe
 - Mexico, freshwater
 - Panama
 - Other Central American countries
 - Caribbean islands
 - Venezuela
 - South America, other
 - Australia/New Zealand
 - Other, please tell us where:

Number of Observations – 418 (30%)

	Total	Percent
Venezuela	9	2%
Australia/New Zealand	5	1%
Bahamas	13	3%
Brazil	1	0.2%
Canada	153	37%
Caribbean islands	34	8%
Costa Rica	22	5%
Europe	15	4%
Mexico, freshwater	14	3%
Mexico, saltwater	105	25%
Other	22	5%
Other Central American countries	9	2%
Pacific islands (except Hawaii)	2	0.5%
Panama	12	3%
South America, other	2	0.5%
Grand Total	418	100%

Other Number of Observations – 20 (1.4%)

13	Total	Percent
Aruba	1	5%
Bermuda	1	5%
France and England	1	5%
Germany, Italy, and Norway	1	5%
Iraq while deployed	1	5%
Ireland	2	10%
Italy	1	5%
Kilwa Ruins Lodge in Tanzania and the Musandam Peninsula in Oman	1	5%
Korea	1	5%
Norway, France, and Italy	1	5%
Philippines	1	5%
Puerto Rico	1	5%
Republic of Korea	1	5%
Saudi Arabia	1	5%
Singapore	1	5%
South Korea	1	5%
St. Thomas, V.I.	1	5%
Switzerland	1	5%
U.S.A. I'm Canadian and vacation in South Carolina every year.	1	5%
Grand Total	20	100%

b. Would you have visited that location if you could not go fishing?

- Yes
- No

Number of Observations – 402 (29%)

Yes – 42% (168)

No – 58% (234)

2. Please check all species you caught or attempted to catch on your *most recent* fishing trip to another country:

- Salmon
- Trout (freshwater)
- Marlin (any species of marlin)
- Sailfish
- Other billfish (swordfish, spearfish)
- Dorado (mahi-mahi, dolphinfish)
- Tarpon
- Tuna (any species)
- Wahoo
- Sierra mackerel
- Roosterfish

- Yellowtail ○
- Bonfish ○
- Bottom fish (snapper, grouper, etc.) ○
- Robalo (snook) ○
- I don't recall the name of the species. ○
- Largemouth bass ○
- Peacock bass or rainbow bass ○
- Other, please tell us: ○

Obs = 417

Species	Total	% of respondents
Other	155	37.2%
Dorado (mahi-mahi, dolphin)	124	29.7%
Marlin (any species of marlin)	109	26.1%
Sailfish	104	24.9%
Tuna (any species)	96	23.0%
Largemouth bass	69	16.5%
Trout (freshwater)	66	15.8%
Wahoo	63	15.1%
Bottom fish (snapper, grouper, etc.)	61	14.6%
Roosterfish	45	10.8%
Salmon	36	8.6%
Other billfish (swordfish, spearfish)	35	8.4%
Yellowtail	33	7.9%
Bonfish	32	7.7%
Sierra mackerel	23	5.5%
Tarpon	19	4.6%
I do not recall the name of the species.	15	3.6%
Robalo (snook)	11	2.6%
Peacock bass or rainbow bass	10	2.4%
Grand Total	1106	
Total Respondents	417	

Other species
Obs = 151

Other species	Total	% of respondents
Walleye	78	51.7%
Northern pike	77	51.0%
Bass	48	31.8%
Perch	19	12.6%
Muskie	17	11.3%
Barracuda	9	6.0%
Carp	6	4.0%
Lake trout	6	4.0%
Crappie	5	3.3%
Catfish	4	2.6%
Bluegill	3	2.0%
Cod	3	2.0%
Shark	3	2.0%
Arctic grayling	2	1.3%
Bluefish	2	1.3%
Corvina	2	1.3%
Drum	2	1.3%
Flounder	2	1.3%
Sturgeon	2	1.3%
Sunfish	2	1.3%
White bass	2	1.3%
Barramundi	1	0.7%
Barbel	1	0.7%
Beracuda grunts	1	0.7%
Big-eye trevally	1	0.7%
Black sea bass	1	0.7%
Bluefin trevally	1	0.7%
Bonito	1	0.7%
Brown trout	1	0.7%
Chub	1	0.7%
Coal fish	1	0.7%
Croakers	1	0.7%
Fallfish	1	0.7%
Gar	1	0.7%
Giant trevally	1	0.7%
Grayling and pike	1	0.7%
Grunt	1	0.7%
Hardheads	1	0.7%
King mackerel	1	0.7%
Ling and sea trout	1	0.7%
Panfish	1	0.7%
Permit	1	0.7%
Pickrel	1	0.7%

Pollock	1	0.7%
Pompano	1	0.7%
Pumpkinseed sunfish	1	0.7%
Queenfish	1	0.7%
Rainbow runner	1	0.7%
Red drum	1	0.7%
Red snapper	1	0.7%
Redfish	1	0.7%
Roach	1	0.7%
Rock cod	1	0.7%
Romania	1	0.7%
Roosterfish	1	0.7%
Sardines	1	0.7%
Sea bass	1	0.7%
Several species of snapper and grouper	1	0.7%
Speckled trout	1	0.7%
Spotted seatrout	1	0.7%
Squid	1	0.7%
Steelhead	1	0.7%
Stripers	1	0.7%
Tiger muskie	1	0.7%
Tilapia	1	0.7%
Whiting	1	0.7%
Weakfish	1	0.7%
White fish	1	0.7%
White perch	1	0.7%
White Sturgeon in British Columbia on the Fraser River	1	0.7%
Whitefish	1	0.7%
Whiting	1	0.7%
Yellowfin	1	0.7%
Grand Total	347	
Total Respondents	151	

- c. Regarding this most recent trip to another country, considering the time and expense required to travel and visit, please rate how satisfied you were with your overall experience. Please use a scale of 1 to 10, with 1 meaning not satisfied at all and 10 meaning very satisfied:

1 2 3 4 5 6 7 8 9 10
← *Very dissatisfied* *Average* *Very Satisfied* →

Number of Observations – 409 (29.1%)

1 – 1% (4)

2 – 5% (20)

3 – 19% (77)

4 – 32% (131)

5 – 43% (177)

Mean – 4.1

Median – 4

- d. Regarding your most recent fishing trip in another country, please rate how *important* each one of the following reasons was in your selection of that country. Rate each on a scale of 1 to 5, with 1=*not a reason at all* and 5=*a major reason why I selected this country*.

Price (overall lodging, amenities, etc)? 1 2 3 4 5NC
← *Very Dissatisfied* *Very Satisfied* →

Number of Observations – 414 (29.5%)

1 – 8% (32)

2 – 7% (31)

3 – 32% (133)

4 – 30% (125)

5 – 22% (93)

Mean – 3.6

Median – 4

Resort/lodge amenities such as bars, 1 2 3 4 5NC
beaches, and nonfishing activities ← *Very Dissatisfied* *Very Satisfied* →

Number of Observations – 413 (29.4%)

1 – 4% (17)

2 – 4% (17)

3 – 11% (46)

4 – 28% (116)

5 – 53% (217)

Mean – 4.2

Median – 5

4 – 31% (129)
5 – 24% (100)

Mean – 3.5
Median – 4

Quality of fishing (Did the opportunities to catch fish meet your expectations?) 1 2 3 4 5 NC ← *Very Dissatisfied* *Very Satisfied* →

Number of Observations – 411 (29.3%)

1 – 21% (87)
2 – 7% (29)
3 – 25% (102)
4 – 26% (107)
5 – 21% (86)

Mean – 3.2
Median – 3

Other outdoor activities (biking, parasail, adventure sports, etc.) 1 2 3 4 5 NC ← *Very Dissatisfied* *Very Satisfied* →

Number of Observations – 415 (29.6%)

1 – 12% (48)
2 – 5% (21)
3 – 25% (105)
4 – 30% (126)
5 – 28% (115)

Mean – 3.6
Median – 4

2. Of the following locations, which one would you prefer to fish if you had a choice?

Number of Observations – 417 (29.7%)

	Total	Percent
Bimini, Bahamas	42	10%
Cabo San Lucas, Mexico	95	23%
Golfo de Papagayo, Costa Rica	96	23%
South Florida	106	25%
No preference/not sure	78	19%
Grand Total	417	100%

e. Please tell us why you chose X as your preferred destination:

- Cost of travel
- Less hassle to get there and fish there
- I would feel more comfortable and more secure there
- The fishing is better there
- My preferred destination has stronger conservation laws and practices
- I have friends there or other reasons to travel there
- Other, please tell us why:

Number of Observations – 410 (29.2%)

	Total	Percent
Cost of travel	33	8%
I have friends there or other reasons to travel there	53	13%
I would feel more comfortable and more secure there	21	5%
Less hassle to get there and fish there	64	16%
My preferred destination has stronger conservation laws and practices	9	2%
Other	77	19%
The fishing is better there	153	37%
Grand Total	410	100%

Other Number of Observations – 71 (5.1%)

	Total	Percent
I try to plan a trip for the Jan. or Feb. The weather usually tends to be better in that area during that time.	2	2.8%
All the above!	1	1.4%
Always wanted to fish in Costa Rica and haven't been there before.	1	1.4%
Always wanted to go there.	1	1.4%
Always wanted to go there...and there's a lot of water.	1	1.4%
Beautiful country and I think I heard it is a great place to fish.	1	1.4%
Black marlin and the quantity of marlin overall.	1	1.4%
Choices listed don't interest me.	1	1.4%
Cruise was stopping there.	1	1.4%
Exotic location.	1	1.4%
Fishing tournament with friends.	1	1.4%
Friends have fished in Cabo.	1	1.4%
Friend's recommendation.	1	1.4%
Great place to go with the spouse to get tan while I fish.	1	1.4%
Gulf Stream is nearly at the bank.	1	1.4%
Had friends recommend.	1	1.4%
Has the species I am interested in.	1	1.4%
Have done the others.		
Cost has become a factor, though.	1	1.4%
Have heard about it but haven't tried it and have tried the other choices.	1	1.4%
Have never fished any of those places. I fresh water fish.	1	1.4%
Have not been there yet.	1	1.4%
I always wanted fish in Costa Rica.	1	1.4%
I don't know what I'd be fishing for in the ocean. So I don't know.	1	1.4%
I enjoy my in-laws' hospitality at Port Isabel, Tx.	1	1.4%

I find the Bahamian islands absolutely beautiful and I want to go back there again.	1	1.4%
I fished there while attending my daughter's wedding and found the fishing excellent.	1	1.4%
I had no preference.	1	1.4%
I have heard it is a great place to fish.	1	1.4%
I have heard it was a nice place to fish and enjoy the rest of the visit too.	1	1.4%
I have never fished Costa Rica and it is on my list of places to fish.	1	1.4%
I know a person who has fished there and loved it.	1	1.4%
I was invited to a very remote cabin that belonged to a friend of my brother's. He had been there before and served as a guide.	1	1.4%
If there is water there are fish.	1	1.4%
I'll go where the fish are biting.	1	1.4%
It wouldn't have anything to do with the above...security is only an issue if it would not be safe for tourists. My reason to fish Costa Rica would be for the new and different experience in a new and different country.	1	1.4%
I've never been there.	1	1.4%
Just the chance to fish for tarpon, snook, and other fish in the area.	1	1.4%
Like to fishing so it doesn't really matter where it is.	1	1.4%
Mayan culture - rain forest - biodiversity - English speaking.	1	1.4%
More remote, better fishing, less fishing pressure, safe country, good climate, not overly developed, rain forest, exotic, etc.	1	1.4%
My job.	1	1.4%
NA	1	1.4%
Never been there.	2	2.8%
Never been there, like to try it.	1	1.4%
Never been there. Recommendations from TV, magazines.	1	1.4%
Never been there, sounds like a great place to go fish. Always like to go to new places.	1	1.4%
Nice place to visit.	1	1.4%
No choice.	1	1.4%
No preference.	2	2.8%
None.	2	2.8%
Not really interested in offshore fishing for big game fish. I prefer the inshore species.	1	1.4%
Not sure.	1	1.4%
Other reasons to travel there. Great fishing, strong conservation laws, etc.	1	1.4%
Potential to catch bigger fish there.	1	1.4%
Seemed like it would be a good place to visit.	1	1.4%
Seen many advertisements.	1	1.4%
Some place I have always wanted to visit and fish.	1	1.4%
Sounds like a cool place to go. but I would rather fish freshwater for large bass in Mexico.	1	1.4%
Sounds to me the most all-around appealing place.	1	1.4%
test test test.	1	1.4%
The time of year.	2	2.8%
Variety of fishing and other activities.	1	1.4%
While I do not know that specific location, Costa Rica would seem to have the most to offer for travel dollars spent...new location for me,	1	1.4%

great diving, rain forests, ancient culture, and great fishing. I do not make enough to travel just to fish.		
Wilderness.	1	1.4%
Would just like to go there.	1	1.4%
(Other)	1	1.4%
Grand Total	71	100%

b. Would you be more or less likely or the same/no change to return if you knew:

i. Commercial harvest of gamefish recently began or increased since your last visit?

Number of Observations – 416 (29.63%)

	Total	Percent
Less likely to visit	222	53%
More likely to visit	14	3%
The same/no change	180	43%
Grand Total	416	100%

ii. Commercial harvest of gamefish was recently restricted or stopped completely?

Number of Observations – 415 (29.56%)

	Total	Percent
Less likely to visit	28	7%
More likely to visit	218	53%
The same/no change	169	41%
Grand Total	415	100%

iii. Bag limits for gamefish were tighter (meaning even more would be released than currently)?

Number of Observations – 416 (29.63%)

	Total	Percent
Less likely to visit	29	7%
More likely to visit	136	33%
The same/no change	251	60%
Grand Total	416	100%

iv. Bag limits for gamefish were looser (meaning you can keep more fish than before)?

Number of Observations – 413 (29.4%)

	Total	Percent
Less likely to visit	90	22%
More likely to visit	31	8%
the same/no change	292	71%
Grand Total	413	100%

c. Over the next 10 years, what is the likelihood of you traveling outside of the country for the primary purpose of fishing?

Number of Observations – 1397 (99.5%)

	Total	Percent
Not likely	447	32%
Somewhat likely	368	26%
Somewhat unlikely	204	15%
Very likely	378	27%
Grand Total	1397	100%

3. Are you:

a. What is your gender?

Number of Observations – 1391 (99.1%)

	Total	Percent
Female	83	6%
Male	1308	94%
Grand Total	1391	100%

b. What is your age?

Number of Observations – 1398 (99.6%)

	Total	Percent
16	5	0.4%
17	4	0.3%
18	4	0.3%

19	1	0.1%
20	1	0.1%
21	3	0.2%
22	3	0.2%
23	10	0.7%
24	12	0.9%
25	6	0.4%
26	8	0.6%
27	17	1.2%
28	8	0.6%
29	13	0.9%
30	14	1.0%
31	13	0.9%
32	7	0.5%
33	5	0.4%
34	11	0.8%
35	15	1.1%
36	12	0.9%
37	26	1.9%
38	22	1.6%
39	15	1.1%
40	19	1.4%
41	29	2.1%
42	30	2.1%
43	39	2.8%
44	27	1.9%
45	27	1.9%
46	35	2.5%
47	48	3.4%
48	38	2.7%
49	40	2.9%
50	49	3.5%
51	44	3.1%
52	39	2.8%
53	46	3.3%
54	45	3.2%
55	59	4.2%
56	28	2.0%
57	49	3.5%
58	51	3.6%
59	36	2.6%
60	50	3.6%
61	51	3.6%
62	38	2.7%
63	28	2.0%
64	9	0.6%
65	24	1.7%
66	22	1.6%
67	17	1.2%
68	31	2.2%

69	22	1.6%
70	22	1.6%
71	15	1.1%
72	2	0.1%
73	5	0.4%
74	14	1.0%
75	13	0.9%
76	7	0.5%
77	4	0.3%
78	1	0.1%
80	4	0.3%
82	1	0.1%
83	2	0.1%
86	1	0.1%
100	2	0.1%
Grand Total	1398	100%

c. In which state is your primary residence located?

Number of Observations – 1380 (98.3%)

	Total	Percent
AL	35	2.5%
AR	57	4.1%
AZ	11	0.8%
CA	65	4.7%
Canada	7	0.5%
CO	10	0.7%
CT	24	1.7%
DC	1	0.1%
DE	12	0.9%
FL	78	5.7%
GA	25	1.8%
IA	10	0.7%
ID	2	0.1%
IL	52	3.8%
IN	31	2.2%
KS	10	0.7%
KY	10	0.7%
LA	10	0.7%
MA	26	1.9%
MD	13	0.9%
ME	7	0.5%
MI	31	2.2%
MN	29	2.1%
MO	28	2.0%
MS	8	0.6%
MT	6	0.4%
NC	28	2.0%
ND	1	0.1%

NE	4	0.3%
NH	6	0.4%
NJ	236	17.1%
NM	6	0.4%
NV	5	0.4%
NY	73	5.3%
OH	68	4.9%
OK	19	1.4%
OR	10	0.7%
PA	106	7.7%
RI	12	0.9%
SC	16	1.2%
SD	9	0.7%
TN	24	1.7%
TX	61	4.4%
UT	4	0.3%
VA	21	1.5%
VT	9	0.7%
WA	20	1.4%
WI	36	2.6%
WV	3	0.2%
WY	5	0.4%
Grand Total	1380	100%

d. What level of education have you completed?

Number of Observations – 1390 (99.0%)

	Total	Percent
Less than 11 years	30	2%
12 years (high school diploma)	361	26%
1-3 years post high school	500	36%
4-year degree	331	24%
Masters or advanced degree	168	12%
Grand Total	1390	100%

e. What is your household income?

Number of Observations – 1274 (90.7%)

	Total	Percent
Under 20,000	55	4%
20,000 to 40,000	179	14%
40,000 to 50,000	124	10%

50,000 to 75,000	270	21%
75,000 to 100,000	299	23%
100,000 to 150,000	238	19%
150,000 to 250,000	71	6%
Over 250,000	38	3%
Grand Total	1274	100%

f. Are you a member of local, state, or national conservation or fishing organization?

Number of Observations – 1361 (96.9%)

	Total	Percent
A local fishing club or organization:	280	20.6%
A local fishing club or organization: another group not listed here:	150	11.0%
A local fishing club or organization: I do not belong to any fishing organization/don't know:	1	0.1%
Another group not listed here:	309	22.7%
Another group not listed here: I do not belong to any fishing organization / don't know:	2	0.1%
Coastal Conservation Association:	16	1.2%
Coastal Conservation Association: a local fishing club or organization:	18	1.3%
Coastal Conservation Association: a local fishing club or organization: another group not listed here:	9	0.7%
Coastal Conservation Association: another group not listed here:	10	0.7%
I do not belong to any fishing organization/don't know:	529	38.9%
The Billfish Foundation:	4	0.3%
The Billfish Foundation: a local fishing club or organization:	4	0.3%
The Billfish Foundation: a local fishing club or organization: another group not listed here:	9	0.7%
The Billfish Foundation: another group not listed here:	3	0.2%
The Billfish Foundation: Coastal Conservation Association:	1	0.1%
The Billfish Foundation: Coastal Conservation Association: a local fishing club or organization:	8	0.6%
The Billfish Foundation: Coastal Conservation Association: a local fishing club or organization: another group not listed here:	6	0.4%
The Billfish Foundation: Coastal Conservation Association: a local fishing club or organization: another group not listed here: I do not belong to any fishing organization / don't know:	1	0.1%
The Billfish Foundation: Coastal Conservation Association: another group not listed here:	1	0.1%
Grand Total	1361	100%

Appendix F: Survey of Hotel and Timeshare Guests

SURVEY OF HOTEL GUESTS

Dear Valued Guest:

You have received this e-mail based on your previous trip to the Los Cabos and East Cape region, including the towns of Cabo San Lucas, San Jose del Cabo, the Corridor (between Cabo San Lucas and San Jose del Cabo), and the East Cape area.

Your completed survey is very important and will be recorded anonymously to assure confidentiality and will never be passed along to any other group or used for any marketing or advertising purpose. The results will be used to improve the visitor experience. Nonprofit groups will use the results to improve government protection of the natural features in the Los Cabos area that attract visitors. This survey has taken most people three minutes to complete. Thank you for your help!

- The questions in this survey only relate to your visits to the Los Cabos area of Mexico,
- Please mark in which time period you made your *most recent* trip to the Los Cabo area. The Los Cabos area includes includes the towns of Cabo San Lucas, San Jose del Cabo, the Corridor (between Cabo San Lucas and San Jose del Cabo), and the East Cape area.
 - I visited before June 30, 2006
 - I visited between July 1–December 31, 2006
 - I visited in 2007
 - I have not visited the Los Cabos area [*If they mark this choice, they should exit the survey and receive this note: “Thank you for participating in the survey! We appreciate your help.”*]
- In which month did your most recent trip to the Los Cabos area occur?
[SYSTEM – DROP-DOWN MENU WITH MONTH CHOICES]
- Thinking of your *most recent* Los Cabos trip, please answer the following seven questions:
 - Please indicate if anyone else traveled with you to Los Cabos
 - Spouse
 - Kids (IF YES, THEN ASK:)
How many kids? # of kids
 - Other family members (parents and other relatives) (IF YES, THEN ASK:)

- How many other family members? ___ #
- ___ Romantic partner
- ___ Other friends, coworkers (IF YES, THEN ASK:)
- How many friends or coworkers? ___ # of kids
- ___ Other

- How many days did you spend in the Cabo area on that trip?
___ # of days [*SYSTEM – NUMERIC RESPONSE ONLY*]

- Considering the information you received about Los Cabos *before* you first visited, please mark the sources where you received, read or heard about Los Cabos:

- ___ Magazines
- ___ Television, travel shows
- ___ Television, other types of shows
- ___ Internet, travel Web sites
- ___ Internet, other Web sites
- ___ From a friend who visited Los Cabos
- ___ From a friend who did not visit Los Cabos
- ___ A public event such as a travel show, outdoor show, fishing show, etc.
- ___ Other, please describe:

- Please rate how *important* each one of the following reasons were in your decision to visit Los Cabos. Rate each on a scale of 1 to 5, with 1=*least important* and 5=*most important*. Please mark “N/A” if you are unaware of the service area or have no opinion.

Price (overall lodging, amenities, etc.)? 1 2 3 4 5 N/A
 ← *Least Important* *Most Important* →

Resort amenities such as spa, beaches, etc.? 1 2 3 4 5 N/A
 ← *Least Important* *Most Important* →

Relative peace and quiet 1 2 3 4 5 N/A
 ← *Least Important* *Most Important* →

Nightlife 1 2 3 4 5 N/A
 ← *Least Important* *Most Important* →

Feeling of security and safety 1 2 3 4 5 N/A
 ← *Least Important* *Most Important* →

Outdoor activities 1 2 3 4 5 N/A
 (fishing, biking, parasail, adventure sports, etc.) ← *Least Important* *Most Important* →

- Now that you have visited Los Cabos, please provide your opinion about the area’s characteristics that added to or diminished from your trip:

Price (lodging, transportation, amenities)?
 Not important 1 2 3 4 5 N/A
 ← *Very Disappointed* *Very Satisfied* →

Resort amenities such as spa, beaches, etc?
 Not important 1 2 3 4 5 N/A
 ← *Very Disappointed* *Very Satisfied* →

Relative peace and quiet
 Not important 1 2 3 4 5 N/A
 ← *Very Disappointed* *Very Satisfied* →

Nightlife
 Not important 1 2 3 4 5 N/A
 ← *Very Disappointed* *Very Satisfied* →

Feeling of security and safety
 Not important 1 2 3 4 5 N/A
 ← *Very Disappointed* *Very Satisfied* →

Shopping
 Not important 1 2 3 4 5 N/A
 ← *Very Disappointed* *Very Satisfied* →

Sportfishing
 Not important 1 2 3 4 5 N/A
 ← *Very Disappointed* *Very Satisfied* →

Other outdoor activities
 (whale watching, diving, biking, parasail, adventure sports, etc.)
 Not important 1 2 3 4 5 N/A
 ← *Very Disappointed* *Very Satisfied* →

Please write in any other characteristic you feel is important: _____
 [ASK THIS QUESTION ONLY IF A CHARACTERISTIC IS WRITTEN IN] Please rate how
 well the Los Cabos area delivered on this characteristic:
 1 2 3 4 5 N/A
 ← *Very Disappointed* *Very Satisfied* →

- o Thinking of your expectations about Los Cabos *prior* to departing the United States, how would you rate your experience now that your trip is complete? (Please reach each topic from 1 to 5, with 1 being the lowest score possible and 5 being the highest score. Please mark “N/A” if you do not have an answer):

1. Were the flights or other forms of travel to Los Cabos convenient and adequate?

1 2 3 4 5 N/A
← Poor Average Excellent →

2. How would you rate transportation and the ease of getting around to different locations once you were in Los Cabos?

1 2 3 4 5 N/A
← Poor Average Excellent →

3. If you went sportfishing, how would you rate the quality of the sportfishing? In other words, please rate your sportfishing experience in terms of fish availability and opportunities to hook a fish compared to your expectations prior to fishing:

1 2 3 4 5 DID NOT FISH N/A
← Poor Average Excellent →

4. Would you recommend visiting Los Cabos to a friend who is looking for a good place to go fishing?

1 2 3 4 5 N/A
← Not Likely Very Likely →

5. Do you have any comments about anything that detracted from your overall experience in Los Cabos? No: ___ Yes: _____

6. Was there anything in particular that added to your experience or was particularly enjoyable about Los Cabos? No: ___ Yes: _____

○ [PRESENT THIS QUESTION ONLY IF THEY DID NOT MARK "DID NOT FISH" IN F3 ABOVE]: How many times have you fished in the Los Cabos region of Mexico?

- ___ 0, I never fished in the Los Cabos/Cabo San Lucas area
- ___ Once
- ___ 2-3
- ___ 4-5
- ___ 5-10
- ___ more than 10

○ Regarding the prices and fees you paid for lodging (hotels, motels, condos, camping, etc.) were the prices:

- ___ Extremely high
- ___ Moderately high
- ___ Fair
- ___ Moderately low
- ___ Extremely low
- ___ Don't know/no opinion

h.1) Do you have any specific comments about lodging and lodging prices in the Los Cabos area? _____

○ Regarding the prices you paid for restaurants and meals, were the prices:

- ___ Extremely high

- Moderately high
- Fair
- Moderately low
- Extremely low
- Don't know/no opinion

i.1) Do you have any specific comments about restaurants, food, and related prices in the Los Cabos area? _____

- o Please mark the answer that best describes your *primary* reason for selecting Cabo for your trip:

[SYSTEM – vary the order of presentation]

- Relax/get away
- See someplace new
- Sportfishing
- Whale watching, diving, boating, and other nonfishing water activities
- Spring break
- Honeymoon
- Visit friends
- Get away from cold weather
- Other: please specify

- o In which town or area was your hotel or other accommodations located?

- Cabo San Lucas
- East Cape
- San Jose del Cabo
- Corridor between Los Cabos and San Jose del Cabo
- Other: Please report: _____
- I don't recall the name of the location

- o On a scale of 1 to 5, where 1 means very dissatisfied and 5 means very satisfied, how satisfied were you overall with your most recent trip to the Los Cabos area?

1 2 3 4 5 N/A
 ← Poor Average Excellent →

m) While in the Los Cabos area, did you participate in a presentation about timeshare sales?

- Yes [GO TO N] No [SKIP TO O] Not sure/I do not recall [SKIP TO O]

n) Since participating in a timeshare presentation, have you invested in a timeshare in the Los Cabos area?

- Yes [GO TO N] No [SKIP TO O] Not sure/I do not recall [SKIP TO O]

- The remaining questions will help us explain the types of services and activities different types of visitors use. *[SYSTEM – ALLOW PEOPLE TO SKIP QUESTIONS]*

a) Your sex:

- I) Male

II) Female

b) In what year were you born? *[SYSTEM – PROVIDE DROP-DOWN MENU BACK TO 1907]*

c) Please check the box that best describes your household's total income before taxes for last year. *[SYSTEM – PERMIT ONE CHOICE ONLY]*

i) Less than \$20,000

ii) \$20,000–\$40,000

iii) \$40,000–\$50,000

iv) \$50,000–\$75,000

v) \$75,000–\$100,000

vi) \$100,000–\$150,000

vii) \$150,000–\$250,000

viii) More than \$250,000

- Do you have any additional comments you would like us to relay to the Los Cabos community about your recent trip and experience to the area?

Thank you for your help and participation.
We wish you the best of success in all your endeavors!

Appendix G: Survey of Private Boat Owners



SURVEY OF PRIVATE BOAT OWNERS

EC3-08

Dear Boater:

The Billfish Foundation is working with Los Cabos sportfishing businesses and conservation groups to measure the economic contributions of sportfishing and related tourism. The results will be used to explain to government officials the importance of maintaining effective conservation and fisheries policies. Your responses will be recorded anonymously to assure confidentiality and even then will never be passed along to any other group or used for any marketing or advertising purpose. Thank you for your help!

- The questions in this survey only relate to your fishing activities that took place in the Los Cabos area of Baja California Sur, Mexico. This includes the towns of Cabo San Lucas, San Jose del Cabo, the Corridor in-between, and the East Cape area.
 - In the past year, how many times have you fished in the Los Cabos region of Mexico?
 - ___ 0, I never fished in the Los Cabos area (*YOU ARE DONE. PLEASE SUBMIT YOUR SURVEY. WE STILL NEED YOUR RESPONSE*).
 - ___ Once
 - ___ 2-3
 - ___ 4-5
 - ___ 6-10
 - ___ 11-20
 - ___ More than 20

NOTE 1a: "Thank you for participating in the survey! Best of success in your future fishing efforts."
 - How many days a year do you personally spend in Los Cabos?
 - ___ I live here year-round
 - ___ 1-7
 - ___ 8-14
 - ___ 15-21
 - ___ 22-28
 - ___ 29-100

___ More than 100

- Thinking of your *typical* Los Cabos visit, who typically is in your group:

___ Spouse

___ Kids (IF YES, THEN ASK:) How many kids? ___ # of kids

___ Other family members (parents and other relatives) (IF YES, THEN ASK:)
How many other family members? ___ #

___ Romantic partner

___ Other friends, co-workers. How many friends or coworkers? ___ #

___ Clients. How many clients? _____ #

___ Other. How many? _____ #

- On your most recent trip to Los Cabos, how many days did you spend in the Los Cabos area?

___ # of days in Mexico

- On your most recent trip, on how many days did you fish?

___ # of days fished on most recent trip to Mexico

- Please mark which species you caught on your most recent Los Cabos sportfishing trip:

No fish were caught	○
Marlin (any species of marlin)	○
Sailfish	○
Dorado (mahi-mahi, dolphinfish)	○
Tuna (any species)	○
Wahoo	○
Sierra mackerel	○
Roosterfish	○
Yellowtail	○
Bottom fish (snapper, grouper)	○
Robalo (snook)	○
I don't recall the name of the species caught	○
I don't remember if fish were caught or not	○

- Please mark which species you actually planned to catch *before* departing on your most recent Los Cabos sportfishing trip:

- Marlin (any species of marlin)
- Sailfish
- Dorado (mahi-mahi, dolphinfish)
- Tuna (any species)
- Wahoo
- Sierra mackerel
- Roosterfish
- Yellowtail
- Bottom fish (snapper, grouper)
- Robalo (snook)
- I don't recall the name of the species caught
- I don't remember if fish were caught or not

- The next five questions inquire about how much you spent on your most recent trip to Los Cabos in which you fished, regardless of the number of days. Please report all expenditures in U.S. dollars. (If you need to convert pesos into dollars, divide the pesos by 10. For example, 100 pesos would equal 10 dollars.)
 - Please report expenditures you made prior to departing on your fishing trip (expenditures made from home). If you did not purchase one or more of the following items, please leave the box blank.

Package trips or tours	\$
Airfare (commercial airlines, not including air taxis to your fishing site)	\$
Charter boats paid for in the U.S. or outside of Mexico	\$
Other travel-related purchases made prior to departing home. Please specify	\$

- Do you recall buying a fishing license?
 - ___ No, I do not recall buying a license
 - ___ Yes, I had a fishing license.
 - If you bought a license, please estimate the number of licenses you obtained in the Los Cabos area over the past 12 months: _____ # of licenses
 - ___ I did not need a license
 - ___ I do not recall/don't know
- Please estimate *as best as possible* the expenditures made *in Mexico* during your most recent trip to the Los Cabos area in which you fished. Please do not include any expenditures reported in the table above. Please report in U.S. dollars.

Item	In Los Cabos area	In Other Parts of Mexico
Gasoline, fuel, and oil for your vehicle and boats (rental or personal, not including charter boats)	\$	\$
Taxis, shuttle vans, etc. to get to hotels, marinas, restaurants, etc.	\$	\$
Charter boat fees, fishing guides	\$	\$
Car rental (not including any fuel purchased)	\$	\$
Boat rentals	\$	\$
Marina expenses (Slip fees and maintenance only. Parts and items purchased are covered in the next and final expenditure question.)		
Lodging: please report the type of lodging used and the cost:		
Hotels/motels/resorts	\$	\$
Timeshare (Please report only the cost associated with your trip and not any part of the purchase price.)	\$	\$
Campgrounds	\$	\$
Other (please specify)	\$	\$
Restaurants, bars, carry-out food	\$	\$
Groceries, food, liquor bought in stores (not in restaurants or bars)	\$	\$
Ice	\$	\$
Bait (Natural bait only, such as mackerel and bait bought at the launch for chartered trips. Please do not include lures.)	\$	\$
Gifts and souvenirs of any type	\$	\$
Park, entertainment, and amusement admission fees	\$	\$
Fish processing and shipping:	\$	\$
Taxidermy (only taxidermy fees paid to Mexico businesses, not U.S. taxidermists)		
Personal items (toiletries, medicine, etc.)	\$	\$
Other (except fishing/boating equipment, which is the next question):	\$	\$

- Please estimate how much was spent *in the Los Cabos area only*, if any, on fishing and boating equipment during your most recent trip:

Item	Amount spent:
Rods and reels	\$
Fishing tackle (line, leaders, lures, hooks, sinkers, etc.)	\$
Boat-related purchases (engine parts, rope, anchors, fenders, etc.)	\$
Fishing-related electronics not reported earlier (GPS, depth and fish finders, radios, and other electronics)	\$
All other miscellaneous fishing and marine equipment (coolers, pliers, gloves, storage, outriggers, etc.)	\$

- The last set of questions will help us understand what attracts anglers to Los Cabos. The results will help improve local services for anglers and demonstrate to government officials how much their sportfishing industry can increase *if* proper conservation measures are in place.
 - a) How did you first hear about Los Cabos?

- Magazines
- Television, travel shows
- Television, other types of shows
- Internet, travel Web sites
- Internet, other Web sites
- From a friend who visited Los Cabos
- From a friend who did not visit Los Cabos
- A public event such as a travel show, outdoor show, fishing show, etc.
- Other, please describe

b) Please rate how *important* each one of the following reasons was in your decision to visit Los Cabos. Rate each on a scale of 1 to 5, with 1=*least important* and 5=*most important*. Please mark “N/A” if you are unaware of the service area or have no opinion.

Price (overall lodging, amenities, etc.)	1	2	3	4	5	N/A
	← <i>Least Important</i>			<i>Most Important</i> →		
Resort amenities such as spa, beaches, etc.	1	2	3	4	5	N/A
	← <i>Least Important</i>			<i>Most Important</i> →		
Relative peace and quiet	1	2	3	4	5	N/A
	← <i>Least Important</i>			<i>Most Important</i> →		
Nightlife	1	2	3	4	5	N/A
	← <i>Least Important</i>			<i>Most Important</i> →		
Feeling of security and safety	1	2	3	4	5	N/A
	← <i>Least Important</i>			<i>Most Important</i> →		
Fishing	1	2	3	4	5	N/A
	← <i>Least Important</i>			<i>Most Important</i> →		
Other outdoor activities (biking, parasailing, adventure sports, etc.)	1	2	3	4	5	N/A
	← <i>Least Important</i>			<i>Most Important</i> →		

c) Now that you have visited Los Cabos, please provide your opinion about each variable that added to or diminished from a trip.

Price (lodging, transportation, amenities)?	1	2	3	4	5	N/A
	← <i>Very Disappointed</i>			<i>Very Satisfied</i> →		
Resort amenities such as spa, beaches, etc?	1	2	3	4	5	N/A
	← <i>Very Disappointed</i>			<i>Very Satisfied</i> →		
Relative peace and quiet	1	2	3	4	5	N/A
	← <i>Very Disappointed</i>			<i>Very Satisfied</i> →		
Nightlife	1	2	3	4	5	N/A
	← <i>Very Disappointed</i>			<i>Very Satisfied</i> →		
Feeling of security and safety	1	2	3	4	5	N/A

How would you rate the quality of the sportfishing? In other words, please rate your sportfishing experience in terms of fish availability and opportunities to hook a fish (not the boat and crew) compared to your expectations prior to fishing:

1 2 3 4 5 N/A
← *Poor* *Average* *Excellent* →

Would you recommend visiting Los Cabos to a friend who is looking for a good place to go fishing?

1 2 3 4 5 N/A
← *Not Likely* *Very Likely* →

g) Regarding the prices and fees you paid for lodging (hotels, motels, condos, timeshare, camping, etc.) were the prices:

- Extremely high
- Moderately high
- Fair
- Moderately low
- Extremely low
- Don't know/no opinion

h) Regarding the prices you paid for restaurants and meals, were the prices:

- Extremely high
- Moderately high
- Fair
- Moderately low
- Extremely low
- Don't know/no opinion

i) Please mark which answer best describes the primary reason for visiting Los Cabos:

- Relax/get away
- See someplace new
- Sportfishing
- Diving, boat rides, whale watching and other nonfishing water sports
- Spring break
- Honeymoon
- Visit friends
- Get away from cold weather
- Other, please specify

j) Besides fishing, what other activities did you participate in while visiting Los Cabos?

- Spent time on the beach
- Visited nightclubs
- Visited neighboring towns
- Shopped

- Visited a spa/had a massage
- Relaxed around the room/pool
- Explored the town
- Diving, boat rides, or sunset cruises, whale watching and other nonfishing water sports
- Other, please specify

k) What activities did *your travel partners (family members, friends, etc.)* participate in while visiting the Los Cabos area?

- Spent time on the beach
- Visited nightclubs
- Visited neighboring towns
- Shopped
- Visited a spa/had a massage
- Relaxed around the room/pool
- Explored the town
- Diving, boat rides, or sunset cruises, whale watching and other nonfishing water sports
- Other, please specify

l) Have you fished outside of the U.S. before?

- Yes (*GO TO NEXT QUESTION*)
- No (*SKIP TO QUESTION #*)

m) In which other countries or foreign locations have you fished?

- | | |
|--|---|
| <input type="checkbox"/> Other Mexico locations | <input type="checkbox"/> Costa Rica |
| <input type="checkbox"/> Guatemala | <input type="checkbox"/> Caribbean |
| <input type="checkbox"/> Other Central America locations | <input type="checkbox"/> South America |
| <input type="checkbox"/> Europe | <input type="checkbox"/> Asia |
| <input type="checkbox"/> Other Pacific locations | <input type="checkbox"/> Other, please specify: |

n) Of all the locations you have fished, if you could only fish in one next year, which location would you choose?

- | | |
|--|--|
| <input type="checkbox"/> Los Cabos area | <input type="checkbox"/> Other Mexico locations |
| <input type="checkbox"/> Costa Rica | <input type="checkbox"/> Guatemala |
| <input type="checkbox"/> Caribbean | <input type="checkbox"/> Other Central America locations |
| <input type="checkbox"/> South America | <input type="checkbox"/> Europe |
| <input type="checkbox"/> Asia | <input type="checkbox"/> Other Pacific locations |
| <input type="checkbox"/> Other, please specify | <input type="checkbox"/> Nowhere. I would not want to fish next year |

o) In which town or area was your hotel or other accommodations located?

- Cabo San Lucas
- East Cape
- San Jose del Cabo
- Corridor between Los Cabos and San Jose del Cabo
- Other: Please report: _____
- I don't recall the name of the location

p) On a scale of 1 to 5, where 1 means very dissatisfied and 5 means very satisfied, how satisfied were you overall with your most recent trip to the Los Cabos area?

1 2 3 4 5 N/A
← *Very Dissatisfied* *Very Satisfied* →

5) The remaining questions will help us explain the types of services and activities different types of visitors use.

d) Your sex:

Male

Female

e) In what year were you born? _____

f) What was your total household income before taxes for last year?

i) Less than \$20,000

ii) \$20,000–\$40,000

iii) \$40,000–\$50,000

iv) \$50,000–\$75,000

v) \$75,000–\$100,000

vi) \$100,000–\$150,000

vii) \$150,000–\$250,000

viii) More than \$250,000

Thank you for your help, patience, and participation!
We wish you the best of success and safety in your future fishing efforts.

**Appendix H: Economic Model Development Report by FIRMUS
Consulting**



THE BILLFISH FOUNDATION

**ECONOMIC IMPACT OF SPORT
FISHING IN THE LOS CABOS
AREA.**

ECONOMIC MODEL

FINAL REPORT

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INTRODUCTION.

The Billfish Foundation (TBF) is a leading international Non Government Organization devoted to the promotion of sustainable sportfishing in the U.S. and other countries.

As part of its activities, TBF is supporting research efforts at the Los Cabos micro region in the State of Baja California Sur in Mexico, in order to establish a methodology of analysis that allows to reasonably estimate the economic impact of sportfishing.

Los Cabos is known worldwide for its sportfishing resources, which have bolstered the destination's economic development, which is based primarily on tourism. In the beginning of its development, the dependence of Los Cabos on sportfishing was greater than it is today, as every day new tourism service companies come into stream to offer a more and more sophisticated destination to anglers and traditional tourists alike.

Nonetheless, the sportfishing activity at Los Cabos is the most important in Mexico, gathering more than 400 fishing boats based in its world-class marina. Other locations nearby complement Los Cabos, as it is the case of Cabo San Lucas and Buenavista.

THE ECONOMIC MODEL

The objective of the present study has been to develop an economic model capable of producing reasonable estimates of the economic impact of the sportfishing activity in the Los Cabos micro region. TBF has defined such impact measurement to be based on multiplier effects within the local economy, and in this manner not to limit it to gross revenues or similar concepts that in general cannot account for the broader benefits of economic activities.

The benefits obtained from sportfishing by the population, generate employment, increase the rate of collection of taxes by the government, and contribute to the region's income.

The development of the proposed economic model has taken into consideration information availability limitations in Mexico, specially in what relates to input-output matrices and multipliers, and therefore constitutes an ad hoc solution for the objective region of Los Cabos. Additionally, we believe that this methodology can be applied in other locations in Latin America where detailed economic information is also scarce.

The formula underlying the economic model proposed utilizes as inputs the results of a set of surveys that has been applied among the Los Cabos business community, and a population of U.S. anglers.

THE TEAM

TBF has assembled a team of specialists in order to develop the project for the Los Cabos area:

- Southwick Associates (SA)—A firm based in Florida with extensive experience in the surveying of economic activities related to fishing and hunting.
- FIRMUS Consulting (FIRMUS)—A firm based in Mexico City specializing in economic and finance studies.

SA developed and led the survey efforts, while FIRMUS has been in charge of the development of the economic impact model.

The following chapters of this report describe the economic impact model proposed, the methodology followed, the main assumptions made, and the results attained after introducing into the model the collected inputs by the survey efforts.

METHODOLOGY.

THE MODEL

The proposed model measures and reports the economic impacts of visiting anglers over the region of Los Cabos. Currently, there are no models or sources of economic multipliers available for the region under study, so it was necessary to develop an ad hoc model that estimated the economic contribution of sportfishing and its associated businesses to the Los Cabos economy, departing from the expenditures made by anglers during their visits to the area, and converting these expenditures into new dollars that go through the Los Cabos economy.

The data regarding the structure of expenditures made by non-local anglers has been captured by means of specific surveys that were conducted by SA in the U.S. Other data related to businesses capture of revenues and corresponding expenses were collected by means of specifically designed surveys.

The survey questionnaires were prepared by SA in order to be applied to charter boat companies, U.S. Anglers, hotel operators, and companies in general within the Los Cabos area in Baja California Sur (BCS). Actual surveys were conducted during 2007 and 2008.

INVENTORY OF DATA VARIABLES AVAILABLE FROM THE SURVEYS

In order to systematize the construction of the economic model, the expected inputs to be available after the application and processing of the different surveys were arranged as an inventory of data variables.

The text in the survey questionnaires prepared by SA was analyzed, and the answers containing input information for the economic model were identified.

The variables were classified according to specific survey questionnaires, and qualitative and quantitative nature. The table in Annex 1 presents the set of identified variables.

Over 100 variables were obtained from the survey questionnaires prepared by SA for charter companies, U.S. anglers, and general companies.

The input variables consider two types of expenses made by anglers: general expenses and sportfishing expenses.

Dollars spent within the Los Cabos area will be separated from dollars spent outside the region on companies such as airlines and travel-related businesses.

As has been explained, the expenditures made by anglers are the primary variable from which subsequent impacts on layers in the economy are estimated.

The variables in the survey questionnaires related to anglers' expenses are the following:

General Expenses by the Angler:

Gasoline, fuel, and oil for your vehicle and boats (rental or personal, not including charter boats)
Taxis, shuttle vans, etc. to get to hotels, marinas, restaurants, etc.
Charter boat fees, fishing guides
Car rental (not including any fuel purchased)
Boat rentals
Marina expenses
Hotels/motels/resorts
Timeshare
Campgrounds
Restaurants, bars, carry-out food
Groceries, food, liquor bought in stores (not in restaurants or bars)
Ice
Bait (natural bait only)
Gifts and souvenirs of any type
Park, entertainment, and amusement admission fees
Fish processing and shipping
Taxidermy
Personal items (toiletries, medicine, etc.)
Fishing tackle
Boat-related purchases
Fishing-related electronics not reported earlier
All other miscellaneous fishing and marine equipment

CONSTRUCTION OF THE ECONOMIC MODEL

The economic model is intended to follow the path of money spent by anglers through the different layers of the economy. The model starts by allocating the angler's expenditures to different economic agents, which in turn use the funds received to obtain inputs, therefore creating a multiplier effect.

In order to produce goods, companies incur production costs, which represent a percentage of the money spent by the angler. The production costs are integrated by the acquisition of inputs, the payment of wages and taxes. When integrating the costs incurred by the companies to satisfy demand, intermediate demand can be estimated. In this manner, every dollar spent by the angler generates a chain of expenses, which is called the multiplier effect.

The sum of expenses made by businesses in the supply chain is called the indirect effect, while the sum of the expenses by employees, business owners, and their families is the induced effect. The direct effect is the amount spent by anglers that starts the whole process. The direct effect, indirect effect, and induced effect add up in order to obtain the total multiplier effect:

$$\text{Multiplier} = \frac{\text{Direct Effect} + \text{Indirect Effect} + \text{Induced Effect}}{\text{Direct Effect}}$$

The multiplier depends on the number of rounds in the economy, and the number of rounds is optimal when the indirect and induced effects are too small to reasonably measure. In this project, the number of rounds of spending was capped at four, meaning that the economic analysis ended after angler's dollars changed hands four times, with very little remaining in the Los Cabos economy at that point.

The proposed model registers the amount spent in each variable and obtains the total expenses by the angler. The amount spent by the angler in order to get a final good is introduced into the economy, where it is needed to produce the good and is distributed among the suppliers of goods and services. The money they receive is distributed again among suppliers of goods and services¹ and employees and their families.

Model

The direct effect is the amount that has been spent by the angler in the economy.

The variables in Tables 1 and 2 are used to obtain the intermediate demand for each type of good. The angler spends his or her money on a particular good, which is the final product of a production chain. The composition of this production chain has been analyzed and the intermediate demands for each type of good has been separated.

¹ Production chains

The economic multipliers are estimated with information from the surveys only. It is assumed that the Los Cabos economy behaves like an island economy where manufacturing activities are practically absent, and therefore most of the investment and consumer goods are imported from outside the region.

We have confirmed this situation through information obtained from the Ministry of Communications and Transportation (SCT), where it becomes clear that the Los Cabos region gets its supplies via highway/maritime transport from the city and port of La Paz.²

Employment considerations

In order to complement the economic impact model, the number of jobs that are created as a result of sportfishing needs to be known.

The surveys have been designed to capture a variable that allows the estimation of the number of additional work posts that respondent companies would hire if their turnaround increased by a certain amount (including sportfishing-related companies). With the corresponding ratio it is possible to estimate the number of additional jobs given a certain increase of revenues in the economy.

Hence, the marginal work posts are the number of jobs that the sportfishing generates directly and indirectly. The following expressions are applicable and reflect the ranges of marginal income considered for different sectors in the surveys questionnaires:

Multiplier Effect in Business in general = Marginal Employment/US \$100,000

Multiplier Effect in Hotels = Marginal Employment/US \$1,000,000

Multiplier Effect in Charter companies = Marginal Employment/US \$200,000

According to the survey results:

- The marginal employment in businesses in general is 10 specialized work posts and 14 nonspecialized work posts for every US \$100,000 of additional turnover.
- The marginal employment in hotels is 60.3 specialized work posts and 98.7 nonspecialized work posts for every US \$1,000,000 of additional turnover.
- The marginal employment in charter companies is 4.6 specialized work posts and 2.2 nonspecialized work posts for every US \$200,000 of additional turnover.

Impact on Taxes

The government benefits from higher tax revenues arising from the sportfishing industry in different ways at federal and local levels:

- ❑ Income tax (ISR, federal).
- ❑ Value added tax (IVA, federal).³
- ❑ Tax on payroll (ISN, local).
- ❑ Tax on hotel services (ISH, local).

² Annual Statistics of Maritime Transport 2005–2006, Coordination of Ports and Maritime Transport, Ministry of Communications and Transports.

³ Determined through the sum of intermediate demands.

Name	Rate
ISR	28%
IVA	15%
ISN	2.5%
ISH	3%

Table 3

The basis to determine the ISN is integrated by the expenses on wages and salaries.

The ISH⁴ has two components: a) Hotels: ISH taking as its base 40% of total invoicing; b) Timeshare: ISH based on 50% of total maintenance fees.

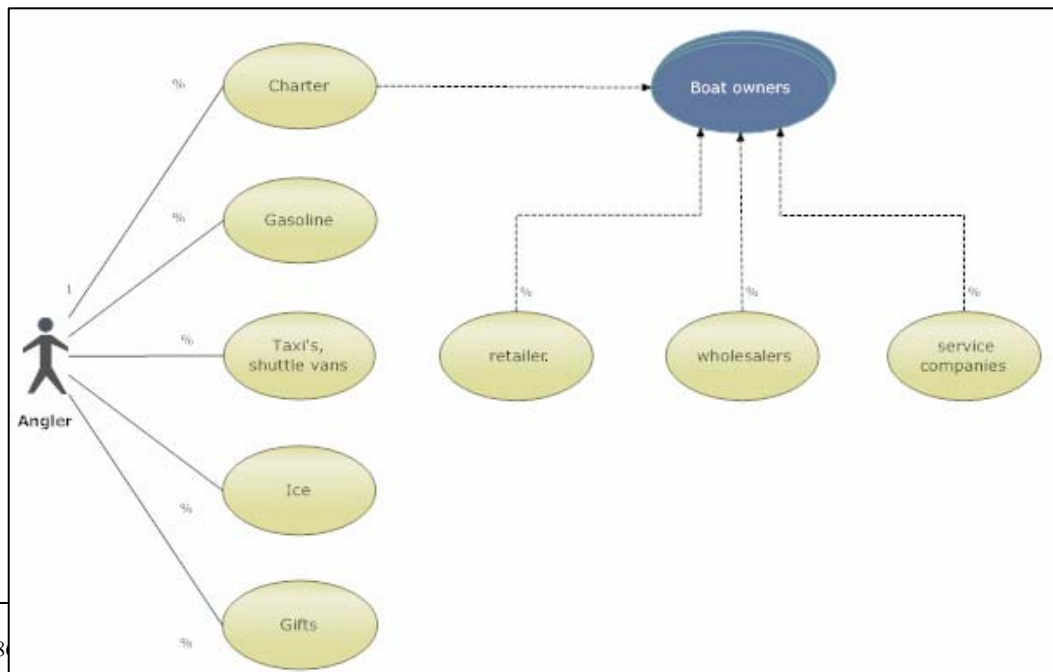
The total amount collected by the government is then:

$$T_t = \text{ISR} + \text{IVA} + \text{ISN} + \text{ISH}$$

PROPOSED ECONOMIC MODEL AND ITS APPLICATION.

MODEL STRUCTURE

The logic in its calculations can be explained by means of the following chart that presents the case for charter companies:



⁴ Decree number 158

On the left-hand side, the angler makes expenditures in different items or concepts, to suppliers. The suppliers invest part of the revenue received in their own supplies, another part on labor and a final part on fix costs.

The same logic applies to the cases of businesses in general and hotel companies.

It can be argued that, although the Los Cabos economy resembles that of an island, there is still an additional economic round for the dollars spent by the anglers. This factor will be dealt with in later subsections.

Model characteristics and features

The economic impact model has been developed in an Excel spreadsheet with the following sheets:

- Model
- Marginal Employment
- Classification of Variables
- Government

The Model

The model is presented in a matrix format:

General expenses	\$		Apportionments (where businesses who receive angler's first purchases spend their \$)														
	expenses	% of total expenses	% e retailers		% e wholesalers		% e manufacturers		% e service company		% e professional companies		% e Others		Mark-up (or, % payments to households (employees/ business owners))	%s Summed	
Gasoline, fuel and oil for your vehicle and boats (rental or personal, not including charterboats)	\$ 148.63	7.36%	11.5%	\$17.03	0.0%	\$0.00	26.4%	\$33.23	3.3%	\$13.83	0.0%	\$0.00	3.5%	\$14.16	43.3%	\$64.38	100.0%
Taxi's, shuttle vans, etc to get to hotels, marinas,	\$ 48.66	2.61%	11.5%	\$5.57	10.6%	\$5.16	7.1%	\$3.48	3.3%	\$4.52	8.7%	\$4.22	3.5%	\$4.64	43.3%	\$21.07	100.0%
Charterboat fees, fishing	\$ 390.67	20.31%	16.0%	\$62.35	12.2%	\$47.64	4.6%	\$18.00	8.6%	\$33.58	8.3%	\$34.69	5.3%	\$23.05	43.8%	\$171.11	93.3%
Car rental (not including any fuel purchased)	\$ 38.84	2.08%	11.5%	\$4.45	10.6%	\$4.12	7.1%	\$2.77	3.3%	\$3.61	8.7%	\$3.37	3.5%	\$3.70	43.3%	\$16.82	100.0%
Boat rentals	\$ 55.34	2.97%	11.5%	\$6.34	10.6%	\$5.87	7.1%	\$3.95	3.3%	\$5.15	8.7%	\$4.80	3.5%	\$5.27	43.3%	\$23.36	100.0%
Hotels/motels/resorts:	\$ 450.93	24.21%	7.0%	\$31.68	21.6%	\$37.33	1.3%	\$5.37	4.0%	\$18.13	2.5%	\$11.25	12.7%	\$57.33	43.1%	\$221.44	98.3%
Marina expenses	\$ 52.70	2.83%	11.5%	\$6.04	10.6%	\$5.59	7.1%	\$3.76	3.3%	\$4.30	8.7%	\$4.57	3.5%	\$5.02	43.3%	\$22.82	100.0%
Restaurants, bars, carry-out food	\$ 232.75	12.43%	11.5%	\$26.66	10.6%	\$24.68	7.1%	\$16.63	3.3%	\$21.64	8.7%	\$20.19	3.5%	\$22.17	43.3%	\$100.78	100.0%

The rows in the first three columns contain the variables related to the angler's expenditures in the Los Cabos area economy, resulting from the statistical analysis of the survey questionnaires.

As these expenditures are received by businesses, they are destined to the businesses' own expenses. The columns under the title "Apportionments (where businesses who receive angler's purchases spend their \$\$)" allocate the funds captured by the firms from anglers according to the percentages resulting from the statistical analysis of the survey questionnaires, including payments to households which are based on the Mark-Up percentage reported by the business surveys.

For example, the row corresponding to anglers expenses on "Charter boat fees, fishing guides" considers the results from the charter companies survey; the row titled "Hotels/motels/resorts" utilizes the results from the hotels surveys. But the row for "Gifts and souvenirs" will contain data from the General Business Survey.

General expenses	Location Quotients (the % of expenditures that remain in the Los Cabos economy)															
	% e		% e		% e		% e		% e		% e		% of payments to households (wages, salaries and business profits)		The \$\$ from anglers' original expenditures that remain Los Cabos (Direct Effect)	The % of angler expenditures that remain Los Cabos (Direct Effect)
	retailers	wholesalers	retailers	wholesalers	manufacturers	wholesalers	service company	wholesalers	professional companies	wholesalers	Others	wholesalers	wholesalers	wholesalers		
	\$ retailers spend in Cabo	\$ wholesalers spend in Cabo	\$ retailers spend in Cabo	\$ wholesalers spend in Cabo	\$ manufs spend in Cabo	\$ wholesalers spend in Cabo	\$ service co's spend in Cabo	\$ wholesalers spend in Cabo	\$ prof co's spend in Cabo	\$ wholesalers spend in Cabo	\$ others spend in Cabo	\$ wholesalers spend in Cabo	\$ wholesalers spend in Cabo	% of paychecks remaining in Cabo		
Gasoline, fuel and oil for your vehicle and boats (rental or personal, not including charterboats)	39.6%	\$6.74	42.1%	\$0.00	0.0%	\$0.00	42.0%	\$5.81	38.3%	\$0.00	34.4%	\$4.87	39.6%	\$25.50	\$42.92	28.9%
Taxis, shuttle vans, etc to get to hotels, marinas,	39.6%	\$2.21	42.1%	\$2.17	23.3%	\$0.81	42.0%	\$1.90	38.3%	\$1.64	34.4%	\$1.59	39.6%	\$8.34	\$18.67	38.4%
Charterboat fees, fishing	76.8%	\$47.83	73.2%	\$34.88	61.0%	\$10.98	82.7%	\$27.78	78.6%	\$27.27	50.6%	\$11.67	39.6%	\$67.76	\$228.22	58.4%
Car rental (not including any fuel purchased)	39.6%	\$1.76	42.1%	\$1.73	23.3%	\$0.85	42.0%	\$1.52	38.3%	\$1.31	34.4%	\$1.27	39.6%	\$6.66	\$14.90	38.4%
Boat rentals (excl. motels & resorts)	39.6%	\$2.51	42.1%	\$2.47	23.3%	\$0.92	42.0%	\$2.16	38.3%	\$1.87	34.4%	\$1.81	39.6%	\$9.49	\$21.23	38.4%
Marina expenses	68.3%	\$21.64	49.1%	\$47.79	3.8%	\$0.23	71.4%	\$12.35	39.8%	\$4.48	58.3%	\$33.80	39.6%	\$87.63	\$208.57	46.2%
Restaurants, bars, carry-out food	39.6%	\$2.39	42.1%	\$2.35	23.3%	\$0.88	42.0%	\$2.06	38.3%	\$1.78	34.4%	\$1.73	39.6%	\$9.04	\$20.22	38.4%
Groceries, food, liquor bought in stores (not in	39.6%	\$4.27	42.1%	\$4.21	23.3%	\$1.57	42.0%	\$3.68	38.3%	\$3.18	34.4%	\$3.09	39.6%	\$16.16	\$36.16	38.4%

The next block of the matrix determines how much of the angler's expenditures in the Los Cabos economy are exported outside of Los Cabos. The model starts with angler expenditures made within the Los Cabos economy. Once a business receives these dollars, much of it is immediately sent to suppliers and vendors outside the area. From 4% to 83% of business expenses remain in the local economy, with an approximate average of 40% remaining. In this step each apportionment of the angler's dollars is multiplied by a ratio that reports how much remains in Los Cabos. These ratios were developed by the hotel management, charter boat, and general business surveys. This step is also applied to household expenditures, recognizing that households often must purchase common

items outside their area.⁵ The amount left after this step is the net economic activity, or indirect effect, accruing to the Los Cabos economy after the first round of spending. This amount equals 38.4% of the angler's original expenditure (the direct effect) for businesses in general, with the exception of expenditures for fuels and gasoline, which amounts to 28.9%, as its manufacture is made outside the Los Cabos area. These percentages are 58.4% for charter boats and 46.2% for hotels, respectively. Only the dollars found to remain in the local economy move on to the next step considered.

General expenses	Amount spent in Cabo by 2nd effect businesses	Sum of 1st and 2nd round:	Amount spent in Cabo by 3rd effect businesses	Sum of 1st, 2nd & 3rd round:	Amount spent in Cabo by 4th effect businesses	Sum of 1st - 4th rounds:
Gasoline, fuel and oil for your vehicle and boats (rental or personal, not including charterboats)	\$12.39	\$55.31	\$3.58	\$58.88	\$1.03	\$59.92
Taxi's, shuttle vans, etc to get to hotels, marinas	\$7.16	\$25.83	\$2.75	\$28.58	\$1.05	\$29.64
Charterboat fees, fishing	\$133.32	\$361.54	\$77.88	\$439.42	\$45.50	\$484.91
Car rental (not including any fuel purchased)	\$5.72	\$20.62	\$2.19	\$22.81	\$0.84	\$23.65
Boat rentals	\$8.15	\$29.38	\$3.13	\$32.50	\$1.20	\$33.70
Hotels/motels/sports:	\$36.46	\$305.02	\$44.61	\$349.63	\$20.63	\$370.26
Marina	\$7.76	\$27.98	\$2.98	\$30.95	\$1.14	\$32.10
Restaurants, bars, carry-out food	\$34.26	\$123.56	\$13.15	\$136.71	\$5.04	\$141.75
Groceries, food, liquor bought in stores (not in restaurants or bars)	\$13.87	\$50.03	\$5.32	\$55.35	\$2.04	\$57.40
Multipliers:	1.64		1.73			1.776

The next block of columns estimates the effects of the additional rounds of spending. Once the taxi driver spends his angler dollar, each successive round of spending injects 38.4% of the previous round of spending into the economy. For example, for each dollar spent by anglers, the first round of spending was worth 38.4 cents. The second round contributed 38.4% of the first round's value, which is an additional 15 cents. The third and fourth rounds contributed 6 cents and 2 cents. At this point, based on the diminishing level of returns, the impact analysis ceased. Therefore, the total economic activity is \$1.78, which includes the \$1 direct effect (or angler expenditure) plus the

⁵ The ratio reporting the amount of household expenditures sent outside the economy is taken from the business survey. While the proportion of household expenditures sent outside the local economy is expected to be less than businesses expenditures, no other source of information was available. The use of the business ratio is expected to reduce the overall economic impacts reported in this study.

indirect and induced effect of \$0.78.⁶ This amount is also known as the “total multiplier effect,” sometimes known as “economic output” or the “ripple” effect.

Employment

Jobs estimations are based on the total multiplier effect as calculated in the previous section. The employment ratios reported earlier were matched with the corresponding amount of revenue to estimate the total number of jobs.

The business surveys collected information that allowed the estimation of the additional jobs that respondent companies would hire if their revenues increased by a certain amount (including sportfishing-related companies).

The following table summarizes the estimation of additional jobs that would be created in the Los Cabos area if the number of foreign visitors is increased by 1%.

⁶ Input-output analysis typically addresses induced effects separately. Based on the limited information available on personal consumption patterns, such separations were not possible. Payments to households via wages, salaries, and business profits are treated as a separate economic sector.

Government

MARGINAL EMPLOYMENT ANALYSIS:

Number of tourists that visited Los Cabos (2006)(1):	1,426,983	
Average estimated % that go sport fishing (2):	24.5%	
For every 1% of increase in annual visits there will be:	3,496	more anglers
The average expenses per angler add up to (2):	\$ 1,863.13	
Which takes total marginal expenditures to:	\$ 6,513,704.35	

The marginal expenditures are allocated and generate additional jobs needs as follows:

	Marginal Expenditures Allocation	Surveys Marginal Revenues Increment	Marginal Additional Employment @ Revenues Increment	Additional jobs required @ Revenue Increment*	Total Additional jobs in the Los Cabos Area
Gasoline, fuel and oil for your vehicle and boats (rental or personal, not including charterboats)	\$ 519,836.35	\$ 100,000.00	5.20	12.00	62
Taxi's, shuttle vans, etc to get to hotels, marinas, restaurants, etc.	\$ 170,120.63	\$ 100,000.00	1.70	12.00	20
Charterboat fees, fishing guides	\$ 1,365,824.65	\$ 200,000.00	6.83	7.00	48
Car rental (not including any fuel purchased)	\$ 135,788.85	\$ 100,000.00	1.36	12.00	16
Boat rentals	\$ 193,474.64	\$ 100,000.00	1.93	12.00	23
Hotels/motels/resorts:	\$ 1,576,709.90	\$ 1,000,000.00	1.58	80.00	126
Marina expenses	\$ 184,244.91	\$ 100,000.00	1.84	12.00	22
Restaurants, bars, carry-out food	\$ 813,719.22	\$ 100,000.00	8.14	12.00	98
Groceries, food, liquor bought in stores (not in restaurants or bars)	\$ 329,473.25	\$ 100,000.00	3.29	12.00	40
Ice	\$ 18,039.92	\$ 100,000.00	0.18	12.00	2
Bait (natural bait only)	\$ 155,926.43	\$ 100,000.00	1.56	12.00	19
Gifts & souvenirs of any type	\$ 281,751.37	\$ 100,000.00	2.82	12.00	34
Park, entertainment, and amusement admission fees	\$ 302,133.68	\$ 100,000.00	3.02	12.00	36
Fish processing & shipping:	\$ 80,760.10	\$ 100,000.00	0.81	12.00	10
Taxidermy (only taxidermy fees paid to Mexico businesses, not U.S. taxidermists)	\$ 4,335.17	\$ 100,000.00	0.04	12.00	1
Others	\$ 36,848.98	\$ 100,000.00	0.37	12.00	4
Personal items (toiletries, medicine, etc.)	\$ 38,527.11	\$ 100,000.00	0.39	12.00	5
Sportfishing Expenses	\$ -	\$ 100,000.00	0.00	12.00	0
Fishing tackle (line, leaders, lures, hooks, sinkers, etc.)	\$ 111,910.43	\$ 100,000.00	1.12	12.00	13
Boat-related purchases (engine parts, rope, anchors, fenders, etc.)	\$ 84,186.29	\$ 100,000.00	0.84	12.00	10
Fishing-related electronics not reported earlier (GPS, depth & fish finders, radio, and other electronics)	\$ 29,716.92	\$ 100,000.00	0.30	12.00	4
All other miscellaneous fishing and marine equipment (coolers, pliers, gloves, storage, outriggers, etc.)	\$ 80,375.53	\$ 100,000.00	0.80	12.00	10
		\$ 100,000.00	0.00	12.00	0
Totals	\$ 6,513,704.35	\$ 3,300,000.00			602

Percentage out of Economically Active Population (3):

0.8%

Notes.-

(1) Municipal Annual Statistics of Los Cabos. Number of guests in hotels of at least 3 stars.

(2) Surveys conducted by The Billfish Foundation in Los Cabos in 2007-2008.

(3) Census Bureau (Conapo), 75,605 persons in 2006.

Tax revenues are also based on the total multiplier effect. Business tax revenues were estimated by multiplying the tax rates reported earlier with the total economic effect and the expected mark-up

applied by each sector. The value added tax (VAT), or sales tax was applied directly only to anglers' expenditures. According to its nature, the VAT estimates only capture the revenues from anglers (the direct effect) and do not capture the revenues generated as part of the indirect effect (business and household expenditures). The payroll tax was applied to the mark-up assigned to each stage, and the hotel tax was applied only to anglers' reported expenditures for lodging.

The following tables in the model summarize the federal and local governments' expected revenues per angler arising from sportfishing.

Model	
Margin from Surveys (%)	43%
Businesses Aggregate Income	\$ 3,309.77
ISR tax rate (Federal)	28%
ISR payable	\$ 401.28
Angler's expenditures	\$ 1,863.13
VAT (Federal)	15%
Income	\$ 279.47
% Expenditures: labor	\$ 1,433.13
ISN (Local)	2.5%
Income	\$ 35.83
Total Taxes	\$ 716.57

	Hotels
Income	\$ 450.99
ISH (Local)	3%
Total Local Taxes	\$ 5.41

Total Revenues Model	\$ 721.99
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For federal taxes, these tables use the mark-up data from the business surveys to determine a taxable margin, which is the base to apply the income tax rate. VAT is estimated over the basis of anglers' aggregate expenditures in the region.

GENERAL EXAMPLE

In order to explain the details of the proposed economic model, we will use the following example based on anglers' expenditures on charter boats.

The results from the applied surveys indicate that the anglers spend US \$390.45 on charter boats fees (direct effect I row No. 1 in the table below). In order to give the service, charter boats need inputs that are acquired from retailers, wholesalers, services companies, professional companies, and other (2-8).

By applying to the direct effect components the percentage of anglers' expenses that remain in Los Cabos, we obtain the direct effect in Los Cabos. In this case, the direct effect's first round in the Los Cabos economy equals US \$228.22 (row No. 9), equivalent to 58.4% of the direct effect in row No. 1.

Three more economic rounds are added by applying the same 58.4%, and allowing to reach to an aggregate effect of US \$875.36 (row No.14), including the direct effect in row No. 1.

	Concept	Direct Effect (1)	The % of anglers' direct expenditures that remain in Los Cabos.	Direct effect in Los Cabos (2)
1	Angler expenses charter boat fees	\$390.45		
	<i>% of total expenses</i>	<i>21.0%</i>		
2	Expenses in retailers	\$62.35	76.8%	\$47.89
3	Expenses in wholesalers	\$47.64	73.2%	\$34.88
4	Expenses in manufacturers	\$18.00	61.0%	\$10.98
5	Expenses in service company	\$33.59	82.7%	\$27.78
6	Expenses in professional companies	\$34.69	78.6%	\$27.27
7	Expenses in Others	\$23.05	50.6%	\$11.67
8	Mark-up (or, % payments to households (employees/ business owners)	\$171.11	39.6%	\$67.76
	<i>Amount of the total expenses %</i>			<i>58.4%</i>
9	1st Economy Effect			\$228.22
10	2 nd Economy Effect			\$133.32
11	3 rd Economy Effect			\$77.88
12	4 th Economy Effect			\$45.50

13	Sum of 1st - 4th rounds:	\$484.91
14	Sum of 1st - 4th rounds & Direct Effect:	\$875.36

Table 4

CONCLUSIONS AND RECOMMENDATIONS

The main conclusions and recommendations of the present study are as follows:

1. The model proposed in the present study was designed to work with variables of The Billfish Foundation surveys.
2. Although there is a lack of systematic, precise economic information in Mexico at the regional level, economic impacts can nonetheless be measured.
3. Due to the fact that the Los Cabos economy tends to be a shallow one, economy rounds after the fourth one considered in the development of the economic impact model will tend to zero rapidly, and therefore the methodology applied captures in a practical way the economic impact of the sportfishing activity in the region.
4. As has been explained, the conclusions presented in this report consider only the benefits received by the local economy of Los Cabos by excluding the effects of expenditures made to economic agents outside the micro region.

If the Los Cabos economy was more vertically integrated (that is, the whole of the economic benefits remained in the region), the economic multiplier determined as 1.78 by this study would rise to 2.70, a figure that is not distant from similar analyses in more integrated continental economies in other countries, which allows to confirm to a certain degree the general assumptions made in the methodology followed.

PRIVATE BOAT	BOAT OWNERS	US ANGLERS	COMPANIES
Restaurants, bars, carry-out food	% Exp: Professional companies (accountants, attorneys, architects)	Boat rentals	% Exp: Retailers (sportfishing-related retailers and any other type of retailer)
Groceries, food, liquor bought in stores (not in restaurants or bars)	% Exp: inside BCS	Hotels/motels/resorts:	% Exp: inside BCS
Ice	% Exp: others	Timeshare (please only report the cost associated with your trip and not any part of the purchase price):	% Exp: Wholesalers
Bait (natural bait only)	% Exp: inside BCS	Campgrounds	% Exp: inside BCS
Park, entertainment, and amusement admission fees	% Exp: outside BCS	Restaurants, bars, carry-out food	% Exp: Manufacturers
Fish processing & shipping:	% Exp: inputs Baits, ice, fuel from BCS businesses	Groceries, food, liquor bought in stores (not in restaurants or bars)	% Exp: inside BCS
Personal items (toiletries, medicine, etc.)	% Exp: inputs Maintenance : minor, overhauling from BCS businesses	Ice	% Exp: Service companies (including other charterboats)
Expenditures made IN MEXICO (sport fishing)	% Exp: inputs Fishing gear from BCS businesses	Bait (natural bait only)	% Exp: inside BCS
Rods & reels	If your annual business revenues increased by \$200,000, How many additional skilled employees would you have to hire?	Gifts & souvenirs of any type	% Exp: Professional companies (accountants, attorneys, architects)
Fishing tackle (line, leaders, lures, hooks, sinkers, etc.)	If your annual business revenues increased by \$200,000, How many additional unskilled employees would you have to hire?	Park, entertainment, and amusement admission fees	% Exp: inside BCS
Boat-related purchases (engine parts, rope, anchors, fenders, etc.)	Mark-up	Fish processing & shipping:	% Exp: others
Fishing-related electronics not reported earlier (GPS, depth & fish finders, radio, and other electronics)		Taxidermy (only taxidermy fees paid to Mexico businesses, not U.S. taxidermists)	% Exp: inside BCS
All other miscellaneous fishing and marine equipment (coolers, pliers, gloves, storage, outriggers, etc.)		Personal items (toiletries, medicine, etc.)	% Exp: outside BCS
		Expenditures made IN MEXICO (sport fishing)	Mark-up
		Rods & reels	If your annual business revenues increased by \$100,000, How many additional skilled employees would you have to hire?
		Fishing tackle (line, leaders, lures, hooks, sinkers, etc.)	
		Boat-related purchases (engine parts, rope, anchors, fenders, etc.)	
		Fishing-related electronics not reported earlier (GPS, depth & fish finders, radio, and other electronics)	
		All other miscellaneous fishing and marine equipment (coolers, pliers, gloves, storage, outriggers, etc.)	

Notes: % Exp: = Percentage out of total Expenses

- Qualitative information in the Surveys.
- Expenses made in the US.
- Quantitative information in the Surveys.
- Subclass of Quantitative information in the Surveys.
- Quantitative information on Sport fishing activities.

ANNEX 1 CLASSIFICATION OF VARIABLES.

SURVEYS QUESTIONNAIRES. INVENTORY OF INPUT VARIABLES FOR THE ECONOMIC MODEL.

PRIVATE BOAT	BOAT OWNERS	US ANGLERS	COMPANIES
Did you visit Los Cabos for the primary purpose of sportfishing?	% Exp: boats and items lasting more than 1 year	How many people were in your direct travel party, including yourself, any kids, family, friend and/or co-workers	% Sales and revenues from Sportfishing charter business
Your sex	% Exp: fuel, fees, etc	How many days did you spend in the Los Cabos area on that trip?	% Sales and revenues from Restaurants
Do you recall buying a fishing license?	% Exp: labor	Did you visit Los Cabos for the primary purpose of sportfishing?	% Sales and revenues from Hotel, lodging
How many days a year do you personally spend in Los Cabos?	% Exp: Skilled labor (captains, mechanics, managerial, etc)	Your sex	% Sales and revenues from Retailers (sportfishing-related retailers and any other type of retailer)
<u>Expenditures in the US:</u>	% Exp: Unskilled labor (mates, cleaning, etc.)	Number of days fished from a boat on most recent trip	% Sales and revenues from Wholesalers
Package trips or tours	% Exp: wages, salaries, labor, your take home pay and company profit.	Number of days fished from a beach/shore/wall	% Sales and revenues from Manufacturers
Airfare (commercial airlines, not including air taxis to your fishing site)	% Exp: Taxes to local and state government, plus permits, licenses	How many days did you fish?	% Sales and revenues from Service companies
Charterboats paid for in the US or outside of Mexico	% Exp: Taxes to national government, plus any federal permits, licenses	Do you recall buying a fishing license?	% Sales and revenues from Professional companies (accountants, attorneys, architects)
<u>Expenditures made IN MEXICO (general)</u>	% Exp: Inventory, supplies, maintenance and services such as computers and support, accountants and attorneys, etc.	<u>Expenditures in the US:</u>	% Sales and revenues from Other
Gasoline, fuel and oil for your vehicle and boats (rental or personal, not including charterboats)	% Exp: Retailers (sportfishing-related retailers and any other type of retailer)	Package trips or tours:	% Exp: boats and items lasting more than 1 year
Taxi's, shuttle vans, etc to get to hotels, marinas, restaurants, etc.	% Exp: inside BCS	Airfare (commercial airlines, not including air taxis to your fishing site):	% Exp: fuel, fees, etc.
Charterboat fees, fishing guides	% Exp: Wholesalers	Charterboats paid for in the US or outside of Mexico	% Exp: labor
Car rental (not including any fuel purchased)	% Exp: inside BCS	<u>Expenditures made IN MEXICO (general)</u>	% Exp: Skilled labor (captains, mechanics, managerial, etc.)
Boat rentals	% Exp: Manufacturers	Gasoline, fuel and oil for your vehicle and boats (rental or personal, not including charterboats)	% Exp: Unskilled labor (mates, cleaning, etc.)
Hotels/motels/resorts	% Exp: inside BCS	Taxi's, shuttle vans, etc to get to hotels, marinas, restaurants, etc.	% Exp: wages, salaries, labor, your take home pay and company profit
Timeshare (please only report the cost associated with your trip and not any part of the purchase price)	% Exp: Service companies (including other charterboats)	Charterboat fees, fishing guides	% Exp: Taxes to local and state government, plus permits, licenses
Campgrounds	% Exp: inside BCS	Car rental (not including any fuel purchased)	% Exp: inventory, supplies, maintenance and services such as computers and support, accountants and attorneys, etc.

Notes: % Exp: = Percentage out of total Expenses

- Qualitative information in the Surveys.
- Expenses made in the US.
- Quantitative information in the Surveys.
- Subclass of Quantitative information in the Surveys.
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